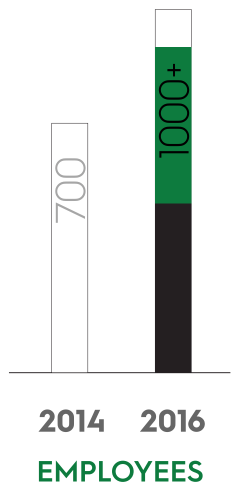
GAMES IN ITALY

AESVI
ASSOCIAZIONE EDITORI SVILUPPATORI VIDEOGIOCHI ITALIANI

ITALIAN GAME DEVELOPERS CENSUS 2016

KEY FACTS

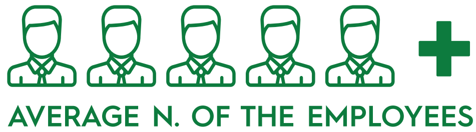


NUMBER OF COMPANIES AND EMPLOYEES

There are currently over 120 game development studios in Italy.

The number of people working in game development in 2016 is over 1.000 and has increased by almost 50% since 2014 (700).

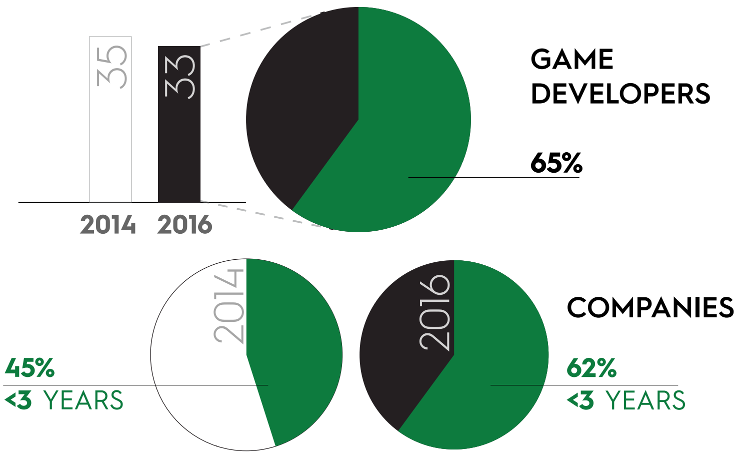
The average Italian game development studio has more than 5 employees.

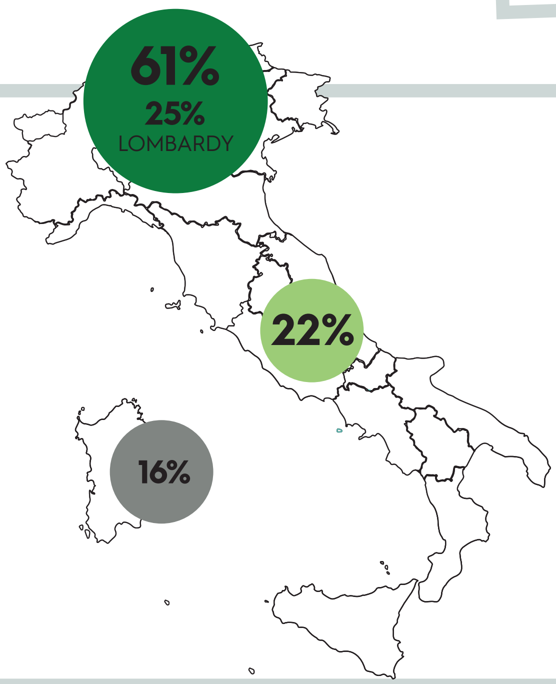


YEAR OF ESTABLISHMENT

The large majority of Italian game development studios have been established for less than 3 years, against 45% in the previous survey.

The average age of entrepreneurs and self-employed professional is 33 against the 35 years of age of the previous survey.





REGION DISTRIBUTION

Northern Italy hosts around 2/3 of Italian development studios (61%), followed by Central Italy (22%) and by the South (16%), including the islands. The province of Milan leads with over 22% of game development studios, followed by the province of Rome (12%). Also noteworthy are the cases of Turin (5%), Bologna (5%), Verona (4%) and Genoa (4%).

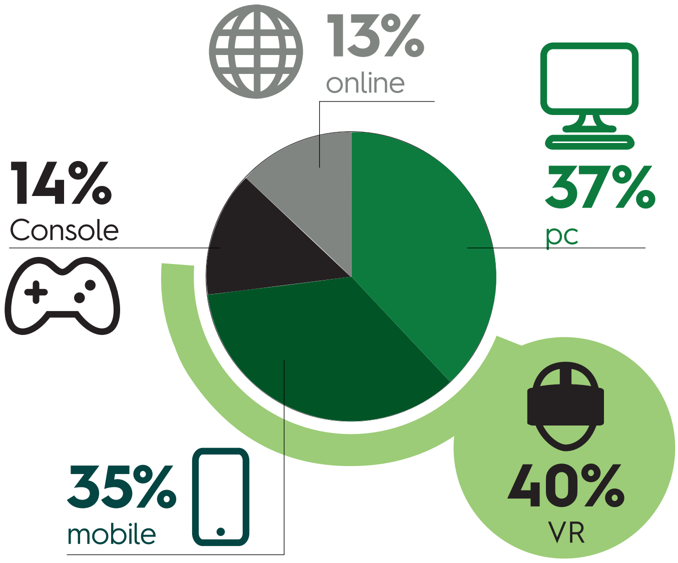
The leadership for the number of businesses is still held by Lombardy, confirming its growing trend (+1.1) and which alone hosts around 25% of Italian businesses.

DEVELOPMENT PLATFORMS

The Italian game developers appears to be concentrated particularly on two platforms: PC (37%) and mobile (35%). Fewer but still a significant number are for consoles (14%) and online gaming (13%).

Compared to the previous survey there has been an increase in development for PC (37% against 27%) and a fall in the mobile sector (35% against 47%).

A significant percentage of Italian game development studios (42%) develop videogames in virtual reality.



TARGET MARKETS

86% of the Italian game developers operate in the consumer market (B2C), whereas 61% operate on the business market (B2B). The vast majority of operators in the sector (52%) operates in both B2B and B2C markets.

INTERNATIONALIZATION

93% of Italian game development studios sell their titles in Europe, 83% in North America, 64 % in Asia and 58% in South America. On average, each company considered serves at least three out of the four market areas considered.

93% EUROPE **64% ASIA**

83% NORTH AMERICA

58% SOUTH AMERICA

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