

# BEYOND GAMING: WHAT YOU NEED TO KNOW

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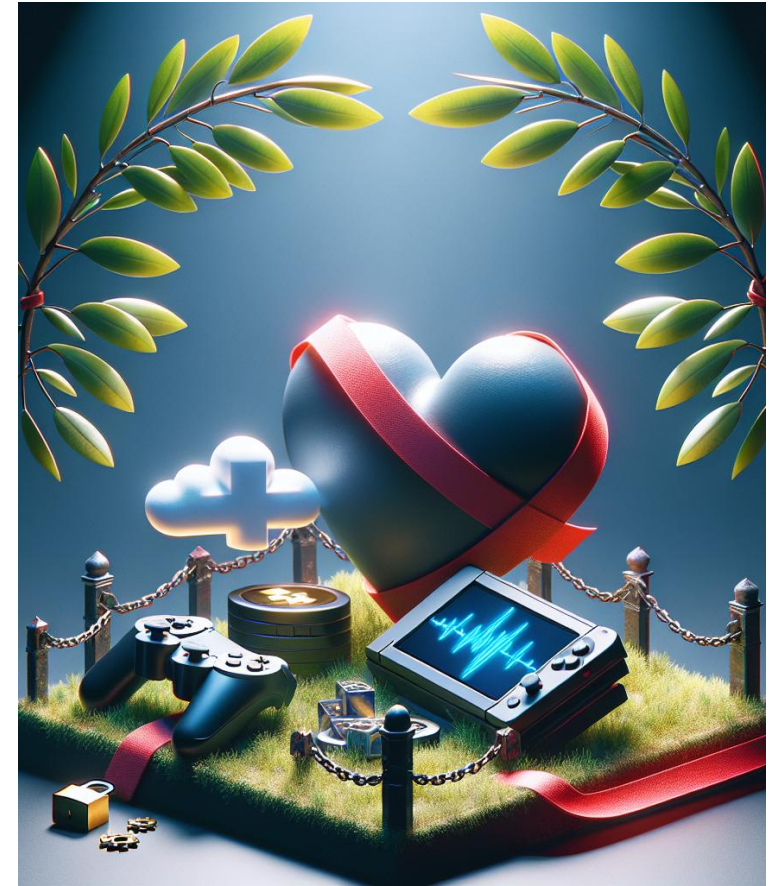
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June 2025

# What will today cover?





# Where does our Ipsos gaming knowledge come from?

## GAMETRACK

GameTrack (on behalf of Video Games EU) understanding of the video game audience and market revenue across EU5 countries.

## Ipsos Global Trends

Global results with a multilayered set of trends and forces that shape the world analysed through the eyes of the gaming audience.

## Trends Analysis

A close view of the signals, shifts and macro forces within the gaming ecosystem for each of the trend perceived from IGT.

### Why is it important for you:

Gaming audiences are expanding to broader demographics and understanding how they **evolve and change** to drive engagement and revenue, is key for each part of the video game industry.

### What are the insights:

As gaming audiences widen and data has become the usual trading currency for insights, **contextual information** has risen in relevance to understand and connect deeper with your gamers.

### What do they mean for you:

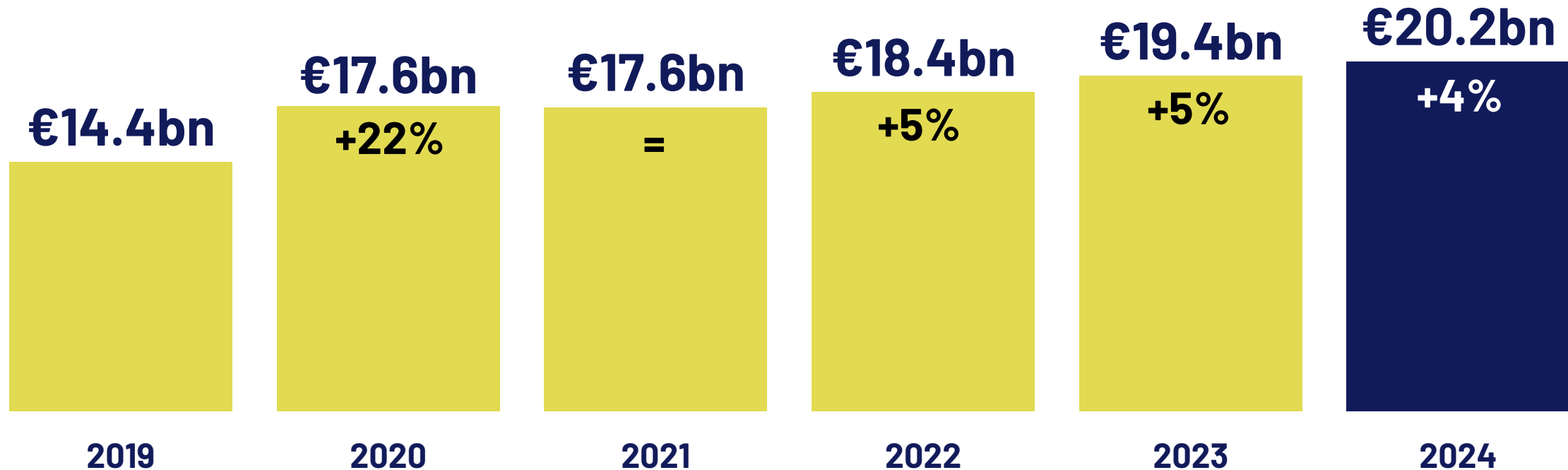
A vision of **signals**, small-scale expressions of change or, larger **shifts** within our society, which might be responses to long-term **macro forces** brought into the video game industry context.

**The video game industry will grow globally, keeping up with other entertainment industries**



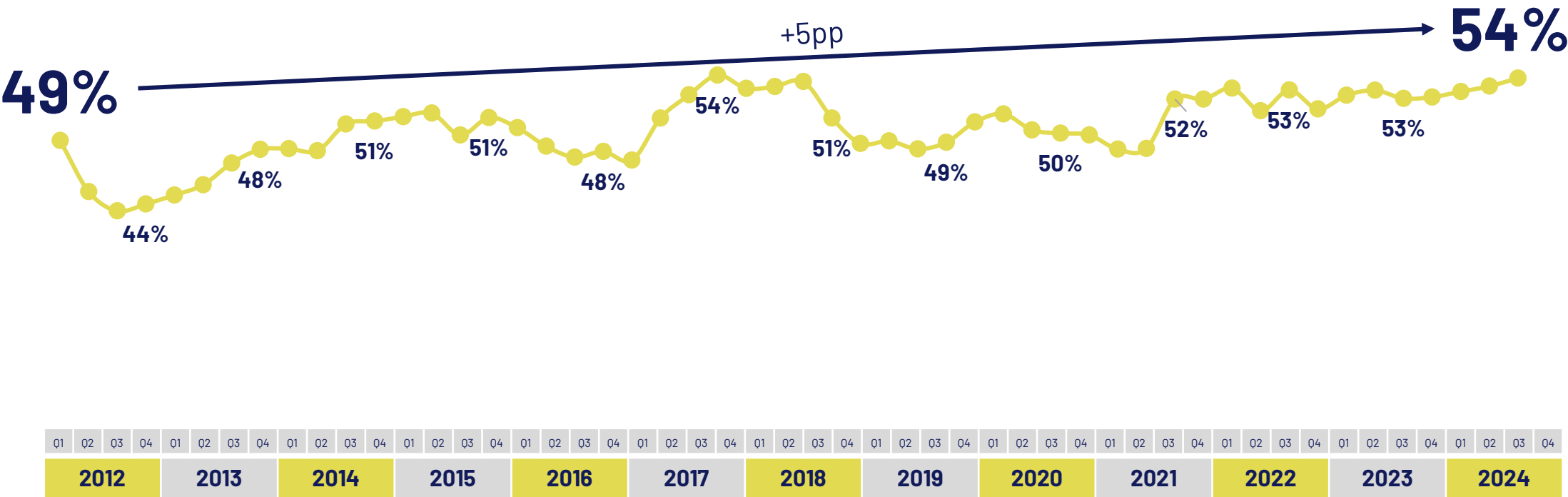
# Video game sales within Europe 5 countries have increased year-on-year

Estimated Full Year revenue – Video game sales



# Revenue has been driven by a rise in gaming adoption, with over half of the Europe5 population now playing games on any device

Reach of video games across Europe5 countries - % play on any device



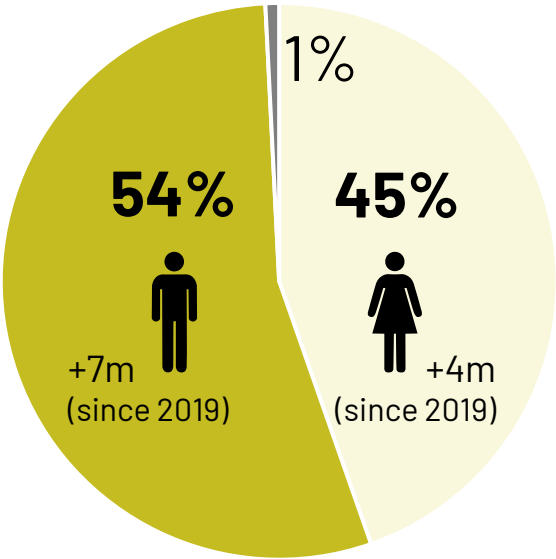
# Gaming has expanded to reach a far more varied player audience

Reach of video games by country - % play on any device EU5

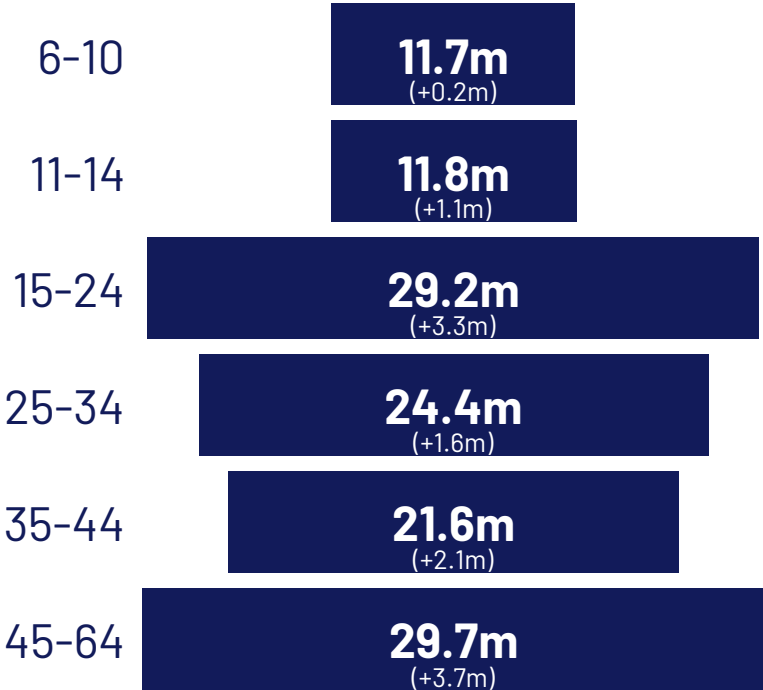
## By gender

**128m**  
gamers EU5

**+12m**  
(since 2019)

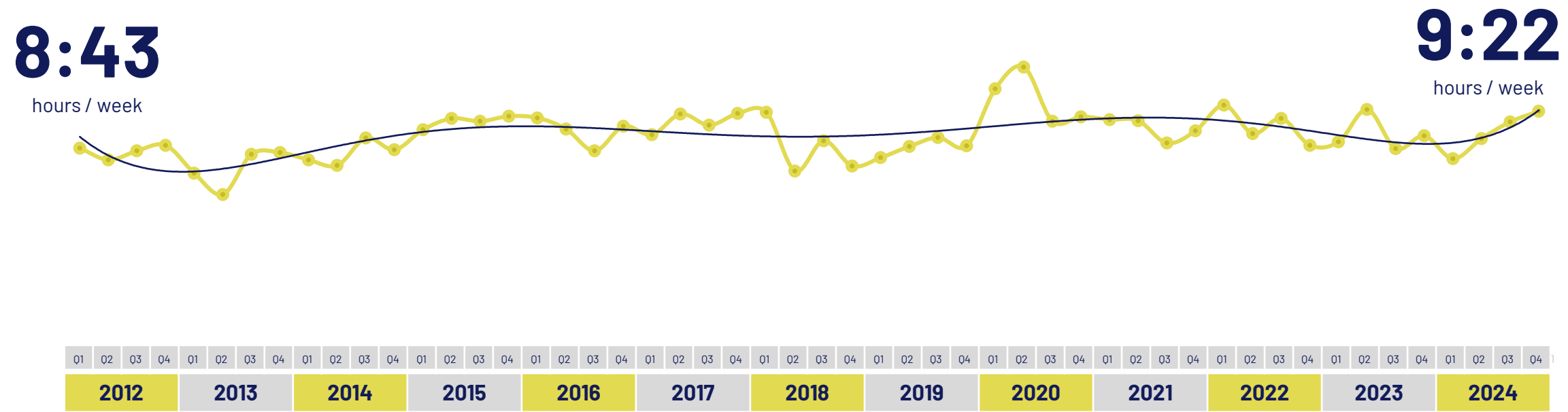


## By age



# And engagement with video games is very stable over time, despite far more complex and competitive media ecosystems

Gaming time (hours/week) – playing video games across devices Europe5

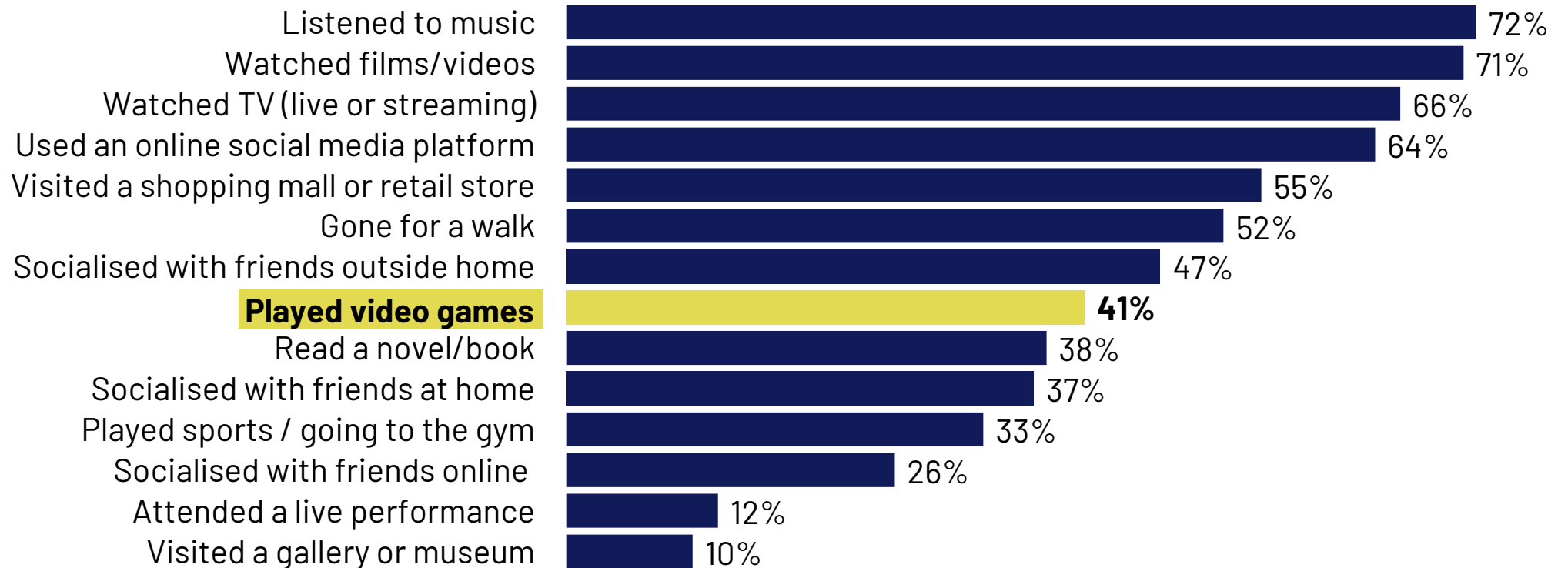




# Playing video games has become a relevant weekly activity; highly valued and comparable to 'socialising with friends' or 'reading a book'

## Weekly entertainment activities - Ipsos Global Trends 2024

### GLOBAL RESULTS



<https://www.ipsos.com/en/global-trends-2024>

Q. Which of the following have you done in the past week?

Base: All 15+ respondents (n=c.1,000 per year per country, 50,237)



**As gaming shifts rapidly,  
understanding gamers' mindsets  
becomes more important than ever**



## GLOBAL TRENDS

Globalisation Fractures

Splintered Societies

Climate Convergence

Technowonder

Conscientious Health

Retreat to Old Systems

Nouveau Nihilism

The Power of Trust

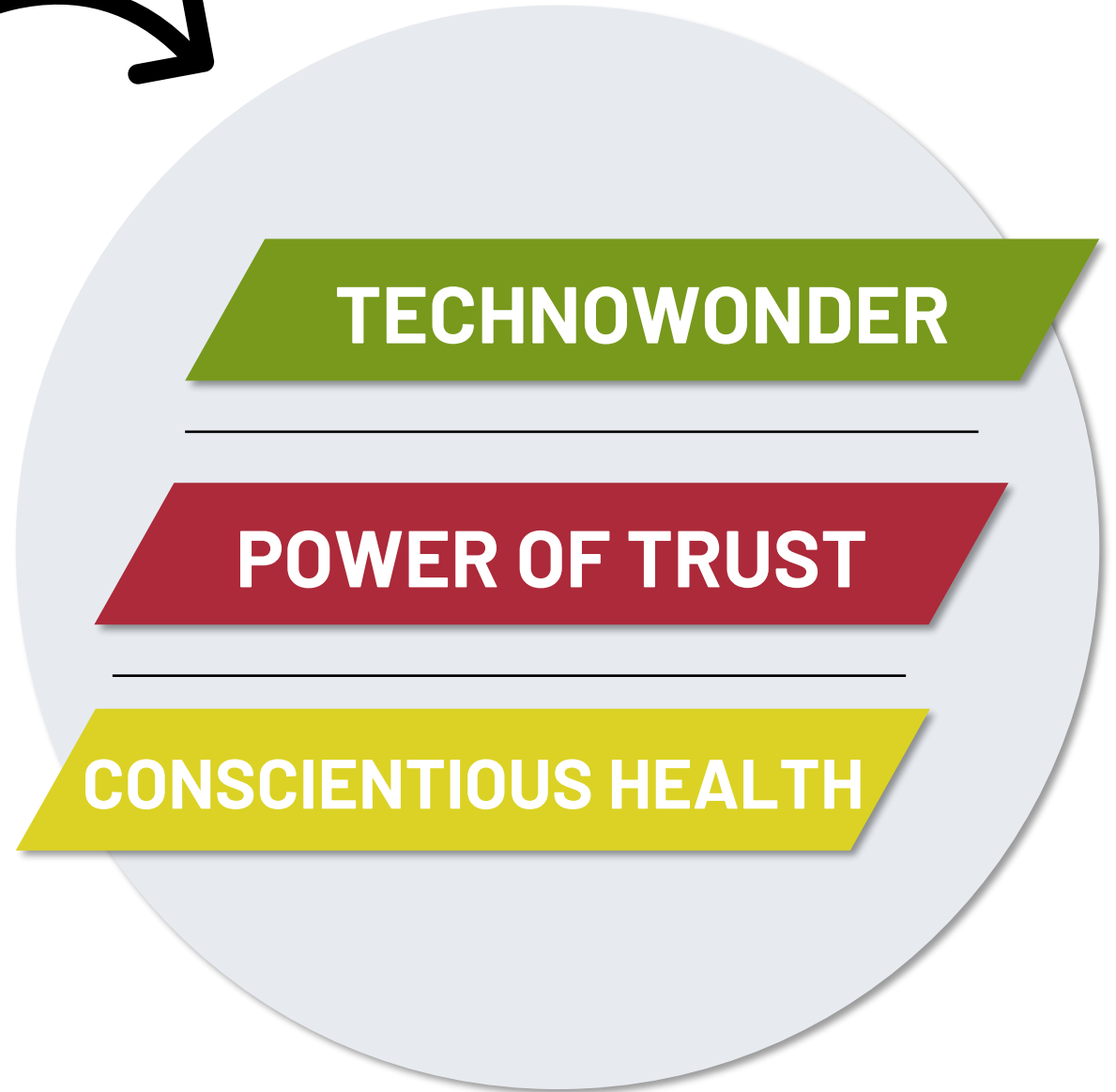
Escape to Individualism



# THREE KEY TRENDS

differentiate the  
voices of gaming  
audiences' the most

Let's explore how  
these attitudes may  
shape the landscape



# TECHNOWONDER

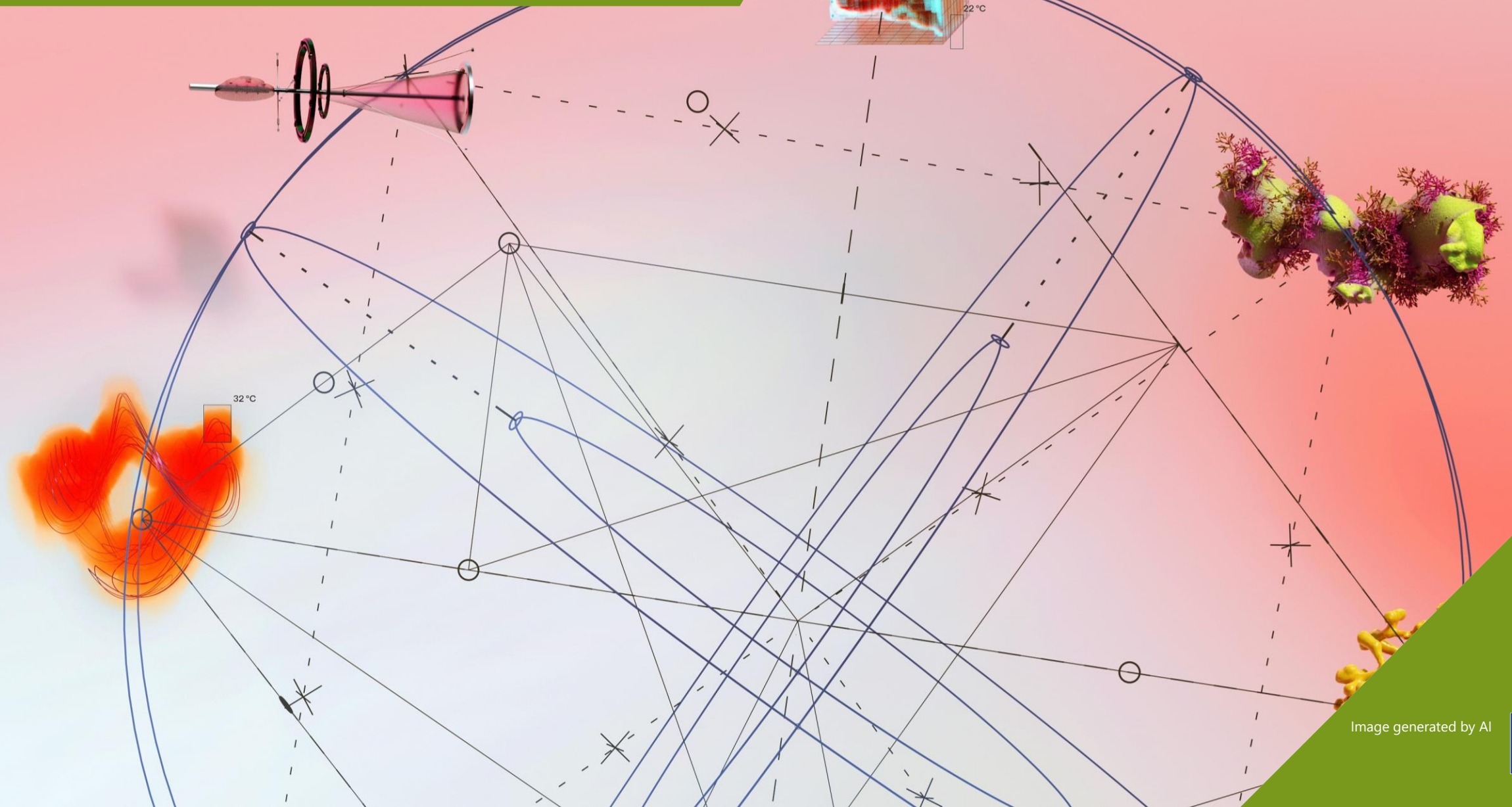
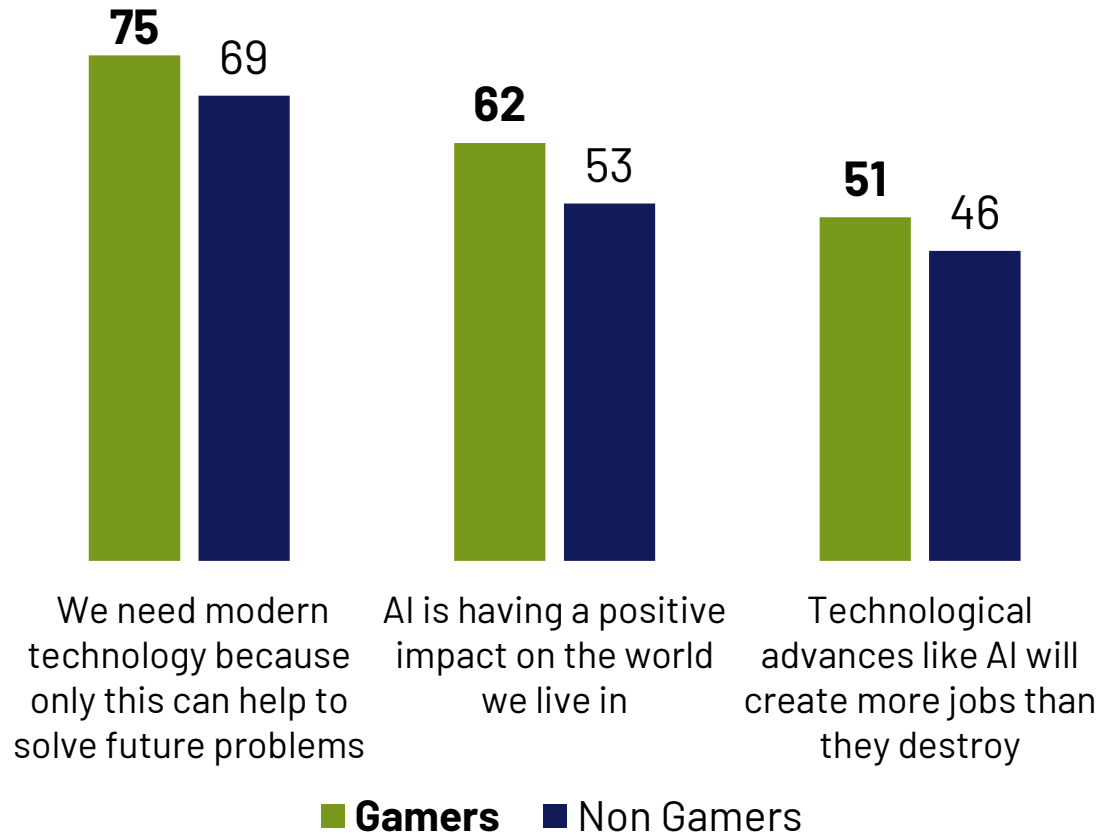


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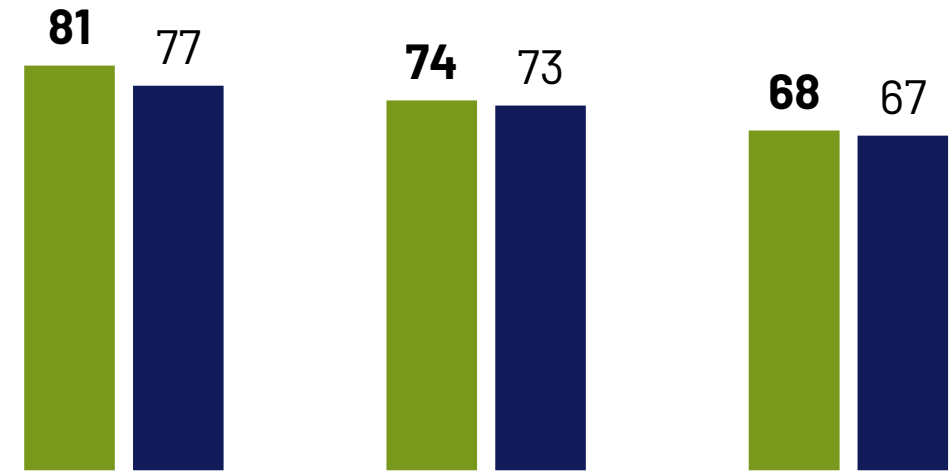


# Gamers are technological optimists and have high hopes for GenAI





## Gamers are equally concerned but more aware of the trade-offs



It is inevitable that we will lose some privacy because of what tech can do

I am concerned about how information collected about me is being used by companies

I am concerned about how information collected about me when I go online is being used by my own government

■ Gamers ■ Non Gamers



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# Gamers are cautiously excited for AI's potential to bring new wonder to gaming but the excitement is tampered by the side effects



**They have an  
appetite for  
genuinely new  
experiences**



**The community  
will stand up for  
human authorship  
& artistry**



**They worry that  
AI "slop" will  
further dilute  
content spaces**

# SO WHAT?

1

**Track the shifting lines of what is or isn't acceptable across AI**

2

**Integrate AI to not mimic human creativity but create entirely new experiences**

3

**Gamers are excited to experiment with new tech but need clarity on implications**

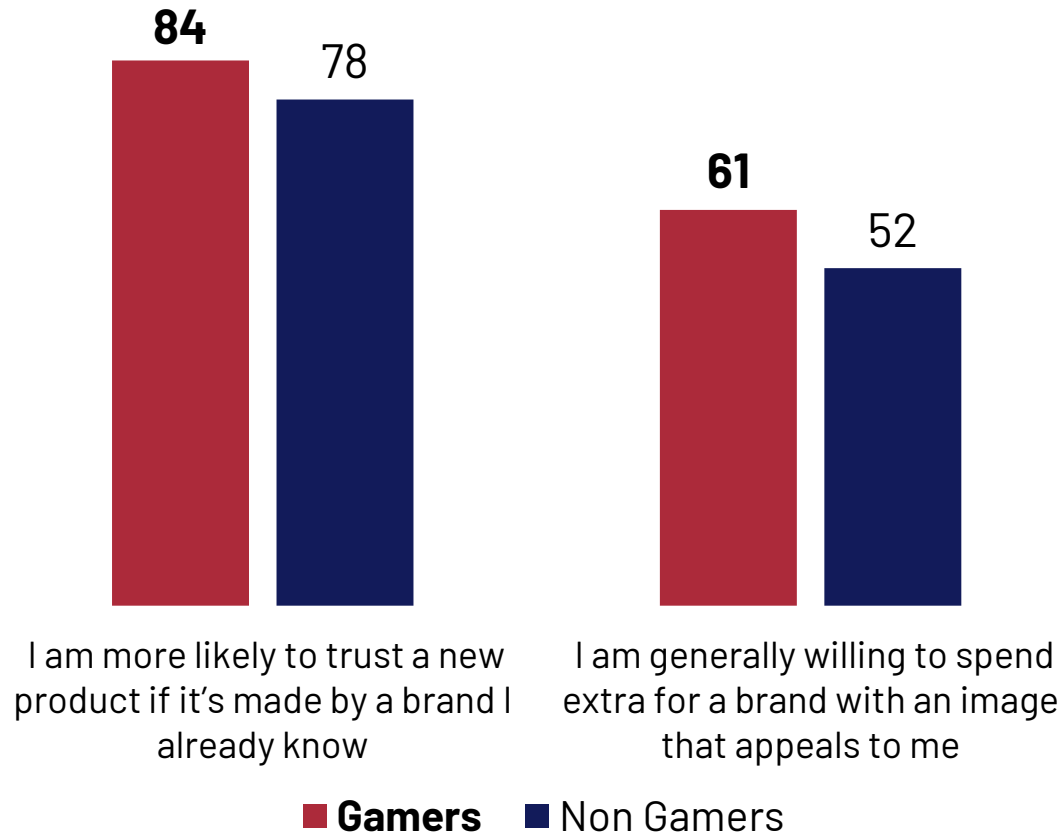


# POWER OF TRUST





# Trust is a make-or-break currency in the gaming ecosystem





# While industry turmoil and monetisation tension have eroded trust, building trust can be a competitive advantage



**A greater need for transparency and clarity of communication**



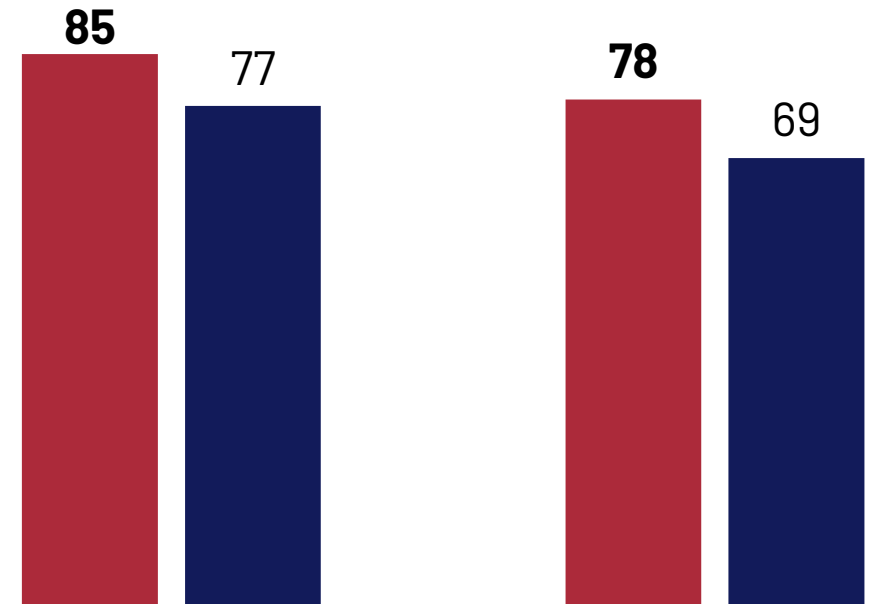
**Exposure to the people behind the games is driving trust**



**In the dialogue between players and developers, trust can be earned**



## Players seek trusted voices to cut-through a noisy marketplace



If I don't feel confident making a purchase, I will look at online reviews

I can find better deals shopping online than shopping in traditional stores

■ Gamers ■ Non Gamers



**In an increasingly saturated market, trusted voices are more important than ever but also more in flux than ever**



**Navigating the  
void left by  
traditional games  
media layoffs**



**The changing  
face of social  
discovery**

# SO WHAT?

1

**Trust is an important currency, consider how your actions build and erode trust**

2

**Understand how the ecosystem of trusted gaming sources is changing**

3

**Help cut through the complexity of games discovery**



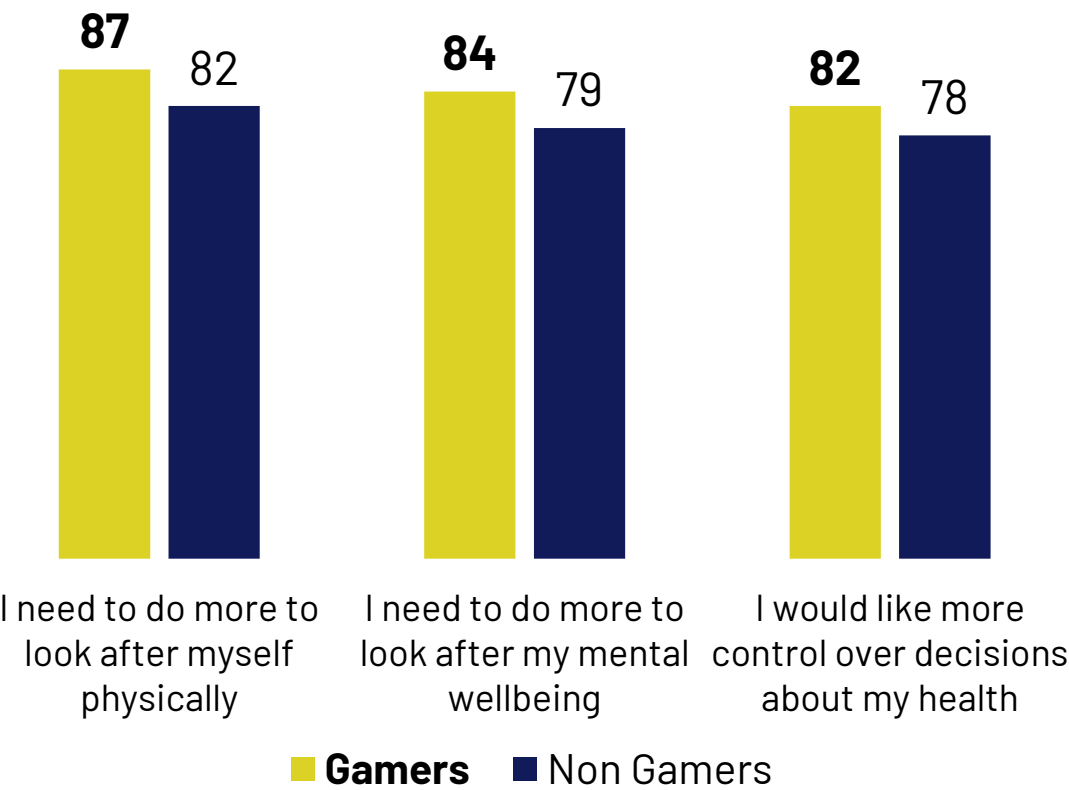
# CONSCIENTIOUS HEALTH

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# Mental and physical health are more relevant for gamers



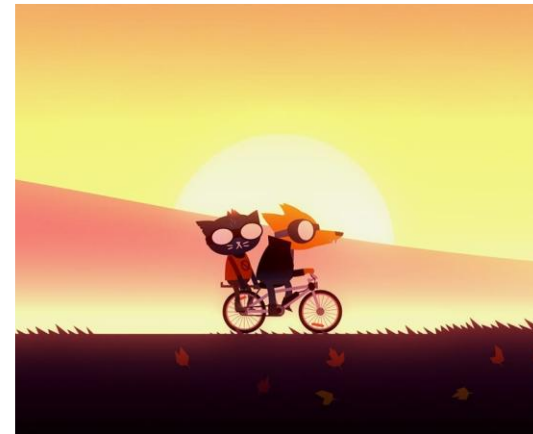
# While physical health remain a big gaming opportunity – new mental health positive gaming experiences drive growth



**“Cozy” games  
pave the way for  
new experiences  
and audiences**



**Tracking the next  
meaningful leap  
in fitness gaming**



**Shaping an  
ecosystem that  
protects gamers  
health**

# SO WHAT?

**1**

**Consider to what extent  
your brand can deliver  
mental wellbeing  
positive experiences**

**2**

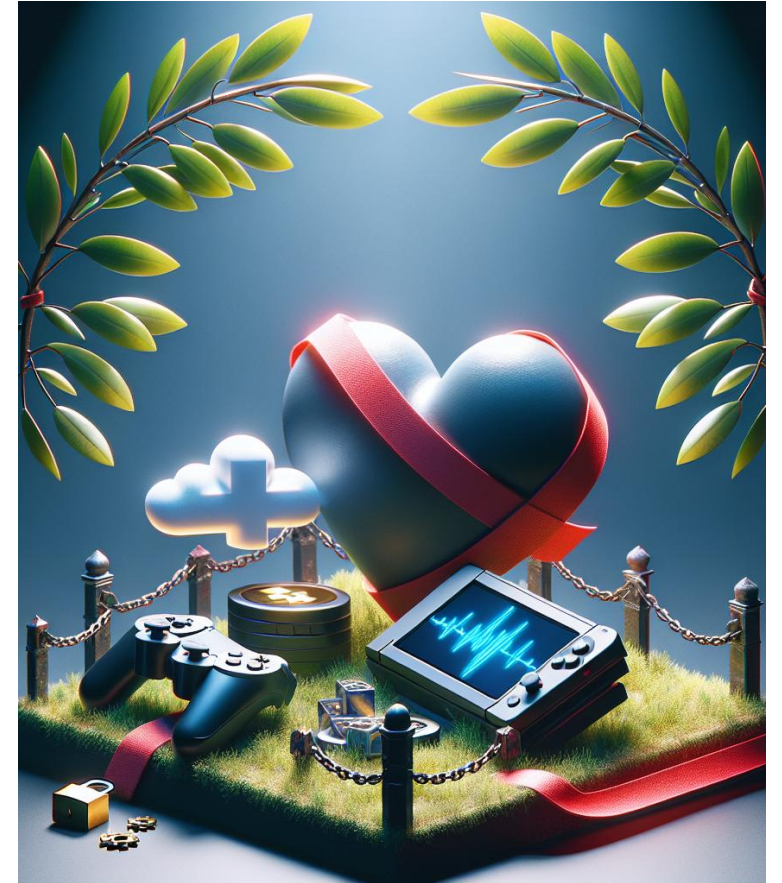
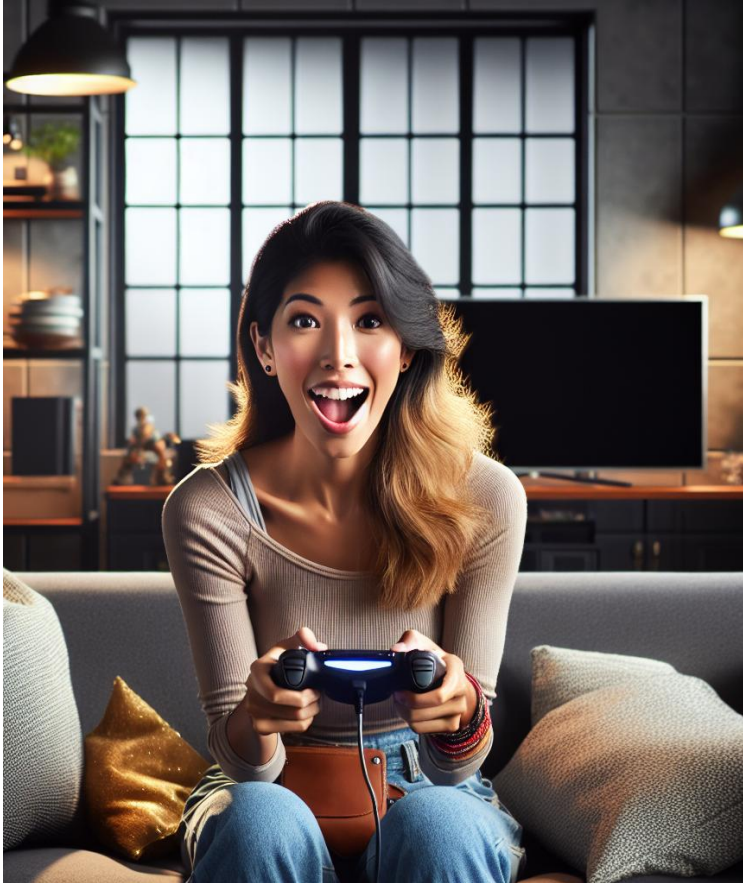
**Understand the role your  
brand plays in helping  
gamers set healthy habits  
and to protect them**

**3**

**Keep a finger on the  
pulse of tech to make or  
ride the next wave of  
gaming fitness**



# What we saw today:



**At Ipsos, we live gaming and work with gaming clients.  
We can help you to understand your gaming audiences further.**

Images generated by AI

# FOR MORE INFORMATION

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