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Gaming Industry Report

Q1 2024



Gaming industry: at a glance

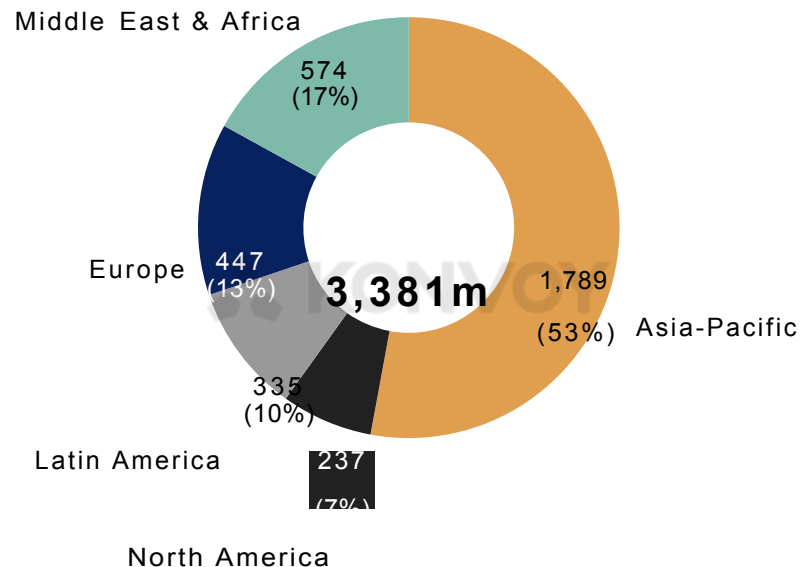
- **2024 market size:** \$189.3b (+2.9% YoY)
- **Public markets:** leading public gaming ETFs up 4-12% YTD (vs S&P 500 = 10.7%)
- **Venture funding in Q1' 24:** \$594m across 124 rounds (funding is +94% QoQ, number of rounds are +28% QoQ)

Key Trends

- Emerging IPO candidates in gaming
- Potential US TikTok ban
- Disney invests in Epic Games
- App Store sees increased scrutiny
- Apple Vision Pro: limited gaming use cases
- The rise of the indie developer

Source: CB Insights, Newzoo, public reporting, Drake Star

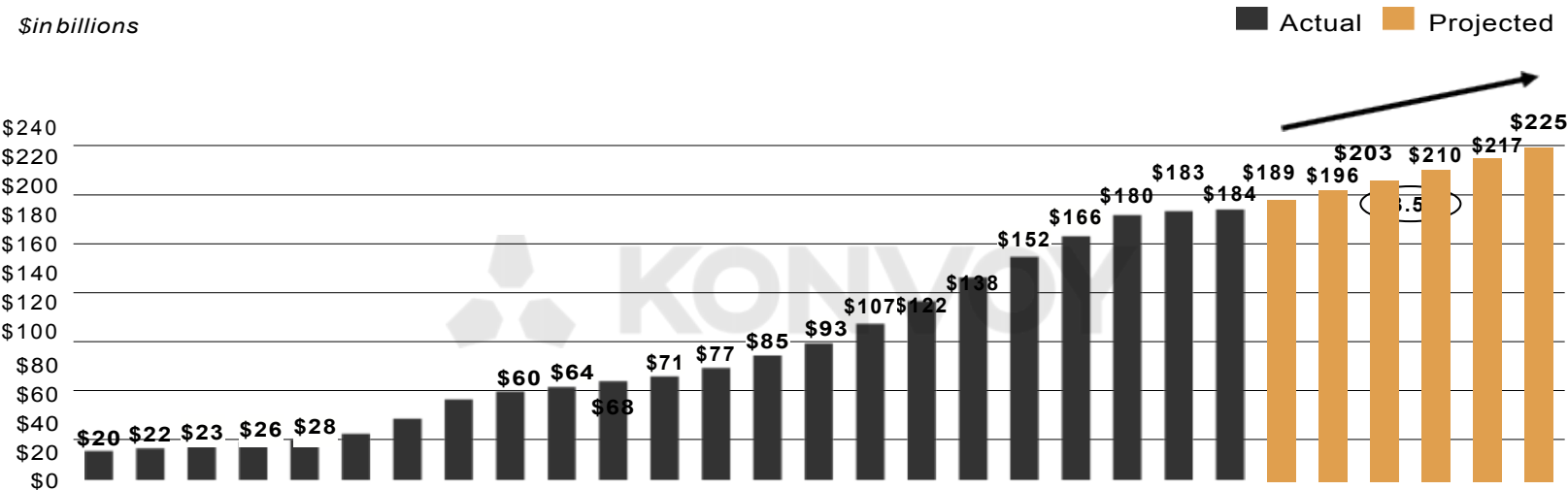
Total gamers in 2023 by region (millions):





Gaming is expected to be a \$189b market in 2024

\$inbillions



2001 2003 2005 2007 2009 2011 2013 2015 2017 2019 2021 2024 2029

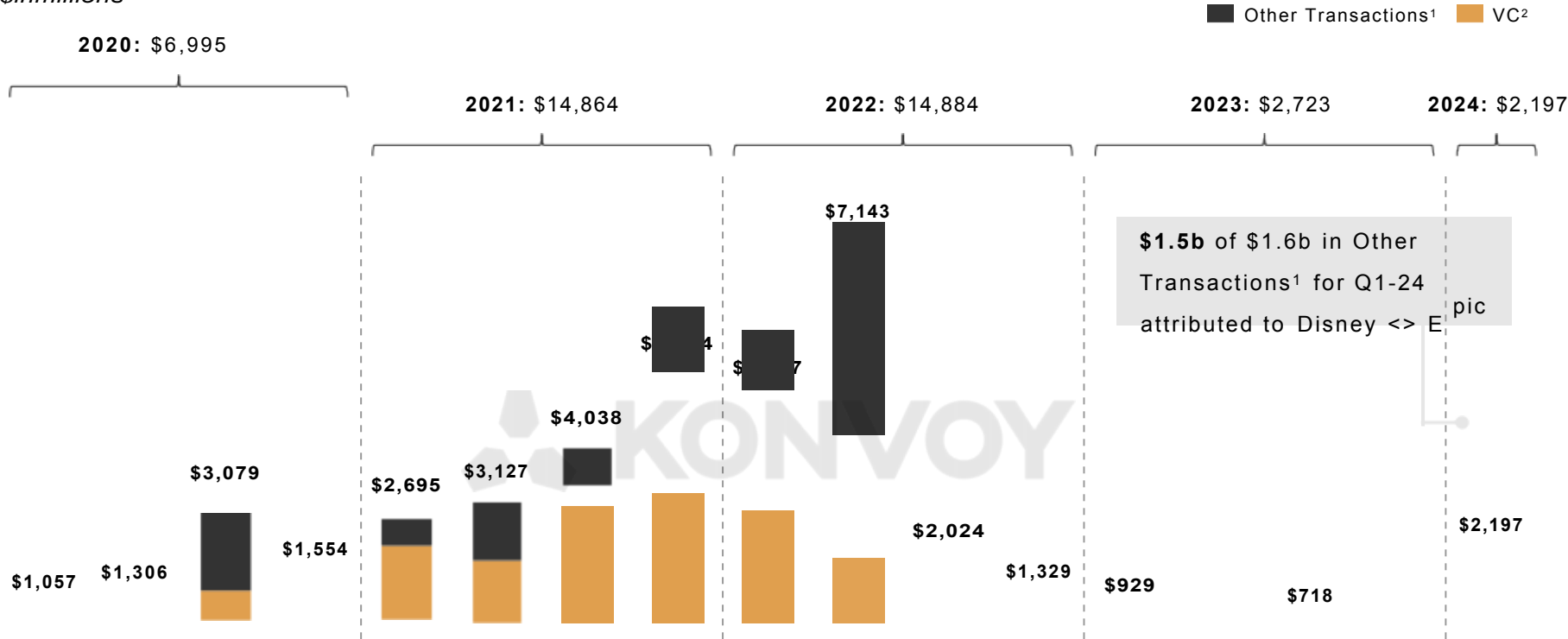
Source: IFPI, Newzoo, Arstechnica, MPAA, Mordor Intelligence, Konvoy

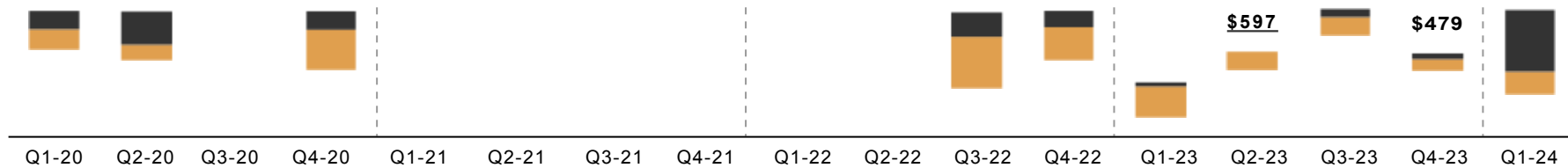


Gaming funding: private markets overview

Strong Q1 private market performance is driven by Disney <> Epic (\$1.5b)

\$in millions





1: Includes transactions such as Private Equity, Growth Equity, Corporate Minorities, PIPEs, and others. This excludes M&A; 2: VC includes Pre-Seed through Series K VC; Note: Historical data across reports is subject to change, as source adds new deals as they become public; Source: CB Insights

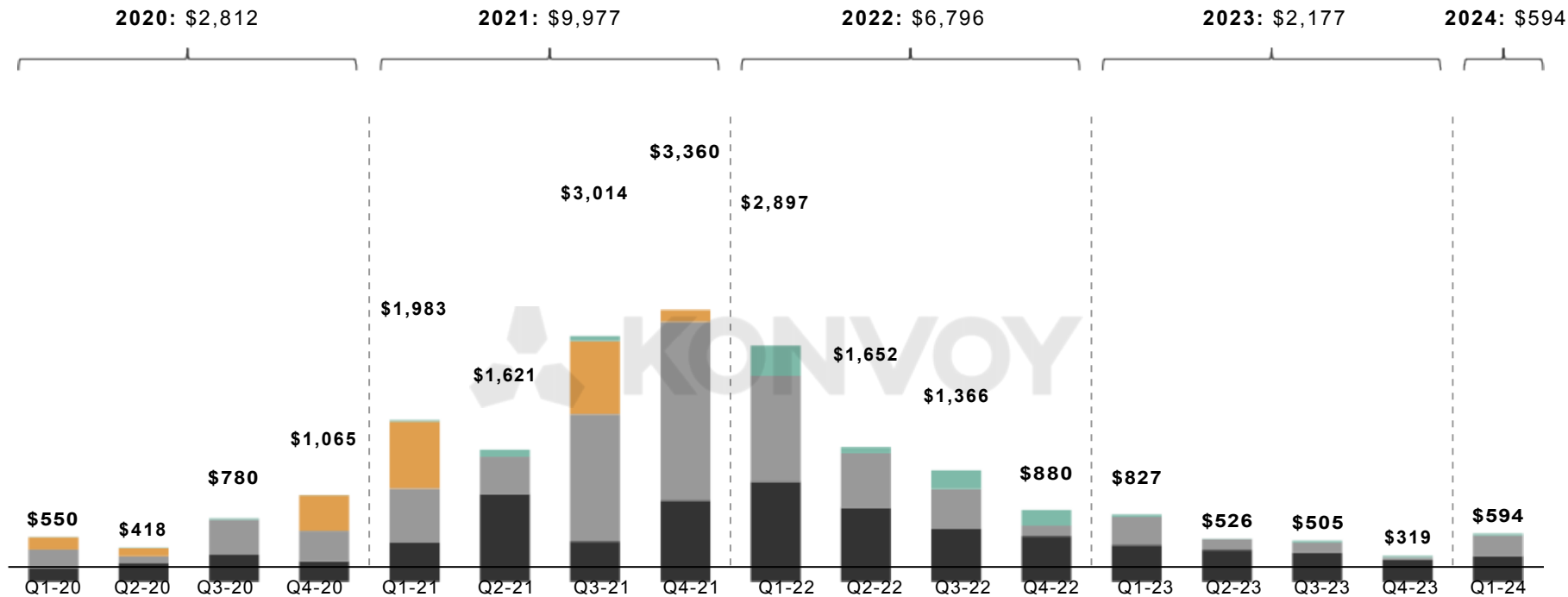


Gaming VC funding: \$594m (+94% QoQ) in Q1-24

Early and Growth VC funding has normalized to pre-COVID levels, Late remains absent

\$inmillions

Unattributed VC Late Growth Early



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