

Video games in Europe:

2021 Key Facts

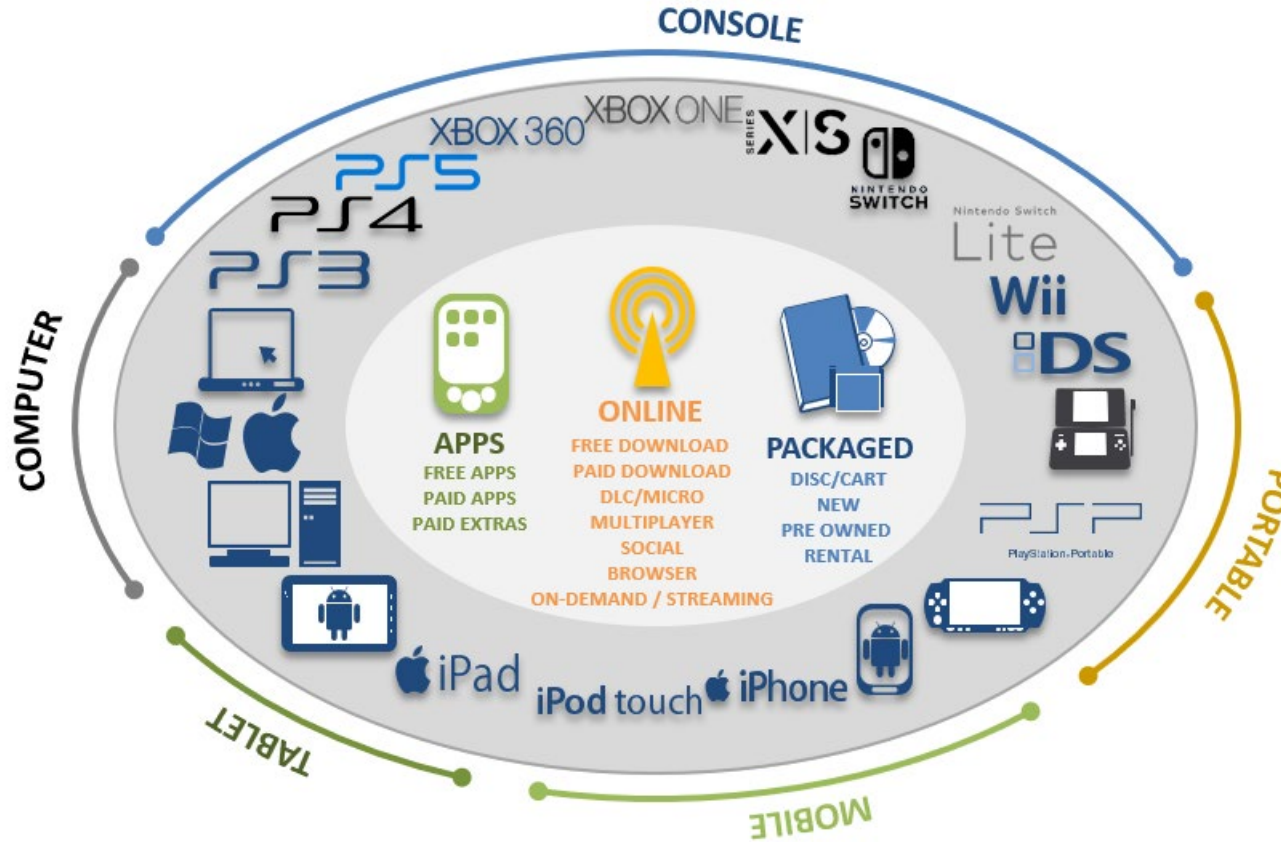
A year in review

Sep 2022



EUROPE'S VIDEO GAMES INDUSTRY

GAMETRACK



Video game reach
'The Players'

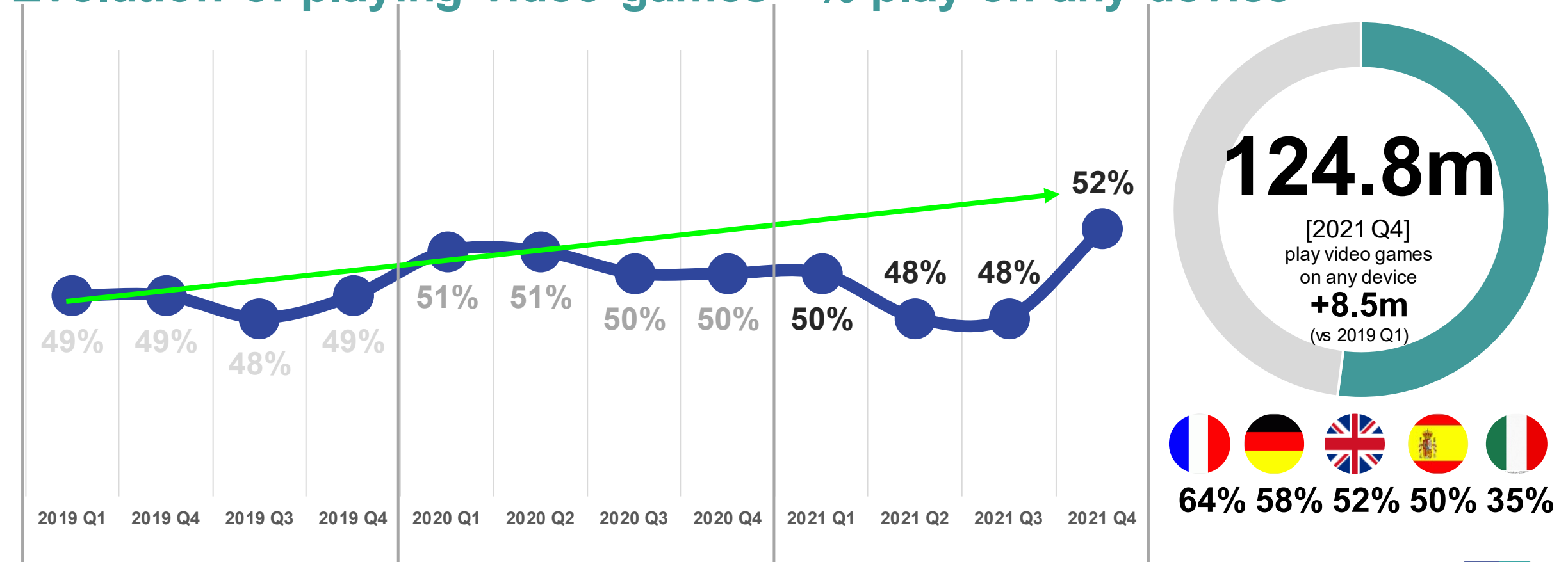
Engagement
'Play Time'

Volume & Value
'Estimated Revenue'



More than half (52%) 6-64 pop now play video games across Europe 5 – c125m players

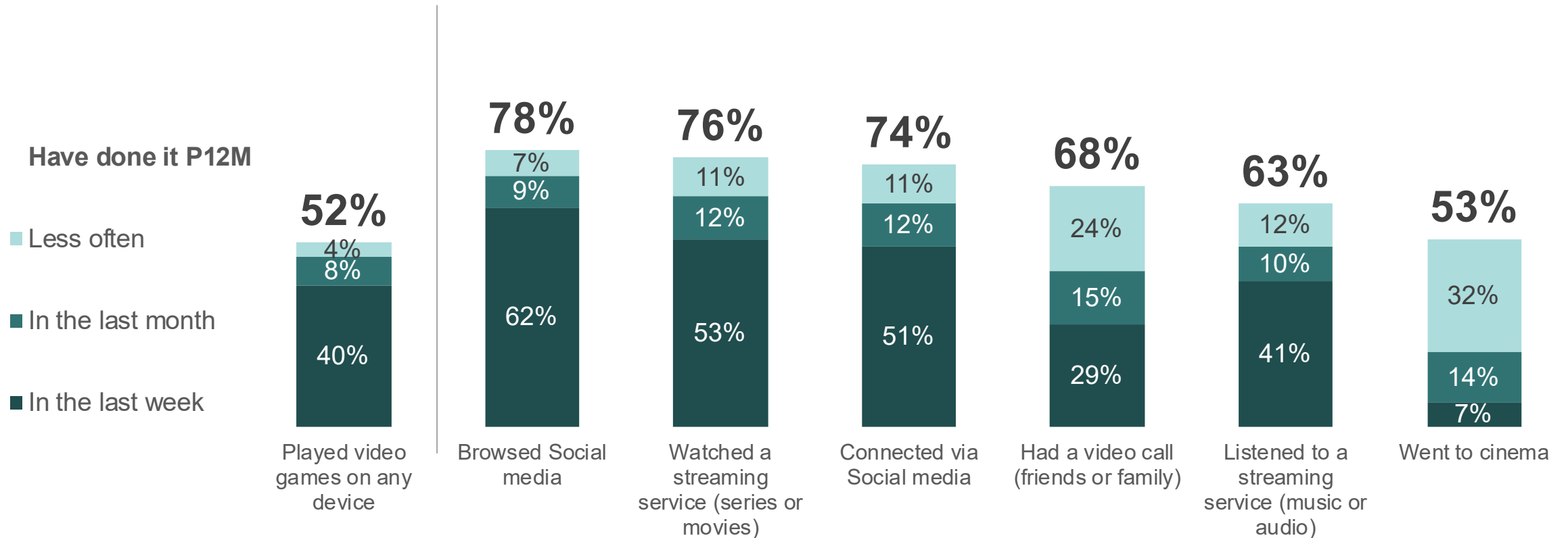
Evolution of playing video games - % play on any device



B1b. Which, if any, of the following devices do you play OFFICIAL games on, even if just occasionally?

Base: All 6-64 respondents (n=c. 15,000 per quarter)

Playing video games is as relevant as going to the cinema

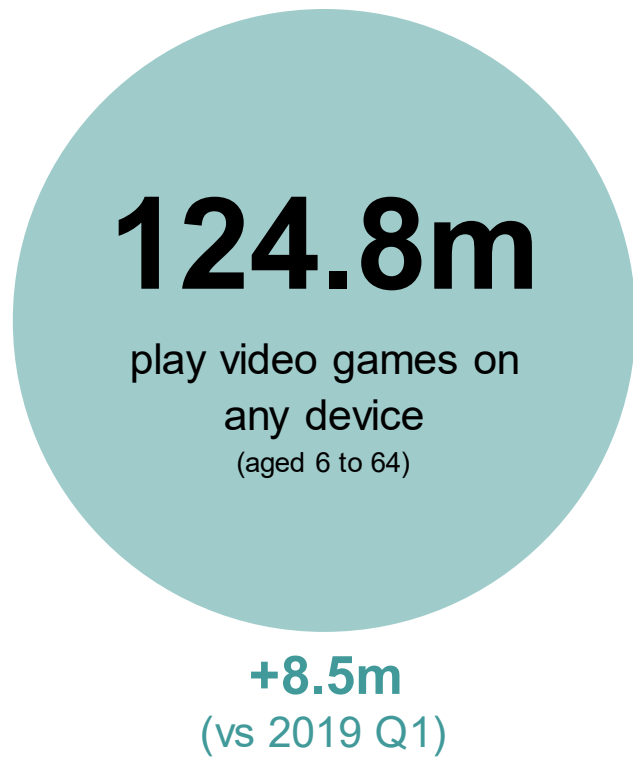


Q. When was the last time you did each of the following activities? In the last week / In the last month / In the last 3 months / In the last 6 months / In the last year / Over a year ago / I have never done this / Don't know. 'Watched a series or movie via a streaming service', 'Spoke to friends or family via video call', 'Looked at posts on social media', 'Spoke to others on social media', 'Listened to music via a music streaming service', 'Went to the cinema'. | Q. Which, if any, of the following devices do you play video games on, even if just occasionally? Please select all that apply. B02. On average, how many hours per week do you spend playing OFFICIAL games on each of these devices? Please enter a number of hours per week, or select one of the alternative options.

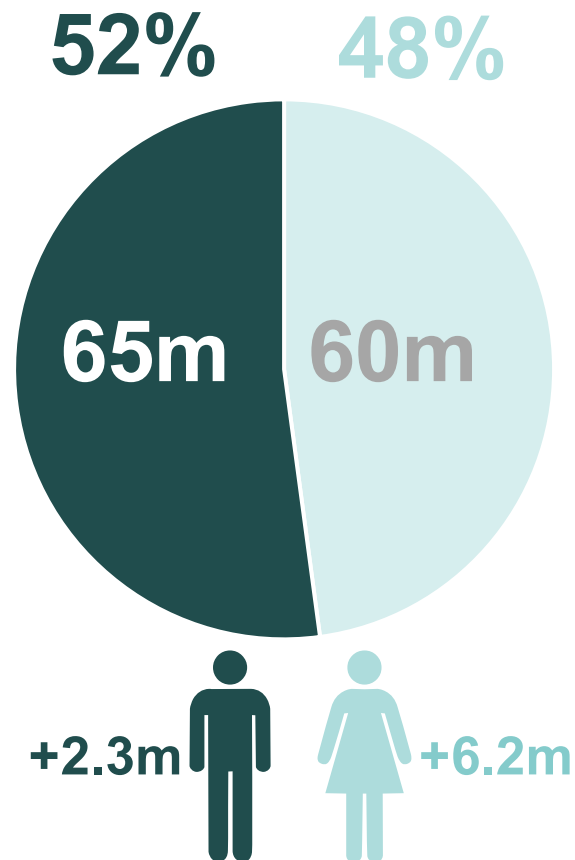
Base: All 11-64 respondents (n=c. 14,000 per quarter)

Playing video games reaches a wider and more varied audience

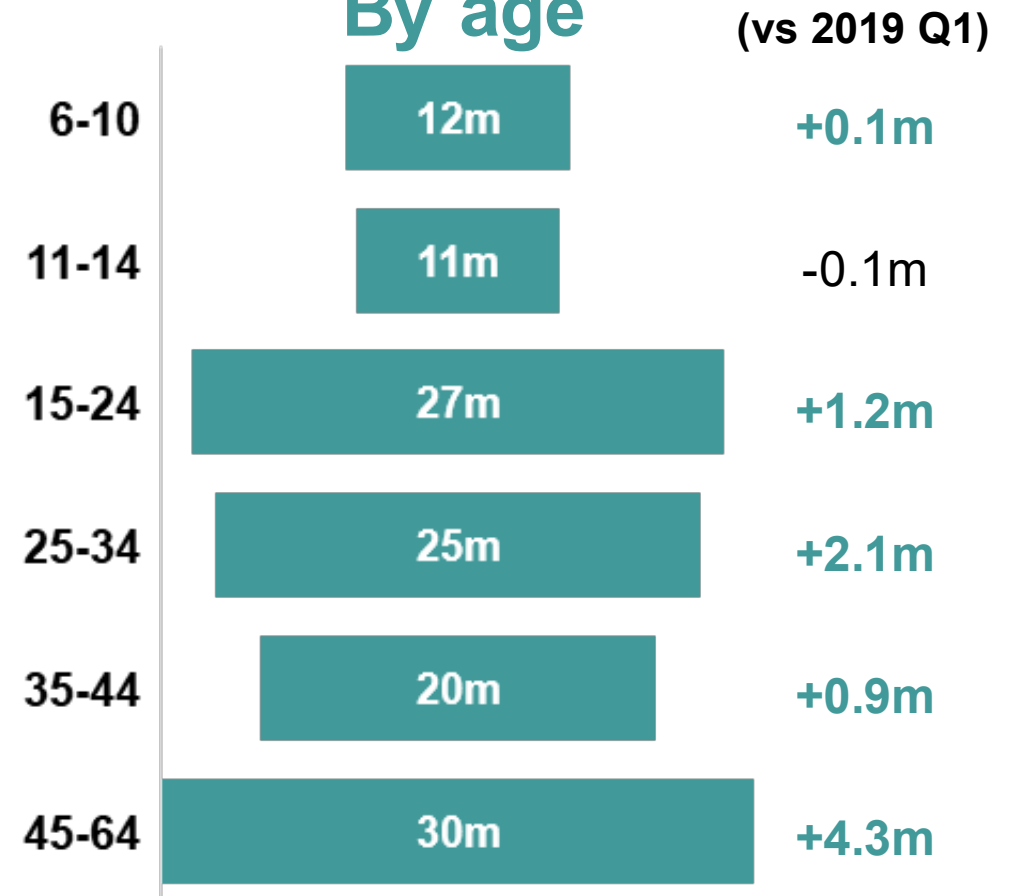
Play games



By gender



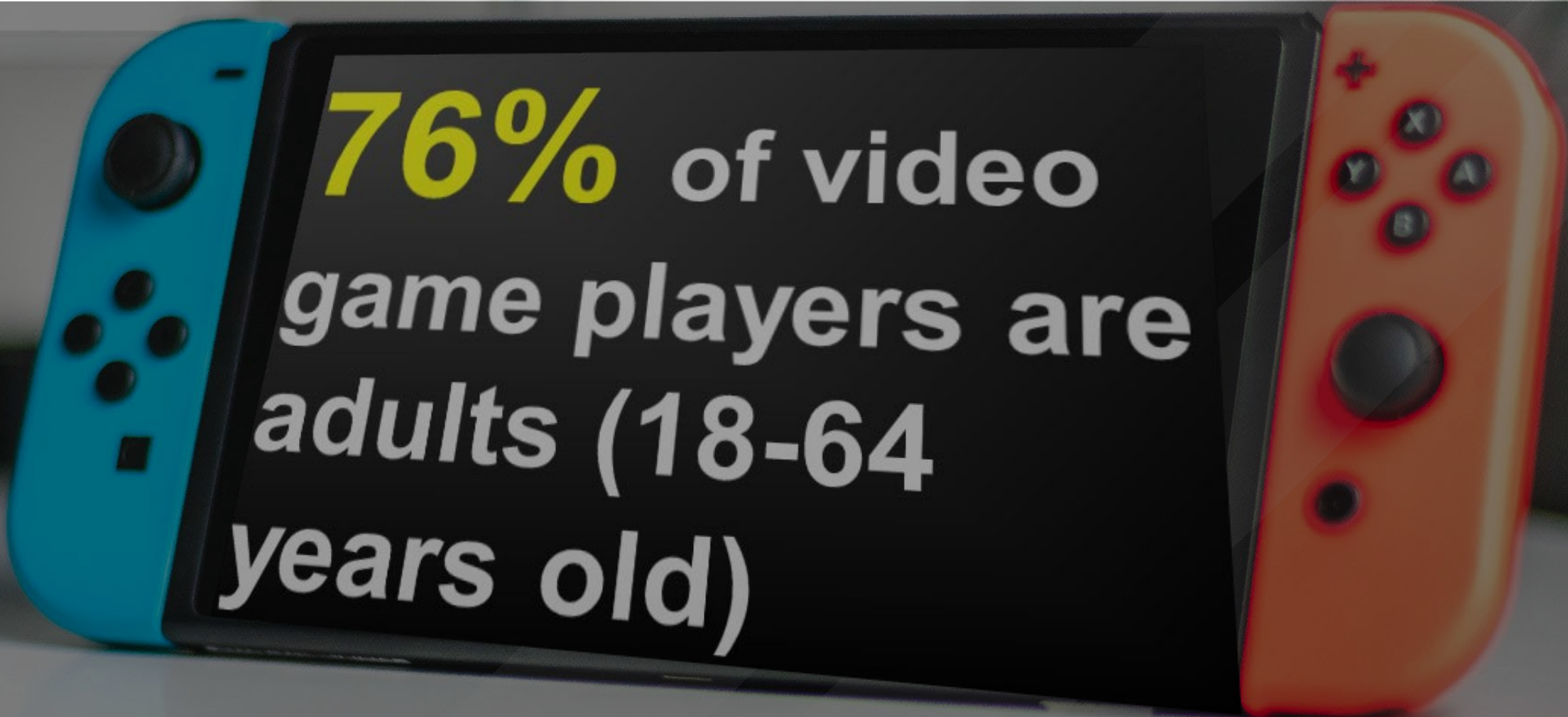
By age



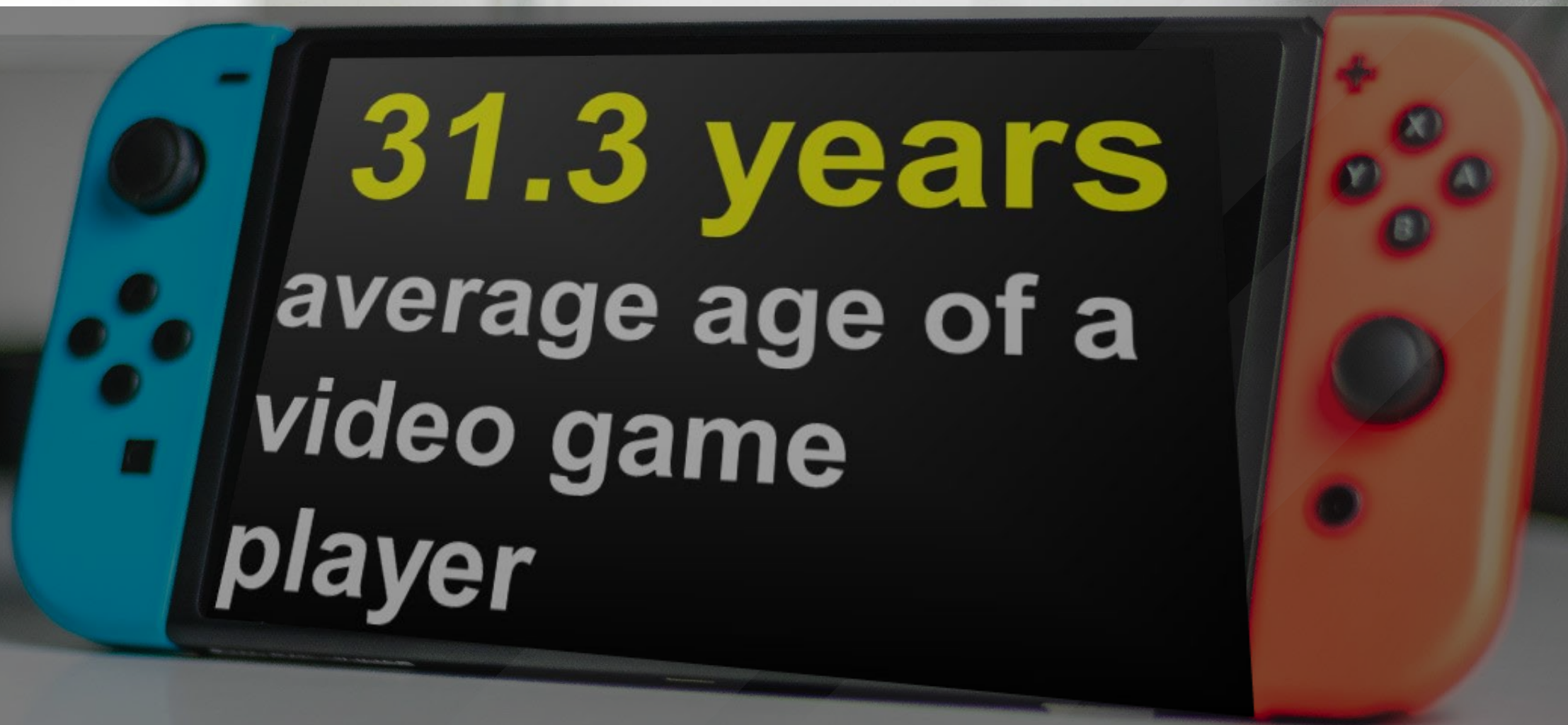
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Base: All 6-64 respondents (n=c.15,000 per quarter)

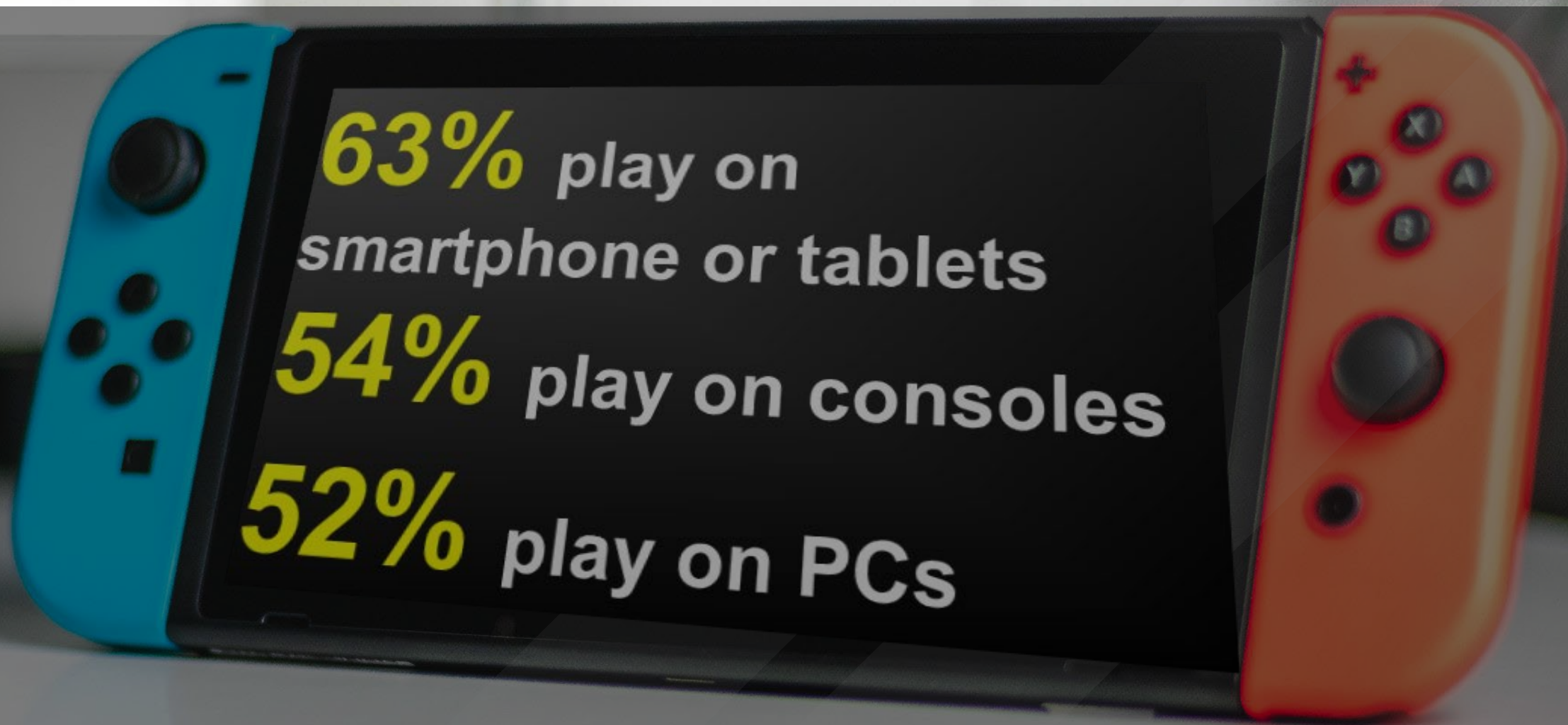




76% of video
game players are
adults (18-64
years old)



31.3 years
average age of a
video game
player



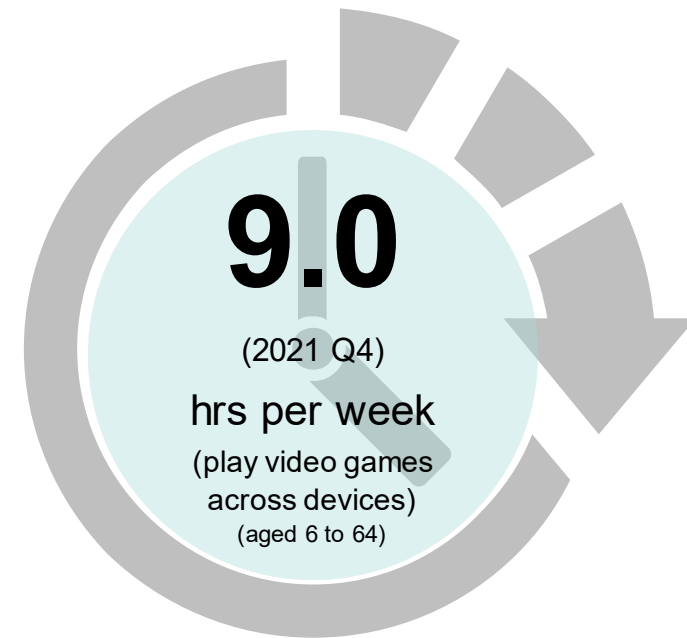
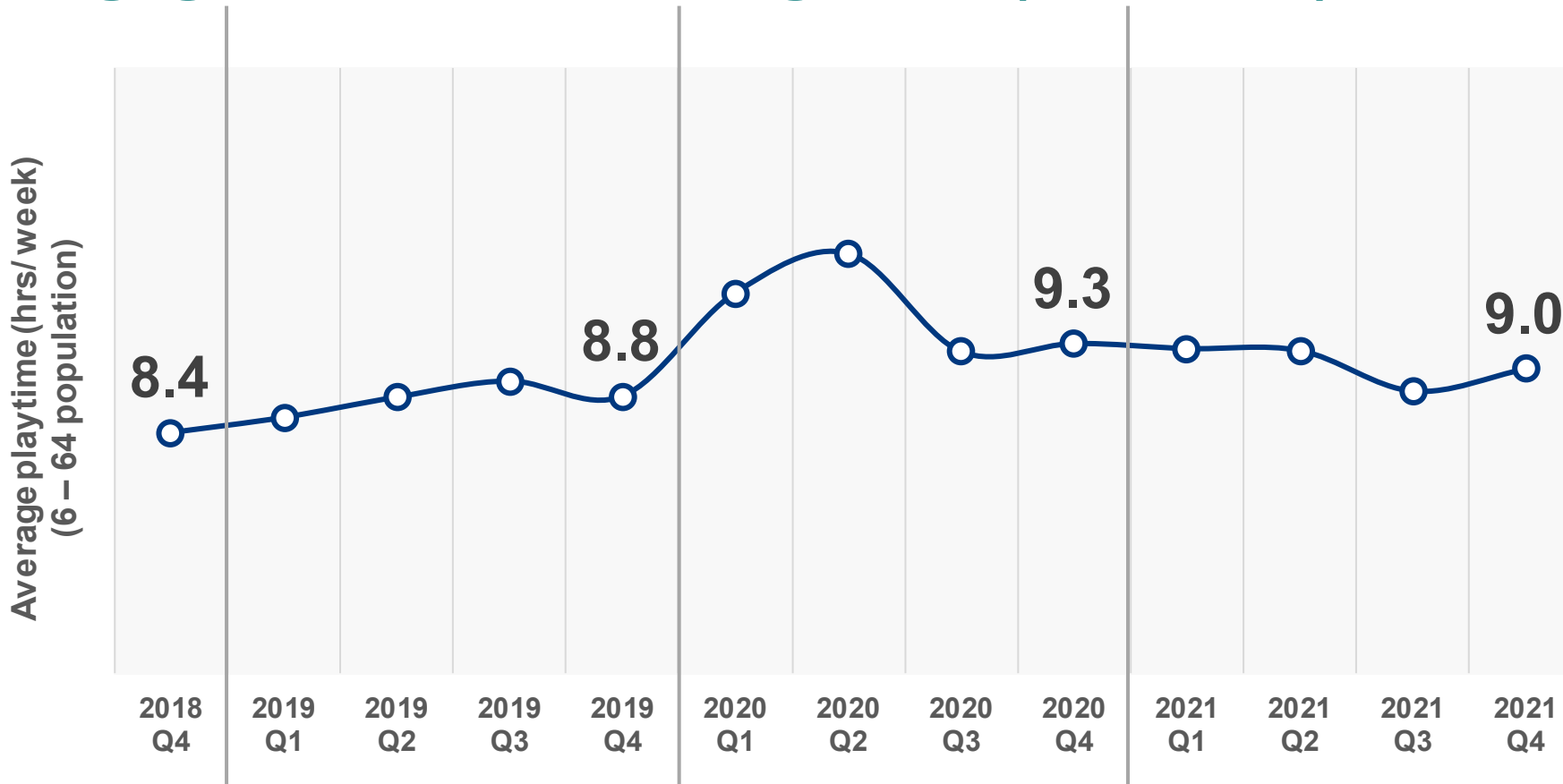
63% play on
smartphone or tablets

54% play on consoles

52% play on PCs

Average playtime is widely stable – apart from pandemic quarters where engagement peaked

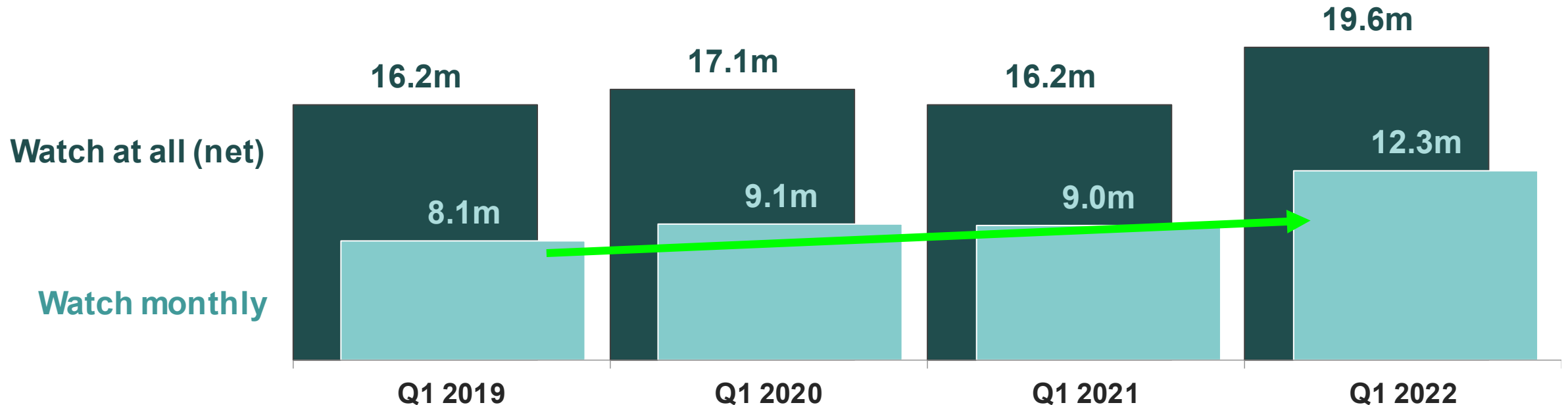
Engagement with video games (hrs/week)



Base: All 6-64 video game players, c12,000 per quarter across Europe 5

Esports also increased its follower base to nearly 20m players who also watch Esports content

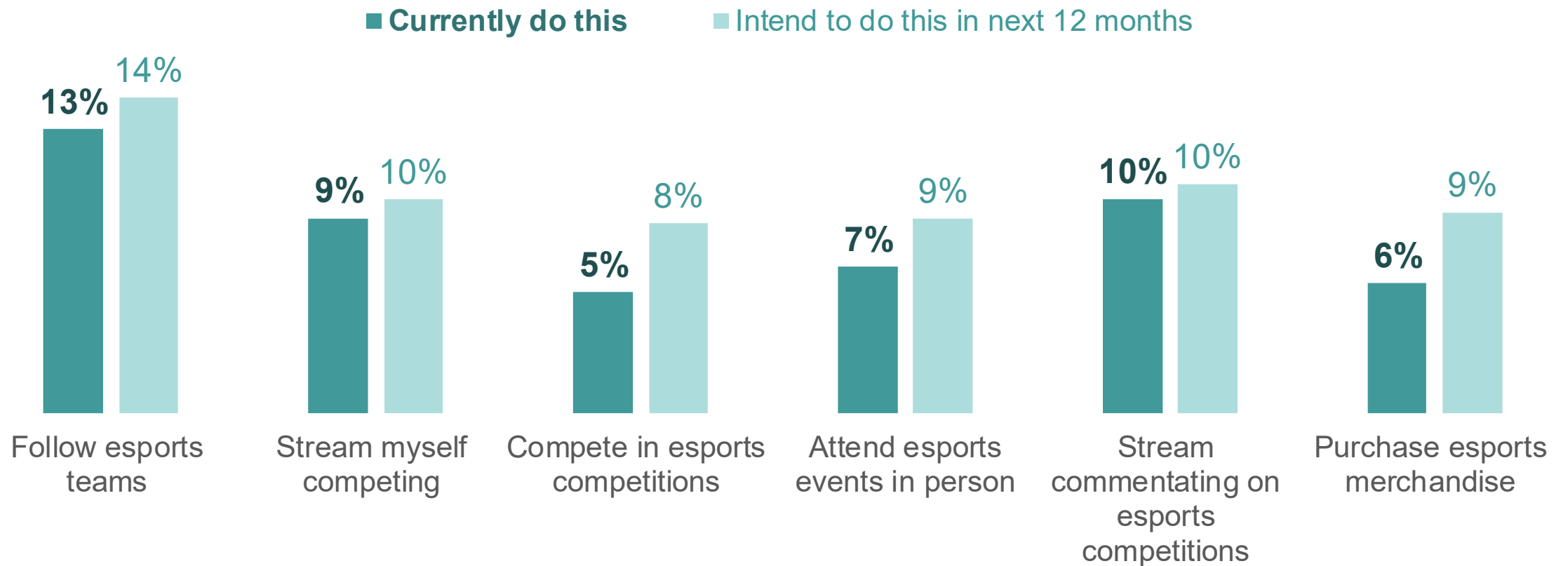
Esports – engagement / viewership



Q. Thinking about esports, which of the following statements apply to you? | Q. Please look at the following list of game titles and tell us which you watch on esports, and also which you play yourself (even if only occasionally). If you both watch a game on esports AND play it yourself, please tick both boxes for that title.

And within Esports followers, there is a variety of activities that could drive Esports further

Esports – Activities and future intend to do these (amongst esports followers)



Q. Thinking again about esports, which of the following applies to you? | Q. Thinking about the next 12 months, which of the following would you be interested in doing?

48% of
video game
players are
women in
Europe 5



Women contribution varies by device with a stronger presence on smart device playing

Women contribution to the Europe 5 video game market

% device players who are women



41%

Play time on device (hrs/week)

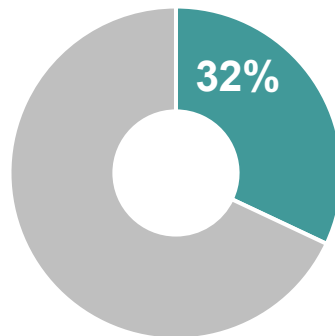
5.4

Estimated 2021 revenue from women

€2.3bn

2021 console revenue

Proportion of 2021 device revenue generated by women

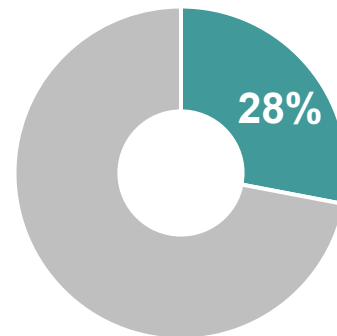


43%

3.9

€0.5bn

2021 PC revenue

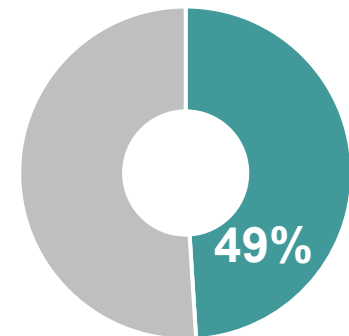


53%

5.1

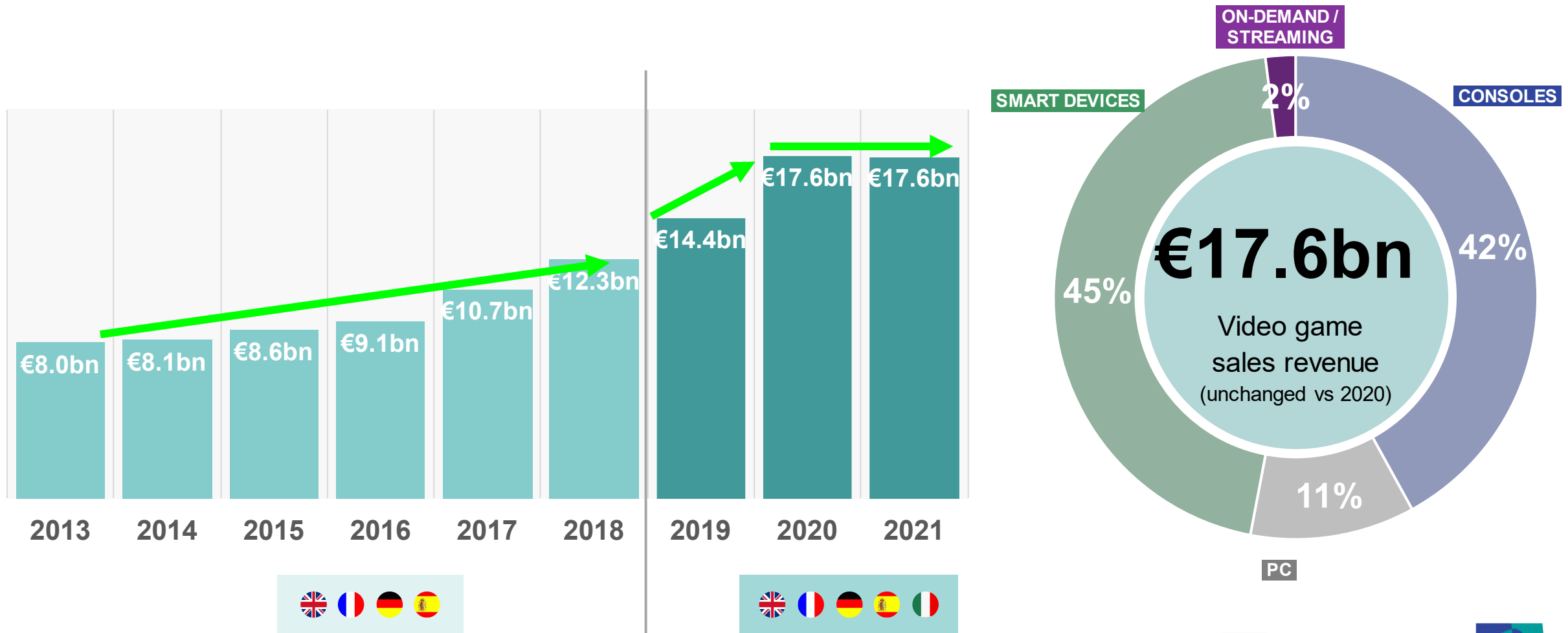
€3.9bn

2021 app revenue



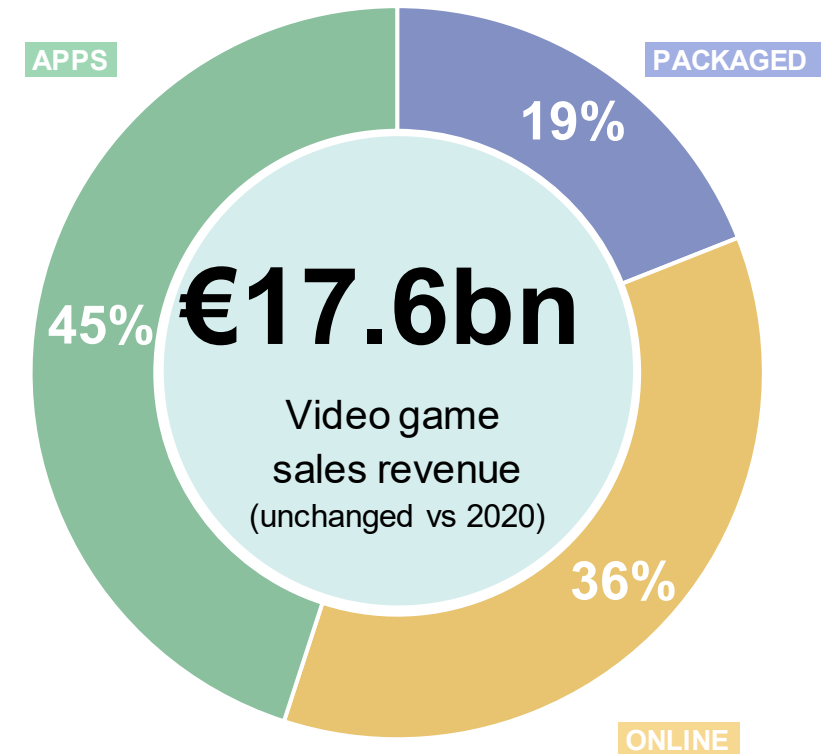
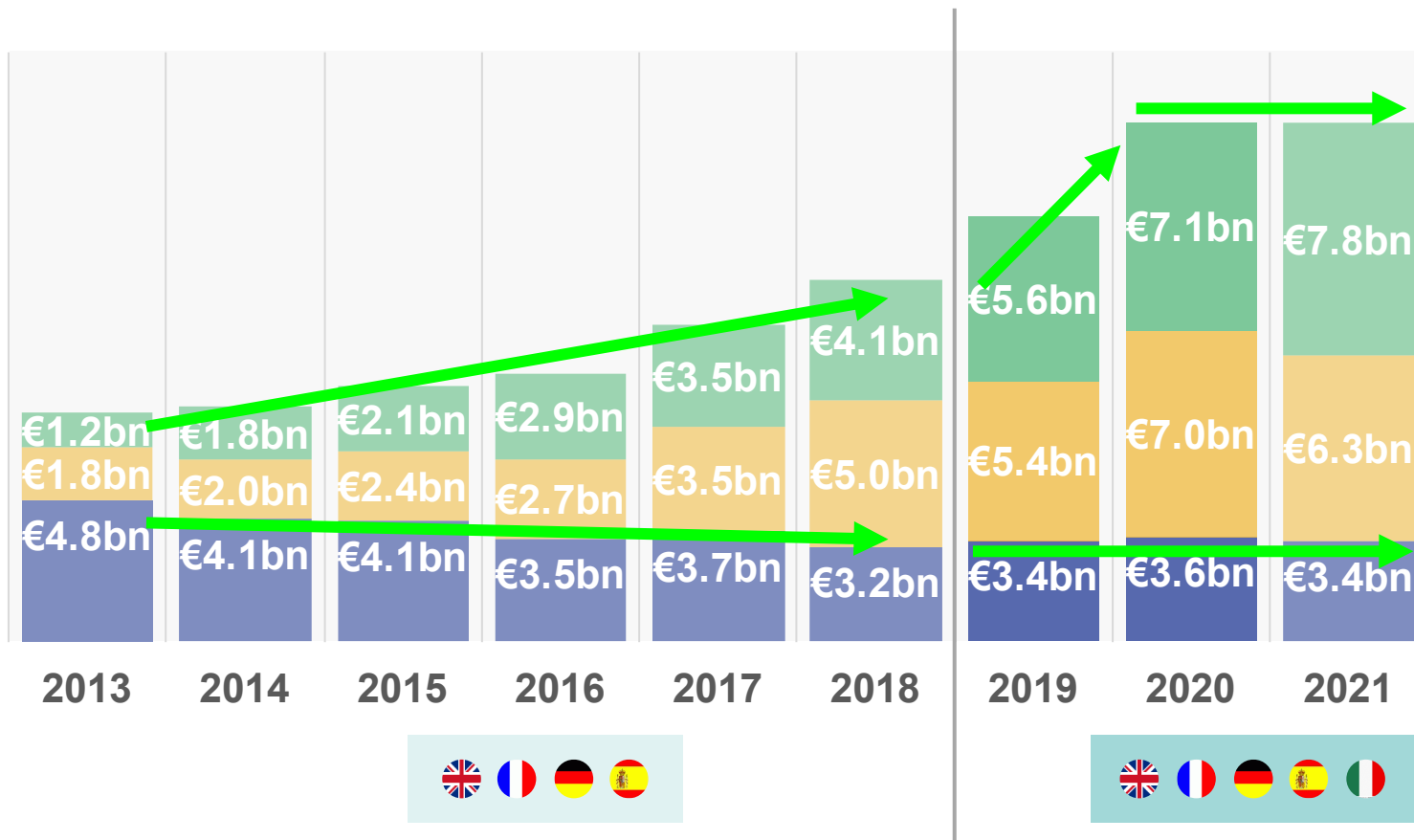
Base: All 11-64 respondents (n=c. 14,000 per quarter)

Total revenue of video game sales increased post pandemic and stabilised during 2021



Digital formats keep the growth trend whilst physical revenue seems to stabilise at c€3.4bn

Total revenue of video games over time - by format



2021 State of Play: Key Take-Outs

1

The number of players continues to grow. Popularity of video games continues to increase with women and 45-65 year-olds driving player growth, making the players profile more inclusive and heterogeneous. App games on smart devices are the most popular format to play video games.

2

Engagement of players stabilises and has come back to pre-pandemic levels. Average play time per week is at 9.0 hrs per week amongst players, however engagement is wider across ages, genders and has increased to further video game activities (e.g. Esports).

3

2021 video game revenue remained stable at €17.6bn, following a strong performance from previous year. There is a stronger digital contribution from apps and online formats accounting for 81% of the total video game revenue during 2021 and this trend will continue overtime.

THANK YOU



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Director
Ipsos MORI

