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
Out of a market size of €14.0bn in key European markets

- **43%** console revenues
- **40%** mobile/tablet revenues
- **>1%** handheld revenues
- **16%** PC revenues
- **37%** online revenue (full game downloads, in-game extras such as DLCs, social games, browser games)
- **24%** physical revenue (physical copies of games)
- **39%** app revenue (paid apps, in-app purchases)

**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

Online revenue has multiplied by 2.5 since 2014

<table>
<thead>
<tr>
<th>Year</th>
<th>Revenue (€bn)</th>
<th>YoY Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>3.8</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>4.6</td>
<td>+22%</td>
</tr>
<tr>
<td>2016</td>
<td>5.5</td>
<td>+22%</td>
</tr>
<tr>
<td>2017</td>
<td>7.0</td>
<td>+25%</td>
</tr>
<tr>
<td>2018</td>
<td>9.1</td>
<td>+30%</td>
</tr>
<tr>
<td>2019</td>
<td>9.7</td>
<td>+7%</td>
</tr>
</tbody>
</table>

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

In 2019, online revenue was driven by 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

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

- 30% say they can play anywhere
- 28% say it saves time (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.
# Key Trends - Esports

## Esports is Worth*

<table>
<thead>
<tr>
<th>Year</th>
<th>Value (in $ million)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>776.4</td>
</tr>
<tr>
<td>2019</td>
<td>950.6</td>
</tr>
<tr>
<td>2020</td>
<td>1,100</td>
</tr>
</tbody>
</table>

*Expected to reach $1.1bn globally in 2020.

## 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)**

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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.

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## ISFE Esports Principles

- **Safety and well-being**
- **Integrity and fair play**
- **Respect and diversity**
- **Positive and enriching game play**

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*Sources: *Newzoo 2020 Global Esports Market

**GameTrack data, provided by IPSOS MORI and commissioned by ISFE.
TOP SELLING GAMES OF 2019

1. FIFA 20
   Electronic Arts

2. Grand Theft Auto V
   Rockstar Games

3. Call of Duty: Modern Warfare
   Activision Blizzard

4. FIFA 19
   Electronic Arts

5. Red Dead Redemption 2
   Rockstar Games

6. Tom Clancy’s Rainbow Six Siege
   Ubisoft

7. Star Wars Jedi: Fallen Order
   Electronic Arts

8. Mario Kart 8 Deluxe
   Nintendo

9. 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.

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

- 77% play at least one hour per week
- 15% play at least one hour per month
- 8% play at least once a year

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

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.

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

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

www.raisethegame.com

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

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

3
Suitable for all age groups, no unsuitable content
www.pegi.info

7
May contain some non-realistic or implied violence, and scenes that might be frightening to younger children
www.pegi.info

12
Can feature realistic violence against fantasy characters, non-realistic violence against humanlike characters, mild bad language, or sexual innuendo
www.pegi.info

16
May depict realistic violence against humanlike characters, bad language, use of drugs, or erotic nudity
www.pegi.info

18
Games that contain gross violence, against defenceless characters, glamorisation of drugs, or explicit sexual activity
www.pegi.info
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.

Sources: PEGI data
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

- 69% are aware of PEGI age labels
- 64% think PEGI labels clearly show what a game will contain
- 69% 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
- 21% of parents use parental control tools
- 26% of parents use pre-paid value cards
- 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:

**Age rating**
Age filtering for online content and video games

**Time limit**
Manage your child’s playtime

**Online spending**
Disable or limit spending

**Online interaction**
Restrict communications with others, restrict the viewing of content from the gameplay or created by other players

### LIST OF DEVICES OFFERING PARENTAL CONTROL TOOLS

<table>
<thead>
<tr>
<th>Device</th>
<th>Device</th>
</tr>
</thead>
<tbody>
<tr>
<td>Playstation 4</td>
<td>Xbox One</td>
</tr>
<tr>
<td>Nintendo Switch</td>
<td>Nintendo Switch Lite</td>
</tr>
<tr>
<td>Nintendo 3DS</td>
<td>PS Vita</td>
</tr>
<tr>
<td>Windows</td>
<td>macOS</td>
</tr>
<tr>
<td>iPhone/iPad</td>
<td>Android/Google Play</td>
</tr>
<tr>
<td>Windows 10</td>
<td>Google Stadia</td>
</tr>
</tbody>
</table>
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

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**ISFE’s 5 tips for parents**

**EUROPE**

[https://www.isfe.eu/news/5-tips/](https://www.isfe.eu/news/5-tips/)
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.

**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

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