

metaplay

THE GAME DEVELOPMENT

RETAIERSPACE

The games industry is bouncing back.
ARE YOU READY?

Promo inside



With thanks to:

Each of the 20+ industry experts we've interviewed. You gave us a great story to tell; we hope this paper does it justice.

Atomik Research, for their help in surveying 150 leading Unity live service game developers.

Raptor PR, for their continued support and consultation.

Demi Joryn. You made this happen.

'renaissance' (n)

a revival of an art form after a dark age.

THE
RENAISSANCE
IS
REAL



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Teemu Haila On Canvas
Jodie Mynar, 2024
700 x 900 px



Foreword by Metaplay CPO

TEEMU HAILA

FOREWORD

The Renaissance is one of the most significant periods in human history. Spanning the 14th to the 17th centuries, it is surpassed in importance perhaps only by the Golden Age of Hypercasual. It rightly evokes images of paintings and sculptures such as the *Mona Lisa* and *The Statue of David*, but the Renaissance was not just an artistic and cultural awakening. It was an abandonment of the fixed ideas of the Middle Ages and a move towards modernity, resulting in major leaps forward in the fields of not only art but also science, mathematics, technology, and medicine.

The nautical compass and the parachute. Advancements in milling, smelting, forging, and manufacturing. The square root and equal signs. ‘Infinitesimal calculus’, which, fittingly, is the mathematical study of continuous change (but you didn’t need us to tell you that) - this very field forms the backbone of much of the maths and data science used to develop successful games today. All of these emerged during the Renaissance.

Perhaps the single most important invention of the period was Johannes Gutenberg’s printing press. The printing press was the catalyst and conduit for greater literacy, scientific and mathematical knowledge, and economic development. But today, it represents much more than that: it was one of history’s most striking examples of a piece of technology that automated a workstream previously and laboriously undertaken by hand.

This context is critical because we see stark parallels that give us reason to believe that game development, despite its relatively short history, is now entering its very own period of renaissance. The results of a landmark study we’ve conducted with industry leaders from across the world suggests this upcoming era will eventually enable us to view the challenges of Apple’s IDFA changes and the post-pandemic slump as nostalgic annoyances rather than never-ending critical threats to our industry.

We interviewed 150 senior Unity developers in the UK and US, and sat down with dozens more senior leaders in games from across the globe, and across the board, they shared the same view: the industry is ready to bounce back. After several years of uncertainty, where the ground beneath developers seemed to shift every quarter, something revolutionary is happening.



FOREWORD

Gone are the days of unfathomably cheap CPIs and golden cohorts that made it easy to print profits through wild west-style user acquisition. Those days aren't coming back, and it's time to stop waiting for them. Instead, the future of game development is built on something much more sustainable - creativity, productivity efficiency, and next-generation technology. These aren't just industry buzzwords. They are the foundational principles of what it means to thrive in this new era.

Our findings have shown that LiveOps, cross-platform development, and external technology are at the heart of the Game Development Renaissance. LiveOps has evolved from a 'nice-to-have' to a core game feature, while cross-platform development, once a costly grind of manual porting, is now easier than ever thanks to modern engines and multi-platform tooling. Meanwhile, external technology is driving a seismic shift in development efficiency. Just as the Renaissance absorbed Greek, Islamic, and Chinese knowledge, today's developers are tapping into a global ecosystem of third-party SDKs, backends, and automation platforms, freeing teams to focus on creativity and player experience instead of reinventing infrastructure.

This is why the Game Development Renaissance is so much more than a catchy headline. It's a movement, a shift in the way game development is done. It represents an era where studios no longer have to rely on raw headcount to achieve growth. Instead, growth is achieved through smarter tooling, leaner teams, and sharper strategy. In the pages that follow, we'll give you a front-row seat to this transformation. We hope you enjoy reading it as much as we've enjoyed putting it together.

Team Hirtle



A vibrant, painterly illustration of a group of people in medieval-style clothing celebrating joyfully. The scene is filled with energy as confetti falls from the top. In the center, a man with glasses and a blue tunic with a brown sash has his arms raised in a shout. To his left, another man with glasses and a brown tunic smiles broadly. To the right, a woman with red hair and a red tunic is laughing, holding a glass. In the foreground, a woman with blonde hair and a green tunic is also laughing and holding a glass. The background shows other people in similar attire, all appearing to be part of a festive gathering. The overall atmosphere is one of pure joy and celebration.

New Beginnings



Chapter I

THE GAME DEVELOPMENT



RENAISSANCE

77%

OF DEVELOPERS ARE ANTICIPATING THAT THE GAMES INDUSTRY WILL GROW.

* The Game Development Renaissance

Our research shows that over 75% of game developers are optimistic about future industry growth. Indeed, the hard data supports this - the global market for games is expected to reach almost \$190bn in 2025, up from €170bn in 2024, \$155bn in 2023 and \$140bn in 2022 (Statista).

These numbers show that even though the industry has suffered over the past few years following some seminal shifts in the user acquisition landscape, the global market for games has in fact continued to grow. In isolation, revenue data for the games industry would probably be enviable for most other sectors. So why has our industry been feeling so much pain?

One of the reasons could be that we were guilty of over-estimating the extent of our growth potential when we were living through the halcyon days of a couple of years past. Though the years that followed were still strong, perhaps we front-loaded a bit too hard and had to scale back down a touch. The result, then, was a correction - an over-compensation of that mis-estimation - rather than a full-blown crisis. And based on our findings, it looks as though we're ready to emerge from the other side of this now, optimistic for a return to some semblance of normality.

At Metaplay, we see this optimism as an opportunity to rethink what's possible. By taking the learnings from recent history and applying them to what's in front of us, we can embrace smarter ways of working to build longer-lasting games, and more successful businesses.



“

I've been in the industry for 20 years, and this has been one of the biggest periods of turbulence. But with that turbulence undoubtedly comes fresh opportunity. There's space for newcomers as old models crumble, opening avenues for innovation and exciting new ways to run games businesses.”



ELINA
Arponen

CEO, Quicksave

68%

OF DEVELOPERS EXPECT A HIGHER NUMBER OF BETTER QUALITY NEW GAMES.

The number of new games is rising, but it's the surge in quality that developers believe will truly stand out. Over two-thirds of those we surveyed anticipate better games ahead, reflecting evolving player expectations and studios' readiness to meet them. This marks a shift from 'launch and leave' development to a 'ship, refine, and grow' approach, now essential in a market where player engagement defines success.

Fueling this evolution are advancements in development technology. AI-driven design tools enable smaller teams to achieve more, supporting rapid prototyping, scalable content creation, and automated QA workflows. Incrementally-adoptable development frameworks let studios deploy, test, and refine games earlier, shortening time-to-market without sacrificing creativity or quality. As these tools become standard, innovation is thriving. New subgenres are emerging, such as RPG-infused social casino games or 'Hexacore' design, which weaves six gameplay layers into one cohesive experience.

Hits like *Vampire Survivors*, *Honkai: Star Rail*, and *Marvel Snap* prove that originality and depth are more vital than ever. Players now expect layered progression, richer meta-systems, and LiveOps content that keeps them engaged for months - or even years - after launch. For Metaplay, this shift underscores the need for operational agility. Studios with robust backend tools hold a decisive edge, as the next wave of hit games will be defined by growth beyond launch day. It's a shift in both mentality and execution, where ongoing adaptability is key to long-term success.



* The Game Development Renaissance

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New genres are definitely coming, and that's great because it's a blue ocean opportunity. It's not just copying existing templates—there's a push for more disruptive iteration. We're already seeing it with social casino RPGs and Hexacore-based games.”



JAKUB
Remiar

Mobile gaming
industry
consultant

77%

ARE ANTICIPATING GREATER AVAILABILITY OF FUNDING FOR NEW STUDIOS.

* The Game Development Renaissance

With nearly four in five expecting increased funding for new studios, developers are expecting the financing landscape for game development to enter a new era. Unlike past boons driven only by venture capital, today's shift is supported by a diverse range of sources, and as a result, will hopefully be more sustainable. Crowdfunding, angel syndicates, and community-backed investments are opening up more diverse access to capital. These models allow for more creative control, flexibility, and early community support, and could be vital levers for developers going forward.

The data reflects this change. In Q3 2024, global gaming VC funding hit \$517 million, with \$262 million going to growth-stage funding - well above 2023's quarterly average of \$159 million. Confidence in established studios is rising, but early-stage funding from VCs has dropped to its lowest since Q1 2020. While this might seem like a setback for startups, it's creating space for alternative sources of startup capital to thrive. Crowdfunding platforms like Kickstarter are resurging, while angel syndicates pool resources to support smaller studios.

Macroeconomic trends are also driving this shift. Falling global interest rates push investors toward riskier, growth-oriented markets like gaming. High rates previously made bonds and fixed-income assets more attractive, but as rates fall, venture and equity funding regain momentum. Combined, this gives VCs and their limited partners (LPs) the confidence they need to restart investment activities into a broader pool of game studios.

That's crucial, because despite the emergence of alternative funding sources, VCs will always be the most relevant tool in the funding toolbox. New funds from established venture capital firms Bitkraft Ventures and Play Ventures remind us of this, and are another good indication that the industry is on the cusp of a fresh surge in growth.

At the same time, recent years have proved the importance of developers needing to have access to alternative sources of capital. That way, if venture capital in gaming ever enters another dry patch, we'll be ready for it.



“

I've seen models of smaller studios going the crowdfunding route or working with business angels instead of just traditional VC firms. Now you have more syndicates forming in games, and different funding models are emerging that make it more sustainable.”



SOPHIE
Uo

Founder,
Rise and Play

73%

OF GAME DEVELOPERS ARE ANTICIPATING MORE ACQUISITIONS AND EXITS.

With around three-quarters of developers anticipating more acquisitions and exits, industry consolidation remains a defining trend. Larger companies aim to expand content portfolios, access new markets, and strengthen their position in talent, IP, and product, while for smaller studios, this shift presents both opportunity and strategy - whether to build toward an exit, or leverage buyer interest to fuel growth.

High-profile deals like Microsoft's \$68.7 billion acquisition of Activision Blizzard and Sony's \$3.6 billion purchase of Bungie were headline-grabbing, while Savvy Games Group's acquisition of Scopely and EQT's multi-billion-dollar buyout of Keywords Studios showed that although M&A activity slowed, it's still a vital part of the game industry landscape.

Meanwhile, mid-tier acquisitions are bouncing back. MTG's purchase of Plarium, valued in the hundreds of millions, shows that smaller studios can be prime targets. For independent studios, this creates a clear strategic decision: remain independent or build toward acquisition. With a growing pool of potential buyers emerging, studios have more leverage to drive better deals.

As we've discussed overleaf, macroeconomic factors also play a role. Falling global interest rates and stronger equity markets give large studios more liquidity to pursue growth bets, enabling them to seek out emerging talent and tech. For smaller studios, this could shorten the runway to acquisition, especially for those leveraging cutting-edge tools to develop proprietary tech or original creative concepts that

capture market attention and encourage interest not only from players, but also from investors and the market as a whole.

Looking to the future, re-emerging consolidation patterns suggest fertile ground once again for smaller studios seeking exits or strategic partnerships. With fresh funds in play and an active buyer's market, studios will have a rare chance to turn their creative vision into a lucrative outcome, shaping the next era of game development.



* The Game Development Renaissance

“

We're seeing signs of renewed investor interest in mobile studios. There's definitely more activity now compared to the past couple of years, with new funds being raised and some notable acquisitions like SuperPlay and Plarium still fresh in people's minds.”



JERE
Partanen

Principal,
Sisu Ventures

71%

OF GAME DEVELOPERS ARE ANTICIPATING FEWER LAYOFFS AND GAME STUDIO CLOSURES.

* The Game Development Renaissance

The cycle of rapid hiring followed by mass layoffs has plagued game development in recent years, but developers are hopeful for change. More than two-thirds of developers now anticipate fewer layoffs and closures as studios shift toward sustainable growth strategies. The old ‘hire big, fire fast’ approach has proven inefficient, harming studio morale, creative output, and industry stability. Now, a more balanced approach is on the horizon.

The live service boom is a key driver of this change. Instead of inflating teams during development sprints and downsizing post-launch, studios are moving toward leaner, more focused teams that remain throughout a live service project’s lifecycle. Advances in productivity-enhancing tools and tech are making this possible, allowing studios to scale production without swelling headcount unnecessarily.

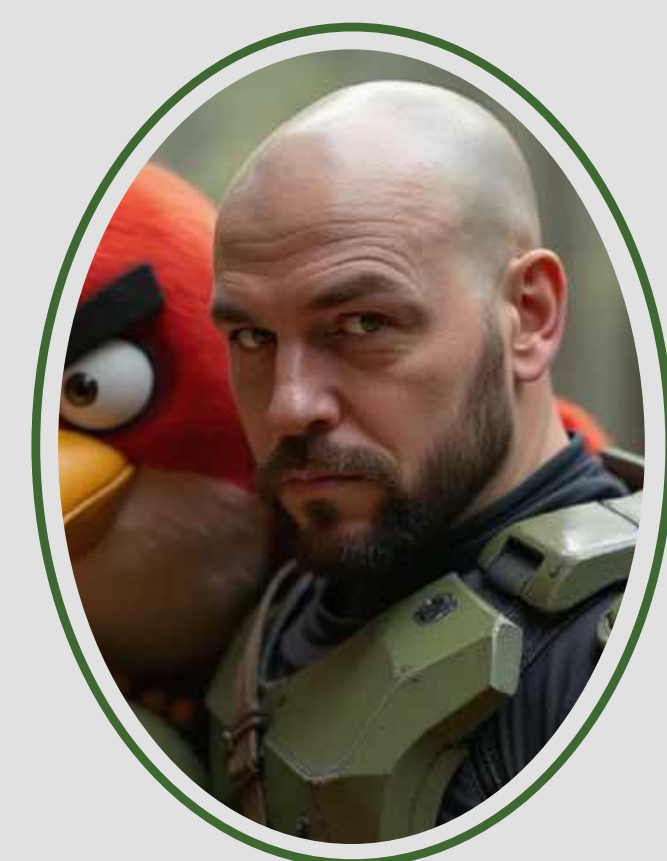
Cross-platform releases are also reshaping hiring strategies. By launching on mobile first, studios can later expand to other platforms, maximizing player reach without rebuilding from scratch. This staggered approach supports smaller, more agile teams focused on long-term LiveOps content rather than short-term launch milestones.

In the Renaissance, studios that prioritize sustainable hiring will gain a long-term competitive edge. This shift represents a maturing industry, where game developers can expect more stable careers. It’s a future where creative ambition thrives, supported by consistent employment practices that are fair for both developers and studios alike.



“

The past couple of years have been bumpy, but the games industry is actually quite healthy. We’re seeing some correction moves from shareholders, but the industry is still profitable and growing year over year. I anticipate growth in profit next year as well.”



ALEXEI
Ryan

Global Talent
Acquisition
Leader

76%

OF GAME DEVELOPERS EXPECT MORE AVAILABILITY OF PUBLISHING DEALS.

Our study has shown there's cause for optimism in the game publishing landscape too, with 76% of developers anticipating increased availability of publishing deals. After a period of caution, publishers are primed to re-enter the market with fresh energy - something which the renewed enthusiasm at industry conferences towards the end of 2024 started to signal. This shift reflects a broader resurgence in publisher confidence, driven by stronger global market conditions and a growing appetite for innovative content.

For developers, this trend represents a wealth of new opportunities. Traditional publishers are no longer focused solely on large AAA titles. Instead, they're actively looking to partner with smaller studios to diversify their portfolios with unique, standout games - take dedicated casual game publishers like *Homa*, *Kivalee* and *Sandsoft* as examples. In many cases, these publishers are even offering more favorable deal structures now than in days gone by, with co-development partnerships and milestone-based payments that allow smaller teams to retain greater control of their IP. This approach reduces risk for both sides and creates a more collaborative development process.

Meanwhile, self-publishing remains a powerful alternative. Tools and platforms have advanced to the point where smaller developers can release games independently with far fewer barriers than ever before. Self-publishing platforms provide developers with direct access to global audiences, offering a path to market without a traditional publisher's involvement.



However, it's clear that a hybrid approach - where developers secure strategic publishing deals for certain releases while self-publishing others - is becoming a common strategy.

At Metaplay, we see this shift as an opportunity for developers to increase their leverage. With more publishers competing for innovative content, studios now have the flexibility to choose partnerships that best align with their creative and commercial goals. This dual approach allows developers to keep creative control while benefiting from the resources and reach of established publishers. The result is a more dynamic, developer-friendly publishing landscape that's set to accelerate as the industry evolves even further.

* The Game Development Renaissance

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More publishers and investors are actively looking for new games again. After a period of budget freezes, I've seen more activity at recent industry events, with publishers ready to roll out new content for 2025 and beyond.”



ELENA
LOBOVA

Head of Strategic
Partnerships,
Bunny Games



74%

of game developers
are anticipating
broader game
distribution.

The way games are distributed is shifting, and fast. With 74% of developers anticipating broader distribution opportunities, it's clear that studios see a future where players can access games in more places than ever before.

A key driver of this shift is the web's resurgence as a gaming platform. Thanks to WebGL and HTML5, high-quality games can now run directly in browsers, removing the need for downloads or installs. This makes it easier for studios to reach players wherever they are - on desktop, mobile, or anything with a web browser. As more developers tap into this channel, the web is quickly becoming a serious contender for mainstream game distribution.

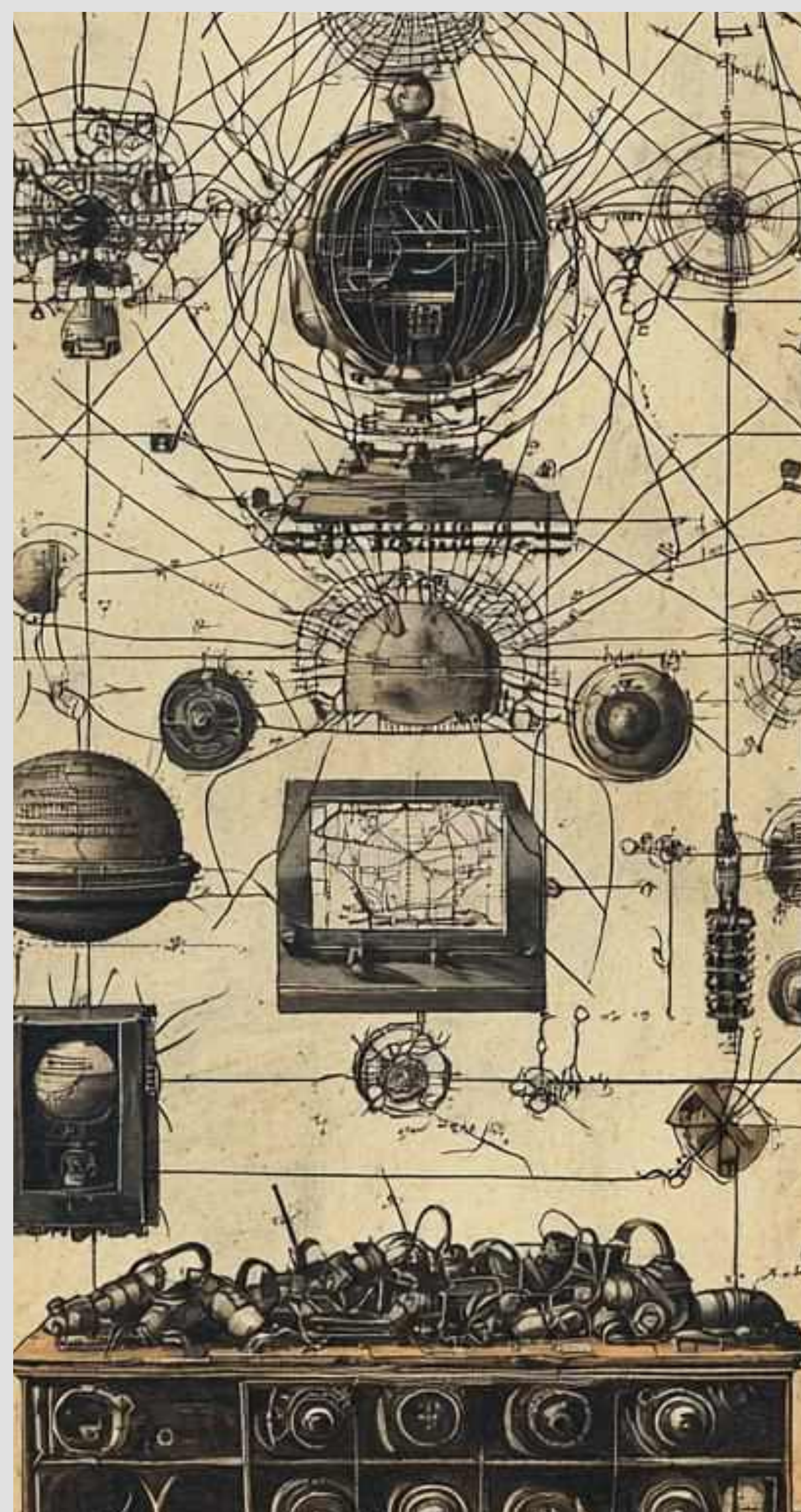
Meanwhile, alternative app stores like Samsung's Galaxy Store and Huawei's AppGallery are giving developers more ways to reach players. Crucially, they also offer better revenue shares than Google Play or Apple's App Store. For developers, that means bigger margins and less dependence on a single gatekeeper, a win on all fronts.

The regulatory landscape is also shifting. The EU's Digital Markets Act (DMA), which came into effect in early 2024, forces companies like Apple to allow third-party app stores on their devices. This change could significantly impact game distribution in Europe. Indeed, from 2025, the Epic Games Store is set to become available pre-installed on all Telefónica devices - a move which could have seismic consequences in this historic landscape shift.

As well as in Europe, Epic Games' high-profile lawsuit against Apple in the US has put pressure on the "walled garden" model of app stores, pushing for a more open and competitive market. These regulatory changes are setting the stage for a future where studios have far more control over how and where they distribute their games.

New distribution models are also being driven by vast improvements in direct-to-consumer (DTC) platforms. Companies like Appcharge are leading the way, enabling developers to sell in-game items directly to players without relying on app store payment systems. After raising \$26 million in Series A funding in late 2024, Appcharge is expanding its platform to support even more developers, offering them the ability to keep a bigger share of revenue. It's a sign that DTC models aren't just a trend, they're here to stay.

For us, this shift can be nothing but good news for game studios. Broader distribution channels mean studios are no longer boxed in by the big app stores. Web-based storefronts, alternative app stores, and direct-to-consumer platforms create more opportunities to reach players directly and boost margins. Metaplay's backend is built to help studios tap into these distribution opportunities quickly. With webshops easy to bolt onto our tech stack, developers can go direct-to-player with minimal friction. The takeaway? Game distribution is becoming more diverse, open, and developer-friendly. Studios that embrace these new channels will be the ones with the most reach, revenue, and resilience as the industry evolves.



“

The massive rise in alternative app stores and web-based distribution is no secret. With Samsung, Huawei, and Xiaomi stepping up, developers now have more leverage to negotiate better margins and access new user bases. It's a shift that puts more power back into the hands of developers.”



MICHAEL
Hudson

CEO,
KYLN

71% OF GAME DEVELOPERS ARE ANTICIPATING MORE DEMAND FOR CROSS-PLATFORM GAMES.

* The Game Development Renaissance

On the back of broader game distribution, player expectations for cross-platform play are surging, with 71% of developers anticipating greater demand. Players now expect to start a game on mobile, continue on console, and finish on PC, all while maintaining progress. For developers, this means cross-platform functionality must be built from the ground up.

This shift is driven by player habits. Today's players move fluidly between devices - mobile on the commute, PC at home, console with friends. It's a connected ecosystem, and players want to move within it without barriers. Games like *Fortnite* and *Genshin Impact* have set the standard, offering seamless progression, shared accounts, and cross-device in-game purchases. Their success has redefined player expectations for live service games, putting pressure on Unity free-to-play developers to deliver a similar experience.

Cross-play also fuels new social experiences while deepening existing ones. When players mobile can seamlessly join friends on console or PC, it removes platform barriers that once divided communities. This drives engagement, especially in co-op and competitive live service games. Developers see this as a crucial growth opportunity, as more engaged players are more likely to make in-game purchases.

The resurgence of browser-based gaming adds another dimension. As we discussed overleaf, WebGL and HTML5 allows players to access high-quality games instantly through a browser - no downloads, no installs - giving an easy entry point for casual or lapsed players to get back into a game. In today's LiveOps-driven era, enabling studios to re-engage dormant players with minimal friction in such a way has become a player expectation. Fortunately, developers today have the tooling to make that a reality.



“

We're hearing a lot more about developers looking to port their games to the web or alternative platforms. With the evolution of WebGL and HTML5, web is becoming a serious distribution channel again, and that shift opens up cross-platform possibilities that weren't viable before.”



GIL
TOU LY
CMO,
Appcharge

53%

OF GAME DEVELOPERS ARE ANTICIPATING LOWER GAME DEVELOPMENT COSTS.

The past few years in gaming have been defined by one key theme: efficiency. Nearly two-thirds of developers now expect production costs to decrease. But this shift isn't just about tighter budgets - it's driven by smarter processes, better tools, and external solutions that let studios focus on what they do best. The result is lower development costs, leaner production pipelines, and more sustainable games and businesses.

A clear example of this shift is the evolution of game engines. In the past, studios had to build custom engines from scratch - an expensive, time-consuming process requiring dedicated teams for maintenance. Then Unity arrived, democratizing game development with accessible, multi-platform tools. Today, a similar transformation is happening on the backend. Studios no longer need to build bespoke systems for authentication, matchmaking, or LiveOps. Metaplay provides these services off-the-shelf, offering the backend equivalent of what Unity did for engines: ready-to-use battle-tested infrastructure that saves huge amounts of time, money, and effort.

This shift extends beyond engines and backends. LiveOps automation, AI-assisted development, and third-party analytics are reshaping production too. Payment processing, player analytics, and generative AI for concept art, animation, and dialogue are now automated, allowing studios to prototype faster and reduce costs during early development.

Perhaps the most profound change is in team size and structure. Where teams of 200 were once required, leaner teams of just 20 can now achieve

similar outcomes. External tech allows smaller teams to scale capabilities without ballooning headcount, empowering smaller studios to deliver the polish and sophistication of much larger teams.

In the *Game Development Renaissance*, studios are no longer limited by legacy infrastructure or bloated production costs. By leveraging platforms like Metaplay's backend, they can reduce technical complexity, cut costs, and achieve more with fewer resources - an idea we explore further in the final chapter, *The Revolution Will Be Externalized*.



* The Game Development Renaissance

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With the right tools, smaller teams can now achieve what used to require much larger teams and far more time. What felt impossible 10 years ago is now standard practice, thanks to better, more accessible technology that allows teams to do more with fewer resources.”



RIKU
Raikola

CEO,
Future Run

75%

of game developers
are anticipating
greater availability
of high-quality tooling.

The future of game development is being shaped by a powerful mix of smarter tools and backend technology, with 75% of developers anticipating greater availability of high-quality tooling. This allows studios of all sizes to keep a better handle on costs, and focus on creative innovation instead of wrestling with technical complexity.

“

There are more external tools available now. Five years ago, we were building everything in-house with a team of over 30 people for one mobile game. I don't see that happening today. The playing field is more level now—smaller studios have access to the same high-quality tools as the big players.”



MARKUS
Hjort

CTO,
Bitmagic

Not long ago, studios had to build everything from scratch - game engines, content pipelines, payment systems, LiveOps tools, and multiplayer servers. It was costly, slow, and exclusive to studios with large development budgets. But just as the printing press democratized publishing during the Renaissance - allowing writers to distribute ideas globally - modern development tools are unlocking high-end game creation for studios of all sizes. We've discussed how Unity did this for game engines. Today, a similar revolution is transforming the broader game development pipeline a whole. Here are some of the most impactful areas:

Game Backends-as-a-Service (GBaaS)

Game launches used to be high-risk. Player surges could crash custom-built servers, as seen with *Diablo III*'s infamous *Error 37*. Today, pre-built server infrastructure stacks prevents these disasters by automatically detecting issues, restarting servers, and scaling capacity during player spikes. Backend providers like Metaplay offer such insurance baked-in, so game studios no longer need to build or maintain backend systems in-house. Instead, they outsource complexity while retaining full creative control, allowing them to focus on making games, not tech.

LiveOps and Automation

LiveOps powers live service games with real-time events, seasonal updates, and time-limited offers. Traditionally, this required large teams working around the clock. Today, platforms (you guessed it: like Metaplay) offer LiveOps automation, enabling developers to schedule events, push offers, and target player segments automatically. Studios can launch global campaigns and update in-game content dynamically, without manual intervention. This means smaller teams can run larger games with AAA-level polish, delivering the depth and engagement of live service giants with fewer resources.

AI in Asset Creation

We've already touched on how AI is reshaping game development workflows. Tasks like concept art, animation, and QA testing - which once required months of manual work - are now completed in hours. Generative AI can produce character art, procedural environments, and even art for trade magazines (see what we did there?).

Blockchain and Digital Ownership

Although the blockchain hype has cooled compared to years gone by, its potential is still astronomical. The core value proposition of building on blockchain - to facilitate transactions and digital ownership - is already evolving into something more seminal, as indicated by the rise of AI agents being made specifically on the blockchain. Like more general AI agents, these are AI-powered systems designed to perform specific tasks within blockchain and cryptocurrency ecosystems. As well as solving particular player-facing problems like payments, inventory, and wallets, blockchain could allow developers to integrate more deeply with more complex tech and tooling, which, in turn, could allow developers to offer more valuable experiences to players.

Reducing Technical Debt

When studios build custom systems for matchmaking, payments, or player authentication, every update and patch adds to the long-term maintenance burden. By outsourcing these core systems to providers like Metaplay, studios transfer support, bug fixes, and upgrades to an external partner. This lets developers focus on player experience and design rather than patching old systems. For small-to-medium studios, this approach offers agility that larger competitors struggle to match.

A New Development Paradigm

The true hallmark of the *Game Development Renaissance* won't be any single tool - it will be the alchemy of them all. GBaaS, LiveOps, AI, blockchain, and the explosion of cross-platform play and new distribution channels are not isolated forces. Their real power lies in how they intersect, amplify, and evolve together. No one can predict the precise outcome of this fusion, but one thing is clear: the whole will be greater than the sum of its parts.

What is certain is that this revolution will be powered by externalization. The savviest studios will double down on what matters most - crafting IP, building exceptional products, and delivering unforgettable player experiences - while externalizing the rest. The developers who master this shift will be the ones to discover and define the next great development paradigm, well before the rest of the industry catches on.

“

We're seeing potential to do things that have never been done before. The technology out there today, with the vast scale of advancements in networking tech, will help developers unlock new design and development paradigms and allow them to push past boundaries that previously seemed impossible.”



Robin
Squire

CEO,
Black Block

73%

OF GAME DEVELOPERS EXPECT LIVE SERVICE GAMES TO HAVE DEEPER METAGAMES.

* The Game Development Renaissance

The meta has become a core pillar of live service success, with 73% of developers expecting deeper, more engaging metagames. Gone are the days when a simple daily login bonus was enough to maintain engagement. Today, players expect layered systems that give them reasons to return daily, weekly, and even hourly. Modern live service games are embracing more sophisticated meta design, combining multiple progression paths, seasonal event structures, and overlapping challenges to create rich, long-term engagement.

This shift is being driven by the advancements in LiveOps tooling and segmentation we've been discussing. Studios are now able to personalize player journeys with dynamic events that adapt to player behavior: For example, one player might receive a time-limited event focused on unlocking a new character, while another might see an exclusive offer to complete a challenging mission. These tailored experiences create a sense of constant novelty, encouraging players to re-engage more often.

Moreover, deeper metagames offer new opportunities for monetization. Instead of relying on impulse-driven microtransactions, studios are driving long-term spending habits through progressive systems like season passes, battle passes, and collectible tracks.

Games that have set the gold standard for well-designed metagames, like *Brawl Stars* and *Royal Match*, show how overlapping goals - including seasonal challenges, special event missions, and mastery paths - can significantly increase player retention and daily playtime.

For studios, the goal is no longer to sustain a game for a few years - it's to create 'forever games' that can generate long-term revenue. By building compelling, multi-layered metagames, developers are setting the stage for live service experiences that keep players coming back for years to come.



“

We're seeing a boom in hyper and hybrid casual games that combine successful experiences with deeper core loops and more progressive meta. The goal is to create better-performing projects that keep players engaged for the long term.”



KATERINA
Burbela

Business
Development,
Homa

76%

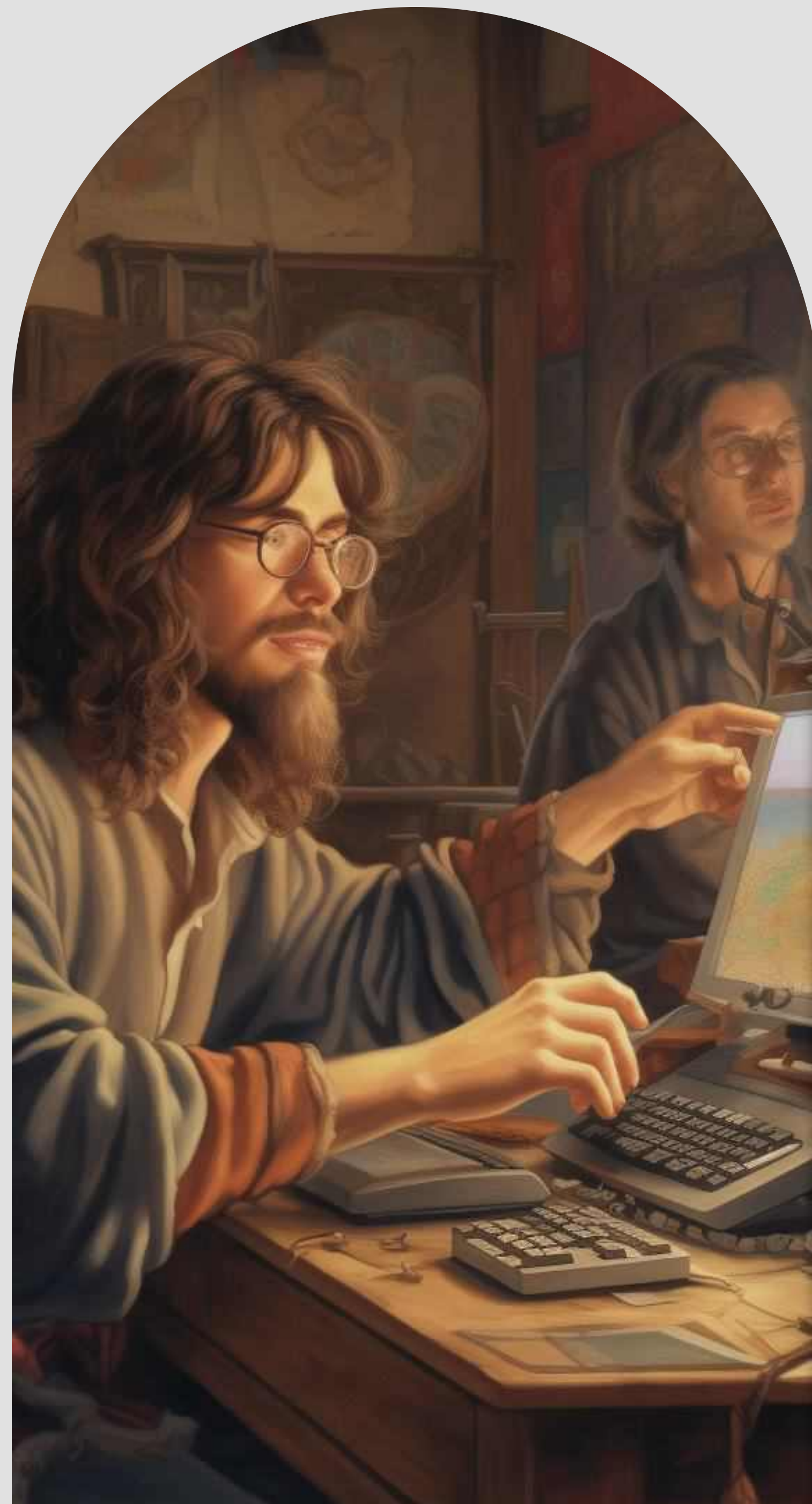
OF GAME DEVELOPERS EXPECT LIVE SERVICE GAMES TO GENERATE MORE REVENUE.

Following the expectation that live service games will improve overall, developers are also anticipating that live service games will generate more revenue. Unlike traditional pay-once models, live service success comes from ongoing engagement and repeat player spending. While headline games like *Fortnite* and *Honkai: Star Rail* are often cited as prime examples - titles like *Merge Mansion* and *AFK Arena* have shown that sustained revenue isn't reserved for the biggest players. Through good game design and by focusing on strong retention, frequent updates, and personalized player experiences, these games have achieved long-term revenue success.

We've been discussing that the not-so-secret secret to revenue growth in live service isn't just about adding more content - it's about using LiveOps intelligence to deliver the right content at the right time. Studios now leverage player data to drive smarter engagement strategies. Limited-time offers, exclusive events, and player-segmented rewards are all designed to prompt timely spending. For instance, lapsed players might receive an exclusive re-engagement bonus, while dedicated players could be offered a unique event bundle. This personalization of LiveOps is proving to be a powerful revenue driver - and one that's still just at its beginning.

Another key shift is the industry's renewed focus on legacy portfolios. Instead of constantly launching new games, studios are looking at how existing games can be optimized to drive higher returns.

Updates, balance patches, and fresh LiveOps events breathe new life into older titles. This strategy reduces the risk of new product launches while providing stable, ongoing revenue - a feature that's set to be a staple of the Game Development Renaissance.



✦ The Game Development Renaissance

“

Studios are focusing back on their legacy portfolios, looking at how LiveOps can increase revenue by boosting engagement and monetization. The low-hanging fruit is often in optimizing existing games rather than launching new ones.”



MICHAIL
Katkoff

Founder,
Deconstructor
of Fun



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Chapter 2



THE
REBIRTH
OF PRODUCTIVITY,
EFFICIENCY & GROWTH



The Rebirth of Productivity, Efficiency & Growth

After years of fluctuating headcounts and inflated development costs, the games industry is shifting toward leaner, smarter, more focused operations, and learning to scale in ways that prioritize long-term sustainability over short-term wins. Here, we summarise some of our discussion on this from the previous chapters, and speak to *Future Run* CEO Riku Rakkola for first-hand insight on how studios are making this triumvirate a feature of their *Game Development Renaissance*.

Productivity

Studios are redefining productivity by focusing on value-added tasks inspired by creativity, rather than repetitive, manual tasks which characterised game development in years gone by. For example, instead of wasting resources on building servers, dashboards, and infrastructure, the best teams are outsourcing these tasks to best-in-class tooling providers. Outside of direct game development, we're seeing the same trends in marketing too. Not only can user acquisition campaigns bids be automated, production of the creative variants required to optimize CTAs, localizations, colours, and more can be too. Once upon a time, all of this required many people to do weeks of work. Now, studios can get the same result at the click of a mouse. This allows developers to focus on player experience and creative design - the things that set a great game apart from a good one.

Efficiency

After the turbulence of recent years, efficiency is now a non-negotiable. It's not just about doing things quickly - it's about doing them right the first time. Smart studios are embracing systems that reduce friction and remove manual labor from development, and having the common sense to do this at the earliest stages of production. With less than a day's worth of planning while in pre-production, experienced developers can map out future requirements of their game on the basis of how they'd want it to look say three, five, and seven years down the line. Each of these stages is characterized by a different level of audience of product maturity, and different tech requirements to match. At that point, the studio has a decision to make: does it spend its time building its own tech to try and keep up with the ever-evolving demands of their game and its players, or do they make the efficient choice and license a tool that can take them to the same (if not better) result at a fraction of the cost? The results from our survey suggest that it's becoming a no-brainer - savvy studios are increasingly leveraging tooling to get them to where they need to be faster and better than they otherwise could.

Growth

Contrary to what's been popular industry sentiment over the past couple of years, the games industry has not actually been in decline. As we highlighted in Chapter One, it has been growing, albeit more steadily than the double (sometimes triple)-digit growth rates that blessed us all in the 2010s and early 2020s. The Game Development Renaissance then is not a *return* to growth, but more an appreciation of it - a realization that we should no longer be taking it for granted. Nobody wants to go back to 2022 or 2023, but we can at least be grateful for those years teaching us that everything in games won't always be sunshine and rainbows. We've learned that growth is something we can only sustain if we adopt the mantras of *Productivity* and *Efficiency* the right way, and don't fall back into the similar boom-and-bust hiring-and-firing traps of years gone by.



The Rebirth of Productivity, Efficiency & Growth.

Q&A with Future Run CEO Riku Rakkola



With a mantra to *Redefine competitive gaming*, **Future Run** is a new Supercell-backed game studio building a competitive PvP game with native cross-platform compatibility. We caught up with their CEO, Riku Rakkola, about their approach to developing *Riot Ball*, their new live service Unity game set for release in early 2025.

Metaplay: Studios are being challenged to deliver more with fewer resources. How do you see this shift affecting game development?

Riku Rakkola: “The biggest change is the availability of better tools. Ten years ago, making a game of this scale with a five-person team would’ve been unthinkable. Back then, you’d need 50 people to pull it off. Today, smart tech choices make it possible for five people to achieve what 50 did. This shift has leveled the playing field for small studios. They can be agile, move fast, and compete with much larger teams because they’re not wasting time on things that don’t directly affect gameplay.”

What kinds of tools or processes do you think have had the biggest impact on this shift?

Riku: “LiveOps and backend services have been game-changers. Once upon a time, if you wanted cross-platform progression or player segmentation, you had to build it all from scratch. That could take months or even years. Today, you can access all of that and more through

existing solutions. No small studio could build a hybrid-casual game today without leveraging external tools. For smaller teams, it’s a necessity, not a luxury.

“There’s also AI - it’s everywhere. We can generate 10 art concepts in a day that would have taken a week before. QA is being transformed by AI as well. AI models predict player behavior and identify edge cases that human testers might miss. The goal isn’t to replace people but to give them superpowers.”

There’s been a transition from building everything in-house to relying on external tools. What’s driving that?

“Studios have realized that building everything yourself doesn’t make you special. Your edge as a studio isn’t your payment system or LiveOps engine—it’s your creativity and ability to deliver a great player experience. Offloading everything that isn’t ‘core’ allows you to move faster, cut costs, and launch sooner.

“There’s also investor pressure. One investor told me recently that burn rates are under more scrutiny than ever. Investors want to see lean, efficient teams. If your team is reinventing payment systems or custom backends, you look like a risky investment. The smartest studios are using off-the-shelf tools and lean production models with smaller core teams supported by external tech providers.”

What's your advice for studios trying to be more efficient and productive?

“It's simple: focus on your core, outsource the rest. Ask, ‘What do we do better than anyone else?’ If the answer isn't ‘building a payment system’ or ‘managing LiveOps infrastructure,’ then don't build it. Use what's already out there.

“This shift isn't just for small studios. Big studios are waking up too. They're realizing they've wasted resources on systems that specialized providers can handle better. Smart studios aren't just building great games - they're building great systems to support them.”

How can smaller studios maintain a competitive edge against larger, more established studios?

Riku: “The funny thing is that smaller studios have an advantage in certain areas. Big studios have huge, rigid systems. Changing a production pipeline at a large studio takes years. Smaller teams are more agile. They can adopt AI tools faster, try new ideas, and pivot quickly.

“Look at hybrid-casual games. Smaller studios figured out how to combine social loops and LiveOps into hypercasual-style games long before big studios caught on. By the time the larger players realized what was happening, smaller studios had already taken a big slice of the market.”



Looking to the future, what will define the next wave of game development efficiency?

Riku: “Unlocking efficiencies earlier in development will be key. Too often, studios think about efficiency after problems arise. It's smarter to think about it from day one. When we start development on a new game, we ask what tools we'll need in year one, year three, and year five of the game's lifecycle.

“We look at the big picture, not just immediate needs. The games that stay relevant for longer are the ones that plan for that journey from the start.

“Finally, there's going to be a shift in team culture. We're learning that you don't need a huge team to make a hit. Lean, agile teams with smart tooling choices can ship games that rival anything from big publishers. It's no longer about the size of your team—it's about the efficiency of your team. The smartest teams are asking, ‘What's the fastest path to success?’ and ‘What can we automate, simplify, or outsource?’ Those are the questions that will drive the next era of productivity.”





Developers

Developers

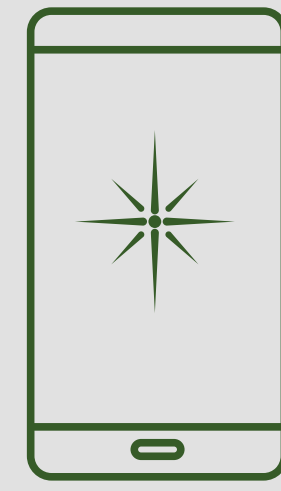
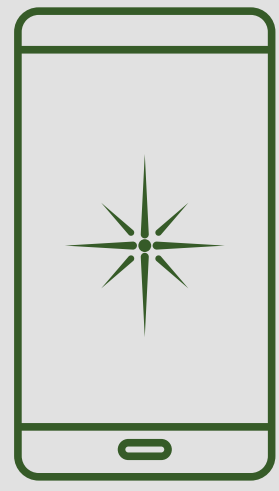
LiveOps



Chapter 3

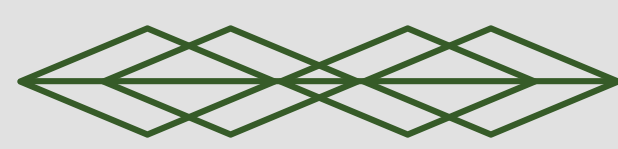


LiveOps Leads THE Way



38%

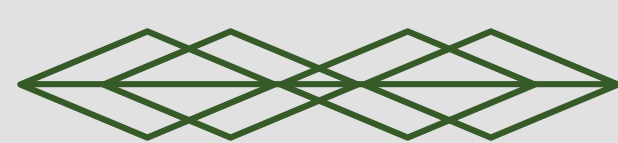
of developers say regular content updates and LiveOps is the most important factor to shipping a successful game today

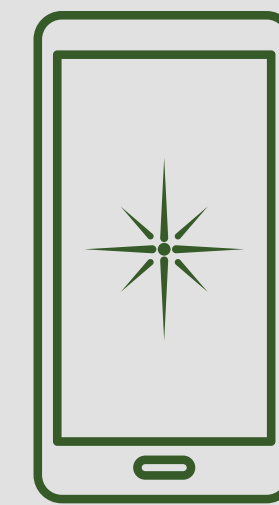
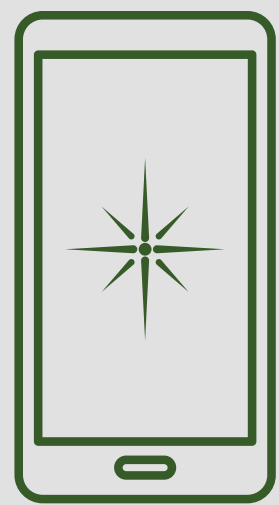


BUT
One
IN EVERY
Four

developers only start thinking about LiveOps after their game's entered global launch.

We can do **better** than that.





With 38% of developers surveyed citing regular content updates as the most important factor for shipping a successful game today, it's clear that LiveOps is no longer optional - it's essential. Yet, surprisingly, one in four game developers only start thinking about LiveOps after global launch. This reactive approach puts studios on the back foot, forcing them to retrofit systems that should have been integral from the start.

The best-performing live service games prove that LiveOps must be part of the foundation. We've touched on how *AFK Arena* does an especially good job of thriving on event-driven engagement loops. Seasonal events, hero trials, and time-limited challenges aren't tacked on post-launch - they're woven into the game's design. Similarly, in *Merge Mansion*, the top-grossing Unity mobile game made with Metaplay, players are constantly given fresh puzzles and time-gated content drops, driving daily returns and session length. These games are proof that early LiveOps planning extends a game's lifecycle and ensures steady revenue, not just launch spikes.

For studios, the takeaway is simple: design with LiveOps in mind from day one. Content pipelines and delivery, in-game event management, and player segmentation can no longer be afterthoughts. Instead, they should be baked into the core loop. While it is possible to bolt on LiveOps post-launch, it's rarely efficient. The opportunity cost of waiting is far too high, and with player expectations for constant content only growing, those who get ahead early will be the ones who win in the end.



LiveOps Leads the Way

Q&A with Kwalee VP Mobile Games John Wright.

Kwalee is a UK-based game developer and publisher known for its success in hyper casual, hybrid casual, and casual games. Since 2011, Kwalee has amassed one billion downloads across its portfolio of games which includes hits like Draw It and Teacher Simulator. With studios in the UK, India, China, and Portugal, Kwalee has grown into a global force in mobile gaming, known for its fast, iterative approach to game development. We caught up with John Wright, VP of Kwalee's mobile games division, to pick his brains on a core theme of the Game Development Renaissance: LiveOps.

Metaplay: LiveOps has become essential for modern game development. What's driving this shift?

John Wright: "The biggest successes in 2024 didn't come from new games - they came from LiveOps. If you look at the top 100-grossing games today, most of them are over four years old. We used to call them 'evergreen' games, but now, they're becoming 'forever games' that can stay relevant for seven to ten years. That's a massive shift. LiveOps is at the heart of that transformation."

What LiveOps strategies have you seen that are particularly effective?

John: “Event design has become much more sophisticated. Look at Royal Match. Instead of one 21-day event, you’ll see four or five live events running at once. Players are now incentivized to complete multiple events simultaneously. It’s a brilliantly effective strategy because it increases daily session length. More playtime means more ads watched and more opportunities for payers to convert. That’s a win for everyone - players stay engaged for longer, and studios see higher revenue.

“Another major strategy is IP collaborations. We’re seeing big brands like Transformers, Godzilla, and Teenage Mutant Ninja Turtles appear as time-limited integrations in games. Instead of building entire games around these IPs, studios are weaving them into limited-time events. Players get exclusive characters or cosmetics, and the demand for these items is enormous. These integrations also drive down acquisition costs since brand recognition drives organic downloads. People see their favorite IPs featured in a game, and suddenly, they’re motivated to check it out. It’s a cost-effective way to tap into new audiences and convert them into high-quality users.”

What role does personalization play in LiveOps today?

John: “Personalization is about meeting the player at the right moment. If you have one player who prefers PvP battles and another player who loves story-driven quests, you can now show them different in-game offers or events based on their behavior. Studios have become much more intricate with A/B testing and price testing. We’re seeing offers for ‘no ads’ packages tested at multiple price points, sometimes with second-time payers to see which offer converts best. It’s about tailoring offers to player behavior. With better data, we can create personalized offers that hit at the right time, boosting retention and revenue. This is one of the key reasons why older live service games are outperforming new launches.”

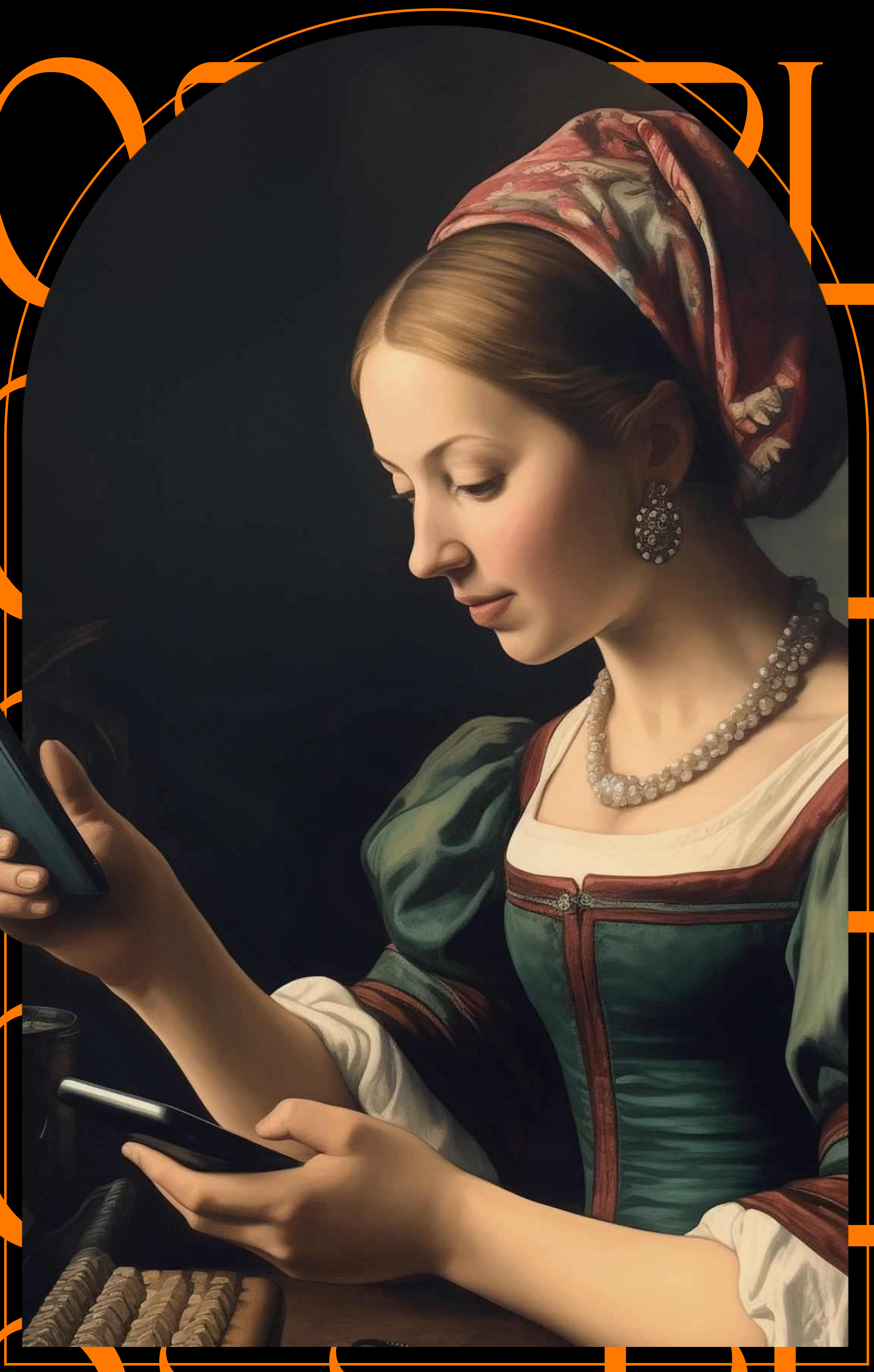


If you could give one piece of advice to studios trying to improve their LiveOps, what would it be?

John Wright: “Don’t run one big event every season and call it LiveOps. It’s old-fashioned. The trend is to run multiple overlapping events that reward players for completing several objectives at once. The big shift is to offer bonus rewards for completing two or three events at once, which extends session time and increases ad impressions. If you’re not doing this, you’re leaving money on the table.”



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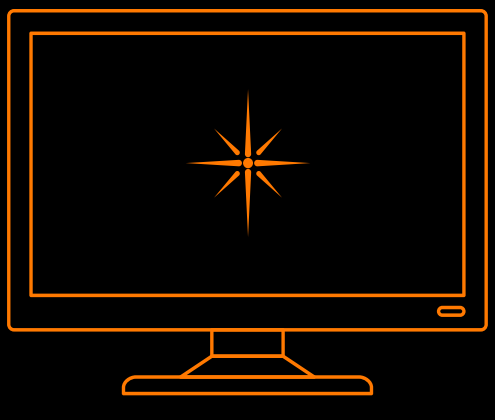




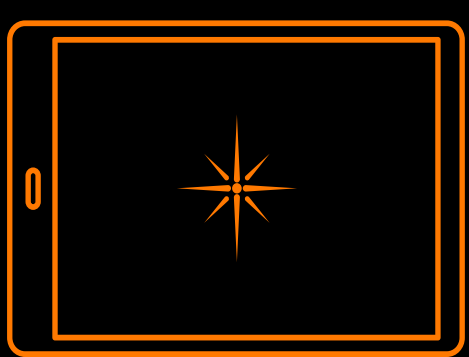
Chapter 4



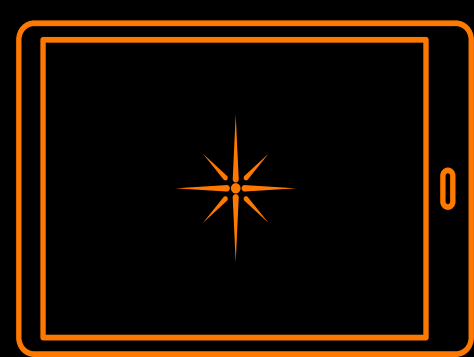
The Case FOR Cross-Play



The Case for Cross-Play



The Case for Cross-Play



The Case FOR Cross-Play



MORE THAN

13

DEVELOPERS

consider cross-platform
capability crucial to
shipping a successful live
service game in 2025.





Cross-platform functionality has evolved from a technical bonus to a strategic must-have. More than 1 in 3 developers believe cross-platform capability will be the most crucial factor for successful live service games in 2025, with 71% expecting demand to grow. Players now expect to switch seamlessly between mobile, PC, and console without losing progress, purchases, or social connections.

On the preceding pages, we've discussed how eliminating barriers that once constrained players is crucial to fuelling the social connections that drive player loyalty. When players can maintain friendships across devices, they stay invested longer, leading to higher engagement and stronger community bonds.

That makes the business case clear. Games with cross-play enjoy higher lifetime value (LTV) and lower churn. Players who can move across platforms are more likely to stick around, engage with LiveOps, and make in-game purchases. Cross-play also signals quality: players see it as a hallmark of a seamless, player-first experience, driving trust and loyalty. For smaller studios, delivering such cross-platform functionality demonstrates technical excellence and signals to investors that they're ahead of the curve.

That said, supporting multiple platforms brings complex infrastructure challenges like handling progression syncs, payment unification, and matchmaking. But modern tools are leveling the playing field. Unity's cross-platform frameworks and backend providers like Metaplay make it easier for smaller studios to deliver polished cross-platform experiences. What once required large engineering teams can now be achieved by leaner, more agile studios.

Monetization strategies are also shifting in line with this movement. Developers are using web-based storefronts and payment systems like Appcharge to avoid traditional app store fees and help players to seamlessly transfer payments between devices. That gives players a frictionless buying experience, while developers retain more revenue.

The distribution evolution we've been discussing helps this, too. The availability of alternative platforms beyond traditional app stores reduces download friction and helps developers tap into new audiences. Combined with cross-platform functionality, this ensures studios can reach a broader audience with minimal friction.

By 2025, studios that design for cross-platform from day one will have a significant advantage. They'll reach more players, extend their games' lifecycles, and unlock more predictable revenue streams. The shift toward an 'everywhere' distribution model means studios can create true live service experiences with play-anywhere accessibility, making their games more attractive to players and investors alike.



The Case for Cross-Play

Q&A with Gil Tov Ly,
CMO of Appcharge



Appcharge is a leading provider of custom webshops for game developers, enabling studios to sell in-game items and currency directly to players. By bypassing traditional app store fees, Appcharge helps developers increase revenue and maintain control of player payments. Their platform supports seamless integration across mobile, web, and cross-platform games. As part of our Renaissance series, we sat down with Gil Tov Ly, Appcharge CMO, to pick his brains on the cross-platform revolution - and why webshops should be at the heart of it.

Metaplay: We've seen growing interest in alternative app stores. How do you think this will impact the industry?

Gil Tov Ly: "There's a lot of energy around alternative app stores right now. The Epic Games Store started the conversation, but now it's much bigger than that. Developers are looking at platforms like Aptoide, Huawei's AppGallery and Samsung's Galaxy Store to break free from the traditional app store model.

"It's not just about avoiding the 30% fee—it's about having more control over distribution. Some developers are even launching multiple versions of their apps, some with in-app payments and some with alternative payment methods.

It's a chance to diversify risk and avoid being beholden to one platform. We're seeing developers experiment with browser-based games, too. Platforms like WebGL and HTML5 are turning the web into a serious distribution channel again. Ten years ago, nobody thought of the web as a platform for full-featured games, but that's changing. Web games can now offer the same experiences as native apps, and that opens up so many doors for both discovery and distribution."

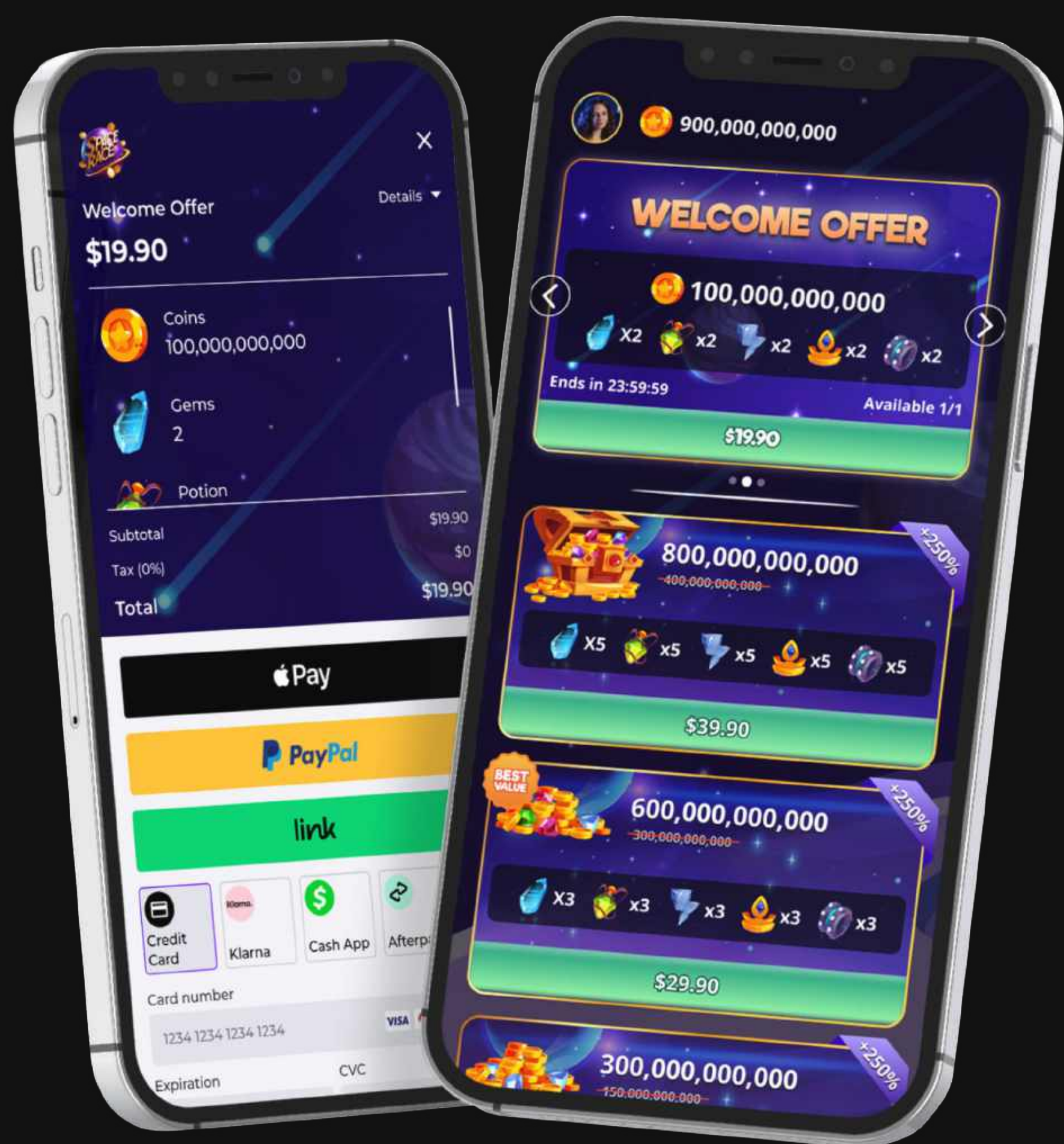
Metaplay: How do webshops fit into this cross-platform and alternative app store strategy?

Gil Tov Ly: "Webshops are the next logical step. If you're already playing on multiple devices, why not buy from multiple places too? By letting players purchase directly from a developer's custom webshop, you cut out platform fees from app stores. It's not just about selling items or currency—it's about creating a unified experience. Players can log into a webshop from their browser, buy what they need, and have it instantly available on mobile, PC, or console. Studios are evolving webshops from being just 'a store' to being full-blown player hubs for news, matchmaking, and exclusive content."

Metaplay: What's the biggest opportunity for developers in cross-platform and webshop integration?

Gil Tov Ly: "It's about control. If you're relying on app

stores for payments, you're giving up 30% of every transaction. With webshops, you own that payment relationship with the player. The margins are better, and you have direct access to player data, which means you can run smarter offers and personalize player journeys. Developers are starting to see this as essential, not optional. The rise of D2C (Direct-to-Consumer) is one of the biggest trends we're tracking for 2025."



Metaplay: You mentioned that webshops are evolving into player hubs. Can you elaborate on that?

Gil Tov Ly: "Yes, this is something we're seeing more and more. Developers don't just want a store—they want a central space where players can check for game updates, see news, access exclusive content, and even participate in community-driven activities like polls or contests. It's about giving players one destination they keep coming back to. Instead of trying to direct players to five different places for news, content, and support, you give them a single entry point—the webshop. Some developers are even integrating matchmaking into these hubs, where players can schedule matches, join communities, or form teams."

Metaplay: How do you see D2C evolving in 2025?

Gil Tov Ly: "The biggest shift we're seeing is the evolution from webshops as simple stores to multi-layered engagement platforms. It's not just about purchases anymore. It's about creating places where players come to check for game news, join live events, watch streams, or even engage in discussions. This shift is being driven by player demand for more personalized, community-driven experiences. Developers are seeing the benefit of keeping players inside their own ecosystem rather than pushing them to external platforms for content, support, or social interactions. This makes it easier to create sticky, recurring engagement."

"D2C also gives developers more leverage in how they distribute games. If you think about it, for a long time, everything went through app stores, and developers had to play by their rules. But we're now seeing developers expand their distribution models. Alternative app stores like Huawei's AppGallery and Samsung's Galaxy Store are opening new doors, but so is the web itself. With WebGL and HTML5 powering browser-based games, developers can now deliver full-featured game experiences without the need for a dedicated app download. This creates a new distribution model that's more flexible and player-friendly. It's something we expect to see a lot more of in 2025."

Metaplay: What excites you most about the gaming industry as we head into 2025?

Gil Tov Ly: "I think it's the potential return to some of the energy we saw during the 'golden years' of mobile gaming. Back then, profit margins were high, UA costs were low, and studios could do some wild, creative things. We had big marketing campaigns, celebrities in ads, and amazing creative work. In recent years, rising UA costs and tighter budgets have dampened that energy. But I think with D2C models on the rise and profit margins returning, we're going to see a resurgence of that energy. The financial models are getting better, and I think studios will start to take more risks creatively. We'll see more ambitious ideas, bigger live service strategies, and maybe even the return of celebrity-driven marketing stunts."



Cross-Platform Strategy

CHECKLIST



Player Authentication & Account Linking

Allow players to log in on any platform using a unified player ID system so they can transfer accounts seamlessly across platforms.



Progression Sync Across Devices

Sync player progress (XP, achievements, story progress) in real-time across all platforms so players don't lose progress between devices.



Cross-Platform Payment Integration

Enable payments outside app stores via custom webshops to reduce platform fees and ensure items purchased on one device are available across all platforms.



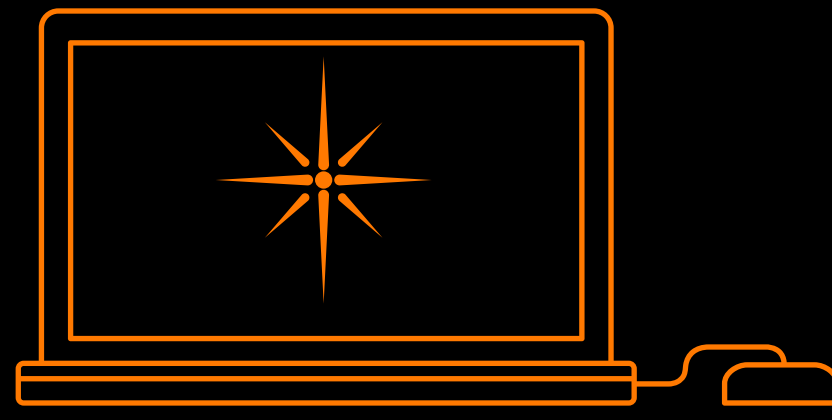
Multiplayer & Cross-Platform Matchmaking

Players should be able to queue for multiplayer matches regardless of device - if they can't match with friends on other platforms, engagement could drop.



Friends List & Social Integration

Support friend lists that work across platforms, so players can see who's online and connect with their friends no matter what device they're using.



Unified player inventory

If a player buys an item on mobile, it should appear on PC. Use a backend like Metaplay to maintain a unified player inventory system and avoid player frustration, refund requests, and churn.



Offer Management & Personalization

Create personalized offers and pricing for different player segments using A/B testing tools and segmentation platforms so you can make the most of in-app purchase opportunities with your broadened reach.



Data Security, Privacy, & GDPR Compliance

Protect player data, especially payment and login information. Choosing the right backend for your cross-platform game will help you ensure compliance with GDPR, CCPA, and PCI-DSS standards.



Anti-Cheat & Security Systems

With more players comes more possibilities of cheaters and hackers. Ensure you have appropriate anti-cheat tooling in place, or, better still, make your game cheat-proof by design by building it on server-authoritative technology, like Metaplay's.



A great game with cross-platform potential

It's self-explanatory, but not all games are built for cross-platform success. If you're making a social game with the potential for a large pool of players to play together in collaborative or competitive game modes, you've likely got a good fit. If you're making a casual single-player, then probably not.





Chapter 5



THE
Revolution
WILL BE
Externalized



48%

of developers are looking to adopt external tech in 2025.

6%

of developers say they're mostly looking to build tech internally.

59%

of developers are planning to launch a game in 2025 because there will be better tech and tooling available.

A man with long hair and a beard, wearing a dark brown coat over a maroon vest and white shirt, stands against a dark background. He is holding a modern smartphone in his right hand, raised as if taking a selfie or recording a video. The lighting is dramatic, highlighting his face and the texture of his clothing.

The Revolution Will Be Externalized

The Game Development Renaissance is being driven by smarter, more accessible external technology and tooling. This shift isn't just incremental progress - it's a fundamental change in how games are built, launched, and scaled. With 59% of developers citing "better technology" as the key reason they plan to launch new games in 2025, it's clear that studios are embracing external solutions at an unprecedented rate.

The numbers tell the story: 48% of developers plan to adopt external tech in 2025, while only 6% plan to rely on internal tech. This shift from 'developer pride' to pragmatic outsourcing reflects a larger truth - success today doesn't come from building infrastructure but from delivering better player experiences.

Smarter Tools, Faster Development

Gone are the days when studios had to build their own backends and other tools from scratch. Developers now have access to modular, ready-to-integrate tools that handle key aspects of development, enabling them to ship games faster, iterate more frequently, and focus on player experience. Platforms like Metaplay enable studios to implement features like cloud saves, cross-platform progression, and LiveOps dashboards without the need for large infrastructure teams.

The key benefits? Third-party backends have always offered speed, but now, they offer customization too. Metaplay especially is built to rival in-house tech for customization capabilities. This is crucial for smaller studios. Much like how the Renaissance shifted construction from handcrafted cathedrals to prefabricated elements, pre-built tooling allows teams to create more ambitious games with smaller teams and faster timelines.

Customization Without Complexity

The old belief that external tech forces 'one-size-fits-all' solutions is rapidly fading. Today, 58% of developers believe external tools are more customizable than internal builds, and 53% say these tools better align with industry best practices (i.e. they believe external tech is better than in-house tech).

API-first design and modular SaaS platforms let developers configure off-the-shelf systems to meet unique gameplay needs. Tools like Metaplay allow customization of player progression, event triggers, and LiveOps content, as well as full game server programmability and a fully-extensible game management dashboard. This is vital for live service games, where fast iteration is essential.

Developers can update event logic, player economies, and in-game challenges without shipping a full client update, enabling faster iterations and better player retention. This level of customization, once exclusive to large AAA studios, is now accessible to smaller teams.

Cost-Efficiency and Risk Reduction

For years, studios clung to the belief that ‘if we didn’t build it, we don’t own it.’ But that thinking has shifted. Today, only 6% of developers plan to rely on internal tech as their primary strategy. Most are focused on buying and integrating existing platforms, and the reasons are clear:

Lower Upfront Costs

Studios can integrate platforms like Metaplay to avoid large upfront costs when starting new projects.

Faster Time-to-Market

With off-the-shelf tools, studios can launch new features in weeks instead of months.

Reduced Maintenance Burden

Maintenance, updates, and compatibility issues are handled by the tooling provider, freeing studios from ongoing technical debt.

This shift mirrors trends in other industries. In retail and e-commerce, companies once built their own payment processors and logistics systems. Now, platforms like Shopify and Stripe handle it. Similarly, the film industry once required in-house VFX departments, but studios now outsource to specialized firms. Game development is following the same path, handing over non-core tasks like scalable game servers and fully-extensible LiveOps engines to specialized providers like Metaplay.

Backends: From Bottleneck to Breakthrough

Backends have long been a bottleneck for game studios. In the past, top-grossing games relied on custom backends, forcing studios to maintain two codebases (client and server) and hire DevOps engineers to keep everything running. This approach was slow, costly, and error-prone.

Tools like Metaplay are changing the game. Metaplay’s single-codebase system lets studios write client and server logic in the same environment. This eliminates the need for two parallel systems, cutting development time and reducing the risk of code drift. Teams can now build new features and ship updates faster than ever before.

But it’s not just about speed. It’s also about risk reduction. If something breaks in an in-house backend system, studios must fix it themselves. But with platforms like Metaplay, maintenance, bug fixes, and compatibility issues are handled by the provider. This outsourced reliability frees developers to focus on player experience instead of server stability.

What’s Next for External Tech?

With more developers planning to adopt external tech than build their own in 2025, this is the new normal. Developers aren’t just moving from build to buy - they’re rethinking the role of the modern game studio. For years, studios were judged on their ability to build everything in-house. In 2025, success will be judged by speed, flexibility, player impact, and revenue.

The Game Development Renaissance opens all kinds of new possibilities for building more sustainable, scalable studios. The smartest studios will be those that embrace external tooling as a strategic advantage. By focusing on what makes them unique and outsourcing everything else, they’ll launch faster, iterate more frequently, and build games that last longer.





The Revolution Will Be Externalized

Q&A with Jere Partanen, Principal at Sisu Game Ventures.



Sisu is a Nordic venture capital fund focused on on games. Established in 2014, they've built a reputation as one of the region's leading investment partners for game studios at (pre-) seed stage. We spoke to Investment Principal Jere Partanen about their approach to funding new studios, and philosophy on external technology.

Metaplay: How has the investment landscape for game studios changed as we head into 2025?

Jere Partanen: “So far, changes like off-platform payments and new UA channels have primarily benefited large incumbents - but there is a gradual shift toward stability. Investors, who pulled back from mobile during the early IDFA disruptions, are warming up again. But this isn't a sea change - it's a slow, steady improvement. We're seeing some renewed interest in mobile, but deal activity is still highly concentrated.”

Are there specific qualities you prioritize when assessing a studio for investment?

Jere: “We look for meaningful design innovation in tandem with strong commercialization skills. Too many Finnish studios, for example, lean heavily on design but lack strength in monetization. Additionally, a distinct distribution thesis is crucial. Relying on current arbitrage opportunities is a weak position - those gaps close quickly. Studios need operational strength and a clear, long-term strategy for standing out.”

Given the current environment, what's your outlook for early-stage studios in 2025?

Jere: “For VCs, early-stage studios are still in a tough spot. We're seeing fewer of them get funded at seed, and those that raised earlier rounds now face higher thresholds to secure follow-on funding. The simple truth is that many of these studios probably shouldn't have raised venture capital in the first place. Not every studio is fit for venture-scale returns, and that's become more obvious as funds get more selective. For early-stage founders, it's important to understand which category you fall into, and adjust expectations accordingly.”

How important is a studio's approach to technology when you're deciding to invest?

Jere: “It matters, but we avoid studios that lean too hard into a 'not built here' mindset. Too many studios default to building everything in-house, which often isn't justifiable, especially for early-stage companies. If there's a compelling reason to build something internally, that's fine. But in most cases, it makes more sense to leverage third-party solutions like backend tools or LiveOps platforms. The industry tends to over-index on building, which wastes time and resources. Investors want to see that studios are focused on making great games, not reinventing infrastructure that's already available.”

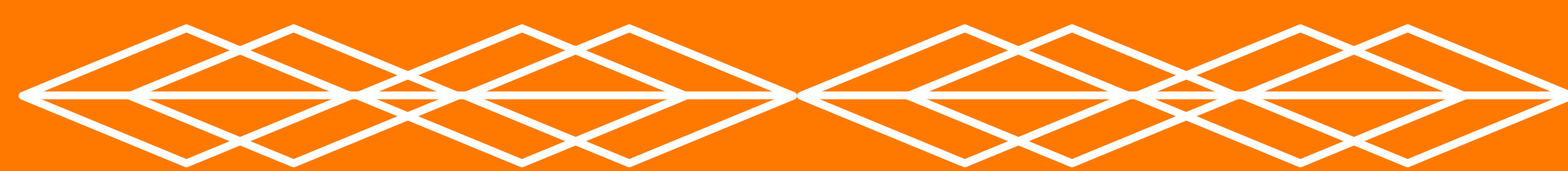




Conclusion



THE DAWN OF A NEW ERA IN
Game Development



CONCLUSION

With all that said, how do you picture the Game Development Renaissance?

We see it as a world of quality games thriving through brilliant LiveOps, creating room for fresh titles to make their mark. For too long, the industry has been stuck in a cycle of stagnation, where only the most established franchises could survive. On mobile, many games failed to meet the metrics required to even reach launch, let alone scale. On PC, a staggering 18,295 games were released on Steam in 2024 - most destined to disappear without a trace.

But now, a different story is emerging. Our research points to a new age where successful new titles are not only possible - they're probable. The conditions are ripe for something extraordinary: more capital, more publishing deals, more fair distribution, lower development costs, and better tooling. It's a heady mix. And while not every developer will seize it, those who do will stand at the forefront of a creative and commercial revival.

At the heart of this era is technology - the ultimate enabler that empowers developers to reimagine what's possible in game creation. Better tech is among us. It's the reason 59% of developers say they feel ready to launch new games in 2025. Once-exclusive AAA tools are now accessible to everyone, so smaller teams can make bigger waves, and larger teams can operate leaner than ever before.

This is a revolution driven by external technology. No longer are studios wasting resources building everything from scratch. Much like the shift from custom engines to Unity, developers are embracing ready-made solutions that they can then extend themselves. In fact, 48% of developers plan to increase their use of external tech in 2025, while only 6% plan to use internal tech only. And it's not hard to see why. External tools are faster to adopt, easier to maintain, and, crucially, more customizable than ever.

For Metaplay, this shift is validation of everything we stand for. Scalable servers, advanced development workflows, superior config management, and next-level LiveOps dashboards aren't just 'tools' to us, they're our masterpieces. Just as Gutenberg's printing press fueled the distribution of knowledge, Metaplay's backend is designed to empower developers to create and scale their masterpieces. Our purpose is to help your games reach more players, scale faster, earn more, and thrive longer.



CONCLUSION

Creativity and Efficiency: Two Sides of the Same Coin

It's impossible to talk about a renaissance without talking about creativity. During the original Renaissance, artists like Leonardo da Vinci didn't just produce 'more' art - they produced better art. The same is true now. Game developers no longer have to be bogged down by servers, technical debt, or clunky infrastructure. Instead, they're channeling that energy into gameplay, story, and player experience.

The message from our conversations with 150 Unity developers was clear: **the right tooling is fundamental to unlocking that crucial next stage of growth.** It's also helping developers to move away from 'ship and forget' launches toward 'ship, refine, and grow' models that are built to scale and evolve with time. Running a game as a LiveOps service is now the new normal, and players have come to expect continuous content drops, seasonal updates, and fresh experiences for years after launch. Of course, tooling needs to keep up with that - and when a studio has a game to make, they don't want to be building that themselves.

The Game Development Renaissance isn't a future vision - it's already here. Studios that embrace the externalized development model can build faster, run leaner, and create better player experiences. Those who cling to the past - internal tech silos, manual workflows, and creaking build pipelines - risk being left behind.

This shift isn't just for big studios. It's for every studio. Small teams that once struggled to compete now have access to the same tools that power the world's most popular live service games. This isn't about evening the playing field. It's about making the field bigger, more accessible, and full of opportunity.

This is an age where developers will build fewer things themselves - but create more than ever before.

Are you ready?



Metaplay

The backend that beats even the best in-house tech.

Game studios across the world trust Metaplay's fully-extensible backend for building, scaling, and operating top-tier live service Unity games:



Metaplay

Purpose-built to beat even the best in-house backend tech, Metaplay is a complete backend solution for building, operating, and scaling top-tier live service games. Metaplay's SDK is the only backend that offers a full suite of customizable and extensible tools which cater to every stage of production of an online game's growth from the first line of code, right through to LiveOps and player support.


Based in Helsinki and founded in 2019, the team comprises veteran game developers and engineers, each highly familiar with the tools needed to support a game as it scales.

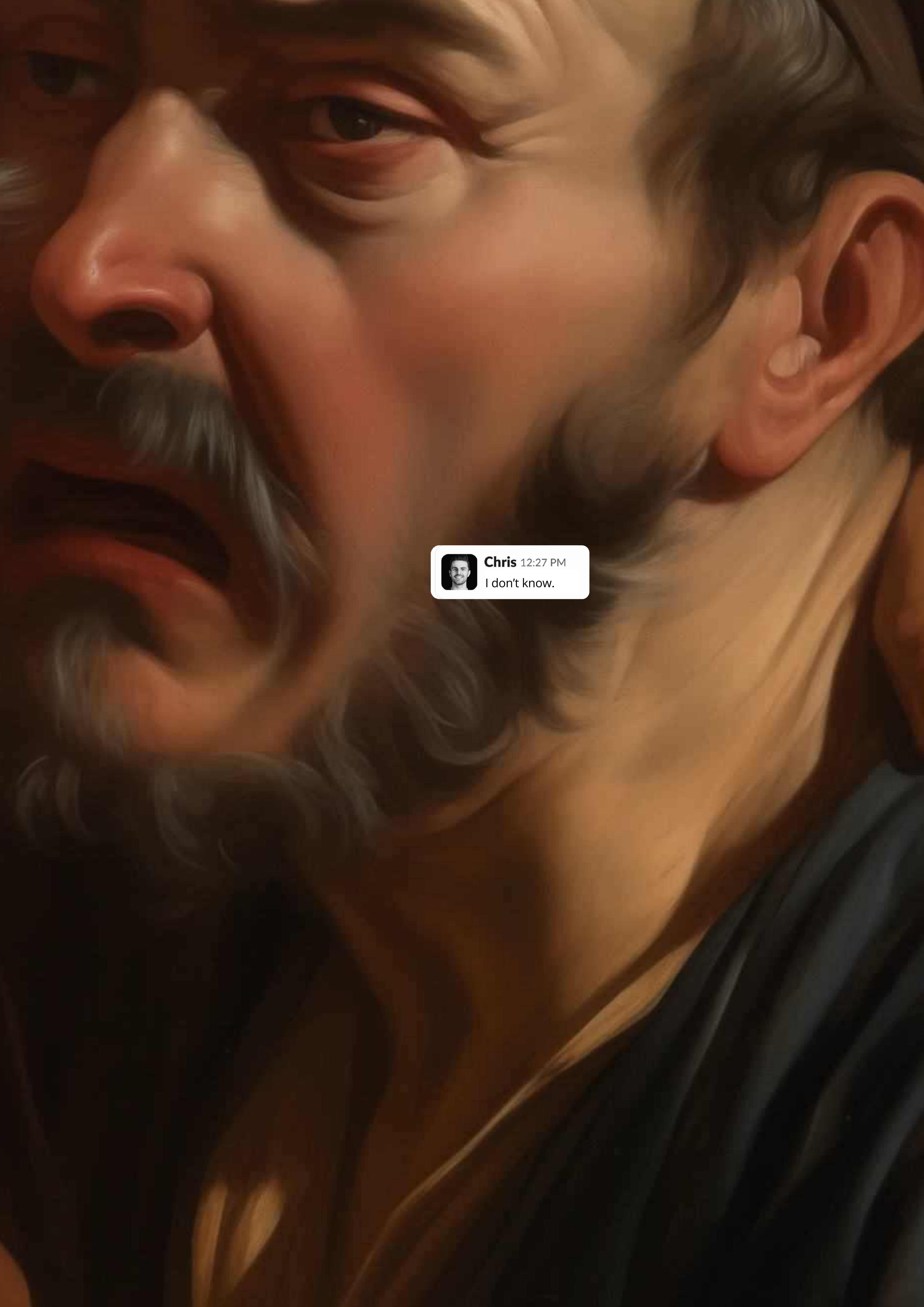
Since its founding in stealth, Metaplay has worked with various Finnish developers including Metacore, Dodreams, and Playsome to create a leading-edge game development platform. In 2024, the backend branched out across Europe and the world, with established studios such as Trailmix and Lessmore trusting their battle-tested tech to support their next wave of projects, as well as many other studios from across the world.

Start making your next game on Metaplay's new managed services, with plans starting from €995/month for pre-launch games and €1985/month for games in full production.





 **Emil** 12:23 PM
Remind me again why we decided to make a 60-page magazine?



Chris 12:27 PM

I don't know.

