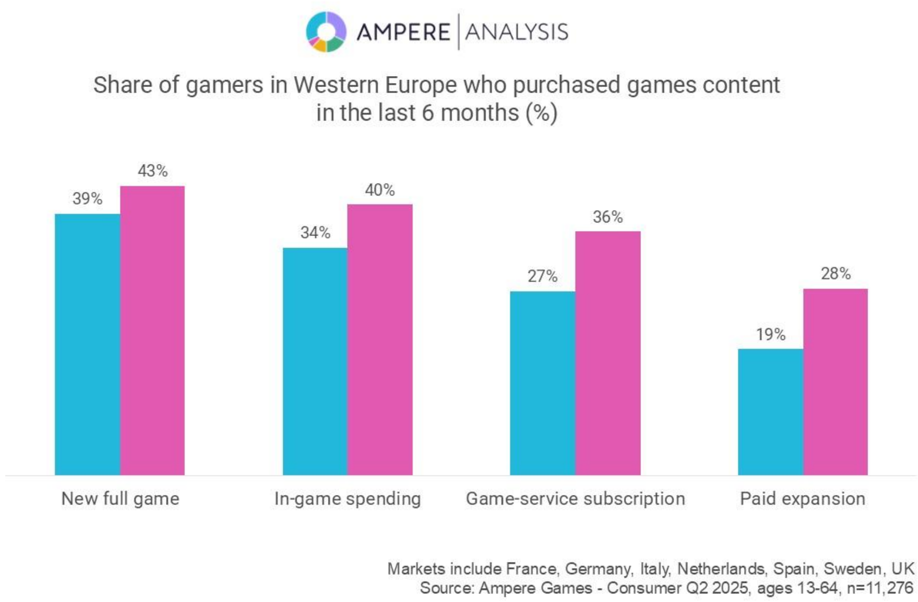
Western Europe: More gamers paying, but average spend is down

In-game spending, subscriptions and casual plays push the market in 2025 as gamers seek value

London, 14th August 2025: As the industry prepares for Gamescom, the biggest games conference of the year, new consumer insight from the Games Team at Ampere Analysis reveals that in 2025, more of Western Europe's gamers are spending money on new games, in-game resources, and subscriptions compared to a year ago. However, the average spend per gamer has declined.



Key findings: How Western Europe's gamers are spending in 2025

- In 2025, **43% of gamers in Western Europe aged 13 to 64** said they had purchased new games in the past six months, up from 39% in 2024.
- The share of gamers who spent money in-game has also **increased from 34% in 2024 to 40%** in 2025.
- More gamers are now also subscribing to games services, with the share growing to over one-third (36%).
- The most significant increase in the share of gamer spending is in the **players aged 16 to 34**, and is relatively equal across genders.

- Ampere believes this **growth is originating from the more casual, light-touch gamers**, because simultaneously, average spend per gamer has fallen by around 17%.
- Gamer numbers still lag the peak hit during the pandemic in 2021.

What gamers want: Battle passes, strong storylines and open worlds
Among Western European gamers who made in-game purchases in 2025, the most popular buys were in-game resources or currency (43%), and battle or season passes (42%), while just a quarter (25%) spent on cosmetic items. The appetite for cosmetics peaks among 25 to 34 year olds, with almost one third (32%) buying them recently.

Whilst VIP or single-game subscriptions were purchased by around a quarter of gamers in the past six months, gamers in the UK are the most likely to buy them, with 11% saying they would do so to remove in-game ads.

When it comes to choosing what to play, genre loyalty dominates. Over one third (38%) of gamers in Western Europe say they buy or download a game because it is a favoured genre. The second most popular rationale is if friends are playing the same title. However, for older gamers aged 45 to 64, enjoying a demo or trial is more important than the influence of friends.

While a well-developed storyline tops the list of the most essential gameplay features, many gamers in Western Europe value autonomy and an open world design. Around a third say their most valued gameplay feature is being able to decide their route and direction whilst exploring a world.

Louise Wooldridge, Senior Research Manager, Games at Ampere Analysis, says: "We are seeing a shift in the way people engage with games in Western Europe. More players are spending, but in smaller amounts – the intense competition of the attention economy, plus ongoing macroeconomic turbulence, means players are seeking value, as evidenced by the success of many mid-priced, premium games this year. Companies can respond by targeting under-performing gamer groups – such as females and older players - with more tailored strategies to engage and monetise."

Ampere Analyst Speak: Why is this happening, and what are the industry implications?

Whilst games companies are improving conversion rates, average spend is down. Widespread economic and political turbulence in recent years has led to consumers being more cautious, and they are seeking out value in their media consumption. The ever-expanding attention economy also means that gamer time and money are being pulled in multiple directions – from video, to music, to social media. What's more, we have also seen much success among mid-priced premium games this year, despite the noise around $80+ AAA content.

Although the expansion of the paying audience is positive in such a hyper-competitive market, the benefits of adding these converted players are, on average, diminishing. However, several underserved groups of gamers could be engaged with more targeted strategies. There are millions of female and older players in Western markets, for example, who could be better monetised. Communicating through the relevant channels and offering a more tailored onboarding process all support deeper engagement of these broadly neglected audiences.

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Notes to Editors

The data in this press release is from Ampere Games – Consumer. The survey covered France, Germany, Italy, the Netherlands, Spain, Sweden and the UK. There were 11,276 respondents.

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About Ampere Analysis

Founded in January 2015, Ampere Analysis is a new breed of media analyst firm. The company's experienced team of sector-leading industry analysts specialises in sport, games, pay and multiscreen TV and next-generation content distribution. Our founders have more than 60 years combined experience of providing data, forecasts and consulting to games publishers, the major film studios, telecoms and pay TV operators, technology companies, TV channel groups and investment banks. www.ampereanalysis.com