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China Digital Gaming Market (2018-2023)

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Abstracts

The China digital gaming market is fundamentally different from other digital gaming markets, particularly those of the western countries. Game censorship in China is extremely stringent, and regulatory bodies often ban the licenses of video games that are deemed inappropriate for the cultural development of young gamers. Despite such limitations, China has become one of the largest digital gaming markets in the world, and has grown exponentially in the past few years due to the popularity of mobile games and eSports in the country. According to Research on Global Markets, the China digital gaming market is expected to expand at a compound annual growth rate (CAGR) of 15.4% during 2018-2023, and reach a revenue of USD 83.79 Bn by 2023.

The China digital gaming market is classified into three segments—based on platforms (PC games, console games, and mobile games), revenue models (freemium, pay to play, and advertising), and game genres (shooter, role-playing, arena-fighting, and others [sports, adventure, strategy, etc.]).

Platform Segment Insights

China is a mobile-first country and has the world's largest mobile subscriber base. The average mobile user owns an affordable handset which allows them to play games on the go. With the increasing availability of reasonably priced yet high-performance smartphones, particularly from home-based brands like Xiaomi, Oppo, and Vivo, there is high growth potential for China's mobile gaming market. The mobile gaming segment is anticipated to expand at a CAGR of 20.6% through the forecasted period (2018-2023), and occupy a market share of approximately 74% by 2023. Surprisingly enough, post the lift of the 14-year ban on console games, China is expected to witness a significant boost in its console gaming segment, which is expected to grow at a double-digit CAGR during the 2018-2023 period. China-based Subor, which is credited with developing some of the country's first video game consoles, has already announced

the launch of the first high-spec video game console, The Subor Z+.

Revenue Model Segment Insights

Chinese gamers categorically demand free-to-play games and make limited in-app purchases. Therefore, the China digital gaming space is largely dominated by the freemium or free-to-play model. This segment is projected to expand at a CAGR of 15.5% during 2018-2023.

Game Genre Segment Insights

Although role playing games (RPG) held the largest market share of nearly 40% in the China digital gaming market, due to the availability of a large number of RPG games across PC and mobile platforms, the arena fighting segment is expected to witness a higher growth rate (33.7%) during the forecasted period (2018-2023). Arena games like Kings of Glory/Arena of Valor, League of Legends, etc. from the home company Tencent, have become immensely popular in the country in the last couple of years. Therefore, the current genre preference of gamers are expected to drive higher growth for the arena segment in the upcoming years.

Companies Covered

- Tencent
- Netease
- Kongzhong
- Shanda
- 37 Interactive

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