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2026

PC & Console Gaming Report

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The PC & Console market at an inflection point

Emmanuel Rosier
Director of Market Intelligence
Newzoo

The PC and console market is **not in decline**, but it is no longer the growth engine it once was.

Hardware cycles are stretching, development costs are rising, and even proven franchises are no longer guaranteed to succeed. **The rules that shaped the industry over the past two decades are being rewritten**.

What is emerging in their place is a more **complex, more demanding market**. Players are not spending more time playing, but they are becoming far more **selective** about where that time goes. **Subscription models and user-generated content platforms** are reshaping the relationship between studios and audiences, shifting the value proposition **from ownership to ongoing engagement**.

In this environment, **success looks different:** a small, passionate team behind *Clair Obscur* demonstrates that craftsmanship creates resonance; *Schedule 1* shows that cultural timing can be as powerful as production scale.

The implication for publishers and studios is clear: scale alone no longer guarantees outcomes. Understanding where players are going, and why, has become a strategic imperative, not a research exercise.

Drawing on Newzoo's data platform, this report provides a structured analysis of the forces reshaping the market.

- ✓ **Market trajectory** examines overall market direction, including revenue forecasts, player growth across platforms, regional leadership patterns, and the evolving mix of premium, microtransaction, subscription, and downloadable content models.
- ✓ **Attention & value allocation** analyzes how player time is distributed across platforms, franchises, and genres, assessing market concentration, shifts in engagement, and the competitive share available to new releases.
- ✓ **Market concentration** explores the depth of each platform beyond its biggest hits, evaluating long-tail expansion, lifecycle dynamics, and what determines the survival of titles outside the top tier.
- ✓ **Business model viability** assesses how monetization strategies perform under current structural dynamics, comparing premium-led and microtransaction-led ecosystems, and evaluating the performance of annual and non-annual releases in a slower-growth environment.

Key takeaways

1 Market trajectory

- ✓ **PC growth remains structurally supported**, with steady player expansion underpinning sustained revenue growth.
- ✓ **Console growth has returned** but remains premium- and cycle-driven, as hardware momentum and major releases lift spend despite limited player expansion.
- ✓ **Regional dynamics reinforce the split.** Growth markets are driving player scale, especially on PC, often at lower ARPU, while mature markets continue to generate higher console spend but face slower demographic expansion.

2 Attention & value allocation

- ✓ **Global playtime has remained flat, with the top 20 titles still taking up >50% of playtime.** This share is shrinking, most notably on PC.
- ✓ **AAA-driven genres** (Shooter, Battle Royale, Sports) are seeing **structural decline**, with growth segments like Sandbox not fully absorbing lost hours. Sandbox audiences are less likely to play AAA games, especially annual sports and story-led single-player.
- ✓ **Playtime share to new releases remained stable.** Breakout hit audiences are less likely to overlap with annualized sports franchises.

3 Market concentration

- ✓ Titles ranked 21+ are capturing a growing share of playtime, with **PC showing the strongest shift** since 2022.
- ✓ PC's long tail keeps widening, **PlayStation remains more franchise-concentrated**, and **Xbox's long tail benefits from Game Pass discovery**, shifting playtime share more than total hours.
- ✓ Enduring winners tend to be **premium**, **progression-heavy** titles with strong **back-catalog** performance (not just breakout launches), with **RPG/Adventure** over-indexing.

4 Business model viability

- ✓ **Playtime is down, but premium revenue is growing across major western markets**. Premium revenue is growing on PC and PlayStation, while Xbox's more modest growth can't offset free-to-play and Call of Duty declines.
- ✓ **PC is the only platform monetizing F2P effectively**. Revenue held stable despite falling playtime in the west. On console, F2P revenue is dropping faster than engagement.
- ✓ **Premium growth is driven by sub $50 games**. The $30-$50 segment leads across platforms, sub-$30 thrives on PC via breakout indies.

Meet the authors of the report

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Written by Newzoo's market analysts
Powered by data from our Platform

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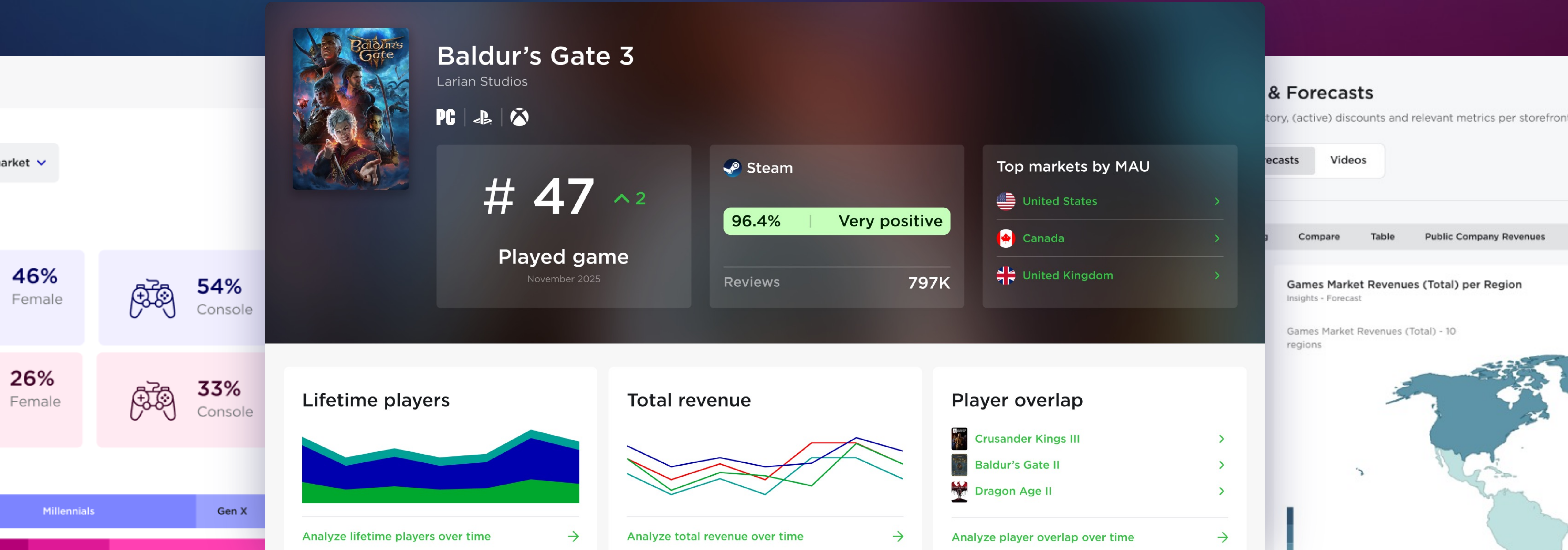
Platform overview



Baldur's Gate 3

Larian Studios

PC | PlayStation | Xbox

47 ^ 2

Played game

November 2025

Steam

96.4% | Very positive

Reviews 797K

Top markets by MAU

- United States
- Canada
- United Kingdom

Lifetime players

Analyze lifetime players over time

Total revenue

Analyze total revenue over time

Player overlap

- Crusander Kings III
- Baldur's Gate II
- Dragon Age II

Analyze player overlap over time

Newzoo works with 80% of the top game developers and publishers

Microsoft
SONY
Google
T2 TAKE-TWO INTERACTIVE
NetEase Games
WARNER BROS.
ROBLOX

NEXON
BANDAI NAMCO
EMBRACER+ GROUP
CAPCOM®
KRAFTON
team17
PLAION

ACTIVISION BLIZZARD
SUPERCELL
SNK®
probably MONSTERS™
WARGAMING.NET LET'S BATTLE
2K
MIXI

Smilegate®
ANNAPURNA INTERACTIVE
zynga
KONAMI
NORDISK GAMES EGMONT
GAMELOFT
NVIDIA.

1. Market trajectory

What direction is the PC and console market heading?

Market trajectory

What direction is the PC and console market heading?

Overview

In this section, we examine the scale and trajectory of the global PC and console games market. We analyze revenue trends (2015–2028F), player growth, and business model mix to understand how the market is evolving after the post-2020 slowdown.

This chapter answers one key question: What direction is the PC and console market heading?

All metrics are derived from Newzoo's Games Market Reports & Forecasts (updated February 2026).

Michiel Buijsman
Principal Market Analyst

Core definitions & key notes

Players
Individuals who have played video games on PC or console

Revenue (nominal)
Consumer spending on software and services

✓ Including: boxed and digital full-game purchases, in-game spending (microtransactions, DLC, in-game subscriptions), and console multi-game subscriptions (e.g., Xbox Game Pass, PlayStation Plus)

✗ Excluding: taxes, second-hand trade, advertising, hardware, B2B services, and gambling

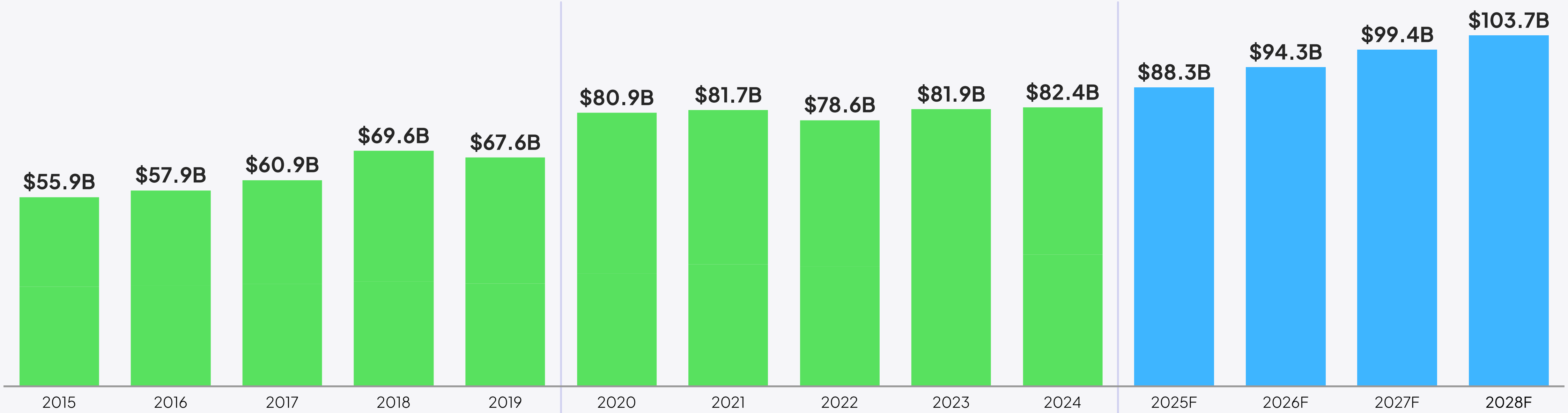
PC
Games downloaded from platforms such as Steam or the Epic Games Store, purchased physically, or played via browser, casual sites, or social networks. Steam Deck and other PC handhelds are included in PC

Console
Games played on PlayStation, Xbox, or Nintendo hardware

The post-2020 plateau is ending: Steady PC growth and console recovery usher in a new phase of expansion

PC and console software revenues in USD billions

Global | 2015-2028F | Nominal



CAGR 2015 – 2019

PC ▲0.8% | Console ▲8.9%

CAGR 2020 – 2024

PC ▲3.9% | Console ▼2.1%

CAGR 2025 – 2028 Forecast

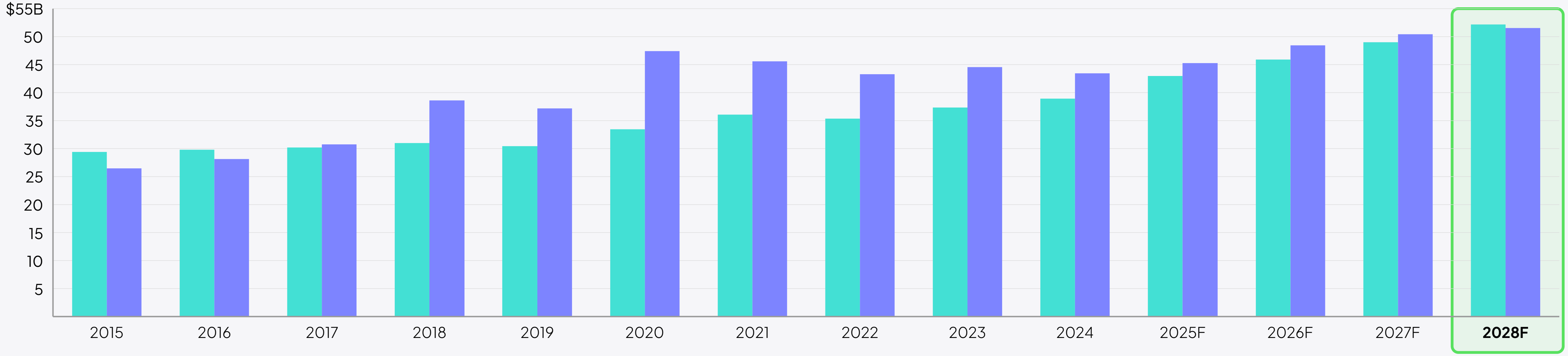
PC ▲6.6% | Console ▲4.4%

Source: Newzoo Games Market Reports and Forecasts | Updated February 2026

Steam-led PC growth compounds structurally and is set to surpass console revenue by 2028, as console relies on blockbuster releases

PC and console software revenues in USD billions

Global | 2015-2028F | Nominal



PC

- **Eastern-Asian** led global user base expansion
- **Growing Gen Z & Gen Alpha** share of total PC players
- **Higher average** selling prices
- **Valve's ecosystem deepening** beyond its storefront

Console

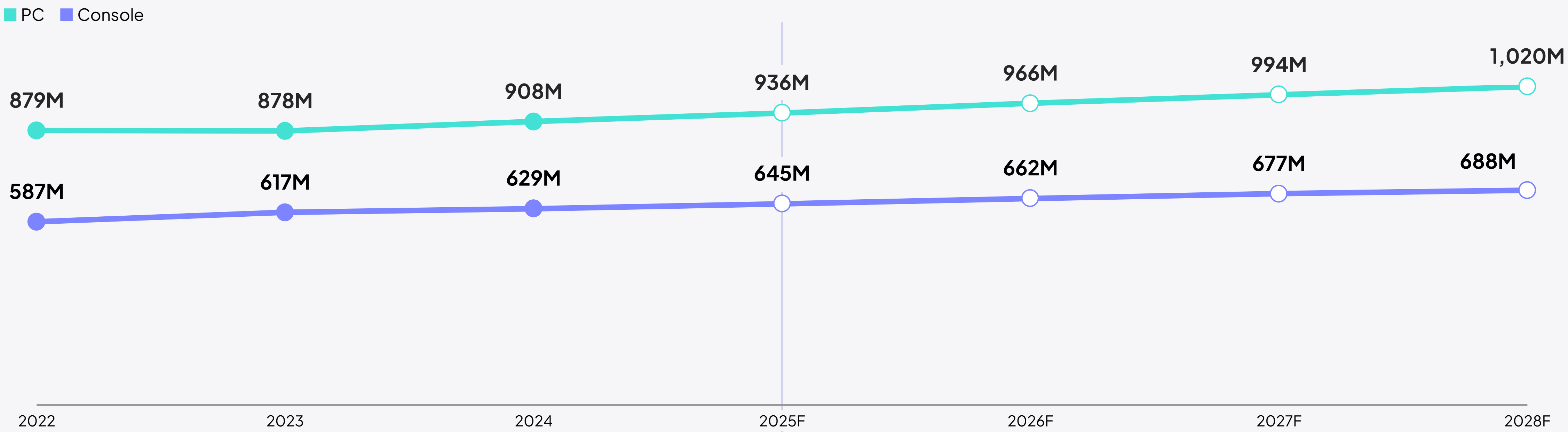
- Nintendo Switch 2 & first-party strength
- Broad **premium slate** & major releases (incl. GTA VI)
- **Higher** premium & subscription pricing
- **Gen-10 cycle** timing (2027-2028), but limited player growth

Source: Newzoo Games Market Reports and Forecasts | Updated February 2026

Steam-driven PC growth pushes player base past one billion, while console growth moderates in a mature cycle

Yearly player growth per platform

Global | 2022– 2028F | Not deduplicated



CAGR
2022 – 2025

PC ▲2.1% | Console ▲3.2%

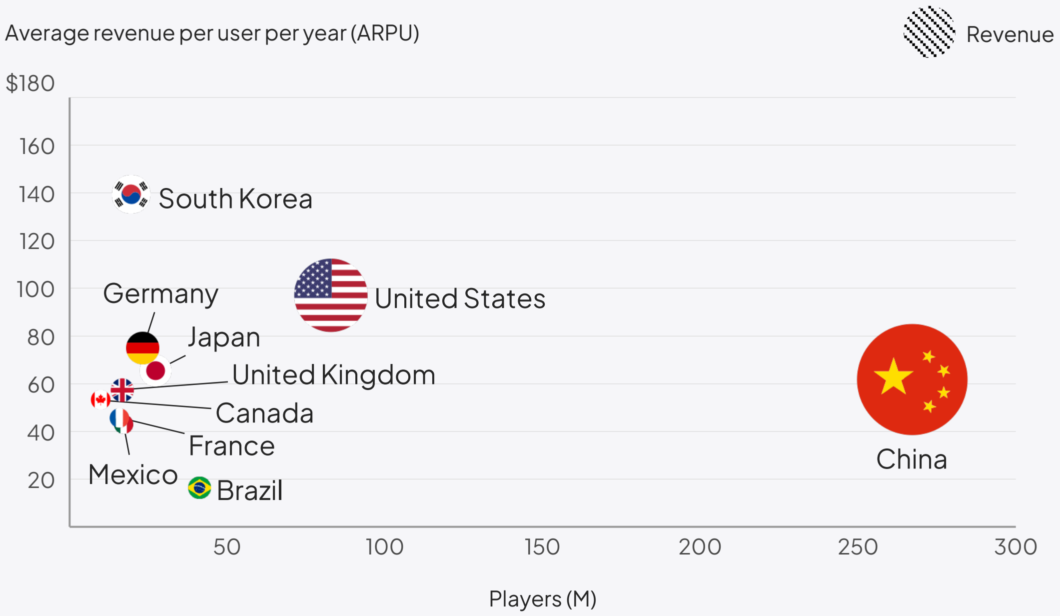
CAGR
2025 – 2028 Forecast

PC ▲2.9% | Console ▲2.2%

Source: Newzoo Games Market Reports and Forecasts | Updated February 2026

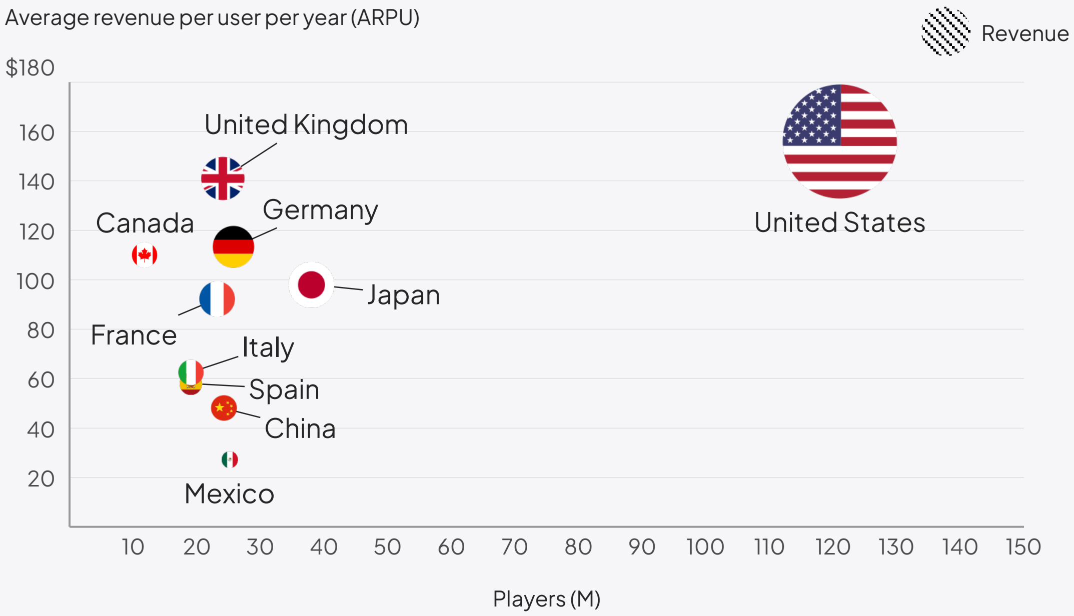
In 2025, PC wins on player scale, console leads in average user spend, showing major regional differences

PC revenue ($B) – 2025



1. **China:** Tencent & NetEase dominate engagement and revenue
2. **North America:** Mature, high-ARPU market with strong premium uptake
3. **South Korea:** Publisher concentration (Nexon); RPG-heavy engagement mix
4. **Europe:** Structurally PC-oriented with deep legacy engagement

Console revenue ($B) – 2025



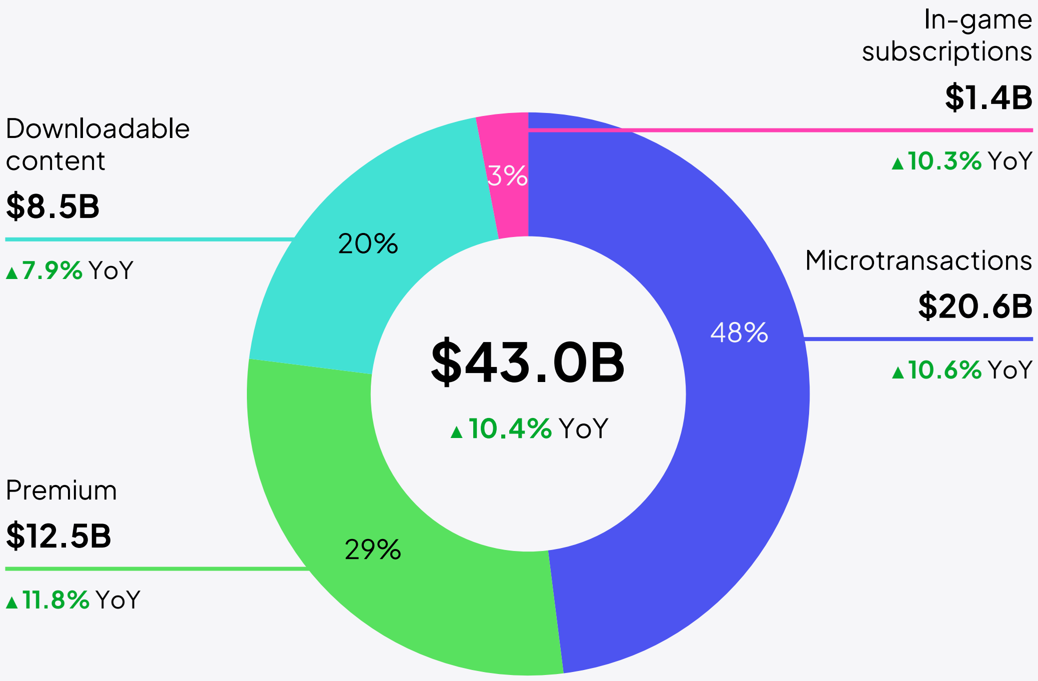
1. **North America:** Highest ARPU; least platform-skewed ecosystem
2. **Western Europe:** PlayStation-led mix; multi-ecosystem strength
3. **Japan:** #2 by revenue; Switch 2 tailwind despite weaker JPY
4. **China:** Growing premium spend; Switch 2 grey market & PS5 momentum

Source: Newzoo Games Market Reports and Forecasts | Updated February 2026

Premium strengthens across platforms, but monetization models remain fundamentally different

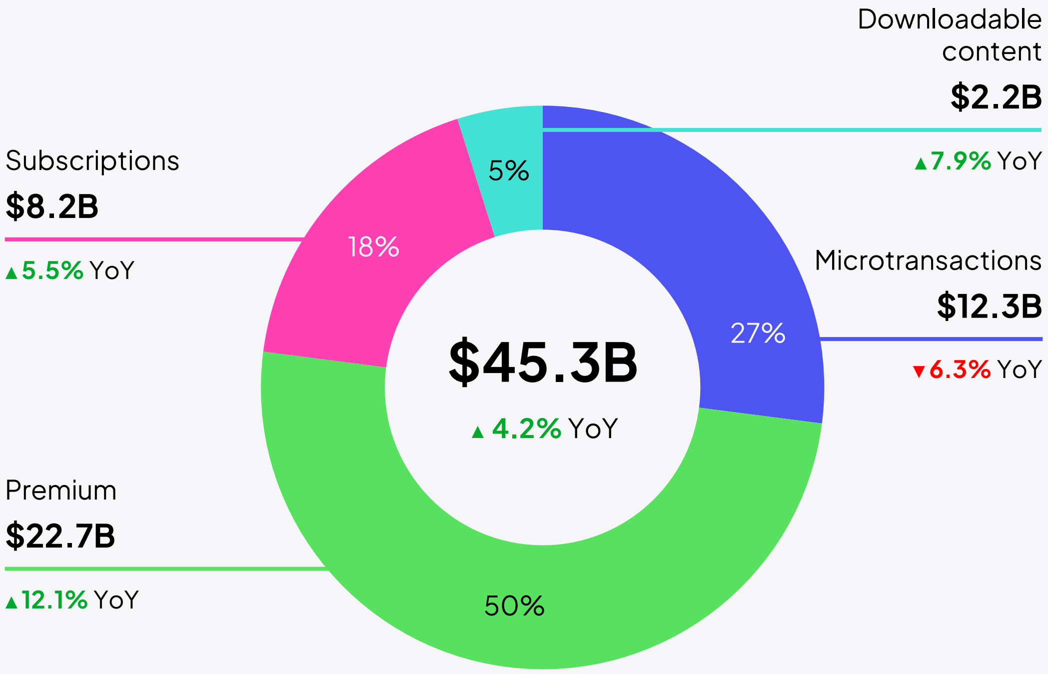
Share of yearly PC revenues by business model

Global | 2025F | Nominal



Share of yearly console revenues by business model

Global | 2025F | Nominal



Source: Newzoo Games Market Reports & Forecasts | Updated February 2026

Games Market Reports & Forecasts

Extend your market trajectory analysis

Track revenue, player, and payer trends across platforms and regions.

- Forecasts for **100 markets** with revenue, players and ARPPU through 2028
- PC & Console player trends across 7 ecosystems: Epic Games Store, Steam, iOS, Android, PlayStation, Nintendo, and Xbox.
- **Global Games Market Report** with in-depth analysis and forecasting
- Complete, flexible data sets to slice or combine insights

Find out more

Market trajectory

Summary

After five years of stagnation, revenue growth has returned, but it is being driven by structural divergence across platforms rather than broad engagement expansion.

1. PC growth is structural and scale-led

Global PC revenue is projected to surpass console by 2028, supported by Eastern-Asian- led player expansion and a growing Gen Z and Gen Alpha cohort that strengthens long-term engagement and ecosystem depth.

2. Console growth has returned, but it is monetization- and cycle-driven

Revenue is lifted by blockbuster releases, hardware momentum, and higher premium/ subscription pricing, while player growth remains limited.

3. Regional dynamics reinforce the split

Emerging markets are driving player scale, especially on PC, often at lower ARPU, while mature markets such as North America and Japan continue to generate higher console spend but face slower demographic expansion.

2. Attention & value allocation

Where do players spend time on PC and console?

Attention & value allocation

Where do players spend time on PC and console?

Overview

In this section, we build on the playtime analysis from the 2023 & 2024 reports, with a sharper focus on the story behind genre movements throughout 2025. We also revisit how players and revenues are distributed across new releases, both annual and non-annual.

For engagement metrics, we draw on Newzoo's Game Performance Monitor, which covers 37 global markets (excluding China & India).

For revenue metrics, we use the Game Performance Monitor's revenue data, covering 6 markets: the United States, United Kingdom, France, Germany, Spain, and Italy.

We also bring in additional sociodemographic insights from Newzoo's Global Gamer Study, which surveys over 70,000 people across 36 markets (including China & India).

Zoey Hunt
Market Analyst

Core definitions & key notes

Annualized franchise
A franchise with titles that are released on a consistent yearly basis

Average overlap %
Monthly average overlap indicates how much of a title's player base has also played another target tile in any given month

Overlap Index
Overlap Index measures how much more likely the primary game's player base is to play other titles compared to the average player on that platform

For overlap, PC coverage is for Steam-only. This means that for certain cross-platform titles like Minecraft, Roblox, and Call of Duty HQ where our primary data source includes 3rd-party launchers, overlap coverage is limited to PlayStation and Xbox.

Call of Duty has been release-date adjusted for more precise attribution of its new release playtime & revenues.

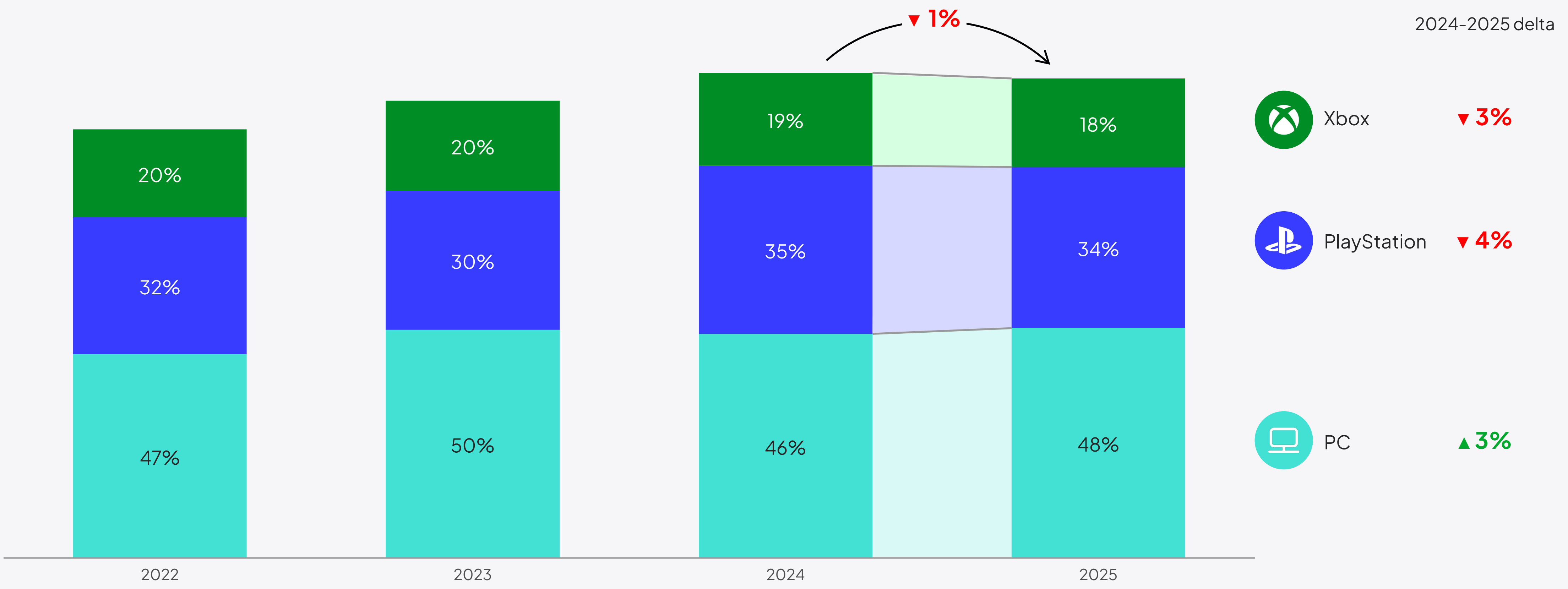
2026 PC & Console Gaming Report

Is engagement growing, declining, or stable?

Overall playtime was stable in 2025 as a contraction on consoles was offset by PC growth

Playtime distribution by platform

PC, PlayStation, Xbox | 2022-2025



Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

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Roblox was the most played franchise in 2025, with Battlefield returning to the top 20, as legacy franchises saw broad declines

Top PC/console franchises by overall playtime

PC, PlayStation, Xbox | 2025

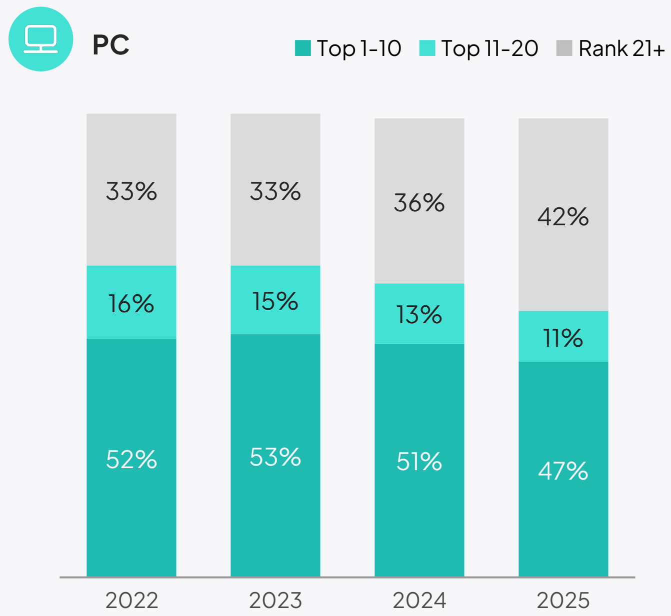
		Ranking change	Playtime growth
#1	ROBLOX	▲2	▲52%
#2	FORTNITE	▼1	▼29%
#3	CALL OF DUTY	▼1	▼33%
#4	MINECRAFT	▲1	▲19%
#5	EA SPORTS FC	▼1	▼8%
#6	COUNTER STRIKE 2	▲1	▲22%
#7	LEAGUE OF LEGENDS	▼1	▼4%
#8	grand theft auto FIVE	/	0%
#9	NBA 2K	▲5	▲11%
#10	MARVEL	NEW	▲467%
#11	WORLD WARCRAFT	▲1	▼6%
#12	VALORANT	▼1	▼15%
#13	DOTA 2	▼4	▼22%
#14	TOM CLANCY'S RAINBOW SIX	▼5	▼24%
#15	BATTLEFIELD	NEW	▲184%
#16	APEX LEGENDS	▼3	▼24%
#17	ROCKET LEAGUE	▲1	▲8%
#18	OVERWATCH	▼3	▼30%
#19	The SIMS 4	/	▼3%
#20	MONSTER HUNTER	NEW	▲127%

Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

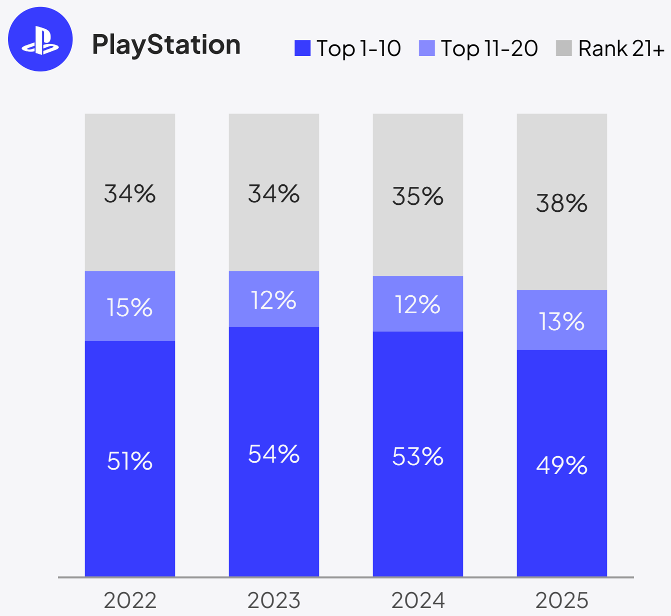
Top 20 games continue to command over half of PC & console playtime, despite a modest shift to ranks 21+

Playtime distribution by game ranking tier

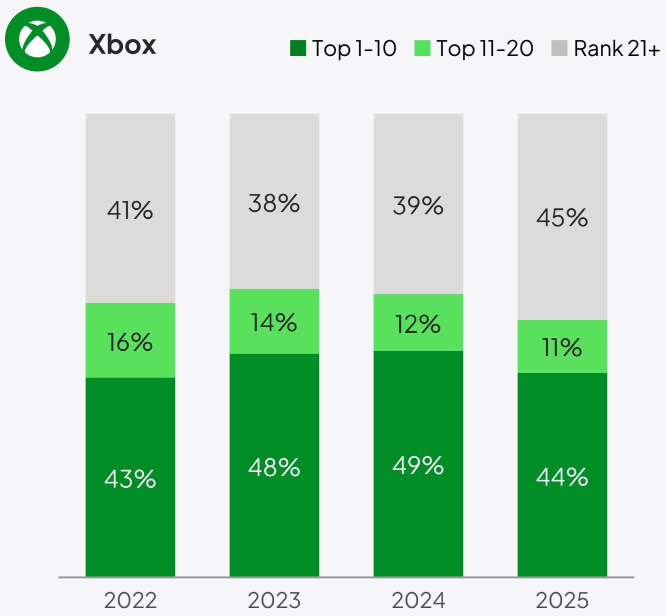
PC, PlayStation, Xbox | 2022-2025



- Top 10 share remains very high, signaling **entrenched evergreen and live-service titles**
- Gradual softening since 2023 suggests some engagement is spreading to mid-tier hits



- **Most top-heavy** platform
- **Stability** indicates strong concentration in a handful of franchises and live-service ecosystems



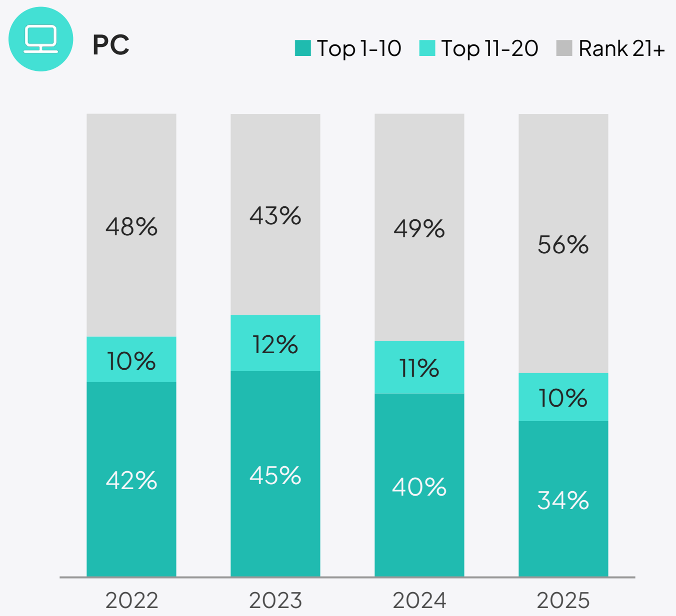
- **Lowest Top 10 concentration**, pointing to broader engagement across major titles
- **Game Pass** continues to distribute playtime beyond the very top hits

Note: Rankings for Battlefield 6 and ARC Raiders are likely understated due to late-year releases
Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

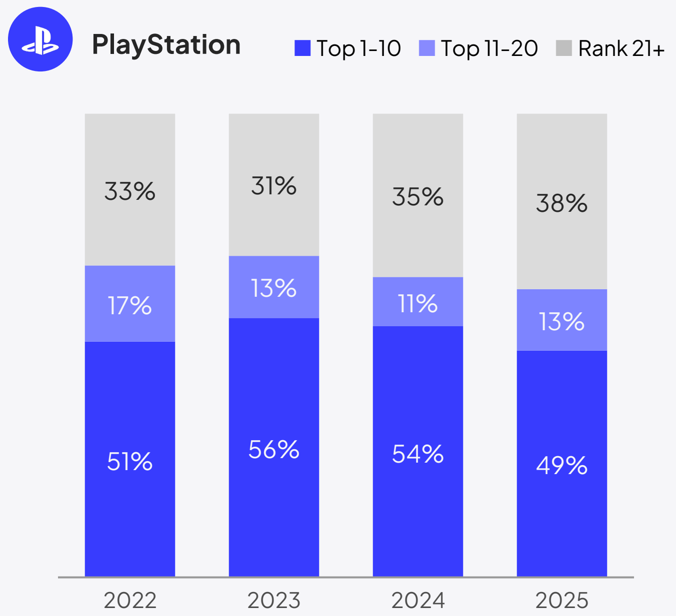
Almost 2/3 of console revenues go to the top 20 games, while over half on PC goes to ranks 21+

Revenue distribution by game ranking tier

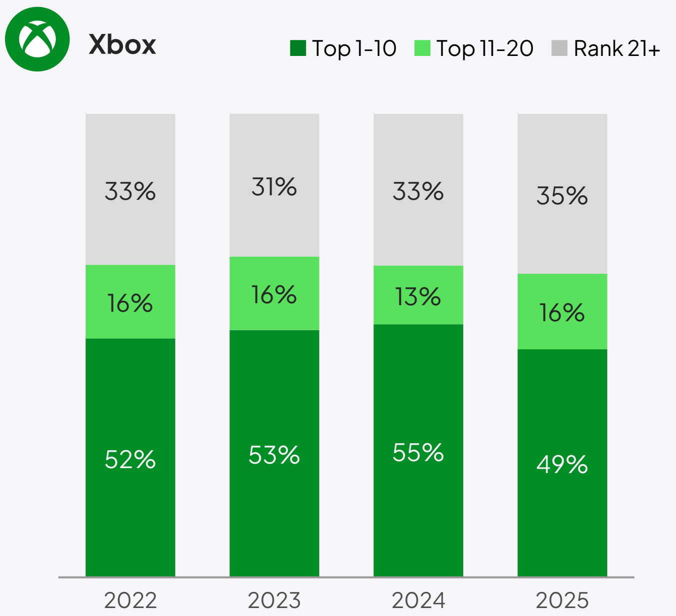
PC, PlayStation, Xbox | 2022-2025 | US, UK, DE, FR, ES, IT



- Top 10 revenue share **declined sharply** 2022-2025
- Suggests stronger performance of long-tail titles (Ranks 21+) and **diversified spending beyond the biggest hits**



- Revenue distribution is **highly consistent with playtime**
- **Highest Top 10 revenue concentration** among all, reinforcing blockbuster-driven monetization



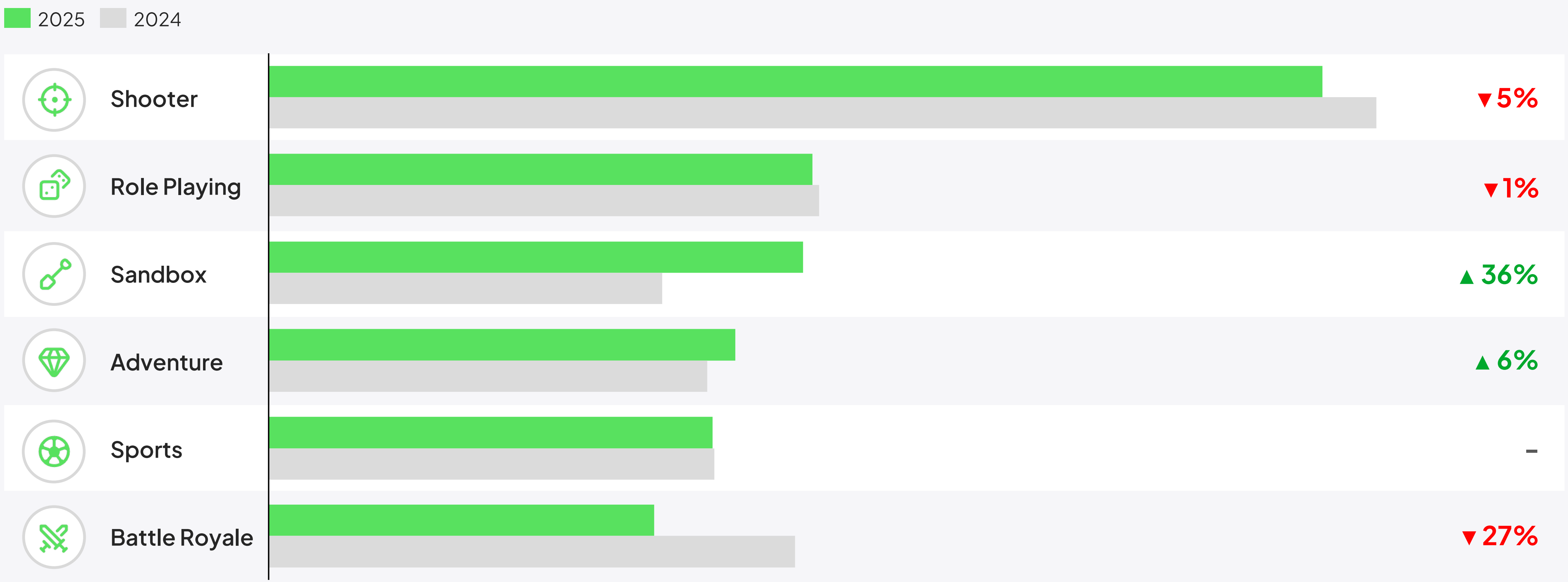
- Consistently **high Top 10 revenue share**, closely mirroring PlayStation
- Despite broader playtime distribution**, spending remains focused on the top games**

Note: Rankings for Battlefield 6 and ARC Raiders are likely understated due to late-year releases
Source: Newzoo Game Performance Monitor | 6 markets (United States, United Kingdom, Germany, France, Spain, and Italy)

Genre data reveals potential AAA weakness as Sandbox momentum builds and Battle Royale shows structural decline

Top genres by playtime

PC, PlayStation, Xbox | 2025 vs. 2024

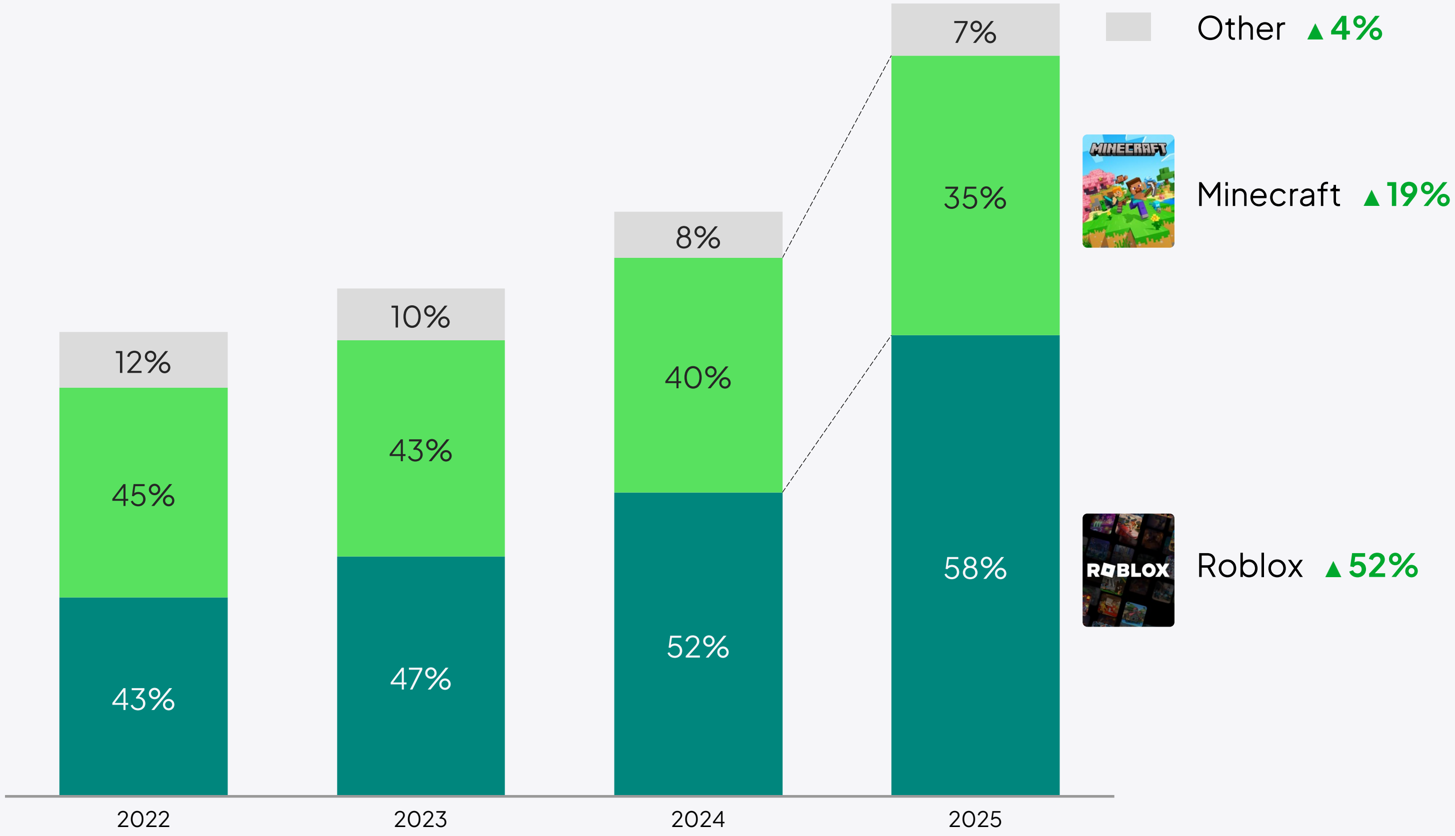


Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

Roblox widens its lead to 58% of Sandbox playtime despite Minecraft's movie-driven uplift

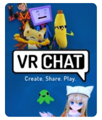
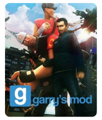
Sandbox playtime distribution

PC, PlayStation, Xbox | 2022-2025



Top other Sandbox games

By playtime share of Sandbox genre

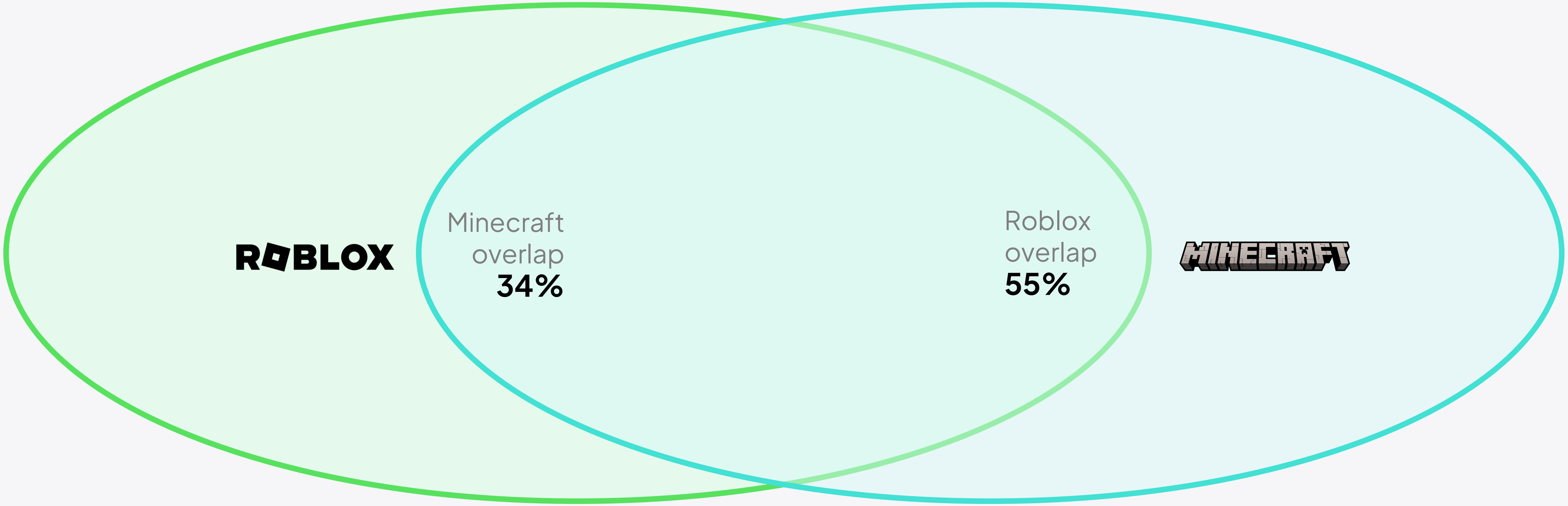
	**Terraria**	1.5%
	**VR Chat**	1.4%
	**Project Zomboid**	1.0%
	**Garry's Mod**	0.8%
	**REC Room**	0.1%

Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

Minecraft and Roblox players heavily overlap with each other…

Minecraft & Roblox's average monthly overlap %

PlayStation, Xbox | January-December 2025

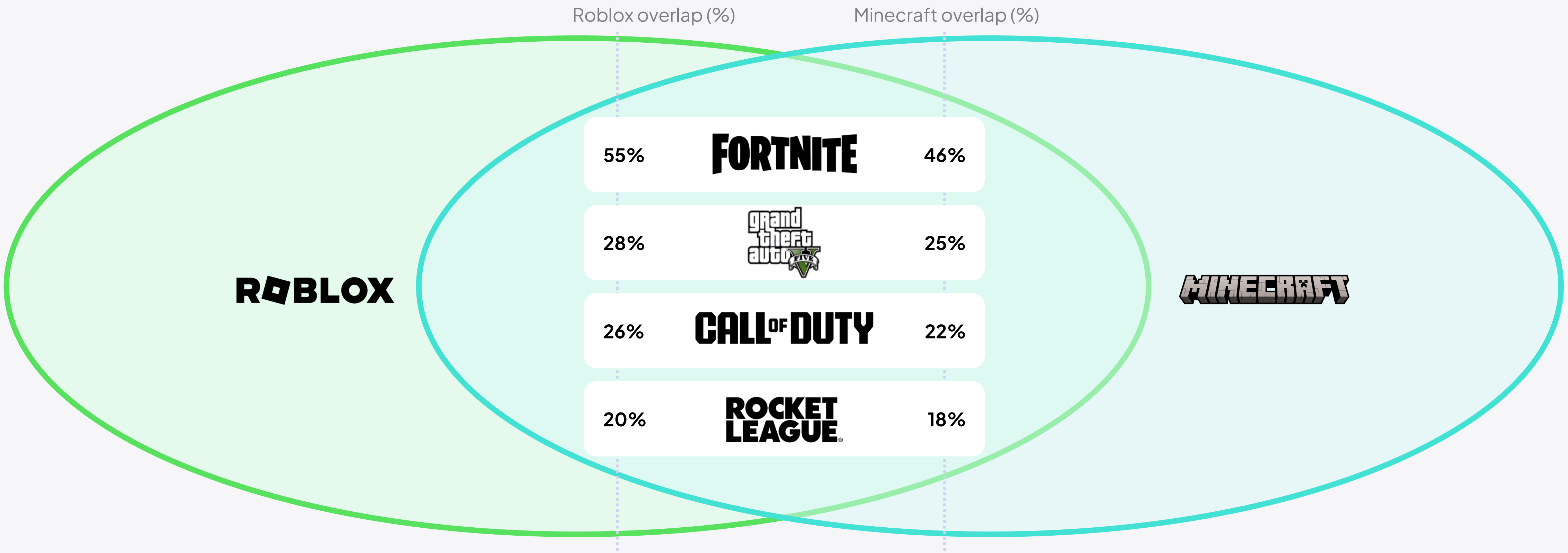


Note: Minecraft & Roblox overlap covers consoles only
Monthly average overlap indicates how much of a title's player base has also played another target tile in any given month
Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

…and with the largest live service games in general

Minecraft & Roblox's average monthly overlap %

PlayStation, Xbox | January-December 2025



Roblox overlap (%)		Minecraft overlap (%)
55%	FORTNITE	46%
28%	Grand Theft Auto V	25%
26%	CALL OF DUTY	22%
20%	ROCKET LEAGUE	18%

Note: Minecraft & Roblox overlap covers consoles only
Monthly average overlap indicates how much of a title's player base has also played another target tile in any given month
Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

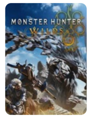
Console overlap reveals Sandbox players under index on AAA; Minecraft away from sports, Roblox away from story-driven titles

Minecraft & Roblox bottom 10 by monthly Overlap Index*

PlayStation, Xbox | January-December 2025, >100k average overlap MAU

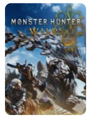
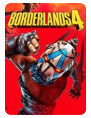
Minecraft

Least likely to play

	EA Sports College Football 26	0.71x
	NBA 2K26	0.72x
	EA SPORTS Madden NFL 26	0.74x
	Assassin's Creed Shadows	0.79x
	Ghost of Yōtei	0.80x
	MLB The Show 25	0.81x
	Monster Hunter Wilds	0.83x
	Clair Obscur: Expedition 33	0.84x
	Borderlands 4	0.87x
	The Outer Worlds 2	0.89x

Roblox

Least likely to play

	Monster Hunter Wilds	0.41x
	Borderlands 4	0.56x
	TES IV: Oblivion Remastered	0.62x
	Assassin's Creed Shadows	0.62x
	Ghost of Yōtei	0.68x
	Destiny 2	0.75x
	Gran Turismo 7	0.76x
	Battlefield 6/REDSEC	0.79x
	Hogwarts Legacy	0.80x
	Alan Wake 2	0.83x

Note: Minecraft & Roblox overlap covers consoles only

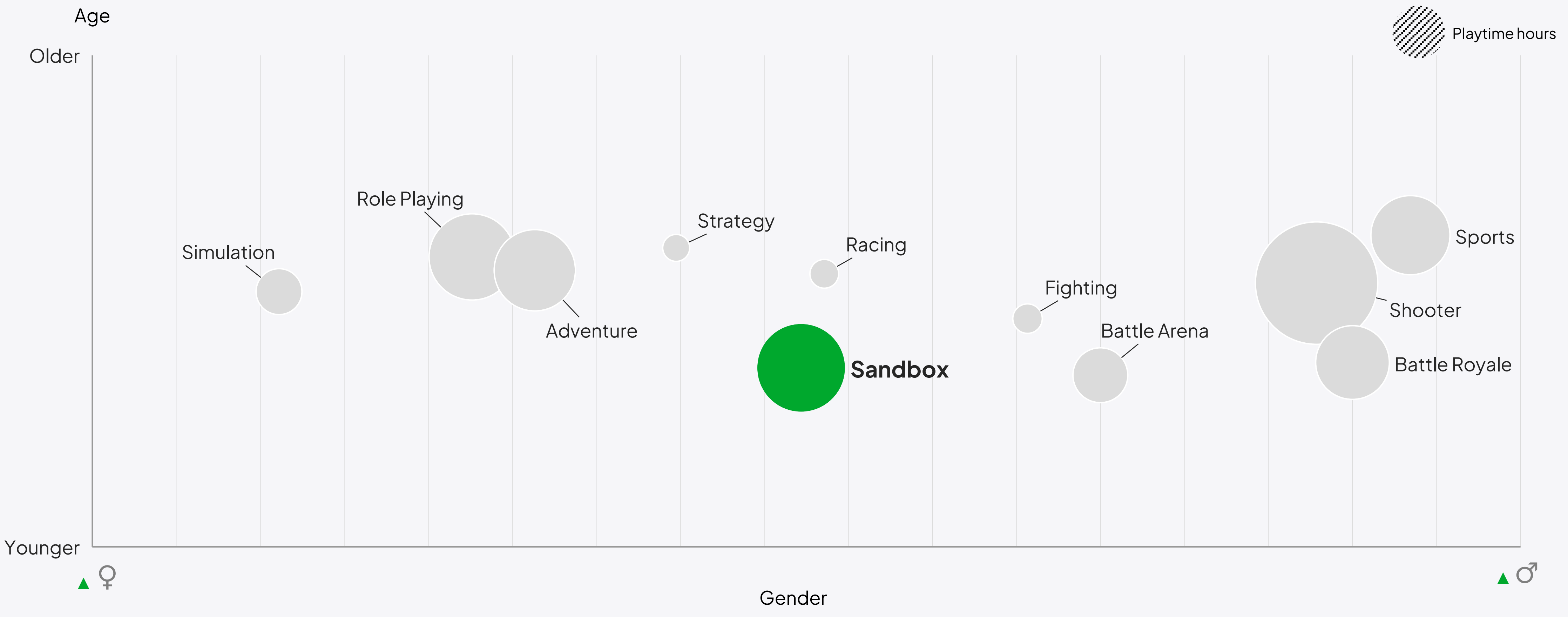
*Overlap Index measures how much more likely the primary game's player base is to play other titles compared to the average player on that platform

Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

Survey data reveals Sandbox as a demographically balanced cohort, skewing younger and slightly male

Genres x socio-demographics x playtime

Base: PC/Console players in the past 6 months

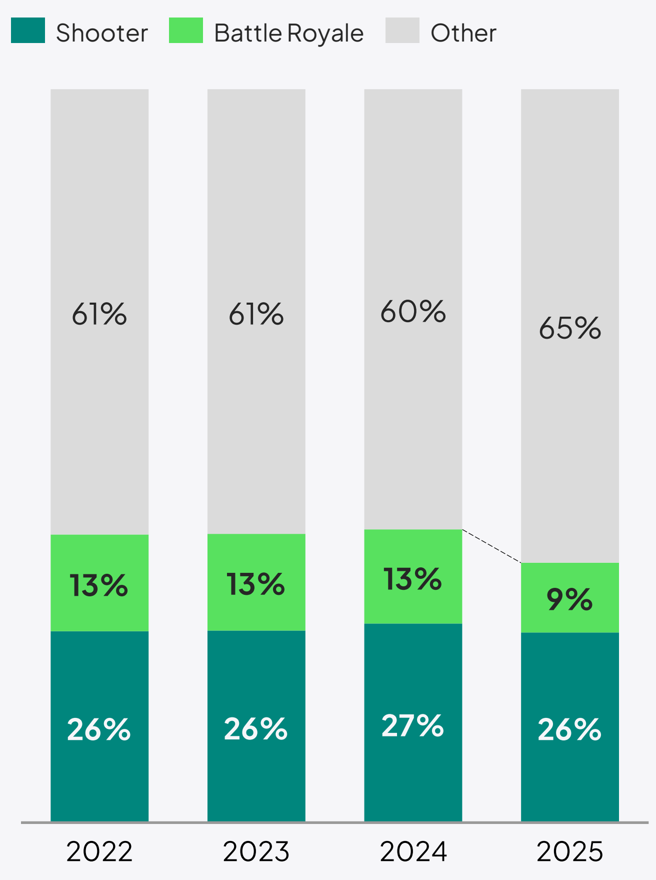


Source: Newzoo Global Gamer Study 2025 | 36 markets

Shooter & Battle Royale's combined share fell 5 pts in 2025 despite Marvel Rivals & Counter-Strike 2's impressive years

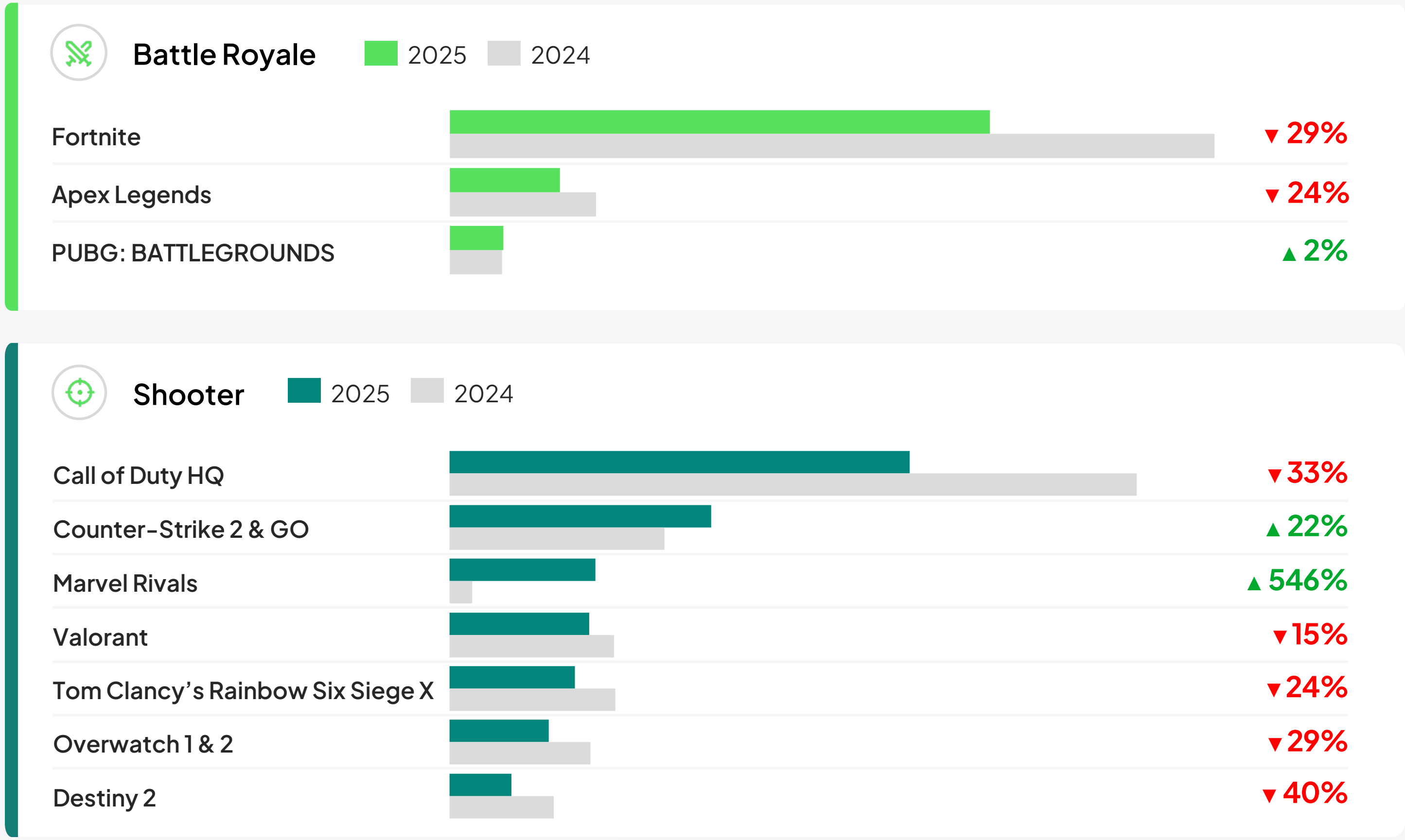
Battle Royale & Shooter playtime distribution

PC, PlayStation, Xbox | 2022-2025



Playtime for top Battle Royale & Shooter titles

PC, PlayStation, Xbox | 2025 vs. 2024

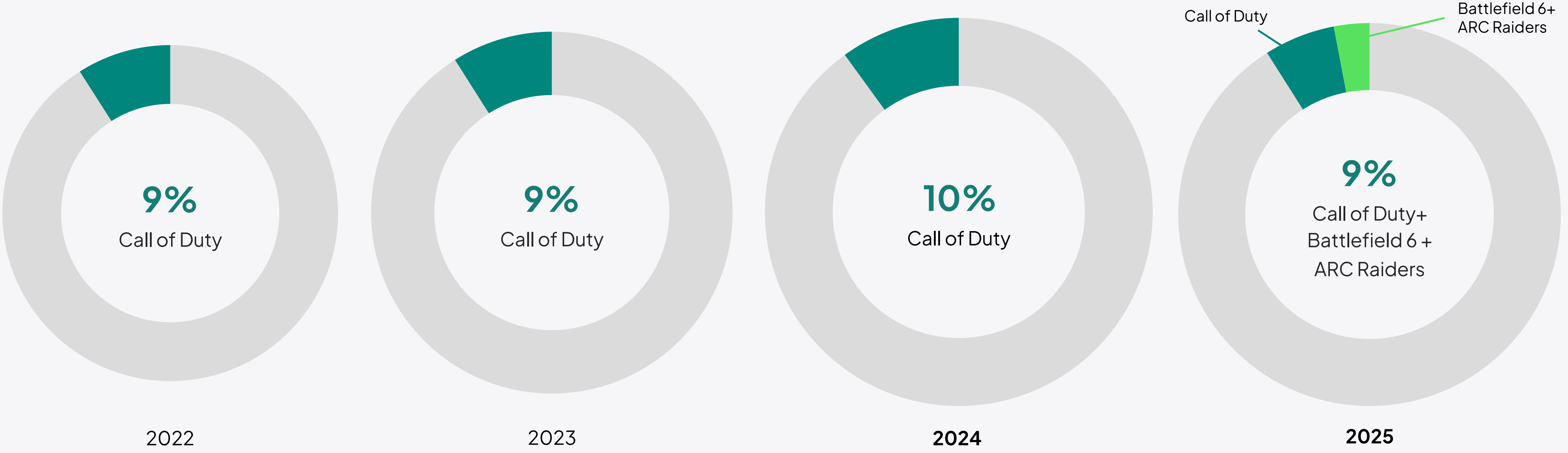


Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

Battlefield and ARC Raiders' strong releases could not offset the rest of the decline in Shooter playtime

All platforms playtime distribution

PC, PlayStation, Xbox | 2022 – 2025



Call of Duty's 2024 playtime exceeded that of **Call of Duty**, **Battlefield 6**, and **ARC Raiders**' combined 2025 playtime

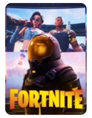
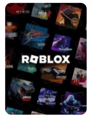
Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

Call of Duty's console audience over-indexes on Sports, and under-indexes on RPG and Adventure

Call of Duty console holiday season overlap & Overlap Index*

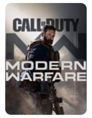
PlayStation, Xbox | December 2025 | >100k overlap MAU

Top overlap %

	Fortnite	26%
	Grand Theft Auto V	20%
	Roblox	15%
	Minecraft	14%
	Battlefield 6/REDSEC	13%

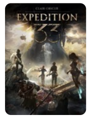
Top Overlap Index

Most likely to play

	Call of Duty: Modern Warfare/Warzone Caldera	2.43x
	Call of Duty: Black Ops Cold War	2.12x
	Call of Duty: Black Ops 4	1.74x
	EA Sports Madden NFL 25	1.58x
	Undisputed	1.53x

Bottom Overlap Index

Least likely to play

	HELLDIVERS 2	0.63x
	Elden Ring Nightreign	0.68x
	Clair Obscur: Expedition 33	0.70x
	Elden Ring	0.71x
	Borderlands 4	0.71x

Call of Duty HQ overlap covers consoles only

*Overlap Index measures how much more likely the primary game's player base is to play other titles compared to the average player on that platform

Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

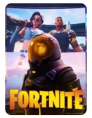
Battlefield's audience is more likely to play a diverse assortment of shooters, and slightly under-indexes on annual sports

Battlefield 6/REDSEC holiday season overlap & Overlap Index*

PC, PlayStation, Xbox | December 2025 | >100k overlap MAU

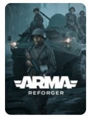
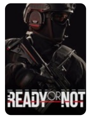
BATTLEFIELD 6

Top overlap %

	Counter-Strike 2	🖥	29%
	Fortnite	ⓟ ⓧ	27%
	Call of Duty HQ	ⓟ ⓧ	18%
	ARC Raiders	🖥	17%
	Grand Theft Auto V	🖥 ⓟ ⓧ	16%

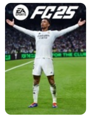
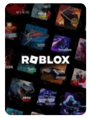
Top Overlap Index

Most likely to play

	Arma Reforger	🖥 ⓟ ⓧ	2.95x
	Hell Let Loose	🖥 ⓟ ⓧ	2.92x
	Ready or Not	🖥 ⓟ ⓧ	2.55x
	Insurgency: Sandstorm	🖥 ⓟ ⓧ	2.49x
	Warhammer 40K: Space Marine 2	🖥 ⓟ ⓧ	2.35x

Bottom Overlap Index

Least likely to play

	Dota 2	🖥	0.49x
	EA Sports FC 25	🖥 ⓟ ⓧ	0.64x
	Roblox	ⓟ ⓧ	0.68x
	Brawlhalla	🖥 ⓟ ⓧ	0.74x
	EA Sports Madden NFL 25	ⓟ ⓧ	0.75x

*Overlap Index measures how much more likely the primary game's player base is to play other titles compared to the average player on that platform

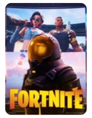
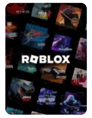
Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

ARC Raiders’ audience prefers multiplayer & co-op role-playing titles, and less likely to prefer black hole live service games

ARC Raiders holiday season overlap & Overlap Index*

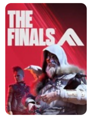
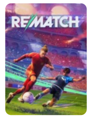
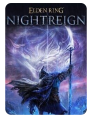
PC, PlayStation, Xbox | December 2025 | >100k overlap MAU

Top overlap %

	Fortnite	🎮 ⓧ	30%
	Counter-Strike 2	🖥	26%
	Battlefield 6/REDSEC	🖥 🎮 ⓧ	23%
	Roblox	🎮 ⓧ	15%
	Minecraft	🎮 ⓧ	15%

Top Overlap Index

Most likely to play

	THE FINALS	🖥 🎮 ⓧ	5.35x
	Hunt: Showdown 1986	🖥 🎮 ⓧ	3.04x
	REMATCH	🖥 🎮 ⓧ	2.72x
	HELLDIVERS 2	🖥 🎮 ⓧ	2.63x
	Elden Ring Nightreign	🖥 🎮 ⓧ	2.60x

Bottom Overlap Index

Least likely to play

	EA Sports FC 26	🖥 🎮 ⓧ	0.49x
	Dota 2	🖥	0.66x
	Grand Theft Auto V	🖥 🎮 ⓧ	0.74x
	Counter-Strike 2	🖥	0.81x
	Roblox	🎮 ⓧ	0.83x

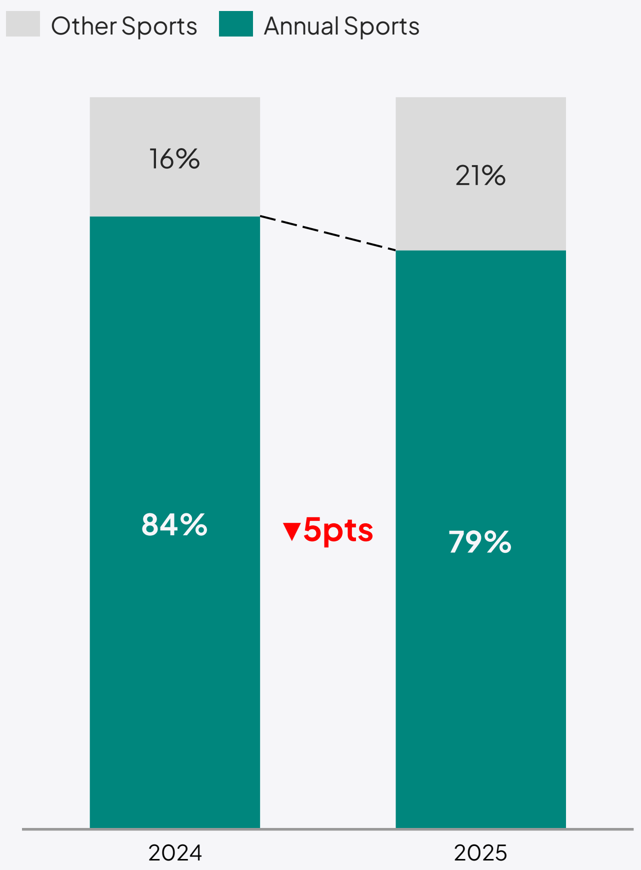
*Overlap Index measures how much more likely the primary game’s player base is to play other titles compared to the average player on that platform

Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

Annual franchises' share of the Sports genre dropped 5pts with some playtime diversifying into Rocket League and new releases

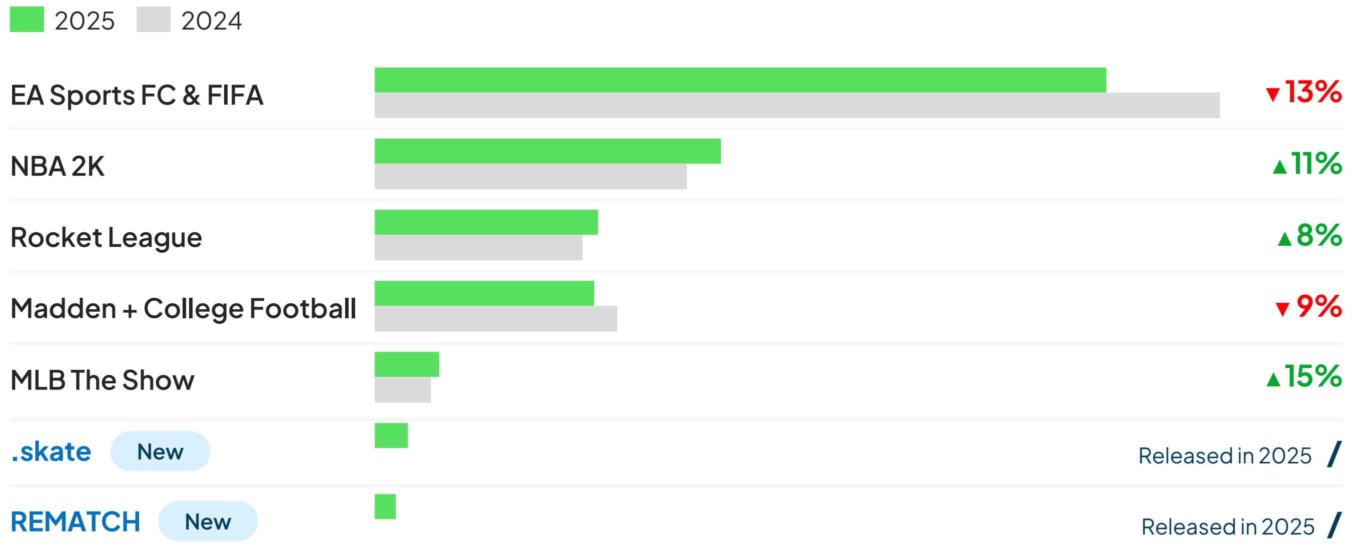
Sports playtime distribution

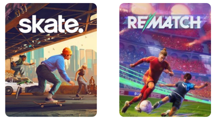
PC, PlayStation, Xbox | 2024-2025



Playtime for top Sports titles

PC, PlayStation, Xbox | 2025 vs. 2024





skate. and **REMATCH** combined accounted for 3% of Sports genre's playtime across all platforms

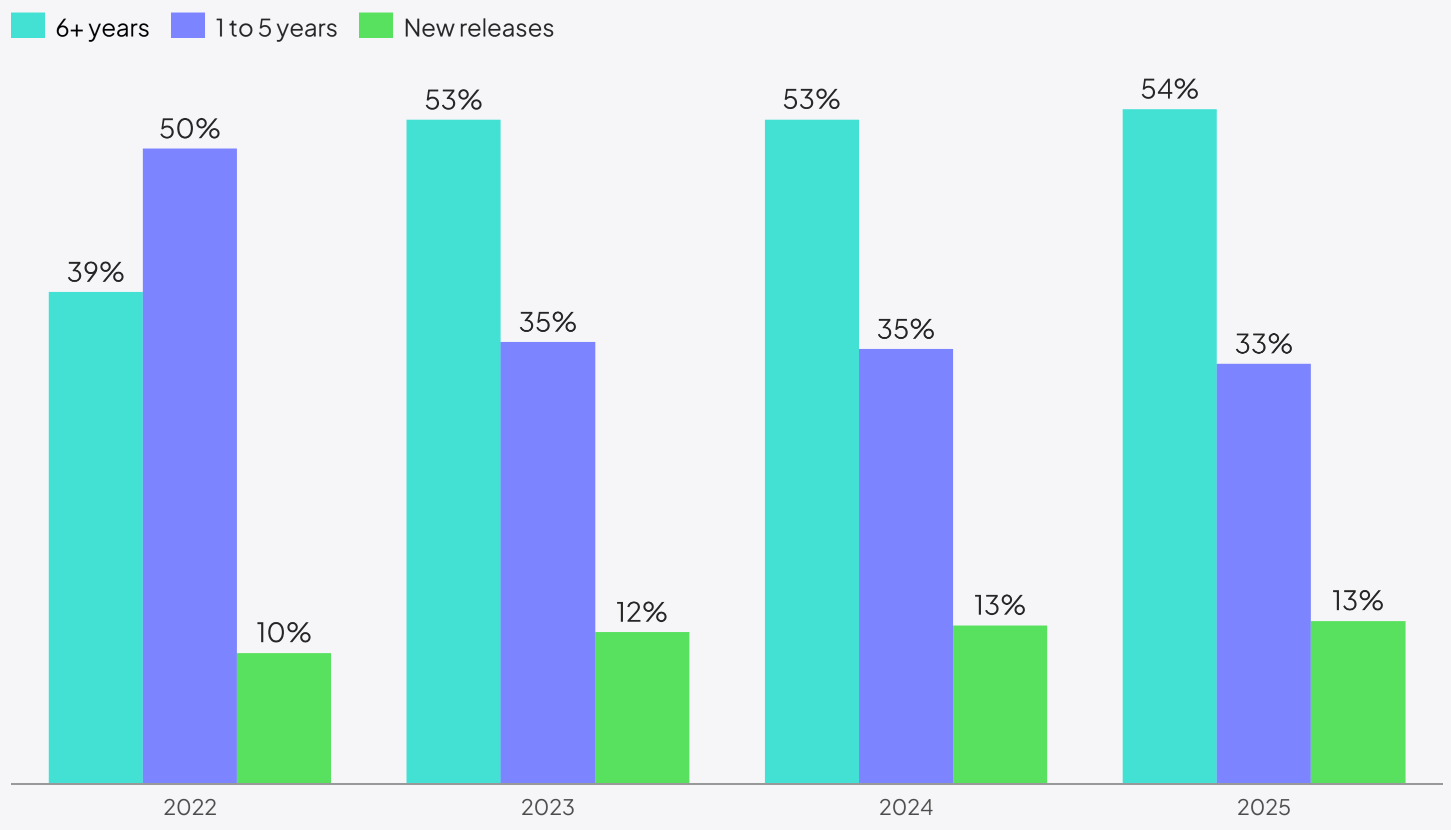
Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

What share of total playtime is available to new releases?

For all platforms combined, new release share of playtime remained stable throughout 2025

% of yearly total hours by age of title

PC, PlayStation, Xbox | 2022-2025



Top titles by playtime share

PC, PlayStation, Xbox | 2025

6+ years

	**Fortnite**	7.1%
	**Roblox***	5.9%
	**Minecraft**	4.7%

New releases

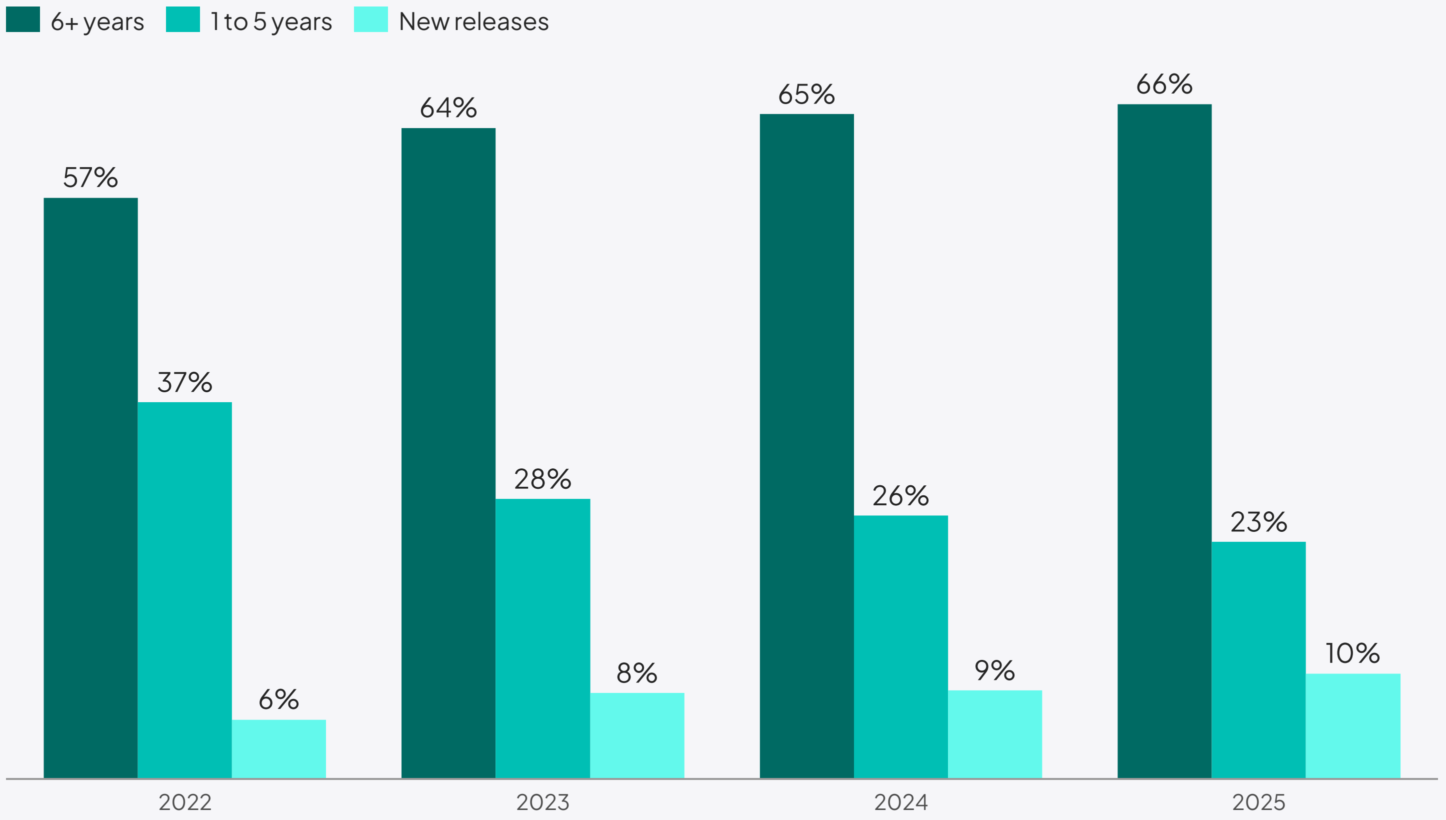
	**EA Sports FC26**	1.1%
	**Battlefield 6/REDSEC**	1.1%
	**Escape from Tarkov****	0.8%

*Roblox's staggered PlayStation release date means that it is split between two buckets, it remains the largest game by playtime; **Escape From Tarkov was launched from Early Access
Note: Call of Duty HQ is release date-adjusted
Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

On PC, new release playtime grew slightly, and Sandbox growth shifted additional playtime to the 6+ year group

% of yearly total hours by age of title

2022-2025



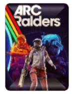
Top titles by playtime share

PC | 2025

6+ years

	Roblox	9.7%
	Counter-Strike 2	7.0%
	League of Legends	6.9%

New releases

	Escape from Tarkov*	1.7%
	Battlefield 6/REDSEC	0.8%
	ARC Raiders	0.6%

*Escape From Tarkov was launched from Early Access

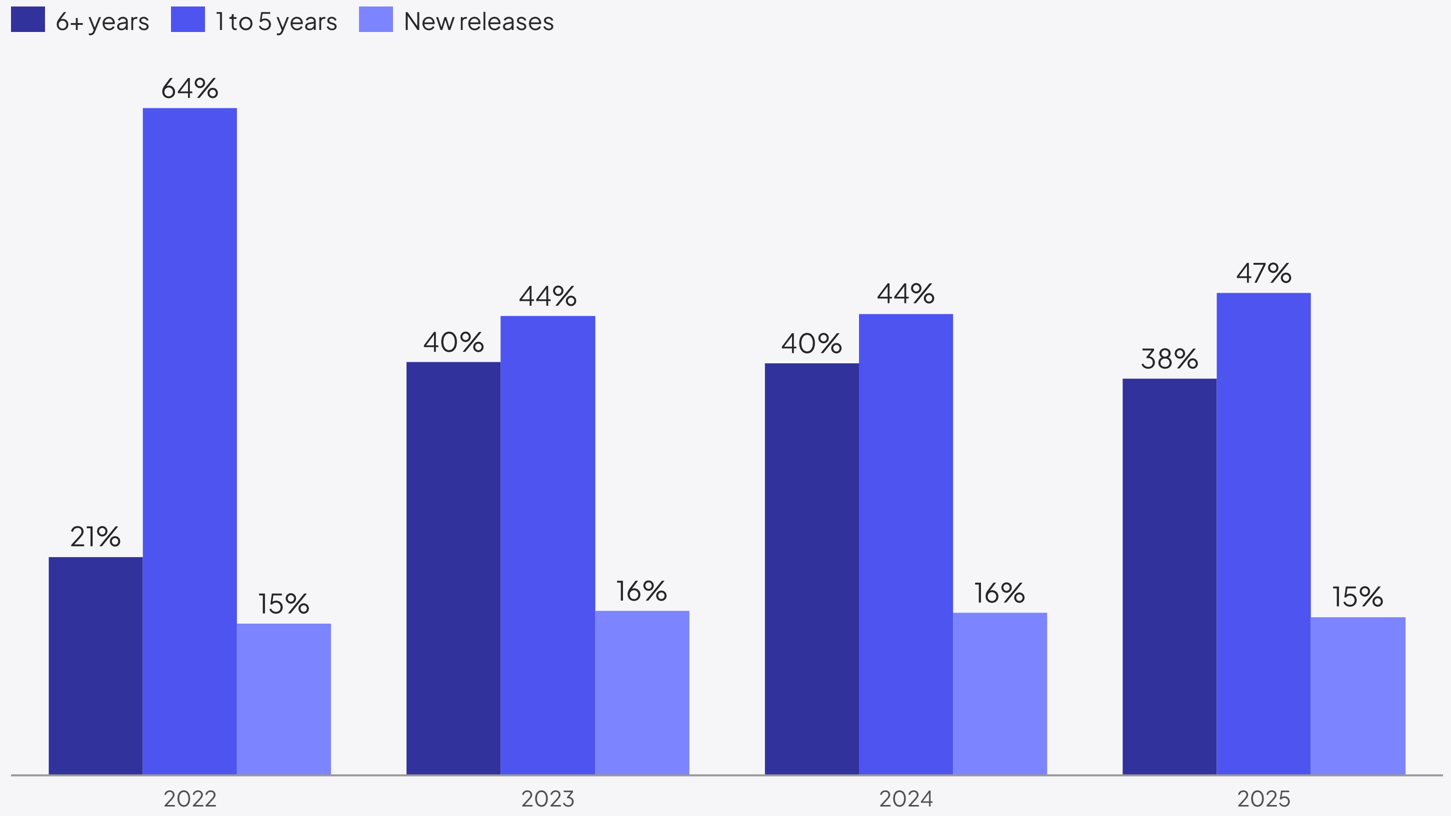
Note: Call of Duty HQ is release date-adjusted

Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

PlayStation saw a small boost in the 1–5 years group thanks to Roblox's striking growth

% of yearly total hours by age of title

2022-2025



Top titles by playtime share

PlayStation | 2025

6+ years

	**Fortnite**	**10.4%**
	**Grand Theft Auto V**	**4.3%**
	**Minecraft**	**2.5%**

New releases

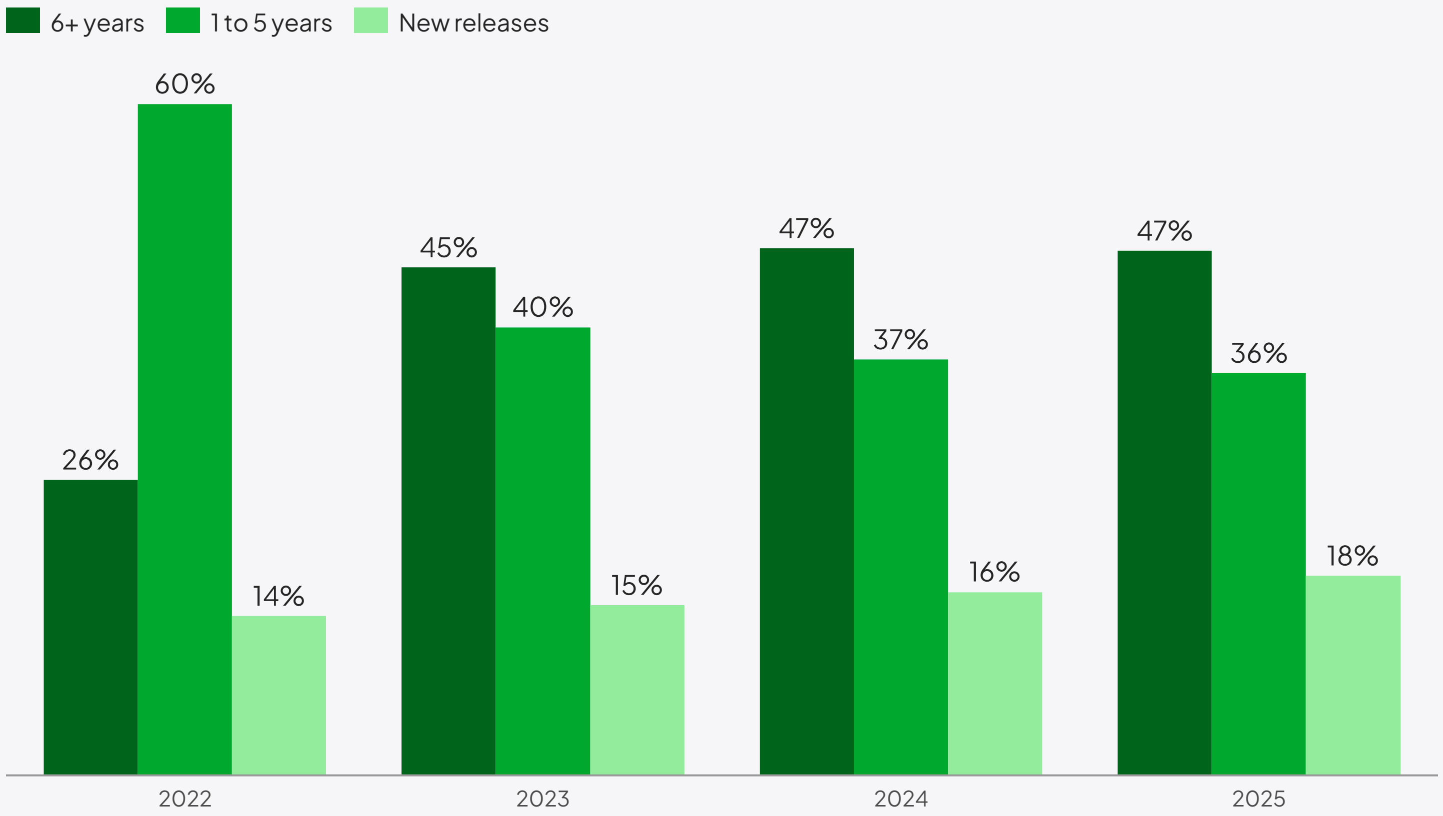
	**EA Sports FC 26**	**2.5%**
	**Monster Hunter Wilds**	**1.3%**
	**Call of Duty HQ**	**1.1%**

Note: Call of Duty HQ is release date-adjusted
Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

Xbox new release playtime grows through Day One Game Pass effects

% of yearly total hours by age of title

2022-2025



Top titles by playtime share

Xbox | 2025

6+ years

Fortnite	**8.4%**
Roblox	**6.5%**
Minecraft	**4.1%**

New releases

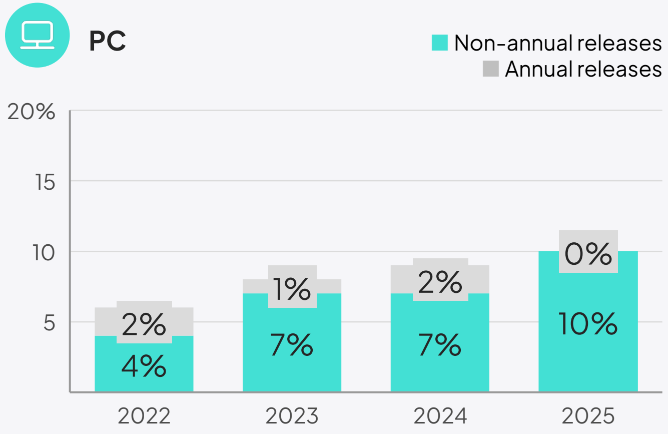
Battlefield 6/REDSEC	**1.7%**
NBA 2K26	**1.6%**
Call of Duty HQ	**1.4%**

Note: Call of Duty HQ is release date-adjusted
Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

Non-annual franchises' share of new release playtime grew to 10% on PC in 2025 and grew significantly on consoles

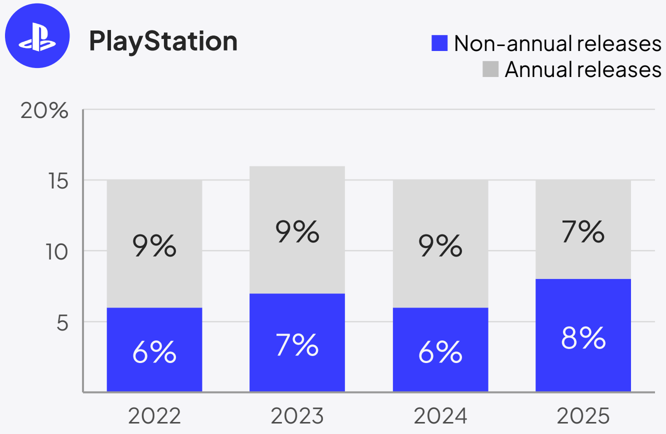
Playtime share of new releases by franchise type (annual vs. non-annual)

2022-2025 new releases



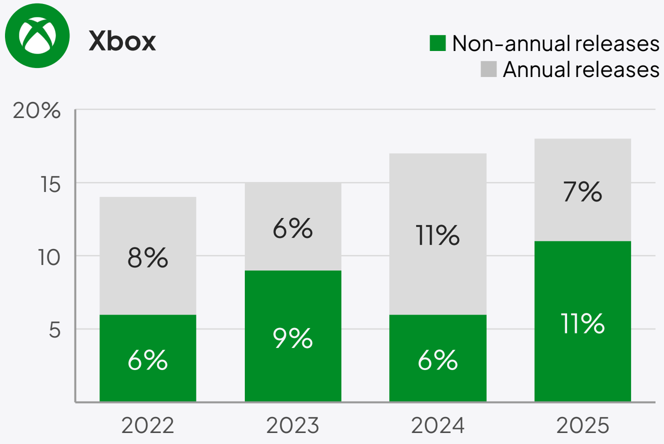
1.	Escape from Tarkov*	1.7%	November
2.	Battlefield 6/REDSEC	0.8%	October
3.	ARC Raiders	0.7%	October
4.	Monster Hunter Wilds	0.5%	February
5.	R.E.P.O.	0.4%	February

Top non-annual new releases in 2025
by % of total PC playtime



Top non-annual new releases in 2025
by % of total PlayStation playtime

1.	Monster Hunter Wilds	1.3%	February
2.	Battlefield 6/REDSEC	1.1%	October
3.	Elden Ring Nightreign	0.6%	May
4.	ARC Raiders	0.5%	October
5.	Ghost of Yōtei	0.4%	October



Top non-annual new releases in 2025
by % of total Xbox playtime

1.	Battlefield 6/REDSEC	1.7%	October
2.	ARC Raiders	0.8%	October
3.	Helldivers 2	0.7%	August
4.	Borderlands 4	0.6%	September
5.	Oblivion Remastered	0.6%	April

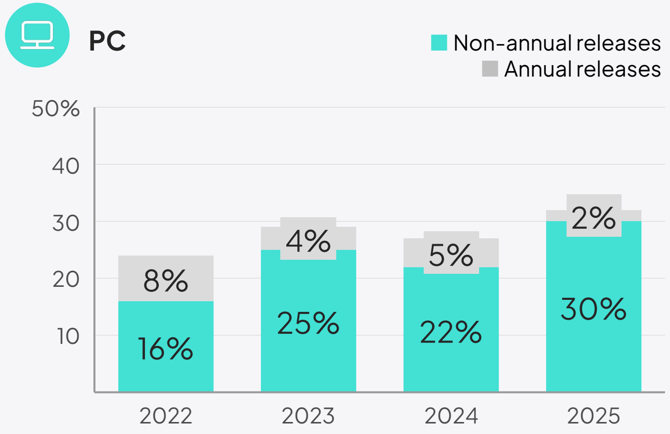
*Escape From Tarkov was launched from Early Access
Note: Call of Duty HQ is release date-adjusted
Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

The effect is even stronger for new release revenues

Revenue share of new releases by franchise type (annual vs. non-annual)

2022-2025 new releases | US, UK, DE, FR, ES, IT

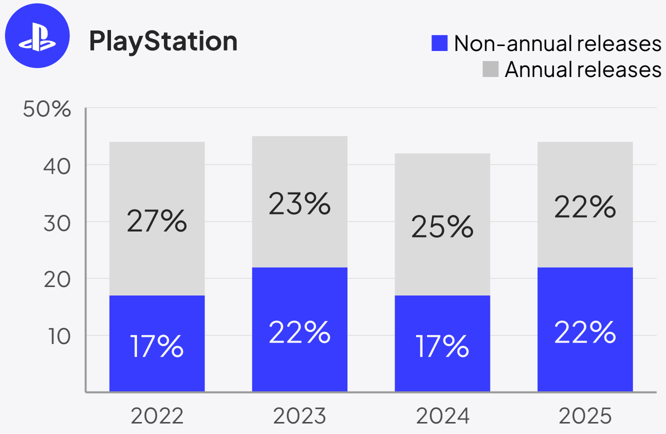
PC



Top non-annual new releases in 2025
by % of total PC revenue

1.	Battlefield 6/REDSEC	3.9%	October
2.	ARC Raiders	2.0%	October
3.	Schedule I	1.6%	March
4.	Monster Hunter Wilds	1.1%	February
5.	Borderlands 4	1.1%	September

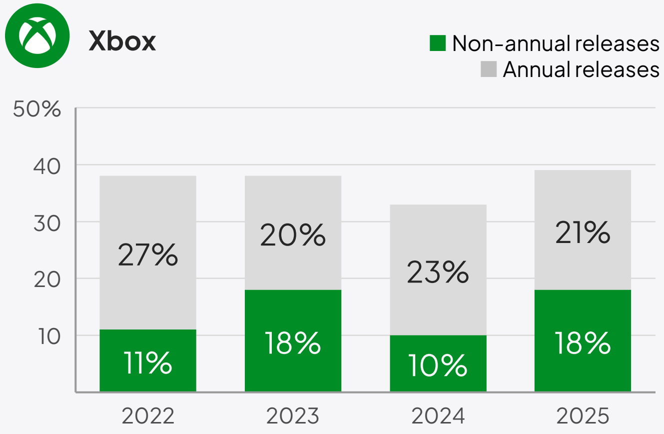
PlayStation



Top non-annual new releases in 2025
by % of total PlayStation revenue

1.	Battlefield 6/REDSEC	2.7%	October
2.	Assassin's Creed Shadows	1.6%	March
3.	Ghost of Yōtei	1.5%	October
4.	Forza Horizon 5	1.5%	April
5.	ARC Raiders	1.0%	October

Xbox



Top non-annual new releases in 2025
by % of total Xbox revenue

1.	Battlefield 6/REDSEC	3.7%	October
2.	HELLDIVERS 2	1.6%	August
3.	ARC Raiders	1.4%	October
4.	Assassin's Creed Shadows	1.3%	March
5.	Borderlands 4	1.2%	September

Note: Call of Duty HQ is release date-adjusted
Source: Newzoo Game Performance Monitor | 6 markets (United States, United Kingdom, Germany, France, Spain, and Italy)

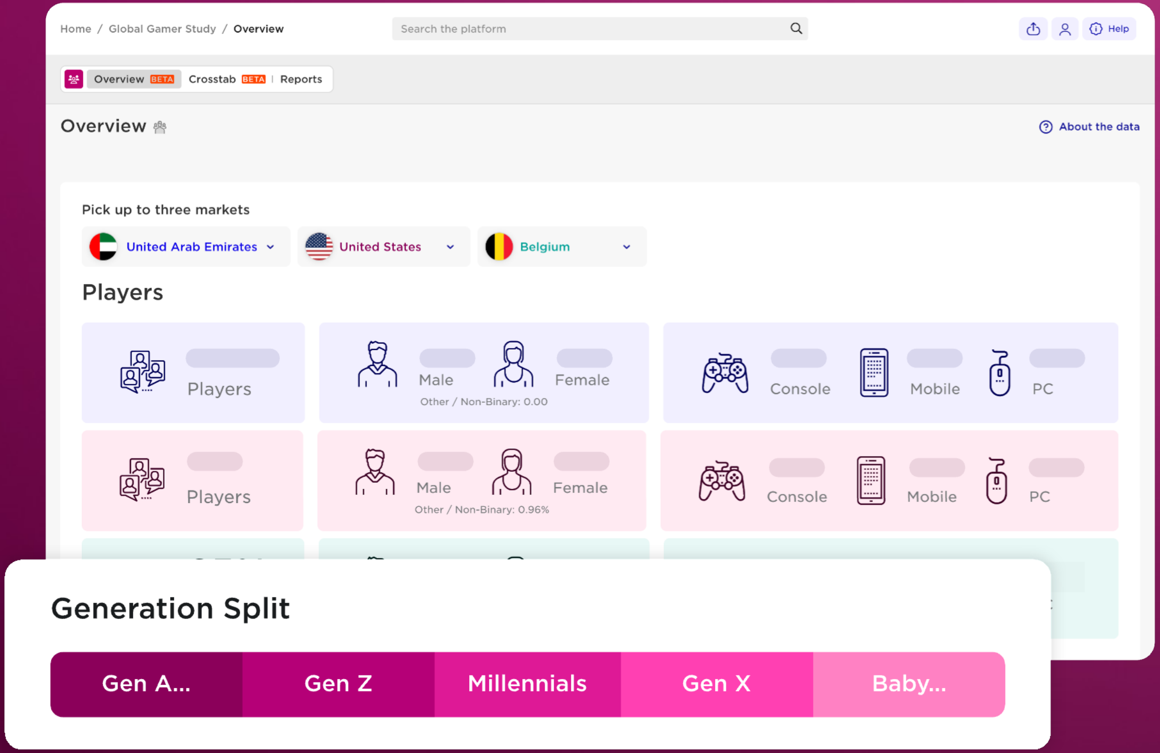
Global Gamer Study

Understand which players are fueling growth and which are disengaging

Access the world's largest gamer survey, profiling players annually across 36 markets

- ✓ Full demographic and psychographic profiles of gamers across 36 markets
- ✓ Gaming, spending and viewing behavior and attitudes per platform
- ✓ Game franchises played, attitudes and purchase funnel
- ✓ Motivations to play games and gamer personas

Find out more



Pick up to three markets: United Arab Emirates, United States, Belgium

Other / Non-Binary: 0.00

Other / Non-Binary: 0.96%

Attention & value allocation

Summary

Stabilizing engagement has changed the playtime metagame from addition to reallocation. While the top 20 titles still take up >50% of playtime, this share is shrinking on all platforms and most notably on PC .

The growing Sandbox share, driven by Roblox, has not fully absorbed the hours lost in AAA-heavy genres (e.g., Shooter, Battle Royale).

1. Global overall playtime is flat, masking platform divergence

PC’s growth (+3%) offset contractions on PlayStation (–4%) and Xbox (–3%).

Roblox became the #1 most played franchise, overtaking Fortnite & Call of Duty.

2. Sandbox playtime grew by over 1/3

Sandbox playtime expanded structurally (+36%), gaining share from Battle Royale (-27%) and Shooter (-5%) .

Sandbox audiences, by title overlap, are less likely to play AAA story-led single-player RPG and Adventure titles.

3. Playtime share available to new releases remained stable

This indicates substitution of engagement rather than incremental audience expansion.

Notably, non-sports breakout hit audiences are less likely to overlap with annualized sports franchises

3. Market concentration

What happens if you are not a top-20 game?

Market concentration

What happens if you are not a top-20 game?

Overview

In this section, we look at market concentration and playtime dynamics for games outside the Top 20, examining just how viable and enduring the long tail remains in 2025. We break down how playtime has been distributed from 2022 to 2025, how different genres and business models perform among long-tail titles, and what platform-specific dynamics shape the success of games beyond the Top 20. Ultimately, we tackle the question that matters most: what does it take for a non-top-tier game to survive?

Tianyi Gu
Manager Market Analyst

Core definitions & key notes

Yearly Top 20 rankings
Rankings are calculated on an annual basis; late-2025 launches (e.g., Battlefield 6/REDSEC, ARC Raiders) are likely understated in these rankings, with their playtime impact not fully captured

Long tail
Defined as all games ranking beyond the Top 20 on each individual platform (PC, PlayStation, Xbox)

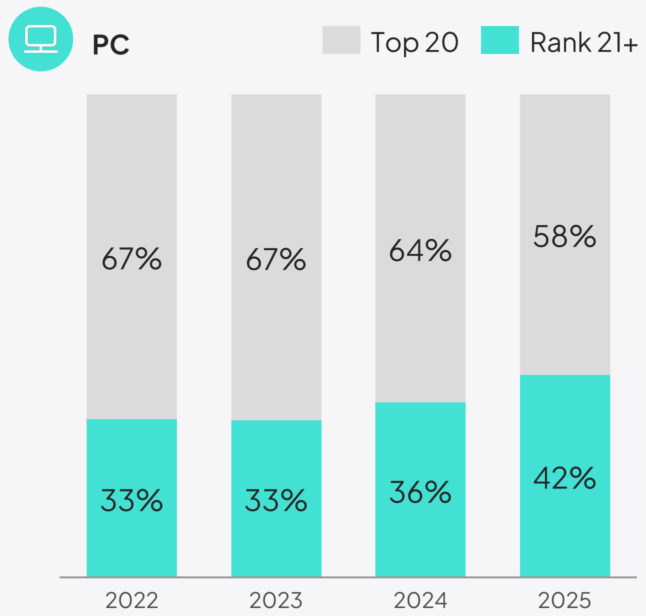
Playtime percentages
All playtime share values in this section represent a game’s playtime share of its respective platform’s total playtime in 2025, providing a standardized lens for comparing performance across titles, tiers, and platforms

2026 PC & Console Gaming Report

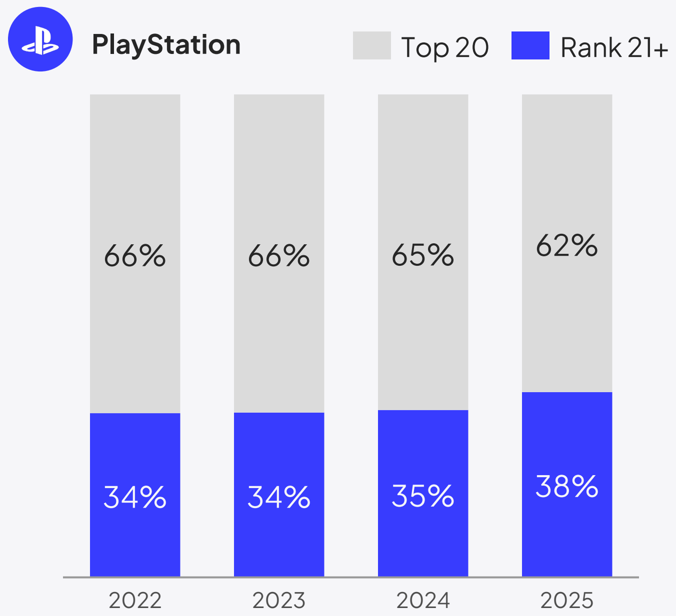
Beyond the Top 20: how deep is each platform's market?

Playtime distribution by game ranking tier

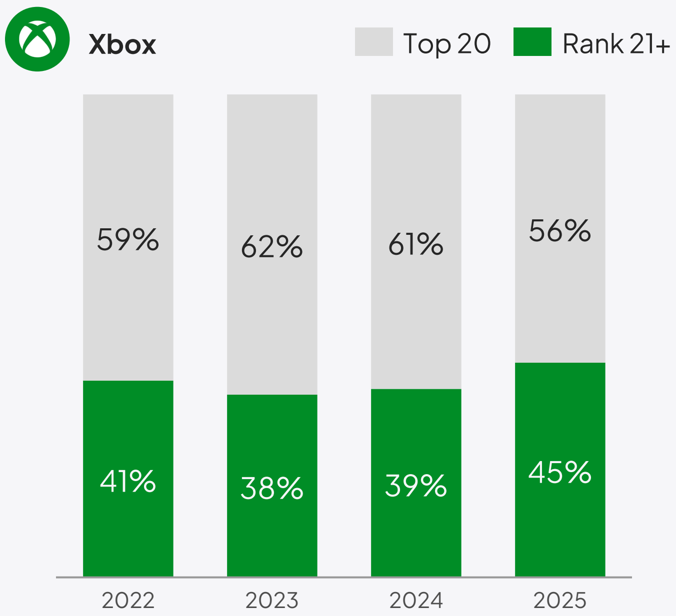
PC, PlayStation, Xbox | 2022-2025



- The market is **disaggregating;** growth comes from games outside the Top 20
- Engagement depth is expanding, not just redistributing



- Highly **hit-led**, with engagement concentrated on Top 20 and annual franchises
- The long tail is growing, but still **competes with recurring blockbuster cycles**



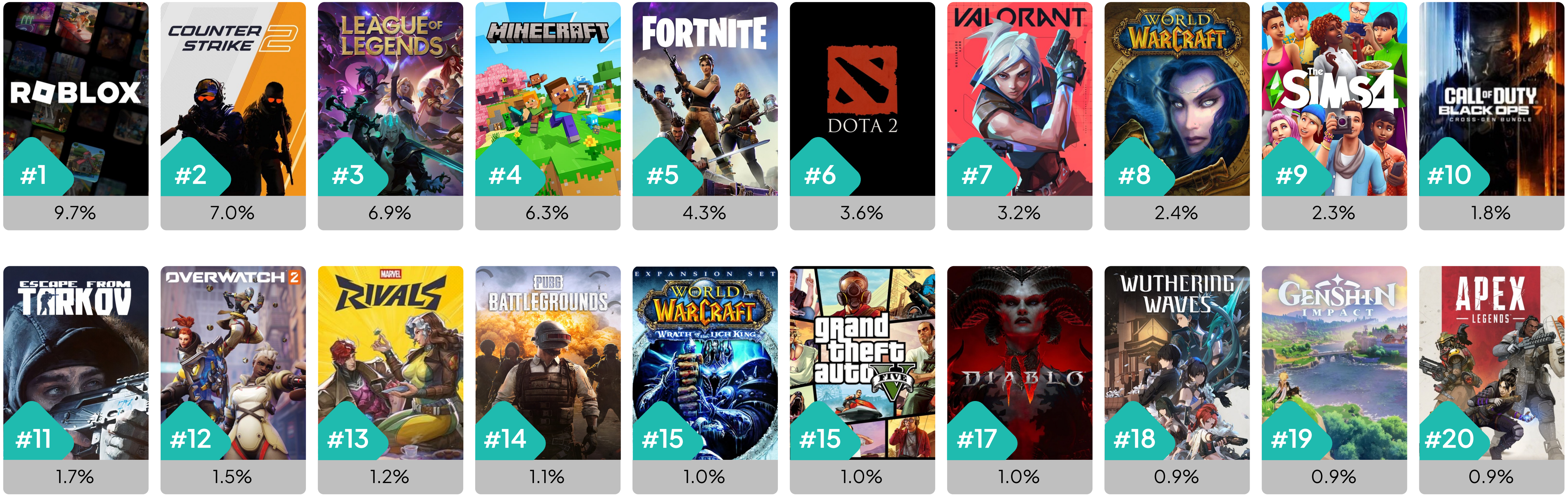
- Engagement is spreading beyond the Top 20, **driven by subscription discovery**
- Growth in the long tail reflects **redistribution of total platform playtime**, rather than major expansion

Note: Rankings for Battlefield 6 and ARC Raiders are likely understated due to late-year releases
Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

Marvel Rivals and Wuthering Waves break into PC's Top 20 for the first time, but overall playtime remains highly concentrated on evergreen titles

Top 20 PC games by playtime share

2025



#1	9.7%
#2	7.0%
#3	6.9%
#4	6.3%
#5	4.3%
#6	3.6%
#7	3.2%
#8	2.4%
#9	2.3%
#10	1.8%
#11	1.7%
#12	1.5%
#13	1.2%
#14	1.1%
#15	1.0%
#15	1.0%
#17	1.0%
#18	0.9%
#19	0.9%
#20	0.9%

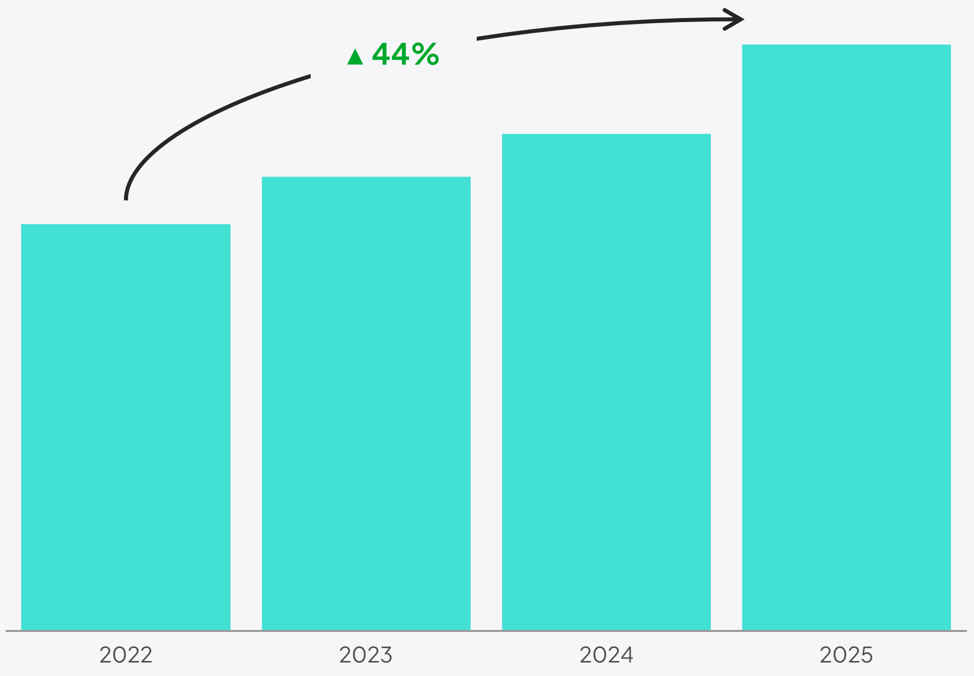
Note: Rankings for Battlefield 6 and ARC Raiders are likely understated due to late-year releases
Source: Newzoo Game Performance Monitor | 37 markets (excl. China & India)

PC playtime growth is coming from a rapidly expanding long tail

Playtime beyond the Top 20

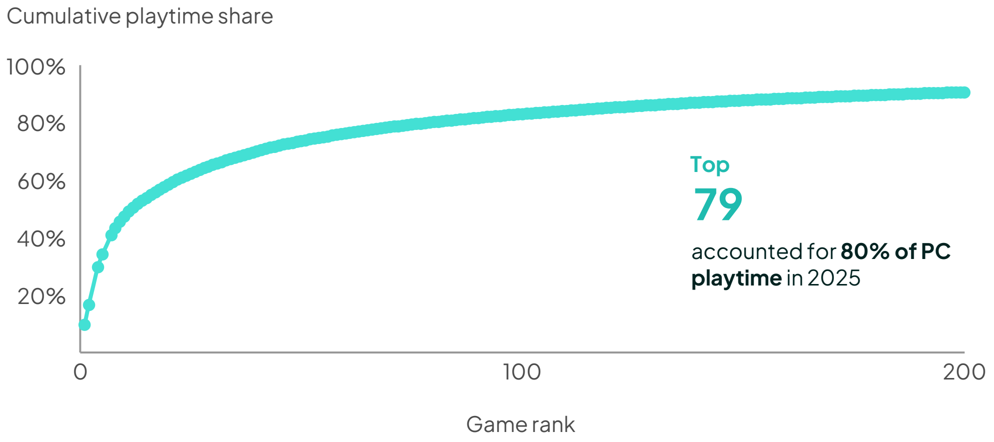
PC | 2022-2025

PC total	▲14%
Top 20	▼1%
Rank 21+	▲44%



Cumulative playtime share for games ranked 1–200

PC | 2025



Top **79** accounted for **80% of PC playtime** in 2025

Top new releases in 2025 among Rank 21+

by % of total PC playtime

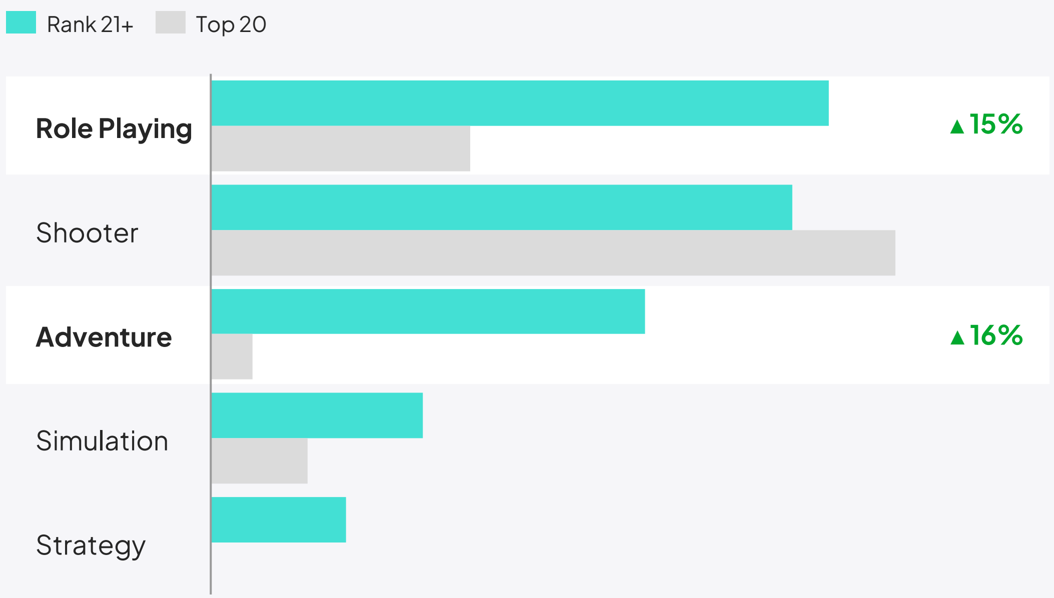
#22	**Battlefield 6/REDSEC**	0.8%
#26	**ARC Raiders**	0.6%
#33	**Monster Hunter Wilds**	0.5%
#39	**R.E.P.O.**	0.5%
#50	**Elden Ring Nightreign**	0.3%

Note: Rankings for Battlefield 6 and ARC Raiders are likely understated due to late-year releases
Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

PC long-tail success comes from premium games with sustained engagement over time

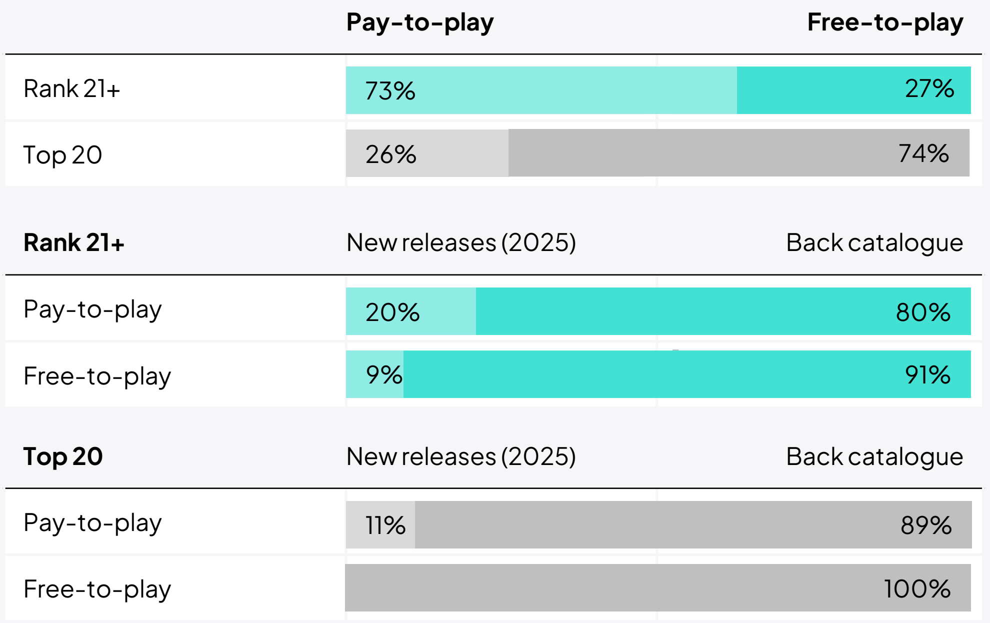
Genre share by playtime: Rank 21+ vs. Top 20

PC | 2025



Business model & game lifecycle: Rank 21+ vs. Top 20

PC | 2025



	Pay-to-play	Free-to-play
Rank 21+	73%	27%
Top 20	26%	74%
Rank 21+	New releases (2025)	Back catalogue
Pay-to-play	20%	80%
Free-to-play	9%	91%
Top 20	New releases (2025)	Back catalogue
Pay-to-play	11%	89%
Free-to-play		100%

- Rank 21+ games **over-index in RPG and Adventure**, where long-term progression drives retention
- **Shooter** share beyond the Top 20 is likely overstated by partial-year impact from Battlefield 6 and ARC Raiders; however, even excluding these two titles, Shooter share would still be meaningful

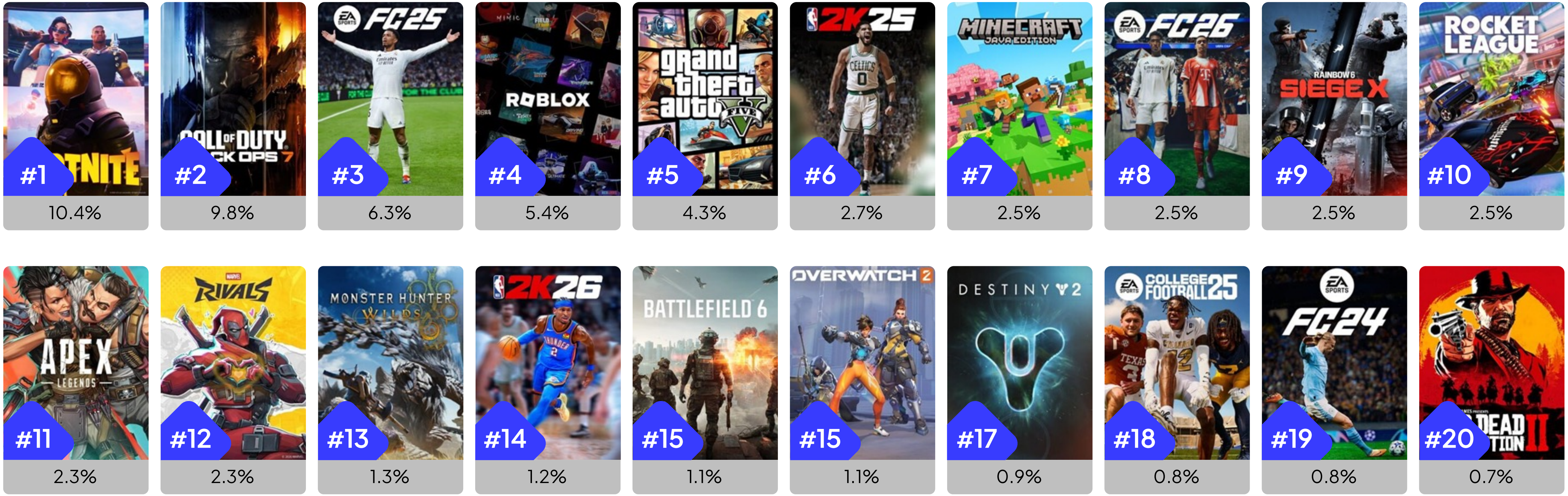
- Games outside the Top 20 skew more toward **premium titles with sustained engagement**
- Across models, long-tail success depends **more on longevity than new releases**, but to a lesser extent than the Top 20, particularly among F2P titles

Note: Call of Duty is grouped into the Pay-to-Play category
Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

Marvel Rivals, Monster Hunter Wilds, and Battlefield 6 are the newcomers to PlayStation's Top 20—all backed by major IP

Top 20 PlayStation games by playtime share

2025



#1	10.4%
#2	9.8%
#3	6.3%
#4	5.4%
#5	4.3%
#6	2.7%
#7	2.5%
#8	2.5%
#9	2.5%
#10	2.5%
#11	2.3%
#12	2.3%
#13	1.3%
#14	1.2%
#15	1.1%
#15	1.1%
#17	0.9%
#18	0.8%
#19	0.8%
#20	0.7%

Note: Rankings for Battlefield 6 and ARC Raiders are likely understated due to late-year releases
Source: Newzoo Game Performance Monitor | 37 markets (excl. China & India)

PlayStation’s long tail is growing, but still competes with major annualized franchises

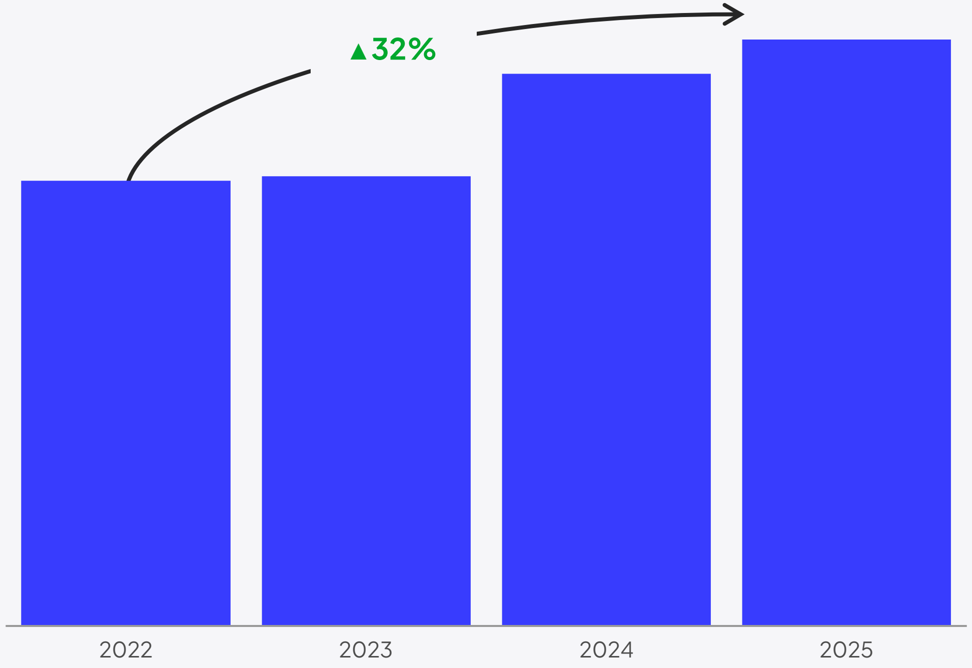
Playtime beyond the Top 20

PlayStation | 2022-2025

PS total ▲17%

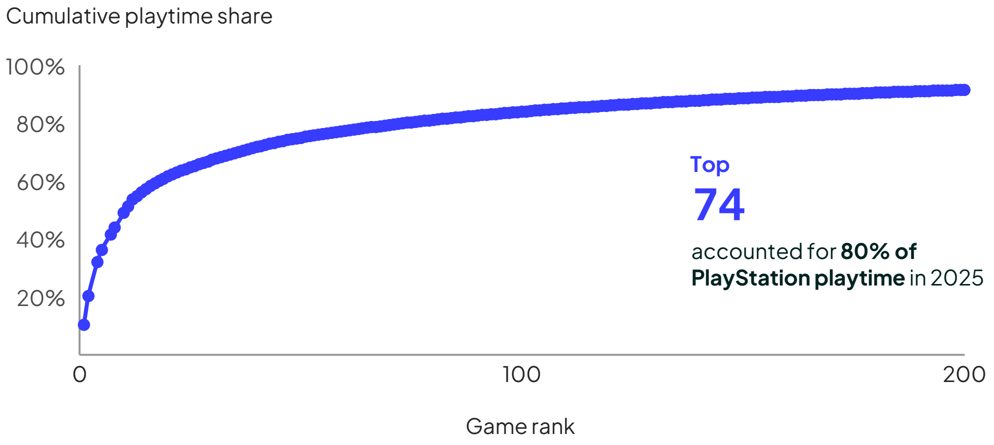
Top 20 ▲9%

Rank 21+ ▲32%



Cumulative playtime share for games ranked 1–200

PlayStation | 2025



Top **74** accounted for **80% of PlayStation playtime** in 2025

Top new releases in 2025 among Rank 21+

by % of total PlayStation playtime

#22	**Elden Ring Nightreign**	**0.6%**
#26	**MLB The Show 25**	**0.5%**
#34	**ARC Raiders**	**0.5%**
#37	**EA Sports College Football 26**	**0.4%**
#38	**Ghost of Yōtei**	**0.4%**

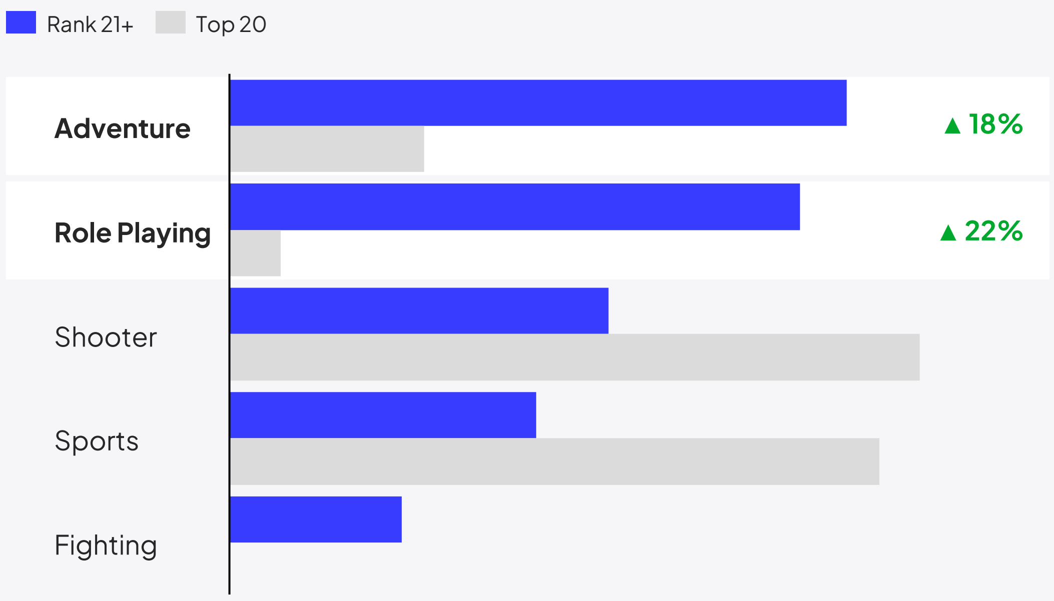
5% of PS playtime came from **annualized franchises** beyond the Top 20

Note: Rankings for Battlefield 6 and ARC Raiders are likely understated due to late-year releases
Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

On PlayStation, the long tail is driven by premium titles in depth-oriented traditional console genres

Genre share by playtime: Rank 21+ vs. Top 20

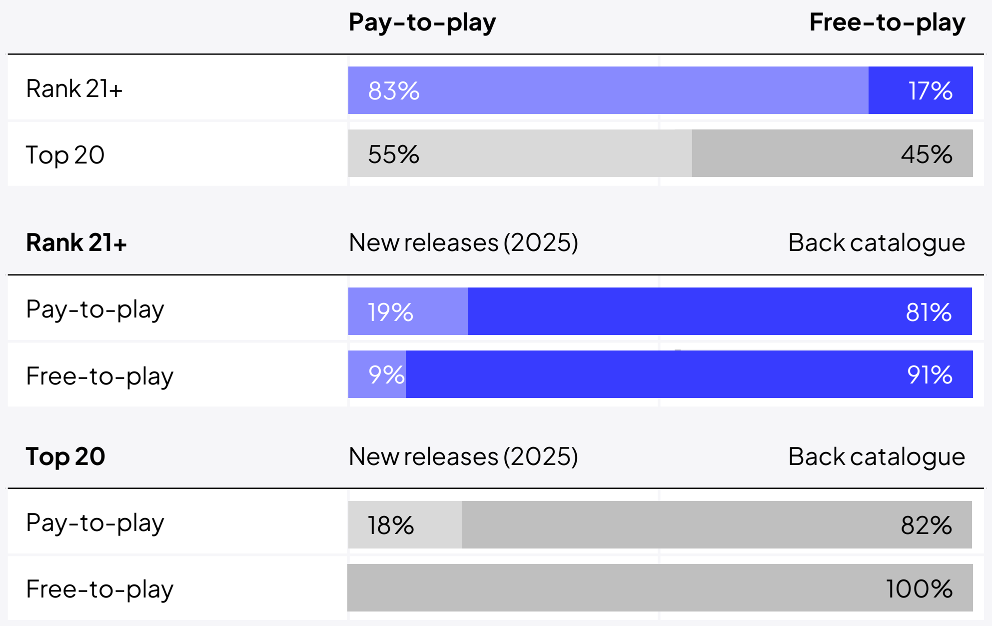
PlayStation | 2025



- Rank 21+ significantly **over-indexes in Adventure and RPG** compared to the Top 20, highlighting demand for narrative and progression-driven games
- **Shooters** and **Sports** under-index, indicating live-service titles and annual franchises are much more concentrated in the Top 20, though they still claim a meaningful share among Rank 21+

Business model & game lifecycle: Rank 21+ vs. Top 20

PlayStation | 2025



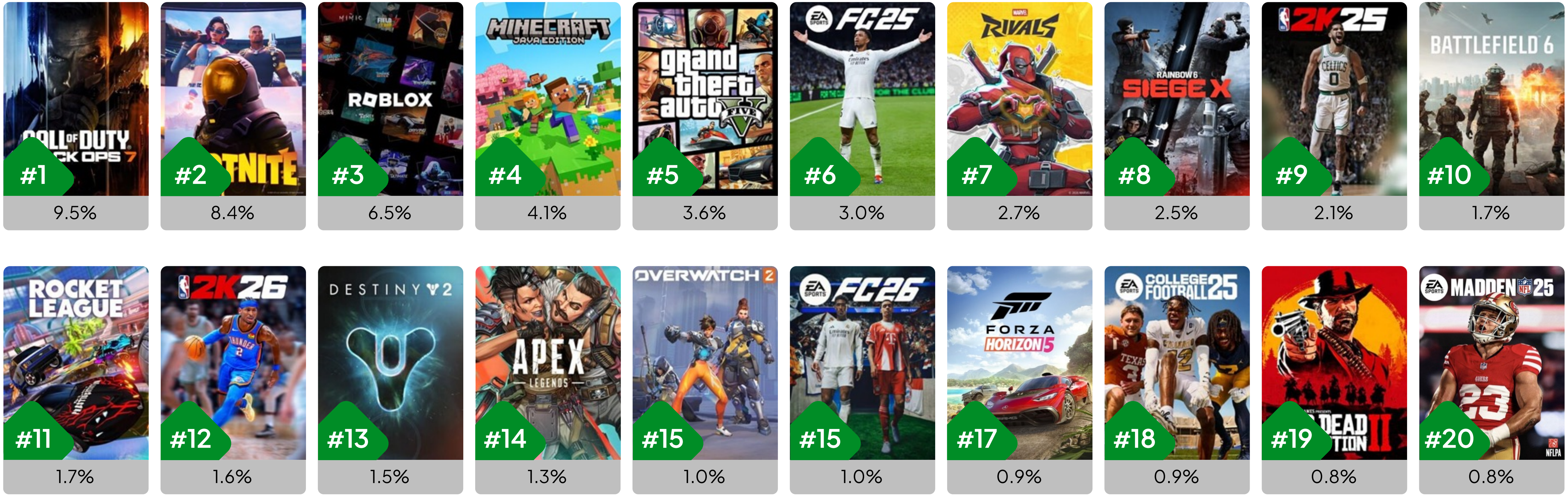
- Rank 21+ skews much more heavily toward **premium titles** than PlayStation's top 20
- Similar to PC, survivability is driven more by **longevity than by new releases**

Note: Call of Duty is grouped into the Pay-to-Play category
Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

Shooter and Sports games dominate Xbox's Top 20 with a playtime distribution that mirrors PC

Top 20 Xbox games by playtime share

2025



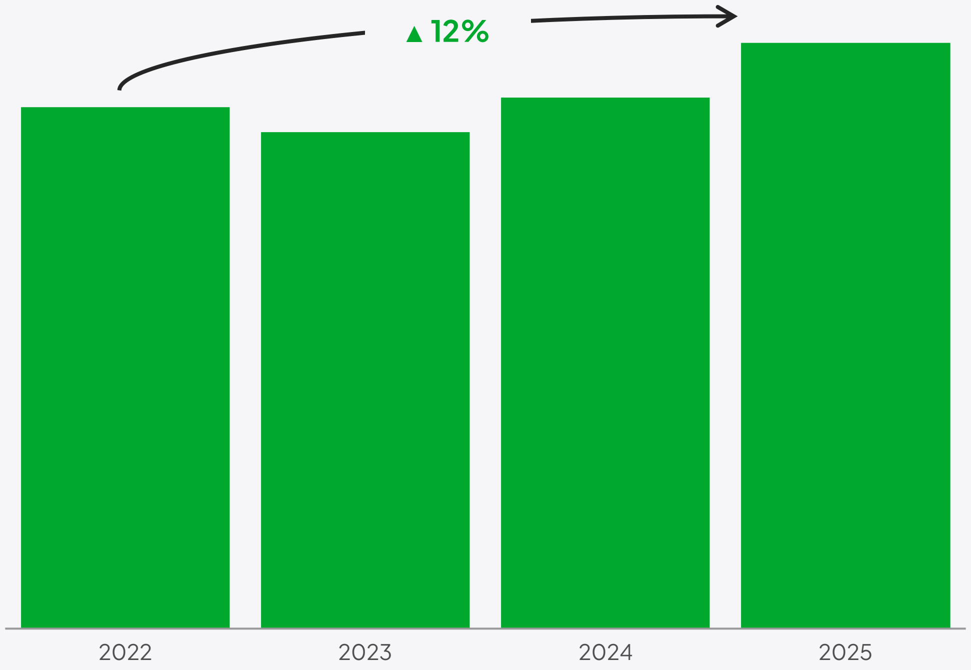
Note: Rankings for Battlefield 6 and ARC Raiders are likely understated due to late-year releases.
Source: Newzoo Game Performance Monitor | 37 markets (excl. China & India)

Xbox playtime growth beyond the Top 20 is driven by Game Pass but reflects redistribution more than platform expansion

Playtime beyond the Top 20

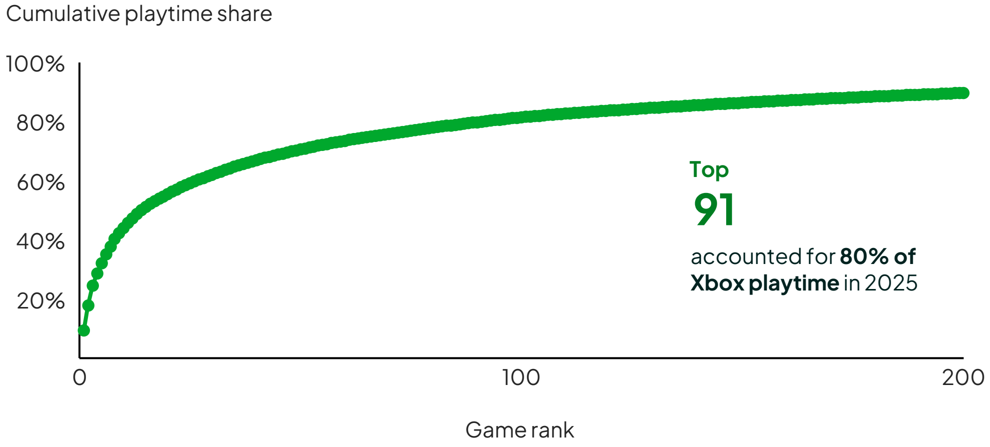
Xbox | 2022-2025

Xbox total	▲3%
Top 20	▼3%
Rank 21+	▲12%



Cumulative playtime share for games ranked 1–200

Xbox | 2025



Top **91** accounted for **80% of Xbox playtime** in 2025

Top new releases in 2025 among Rank 21+

by % of total PlayStation playtime

#21	ARC Raiders	0.8%
#23	EA Sports College Football 26	0.7%
#25	MLB The Show 25	0.7%
#26	Borderlands 4	0.6%
#29	The Elder Scrolls IV: Oblivion Remastered	0.6%

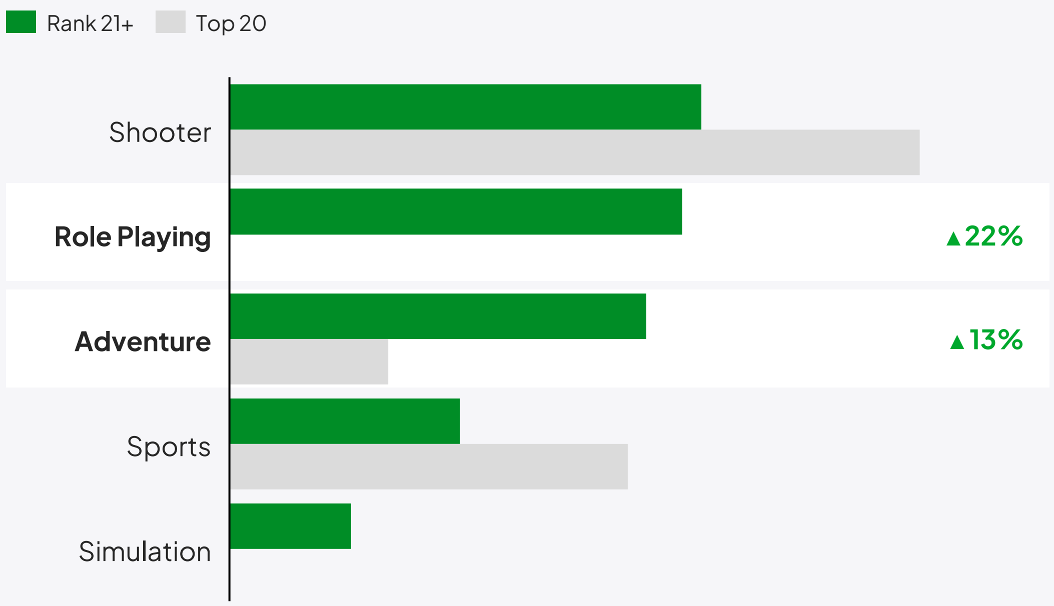
6% of Xbox playtime came from **annualized franchises** beyond the Top 20

Note: Rankings for Battlefield 6 and ARC Raiders are likely understated due to late-year releases.
Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

Premium, progression-driven games define Xbox's long tail, with subscription dynamics supporting newer releases

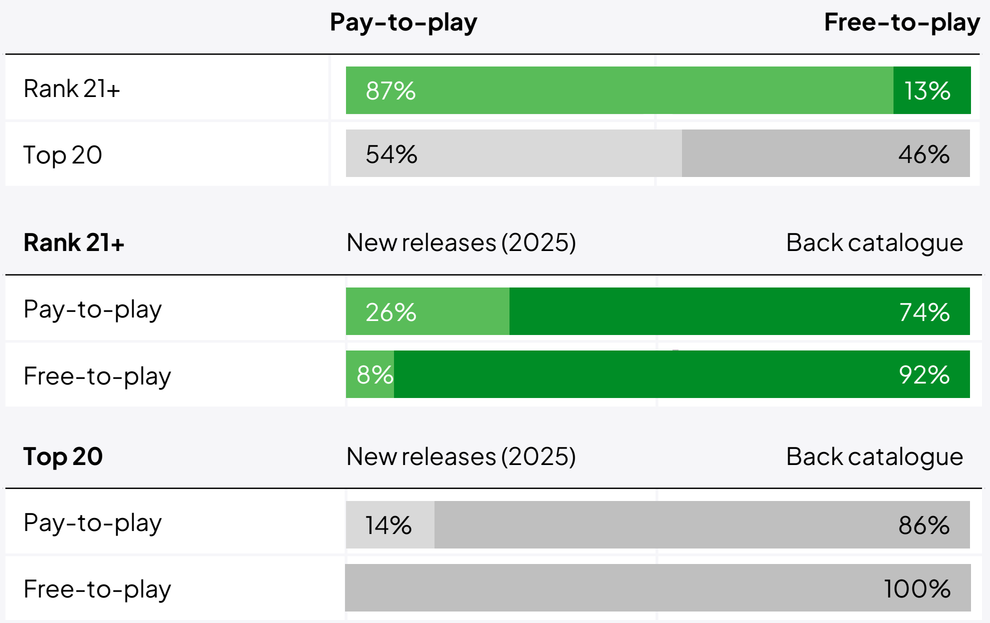
Genre share by playtime: Rank 21+ vs. Top 20

Xbox | 2025



Business model & game lifecycle: Rank 21+ vs. Top 20

Xbox | 2025



- Rank 21+ **over-indexes in RPG and Adventure**, similar to PlayStation
- **Shooters** are significantly over-indexed among the Top 20, but they remain more prominent in Xbox's long tail than on PlayStation, driven by **Xbox-exclusive** franchises like Halo and Gears of War

- Rank 21+ titles skew toward **premium experiences**, but subscription access lowers barriers to trial
- Compared to PC and PlayStation, **a larger share of newer titles** appears in the long tail, highlighting the impact of day-one Game Pass releases

Note: Call of Duty is grouped into the Pay-to-Play category
Source: Newzoo Game Performance Monitor | 37 markets (excluding China & India)

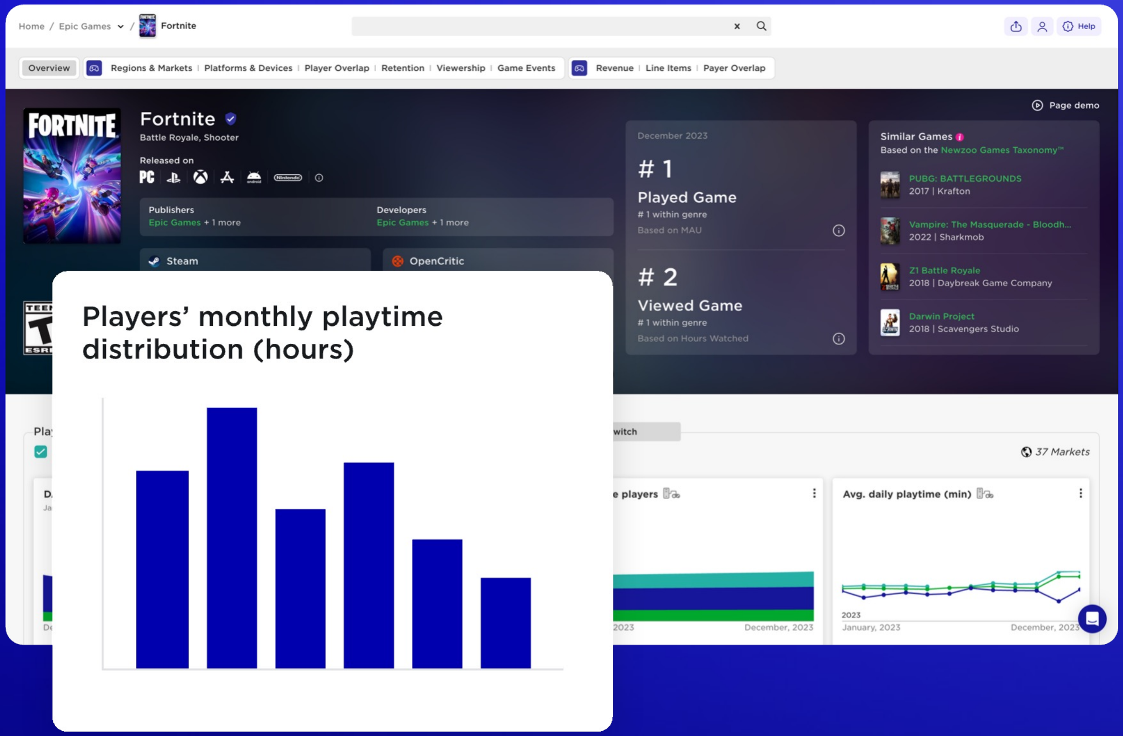
Game Performance Monitor

Quantify engagement beyond the rankings

Analyze playtime, revenue, and retention at scale.

- ✓ Coverage of the **top platforms** PC
- ✓ **Engagement data** (MAU, DAU, lifetime players, play time) of 10.000+ games across 37 markets
- ✓ **Premium and recurring digital revenues** (revenue per SKU, ARPU, ARPPU, LTV) of 1000+ games in 6 markets
- ✓ **Player and spender overlap**, acquisition, retention, and churn between titles

Find out more



Market concentration

Summary

Market concentration remains high across PC, PlayStation, and Xbox, yet the long tail is structurally expanding, most visibly on PC.

Survivability beyond the Top 20 depends less on launch-window momentum and more on platform discovery mechanics, catalog depth, and business model fit.

1. The long tail is expanding, most structurally on PC

Titles ranked 21+ are capturing a growing share of playtime, with PC showing the strongest shift, where Rank 21+ playtime grew 44% from 2022 to 2025.

2. Platform dynamics shape concentration resilience

PC's long tail keeps widening, PlayStation remains more franchise-concentrated, and Xbox's long tail benefits from Game Pass discovery, shifting playtime share more than total hours.

3. Survivability is driven by premium depth, not launch spikes

Enduring winners tend to be premium, progression-heavy titles with strong back-catalog performance (not just breakout launches), with RPG/Adventure over-indexing.

4. Business model viability

Which monetization models perform best under current dynamics?

Business model viability

Which monetization models perform best under current dynamics?

Overview

In this chapter, we examine pricing dynamics across PC, PlayStation, and Xbox using the Newzoo Game Performance Monitor, looking separately at free-to-play and premium games. For F2P, we focus on how effectively games convert engagement into revenue. For premium, we segment games by launch MSRP tier — an imperfect but useful business-scale lens, since games in the same price band tend to be more comparable even when pricing and discount strategies have since diverged.

Mehmet Mert Şahin
Junior Market Analyst

Data scope

Revenue
Digital only, including full-game downloads, microtransactions, DLC, and in-game subscriptions. Multi-game subscriptions (e.g., Game Pass, PlayStation Plus) are excluded. PC data covers multiple merchants, not just Steam.

Markets
US, UK, Germany, France, Spain, and Italy. All data in this section, including playtime, is scoped to these six markets.

Core definitions & key notes

MSRP tiers
Games are categorized by their launch MSRP in the premium section, unless they have since transitioned to free-to-play (e.g., Rocket League and Rainbow Six Siege X).

Standalone premium games
Games that offer a complete product with a single purchase, without relying on continuous updates (slide #73)

Revenue percentages
All revenue share values in this section represent a game's revenue share of its platform's total revenue for the given year, providing a standardized lens for comparing performance across titles, tiers, and platforms

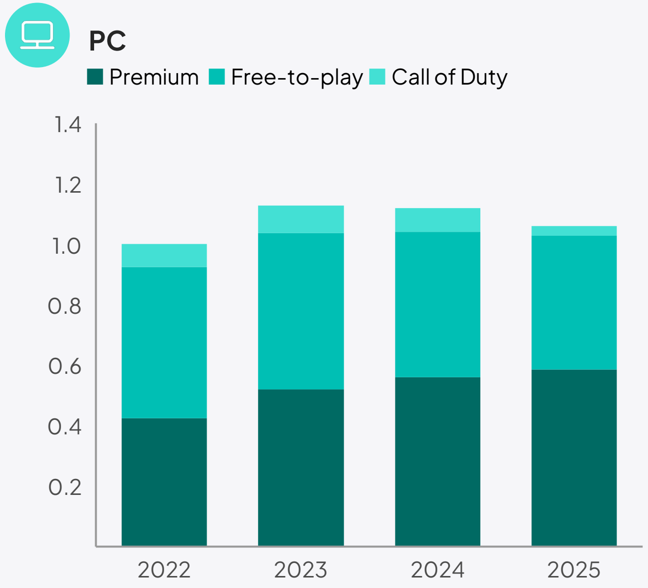
Roblox revenues on PC
Roblox revenue data is not available on PC, but is available on PlayStation and Xbox

Playtime is down in major western markets as growth shifts to emerging regions, with premium gains unable to offset F2P and Call of Duty declines

Playtime distribution by business model (index: 2022)

PC, PlayStation, Xbox | 2022-2025 | US, UK, DE, FR, ES, IT

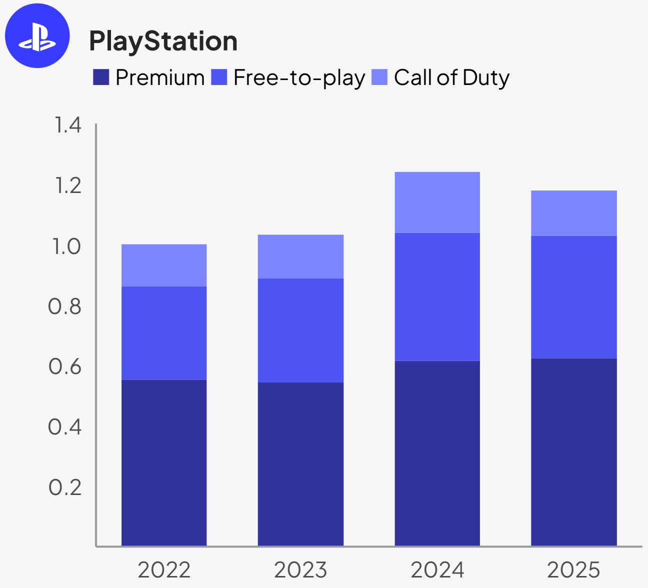
PC



2025 vs. 2024
YoY % growth

Premium	▲4.7%
Free-to-play	▼8.1%
Call of Duty	▼59.4%

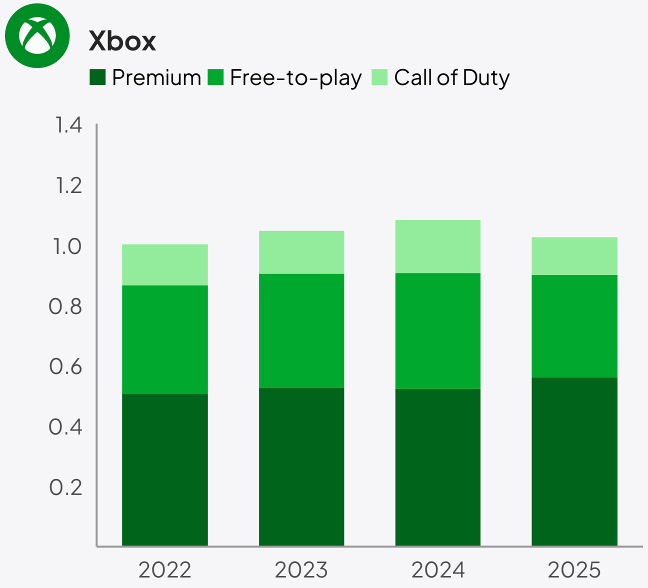
PlayStation



2025 vs. 2024
YoY % growth

Premium	▲1.2%
Free-to-play	▼4.3%
Call of Duty	▼25.5%

Xbox



2025 vs. 2024
YoY % growth

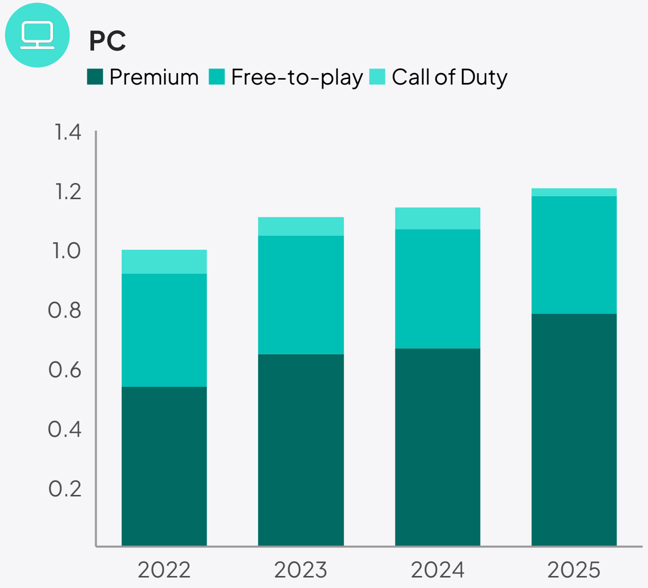
Premium	▲7.0%
Free-to-play	▼11.0%
Call of Duty	▼29.6%

Source: Newzoo Game Performance Monitor | 6 markets (United States, United Kingdom, Germany, France, Spain, and Italy)

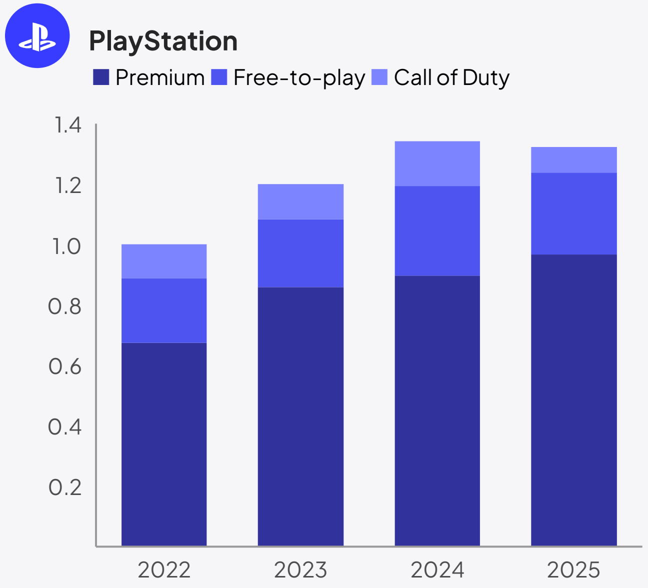
Despite falling playtime, premium drives revenue gains on PC and PlayStation, while Xbox struggles to cover F2P and Call of Duty losses

Revenue distribution by business model (index: 2022)

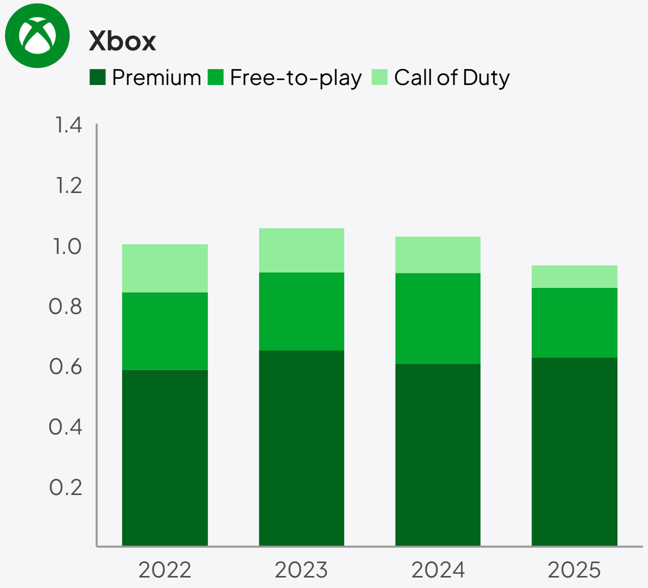
PC, PlayStation, Xbox | 2022-2025 | US, UK, DE, FR, ES, IT



2025 vs. 2024 YoY % change	
Premium	▲17.4%
Free-to-play	▼1.1%
Call of Duty	▼64.3%



2025 vs. 2024 YoY % change	
Premium	▲7.8%
Free-to-play	▼8.2%
Call of Duty	▼42.8%



2025 vs. 2024 YoY % change	
Premium	▲3.6%
Free-to-play	▼23.6%
Call of Duty	▼39.1%

Scope: Digital revenue only, excl. multi-game subs (e.g., Game Pass, PlayStation Plus)
Source: Newzoo Game Performance Monitor | 6 markets (United States, United Kingdom, Germany, France, Spain, and Italy)

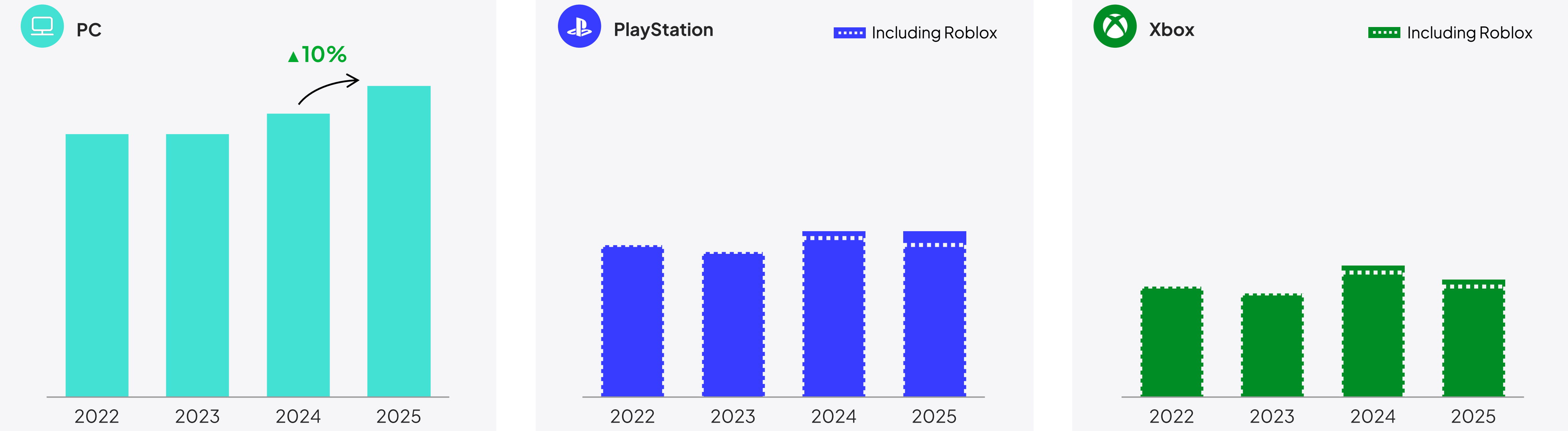
Free-to-play

Are games converting engagement into revenue efficiently enough to sustain growth?

In major western markets, PC’s total free-to-play revenue/playing hour grew 10% year-on-year to nearly 2x that of PlayStation and 3x Xbox’s

Free-to-play revenue per playing hour by platform

PC, PlayStation, Xbox | 2022-2025 | US, UK, DE, FR, ES, IT



2025 vs. 2024

PC revenue per hour is up as playtime declined at a higher rate than revenue

2025 vs. 2024

PlayStation revenue per hour is down as revenues declined at a higher rate than playtime

2025 vs. 2024

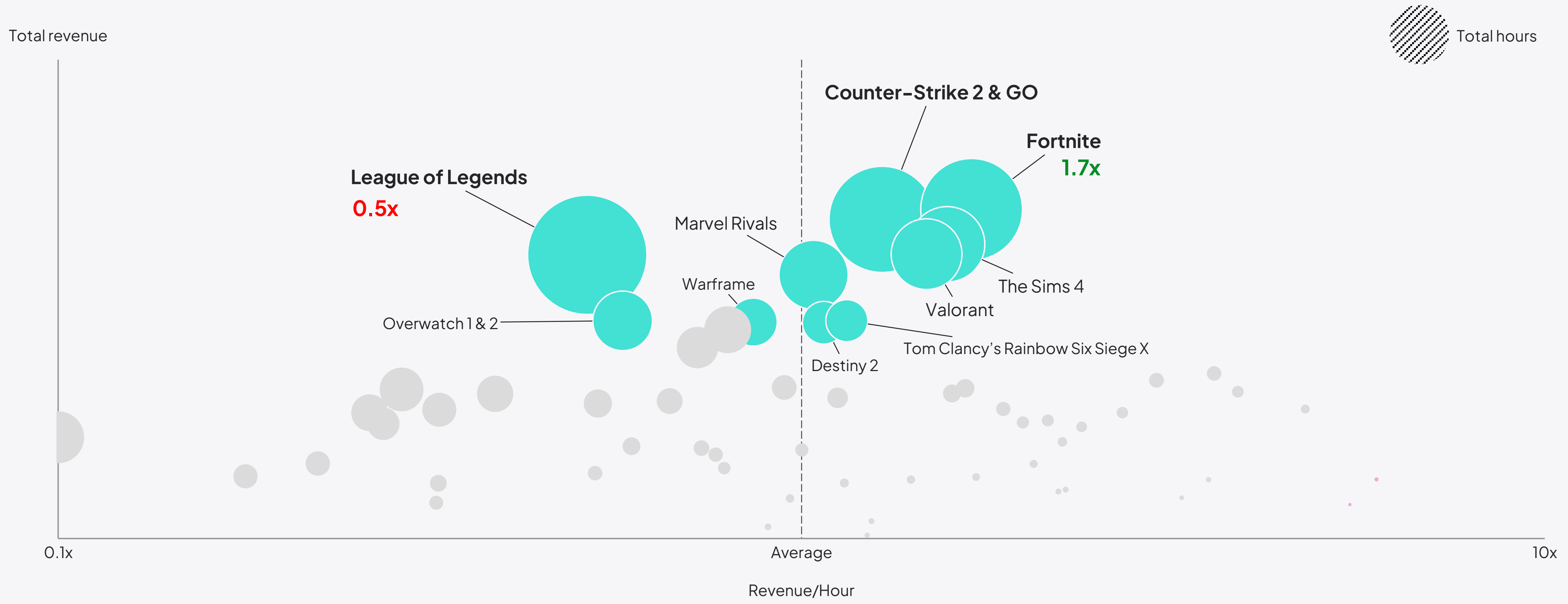
Xbox revenue per hour is down as revenues declined at a higher rate than playtime

Note: Due to a temporary data outage, Roblox revenue data is not available on PC; PlayStation and Xbox are unaffected
Source: Newzoo Game Performance Monitor | 6 markets (United States, United Kingdom, Germany, France, Spain, and Italy)

Fortnite's PC audience remains well monetized despite its decrease in playtime, generating 1.7x more than average

Free-to-play overall revenue by revenue per playtime hour (log scale)

PC | 2025 | US, UK, DE, FR, ES, IT

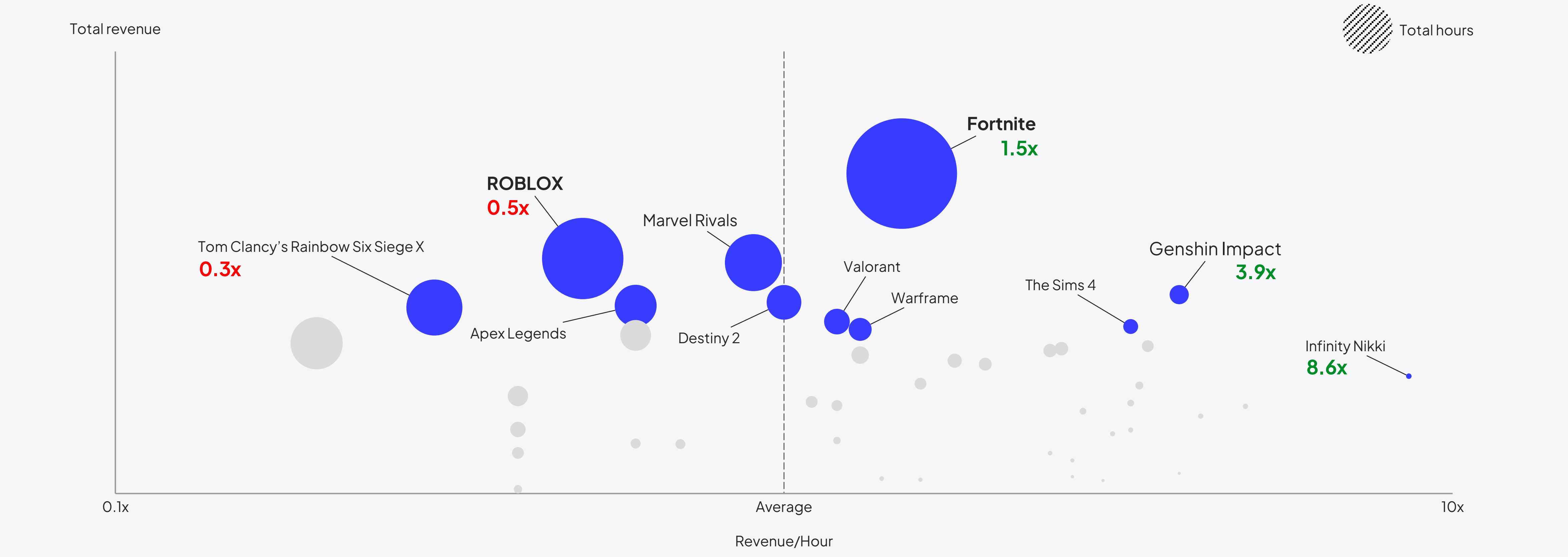


Note: Call of Duty is excluded since we can't separate Warzone free-to-play revenues from premium revenues
Source: Newzoo Game Performance Monitor | 6 markets (United States, United Kingdom, Germany, France, Spain, and Italy)

Roblox revenue per hour is below average on PlayStation, while top anime-themed titles over-index

Free-to-play overall revenue by revenue per playtime hour (log scale)

PlayStation | 2025 | US, UK, DE, FR, ES, IT



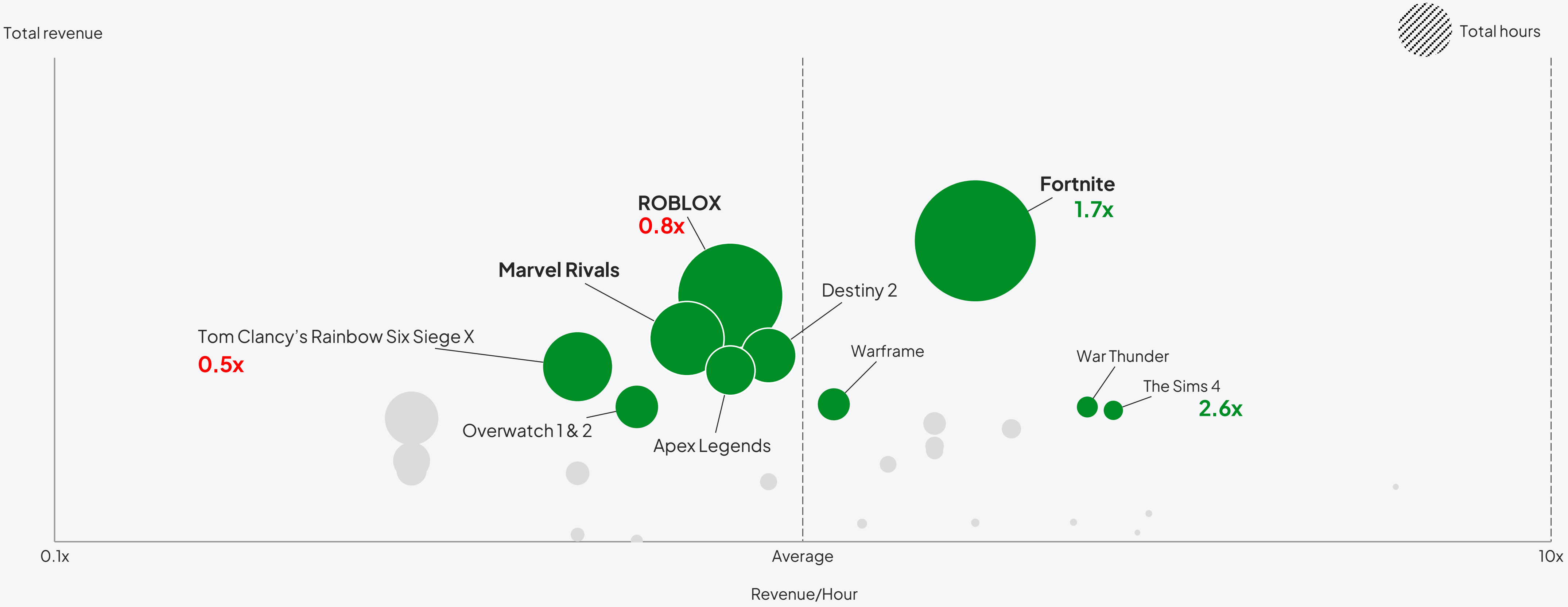
Note: Call of Duty is excluded since we can't separate Warzone free-to-play revenues from premium revenues

Source: Newzoo Game Performance Monitor | 6 markets (United States, United Kingdom, Germany, France, Spain, and Italy)

Xbox's lower revenue per hour shrinks the range, with most titles underperforming when compared against Fortnite

Free-to-play overall revenue by revenue per playtime hour (log scale)

Xbox | 2025 | US, UK, DE, FR, ES, IT



Note: Call of Duty is excluded since we can't separate Warzone free-to-play revenues from premium revenues

Source: Newzoo Game Performance Monitor | 6 markets (United States, United Kingdom, Germany, France, Spain, and Italy)

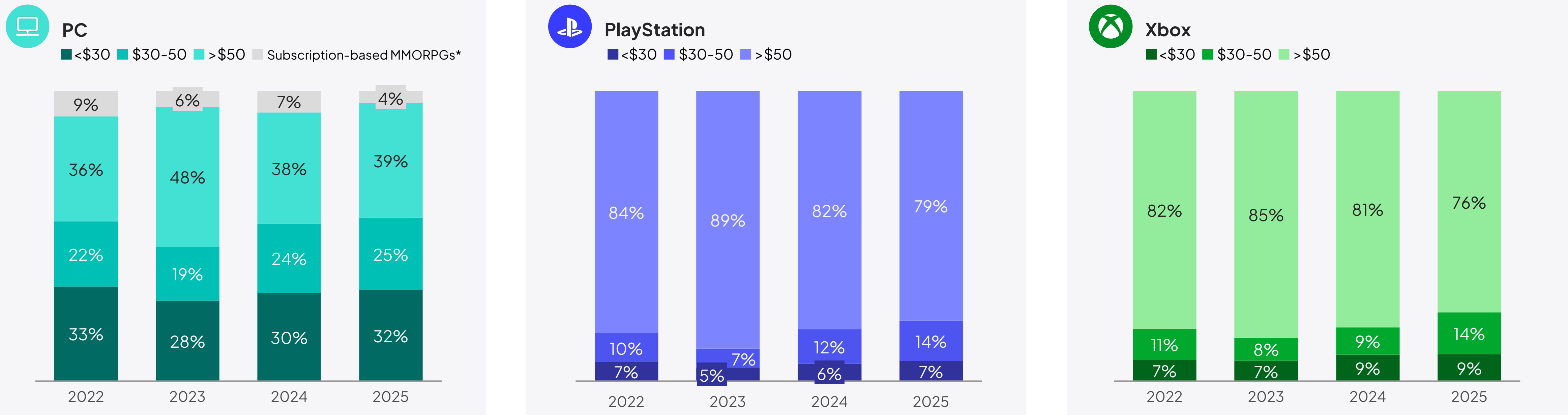
Premium

Which price bands generate revenue most efficiently?

$50+ tier leads PlayStation and Xbox while budget and mid-price games dominate PC, though cheaper titles are gaining ground across platforms

Revenue distribution by launch MSRP

PC, PlayStation, Xbox | 2022-2025 | US, UK, DE, FR, ES, IT



- **Sub-$30 games take a significant portion**
- The $30-$50 segment isn't growing as fast as consoles, but already accounts for a larger share

- **>$50 games still dominate**, their share is slipping due to a two-year shortage of major blockbusters
- The $30-$50 and <$30 segments have been growing, indicating a potential shift

- **>$50 games** show a similar trend to PlayStation
- The $30-$50 segment saw an impressive jump in 2025, driven in part by HELLDIVERS 2's late Xbox launch

*E.g., World of Warcraft. Not to be confused with subscription services like Xbox Game Pass or PlayStation Plus
Note: Call of Duty is excluded since we can't separate Warzone free-to-play revenues from premium revenues
Source: Newzoo Game Performance Monitor | 6 markets (United States, United Kingdom, Germany, France, Spain, and Italy)

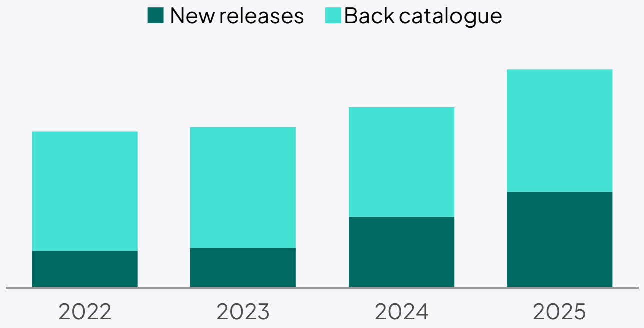
Sub-$30 games thrive on PC via indie breakout success; the console market is much smaller and dominated by Minecraft

Aggregated revenue for <$30 games

PC, PlayStation, Xbox | 2022-2025 | US, UK, DE, FR, ES, IT

PC

Revenue growth 2022-2025 ▲40%

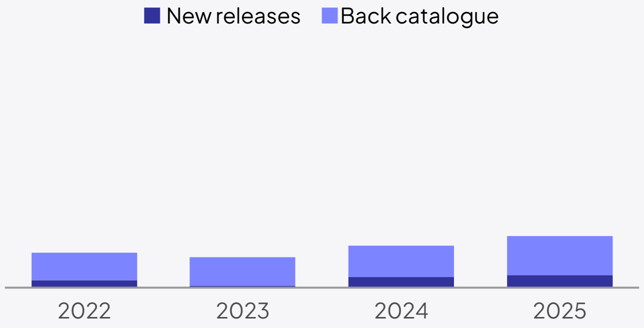


Top <$30 PC titles in 2025
by % of total PC revenue

1.	Schedule I	1.6%
2.	Minecraft	1.3%
3.	R.E.P.O.	1.0%
4.	Dead by Daylight	0.8%
5.	PEAK	0.6%

PlayStation

Revenue growth 2022-2025 ▲50%

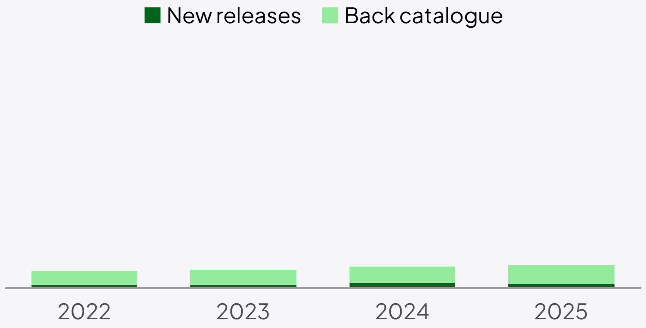


Top <$30 PS titles in 2025
by % of total PS revenue

1.	Minecraft	1.4%
2.	Dead by Daylight	0.4%
3.	Dispatch	0.3%
4.	REMATCH	0.2%
5.	theHunter: Call of the Wild	0.2%

Xbox

Revenue growth 2022-2025 ▲35%



Top <$30 Xbox titles in 2025
by % of total Xbox revenue

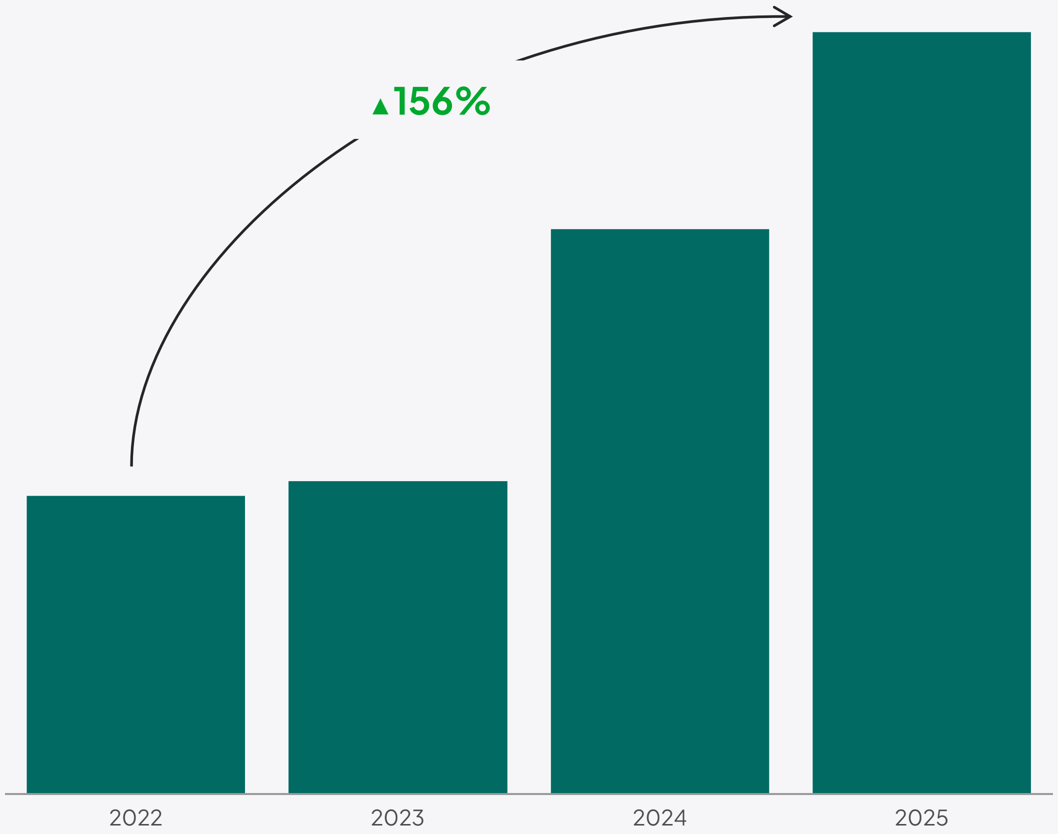
1.	Minecraft	2.0%
2.	Dead by Daylight	0.5%
3.	theHunter: Call of the Wild	0.4%
4.	Phasmophobia	0.3%
5.	Wobbly Life	0.2%

Source: Newzoo Game Performance Monitor | 6 markets (United States, United Kingdom, Germany, France, Spain, and Italy)

Sub-$30 new releases are reshaping the PC market, capturing an increasing share of player spending year over year

Aggregated revenue for <$30 games (new releases only)

PC | 2022-2025 | US, UK, DE, FR, ES, IT



9% **Sub-$30 new releases accounted for 9%** of total PC revenue in 2025

Top 2023 new releases
by % of total PC revenue

Lethal Company	0.8%
BattleBit Remastered	0.6%
Dave the Diver	0.2%
Party Animals	0.2%
Dredge	0.2%

Top 2024 new releases
by % of total PC revenue

Palworld	2.1%
Path of Exile 2	0.7%
Enshrouded	0.7%
Sons of the Forest	0.3%
TCG Card Shop Simulator	0.3%

Top 2025 new releases
by % of total PC revenue

Schedule I	1.6%
R.E.P.O.	1.0%
PEAK	0.6%
Dispatch	0.5%
Silksong	0.3%

Source: Newzoo Game Performance Monitor | 6 markets (United States, United Kingdom, Germany, France, Spain, and Italy)

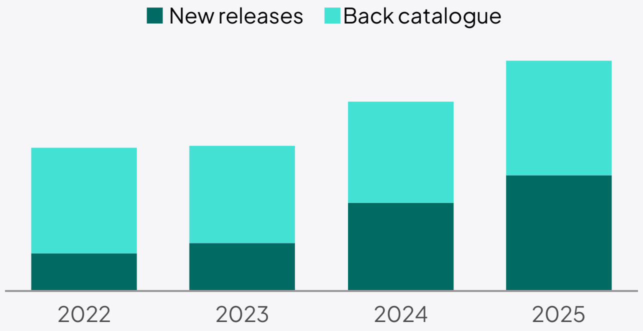
Mid-price is the new sweet spot everywhere, although on Xbox, Game Pass keeps Expedition 33 and Oblivion off the leaderboard

Aggregated revenue for $30-$50 games

PC, PlayStation, Xbox | 2022-2025 | US, UK, DE, FR, ES, IT

PC

Revenue growth 2022-2025 ▲60%

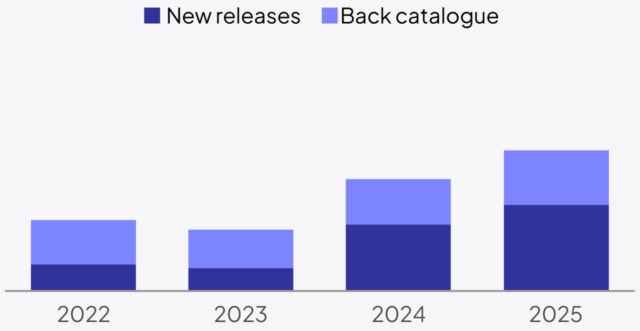


Top $30-$50 PC titles in 2025
by % of total PC revenue

1.	ARC Raiders	2.0%
2.	Oblivion Remastered	0.9%
3.	HELLDIVERS 2	0.9%
4.	Expedition 33	0.7%
5.	Dune: Awakening	0.6%

PlayStation

Revenue growth 2022-2025 ▲99%

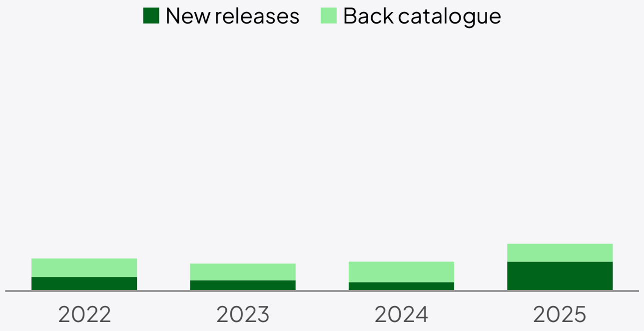


Top $30-$50 PS titles in 2025
by % of total PS revenue

1.	ARC Raiders	1.0%
2.	Ready or Not	1.0%
3.	Expedition 33	0.9%
4.	Split Fiction	0.8%
5.	Oblivion Remastered	0.7%

Xbox

Revenue growth 2022-2025 ▲45%



Top $30-$50 Xbox titles in 2025
by % of total Xbox revenue

1.	HELLDIVERS 2	1.6%
2.	ARC Raiders	1.4%
3.	Ready or Not	0.7%
4.	Dreamlight Valley	0.7%
5.	Split Fiction	0.6%

Source: Newzoo Game Performance Monitor | 6 markets (United States, United Kingdom, Germany, France, Spain, and Italy)

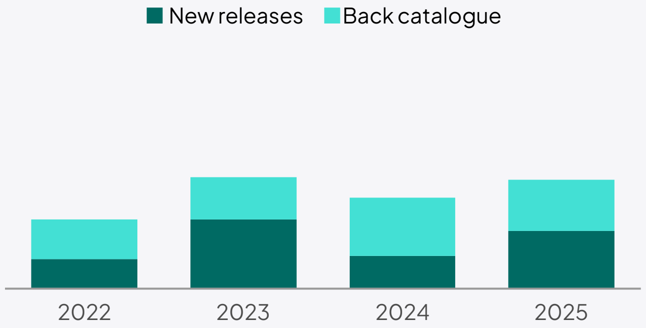
PC’s >$50 segment outgrows consoles (Xbox especially) and is less reliant on sports titles; on console, sports franchises dominate

Aggregated revenue for >$50 games

PC, PlayStation, Xbox | 2022-2025 | US, UK, DE, FR, ES, IT

PC

Revenue growth 2022-2025 ▲58%

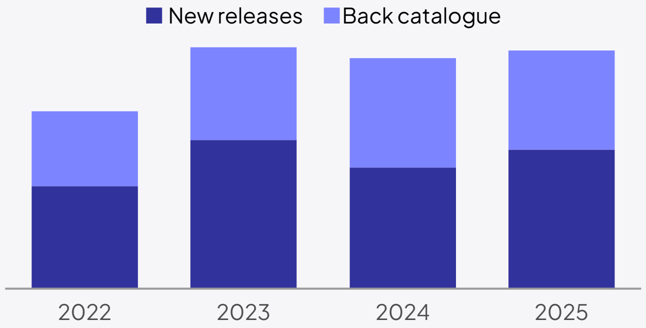


Top >$50 PC titles in 2025
by % of total PC revenue

1.	Battlefield 6/REDSEC	3.9%
2.	EA Sports FC 26	1.3%
3.	Monster Hunter Wilds	1.1%
4.	Borderlands 4	1.1%
5.	EA Sports FC 25	0.8%

PlayStation

Revenue growth 2022-2025 ▲34%

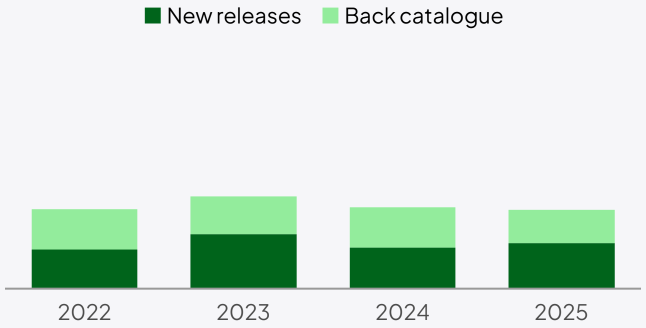


Top >$50 PS titles in 2025
by % of total PS revenue

1.	EA Sports FC 26	9.8%
2.	EA Sports FC 25	6.7%
3.	NBA 2K26	4.6%
4.	NBA 2K25	3.2%
5.	Battlefield 6/REDSEC	2.7%

Xbox

Revenue growth 2022-2025 0%



Top >$50 Xbox titles in 2025
by % of total Xbox revenue

1.	NBA 2K26	5.7%
2.	EA Sports FC 26	5.0%
3.	Battlefield 6/REDSEC	3.7%
4.	NBA 2K25	3.7%
5.	EA Sports FC 25	3.4%

Note: Call of Duty is excluded since we can’t separate Warzone free-to-play revenues from premium revenues
Source: Newzoo Game Performance Monitor | 6 markets (United States, United Kingdom, Germany, France, Spain, and Italy)

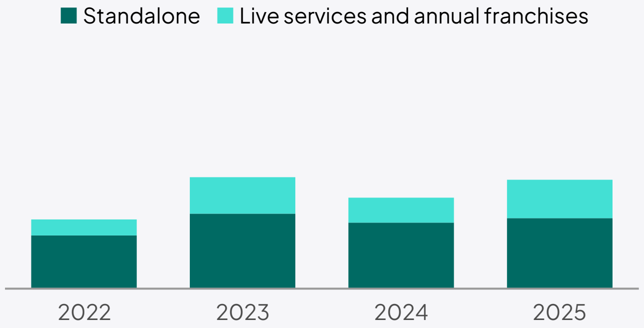
When excluding live-service and annual sports, PC closes the gap with PlayStation as a major destination for $50+ games, while Xbox declines

Aggregated revenue for >$50 games (standalone vs. live-service and annual sports titles)

PC, PlayStation, Xbox | 2022-2025 | US, UK, DE, FR, ES, IT

PC

Standalone revenue growth 2022-2025 ▲32%

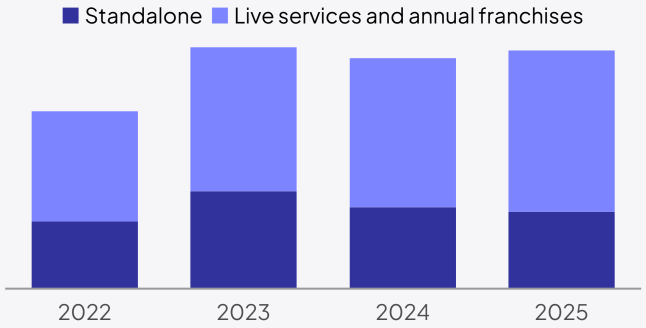


Top >$50 PC standalone titles in 2025
by % of total PC revenue

1.	Monster Hunter Wilds	1.1%
2.	Borderlands 4	1.1%
3.	Baldur's Gate 3	0.7%
4.	Kingdom Come: Deliverance II	0.7%
5.	Sid Meier's Civilization VII	0.7%

PlayStation

Standalone revenue growth 2022-2025 ▲14%

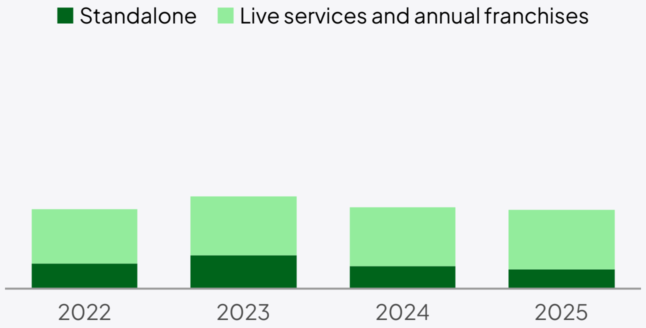


Top >$50 PS standalone titles in 2025
by % of total PS revenue

1.	Assassin's Creed Shadows	1.6%
2.	Ghost of Yōtei	1.5%
3.	Forza Horizon 5	1.5%
4.	Monster Hunter Wilds	0.9%
5.	Borderlands 4	0.8%

Xbox

Standalone revenue growth 2022-2025 ▼22%



Top >$50 Xbox standalone titles in 2025
by % of total Xbox revenue

1.	Assassin's Creed Shadows	1.3%
2.	Borderlands 4	1.2%
3.	Monster Hunter Wilds	0.7%
4.	Red Dead Redemption 2	0.7%
5.	Forza Horizon 5	0.5%

Source: Newzoo Game Performance Monitor | 6 markets (United States, United Kingdom, Germany, France, Spain, and Italy)

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Strategic support for monetization and growth decisions

- ✓ Game concept testing & TAM forecasting
- ✓ Target audience sizing & segmentation strategy
- ✓ Genre, competitive & live service deep dives
- ✓ Launch & campaign performance analysis

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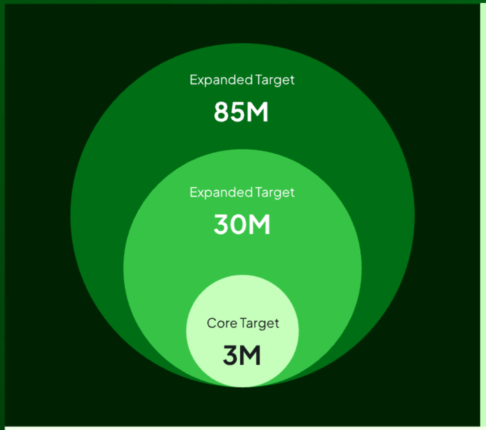

Scenario	Forecast	Lifetime Players
High	Top 25 %	15.5M
Mid	Median	4.6M
Low	Bottom 25%	1.5M

Theme
Sci-fi

Subgenre
Action-Adventure

Players
Online Multiplayer

Game mechanics
Crafting

Business model viability

Summary

In major western markets (US, UK, DE, FR, ES, IT), premium spend is the primary revenue growth driver across platforms, even as playtime declines.

Mid-price titles ($30–$50) are emerging as the new sweet spot across PC and console, sub-$30 games are capturing a growing share of PC spending, while F2P faces monetization pressure on consoles.

1. Premium is offsetting engagement decline unevenly

Across major western markets, playtime is down, but premium revenue is growing on PC and PlayStation. Xbox's premium gains are weaker and insufficient to offset free-to-play and Call of Duty declines.

2. Free-to-play efficiency is strongest on PC

PC F2P revenue per playing hour rose (+10% YoY), now nearly 2x PlayStation and 3x Xbox, while console F2P monetization efficiency declined as revenues fell faster than playtime.

3. Pricing power is shifting toward mid-price and selective premium tiers

The $30–$50 segment is the fastest-growing band across platforms; sub-$30 thrives structurally on PC via breakout indies; $50+ remains console-led but is flattening on Xbox and becoming more competitive on PC when excluding annual/live-service franchises.

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Game Performance Monitor

Title-level engagement (MAU, DAU, playtime, churn, more) and digital revenue data for thousands of PC & console games.

PC

Game Health Tracker

Title-level consumer insights, awareness and purchase funnel

Global Gamer Study

Yearly in-depth survey profiling 73.000 gamers worldwide

Business & Store Intelligence

Complete toolkit for optimizing games' store presence, improving discoverability, and tracking marketing attribution.

Market Reports & Forecasts

Games market sizing & forecasts for 100+ countries and the key trends on a global and local level.

Consulting & Custom Research

Tailored solutions to critical business challenges.

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- ✓ Campaign analysis

From idea to industry leader:
We help you define success every step of the way

1

Long-term strategy

Where should our business be in 5/10 years?

2

Concept & game development

What is going to be our next hit title?

Greenlight

3

Pre-launch & Go To Market

How do we effectively market our game?

Launch

4

Post-launch & Monetization

How can we further monetize our game ?

(premium, live ops, DLC, in-game)

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