EDITORIAL

from Olaf Coenen, ISFE Chairman

The video games industry represents one of Europe’s most compelling economic success stories, and is the fastest growing segment of its creative industries, experiencing a 15% growth rate in key European markets. Europe’s games ecosystem has spawned generations of technological and creative talent that continue to set new standards in innovation, artistry and immersive storytelling. With a turnover of €21bn in 2018, the video games industry is a leading contributor to Europe’s digital future.

The industry’s track record for pushing boundaries continues to redefine entertainment, generate new business models, and deliver technologies with wide-ranging cross-over potential. Video games deliver experiences that enrich the everyday cultural lives of more than 54% of all Europeans, and inspire new ways of understanding and interacting with the world around us. No other form of creative expression so uniquely combines technical and artistic disciplines in ways that allow audiences to actively participate in the story.

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

Dr. Olaf Coenen, ISFE Chairman
Vice President International Publishing for Europe and Latin America, Electronic Arts
EU market size of €21bn*

+15% year on year (YoY)

Increase in key European markets

Revenue split by device in key European markets

* Market size data is extracted from Newzoo | 2018 Global Games Market

18% is driven by PC revenues

34% is driven by mobile/tablet revenues

2% is driven by handheld revenues

47% is driven by console revenues

Market size of €12.3bn

Sources: ISFE data, extracted from GameTrack (covering France, Germany, Spain and the UK) and GSD 2018 reports
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...)

**Market size of €12.3bn**

**Key Trends**

**Mobile & App ecosystem**
- **+19%** growth YoY
- MOBILE & APP REVENUE is driven by:
  - 97% in-app purchases
  - 3% paid apps

**Online revenue split**
- **+40%** growth YoY
- 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

**Sources:** ISFE data, extracted from GameTrack (covering France, Germany, Spain and the UK) and GSD 2018 reports
**Esports**

**Esports Global Audience**

In 2018, 395M people (*+17.8% YoY*) reached ecommerce.

Out of those 395M people:

- 44% (173m) are **Esports Enthusiasts**
- 56% (222m) are **Occasional Viewers**

**Esports Global Revenue**

Was $655M in 2017, +32% YoY, reached $865M in 2018.

**Sources:** Newzoo | 2019 Global Esports Market Report

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**Top Selling Games of 2018, by Units:**

1. **FIFA 19**
   - Electronic Arts

2. **Red Dead Redemption 2**
   - Rockstar Games

3. **Call of Duty: Black Ops 4**
   - Activision Blizzard

4. **Grand Theft Auto V**
   - Rockstar Games

5. **FIFA 18**
   - Electronic Arts

6. **Far Cry 5**
   - Ubisoft

7. **Spider-Man**
   - Sony Interactive Entertainment

8. **Assassin's Creed Odyssey**
   - Ubisoft

9. **God of War**
   - Sony Interactive Entertainment

10. **Tom Clancy’s Rainbow Six Siege**
    - Ubisoft

**Sources:** ISFE data, extracted from GameTrack (covering France, Germany, Spain and the UK) and GSD 2018 reports
In key European markets

- 54% of the population aged 6-64 play video games
- 77% of them play at least one hour per week (weekly gamers)
- 16% of them play at least one hour per month (monthly gamers)
- 7% of them play at least once a year (yearly gamers)

Share of gamers among the whole population, by age group

- 76% aged 6-10
- 84% aged 11-14
- 74% aged 15-24
- 67% aged 25-34
- 49% aged 35-44
- 34% aged 45-64

Sources: ISFE data, extracted from GameTrack (covering France, Germany, Spain and the UK) and GSD 2018 reports
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

Among gamers:

- 50% play on consoles
- 17% play on handhelds
- 56% play on computers
- 48% play on Smartphones
- 27% play on tablets
- 17% play on all of those devices

Sources: ISFE data, extracted from GameTrack (covering France, Germany, Spain and the UK) and GSD 2018 reports
Women & video games

46% of EU gamers are women

Among female gamers:

- 44% play on consoles
- 54% play on computers
- 63% play on smartphones and tablets

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*


Sources: ISFE data, extracted from GameTrack (covering France, Germany, Spain and the UK) and GSD 2018 reports
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, that opportunities for consumer redress are available, and that online gaming 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 of European harmonisation in the field of protection of minors and consumer transparency.

Learn more about PEGI at www.pegi.info

Age labels

- **3**: Suitable for all age groups, no inappropriate content.
- **7**: May contain some non-realistic or implied violence, and scenes that might be frightening to younger children.
- **12**: Can feature realistic violence against fantasy characters, non-realistic violence against humanlike characters, mild bad language, or sexual innuendo.
- **16**: May depict realistic violence against humanlike characters, bad language, use of drugs, or erotic nudity.
- **18**: Games that contain gross violence, against defenceless characters, glamorisation of drugs, or explicit sexual activity.
Video games companies are committed to offer parents and children the highest level of information to ensure safe and responsible gameplay.

Sources: PEGI data
Parents and children
(% of gaming parents who also play with their child/children)

- Play together in cooperation on the same screen: 28%
- Play together in cooperation on different screens/online: 18%
- Play competitively on the same screen: 26%
- Play competitively on different screens/online: 17%

Titles played by parents with their children
(% of gaming parents who play each title with their child/children)

- FIFA: 31%
- Minecraft: 13%
- Fortnite: 12%
- PUBG: 4%
- Overwatch: 3%

Sources: ISFE data, extracted from GameTrack (covering France, Germany, Spain and the UK) and GSD 2018 reports
Parental control tools

Besides self-regulatory classification systems, the video games industry offers parents several tools to monitor the gaming habits of their children. With every gaming device, it is now possible to set up parental control tools which regulate:

- **AGE RATING:** age filtering for online content and video games
- **TIME LIMIT:** manage your child’s playtime
- **ONLINE INTERACTION:** restrict communications with others, restrict the viewing of content from gameplay or from that created by other players
- **ONLINE SPENDING:** disable or limit spending

### List of devices offering parental control tools

- **PLAYSTATION 3**
- **PLAYSTATION 4**
- **XBOX 360**
- **XBOX ONE**
- **WII U**
- **NINTENDO SWITCH**
- **NINTENDO 3DS**
- **PS VITA**
- **PSP**
- **IPHONE/IPAD**
- **ANDROID/GOOGLE PLAY**
- **Windows**
- **macOS**
- **Windows 10**
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
Gamers are at the heart of what we do

ISFE ensures that the voice of a responsible games ecosystem is heard and understood, that its creative and economic potential is supported and celebrated, and that gamers around the world continue to enjoy great gaming experiences.

To serve Europe's games ecosystem and ensure that diversity, skill and creative talent grow in Europe

To raise the bar in harmonised self-regulation and responsible gameplaying - PEGI is a successful pan-European self-regulatory system

To build awareness and understanding of games and their value-added benefit to society and to Europe's digital strategy

To contribute to healthy economic growth in Europe by engaging with policy makers and stakeholders

ISFE is also a trusted provider of strategic data on the economics and demographics of the video games ecosystem across Europe.

Gametrack provides information on market size and on gamers’ behaviours around three metrics: Volume - Value - Demographics. Data covers Germany, France, Spain and the UK. Italy will be covered from next year.

Games Sales Data is the first video games chart providing sales data in both retail and digital markets. It publishes weekly reports of physical and digital sales in over 42 EMEA territories.
Members

Video games companies

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

National Trade Associations

Austria  |  Italy  |  Portugal
O.V.U.S.  |  A.E.S.V.I.  |  A.E.P.D.V.
Belgium  |  Netherlands  |  Spain
B.E.A. Interactive  |  NVPI Interactief  |  A.E.V.I.
France  |  NORDIC (Denmark, Finland, Norway, Sweden)  |  Switzerland
S.E.L.L.  |  ANGI  |  S.I.E.A.
Germany  |  Poland  |  United Kingdom
Game  |  SPIDOR  |  Ukie

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