Beyond 2021: Where does gaming go next?

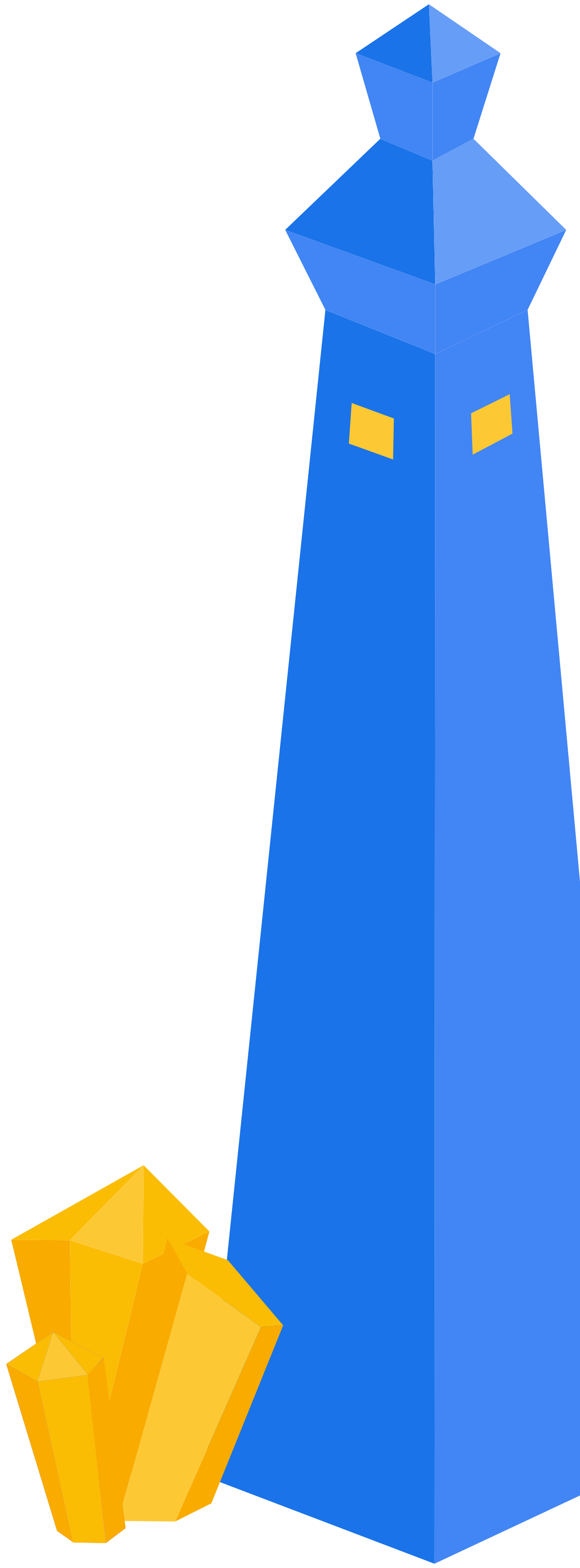
Europe, Middle East & Africa gaming market and consumer research report

Google for Games / newzoo

Foreword

This report is part of a series where we cover the lasting impact of engagement and spending trends on games of the period between February 2020 and June 2021. This report covers the Europe, Middle East & Africa (EMEA) region. The series is the result of research conducted by Newzoo commissioned by Google and contains a combination of market analysis, trend research, and consumer research.

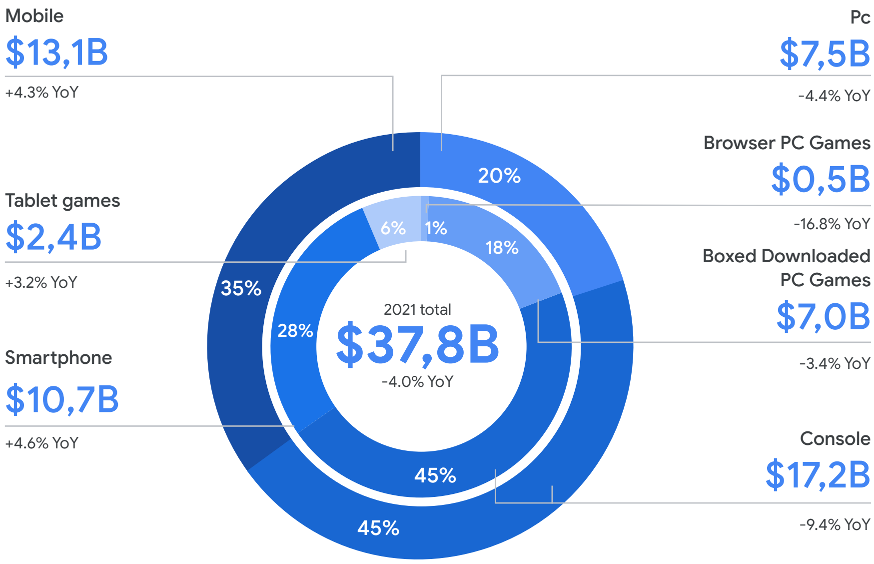
The EMEA gaming region and audience



Of the four regions covered by our research, EMEA is the most diverse, in both audience and market maturity. Western Europe is home to four of the world's ten largest gaming markets by consumer spending, the Middle East is one of the world's most promising growth markets, and gaming is becoming more accessible in many markets across Africa.

We focused on a diverse but representative set of markets throughout Europe and the Middle East and supplemented that with our market research to cover the entire EMEA region. While this report offers a comprehensive overview of gaming activity in the EMEA region during the pandemic period — February 2020 to May 2021 — we'll also highlight key differences between markets where appropriate.

Fig.1 | Consumer spending on games in EMEA, split by platform

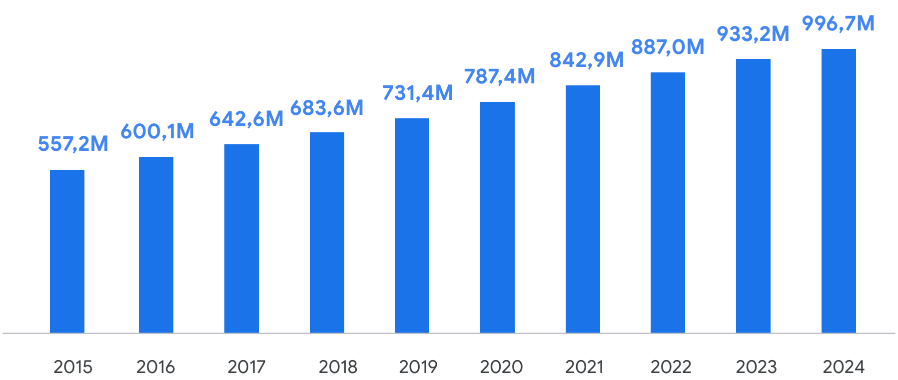


The $37.8 billion figure above represents 21% of global spending on gaming content, making EMEA the world's third-largest region by consumer spending. Console gaming represents the largest segment as of 2021, but spending on mobile games is growing most quickly.

Studying the region, we see an imbalance between the concentration of players and concentration of spending; Western Europe houses just over a quarter of the region's player population, but that group is responsible for 71% of the region's spending on games.

Consoles are the region's biggest segment by consumer spending on gaming software, largely due to players in these Western European countries. But the picture changes when we widen our angle to include Eastern Europe, MENA (Middle East and North Africa), and Sub-Saharan Africa.

Fig.2 | 2015 – 2024 EMEA player forecast



The $37.8 billion figure above represents 21% of global spending on gaming content, making EMEA the world's third-largest region by consumer spending. Console gaming represents the largest segment as of 2021, but spending on mobile games is growing most quickly

Where Western Europe's players prefer console games, gamers in the Middle East and Africa prefer mobile games. MENA houses 29% of the region's players, who together represent just 14% of total consumer spending. If we zoom in on mobile spending, however, that share jumps up to 25% — one-third greater than spending on mobile games by Eastern European players.

The region's gaming growth opportunities are as diverse as its platform preferences. In both Western and Eastern Europe, the pandemic period saw an acceleration of existing trends but no fundamental changes. One standout market is Turkey, where respondents expect to see increases in their gaming activity in the future equal to their increases in play time during the pandemic.

We do not see a significant change in gaming's importance to European players pre- and post-pandemic. When asked to rate the importance of gaming in their lives from 1 (lowest) to 7 (highest), players in Finland, the UK, Ukraine, Poland, and Russia — the European markets covered by this research -- report spending less time gaming than do players in other regions. Video games did play a larger role in their lives during the pandemic, but they expect its importance to decline in 2021 and beyond.

Fig.3 | Players per EMEA sub region % of total EMEA | 2021

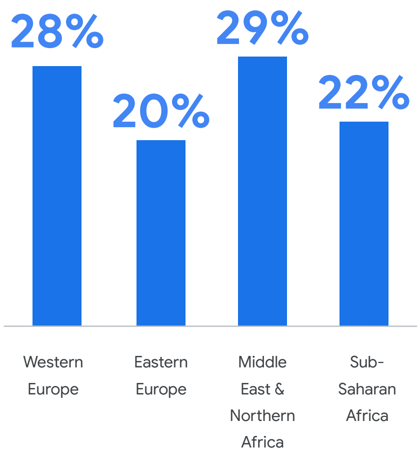
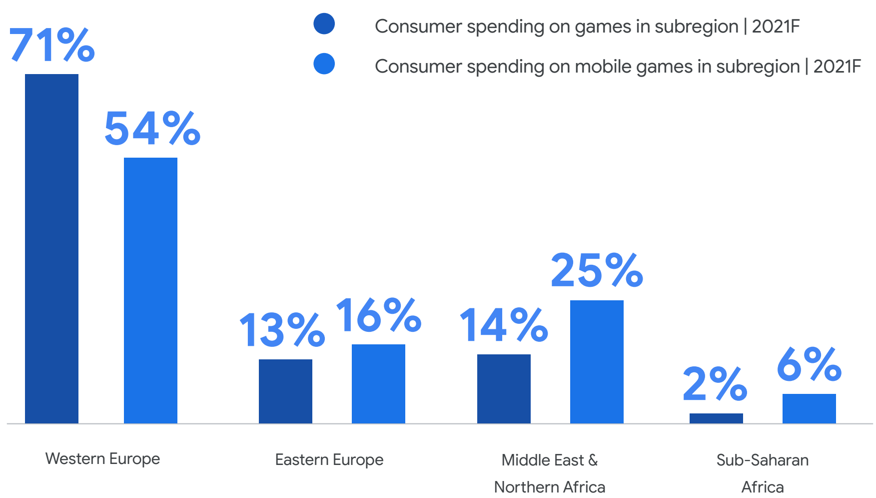


Fig.4 | Total gaming revenue & mobile gaming revenue per EMEA sub region 2021



One standout statistic from EMEA's gamers is average hours played per week, which at 12.4 hours is far below other regions. EMEA's gamers play 2.3 hours less per week than gamers in North America 3.2 hours less per week than players in Latin America, and up to 5 fewer hours than Asia-Pacific's players.

That's only one of several broad regional patterns we found among the surveyed markets. Eastern European countries expect a decrease in playing and viewing activity into 2021 and beyond, for instance, while Western European and Israeli gamers tend to have a moderately positive outlook on their future playing behavior. And from the importance of gaming in their lives to playing activity during and after COVID-19, the Turkish gaming audience stands out as exceptionally enthusiastic about their gaming future.

More so than any other region covered by this research, we advise practitioners to be aware of differences between the various EMEA markets. Western Europe is dominated by console, Eastern European players turn to PC most frequently, and the developing markets of the region are defined by mobile gaming.

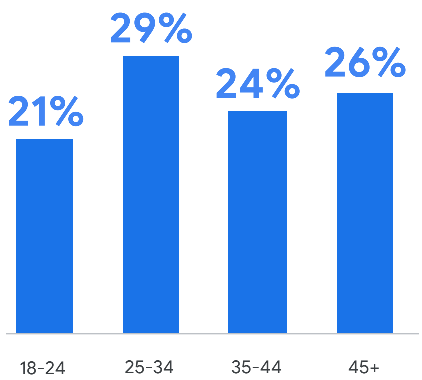
The EMEA market is unique in two ways: the high-spend-but-low-playtime habits of players in Europe, and the differing levels of platform dominance from market to market. We explore both themes in the next section, then go on to share how esports and live streaming can keep players engaged, even after they churn from playing.

Fig.5 | EMEA gamer demographics

Male **54%** Female **46%**

Age (average 35.6)

12.4 (average played hours per week)

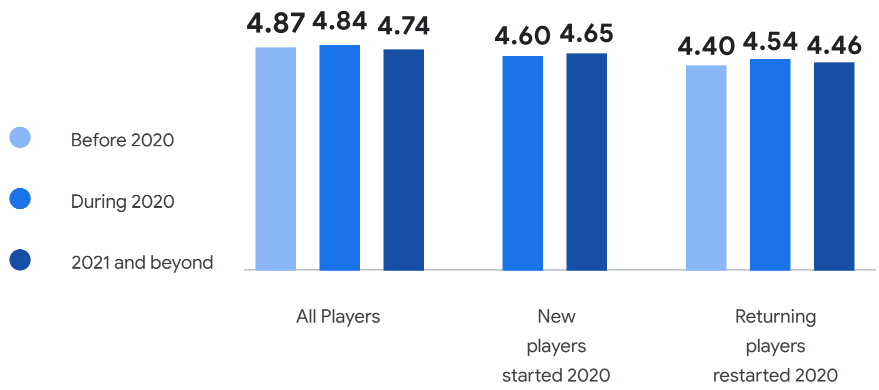


3% New players since 2020 (Base: 283)

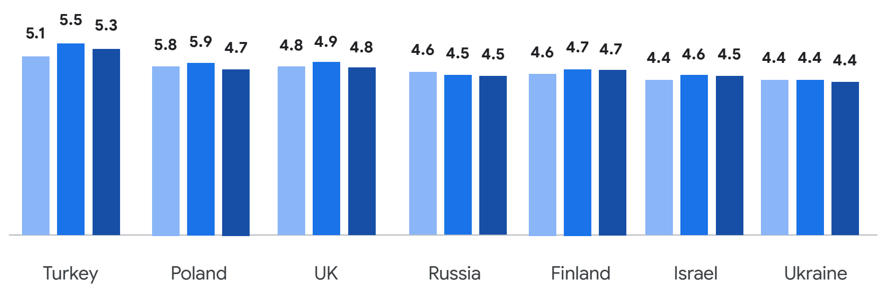
19% Returning players since 2020 (Base: 1,367)

78% Played before 2020 (Base: 5,719)

Fig.6 | Importance of video games (mean score out of 7) as rated by players in selected EMEA markets



Importance of video (mean score out 7)



Three themes that will shape EMEA

Theme 1: Revenue can rise even as playtimes drop

Players in EMEA report that their play time in the period between February 2020 and May 2021 increased, mostly so on mobile (+35% increase in activity from 2020), console (+36%), and gaming via the cloud (+38%), and only a bit less for PC gaming (+20%). Looking to the future, however, EMEA's audience is the only region where players expect their future play time to drop into 2021 and the years beyond.

For all four gaming platforms, play time will be permanently above its pre-2020 level, but the peak during those months will not be sustained. On top of the already-low weekly average play time reported during the research period compared to other regions, it means EMEA's players expect to play less than their peers in other regions.

Yet when we look to spending, that pattern does not hold. Consumer spending on games will continue its strong growth trajectory, particularly driven by spending on mobile games, which we forecast will grow to $17.6 billion by 2024 at a +12.7% CAGR.

Perhaps more important, EMEA players' average annual spend on games is on par with or higher than annual spend for players in other regions. The relationship between higher playtime and higher revenues, and vice versa, lower playtime leading to lower revenues, does not necessarily hold in EMEA.

Fig.8 | Growth in playing activity by platform between February 2020 and May 2021 and expected increase after May 2021

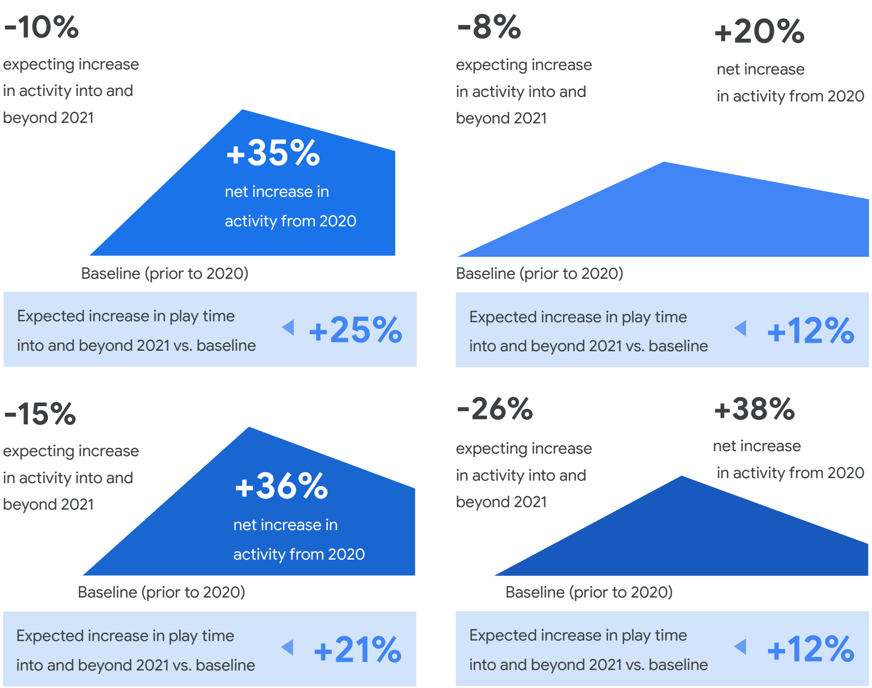
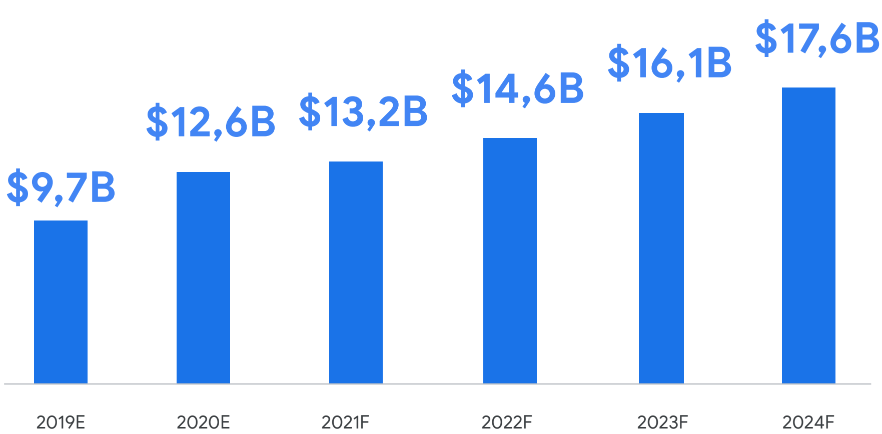


Fig.7 | Consumer Spending on Mobile Games | EMEA | 2019 - 2024



Call to action for developers

The simple fact is that many of EMEA's players, particularly in Europe, are willing to spend a lot on games even if they don't expect to devote as much time to the activity. Even dropping play time in the months after May 2021 won't directly result in a loss of revenues, but developers do need to design with local preferences in mind.

The fact that Europe's players spend high but don't play as much as others has critical design implications. It can mean:

- Offering shorter core gameplay loops so that EMEA's players can enjoy the same experience for a shorter time investment;
- Providing options to spend money to save time, such as accelerating building times, extra moves / steps, or the ability to unlock items and skins by purchasing directly from the store;
- Lowering focus on reward systems that aim to drive up play time and play session length, typically seen in battle pass or season pass models;
- Instead, focus on rewarding consistent play patterns, such as daily login bonuses or rewarding a first completed level or session per day.

These could all be keys to success in this region, which are far different from the success factors of other regions.

Theme 2: Platform usage and future activity levels will vary by market

Mobile is the most used platform in EMEA (70% of all players play on mobile), especially in Turkey, where 83% of players are mobile players.

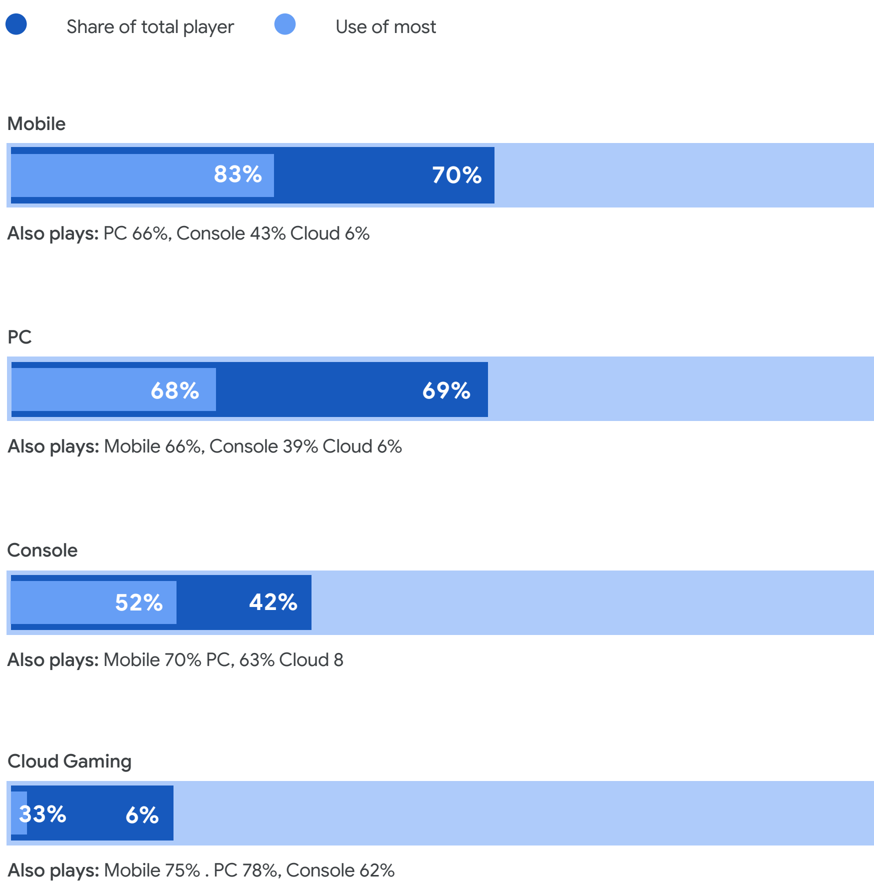
PC use exceeds mobile use in Poland (79%), Russia (77%), and Ukraine (73%). This is unique from a global perspective; Eastern Europe is the only region where PC is the most used platform. Players in Turkey also play PC in high numbers (76%) but not as much as mobile.

Console attracts fewer players than PC and mobile gaming across the entire region, but not for certain specific markets. Consoles are disproportionately popular in the UK, where their 69% share dwarfs any other platform. Console share is also relatively high in Poland (59%) and Finland (57%). Players in these countries also typically have larger budgets for gaming software, which is why console gaming is EMEA's largest segment by consumer spending. The Western European console market is the second-largest console market by consumer spending worldwide, trailing just North America.

• **Cloud gaming** services attract a very small share of EMEA players - lower than its share in Asia and LATAM, for

The Western European console market is the second-largest console market by consumer spending worldwide, trailing just North America

Fig.9 | Player share per platform in selected EMEA markets, including preferred platform



example. Only in Turkey (9%) and Poland (8%) does it approach levels seen in other regions. It's likely that the accessibility of high-end gaming PC and consoles means that cloud gaming has a smaller addressable market in Europe.

As we covered in the first theme of this report, players in EMEA generally expect to play less than they did during 2020, although future activity is still expected to be higher than it was at the start of 2020.

Quite the opposite is true in Turkey. Mobile games boosted gaming's popularity in the Middle East and Northern Africa, which is also the fastest-growing sub-region by consumer spending. Turkish players expect to continue to increase their play time into 2021 and the years beyond on all platforms.

On the other side of the spectrum, players in Eastern Europe (Russia and Ukraine) are negative about their future playing behavior, almost completely cancelling out their increase since the pre-2020 baseline.

Players in Israel, the UK, Finland, and Poland, meanwhile, are more moderate but still expect a small playing decrease in the future.

However, indicated future behavior isn't necessarily a foregone conclusion, and attitudes towards gaming and gaming culture don't directly correspond to behavior– especially not in EMEA, where there is a history of players underestimating time and money spent on gaming.

Despite the survey implications, gaming activity and spending spiked during the pandemic; respondents' gaming activity in this period increased between 20% to 36%, depending on platform. In 2020, this increased gaming activity generated an additional $4.1 billion in consumer spending on gaming content. Furthermore, Western European countries historically rank among the top countries by consumer spend on gaming, and average spend per player is typically high as well.

However, indicated future behavior isn't necessarily a foregone conclusion, and attitudes towards gaming and gaming culture don't directly correspond to behavior– especially not in EMEA, where there is a history of players underestimating time and money spent on gaming

Mobile games boosted gaming's popularity in the Middle East and Northern Africa, which is also the fastest-growing sub-region by consumer spending

Call to action for developers

By preferred platform, role of gaming, and future expectations, the EMEA gaming audience is as diverse as it gets. While players in many European countries do indicate that they plan to play less in the future, that doesn't mean this audience should be ignored, especially by console and PC developers.

The pandemic ushered in a new audience; now it's up to publishers and developers to keep them engaged as circumstances change. Focusing on retention will be critical for continued success. For that retention, EMEA's high level of market variance doesn't allow for a one-size-fits-all solution. Developers who can provide the region's disparate audiences with the variety of gaming experiences they seek are most likely to succeed.

For European players, that can be focusing on increasing revenues from the same audience as discussed in the first theme, but platform preference differs between Western Europe (console) and Eastern Europe (PC). Yes, players in EMEA on average might be less enthusiastic about future gaming activity than their peers in other regions, but that outlook doesn't always match their actual behavior.

The Middle East is a growth market with huge potential, and Turkey is a great market to focus on for developers looking to expand their audience.

Theme 3: Game video content is key for player retention

EMEA's players are positive about their consumption of esports content and live streamed game content going forward, doubling down on the roughly 30% growth in activity between February 2020 and May 2021.

Within specific audiences in EMEA we find considerable differences. In Turkey, the UK, and Poland, players expect to watch more live streamed game content in the future compared to 2020 by +43%, +30%, and +25%, respectively. Everywhere else, audiences forecast a small decline, but consumption of live streamed game content remains well above the baseline set before February 2020.

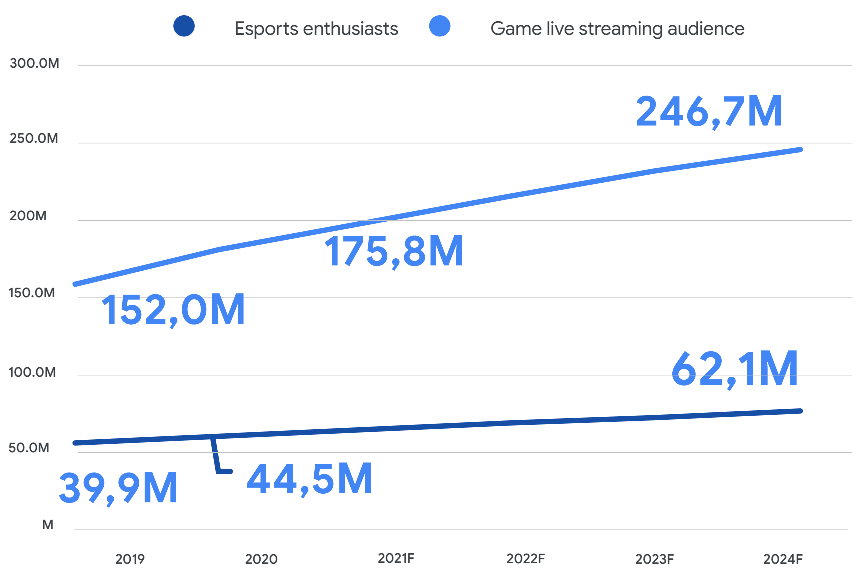
Another interesting finding is of returning gamers' differing expectations about playing and viewing. Whereas returning players are the most likely to churn from playing, they expect to continue watching at a rate similar to 2020 (up +24% for streamers and content creators and +30% for esports). After putting down their controllers, a large number of players continue to watch.

These 'lapsed gamers' are why the audience for gaming content is expected to keep growing even if players stop playing. Consuming content is a low-investment way for fans to stay engaged even after they churn from playing; perhaps they can be lured back into playing with the right activations or motivation — for example, being offered in-game content while viewing, or discovering a new title through a favorite.

Along with the many players in the region who both play and watch, lapsed gamers can be a significant driver for games market growth in EMEA. Esports enthusiasts – fans who watch esports content at least once a month – and the audience for live streamed game content – those who watch gaming live streams at least once every six months – are growing much more rapidly than the player base; we expect the number of esports enthusiasts in EMEA will grow to 62.1 million by 2024, representing a CAGR of +9.3% from 2019 to 2024 — the highest growth rate of any region.

Similarly, the audience for live streamed game content is expanding rapidly; we expect a +10.2% CAGR between 2019 and 2024 to 246.7 million - second in growth only to Latin America. While the outlook for consumption of esports and live streamed game content is trending up, in EMEA that doesn't extend to usage of gaming worlds as platforms to socialize, as it does in other regions. Net growth in usage of most online social tools isn't expected to change significantly into 2021 and beyond; the relatively low importance of gaming in EMEA means players are less inclined than those in other regions to centralize their social lives in games

Fig.10 | Esports enthusiasts and live streaming audience in EMEA | 2019 - 2024



Final thoughts

Of the four regions covered in this research project, EMEA is the only one whose players expect their gaming activity to decrease in the coming period — despite playing, spending, and watching data suggesting otherwise. Generally, this audience has the lowest expectations for their future gaming activity, but we still expect their activity to stay above pre-pandemic levels.

While these conclusions might dissuade some from investing in EMEA, it's worth noting that spending on games in several Western European countries is close to the world's highest average spend, and future expected increase in play time in Turkey is among the highest of the markets included in this research. Consumer spending on games can rise even if play time does not, but it does require developers and publisher to adapt, by rewarding shorter play sessions and offering spending options that save time - which might be the exact opposite strategy applied in other regions where players have more time but are less inclined to spend.

There's no one-size-fits-all strategy for the EMEA market. Differences between markets and sub-regions in EMEA are larger than any other region. The most popular platform to play goes from console in Western Europe, to PC in Eastern Europe, to mobile in the Middle East. Similar differences are observed in future expected play time. As noted, Turkish players are extremely positive about their future play time, where players from the UK and Poland, by contrast, are very positive about their viewing activity in 2021 and beyond.

Finally: participation in gaming culture by watching esports or live streamed game content is quite common in EMEA, and both the number of esports enthusiasts and the audience for live streamed game content are growing rapidly. There's an opportunity here to keep churned players engaged through this content and lure them back through effective partnerships.

Country profile

U.K.

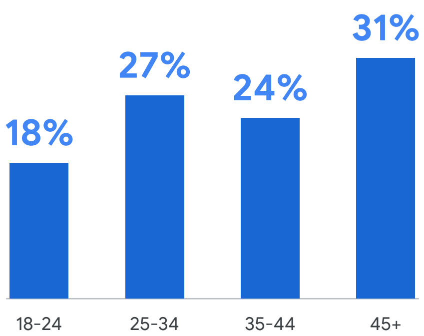
The U.K. boasts brand targeting opportunities for 45+ demographics. Into 2021 and beyond, viewing engagement will increase while playing will decrease slightly.

Almost a third of gamers surveyed in the U.K. are over the age of 45. On average, gamers in the U.K play for 13.2 hours per week, representing relatively strong playing engagement. The country's net increase in activity from the start of 2020 is up across all segments—playing and viewing alike. However, the expectation is that net engagement will decrease across all playing platforms going into 2021. Mobile will see the steepest decrease, owing to its low barrier to entry and therefore low barrier to exit. PC and console's decreases are modest, and stickiness for viewing engagement remains positive: +13% expected net increase in streaming-viewing activity into and beyond 2021, and +20% for esports. While the U.K is a mature market, there are plenty of growth opportunities in the streaming and esports scenes, and consumers in Britain have a proven appetite for playing games.

Gamer demographics

U.K. profile

Male	Female	Age (average)
53%	47%	37.7



3% New players since 2020 (base: 27)

13% Returning players since 2020 (base: 137)

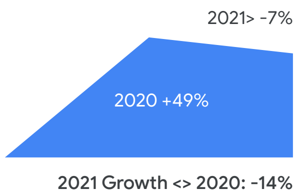
84% Played before 2020 (base: 873)

13.2h Average played hours per week

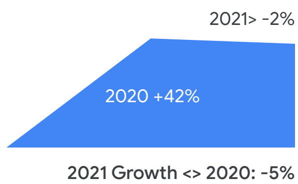
Engagement KPIs

Charts show players who report/expect to play more MINUS players who report/expect to play less

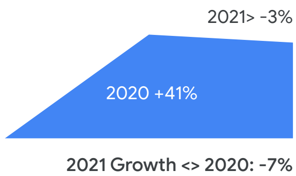
Mobile



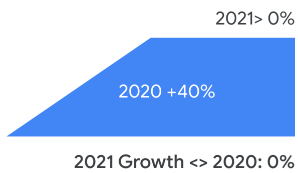
Console



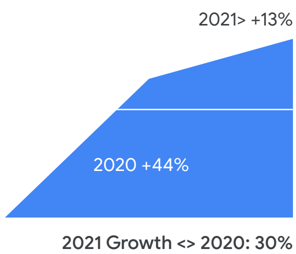
PC



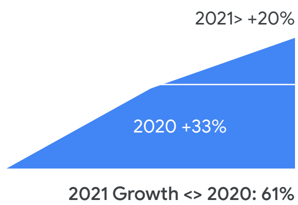
Cloud



Watching streamers



Watching esports



Definitions

2020 = Net % increase in activity from the start of 2020*

2021> = Net % expecting increase in activity into and beyond 2021

2021 Growth <> 2020 = rate of expected growth compared to 2020*

Notes/ questions: * Players reporting an increases, minus those reporting a decrease (note: 2020 figure counts all new players as an increase). ** The projected future net increase divided by 2020's net increase. A12: Since the start of 2020, have you been playing/ watching more, less, or about the same amount, compared to before? (all respondents playing/ watching). F3: How if at all, do you think this might change, once things stabilize, after COVID-19? (all respondents playing / watching)

Russia

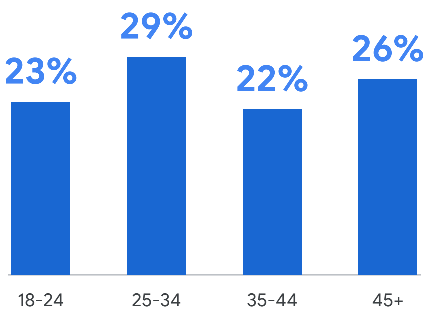
The Russian games market will face engagement-growth challenges into 2021 and beyond, but there remain opportunities (especially in viewing segments).

Russia's gamers are relatively equally split in terms of the four age groups, with an average age of 34.9. The country's gamer gender split (46% women) is slightly below the global average (48% women). Russia saw a positive net increase in playing activity from the start of 2020 across all segments but PC, which saw a slight decline of -2% from the beginning of 2020. That said, the expectation is that net engagement in engagement across all segments will decrease into and beyond 2021—for viewing and playing engagement alike. Cloud will see the steepest decrease into 2021 (-29%), while watching streamers will see the gentlest (-1%). While there are certainly plenty of opportunities in Russia's games, streaming, and esports markets, there may be growth challenges ahead compared to other markets covered in this report.

Gamer demographics

Russia profile

Male	Female	Age (average)
54%	46%	34.9



3% New players since 2020 (base: 33)

19% Returning players since 2020 (base: 206)

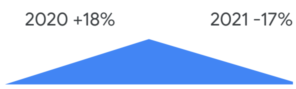
78% Played before 2020 (base: 830)

11.2h Average played hours per week

Engagement KPIs

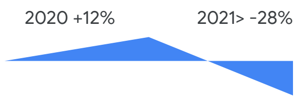
Charts show players who report/expect to play more MINUS players who report/expect to play less

Mobile



2021 Growth <> 2020: -94%

Console

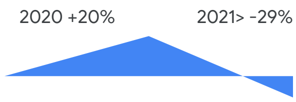


2021 Growth <> 2020: -233%

PC

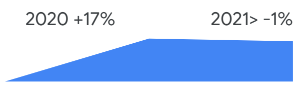
2021 Growth <> 2020: -750%

Cloud



2021 Growth <> 2020: -145%

Watching streamers



2021 Growth <> 2020: -6%

Watching esports

2021 Growth <> 2020: -73%

Definitions

2020 = Net % increase in activity from the start of 2020*

2021> = Net % expecting increase in activity into and beyond 2021

2021 Growth <> 2020 = rate of expected growth compared to 2020*

Notes/ questions: * Players reporting an increases, minus those reporting a decrease (note: 2020 figure counts all new players as an increase). ** The projected future net increase divided by 2020's net increase. A12: Since the start of 2020, have you been playing/ watching more, less, or about the same amount, compared to before? (all respondents playing/ watching). F3: How if at all, do you think this might change, once things stabilize, after COVID-19? (all respondents playing / watching)

Israel

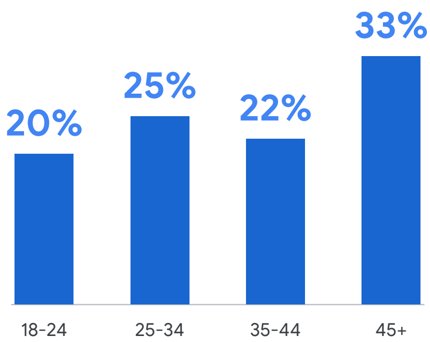
In terms of play time, Israel's gamers are the least engaged of all the markets covered. While playing engagement saw an increase from 2020, much of this will not stick.

With 71% of Israel's gamers identifying as men, the market's gender split is more male-heavy than any other covered in this report. As more than a third of respondents are in the 45+ age group (second only to Ukraine in this analysis), Israel's gamers skew older with an average age of 37.7, which may represent a targeting opportunity for some brands. On average, gamers in Israel play for 7.7 hours per week, the lowest of all markets covered and less than half the average hours in China, Japan, and Brazil. All segments saw engagement growth from the start of 2020. Nevertheless, in terms of playing engagement into and beyond 2021, Israel will see a modest net reduction in activity across all segments.

Gamer demographics

Israel profile

Male	Female	Age (average)
71%	29%	37.7



7% New players since 2020 (base: 70)

21% Returning players since 2020 (base: 229)

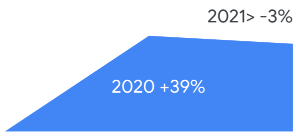
72% Played before 2020 (base: 760)

17.7h Average played hours per week

Engagement KPIs

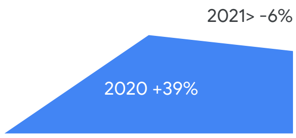
Charts show players who report/expect to play more MINUS players who report/expect to play less

Mobile



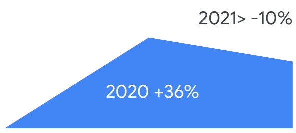
2021 Growth <> 2020: -8%

Console



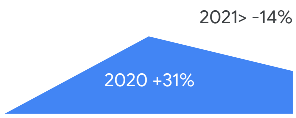
2021 Growth <> 2020: -15%

PC



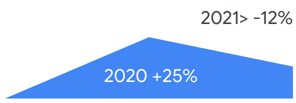
2021 Growth <> 2020: -28%

Cloud



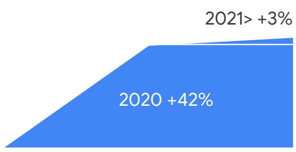
2021 Growth <> 2020: -45%

Watching streamers



2021 Growth <> 2020: -48%

Watching esports



2021 Growth <> 2020: 7%

Definitions

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2021 Growth <> 2020 = rate of expected growth compared to 2020*

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Ukraine

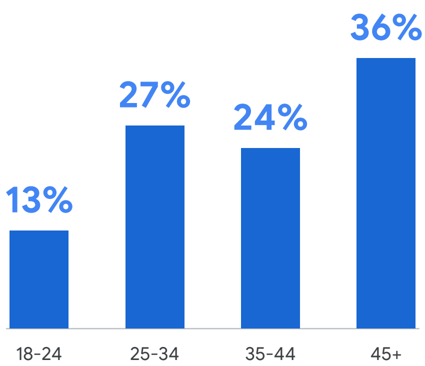
Engagement KPIs suggest that streamed gaming-related video content is one of the most viable investments within Ukraine's games market.

Ukraine has the highest share of 45+ gamers (36%) and the lowest share of gamers aged 18-24 (13%), giving the country's gamers an average age of 38.9. While Ukraine may not be the first choice for reaching younger consumers, the market may present opportunities to reach older demographics. Players in Ukraine became more engaged across all platforms from the start of 2020. However, PC's increase was marginal (just +1%). Engagement will drop into 2021 and beyond for all segments. Console's decrease is less pronounced (-5%), but PC's 2021 engagement will drop below 2020's levels, perhaps indicating greater long-term opportunities on mobile and cloud. Looking at viewership, esports engagement saw significant growth (+23%), while streaming engagement saw marginal growth (+2%). Both will see slight drops into and beyond 2021, with esports falling below 2020's engagement levels. Again, this suggests streamed gaming-related video content is the better investment in Ukraine.

Gamer demographics

Ukraine profile

Male	Female	Age (average)
58%	42%	38.9



4% New players since 2020 (base: 36)

23% Returning players since 2020 (base: 241)

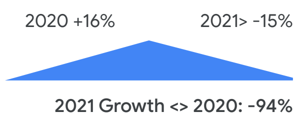
73% Played before 2020 (base: 753)

9.8h Average played hours per week

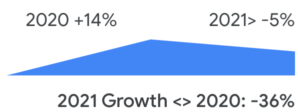
Engagement KPIs

Charts show players who report/expect to play more MINUS players who report/expect to play less

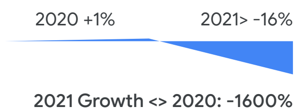
Mobile



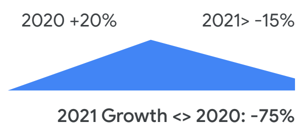
Console



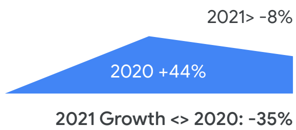
PC



Cloud



Watching streamers



Watching esports

Definitions

2020 = Net % increase in activity from the start of 2020*

2021> = Net % expecting increase in activity into and beyond 2021

2021 Growth <> 2020 = rate of expected growth compared to 2020*

Notes/ questions: * Players reporting an increases, minus those reporting a decrease (note: 2020 figure counts all new players as an increase). ** The projected future net increase divided by 2020's net increase. A12: Since the start of 2020, have you been playing/ watching more, less, or about the same amount, compared to before? (all respondents playing/ watching). F3: How if at all, do you think this might change, once things stabilize, after COVID-19? (all respondents playing / watching)

Turkey

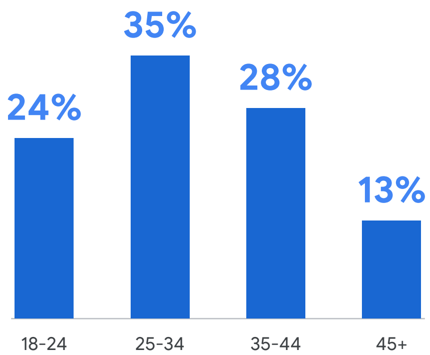
Turkey's gamers are highly engaged. All engagement KPIs increased from 2020, with even more growth expected into the future.

Turkey's gender split among gamers is almost equal. In terms of age, nearly two-thirds of gamers in Turkey fall into the 25-45 bracket. Many in this age group are full-time workers, meaning they likely had more free time owing to work-from-home measures. To that end, engagement was up from the start of 2020 for all segments (viewing and playing). Interestingly, every segment will see further growth into 2021 and beyond as well. In terms of playing, console engagement is the stickiest, with a +26% net increase in engagement into 2021. Gamers surveyed in Turkey play for an average of 15.7 hours a week, signifying high engagement. Esports engagement will grow even more into 2021 and beyond (+33%), pointing to plenty of advertising and branding opportunities in the market.

Gamer demographics

Turkey profile

Male	Female	Age (average)
52%	48%	32.5



7% New players since 2020 (base: 70)

22% Returning players since 2020 (base: 232)

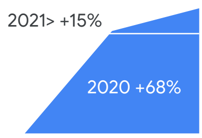
71% Played before 2020 (base: 750)

15.7h Average played hours per week

Engagement KPIs

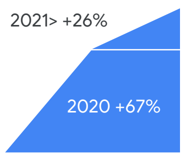
Charts show players who report/expect to play more MINUS players who report/expect to play less

Mobile



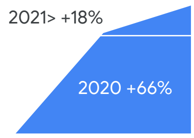
2021 Growth <> 2020: 22%

Console



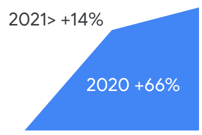
2021 Growth <> 2020: 39%

PC



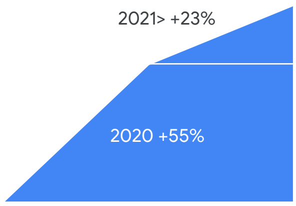
2021 Growth <> 2020: 27%

Cloud



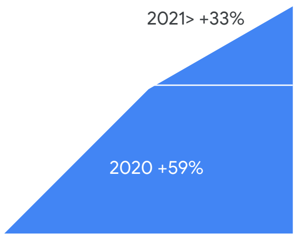
2021 Growth <> 2020: 21%

Watching streamers



2021 Growth <> 2020: 42%

Watching esports



2021 Growth <> 2020: 56%

Definitions

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Poland

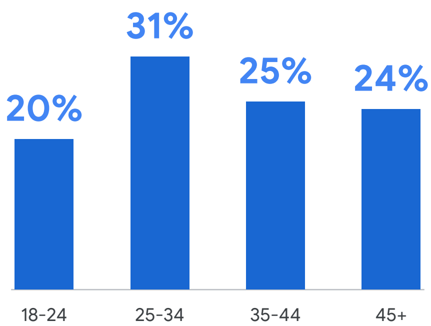
Much of Poland's higher playing engagement from 2020 will not stick; however, future engagement growth is more promising for viewing segments.

The average age of gamers in Poland is 35.4, with a somewhat even spread across the four age groups. On average, the market's gamers play for 13.6 hours per week, slightly more than the two neighboring countries that we cover in this report (Russia and Poland). Like most other markets, Poland saw consistent increased engagement across all segments from 2020. Increases were mostly consistent across the main playing segments of console (+35%), mobile (+35%), and PC (+32%), but cloud's growth was even larger (+44%). However, engagement from 2020 into 2021 and beyond will decrease. These 2021-and-beyond reductions will be mostly uniform across mobile, console, PC, and cloud. However, growth will continue into 2021 and beyond for esports and streaming engagement, which will grow +8% and +10%, respectively.

Gamer demographics

Poland profile

Male	Female	Age (average)
53%	47%	35.4



2% New players since 2020 (base: 24)

19% Returning players since 2020 (base: 201)

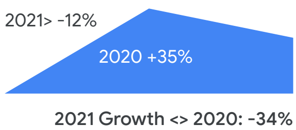
79% Played before 2020 (base: 826)

13.6h Average played hours per week

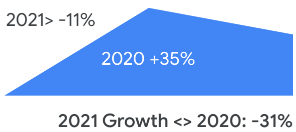
Engagement KPIs

Charts show players who report/expect to play more MINUS players who report/expect to play less

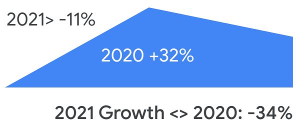
Mobile



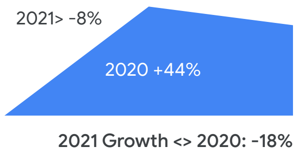
Console



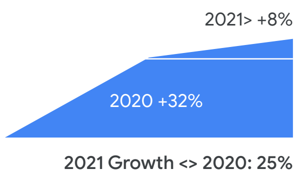
PC



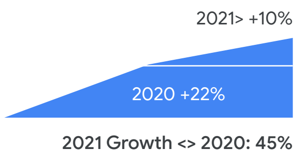
Cloud



Watching streamers



Watching esports



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Finland

While all segments saw engagement growth in Finland from 2020, only cloud will stick into 2021. Finland's cloud gaming market is one to watch.

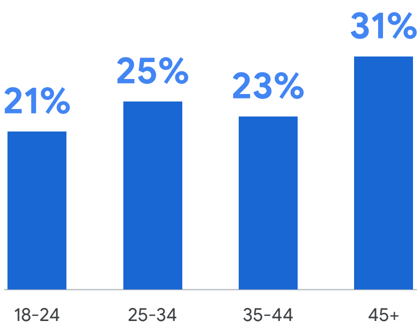
In terms of the demographics covered in this report, gamers in Finland skew male (59% are men) and older (more than half are 35+). Mobile and cloud engagement grew significantly from 2020 (+36%) for both. Console and PC engagement also grew from 2020 (+24% for both). However, mobile will see a slight drop into and beyond 2021 (-12%). Console and PC engagement will also drop slightly into 2021 and beyond but more moderately (-5% each).

Interestingly, cloud gaming engagement remains static into 2021 and beyond, signifying the stickiness of Finland's cloud gamers and making the country one to watch for cloud adoption and developments.

Gamer demographics

Finland profile

Male	Female	Age (average)
59%	**41%**	**37.2**



2% New players since 2020 (base: 23)

11% Returning players since 2020 (base: 121)

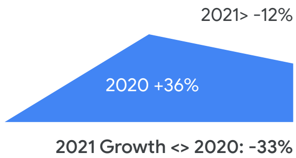
87% Played before 2020 (base: 927)

10.6h Average played hours per week

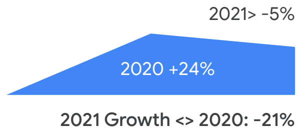
Engagement KPIs

Charts show players who report/expect to play more MINUS players who report/expect to play less

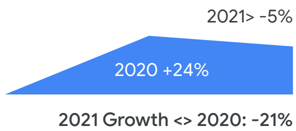
Mobile



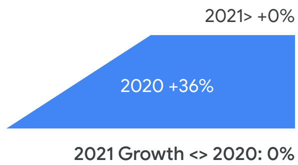
Console



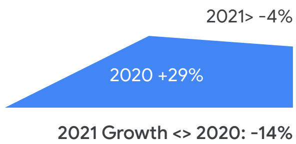
PC



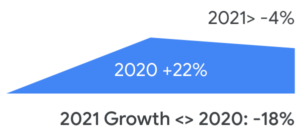
Cloud



Watching streamers



Watching esports



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Methodology

This is a research commissioned by Google to Newzoo. It is based on Newzoo's games market sizing and forecast. At the highest level, Newzoo focuses on three key metrics for every market: players, paying gamers, and revenues AKA consumer spending. Newzoo defines a market as a country or geographic region in combination with one or more game segment(s), e.g. PC, console, or mobile. The data on players and payers is mainly based on Newzoo's proprietary consumer research survey, which runs annually between January and April in 33 markets. Revenue data comes from Newzoo's predictive games market model, which uses a top-down approach to market sizing. Newzoo incorporates macroeconomic and census data from the IMF and UN, such as household income and GDP per capita, transactional and app store revenue data from Newzoo's data partners, primary consumer research, partner data, detailed financial information reported by more than 100 public companies, and third-party research. Newzoo also receives valuable input from clients, often leading international game companies.

The results presented in this report were sourced via an online survey, designed and conducted by Newzoo in April and May 2021 among 7,369 respondents from Finland, Israel, Poland, Russia, Turkey, Ukraine, and the United Kingdom. Quotas were set to ensure a nationally representative sample of gamers from each country. Respondents were 18 to 65 years old and were current players of video games (any platform).