

MMORPG Gaming - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The MMORPG Gaming Market size is estimated at USD 25.34 billion in 2024, and is expected to reach USD 42.22 billion by 2029, growing at a CAGR of 10.75% during the forecast period (2024-2029).

The MMORPG market will likely benefit from technological advancements, including improved graphics, more powerful hardware, and faster internet speeds. These advancements can enhance the gaming experience, increasing player engagement and retention.

Key Highlights

- MMORPGs offer a unique social experience, allowing players to interact and collaborate with others in a virtual world. In an increasingly connected world, MMORPGs provide a platform for individuals to connect with like-minded players, form friendships, and build communities. The sense of belonging and social interaction offered by MMORPGs appeals to many players, especially those seeking social connections and a sense of community.
- MMORPGs often feature extensive progression systems, where players can level up their characters, acquire powerful gear, and unlock new abilities. This long-term progression and associated sense of achievement can be advantageous for players. The journey of character development, the pursuit of rare items, and overcoming challenging obstacles provide a sense of satisfaction and accomplishment.
- As internet connectivity becomes more widespread and accessible worldwide, more people have the means to connect and engage in online gaming experiences. The growth of internet penetration, particularly in emerging markets, expands the potential player base for MMORPGs. For instance, according to the DataReportal, Ireland, Norway, Saudi Arabia, and the United Arab Emirates currently hold the top four spots in the list of nations with the highest internet penetration rates, each recording 99 percent as of January 2023. As of July 2022, 64.4 percent of people worldwide were using the Internet.

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- The rise of eSports and competitive gaming has increased the popularity of MMORPGs. MMORPGs incorporating competitive elements, such as player-versus-player battles and guild wars, attract players who enjoy competitive gaming and spectating eSports events. The growth of eSports has further fueled the demand for MMORPGs.
- MMORPGs rely heavily on player retention and engagement to sustain their player base and generate revenue. However, keeping players engaged in MMORPGs over the long term can be challenging due to factors like burnout, competing game releases, and changing player preferences. If players become disengaged or move on to other games, it can impact the growth of MMORPGs.
- With the outbreak of COVID-19, the market witnessed positive growth with the increasing popularity of online multiplayer games, as people stayed at home for the maximum time due to lockdowns being imposed by various governments and keeping safe from being affected. The mobile platform is witnessing a significant increase in consumer engagement with mobile-based gaming, especially in mobile-first markets, such as Asia, the Middle East, and Latin America. According to Verizon, the usage of gaming apps rose 75% week-over-week during April 2020 and is expected to increase further.

MMORPG Market Trends

Rising Smartphone Penetration and Increasing Penetration of Internet among Developing Economies may Drive the Market Growth

- With the increasing penetration of smartphones, more people have access to mobile devices capable of running MMORPG games. Smartphones have become ubiquitous, reaching a broader demographic of players, including those who may not have access to gaming consoles or PCs. Smartphones' ease of access and portability enable players to engage with MMORPGs anytime and anywhere, contributing to market growth.
- MMORPG gaming has exploded in the past couple of years, especially on mobile platforms like smartphones and tablets. This growing demand for mobile-based gaming is a direct result of the multiple technological advancements in the market, such as AR, VR, cloud gaming, and 5G. This trend considers that the mobile gaming platform industry primarily relies on new technology. Another trend in the market includes the rise of the hyper-casual game genre.
- The release of 5G and unlimited data plans is also expected to be key factors toward the success of cloud gaming globally, as most gamers currently prefer games on mobile devices. The increasing services and investment in 5G infrastructure are also vital to this success. According to Ericsson, globally, 5 billion 5G subscriptions are anticipated by the end of 2028, representing 55% of all mobile subscriptions, and 5G subscription uptake is likely to be more rapid than that of 4G following its launch, with 5G estimated to achieve 1 billion subscriptions two years sooner than 4G.
- MMORPG games are being provided on the Android platform, which is expected to gain significant traction in the mobile-based gaming platform in the forecasted period. People prefer more paid application MMORPG games on the Android platform. For instance, old-school RuneScape for mobile devices has gained a lot of traction and is one of the significant MMORPGs on Mobile, where charges range from USD 10.99 per month to USD 99.99 per year.
- All the MMORPG game-developing companies are releasing their products for mobile phones due to their market potential. For example, Ashfall, a shooter MMORPG from NetEase, has been released. Ashfall, formerly known as Project 56, would be launched on PCs and mobile devices in 2023.
- While multiple gaming options are available for smartphones, the screen size might be too limiting to get an immersive gaming experience. A gaming tablet has been an excellent product for consumers who want to enjoy games on the go but want the option of a larger screen. Multiple gaming phones are available and more portable than a tablet. However, the bigger screen, much more battery life, and excellent processing power of the tablets have been the most important factors for their growth in the market.

Asia Pacific is Expected to Witness Significant Growth Rates

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- The Asia-Pacific region has a robust gaming culture with a long history of enthusiasm for video games. Gaming is deeply embedded in the culture, and players are strongly associated with online multiplayer experiences. This cultural foundation has created a receptive audience for MMORPGs, driving their popularity and growth in the region.
- The Asia-Pacific region has a significant population, including countries like China and India, with billions of people. This large population provides a substantial MMORPG player base, creating massive market potential. The sheer number of potential players fuels the growth of the MMORPG gaming market in the region.
- Also, the Asia-Pacific region has been at the forefront of technological advancements, particularly in internet infrastructure and mobile technology. High-speed internet connectivity and the proliferation of smartphones have made it easier for players to access and engage with MMORPGs. The availability of advanced technology supports the growth of the MMORPG market in the region.
- Mobile gaming has seen explosive growth in the Asia-Pacific region. The convenience and portability of smartphones, coupled with the availability of affordable data plans, have made mobile gaming accessible to a wide range of players. As MMORPG developers adapt their games for mobile platforms, the popularity of mobile MMORPGs contributes to the overall growth of the market in the region.
- According to the Publishers Association of China's Game Committee and the China Audio-video and Digital Publishing Association, the number of mobile gamers in China increased between 2014 and 2019 before reaching a peak of about 656 million in 2021, slightly declining in 2022. However, mobile gamers in 2022 were recorded at around 654.86 million. Such a significant size would considerably benefit various MMORPG vendors across the region.

MMORPG Industry Overview

The MMORPG gaming market is fragmented in nature and comprises many global and regional players. These gaming developers are investing more in research and development activities to offer new solutions for gamers. The companies are also entering into strategic partnerships and other organic & inorganic growth strategies to earn a competitive edge.

In February 2023, the upcoming MMO Throne and Liberty from NCSoft was announced to be available to Western and Japanese players owing to a partnership between NCSoft and Amazon Games. The game will be released via Amazon in North America, South America, Europe, and Japan. It debuts on the PlayStation 5, Xbox Series X/S, and PC at an indeterminate time.

In November 2022, Sony, a Japan-based electronics provider, and NCSoft, a South Korea-based videogame developer, announced a partnership to create the Horizon MMORPG. As part of Sony's drive into live service games, the South Korean studio will complete the project behind the Lineage and Guild Wars MMO series and be marketed to a global audience.

In March 2022, The release of Dungeon & Fighter Mobile in Korea was announced by NEXON Co. Ltd, a global player in virtual worlds. The new game expands Dungeon & Fighter's arcade action and enjoyment to mobile, the gaming industry's fastest-growing platform. On one of eight servers that can accommodate a total of one million players concurrently, the players first choose a character.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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