

2022

Key Data of Games Industry in Taiwan

Key Trends in Taiwan's Games Industry in 2022

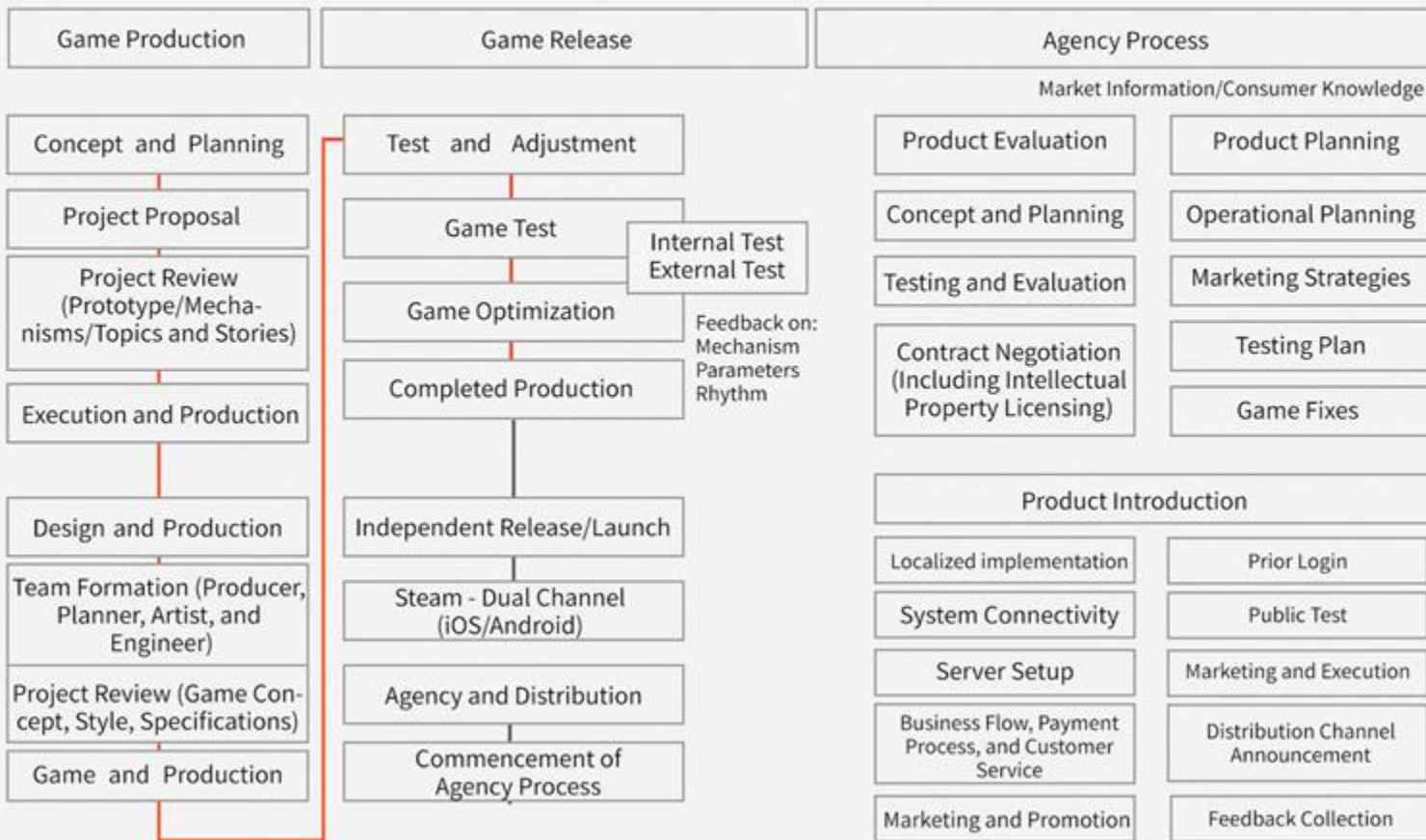
- In 2022, the total revenue of the games industry in Taiwan was approximately **NT\$64.16 billion**. Despite the global games industry's decline due to post-pandemic dividend cuts and the overall economic downturn, Taiwan maintained a modest growth rate of **1.6%**.
 - We gathered this data from public financial reports and survey responses from a total of 200 companies. Among them, 25 listed companies had a combined revenue of NT\$46.294 billion, while 175 unlisted companies had a total revenue of NT\$17.863 billion. The main revenue contribution from unlisted companies came from those with more than 16 employees, especially those with 16–50 employees (NT\$7.289 billion) and 51–100 employees (NT\$4.594 billion). There were 66 companies with fewer than 15 employees, generating NT\$618 million in revenue.
 - **The overall increase in industry revenue was primarily driven by listed companies**, with a total of NT\$46.294 billion, up 9.5% compared to 2021.
 - However, **the total revenue of unlisted companies showed a decline**, amounting to NT\$17.863 billion, down 14.4%.

- Taiwanese games' companies are geographically concentrated in the northern region, with more than half having fewer than 50 employees. They tend to diversify their business scope, covering not only game development and game agency, but also digital platform management.

- In terms of game development, role-playing games still constitute the majority in terms of quantity. However, simulation games in development also account for more than 20% of the total, indicating optimistic market prospects for this genre.
- Nearly 50% of games' companies reported having implemented the use of artificial intelligence (AI), with 71% of art designers and 67% of script planners using AI for collaboration.

*We statistically derived other data from 133 out of 200 targeted companies that responded to the survey, in addition to revenue data from public financial reports.

Industry Map of Taiwan's Games Industry



Slight Growth in Taiwan's Games Industry Revenue in 2022

Estimated total revenue for 2022:

NT\$64.16 billion

Estimated total expenditure for 2022:

NT\$49.91 billion

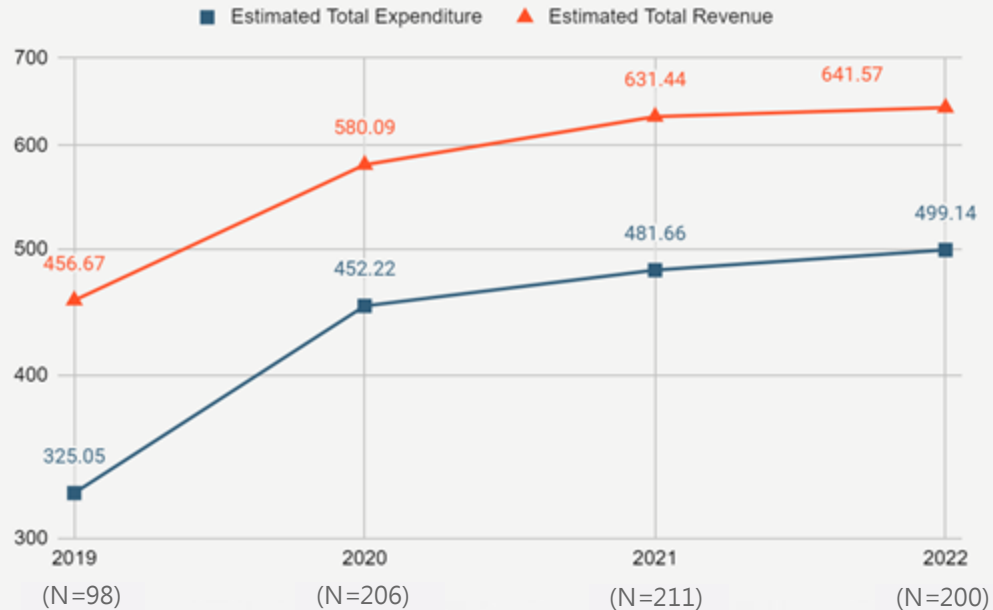
Estimate based on 200 companies
(25 listed companies + 175 unlisted companies)

Note: The figures provided in this report are rounded. If individual data points are directly summed, there may be slight discrepancies from the original statistical data, but these do not affect the overall trend interpretation.

Source: This survey questionnaire and public financial reports of listed companies.

- Estimated total revenue in 2022 increased by 1.6% compared to 2021.
- Estimated total expenditure in 2022 increased by 3.6% compared to 2021.

Unit: NT\$100 million



Listed Companies as the Main Driver of Growth in the Games Industry in 2022

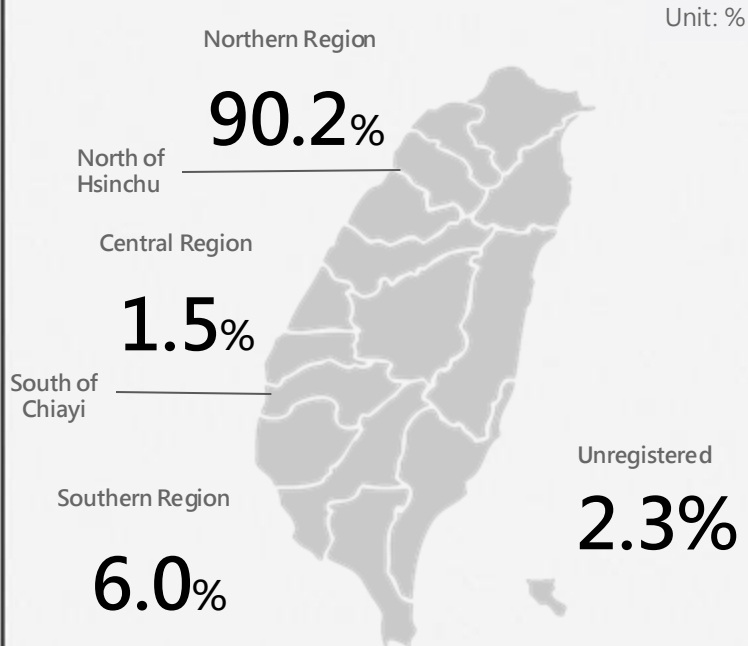
	2021		2022
Listed Companies:	NT\$ 42.272 billion	+ 9.5%	NT\$ 46.294 billion
Unlisted Companies:	NT\$ 20.872 billion	-14.4%	NT\$ 17.863 billion

- In 2022, over 70% of the total revenue and expenditure of Taiwan's games industry came from listed companies. The total revenue of listed companies was NT\$42.272 billion in 2021 and NT\$46.294 billion in 2022, representing a growth of 9.5%. In contrast, the revenue of unlisted companies was NT\$17.863 billion in 2022, down 14.4% from NT\$20.872 billion in 2021.



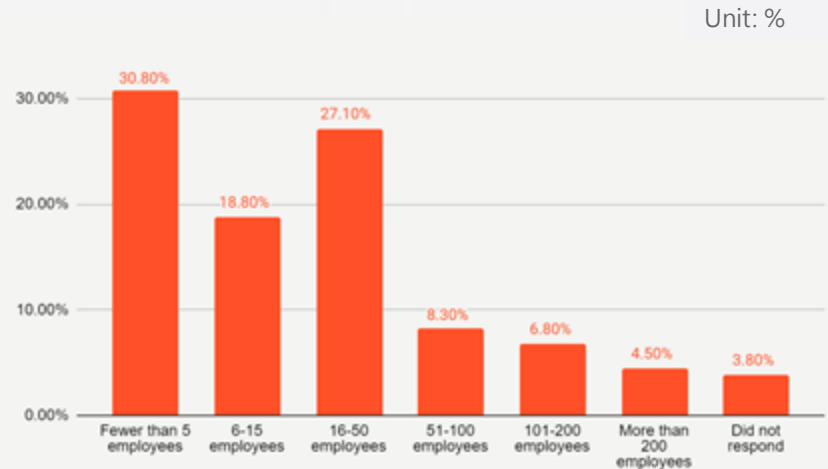
Taiwan's Games Industry Primarily Consists of Small and Medium-Sized Enterprises, Concentrated in the Northern Region

Regional Distribution of Taiwan's Games' Companies



Employee Scale of Taiwan's Gaming Companies

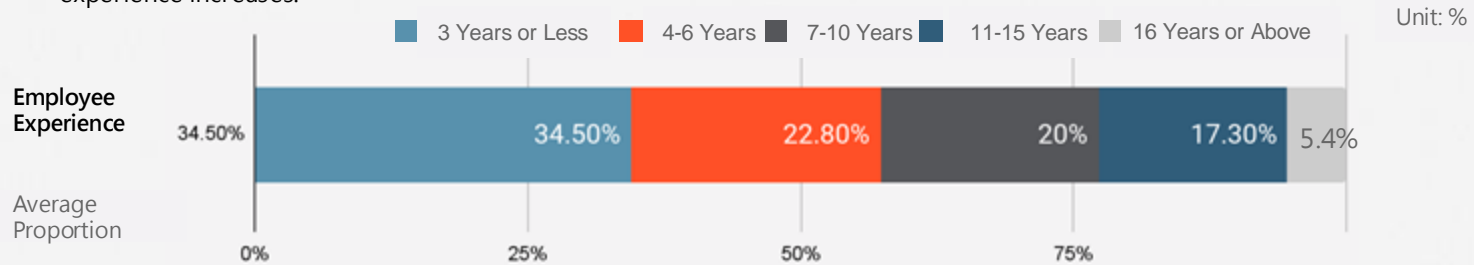
Out of the 200 companies surveyed, responses were received from 133 companies, with a total of 9,929 employees. More than 75% of the companies have fewer than 50 employees.



New Employees Account for a Large Part of the Workforce; Recruitment Needs Expected in the Coming Year

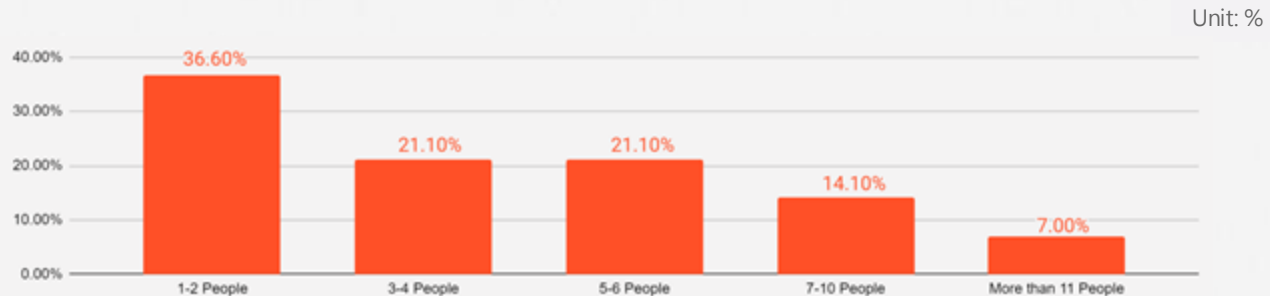
- **High Proportion of Newcomers in the Workforce, with Over 30% Having Less Than 3 Years of Experience:**

The highest average proportion is for those with 3 years or less of experience (34.5%), with the proportion decreasing as experience increases.



- **Limited Recruitment Needs in the Coming Year; Mainly Recruiting 1-2 People:**

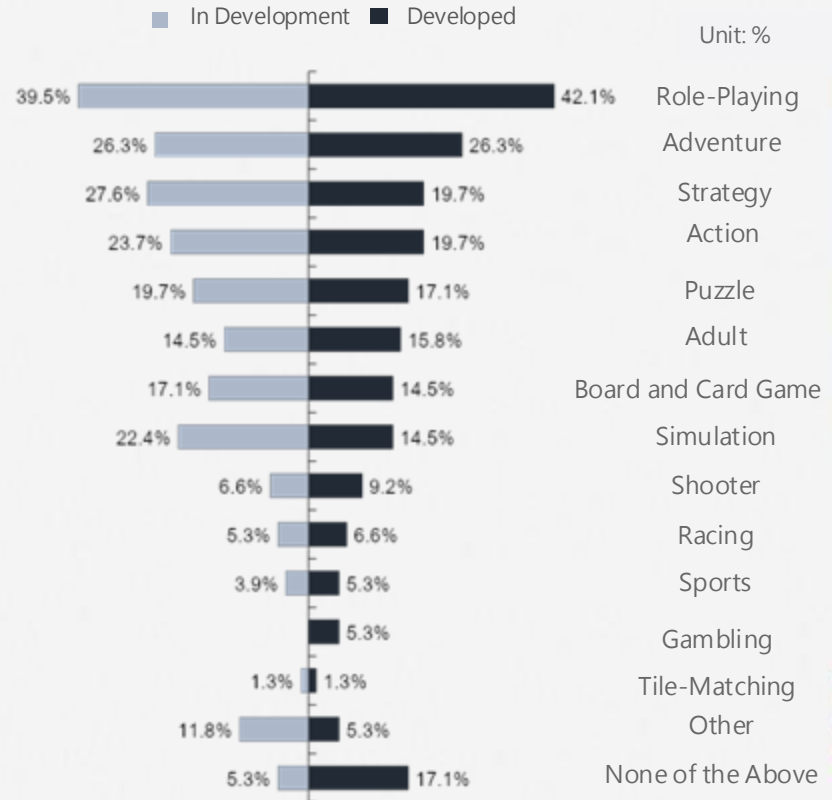
About half of the companies have recruitment needs in the coming year, with the highest demand being for 1-2 people (36.6%).



Source: This survey.

In Terms of Game Development, RPGs are the Most Popular Genre

- The top three types of games currently in development or completed by game companies are role-playing, adventure, and strategy simulation games.
- Simulation games, making up 22.4% of the games in development, indicate that companies are optimistic about the future market potential for this type of game.

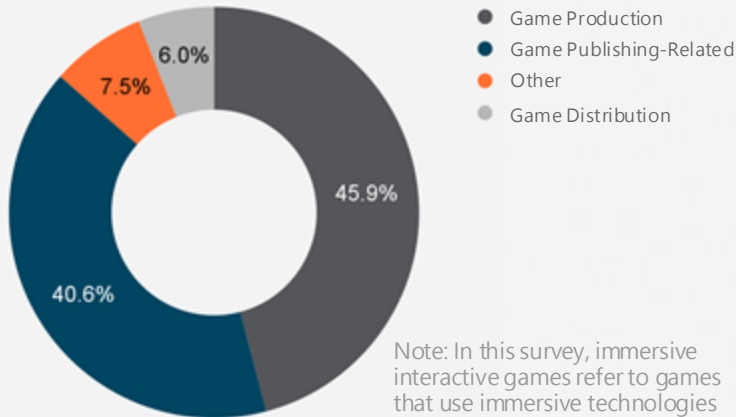


Source: This survey.

Game Companies Focus Mainly on Production and Publishing, with a Balanced Proportion of PC and Mobile Game Development

- Among the surveyed game companies, the main business activities are game production (45.9%) and game publishing-related activities (40.6%).
- In game production, the proportions of PC (19.5%) and mobile (18.8%) game development are relatively high. In game publishing-related activities, game operation/agency (21.8%) is more common.
- There are fewer companies that primarily engage in the production of immersive interactive games*.

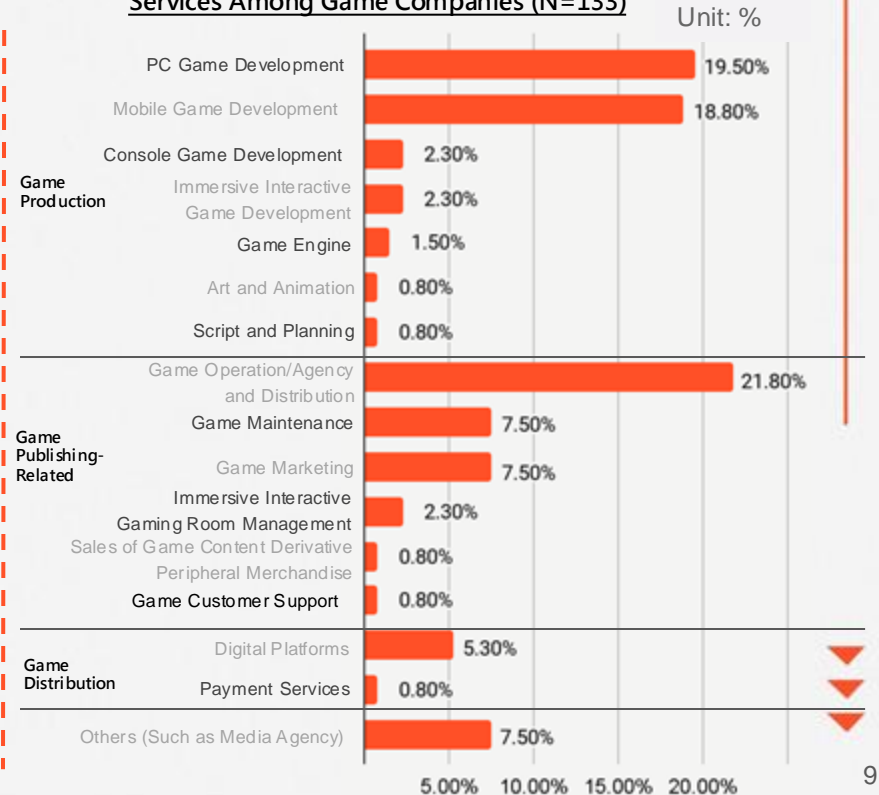
Primary Businesses of Taiwan's Game Companies



Note: In this survey, immersive interactive games refer to games that use immersive technologies such as augmented reality (AR) and virtual reality (VR).

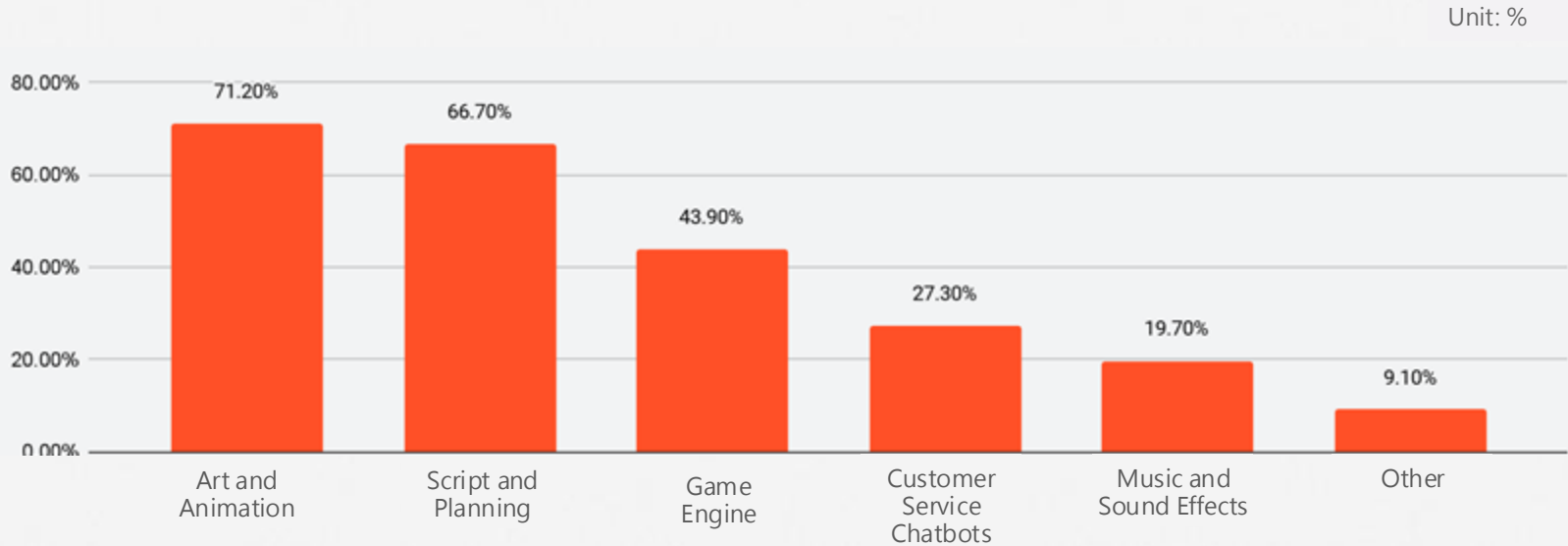
Source: This survey.

Breakdown of Business Activities and Services Among Game Companies (N=133)



Nearly Half of Game Companies Use AI Technology, Primarily in Art and Animation

- 49.6% of the surveyed companies reported the utilization of AI technology. The main applications are in art and animation (71.2%), script planning (66.7%), and programming engines (43.9%).



Source: This survey.