2023 GAME INDUSTRY WHITE PAPER

SUMMARY

ENGLISH / 中文

Game

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Part 1. Introduction

In 2022, the domestic gaming market was valued at USD 17,195 million, reflecting a 5.8% increase from 2021 (6.3% decrease in dollars due to rise in exchange rate). The domestic gaming industry had growing steadily over the last 10 years, except for a 0.3% decline in 2013. The growth rate, which had been more or less stagnant, increased in 2020 due to the outbreak of COVID-19, but slowed down as the recovery from the pandemic began.

Regarding game production and distribution companies, based 2022 revenue, mobile gaming accounted for USD 10,118 million (market share: 58.9%), the largest share of the entire gaming market this year following the previous year. PC gaming amounted to USD 4,493 million(market share: 26.1%), showing a slight decrease compared to last year, and sales increased by 3.0% compared to the previous year.

Considering other platform games, console games had a market share of 5.1% and revenues of USD 867 million(6.4% up), both of which increased slightly from the previous year. The market share of arcade games was 1.3%, the same as the previous year, but revenues increased by 8.9% compared to the previous year to USD 230 million. Next, computer game room operation business (PC Room) revenues increased slightly to USD 1,453 million from the previous year, but market share decreased slightly from the previous year to 8.4%. Amusement arcade operation business had a market share of 0.2%, the same as the previous year, but revenues slightly increased to USD 34 million.

The CAGR(compound annual growth rate) by sector increased in general, but in detail, PC gaming, mobile gaming, console gaming, and arcade gaming in game production and distribution businesses increased by 3.0%, 7.6%, 6.4%, and 8.9%, respectively, and computer game rooms (PC Room) and amusement arcades (Gaming Arcade) increased by 1.9% and 10.4%, respectively.

In 2022, domestic gaming industry’s exports amounted to USD 8,981.75 million (KRW 11,604 billion, applying the 2022 average annual basic rate of exchange rate of KRW 1,291,95 as announced by the Bank of Korea), a 3.6% increase from the previous year. In addition, imports amonted to USD 60.163 million, a 16.7% decrease from the previous year, equivalent to approximately KRW 336.1 billion.

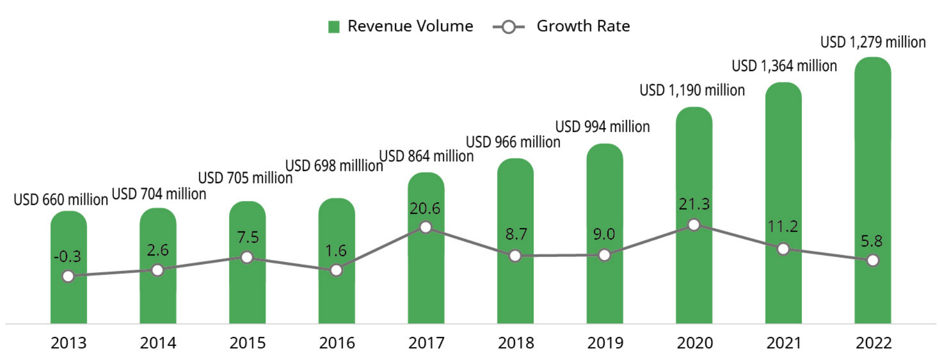
1. Gaming Industry Trends in 2022

1-1. A 5.8% YoY Growth in the Domestic Gaming Market in 2022, Amounting to KRW 17.195 Billion in Revenues

In 2022, the domestic gaming market size was worth USD 17,195 million, an 5.8% increase compared to 2021. The domestic gaming industry also recorded 21.3% growth rate in 2020 due to increased work from home hours after the COVID-19 outbreak, and grew to 11.2% in 2021 and 5.8% in 2022. The growth rate is slowing down but it shows that the industry is growing in size.

Figure 1 Total Size and Growth Rate of the Domestic Gaming Market(2012~2021)

(Unit: USD Million, %)



1-2. Mobile Gaming Market Amounts to USD 10,118 million, Accounting for 58.9% of the Total Gaming Industry Revenues

As the trend towards higher specifications of smartphones continues globally, the growth trend of mobile games is also expected to continue. In 2022, the market size of the mobile game market amounted to USD 10,118 million, showing 7.6% increase from the previous year. Mobile games accounted for 49.7% of the total share of the domestic game industry in 2019, 57.4% in 2020, 57.9% in 2021, and 58.9% in 2022, indicating that it has continuous increased regardless of COVID-19. As the game development trend in the domestic game industry is oriented toward multi-platform rather than a specific platform, it can be expected that mobile games will continue to grow.

PC games, one of the two major axes of domestic games, have a market size of USD 4,493 million, growing 3.0% compared to the previous year. The size of PC games, which decreased by 4.3% in 2019 before the outbreak of COVID-19, showed a positive growth rate from 2020 to 2022 due to the benefit of the preferred non-face-to-face period due to COVID-19, but the market share of the games market remained at around 26%, exposing the limitation of growth.

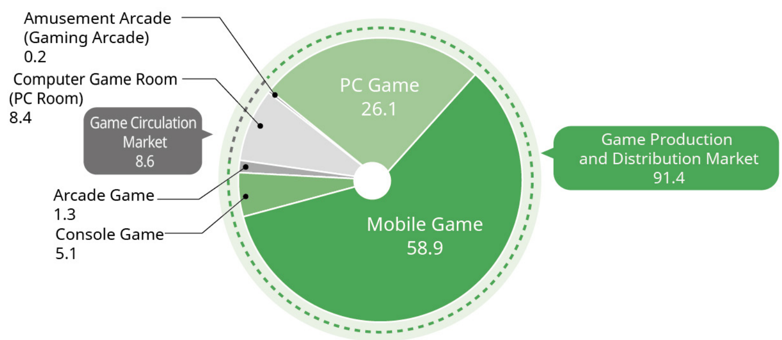
Console gaming sales in 2022 amounted to USD 867 million, a 6.4% YoY increase, with a market share of 5.1%, similar to the previous year. Compared to the 3.7% decline in the period when there was a game console crisis due to the inability to purchase console game devices such as Play Station in 2021, it can be said that there were no special market-related issues for console game machines or game software in 2022.

Arcade games had a market size of USD 230 million in 2022, growing by 8.9% compared to the previous year, but their market share is only 1.3%, the same as the previous year. Since the market size itself is small, the development of new gaming devices is not easy to detect and although it can be seen that the industry that was most affected during the COVID-19 period has entered a recovery period, it is difficult to say that growth is expected in the long term.

On the other hand, game distribution businesses, such as PC bangs and gaming arcades, began to recover in 2022 due to the base effect of the severe market contraction caused by the COVID-19 outbreak in 2020. However, PC rooms showed a growth rate of 1.9%, which is not much better than 2.4% in 2021 while the arcade game market is considered to have entered a recovery period to some extent as its growth rate in 2022 was 10.4% although its market size is very small at $34 million. However, it is highly likely that the growth will coincide with the revitalization of complex businesses such as theater chains rather than it is a turning point anticipates a period of independent growth in the future.

Figure 2 Domestic Gaming Market Share by Field

(Unit: %)



1-3. Domestic Game Market Growth Expected to Face Increasing Instability for Some Time

The size of the domestic gaming market in 2023 is expected to decrease by approximately 10.9%, compared to 2022, and to amount to USD 15,160 million in value. The decrease in the size of the gaming industry is a result of the decrease in time spentat home in the post-COVID-19 period and the increase in other entertainment that can be enjoyed as an alternative. It can be seen as a process in which the economic slump caused by the interest rate hike is becoming a reality.

The size of the total game market rapidly increased to a growth rate of 21.3% in 2020 due to the outbreak of COVID-19, but the growth rate is gradually decreasing and it can be considered as a stabilization phase. In 2023, the size of the domestic gaming market is expected to decrease by about 10%, as shown above, due to the recent emergence of alternative entertainment such as Netflix and OTT, which will offset the sales of the gaming market. With many factors affecting the situation simultaneously, the outlook for the future growth rate of the gaming market has entered a difficult period. However, it will be possible to outline trends and prospects for each platform depending on the characteristics of the game platform.

Table 1 Domestic Gaming Market Size and Outlook (2019–2022)

(Unit: USD Thousand, %)

Division	2019		2020		2021		2022	
	Revenues Volume	Growth Rate	Revenues Volume	Growth Rate	Revenues Volume	Growth Rate	Revenues Volume	Growth Rate
PC Game	4,122,850	-4.3	4,153,383	2.0	4,925,901	15.0	4,493,440	3.0
Mobile Game	6,639,986	16.3	9,178,509	39.9	10,615,246	12.2	10,118,039	7.6
Console Game	595,805	31.4	925,808	57.3	919,243	-3.7	866,597	6.4
Arcade Game	191,824	20.6	192,534	1.6	238,811	20.3	230,349	8.9
PC Room	1,750,869	11.6	1,522,817	-11.9	1,608,500	2.4	1,452,533	1.9
Gaming Arcade	60,310	2.4	30,931	-48.1	34,603	8.6	33,902	10.4
Total	13,361,644	9.0	16,003,983	21.3	18,342,304	11.2	17,194,860	5.8

1) For the conversion of sales into dollars, the Bank of Korea's average annual exchange rate (base exchange rate) by year is applied, and the year-on-year and average annual increase/decrease rates are based on the Korean won.

While the PC games industry is likely to maintain the status quo due to loyal customers although multi-platform development is not favorable to PC games and mobile games are continuously increasing their share of the game industry according to megatrends, it seems that the growth rate will be affected by the circumstances of the entire economy. Console games are expected to be strongly affected by the release of successful games such as <Lies of P> and the marketing strategies of console game device manufacturers in an oligopoly as game developers avoid the competitive situation of mobile games through open markets or pursue niche markets.

Arcade games and game rooms, which have a minimal presence in our game market, are expected to continue to be influenced by the entertainment trend of generations who enjoy arcade games without any particular turning point. PC rooms, the area related to game distribution, are expected to face difficulties in showing progress as the reason to visiting PC rooms is low, as the rate of owning high-end PCs ownership at home has progressed significantly.

1-4. Exports to Reach USD 8,981.75 Million in 2022, with a 3.6% YoY Increase

In 2022, the domestic game industry's exports increased by 3.6% YoY, amounting to USD 8,981.75 million. Applying the annual sales standard of KRW 1,291.95 in 2022 based on the KRW-USD exchange rate announced by the Bank of Korea, it is approximately equivalent to KRW 11.604 trillion. In addition, the import value also increased by 16.7%, amounting to USD 260.16 million, which is approximately KRW 336.1 billion.

Table 2 Export Status of the Domestic Game Industry(Last 7 Years)

(Unit: USD Thousand, %)

Division		2016	2017	2018	2019	2020	2021	2022
Export	Amount	3,277,346	5,922,998	6,411,491	6,657,777	8,193,562	8,672,865	8,981,751
	Change Rate	2.0	80.7	8.2	3.8	23.1	5.8	3.6

Table 3 Import Status of the Domestic Game Industry(Last 7 Years)

(Unit: USD Thousand, %)

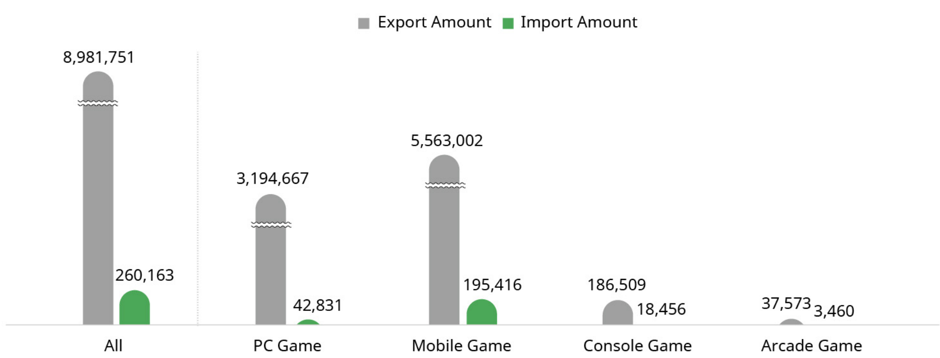
Division		2016	2017	2018	2019	2020	2021	2022
Import	Amount	147,362	262,911	305,781	298,129	270,294	312,332	260,163
	Change Rate	-17.0	78.4	16.3	-2.5	-9.2	15.3	-16.7

Looking at the the export and import volumes by game platforms, the export scale of mobile games was the largest, worth USD 5,563.2 million. The export volume of PC games amounted to USD 3.194.66 billion. Comparing the export scale with that of the previous year, most platforms showed increase, while arcade games showed 6.6% decrease from the previous year.

In terms of import scale, mobile games recorded the largest figure, USD 195.416 million, followed by PC games with USD 42.831 million. While most platforms showed huge drop compared to the previous year, PC games showed 5.4% increase from the previous year. In particular, sales of console games (48.3% down from the previous year) and arcade games (66.3% down from the previous year) decreased sharply.

Figure 3 2022 Export/Import Scale by Domestic Game Platform

(Unit: USD Thousand)

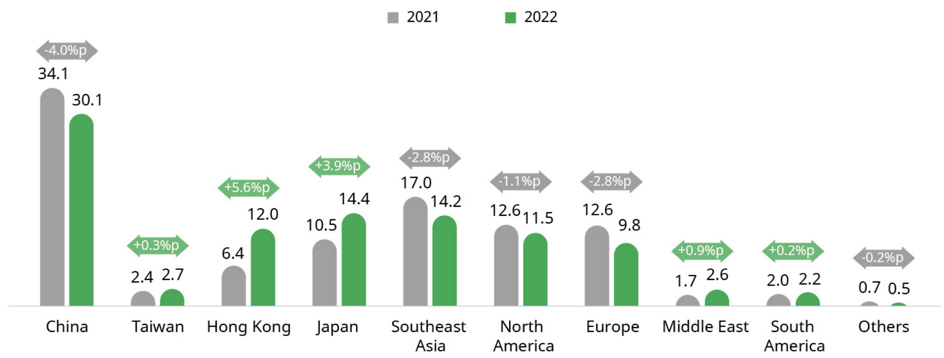


In terms of the share of domestic game exports by major countries, "China" had the highest share at 30.1%, followed by "Japan" (14.4%), "Southeast Asia" (14.2%), "Taiwan" (12.0%), "North America" (11.5%), and "Europe" (9.8%).

Comparing the share of domestic game exports by countries in 2021, the share of exports to "Taiwan" increases strongly, while the share of exports to "China" decreases sharply by -4.0%.

Figure 4 Comparison of the Share of Domestic Game Exports by Country (2021-2022)

(Unit: %)



1-5. Korea Has a 7.8% Share of the Global Game Market

Looking at Korea's status in the global game market through a comparison of major countries, Korea ranked fourth in the world. The share is increasing as it maintains its fourth place ranking in 2020 (6.9%), fourth place in 2021 (7.6%), and 7.8% in 2022. Countries with larger gaming markets than Korea are the United States in first place, China in second place, and Japan in third place. The remaining rankings from fifth to tenth remained the same as in 2021, with the UK in fifth place, Germany in sixth place, France in seventh place, Italy in eighth place, Canada in nineth place, and Taiwan in tenth place.

Looking at each platform, existing continental characteristics are maintained, such as the relative strength of console games and arcade games in North America and Europe, and the relative strength of PC games and mobile games in Asia. However, looking at the details, console games have relatively decreased or stagnated in the North American and European markets, but are expanding in size in the Asian market.

The PC game market size was calculated to be USD 36.3 billion. Korea was in second place after China until 2018, but has been ranked third after the United States in 2019, 2020, 2021, and 2022. In 2021, Korea’s share was

13.2%, an increase compared to the previous year, while the proportion in 2022 fell to 12.7%. The market size also decreased to USD 4.6 billion compared to USD 4.9 billion in 2021.

In the mobile game market, Korea's global market share has continued to steadily rise from 9.1% in 2019 to 10.3% in 2020 and 10.6% in 2021. In 2022, the proportion expanded to 11.4% and the ranking also rose. The ranking, which was fourth in 2021, surpassed Japan and took third place in 2022.

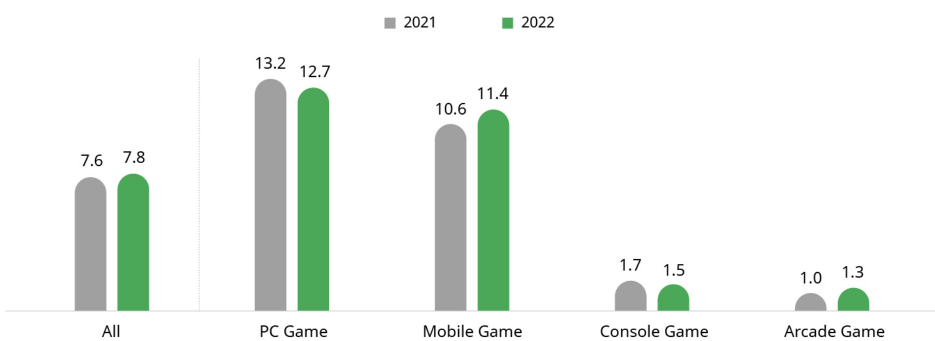
Table 4 2022 Share of the Domestic Game Market in the Global Market (Based on Sales Volume)

(Unit: USD Million, %)

Division	PC Game	Mobile Game	Console Game	Arcade Game	All
Global Gaming Market	36,352	91,681	59,141	21,076	208,249
Domestic Gaming Market	4,632	10,430	893	272	16,227
Market Share	12.7	11.4	1.5	1.3	7.8

Figure 5 Comparison of the Domestic Game Market Share in the Global Market

(Unit: %)



1-6. 1,287 Production/Distribution Companies, 8,485 PC Rooms, 500 Gaming Arcades, and 84,347 Workers

As of 2022, there were 1,287 game production and distribution companies. It was also estimated that there were 8,485 PC bangs and 500 gaming arcades. The total number of workers in the game industry in 2022 stood at 84,347, a 3.0% decrease from 81,856 workers in 2021. The number of workers in the game production and distribution business accounted for 57.5% of the total number of workers. The number of workers in the game circulation business stood at 35,833, accounting for 42.5% of the total number of workers.

The number of workers in the game production and distribution business in 2022 increased by 7.2% from 48,514 to 45,262 compared to the previous year. The number of workers increased across all game platforms, except for the arcade game platform. The console game sector increased significantly by 72.3%, compared to the previous year.

The number of workers in the game distribution business(PC bang and gaming arcade) decreased by 2.1% YoY, from 35,833 to 36,594. The number of workers in the PC bang business decreased by 2.9%, but that of gaming arcades increased by 30.0%.

Table 4 Number of Game Industry Workers(2019~2022)

(Unit: Person, %)

Division		2019	2020	2021	2022	2022 Composition	YoY Change Rate from 2020
Game Production / Distribution Companies	PC Game	13,430	14,600	13,124	15,024	17.8	14.5
	Mobile Game	23,057	27,028	29,015	30,113	35.7	3.8
	Console Game	1,348	1,110	1,204	2,075	2.5	72.3
	Arcade Game	1,555	1,572	1,919	1,302	1.5	-32.2
	Subtotal	39,390	44,310	45,262	48,514	57.5	7.2
Game Circulation	Computer Game Room Operation (PC Room)	48,810	38,154	35,738	34,715	41.2	-2.9
	Amusement Arcade Operation (Gaming Arcade)	957	839	856	1,118	1.3	30.6
	Subtotal	49,767	38,993	36,594	35,833	42.5	-2.1
Total		89,157	83,303	81,856	84,347	100.0	3.0

1) Companies that are currently operating but have not generated sales for the year are also classified as 'Closed' and excluded from the population.
2) The number of PC room workers from 2020 reflects the current status data provided by the National Tax Service, and was prepared based on the National Statistical Office data until 2019. Take caution when comparing.

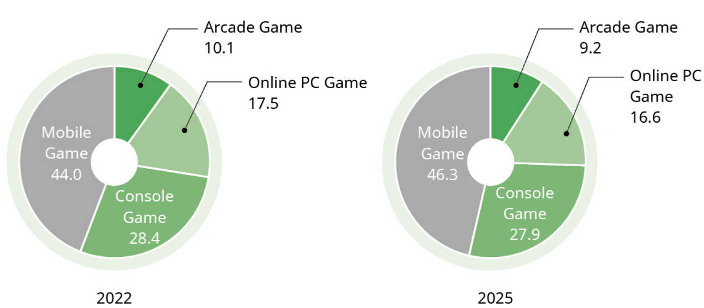
1-7. The Global Game Market in 2022 Grew by Only 0.9% YoY

The size of the global games market in 2022 increased by 0.9% YoY, amounting to USD 208.249 billion, a significant slowdown from the 5.9% growth rate in 2021. The global game market in 2022 was very challenging, and as very complex factors such as the recovery from COVID-19, the emergence of alternative entertainment, and changes in the macroeconomic environment, including global interest rate increases, affect the growth of the game market, the future outlook of the game market is becoming more difficult to predict.

Looking at each game platform, the PC games market only grew by 0.1% as of 2022, and the mobile game market showed a growth rate of -0.5%. Console games grew by 2.4% in 2021, but are expected to grow by an even better 2.6% in 2022. This is due to the release of new console games and the expansion of the console gamer base, which is expected to increase the growth rate to 6.1% in 2023. The arcade games market is over the worst circumstance, but its growth is weakening. It recorded a negative growth at -25.9% in 2020, went up to 9.5% in 2021 and down to 4.1% in 2022. As it is expected to practically stagnate at a growth rate of 1.0% from 2023 to 2025, a turning point such as a change in lifestyle will be needed for the arcade game market to recover its growth regardless of the COVID-19 crisis.

Figure 6 Global Game Market Share by Platform (2022/2025)

(Unit: %)

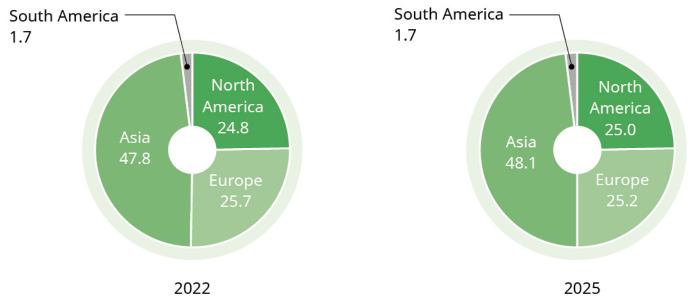


*Source: PWC 2023; Enterbrain 2023; JOGA 2023; iResearch 2023; Playmeter 2016; NPD 2023

Comparing the future outlook by game platform, the game market share of the mobile games is expected to increase from 44% in 2022 to 46.3% in 2025, while that of arcade games to slightly decrease from 10.1% in 2022 to 9.2% in 2025 that its small market size is expected to continue to decline. Console games are expected to decline slightly from 28.4% to 27.9% in 2025, but the market size is expected to be maintained. PC games are expected to decline from 17.5% in 2022 to 16.6% in 2025, fully affected by the market encroachment caused by the growth of mobile games.

Figure 7 Global Game Market Share by Region (2022/2025)

(Unit: %)



*Source: PWC 2023; Enterbrain 2023; JOGA 2023; iResearch 2023; Playmeter 2016; NPD 2023

Part 2. Key Issues in the Domestic Gaming Industry in 2022

1. Termination of the Game Shutdown Law and Implementation of the Game Hour Selection System

On January 1, 2022, the game shutdown system was officially abolished. The game shutdown system is a system that prohibits the provision of Internet games to youth under the age of 16 during the late night hours from midnight to 6 a.m. It was introduced in 2011 through an ammendment to the「Youth Protection Act」to guarantee teenagers' right to sleep and prevent overindulgence.

The government has unified the protective measures to prevent youth overindulgence in games into a “game time selection system”. The game time selection system allows youths under the age of 18 to decide the game playing time as they desire upon request from themselves or their legal representatives. The emphasis was on giving autonomy to guardians and children to control their gaming time. When it was introduced in 2012, it was called the “selective shutdown system,” but the name was softened to reduce the coercive tone.

Immediately after the game shutdown system was abolished at the beginning of the year, there was some confusion occurred on site. This is because the game time selection operating system was not established in time. For parents or users to set game usage hours, they had to visit the website of the company providing the individual game or service. The problem is that the application form and application location are different for each game company, and the accessibility is low. Nexon, NCSoft, Netmarble, NHN, and Riot Games were registered on the Game Culture Foundation website, but access was only possible by outlinking.

To enhance the operation of the game time selection system, the government has assigned the Game Culture Foundation to handle applications and civil complaints en bloc. While the system was being developed, major game companies also agreed with the purpose of the policy and actively participated in the service.

As the mandatory shutdown system that had restricted the gaming industry for ten years was lifted, efforts were made within the game industry to establish youth protection measures and spread a proper game culture. Game literacy education was prepared at the level of individual game companies to understand the environment and cultural context surrounding games and to provide information on proper game use.

The importance of parental guidance on games at home has also increased. The Ministry of Culture, Sports and Tourism, the Korea Creative Content Agency, and Game Culture Foundation also operated "Education for Guardians to Understand Games" and "Game Culture Family Camp" to expand communication opportunities among families.

The game time selection system is significant in that it prevents overindulgence in games through communication between youth game users and their guardians, rather than through government regulation or external control. Autonomy is guaranteed to young users and parental rights to guardians. The future task is to operate stable integrated services and expand the participation of domestic and foreign game companies. Active cooperation and support from more game companies is needed to consolidate its position as a minimum safety measure for creating a healthy daily life with games to raise social awareness.

2. Pilot Operation of Redemption Arcade Game Facility

For the first time in 16 years since 2007, a pilot operation of a point-reward arcade game (redemption game) facility was conducted. The purpose is to find a way out of recession in the arcade game industry.

Pilot stores such as Yeonsinnae Jjanggu Arcade and Incheon Songdo Fun It were opened to meet family users. The possibility of developing it into a new leisure and cultural space was explored by connecting various facilities such as a coin singing room, a billiards room, and a PC room, along with a game room equipped with a point-rewarding arcade game machine. It is located in a complex shopping mall consisting of a theater, cafe, and shopping center, and serves as a family entertainment center (FEC).

A point-reward arcade game is an arcade game in which the outcome of the game is determined by the user's skill and rewards are provided with prizes are provided according to the results of the game. You can collect points or tickets with recorded scores and exchange them for desired products.

Overseas, point-reward arcade games have been established themselves as a part of family-oriented complex entertainment venues in conjunction with general restaurants, family restaurants, and fast food franchises. In Korea, on the other hand, it has long been prohibited by law. In 2006, it was hit hard by the <Sea Story> incident, which caused social controversy due to its highly speculative nature and addictive nature.

As a result, there has been discussion about relaxing regulations to improve the image of the arcade game industry and promote it as a cultural industry with a growth engine. In 2021, four companies, including A&A Entertainment, Youngbae, Bbang, and Purse One, received approval for the regulatory deferment (Regulatory Sandbox) system and were selected as pilot operators.

The point-reward arcade game facility operated on a pilot basis drew a line from game machines with heavy gambling elements. Only games with electronic payment methods such as games for all ages, mechanical games, games based on user ability, and IC cards were introduced. The details of point collection, accumulation and prize exchange are transparently recorded on the computer, which prevents the game from turning into a speculative game.

The Game Management Committee also signed a business agreement with the American Arcade Game Association. It closely cooperates in promoting related industries through the revitalization of point-reward arcade games, joint research on significant issues, and professional training. With the goal of creating a new family-type game center, the plan is to review the effectiveness of the game center and improve the positive image of the domestic arcade game industry.

The pilot operation of a point-reward arcade game facility is meaningful in that it can remove the legal restrictions that have been limited the industry and confirm new growth potential as a place for families and couples to relax and enjoy games. The pilot operator is also gradually improving the image of arcade games and making efforts to create a play space that everyone can visit without feeling intimidated.

Improving public awareness to expand the market base is a challenge. A pilot store opened, but it was somewhat disappointing in terms of attracting family users and commercial performance. It seems desirable for arcade game makers to develop games with a variety of materials and increase export competitiveness by integrating with other content genres, such as K-pop, dramas, and movies.

The pilot operation period is two years until 2024. According to the results of the pilot operation, the overall business feasibility review and legislation will be carried out, including whether score reward-type arcade games are suitable for domestic introduction, maintenance of detailed standards and legal requirements, and convergence business simulation.

3. Games Recognized as Cultural Arts

In 2022, a partial revision to the 「Culture and Arts Promotion Act」 was passed by the National Assembly, providing a legal basis for including games within the category of culture and arts. The amendment was proposed by Cho Seung-rae, a member of the Democratic Party of Korea, in November 2020. The purpose is to promote games as a comprehensive art that combines various art genres such as video, art, novels, and music. It was welcomed by both inside and outside the game industry, as it improved negative perceptions about games and made it possible to prepare related policies from the perspective of promoting culture and arts rather than regulation.

The 「Culture and Arts Promotion Act」 was enacted in 1972. At that time, only five items were included in the culture and arts category: literature, art, music, entertainment, and publishing. Afterward, dance, theater, and film were added in 1987, applied arts, Korean traditional music, photography, architecture, and language in 1995, and comics in 2013. It took nearly 50 years for games to be included in the cultural arts category.

Although the legal basis has been established, efforts are needed to improve and support related laws and systems in order for games to be fully recognized as culture and art. At the "Games, Become Culture and Art!" discussion held at the G-Star International Game Exhibition in November 2022, it was suggested that there was a need to define the artistic characteristics and identity of games. Details of provisions, such as support for professional arts organizations, and a survey of the current status of the game industry that reflects the characteristics of culture and arts are also being reviewed.

After the passage of the revision, various events were held to publicize the cultural and artistic value of games. In addition to events planned by individual game companies for users, a variety of events such as orchestra performances featuring original soundtracks (OSTs) from various games with artistic quality can be seen and art exhibitions using game intellectual property (IP) were held and attracted public attention.

The Korea Game Forum and the National Assembly Cultural Contents Forum, a research group of the National Assembly, held a “Game Culture and Arts Concert” in the National Assembly conference room, allowing people to experience the changed social atmosphere. In the past, the 19th National Assembly proposed a bill to define gaming as an addictive behavior like drugs and subject to treatment. In protest against this, a flash mob played the game's theme song in Gwanghwamun Square. Eight years later, a concert featuring game OSTs was held at the National Assembly.

The Game Culture and Arts Concert is hosted by the “Plasic Game Symphony Orchestra,” led by former conductor of the Daegu MBC Symphony Orchestra, Jin Sol, and includes Webzen, Netmarble, Smilegate, NCSoft, Krafton, Pearl Abyss, Com2uS, Kakao Games, Nexon, NHN, and Neowiz. Game videos were screened along with representative game OSTs, and received favorable reviews.

4. <Lie of P>, Winner of Three Awards at Gamescom, Challenges Console Game Market

Gamescom 2022, Europe’s largest game show held in Cologne, Germany, brought more news than expected was delivered. <Lie of P>, a “*Souls*-like” single-player action role-playing game (RPG) developed by Neowiz Round 8 Studio, won a triple crown at the Gamescom Awards Ceremony, taking home three awards in the categories of “Best Action Adventure Game”, “Best RPG”, and “Most Anticipated PlayStation Game”.

<Lie of P> is the first Korean game to be selected as an award winner at Gamescom, which is considered one of the world's three largest game exhibitions, along with E3 in the United States and Tokyo Game Show in Japan. It has been held annually in Cologne, Germany since 2009. It is a remarkable achievement for a domestic game development team to upload

a self-developed IP and game to a global event that attracts the attention of game fans and game-related industry workers from all over the world.

<Lie of P> is set in the Belle Epoque era of the late 19th century and featurews a unique worldview that adapts the classic “Pinocchio” into a cruel fairy tale. The visuals, implemented with realistic graphics and the difficult battles that require practiced operation skills, attracted attention as attractive elements that take advantage of the characteristics of the genre. The unique weapon system that separates and combines the blade and handle also attracted attention.

Neowiz participated in Gamescom 2022 with an exclusive booth, introducing a new trailer video for <Lie of P> and demonstrating a two-hour demo that visitors could play for themselves. At the time, a long waiting line formed at the exhibition site as visitors came to the booth to preview <Lie of P>.

<Lie of P>, which received a lot of attention not only domestically but also overseas, quickly emerged as a globally anticipated work and played a role in triggering a series of challenges in the console field by Korean game companies. The first demonstration was held for domestic users at G-STAR held in Busan, raising expectations for the game's release. In addition to the rich content ballroom, support for various platforms such as Sony PlayStation (PS) 4 and PS5, Microsoft Xbox Series, and PC (Steam) was also announced.

The three wins by <Lie of P> at Gamescom came as a fresh shock to the domestic gaming industry, which has been highly dependent on online and mobile platforms. It is significant in that it has been recognized for its technology and game quality by submitting a new AAA game in the console game field. The fact that it is a package-type game, which excludes the excessive game profit business model (BM) represented by probability items also received positive response from domestic and foreign game users.

5. Game Shows Returning to Offline after 3 Years

As the COVID-19 pandemic that has struck the world has entered a waning phase, various offline exhibition events have resumed. “G-Star 2022,” Korea’s largest game show held in Busan every November, has also been resurrected with unprecedented splendor.

The number of visitors to G-Star 2022, estimated by the G-Star Organizing Committee, was 184,000. Despite a tragic accident occurred in Itaewon, Seoul just a few weeks before the event was scheduled to be held, raising concerns about the safety of exhibitions that attract large crowds, but not a single accident occurred. The organizing committee worked closely with related organizations such as the Ministry of Culture, Sports and Tourism, Busan City, and the police and fire department to conduct the event with safety as the top priority. The number of people entering each area was limited to limit crowding, and more than twice as many safety management personnel were deployed compared to previous years.

G-Star's main sponsor Wemade, as well as game companies such as Nexon, Netmarble, Kakao Games, Krafton, and Neowiz, set up large exhibition booths and introduced a variety of new games. The executives and core developers of each game company also showed active communication by directly welcoming visitors at the exhibition site. In addition to the demonstration of new games, the creation of an experiential booth where you can enjoy and immerse yourself in the major game IP ecosystem in various ways also attracted attention.

For the first time, BTC Hall 2, which was additionally set up on the third floor of the second exhibition hall of BEXCO in Busan, attracted a lot of attention as it featured booths for major subculture games and the first domestic demonstration of Neowiz's <Lie of P>. The Level Infinite booth, where events related to Shift Up <Goddess of Victory: Nikke> were held, and the Chinese HoYoverse booth, well known for <Genshin>, have an “open run” to purchase game IP goods as soon as the entrance gate to the exhibition hall opens each day.

Game business activities also became active as the face-to-face event was held after a long wait. In the Business-to-Business (BTB) section, where the booth size was increased by more than 2.5 times compared to the previous year, 2,213 paying buyers from around the world registered over three days. The Developer Conference, which was held as a side event, received an enthusiastic response as Capcom producer Ryozo Tsujimoto, well-known for the <Monster Hunter> series, took the stage as a speaker.

Prior to G-Star, Germany's "Gamescom" and Japan's "Tokyo Game Show" were also normalized and held online events and offline exhibitions simultaneously. Gamescom, held in August, was attended by 1,100 companies from 53 countries and 265,000 people from 100 countries. In addition to Neowiz, which won three awards for <Lie of P>, major domestic game companies such as Nexon, Line Games, and Krafton also sought opportunities to expand overseas through participation in Gamescom. Fifteen companies participated in the Korean joint pavilion operated by the Korea Creative Content Agency and conducted business consultations and contracts with local European publishers.

A total of 465 companies, including 299 Japanese companies and 166 overseas companies, participated in the "Tokyo Game Show 2022", which was held at the Makuhari Messe in Chiba Prefecture, Japan for four days from August 15. However, the three representative console platform companies, Sony, Microsoft and Nintendo, regrettably did not participate in the Tokyo Game Show. The number of visitors to the exhibition hall during the event period was counted at 138,192.

The US "E3 Show" reversed its previous announcement to cancel the offline event and pushed for a normal event, but suffered a setback as it ultimately failed. The E3 show, hosted by the Entertainment Software Association of America, is considered the world's largest gaming event. Due to the COVID-19 pandemic, major game companies took a hit as they switched to holding their own events instead of attending the E3 show.

China Joy, China's largest game show, also postponed its event schedule due to the blockade of Shanghai due to the resurgence of COVID-19 in China, and ultimately withdrew its offline hosting. China Joy, which only held the event only online, implemented an exhibition hall in the metaverse space and explored the possibility of a non-face-to-face game show through experiential events.

6. Subcultural Genres Becoming Mainstream

This is the year in which “subculture” games, which, as the name suggests, were treated as a non-mainstream genre, showed clear growth and solidified their position in the market. There was also an unusual case of a game made by a Korean developer was exported to Japan, which is considered the home of the subculture, and became a box office success.

In Korea, subculture games are mainly about interacting with various beautiful characters based on graphic design reminiscent of Japanese animation. Subculture itself used to be considered the exclusive property of a specific group of enthusiasts, but as the demand for comics, webtoons, web novels, animations, games, etc. increased, it developed to a level close to popular culture.

Developed by Nexon Games, <Blue Archive>, is considered to be a representative example of a successful subculture game IP that was planned and produced entirely in Korea. It achieved commercial success, ranking first in popularity and in the top five in sales in the Korean and Japanese app markets. Although it went through some ups and downs, including being embroiled in controversy over the Game Management Committee's reclassification of the game's rating due to concerns about the sensational nature of some of the illustrations in the game, it has solidified its popular position through consistent updates and user communication. IP expansion, including the release of album packages consisting of game OSTs, art books, comic books, and figure products, also received positive reviews.

<Goddess of Victory: Nikke> also achieved global sales of $100 million (approx. KRW 130.6 billion) within a month of its release. It is a subculture gun shooting RPG developed by Shift Up and operated by Level Infinite, an overseas publishing subsidiary of China's Tencent. It also recorded high performance in Japan, proving the competitiveness of domestic IP. It also entered the North American market and achieved the success of increasing about 15% of total sales in the United States.

In the domestic mobile game market, the multiplayer online role-playing game (MMORPG) genre was at the top of the sales rankings. Subculture games have established their presence by rising to the top of the sales rankings whenever a new game is released or a major update or promotional event takes place.

Subculture games created by Chinese game companies also stood out in the domestic market. Various Chinese games, including HoYoverse's <Genshin>, which is gaining global popularity, as well as Zilong Games' <Archeland> and AISNO Games' <Mugimido>, have focused their efforts on targeting the Korean market through localization processes such as full Korean dubbing.

The rapid rise of subculture games has also had a significant impact on the domestic game industry. Major game companies announced a lineup of subculture games as their next games targeting for 2023, and began securing their own IP. In addition to expanding genre diversity, it also served as an opportunity to promote the expansion of a broader ecosystem based on game IP.

Subculture games also have high expectations for potential growth in the global market. China, which has begun to gradually open the door to foreign games, calls subculture ‘two-dimensional culture’ and is seeing explosive demand, especially among young people.

7. Promising Indie Games, Growing Market Interest

Interest in indie games has grown as major game companies have delayed the development and release of major new games. Increasingly, they have gone beyond supporting the indie ecosystem as a social contribution to using it as a new growth engine to support full-scale commercialization and publishing. It is said that this has played a role in revitalizing the game industry as a whole, as games that have achieved commercial success by capitalizing on the novelty and originality of indies.

<Skul>, published by Neowiz, became the first Korean packaged indie game to surpass 1 million copies in cumulative sales. It has been about a year since it was officially released on Steam, the global PC game distribution platform, in January 2021. The developer, Southpaw Games, is a company founded by members of the Game Development Club at Chonnam National University.

<SANABI>, which won the 2022 Korea Game Awards for indie games, was also published by Neowiz. It is a work that drew attention for its unique concept of Joseon cyberpunk chain action. Synergy was maximized by taking on the freshness and unpolished charm of indie games and having a major game company taking charge of service operation and marketing. In addition, Neowiz's investment in indie games came to fruition by expanding its business in various ways using the <Cat & Soup> IP, which has exceeded 20 million cumulative downloads worldwide.

Smilegate, which operates Stove Indie, is also considered a strong supporter of the growth of the domestic indie game ecosystem. Stove Indie is a dedicated distribution platform where you can enjoy indie games on your PC. It supports service operation and marketing promotions for indie games launched on the platform. It also supports with localization work, including Korean translation, so that domestic users can comfortably enjoy promising overseas indie games.

With over 500 indie games, Stove Indie has served as a point of contact between users with diverse game tastes and new developers. This had an impact on increasing the diversity of materials and genres that make up the game world view. With the emergence of platforms where quality indie games can be easily accessed in one place, the number of indie game users is gradually increasing.

Gravity, a mid-sized game company, is also actively pursuing indie game publishing as a new business. It supported the development of indie games using the <Ragnarok> IP and discovered indie game companies that created new promising IPs and participated in domestic and international game exhibitions.

Support for the indie ecosystem from major game companies such as Nexon and NCSoft is also being steadily increasing. Global platform operators such as Google, Apple, Microsoft, Sony, and Nintendo also continue to support indie developers and implement fee reduction policies. Unity Korea held the first indie game development event “Unity Game Jam” in 2022.

At the government level, the Korea Creative Content Agency under the Ministry of Culture, Sports and Tourism is conducting a project to support indie game teams in game planning. In addition to providing incentives for excellent works, it also provides specialized consulting to help with game development and business establishment.

8. Games Emerge as a Major Keyword in Political World

With the presidential election, games have emerged as a major political agenda. The presidential candidates of each party put forward game-related policies as their main campaign promises, and appeared on gaming YouTube channels to reveal their views on games and their true thoughts on future policy directions. Legislation was also proposed to cover various issues such as the game rating system, the disclosure of information on probability items, and e-sports promotion.

The reason why presidential candidates from both parties rushed to announce game-related pledges was due to analysis that the 2030 generation has established itself as a core support base. In addition to the announcement of the pledge, game-friendly policies continued throughout the election campaign.

At the time, President Yoon Seok-yeol was a candidate for the presidential electin of the People Power Party and pledged to eliminate unfairness in the game market. Key pledges included fully disclosing information on probability items, which had been a source of user dissatisfaction, establishing a dedicated investigative body for small-scale game fraud, resolving in accessibility in games for the disabled, and introducing a regional e-sports affiliation system.

The Democratic Party candidate Lee Jae-myung and the People's Party candidate Ahn Cheol-soo at the time also made the disclosure of probability-type item information as a key promise. All three candidates expressed somewhat reserved and cautious opinions on play-to-earn (P2E) games and non-fungible tokens (NFTs), and took opposing positions on gaming disabilities.

After President Yoon was elected, the Ministry of Culture, Sports and Tourism began putting its pledge into practice by putting considerable effort into legislating an revision to the Act on the Promotion of the Game Industry, which aims to mandate the disclosure of information on probability-type items. Minister of Justice Han Dong-hoon also announced legislation to amend the Civil Code to introduce the 「Digital Content Contract Act」, which will regulate transactions related to digital content and related services. The purpose is to hold appropriate legal responsibility for the provision of false probability information and the manipulation of probabilities in so-called “gacha games”.

However, the gaming industry's expectations are still high regarding the overall policy that will lead to the promotion of the entire gaming industry and the removal of regulations.

9. Saudi Oil money, a Big Player in the Game Industry

Saudi Arabia has emerged as a major player in the domestic gaming industry. After using its vast oil wealth to invest in global gaming companies, he became a major shareholder by investing trillions of won in Nexon and NCSoft. Saudi Crown Prince Mohammed bin Salman, who has established a cooperative relationship with a Korean information technology (IT) company, also showed special interest in games and content, raising expectations for additional investment.

Saudi Arabia, which has accumulated wealth centered on the oil industry, is trying to transform into a technology-centered country by actively improving its constitution. “Neom City,” a smart city being built along a 170km straight line in the middle of the desert, aims to be an eco-friendly technology city run by 100% renewable energy. Games and content are key areas that Saudi Arabia has set as new growth engines for the future.

The Saudi Public Investment Fund (PIF), led by Crown Prince Bin Salman, operates $500 billion in fund. Earlier this year, “Savvy Gaming Group” was established as a game-related corporation and purchased shares of Activision Blizzard, Capcom, Take-Two, and Electronic Arts (EA). PIF has invested approximately 247.6 billion yen on several occasions since the beginning of the year, securing a stake in Nexon, which is listed on the Tokyo Stock Exchange in Japan, and becoming the second largest shareholder. PIF also purchased 9.26% of NCSoft shares, making PIF the second largest shareholder after CEO Kim Taek-jin. The total amount invested by PIF to secure shares in Nexon and NCSoft is more than $2.3 billion.

Shift Up, which developed <Goddess of Victory: Nikke>, is also one of the game companies receiving great attention from Saudi Arabia. Officials from PIF and Saudi Venture Capital visited Shift Up’s headquarters in Seoul. At the “Korea-Saudi Investment Forum”, which was attended by 300 government and business officials from both countries, the Saudi Ministry of Investment and Shift Up signed a business agreement and promised comprehensive cooperation in the field of games.

Wemade is seeking to enter the Middle East market through blockchain business. The goal is to build a blockchain-based digital economy in Neom City, Saudi Arabia. To this end, it is also in the process of establishing a company in the United Arab Emirates (UAE).

Saudi PIF plans to invest more than $38.7 billion in the game industry through Savvy Game Group by 2030. Based on this, the goal is to increase the number of Saudi-based game companies to 250 and secure more than 30 games produced by Saudi-based game companies among the top 300 global games. As the country's gaming industry infrastructure is still in its early stages, the country has begun to attract global gaming companies and provide high-quality foreign human resources through aggressive overseas investment.

10. Diversification of Game Platforms

Domestic game companies that showed strength in mobile platforms began expanding into the PC and console games. This is to expand the stage into the global market, pioneer new sales channels, and diversify the profit structure. There is also growing interest in multi-platform and cross-play support, which allows users to enjoy games in any environment across mobile, PC and console boundaries. New challenges are also actively pursued through investments in overseas console game developers or studio operations.

<Calisto Protocol>, released by Krafton, has great symbolic significance as a domestic game company challenging the unpopular horror game genre with a AAA grade console game. It is evaluated that the company has solidified its position as a global game company by utilizing director Glenn Schofield, who is well-known for the <Dead Space> series, and proven

overseas developers from a North American studio.

Kakao Games, through its European subsidiary, made a strategic investment worth 24 billion won in Frost Giant Studio, an American game company with renowned real-time strategy simulation (RTS) game developers. Frost Giant Studio is a company comprised of core StarCraft developers. This can be interpreted as a move by Kakao Games, which has been focusing on the mobile games, to prepare to enter the global PC game market.

Nexon, NCSoft, Netmarble, and Neowiz also prepared for global expansion by introducing major new games to be released on PC and console platforms. Unlike Korea, which is considered a barren land for console games, console games still account for a high proportion of Western markets such as North America and Europe. The winners of the "Game of the Year (GOTY)," which selects the best games at the end of the year, are also mostly produced in the console game market.

It is true that the Korean game industry has achieved rapid growth in a short period of time based on mobile platforms, MMORPGs, and BM represented by probability items. At the same time, it faced a lot of criticism from game users and calls for change. It is expected that the challenge of the console and PC platforms by major domestic game companies will have great significance in achieving a new leap forward as a global game company beyond achieving the management indicator of increasing sales.

Part 3. Game Play Charactertistics

1. Overall Game Usage Rate

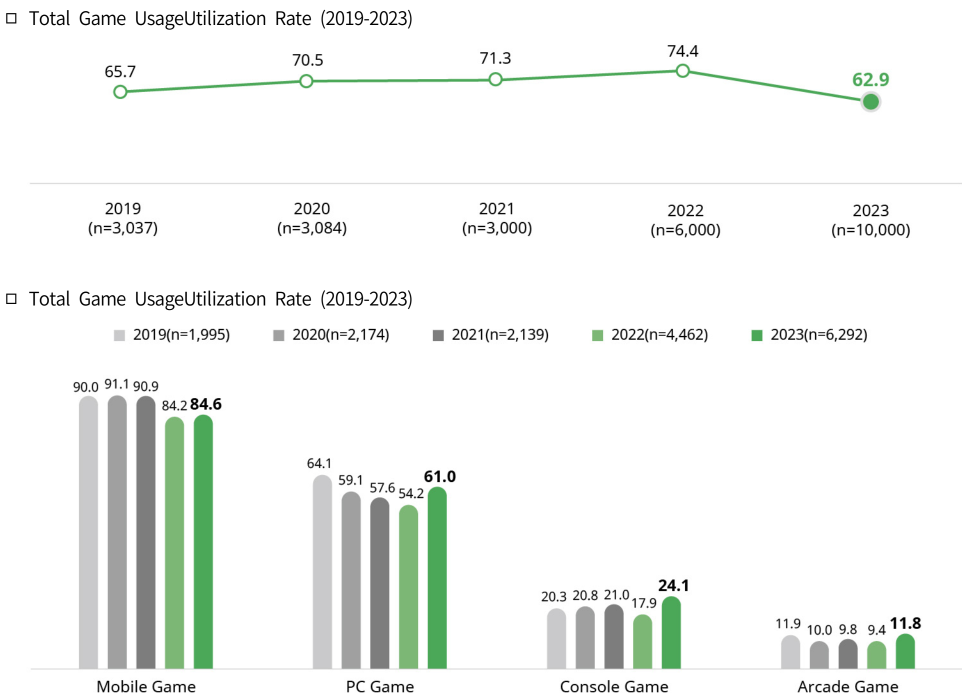
According to a survey on game usage among the general public(n=10,000) ageds 10 to 64 years since June 2022, 62.9% of them played games, showing 11.5%p drop from the 2022 survey.

Regarding game platforms among those exposed to games(n=6,292), the “Mobile Game” (84.6%) received the highest usage rate, followed by “PC Game” (61.0%)”, “Console Game” (24.1%), and “Arcade Game” (1.8%).

The overall game usage rate has showed an upward trend since 2020 but seems to have dropped down to the 2019 level.

Figure 8 Game Usage Rate

[Unit: %]



2. Game Usage Rate by Platform

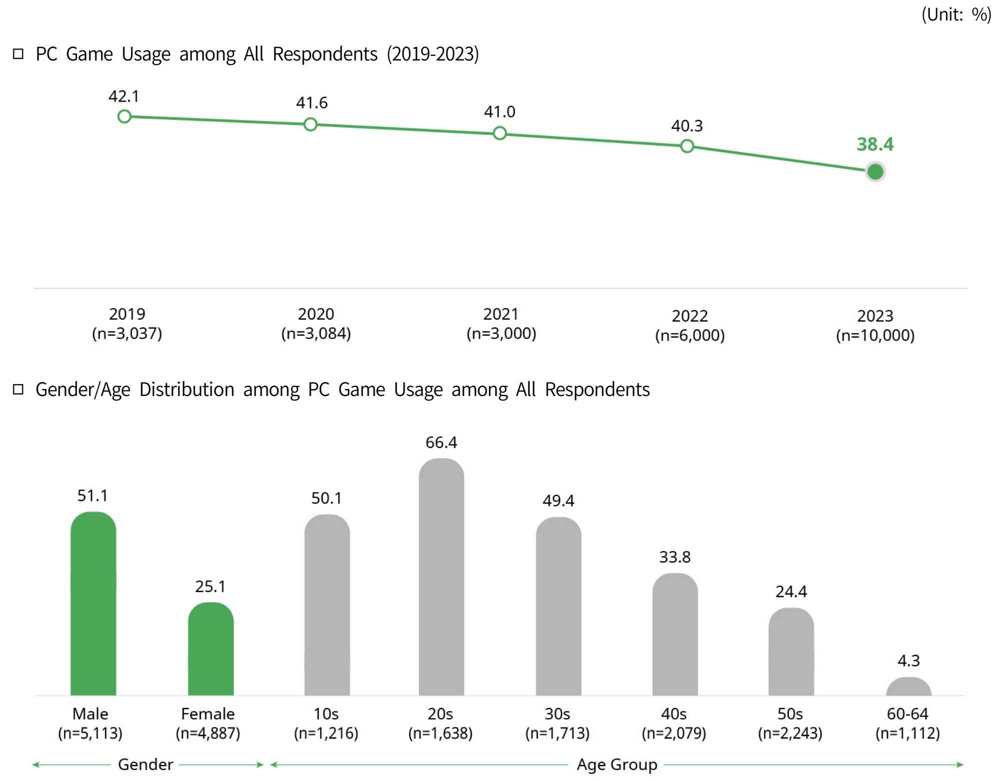
2-1. PC Game

The recent(after June 2022) usage rate of PC games for all respondents (n=10,000) was 38.4%, a 1.9%p decrease from the usage rate of PC games in 2022, which was 40.3%.

Looking at the characteristics of the respondents, the PC game usage rate was significantly higher among males than among females, and was comparatively higher among those in their 30s and below.

The PC game usage rate has declined since 2019.

Figure 9 PC Game Usage Rate



2-2. Mobile Game

The recent(after June 2022) utilization rate of mobile games of all respondents(n=10,000) was 53.2%, a 9.4%p drop from the usage rate of mobile games in 2022, which was 62.6%.

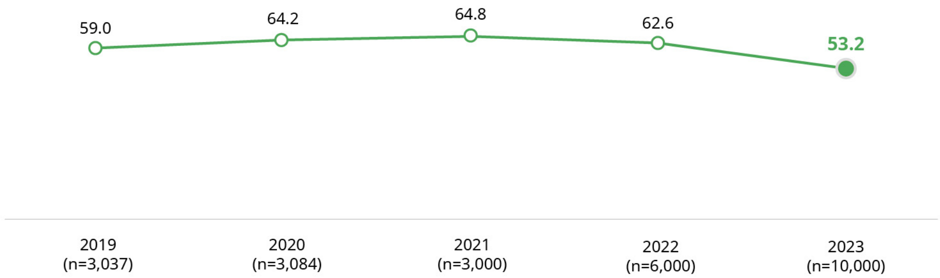
Looking at the characteristics of the respondents, the mobile game usage rate of males was six out of ten (57.8%) and that of was five out of ten (48.5%), and by age, those in their 30s or under had the relatively high usagerate as was for PC game users.

The mobile game usage rate has declined since 2019.

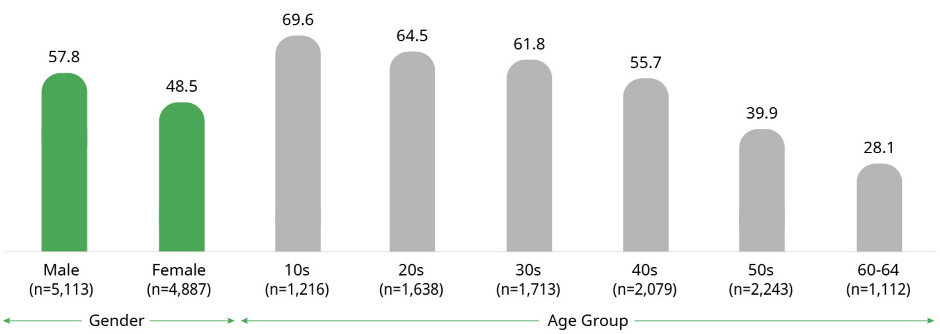
Figure 10 Mobile Game Usage Rate

(Unit: %)

□ Mobile Game Usage among All Respondents (2019-2023)



□ Gender/Age Distribution among Mobile Game Usage among All Respondents



2-3. Console Game

The recent (after June 2022) usage rate of console games of all respondents (n=10,000) was 15.1%, a 1.8%p up from the previous year.

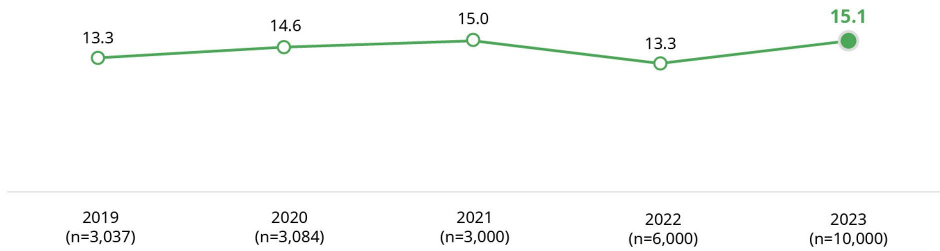
By characteristics of the respondents, males appeared higher than females, and it showed that the usage rate of console games was relatively low among those in their 20s to 40s compared to other age groups.

The console game usage rate decreased slightly in 2022 and has recovered to the level of 2021.

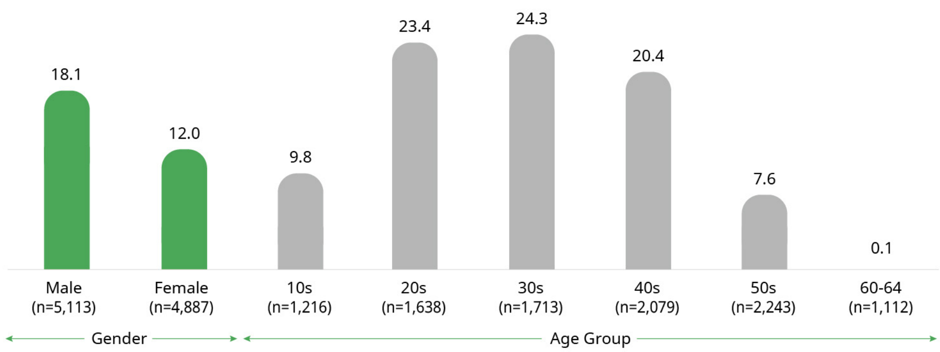
Figure 11 Console Game Usage Rate

(Unit: %)

□ Console Game Usage among All Respondents (2019-2023)



□ Gender/Age Distribution among Console Game Usage among All Respondents



2-4. Arcade Game

The recent (after June 2022) usage rate of arcade games of all respondents (n=10,000) was 7.4%, an increase of 0.4%p comapred to the arcade game usage rate of 2022 at 7.0%.

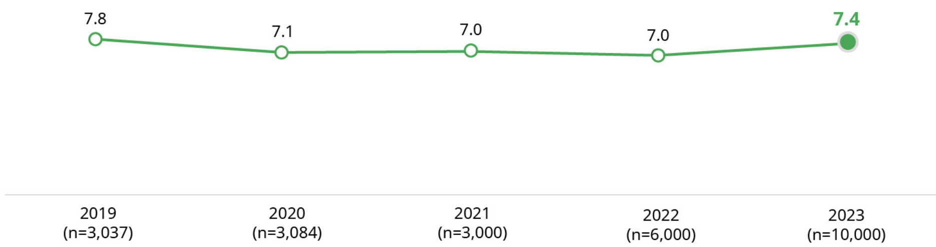
By respondents characteristics, males (7.6%) and females (7.3%) showed similar rates, while those in their 20s to 30s (20s: 12.7%, 30s: 10.8%) showed relatively high rates.

The arcade game usage rate has shown a downward trend from 2020, but increased slightly this year.

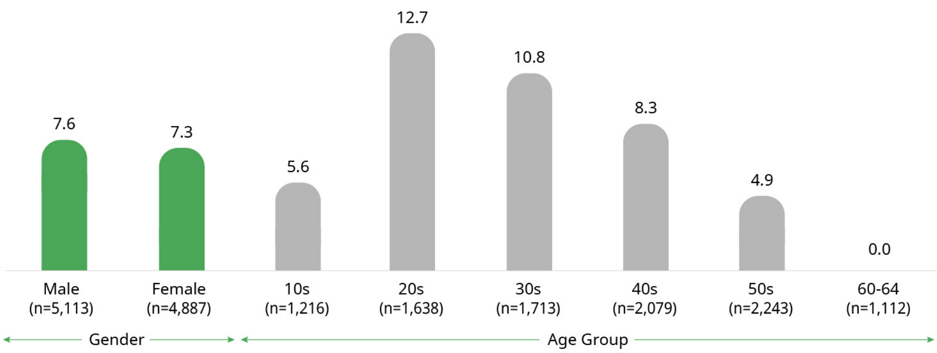
Figure 12 Arcade Game Usage Rate

(Unit: %)

□ Arcade Game Usage among All Respondents (2019-2023)



□ Gender/Age Distribution among Arcade Game Usage among All Respondents



2023
韩国游戏
白皮书

摘 要

Game

第一章　总论

据统计，2022年韩国游戏市场规模为171.95亿美元，与2021年相比，以韩元为准，增加了5.8%(因汇率上升，以美元为准减少6.3%)。最近10年内，国内游戏产业除了2013年减少0.3%之外，呈现持续增加的趋势。有些停滞的增长率在2020年因发生新冠疫情，增长率有所上升，但是随着新冠疫情进入恢复期，增长率显示出了放缓的趋势。

在游戏制作及发行公司部分，以2022年度销售额，手机游戏达到了101.18亿美元(占有率:58.9%),继去年之后，今年再次成为整个游戏市场中占比最大的部分,电脑游戏达到了44.93亿美元(占有率为:26.1%),占有率同比有所减少,销售额同比增长了3.0%。

从其它平台游戏来看，主机游戏的市场份额为5.1%，销售额为8.67亿美元(增长6.4%)，两项都同比小幅增长，街机游戏的市场份额为1.3%，与前一年相同，但销售额为2.30亿美元，同比增长了8.9%。其次,电脑游戏厅运营企业(网吧)的销售额为14.53亿美元,同比小幅增长,但占有率为8.4%,同比小幅减少,电子游戏厅运营业(街机游戏厅)的占有率为0.2%,与前一年相同，但是销售额为3,400万美元,同比增长了10.4%。

各领域的增长率总体上与去年相比都有所增加。具体来看,在游戏制作及发行业方面,电脑游戏、手机游戏、主机游戏、街机游戏增长率分别为3.0%、7.6%、6.4%、8.9%,而电脑游戏厅运营企业(网吧)和电子游戏厅运营业(街机游戏厅)分别增长了1.9%和10.4%。

据统计，2022年韩国游戏产业出口额同比增加3.6%，达到89.8175亿1,000美元(11.6040万亿韩元，适用韩国银行2022年年均买卖基准率1,291.95韩元)。另据统计，进口额同比减少16.7%，为2.6016亿3,000美元(3,361亿韩元)。

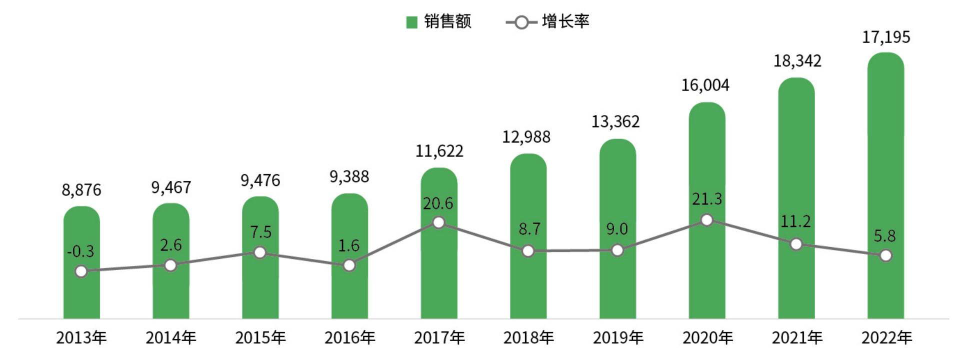
1. 2022年游戏产业动向

1-1. 2022年韩国游戏市场同比增长5.8%，销售额达到171.95亿美元

2022年韩国游戏市场规模为171.95亿美元，比2021年增加了5.8%。在爆发新冠疫情的2020年，由于在家时间的增加，游戏市场也创下了达到21.3%的增长率，继2021年的11.2%之后，2022年又增长了5.8%，虽然增长率本身呈现出逐渐放缓趋势，但是产业规模正在增长。

图 1 国内游戏市场全体规模及增长率(2013 - 2022年)

(单位：百万美元，%)



1-2. 手机游戏市场规模为101.18亿美元，占全体游戏市场的58.9%

随着全球智能手机高配置化趋势的持续，手机游戏的增长趋势也将持续。2022年，韩国手机游戏市场规模达到101.18亿美元，同比增长7.6%。手机游戏在国内游戏市场上的占有率2019年为49.7%，2020年为57.4%，2021年为57.9%，2022年为58.9%，在新冠疫情时期也呈现出持续增长的趋势。这表明国内游戏产业的游戏开发趋势更倾向于支持多平台而非仅专注于特定平台的开发，因此可以预测手机游戏的持续增长。

电脑游戏是国内游戏的两大支柱之一，市场规模达44.93亿美元，同比增长3.0%。在新冠疫情发生之前的2019年，电脑游戏的规模减少了4.3%。得益于新冠疫情的非面对面交流局势，从2020年开始到2022年为止，呈现出正增长趋势，但是在游戏市场上

的占有率维持在26%左右，暴露出了增长的局限性。

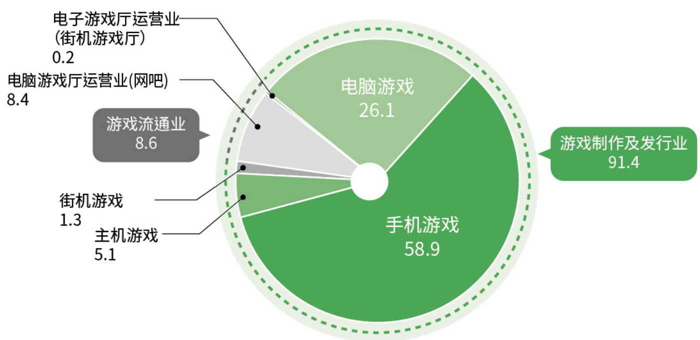
主机游戏到2022年的市场规模为8.67亿美元，同比增长6.4%，但在整个游戏市场上的占有率与前一年持平，达到5.1%。与2021年由于无法购买PlayStation等游戏主机而出现的3.7%下降相比，2022年可以说没有特殊的游戏主机或游戏软件市场相关的焦点问题。

街机游戏在2022年的市场规模为2.30亿美元，同比增长8.9%，但占有率与前一年相同，仅为1.3%。由于市场规模本身较小，难以感知到新游戏设备的开发动向，尽管可以将其视为从新冠疫情时期的典型受害行业逐渐步入恢复期，但是从长期来看，预计增长仍然不容乐观。

网吧和街机游戏厅等游戏流通企业因2020年新冠疫情导致的严重市场萎缩基数效应，已经步入了2022年的恢复期，但网吧的增长率仅为1.9%，与2021年的2.4%相比没有太大的好转，而街机市场的市场规模只有34万美元，虽然微不足道，但是2022年的增长率为10.4%，可认为在一定程度上进入了恢复期。然而，今后与其期待独自增长的转机，还不如同时搞活连锁影院等综合卖场来实现增长的可能性。

图 2　国内游戏市场各领域的比重

(单位：%)



1-3. 国内游戏市场的增长势头短期内面临着很大的不确定性

预计到2023年，国内游戏市场规模将比2022年减少10.9%(以韩元为准)，达到151.60亿美元。游戏产业规模的减少是因为后新冠疫情时期居家时间的减少和可以选择的其它娱乐项目增多，可以看作是因利率上调所导致的经济萧条成为现实的过程。

整个游戏市场的规模趋势因新冠疫情的爆发，到2020年增长率急速上升到了21.

3%，但逐渐降至稳定阶段。前文提到的2023年国内游戏市场规模呈现10%左右的下降趋势，这可以解释为近年来新兴的Netflix、OTT等替代性娱乐形式抵消了游戏市场的销售额，由于多种因素综合作用，未来游戏市场的增长前景变得困难。然而根据游戏平台的特性，可以概括各平台的动向和前景。

表 1　国内游戏市场的规模趋势（2019~2022年）

(单位：千美元，%)

区分	2019年		2020年		2021年		2022年	
	销售额	增长率	销售额	增长率	销售额	增长率	销售额	增长率
电脑游戏	4,122,850	-4.3	4,153,383	2.0	4,925,901	15.0	4,493,440	3.0
手机游戏	6,639,986	16.3	9,178,509	39.9	10,615,246	12.2	10,118,039	7.6
主机游戏	595,805	31.4	925,808	57.3	919,243	-3.7	866,597	6.4
街机游戏	191,824	20.6	192,534	1.6	238,811	20.3	230,349	8.9
网吧	1,750,869	11.6	1,522,817	-11.9	1,608,500	2.4	1,452,533	1.9
街机游戏厅	60,310	2.4	30,931	-48.1	34,603	8.6	33,902	10.4
合计	13,361,644	9.0	16,003,983	21.3	18,342,304	11.2	17,194,860	5.8

※ 销售额的美元换算采用了各年度韩国银行的平均汇率(买卖基准率)，增长率以韩元销售额为准。

电脑游戏虽然不太适合多平台化，但由于忠诚度高的客户存在，可能会维持现状。在持续的游戏产业中占据着较高的份额，但增长率可能受到整体经济趋势的影响。至于主机游戏的前景，预计会受到通过公开市场避开手机游戏的竞争激烈局面或追求利基市场的游戏开发商进入市场的影响，这将对如同《P的谎言》等成功作品的发布和处于过度供应状态的游戏主机制造商的营销策略产生重大影响。

目前在我们游戏市场存在感微乎其微的街机游戏和游戏厅，今后也不会有太大的转机，会受到喜欢街机游戏的一代人的娱乐趋势的影响，而作为游戏流通空间的网吧的前景则预计面临增长困难，因为在家中拥有高性电脑的情况下，人们去网吧的诱因可能不高。

1-4. 2022年出口额同比增长3.6%，达到89.8175亿美元

据统计，2022年国内游戏产业出口额同比增长3.6%，达到了89.8175亿美元。如果适用韩国银行发表的2022年年均韩元对美元汇率(买卖基准率)1,291.95韩元，换算成韩币则为11.6040万亿韩元。据统计，进口额同比减少16.7%，达到了2.6016亿美元，

换算成韩币则为3,361亿韩元。

表 2 国内游戏产业的出口现状 (最近7年)

(单位 : 千美元, %)

区分		2016年	2017年	2018年	2019年	2020年	2021年	2022年
出口	出口额	3,277,346	5,922,998	6,411,491	6,657,777	8,193,562	8,672,865	8,981,751
	增减率	2.0	80.7	8.2	3.8	23.1	5.8	3.6

表 3 国内游戏产业的进口现状 (最近7年)

(单位 : 千美元, %)

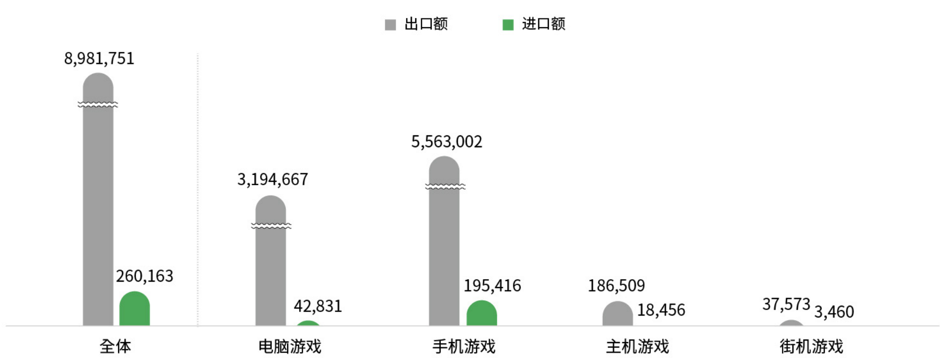
区分		2016年	2017年	2018年	2019年	2020年	2021年	2022年
进口	进口额	147,362	262,911	305,781	298,129	270,294	312,332	260,163
	增减率	-17.0	78.4	16.3	-2.5	-9.2	15.3	-16.7

从各平台的进出口规模来看，手机游戏出口规模最大，达到55.63亿2千美元，其次是电脑游戏出口31.9466亿7千美元。与前一年相比，大部分平台的出口规模都有所增加，但街机游戏却同比减少了6.6%。

从进口规模来看，手机游戏进口规模最大，达到1.9541亿6千美元，其次是电脑游戏，达到4，283.1万美元。大部分平台同比大幅减少，而电脑游戏却同比增长5.4%。尤其是主机游戏(同比减少48.3%)和街机游戏(同比减少66.3%)的减幅非常明显。

图 3 2022年国内各游戏平台出口/进口规模

(单位 : 千美元)



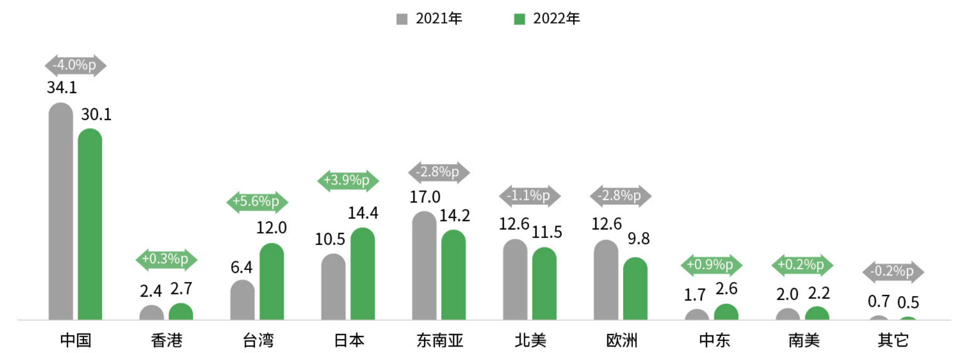
对国内游戏的主要出口国家和地区进行调查的结果显示,“中国”以30.1%占比最高,接着依次为“日本”(14.4%)、“东南亚”(14.2%)、“台湾”(12.0%)、“北美”(11.5%)、“欧

洲”(9.8%)。

将韩国游戏出口国家和地区所占比重与2021年的结果相比，发现“台湾”大幅上升5.6%p，而“中国”则大幅减少到- 4.0%p。

图 4 国内游戏的各出口国家和地区比重比较 (2021~2022年)

(单位：%)



1-5. 韩国占据世界游戏市场的7.8%

通过对主要国家和地区进行比较，韩国在全球游戏市场位居全球第四。2020年排名第四 (6.9%)，2021年排名第四(7.6%)，2022年为7.8%，持续保持着原来的排名，比重正在上升。游戏市场规模比韩国更大的国家是排名第一的美国、排名第二的中国和排名第三的日本。剩下的第5位到第10位的排名与2021年相同，分别是第5位英国、第6位德国、第7位法国、第8位意大利、第9位加拿大、第10位台湾。

从不同的平台来看，北美和欧洲市场保持着主机游戏和街机游戏的优势，亚洲则保持着电脑游戏和手机游戏的相对优势。然而，具体来看，主机游戏在北美和欧洲市场上相对减少或停滞，但在亚洲市场上规模正在扩大。

电脑游戏市场规模统计为363亿美元。截至2018年，韩国排在中国之后，位居第二，但在2019年、2020年、2021年和2022年连续排在美国之后，位居第三。韩国在2021年所占比重为13.2%，比前一年有所上升，而在2022年所占比重则下降到12.7%。市场规模相比2021年的49亿美元下降到46亿美元。

在手机游戏市场上，韩国的世界市场占有率从2019年的9.1%到2020年的10.3%，到2021年的10.6%，一直保持着持续上升的趋势。2022年比重扩大到11.4%，排名上升。2021年排名第四，2022年超过日本排名第三。

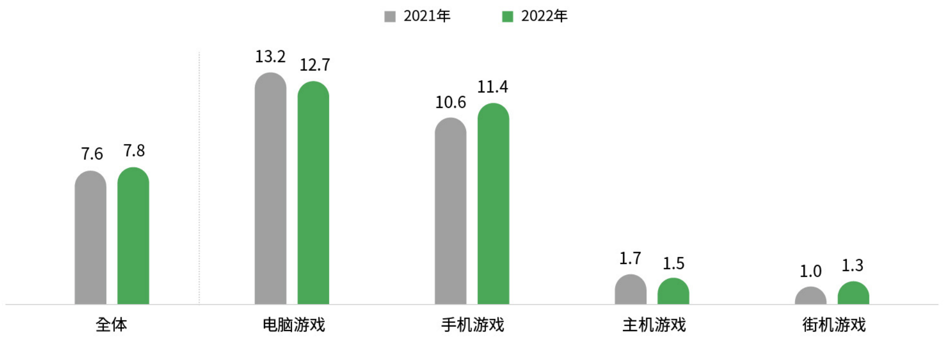
表 4　2022年韩国游戏在世界市场上所占的比重(以销售额为准)

(单位：百万美元，%)

区分	电脑游戏	手机游戏	主机游戏	街机游戏	全体
世界游戏市场	36,352	91,681	59,141	21,076	208,249
韩国游戏市场	4,632	10,430	893	272	16,227
占有率	12.7	11.4	1.5	1.3	7.8

图 5　韩国游戏在世界市场上所占比重比较

(单位：%)



1-6. 制作及发行企业1，287家，网吧8，485家，街机游戏厅500家，从业人数84,347人

截至2022年，游戏制作和发行企业共有1,287家。在游戏流通业中，网吧为8,485家，街机游戏厅为500家。2022年游戏产业从事者人数为84,347人，比前一年的81,856人相比增加3.0%。游戏制作及发行企业的从业人数为57.5%，游戏流通企业(网吧、街机游戏厅)从业人数为35,833人，占全体从业人数的42.5%。

2022年游戏制作及发行企业从业人数48,514人，比前一年的45,262人增加了7.2%。除街机游戏以外，所有平台的从业人数都有所增加，特别是主机游戏平台的从业人数比上年大幅增加72.3%。

2022年游戏流通企业(网吧、街机游戏厅)从业人数为35,833人，比前一年的36,594人减少了2.1%。网吧的从业人数减少了2.9%，而街机游戏厅的从业人数增加了30.6%。

表 5 游戏产业从业人数（2019~2022年）

（单位：名，%）

区分		2019年	2020年	2021年	2022年	2022年构成比	2021年对比增减率
游戏制作及发行企业	电脑游戏	13,430	14,600	13,124	15,024	17.8	14.5
	手机游戏	23,057	27,028	29,015	30,113	35.7	3.8
	主机游戏	1,348	1,110	1,204	2,075	2.5	72.3
	街机游戏	1,555	1,572	1,919	1,302	1.5	-32.2
	小计	39,390	44,310	45,262	48,514	57.5	7.2
游戏流通业	电脑游戏厅运营业	48,810	38,154	35,738	34,715	41.2	-2.9
	电子游戏厅运营业	957	839	856	1,118	1.3	30.6
	小计	49,767	38,993	36,594	35,833	42.5	-2.1
合计		89,157	83,303	81,856	84,347	100.0	3.0

1）即使当前正在运营项目，但如果在该年度没有产生销售额的企业也被归类为“停业”的企业，并将其从总体样本中排除。
2）从2020年开始网吧从业人数反映了国税厅现状的数值，而在2019年及之前，则是按照统计厅的标准编制，因此比较时需要注意。

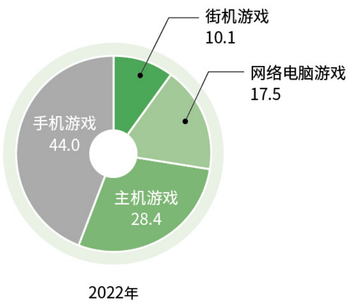
1-7. 2022年世界游戏市场同比仅增长0.9%

2022年世界游戏市场规模比上年增长0.9%，达到2,082.49亿美元。这与2021年的增长率5.9%相比，大幅放缓。2022年全球游戏市场面临着巨大的挑战，受到了从新冠疫情的复苏、替代性娱乐形式的出现，到全球经济环境的变化，如全球利率上升等复杂因素的影响，这些都对游戏市场的增长产生了影响，因此未来游戏市场的展望更加困难。

从游戏平台来看，以2022年为准，电脑游戏市场的增长率仅为0.1%，手机游戏市场的增长率为-0.5%。主机游戏在2021年增长2.4%，而在2022年增长率略高，达到了2.6%。这是因为新主机游戏的上市和主机游戏玩家的扩张，预计这种增长趋势到2023年将上升到6.1%。街机游戏市场虽然摆脱了最坏的状况，但增长势头正在减弱。从2020年-25.9%的负增长，到2021年增长9.5%，到2022年下降到4.1%。预计从2023年到2025年，街机游戏市场的增长将基本上停滞在1.0%的水平，尽管与新冠疫情危机无关，但要恢复街机游戏市场的增长势头，需要有像生活方式变化等的新动力。

图 6 各平台的全球游戏市场占有率（2022年/2025年）

（单位：%）

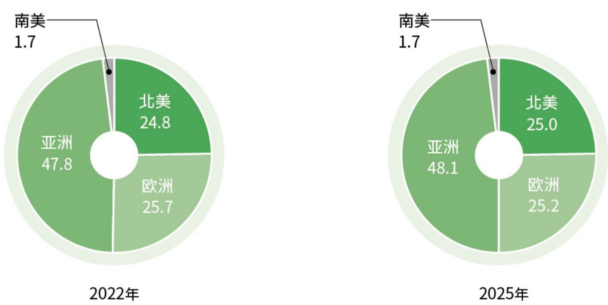


*资料：PWC 2023; Enterbrain 2023; JOGA 2023; iResearch 2023; Playmeter 2016; NPD 2023

比较各游戏平台的前景,手机游戏的游戏市场占有率预计从2022年的44%将上升至2025年的46.3%,街机游戏从2022年的10.1%小幅下跌至2025年的9.2%,继续保持微弱的下降趋势。主机游戏虽然从28.4%小幅下滑到2025年的27.9%，但是预计市场规模仍将保持稳定。电脑游戏将从2022年的17.5%下降到2025年的16.6%，受到手机游戏增长的市场侵蚀，这一趋势预计将持续。

图 7 各地区的世界游戏市场占有率（2022年/2025年）

（单位：%）



*资料：PWC 2023; Enterbrain 2023; JOGA 2023; iResearch 2023; Playmeter 2016; NPD 2023

第二章　2022年韩国游戏产业主要问题

1. 废除游戏停服制度，实行游戏时间选择制

2022年1月1日正式废除了游戏停服制度。游戏停服制度是从0点到上午6点的深夜期间禁止向未满16岁的青少年提供网络游戏服务的制度。为了保障青少年睡眠权和防止过度沉迷，于2011年通过《青少年保护法》的修订，引进了该项制度。

政府将预防青少年过度沉迷于游戏的保护措施统一为“游戏时间选择制”。游戏时间选择制是指未满18岁的青少年本人或法定代理人提出要求时，可以按照自己的意愿自由选择游戏时间的制度。政府将重点放在赋予监护人和子女调节游戏时间的自律权上。为了减少强制性的语气，该制度在2012年引入时被称为“选择性停止制度”，后来进行了改名。

游戏停服制度废除后不久，现场出现了一些混乱情况。这是因为游戏时间选择运营系统尚未即时建立。为了设定游戏时间，家长或用户需要访问各个游戏公司的官方网站。问题是每家游戏公司的申请样式和申请地点不同，而且可访问性较差。虽然游戏文化财团网站上列出了了涉及的公司，如NEXON、NC软件、Netmarble、NHN、Riot Games 等，但只能以外链方式进行访问。

政府为了使游戏时间选择制的运作更加有力，决定由游戏文化财团负责统一申请代办和投诉处理工作。在系统建立期间，主要游戏公司也积极参与并支持这项服务，以配合政府的政策目标。

随着解除长达十年之久的束缚游戏产业的强制性停服制度限制，游戏业界内部也为了制定青少年保护措施以及普及正确的游戏文化而做出了相应的努力。游戏识字教育的推行成为各个游戏公司的倡议，旨在增进对游戏环境和文化背景的理解，提供正确的游戏使用信息。

在家庭中，家长对于游戏指导的重要性也日益增加。对此，文化体育观光部、韩国文化信息振兴院、游戏文化财团等也开展了“家长理解游戏教育”和扩大家庭间交流机

会的“游戏文化家庭营”等活动。

游戏时间选择制度之所以具有重要意义，是因为它不是由政府规章制度或外部控制来管理，而是通过青少年游戏玩家和监护人之间的沟通，来预防游戏过度沉迷。对青少年用户来说，它保障了自主性，对监护人来说，则保障了教育权。未来的任务是确保稳定的综合服务运营，扩大国内外游戏公司的参与。作为确保与游戏共同度过健康生活的最低限度安全措施，需要更多游戏公司积极合作和支持，以巩固其地位并提高社会认知度。

2. 积分奖励型街机游戏设施试点运营

自2007年以来，经过长达16年的时间，积分奖励型街机游戏（Redemption Game）设施的试点运营得以实施。这一举措旨在寻找处于低迷状态的街机游戏产业的出路。

延新川的蜡笔小新游戏厅和仁川松岛的Fun It等试点店已经开业，吸引了家庭用户的光顾。除了设有积分奖励型街机游戏机的游戏厅外，还结合了硬币卡拉OK、台球厅、网吧等多种设施，展示了其作为新型休闲文化空间的发展潜力。这些地点位于综合购物中心，包括影院、咖啡馆和购物中心，扮演着家庭娱乐文化空间（FEC）的角色。

积分奖励型街机游戏是一种根据玩家的能力决定游戏结果，并根据游戏结果提供奖品作为奖励的街机游戏。玩家可以通过积累得分或得分记录的票券来兑换所需的商品。

在海外，积分奖励型街机游戏已经成为常见的家庭娱乐场所的一部分，与普通餐厅、家庭餐厅和快餐连锁店等结合，构建了家庭式综合娱乐空间的要素。然而，在韩国长期以来一直被法律禁止。这一切始于2006年因高度的赌博性和成瘾性而引发社会争议的“Sea Story”事件。

随后为了提升街机游戏产业形象，将其培育成具有增长动力的文化产业，放松管制的讨论开始展开。2021年，包括ANA Entertainment、Youngbae、Pang和Pattesone在内的4家企业获得了放宽管制（管制沙盒）制度的批准，被选定为试点企业。

试点运营的积分奖励型街机游戏设施与赌博因素浓厚的游戏机设备划清了界限。它只引入了全年龄段适用的游戏、机械式游戏、根据玩家能力的游戏和具有电子支付手段的IC卡等游戏。通过记录充值、积分累积和奖品兑换等信息，透明地记录在电脑系统中，阻止了其可能演变为赌博性游戏的可能性。

游戏管理委员会也与美国街机游戏协会签订了合作协议。他们将密切合作，促进积分奖励型街机游戏的发展，共同研究相关产业的培育和主要问题，并进行专业人才培训等。他们的目标是通过重新评估游戏厅的效果，打造新型的家庭娱乐中心，并提升国内街机游戏产业的正面形象。

试点运营积分奖励型街机游戏设施摆脱了长期以来对该行业施加的法律限制，将其打造成为家庭和情侣休闲游戏的场所，为其带来了新的增长机会。试点经营者也在逐步改善街机游戏的形象，努力将其打造成为人人都能轻松找到的游乐场所。

提升市场知名度以扩大市场影响力是一个挑战。虽然试点店铺已经开业，但在吸引家庭消费者和商业表现方面略显不足。街机游戏机制造商也应该尝试与K-pop等其他类型的内容进行融合，开发出多样化的游戏，以提高其出口竞争力。

试点运营将持续到2024年，根据试点运营的结果，将进行对积分奖励型街机游戏在国内引入的适宜性、详细标准和法律要求的整理，以及综合性的商业可行性评估和法律规范的推进。

3. 被认可为文化艺术的游戏

2022年，韩国国会通过了《文化艺术振兴法》的部分修订案，为将游戏纳入文化艺术范畴提供了法律依据。这项修订案是在2020年11月由民主党议员赵承来代表提议的。修正案的目的是将游戏作为综合艺术形式，涵盖了影像、美术、小说、音乐等多种艺术类型，以支持和培育游戏。这一举措受到了游戏行业内外的欢迎，因为它有助于改善人们对游戏的负面认知，并为相关政策提供了文化艺术促进的视角，而不是仅仅是管制。

《文化艺术振兴法》于1972年颁布。当时，文化艺术范畴仅包括文学、美术、音乐、演艺、出版等5个项目。此后，1987年增加了舞蹈、话剧、电影，1995年增加了应用美术、国乐、摄影、建筑、语文，2013年增加了漫画。直到游戏被纳入文化艺术

范畴，历时约50年。

虽然已经确立了法律依据，但为了使游戏得到充分的文化艺术认可，需要相关法律和制度的完善以及支持力度。在2022年11月举办的国际游戏展览会G - Star期间进行的“游戏，成为文化艺术!”研讨会上，提出了需要界定游戏独有的艺术特性和身份的建议。另外，还在讨论支援专业艺术团体等详细条款和反映文化艺术特性的游戏产业现状调查。

修订案通过以后，为了广泛宣传游戏所具有的文化艺术价值，还举办了各种各样的活动。除了游戏公司为用户策划的活动之外，还举行了可以看到作品性的多个游戏中的原声(OST)的管弦乐队演出和利用游戏知识产权(IP)的艺术展示会等丰富多彩的活动，引起了广泛关注。

韩国游戏论坛和国会议员研究团体国会文化内容论坛在国会大会议室举办了“游戏文化艺术音乐会”，让人们切身感受到社会氛围的变化。在过去的第19届国会中，曾提出将游戏定义为类似毒品的成瘾行为，并将其视为需要治疗的对象的法案。对此为了表示反对，光化门广场还进行了演奏游戏主题曲的闪电游行。时隔8年，国会再次举行了以游戏原声音乐为主题的音乐会。

游戏文化艺术音乐会由执棒大邱MBC交响乐团的前任指挥家的Jinsol担任代表的“FLASIC Game Symphony Orchestra ”演奏WEBZEN, Netmarble, Smile Gate、NCsoft、KRAFTON、Pearl Abyss、Com2uS 、KAKAO Games、NEXON、NHN、NEOWIZ等代表游戏原声音乐表演，同时播放了游戏影像,受到了好评。

4. Gamescom首个三冠王《P的谎言》，挑战主机游戏市场

在德国科隆举办的欧洲最大游戏展“Gamescom 2022”上，带来了意想不到的收获。NEOWIZ Round 8工作室开发的角色扮演单机游戏(RPG) 《P的谎言》在Gamescom颁奖典礼上获得了“最佳动作冒险游戏”、“最佳角色扮演游戏”和“最受期待的PlayStation游戏”等三项大奖，成为了游戏展的三冠王。

韩国游戏作品在Gamescom上获奖是史无前例的，《P的谎言》是首个获奖的韩国游戏。Gamescom与美国E3和日本东京游戏展并称为全球三大游戏展之一。自2009年起，该展览每年在德国科隆举办。这是韩国开发团队在全球游戏爱好者和游戏产业

人士的关注下，以自主开发的IP和游戏在世界级活动中取得的重大成就。

《P的谎言》以19世纪末的维多利亚时代为背景，将经典故事《木偶奇遇记》改编为残酷童话，呈现出独特的世界观。逼真的图形和需要熟练操控技能的高难度战斗，突显了游戏的魅力。独特的武器系统，可以分离并组合刀刃和手柄，也引起了人们的关注。

NeoWiz在2022年的游戏展上以独立展位参展，展示了《P的谎言》的新预告片，并展示了两小时的演示，让游客可以亲自体验。当时展会现场因为想要提前试玩《P的谎言》而前来展位排队的游客络绎不绝。

《P的谎言》不仅在韩国国内，而且在海外都受到了广泛关注，并迅速成为全球备受期待的作品，激发了韩国游戏公司在主机游戏机领域的连续挑战。在韩国釜山举办的G-star游戏展上，首次向国内玩家展示了游戏，提高了游戏发售的期待。除了丰富的内容外，还宣布了支持多种平台，包括索尼 PlayStation（PS）4和PS5、微软Xbox系列、PC（Steam）等。

《P的谎言》荣获Gamescom三冠王，给对在线和手机平台依赖度较高的韩国国内游戏业界带来了新鲜的冲击。作为一款Triple-A级别的新游戏，其技术力和游戏性得到了认可，从这一点上具有非常重大的意义。同时，作为一款排除了随机物品的过度盈利模式的套装游戏，也受到了国内外游戏玩家的欢迎。

5. 三年后回归线下的游戏秀

随着席卷全球的新冠疫情大流行进入控制阶段，各种线下展示活动已经重新开始。每年11月在釜山举行的韩国最大的游戏展“G-Star 2022”也以空前规模华丽复苏。

据G-STAR组委会估算，G-STAR 2022的参观人数达到了18万4千人。就在活动举办前几周，首尔的梨泰院发生了一起悲剧性事件，引发了对展览会安全的担忧，但是没有发生任何事故。组委会与文化体育观光部、釜山市以及警察、消防等相关机构密切合作，将安全置于首要位置，确保了活动的顺利进行。他们通过限制各区域的入场人数来控制人流密集，并且相比往年，安全管理人员的数量也增加了一倍以上。

G-STAR的主要赞助商WeMade以及游戏公司如Nexon、Netmarble、Kakao Games、Krafton和Neowiz等都搭建了大型展台，展示了各种新作。各游戏公司的管

理层和核心开发团队也来自在展会现场迎接参观游客，并展现了积极的沟通态度。除了展示新作外，还设置了体验型展台，让游客可以以多种方式享受和沉浸在主要游戏IP生态系统中，这一点也引人注目。

首次在釜山BEXCO第二展馆3楼额外设置的BTC 2展馆吸引了人们的关注，这里是主要的次文化游戏展位以及Neowiz的《P的谎言》国内首次展示的地方。Shift Up的《胜利女神：尼姬》相关活动在Level Infinite展台上进行，而以《原神》闻名的中国miHoYo展台则成为了人们购买游戏IP周边商品的热门地点，一开展馆大门就爆发出购买游戏IP商品的热潮。

期待已久的线下活动的举办也激活了游戏业务活动。比去年扩大了2.5倍以上的企业间交易（BTB）展区吸引了来自世界各地的付费买家，总共有2,213人参与了为期三天的活动。作为附加活动，开发者大会也取得了成功，知名的《怪物猎人》系列制作人辻本亮久等人在讲台上发表讲话，获得了热烈的响应。

在G-Star 之前，德国的“德国科隆游戏展”和日本的“东京游戏展”也展示了在线活动和线下展览同时进行的正常情况。于8月举行的德国科隆游戏展有53个国家的1,100家公司参加，有来自100个国家的26.5万名观众观看。除了三冠王作品《P的谎言》的获奖者Neowiz外，韩国主要游戏公司如Nexon、LINE Games、Krafton等也通过参加游戏展来寻求海外市场机会。由韩国文化信息振兴院运营的韩国联合馆有15家企业参加，与欧洲当地的发行商进行了商务洽谈及签约。

从8月15日开始，为期四天的“东京游戏展2022”在日本千叶县幕张国际展览中心举行，有来自日本的299家公司、166家海外公司等共计465家公司参与。然而，索尼、微软、任天堂等三家主要游戏主机公司未参加东京游戏展，给人留下了遗憾。在展会期间，共计有13.8192万名游客参观了展馆。

美国的“E3展”在此前宣布取消线下活动后又改变主意，推进了正常的举办计划，但最终还是因为各种问题搁浅。由美国娱乐软件协会主办的E3展是世界规模最大的游戏展之一。在经历了新冠疫情之后，主要游戏公司改为参加自己的活动而不是参加E3展，导致了一定的影响。

中国最大的游戏展“ChinaJoy”也因中国国内新冠疫情再次爆发，以及上海市的封锁等影响而推迟了展会日期，最终取消了线下活动。ChinaJoy只以在线形式举办，通过元宇宙空间构建展馆，并通过体验型活动探索非接触式游戏展的可能性。

6. 成为主流的亚文化流派

至今被称为亚文化的游戏，在今年展现出明显的市场增长势头，巩固了其地位。韩国开发的游戏出口到被认为是亚文化领域的母国日本并取得了成功的案例也屡见不鲜。

在韩国国内，亚文化游戏主要以引发人们对日本动画片的图像设计为基础，并以与多种未知形态的角色互动为主要内容。以前，亚文化本身被视为特定爱好者群体的专属，但是随着对漫画、网络漫画、网络小说、动画片、游戏等的需求增加，亚文化已经发展到了接近大众文化的水平。

由NEXON Games开发的《蔚蓝档案》被誉为纯国产亚文化游戏IP的代表性成功案例。在韩国和日本的应用市场中，该游戏进入了畅销榜第一名，取得了销售前5名的商业上的成功。虽然游戏中部分插图的选定性问题引发了游戏管理委员会等级重新分类的争议，但通过持续的更新和与用户的沟通，稳固了其在大众中的地位。该IP的扩展，如以游戏原声音乐为基础的专辑包装、艺术书籍、漫画书、角色模型商品等也得到了好评。

《胜利女神:尼姬》在发布一个多月后就实现了全球销售额达1亿美元（约合1306亿韩元）。这是一款由Shift Up开发，中国腾讯旗下海外发行子公司Level Infinite负责运营的亚文化射击RPG。该游戏在日本也取得了高销售业绩，证明了韩国IP的竞争力。该游戏还进入了北美市场，在全球销售额中，约15%来自美国。

在韩国国内移动游戏市场上，多人在线角色扮演游戏（MMORPG）类型在销售榜单上占据了重要位置。亚文化游戏每当推出新作品、重要更新或促销活动时，都能迅速进入销售排行榜的前列，彰显了其存在感。

中国游戏公司开发的亚文化游戏在韩国国内市场也展现出了强劲的实力。备受全球欢迎的中国游戏《原神》以及诸如ZLONGGAME的《Archeland》和AISNO GAMES的《无期迷途》等多款中国游戏经过本地化后进军了韩国市场。

亚文化游戏的迅速崛起对国内游戏产业界也产生了不小的影响。主要游戏公司在面向2023年的下一个作品中发布了次文化游戏的阵容，并开始着手确保自身的IP。这促进了游戏IP基础上的生态系统扩张，并推动了游戏IP的多样化。

亚文化游戏也引发了对全球市场潜力巨大增长的期待。中国开始逐渐解开对外国游戏的限制，将亚文化称为“二次元文化”，在年轻人中间产生了爆炸性的需求。

7. 备受期待的独立游戏，市场关注度扩大

大型游戏公司主要新作的开发和发布受到延迟，使得人们对独立游戏的关注度增加。一些公司不仅仅在社会责任层面上支持独立游戏生态系统，而且将其作为新的增长动力，大力支持商业化和出版。独立游戏凭借其独特和创新的特点取得了商业成功，逐渐出现在游戏行业的各个领域，为整个游戏行业注入了活力。

由NEOWIZ负责出版的《小骨：英雄杀手》是韩国封包独立游戏首个突破100万套的游戏。该游戏于2021年1月在全球电脑游戏分销平台Steam上正式发布，距今已有一年多的时间。开发商SouthPAW Games是由全南大学游戏开发社团成员组建的公司。

获得2022年韩国游戏大奖独立游戏奖的《闪避刺客》也是由NEOWIZ出版的。这部作品以朝鲜赛博朋克风链式动作的独特概念引人注目。大型游戏公司通过负责服务运营和营销等方式，充分发挥独立游戏所具有的新颖性和未经打磨的魅力，以期获得更多的协同效应。除此之外，NEOWIZ还通过利用全球累计下载量超过两千万次的《猫和汤》IP，在多个方面拓展业务，取得了对独立游戏投资的成果。

经营STOVE INDIE的Smile Gate也被认为是支持韩国独立游戏生态系统发展的坚实后盾。STOVE INDIE是一家专门提供电脑独立游戏的分销平台。该平台支持为入驻独立游戏提供服务运营和市场推广。它还协助进行了韩文本地化工作，以便让海外有前途的独立游戏在韩国市场上获得更好的体验。

StoveIndie已经入驻了500多种独立游戏，成为具有不同游戏喜好的用户和新兴开发者之间的桥梁。通过这一举措，游戏世界的素材和类型的多样性得到了增加。随着能够在一个平台上方便地接触到高质量的独立游戏，独立游戏用户数量也在逐渐增加。

中型游戏公司Gravity也积极推进作为一项新业务的独立游戏。他们通过支持基于《仙境传说》IP的独立游戏开发或挖掘新的有潜力的IP来发掘独立游戏公司，并参加国内外游戏展览会等活动。

NEXON和NCSOFT等主要游戏公司也在持续支持独立游戏生态系统的发展。

全球平台运营商谷歌、苹果、微软、索尼、任天堂等也不断推出支持独立开发者的政策，包括降低手续费等。韩国Unity于2022年首次举办了独立游戏开发活动"Unity Game Jam"。

在政府层面，文体部下属的韩国文化信息振兴院正在开展面向独立游戏团队的游戏策划支持项目。除了向优秀作品提供激励奖励外，还提供专门的咨询服务，帮助游戏

开发和公司设立。

8. 成为政界关键词的游戏

在总统选举之际，游戏成为政界的主要议题。各个政党的总统选候选人将游戏相关政策作为主要承诺，并在游戏YouTube频道上透露了对游戏认知以及未来政策方向的看法。法案的提出也涵盖了游戏分级制度、随机物品信息披露、电子竞技的推广等各种问题。

两党总统候选人之所以争先恐后地发表游戏相关公约，是因为有分析认为20、30年龄段已经成为了核心支持层。除了政策承诺外，游戏亲和性活动也在选举游说期间持续进行。

时任韩国国民力量总统候选人的尹锡悦强调解决游戏市场的不公平现象。他的主要承诺包括完全公开用户投诉的随机物品信息、设立游戏小额诈骗专门调查机构、解决残障人士游戏接入障碍、引入电子竞技地方认可制度等。

共同民主党候选人李在明和当时的国民之党候选人安哲秀也把随机物品信息公开作为主要承诺。三位候选人都在Play to Earn（P2E）游戏和非同质化通证(NFT)上持保留和慎重的意见，而对游戏使用障碍表明了反对立场。

尹总统当选后，文化体育部致力于修改《游戏产业促进法》，以强制公开随机物品信息，以实现竞选承诺。法务部长韩东勋也预告了将引入《数字内容合同法》，以规范数字内容及相关服务的交易。其目的在于对于所谓的“扭蛋游戏”中的虚假提供概率信息、操纵概率等行为进行适当的法律追责。

尽管如此，　在引导游戏产业全面发展的政策大局和解决监管问题方面，游戏产业仍然被寄予了较高的期望。

9. 游戏行业的重要支持者：沙特石油资金

沙特阿拉伯（沙特）已成为韩国游戏产业的主要投资者。凭借巨额石油资金，沙特已经成为全球游戏公司的股东，并向公司如Nexon和NCSOFT投资了数万亿韩元，成为主要股东。与韩国信息技术（IT）企业建立合作关系的沙特王储穆罕默德·本·萨勒曼也展现出对游戏和内容的特别关注，进一步提升了投资期望。

以石油产业为中心积累财富的沙特正试图通过积极改善体制转变为技术中心国家。正在建设的沙漠中央的170公里规模的智慧城市“Neom City”旨在建立一个100%使用可再生能源的环保科技城市。游戏和内容已被设定为沙特未来的核心增长动力。

由本·萨勒曼王储领导的沙特国家财富基金（PIF）的资产规模已达到令人瞩目的5000亿美元。PIF成立了游戏相关公司“SABBY Gaming Group”，并购了Activision Blizzard、Capcom、Take-Two、Electronic Arts（EA）等公司的股份。自年初以来，PIF已多次投入约247.6亿日元，以确保在东京证券交易所上市的Nexon股份，成为其前两大股东。PIF还收购了NCSOFT的股票，占比达到了9.26%，成为其第二大股东，仅次于NCSOFT的代表金泽辰。PIF对Nexon和NCSOFT股份的投资总额已超过230亿美元。

开发《胜利女神:尼姬》的Shift Up也是受到沙特阿拉伯极大关注的游戏公司之一。PIF和沙特风险投资公司的相关人士访问了Shift Up的首尔总部。在由两国政府和经济界300名人士参加的“韩-沙特投资论坛”上，沙特投资部和Shift Up签订业务协议，承诺在游戏领域展开全面合作。

WEMADE正在通过区块链业务推进进军中东市场。其目标是在沙特NEOM City 构建基于区块链的数字经济。为此，公司还在阿拉伯联合酋长国（UAE）设立了子公司。

沙特PIF计划到2030年为止，通过Savvy Gaming group向游戏产业投资超过387亿美元。基于此，他们的目标是将沙特本土的游戏公司扩展到250家，并确保在全球前300款游戏中有30款以上由沙特本土游戏公司制作。由于本国游戏产业的基础设施还处于初级阶段，因此他们通过积极的海外投资来吸引全球游戏公司并获取高端海外人才。

10. 游戏平台多元化

在手机平台方面具有优势的韩国游戏公司正式开始向电脑和主机游戏领域扩大其领域。这是为了将舞台拓展到全球市场，开辟新的市场，并多元化收入结构。人们也开始关注支持多平台和跨平台游戏的兴趣，让玩家可以在任何环境下自由享受游戏。与此同时，通过投资海外游戏开发商或运营工作室来进行新挑战也变得更加活跃。

由KRAFTON推出的《木卫四协议》是韩国国内游戏公司向恐怖游戏这一非人气体裁的Triple-A级主机游戏发起挑战的游戏，从这一点来看，具有很大的象征性意义。这一举动得到了受欢迎的《死亡空间》系列的格伦·斯科菲尔德导演以及北美工作室的经过验证的海外开发团队的支持，被认为已经确立了作为全球游戏公司的地位。

Kakao Games通过其欧洲子公司对著名实时战略模拟游戏(RTS)开发商聚集的美国游戏公司冰霜巨人工作室(Frost Giant Studios)进行了240亿韩元规模的战略性投资。冰霜巨人工作室由星际争霸的核心开发团队组成。此前一直专注于手机游戏领域的Kakao Games的此举被解读为为进军全球电脑游戏市场做准备。

NEXON、NCSOFT、Netmarble 、Neowiz等公司也介绍了将通过电脑、主机平台推出的重要新作品，为进军国际市场做准备。与被视为主机游戏不毛之地的韩国不同，在北美、欧洲等西方市场，主机游戏依然占据着较大的比重。每到年底评选出最佳游戏的“年度最佳游戏(GOTY, Game of the Year)”也大部分出自主机游戏市场。

韩国游戏产业以手机平台、大型多人在线角色扮演游戏（MMORPG）和随机项目（BM）为基础，确实在短时间内取得了快速增长。但与此同时，他们也面临着来自游戏用户的诸多批评和要求变革的呼声。韩国主要游戏公司进军主机和电脑平台的挑战不仅仅是为了实现销售增长这一经营指标，更是为了作为全球游戏企业实现新的飞跃，因此备受关注。

第三章　游戏使用特性

1. 全体游戏使用率

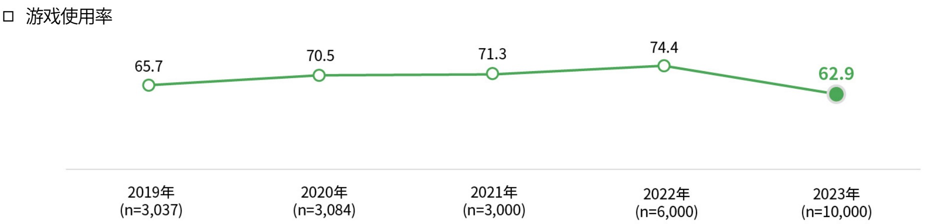
对全国10~64周岁的普通国民(全体受访者(n=10,000))进行了最近一年内(2022年6月以后)是否使用游戏的调查，结果显示62.9%玩游戏，与2022年的调查结果相比减少了11.5%p。

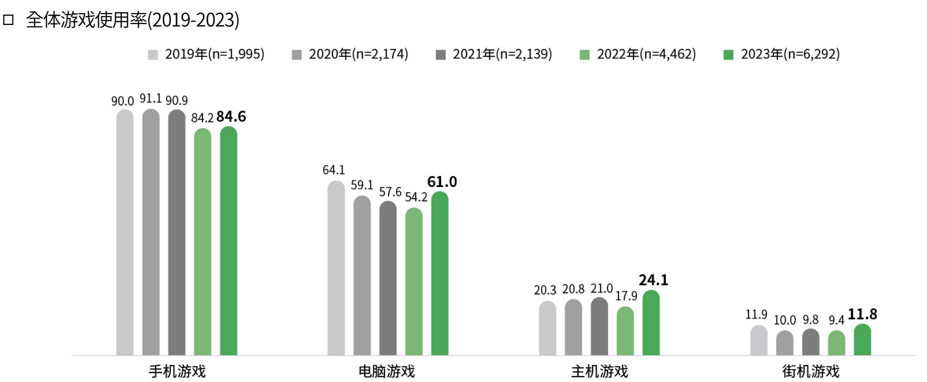
在所有游戏用户(n=6,292)中，根据不同游戏平台的使用率，发现“手机游戏”(84.6%)是利用率最高的游戏平台，其次是“电脑游戏”(61.0%)、“主机游戏”(24.1%)和“街机游戏”(11.8%)。

全体游戏使用率自2020年以来呈现增长趋势，但再次下降至2019年的水平。

图 8　游戏使用率

(单位：%)





2. 各平台游戏使用率

2-1. 电脑游戏

全体受访者(n=10,000)最近一年(2022年6月以后)的电脑游戏使用率为38.4%，比2022年的电脑游戏使用率40.3%减少了1.9%p。

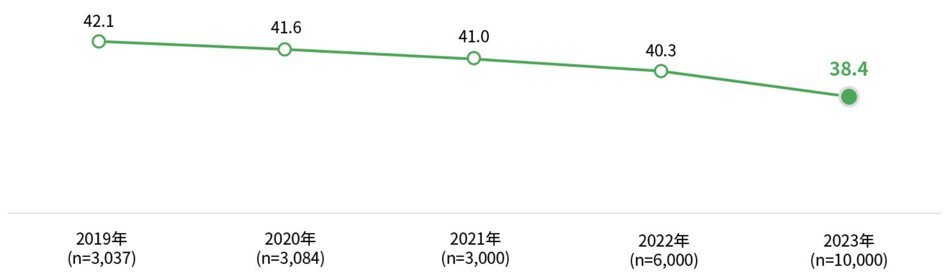
从受访者的特性来看，在电脑游戏使用率方面，男性明显高于女性，在30岁以下年龄段中比率较高。

电脑游戏使用率从2019年开始呈现持续减少的趋势。

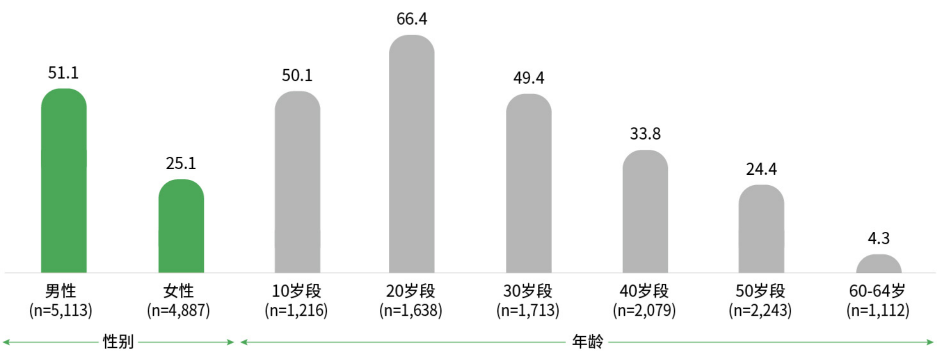
图 9 电脑游戏使用率

(单位：%)

□ 全体调查对象中电脑游戏使用率(2019-2023)



□ 全体调查对象中电脑游戏使用率性别/年龄分布



2-2. 手机游戏

全体受访者(n=10,000)在最近一年内(2022年6月以后)的手机游戏使用率为53.2%，与2022年的手机游戏使用率62.6%相比减少了9.4%p。

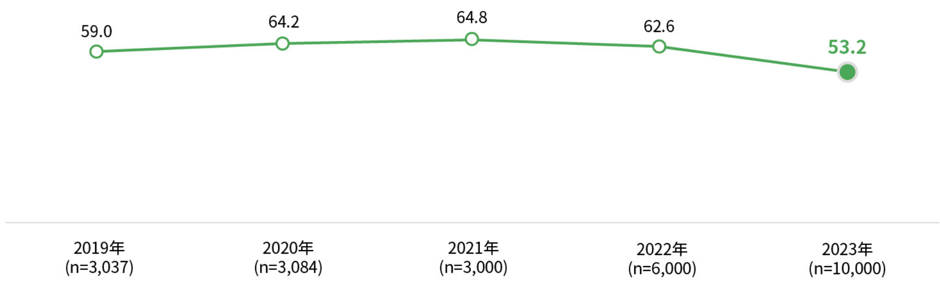
从受访者的特性来看，每10名男性中有6人(57.8%)玩手机游戏，每10名女性中有5人(48.5%)玩手机游戏。从年龄段来看，手机游戏使用率与电脑游戏一样，在30岁以下的年龄段中比率较高。

手机游戏使用率从2021年开始呈现减少趋势。

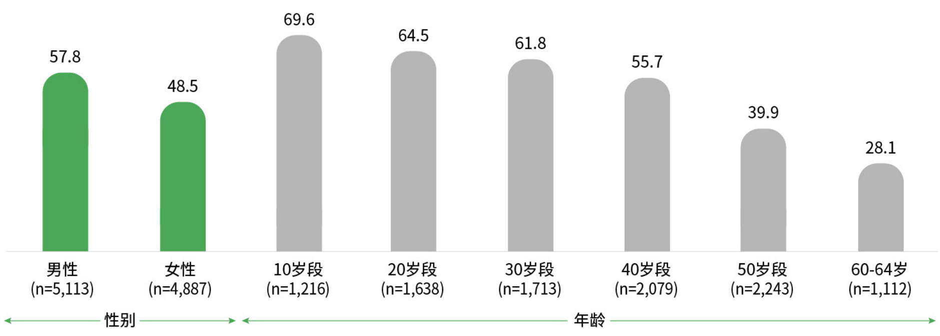
图 10 手机游戏使用率

(单位：%)

□ 全体调查对象中手机游戏使用率(2019-2023)



□ 全体调查对象中手机游戏使用率性别/年龄分布



2-3. 主机游戏

全体受访者(n=10,000)最近1年内(2022年6月以后)主机游戏使用率同比增加1.8%p，达到了15.1%。

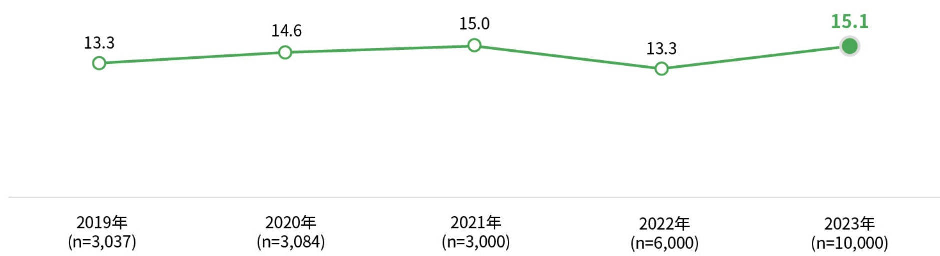
据调查，从受访者的不同特性来看，男性比女性主机游戏的使用率更高，20~40岁段的使用率较高。

主机游戏使用率在2022年小幅减少后，重新恢复到2021年的水平。

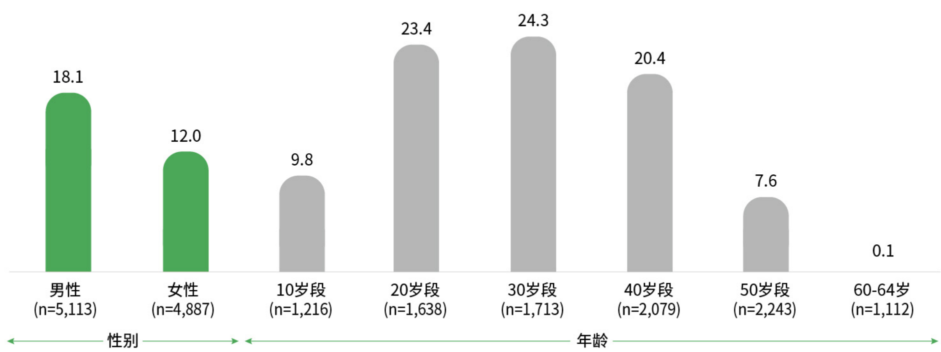
图 11 主机游戏使用率

(单位：%)

□ 全体调查对象中主机游戏使用率(2019-2023)



□ 全体调查对象中主机游戏使用率性别/年龄分布



2-4. 街机游戏

据调查，全体受访者(n=10,000)在最近一年内(2022年6月以后)街机游戏使用率为7.4%，相比于2022年的7.0%，街机游戏使用率增加了0.4%p。

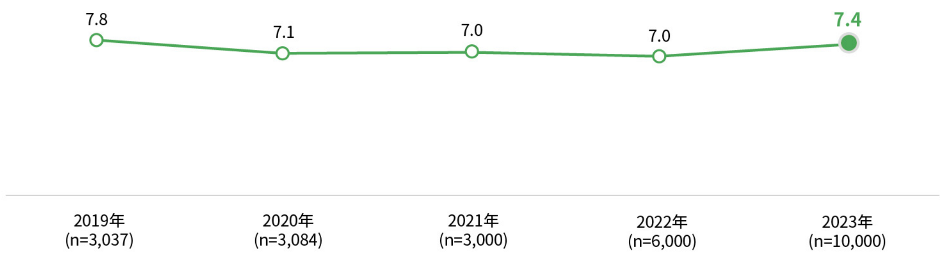
从受访者不同特性的街机游戏使用率来看，男性(7.6%)和女性(7.3%)的水平相似，20~30岁段(20岁段：12.7%，30岁段：10.8%)的使用率较高。

街机游戏使用率从2020年开始呈下降趋势，今年有小幅回升。

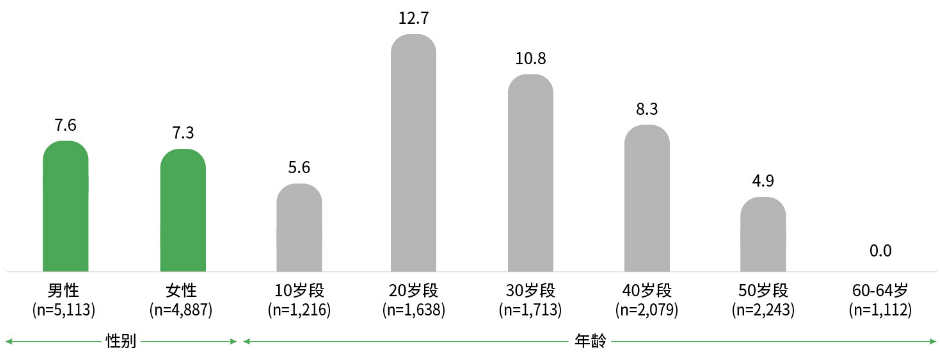
图 12 街机游戏使用率

(单位：%)

□ 全体调查对象中街机游戏使用率(2019-2023)



□ 全体调查对象中街机游戏使用率性别/年龄分布



2023 GAME INDUSTRY WHITE PAPER

Ministry of Culture, Sports and Tourism

KOCCA
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