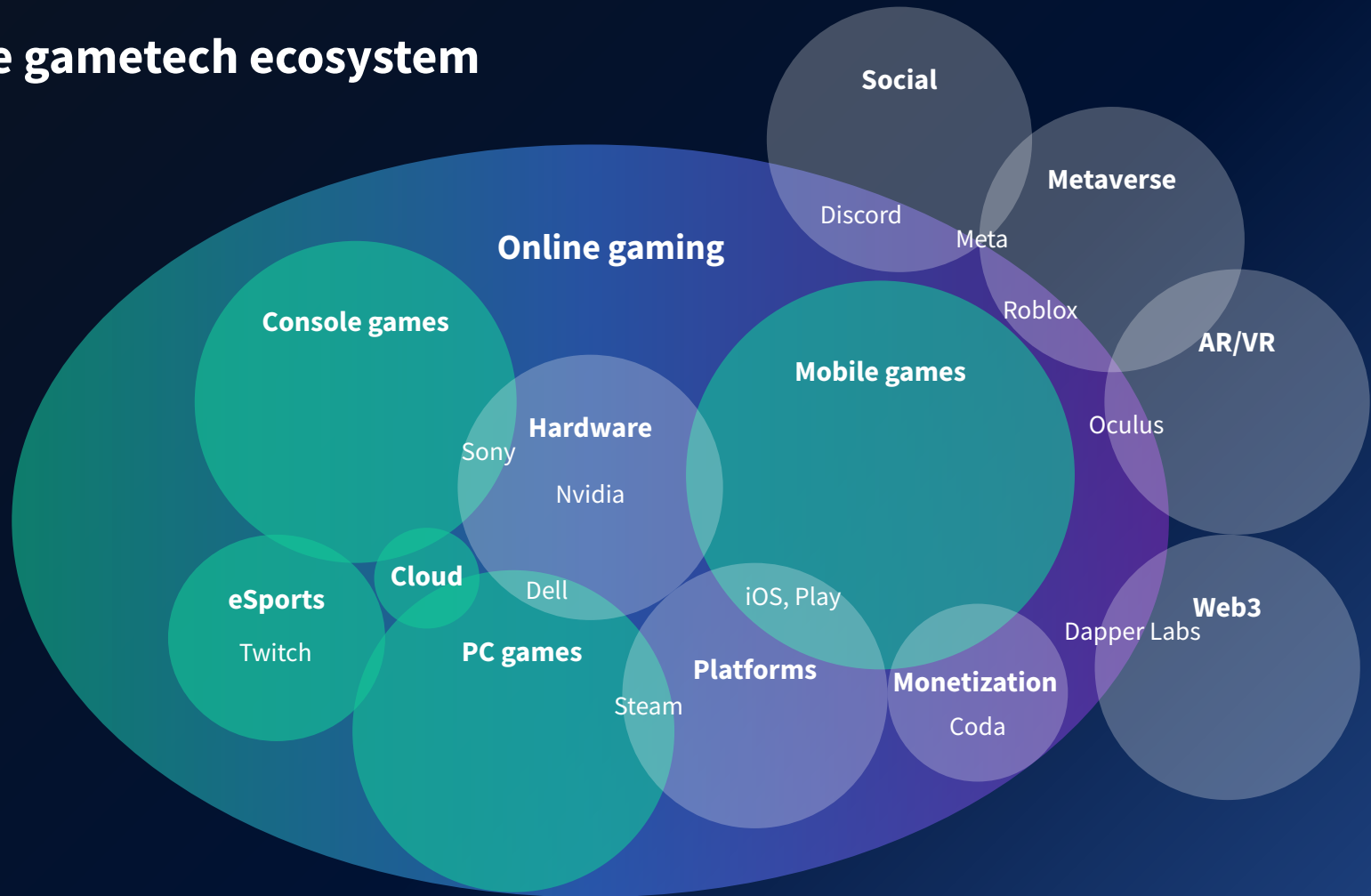


# The gametech ecosystem



Loading...

# Gaming funding update

Watch July 2022 event



  
INDEX  
GAMING SUMMIT  
2022

WELCOME

# #indexgamingsummit speakers 2022



Dan  
Sturman

CTO  
Roblox



Caroline  
Hyde

Co-host  
BloombergTV



Sebastian  
Knutsson

Co-Founder & former COO  
King



Dean  
Takahashi

Lead Writer  
GamesBeat



Ilkka  
Paananen

Co-Founder & CEO  
Supercell



Liz  
Hamren

COO  
Discord



Nick  
Fajt

Co-Founder & CEO  
Rec Room



Danny  
Rimer

Partner  
Index Ventures



Maneet  
Khaira

Co-Founder & CEO  
Backbone



Damir  
Becirovic

Partner  
Index Ventures



Ryan  
Wyatt

CEO  
Polygon Studios



Jeff "Jiho"  
Zirlin

Co-founder  
Sky Mavis / Axie Infinity



Sofia  
Dolfe

Partner  
Index Ventures



Soner  
Aydemir

Co-Founder & CEO  
Dream Games



Jenova  
Chen

CEO  
That Game Company



Stephane  
Kurgan

Venture Partner  
Index Ventures



**Daniel Sturman**

CTO  
Roblox

[Full video interview »](#)

“One of the benefits of our creator community is that they constantly surprise us and do things we would have never expected. I like that we don’t have to be the geniuses, but they will be the geniuses for us.”



**Sebastian  
Knutsson**

Co-founder & former COO  
King

[Full interview »](#)

“When we went to the public markets I think our plan was about launching eight new games per year on top of what we had, which was totally the wrong focus.”



## Maneet Khaira

Co-founder & CEO  
Backbone

[Full video interview »](#)

“Consumer adoption of cloud gaming has blown past all our expectations this year. Microsoft has gone on the record and said half of all Game Pass subscribers are playing Xbox cloud gaming.”



**Ryan Wyatt**

CEO

Polygon Studios

[Full video interview »](#)

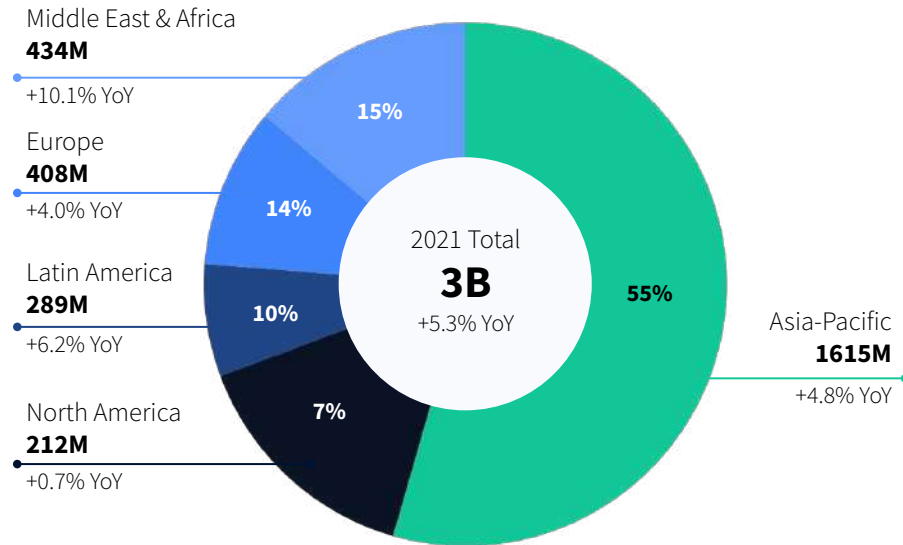
“ This pullback will unveil what is real versus what is not. A lot of people started building. Now we are going to see: what are the fundamentals.”

» Web 3 gaming startups

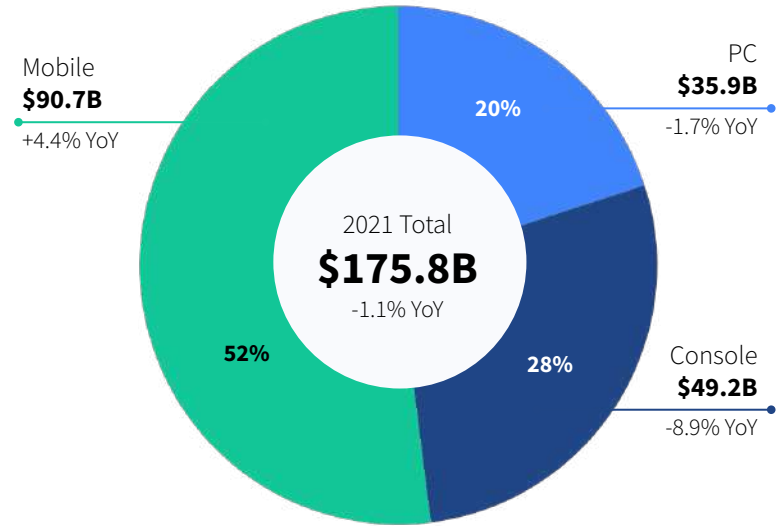
DEALROOM SIGNAL	NAME	MARKET	TYPE	GROWTH 12 months growth	LAUNCH DATE
27	<b>Planetarium</b> ★ Company that wants to return the ...	B2B gaming	blockchain commission saas	31	2018
36	<b>N3TWORK</b> ★ Creating, publishing, and scaling t...	B2C gaming mobile gaming	commission saas	99	2013
64	<b>Moralis</b> ★ Moralis is Ultimate Web3 Develop...	B2B gaming fintech crypto and defi	blockchain commission saas	80	2021
64	<b>FanCraze (formerly Faze Technologies)</b> Cricket NFT platform where fans c...	B2C gaming sports	blockchain commission saas	22	2021

# Today there are 3B gamers worldwide, generating \$175B in annual revenue; 3.5x more than music and movie box office combined (\$47B).

### 2021 Global Players per region with year-on-year growth rates

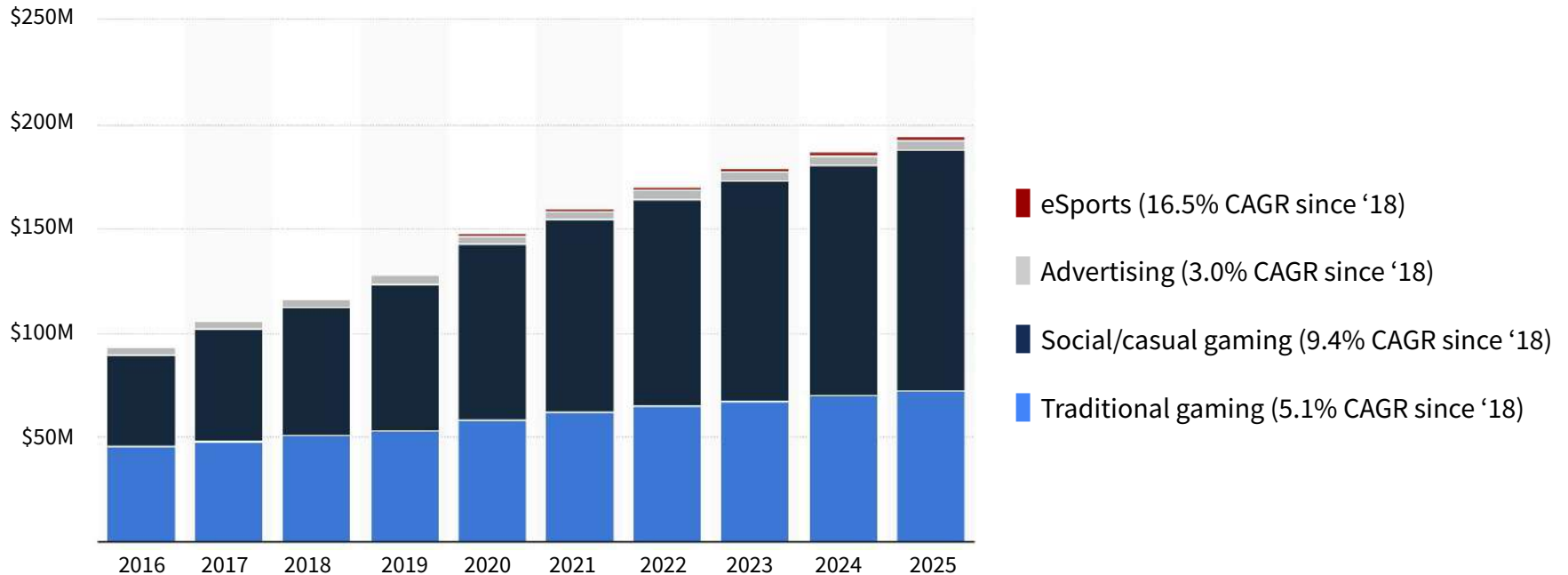


### 2021 Global games revenue per device with year-on-year growth rates



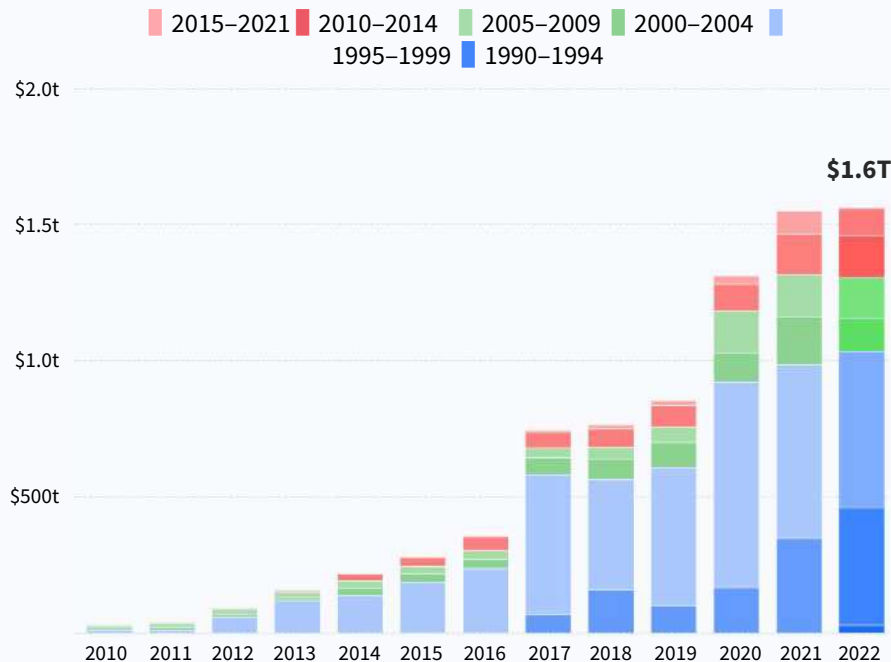
# Gaming has been growing 7.5% since 2018.

Global video gaming revenue



# The gaming startup ecosystem is now worth \$1.6 trillion in combined value, with startups founded before 2000 adding the most value.

## Enterprise value by launch year [» view online](#)

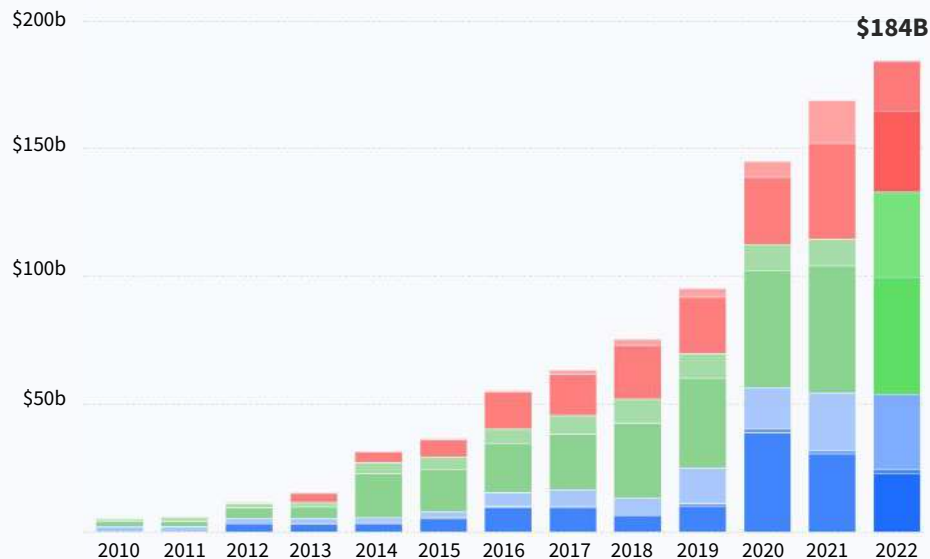


## Most valuable companies in gaming

NAME	MARKET	TYPE	GRWTH	LAUNCH DATE	VALUATION
<b>Tencent</b> ★ Chinese investment holding comp...	B2B, B2C gaming media	artificial intelligence advertising commission subscription	85%	Nov 1998	\$496.0B
<b>Nvidia</b> ★ Producer of circuits for motherboar...	B2B, B2C gaming semiconductors	machine learning deep learning artificial intelligence deep tech hardware	28%	1993	\$390.0B
<b>NetEase</b> NetEase offers online game service...	B2C gaming media	hardware advertising	15%	Jun 1997	\$52.1B
<b>Sea Group</b> The leading consumer internet co...	B2C gaming mobile app subscription	artificial intelligence mobile app subscription	2,856%	2009	\$30.7B
<b>Flutter Entertainment</b> ★ Peer-to-peer betting site	B2C gaming social gaming	commission	7,332%	2008	\$29.4B
<b>Kakao</b> Global mobile lifestyle platform	B2C gaming media mobile gaming	artificial intelligence mobile app commission marketplace & e-commerce	7,137%	2010	\$25.0B
<b>Evolution Gaming</b> ★ World leader in video-gamemed Liv...	B2B gaming mobile app gaming	commission	7,866%	2006	\$24.7B
<b>Riot Games</b> Creating top quality online games	B2C gaming mobile app gaming	virtual reality advertising	5,490%	2006	\$21.0B
<b>Roblox</b> ★ An online gaming and entertainme...	B2C gaming social	virtual reality deep tech mobile app 3d technology subscription	4,351%	2004	\$19.5B
<b>Take-Two Interactive Software</b> Developer, marketer and publish...	B2C gaming mobile app gaming	virtual reality commission manufacturing	79%	1993	\$18.4B

# Europe's most valuable gaming companies were founded after 2000.

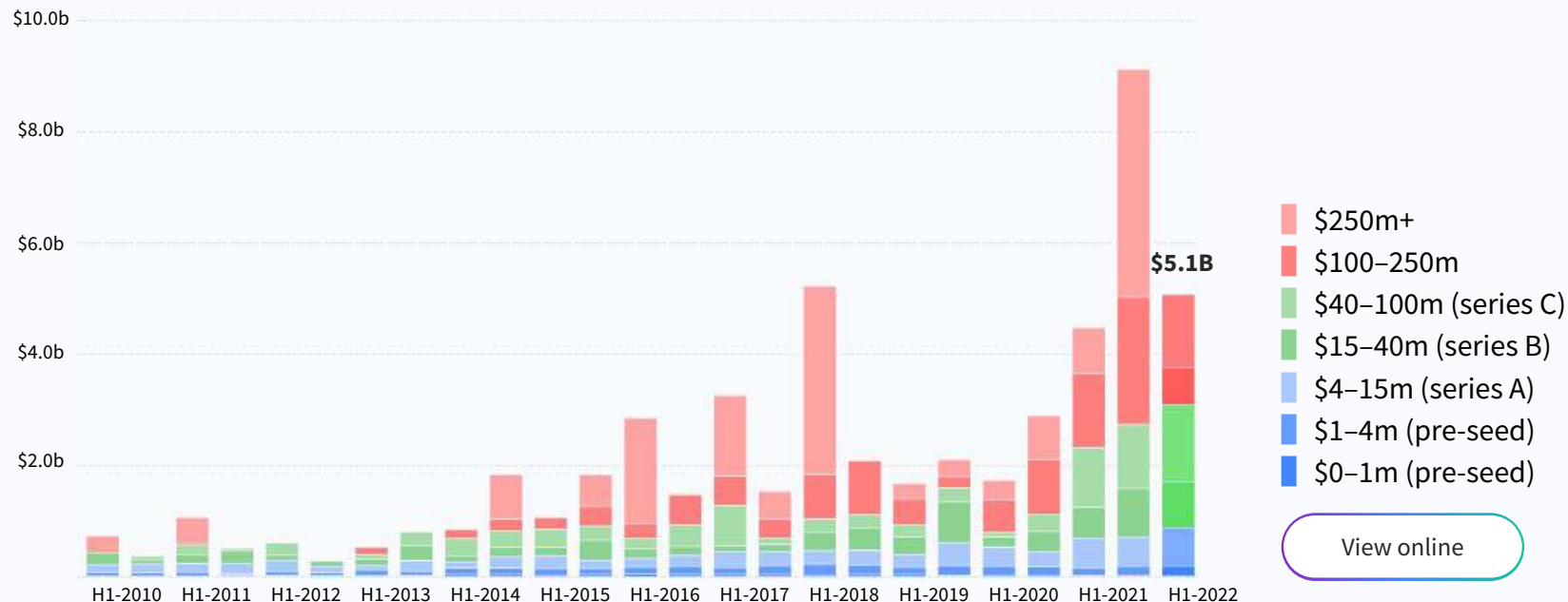
## Enterprise value by launch year » [view online](#)



## Most valuable companies in gaming

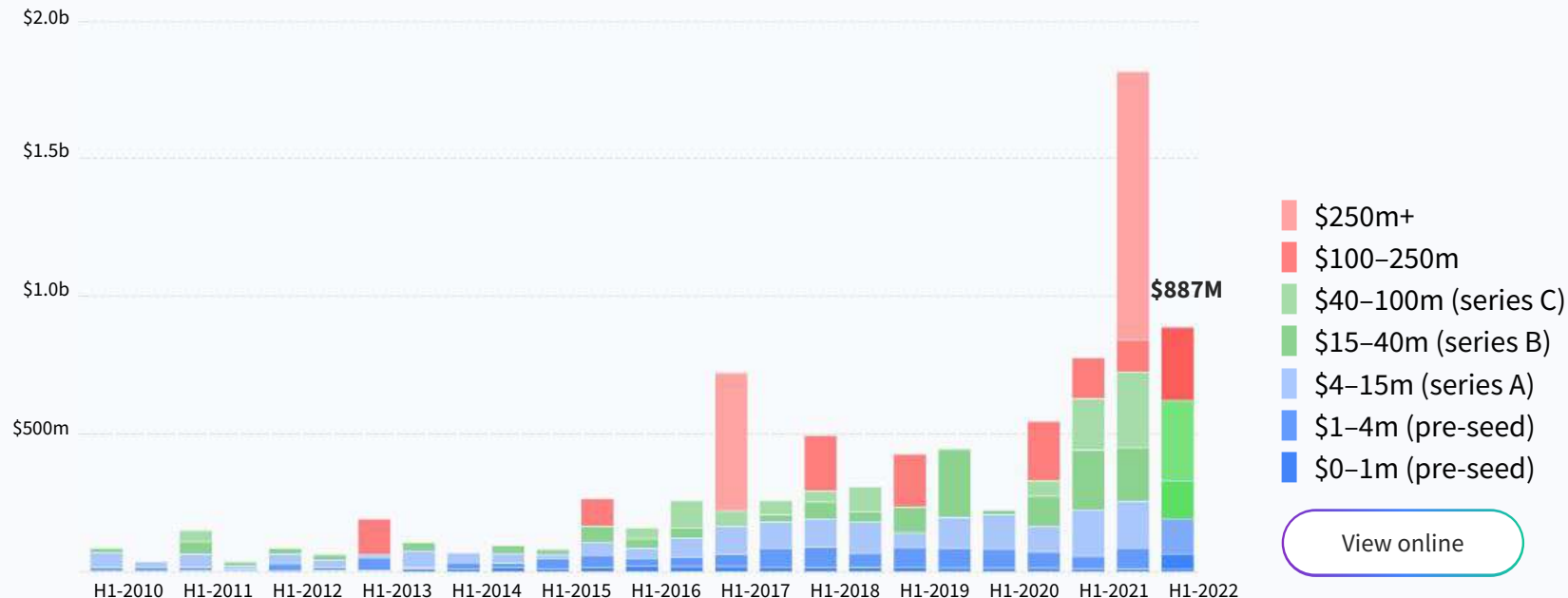
NAME	MARKET	TYPE	GROWTH 12 months growth	LAUNCH DATE	IP	VALUATION
<b>Flutter Entertainment</b> Peer-to-peer betting site	B2C gaming betting & gambling	commission	7,383	1948		\$29.4b
<b>Evolution Gaming</b> World leader in video-streamed Live...	B2B gaming casual & pro gaming	commission	2,368	2006		\$24.7b
<b>Entain (formerly GVC Holdings)</b> Global leading sports betting and g...	B2C gaming betting & gambling	subscription	731	2004		\$12.9b
<b>Supercell</b> Building a new kind of gaming exp...	B2C gaming mobile gaming		3,060	May 2010		\$10.2b
<b>Embracer</b> Parent company of businesses dev...	B2B gaming mobile gaming, casual & pro gaming	commission marketplace & e-commerce	48	1999		\$9.3b
<b>Playrix</b> Playrix is the largest gaming comp...	B2C gaming mobile gaming	advertising	3,404	2004		\$8.0b
<b>King.com</b> Interactive entertainment compan...	B2C gaming casual & pro gaming		2,705	Aug 2003		\$5.9b
<b>PokerStars</b> The world's largest poker site	B2C gaming betting & gambling	commission subscription	3,993	2001		\$4.9b
<b>Sky Betting &amp; Gaming</b> One of the leading operators in the...	B2C gaming sports betting & gambling sportsbooks	commission	3,429	2001		\$4.7b
<b>Sorare</b> A global fantasy football game whe...	B2C gaming sports	blockchain mobile app deep tech marketplace & e-commerce saas	145	Dec 2018		\$4.3b

# Global gaming investment reached \$5.1B in the first half of 2022, the biggest H1 on record.

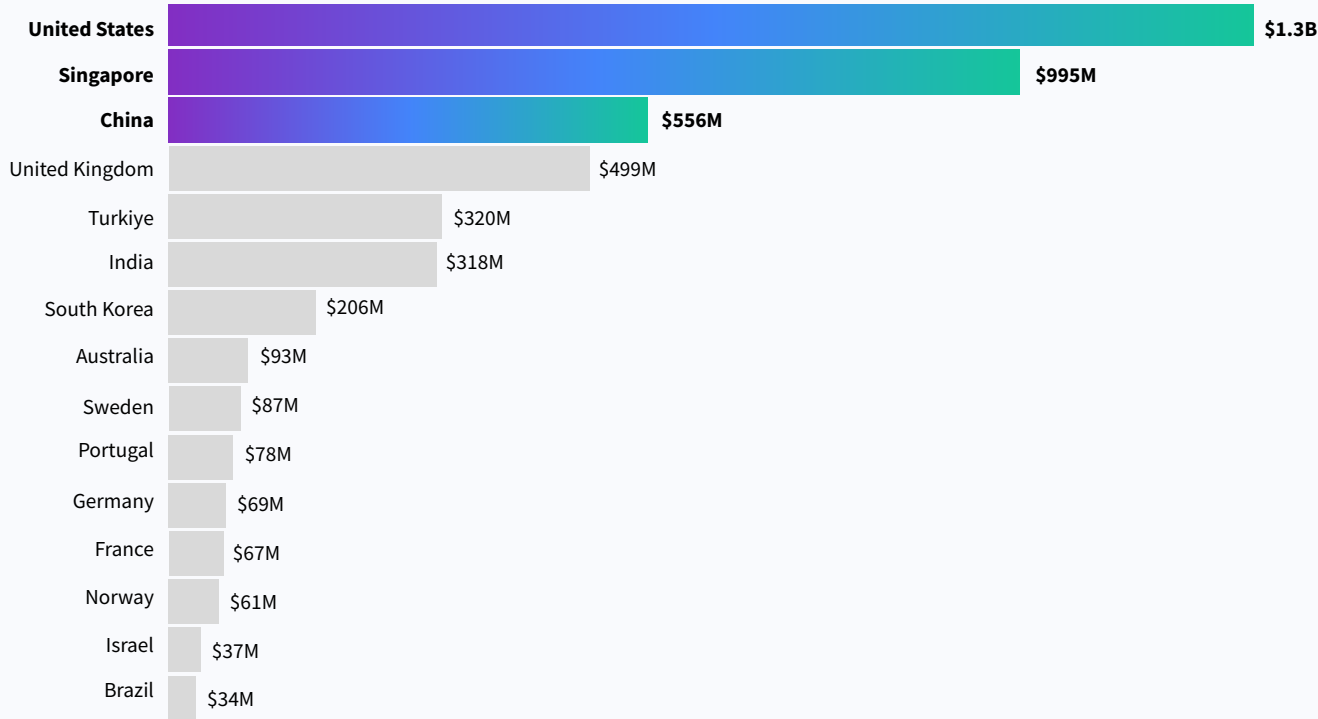


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# European gaming startups raised \$887M in the first half of 2022, up 14% on H1 2021.



# Gaming startups from US, Singapore and China have raised the most venture capital so far in 2022.



# Gaming startups who raised the most in **H1 2022**

[View online](#)

**CODA**  
PAYMENTS

animoca  
BRANDS

dream<sup>★</sup>

thatgamecompany



SKY MAVIS



IMPROBABLE

triple dot

 FanCraze

# Serious Gaming.

Serious Gaming allows users to experience situations that cannot be replicated in the real world due of cost, safety or ethical issues, but that positively impact skill development.

Engaging, gamified training can be scaled for thousands (or millions) of learners. And applications can cover anything from flight simulation and battlefield tactical training, to surgery and city planning.

Serious gaming

The image displays a grid of logos for various serious gaming companies, organized into several categories. Each category includes a title and a total funding amount. The categories and their respective logos are:

- Children's Learning** (Combined funding \$ 100M): TinyTap, KUATO, krüpe, Tab, Tele, TABU, Yingle, 12Trix, LITTLE SMART PLANET, Akriban, Letticeschool, CodeSpark, Beanna Apps, BoniO, Mind Labs, Learning Touch, Hyper Games, matific, SchussCountry, Kinder-Spielern, Spoons, High-Zookeeper, Naya Disha Sbat, Ubiody, KincoWorld, Playto, Mongohigh, ICAND, LilyMedia, Joygames, SmartKids.
- Education** (Combined funding \$ 380M): seppo, ImpactGames, Realwith, Andania Learning, To-Be Education, Prology Games, App2Improve, LUD EN. IO, MyGeo, ZORDIX, HistoQuest, luqo, Wibu, NEXTBOOK, Ginger Tiger, MEMORUSH, Ubsstein, Xiler-Straße, MPS Interactive, CompuLab, Serious Games 1, Kartocri, Happyplaytime, WOLKcraft Inc, Harpview, Rongella, Augmented Reality, Economics Games.
- Esports** (Combined funding \$ 90M): Rard1, Statespace.
- Language** (Combined funding \$ 0.3M): English Adventure, Drops, WordPlay, Life GamesBox.
- Healthcare** (Combined funding \$ 239M): Immersive Rehab, TorqueR, Abili, Papyrus, Cognitive, Intendu, SPOTLAB, Veeva, AXINE2iS, Airmill, VizZion.
- Coding** (Combined funding \$ 2.3M):
- Skill Developing** (Combined funding \$ 33M): P=AK, O, N.

**Geospatial/3D Data**  
Combined funding \$ 768M

Upland, Matterport, Cesium, AERTH, Descartes Labs, NEXTNAV, Occipital

**Hardware**  
Combined funding \$ 412M

Nvidia, Razer, Oculus, MATSUO, Vuzix, Lightform, Kokoko, UltraLeap

**Autonomous AI**  
Combined funding \$ 1.9B

Soul Machines, OpenAI

**Modding**  
Combined funding \$ 28M

Mod.io

**AR/VR**  
Combined funding \$ 3.4B

Renovl, Vuforia, TARVALLEY, CLOUPLAY, Magic Leap, Spatial.io, AltopocoVR, Virtway, Camerjibe

**Events**  
Combined funding \$ 54M

**Social Media**  
Combined funding \$ 10.1B

Discord, ByteDance, Meta (formerly Facebook), Clubhouse, THE T.A.T.V., THETA.tv, Snapchat, Zoom Video Comm, Powder, Youtube, Snap Inc., Twitter

**Avatar Creation and digital identity**  
Combined funding \$ 51M

DigiNation, Crucible, Vault Hill Labs, Wolf3D, Ready Player Me, Evernym, GuildFi, Kineticx, Islands, Somnium Space

**Education and coworking**  
Combined funding \$ 19M

# The Metaverse.

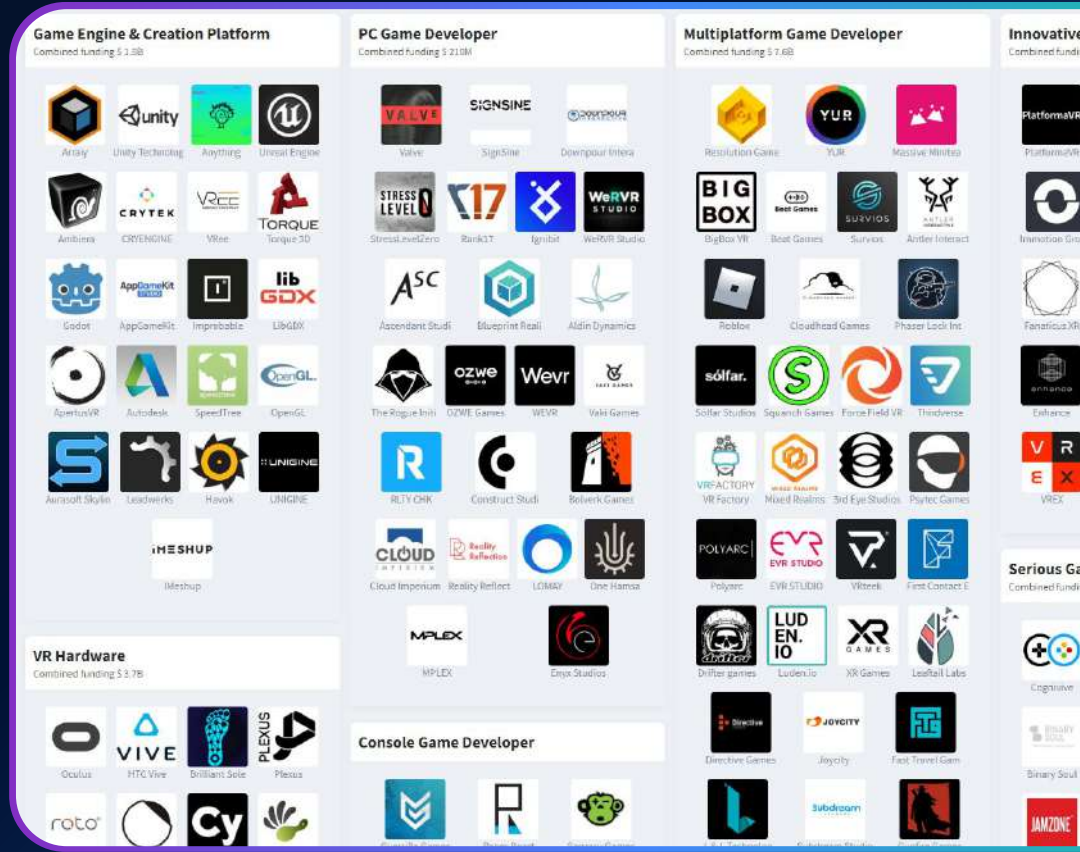
The Metaverse is a collection of interconnected, highly immersive, shared virtual worlds where people gather to play games, socialise and work.

Metaverse

# VR Gaming.

Virtual reality has been one of the most innovative technologies in gaming history, putting the player literally inside the game. These are the biggest players:

VR gaming











# Discover the most promising **Gaming** startups using predictive signals.

(Pre)seed opportunities

Series A+ opportunities

Breakout opportunities

DEAL ROOM SIGNAL	NAME	MARKET	TYPE
86	 <b>Two</b> ★ Tillit combines invoice financing w...	B2B fintech mortgages & lending payments	commission subscription saas
82	 <b>Reef</b> ★ Smart liquidity aggregator and yiel...	B2B fintech wealth management	blockchain commission saas
82	 <b>2Up</b> Building mobile games that harnes...	B2B gaming mobile gaming	commission manufacturing
81	 <b>Cassbana</b> Cassbana is a technology solution ...	B2B fintech mortgages & lending regtech	machine learning artificial intelligence subscription saas
80	 <b>Saleor Commerce</b> ★ A headless, GraphQL-first, open-so...	B2C fashion	saas marketplace & ecommerce
79	 <b>Asynchronous Art</b> Platform built on the Ethereum blo...	B2B, B2C fintech media crypto and defi	blockchain subscription marketplace & ecommerce saas
79	 <b>Maple Finance</b> ★ Institutional capital marketplace p...	B2B fintech mortgages & lending crypto and defi	blockchain marketplace & ecommerce
78	 <b>CoinSmart</b> ★	B2B fintech crypto and defi wealth management	blockchain deep tech subscription

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