360iResearch

Gaming Market

Global Forecast 2026-2032

MRR-1A1A064C029A | October 2026

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1. Preface

1.1. Objectives of the Study

- Which documented offerings, ownership or licensing rights, and service commitments establish participation in Game Software & Content, Play-Access Services, Dedicated Gaming Devices, Gaming Peripherals & Accessories, and Game Advertising?
- How do the requirements of players, purchasing households, institutional buyers, and advertisers differ, and which entitlements or benefits must each buyer evaluate before committing?
- Which distribution permissions, content rights, platform qualification conditions, and jurisdictional requirements affect access through Gaming Platforms & App Stores, Retailers & Reseller Marketplaces, Direct Producer Sales, and Telecom & Cross-Service Bundles?
- How do Gaming Platform, Immersion Technology, Content Fulfillment Format, Game Execution Model, and Connectivity Requirement affect compatibility, buyer reach, and service commitments without being treated as interchangeable classifications?
- Which account, content-library, add-on compatibility, renewal, and support conditions affect buyer switching or continued use, and which actor controls the relevant commercial relationship?
- How do product purchases, add-on and virtual-item purchases, subscriptions, usage-based access, and advertising create different incentives for rights holders, distributors, access providers, and buyers?
- How should Primary Play Purpose, Player Age, Game Genre, and Player Participation inform audience and buyer comparisons while preserving the distinction between intended users, actual players, and purchasers?
- Which commercial comparisons remain defensible across bundles, mixed portfolios, multiple platforms, and overlapping value-chain disclosures, and what conditions must be established before selecting an entry route or business relationship?

1.2. Market Definition

Gaming is defined as the Global commercial provision of Game Software & Content, Play-Access Services, Dedicated Gaming Devices, Gaming Peripherals & Accessories, and Game Advertising. The study includes offerings intended for Recreation & Entertainment, Learning & Education, and Fitness & Physical Activity across the accepted platforms and play contexts.

The commercial boundary distinguishes players from purchasing households and institutional buyers, and treats advertisers as buyers of game-related advertising. Developers, publishers, rights holders, platform operators, access providers, device suppliers, and distributors are considered according to their roles in supplying or enabling an included offering. Their

participation does not make every stage of the same commercial relationship an independent contribution.

PC Platforms, Mobile Platforms, and Connected TV Platforms are included play contexts, but their inclusion does not turn all general-purpose computing devices into Dedicated Gaming Devices. Upstream components, development tools, general connectivity, production support, spectator activities, and merchandise remain adjacent value-chain context rather than becoming included offerings solely through their association with Gaming.

1.3. Market Segmentation & Coverage

Offering identifies what is supplied. Game Software & Content comprises Base Games, Expansions & Playable Add-Ons, and In-Game Items, Currency & Features. Play-Access Services comprises Single-Game Access, Game-Library Access, Online Multiplayer & Platform Services, and Cloud Gaming Access. Dedicated Gaming Devices comprises Home Gaming Consoles, Handheld Gaming Systems, and Gaming XR Headsets. Gaming Peripherals & Accessories and Game Advertising complete the offering boundary, distinguishing supporting player equipment from advertiser-funded commercial activity.

Gaming Platform distinguishes Console Platforms, PC Platforms, Mobile Platforms, Standalone XR Platforms, Connected TV Platforms, and Multi-Platform Offerings. This axis describes the platform context rather than the identity of every device sold. Multi-Platform Offerings preserves the distinction between an offering spanning platforms and separate platform-specific commercial objects.

Immersion Technology distinguishes Conventional Screen-Based Only, Virtual Reality Only, Augmented & Mixed Reality Only, and Combined Immersion Modes. These categories describe the experience supported by an offering, independently of its distribution channel or revenue mechanism.

Primary Play Purpose comprises Recreation & Entertainment, Learning & Education, and Fitness & Physical Activity. Player Age comprises Children, Teenagers, Young Adults, Middle-Aged Adults, and Older Adults. Purpose and age inform audience interpretation without equating the player with the purchaser or substituting a content rating for a demographic classification.

Content Fulfillment Format distinguishes Physical Game Media and Digital Delivery. Game Execution Model distinguishes Local Execution, Remote Execution, and Local & Remote Execution. Connectivity Requirement distinguishes Offline Play, Periodic Online Validation, and Always-Online Play. These are separate commercial conditions: a delivery format does not, by definition, determine where execution occurs or which connectivity requirement applies.

Distribution Channel comprises Gaming Platforms & App Stores, Retailers & Reseller Marketplaces, Direct Producer Sales, and Telecom & Cross-Service Bundles. This axis identifies the route to the purchaser and the relevant intermediary or direct relationship; a bundle does not bring every accompanying non-gaming service into the study.

Revenue Mechanism comprises Product Purchases, Add-On & Virtual-Item Purchases, Subscription & Term-Access Fees, Usage-Based Play Fees, and Game Advertising. It describes

the commercial mechanism rather than an additional offering boundary. Game Advertising therefore appears both as an included offering and as a revenue mechanism without representing two separate activities solely because it has two classifications.

Game Genre comprises Shooters, Fighting & Combat, Platformers & Arcade Action, Action-Adventure & Survival, Narrative Adventure, Role-Playing, Strategy, Simulation & Sandbox, Sports, Racing, Puzzle, Word & Trivia, Board & Card, Social Casino, Music & Rhythm, Party & Social Play, and Idle & Incremental. Genre characterizes playable content; it does not automatically assign a shared device or access library to an exclusive audience. Social Casino remains an included genre rather than a blanket extension of the study to wagering services.

Player Participation distinguishes Single-Player Only, Multiplayer Only, and Single-Player & Multiplayer. Together, the axes provide independent views of included Gaming activity, not additive commercial opportunities. Classifications should be applied to the offering or play context they actually describe.

Table 1. Global Gaming Market Segmentation & Coverage

Segmentation	Coverage
Connectivity Requirement	• Always-Online Play • Offline Play • Periodic Online Validation
Content Fulfillment Format	• Digital Delivery • Physical Game Media
Distribution Channel	• Gaming Platforms & App Stores • Direct Producer Sales • Retailers & Reseller Marketplaces • Telecom & Cross-Service Bundles
Game Execution Model	• Local Execution • Local & Remote Execution • Remote Execution

Table 1 - continued

Segmentation	Coverage
Game Genre	• Role-Playing • Shooters • Strategy • Action-Adventure & Survival • Simulation & Sandbox • Puzzle • Sports • Platformers & Arcade Action • Board & Card • Social Casino • Party & Social Play • Racing • Fighting & Combat • Narrative Adventure • Idle & Incremental • Music & Rhythm • Word & Trivia
Gaming Platform	• Mobile Platforms • Console Platforms • PC Platforms • Multi-Platform Offerings • Standalone XR Platforms • Connected TV Platforms
Immersion Technology	• Conventional Screen-Based Only • Combined Immersion Modes • Virtual Reality Only • Augmented & Mixed Reality Only

Offering	• Game Software & Content
	  o In-Game Items, Currency & Features
	  o Base Games
	  o Expansions & Playable Add-Ons
	• Dedicated Gaming Devices
	  o Home Gaming Consoles
	  o Handheld Gaming Systems
	  o Gaming XR Headsets
	• Game Advertising
	• Play-Access Services
	  o Game-Library Access
	  o Online Multiplayer & Platform Services
	  o Single-Game Access
	  o Cloud Gaming Access
	• Gaming Peripherals & Accessories

Player Age	• Young Adults • Middle-Aged Adults • Teenagers • Older Adults • Children

Table 1 - continued

Segmentation	Coverage
Player Participation	• Single-Player Only • Single-Player & Multiplayer • Multiplayer Only
Primary Play Purpose	• Recreation & Entertainment • Learning & Education • Fitness & Physical Activity
Revenue Mechanism	• Add-On & Virtual-Item Purchases • Product Purchases • Game Advertising • Subscription & Term-Access Fees • Usage-Based Play Fees

Sources & Evidence

1. Can these classic games be played indefinitely? - Nintendo Support

· Taxonomy evidence: Nintendo's current Australian support page permits offline play of the specified Nintendo Switch Online classic-game collections while requiring active membership and online membership verification every seven days. This directly establishes a periodic-validation entitlement pattern; it does not establish identical terms for all games, territories, or 2025 entitlements. ([nintendo.com](https://www.nintendo.com/au/support/articles/can-these-classic-games-be-played-indefinitely/))

· Taxonomy evidence: The documented combination of disconnected sessions and later mandatory verification supports separating periodic authorization from both unrestricted offline authorization and continuous online gameplay. This three-way taxonomy mapping is an analytical inference from the stated contract conditions. ([nintendo.com](https://www.nintendo.com/au/support/articles/can-these-classic-games-be-played-indefinitely/))

2. Xbox Play Anywhere - Microsoft Game Development

· Taxonomy evidence: Microsoft's Xbox Play Anywhere explanation distinguishes cross-entitlement from cross-progression and optional cross-play, and states that a qualifying digital purchase grants Xbox and Windows PC play without an additional purchase. This establishes an actual combined-endpoint entitlement pattern rather than merely cross-platform availability. ([developer.microsoft.com](https://developer.microsoft.com/en-us/games/resources/develop-for-xbox-anywhere/))

· Taxonomy evidence: The explicit separation of cross-entitlement and cross-play supports the study rule that multiplayer interoperability alone does not place independently purchased licenses in Multi-Platform Offerings. This is a taxonomy inference from the supplier's stated rights structure, not a market-wide equivalence claim. ([developer.microsoft.com](https://developer.microsoft.com/en-us/games/resources/develop-for-xbox-anywhere/))

3. Playing to Wait: A Taxonomy of Idle Games

   · Taxonomy evidence: The 2018 primary academic study identifies idle games as a game family and incremental games as a related subset, while recognizing clicker terminology and differences among these labels. It supports a distinct commercial-category vocabulary without treating every subtype as identical. ([researchgate.net](https://www.researchgate.net/profile/Sultan-Alharthi-xx.xx/publication/324658906_Playing_to_Wait_A_Taxonomy_of_Idle_Games/links/61865636d7d1af224bbaeea6/Playing-to-Wait-A-Taxonomy-of-Idle-Games.pdf))

   · Taxonomy evidence: The study distinguishes incremental accumulation-oriented games from simulation games. This supports reassessing the Simulation & Sandbox boundary rather than automatically absorbing every resource-accumulation game into simulation. The exclusive dominant-loop allocation remains the study's analytical rule. ([researchgate.net](https://www.researchgate.net/profile/Sultan-Alharthi-xx.xx/publication/324658906_Playing_to_Wait_A_Taxonomy_of_Idle_Games/links/61865636d7d1af224bbaeea6/Playing-to-Wait-A-Taxonomy-of-Idle-Games.pdf))

   · Taxonomy evidence: An independently researched idle/incremental family addresses an explicit gap in the retained genre partition. The publication establishes category identity, not current Global revenue, market share, or exhaustive coverage. ([researchgate.net](https://www.researchgate.net/profile/Sultan-Alharthi-xx.xx/publication/324658906_Playing_to_Wait_A_Taxonomy_of_Idle_Games/links/61865636d7d1af224bbaeea6/Playing-to-Wait-A-Taxonomy-of-Idle-Games.pdf))

4. Industrial Strategy Sector Definitions List - Video Games

   · Taxonomy evidence: The UK government's industrial-strategy definition describes video games through development and distribution and maps it to computer-game publishing and interactive leisure-software development codes. This independently supports the software/content component but does not establish a hardware-inclusive Global expenditure denominator. ([gov.uk](https://www.gov.uk/government/publications/industrial-strategy/industrial-strategy-sector-definitions-list))

   · Taxonomy evidence: The official definition cautions that its industry codes may not capture the full video-game ecosystem. Its activity-based boundary is therefore not interchangeable with this study's final-consumer transaction boundary, leaving hardware and ecosystem perimeter choices explicit. ([gov.uk](https://www.gov.uk/government/publications/industrial-strategy/industrial-strategy-sector-definitions-list))

5. Getting Children Moving Using Active Video Games: A Report of the GenMove Programme

   · Taxonomy evidence: The original WHO publication page identifies active video games and describes the GenMove programme as using game engagement to encourage physical activity. This supports the application-family identity, not consumer revenue, health efficacy, or automatic inclusion of institutional deployment. ([who.int](https://www.who.int/publications/b/xx.xx))

   · Taxonomy evidence: An explicitly physical-activity-oriented game application supports distinguishing marketed purpose from interface technology or recreational genre. Restricting this axis to qualifying consumer playable offerings remains the study's boundary rule. ([who.int](https://www.who.int/publications/b/xx.xx))

6. Microsoft / Activision Blizzard Merger Inquiry - Final Report

- Taxonomy evidence: The CMA's final report, paragraphs xx.xx-xx.xx, explains that genre definitions and assignments can be arbitrary, change over time, and differ between publishers/platforms; it assesses the overall publishing market rather than defining separate legal markets by genre. This limits any claim that the retained reporting partition is a universal natural classification. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/644939aa529eda000c3b0525/Microsoft_Activision_Final_Report_.pdf))
- Taxonomy evidence: The CMA recognizes commercial genre classification but notes overlapping labels and does not define separate legal markets by genre. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/644939aa529eda000c3b0525/Microsoft_Activision_Final_Report_.pdf))
- Taxonomy evidence: The 2023 report distinguishes catalog access, multiplayer functionality, and cloud-server access, including bundled provision. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/644939aa529eda000c3b0525/Microsoft_Activision_Final_Report_.pdf))
- Taxonomy evidence: Its multi-game-service definition distinguishes single-game subscriptions from access to a broad catalog.
- Taxonomy evidence: Paragraphs xx.xx and xx.xx distinguish catalog access from acquiring individual game licenses.
- Taxonomy evidence: Paragraph xx.xx(g) separately identifies online multiplayer capabilities within gaming subscriptions.
- Taxonomy evidence: Paragraph xx.xx distinguishes cloud-server access using separately obtained games from catalog inclusion.
- Taxonomy evidence: Paragraph xx.xx identifies console, PC, and mobile access; paragraph xx.xx also identifies smart-TV endpoints. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/644939aa529eda000c3b0525/Microsoft_Activision_Final_Report_.pdf))
- Taxonomy evidence: Console access is identified separately from PC and mobile access.
- Taxonomy evidence: PC gaming is an expressly identified access category.
- Taxonomy evidence: Mobile devices are an expressly identified gameplay endpoint.
- Taxonomy evidence: Smart TVs are identified as endpoints for consumer cloud gameplay.
- Taxonomy evidence: The report describes services available across several endpoint families; this does not independently establish transferable-license terms.
- Taxonomy evidence: The 2023 report distinguishes physical game purchases from digital storefront distribution. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/644939aa529eda000c3b0525/Microsoft_Activision_Final_Report_.pdf))
- Taxonomy evidence: Physical console games can be purchased through intermediaries or directly from console manufacturers. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/644939aa529eda000c3b0525/Microsoft_Activision_Final_Report_.pdf))
- Taxonomy evidence: The report separately recognizes digital game acquisition through console storefronts. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/644939aa529eda000c3b0525/Microsoft_Activision_Final_Report_.pdf))
- Taxonomy evidence: Console storefronts perform game-distribution functions, including for their operators' associated services. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/644939aa529eda000c3b0525/Microsoft_Activision_Final_Report_.pdf))
- Taxonomy evidence: Shooter is expressly recognized as a game genre. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/644939aa529eda000c3b0525/Microsoft_Activision_Final_Report_.pdf))
- Taxonomy evidence: Role-playing is among the report's recognized commercial game genres. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/644939aa529eda000c3b0525/Microsoft_Activision_Final_Report_.pdf))
- Taxonomy evidence: Strategy is among the report's recognized commercial game genres. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/644939aa529eda000c3b0525/Microsoft_Activision_Final_Report_.pdf))
- Taxonomy evidence: Sport is among the report's recognized commercial game genres. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/644939aa529eda000c3b0525/

7. Section 6B - Appliances, Household Equipment, and Other Selected Items
   - Taxonomy evidence: The official consumer-expenditure questionnaire identifies gaming-console and accessory acquisitions, separately excluding video games from that purchase class. This adds direct purchase-classification support for the included hardware/peripheral component of Product Purchases without establishing a Global value or denominator. ([census.gov](https://www.census.gov/programs-surveys/ce/information-booklet/section-6b.html))
   - Taxonomy evidence: The U.S. purchase questionnaire separates computer games from gaming consoles/accessories; this supports component separation, not a Global revenue perimeter. ([census.gov](https://www.census.gov/programs-surveys/ce/information-booklet/section-6b.html))
   - Taxonomy evidence: The questionnaire identifies gaming consoles as a household purchase class.
   - Taxonomy evidence: The gaming-console purchase class lists PlayStation and Xbox among its examples.
   - Taxonomy evidence: The same purchase class lists Nintendo Switch and Steam Deck, supporting inclusion of these dedicated systems within the broad device family.
   - Taxonomy evidence: Controllers, gaming headsets, and carrying cases are explicit gaming-accessory examples.
   - Taxonomy evidence: Computer software, including computer games, is separately identified from gaming consoles/accessories.
8. FTC Video Game Loot Box Workshop - Staff Perspective
   - Taxonomy evidence: The staff paper distinguishes initial game acquisition from subsequent expansion packs, season passes, and virtual-item transactions. ([ftc.gov](https://www.ftc.gov/system/files/documents/reports/staff-perspective-paper-loot-box-workshop/loot_box_workshop_staff_perspective.pdf))
   - Taxonomy evidence: It describes initial game purchases as distinct from later purchasable content.
   - Taxonomy evidence: Expansion packs and passes supplying upcoming game content are identified commercial additions.
   - Taxonomy evidence: Identified supplemental purchases include cosmetic items, characters, card packs, progression benefits, and stronger equipment.
9. Consumer Protection Cooperation Network - Key Principles on In-Game Virtual Currencies
   - Taxonomy evidence: The March xx.xx 2025 principles define purchased in-game virtual currencies as value used to obtain digital game content or services. They distinguish currency acquisition from subsequent expenditure. ([commission.europa.eu](https://commission.europa.eu/document/download/8af13e88-xx.xx-436c-b137-9853e7fe866a_en?filename=Key+principles+on+in-game+virtual+currencies.pdf))
   - Taxonomy evidence: This supports the currency/content distinction; the taxonomy's single-counting treatment is an analytical allocation rule, not a claim of uniform Global regulation.
   - Taxonomy evidence: The March xx.xx 2025 principles describe purchased in-game virtual currencies as payment representations exchanged for digital game content or services. This supports separating payment denomination from the underlying receipt category. ([commission.europa.eu](https://commission.europa.eu/document/download/8af13e88-xx.xx-436c-b137-9853e7fe866a_en?filename=Key+principles+on+in-game+virtual+currencies.pdf))
   - Taxonomy evidence: The document recognizes purchases of in-game digital content and services using real money or purchased virtual currency. It does not make currency conversion an additional final-market sale in this study. ([commission.europa.eu](https://commission.europa.eu/document/download/8af13e88-xx.xx-436c-b137-9853e7fe866a_en?filename=Key+principles+on+in-game+virtual+currencies.pdf))

10. Games Consoles - European Commission
    - Taxonomy evidence: The European product scope describes mains-powered consoles using external televisions and dedicated console operating systems. Its narrower regulatory scope is not treated as the entire Global device market. ([energy-efficient-products.ec.europa.eu](https://energy-efficient-products.ec.europa.eu/product-list/games-consoles_en))
    - Taxonomy evidence: The scope explicitly distinguishes dedicated console operating systems from conventional PC operating systems.
    - Taxonomy evidence: Controllers, input peripherals, docking stations, power supplies, and connecting cables are identified separately from the regulated console itself.
11. Kids and Video Games - Federal Trade Commission Consumer Advice
    - Taxonomy evidence: Consumer guidance identifies consoles, handheld gaming devices, computers, and tablets as gameplay devices. ([consumer.ftc.gov](https://consumer.ftc.gov/articles/kids-and-video-games))
    - Taxonomy evidence: Handheld gaming devices are expressly named as a consumer gameplay-device category.
    - Taxonomy evidence: The guidance identifies purchasable weapons, currency, loot boxes, outfits, and bonus levels; it also notes that paid game versions can limit advertising.
    - Taxonomy evidence: The guidance recognizes consumer games in virtual- and augmented-reality environments.
12. Online Nation 2022 Report
    - Taxonomy evidence: The report distinguishes headset hardware for VR gameplay from its processing host, including computer-, console-, phone-dependent, and standalone configurations. No audience proportions are used. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/online-research/online-nation/2022/online-nation-2022-report.pdf))
    - Taxonomy evidence: Standalone headsets are defined as not requiring a computer or smartphone to deliver the experience.
    - Taxonomy evidence: The report identifies VR headsets dependent on an external PC.
    - Taxonomy evidence: Phone-dependent VR uses the smartphone's screen and processing, supporting separation from standalone-headset ecosystems.
    - Taxonomy evidence: Console-dependent VR is identified separately from standalone-headset configurations.
13. OECD Digital Economy Outlook 2024, Volume 1 - Virtual Reality and Its Opportunities and Risks
    - Taxonomy evidence: The chapter distinguishes VR from AR/MR and notes inconsistent immersive-technology terminology. The AR/MR grouping is an analytical choice to avoid overlapping labels. ([oecd.org](https://www.oecd.org/en/publications/2024/xx.xx/oecd-digital-economy-outlook-2024-volume-1_d30a04c9/full-report/component-xx.xx.html))
    - Taxonomy evidence: AR is described as combining the real world with a digital layer, including camera-based phone/tablet gameplay; exclusivity of any marketed edition is not established.
    - Taxonomy evidence: The chapter distinguishes standalone headset hardware from systems using a separate computer.
14. How We're Responding to Renewed Interest in Immersive Technologies
    - Taxonomy evidence: The June xx.xx 2023 explanation distinguishes nonimmersive gameplay examples from immersive technologies. ([ofcom.org.uk](https://www.ofcom.org.uk/internet-based-services/technology/how-were-responding-to-renewed-interest-in-immersive-technologies))
    - Taxonomy evidence: It identifies headset-based virtual experiences as VR, supporting the VR family rather than proving edition-level exclusivity.
    - Taxonomy evidence: AR overlays digital content on the real world; MR blends physical and digital objects in interacting environments. Exclusivity remains unverified.

15. WebXR Augmented Reality Module - Level 1

- Taxonomy evidence: The specification permits compatible systems to support VR sessions, AR sessions, or both. This is configuration evidence, not proof of a marketed game or device launch. ([w3.org](https://www.w3.org/TR/webxr-ar-module-xx.xx/))
- Taxonomy evidence: It distinguishes AR output intended for integration with the user's environment from the VR session model.

16. An Empirical Study of Trends of Popular Virtual Reality Games and Their Complaints

- Taxonomy evidence: The empirical study explicitly distinguishes games requiring VR hardware from games with optional VR support, substantiating the conventional/VR combined configuration without current market-share claims. ([asgaard.ece.ualberta.ca](https://asgaard.ece.ualberta.ca/papers/Journal/IEEE_2021_Epp_An_Empirical_Study_of_Trends_of_Popular_Virtual_Reality_Games_and_Their_Complaints.pdf))
- Taxonomy evidence: The study defines VR-only games by their requirement for VR hardware.

17. IAB Creative Guidelines and Best Practices in Advertising in Gaming

- Taxonomy evidence: The guidelines distinguish advertising within active gameplay from advertising associated with spectators and streams, supporting a separately supplied game-advertising deliverable. ([iab.com](https://www.iab.com/wp-content/uploads/2024/xx.xx/IAB_Creative_Guidelines_Best_Practices_Advertising_Gaming_March_2024.pdf))
- Taxonomy evidence: The framework recognizes intrinsic, adjacent, interstitial, and audio game-advertising contexts and discusses rewarded placements. These are examples within the retained family, not a claimed exclusive subtype partition.
- Taxonomy evidence: The source's broader spectator and livestream coverage is outside this taxonomy's frozen boundary.

18. NAPCS Product List for NAICS 5112, 518 and 54151

- Taxonomy evidence: The legacy official software-product classification recognizes personal-use entertainment, education, and computer games together. It supports distinguishing intended consumer outcomes, but does not prescribe this three-part purpose partition. ([www2.census.gov](https://www2.census.gov/library/reference/napcs/product-list/web-xx.xx-xx.xx-xx.xx-final-reformatted-edited-us111009.pdf))
- Taxonomy evidence: The classification includes software intended for entertainment in the home and explicitly includes computer games, supporting recreational consumer play as an application. ([www2.census.gov](https://www2.census.gov/library/reference/napcs/product-list/web-xx.xx-xx.xx-xx.xx-final-reformatted-edited-us111009.pdf))
- Taxonomy evidence: The classification includes software combining educational and entertaining functions, including products for young children. Its broader software coverage does not make every educational application an in-scope playable game. ([www2.census.gov](https://www2.census.gov/library/reference/napcs/product-list/web-xx.xx-xx.xx-xx.xx-final-reformatted-edited-us111009.pdf))

19. Getting children moving using active video games: a report of the GenMove programme

- Taxonomy evidence: The 2025 intergovernmental report distinguishes movement arising incidentally from entertainment games from games designed around explicit physical-activity objectives. This supports classifying primary purpose separately from interface or movement mechanics. ([sportanddev.org](https://www.sportanddev.org/sites/default/files/2025-xx.xx/xx.xx-eng.pdf))
- Taxonomy evidence: The report identifies active video games as games involving physical movement and discusses their use in homes as well as institutional settings. Only the nonclinical consumer-play application is retained here; no efficacy claim is imported. ([sportanddev.org](https://www.sportanddev.org/sites/default/files/2025-xx.xx/xx.xx-eng.pdf))
- Taxonomy evidence: The report explicitly notes that some active games retain entertainment as their primary purpose, supporting retention of recreational movement-based games within entertainment when exercise is incidental. ([sportanddev.org](https://www.sportanddev.org/sites/default/files/2025-xx.xx/xx.xx-eng.pdf))

20. Children and Parents: Media Use and Attitudes Report

- Taxonomy evidence: The report published May xx.xx 2026 measures children's gaming and parental oversight separately. Younger-child observations use parent or guardian responses, while older children also answer directly; these are player observations, not purchaser-age expenditure data. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/media-literacy-research/children/2026-children-and-parents-report/children-and-parents-media-use-and-attitudes-report-2025-xx.xx.pdf?v=xx.xx))
- Taxonomy evidence: Gaming is observed among younger children, including ages xx.xx-xx.xx and xx.xx-xx.xx within the proposed child band. The cited gaming findings do not establish demand below age three. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/media-literacy-research/children/2026-children-and-parents-report/children-and-parents-media-use-and-attitudes-report-2025-xx.xx.pdf?v=xx.xx))
- Taxonomy evidence: The report explicitly defines teenagers as ages xx.xx-xx.xx and separately discusses parental gaming rules for that group, supporting a teenage-player category distinct from parental purchasing roles. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/media-literacy-research/children/2026-children-and-parents-report/children-and-parents-media-use-and-attitudes-report-2025-xx.xx.pdf?v=xx.xx))
- Taxonomy evidence: The report treats gaming as a free-time activity and describes entertainment and social interaction in its qualitative gaming findings. These observations support recreational purpose, not Global demand proportions. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/media-literacy-research/children/2026-children-and-parents-report/children-and-parents-media-use-and-attitudes-report-2025-xx.xx.pdf?v=xx.xx))

21. Adults' Media Use and Attitudes Report

- Taxonomy evidence: Published April xx.xx 2026, the report uses UK adult survey fieldwork conducted in September-November 2025 and documents gaming differences across adult ages. It supplies audience evidence rather than age-specific gaming receipts. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/media-literacy-research/adults/adults-media-use-and-attitudes-2026/adults-media-use-and-attitudes-2026-report.pdf?v=xx.xx))
- Taxonomy evidence: The report observes gaming among ages xx.xx-xx.xx. This corroborates gameplay within part of the proposed young-adult band, but the published grouping crosses its age-xx.xx lower boundary. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/media-literacy-research/adults/adults-media-use-and-attitudes-2026/adults-media-use-and-attitudes-2026-report.pdf?v=xx.xx))
- Taxonomy evidence: The report documents gaming among adults aged xx.xx and above, supporting inclusion of older players without an upper age ceiling. It does not establish the proposed band's Global prevalence. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/media-literacy-research/adults/adults-media-use-and-attitudes-2026/adults-media-use-and-attitudes-2026-report.pdf?v=xx.xx))
- Taxonomy evidence: A qualitative participant describes gaming primarily to maintain social connections. This supports including social play within recreational purpose, without treating the example as a population estimate. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/media-literacy-research/adults/adults-media-use-and-attitudes-2026/adults-media-use-and-attitudes-2026-report.pdf?v=xx.xx))

22. Online activities of Canadian youth, cybervictimization and exposure to harmful content

- Taxonomy evidence: The April xx.xx 2025 publication analyzes the 2022 Canadian Internet Use Survey and reports online video-game participation by age. Its observations concern users, not spending or a Global 2025 market allocation. ([www150.statcan.gc.ca](https://www150.statcan.gc.ca/n1/pub/xx.xx-xx.xx-x/xx.xx-xx.xx-x2025002-eng.htm?wbdisable=false))
- Taxonomy evidence: The publication separately reports online gameplay for ages xx.xx-xx.xx and xx.xx-xx.xx. It supports young-adult participation, while leaving the exact xx.xx-xx.xx component unresolved. ([www150.statcan.gc.ca](https://www150.statcan.gc.ca/n1/pub/xx.xx-xx.xx-x/xx.xx-xx.xx-x2025002-eng.htm?wbdisable=false))
- Taxonomy evidence: Online video-game participation is reported separately for ages xx.xx-xx.xx and xx.xx-xx.xx. Both observations fall wholly within the proposed xx.xx-xx.xx reporting band; no combined rate is calculated. ([www150.statcan.gc.ca](https://www150.statcan.gc.ca/n1/pub/xx.xx-xx.xx-x/xx.xx-xx.xx-x2025002-eng.htm?wbdisable=false))
- Taxonomy evidence: The publication explicitly reports online video-game participation for people aged xx.xx and above, directly supporting the existence of an older-player category with that reporting threshold. ([www150.statcan.gc.ca](https://www150.statcan.gc.ca/n1/pub/xx.xx-xx.xx-x/xx.xx-xx.xx-x2025002-eng.htm?wbdisable=false))

23. Ring Fit Adventure Q&A

- Taxonomy evidence: Nintendo's official Q&A presents Ring Fit Adventure as a commercial game combining an adventure with fitness activity and identifies a priced game/accessory bundle. This corroborates an actual consumer fitness-game offering, not category exhaustiveness, market share, or health efficacy. ([en-americas-support.nintendo.com](https://en-americas-support.nintendo.com/app/answers/detail/a_id/xx.xx/~/ring-fit-adventure-q%26a))

24. Choose plan | Kahoot!+ Study

- Taxonomy evidence: The official personal-study plans include reading, mathematics, and chess learning-game applications and describe parent-managed profiles for personal home use. This corroborates a current consumer commercial application; institutional licenses and nongame study features are not thereby included in Gaming. ([kahoot.com](https://kahoot.com/register/kahoot-study-pricing/))

25. CMA - Microsoft / Activision Blizzard: Phase 1 Decision

- Taxonomy evidence: The September 2022 decision distinguishes downloading games to a device from streaming through a cloud-gaming provider. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/634536048fa8f5153767e533/MSFT.ABK_phase_1_decision_-_1.xx.xx.pdf))
- Taxonomy evidence: Downloaded game access is identified separately from cloud streaming. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/634536048fa8f5153767e533/MSFT.ABK_phase_1_decision_-_1.xx.xx.pdf))
- Taxonomy evidence: Cloud-game streaming is identified as an alternative to downloading a game to the player's device. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/634536048fa8f5153767e533/MSFT.ABK_phase_1_decision_-_1.xx.xx.pdf))
- Taxonomy evidence: The decision documents subscription services combining downloads and streaming, establishing the combined-entitlement pattern at that date. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/634536048fa8f5153767e533/MSFT.ABK_phase_1_decision_-_1.xx.xx.pdf))
- Taxonomy evidence: Buy-to-play is described as a one-time upfront payment for an individual game. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/634536048fa8f5153767e533/MSFT.ABK_phase_1_decision_-_1.xx.xx.pdf))
- Taxonomy evidence: Multi-game subscriptions provide paid access to a curated game catalog, separately from individual game purchases. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/634536048fa8f5153767e533/MSFT.ABK_phase_1_decision_-_1.xx.xx.pdf))

26. CMA - WP6: Cloud Gaming Services: Nature of Competition and Requirements for Native Apps on Mobile Devices

- Taxonomy evidence: The 2024 working paper distinguishes games run on the local user device from games running on data-center servers. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/6687b9fd899a6f92e5d9cd46/WP6_-_Cloud_gaming_services__nature_of_competition_and_requirements_for_native_apps_on_mobile_devices.pdf))
- Taxonomy evidence: Traditional gaming is described as local-device execution rather than cloud execution. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/6687b9fd899a6f92e5d9cd46/WP6_-_Cloud_gaming_services__nature_of_competition_and_requirements_for_native_apps_on_mobile_devices.pdf))
- Taxonomy evidence: Cloud execution runs the game on a server while consumers access it across supported device types. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/6687b9fd899a6f92e5d9cd46/WP6_-_Cloud_gaming_services__nature_of_competition_and_requirements_for_native_apps_on_mobile_devices.pdf))
- Taxonomy evidence: Cloud gameplay relies on the internet connection between the user and remote server. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/6687b9fd899a6f92e5d9cd46/WP6_-_Cloud_gaming_services__nature_of_competition_and_requirements_for_native_apps_on_mobile_devices.pdf))
- Taxonomy evidence: The paper treats cloud catalogs as an alternative game-distribution mechanism to individual app-store downloads. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/6687b9fd899a6f92e5d9cd46/WP6_-_Cloud_gaming_services__nature_of_competition_and_requirements_for_native_apps_on_mobile_devices.pdf))
- Taxonomy evidence: The paper documents game access attached to a broader Prime membership, supporting a cross-service access pattern at that date, not its Global prevalence. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/6687b9fd899a6f92e5d9cd46/WP6_-_Cloud_gaming_services__nature_of_competition_and_requirements_for_native_apps_on_mobile_devices.pdf))

27. Ofcom - Adults' Media Use and Attitudes 2025

- Taxonomy evidence: Ofcom's 2025 report distinguishes games requiring internet access from games playable offline; it does not establish a separate periodic-validation reporting class. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/media-literacy-research/adults/adults-media-use-and-attitudes-2025/adults-media-use-and-attitudes-report-2025.pdf?v=xx.xx))
- Taxonomy evidence: Offline-playable games are explicitly included in Ofcom's gaming definition, without establishing all entitlement-validation conditions. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/media-literacy-research/adults/adults-media-use-and-attitudes-2025/adults-media-use-and-attitudes-report-2025.pdf?v=xx.xx))
- Taxonomy evidence: Internet-dependent gaming is explicitly distinguished from offline-playable gaming. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/media-literacy-research/adults/adults-media-use-and-attitudes-2025/adults-media-use-and-attitudes-report-2025.pdf?v=xx.xx))

28. OECD - Online Computer and Video Games

- Taxonomy evidence: This historical analysis distinguishes retail distribution, direct publisher distribution and internet intermediaries; no historical market estimates are used. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2005/xx.xx/online-computer-and-video-games_g17a1be3/xx.xx.pdf))
- Taxonomy evidence: Retailers are described as consumer-facing merchants with pricing, presentation and supplier relationships. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2005/xx.xx/online-computer-and-video-games_g17a1be3/xx.xx.pdf))
- Taxonomy evidence: The analysis identifies publishers distributing directly to consumers rather than through the traditional retail chain. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2005/xx.xx/online-computer-and-video-games_g17a1be3/xx.xx.pdf))
- Taxonomy evidence: Internet service providers and portals are identified as game-content aggregators and distribution intermediaries. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2005/xx.xx/online-computer-and-video-games_g17a1be3/xx.xx.pdf))
- Taxonomy evidence: The report separately analyzes retail purchases, subscription fees, pay-per-play and advertising as charging or funding models. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2005/xx.xx/online-computer-and-video-games_g17a1be3/xx.xx.pdf))
- Taxonomy evidence: Pay-per-play is a separately described historical model; venue examples are not imported into this study's excluded venue boundary. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2005/xx.xx/online-computer-and-video-games_g17a1be3/xx.xx.pdf))

29. OECD - Tax Challenges Arising from Digitalisation: Report on Pillar One Blueprint

- Taxonomy evidence: The 2020 framework includes streamed, accessed and downloaded games within digital content services.
([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2020/xx.xx/tax-challenges-arising-from-digitalisation-report-on-pillar-one-blueprint_6034ca99/beba0634-en.pdf))
- Taxonomy evidence: Gaming revenue discussions distinguish advertising, subscription access and purchases of additional game features; these are classification references, not current tax-law conclusions.
([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2020/xx.xx/tax-challenges-arising-from-digitalisation-report-on-pillar-one-blueprint_6034ca99/beba0634-en.pdf))
- Taxonomy evidence: Additional levels and game accessories are identified as examples of microtransactions.
([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2020/xx.xx/tax-challenges-arising-from-digitalisation-report-on-pillar-one-blueprint_6034ca99/beba0634-en.pdf))
- Taxonomy evidence: The framework describes players registering and paying subscription fees to access games.
([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2020/xx.xx/tax-challenges-arising-from-digitalisation-report-on-pillar-one-blueprint_6034ca99/beba0634-en.pdf))
- Taxonomy evidence: Advertising within a game is identified as a gaming funding model.
([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2020/xx.xx/tax-challenges-arising-from-digitalisation-report-on-pillar-one-blueprint_6034ca99/beba0634-en.pdf))
- Taxonomy evidence: The framework distinguishes internet-enabled multiplayer interaction from single-player digital content, independently of the access device.
([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2020/xx.xx/tax-challenges-arising-from-digitalisation-report-on-pillar-one-blueprint_6034ca99/beba0634-en.pdf))
- Taxonomy evidence: Single-player games are explicitly recognized separately from multiplayer interaction services.
([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2020/xx.xx/tax-challenges-arising-from-digitalisation-report-on-pillar-one-blueprint_6034ca99/beba0634-en.pdf))
- Taxonomy evidence: Multiplayer gaming includes users interacting in the same game environment, including MMO configurations.
([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2020/xx.xx/tax-challenges-arising-from-digitalisation-report-on-pillar-one-blueprint_6034ca99/beba0634-en.pdf))

30. HMRC - DST14700: Application to Online Games

- Taxonomy evidence: HMRC distinguishes solo play against AI, multiplayer functionality and persistent multiplayer environments, supporting mode-support classification without treating every social feature as core gameplay. ([gov.uk](https://www.gov.uk/hmrc-internal-manuals/digital-services-tax/dst14700))
- Taxonomy evidence: The examples distinguish playing against computer-controlled opponents from playing against other users. ([gov.uk](https://www.gov.uk/hmrc-internal-manuals/digital-services-tax/dst14700))
- Taxonomy evidence: The discussion identifies multiplayer environments in which other users and their interaction are central to the game experience.
([gov.uk](https://www.gov.uk/hmrc-internal-manuals/digital-services-tax/dst14700))
- Taxonomy evidence: The illustrative games include both solo-versus-AI and human multiplayer modes within the same offering, supporting a combined-support category rather than duplicate counting.
([gov.uk](https://www.gov.uk/hmrc-internal-manuals/digital-services-tax/dst14700))

31. Google Play Console Help - Choose a Category and Tags for Your App or Game

- Taxonomy evidence: Google Play's category guidance provides commercial discovery labels, not a universal cross-platform or mutually exclusive study taxonomy. ([support.google.com](https://support.google.com/googleplay/android-developer/answer/xx.xx?hl=en))
- Taxonomy evidence: Adventure is a recognized Google Play game category; the study narrows this peer to narrative-led adventure. ([support.google.com](https://support.google.com/googleplay/android-developer/answer/xx.xx?hl=en))
- Taxonomy evidence: Role playing is a recognized game category. ([support.google.com](https://support.google.com/googleplay/android-developer/answer/xx.xx?hl=en))
- Taxonomy evidence: Strategy is a recognized game category. ([support.google.com](https://support.google.com/googleplay/android-developer/answer/xx.xx?hl=en))
- Taxonomy evidence: Simulation is a recognized game category; this does not independently validate the study's sandbox aggregation. ([support.google.com](https://support.google.com/googleplay/android-developer/answer/xx.xx?hl=en))
- Taxonomy evidence: Sports is a recognized game category. ([support.google.com](https://support.google.com/googleplay/android-developer/answer/xx.xx?hl=en))
- Taxonomy evidence: Racing is a recognized game category. ([support.google.com](https://support.google.com/googleplay/android-developer/answer/xx.xx?hl=en))
- Taxonomy evidence: Puzzle is a recognized game category. ([support.google.com](https://support.google.com/googleplay/android-developer/answer/xx.xx?hl=en))
- Taxonomy evidence: Word and trivia are separately recognized game categories. ([support.google.com](https://support.google.com/googleplay/android-developer/answer/xx.xx?hl=en))
- Taxonomy evidence: Board and card are separately recognized game categories. ([support.google.com](https://support.google.com/googleplay/android-developer/answer/xx.xx?hl=en))
- Taxonomy evidence: Music is a recognized game category. ([support.google.com](https://support.google.com/googleplay/android-developer/answer/xx.xx?hl=en))

32. Steamworks Documentation - Steam Tags

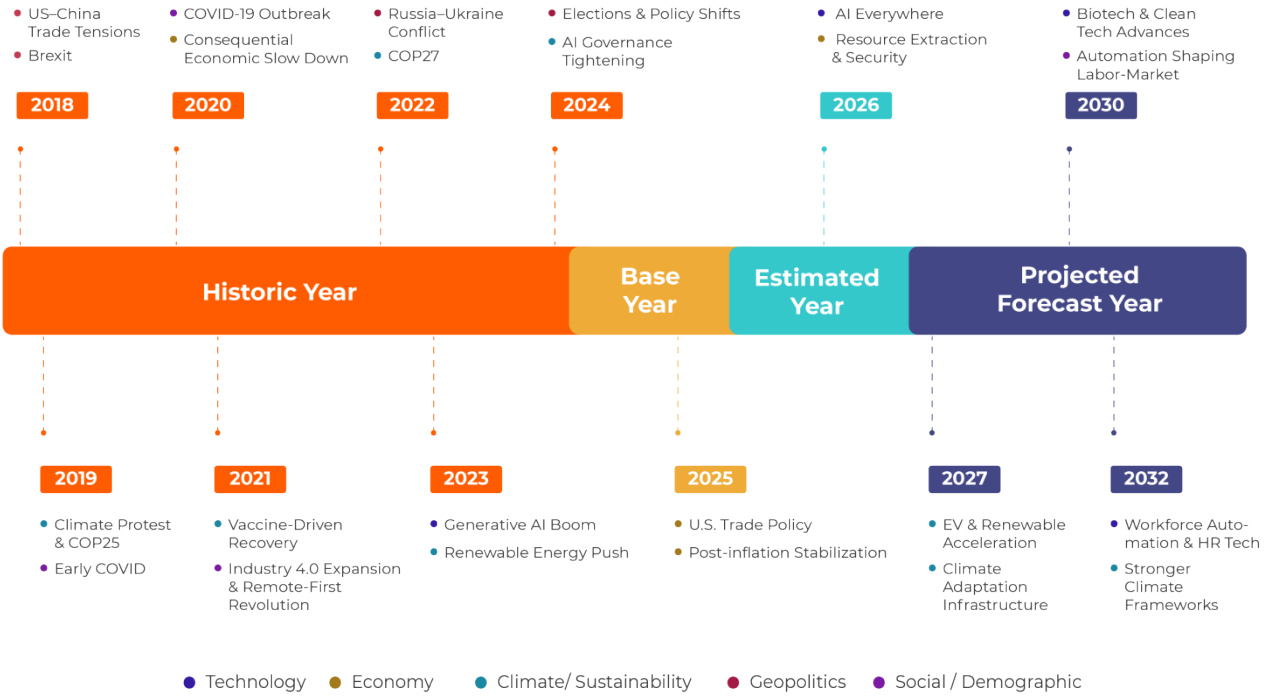
- Taxonomy evidence: Steam's documentation separates genre and subgenre from visuals, themes, features and player support, supporting distinct classification questions rather than a single mixed tag axis. ([partner.steamgames.com](https://partner.steamgames.com/doc/store/tags?l=english))
- Taxonomy evidence: The documentation explicitly presents Action, Platformer and Precision Platformer at different genre depths. It does not establish the study's combined arcade partition. ([partner.steamgames.com](https://partner.steamgames.com/doc/store/tags?l=english))

33. Steam - Popular Tags
    - Taxonomy evidence: Steam's public tag index documents commercial discovery vocabulary; its multi-tag structure does not validate exclusive study allocations. ([store.steampowered.com](https://store.steampowered.com/tag/browse/))
    - Taxonomy evidence: Shooter and several shooter subgenre labels appear in the index. ([store.steampowered.com](https://store.steampowered.com/tag/browse/))
    - Taxonomy evidence: Fighting, fighter and beat-'em-up labels are documented. ([store.steampowered.com](https://store.steampowered.com/tag/browse/))
    - Taxonomy evidence: Platformer, Arcade and Runner are documented labels. ([store.steampowered.com](https://store.steampowered.com/tag/browse/))
    - Taxonomy evidence: Action-Adventure, Survival and Open World Survival Craft are documented labels. ([store.steampowered.com](https://store.steampowered.com/tag/browse/))
    - Taxonomy evidence: Visual Novel, Interactive Fiction and Narrative labels support the narrative-adventure vocabulary. ([store.steampowered.com](https://store.steampowered.com/tag/browse/))
    - Taxonomy evidence: Sandbox, Management, Building and several simulation labels are documented. ([store.steampowered.com](https://store.steampowered.com/tag/browse/))
    - Taxonomy evidence: Music and Rhythm are documented labels. ([store.steampowered.com](https://store.steampowered.com/tag/browse/))
    - Taxonomy evidence: Party Game, Party and Minigames are documented labels, without establishing this study's social-play boundary. ([store.steampowered.com](https://store.steampowered.com/tag/browse/))
34. UK Gambling Commission - Written Evidence to the Immersive and Addictive Technologies Inquiry
    - Taxonomy evidence: The Gambling Commission's January 2019 submission identifies social casino as casino-style social gaming without prizes of money or money's worth. This supports the commercial distinction, not a current uniform Global legal classification. ([committees.parliament.uk](https://committees.parliament.uk/writtenevidence/xx.xx/html/))
    - Taxonomy evidence: The submission distinguishes upfront game purchases from additional monetization through purchased in-game items. ([committees.parliament.uk](https://committees.parliament.uk/writtenevidence/xx.xx/html/))
35. NVIDIA - Frequently Asked Questions for GeForce NOW
    - Taxonomy evidence: The inspected U.S. FAQ permits purchases of additional streaming hours beyond a membership allowance. This establishes that supplier's usage-based charge, not a Global price, share or 2025 prevalence estimate. ([nvidia.com](https://www.nvidia.com/en-us/geforce-now/faq/))
36. Nintendo - About Game-Key Cards
    - Taxonomy evidence: Nintendo describes game-key cards as physical cards with no game data. This demonstrates why physical packaging and playable-payload fulfillment must be distinguished in the study rule. ([nintendo.com](https://www.nintendo.com/en-gb/Hardware/Nintendo-Switch-xx.xx/Nintendo-Switch-xx.xx-Game-Key-Cards-xx.xx.html))
    - Taxonomy evidence: Game-key cards require the game data to be downloaded. Classifying that payload as digital is the study's disclosed analytical mapping, not Nintendo's retail-format terminology. ([nintendo.com](https://www.nintendo.com/en-gb/Hardware/Nintendo-Switch-xx.xx/Nintendo-Switch-xx.xx-Game-Key-Cards-xx.xx.html))
    - Taxonomy evidence: Nintendo states that the key-card format requires an initial internet download but can subsequently authorize game startup without an internet connection; game-specific online features remain a separate issue. ([nintendo.com](https://www.nintendo.com/en-gb/Hardware/Nintendo-Switch-xx.xx/Nintendo-Switch-xx.xx-Game-Key-Cards-xx.xx.html))
37. Epic Games Support - How Do I Run Games in Offline Mode Using the Epic Games Launcher?
    - Taxonomy evidence: Epic states that eligible installed single-player games support offline launcher play, while online multiplayer and connected services may be unavailable. This supports distinguishing offline gameplay from optional online functionality, not indefinite authorization for every title. ([epicgames.com](https://www.epicgames.com/help/c-xx.xx/c-xx.xx/a19005803))

1.4. Years Considered for the Study

2024 is the historical year, 2025 is the base year, 2026 is the estimated year, and 2032 is the forecast horizon endpoint. Historical and base-year interpretations are distinguished from estimated-year and forecast interpretations.

Figure 1. Global Gaming Market, Years Considered for the Study



1.5. Currency Considered for the Study

The reporting currency is the U.S. dollar (USD). Monetary reporting uses an absolute-value scale.

1.6. Language Considered for the Study

The study is published in American English.

1.7. Key Stakeholders

- Players and purchasing households: Evaluate content suitability, compatible devices, access entitlements, account conditions, and the consequences of switching or service discontinuation.
- Education and physical-activity purchasers: Assess offerings classified under Learning & Education or Fitness & Physical Activity against institutional access, licensing, support, and intended-user requirements.

- Game developers, publishers, and rights holders: Determine which offerings and rights they control, which buyers they can reach, and which distribution or licensing relationships support that access.
- Platform operators, storefronts, and play-access providers: Evaluate content relationships, service entitlements, platform participation conditions, and the responsibilities attached to ongoing player access.
- Dedicated device, peripheral, and accessory suppliers: Assess platform compatibility, content and service dependencies, distribution access, and the support commitments associated with their offerings.
- Retailers, resellers, telecom providers, and bundle partners: Clarify distribution rights, entitlement fulfillment, customer ownership, and responsibility for combined gaming and cross-service relationships.
- Advertisers and advertising intermediaries: Evaluate the game-related audience proposition, placement rights, suitability conditions, and the distinction between advertising activity and player-funded offerings.
- Investors and financing partners: Examine evidenced commercial rights, channel dependencies, service obligations, and mixed-portfolio boundaries before assessing a Gaming business proposition.
- Public authorities, ratings bodies, and industry associations: Clarify the status and applicability of legal requirements, ratings, and industry guidance in commercial-access and player-protection decisions.

2. Research Methodology

2.1. Introduction

The Gaming study separates what is offered, how play is delivered, who purchases the offering, and which commercial rights enable access. This framing spans software and content, play-access services, dedicated devices, peripherals and accessories, and game advertising within the Global boundary.

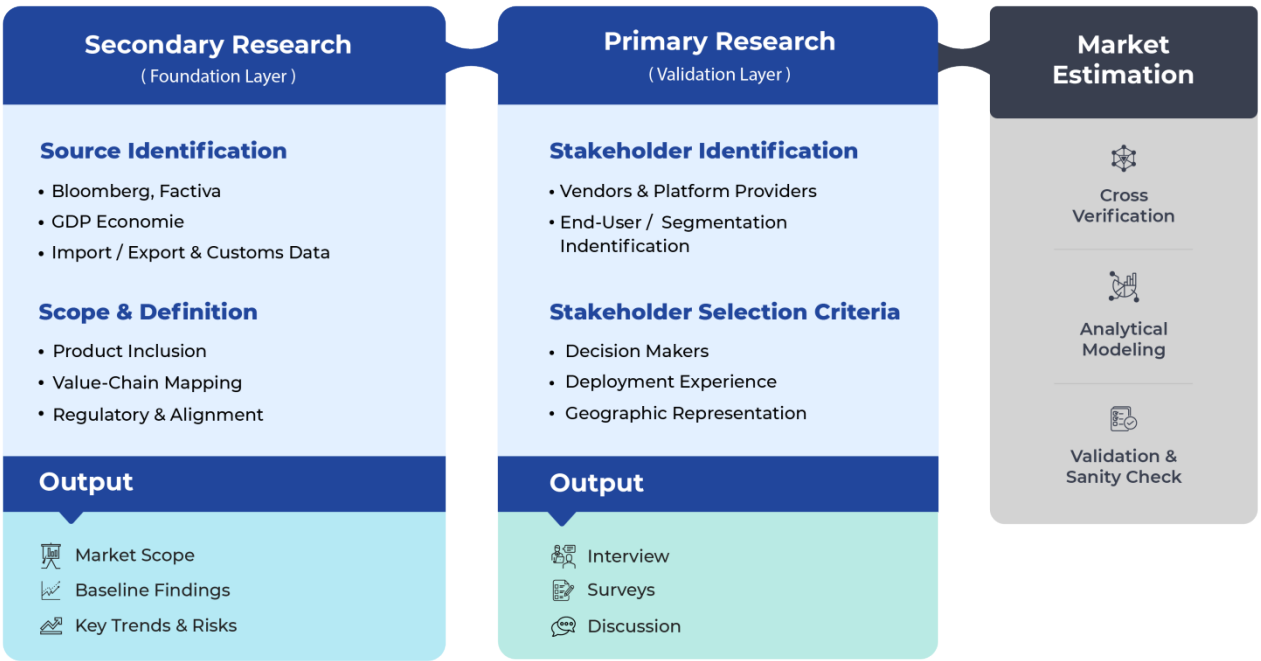
Commercial observations are distinguished from economic interpretation and prospective scenarios. A plausible explanation of demand, switching, or distribution incentives is not treated as independent proof of a numerical conclusion.

2.2. Research Design

The design centers on the included offering, its buyer, and the commercial entitlement or benefit being supplied. Producer, intermediary, purchaser, and player roles are kept distinct so that a content license, a storefront relationship, a subscription, and a dedicated device are not treated as equivalent commercial objects.

Each question is bounded by the relevant offering, jurisdiction, period, and distribution relationship. Evidence is interpreted according to what it can establish, while the qualitative challenge layer tests commercial explanations without replacing claim-specific support.

Figure 2. Global Gaming Market, Research Design



2.2.1. Primary Research

The analyst team conducted primary research as a qualitative challenge layer for market definition, segmentation, demand conditions, adoption barriers, and competitive interpretation. This work tested analytical assumptions and sharpened explanations of market mechanisms without serving as standalone support for numerical estimates.

The qualitative challenge layer is evaluated alongside secondary evidence within the accepted market scope. It informs conditional market explanations and hypotheses for subsequent quantitative analysis. Numerical estimates require their own supporting evidence, and a forecast derived from a qualitative assumption does not independently validate that assumption. Final interpretation must reconcile the qualitative findings with the completed quantitative results.

2.2.2. Secondary Research

Secondary evidence has claim-specific roles. Official company portfolios can establish advertised offerings; mandatory filings can establish disclosed business facts within their stated perimeter; and public ownership or licensing records can establish commercial relationships. Official authorization and policy records are relevant to access conditions within their applicable jurisdictions.

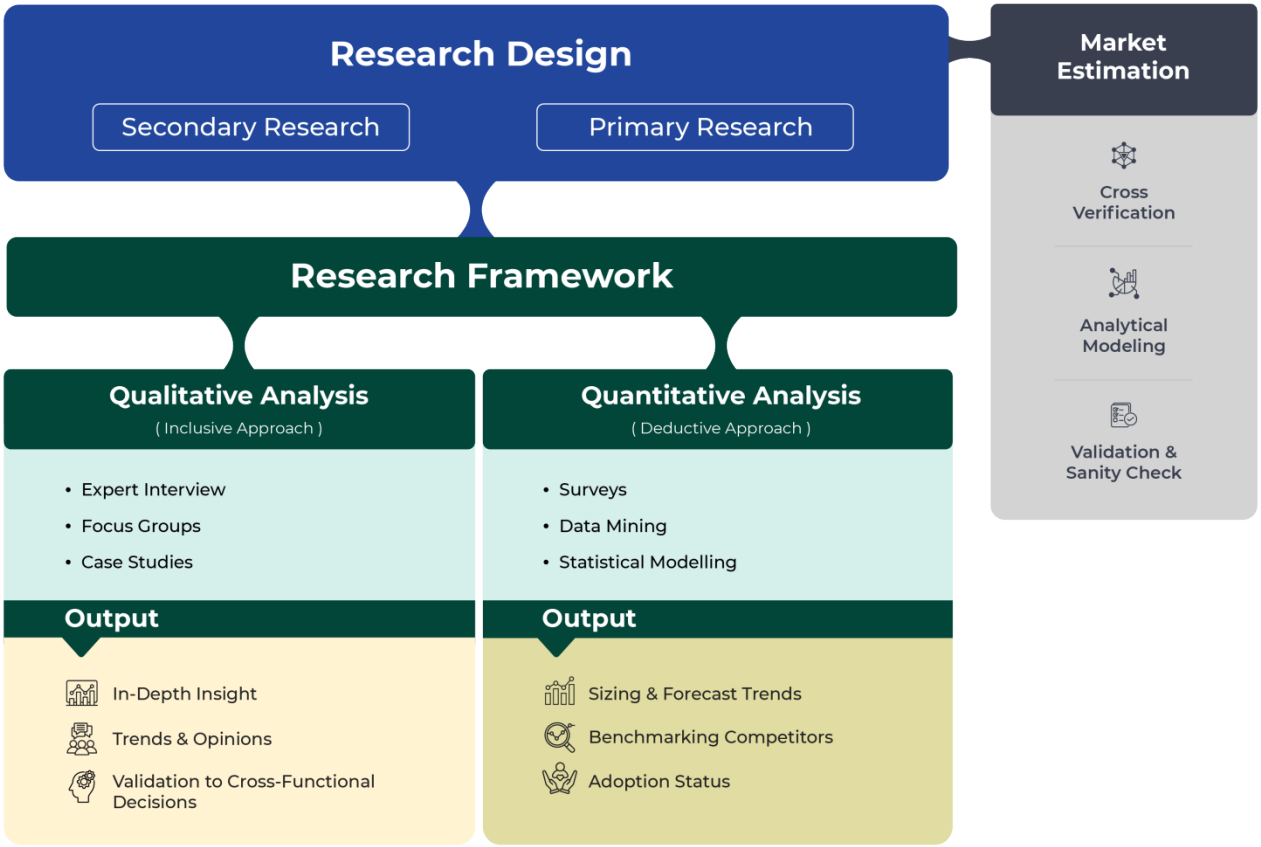
These roles do not imply that a particular record establishes every aspect of participation. An advertised offering does not by itself establish availability in every location, a commercial right does not establish buyer adoption, and an announcement does not establish a completed launch.

2.3. Research Framework

The definition fixes the Global commercial boundary, and the Offering hierarchy identifies what is supplied. Platform, immersion, purpose, audience, fulfillment, execution, connectivity, channel, revenue mechanism, genre, and participation then provide independent lenses for interpreting the same activity.

Commercial participation is a proposition to establish through an offering, business right, distribution relationship, or service commitment. Competitive interpretation follows from the actor's documented role and the buyer relationship it can access, rather than from professional prominence or association with Gaming alone.

Figure 3. Global Gaming Market, Research Framework



2.3.1. Qualitative Analysis

Qualitative analysis examines the commercial meaning of content rights, access entitlements, compatibility, renewal conditions, distribution control, and service continuity. These considerations are interpreted separately for content purchasers, access-service subscribers, device buyers, institutional purchasers, and advertisers.

A proposed switching barrier or channel advantage requires an explanation of which actor controls the relevant right or relationship and which buyer bears the consequence. Professional judgment can challenge that explanation, but cannot independently establish adoption or a numerical result.

2.3.2. Quantitative Analysis

Quantitative interpretation follows the Global boundary, uses USD on an absolute-value scale, and distinguishes the historical, base, estimated, and forecast period roles. The Offering hierarchy defines the commercial activities to which monetary interpretation must relate; the other segmentation axes describe those activities from different perspectives rather than creating additive opportunities.

Comparability depends on matching the offering, period, geography, commercial stage, and entitlement perimeter. A financial disclosure, player classification, or platform label cannot substitute for another measurement concept merely because both concern Gaming.

2.4. Market Size Estimation

A defensible monetary assessment of Gaming must correspond to the included offerings rather than entire technology or entertainment businesses. Software and content, play-access services, dedicated devices, peripherals, and advertising represent different commercial objects whose boundaries must remain visible.

The relevant control is consistency of the transaction and entitlement perimeter, particularly where an offering combines content, service access, and hardware. Qualitative explanations of buyer behavior remain hypotheses requiring independent numerical support; they do not become established quantitative inputs through repetition or expert authority.

2.4.1. Top-Down Approach

A top-down perspective serves as a scope-consistency check only when a broader commercial measure can be matched to the accepted Gaming perimeter. It must distinguish included offerings from adjacent computing, connectivity, entertainment, and advertising activities.

A software-only boundary is not interchangeable with this study's inclusion of play-access services, dedicated devices, peripherals and accessories, and game advertising. A broader measure with a different perimeter can provide context, but cannot determine conclusions for unmatched categories.

2.4.2. Bottom-Up Approach

A bottom-up perspective is meaningful only when identifiable offerings and commercial relationships can be attributed to the included Gaming activities. A developer, publisher, storefront, access provider, and device supplier can represent different positions in a player relationship; their descriptions are not automatically independent contributions.

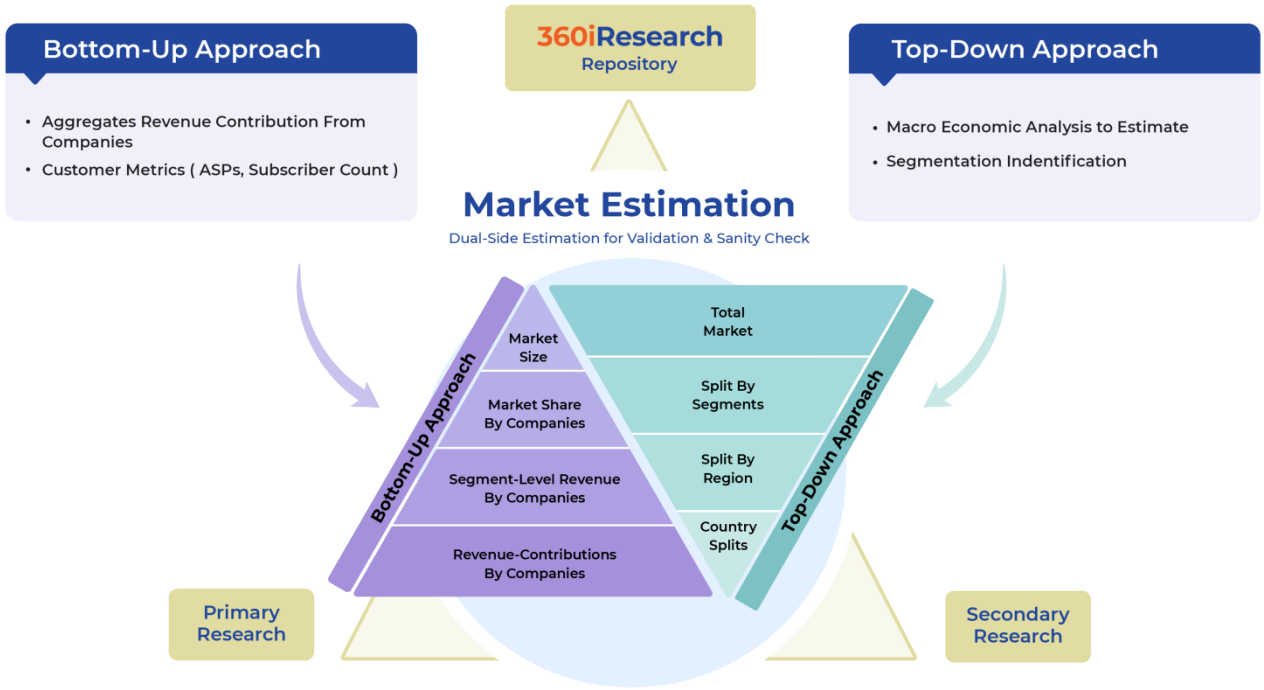
Cross-platform offerings, bundled access, and intermediary relationships therefore require consistent attribution. Multiple descriptions of an entitlement must not be mistaken for additional underlying activity, and a company's wider portfolio must not be attributed to Gaming solely through one relevant offering.

2.5. Data Triangulation

Convergence is persuasive only when the underlying claims concern compatible offerings, periods, geographies, and commercial stages. Repetition of the same underlying statement does not create independent corroboration, and agreement in category names does not resolve different entitlement boundaries.

Where evidence addresses different commercial objects, the individual comparison must remain qualified rather than forcing agreement. A mismatch limits the conclusion supported by that comparison; it does not remove an accepted category from the Gaming study.

Figure 4. Global Gaming Market, Data Triangulation



2.6. Research Outcomes

The intended outcome is a defensible basis for choosing which Gaming offerings, buyers, platforms, and commercial relationships warrant further commitment. The analysis should distinguish documented participation from announced intent, identify conditions affecting buyer access and switching, and explain the trade-offs among distribution, licensing, bundling, and service relationships.

Decision support remains conditional where commercial rights, entitlement boundaries, or jurisdictional availability are unsettled. A promising audience or technology category is not, by itself, evidence of an accessible or economically attractive business opportunity.

2.7. Research Assumptions

- Commercial entitlement: Comparisons assume that the benefit being supplied can be distinguished as game content, play access, a dedicated device, a peripheral or accessory, or game advertising. Similar branding does not make ownership, licensed content, and time-limited access interchangeable.
- Independent analytical lenses: Offering and the other segmentation axes describe different attributes of underlying activity. An offering appearing across several platforms, genres, or play modes does not create a separate additive opportunity under each label.
- Player and purchaser distinction: Player Age and Primary Play Purpose describe the play context rather than necessarily identifying the purchaser. Household, institutional, and advertiser decisions require their own buyer interpretation.

- Geographic applicability: Global participation does not imply identical commercial rights or availability in every jurisdiction. Access conclusions depend on the location and effective period to which the supporting right, offering, or distribution commitment applies.
- Continuity conditions: Business choices that depend on future releases, continuing content rights, or service support remain conditional on those commitments being fulfilled. An announced plan is distinguished from an offering available during the relevant study period.

2.8. Research Limitations

- Bundled entitlements and overlapping commercial stages: Where content, access, hardware, or cross-service benefits are combined, descriptions from producers and intermediaries may refer to overlapping activity. Such descriptions cannot establish separate contributions without a consistent entitlement and transaction perimeter.
- Mixed business perimeters: A disclosure combining included Gaming offerings with adjacent activities cannot establish the contribution of each offering merely through the reporting entity's identity. This limits company-to-company comparability without changing the accepted study boundary.
- Classification comparability: Genre, purpose, age, and platform labels can describe different aspects of an offering. Content ratings, account-holder characteristics, and intended audiences are not interchangeable evidence of who plays, while a genre label does not define a dedicated device's exclusive audience.
- Status and location specificity: A listing, announcement, authorization, or licensing relationship establishes only its stated commercial fact. It cannot alone demonstrate adoption, continued service, or availability in another jurisdiction or period.
- Period comparability: A release event, an ongoing access entitlement, and a reporting-period business disclosure describe different time relationships. Historical, base-year, estimated-year, and forecast interpretations require compatible period definitions rather than treating these observations as equivalent.

3. Executive Summary

3.1. Introduction

The Global Gaming market connects distinct customer rights and delivery commitments across Game Software & Content, Play-Access Services, Dedicated Gaming Devices, Gaming Peripherals & Accessories, and Game Advertising. Steam licenses content rather than transferring ownership of the underlying game, while NVIDIA Corporation's GeForce NOW adds remote execution and generally requires separate supported-store rights for paid games. Buyers must establish the intended title, account, device and territory before treating packages as substitutes.

Competition turns on control of these commercial relationships, not portfolio breadth alone. The Activision arrangement separates covered cloud-streaming rights held by Ubisoft Entertainment SA from Microsoft Corporation's publisher ownership, with different EEA and non-EEA rights routes. Providers should secure applicable streaming authority alongside customer entitlement before promising access. Neither publisher ownership nor device reach alone establishes a usable service catalog.

Sources & Evidence

1. Steam Subscriber Agreement
   · Steam grants a personal, noncommercial content license and states that content and services are licensed rather than sold. This supports distinguishing content entitlement from ownership. ([store.steampowered.com](https://store.steampowered.com/subscriber_agreement/))
2. GeForce NOW FAQs
   · GeForce NOW supplies streaming across supported devices and requires supported-store ownership or purchase for applicable paid games, with free-to-play alternatives and territorial restrictions. ([nvidia.com](https://www.nvidia.com/en-us/geforce-now/faq/))
3. Microsoft / Activision Blizzard (ex-cloud streaming rights) merger inquiry
   · The CMA's October xx.xx 2023 consent excluded Activision Blizzard's non-EEA streaming rights. Its record distinguishes Ubisoft's EEA rights and specified Microsoft licensing arrangements, supporting territory-specific counterparty selection. ([gov.uk](https://www.gov.uk/cma-cases/microsoft-slash-activision-blizzard-ex-cloud-streaming-rights-merger-inquiry))
4. Ubisoft Finalizes Cloud Streaming Rights Transaction with Activision Blizzard
   · Ubisoft's October xx.xx 2023 closing announcement establishes completed acquisition of covered streaming rights, distinguishing exclusive non-EEA and nonexclusive EEA rights from Microsoft's publisher acquisition. ([staticctf.ubisoft.com](https://staticctf.ubisoft.com/8aefmxkxpxwl/2BQerZVC87jjkgdSnMHq1w/0b626e4f3e5e0940841955cf8c3449d9/Ubisoft_Streaming_Announce_Press_Release_EN_Clean2.pdf))

3.2. CXO Perspective

PC-game publishers should separate distribution entry from audience acquisition. Valve Corporation's Steam admission requires an appropriately authorized contracting entity and review, while additional discovery depends on audience response rather than store traffic alone. Launch commitments should therefore address both publishing eligibility and title-specific audience fit; admission is not a demand guarantee.

Equipment retailers face a different capital and service choice. Nintendo Co., Ltd.'s UK guidance requires original Joy-Con controllers and compatible charging for Ring Fit Adventure on Nintendo Switch xx.xx; retaining suitable equipment can be preferable to full replacement. Fanatec's consumer guarantee separately limits qualifying purchase channels and applies bundle remedies to the affected product, not automatic whole-bundle replacement. Retailers should confirm compatible supply and remedy responsibility before promising a complete package, balancing assistance and continuing support against the customer's actual need.

These examples support offering-specific choices, not a verified supplier-wide substitution shortlist. For some private and regional candidates, current offerings and continuing delivery commitments remain unresolved. Directory entries and legacy legal terms alone are insufficient to establish substitution readiness; this limitation does not demonstrate nonparticipation or inferiority.

Sources & Evidence

1. Onboarding - Steamworks Documentation
   · Steam onboarding requires the contracting legal entity to own or hold publishing rights, provide matching legal and financial identity, accept the distribution agreement and complete review. These are admission conditions rather than evidence of demand. ([partner.steamgames.com](https://partner.steamgames.com/doc/gettingstarted/onboarding))
2. Ring Fit Adventure Q&A - Nintendo UK
   · Nintendo's UK Ring Fit Adventure guidance requires original Joy-Con controllers and a compatible charging arrangement on Nintendo Switch xx.xx because Joy-Con xx.xx does not fit the accessories. ([nintendo.com](https://www.nintendo.com/en-gb/Support/Purchases-Subscriptions/Games/Ring-Fit-Adventure-Q-A-xx.xx.html))
3. Visibility on Steam - Steamworks Documentation
   · Steam distinguishes baseline release visibility from additional discovery, identifies purchasing, play and language suitability as signals, and states that store-page traffic alone does not determine visibility. ([partner.steamgames.com](https://partner.steamgames.com/doc/marketing/visibility))
4. Fanatec Consumer Guarantee
   · Fanatec's guarantee names Corsair GmbH, covers qualifying direct or authorized-channel purchases, and limits bundle remedies to the affected individual product rather than full-bundle replacement. ([help.fanatec.com](https://help.fanatec.com/hc/en-us/articles/xx.xx-Fanatec-Consumer-Guarantee))
5. Puerto Rico Film Commission - Film Industry Contacts, April 2025
   · The April 2025 public directory lists video-game studios and business identities but does not identify a purchasable game or continuing delivery agreement. Its scope supports identity, not substitution readiness. ([discoverpuertorico.com](https://www.discoverpuertorico.com/sites/default/files/2025-xx.xx/PRFC_Film%20Industry%20Contacts_04-2025.pdf))
6. Terms of Service - Sandsoft
   · Sandsoft's undated terms identify Sandsoft International Tech Ltd and describe general game-service relationships without establishing a current named offering or ongoing trading continuity. Those matters remain unresolved by this document. ([sandsoft.com](https://sandsoft.com/terms-of-service/))

3.3. New Revenue Opportunities

Assessed revenue routes address defined buyer gaps: complementary direct and platform sales for game publishers; regional commerce and audience services for overseas rights holders; remote access for customers holding eligible games; and compatible equipment additions for households during console transitions. Minecraft Education provides an

administrator-facing licensing route, although existing coverage can make another purchase unnecessary. For agency buyers, Roblox placements require format-specific availability, audience suitability, reporting and applicable privacy permissions. These routes remain conditional on accessible rights, qualified counterparties and usable delivery, rather than establishing additional demand or assured outcomes. The Opportunity Mapping section provides the detailed assessment of access conditions and alternatives.

Sources & Evidence

1. GeForce NOW FAQs
   · GeForce NOW's separate content, supported-device and local-service requirements support a conditional remote-access proposition for holders of eligible games, not automatic additional demand. ([nvidia.com](https://www.nvidia.com/en-us/geforce-now/faq/))
2. Ring Fit Adventure Q&A - Nintendo UK
   · The documented ability to retain original compatible controllers supports assessing missing equipment additions rather than assuming a complete replacement purchase. ([nintendo.com](https://www.nintendo.com/en-gb/Support/Purchases-Subscriptions/Games/Ring-Fit-Adventure-Q-A-xx.xx.html))
3. Purchasing Options for Minecraft Education Licenses
   · Minecraft Education distinguishes academic eligibility and commercial licensing, identifies administrator purchasing routes, and advises schools to check existing coverage before purchasing. Both license types provide the same game features. ([edusupport.minecraft.net](https://edusupport.minecraft.net/hc/en-us/articles/xx.xx-Purchasing-Options-for-Minecraft-Education-Licenses))
4. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
   · The amended COPPA rule requires separate parental consent for covered nonintegral third-party disclosures, while necessary integral disclosures receive different treatment. Audience access therefore does not automatically establish disclosure permission. ([govinfo.gov](https://www.govinfo.gov/content/pkg/FR-2025-xx.xx-xx.xx/html/2025-xx.xx.htm))
5. Immersive Ads on Roblox
   · Roblox presents differentiated advertising formats, labels Homepage Feature as beta, and describes programmatic and managed-service purchasing and verification relationships. The offered routes do not establish campaign effectiveness or every buyer's access. ([brands.roblox.com](https://brands.roblox.com/advertising))
6. Nuuvem: Seu Jogo no Mercado Latinoamericano
   · Nuuvem advertises Latin American merchant-of-record, local-payment, key-management and Portuguese- and Spanish-support services. These offered functions support a conditional publisher-facing commerce opportunity. ([nuuvem.com](https://www.nuuvem.com/lp/pt/partners/))
7. Publishing - Carry1st
   · Carry1st advertises localization, alternative distribution, community engagement and tailored live operations for African game audiences. These are offered audience services rather than guaranteed outcomes. ([carry1st.com](https://carry1st.com/publishing))
8. Game Purchase - Factorio
   · Factorio's direct website purchase provides downloads and permits Steam-key redemption, establishing a named example of complementary direct and platform access. ([factorio.com](https://www.factorio.com/buy))

3.4. Next-Generation Business Models

Hybrid delivery is an established option rather than a hypothetical replacement of platforms. Wube Software's direct Factorio purchase provides downloads and permits Steam-key redemption. External Steam Keys, by contrast, change checkout while retaining Steam

activation and publisher key-management duties. Publishers can combine routes where rights and channel terms permit, but direct delivery leaves account administration and customer-support responsibilities to be addressed.

Modular regional entry is a conditional contracting option, not an established universal shift. Nuuvem advertises merchant-of-record, local-payment and bilingual-support services. Carry1st offers broader localization and continuing audience services, while Activision separately recognizes its Call of Duty: Mobile transaction role. Publishers should select the narrowest mandate covering their missing capability, adding broader publishing responsibilities only when needed and contracted. Wider outsourcing supplies additional services but delegates more control; an advertised capability does not establish another title's country rights or enforceable delivery commitments.

Sources & Evidence

1. Steam Keys - Steamworks Documentation
   · Steam Keys enable external-store or retail checkout while activating a Steam product license. Publishers retain key-management responsibilities, so checkout diversification does not remove the platform relationship. ([partner.steamgames.com](https://partner.steamgames.com/doc/features/keys))
2. Nuuvem: Seu Jogo no Mercado Latinoamericano
   · Nuuvem's specified commerce and bilingual-support functions provide an offered service mandate; the page does not establish negotiated rights or enforceable delivery for a proposed title. ([nuuvem.com](https://www.nuuvem.com/lp/pt/partners/))
3. Publishing - Carry1st
   · Carry1st's broader publishing services are distinct from a transaction-only appointment, supporting a conditional choice about mandate breadth. ([carry1st.com](https://carry1st.com/publishing))
4. Issues with COD Points Purchases for Call of Duty: Mobile - Activision Support
   · Activision lists Carry1st among Call of Duty: Mobile purchase vendors or payment processors, assigns unresolved purchase questions to the relevant provider, lists alternatives and warns of regional limitations. This establishes a transaction role, not blanket publishing rights. ([support.activision.com](https://support.activision.com/cod-mobile/articles/cod-points-purchases-call-of-duty-mobile))
5. Game Purchase - Factorio
   · Wube's website key upgrades the purchaser's account for direct downloads and permits Steam-key redemption; direct delivery and platform access therefore coexist for this offering. ([factorio.com](https://www.factorio.com/buy))

3.5. Industry Roadmap

For 2026-2027, distinguish effective distribution terms from scheduled service changes. Apple's EU terms effective October xx.xx 2026 permit qualifying alternative distribution while retaining notarization and commercial obligations. Mobile publishers should compare reachable audiences, agreements and transaction-support responsibilities before switching; company terms do not independently establish regulatory compliance. Microsoft's September xx.xx 2026 announcement schedules revised cloud access and a nonmember route for eligible owned-game streaming for November 2026. Bundle sellers should confirm applicable market, title and activation conditions before replacing a working entitlement.

For 2028-2029, regional expansion should follow confirmed country mandates and renewals rather than a regional label. Carry1st's offered services establish negotiable responsibilities, not

repeatable future delivery. Access providers should also reassess renewal promises against exact membership benefits: GeForce NOW's terms distinguish premium-use allowances, additional access and fallback features. Unproven delivery or a mismatch with customer needs favors a narrower commitment.

For 2030-2032, durable rights should be matched with continuing service and support commitments. Ubisoft Entertainment SA's acquired rights for covered Activision games persist beyond the future-release inclusion window, but do not guarantee a future catalog. Beat Saber's differing PlayStation and Steam support illustrates why retained play, multiplayer and new content require separate promises. License changes, renewals and official support notices should trigger reassessment rather than an assumed universal migration.

Sources & Evidence

1. Changes for Apps in the European Union - Apple Developer
   · Apple identifies unified EU terms effective October xx.xx 2026, qualifying alternative distribution, continued notarization and commercial obligations. Apple In-App Purchase supplies processing, tax and customer-support services. These company conditions are not independent findings of regulatory compliance. ([developer.apple.com](https://developer.apple.com/support/apps-in-the-eu/))
2. Beat Saber - FAQ
   · Beat Saber's PlayStation notice preserves previously purchased content while ending new content and multiplayer. Its separate Steam statement says music releases continue, demonstrating that retained play and continuing features can diverge by platform. ([beatsaber.com](https://beatsaber.com/faq.html))
3. Membership Terms for GeForce NOW
   · GeForce NOW's membership terms distinguish premium-use allowances, additional purchased access and free-feature fallback. Alliance-partner plans have their own terms. Future acceptance and renewal behavior are not established by the contract. ([nvidia.com](https://www.nvidia.com/en-us/geforce-now/membership-terms/))
4. Upcoming Changes to Xbox Cloud Gaming
   · Microsoft's September xx.xx 2026 announcement schedules revised subscription cloud access and a separate route for streaming eligible owned games without Game Pass beginning in November 2026. Market availability, eligible games and further purchasing details remain subject to subsequent disclosure. ([news.xbox.com](https://news.xbox.com/en-us/2026/xx.xx/xx.xx/xbox-cloud-gaming-changes/))
5. Ubisoft Finalizes Cloud Streaming Rights Transaction with Activision Blizzard
   · The announcement distinguishes the xx.xx-year future-release inclusion window from perpetual acquired rights and separates completion from subsequent work to bring games to Ubisoft+. It does not establish a future service catalog. ([staticctf.ubisoft.com](https://staticctf.ubisoft.com/8aefmxkxpxwl/2BQerZVC87jjkgdSnMHq1w/0b626e4f3e5e0940841955cf8c3449d9/Ubisoft_Streaming_Announce_Press_Release_EN_Clean2.pdf))
6. Publishing - Carry1st
   · The service portfolio establishes responsibilities available for negotiation, not evidence of repeatable delivery through future country mandates or renewals. The roadmap's expansion condition is an analytical implication. ([carry1st.com](https://carry1st.com/publishing))

4. Market Overview

4.1. Introduction

The Global Gaming market connects Game Software & Content, Play-Access Services, Dedicated Gaming Devices, Gaming Peripherals & Accessories, and Game Advertising through different commercial entitlements. Households purchase for themselves or other players, institutions acquire offerings for defined uses, and advertisers purchase game-related placements. ▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪

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Figure 5. Global Gaming Market Size, 2017-2040 (USD Million, Growth %)

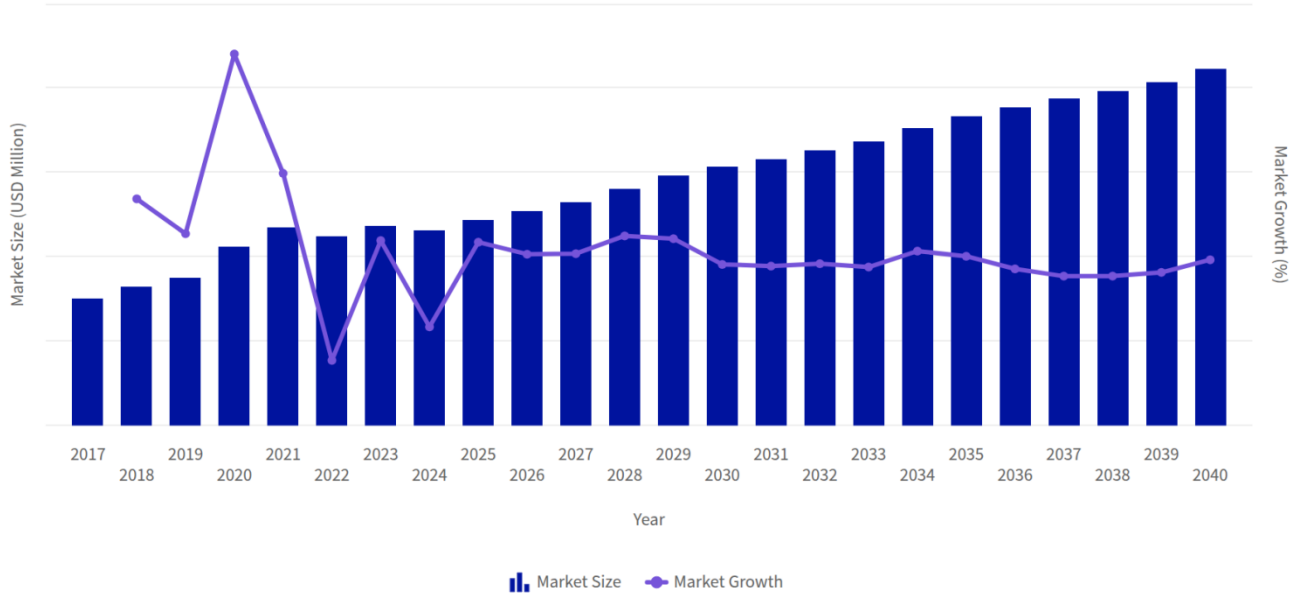

Table 2. Global Gaming Market Size, 2017-2040 (USD Million, Growth %)

Metric	2017	2024	2025	2026	2027	2032	2040
Market Size (USD Million)	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Market Growth (%)	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Sources & Evidence

1. Steam Subscriber Agreement
   · Steam grants a personal, noncommercial license and states that content and services are licensed rather than sold. ([store.steampowered.com](https://store.steampowered.com/subscriber_agreement/))
2. GeForce NOW FAQs
   · GeForce NOW requires ownership or purchase through a supported store for paid games and also supports free-to-play games. ([nvidia.com](https://www.nvidia.com/en-us/geforce-now/faq/))
3. Introducing Meta Quest 3S, Our Most Affordable Mixed Reality Headset
   · Meta's October xx.xx 2024 update stated that Quest 3S was available for purchase as a mixed-reality headset. ([about.fb.com](https://about.fb.com/news/2024/xx.xx/meta-quest-3s-our-most-affordable-mixed-reality-headset/))
4. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
5. FY26.1Q Supplemental Information
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
6. Microsoft Corporation 2025 Proxy Statement
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
7. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
8. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
9. Nintendo Co., Ltd. Annual Report 2021
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
10. Apple services enrich peoples' lives throughout the year
    · Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

4.2. Key Growth Contribution

Gaming adoption can be supported by making relevant content usable through an existing household relationship. Xbox Game Pass reduces separate selection decisions for included

games, while GeForce NOW adds supported-device access to eligible game entitlements. Serving this mechanism requires catalog relevance, clear account administration and a usable delivery commitment-not merely another subscription or endpoint. Membership-dependent catalogs, separate paid-game rights and local service conditions remain counterforces. Additional access can encourage consideration, but does not establish sustained engagement, renewal or an incremental purchasing decision.

Figure 6. Global Gaming Market, Key Growth Contribution, by Region, 2025-2032 (USD Million)

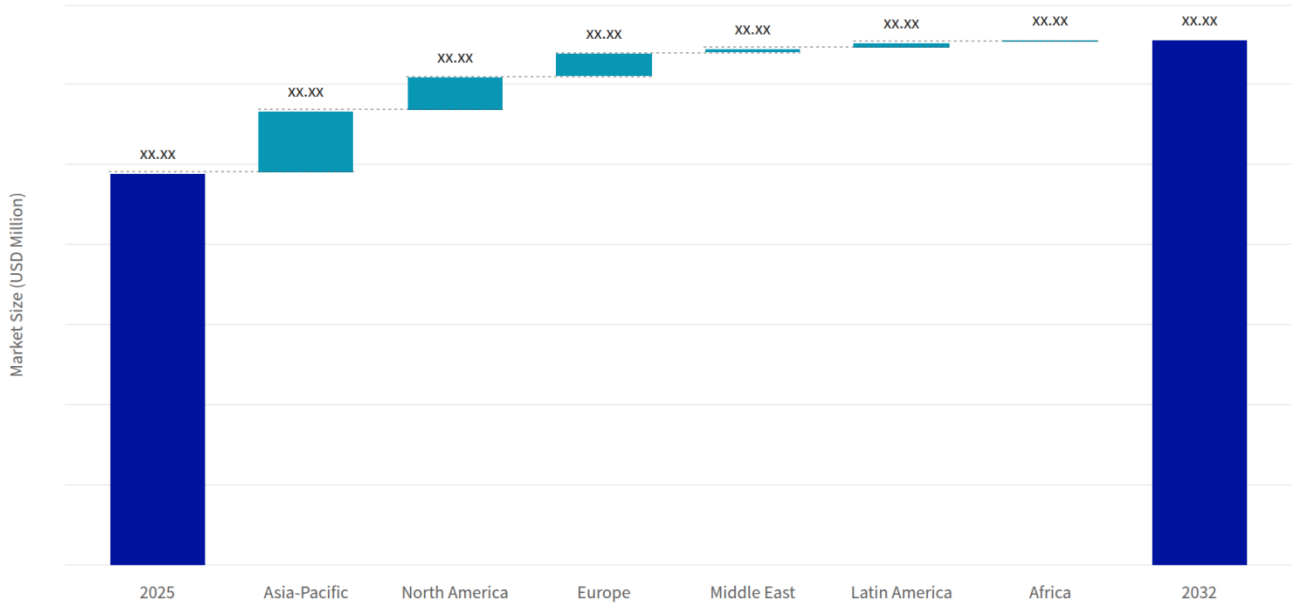

Figure 7. Global Gaming Market, Key Growth Contribution, by Country, 2025-2032 (CAGR %)

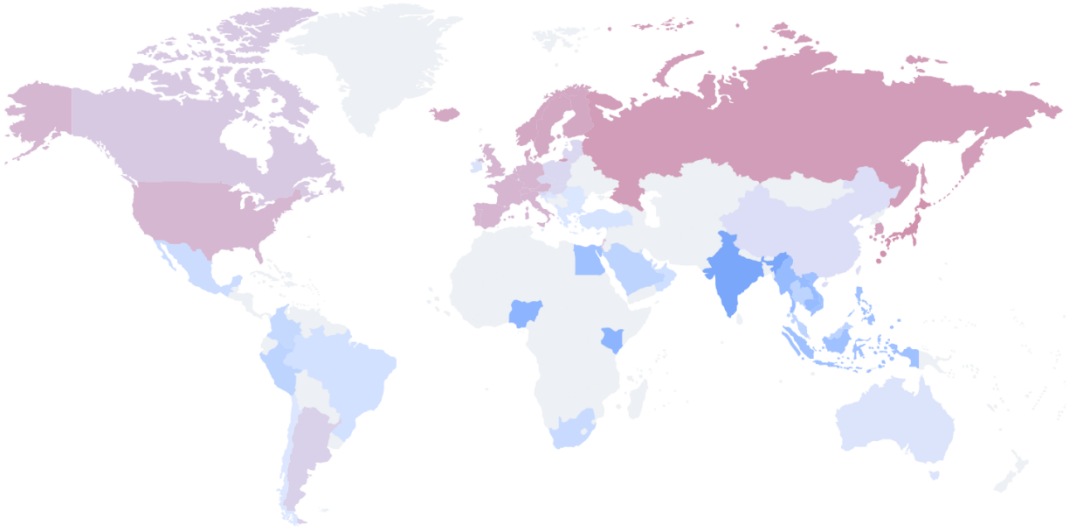

Table 3. Global Gaming Market, Key Growth Contribution, 2025-2032

Scope	Leading Category	Added Market Size (USD Million)	Growth Share (%)	CAGR (%)
Connectivity Requirement	xx.xx	xx.xx	xx.xx	xx.xx
Content Fulfillment Format	xx.xx	xx.xx	xx.xx	xx.xx
Country	xx.xx	xx.xx	xx.xx	xx.xx
Distribution Channel	xx.xx	xx.xx	xx.xx	xx.xx
Game Execution Model	xx.xx	xx.xx	xx.xx	xx.xx
Game Genre	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platform	xx.xx	xx.xx	xx.xx	xx.xx
Immersion Technology	xx.xx	xx.xx	xx.xx	xx.xx
Offering	xx.xx	xx.xx	xx.xx	xx.xx
Player Age	xx.xx	xx.xx	xx.xx	xx.xx
Player Participation	xx.xx	xx.xx	xx.xx	xx.xx
Primary Play Purpose	xx.xx	xx.xx	xx.xx	xx.xx
Region	xx.xx	xx.xx	xx.xx	xx.xx
Revenue Mechanism	xx.xx	xx.xx	xx.xx	xx.xx

Sources & Evidence

1. GeForce NOW FAQs

· GeForce NOW supports multiple device categories while requiring supported-store entitlements for paid games. Additional adoption opportunities remain conditional on usable access. ([nvidia.com](https://www.nvidia.com/en-us/geforce-now/faq/))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.

2. Xbox Game Pass - Plans and Features

· Game Pass supplies subscription-library access that depends on continuing membership and title inclusion; relevance to sampling and renewal is a conditional commercial inference. ([xbox.com](https://www.xbox.com/en-US/xbox-game-pass))

3. Microsoft Corporation 2025 Proxy Statement

· Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.

4. Measuring digital development: Facts and Figures 2025 - Internet use
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
5. United Nations World Statistics Pocketbook 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

6. Eurostat - Culture statistics: use of ICT for cultural purposes
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
7. Nintendo Co., Ltd. Annual Report 2026
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
8. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.

9. Tencent Announces 2025 Annual and Fourth Quarter Results
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
10. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
11. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.

12. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
13. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.
14. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
15. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
16. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.

17. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
18. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
19. Sony FY25.3Q Supplemental Information
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
20. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
21. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.

22. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
23. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
24. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
25. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.

26. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
27. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
28. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
29. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
30. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
31. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.

32. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
33. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
34. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
35. FY26.1Q Supplemental Information
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.

36. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
37. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
38. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.

39. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
40. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
41. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.

42. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
43. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
44. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
45. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
46. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
47. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.

48. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
49. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
50. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
51. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
52. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.

53. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
54. Street Fighter 6 on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
55. Capcom Q3 FY2025 Financial Results Presentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
56. Steam Keys - Steamworks Documentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
57. How to Set Parental Controls on PlayStation Consoles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.

58. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
59. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
60. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

4.3. Industry Ecosystem & Value Chain Analysis

Value creation begins with the right to publish and continues through the relationship that delivers the entitlement. ■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■ ■■ ■■■ ■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ A publisher should establish responsibility for distribution, customer support, and contractual remedies before comparing channel economics.

Cloud streaming adds a separate rights gate. ■■■ ■■■■■ ■■■■■■■ ■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■ ■■ ■ ■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■ ■■■■■■■■ ■■■■■■■ Cloud access providers must verify title, territory, and sublicensing rights independently of the player's content entitlement.

[illegible] Such a purchase requires usable goods as well as playable content. Content rights, equipment delivery, and replacement support should be distinguished in the commercial relationship rather than treated as automatically additive activities.

Sources & Evidence

1. Onboarding - Steamworks Documentation
   · Steam requires the contracting legal entity to own or hold publishing rights and sign its distribution agreement. ([partner.steamgames.com](https://partner.steamgames.com/doc/gettingstarted/onboarding))
2. Microsoft / Activision Blizzard (ex-cloud streaming rights) merger inquiry
   · The CMA granted acquisition consent on October xx.xx 2023 excluding Activision's non-EEA cloud streaming rights; its record describes Ubisoft's rights and a different nonexclusive EEA arrangement. ([gov.uk](https://www.gov.uk/cma-cases/microsoft-slash-activision-blizzard-ex-cloud-streaming-rights-merger-inquiry))
3. Ring Fit Adventure Q&A - Nintendo UK
   · Nintendo describes Ring Fit Adventure as a physical game card packaged with Ring-Con and leg-strap accessories. ([nintendo.com](https://www.nintendo.com/en-gb/Support/Purchases-Subscriptions/Games/Ring-Fit-Adventure-Q-A-xx.xx.html))

4.3.1. Supply-Side Analysis

Game Software & Content suppliers face a documented commercial onboarding process rather than an unrestricted publishing route. Steam requires publisher identity, payment and tax documentation, publishing rights, contractual acceptance, and review before release. [illegible]

[illegible] Outsourcing does not remove responsibility for delivery. Device and peripheral suppliers should confirm supplier commitments and channel obligations before promising availability, rather than using consumer interest as evidence of fulfillment capability.

Sources & Evidence

1. Onboarding - Steamworks Documentation
   · Onboarding includes identity, bank and tax information, contractual acceptance, and review before release.
2. Nintendo Annual Report 2026 - Fiscal Year Ended March 31, 2026
   · Nintendo states that outside companies produce key components and assemble finished products, and identifies inventory mismatch and supplier disruption risks. ([nintendo.co.jp](https://www.nintendo.co.jp/ir/pdf/2026/annual2603e.pdf))

4.3.2. Demand-Side Analysis

[illegible] Its catalog access also depends on membership and title availability. A purchaser must distinguish the desired game from the multiplayer or library entitlement; the player's age does not establish who controls the budget.

[illegible] The relevant buyer therefore includes the institution's license administrator, not only an interested teacher or student. Fitness-oriented purchasing can also require a complete equipment package, as illustrated by Ring Fit Adventure's game and accessories, rather than content alone.

Advertiser demand is tied to purchasable inventory and its commercial status. [illegible] Media buyers should verify the specific format and buying route before committing a campaign; interest in a gaming audience does not make every announced placement commercially available.

Sources & Evidence

1. Ring Fit Adventure Q&A - Nintendo UK
   - The offering requires a usable equipment package in addition to game content.
2. PlayStation Plus - Membership Features and Frequently Asked Questions
   - PlayStation distinguishes paid-game online membership conditions from most free-to-play games, and states that catalog access depends on membership and title end dates. ([playstation.com](https://www.playstation.com/en-us/ps-plus/))
3. Purchasing Options for Minecraft Education Licenses
   - Minecraft Education distinguishes academic and commercial licensing, specifies academic eligibility, and advises institutions to check existing licenses before purchasing. ([edusupport.minecraft.net](https://edusupport.minecraft.net/hc/en-us/articles/xx.xx-Purchasing-Options-for-Minecraft-Education-Licenses))
4. Roblox Expands Advertising Platform as Essential Channel for the Next Generations
   - Roblox's January xx.xx 2026 disclosure described Rewarded Video as available and its Homepage Feature as in closed beta. ([about.roblox.com](https://about.roblox.com/en-au/newsroom/2026/xx.xx/roblox-expands-advertising-platform))

4.3.3. Stakeholder Analysis

[illegible] Overseas rights holders need contracts allocating approval responsibility and operating duties, while the local counterparties' qualifications must match the intended activity. A commercial license alone does not demonstrate that allocation.

Creators also depend on platform-controlled payment eligibility. [illegible]

RESEARCH SAMPLE REPORT

[redacted] Creators should align continuing service commitments with the applicable payment conditions rather than assuming automatic convertibility.

Parents can control a separate permission gate from the player's wish to participate. [redacted] Operators and advertising counterparties should allocate responsibility for that permission, rather than assuming that every child who can play is an eligible advertising audience.

Sources & Evidence

1. NPPA - Approval of Internet Game Works Authorized by Overseas Copyright Holders
   · NPPA distinguishes an authorized publishing entity, copyright-contract registration, and an ICP-licensed operating entity.
   ([nppa.gov.cn](https://www.nppa.gov.cn/bsfw/xksx/cbfxl/wlcbfwspsx/xx.xx/t20221013_600723.html))
2. Developer Exchange Terms of Use - Roblox
   · Roblox Developer Exchange requires qualifying earnings, account and tax documentation, compliance, and discretionary cash-out review; requesting cash-out does not guarantee approval.
   ([en.help.roblox.com](https://en.help.roblox.com/hc/en-us/articles/xx.xx-Developer-Exchange-Terms-of-Use))
3. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
   · The final COPPA amendments require separate consent for covered nonintegral third-party disclosures and distinguish them from integral service disclosures.
   ([federalregister.gov](https://www.federalregister.gov/documents/2025/xx.xx/xx.xx/2025-xx.xx/childrens-online-privacy-protection-rule))

4.4. Market Dynamics

Gaming does not follow a single transition from purchased games to continuing services. [redacted] A successful release therefore does not establish continuing demand for associated add-ons or services.

[redacted] This can place game access within an existing telecom relationship, while migration and eligibility conditions introduce friction. Bundle activation and account continuity are more informative commercial triggers than assuming that inclusion automatically produces additional play or spending.

Sources & Evidence

1. Sony Group Form 20-F - Fiscal Year Ended March 31, 2026
   · Sony describes plans for consistent single-player releases alongside building a live-service portfolio; these are stated plans, not proof of execution.
   ([sony.com](https://www.sony.com/en/SonyInfo/IR/library/FY2025_20F_PDF.pdf))

2. Get Xbox Game Pass Ultimate on EE
   · EE describes Game Pass Ultimate as an Inclusive Extra, add-on, or monthly subscription linked to a Microsoft account. ([ee.co.uk](https://ee.co.uk/help/gaming/how-do-i-get-xbox-game-pass-ultimate-on-ee))

4.4.1. Key Drivers

4.4.1.1. Library access supports conditional game discovery

Game-Library Access can reduce the need to make a separate purchasing decision for every included title. ■■■■ ■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■■■ Access providers should treat catalog relevance, entitlement conditions, and renewal decisions as separate commercial questions.

Sources & Evidence

1. Xbox Game Pass - Plans and Features
   · Xbox describes Game Pass library access and automatically continuing subscriptions. Encouraging sampling is a conditional inference, not an observed adoption conclusion. ([xbox.com](https://www.xbox.com/en-US/xbox-game-pass))

4.4.1.2. Cross-device access separates play access from dedicated hardware

■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ This can create additional occasions to use or acquire supported games without a dedicated console purchase. The mechanism remains conditional on title eligibility, supported devices, and usable connectivity; it does not make general-purpose devices part of Dedicated Gaming Devices.

Sources & Evidence

1. GeForce NOW FAQs
   · NVIDIA describes supported computer, mobile, and selected TV access while preserving the underlying supported-store entitlement requirement. Additional purchasing occasions are a conditional inference.

4.4.1.3. Established media-buying channels support game advertising consideration

Google's April 2025 Roblox partnership announcement connected immersive advertising to established advertising purchasing systems. Roblox's January 2026 disclosure subsequently described Rewarded Video as available while its new Homepage Feature remained in closed beta. ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■■■■ ■■■■■■ ■■ ■■■■■■■■■ ■■■ ■■■■■■■ ■ ■■■■■■■■■■■ ■■■ ■ ■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■■■

Sources & Evidence

1. Roblox Expands Advertising Platform as Essential Channel for the Next Generations
   · Roblox described its foundational Google relationship and differentiated available advertising from a beta format; easier procurement and adoption remain separate propositions.

2. Immersive Ads Are Expanding, Starting With a New Partnership Between Ad Manager and Roblox
   · Google announced its Ad Manager partnership with Roblox on April xx.xx 2025, describing an expansion of immersive advertising formats and purchasing access. ([blog.google](https://blog.google/products/ads-commerce/immersive-ads-roblox/))

4.4.1.4. Compatible XR devices preserve the relevance of existing content

[redacted] Library continuity can make a new Gaming XR Headset relevant to existing content holders rather than requiring an entirely new content relationship. Purchase response remains conditional on household interest and title compatibility; an additional device offering does not establish replacement demand or publisher profitability.

Sources & Evidence

1. Introducing Meta Quest 3S, Our Most Affordable Mixed Reality Headset
   · Meta described Quest 3S as compatible with its existing application and game library. Purchase relevance to existing content holders is a conditional commercial inference.

4.4.2. Key Restraints

4.4.2.1. Territorial authorization limits transferable market access

Mainland China's imported online-game approval route requires an appropriately licensed publisher, registered copyright authorization, an ICP-licensed operator, and NPPA approval. [redacted] Participation depends on the exact title authorization and contractual allocation of local duties; selecting a qualified counterparty does not itself establish approval, audience demand, or attractive economics.

Sources & Evidence

1. NPPA - Approval of Internet Game Works Authorized by Overseas Copyright Holders
   · The imported online-game route requires these qualifications and approval through provincial review and NPPA authorization.

4.4.2.2. Child-specific rules constrain audience monetization assumptions

[redacted] These conditions limit monetization or engagement assumptions for affected audiences, not all Gaming activity. Adult users, offline offerings, and noncovered data uses require separate treatment.

Sources & Evidence

1. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
   · The amended rule became effective June xx.xx 2025; the general compliance deadline was April xx.xx 2026. Covered targeted-advertising disclosures require separate parental consent. ([federalregister.gov](https://www.federalregister.gov/documents/2025/xx.xx/xx.xx/2025-xx.xx/childrens-online-privacy-protection-rule))

2. NPPA - Questions and Answers on Further Strict Management to Prevent Minors' Addiction to Online Games
   - NPPA's August 2021 explanation describes restricted online-game service periods for minors and explicitly distinguishes online games from other games. ([nppa.gov.cn](https://www.nppa.gov.cn/xxgk/zcjd/xx.xx/t20210830_4759.html))

4.4.2.3. Discretionary budgets and competing entertainment constrain demand

EA identifies discretionary consumer spending and competing entertainment preferences as business risks. ■■■■■■ ■■ ■ ■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■ ■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■ ■■ ■■■■■■■ ■■■■■■■■■ Suppliers should distinguish a compelling title or service benefit from category participation, particularly when renewal or add-on purchasing depends on sustained interest.

Sources & Evidence

1. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
   - EA identifies adverse discretionary-spending conditions and competing entertainment preferences as risks, not a universal demand outcome. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ea-xx.xx.htm))

4.4.3. Key Opportunities

4.4.3.1. Regional commerce services matched to a specific operating gap

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Sources & Evidence

1. Nuuvem: Seu Jogo no Mercado Latinoamericano
   - Nuuvem advertises merchant-of-record services, local payments, and Portuguese and Spanish support, establishing an offered regional service package rather than a negotiated mandate. ([nuuvem.com](https://www.nuuvem.com/lp/pt/partners/))

4.4.3.2. Complete-package support during equipment transitions

Retailers can address console-transition uncertainty by supplying the missing elements of a usable package rather than assuming complete replacement. Ring Fit Adventure on Nintendo Switch xx.xx requires original Joy-Con controllers and an appropriate charging arrangement. ■■■ ■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■ ■ ■■■■■■■■ ■■■■■■■■■■■ ■■ ■ ■■■■■■■ ■■■■■■■

Sources & Evidence

1. Ring Fit Adventure Q&A - Nintendo UK
   - Nintendo's UK guidance requires original Joy-Con controllers and a compatible charging arrangement for Ring Fit Adventure on Nintendo Switch xx.xx. ([nintendo.com](https://www.nintendo.com/en-gb/Support/Purchases-Subscriptions/Games/Ring-Fit-Adventure-Q-A-xx.xx.html))

4.4.3.3. Remote access for holders of eligible game entitlements

[redacted] Capture requires the intended title, supported store, device and territorial operator to coincide. Local execution remains preferable where existing equipment meets the need or service dependencies make streaming unsuitable.

Sources & Evidence

1. GeForce NOW FAQs
   - GeForce NOW separates remote execution from paid-game acquisition and distinguishes directly served territories from Alliance-partner territories. ([nvidia.com](https://www.nvidia.com/en-us/geforce-now/faq/))

4.4.3.4. Institutional access aligned with eligibility and existing coverage

Educational-game suppliers can address purchasing and administration needs around established institutional entitlements. Minecraft Education distinguishes academic and commercial routes and advises schools to check existing coverage. [redacted]

Sources & Evidence

1. Purchasing Options for Minecraft Education Licenses
   - Minecraft Education distinguishes academic and commercial eligibility and advises schools to check existing licenses. ([edusupport.minecraft.net](https://edusupport.minecraft.net/hc/en-us/articles/xx.xx-Purchasing-Options-for-Minecraft-Education-Licenses))

4.4.3.5. Defined advertising placements with explicit procurement commitments

[redacted] A commitment requires placement-specific availability, audience suitability and reporting through the intended buying route. An announced format or familiar procurement system is insufficient evidence of campaign effectiveness.

Sources & Evidence

1. Roblox Expands Advertising Platform as Essential Channel for the Next Generations
   - Roblox's January xx.xx 2026 announcement distinguished available Rewarded Video from closed-beta Homepage Feature. ([about.roblox.com](https://about.roblox.com/newsroom/2026/xx.xx/roblox-expands-advertising-platform))

4.4.4. Key Challenges

4.4.4.1. Store admission does not secure sustained discovery

[illegible] Store-page traffic alone does not determine visibility. Publishers must connect launch spending to actual audience interest and language suitability rather than treating platform approval or page visits as evidence of sustained exposure.

Sources & Evidence

1. Visibility on Steam - Steamworks Documentation
   - Steam distinguishes baseline release visibility from additional discovery; purchasing, play, supported languages, and preferences matter, while store-page traffic alone does not determine visibility. ([partner.steamgames.com](https://partner.steamgames.com/doc/marketing/visibility))

4.4.4.2. Continuing play can depend on service support after purchase

[illegible] This illustrates a continuity exposure rather than establishing the same outcome for every game. Suppliers should define service-end obligations and purchasers should verify continuing play conditions; Offline Play offerings have a different dependency.

Sources & Evidence

1. Anthem Game Update - EA
   - EA's Anthem notice says the online-only game would no longer be playable when servers closed, even for previous purchasers. This supports the announced dependency, not independent verification of the closure event. ([ea.com](https://www.ea.com/security/news/anthem-game-update))

4.4.4.3. Hardware transitions complicate complete-package compatibility

[illegible] Retailers must verify the complete usable package during a console transition. Content compatibility does not establish accessory equivalence, although retaining compatible older controllers can avoid replacing the entire relationship.

Sources & Evidence

1. Ring Fit Adventure Q&A - Nintendo UK
   - Nintendo's UK guidance says Joy-Con xx.xx controllers do not fit the accessories, original Joy-Con controllers are needed on Nintendo Switch xx.xx and separate charging equipment can be required.

4.4.4.4. Bundle migration requires clear account and billing ownership

EE's Game Pass guidance requires Microsoft-account activation and says an existing subscription may need cancellation during migration. [illegible] Channel partners should clarify eligibility, activation, and cancellation responsibilities before selling the

benefit; standalone access avoids that particular dependency but may not provide the same bundle entitlement.

Sources & Evidence

1. Get Xbox Game Pass Ultimate on EE
   - EE's guidance includes account activation and prompts customers with an existing subscription to cancel it during migration.

4.5. Porter’s Five Forces Analysis

[redacted] A household can therefore change its content choice without buying the same service entitlement. Paid-game and access-service suppliers must demonstrate a benefit that available alternatives do not provide.

Licensors can constrain the commercial choices of branded-game publishers. EA identifies sports-league, team, player-association, and Disney rights in its portfolio. [redacted]

Consumer choice does not necessarily translate into negotiating power over account terms. Steam supplies content under a personal-use license rather than transferring ownership of the underlying content. [redacted]

Entry barriers differ between content publishing and supplying a gaming platform or device. [redacted] Store admission also does not establish sustained discovery.

Distribution gatekeeping is contestable, but alternative routes remain conditional. The European Commission found Apple's anti-steering terms noncompliant in April 2025. [redacted]

Sources & Evidence

1. Steam Subscriber Agreement
   - Steam's standard entitlement is a content license, supporting the distinction between consumer selection and ownership or institutional-use rights.
2. Onboarding - Steamworks Documentation
   - Steam documents a qualifying publisher's distribution-entry route; this does not establish audience demand.

3. Nintendo Annual Report 2026 - Fiscal Year Ended March 31, 2026
   · The disclosed physical-supply dependencies support distinguishing device-entry obligations from publisher onboarding.
4. PlayStation Plus - Membership Features and Frequently Asked Questions
   · Most free-to-play titles such as Fortnite do not require PlayStation Plus, supporting the presence of different access alternatives rather than a universal service requirement.
5. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
   · EA identifies licensed sports-league, team, player-association, and Disney rights and describes competition for licenses. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ea-xx.xx.htm))
6. Visibility on Steam - Steamworks Documentation
   · Documented baseline visibility does not establish sustained discovery for a particular entrant.
7. Commission Finds Apple and Meta in Breach of the Digital Markets Act
   · On April xx.xx 2025, the European Commission found Apple's App Store anti-steering terms noncompliant with the DMA. ([digital-strategy.ec.europa.eu](https://digital-strategy.ec.europa.eu/en/news/commission-finds-apple-and-meta-breach-digital-markets-act))
8. Changes for Apps in the European Union - Apple Developer
   · Apple describes EU alternative distribution, continued notarization, and business terms effective October xx.xx 2026 that include commissions on qualifying digital transactions outside the App Store. The page establishes company conditions, not regulatory compliance. ([developer.apple.com](https://developer.apple.com/support/apps-in-the-eu/))

4.6. PESTLE Analysis

Territorial publishing policy can determine the release sequence independently of a game's international distribution capability. ■■■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ An overseas rights holder therefore needs an applicable local approval arrangement rather than treating a Global release announcement as permission to operate in Mainland China.

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■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■ ■ ■■■■■■■■ ■■■■ ■■■■ ■■■■ ■■■■■■■■ Sony's filing for the fiscal year ended March 2026 identifies PlayStation hardware with Blu-ray functionality as dependent on patents licensed through Via Licensing Alliance.

Content rights and equipment patent rights are consequently separate clearance questions; a content license cannot establish the right to supply every associated device feature.

Environmental obligations create an additional market-access layer for electrical gaming equipment. EU WEEE guidance requires relevant manufacturers, distributors, and sellers to address national registration and equipment collection or recovery responsibilities. ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■ ■■■ ■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■ ■■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■ ■■ ■■■■■■■ ■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■■■

Sources & Evidence

1. NPPA - Approval of Internet Game Works Authorized by Overseas Copyright Holders
   · Territorial publishing and operating requirements are distinct from international rights ownership or distribution capability.
2. Sony Group Form 20-F - Fiscal Year Ended March 31, 2026
   · Sony identifies Blu-ray-enabled PlayStation hardware as dependent on relevant patents licensed through Via Licensing Alliance. ([sony.com](https://www.sony.com/en/SonyInfo/IR/library/FY2025_20F_PDF.pdf))
3. Nintendo Financial Results Briefing for Fiscal Year Ended March 2025 - Q&A Summary
   · Nintendo's May 2025 briefing discusses recognizing tariff costs while balancing commercial changes against new-platform momentum. It does not establish currently applicable duties. ([nintendo.co.jp](https://www.nintendo.co.jp/ir/pdf/2025/250509e.pdf))
4. WEEE Responsibilities - Your Europe
   · EU WEEE guidance identifies national registration, collection and recovery responsibilities, distributor take-back, and collective or individual compliance schemes for relevant electrical equipment. ([europa.eu](https://europa.eu/youreurope/business/product-rules-compliance/recycling-waste-management/weee-responsibilities/index_en.htm))
5. Consumer Protection Cooperation Network's Key Principles on In-Game Virtual Currencies
   · The March xx.xx 2025 CPC principles concern purchased in-game virtual currencies, transaction information, contractual fairness, withdrawal rights, and vulnerable consumers. Gameplay-only currencies are excluded, and individual legality remains for competent authorities and courts. ([commission.europa.eu](https://commission.europa.eu/document/download/8af13e88-xx.xx-436c-b137-9853e7fe866a_en?filename=Key+principles+on+in-game+virtual+currencies.pdf))

4.7. Market Outlook

The Global Gaming outlook depends on the ability to sustain a usable entitlement, not a uniform shift toward subscriptions or remote execution. Game Pass's membership-and-catalog conditions coexist with households' title-specific requirements, while PlayStation's free-to-play multiplayer exceptions challenge assumptions that every online player needs another paid membership. ■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■ ■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■ ■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■

Commercial access remains necessary but insufficient. ■■■■■ ■■■■■■■■■ ■■■■ ■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■

[redacted] These events should determine commitment and renewal decisions rather than category participation alone.

Sources & Evidence

1. PlayStation Plus - Membership Features and Frequently Asked Questions
   · PlayStation distinguishes most purchased-game online membership requirements from most free-to-play multiplayer titles, providing a counterforce to assuming universal demand for another paid access entitlement. ([playstation.com](https://www.playstation.com/en-us/ps-plus/))
2. Roblox Expands Advertising Platform as Essential Channel for the Next Generations
   · Roblox's dated disclosure establishes differentiated advertising statuses, not campaign effectiveness or automatic availability of every announced format. ([about.roblox.com](https://about.roblox.com/newsroom/2026/xx.xx/roblox-expands-advertising-platform))
3. Xbox Game Pass - Plans and Features
   · Game Pass states that catalog access ends when membership expires or a game leaves, supporting a distinction between library access and a persistent title-specific requirement. ([xbox.com](https://www.xbox.com/en-US/xbox-game-pass))
4. Visibility on Steam - Steamworks Documentation
   · Steam distinguishes baseline release visibility from additional discovery and states that store-page traffic alone does not determine visibility. ([partner.steamgames.com](https://partner.steamgames.com/doc/marketing/visibility))

4.7.1. Near-Term Market Outlook (0-2 Years)

[redacted] Households and bundle sellers should reassess at activation and renewal when market eligibility, supported games and final terms are confirmed. Deferring a migration is preferable to replacing a working entitlement with a benefit that has not become available to the intended customer.

EU mobile publishers face an already-effective agreement decision under Apple's terms of October xx.xx 2026. [redacted] The relevant indicators are marketplace acceptance, contractual support allocation and changes in operative terms; Apple's statement of conditions does not independently establish regulatory compliance or a commercial advantage.

Sources & Evidence

1. Changes for Apps in the European Union - Apple Developer
   · Apple's EU terms effective October xx.xx 2026 retain notarization and commercial obligations while allowing alternative distribution. Apple In-App Purchase includes processing, tax support and customer service; alternatives change that relationship. ([developer.apple.com](https://developer.apple.com/support/apps-in-the-eu/))
2. Upcoming Changes to Xbox Cloud Gaming
   · Microsoft's September xx.xx 2026 announcement schedules revised subscription cloud access and an owned-game streaming route without Game Pass for November 2026; market-specific eligibility remains material. ([news.xbox.com](https://news.xbox.com/en-us/2026/xx.xx/xx.xx/xbox-cloud-gaming-changes/))

4.7.2. Medium-Term Market Outlook (3-5 Years)

For 2028-2029, the regional expansion case should turn on whether service mandates remain useful through renewal. ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■■ ■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■ ■■■ ■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■ ■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ Renewal, an accepted country-specific mandate or a change in support ownership should trigger expansion or retrenchment; retaining a narrower appointment remains an alternative.

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Sources & Evidence

1. Membership Terms for GeForce NOW
   · GeForce NOW membership terms distinguish included premium access, additional purchased time and free-member fallback. Renewal responses are not established by these terms. ([nvidia.com](https://www.nvidia.com/en-us/geforce-now/membership-terms/))
2. Publishing - Carry1st
   · Carry1st advertises localization, alternative distribution, community engagement and continuing live-operations services. Repeatable commercial delivery through future renewals remains conditional. ([carry1st.com](https://carry1st.com/publishing))

4.7.3. Long-Term Market Outlook (5-10 Years)

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surviving permission and delivery obligation, not infer that an old transaction guarantees a future catalog. Changes in applicable licenses or a supplier's service commitment would alter that assessment.

Long-term access is also unlikely to be adequately described by a single connected-versus-owned choice. GOG's optional-client and offline-installer model and Wube Software's coexistence of direct Factorio downloads with Steam access provide supported alternatives. ■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■ ■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■

Sources & Evidence

1. Beat Saber - FAQ
   · The notice demonstrates that continuing play, new releases and multiplayer support can diverge, supporting distinct long-term support promises rather than a universal shutdown assumption. ([beatsaber.com](https://beatsaber.com/faq.html))
2. Introduction - GOG Developer Docs
   · GOG documents an optional client and offline installers, providing a counterexample to assuming every gaming entitlement requires continuing remote-service access. ([docs.gog.com](https://docs.gog.com/introduction/))
3. Activision Blizzard Cloud Game Streaming in the EEA
   · Microsoft distinguishes the period for offering commitment-based licenses from the continuing duration of licenses taken during that period; historical rights do not establish future service availability. ([xbox.com](https://www.xbox.com/en-US/legal/activision-blizzard-cloud-game-streaming-eu))
4. Ubisoft Finalizes Cloud Streaming Rights Transaction with Activision Blizzard
   · Ubisoft's October xx.xx 2023 closing announcement distinguishes the xx.xx-year future-release inclusion window from perpetual acquired streaming rights and separates EEA from non-EEA rights. ([staticctf.ubisoft.com](https://staticctf.ubisoft.com/8aefmxkxpxwl/2BQerZVC87jjkgdSnMHq1w/0b626e4f3e5e0940841955cf8c3449d9/Ubisoft_Streaming_Announce_Press_Release_EN_Clean2.pdf))
5. Game Purchase - Factorio
   · Factorio's direct-download and Steam-redemption arrangement supplies a counterexample to a necessary choice between entirely direct and entirely platform-based access. ([factorio.com](https://www.factorio.com/buy))

4.8. Go-to-Market Strategy

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[illegible] Sequence the business decisions as rights and country confirmation, counterparty selection, allocation of content approval and support, and then a release commitment. The broader mandate delegates more control and should not be selected merely because the supplier advertises regional experience.

Equipment retailers should target the customer's intended game and existing components before proposing a console transition or accessory package. [illegible] Confirm authorized supply and availability before making a bundle promise.

Institutional Minecraft Education offers should address the license administrator rather than rely solely on player or teacher interest. [illegible] This avoids confusing access administration with demand for another game license.

Telecom partners should sell a supported activation and management relationship rather than inclusion alone. EE's Game Pass route illustrates why Microsoft-account activation and migration from an existing subscription need named ownership. [illegible]

Sources & Evidence

1. Onboarding - Steamworks Documentation
   · Steam admission requires an appropriately identified contracting entity with adequate publishing rights, banking and tax information, agreement acceptance and review. ([partner.steamgames.com](https://partner.steamgames.com/doc/gettingstarted/onboarding))
2. Get Xbox Game Pass Ultimate on EE
   · EE's Game Pass guidance requires Microsoft-account activation and describes cancellation and repurchase when an existing subscription moves into EE management. ([ee.co.uk](https://ee.co.uk/help/gaming/how-do-i-get-xbox-game-pass-ultimate-on-ee))
3. Visibility on Steam - Steamworks Documentation
   · Steam's visibility documentation supports separating distribution admission from audience development and using title interest rather than traffic alone to assess launch commitments. ([partner.steamgames.com](https://partner.steamgames.com/doc/marketing/visibility))
4. Steam Refunds
   · Valve's refund policy excludes third-party keys purchased outside Steam, so external checkout requires a separately understood seller-remedy relationship. ([store.steampowered.com](https://store.steampowered.com/steam_refunds/))

5. Steam Keys - Steamworks Documentation
   · Steam Keys activate a Steam product license after external checkout; publishers retain distribution responsibilities, and additional key requests are not guaranteed. ([partner.steamgames.com](https://partner.steamgames.com/doc/features/keys))
6. Compatibility with Nintendo Switch Games - Nintendo UK
   · Nintendo separately documents original Joy-Con and charging dependencies for Ring Fit Adventure on Nintendo Switch xx.xx. ([nintendo.com](https://www.nintendo.com/en-gb/Hardware/Nintendo-Switch-xx.xx/Compatibility-with-Nintendo-Switch-games-xx.xx.html))
7. Services - Tamatem Games
   · Tamatem offers cultural localization and community support, supporting a conditional broader appointment when translation alone does not address the publisher's responsibilities. ([tamatem.co](https://tamatem.co/service))
8. Manage Licenses in the Admin Center - Minecraft Education
   · Minecraft Education's administration guidance requires licenses to be assigned to users and describes access included through applicable Microsoft xx.xx education arrangements. ([edusupport.minecraft.net](https://edusupport.minecraft.net/hc/en-us/articles/xx.xx-Manage-Licenses-in-the-Admin-Center))

5. Market Insights

5.1. Consumer Insights & End-User Perspective

Gaming's user and purchasing approver can be different people. ■■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■ ■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■■■ ■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ The relevant household proposition includes clear content, communication and spending controls; this account arrangement should not be generalized to every household.

Learning & Education purchasing requires license eligibility rather than demonstrated interest alone. Minecraft Education provides the same game features under academic and commercial licenses, but distinguishes eligibility and purchase administration. ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■ ■■■ ■■■■■■ ■■■■■ ■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■

Fitness & Physical Activity purchases can require a complete usable equipment package. Nintendo's UK Ring Fit Adventure guidance identifies original Joy-Con and charging dependencies on Nintendo Switch xx.xx. ■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■ ■■■■■■■■■■ ■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■

Advertisers buy a defined placement rather than general participation in a gaming audience. ■■■■■■■■ ■■■■■■■ ■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■ ■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ Neither availability nor beta participation establishes effectiveness for a particular advertiser.

Sources & Evidence

1. Ring Fit Adventure Q&A - Nintendo UK
   · Nintendo's UK guidance describes Ring Fit Adventure as a game-and-accessory package and identifies original Joy-Con and charging dependencies when using Nintendo Switch xx.xx.
2. Purchasing Options for Minecraft Education Licenses
   · Minecraft Education distinguishes academic eligibility and commercial licensing while providing the same game features; eligible institutions can purchase through administrators or licensing partners and should check existing entitlements.
3. Roblox Expands Advertising Platform as Essential Channel for the Next Generations
   · Roblox's January xx.xx 2026 disclosure described Rewarded Video as available and its Homepage Feature as in closed beta; the disclosure does not establish campaign effectiveness.
4. How to set parental controls on PlayStation consoles
   · PlayStation documents that child-account purchases use the family manager's wallet and that parents or guardians can control spending and access permissions.

5.2. Consumer Experience Benchmarking

Play-Access Services should be compared on title access, continuity and service conditions rather than assumed platform preference. PlayStation Plus catalog access depends on membership and some titles leave the service. ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪

Remedies also depend on the purchase route. ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ Buyers should compare the actual seller's remedies and manufacturer support rather than treating new, refurbished and used listings as equivalent.

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The ESA's March 2025 Accessible Games Initiative introduced voluntary tags for capabilities such as narrated menus and clear subtitles, with company-specific implementation. Households and educational purchasers can use disclosed features to screen titles against their needs, but a tag does not establish suitability for every player or compatibility with every peripheral.

Sources & Evidence

1. GeForce NOW FAQs
   - GeForce NOW generally requires a supported-store entitlement for paid games and differentiates streaming access and waiting conditions by membership.
2. PlayStation Plus - Membership Features and Frequently Asked Questions
   - PlayStation Plus documents membership-dependent catalog access and departures of some catalog titles.
3. Steam Refunds
   - Valve offers refunds for qualifying Steam purchases but excludes purchases made outside Steam, including third-party game keys; applicable consumer rights can provide additional remedies.
4. PlayStation buying guide
   - PlayStation's US buying guide distinguishes authorized new-product purchases, third-party used products without manufacturer warranty coverage, and certified refurbished products with warranty.
5. Entertainment Software Association Introduces the Accessible Games Initiative to Provide Players with Information About Accessibility Features in Video Games
   - The ESA's March xx.xx 2025 Accessible Games Initiative introduced voluntary feature tags, with implementation determined separately by participating companies.

5.3. Opportunity Mapping

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is a qualitative accessibility assessment, not a claim that one category is universally more attractive. Different segmentation lenses describe the same underlying opportunity rather than additional opportunities.

For Game Software & Content publishers, Steam admission supplies a documented route for qualifying rights holders, while external Steam Keys extend checkout without replacing activation. Wube Software's Factorio purchase demonstrates that direct downloads and Steam access can coexist. ■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■ ■ ■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■■■■

Regional commercialization should be divided into functions. ■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■ ■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■■■■■ ■■ ■■■ ■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■ ■■■■■■■■ Country coverage, approval authority, renewal, customer support and account compatibility require express commitments; an advertised service does not establish permission for another title.

■■■■■ ■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■ ■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■ ■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■ ■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■ ■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■ ■ ■■■■■■■■ A streaming permission does not supply the customer's content license or assure delivery. Deferral is preferable when the intended title, territory or provider eligibility remains unsettled.

Equipment opportunities concern completeness rather than automatic replacement. ■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■ ■■■■■■■■ ■■■■■■■ ■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■ Fanatec's guarantee covers qualifying individual products within a bundle, not automatic replacement of the whole package.

Learning & Education offers a documented administrator-facing route through Minecraft Education. Academic eligibility and existing institutional coverage should be established before proposing additional licenses; commercial licensing supplies an alternative without changing the game's features. ■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■ ■■■ ■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■ ■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■

For Game Advertising, Roblox's programmatic and managed-service routes make defined placements assessable by agency buyers. Its portfolio retains a beta distinction and differentiates audience-targeting eligibility. ■■■■■■■■ ■■■■■■ ■■■■■■■ ■ ■■■■■■■■■■ ■■■■■

RESEARCH SAMPLE REPORT

[redacted]

Sources & Evidence

1. Onboarding - Steamworks Documentation
   · The documented admission route establishes a feasible distribution process for qualifying rights holders, not evidence of title demand or assured discovery. ([partner.steamgames.com](https://partner.steamgames.com/doc/gettingstarted/onboarding))
2. Microsoft / Activision Blizzard (ex-cloud streaming rights) merger inquiry
   · The CMA record separates Ubisoft's covered streaming rights from Microsoft's publisher acquisition and preserves specified EEA and existing-agreement licensing routes. ([gov.uk](https://www.gov.uk/cma-cases/microsoft-slash-activision-blizzard-ex-cloud-streaming-rights-merger-inquiry))
3. Purchasing Options for Minecraft Education Licenses
   · Academic and commercial Minecraft Education licenses provide the same game features but different purchasing and administration routes; eligible institutions can purchase directly or through licensing partners. ([edusupport.minecraft.net](https://edusupport.minecraft.net/hc/en-us/articles/xx.xx-Purchasing-Options-for-Minecraft-Education-Licenses))
4. Steam Keys - Steamworks Documentation
   · External key distribution diversifies purchasing locations without replacing Steam activation, supporting comparison with genuinely different delivery arrangements. ([partner.steamgames.com](https://partner.steamgames.com/doc/features/keys))
5. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
   · The amended COPPA rule requires separate parental consent for covered nonintegral third-party disclosures; service participation does not establish disclosure permission. ([govinfo.gov](https://www.govinfo.gov/content/pkg/FR-2025-xx.xx-xx.xx/html/2025-xx.xx.htm))
6. Activision Blizzard Cloud Game Streaming in the EEA
   · Microsoft's EEA provider license has defined consumer, game and provider eligibility and is nonexclusive, nontransferable and nonsublicensable. ([xbox.com](https://www.xbox.com/en-US/legal/activision-blizzard-cloud-game-streaming-eu))
7. Compatibility with Nintendo Switch Games - Nintendo UK
   · The compatibility record supports distinguishing an existing household's equipment-preservation purchase from a new buyer's complete package. ([nintendo.com](https://www.nintendo.com/en-gb/Hardware/Nintendo-Switch-xx.xx/Compatibility-with-Nintendo-Switch-games-xx.xx.html))
8. Immersive Ads on Roblox
   · Roblox's advertiser portfolio presents programmatic and managed-service routes, differentiates targeting eligibility, and labels Homepage Feature as beta. These are offered conditions, not independent campaign-effectiveness evidence. ([brands.roblox.com](https://brands.roblox.com/advertising))
9. Understanding Compatibility: The Fanatec Ecosystem
   · Fanatec locates PlayStation compatibility in a licensed wheel base and Xbox compatibility in a licensed steering wheel, supporting complete-combination qualification. ([fanatec.com](https://www.fanatec.com/us/en/explorer/products/racing-wheels-wheel-bases/the-fanatec-ecosystem/))
10. Fanatec Consumer Guarantee
    · Fanatec's guarantee identifies Corsair GmbH, qualifying purchase channels and individual-product remedies within bundles. ([help.fanatec.com](https://help.fanatec.com/hc/en-us/articles/xx.xx-Fanatec-Consumer-Guarantee))

11. Nuuvem: Seu Jogo no Mercado Latinoamericano
    - Nuuvem's commerce, key-management and bilingual-support offering supports a function-specific alternative to establishing those responsibilities internally. ([nuuvem.com](https://www.nuuvem.com/lp/pt/partners/))
12. Services - Tamatem Games
    - Tamatem's offered localization and audience services differ from payment administration; advertised capability does not establish country permissions or negotiated rights. ([tamatem.co](https://tamatem.co/service))
13. Issues with COD Points Purchases for Call of Duty: Mobile - Activision Support
    - Activision recognizes Carry1st among Call of Duty: Mobile transaction providers, lists alternatives, warns of regional limitations, and assigns unresolved purchase questions to the relevant provider. ([support.activision.com](https://support.activision.com/cod-mobile/articles/cod-points-purchases-call-of-duty-mobile))
14. Game Purchase - Factorio
    - Wube's direct Factorio purchase provides downloads and permits Steam-key redemption, demonstrating coexistence of direct and platform delivery for a named game. ([factorio.com](https://www.factorio.com/buy))

5.4. Distribution Channel Analysis

Retailers & Reseller Marketplaces can change checkout without changing the underlying platform relationship. Steam Keys allow an external purchase to activate a Steam license, while publishers retain key-management responsibilities. ■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■ ■■■ ■■■■■■ ■■■ ■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■■■

Direct Producer Sales and alternative mobile marketplaces are jurisdiction-specific routes, not unrestricted substitutes for app stores. Apple's EU terms effective October xx.xx 2026 describe developer website distribution and alternative marketplaces while retaining notarization and commissions on qualifying external digital transactions. ■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■■

Telecom & Cross-Service Bundles can consolidate subscription management while adding account coordination. ■■■■ ■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ Cloud reach is also operator-specific: NVIDIA distinguishes its directly served territories from those served by GeForce NOW Alliance partners.

Game Advertising has an additional agency-facing route. Roblox's April 2025 announcement described planned direct buying and access through Google's advertising solutions. ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■

Sources & Evidence

1. GeForce NOW FAQs
   - NVIDIA distinguishes territories served directly from those served through GeForce NOW Alliance partners, supporting operator-specific channel assessment.
2. Get Xbox Game Pass Ultimate on EE
   - EE documents Microsoft-account activation, cancellation of an existing subscription during migration, and EE management of eligible Game Pass subscription relationships.
3. Changes for Apps in the European Union - Apple Developer
   - Apple describes alternative marketplaces and developer website distribution in the EU, continued notarization, and unified commercial terms effective October xx.xx 2026 that include commissions on qualifying external digital transactions.
4. PlayStation buying guide
   - PlayStation recommends authorized retailers for authenticity, return-policy and warranty considerations, establishing a documented hardware-channel distinction.
5. Steam Keys - Steamworks Documentation
   - Steam Keys allow retail or other-store sales to activate a Steam product license, while publishers retain key-management responsibilities.
6. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
   - Roblox's April xx.xx 2025 announcement described planned Rewarded Video purchasing through Google's advertising solutions and direct buying, alongside format-specific measurement and suitability relationships.

5.5. Pricing Trend Analysis

Gaming pricing is shaped by the entitlement package and continuing obligations, not simply by the game's brand. ■■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■ ■ ■■■■ ■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ Bundling can make several benefits available through one relationship, but its commercial appeal depends on which benefits the household actually wants.

Promotional flexibility is constrained by channel rules. ■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■ ■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■ ■■■■■ ■■■■ ■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ A reseller route can provide another purchasing location without allowing unrestricted promotional differences or eliminating platform dependence.

Import costs and household budgets create opposing pressures. Nintendo's May 2025 briefing described tariff costs alongside the need to preserve a new platform's momentum; EA's fiscal 2025 filing identifies inflation and discretionary-spending conditions as risks. ■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■ ■■■■■■ ■■■■■■■ ■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■■■

Sources & Evidence

1. PlayStation Plus - Membership Features and Frequently Asked Questions
   · PlayStation Plus combines different benefits across membership tiers and documents recurring charges until cancellation; package relevance is a conditional commercial implication.
2. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
   · EA's fiscal 2025 filing identifies inflation, adverse discretionary-spending conditions, competing entertainment and trade restrictions as business risks rather than universal demand outcomes.
3. Nintendo Financial Results Briefing for Fiscal Year Ended March 2025 - Q&A Summary
   · Nintendo's May 2025 briefing described recognizing tariffs as a cost while weighing commercial responses against the importance of a new platform's momentum.
4. Steam Keys - Steamworks Documentation
   · Valve's key guidelines prohibit giving Steam customers a worse deal than Steam Key purchasers, supporting coordinated cross-channel promotions.
5. Discounting - Steamworks Documentation
   · Steam imposes separate cooldown conditions after releases, base-price increases and discounts, with specified seasonal-sale exceptions.

5.6. Regulatory Compliance & Standards Framework

[redacted] Operators and advertising counterparties should establish responsibility for the actual disclosure and consent relationship. Integral service disclosures and applicable exceptions require separate treatment rather than a blanket advertising prohibition.

EU monetization obligations also follow the transaction rather than the currency label. [redacted] Publishers should review the purchase and subsequent spending relationship together; virtual currency does not remove consumer protections, and competent authorities and courts determine individual legality.

Proposed requirements must not be treated as operative restrictions. The European Commission's September xx.xx 2026 EU KIDS Act proposal addresses safeguards for online games, app stores and relevant AI systems, while distinguishing account-age rules for certain social-networking and video-sharing services. [redacted]

[redacted] Device suppliers should verify applicable equipment licenses before distribution. Owning a game brand or holding publishing authorization does not establish clearance for associated hardware functionality.

Sources & Evidence

1. Sony Group Form 20-F - Fiscal Year Ended March 31, 2026
   · Sony's fiscal 2026 Form xx.xx-F identifies Blu-ray-enabled PlayStation hardware as substantially dependent on patents licensed through Via Licensing Alliance.
2. Consumer Protection Cooperation Network's Key Principles on In-Game Virtual Currencies
   · The CPC Network's March xx.xx 2025 principles apply existing EU consumer law to purchased virtual currencies, including transaction transparency, fairness, withdrawal and vulnerable-consumer considerations; gameplay-only currencies are excluded.
3. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
   · The amended COPPA rule became effective June xx.xx 2025, with a general compliance deadline of April xx.xx 2026, and requires separate consent for covered nonintegral third-party disclosures.
4. Proposal for EU KIDS Act - EU Keeping Internet Digital Spaces Accountable and Trustworthy
   · The European Commission published the EU KIDS Act proposal on September xx.xx 2026; its proposal status must be distinguished from an enacted, effective obligation.
5. The KIDS Act explained
   · The Commission's explanation distinguishes proposed account-age rules for relevant social-networking and video-sharing services from safeguards addressing online games, app stores and AI systems.

5.7. ESG & Sustainability Analysis

[redacted] These examples support title- and device-specific comparisons, not a universal trade-off. Publishers and platform operators should make the supported mode and experience consequences clear before positioning an environmental benefit; customer acceptance remains conditional on the intended play experience.

Circularity creates a supported alternative to an undifferentiated used-equipment purchase. Sony's 2025 sustainability report documents certified refurbished PS5 consoles and controllers in the United States and United Kingdom. [redacted]

Social inclusion also depends on usable purchasing information. The Accessible Games Initiative provides voluntary feature disclosures for players, parents and teachers. [redacted]

Sources & Evidence

1. Entertainment Software Association Introduces the Accessible Games Initiative to Provide Players with Information About Accessibility Features in Video Games
   · Accessibility tags are intended to inform players, parents and teachers before purchase; universal accessibility or adoption is not established by participation.

2. Gaming Sustainability - Fortnite & Unreal Engine Case Study
   · Microsoft's Fortnite case study reports implemented energy-efficiency improvements without reducing visual fidelity or menu responsiveness; this is a named case, not a universal performance outcome.
3. Environmental Stewardship Policy - Sony Interactive Entertainment
   · Sony Interactive Entertainment describes optional Power Saver support for games that can reduce gameplay performance, alongside durability, repair and resource-conservation initiatives.
4. Sony Sustainability Report 2025 - Environment
   · Sony's 2025 sustainability report documents certified refurbished PS5 consoles and controllers in the United States and United Kingdom, positioned within product and component reuse initiatives.

5.8. Disruption & Risk Scenarios

A platform-specific support withdrawal could impair a retailer's or publisher's continuing-content proposition without ending every customer's ability to play. ■■■■ ■■■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■ ■■■■ ■■■ ■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■ ■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■ ■■■■■■■ ■■■■■■■ ■■■■■■ Exposed sellers should stop promising unsupported features and distinguish retained solo content from continuing multiplayer or releases; changing platforms may require another entitlement.

A change in youth-access or disclosure obligations could invalidate advertising assumptions before it affects general game availability. ■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■ ■■■■ ■■■ ■■■■■■■■■ ■■ ■■■■■■■■■ ■■■ ■■■■ ■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■ Integral disclosures and applicable exceptions are counterforces to a blanket restriction, and the proposal's social-account age provisions should not be presented as an enacted prohibition on gaming.

■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■ ■■■■ ■■■■■■■ ■■ ■■■■■ ■■■ ■■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■ Their response should be to revise customer commitments and compare supported substitute packages, not silently substitute an incompatible component. Broader sourcing can add resilience but also adds qualification, coordination and inventory obligations.

Sources & Evidence

1. Nintendo Annual Report 2026 - Fiscal Year Ended March 31, 2026
   · Nintendo's fiscal 2026 report identifies external component and assembly dependencies, inventory-obsolescence exposure, and procurement from multiple companies as a countermeasure. ([nintendo.co.jp](https://www.nintendo.co.jp/ir/pdf/2026/annual2603e.pdf))

2. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
   · The final rule's general compliance deadline was April xx.xx 2026. Integral disclosures and applicable exceptions require separate treatment, limiting blanket audience-ineligibility assumptions. ([govinfo.gov](https://www.govinfo.gov/content/pkg/FR-2025-xx.xx-xx.xx/html/2025-xx.xx.htm))
3. Proposal for EU KIDS Act - EU Keeping Internet Digital Spaces Accountable and Trustworthy
   · The European Commission published the EU KIDS Act proposal on September xx.xx 2026; the inspected record identifies a legislative proposal rather than operative gaming restrictions. ([digital-strategy.ec.europa.eu](https://digital-strategy.ec.europa.eu/en/library/proposal-eu-kids-act-eu-keeping-internet-digital-spaces-accountable-and-trustworthy))
4. The KIDS Act explained
   · The Commission's explanation distinguishes proposed social-account age rules from safeguards addressing games and app stores; final adoption and scope are necessary scenario triggers. ([digital-strategy.ec.europa.eu](https://digital-strategy.ec.europa.eu/en/faqs/kids-act-explained))
5. Beat Saber - FAQ
   · Beat Saber's PlayStation notice retains existing-content access while ending new content after June xx.xx 2025 and multiplayer on February xx.xx 2026. ([beatsaber.com](https://beatsaber.com/faq.html))

5.9. Return on Investment & Cost-Benefit Analysis

For a publisher entering a regional audience, outsourcing is justified only by responsibilities it would otherwise need to establish. ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■ ■ ■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■ Commitment should follow an executed country-and-title mandate with support, reporting, renewal and exit provisions-not a partner's general participation claim.

For a household, remote execution can justify postponing equipment expenditure only when the desired games and usable access conditions coincide. ■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■ ■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■ ■■ ■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■ ■ ■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■■■ Benefits remain sensitive to title continuity, actual use, support burden and acceptance of the fallback; the public records do not establish a universal investment case.

For an equipment retailer, complete-package qualification could reduce avoidable returns and support disputes, but that benefit must exceed the costs of assistance, inventory and continuing remedies. Ring Fit Adventure demonstrates how retaining compatible equipment can avoid an unnecessary full replacement. ■■■■■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■ ■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■ ■■■■■■■■■■■

RESEARCH SAMPLE REPORT

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Sources & Evidence

1. Ring Fit Adventure Q&A - Nintendo UK
   · Retaining compatible original controllers provides a documented alternative to replacing an entire Ring Fit Adventure equipment relationship. Avoided returns and support costs are conditional implications, not measured outcomes. ([nintendo.com](https://www.nintendo.com/en-gb/Support/Purchases-Subscriptions/Games/Ring-Fit-Adventure-Q-A-xx.xx.html))
2. Nintendo Annual Report 2026 - Fiscal Year Ended March 31, 2026
   · Nintendo's disclosed inventory and fulfillment risks support assessing working-capital exposure and supplier commitments before making equipment-channel commitments. This is not evidence of an actual disruption. ([nintendo.co.jp](https://www.nintendo.co.jp/ir/pdf/2026/annual2603e.pdf))
3. Membership Terms for GeForce NOW
   · The membership contract supports comparing premium continuity, fallback benefits and local execution from the household perspective without assuming unrestricted subscription access. ([nvidia.com](https://www.nvidia.com/en-us/geforce-now/membership-terms/))
4. Upcoming Changes to Xbox Cloud Gaming
   · Microsoft attributes its announced access changes to the continuing cost of providing cloud gaming, supporting attention to service obligations rather than treating recurring access receipts as assured economic benefit. ([news.xbox.com](https://news.xbox.com/en-us/2026/xx.xx/xx.xx/xbox-cloud-gaming-changes/))
5. Fanatec Consumer Guarantee
   · The guarantee excludes automatic full-bundle replacement and distinguishes qualifying coverage, supporting attention to retained retailer support obligations. ([help.fanatec.com](https://help.fanatec.com/hc/en-us/articles/xx.xx-Fanatec-Consumer-Guarantee))
6. Services - Tamatem Games
   · The broader service portfolio establishes responsibilities that could be outsourced; any economic benefit depends on avoiding genuine internal duplication and contracting for delivery. ([tamatem.co](https://tamatem.co/service))
7. Issues with COD Points Purchases for Call of Duty: Mobile - Activision Support
   · The title owner's support record establishes a transaction-support responsibility distinct from broader publishing rights; this supports comparing a narrow commerce appointment with broader outsourcing. ([support.activision.com](https://support.activision.com/cod-mobile/articles/cod-points-purchases-call-of-duty-mobile))

6. Cumulative Impact of Artificial Intelligence 2026

AI has a documented role in operating gaming communities, but does not remove human service obligations. Roblox's August 2025 Sentinel disclosure describes reported safety flagging followed by investigation by human experts. [redacted]

Generative AI can also change distribution and labor conditions. Steam distinguishes pre-generated from live-generated player-facing content, requires relevant disclosures and safeguards, and retains contractual promises against illegal or infringing content. [redacted]

Player-assistance initiatives remain dependent on platform commitment. [redacted] Suppliers evaluating assistant integration should establish continuing support and an exit arrangement; potential discovery or support benefits do not establish durable adoption.

Sources & Evidence

1. Open Sourcing Roblox Sentinel: Our Approach to Preemptive Risk Detection
   · Roblox's August xx.xx 2025 disclosure describes Sentinel's reported operational safety role and emphasizes human experts investigating flagged cases within a layered moderation system.
2. Content Survey - Steamworks Documentation
   · Steam's Content Survey distinguishes pre-generated and live-generated player-facing AI content, requires relevant disclosure and safeguards, and retains promises against illegal or infringing content.
3. 2025 Interactive Media Video Game Agreement
   · The ratified 2025 SAG-AFTRA Interactive Media Agreement includes consent and disclosure requirements for covered AI digital replicas and specified consent-suspension protections.
4. Your Personal Gaming Sidekick Awaits: Gaming Copilot (Beta) is Coming to Windows PC and Xbox on Mobile
   · Microsoft's September xx.xx 2025 announcement described a Gaming Copilot beta rollout for eligible PC players and planned mobile availability, with assistance and recommendation functions.
5. Microsoft's new Xbox chief nixes Gaming Copilot for mobile and console, shakes up leadership
   · GeekWire's May xx.xx 2026 reporting corroborates Xbox's announcement that mobile Gaming Copilot would begin winding down and console development would stop; the announcement does not establish a completed mobile shutdown.

RESEARCH SAMPLE REPORT

7. Gaming Market, by Offering

Game Software & Content purchasing depends on what the buyer already holds. Bandai Namco specifies that Shadow of the Erdtree requires the ELDEN RING base game, distinguishing Expansions & Playable Add-Ons from Base Games. [redacted]

Play-Access Services differ in the benefit that continues over the access period. FINAL FANTASY XIV combines product eligibility with subscription access to a particular game. [redacted]

Dedicated Gaming Devices and Gaming Peripherals & Accessories require different completeness checks. Home Gaming Consoles, Handheld Gaming Systems and Gaming XR Headsets supply equipment, but their form does not establish a game's full requirements. [redacted]

Game Advertising serves a different purchasing approver and requires format-specific commercial verification. [redacted] A platform's ability to serve players does not make every announced advertising format purchasable, and documented availability does not establish effectiveness for a particular brand.

Figure 8. Global Gaming Market Size, by Offering, 2025 (%)

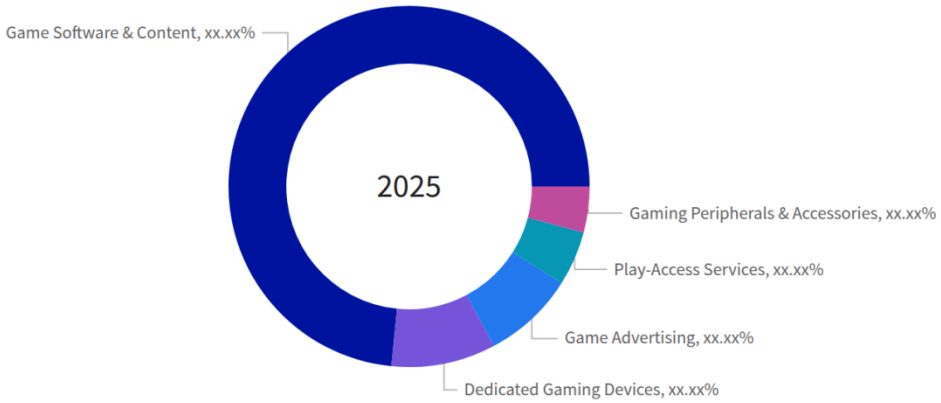

Figure 9. Global Gaming Market, by Offering, 2032 (USD Million)

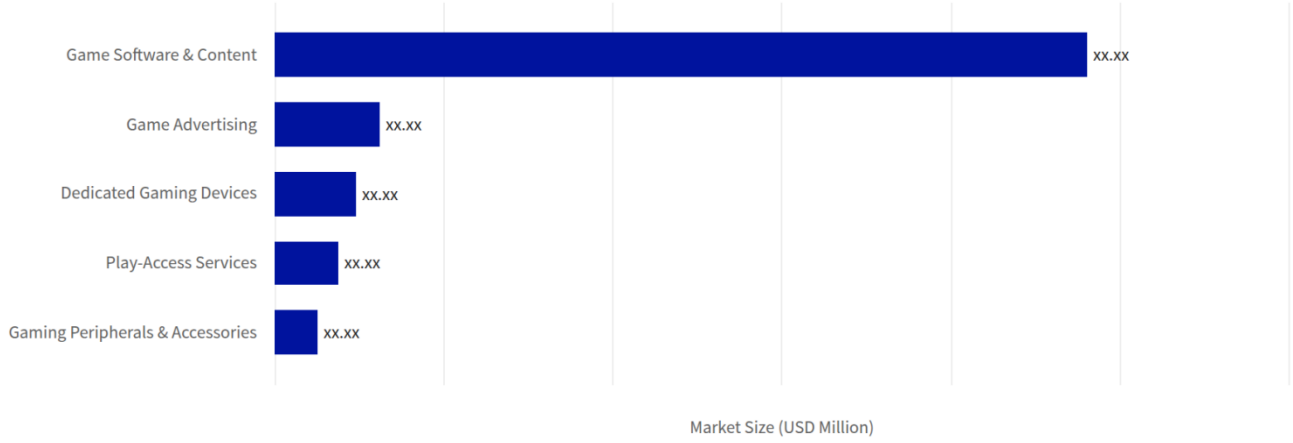

Table 4. Global Gaming Market, by Offering growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 5. Global Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. GeForce NOW FAQs
   · GeForce NOW generally requires ownership or purchase through a supported game store for paid games and separately supports free-to-play titles. ([nvidia.com](https://www.nvidia.com/en-us/geforce-now/faq/))
2. Introducing Meta Quest 3S, Our Most Affordable Mixed Reality Headset
   · Meta's October xx.xx 2024 update stated that Quest 3S was available for purchase; the launch disclosure documented compatibility with the existing Quest application and game library. ([about.fb.com](https://about.fb.com/news/2024/xx.xx/meta-quest-3s-our-most-affordable-mixed-reality-headset/))
3. Ring Fit Adventure Q&A - Nintendo UK
   · Nintendo describes Ring Fit Adventure as game content packaged with Ring-Con and leg-strap accessories, establishing a software-and-peripheral relationship. ([nintendo.com](https://www.nintendo.com/en-gb/Support/Purchases-Subscriptions/Games/Ring-Fit-Adventure-Q-A-xx.xx.html))
4. PlayStation Plus - Membership Features and Frequently Asked Questions
   · PlayStation Plus distinguishes catalog and multiplayer benefits, requires continuing membership for relevant catalog access, allows title departures, and exempts most free-to-play multiplayer games from membership. ([playstation.com](https://www.playstation.com/en-us/ps-plus/))
5. Roblox Expands Advertising Platform as Essential Channel for the Next Generations
   · Roblox's January xx.xx 2026 disclosure described Rewarded Video as available and the Homepage Feature as in closed beta; it does not establish subsequent availability or campaign effectiveness. ([about.roblox.com](https://about.roblox.com/newsroom/2026/xx.xx/roblox-expands-advertising-platform))
6. Consumer Protection Cooperation Network's Key Principles on In-Game Virtual Currencies
   · The CPC principles distinguish purchasing virtual currency from subsequently spending it on digital game content or services within EU consumer-law scope. ([commission.europa.eu](https://commission.europa.eu/document/download/8af13e88-xx.xx-436c-b137-9853e7fe866a_en?filename=Key+principles+on+in-game+virtual+currencies.pdf))
7. ELDEN RING | Official Site
   · Bandai Namco states that Shadow of the Erdtree requires the ELDEN RING base game, directly supporting the expansion prerequisite. ([bandainamcoent.com](https://www.bandainamcoent.com/games/elden-ring))
8. FINAL FANTASY XIV Product Page
   · The FINAL FANTASY XIV product comparison distinguishes product and expansion eligibility from subscription requirements for full-game access. ([na.finalfantasyxiv.com](https://na.finalfantasyxiv.com/product/))

9. Steam Deck :: Hardware

· Valve presents Steam Deck as portable PC gaming hardware, supporting a named Handheld Gaming Systems example. ([steamdeck.com](https://www.steamdeck.com/en/hardware))

10. Industrial Strategy Sector Definitions List - Video Games

· Taxonomy evidence: The official definition cautions that its industry codes may not capture the full video-game ecosystem. Its activity-based boundary is therefore not interchangeable with this study's final-consumer transaction boundary, leaving hardware and ecosystem perimeter choices explicit. ([gov.uk](https://www.gov.uk/government/publications/industrial-strategy/industrial-strategy-sector-definitions-list))

11. Section 6B - Appliances, Household Equipment, and Other Selected Items

· Taxonomy evidence: The U.S. purchase questionnaire separates computer games from gaming consoles/accessories; this supports component separation, not a Global revenue perimeter. ([census.gov](https://www.census.gov/programs-surveys/ce/information-booklet/section-6b.html))

12. IAB Creative Guidelines and Best Practices in Advertising in Gaming

· Taxonomy evidence: The guidelines distinguish advertising within active gameplay from advertising associated with spectators and streams, supporting a separately supplied game-advertising deliverable. ([iab.com](https://www.iab.com/wp-content/uploads/2024/xx.xx/IAB_Creative_Guidelines_Best_Practices_Advertising_Gaming_March_2024.pdf))

13. Apple celebrates a groundbreaking year in entertainment

· Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

14. FY26.1Q Supplemental Information

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.

15. Microsoft Corporation 2025 Proxy Statement

· Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.

16. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

17. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.

18. Nintendo Co., Ltd. Annual Report 2021

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

19. Apple services enrich peoples' lives throughout the year
    - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
20. Sony FY25.3Q Supplemental Information
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
21. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
22. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
23. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
24. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.

7.1. Game Software & Content

Table 6. Global Gaming Market, by Game Software & Content growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 7. Global Gaming Market Size, by Game Software & Content, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 8. Global Gaming Market Size, by Game Software & Content, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 9. Global Gaming Market Size, by Game Software & Content, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Industrial Strategy Sector Definitions List - Video Games
   - Taxonomy evidence: The UK government's industrial-strategy definition describes video games through development and distribution and maps it to computer-game publishing and interactive leisure-software development codes. This independently supports the software/content component but does not establish a hardware-inclusive Global expenditure denominator. ([gov.uk](https://www.gov.uk/government/publications/industrial-strategy/industrial-strategy-sector-definitions-list))
2. Section 6B - Appliances, Household Equipment, and Other Selected Items
   - Taxonomy evidence: Computer software, including computer games, is separately identified from gaming consoles/accessories.
3. FTC Video Game Loot Box Workshop - Staff Perspective
   - Taxonomy evidence: The staff paper distinguishes initial game acquisition from subsequent expansion packs, season passes, and virtual-item transactions. ([ftc.gov](https://www.ftc.gov/system/files/documents/reports/staff-perspective-paper-loot-box-workshop/loot_box_workshop_staff_perspective.pdf))
4. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

5. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
6. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
7. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
8. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
9. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
10. Apple services enrich peoples' lives throughout the year
    - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

11. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
12. United Nations World Statistics Pocketbook 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

13. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
14. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
15. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
16. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
17. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

18. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
19. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
20. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

21. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
22. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
23. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
24. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
25. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
26. Sony FY25.3Q Supplemental Information
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
27. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.

7.1.1. In-Game Items, Currency & Features

Table 10. Global Gaming Market Size, by In-Game Items, Currency & Features, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 11. Global Gaming Market Size, by In-Game Items, Currency & Features, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 12. Global Gaming Market Size, by In-Game Items, Currency & Features, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FTC Video Game Loot Box Workshop - Staff Perspective
   - Taxonomy evidence: Identified supplemental purchases include cosmetic items, characters, card packs, progression benefits, and stronger equipment.
2. Consumer Protection Cooperation Network - Key Principles on In-Game Virtual Currencies
   - Taxonomy evidence: The March xx.xx 2025 principles define purchased in-game virtual currencies as value used to obtain digital game content or services. They distinguish currency acquisition from subsequent expenditure. ([commission.europa.eu](https://commission.europa.eu/document/download/8af13e88-xx.xx-436c-b137-9853e7fe866a_en?filename=Key+principles+on+in-game+virtual+currencies.pdf))
   - Taxonomy evidence: This supports the currency/content distinction; the taxonomy's single-counting treatment is an analytical allocation rule, not a claim of uniform Global regulation.
3. Kids and Video Games - Federal Trade Commission Consumer Advice
   - Taxonomy evidence: The guidance identifies purchasable weapons, currency, loot boxes, outfits, and bonus levels; it also notes that paid game versions can limit advertising.
4. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

5. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
6. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
7. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
8. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
9. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
10. Apple services enrich peoples' lives throughout the year
    - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

11. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
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17. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
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21. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
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25. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
26. Sony FY25.3Q Supplemental Information
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
27. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.

7.1.2. Base Games

Table 13. Global Gaming Market Size, by Base Games, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 14. Global Gaming Market Size, by Base Games, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 15. Global Gaming Market Size, by Base Games, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FTC Video Game Loot Box Workshop - Staff Perspective
   - Taxonomy evidence: It describes initial game purchases as distinct from later purchasable content.
2. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
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   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
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   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
24. Sony FY25.3Q Supplemental Information
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
25. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.

7.1.3. Expansions & Playable Add-Ons

Table 16. Global Gaming Market Size, by Expansions & Playable Add-Ons, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 17. Global Gaming Market Size, by Expansions & Playable Add-Ons, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 18. Global Gaming Market Size, by Expansions & Playable Add-Ons, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FTC Video Game Loot Box Workshop - Staff Perspective
   - Taxonomy evidence: Expansion packs and passes supplying upcoming game content are identified commercial additions.
2. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
3. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
4. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
5. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

6. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
7. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
8. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
9. Measuring digital development: Facts and Figures 2025 - Internet use
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.

10. United Nations World Statistics Pocketbook 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.
11. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
12. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
13. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.

14. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
15. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.
16. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.

17. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
18. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.
19. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
20. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
21. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.

22. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
23. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
24. Sony FY25.3Q Supplemental Information
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.

7.2. Dedicated Gaming Devices

Table 19. Global Gaming Market, by Dedicated Gaming Devices growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 20. Global Gaming Market Size, by Dedicated Gaming Devices, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 21. Global Gaming Market Size, by Dedicated Gaming Devices, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 22. Global Gaming Market Size, by Dedicated Gaming Devices, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Section 6B - Appliances, Household Equipment, and Other Selected Items
   - Taxonomy evidence: The questionnaire identifies gaming consoles as a household purchase class.
2. Kids and Video Games - Federal Trade Commission Consumer Advice
   - Taxonomy evidence: Consumer guidance identifies consoles, handheld gaming devices, computers, and tablets as gameplay devices. ([consumer.ftc.gov](https://consumer.ftc.gov/articles/kids-and-video-games))

3. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
4. FY26.1Q Supplemental Information
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
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   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
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   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
9. Apple services enrich peoples' lives throughout the year
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

10. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

12. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
14. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
15. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
16. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

17. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
18. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
19. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

20. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
21. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
22. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
23. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
25. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.

7.2.1. Home Gaming Consoles

Table 23. Global Gaming Market Size, by Home Gaming Consoles, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 24. Global Gaming Market Size, by Home Gaming Consoles, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 25. Global Gaming Market Size, by Home Gaming Consoles, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Section 6B - Appliances, Household Equipment, and Other Selected Items
   - Taxonomy evidence: The gaming-console purchase class lists PlayStation and Xbox among its examples.

2. Games Consoles - European Commission

· Taxonomy evidence: The European product scope describes mains-powered consoles using external televisions and dedicated console operating systems. Its narrower regulatory scope is not treated as the entire Global device market.
([energy-efficient-products.ec.europa.eu](https://energy-efficient-products.ec.europa.eu/product-list/games-consoles_en))

3. Apple celebrates a groundbreaking year in entertainment

· Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

4. FY26.1Q Supplemental Information

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.

5. Microsoft Corporation 2025 Proxy Statement

· Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.

6. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

7. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.

8. Nintendo Co., Ltd. Annual Report 2021

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

9. Apple services enrich peoples' lives throughout the year

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

10. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
11. United Nations World Statistics Pocketbook 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

12. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
13. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
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15. Tencent Announces 2025 Annual and Fourth Quarter Results
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16. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

17. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
18. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
19. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

20. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
21. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
22. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
23. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

7.2.2. Handheld Gaming Systems

Table 26. Global Gaming Market Size, by Handheld Gaming Systems, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 27. Global Gaming Market Size, by Handheld Gaming Systems, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 28. Global Gaming Market Size, by Handheld Gaming Systems, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Section 6B - Appliances, Household Equipment, and Other Selected Items
   - Taxonomy evidence: The same purchase class lists Nintendo Switch and Steam Deck, supporting inclusion of these dedicated systems within the broad device family.
2. Kids and Video Games - Federal Trade Commission Consumer Advice
   - Taxonomy evidence: Handheld gaming devices are expressly named as a consumer gameplay-device category.

3. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
4. FY26.1Q Supplemental Information
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
5. Microsoft Corporation 2025 Proxy Statement
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
6. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
7. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
8. Nintendo Co., Ltd. Annual Report 2021
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
9. Apple services enrich peoples' lives throughout the year
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

10. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
16. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

17. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
19. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

20. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
21. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
22. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
23. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
25. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.

7.2.3. Gaming XR Headsets

Table 29. Global Gaming Market Size, by Gaming XR Headsets, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 30. Global Gaming Market Size, by Gaming XR Headsets, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 31. Global Gaming Market Size, by Gaming XR Headsets, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Online Nation 2022 Report

   · Taxonomy evidence: The report distinguishes headset hardware for VR gameplay from its processing host, including computer-, console-, phone-dependent, and standalone configurations. No audience proportions are used.
   ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/online-research/online-nation/2022/online-nation-2022-report.pdf))

2. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
3. FY26.1Q Supplemental Information
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

7.3. Game Advertising

Table 32. Global Gaming Market Size, by Game Advertising, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 33. Global Gaming Market Size, by Game Advertising, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 34. Global Gaming Market Size, by Game Advertising, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. IAB Creative Guidelines and Best Practices in Advertising in Gaming

   · Taxonomy evidence: The framework recognizes intrinsic, adjacent, interstitial, and audio game-advertising contexts and discusses rewarded placements. These are examples within the retained family, not a claimed exclusive subtype partition.

   · Taxonomy evidence: The source's broader spectator and livestream coverage is outside this taxonomy's frozen boundary.

2. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
3. FY26.1Q Supplemental Information
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
4. Microsoft Corporation 2025 Proxy Statement
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
5. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
6. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
7. Nintendo Co., Ltd. Annual Report 2021
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
8. Apple services enrich peoples' lives throughout the year
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

9. Measuring digital development: Facts and Figures 2025 - Internet use
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
10. United Nations World Statistics Pocketbook 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

11. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
12. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
13. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
14. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
15. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

16. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
17. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
18. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

19. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
20. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
21. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
22. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
23. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
24. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.

7.4. Play-Access Services

Table 35. Global Gaming Market, by Play-Access Services growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 36. Global Gaming Market Size, by Play-Access Services, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 37. Global Gaming Market Size, by Play-Access Services, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 38. Global Gaming Market Size, by Play-Access Services, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Microsoft / Activision Blizzard Merger Inquiry - Final Report
   · Taxonomy evidence: The 2023 report distinguishes catalog access, multiplayer functionality, and cloud-server access, including bundled provision. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/644939aa529eda000c3b0525/Microsoft_Activision_Final_Report_.pdf))
2. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
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5. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

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· Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.

7. Nintendo Co., Ltd. Annual Report 2021

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.

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13. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
14. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
15. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

16. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
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17. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
18. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

19. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
20. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
21. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
22. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
23. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
24. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

25. PlayStation Blog - Your Guide to the All-New PlayStation Plus

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.

7.4.1. Game-Library Access

Table 39. Global Gaming Market Size, by Game-Library Access, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 40. Global Gaming Market Size, by Game-Library Access, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 41. Global Gaming Market Size, by Game-Library Access, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Microsoft / Activision Blizzard Merger Inquiry - Final Report
   · Taxonomy evidence: Paragraphs xx.xx and xx.xx distinguish catalog access from acquiring individual game licenses.
2. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
3. FY26.1Q Supplemental Information
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
4. Microsoft Corporation 2025 Proxy Statement
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
5. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

6. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
7. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
8. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
9. Measuring digital development: Facts and Figures 2025 - Internet use
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.

10. United Nations World Statistics Pocketbook 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.
11. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
12. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
13. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
20. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
21. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.

22. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
24. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
25. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.

7.4.2. Online Multiplayer & Platform Services

Table 42. Global Gaming Market Size, by Online Multiplayer & Platform Services, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 43. Global Gaming Market Size, by Online Multiplayer & Platform Services, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 44. Global Gaming Market Size, by Online Multiplayer & Platform Services, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Microsoft / Activision Blizzard Merger Inquiry - Final Report
   - Taxonomy evidence: Paragraph xx.xx(g) separately identifies online multiplayer capabilities within gaming subscriptions.

2. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
3. FY26.1Q Supplemental Information
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7. Nintendo Co., Ltd. Annual Report 2021
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
21. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
22. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
23. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
24. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.

7.4.3. Single-Game Access

Table 45. Global Gaming Market Size, by Single-Game Access, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 46. Global Gaming Market Size, by Single-Game Access, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 47. Global Gaming Market Size, by Single-Game Access, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Microsoft / Activision Blizzard Merger Inquiry - Final Report
   - Taxonomy evidence: Its multi-game-service definition distinguishes single-game subscriptions from access to a broad catalog.
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   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

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21. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
22. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
23. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

7.4.4. Cloud Gaming Access

Table 48. Global Gaming Market Size, by Cloud Gaming Access, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 49. Global Gaming Market Size, by Cloud Gaming Access, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 50. Global Gaming Market Size, by Cloud Gaming Access, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Microsoft / Activision Blizzard Merger Inquiry - Final Report
   - Taxonomy evidence: Paragraph xx.xx distinguishes cloud-server access using separately obtained games from catalog inclusion.
2. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

3. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
4. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
5. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
6. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
7. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
8. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

9. Measuring digital development: Facts and Figures 2025 - Internet use
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
10. United Nations World Statistics Pocketbook 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

11. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
12. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
13. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
14. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
15. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

16. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
17. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
18. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

19. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
20. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
21. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
22. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
23. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
24. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
25. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.

7.5. Gaming Peripherals & Accessories

Table 51. Global Gaming Market Size, by Gaming Peripherals & Accessories, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 52. Global Gaming Market Size, by Gaming Peripherals & Accessories, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 53. Global Gaming Market Size, by Gaming Peripherals & Accessories, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Section 6B - Appliances, Household Equipment, and Other Selected Items
   - Taxonomy evidence: Controllers, gaming headsets, and carrying cases are explicit gaming-accessory examples.
2. Games Consoles - European Commission
   - Taxonomy evidence: Controllers, input peripherals, docking stations, power supplies, and connecting cables are identified separately from the regulated console itself.
3. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
4. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
5. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.

6. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

7. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.

8. Nintendo Co., Ltd. Annual Report 2021

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

9. Apple services enrich peoples' lives throughout the year

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

10. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
11. United Nations World Statistics Pocketbook 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

12. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
13. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
14. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
15. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
16. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

17. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
18. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
19. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

20. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
21. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
22. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
23. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
25. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.

8. Gaming Market, by Gaming Platform

Multi-Platform Offerings should be evaluated through shared purchasing rights, not platform logos alone. Xbox Play Anywhere distinguishes cross-entitlement and cross-progression from optional cross-play, and documents a qualifying digital purchase usable on Xbox and Windows PC. ■■■■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■ ■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■ ■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ ■ ■■■■■■■■■■■■ ■■■■■■■■

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■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ An alternative route can change the intermediary relationship without removing platform conditions. Mobile-game publishers should compare the applicable agreement and audience access before committing; Apple's description of its terms does not independently establish regulatory compliance or a commercial advantage over the App Store.

Console Platforms and PC Platforms can also differ in continuing support for the same game. Beat Saber's supplier states that PlayStation content updates ended after June xx.xx 2025 and multiplayer became unavailable on February xx.xx 2026, while existing content remained playable and customer support continued. ■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■ ■■■■■ ■■■ ■■ ■■ ■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■

Figure 10. Global Gaming Market Size, by Gaming Platform, 2025 (%)

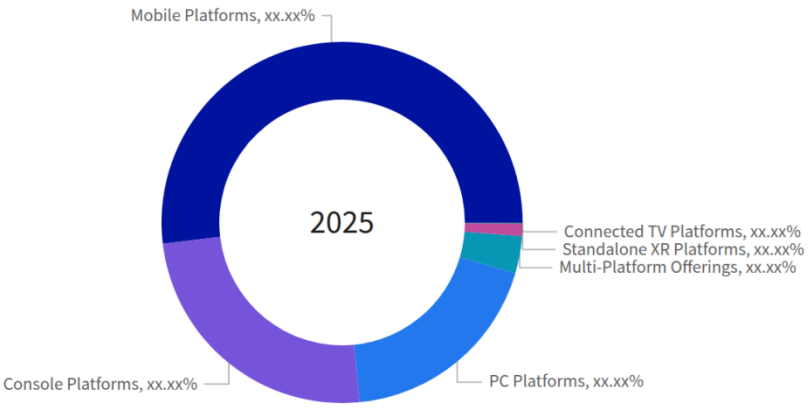

Figure 11. Global Gaming Market, by Gaming Platform, 2032 (USD Million)

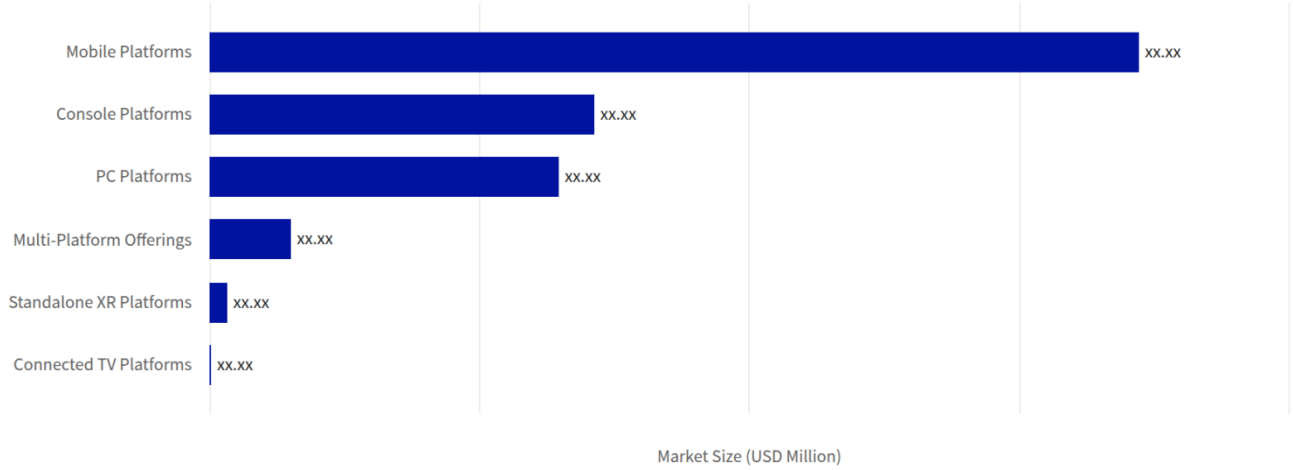

Table 54. Global Gaming Market, by Gaming Platform growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 55. Global Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. GeForce NOW FAQs

   · NVIDIA identifies supported mobile devices and selected television endpoints while retaining store-entitlement and title-availability conditions. ([nvidia.com](https://www.nvidia.com/en-us/geforce-now/faq/))

2. Introducing Meta Quest 3S, Our Most Affordable Mixed Reality Headset

   · Quest 3S library compatibility is a documented ecosystem-specific commitment, not evidence of compatibility across all XR platforms. ([about.fb.com](https://about.fb.com/news/2024/xx.xx/meta-quest-3s-our-most-affordable-mixed-reality-headset/))

3. Changes for Apps in the European Union - Apple Developer

   · Apple describes EU alternative marketplaces and authorized website distribution, continued notarization, and commercial terms effective October xx.xx 2026; these are company conditions rather than independent regulatory-compliance findings. ([developer.apple.com](https://developer.apple.com/support/apps-in-the-eu/))

4. Steam Deck :: Hardware

   · Steam Deck's documented portable PC positioning demonstrates why a handheld device classification does not determine a separate console-platform context. ([steamdeck.com](https://www.steamdeck.com/en/hardware))

5. Xbox Play Anywhere is the Future of Gaming on Xbox

   · Xbox Play Anywhere distinguishes cross-entitlement and cross-progression from optional cross-play and documents qualifying digital purchases usable on Xbox and Windows PC. ([developer.microsoft.com](https://developer.microsoft.com/en-us/games/resources/develop-for-xbox-anywhere/))

   · Taxonomy evidence: The explicit separation of cross-entitlement and cross-play supports the study rule that multiplayer interoperability alone does not place independently purchased licenses in Multi-Platform Offerings. This is a taxonomy inference from the supplier's stated rights structure, not a market-wide equivalence claim. ([developer.microsoft.com](https://developer.microsoft.com/en-us/games/resources/develop-for-xbox-anywhere/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

6. Is there cross-buy?
   - Resolution Games' Demeo cross-buy guidance states that an Oculus Store purchase does not provide the Steam version, establishing a bounded counterexample to unrestricted storefront portability. ([resolutiongames.zendesk.com](https://resolutiongames.zendesk.com/hc/en-us/articles/xx.xx-Is-there-cross-buy))
7. Beat Saber - FAQ
   - Beat Saber's dated notice ended PlayStation content updates after June xx.xx 2025 and multiplayer on February xx.xx 2026, while retaining existing-content play and customer support; it separately states that Steam music releases continue. ([beatsaber.com](https://beatsaber.com/faq.html))
8. Microsoft / Activision Blizzard Merger Inquiry - Final Report
   - Taxonomy evidence: Paragraph xx.xx identifies console, PC, and mobile access; paragraph xx.xx also identifies smart-TV endpoints. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/644939aa529eda000c3b0525/Microsoft_Activision_Final_Report_.pdf))
9. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
10. FY26.1Q Supplemental Information
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
11. Microsoft Corporation 2025 Proxy Statement
    - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
12. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
    - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
13. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
14. Nintendo Co., Ltd. Annual Report 2021
    - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
    - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
15. Apple services enrich peoples' lives throughout the year
    - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

8.1. Mobile Platforms

Table 56. Global Gaming Market Size, by Mobile Platforms, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 57. Global Gaming Market Size, by Mobile Platforms, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 58. Global Gaming Market Size, by Mobile Platforms, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Microsoft / Activision Blizzard Merger Inquiry - Final Report
   - Taxonomy evidence: Mobile devices are an expressly identified gameplay endpoint.
2. Online Nation 2022 Report
   - Taxonomy evidence: Phone-dependent VR uses the smartphone's screen and processing, supporting separation from standalone-headset ecosystems.
3. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
4. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
5. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.

6. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

7. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.

8. Nintendo Co., Ltd. Annual Report 2021

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

9. Apple services enrich peoples' lives throughout the year

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

10. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
15. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
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17. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
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18. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
19. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

20. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
21. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
22. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
23. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

8.2. Console Platforms

Table 59. Global Gaming Market Size, by Console Platforms, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 60. Global Gaming Market Size, by Console Platforms, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 61. Global Gaming Market Size, by Console Platforms, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Microsoft / Activision Blizzard Merger Inquiry - Final Report
   - Taxonomy evidence: Console access is identified separately from PC and mobile access.
2. Games Consoles - European Commission
   - Taxonomy evidence: The scope explicitly distinguishes dedicated console operating systems from conventional PC operating systems.
3. Online Nation 2022 Report
   - Taxonomy evidence: Console-dependent VR is identified separately from standalone-headset configurations.

4. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
5. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
6. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
7. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
8. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
9. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
10. Apple services enrich peoples' lives throughout the year
    - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

11. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
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21. Steamworks - Age Ratings Mandatory in Germany
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
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25. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

8.3. PC Platforms

Table 62. Global Gaming Market Size, by PC Platforms, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 63. Global Gaming Market Size, by PC Platforms, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 64. Global Gaming Market Size, by PC Platforms, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Microsoft / Activision Blizzard Merger Inquiry - Final Report
   - Taxonomy evidence: PC gaming is an expressly identified access category.
2. Online Nation 2022 Report
   - Taxonomy evidence: The report identifies VR headsets dependent on an external PC.

3. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
4. FY26.1Q Supplemental Information
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
5. Microsoft Corporation 2025 Proxy Statement
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
6. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
7. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
8. Nintendo Co., Ltd. Annual Report 2021
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
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   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
21. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
22. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
23. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

8.4. Multi-Platform Offerings

Table 65. Global Gaming Market Size, by Multi-Platform Offerings, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 66. Global Gaming Market Size, by Multi-Platform Offerings, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 67. Global Gaming Market Size, by Multi-Platform Offerings, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Xbox Play Anywhere - Microsoft Game Development
   - Taxonomy evidence: Microsoft's Xbox Play Anywhere explanation distinguishes cross-entitlement from cross-progression and optional cross-play, and states that a qualifying digital purchase grants Xbox and Windows PC play without an additional purchase. This establishes an actual combined-endpoint entitlement pattern rather than merely cross-platform availability. ([developer.microsoft.com](https://developer.microsoft.com/en-us/games/resources/develop-for-xbox-anywhere/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
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3. Apple celebrates a groundbreaking year in entertainment
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20. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
21. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
22. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
23. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

8.5. Standalone XR Platforms

Table 68. Global Gaming Market Size, by Standalone XR Platforms, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 69. Global Gaming Market Size, by Standalone XR Platforms, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 70. Global Gaming Market Size, by Standalone XR Platforms, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Online Nation 2022 Report
   - Taxonomy evidence: Standalone headsets are defined as not requiring a computer or smartphone to deliver the experience.
2. OECD Digital Economy Outlook 2024, Volume 1 - Virtual Reality and Its Opportunities and Risks
   - Taxonomy evidence: The chapter distinguishes standalone headset hardware from systems using a separate computer.

3. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
4. FY26.1Q Supplemental Information
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6. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
7. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
8. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
9. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

10. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
11. United Nations World Statistics Pocketbook 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

12. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
13. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
14. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
15. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
16. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

17. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
18. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
19. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

20. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
22. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
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24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

8.6. Connected TV Platforms

Table 71. Global Gaming Market Size, by Connected TV Platforms, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 72. Global Gaming Market Size, by Connected TV Platforms, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 73. Global Gaming Market Size, by Connected TV Platforms, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Microsoft / Activision Blizzard Merger Inquiry - Final Report
   - Taxonomy evidence: Smart TVs are identified as endpoints for consumer cloud gameplay.
2. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

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   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

11. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
13. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
14. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
15. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

16. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
17. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
18. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

19. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
20. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
21. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
22. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
23. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

9. Gaming Market, by Immersion Technology

Immersion Technology changes the equipment qualification attached to a purchase. Steam labels Beat Saber as VR Only and Demeo as VR Supported, providing a concrete distinction between a mandatory immersive requirement and a supported immersive option. ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■ ■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■ ■■ ■■■■■ ■■■ ■■■■■■■ ■■■■■ ■■ ■■■■■■■■■■■

Combined Immersion Modes require edition-specific interpretation. Resolution Games documents Demeo's mixed-reality gameplay on Quest alongside its broader immersive offering, while its Steam listing identifies supported VR. ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■ ■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■ ■■■ ■■■■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■ ■■ ■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■ ■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■ ■■■■■ ■■■■ ■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■

Augmented & Mixed Reality Only purchasing needs a more specific compatibility promise than an XR hardware label. CREATURE presents Starship Home as a mixed-reality game for Meta Quest xx.xx. ■■■■ ■■■■■■■■■■■ ■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■ ■■■■■ ■■■■■■■■ ■ ■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■■■■■

Figure 12. Global Gaming Market Size, by Immersion Technology, 2025 (%)

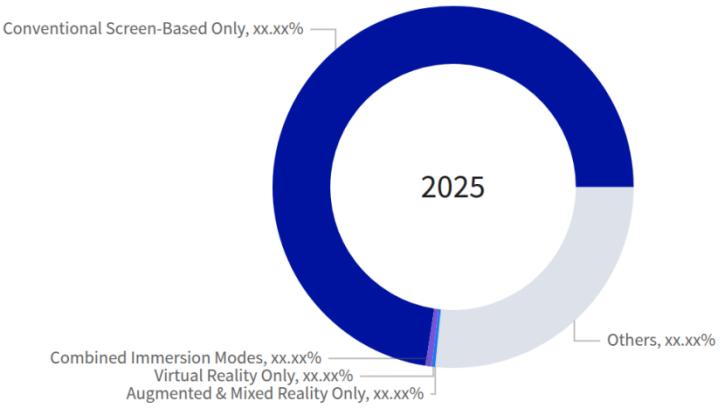

Figure 13. Global Gaming Market, by Immersion Technology, 2032 (USD Million)

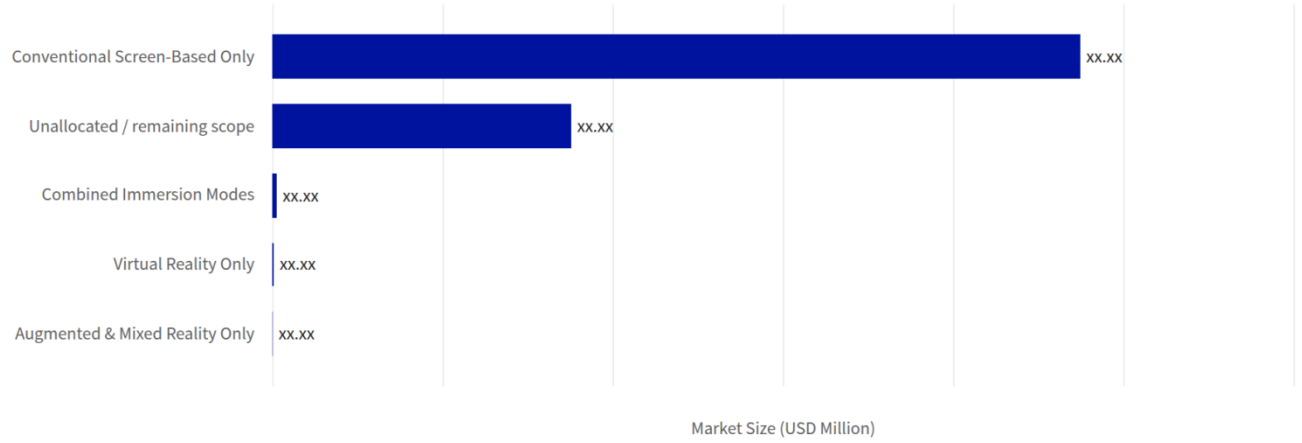

Table 74. Global Gaming Market, by Immersion Technology growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 75. Global Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Is there cross-buy?
   - Demeo's documented cross-buy relationships differ by purchasing platform; a game family's modes do not establish entitlement to every storefront version. ([resolutiongames.zendesk.com](https://resolutiongames.zendesk.com/hc/en-us/articles/xx.xx-Is-there-cross-buy))
2. Beat Saber on Steam
   - The official Steam product listing identifies Beat Saber as VR Only, establishing a title-specific mandatory immersive requirement. ([store.steampowered.com](https://store.steampowered.com/app/xx.xx/Beat_Saber/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
3. Demeo on Steam
   - The official Steam listing designates Demeo as VR Supported, contrasting with the VR Only designation and supporting an edition-specific optional-immersion comparison. ([store.steampowered.com](https://store.steampowered.com/app/xx.xx/Demeo/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
4. Demeo - Your New Favorite Tabletop Adventure Game
   - Resolution Games documents Demeo mixed-reality gameplay on Quest and broader immersive offerings; the page does not establish every edition's complete mode entitlement. ([resolutiongames.com](https://www.resolutiongames.com/demeo))
5. Mixed Reality Game Starship Home
   - CREATURE identifies Starship Home as a mixed-reality game for Meta Quest xx.xx. This establishes named positioning, not comprehensive exclusivity or compatibility across every edition and Quest device. ([creature.page](https://www.creature.page/starship-home))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
6. Kids and Video Games - Federal Trade Commission Consumer Advice
   - Taxonomy evidence: The guidance recognizes consumer games in virtual- and augmented-reality environments.
7. OECD Digital Economy Outlook 2024, Volume 1 - Virtual Reality and Its Opportunities and Risks
   - Taxonomy evidence: The chapter distinguishes VR from AR/MR and notes inconsistent immersive-technology terminology. The AR/MR grouping is an analytical choice to avoid overlapping labels. ([oecd.org](https://www.oecd.org/en/publications/2024/xx.xx/oecd-digital-economy-outlook-2024-volume-1_d30a04c9/full-report/component-xx.xx.html))
8. WebXR Augmented Reality Module - Level 1
   - Taxonomy evidence: It distinguishes AR output intended for integration with the user's environment from the VR session model.

9. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
10. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
11. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
12. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
13. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
14. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
15. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
16. GDC 2025: The Past, Present and Future of Developing VR and MR
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.

17. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
18. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
19. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
20. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.

9.1. Conventional Screen-Based Only

Table 76. Global Gaming Market Size, by Conventional Screen-Based Only, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 77. Global Gaming Market Size, by Conventional Screen-Based Only, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 78. Global Gaming Market Size, by Conventional Screen-Based Only, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. How We're Responding to Renewed Interest in Immersive Technologies

   · Taxonomy evidence: The June xx.xx 2023 explanation distinguishes nonimmersive gameplay examples from immersive technologies.
   ([ofcom.org.uk](https://www.ofcom.org.uk/internet-based-services/technology/how-were-responding-to-renewed-interest-in-immersive-technologies))

2. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
3. FY26.1Q Supplemental Information
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
4. Microsoft Corporation 2025 Proxy Statement
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
5. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
6. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
7. Nintendo Co., Ltd. Annual Report 2021
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
8. Apple services enrich peoples' lives throughout the year
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

9. Measuring digital development: Facts and Figures 2025 - Internet use
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
10. United Nations World Statistics Pocketbook 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
14. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
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16. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
17. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
18. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

19. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
20. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
21. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
22. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
23. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

9.2. Combined Immersion Modes

Table 79. Global Gaming Market Size, by Combined Immersion Modes, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 80. Global Gaming Market Size, by Combined Immersion Modes, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 81. Global Gaming Market Size, by Combined Immersion Modes, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. WebXR Augmented Reality Module - Level 1

   · Taxonomy evidence: The specification permits compatible systems to support VR sessions, AR sessions, or both. This is configuration evidence, not proof of a marketed game or device launch. ([w3.org](https://www.w3.org/TR/webxr-ar-module-xx.xx/))

2. An Empirical Study of Trends of Popular Virtual Reality Games and Their Complaints

· Taxonomy evidence: The empirical study explicitly distinguishes games requiring VR hardware from games with optional VR support, substantiating the conventional/VR combined configuration without current market-share claims.
([asgaard.ece.ualberta.ca](https://asgaard.ece.ualberta.ca/papers/Journal/IEEE_2021_Epp_An_Empirical_Study_of_Trends_of_Popular_Virtual_Reality_Games_and_Their_Complaints.pdf))

3. Apple celebrates a groundbreaking year in entertainment

· Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

4. FY26.1Q Supplemental Information

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.

5. Microsoft Corporation 2025 Proxy Statement

· Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.

6. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

7. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.

8. Nintendo Co., Ltd. Annual Report 2021

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

9. Apple services enrich peoples' lives throughout the year

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

10. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
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23. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
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24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
25. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
26. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
27. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.

28. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.

9.3. Virtual Reality Only

Table 82. Global Gaming Market Size, by Virtual Reality Only, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 83. Global Gaming Market Size, by Virtual Reality Only, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 84. Global Gaming Market Size, by Virtual Reality Only, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. How We're Responding to Renewed Interest in Immersive Technologies
   - Taxonomy evidence: It identifies headset-based virtual experiences as VR, supporting the VR family rather than proving edition-level exclusivity.
2. An Empirical Study of Trends of Popular Virtual Reality Games and Their Complaints
   - Taxonomy evidence: The study defines VR-only games by their requirement for VR hardware.
3. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
4. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
5. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.

6. ITU’s Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

7. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.

8. Nintendo Co., Ltd. Annual Report 2021

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

9. Apple services enrich peoples’ lives throughout the year

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

10. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
11. United Nations World Statistics Pocketbook 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

12. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
13. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
14. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
15. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
16. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

17. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
18. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
19. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

20. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
21. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
22. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
23. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
25. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
26. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
27. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.

28. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.

9.4. Augmented & Mixed Reality Only

Table 85. Global Gaming Market Size, by Augmented & Mixed Reality Only, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 86. Global Gaming Market Size, by Augmented & Mixed Reality Only, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 87. Global Gaming Market Size, by Augmented & Mixed Reality Only, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. OECD Digital Economy Outlook 2024, Volume 1 - Virtual Reality and Its Opportunities and Risks
   - Taxonomy evidence: AR is described as combining the real world with a digital layer, including camera-based phone/tablet gameplay; exclusivity of any marketed edition is not established.
2. How We're Responding to Renewed Interest in Immersive Technologies
   - Taxonomy evidence: AR overlays digital content on the real world; MR blends physical and digital objects in interacting environments. Exclusivity remains unverified.
3. Apple celebrates a groundbreaking year in entertainment
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· Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
14. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
15. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
16. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

17. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
18. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
19. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

20. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
21. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
22. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
23. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
25. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
26. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.

10. Gaming Market, by Primary Play Purpose

Primary Play Purpose changes the purchasing relationship, not simply the content theme. Recreation & Entertainment can be supplied through a personal-use entitlement: Steam's standard agreement licenses content for personal, noncommercial use, subject to stated exceptions. ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪

Learning & Education spans household and institutional budgets. ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ Institutions need license administration, while households need confirmation that the selected plan includes their intended learning games.

▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ Retailers should verify the complete package before a console transition or gift purchase. Fitness positioning does not itself establish an individual user's exercise outcome.

Figure 14. Global Gaming Market Size, by Primary Play Purpose, 2025 (%)

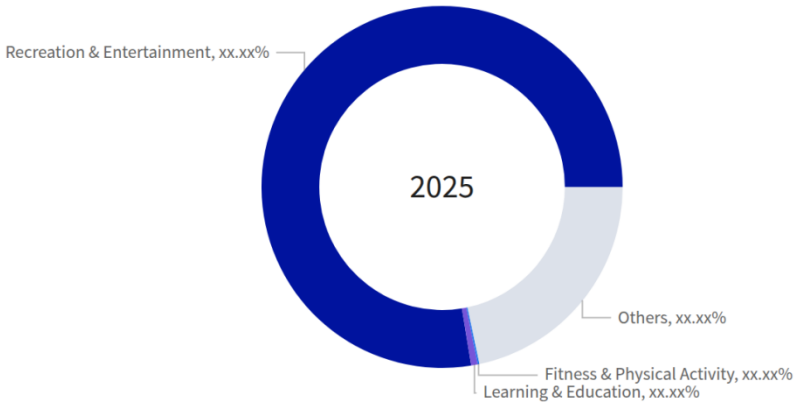

Figure 15. Global Gaming Market, by Primary Play Purpose, 2032 (USD Million)

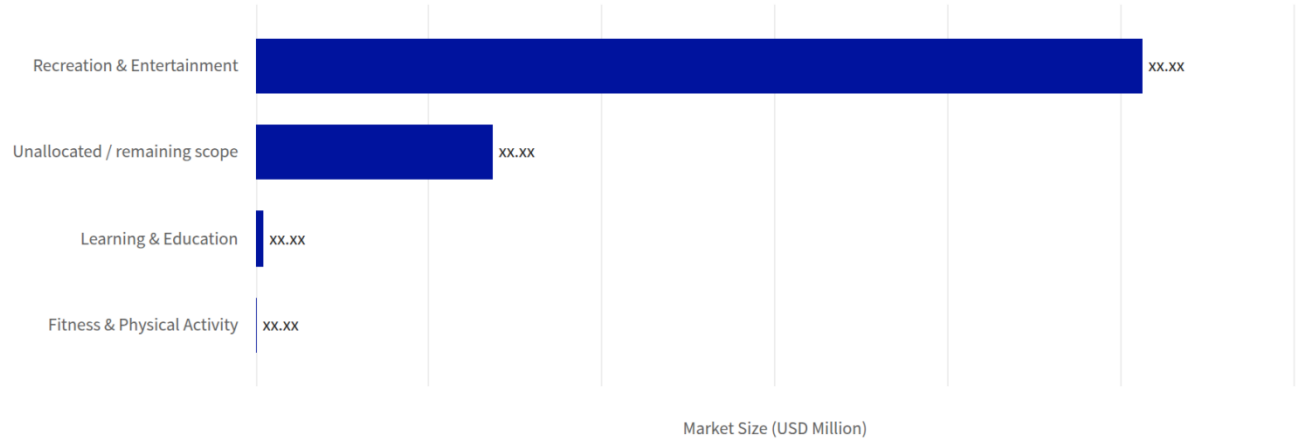

Table 88. Global Gaming Market, by Primary Play Purpose growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 89. Global Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Steam Subscriber Agreement

   · Steam's standard content license is for personal, noncommercial use, subject to stated exceptions; it does not automatically establish another purchaser's institutional rights. ([store.steampowered.com](https://store.steampowered.com/subscriber_agreement/))

2. Ring Fit Adventure Q&A - Nintendo UK
   · Nintendo's UK guidance requires original Joy-Con controllers and a compatible charging arrangement for Ring Fit Adventure on Nintendo Switch xx.xx.
   ([nintendo.com](https://www.nintendo.com/en-gb/Support/Purchases-Subscriptions/Games/Ring-Fit-Adventure-Q-A-xx.xx.html))
3. Purchasing Options for Minecraft Education Licenses
   · Minecraft Education distinguishes academic eligibility and commercial purchasing while providing the same game features; eligible institutions can buy through administrators or licensing partners and should check existing licenses.
   ([edusupport.minecraft.net](https://edusupport.minecraft.net/hc/en-us/articles/xx.xx-Purchasing-Options-for-Minecraft-Education-Licenses))
4. Choose plan | Kahoot!+ Study
   · Kahoot!+ Study lists learning-game applications and parent-managed Kahoot! Kids profiles for personal at-home use, supporting a household educational purchasing relationship.
   ([kahoot.com](https://kahoot.com/register/kahoot-study-pricing/))
5. Getting Children Moving Using Active Video Games: A Report of the GenMove Programme
   · Taxonomy evidence: An explicitly physical-activity-oriented game application supports distinguishing marketed purpose from interface technology or recreational genre. Restricting this axis to qualifying consumer playable offerings remains the study's boundary rule.
   ([who.int](https://www.who.int/publications/b/xx.xx))
6. NAPCS Product List for NAICS 5112, 518 and 54151
   · Taxonomy evidence: The legacy official software-product classification recognizes personal-use entertainment, education, and computer games together. It supports distinguishing intended consumer outcomes, but does not prescribe this three-part purpose partition.
   ([www2.census.gov](https://www2.census.gov/library/reference/napcs/product-list/web-xx.xx-xx.xx-xx.xx-final-reformatted-edited-us111009.pdf))
7. Getting children moving using active video games: a report of the GenMove programme
   · Taxonomy evidence: The 2025 intergovernmental report distinguishes movement arising incidentally from entertainment games from games designed around explicit physical-activity objectives. This supports classifying primary purpose separately from interface or movement mechanics.
   ([sportanddev.org](https://www.sportanddev.org/sites/default/files/2025-xx.xx/xx.xx-eng.pdf))
8. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
9. FY26.1Q Supplemental Information
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
10. Microsoft Corporation 2025 Proxy Statement
    · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
11. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
    · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
12. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.

13. Nintendo Co., Ltd. Annual Report 2021

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

14. Apple services enrich peoples' lives throughout the year

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

15. Minecraft Franchise Fact Sheet - October 2021

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.

16. Minecraft Education - Licensing and Purchasing

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.

17. FitXR Help Center - How Much Does a FitXR Membership Cost?

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.

18. Nintendo Support - Ring Fit Adventure Q&A

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.

10.1. Recreation & Entertainment

Table 90. Global Gaming Market Size, by Recreation & Entertainment, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 91. Global Gaming Market Size, by Recreation & Entertainment, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 92. Global Gaming Market Size, by Recreation & Entertainment, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. NAPCS Product List for NAICS 5112, 518 and 54151

   · Taxonomy evidence: The classification includes software intended for entertainment in the home and explicitly includes computer games, supporting recreational consumer play as an application. ([www2.census.gov](https://www2.census.gov/library/reference/napcs/product-list/web-xx.xx-xx.xx-xx.xx-final-reformatted-edited-us111009.pdf))

2. Getting children moving using active video games: a report of the GenMove programme

   · Taxonomy evidence: The report explicitly notes that some active games retain entertainment as their primary purpose, supporting retention of recreational movement-based games within entertainment when exercise is incidental. ([sportanddev.org](https://www.sportanddev.org/sites/default/files/2025-xx.xx/xx.xx-eng.pdf))

3. Children and Parents: Media Use and Attitudes Report

   · Taxonomy evidence: The report treats gaming as a free-time activity and describes entertainment and social interaction in its qualitative gaming findings. These observations support recreational purpose, not Global demand proportions. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/media-literacy-research/children/2026-children-and-parents-report/children-and-parents-media-use-and-attitudes-report-2025-xx.xx.pdf?v=xx.xx))

4. Adults' Media Use and Attitudes Report
   · Taxonomy evidence: A qualitative participant describes gaming primarily to maintain social connections. This supports including social play within recreational purpose, without treating the example as a population estimate.
   ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/media-literacy-research/adults/adults-media-use-and-attitudes-2026/adults-media-use-and-attitudes-2026-report.pdf?v=xx.xx))
5. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
6. FY26.1Q Supplemental Information
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
7. Microsoft Corporation 2025 Proxy Statement
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
8. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
9. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
10. Nintendo Co., Ltd. Annual Report 2021
    · Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
    · Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
11. Apple services enrich peoples' lives throughout the year
    · Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

12. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
13. United Nations World Statistics Pocketbook 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

14. Eurostat - Culture statistics: use of ICT for cultural purposes
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
17. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
18. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

19. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
20. NVIDIA - What are the supported locations for GeForce NOW?
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
21. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

22. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
23. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
24. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
25. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
26. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

10.2. Learning & Education

Table 93. Global Gaming Market Size, by Learning & Education, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 94. Global Gaming Market Size, by Learning & Education, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 95. Global Gaming Market Size, by Learning & Education, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. NAPCS Product List for NAICS 5112, 518 and 54151

   · Taxonomy evidence: The classification includes software combining educational and entertaining functions, including products for young children. Its broader software coverage does not make every educational application an in-scope playable game.
   ([www2.census.gov](https://www2.census.gov/library/reference/napcs/product-list/web-xx.xx-xx.xx-xx.xx-final-reformatted-edited-us111009.pdf))

2. Choose plan | Kahoot!+ Study
   - Taxonomy evidence: The official personal-study plans include reading, mathematics, and chess learning-game applications and describe parent-managed profiles for personal home use. This corroborates a current consumer commercial application; institutional licenses and nongame study features are not thereby included in Gaming. ([kahoot.com](https://kahoot.com/register/kahoot-study-pricing/))
3. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
4. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
5. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
6. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
7. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
8. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
9. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

10. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
22. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
23. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
25. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
26. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.

10.3. Fitness & Physical Activity

Table 96. Global Gaming Market Size, by Fitness & Physical Activity, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 97. Global Gaming Market Size, by Fitness & Physical Activity, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 98. Global Gaming Market Size, by Fitness & Physical Activity, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Getting Children Moving Using Active Video Games: A Report of the GenMove Programme

· Taxonomy evidence: The original WHO publication page identifies active video games and describes the GenMove programme as using game engagement to encourage physical activity. This supports the application-family identity, not consumer revenue, health efficacy, or automatic inclusion of institutional deployment. ([who.int](https://www.who.int/publications/b/xx.xx))

2. Getting children moving using active video games: a report of the GenMove programme

· Taxonomy evidence: The report identifies active video games as games involving physical movement and discusses their use in homes as well as institutional settings. Only the nonclinical consumer-play application is retained here; no efficacy claim is imported.
([sportanddev.org](https://www.sportanddev.org/sites/default/files/2025-xx.xx/xx.xx-eng.pdf))

3. Ring Fit Adventure Q&A

   · Taxonomy evidence: Nintendo's official Q&A presents Ring Fit Adventure as a commercial game combining an adventure with fitness activity and identifies a priced game/accessory bundle. This corroborates an actual consumer fitness-game offering, not category exhaustiveness, market share, or health efficacy. ([en-americas-support.nintendo.com](https://en-americas-support.nintendo.com/app/answers/detail/a_id/xx.xx/~/ring-fit-adventure-q%26a))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.

4. Apple celebrates a groundbreaking year in entertainment

   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

5. FY26.1Q Supplemental Information

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.

6. Microsoft Corporation 2025 Proxy Statement

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.

7. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

8. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.

9. Nintendo Co., Ltd. Annual Report 2021

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.

   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

10. Apple services enrich peoples' lives throughout the year

    · Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

11. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
12. United Nations World Statistics Pocketbook 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

13. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
14. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
15. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
16. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
17. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

18. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
19. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
20. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

21. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
22. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
23. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
24. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
25. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
26. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.

11. Gaming Market, by Player Age

[illegible] Suppliers should distinguish approval to purchase or play from permission for the relevant data disclosure. Neither gate should be assumed satisfied by the other.

Teenagers are not automatically an unrestricted purchasing audience. Apple's EU payment terms effective October xx.xx 2026 place alternative in-app purchases and out-of-app purchase offers for users aged xx.xx-xx.xx behind a parental gate. [illegible]

[illegible] Those observations cannot establish who controls a household budget or which subscription and genre each adult cohort prefers. Suppliers should verify the actual player, purchasing approver and title interest rather than treat a broad youth observation as an adult purchasing profile.

[illegible] An Older Adults proposition can be assessed against individual feature needs without assuming a preference for simplified games; the same screening can serve Young Adults and Middle-Aged Adults. A feature tag is a selection aid, not evidence of universal suitability or an age-specific purchase response.

Figure 16. Global Gaming Market Size, by Player Age, 2025 (%)

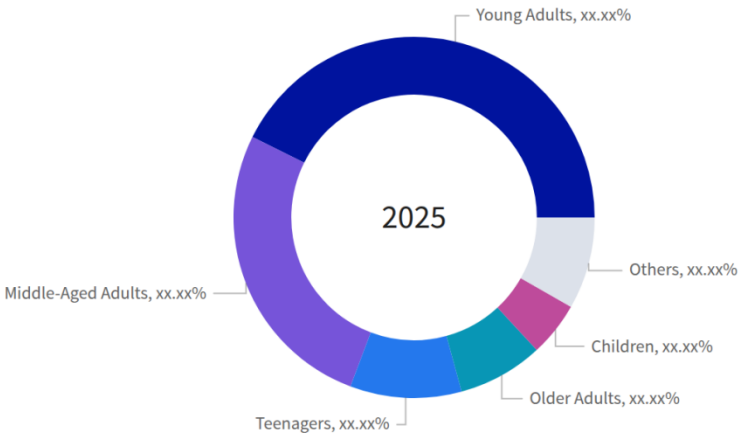

Figure 17. Global Gaming Market, by Player Age, 2032 (USD Million)

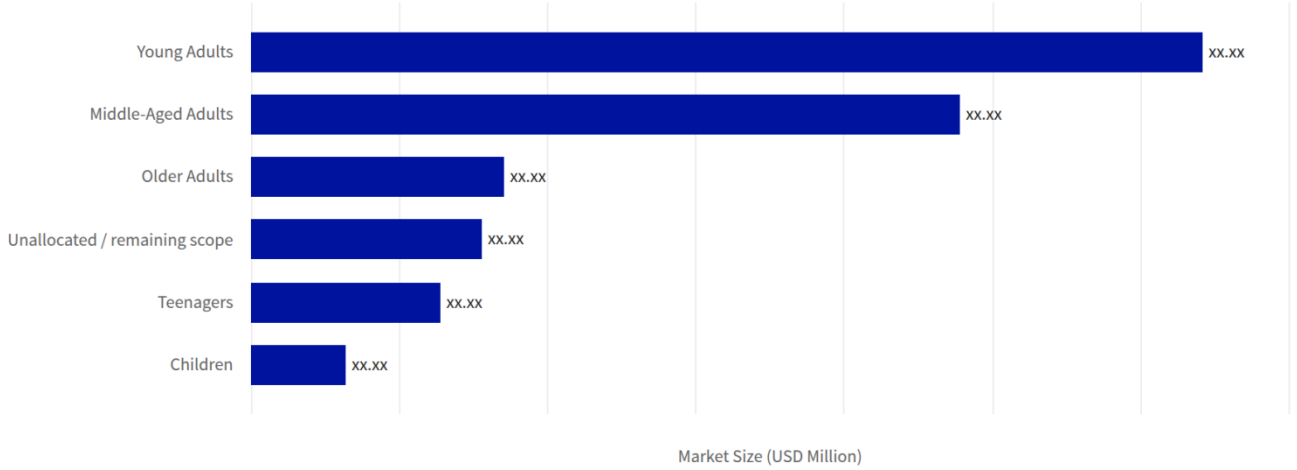

Table 99. Global Gaming Market, by Player Age growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 100. Global Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. How to set parental controls on PlayStation consoles

   · PlayStation states that child-account purchases use the family manager's wallet and documents spending controls, separating the player from purchasing authority. ([playstation.com](https://www.playstation.com/en-us/support/account/ps5-parental-controls-spending-limits/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.

2. Entertainment Software Association Introduces the Accessible Games Initiative to Provide Players with Information About Accessibility Features in Video Games

   · The Accessible Games Initiative provides voluntary feature disclosures, including clear text, narrated menus and save-anytime support, with implementation determined by participating companies. It does not establish age-specific preference or universal suitability. ([theesa.com](https://www.theesa.com/entertainment-software-association-introduces-the-accessible-games-initiative-to-provide-players-with-information-about-accessibility-features-in-video-games/))

3. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025

   · The COPPA rule defines a child as an individual under xx.xx and requires separate parental consent for covered nonintegral third-party disclosures, with different treatment for integral disclosures. ([govinfo.gov](https://www.govinfo.gov/content/pkg/FR-2025-xx.xx-xx.xx/html/2025-xx.xx.htm))

4. Payment options on the App Store in the EU

   · Apple's EU terms effective October xx.xx 2026 require parental gates for alternative in-app purchases and out-of-app offers for users aged xx.xx-xx.xx prohibit out-of-app offers for younger covered users, and recognize higher storefront thresholds. ([developer.apple.com](https://developer.apple.com/support/payment-options-on-the-app-store-in-the-eu))

5. Online activities of Canadian youth, cybervictimization and exposure to harmful content
   - Statistics Canada's April xx.xx 2025 publication analyzes the 2022 Canadian Internet Use Survey, records gameplay across adult age groups, and uses a youth grouping spanning teenage and adult players. These observations do not establish purchasing preferences. ([www150.statcan.gc.ca](https://www150.statcan.gc.ca/n1/pub/xx.xx-xx.xx-x/xx.xx-xx.xx-x2025002-eng.htm?wbdisable=false))
   - Taxonomy evidence: The April xx.xx 2025 publication analyzes the 2022 Canadian Internet Use Survey and reports online video-game participation by age. Its observations concern users, not spending or a Global 2025 market allocation. ([www150.statcan.gc.ca](https://www150.statcan.gc.ca/n1/pub/xx.xx-xx.xx-x/xx.xx-xx.xx-x2025002-eng.htm?wbdisable=false))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
6. Children and Parents: Media Use and Attitudes Report
   - Taxonomy evidence: The report published May xx.xx 2026 measures children's gaming and parental oversight separately. Younger-child observations use parent or guardian responses, while older children also answer directly; these are player observations, not purchaser-age expenditure data. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/media-literacy-research/children/2026-children-and-parents-report/children-and-parents-media-use-and-attitudes-report-2025-xx.xx.pdf?v=xx.xx))
7. Adults' Media Use and Attitudes Report
   - Taxonomy evidence: Published April xx.xx 2026, the report uses UK adult survey fieldwork conducted in September-November 2025 and documents gaming differences across adult ages. It supplies audience evidence rather than age-specific gaming receipts. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/media-literacy-research/adults/adults-media-use-and-attitudes-2026/adults-media-use-and-attitudes-2026-report.pdf?v=xx.xx))
8. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
9. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.

10. Microsoft Corporation 2025 Proxy Statement
· Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
11. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
12. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
· Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
13. Nintendo Co., Ltd. Annual Report 2021
· Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
· Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
14. Apple services enrich peoples' lives throughout the year
· Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
15. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.

11.1. Young Adults

Table 101. Global Gaming Market Size, by Young Adults, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 102. Global Gaming Market Size, by Young Adults, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 103. Global Gaming Market Size, by Young Adults, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Adults' Media Use and Attitudes Report

   · Taxonomy evidence: The report observes gaming among ages xx.xx-xx.xx. This corroborates gameplay within part of the proposed young-adult band, but the published grouping crosses its age-xx.xx lower boundary. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/media-literacy-research/adults/adults-media-use-and-attitudes-2026/adults-media-use-and-attitudes-2026-report.pdf?v=xx.xx))

2. Online activities of Canadian youth, cybervictimization and exposure to harmful content

   · Taxonomy evidence: The publication separately reports online gameplay for ages xx.xx-xx.xx and xx.xx-xx.xx. It supports young-adult participation, while leaving the exact xx.xx-xx.xx component unresolved. ([www150.statcan.gc.ca](https://www150.statcan.gc.ca/n1/pub/xx.xx-xx.xx-x/xx.xx-xx.xx-x2025002-eng.htm?wbdisable=false))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.

3. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
4. FY26.1Q Supplemental Information
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
5. Microsoft Corporation 2025 Proxy Statement
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
6. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
7. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
8. Nintendo Co., Ltd. Annual Report 2021
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
9. Apple services enrich peoples' lives throughout the year
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

10. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
11. United Nations World Statistics Pocketbook 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

12. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
13. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
14. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
15. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
16. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

17. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
18. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
19. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

20. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
21. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
22. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
23. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
25. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.

11.2. Middle-Aged Adults

Table 104. Global Gaming Market Size, by Middle-Aged Adults, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 105. Global Gaming Market Size, by Middle-Aged Adults, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 106. Global Gaming Market Size, by Middle-Aged Adults, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Online activities of Canadian youth, cybervictimization and exposure to harmful content

   · Taxonomy evidence: Online video-game participation is reported separately for ages xx.xx-xx.xx and xx.xx-xx.xx. Both observations fall wholly within the proposed xx.xx-xx.xx reporting band; no combined rate is calculated. ([www150.statcan.gc.ca](https://www150.statcan.gc.ca/n1/pub/xx.xx-xx.xx-x/xx.xx-xx.xx-x2025002-eng.htm?wbdisable=false))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.

2. Apple celebrates a groundbreaking year in entertainment

   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

3. FY26.1Q Supplemental Information

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.

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   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
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   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
8. Apple services enrich peoples' lives throughout the year
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

9. Measuring digital development: Facts and Figures 2025 - Internet use
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
15. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

16. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
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17. NVIDIA - What are the supported locations for GeForce NOW?
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
18. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

19. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
20. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
21. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
22. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
23. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

11.3. Teenagers

Table 107. Global Gaming Market Size, by Teenagers, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 108. Global Gaming Market Size, by Teenagers, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 109. Global Gaming Market Size, by Teenagers, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Children and Parents: Media Use and Attitudes Report

   · Taxonomy evidence: The report explicitly defines teenagers as ages xx.xx-xx.xx and separately discusses parental gaming rules for that group, supporting a teenage-player category distinct from parental purchasing roles.
   ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/media-literacy-research/children/2026-children-and-parents-report/children-and-parents-media-use-and-attitudes-report-2025-xx.xx.pdf?v=xx.xx))

2. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
3. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
4. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
5. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
6. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
7. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
8. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

9. Measuring digital development: Facts and Figures 2025 - Internet use
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

19. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
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21. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
22. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
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23. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
24. How to Set Parental Controls on PlayStation Consoles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.

11.4. Older Adults

Table 110. Global Gaming Market Size, by Older Adults, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 111. Global Gaming Market Size, by Older Adults, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 112. Global Gaming Market Size, by Older Adults, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Adults' Media Use and Attitudes Report

   · Taxonomy evidence: The report documents gaming among adults aged xx.xx and above, supporting inclusion of older players without an upper age ceiling. It does not establish the proposed band's Global prevalence. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/media-literacy-research/adults/adults-media-use-and-attitudes-2026/adults-media-use-and-attitudes-2026-report.pdf?v=xx.xx))

2. Online activities of Canadian youth, cybervictimization and exposure to harmful content

   · Taxonomy evidence: The publication explicitly reports online video-game participation for people aged xx.xx and above, directly supporting the existence of an older-player category with that reporting threshold. ([www150.statcan.gc.ca](https://www150.statcan.gc.ca/n1/pub/xx.xx-xx.xx-x/xx.xx-xx.xx-x2025002-eng.htm?wbdisable=false))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.

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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
19. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

20. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
21. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
22. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
23. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

11.5. Children

Table 113. Global Gaming Market Size, by Children, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 114. Global Gaming Market Size, by Children, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 115. Global Gaming Market Size, by Children, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Children and Parents: Media Use and Attitudes Report

   · Taxonomy evidence: Gaming is observed among younger children, including ages xx.xx-xx.xx and xx.xx-xx.xx within the proposed child band. The cited gaming findings do not establish demand below age three. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/media-literacy-research/children/2026-children-and-parents-report/children-and-parents-media-use-and-attitudes-report-2025-xx.xx.pdf?v=xx.xx))

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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
18. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

19. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
20. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
21. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
22. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
23. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
24. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
25. How to Set Parental Controls on PlayStation Consoles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.

12. Gaming Market, by Content Fulfillment Format

Content Fulfillment Format should follow the delivered game data rather than packaging alone. ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■ ■■■■ ■■■■■ ■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■ ■■ ■■■■ ■■■■ ■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■ ■ ■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■■■■■ ■ ■■■■ ■■ ■■■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■ The retained physical key requirement should not be confused with the game data being supplied on Physical Game Media.

■■■■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■ ■■■ ■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■ ■■■■■■■■ ■■■ ■■■■ ■■■■■ The arrangement provides a documented alternative to a blanket physical-versus-digital sharing assumption, but retains account and concurrency conditions. Multi-console households should compare the actual sharing entitlement before choosing a format.

Remedies follow the seller relationship as well as the fulfillment format. ■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■ ■ ■■■■■■■■■■■■■■■■■■ ■■■ ■■■ ■ ■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■ This distinction does not establish that physical or digital fulfillment is generally preferable; the relevant choice depends on delivery requirements and the transaction being offered.

Figure 18. Global Gaming Market Size, by Content Fulfillment Format, 2025 (%)

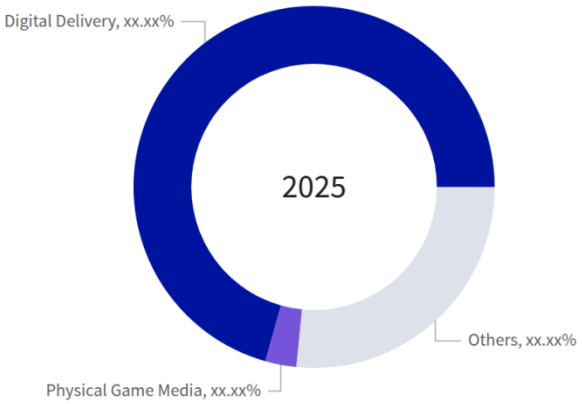

Figure 19. Global Gaming Market, by Content Fulfillment Format, 2032 (USD Million)

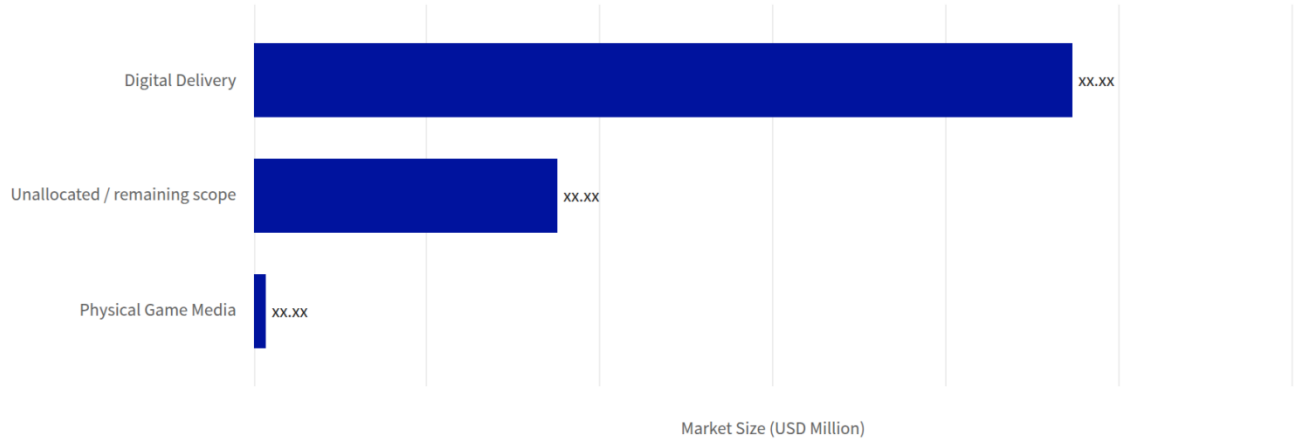

Table 116. Global Gaming Market, by Content Fulfillment Format growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 117. Global Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Steam Refunds

   · Valve provides refunds for qualifying Steam purchases but excludes third-party keys bought outside Steam; applicable consumer rights can provide additional remedies. ([store.steampowered.com](https://store.steampowered.com/steam_refunds/))

2. Nintendo Switch 2 - Game-Key Cards
   - Nintendo distinguishes standard cards from game-key cards, which contain no game data, require an initial download and available storage, and remain necessary for play. Downloaded-payload classification is an analytical fulfillment interpretation. ([nintendo.com](https://www.nintendo.com/en-gb/Hardware/Nintendo-Switch-xx.xx/Nintendo-Switch-xx.xx-Game-Key-Cards-xx.xx.html))
   - Taxonomy evidence: Nintendo describes game-key cards as physical cards with no game data. This demonstrates why physical packaging and playable-payload fulfillment must be distinguished in the study rule. ([nintendo.com](https://www.nintendo.com/en-gb/Hardware/Nintendo-Switch-xx.xx/Nintendo-Switch-xx.xx-Game-Key-Cards-xx.xx.html))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
3. Virtual Game Card Guide
   - Nintendo's Australian guidance permits Virtual Game Card lending within a Nintendo Account family group, requires nearby consoles, and prevents the lender from playing a lent game until its return. ([nintendo.com](https://www.nintendo.com/au/support/articles/virtual-game-card-guide/))
4. Microsoft / Activision Blizzard Merger Inquiry - Final Report
   - Taxonomy evidence: The 2023 report distinguishes physical game purchases from digital storefront distribution. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/644939aa529eda000c3b0525/Microsoft_Activision_Final_Report_.pdf))
5. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
6. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
7. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
8. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
9. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.

10. Nintendo Co., Ltd. Annual Report 2021
· Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
· Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
11. Apple services enrich peoples' lives throughout the year
· Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
12. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
13. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.

12.1. Digital Delivery

Table 118. Global Gaming Market Size, by Digital Delivery, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 119. Global Gaming Market Size, by Digital Delivery, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 120. Global Gaming Market Size, by Digital Delivery, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Microsoft / Activision Blizzard Merger Inquiry - Final Report

   · Taxonomy evidence: The report separately recognizes digital game acquisition through console storefronts. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/644939aa529eda000c3b0525/Microsoft_Activision_Final_Report_.pdf))

2. OECD - Tax Challenges Arising from Digitalisation: Report on Pillar One Blueprint
   - Taxonomy evidence: The 2020 framework includes streamed, accessed and downloaded games within digital content services.
   ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2020/xx.xx/tax-challenges-arising-from-digitalisation-report-on-pillar-one-blueprint_6034ca99/beba0634-en.pdf))
3. Nintendo - About Game-Key Cards
   - Taxonomy evidence: Game-key cards require the game data to be downloaded. Classifying that payload as digital is the study's disclosed analytical mapping, not Nintendo's retail-format terminology.
   ([nintendo.com](https://www.nintendo.com/en-gb/Hardware/Nintendo-Switch-xx.xx/Nintendo-Switch-xx.xx-Game-Key-Cards-xx.xx.html))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
4. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
5. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
6. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
7. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
8. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
9. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
10. Apple services enrich peoples' lives throughout the year
    - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

11. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
12. United Nations World Statistics Pocketbook 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

13. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
14. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
15. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
16. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
17. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

18. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
19. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
20. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

21. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
22. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
23. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
24. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
25. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
26. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.

12.2. Physical Game Media

Table 121. Global Gaming Market Size, by Physical Game Media, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 122. Global Gaming Market Size, by Physical Game Media, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 123. Global Gaming Market Size, by Physical Game Media, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Microsoft / Activision Blizzard Merger Inquiry - Final Report
   - Taxonomy evidence: Physical console games can be purchased through intermediaries or directly from console manufacturers. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/644939aa529eda000c3b0525/Microsoft_Activision_Final_Report_.pdf))
2. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
3. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
4. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.

5. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

6. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.

7. Nintendo Co., Ltd. Annual Report 2021

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

8. Apple services enrich peoples' lives throughout the year

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

9. Measuring digital development: Facts and Figures 2025 - Internet use
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
10. United Nations World Statistics Pocketbook 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

11. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
12. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
13. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
14. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
24. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
25. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
26. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.

13. Gaming Market, by Game Execution Model

Local Execution and Remote Execution place different dependencies in the purchasing relationship. ■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■ ■■■■ ■■■■■ ■■■■■ ■■■■■■■ ■■ ■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■ ■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ Local execution remains an alternative where compatible equipment is available, but does not by itself establish offline authorization.

Remote Execution also requires more than an existing game purchase. ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■ ■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■ ■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■ Neither relationship substitutes for the other.

Local & Remote Execution can provide flexibility without guaranteeing an interchangeable catalog. Microsoft's December 2025 guidance described Game Pass downloads alongside cloud access and streaming for selected separately owned games. ■ ■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■ ■■■■ ■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■ ■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■

Figure 20. Global Gaming Market Size, by Game Execution Model, 2025 (%)

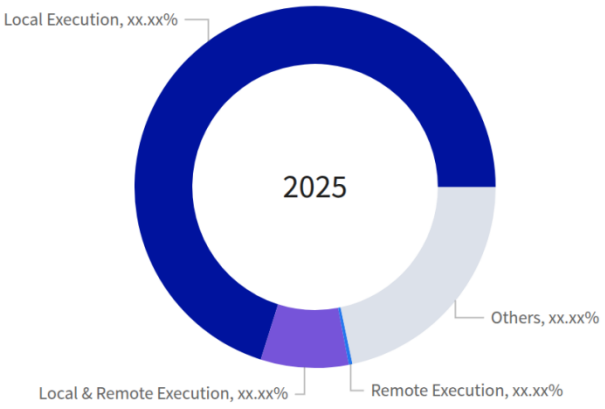

Figure 21. Global Gaming Market, by Game Execution Model, 2032 (USD Million)

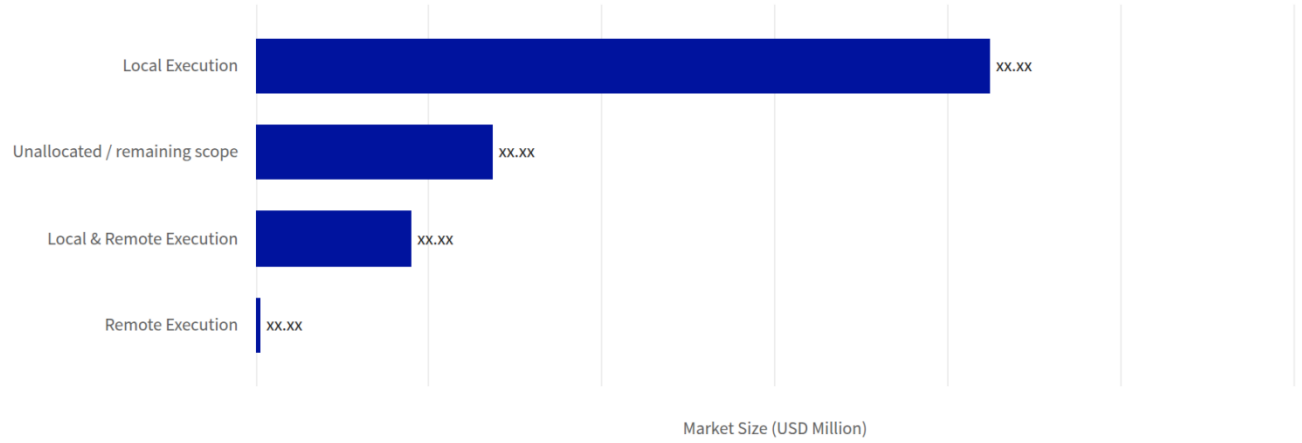

Table 124. Global Gaming Market, by Game Execution Model growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 125. Global Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. GeForce NOW FAQs
   - GeForce NOW generally requires ownership or purchase through a supported game store for paid games and documents supported-device access.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
2. Microsoft / Activision Blizzard (ex-cloud streaming rights) merger inquiry
   - The CMA's October 2023 consent excluded Activision's non-EEA cloud streaming rights; its record describes Ubisoft's transferred rights and different nonexclusive EEA arrangements.
3. WP6: Cloud Gaming Services: Nature of Competition and Requirements for Native Apps on Mobile Devices
   - The CMA's July 2024 working paper distinguishes local-device execution from cloud-server execution and identifies local equipment constraints, connection dependence and possible cloud-access queues.
   - Taxonomy evidence: The 2024 working paper distinguishes games run on the local user device from games running on data-center servers. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/6687b9fd899a6f92e5d9cd46/WP6_-_Cloud_gaming_services__nature_of_competition_and_requirements_for_native_apps_on_mobile_devices.pdf))
4. Getting Started with Xbox Cloud Gaming
   - Microsoft's December xx.xx 2025 guidance describes Game Pass downloads alongside cloud access and streaming for selected separately owned games. Universal title or edition equivalence is not established.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
5. CMA - Microsoft / Activision Blizzard: Phase 1 Decision
   - Taxonomy evidence: The September 2022 decision distinguishes downloading games to a device from streaming through a cloud-gaming provider. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/634536048fa8f5153767e533/MSFT.ABK_phase_1_decision_-_1.xx.xx.pdf))
6. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

7. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
8. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
9. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
10. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
11. Nintendo Co., Ltd. Annual Report 2021
    - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
    - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
12. Apple services enrich peoples' lives throughout the year
    - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
13. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.

14. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.

13.1. Local Execution

Table 126. Global Gaming Market Size, by Local Execution, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 127. Global Gaming Market Size, by Local Execution, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 128. Global Gaming Market Size, by Local Execution, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. CMA - Microsoft / Activision Blizzard: Phase 1 Decision
   · Taxonomy evidence: Downloaded game access is identified separately from cloud streaming. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/634536048fa8f5153767e533/MSFT.ABK_phase_1_decision_-_1.xx.xx.pdf))
2. CMA - WP6: Cloud Gaming Services: Nature of Competition and Requirements for Native Apps on Mobile Devices
   · Taxonomy evidence: Traditional gaming is described as local-device execution rather than cloud execution. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/6687b9fd899a6f92e5d9cd46/WP6_-_Cloud_gaming_services__nature_of_competition_and_requirements_for_native_apps_on_mobile_devices.pdf))
3. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
4. FY26.1Q Supplemental Information
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.

5. Microsoft Corporation 2025 Proxy Statement
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
6. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
7. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
8. Nintendo Co., Ltd. Annual Report 2021
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
9. Apple services enrich peoples' lives throughout the year
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

10. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
11. United Nations World Statistics Pocketbook 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

12. Eurostat - Culture statistics: use of ICT for cultural purposes
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.

13. Nintendo Co., Ltd. Annual Report 2026
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.

14. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.

15. Tencent Announces 2025 Annual and Fourth Quarter Results
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.

16. Roblox Corporation Form 10-K for the year ended December 31, 2025
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

17. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
18. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
19. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

20. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
21. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
22. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
23. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

13.2. Local & Remote Execution

Table 129. Global Gaming Market Size, by Local & Remote Execution, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 130. Global Gaming Market Size, by Local & Remote Execution, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 131. Global Gaming Market Size, by Local & Remote Execution, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. CMA - Microsoft / Activision Blizzard: Phase 1 Decision

   · Taxonomy evidence: The decision documents subscription services combining downloads and streaming, establishing the combined-entitlement pattern at that date. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/634536048fa8f5153767e533/MSFT.ABK_phase_1_decision_-_1.xx.xx.pdf))

2. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
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9. Measuring digital development: Facts and Figures 2025 - Internet use
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15. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
17. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
18. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

19. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
20. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
21. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
22. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
23. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
24. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
25. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
26. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.

13.3. Remote Execution

Table 132. Global Gaming Market Size, by Remote Execution, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 133. Global Gaming Market Size, by Remote Execution, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 134. Global Gaming Market Size, by Remote Execution, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. CMA - Microsoft / Activision Blizzard: Phase 1 Decision
   · Taxonomy evidence: Cloud-game streaming is identified as an alternative to downloading a game to the player's device. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/634536048fa8f5153767e533/MSFT.ABK_phase_1_decision_-_1.xx.xx.pdf))
2. CMA - WP6: Cloud Gaming Services: Nature of Competition and Requirements for Native Apps on Mobile Devices
   · Taxonomy evidence: Cloud execution runs the game on a server while consumers access it across supported device types. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/6687b9fd899a6f92e5d9cd46/WP6_-_Cloud_gaming_services__nature_of_competition_and_requirements_for_native_apps_on_mobile_devices.pdf))
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
18. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
19. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

20. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
21. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
22. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
23. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
25. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
26. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
27. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.

14. Gaming Market, by Connectivity Requirement

Offline Play requires separating initial fulfillment from subsequent authorization. ■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■■■■ Retailers should disclose initial connectivity requirements separately from the intended offline experience; buyers should check the edition and any optional connected features.

Periodic Online Validation permits disconnected sessions while retaining a continuing authorization gate. Nintendo's Australian guidance for the NES and Super NES Nintendo Switch Online collections requires active membership and online verification every seven days. ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■ ■■ ■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■ ■■ ■■■ ■■■■ ■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■ ■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■ ■■■■■ ■■■■■■■■ ■■■■■ ■■ ■■■■■■■■■■■■■

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Figure 22. Global Gaming Market Size, by Connectivity Requirement, 2025 (%)

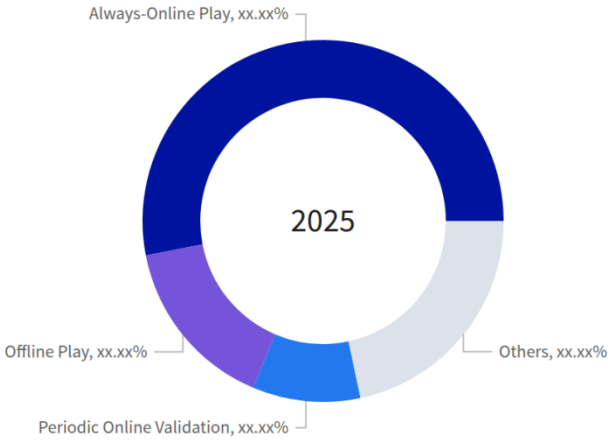

Figure 23. Global Gaming Market, by Connectivity Requirement, 2032 (USD Million)

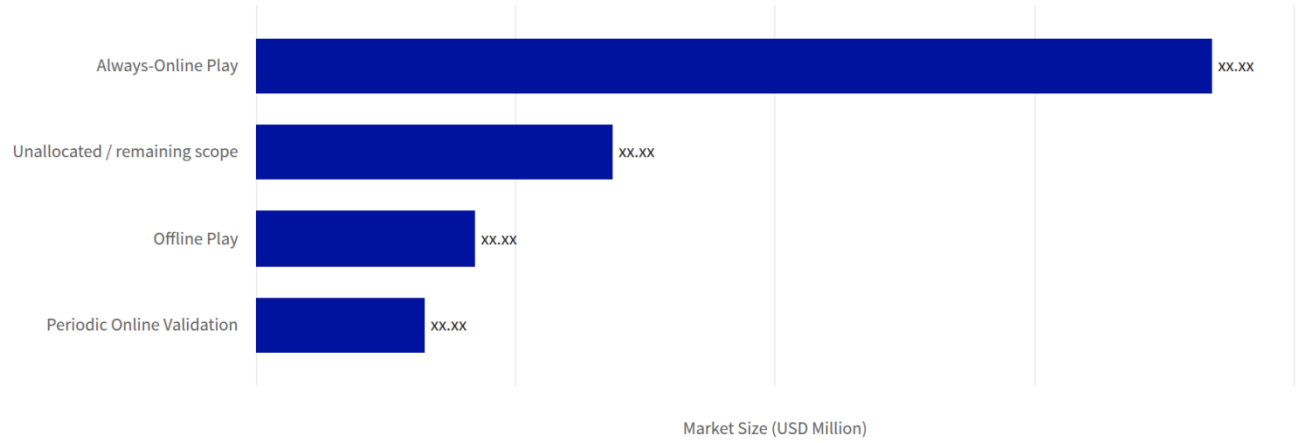

Table 135. Global Gaming Market, by Connectivity Requirement growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 136. Global Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Anthem Game Update - EA
   - EA's Anthem sunset notice states that the online-only game would become unplayable when servers went offline, including for previous purchasers. It establishes the announced dependency rather than independently verified shutdown completion.

2. Nintendo Switch 2 - Game-Key Cards
   - Nintendo's UK game-key card guidance requires an initial internet download and permits subsequent game startup without an internet connection.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
3. Introduction - GOG Developer Docs
   - GOG documents its client as optional, provides offline installers and distinguishes offline functionality from optional online functionality.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
4. Can These Classic Games Be Played Indefinitely?
   - Nintendo's Australian guidance permits offline play of the NES and Super NES Nintendo Switch Online collections while requiring active membership and online verification every seven days.
   - Taxonomy evidence: The documented combination of disconnected sessions and later mandatory verification supports separating periodic authorization from both unrestricted offline authorization and continuous online gameplay. This three-way taxonomy mapping is an analytical inference from the stated contract conditions. ([nintendo.com](https://www.nintendo.com/au/support/articles/can-these-classic-games-be-played-indefinitely/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
5. How Do I Run Games in Offline Mode Using the Epic Games Launcher?
   - Epic's launcher guidance permits offline play for supported single-player games already installed on the device.
6. Ofcom - Adults' Media Use and Attitudes 2025
   - Taxonomy evidence: Ofcom's 2025 report distinguishes games requiring internet access from games playable offline; it does not establish a separate periodic-validation reporting class. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/media-literacy-research/adults/adults-media-use-and-attitudes-2025/adults-media-use-and-attitudes-report-2025.pdf?v=xx.xx))
7. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
8. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.

9. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
10. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
    - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
11. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
12. Nintendo Co., Ltd. Annual Report 2021
    - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
    - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
13. Apple services enrich peoples' lives throughout the year
    - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
14. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.

14.1. Always-Online Play

Table 137. Global Gaming Market Size, by Always-Online Play, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 138. Global Gaming Market Size, by Always-Online Play, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 139. Global Gaming Market Size, by Always-Online Play, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. CMA - WP6: Cloud Gaming Services: Nature of Competition and Requirements for Native Apps on Mobile Devices

   · Taxonomy evidence: Cloud gameplay relies on the internet connection between the user and remote server. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/6687b9fd899a6f92e5d9cd46/WP6_-_Cloud_gaming_services__nature_of_competition_and_requirements_for_native_apps_on_mobile_devices.pdf))

2. Ofcom - Adults' Media Use and Attitudes 2025
   · Taxonomy evidence: Internet-dependent gaming is explicitly distinguished from offline-playable gaming. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/media-literacy-research/adults/adults-media-use-and-attitudes-2025/adults-media-use-and-attitudes-report-2025.pdf?v=xx.xx))
3. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
4. FY26.1Q Supplemental Information
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
5. Microsoft Corporation 2025 Proxy Statement
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
6. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
7. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
8. Nintendo Co., Ltd. Annual Report 2021
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
9. Apple services enrich peoples' lives throughout the year
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

10. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
11. United Nations World Statistics Pocketbook 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

12. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
13. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
14. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
15. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
16. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
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17. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
18. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
19. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

20. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
21. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
22. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
23. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

14.2. Offline Play

Table 140. Global Gaming Market Size, by Offline Play, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 141. Global Gaming Market Size, by Offline Play, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 142. Global Gaming Market Size, by Offline Play, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Ofcom - Adults' Media Use and Attitudes 2025

   · Taxonomy evidence: Offline-playable games are explicitly included in Ofcom's gaming definition, without establishing all entitlement-validation conditions. ([ofcom.org.uk](https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/media-literacy-research/adults/adults-media-use-and-attitudes-2025/adults-media-use-and-attitudes-report-2025.pdf?v=xx.xx))

2. Nintendo - About Game-Key Cards

· Taxonomy evidence: Nintendo states that the key-card format requires an initial internet download but can subsequently authorize game startup without an internet connection; game-specific online features remain a separate issue.
([nintendo.com](https://www.nintendo.com/en-gb/Hardware/Nintendo-Switch-xx.xx/Nintendo-Switch-xx.xx-Game-Key-Cards-xx.xx.html))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.

3. Epic Games Support - How Do I Run Games in Offline Mode Using the Epic Games Launcher?

· Taxonomy evidence: Epic states that eligible installed single-player games support offline launcher play, while online multiplayer and connected services may be unavailable. This supports distinguishing offline gameplay from optional online functionality, not indefinite authorization for every title.
([epicgames.com](https://www.epicgames.com/help/c-xx.xx/c-xx.xx/a19005803))

4. Apple celebrates a groundbreaking year in entertainment

· Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

5. FY26.1Q Supplemental Information

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.

6. Microsoft Corporation 2025 Proxy Statement

· Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.

7. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

8. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.

9. Nintendo Co., Ltd. Annual Report 2021

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

10. Apple services enrich peoples' lives throughout the year

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

11. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
12. United Nations World Statistics Pocketbook 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

13. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
14. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
15. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
16. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
26. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.

14.3. Periodic Online Validation

Table 143. Global Gaming Market Size, by Periodic Online Validation, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 144. Global Gaming Market Size, by Periodic Online Validation, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 145. Global Gaming Market Size, by Periodic Online Validation, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Can these classic games be played indefinitely? - Nintendo Support

   · Taxonomy evidence: Nintendo's current Australian support page permits offline play of the specified Nintendo Switch Online classic-game collections while requiring active membership and online membership verification every seven days. This directly establishes a periodic-validation entitlement pattern; it does not establish identical terms for all games, territories, or 2025 entitlements. ([nintendo.com](https://www.nintendo.com/au/support/articles/can-these-classic-games-be-played-indefinitely/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

2. Apple celebrates a groundbreaking year in entertainment

   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

3. FY26.1Q Supplemental Information
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
4. Microsoft Corporation 2025 Proxy Statement
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
5. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
6. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
7. Nintendo Co., Ltd. Annual Report 2021
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
8. Apple services enrich peoples' lives throughout the year
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

9. Measuring digital development: Facts and Figures 2025 - Internet use
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
10. United Nations World Statistics Pocketbook 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

11. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
12. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
13. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
14. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
15. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

16. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
17. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
18. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

19. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
20. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
21. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
22. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
23. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
24. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.

15. Gaming Market, by Distribution Channel

[illegible] Steam Keys allow external sales to activate a Steam license, but Valve's refund policy excludes purchases made outside Steam. Publishers extending resale therefore retain platform dependence and must establish authorized key distribution; purchasers should identify the seller responsible for remedies rather than assume identical protection from identical activation.

Direct Producer Sales can serve end users without supplying a wholesale route. [illegible] Households can compare the applicable direct-sale terms with a retailer's terms, but the existence of a producer-operated store does not establish worldwide delivery or eligibility.

Telecom & Cross-Service Bundles add a coordination relationship rather than replacing the gaming entitlement. EE's UK Game Pass guidance requires Microsoft-account activation and describes cancellation and repurchase conditions when an existing subscription moves into EE management. [illegible]

Figure 24. Global Gaming Market Size, by Distribution Channel, 2025 (%)

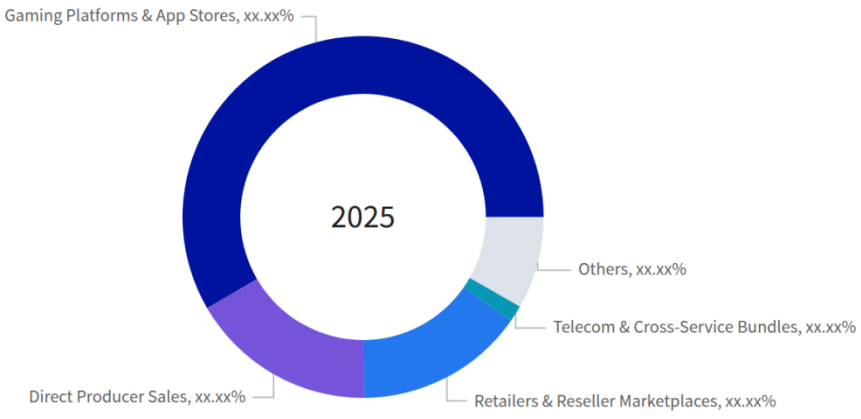

Figure 25. Global Gaming Market, by Distribution Channel, 2032 (USD Million)

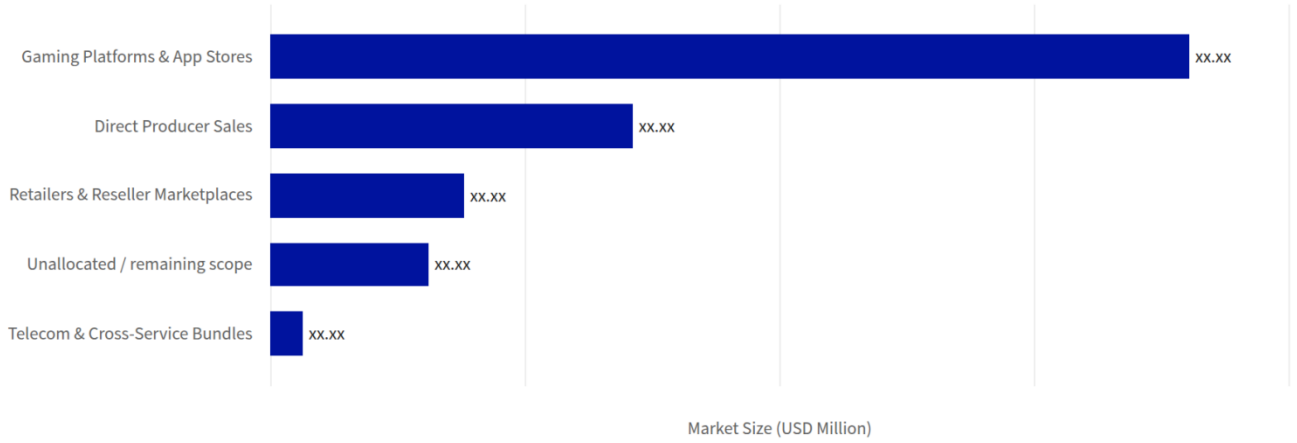

Table 146. Global Gaming Market, by Distribution Channel growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 147. Global Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Onboarding - Steamworks Documentation
   - Steam onboarding requires contractual acceptance, identity verification, bank and tax information, review, and adequate rights to distributed content.
2. Get Xbox Game Pass Ultimate on EE
   - EE's UK Game Pass guidance requires Microsoft-account activation and describes cancellation and repurchase conditions for moving an existing subscription into EE management.
3. Steam Refunds
   - Valve's refund policy applies to qualifying Steam purchases but excludes purchases made outside Steam, including third-party keys.
4. Steam Keys - Steamworks Documentation
   - Steam Keys allow retail or other-store sales to activate a Steam product license while retaining publisher key-distribution responsibilities.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
5. PlayStation Direct Terms of Use
   - PlayStation Direct's US terms require US billing and shipping addresses, exclude resellers and provide a separate direct-sale contractual relationship.
6. OECD - Online Computer and Video Games
   - Taxonomy evidence: This historical analysis distinguishes retail distribution, direct publisher distribution and internet intermediaries; no historical market estimates are used. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2005/xx.xx/online-computer-and-video-games_g17a1be3/xx.xx.pdf))
7. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
8. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
9. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
10. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
    - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

11. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
12. Nintendo Co., Ltd. Annual Report 2021
    - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
    - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
13. Apple services enrich peoples' lives throughout the year
    - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
14. Playtika Holding Corp. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
15. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
16. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.

15.1. Gaming Platforms & App Stores

Table 148. Global Gaming Market Size, by Gaming Platforms & App Stores, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 149. Global Gaming Market Size, by Gaming Platforms & App Stores, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 150. Global Gaming Market Size, by Gaming Platforms & App Stores, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Microsoft / Activision Blizzard Merger Inquiry - Final Report
   · Taxonomy evidence: Console storefronts perform game-distribution functions, including for their operators' associated services. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/644939aa529eda000c3b0525/Microsoft_Activision_Final_Report_.pdf))
2. CMA - WP6: Cloud Gaming Services: Nature of Competition and Requirements for Native Apps on Mobile Devices
   · Taxonomy evidence: The paper treats cloud catalogs as an alternative game-distribution mechanism to individual app-store downloads. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/6687b9fd899a6f92e5d9cd46/WP6_-_Cloud_gaming_services__nature_of_competition_and_requirements_for_native_apps_on_mobile_devices.pdf))
3. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

4. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
5. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
6. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
7. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
8. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
9. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

10. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
11. United Nations World Statistics Pocketbook 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

12. Eurostat - Culture statistics: use of ICT for cultural purposes
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.

13. Nintendo Co., Ltd. Annual Report 2026
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.

14. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.

15. Tencent Announces 2025 Annual and Fourth Quarter Results
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.

16. Roblox Corporation Form 10-K for the year ended December 31, 2025
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

17. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
18. NVIDIA - What are the supported locations for GeForce NOW?
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
19. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

20. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
21. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
22. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
23. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
25. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.

15.2. Direct Producer Sales

Table 151. Global Gaming Market Size, by Direct Producer Sales, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 152. Global Gaming Market Size, by Direct Producer Sales, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 153. Global Gaming Market Size, by Direct Producer Sales, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. OECD - Online Computer and Video Games
   · Taxonomy evidence: The analysis identifies publishers distributing directly to consumers rather than through the traditional retail chain. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2005/xx.xx/online-computer-and-video-games_g17a1be3/xx.xx.pdf))
2. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
3. FY26.1Q Supplemental Information
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
4. Microsoft Corporation 2025 Proxy Statement
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.

5. ITU’s Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

6. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.

7. Nintendo Co., Ltd. Annual Report 2021

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

8. Apple services enrich peoples’ lives throughout the year

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

9. Measuring digital development: Facts and Figures 2025 - Internet use
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
14. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

15.3. Retailers & Reseller Marketplaces

Table 154. Global Gaming Market Size, by Retailers & Reseller Marketplaces, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 155. Global Gaming Market Size, by Retailers & Reseller Marketplaces, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 156. Global Gaming Market Size, by Retailers & Reseller Marketplaces, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. OECD - Online Computer and Video Games

   · Taxonomy evidence: Retailers are described as consumer-facing merchants with pricing, presentation and supplier relationships. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2005/xx.xx/online-computer-and-video-games_g17a1be3/xx.xx.pdf))

2. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
3. FY26.1Q Supplemental Information
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
4. Microsoft Corporation 2025 Proxy Statement
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5. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
6. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
7. Nintendo Co., Ltd. Annual Report 2021
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
8. Apple services enrich peoples' lives throughout the year
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

9. Measuring digital development: Facts and Figures 2025 - Internet use
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
10. United Nations World Statistics Pocketbook 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

11. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
12. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
13. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
14. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
15. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

16. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
17. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
18. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

19. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
20. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
21. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
22. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
23. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
24. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
25. Steam Keys - Steamworks Documentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.

15.4. Telecom & Cross-Service Bundles

Table 157. Global Gaming Market Size, by Telecom & Cross-Service Bundles, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 158. Global Gaming Market Size, by Telecom & Cross-Service Bundles, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 159. Global Gaming Market Size, by Telecom & Cross-Service Bundles, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. CMA - WP6: Cloud Gaming Services: Nature of Competition and Requirements for Native Apps on Mobile Devices

   · Taxonomy evidence: The paper documents game access attached to a broader Prime membership, supporting a cross-service access pattern at that date, not its Global prevalence. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/6687b9fd899a6f92e5d9cd46/WP6_-_Cloud_gaming_services__nature_of_competition_and_requirements_for_native_apps_on_mobile_devices.pdf))

2. OECD - Online Computer and Video Games

   · Taxonomy evidence: Internet service providers and portals are identified as game-content aggregators and distribution intermediaries. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2005/xx.xx/online-computer-and-video-games_g17a1be3/xx.xx.pdf))

3. Apple celebrates a groundbreaking year in entertainment

   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
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14. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
15. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
16. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

17. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
18. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
19. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

20. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
21. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
22. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
23. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

16. Gaming Market, by Revenue Mechanism

Product Purchases and Subscription & Term-Access Fees create different access promises. Steam's standard content transaction grants a license rather than ownership of the underlying content. ■■■■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■ ■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■ ■■ ■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■

Add-On & Virtual-Item Purchases require their own transaction assessment. ■■■ ■■ ■■■ ■■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■ ■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■ ■■■■■■■ ■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■ Publishers should assess currency acquisition and subsequent spending together; using an intermediate currency does not remove consumer protections, and competent authorities and courts determine individual legality.

Usage-Based Play Fees can coexist with subscriptions rather than replace them. ■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ Buyers seeking continuity of premium benefits must consider the applicable allowance and reset conditions; accepting reduced benefits supplies a documented alternative to additional purchasing.

Game Advertising changes both the buyer and the admissible distribution setting. Steam's onboarding rules exclude applications with advertising-based business models, whereas Roblox documents opt-in Rewarded Video and advertiser purchasing relationships. ■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■ ■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■ ■■ ■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■■■■

Figure 26. Global Gaming Market Size, by Revenue Mechanism, 2025 (%)

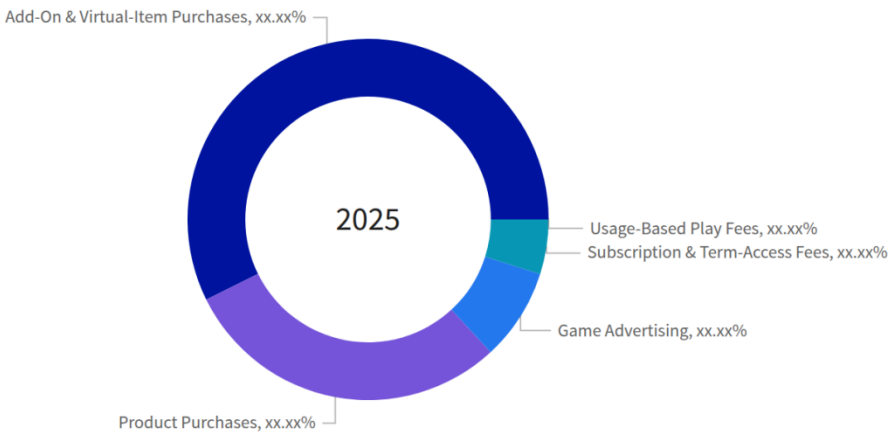

Figure 27. Global Gaming Market, by Revenue Mechanism, 2032 (USD Million)

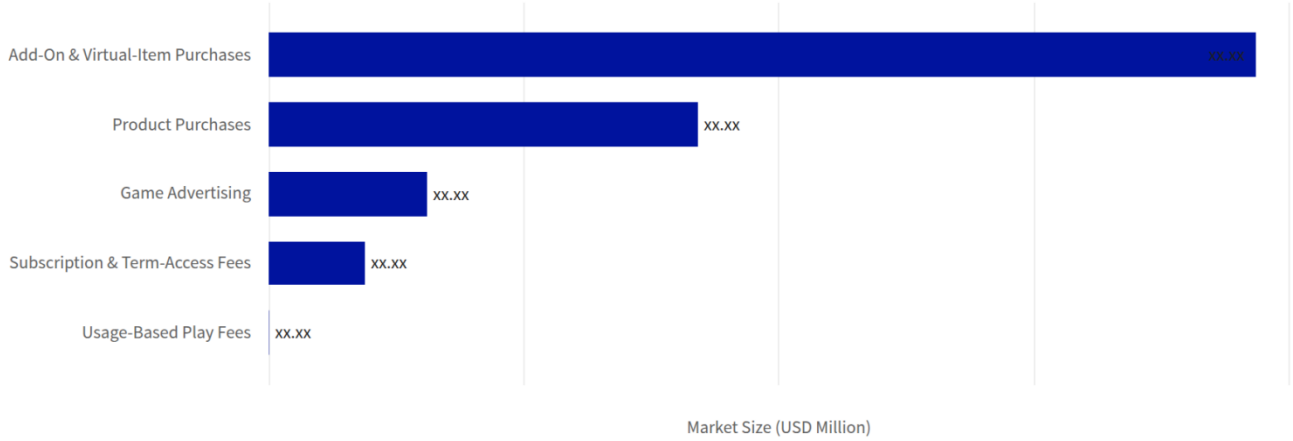

Table 160. Global Gaming Market, by Revenue Mechanism growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 161. Global Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Steam Subscriber Agreement
   - Steam's agreement grants a content license and states that content and services are licensed rather than sold.
2. Onboarding - Steamworks Documentation
   - Steam's onboarding rules list applications with advertising-based business models among content that should not be published.
3. PlayStation Plus - Membership Features and Frequently Asked Questions
   - PlayStation Plus documents recurring billing until cancellation, membership-dependent catalog access and departures of some catalog titles.
4. Roblox Expands Advertising Platform as Essential Channel for the Next Generations
   - Roblox's January xx.xx 2026 disclosure describes Rewarded Video as available and the Homepage Feature as in closed beta. Subsequent availability and campaign effectiveness are not established by that disclosure.
5. Consumer Protection Cooperation Network's Key Principles on In-Game Virtual Currencies
   - The March xx.xx 2025 CPC principles concern purchased in-game virtual currencies and explain consumer information, fairness and withdrawal expectations. Gameplay-only currencies are excluded; competent authorities and courts determine individual legality.
   - Taxonomy evidence: The March xx.xx 2025 principles describe purchased in-game virtual currencies as payment representations exchanged for digital game content or services. This supports separating payment denomination from the underlying receipt category. ([commission.europa.eu](https://commission.europa.eu/document/download/8af13e88-xx.xx-436c-b137-9853e7fe866a_en?filename=Key+principles+on+in-game+virtual+currencies.pdf))
6. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
   - Roblox's April xx.xx 2025 announcement describes opt-in Rewarded Video with in-game benefits and planned advertiser purchasing through Google's solutions and direct buying.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
7. Membership Terms for GeForce NOW
   - GeForce NOW's membership terms allow eligible paid members reaching their included premium allowance to purchase additional hours or continue with free-member features, with monthly reset conditions.

8. OECD - Online Computer and Video Games

   · Taxonomy evidence: The report separately analyzes retail purchases, subscription fees, pay-per-play and advertising as charging or funding models. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2005/xx.xx/online-computer-and-video-games_g17a1be3/xx.xx.pdf))

9. OECD - Tax Challenges Arising from Digitalisation: Report on Pillar One Blueprint

   · Taxonomy evidence: Gaming revenue discussions distinguish advertising, subscription access and purchases of additional game features; these are classification references, not current tax-law conclusions. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2020/xx.xx/tax-challenges-arising-from-digitalisation-report-on-pillar-one-blueprint_6034ca99/beba0634-en.pdf))

10. Apple celebrates a groundbreaking year in entertainment

    · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

11. FY26.1Q Supplemental Information

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.

12. Microsoft Corporation 2025 Proxy Statement

    · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.

13. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability

    · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

14. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.

15. Nintendo Co., Ltd. Annual Report 2021

    · Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.

    · Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

16. Apple services enrich peoples' lives throughout the year

    · Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

17. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.

18. NVIDIA Blog - Welcome to GeForce NOW Performance

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

16.1. Add-On & Virtual-Item Purchases

Table 162. Global Gaming Market Size, by Add-On & Virtual-Item Purchases, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 163. Global Gaming Market Size, by Add-On & Virtual-Item Purchases, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 164. Global Gaming Market Size, by Add-On & Virtual-Item Purchases, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Consumer Protection Cooperation Network - Key Principles on In-Game Virtual Currencies
   · Taxonomy evidence: The document recognizes purchases of in-game digital content and services using real money or purchased virtual currency. It does not make currency conversion an additional final-market sale in this study. ([commission.europa.eu](https://commission.europa.eu/document/download/8af13e88-xx.xx-436c-b137-9853e7fe866a_en?filename=Key+principles+on+in-game+virtual+currencies.pdf))
2. OECD - Tax Challenges Arising from Digitalisation: Report on Pillar One Blueprint
   · Taxonomy evidence: Additional levels and game accessories are identified as examples of microtransactions. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2020/xx.xx/tax-challenges-arising-from-digitalisation-report-on-pillar-one-blueprint_6034ca99/beba0634-en.pdf))
3. UK Gambling Commission - Written Evidence to the Immersive and Addictive Technologies Inquiry
   · Taxonomy evidence: The submission distinguishes upfront game purchases from additional monetization through purchased in-game items. ([committees.parliament.uk](https://committees.parliament.uk/writtenevidence/xx.xx/html/))
4. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

5. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
6. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
7. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
8. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
9. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
10. Apple services enrich peoples' lives throughout the year
    - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

11. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
20. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

21. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
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22. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
23. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
24. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
25. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
26. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.

16.2. Product Purchases

Table 165. Global Gaming Market Size, by Product Purchases, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 166. Global Gaming Market Size, by Product Purchases, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 167. Global Gaming Market Size, by Product Purchases, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Microsoft / Activision Blizzard Merger Inquiry - Final Report

   · Taxonomy evidence: The report distinguishes upfront game purchases from subsequent in-game purchasing.
   ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/644939aa529eda000c3b0525/Microsoft_Activision_Final_Report_.pdf))

2. Section 6B - Appliances, Household Equipment, and Other Selected Items

   · Taxonomy evidence: The official consumer-expenditure questionnaire identifies gaming-console and accessory acquisitions, separately excluding video games from that purchase class. This adds direct purchase-classification support for the included hardware/peripheral component of Product Purchases without establishing a Global value or denominator.
   ([census.gov](https://www.census.gov/programs-surveys/ce/information-booklet/section-6b.html))

3. CMA - Microsoft / Activision Blizzard: Phase 1 Decision

   · Taxonomy evidence: Buy-to-play is described as a one-time upfront payment for an individual game.
   ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/634536048fa8f5153767e533/MSFT.ABK_phase_1_decision_-_1.xx.xx.pdf))

4. Apple celebrates a groundbreaking year in entertainment

   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

5. FY26.1Q Supplemental Information

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.

6. Microsoft Corporation 2025 Proxy Statement

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.

7. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

8. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.

9. Nintendo Co., Ltd. Annual Report 2021

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.

   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

10. Apple services enrich peoples' lives throughout the year

    · Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

11. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

16.3. Game Advertising

Table 168. Global Gaming Market Size, by Game Advertising, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 169. Global Gaming Market Size, by Game Advertising, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 170. Global Gaming Market Size, by Game Advertising, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. OECD - Tax Challenges Arising from Digitalisation: Report on Pillar One Blueprint

   · Taxonomy evidence: Advertising within a game is identified as a gaming funding model. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2020/xx.xx/tax-challenges-arising-from-digitalisation-report-on-pillar-one-blueprint_6034ca99/beba0634-en.pdf))

2. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
3. FY26.1Q Supplemental Information
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5. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
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6. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
7. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
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9. Measuring digital development: Facts and Figures 2025 - Internet use
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
14. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
15. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

16. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
17. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
18. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

19. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
20. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
21. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
22. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
24. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.

16.4. Subscription & Term-Access Fees

Table 171. Global Gaming Market Size, by Subscription & Term-Access Fees, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 172. Global Gaming Market Size, by Subscription & Term-Access Fees, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 173. Global Gaming Market Size, by Subscription & Term-Access Fees, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. CMA - Microsoft / Activision Blizzard: Phase 1 Decision
   · Taxonomy evidence: Multi-game subscriptions provide paid access to a curated game catalog, separately from individual game purchases. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/634536048fa8f5153767e533/MSFT.ABK_phase_1_decision_-_1.xx.xx.pdf))
2. OECD - Tax Challenges Arising from Digitalisation: Report on Pillar One Blueprint
   · Taxonomy evidence: The framework describes players registering and paying subscription fees to access games. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2020/xx.xx/tax-challenges-arising-from-digitalisation-report-on-pillar-one-blueprint_6034ca99/beba0634-en.pdf))
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
18. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
19. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

20. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
21. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
22. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
23. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
25. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

16.5. Usage-Based Play Fees

Table 174. Global Gaming Market Size, by Usage-Based Play Fees, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 175. Global Gaming Market Size, by Usage-Based Play Fees, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 176. Global Gaming Market Size, by Usage-Based Play Fees, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. OECD - Online Computer and Video Games

   · Taxonomy evidence: Pay-per-play is a separately described historical model; venue examples are not imported into this study's excluded venue boundary. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2005/xx.xx/online-computer-and-video-games_g17a1be3/xx.xx.pdf))

2. NVIDIA - Frequently Asked Questions for GeForce NOW

   · Taxonomy evidence: The inspected U.S. FAQ permits purchases of additional streaming hours beyond a membership allowance. This establishes that supplier's usage-based charge, not a Global price, share or 2025 prevalence estimate. ([nvidia.com](https://www.nvidia.com/en-us/geforce-now/faq/))

3. Apple celebrates a groundbreaking year in entertainment

   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

4. FY26.1Q Supplemental Information

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.

5. Microsoft Corporation 2025 Proxy Statement
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
6. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
7. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
8. Nintendo Co., Ltd. Annual Report 2021
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
9. Apple services enrich peoples' lives throughout the year
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

10. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
11. United Nations World Statistics Pocketbook 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

12. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
13. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
14. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
15. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
16. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

17. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
25. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.

17. Gaming Market, by Game Genre

Game Genre affects discovery without creating universally separate commercial markets. The CMA recognized overlapping and changing genre assignments, while Steam distinguishes genre from player support and uses tags in browsing and recommendations. ■■■ ■■■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■ ■■■■■■■■■■■■ ■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■■ ■ ■■■■■ ■■■■■ ■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■ ■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■ ■■■■■■ ■■■■■■■■■■■■

Simulation & Sandbox and Idle & Incremental particularly illustrate why storefront labels should not override the accepted categories. ■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■ ■■■■■ ■■■■■ ■■■ ■■■■■ ■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ Buyers and publishers should compare the actual play proposition and edition rather than assume those labels identify interchangeable offerings or a common payment model.

Puzzle, Word & Trivia, and Board & Card also require channel-specific presentation: Google Play lists puzzle, word, trivia, board and card separately. The accepted composite categories therefore do not map directly to every storefront's labels. ■■■■■ ■ ■■■■■■ ■■■■ ■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■ ■■ ■■■■■ ■ ■■■■ ■■■■■■■■■■ ■■■ ■■■■ ■■■ ■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■

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Social Casino remains distinct from automatically expanding Gaming into wagering. ■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■ ■■ ■■■■■ ■■ ■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■ ■■■■ ■■■■■ ■■■■ ■■ ■ ■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■ ■ ■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■■■■■ Suppliers and distributors should verify the actual reward and redemption relationship under the applicable jurisdiction before relying on casino imagery or a storefront category as evidence of legal status.

Figure 28. Global Gaming Market Size, by Game Genre, 2025 (%)

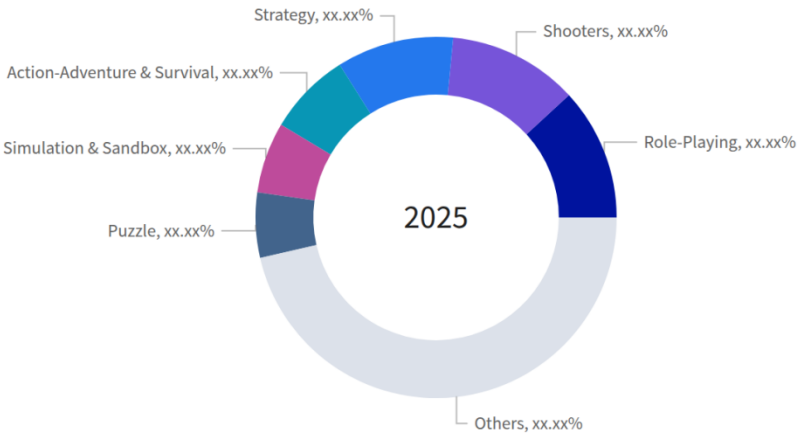

Figure 29. Global Gaming Market, by Game Genre, 2032 (USD Million)

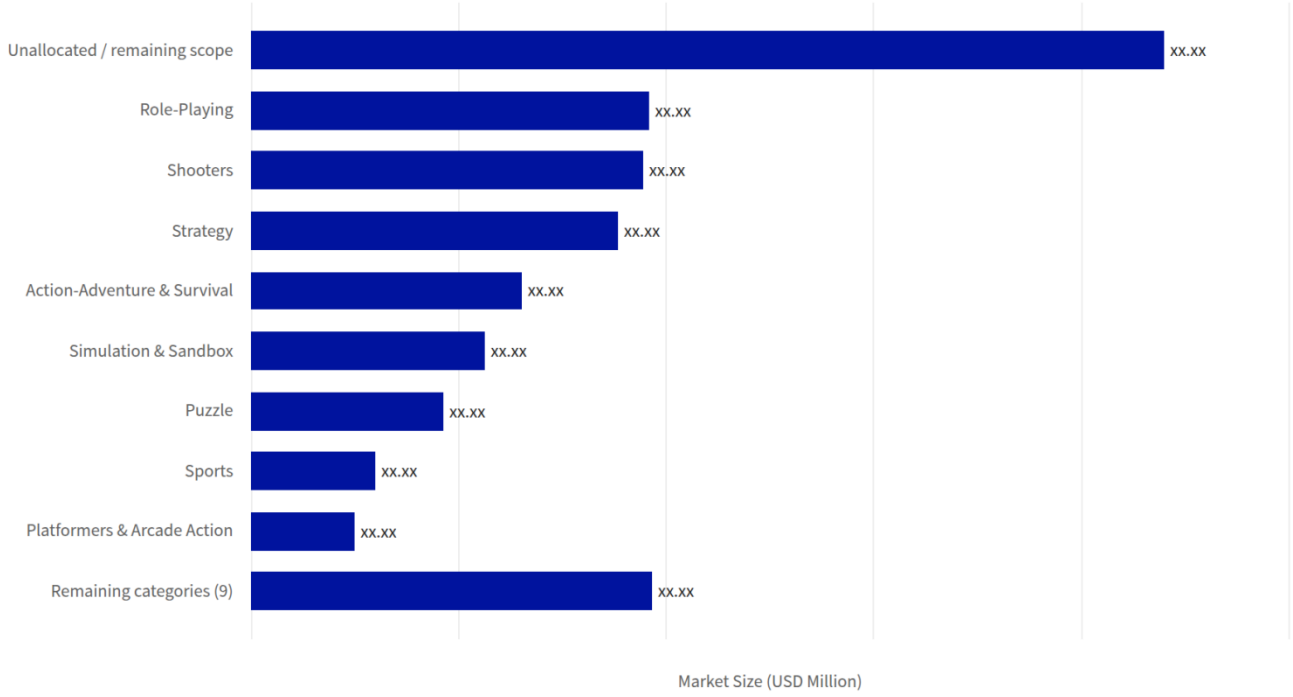

Table 177. Global Gaming Market, by Game Genre growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 178. Global Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025

- EA's fiscal 2025 Form xx.xx-K identifies licensed sports-league, team and player-association rights and risks from failing to maintain relevant licenses.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.

2. Microsoft / Activision Blizzard Merger Inquiry - Final Report
   - The CMA's April 2023 final report notes that genre definitions and assignments can overlap, change over time and differ across publishers and platforms; it did not define separate publishing markets by genre.
   - Taxonomy evidence: The CMA's final report, paragraphs xx.xx-xx.xx, explains that genre definitions and assignments can be arbitrary, change over time, and differ between publishers/platforms; it assesses the overall publishing market rather than defining separate legal markets by genre. This limits any claim that the retained reporting partition is a universal natural classification. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/644939aa529eda000c3b0525/Microsoft_Activision_Final_Report_.pdf))
   - Taxonomy evidence: The CMA recognizes commercial genre classification but notes overlapping labels and does not define separate legal markets by genre. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/644939aa529eda000c3b0525/Microsoft_Activision_Final_Report_.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
3. Steam Tags - Steamworks Documentation
   - Steam distinguishes genre and subgenre from features and player support; tags influence browsing and recommendations, and their relevance and weighting matter.
   - Taxonomy evidence: Steam's documentation separates genre and subgenre from visuals, themes, features and player support, supporting distinct classification questions rather than a single mixed tag axis. ([partner.steamgames.com](https://partner.steamgames.com/doc/store/tags?l=english))
4. Choose a Category and Tags for Your App or Game
   - Google Play uses categories and relevant tags for discovery and separately lists puzzle, word, trivia, board and card game categories.
   - Taxonomy evidence: Google Play's category guidance provides commercial discovery labels, not a universal cross-platform or mutually exclusive study taxonomy. ([support.google.com](https://support.google.com/googleplay/android-developer/answer/xx.xx?hl=en))
5. Cookie Clicker on Steam
   - Cookie Clicker's official Steam description identifies an idle game, while the displayed genre fields include Simulation and Strategy.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.

6. Just Dance - January Update
   - Ubisoft's January xx.xx 2025 announcement positioned Music Packs as an alternative to Just Dance+ subscriptions, specified eligible editions and retained subscription-exclusive tracks. Planned releases are not treated as completed availability.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
7. Gambling Commission Written Evidence to the Immersive and Addictive Technologies Inquiry
   - The Gambling Commission's January 2019 parliamentary submission describes social casino games without prizes of money or money's worth and explains their UK regulatory treatment at that time, not uniform Global treatment.
8. Plan Your Next Family Game Night - Jackbox Games
   - Jackbox documents shared participation after a host purchases the game, separating the purchaser from other players.
9. Playing to Wait: A Taxonomy of Idle Games
   - Taxonomy evidence: An independently researched idle/incremental family addresses an explicit gap in the retained genre partition. The publication establishes category identity, not current Global revenue, market share, or exhaustive coverage. ([researchgate.net](https://www.researchgate.net/profile/Sultan-Alharthi-xx.xx/publication/324658906_Playing_to_Wait_A_Taxonomy_of_Idle_Games/links/61865636d7d1af224bbaeea6/Playing-to-Wait-A-Taxonomy-of-Idle-Games.pdf))
10. Steam - Popular Tags
    - Taxonomy evidence: Steam's public tag index documents commercial discovery vocabulary; its multi-tag structure does not validate exclusive study allocations. ([store.steampowered.com](https://store.steampowered.com/tag/browse/))
11. Apple celebrates a groundbreaking year in entertainment
    - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
12. FY26.1Q Supplemental Information
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
13. Microsoft Corporation 2025 Proxy Statement
    - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
14. ITU’s Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
    - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
15. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.

16. Nintendo Co., Ltd. Annual Report 2021
    - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
    - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
17. Apple services enrich peoples' lives throughout the year
    - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
18. Playtika Holding Corp. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
19. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
20. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
21. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.

22. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
23. Capcom Q3 FY2025 Financial Results Presentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
24. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.

17.1. Role-Playing

Table 179. Global Gaming Market Size, by Role-Playing, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 180. Global Gaming Market Size, by Role-Playing, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 181. Global Gaming Market Size, by Role-Playing, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Microsoft / Activision Blizzard Merger Inquiry - Final Report
   · Taxonomy evidence: Role-playing is among the report's recognized commercial game genres. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/644939aa529eda000c3b0525/Microsoft_Activision_Final_Report_.pdf))
   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
2. Google Play Console Help - Choose a Category and Tags for Your App or Game
   · Taxonomy evidence: Role playing is a recognized game category. ([support.google.com](https://support.google.com/googleplay/android-developer/answer/xx.xx?hl=en))
3. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
4. FY26.1Q Supplemental Information
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
5. Microsoft Corporation 2025 Proxy Statement
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
6. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
7. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
8. Nintendo Co., Ltd. Annual Report 2021
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
9. Apple services enrich peoples' lives throughout the year
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

10. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
11. United Nations World Statistics Pocketbook 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

12. Eurostat - Culture statistics: use of ICT for cultural purposes
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.

13. Nintendo Co., Ltd. Annual Report 2026
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.

14. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.

15. Tencent Announces 2025 Annual and Fourth Quarter Results
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.

16. Roblox Corporation Form 10-K for the year ended December 31, 2025
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
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- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

17. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
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18. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
19. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

20. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
21. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
22. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
23. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
25. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
26. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.

17.2. Shooters

Table 182. Global Gaming Market Size, by Shooters, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 183. Global Gaming Market Size, by Shooters, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 184. Global Gaming Market Size, by Shooters, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Microsoft / Activision Blizzard Merger Inquiry - Final Report

   · Taxonomy evidence: Shooter is expressly recognized as a game genre. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/644939aa529eda000c3b0525/Microsoft_Activision_Final_Report_.pdf))

2. Steam - Popular Tags

   · Taxonomy evidence: Shooter and several shooter subgenre labels appear in the index. ([store.steampowered.com](https://store.steampowered.com/tag/browse/))

3. Apple celebrates a groundbreaking year in entertainment

   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

4. FY26.1Q Supplemental Information

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.

5. Microsoft Corporation 2025 Proxy Statement

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.

6. ITU’s Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

7. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.

8. Nintendo Co., Ltd. Annual Report 2021

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

9. Apple services enrich peoples’ lives throughout the year

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

10. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
11. United Nations World Statistics Pocketbook 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

12. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
13. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
14. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
15. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
19. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

20. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
22. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
23. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
25. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
26. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.

17.3. Strategy

Table 185. Global Gaming Market Size, by Strategy, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 186. Global Gaming Market Size, by Strategy, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 187. Global Gaming Market Size, by Strategy, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Microsoft / Activision Blizzard Merger Inquiry - Final Report
   · Taxonomy evidence: Strategy is among the report's recognized commercial game genres. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/644939aa529eda000c3b0525/Microsoft_Activision_Final_Report_.pdf))
2. Google Play Console Help - Choose a Category and Tags for Your App or Game
   · Taxonomy evidence: Strategy is a recognized game category. ([support.google.com](https://support.google.com/googleplay/android-developer/answer/xx.xx?hl=en))
3. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
4. FY26.1Q Supplemental Information
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
5. Microsoft Corporation 2025 Proxy Statement
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.

6. ITU’s Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

7. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.

8. Nintendo Co., Ltd. Annual Report 2021

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

9. Apple services enrich peoples’ lives throughout the year

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

10. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
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11. United Nations World Statistics Pocketbook 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
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16. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
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17. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

17.4. Action-Adventure & Survival

Table 188. Global Gaming Market Size, by Action-Adventure & Survival, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 189. Global Gaming Market Size, by Action-Adventure & Survival, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 190. Global Gaming Market Size, by Action-Adventure & Survival, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Steam - Popular Tags

   · Taxonomy evidence: Action-Adventure, Survival and Open World Survival Craft are documented labels. ([store.steampowered.com](https://store.steampowered.com/tag/browse/))

2. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
23. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
24. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
25. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.

17.5. Simulation & Sandbox

Table 191. Global Gaming Market Size, by Simulation & Sandbox, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 192. Global Gaming Market Size, by Simulation & Sandbox, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 193. Global Gaming Market Size, by Simulation & Sandbox, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Playing to Wait: A Taxonomy of Idle Games

   · Taxonomy evidence: The study distinguishes incremental accumulation-oriented games from simulation games. This supports reassessing the Simulation & Sandbox boundary rather than automatically absorbing every resource-accumulation game into simulation. The exclusive dominant-loop allocation remains the study's analytical rule. ([researchgate.net](https://www.researchgate.net/profile/Sultan-Alharthi-xx.xx/publication/324658906_Playing_to_Wait_A_Taxonomy_of_Idle_Games/links/61865636d7d1af224bbaeea6/Playing-to-Wait-A-Taxonomy-of-Idle-Games.pdf))

2. Google Play Console Help - Choose a Category and Tags for Your App or Game

   · Taxonomy evidence: Simulation is a recognized game category; this does not independently validate the study's sandbox aggregation. ([support.google.com](https://support.google.com/googleplay/android-developer/answer/xx.xx?hl=en))

3. Steam - Popular Tags

   · Taxonomy evidence: Sandbox, Management, Building and several simulation labels are documented. ([store.steampowered.com](https://store.steampowered.com/tag/browse/))

4. Apple celebrates a groundbreaking year in entertainment

   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

5. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
6. Microsoft Corporation 2025 Proxy Statement
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7. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
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8. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
9. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
10. Apple services enrich peoples' lives throughout the year
    - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

11. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
12. United Nations World Statistics Pocketbook 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

13. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
14. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
15. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
16. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
17. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.

18. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
19. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
20. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

21. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
22. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
23. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
24. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
25. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

17.6. Puzzle

Table 194. Global Gaming Market Size, by Puzzle, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 195. Global Gaming Market Size, by Puzzle, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 196. Global Gaming Market Size, by Puzzle, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Google Play Console Help - Choose a Category and Tags for Your App or Game
   · Taxonomy evidence: Puzzle is a recognized game category. ([support.google.com](https://support.google.com/googleplay/android-developer/answer/xx.xx?hl=en))
2. Apple celebrates a groundbreaking year in entertainment
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

11. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
14. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
15. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

16. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
17. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
18. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

19. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
20. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
21. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
22. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
23. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

17.7. Sports

Table 197. Global Gaming Market Size, by Sports, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 198. Global Gaming Market Size, by Sports, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 199. Global Gaming Market Size, by Sports, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Microsoft / Activision Blizzard Merger Inquiry - Final Report
   - Taxonomy evidence: Sport is among the report's recognized commercial game genres. ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/644939aa529eda000c3b0525/Microsoft_Activision_Final_Report_.pdf))
2. Google Play Console Help - Choose a Category and Tags for Your App or Game
   - Taxonomy evidence: Sports is a recognized game category. ([support.google.com](https://support.google.com/googleplay/android-developer/answer/xx.xx?hl=en))

3. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
4. FY26.1Q Supplemental Information
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
5. Microsoft Corporation 2025 Proxy Statement
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
6. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
7. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
8. Nintendo Co., Ltd. Annual Report 2021
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
9. Apple services enrich peoples' lives throughout the year
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

10. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
11. United Nations World Statistics Pocketbook 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

12. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

20. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
22. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
23. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
25. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
26. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.

17.8. Platformers & Arcade Action

Table 200. Global Gaming Market Size, by Platformers & Arcade Action, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 201. Global Gaming Market Size, by Platformers & Arcade Action, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 202. Global Gaming Market Size, by Platformers & Arcade Action, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Steamworks Documentation - Steam Tags
   · Taxonomy evidence: The documentation explicitly presents Action, Platformer and Precision Platformer at different genre depths. It does not establish the study's combined arcade partition. ([partner.steamgames.com](https://partner.steamgames.com/doc/store/tags?l=english))
2. Steam - Popular Tags
   · Taxonomy evidence: Platformer, Arcade and Runner are documented labels. ([store.steampowered.com](https://store.steampowered.com/tag/browse/))
3. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
4. FY26.1Q Supplemental Information
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
5. Microsoft Corporation 2025 Proxy Statement
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.

6. ITU’s Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

7. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.

8. Nintendo Co., Ltd. Annual Report 2021

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

9. Apple services enrich peoples’ lives throughout the year

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

10. Measuring digital development: Facts and Figures 2025 - Internet use
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
22. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
23. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

17.9. Board & Card

Table 203. Global Gaming Market Size, by Board & Card, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 204. Global Gaming Market Size, by Board & Card, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 205. Global Gaming Market Size, by Board & Card, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Google Play Console Help - Choose a Category and Tags for Your App or Game

   · Taxonomy evidence: Board and card are separately recognized game categories. ([support.google.com](https://support.google.com/googleplay/android-developer/answer/xx.xx?hl=en))

2. Apple celebrates a groundbreaking year in entertainment

   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

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21. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
22. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
23. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

17.10. Social Casino

Table 206. Global Gaming Market Size, by Social Casino, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 207. Global Gaming Market Size, by Social Casino, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 208. Global Gaming Market Size, by Social Casino, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. UK Gambling Commission - Written Evidence to the Immersive and Addictive Technologies Inquiry

   · Taxonomy evidence: The Gambling Commission's January 2019 submission identifies social casino as casino-style social gaming without prizes of money or money's worth. This supports the commercial distinction, not a current uniform Global legal classification. ([committees.parliament.uk](https://committees.parliament.uk/writtenevidence/xx.xx/html/))

2. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
3. FY26.1Q Supplemental Information
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6. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
7. Nintendo Co., Ltd. Annual Report 2021
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
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9. Measuring digital development: Facts and Figures 2025 - Internet use
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
10. United Nations World Statistics Pocketbook 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

11. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
13. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
14. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
15. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

16. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
17. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
18. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

19. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
20. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
21. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
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22. Australian Classification - New classifications for gambling-like content in video games
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23. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

17.11. Party & Social Play

Table 209. Global Gaming Market Size, by Party & Social Play, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 210. Global Gaming Market Size, by Party & Social Play, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 211. Global Gaming Market Size, by Party & Social Play, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Steam - Popular Tags

   · Taxonomy evidence: Party Game, Party and Minigames are documented labels, without establishing this study's social-play boundary. ([store.steampowered.com](https://store.steampowered.com/tag/browse/))

2. Apple celebrates a groundbreaking year in entertainment

   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
13. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
14. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
15. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.

16. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
17. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
18. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

19. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
20. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
21. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
22. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
23. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

17.12. Racing

Table 212. Global Gaming Market Size, by Racing, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 213. Global Gaming Market Size, by Racing, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 214. Global Gaming Market Size, by Racing, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Google Play Console Help - Choose a Category and Tags for Your App or Game

   · Taxonomy evidence: Racing is a recognized game category. ([support.google.com](https://support.google.com/googleplay/android-developer/answer/xx.xx?hl=en))

2. Apple celebrates a groundbreaking year in entertainment

   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

3. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
4. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
5. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
6. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
7. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
8. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

9. Measuring digital development: Facts and Figures 2025 - Internet use
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
10. United Nations World Statistics Pocketbook 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

11. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
12. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

16. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
18. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

19. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
20. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
21. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
22. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
23. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
24. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.

17.13. Fighting & Combat

Table 215. Global Gaming Market Size, by Fighting & Combat, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 216. Global Gaming Market Size, by Fighting & Combat, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 217. Global Gaming Market Size, by Fighting & Combat, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Steam - Popular Tags
   · Taxonomy evidence: Fighting, fighter and beat-'em-up labels are documented. ([store.steampowered.com](https://store.steampowered.com/tag/browse/))
2. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
3. FY26.1Q Supplemental Information
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
4. Microsoft Corporation 2025 Proxy Statement
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
5. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

6. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
7. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
8. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
9. Measuring digital development: Facts and Figures 2025 - Internet use
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.

10. United Nations World Statistics Pocketbook 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.
11. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
13. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.

14. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
15. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.
16. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
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17. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
18. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.
19. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
20. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
21. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.

22. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
23. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
24. Capcom Q3 FY2025 Financial Results Presentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.

17.14. Narrative Adventure

Table 218. Global Gaming Market Size, by Narrative Adventure, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 219. Global Gaming Market Size, by Narrative Adventure, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 220. Global Gaming Market Size, by Narrative Adventure, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Google Play Console Help - Choose a Category and Tags for Your App or Game

   · Taxonomy evidence: Adventure is a recognized Google Play game category; the study narrows this peer to narrative-led adventure. ([support.google.com](https://support.google.com/googleplay/android-developer/answer/xx.xx?hl=en))

2. Steam - Popular Tags

   · Taxonomy evidence: Visual Novel, Interactive Fiction and Narrative labels support the narrative-adventure vocabulary. ([store.steampowered.com](https://store.steampowered.com/tag/browse/))

3. Apple celebrates a groundbreaking year in entertainment

   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

4. FY26.1Q Supplemental Information

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.

5. Microsoft Corporation 2025 Proxy Statement

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.

6. ITU’s Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

7. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.

8. Nintendo Co., Ltd. Annual Report 2021

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

17.15. Idle & Incremental

Table 221. Global Gaming Market Size, by Idle & Incremental, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 222. Global Gaming Market Size, by Idle & Incremental, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 223. Global Gaming Market Size, by Idle & Incremental, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Playing to Wait: A Taxonomy of Idle Games

· Taxonomy evidence: The 2018 primary academic study identifies idle games as a game family and incremental games as a related subset, while recognizing clicker terminology and differences among these labels. It supports a distinct commercial-category vocabulary without treating every subtype as identical. ([researchgate.net](https://www.researchgate.net/profile/Sultan-Alharthi-xx.xx/publication/324658906_Playing_to_Wait_A_Taxonomy_of_Idle_Games/links/61865636d7d1af224bbaeea6/Playing-to-Wait-A-Taxonomy-of-Idle-Games.pdf))

2. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
3. FY26.1Q Supplemental Information
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
4. Microsoft Corporation 2025 Proxy Statement
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
5. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
6. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
7. Nintendo Co., Ltd. Annual Report 2021
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
8. Apple services enrich peoples' lives throughout the year
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

9. Measuring digital development: Facts and Figures 2025 - Internet use
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
10. United Nations World Statistics Pocketbook 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

11. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
12. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
13. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
14. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
15. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

16. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
17. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
18. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

19. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
20. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
21. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
22. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
23. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
24. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.

17.16. Music & Rhythm

Table 224. Global Gaming Market Size, by Music & Rhythm, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 225. Global Gaming Market Size, by Music & Rhythm, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 226. Global Gaming Market Size, by Music & Rhythm, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Google Play Console Help - Choose a Category and Tags for Your App or Game
   · Taxonomy evidence: Music is a recognized game category. ([support.google.com](https://support.google.com/googleplay/android-developer/answer/xx.xx?hl=en))
2. Steam - Popular Tags
   · Taxonomy evidence: Music and Rhythm are documented labels. ([store.steampowered.com](https://store.steampowered.com/tag/browse/))
3. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
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   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.

6. ITU’s Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

7. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.

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· Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

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· Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

12. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
15. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
16. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

17. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
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18. NVIDIA - What are the supported locations for GeForce NOW?
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
19. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

20. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
21. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
22. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
23. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
25. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

17.17. Word & Trivia

Table 227. Global Gaming Market Size, by Word & Trivia, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 228. Global Gaming Market Size, by Word & Trivia, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 229. Global Gaming Market Size, by Word & Trivia, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Google Play Console Help - Choose a Category and Tags for Your App or Game
   · Taxonomy evidence: Word and trivia are separately recognized game categories. ([support.google.com](https://support.google.com/googleplay/android-developer/answer/xx.xx?hl=en))
2. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
3. FY26.1Q Supplemental Information
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
4. Microsoft Corporation 2025 Proxy Statement
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
5. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

6. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
7. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
8. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
9. Measuring digital development: Facts and Figures 2025 - Internet use
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.

10. United Nations World Statistics Pocketbook 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.
11. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
12. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
13. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.

14. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.

22. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
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23. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

18. Gaming Market, by Player Participation

[redacted] A household seeking independent play should verify the actual mode rather than infer multiplayer from community functionality. Those features do not establish a co-player requirement, nor does single-player support alone establish every connectivity or licensing condition.

Multiplayer Only requires a usable participation and entitlement relationship, but not automatically a paid platform membership. [redacted] Group buyers should establish the host entitlement, supported participant devices and remote-session requirements before purchase; a multiplayer label alone does not resolve those conditions.

Single-Player & Multiplayer can serve different household occasions within one offering while retaining mode-specific gates. Capcom's Street Fighter xx.xx listing describes the solo World Tour, online competition and shared-screen play, and requires a Capcom ID for online-only content. [redacted]

Figure 30. Global Gaming Market Size, by Player Participation, 2025 (%)

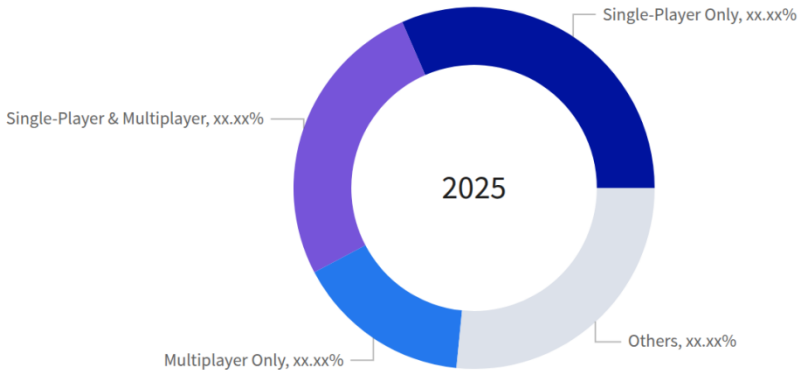

Figure 31. Global Gaming Market, by Player Participation, 2032 (USD Million)

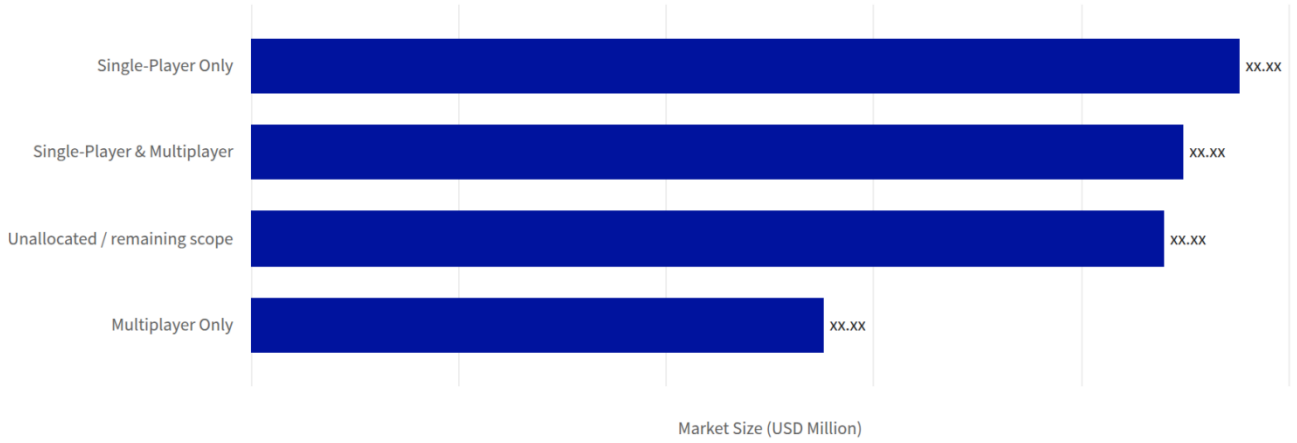

Table 230. Global Gaming Market, by Player Participation growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 231. Global Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. PlayStation Plus - Membership Features and Frequently Asked Questions
   - Most purchased games require PlayStation Plus for online play, while most free-to-play titles do not.

2. Cookie Clicker on Steam
   - The listing specifies single-player support alongside Steam Workshop and cloud features.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
3. Plan Your Next Family Game Night - Jackbox Games
   - Jackbox distinguishes in-person and remote participation and states that a host purchase allows others to join; remote participation requires access to the host's game screen.
4. Street Fighter 6 on Steam
   - Capcom's Street Fighter xx.xx Steam listing describes solo World Tour, online competition and shared-screen support; online-only content requires internet access and a Capcom ID.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
5. OECD - Tax Challenges Arising from Digitalisation: Report on Pillar One Blueprint
   - Taxonomy evidence: The framework distinguishes internet-enabled multiplayer interaction from single-player digital content, independently of the access device. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2020/xx.xx/tax-challenges-arising-from-digitalisation-report-on-pillar-one-blueprint_6034ca99/beba0634-en.pdf))
6. HMRC - DST14700: Application to Online Games
   - Taxonomy evidence: HMRC distinguishes solo play against AI, multiplayer functionality and persistent multiplayer environments, supporting mode-support classification without treating every social feature as core gameplay. ([gov.uk](https://www.gov.uk/hmrc-internal-manuals/digital-services-tax/dst14700))
7. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
8. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
9. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
10. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
    - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

11. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
12. Nintendo Co., Ltd. Annual Report 2021
    - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
    - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
13. Apple services enrich peoples' lives throughout the year
    - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
14. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
15. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.

18.1. Single-Player Only

Table 232. Global Gaming Market Size, by Single-Player Only, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 233. Global Gaming Market Size, by Single-Player Only, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 234. Global Gaming Market Size, by Single-Player Only, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. OECD - Tax Challenges Arising from Digitalisation: Report on Pillar One Blueprint
   · Taxonomy evidence: Single-player games are explicitly recognized separately from multiplayer interaction services. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2020/xx.xx/tax-challenges-arising-from-digitalisation-report-on-pillar-one-blueprint_6034ca99/beba0634-en.pdf))
2. HMRC - DST14700: Application to Online Games
   · Taxonomy evidence: The examples distinguish playing against computer-controlled opponents from playing against other users. ([gov.uk](https://www.gov.uk/hmrc-internal-manuals/digital-services-tax/dst14700))
3. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
4. FY26.1Q Supplemental Information
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5. Microsoft Corporation 2025 Proxy Statement
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.

6. ITU’s Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

7. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.

8. Nintendo Co., Ltd. Annual Report 2021

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

9. Apple services enrich peoples’ lives throughout the year

· Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

10. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
11. United Nations World Statistics Pocketbook 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

12. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
13. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
14. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
15. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
16. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.

17. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
18. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
19. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

20. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
21. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
22. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
23. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
24. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
25. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.

18.2. Single-Player & Multiplayer

Table 235. Global Gaming Market Size, by Single-Player & Multiplayer, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 236. Global Gaming Market Size, by Single-Player & Multiplayer, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 237. Global Gaming Market Size, by Single-Player & Multiplayer, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. HMRC - DST14700: Application to Online Games

   · Taxonomy evidence: The illustrative games include both solo-versus-AI and human multiplayer modes within the same offering, supporting a combined-support category rather than duplicate counting. ([gov.uk](https://www.gov.uk/hmrc-internal-manuals/digital-services-tax/dst14700))

2. Apple celebrates a groundbreaking year in entertainment

   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

3. FY26.1Q Supplemental Information

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.

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   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
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   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
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   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
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   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

9. Measuring digital development: Facts and Figures 2025 - Internet use
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
22. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
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23. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
24. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
25. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
26. Street Fighter 6 on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.

18.3. Multiplayer Only

Table 238. Global Gaming Market Size, by Multiplayer Only, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 239. Global Gaming Market Size, by Multiplayer Only, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 240. Global Gaming Market Size, by Multiplayer Only, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. OECD - Tax Challenges Arising from Digitalisation: Report on Pillar One Blueprint
   · Taxonomy evidence: Multiplayer gaming includes users interacting in the same game environment, including MMO configurations. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2020/xx.xx/tax-challenges-arising-from-digitalisation-report-on-pillar-one-blueprint_6034ca99/beba0634-en.pdf))
2. HMRC - DST14700: Application to Online Games
   · Taxonomy evidence: The discussion identifies multiplayer environments in which other users and their interaction are central to the game experience. ([gov.uk](https://www.gov.uk/hmrc-internal-manuals/digital-services-tax/dst14700))
3. Apple celebrates a groundbreaking year in entertainment
   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
4. FY26.1Q Supplemental Information
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.

5. Microsoft Corporation 2025 Proxy Statement
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
6. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
7. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
8. Nintendo Co., Ltd. Annual Report 2021
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
9. Apple services enrich peoples' lives throughout the year
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

10. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.

19. Gaming Market, by Region

▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ Publishers and bundle distributors should confirm the intended country, title, and account relationship before promising regional access. A common service brand can simplify counterpart selection without establishing identical catalogs or unrestricted portability.

Latin America requires more explicit operator selection. NVIDIA lists Argentina and Brazil under ABYA and identifies both ABYA and Digevo for Chile. ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪

Europe contains a material territorial-rights distinction. The Activision transaction excluded non-EEA cloud streaming rights from Microsoft's acquisition, while Microsoft's corresponding streaming-provider license addresses eligible EEA consumers and games. ▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪

▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ Suppliers can coordinate a broader commercial proposition, but should obtain commitments from the actual serving entities before extending common support or availability promises. Partner-specific availability announcements are a counterforce to assuming that a centrally announced service benefit immediately applies throughout the region.

▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ For a distributor considering a regional cloud bundle, these are different commercial relationships, not evidence that an agreement covers neighboring countries. The practical choice is to define the operator, supported territory, and customer-support responsibility first; a regional marketing presence cannot establish those commitments.

▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ Suppliers should therefore distinguish the local reseller commitment from the underlying platform relationship and verify the countries actually covered. South African participation neither establishes continent-wide

access nor proves that a direct-service arrangement elsewhere has equivalent account or continuity conditions.

Figure 32. Global Gaming Market, by Region: Market share evolution, 2025-2032

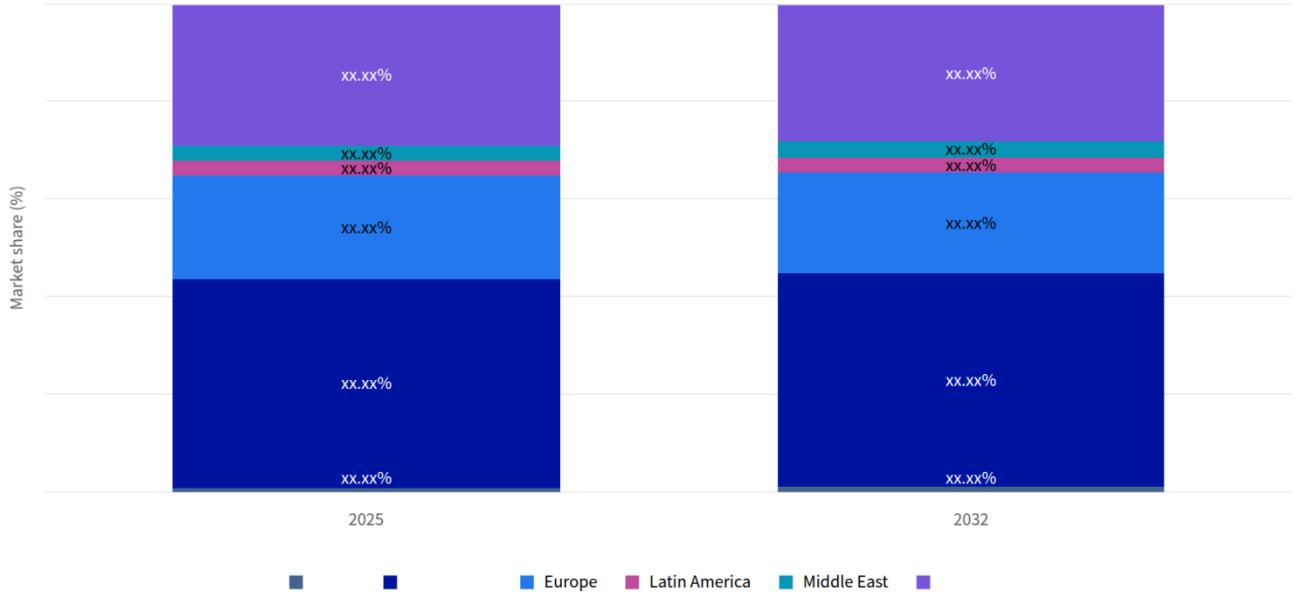

Figure 33. Global Gaming Market, by Region: Market size by category, 2025

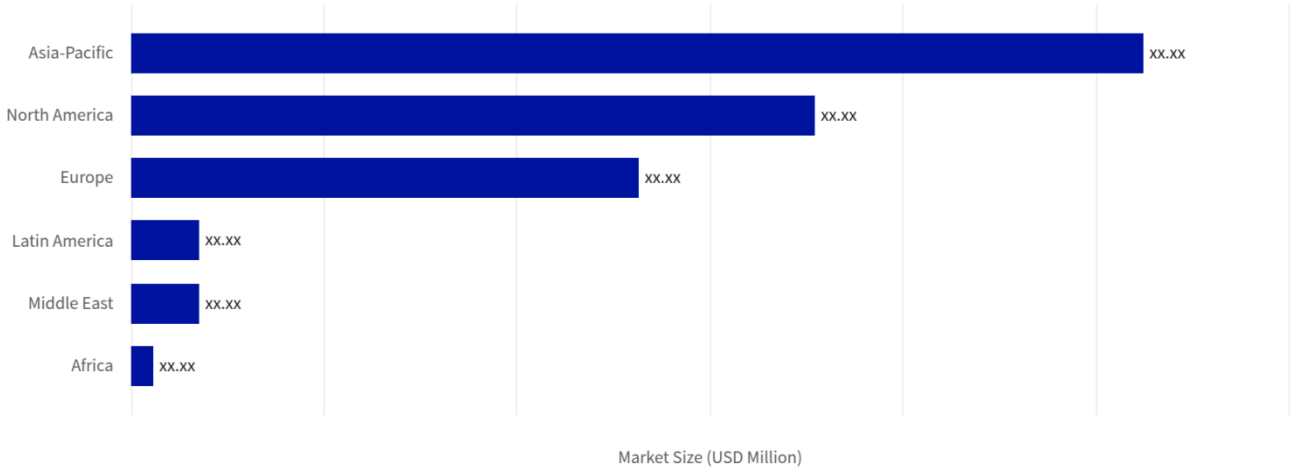

Figure 34. Global Gaming Market, Regional growth by Distribution Channel, 2025-2032 (CAGR %)

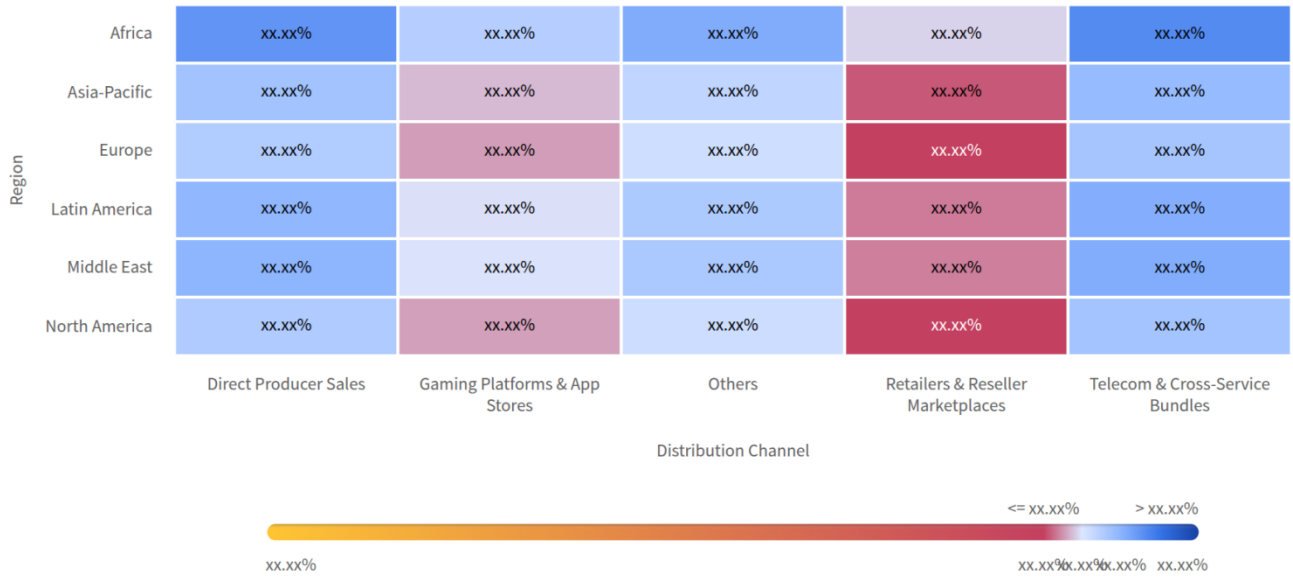

Table 241. Global Gaming Market, by Region growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 242. Global Gaming Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. GeForce NOW FAQs

   · NVIDIA identifies direct GeForce NOW service in North America, Europe, Japan, and India, with Alliance partners elsewhere; supported-store entitlements and local title restrictions remain relevant. ([nvidia.com](https://www.nvidia.com/en-us/geforce-now/faq/))

2. Microsoft / Activision Blizzard (ex-cloud streaming rights) merger inquiry

   · The CMA's October xx.xx 2023 consent excluded Activision Blizzard's non-EEA cloud streaming rights from Microsoft's acquisition. ([gov.uk](https://www.gov.uk/cma-cases/microsoft-slash-activision-blizzard-ex-cloud-streaming-rights-merger-inquiry))

3. What are the supported locations for GeForce NOW?

   · NVIDIA lists ABYA for Argentina and Brazil, both ABYA and Digevo for Chile, a partner for South Korea, GAME+ for Turkey, and rain for South Africa; Israel, Morocco, and Tunisia appear in its direct-service list. ([nvidia.custhelp.com](https://nvidia.custhelp.com/app/answers/detail/a_id/xx.xx/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.

4. Activision Blizzard Cloud Game Streaming in the EEA

   · Microsoft's specified consumer and provider licenses address eligible Activision games and EEA-based consumers, with defined provider conditions. ([xbox.com](https://www.xbox.com/en-US/legal/activision-blizzard-cloud-game-streaming-eu))

5. GAME+ GeForce Now Destek Asistanı & Sık Sorulanlar

   · GAME+ describes a GeForce NOW service using Turkey-specific servers and supported game-store relationships. ([gameplus.com.tr](https://gameplus.com.tr/destek))

6. More information on rain's terms and conditions

   · Rain's terms describe resale of a GeForce NOW subscription incorporating NVIDIA's terms. ([rain.co.za](https://www.rain.co.za/legal))

7. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
8. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
9. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
10. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
    - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
11. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
12. Nintendo Co., Ltd. Annual Report 2021
    - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
    - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
13. Apple services enrich peoples' lives throughout the year
    - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

14. Measuring digital development: Facts and Figures 2025 - Internet use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
15. United Nations World Statistics Pocketbook 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.

16. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
17. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
18. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
19. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.
20. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.
21. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.

19.1. Asia-Pacific

Table 243. Asia-Pacific Gaming Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Taiwan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 244. Asia-Pacific Gaming Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Taiwan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 245. Asia-Pacific Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 246. Asia-Pacific Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 247. Asia-Pacific Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 248. Asia-Pacific Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 249. Asia-Pacific Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 250. Asia-Pacific Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 251. Asia-Pacific Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 252. Asia-Pacific Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 253. Asia-Pacific Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 254. Asia-Pacific Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 255. Asia-Pacific Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 256. Asia-Pacific Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 257. Asia-Pacific Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 258. Asia-Pacific Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 259. Asia-Pacific Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. Measuring digital development: Facts and Figures 2025 - Internet use
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific connectivity and the finite connected audience constrain the purchasing-equivalent model, not its forecast yield assumptions.
9. United Nations World Statistics Pocketbook 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific country profiles bound the modeled gaming-equivalent pools; spending yields remain assumptions.
10. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan and other-destination receipts support Asia-Pacific commercial scale but do not establish the region's total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
11. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
12. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Domestic versus international game receipts constrain regional commercial attribution without defining final-buyer totals or country destinations of international sales.

13. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific including Australia/New Zealand USD xx.xx, xx.xx%, demonstrates portfolio-specific monetization differing from overall regional activity.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
14. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Korean participation counterevidence limits a universal Asia-Pacific adoption-growth thesis; higher PC/console participation among remaining users complicates revenue conversion.
15. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct and Alliance territories constrain availability assumptions without measuring paid conversion.
16. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
17. Australian Classification - New classifications for gambling-like content in video games
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.

18. Sony FY25.3Q Supplemental Information
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
19. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
20. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

21. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
22. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
23. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

24. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
25. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
26. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
27. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
28. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
29. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

30. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
31. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
32. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

33. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
34. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
35. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
36. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.

37. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
38. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
39. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.

40. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
41. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
42. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
43. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
44. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
45. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.

46. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
47. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
48. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
49. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
50. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.

51. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
52. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
53. Street Fighter 6 on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
54. Capcom Q3 FY2025 Financial Results Presentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
55. Steam Keys - Steamworks Documentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.

56. How to Set Parental Controls on PlayStation Consoles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
57. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
58. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
59. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

19.2. North America

Table 260. North America Gaming Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 261. North America Gaming Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 262. North America Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 263. North America Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 264. North America Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 265. North America Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 266. North America Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 267. North America Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 268. North America Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 269. North America Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 270. North America Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 271. North America Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 272. North America Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 273. North America Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 274. North America Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 275. North America Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 276. North America Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
7. Apple services enrich peoples' lives throughout the year
   · Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. Measuring digital development: Facts and Figures 2025 - Internet use
   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 global Internet use and income-group saturation constrain the modeled reachable audience; they are not Gaming shares.
9. United Nations World Statistics Pocketbook 2025
   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country demographic and Internet-use profiles provide population/reach bounds for modeled North American gaming demand.
10. Nintendo Co., Ltd. Annual Report 2026
   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: March-2026 fiscal destination sales disclose Americas JPY xx.xx, including US JPY xx.xx; broader Americas geography requires a bridge.
   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.

11. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The US and Canada belong to the disclosed higher-monetization concentration, supporting heterogeneous regional yields.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
12. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 billing-country revenue US/Canada USD xx.xx, xx.xx% of company revenue, provides an independent portfolio-mix check, not North American Gaming share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
13. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct country listings establish service-footprint context, not uniform catalogs or attributable sales.
14. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

15. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
16. Sony FY25.3Q Supplemental Information
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
17. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
18. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

19. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
20. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
21. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

22. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
23. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
24. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
25. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
26. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
27. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

28. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
29. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
30. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

31. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
32. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
33. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
34. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.

35. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
36. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
37. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.

38. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
39. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
40. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
41. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
42. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
43. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.

44. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
45. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
46. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
47. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
48. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.

49. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
50. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
51. Street Fighter 6 on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
52. Capcom Q3 FY2025 Financial Results Presentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
53. Steam Keys - Steamworks Documentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.

54. How to Set Parental Controls on PlayStation Consoles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
55. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
56. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
57. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

19.3. Europe

Table 277. Europe Gaming Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Switzerland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 278. Europe Gaming Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Switzerland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 279. Europe Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 280. Europe Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 281. Europe Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 282. Europe Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 283. Europe Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 284. Europe Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 285. Europe Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 286. Europe Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 287. Europe Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 288. Europe Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 289. Europe Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 290. Europe Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 291. Europe Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 292. Europe Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 293. Europe Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. Measuring digital development: Facts and Figures 2025 - Internet use
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: High European connectivity constrains audience-growth headroom, not observed purchasing growth.
9. United Nations World Statistics Pocketbook 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: European country profiles bound modeled reachable audiences without converting GDP or population directly into shares.
10. Eurostat - Culture statistics: use of ICT for cultural purposes
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rendered Table xx.xx reports 2024 quarterly online purchasing of game downloads at xx.xx% and gaming-streaming subscriptions at xx.xx% among Internet users. This constrains payer conversion, not annual all-offering spend; conflicting extracted 2025 text is not used as an observation.
11. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe JPY xx.xx is a supplier destination-mix calibration, not European final-buyer expenditure.

12. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe participates in the disclosed xx.xx% combined US/Canada/Europe/Australia revenue concentration, not a separately measured European share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
13. Roblox Corporation Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe USD xx.xx, xx.xx%, supports a separately disclosed destination-commercialization anchor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
14. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country listings support access-premise assessment, not a rights-cleared Europe-wide revenue uplift.
15. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.

16. Sony FY25.3Q Supplemental Information
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
17. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
18. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

19. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
20. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
21. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

22. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
23. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
24. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
25. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
26. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
27. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

28. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
29. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
30. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

31. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
32. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
33. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
34. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.

35. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
36. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
37. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.

38. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
39. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
40. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
41. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
42. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
43. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.

44. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
45. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
46. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
47. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
48. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.

49. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
50. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
51. Street Fighter 6 on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
52. Capcom Q3 FY2025 Financial Results Presentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
53. Steam Keys - Steamworks Documentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.

54. How to Set Parental Controls on PlayStation Consoles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
55. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
56. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
57. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

19.4. Latin America

Table 294. Latin America Gaming Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Argentina	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chile	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Colombia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Peru	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 295. Latin America Gaming Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Argentina	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chile	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Colombia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Peru	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 296. Latin America Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 297. Latin America Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 298. Latin America Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 299. Latin America Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 300. Latin America Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 301. Latin America Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 302. Latin America Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 303. Latin America Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 304. Latin America Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 305. Latin America Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 306. Latin America Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 307. Latin America Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 308. Latin America Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 309. Latin America Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 310. Latin America Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. Measuring digital development: Facts and Figures 2025 - Internet use
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Americas connectivity informs audience bounds, with the catalog's North America/Latin America distinction retained.
9. United Nations World Statistics Pocketbook 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country population and connectivity context constrain Latin American audience pools; no Gaming revenues are reported.
10. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ABYA and Digevo listings establish heterogeneous operator routes; no common regional subscription coefficient is inferred.
11. Brazil - Lei nº 14.852, de 3 de maio de 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
12. Sony FY25.3Q Supplemental Information
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.

13. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
14. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

15. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
16. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
17. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

18. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
19. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
20. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
21. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
22. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
23. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

24. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
25. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
26. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

27. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
28. Playtika Holding Corp. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
29. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.

30. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
31. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
32. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
33. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.

34. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
35. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
36. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
37. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.

38. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
39. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
40. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
41. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
42. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
43. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.

44. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
45. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
46. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
47. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
48. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.

49. Street Fighter 6 on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
50. Capcom Q3 FY2025 Financial Results Presentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
51. Steam Keys - Steamworks Documentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
52. How to Set Parental Controls on PlayStation Consoles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
53. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.

54. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
55. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

19.5. Middle East

Table 311. Middle East Gaming Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Israel	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 312. Middle East Gaming Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Israel	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 313. Middle East Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 314. Middle East Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 315. Middle East Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 316. Middle East Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 317. Middle East Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 318. Middle East Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 319. Middle East Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 320. Middle East Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 321. Middle East Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 322. Middle East Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 323. Middle East Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 324. Middle East Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 325. Middle East Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 326. Middle East Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 327. Middle East Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. Measuring digital development: Facts and Figures 2025 - Internet use
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Arab States connectivity is a reach input requiring a country-level bridge to the captured Middle East.
9. United Nations World Statistics Pocketbook 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle Eastern country profiles constrain population/reach assumptions rather than investment-to-demand conversion.
10. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Israel direct and Turkey partner listings prevent assuming one regional commercial relationship.
11. UAE National Media Authority - Digital Electronic Video Games Circulation Permit
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The digital-game circulation service requires a media-license and intellectual-property documentation bridge; authorization conditions establish neither zero demand nor an observed purchasing uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The digital-game circulation service requires a media-license and intellectual-property documentation bridge; authorization conditions establish neither zero demand nor an observed purchasing uplift.
12. Sony FY25.3Q Supplemental Information
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.

13. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
14. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

15. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
16. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
17. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

18. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
19. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
20. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
21. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
22. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
23. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

24. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
25. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
26. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

27. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
28. Playtika Holding Corp. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
29. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.

30. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
31. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
32. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
33. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.

34. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
35. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
36. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
37. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.

38. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
39. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
40. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
41. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
42. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
43. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.

44. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
45. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
46. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
47. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
48. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.

49. Street Fighter 6 on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
50. Capcom Q3 FY2025 Financial Results Presentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
51. Steam Keys - Steamworks Documentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
52. How to Set Parental Controls on PlayStation Consoles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
53. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.

54. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
55. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

19.6. Africa

Table 328. Africa Gaming Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Egypt	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kenya	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nigeria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 329. Africa Gaming Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Egypt	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kenya	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nigeria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 330. Africa Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 331. Africa Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 332. Africa Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 333. Africa Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 334. Africa Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 335. Africa Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 336. Africa Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 337. Africa Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 338. Africa Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 339. Africa Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 340. Africa Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 341. Africa Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 342. Africa Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 343. Africa Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 344. Africa Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. Measuring digital development: Facts and Figures 2025 - Internet use
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Connectivity disparities constrain lower-yield audience expansion; the ITU Africa grouping is not copied as the catalog's region.
9. United Nations World Statistics Pocketbook 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: African demographic/connectivity profiles provide heterogeneous reach context for country-specific working estimates.
10. NVIDIA - What are the supported locations for GeForce NOW?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: South African partner and northern direct listings establish heterogeneous routes, not continent-wide purchasing.
11. Sony FY25.3Q Supplemental Information
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
12. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.

13. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

14. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
15. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
16. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

17. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
18. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
19. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
20. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
21. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
22. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

23. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
24. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
25. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

26. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
27. Playtika Holding Corp. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
28. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.

29. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
30. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
31. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
32. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.

33. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
34. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
35. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
36. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.

37. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
38. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
39. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
40. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
41. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
42. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.

43. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
44. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
45. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
46. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
47. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.

48. Street Fighter 6 on Steam
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.

49. Capcom Q3 FY2025 Financial Results Presentation
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.

50. Steam Keys - Steamworks Documentation
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.

51. How to Set Parental Controls on PlayStation Consoles
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.

52. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.

53. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
54. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

20. Gaming Market, by Group

[redacted] Publishers can organize a common platform relationship while retaining country-specific packaging and ratings checks. Administrative coordination is useful only when it preserves those distinctions; a label accepted for one constituent is not sufficient evidence for every release format across the group.

Europe, Middle East & Africa combines commercial responsibilities that attach to different legal roles. EU electrical-equipment guidance requires relevant registration in each country where equipment is sold, whereas the United Arab Emirates separately requires a media-licensed applicant for digital-game circulation. [redacted]

[redacted] Standardized contracting may reduce duplication; separate country arrangements remain preferable where the proposed transfer does not meet applicable requirements. The clauses are not a game-publishing authorization.

GCC creates a potentially useful physical-distribution structure through its customs union and first-entry clearance framework. However, the official framework preserves restrictions on goods prohibited in particular destinations or transit countries. [redacted]

Australasia has a documented shared cloud-service route: NVIDIA identifies CloudGG as the Alliance partner serving Australia and New Zealand. [redacted] A supplier can coordinate operator discussions while retaining country-specific title checks; the shared service footprint does not establish equivalent classification outcomes or suitability for the same younger audience.

Nordic illustrates why EEA and EU coverage must be distinguished. Norway and Iceland participate in the EEA outside the EU. [redacted]

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European Union provides a common framework for additional mobile distribution routes, but not an unconditional launch right. ■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■ ■■■■■■■■■
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■■■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■ Remaining within the App Store preserves a different integrated relationship; changing channels does not itself establish better economics or regulatory compliance.

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G7 supplies a useful comparison of changing platform leverage. The OECD's 2024 comparison identifies restrictions on steering as a common competition concern addressed through both enforcement and standing digital-market rules. ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■
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NATO is an unsuitable proxy for a common gaming-service entitlement. NVIDIA describes direct North American service, whereas Turkey's GAME+ documents a separate service relationship and eligible Turkcell carrier billing. ■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■
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■■■■■■■■■■■■ An EU constituent can also appear within Nordic, G7, NATO, or Europe, Middle East & Africa comparisons. Commercial planning should apply each relevant mechanism to the underlying country and offering without treating repeated coverage as a separate opportunity.

Figure 35. Global Gaming Market Size, by Group, 2025 vs 2026 vs 2032

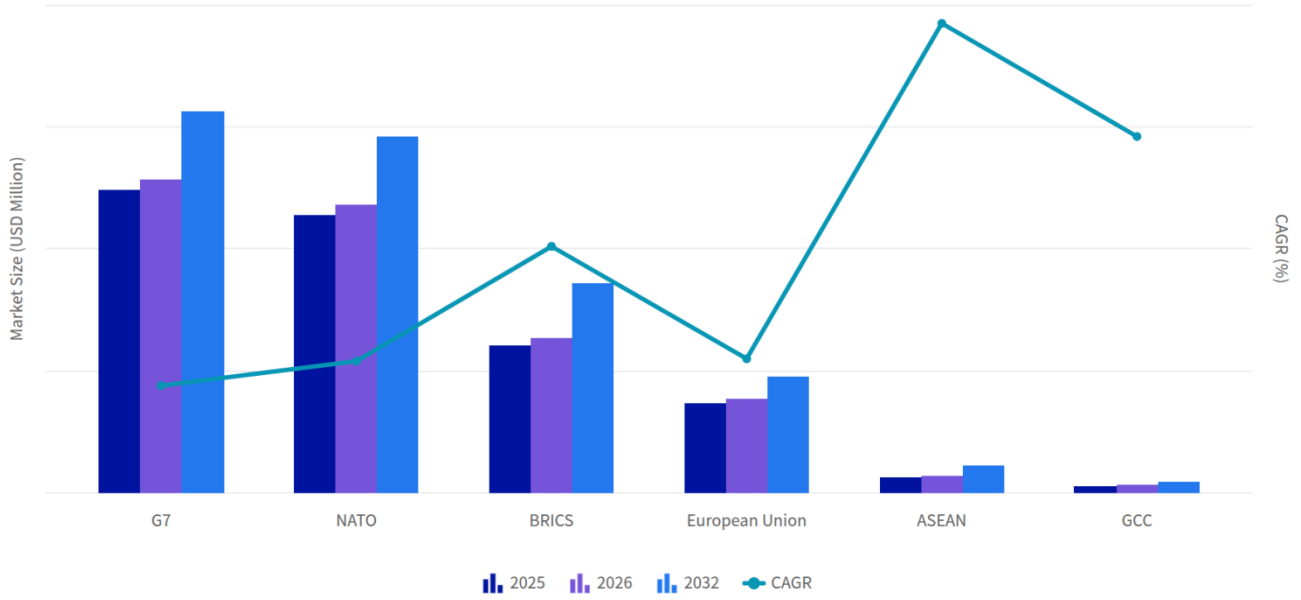

Table 345. Global Gaming Market Size, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Sources & Evidence

1. GeForce NOW FAQs

   · Direct North American service supports comparison with the separate GAME+ relationship; a common NATO entitlement is not established. ([nvidia.com](https://www.nvidia.com/en-us/geforce-now/faq/))

2. Changes for Apps in the European Union - Apple Developer

   · Apple's EU arrangements describe alternative marketplace and website distribution, retained notarization, and commercial conditions under terms effective October xx.xx 2026; their stated perimeter is the EU. ([developer.apple.com](https://developer.apple.com/support/apps-in-the-eu/))

3. WEEE Responsibilities - Your Europe

   · EU guidance identifies country-level registration and equipment collection or recovery responsibilities for relevant electrical-equipment businesses, including individual and collective fulfillment routes. ([europa.eu](https://europa.eu/youreurope/business/product-rules-compliance/recycling-waste-management/weee-responsibilities/index_en.htm))

4. Activision Blizzard Cloud Game Streaming in the EEA

   · The license's EEA consumer perimeter supports distinguishing Nordic streaming-rights coverage from an EU-only platform arrangement. ([xbox.com](https://www.xbox.com/en-US/legal/activision-blizzard-cloud-game-streaming-eu))

5. GAME+ GeForce Now Destek Asistanı & Sık Sorulanlar

   · GAME+ documents eligible Turkcell carrier billing and its own customer-support relationship, supporting operator-specific bundle assessment. ([gameplus.com.tr](https://gameplus.com.tr/destek))

6. More information on rain's terms and conditions

   · The documented South African resale relationship illustrates a country-level commercial gateway rather than a BRICS-wide permission. ([rain.co.za](https://www.rain.co.za/legal))

7. Age ratings guidance for countries/regions - Game Publishing Guide

   · Microsoft's publishing guidance distinguishes ESRB treatment for the United States and Canada, Mexico's physical SMECCV equivalency mapping, and Brazil's DJCTQ classification. ([learn.microsoft.com](https://learn.microsoft.com/en-us/gaming/game-publishing/concepts/age-ratings-guidance))

8. Digital Electronic Video Games Circulation Permit

   · The UAE digital-game permit requires a valid media license, supporting separation of content authorization from equipment obligations and GCC customs treatment. ([nma.gov.ae](https://www.nma.gov.ae/en/services/digital-electronic-video-games-circulation-permit))

9. Joint Guide to ASEAN Model Contractual Clauses and EU Standard Contractual Clauses

   · The joint guide describes ASEAN Model Contractual Clauses and EU Standard Contractual Clauses as voluntary cross-border transfer tools addressing applicable legal requirements, not game-publishing authorization. ([commission.europa.eu](https://commission.europa.eu/system/files/2023-xx.xx/%28Final%xx.xx%20Joint_Guide_to_ASEAN_MCC_and_EU_SCC.pdf))

10. Customs Union for GCC States

    · The GCC customs framework describes first-entry inspection and clearance while preserving restrictions for goods prohibited in particular states, including transit constraints. ([icp.gov.ae](https://icp.gov.ae/en/customs-union-for-gcc/))

11. GeForce NOW Powered by CloudGG

    · NVIDIA identifies its local Alliance partner CloudGG as the GeForce NOW provider in Australia and New Zealand. ([nvidia.com](https://www.nvidia.com/en-au/geforce-now/))

12. Video games - Classification Office

    · New Zealand's Classification Office states that restricted games cannot be supplied to underage people and distinguishes local classification treatment across distribution settings. ([classificationoffice.govt.nz](https://www.classificationoffice.govt.nz/classification-info/what-we-classify/video-games/))

13. The EEA EFTA States

    · EFTA identifies Iceland and Norway among the non-EU EEA contracting states, supporting the Nordic distinction between EEA and EU coverage. ([efta.int](https://www.efta.int/eea-relations-eu/eea-institutions-two-pillar-structure/eea-efta-states))

14. BRICS Brasil 2025 - Trade Ministers' Meeting Package of Outcomes

    · The BRICS trade-ministerial outcomes preserve sovereign data governance and make cross-border transmission and interoperability subject to national regulatory frameworks. ([gov.br](https://www.gov.br/mdic/pt-br/centrais-de-conteudo/publicacoes/brics/comercio/ingles/brics_tmm_package_of_outcomes_v21-xx.xx-25_final-version.pdf))

15. Competition Policy in Digital Markets: The Combined Effect of Ex Ante and Ex Post Instruments in G7 Jurisdictions

    · The OECD's 2024 G7 comparison discusses anti-steering restrictions and the combined use of enforcement and standing digital-market instruments across jurisdictions. ([jftc.go.jp](https://www.jftc.go.jp/file/241007G7_result2.pdf))

16. スマホソフトウェア競争促進法（スマホ法） - Japan Fair Trade Commission

    · Japan's Fair Trade Commission states that the smartphone software competition law became fully effective on December xx.xx 2025. ([jftc.go.jp](https://www.jftc.go.jp/msca/index.html))

17. Lei nº 14.852, de 3 de maio de 2024

    · Brazil's national electronic-games framework supplies a country-level commercialization rule rather than a BRICS-wide permission. ([presidencia.gov.br](https://www.presidencia.gov.br/ccivil_03/_ato2023-2026/2024/lei/l14852.htm))

18. New classifications for gambling-like content in video games

    · Australia's gambling-like-content classifications establish a national distinction that remains relevant despite Australasia's shared cloud operator. ([classification.gov.au](https://www.classification.gov.au/about-us/media-and-news/news/new-classifications-for-gambling-content-video-games))

19. Apple celebrates a groundbreaking year in entertainment

    · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

20. FY26.1Q Supplemental Information

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.

21. Microsoft Corporation 2025 Proxy Statement

    · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.

22. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability

    · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

23. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.

24. Nintendo Co., Ltd. Annual Report 2021

    · Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.

    · Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

25. Apple services enrich peoples' lives throughout the year

    · Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.

20.1. G7

Table 346. G7 Gaming Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 347. G7 Gaming Market Size, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 348. G7 Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 349. G7 Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 350. G7 Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 351. G7 Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 352. G7 Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 353. G7 Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 354. G7 Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 355. G7 Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 356. G7 Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 357. G7 Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 358. G7 Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 359. G7 Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 360. G7 Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 361. G7 Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 362. G7 Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. Nintendo Co., Ltd. Annual Report 2026
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
9. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
10. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.

11. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
12. Apple Developer - Changes to iOS in Japan
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
13. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
14. Sony FY25.3Q Supplemental Information
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
15. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
16. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

17. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
18. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
19. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

20. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
21. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
22. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
23. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
24. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
25. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

26. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
27. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
28. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

29. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
30. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
31. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
32. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.

33. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
34. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
35. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.

36. 2025 Essential Facts About the U.S. Video Game Industry

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.

37. GDC 2025: The Past, Present and Future of Developing VR and MR

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.

38. GDC 2026: State of VR

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.

39. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.

40. Scopely to Acquire Niantic's Games Business

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.

41. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
42. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
43. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
44. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
45. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
46. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.

47. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
48. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
49. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
50. Street Fighter 6 on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
51. Capcom Q3 FY2025 Financial Results Presentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
52. Steam Keys - Steamworks Documentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.

53. How to Set Parental Controls on PlayStation Consoles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
54. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
55. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
56. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

20.2. NATO

Table 363. NATO Gaming Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Albania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iceland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Montenegro	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North Macedonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 363 - continued

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 364. NATO Gaming Market Size, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Albania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iceland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Montenegro	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North Macedonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 364 - continued

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 365. NATO Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 366. NATO Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 367. NATO Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 367 - continued

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 368. NATO Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 369. NATO Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 370. NATO Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 371. NATO Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 372. NATO Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 373. NATO Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 374. NATO Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 375. NATO Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 376. NATO Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 377. NATO Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 378. NATO Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 379. NATO Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. Nintendo Co., Ltd. Annual Report 2026
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
9. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
10. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.
11. Steamworks - Age Ratings Mandatory in Germany
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
12. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

13. Sony FY25.3Q Supplemental Information
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
14. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
15. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

16. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
17. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
18. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

19. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
20. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
21. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
22. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
23. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
24. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

25. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
26. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
27. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

28. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
29. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
30. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
31. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.

32. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
33. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
34. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.

35. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
36. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
37. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
38. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
39. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.

40. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
41. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
42. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
43. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
44. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
45. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.

46. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
47. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
48. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
49. Street Fighter 6 on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
50. Capcom Q3 FY2025 Financial Results Presentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
51. Steam Keys - Steamworks Documentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.

52. How to Set Parental Controls on PlayStation Consoles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
53. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
54. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
55. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

20.3. BRICS

Table 380. BRICS Gaming Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 381. BRICS Gaming Market Size, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 382. BRICS Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 383. BRICS Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 384. BRICS Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 385. BRICS Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 386. BRICS Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 387. BRICS Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 388. BRICS Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 389. BRICS Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 390. BRICS Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 391. BRICS Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 392. BRICS Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 393. BRICS Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 394. BRICS Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 395. BRICS Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 396. BRICS Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. Tencent Announces 2025 Annual and Fourth Quarter Results
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
9. Brazil - Lei nº 14.852, de 3 de maio de 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
10. Sony FY25.3Q Supplemental Information
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
11. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.

12. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

13. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
14. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
15. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

16. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
17. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
18. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
19. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
20. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
21. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

22. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
23. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
24. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

25. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
26. Playtika Holding Corp. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
27. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.

28. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
29. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
30. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
31. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.

32. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
33. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
34. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
35. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.

36. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
37. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
38. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
39. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
40. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
41. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.

42. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
43. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
44. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
45. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
46. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.

47. Street Fighter 6 on Steam
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.

48. Capcom Q3 FY2025 Financial Results Presentation
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.

49. Steam Keys - Steamworks Documentation
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.

50. How to Set Parental Controls on PlayStation Consoles
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.

51. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.

52. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
53. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

20.4. European Union

Table 397. European Union Gaming Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cyprus	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ireland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malta	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 398. European Union Gaming Market Size, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cyprus	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ireland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malta	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 399. European Union Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 400. European Union Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 401. European Union Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 402. European Union Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 403. European Union Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 404. European Union Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 405. European Union Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 406. European Union Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 407. European Union Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 408. European Union Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 409. European Union Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 410. European Union Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 411. European Union Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 412. European Union Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 413. European Union Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. Steamworks - Age Ratings Mandatory in Germany
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
9. Sony FY25.3Q Supplemental Information
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
10. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
11. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

12. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
13. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
14. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

15. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
16. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
17. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
18. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
19. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
20. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

21. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
22. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
23. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

24. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
25. Playtika Holding Corp. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
26. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.

27. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
28. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
29. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
30. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.

31. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
32. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
33. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
34. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.

35. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
36. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
37. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
38. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
39. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
40. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.

41. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
42. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
43. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
44. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
45. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.

46. Street Fighter 6 on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
47. Capcom Q3 FY2025 Financial Results Presentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
48. Steam Keys - Steamworks Documentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
49. How to Set Parental Controls on PlayStation Consoles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
50. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.

51. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
52. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

20.5. ASEAN

Table 414. ASEAN Gaming Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Brunei	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cambodia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lao People's Democratic Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Myanmar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vietnam	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 415. ASEAN Gaming Market Size, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Brunei	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cambodia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lao People's Democratic Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Myanmar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vietnam	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 416. ASEAN Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 417. ASEAN Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 418. ASEAN Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 419. ASEAN Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 420. ASEAN Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 421. ASEAN Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 422. ASEAN Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 423. ASEAN Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 424. ASEAN Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 425. ASEAN Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 426. ASEAN Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 427. ASEAN Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 428. ASEAN Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 429. ASEAN Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 430. ASEAN Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. Sony FY25.3Q Supplemental Information
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
9. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.

10. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

11. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
12. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
13. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

14. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
15. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
16. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
17. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
18. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
19. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

20. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
21. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
22. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

23. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
24. Playtika Holding Corp. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
25. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.

26. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
27. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
28. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
29. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.

30. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
31. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
32. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
33. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.

34. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
35. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
36. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
37. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
38. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
39. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.

40. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
41. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
42. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
43. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
44. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.

45. Street Fighter 6 on Steam
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
46. Capcom Q3 FY2025 Financial Results Presentation
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
47. Steam Keys - Steamworks Documentation
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
48. How to Set Parental Controls on PlayStation Consoles
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
49. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.

50. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
51. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

20.6. GCC

Table 431. GCC Gaming Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Bahrain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kuwait	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oman	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 432. GCC Gaming Market Size, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bahrain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kuwait	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oman	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 433. GCC Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 434. GCC Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 435. GCC Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 436. GCC Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 437. GCC Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 438. GCC Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 439. GCC Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 440. GCC Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 441. GCC Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 442. GCC Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 443. GCC Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 444. GCC Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 445. GCC Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 446. GCC Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 447. GCC Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. UAE National Media Authority - Digital Electronic Video Games Circulation Permit
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The digital-game circulation service requires a media-license and intellectual-property documentation bridge; authorization conditions establish neither zero demand nor an observed purchasing uplift.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The digital-game circulation service requires a media-license and intellectual-property documentation bridge; authorization conditions establish neither zero demand nor an observed purchasing uplift.
9. Sony FY25.3Q Supplemental Information
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
10. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.

11. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

12. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
13. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
14. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

15. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
16. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
17. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
18. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
19. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
20. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

21. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
22. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
23. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

24. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
25. Playtika Holding Corp. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
26. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.

27. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
28. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
29. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
30. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.

31. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
32. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
33. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
34. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.

35. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
36. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
37. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
38. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
39. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
40. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.

41. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
42. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
43. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
44. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
45. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.

46. Street Fighter 6 on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
47. Capcom Q3 FY2025 Financial Results Presentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
48. Steam Keys - Steamworks Documentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
49. How to Set Parental Controls on PlayStation Consoles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
50. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.

51. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
52. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

21. Gaming Market, by Country

[illegible] Operators and advertising buyers should establish responsibility for the actual disclosure before treating an audience as eligible inventory. Integral disclosures and applicable exceptions receive different treatment; this is not a blanket prohibition covering every game, minor, or advertising relationship.

Germany provides a concrete catalog-access gate. [illegible] A USK rating must also correspond to the version actually distributed.

[illegible] Mobile-game suppliers should confirm the intended marketplace's status and their own contractual obligations before committing launch support. The announced route establishes platform options, not availability or customer acceptance of a particular game through them.

Brazil's Law xx.xx of May xx.xx 2024 dispenses with prior state authorization for development and commercial exploitation of covered electronic games, subject to existing legislation and age classification. A supplier should establish whether its actual offering falls within that statutory regime before relying on the provision. [illegible]

United Arab Emirates digital distribution has an explicit circulation-permit relationship. The National Media Authority's service covers digital video games circulated through online retail stores and requires a valid media license for distributing and importing electronic video games, alongside an intellectual-property certificate. [illegible]

Australia's classification changes effective September xx.xx 2024 distinguish paid chance-based purchases from simulated gambling. The former attract at least an M classification, while simulated gambling attracts R18+. [illegible]

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South Africa's rain offering separates the subscriber from the player audience. Its GeForce NOW terms require an adult customer and allow non-rain customers to participate after creating a rain account; NVIDIA's terms also apply. ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■ ■ ■■■■■■ ■■■ ■■■■■■■ ■■■■ ■■ ■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■ ■■ ■ ■■■■■■■■■ ■■■■ ■■■ ■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■

Figure 36. Global Gaming Market Size, by Country, 2025 vs 2032 (%)

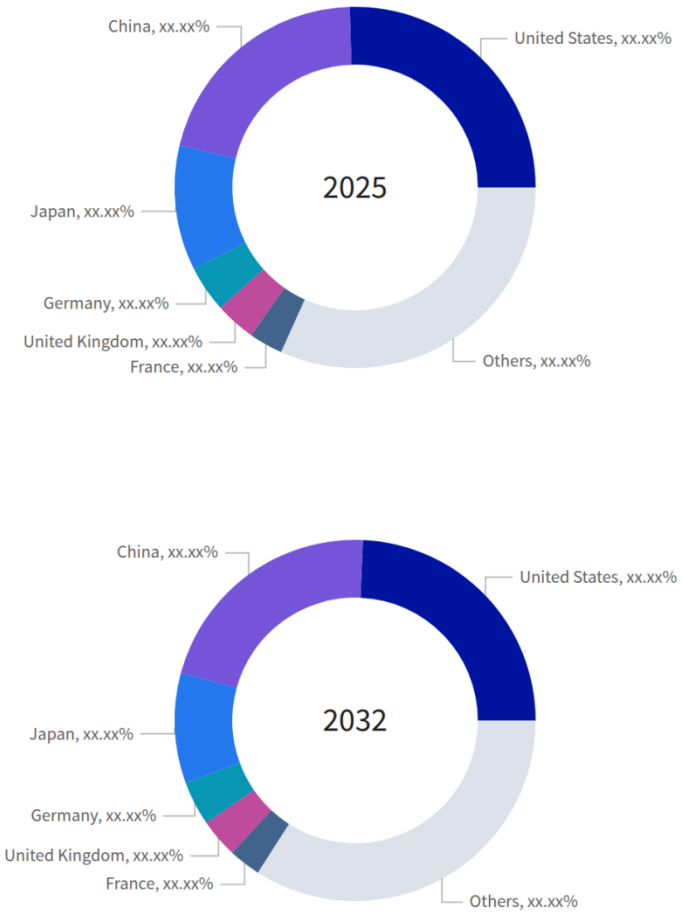

Figure 37. Global Gaming Market Size, by Country, 2025 vs 2026 vs 2032

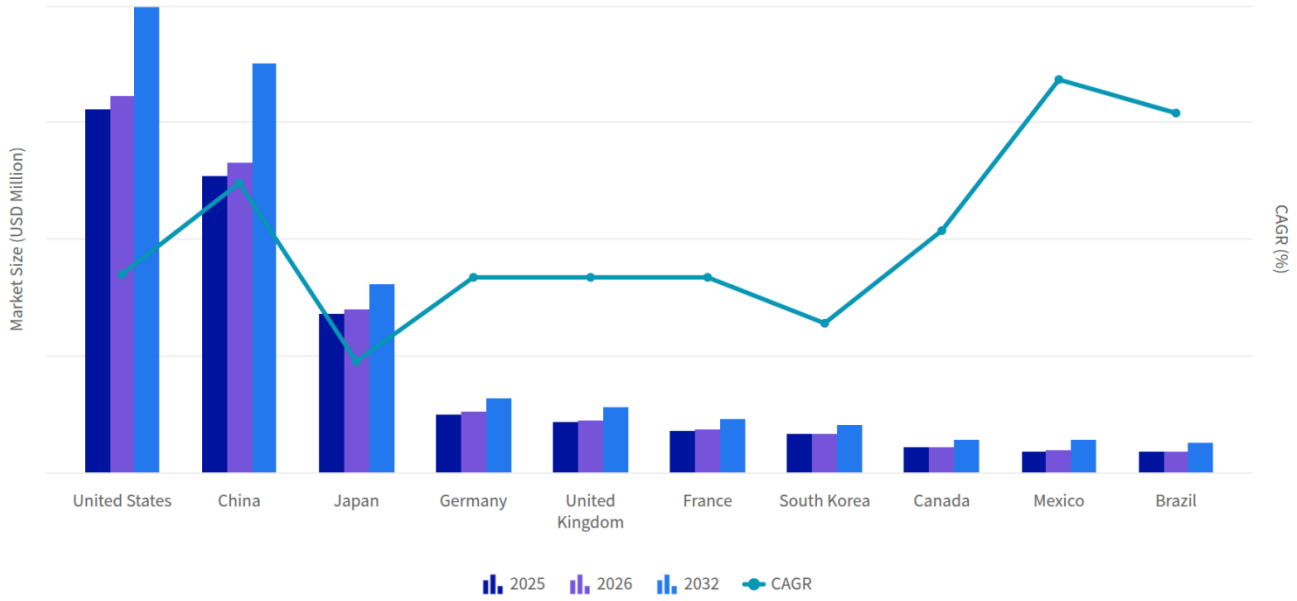

Table 448. Global Gaming Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 449. Global Gaming Market Size, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
   - The amended COPPA rule sets April xx.xx 2026 as the general compliance deadline and requires separate parental consent for covered nonintegral third-party disclosures. ([govinfo.gov](https://www.govinfo.gov/content/pkg/FR-2025-xx.xx-xx.xx/html/2025-xx.xx.htm))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.
2. More information on rain's terms and conditions
   - Rain requires GeForce NOW customers to be at least xx.xx and permits non-rain customers after account creation; NVIDIA's terms also apply. ([rain.co.za](https://www.rain.co.za/legal))
3. Digital Electronic Video Games Circulation Permit
   - The service authorizes digital-game circulation through online retail stores and requires an intellectual-property certificate and a valid distribution/import media license. ([nma.gov.ae](https://www.nma.gov.ae/en/services/digital-electronic-video-games-circulation-permit))
4. スマホソフトウェア競争促進法（スマホ法） - Japan Fair Trade Commission
   - The full-commencement date establishes the national legal context for the documented Japanese platform changes. ([jftc.go.jp](https://www.jftc.go.jp/msca/index.html))

5. Changes to iOS in Japan

   · Apple's December xx.xx 2025 announcement describes alternative marketplaces and payment options in Japan beginning with iOS xx.xx, while retaining notarization and marketplace authorization. ([developer.apple.com](https://developer.apple.com/news/?id=074b3wzz))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.

6. Age Ratings Mandatory in Germany - Steamworks Documentation

   · Steam states that unrated games are hidden in Germany from November xx.xx 2024; its rating route does not guarantee eligibility, and entered USK ratings must match the distributed version. ([partner.steamgames.com](https://partner.steamgames.com/doc/gettingstarted/contentsurvey/germany?l=english))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.

7. Lei nº 14.852, de 3 de maio de 2024

   · Law xx.xx of May xx.xx 2024 dispenses with prior state authorization for covered development and commercial exploitation, preserves existing-law and classification requirements, and contains wagering exclusions. ([presidencia.gov.br](https://www.presidencia.gov.br/ccivil_03/_ato2023-2026/2024/lei/l14852.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.

8. New classifications for gambling-like content in video games

   · Changes effective September xx.xx 2024 establish at least M for paid chance-based purchases and R18+ for simulated gambling; M is advisory and R18+ is adult-restricted. ([classification.gov.au](https://www.classification.gov.au/about-us/media-and-news/news/new-classifications-for-gambling-content-video-games))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.

9. Apple celebrates a groundbreaking year in entertainment

   · Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.

10. FY26.1Q Supplemental Information

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.

11. Microsoft Corporation 2025 Proxy Statement

    · Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.

12. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
    - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
13. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
14. Nintendo Co., Ltd. Annual Report 2021
    - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
    - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
15. Apple services enrich peoples' lives throughout the year
    - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
16. Nintendo Co., Ltd. Annual Report 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
17. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
18. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
19. KOCCA - 2025 Game User Survey press release
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
20. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.

21.1. United States

Table 450. United States Gaming Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
United States	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 451. United States Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 452. United States Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 453. United States Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 454. United States Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 455. United States Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 456. United States Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 457. United States Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 458. United States Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 459. United States Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 460. United States Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 461. United States Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 462. United States Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 463. United States Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 464. United States Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 465. United States Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. Nintendo Co., Ltd. Annual Report 2026
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: US destination sales imply xx.xx% of Nintendo's broader Americas sales; this is not the US share of North American Gaming.
9. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 user-location revenue is xx.xx% US, supporting commercially material US monetization without representing a whole-market share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
10. Children's Online Privacy Protection Rule - Final Rule, April 22, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The amended COPPA rule's April xx.xx 2026 general compliance date and covered consent obligations constrain advertising assumptions; no measured blanket US spending reduction is established.
11. U.S. Bureau of Economic Analysis - Consumer Spending by State
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: State PCE follows resident purchases rather than supplier location, supporting the US destination-attribution premise. Its broad categories do not establish optional state Gaming numerators.
12. Sony FY25.3Q Supplemental Information
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.

13. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
14. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

15. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
16. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
17. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

18. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
19. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
20. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
21. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
22. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
23. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

24. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
25. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
26. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

27. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
28. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
29. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
30. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.

31. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
32. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
33. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.

34. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
35. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
36. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
37. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
38. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.

39. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
40. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
41. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
42. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
43. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
44. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.

45. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
46. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
47. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
48. Street Fighter 6 on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
49. Capcom Q3 FY2025 Financial Results Presentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
50. Steam Keys - Steamworks Documentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.

51. How to Set Parental Controls on PlayStation Consoles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
52. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
53. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
54. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

21.2. China

Table 466. China Gaming Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
China	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 467. China Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 468. China Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 469. China Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 470. China Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 471. China Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 472. China Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 473. China Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 474. China Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 475. China Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 476. China Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 477. China Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 478. China Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 479. China Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 480. China Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 481. China Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. Tencent Announces 2025 Annual and Fourth Quarter Results
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 domestic-game revenue RMB xx.xx provides a recognized-revenue anchor for Chinese purchasing; international-game revenue RMB xx.xx is not assigned to China by headquarters.
9. Sony FY25.3Q Supplemental Information
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
10. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
11. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

12. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
13. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
14. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

15. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
16. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
17. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
18. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
19. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
20. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

21. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
22. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
23. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

24. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
25. Playtika Holding Corp. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
26. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.

27. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
28. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
29. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
30. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.

31. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
32. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
33. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
34. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.

35. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
36. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
37. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
38. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
39. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
40. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.

41. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
42. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
43. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
44. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
45. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.

46. Street Fighter 6 on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
47. Capcom Q3 FY2025 Financial Results Presentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
48. Steam Keys - Steamworks Documentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
49. How to Set Parental Controls on PlayStation Consoles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
50. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.

51. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
52. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

21.3. Japan

Table 482. Japan Gaming Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Japan	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 483. Japan Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 484. Japan Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 485. Japan Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 486. Japan Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 487. Japan Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 488. Japan Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 489. Japan Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 490. Japan Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 491. Japan Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 492. Japan Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 493. Japan Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 494. Japan Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 495. Japan Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 496. Japan Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 497. Japan Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. Nintendo Co., Ltd. Annual Report 2026
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan JPY xx.xx provides a destination hardware/content anchor, with fiscal timing, retail and excluded-IP bridges.
9. Apple Developer - Changes to iOS in Japan
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 announcement establishes alternative Japanese iOS routes with retained platform conditions; incremental purchasing and net-fee benefits are unmeasured.
10. Sony FY25.3Q Supplemental Information
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
11. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.

12. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

13. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
14. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
15. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

16. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
17. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
18. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
19. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
20. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
21. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

22. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
23. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
24. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

25. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
26. Playtika Holding Corp. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
27. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.

28. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
29. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
30. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
31. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.

32. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
33. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
34. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
35. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.

36. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
37. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
38. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
39. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
40. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
41. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.

42. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
43. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
44. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
45. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
46. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.

47. Street Fighter 6 on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
48. Capcom Q3 FY2025 Financial Results Presentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
49. Steam Keys - Steamworks Documentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
50. How to Set Parental Controls on PlayStation Consoles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
51. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.

52. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
53. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

21.4. Germany

Table 498. Germany Gaming Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Germany	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 499. Germany Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 500. Germany Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 501. Germany Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 502. Germany Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 503. Germany Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 504. Germany Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 505. Germany Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 506. Germany Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 507. Germany Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 508. Germany Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 509. Germany Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 510. Germany Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 511. Germany Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 512. Germany Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 513. Germany Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. Steamworks - Age Ratings Mandatory in Germany
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2024 German rating gate constrains catalog eligibility, not the magnitude of lost annual purchases; no automatic market-wide discount is applied.
9. Sony FY25.3Q Supplemental Information
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
10. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.

11. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

12. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
13. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
14. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

15. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
16. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
17. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
18. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
19. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
20. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

21. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
22. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
23. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

24. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
25. Playtika Holding Corp. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
26. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.

27. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
28. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
29. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
30. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.

31. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
32. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
33. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
34. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.

35. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
36. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
37. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
38. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
39. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
40. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.

41. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
42. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
43. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
44. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
45. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.

46. Street Fighter 6 on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
47. Capcom Q3 FY2025 Financial Results Presentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
48. Steam Keys - Steamworks Documentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
49. How to Set Parental Controls on PlayStation Consoles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
50. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.

51. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
52. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

21.5. United Kingdom

Table 514. United Kingdom Gaming Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
United Kingdom	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 515. United Kingdom Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 516. United Kingdom Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 517. United Kingdom Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 518. United Kingdom Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 519. United Kingdom Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 520. United Kingdom Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 521. United Kingdom Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 522. United Kingdom Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 523. United Kingdom Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 524. United Kingdom Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 525. United Kingdom Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 526. United Kingdom Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 527. United Kingdom Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 528. United Kingdom Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 529. United Kingdom Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. Sony FY25.3Q Supplemental Information
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
9. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.

10. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

11. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
12. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
13. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

14. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
15. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
16. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
17. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
18. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
19. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

20. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
21. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
22. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

23. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
24. Playtika Holding Corp. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
25. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.

26. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
27. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
28. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
29. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.

30. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
31. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
32. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
33. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.

34. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
35. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
36. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
37. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
38. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
39. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.

40. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
41. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
42. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
43. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
44. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.

45. Street Fighter 6 on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
46. Capcom Q3 FY2025 Financial Results Presentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
47. Steam Keys - Steamworks Documentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
48. How to Set Parental Controls on PlayStation Consoles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
49. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.

50. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
51. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

21.6. France

Table 530. France Gaming Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
France	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 531. France Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 532. France Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 533. France Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 534. France Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 535. France Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 536. France Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 537. France Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 538. France Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 539. France Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 540. France Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 541. France Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 542. France Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 543. France Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 544. France Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 545. France Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. Sony FY25.3Q Supplemental Information
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
9. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.

10. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

11. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
12. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
13. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

14. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
15. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
16. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
17. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
18. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
19. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

20. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
21. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
22. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

23. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
24. Playtika Holding Corp. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
25. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.

26. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
27. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
28. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
29. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.

30. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
31. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
32. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
33. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.

34. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
35. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
36. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
37. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
38. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
39. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.

40. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
41. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
42. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
43. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
44. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.

45. Street Fighter 6 on Steam
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.

46. Capcom Q3 FY2025 Financial Results Presentation
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.

47. Steam Keys - Steamworks Documentation
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.

48. How to Set Parental Controls on PlayStation Consoles
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.

49. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.

50. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
51. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

21.7. South Korea

Table 546. South Korea Gaming Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
South Korea	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 547. South Korea Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 548. South Korea Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 549. South Korea Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 550. South Korea Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 551. South Korea Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 552. South Korea Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 553. South Korea Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 554. South Korea Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 555. South Korea Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 556. South Korea Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 557. South Korea Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 558. South Korea Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 559. South Korea Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 560. South Korea Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 561. South Korea Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. KOCCA - 2025 Game User Survey press release
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official age-defined 2025 game-user survey reports participation of xx.xx%, down xx.xx percentage points. This reduces the modeled Korean audience and limits forecast audience expansion, without asserting an equal spending decline.
9. Sony FY25.3Q Supplemental Information
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
10. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.

11. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

12. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
13. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
14. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

15. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
16. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
17. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
18. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
19. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
20. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

21. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
22. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
23. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

24. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
25. Playtika Holding Corp. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
26. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.

27. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
28. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
29. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
30. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.

31. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
32. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
33. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
34. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.

35. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
36. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
37. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
38. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
39. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
40. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.

41. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
42. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
43. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
44. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
45. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.

46. Street Fighter 6 on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
47. Capcom Q3 FY2025 Financial Results Presentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
48. Steam Keys - Steamworks Documentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
49. How to Set Parental Controls on PlayStation Consoles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
50. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.

51. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
52. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

21.8. Canada

Table 562. Canada Gaming Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Canada	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 563. Canada Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 564. Canada Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 565. Canada Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 566. Canada Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 567. Canada Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 568. Canada Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 569. Canada Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 570. Canada Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 571. Canada Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 572. Canada Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 573. Canada Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 574. Canada Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 575. Canada Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 576. Canada Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 577. Canada Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. Sony FY25.3Q Supplemental Information
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
9. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.

10. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

11. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
12. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
13. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

14. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
15. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
16. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
17. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
18. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
19. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

20. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
21. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
22. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

23. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
24. Playtika Holding Corp. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
25. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.

26. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
27. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
28. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
29. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.

30. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
31. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
32. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
33. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.

34. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
35. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
36. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
37. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
38. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
39. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.

40. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
41. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
42. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
43. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
44. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.

45. Street Fighter 6 on Steam
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
46. Capcom Q3 FY2025 Financial Results Presentation
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
47. Steam Keys - Steamworks Documentation
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
48. How to Set Parental Controls on PlayStation Consoles
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
49. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.

50. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
51. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

21.9. Mexico

Table 578. Mexico Gaming Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Mexico	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 579. Mexico Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 580. Mexico Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 581. Mexico Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 582. Mexico Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 583. Mexico Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 584. Mexico Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 585. Mexico Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 586. Mexico Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 587. Mexico Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 588. Mexico Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 589. Mexico Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 590. Mexico Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 591. Mexico Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 592. Mexico Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 593. Mexico Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. Sony FY25.3Q Supplemental Information
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
9. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.

10. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

11. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
12. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
13. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

14. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
15. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
16. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
17. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
18. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
19. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

20. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
21. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
22. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

23. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
24. Playtika Holding Corp. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
25. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.

26. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
27. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
28. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
29. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.

30. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
31. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
32. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
33. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.

34. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
35. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
36. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
37. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
38. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
39. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.

40. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
41. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
42. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
43. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
44. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.

45. Street Fighter 6 on Steam
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.

46. Capcom Q3 FY2025 Financial Results Presentation
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.

47. Steam Keys - Steamworks Documentation
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.

48. How to Set Parental Controls on PlayStation Consoles
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.

49. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.

50. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
51. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

21.10. Brazil

Table 594. Brazil Gaming Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Brazil	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 595. Brazil Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 596. Brazil Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 597. Brazil Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 598. Brazil Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 599. Brazil Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 600. Brazil Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 601. Brazil Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 602. Brazil Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 603. Brazil Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 604. Brazil Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 605. Brazil Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 606. Brazil Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 607. Brazil Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 608. Brazil Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 609. Brazil Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. Brazil - Lei nº 14.852, de 3 de maio de 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Law xx.xx distinguishes covered electronic-game commercialization and wagering exclusions while retaining other legal/classification conditions; it does not quantify sales growth.
9. Sony FY25.3Q Supplemental Information
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
10. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.

11. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

12. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
13. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
14. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

15. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
16. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
17. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
18. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
19. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
20. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

21. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
22. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
23. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

24. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
25. Playtika Holding Corp. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
26. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.

27. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
28. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
29. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
30. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.

31. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
32. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
33. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
34. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.

35. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
36. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
37. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
38. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
39. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
40. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.

41. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
42. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
43. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
44. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
45. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.

46. Street Fighter 6 on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
47. Capcom Q3 FY2025 Financial Results Presentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
48. Steam Keys - Steamworks Documentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
49. How to Set Parental Controls on PlayStation Consoles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
50. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.

51. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
52. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

21.11. Australia

Table 610. Australia Gaming Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 611. Australia Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 612. Australia Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 613. Australia Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 614. Australia Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 615. Australia Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 616. Australia Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 617. Australia Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 618. Australia Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 619. Australia Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 620. Australia Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 621. Australia Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 622. Australia Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 623. Australia Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 624. Australia Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 625. Australia Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. Playtika Holding Corp. Form 10-K for the year ended December 31, 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia participates in that combined concentration; the model does not infer an exact Australian supplier share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
9. Australian Classification - New classifications for gambling-like content in video games
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: September xx.xx 2024 classification changes establish feature-specific audience restrictions; they are not a measured general Gaming-spending haircut or exclusion of the included Social Casino genre.

10. Sony FY25.3Q Supplemental Information
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
11. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
12. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

13. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
14. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
15. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

16. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
17. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
18. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
19. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
20. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
21. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

22. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
23. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
24. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

25. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
26. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
27. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
28. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.

29. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
30. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
31. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.

32. 2025 Essential Facts About the U.S. Video Game Industry

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.

33. GDC 2025: The Past, Present and Future of Developing VR and MR

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.

34. GDC 2026: State of VR

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.

35. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.

36. Scopely to Acquire Niantic's Games Business

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.

37. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
38. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
39. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
40. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
41. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
42. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.

43. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
44. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
45. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
46. Street Fighter 6 on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
47. Capcom Q3 FY2025 Financial Results Presentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
48. Steam Keys - Steamworks Documentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.

49. How to Set Parental Controls on PlayStation Consoles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
50. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
51. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
52. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

21.12. Italy

Table 626. Italy Gaming Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Italy	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 627. Italy Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 628. Italy Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 629. Italy Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 630. Italy Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 631. Italy Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 632. Italy Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 633. Italy Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 634. Italy Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 635. Italy Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 636. Italy Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 637. Italy Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 638. Italy Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 639. Italy Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 640. Italy Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 641. Italy Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.
5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.

7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. Sony FY25.3Q Supplemental Information
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
9. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
10. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

11. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
12. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
13. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

14. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
15. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
16. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
17. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
18. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
19. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

20. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
21. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
22. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

23. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
24. Playtika Holding Corp. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
25. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.

26. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
27. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
28. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
29. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.

30. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
31. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
32. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
33. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.

34. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
35. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
36. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
37. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
38. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
39. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.

40. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
41. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
42. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
43. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
44. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.

45. Street Fighter 6 on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
46. Capcom Q3 FY2025 Financial Results Presentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
47. Steam Keys - Steamworks Documentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
48. How to Set Parental Controls on PlayStation Consoles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
49. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.

50. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
51. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

21.13. Spain

Table 642. Spain Gaming Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Spain	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 643. Spain Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 644. Spain Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 645. Spain Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 646. Spain Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 647. Spain Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 648. Spain Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 649. Spain Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 650. Spain Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 651. Spain Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 652. Spain Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 653. Spain Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 654. Spain Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 655. Spain Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 656. Spain Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 657. Spain Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. Sony FY25.3Q Supplemental Information
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
9. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.

10. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

11. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
12. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
13. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

14. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
15. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
16. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
17. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
18. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
19. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

20. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
21. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
22. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

23. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
24. Playtika Holding Corp. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
25. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.

26. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
27. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
28. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
29. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.

30. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
31. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
32. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
33. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.

34. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
35. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
36. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
37. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
38. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
39. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.

40. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
41. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
42. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
43. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
44. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.

45. Street Fighter 6 on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
46. Capcom Q3 FY2025 Financial Results Presentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
47. Steam Keys - Steamworks Documentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
48. How to Set Parental Controls on PlayStation Consoles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
49. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.

50. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
51. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

21.14. Russia

Table 658. Russia Gaming Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Russia	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 659. Russia Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 660. Russia Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 661. Russia Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 662. Russia Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 663. Russia Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 664. Russia Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 665. Russia Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 666. Russia Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 667. Russia Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 668. Russia Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 669. Russia Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 670. Russia Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 671. Russia Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 672. Russia Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 673. Russia Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. Sony FY25.3Q Supplemental Information
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
9. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.

10. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

11. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
12. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
13. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

14. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
15. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
16. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
17. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
18. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
19. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

20. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
21. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
22. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

23. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
24. Playtika Holding Corp. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
25. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.

26. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
27. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
28. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
29. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.

30. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
31. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
32. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
33. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.

34. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
35. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
36. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
37. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
38. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
39. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.

40. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
41. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
42. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
43. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
44. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.

45. Street Fighter 6 on Steam
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.

46. Capcom Q3 FY2025 Financial Results Presentation
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.

47. Steam Keys - Steamworks Documentation
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.

48. How to Set Parental Controls on PlayStation Consoles
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.

49. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.

50. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
51. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

21.15. India

Table 674. India Gaming Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
India	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 675. India Gaming Market Size, by Offering, 2017-2040 (USD Million)

Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Dedicated Gaming Devices	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Software & Content	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Peripherals & Accessories	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Play-Access Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 676. India Gaming Market Size, by Game Software & Content, 2017-2040 (USD Million)

Game Software & Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Base Games	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Expansions & Playable Add-Ons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
In-Game Items, Currency & Features	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 677. India Gaming Market Size, by Dedicated Gaming Devices, 2017-2040 (USD Million)

Dedicated Gaming Devices	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Gaming XR Headsets	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Handheld Gaming Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Gaming Consoles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 678. India Gaming Market Size, by Play-Access Services, 2017-2040 (USD Million)

Play-Access Services	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cloud Gaming Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game-Library Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Online Multiplayer & Platform Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Game Access	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 679. India Gaming Market Size, by Gaming Platform, 2017-2040 (USD Million)

Gaming Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Connected TV Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Console Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Platform Offerings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
PC Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standalone XR Platforms	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 680. India Gaming Market Size, by Immersion Technology, 2017-2040 (USD Million)

Immersion Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Augmented & Mixed Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Combined Immersion Modes	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Conventional Screen-Based Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Virtual Reality Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 681. India Gaming Market Size, by Primary Play Purpose, 2017-2040 (USD Million)

Primary Play Purpose	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Fitness & Physical Activity	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Learning & Education	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Recreation & Entertainment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 682. India Gaming Market Size, by Player Age, 2017-2040 (USD Million)

Player Age	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Children	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle-Aged Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Older Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Teenagers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Young Adults	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 683. India Gaming Market Size, by Content Fulfillment Format, 2017-2040 (USD Million)

Content Fulfillment Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Digital Delivery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Physical Game Media	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 684. India Gaming Market Size, by Game Execution Model, 2017-2040 (USD Million)

Game Execution Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Local & Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Local Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Remote Execution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 685. India Gaming Market Size, by Connectivity Requirement, 2017-2040 (USD Million)

Connectivity Requirement	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Always-Online Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Offline Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Periodic Online Validation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 686. India Gaming Market Size, by Distribution Channel, 2017-2040 (USD Million)

Distribution Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Producer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gaming Platforms & App Stores	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retailers & Reseller Marketplaces	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Telecom & Cross-Service Bundles	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 687. India Gaming Market Size, by Revenue Mechanism, 2017-2040 (USD Million)

Revenue Mechanism	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Add-On & Virtual-Item Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Game Advertising	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Product Purchases	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Subscription & Term-Access Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Usage-Based Play Fees	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 688. India Gaming Market Size, by Game Genre, 2017-2040 (USD Million)

Game Genre	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Action-Adventure & Survival	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Board & Card	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fighting & Combat	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Idle & Incremental	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Music & Rhythm	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Narrative Adventure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Party & Social Play	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Platformers & Arcade Action	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Puzzle	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Racing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Role-Playing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Shooters	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Simulation & Sandbox	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Social Casino	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Strategy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Word & Trivia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 689. India Gaming Market Size, by Player Participation, 2017-2040 (USD Million)

Player Participation	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Multiplayer Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player & Multiplayer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Single-Player Only	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Apple celebrates a groundbreaking year in entertainment
   - Evidence informing the 2022 market-value input; displayed series and growth include calculations: The cumulative developer-earnings disclosure is a historical commercial anchor; it includes nongaming applications and is not the 2022 Gaming market value.
2. FY26.1Q Supplemental Information
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: FY25 network-services revenue of JPY xx.xx and April-June 2026 operating disclosures constrain the access-services forecast; they do not independently establish future renewal or market growth.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sony reports digital software and add-on revenue gross at retail transaction prices; this supports single-counted platform checkout and the channel valuation bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FY25 network-services revenue of JPY xx.xx constrains the scale of paid-access packages; the combined-cloud fraction is modeled, not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate digital software and add-on disclosures support continuing-content monetization as a model input, but do not identify multiplayer-only expenditure.
3. Microsoft Corporation 2025 Proxy Statement
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: Reported access-services revenue supports the existence and scale of paid library access, but not the modeled 2032 subscriber growth, retention or incremental purchasing assumptions.
4. ITU's Facts and Figures 2025 shows steady progress in connectivity, while highlighting gaps in quality and affordability
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The observed Internet-user pool and documented affordability differences constrain long-term audience expansion and support declining modeled volume-growth rates, not a directly observed 2040 market value.

5. Meta Platforms, Inc. Form 10-Q for the Quarter Ended June 30, 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: Meta reports that second-quarter 2026 Reality Labs revenue increased xx.xx%, driven by AI glasses and partially offset by lower Quest sales. The model therefore does not treat overall Reality Labs growth as Gaming XR growth.
6. Nintendo Co., Ltd. Annual Report 2021
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: For the year ended March 2021, Nintendo reports xx.xx hardware units, up xx.xx%; xx.xx software units, up xx.xx%; and digital sales of JPY xx.xx, up xx.xx%. These constrain the pandemic-era historical bridge, with fiscal-to-calendar timing uncertainty.
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: The same disclosed purchasing expansion supports elevated pandemic-era activity, but is not a calendar-2021 global total.
7. Apple services enrich peoples' lives throughout the year
   - Evidence informing the 2021 market-value input; displayed series and growth include calculations: Apple's January 2022 disclosure reports cumulative developer earnings exceeding USD xx.xx. Together with subsequent disclosures, it constrains historical digital purchasing, while retaining nongaming-app and commission-mix adjustments.
8. Sony FY25.3Q Supplemental Information
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Quarterly digital full-game and add-on receipts constrain the software/content calibration; they are not the global parent total.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital full-game receipts provide an observed base-game input, with physical retail purchasing modeled separately.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The add-on category includes expansions and virtual purchases; their separation requires an explicit modeled attribution.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported add-on receipts constrain supplemental purchasing, not a directly observed global item share.
9. Nintendo Financial Results Explanatory Material - Nine Months Ended December 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nintendo reports xx.xx Switch xx.xx sell-in units through December 2025, constraining the inherited device-purchasing model.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switch xx.xx and older Switch units support handheld-system value weights, subject to modeled realization and sell-through bridges.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed digital-sales ratio includes subscriptions/add-ons and mixed gross/net reporting; it constrains, but is not the complement of, physical-payload value.

10. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nearly USD xx.xx fiscal-2025 Game Pass revenue constrains the access-service proxy; it does not independently verify the global access budget.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game Pass revenue supplies a starting monetary weight for library access; allocation among bundled benefits remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx cloud-play hours establish aggregate commercial activity, not attributable cloud revenue or the modeled future growth rate.

11. Electronic Arts Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 full-game revenue of USD xx.xx supplies a representative monetization-mix check, not a global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Extra-content revenue of USD xx.xx confirms substantial supplemental purchasing, without separating every expansion and item.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Packaged revenue of USD xx.xx versus USD xx.xx previously constrains the direction, not the magnitude, of the modeled physical decline.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx digital full-game revenue supports digital predominance; the forecast additionally requires explicit platform-specific assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing distinguishes full-game and additional-content receipts, supporting the revenue-mechanism bridge without adding publisher and platform receipts twice.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 bookings of USD xx.xx and material football franchises provide the sports calibration input; xx.xx% sports attribution is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx live-services-and-other revenue versus USD xx.xx total constrains recurring-content monetization but does not equate live services with multiplayer-only support.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Apex Legends and Battlefield commercial activity supports shooter purchasing as a monetized category; the Global payer and realization parameters remain assumptions.
12. Logitech International Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 Gaming sales of USD xx.xx constrain the inherited peripheral retail-value model after explicit scope and retail-margin adjustments.
13. Microsoft Game Development - Xbox Play Anywhere
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qualifying purchases supply Xbox and Windows PC entitlement, while cross-play is separately optional. This supports the rights-based mapping, not the assumed revenue transfer.

14. Minecraft Franchise Fact Sheet - October 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The October 2021 fact sheet reports more than xx.xx licensed education students and teachers. The model explicitly bridges this historical permission stock into assumed annual paid-equivalent expenditure.
15. Minecraft Education - Licensing and Purchasing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Academic USD xx.xx and commercial USD xx.xx annual prices establish distinct purchasing routes and a license-price constraint; modeled cohorts, bundle attribution and future growth remain assumptions.
16. FitXR Help Center - How Much Does a FitXR Membership Cost?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2026 US annual membership price of USD xx.xx constrains a modeled USD xx.xx realized annual value; neither payer volume nor 2025 price is presented as observed.
17. Nintendo Support - Ring Fit Adventure Q&A
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The USD xx.xx game/accessory package constrains the software-value allocation and documents equipment dependencies; it does not measure annual fitness-game demand.
18. Nintendo Switch 2 - Game-Key Cards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Game-key cards contain no game data, so physical packaging alone is insufficient for physical-payload attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Downloaded game-key-card payload is classified as digital delivery under the disclosed study rule.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Initial downloading and subsequent offline startup are distinguished, preventing digital fulfillment from automatically becoming always-online use.
19. Nintendo Support - Can These Classic Games Be Played Indefinitely?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified classic collections permit offline sessions but require membership verification every seven days, supporting the periodic-validation category without measuring its sales weight.

20. GOG Developer Documentation - Introduction
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Optional-client and offline-installer arrangements establish an offline entitlement pattern; the commercial value coefficient remains explicitly modeled.
21. PlayStation Blog - Your Guide to the All-New PlayStation Plus
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tiered catalog benefits support allocating part of bundled access receipts to library access; the benefit weight is not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guide distinguishes online-multiplayer benefits within the service bundle, supporting separate benefit attribution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cloud streaming is a separately identified bundled benefit rather than an additional full subscription receipt.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated guide requires seven-day validation for downloaded Extra/Premium catalog games, supporting the modeled periodic-access pattern.
22. NVIDIA Blog - Welcome to GeForce NOW Performance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November 2024 disclosure says xx.xx% of members fit within the announced allowance and distinguishes extra-hour purchases from grandfathered unlimited 2025 memberships. These facts constrain the small usage-fee model.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Membership allowances and separately purchased extra hours support partitioning access receipts into term fees and usage fees without counting both as full memberships.

23. Roblox Launches Rewarded Video Ads, Partners With Google to Scale Immersive Advertising
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: April 2025 planned direct and programmatic Rewarded Video buying supports the commercial advertising category and procurement premise, not the modeled global expenditure or future adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertisers purchase an in-experience placement through a distinct buying relationship; no separate publisher-plus-intermediary revenue is added.
24. Playtika Holding Corp. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 direct-to-consumer revenue of USD xx.xx out of USD xx.xx produces a xx.xx% company-specific checkout anchor; Global and forecast mixes remain modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party-platform receipts and gross principal accounting constrain platform versus direct attribution without adding platform fees as separate market expenditure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Social-casino-themed games generated xx.xx% of 2025 revenue; their revenue declined xx.xx%, providing a monetary category input and counterevidence to uniform growth.
25. Take-Two Interactive Software, Inc. Form 10-K for the Fiscal Year Ended March 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Fiscal-2025 net revenue of USD xx.xx and the NBA 2K/WWE 2K portfolio constrain the modeled sports numerator; the xx.xx% sports attribution and retail bridge are assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Take-Two reports xx.xx% of mobile revenue through Apple and Google, an independent check against applying a specialized publisher's direct-commerce mix globally.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its disclosed digital-channel concentration and continuing Grand Theft Auto purchasing support the presence and scale of action-adventure commerce, not a directly observed Global genre share.

26. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 bookings of USD xx.xx provide a purchasing-scale input; the xx.xx% sandbox allocation is explicitly modeled and not Roblox's disclosed genre mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same bookings anchor supports the separate assumed xx.xx% social-play attribution; it is not added again as company revenue or creator payouts.
27. Gravity Reports Consolidated Financial Results for 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gravity reports 2025 online-game revenue of USD xx.xx and mobile-game revenue of USD xx.xx using its convenience currency conversion; these constrain an RPG supplier-to-retail proxy.
28. Nintendo Consolidated Financial Results for the Nine Months Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Mario Kart World sales of xx.xx units in April-December 2025, including bundles, constrain racing activity; USD realization and calendar attribution are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digital-sales disclosure and physical/software-unit activity support a mixed console checkout bridge, not an observed Global retail percentage.
29. Online Activities of Canadian Youth, Cybervictimization and Exposure to Harmful Content
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 survey reports online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx; these constrain, but do not directly measure, the modeled xx.xx-xx.xx purchasing cohort.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Online-game participation of xx.xx% for ages xx.xx-xx.xx and xx.xx% for xx.xx-xx.xx constrains the middle-aged participation assumption, with geographic and activity-definition adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed online gameplay of xx.xx% for ages xx.xx+ establishes material older-player activity; relative spending and forecast adoption remain modeled.

30. Annual ESA Study Reveals Video Games' Universal Appeal Across Generations
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February 2025 US survey of xx.xx respondents reports weekly gaming among xx.xx% of ages xx.xx-xx.xx; the Global child participation and expenditure adjustments remain assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same survey reports weekly gaming among xx.xx% of adults, constraining the adult participation scale without establishing age-specific spending.
31. 2025 Essential Facts About the U.S. Video Game Industry
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The survey reports xx.xx% of players playing with others weekly, supporting a participation plausibility check while explicitly differing from expenditure and edition-support shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed social play does not distinguish multiplayer-only from combined-support editions; it constrains their joint scale rather than verifying either individual share.
32. GDC 2025: The Past, Present and Future of Developing VR and MR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than USD xx.xx cumulative Quest-title payments and approximately xx.xx% payment growth in 2024 constrain commercial scale; they do not disclose annual 2025 VR-only receipts.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official discussion identifies an expanded MR-capable audience and changing paid-content economics; exclusive-MR revenue and mode fractions remain modeled.
33. GDC 2026: State of VR
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Meta reports only slight Horizon Store revenue growth in 2025 despite increased usage; this independently limits the modeled VR-content growth assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Store monetization did not accelerate in line with usage, qualifying stronger revenue assumptions for combined immersive editions.

34. Meta Platforms, Inc. Form 10-K for the Year Ended December 31, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2025 filing says Reality Labs revenue growth was driven by AI glasses and partially offset by lower Quest sales; nongaming glasses growth is not used as a Gaming-VR growth proxy.
35. Scopely to Acquire Niantic's Games Business
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Niantic's acquired game business generated more than USD xx.xx revenue in 2024 and served more than xx.xx monthly players; the 2025 nominal and optional-AR attribution bridges are assumptions.
36. What's Changing with AR in Pokémon GO?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Official current support describes AR-disabled interaction routes, supporting optional rather than universally exclusive AR classification; exact historical edition coverage remains a gap.
37. Beat Saber on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official Beat Saber listing specifies VR Only, providing an edition-level classification premise rather than a sales weight.
38. Demeo on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Demeo's official listing specifies VR Supported, substantiating a combined conventional/VR edition category without proving every storefront's entitlements.
39. Mixed Reality Game Starship Home
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: CREATURE markets Starship Home as mixed reality for Meta Quest xx.xx; this establishes commercial positioning, not exhaustive edition exclusivity or the modeled revenue fraction.

40. Frequently Asked Questions for GeForce NOW
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: GeForce NOW requires supported-store ownership for paid games, supporting separate content-entitlement and remote-service purchasing rather than duplicate content sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supported-store model establishes conditional local/cloud eligibility; Global eligible-software value fractions remain modeled.
41. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Microsoft reports nearly USD xx.xx annual Game Pass revenue and more than xx.xx cloud-streamed hours in fiscal 2025, constraining paid-access scale without disclosing the model's combined-tier fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed cloud-streamed activity establishes commercial use, but does not verify the modeled paid remote-only relationship count.
42. Getting Started with Xbox Cloud Gaming
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: December 2025 guidance documents Game Pass downloads alongside cloud streaming and selected owned-game eligibility, supporting conditional combined-access classification.
43. CMA Publishes Provisional Findings in Mobile Browsers and Cloud Gaming Market Investigation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA identifies approximately xx.xx UK mobile-cloud users in 2024; the narrow device/geography scope limits extrapolation to Global remote-service spending.
44. Cookie Clicker on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cookie Clicker is described as idle despite Simulation/Strategy metadata, supporting a distinct dominant-loop allocation rather than duplicate genre counting.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Its single-player designation coexists with Workshop and cloud features, supporting participation classification based on playable support rather than surrounding community functions.

45. Street Fighter 6 on Steam
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Street Fighter xx.xx includes solo World Tour and human multiplayer offerings, supporting combined participation rather than inferring multiplayer-only status from fighting genre.
46. Capcom Q3 FY2025 Financial Results Presentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Capcom reports xx.xx Street Fighter xx.xx units for April-December 2025 and xx.xx lifetime units, constraining fighting-game commercial scale without directly measuring annual Global genre spending.
47. Steam Keys - Steamworks Documentation
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official documentation distinguishes external key sales from Steam activation, supporting allocation by checkout rather than assigning all activated licenses to platform sales.
48. How to Set Parental Controls on PlayStation Consoles
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Child-account purchases use the family manager's wallet; this supports intended-player attribution while distinguishing the child from the purchasing approver.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documented spending controls support a parental-approval boundary for child accounts, not a measured Global teenage purchasing-conversion effect.
49. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NetEase reports RMB xx.xx games-related revenue, xx.xx% from online games, and material RPG franchises; this independently constrains supplier scale but not the Global genre allocation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same disclosure identifies Marvel Rivals among growth contributors, providing an additional shooter-commerce scale check without a disclosed shooter revenue split.

50. Microsoft / Activision Blizzard Merger Inquiry - Final Report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The CMA's genre-overlap assessment requires an explicit analytical allocation convention for hybrid action/RPG titles; it does not establish separate genre market shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Overlapping genre labels support dominant-proposition attribution for role-playing editions rather than counting one purchase in multiple peers.
51. Just Dance - January Update
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ubisoft distinguishes purchased Music Packs from Just Dance+ membership and identifies edition-specific access, supporting content-versus-service attribution rather than counting both as the same purchase.

22. Competitive Landscape

22.1. Market Share Analysis, 2025

Competitive positioning in Gaming depends on the account relationship a supplier can serve. Microsoft Corporation, Sony Group Corporation, and Nintendo Co., Ltd. combine equipment, content, and services, but households still purchase distinct benefits. ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■ ■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■ ■■■■ ■■■■■■ ■■■■ ■■■■ ■■ ■■■■■■■■■ ■■■■■■■ ■■ ■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■

Independent publishing and direct sales remain realistic alternatives to an integrated platform relationship. Valve Corporation documents publisher onboarding and external Steam-key distribution. ■■■ ■■■ ■ ■■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■■ ■■■■ ■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■ ■■■■■■■■■■ ■■ ■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■

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Cloud-service positioning also depends on what membership supplies. NVIDIA Corporation requires applicable supported-store entitlements for GeForce NOW, whereas Blacknut presents a subscription including its streaming library. ■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■ ■ ■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■ ■ ■■■■■■■■■■ ■■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■ ■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■

Advertising account access is similarly format-specific. ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■ ■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■ ■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■ ■■ ■■■■ ■■■■■ ■■ ■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■ Brands should distinguish buying media from commissioning an independently operated branded experience and require the corresponding placement, reporting, and support commitments.

Figure 38. Global Gaming Market Share, by Key Player, 2025

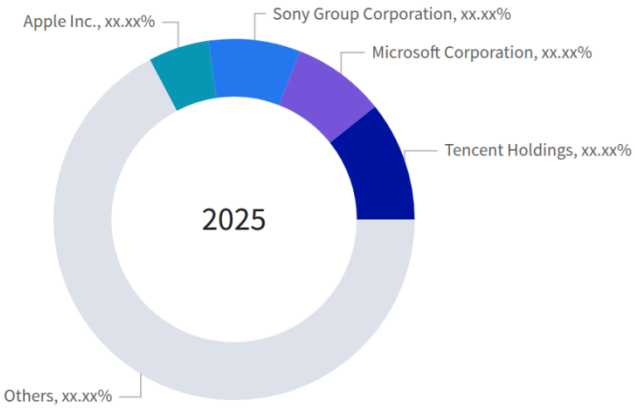

Table 690. Global Gaming Market Share, by Key Player, 2025

Key Player	Share (%)
AccelByte	xx.xx
AEXLAB	xx.xx
Afterverse	xx.xx
AJB Games Studio	xx.xx
Amanotes	xx.xx
Aonic	xx.xx
Apple Inc.	xx.xx
AppLovin Corporation	xx.xx
Ard Games	xx.xx
Aristocrat Leisure Limited	xx.xx
ARVORE Immersive Games Inc.	xx.xx
Asphere Innovations Public Company Limited	xx.xx
Atari	xx.xx
AZUR GAMES	xx.xx
Bandai Namco Holdings Inc.	xx.xx
Behaviour Interactive	xx.xx
Bigger Games	xx.xx
Bilibili	xx.xx
Blacknut	xx.xx
Bloober Team	xx.xx
Bohemia Interactive	xx.xx

Table 690 - continued

Key Player	Share (%)
Boosteroid	xx.xx
Bromio	xx.xx
Candivore	xx.xx
CAPCOM CO., LTD.	xx.xx
CD PROJEKT S.A.	xx.xx
Chickmania	xx.xx
CipSoft GmbH	xx.xx
Cloud Imperium Games	xx.xx
Coffee Stain	xx.xx
COLOPL	xx.xx
Com2uS	xx.xx
ConcernedApe	xx.xx
Corsair Gaming, Inc.	xx.xx
Creepy Jar	xx.xx
CyberAgent, Inc.	xx.xx
Dedalord	xx.xx
Devsisters	xx.xx
Digital Bros	xx.xx
Dinosaur Polo Club	xx.xx
Dream Games	xx.xx
Dumativa	xx.xx
DuoLabz	xx.xx
East Side Games Group Inc.	xx.xx
Electronic Arts Inc.	xx.xx
Embracer Group	xx.xx
Endnight Games	xx.xx
Epic Games, Inc.	xx.xx
Etermax	xx.xx
everplay plc	xx.xx
Facepunch Studios Ltd	xx.xx
Fanatee	xx.xx
Fast Travel Games AB	xx.xx

Table 690 - continued

Key Player	Share (%)
Fingersoft	xx.xx
Frontier Developments plc	xx.xx
FRVR	xx.xx
Fugo	xx.xx
FunPlus	xx.xx
Funtap	xx.xx
G-bits	xx.xx
G5 Entertainment AB (publ)	xx.xx
Gaijin Entertainment	xx.xx
Gamania Digital Entertainment Co., Ltd.	xx.xx
Game District	xx.xx
Gameberry Labs	xx.xx
Gamefam	xx.xx
Gameloft S.E.	xx.xx
Games2win	xx.xx
GDEV	xx.xx
GIANTS Software GmbH	xx.xx
GN Group	xx.xx
Good Job Games	xx.xx
Google	xx.xx
Grand Games	xx.xx
GSC Game World	xx.xx
Guillemot Corporation	xx.xx
Halberd Studios	xx.xx
Halfbrick	xx.xx
Hammer Games	xx.xx
Hasbro, Inc.	xx.xx
Heroic Labs	xx.xx
Highbit Game Studio	xx.xx
Hinterland Studio Inc.	xx.xx
Hipster Whale Pty Ltd	xx.xx
HOMA GAMES SAS	xx.xx

Table 690 - continued

Key Player	Share (%)
Hooded Horse	xx.xx
HP	xx.xx
Hyper Hippo Entertainment Ltd.	xx.xx
HyperBeard, Inc.	xx.xx
iCandy Interactive Limited	xx.xx
IGG	xx.xx
Immutable	xx.xx
IO Interactive	xx.xx
Ironhide Game Studio	xx.xx
JetSynthesys	xx.xx
Kakao Games	xx.xx
Kayfo Games	xx.xx
Keen Games	xx.xx
Kingsoft Corporation Limited	xx.xx
KOEI TECMO HOLDINGS CO., LTD.	xx.xx
KONAMI GROUP CORPORATION	xx.xx
KRAFTON, Inc.	xx.xx
Kurechii	xx.xx
LEVEL5 Inc.	xx.xx
Lienzo	xx.xx
Light & Wonder, Inc.	xx.xx
Lilith Games	xx.xx
Logitech International S.A.	xx.xx
Ludeon Studios	xx.xx
Mad Mimic	xx.xx
MAG Interactive	xx.xx
Marvelous INC.	xx.xx
Maxflow BV	xx.xx
Maysalward	xx.xx
Meta Platforms, Inc.	xx.xx
Mezan Studios	xx.xx
Microids	xx.xx

Table 690 - continued

Key Player	Share (%)
Microsoft Corporation	xx.xx
MIXI, Inc.	xx.xx
MobilityWare, LLC	xx.xx
Modern Times Group MTG AB	xx.xx
MOONTON Games	xx.xx
MY.GAMES	xx.xx
NACON	xx.xx
Navegante	xx.xx
Nazara Technologies Limited	xx.xx
NC Corporation	xx.xx
Nekki	xx.xx
NEOWIZ	xx.xx
NetEase, Inc.	xx.xx
Netmarble Corporation	xx.xx
NEXON Co., Ltd.	xx.xx
Nintendo Co., Ltd.	xx.xx
Nordcurrent	xx.xx
NVIDIA Corporation	xx.xx
Offworld Industries	xx.xx
Ogre Pixel	xx.xx
Outfit7	xx.xx
Owlcat Games	xx.xx
Paeezan Game Studio	xx.xx
paibandstudio.com	xx.xx
Paradox Interactive	xx.xx
Passion Republic Games	xx.xx
Pearl Abyss	xx.xx
People Can Fly	xx.xx
Perfect World	xx.xx
PikPok	xx.xx
Pixel Federation	xx.xx
Playrix	xx.xx

Table 690 - continued

Key Player	Share (%)
PlaySide Studios Limited	xx.xx
PLAYSTUDIOS	xx.xx
Playtika Holding Corp.	xx.xx
Pocketpair, Inc.	xx.xx
Poki B.V.	xx.xx
Pomelo Games	xx.xx
PT Megaxus Infotech	xx.xx
PULLUP Entertainment	xx.xx
Pulsatrix Studios	xx.xx
Ranida Games	xx.xx
Razer	xx.xx
Red Barrels Inc.	xx.xx
Relic Entertainment	xx.xx
Remedy Entertainment Plc	xx.xx
Resolution Games	xx.xx
Riseup Labs	xx.xx
Roblox Corporation	xx.xx
Rogue Snail	xx.xx
RuneStorm	xx.xx
Sablo Studio	xx.xx
Sabotage Studio	xx.xx
Savvy Games Group	xx.xx
SayGames	xx.xx
SCS Software	xx.xx
Sea Limited	xx.xx
SEGA SAMMY HOLDINGS INC.	xx.xx
SHIFT UP	xx.xx
Sky Mavis	xx.xx
Skybound Games	xx.xx
Slitherine Software UK Ltd	xx.xx
SOFT-WORLD INTERNATIONAL CORPORATION	xx.xx
Sony Group Corporation	xx.xx

Table 690 - continued

Key Player	Share (%)
Spoilz	xx.xx
Spritewrench	xx.xx
Spyke Games	xx.xx
SQUARE ENIX HOLDINGS CO., LTD.	xx.xx
Stillfront Group AB	xx.xx
Studio MDHR	xx.xx
SuperGaming Pte Ltd	xx.xx
Tactile Games	xx.xx
Take-Two Interactive Software, Inc.	xx.xx
TaleWorlds Entertainment	xx.xx
Tamatem Games	xx.xx
Tapps Games	xx.xx
Team Cherry	xx.xx
Ten Square Games S.A.	xx.xx
Tencent Holdings Limited	xx.xx
The Brotherhood	xx.xx
The Game Storm Studios	xx.xx
The New York Times Company	xx.xx
Theorycraft Games	xx.xx
Thunder Lotus	xx.xx
tinyBuild	xx.xx
Tlön Industries	xx.xx
Toge Productions	xx.xx
Travian Games	xx.xx
Tripledot Studios	xx.xx
Turtle Beach	xx.xx
Two Desperados	xx.xx
Ubisoft Entertainment SA	xx.xx
UMX Studio	xx.xx
Unity Software Inc.	xx.xx
Uplift Games	xx.xx
URK Studios	xx.xx

Table 690 - continued

Key Player	Share (%)
Valve Corporation	xx.xx
VNG	xx.xx
Voldex	xx.xx
Voodoo	xx.xx
VRChat	xx.xx
Wargaming	xx.xx
Warner Bros. Games	xx.xx
WEBZEN	xx.xx
WEMADE	xx.xx
Wildlife Studios	xx.xx
Wube Software	xx.xx
X-LEGEND	xx.xx
XD Inc.	xx.xx
xx.xx bit studios S.A.	xx.xx
xx.xx Interactive Entertainment	xx.xx
Yalla Group Limited	xx.xx
Yarsa Games	xx.xx
YOOZOO Games	xx.xx
Ziff Davis, Inc.	xx.xx
Others	xx.xx

Sources & Evidence

1. GeForce NOW FAQs
   - GeForce NOW requires applicable supported-store game entitlements and distinguishes directly served and Alliance-partner territories. ([nvidia.com](https://www.nvidia.com/en-us/geforce-now/faq/))
   - Evidence informing base-year company-share estimates: The FAQ separates required game entitlements and directly operated versus Alliance-partner service territories, constraining the attributable service numerator. ([nvidia.com](https://www.nvidia.com/en-us/geforce-now/faq/))
2. Onboarding - Steamworks Documentation
   - Steam onboarding requires a contracting publisher relationship, documentation, review, and adequate content rights. ([partner.steamgames.com](https://partner.steamgames.com/doc/gettingstarted/onboarding))
   - Evidence informing base-year company-share estimates: Establishes the rights-holding contracting entity and commercial onboarding requirements; these conditions do not independently measure game demand. ([partner.steamgames.com](https://partner.steamgames.com/doc/gettingstarted/onboarding))
3. Nintendo Annual Report 2026 - Fiscal Year Ended March 31, 2026
   - Nintendo's hardware, software, and service relationships support an integrated ecosystem comparison without establishing interchangeable customer rights. ([nintendo.co.jp](https://www.nintendo.co.jp/ir/pdf/2026/annual2603e.pdf))

4. PlayStation Plus - Membership Features and Frequently Asked Questions
   · PlayStation Plus supplies multiplayer and catalog benefits; most purchased-game online play requires membership, while most free-to-play multiplayer titles do not. ([playstation.com](https://www.playstation.com/en-us/ps-plus/))
5. NPPA - Approval of Internet Game Works Authorized by Overseas Copyright Holders
   · NPPA's imported internet-game requirements distinguish publishing qualification, copyright-contract registration, and an ICP-licensed operator. ([nppa.gov.cn](https://www.nppa.gov.cn/bsfw/xksx/cbfxl/wlcbfwspsx/xx.xx/t20221013_600723.html))
6. Xbox Game Pass - Plans and Features
   · Xbox presents distinct Game Pass plans and content, multiplayer, and cloud benefits rather than one universal entitlement. ([xbox.com](https://www.xbox.com/en-US/xbox-game-pass))
7. Steam Keys - Steamworks Documentation
   · Steam Keys allow external checkout to activate Steam product licenses and retain publisher distribution responsibilities. ([partner.steamgames.com](https://partner.steamgames.com/doc/features/keys))
   · Evidence informing base-year company-share estimates: Documents external Steam-key checkout and continuing publisher responsibilities, supporting separation of activation from fee-bearing storefront purchasing. ([partner.steamgames.com](https://partner.steamgames.com/doc/features/keys))
8. Introduction - GOG Developer Docs
   · GOG documents an optional GALAXY client and offline installers, distinguishing offline functionality from optional online features. ([docs.gog.com](https://docs.gog.com/introduction/))
9. Immersive Ads on Roblox
   · Roblox's advertiser portfolio presents programmatic and managed-service buying routes and labels Homepage Feature as beta. ([brands.roblox.com](https://brands.roblox.com/advertising))
10. Play Games on Mobile Devices
    · Netflix mobile games require active membership and compatible devices and exclude advertising and in-app purchases. ([help.netflix.com](https://help.netflix.com/en/node/xx.xx))
11. Nuuvem: Seu Jogo no Mercado Latinoamericano
    · Nuuvem advertises merchant-of-record services, local payments, key management, and Portuguese and Spanish support. ([nuuvem.com](https://www.nuuvem.com/lp/pt/partners/))
12. Services - Tamatem Games
    · Tamatem advertises cultural localization, marketing, analytics, and continuing community support. These are offered services, not guaranteed outcomes. ([tamatem.co](https://tamatem.co/service/))
13. Publishing - Carry1st
    · Carry1st offers localization, alternative distribution, audience engagement, and tailored live operations for African game audiences. ([carry1st.com](https://carry1st.com/publishing))
14. Issues with COD Points Purchases for Call of Duty: Mobile - Activision Support
    · Activision recognizes Coda and Carry1st purchasing relationships, directs unresolved purchase questions to the provider, and warns of regional limitations. ([support.activision.com](https://support.activision.com/cod-mobile/articles/cod-points-purchases-call-of-duty-mobile))
15. Game Purchase - Factorio
    · A Factorio website purchase upgrades the customer's account for direct downloads and permits Steam-key redemption. ([factorio.com](https://www.factorio.com/buy))
16. Sony Corporate Report 2025
    · Sony documents equipment and continuing subscription relationships, supporting account-level positioning rather than universal entitlement. ([sony.com](https://www.sony.com/en/SonyInfo/IR/library/corporatereport/CorporateReport2025_E.pdf))
17. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    · NetEase's fiscal 2025 results report Blizzard-title operations in China alongside its game portfolio. ([ir.netease.com](https://ir.netease.com/node/xx.xx))

18. Blacknut - The Cloud Gaming Experience
    - Blacknut describes a recurring subscription including its streaming library, unlike a service requiring separate ownership of applicable games.
    ([blacknut.com](https://www.blacknut.com/en/support/blacknut-cloud-gaming))
    - Evidence informing base-year company-share estimates: Blacknut describes a subscription-based streaming service supplying access to a game library.
    - Evidence informing base-year company-share estimates: This supports the included access-service boundary and excludes adding each library title's purchase price as a separate sale.
19. What Is Amazon Luna?
    - Amazon's Luna article distinguishes Prime-included access, additional gaming subscriptions, supported devices, and named eligible countries.
    ([aboutamazon.com](https://www.aboutamazon.com/news/entertainment/what-is-amazon-luna))
20. AppLovin Corporation Form 10-K - Year Ended December 31, 2025
    - Evidence informing base-year company-share estimates: The mandatory 2025 filing supplies USD xx.xx continuing advertising revenue, USD xx.xx discontinued Apps revenue and USD xx.xx comparative 2024 Apps revenue. These constrain the retained-receipt and ownership-period model, not an observed final share.
    - Evidence informing base-year company-share estimates: The seller's annual Apps amounts provide the comparable-scale and pre-acquisition-period anchors for the modeled Tripledot legacy and acquired activity. Second-half continuation and category mixes remain assumptions.
21. AppLovin Completes Sale of Mobile Gaming Business to Tripledot Studios
    - Evidence informing base-year company-share estimates: The official completion announcement records June xx.xx 2025 closing and identifies the transferred studios, constraining pre-sale rather than full-year attribution.
    - Evidence informing base-year company-share estimates: The completed acquisition establishes the post-June-xx.xx operating perimeter; acquisition consideration and minority investor holdings are not gaming revenue.
22. Tripledot Studios - Announcement of AppLovin Games Portfolio Acquisition
    - Evidence informing base-year company-share estimates: Tripledot's company-authored announcement identifies nearly USD xx.xx combined annual gross revenue and xx.xx daily users after closing. It constrains scale but is not realized calendar-2025 revenue.
23. Coffee Stain Group AB - Interim Report October-December 2025
    - Evidence informing base-year company-share estimates: The independently inspected product table supports calendar reconstruction of SEK xx.xx PC/console and SEK xx.xx Other-platform receipts, with Roblox/mobile identified within Other.
24. Federal Reserve - Foreign Exchange Rates, G.5A, January 5, 2026
    - Evidence informing base-year company-share estimates: The official 2025 annual-average SEK xx.xx per USD rate supplies the currency bridge for the modeled calendar retained-receipt numerator.
25. Roblox Corporation Form 10-K - Year Ended December 31, 2025
    - Evidence informing base-year company-share estimates: The filing supplies USD xx.xx annual creator compensation and xx.xx engagement hours for the explicitly modeled creator-consideration-per-hour calibration; it does not observe Uplift's receipts.
    - Evidence informing base-year company-share estimates: Annual platform creator compensation and engagement constrain the retained creator pool allocated to Voldex's modeled ownership-period hours.
    - Evidence informing base-year company-share estimates: Annual platform creator compensation and engagement calibrate the creator component, separately from assumed direct campaign consideration.
    - Evidence informing base-year company-share estimates: Provides bookings, cost/deferred-cost inputs, creator expense and gross-principal accounting; supports the modeled distribution/creator deduction and limits inference about advertising adoption.
    ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/rblx-xx.xx.htm))

26. Developers Behind Adopt Me Launch Uplift Games
    - Evidence informing base-year company-share estimates: The May xx.xx 2021 company release reports more than xx.xx monthly Adopt Me players and predecessor continuity. The 2025 activity reduction and engagement assumptions are modeled rather than source observations.
27. Voldex Acquires Brookhaven
    - Evidence informing base-year company-share estimates: Voldex's acquisition release reports Brookhaven above xx.xx monthly players and the expanded portfolio above xx.xx, constraining the activity and ownership-period model without establishing paid purchasing or retained receipts.
28. Gamefam Year in Review 2025
    - Evidence informing base-year company-share estimates: Gamefam's own 2025 retrospective reports xx.xx average monthly hours, xx.xx daily sessions and more than xx.xx campaigns/games. It constrains activity and role distinctions, not the assumed campaign prices or qualifying placement fraction.
29. Microsoft 2025 Annual Report
    - Evidence informing base-year company-share estimates: Reports FY2025 Gaming revenue of USD23.xx.xx and identifies hardware, content, subscriptions, advertising and other gaming cloud services. This is a fiscal-year calibration anchor, not an observed calendar-year attributable numerator.
30. Microsoft Fiscal Year 2025 Fourth Quarter Earnings Conference Call
    - Evidence informing base-year company-share estimates: Discloses nearly USD5 billion annual Game Pass revenue, constraining the subscription block used for modeled third-party content attribution.
31. Microsoft FY26 Q2 Earnings Release
    - Evidence informing base-year company-share estimates: Reports a xx.xx% year-over-year decline in Xbox content and services for the December-2025 quarter. This qualifies extrapolation of fiscal-year growth but does not directly establish the assumed xx.xx calendar bridge.
32. Sony FY25.3Q Supplemental Information
    - Evidence informing base-year company-share estimates: Quarterly category rows permit reconstruction of calendar hardware, physical/digital software, add-ons, network services and other sales; first-party and total software units constrain the modeled value mix.
    - Evidence informing base-year company-share estimates: External-customer and segment totals support an intersegment elimination. The Music-category presentation also establishes a business perimeter beyond G&NS, without measuring the modeled game-app supplement.
33. Nintendo Financial Results Explanatory Material - Fiscal Year Ended March 2025
    - Evidence informing base-year company-share estimates: Provides FY2025 dedicated-platform revenue of JPY1083534 million, quarterly hardware proportions and the distinction between platform sales and mixed mobile/IP/merchandise categories.
34. Nintendo Financial Results Explanatory Material - Nine Months Ended December 31, 2025
    - Evidence informing base-year company-share estimates: Provides April-December 2025 and comparative dedicated-platform sales, hardware proportions, Switch xx.xx shipments and the gross-first-party/net-third-party digital-sales accounting distinction.
35. Tencent Announces 2025 Annual and Fourth Quarter Results
    - Evidence informing base-year company-share estimates: Tencent's own release reports RMB164.xx.xx Domestic Games and RMB77.xx.xx International Games revenue for 2025, identifies app-based game sales within Social Networks and reports xx.xx Weixin/WeChat monthly users.
    - Evidence informing base-year company-share estimates: These observations constrain the main gaming numerator and reachable audience, not the assumed payer, fee, royalty or advertising parameters.
36. Ubisoft annonce la finalisation de l'investissement stratégique de Tencent dans Vantage Studios
    - Evidence informing base-year company-share estimates: The completed minority investment does not establish Tencent control or consolidation of Vantage Studios; Ubisoft operating sales are therefore not added proportionally to Tencent.
    - Evidence informing base-year company-share estimates: Confirms completion of Tencent's Vantage investment while Ubisoft retains exclusive control and consolidation, supporting preservation of the Ubisoft operating perimeter.

37. NetEase, Inc. Form 20-F - Year Ended December 31, 2025
    - Evidence informing base-year company-share estimates: Reports approximately RMB78.xx.xx in-house and RMB10.xx.xx licensed-game revenue in 2025, licensed-game growth and platform/royalty cost categories.
    - Evidence informing base-year company-share estimates: Supports separation of owned development from licensed territorial operation; it does not disclose the modeled contractual retention percentages.
38. Electronic Arts Reports Q3 FY26 Results
    - Evidence informing base-year company-share estimates: Reports calendar-2025 trailing-twelve-month revenue of USD7.xx.xx and bookings of USD7.xx.xx, plus quarterly mobile revenue and deferred-revenue adjustments used in the purchasing bridge.
39. Electronic Arts Inc. Form 10-Q - Quarter Ended December 31, 2025
    - Evidence informing base-year company-share estimates: Explains net third-party console/PC storefront accounting versus gross specified mobile-store accounting and discloses nine-month cost-of-revenue inputs.
    - Evidence informing base-year company-share estimates: Identifies royalty, mobile-platform, hosting and other cost categories, supporting a bounded rights-cost attribution rather than treating all costs as external rights.
40. Electronic Arts Inc. Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year company-share estimates: Reports FY2025 cost of revenue of USD1.xx.xx and describes external royalty obligations, supplying the annual component of the calendar cost bridge.
41. Take-Two Interactive Software, Inc. Reports Results for Fiscal Third Quarter 2026
    - Evidence informing base-year company-share estimates: Reports April-December 2025 bookings of USD5.xx.xx, comparative revenue, a xx.xx% mobile bookings mix and USD343.xx.xx of license costs.
    - Evidence informing base-year company-share estimates: Defines bookings broadly enough to require a nonqualifying consideration allowance and supports distinguishing license costs from internal royalties.
42. Take-Two Interactive Software, Inc. Form 10-K - Fiscal Year Ended March 31, 2025
    - Evidence informing base-year company-share estimates: Provides the FY2025 revenue anchor and discloses net console/PC versus gross specified mobile-store accounting, with xx.xx% of fiscal-year mobile revenue through Apple/Google.
    - Evidence informing base-year company-share estimates: Identifies the consolidated publishing perimeter; these facts do not establish the assumed calendar mobile mix or effective fee.
43. Ubisoft Reports Third-Quarter 2025-26 Sales
    - Evidence informing base-year company-share estimates: Reports April-December 2025 bookings of EUR1110.xx.xx, supplying the nine-month component of the calendar-2025 numerator.
44. Ubisoft Reports Full-Year 2025-26 Earnings Figures
    - Evidence informing base-year company-share estimates: Retains comparative January-March 2025 bookings of EUR902.xx.xx while presenting restated IFRS sales, supporting the selected calendar bookings bridge without using superseded sales.
45. Microsoft / Activision Blizzard (ex-cloud streaming rights) merger inquiry
    - Evidence informing base-year company-share estimates: Documents Ubisoft's commercializable Activision cloud-streaming rights, territorial distinctions and compensation payable to Microsoft. This establishes an attribution relationship, not realized 2025 licensing revenue.
    - Evidence informing base-year company-share estimates: Establishes that Activision ownership does not eliminate separately held Ubisoft cloud rights and associated wholesale consideration, supporting the need for cross-company rights-payment deductions.
46. Bandai Namco Holdings - FY2026.3 Third Quarter Financial Highlights
    - Evidence informing base-year company-share estimates: Provides fiscal-year and nine-month network-content revenue, home-console revenue and game units used in the calendar-2025 bridge; final-buyer realization and royalty exclusions remain modeled. ([bandainamco.co.jp](https://www.bandainamco.co.jp/files/ir/financialstatements/en_20260205_Complement.pdf))

47. SEGA SAMMY HOLDINGS - FY2026/3 Third Quarter Results Presentation
    · Evidence informing base-year company-share estimates: Supplies Consumer, Full Game and F2P revenue for the fiscal/calendar bridge and identifies Rovio, character licensing, DLC and subscription receipts; it does not disclose the final modeled scope or retail factors. ([segasammy.co.jp](https://www.segasammy.co.jp/cms/wp-content/uploads/pdf/en/ir/20260213_q3_presentation_e.pdf))
48. SQUARE ENIX HOLDINGS CO., LTD. - Annual Report 2025
    · Evidence informing base-year company-share estimates: Reports fiscal-year-ended-March-2025 Digital Entertainment net sales of JPY xx.xx, an input to calendar-2025 external revenue. ([hd.square-enix.com](https://www.hd.square-enix.com/eng/ir/library/pdf/ar_2025en.pdf))
49. Square Enix - Consolidated Financial Results for the Nine-Month Period Ended December 31, 2025
    · Evidence informing base-year company-share estimates: Reports Digital Entertainment external sales of JPY xx.xx for April-December 2025 and JPY xx.xx for the comparative period. ([hd.square-enix.com](https://www.hd.square-enix.com/eng/ir/news/pdf/26q3earnings.pdf))
50. Square Enix - Results Briefing Session for the Fiscal Year Ended March 31, 2025
    · Evidence informing base-year company-share estimates: Provides the fiscal-year HD Games and MMO revenue anchors and the rounded Digital Entertainment total used to construct subsegment calendar weights. ([hd.square-enix.com](https://www.hd.square-enix.com/eng/ir/library/pdf/25q4slides.pdf))
51. Square Enix - Results Briefing Session for the Nine-Month Period Ended December 31, 2025
    · Evidence informing base-year company-share estimates: Provides comparative HD Games, MMO and smart-device/browser receipts, and identifies a DeNA-published relationship; these constrain rather than verify the modeled channel and royalty adjustments. ([hd.square-enix.com](https://www.hd.square-enix.com/eng/news/pdf/26q3slides.pdf))
52. FINAL FANTASY XIV Product Page
    · Evidence informing base-year company-share estimates: Separates product eligibility, continuing subscriptions and expansions, and states that PlayStation Plus is unnecessary; supports the attribution boundary, not the 2025 revenue estimate. ([na.finalfantasyxiv.com](https://na.finalfantasyxiv.com/product/))
53. CAPCOM - Earnings Supplement
    · Evidence informing base-year company-share estimates: Historical fiscal-year tables separate Consumer, Mobile Contents, platform digital licensing and deferred revenue, providing the fiscal-year inputs and the licensing exclusion. ([capcom.co.jp](https://www.capcom.co.jp/ir/english/data/pdf/explanation/2025/full/explanation_2025_full_01.pdf))
54. CAPCOM - Q3 FY2025 Financial Results Presentation
    · Evidence informing base-year company-share estimates: Provides current and comparative nine-month Consumer, Mobile Contents, digital-license and deferred-revenue observations used in the calendar bridge. ([capcom.co.jp](https://www.capcom.co.jp/ir/english/data/pdf/explanation/2025/3rd/explanation_2025_3rd_01.pdf))
55. KONAMI GROUP CORPORATION - Consolidated Financial Results for the Nine Months Ended December 31, 2025
    · Evidence informing base-year company-share estimates: Reports nine-month external Digital Entertainment revenue and identifies physical card games within the segment; supports the observed partial-year anchor and the need for a scope exclusion, not its assumed magnitude. ([img.konami.com](https://img.konami.com/ir/en/ir-data/statements/2026/en0129_cf84s6.pdf))
56. NEXON Co., Ltd. - Notice of the 24th Annual General Meeting of Shareholders and FY2025 Financial Statements
    · Evidence informing base-year company-share estimates: Audited calendar-2025 statements provide total, PC, mobile, Other and customer-location revenue, alongside licensing and principal/agent policies; these support the numerator anchors but not the assumed attribution fractions. ([nexon.co.jp](https://www.nexon.co.jp/en/ir/uploads/ad3f8641565c3a3c2f7012d6b3e2de6a26ee2f73.pdf))

57. KRAFTON、2025 年の売上高 3 兆 3,266 億ウォンを達成

· Evidence informing base-year company-share estimates: KRAFTON JAPAN's company-authored release supplies 2025 PC, mobile, console and Other revenue, identifies ADK and Neptune consolidation, and reports BGMI payer growth; the controlled-consumer fraction remains modeled. ([prtimes.jp](https://prtimes.jp/main/html/rd/p/xx.xx.html))

58. Netmarble - 4Q 2025 & FY 2025 Earnings Results

· Evidence informing base-year company-share estimates: Reports 2025 revenue of KRW xx.xx, operating game portfolios and separately expensed commissions; supports the annual anchor and gross-accounting hypothesis, not an observed final share. ([sgimage.netmarble.com](https://sgimage.netmarble.com/images/netmarble/nmOfficial/xx.xx/8sto1770273390151.pdf))

59. NCSOFT Announces Annual Financial Results for 2025

· Evidence informing base-year company-share estimates: Reports calendar-2025 mobile, PC and royalty revenue and distinguishes continuing operations from subsequent launches; supports game-specific numerator scope, not the final modeled share. ([about.ncsoft.com](https://about.ncsoft.com/en/news/article/news_update_260210_2))

60. NCSOFT Q4 2025 Earnings Release

· Evidence informing base-year company-share estimates: Provides exact title-chart and royalty inputs and the AION xx.xx gross-billings versus recognized-revenue difference used in the calendar purchasing bridge. ([irsvc.teletogether.com](https://irsvc.teletogether.com/ncsoft/pdf/ncsoft2025Q4_eng.pdf))

61. Pearl Abyss 4Q25 Earnings Presentation

· Evidence informing base-year company-share estimates: Reports 2025 annual operating revenue, quarterly Black Desert/EVE receipts and platform mix; constrains the retained gaming-receipts model while leaving fees and miscellaneous-revenue attribution assumed. ([kind.krx.co.kr](https://kind.krx.co.kr/external/dst/irReference/xx.xx/2025.4Q%20Earnings%20Release_Final.pdf))

62. Sea Limited Reports Fourth Quarter and Full Year 2025 Results

· Evidence informing base-year company-share estimates: Defines Garena bookings as revenue plus the deferred-revenue change and an approximation of current user spending; prevents addition of bookings and recognized revenue. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/d106475dex991.htm))

63. Sea Limited Form 20-F - Fiscal Year Ended December 31, 2025

· Evidence informing base-year company-share estimates: Provides quarterly Garena bookings, annual gaming revenue and cost of revenue, including discussion of payment-channel and royalty costs; supports the modeled retained-consideration bridge. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ef20067274_20f.htm))

64. Steam Year In Review 2025

· Evidence informing base-year company-share estimates: Valve discloses a xx.xx% publisher revenue share for non-Valve games in 2025 and no Valve fees on externally sold free Steam keys; supports retained distribution attribution, not a gross Steam spending observation. ([steamcommunity.com](https://steamcommunity.com/groups/steamworks/announcements/detail/xx.xx))

65. About Us - Valve Corporation

· Evidence informing base-year company-share estimates: Identifies Valve's game, Steam and hardware businesses, supporting separate content/distribution/equipment modeling rather than attribution of all storefront purchases to Valve. ([valvesoftware.com](https://www.valvesoftware.com/en/about))

66. Epic Games Store 2025 Year in Review

· Evidence informing base-year company-share estimates: Reports USD xx.xx total PC-store purchasing and USD xx.xx third-party purchasing, yielding the USD xx.xx first-party PC calibration anchor. ([store.epicgames.com](https://store.epicgames.com/en-US/news/epic-games-store-2025-year-in-review))

67. Download Epic Games for iOS & iPhone - Epic Games Store

· Evidence informing base-year company-share estimates: Documents region/device-specific mobile access; availability is not used as a quantitative observation of 2025 mobile purchasing. ([store.epicgames.com](https://store.epicgames.com/mobile/ios))

68. Scopely Completes Acquisition of Niantic's Games Business - Savvy Games Group

· Evidence informing base-year company-share estimates: Establishes Scopely's wholly owned relationship and the May xx.xx 2025 Niantic-games closing date; constrains post-control attribution rather than treating acquisition consideration as revenue. ([savvygames.com](https://www.savvygames.com/news/scopely-completes-acquisition-of-niantic-games-business))

69. Hasbro Annual Report 2025

· Evidence informing base-year company-share estimates: Reports MONOPOLY GO! licensing receipts used as the monetary anchor for a royalty-to-game-purchasing proxy; the assumed effective royalty rate is not supplied by the filing. ([corp.hasbro.com](https://corp.hasbro.com/static-files/c4bcc95c-xx.xx-498d-bf3c-5b21d6eb099a))

70. Scopely to Acquire Niantic Games Business

· Evidence informing base-year company-share estimates: Discloses the acquired Niantic games business's greater-than-USD-xx.xx-billion 2024 revenue; supports a prior-year scale anchor, not exact 2025 post-acquisition sales. ([scopely.com](https://www.scopely.com/en/news/scopely-to-acquire-niantic-games-business-which-includes-pokemon-go-one-of-the-most-successful-mobile-games-of-all-time))

71. Savvy Games Group Annual Report 2024

· Evidence informing base-year company-share estimates: Identifies controlled business units, minority investments and FACEIT premium-play services; supports perimeter exclusions and the existence, but not the volume, of modeled playable-service activity. ([assets.ctfassets.net](https://assets.ctfassets.net/igpjvr7gd13m/3sszfWGsgsTX2mbanUo9No/0a56919b8ba985cb37cfcfddf0ba6613/Savvy_Annual_Report_2024.pdf))

72. 2025 marked a record-breaking year for Apple services

· Evidence informing base-year company-share estimates: Apple reports cumulative developer earnings exceeding USD xx.xx through 2025; this anchors the inherited payout model, not an observed annual gaming numerator. ([apple.com](https://www.apple.com/newsroom/2026/xx.xx/2025-marked-a-record-breaking-year-for-apple-services/))

· Evidence informing base-year company-share estimates: The cumulative payout disclosure underlies the inherited iOS commerce calibration used in the Google Play comparison; it does not directly measure Google sales. ([apple.com](https://www.apple.com/newsroom/2026/xx.xx/2025-marked-a-record-breaking-year-for-apple-services/))

73. Apple celebrates a groundbreaking year in entertainment

· Evidence informing base-year company-share estimates: The cumulative developer-earnings threshold exceeding USD xx.xx through 2022 supplies the earlier endpoint of the payout calibration. ([apple.com](https://www.apple.com/newsroom/2023/xx.xx/apple-celebrates-a-groundbreaking-year-in-entertainment/))

74. App Store Small Business Program

· Evidence informing base-year company-share estimates: Reduced commissions for eligible developers constrain the assumed blended retention rate; the program does not establish a global effective gaming rate. ([developer.apple.com](https://developer.apple.com/app-store/small-business-program/))

75. Apple Arcade

· Evidence informing base-year company-share estimates: Arcade establishes a distinct game-library subscription and family-sharing relationship; it provides no observed annual subscriber or revenue total. ([apple.com](https://www.apple.com/apple-arcade/))

76. Service fees - Play Console Help

· Evidence informing base-year company-share estimates: Published xx.xx% and xx.xx% arrangements and explicitly dated later changes constrain the modeled fee blend without applying 2026 changes retrospectively. ([support.google.com](https://support.google.com/googleplay/android-developer/answer/xx.xx?hl=en))

77. Alphabet Inc. Form 10-K - Year Ended December 31, 2025

· Evidence informing base-year company-share estimates: Alphabet reports 2025 Google Network revenue of USD xx.xx, versus USD xx.xx in 2024; the model isolates a gaming-advertising portion rather than counting the entire line. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/goog-xx.xx.htm))

78. PTX0904: Google presentation (December 20, 2019)
    - Evidence informing base-year company-share estimates: The public internal presentation reports 2018 EMEA app-inventory revenue of USD xx.xx and approximately USD xx.xx total network revenue, supporting the historical app-mix calibration. ([justice.gov](https://www.justice.gov/atr/media/xx.xx/dl))
79. Grow with Google Play Pass
    - Evidence informing base-year company-share estimates: Play Pass includes both apps and games and compensates participating developers; this supports a gaming-scope and payout adjustment rather than attributing all subscription activity to Gaming. ([google.play](https://google.play/business/programs/googleplaypass/))
80. Microsoft and NVIDIA Announce Expansive New Gaming Deal
    - Evidence informing base-year company-share estimates: NVIDIA disclosed more than xx.xx GeForce NOW members in February 2023; the model treats them as registered members, not paid subscribers. ([nvidianews.nvidia.com](https://nvidianews.nvidia.com/news/microsoft-and-nvidia-announce-expansive-new-gaming-deal))
81. Pentanet Limited - Interim Results Announcement, H1 FY25
    - Evidence informing base-year company-share estimates: Pentanet reports approximately AUD xx.xx half-year Gaming revenue and more than xx.xx CloudGG members, providing an independent registration-versus-monetization comparison. ([announcements.asx.com.au](https://announcements.asx.com.au/asxpdf/xx.xx/pdf/06fy9fbwffkg91.pdf))
82. Meta Platforms, Inc. Form 10-K - Year Ended December 31, 2025
    - Evidence informing base-year company-share estimates: Meta reports USD xx.xx Reality Labs revenue in 2025 and identifies AI-glasses growth alongside lower Quest sales, requiring a gaming-specific scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/meta-xx.xx.htm))
83. Facebook Responses to House Judiciary Committee Questions - October 11, 2019
    - Evidence informing base-year company-share estimates: Facebook's congressional response reports more than USD xx.xx Audience Network publisher/developer payouts in 2018 and net recognition of the retained remainder; the 2025 bridge remains modeled. ([congress.gov](https://www.congress.gov/xx.xx/meeting/house/xx.xx/documents/HHRG-xx.xx-JU05-xx.xx-SD039.pdf))
84. Playtika Holding Corp. Form 10-K - Year Ended December 31, 2025
    - Evidence informing base-year company-share estimates: Playtika disaggregates third-party and direct-platform revenue and describes gross game-revenue accounting, platform costs and the dated Washington litigation, supporting the retained-receipts and access-risk adjustments. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/playtika-xx.xx.htm))
    - Evidence informing base-year company-share estimates: Provides 2025 comparator metrics of xx.xx DAUs, xx.xx MAUs and USD xx.xx ARPDAU. Wildlife-specific engagement and monetization discounts remain assumptions, not observed transfer coefficients. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/playtika-xx.xx.htm))
85. Playtika Holding Corp. Reports Q4 and 2025 Financial Results
    - Evidence informing base-year company-share estimates: Reported 2025 revenue of USD xx.xx and DTC revenue of USD xx.xx anchor the publisher retained-receipts calculation. ([investors.playtika.com](https://investors.playtika.com/news-releases/news-release-details/playtika-holding-corp-reports-q4-and-2025-financial-results))
    - Evidence informing base-year company-share estimates: Playtika's xx.xx average MAUs and reported revenue provide a monetization comparator; they do not directly establish Playrix's audience or receipts. ([investors.playtika.com](https://investors.playtika.com/news-releases/news-release-details/playtika-holding-corp-reports-q4-and-2025-financial-results))
86. Playrix Press Kit - English
    - Evidence informing base-year company-share estimates: Playrix's own press kit reports more than xx.xx monthly players and over two billion cumulative downloads; only its own operating disclosures, not externally sourced rankings, are used. ([playrix.com](https://playrix.com/upload/iblock/xx.xx/gtc4n43jk9teo0v9jx4n53mnvaphut40.pdf))

87. PLAYSTUDIOS, Inc. Announces Fourth Quarter and Full Year 2025 Financial Results
    · Evidence informing base-year company-share estimates: PLAYSTUDIOS reports 2025 revenue of USD xx.xx, xx.xx average MAUs and USD xx.xx DTC revenue, supplying a lower-monetization counter-comparator for Playrix.
    ([d1io3yog0oux5.cloudfront.net](https://d1io3yog0oux5.cloudfront.net/_d874e5014b8bdf1c338724fea7ddbb27/playstudios/news/2026-xx.xx-16_PLAYSTUDIOS_Inc_Announces_Fourth_Quarter_and_Full__98.pdf))
88. CMA Mobile Ecosystems Market Study - Appendix B: Market Outcomes
    · Evidence informing base-year company-share estimates: The CMA's analysis of company-supplied UK data distinguishes consumer billings from Apple-retained amounts and identifies games as a major revenue category; it is a dated accounting and mix check, not a global 2025 share.
    ([assets.publishing.service.gov.uk](https://assets.publishing.service.gov.uk/media/62a20facd3bf7f036ddfe89e/Appendix_B_-_Market_outcomes.pdf))
89. CVC 2025 Half-Year Results Presentation
    · Evidence informing base-year company-share estimates: The investment presentation identifies xx.xx annual Royal Match players and revenue exceeding USD xx.xx without a specified revenue period or gross/net basis; the audience supports a modeled purchasing bridge, not an observed 2025 share.
90. Terms of Service - Dream Games
    · Evidence informing base-year company-share estimates: Dream Games' terms establish optional virtual-item purchasing as a commercial model; they do not disclose annual payer conversion or expenditure.
91. Modern Times Group MTG AB - Q4 2025 Year-End Report
    · Evidence informing base-year company-share estimates: MTG reports SEK xx.xx 2025 sales, partial-year acquired operations, February xx.xx Plarium closing and xx.xx% organic growth versus xx.xx% reported growth; these constrain the consolidated gaming-receipts estimate.
92. Stillfront Group Annual Report 2025
    · Evidence informing base-year company-share estimates: The annual report supplies bookings, subscription/virtual-good, advertising and reseller amounts and distinguishes gross principal receipts from agent arrangements; these support the payment-timing and non-overlap model.
93. Consolidated Financial Statements of the CD PROJEKT Group for 2025
    · Evidence informing base-year company-share estimates: The statements disclose PLN xx.xx digital and PLN xx.xx boxed game revenue, separately identify other revenue, and present GOG as discontinued following its December xx.xx disposal.
    · Evidence informing base-year company-share estimates: The observed approximately xx.xx% boxed share of this comparable publisher's game receipts informs, but does not verify, Embracer's modeled xx.xx/xx.xx digital/physical mix.
94. Embracer Group - Interim Report Q3, October-December 2025
    · Evidence informing base-year company-share estimates: April-December 2025 continuing operations report PC/console sales of SEK xx.xx and mobile sales of SEK xx.xx, excluding Coffee Stain after discontinued-operation restatement.
95. Embracer Group - Interim Report Q4, January-March 2026
    · Evidence informing base-year company-share estimates: Restated January-March 2025 comparatives provide SEK xx.xx PC/console and SEK xx.xx mobile sales, completing the calendar-2025 segment bridge on the continuing perimeter.
96. Paradox Interactive Annual Report 2025
    · Evidence informing base-year company-share estimates: The report discloses 2025 revenue by PC, console, mobile and other categories, substantial Steam receipts, and recognition based on distribution-platform consideration, supporting differentiated buyer-expenditure gross-ups.

97. Federal Reserve - Foreign Exchange Rates, G.5A, January 5, 2026
    - Evidence informing base-year company-share estimates: The official 2025 annual average of SEK xx.xx per USD supplies the currency bridge, not the commercial attribution assumptions.
    - Evidence informing base-year company-share estimates: The official 2025 average SEK/USD rate translates the modeled bookings and advertising expenditure numerator.
    - Evidence informing base-year company-share estimates: The official 2025 average SEK/USD rate translates the calendar-year, scope-adjusted gaming numerator.
    - Evidence informing base-year company-share estimates: The official 2025 average SEK/USD rate translates platform-adjusted publisher receipts.
98. Hasbro, Inc. Form 10-K - Year Ended December 28, 2025
    - Evidence informing base-year company-share estimates: Reports USD xx.xx Tabletop Gaming revenue, USD xx.xx Digital and Licensed Gaming revenue and USD xx.xx MONOPOLY GO! contribution. These constrain the product residual and demonstrate why mixed licensing revenue cannot be counted as independent consumer purchasing.
99. Let's Bail!: The evolution of individual-group affiliation in an online gaming community
    - Evidence informing base-year company-share estimates: Publisher-supplied North American World of Tanks data contain xx.xx monthly observations for xx.xx players over xx.xx months during September 2016-April 2019. This supports a historical activity anchor only, not observed 2025 revenue.
100. World of Tanks Blitz Reforged Update Arriving, Powered by Unreal Engine 5
    - Evidence informing base-year company-share estimates: The January xx.xx 2025 announcement reports more than xx.xx cumulative World of Tanks Blitz players. Annual activity, payer conversion and retained-territory attribution are modeled separately.
101. Wargaming announces decision to leave Russia and Belarus
    - Evidence informing base-year company-share estimates: Wargaming states that its transferred Russia/Belarus live-games operation is operated by unaffiliated Lesta management and that Wargaming would not profit from the transfer. This supports exclusion of that operation rather than use of an unchanged historical group perimeter.
102. War Thunder is celebrating its 10th Anniversary
    - Evidence informing base-year company-share estimates: The tenth-anniversary disclosure reports War Thunder concurrency regularly exceeding xx.xx and more than xx.xx registered players. The model uses concurrency as a historical activity primitive, not annual sales.
103. How progression and economy is built in F2P games and War Thunder in particular
    - Evidence informing base-year company-share estimates: The May xx.xx 2023 company disclosure says about xx.xx% of players had never paid and some payers did not purchase every year. It constrains, but does not directly measure, annual payer conversion.
104. Gaijin Entertainment
    - Evidence informing base-year company-share estimates: Gaijin identifies War Thunder as its main project and describes a portfolio exceeding xx.xx games across PC, consoles and mobile. This establishes commercial categories for the supplemental model, not the assumed annual cohorts.
105. State of Survival Celebrates 3 Year Anniversary and Passes 150 Million Downloads
    - Evidence informing base-year company-share estimates: FunPlus reports xx.xx cumulative State of Survival downloads at its third anniversary. The estimate explicitly separates this historical stock from modeled current activity and purchasing.
106. FunPlus 2025 Wrapped Video!
    - Evidence informing base-year company-share estimates: The official 2025 review identifies global launches of DC: Dark Legion, Tiles Survive and Foundation: Galactic Frontier and lists the continuing game portfolio. It supports inclusion and partial-year treatment, not reported launch revenues.
107. FunPlus' Tiles Survive! Celebrates 20 Million Player Downloads
    - Evidence informing base-year company-share estimates: FunPlus reports xx.xx Tiles Survive downloads less than a year after its July 2025 launch. This is a subsequent first-year reach anchor; the xx.xx% calendar-2025 allocation is an assumption, not a disclosed count.

108. 2025: a year of growth and transformation for Voodoo

· Evidence informing base-year company-share estimates: Voodoo reports USD xx.xx 2025 revenue and USD xx.xx casual-game revenue representing xx.xx% of its gaming business. The gaming-only derivation excludes social applications; monetization mix and advertising valuation adjustments remain modeled.

109. About Behaviour Interactive

· Evidence informing base-year company-share estimates: Behaviour's company history reports more than xx.xx Dead by Daylight players in 2022 and separately describes third-party client development. These support a historical audience anchor and exclusion of production-service activity, not observed 2025 consumer revenue.

110. CyberAgent FY2026 Q1 Results Presentation

· Evidence informing base-year company-share estimates: The Game Business quarterly-sales chart supplies rounded JPY xx.xx, xx.xx, xx.xx and xx.xx calendar-2025 quarters. Their JPY xx.xx sum is the financial anchor; scope exclusions, channel retention and final-buyer conversion are assumptions.

111. Razer Inc. Annual Report 2021

· Evidence informing base-year company-share estimates: Razer's 2021 mandatory filing reports peripheral revenue of USD xx.xx separately from systems and software/services. This supplies a scope-specific historical anchor; the 2025 activity, qualifying-product and retail bridges are modeled.

112. Corsair Reports Strong Revenue and Profit Growth for 4Q25 and FY25

· Evidence informing base-year company-share estimates: Reports 2025 Gamer and Creator Peripherals revenue of USD xx.xx and Gaming Components and Systems revenue of USD xx.xx, constraining the included-product numerator.

· Evidence informing base-year company-share estimates: Identifies creator/broadcast expansion and Fanatec activity; the gaming-product and channel fractions remain modeled. ([ir.corsair.com](https://ir.corsair.com/news-releases/news-release-details/corsair-reports-strong-revenue-and-profit-growth-4q25-and-fy25/))

113. Logitech International S.A. Form 10-Q - Quarter Presented as Ended December 31, 2025

· Evidence informing base-year company-share estimates: Reports USD xx.xx Gaming revenue for the nine months presented as ending December xx.xx 2025, and includes Streamlabs services in that category.

· Evidence informing base-year company-share estimates: Documents fiscal-quarter timing and category scope; does not observe the modeled exclusion or retail margin. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/logi-xx.xx.htm))

114. Logitech Announces Q4 and Full Fiscal Year 2026 Results

· Evidence informing base-year company-share estimates: Comparative supplemental information reports USD xx.xx Gaming revenue for January-March 2025, completing the calendar-aligned revenue bridge. ([news.logitech.com](https://news.logitech.com/press-releases/news-details/2026/Logitech-Announces-Q4-and-Full-Fiscal-Year-2026-Results/default.aspx))

115. Unity Software Inc. Form 10-K - Year Ended December 31, 2025

· Evidence informing base-year company-share estimates: Reports 2025 Grow Solutions revenue of USD xx.xx and distinguishes net advertising-intermediation accounting from gross controlled-publisher advertising.

· Evidence informing base-year company-share estimates: Provides a fourth-quarter xx.xx% combined named-ad-network revenue calibration and identifies publishing activity; annual inventory, take-rate and scope parameters remain assumed. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/unity-xx.xx.htm))

116. Nazara Technologies Limited - Q3 and 9M FY2026 Earnings Conference Call Transcript, February 4, 2026

· Evidence informing base-year company-share estimates: Reports April-December 2025 core Gaming revenue of INR xx.xx crore and mobile revenue of INR xx.xx crore, anchoring the calendar-year attribution. ([nsearchives.nseindia.com](https://nsearchives.nseindia.com/corporate/NAZARA_10022026104251_IntimationofTranscript.pdf))

117. Nazara Technologies Limited - Earnings Conference Call Transcript, May 13, 2026

· Evidence informing base-year company-share estimates: Fiscal-2026 Gaming, mobile and PC-console revenue and January-March Gaming growth constrain the modeled calendar bridge and nonmobile operating mix; these fiscal observations are not copied as calendar-2025 totals. ([investors.nazara.com](https://investors.nazara.com/content/pdfs/announcements/xx.xx-earning-call-transcript-may-xx.xx-2026.pdf))

118. Nazara Technologies Limited - 26th Annual Report 2024-2025

· Evidence informing base-year company-share estimates: Identifies App Store and Google Play commissions as expenses and describes principal-versus-agent assessment, supporting avoidance of a second mobile platform-fee gross-up. ([investors.nazara.com](https://investors.nazara.com/content/pdfs/financials/68bc10bdc953599b2c99e1d8_nazaraannualreport.pdf))

119. Wildlife Raises US$120 Million Series B to Become the Platform for the Best Game Developers

· Evidence informing base-year company-share estimates: The 2020 announcement reports more than xx.xx monthly active users and named commercial titles. This is a dated audience anchor, not observed 2025 revenue or users. ([newsroom.wildlifestudios.com](https://newsroom.wildlifestudios.com/news/wildlife-raises-us120-million-series-b-financing-as-it-aims-to-become-the-platform-for-the-worlds-best-game-developers/))

120. The Bobbie Goods Effect: Wildlife's Coloring Games Reach 1 Million Monthly Users

· Evidence informing base-year company-share estimates: The dated 2025 company article identifies a one-million-monthly-user coloring portfolio, supporting continuing activity without validating a company-wide audience estimate. ([newsroom.wildlifestudios.com](https://newsroom.wildlifestudios.com/news/efeito-bobbie-goods-jogos-de-colorir-da-wildlife-alcancam-xx.xx-milhao-de-usuarios-mensais/))

121. Warner Bros. Discovery, Inc. Form 10-K - Year Ended December 31, 2025

· Evidence informing base-year company-share estimates: Reports a xx.xx% ex-FX decrease in 2025 games revenue due to lower carryover and fewer releases, providing counterevidence to an unqualified franchise-growth assumption, not an absolute numerator. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/wbd-xx.xx.htm))

122. Warner Bros. Games - Hogwarts Legacy 40 Million Units Milestone

· Evidence informing base-year company-share estimates: The official publisher post states xx.xx cumulative Hogwarts Legacy units. It anchors franchise scale but does not establish annual purchasing, realized prices or the modeled eight-million-purchase cohort. ([linkedin.com](https://www.linkedin.com/posts/warnerbrosgames_hogwartslegacy-activity-xx.xx-JQVB))

123. 37 Interactive Entertainment Network Technology Group Co., Ltd. - 2025 Annual Report

· Evidence informing base-year company-share estimates: Provides 2025 self-operated and other-business revenue inputs and gross-principal versus revenue-sharing accounting for the modeled numerator. ([static.cninfo.com.cn](https://static.cninfo.com.cn/finalpage/2026-xx.xx-xx.xx/xx.xx.PDF))

124. Perfect World Co., Ltd. - 2025 Annual Report

· Evidence informing base-year company-share estimates: Provides gaming revenue, individual-customer receipts and game-related other-business revenue used in the conservative consumer-principal proxy. ([static.cninfo.com.cn](https://static.cninfo.com.cn/finalpage/2026-xx.xx-xx.xx/xx.xx.PDF))

125. XD Inc. - Annual Report 2025

· Evidence informing base-year company-share estimates: Provides game-operating revenue, separate TapTap marketing activity, principal accounting and opening/closing contract liabilities used in the purchasing bridge. ([www1.hkexnews.hk](https://www1.hkexnews.hk/listedco/listconews/sehk/2026/xx.xx/xx.xx.pdf))

126. Kingsoft Corporation Limited - Results for the Year Ended December 31, 2025

· Evidence informing base-year company-share estimates: Reports 2025 online-games-and-others revenue of CNY xx.xx separately from office software and services; the xx.xx% scope factor is modeled, not disclosed. ([hkexnews.hk](https://www.hkexnews.hk/listedco/listconews/sehk/2026/xx.xx/xx.xx.pdf))

127. Aristocrat Leisure Limited - Annual Report 2025
   - Evidence informing base-year company-share estimates: Provides Product Madness bookings, Plarium discontinued revenue and disposal timing, and subsequent Big Fish divestment context for the calendar-year attribution model. ([ir.aristocrat.com](https://ir.aristocrat.com/static-files/aef192b7-748c-4ec5-88a6-7cfdeda61e5f))
128. The Art of Mobile App Reputation Management - MobilityWare and Helpshift Webinar
   - Evidence informing base-year company-share estimates: The October xx.xx 2022 webinar featuring MobilityWare's customer-support manager reports xx.xx monthly players, used only as a historical audience anchor.
129. PLAYSTUDIOS, Inc. Announces Fourth Quarter and Full Year 2025 Results
   - Evidence informing base-year company-share estimates: 2025 playGAMES revenue, average MAU and management's casual audience/revenue proportions provide the company-specific comparable inputs for MobilityWare.
   - Evidence informing base-year company-share estimates: Virtual-currency and advertising revenue, together with other revenue and playAWARDS disclosures, anchor the final-buyer bridge.
   - Evidence informing base-year company-share estimates: Rewards' stated retail values are not treated as company revenue or additional Gaming purchases.
130. CFO Comment on the 2024 Accounting - Cloud Imperium Games
   - Evidence informing base-year company-share estimates: Reports 2024 net counter receipts of USD xx.xx and explains immediate playable access within most purchases.
   - Evidence informing base-year company-share estimates: Separates subscriptions and other income, including incentives and services, from counter receipts; the 2025 bridge remains modeled.
131. Stardew Valley - Press
   - Evidence informing base-year company-share estimates: Reports the December 2024 cumulative sales threshold, PC and Switch counts, regular price and ConcernedApe's publishing role; these support the modeled unit, platform-mix and pricing bridges, not an observed 2025 share.
132. Steam Community :: Stardew Valley - Stardew Valley 10-year Anniversary
   - Evidence informing base-year company-share estimates: The developer's February xx.xx 2026 anniversary announcement reports more than xx.xx cumulative copies; the calendar-2025 portion of the threshold difference remains modeled.
133. tinyBuild, Inc. - FY 2025 results ahead of expectations, issuer regulatory announcement, March 19, 2026
   - Evidence informing base-year company-share estimates: The issuer-authored financial statement reports 2025 royalties, development services and events separately and explains net-of-storefront royalty accounting; modeled exclusions and retail retention convert the relevant royalty line into final-buyer expenditure.
134. MAGIC: THE GATHERING - Hasbro
   - Evidence informing base-year company-share estimates: Reports rounded FY2025 MAGIC revenue of USD xx.xx across tabletop and digital, providing the brand-level anchor for the explicitly modeled digital residual.
135. The New York Times Company Form 10-K - Year Ended December 31, 2025
   - Evidence informing base-year company-share estimates: Provides subscription categories, annual subscriber changes, xx.xx-day ARPU conventions and Games' standalone/bundled access routes. These constrain, but do not disclose, Games-only subscriber and revenue allocations.
136. Light & Wonder - Fourth Quarter and Full Year 2025 Earnings Presentation
   - Evidence informing base-year company-share estimates: Reports USD xx.xx FY2025 SciPlay revenue, separately from Gaming and iGaming, supporting the in-scope business numerator before the stated recognition-to-purchasing proxy.
137. Light & Wonder, Inc. Form 10-K - Year Ended December 31, 2025
   - Evidence informing base-year company-share estimates: SciPlay records player purchases gross and platform/payment fees as costs. Its virtual currency is not cash-redeemable; advertising is immaterial. These support single-counting and the non-wagering scope bridge.

138. Red Barrels - 3 Million Copies Sold and the Celebrations Have Just Begun
   · Evidence informing base-year company-share estimates: Red Barrels' February xx.xx 2025 issuer release headlines three million copies while describing over three million players and a xx.xx% promotional discount. The model treats this as a qualified cumulative activity anchor, not annual paid sales.
139. About - Red Barrels
   · Evidence informing base-year company-share estimates: Establishes Red Barrels' independent development and publishing role for its Outlast portfolio, supporting company attribution rather than an external-publisher revenue addition.
140. Thunder Lotus - Company Press Kit
   · Evidence informing base-year company-share estimates: Reports more than four million cumulative Spiritfarer copies sold and identifies the catalog and March-2025 xx.xx Immortals Early Access launch. Cumulative sales constrain scale, not the assumed annual replenishment rate.
141. A Journey to the Underworld: Inside the Launch of 33 Immortals
   · Evidence informing base-year company-share estimates: The April xx.xx 2025 commercial interview establishes more than xx.xx early xx.xx Immortals players. It does not identify paid-copy conversion, supporting an explicitly modeled purchaser-versus-access-user adjustment.
142. The Long Dark on Steam
   · Evidence informing base-year company-share estimates: The official storefront identifies Hinterland as developer and publisher, distinguishes game editions and supplies a xx.xx-review recent activity snapshot. These constrain an assumption-led purchasing proxy, not observed 2025 sales.
143. Dev Diary - April 2025
   · Evidence informing base-year company-share estimates: The April 2025 studio disclosure identifies The Long Dark and its expansion sales as the revenue supporting the independent studio and separates sequel development from existing commercial receipts.
144. Sea of Stars Surpasses 4 Million Players in Less Than Four Months
   · Evidence informing base-year company-share estimates: Sabotage's historical four-million-player announcement constrains commercial reach. It does not establish four million purchases or a 2025 revenue numerator.
145. Project Updates for Sea of Stars
   · Evidence informing base-year company-share estimates: Creator-authored updates establish that Throes of the Watchmaker was free on May xx.xx 2025 and that the mobile launch occurred on April xx.xx 2026, preventing paid-expansion or mobile-launch receipts from being inserted into 2025.
146. Company - Hyper Hippo Games
   · Evidence informing base-year company-share estimates: Hyper Hippo reports more than xx.xx cumulative installs, identifies its own publishing operation and describes its continuing portfolio. Install stock is used only through explicit active-audience assumptions.
147. AdVenture Capitalist Postmortem or: How Hyper Hippo Learned To Stop Worrying and Love Game Operations
   · Evidence informing base-year company-share estimates: The 2016 presentation involving Hyper Hippo and PlayFab describes AdVenture Capitalist as a one-million-plus-DAU game. It is a historical activity anchor, not a measured 2025 audience.
148. East Side Games Group Announces Fourth Quarter and 2025 Annual Results, Provides a Corporate Update and Issues 2026 Outlook
   · Evidence informing base-year company-share estimates: The reported 2025 ARPDAU of CAD xx.xx supplies a same-category idle-game monetization anchor. Hyper Hippo's xx.xx% adjustment remains a modeled company-specific assumption.
   · Evidence informing base-year company-share estimates: The company reports rounded annual revenue of CAD xx.xx, a fourth-quarter total of CAD xx.xx and annual daily-audience/monetization metrics. These anchor scale, not the final retained-consideration share.

149. Annual exchange rates - Bank of Canada
    - Evidence informing base-year company-share estimates: The official 2025 annual-average exchange rate is CAD xx.xx per USD, used to translate the modeled CAD numerator without an intermediate rounding step.
    - Evidence informing base-year company-share estimates: The official 2025 annual-average exchange rate is CAD xx.xx per USD, providing the currency bridge from Canadian-dollar operating disclosures to the frozen USD denominator.
150. Relic Entertainment | Game with us.
    - Evidence informing base-year company-share estimates: Relic reports cumulative franchise sales exceeding ten million Company of Heroes copies and seven million Dawn of War copies. These constrain historical franchise scale, not 2025 units or title-level receipts.
151. Warhammer 40,000: Dawn of War - Definitive Edition on Steam
    - Evidence informing base-year company-share estimates: The official commercial listing identifies Dawn of War Definitive Edition as a separate purchasable offering, supporting separation of remaster demand from historical franchise stock. It supplies no annual unit total.
152. About Us - Studio MDHR
    - Evidence informing base-year company-share estimates: Studio MDHR documents million-unit launch milestones for Cuphead and The Delicious Last Course and distinguishes its released catalog from development-stage offerings.
153. Cuphead has shifted five million copies in two years
    - Evidence informing base-year company-share estimates: Contemporaneous reporting corroborates Studio MDHR's September 2019 five-million-copy announcement. It is used as a dated historical company milestone, not a current sales estimate.
154. The Forest on Steam
    - Evidence informing base-year company-share estimates: The official storefront establishes The Forest as a commercially supplied Endnight title, supporting the predecessor catalog boundary but not its assumed annual purchasing volume.
155. Sons Of The Forest on Steam
    - Evidence informing base-year company-share estimates: The official storefront identifies the commercial Sons of the Forest offering and distinguishes its developer and publisher roles. The studio's contractual receipt percentage is not disclosed.
156. Sons of the Forest sells 2 million copies in first 24 hours
    - Evidence informing base-year company-share estimates: The February 2023 report corroborates Endnight's dated announcement of more than two million first-day purchases. That historical announcement constrains launch scale, not 2025 sales.
157. RimWorld on Steam
    - Evidence informing base-year company-share estimates: The official storefront supplies a xx.xx-review recent activity snapshot and identifies Ludeon as developer and publisher. Review incidence, calendar conversion and channel coverage remain modeled.
158. One million copies sold!
    - Evidence informing base-year company-share estimates: Ludeon's January xx.xx 2018 disclosure reports more than one million copies sold. It is a historical paid-owner scale anchor, not the actual 2025 active or eligible cohort.
159. The RimWorld - Odyssey expansion is out now!
    - Evidence informing base-year company-share estimates: The July xx.xx 2025 release notice establishes Odyssey's commercial launch and differentiated promotions for the base game and older expansions, supporting a release-specific purchasing model rather than uniform catalog growth.
160. East Side Games Group Inc. - Consolidated Financial Statements for the Three and Nine Month Periods Ended September 30, 2025 and 2024
    - Evidence informing base-year company-share estimates: The Canadian-dollar nine-month statement reports gaming revenue of xx.xx advertising revenue of xx.xx and cost of sales separately. These constrain commercial mix and prevent equating gross receipts with retained consideration or profit.

161. East Side Games Group Reports Q3 2025 Financial Results
- Evidence informing base-year company-share estimates: The third-quarter release distinguishes reported sequential revenue growth from growth excluding a previous-quarter one-time platform payment, supporting the derived CAD xx.xx non-consumer consideration adjustment.

162. East Side Games Group Reports 2024 Financial Results
- Evidence informing base-year company-share estimates: The reported rounded 2024 revenue of CAD xx.xx provides the prior-year commercial comparison used to qualify any inference that higher daily monetization necessarily produces annual revenue growth.

163. Squad Reaches 3 Million Copies Sold | Offworld
- Evidence informing base-year company-share estimates: Offworld's own historical disclosure reports more than three million Squad copies sold; this supports a cumulative scale anchor, not observed annual 2025 sales.

164. Games - Offworld
- Evidence informing base-year company-share estimates: The official portfolio identifies Squad, Squad xx.xx Beyond The Wire and Starship Troopers: Extermination, supporting included content scope rather than the modeled annual sales coefficients.

165. Publishing - HyperBeard
- Evidence informing base-year company-share estimates: The company reports Adorable Home thresholds above xx.xx downloads and USD xx.xx revenue, and Pocket Love thresholds above xx.xx downloads and USD xx.xx revenue.
- Evidence informing base-year company-share estimates: Pocket Love is identified as internal, while Cometa and another independent developer appear as partners; these support differentiated rights attribution, not the assumed annual mix or participation percentages.

166. HyperBeard
- Evidence informing base-year company-share estimates: The company reports more than xx.xx global downloads; the disclosure lacks a matched 2025 cutoff and is used only as a cumulative model anchor.

167. Mulaka on Steam
- Evidence informing base-year company-share estimates: Mulaka identifies Lienzo as developer/publisher, a February xx.xx 2018 release, xx.xx displayed cumulative reviews and USD xx.xx list pricing; annual conversion and realized value remain modeled.

168. Aztech Forgotten Gods on Steam
- Evidence informing base-year company-share estimates: Aztech Forgotten Gods identifies Lienzo as developer/publisher, a March xx.xx 2022 release and xx.xx displayed cumulative reviews, supporting the title-specific activity and age bridge.

169. Hunter's Legacy on Steam
- Evidence informing base-year company-share estimates: Hunter's Legacy identifies Lienzo as developer/publisher, a July xx.xx 2016 release and xx.xx displayed cumulative reviews in the selected retrieval, supporting the revised back-catalog input.

170. Pato Box on Steam
- Evidence informing base-year company-share estimates: Pato Box identifies Bromio and 2think design studio as developers, Bromio as publisher, a March 2018 release and xx.xx displayed cumulative reviews; the rights split is not disclosed.

171. Remnants of the Rift on Steam
- Evidence informing base-year company-share estimates: Remnants of the Rift identifies Bromio as developer and Mooncat Games as publisher, with xx.xx displayed reviews, May xx.xx 2025 full release, May xx.xx 2023 early access and USD xx.xx list pricing.
- Evidence informing base-year company-share estimates: The release timing constrains the annual-cohort assumption but does not measure annual sales or developer participation.

172. Bromio | We Love Making Games
    - Evidence informing base-year company-share estimates: Bromio distinguishes its Pato Box and Remnants content portfolio from a porting showcase that includes Neon City Riders, Greak and The Lullaby of Life; full customer-game receipts are not attributed from those service credits.
    - Evidence informing base-year company-share estimates: Greak appears as a PlayStation xx.xx porting project, supporting separation of the developer's modeled title interest from excluded production-service activity.
173. A Tiny Sticker Tale on Steam
    - Evidence informing base-year company-share estimates: A Tiny Sticker Tale identifies Ogre Pixel as developer/publisher, an October xx.xx 2023 release and xx.xx displayed cumulative reviews; the model does not treat them as 2025 transactions.
174. Lonesome Village on Steam
    - Evidence informing base-year company-share estimates: Lonesome Village identifies Ogre Pixel as developer/publisher, a November xx.xx 2022 release and xx.xx displayed cumulative reviews in the selected retrieval.
175. Hidden in my Paradise on Steam
    - Evidence informing base-year company-share estimates: Hidden in my Paradise identifies Ogre Pixel as developer/publisher, an October xx.xx 2024 release and xx.xx displayed cumulative reviews in the selected retrieval.
176. Jumper Jon on Steam
    - Evidence informing base-year company-share estimates: Jumper Jon identifies Ogre Pixel as developer/publisher, an August xx.xx 2025 release, xx.xx displayed reviews and USD xx.xx list pricing; its own activity counter anchors the modeled launch contribution.
177. Darkish Tale first devlog post - Darkish Tale by Ogre Pixel
    - Evidence informing base-year company-share estimates: The studio director's January xx.xx 2018 post reports more than xx.xx Warcher Defenders and xx.xx Swipe Casters downloads, providing historical scale rather than 2025 active users.
178. Android Apps by Ogre Pixel on Google Play
    - Evidence informing base-year company-share estimates: Ogre Pixel's Google Play page displays a xx.xx-plus A Tiny Sticker Tale download threshold and both paid and Play Pass routes; annual paying users and access consideration are not disclosed.
179. ABOUT NAVEGANTE
    - Evidence informing base-year company-share estimates: Navegante's company-authored presentation identifies its independent development role and Greak's 2021 multiplatform release across Nintendo, Xbox, PlayStation and PC, supporting scope rather than equal platform sales weights.
180. Greak: Memories of Azur on Steam
    - Evidence informing base-year company-share estimates: Greak identifies Navegante as developer, Team17 as publisher, an August xx.xx 2021 release and xx.xx displayed cumulative reviews.
    - Evidence informing base-year company-share estimates: The separate counterparties support a retained-interest adjustment; the xx.xx% participation is modeled, not reported.
181. 9 Years of Shadows on Steam
    - Evidence informing base-year company-share estimates: xx.xx Years of Shadows identifies Halberd as developer, indie.io as publisher, shared Halberd/Freedom Games copyright, xx.xx English reviews and USD xx.xx/USD xx.xx list/promotional prices.
    - Evidence informing base-year company-share estimates: English-language coverage, annual purchasing and developer participation require explicit modeled bridges.
182. JanduSoft S.L. - 9 Years of Shadows Press Kit
    - Evidence informing base-year company-share estimates: JanduSoft's primary press kit identifies July xx.xx 2025 PlayStation/Xbox releases of xx.xx Years of Shadows and USD xx.xx regular pricing, supporting partial-year additional console commerce rather than observed unit sales.

183. Halberd Studios: UP startup conquers the global video game industry
· Evidence informing base-year company-share estimates: The university's September-2025 account involving Halberd principals describes Mariachi Legends as in development; development and crowdfunding activity are not added as delivered 2025 game expenditure.
184. Fanatee - About Us
· Evidence informing base-year company-share estimates: Fanatee reports millions of daily players, xx.xx cumulative downloads and xx.xx cumulative sessions. These constrain the audience model but are not observed calendar-2025 expenditure.
185. CodyCross: Crossword Puzzles - Google Play
· Evidence informing base-year company-share estimates: The publisher-provided CodyCross listing identifies advertising, in-game purchases and ad-free subscription benefits, supporting the modeled separation of player expenditure and advertising.
186. Gameloft for Brands Expands Its Media Network with the Integration of Fanatee into COMBO! Pop
· Evidence informing base-year company-share estimates: Gameloft documents its advertising-network relationship with Fanatee; this supports an intermediary-overlap control but does not measure incremental advertising sales.
187. Afterverse - 2025 PK XD Player and Engagement Retrospective
· Evidence informing base-year company-share estimates: Afterverse's own 2025 year-end statement reports more than xx.xx annual PK XD players and xx.xx minutes played, providing the annual audience and engagement inputs to the modeled numerator.
188. Quem Somos - Afterverse
· Evidence informing base-year company-share estimates: Afterverse states that it left Movile in 2024 and subsequently focused on PK XD, supporting the independent company boundary and flagship-based proxy.
189. PK XD: Fun, Friends & Games - Google Play
· Evidence informing base-year company-share estimates: The publisher-provided PK XD listing identifies Afterverse Games, advertising and in-game purchases, and lists other developer-account titles. It supports monetization categories and the retained portfolio-coverage limitation.
190. Tapps Games Case Study - Firebase
· Evidence informing base-year company-share estimates: The Firebase customer case reports more than xx.xx monthly active users and over xx.xx games; the undated audience is explicitly bridged, not represented as a verified 2025 average.
191. Tapps Games - Creating Fun for Everyone
· Evidence informing base-year company-share estimates: Tapps describes its development and publishing portfolio, including Vlogger Go Viral and My Boo. Cumulative downloads are not substituted for annual sales.
192. Going Back to the Freemium Model - Google Play Apps & Games
· Evidence informing base-year company-share estimates: Google Play's historical developer case describes Tapps' transition from predominantly advertising monetization toward greater in-app purchasing. It informs the differentiated model but does not establish the 2025 mix.
193. Rogue Snail - 2025 was a transformative year for Hell Clock
· Evidence informing base-year company-share estimates: Rogue Snail's own 2025 retrospective reports more than xx.xx Hell Clock copies sold on day one and more than xx.xx within the first month; the later-year uplift and attributable receipts are modeled.
194. Hell Clock on Steam
· Evidence informing base-year company-share estimates: Hell Clock's listing identifies Rogue Snail, Mad Mushroom, a July xx.xx 2025 release and a USD xx.xx reference price; it supports product, period and external-publisher adjustments, not the assumed royalty rate.
195. Relic Hunters Legend on Steam
· Evidence informing base-year company-share estimates: The retrieved listing identifies Rogue Snail as developer and publisher, an August xx.xx 2025 release and xx.xx lifetime reviews. Reviews constrain the activity scenario but do not disclose annual paid units.

196. Mad Mimic - Official Games Catalog
   - Evidence informing base-year company-share estimates: The official catalog identifies Mad Mimic's current and older commercial titles, supporting separate new-release and legacy-catalog components while excluding development-service fees.
197. Mark of the Deep on Steam
   - Evidence informing base-year company-share estimates: The retrieved Mark of the Deep listing reports xx.xx lifetime reviews, a January xx.xx 2025 release and Light Up Games as publisher; it supports the activity proxy and separate publisher-participation assumption.
198. No Heroes Here 2 on Steam
   - Evidence informing base-year company-share estimates: No Heroes Here xx.xx's retrieved listing reports xx.xx lifetime reviews, a July xx.xx 2025 release and Mad Mimic as both developer and publisher; modeled annual purchases are not directly disclosed.
199. Dandy Ace on Steam
   - Evidence informing base-year company-share estimates: Dandy Ace's listing reports xx.xx lifetime reviews, a March xx.xx 2021 release, a USD xx.xx reference price and NEOWIZ publishing; these constrain the discounted mature-catalog model and duplication control.
200. ARVORE - Games
   - Evidence informing base-year company-share estimates: The official portfolio identifies Pixel Ripped 1989, 1995 and 1978, YUKI, The Line and Clawball as distinct immersive offerings. It supports commercial scope, not their assumed annual attachment or sales.
201. ARVORE - Clawball
   - Evidence informing base-year company-share estimates: The official Clawball page identifies a separate multiplayer VR offering. The playing cohort, paying incidence and virtual-item consideration in the model remain explicit assumptions.
202. Pixel Ripped 1995 on Steam
   - Evidence informing base-year company-share estimates: The official PC storefront establishes a commercial Pixel Ripped 1995 listing, supporting PC-VR participation rather than attributing all immersive content solely to Quest.
203. Pixel Ripped 1995 on Meta Quest
   - Evidence informing base-year company-share estimates: The official Quest listing supplies an independent commercial distribution premise for Pixel Ripped 1995. It does not establish the model's annual title-purchase volume.
204. Enigma of Fear - See You on November 28th, Producer Announcement of November 6, 2024
   - Evidence informing base-year company-share estimates: The producer's November xx.xx 2024 announcement reports more than xx.xx wishlists and xx.xx demo downloads. These are interest anchors for the modeled 2025 purchasing bridge, not observed sales.
205. Enigma of Fear on Steam
   - Evidence informing base-year company-share estimates: The listing identifies Dumativa and Cellbit as developers, Dumativa/CriticalLeap as publishers, a November xx.xx 2024 release and a USD xx.xx reference price; it supports period and rights-attribution adjustments.
206. Songs for a Hero - Definitive Edition on Steam
   - Evidence informing base-year company-share estimates: The retrieved listing reports xx.xx lifetime reviews, an April xx.xx 2020 release, Dumativa publishing and Castro Brothers co-development; these support a mature-catalog proxy with a separate participation adjustment.
207. Shieldmaiden: Remix Edition on Steam
   - Evidence informing base-year company-share estimates: The retrieved Shieldmaiden listing reports xx.xx lifetime reviews, a March xx.xx 2020 release and Dumativa as developer and publisher; annual transaction conversion remains modeled.
208. A.I.L.A on Steam
   - Evidence informing base-year company-share estimates: Retrieved A.I.L.A versions show xx.xx-xx.xx lifetime reviews; the final model uses xx.xx. The November xx.xx 2025 release, USD xx.xx reference price and named publishing counterparties constrain timing, realization and attribution assumptions.

209. Fobia - St. Dinfna Hotel on Steam
    - Evidence informing base-year company-share estimates: Fobia's retrieved listing reports xx.xx lifetime reviews, a June xx.xx 2022 release, Pulsatrix development and Maximum Entertainment publishing. It supports the older-catalog activity proxy, not the assumed annual or royalty proportions.
210. Inter-American Development Bank - Reconfiguración de las cadenas de valor en el sector de videojuegos, September 2025
    - Evidence informing base-year company-share estimates: The company profile distinguishes Etermax's owned games, game-related marketing/advertising and enterprise AI activities, supporting scope separation rather than allocation of all corporate activity to Gaming.
211. Peter Fodor, AppAgent - Trivia Crack GamePlan Case Study
    - Evidence informing base-year company-share estimates: AppAgent's account of its own consulting work for Trivia Crack reports more than xx.xx annual active users. The model conservatively uses xx.xx as an audience calibration, not observed 2025 sales or payers.
212. Google AdMob - AdMob Helps Trivia Crack Go Global and Reach Over 125 Million Users
    - Evidence informing base-year company-share estimates: The official historical AdMob customer case establishes advertising commercialization and an earlier xx.xx% advertising revenue mix for Trivia Crack. It supports dual monetization but does not verify the model's 2025 audience, CPM, purchasing or revenue.
213. Dedalord - Game Studio
    - Evidence informing base-year company-share estimates: Dedalord describes development and self-publishing and more than xx.xx cumulative downloads. This is the reach-stock input to the modeled activity bridge, not observed 2025 revenue.
214. Android Apps by Dedalord on Google Play
    - Evidence informing base-year company-share estimates: The developer storefront identifies Running Fred, advertising and a xx.xx-million-plus download floor, supporting the legacy mobile commercial category but not annual activity.
215. Dreamcore on Steam
    - Evidence informing base-year company-share estimates: Dreamcore identifies Tlön as publisher, January xx.xx 2025 as release date and 1933 cumulative reviews. These are inputs to the explicitly assumed launch-year purchasing model, not observed sales.
216. Kentum on Steam
    - Evidence informing base-year company-share estimates: Kentum identifies Tlön as developer and indienova/V Publishing as publishers, supporting exclusion of a second independent gross retail attribution to Tlön.
217. Per Aspera on Steam
    - Evidence informing base-year company-share estimates: Per Aspera identifies Tlön as developer and Raw Fury as publisher; royalties or development receipts are not added independently to the same final-buyer game expenditure.
218. Sector videojuegos en Uruguay - Febrero 2026
    - Evidence informing base-year company-share estimates: The February 2026 government business case reports more than xx.xx Kingdom Rush downloads and describes Alliance commercialization. Only the company-specific commercial observations are used; attributed commercial market-research totals elsewhere in the document are excluded.
    - Evidence informing base-year company-share estimates: The company case identifies Pomelo's original mobile titles and Outlanders businesses, supporting the portfolio boundary rather than an observed annual revenue.
219. Games - Ironhide Game Studio
    - Evidence informing base-year company-share estimates: Ironhide's catalog establishes continuing Kingdom Rush and Iron Marines families and separates released products from newer catalog additions; catalog breadth is not treated as a sales weight.

220. Mars: Mars - Apps on Google Play
    - Evidence informing base-year company-share estimates: Mars: Mars identifies Pomelo, advertising, in-app purchases and a xx.xx-million-plus download floor. The stock supports the modeled reach proxy, not observed annual activity.
221. Once Upon a Tower - Apps on Google Play
    - Evidence informing base-year company-share estimates: Once Upon a Tower identifies Pomelo, advertising, in-app purchases and a xx.xx-million-plus download floor, providing the second mobile reach-stock anchor.
222. Outlanders on Steam
    - Evidence informing base-year company-share estimates: Outlanders identifies Pomelo as developer and publisher, a March 2023 release and xx.xx cumulative reviews, supporting an explicitly modeled standalone retail purchasing component.
223. Sunken Stones on Steam
    - Evidence informing base-year company-share estimates: Sunken Stones identifies Spritewrench as developer and publisher, a July xx.xx 2025 release, xx.xx lifetime reviews and a current USD xx.xx price. These are inputs to an explicitly assumption-led annual purchasing estimate, not observed annual revenue.
224. On the Peril of Parrots on Steam
    - Evidence informing base-year company-share estimates: On the Peril of Parrots identifies Spritewrench as developer and publisher, an April 2023 release, xx.xx lifetime reviews and current USD xx.xx price, constraining the modeled catalog component.
225. Grimm & Tonic: Aperitif on Steam
    - Evidence informing base-year company-share estimates: Grimm & Tonic identifies Spritewrench as developer and publisher, a January 2020 release and six lifetime reviews. Its current developer-controlled direct listing also provides a USD xx.xx price anchor.
226. Shiny Gauntlet on Steam
    - Evidence informing base-year company-share estimates: Shiny Gauntlet identifies Spritewrench as developer and publisher, an October 2015 release, ten lifetime reviews and a current USD xx.xx price, constraining the small legacy-catalog component.
227. spritewrench - itch.io
    - Evidence informing base-year company-share estimates: The developer-controlled storefront offers Questlike and Shiny Gauntlet at USD xx.xx and Grimm & Tonic at USD xx.xx. It supports direct-download availability and price bounds, not the modeled transaction counts.
228. Duppy Detective Tashia on Steam
    - Evidence informing base-year company-share estimates: Duppy Detective Tashia's primary release date is June xx.xx 2026; its current sales activity is excluded from the 2025 catalog estimate.
229. everplay group plc - Annual Report and Accounts 2025
    - Evidence informing base-year company-share estimates: Reports approximately GBP xx.xx calendar-2025 revenue and GBP xx.xx StoryToys revenue; explains gross Apple/Google accounting, net accounting for other digital platforms, and separate platform-license contracts.
    - Evidence informing base-year company-share estimates: Supports company-specific financial anchors, not the modeled qualifying fractions, retail retention or final market-share percentage.
230. everplay - FY 2025 Results, March 2026
    - Evidence informing base-year company-share estimates: Reports xx.xx Team17 units and divisional operating information, supporting the independent-publisher commercial-scale check rather than a directly observed share.
231. PULLUP Entertainment Reports 2024/25 Full-Year Revenue - April 16, 2025
    - Evidence informing base-year company-share estimates: Reports January-March 2025 headline revenue of EUR xx.xx and Other revenue of EUR xx.xx, supplying the first quarter of the calendar bridge.
232. PULLUP Entertainment - 2025/26 Third-Quarter Revenue, January 15, 2026
    - Evidence informing base-year company-share estimates: Reports April-December 2025 group revenue of EUR xx.xx and Other revenue of EUR xx.xx, supplying the remaining nine months of the calendar bridge.

233. PULLUP Entertainment - Annual Financial Report and CSR Report 2024-2025
    - Evidence informing base-year company-share estimates: Reports EUR xx.xx digital and EUR xx.xx retail fiscal-year channel revenue; describes net distributor-commission accounting and marketing/audiovisual Other activities.
    - Evidence informing base-year company-share estimates: Identifies developer/IP royalties as costs, supporting nonadditive publisher attribution.
234. NACON - Sales for the 2024/25 Financial Year, April 28, 2025
    - Evidence informing base-year company-share estimates: Reports January-March 2025 Games revenue of EUR xx.xx and Accessories revenue of EUR xx.xx; identifies Other as Mobile and Audio.
235. NACON - Sales for the First Nine Months of Fiscal Year 2025-26, January 19, 2026
    - Evidence informing base-year company-share estimates: Reports April-December 2025 Games revenue of EUR xx.xx and Accessories revenue of EUR xx.xx; reported accessory revenue declined xx.xx% against the comparable period.
    - Evidence informing base-year company-share estimates: Supports actual-period purchasing calibration and challenges automatic tariff-related retail-price uplift assumptions.
236. NACON - Universal Registration Document 2024/2025
    - Evidence informing base-year company-share estimates: The consolidated product table reports fiscal digital-game revenue of EUR xx.xx and physical-game revenue of EUR xx.xx, used as a calendar-mix proxy.
    - Evidence informing base-year company-share estimates: The audit narrative's separate xx.xx% digital statement does not reconcile with those tabulated amounts; the remaining source inconsistency is explicitly retained.
237. Digital Bros Group - Consolidated financial statements as of June 30, 2025
    - Evidence informing base-year company-share estimates: Fiscal-year June 2025 disclosures provide premium digital revenue of EUR xx.xx, physical distribution EUR xx.xx, sublicensing EUR xx.xx and free-to-play EUR xx.xx.
    - Evidence informing base-year company-share estimates: Digital distribution includes transactional and buyout receipts; these inputs require a consumer-expenditure bridge.
238. Digital Bros Group - Half year condensed financial statements as of December 31, 2025
    - Evidence informing base-year company-share estimates: July-December 2025 and comparative 2024 revenue categories support the calendar-year subtraction/addition bridge.
    - Evidence informing base-year company-share estimates: The disclosure distinguishes retail distribution, digital transactions, buyouts and sublicensing; it does not report the modeled market share.
239. IO Interactive A/S - Annual report 2024/25
    - Evidence informing base-year company-share estimates: The issuer-authored audited filing reports DKK xx.xx revenue for April 2024-March 2025 and describes service and licence/royalty recognition.
    - Evidence informing base-year company-share estimates: The fiscal-to-calendar, excluded-payment and retail-retention adjustments are modeled rather than disclosed.
240. Rust - Surviving 12 Years
    - Evidence informing base-year company-share estimates: The 2025 retrospective reports more than xx.xx unique Rust PC players, supporting an annual activity anchor but not observed paid conversion.
    - Evidence informing base-year company-share estimates: Console activity and mobile preregistrations are separately presented and are not substituted for PC primary purchases.
241. Facepunch - Official company portfolio
    - Evidence informing base-year company-share estimates: The official company portfolio supports the existence of additional game activity; the small additional-purchasing allowance remains explicitly assumption-led.
242. Bohemia Interactive - 2025 in review
    - Evidence informing base-year company-share estimates: The retrospective supplies Arma Reforger copy activity, Arma xx.xx annual audience/new-recruit figures and DayZ peak daily activity.
    - Evidence informing base-year company-share estimates: These heterogeneous commercial anchors support the modeled purchasing cohorts, not a directly observed annual revenue numerator.

243. Bohemia Interactive sales reaching 68 million USD in 2019
    - Evidence informing base-year company-share estimates: The company reports USD xx.xx sales and xx.xx game/DLC copies in 2019, used only as a historical commercial-scale check.
244. SCS Software - Return to Winterland Conclusion
    - Evidence informing base-year company-share estimates: SCS reports xx.xx participants in the winter event concluding January 2025; the model applies explicit event-penetration and annual-purchasing assumptions.
245. SCS Software - Project Scandinavia Refresh
    - Evidence informing base-year company-share estimates: More than five million cumulative Scandinavia expansion copies provide a historical paying-cohort plausibility constraint, not annual sales or current active customers.
246. 11 bit studios S.A. podsumowuje 2025 rok i odkrywa karty zapowiadając nowy harmonogram wydawniczy
    - Evidence informing base-year company-share estimates: The issuer's rounded PLN xx.xx 2025 sales announcement provides provisional financial calibration; complete statement verification remains outstanding.
247. 11 bit studios has embarked on new proprietary projects
    - Evidence informing base-year company-share estimates: The issuer reports PLN xx.xx first-half 2025 revenue and identifies recurring Game Pass availability payments, supporting separation of business licensing from consumer purchases.
248. Remedy Entertainment - Q4 2025 investor presentation
    - Evidence informing base-year company-share estimates: The issuer-authored Q4 presentation separates EUR xx.xx development fees from EUR xx.xx game sales/royalties.
    - Evidence informing base-year company-share estimates: Annualization and direct-consumer attribution are assumptions, not observed annual retail spending.
249. Frontier Developments plc Annual report and accounts 2025
    - Evidence informing base-year company-share estimates: FY ended May 2025 publishing revenue of GBP xx.xx anchors the modeled numerator; calendar timing, B2B exclusion, currency and retail adjustments remain assumptions.
250. Travian Games - Together in Games | Browser & Mobile Strategy Games
    - Evidence informing base-year company-share estimates: The disclosed xx.xx-million global audience and identified group portfolio support the audience-pool proxy, not observed annual payers or revenue.
251. CipSoft - Award-Winning Record Year: CipSoft Named One of Germany’s 100 Best Employers
    - Evidence informing base-year company-share estimates: Preliminary 2025 revenue above EUR xx.xx supplies a conservative monetary anchor; the disclosure links performance to Tibia and The Settlers Online.
252. CipSoft - Company
    - Evidence informing base-year company-share estimates: The 2025 MultiPayer offering establishes an adjacent commerce-service activity requiring exclusion; it does not disclose the modeled xx.xx% fee share.
253. Latest Press News | GIANTS Software Press Center
    - Evidence informing base-year company-share estimates: Official dated releases provide cumulative Farming Simulator xx.xx sales milestones and establish GIANTS' publishing role and 2025 commercial catalog. Annual units, attachment and realized purchasing values are modeled separately.
254. 2025 at Poki: A Year in Review
    - Evidence informing base-year company-share estimates: The December xx.xx 2025 company review reports xx.xx gameplays and xx.xx players. Gameplay is an advertising-activity input, not observed annual revenue.
    - Evidence informing base-year company-share estimates: Poki's disclosed gameplay scale supplies a browser-activity comparison for the CrazyGames model; it does not directly measure CrazyGames gameplays or monetization.

255. Poki - Let the world play
   - Evidence informing base-year company-share estimates: Poki's official business page describes its free-play, developer and advertiser relationships and approximately xx.xx monthly-player scale; it does not disclose annual advertising billings.
   - Evidence informing base-year company-share estimates: The approximately xx.xx monthly-player scale is used with Poki's gameplay disclosure as a dated-definition-limited peer calibration, not a measured CrazyGames engagement rate.
256. CrazyGames - 2025 was a big year for CrazyGames
   - Evidence informing base-year company-share estimates: CrazyGames' own 2025 retrospective reports reaching xx.xx MAU and rolling out IAP and mobile publishing. Average annual MAU and purchasing conversion remain assumptions.
257. CrazyGames Developer Terms - August 18, 2025
   - Evidence informing base-year company-share estimates: The August xx.xx 2025 terms establish Maxflow's publishing identity and link developer compensation to in-game advertising performance and advertiser payments, supporting single-counting of the advertising flow.
258. GDEV announces preliminary, unaudited results for the fourth quarter and twelve months of 2025
   - Evidence informing base-year company-share estimates: Preliminary 2025 results disclose rounded USD xx.xx IAP bookings, USD xx.xx advertising bookings, separate platform-commission expenses and revenue deferral effects. These constrain the annual-flow numerator.
   - Evidence informing base-year company-share estimates: GDEV's disclosed xx.xx monthly paying users, USD xx.xx monthly bookings per payer and advertising scale provide a limited mid-core monetization comparison; they are not direct MY.GAMES observations.
259. War Robots Achieves $1 Billion in Lifetime Revenue
   - Evidence informing base-year company-share estimates: The company announcement identifies gross lifetime revenue and historical 2024 monthly activity up to xx.xx, constraining title scale without establishing a 2025 annual average.
260. Rush Royale Tops Tower Defence Genre, Achieving Record Player Engagement With Over 73 Million Installs
   - Evidence informing base-year company-share estimates: MY.GAMES reports USD xx.xx of Rush Royale revenue in 2023. This older own-business disclosure calibrates scale; third-party rankings on the same page are not used.
261. Fable Town Celebrates Its First Anniversary with 3M Installs, $9M Revenue, and Three Weeks Of Festivities
   - Evidence informing base-year company-share estimates: The September 2025 announcement reports USD xx.xx lifetime revenue and more than USD xx.xx monthly revenue in July and August. Full-year revenue and recognition conventions remain modeled.
262. MY.GAMES' Castle Duels Hits $1 Million in Monthly Revenue
   - Evidence informing base-year company-share estimates: The April xx.xx 2025 company announcement reports more than USD xx.xx monthly revenue in March and April and USD xx.xx lifetime revenue, supporting a ramp-adjusted annual proxy.
263. MY.GAMES Celebrates 7th Anniversary of Left to Survive With Month-Long Barbecue Party Event
   - Evidence informing base-year company-share estimates: The July 2025 company announcement reports xx.xx lifetime installs and USD xx.xx lifetime revenue. These establish continuing title scale, not annual purchasing or active users.
264. MY.GAMES Announces Rush Royale Has Secured ISBN License in China
   - Evidence informing base-year company-share estimates: The May xx.xx 2025 announcement identifies iDreamSky as the Chinese publishing partner and describes launch preparation after approval; approval is not converted into an assumed sales uplift.
265. Vivendi: 2025 Full-Year Results Show Improvement
   - Evidence informing base-year company-share estimates: The issuer's audited-results announcement reports Gameloft 2025 revenue of EUR xx.xx PC/consoles, EUR xx.xx mobile and EUR xx.xx BtoB. Channel gross-ups, BtoB eligibility and USD translation are explicit model assumptions.

266. MICROIDS - Comptes annuels, exercice du 1 janvier au 31 décembre 2025
   · Evidence informing base-year company-share estimates: The signed 2025 company accounts report EUR xx.xx revenue, including EUR xx.xx production sold and EUR xx.xx merchandise. These are publisher-level inputs, not observed final-buyer expenditure.
267. About Microids | Microids
   · Evidence informing base-year company-share estimates: The official portfolio establishes Microids' game-development, publishing and distribution role, supporting the game-publishing scope adjustment rather than attribution of all related group businesses.
268. Tactile Games ApS - Annual Report for 2024
   · Evidence informing base-year company-share estimates: The 2024 annual report states approximately DKK xx.xx revenue, anticipates an approximately xx.xx% decline in 2025, and classifies sales-platform commissions as direct expenses. These support the guidance bridge and avoidance of a duplicate IAP gross-up.
269. Homa | Homa new branding
   · Evidence informing base-year company-share estimates: Homa's historical company disclosure reports more than xx.xx published games and one billion cumulative downloads. These constrain commercial reach but do not establish annual 2025 users or revenue.
270. Homa | How to Supercharge Your Mobile Game with Homa's IP
   · Evidence informing base-year company-share estimates: The historical Aquarium Land disclosure reports more than xx.xx downloads and xx.xx daily active players, providing a title-specific active/reach comparator for Homa's explicitly modeled portfolio bridge.
   · Evidence informing base-year company-share estimates: The approximately xx.xx% historical active/download relationship is used only as a limited casual-game comparator for Two Desperados' assumed xx.xx% effective active fraction, not as observed company activity.
271. Financial Results of Ten Square Games Group for Q4 and Full Year 2025
   · Evidence informing base-year company-share estimates: The official full-year release reports PLN xx.xx 2025 bookings and describes direct-to-consumer purchasing. Bookings constrain the annual purchasing numerator; direct checkout is not given a separate spending uplift.
272. Ten Square Games S.A. Capital Group - Consolidated Quarterly Report for 3Q 2025
   · Evidence informing base-year company-share estimates: The accounting policy places distributor and payment-aggregator commissions in selling costs and distinguishes advertising and licensed-partner revenue. This prevents an unsupported additional commission gross-up.
273. Software Engineer Intern | Two Desperados
   · Evidence informing base-year company-share estimates: The company disclosure with a July xx.xx 2025 application deadline identifies its three released titles and more than xx.xx cumulative players. This is a dated reach anchor, not an observed active-user or revenue total.
274. SEGA - S.T.A.L.K.E.R. 2 Worldwide Sales Exceed One Million Copies
   · Evidence informing base-year company-share estimates: The November xx.xx 2024 commercial announcement reports worldwide S.T.A.L.K.E.R. xx.xx sales exceeding one million copies. It constrains launch scale only; the modeled calendar-2025 unit continuation is not reported by this source.
275. Raport ESPI 32/2025 Wyniki sprzedaży gry „Cronos: The New Dawn”
   · Evidence informing base-year company-share estimates: The November xx.xx 2025 regulatory announcement reports more than xx.xx Cronos: The New Dawn copies sold across platforms. It anchors units, not the assumed year-end extension, realized price or final share. ([ir.blooberteam.com](https://ir.blooberteam.com/report/raport-espi-xx.xx-2025-wyniki-sprzedazy-gry-cronos-the-new-dawn/))
276. Skonsolidowany raport roczny grupy kapitałowej Bloober Team S.A. za rok 2025
   · Evidence informing base-year company-share estimates: The consolidated calendar-2025 report records PLN xx.xx revenue. This is a mixed-role financial scale check, not an observed final-buyer numerator. ([ir.blooberteam.com](https://ir.blooberteam.com/report/skonsolidowany-raport-roczny-grupy-kapitalowej-bloober-team-s-a-za-rok-2025/))

277. G5 Entertainment AB - Annual Report 2025

· Evidence informing base-year company-share estimates: The annual financial summary reports 2025 revenue of SEK xx.xx, distributor commissions of SEK xx.xx and external-developer royalties of SEK xx.xx. Expense presentation supports avoiding a second platform-fee gross-up or additive royalty count. ([storage.mfn.se](https://storage.mfn.se/5db5e993-bcbb-459f-xx.xx-67a12716e4af/g5-annual-report-2025.pdf?utm_source=openai))

278. About SayGames

· Evidence informing base-year company-share estimates: The retrieved company presentation reports xx.xx monthly active users. It supports the activity proxy but does not establish a calendar-2025 average or monetization rate. ([say.games](https://say.games/about/))

279. Publisher SayGames hits 4 billion downloads, successfully transitions to hybrid monetization model

· Evidence informing base-year company-share estimates: The company's February 2023 announcement reports USD xx.xx in 2022 in-app-purchase revenue. This is a dated company operating anchor, not 2025 revenue. ([say.games](https://say.games/news/hybrid/))

280. SayGames Reports $300 Million in Idle Arcades Revenue, Partners with LoadComplete to Launch Chainsaw Juice King

· Evidence informing base-year company-share estimates: The April xx.xx 2025 announcement reports USD xx.xx cumulative idle-arcade revenue. The cumulative stock constrains commercial scale but is not treated as annual 2025 revenue. ([say.games](https://say.games/news/chainsaw-juice-king-launch/))

281. AZUR GAMES - Play, Publish, Work, Grow with Us!

· Evidence informing base-year company-share estimates: The retrieved company audience counter reports more than xx.xx monthly active users. The model separately declares its retrospective 2025 activity and monetization assumptions; download leadership is not used as a share weight. (azurgames.com)

282. PCF Group S.A. - Śródroczne skonsolidowane sprawozdanie za okres 3 miesięcy zakończony 31.03.2025 r.

· Evidence informing base-year company-share estimates: The first-quarter consolidated filing reports PLN xx.xx self-publishing revenue, PLN xx.xx development fees and PLN xx.xx royalties, while describing platform-net receipts and funding distinctions. These constrain the model's included versus excluded economic roles. ([pap-mediaroom.pl](https://pap-mediaroom.pl/sites/default/files/attachments/xx.xx/DOC.xx.xx.zal01_PCF_SSF_Q1_2025.pdf))

283. PCF GROUP SA Raport okresowy roczny skonsolidowany SRR

· Evidence informing base-year company-share estimates: The ESPI annual regulatory summary reports consolidated 2025 revenue of PLN xx.xx. It is used only as a mixed-business financial constraint, not as an automatic Gaming purchasing numerator. ([pap-mediaroom.pl](https://pap-mediaroom.pl/biznes-i-finanse/pcf-group-sa-raport-okresowy-roczny-skonsolidowany-srr-xx.xx))

284. MAG Interactive - Interim Report Q1 2025/26

· Evidence informing base-year company-share estimates: The Q1 2025/xx.xx filing supplies fiscal-year and September-November IAP, advertising and other-revenue components, separately expensed platform fees, and Primetime divestment adjustments used in the calendar bridge. ([maginteractive.com](https://www.maginteractive.com/files/reports/2026/eng-xx.xx-xx.xx-q1-final.pdf))

285. MAG Interactive AB (publ) publishes Interim Report September - February 2025/2026

· Evidence informing base-year company-share estimates: The Q2 release reports adjusted December-February revenue of SEK xx.xx for 2025/xx.xx versus SEK xx.xx for 2024/xx.xx. One-third of their difference is explicitly modeled as the December replacement adjustment, not observed monthly revenue. ([view.news.eu.nasdaq.com](https://view.news.eu.nasdaq.com/view?id=b2914c6212aa0d43271ec85f409dda255&lang=en&src=micro))

286. Hill Climb Racing breaks a new record: 2 billion downloads

· Evidence informing base-year company-share estimates: The January xx.xx 2026 release reports more than four million daily players for original Hill Climb Racing; this is a near-base-year audience anchor, not observed 2025 revenue.

287. Fingersoft and Hill Climb Racing turn 10
   · Evidence informing base-year company-share estimates: The April 2022 release reports more than four million average daily users during 2021, providing an earlier dated check on the modeled original-title audience scale.
288. Hill Climb Racing Lite in early access on Poki
   · Evidence informing base-year company-share estimates: The March xx.xx 2025 announcement establishes a browser-game distribution relationship with Poki; it supports commercial channel presence but does not disclose licensing receipts.
289. Nordcurrent brings the iconic TGI Fridays into Cooking Fever
   · Evidence informing base-year company-share estimates: The January xx.xx 2024 company disclosure identifies ten million monthly Cooking Fever users and a branded integration; the model explicitly bridges this dated audience into 2025 rather than treating it as current measured revenue.
290. Why is Nordcurrent moving to publishing?
   · Evidence informing base-year company-share estimates: The company's publishing discussion distinguishes mobile development from PC/console publishing and reports a historical mobile revenue contribution exceeding xx.xx%; this is a mix plausibility check, not a disclosed 2025 allocation.
291. Zhejiang Jinke Tom Cat Culture Industry Co., Ltd. - 2025 Annual Report
   · Evidence informing base-year company-share estimates: The mandatory 2025 filing reports Outfit7 subsidiary revenue of CNY xx.xx and separately classifies group media/film and licensing revenue, supporting the disclosed monetary anchor and modeled exclusion bridge.
292. Outfit7 Investments Limited - Goodwill Impairment Asset Valuation Report at December 31, 2025
   · Evidence informing base-year company-share estimates: The exchange-filed valuation document reports Outfit7 consolidated 2025 revenue of EUR xx.xx versus EUR xx.xx in 2024, corroborating annual scale and providing counterevidence to automatic growth assumptions.
293. Nekki - Game Developer and Publisher: Games and Company Portfolio
   · Evidence informing base-year company-share estimates: Nekki discloses billion-scale cumulative game downloads, franchise-specific audience thresholds and a separate Cascadeur tool offering; these constrain the modeled game cohort and the exclusion of development-tool sales, not observed annual revenue.
294. Owlcat Reddit AMA 2024 - Answers! January 29, 2025
   · Evidence informing base-year company-share estimates: Owlcat's January xx.xx 2025 disclosure reports Rogue Trader passing one million cumulative copies and identifies continuing game and publishing activity; annual units, prices and attribution percentages remain modeled.
295. Warhammer 40,000: Dark Heresy - News and 2025 Founder-Access Announcements
   · Evidence informing base-year company-share estimates: The dated Dark Heresy news archive documents paid founder-pack eligibility and December 2025 alpha access; it supports the existence of a prepaid game offering, not the modeled order count or receipts.
296. Guillemot Corporation - 2025 Annual Results
   · Evidence informing base-year company-share estimates: Reports calendar-2025 revenue of EUR xx.xx, including EUR xx.xx Thrustmaster and EUR xx.xx Hercules; supports the gaming-accessory numerator and mixed-portfolio exclusion, not the modeled retail gross-up.
297. Atari - Fiscal Year 2025 Earnings
   · Evidence informing base-year company-share estimates: Reports fiscal-year-ended-March-2025 Games revenue of EUR xx.xx and Hardware revenue of EUR xx.xx, with separate licensing and work-for-hire context; supplies prior-period monetary anchors.
298. Atari - Half-Year 2025/2026 Results
   · Evidence informing base-year company-share estimates: Reports April-September 2025 Games revenue of EUR xx.xx and Hardware revenue of EUR xx.xx, comparable prior-half values, and EUR xx.xx Thunderful contribution from September; identifies seasonality and mixed publishing/development roles.

299. Tamatem Games - About Us
    - Evidence informing base-year company-share estimates: Reports approximately one million monthly active users and xx.xx cumulative downloads; supplies an undated audience calibration anchor, not an observed calendar-2025 average.
    - Evidence informing base-year company-share estimates: The disclosed active-audience-to-cumulative-download relationship supplies an explicitly qualified peer coefficient for the Maysalward stock-to-activity model; it does not measure Maysalward activity.
300. Tamatem Games - Changing the Game: Interview with Hussam Hammo, Founder of Tamatem
    - Evidence informing base-year company-share estimates: Describes in-app purchasing, in-game advertising and revenue-sharing with developers; supports monetization classification and single-counting treatment, not the modeled conversion or spending rates.
301. Google Play - Android Apps by Maysalward
    - Evidence informing base-year company-share estimates: The developer catalog identifies Dominoes, its xx.xx-million-plus cumulative download threshold, advertising and in-app purchasing; supports commercial scale and monetization classification, not annual active users.
302. MAG Interactive - Annual Report 2024/2025
    - Evidence informing base-year company-share estimates: Reports fiscal-2024/2025 ARPDAU of xx.xx US cents; used only as a directional casual-game monetization comparison, with explicit portfolio, geography and accounting qualifications.
    - Evidence informing base-year company-share estimates: Provides the same independently reported monetization comparison for testing the lower-yield Maysalward assumptions, not its audience or attributable revenue.
303. From Riyadh to the Global Stage - Spoilz
    - Evidence informing base-year company-share estimates: The February xx.xx 2025 company announcement reports two million players globally. This constrains cumulative commercial reach; it does not report monthly activity or revenue.
304. □□□□□□□ □□□ :□□□ □□□ - App Store developer listing
    - Evidence informing base-year company-share estimates: The current developer listing identifies Last Letter as free with in-app purchases and advertising. It supports monetization-format assumptions only, not 2025 revenue, prices or conversion.
305. UMX Studio Celebrates 11 Years of Creativity and Innovation in the Gaming World
    - Evidence informing base-year company-share estimates: The June xx.xx 2025 company disclosure reports xx.xx monthly active users worldwide and more than xx.xx cumulative downloads. Monthly activity, not downloads, anchors the modeled annual audience.
306. King Of Steering - UMX Studio
    - Evidence informing base-year company-share estimates: The product page displays xx.xx downloads and xx.xx daily active users. These are historical scale checks, not a calendar-2025 annual revenue disclosure.
307. Climbing Sand Dune - UMX Studio
    - Evidence informing base-year company-share estimates: The product page displays xx.xx downloads and xx.xx daily active users, providing a separate historical activity check for the modeled portfolio.
308. Yalla Group Limited - Form 20-F for the Year Ended December 31, 2025
    - Evidence informing base-year company-share estimates: The audited 2025 filing reports USD xx.xx games-services revenue separately from chatting and other revenue. Payment commissions are expenses, while revenue recognition and pooled deferred balances require an explicit annual-purchasing bridge.
309. Doubling Down on Good Job Games
    - Evidence informing base-year company-share estimates: The investor's 2025 financing announcement reports Match Villains exceeding xx.xx daily active users. This supports an audience anchor, not annual revenue or the assumed payer parameters.
310. 2024 Selection Series - Meet the Endeavor Entrepreneurs
    - Evidence informing base-year company-share estimates: The 2024 selection publication reports ten million lifetime Spyke players. Previous-company activity attributed to its founders is not used as Spyke's own activity.

311. Behind the Curtain: Why We Selected Turkish Startup Spyke Games
    - Evidence informing base-year company-share estimates: The March xx.xx 2025 assessment describes predominantly in-app purchasing and relatively limited advertising, supporting an IAP-heavy model rather than an advertising-dominated allocation.
312. Grand Games raises $30M Series A to build genre-defining mobile games
    - Evidence informing base-year company-share estimates: The January xx.xx 2025 announcement reports more than USD xx.xx monthly gross in-app revenue across Magic Sort and Car Match; annualization and advertising remain modeled.
313. Grand Games raises $70M Series B to scale hybrid casual gaming
    - Evidence informing base-year company-share estimates: The May xx.xx 2026 announcement reports fivefold year-over-year revenue growth. Its unspecified comparison period does not independently establish the modeled calendar-2025 annual total.
314. Kitchen Masters - Google Play
    - Evidence informing base-year company-share estimates: The primary Kitchen Masters listing identifies Bigger Games, in-app purchasing and a cumulative 1M+ Android installation threshold. The threshold is not a 2025 annual activity observation.
315. Fun is a Feeling: Building Emotion Engines for the Next Wave of Mobile Gaming
    - Evidence informing base-year company-share estimates: The June xx.xx 2025 investment announcement identifies Kitchen Masters commercialization and financing for expansion. Financing is excluded from the purchasing numerator.
316. Mount & Blade II: Bannerlord sales milestone and War Sails announcement - March 21, 2025
    - Evidence informing base-year company-share estimates: The March xx.xx 2025 issuer publicity confirms more than five million cumulative Bannerlord sales, excluding subscription players, and announces an expansion. Neither annual sell-through nor realized expansion receipts are observed.
317. Verve Group SE - Interim Report Q3 2024
    - Evidence informing base-year company-share estimates: Verve's Q3 2024 report identifies Fugo as an advertising-supply partner with nine million people playing its games. The audience's activity interval is unspecified and is not represented as observed MAU.
318. Words of Wonders: Crossword - Google Play
    - Evidence informing base-year company-share estimates: The primary Words of Wonders listing identifies Fugo Games and both advertising and in-app purchasing; its cumulative download threshold is not annual revenue.
319. How Fugo Games increased on-device installs 20x with ironSource Aura
    - Evidence informing base-year company-share estimates: Company-authored partner material dated February xx.xx 2022 establishes Fugo's international operating reach. Historical cumulative reach and installation growth are not substituted for 2025 paying activity.
320. We Are Candivore
    - Evidence informing base-year company-share estimates: Candivore's current company page reports xx.xx downloads and identifies its Match Masters business. Annual active users and purchasing conversion remain modeled.
321. Haveli Investments Leads $100 Million Investment into Candivore
    - Evidence informing base-year company-share estimates: The August 2023 transaction announcement reports more than xx.xx Match Masters downloads and USD xx.xx cumulative revenue. These are historical scale checks, not calendar-2025 gross purchasing.
322. Good Job Games - Games
    - Evidence informing base-year company-share estimates: Good Job Games' official catalog presents Wonder Blast, creating a historical-portfolio attribution question when compared with the current Fugo storefront counterparty.

323. Wonder Blast - Google Play
   - Evidence informing base-year company-share estimates: The current Wonder Blast listing names Fugo's legal developer and support contacts, qualifying Good Job's historical catalog attribution without establishing the 2025 transfer date.
   - Evidence informing base-year company-share estimates: The current listing establishes Fugo's storefront counterparty role, not the effective acquisition date or attributable 2025 Wonder Blast purchasing.
324. Paeezan Studio | LinkedIn
   - Evidence informing base-year company-share estimates: The company's own profile reports more than xx.xx users, five million active players and over ten released games. The active-player threshold anchors an explicitly modeled 2025 audience bridge; it is not observed 2025 sales or a defined annual payer count. ([linkedin.com](https://www.linkedin.com/company/paeezan-game-studio))
325. Play Paeezan - Game Studio
   - Evidence informing base-year company-share estimates: The company website identifies its game portfolio and describes nearly xx.xx active players and fans. The broader wording is not substituted for a defined active-player count or annual purchasing measure. ([playpaeezan.com](https://www.playpaeezan.com/))
326. Pesarkhandeh | Strategy Online - Apps on Google Play
   - Evidence informing base-year company-share estimates: The primary-store record identifies a marketed Paeezan game, advertising and a cumulative one-million-download threshold. It corroborates an advertising-capable commercial offering but does not verify modeled 2025 exposure, CPM or payer spending. ([play.google.com](https://play.google.com/store/apps/details?hl=en_US&id=com.paeezan.mafiozo&utm_source=openai))
327. How ID@Xbox is Enabling 8 Global Game Developers to Realize Their Vision
   - Evidence informing base-year company-share estimates: The dated April xx.xx 2024 disclosure identifies Nightscape as Mezan's debut project under development and distinguishes development support from a released consumer product. ([news.xbox.com](https://news.xbox.com/en-us/2024/xx.xx/xx.xx/how-idxbox-is-enabling-xx.xx-global-game-developers-to-realize-their-vision/))
328. Nightscape on Steam
   - Evidence informing base-year company-share estimates: Identifies Mezan as developer and publisher while keeping Nightscape unavailable for purchase, with demo and wishlist access. Together with the debut-project history, this supports the documented pre-commercial zero. ([store.steampowered.com](https://store.steampowered.com/app/xx.xx/Nightscape/))
329. Mezan Studios - Press Kit
   - Evidence informing base-year company-share estimates: The studio-authored history lists Nightscape as its project, providing the portfolio-continuity check used alongside the official unreleased storefront status. ([mezanstudios.com](https://mezanstudios.com/presskit/build/))
330. URK Studios - □□□□□ □□□□□ □□□□□□□ □□□ | □□□□□
   - Evidence informing base-year company-share estimates: Places 2025 at concept/planning, formation and development in June 2026, and the first project's intended early-access launch in 2027, supporting the pre-entry numerator of USD xx.xx. (urkstudios.com)
331. paibandstudio.com
   - Evidence informing base-year company-share estimates: The studio's dated update identifies April xx.xx 2026 as the release of its first project, supporting the boundary-derived 2025 pre-entry zero rather than an inference from founding alone.
332. Games - paibandstudio.com
   - Evidence informing base-year company-share estimates: The disclosed two-project portfolio dates Restore Your Island to April xx.xx 2026 and Escape By Spoon to 2027, corroborating the absence of a disclosed released commercial catalogue in 2025.
333. Restore Your Island on Steam
   - Evidence informing base-year company-share estimates: The storefront identifies the commercially continuous Paiband Game Studio developer name; it is not treated as a separate predecessor whose activity can be omitted.

334. Video gaming startup already has 4 million downloads. What's next for Chickmania?

· Evidence informing base-year company-share estimates: The February xx.xx 2022 nonprofit programme account reports more than xx.xx daily active users, four million downloads and six live games. The model uses xx.xx as a historical activity anchor, not an observed 2025 audience.

335. Jackaro - Apps on Google Play

· Evidence informing base-year company-share estimates: Jackaro's official listing identifies ChickMania, a one-million-plus cumulative Android installation threshold, advertising and in-app purchases. It supports the modeled revenue routes, not the assumed activity carry-forward or monetization yields.

336. Viscera Cleanup Detail on Steam

· Evidence informing base-year company-share estimates: The inspected page identifies RuneStorm as developer and publisher and displays xx.xx reviews in its latest xx.xx-day window, supporting a current activity proxy rather than observed 2025 sales.

· Evidence informing base-year company-share estimates: Two paid playable DLCs and the inclusion of Shadow Warrior and Santa's Rampage with the main purchase support portfolio scope and bundled-entitlement double-counting controls.

337. STASIS: BONE TOTEM on Steam

· Evidence informing base-year company-share estimates: The inspected STASIS: BONE TOTEM page identifies The Brotherhood as developer/publisher, displays xx.xx reviews in its latest xx.xx-day window and a USD xx.xx current price.

· Evidence informing base-year company-share estimates: These observations constrain activity, publishing role and the modeled price realization; they do not directly establish annual 2025 receipts.

338. Using Steam reviews to estimate sales - Grey Alien Games

· Evidence informing base-year company-share estimates: The May 2018 developer-contributed advisory study supplies a dated premium-indie purchasing/review calibration and discusses tentative genre differences; the modeled xx.xx-purchase coefficient is an assumption, not a Brotherhood observation.

· Evidence informing base-year company-share estimates: The post-2014 sample median of xx.xx purchases per purchase-associated review supports a dated calibration starting point; applying it to RuneStorm's current activity and calendar 2025 remains modeled.

339. The Brotherhood Games - Portfolio and News

· Evidence informing base-year company-share estimates: The studio portfolio identifies STASIS, STASIS: BONE TOTEM and BEAUTIFUL DESOLATION and dates STASIS's console arrival to June xx.xx 2025.

· Evidence informing base-year company-share estimates: This supports separate legacy-catalog and non-Steam scope adjustments, but does not measure their assumed numerical multipliers.

340. Warlordes - (Early Release) - Apps on Google Play

· Evidence informing base-year company-share estimates: Warlordes is listed under Hammer Games Limited with in-app purchases and a xx.xx-plus cumulative Android-download floor. The annual cohort and conversion rates are modeled, not disclosed.

341. Warlordes (Early Release) - App Store

· Evidence informing base-year company-share estimates: The official US listing provides December xx.xx 2024 initial-version history, 2025 updates, current USD xx.xx-xx.xx in-app offerings and an advertising label. These constrain timing and monetization assumptions, not observed 2025 revenue.

342. Hammer Games | Pioneering Distribution of African Games

· Evidence informing base-year company-share estimates: Hammer's own catalogue identifies Warlordes and Odogwu Hunter and labels Edge of Infinity forthcoming, retaining an unresolved timing conflict with the parent's launched-title description.

343. Hammer Games | Entertainment & Gaming | Ugarsoft Industries

· Evidence informing base-year company-share estimates: Ugarsoft's own business description identifies Hammer's publishing role and Quiva's development role, and describes Warlordes and Edge of Infinity as launched. It provides no annual sales and does not resolve the conflicting title chronology.

344. Afrique Créative - Livret de capitalisation, phase 3
    - Evidence informing base-year company-share estimates: The programme record reports a campaign acquiring xx.xx Kayfo players, a launched portal and diversification into advertising and B2B activity. The player count anchors the modeled monetizable cohort; reported net-income growth is not treated as sales growth.
345. Julien Herbin & Thierno Ndiaye - Afrique Créative
    - Evidence informing base-year company-share estimates: The programme profile describes Kayfo Play unlimited passes payable through Mobile Money. This supports an access-purchasing route, but not the modeled conversion rate or realized annual consideration.
346. Khhh! Games - Za-id and Studio Profile
    - Evidence informing base-year company-share estimates: The former Ard Games domain resolves to this continuing studio profile, which calls Za-id its debut game and first project and targets early 2027 release. This supports the 2025 pre-entry zero rather than relying on incorporation timing. (ardgames.com)
347. Za-id - Steam
    - Evidence informing base-year company-share estimates: Za-id's primary storefront states that the debut game is not yet available and offers wishlisting, corroborating the documented pre-commercial operating boundary used for the 2025 zero. ([store.steampowered.com](https://store.steampowered.com/app/xx.xx/))
348. UNCURSED on Steam
    - Evidence informing base-year company-share estimates: The retrieved listing identifies AJB as publisher, a February xx.xx 2025 release, xx.xx reviews and a current USD xx.xx price reference. Reviews and current price are model inputs, not annual sales.
349. Martha's Dolls on Steam
    - Evidence informing base-year company-share estimates: The inspected listing identifies AJB as publisher, a January xx.xx 2024 release, xx.xx reviews and a current USD xx.xx price reference for the modeled 2025 catalog bridge.
350. BOKKIE on Steam
    - Evidence informing base-year company-share estimates: The listing provides a June xx.xx 2024 release, xx.xx reviews and a current USD xx.xx price reference; the annual purchasing bridge remains assumed.
351. The Moroccan Castle 3 : Behind The Secrets on Steam
    - Evidence informing base-year company-share estimates: The listing provides a March xx.xx 2023 release, xx.xx reviews and a current USD xx.xx price reference for the older-catalog model component.
352. SuperGaming - We make games for the next billion players
    - Evidence informing base-year company-share estimates: The official portfolio identifies the Singapore/Pune business, approximately xx.xx cumulative installs, a September 2025 MaskGun milestone, and separate SuperPlatform services. These constrain scope and the modeled retained-player bridge, not annual sales.
353. Gameberry Labs | Makers of Ludo STAR & Parchisi STAR
    - Evidence informing base-year company-share estimates: The company reports six million daily game players and identifies its mobile-game portfolio. The daily audience supports the model input; its use as a 2025 annual average is an assumption.
354. Gameberry Labs - Rolling it right: profitable international gaming business
    - Evidence informing base-year company-share estimates: Gameberry's own fifth-anniversary communication reports approximately USD xx.xx ARR and USD xx.xx lifetime game revenue. These are historical scale anchors, not calendar-2025 revenue.
355. Video Gaming & Esports - JetSynthesys
    - Evidence informing base-year company-share estimates: The current portfolio reports xx.xx Sachin Saga daily users and more than two million Real Cricket daily users, while distinguishing game IP, partnerships and esports. Historical audience backcasts and monetization are modeled.
356. KRAFTON Strengthens India Investment Strategy with Acquisition of Nautilus Mobile
    - Evidence informing base-year company-share estimates: KRAFTON's March xx.xx 2025 announcement establishes acquisition of Nautilus control, supporting a pre-transfer rather than full-year JetSynthesys attribution for Real Cricket.

357. JetSynthesys confirms EverMerge acquisition from Big Fish Games
   · Evidence informing base-year company-share estimates: The February 2026 report corroborates the dated EverMerge acquisition announcement. No lifetime-revenue figure is used as a 2025 JetSynthesys numerator.
358. Our Mobile Games - Games2win Media
   · Evidence informing base-year company-share estimates: The company reports more than xx.xx cumulative downloads and xx.xx monthly players. The latter anchors the modeled purchasing and in-game advertising numerator, subject to a 2025 timing assumption.
359. Android Apps by LilithGames on Google Play
   · Evidence informing base-year company-share estimates: The publisher-maintained store description reports more than xx.xx worldwide players, a xx.xx-million-plus Rise of Kingdoms download threshold, and advertising/in-app purchasing. These support participation and monetization categories, not the modeled annual activity or spending rates.
360. Lilith Games - Official English Website
   · Evidence informing base-year company-share estimates: Lilith's official portfolio documents its broader game offerings and dated AFK Journey and Farlight activity, constraining the company/category boundary without establishing annual revenue.
361. IGG - 2025 Annual Results Presentation
   · Evidence informing base-year company-share estimates: Annual-results financial and business disclosures constrain approximately HKD xx.xx total revenue and HKD xx.xx APP Business revenue. Their rounded difference is the game-receipts proxy, not an observed final-buyer market share.
362. IGG - 2025 Annual Financial Highlights and 2026 Business Update
   · Evidence informing base-year company-share estimates: The issuer's March xx.xx 2026 annual-results release separates core game franchises from APP Business and corroborates the reported financial scale used in the game-only proxy.
363. YOOZOO Interactive Co., Ltd. - 2025 Annual Report
   · Evidence informing base-year company-share estimates: The audited report discloses 2025 PC-game revenue of CNY xx.xx, mobile-game revenue of CNY xx.xx and substantial joint-operation activity. These support the product-specific numerator and need for an explicit distribution bridge.
364. G-bits Network Technology (Xiamen) Co., Ltd. - 2025 Annual Report
   · Evidence informing base-year company-share estimates: The 2025 annual report separates autonomous, joint and authorized game-operation revenue and reports the change in deferred recharge/item balances. These are financial inputs to the modeled channel and purchasing bridge, not a directly observed market share.
365. Bilibili Inc. - Annual Results Announcement for the Year Ended December 31, 2025
   · Evidence informing base-year company-share estimates: The annual results announcement reports CNY xx.xx of game-line revenue and identifies exclusive and in-house game contributions. The company line anchors the purchasing model; the operating fraction and timing adjustment remain assumptions.
366. NEOWIZ Q4 2025 Earnings Results - February 10, 2026
   · Evidence informing base-year company-share estimates: Quarterly platform revenue rows, the rental/advertising classification, investment-property balances and platform-commission expense discussion constrain the NEOWIZ model. Channel, eligible-advertising, rental-yield and purchasing-timing adjustments are modeled rather than disclosed shares.
367. Com2uS - 2025 Business Report, filed March 20, 2026
   · Evidence informing base-year company-share estimates: The mandatory 2025 report separates KRW xx.xx gaming revenue from KRW xx.xx media/content revenue and identifies the consolidated gaming entities. These constrain scope; they do not directly establish the modeled retained-expenditure share.
368. Com2uS - 4Q25 and FY2025 Financial Results, February 12, 2026
   · Evidence informing base-year company-share estimates: Reports preliminary parent revenue of KRW xx.xx, commissions of KRW xx.xx and royalties of KRW xx.xx, supporting the company-specific commercial-cost proxy.

369. Kakao Games Announces 2025 Annual Results, February 11, 2026
· Evidence informing base-year company-share estimates: Reports approximately KRW xx.xx 2025 annual revenue and describes the company's refocusing on its core gaming business; supports the revenue anchor, not the assumed retained fraction.
370. Kakao Games Announces Second-Quarter 2025 Results, August 6, 2025
· Evidence informing base-year company-share estimates: Separates second-quarter 2025 mobile revenue of approximately KRW xx.xx and PC-online revenue of KRW xx.xx, constraining the modeled annual platform mix.
371. WEMADE - 4Q25 Earnings Presentation, February 2026
· Evidence informing base-year company-share estimates: Quarterly schedules provide game, license, blockchain and other revenue, plus revenue-linked commissions. The definition includes app-market fees and developer revenue shares; licensing concentration constrains the timing adjustment.
372. SHIFT UP - Stellar Deal Roadshow, February 2026
· Evidence informing base-year company-share estimates: Reports 2025 NIKKE revenue of KRW xx.xx and Stellar Blade revenue of KRW xx.xx, separately from other revenue, supporting the title-specific numerator anchor.
373. Devsisters - Summary Financial Information
· Evidence informing base-year company-share estimates: The official annual financial summary reports 2025 revenue of KRW xx.xx used instead of the earlier preliminary rounded annual amount.
374. Devsisters - Third-Quarter 2025 Report, filed November 14, 2025
· Evidence informing base-year company-share estimates: The nine-month 2025 filing separates games, royalties, advertising, goods and fund-management revenue. Its quarterly and cumulative amounts support the digital-game attribution and fourth-quarter mix proxy.
375. Devsisters - 2025 Annual Preliminary Results, February 9, 2026
· Evidence informing base-year company-share estimates: The annual announcement distinguishes digital-game performance from physical card-game and merchandise expansion, supporting exclusion of adjacent IP commercialization rather than treating all revenue as digital Gaming.
376. WEBZEN - FY2025 / 4Q25 Earnings Release, February 11, 2026
· Evidence informing base-year company-share estimates: Reports FY2025 game sales of KRW xx.xx, other revenue of KRW xx.xx and fees of KRW xx.xx; notes that game-sales categories include related IP income.
377. KOEI TECMO HOLDINGS - FY2025 Third-Quarter Data Appendix, January 26, 2026
· Evidence informing base-year company-share estimates: Provides April-December 2025 console/PC revenue of JPY xx.xx, online/mobile revenue of JPY xx.xx and goods revenue of JPY xx.xx, supporting the calendar-year reconstruction and scope exclusions.
378. KOEI TECMO HOLDINGS - FY2024 Annual Data Appendix
· Evidence informing base-year company-share estimates: Provides January-March 2025 console/PC revenue of JPY xx.xx, online/mobile revenue of JPY xx.xx and goods revenue of JPY xx.xx, completing the calendar-2025 bridge.
379. Federal Reserve - South Korean Won to U.S. Dollar Spot Exchange Rate, Annual
· Evidence informing base-year company-share estimates: The 2025 annual KRW/USD reference of xx.xx constrains the rounded KRW xx.xx/USD translation assumption; it does not establish company revenue or market share.
· Evidence informing base-year company-share estimates: Supports the period-consistent annual exchange-rate calibration used for the modeled Korean revenue numerator.
380. News - Page 5 | Pocketpair Inc.
· Evidence informing base-year company-share estimates: The dated February xx.xx 2025 news entry identifies Palworld's xx.xx-million cumulative-player milestone. It constrains the cohort model but does not disclose paid copies or annual revenue.
381. Game News - News List | Pocketpair Inc.
· Evidence informing base-year company-share estimates: The July xx.xx 2026 dated entry identifies xx.xx total Palworld players, providing a retrospective cumulative constraint rather than a calendar-2025 sales observation.

382. Sony Music Entertainment (Japan), Aniplex, and Pocketpair Announce Joint Venture, Palworld Entertainment, Inc., to Expand the Breakout Game, Palworld

· Evidence informing base-year company-share estimates: Identifies Pocketpair as Palworld's creator, producer and publisher and states that the Sony/Aniplex joint venture concerns commercial activities outside the interactive game, supporting exclusion of merchandise and separate joint-venture receipts.

383. ファンタジーライフ シリーズ - Dated News Archive

· Evidence informing base-year company-share estimates: The official dated series news archive records the December xx.xx 2025 Fantasy Life i milestone of xx.xx cumulative units; sell-through and realized purchasing remain modeled.

384. NEWS | INAZUMA ELEVEN: Victory Road - January 13, 2026

· Evidence informing base-year company-share estimates: Reports xx.xx worldwide digital copies of Inazuma Eleven: Victory Road through January xx.xx 2026 following its November 2025 release; the xx.xx-copy calendar attribution is assumed.

385. FANTASY LIFE i: The Girl Who Steals Time - Official Product Page

· Evidence informing base-year company-share estimates: Lists the 2025 console/PC release and USD xx.xx standard-edition reference price, constraining but not directly establishing the USD xx.xx modeled global realization.

386. INAZUMA ELEVEN: Victory Road - Official Product Page

· Evidence informing base-year company-share estimates: Lists the November 2025 release and USD xx.xx standard-edition reference price, constraining the assumed USD xx.xx realized purchasing value.

387. NHN PlayArt / LEVEL5 - April 10, 2026 Press Release

· Evidence informing base-year company-share estimates: The jointly issued release identifies NHN PlayArt/LEVEL5 collaboration and Puni Puni's more-than-xx.xx-million cumulative-download milestone in April 2026. Active users, payers and the 2025 backcast are modeled.

388. MIXI FY2026 Q4 Financial Results Briefing Materials

· Evidence informing base-year company-share estimates: The Digital Entertainment quarterly table supports calendar-2025 receipts of JPY xx.xx. Separate Sports, Lifestyle and Investment reporting supports exclusion of betting and other nongaming group activity; the xx.xx% game attribution remains assumed.

389. Marvelous Inc. - Consolidated Financial Results for the Fiscal Year Ended March 31, 2025

· Evidence informing base-year company-share estimates: Reports fiscal-March-2025 Digital Contents sales of JPY xx.xx, separately from Amusement sales of JPY xx.xx and Audio & Visual sales of JPY xx.xx, supporting the calendar and scope bridge.

390. Marvelous Inc. - Consolidated Financial Results for the Nine Months Ended December 31, 2025

· Evidence informing base-year company-share estimates: Reports April-December Digital Contents receipts of JPY xx.xx for 2024 and JPY xx.xx for 2025, enabling the exact calendar-2025 segment reconstruction before modeled retail and scope adjustments.

391. COLOPL, Inc. - Consolidated Financial Results for the Fiscal Year Ended September 30, 2025

· Evidence informing base-year company-share estimates: Reports Entertainment revenue of JPY xx.xx versus JPY xx.xx previously and separately identifies investment activity. The Dragon Quest Walk development role supports a modeled exclusion of partner-development receipts, not an observed xx.xx% split.

392. VNG Annual Report 2025 - Games & Entertainment

· Evidence informing base-year company-share estimates: Reports 2025 Games revenue of VND xx.xx and bookings of VND xx.xx, defining bookings as user cash spending. Supports the purchasing numerator before assumed tax/refund and currency adjustments.

· Evidence informing base-year company-share estimates: Reports VNG's xx.xx-million quarterly active users, xx.xx% paying ratio and VND xx.xx-billion bookings, providing the regional commercial calibration. It does not observe Funtap's revenue or monetization.

393. Funtap - About Us

· Evidence informing base-year company-share estimates: Reports xx.xx monthly active users and more than xx.xx cumulative players. Only MAU is used as an activity anchor, with an explicit 2025 backcast; cumulative players and title counts are not revenue weights.

394. Amanotes - Everyone Can Music
· Evidence informing base-year company-share estimates: The official site reports more than xx.xx monthly active users. This supplies a reach anchor, not observed calendar-2025 revenue or monetization rates.

395. Gameloft for brands and Amanotes team up to elevate in-game advertising opportunities with COMBO! The Gaming Media Network
· Evidence informing base-year company-share estimates: Gameloft's January xx.xx 2025 announcement establishes its COMBO advertising partnership with Amanotes. Partnership existence does not establish campaign receipts or incremental growth.

396. Amanotes Privacy Policy
· Evidence informing base-year company-share estimates: The April 2025 privacy-policy version describes purchases and advertising relationships, supporting the modeled monetization categories but not their assumed conversion rates.

397. Toge Productions - Official Company and Game Portfolio
· Evidence informing base-year company-share estimates: Toge's own portfolio identifies its development and publishing role and named consumer games used in the catalog model. Portfolio inclusion does not establish annual title sales.

398. Whisper Mountain Outbreak - Official Developer News on Steam
· Evidence informing base-year company-share estimates: Toge's game-news announcement reports Whisper Mountain Outbreak passing xx.xx copies. The inspected announcement is in the March 2026 sequence; allocation of xx.xx purchases to 2025 is modeled, not reported.

399. PT Megaxus Infotech Newsletter - October 2020, No. 0310.2020
· Evidence informing base-year company-share estimates: The October 2020 company newsletter reports xx.xx registered users. This is a dated cumulative-account anchor, not an active-user or annual-revenue observation.

400. Asphere Innovations Reports Revenue Growth in 2025, Driven by Core Games and Business Expansion
· Evidence informing base-year company-share estimates: Asphere reports THB xx.xx total 2025 revenue, growth in PlayPark Services and higher licensing costs. These constrain the financial bridge but do not disclose the modeled qualifying or retained percentages.

401. Asphere Innovations Public Company Limited - Annual Report 2024
· Evidence informing base-year company-share estimates: The audited 2024 report identifies online-game revenue, THB xx.xx monthly royalty expense and prepaid-consideration recognition. It supports licensing and timing adjustments rather than direct equivalence between group revenue and buyer expenditure.

402. Ranida Games - Basketball Slam MyTEAM Preregistration Announcement
· Evidence informing base-year company-share estimates: Ranida's own MyTEAM announcement reports more than xx.xx global predecessor downloads. The model's active audience is an assumption derived from this historical stock, not a reported activity measure.

403. Ranida Games - Official Services and Game Portfolio
· Evidence informing base-year company-share estimates: Ranida explicitly offers advertising placements inside its mobile games and identifies its consumer portfolio, supporting the commercial categories used rather than the assumed revenue yields.

404. iCandy Interactive Limited - Preliminary Final Report for the Year Ended December 31, 2024
· Evidence informing base-year company-share estimates: Note xx.xx reports unaudited 2024 application sales, advertising/sponsorship and publishing income separately from game-production and animation services. Only the first categories enter the provisional numerator bridge.

405. iCandy Interactive Limited - Financial Results and Audit Update, March 21, 2025
· Evidence informing base-year company-share estimates: The March xx.xx 2025 financial-results and audit update identifies potential improper external conduct. It limits reliance on the provisional financial anchor rather than verifying it.

406. iCandy Interactive Limited - Corporate and Operational Update, November 10, 2025
· Evidence informing base-year company-share estimates: The November 2025 operational update distinguishes external service work from an internal Metal Genesis playtest. It does not establish a commercial consumer launch or sales amount for that project.

407. iCandy Interactive - Shareholder Update, May 2026
   - Evidence informing base-year company-share estimates: The May 2026 shareholder update says FY2024 and FY2025 financial-statement audits remained outstanding, preserving a material verification limitation on the modeled financial bridge.
408. GigaBash on Steam
   - Evidence informing base-year company-share estimates: Identifies Passion Republic Games as developer and publisher, records the 2022 release and displayed 1972 cumulative reviews at retrieval. Reviews are a post-base-year model anchor, not observed annual sales.
409. Passion Republic Games - GigaBash and Additional Content
   - Evidence informing base-year company-share estimates: Documents GigaBash and additional-content purchasing routes, distinguishing free MechaJURAS content from purchasable offerings. It does not disclose sales or attachment rates.
410. Postknight - Apps on Google Play
   - Evidence informing base-year company-share estimates: The publisher listing reports xx.xx-plus cumulative Google Play downloads and advertising/in-app purchases. The annual active cohort and monetization bridge remain modeled.
411. Postknight 2 - Apps on Google Play
   - Evidence informing base-year company-share estimates: The publisher listing reports xx.xx-plus cumulative Google Play downloads and advertising/in-app purchases; it does not report calendar-2025 revenue.
412. Tiny Guardians - Apps on Google Play
   - Evidence informing base-year company-share estimates: Establishes the separately listed Tiny Guardians offering. The modeled annual copies and realized purchasing amount are not observations from this listing.
413. Gamania Digital Entertainment - 2025 Annual & Q4 Operating Report
   - Evidence informing base-year company-share estimates: Reports calendar-2025 Game segment revenue of TWD xx.xx versus TWD xx.xx in 2024, separately from commerce and other activities. Supports the segment anchor, not the modeled expenditure bridge.
414. Soft-World International Corporation - 2025 Q4 Consolidated Financial Statements
   - Evidence informing base-year company-share estimates: Audited 2025 external revenues are TWD xx.xx for Chinese Gamer and TWD xx.xx for Game Flier/Game First. Agency accounting separates MyCard from independently attributable consumer purchases.
415. X-LEGEND - 2026 Investor Conference Presentation
   - Evidence informing base-year company-share estimates: Reports 2025 net sales of TWD xx.xx and distinguishes development, licensing/co-development and publishing activities. Does not disclose the modeled xx.xx% operating attribution or xx.xx% retention.
416. Halfbrick Studios: Slicing into the gaming market with Google Cloud
   - Evidence informing base-year company-share estimates: Quotes Halfbrick's CFO on approximately 2020 daily activity for Fruit Ninja, Jetpack Joyride and Dan the Man. Only the company's dated operating statements are used; third-party market-research figures on the page are excluded.
417. Changes are coming to Halfbrick+
   - Evidence informing base-year company-share estimates: The April xx.xx 2024 announcement establishes transition to paid Halfbrick+ access. Subscriber counts and annual realization in the model are assumptions.
418. Bluey's Quest For The Gold Pen Video Game Arrives December!
   - Evidence informing base-year company-share estimates: The rights holder's announcement identifies Halfbrick's Bluey's Quest for the Gold Pen offering for December 2025 and distinguishes later platform releases. It does not disclose purchases.
419. SILKSONG EXPANSION, HOLLOW KNIGHT REFRESHED, AND MORE! - Team Cherry
   - Evidence informing base-year company-share estimates: Reports more than seven million Silksong purchases by December xx.xx 2025, separately from Game Pass players; supports the paid-unit anchor, not modeled prices, year-end units or legacy sales.

420. PlaySide Studios Limited - Appendix 4E and Annual Report 2025
· Evidence informing base-year company-share estimates: Audited FY2025 revenue note separates AUD xx.xx Original IP, AUD xx.xx Publishing and AUD xx.xx work-for-hire; publishing policy identifies net platform-fee treatment.

421. Atari Acquires Mobile Developer Hipster Whale, Studio Behind Popular Crossy Road Franchise
· Evidence informing base-year company-share estimates: Atari's issuer announcement reports unaudited Hipster Whale revenue of USD xx.xx for the twelve months ended January xx.xx 2026; this is a near-calendar supplier-revenue proxy, not observed 2025 buyer spending.

422. Hipster Whale - Press Kit
· Evidence informing base-year company-share estimates: Identifies Hipster Whale's development/publishing role, Crossy Road portfolio and partner-title relationships; supports the need to separate standalone purchasing from licensing and partner receipts.

423. Rival Stars Horse Racing - Google Play
· Evidence informing base-year company-share estimates: The inspected Rival Stars Horse Racing listing identifies PikPok, advertising, in-app purchases and a cumulative xx.xx-million-plus Android download threshold; it does not establish 2025 active users or sales.

424. Into the Dead 2: Zombie Killer - Google Play
· Evidence informing base-year company-share estimates: The inspected Into the Dead xx.xx listing identifies PikPok, advertising, in-app purchases and a cumulative xx.xx-million-plus Android download threshold, constraining installed reach rather than annual monetization.

425. Clusterduck - Google Play
· Evidence informing base-year company-share estimates: The inspected Clusterduck listing identifies PikPok, advertising, in-app purchases and a cumulative xx.xx-million-plus Android download threshold; annual activity and spending remain modeled.

426. Dev Update #23: One Hundred Thousand - Into the Dead: Our Darkest Days, Steam Community Announcement
· Evidence informing base-year company-share estimates: PikPok's May xx.xx 2024 developer announcement reports xx.xx Our Darkest Days Steam wishlists; supports a prospective audience anchor, not observed paid conversion or 2025 unit sales.

427. Mini Motorways' New "Spires and Tires" Update Revels in Copenhagen's Greenery Today
· Evidence informing base-year company-share estimates: Company-issued March 2025 release identifies more than nine million lifetime Mini Motorways players and Apple Arcade, Steam and Switch routes; player count is not treated as paid units.

428. Mini Motorways - Dinosaur Polo Club Press Kit
· Evidence informing base-year company-share estimates: Studio press kit lists standalone Steam and Switch prices and a distinct Apple Arcade route, supporting separate treatment of premium purchases and library licensing.

429. Mini Metro - Dinosaur Polo Club Press Kit
· Evidence informing base-year company-share estimates: Studio press kit lists Mini Metro desktop/console and lower-priced mobile offerings; constrains the modeled blended purchasing value without establishing annual units.

430. Game District Passes 2.2 Billion Downloads Worldwide in 2025 - Issuer Press Release
· Evidence informing base-year company-share estimates: Issuer release reports xx.xx 2025 downloads and xx.xx peak DAU. These constrain the activity model; average activity, monetization and economic attribution remain assumptions.

431. Highbit Technologies - Life Is Short, Play More Games
   - Evidence informing base-year company-share estimates: The disclosed xx.xx-million monthly audience against xx.xx-million-plus downloads supplies a comparative activity ratio; the lower Game Storm retention coefficient remains assumed. (highbitsol.com)
   - Evidence informing base-year company-share estimates: Reports xx.xx monthly active users, xx.xx-plus downloads and more than xx.xx launched games; these anchor activity, not annual sales. (highbitsol.com)
   - Evidence informing base-year company-share estimates: Provides the disclosed xx.xx% activity-to-download comparator used to qualify Sablo's assumed xx.xx% ratio. (highbitsol.com)
   - Evidence informing base-year company-share estimates: Provides a comparative activity ratio, not an observed Yarsa audience or monetization rate. (highbitsol.com)
432. The Game Storm Studios
   - Evidence informing base-year company-share estimates: Discloses a broad published-game portfolio and one-billion-plus cumulative downloads; the model does not treat these as annual users or include listed nongame utilities automatically. (thegamestormstudios.com)
433. Gaming - Pakistan Software Export Board Industry Roundup
   - Evidence informing base-year company-share estimates: The early-2025 company profile reports xx.xx-plus published games and more than one billion downloads; only company-specific commercial disclosures are used, not the publication's external market estimates. ([techdestination.com](https://techdestination.com/wp-content/uploads/2025/xx.xx/Gaming_For_Web.pdf))
   - Evidence informing base-year company-share estimates: The Highbit profile repeats xx.xx monthly users and xx.xx-million-plus downloads near the base year; it is not independent verification of the underlying company disclosure. ([techdestination.com](https://techdestination.com/wp-content/uploads/2025/xx.xx/Gaming_For_Web.pdf))
434. Dig Tycoon - Idle Game 3D - Apps on Google Play
   - Evidence informing base-year company-share estimates: Lists Sablo as publisher, advertising and optional purchases, and a cumulative xx.xx-million-plus download threshold for Dig Tycoon. ([play.google.com](https://play.google.com/store/apps/details?id=com.sablostudio.dig.tycoon.idle.game))
435. Oil Mining 3D - Petrol Factory - Apps on Google Play
   - Evidence informing base-year company-share estimates: Lists Sablo's Oil Mining game with a five-million-plus cumulative download threshold and advertising/optional purchases. ([play.google.com](https://play.google.com/store/apps/details?id=com.sablostudio.oil.mining))
436. Matches Craft - Idle Game - Apps on Google Play
   - Evidence informing base-year company-share estimates: Shows one-million-plus cumulative downloads, advertising, optional purchases and an October 2025 update for Matches Craft. ([play.google.com](https://play.google.com/store/apps/details?hl=en_US&id=com.sablostudio.matches.craft.idle.game))
437. Construction ASMR - Apps on Google Play
   - Evidence informing base-year company-share estimates: Shows one-million-plus cumulative downloads and advertising/optional purchases for Sablo's Construction ASMR. ([play.google.com](https://play.google.com/store/apps/details?id=com.construction.asmr))
438. Wood Chopper: Lumber Empire - Apps on Google Play
   - Evidence informing base-year company-share estimates: Shows xx.xx-plus cumulative downloads for Wood Chopper, one component of the retrieved portfolio floor. ([play.google.com](https://play.google.com/store/apps/details?id=com.ss.wood.chopper.lumber.empire))
439. Train Digger - Idle Game - Apps on Google Play
   - Evidence informing base-year company-share estimates: Shows xx.xx-plus cumulative downloads for Train Digger, completing the six-title xx.xx-million threshold sum. ([play.google.com](https://play.google.com/store/apps/details?id=com.ss.traindigger))

440. Sablo Studio - Mobile Game Developer & Publisher
    - Evidence informing base-year company-share estimates: Separates mobile publishing from playable/video advertising production, supporting exclusion of production-service fees. (sablostudio.com)
441. Tokyo Game Show 2026 - Pakistan Game Pavilion
    - Evidence informing base-year company-share estimates: Mentions more than USD xx.xx revenue without an accounting period or gross/net basis; the research explicitly rejects treating it as observed 2025 expenditure. ([techdestination.com](https://techdestination.com/tokyo-game-show-2026/))
442. Connect Ball- Line Puzzle Game - Apps on Google Play
    - Evidence informing base-year company-share estimates: Identifies Duolabz FZC, advertising, xx.xx-plus cumulative downloads and an October xx.xx 2025 update for Connect Ball. ([play.google.com](https://play.google.com/store/apps/details?hl=en_US&id=com.connect.ball.line.puzzle.game))
443. Coloring Book & ASMR Drawing - Apps on Google Play
    - Evidence informing base-year company-share estimates: Shows Duolabz's advertising/optional-purchase game and a current xx.xx-plus download threshold; its 2025 contribution is backcast, not observed. ([play.google.com](https://play.google.com/store/apps/details?id=com.duolabzfzc.color.asmr))
444. Yarsa Games - Game Studio from Nepal
    - Evidence informing base-year company-share estimates: Reports xx.xx-million-plus cumulative downloads and identifies xx.xx users as a 2025 expectation, not an achieved observation. ([yarsagames.com](https://www.yarsagames.com/))
445. Ludo - Apps on Google Play
    - Evidence informing base-year company-share estimates: The principal Ludo listing confirms Yarsa's publishing relationship, a xx.xx-million-plus cumulative threshold, advertising and optional purchases; it does not establish 2025 annual activity. ([play.google.com](https://play.google.com/store/apps/details?hl=en_US&id=io.yarsa.games.ludo))
446. Tap Tap Ants - Action, Arcade and Fun Game - Riseup Labs
    - Evidence informing base-year company-share estimates: Identifies Tap Tap Ants and reports more than xx.xx cumulative downloads, the mature stock anchor rather than an annual audience. ([riseuplabs.com](https://riseuplabs.com/tap-tap-ants/))
447. Tap Tap Ants App - App Store
    - Evidence informing base-year company-share estimates: Shows Rise Up Labs as seller, 2025 updates, advertising and optional purchases including USD xx.xx-xx.xx offers; these are price/continuity anchors, not annual sales. ([apps.apple.com](https://apps.apple.com/us/app/tap-tap-ants/id348839552))
448. Portfolio - Beyond the Limits of Visualization - Riseup Labs
    - Evidence informing base-year company-share estimates: Distinguishes owned games, including the Tap Tap Ants family, from client work; supports excluding commissioned production fees from final-buyer gaming expenditure. ([riseuplabs.com](https://riseuplabs.com/portfolio))
449. Mobile Legends: Bang Bang leads MOONTON Games' four-award sweep at The GamingonPhone Awards 2025
    - Evidence informing base-year company-share estimates: The October xx.xx 2025 company announcement reports xx.xx monthly active MLBB players and identifies additional released mobile games.
    - Evidence informing base-year company-share estimates: These constrain the operating audience and portfolio bridge, not the assumed paying conversion or final modeled share.
450. Sea Limited - Q1 2025 Earnings Update
    - Evidence informing base-year company-share estimates: First-quarter 2025 digital-entertainment bookings of USD xx.xx, xx.xx quarterly active users and xx.xx quarterly paying users provide the mobile free-to-play monetization comparator.
    - Evidence informing base-year company-share estimates: The comparator is adjusted explicitly for MOONTON's period, reach and monetization differences; it is not MOONTON revenue.

451. Resolution Games Reports Record Company Growth and Player Revenue for FY2021
   - Evidence informing base-year company-share estimates: The company's July xx.xx 2022 release supplies a historical FY2021 commercial-scale anchor, including combined B2C/B2B revenue.
   - Evidence informing base-year company-share estimates: It supports only the dated benchmark; consumer allocation, distribution retention and the 2025 release-cohort bridge remain modeled.
452. Resolution Games - All Press Releases
   - Evidence informing base-year company-share estimates: The company archive identifies dated releases and continuing updates, including Demeo Battles, Racket Club, Spatial Ops and the November 2025 Battlemarked launch.
   - Evidence informing base-year company-share estimates: Release participation supports the modeled cohort boundary, not the assumed transaction volume.
453. Resolution Games - What Demeo platforms have cross-play?
   - Evidence informing base-year company-share estimates: The Demeo cross-play guidance distinguishes supported participation platforms and continuing access conditions.
   - Evidence informing base-year company-share estimates: It supports counting purchases independently of the number of compatible platforms, without assuming a cross-play sales uplift.
454. Resolution Games - Is there cross-buy?
   - Evidence informing base-year company-share estimates: The dated cross-buy guidance states that an Oculus Store purchase does not provide the Steam version.
   - Evidence informing base-year company-share estimates: This constrains entitlement attribution but does not measure repurchase incidence or incremental revenue.
455. Digital Alpha Becomes Strategic Investor in Blacknut to Accelerate the Global Growth of Cloud Gaming
   - Evidence informing base-year company-share estimates: Blacknut reports more than three million subscribers in its August xx.xx 2026 announcement.
   - Evidence informing base-year company-share estimates: This is a later subscriber-stock anchor for the explicit 2025 backcast; the announced investment is not treated as revenue.
456. GTPL Hathway Limited - Q3 FY2025 Earnings Call Transcript, January 10, 2025
   - Evidence informing base-year company-share estimates: The January xx.xx 2025 operator transcript reports approximately xx.xx gaming subscribers following the Blacknut launch, distinct from the broader app-user base.
   - Evidence informing base-year company-share estimates: This independently establishes a dated operator-channel activity anchor, not global subscriber conversion or revenue.
457. Unprecedented Subscription Offer From Boosteroid
   - Evidence informing base-year company-share estimates: The November xx.xx 2024 company offer states EUR xx.xx monthly-equivalent annual pricing, EUR xx.xx monthly pricing and continued eligibility while subscribed.
   - Evidence informing base-year company-share estimates: The same announcement reports more than six million users; prices and reach constrain the model but do not establish 2025 paid subscribers.
458. Boosteroid leadership honored with Gold, Silver, and Grand Stevie Awards at the 22nd International Business Awards
   - Evidence informing base-year company-share estimates: The October 2025 company announcement reports more than xx.xx users.
   - Evidence informing base-year company-share estimates: This supplies a dated reach constraint; user reach is not treated as an observed average paid subscriber count.
459. A Heroic Ten Years: Special letter from our CEO
   - Evidence informing base-year company-share estimates: The founder distinguishes Heroic Labs' infrastructure business from its abandoned game-studio concept and attributes nearly USD xx.xx to games using its technology, not to Heroic Labs' annual revenue.
460. About Heroic Labs, Nakama, Hiro and Satori
   - Evidence informing base-year company-share estimates: The documented Nakama, Hiro, Satori and Heroic Cloud portfolio supports exclusion of developer software and infrastructure from the final-buyer Gaming numerator.

461. AccelByte and KRAFTON Team Up to Power the Next Generation of Games
   · Evidence informing base-year company-share estimates: The April xx.xx 2025 KRAFTON partnership identifies backend services and developer tooling supplied to studios, supporting the excluded-business classification rather than attribution of KRAFTON game sales.
462. Fast Travel Games - About
   · Evidence informing base-year company-share estimates: The company reports xx.xx Elements Divided units during its first six months and describes continuing first-party development and third-party publishing; these constrain the unit-and-catalog purchasing model, not the final percentage directly.
463. The Midnight Walk Sells 100,000 Units on Steam, PlayStation 5 and VR
   · Evidence informing base-year company-share estimates: The September xx.xx 2025 report corroborates the dated announcement of xx.xx The Midnight Walk sales; the annual unit bridge and realized price remain modeled.
464. Aonic AB - Annual Report 2025
   · Evidence informing base-year company-share estimates: The 2025 report provides EUR xx.xx Games revenue, including EUR xx.xx point-in-time digital goods/licences and EUR xx.xx services, and separately identifies contract development and Tech activities. Exclusion and retail-conversion parameters remain assumptions.
465. "Last year we were the 'Manor Lords publisher', this year I think we're something more": Heroes of Might and Magic company sold over 4.5 million copies two years in a row
   · Evidence informing base-year company-share estimates: The December 2025 article corroborates the CEO's dated announcement of more than xx.xx portfolio copies sold during the preceding twelve months; it does not establish audited calendar revenue or the modeled USD xx.xx realization.
466. Ziff Davis, Inc. Form 10-K - Year Ended December 31, 2025
   · Evidence informing base-year company-share estimates: The 2025 filing reports USD xx.xx of Gaming & Entertainment subscription/licensing revenue, separately from advertising, and describes game, ebook and software commerce. It supports the modeled scope bridge, not the assumed gaming mix or retained-commerce rate.
467. Creepy Jar summarises 2025 and announces a record dividend
   · Evidence informing base-year company-share estimates: Creepy Jar reports PLN xx.xx of 2025 net sales and xx.xx copies on specified platforms. The stated revenue-mix percentages sum to xx.xx%, leaving an unresolved discrepancy; the estimate uses aggregate sales instead.
468. Slitherine Software: doubling turnover in 12 months with Business Surrey's support
   · Evidence informing base-year company-share estimates: The local-government business case reports more than two million games sold in 2024, a xx.xx-title catalog and forecast GBP xx.xx turnover, while distinguishing gaming and defence activity. These constrain the consumer-volume model; the turnover forecast is not realized 2025 revenue.
469. About - Slitherine
   · Evidence informing base-year company-share estimates: The official commercial description establishes strategy-game development and publishing activity. It supports the included-offering boundary, not the estimated 2025 units, prices or retention.
470. HyperX Kicks Off 2020 with All-New PC and Console Gaming Lineup at CES
   · Evidence informing base-year company-share estimates: The release dated January xx.xx 2020 provides the ten-million-headset shipping milestone used only as a historical scale proxy. Third-party market-share statements in the release are not used.
471. HyperX Achieves 20 Million Gaming Headsets Shipping Milestone
   · Evidence informing base-year company-share estimates: The company announcement dated October xx.xx 2021 reports more than twenty million cumulative gaming-headset shipments. It is not an observed 2025 annual shipment count.
472. HP Inc. to Acquire HyperX
   · Evidence informing base-year company-share estimates: HP's acquisition announcement identifies the gaming-peripheral portfolio and states that Kingston retained DRAM, flash and SSD products. It supports the product-scope exclusions, not the estimated 2025 revenue.

473. GN Annual Report 2025 - Company Announcement and Financial Overview
   · Evidence informing base-year company-share estimates: The financial overview separately reports DKK xx.xx of Gaming revenue and negative DKK xx.xx for the Consumer wind-down line. The Gaming row is the numerator anchor; translation and expenditure attribution remain modeled.
474. Enshrouded Hits THREE MILLION PLAYERS!
   · Evidence informing base-year company-share estimates: The August 2024 announcement reports three million cumulative Enshrouded players, establishing a dated commercial activity milestone rather than annual sales.
475. 4M Flameborn + Update 6 teaser
   · Evidence informing base-year company-share estimates: The April 2025 announcement reports four million cumulative players and constrains the timing bridge without establishing paid-license conversion or realized prices.
476. Enshrouded Reveals 1.0 Release Window During Early Access Second Anniversary Celebration
   · Evidence informing base-year company-share estimates: The developer's January 2026 press announcement reports more than five million cumulative players. The model applies an explicit calendar-year and paid-equivalent adjustment rather than treating the milestone as 2025 unit sales.
477. Enshrouded - Official Steam Store Listing
   · Evidence informing base-year company-share estimates: The official storefront identifies Keen's Enshrouded developer/publisher role. It does not disclose calendar-2025 revenue or verify the modeled realized purchase value.
478. Skybound Holdings LLC - Form 1-K for the Year Ended December 31, 2025
   · Evidence informing base-year company-share estimates: The 2025 annual filing reports Interactive revenue of USD xx.xx and cost of revenue of USD xx.xx, and distinguishes publishing/distribution entities from IP licensing. These inputs support the modeled retained-contribution proxy, not an observed final-buyer market share.
479. THEORYCRAFT GAMES
   · Evidence informing base-year company-share estimates: The company's retrospective SUPERVIVE disclosure reports more than two million global players. It constrains cumulative commercial reach but does not establish 2025 annual active players, payers or receipts.
480. SUPERVIVE on Steam
   · Evidence informing base-year company-share estimates: The product listing identifies Theorycraft Games and NetEase Games in the publishing relationship, supporting a separate partner-attribution adjustment rather than assigning the entire title's global purchasing automatically to Theorycraft.
481. AEXLAB, Inc. - Form C/A Offering Statement Amendment
   · Evidence informing base-year company-share estimates: The amended filing reports most-recent fiscal-year sales of USD xx.xx and prior-year sales of USD xx.xx. These are operating-scale inputs to the 2025 model, not financing proceeds or an observed 2025 share.
482. VAIL VR (Part One): From Couch Surfing to $15M in Crowdfunding
   · Evidence informing base-year company-share estimates: The December xx.xx 2025 platform case history describes VAIL's premium launch and subsequent hybrid monetization transition. It motivates opposing activity and realization assumptions without measuring their numerical magnitude.
483. 2025 in review: From holding the line to a record year
   · Evidence informing base-year company-share estimates: The company reports EUR xx.xx revenue for 2025, EUR xx.xx from TrainStation xx.xx and nearly EUR xx.xx from TrainStation xx.xx during its first seven months. These constrain the game-business numerator; currency translation and final-buyer retention remain modeled.
484. Turtle Beach Corporation Form 10-K - Year Ended December 31, 2025
   · Evidence informing base-year company-share estimates: Audited 2025 net revenue of USD xx.xx and the consolidated gaming-accessory portfolio anchor the retail-spending model. The xx.xx% scope attribution, xx.xx% retention and neutral inventory bridge are assumptions, not filing observations. Externally sourced market-size and leadership claims in the filing are not used.

485. Friday Facts #372 - 2022 recap
   · Evidence informing base-year company-share estimates: The 2022 recap reports approximately xx.xx annual Factorio sales, xx.xx cumulative sales and a continuing no-sale policy. These are dated inputs to the modeled 2025 unit bridge, not observed 2025 sales.
486. Game purchase - Factorio
   · Evidence informing base-year company-share estimates: Establishes direct website purchasing, direct downloads and subsequent Steam-key redemption, supporting the rule that activation through two routes is not two purchases.
487. Space Age purchase - Factorio
   · Evidence informing base-year company-share estimates: Establishes a separately purchased Space Age expansion requiring base-game ownership, with direct-download and Steam-redemption relationships; it does not disclose annual expansion units.
488. The Worldwide Tic Tac Toe Championship is relaunching to 100 Million Players with FRVR Partnership
   · Evidence informing base-year company-share estimates: FRVR's April 2026 announcement describes an audience exceeding xx.xx players. The model uses this only as a reach constraint; 2025 active relationships and monetization remain explicit assumptions.
489. About FRVR - Instant Games for Everyone, Everywhere
   · Evidence informing base-year company-share estimates: Distinguishes instant-game publishing and distribution from Upit creation tools and documents the business's distribution timeline; creation-tool revenue is excluded from the Gaming numerator.
490. VRChat anniversary - Official VRChat information page
   · Evidence informing base-year company-share estimates: Records xx.xx simultaneous users during the New Year's celebration preceding the January-2025 anniversary. Annual average activity and payer conversion are modeled rather than observed.
491. VRC+ - VRChat
   · Evidence informing base-year company-share estimates: Establishes the VRC+ monetized feature offering, but does not disclose calendar-2025 subscribers, paid conversion or realized revenue; the model's annual realization is an assumption.
492. INTRODUCING ATIA'S LEGACY - THE AXIE MMO
   · Evidence informing base-year company-share estimates: The March xx.xx 2025 announcement reports xx.xx monthly active players and distinguishes Atia's Legacy preregistration from a released paid offering. The model uses the audience observation, not cumulative NFT trading volume. ([blog.axieinfinity.com](https://blog.axieinfinity.com/p/introducing-atias-legacy))
493. Axie Gem Store - Sky Mavis
   · Evidence informing base-year company-share estimates: The official support article identifies Gems as an off-chain purchasing resource. Its linked store illustration shows xx.xx Gems for xx.xx USDC, supporting the modeled purchase-ticket anchor but not annual sales or payer conversion. ([support.axieinfinity.com](https://support.axieinfinity.com/hc/en-us/articles/xx.xx/))
494. Axie Classic Competitive Season 10 is LIVE!
   · Evidence informing base-year company-share estimates: The July xx.xx 2025 announcement distinguishes free Battle Passes from Premium Passes costing xx.xx Gems. It establishes a dated paid-entitlement offer, not purchasing volume. ([blog.axieinfinity.com](https://blog.axieinfinity.com/p/axie-classic-competitive-season-xx.xx))
495. Introducing: The Origins Shop!
   · Evidence informing base-year company-share estimates: The shop announcement identifies primary Gem purchases and a xx.xx% Origins-vault/xx.xx% community-treasury allocation. These are proceeds allocations, not independently additive buyer transactions. ([blog.axieinfinity.com](https://blog.axieinfinity.com/p/origins-shop-is-live))

496. The Next Chapter of Axie Governance: The Foundation, The Treasury, and Your Voice
   · Evidence informing base-year company-share estimates: The August xx.xx 2025 announcement distinguishes the proposed independent foundation and community treasury from Sky Mavis. Treasury holdings are stocks containing mixed economic sources, not a company annual primary-sales numerator. ([blog.axieinfinity.com](https://blog.axieinfinity.com/p/the-next-chapter-of-axie-governance))
497. Gods Unchained - Battle Pass Season 2
   · Evidence informing base-year company-share estimates: The official announcement reports more than xx.xx Season-xx.xx matches and lists Season-xx.xx paid tracks at USD xx.xx and USD xx.xx, with a USD xx.xx collector presale price. It also discloses token rewards that limit inference from headline prices to net external purchasing. ([portal.godsunchained.com](https://portal.godsunchained.com/blog/battle-pass-season-xx.xx))
498. Gods Unchained - New Expansion: Guardians of Elderym, The Full Guide
   · Evidence informing base-year company-share estimates: Published pack prices and maximum supplies imply a USD xx.xx undiscounted primary-offer ceiling for the June-2025 issue. The record permits discounts up to xx.xx%; neither the ceiling nor listed supply establishes actual sales. ([portal.godsunchained.com](https://portal.godsunchained.com/blog/new-expansion-guardians-of-elderym-the-full-guide))
499. Guild of Guardians - Apps on Google Play
   · Evidence informing base-year company-share estimates: The retrieved listing shows 1M+ cumulative Android downloads and in-app purchasing. This later installed-scale observation supports only an explicitly uncertain backcast, not observed calendar-2025 active users or revenue. ([play.google.com](https://play.google.com/store/apps/details?id=com.immutable.guildofguardians))
500. Guild of Guardians - App Store
   · Evidence informing base-year company-share estimates: The listing identifies IMMUTABLE PTY LTD as seller, records 2025 releases and establishes a separate iOS purchasing route. It does not disclose the iOS audience increment assumed by the model. ([apps.apple.com](https://apps.apple.com/us/app/guild-of-guardians/id1574135647))
501. Guild of Guardians - 1 Year Anniversary Event
   · Evidence informing base-year company-share estimates: The May xx.xx 2025 announcement prices the premium anniversary event pass at USD xx.xx. This is a dated primary-purchase price anchor, not evidence of monthly repeat purchasing or payer conversion. ([guildofguardians.com](https://www.guildofguardians.com/news/xx.xx-year-anniversary-event))
502. Gods Unchained - Official Blog Archive
   · Evidence informing base-year company-share estimates: The official archive records multiple 2025 expansion and pass announcements, including Season xx.xx in November. It supports recurring commercial windows, not the model's exact eight paid-cycle equivalents or their purchasing volumes. ([portal.godsunchained.com](https://portal.godsunchained.com/blog?0fa9c1a2_page=xx.xx&dcf9c905_page=xx.xx&utm_source=openai))
503. Immutable Games and Bazooka Tango Join Forces to Revive Shardbound
   · Evidence informing base-year company-share estimates: Immutable's own announcement describes its Shardbound contribution as web3 strategy and implementation with Bazooka Tango. The partnership does not establish that all partner-game buyer expenditure belongs to Immutable. ([prnewswire.com](https://www.prnewswire.com/news-releases/immutable-games-and-bazooka-tango-join-forces-to-revive-shardbound-xx.xx.html))

22.2. Market Concentration Analysis, 2025

Control is concentrated at particular commercial gates rather than uniformly across all Gaming offerings. Apple controls admission and commercial conditions for relevant distribution on its devices, even where EU alternative marketplaces and developer websites are permitted. [illegible]

[illegible] Cloud providers therefore need to identify the applicable title and territory before choosing a counterparty. Another service operator cannot substitute for the required streaming permission merely by offering suitable remote execution.

Branded content creates another control point. Electronic Arts Inc. discloses dependence on sports and Disney licenses, while Hasbro, Inc. combines internal commercialization of Magic: The Gathering Arena with licensing to partners for MONOPOLY GO! [illegible] A developer seeking simultaneous browser distribution should compare these actual agreements rather than assume that all advertising-funded portals impose the same restriction. The alternative trades a broader channel footprint against the platform's stated investment and monetization relationship; the negotiated contract remains decisive.

Ownership changes must be separated from shared investors and historical affiliations. [illegible] The reported MOONTON acquisition agreement does not settle subsequent closing, so MOONTON and Savvy cannot be treated as a verified combined negotiating counterparty on that evidence alone.

[illegible] CD PROJEKT S.A.'s completed GOG disposal separates its game-development business from that storefront. These records support

transaction-specific attribution, not an assumption that every historically associated studio remains under the same control.

Entity identity remains a material qualification issue. The Gameloft-branded legal notice identifies Gameloft S.E.; Devolver Digital's website terms identify Devolver Digital, Inc. ■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■ ■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■ ■■■■■■ ■■ ■■ ■■■■■■■ ■■■ ■■■■■ ■■■■■ ■■■■■■■■■■ ■■■ ■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■ ■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■ ■■■ ■■■■■■■ ■■ ■ ■■■■■■ ■■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■

Creator-platform participation does not eliminate platform bargaining power over payment. ■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■ ■■■■■■■ ■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■ ■■■■■ ■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■ ■■■ ■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■ ■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■■■ The comparison must therefore include payment eligibility and support duties, not merely storefront presence.

Sources & Evidence

1. Microsoft / Activision Blizzard (ex-cloud streaming rights) merger inquiry
   · The CMA record separates covered non-EEA streaming rights into Ubisoft, provides nonexclusive EEA rights, and preserves specified Microsoft licensing arrangements. ([gov.uk](https://www.gov.uk/cma-cases/microsoft-slash-activision-blizzard-ex-cloud-streaming-rights-merger-inquiry))
2. Developer Exchange Terms of Use - Roblox
   · Roblox Developer Exchange retains discretionary determination of qualifying earnings and cash-out approval. ([en.help.roblox.com](https://en.help.roblox.com/hc/en-us/articles/xx.xx-Developer-Exchange-Terms-of-Use))
3. Changes for Apps in the European Union - Apple Developer
   · Apple's EU terms effective October xx.xx 2026 retain notarization, eligibility, and qualifying commercial conditions while allowing alternative distribution. ([developer.apple.com](https://developer.apple.com/support/apps-in-the-eu/))
4. Steam Keys - Steamworks Documentation
   · External key distribution changes checkout without removing the Steam activation gate. ([partner.steamgames.com](https://partner.steamgames.com/doc/features/keys))
5. Electronic Arts Inc. Form 10-K - Fiscal Year Ended March 31, 2026
   · EA's fiscal 2026 filing identifies sports and Disney licensing dependencies and risks from failure to maintain those rights. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ea-xx.xx.htm))
6. EA SPORTS and the NFL Expand Partnership to Power the Future of Interactive Football
   · EA's October xx.xx 2025 announcement establishes expanded NFL licensing and Madden exclusivity within action-simulation NFL games, not every football-game format. ([ea.com](https://www.ea.com/news/ea-sports-nfl-expand-partnership))
7. Download Epic Games for iOS & iPhone - Epic Games Store
   · Epic's iOS offering identifies jurisdiction- and device-specific alternative storefront access. ([store.epicgames.com](https://store.epicgames.com/mobile/ios))

8. Hasbro, Inc. Form 10-K - Fiscal Year Ended December 28, 2025
   · Hasbro distinguishes internally commercialized Arena from partner-developed licensed MONOPOLY GO! and Baldur's Gate xx.xx identifying Scopely and Larian relationships. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/has-xx.xx.htm))
9. How We Partner with You - Poki Documentation
   · Poki distinguishes web-exclusive and nonexclusive agreements and preserves non-web distribution; actual terms are negotiated. ([developers.poki.com](https://developers.poki.com/guide/revenue-deal-types))
10. CrazyGames Developer Terms - August 18, 2025
    · CrazyGames' developer terms identify Maxflow BV and establish a normally nonexclusive distribution grant with an optional exclusive relationship. ([files.crazygames.com](https://files.crazygames.com/documents/developer_terms_20250818.pdf))
11. Ubisoft Announces Completion of Tencent's Strategic Investment in Vantage Studios
    · Ubisoft's November xx.xx 2025 closing announcement states that Tencent's completed Vantage Studios investment leaves exclusive control and consolidation with Ubisoft. ([staticctf.ubisoft.com](https://staticctf.ubisoft.com/8aefmxkxpxwl/75tVaQDaf9A5X8N97roq4K/814c781d6a1eddc77195aafb8a5cf267/Closing_press_release_21.xx.xx.25_FR.pdf))
12. EA Announces Completion of Acquisition by PIF, Silver Lake, and Affinity Partners
    · EA announced completion of its acquisition by the PIF, Silver Lake, and Affinity Partners consortium on August xx.xx 2026. The release does not establish an EA-Savvy merger. ([ea.com](https://www.ea.com/amp/news/ea-announces-completion-of-acquisition))
13. Scopely Completes Acquisition of Niantic's Games Business - Savvy Games Group
    · Savvy identifies Scopely as wholly owned and records completion of Scopely's acquisition of Niantic's games business. ([savvygames.com](https://www.savvygames.com/news/scopely-completes-acquisition-of-niantic-games-business))
14. ByteDance Sells Games Studio Moonton to Saudi Firm amid Pivot to AI
    · The March xx.xx 2026 news account corroborates the MOONTON-Savvy agreement and quotes a Savvy representative expecting completion later; it does not establish subsequent closing. ([scmp.com](https://www.scmp.com/tech/article/xx.xx/bytedance-sells-games-studio-moonton-saudi-firm-over-us6-billion-amid-pivot-ai))
15. Embracer Group Publishes Interim Report Q3, October-December 2025
    · Embracer's interim disclosure establishes Coffee Stain's completed separation on December xx.xx 2025. ([embracer.com](https://www.embracer.com/releases/embracer-group-publishes-interim-report-q3-october-december-2025-adjusted-ebit-amounted-to-sek-xx.xx-million/))
16. Embracer Group Completes the Divestment of Selected Assets from Saber Interactive
    · Embracer announced completion of the selected Saber-asset divestment on March xx.xx 2024. The event concerns the specified transferred assets, not every historically associated business. ([embracer.com](https://www.embracer.com/releases/embracer-group-completes-the-divestment-of-selected-assets-from-the-operative-group-saber-interactive/))
17. Paradox Interactive - Interim Report January-March 2025
    · Paradox's January-March 2025 interim report records its completed acquisition of Haemimont Games, establishing parent-studio overlap. ([attachment.news.eu.nasdaq.com](https://attachment.news.eu.nasdaq.com/a190b8a8a83ea466e6457ad37408e4a6e))
18. AppLovin Completes Sale of Mobile Gaming Business to Tripledot Studios
    · AppLovin's announcement states that its mobile-game business sale to Tripledot closed June xx.xx 2025. ([investors.applovin.com](https://investors.applovin.com/news/news-details/2025/AppLovin-Completes-Sale-of-Mobile-Gaming-Business-to-Tripledot-Studios/default.aspx))
19. The CD PROJEKT Group Wraps Up 2025
    · CD PROJEKT's business review states that disposal of all GOG shares was finalized December xx.xx 2025. ([cdprojekt.com](https://www.cdprojekt.com/en/media/news/the-cd-projekt-groups-wraps-up-2025/))

20. CD PROJEKT - Current Report No. 12/2026
    · The August xx.xx 2026 regulatory notice records the registered name CD PROJEKT RED S.A. and expressly preserves the same legal entity and registration details. ([cdprojekt.com](https://www.cdprojekt.com/en/investors/regulatory-announcements/current-report-no-xx.xx-2026/))
21. Legal Notice - Gameloft Business Solutions
    · The Gameloft-branded business legal notice identifies Gameloft S.E. as the registered company behind its commercial services. ([gameloft.com](https://www.gameloft.com/business-solutions/legal-notice))
22. Terms of Use - Devolver Digital
    · Devolver's website terms identify Devolver Digital, Inc. as the operator, supporting caution about treating the paired captured names as independent companies. ([investors.devolverdigital.com](https://investors.devolverdigital.com/terms-of-use/))

22.3. Recent Developments & Impact Analysis, 2025

[redacted] Games or EA, the relevant consequence is a need to confirm continuing contracting authority and obligations. Neither parent-level event establishes a new title license, transferred player entitlement, or completed integration with another gaming group.

[redacted] Publishers should distinguish negotiations for game rights from negotiations for commerce services and identify the responsible legal entity. A completed acquisition expands the documented business relationship but does not itself establish compatibility with every game, account, or country.

Other completed transactions have produced counterforces to consolidation. [redacted] Historical group associations and minority investment therefore cannot substitute for the current title-rights and control relationship when assembling a partner shortlist.

Mobile distribution alternatives have become more specific, not universally portable. Google's March xx.xx 2026 announcement introduced a shared mobile-and-PC purchase entitlement for selected paid games, while distinguishing other initiatives as forthcoming rollouts. [redacted]

[illegible]

Microsoft's September xx.xx 2026 announcement schedules revised subscription cloud-play allowances and a separate purchasing route for eligible owned-game streaming beginning in November 2026. [illegible] Households and bundle providers should compare the applicable entitlement at activation and renewal rather than promise unrestricted premium use or immediate access through the announced Microsoft route.

[illegible] The competitive effect is a more articulated media-procurement proposition, not demonstrated equivalence with every campaign or assured access to beta inventory. Agencies should obtain the specific placement and reporting commitment before substituting it for established inventory.

Legal developments can constrain an otherwise marketed virtual-item portfolio. [illegible] Distribution partners should verify the selected title's local listing and applicable restrictions before committing.

Sources & Evidence

1. GeForce NOW FAQs
   · The FAQ distinguishes premium-use allowances, fallback access, and qualifying Founders exceptions. ([nvidia.com](https://www.nvidia.com/en-us/geforce-now/faq/))
2. Roblox Expands Advertising Platform as Essential Channel for the Next Generations
   · Roblox's January xx.xx 2026 disclosure differentiates available Rewarded Video from closed-beta Homepage Feature and describes programmatic purchasing relationships. ([about.roblox.com](https://about.roblox.com/newsroom/2026/xx.xx/roblox-expands-advertising-platform))
3. Changes for Apps in the European Union - Apple Developer
   · The effective unified EU terms change the applicable agreement without establishing universal access or independent confirmation of regulatory compliance. ([developer.apple.com](https://developer.apple.com/support/apps-in-the-eu/))
4. Upcoming Changes to Xbox Cloud Gaming
   · Microsoft's September xx.xx 2026 announcement schedules changed subscription cloud-play allowances and a separate purchasing route for eligible owned-game streaming beginning in November 2026. ([news.xbox.com](https://news.xbox.com/en-us/2026/xx.xx/xx.xx/xbox-cloud-gaming-changes/))
5. Download Epic Games for iOS & iPhone - Epic Games Store
   · The page identifies EU iPhone and iPad access and supported iPhone routes in Japan and Brazil, not unrestricted worldwide iOS distribution. ([store.epicgames.com](https://store.epicgames.com/mobile/ios))

6. Immersive Ads on Roblox
   · The portfolio corroborates format differentiation without independently establishing campaign effectiveness or every agency's eligibility. ([brands.roblox.com](https://brands.roblox.com/advertising))
7. Playtika Holding Corp. Form 10-K - Year Ended December 31, 2025
   · The filing reports a Washington attorney general lawsuit initiated February xx.xx 2026 and withdrawal of certain games from a platform after a Washington-related challenge. It does not establish a judgment on every game. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/playtika-xx.xx.htm))
8. Coda Completes Acquisition of Recharge, Expanding Global Reach
   · The August xx.xx 2025 announcement establishes completion, not merely agreement, of the Recharge acquisition.
   ([coda.co](https://www.coda.co/press/coda-completes-recharge-acquisition-expanding-global-reach/))
9. Ubisoft Announces Completion of Tencent's Strategic Investment in Vantage Studios
   · The completed investment provides an example of economic participation without a transfer of exclusive operating control.
   ([staticctf.ubisoft.com](https://staticctf.ubisoft.com/8aefmxkxpxwl/75tVaQDaf9A5X8N97roq4K/814c781d6a1eddc77195aafb8a5cf267/Closing_press_release_21.xx.xx.25_FR.pdf))
10. EA Announces Completion of Acquisition by PIF, Silver Lake, and Affinity Partners
    · The completed acquisition changes corporate oversight but does not itself convey a new title license or player entitlement. ([ea.com](https://www.ea.com/amp/news/ea-announces-completion-of-acquisition))
11. Embracer Group Publishes Interim Report Q3, October-December 2025
    · The completed separation is a change in reporting and operating affiliation rather than a merely proposed event. ([embracer.com](https://www.embracer.com/releases/embracer-group-publishes-interim-report-q3-october-december-2025-adjusted-ebit-amounted-to-sek-xx.xx-million/))
12. Embracer Group Completes the Divestment of Selected Assets from Saber Interactive
    · The completed transaction supports separating transferred Saber assets from an unchanged historical Embracer perimeter.
    ([embracer.com](https://www.embracer.com/releases/embracer-group-completes-the-divestment-of-selected-assets-from-the-operative-group-saber-interactive/))
13. AppLovin Completes Sale of Mobile Gaming Business to Tripledot Studios
    · The completed sale separates transferred publishing assets from AppLovin's continuing business and changes the relevant transaction perimeter.
    ([investors.applovin.com](https://investors.applovin.com/news/news-details/2025/AppLovin-Completes-Sale-of-Mobile-Gaming-Business-to-Tripledot-Studios/default.aspx))
14. The CD PROJEKT Group Wraps Up 2025
    · The completed GOG disposal separates the storefront from CD PROJEKT's continuing game-development focus. ([cdprojekt.com](https://www.cdprojekt.com/en/media/news/the-cd-projekt-groups-wraps-up-2025/))
15. Warner Bros. Discovery, Inc. Form 8-K - Completion of Skydance Acquisition
    · Warner Bros. Discovery's Form xx.xx-K records completion of Skydance's acquisition on October xx.xx 2026 and WBD's survival as a subsidiary, without establishing every Warner Bros. Games contract or game-rights allocation. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/d200872d8k.htm))
16. New Ways to Try, Buy and Master Paid Games with Google Play
    · Google's March xx.xx 2026 announcement describes a shared mobile-and-PC purchase entitlement rolling out for selected paid games and distinguishes other initiatives as forthcoming.
    ([blog.google](https://blog.google/products-and-platforms/platforms/google-play/google-play-paid-games-updates/))

22.4. Product Portfolio Analysis, 2025

Gaming portfolios differ in what the buyer actually receives. ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■ ■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■■■■

[illegible] These are alternative access packages, not equivalent catalogs or transferable ownership relationships.

Single-title commitments remain distinct from libraries. SQUARE ENIX HOLDINGS CO., LTD.'s FINAL FANTASY XIV requires the appropriate product registration and continuing game subscription; its PlayStation offering does not require PlayStation Plus. [illegible]

Publisher breadth should be interpreted through the content and rights offered. [illegible] These companies can address overlapping recreational needs, but a distribution agreement for one title does not convey another franchise's rights, platform coverage, or continuing-service obligations.

Live-game portfolios create a separate comparison between franchise ownership, publishing participation, and local operation. [illegible] For buyers and partners, the relevant distinction is the selected title's operator, territory, and service commitment-not simply whether the group has a recognizable franchise.

Casual and mobile offerings also require narrower peer groups. [illegible]

[illegible] These portfolios compete for some of the same leisure occasions, yet genre overlap does not establish equivalent purchase benefits or legal treatment.

Dedicated devices and supporting equipment belong to different purchasing comparisons. [illegible] A portfolio comparison should isolate the included gaming device or accessory rather than attribute every computer, component, hearing product, or broader service to Gaming.

Immersive content is not interchangeable with the equipment needed to access it. [illegible] Retailers should match the intended game and edition to the buyer's equipment; an immersive-content portfolio does not establish cross-store purchase portability or compatibility with every headset.

Regional publishing alternatives solve different commercialization problems. [illegible] The commercial choice is between appointing a publishing intermediary and licensing or distributing a developer's particular game; a studio's regional origin does not make it a local distributor for another rights holder.

Regional access also involves language, legal counterparties, and continuing support. [illegible]

[redacted] These are different routes to an audience; none establishes blanket rights across every country or title.

[redacted] Such relationships establish specific contributions, not ownership of every associated franchise or an interchangeable continent-wide publishing mandate. A prospective partner should identify whether it needs local payment access, audience service, original content, or commissioned development before assigning responsibilities.

[redacted] Overwolf and mod.io Pty Ltd provide creator or mod-commerce relationships; Xsolla and Coda provide game-commerce services. These capabilities can support included offerings, but their contracts do not automatically grant the supplier the publisher's content rights or the player's game access.

Sources & Evidence

1. GeForce NOW FAQs
   · GeForce NOW supplies remote execution rather than automatic acquisition of the desired paid games. ([nvidia.com](https://www.nvidia.com/en-us/geforce-now/faq/))
2. Introducing Meta Quest 3S, Our Most Affordable Mixed Reality Headset
   · Meta's September 2024 Quest 3S disclosure identifies dedicated XR equipment and compatibility with the then-existing Quest application and game library. ([about.fb.com](https://about.fb.com/news/2024/xx.xx/meta-quest-3s-our-most-affordable-mixed-reality-headset/))
3. Nintendo Annual Report 2026 - Fiscal Year Ended March 31, 2026
   · Nintendo's fiscal-year-ended-March-2026 report identifies dedicated hardware, game software, and Nintendo Switch Online services. ([nintendo.co.jp](https://www.nintendo.co.jp/ir/pdf/2026/annual2603e.pdf))
4. Xbox Game Pass - Plans and Features
   · Game Pass is a continuing access offering with plan-specific benefits, supporting its distinction from equipment or individual game purchases. ([xbox.com](https://www.xbox.com/en-US/xbox-game-pass))
5. FINAL FANTASY XIV Product Page
   · FINAL FANTASY XIV distinguishes product eligibility and continuing game subscriptions and states that PlayStation Plus is unnecessary on PlayStation. ([na.finalfantasyxiv.com](https://na.finalfantasyxiv.com/product/))
6. Apple Arcade
   · Apple Arcade is a game-library subscription without advertising or in-app purchases, with supported-device conditions. ([apple.com](https://www.apple.com/apple-arcade/))
7. Playtika Holding Corp. Form 10-K - Year Ended December 31, 2025
   · Playtika discloses optional virtual-item purchasing and no in-game real-money winnings. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/playtika-xx.xx.htm))

8. Corsair Gaming, Inc. Form 10-K - Year Ended December 31, 2025
   · Corsair's mandatory filing identifies its peripheral business and brands including SCUF and the acquired Fanatec business. ([ir.corsair.com](https://ir.corsair.com/static-files/c0592257-5f03-xx.xx-8a5d-ddd86ff196c4))
9. Play Games on Mobile Devices
   · Netflix supplies membership-included mobile-game access rather than a separate game-only subscription. ([help.netflix.com](https://help.netflix.com/en/node/xx.xx))
10. The New York Times Company Form 10-Q - Quarter Ended June 30, 2026
    · The New York Times Company's quarter-ended-June-2026 filing identifies Games within standalone digital subscriptions and its cross-service bundle. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/nyt-xx.xx.htm))
11. Services - Tamatem Games
    · Tamatem's offered localization and audience services support a regional publishing-role comparison. ([tamatem.co](https://tamatem.co/service/))
12. Publishing - Carry1st
    · Carry1st's publishing portfolio establishes offered audience services distinct from its transaction role. ([carry1st.com](https://carry1st.com/publishing))
13. Game Purchase - Factorio
    · Wube's purchasing route demonstrates coexistence of direct delivery and Steam access for Factorio. ([factorio.com](https://www.factorio.com/buy))
14. Sony Corporate Report 2025
    · Sony's Game & Network Services discussion identifies PlayStation hardware, peripherals, Store, and Plus within an integrated platform business. ([sony.com](https://www.sony.com/en/SonyInfo/IR/library/corporatereport/CorporateReport2025_E.pdf))
15. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    · Reported Blizzard operations establish a territorial operating role without establishing ownership of every underlying franchise. ([ir.netease.com](https://ir.netease.com/node/xx.xx))
16. Blacknut - The Cloud Gaming Experience
    · The offered subscription supplies library access across supported connected devices. ([blacknut.com](https://www.blacknut.com/en/support/blacknut-cloud-gaming))
17. What Is Amazon Luna?
    · The article updated September xx.xx 2026 establishes a layered membership-and-cloud offering, not universal access to every game. ([aboutamazon.com](https://www.aboutamazon.com/news/entertainment/what-is-amazon-luna))
18. Tencent Holdings Limited Interim Report 2026
    · Tencent's interim report separates domestic and international game operations and identifies continuing franchise activity. ([tencent.com](https://www.tencent.com/wp-content/uploads/2026/xx.xx/E700_IR.pdf))
19. Corporate Profile - Take-Two Interactive Software, Inc.
    · Take-Two's corporate profile identifies Rockstar Games, 2K, and Zynga as operating labels within its interactive-entertainment business. ([take2games.com](https://www.take2games.com/en/ir))
20. Digital Unit - Bandai Namco Holdings Integrated Report 2025
    · Bandai Namco's Digital Unit discussion identifies network content, home-console games, ELDEN RING SHADOW OF THE ERDTREE, and DRAGON BALL Sparking! ZERO. ([bandainamco.co.jp](https://www.bandainamco.co.jp/en/ir/library/digital_unit2025.html))
21. SEGA SAMMY Integrated Report 2025 - Growth Strategy
    · SEGA SAMMY's report identifies Sonic-related game activities and Rovio within its entertainment-content discussion, separating released business from planned projects. ([segasammy.co.jp](https://www.segasammy.co.jp/cms/wp-content/uploads/pdf/en/ir/ir_2025_web_03_en.pdf))
22. Business Segments - CAPCOM
    · Capcom's business description dated May xx.xx 2026 identifies console and PC game content and separate mobile management and IP-licensing activities. ([capcom.co.jp](https://www.capcom.co.jp/ir/english/company/business_seg.html))

23. Digital Entertainment Business - KONAMI GROUP CORPORATION
    · Konami's Digital Entertainment portfolio identifies console and mobile activities, including eFootball and digital Yu-Gi-Oh! offerings. ([konami.com](https://www.konami.com/corporate/en/business/digitalentertainment.html))
24. NEXON Co., Ltd. - Notice of the 24th Annual General Meeting of Shareholders
    · Nexon's shareholder notice and business report identify continuing MapleStory and Dungeon&Fighter franchise operations within its reported business. ([nexon.co.jp](https://www.nexon.co.jp/en/ir/uploads/ad3f8641565c3a3c2f7012d6b3e2de6a26ee2f73.pdf))
25. PUBG: BATTLEGROUNDS - Privacy Policy
    · PUBG: BATTLEGROUNDS' privacy policy identifies KRAFTON, Inc. as the provider of its game and services. ([pubg.com](https://pubg.com/en/clause/privacy_policy))
26. Netmarble - 4Q 2025 & FY 2025 Earnings Results
    · Netmarble's February xx.xx 2026 presentation identifies operated games including Seven Knights Re:BIRTH and Solo Leveling: ARISE and distinguishes existing offerings from planned releases. ([sgimage.netmarble.com](https://sgimage.netmarble.com/images/netmarble/nmOfficial/xx.xx/8sto1770273390151.pdf))
27. NC Announces Financial Results for Second Quarter 2026
    · NC's second-quarter 2026 release identifies continuing Lineage PC and mobile game operations. ([about.ncsoft.com](https://about.ncsoft.com/en/news/article/nc_update_260818))
28. Games - Pearl Abyss
    · Pearl Abyss presents Black Desert on PC and consoles, Black Desert Mobile separately, and labels DokeV and PLAN xx.xx as in development. ([pearlabyss.com](https://www.pearlabyss.com/en-US/Company/About/Games))
29. Sea First Quarter 2026 Results Deck
    · Sea's first-quarter 2026 presentation identifies Garena as digital entertainment and discusses Free Fire operations. ([cdn.sea.com](https://cdn.sea.com/investor/1Q2026/HEEdeRDe0NyiZ1PrWIvH/xx.xx.xx.xx%20Sea%20First%20Quarter%xx.xx%20Results%20Deck.pdf))
30. About Us - MOONTON Games
    · MOONTON's company description identifies its development and publishing role and Mobile Legends: Bang Bang offering. ([en.moonton.com](https://en.moonton.com/about/index.html))
31. Terms of Service - Dream Games
    · Dream Games' terms identify commercial game services and virtual-item purchasing, with Royal Match and Royal Kingdom in its product navigation. ([dreamgames.com](https://www.dreamgames.com/en/terms))
32. Games - Voodoo
    · Voodoo's official games catalog presents named puzzle, casual, action, and strategy offerings without establishing identical commercial terms across titles. ([voodoo.io](https://voodoo.io/games))
33. King of Avalon - FunPlus
    · FunPlus presents King of Avalon as a named strategy-game offering. ([funplus.com](https://funplus.com/games/king-of-avalon/))
34. Product Madness - Aristocrat Leisure Limited
    · Aristocrat identifies Product Madness as its free-to-play social-casino mobile-game business, distinct from its other business categories. ([aristocrat.com](https://www.aristocrat.com/product-madness/))
35. Games - PLAYSTUDIOS
    · PLAYSTUDIOS' portfolio presents Tetris-branded games and casino-themed titles; the catalog does not establish every title's licensing or monetization terms. ([playstudios.com](https://www.playstudios.com/games/))
36. Terms of Service - G5 Games
    · G5's terms identify G5 Entertainment and associated businesses licensing games through its website and third-party channels. ([g5.com](https://www.g5.com/termsofservice))

37. HTC VIVE Headsets and Accessories
    - HTC's VIVE product catalog presents standalone and PC VR headsets and accessories. ([vive.com](https://www.vive.com/us/product/))
38. Gaming on the Go: Lenovo Unveils a New Legion Gaming Handheld Device and Accessories
    - Lenovo's September xx.xx 2023 announcement identifies Legion Go as a gaming handheld and describes related accessories; it does not establish present seller-specific availability. ([news.lenovo.com](https://news.lenovo.com/pressroom/press-releases/legion-go-gaming-handheld-device-and-accessories/))
39. About Razer - Company History and Identity
    - Razer's company description identifies gaming peripherals alongside software and services. ([razer.com](https://www.razer.com/about-razer))
40. HyperX PC Gaming - HP
    - HP's official portfolio presents HyperX gaming accessories alongside general-purpose gaming computers. ([hp.com](https://www.hp.com/us-en/gaming-pc.html))
41. GN Group - Business Description
    - GN Group identifies SteelSeries within its gaming business, separately from hearing and other group activities. ([gn.com](https://www.gn.com/About/GN-Group))
42. Games - Resolution Games
    - Resolution Games' catalog identifies Demeo, Demeo Battles, and Racket Club and presents platform-specific game categories. ([resolutiongames.com](https://www.resolutiongames.com/games))
43. Games - ARVORE
    - ARVORE's game portfolio identifies Pixel Ripped titles and YUKI as immersive-game offerings. ([arvore.io](https://www.arvore.io/games))
44. About - Fast Travel Games
    - Fast Travel Games describes VR development and third-party publishing activities in its company presentation. ([fasttravelgames.com](https://www.fasttravelgames.com/about))
45. Publishing - HyperBeard
    - HyperBeard offers publishing, localization, marketing, and player-support services and identifies Cometa Games with My Dear Farm and Cozy Forest. ([hyperbeard.com](https://hyperbeard.com/publishing/))
46. Brazil Games - Gamescom 2024 Company Catalog
    - QUByte's company-authored entry in the 2024 catalog describes porting and publishing services across game platforms. This establishes its stated service role, not a universal current contract. ([abragames.org](https://www.abragames.org/uploads/xx.xx/xx.xx/xx.xx/xx.xx/xx.xx/brazilgames_catalogo_gamescom_digital_20_06_24_r.pdf))
47. About Navegante - Company Presentation Hosted by JETRO
    - Navegante's presentation identifies Greak: Memories of Azur as a released PC and console game with a Team17 publishing relationship. ([jetro.go.jp](https://www.jetro.go.jp/newsletter/dnf/2025/game_buyer/navegante.pdf))
48. Sector Videojuegos en Uruguay - Febrero 2026
    - Uruguay XXI's February 2026 business cases connect Ironhide with Kingdom Rush, Pomelo with Outlanders, and Batovi with soccer games and Apple-platform distribution. ([uruguayxxi.gub.uy](https://www.uruguayxxi.gub.uy/uploads/informacion/c0ea20c01f23cc2b8cdcdcbe7de41b562227b96d.pdf))
49. Online Games - Asphere Innovations Public Company Limited
    - Asphere identifies PlayPark's game-service entities across Southeast Asian countries, supporting legal-counterparty-specific regional comparison. ([asphere.co](https://asphere.co/en/online-games/))
50. Subsidiaries - SOFT-WORLD
    - Soft-World's subsidiary description identifies localization, marketing, and community-management services. Historical game agency examples do not establish every current license. ([soft-world.com](https://www.soft-world.com/en/subsidiaries.html))

51. About Gamania
    · Gamania's business description records regional publishing relationships and game launches; it does not establish present title-level license terms. ([gamania.com](https://www.gamania.com/en/about))
52. About Us - Game Power 7
    · Game Power xx.xx describes Arabic game publishing and localization, including its Arabic Rappelz relationship. ([gamepower7.com](https://gamepower7.com/en/about-us))
53. Strategic Partnership Between Manga Productions and SEGA to Publish Sonic Racing: CrossWorlds in MENA
    · Manga Productions' July xx.xx 2025 announcement establishes a SEGA agreement for Sonic Racing: CrossWorlds publishing and distribution in MENA, not every country-level permission or sale. ([manga.com.sa](https://manga.com.sa/news/strategic-partnership-between-manga-productions-and-sega-to-publish-sonic-racing-crossworlds-in-mena/))
54. Yalla Group Limited Form 20-F - Fiscal Year 2025
    · Yalla's fiscal 2025 filing identifies Yalla Ludo and distinguishes its gaming activities from chatting services. ([filecache.investorroom.com](https://filecache.investorroom.com/mr5ir_yalla/xx.xx/download/YALA-2025-20F.pdf))
55. Maliyo Games Wins Big at the FNB App of the Year Awards 2024
    · Maliyo's own 2024 announcement identifies its Disney collaboration on Iwájú: Rising Chef, supporting a specific licensed-content contribution rather than franchise ownership. ([maliyo.com](https://www.maliyo.com/maliyo-games-wins-big-at-the-fnb-app-of-the-year-awards-2024/))
56. Press - Clockwork Acorn
    · Clockwork Acorn's press kit identifies original releases, development services, and its Terra Nil collaboration with Free Lives. ([clockworkacorn.com](https://clockworkacorn.com/press/))
57. Unity Plans and Products
    · Unity's product portfolio establishes developer-software offerings rather than automatic rights to consumer games built with them. ([unity.com](https://unity.com/products))
58. About Us - Keywords Studios Limited
    · Keywords describes external services supplied to game businesses, supporting separation of service capability from consumer-game ownership. ([keywordsstudios.com](https://www.keywordsstudios.com/en/about-us/))
59. About Us - Room 8 Group
    · Room xx.xx Group describes commercial co-development services and contributed game projects. ([room8group.com](https://room8group.com/about-us/))
60. About Us - Virtuos
    · Virtuos describes external game-development services; this capability does not establish ownership of customers' content. ([virtuosgames.com](https://www.virtuosgames.com/about-us/))
61. Contact Photon - Support and Offices
    · Photon's official contact page identifies Exit Games GmbH and named multiplayer products. ([photonengine.com](https://www.photonengine.com/contact))
62. About Heroic Labs, Nakama, Hiro and Satori
    · Heroic Labs identifies Nakama, Hiro, Satori, and Heroic Cloud within its game-infrastructure business. ([heroiclabs.com](https://heroiclabs.com/about/))
63. AccelByte Customer Stories
    · AccelByte's customer material connects its services with projects involving Skybound Games, Dreamhaven, Theorycraft Games, and AEXLAB; these references do not establish ownership of the projects. ([accelbyte.io](https://accelbyte.io/customer-stories))
64. Ubitus Cloud Gaming Platform Turnkey Solution
    · Ubitus offers cloud-gaming enablement to game developers, publishers, telecom operators, and platform providers. ([ubitus.ai](https://ubitus.ai/cloud-gaming/))
65. Our Story - Overwolf
    · Overwolf describes game-app, mod, creator, and game-server commerce relationships and identifies associated services. ([overwolf.com](https://www.overwolf.com/our-story/))

66. Terms of Use - mod.io
    · mod.io's terms identify mod.io Pty Ltd and distinguish relationships involving games, creators, purchasers, and resellers. ([mod.io](https://mod.io/legal/terms?no_links=true))
67. Xsolla Web Shop Becomes a Complete D2C Ecosystem for Mobile Games
    · Xsolla's August xx.xx 2026 announcement describes Web Shop Ecosystem with storefront, payment, and merchant-of-record services. ([xsolla.com](https://xsolla.com/newsroom/xsolla-web-shop-becomes-a-complete-d2-c-ecosystem-for-mobile-games))
68. Coda Completes Acquisition of Recharge, Expanding Global Reach
    · Coda identifies game-commerce products and reports completed acquisition of Recharge on August xx.xx 2025. ([coda.co](https://www.coda.co/press/coda-completes-recharge-acquisition-expanding-global-reach/))

22.5. Benchmarking Analysis, 2025

The defensible access benchmark is the complete usable entitlement for a specified game, account, device, and territory. ■■■■■ ■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■ ■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■ ■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■ A broad catalog is unsuitable as a substitute when the buyer's required title or existing account is not supported.

Equipment should be benchmarked as a usable package rather than a brand-level capability. Nintendo's UK guidance requires original Joy-Con controllers and a compatible charging arrangement for Ring Fit Adventure on Nintendo Switch xx.xx. ■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■ ■■■■■ ■■■■ ■■■ ■■■■ ■■■■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■ ■■■ ■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■ ■■■■■ ■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■■■■

Service obligations also distinguish equipment alternatives. ■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■ ■ ■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■ A published guarantee establishes a commitment within its scope, not independently demonstrated service quality or equivalent coverage from another supplier.

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broader outsourcing is appropriate only when the contract covers the additional audience and support responsibilities.

Learning & Education requires a different purchasing benchmark from household recreation. Minecraft Education distinguishes academic and commercial eligibility while providing the same game features. ■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■ ■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■■

Commercial readiness cannot be inferred uniformly from directories, project pages, or legacy terms. The Puerto Rico Film Commission directory identifies SRG Studios, LED Development Studios LLC., and Render Room, but does not establish a named purchasable game or current delivery obligation. ■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■ ■■■ ■■■■■■■ ■■ ■■■ ■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■■ ■ ■■■■■ ■■■■■ ■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■ ■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■ ■ ■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■■■■■ ■■ ■■■■■■■■■■■■

These benchmarks support offering-specific decisions but do not establish equivalent capabilities for every private or regional participant. Current title rights, local availability, and operating continuity remain material conditions for a broader shortlist. ■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■

Sources & Evidence

1. GeForce NOW FAQs
   · Content entitlement, supported title, local operator, and membership are separate usable-access prerequisites. ([nvidia.com](https://www.nvidia.com/en-us/geforce-now/faq/))
2. Ring Fit Adventure Q&A - Nintendo UK
   · Nintendo's UK guidance requires original Joy-Con controllers and an appropriate charging arrangement for Ring Fit Adventure on Nintendo Switch xx.xx because Joy-Con xx.xx does not fit the accessories. ([nintendo.com](https://www.nintendo.com/en-gb/Support/Purchases-Subscriptions/Games/Ring-Fit-Adventure-Q-A-xx.xx.html))
3. Purchasing Options for Minecraft Education Licenses
   · Minecraft Education distinguishes academic and commercial eligibility, administrator purchasing, and existing licenses while providing the same game features. ([edusupport.minecraft.net](https://edusupport.minecraft.net/hc/en-us/articles/xx.xx-Purchasing-Options-for-Minecraft-Education-Licenses))
4. FINAL FANTASY XIV Product Page
   · Its title-specific prerequisites support comparing a complete single-game entitlement with library and streaming-service memberships. ([na.finalfantasyxiv.com](https://na.finalfantasyxiv.com/product/))
5. Understanding Compatibility: The Fanatec Ecosystem
   · Fanatec's commercial compatibility guidance locates PlayStation licensing in the wheel base and Xbox licensing in the steering wheel; compatible combinations must be checked. ([fanatec.com](https://www.fanatec.com/us/en/explorer/products/racing-wheels-wheel-bases/the-fanatec-ecosystem/))

6. Fanatec Consumer Guarantee
   · Fanatec's guarantee names Corsair GmbH, limits qualifying channels, and applies bundle remedies to the affected individual product rather than automatic full-bundle replacement. ([help.fanatec.com](https://help.fanatec.com/hc/en-us/articles/xx.xx-Fanatec-Consumer-Guarantee))
7. Nuuvem: Seu Jogo no Mercado Latinoamericano
   · Nuuvem's offered commerce and support responsibilities support a narrower service-mandate comparison with publishing and localization. ([nuuvem.com](https://www.nuuvem.com/lp/pt/partners/))
8. Services - Tamatem Games
   · The service portfolio supports distinguishing a cultural-localization and community mandate from payment administration. ([tamatem.co](https://tamatem.co/service/))
9. Publishing - Carry1st
   · The offered publishing services support benchmarking the breadth of a negotiated mandate rather than assuming payment access includes every service. ([carry1st.com](https://carry1st.com/publishing))
10. Issues with COD Points Purchases for Call of Duty: Mobile - Activision Support
    · The independent game-support record supports transaction-provider qualification and provides alternative purchasing routes. ([support.activision.com](https://support.activision.com/cod-mobile/articles/cod-points-purchases-call-of-duty-mobile))
11. Blacknut - The Cloud Gaming Experience
    · Blacknut's included-library relationship supports an entitlement-based cloud-service benchmark. ([blacknut.com](https://www.blacknut.com/en/support/blacknut-cloud-gaming))
12. Xsolla Web Shop Becomes a Complete D2C Ecosystem for Mobile Games
    · The stated merchant-of-record offering supports comparison of commerce administration with broader publishing mandates, without establishing title rights. ([xsolla.com](https://xsolla.com/newsroom/xsolla-web-shop-becomes-a-complete-d2-c-ecosystem-for-mobile-games))
13. Coda Completes Acquisition of Recharge, Expanding Global Reach
    · Coda's disclosed commerce products support a transaction-service comparison rather than an inference of publishing rights. ([coda.co](https://www.coda.co/press/coda-completes-recharge-acquisition-expanding-global-reach/))
14. PRO Racing Wheel for PlayStation, Xbox and PC - Logitech G
    · Logitech G presents PRO Racing Wheel alternatives with platform-specific compatibility and supported-game information. ([logitechg.com](https://www.logitechg.com/en-us/shop/p/pro-racing-wheel))
15. Summary of the Guillemot Corporation Group's Position during Fiscal 2025
    · Guillemot's fiscal 2025 group-business summary identifies Thrustmaster racing and flight-simulation accessory activities, separate from Hercules music products. ([guillemot.com](https://www.guillemot.com/wp-content/uploads/2026/xx.xx/xx.xx-ExposeSommaire_exercice-2025_EN.pdf))
16. Puerto Rico Film Commission - Film Industry Contacts, April 2025
    · The April 2025 official directory identifies SRG Studios, LED Development Studios LLC., and Render Room as video-game studios but does not establish a named purchasable game or delivery contract. ([discoverpuertorico.com](https://www.discoverpuertorico.com/sites/default/files/2025-xx.xx/PRFC_Film%20Industry%20Contacts_04-2025.pdf))
17. Terms of Service - Sandsoft
    · Sandsoft's terms identify Sandsoft International Tech Ltd as a contracting business; the undated terms do not settle continuing trading status. ([sandsoft.com](https://sandsoft.com/terms-of-service/))
18. Saudi Outfit Sandsoft Is Closing, Say Sources, after Its Owners Pulled the Plug
    · The October xx.xx 2025 news account reports a Sandsoft closure based on sources and states that the company had not confirmed it; legal dissolution and current trading remain unsettled by that account. ([mobilegamer.biz](https://mobilegamer.biz/saudi-outfit-sandsoft-is-closing-say-sources-after-its-owners-pulled-the-plug/))

23. Company Profiles

23.1. Microsoft Corporation

Microsoft combines Xbox consoles, first-party game content, Game Pass library access, and cloud gaming, but these capabilities do not create one interchangeable entitlement. ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ A supported cloud route can provide an alternative to local console execution, but neither purchasing a game nor subscribing establishes access through every device.

▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ It is an announced alternative, not a basis for promising immediate access. Product pages also describe cloud limits without consistently identifying their effective date, making confirmation of applicable regional terms important for continuing household or channel commitments.

Minecraft Education addresses a different purchasing authority. Academic and commercial licenses provide the same game features but differ in eligibility and purchase administration. ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪

Sources & Evidence

1. Purchasing Options for Minecraft Education Licenses

   · Minecraft Education academic and commercial licenses provide the same features but differ in eligibility and administration. Eligible institutions can buy through administrators or partners and should check existing licenses; commercial licensing serves other organizations. ([edusupport.minecraft.net](https://edusupport.minecraft.net/hc/en-us/articles/xx.xx-Purchasing-Options-for-Minecraft-Education-Licenses))

2. Xbox Game Pass - Plans and Features

   · Game Pass access continues only while membership and title inclusion persist; features vary by plan, platform, and region. The page describes cloud-play limits without specifying their effective date in the plan descriptions. ([xbox.com](https://www.xbox.com/en-US/xbox-game-pass))

3. Microsoft 2025 Annual Report

   · Microsoft's fiscal 2025 report identifies Xbox consoles, first-party game content, Game Pass, and gaming activity across PC, console, mobile, and cloud. It supports the integrated offering profile, not interchangeable customer entitlements. ([microsoft.com](https://www.microsoft.com/investor/reports/ar25/index.html))

   · Company verification: Microsoft's FY2025 report identifies gaming operations across PC, console, mobile, and cloud, including Xbox Game Pass and first-party content.

   · Company verification: The report discusses Xbox hardware and the Activision Blizzard acquisition within Microsoft's gaming business.

4. Xbox Cloud Gaming
   · Xbox Cloud Gaming requires supported games, devices, regions, and applicable entitlements. Select free-to-play games require a free Microsoft account; streaming purchased games is limited to supported cloud-playable titles. ([xbox.com](https://www.xbox.com/en-US/cloud-gaming))
5. Upcoming Changes to Xbox Cloud Gaming
   · The September xx.xx 2026 announcement schedules subscription cloud-play allowances and a separate cloud-play purchasing route for November 2026. The proposed nonmember route concerns eligible owned games and supported devices, with market-specific conditions. ([news.xbox.com](https://news.xbox.com/en-us/2026/xx.xx/xx.xx/xbox-cloud-gaming-changes/))
6. European Commission: Acquisition of Activision Blizzard by Microsoft, Subject to Conditions
   · Company verification: The European Commission's May xx.xx 2023 merger decision discusses Microsoft's console, game-distribution, and cloud-gaming activities.
7. UK Competition and Markets Authority - Apple Mobile Platform Final Decision Report, 2025
   · Company verification: The 2025 UK competition decision identifies Xbox Cloud Gaming as a cloud-gaming channel.

23.2. Nintendo Co., Ltd.

Nintendo supplies an integrated hardware, software, and service ecosystem. ■■■ ■■■■■■ ■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■ For retailers, the relevant capability is not simply supplying a newer console: the customer's intended game can require a distinct accessory relationship that survives the hardware transition.

Ring Fit Adventure is a concrete complete-package case. ■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■ ■ ■■■■■■■■ ■■■■ ■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■ ■■■ ■■■ ■■■ ■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■■■ ■■ ■■■ ■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■ ■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■ ■ ■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■ ■■■■■■■ ■■■■■■■■■ Nintendo's compatibility guidance supplies a verification route, not proof of accessory stock or equivalent requirements for every fitness game.

Sources & Evidence

1. Ring Fit Adventure Q&A - Nintendo UK
   · Nintendo's UK Ring Fit Adventure guidance identifies a physical game-card package with Ring-Con and leg strap. Nintendo Switch xx.xx use requires original Joy-Con controllers and a compatible charging arrangement because Joy-Con xx.xx does not fit the accessories. ([nintendo.com](https://www.nintendo.com/en-gb/Support/Purchases-Subscriptions/Games/Ring-Fit-Adventure-Q-A-xx.xx.html))

2. Nintendo Annual Report 2026 - Fiscal Year Ended March 31, 2026
   - Nintendo's fiscal 2026 annual report records the June 2025 Nintendo Switch xx.xx launch, released games including Mario Kart World, and Nintendo Switch Online services for Nintendo Switch and Nintendo Switch xx.xx. ([nintendo.co.jp](https://www.nintendo.co.jp/ir/pdf/2026/annual2603e.pdf))
   - Company verification: Nintendo's FY2026 annual report identifies its dedicated video-game hardware and software business.
   - Company verification: The report records Nintendo Switch xx.xx named game releases, and Nintendo Switch Online as commercial offerings.
3. Compatibility with Nintendo Switch Games - Nintendo UK
   - Nintendo's compatibility page separately confirms that Ring Fit Adventure requires original Nintendo Switch Joy-Con on Nintendo Switch xx.xx and identifies charging dependencies. This supports complete-package verification rather than accessory equivalence. ([nintendo.com](https://www.nintendo.com/en-gb/Hardware/Nintendo-Switch-xx.xx/Compatibility-with-Nintendo-Switch-games-xx.xx.html))

23.3. NetEase, Inc.

NetEase combines its own game portfolio with territorial publishing and operating relationships for overseas intellectual property. The renewed Blizzard publishing agreement announced a mainland China return beginning in summer 2024 and covered World of Warcraft, Hearthstone, and other named Blizzard universes. ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■■ ■■■■■ ■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■ ■■■■■■■■ ■■■■■■■

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Sources & Evidence

1. NPPA - Approval of Internet Game Works Authorized by Overseas Copyright Holders
   - NPPA's imported internet-game requirements distinguish a qualified publishing entity, copyright-contract registration, and an ICP-licensed operator. These requirements support verifying the specific publishing and operating arrangement rather than inferring blanket authorization from NetEase participation. ([nppa.gov.cn](https://www.nppa.gov.cn/bsfw/xksx/cbfxl/wlcbfwspsx/xx.xx/t20221013_600723.html))

2. Blizzard Entertainment and NetEase Renew Agreement to Bring Beloved Titles Back to China; Microsoft Gaming, NetEase Enter Broader Collaboration

   · The joint company release identifies a renewed mainland China publishing agreement covering World of Warcraft, Hearthstone, and other Blizzard universes, with a planned return beginning summer 2024. It establishes a publishing relationship, not franchise ownership or every title's authorization. ([businesswire.com](https://www.businesswire.com/news/home/xx.xx/en/Blizzard-Entertainment-and-NetEase-Renew-Agreement-to-Bring-Beloved-Titles-Back-to-China-Microsoft-Gaming-NetEase-Enter-Broader-Collaboration))

3. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results

   · NetEase's February xx.xx 2026 release reports Blizzard-title operations in China during 2025 and identifies Fantasy Westward Journey and Where Winds Meet within its game portfolio. These are reported operating activities, not independent evidence of superior outcomes. ([ir.netease.com](https://ir.netease.com/news-releases/news-release-details/netease-announces-fourth-quarter-and-fiscal-year-2025-unaudited))

4. NetEase Announces Non-Renewal of Licenses with Blizzard

   · NetEase's November xx.xx 2022 notice anticipated nonrenewal and January xx.xx 2023 expiration of licenses for several Blizzard titles. It supports contractual continuity risk; it is not evidence of permanent withdrawal after the subsequent renewed relationship. ([neteasegames.com](https://www.neteasegames.com/news/xx.xx/37000_1052981.html))

5. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results

   · Company verification: NetEase reports games and related value-added services as a business activity in its fiscal 2025 results.

   · Company verification: The release discusses operation of Blizzard titles in China and NetEase's broader game portfolio.

23.4. Electronic Arts Inc.

Electronic Arts supplies licensed sports and Star Wars games alongside original franchises such as The Sims and Battlefield. ■■■ ■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■ ■■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ The relevant strength is access to documented branded content, accompanied by obligations that ownership of EA's own game brands does not eliminate.

The October xx.xx 2025 expanded NFL agreement provides a specific counterweight to generalized renewal concerns: Madden NFL continues as the exclusive action-simulation game for NFL football under a multiyear arrangement. That category-specific right should not be generalized to every NFL gaming format or other EA franchise. ■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■ ■ ■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■ ■■■ ■■■■■■■■ ■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■

Sources & Evidence

1. Electronic Arts Inc. Form 10-K - Fiscal Year Ended March 31, 2026

   · EA's fiscal 2026 filing identifies sports-league, team, player-association, and Disney licenses and describes risks from failing to maintain rights. It also identifies original franchises including The Sims and Battlefield, supporting comparison of licensed and original-IP relationships. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ea-xx.xx.htm))

2. EA SPORTS and the NFL Expand Partnership to Power the Future of Interactive Football
   - EA's October xx.xx 2025 announcement describes an expanded multiyear NFL agreement and Madden NFL's continuing exclusivity within action-simulation NFL games. It does not establish equivalent exclusivity for all NFL gaming formats or other franchises. ([ea.com](https://www.ea.com/news/ea-sports-nfl-expand-partnership?utm_source=openai))
3. EA Announces Completion of Acquisition by PIF, Silver Lake, and Affinity Partners
   - Company verification: Electronic Arts Inc. announced that its acquisition by the PIF, Silver Lake, and Affinity Partners consortium closed on August xx.xx 2026.
   - Company verification: The announcement identifies EA as a continuing interactive-entertainment operating company; common financial investors do not establish consolidation with Savvy Games Group.
   - Company verification: Electronic Arts announced completion of its acquisition by PIF, Silver Lake, and Affinity Partners on August xx.xx 2026.
   - Company verification: The announcement identifies EA as an operating interactive-entertainment company with game franchises and intellectual property.
4. UK Competition and Markets Authority - Apple Mobile Platform Final Decision Report, 2025
   - Company verification: The decision identifies EA as a developer distributing games through cloud-gaming services.

23.5. Ubisoft Entertainment SA

Ubisoft has a commercial role beyond publishing its own franchises: it acquired separately held cloud-streaming rights for Activision Blizzard content. ■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■ The release window therefore determines which future games enter the arrangement; it should not be mistaken for the expiration of rights already acquired.

For cloud-service providers, Ubisoft is a relevant licensing counterparty even though Microsoft acquired Activision Blizzard. ■■■ ■■■ ■■■■■■ ■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■ ■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■ ■■■■■■■■ In the EEA, applicable commitment-based arrangements offer a separate comparison route rather than making Ubisoft the exclusive option.

Rights acquisition does not establish that every covered game is available through Ubisoft+ or any particular cloud service. Ubisoft's closing announcement separated completion from the subsequent work of bringing games to its subscription offering. ■ ■■■■■■■■ ■■■■■■■ ■■■■ ■ ■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■

Sources & Evidence

1. Microsoft / Activision Blizzard (ex-cloud streaming rights) merger inquiry
   · The CMA record distinguishes Ubisoft's non-EEA rights and nonexclusive EEA license, permits commercialization to other cloud providers, and preserves Microsoft licenses for European Commission commitments and certain existing cloud agreements. ([gov.uk](https://www.gov.uk/cma-cases/microsoft-slash-activision-blizzard-ex-cloud-streaming-rights-merger-inquiry))
2. Ubisoft Finalizes Cloud Streaming Rights Transaction with Activision Blizzard
   · Ubisoft announced completion of its streaming-rights transaction on October xx.xx 2023. The rights cover existing Activision Blizzard games and releases during the following xx.xx years, exist in perpetuity, and distinguish exclusive non-EEA rights from nonexclusive EEA rights. ([staticctf.ubisoft.com](https://staticctf.ubisoft.com/8aefmxkxpxwl/2BQerZVC87jjkgdSnMHq1w/0b626e4f3e5e0940841955cf8c3449d9/Ubisoft_Streaming_Announce_Press_Release_EN_Clean2.pdf))
3. Activision Blizzard Games on Ubisoft+: What You Need to Know
   · Ubisoft's October xx.xx 2023 explanation distinguishes acquired streaming rights from subsequent service availability and confirms the future-release window versus perpetual rights distinction. Its discussion of bringing games to Ubisoft+ is not a current title-by-title catalog commitment. ([news.ubisoft.com](https://news.ubisoft.com/en-gb/article/wy4gKUmOdRRoO5Uvlr8CA/activision-blizzard-games-on-ubisoft-what-you-need-to-know))
4. Ubisoft Reports Full-Year 2025-26 Earnings Figures
   · Company verification: Ubisoft's fiscal 2025-xx.xx results establish an ongoing game-publishing business and discuss its franchise portfolio and operating structure.
   · Company verification: The release identifies Assassin's Creed-related commercial activity and a future release lineup, which must be distinguished from already released offerings.
   · Company verification: Ubisoft's May xx.xx 2026 full-year release establishes continuing game commercialization and discusses its Creative Houses operating-model transition.
   · Company verification: The release identifies released franchise offerings separately from discontinued projects, delayed projects, and future releases.
5. UK Competition and Markets Authority - Apple Mobile Platform Final Decision Report, 2025
   · Company verification: The decision identifies Ubisoft as a developer distributing games through cloud-gaming services.
6. Ubisoft annonce la finalisation de l'investissement stratégique de Tencent dans Vantage Studios
   · Company verification: Ubisoft's November xx.xx 2025 announcement confirms completion of Tencent's investment in Ubisoft Nova SAS, trading as Vantage Studios.
   · Company verification: The announcement states that Vantage Studios remains exclusively controlled and consolidated by Ubisoft and connects it to Assassin's Creed, Far Cry, and Tom Clancy's Rainbow Six.

23.6. SQUARE ENIX HOLDINGS CO., LTD.

The Square Enix Group develops, distributes, and operates games, including the FINAL FANTASY franchise. ■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■ ■■ ■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■ ■■■■■■■■ Buyers should compare the complete entitlement for the intended edition rather than equate this subscription with access to a broad game library.

Platform choice also changes the purchasing relationship. ■■■ ■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■ ■■ ■■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■ ■■■ ■■ ■■■■■■■■■■■■■

[redacted] The restricted Free Trial offers another entry route, but it is not equivalent to unrestricted retail access; changing editions or storefronts should not be assumed to preserve every entitlement.

Sources & Evidence

1. FINAL FANTASY XIV Product Page
   · FINAL FANTASY XIV distinguishes base-product, expansion, subscription, and restricted trial access. Dawntrail requires the base product. PlayStation Plus is unnecessary on PlayStation; the Xbox version requires Game Pass Essential, Premium, or Ultimate. ([na.finalfantasyxiv.com](https://na.finalfantasyxiv.com/product/))
2. Digital Entertainment - SQUARE ENIX HOLDINGS CO., LTD.
   · Square Enix Holdings describes its group's development, distribution, and operation of games and identifies FINAL FANTASY among its principal franchises. The profile attributes these operating capabilities to the group, not exclusively to the holding company. ([hd.square-enix.com](https://www.hd.square-enix.com/eng/group/digitalentertainment.html))
   · Company verification: Square Enix describes planning, development, distribution, and operation of digital entertainment, primarily games, through international operations.
   · Company verification: Named offerings include FINAL FANTASY, DRAGON QUEST, KINGDOM HEARTS, and NieR.
3. SQUARE ENIX Support Center - No Valid Service Account Is Available to Play FINAL FANTASY XIV
   · Square Enix support requires an appropriately registered product and active retail subscription. It distinguishes Steam from non-Steam Windows licenses and requires expansion purchases to match that platform route. ([support.na.square-enix.com](https://support.na.square-enix.com/faqarticle.php?id=xx.xx.&kid=xx.xx&page=xx.xx&sc=xx.xx))

23.7. Valve Corporation

[redacted] For an external publisher, the commercially important capability is Steam's documented admission route: the contracting entity must own or hold adequate publishing rights, supply matching identity, banking, and tax information, accept the distribution agreement, and complete the applicable review. Admission enables distribution; it does not establish demand for a particular title or hardware availability in every country.

[redacted] Resellers should verify their legitimate supply relationship rather than treating possession of a key as proof of authorized distribution. This route provides another

purchasing location but preserves Steam activation and publisher responsibilities; direct Steam checkout avoids that particular reseller relationship.

Sources & Evidence

1. Onboarding - Steamworks Documentation
   - Steam onboarding requires a rights-holding contracting entity, matching legal and banking identity, tax information, distribution agreement acceptance, and review. These are admission conditions, not evidence of demand for a particular game. ([partner.steamgames.com](https://partner.steamgames.com/doc/gettingstarted/onboarding))
2. Steam Keys - Steamworks Documentation
   - Steam Keys allow external-store or retail purchases to activate a Steam product license. The documentation retains publisher key-management responsibilities and states that additional key requests receive case-by-case review without guaranteed approval. ([partner.steamgames.com](https://partner.steamgames.com/doc/features/keys))
3. About Us - Valve Corporation
   - Valve identifies its games, Steam, and hardware businesses, including Counter-Strike xx.xx Dota xx.xx and Steam Deck. The portfolio does not establish hardware availability in every country. ([valvesoftware.com](https://www.valvesoftware.com/en/about))
   - Company verification: Valve identifies games, Steam, and gaming hardware as its businesses.
   - Company verification: Named hardware includes Steam Deck and Valve Index.

23.8. Epic Games, Inc.

[illegible] That geographic distinction matters to publishers evaluating Epic as an alternative mobile distributor: the storefront's presence does not establish identical device access or title availability worldwide. Unreal Engine's broader activities should not be treated as additional included Gaming offerings merely because they share the company identity.

Apple's regional rules require both an eligible Apple Account country setting and physical presence in the relevant eligible region for alternative marketplace installation. [illegible] Epic's consumer installation pages do not establish admission for a proposed third-party game or the complete contract governing its distribution.

Sources & Evidence

1. About Epic Games
   · Epic Games identifies Fortnite and Epic Games Store alongside Unreal Engine activities spanning gaming and nongaming industries. This supports separating included game and distribution relationships from adjacent engine activities. ([epicgames.com](https://www.epicgames.com/site/about?lang=en-US))
   · Company verification: Epic identifies Fortnite, Unreal Engine, Epic Games Store, and Epic Online Services as its offerings.
   · Company verification: These establish game publishing, distribution, and developer-facing commercial roles.
2. Download Epic Games for Mobile - Epic Games Store
   · Epic's mobile storefront page advertises global Android availability while identifying iPhone access as limited to supported regions. This is an offering statement, not evidence of adoption or identical catalogs. ([store.epicgames.com](https://store.epicgames.com/mobile?lang=en-US))
3. Download Epic Games for iOS & iPhone - Epic Games Store
   · Epic's iOS guidance identifies iPhone and iPad availability in the European Union and iPhone availability in Japan and Brazil, with compatible-device requirements. Consumer installation guidance does not establish admission or commercial terms for a proposed third-party title. ([store.epicgames.com](https://store.epicgames.com/mobile/ios))
4. About Alternative App Distribution - Apple Support
   · Apple requires eligible account-country settings and physical presence for alternative marketplaces in Brazil, Japan, and the EU. Marketplace or app developers handle relevant purchasing support and refunds; ordinary App Store purchasing features are not fully replicated. ([support.apple.com](https://support.apple.com/en-ca/xx.xx))

23.9. Roblox Corporation

[redacted] Its 2025 filing describes hosting, distribution, discovery, customer support and certain payment services. A brand commissioning an experience must distinguish its agreement with the creator from Roblox's platform and advertising relationships.

Advertising procurement is format-specific. [redacted] Agencies should confirm the placement, purchasing relationship, audience eligibility and reporting commitment before authorizing a campaign; an advertised format does not establish campaign effectiveness.

Creator payment is a separate commercial gate. [redacted] Participation does not create an unconditional payment entitlement.

Sources & Evidence

1. Roblox Expands Advertising Platform as Essential Channel for the Next Generations
   · The January xx.xx 2026 disclosure distinguishes available Rewarded Video from closed-beta Homepage Feature and describes programmatic purchasing relationships. It does not independently establish campaign effectiveness.
   ([about.roblox.com](https://about.roblox.com/newsroom/2026/xx.xx/roblox-expands-advertising-platform))
2. Developer Exchange Terms of Use - Roblox
   · Developer Exchange requires qualifying Earned Robux, account and tax documentation, continuing compliance and discretionary cash-out review; purchased Robux are excluded from qualifying earnings.
   ([en.help.roblox.com](https://en.help.roblox.com/hc/en-us/articles/xx.xx-Developer-Exchange-Terms-of-Use))
3. Roblox Corporation Form 10-K - Year Ended December 31, 2025
   · Roblox describes creator-operated content and platform services including hosting, distribution, discovery, customer support and certain payment services. Its filing distinguishes player purchases, advertising and creator compensation. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/rblx-xx.xx.htm))
   · Company verification: Roblox Corporation's 2025 Form xx.xx-K establishes its platform business, virtual economy, and creator ecosystem.
   · Company verification: The filing supports participation as a platform operator rather than treating all independent creators as company subsidiaries.
4. Immersive Ads on Roblox
   · Roblox's advertiser portfolio presents Rewarded Video, labels Homepage Feature as beta, and describes programmatic and managed-service campaign routes.
   ([brands.roblox.com](https://brands.roblox.com/advertising))

23.10. Apple Inc.

Apple combines game distribution through the App Store with the separate Apple Arcade subscription. Arcade includes named games such as Sneaky Sasquatch and Hello Kitty Island Adventure without advertising or in-app purchases. ■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■ ■■ ■■■■■■■■ ■■■■ ■■■■■■■■■ ■■ ■■■■■ ■■■■ ■■■■■■■■■ ■■ ■■■■■ ■■■■■■■■

For EU mobile-game publishers, alternative distribution changes the intermediary without eliminating Apple-controlled conditions. ■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■ ■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■

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Sources & Evidence

1. Changes for Apps in the European Union - Apple Developer
   · Apple's EU terms effective October xx.xx 2026 permit alternative marketplaces and authorized website distribution while retaining notarization, eligibility and qualifying commissions. Apple In-App Purchase includes processing, tax support and customer service. ([developer.apple.com](https://developer.apple.com/support/apps-in-the-eu/))
2. Apple Arcade
   · Apple Arcade is a subscription game library without advertising or in-app purchases. Its portfolio names Sneaky Sasquatch and Hello Kitty Island Adventure and identifies supported Apple devices. ([apple.com](https://www.apple.com/apple-arcade/))
   · Company verification: Apple markets Apple Arcade as a subscription providing access to games across supported Apple devices.
   · Company verification: The catalog identifies named games and distinguishes the subscription from advertising-supported and in-app-purchase models.
3. Commission Finds Apple and Meta in Breach of the Digital Markets Act
   · On April xx.xx 2025, the European Commission found Apple's then-applicable steering restrictions noncompliant and required their removal. This dated decision does not adjudicate subsequently published October 2026 terms. ([ec.europa.eu](https://ec.europa.eu/commission/presscorner/api/files/document/print/en/ip_25_1085/IP_25_1085_EN.pdf))
4. UK Competition and Markets Authority - Apple Mobile Platform Final Decision Report, 2025
   · Company verification: The decision examines Apple's App Store as a mobile distribution channel relevant to games.

23.11. NVIDIA Corporation

■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■ Applicable paid games require a separate supported-store entitlement; free-to-play titles provide another route. Membership therefore adds remote access rather than purchasing every desired game.

■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ Buyers and bundle providers should verify the local operator, supported title and membership before promising access. A supported device alone does not establish territorial or content eligibility.

Standard Performance and Ultimate memberships have monthly premium-use allowances, while qualifying Founders memberships receive different treatment. ■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■ ■■■■■■■■■■ ■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■ ■■■ ■■■■■ ■■■■ ■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■ ■■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ Local execution avoids this streaming entitlement but requires suitable equipment and the relevant game rights.

Sources & Evidence

1. GeForce NOW FAQs
   · GeForce NOW requires supported-store entitlements for applicable paid games, supports multiple device categories, and distinguishes NVIDIA-operated from Alliance-partner territories. Qualifying Founders memberships have different premium-use treatment. ([nvidia.com](https://www.nvidia.com/en-us/geforce-now/faq/))
2. Membership Terms for GeForce NOW
   · NVIDIA Corporation's membership terms impose monthly premium-use allowances and permit additional premium time or continued play with free-member features after exhaustion. ([nvidia.com](https://www.nvidia.com/en-us/geforce-now/membership-terms/))
3. GeForce NOW at CES: Linux, Amazon Fire TV | NVIDIA Blog
   · Company verification: NVIDIA's January xx.xx 2026 announcement establishes GeForce NOW as an operating cloud-gaming service.
   · Company verification: The announcement discusses expansion across supported consumer devices.
4. UK Competition and Markets Authority - Apple Mobile Platform Final Decision Report, 2025
   · Company verification: The decision identifies NVIDIA GeForce NOW among major cloud-gaming platforms.

23.12. Meta Platforms, Inc.

[redacted] Its 2025 filing places these offerings within Reality Labs, alongside broader activities that should not automatically be attributed to Gaming. Meta's UK storefront markets Quest 3S and Quest xx.xx supporting an equipment-and-content ecosystem rather than a content-only relationship.

Meta's September 2024 Quest 3S announcement committed compatibility with the then-existing Quest application and game library. This provides a documented continuity proposition for an existing Quest customer, but it is not a perpetual guarantee for every title or a promise of purchase transfer across XR ecosystems. [redacted]

The UK storefront separately describes a Meta Horizon+ trial with eligibility and automatic-renewal conditions. Retailers should distinguish headset ownership, individual game purchases and subscription access, and verify the local seller and support terms before packaging them together. [redacted]

Sources & Evidence

1. Introducing Meta Quest 3S, Our Most Affordable Mixed Reality Headset
   · Meta's September 2024 Quest 3S announcement commits compatibility with the existing Quest application and game library. The statement is a dated compatibility commitment, not a permanent availability guarantee. ([about.fb.com](https://about.fb.com/news/2024/xx.xx/meta-quest-3s-our-most-affordable-mixed-reality-headset/))
2. Meta Platforms, Inc. Form 10-K - Year Ended December 31, 2025
   · Meta's consolidated filing identifies Quest devices and Meta Horizon Store software and content within Reality Labs, supporting group-level gaming participation without attributing every Reality Labs activity to Gaming. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/meta-xx.xx.htm))

3. Family and Child-Friendly VR Games for Family Game Night - Meta Store
   · Meta's UK storefront markets Quest 3S and Quest xx.xx and distinguishes hardware from a Meta Horizon+ trial subject to eligibility and automatic renewal. ([meta.com](https://www.meta.com/quest/family/))
4. Meta Quest VR Headsets and Accessories | Meta Store
   · Company verification: Meta's official store presents the Meta Quest VR headset and accessory product family.
   · Company verification: This establishes a dedicated gaming-platform hardware connection; the precise selling-entity and consolidated-parent attribution remain open.

23.13. Playtika Holding Corp.

[redacted] Its 2025 filing describes free-to-play games with optional virtual-item purchases and no in-game real-money winnings. The purchasing benefit is an in-game entitlement, not cash redemption.

The filing also reports a February xx.xx 2026 Washington attorney general lawsuit against Playtika and subsidiaries, following an earlier allegation letter. The allegations are not a judgment. [redacted]

Sources & Evidence

1. Playtika Holding Corp. Form 10-K - Year Ended December 31, 2025
   · Playtika describes free-to-play games with optional virtual-item purchases and no in-game real-money winnings. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/playtika-xx.xx.htm))
   · The filing reports a February xx.xx 2026 Washington attorney general lawsuit against Playtika and subsidiaries, following an earlier allegation letter. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/playtika-xx.xx.htm))
   · Company verification: Playtika Holding Corp.'s 2025 Form xx.xx-K establishes a free-to-play game business monetized through optional virtual-item purchases.
   · Company verification: The filing identifies Bingo Blitz and the company's broader game portfolio.
2. Playtika - Games Lobby
   · Playtika's official portfolio identifies Slotomania, Bingo Blitz and Best Fiends; portfolio presentation does not establish unrestricted local availability. ([playtika.com](https://www.playtika.com/games/))

23.14. Corsair Gaming, Inc.

Corsair supplies gaming keyboards, mice and headsets, SCUF controllers, and Fanatec racing wheels, pedals and related systems. [redacted] This provides a specialist equipment-complement portfolio distinct from a console platform; PC components and creator-production equipment remain adjacent to the studied peripheral offerings.

Fanatec's commercial compatibility guidance makes the purchasing condition specific: PlayStation requires a licensed wheel base, while Xbox requires a licensed steering wheel. [redacted] The modular ecosystem supports equipment choices but retains dependencies between compatible products.

Support also belongs to the actual purchase relationship. Fanatec's consumer guarantee names Corsair GmbH and covers qualifying purchases through direct or authorized channels. ■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■

Sources & Evidence

1. Corsair Gaming, Inc. Form 10-K - Year Ended December 31, 2025
   · Corsair's mandatory filing identifies its branded peripheral business and consolidates Fanatec's results following the completed September 2024 acquisition. ([ir.corsair.com](https://ir.corsair.com/static-files/c0592257-5f03-xx.xx-8a5d-ddd86ff196c4))
2. CORSAIR Sustainability Report - December 2025
   · The December 2025 corporate portfolio identifies CORSAIR keyboards, mice and headsets, SCUF gaming controllers, and Fanatec racing wheels, pedals and systems. ([assets.corsair.com](https://assets.corsair.com/image/upload/v1770070464/akamai/landing/social-impact/pdf/NEW_CRSR_Sustainability_Report_FINAL12.2025.pdf))
3. Understanding Compatibility: The Fanatec Ecosystem
   · Fanatec's commercial guidance requires a licensed wheel base for PlayStation and a licensed steering wheel for Xbox, supporting complete-package compatibility assessment rather than brand-level assumptions. ([fanatec.com](https://www.fanatec.com/us/en/explorer/products/racing-wheels-wheel-bases/the-fanatec-ecosystem/))
4. Fanatec Consumer Guarantee
   · Fanatec's guarantee names Corsair GmbH, applies to qualifying direct or authorized-channel purchases, distinguishes refurbished coverage, and limits bundle remedies to the affected individual product. ([help.fanatec.com](https://help.fanatec.com/hc/en-us/articles/xx.xx-Fanatec-Consumer-Guarantee))

23.15. Netflix, Inc.

Netflix supplies gaming within its broader entertainment membership rather than through a separate game-only subscription. ■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■■ ■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■ ■■ ■■■■ ■■■■■■■■■■■ ■■ ■■■■■■ ■■■■■■■■■■ The official catalog lists named offerings including Storyteller and OXENFREE, but a catalog entry does not establish availability for every account or territory.

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Existing members should assess the desired title, profile eligibility and device before purchasing another gaming service. Membership inclusion removes a separate game-subscription relationship for eligible offerings, but retains dependence on Netflix account access and the relevant catalog. ■■■■■■■ ■■■■ ■■■■■■ ■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■ ■■■■■■■■ ■ ■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■ ■■■■■■■■■

Sources & Evidence

1. Netflix, Inc. Form 10-K - Year Ended December 31, 2025
   · Netflix's consolidated filing identifies games within its broader entertainment-service offering, establishing parent-level participation without proving every title's operating entity or territorial rights. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/nflx-xx.xx.htm))
2. Play Games on Mobile Devices
   · Netflix mobile games require active membership and compatible devices, exclude advertising and in-app purchases, and are affected by profile eligibility. Progress from previously released versions cannot transfer to the Netflix version. ([help.netflix.com](https://help.netflix.com/en/node/xx.xx))
3. Play Games on TVs and Computers
   · Netflix describes TV and computer gaming as a country- and device-limited beta, lists the United States and United Kingdom among supported countries, and requires phones or tablets rather than gamepads as TV controllers. ([help.netflix.com](https://help.netflix.com/en/node/xx.xx))
4. All of the Games on Netflix Right Now
   · Netflix's official game catalog lists Storyteller and OXENFREE. Those listings establish presented offerings, not universal account, country or device availability. ([netflix.com](https://www.netflix.com/tudum/games))
   · Company verification: Netflix maintains an official Netflix Games catalog, establishing a publicly presented gaming offering.
   · Company verification: The catalog alone does not establish the legal operating entity or availability in every assigned country.

23.16. Hasbro, Inc.

Hasbro combines internal digital-game commercialization with licensing-out. ■■■ ■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■ and Baldur's Gate xx.xx are partner-developed licensed games, not equivalent internal operating businesses.

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The 2025 filing classifies EXODUS and WARLOCK: DUNGEONS & DRAGONS as development projects. Commercial plans should await a completed release rather than treat that pipeline as available inventory. ■■■■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■

Sources & Evidence

1. Hasbro, Inc. Form 10-K - Fiscal Year Ended December 28, 2025
   · Hasbro distinguishes launched Arena from licensed MONOPOLY GO! and Baldur's Gate xx.xx identifies internal-development commitments, and classifies EXODUS and WARLOCK as development projects. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/has-xx.xx.htm))
2. Magic: The Gathering Arena
   · The official Magic: The Gathering Arena offering provides mobile, PC and Mac access, corroborating a marketed digital-game capability distinct from Hasbro's development pipeline. ([magic.wizards.com](https://magic.wizards.com/en/mtgarena))

3. It's Time to Take That Chance... MONOPOLY GO! Is Here!
   - Scopely's MONOPOLY GO! launch disclosure identifies Hasbro as its partner and Scopely as the game's creator, live operator and publisher, corroborating the separation of brand rights from execution. ([scopely.com](https://www.scopely.com/en/news/its-time-to-take-that-chance-monopoly-go-is-here))
4. Hasbro 2025 Annual Report
   - Company verification: Hasbro's 2025 annual report establishes its consolidated digital-game development, commercialization, and IP-licensing businesses.
   - Company verification: It identifies launched Magic: The Gathering Arena and licensing relationships for MONOPOLY GO! and Baldur's Gate xx.xx.
   - Company verification: The report distinguishes those commercial activities from physical games and from EXODUS and WARLOCK development projects.

23.17. The New York Times Company

The New York Times Company supplies Games as a distinct puzzle product with standalone and cross-service subscription routes. ■■■ ■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■ ■■■■■■■ ■■■■■■■ ■■■■■■■ This creates a focused puzzle-access proposition rather than requiring every player to purchase news access.

The US NYT Games app listing identifies the company as developer and seller and advertises subscriber puzzle archives. A household seeking daily free-entry play has a different purchasing need from one seeking archive access. ■■■■■■ ■■■■■■ ■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■■■■■ ■■■■■■■

Standalone access isolates the gaming benefit; a cross-service bundle is appropriate when the household also values the accompanying products. ■■■■ ■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■ ■■■■■■ ■ ■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■■■ ■■■■■■■ Competitive comparisons should therefore distinguish the Games offering from the company's broader news and lifestyle activities.

Sources & Evidence

1. The New York Times Company Form 10-K - Year Ended December 31, 2025
   - The filing identifies Games as the company's puzzle product and describes Wordle and Connections as free content within a subscription-oriented access model. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/nyt-xx.xx.htm))
2. The New York Times Company Form 10-Q - Quarter Ended June 30, 2026
   - The second-quarter 2026 filing describes Games within a digital bundle and as an available standalone digital subscription, supporting the distinction between gaming and cross-service access. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/nyt-xx.xx.htm))
3. NYT Games: Wordle & Crossword - US App Store
   - The US app listing identifies The New York Times Company as developer and seller and advertises subscriber archives for named puzzle games. ([apps.apple.com](https://apps.apple.com/us/app/nyt-games-wordle-crossword/id307569751))

23.18. Nuuvem

Nuuvem separates regional selling responsibility from the platform on which a game is activated. ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■ ■■ ■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■ ■■■ ■■■■■■■■■■■■■ The publisher-facing offering adds merchant-of-record services, local payment methods, Portuguese and Spanish support, and distribution through keys, direct downloads or other supported arrangements.

■■■■■■■■ ■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■ ■■■■■■ ■■■ ■■■■ ■■ ■■■■■■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ Account-identification problems can require the platform's support rather than the retailer's intervention. Buyers should verify platform, country and edition before purchasing; DRM-free listings provide a different fulfillment relationship.

For a publisher lacking local payment administration or bilingual customer support, Nuuvem offers a specific regional intermediary rather than merely another checkout page. ■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■ ■■■■■ ■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ Publishers already covering these responsibilities may have less reason to introduce another intermediary.

Sources & Evidence

1. Nuuvem - About
   - The Brazilian storefront identifies Nuuvem Ltda. and states that Nuuvem is directly responsible for offers and transactions conducted through its service. ([secure.nuuvem.com](https://secure.nuuvem.com/br-pt/about))
   - Company verification: Nuuvem describes its Brazilian founding and the launch of its digital game store in 2011.
   - Company verification: The page identifies Nuuvem as responsible for offers and transactions conducted through its service.
2. Nuuvem: Seu Jogo no Mercado Latinoamericano
   - Nuuvem advertises merchant-of-record services, local payment methods, Portuguese and Spanish support, key and DRM-free distribution, and an option to contract with a US-based entity. ([nuuvem.com](https://www.nuuvem.com/lp/pt/partners))
3. Nuuvem - FAQ: Activation and Regional Restriction
   - Nuuvem documents product-specific activation platforms and country restrictions, redeemed-key account dependence, platform-support escalation, and a separate DRM-free download route. ([nuuvem.com](https://www.nuuvem.com/ca-en/support-faq-activation-regional-restriction))

23.19. Tamatem Games

■■■■■■■ ■■■■■ ■■■■■■ ■■ ■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ Its services combine cultural localization by in-house writers and specialists with marketing, analytics and continuing community support. VIP Baloot supplies a named commercial example: Tamatem markets it as a free-to-play multiplayer card game, and Google Play identifies Tamatem Inc. as its listed developer.

■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■ ■■ ■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■ ■■■■ ■■ ■■■■■■■■■ ■■■■■■■■ Tamatem's combined offering may address that requirement more directly than a translation-only engagement. A publisher retaining its own acquisition and community teams could instead purchase a narrower service and preserve more commercial control.

Before assigning a regional publishing mandate, the rights holder should specify the contracting entity, countries, license duration, content-approval authority and player-support responsibilities. The named storefront relationship establishes participation, not ownership of every underlying title or permission to distribute throughout MENA. ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■ ■■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■ ■■ ■■■■■■■■■■■■

Sources & Evidence

1. About Us - Tamatem Games
   - Tamatem describes partnerships with developers to localize and publish mobile games for Arabic-speaking audiences. This establishes its advertised publishing role, not territorial rights for every title. ([tamatem.co](https://tamatem.co/about-us/))
   - Company verification: Tamatem describes Arabic-language mobile-game localization and publishing.
   - Company verification: Its business history identifies launches including VIP Baloot and Battle of Kings.
2. Services - Tamatem Games
   - Tamatem advertises cultural localization by in-house writers and experts, marketing, analytics and community support. These are offered services, not independently established commercial outcomes. ([tamatem.co](https://tamatem.co/service/))
3. VIP Baloot - Tamatem Games
   - Tamatem's VIP Baloot product page presents a free-to-play multiplayer card game with social and community features. ([tamatem.co](https://tamatem.co/games/vip-baloot/))
4. VIP Baloot - Google Play
   - The Google Play listing for VIP Baloot identifies Tamatem Inc. as the developer and links the offering to Tamatem's business website. ([play.google.com](https://play.google.com/store/apps/details/?hl=en-US&id=co.tamatem.vipbaloot))
5. Tamatem Games | Contact Us - Tamatem Games
   - Company verification: The company lists an office at King Hussein Business Park in Amman, Jordan.

23.20. Carry1st

■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■■■ Its distinct contribution is the provision of several local audience and commercialization services, rather than an assumption that a global storefront already supplies them.

■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■ Carry1st's November xx.xx 2023 Activision announcement connected Call of Duty: Mobile purchases with local payment methods through Carry1st Shop and Pay1st. Activision's support guidance also lists Carry1st among purchase vendors or payment processors and directs unresolved purchase questions to the relevant provider. That recognition establishes a transaction channel, not ownership of Call of Duty or unrestricted regional publishing rights.

A publisher whose immediate gap is payment access can evaluate a transaction-service mandate without automatically assigning broader publishing authority. ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ Activision's regional limitations and alternative purchase routes make country eligibility, account compatibility and support ownership necessary conditions before committing.

Sources & Evidence

1. Publishing - Carry1st
   - Carry1st advertises localization, alternative distribution, acquisition support, community engagement and tailored live operations for African game audiences. ([carry1st.com](https://carry1st.com/publishing))
   - Company verification: Carry1st offers game-publishing and related market-entry services for African audiences. ([carry1st.com](https://carry1st.com/publishing))
2. Carry1st Teams up with Call of Duty: Mobile to Enable Local Payments Across Africa
   - Carry1st's November xx.xx 2023 announcement describes its Activision relationship and Call of Duty: Mobile purchases through Carry1st Shop using Pay1st and local payment methods; it specifies selected territories. ([carry1st.com](https://www.carry1st.com/press/carry1st-teams-up-with-call-of-duty-r-mobile-to-enable-local-payments-across-africa))
3. Issues with COD Points Purchases for Call of Duty: Mobile - Activision Support
   - Activision lists Carry1st among Call of Duty: Mobile purchase vendors or payment processors, directs unresolved purchase questions to the relevant provider, and warns of regional limitations. Other purchase routes are also listed. ([support.activision.com](https://support.activision.com/cod-mobile/articles/cod-points-purchases-call-of-duty-mobile))

23.21. Resolution Games

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Cross-platform participation retains separate access conditions. Resolution Games' March 2025 cross-play guidance lists supported platforms, and the PlayStation listing requires PlayStation Plus for online play. ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪

Purchase portability is narrower than participation compatibility. ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ The combined PlayStation package is a counterexample to blanket repurchase claims, not proof that every storefront shares rights or immersive modes.

Sources & Evidence

1. Is there cross-buy?
   · Resolution Games' cross-buy guidance, updated February xx.xx 2023, states that an Oculus Store purchase does not provide the Steam version. This is dated, storefront-specific guidance. ([resolutiongames.zendesk.com](https://resolutiongames.zendesk.com/hc/en-us/articles/xx.xx-Is-there-cross-buy))
2. Demeo - Your New Favorite Tabletop Adventure Game
   · Resolution Games presents Demeo as cross-platform cooperative content and advertises a mixed-reality offering for Quest. ([resolutiongames.com](https://www.resolutiongames.com/demeo))
3. What Demeo Platforms Have Cross-Play? - Resolution Games
   · The cross-play guidance updated March xx.xx 2025 lists supported Demeo platforms and conditions PlayStation participation on PlayStation Plus. ([resolutiongames.zendesk.com](https://resolutiongames.zendesk.com/hc/en-us/articles/xx.xx-What-Demeo-platforms-have-cross-play))
4. Demeo - PlayStation US
   · The US PlayStation offering identifies Resolution Games as publisher, includes PS5 and PS VR2 versions in the same purchase, and requires PlayStation Plus for online play. ([playstation.com](https://www.playstation.com/en-us/games/demeo/))
5. Games - Resolution Games
   · Company verification: Resolution Games' official catalog names Demeo, Demeo Battles, Racket Club, Game Room, and other games.
   · Company verification: The catalog identifies VR, mixed-reality, and other supported commercial platform categories.
6. About Us - Resolution Games
   · Company verification: Resolution Games describes itself as privately held and based in Stockholm, with an additional Swedish office.

23.22. Wube Software

Wube Software has a clear developer-to-offering relationship: Factorio's privacy policy names WUBE Software Ltd. as developer, and Companies House records that entity as active. ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■ ■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■

The direct route does not require abandoning platform access. ■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■ ■■■ ■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■ Buyers can therefore compare account and delivery relationships rather than treating direct producer sales and platform distribution as mutually exclusive.

■■■■■ ■■■ ■■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■ ■■■■ ■■■■■■■■ ■■■■ ■■ ■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■ Purchasers should check base-game ownership and the intended account relationship before buying the add-on. Direct delivery reduces reliance on a single storefront for downloads, but does not remove account eligibility or make an expansion a substitute for the base game.

Sources & Evidence

1. WUBE Software Ltd. - Factorio Privacy Policy
   - Factorio's privacy policy identifies WUBE Software Ltd., company number xx.xx as Factorio's developer. ([factorio.com](https://www.factorio.com/privacy-policy))
   - Company verification: Factorio's policy updated March xx.xx 2026 identifies WUBE Software Ltd. as Factorio's developer and repeats the matching UK company number.
   - Company verification: The policy identifies the company's Czech branch rather than a separate independent publisher.
2. WUBE SOFTWARE LTD - Companies House Overview
   - Companies House records WUBE SOFTWARE LTD, company number xx.xx as active. ([find-and-update.company-information.service.gov.uk](https://find-and-update.company-information.service.gov.uk/company/xx.xx))
   - Company verification: Companies House identifies WUBE SOFTWARE LTD, company number xx.xx as active and records its UK registered office.
3. Game Purchase - Factorio
   - Factorio's website purchase upgrades a customer account for direct downloads and permits Steam-key redemption; the offering includes DRM-free downloads. ([factorio.com](https://www.factorio.com/buy))
   - Company verification: Factorio's official purchase page offers the commercial game directly and identifies additional authorized distribution channels.
   - Company verification: The page links the game offering to the Wube Software-branded business.
4. FAQ - Factorio
   - Wube's FAQ identifies Steam and GOG as purchasing alternatives and describes website-account access for Steam purchasers, supporting coexistence of direct and platform relationships. ([factorio.com](https://www.factorio.com/support/faq))
5. Space Age Purchase - Factorio
   - Factorio: Space Age is sold as an expansion requiring ownership of the base game; its website purchase provides direct expansion downloads and permits Steam-key redemption. ([factorio.com](https://www.factorio.com/space-age/buy))

24. Companies Covered

Table 691. Global Gaming Market, Companies Covered

Company
1 Simple Game
11 bit studios S.A.
37 Interactive Entertainment
AccelByte
ACE Team
AEXLAB
Afterverse
Agate
AJB Games Studio
Amanotes
Amazon.com, Inc.
Amber
AN Games Studio
Annapurna Pictures
Antstream
AOne Games
Aonic
Apple Inc.
AppLovin Corporation
Ard Games
Arimac
Aristocrat Leisure Limited
ARUDEM
ARVORE Immersive Games Inc.
Asphere Innovations Public Company Limited
Astrum Entertainment
ASUS
Atari
AtlaStudio
Azerion Group N.V.

Table 691 - continued

Company
AZUR GAMES
Bamtang Games
Bandai Namco Holdings Inc.
Batovi Games Studio
Behaviour Interactive
Bermuda Island Games
Bigger Games
Bilibili
BJR Pixels Agency
Blacknut
Bloober Team
Bohemia Interactive
Boosteroid
Bromio
Buried Games
Candivore
CAPCOM CO., LTD.
Carry1st
CD PROJEKT S.A.
Chickmania
CI Games
CipSoft GmbH
Clockwork Acorn
Cloud Imperium Games
CM Games
Coda
Codigames
Coffee Stain
COGNOSPHERE PTE. LTD.
COLOPL
Com2uS
Com2uS Holdings

Table 691 - continued

Company
Cometa Games
ConcernedApe
Corsair Gaming, Inc.
Creatures
Creepy Jar
Crytek
CyberAgent, Inc.
Dark Dome
Dawawer
Dedalord
DeNA Co., Ltd.
Devolver Digital
Devolver Digital Inc.
Devsisters
Digital Bros
DigitalMania
Dimension11 Studios
Dinosaur Polo Club
Dizzy Gaming
Dope Apps
Dream Games
Dreamhaven
Dreams Uncorporated
Dumativa
DuoLabz
East Side Games Group Inc.
Electronic Arts Inc.
Embracer Group
Empty Head Games
Endnight Games
Epic Games, Inc.
Estoty

Table 691 - continued

Company
Etermax
Even Games
everplay plc
Exit Games GmbH
Facepunch Studios Ltd
Fair Play Labs
Fanatee
Fast Travel Games AB
Fingersoft
FRAG Games
Freaky Creations
Free Lives
Frictional Games
Frontier Developments plc
FRVR
Fugo
FunPlus
Funtap
FuratByte Studio
G-bits
G5 Entertainment AB (publ)
Gaijin Entertainment
Galactech
Gamabox
Gamania Digital Entertainment Co., Ltd.
Game District
GAME FREAK
Game Power 7
Gameberry Labs
Gamefam
Gameforge AG
Gameloft

Table 691 - continued

Company
Gameloft S.E.
Games2win
GameStream
Gamsole
Gara
GDEV
GIANTS Software GmbH
Gilgatron Studio
Gimzat
Globant
GN Group
GOG sp. z o.o.
Good Job Games
Google
Grand Games
Green Man Gaming
GSC Game World
Guillemot Corporation
GungHo Online Entertainment, Inc.
Habby
Haemimont Games
Halberd Studios
Halfbrick
Hammer Games
Hasbro, Inc.
Hello Games
Heroic Labs
Highbit Game Studio
Hinterland Studio Inc.
Hipster Whale Pty Ltd
HOMA GAMES SAS
Hooded Horse

Table 691 - continued

Company
Hoplon
HP
HTC
Hyper Hippo Entertainment Ltd.
HyperBeard, Inc.
Hypergryph
HYS Games
iCandy Interactive Limited
IGG
IguanaBee
Immutable
Innersloth LLC
Instinct Games
Inuaverse ApS
Inventix Games Holding SJSC
IO Interactive
Ironhide Game Studio
Istikan Studio
itch.io
Ivalice Studio
Jagex
JetSynthesys
Jiwe Studios
June Studio
Kaigan Games
Kakao Games
Kalypso Media Group GmbH
Kashkool Games
Kayfo Games
Keen Games
Kelbox Studio
Kevir Entertainment

Table 691 - continued

Company
Keywords Studios Limited
KHMERGAMING
Kiddo Education
Kingsoft Corporation Limited
Kiota Games
Kiro'o Games
KOEI TECMO HOLDINGS CO., LTD.
KONAMI GROUP CORPORATION
KRAFTON, Inc.
Kucheza Gaming
Kurechii
Larian Studios
LEAP Game Studios
LED Development Studios LLC.
Lenovo
Lesta Games
Leti Arts
LEVEL5 Inc.
Lienzo
Light & Wonder, Inc.
Lilith Games
Lingering Effect Studio
Logitech International S.A.
Loop Games
Ludeon Studios
Mad Hook
Mad Mimic
MAG Interactive
Maliyo Games
Manga Productions
Marvelous INC.
Masseka Game Studio

Table 691 - continued

Company
Maxflow BV
Maysalward
Medrick
Mega Crit Games
Mekan Games
Meta Platforms, Inc.
Metaboli
Mezan Studios
Microids
Microsoft Corporation
Mindstorm Studios
MIXI, Inc.
MobilityWare, LLC
mod.io Pty Ltd
Modern Times Group MTG AB
Moon Active
Moon Studios
MOONTON Games
Motion Miracles
MTN Group Limited
MY.GAMES
NACON
Navegante
Nazara Technologies Limited
NC Corporation
Nekki
NeocoreGames
NEOWIZ
NetEase, Inc.
Netflix, Inc.
Netmarble Corporation
NEXON Co., Ltd.

Table 691 - continued

Company
Next Level Studio
Niebla Games
Nintendo Co., Ltd.
Noohkema Interactive
Nordcurrent
Nordisk Games
Nuuvem
NVIDIA Corporation
NXT LYR
Nyamakop
Offworld Industries
Ogre Pixel
Outfit7
OV Entertainment Group
Overwolf
Owlcat Games
Paeezan Game Studio
paibandstudio.com
PAPAYA
Papergames
Paradise Game
Paradox Interactive
Passion Republic Games
Pearl Abyss
People Can Fly
Perfect World
PikPok
PinchPoint
Pixel Federation
PlayPerfect
Playrix
PlaySide Studios Limited

Table 691 - continued

Company
PLAYSTUDIOS
Playtika Holding Corp.
Pocket Gems
Pocketpair, Inc.
Poki B.V.
Polyarc, Inc.
Pomelo Games
PT Megaxus Infotech
PULLUP Entertainment
Pulsatrix Studios
Qasbah Labs
QCF Design
Qene Games
QUByte Interactive
Ranida Games
Ravegan
Rayark Inc.
Razer
Re-Logic
Rebellion
Red Barrels Inc.
Regnum Studio
Relic Entertainment
Remedy Entertainment Plc
Render Room
Resolution Games
Ribat Studios
Riseup Labs
Roblox Corporation
Rogue Snail
Room 8 Group
Rumbling Games Studio

Table 691 - continued

Company
RuneStorm
Saber Interactive
Sablo Studio
Sabotage Studio
Saibot Studios
Sandsoft
Savvy Games Group
SayGames
Schell Games
SCS Software
Sea Limited
Sea Monster
Seede XR
SEGA SAMMY HOLDINGS INC.
Selva Interactive
SFS Games
SHIFT UP
Shula Lab
SKRA W.L.L.
Sky Mavis
Skybound Games
Slitherine Software UK Ltd
Smilegate
SNK Corporation
Snowcastle Games
SOFT-WORLD INTERNATIONAL CORPORATION
Sony Group Corporation
Soulbros Studios
Sourena Games
Spoilz
Spritewrench
Spyke Games

Table 691 - continued

Company
SQUARE ENIX HOLDINGS CO., LTD.
SRG Studios
Stillfront Group AB
Studio MDHR
Sunna Entertainment
SuperGaming Pte Ltd
Supergiant Games
Survios
Tactile Games
Take-Two Interactive Software, Inc.
TaleWorlds Entertainment
Tamatem Games
Tapps Games
Team Cherry
Ten Square Games S.A.
Tencent Holdings Limited
Teravision Games
The Brotherhood
The Game Kitchen
The Game Storm Studios
The New York Times Company
The Pokémon Company
The Stonebot Studio
The Stories Studio
The Walt Disney Company
Theorycraft Games
Thunder Lotus
Tilting Point
tinyBuild
Tlön Industries
Toge Productions
Travian Games

Table 691 - continued

Company
Tripledot Studios
Turtle Beach
Twin Seas Interactive
Two Desperados
Ubisoft Entertainment SA
Ubitus
UMX Studio
Unity Software Inc.
Uplift Games
URK Studios
Usiku Games
ustwo games
Vakeeg Studio
Valve Corporation
Virtuos
VNG
Voldex
Voodoo
VRChat
Waraní Studios
Wargaming
Warner Bros. Games
WEBZEN
WEMADE
Whaleapp
Wildlife Studios
Wixel Studios
Wube Software
X-LEGEND
XD Inc.
Xsolla
Yalla Group Limited

Table 691 - continued

Company
Yarsa Games
YOOZOO Games
Yostar
Ziff Davis, Inc.

Sources & Evidence

1. EA Announces Completion of Acquisition by PIF, Silver Lake, and Affinity Partners
   - Company verification: Electronic Arts Inc. announced that its acquisition by the PIF, Silver Lake, and Affinity Partners consortium closed on August xx.xx 2026.
   - Company verification: The announcement identifies EA as a continuing interactive-entertainment operating company; common financial investors do not establish consolidation with Savvy Games Group.
   - Company verification: Electronic Arts announced completion of its acquisition by PIF, Silver Lake, and Affinity Partners on August xx.xx 2026.
   - Company verification: The announcement identifies EA as an operating interactive-entertainment company with game franchises and intellectual property.
2. NEXON Co., Ltd. - Notice of the 24th Annual General Meeting of Shareholders
   - Company verification: The March xx.xx 2026 shareholder notice establishes NEXON Co., Ltd., its FY2025 business and audited consolidated reporting perimeter.
   - Company verification: The business report identifies continuing MapleStory, Dungeon&Fighter, and FC franchise operations and controlled development and publishing subsidiaries.
   - Company verification: The report states that NXC was the largest shareholder but no longer qualified as Nexon's parent under the cited Japanese statutes at December xx.xx 2025.
3. KRAFTON、2026 年第 2 四半期の業績を発表
   - Company verification: KRAFTON JAPAN's July xx.xx 2026 company-authored release reports KRAFTON's consolidated second-quarter business results.
   - Company verification: The release identifies continuing PUBG franchise business and Subnautica xx.xx commercial activity, supporting a material PC and mobile gaming role.
4. 한국거래소 - 크래프톤 2026년 2분기 및 상반기 경영실적 발표
   - Company verification: The Korea Exchange record identifies KRAFTON as a securities-market issuer and records its July xx.xx 2026 second-quarter and first-half results presentation.
5. Netmarble - 4Q 2025 & FY 2025 Earnings Results
   - Company verification: Netmarble's February xx.xx 2026 presentation reports its consolidated FY2025 gaming business and geographic operations.
   - Company verification: The reported revenue-generating portfolio includes Seven Knights Re:BIRTH, MARVEL Contest of Champions, Solo Leveling: ARISE, and social-casino-themed games.
   - Company verification: The presentation distinguishes existing revenue-generating games from planned 2026 releases and identifies the financial information as unaudited.
6. MTG delivers strong Q2 with 6% pro forma growth and 24% adjusted EBITDA margin
   - Company verification: MTG's July xx.xx 2026 disclosure identifies Modern Times Group MTG AB (publ) and its continuing consolidated mobile-gaming business.
   - Company verification: The disclosure attributes operating performance to RAID: Shadow Legends and PlaySimple's named casual games and confirms Plarium's consolidation from February 2025.
   - Company verification: PlaySimple's possible listing is described as preparatory activity, not completed deconsolidation.

7. Operating segments - Embracer Group
   - Company verification: Embracer identifies Fellowship Entertainment and Embracer as its operating segments beginning with Q1 FY2026/xx.xx.
   - Company verification: Fellowship Entertainment's proposed spin-off is planned for calendar 2027; the page does not describe a completed separation.
   - Company verification: The current corporate description establishes continuing group-level development, publishing, and distribution of PC, console, and mobile games.
8. Embracer Group ceases all operations in Russia through the divestment of selected assets from the operative group Saber Interactive
   - Company verification: Embracer's March xx.xx 2024 transaction announcement identifies Beacon Interactive, controlled by Saber co-founder Matthew Karch, as the buyer.
   - Company verification: The transaction perimeter includes Saber-branded studios, Saber Interactive Inc., and Nimble Giant, with specified owned or licensed business assets.
   - Company verification: The announcement identifies the Saber assets intended to leave Embracer, supporting separation of the divested business from Embracer's retained operations.
9. Embracer Group completes the divestment of selected assets from the operative group Saber Interactive
   - Company verification: Embracer announced completion of the selected Saber-asset divestment on March xx.xx 2024, establishing completion rather than an agreement alone.
   - Company verification: The completed divestment establishes that the specified transferred Saber business should not be attributed to Embracer merely because of historical ownership.
10. Paradox Interactive - Interim Report January-March 2025
    - Company verification: Paradox's January-March 2025 interim report records its completed acquisition of all Haemimont Games shares.
    - Company verification: The report establishes Paradox's consolidated publishing business and revenue-generating Cities: Skylines, Crusader Kings, Hearts of Iron, and Stellaris franchises.
    - Company verification: The report establishes Haemimont's acquisition into Paradox and therefore a parent/subsidiary reporting overlap with the staged Paradox identity.
    - Company verification: The report separately records acquisition of Stranded: Alien Dawn publishing rights from Frontier after the quarter.
11. Skydance Corporation - Form 8-K filed October 13, 2026
    - Company verification: Skydance's October xx.xx 2026 Form xx.xx-K confirms that its acquisition of Warner Bros. Discovery closed October xx.xx 2026 and that WBD survived as a wholly owned subsidiary.
    - Company verification: This resolves completion of the relevant corporate transaction, but does not independently identify Warner Bros. Games' contracting entities or post-merger game-rights allocation.
12. Hasbro 2025 Annual Report
    - Company verification: Hasbro's 2025 annual report establishes its consolidated digital-game development, commercialization, and IP-licensing businesses.
    - Company verification: It identifies launched Magic: The Gathering Arena and licensing relationships for MONOPOLY GO! and Baldur's Gate xx.xx.
    - Company verification: The report distinguishes those commercial activities from physical games and from EXODUS and WARLOCK development projects.
13. Dream Games Terms of Service
    - Company verification: Dream Games' terms effective March xx.xx 2026 identify Dream Games Dijital Teknolojiler A.Ş. in Istanbul as the operating business.
    - Company verification: The terms establish commercial mobile-game services and virtual-item monetization, with Royal Match and Royal Kingdom linked in the company's product navigation.
14. A look back on Balderton's investment in Dream Games
    - Company verification: Balderton's account of its own investment exit states that CVC's acquisition of venture-capital stakes in Dream Games was completed.
    - Company verification: The account connects Dream Games to continuing Royal Match and Royal Kingdom business without relying on its comparative-ranking claims.

15. White & Case Advises Dream Games on Strategic Investment by CVC
    - Company verification: White & Case's May xx.xx 2025 account of its own advisory engagement identifies Dream Games as developer and publisher of Royal Match and Royal Kingdom.
    - Company verification: The transaction description identifies CVC as the sole equity partner and distinguishes equity investment from debt financing.
16. CipSoft - Company: Our Evolution
    - Company verification: CipSoft's company history identifies CipSoft GmbH, continuing founder shareholding, and independence from external investors.
    - Company verification: The current business description identifies Tibia, TibiaME, and its takeover of The Settlers Online operations in 2025.
17. CipSoft - Tibia Summer Update 2026 Brings Infinitely Difficult Bosses
    - Company verification: CipSoft's July xx.xx 2026 release announces an available Tibia update from Regensburg, establishing continuing live-game operations.
18. G5 Games - Terms of Service
    - Company verification: G5's terms identify G5 Entertainment AB and its subsidiaries and affiliates as the businesses licensing games through G5's website and third-party channels.
    - Company verification: The terms establish the connection between the listed group identity, its consumer-game services, and G5 Store.
19. Available games - G5 Entertainment
    - Company verification: G5's availability page updated March xx.xx 2026 lists Hidden City, Sherlock, Jewels of Rome, Mahjong Journey, and other operated games.
20. WUBE SOFTWARE LTD - Companies House overview
    - Company verification: Companies House identifies WUBE SOFTWARE LTD, company number xx.xx as active and records its UK registered office.
21. WUBE SOFTWARE LTD - Factorio Data Privacy Policy
    - Company verification: Factorio's policy updated March xx.xx 2026 identifies WUBE Software Ltd. as Factorio's developer and repeats the matching UK company number.
    - Company verification: The policy identifies the company's Czech branch rather than a separate independent publisher.
22. Game purchase - Factorio
    - Company verification: Factorio's official purchase page offers the commercial game directly and identifies additional authorized distribution channels.
    - Company verification: The page links the game offering to the Wube Software-branded business.
23. Pixel Federation EULA - Terms and Conditions of Game Usage
    - Company verification: Pixel Federation's EULA identifies PIXEL FEDERATION, s.r.o., a Slovak limited-liability company with a Bratislava address, as the game-services operator.
24. About Pixel Federation - Pioneers in Creative Gaming
    - Company verification: Pixel Federation's official portal presents TrainStation xx.xx TrainStation xx.xx Diggy's Adventure, and other game offerings.
    - Company verification: The portal provides game access and game-specific shop links, improving the previously missing company-to-offering connection.
25. Microsoft 2025 Annual Report
    - Company verification: Microsoft's FY2025 report identifies gaming operations across PC, console, mobile, and cloud, including Xbox Game Pass and first-party content.
    - Company verification: The report discusses Xbox hardware and the Activision Blizzard acquisition within Microsoft's gaming business.

26. Sony Corporate Report 2025
    - Company verification: Sony's Game & Network Services business encompasses PlayStation hardware, game software, add-on content, network services, and first-party studios.
    - Company verification: The report describes PlayStation Store and PlayStation Plus as commercial platform offerings.
27. Nintendo Co., Ltd. Annual Report 2026
    - Company verification: Nintendo's FY2026 annual report identifies its dedicated video-game hardware and software business.
    - Company verification: The report records Nintendo Switch xx.xx named game releases, and Nintendo Switch Online as commercial offerings.
28. Tencent Holdings Limited Interim Report 2026
    - Company verification: Tencent's 2026 interim report separately reports Domestic Games and International Games operations.
    - Company verification: The report identifies Honour of Kings among its gaming activities and defines Supercell as a non-wholly-owned subsidiary.
29. NetEase Announces Fourth Quarter and Fiscal Year 2025 Unaudited Financial Results
    - Company verification: NetEase reports games and related value-added services as a business activity in its fiscal 2025 results.
    - Company verification: The release discusses operation of Blizzard titles in China and NetEase's broader game portfolio.
30. Corporate Profile | Take-Two Interactive Software, Inc.
    - Company verification: Take-Two identifies itself as a developer and publisher of interactive entertainment for consumers globally.
    - Company verification: Its operating labels include Rockstar Games, 2K, and Zynga; its investor page also identifies NBA 2K27 as a released product.
31. Ubisoft Reports Full-Year 2025-26 Earnings Figures
    - Company verification: Ubisoft's fiscal 2025-xx.xx results establish an ongoing game-publishing business and discuss its franchise portfolio and operating structure.
    - Company verification: The release identifies Assassin's Creed-related commercial activity and a future release lineup, which must be distinguished from already released offerings.
    - Company verification: Ubisoft's May xx.xx 2026 full-year release establishes continuing game commercialization and discusses its Creative Houses operating-model transition.
    - Company verification: The release identifies released franchise offerings separately from discontinued projects, delayed projects, and future releases.
32. Digital Unit | Integrated Report 2025 | Bandai Namco Holdings Inc.
    - Company verification: Bandai Namco Holdings describes its Digital Unit's network content and home-console game business.
    - Company verification: Named commercial products include ELDEN RING SHADOW OF THE ERDTREE and DRAGON BALL Sparking! ZERO.
33. SEGA SAMMY Integrated Report 2025 - Growth Strategy
    - Company verification: SEGA SAMMY's 2025 growth-strategy report describes its Entertainment Contents game business.
    - Company verification: The report discusses SONIC X SHADOW GENERATIONS and the group's mobile-game activities, including Rovio.
34. Digital Entertainment | SQUARE ENIX HOLDINGS CO., LTD.
    - Company verification: Square Enix describes planning, development, distribution, and operation of digital entertainment, primarily games, through international operations.
    - Company verification: Named offerings include FINAL FANTASY, DRAGON QUEST, KINGDOM HEARTS, and NieR.

35. Business Segments | Corporate Information | CAPCOM
    - Company verification: Capcom's business disclosure, dated May xx.xx 2026, identifies development and sale of digital game content for home-console and PC platforms.
    - Company verification: It also identifies mobile-content management and IP licensing as commercial activities.
36. Digital Entertainment Business | KONAMI GROUP CORPORATION
    - Company verification: Konami's Digital Entertainment business develops and distributes console, mobile, and other video games across multiple regions.
    - Company verification: Its named portfolio includes eFootball, SILENT HILL, and digital Yu-Gi-Oh! games.
37. Products | NEXON
    - Company verification: Nexon's official product portfolio identifies MapleStory, Dungeon&Fighter, and Mabinogi.
    - Company verification: The portfolio describes commercial services in multiple Asian markets.
38. Netmarble Games | Netmarble Company
    - Company verification: Netmarble's official games catalog identifies mobile, PC, and console game offerings and service regions.
    - Company verification: Named products include Solo Leveling: ARISE, Game of Thrones: Kingsroad, and Seven Knights-related games.
39. NC Announces Financial Results for Second Quarter 2026
    - Company verification: NC's second-quarter 2026 results establish continued PC and mobile game operations.
    - Company verification: The release discusses Lineage Classic and the company's existing game-IP business separately from upcoming titles.
40. 【韓国 NC】次世代に向け新たな価値を創出していくという意志を込めて社名を『NCSOFT』から『NC』へ変更
    - Company verification: The company's April xx.xx 2026 announcement reports its name change from NCSOFT to NC.
    - Company verification: The announcement supports use of NC Corporation rather than preserving the former company name as a separate participant.
41. Games | Pearl Abyss
    - Company verification: Pearl Abyss maintains an official video-game portfolio including Black Desert.
    - Company verification: The catalog establishes the company's named game offerings without treating every listed future project as a marketed release.
42. HoYoverse Privacy Policy
    - Company verification: The official HoYoverse privacy policy identifies Cognosphere Pte. Ltd. in Singapore.
    - Company verification: It names gaming products including Genshin Impact, Honkai: Star Rail, and Zenless Zone Zero.
43. Sea First Quarter 2026 Results Deck
    - Company verification: Sea's first-quarter 2026 results presentation identifies Garena as its digital-entertainment business.
    - Company verification: The presentation attributes Garena's operating performance to Free Fire and other gaming activity.
44. About Us | Valve Corporation
    - Company verification: Valve identifies games, Steam, and gaming hardware as its businesses.
    - Company verification: Named hardware includes Steam Deck and Valve Index.
45. About Epic Games
    - Company verification: Epic identifies Fortnite, Unreal Engine, Epic Games Store, and Epic Online Services as its offerings.
    - Company verification: These establish game publishing, distribution, and developer-facing commercial roles.

46. Roblox Corporation Form 10-K for the Year Ended December 31, 2025
    - Company verification: Roblox Corporation's 2025 Form xx.xx-K establishes its platform business, virtual economy, and creator ecosystem.
    - Company verification: The filing supports participation as a platform operator rather than treating all independent creators as company subsidiaries.
47. Scopely Completes Acquisition of Niantic's Games Business | Savvy Games Group
    - Company verification: Savvy identifies Scopely as its wholly owned entity.
    - Company verification: The announcement records completion of Scopely's acquisition of Niantic's games business, including named location-based games.
48. Apple Arcade | Apple
    - Company verification: Apple markets Apple Arcade as a subscription providing access to games across supported Apple devices.
    - Company verification: The catalog identifies named games and distinguishes the subscription from advertising-supported and in-app-purchase models.
49. Google Announces Google Play Paid Games Updates
    - Company verification: Google's March 2026 business announcement describes paid-game distribution and Google Play Games on PC.
    - Company verification: The source establishes Google's game-distribution role, not a standalone Alphabet-level gaming revenue figure.
50. Everything You Need to Know About Amazon Luna
    - Company verification: Amazon identifies Luna as its cloud-gaming service.
    - Company verification: The article was updated September xx.xx 2026 and lists availability in named North American and European countries.
51. GeForce NOW at CES: Linux, Amazon Fire TV | NVIDIA Blog
    - Company verification: NVIDIA's January xx.xx 2026 announcement establishes GeForce NOW as an operating cloud-gaming service.
    - Company verification: The announcement discusses expansion across supported consumer devices.
52. Meta Quest VR Headsets and Accessories | Meta Store
    - Company verification: Meta's official store presents the Meta Quest VR headset and accessory product family.
    - Company verification: This establishes a dedicated gaming-platform hardware connection; the precise selling-entity and consolidated-parent attribution remain open.
53. Playtika Holding Corp. Form 10-K for the Year Ended December 31, 2025
    - Company verification: Playtika Holding Corp.'s 2025 Form xx.xx-K establishes a free-to-play game business monetized through optional virtual-item purchases.
    - Company verification: The filing identifies Bingo Blitz and the company's broader game portfolio.
54. Playrix Press Kit - English
    - Company verification: Playrix's official press kit identifies it as an international mobile-game developer.
    - Company verification: Named products include Gardenscapes, Homescapes, Fishdom, Manor Matters, and Township.
55. About Us | Dream Games
    - Company verification: Dream Games identifies Royal Match and Royal Kingdom as its mobile games.
    - Company verification: Its official company page identifies offices in Istanbul and London.
56. About | Embracer Group
    - Company verification: Embracer maintains an official corporate identity page under the Embracer Group name.
    - Company verification: This record does not by itself resolve the current post-restructuring portfolio or Coffee Stain reporting perimeter.

57. Our Company | Paradox Interactive
    - Company verification: Paradox Interactive's official company page establishes its video-game development and publishing business.
58. Information About Wargaming
    - Company verification: Wargaming's official company page establishes its online-game development and publishing business.
    - Company verification: Its commercial portfolio includes World of Tanks and World of Warships.
59. About | Gaijin Entertainment
    - Company verification: Gaijin Entertainment's official company page identifies its game-development and publishing business.
60. About Behaviour Interactive - Independent Game Publisher
    - Company verification: Behaviour Interactive's official About page establishes its identity as an independent game publisher.
61. Game | CyberAgent, Inc.
    - Company verification: CyberAgent's official Game business page establishes a group-level game business and presents its game-related operations and offerings.
62. About Razer - Company History and Identity
    - Company verification: Razer's official company page identifies a gaming-focused hardware, software, and services business.
    - Company verification: Its commercial positioning establishes participation in the dedicated gaming-device and peripheral ecosystem, not inclusion of all such revenue in the market denominator.
63. Unity Plans and Pricing: Pro, Personal, Enterprise, Industry
    - Company verification: Unity's commercial product page offers plans including Unity Pro and Enterprise.
    - Company verification: These establish a developer-facing software supplier role rather than direct proof of consumer game publishing.
64. About Us | Keywords Studios Limited
    - Company verification: Keywords Studios Limited's official company page establishes its external services role in the video-game industry.
65. European Commission: Acquisition of Activision Blizzard by Microsoft, Subject to Conditions
    - Company verification: The European Commission's May xx.xx 2023 merger decision discusses Microsoft's console, game-distribution, and cloud-gaming activities.
    - Company verification: The same decision independently identifies Sony's console-game competitive position and games catalog in the EEA at that time.
66. UK Competition and Markets Authority - Apple Mobile Platform Final Decision Report, 2025
    - Company verification: The 2025 UK competition decision identifies Xbox Cloud Gaming as a cloud-gaming channel.
    - Company verification: The decision identifies Ubisoft as a developer distributing games through cloud-gaming services.
    - Company verification: The decision identifies EA as a developer distributing games through cloud-gaming services.
    - Company verification: The decision examines Apple's App Store as a mobile distribution channel relevant to games.
    - Company verification: The decision discusses Google's Play Store as a distribution channel relevant to games.
    - Company verification: The decision identifies Amazon Luna among major cloud-gaming platforms.
    - Company verification: The decision identifies NVIDIA GeForce NOW among major cloud-gaming platforms.

67. Publishing - HyperBeard
    - Company verification: HyperBeard offers mobile-game publishing services and identifies Adorable Home, Tsuki titles, and Pocket Love in its publishing portfolio.
    - Company verification: The page identifies the business as HyperBeard, Inc.
    - Company verification: HyperBeard identifies Cometa Games as a developer partner associated with My Dear Farm and Cozy Forest.
    - Company verification: The page does not establish Cometa Games' legal entity or country of operation.
68. Lienzo
    - Company verification: Lienzo's press kit identifies a game-development studio in Chihuahua, Mexico.
    - Company verification: The listed portfolio includes Mulaka, Aztech, and Hunter's Legacy.
    - Company verification: Lienzo's press kit identifies its Chihuahua, Mexico studio and lists Mulaka, Aztech, and Hunter's Legacy releases.
69. Bromio
    - Company verification: Bromio identifies itself as an independent Mexican game studio based in Puebla.
    - Company verification: Its press material connects the studio with Pato Box development.
70. Ogre Pixel
    - Company verification: Ogre Pixel identifies itself as an independent video-game development studio in Aguascalientes, Mexico.
71. 1 Simple Game - Presskit
    - Company verification: The company press kit identifies xx.xx Simple Game in Zapopan, Mexico.
    - Company verification: It describes released games including Mucho Taco and The Lullaby of Life, including the latter's Apple Arcade release.
72. ABOUT NAVEGANTE
    - Company verification: The company presentation hosted by JETRO describes Navegante as an independent developer based in Mexico.
    - Company verification: It identifies Greak: Memories of Azur as a released PC and console game published in partnership with Team17.
73. About - Red Barrels
    - Company verification: Red Barrels identifies itself as an independent Montreal studio.
    - Company verification: It describes independently developing and publishing Outlast, Outlast: Whistleblower, Outlast xx.xx and The Outlast Trials.
    - Company verification: The page identifies Red Barrels Inc. in its corporate consent text.
74. Thunder Lotus - Thunder Lotus
    - Company verification: Thunder Lotus provides a Montreal, Quebec, Canada business address.
    - Company verification: Its press kit describes released games including Jotun, Sundered, and Spiritfarer, and records the March 2025 Early Access launch of xx.xx Immortals.
75. About | HINTERLAND
    - Company verification: Hinterland describes its independent interactive-entertainment business.
    - Company verification: The page identifies Hinterland Studio Inc. and its The Long Dark intellectual-property connection.
76. Creations | HINTERLAND
    - Company verification: Hinterland's catalog lists The Long Dark and associated offerings.
    - Company verification: The catalog separately labels Blackfrost: The Long Dark xx.xx as announced.
77. Privacy Policy | HINTERLAND
    - Company verification: The privacy policy identifies Hinterland Studio Inc. at a Vancouver, British Columbia, Canada address.

78. Sea of Stars - FAQ
    - Company verification: Sea of Stars' official FAQ connects its development team with Sabotage Studio in Quebec City, Canada.
    - Company verification: The FAQ identifies commercial PC, console, and mobile availability and distinguishes released updates from future development.
79. Company - Hyper Hippo Games
    - Company verification: Hyper Hippo describes development and publishing activity involving AdVenture Capitalist, AdVenture Communist, and other games.
    - Company verification: It describes establishing its own publishing operation.
80. Terms of Use - Hyper Hippo Games
    - Company verification: The terms identify Hyper Hippo Entertainment Ltd. as a gaming company headquartered in Kelowna, British Columbia.
    - Company verification: The terms cover its web and mobile games and associated services.
81. Relic Entertainment | Game with us.
    - Company verification: Relic's business description identifies game-development work on Company of Heroes, Age of Empires IV, and other strategy games.
    - Company verification: The description presents Relic as newly independent; it does not by itself establish the current controlling shareholder.
82. Press Kits - Studio MDHR
    - Company verification: Studio MDHR describes itself as an independent developer founded in Canada.
    - Company verification: Its press material identifies Cuphead and The Delicious Last Course as released commercial games.
83. Supergiant Games
    - Company verification: Supergiant identifies itself as an independent game studio based in San Francisco.
    - Company verification: Its team description establishes original-game development and publishing activity.
84. Press Kit | Innersloth - Creators of Among Us and The Henry Stickmin Collection!
    - Company verification: Innersloth's official press kit provides a Redmond, Washington business contact address.
    - Company verification: It identifies Among Us and other Innersloth game properties.
85. About - Annapurna Interactive
    - Company verification: Annapurna Interactive identifies itself as a division of Annapurna Pictures.
    - Company verification: The division describes releasing games including What Remains of Edith Finch, Outer Wilds, Neon White, and Stray.
86. About us
    - Company verification: Devolver's corporate description establishes indie and premium-AA video-game publishing.
    - Company verification: The page identifies Devolver Digital Inc.; unsupported leadership and ranking statements were not used.
    - Company verification: The corporate page describes indie and premium-AA video-game publishing under Devolver Digital.
    - Company verification: The same page identifies Devolver Digital Inc. in its corporate footer, supporting an apparent overlap with the separately staged Devolver Digital row.
    - Company verification: The Devolver Digital corporate page describes game publishing and identifies Devolver Digital Inc. in its footer.
    - Company verification: The record supports an apparent overlap with the separately staged Devolver Digital Inc. identity rather than a newly established independent participant.

87. All of The Games on Netflix Right Now - Netflix Tudum
    - Company verification: Netflix maintains an official Netflix Games catalog, establishing a publicly presented gaming offering.
    - Company verification: The catalog alone does not establish the legal operating entity or availability in every assigned country.
88. Privacy Policy | MobilityWare
    - Company verification: The policy, updated September xx.xx 2025, identifies MobilityWare, LLC as a mobile-game developer and publisher.
    - Company verification: It provides an Irvine, California address.
89. View All games from Mobilityware
    - Company verification: MobilityWare's catalog lists Solitaire, FreeCell Solitaire, Spider Solitaire, Monopoly Solitaire, and other casual games.
90. Tilting Point: Raise Your Game
    - Company verification: Tilting Point describes mobile-game development and publishing, including SpongeBob: Krusty Cook-Off, Star Trek Timelines, and Avatar: Realms Collide.
    - Company verification: Its office list includes Miami, New York, and Montreal.
    - Company verification: The page identifies AN Games and Joy Factory Games within its studio presentation.
91. About - Cloud Imperium Games
    - Company verification: Cloud Imperium describes its founding in Austin, Texas and its game-development business.
    - Company verification: It identifies Star Citizen and Squadron xx.xx as development projects; the page does not establish completed release status.
92. Full Service Game Development Studio for Hire - Schell Games
    - Company verification: Schell Games publicly presents a commercial full-service game-development offering.
93. Schell Games Portfolio | Our Games & Client Projects - Schell Games
    - Company verification: Schell Games maintains a portfolio covering its own games and client projects.
94. All Games App | playSTUDIOS
    - Company verification: PLAYSTUDIOS' catalog lists Tetris-branded games, myVEGAS Slots, myVEGAS Bingo, MGM Slots Live, and POP! Slots.
    - Company verification: The corporate navigation identifies a Las Vegas studio; the catalog does not establish title-level licensing terms or monetization classification.
95. Stardew Valley - Press
    - Company verification: Stardew Valley's official press material identifies ConcernedApe as its developer and publisher.
    - Company verification: The material describes ConcernedApe as the creator's alias and lists PC, console, and mobile platforms; it does not resolve the legal company identity.
96. A remote indie game studio developing design-focused games. - Mega Crit Games
    - Company verification: Mega Crit Games' official About page presents the business as a remote independent game studio.
    - Company verification: The inspected material did not establish a North American address or exact legal company name.
97. About | Uplift Games
    - Company verification: Uplift Games describes a remote studio operating across North America and the United Kingdom.
    - Company verification: It identifies itself as the team operating Adopt Me! on Roblox.
98. About | Polyarc
    - Company verification: Polyarc's About page connects the studio with Seattle and the Moss game series.
    - Company verification: The page alone does not establish continued staffing or present operating status.

99. News | Polyarc
    - Company verification: Polyarc's official news index records the July xx.xx 2026 release of Moss: The Forgotten Relic on PC and consoles.
    - Company verification: It also lists a September xx.xx 2026 company/community update, whose implications for ongoing corporate operations were not resolved.
    - Company verification: The page identifies Polyarc, Inc.
100. Bermuda Island Games - Learn. Create. Play.
    - Company verification: Bermuda Island Games describes its Bermudian game-development business and the mobile launch of Hidden Gems of Bermuda by January 2017.
    - Company verification: It states that its emphasis subsequently shifted toward educational courses, game-design events, and camps.
101. Inuaverse ApS | LinkedIn
    - Company verification: Inuaverse ApS' public company profile describes a Greenland game-studio initiative.
    - Company verification: Its company-authored update identifies Project Qaamaneq as a project in development, not a released commercial game.
102. Who We Are | Wildlife
    - Company verification: The company states that Wildlife Studios was founded in Brazil.
    - Company verification: Its company history identifies launched mobile games including Tennis Clash, Zooba, Sniper 3D, and War Machines.
103. Nuuvem | Nossa lore
    - Company verification: Nuuvem describes its Brazilian founding and the launch of its digital game store in 2011.
    - Company verification: The page identifies Nuuvem as responsible for offers and transactions conducted through its service.
104. Brazil Games - Gamescom 2024 company catalog
    - Company verification: QUByte's company entry describes publishing and porting services across console, PC, and mobile platforms.
    - Company verification: The entry identifies MARS 2120 in its game portfolio.
    - Company verification: Mad Mimic's company entry identifies it as a game developer from São Paulo, Brazil.
    - Company verification: The entry describes game-development, art, co-development, and porting services.
105. Fanatee | About us
    - Company verification: Fanatee describes itself as a game-development studio with Brazilian roots.
    - Company verification: Its company page identifies its São Paulo office and Miami hub.
106. Fanatee | Home
    - Company verification: Fanatee's official portfolio presents its consumer word and puzzle games, including CodyCross.
107. Quem Somos - AFTERVERSE
    - Company verification: Afterverse identifies itself as the game studio behind PK XD.
    - Company verification: The company states that it originated within Movile and became independent of that group in 2024.
108. Home - TappsGames
    - Company verification: Tapps Games describes its development and publishing business and states that it has operated since 2010.
    - Company verification: Its official portfolio offers named mobile games including Vlogger Go Viral and My Boo.
109. About | Rogue Snail
    - Company verification: Rogue Snail describes itself as a fully remote game studio with team members across Brazil.
110. Rogue Snail
    - Company verification: Rogue Snail's official game portfolio identifies its Relic Hunters business.

111. Mad Mimic
    - Company verification: Mad Mimic's official game portfolio identifies titles including Dandy Ace and Mark of the Deep.
112. ARVORE - Home
    - Company verification: The site identifies ARVORE Immersive Games Inc. and a team presence that includes Brazil.
    - Company verification: Its immersive-game portfolio includes Pixel Ripped 1995 and YUKI.
113. Dumativa - We make videogames
    - Company verification: Dumativa describes itself as a Brazilian game studio.
    - Company verification: Its portfolio presents Enigma of Fear with a purchase link and lists Songs for a Hero and Shieldmaiden.
114. Desenvolvedora de jogos | Pulsatrix Studios
    - Company verification: Pulsatrix Studios' official portfolio connects the studio to named horror-game offerings, including Fobia.
115. OV Entertainment Group acquires co-development studio Kokku and tech firm 3OGS
    - Company verification: The August xx.xx 2024 announcement states that OV Entertainment Group completed acquisitions of Kokku and Argentina-based 3OGS.
    - Company verification: It describes Kokku's Brazilian game co-development business and 3OGS's game-engineering services.
116. Reconfiguración de las cadenas de valor: Impactos, oportunidades, amenazas y estrategias para América Latina y el Caribe en el sector de videojuegos
    - Company verification: The September 2025 publication identifies Etermax's Argentine game-development and publishing business, including Apalabrados, Preguntados, and Trivia Crack World.
    - Company verification: Its company discussion identifies regional offices beyond Argentina, including Uruguay, Brazil, and Colombia.
    - Company verification: The publication identifies Bamtang Games as a Peruvian video-game participant.
117. Dedalord - Game Studio
    - Company verification: Dedalord describes its development and self-publishing business, with a focus on midcore mobile games.
    - Company verification: The company states that its collaborators are located across Argentina.
118. Tlön Industries - Storytellers of our worlds
    - Company verification: Tlön Industries' official site describes developing its own games and publishing games from other developers.
    - Company verification: The portfolio identifies Per Aspera.
119. Game Design and Development | Games Studio
    - Company verification: Globant's Games Studio offers game development, art, and online services.
    - Company verification: Its project portfolio identifies work associated with Hogwarts Legacy, Fortnite, and FIFA xx.xx.
120. UI Game Developer - Globant
    - Company verification: Globant's official UI Game Developer posting identifies Argentina as the location for a game-development role.
121. Games - saber.games
    - Company verification: Saber's official website presents a commercial video-game catalog under the Saber brand.
122. Home - Ironhide Game Studio
    - Company verification: Ironhide Game Studio identifies itself as an indie game developer from Uruguay.
123. Games - Ironhide Game Studio
    - Company verification: Ironhide's official game catalog presents the Kingdom Rush portfolio.

124. Sector videojuegos en Uruguay - Febrero 2026
   - Company verification: Uruguay XXI's February 2026 publication connects Ironhide to Uruguay and the Kingdom Rush series.
   - Company verification: The publication identifies Pomelo Games and its Outlanders and Outlanders xx.xx businesses.
   - Company verification: The publication identifies Batovi Games Studio's Pixel Cup Soccer and Charrúa Soccer offerings and its distribution relationship with Apple's platforms.
125. About us - Pomelo Games
   - Company verification: Pomelo Games identifies its offices in Montevideo, Uruguay.
   - Company verification: Its company history identifies released titles including Bullet Boy, Mars: Mars, and Outlanders.
126. ACE Team - About Us
   - Company verification: ACE Team describes itself as an independent game-development studio located in Santiago, Chile.
127. ACE Team - Games
   - Company verification: ACE Team's official games page presents its named video-game portfolio.
128. ProChile - GDC company catalog
   - Company verification: ProChile's company catalog identifies IguanaBee as a Chilean game-development studio.
   - Company verification: Its entry names development work including What Lies in the Multiverse, G.I. Joe: Operation Blackout, Little League World Series Baseball 2022, and Headsnatchers.
129. ABOUT - TERAVISION
   - Company verification: Teravision Games identifies itself as a game-development studio headquartered in Bogotá, Colombia.
130. TERAVISION - Our games
   - Company verification: Teravision's official portfolio identifies Captain ToonHead vs the Punks from Outer Space and Killer Klowns from Outer Space.
   - Company verification: The site identifies Orcs Must Die: By The Blade as available for Quest xx.xx/3S.
131. Services | Dreams Uncorporated
   - Company verification: Dreams Uncorporated offers full-cycle game-development services.
   - Company verification: The service portfolio names experience with Lunar Lander Beyond and Bye Sweet Carole.
132. Dreams Uncorporated | LinkedIn
   - Company verification: Dreams Uncorporated's public company profile identifies Bucaramanga, Colombia as its headquarters.
   - Company verification: Its company updates describe Prisma as a development and showcase project rather than establish a released product.
133. LEAP Game Studios - We make games
   - Company verification: LEAP Game Studios identifies itself as an independent studio in Lima, Peru.
   - Company verification: Its catalog identifies original games and co-productions including Tunche, Arrog, and Dicefolk, with named publishing partners.
134. Bamtang Games - Making great games from scratch
   - Company verification: Bamtang's official portfolio identifies Bamtang Games as developer of Hot Wheels Let's Race: Ultimate Speed.
   - Company verification: The portfolio separately identifies GameMill Entertainment as publisher and lists console and PC platforms.
135. About us - Fair Play Labs
   - Company verification: Fair Play Labs identifies its game-development studio in San José, Costa Rica.
   - Company verification: It identifies development work on Nickelodeon All-Star Brawl and Nickelodeon All-Star Brawl xx.xx.

136. About Sunna | Sunna Entertainment
   - Company verification: Sunna Entertainment identifies itself as an indie game studio based in Costa Rica.
137. Games | Sunna Entertainment
   - Company verification: Sunna's official games page identifies Planet Cube: Edge for Steam and consoles and lists additional game projects.
138. Presskit for Selva Interactive
   - Company verification: Selva Interactive's official press kit identifies its Guatemala City studio and founders.
   - Company verification: It lists Illuminaria, Nanuleu, and Highwind as releases.
139. SpriteWrench
   - Company verification: Spritewrench identifies itself as a one-person game studio based in Kingston, Jamaica.
140. spritewrench - itch.io
   - Company verification: The developer-controlled Spritewrench storefront presents games under the same studio identity.
141. Saviorless - Presskit
   - Company verification: The official Saviorless press kit identifies Empty Head Games and the project's origins in Havana, Cuba.
   - Company verification: The material describes the game's international commercial release and distribution.
142. Puerto Rico Film Commission - Film Industry Contacts, April 2025
   - Company verification: The April 2025 Puerto Rico Film Commission directory lists SRG Studios / Space Rhino Games under video-game studios.
   - Company verification: The April 2025 government directory lists LED Development Studios LLC. under video-game studios in Puerto Rico.
   - Company verification: The April 2025 government directory lists Render Room under video-game studios in Puerto Rico.
143. Waraní Studios | LinkedIn
   - Company verification: Waraní Studios' public company profile identifies its Paraguayan game-development business.
   - Company verification: Its company announcement identifies development work on BrokenLore: UNFOLLOW for Serafini Productions and Shochiku Games.
144. To Leave, videojuego ecuatoriano de calidad mundial
   - Company verification: The Ecuadorian arts agency's May xx.xx 2018 article identifies Freaky Creations as the company created by To Leave's developers.
   - Company verification: The article connects the developers and game to Guayaquil, Ecuador and PlayStation distribution.
145. Divisions
   - Company verification: Identifies everplay plc's astragon, StoryToys, and Team17 divisions.
   - Company verification: Describes game publishing and licensed mobile-game activities and names franchises including Worms and Overcooked.
146. Our games - PulluP Entertainment
   - Company verification: States that PULLUP Entertainment develops and publishes AA and independent games through its subsidiaries.
147. The Integrated Pure-play in Video Gaming | NACON
   - Company verification: Identifies NACON as Bigben's consolidated gaming business.
   - Company verification: Describes video-game development and publishing, gaming accessories, and European studio locations.
148. Publishing - Digital Bros
   - Company verification: Establishes Digital Bros' multiplatform publishing business through xx.xx Games.
   - Company verification: Names published games including Assetto Corsa, Bloodstained, Ghostrunner, and Gems of War.

149. About - IO Interactive
    - Company verification: Describes IO Interactive's development and publishing of the HITMAN series and its independence from Square Enix in 2017.
    - Company verification: Lists Copenhagen, Malmö, Barcelona, and Brighton studio locations.
150. Privacy Policy - facepunch
    - Company verification: Identifies Facepunch Studios Ltd as an England-registered company with a Birmingham address.
    - Company verification: Connects the company to Garry's Mod, Rust, and other games; distinguishes the console Rust publisher.
151. About | Bohemia Interactive
    - Company verification: Identifies Bohemia Interactive as an independent video-game developer and publisher.
    - Company verification: Connects the Arma portfolio to operations in Czechia and the Netherlands.
152. Press | SCS Software
    - Company verification: Identifies SCS Software as a Prague-based developer.
    - Company verification: Names Euro Truck Simulator xx.xx and American Truck Simulator in its commercial portfolio.
153. Who we are - 11bits Investor Relations
    - Company verification: Identifies Warsaw-based xx.xx bit studios S.A. as a multiplatform game developer and publisher.
    - Company verification: Names This War of Mine, Frostpunk, and third-party publishing activities.
154. About us | Remedy
    - Company verification: Identifies Remedy Entertainment Plc, headquartered in Espoo with a Stockholm office.
    - Company verification: Connects the company to CONTROL and Alan Wake and describes its PC and console business.
155. About Us - Hello Games
    - Company verification: Describes Hello Games as an independent developer and publisher based in Guildford and Cambridge.
    - Company verification: Identifies No Man's Sky, Joe Danger, and The Last Campfire.
156. CVC Capital Partners and Haveli Investments agree to acquire Jagex | Jagex
    - Company verification: The February xx.xx 2024 announcement identifies Cambridge-headquartered Jagex and its RuneScape and Old School RuneScape businesses.
    - Company verification: Announces an agreement for acquisition by CVC funds and Haveli Investments, rather than independently establishing completion.
157. Frontier Developments plc Annual report and accounts 2025
    - Company verification: The 2025 annual report establishes Frontier Developments plc's game-development and publishing business.
    - Company verification: Documents its portfolio, including Planet Zoo and the Planet Coaster and Jurassic World Evolution franchises.
158. About Gameforge
    - Company verification: Identifies Gameforge AG and its Karlsruhe business base.
    - Company verification: Describes online-game development, publishing, and live operations and identifies OGame.
159. Travian Games - Together in Games | Browser & Mobile Strategy Games
    - Company verification: Connects Travian Games' Munich operation to Travian: Legends and Travian Kingdoms.
    - Company verification: Describes Bright Future's Cologne operation and Rail Nation within the same business.
160. CipSoft - 20 Years of CipSoft
    - Company verification: The June xx.xx 2021 company announcement identifies Regensburg-based CipSoft GmbH and its Tibia business.

161. Jobs available at video game developer Crytek
    - Company verification: Identifies Frankfurt as Crytek's headquarters and the home of its Hunt and CRYENGINE teams.
    - Company verification: Names Hunt: Showdown xx.xx as an active project associated with commercial and publishing roles.
162. Company | Kalypso Media
    - Company verification: Describes Kalypso Media Group as privately owned and as an independent developer and publisher.
    - Company verification: Names European operations and games including Tropico, Railway Empire, and Dungeons.
163. Unternehmen | Kalypso Media
    - Company verification: Identifies Kalypso Media Group GmbH in Worms and names associated UK and development businesses.
    - Company verification: Connects the group to named strategy-game franchises.
164. GIANTS Software | Imprint
    - Company verification: Identifies GIANTS Software GmbH at a Swiss address.
    - Company verification: Identifies Farming Simulator as a trademark or registered trademark of that entity.
165. Poki - Let the world play
    - Company verification: Identifies Poki B.V. and an Amsterdam business address.
    - Company verification: Describes its free online-game platform and commercial relationships with game developers and advertisers.
166. CrazyGames Developer Terms - August 18, 2025
    - Company verification: The August xx.xx 2025 developer terms identify Belgian Maxflow BV as the publisher using the CrazyGames trade name.
    - Company verification: Establishes a browser-game distribution relationship with developers.
167. About - GDEV
    - Company verification: Describes GDEV as a gaming-studio group headquartered in Limassol, Cyprus.
    - Company verification: Identifies Nexters as its founding studio and connects it to Hero Wars.
168. MY.GAMES | About
    - Company verification: Identifies MY.GAMES as an Amsterdam-based gaming company.
    - Company verification: Describes Knights Peak as its PC and console publishing division.
169. Леста Игры - ведущий разработчик игр в СНГ
    - Company verification: The Russian-language business page presents Mir Tankov and identifies offices in Saint Petersburg and Moscow.
170. Wargaming announces decision to leave Russia and Belarus
    - Company verification: Wargaming's April 2022 announcement identifies Lesta Games and states that transferred Russia/Belarus operations were no longer affiliated with Wargaming.
    - Company verification: Records Wargaming's decision to leave Russia and Belarus and transfer its local business to Lesta Games.
171. About Us | Gameloft
    - Company verification: Describes Gameloft's mobile, PC, and console game activities.
    - Company verification: Identifies Asphalt and its 2025 release of Carmen Sandiego.
    - Company verification: Gameloft's official company page describes mobile, PC, and console game activities and identifies named commercial games.
    - Company verification: This supports continuing branded game-business participation without establishing a separate economic entity for the Gameloft trade name.
    - Company verification: The official page connects the Gameloft name to multiplatform game development and publishing; the separate Gameloft S.E. legal identity remains represented by its protected row.

172. Legal Notice | Gameloft Business Solutions
    - Company verification: Identifies Gameloft S.E., its Paris business address, and registration.
    - Company verification: Describes commercial game packages, subscriptions, and carrier distribution relationships.
    - Company verification: The legal notice identifies Gameloft S.E., its Paris address, and registration number.
    - Company verification: It describes game catalogs, subscription packages, carrier billing, and distribution relationships.
    - Company verification: The Gameloft-branded legal notice identifies Gameloft S.E. as the registered Paris business behind its commercial game services.
    - Company verification: The notice describes game catalogs, subscription packages, carrier billing, and distribution relationships, confirming the economic overlap with the retained Gameloft row.
    - Company verification: The Gameloft-branded business notice identifies Gameloft S.E. as the company behind the service.
    - Company verification: This creates an apparent reporting overlap with the separately staged Gameloft S.E. identity.
    - Company verification: The legal notice identifies Gameloft S.E. as the company behind the Gameloft-branded business, rather than establishing an independent second participant.
173. About Microids | Microids
    - Company verification: Describes Microids' creation and distribution of PC, console, and smartphone games.
    - Company verification: Connects the French business to franchises including Syberia and licensed entertainment properties.
174. Tactile Games - Danish game developer located in the heart of Copenhagen
    - Company verification: Identifies Tactile Games and offices in Copenhagen, Derby, and Tenerife.
    - Company verification: Names Lily's Garden, Cookie Cats, and Simon's Cat games.
175. Homa | Privacy
    - Company verification: Identifies HOMA GAMES SAS as a France-registered business headquartered in Paris.
    - Company verification: Describes relationships with players and game developers.
176. Homa | Games
    - Company verification: Lists Homa's commercial game portfolio, including All In Hole, Sky Roller, and Aquarium Land.
177. Azerion Group N.V. - Interim Unaudited Financial Results Q1 2026
    - Company verification: The first-quarter 2026 report identifies Azerion Group N.V. and its gaming-related business perimeter.
    - Company verification: Classifies the remaining Premium Games businesses, including Habbo Hotel and Hotel Hideaway, within discontinued operations; it does not establish their subsequent disposal status.
178. CD PROJEKT co-founder Michał Kiciński acquires GOG from CD PROJEKT - GOG Pressroom
    - Company verification: Identifies GOG sp. z o.o. and its digital game-distribution business.
    - Company verification: Announces Michał Kiciński's acquisition of all shares and continued independent operations.
179. The CD PROJEKT Groups wraps up 2025
    - Company verification: The 2025 business review confirms that the disposal of all GOG shares was finalized December xx.xx 2025.
    - Company verification: Establishes ongoing Witcher and Cyberpunk game activities.
    - Company verification: Confirms the completed disposal of GOG and the group's focus on game development.

180. Current report no. 12/2026 - CD PROJEKT RED
   - Company verification: The regulatory notice records the August xx.xx 2026 registration of the name CD PROJEKT RED S.A.
   - Company verification: Explicitly states that only the name changed and the legal entity and registration details remain unchanged.
   - Company verification: The August xx.xx 2026 regulatory announcement records the change from CD PROJEKT S.A. to CD PROJEKT RED S.A.
   - Company verification: The announcement expressly states that the legal entity and its other registration details remain unchanged, confirming a protected display-title conflict rather than a new company.
181. Management Board Report on Activities of Ten Square Games S.A. and Group for 2025
   - Company verification: The 2025 management report establishes Ten Square Games S.A. and its group.
   - Company verification: Describes the commercial importance and ongoing operation of Fishing Clash and Hunting Clash.
182. Woka Woka - Marble Shooter Game
   - Company verification: Identifies Two Desperados as a Belgrade-based game-development studio.
   - Company verification: Identifies Woka Woka as its game.
183. Bloober Team - About Us
   - Company verification: Describes Bloober Team as a game-development studio.
   - Company verification: Lists Blair Witch, Layers of Fear, Observer: System Redux, and The Medium; its forward-looking Silent Hill description is not treated as current release evidence.
184. Home | G5 Games
   - Company verification: Describes G5 Entertainment's development and publishing of free-to-play mobile and PC games.
   - Company verification: Identifies G5 Store and third-party distribution channels and references the Swedish listed entity.
185. About SayGames
   - Company verification: Describes SayGames' publishing relationships with developer partners and commercial game-promotion activities.
186. About us - Room 8 Group
   - Company verification: Describes Room xx.xx Group's commercial game co-development services.
   - Company verification: Names contributed projects including Alan Wake xx.xx The Crew Motorfest, and Life Is Strange: True Colors.
187. How we drive monetization through gaming | MTG
   - Company verification: Describes MTG as a mobile-first gaming group.
   - Company verification: Names franchises including RAID: Shadow Legends, Forge of Empires, Top Drives, and Bloons and identifies associated studios.
188. Plarium - MTG
   - Company verification: States that MTG's Plarium acquisition closed February xx.xx 2025.
   - Company verification: Identifies Plarium's games and European operating footprint within MTG.
189. This is Stillfront - Stillfront Group
   - Company verification: Describes Stillfront's digital-game business.
   - Company verification: Documents historical studio additions and game connections, including Bytro and Supremacy 1914.
190. Careers - Larian Studios
   - Company verification: Connects Larian Studios to Divinity and Baldur's Gate xx.xx.
   - Company verification: Lists studios including Gent, Barcelona, Dublin, Guildford, and Warsaw.

191. Privacy Policy | Tripledot Games
    - Company verification: The notice dated September xx.xx 2026 identifies Tripledot Studios Limited at a London registered address.
    - Company verification: Describes development and publishing of mobile games but does not establish named games or completed acquisitions.
192. Tamatem Games | About us - Tamatem Games
    - Company verification: Tamatem describes Arabic-language mobile-game localization and publishing.
    - Company verification: Its business history identifies launches including VIP Baloot and Battle of Kings.
193. Tamatem Games | Contact Us - Tamatem Games
    - Company verification: The company lists an office at King Hussein Business Park in Amman, Jordan.
194. Top Mobile Games in the Middle East | Maysalward
    - Company verification: Maysalward identifies itself as a Middle Eastern mobile-game studio.
    - Company verification: Its portfolio promotes Dominoes Pro and King of Hearts.
    - Company verification: It describes Maysalward UK LTD. as its second studio, rather than an unrelated supplier.
195. Contact - Maysalward
    - Company verification: Maysalward lists headquarters contact information and support contacts in Amman, Irbid, Karak, and Aqaba.
    - Company verification: The same contact page distinguishes its UK studio address.
196. Android Apps by Mad Hook on Google Play
    - Company verification: The Mad Hook developer catalog lists mobile games including Rooftop Run, Amer: The Chase Hit and Run, and Highway Drifter: Hajwala Online.
197. Home - Spoilz
    - Company verification: Spoilz identifies itself as a Saudi game-development and publishing company serving regional and international players.
    - Company verification: Its portfolio identifies mobile titles including Airport Swap, Camel Run, and Space Tycoon.
198. Leading Game Development Company | UMX Studio
    - Company verification: UMX Studio's game portfolio names DriftX, King of Steering, Climbing Sand Dune, and Shesh Ludo.
    - Company verification: The site identifies the business as a Saudi studio.
199. About UMX Studio | UMX Studio
    - Company verification: UMX identifies its name as a shortened form of Uromastyx Studio.
    - Company verification: Its business history connects the studio to a Riyadh office and the released game Climbing Sand Dune.
200. Manga Productions | Inspiring Heroes of Tomorrow
    - Company verification: Manga Productions identifies itself as a subsidiary of the Mohammed bin Salman Misk Foundation.
    - Company verification: Its own portfolio includes the digital games Ghoul's Cave and Dhafer the Champion alongside nongaming content.
201. Strategic Partnership Between Manga Productions and SEGA to Publish ” Sonic Racing: Crossworlds” in MENA - Manga Productions
    - Company verification: A July xx.xx 2025 Riyadh announcement identifies a Manga Productions-SEGA publishing and distribution agreement for Sonic Racing: CrossWorlds in MENA.
    - Company verification: The announcement establishes an agreement and regional commercial role, not country-level sales.
202. Our games - Sandsoft
    - Company verification: Sandsoft's official catalog identifies publishing or co-development roles for Pocket Necromancer, Wizario, Iza's Supermarket, and Business Dude.
    - Company verification: The live catalog alone does not establish continued operation after reported closure.

203. Contact us - Sandsoft
    - Company verification: Sandsoft's official contact page lists Riyadh, Saudi Arabia, as headquarters.
204. Saudi outfit Sandsoft is closing, say sources, after its owners 'pulled the plug' - Mobilegamer.biz
    - Company verification: An October xx.xx 2025 trade-news report described Sandsoft as closing, based on sources.
    - Company verification: The article stated that Sandsoft had not responded to requests for confirmation; it does not definitively establish legal dissolution.
205. About Us | Game Power 7
    - Company verification: Game Power xx.xx identifies itself as a subsidiary of Global New Age Media Group.
    - Company verification: It describes Arabic online-game publishing and localization, including Arabic Rappelz.
    - Company verification: The page lists Dubai Media City, UAE, as its business contact location.
206. Games | Game Power 7
    - Company verification: The official Game Power xx.xx catalog identifies mobile titles including Warriors' Line-Up, Sultans Mines, and Cardia.
207. Kashkool Games
    - Company verification: Kashkool Games' press materials identify an Abu Dhabi, UAE, independent game business.
    - Company verification: The materials connect the studio to Sheba: A New Dawn and identify its co-founders.
208. Steam Publisher: Kashkool Games
    - Company verification: The Kashkool Games Steam publisher page offers Sheba: A New Dawn and lists an April xx.xx 2024 release date.
209. NXT LYR | Designing the Next Layer of Digital Experience
    - Company verification: NXT LYR explicitly describes earlier business activity under the Game Cooks name.
    - Company verification: It lists a Riyadh address and a portfolio of original VR/mobile games, including AVO: Escape Space and VINDICTA.
    - Company verification: Its portfolio separately marks Boom Heads and Yalla Ride as coming soon.
210. YALA-2025-20F
    - Company verification: The FY2025 Form xx.xx-F establishes Yalla Group Limited's identity and Dubai principal executive offices.
    - Company verification: It describes operated games including Yalla Ludo and distinguishes gaming from chatting services.
    - Company verification: The filing establishes a regional operating business, not a separate participant for each country served.
211. Good Job Games → Sharp Minds, Bold Games
    - Company verification: Good Job Games describes itself as a mobile-gaming company founded in 2017.
    - Company verification: Its official portfolio links Wonder Blast and Match Villains to mobile storefronts.
212. Spyke Games
    - Company verification: Spyke Games describes a mobile-gaming business with an Istanbul office.
    - Company verification: Its portfolio names Yarn Loop and Tile Busters.
213. Grand Games
    - Company verification: Grand Games states that it is based in Istanbul.
    - Company verification: Its official game portfolio identifies Magic Sort and Car Match.
214. About Us
    - Company verification: Bigger Games identifies a mobile-gaming business operating since 2019.
    - Company verification: It names Kitchen Masters and describes an Istanbul office.

215. Hakkında - TaleWorlds Entertainment
    - Company verification: TaleWorlds' Turkish business page identifies an independent game developer founded in Ankara.
    - Company verification: Its business history records released Mount & Blade products and Bannerlord's 2020 early-access launch.
216. Games That Bite Back | Candivore
    - Company verification: Candivore identifies itself as the creator of Match Masters and describes competitive match-xx.xx gaming.
217. Official Website
    - Company verification: Medrick's English business site describes mobile and PC game development and publishing for MENA.
    - Company verification: The page lists a Dubai office and regional publishing/localization services.
    - Company verification: This disclosure does not establish the legal relationship with Iranian Medrick entities.
218. About Us - Sourena Games
    - Company verification: Sourena Games' English business description identifies game-development/publishing activity and a history beginning with Legends of Persia.
    - Company verification: Its portfolio also identifies What Happened and other game projects.
219. Home - □□□□ □□□□□
    - Company verification: Sourena's Persian-language site describes online-game production and publishing.
    - Company verification: It separates developing projects from its game portfolio and identifies What Happened as available from July 2020.
220. SFS Games Studio
    - Company verification: SFS Games identifies itself as an independent Bahraini studio founded in 2018.
    - Company verification: Its portfolio identifies Pedro the Bird as a 2020 mobile release and names browser-playable or commissioned projects.
    - Company verification: The business offers game-development and gamification services.
221. Setting Sail: A New Game Studio Launches in Bahrain - Twin Seas Interactive
    - Company verification: Twin Seas Interactive announced its Bahrain studio launch on October xx.xx 2025.
    - Company verification: The announcement offers outsourced game-development/immersive services and describes its first original indie title as being in early development.
222. Press kit | Soulbros Studios
    - Company verification: Soulbros Studios' press kit identifies an independent Bahrain-based mobile studio founded in 2026.
    - Company verification: It names Sprout and Pixel Pets as titles being developed, not demonstrated marketed releases.
223. Dawawer - Saudi Game Studio & Arabic Game Publisher
    - Company verification: Dawawer describes an Arabic-game development and publishing business.
    - Company verification: Its English page states regional presence in Bahrain and Saudi Arabia and describes game-industry enablement programs.
    - Company verification: The page does not establish a specific marketed game.
224. Reflection of Demon | Coming 2026-6-6
    - Company verification: The Reflection of Demon site identifies Lingering Effect Studio as an independent Bahrain-based game studio founded in 2026.
    - Company verification: The inspected page contains a planned availability label rather than proof that the game was released.

225. TGS2019_ビジネス英_0903-2_cc2019.indd
    - Company verification: The 2019 Tokyo Game Show business map lists The Stories Studio within the Bahrain Economic Development Board exhibitor grouping.
    - Company verification: This is historical event participation, not current commercialization evidence.
    - Company verification: The 2019 Tokyo Game Show business map lists Regnum Studio within the Bahrain Economic Development Board exhibitor grouping.
    - Company verification: This is historical identity/regional participation support only.
226. Buried Games Studio | Game Development for Kuwait & the GCC
    - Company verification: Buried Games publicly offers mobile, multiplayer, and game-development services to Kuwait and the GCC.
    - Company verification: It describes named project work including Up The Beat and Luna Fantasy.
    - Company verification: A service-area claim does not establish local incorporation or an independently corroborated contract award.
227. MezanStudios
    - Company verification: Mezan Studios' company site describes a video-game business and promotes Nightscape through game/community materials.
    - Company verification: The inspected site does not establish current sales or a completed release.
228. URK Studios - □□□□□ □□□□□ □□□□□□□ □□□ | □□□□□
    - Company verification: URK Studios' Arabic/English site describes an announced Baghdad game studio and developing Uruk project.
    - Company verification: The site dates its studio establishment announcement to June 2026.
    - Company verification: The announcement is not proof of incorporation, released-game availability, or sales.
229. Our Studio - Gilgatron
    - Company verification: Gilgatron Studio describes a Baghdad-based team engaged in game development and interactive storytelling.
    - Company verification: The business description does not establish a named marketed release.
230. FuratByte Studio | □□□□ □□□□
    - Company verification: FuratByte Studio's Arabic business page describes app and game creation from Iraq.
    - Company verification: This is business-role support, not evidence of a specific completed commercial game.
231. Kevir Entertainment - Game Development and Visual Solutions Outsourcing | Kevir Entertainment - Game Development and Outsourcing Studio
    - Company verification: Kevir Entertainment's official site presents the business as a game-development and outsourcing studio.
    - Company verification: The source does not establish the unresolved regional legal entity or current named-game availability.
232. DIRECTORY OF IT COMPANIES IN LEBANON 2015
    - Company verification: The Lebanese government directory identifies Wixel Studios as a historical video/mobile-game business with GCC and MENA export activity.
    - Company verification: The 2015 publication does not establish current trading status.
    - Company verification: The Lebanese government directory identifies Gamabox as a historical mobile and games-development business.
    - Company verification: The 2015 publication does not establish current ownership, offerings, or continued operation.
233. chickmania
    - Company verification: Chickmania's business page describes a studio developing mobile games for iOS and Android.
    - Company verification: It does not establish the unresolved named portfolio, legal entity, or regional operating location.

234. Moon Active
    - Company verification: Moon Active's official site identifies Moon Active Ltd. and describes a mobile-game business.
    - Company verification: The inspected page does not supply readable title-level portfolio or ownership evidence.
235. Play the most popular card games in the Arab world on Jawaker.
    - Company verification: Jawaker's official business description states that it was acquired by Stillfront Group in 2021.
    - Company verification: It describes in-house digital card/social-game development and publishing from Abu Dhabi.
    - Company verification: This supports a regional subsidiary connection without creating a separate Jawaker candidate.
236. Leading Mobile Games Publisher in Africa | Publishing | Carry1st
    - Company verification: Carry1st offers game-publishing and related market-entry services for African audiences. ([carry1st.com](https://carry1st.com/publishing))
237. About | Free Lives
    - Company verification: Free Lives' About page identifies its team, Cape Town connection, and named game portfolio, including Broforce, GORN, and Terra Nil. ([freelives.net](https://freelives.net/about/))
238. About - Nyamakop
    - Company verification: Nyamakop identifies itself as an independent PC and console game studio in Johannesburg, South Africa, and names Semblance. ([nyamakop.co.za](https://nyamakop.co.za/about/))
239. Press - Clockwork Acorn
    - Company verification: Clockwork Acorn's press kit identifies a South African studio headquartered in Cape Town, named releases, game-development services, and its Terra Nil collaboration with Free Lives. ([clockworkacorn.com](https://clockworkacorn.com/press/))
240. About Sea Monster | Global Leader in Impact Games
    - Company verification: Sea Monster describes its impact-game business and founding participation in the Pan Africa Gaming Group. This does not establish ownership of other network studios. ([seamonster.digital](https://www.seamonster.digital/about))
241. THE BROTHERHOOD GAMES
    - Company verification: The Brotherhood's official portfolio presents game projects and an Animal Use Protocol preview dated April xx.xx 2026; forthcoming content is distinguished from released products. ([thebrotherhoodgames.com](https://www.thebrotherhoodgames.com/))
242. Games -- RuneStorm
    - Company verification: RuneStorm's game catalogue names Rooks Keep and Viscera Cleanup Detail. ([runestorm.com](https://www.runestorm.com/games))
243. Desktop Dungeons
    - Company verification: The Desktop Dungeons press kit identifies QCF Design's development role and a Cape Town, South Africa, business connection. ([desktopdungeons.net](https://desktopdungeons.net/press/))
244. About - Maliyo Games
    - Company verification: Maliyo Games identifies Lagos, Nigeria, as its headquarters and describes creating and distributing mobile games. ([maliyo.com](https://www.maliyo.com/about/))
245. Maliyo Games Wins Big at the FNB App of the Year Awards 2024! - Maliyo Games
    - Company verification: Maliyo's 2024 announcement identifies Disney Iwájú: Rising Chef and Secret Letter and describes its collaboration with Disney Games on Rising Chef. ([maliyo.com](https://www.maliyo.com/maliyo-games-wins-big-at-the-fnb-app-of-the-year-awards-2024/))
246. Kucheza Gaming
    - Company verification: Kucheza presents an Africa-based game studio, original-game projects including The Wild Kingdoms and Danfo Dash, and game-art co-development services. ([kuchezagaming.com](https://www.kuchezagaming.com/))

247. Hammer Games | Pioneering Distribution of African Games
   · Company verification: Hammer Games describes a Nigerian game-distribution business, lists Warlordes for mobile, and labels Edge of Infinity as forthcoming. (hammergames.com)
248. Gamsole - Free Online Gaming Experience | Play Arcade Games
   · Company verification: The retrieved Gamsole-branded site offers browser games including House Painter and Jewel Treasure; it does not establish the operator's continuity with the Nigerian studio. ([gamsole.com](https://gamsole.com/index.html))
249. About Us | Usiku Games
   · Company verification: Usiku Games identifies its Nairobi, Kenya, base and game-development business, alongside other digital services. ([usiku.games](https://usiku.games/about))
250. Our Games | Usiku Games
   · Company verification: Usiku's portfolio names Electric Blue: Gecko Dash and impact-game projects and explicitly labels Usiku Beats as a prototype. ([usiku.games](https://usiku.games/games))
251. USONI
   · Company verification: Jiwe's official site presents Usoni as a named game project associated with the studio. ([jiwe.studio](https://jiwe.studio/stories/usoni/))
252. Mekan Games - Mobile Game Development Studio Excellence | Mekan Games
   · Company verification: Mekan Games identifies a Nairobi, Kenya, mobile-game studio and promotes The President as a downloadable game. (mekangames.com)
253. Qene Games
   · Company verification: Qene Games identifies an Ethiopian game-development business and names Kukulu and Gebeta as its mobile games. (qenetech.com)
254. PAGG - Unlocking the worlds' next 1 billion players
   · Company verification: PAGG's studio directory names Dope Apps under Rwanda; it does not establish current products or corporate ownership. ([pagg.group](https://pagg.group/studios.html))
255. Vakeeg Games | Browser-First Game Studio in Tanzania
   · Company verification: Vakeeg Games identifies itself as Vakeeg Studio's games label in Dar es Salaam, Tanzania, and presents Maasai Runner and Neon Drift as playable browser games. (games.vakeegstudio.com)
256. Kiota Games | Independent Game Studio
   · Company verification: Kiota Games identifies a Tanzanian independent mobile-game studio and lists published games including Galaxy Fury, Last Card, and WordZania. (kiotagames.com)
257. Seede XR - Immersive, VR/AR/XR & Game Studio in Tanzania
   · Company verification: Seede XR identifies a Dar es Salaam immersive-game business and lists Paintball-xx.xx as a completed VR-game project dated March xx.xx 2025. (seedexr.com)
258. About Instinct Games - Instinct Games
   · Company verification: Instinct Games' About page identifies its Egyptian game-development business and founding team. ([instinctgames.com](https://www.instinctgames.com/about/))
259. Ark Survival Evolved - Instinct Games
   · Company verification: Instinct Games includes ARK: Survival Evolved in its official game portfolio; the page is not evidence that Instinct owns the franchise. ([instinctgames.com](https://www.instinctgames.com/g/ark-survival-evolved/))
260. Gimzat | MENA | □□□□ □□□□□ □□□□□
   · Company verification: Gimzat's Arabic-language catalogue presents named games including □□□□□ □□□□□□ and □□□□□□□ □□□□□□. ([gimzat.com](https://www.gimzat.com/))
261. Rumbling Games Studio
   · Company verification: Rumbling Games Studio presents Knights of Light as its game project and describes participation in Egypt's game-development community; current commercial availability is not established. ([rumbling-games.com](https://www.rumbling-games.com/en/))

262. About us - DigitalMania Studio

· Company verification: DigitalMania's About page describes a Tunisian game-development business serving mobile and other platforms, but its discussion of 2015 plans makes currentness uncertain. ([digitalmaniastudio.com](https://www.digitalmaniastudio.com/about-us/))

263. Catalogue des startups tech tunisiennes - APII / CIDT, September 2022

· Company verification: Tunisia's September 2022 government technology-startup catalogue identifies Galactech, a Tunisian address, and services supplying content to mobile operators. ([tunisieindustrie.nat.tn](https://www.tunisieindustrie.nat.tn/fr/download/STARTUPSTECH.pdf))

264. PEACEapp Tunis | UNAOC

· Company verification: UNAOC's January-February 2018 PEACEapp Tunis record identifies Galactech as a local gaming company and describes intended follow-on app development. ([unaoc.org](https://www.unaoc.org/event/peaceapp-tunis/))

265. Kiro'o World

· Company verification: Kiro'o World's catalogue identifies Kiro'o Games Studio in Yaoundé, Cameroon, and presents Aurion: Legacy of the Kori-Odan and named mobile games. (kirooworld.com)

266. About Us - Leti Arts

· Company verification: Leti Arts describes its game-development business and provides a Ghana headquarters contact location. ([letiarts.com](https://www.letiarts.com/about-us/))

267. Android Apps by Leti Arts on Google Play

· Company verification: Leti Arts' Google Play developer page lists Sweave, Puzzle Scout, and Africa's Legends. ([play.google.com](https://play.google.com/store/apps/developer?hl=en&id=Leti+Arts))

268. Kayfo Game Studio - African mobile games

· Company verification: Kayfo's catalogue identifies a Dakar, Senegal, game studio and presents mobile games including Detective Syra, Clean my Beach, and Afro Juggle. ([kayfo.sn](https://www.kayfo.sn/))

269. Kayfo Play - Apps on Google Play

· Company verification: Kayfo Play's Google Play listing identifies Kayfo Games, names KAYFO SAS at a Senegal address, and records an update on September xx.xx 2025. ([play.google.com](https://play.google.com/store/apps/details?id=games.kayfo.play))

270. Paradise Game - Africa's Gaming & Entertainment Platform

· Company verification: Paradise Game presents gaming spaces, events, training, and community services and gives an Abidjan, Côte d'Ivoire, location. (paradisegame.net)

271. Oloroun - Mentions légales

· Company verification: Oloroun's legal notice, updated June xx.xx 2026, identifies Gara as the operating brand for the digital-game distribution product and states that Oloroun is not a distinct legal entity. ([oloroun.com](https://www.oloroun.com/fr/legal-notice))

272. □□□□□□ □□ □□□□□□□□□□ □□□□□□ □□□□□□ □□□□□□□ □□□□□□

· Company verification: Listed Moroccan pavilion studio; Rogue Fantasy showcased. ([moroccogamingindustry.ma](https://www.moroccogamingindustry.ma/ar/%D8%A7%D9%xx.xx%D8%B1%D8%A6%D9%8A%D8%B3%D9%8A%D8%A9/))

· Company verification: Listed Moroccan Gamescom 2026 pavilion startup. ([moroccogamingindustry.ma](https://www.moroccogamingindustry.ma/ar/%D8%A7%D9%xx.xx%D8%B1%D8%A6%D9%8A%D8%B3%D9%8A%D8%A9/))

273. Gameloft partners with MTN to create a unique subscription platform
   - Company verification: Gameloft announced the South African launch of the MTN Arcade mobile-game subscription platform on June xx.xx 2020. ([gameloft.com](https://www.gameloft.com/newsroom/gameloft-partners-with-mtn-to-create-a-unique-subscription-xx.xx))
   - Company verification: The June xx.xx 2020 announcement documents a historical MTN-branded game-subscription offering in South Africa, not the present consolidated legal perimeter. ([gameloft.com](https://www.gameloft.com/newsroom/gameloft-partners-with-mtn-to-create-a-unique-subscription-xx.xx))
274. MTN Gameworld | MTN Play
   - Company verification: MTN's South African product page offers Gameworld subscriptions and identifies MTN Proprietary Limited locally; the page alone does not establish consolidated-parent attribution. ([play.mtn.co.za](https://play.mtn.co.za/get/mtn-gameworld/))
275. SuperGaming - We make games for the next billion players
   - Company verification: Identifies SuperGaming Pte Ltd as the Singapore headquarters and lists Pune studios in India.
   - Company verification: Presents Indus as live in India and lists MaskGun and other game offerings.
276. Gameberry Labs | Makers of Ludo STAR & Parchisi STAR
   - Company verification: Identifies Gameberry Labs with Ludo STAR, Parchisi STAR, and other mobile-game offerings.
   - Company verification: Describes an Indian mobile-gaming studio and provides a Bellandur operating address.
277. Company Profile - Games2win
   - Company verification: The company-maintained site links Games2win to Driving Academy, Decisions, and fashion-game offerings.
278. 莉莉丝游戏
   - Company verification: Uses the Lilith Games English brand and identifies 上海莉莉丝网络科技有限公司 with a Shanghai address.
   - Company verification: Lists a game portfolio including AFK Journey and Rise of Kingdoms.
279. Company Profile - About IGG - IGG Investor Relations
   - Company verification: Describes IGG's mobile-game development and operation business and identifies Singapore headquarters.
   - Company verification: Identifies Lords Mobile and offices in China, Japan, Korea, Thailand, the Philippines, and Indonesia.
280. Smilegate Newsroom - Fact Sheet
   - Company verification: Describes Smilegate's game, platform, and IP businesses.
   - Company verification: Identifies Epic Seven as a released game with commercial presence in Korea and Japan and identifies Super Creative as a subsidiary.
281. Corporate Overview | GungHo Online Entertainment, Inc.
   - Company verification: Identifies GungHo Online Entertainment, Inc., its Tokyo address, and smartphone, console, and online-game businesses.
   - Company verification: Lists group companies including Gravity and the Asia Pacific operating company; the profile is dated June xx.xx 2026.
282. GungHo Online Entertainment, Inc. - Games
   - Company verification: The official game portfolio lists Puzzle & Dragons, Ninjala, and Ragnarok-related offerings.
283. Entertainment | Business | KOEI TECMO HOLDINGS CO., LTD.
   - Company verification: Identifies KOEI TECMO's PC, console, online, and smartphone game businesses.
   - Company verification: Describes named brands and franchises and game operations serving Japan and international markets.

284. Corporate Information | Pocketpair Inc.
   - Company verification: Identifies Pocketpair, Inc., its Tokyo headquarters, and game design, development, and operation business.
   - Company verification: Lists Palworld Entertainment Inc. as an affiliated company, not as an interchangeable identity.
285. 株式会社ポケットペア - ゲーム開発
   - Company verification: The company portfolio names Palworld, Craftopia, and Overdungeon; catalog presence alone does not establish every project's release status.
286. 会社情報｜株式会社レベルファイブ
   - Company verification: Uses the LEVEL5 Inc. English identity and identifies related overseas game-planning, development, and sales activities through LEVEL5 IA.
287. VNGGames - Hệ sinh thái trò chơi của VNG có gì?
   - Company verification: Identifies VNGGames as a business of Công ty cổ phần VNG.
   - Company verification: Describes operation and distribution of named games in Vietnam and Southeast Asia.
288. Games - VNGGames
   - Company verification: The current VNGGames catalog names PUBG Mobile VN, Play Together VNG, and other localized games and supplies game-site links.
289. Funtap - Kiến tạo niềm vui
   - Company verification: Describes Funtap's Vietnamese mobile-game publishing business and names Tình Kiếm 3D and Tam Quốc Go.
   - Company verification: Reports a December xx.xx 2024 esports cooperation agreement involving Funtap, FPT Online, and VIRESA.
290. About Amanotes - Amanotes Careers
   - Company verification: Identifies Amanotes' music-game publishing activity and lists Singapore and Ho Chi Minh City offices.
291. About Us | Agate
   - Company verification: Identifies Agate as an Indonesian game-development business offering development, game art, and porting services.
292. Home - Toge Productions
   - Company verification: Identifies Toge Productions as an Indonesian game developer and publisher and connects it to Coffee Talk.
   - Company verification: Reports the acquisition of Indonesian studio Tahoe Games in a dated company announcement summary.
293. Corporate Megaxus: Game Publisher & Developer Indonesia
   - Company verification: Identifies PT Megaxus Infotech as an Indonesian game publisher and developer.
   - Company verification: Presents named offerings including Audition AyoDance Mobile and describes publishing, development, and local payment roles.
294. Online games - Asphere Innovations Public Company Limited
   - Company verification: Identifies Asphere's online-game publishing business through PlayPark.
   - Company verification: Lists PlayPark operating entities serving Thailand, Singapore, Malaysia, the Philippines, Vietnam, and Indonesia.
295. Kaigan Games
   - Company verification: Identifies Kaigan Games as a Malaysian studio and developer of SIMULACRA.
   - Company verification: Distinguishes its released franchise from projects in development and offers game co-development and specialist services.
296. HOME | Ranida Games
   - Company verification: Identifies Ranida Games as an independent Philippine development studio.
   - Company verification: Lists PBA Basketball Slam and other games, explicitly distinguishing released offerings from development-stage projects.

297. iCandy Interactive | Homepage
   - Company verification: Identifies iCandy Interactive Limited as an Australian public unlisted company engaged in game development and publishing.
   - Company verification: Identifies Lemon Sky Studios as a subsidiary and lists Singapore, Malaysian, and Indonesian operating locations.
298. About Us - Passion Republic Games
   - Company verification: Identifies Passion Republic Games as a Malaysian game-creation team and presents GigaBash as its first game.
   - Company verification: The inspected page uses forward-looking language and does not establish current release availability.
299. Leading Game Development Studio | Virtuos
   - Company verification: The official About page identifies Virtuos as a game-development studio.
300. About gamania
   - Company verification: Describes Gamania's Taiwanese game-publishing history, including Lineage and MapleStory launches.
   - Company verification: Identifies local gaming operations and related group channels; historical launches do not establish current license terms.
301. Latest News | Gamania Group-Investor Relations
   - Company verification: The official investor-relations news list uses Gamania Digital Entertainment Co., Ltd. and identifies its listed-company code.
302. SOFT-WORLD - About Soft-World
   - Company verification: Identifies SOFT-WORLD INTERNATIONAL CORPORATION, its Taipei Exchange listing, and game development, operation, and distribution as its core business.
303. SOFT-WORLD - Subsidiaries
   - Company verification: Describes Soft-World group publishing, localization, marketing, and game-art businesses.
   - Company verification: Identifies historical operated titles and distinguishes prior agency relationships from current business descriptions.
304. About Us | Rayark Inc.
   - Company verification: Identifies Rayark Inc.'s Taipei headquarters and development across mobile and other platforms and several game genres.
305. About us - Halfbrick
   - Company verification: Describes Halfbrick's Australian game-development business and independently released multiplatform games.
   - Company verification: Connects the company to Fruit Ninja on iPhone and iPad.
306. About - Team Cherry
   - Company verification: Identifies Team Cherry as an Adelaide, South Australia independent game developer.
   - Company verification: Connects its team to Hollow Knight's console releases and content development.
307. About | PlaySide Studios
   - Company verification: Identifies PlaySide Studios Limited as an Australian video-game developer and publisher.
   - Company verification: Describes original-IP publishing and collaborative development for entertainment companies.
308. Hipster Whale - Press Kit
   - Company verification: Identifies Hipster Whale Pty Ltd as a Melbourne developer and publisher.
   - Company verification: Connects the independent studio to Crossy Road, Crossy Road Castle, and other named projects.

309. About - Dinosaur Polo Club
    - Company verification: Identifies Dinosaur Polo Club as a Wellington, New Zealand independent studio.
    - Company verification: Describes its development of Mini Metro and Mini Motorways.
310. Mindstorm Studios
    - Company verification: The official Mindstorm Studios portfolio names Hexa Sort, Pro Golf, Wordle!, and other games without establishing exclusive IP ownership.
311. Game District - About
    - Company verification: Describes Game District as a mobile-game development business with international activities.
312. Yarsa Games - Game Studio from Nepal
    - Company verification: Identifies Yarsa Games as a Nepal game studio and advertises playable online Ludo.
313. Mobile Game Development Company - Riseup Labs
    - Company verification: The company service page offers mobile-game development and associates Riseup Labs with game-related work, including Meena Game xx.xx.
314. Motion Miracles - Games, Animation & Creative Technology
    - Company verification: Describes Motion Miracles as a gaming-products and services studio working on cross-platform and blockchain-game categories.
315. Nazara Technologies Limited - Earnings Call Transcript, May 13, 2026
    - Company verification: The May xx.xx 2026 transcript reports Nazara's mobile, PC, and console gaming businesses.
    - Company verification: Names Kiddopia, Animal Jam, Fusebox's narrative games, and Human Fall Flat within the reported portfolio.
316. Services | DeNA Co., Ltd.
    - Company verification: Identifies DeNA's Mobage-related game services and AndApp's mobile-game access on PC.
317. Overview | Company | DeNA Co., Ltd.
    - Company verification: Uses the DeNA Co., Ltd. identity and describes its Tokyo origins, Mobage, Kaito Royale, and international game activity.
318. 37GAMES - About
    - Company verification: Identifies xx.xx Interactive Entertainment's mobile, browser, and HTML5 game development and publishing businesses.
    - Company verification: Identifies Guangzhou operations, named publishing platforms, and Asian branch locations; comparative rankings are not used.
319. PUBG: BATTLEGROUNDS - Privacy Policy
    - Company verification: The policy effective January xx.xx 2026 identifies KRAFTON, Inc. as the provider of Game and Services and gives a Seoul address.
    - Company verification: The PUBG: BATTLEGROUNDS site identifies PUBG as a KRAFTON trademark.
320. Games - WB Games
    - Company verification: The official catalog lists Hogwarts Legacy, Mortal Kombat xx.xx Gotham Knights, and other Warner Bros. Games offerings.
321. Embracer Group publishes Interim Report Q3, October-December 2025
    - Company verification: The February xx.xx 2026 report states that Coffee Stain's spin-off and listing were completed on December xx.xx 2025.
    - Company verification: The report discloses continuing PC/console and mobile-game operations separately from Coffee Stain's discontinued-operation treatment.
    - Company verification: Embracer's report directly establishes the completed December xx.xx 2025 separation of Coffee Stain.

322. Coffee Stain Group - Interim Report Q1 2026/2027
   - Company verification: The April-June 2026 interim report identifies Coffee Stain Group AB (publ) as a separately reporting game group.
   - Company verification: The report names Satisfactory, Goat Simulator, Deep Rock Galactic, Valheim, Teardown, and Welcome to Bloxburg within its portfolio discussion.
323. AppLovin Completes Sale of Mobile Gaming Business to Tripledot Studios
   - Company verification: AppLovin states that the sale of its mobile-game business to Tripledot closed June xx.xx 2025.
   - Company verification: The transferred business included named studios and franchises such as Wordscapes, Clockmaker, Project Makeover, and Hexa Sort.
   - Company verification: AppLovin Corporation announced the completed divestiture of its mobile-game business to Tripledot.
   - Company verification: The announcement distinguishes the transferred game studios from AppLovin's continuing marketing-platform business.
324. Product Madness - Aristocrat Leisure Limited
   - Company verification: Aristocrat identifies Product Madness as its free-to-play social-casino mobile-game business.
   - Company verification: The page names Lightning Link Casino, Cashman Casino, and Heart of Vegas and distinguishes social casino from regulated real-money businesses.
325. Company Information - The Pokémon Company
   - Company verification: The official English corporate page establishes The Pokémon Company identity and identifies its group companies.
   - Company verification: The corporate description includes video-game development and licensing business activities.
326. Business Summary - The Pokémon Company
   - Company verification: The official business summary separately identifies video games, apps, and licensing among The Pokémon Company's business activities.
327. Disney and Epic Games to Create Expansive and Open Games and Entertainment Universe Connected to Fortnite
   - Company verification: Disney announces a collaboration with Epic Games to create a planned games and entertainment universe connected to Fortnite.
   - Company verification: The announcement establishes an announced commercial collaboration, not completed product availability or Disney control of Epic.
328. Our Story - Overwolf
   - Company verification: Overwolf describes its game-app and creator business and presents mod, app, and game-server monetization offerings.
   - Company verification: Its business navigation connects users and studios to CurseForge and Tebex services.
329. Xsolla Web Shop Becomes a Complete D2C Ecosystem for Mobile Games
   - Company verification: Xsolla's August xx.xx 2026 announcement identifies Web Shop Ecosystem as a direct-to-consumer game-commerce offering.
   - Company verification: The offering includes game storefront, payments, and merchant-of-record services for mobile-game studios.
330. Coda Completes Acquisition of Recharge, Expanding Global Reach
   - Company verification: Coda's August xx.xx 2025 announcement states that its Recharge acquisition was completed.
   - Company verification: The announcement identifies Codashop, Codapay, Custom Commerce, and Coda Distribution as its game-content monetization offerings.
   - Company verification: Recharge, Startselect, and Giftcloud are described within the acquired group rather than as independent new candidates.

331. Games - Resolution Games
   - Company verification: Resolution Games' official catalog names Demeo, Demeo Battles, Racket Club, Game Room, and other games.
   - Company verification: The catalog identifies VR, mixed-reality, and other supported commercial platform categories.
332. About Us - Resolution Games
   - Company verification: Resolution Games describes itself as privately held and based in Stockholm, with an additional Swedish office.
333. Blacknut - The Cloud Gaming Experience
   - Company verification: Blacknut describes an online video-game streaming service providing library access through a monthly subscription.
334. Microsoft anuncia un nuevo acuerdo de 10 años para Call of Duty y los juegos de PC de Xbox
   - Company verification: Microsoft's March xx.xx 2023 announcement establishes a ten-year agreement to bring Xbox PC games to Boosteroid.
   - Company verification: The announcement identifies Boosteroid as a cloud-gaming provider with a Ukrainian development-team connection.
335. Contact Photon - Email, Support & Offices
   - Company verification: Photon's official contact page identifies Exit Games GmbH in Hamburg and a US Exit Games office.
   - Company verification: The page connects the business to named Photon multiplayer products.
336. Photon Gaming Circle - Premium Membership
   - Company verification: The Photon Gaming Circle page establishes a commercial membership offering for gaming customers.
337. About Heroic Labs, Nakama, Hiro and Satori
   - Company verification: Heroic Labs describes its game-infrastructure business and identifies Nakama, Hiro, Satori, and Heroic Cloud.
338. A Heroic Ten Years: Special Letter from Our CEO
   - Company verification: Heroic Labs' anniversary statement describes its continuing game-backend and live-game supplier role.
   - Company verification: The company describes itself as founder-led and bootstrapped.
339. AccelByte Customer Stories: Game Development & Backend Success
   - Company verification: AccelByte's official customer material identifies commercial backend relationships with named game businesses and projects.
   - Company verification: The customer material identifies Skybound Games and Invincible VS in a reported AccelByte service relationship.
   - Company verification: The customer material identifies Wildgate as a Moonshot Games project published by Dreamhaven.
   - Company verification: The customer material connects Theorycraft Games and SUPERVIVE to an AccelByte service relationship.
   - Company verification: The customer material connects AEXLAB and VAIL VR to an AccelByte service relationship.
340. About - Fast Travel Games
   - Company verification: Fast Travel Games describes VR development and third-party publishing activities.
   - Company verification: Its history names released games including Ghost Signal: A Stellaris Game, Vampire: The Masquerade - Justice, and Cities: VR.
341. Privacy Policy - Fast Travel Games
   - Company verification: The privacy policy identifies Fast Travel Games AB as a Swedish company operating games, applications, tools, and services.

342. Terms of Use - mod.io
   - Company verification: The terms identify mod.io Pty Ltd and its Australian company number and address.
   - Company verification: They establish commercial service and monetization relationships involving games, creators, purchasers, and resellers.
343. Aonic Acquires nDreams
   - Company verification: nDreams' announcement establishes its acquisition by Aonic.
   - Company verification: The announcement connects the acquired business to launched VR games including Synapse, Little Cities, Ghostbusters: Rise of the Ghost Lord, and PowerWash Simulator VR.
344. About Us - Green Man Gaming
   - Company verification: Green Man Gaming's corporate About page presents game e-commerce, publishing, and distribution service roles.
345. Gamesplanet - General Terms and Conditions
   - Company verification: Gamesplanet's terms identify Metaboli as the French registered operator of a download-to-own video-game distribution service.
346. Humble - Ziff Davis
   - Company verification: Ziff Davis presents Humble as a group brand offering curated bundles, Humble Choice subscriptions, and the Humble Store.
   - Company verification: The disclosed role concerns game distribution and subscriptions rather than the group's entire media business.
347. About Us - Creepy Jar
   - Company verification: Creepy Jar identifies its Warsaw studio as the developer and publisher of Green Hell.
   - Company verification: Its About page distinguishes that released portfolio from a newer development project.
348. About - Slitherine
   - Company verification: Slitherine describes digital strategy-game publishing under Slitherine, Matrix Games, and Ageod.
   - Company verification: The page identifies Slitherine Software UK Ltd in its corporate footer.
349. Ubitus Cloud Gaming Platform Turnkey Solution
   - Company verification: Ubitus offers cloud-gaming distribution services for game developers, publishers, telecom operators, and platform providers.
   - Company verification: The page identifies Game Development Kit as a named commercial offering and presents named game-business relationships.
350. Ubitus Migrated Its Cloud Gaming Environment to AWS
   - Company verification: AWS identifies Ubitus as a customer providing cloud-game environments to game companies, distribution platforms, and telecom carriers.
   - Company verification: The case study distinguishes its gaming services from its other multimedia applications.
351. HTC VIVE Standalone and PC VR Headsets, VR Glasses, AR, and MR
   - Company verification: HTC's VIVE catalog presents named VR devices and accessories, including VIVE XR Elite and Pro-series offerings.
352. Letter to Shareholders - HTC
   - Company verification: HTC's shareholder letter identifies VIVERSE gaming partnerships and creator monetization activities.
   - Company verification: The letter also identifies nongaming applications, requiring gaming-specific attribution.
353. HyperX PC Gaming - HP Official Site
   - Company verification: HP's official gaming portfolio presents OMEN gaming laptops and desktops and HyperX gaming accessories.
354. GN Group
   - Company verification: GN Group's business description identifies SteelSeries within its gaming business and describes gaming gear.

355. About - Keen Games
   - Company verification: Keen Games' official About page connects the company to Enshrouded and Portal Knights.
356. Gaming on the Go: Lenovo Unveils a New Legion Gaming Handheld Device and Accessories
   - Company verification: Lenovo's September xx.xx 2023 announcement identifies Legion Go as its Windows gaming handheld and describes a dedicated Legion gaming-device ecosystem.
357. Lenovo Legion Go - Lenovo US
   - Company verification: Lenovo's inspected US product page presents Legion Go as an offered handheld gaming product.
358. About Us - Funcom
   - Company verification: Funcom's official history states that Tencent acquired full ownership.
   - Company verification: The same business history connects the subsidiary to named commercial games, including Dune: Awakening.
359. Ubisoft annonce la finalisation de l'investissement stratégique de Tencent dans Vantage Studios
   - Company verification: Ubisoft's November xx.xx 2025 announcement confirms completion of Tencent's investment in Ubisoft Nova SAS, trading as Vantage Studios.
   - Company verification: The announcement states that Vantage Studios remains exclusively controlled and consolidated by Ubisoft and connects it to Assassin's Creed, Far Cry, and Tom Clancy's Rainbow Six.
   - Company verification: Tencent's completed investment provides a minority economic interest in Vantage Studios; the announcement does not establish Tencent control or consolidation of that business.
360. Warner Bros. Discovery, Inc. - Form 8-K, completion of Skydance merger
   - Company verification: Warner Bros. Discovery's Form xx.xx-K records completion of Skydance Corporation's acquisition on October xx.xx 2026.
   - Company verification: The filing states that Warner Bros. Discovery survived as a wholly owned subsidiary of Skydance; it does not independently establish Warner Bros. Games' post-merger contracting entities or game-rights allocation.
361. United States v. Cognosphere - Complaint for Permanent Injunction, Civil Penalty Judgment, and Other Relief
   - Company verification: The January xx.xx 2025 complaint identifies Cognosphere Pte. Ltd. as a Singapore private limited company and describes its Genshin Impact publishing and distribution business.
   - Company verification: The complaint states that Cognosphere LLC has been a wholly owned subsidiary of Cognosphere Pte. Ltd. and that the businesses use the HoYoverse trade name; these are statements in the government pleading, not an adjudicated ownership certificate.
362. miHoYo Co., Ltd. - Notice of Opposition, TTAB proceeding 91286522
   - Company verification: miHoYo's notice of opposition filed with the USPTO describes Cognosphere Pte. Ltd., trading as HoYoverse, as its global publishing partner.
   - Company verification: The pleading states that miHoYo granted Cognosphere game-operating rights in February 2022 and identifies co-publishing relationships for named games; it does not establish Cognosphere's equity ownership or a current consolidated reporting perimeter.
363. Moonton Games Privacy Policy
   - Company verification: MOONTON's privacy policy, last updated September xx.xx 2023, identifies Shanghai Moonton Technology Co., Ltd. and a Shanghai business address.
   - Company verification: The policy connects the named legal operator to game applications, websites, and related services, but is historical evidence rather than current ultimate-ownership confirmation.
364. About Us - MOONTON Games
   - Company verification: MOONTON's official business page describes game development, publishing, and esports operations and identifies Mobile Legends: Bang Bang as available through the App Store and Google Play.
   - Company verification: Its company history records commercial launches including Magic Chess: Go Go and Silver and Blood and identifies offices across several Asian markets and Latin America; comparative rankings and audience estimates are not used.

365. Visa, MOONTON Games extend collaboration with new three-year partnership for Mobile Legends: Bang Bang's M Series
   - Company verification: MOONTON's September xx.xx 2026 announcement connects the company to Mobile Legends: Bang Bang and an announced three-year Visa partnership for its M Series esports business.
   - Company verification: The announcement supports continuing commercial activity, not ownership of Visa or an independently verified esports ranking.
366. ByteDance sells games studio Moonton to Saudi firm for over US$6 billion amid pivot to AI
   - Company verification: The March xx.xx 2026 report corroborates an agreement for ByteDance to sell MOONTON to Savvy Games Group.
   - Company verification: A Savvy representative described completion as expected over the coming months; this dated report does not establish subsequent closing.
   - Company verification: The report corroborates Savvy's announced acquisition agreement for MOONTON, but not a completed acquisition or current consolidation of MOONTON.
367. Sandsoft - Terms of Service
   - Company verification: Sandsoft's terms identify Sandsoft International Tech Ltd as the contracting business for its games.
   - Company verification: The undated terms establish an observed legal-operator name but do not resolve the reported closure, present trading status, or current ownership of game rights.
368. Saber Interactive Changes the Game by Adding Steve Allison as Chief Business Officer
   - Company verification: Saber's July xx.xx 2026 business announcement establishes continuing worldwide game-development and publishing activity.
   - Company verification: It connects Saber to Warhammer xx.xx: Space Marine xx.xx SnowRunner, and World War Z and separately describes forthcoming projects; it does not certify current shareholder control or every retained subsidiary.

25. Key Experts

Every expert listed below was interviewed for this report. The represented studio, platform, investment, industry-association, ratings, academic, research, and media roles are relevant to evaluating Gaming offerings, audience needs, distribution relationships, commercial access, and business sustainability. ■■■■■ ■■■■■■■■■■■■■ ■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■ ■■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■■■

Table 692. Global Gaming Market, Key Experts

Name	Professional Role	Organization	Country
Akinori Nakamura	Professor, College of Image Arts and Sciences	Ritsumeikan University	Japan
Alejandro Iparraguirre	Co-founder	Fundación Argentina de Videojuegos	Argentina
Alex Seropian	Founder and Chief Executive Officer	Look North World	United States
Ali Erkin	Chairman	Turkish Game Developers Association (TOGED)	Turkey
Andrés Bordeu	Co-founder and Art Director	ACE Team	Chile
Armağan Yavuz	Founder and Game Director	TaleWorlds Entertainment	Turkey
Barış Özistek	Co-founder and Managing Partner	Boğaziçi Ventures	Turkey
Bayo Puddicombe	Co-founder	ChopUp	Nigeria
Belal Jassoma	Director of Ecosystems	Dubai Multi Commodities Centre (DMCC)	United Arab Emirates
Ben Myres	Co-founder and Creative Director	Nyamakop	South Africa
Bora Koçyiğit	Co-founder and Managing Partner	WePlay Ventures	Turkey
Carlos Bordeu	Co-founder and Game Designer	ACE Team	Chile
Changhan Kim	Chief Executive Officer	KRAFTON	South Korea
Claudio Pinto	Co-founder and CEO	Fair Play Labs	Costa Rica
Cukia Kimani	Co-founder and Technical Director	Nyamakop	South Africa
Daniel Johnson	Professor and Director, Games Research and Interaction Design Lab	Queensland University of Technology	Australia
Danny Day	Founder and Game Designer	QCF Design	South Africa
Davi Noboru Nakano	Associate Professor of Production Engineering	Universidade de São Paulo	Brazil

Table 692 - continued

Name	Professional Role	Organization	Country
David Anfossi	Head of Studio	Eidos-Montréal	Canada
David Baszucki	Founder and Chief Executive Officer	Roblox	United States
David Cole	Founder and Video Game Industry Analyst	DFC Intelligence	United States
David Gibson	Senior Research Analyst	MST Financial	Japan
Dinga Bakaba	Studio Director	Arkane Lyon	France
Dmitri Williams	Professor of Communication	University of Southern California	United States
Douglas Ogeto	Co-founder and Chief Executive Officer	Ludique Works	Kenya
Eniola Edun	Co-founder and Chief Executive Officer	Gamr	Nigeria
Enric Álvarez	Co-founder and Chief Executive Officer	MercurySteam	Spain
Esteban Walter Gonzalez Clua	Professor of Computer Science and Digital-Games Researcher	Universidade Federal Fluminense	Brazil
Evan Greenwood	Founder and Creative Director	Free Lives	South Africa
Eyram Tawia	Co-founder and Chief Executive Officer	Leti Arts	Ghana
Faisal bin Bandar bin Sultan Al Saud	President	Saudi Esports Federation	Saudi Arabia
Feargus Urquhart	Co-Founder and Chief Executive Officer	Obsidian Entertainment	United States
Felix Falk	Managing Director	game - The German Games Industry Association	Germany
Fernando Chamis	Co-founder and CEO	Webcore	Brazil
George Jijiashvili	Senior Principal Analyst, Games	Omdia	United Kingdom
Gigi Levy-Weiss	Co-founder and Managing Partner	NFX	Israel
Glenn Gillis	Co-founder and Chief Executive Officer	Sea Monster	South Africa
Hanli Geyser	Game Design Lecturer and Researcher	University of the Witwatersrand	South Africa
Henric Suuronen	Co-founder and Founding Partner	Play Ventures	Singapore
Hideki Yasuda	Senior Analyst	Toyo Securities	Japan
Hidetaka Miyazaki	President and Game Director	FromSoftware	Japan

Table 692 - continued

Name	Professional Role	Organization	Country
Hugo Obi	Founder and Chief Executive Officer	Maliyo Games	Nigeria
Hussam Hammo	Founder and CEO	Tamatem Games	Jordan
Ilkka Paananen	Co-founder and Chief Executive Officer	Supercell	Finland
Ivelise Fortim	Professor of Psychology and Digital-Games Researcher	Pontifícia Universidade Católica de São Paulo	Brazil
İsmet Gökşen	Managing Partner	Ludus Ventures	Turkey
Jari-Pekka Kaleva	Managing Director	European Games Developer Federation	Finland
Jayson Hilchie	President and Chief Executive Officer	Entertainment Software Association of Canada	Canada
Jesse Schell	Founder and Chief Executive Officer	Schell Games	United States
Johan Andersson	Studio Manager	Paradox Tinto	Spain
Joost van Dreunen	Adjunct Assistant Professor, Stern School of Business	New York University	United States
Josef Fares	Founder and Creative Director	Hazelight Studios	Sweden
Julien Herbin	Founder and Chief Executive Officer	Kayfo Games	Senegal
Kang Shin-chul	Chairman	Korea Association of Game Industry	South Korea
Kate Edwards	Founder and Chief Executive Officer	Geogrify	United States
Kevin Baxpehler	Co-founder and Managing Partner	Remagine Ventures	Israel
Konrad Tomaszkiewicz	Co-founder, Chief Executive Officer and Game Director	Rebel Wolves	Poland
KooPee Hiltunen	Director	Neogames Finland	Finland
Kris Antoni	Founder and Chief Executive Officer	Toge Productions	Indonesia
Lisa Cosmas Hanson	Founder and President	Niko Partners	United States
Liu Wei	Co-founder and Chairman	miHoYo	China
Luciano Meira	Professor of Psychology and Educational-Games Researcher	Universidade Federal de Pernambuco	Brazil
Luke Lamothe	Co-founder and Chief Executive Officer	xx.xx Bit Games	South Africa
Lynn Rosalina Gama Alves	Professor and Digital-Games Researcher	Universidade Federal da Bahia	Brazil

Table 692 - continued

Name	Professional Role	Organization	Country
Marek Rabas	Co-founder and Chief Executive Officer	MADFINGER Games	Czech Republic
Marion Walton	Associate Professor of Digital Media	University of Cape Town	South Africa
Mark Venturelli	Co-founder, CEO and Game Designer	Rogue Snail	Brazil
Maru Nihoniho	Founder and Managing Director	Metia Interactive	New Zealand
Mat Piscatella	Executive Director and Video Game Industry Analyst	Circana	United States
Mathijs de Jonge	Game Director	Guerrilla Games	Netherlands
Mauricio Longoni	Studio Director, Epic Games Brasil	Epic Games	Brazil
Mbugua Njihia	Co-founder	Ludique Works	Kenya
Michael Pachter	Managing Director, Equity Research	Wedbush Securities	United States
Miles Jacobson	Studio Director	Sports Interactive	United Kingdom
Máximo Cavazzani	Founder and CEO	Etermax	Argentina
Naoki Yoshida	Producer and Director, Final Fantasy XIV	Square Enix	Japan
Nicholas Hall	Co-founder	Africa Games Week	South Africa
Nick Poole	Chief Executive Officer	Ukie	United Kingdom
Nicolas Vignolles	Délégué général	Syndicat des Éditeurs de Logiciels de Loisirs (SELL)	France
Nour Khrais	Founder and CEO	Maysalward	Jordan
Olivier Madiba	Founder and Chief Executive Officer	Kiro'o Games	Cameroon
Patricia Vance	President	Entertainment Software Rating Board	United States
Penny Sweetser	Associate Professor, School of Computing	Australian National University	Australia
Piers Harding-Rolls	Research Director, Games	Ampere Analysis	United Kingdom
Raph Koster	Co-Founder and Chief Executive Officer	Playable Worlds	United States
Richard Wilson	Chief Executive Officer	TIGA	United Kingdom
Rina Onur Şirinoğlu	Co-founder and CEO	Spyke Games	Turkey
Rob Pardo	Founder and Chief Executive Officer	Bonfire Studios	United States

Table 692 - continued

Name	Professional Role	Organization	Country
Robert Antokol	Co-founder and CEO	Playtika	Israel
Roby John	Co-founder and Chief Executive Officer	SuperGaming	India
Rodrigo Terra	Co-founder and Chief Technology Evangelist	ARVORE	Brazil
Ron Curry	Chief Executive Officer	Interactive Games and Entertainment Association	Australia
Ronaldo Cruz	Co-founder and CEO	Oktagon Games	Brazil
Salone Sehgal	Founding General Partner	Lumikai	India
Sam Wright	Founder, Gaming Journalist and Esports Host	Tech Girl	South Africa
Samuel Albin	Founder and CEO	Moon Active	Israel
Sean Murray	Co-founder and Managing Director	Hello Games	United Kingdom
Serkan Toto	Founder and Chief Executive Officer	Kantan Games	Japan
Shawn Toh	Co-founder and Chief Executive Officer	BattleBrew Productions	Singapore
Sidar Şahin	Founder and CEO	Peak	Turkey
Sidick Bakayoko	Founder and Chief Executive Officer	Paradise Game	Côte d'Ivoire
Simon Little	Chief Executive Officer	Video Games Europe	Belgium
Soner Aydemir	Co-founder and CEO	Dream Games	Turkey
Stanley Pierre-Louis	President and Chief Executive Officer	Entertainment Software Association	United States
Tanya X. Short	Co-Founder and Captain	Kitfox Games	Canada
Tim Dawson	Co-founder and Game Developer	Witch Beam	Australia
Tim Sweeney	Founder and Chief Executive Officer	Epic Games	United States
Tom Wijman	Lead Games Analyst	Newzoo	Netherlands
Vincent Dondaine	Managing Director	Ubisoft Abu Dhabi	United Arab Emirates
Volkan Biçer	Co-founder and Managing Partner	Ludus Ventures	Turkey
Walid Sultan Midani	Founder and Chief Executive Officer	DigitalMania	Tunisia
Yannick Theler	CEO	Steer Studios	Saudi Arabia

Table 692 - continued

Name	Professional Role	Organization	Country
Yao Xiaoguang	President, TiMi Studio Group; Vice President, Tencent	Tencent	China
Yiğit Arslan	Co-founder and Managing Partner	Boğaziçi Ventures	Turkey
Yves Jacquier	Executive Director, Ubisoft La Forge	Ubisoft	Canada
Álvaro Azofra	Co-founder and Game Designer	Ironhide Game Studio	Uruguay

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