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Video Games in the Cloud - A Disintermediated Video Game Industry

https://marketpublishers.com/r/V2EA234E1F4EN.html
Date: June 2015
Pages: 55
Price: US$ 2,200.00 (Single User License)
ID: V2EA234E1F4EN

Abstracts

This study focuses on all market segments of the video game industry impacted by the dematerialisation of distribution, specifically: home and handheld consoles, PCs (including laptops), mobile devices (smartphones, phablets & tablets) and TV sets. This report aims to measure the degree of dematerialisation affecting distribution in each of the market segments above, independently of the technology used. We take into account services carried out by key players on

Consoles: Microsoft, Nintendo & Sony for instance

PCs: Steam, GOG and similar competitors

Connected TVs through STBs, Pay-TV interfaces or as a 'stand-alone-service'

Finally, IDATE estimates the changes within the value chain for each market segment examined, with qualitative and quantitative data up to 2019.

Digitisation, a driver for disintermediation and growth in the video games sector
The global video game software market rose in value from 35.3 billion EUR in 2008 to 47.7 billion EUR in 2014, driven by digitisation, the emergence of new segments and the continued success of relatively new segments. Digitisation has meant an increasing number of consumers can be reached, on any platform equipped with a screen, fixed or mobile, and with increasingly varied content. In 2014, 69% of video game software revenues were generated by digital sales and distribution, compared with 22% in 2008. Revenues from digitisation have experienced an average annual growth of 26.8% over the period, compared with 9.7% for revenues from physical sales.

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