aws FOR GAMES

GAMES ON AWS 2026

GS Neotek | MEGAZONE CLOUD

GAMES ON AWS 2026

aws FOR GAMES

The Future of Play

5 Forces Reshaping Games



Shayan Sanyal
Global Games BD Leader



Dyan Williams
Global Games BD Strategy

GS Neotek | MEGAZONE CLOUD



Game Tech customers trust AWS worldwide

Five Forces

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Know your Player, own your Player

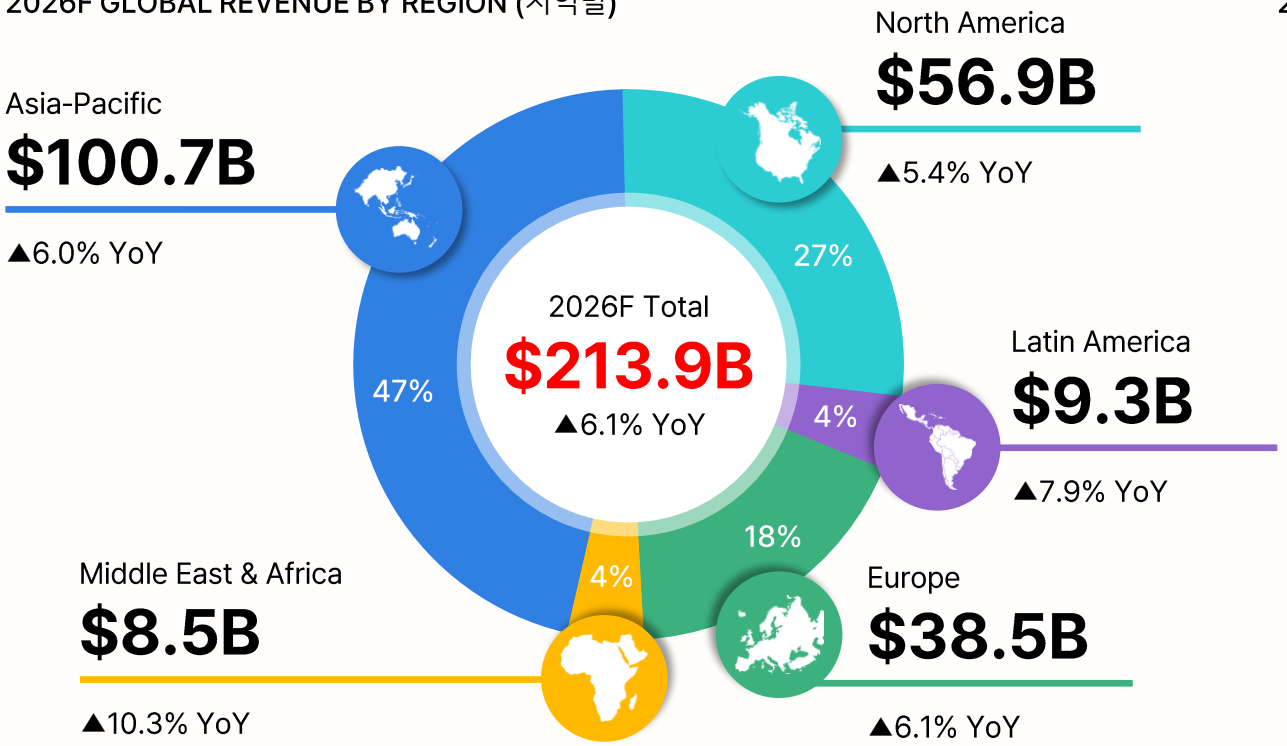
01 효율성으로의 전환

The Efficiency Pivot

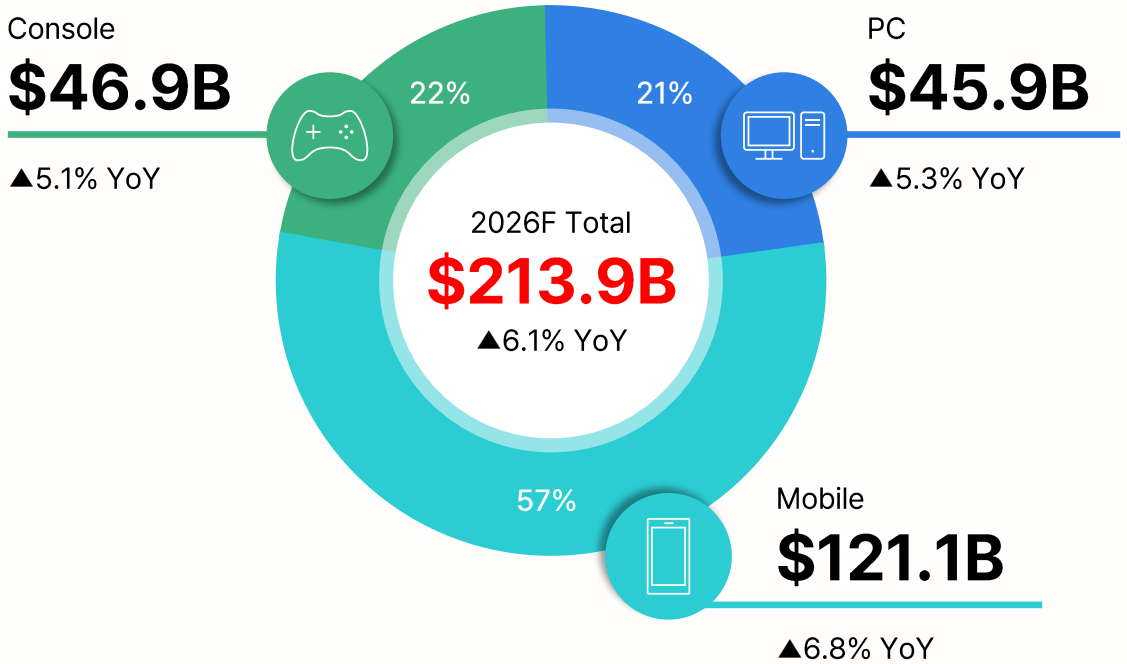
NewZoo Global Games Market Report August 2026

글로벌 게임 산업 매출 현황 Global Industry Revenue

2026F GLOBAL REVENUE BY REGION (지역별)



2026F GLOBAL REVENUE BY PLATFORM (플랫폼별)



Takeaways:

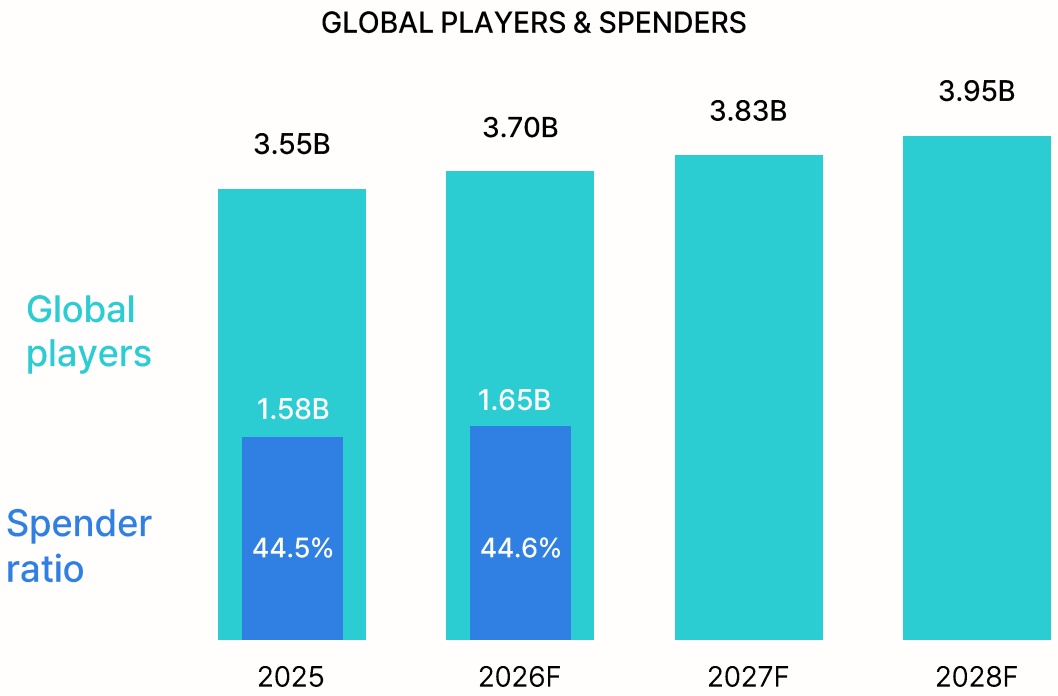
Modest growth in mature markets
Higher % growth in emerging markets but lower absolute revenue
Mobile continues to drive over half revenue

Takeaways:

성숙한 시장은 완만한 성장세
신흥 시장은 성장률은 높지만 절대 매출은 낮음
모바일이 여전히 전체 매출의 절반 이상을 견인

NewZoo Global Games Market Report August 2026

플레이어 & 과금 유저 Players & Spenders



PC players (PC 유저)
977M
26% of total players

Mobile players (모바일 유저)
3.10B
84% of total players

Console players (콘솔 유저)
651M
18% of total players

Takeaways:

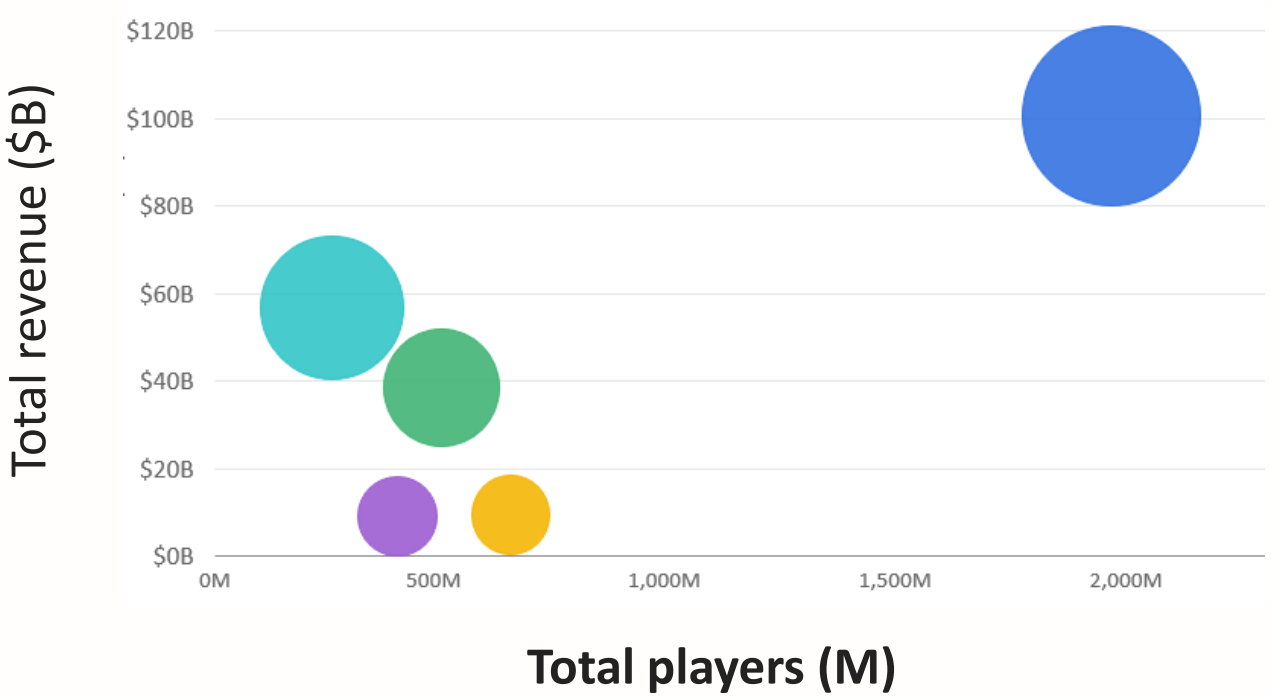
Player base growth slowing
Revenue growth increasingly reliant on spend

Takeaways:

플레이어 기반 성장의 둔화
매출 성장은 점점 더 지출 확대에 의존

NewZoo Global Games Market Report August 2026

플레이어 & 과금 유저 Players & Spenders



	Global	NA	EU	APAC	LATAM	MEA
Total Players	3,700M	251M	475M	1,940M	394M	640M
% of Global Players	100%	7%	13%	52%	11%	17%
YoY growth		1.5%	2.7%	4.0%	4.7%	7.9%
Total Revenue		**56.9**	**38.5**	**100.7**	**9.3**	**8.5**
ARPU (per player)	**$57.8**	**$226.3**	**$81.1**	**$51.9**	**$23.6**	**$13.3**

Takeaways:

Regions convert & spend differently – smaller player base = higher conversion & ARPU

With fewer players you need to convert the ones you have more deeply

Takeaways:

지역별로 다른 전환율과 지출 – 더 작은 플레이어 기반 = 더 높은 전환율 & ARPU

플레이어가 적을수록, 보유한 플레이어의 과금 깊이를 더 끌어올려야 함

Organizational Challenges

57%	Report struggling with growing development/lifecycle cost
50%	Report inability to develop game updates/content as quickly as we or players want.
40%	Report developer burnout
36%	Struggle with player engagement

효율성으로의 전환 The Efficiency Pivot

- Fewer new titles
- Double down on existing games
- Invest in your target players

- AI for efficiency, speed, quality, revenue, and innovation

Real Opportunities For AI Game Development, Publishing, And Player Experiences, Forester, 2025

Note: Showing top six responses Base: 510 global decision-makers at the manager level or above who are video game developers or publishers
Source: A commissioned study conducted by Forrester Consulting on behalf of AWS Marketplace, March 2026

02

AI: 실험에서 에이전트로

AI: From Experiment to Agentic

AI의 진화 AI Evolution

2023

자동 완성
AUTO-COMPLETE

개발자의 코딩 속도 향상 지원

Helping developers write code faster

2024

어시스턴트
ASSISTANTS

대규모 코드 생성 및 질의 응답

Generating larger pieces of code and answering questions

2025

에이전트
AGENTS

인간의 감독하에 개발 작업을 처음부터 끝까지 수행

Completing development tasks end-to-end with human in the loop

2026

자율화
AUTONOMOUS

최소한의 인간 개입으로 소프트웨어 빌드, 배포, 유지 보수 진행

Building, shipping, and maintaining software with minimum human intervention

에이전트 AI의 부상, 부서별 현황 The rise of agentic—by department

Game development planning (개발기획)

69% Using agentic AI for research and insights during concept phase to help validate game design or concept

66% Drafting/prototyping assets (e.g., drafting character models)

55% Improving coordination (e.g., automating project tracking updates, increasing the transferability of work, annotating legacy code)

49% Supporting project management tasks (e.g., drafting project plans, timelines, research

Video game development (게임개발)

73% Using agentic AI to create dynamic NPCs (e.g., personalities, movements

66% Using AI/agentic AI to experiment with adaptive gameplay (e.g., dynamic levels. personalized storytelling)

54% Developing user-generated content (UGC) tools to give our players

53% AI playtesting/QA

Video game publishing* (퍼블리싱)

69% Applying AI-powered automation to optimize marketing campaigns (e.g., ad spend)

64% Delivering targeted marketing and game recommendations by analyzing customer data (e.g., demographics, player behavior)

53% LiveOps automation

45% Player feedback summarization

Customer support (고객지원)

65% Using agentic AI tools to accelerate or automate customer support

59% Predictive support/ automated troubleshooting of technical challenges (e.g., artificial intelligence for IT operations [AIOps])

54% Offering dynamic, personalized in-game purchases based on player behavior (e.g., targeted rewards and incentives)

43% Automating the collection and processing of player sentiment or outcomes across channels

*AWS commissioned Forrester Consulting, March 2026

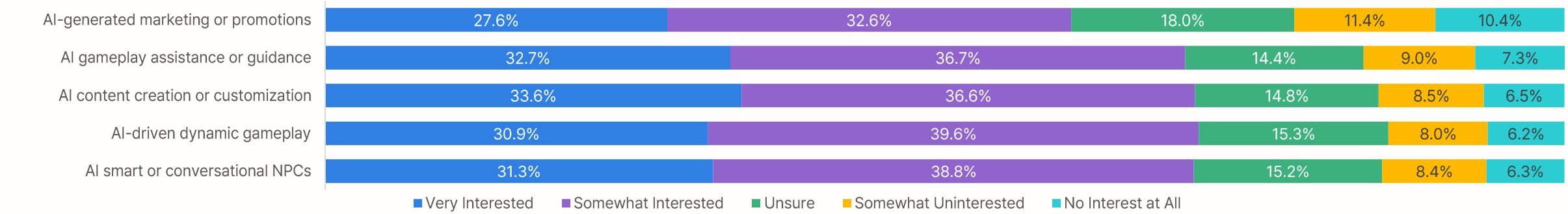
아시아 10개국: 생성형 AI와 플레이어 감성 분석 (APAC)

Asia-10: GenAI—player sentiment APAC

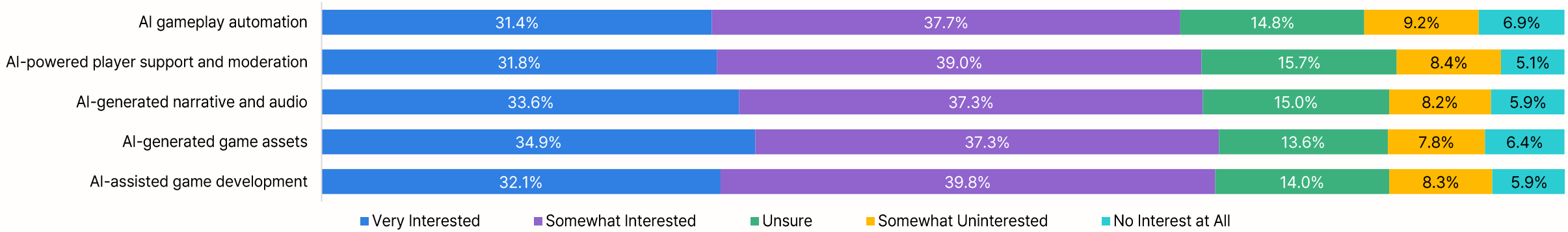
Player opinion is GenAI is highly favorable for in-game usage and for game development

Highest: India, China, Indonesia, Vietnam, Thailand | **High:** Singapore, Malaysia | **Moderate:** Japan, Korea, Philippines

INTEREST IN GENAI USAGE IN GAMES



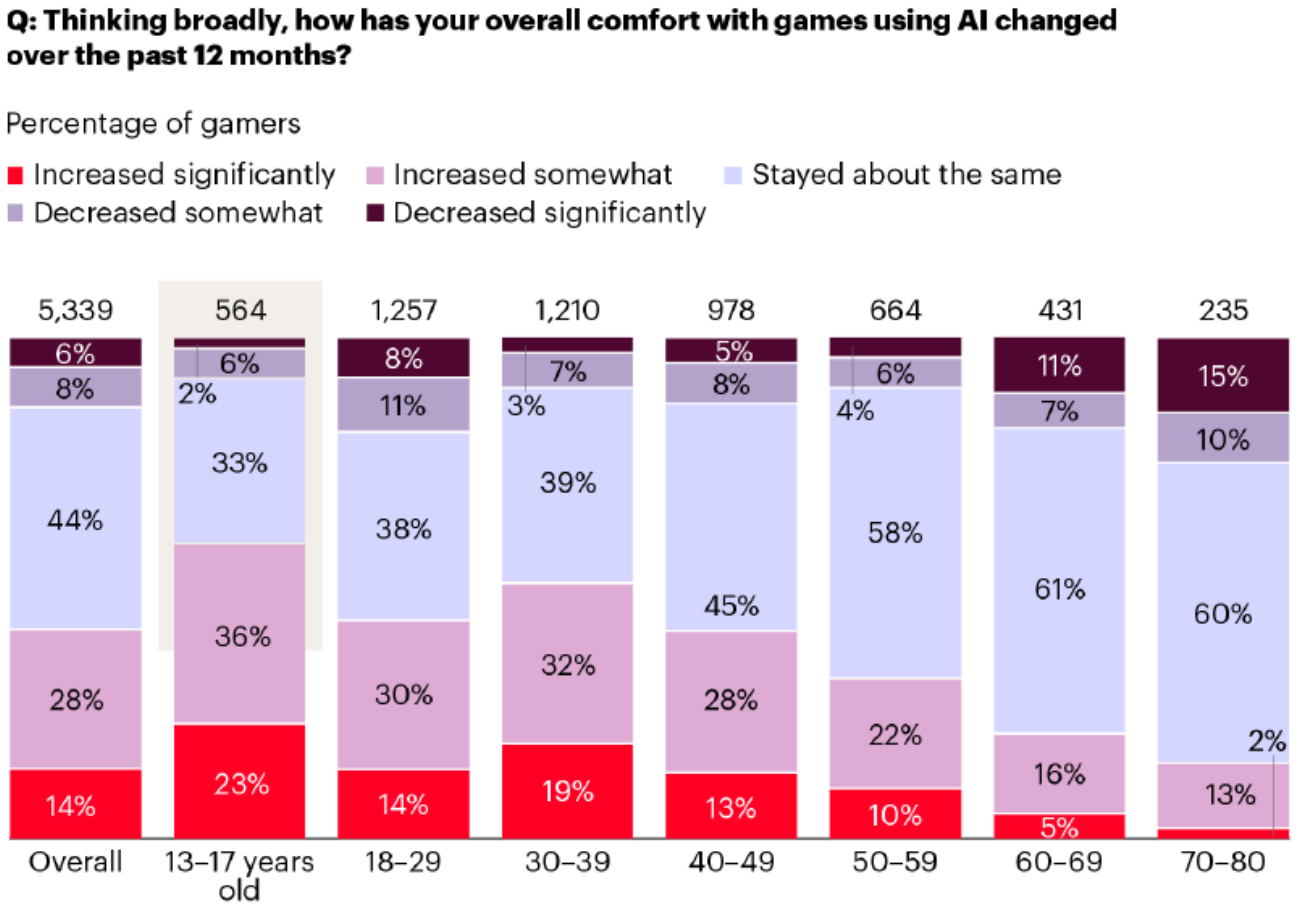
INTEREST IN DEVELOPER USE OF GENAI



Source: Niko Partners 2026, N = 9,340 respondents

한편 서구에서는... Meanwhile in the West...

42% of Western players are more comfortable with AI than a year ago (teens: 59%) — youth cohorts are closing the East–West gap.



Note: Values are rounded
Source: Bain Media Consumption Survey, June 2026 (gamers n=5,339)

Source: Niko Partners 2026, N = 9,340 respondents

AI in Production

Where do I start?

What should I use?

How do I measure ROI?

Challenges:

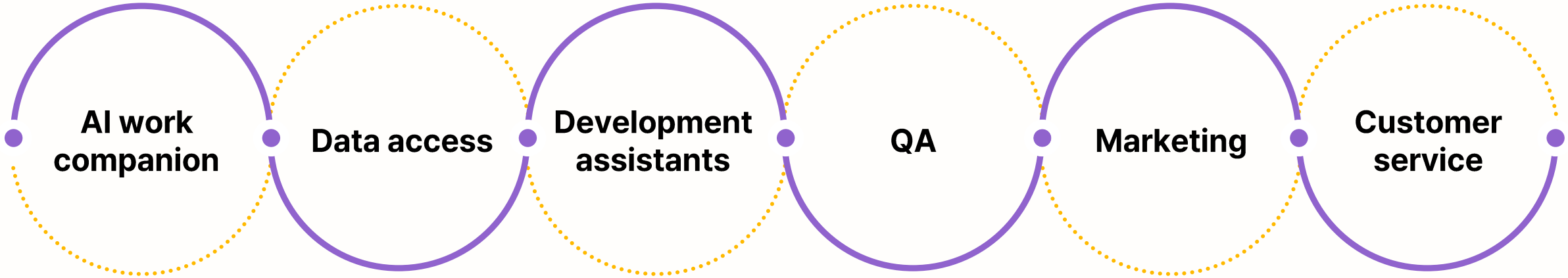
- AI Governance, provenance
- Model churn, tool proliferation
- Tokenomics & ROI uncertainty

GenAI spending at an all-time high: 31% plan to spend more on AI tools

But…

For 72% of games publishers and developers, making Agentic AI useful to the business is difficult

AI ROI 로드맵 AI ROI Roadmap



AI work companion	Data access	Development assistants	QA	Marketing	Customer service
	Decision support for all disciplines	Custom code, art & design pipeline agents	QA automation	Marketing/UA campaign automation	Customer service/ CRM automation
Increase individual efficiency & build AI familiarity	**Faster decisions**	**Derisk production time**	**Derisk production quality**	**Faster deployment & optimization**	**Increase VIP player retention**
	100% automation of select insights	2X recurrent content output increase	7X increase of automated test cases	Up to 50% CTR increase	-40% escalations

AWS for Games 솔루션 영역 AWS for Games Solution Areas

BUILD



Cloud game development



Game content creation

RUN



Game backend & infrastructure

GROW







Player Acquisition, Engagement, Monetization

USE CASES

BUILD		RUN	GROW
Version control & DAM	AI for content production	Game backend as-a-service	Game analytics & player 360
Build & render pipelines	In-game AI experiences	Game and player data backend	Community mgmt. & growth
Virtual workstations	Game asset localization	Game security	Advertising & install growth
Game QA & playtesting		Game infra load testing	Customer relationship mgmt. & campaigns
Code assistance		Game streaming	Marketing asset creation & localization
Team collaboration & productivity		Game Servers	Personalization & experimentation

 Amazon Bedrock

 Amazon SageMaker

 Amazon Trainium

 AWS Inferentia

KIRO

 Amazon Quick

 Amazon Connect

AWS 기반 AI 시작점 AI on AWS starting points



Amazon Quick

AI work companion

- Private
- Connected to your tools
- Integrated BI
- Easy automation
- Deep research
- App creation

KIRO

Agentic IDE & CLI

- Choice of 20+ models
- Agent harnesses
- Task automation
- Fully autonomous task completion
- PC/Mac/Web/Mobile



Amazon Bedrock

Fully Private & Fully Managed Generative AI

- Choice of 100+ models
- Integrate AI agents in your workflows and data
- Guardrails built-in
- Swap models freely



Amazon Connect

AI-powered contact center

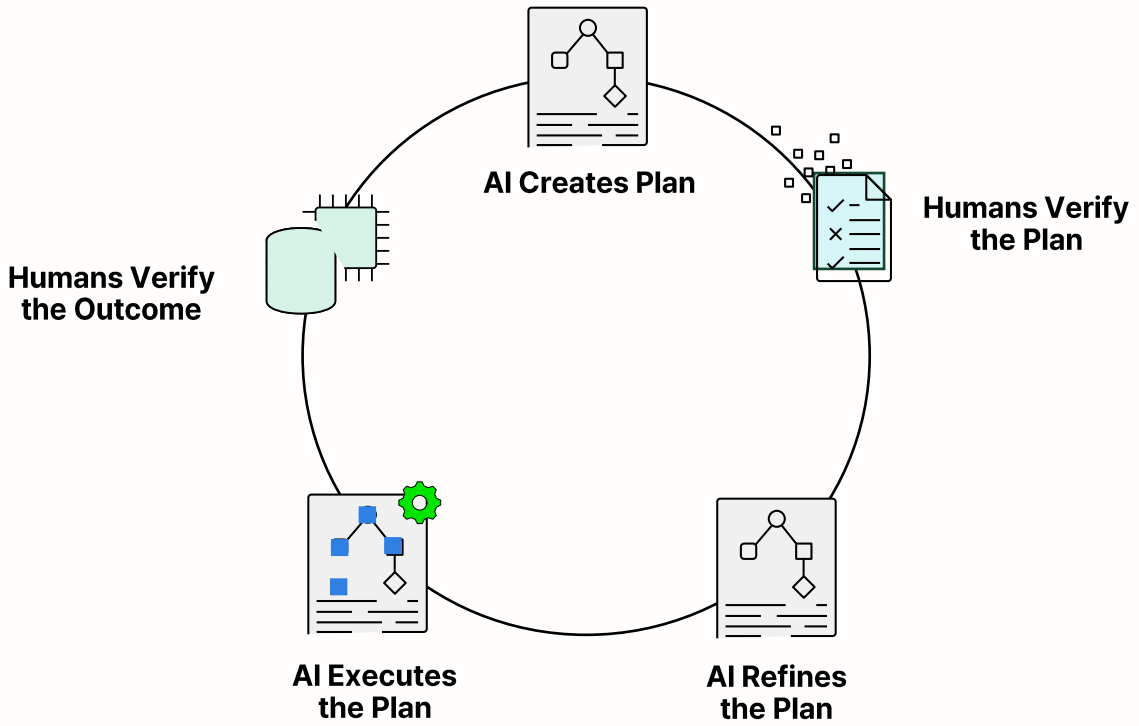
- Proactive, personalized outreach campaigns
- Voice, email, SMS
- Unified customer profiles
- Real-time observability

AI 기반 게임 개발 라이프사이클 (AI-DLC)

AI-Driven Development Lifecycle (AI-DLC)

AI orchestrates the development process with planning, task decomposition, architectural suggestions etc.

Developers retain the ultimate responsibility of validation, decision-making and oversight.



playrix

CHALLENGE

"코드를 작성하는 것이 병목이었습니다. 에이전트가 그 병목을 없애줍니다. 하지만 이제 다른 일이 전면에 등장합니다. 바로 무엇을 만들어야 하는지 정확하게 정의하는 것, 즉 요구사항과 설계를 잡아내는 일 입니다."

"Writing code used to be the bottleneck. Agents take that bottleneck away. But a different job moves to the front: Saying precisely what needs to be built, capturing the requirements and the design."



AI-DLC: Accelerating software delivery with structured AI agent workflows

playrix

SOLUTION

AI-DLC process, with human review throughout:

1. Inception: Agent gathers requirements
2. Construction: Agent creates a detailed design + generation plan
3. Agent executes once approved

RESULTS

- Increased development velocity and iteration cycles.
- More predictable deliveries—variance narrows across team
- Improved code, traceability, and near-zero downstream rework
- Smoother, faster onboarding and handoffs - design docs sit beside code



Cost control and user attribution for Claude code on Amazon Bedrock

CHALLENGE

- Cost management of Claude usage
- Security opposed long-lived API keys & manual onboarding/offboarding
- Direct Anthropic purchase meant another bill to manage

WARGAMING.NET
LET'S BATTLE



Cost control and user attribution for Claude code on Amazon Bedrock

SOLUTION

- IAM Identity Center (corporate SSO)—no new identity system needed
- IAM Principal Attribution in Bedrock
- Permission set with Bedrock only privileges

RESULTS

- Visibility and granularity into AI spend in one bill
- Faster onboarding and offboarding across teams
- No new code, no key inventory to maintain









"정확히 어디에 얼마가 청구됐는지 한눈에 알 수 있습니다. 하루에 100달러 넘게 쓴 사람이 누군지 바로 파악해서 의사결정을 내릴 수 있고, 일주일에 1달러 정도만 쓰는 사람이라면 그것대로 또 괜찮아요. 접근 권한이 여전히 통제되고 있으니까요."

—Renat Lasitsa

Team Lead Capacity & Operations

“You know exactly what got charged. Who spent more than a hundred dollars in a day—you can make decisions. Someone who uses it rarely, a dollar a week—great, access is still under control.”

Zenjoy match-3 game level testing

zenjoy







CHALLENGE

- Balanced progression: Crucial retention, and monetization
- Translating complex Match-3 variables into an AI-trainable environment
- Rapid iteration: Weekly or bi-weekly updates
- Constant updates featuring new items, mechanics, and level structures

Zenjoy match-3 game level testing

zenjoy







SOLUTION

- AWS “Game AI Bot” an automated validation tool for gameplay and level design, powered by RL algorithms or LLMs
- Gameplay AI training: Uses Reinforcement Learning to train bots that simulate real players
- Proven AWS architecture: Including RL environments, state/action definitions, training frameworks, and data structures

RESULTS

20X
Efficiency in level testing

170%
AI Bot training efficiency

200%
GPU cost performance

"체크포인트 파인튜닝을 통해 120개 레벨에서 AI 봇의 클리어율 90%를 달성했습니다. AWS 머신러닝 전문가의 지원을 받아, 이 봇은 높은 범용성을 갖추게 되어 완전히 새로운 레벨 디자인에도 자연스럽게 적응할 수 있게 되었습니다."

—Zang Wei

Head of IT, Zenjoy

"Through checkpoint fine-tuning, we achieved a 90% clear rate for the AI Bot across 120 levels. Supported by AWS machine learning experts, the bot now possesses high generalization capabilities, allowing it to adapt seamlessly to entirely new level designs."

Higher velocity

ROVIO

Season pass background creation went **from 20 days to just 4 days**

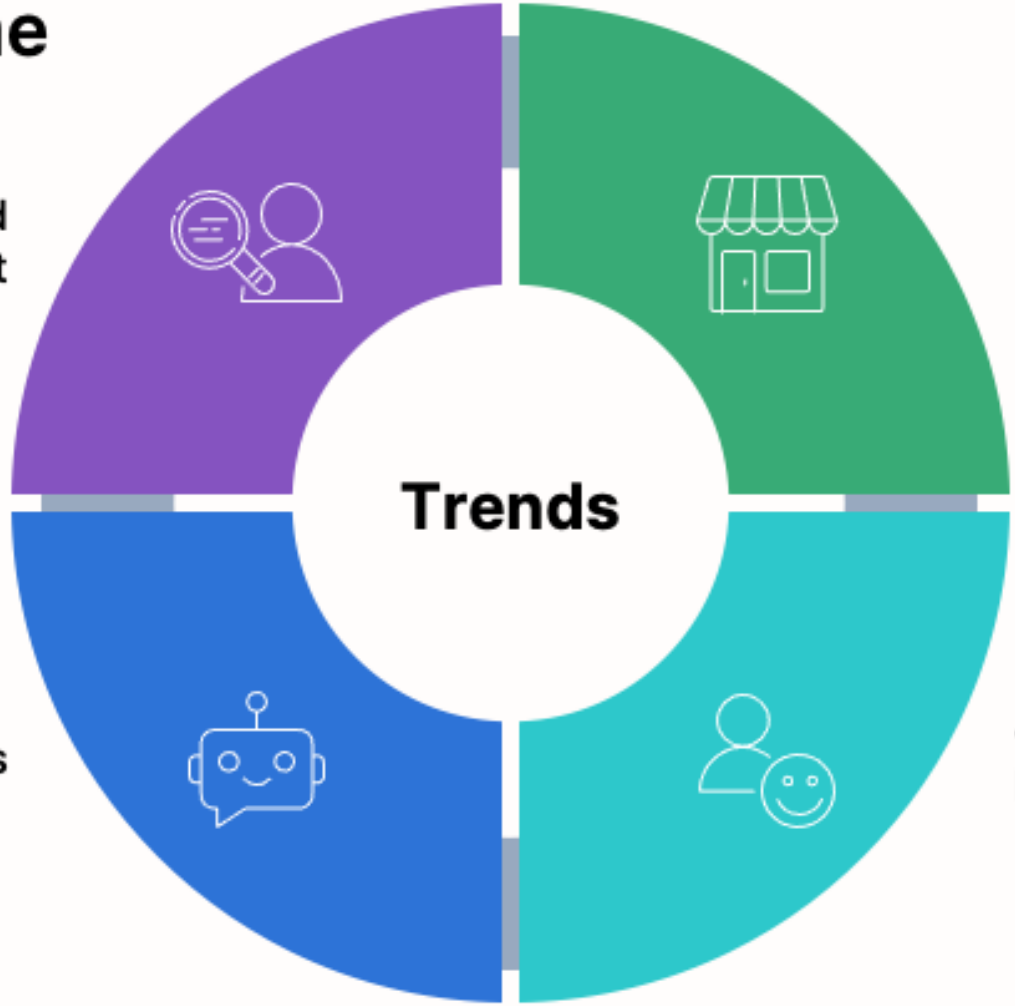
Not just because of AI, but also thanks to better processes



03 게임속의 AI

AI in the Game

AI in the game

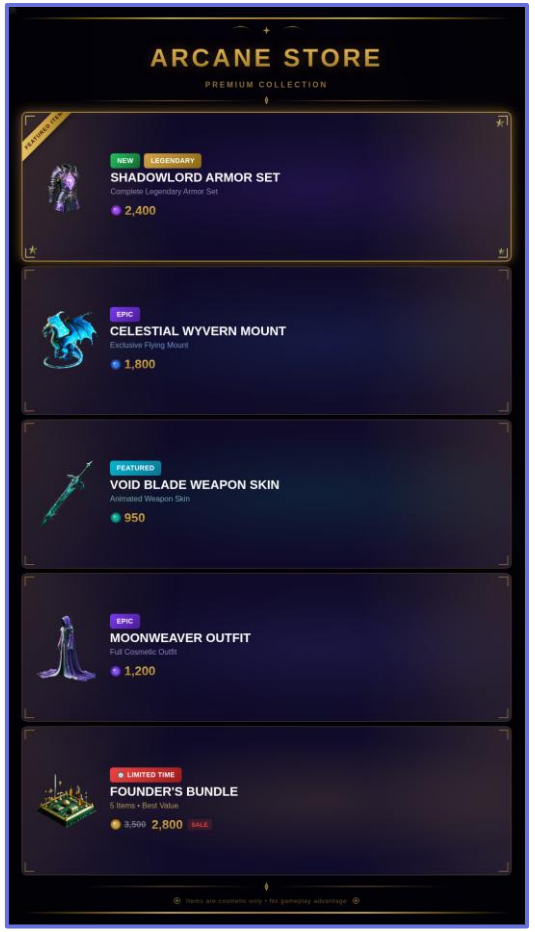




GameLift Recommender (Private Beta 출시 예정)

GAME STORE ML RECOMMENDATIONS

- An autonomous recommendation engine purpose-built for game stores
- New algorithms every 15 minutes, so your in-game store never goes stale
- Every player sees the offers most likely to convert
- Built-in A/B testing framework
- Adapts automatically to seasonal events, content drops, and meta shifts
- Turnkey integration requiring only Store Item ID + User ID



Concurrent user anomaly detection with Bedrock

NEXON

CHALLENGE

- Nexon teams were manually monitoring server metrics and concurrent user counts across 60+ live games
- Each game has unique concurrent user patterns, making single rule-based monitoring ineffective for accurate anomaly detection
- Manual detection caused delayed response—increasing the risk of revenue loss

Concurrent user anomaly detection with Bedrock

NEXON

SOLUTION

Custom AI model used with Bedrock's LLM to auto-generate root-cause analysis reports and a traffic-light system:

- Green = concurrent users maintained
- Yellow = anomaly detected
- Red = decline confirmed





RESULTS

- **100%** anomaly detection rate with zero errors
- Automated detection across all **60** games in **<1 minute**

“AWS와 공동 개발한 AI 모델을 통해, 메이플스토리, 던전앤파이터등 60여개에 달하는 넥슨의 모든 게임에서 1분 안에 이상 징후를 탐지 가능하게 되었습니다.

— Yoonmin Nam

Game Tech, Nexon

“Through the AI model co-developed with AWS, it has become possible to detect anomalies within one minute across all of Nexon's roughly 60 games, including MapleStory and Dungeon & Fighter.”

Artificial Agency powers real-time AI NPCs on AWS

CHALLENGE

- NPCs limited to scripted behavior
- Frontier LLMs too big, slow, costly to run live
- Tight latency + long sessions on maxed out hardware

SOLUTION

An NPC behavior engine, fine-tuned Meta Llama on AWS:

- Amazon SageMaker + EC2 for training and iteration
- Supervised fine-tuning + GRPO to eliminate looping
- In-engine tools for Unity, Unreal
- Cloud platform managing agent state, memory & character evolution



a·\ Artificial Agency

Artificial Agency powers real-time AI NPCs on AWS

RESULTS

- **78.7% to ~ 1%** parse error rate
- **6% → 51%** scenario pass rate
- **~50%** fewer looping behaviors
- **1B model** ≈ 70B baseline – **70x smaller**
- Runs on consumer hardware (on-device)

Owlchemy Labs



Artificial Agency

"게임 스튜디오들은 플레이어에게 자연스럽게 느껴지는 방식으로 AI를 게임 플레이에 도입하고 싶어합니다. 하지만 그렇다고 머신러닝 전문가가 되고 싶은건 아니예요. 저희가 만들고 있는 것은, 개발자들이 그 복잡한 것들을 직접 관리하지 않고도 지능형 캐릭터를 만들 수 있는 방법인거죠."

— Alex Kearney

Co-Founder & Head of ML, Artificial Agency

"Game studios want to bring AI into gameplay in a way that feels natural to players, but they don't want to become machine learning experts to do it. What we're building is a way for developers to create intelligent characters without managing all that complexity themselves."

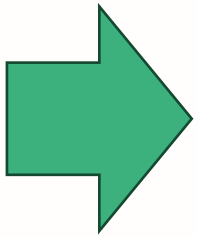
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발견과 재 참여의 진화

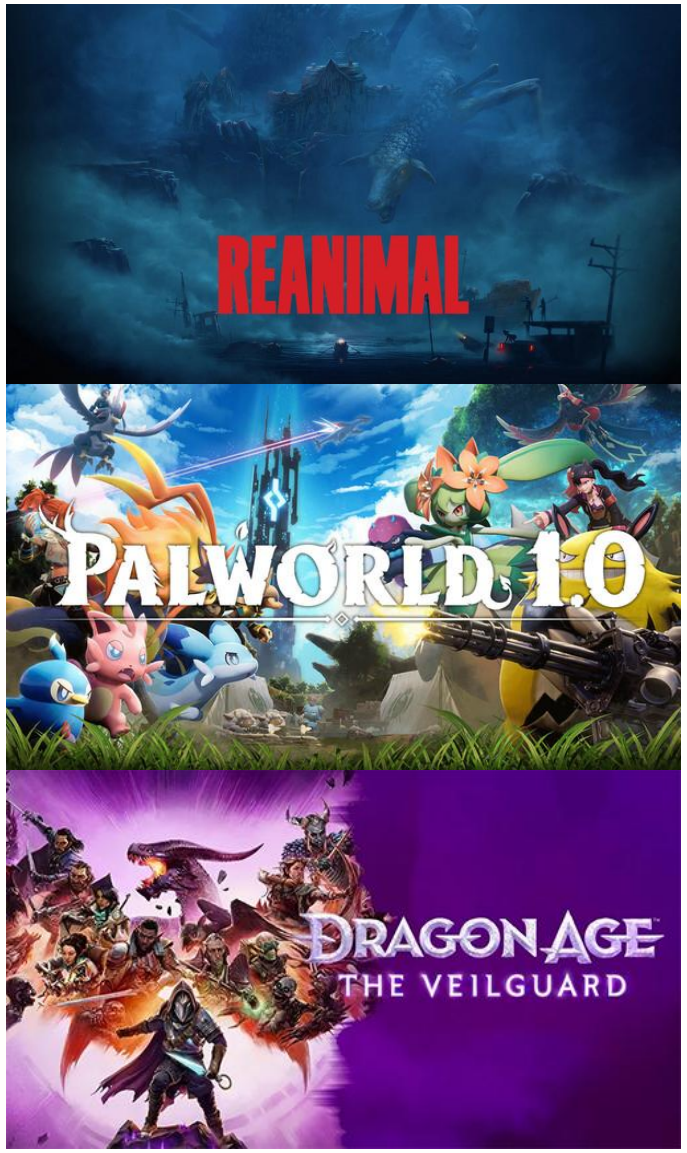
Evolution of Discoverability and Re-engagement

Evolution of Discoverability and re-engagement

- **10k+ titles** launch every year
- Games compete with **social** and shortform content
- Player acquisition costs up **+60%** in last 5 years



- **Players** as **creators** and **distributors** extending content and game lifespan
- **Social sharing** drives organic discovery
- **Community** as moat



GameLift Streams Instant Play Demos

(Private Beta)

- Full-fidelity playable demos of **your real game**
- **No download,** no install, no account, any device, any browser
- **One click** from ad to gameplay with “Buy Now” path after play
- Run on anywhere including **Twitch, amazon.com, and Discord**

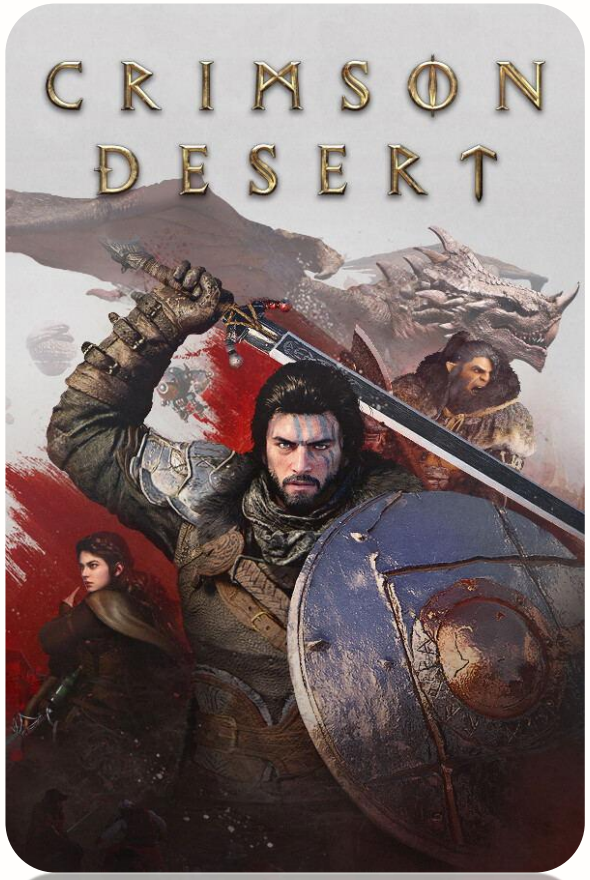
twitch Discord amazon

Pearl Abyss boosts Crimson Desert discoverability with Amazon GameLift Streams Instant Play Demos

PEARL ABYSS

CHALLENGE

- Expand audience for Crimson Desert
- Give players the ability to try before they buy
- Large game size (**150GB**)
- Low latency gameplay experience non-negotiable



Youtube source: @MarkyMark-e8h

Pearl Abyss boosts Crimson Desert discoverability with Amazon GameLift Streams Instant Play Demos

PEARL ABYSS

SOLUTION

- Amazon GameLift Streams to deploy and stream full game build
- Builds running within **2 days**
- **~1 month** from initial discovery to live demo

RESULTS

- A full-fidelity, **zero-download** playable game released on Twitch
- Quick-start streaming to start play in **<1 second**
- **Significant traffic driver** to digital storefronts and purchase intent
- Reached players **lacking the hardware** capable of running the game

What gamers are saying about Playable Demos

BattlefrontFR @SWBFNewsFR · Aug 31
Oh wow, that's so cool, what the hell 🤯!
1 5

Concerned_Citizen™ @Concern_c1tizen ·
Commentary account
What type of witchery is this!

Fuyushiro @felipetyphon · Aug 31
this is insane, glad i got to try out this amazing game for a few mins
76

Caleb Enyawbruce ⚜️ @enyawbruce ·
That's awesome!! 👏👏

GamersPrey @Game

Lu1z @real_lu1z · Aug 31
Amazing I'm from Brazil, and the latency is very stable.
5.8K

Matheus Lima @mafhper · Aug 31
Wow

Will ☕ @Sir_Charm · Aug 31
yo that is so cool
1

Aric Holmes @TheFiggyPudding · Aug 31
That's sick

@leojuriolli7 · Aug 31
s on the fence about buying it. played it and was convinced!
3 282

Aug 31
@WillJPowers That's an amazing tech, I already had the game, but I test. That's the future of the gaming.
1 102

t's why Pearl Abyss are the GOATS.
3.3K

Bucky | Palwo
Insane tech

IRIS @irisgamer774 · Aug 31
The best way to experience a game is to play it yourself even if it's only for twenty minutes

SirBeetWix @SirBeetWix · Sep 2
More games need to do this!

Bak @ig4bak · Aug 31
awesome idea making it playable like that

Abranam @Abranam14197 · Aug 31
what kind of sorcery is this?!?!??!
1 755

Kran @kran27_ · Aug 31
excellent use case for cloud gaming tech! very cool to see :)
2 164

Lucky Salam
DUDE, THAT'

Ebontis @Ebontis · Aug 31
Damnnnn. Now that's how you let people try it. Great work to the team.

"반응은 놀라움과 감탄 그 자체였습니다. 많은 분들이 그 경험에 깊은 인상을 받았고, 강력한 제품이 있을 때 그것이 곧 구매 의향으로 이어진다는 것을 확인했습니다.

—Will Powers

Director of Marketing & PR, Pearl Abys

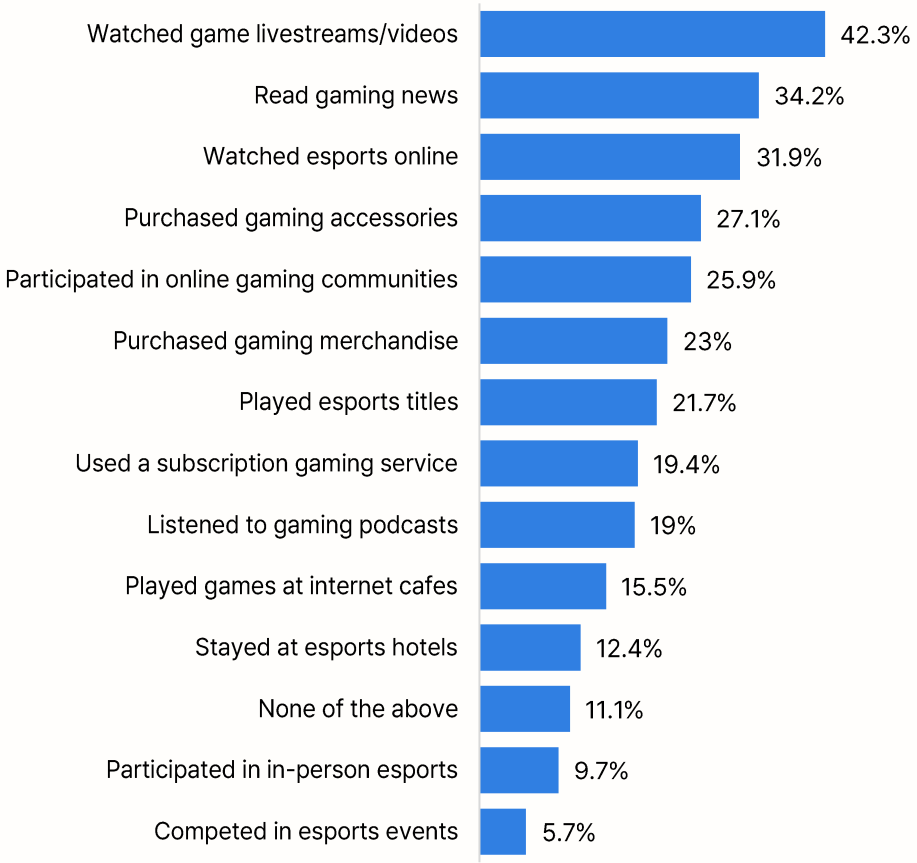
"The response was one of surprise and delight," Powers concluded. "A lot of people were really wowed by the experience, and when you have a strong product, that drives purchase intent."

05 플레이어를 이해하고, 확보하라

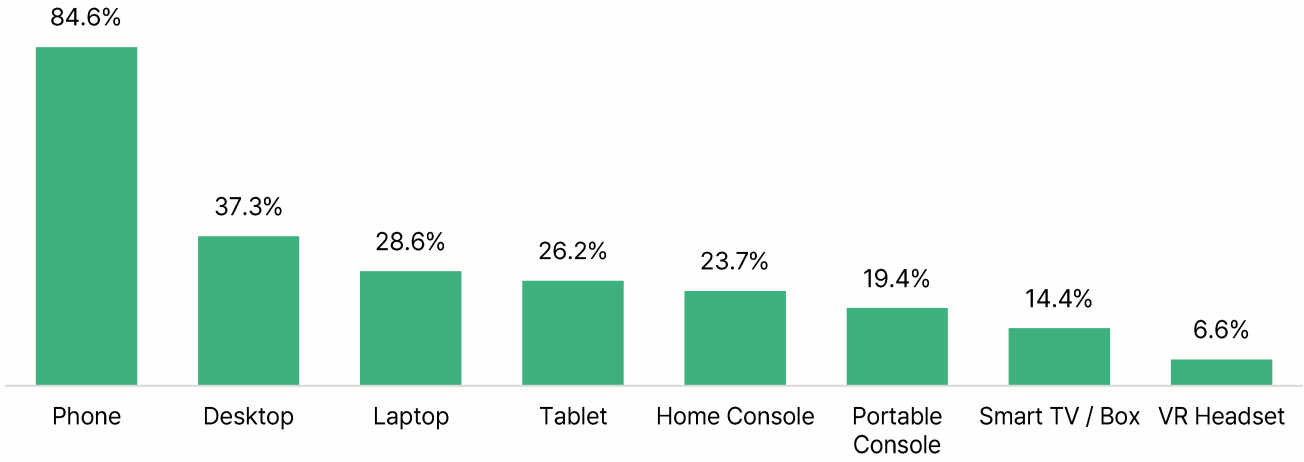
Know Your Player, Own Your Player

Players engage across multiple touchpoints (Asia-10)

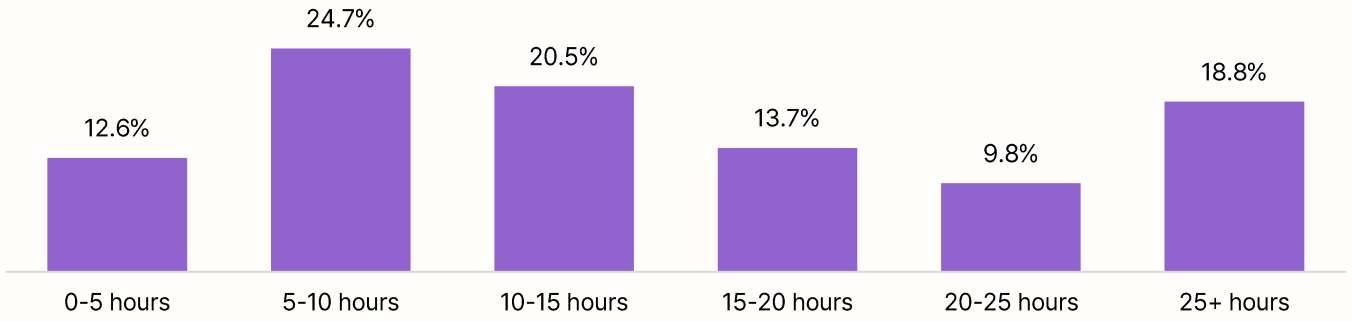
ACTIVITIES (PAST 3 MONTHS)



DEVICES USED TO PLAY VIDEO GAMES (PAST 30 DAYS)

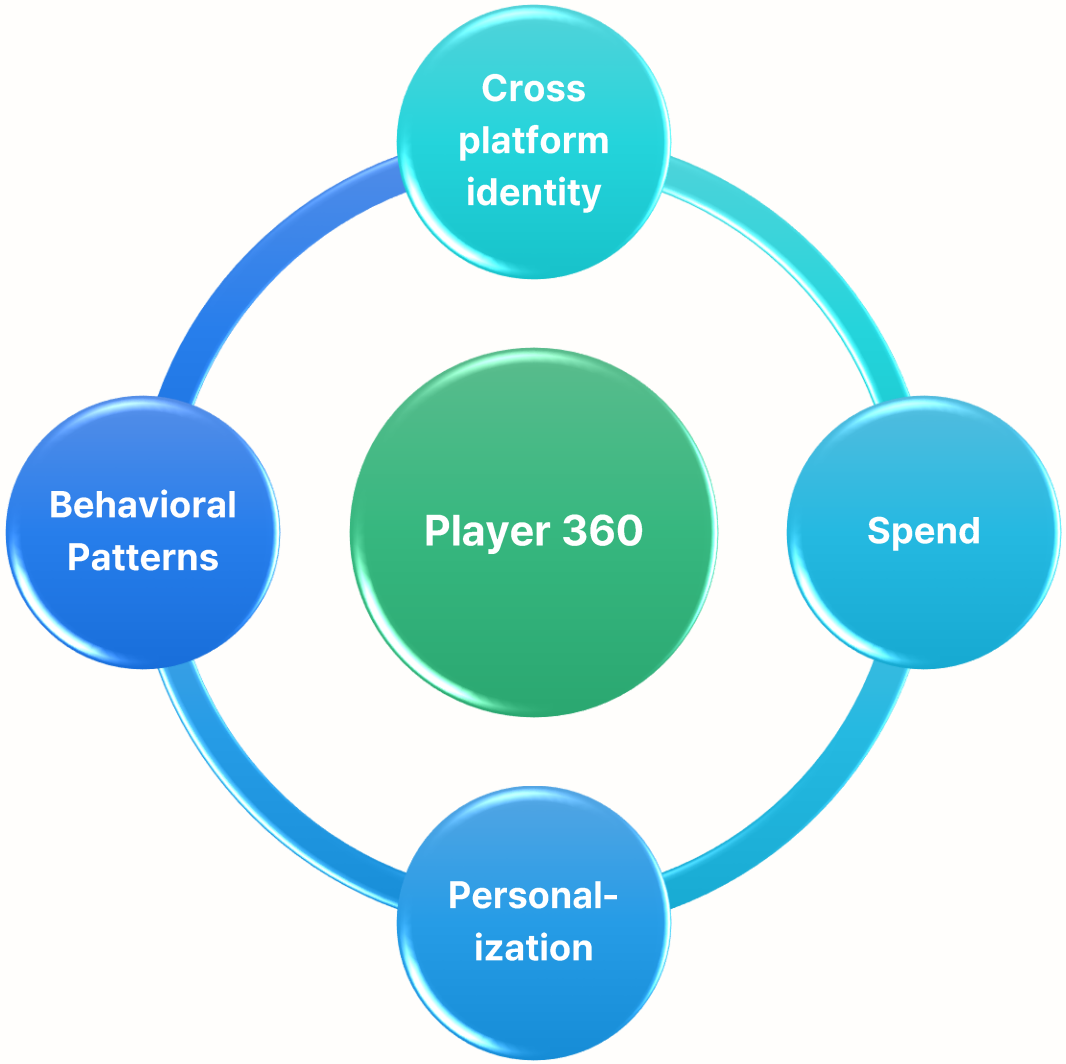


WEEKLY PLAYTIME (RANGE)



Source: Niko Partners 2026. N = 9,340 respondents

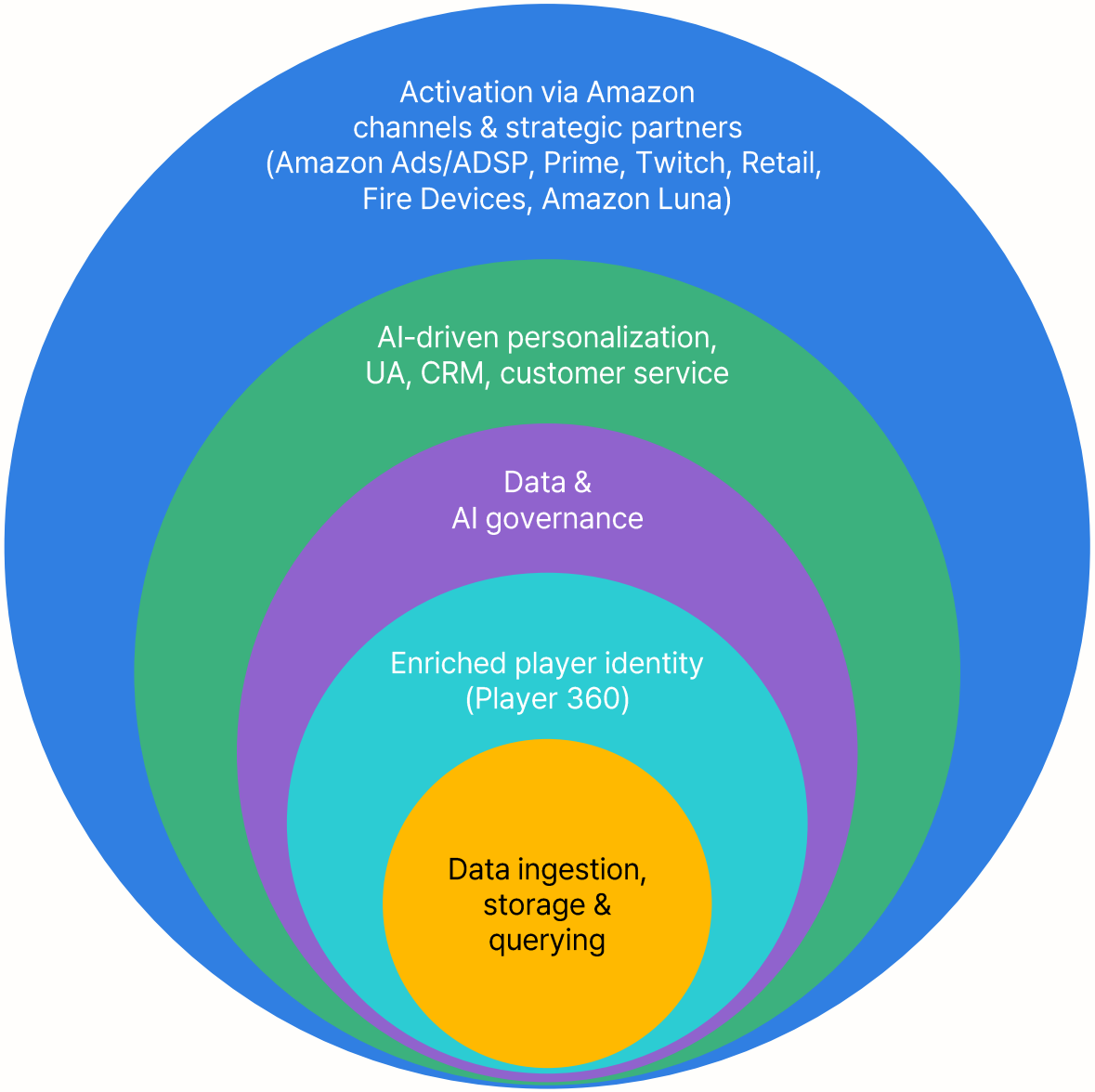
Own your player



Cross-platform identity	Single player profile spanning mobile, PC, console, web—breaking data silos
Behavioral intelligence	Real-time signals: session patterns, spend propensity, churn risk, engagement loops
Personalization	AI-driven offers, re-engagement triggers, lapsed-player win-back at individual level
Lifetime value optimization	From CAC to LTV: Data-informed decisions across the full player journey

AWS for Game Analytics and Player 360

- Composable data, ML & AI services and, solutions to grow capability without migrations
- Proven privacy, security, and resilience
- Pan-Amazon & Partner activation channels
- Governance at all layers
- Interoperability with Game Server and Game Backend Services & partners in a holistic game stack



Player insights with Amazon Bedrock and Amazon Bedrock AgentCore

Mattel Game Studios

CHALLENGE

- Mattel Game Studios needed to collect player feedback across multiple touch points
- Manual collection and analysis time consuming & inconsistent
- Costly multilingual coordination across 14 languages
- Insights delivered too late to act on



Player insights with Amazon Bedrock and Amazon Bedrock AgentCore

Mattel Game Studios

SOLUTION

- MARP (Multi-Agent Report Platform) on Amazon Bedrock AgentCore with Strands Agents SDK
- AI agents collect data, parse multilingual feedback, classify sentiment analysis, extract player quotes

RESULTS

- Report generation reduced from **weeks to minutes**
- **Consistent** analysis quality via unified AI templates
- Native **14-language** support, no manual translation



"리서치팀이 기존에 2-3주가 걸리던 실무 분석을, 이제는 데이터 제출 후 몇 분 만에 예비 보고서를 받아볼 수 있게 되었습니다."

—Mattel UX Research Team

"Survey analysis that previously took the research team two to three weeks can now yield preliminary reports within minutes of data submission."

GAMES ON AWS 2026

aws FOR GAMES

"2027년을 이끌 게임 스튜디오는 데이터 중심, AI 강화, 그리고 플레이어에 대한 집착으로 무장한 스튜디오 입니다."

Studios winning in 2027 are data-driven, AI-augmented, and player obsessed.

01 효율성으로의 전환
The Efficiency Pivot

02 AI: 실험에서 에이전트로
AI: From Experiment to Agentic

03 게임속의 AI
AI inside the game

04 발견과 재 참여의 진화
Evolution of discoverability and re-engagement

05 플레이어를 이해하고, 확보하라
Know your Player, own your Player

GS Neotek | MEGAZONE CLOUD

"함께 다음 게임의 미래를 만들어 가시죠!"

Let's build what's next together!