

Key Facts

2019

**i S
F E** EUROPE'S
VIDEO
GAMES
INDUSTRY

2018
trends
& data



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.

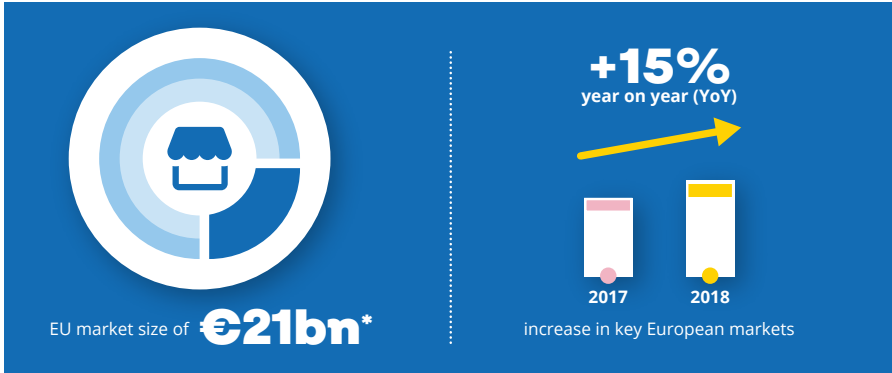
Games are at the heart of what we do. ISFE ensures that the voice of a responsible games ecosystem is heard and understood, that its creative and economic potential is supported and celebrated, and that gamers around the world continue to enjoy great gaming experiences.

Dr. Olaf Coenen, ISFE Chairman

Vice President International Publishing for Europe and Latin America, Electronic Arts

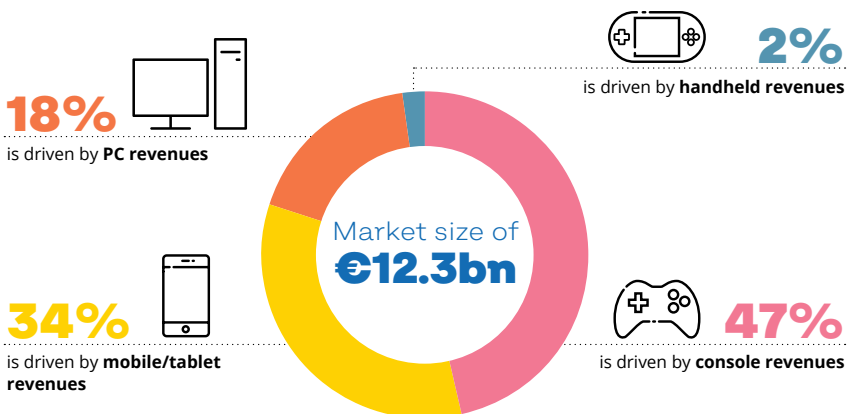


INDUSTRY

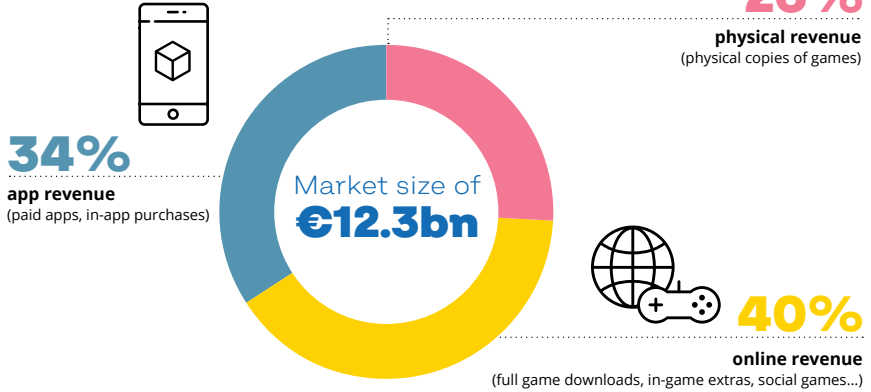


* Market size data is extracted from Newzoo | 2018 Global Games Market

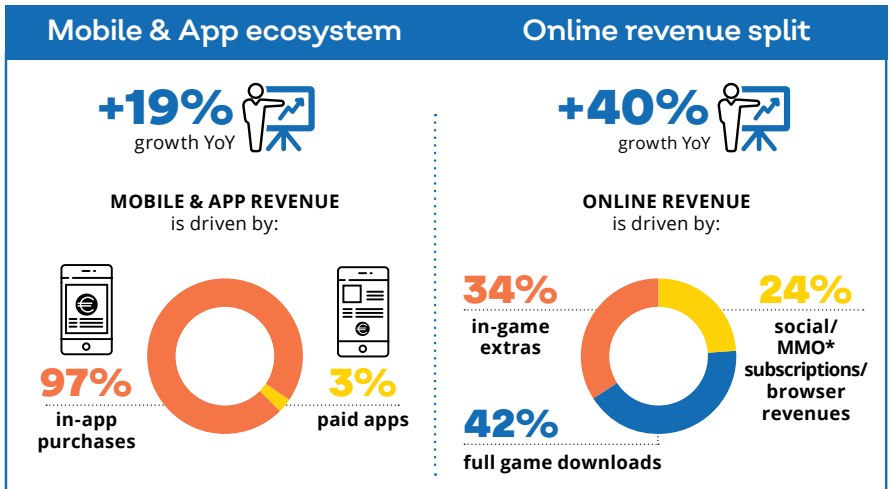
Revenue split by device in key European markets



Revenue split by turnover in key European markets



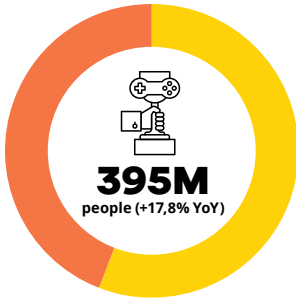
Key Trends



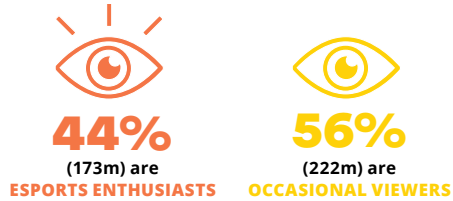
* Massively Multiplayer Online (MMO) games subscriptions refer to online games requiring a monthly subscription to be played

Esports

**ESPORTS GLOBAL AUDIENCE
IN 2018 REACHED**



OUT OF THOSE 395M PEOPLE:




ESPORTS GLOBAL REVENUE




Sources: Newzoo | 2019 Global Esports Market Report

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**




FARCRY 5
Ubisoft
- 7**




SPIDER-MAN
Sony Interactive Entertainment
- 8**



ASSASSIN'S CREED ODYSSEY
Ubisoft
- 9**



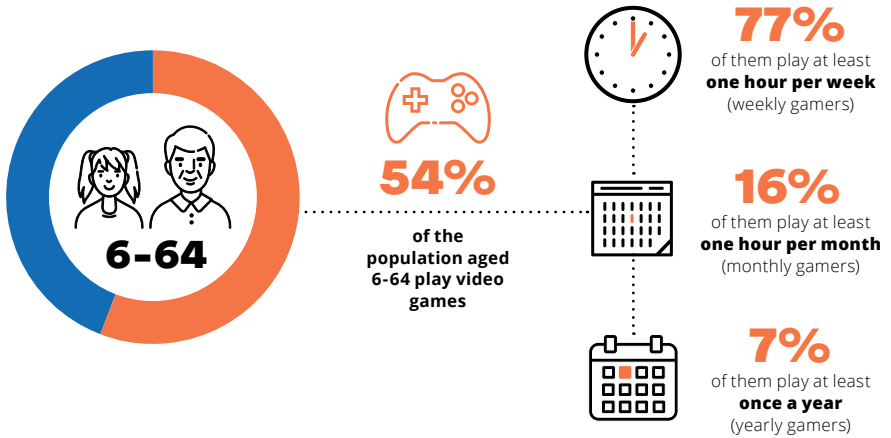
GOD OF WAR
Sony Interactive Entertainment
- 10**



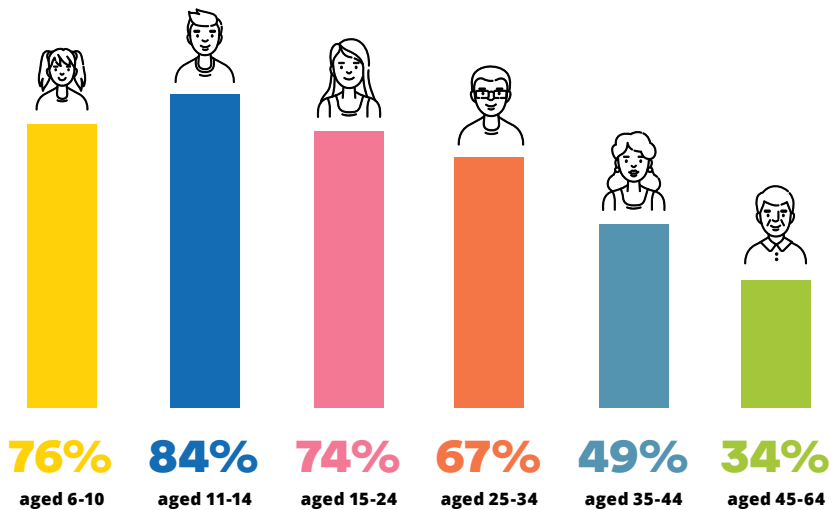
TOM CLANCY'S RAINBOW SIX SIEGE
Ubisoft

DEMOGRAPHICS

In key European markets 



Share of gamers among the whole population, by age group



THE AVERAGE AGE OF A GAMER IN THE EU IS



31
years old



25-34
is the strongest
growing age group

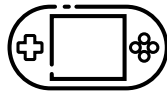


with an
8%
growth in 2018

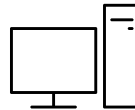
Among gamers:



50%
play on consoles



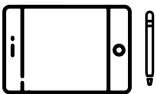
17%
play on handhelds



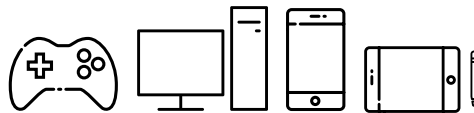
56%
play on computers



48%
play on Smartphones

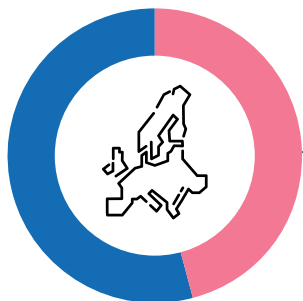


27%
play on tablets



17%
play on all of those devices

Women & video games



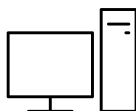
46%
of EU gamers
are women



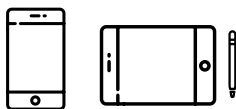
Among female gamers:



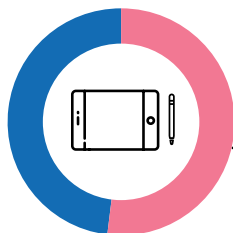
44%
play on consoles



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*

* HOSEIN Anesa, "Girls' video 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 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

+35
EUROPEAN COUNTRIES

2 200
MEMBER COMPANIES

30 000
GAMES AND MILLIONS OF APPS CLASSIFIED

Age labels



Suitable for all age groups, no inappropriate content.



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



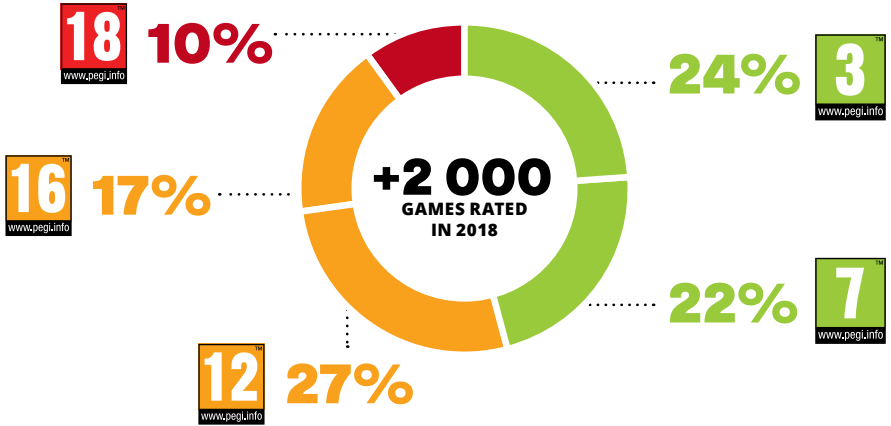
Can feature realistic violence against fantasy characters, non-realistic violence against humanlike characters, mild bad language, or sexual innuendo.



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.



Sources: PEGI data

Video games companies are committed to offer parents and children the highest level of information to ensure safe and responsible gameplay



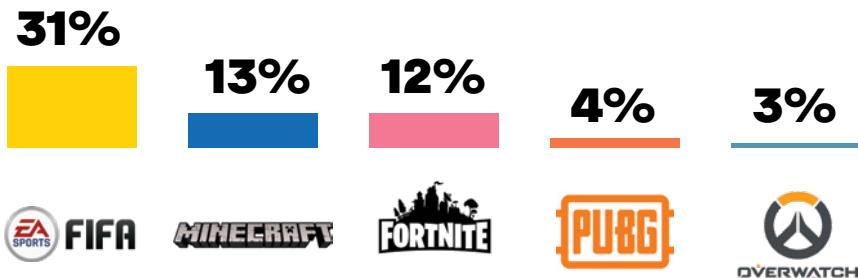
Parents and children

(% of gaming parents who also play with their child/children)



Titles played by parents with their children

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



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 DS



NINTENDO 3DS



PS VITA



PSP



**IPHONE/
IPAD**



**ANDROID/
GOOGLE PLAY**



BlackBerry



Windows



macOS



Windows 10

Educating and informing

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

Fråga Prata Spela
Tips till föräldrar om onlinespel

FRAGA, PRATA, SPELA
SWEDEN
www.fragaprataspela.se

Respektivoll in Online-Games

RESPEKTIVOLL IN ONLINE-GAMES
GERMANY
<https://bit.ly/2LuOgoN>

THE GOOD GAMER
THE GOOD GAMER
SPAIN
www.thegoodgamer.es

ask about games
From The ESRB Rating Board

ASK ABOUT GAMES
UNITED KINGDOM
www.askaboutgames.com

PédaGoJeux.fr
LE JEU VIDEO EXPLIQUÉ AUX PARENTS
PÉDAGOJEUX
FRANCE
www.pedagojeux.fr

RULE THE GAME!
THE NETHERLANDS
www.rulethegame.nl

jouezmalin.be
speelhetslim.be

JOUEZ MALIN SPEEL HET SLIM
BELGIUM
www.jouezmalin.be
www.speelhetslim.be

zapytaj o gry
ZAPITAJ O GRY
POLAND
www.zapytajogry.pl

ABOUT ISFE

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 gaming** – 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

Bandai Namco

Bungie

Electronic Arts

Microsoft

Niantic

Nintendo

Roblox

SEGA

Sony Interactive
Entertainment

Square Enix

Supercell

Take 2 Interactive

Ubisoft

Warner Bros
Interactive

ZeniMax Europe

National Trade Associations

Austria
O.V.U.S.

Belgium
B.E.A. Interactive

France
S.E.L.L.

Germany
Game

Italy
A.E.S.V.I.

Netherlands
NVPI Interactief

NORDIC
(Denmark, Finland,
Norway, Sweden)
ANGI

Poland
SPIDOR

Portugal
A.E.P.D.V.

Spain
A.E.V.I.

Switzerland
S.I.E.A.

United Kingdom
Ukie



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