



EUROPE'S
VIDEO GAMES
INDUSTRY

Key Facts

2020



FOREWORD

from Olaf Coenen, ISFE Chairman

At the time of drafting this year's Key Facts, Europe and much of the world was in lockdown due to the unprecedented global Covid-19 pandemic.

With the world in crisis, the global video games industry has been harnessing its reach, its imagination, and its unique ability to connect and entertain people whilst keeping them safe at home. Our sector has made significant financial donations to regional, national and global relief funds. We have leveraged our reach and influence through initiatives to communicate public health messaging, provided free access to educational and fitness games and engaged in numerous imaginative projects. In doing so it has ensured its contribution to keeping people safe, connected, entertained, educated, fit and mentally well in the real world has been felt by

all those that enjoy our virtual ones. Key Facts 2021 will no doubt tell an unusual story that will take account of the Covid-19 period of 2020.

This year's edition focuses on the story of 2019 where the sector has continued to be a considerable part of Europe's digital and creative success with a turnover of €21.6bn, a 3% year-on-year growth from 2018. 2019 was also the year when streaming and on-demand video game services began to emerge and our esports actors joined forces to create a united voice.

We will follow these trends during 2020, a particularly exciting year, with the arrival of the next generation of consoles. Undoubtedly our role in educating and informing consumers, players and parents about responsible gameplay will continue to be at the centre of our activity, just as it was in 2019 which saw the launch of national information campaigns in five more European countries. In 2020, we will also work with our members on environmental responsibility and sustainability initiatives supporting European and global goals to address the climate crisis.

With more than half of the European population enjoying video games in various forms, and inspiring new levels of understanding and ways of communicating with a global community, ISFE looks forward to continued engagement with our members and stakeholders in 2020 and beyond.

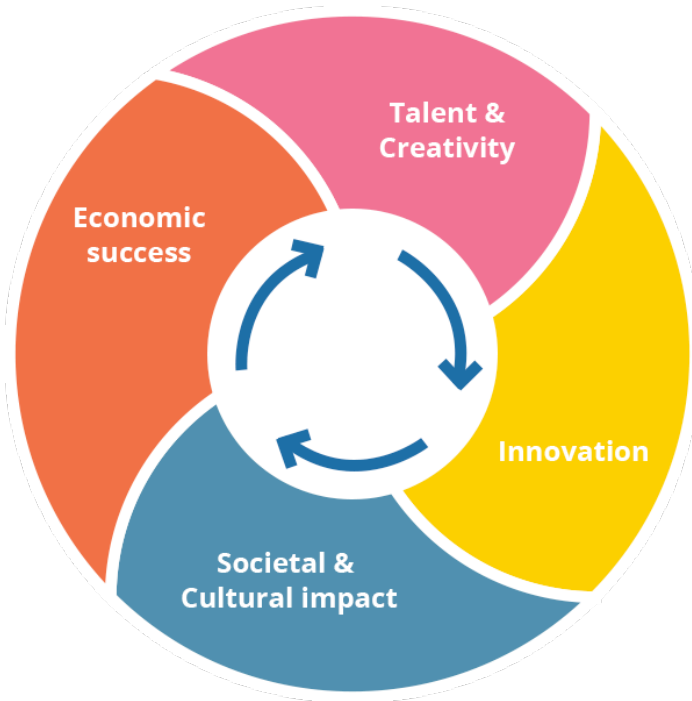


Dr. Olaf Coenen, ISFE Chairman
Vice President International Publishing for Europe and Latin America, Electronic Arts

“

Players are at the heart of what we do. ISFE ensures the voice of a responsible games ecosystem is heard and understood, that its creative and economic potential is supported and celebrated, and that players around the world continue to enjoy great video game playing experiences.

”



THE INDUSTRY

MARKET SIZE IN THE EU*

€21.6bn
Total EU market size*



+3%
since 2018

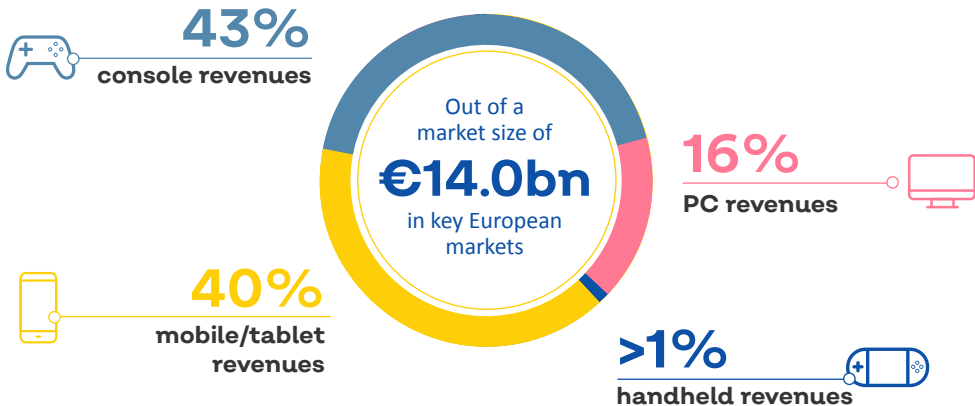
+55%
since 2014 in key
European markets



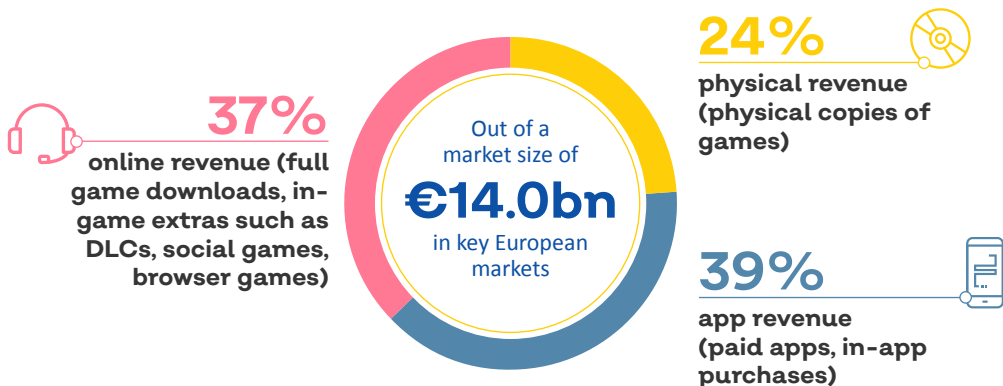
Sources: GameTrack data, provided by IPSOS MORI and commissioned by ISFE.

* Market size data is extrapolated from GameTrack 2019 report and Newzoo 2019 Global Data Report

REVENUE SPLIT BY DEVICE, IN KEY EUROPEAN MARKETS IN 2019




REVENUE SPLIT BY TURNOVER, IN KEY EUROPEAN MARKETS IN 2019



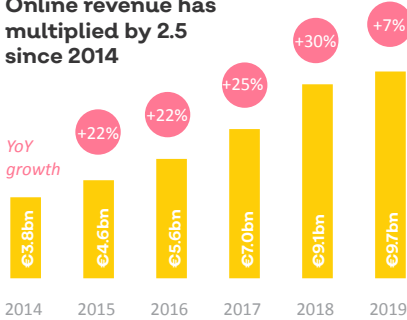
Sources: GameTrack data, provided by IPSOS MORI and commissioned by ISFE.

KEY TRENDS – ONLINE ENVIRONMENT

REVENUE GENERATED BY THE ONLINE ECOSYSTEM IN KEY EUROPEAN MARKETS

 Italy is not included because of lack of available data before 2018

Online revenue has multiplied by 2.5 since 2014



66%

In-game extras, additional downloadable content for games already bought

 21% Full game downloads

 13% Subscription services and social games



EMERGENCE OF STREAMING/ON-DEMAND SERVICES

Since 2019, players have been able to play video games with just an internet connection

€324m
2019 revenue

EU PLAYERS GIVE THE FOLLOWING REASONS FOR SUBSCRIBING TO ON-DEMAND/SUBSCRIPTION SERVICES:

 30% say they can play anywhere

 28% say it saves times (no download required)

 23% say they can play on any device

43%

of European players believe their internet connection is fast enough to enjoy streamed games

33%

of European players worry about their internet connection dropping, impacting on their enjoyment of streamed games

>30%

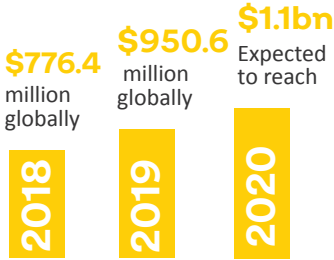
of European territory is covered by fibre (South Korea: 82%, Japan: 79%)*

Sources: GameTrack data, provided by IPSOS MORI and commissioned by ISFE.

* OECD broadband statistics update, March 2020 <https://www.oecd.org/sti/broadband/broadband-statistics-update.htm>

KEY TRENDS - ESPORTS

ESPORTS IS WORTH*



PROFILE OF EUROPEAN ESPORTS SUPPORTERS**



Represent **15%** of all European players in key territories



The **25-34 age group** is the most represented (30%)



32% of supporters watch esports at least weekly



The vast majority follow esports online (Twitch, YouTube)



ISFE Esports was established in 2019 to bring together ISFE's wide games publisher and national trade association membership (many of which also represent other important esports stakeholders) with major tournament organiser ESL, media platform Twitch and leading non-ISFE member, Riot Games. The members of ISFE Esports are committed to growing the sector in a responsible way for the benefit of all related businesses, players and fans.

ISFE Esports' guiding principles of engagement promote esports that are fun, fair, and enjoyed by players around the world in an open and inclusive environment.



Learn more at www.isfe.eu/isfe-esports

ISFE ESPORTS PRINCIPLES



Safety and well-being



Integrity and fair play



Respect and diversity



Positive and enriching game play

Sources: *Newzoo 2020 Global Esports Market

**GameTrack data, provided by IPSOS MORI and commissioned by ISFE.

TOP SELLING GAMES OF 2019



FIFA 20
Electronic Arts



Grand Theft Auto V
Rockstar Games



Call of Duty: Modern Warfare
Activision Blizzard



FIFA 19
Electronic Arts



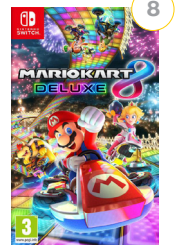
Red Dead Redemption 2
Rockstar Games



Tom Clancy's Rainbow Six Siege
Ubisoft



Star Wars Jedi: Fallen Order
Electronic Arts



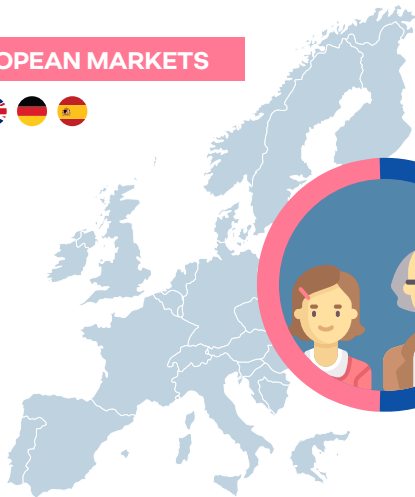
Mario Kart 8 Deluxe
Nintendo



Crash Team Racing Nitro-Fueled
Activision Blizzard

DEMOGRAPHICS

EUROPEAN MARKETS



51%

of the population
aged 6-64
play video games

AMONG VIDEO GAME PLAYERS



59%

Play on **mobile or tablet**



54%

Play on **consoles**



51%

Play on **computers**



17%

Play on **handhelds**



17%

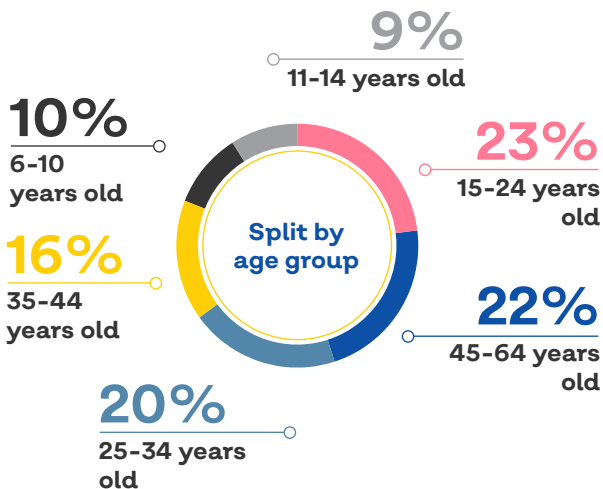
Play on **every device**
(except handhelds)

Sources: GameTrack data, provided by IPSOS MORI and commissioned by ISFE.

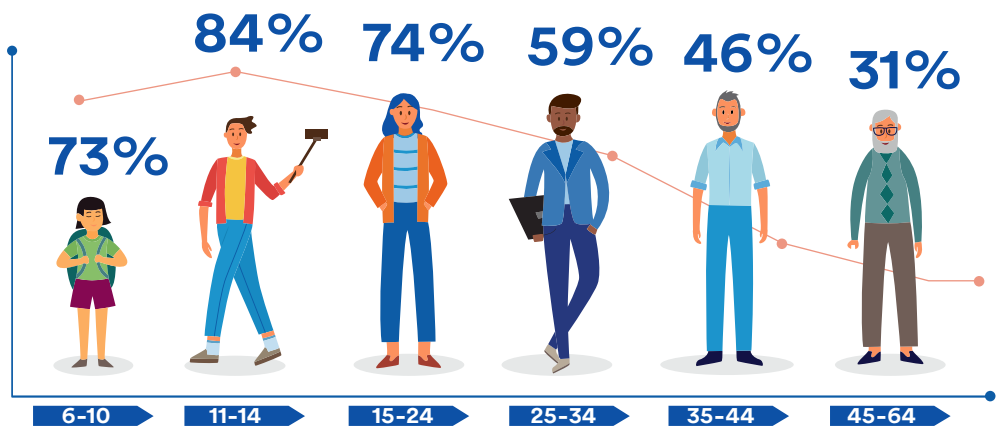


31 years old

is the average age of a video game player in the EU



SHARE OF VIDEO GAME PLAYERS AMONG THE WHOLE POPULATION IN KEY EUROPEAN MARKETS BY AGE GROUP



Sources: GameTrack data, provided by IPSOS MORI and commissioned by ISFE.

AMONG EUROPEAN PLAYERS

8%

play at least once a year

15%

play at least one hour per month



77%

play at least one hour per week

ON AVERAGE, PEOPLE IN THE EU



8.6h/week

average time spent playing video games



14h/week

average time spent on social media*



25h/week

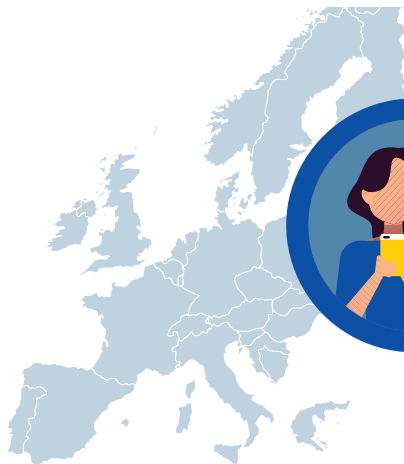
average time spent watching TV**

Sources: GameTrack data, provided by IPSOS MORI and commissioned by ISFE.

*GlobalWebIndex 2012-2019, Question: On an average day, how long do you spend on social media?, Base respondents: 424,326 (2019) internet users aged 16-64)

**EU audiovisual observatory, Yearbook 2018-2019

WOMEN & VIDEO GAMES



45%

of European video game players are women

AMONG FEMALE VIDEO GAME PLAYERS



86%

play single player modes



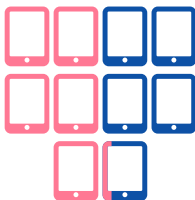
16%

play offline multiplayer modes



23%

play online multiplayer modes



Women represent

51%

of all mobile and tablet video game players



Girls who play video games are

3x

 more likely to study

for a STEM degree than girls who don't play video games*

Sources: GameTrack data, provided by IPSOS MORI and commissioned by ISFE.

*HOSEIN Anesa, "Girls' gaming behaviour and undergraduate degree selection: A secondary data analysis approach", Computers in Human Behaviour, vol. 91, February 2019, pp. 226-235, University of Surrey)

DIVERSITY & VIDEO GAMES

ISFE supports all our national trade association and company members who engage in campaigns to promote diversity such as Raise the Game in the UK and Hier Spielt Vielfalt in Germany. Both campaigns include declarations whereby the signatories agree to promote diversity in the workforce, to create welcoming places to work and to reflect diversity in the games themselves.

#RaiseTheGame

www.raisethegame.com

Aims to get 50% of studios based in the UK signed up by end of 2020

Provides guidance to studios and dedicated events to promote diversity



HIER SPIELT VIELFALT
#TEAMDIVERSITY

www.hier-spielt-vielfalt.de/en

Signed by 400 companies & 800 individuals

Cooperation with other events and initiatives to promote gender diversity and inclusive game design (Able Gamers, Womenize!)

LARGEST EVER GAMES INDUSTRY DIVERSITY CENSUS

Ukie, the UK trade body representing video games, launched, with the University of Sheffield, the largest games industry diversity census ever, covering more than 3,200 UK video games professionals.




66%
of UK video games professionals are under **35 years old**



28%
of the overall games workforce hold **non-UK nationalities**, and international workers make up a third of core games productions



21%
of people working in games are **LGBTQ+**, which is significantly higher than the proportion of LGBTQ+ in the overall UK population



81%
of the industry is **educated to at least undergraduate level**, considerably above the 57% average for the UK cultural and creative industries

RESPONSIBLE GAMEPLAY



PEGI is the pan-European age rating system for video games. PEGI's aim is to educate consumers and parents in particular to protect minors from exposure to potentially unsuitable game content. PEGI also ensures that games are sold and advertised in a responsible manner, opportunities for consumer redress are available, and online game playing environments are safe.

PEGI ratings are established under the supervision of independent experts and classification bodies. PEGI is recognised by the European institutions and national Member States as a model for European harmonisation in the field of minor protection and consumer transparency.

Learn more about PEGI at www.pegi.info or download the PEGI app on iOS/Android



35+
European countries



2,400
member companies



35,000+
games and millions of apps classified

PEGI'S NEW FEATURES AND SERVICES TO SUPPORT PARENTS

A new PEGI app



In 2019, PEGI launched an easy-to-use app in local languages across Europe. Available for both iOS and Android, information about a game is just a click away.

Further transparency on in-game purchases



PEGI has enhanced its in-game purchase descriptor to include an additional notice below the label that informs consumers if an in-game purchase includes paid random items (such as loot boxes or card packs)

AGE LABELS



Suitable for all age groups, no unsuitable content



May contain some non-realistic or implied violence, and scenes that might be frightening to younger children



Can feature realistic violence against fantasy characters, non-realistic violence against humanlike characters, mild bad language, or sexual innuendo



May depict realistic violence against humanlike characters, bad language, use of drugs, or erotic nudity



Games that contain gross violence, against defenceless characters, glamorisation of drugs, or explicit sexual activity



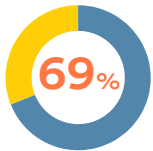
VIDEO GAME COMPANIES ARE COMMITTED TO PROVIDING PARENTS AND CHILDREN WITH THE HIGHEST LEVEL OF INFORMATION TO ENSURE SAFE AND RESPONSIBLE GAMEPLAY AND PEGI IS CONSTANTLY ADAPTING ITS CLASSIFICATION SYSTEM TO NEW TRENDS



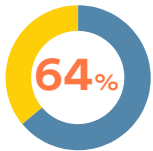
PARENTAL SUPERVISION

CLASSIFICATION SYSTEMS SUCH AS PEGI ARE ESSENTIAL IN HELPING PARENTS CHOOSE SUITABLE GAMES FOR THEIR CHILDREN

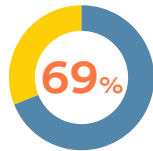
Among parents with children who play video games



are aware of PEGI age labels



think PEGI labels clearly show what a game will contain



find PEGI labels useful in deciding whether or not to buy a game for their children

2/3

of parents do not allow their children to spend money in-game

8 of 10

have an agreement of some kind with their children, which is an increase from 2018 (from 79% to 85%)

3%

of parents alone do not monitor their children's spending

58%

of parents have an agreement with their children that they ask permission prior to a purchase

35%

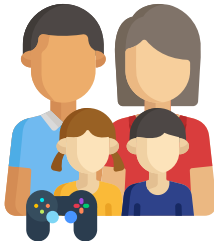
of parents agree a weekly/monthly spend limit with their children

26%

of parents use pre-paid value cards

21%

of parents use parental control tools





18%

of parents monitor credit card bills

Sources: GameTrack data, provided by IPSOS MORI and commissioned by ISFE.

PARENTAL CONTROL TOOLS

Besides self-regulatory classification systems, the video games industry offers parents several tools to monitor their children’s video game playing behaviour. For every device, it is possible to set up parental control tools which control:

 <p>Age rating</p> <p>Age filtering for online content and video games</p>	 <p>Time limit</p> <p>Manage your child’s playtime</p>	 <p>Online spending</p> <p>Disable or limit spending</p>	 <p>Online interaction</p> <p>Restrict communications with others, restrict the viewing of content from the gameplay or created by other players</p>
---	---	---	--

LIST OF DEVICES OFFERING PARENTAL CONTROL TOOLS

 <p>Playstation 4</p>	 <p>Xbox One</p>	 <p>Nintendo 3DS</p>	 <p>PS Vita</p>
 <p>Nintendo Switch</p>	 <p>Nintendo Switch Lite</p>	 <p>Windows</p>	 <p>Mac OS</p>
 <p>iPhone/iPad</p>	 <p>Android/Google Play</p>	 <p>Windows 10</p>	 <p>Google Stadia</p>

GUIDANCE ACROSS EUROPE

To provide **tips and guidance** to parents to engage with their children on their online activities

To explain **how to activate parental control tools** available on every device

To promote the **added-value benefits of playing video games**, such as in education





ask about games
The UK's #1 Rating Board

Ask about games
United Kingdom
www.askaboutgames.com



PédaGoJeux
France
www.pedagojeux.fr



The Good Gamer
Spain
www.thegoodgamer.es



#SaberJoger
Portugal
Available soon



Jouez Malin
Speel het Slim
Belgium
www.jouezmalin.be
www.speelhetslim.be



ELTERN RATGEBER
COMPUTERSPIELE

Respektvoll in Online-Games
Germany
<https://bit.ly/3gE2vUo>



DATASPELSBRANSCHEN
Swedish Games Industry

Fraga, Prata, Spela
Sweden
www.fragaprataspela.se

zapyta o gry
Poland
www.zapytajogry.pl



GemeinsamSpielen
Austria
www.gemeinsamspielen.at



Tutto sui videogiochi
Italy
www.tuttosuivideogiochi.it

ISFE's 5 tips for parents
EUROPE
<https://www.isfe.eu/news/5-tips/>



participants



countries

European Schoolnet (the network of 34 Ministries of Education) and ISFE teamed up to run Games in Schools, a project aimed at training teachers across Europe on the use of commercial video games as pedagogical support in the classroom. The project started with a 6-week long Massive Online Open Course (MOOC) including the following modules:



1 Why use computer games in the classroom?



2 Using games for thematic learning



3 Learning games



4 What can we learn from games?



5 Designing games



6 Why is it important to teach about games?

At the end of the course, teachers were asked to come up with a tailored lesson plan with game-based learning elements. An Editorial Board of Teachers will peer-review the lesson plans and include the best ones in the teacher's handbook on the use of video games in schools.

96%

of participants reported they will use the examples presented in the MOOCs in their everyday work

Data used in this publication is extracted from GameTrack and GSD reports

GameTrack provides information on players' behaviours around three metrics: volume – value – playing habits. Data covers France, Germany, Italy, Spain and the UK

Games Sales Data (GSD) is the first video games chart to provide sales data for both retail and digital markets. It covers physical and digital sales in 42 EMEA territories

MEMBERS

Video game companies

- Activision Blizzard
- Bandai Namco
- Bungie
- Electronic Arts
- Epic Games
- Microsoft
- Niantic
- Nintendo
- Roblox
- Sega
- Sony Interactive Entertainment
- Square Enix
- Supercell
- Take 2 Interactive
- Ubisoft
- Warner Bros Interactive
- ZeniMax Europe

National Trade Associations

- Austria: OVUS
- Belgium: BEA Interactive
- France: S.E.L.L.
- Germany : game
- Italy : IIDEA
- Netherlands : NVPI Interactief
- Nordic (Denmark, Finland, Norway, Sweden): ANGI
- Poland: SPIDOR
- Portugal: AEPDV
- Spain: AEVI
- Switzerland: SIEA
- United Kingdom: Ukie

CONTACT

T: +32 261-21777
✉ info@isfe.eu

📍 Rue Guimard 15,
1040 Brussels

🇪🇺 EU transparency Register
ID: 20586492362-11

🐦 @ISFE_Games

Designed by AdGrafics Design Studio



EUROPE'S
VIDEO GAMES
INDUSTRY