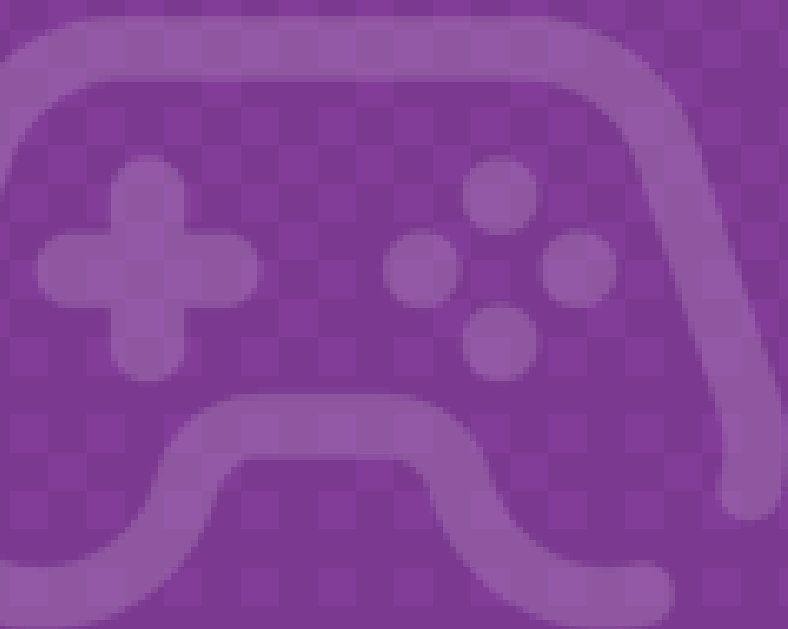




Italian Interactive Digital Entertainment Association

2023

ESSENTIAL FACTS ABOUT VIDEO GAMES IN ITALY





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INTRODUCTION

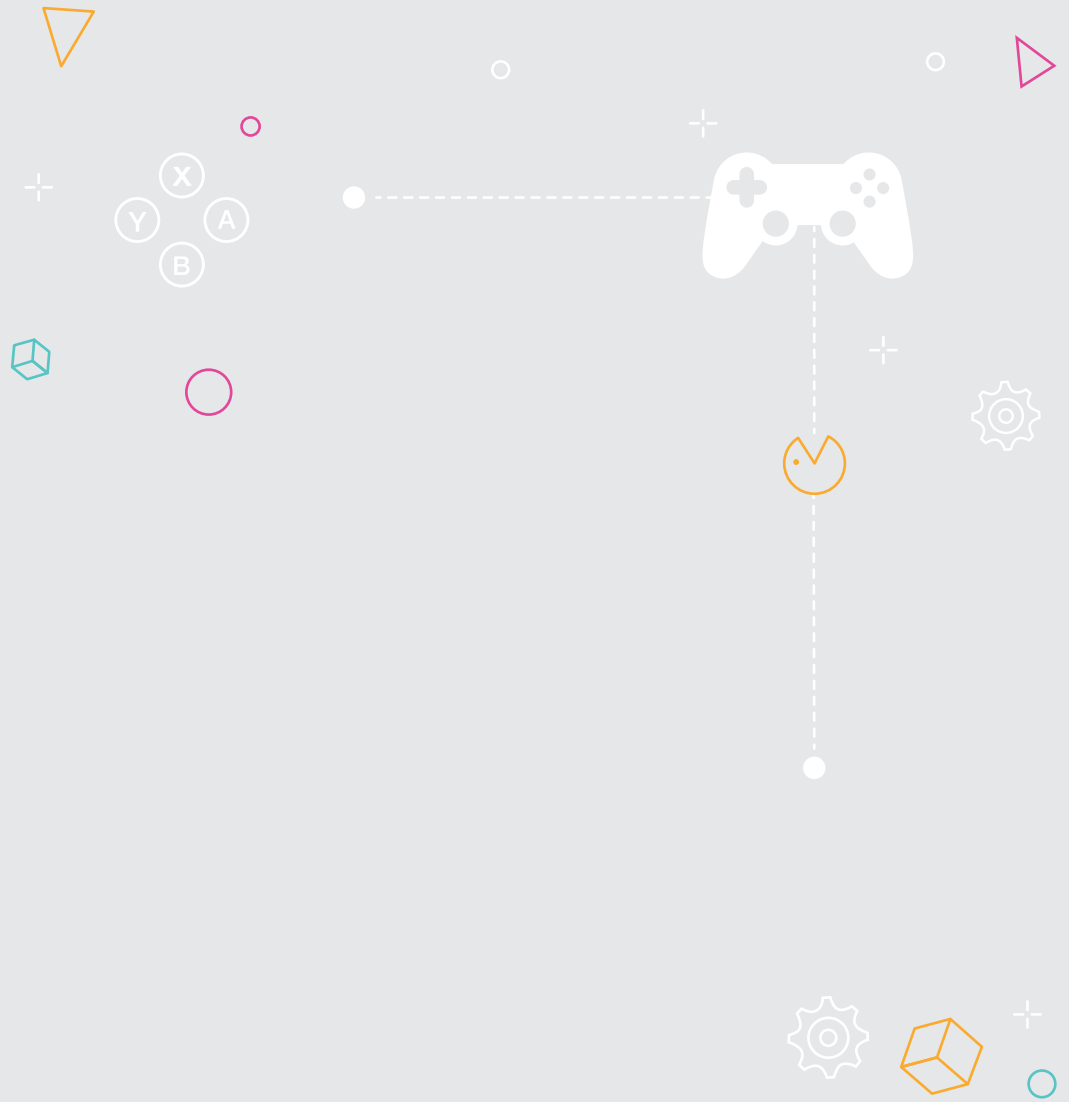
The video games market in Italy is healthy and continues to grow positively. In 2023, the sector's turnover will exceed 2.3 billion euros, with a growth trend of 5% compared to 2022 and 28% compared to 2019, confirming our country among the top five European markets.

This trend is supported by strong and stable consumer demand. Italy has a solid base of enthusiasts, with 13 million registered players between the ages of 6 and 64 in 2023, representing 31% of the Italian population, with an average age of 30. In 2023, there will be an 8% decrease in the target audience, but this decrease will mainly concern occasional videogamers and will generally be linked to the full resumption of activities after Covid and people's need to spend free time outside the home. On the contrary, the core of the most frequent videogamers, made up of 9.5 million people who play at least once a week, has been less affected by this post-pandemic readjustment.

From the point of view of consumption, the hardware segment showed an exceptional performance in 2023, with a growth of 63% compared to 2022 and a value of 665 million euros. Thanks to the availability of new generation consoles, Italian consumers renewed their video game equipment (+69.6% compared to the previous year) and bought new accessories (+45.9% compared to 2022).

Another highlight of 2023 was the increase in purchases of new video games (+6% vs. 2022), with a significant increase in downloads of new console and PC titles (+19% vs. 2022). In contrast, in-game purchases, including DLC downloads, on-demand services and console service subscriptions, will decrease by -42% compared to 2022. Despite this, software remains the most important segment, accounting for 71% of the sector's revenues, equivalent to €1.6 billion.

In conclusion, despite a difficult macroeconomic context, the Italian video games market offers grounds for cautious optimism. In the future, the Italian market is expected to normalise after the exceptional results of recent years due to atypical situations, with a greater concentration of enthusiasts on software purchases and a general stability of consumption. Furthermore, we must not forget the difficult situation of restructuring that has affected the video games sector in the first months of the year, affecting various players, especially at the international level, and in which Italy is less involved.



METHODOLOGY

Methodology



GAMETRACK



Market

The market size is calculated through different data sources.

Packaged products

- Physical Software, Hardware, Accessories: **Games Sales Data (GSD)**

Digital Products

- Console and PC digital software (full games and in-game purchases): **Games Sales Data (GSD)** and **GameTrack**
- Mobile digital software (full games and in-game purchases): **Games Sales Data (GSD)** and **Data.ai**

Consumers

The consumer profile has **GameTrack** as a data source.



Games Sales Data (GSD)

Launched in 2013, the GSD project is the result of a European initiative led by Video Games Europe with the support of hundreds of partners, with the aim of unifying the collection of sales data, both of packaged (retail) and digital products, in the different territories and grouping them together within a single tool made available to professional organisations, distributors and game publishers participating in the panel. The GSD retail panel is distributed across 25 European countries. The GSD digital panel now covers 50 countries spread across Europe, the Middle East, Africa and Asia-Pacific. The panel is managed by Sparkers.

Panel retail: sales data are submitted by retailers in each country on a weekly basis. Data is standardised, aggregated, anonymised and extrapolated to estimate the entire market. To ensure a reliable and uniform database, catalogue information is provided directly by game publishers. At the same time, publishers submit data that allow the calculation model to be refined by extrapolation, offering a more refined view of markets where the retail panel coverage is not 100 per cent.

Panel digitale: sales data cover sales of complete video games made on the PlayStation Network (PSN), Xbox Live (XBL), Nintendo eShop (third-party publishers) and major PC distribution platforms (Steam, Epic, proprietary stores). The sales data are reported weekly directly by the participating game publishers and therefore do not require any extrapolation. GSD is the only source of data based on downloads of video games on actual sales.

GameTrack

GameTrack is a flagship tracking study that delivers comprehensive insights on the video gaming landscape, providing up-to-date data on market size and gamers' behaviours from a macro point of view, alongside specifics on who, what and how gamers' engage with video games on a personal level. Commissioned by Video Games Europe and run by Ipsos' team of video game experts, this multi-country survey is designed to provide key figures on the gaming habits across the UK, France, Spain, Germany, and Italy.

GameTrack encompasses all possible devices used for playing video games – from PCs, laptops, consoles, portable gaming devices, smartphones, tablets, to smart TVs and other emerging technologies. It delves into all available video game formats, from packaged games to apps, online games, multiplayer games, browser games, games on social network sites, and the rise of the newest on-demand/streaming game services, providing a strong view of the video game ecosystem.

Central to GameTrack are the below key metrics, with each breaking down the total market by specific devices and types of video games:

Demographics: Who and how many plays video games, how do people play games, along with attitudes towards playing video games.

Engagement: How much time is spent playing video games.

Value estimates - Amount of money being spent on video games - revenue generated by video game sales.

Volume estimates - Number of video games / micro-transactions / subscriptions being acquired (both paid and free).

GameTrack data is available for all video game publishers and creators that subscribe to VGE, providing the essential information they need to understand and analyse the market. On top of quarterly reports and webinars, subscribers also get access to the data through an interactive online platform that is updated on a quarterly basis. GameTrack offers insights into the full video game ecosystem in terms of engagement, and this relates to the revenue generated from video game sales, providing a clear picture of how the industry evolves.

Each quarter, an online survey goes out to a nationally representative sample of 3000 users aged 6-64 years for each of the markets (15,000 across the countries per quarter). Also, each year, we interview a sample of 1000 adults aged 18+ in each country via a short offline survey (including questions relating to games played by their 6–17-year-old children), to weight responses from the quarterly online surveys and bring the results into context for each country.

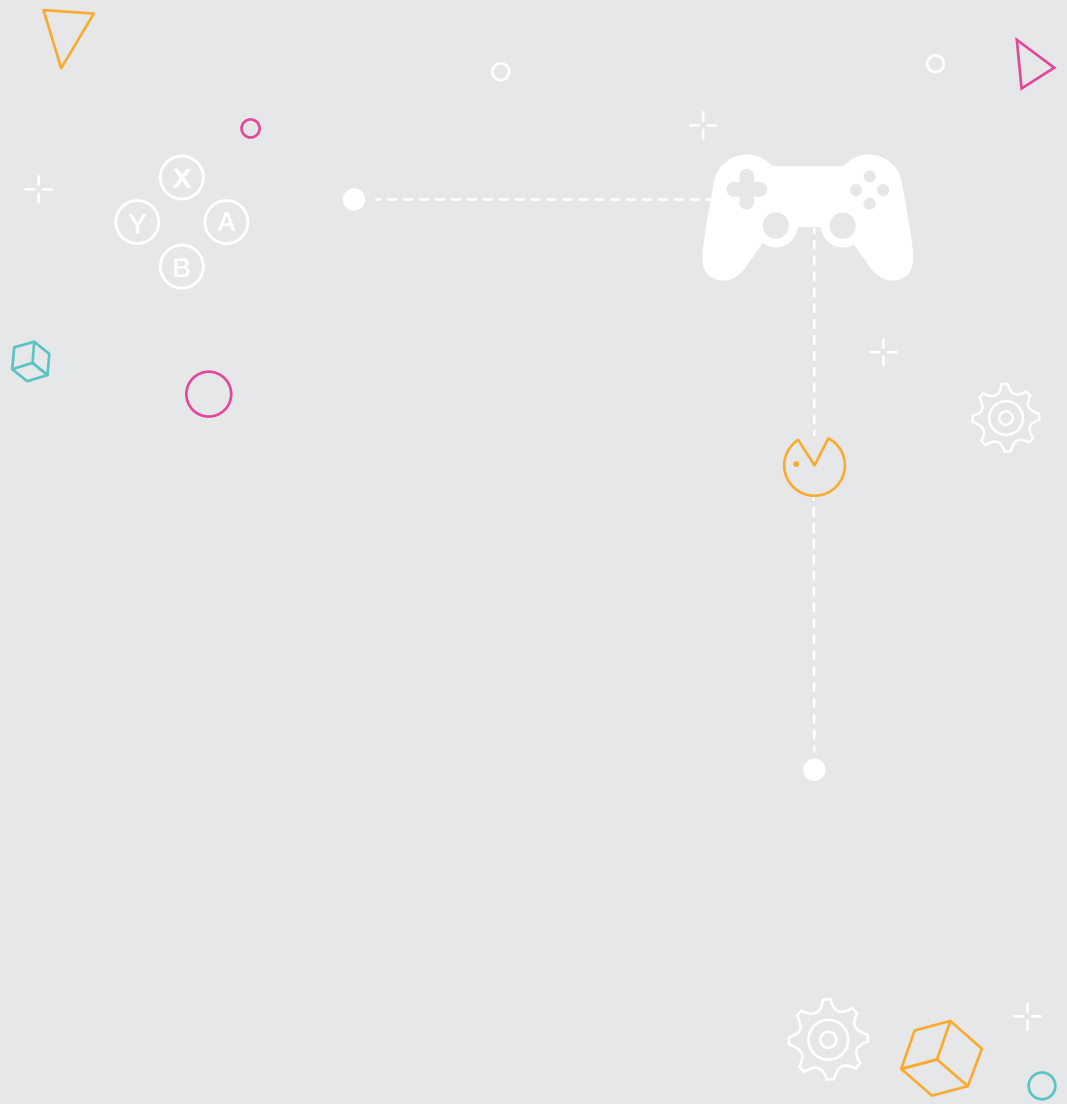


Data.ai

Data.ai is the international benchmark for mobile app market data. Its methodology is based on:

- Periodic comprehensive rankings received from Android and iOS;
- For the same periodicity, exact units and values of multiple mobile games provided by the app developers.

The data collected by Data.ai through this methodology allows it to estimate the value generated by units sold and developers. GameTrack's extrapolation rates are applied to estimate consumer spending.




ITALIAN VIDEO GAMES MARKET

TURNOVER

HARDWARE

665 MLN €


29% of the total

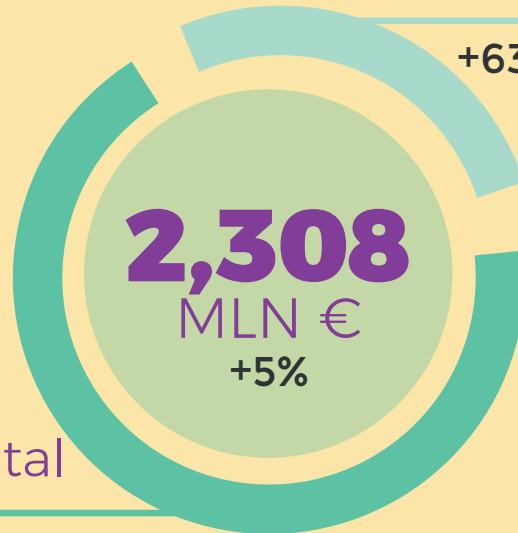
+63% compared to 2022 

SOFTWARE

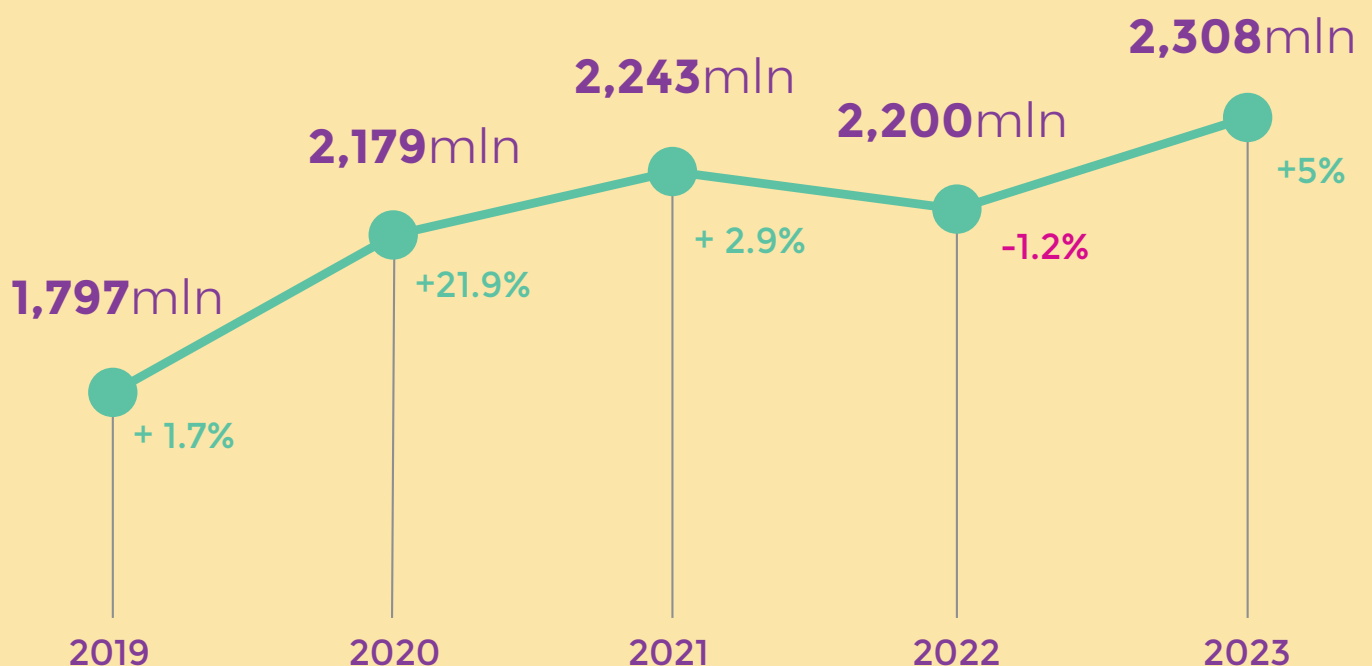
1,642 MLN €

71% of the total

-8% compared to 2022 



Last 5 years



MARKET SEGMENTS

Hardware

665 MLN €

+63% compared to 2022

73% of the total

487 MLN

+70% compared to 2022

CONSOLE

27% of the total

178 MLN

+46% compared to 2022

ACCESSORIES



Software

1,642 MLN €

-8% compared to 2022

36% of the total

599 MLN

-21% compared to 2022

DIGITAL
(CONSOLES AND PCS)

47% of the total

780 MLN

+4% compared to 2022

APPS

16% of the total

264 MLN

-6% compared to 2022

PHYSICAL



NEW VIDEO GAMES AND IN-GAME PURCHASES

Purchases of new video games

577 MLN €

+6% compared to 2022



Digital

(Consoles and PCs digital downloads)

54% of the total

314 MLN

+ 19% compared to 2022



Physical

(Packaged video games)

46% of the total

264 MLN

-6% compared to 2022

In-game purchases*

285 MLN €

-42% compared to 2022

*DLC for consoles and PCs, on-demand services, subscriptions to console services



BEST-SELLING VIDEO GAMES IN 2023

1 2 3



**EA SPORTS
FC 24**



**HOGWARTS
LEGACY**



**CALL OF DUTY:
MODERN WARFARE III**

4 SPIDER-MAN 2 (2023)

5 SUPER MARIO BROS. WONDER

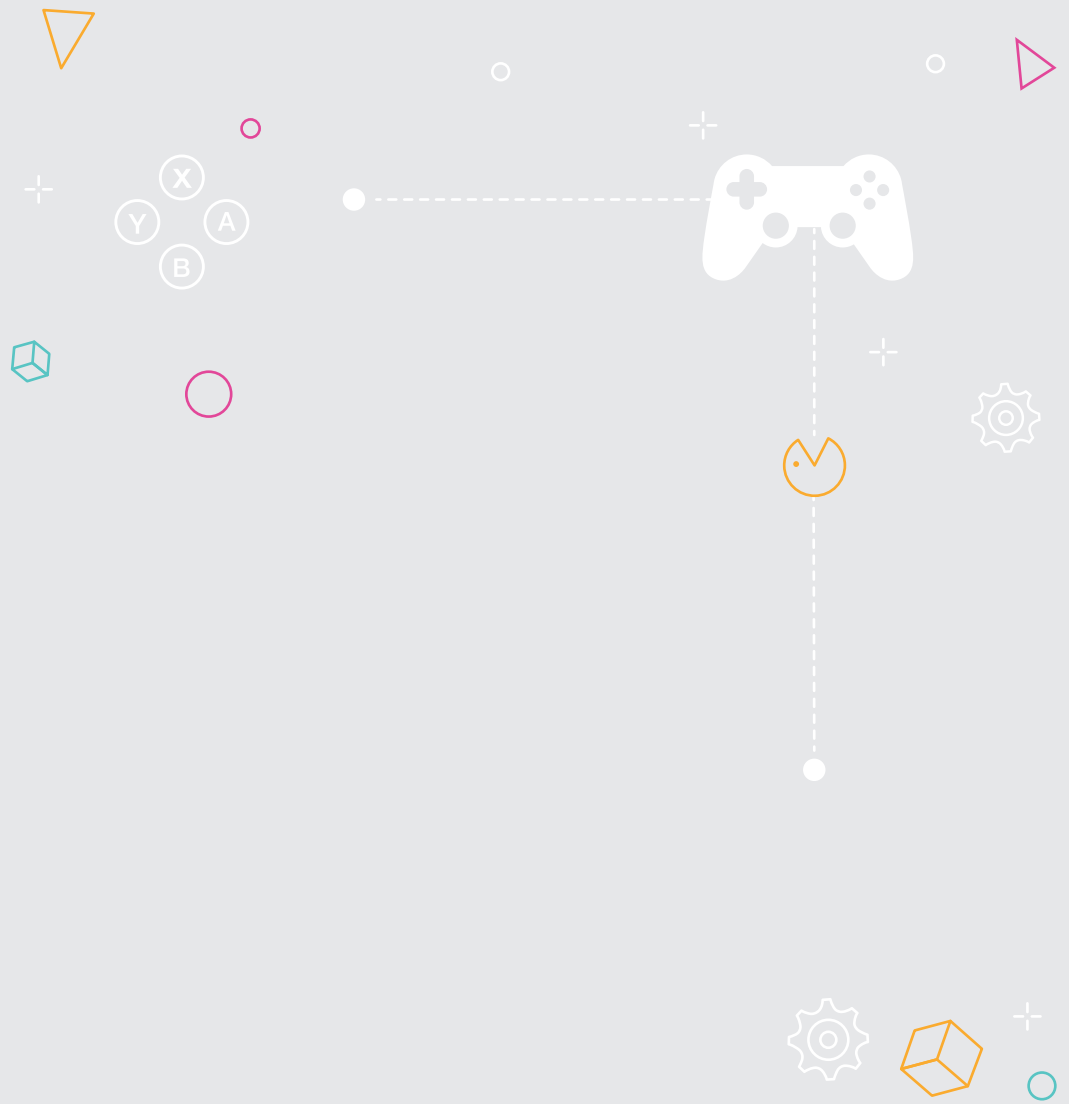
6 THE LEGEND OF ZELDA: TEARS OF THE KINGDOM

7 DIABLO IV

8 F1 23

9 ASSASSIN'S CREED MIRAGE

10 RESIDENT EVIL 4 (2023)



ITALIAN PLAYERS

ITALIAN PLAYERS

13 MLN

in 2023

-8% compared to 2022

31%

of the Italian population
between 6 and 64 years of age
Average age: 30



61%

MEN

8.0MLN

-5% compared to 2022

Average age: 30



38%

WOMEN

4.9MLN

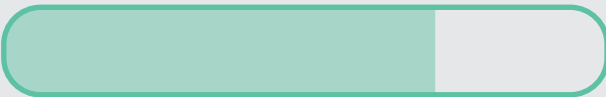
-15% compared to 2022

Average age: 31

OTHER*
0.1MLN

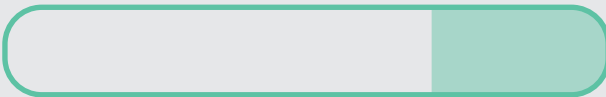
*people who do not identify themselves either as women or as men (data collected for the first time, we do not have year-on-year comparison)

69.6%
of players



are over 18 years old

30.4%
of players



are between 6 and 17 years old

ITALIAN PLAYERS

2023 vs 2022

9.5MLN

play at least
once
a week

-4% compared to 2022

2.2MLN

play at least
once
a month

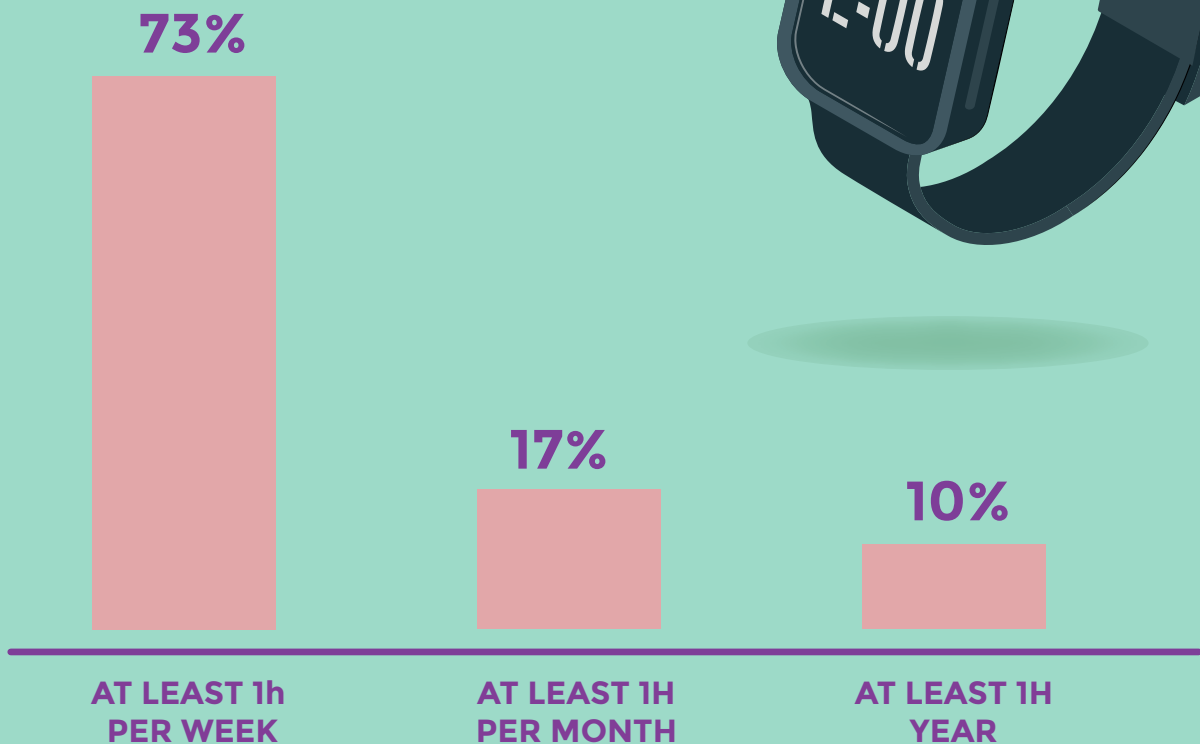
-22% compared to 2022

1.3MLN

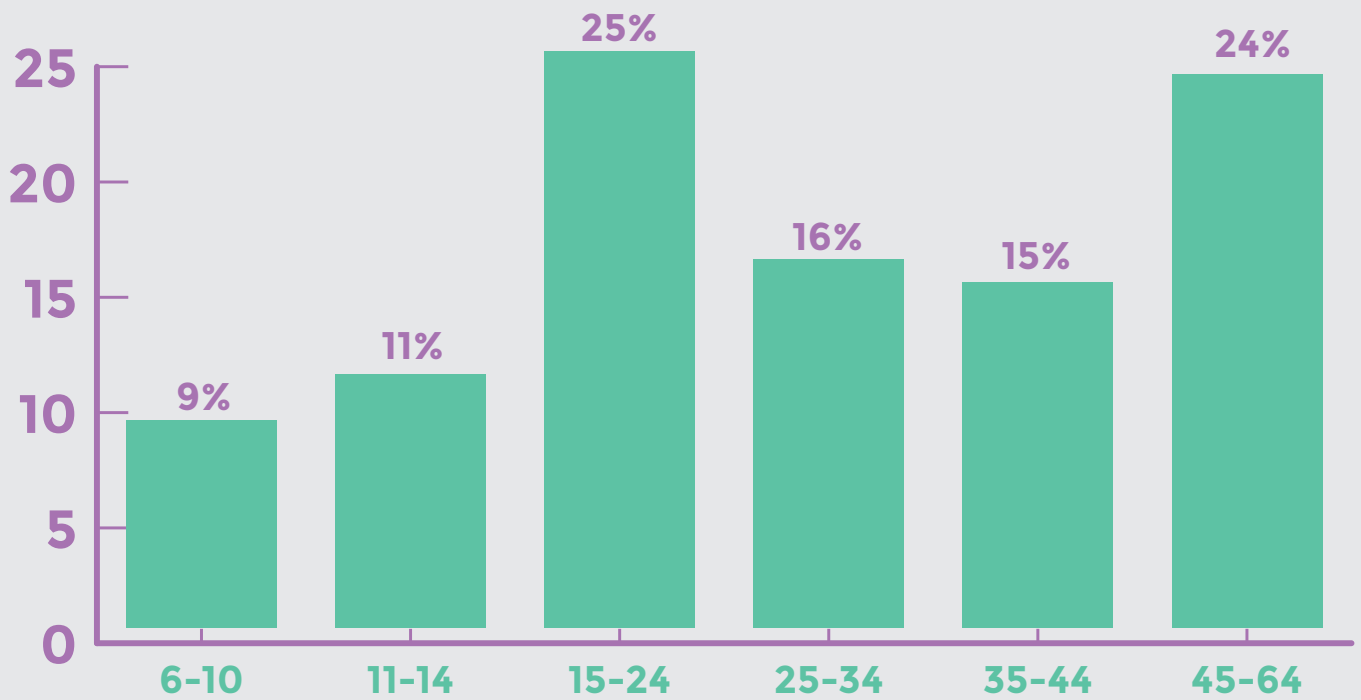
play
less frequently

-30% compared to 2022

PLAYTIME



PLAYERS BY AGE GROUP



6-10 YEARS OLD

1.2MLN

47%

-26% vs 2022



11-14 YEARS OLD

1.5MLN

65%

-8% vs 2022



15-24 YEARS OLD

3.2MLN

55%

-7% vs 2022



25-34 YEARS OLD

2.1MLN

33%

-8% vs 2022



35-44 YEARS OLD

1.9MLN

26%

+6% vs 2022



45-64 YEARS OLD

3.1MLN

17%

-9% vs 2022

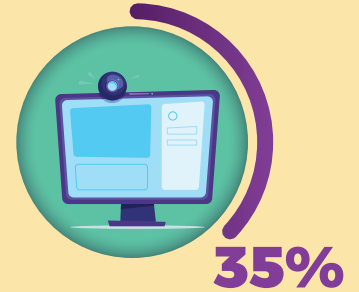
DEVICES USED TO PLAY VIDEO GAMES



9.2 MLN
PLAY ON
MOBILE DEVICES
-7% vs 2022

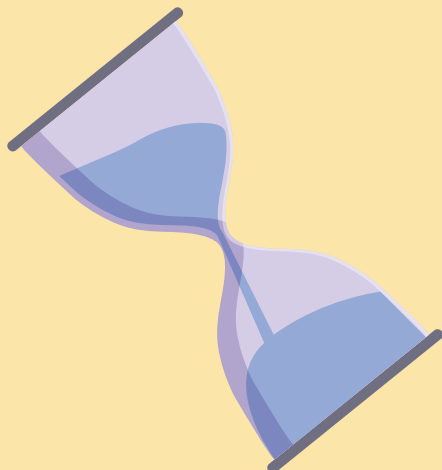


5.6 MLN
PLAY ON
CONSOLE
-15% vs 2022



4.6 MLN
PLAY ON
PCS
-15% vs 2022

AVERAGE PLAYTIME



*Hours/week

VIDEO GAMES GENRES



ACTION

the player controls a character who moves through a virtual environment where he has to fight against opponents and overcome various obstacles.



ROLE-PLAYING

the player manages the evolution and growth of a fictional character within a virtual world, where he can make decisions that influence the plot and interact with other characters.



RACING

the player drives a vehicle in races against other competitors, trying to get to the finish line first.



STRATEGY

the player must plan and manage a series of actions to achieve a specific goal. Using one's intelligence and tactical problem-solving skills is required.



SPORT

the player controls a character or team that participates in sports competitions simulating the rules and dynamics of real sports.



CASUAL

designed to be simple and straightforward, with an intuitive interface and an easy learning curve. Designed to be played in short, casual sessions.



FIGHTING

the player controls a character who fights against an opponent, with the objective of defeating him or her in a direct confrontation.



ADVENTURE

the player controls a main character who explores a virtual world and must solve puzzles and interact with non-player characters to progress in the game's storyline.



SHOOTER

the player controls a character who uses firearms to eliminate enemies, with fast-paced, frenetic gameplay that emphasizes aiming and reactivity.



ARCADE

video games with gameplay frenetic and immediate gameplay, characterized by a high level of challenge and with a strong emphasis on competitiveness between players.



TRIVIA

for those who want to put test their knowledge in different fields.



BRAIN/PUZZLE

for lovers of puzzles and challenges of logic and ingenuity.



FAMILY

video games designed for the whole family, to be played together.

FAVORITE VIDEO GAME GENRES

PC



19%



Strategy

16%



Shooter

14%

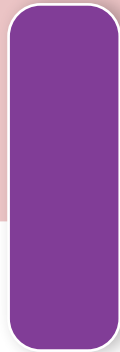


Sport

CONSOLE



29%



Sport

26%



Racing

22%



Shooter

MOBILE



20%



Brain/Puzzle

18%

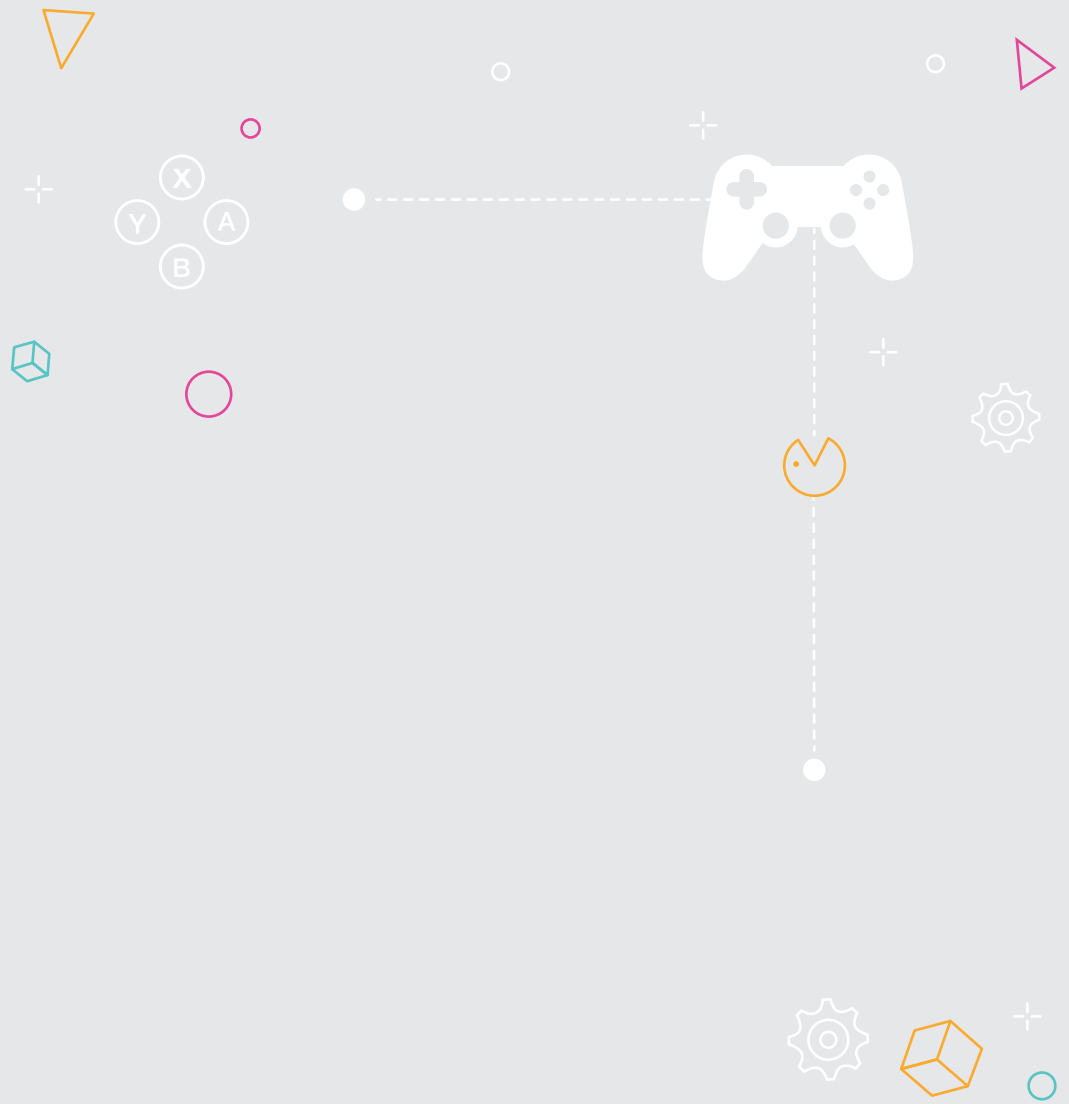


Trivia

16%



Role Playing/
Strategy



RESPONSIBLE GAMEPLAY



PEGI is the pan-European video game age rating system. PEGI’s goal is to educate, advise and empower players, parents and guardians on content in video games.

PEGI also ensures that games are sold and advertised responsibly, that consumer redress is available, and that companies pay attention to online game playing environments. PEGI age ratings are established under the supervision of independent experts and classification bodies.

PEGI is recognized by the European institutions and EU Member States as a model of European harmonisation in the field of minor protection and consumer transparency.

Visit www.pegi.info for more information and download the PEGI app for iOS/Android.



38+
European
Countries



2.600
member
companies



35.000+
games
rated

Classification by age



Suitable for all age groups,
no unsuitable 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

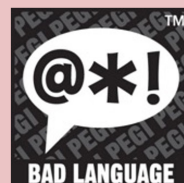


May depict realistic violence against humanlike characters, bad language, use of drugs, or erotic nudity

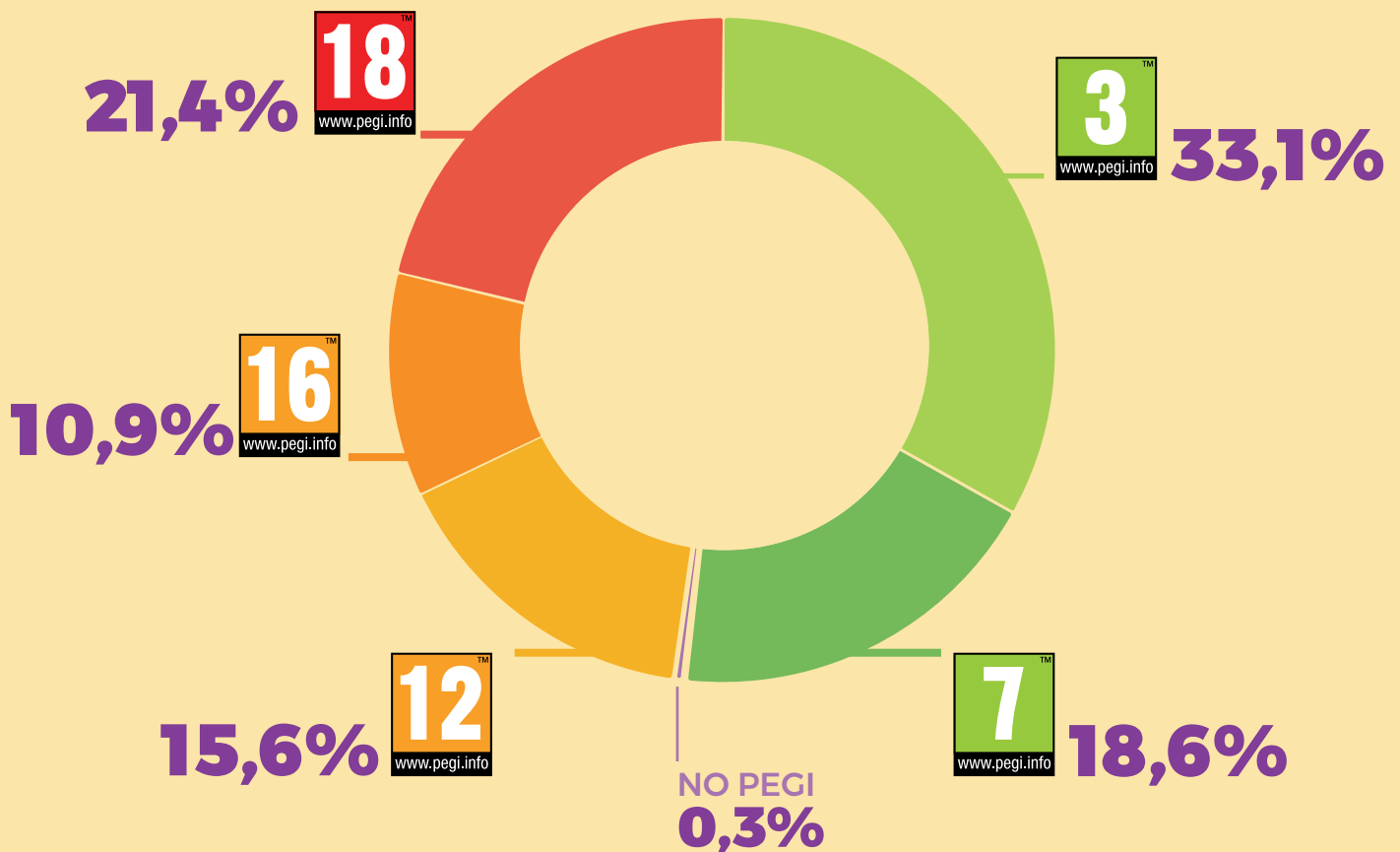


Games that contain gross violence against defenceless characters, glamorisation of drugs, or explicit sexual activity

Classification by content



Video Game Sales by PEGI Classification in 2023



67.3% of video games sold in Italy in 2023 is suitable for an audience between 3 and 12 years old (PEGI 3, PEGI 7, PEGI 12).



Parental control tools

Parental control tools or family settings help parents and guardians decide with their children what works best for them, from time spent playing video games to communication with other players and much more.

On every device, it is possible to discuss:



Age rating

Which games they can play based on PEGI age rating and descriptors



Time limit

Agree on playtime limits, allowing for better playtime management



Online spending

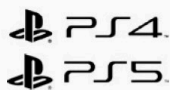
Discuss with their children how much can be spent when purchasing games and other downloadable content



Online Interaction

Agree on communications in games: friends only, friends of friends, anyone, or no one

LIST OF DEVICES OFFERING PARENTAL CONTROL TOOLS



Playstation



Xbox



Nintendo 3DS



PlayStation-Vita

PS Vita



Nintendo Switch
Lite

Nintendo



Windows

macOS

Mac Os



iPhone/iPad



Android/Google Play



Windows 10



Google Stadia



Meta Quest



Tutto sui videogiochi is a portal dedicated to parents, educators and all those who want to learn more about the world of video games.

The website provides free information and resources to understand video games and use them to their fullest potential: guides, tutorials and recommendations for choosing the most suitable titles, based on the age of the players, for setting parental controls on the main platforms used to play video games and monitoring their use.

In addition to this, it is possible to find “parent-friendly” guide of the main video games on the market suitable for an audience of minors.

The portal relies on a team of independent experts in different disciplines such as psychology, sociology or pedagogy, who collaborate with the site by making experiences and knowledge available in different fields.

The experts provide in-depth information on topics of common interest, such as the use of video games in the family and at school, health protection, and possible job opportunities in the sector.

Tuttosuivideogiochi.it is a project created and financed by IIDEA in collaboration with PEGI S.A., an independent non-profit organization which manages the pan-European video game classification system PEGI (Pan European Game Information). The portal was created in the wake of the recommendations contained in the Guidelines attached to the Regulation for the classification of the contents of audiovisual works for the web and video games, produced by the Communications Authority (AGCOM), with resolution 74/CONS/19. U.

Tuttosuivideogiochi.it joins Repubblica Digitale, the initiative promoted by the Department for digital transformation of the Presidency of the Council of Ministers with the aim of combating the cultural digital divide present in the Italian population. The initiative is aimed at supporting maximum digital inclusion and promoting education on future technologies, accompanying the country’s digital transformation process.



Italian Interactive Digital Entertainment Association

IIDEA is the Association representing the video game industry in Italy. It was founded in the early 2000s with the aim of representing and uniting the sector through a unified approach. It currently has over 80 members, including console manufacturers, video game publishers and developers and operators in the esports sector, such as organizers of video game competitions and teams. IIDEA is part of a network of industry associations at an international level and at a European level it is a member of Video Games Europe and of European Game Developers Federation.

IIDEA's mission is to create an environment conducive to the development of the sector in Italy and to enhance the role of video games in the country's economy, society and culture. To achieve these objectives, the association carries out activities such as the publication of market reports, surveys of operators in the sector, collaboration with public institutions and the promotion of gaming culture through events and initiatives in the field. It also works to support the business of companies, with a particular focus on internationalisation, and to promote the responsible use of video games by providing consumers with useful information on the European system for classifying video games (PEGI) and parental control systems.

IIDEA is the promoter of First Playable, the reference business event for the video games sector, which also hosts the Italian Video Game Awards ceremony. It also promotes the Italian Esports Awards.

IIDEA collaborates in various capacities with a number of acceleration programmes dedicated to the video game sector, of different shapes and sizes, aimed at helping teams and/or start-ups in the sector, from the early stages to those close to growth, to improve their business and business development skills and knowledge.



First Playable

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Games in Italy

Games in Italy is a label created by IIDEA to describe the Italian video games industry worldwide. The objective is to increase the international visibility of Made in Italy, to show the successes of the national video games industry and to explain why it is important to invest in Italian companies.



Tutto sui Videogiochi

Tutto sui Videogiochi is a portal for parents and educators created by IIDEA. It provides information on how to understand video games and have a positive gaming experience: guides, tutorials and recommendations on how to choose the most suitable titles, set parental controls and monitor use.



Italian Video Game Awards

The Italian Video Game Awards are the industry awards that recognise excellence in the video game sector in Italy. Organised by IIDEA since 2013, the initiative promotes the cultural and artistic value of video games made in Italy and promotes Italian talent and development studios from a global perspective.



Italian Esports Awards

The Italian Esports Awards are the awards that celebrate the Italian protagonists of competitive video games. The initiative, which will be organised by IIDEA from 2020, will highlight the teams, organisations and professional players who have stood out the most in the previous year, rewarding the best events and commercial activations, as well as the most followed content creators and casters.



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