Europe's video game sector
Market data and demographics

Creative Europe Desks meeting
25 October 2019
ISFE MEMBERS

NATIONAL TRADE ASSOCIATIONS

VIDEO GAME COMPANIES
ISFE’S MISSION

• Serve the video games eco-system and ensure that diversity, skill and creative talent grow in Europe
• Raise the bar in harmonised self-regulation and responsible gameplaying – PEGI is the pan-European age rating system
• Build awareness and understanding of games and their value-added benefit to society
• Contribute to a healthy economic growth in Europe by engaging with policy makers and stakeholders
• Provide strategic data on the economics and demographics of the video games ecosystem

More data on studios, employment, diversity, exports etc is needed. Improved statistical framework necessary!
TALENT DRIVES OUR SUCCESS

€21bn revenue with a 15% growth year on year. 76% of the revenue from app stores comes from games.

54% of the EU population play games, some 250 million people, and 395 million people watch esports (globally).

Video games are a unique, complex work to which a multitude of professions have contributed, such as coders, audio designers, actors, scriptwriters…. multiple contributors and long development process.

Drive innovation in AI, VR, AR spilling over to other sectors.
EUROPEAN REVENUE

Revenue split by turnover in key European markets

26% physical revenue (physical copies of games)

34% app revenue (paid apps, in-app purchases)

40% online revenue (full game downloads, in-game extras, social games...)

+15% year on year (YoY)

Increase in key European markets

Market size of €12.3bn

ONLINE REVENUE is driven by:

34% in-game extras

42% full game downloads

24% social/ MMO* subscriptions/ browser revenues

*Massively Multiplayer Online (MMO) games subscriptions refer to online games requiring a monthly subscription to be played
Evolution in numbers: sales (UK, DE, FR, ES)

2013

- €8bn
- Packaged revenue: 62%
- App revenue: 15%
- Online revenue: 23%

2018 (+53%)

- €12,3bn
- Packaged revenue: 26%
- App revenue: 34%
- Online revenue: 40%

Source: GameTrack
DEMOGRAPHICS

THE AVERAGE AGE OF A GAMER IN THE EU IS 31 years old

25-34 is the strongest growing age group with an 8% growth in 2018

In average EU gamers play 8.7 hours per week

In comparison, in average, people in the EU watch TV 22.8 hours per week

Source: European Audiovisual Observatory
WOMEN IN GAMES

46% of EU gamers are women

Women represent 52% of all mobile and tablet gamers

Girls who play video games are 3X more likely to study for a STEM degree than girls who don’t play video games*

A Pan-European content classification system based on the **PEGI Code of Conduct**, which:

- provides parents and educators with objective, intelligible and **reliable information**
- Ensures **responsible advertising**, marketing and promotion
- Offers **consumer redress and sanctions** mechanisms
- Provides a **safe online gaming** environment

**GOVERNANCE**

- PEGI Legal Committee
- PEGI Council
- National Member States
- PEGI Independent Experts Group
- PEGI Independent Complaints Board
- PEGI Enforcement Subcommittee

**5 Age labels**
- 3
- 7
- 12
- 16
- 18

**8 content descriptors**
- Violence
- Fear
- Bad language
- Drugs
- Sex
- Gambling
- Discrimination
- In-game purchases

**+35 countries**

**+2,000 Members**

**+30,000 games and apps classified**
PAN EUROPEAN GAME INFORMATION : PEGI

Council resolution on labelling of video games

Part of PEGI Code of Conduct on duty of care online

IARC is the International Age Rating Coalition, for digital only products, set up by PEGI, ESRB and USK

Google Play implemented IARC

Continuous update to the digital environment

Germany has its own rating system since 20 years: USK. PEGI and USK collaborate closely

https://pegi.info/
Information campaigns across Europe aim to **educate** parents, care givers and players about **video game age ratings**, provide advice on **how to play games safely and responsibly**, and offer **families helpful tips** to ensure they get the most out of the games they enjoy together.

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
USE OUR NETWORK!

Engage with the national trade associations (local ISFE and EGDF members)

Seek opportunities to promote the Creative Europe programme at the national Games Weeks
ISFE members organise *trade fairs* which attract many local and European developers.

<table>
<thead>
<tr>
<th>Location</th>
<th>Dates</th>
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<tbody>
<tr>
<td>London, UK</td>
<td>Two weeks in March/April</td>
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<td></td>
<td>02-14/04/2019</td>
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<td>Malmö, Sweden</td>
<td>Last week of May</td>
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<td>22-24/05/2019</td>
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<td>Milan, Italy</td>
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<td>27-29/09/2019</td>
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<td>Madrid, Spain</td>
<td>First week of October</td>
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<td>Paris, France</td>
<td>Last week of October</td>
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<td>30/10/19 – 03/11/19</td>
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Cologne, Germany
25-29/08/2020
Gamescom is the largest consumer show in the world which attracts around 400,000 visitors every year.

Dedicated area of small developers studios where they can present their game and future projects.

On 26 August, Gamescom Congress will gather experts to discuss the latest trends in video games, around 5 themes:

1. Public stage
2. Learning with games
3. Living with games
4. Future with games
5. Law and games

Funding opportunities can be one of the topic of discussion.
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<thead>
<tr>
<th>Country</th>
<th>Organization</th>
<th>Contact Person</th>
<th>Email Address</th>
</tr>
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<tr>
<td>AUSTRIA</td>
<td>OVUS</td>
<td>Niki Laber</td>
<td><a href="mailto:nl@ovus.at">nl@ovus.at</a></td>
</tr>
<tr>
<td>BELGIUM</td>
<td>BEA INTERACTIVE</td>
<td>Pieter Swaelens</td>
<td><a href="mailto:pieter.swaelens@belgianentertainment.be">pieter.swaelens@belgianentertainment.be</a></td>
</tr>
<tr>
<td>DENMARK, FINLAND, NORWAY, SWEDEN</td>
<td>ANGI</td>
<td>Per Strömback</td>
<td><a href="mailto:per.stromback@datspelsbranschen.se">per.stromback@datspelsbranschen.se</a></td>
</tr>
<tr>
<td>FRANCE</td>
<td>S.E.L.L.</td>
<td>Emmanuel Martin</td>
<td><a href="mailto:e.martin@sell.fr">e.martin@sell.fr</a></td>
</tr>
<tr>
<td>GERMANY</td>
<td>game</td>
<td>Felix Falk</td>
<td><a href="mailto:Felix.Falk@game.de">Felix.Falk@game.de</a></td>
</tr>
<tr>
<td>ITALY</td>
<td>AESVI</td>
<td>Thalita Malago</td>
<td><a href="mailto:thalita.malago@aevi.it">thalita.malago@aevi.it</a></td>
</tr>
<tr>
<td>NETHERLANDS</td>
<td>NVPI INTERACTIEF</td>
<td>Martijn Schenderling</td>
<td><a href="mailto:Martijn.Schenderling@nvpi.nl">Martijn.Schenderling@nvpi.nl</a></td>
</tr>
<tr>
<td>POLAND</td>
<td>SPIDOR</td>
<td>Dominika Urbanska-Galanciak</td>
<td><a href="mailto:durbanksa@spidor.pl">durbanksa@spidor.pl</a></td>
</tr>
<tr>
<td>PORTUGAL</td>
<td>AEPDY</td>
<td>Tiago Sousa</td>
<td><a href="mailto:tiago.sousa@aepdv.pt">tiago.sousa@aepdv.pt</a></td>
</tr>
<tr>
<td>SPAIN</td>
<td>AEVI</td>
<td>José-Maria Moreno</td>
<td><a href="mailto:immorena@aevi.org.es">immorena@aevi.org.es</a></td>
</tr>
<tr>
<td>SWITZERLAND</td>
<td>SIEA</td>
<td>Peter Züger</td>
<td><a href="mailto:gf@siea.ch">gf@siea.ch</a></td>
</tr>
<tr>
<td>UNITED KINGDOM</td>
<td>UKIE</td>
<td>Dr. Jo Twist OBE</td>
<td><a href="mailto:jo@ukie.org.uk">jo@ukie.org.uk</a></td>
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Thank you!

Ann Becker
Head of Policy & Public Affairs

ann.becker@isfe.eu
www.isfe.eu