

12.11.2024, European Audiovisual Observatory, Game on workshop

WHAT DATA CAN BE PROVIDED BY THE INDUSTRY?

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European
Games Developer
Federation

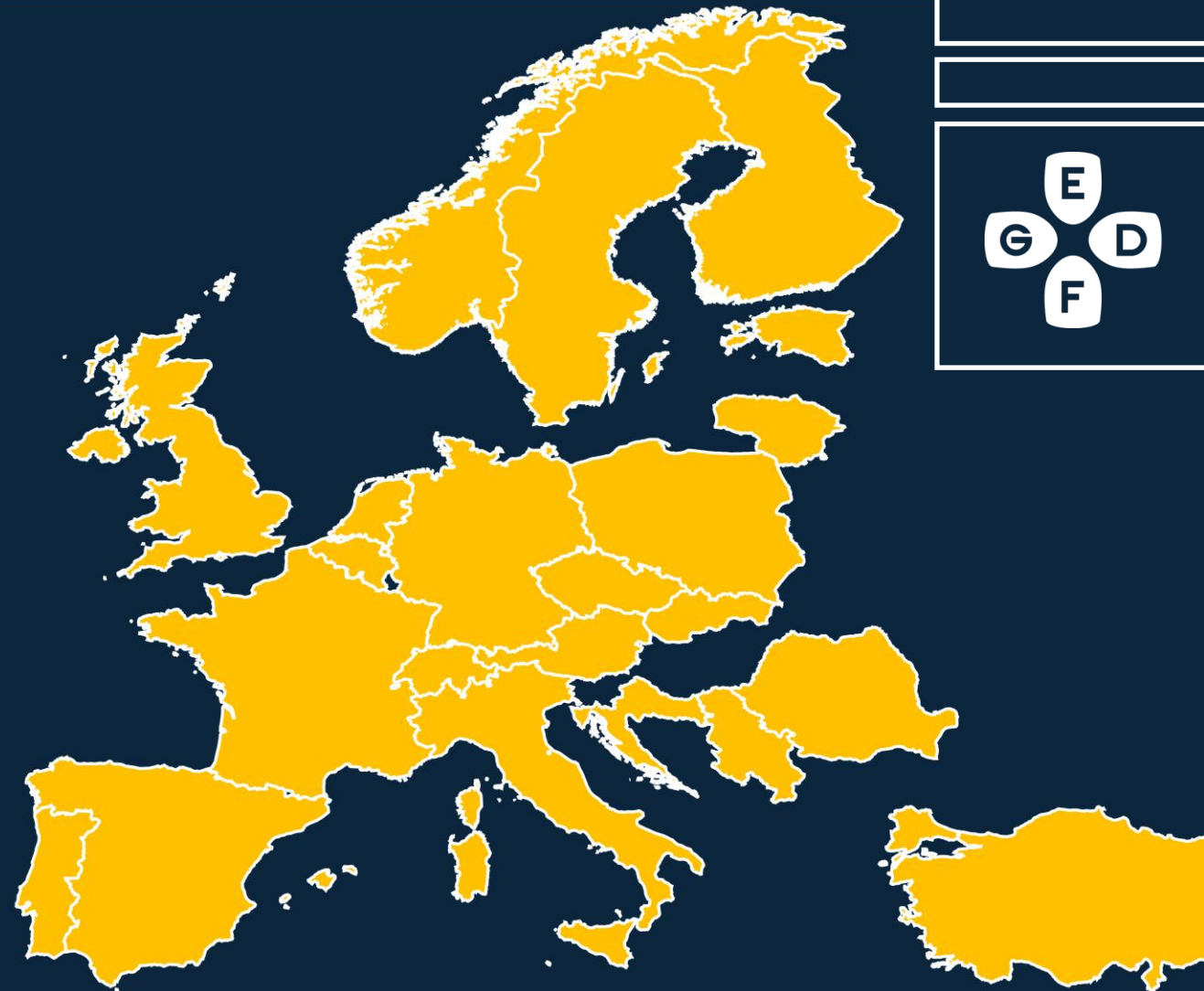
EGDF UNITES

24 trade associations
from 22 countries

2 500+ game dev
studios

40 000+ people working
for those studios

European Games Developer Federation (EGDF) represents European game developers on a European level. It helps 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.



WHAT WE DO?

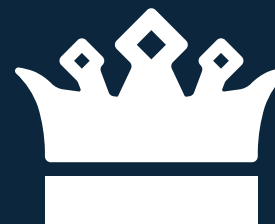
EGDF builds a digital single market area and games industry ecosystem where operationally and artistically autonomous self-publishing European cross-platform game developer studios flourish.



**ACCESS TO
TALENT**



**ACCESS TO
FUNDING**



**ACCESS TO
A ROUTE TO
THE TOP OF
THE VALUECHAIN**



For more
information,
please visit:
www.egdf.eu

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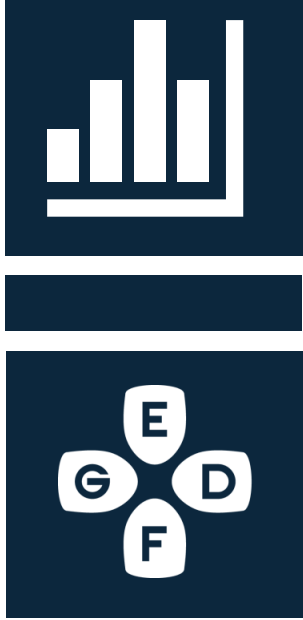
WHAT DATA WE
COLLECT? WHAT
IT MEASURES
AND WHY?



EUROPEAN GAME INDUSTRY



EUROPEAN GAME MARKETS





EUR 18.9B
EUR 25.7B

EUROPEAN GAME INDUSTRY EUROPEAN GAME MARKETS

Sources:

2024 VGE-EGDF

"2023 All About Video Games – European Key Facts"

<https://www.videogameseurope.eu/publication/2023-video-games-european-key-facts/>

2024 EGDF-VGE

"2022 European Video Games Industry Insights Report"

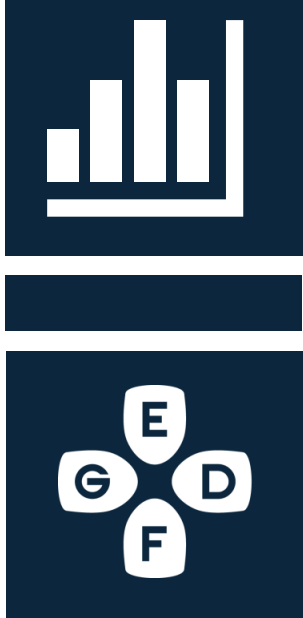
<https://www.egdf.eu/wp-content/uploads/2024/06/2022-European-video-games-industry-insight-report.pdf>

2022 EUROPEAN VIDEO GAMES INDUSTRY INSIGHT REPORT

By European Game Developers Federation (EGDF)
Supported by Video Games Europe



European
Games Developer
Federation

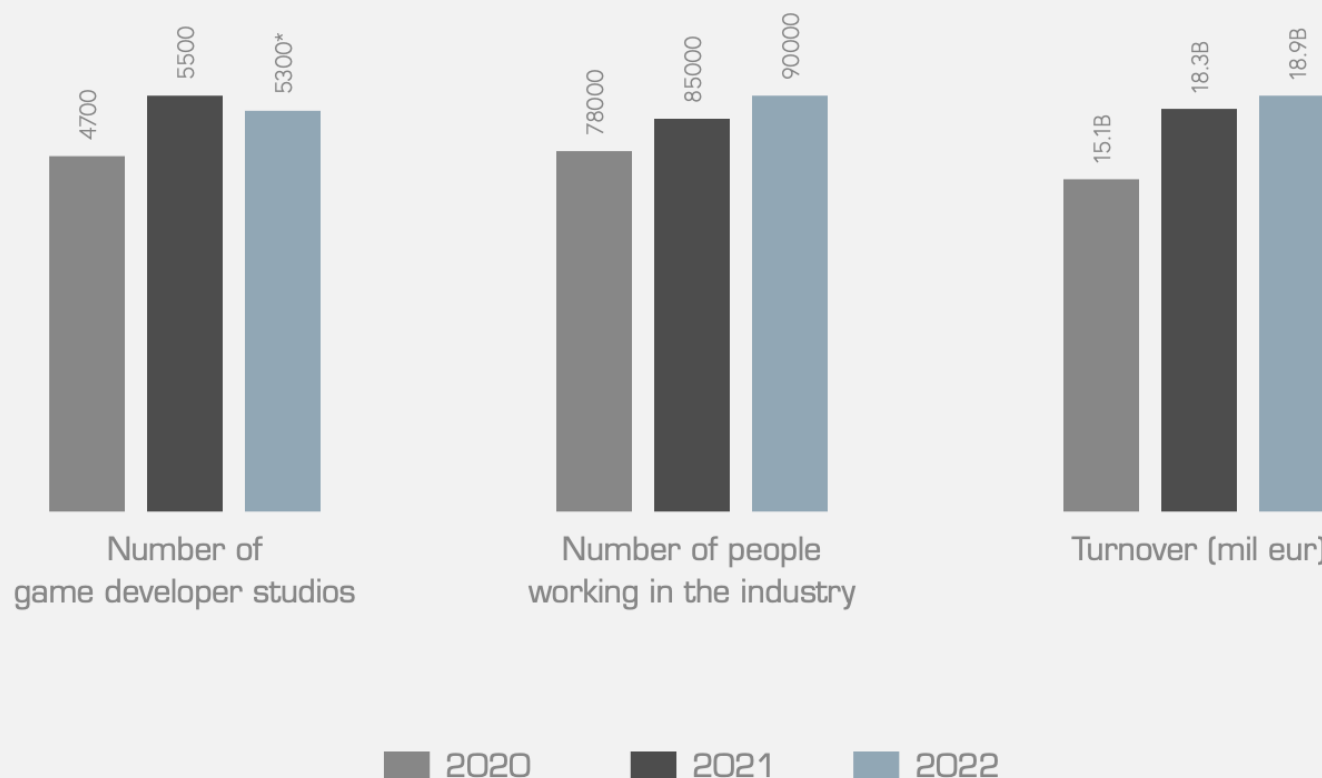


Source:

202406 EGDF-VGE

*"2022 European
Video Games
Industry Insights
Report"*

<https://www.egdf.eu/wp-content/uploads/2024/06/2022-European-video-games-industry-insight-report.pdf>



Note: * the decrease in the number of game developer studios comes from the improving in the France data collection methodology.

Source:
202406 EGDF-VGE
"2022 European Video Games Industry Insights Report"
<https://www.egdf.eu/wp-content/uploads/2024/06/2022-European-video-games-industry-insight-report.pdf>

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Total turnover earned by local game developer studios	11
Number of companies that published new titles	13
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Source:
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HOW DATA IS
COLLECTED?

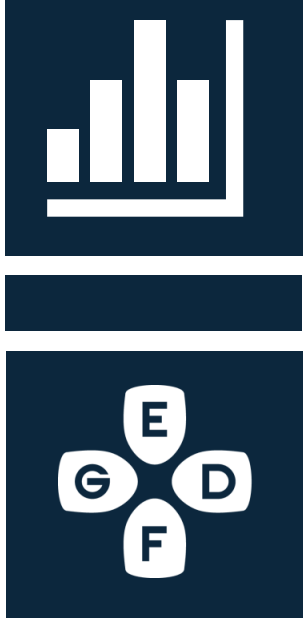
A COMMON
METHODOLOGY?



HOW DATA IS COLLECTED?

PROCESS FOR COLLECTING 2024 INDUSTRY DATA:

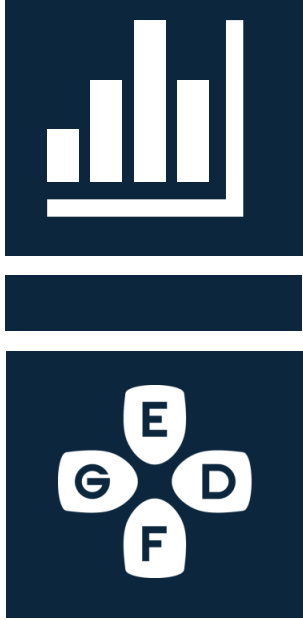
- **Q1 2025 - Q2 2025:** Game developer studios close the financial books from 2024
- **Q3 2025 - Q1 2026:** EGDF/VGE member associations collect data for and publish the reports for 2024 data
- **Q3 2025 – Q2 2026 2026:** EGDF collects the data based on joint methodology from EGDF/VGE member associations and publishes the 2024 Video Game Industry Insights Reports



HOW DATA IS COLLECTED?

HOW THE DATA IS COLLECTED?

- Depending on the country, the following data sources are used:
 - **Trade registers**
 - **Interviews and surveys**
 - **Financial reports** of publicly listed (international) companies
 - **Other studies, surveys and media reports** (e.g. on diversity)





Questionnaire - 2022 data collection

o. Methodology:

Definitions:

- > A game developer studio- is a sole trader or a self-employed person engaged in an economic activity or a company that is registered in the local trade register, whose main source of turnover is coming from developing games (e.g. either developing their own IP or subcontracting game development to other studios). This includes one-man teams. Both studios doing self-publishing and using external publishers are taken into account.
- > A third-party publisher is a company registered in the local trade register that publishes third-party games on behalf of game developer studios that developed them.
- > Do not include data from service providers that is not also a game developer studio or publisher.
- > A service provider is a company that does not make significant artistic contributions to new games. Service provider is for example a business, legal or HR consulting company, QA testing services or analytics services. Service provider is also a company which role is strictly limited to creating assets (for example music or graphics) for other game developer studios or only porting existing games for new platforms.

- > Do not include retail game distribution companies and retailers.
- > An active company is a company that is registered in a trade register, has people working for the company and is generating turnover. In practice, this often has to be evaluated case by case.

o.o. How was the data collected? For example, is data based on information collected from a business register or on interviewing companies? Did you collect the data by yourself or is the data aggregated from third party sources? If yes, what was the source of the data? (Open question)

o.1. How did you identify companies that were included in your data sets? E.g. did you only include your members or do you have a register of active game developer studios and publishers in your country? (Open question)

o.2. All in all, what is the number of developers and publishers you were able to get data from? Do not include service providers into this number. (Number)

o.3 If you have published a report on **2022** data, please send us a link to it:



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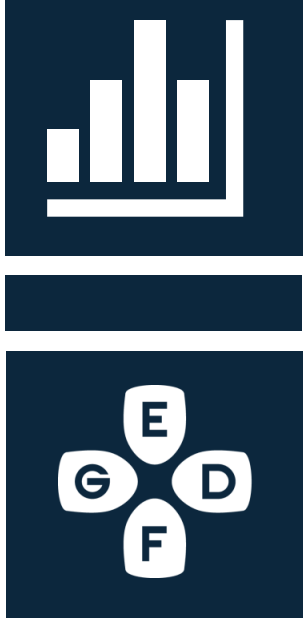


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GAPS and LIMITS

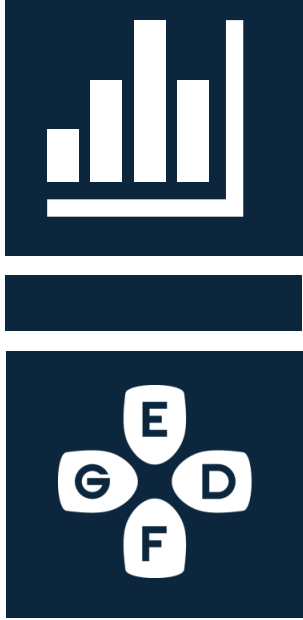
GAPS

- **Geographic gaps**
 - **Completely missing:** Malta, Luxembourg, Cyprus
- **Gaps in time intervals**
 - **Missing annual data:** Austria, Czechia, Denmark, Estonia, Greece, Ireland, Italy, Netherlands and Slovenia
- **Gaps in data points**
 - **Better:** Studios, employees, turnover
 - **Challenging:** diversity, new titles



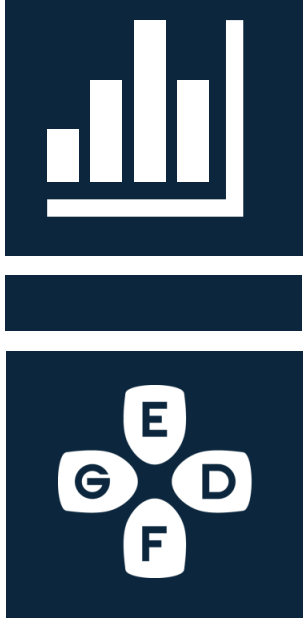
LIMITS

- **Identifying game developer studios**
 - NACE code reform helps, but is not a silver bullet
 - Self-employed vs. employees
 - Active vs. non-active companies
 - Real economic activity vs. registered NACE code
 - Hobbyists vs. traders
 - Easier in small countries than in bigger game dev countries
- **Tracking employees**
 - Subcontractor vs. in-house freelancer vs. employee
 - (Cross border) remote work



LIMITS

- **Identifying new games**
 - Demo vs. soft-launch / early acces vs. global launch
 - Co-productions
- **Resources**
 - Industry surveys vs. trade register data
 - Data processing expertese
- **Regulation**
 - GDPR, special categories of personal data (“sensitive data” on gender, sexuality, ethnicity etc.)
 - Lack of transparent and accessible company data on national business registers



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