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KEY FACTS 2020

THE YEAR WE PLAYED TOGETHER

FOREWORD

From Olaf Coenen, Chair of ISFE and
Hendrik Lesser, President of EGDF

We are delighted to present the first joint ISFE-EGDF Key Facts. This 2021 edition highlights the benefits of the sector to players and society alike and represents an important step in the collaboration between Europe's two main industry associations. The pooling of European industry data, from the smallest European studios to the biggest companies, creates an unprecedentedly clear and more complete picture of Europe's video games sector.

Despite our own struggles and personal losses during this time, as a collective, we were able to support society in a variety of ways throughout the pandemic. We connected people whilst they were physically apart; provided entertainment; kept players mentally and physically well; supported education, leveraged our reach to communicate public health messaging, and made financial contributions to relief funds. Alongside this, we noted that a number of parents joined in playing video games with their children and the world saw that video games can be a force for good. Ultimately, we played our part, all whilst navigating the challenges of remote-working, recruitment problems due to travel restrictions, delayed releases, and reduced funding in new development and publishing.

We were also able to demonstrate the agility of our dynamic sector, as well as how, as a digital-centric industry, we were well-positioned to deal with the crisis, delivering new games and consoles, despite the enormous challenges. However, the pandemic was still especially hard on smaller and medium-sized companies. To remedy this, EGDF, for example, held the European Games BizDev Gathering event for companies to pitch online during the pandemic. Going forward, we

believe we must focus on creating more pandemic-resistant jobs and growth. Our sector is well-positioned to be a driving force in Europe's economic recovery if the necessary political and economic support is provided.

As popularity of our games grew, our members' commitment to responsible gameplay and to the protection of younger and vulnerable players continued to be part of our daily work, through hosting events, launching education campaigns and embracing the update of the PEGI code of conduct – the best-in-class self- and co-regulatory model that places minor protection, player safety and well-being at the heart of video gameplay. We remain committed to ensuring players get the best possible experience from video games and our work in this area has grown during the pandemic.

We have also further advanced in the important areas of diversity, equality and sustainability by becoming a Women in Games corporate ambassador and joining the United Nations-facilitated Playing for the Planet Alliance. Through these two commitments, we want to support Europe's video game companies, whether big or small, to increase diversity in the workplace as well as in video game content, and to take action to address the climate crisis.

2021 is also the year Brexit became a reality – but our UK members remain an integral part of our respective associations and the UK video games sector remains a crucial player in the European market.

We look to 2022 with optimism, with renewed confidence in what we can achieve together, with renewed energy for what we in the video games sector can do to play our part in Europe's recovery, and with renewed determination to harness the talent and potential of Europe's workforce to fuel innovation, creativity, jobs and prosperity in Europe's digital economy.



Dr. Olaf Coenen

ISFE Chair

VP Global Commercial Management at Electronic Arts



Hendrik Lesser

EGDF President

CEO, Remote Control Productions

Data used in this publication is extracted from GameTrack, GSD and the EGDF-ISFE European Video Games Industry Insights reports

GameTrack collects data on the behaviours of game players based on three metrics: volume, value, and playtime. Data covers France, Germany, Italy, Spain, and the United Kingdom.

Games Sales Data (GSD) is the first video games industry chart to include data on both retail and digital sales. The retail panel includes 25 European countries, while the digital panel includes 50 markets throughout Europe, the Middle East, Africa, and Asia.

The EGDF-ISFE European Video Games Industry Insights report includes useful insights for the video games industry as well as European industry data.

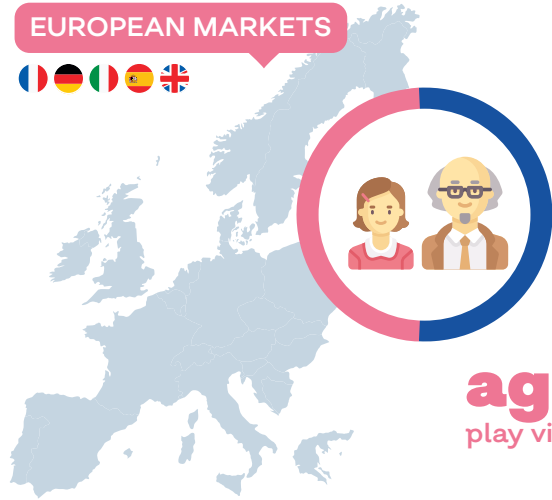
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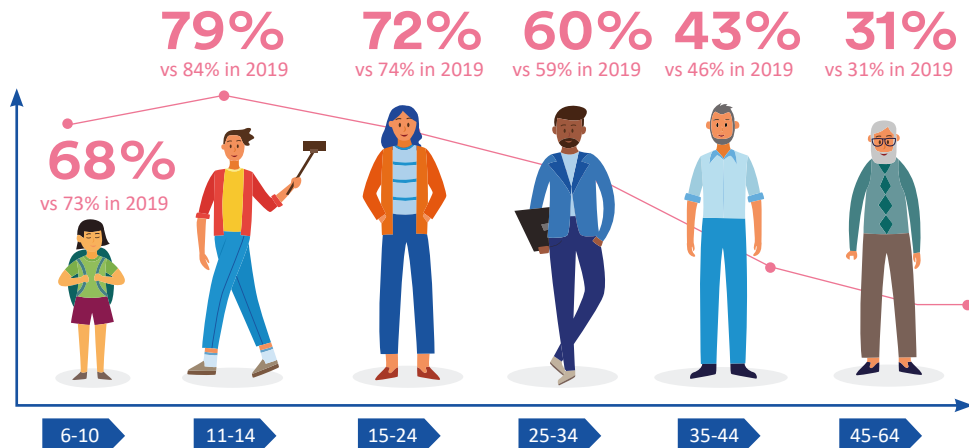
EUROPEAN VIDEO GAME PLAYER WHO WE ARE

EUROPEAN MARKETS



The average video game player may not be who you think. No matter where we play or who we play with, video games evoke the spirit of play in all of us.

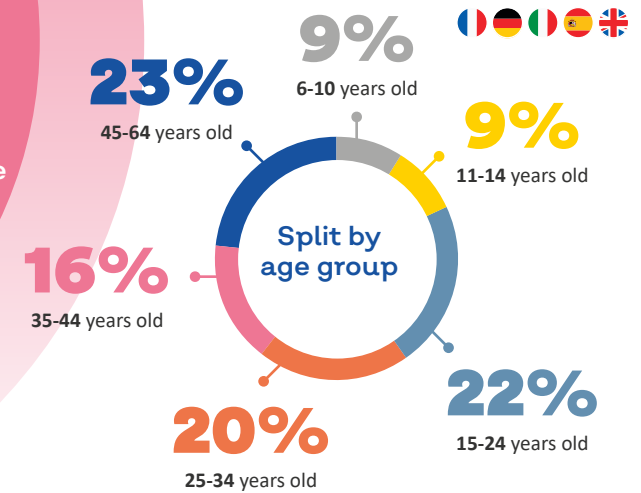
SHARE OF VIDEO GAME PLAYERS BY AGE GROUP



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

31.3

years old is the
average age of
a video game
player in Europe



AVERAGE PLAYTIME/ WEEK

9.5hrs

2020



8.6

hours

2019



8.8

hours

2018



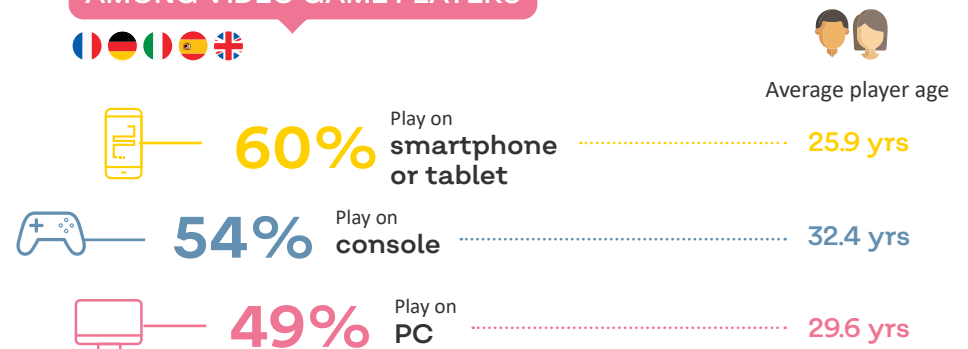
9.2

hours

2017

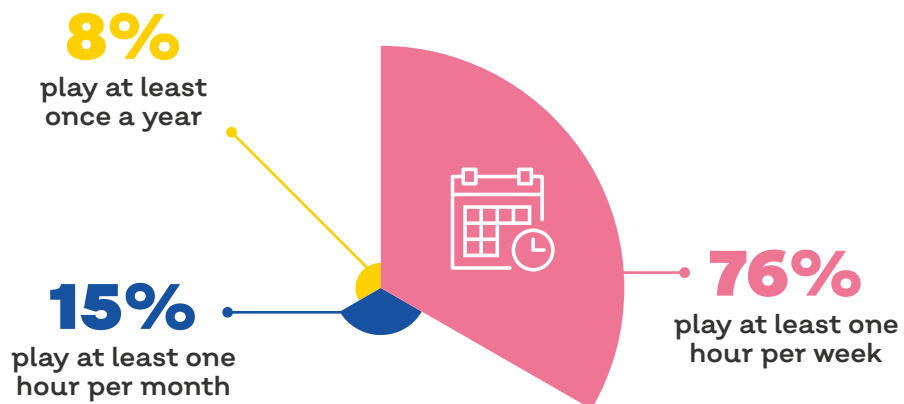


AMONG VIDEO GAME PLAYERS



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

EUROPEAN VIDEO GAME PLAYER HOW WE PLAY



ON AVERAGE, PEOPLE IN EUROPE SPEND



9.5h/week
average time spent playing video games*



14h/week
average time spent on social media**



23.5h/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

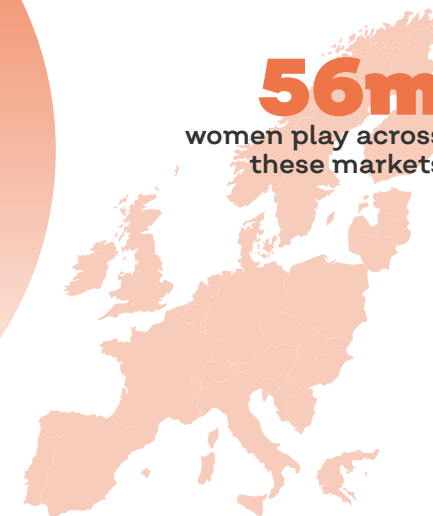
***EU audiovisual observatory, Yearbook 2020-2021

WOMEN & VIDEO GAMES



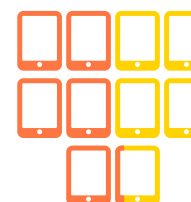
47%
of European video game players are **women**
(up from 45% in 2019)

56m
women play across these markets



AMONG VIDEO GAME PLAYERS

Women represent
53%
of all mobile and tablet video game players



32 years old
is the average age of a female player

Girls who play video games are
3x more likely to pursue a STEM career than girls who don't*

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.

RESPONSIBLE GAMEPLAY



PEGI is the pan-European video game age rating system. PEGI's goal is to educate consumers, particularly parents, in order to protect minors from potentially inappropriate game content. PEGI also ensures that games are sold and advertised responsibly, that consumer redress is available, and that online game playing environments are kept 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.

Visit www.pegi.info for more information and download the PEGI app for iOS/Android.

38+
European countries

2,400
member companies

35,000+
games and millions of apps classified

PEGI'S NEW FEATURES AND SERVICES TO SUPPORT PARENTS

PEGI app



PEGI's easy-to-use app helps parents in local languages across Europe. Available for both iOS and Android, information about a game is just a click away.

In-game purchase transparency



Includes Paid Random Items



Includes Paid Random Items

PEGI's enhanced in-game purchase descriptor informs consumers if an in-game purchase includes paid random items.

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



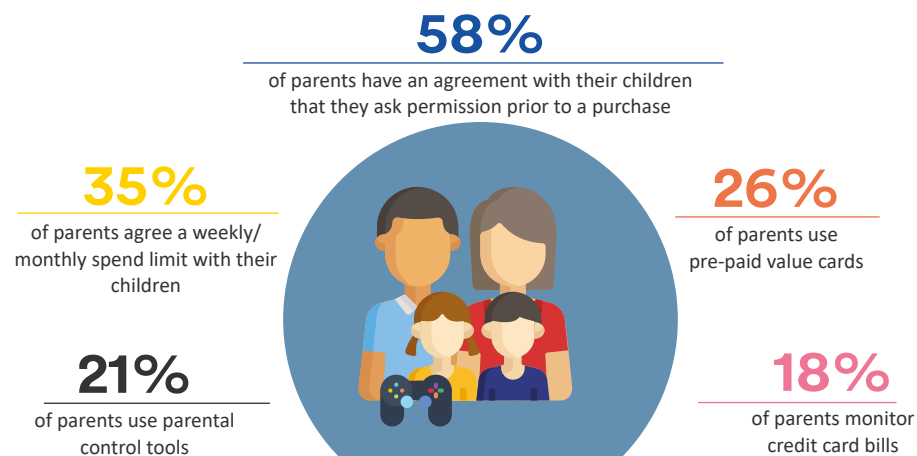
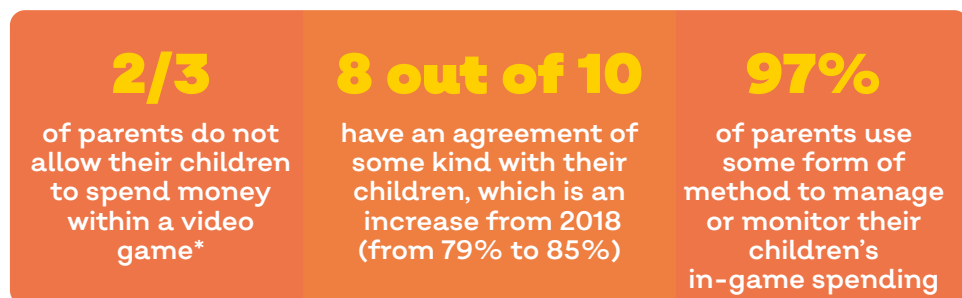
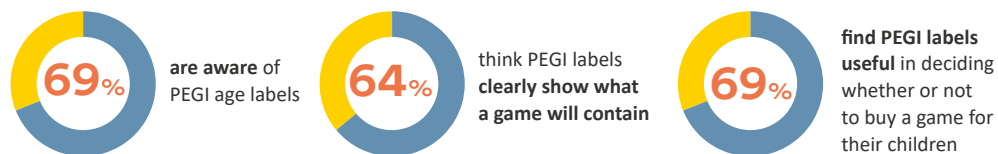
Video game companies are committed to providing parents and children with the highest level of information to ensure safe and responsible gameplay and PEGI is constantly adapting its classification system to new trends



PARENTAL SUPERVISION

CLASSIFICATION SYSTEMS SUCH AS PEGI ARE ESSENTIAL TO HELP PARENTS CHOOSE SUITABLE GAMES FOR THEIR CHILDREN

Among parents with children who play video games

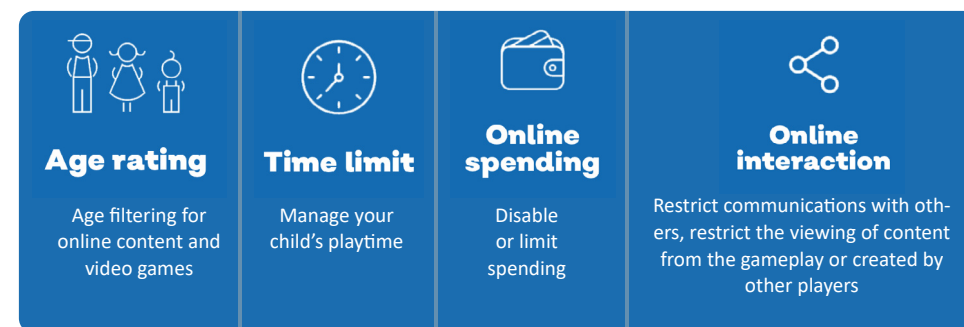


Need more information about player and parents controls? Check out <https://www.isfe.eu/responsible-gameplay/>

* GameTrack in-game spending survey November 2019 by Ipsos MORI, commissioned by ISFE.

PLAYER AND PARENTAL CONTROL TOOLS

In addition to 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:



LIST OF DEVICES OFFERING PARENTAL CONTROL TOOLS



On ISFE's website you can access player and parental control tools for various devices, platforms player and parental controls.

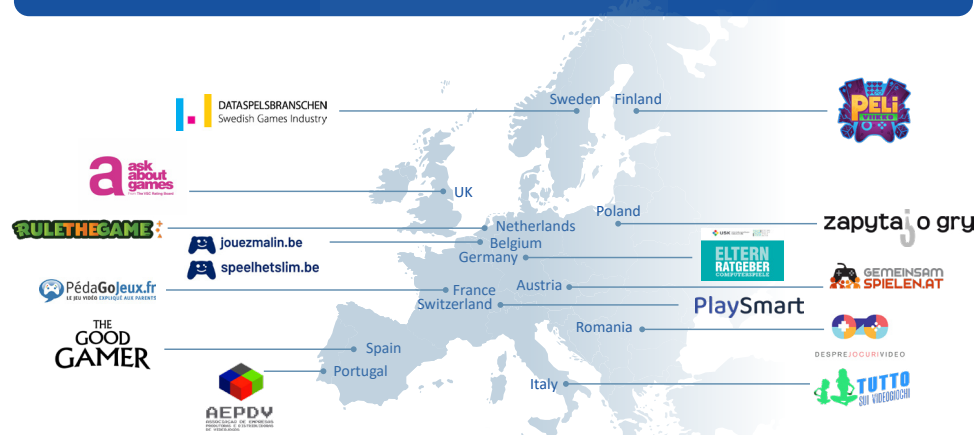
Check out <https://www.isfe.eu/responsible-gameplay/parental-controls/>

GUIDANCE ACROSS EUROPE

To provide **tips and guidance** to parents on how to engage

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



Austria
GemeinsamSpielen
www.gemeinsamspielen.at

Belgium
Jouezmalin /
Speelhetslim
www.jouezmalin.be
www.speelhetslim.be

Finland
Peliviikko
www.peliviikko.fi

France
PédagoJeux
www.pedagojeux.fr

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

Italy
Tutto sui videogiochi
www.tuttosuivideogiochi.it

Netherlands
RuleTheGame
www.rulethegame.nl

Poland
Zapytaj o Gry
www.zapytajogry.pl

Portugal
#SaberJogar
Coming soon

Romania
Despre
desprejocurvideo.ro

Spain
The Good Gamer
www.thegoodgamer.es

Sweden
Fråga, Prata, Spela
www.fragaprataspela.se

Switzerland
PlaySmart
play-smart.ch

United Kingdom
Ask about games
www.askaboutgames.com



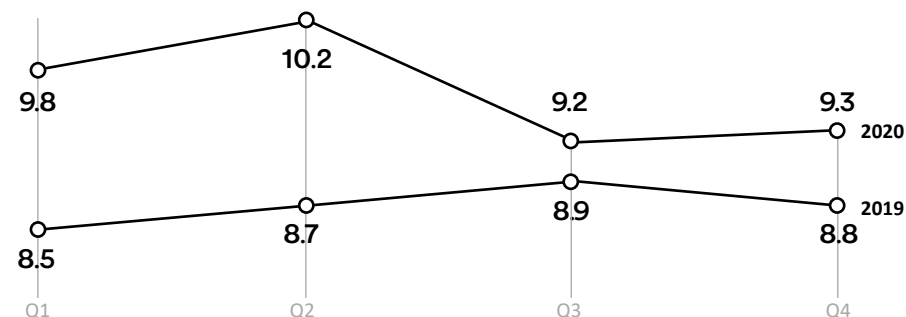
ISFE's 5 tips for parents
<https://www.isfe.eu/news/5-tips/>

VIDEO GAMEPLAY DURING COVID-19 LOCKDOWN



Though playtime increased during lockdown, it decreased as lockdown measures were lifted

PLAYTIME IN HOURS PER WEEK



Playing multiplayer online games helped people feel less isolated.

20% of parents played more with their children during lockdown.

● All players ● Multiplayer online

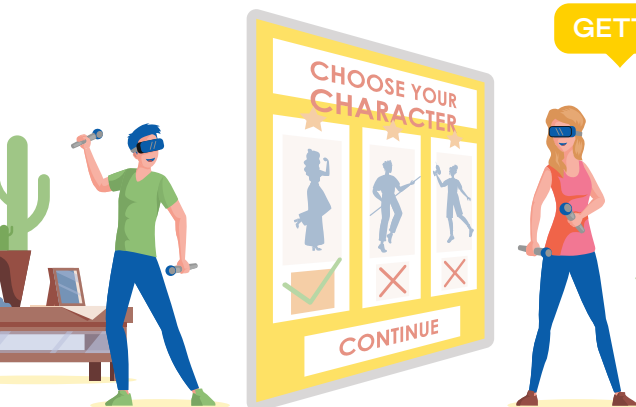
32% **49%**
...has helped me to feel happier

29% **42%**
...made me feel less anxious

26% **46%**
...has helped me to feel less isolated

26% **49%**
...has helped me to stay connected with friends

SOME OF THE CONTRIBUTIONS OF THE INDUSTRY DURING THE PANDEMIC



GETTING FIT WITH GAMES

- Ubisoft offered free trials in Just Dance.
- Niantic updated its mobile games Pokémon GO and Harry Potter: Wizards Unite to encourage exercising at home.
- Nintendo mixed things up with a unique music-based mode to get your body moving to 17 beloved songs from the likes of Super Mario Odyssey, The Legend of Zelda: Breath of the Wild, Splatoon 2, and more.

LEARNING USING GAMES

- Roblox introduced a new Teaching Remotely resource.
- Microsoft added free educational resources to its Minecraft Marketplace.

🔗 Check out initiatives of our national members on <https://www.isfe.eu/games-in-society/covid-19/>



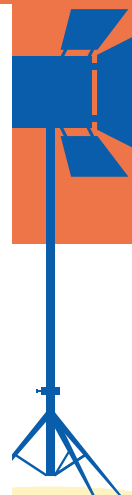
#PLAYAPARTTOGETHER
CAMPAIGN

The #PlayApartTogether campaign encouraged players to follow health and safety guidelines for COVID-19 from the World Health Organization

medium.com/@playaparttogether

SUPPORTING OTHER CULTURAL AND CREATIVE SECTORS THROUGH GAMES

- US rapper Travis Scott performed a live set of his "Astronomical" album. Over 27.7 million unique players participated.
- The Museum of Angers organised virtual tours on Animal Crossing: New Horizons.



🔗 Check out more examples on <https://www.isfe.eu/games-in-society/covid-19/>

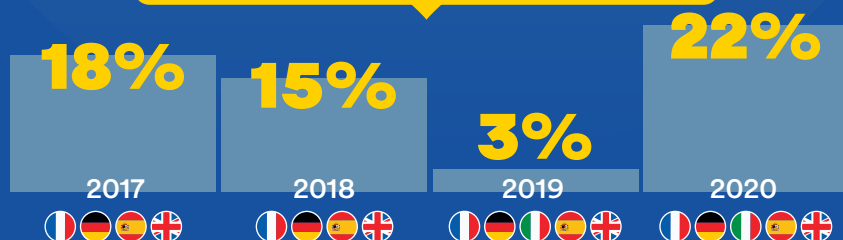
EUROPEAN VIDEO GAMES INDUSTRY

€23.3bn

Total European market size*



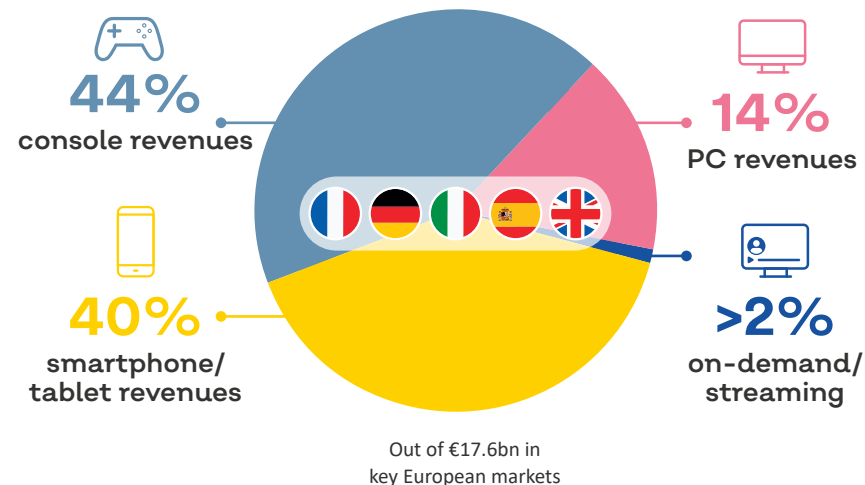
YEAR-ON-YEAR INCREASE IN REVENUE



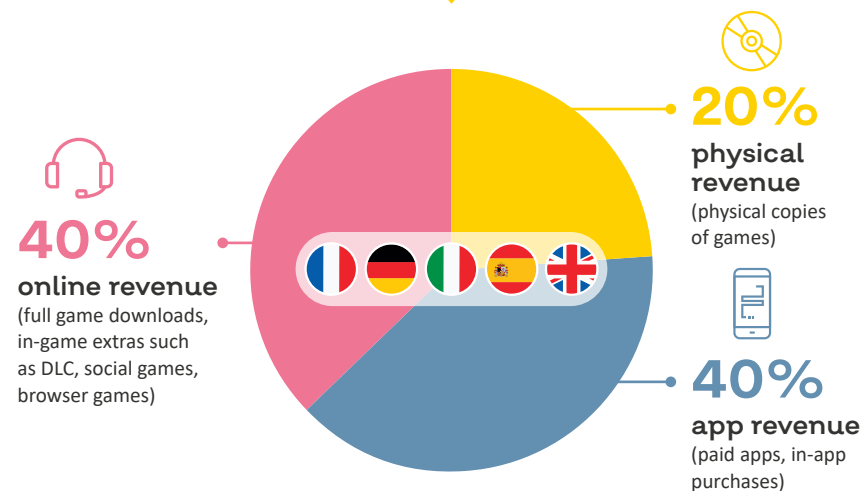
Sources: GameTrack data, provided by IPSOS MORI and commissioned by ISFE.

* Market size data is extrapolated from GameTrack 2020 report and Newzoo 2020 Global Data Report

REVENUE SPLIT BY DEVICE, IN KEY EUROPEAN MARKETS, IN 2020



REVENUE SPLIT BY SOURCE, IN KEY EUROPEAN MARKETS, IN 2020



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

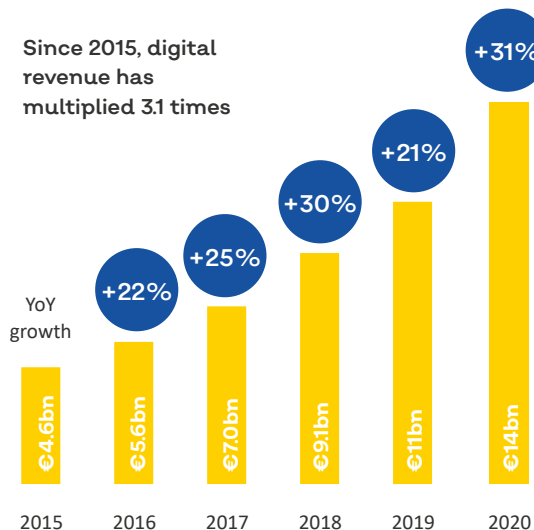
SPOTLIGHT ON DIGITAL ENVIRONMENT

REVENUE GENERATED BY THE DIGITAL ECOSYSTEM IN KEY EUROPEAN MARKETS



Data for Italy is only included for 2019 and 2020.
Digital revenue is made up of online and app revenues.

Since 2015, digital revenue has multiplied 3.1 times



64% (vs 66% in 2019)
In-game extras, additional downloadable content for games already bought

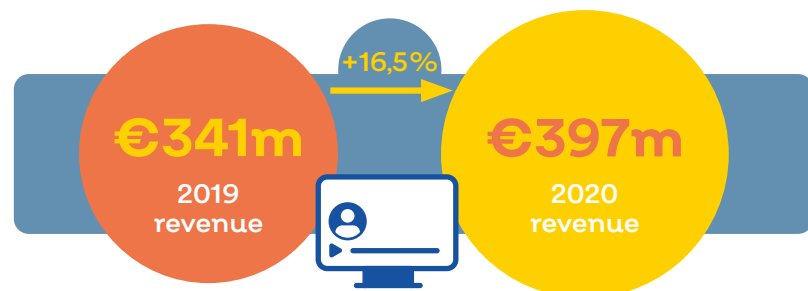


25% (vs 21% in 2019)
Full game downloads



11% (vs 13% in 2019)
Subscription services and social games

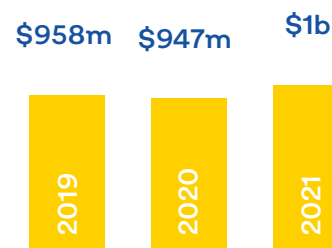
REVENUE GENERATED BY ON-DEMAND/STREAMING SERVICES



SPOTLIGHT ON ESPORTS

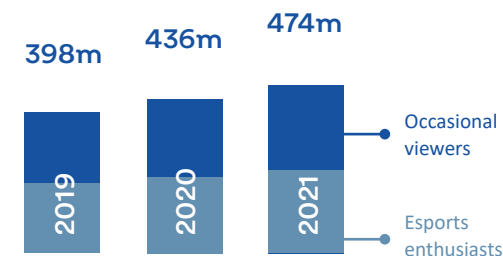
ESPORTS ARE WORTH*

Esports global revenues suffered a contraction in 2020 but they are expected to grow again in 2021.



VIEWERS DURING COVID-19

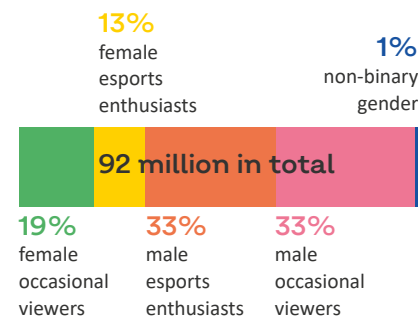
In contrast, the global audience grew during the pandemic and it is expected to keep growing.



Established in 2019, ISFE Esports brings together ISFE's wider games publisher and national trade association membership as well as major tournament organiser ESL, Twitch and Riot Games.

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

AUDIENCES IN EUROPE**



TOP TITLES IN EUROPE***

- 1 League of Legends
- 2 Counter-Strike: Global Offensive
- 3 Overwatch
- 4 Call of Duty
- 5 Valorant

Sources:

*Newzoo (2021). Global Esports & Live Streaming Market Report.

**Newzoo and PayPal (2020). Europe and Esports: High Engagement and Even Higher Potential.

*** Based on esports audience. Provided by Newzoo.

TOP SELLING GAMES OF 2020*



FIFA 21
Electronic Arts



Grand Theft Auto V
Rockstar Games



FIFA 20
Electronic Arts



Call of Duty: Black Ops Cold War
Activision Blizzard



Animal Crossing: New Horizons
Nintendo



Tom Clancy's Rainbow Six Siege
Ubisoft



Call of Duty: Modern Warfare
Activision Blizzard



Assassin's Creed Valhalla
Ubisoft



Red Dead Redemption 2
Rockstar Games

86,953

employees in 2019

compared to
77,916 in 2018

LARGEST EMPLOYEE BASES IN EUROPE (2019)

Sweden:
5,925

Poland:
7,800

Germany:
10,487

France:
15,000

Romania:
6,000

Spain:
9,500

WOMEN EMPLOYED IN EUROPE

20.38%

of estimated
employees are women

*Full game sales by unit tracked by Global Sales Data (GSD), sorted by rank for 2020, Retail and Network combined. This listing does not include Nintendo digital sales data.

Source: 2019 EGDF and ISFE Industry Insights Report. The report includes data on the number of employees in European countries such as Belgium, Bulgaria, Czechia, Denmark, Finland, France, Germany, Greece, Latvia, Lithuania, Ireland, Italy, Netherlands, Norway, Poland, Portugal, Romania, Serbia, Slovakia, Slovenia, Spain, Sweden, UK.



4,282
participants

96%
said they will
use learnings in
everyday work

73
countries

For the sixth year in a row, European Schoolnet, the network of 34 Ministries of Education across Europe and ISFE are continuing their Games in Schools project designed to train teachers and educators across Europe on how to use video games as pedagogical support in the classroom.

The project's outputs included a 6-week long Massive Open Online Course (MOOC) (see below) about Games in Schools, a selection of teacher-created lesson plans, and a handbook for teachers on using video games for educational purposes.

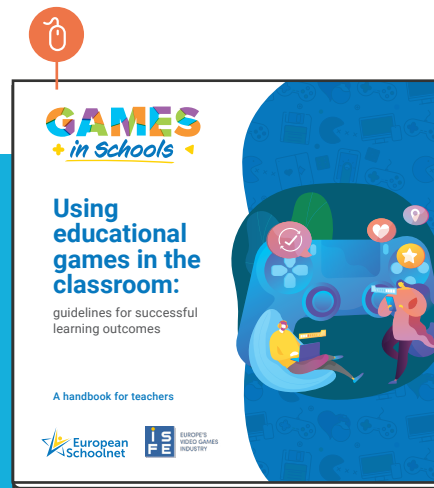
MODULES OF THE MASSIVE OPEN ONLINE COURSE (MOOC)

- | | | |
|--|---|---|
| <p>1 Why use computer games in the classroom?</p> | <p>2 Using games for thematic learning</p> | <p>3 Learning games</p> |
| <p>4 What can we learn from games?</p> | <p>5 Designing games</p> | <p>6 Why is it important to teach about games?</p> |

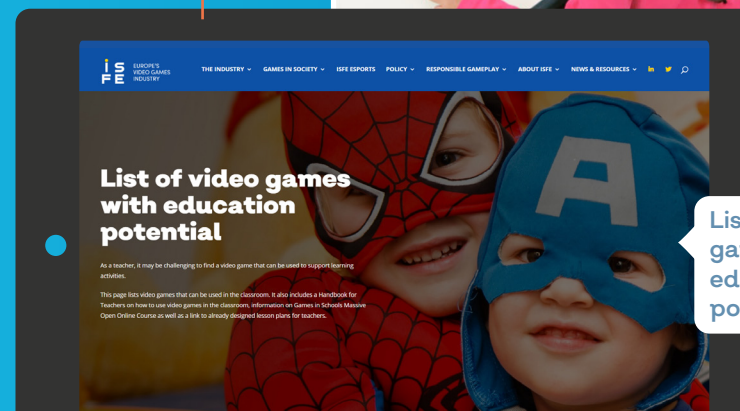
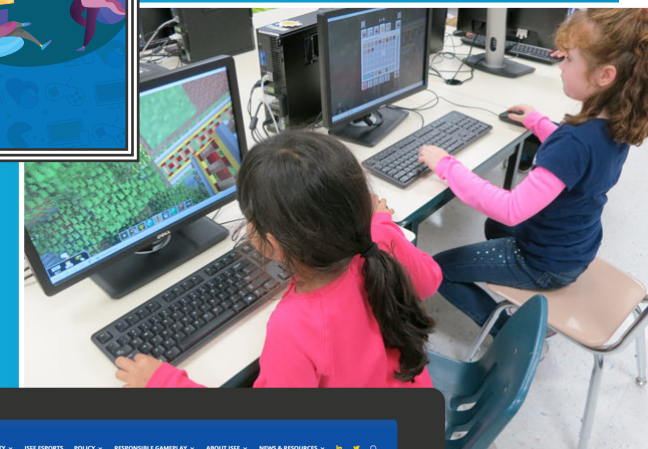


HANDBOOK FOR TEACHERS

Available in English, Italian, Polish, Romanian and Spanish



In 2020, the governments of Poland and of Belgium's Flanders region became the first in Europe to integrate video games into mainstream education.



List of video games with educational potential



DIVERSITY PLEDGES ACROSS EUROPE

In early 2021, ISFE and EGDF established a Diversity Working Group with the goals of committing to advancing gender equality and diversity in the industry, promoting ongoing efforts of our members, and serving as a resource for information on diversity-related policy and legislative issues. Below are a few of our member initiatives:



- SELL and SNJV, representing the French video games sector signed Diversity Charter alongside Women in Games, France to promote diversity within the French games industry.
- Launched Women in Games (FR) Diversity Guide.

womengamesfrance.org



Over 400 companies and more than 1,000 individuals have already signed a joint declaration to actively support diversity and inclusion in the video games industry and became part of #TeamDiversity in Germany.

hier-spielt-vielfalt.de/en



- 140+ pledge partners and supporters have signed up.
- #RaiseTheGame is designed to inspire meaningful, cultural and behavioural change in all games businesses, companies and organisations, regardless of size or stage of their equality, diversity and inclusion (EDI) journey.

raisethegame.com



Diversi is a project dedicated to increasing diversity in the Swedish video games industry. Scholarships for female game students to attend Game Developers Conference, a networking event at Nordic Game, are among its activities.

diversi.nu

AEVI, the Spanish video games association, has compiled all local initiatives in the field of equality, diversity, inclusion that are being carried out by companies in Spain.

Diversity and equality plan coming soon.



ISFE becomes a corporate ambassador of Women in Games

A not-for-profit looking for equity and parity for all women and girls in the video games industry and esports.

CLIMATE COMMITMENT

The video game industry shares the European Union's belief that addressing climate change is one of the most critical challenges of the 21st century. As a result it has taken numerous initiatives to protect the environment and is striving to improve the energy efficiency of its devices and services.



Green Games Guide

In early 2021, Ukie collaborated with Games London and the UN's Playing for the Planet Alliance to develop a Green Games Guide to assist businesses in thinking about how they can improve their approach to sustainability.

ukie.org.uk/greengamesguide



A Climate Handbook for Game Companies

PlayCreateGreen was founded in 2019 by a group of leading Nordic game companies to assist video game companies in effecting real change by sharing knowledge essential to achieve climate neutrality.

playcreategreen.org



Playing for the Planet Alliance

During the 2021 EU Green Week, ISFE became Associate Member of the UN-facilitated Playing for the Planet Alliance.

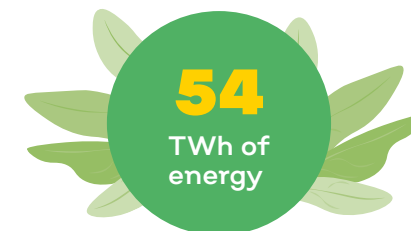
playing4thepoint.org

Raising environmental awareness through video games:

Many video game studios are working on incorporating new features in and out of their games, such as modes, maps, themed events, storylines and messaging that highlight environmental themes like conservation restoration.

Enhancing the sustainability of video game consoles:

In 2015, Nintendo, Sony Interactive Entertainment and Microsoft launched the Games Consoles Voluntary Agreement (GCVA) together with the European Commission, to improve energy and resource efficiency of current and future games consoles.



GCVA saved over the lifetime of PS4 and Xbox One series consoles*

(equivalent to Greece's annual electricity production in 2019).

Source: * Zimmermann, T. et al., Review Study of the Ecodesign Voluntary Agreement for the Product Group "Videogames Consoles", 2019, pp. 154-155.

MEMBERS

ISFE EGDF

Video game companies

- Activision Blizzard ⓘ
- Bandai Namco ⓘ
- Electronic Arts ⓘ
- Embracer Group ⓘ
- 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 ⓘ PGDA ⚙
- Belgium: VGFB ⓘ FLEGA ⚙
- Czechia: GDACZ ⚙
- Denmark: Producentforeningen ⚙
- Finland: Neogames ⚙
- France: S.E.L.L. ⓘ SNJV ⚙
- Germany: game ⓘ game ⚙
- Italy: IIDEA ⓘ IIDEA ⚙
- Netherlands: VGFN ⓘ DGA ⚙
- Nordic (Denmark, Finland, Norway, Sweden): ANGI ⓘ
- Norway: VIRKE ⚙
- Poland: SPIDOR ⓘ PGA ⚙
- Portugal: AEPDV ⓘ
- Romania: RGDA ⚙
- Serbia: SGA ⚙
- Slovakia: SGDA ⚙
- Spain: AEVI ⓘ DEV ⚙
- Sweden: Spelplan-ASGD ⚙
- Switzerland: SIEA ⓘ
- Turkey: TOGED ⚙
- United Kingdom: Ukie ⓘ TIGA ⚙

ABOUT ISFE

ISFE represents the video games industry in Europe and is based in Brussels, Belgium. Our membership comprises national trade associations in 18 countries across Europe which represent in turn thousands of developers and publishers at national level. ISFE also has as direct members the leading European and international video game companies.

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✉ info@isfe.eu

📍 Rue Guimard 15, 1040 Brussels

🌐 EU transparency Register ID: 20586492362-11

🐦 @ISFE_Games

🌐 LinkedIn page

ABOUT EGDF

EGDF represents European game developers on a European level, helping to build up policies that support the growth of the European game developer studios and foster the development of the entire digital ecosystem in Europe.

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