ITALIAN GAME DEVELOPERS CENSUS

KEY FACTS

AESVI
ASSOCIAZIONE EDITORI SVILUPPATORI VIDEOGIOCHI ITALIANI

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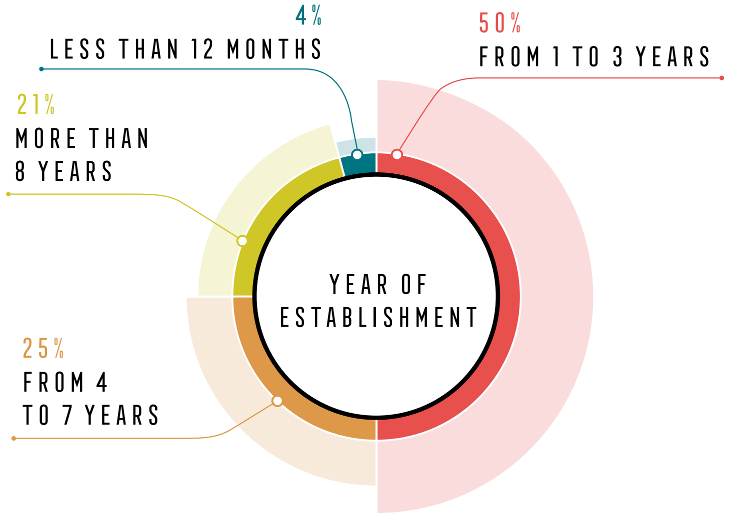
YEAR OF ESTABLISHMENT

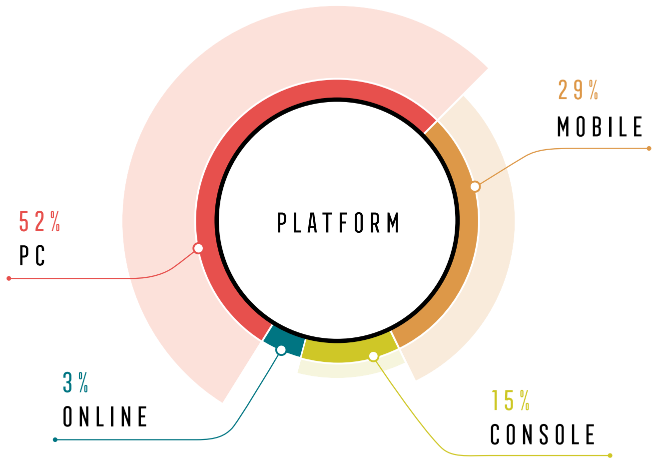
The majority of studios (54%) have been founded in the last 3 years, while 1 studio out of 5 has been operating in the market for more than 8 years.
The average age of a studio owner is 36, against 33 in the 2016 survey.

AVERAGE AGE OF OWNERS: 36



DEVELOPMENT PLATFORMS

Italian developers are mainly active in the development of PC videogames, with 52% of the studios working on this platform, versus 36% of 2016. Second in terms of importance is mobile development (29%). Then consoles (15%) and web gaming (2,5%) follow.



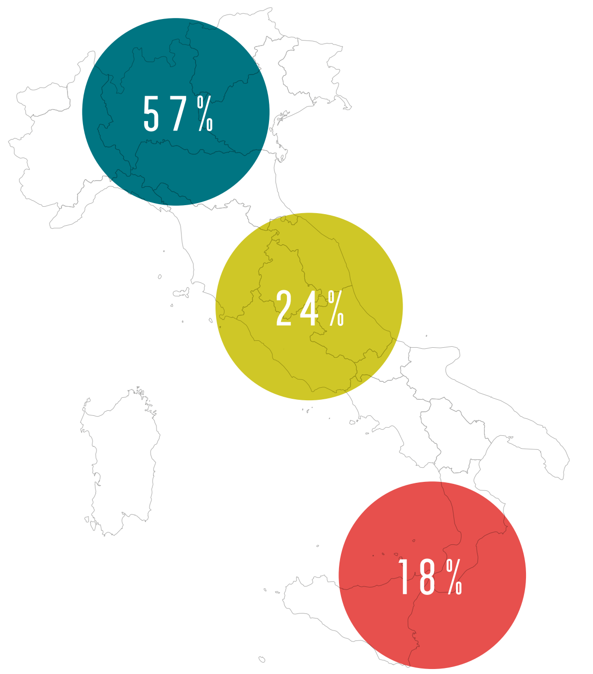
To date there are more than 125 videogame studios and around 1.100 people employed in the industry in Italy. Between 2016 and 2018, the number of employees grew by 10%.

1.100 EMPLOYEES

+125 COMPANIES IN ITALY

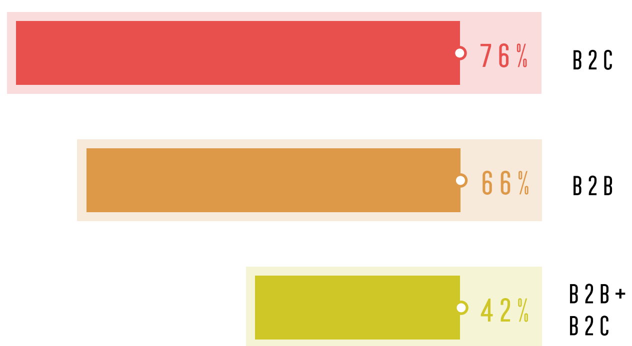
TERRITORIAL DISTRIBUTION

Northern Italy remains the main source of Italian game development, with 57% of the studios. Central Italy, with 24%, and Southern Italy and the isles with 18% are next. Regionally, Lombardy is still the region with the most studios operating in the territory (33%), followed by Lazio (14%) and Emilia Romagna (10%). At the provincial level, it's Milan (23%) and Rome (14%) with the highest numbers of development companies.



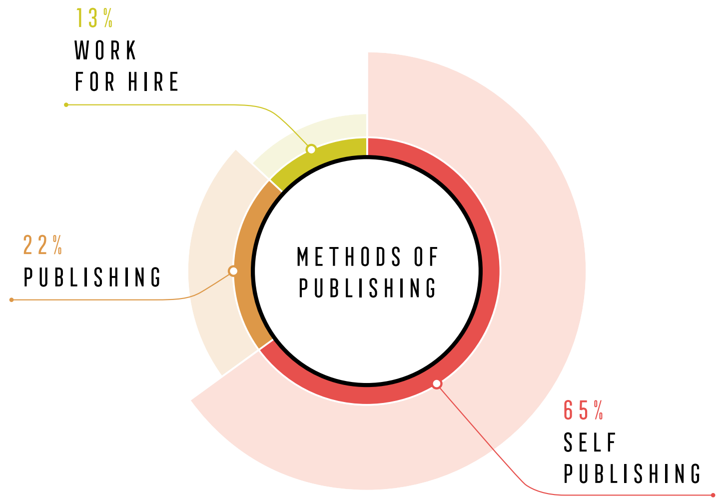
TARGET MARKETS

76% of Italian developers operate in the consumer market (B2C). 66% operate in the business market (B2B). 42% of the studios operate in both markets.



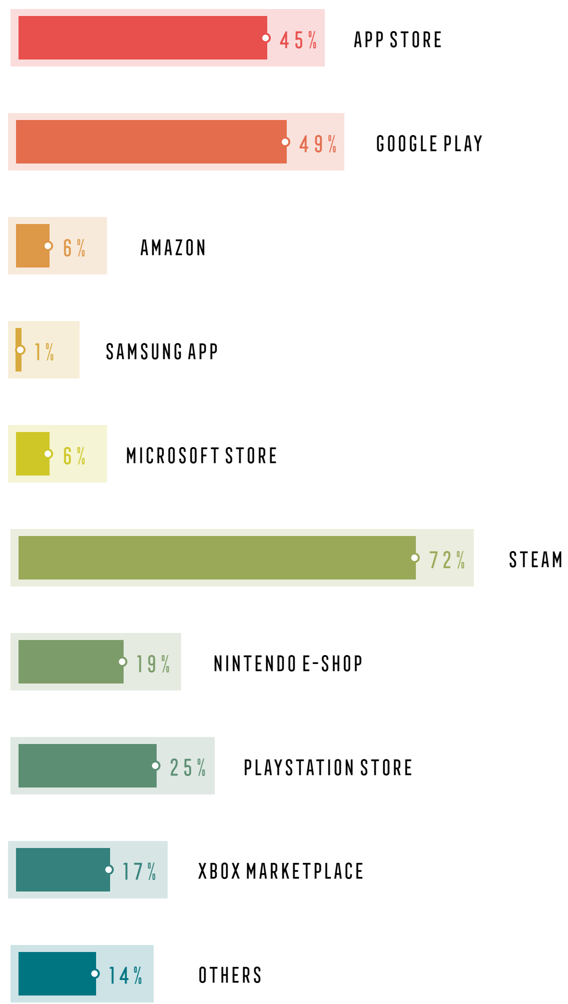
METHODS OF PUBLISHING

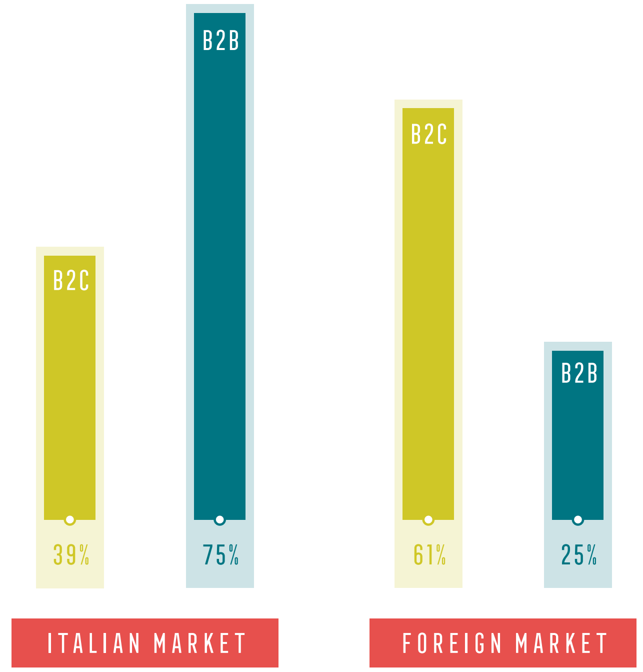
65% of studios rely on self-publishing, while 22% make use of a publisher to distribute their products.



MARKETPLACE

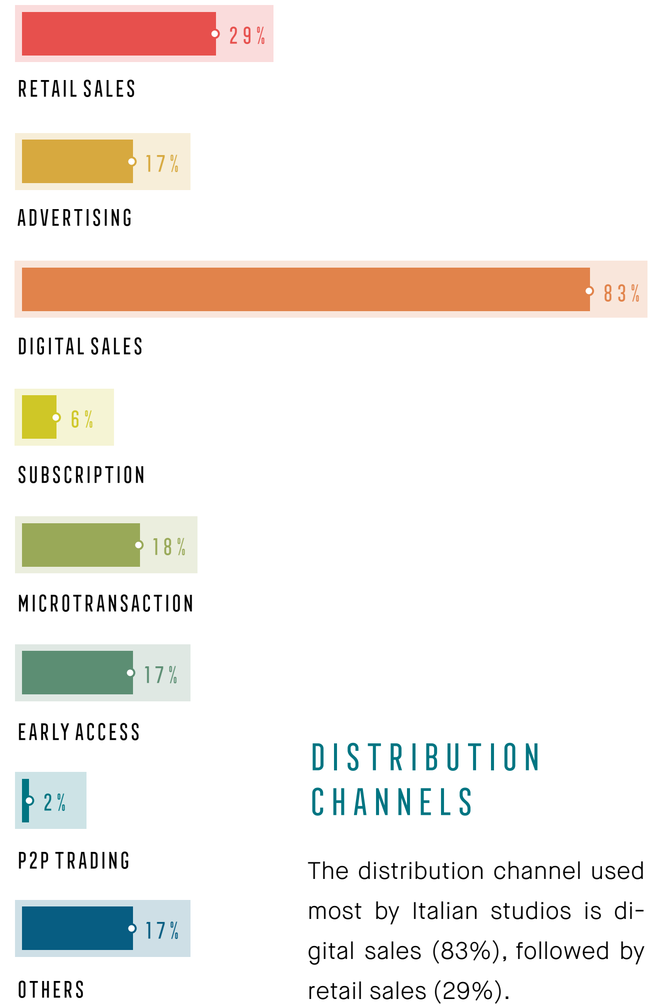
Italian game developers sell their videogames especially on Steam (72%) followed by Google Play (49%) and the App Store (45%).





INTERNATIONAL POSITIONING

With regards to the B2C sector, Italian development studios obtain 61% of their revenue from the foreign market and the remaining 39% domestically.
Concerning the B2B segment, the development studios acquire 75% of their revenue from the Italian market and 25% abroad.



DISTRIBUTION CHANNELS

The distribution channel used most by Italian studios is digital sales (83%), followed by retail sales (29%).

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