

Subscription-Based Gaming - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Subscription-Based Gaming Market size is estimated at USD 11.99 billion in 2025, and is expected to reach USD 19.18 billion by 2030, at a CAGR of 9.84% during the forecast period (2025-2030).

Key Highlights

- Continuous technological advancements in the gaming industry are propelling the market's growth. Subscription services, which charge a regular fee for access to a game library, significantly contribute to the market.
- The release of 5G and the emergence of unlimited data plans are also expected to be key factors aiding the success of subscription-based cloud gaming across the world, as most gamers today prefer playing games on their mobile devices. In addition, the increasing services and investments in 5G infrastructure are vital to this success. According to Ericsson, 5G mobile subscriptions in Asia-Pacific will reach around 1,545 million by 2025.
- Various bundling service innovations drive the market, and the subscription model allows players to pay regularly to access additional in-game material and features for a specified length of time. The subscription model is also commonly seen in mobile gaming as an in-app purchase. While casual users will continue to play the games for free, those who pay can experience a premium gaming experience.
- Subscriptions typically offer a more affordable entry point for gamers. Instead of paying a significant upfront cost for a single game, subscribers gain access to a library of games for a monthly fee, which can often be lower than the cost of purchasing even one new game.
- The number of service providers operating in markets is increasing rapidly, thus creating a competitive space where vendors are forced to offer benefits to consumers at a loss that may not be sustainable over a long period. Once the service provider switches the business plan to turn toward profitability by increasing the prices of the services offered, the consumers may also switch to newer players offering similar services at competitive prices. Such scenarios are challenging the growth of the service providers.

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- The Post COVID also increased the need for people to engage in immersive experiences at home. In addition, affordable VR equipment and 5G implementation allowed many users worldwide to engage in mobile gaming. In July 2023, Verizon stated that over 200 million people, or around two of every three Americans, enjoyed the world's fastest and most reliable 5G Ultra Wideband service offered by the company. The power and performance of a Verizon 5G Ultra Wideband, with fast download speeds and the capability to support data-intensive activities, can be experienced by customers in the United States.

Subscription Based Gaming Market Trends

The Mobile Gaming Segment is Expected to Hold Significant Market Share

- Mobile gaming has emerged as a significant segment in the gaming subscriptions market due to its accessibility and widespread adoption. These subscriptions offer access to a curated selection of premium mobile games for a monthly or yearly fee. Subscribers can enjoy ad-free gaming experiences with full access to all features and content of the included games.
- Cross-platform subscriptions have become popular with the increasing integration of gaming ecosystems across multiple platforms. Subscribers can access games on their mobile devices and other platforms such as consoles, PCs, or streaming devices that offer seamless gaming experiences.
- Certain mobile games offer a multiplayer experience that requires a subscription for access to online multiplayer modes, exclusive tournaments, or additional social opportunities for competitive play.
- Some mobile gaming subscriptions focus on educational or learning-oriented games, catering to parents and educators looking to engage their children in fun and educational activities on mobile devices. These subscriptions often include various educational games and interactive content designed to enhance learning outcomes.
- The increasing number of smartphone users globally provides a significant growth opportunity for subscription-based mobile game services, as they offer a convenient, affordable, and diverse gaming experience to a broad audience. According to the GSMA, by 2030, North America's smartphone adoption rate is expected to increase to 90%, with regions like CIS and Asia-Pacific projected to register more significant growth.

Asia-Pacific is Expected to Witness Significant Growth in the Market

- Asia-Pacific has witnessed significant advancements in internet infrastructure, with the widespread availability of high-speed broadband and 5G networks in urban and rural areas. This improved connectivity enables seamless streaming of cloud-based games with minimal latency and buffering, thus driving the demand for subscription-based gaming in the region.
- China boasts the world's largest gaming population, with millions of gamers across various age groups and demographics. According to the industry association CGIGC, in July 2023, China's video game player population grew to 668 million. The popularity of gaming as a form of entertainment, social activity, and competitive sport fuels the demand for diverse gaming experiences offered by subscription-based gaming platforms.
- The Chinese government has supported technological innovation and digital entertainment industries, including gaming. Policies and initiatives promoting the development of cloud infrastructure, gaming content, and digital services contribute to the growth of the gaming subscriptions market in China. For instance, in December 2023, the National Press and Publication Administration (NPPA) approved 105 new online games via WeChat, describing the move as a show of support for the prosperity and healthy development of the online game industry.
- In December 2023, according to the Ministry of State for Trade and Industry, Singapore had the potential to become a hub for gaming and esports in Asia, where 45% of the world's gamers live. Almost a third of Singapore's population class themselves as gamers, making the country a lucrative market for subscription-based gaming.

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- The growing demand for subscription-based gaming in the region is fueled by advanced internet infrastructure, a strong gaming culture, technological innovation, government support, strategic partnerships, and changing consumer preferences.

Subscription Based Gaming Industry Overview

The gaming subscriptions market is fragmented with the presence of major players like Xbox (Game Pass), (Microsoft Corporation), PlayStation Now (Sony Corporation), Apple Arcade (Apple Inc.), Nintendo Switch Online (Nintendo Co. Ltd), and EA Play (Electronic Arts Inc.). Players in the market are adopting strategies such as partnerships and acquisitions to enhance their product offerings and gain sustainable competitive advantage.

- April 2024: Vodafone Idea announced a cloud gaming platform in collaboration with Paris-based CareGame, offering a selection of premium AAA games for subscribers. The service is being provided in a "try-n-buy" model with a free trial period, after which users have to pay a monthly subscription.
- October 2023: Sony bolstered its cloud gaming endeavors, offering PlayStation Plus subscribers the opportunity to stream renowned titles such as "Spider-Man: Miles Morales" and the highly-anticipated "Resident Evil 4" remake directly to their PlayStation 5 consoles in the weeks ahead. Additionally, the tech giant has hinted at the prospect of extending PS5 cloud gaming to various other devices, including smartphones, in the foreseeable future.

Additional Benefits:

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

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