

Modernizing game
development:
How studios can deliver
scalability, agility,
and growth



Commissioned by:



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Summary

The global video games industry is entering a period of transition. Once defined by explosive growth, the market is now facing a period of much more limited expansion and increasing scrutiny over operations and efficiency. Studios and publishers must deliver high-quality content while managing rising costs, dispersed teams, and changing market dynamics.

In collaboration with Omdia, Workday surveyed 155 senior decision-makers across the video games industry in early 2025. The findings underscore a widespread need for operational modernization. Many companies are attempting to grow while relying on outdated systems and fragmented processes, an approach that is increasingly unsustainable in a highly competitive landscape.

This white paper provides a comprehensive look at the structural pressures and operational roadblocks affecting the industry. Drawing on the survey data, it explores where studios are encountering cost inefficiencies, barriers to scalability, and talent management gaps. It also outlines the technologies and strategic shifts required to build more agile, data-driven organizations that are equipped for long-term success.

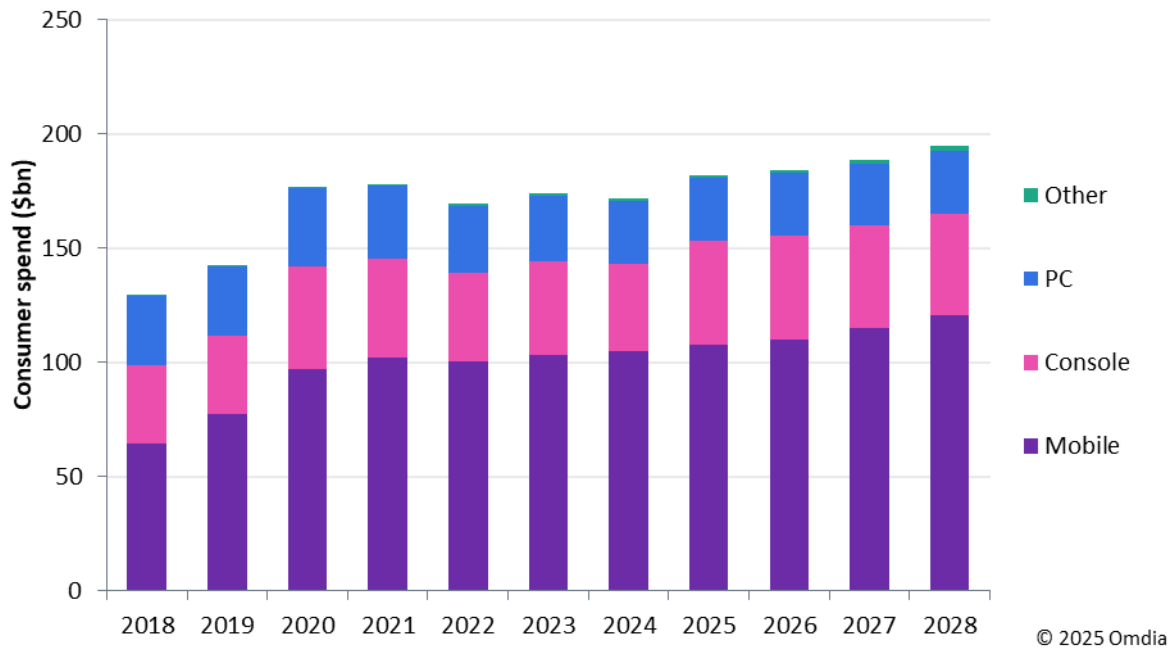
A creative industry at an inflection point

The video games industry has grown into one of the most influential and lucrative segments of the global media and entertainment market. With revenue exceeding \$200bn annually, what began as a niche form of entertainment has evolved into a dominant, multidimensional industry encompassing mobile, PC, console, and live service games.

However, with this growth has come new challenges. Studios that rapidly scaled during the last decade—especially during the pandemic—are now finding that legacy systems, siloed workflows, and underdeveloped business functions are limiting their ability to respond to market changes. The operational structures that supported expansion during boom years are no longer suited to the demands of a maturing industry.

Figure 1: Games market growth rates have slowed significantly in recent years

Consumer spend on games & services, by device group, global, 2018–28, \$bn



Source: Omdia

Workday and Omdia surveyed 155 senior decision-makers from leading studios, publishers, and platforms across the US, UK, Germany, France, and the Nordics. Their responses reflect both optimism and concern. While most believe in the long-term potential of the industry, many acknowledge that internal operations have not kept pace with creative ambition. As games become more complex, player expectations increase, and monetization models shift, studios must be able to scale efficiently, respond to volatility, and plan for the future. That requires more than creative talent: it demands the modernization of business operations, including finance, human resources, planning, and analytics. This paper explores these challenges in detail and provides a roadmap for transformation.

Industry growth and operational pressure points

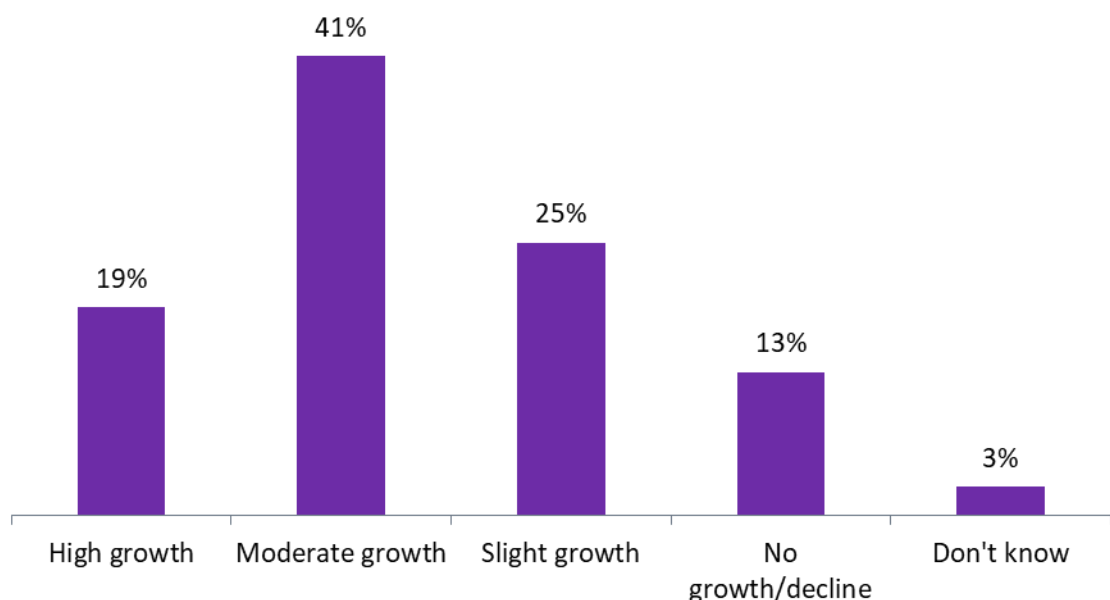
The games industry saw a surge in growth between 2010 and 2020. Rapid adoption of smartphones, high-speed internet, and digital storefronts created a fertile environment for new titles, studios, and monetization models. The COVID-19 pandemic temporarily accelerated this trajectory further, with record engagement across all platforms. However, this period of rapid growth masked operational inefficiencies. Many studios expanded without fully building out back-office functions. Now, as the pace of growth moderates (see **Figure 1**) and competition intensifies, those inefficiencies are becoming more costly.

Only 19% of companies have experienced high growth in the last five years.

As development costs have increased, growth rates have not necessarily followed. Our survey found that just 19% of companies have experienced high growth rates in the last five years, and 13% have seen no or negative growth (see **Figure 2**). These issues are exacerbated by the increasing complexity of modern game production. AAA titles now take years to develop, involve hundreds of contributors, and must be continuously updated post-launch. Studios are managing global teams, working with external partners, and engaging players through live service models. All of these activities require sophisticated operational coordination.

Figure 2: Fewer than a fifth of companies have experienced high growth in recent years

Which best describes your company's growth over the last five years?



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Source: Omdia, Workday

Many studios are shifting toward live service games, which predominantly generate revenue through ongoing monetization streams such as in-game purchases, battle passes, subscriptions, and in-game advertising. While these models have the potential to be highly profitable, they also introduce new operational requirements. Frequent content updates demand agile planning cycles. Live operations

teams need real-time data to adjust gameplay and balance. Marketing and support functions must collaborate closely with development to ensure a coordinated rollout of new content and features. Without integrated systems, this coordination becomes difficult. Studios that lack visibility across teams and functions struggle to deliver updates efficiently, manage costs, or respond to player behavior in a timely manner.

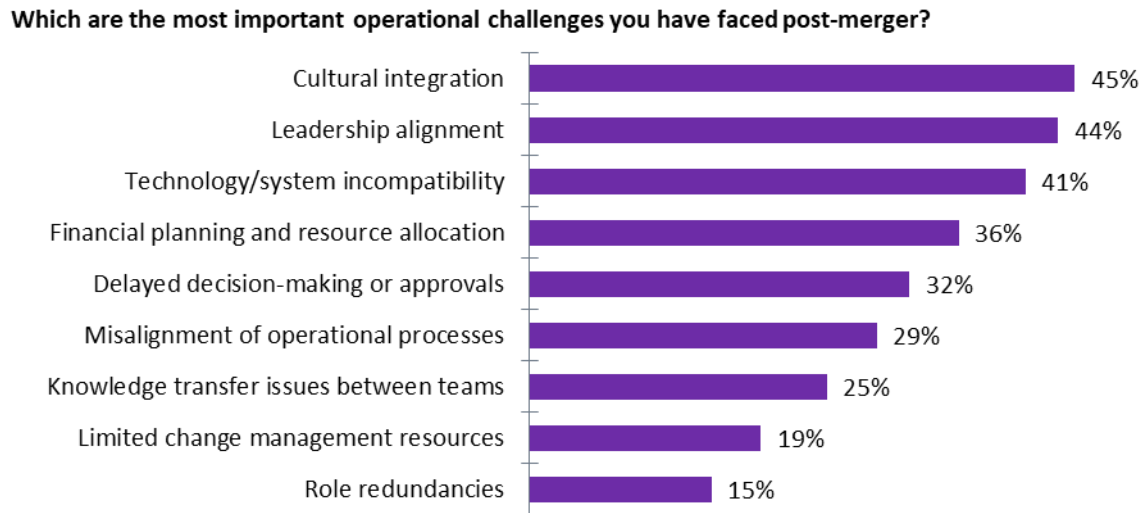
The survey findings suggest that business operations—finance, planning, and HR—have received less investment than creative and technical functions. Many respondents describe their internal tools as outdated or fragmented. Studios often rely on spreadsheets for planning and budgeting. Integration between HR, finance, and development tools is frequently missing, resulting in manual data reconciliation across departments. These issues hinder strategic decisions, which are often made with incomplete or outdated information. The impact is broad, affecting everything from hiring and project funding to M&A integration and global expansion planning.

Scalability and growth constraints

A third of survey respondents say their organizations struggle to scale due to technology limitations. This is particularly evident among mid-sized studios that have outgrown their initial tools but have yet to fully invest in enterprise platforms. These scalability challenges manifest in several ways. Studios report difficulties supporting multi-studio collaboration and managing global headcount and payroll. They also cite a lack of standardization across projects and teams, which makes coordination more complex and time-consuming. For studios operating in multiple countries, the challenges multiply. These organizations must navigate compliance with local labor laws, manage currency conversion, and handle cross-border taxation. Without integrated systems, managing these functions becomes resource-intensive and prone to error.

41% of recently acquired or merged companies cited system incompatibility as a major issue.

Figure 3: Post-merger integrations raise a host of challenges



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Source: Omdia, Workday

Mergers and acquisitions continue to shape the industry, with large publishers acquiring smaller studios to expand intellectual property portfolios or enter new markets. However, M&A activity often introduces operational risk. According to the survey, 41% of companies involved in recent acquisitions experienced challenges of system incompatibility, and 36% experienced challenges relating to financial planning and resource allocation (see **Figure 3**). Cultural and process misalignment was another common issue, slowing the realization of expected synergies. Successful integration requires not only technology alignment but also a shared operational model. Studios with standardized systems and centralized data platforms are better positioned to absorb new teams and assets without disruption.

Scalability is not just about adding headcount or expanding output; it's about enabling coordination across teams and functions. Yet many studios lack the tools to achieve this. Disparate systems lead to misalignment between finance and production schedules. Studios find it difficult to forecast costs across multiple projects and often have limited insight into resource allocation and utilization. This lack of visibility hampers effective decision-making. A studio may overspend on one project while under-resourcing another simply because the necessary data to guide adjustments is not available or trusted. Improving scalability requires a foundation of integrated tools and shared data.

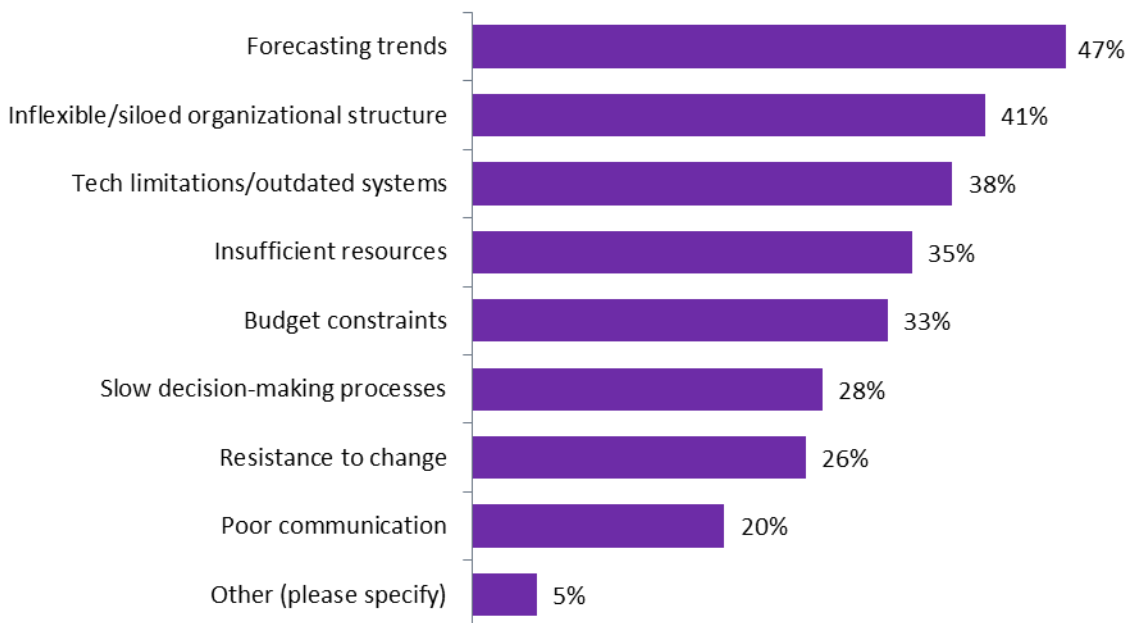
A third of organizations cite technology limitations as a key barrier to scaling.

Agility in the face of volatility

As the market becomes more volatile, the ability to make fast, informed decisions is increasingly vital. Studios are navigating fluctuating player behavior, shifting platform economics, regional market differences, and disruptive technology trends. Many organizations struggle to adjust course when their planning cycles are rigid or their data is siloed. The survey reveals that more than 40% of decision-makers cite inflexible systems as a key obstacle to reacting effectively to changing conditions (see **Figure 4**).

Figure 4: Forecasting trends and inflexible structures hamper studios' ability to adapt to market demands

What challenges do you most often face when adapting to new market demands?



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Source: Omdia, Workday

Business agility in this context means the ability to forecast accurately, reallocate resources quickly, and make operational changes without major disruptions. Studios with unified platforms that integrate finance, HR, and planning functions are better equipped to manage uncertainty. They can more easily model different scenarios, adjust headcount plans, or redirect investment toward higher-performing projects. When decision-makers have access to real-time data, they can assess project health, cash flow, and hiring needs with greater confidence. Without this visibility, teams rely on outdated information and are slower to respond. It's no surprise, then, that access to real-time data is the improvement most frequently cited by respondents as needed to improve operational agility.

The importance of agility extends to talent strategy. Despite large numbers of layoffs in recent years, the games industry remains highly competitive for top talent, especially for senior roles in disciplines such as game design and engineering. This means that studios often must compete not only on salary but also on employee experience. Agility in HR means being able to adjust compensation plans, performance frameworks, and benefits offerings based on current conditions. It also includes onboarding, internal mobility, and workforce planning. Yet many studios operate with HR tools that are disconnected from broader business systems. As a result, they miss opportunities to align people strategy with production and financial goals. An agile HR function requires visibility into workforce data, integration with project planning, and tools that support dynamic staffing models.

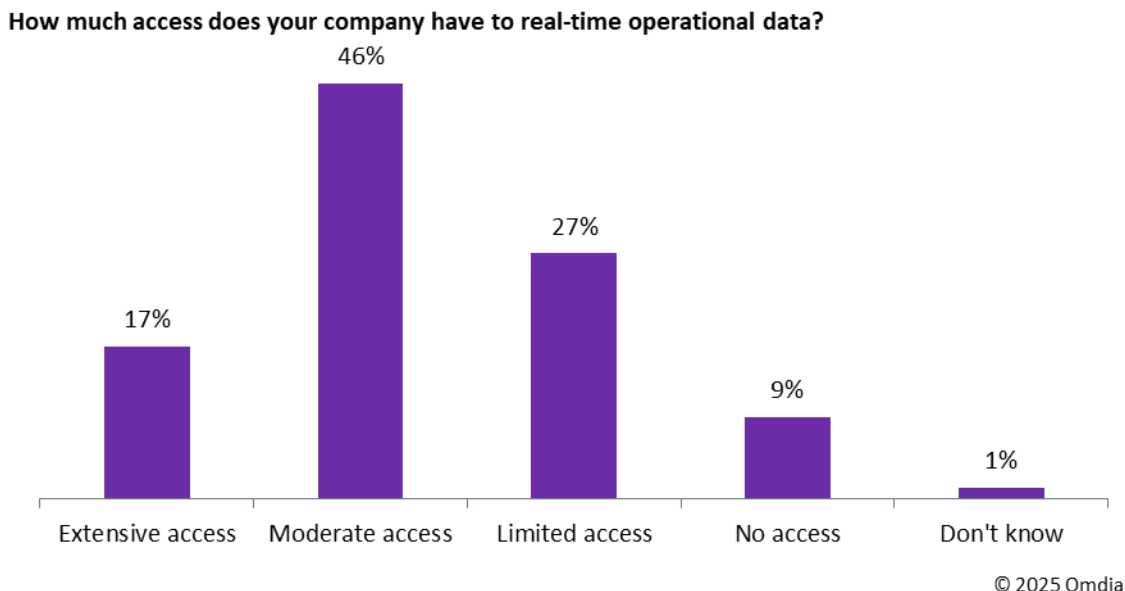
The role of data in strategic planning

The ability to make informed, timely decisions hinges on access to reliable data. Yet, for many studios, data remains fragmented across systems, teams, and departments. Finance operates one set of tools, HR uses another, and production teams rely on bespoke project management platforms. This separation makes it difficult to generate a cohesive view of business performance. When data must be manually extracted, reconciled, and interpreted across functions, the process is slow, error-prone, and often disconnected from real-time conditions.

The survey results show that only 17% of senior decision-makers believe their organization has extensive access to real-time operational data (see **Figure 5**). Many report that planning cycles are delayed due to incomplete or inconsistent data. In some cases, studios lack the ability to perform even basic scenario modeling, such as projecting the financial impact of changing a release schedule, delaying hiring, or reallocating resources. Without integrated data systems, these exercises require hours or days of manual work, often resulting in plans that are already outdated by the time they are finalized.

Only 17% of senior decision-makers have extensive access to real-time operational data.

Figure 5: Few studios make extensive use of real-time operation data



Source: Omdia, Workday

Strategic planning in the games industry requires visibility into multiple dimensions simultaneously: project timelines, development costs, hiring pipelines, market forecasts, and more. Each of these variables is dynamic. Player expectations evolve rapidly, and live service models require constant iteration. Studios must be able to assess not just whether a project is on time and on budget, but whether it aligns with shifting market trends and company goals. This level of decision-making depends on timely, accurate, and contextualized data.

Studios that invest in unified platforms for enterprise planning, finance, and HR are better positioned to handle this complexity. These systems allow decision-makers to view cross-functional data through a single lens. Finance teams can model revenue projections based on active development timelines. HR leaders can forecast headcount needs in coordination with product milestones. Executives can weigh investment in one project against opportunity costs elsewhere. When these insights are generated in near-real time, studios can respond faster to setbacks, market shifts, or new opportunities.

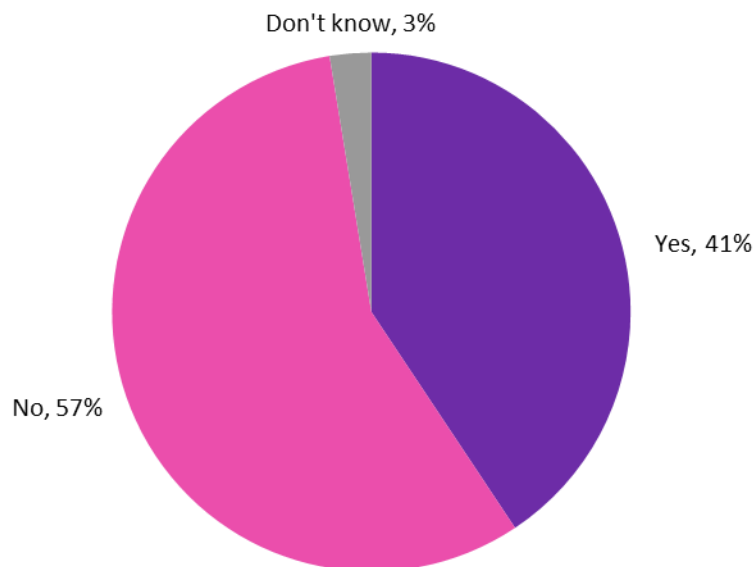
41% of companies say a lack of data visibility has hindered their ability to attract funding or investment.

The ability to plan strategically is also essential for capital efficiency. In a maturing industry with tighter margins, studios need to allocate resources where they will generate the greatest return. That requires insight into actual versus planned spending, employee utilization, vendor performance, and profitability by title or platform. This level of granularity is not possible without a data foundation that spans departments and systems. Modern planning tools not only provide this foundation, but also allow for iterative planning, enabling studios to adjust course without waiting for the next annual planning cycle.

A robust data strategy also supports investor confidence. As studios seek external funding or prepare for acquisition, their ability to present clean, consolidated financial and operational data becomes a differentiator. Disorganized or inconsistent reporting can delay deals or reduce valuation. Indeed, our survey established that 41% of respondents had found their ability to attract funding or investment hampered by a lack of data visibility (see **Figure 6**). By contrast, studios with unified systems can demonstrate control over costs, scalability of operations, and strategic clarity—attributes that appeal to investors, publishers, and potential acquirers alike.

Figure 6: Lack of data visibility frequently hinders studios' ability to attract funding and investment

Has a lack of visibility in performance or other data ever affected your company's ability to attract funding or investment?



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Source: Omdia, Workday

Ultimately, data is not just a reporting tool. It is the infrastructure of modern decision-making. Studios that treat data as a core business asset, and invest in systems that surface it accurately and in context, gain a clear operational advantage. They are more responsive, more efficient, and better aligned internally. In an environment where speed, precision, and focus determine success, that advantage is difficult to overstate.

Aligning creative and business goals

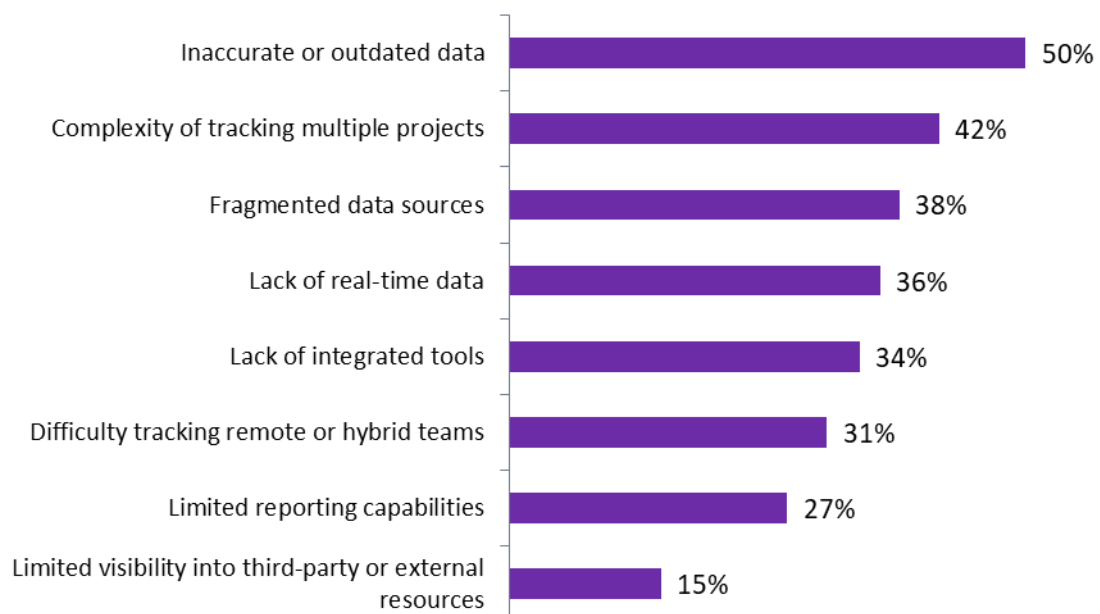
The video games industry is built on creativity. Studios exist to make engaging, imaginative experiences that resonate with players. However, as the industry matures, studios must also operate as disciplined businesses. They are tasked with managing budgets, hitting milestones, complying with regulations, and delivering shareholder value. The tension between creative freedom and operational discipline is one of the most persistent challenges in the sector.

Many studios struggle to bridge this gap. Creative teams may view business constraints as barriers to innovation, while finance or operations teams sometimes see the creative process as unpredictable or inefficient. These disconnects can result in misaligned priorities, delayed projects, and strained internal relationships. They also make it more difficult to evaluate trade-offs, such as extending production to improve quality versus shipping on time to meet revenue goals.

In many cases, the issue stems from a lack of shared visibility. 50% of respondents to the survey cited inaccurate or outdated data as a major challenge in gaining insights into resource allocation (see **Figure 7**). When project budgets, timelines, and staffing plans are maintained separately from creative roadmaps, it's difficult to coordinate effectively. Teams may pursue features or content drops without full awareness of cost implications or downstream effects on other departments. Likewise, finance may attempt to impose constraints without a full understanding of creative rationale or player impact.

Figure 7: Data shortcomings are the greatest challenge in resource allocation

What are your biggest challenges in gaining visibility into resource allocation?



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Source: Omdia, Workday

The solution is not to impose rigid structures that stifle creativity but to create systems that foster collaboration and informed trade-offs. When studios have integrated planning and reporting tools, creative and business leaders can work from the same set of facts. Production can model the impact of changing release dates. Finance can assess the return on investment for additional features. HR can align hiring timelines with project phases. This allows conversations to shift from abstract arguments to data-informed discussions, where trade-offs are evaluated transparently.

Modern technology platforms also help establish shared accountability. When goals are clearly defined, and progress is measured against consistent metrics, teams are more likely to stay aligned. For example, defining success for a live service game might include engagement metrics, revenue targets, and player satisfaction scores. With these KPIs in place, creative and business functions can align around a common objective and track progress collaboratively.

Technology can also help bridge cultural gaps. Studios that use modern HR tools can foster more transparent communication, set clear expectations, and ensure recognition for both creative and operational contributions. When all teams understand how their work ties into broader goals, and when their contributions are valued equally, alignment becomes a cultural norm rather than a forced negotiation.

Another important factor is leadership structure. Studios with strong alignment between creative, operational, and financial leadership report fewer delays and more efficient project delivery. These organizations often have cross-functional planning teams, shared KPIs, and regular integration points between disciplines. They also invest in tools that enable scenario modeling, allowing stakeholders to evaluate different options collaboratively before decisions are made.

Ultimately, the most successful studios are those that view creativity and operational discipline not as competing forces, but as complementary. Innovation thrives when supported by the right infrastructure. Business goals are more achievable when informed by a deep understanding of the creative process. By investing in systems and processes that connect these domains, studios can build organizations that are both artistically ambitious and operationally sound.

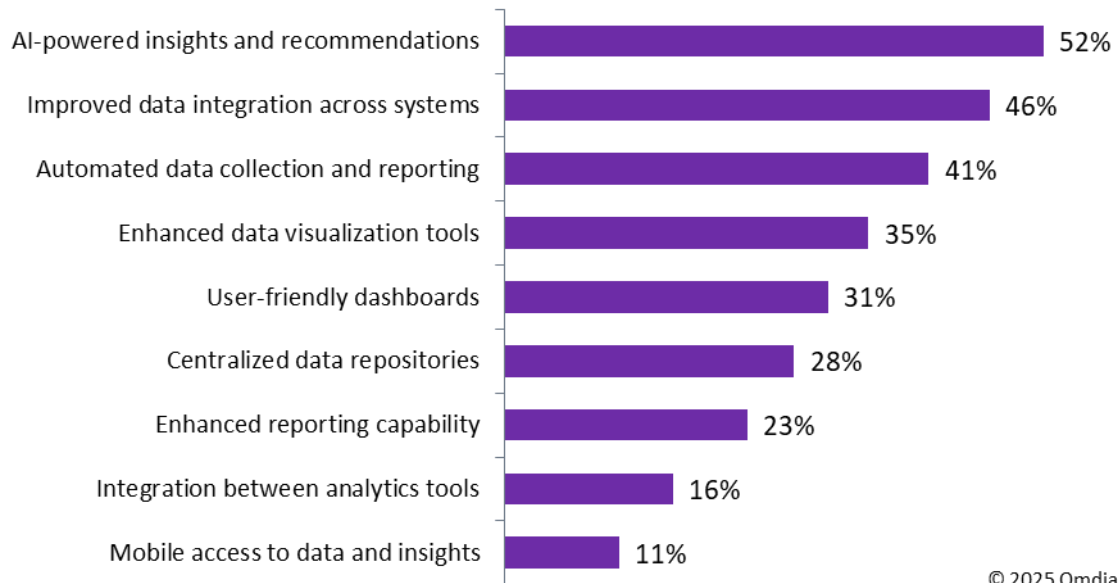
Investing in people and culture

Talent remains one of the most valuable resources in the video games industry. Studios compete for skilled developers, artists, designers, and producers in a labor market that continues to evolve. While creative expertise has always been a cornerstone of successful games, the increasing complexity of game development—combined with new expectations around workplace culture—makes it clear that talent strategy must be a top priority. Studios that treat people management as a back-office function risk falling behind in both innovation and execution.

The survey reveals that most senior decision-makers recognize the importance of attracting and retaining talent, yet many believe their current systems are not up to the task (see **Figure 8**). Too many companies rely on fragmented HR tools that provide limited insight into workforce data. Performance management is often handled inconsistently across teams. Hiring pipelines are difficult to forecast, and workforce planning is disconnected from production needs. These gaps not only affect operational efficiency, but also contribute to employee dissatisfaction and turnover.

Figure 8: More use of AI and automation are the most sought-after talent system improvements

Which improvements are most needed to enhance the visibility of data and insights in your company?



Source: Omdia, Workday

Studios are also navigating major shifts in how people work. Remote and hybrid models are now common, especially for roles in engineering, art, and QA. This distributed structure introduces new challenges around collaboration, onboarding, and team cohesion. At the same time, employee expectations around flexibility, inclusion, and career development have increased. Talented professionals now evaluate studios not just on compensation and projects, but on the quality of the employee experience.

A modern approach to people management requires integrated HR platforms that can support the full employee lifecycle, from recruiting and onboarding to development and retention. These systems must connect with planning and finance tools to provide a unified view of workforce capacity, costs, and productivity. For example, when studios plan to ramp up development on a new title, they should be able to model headcount needs, hiring timelines, and budget implications in a single environment. Similarly, real-time insights into employee engagement, turnover risk, and skill gaps can help HR teams take proactive measures to support retention and development.

Investing in people also means supporting internal mobility and upskilling. This is widely recognized: 82% of survey respondents considered skill-based management to be important to their company. However, as tools and workflows evolve, especially with the rise of technologies like procedural content generation and AI-assisted development, studios must equip their teams with new capabilities. Reskilling programs and career pathing initiatives are more effective when backed by systems that map employee skills to current and future roles. By taking a long-term view of talent

development, studios can reduce dependence on external hiring and improve retention of experienced staff.

Culture plays an equally important role. The pressures of game development—tight deadlines, creative pressure, and live service demands—can contribute to burnout and attrition. Studios that invest in leadership development, clear communication, and work-life balance are more likely to maintain engaged and productive teams. Culture is reinforced not just through policies, but through systems that support transparency, recognition, and employee input. For example, regular performance feedback cycles and goal alignment tools help employees understand their impact and stay connected to the studio's broader mission.

In short, a people strategy is not separate from a business strategy: it is a fundamental component of it. Studios that build strong, integrated people operations are better able to attract top talent, navigate labor market changes, and create cultures that sustain high performance over time. In a creative industry, the quality of the work is a direct reflection of the people who make it. Investing in those people is both a moral imperative and a strategic necessity.

Leveraging AI for operational and talent management

Artificial intelligence is no longer a speculative technology for the video games industry. It is already playing an active role in how studios manage operations, make decisions, and develop their workforce. While creative applications such as procedural generation and content optimization often capture headlines, the broader impact of AI lies in how it enables studios to operate with more speed, precision, and coordination.

The survey results underscore the growing appetite for AI-driven capabilities across business functions. When asked what improvements are most needed to enhance the visibility of data and insights, more than half of respondents cited AI-powered insights and recommendations. AI can fill a critical gap by processing complex, cross-functional datasets and surfacing insights that are otherwise difficult to uncover manually.

For example, machine learning models can identify cost overruns earlier in a project lifecycle by analyzing patterns in past performance, resource usage, and delivery timelines. AI can also support real-time decision-making by continuously analyzing live production data, allowing studios to adjust plans without waiting for formal reviews or manual reporting cycles.

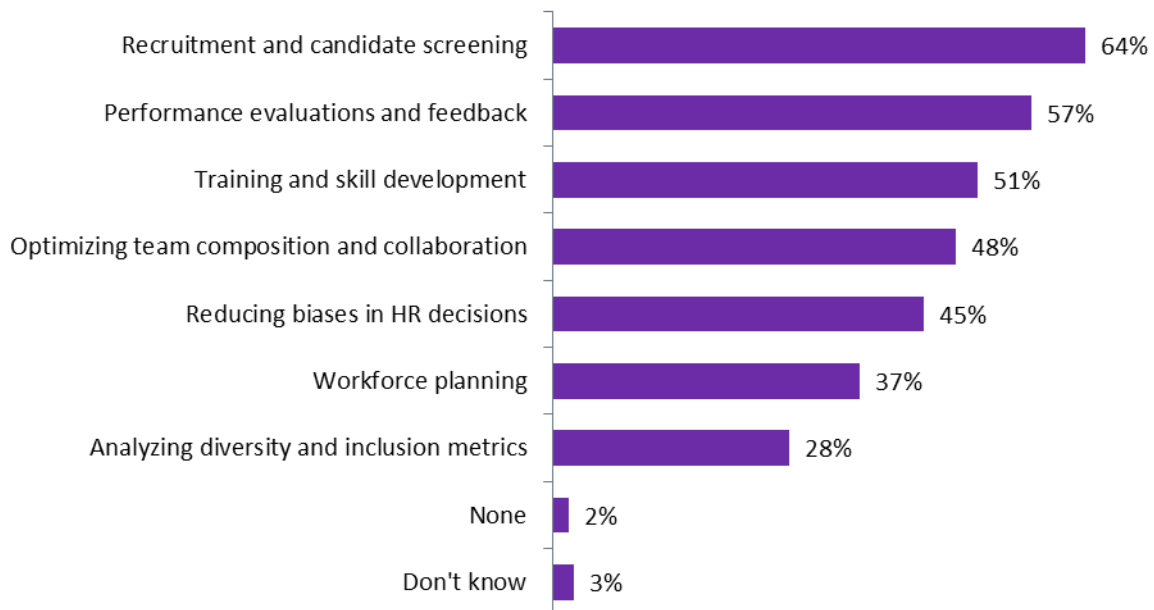
64% of respondents already use AI for recruitment or candidate screening.

These capabilities are particularly important as studios grow in size and complexity. With multiple projects, global teams, and varying business models, it becomes increasingly difficult for human teams to spot patterns, evaluate trade-offs, or anticipate risks in time. AI enables studios to augment decision-making with predictive analytics, helping leaders allocate resources more efficiently, prioritize initiatives based on expected ROI, and model different growth scenarios with far greater accuracy.

AI also plays a growing role in workforce and talent management. The survey shows that a majority of respondents already use AI for recruitment and candidate screening (64%), performance evaluation and feedback (57%), and training and skill development (51%) (see **Figure 9**). Studios are using AI tools to streamline hiring processes, reduce bias in evaluations, and personalize learning paths based on individual employee profiles. These applications support both efficiency and equity in the workplace.

Figure 9: Studios are already using AI for a range of talent management functions

What role does AI play in your talent management?



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Source: Omdia, Workday

Another high-impact area is team composition and collaboration, cited by 48% of respondents. AI systems can help identify skill gaps, suggest cross-functional teams based on complementary strengths, and optimize staffing based on project needs and past performance. These tools not only support better project outcomes, but also improve employee engagement by aligning individuals with roles where they can succeed and grow.

The benefits of AI also extend to diversity, equity, and inclusion (DEI). While still emerging, tools that analyze workforce data for representation trends, promotion rates, and pay equity are helping studios take a more data-driven approach to DEI. Just under 30% of survey respondents report using AI to support diversity and inclusion metrics, a figure expected to grow as these capabilities mature.

However, realizing the full potential of AI requires a foundation of clean, well-integrated data. Studios with fragmented systems, inconsistent reporting practices, or limited access to operational metrics will struggle to implement AI effectively. The quality of AI-driven recommendations depends heavily on the quality and consistency of the data on which they are built. As such, AI initiatives must be paired with broader efforts to modernize data infrastructure, standardize metrics, and connect systems across departments.

There are also important considerations around transparency, governance, and accountability. Studios must ensure that AI models are interpretable, decisions are auditable, and tools are used in ways that reinforce—not replace—human judgment. Ethical use of AI is essential to maintaining trust and fairness, particularly in areas such as hiring, performance evaluation, and compensation.

Conclusion: Delivering scalability, agility, and growth

As the video games industry continues to evolve, the operational demands placed on studios are increasing. Creative ambition is no longer enough. Success in this environment depends on whether studios can build organizations capable of scaling efficiently, responding quickly, and making better-informed decisions.

The survey of 155 senior decision-makers makes clear that many studios are already aware of the limitations of their current systems. Rising development costs, complex talent demands, and the shift to live service models are all forcing a reexamination of legacy processes. However, awareness alone is not enough. Studios must act, and act strategically.

Operational modernization is not a one-time initiative. It requires ongoing investment in systems, people, and processes that can adapt to change. Studios that commit to this transformation will be better equipped to deliver content reliably, manage risk proactively, and compete in a more disciplined market.

AI is now part of that equation. Studios that combine real-time operational data with AI-powered insights will have a critical edge, whether in managing projects, allocating talent, or anticipating player trends. This edge depends on foundational readiness: clean data, integrated systems, and a clear strategy for how technology supports business goals.

Ultimately, the studios that thrive will be those that rethink not just what they build, but how they build. The shift from reactive management to proactive, insight-driven operations is well underway. Now is the time to accelerate that shift and lay the groundwork for long-term, scalable success.

Recommendations for CFOs

- Shift to rolling forecasts and scenario-based planning to handle shifting timelines and revenue cycles.
- Replace spreadsheets with unified financial planning tools connected to HR and production data.
- Align finance more closely with creative and operational decision-making.
- Investigate leveraging AI for tasks such as detecting budget risks early and evaluating ROI across multiple projects.

Recommendations for CIOs

- Integrate core business systems—finance, HR, and operations—into a shared data environment.
- Prioritize platforms that support real-time insights and AI readiness.
- Automate reporting and data consolidation to reduce manual overhead.
- Build a data foundation that supports predictive analytics and cross-functional collaboration.

Recommendations for CHROs

- Implement integrated talent systems that support hiring, planning, and development in one place.
- Leverage AI for recruitment, performance evaluation, and workforce planning.
- Use data to track inclusion metrics and reduce bias in talent decisions.
- Align people strategies with production and financial goals.

Recommendations for COOs

- Standardize workflows across teams to reduce delays and execution risk.
- Establish shared KPIs, planning cycles, and centralized progress tracking.
- Use automation to streamline resource planning and project coordination.
- Focus on cross-team alignment to enable faster, more predictable delivery.

Appendix

Methodology

The data in the white paper is derived from a survey of 155 game developers conducted by Omdia on behalf of Workday. The fieldwork took place in December 2024 and January 2025, and included developers from across the US, UK, Germany, France, and the Nordics working at companies with a minimum of 100 employees.

The survey questionnaire was developed jointly by Workday and Omdia, including a total of 45 questions focusing on a range of topics, focusing on four major themes: scalability, agility, visibility, and talent management. The survey sample features a spread of roles, with participants restricted to suitable senior positions in leadership, business, finance, strategy, and IT.

Author

Liam Deane
Principal Analyst, Games Tech
askananalyst@omdia.com



Get in touch

www.omnia.com
askananalyst@omnia.com

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