

# Southeast Asia Cloud Gaming Market: Current Analysis and Forecast (2025-2033)

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## Abstracts

Cloud gaming is the process of providing video game services using remote cloud servers in which game processing and rendering are centrally handled and streamed to consumers via the internet. Gamers can play high-quality games on various platforms without specialized game hardware.

The Southeast Asian Cloud Gaming market is expected to exhibit a growth rate of 30.46% during the forecast period (2025-2033F). The market can be mainly fuelled by the fast 5G network and fiber network growth, the high smartphone penetration, and the high and youthful population of gamers. The increasing data plan affordability and growing use of digital payments are facilitating the recurring subscription models. Cloud gaming is extending access to cost-sensitive consumers by its capability of removing costly hardware needs. Moreover, the increasing investment in local cloud and edge infrastructure also enhances the service stability, and cloud gaming becomes a viable alternative to the conventional gaming framework.

On 4 September 2025, Singtel and Tencent Games announced the launch of Honor of Kings ? Cloud (HoK ? Cloud) using Singtel's 5G network slicing technology. This world-first deployment employs Singtel's advanced 5G network to deliver dedicated, low-latency capabilities to enable smoother, more competitive game play for players at home or on the move. With this technology, players will no longer have to deal with heavy downloads or high-end hardware, as all intense processing and rendering takes place in the cloud, making it easier for players to game on any mobile device. Singtel's network slicing capability also boosts real-time processing across IoT devices and supports generative AI for smart glasses.

Based on device type, the market is segmented into smartphones, tablets,

gaming consoles, PCs & laptops, smart TVs, head-mounted displays, and others. Among these, the smartphones segment held the largest share in 2024. This is mainly due to the growing adoption of cloud gaming, which is highly affordable and accessible. The widespread adoption of mobile internet and the expanding 4G and 5G coverage enable users to access cloud gaming services without investing in high-end hardware. This mobile-first practice allows companies to scale fast and have access to mass-market users in urban and semi-urban locations.

Based on the offering, the market is segmented into infrastructure and gaming platform services. Among these, the gaming platform services market held the dominant share of the Southeast Asia Cloud Gaming market in 2024. The gaming platform services serve as the main source of revenues and engagement through the availability of subscription-based access to a variety of game libraries and cross-compatibility. Such services reduce barriers to entry among users with predictable recurrent revenues among providers. By integrating with telecommunications ecosystems and digital payment systems, platforms are improving customer retention and long-term market penetration.

Based on the solution type, the market is segmented into video streaming and file streaming. Among these, the file streaming segment is expected to grow at a significant CAGR during the forecast period (2025-2033). This is mainly because it allows hybrid models of gameplay that can reduce bandwidth load and enhance performance on variable networks. This method enables progressive streaming game assets at the cost of partial local processing, enabling cloud computing in areas where there is erratic connectivity. With the quality of the network, file streaming assists firms in optimizing expenses and reaching even outside the premium network areas.

For a better understanding of the market adoption of the Southeast Asian Cloud Gaming market, it is analyzed based on its regional presence in Southeast Asia, including Indonesia, Thailand, the Philippines, Vietnam, Malaysia, Singapore, and the Rest of Southeast Asia. Singapore is expected to grow at a significant rate, driven by the growth of the cloud gaming industry, supported by its advanced digital infrastructure and the deployment of 5G and high-speed fiber networks. The market has high internet reliability and low latency, which is ideal for testing and scaling high-quality cloud gaming services. Also, the high purchasing power and the high use of subscription-based digital services contribute to the increased average revenue per user (ARPU) relative to peers

in the region. Moreover, the country is a cloud and data center hub in the region, and companies can leverage it as a platform to expand their presence across Southeast Asia. For example, on November 11, 2025, Tencent announced several new strategic partnerships at Tencent Cloud Day Singapore 2025, reaffirming its commitment to building a collaborative AI ecosystem that empowers businesses, institutions, and communities across the Asia Pacific. Themed “AI-Powered Global Opportunities,” the event brought together industry leaders, partners, and clients to explore how AI-powered technologies are reshaping industries and unlocking new avenues for sustainable growth. It is held a day before the Singapore Fintech Festival 2025.

Some major players running in the market include Microsoft, NVIDIA Corporation, IBM, Tencent Cloud, VNG Cloud (VNG Corporation), Sony Group Corporation, Blacknut, True Digital Group Company Limited, gameQoo, AirConsole (KPIT).

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