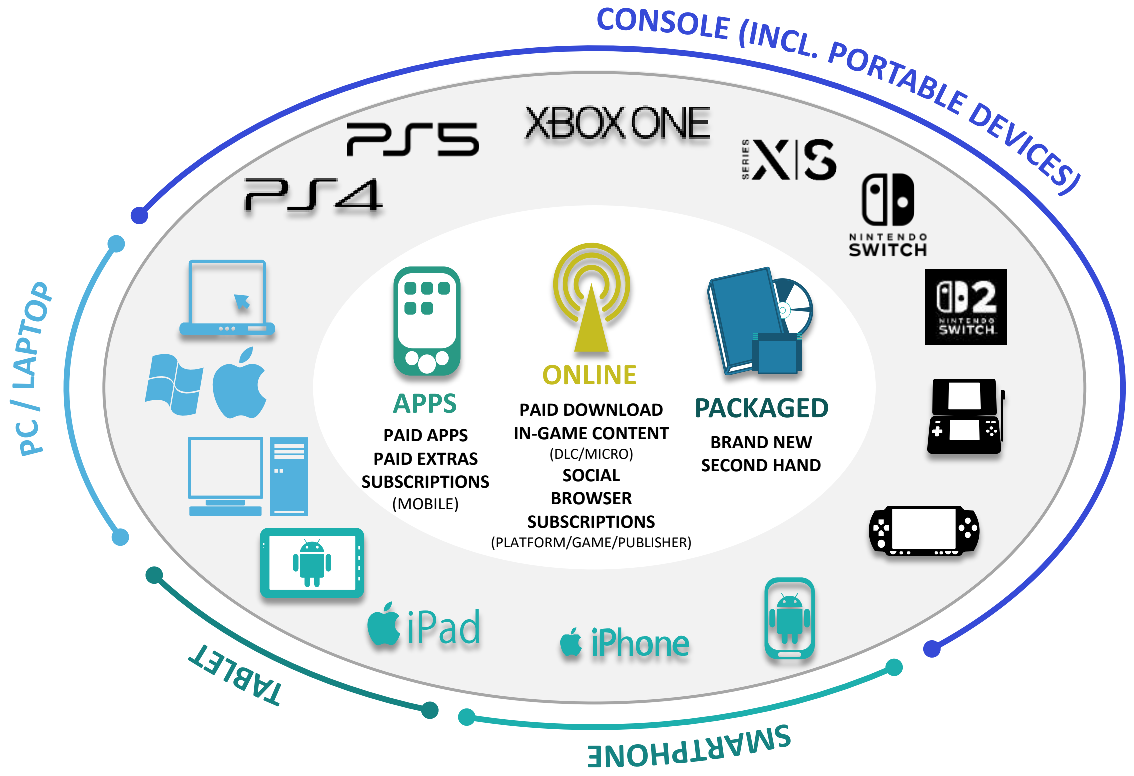
Italian Interactive Digital Entertainment Association

ESSENTIAL FACTS ABOUT VIDEO GAMES IN ITALY IN 2025

GAMETRACK

VIDEOGAMESEUROPE

Total understanding of the video game market



EXTERNAL DATA FROM VIDEO GAME SALES

GSD SensorTower

VIDEO GAME PLAYERS (REACH & SIZE)

ENGAGEMENT (GAMING TIME)

REVENUE (VIDEO GAME SALES)

$£€

All devices
Consoles, PCs, Smart Devices, Children devices & Internet TVs

All formats
Physical, Online, Apps & Subscriptions

Broader demographic
6-75 yrs old population

Larger geographic coverage
16 markets within Europe

Online + Offline method
c3,000 yearly online surveys + c1,000 F2F surveys every three years

13 years of results
long lasting tracking study (Europe5)

GameTrack 2025 methodology has undergone revisions, generating limitations for like-for-like comparisons due to changes in sample definitions, questionnaire and methodology. Revenue estimates now integrate a wider set of subscriptions to video game services.

Ipsos

ITALY: 2025 KEY INSIGHTS

1 **3 IN 10 (29%) OF ALL 6 TO 75 YRS OLD ITALIAN POPULATION PLAYED VIDEO GAMES DURING 2025 – VERY CONSISTENT VS 2024.**
There is an estimated 14.2m video game players at the end of 2025 in Italy (32% amongst 6 to 64 yrs old, consistent vs 33% 2024- Q4).
Reach is far higher amongst males (35% vs 22% amongst women) and strong but concentrated amongst younger 6 to 24 yrs old (ranging from 52% to 62%).
Consequently, Italian player profile is heavily skewed towards men (60% vs 39% women) and younger, with 3 in 5 being under 35s.

2 **REVENUE FROM VIDEO GAME HARDWARE (INCL. ACCESSORIES) AND VIDEO GAME SALES (INCL. SECOND-HAND SALES) REACHED €2.4 BILLION BY 2025. THIS FIGURE INDICATES A RELATIVELY STABLE POSITION COMPARED TO 2024, WITH ONLY A MARGINAL YEAR-ON-YEAR DECREASE OF 1%.**
Hardware sales from consoles saw a YoY increase of 3%, reaching nearly €400 million in 2025, while accessory sales dropped by 5% compared to 2024, resulting in €152 million. Video game sales constituted more than three-quarters (77%) of the overall video game industry, generating a substantial €1,8bilion.

3 **ON THE OTHER HAND, GAMING TIME HAS INCREASED OVER TIME WITH PLAYERS NOW INVESTING 7HRS 53MIN PER WEEK GAMING ACROSS DEVICES. DESPITE THIS HIGHER ENGAGEMENT, YEARLY ESTIMATES FROM VIDEO GAME SALES IS FAIRLY FLAT vs 2024 AT €1,837M.**
Video game player's gaming time rise during 2025, now playing for nearly 8HR on average per week. Male players tend to engage more heavily than female players, dedicating more than 9HRS per week compared to over 5HRS for women. Gaming time peaks among teenagers aged 12 to 17 at 15HRS 31MIN but then declines abruptly to around 4-6HRS among adult players aged 18 to 75 yrs old.

4 **THE MOST POPULAR GAMING DEVICES ARE SMART DEVICES, REACHING MORE THAN 1 IN 5 (22%) 6-75 YRS OLD POP – 11.1M PLAYERS.**
8 in 10 (78%) Italian players game on smart devices with the consistently high device reach across ALL ages. Smart device players play for nearly 5HRS per week (stronger for men and younger 6-17s, and consistent for adults 18-75s). Estimated revenue from smart device now drives over half of total video game sales revenues, standing at €929M with freemium dictating YoY increased monetisation via in-app purchases.

5 **CONSOLE GAMING REACH OVER 1 IN 10 (13%) OF 6-75 YRS OLD POP – 6.5M CONSOLE PLAYERS.**
Consoles are the most engaging video game devices played by nearly half (46% of players) who also invest nearly 6HRS per week on average on console games. Estimated 2025 video game sales revenue stands at €643M, with nearly two thirds (64%) being digital, via FGD and additional in-game content DLC directly to their console devices. New packaged console games still contributing with 27% of 2025 revenue.

6 **LESS THAN 1 IN 10 (7%) OF 6-75 POP PLAY GAMES ON A COMPUTER/PC, REACHING 3.7M PC PLAYERS.**
PC gaming has become niche gaming devices, but with a strong hold within players dedicating 4HRS 27MIN per week to play PC games. Engagement is, again, stronger amongst males (stronger incidence and PC gaming time). Estimated PC revenue for 2025 is at €111M – fully digitalised with half of this revenue generated by additional in-game content DLC.

7 **SUSCRIPTIONS TO VIDEO GAME SERVICES DRIVE AN ESTIMATED REVENUE OF €153M FOR 2025 – UPDATED DEFINITION ACROSS DEVICES.**
Most of these revenues (59%) are driven by console ecosystem subscriptions, offering access to multiplayer services and/or access to video game libraries. 35% of these revenues are also driven by subs to single-game/franchise/publisher catalogues (e.g. WoW, Fortnite Crew / GTA+, EA Play/Ubisoft+). Mobile subs services also contribute with a small proportion of this revenue at 6% (Google Play/Apple Arcade).

CHAPTER 1:

REVENUE ESTIMATES

Overall, 2025 video game revenue from hardware (incl. accessories) and software (incl. second hand) is broadly stable YoY at €2.4bn

Estimated Full Year Revenue – Video Game Industry (Hardware/Accessories**/Software)

-1%

2024	2025*
€2,407m	€2,386m

- Video Game Sales estimate based on GameTrack. Methodology and questionnaire for 2025 have undergone revisions, generating limitations for like-for-like comparisons due to changes in questionnaire wording and methodology. Also, revenue estimates now integrate values from subscriptions to a more comprehensive set of video game services, such as console platform ecosystems, mobile/cloud-based services, and publisher or single-game/franchise services - previously unavailable.

* New subscription services have been included in the survey (platform base, single-game/publisher based and mobile-first) therefore, it is expected to have higher estimates for subscriptions for 2025.

** Hardware and Accessories (excl. Hybrid Toys) results based on Games Sales Data by Sparkers (on behalf of Video Games EU

***** Claimed revenues from other gaming devices / Internet TVs excluded.**

Q. On average, how much have you spent on buying, downloading or paying for extra content from for OFFICIAL games PER MONTH on each of the following devices? Q. How much have you been paying for these subscriptions PER MONTH across the last year? Base: All 11 to 75 yrs old who personally made official game purchases in the past 12 months or have a video game service subscription (n= 1,627)

Overall revenue from gaming reached €2.4bn in 2025, with game sales driving 77% of gaming consumer spend

Estimated Full Year Revenue – Video Game Industry by Component

€2,386m
2025 Overall Revenue

€1,836m
2025 Video Game Sales*
(-1% vs 2024)

€550m
2025 Hardware**
(+0.3% vs 2024)

€398m
2025 Consoles **
(+3% vs 2024)

€152m
2025 Accessories**
(-5% vs 2024)

- Video Game Sales estimate based on GameTrack. Methodology and questionnaire for 2025 have undergone revisions, generating limitations for like-for-like comparisons due to changes in questionnaire wording and methodology. Also, revenue estimates now integrate values from subscriptions to a more comprehensive set of video game services, such as console platform ecosystems, mobile/cloud-based services, and publisher or single-game/franchise services - previously unavailable.

* New subscription services have been included in the survey (platform base, single-game/publisher based and mobile-first) therefore, it is expected to have higher estimates for subscriptions for 2025.

** Hardware and Accessories (excl. Hybrid Toys) results based on Games Sales Data by Sparkers (on behalf of Video Games EU

***** Claimed revenues from other gaming devices / Internet TVs excluded.**

Q. On average, how much have you spent on buying, downloading or paying for extra content from for OFFICIAL games PER MONTH on each of the following devices? Q. How much have you been paying for these subscriptions PER MONTH across the last year? Base: All 11 to 75 yrs old who personally made official game purchases in the past 12 months or have a video game service subscription (n= 1,627)

The revenue from video game sales in Italy during 2025 is estimated at of €1.8bn – just marginally decreasing vs 2024

Estimated Video Game Sales Revenue

-1%

2024	2025*
€1,859m	**€1,836m**

- Video Game Sales estimate based on GameTrack. Methodology and questionnaire for 2025 have undergone revisions, generating limitations for like-for-like comparisons due to changes in questionnaire wording and methodology. Also, revenue estimates now integrate values from subscriptions to a more comprehensive set of video game services, such as console platform ecosystems, mobile/cloud-based services, and publisher or single-game/franchise services - previously unavailable.

* New subscription services have been included in the survey (platform base, single-game/publisher based and mobile-first) therefore, it is expected to have higher estimates for subscriptions for 2025.

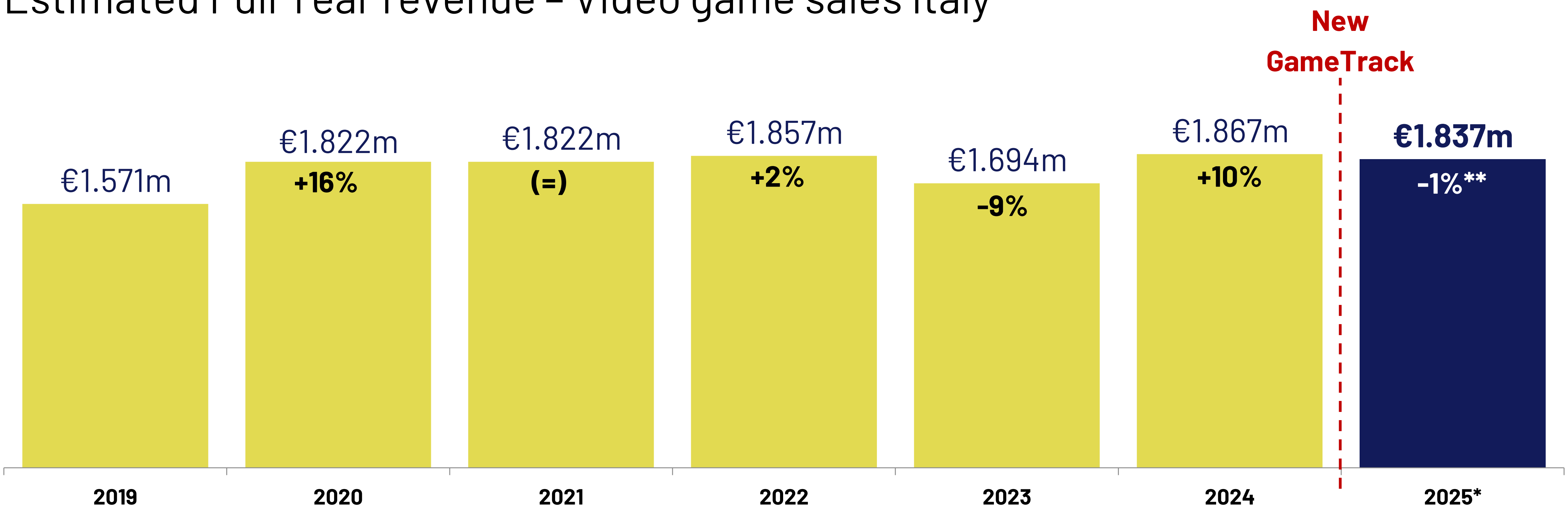
** Hardware and Accessories (excl. Hybrid Toys) results based on Games Sales Data by Sparkers (on behalf of Video Games EU

***** Claimed revenues from other gaming devices / Internet TVs excluded.**

Q. On average, how much have you spent on buying, downloading or paying for extra content from for OFFICIAL games PER MONTH on each of the following devices? Q. How much have you been paying for these subscriptions PER MONTH across the last year? Base: All 11 to 75 yrs old who personally made official game purchases in the past 12 months or have a video game service subscription (n=1,627)

Revenues from video game sales at overall level in Italy have stagnated since 2020, with yearly estimates at c€1.8bn per year

Estimated Full Year revenue – Video game sales Italy



- Video Game Sales estimate based on GameTrack. Methodology and questionnaire for 2025 have undergone revisions, generating limitations for like-for-like comparisons due to changes in questionnaire wording and methodology. Also, revenue estimates now integrate values from subscriptions to a more comprehensive set of video game services, such as console platform ecosystems, mobile/cloud-based services, and publisher or single-game/franchise services - previously unavailable.

* New subscription services have been included in the survey (platform base, single-game/publisher based and mobile-first) therefore, it is expected to have higher estimates for subscriptions for 2025.

** Hardware and Accessories (excl. Hybrid Toys) results based on Games Sales Data by Sparkers (on behalf of Video Games EU

***** Claimed revenues from other gaming devices / Internet TVs included.**

Q. On average, how much have you spent on buying, downloading or paying for extra content from for OFFICIAL games PER MONTH on each of the following devices? Q. How much have you been paying for these subscriptions PER MONTH across the last year? Base: All 11 to 75 yrs old who personally made official game purchases in the past 12 months or have a video game service subscription (n= 1,627)

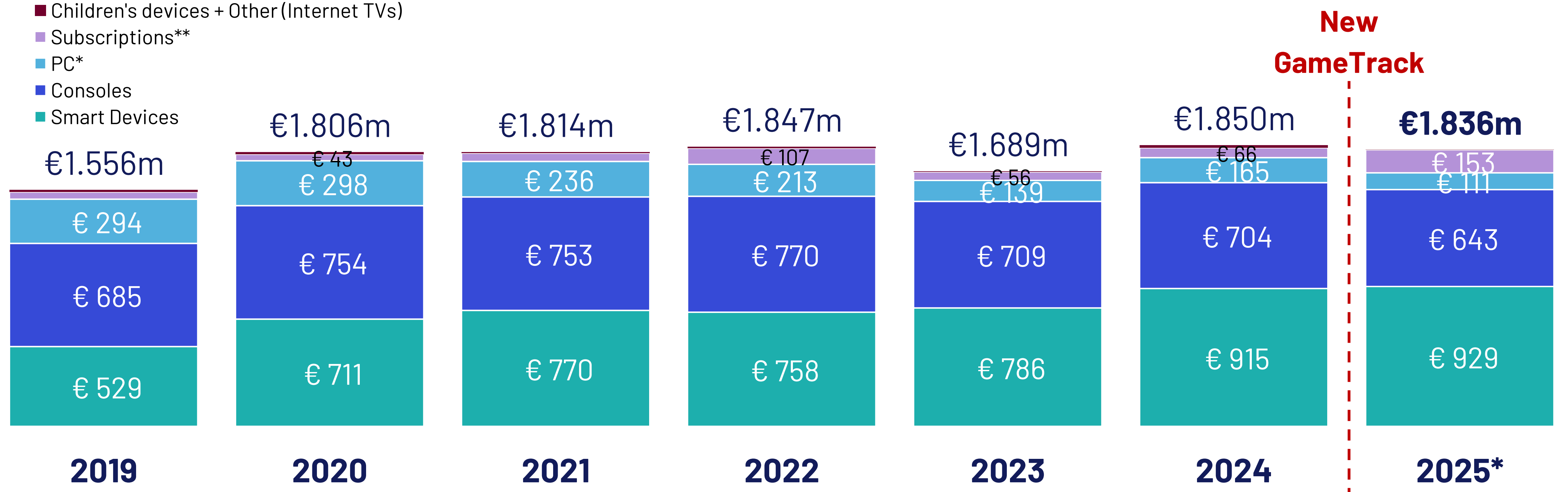
Video game devices and available distribution formats used for allocation of revenue estimates from video game sales

Video Game Device Ecosystems & Distribution Formats

Device	Format	Sub-format
Consoles / Portables	Packaged	New packaged
		Second hand packaged
	Online	Full Game Download (FGD)
		Additional content (DLC)
PC / Laptops	Packaged	New packaged
		Second hand packaged
	Online	Full Game Download (FGD)
		Additional content (DLC)
		Social network gaming
		Browser gaming
Smart Devices (Smartphones / Tablets)	Apps	Paid for
		Free (in-app content)
	Online	Social
		Browser
Other Devices (Children's devices / Internet TV (directly))	Online	Full Game Download (FGD)
		Additional content (DLC)
Subscriptions (available across multiple device types)	Online	Console driven eco-systems
		Single-Game / Franchise / MMO subs
	Apps	Mobile-Cloud First*

App gaming continue to rise in relevance within the Italian market, now accounting for over half (51%) of 2025 estimates

Estimated Full Year revenue by devices/services



- Video Game Sales estimate based on GameTrack. Methodology and questionnaire for 2025 have undergone revisions, generating limitations for like-for-like comparisons due to changes in questionnaire wording and methodology. Also, revenue estimates now integrate values from subscriptions to a more comprehensive set of video game services, such as console platform ecosystems, mobile/cloud-based services, and publisher or single-game/franchise services - previously unavailable.

* New subscription services have been included in the survey (platform base, single-game/publisher based and mobile-first) therefore, it is expected to have higher estimates for subscriptions for 2025.

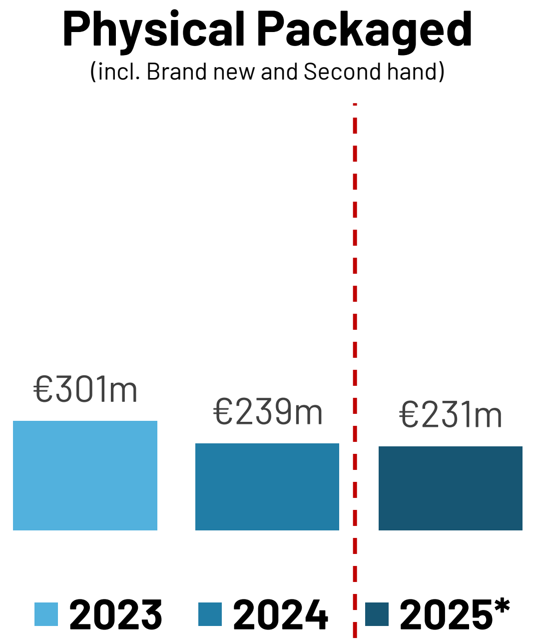
** Hardware and Accessories (excl. Hybrid Toys) results based on Games Sales Data by Sparkers (on behalf of Video Games EU

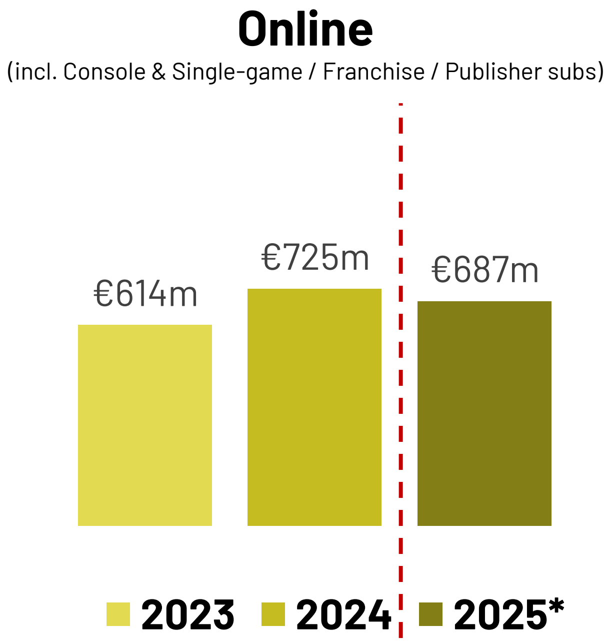
***** Claimed revenues from other gaming devices / Internet TVs included.**

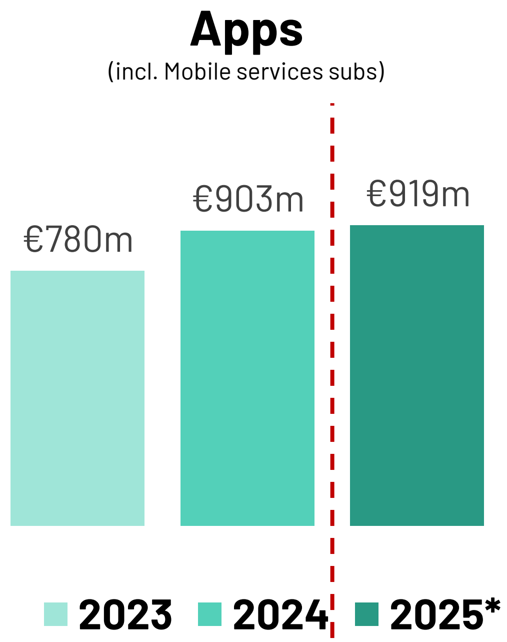
Q. On average, how much have you spent on buying, downloading or paying for extra content from for OFFICIAL games PER MONTH on each of the following devices? Q. How much have you been paying for these subscriptions PER MONTH across the last year? Base: All 11 to 75 yrs old who personally made official game purchases in the past 12 months or have a video game service subscription (n= 1,627)

Online formats fails to deliver as overall physical sales maintain value vs 2024. App gaming revenue marginally increases YoY

Estimated Full Year revenue by distribution format







- Video Game Sales estimate based on GameTrack. Methodology and questionnaire for 2025 have undergone revisions, generating limitations for like-for-like comparisons due to changes in questionnaire wording and methodology. Also, revenue estimates now integrate values from subscriptions to a more comprehensive set of video game services, such as console platform ecosystems, mobile/cloud-based services, and publisher or single-game/franchise services - previously unavailable.

* New subscription services have been included in the survey (platform base, single-game/publisher based and mobile-first) therefore, it is expected to have higher estimates for subscriptions for 2025.

** Hardware and Accessories (excl. Hybrid Toys) results based on Games Sales Data by Sparkers (on behalf of Video Games EU

***** Claimed revenues from other gaming devices / Internet TVs included.**

Q. On average, how much have you spent on buying, downloading or paying for extra content from for OFFICIAL games PER MONTH on each of the following devices? Q. How much have you been paying for these subscriptions PER MONTH across the last year? Base: All 11 to 75 yrs old who personally made official game purchases in the past 12 months or have a video game service subscription (n= 1,627)

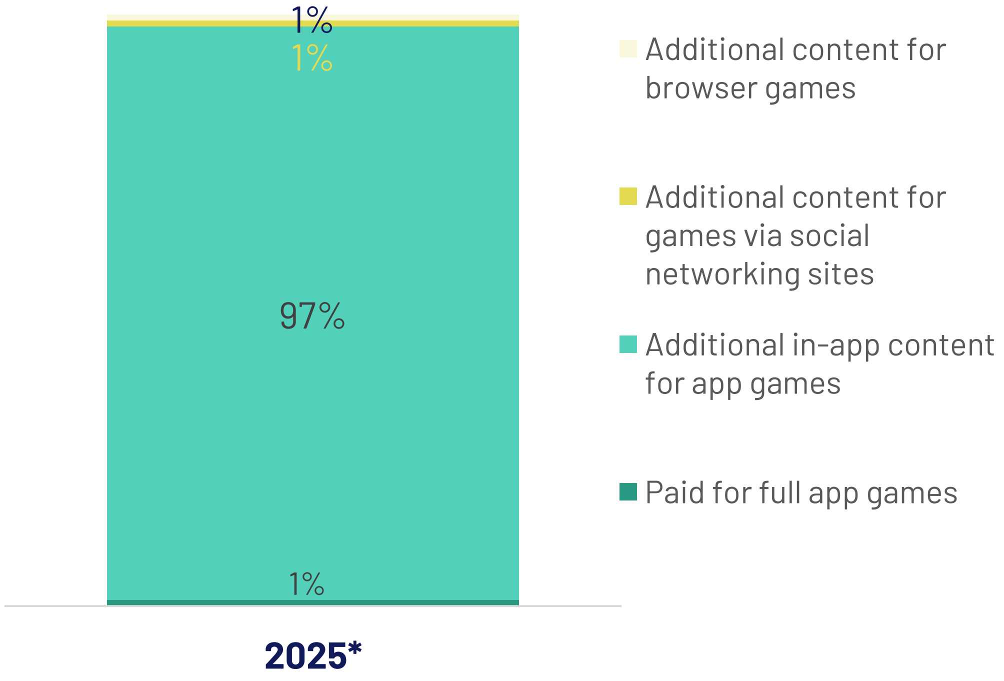
Freemium app monetisation governs app gaming – just 1% of app gaming revenue is generated by upfront paid app games

Estimated Full Year Smart device revenues by distribution format

2025

€929m

ARPU
€84



NET Online formats

€20m

(2% online game sales)

NET App formats

€909m

(98% of app game sales)

* GameTrack methodology and questionnaire for 2025 have undergone revisions, generating limitations for like-for-like comparisons due to changes in questionnaire wording and methodology. Also, revenue estimates now integrate values from subscriptions to a more comprehensive set of video game services, such as console platform ecosystems, mobile/cloud-based services, and publisher or single-game/franchise services - previously unavailable.

Q. On average, how much have you spent on buying, downloading or paying for extra content from for OFFICIAL games PER MONTH on each of the following devices? Q. How much have you been paying for these subscriptions PER MONTH across the last year? Base: All 11 to 75 yrs old who personally made official game purchases in the past 12 months or have a video game service subscription (n= 1,627)

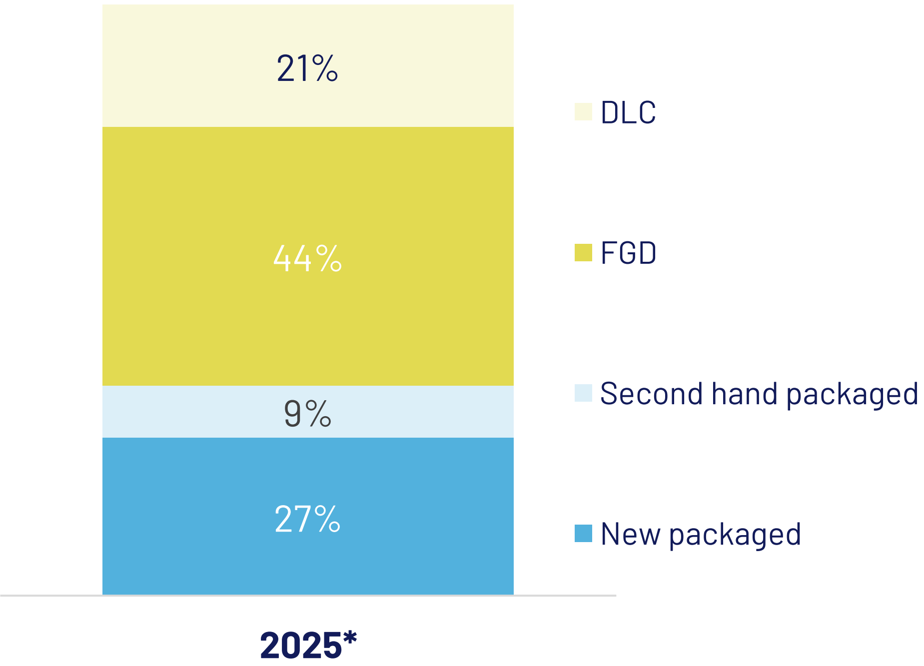
Almost two-thirds of console revenue from sales are now digital. New packaged still contributing with over a quarter in 2025 sales

Estimated Full Year console revenues by distribution format

2025

€643m

ARPU
€99



NET Online formats

€414m
(64% console video game sales)

NET Physical packaged

€229m
(36% of console video game sales)

* GameTrack methodology and questionnaire for 2025 have undergone revisions, generating limitations for like-for-like comparisons due to changes in questionnaire wording and methodology. Also, revenue estimates now integrate values from subscriptions to a more comprehensive set of video game services, such as console platform ecosystems, mobile/cloud-based services, and publisher or single-game/franchise services - previously unavailable.

Q. On average, how much have you spent on buying, downloading or paying for extra content from for OFFICIAL games PER MONTH on each of the following devices? Q. How much have you been paying for these subscriptions PER MONTH across the last year? Base: All 11 to 75 yrs old who personally made official game purchases in the past 12 months or have a video game service subscription (n= 1,627)

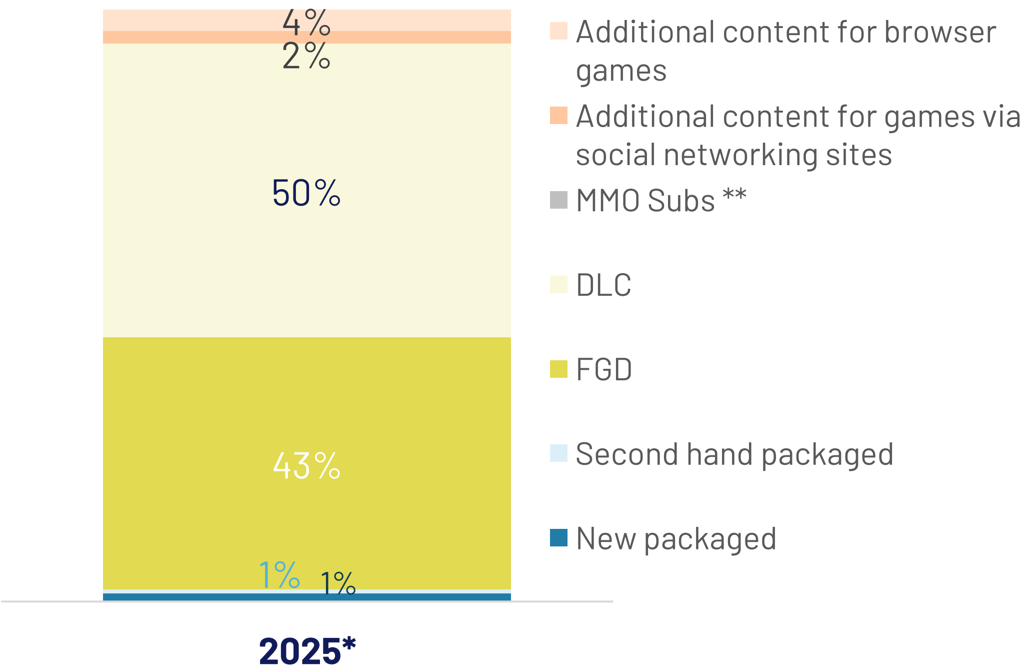
Additional content DLC drive half of PC revenues, with FGD representing 43% of 2025 PC revenue sales

Estimated Full Year PC gaming revenues by distribution format

2025

€111m

ARPU
€30



NET Online formats

€109m
(98% console video game sales)

NET Physical

€2m
(2% of PC video game sales)

- GameTrack methodology and questionnaire for 2025 have undergone revisions, generating limitations for like-for-like comparisons due to changes in questionnaire wording and methodology. Also, revenue estimates now integrate values from subscriptions to a more comprehensive set of video game services, such as console platform ecosystems, mobile/cloud-based services, and publisher or single-game/franchise services - previously unavailable.

** From 2025 revenues from PC MMO subs are assigned to Subscriptions from a single-game/franchise/publisher catalogues.

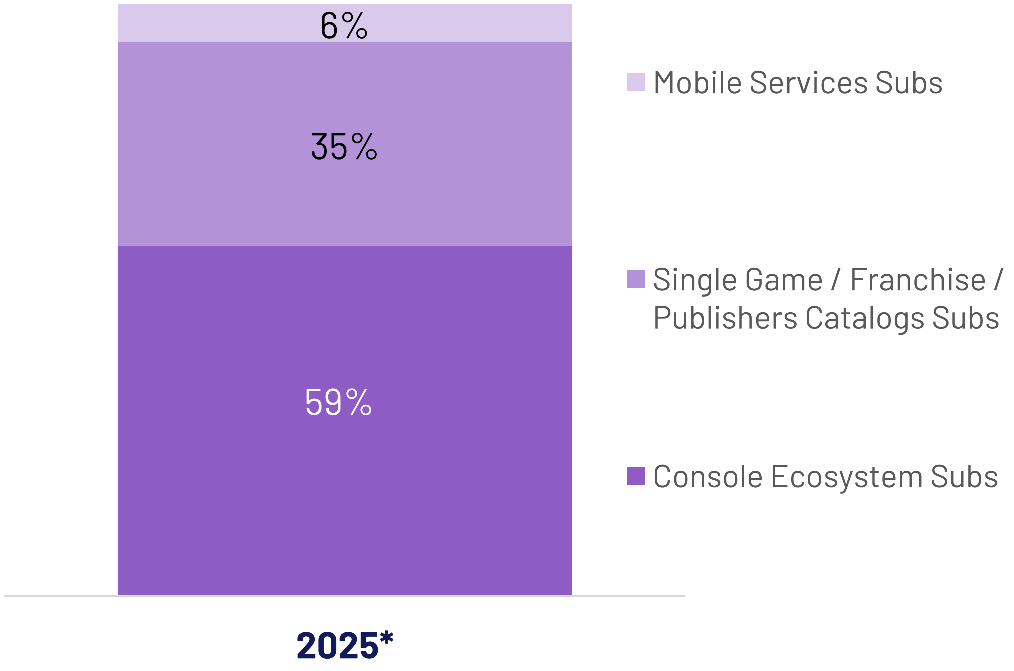
Q. On average, how much have you spent on buying, downloading or paying for extra content from for OFFICIAL games PER MONTH on each of the following devices? Q. How much have you been paying for these subscriptions PER MONTH across the last year? Base: All 11 to 75 yrs old who personally made official game purchases in the past 12 months or have a video game service subscription (n= 1,627)

Console subs services drive this distribution format and account for €6 of every €10 spent on gaming sub services during 2025

Estimated Full Year Gaming Subscriptions revenues by ecosystem

2025

€153m



- GameTrack methodology and questionnaire for 2025 have undergone revisions, generating limitations for like-for-like comparisons due to changes in questionnaire wording and methodology. Also, revenue estimates now integrate values from subscriptions to a more comprehensive set of video game services, such as console platform ecosystems, mobile/cloud-based services, and publisher or single-game/franchise services - previously unavailable.

** From 2025 revenues from PC MMO subs are assigned to Subscriptions from a single-game/franchise/publisher catalogues.

Q. On average, how much have you spent on buying, downloading or paying for extra content from for OFFICIAL games PER MONTH on each of the following devices? Q. How much have you been paying for these subscriptions PER MONTH across the last year? Base: All 11 to 75 yrs old who personally made official game purchases in the past 12 months or have a video game service subscription (n= 1,627)

2025 revenue from acquisition of console/PC video games overall is at €560m - €4 out of €10 is spent on physical games

Estimated full year revenue from sales of video games (Console and PCs - overall)

€560m
Purchase of Video Games (FGD + Physical Packaged)

€328m
Full Game Download (59%)

€231m
Physical Packaged Overall (41%)

€174m
Physical New Packaged (31%)

€58m
Physical Second Hand Packaged (10%)

* GameTrack methodology and questionnaire for 2025 have undergone revisions, generating limitations for like-for-like comparisons due to changes in questionnaire wording and methodology. Also, revenue estimates now integrate values from subscriptions to a more comprehensive set of video game services, such as console platform ecosystems, mobile/cloud-based services, and publisher or single-game/franchise services - previously unavailable.

** New subscription services have been included in the survey (platform base, single-game/publisher based and mobile-first) therefore, it is expected to have higher estimates for subscriptions for 2025.

Q. On average, how much have you spent on buying, downloading or paying for extra content from for OFFICIAL games PER MONTH on each of the following devices? Q. How much have you been paying for these subscriptions PER MONTH across the last year? Base: All 11 to 75 yrs old who personally made official game purchases in the past 12 months or have a video game service subscription (n= 1,627)

Looking at NEW console/PC video games nearly two-thirds (65%) of 2025 revenue generated is acquired digitally (FGD)

Estimated full year revenue from sales of video games (Console and PCs – Overall)

€502m
Purchase of New Video Games

€328m
Full Game Download (65%)

€174m
Physical New Packaged (35%)

* GameTrack methodology and questionnaire for 2025 have undergone revisions, generating limitations for like-for-like comparisons due to changes in questionnaire wording and methodology. Also, revenue estimates now integrate values from subscriptions to a more comprehensive set of video game services, such as console platform ecosystems, mobile/cloud-based services, and publisher or single-game/franchise services - previously unavailable.
** New subscription services have been included in the survey (platform base, single-game/publisher based and mobile-first) therefore, it is expected to have higher estimates for subscriptions for 2025.

Q. On average, how much have you spent on buying, downloading or paying for extra content from for OFFICIAL games PER MONTH on each of the following devices? Q. How much have you been paying for these subscriptions PER MONTH across the last year? Base: All 11 to 75 yrs old who personally made official game purchases in the past 12 months or have a video game service subscription (n= 1,627)

CHAPTER 2:

OVERALL REACH & GAMING TIME

29%

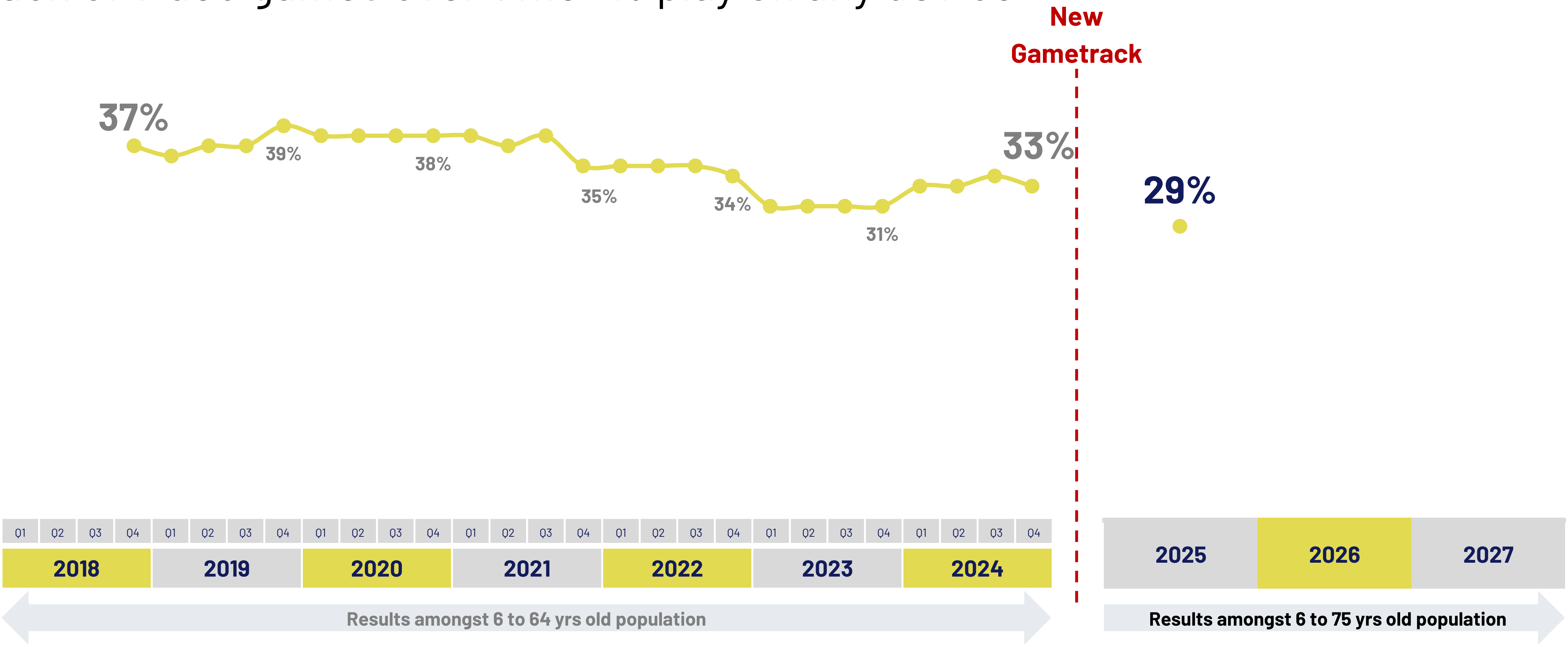
of 6-75 population play video games on any device. This equates to **c.14.2m** players

Q. Have you played any video games or app games on the following devices, if any, within the past 12 months, even if occasionally?

Base: All 6-75 respondents (n=c.2,000)

Around 3 in 10 aged 6-75 have played video games on any device in Italy in the past 12 months – 32% amongst 6-64s (unchanged)

Reach of video games over time- % play on any device



Q. Have you played any video games or app games on the following devices, if any, within the past 12 months, even if occasionally?
Base: All 6-75 respondents (n=c.3,385)

Italy's overall video game penetration is lower than the combined Europe5 markets (UK, FR, DE, ES, IT)

Reach of video games vs Europe5 - % play on any device

EU 5 Markets

48%

play on any device

Market Reach

29%

play on any device

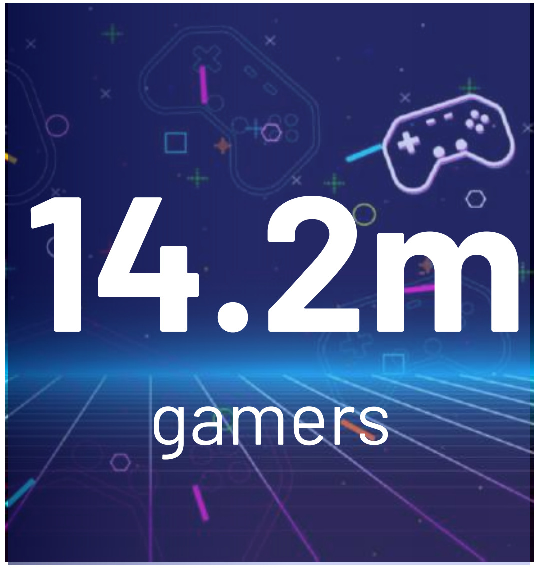
Q. Have you played any video games or app games on the following devices, if any, within the past 12 months, even if occasionally?

Base: All 6-75 respondents (n=c.3,385)

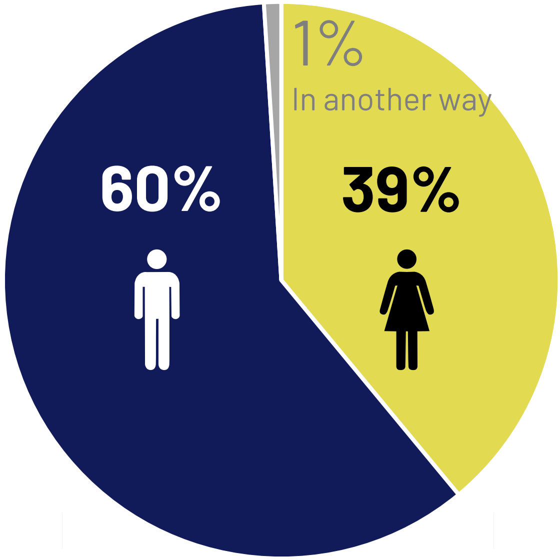
The 14.2m Italian video game players continue to skew male in terms of gender, with 57% of players aged 6 to 35 yrs old

Video games player numbers: Age and Gender profile

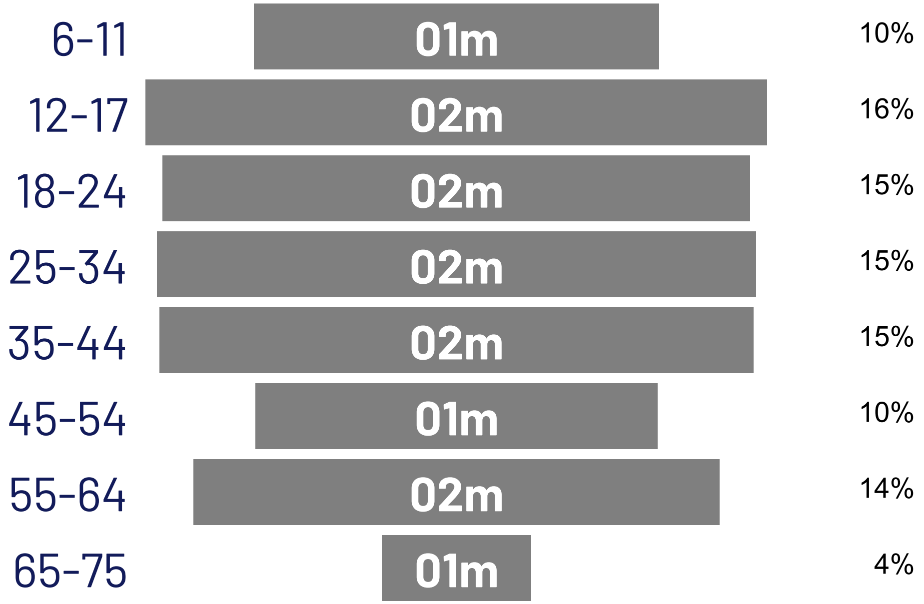
Volume



By gender



By age



26% of players are children/teens aged 6 to 17 yrs old

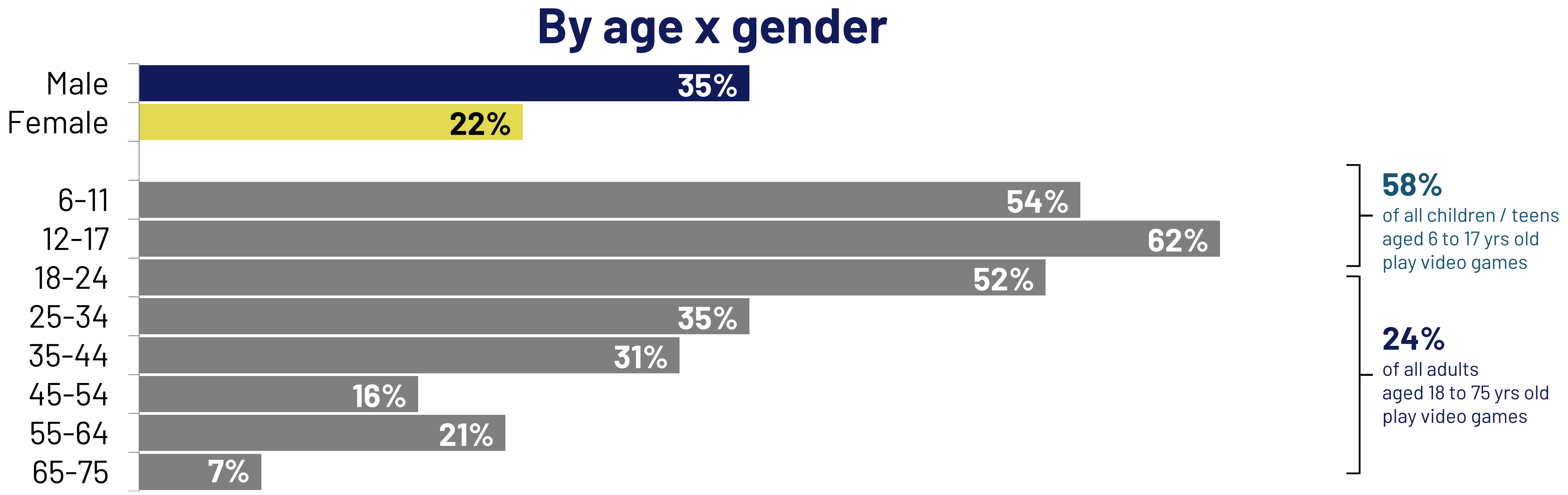
74% of players are adults aged 18 to 75 yrs old

Q. Have you played any video games or app games on the following devices, if any, within the past 12 months, even if occasionally?

Base: All 6-75 video game players (n=c.2,756)

Reach of video game playing peaks at 62% for 12-17s teenagers. This contrasts with less than 1 in 10 playing among older 65-75s

Reach of video game play by Age x Gender - % play on any device



Q. Have you played any video games or app games on the following devices, if any, within the past 12 months, even if occasionally?

Base: All 6-75 respondents (n=c.3,385)

Weekly gaming engagement remains strong, nearing 8 hours per player across devices

Average gaming time amongst gamers

7:53

per week

Q. Have you played any video games or app games on the following devices, if any, within the past 12 months, even if occasionally?
Base: All 6-75 respondents (n=c.2,756)

Average weekly gaming amongst 6-75s Italian players has increased, reaching nearly 8 hours per week - up from 2024

Gaming time (hours/week) Over Time– playing video games across devices

Q. Have you played any video games or app games on the following devices, if any, within the past 12 months, even if occasionally?

Base: All 6-75 respondents (n=c.2,756)

Italian video game players invest 7HRS 53MIN weekly, trailing the EU5 average gaming time by over an hour

Gaming time (hours/week) vs. EU5 Average – playing video games across devices

Weekly...

9:03 **hours are played in the EU5 on average**

7:53 **hours are played in Italy on average**

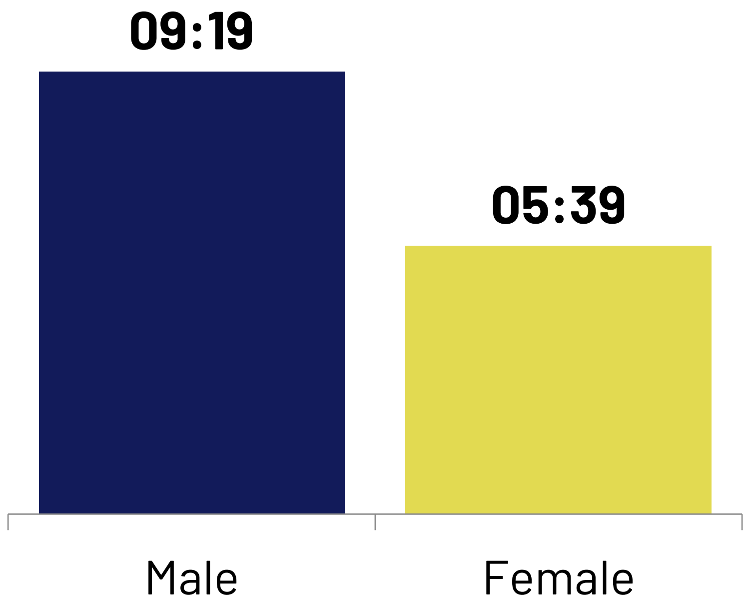
Q. Have you played any video games or app games on the following devices, if any, within the past 12 months, even if occasionally?

Base: All 6-75 respondents (n=c. 2,756)

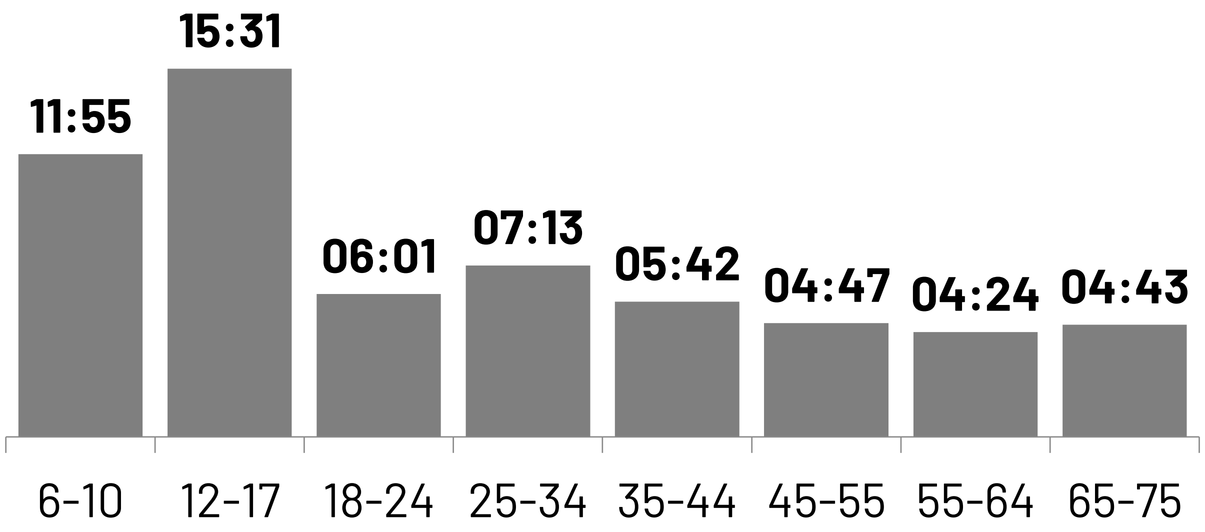
Male players exceeds females by over 2 hours weekly, with children & teenagers 6-17s leading in both, time and incidence

Weekly hours split by age and gender (hours : minutes)

Gender



Age



Q. Have you played any video games or app games on the following devices, if any, within the past 12 months, even if occasionally?

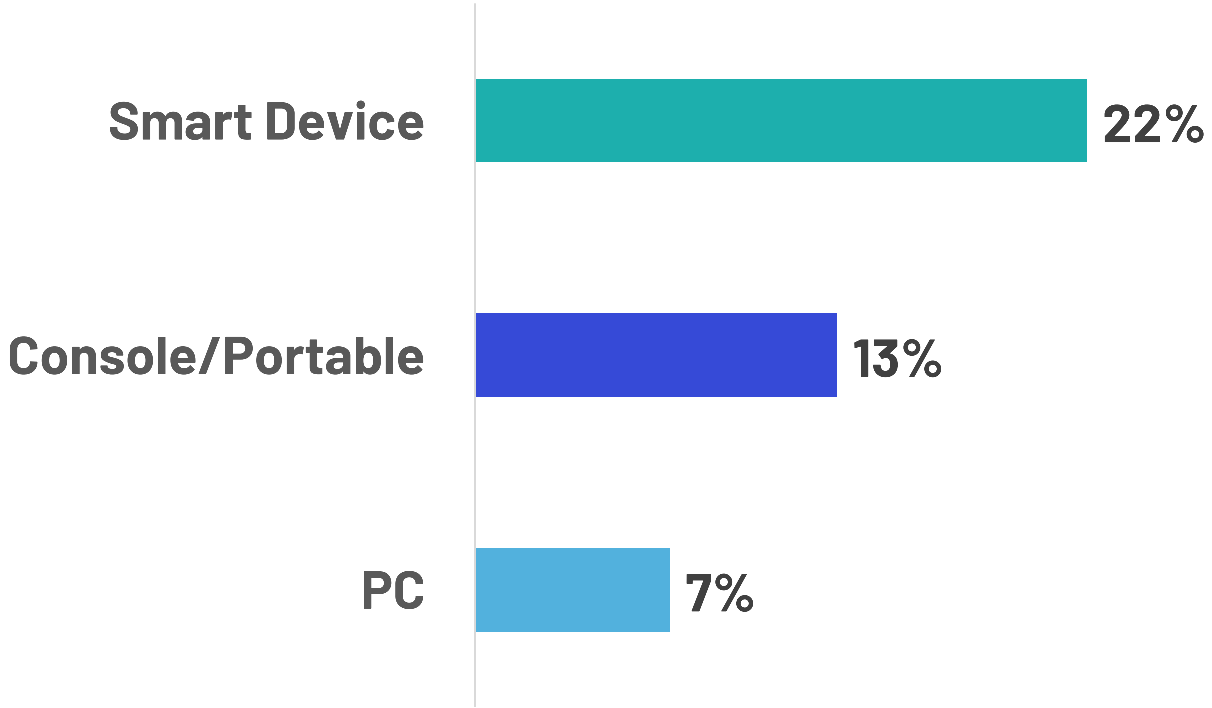
Base: All 6-75 respondents (n=c. 2,756)

CHAPTER 3:

DEVICE DEEP DIVE

Smart devices is the preferred gaming platform in Italy, with more than 1 in 10 playing consoles

Video game playing incidence by device (6-75 population)



Q. Have you played any video games or app games on the following devices, if any, within the past 12 months, even if occasionally? Base: All 6-75 respondents (n=c.3,385)

Smart device gaming in Italy also skews male and sees stronger player numbers amongst 12-17s teenagers

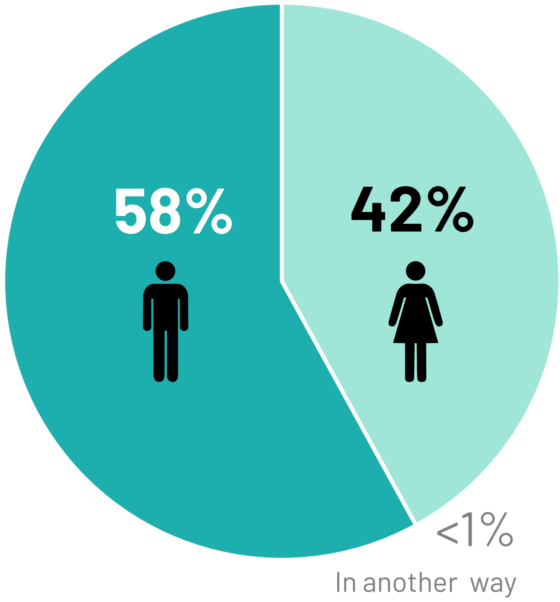
Smart device player numbers: Age and Gender profile

Volume

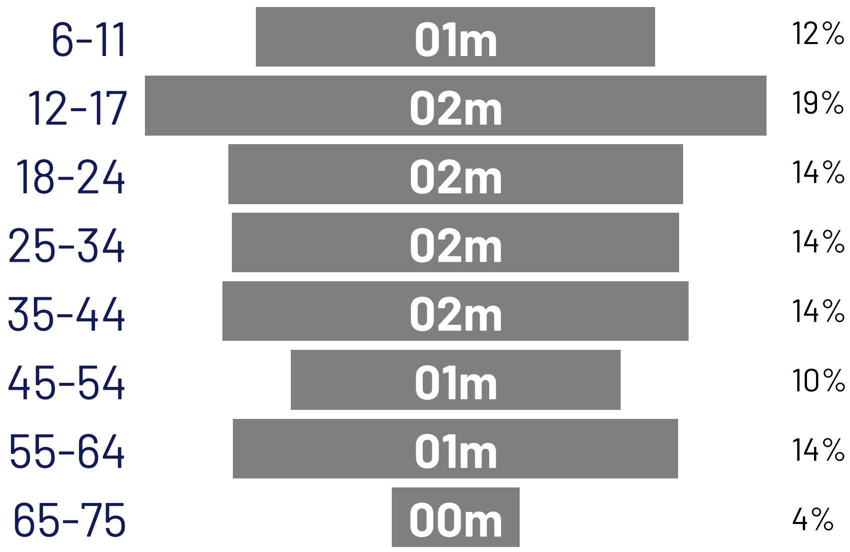
11.1m

Smart Device players

By gender



By age



31% of smart device players are children/teens aged 6 to 17 yrs old

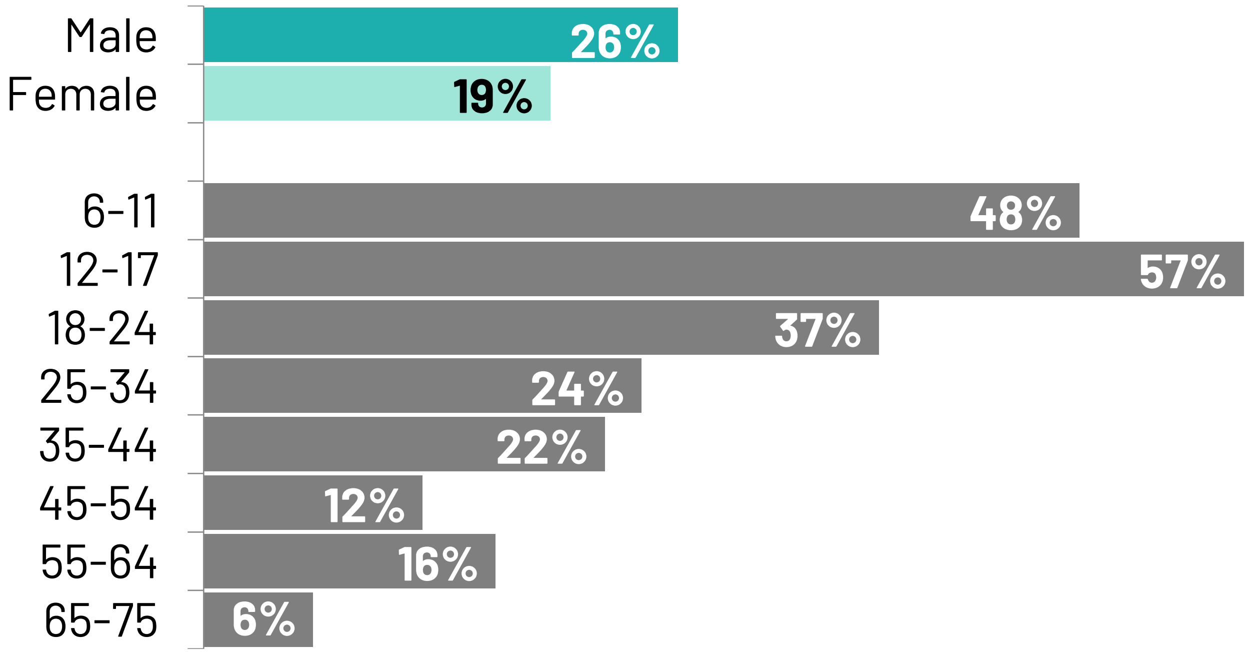
69% of smart device players are adults aged 18 to 75 yrs old

Q. Have you played any video games or app games on the following devices, if any, within the past 12 months, even if occasionally? Base: All 6-75 respondents (n=c.2,428)

Smart device gaming hits 57% amongst 12-17s before declining steadily by age. Just under 1 in 6 55-64s game on smart devices

Reach of video game play by Age - % play on Smart Devices

By age x gender



63%
of all children / teens aged 6 to 17 yrs old play games on smartphones / tablets

18%
of all adults aged 18 to 75 yrs old play games on smartphone / tablets

Q. Have you played any video games or app games on the following devices, if any, within the past 12 months, even if occasionally?

Base: All 6-75 respondents (n=c.3,385)

Casual titles lead genre play preferences, driven by Coin Master as the most prolific app game in Italy

SMART DEVICES

App Games

Source: SensorTower
Ranked on highest grossing

1	Coin Master	6	Last War
2	Royal Match!	7	Clash Royale
3	Candy Crush Saga	8	Gossip Harbor
4	Pokémon Trading Card Game Pocket	9	Gardenscapes
5	Monopoly Go!	10	Brawl Stars

SensorTower

Genres

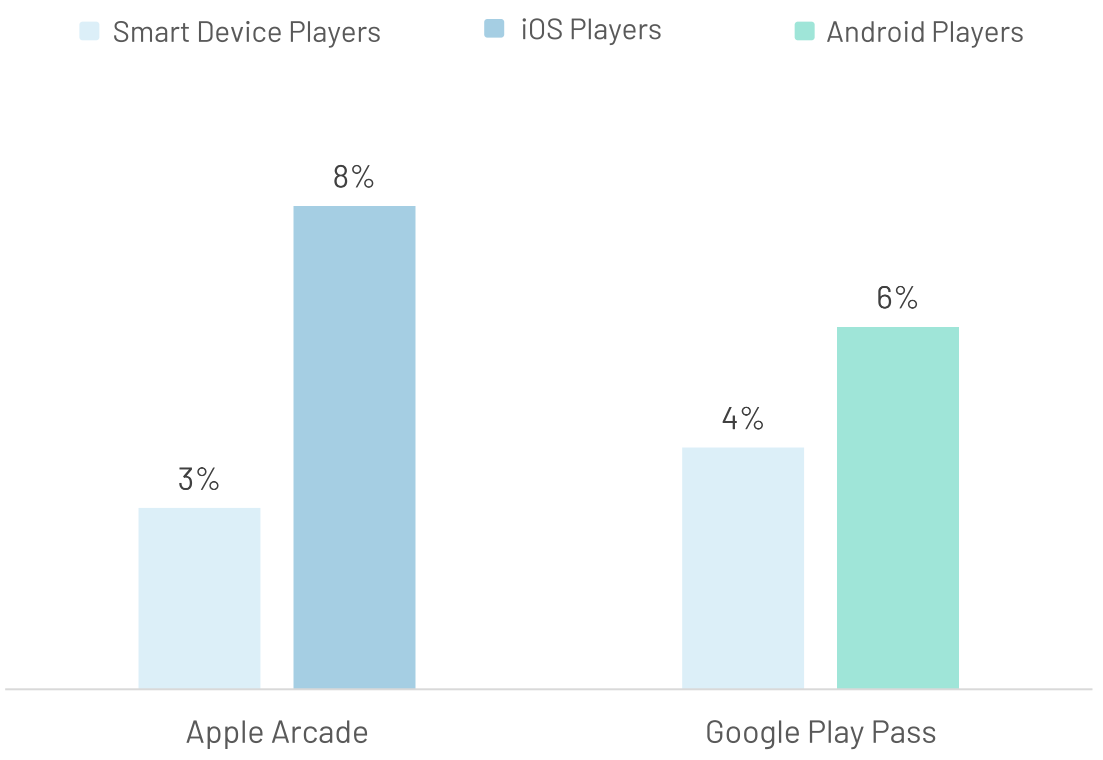
1	Casual Games (26%)	6	Adventure (14%)
2	Card (24%)	7	Word (13%)
3	Puzzle (17%)	8	Strategy (12%)
4	Trivia (16%)	9	Sport Games (10%)
5	Role Playing / Strategy (14%)	10	Action (9%)

You mentioned you played games on a PC. Which of the following types of games have you played in the past 12 months?
Base: All 11-75 Smart Device players (n=c.2,299)

Apple Arcade sees slightly higher adoption among iOS users than Google Play Pass does on Android

Apple Arcade is a subscription service that provides unlimited access to a curated collection of over 200 games, all without ads or in-app purchases. It's designed for a seamless experience across Apple devices like the iPhone, iPad, Mac, and Apple TV, allowing you to pick up where you left off on any of them. A single subscription can also be shared with up to six family members.

Google Play Pass is a subscription service for Android devices that offers access to a curated catalogue of over 1,000 apps and games. Similar to Apple Arcade, it removes ads and in-app purchases from the included titles. A key feature is that a subscription can be shared with up to five other family members.



Q. Which, if any, of the following services or subscriptions do YOU OR ANYONE ELSE in your household have an account for?
Base: All 11-75 Smart Device players (n=2,299)/ All 11-75 iOS players (n=873)/ All 11-75 Android players (n=1,783)

Console gaming is heavily male-skewed, with most being young 12–17s (30% of console players), followed by the 25-34s (18%)

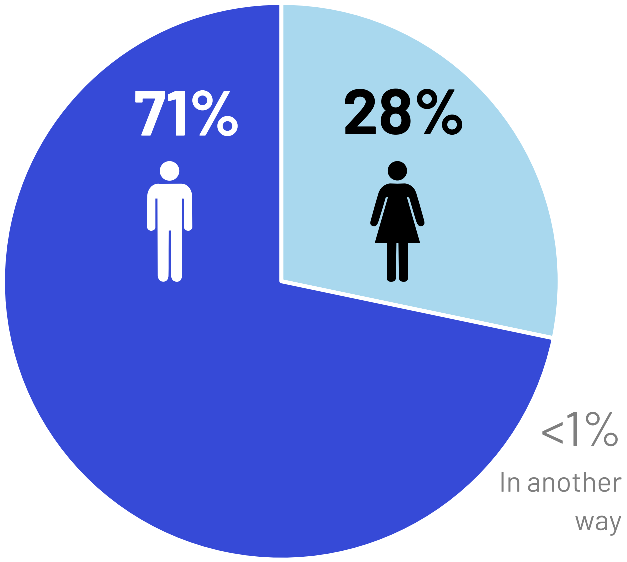
Console (incl. portable) player numbers: Age and Gender profile

Volume

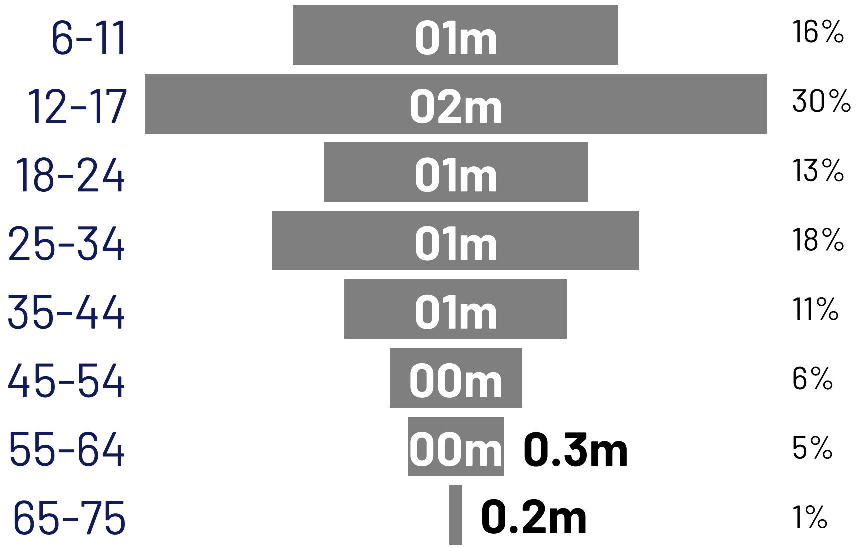
6.5m

Console players

By gender



By age



46% of console players are children/teens aged 6 to 17 yrs old

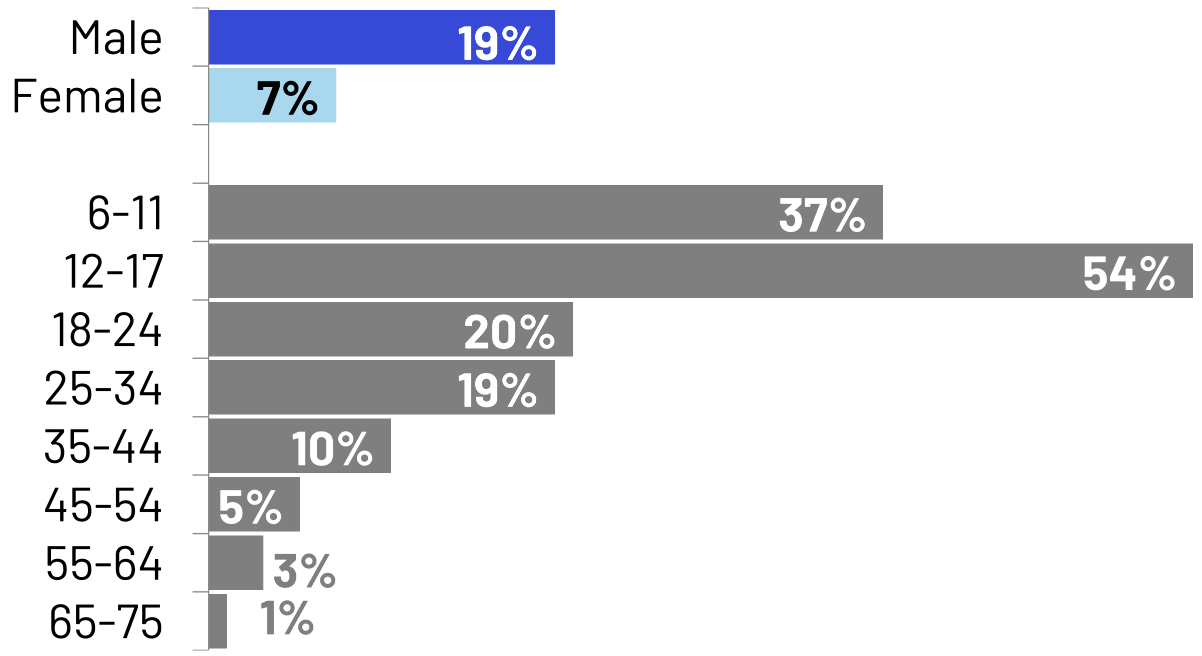
54% of console players are adults aged 18 to 75 yrs old

Q. Have you played any video games or app games on the following devices, if any, within the past 12 months, even if occasionally? Base: All 6-75 respondents (n=c.1,540)

Console reach 2 in 10 males but halves for females. More than half (54%) of 12-17s teenagers are console players

Reach of video game play by Age - % play on a Console

By age x gender



47%
of all children / teens aged 6 to 17 yrs old play games on consoles / portables

9%
of all adults aged 18 to 75 yrs old play games on console / portables

Q. Have you played any video games or app games on the following devices, if any, within the past 12 months, even if occasionally?
Base: All 6-75 respondents (n=c.3,385)

Sports games are the top played console game genre, with FC26 & FC25 top sold games during 2025 in Italy

CONSOLE

Games

Packaged + FGD
Source: GSD
Ranked on units sold

1 FC26
2 FC25
3 Grand Theft Auto V
4 Hogwarts Legacy
5 Red Dead Redemption II
6 Pokémon Legends Z-A
7 Assassin's Creed Shadows
8 Battlefield 6
9 Mafia The Old Country
10 Minecraft

**Sales figures includes digital sales from participating publishers (Nintendo digital sales are not included)*

Genres

1	Sport Games (37%)	6	Family Entertainment (20%)
2	Adventure (35%)	7	Strategy (17%)
3	Racing (33%)	8	Role-Playing (15%)
4	Action (33%)	9	Fighting (14%)
5	Shooter (25%)	10	Casual Games (12%)

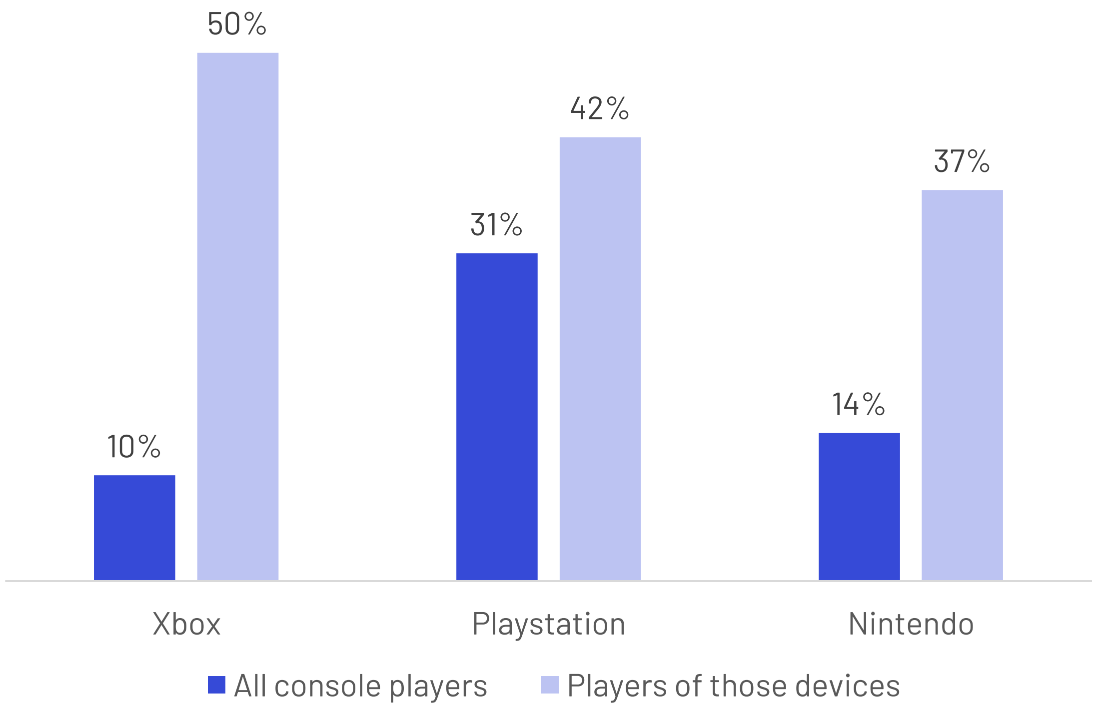
Q. You mentioned you played games on your console. Which of the following types of games have you played in the past 12 months?
Base: All 11-75 console / portable players (n=1,324)

Over a third of console gamers pay for game subs, with PlayStation seeing the highest attach rate

Xbox Game Pass Often called the "Netflix for games," this service offers a large, rotating library of hundreds of games, including new titles from Xbox's own studios on the day they are released.

PlayStation Plus This is a tiered service essential for most online multiplayer on PlayStation, which also offers a selection of monthly games and access to a large catalogue of current and classic games at higher tiers.

Nintendo Switch Online Required for online play in most Switch games, this service also provides cloud saves and access to a growing library of classic games from past Nintendo consoles like the NES, SNES, and Game Boy.



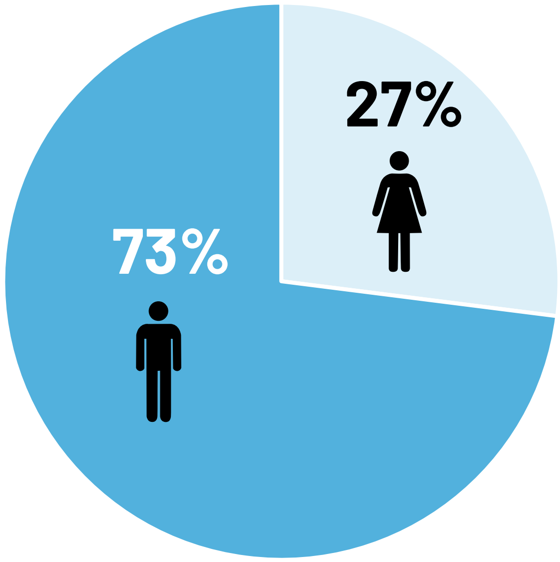
Q. You mentioned you played games on your console. Which of the following types of games have you played in the past 12 months?
Base: All 11-75 console / portable players (n=1,437)

PC gaming is the most male dominated making up nearly 3 in 4 PC players. Again, young 12-17s represent a third of PC players

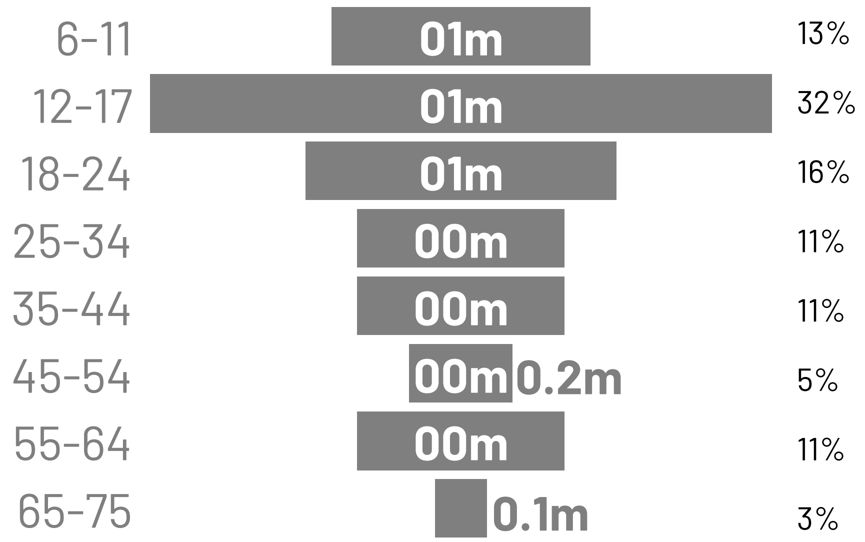
Computer/PC player numbers: Age and Gender profile

Volume

By gender



By age



46% of PC players are children/teens aged 6 to 17 yrs old

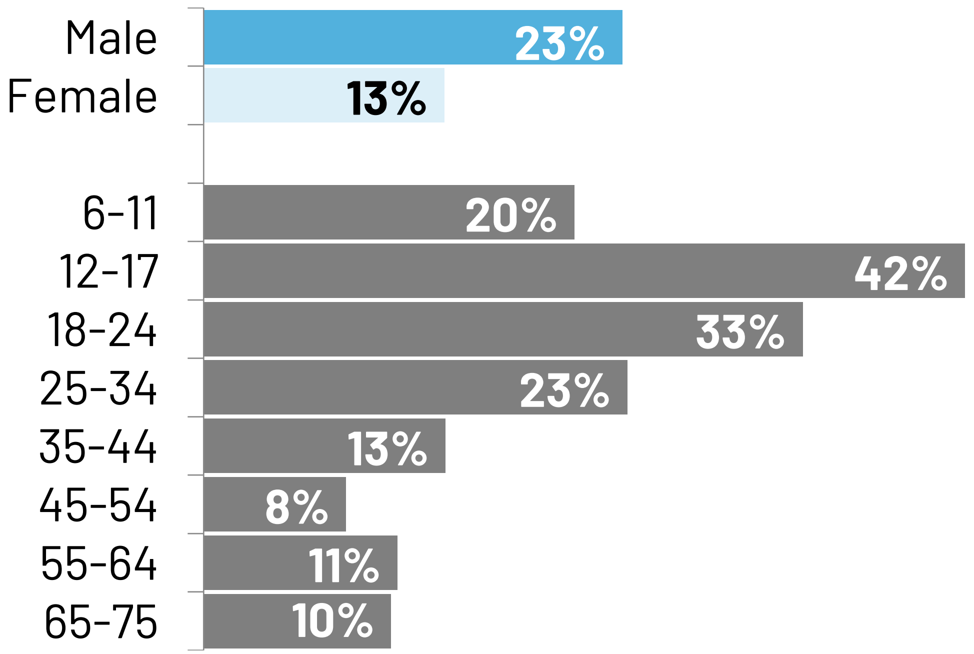
54% of PC players are adults aged 18 to 75 yrs old

Q. Have you played any video games or app games on the following devices, if any, within the past 12 months, even if occasionally? Base: All 6-75 PC players (n=1,324)

PC gaming incidence is twice as high for males, peaking at 12-17s at 42%, decreasing to around 1 in 10 for all over 35 years old

Reach of video game play by Age - % play on a PC

By age x gender



26%
of all children / teens aged 6 to 17 yrs old play PC games

5%
of all adults aged 18 to 75 yrs old play PC games

Q. Have you played any video games or app games on the following devices, if any, within the past 12 months, even if occasionally?

Base: All 6-75 respondents (n=c.3,385)

Adventure games are the top played PC genre – followed by shooters. Battlefield 6 & RDRII top 2025 PC game sales

PC

Games

Packaged + FGD
Source: GSD
Ranked on units sold

1	BATTLEFIELD 6	6	HOGWARTS LEGACY
2	RED DEAD REDEMPTION II	7	it takes two
3	grand theft auto V	8	BATTLEFIELD 1
4	EA SPORTS FC 26	9	TOM CLANCY'S RAINBOW SIX SIEGE
5	EA SPORTS FC 25	10	EA SPORTS F1 25

GSD Sparkers

**Sales figures includes digital sales from participating publishers (Nintendo digital sales are not included)*

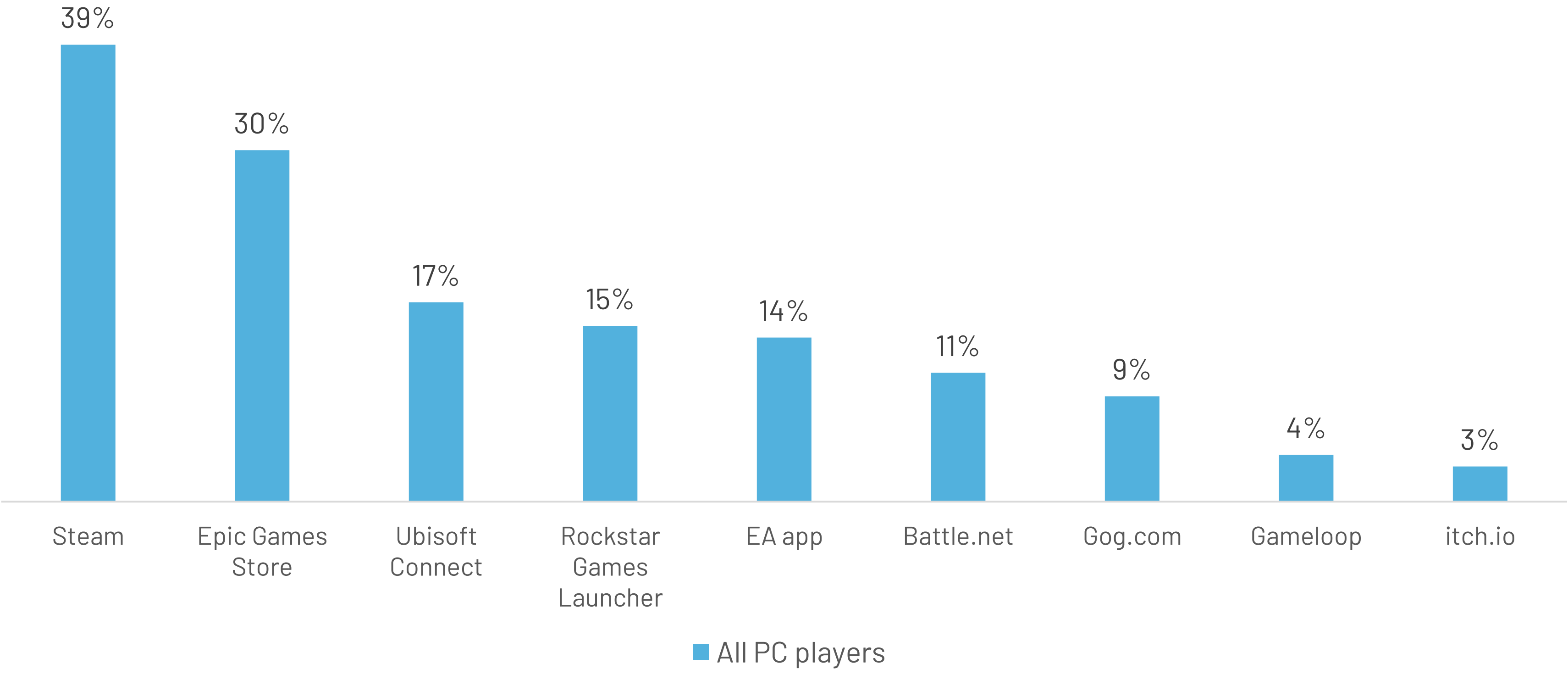
Genres

1	Adventure (35%)	6	Role-Playing (18%)
2	Shooter (27%)	7	Strategy (17%)
3	Sport Games (23%)	8	Casual Games (16%)
4	Action (20%)	9	Arcade (13%)
5	Racing (20%)	10	Flight (12%)

Q. You mentioned you played games on a PC. Which of the following types of games have you played in the past 12 months?
Base: All 11-75 PC players (n=1,271)

Steam comfortably leads as the preferred PC storefront in Italy. 1 in 3 PC players use Epic Games Store

PC game stores are digital marketplaces where users can purchase, download, and manage their computer games. The market features a variety of platforms, from the dominant, all-encompassing library of Steam to publisher-specific launchers like those from EA and Ubisoft. Other stores compete by offering exclusive titles, frequent free games, or specialising in niche areas like DRM-free classics and independent games.



Which of the following online video game stores do YOU use or have an account for ?
Base: All 6-75 respondents (n=c.1,271)

Across console/PC, strong franchises perform on 2025 (FC, GTAV, Hogwarts), with new releases ranking high (Pokémon, Assassin's, Mafia)

Top selling video games (across Console and PC)

TOP 10 best-selling video games*
(combined for Console / PC)

1	EA SPORTS FC26
2	EA SPORTS FC25
3	Grand Theft Auto Five
4	Hogwarts Legacy
5	Red Dead Redemption II
6	Battlefield 6
7	Pokémon Legends Z-A
8	Assassin's Creed Shadows
9	EA SPORTS F1 25
10	Mafia The Old Country

GSD sparkers

TOP 10 best-selling new releases*
(combined for Console / PC)

1	EA SPORTS FC26
2	Battlefield 6
3	Pokémon Legends Z-A
4	Assassin's Creed Shadows
5	EA SPORTS F1 25
6	Mafia The Old Country
7	Ghost of Yōtei
8	Call of Duty Black Ops 7
9	Split Fiction
10	Monster Hunter Wilds

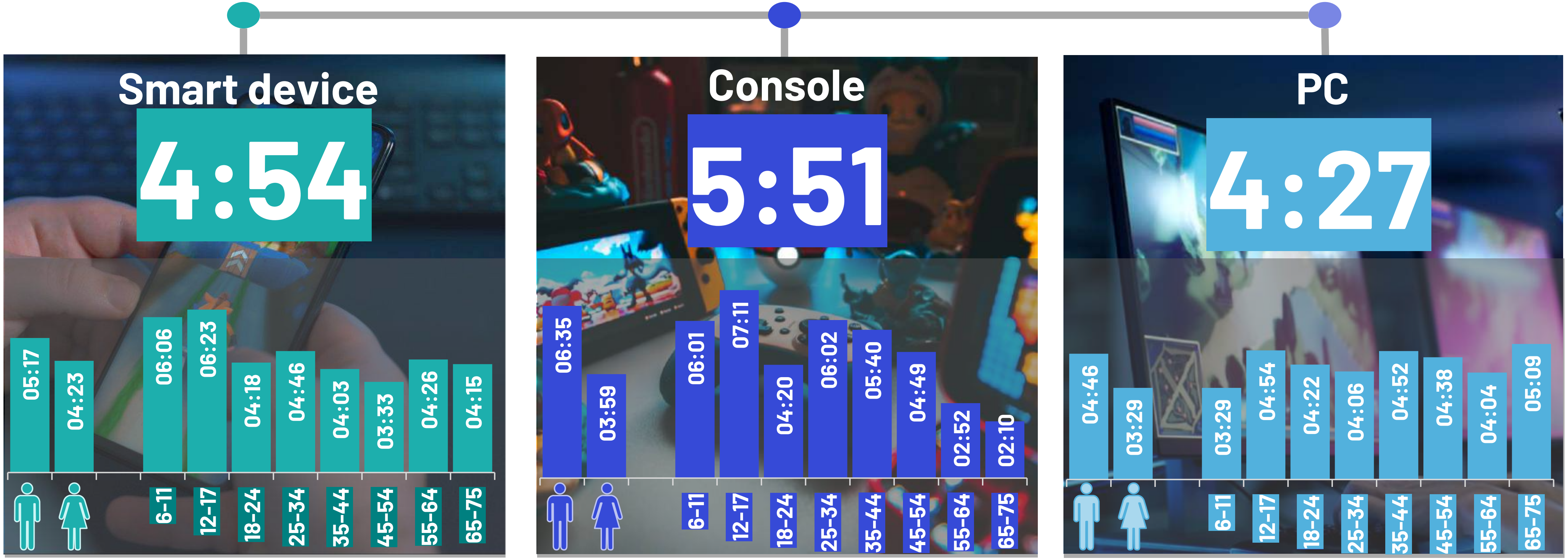
GSD sparkers

*Sales figures includes digital sales from participating publishers (Nintendo digital sales are not included)
Packaged + FGD. Source: GSD. Ranked on units sold

Consoles drive the highest playtime across devices, especially for males. PC gaming time is fairly consistent across ages

Gaming time by device – amongst 6-75 device gamers (2025)

Hours played per week



Q. Have you played any video games or app games on the following devices, if any, within the past 12 months, even if occasionally?
Base: All 6-75 specific device video game players (Smart Device n=2,428, Console / Portables n=1,540, PC n=1,324)

CHAPTER 4:

TOUCHPOINTS: SOCIAL & STREAMING PLATFORMS

Almost 1 in 4 players follow gaming news on YouTube/vlogs/video sites. 1 in 5 use social media, websites, and discuss with family/friends

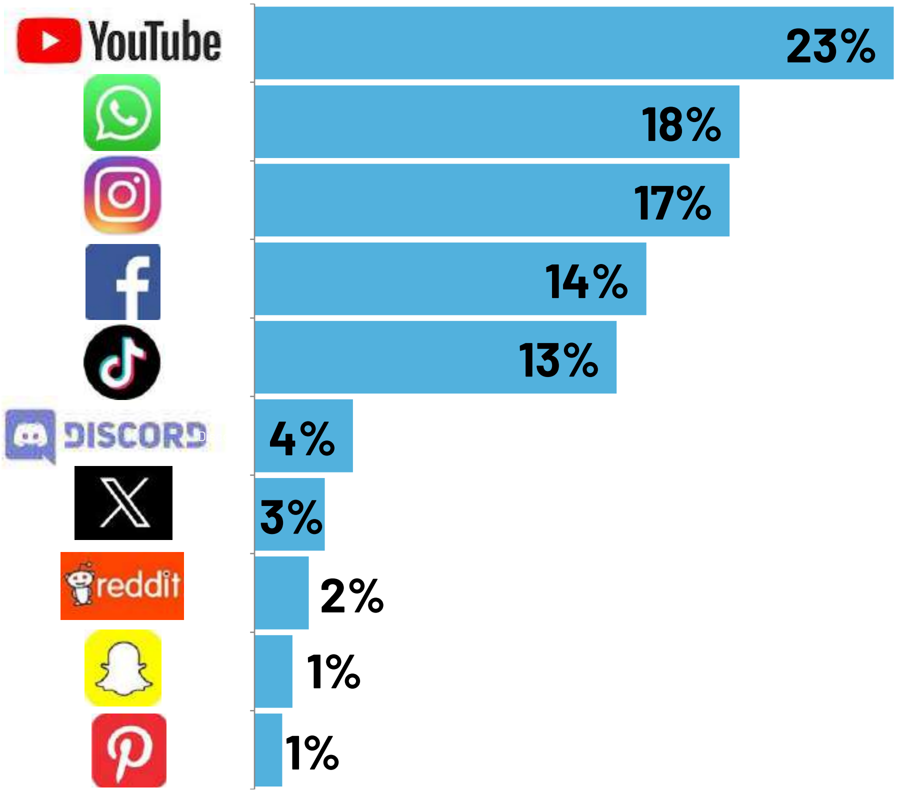
Where they typically follow video game news

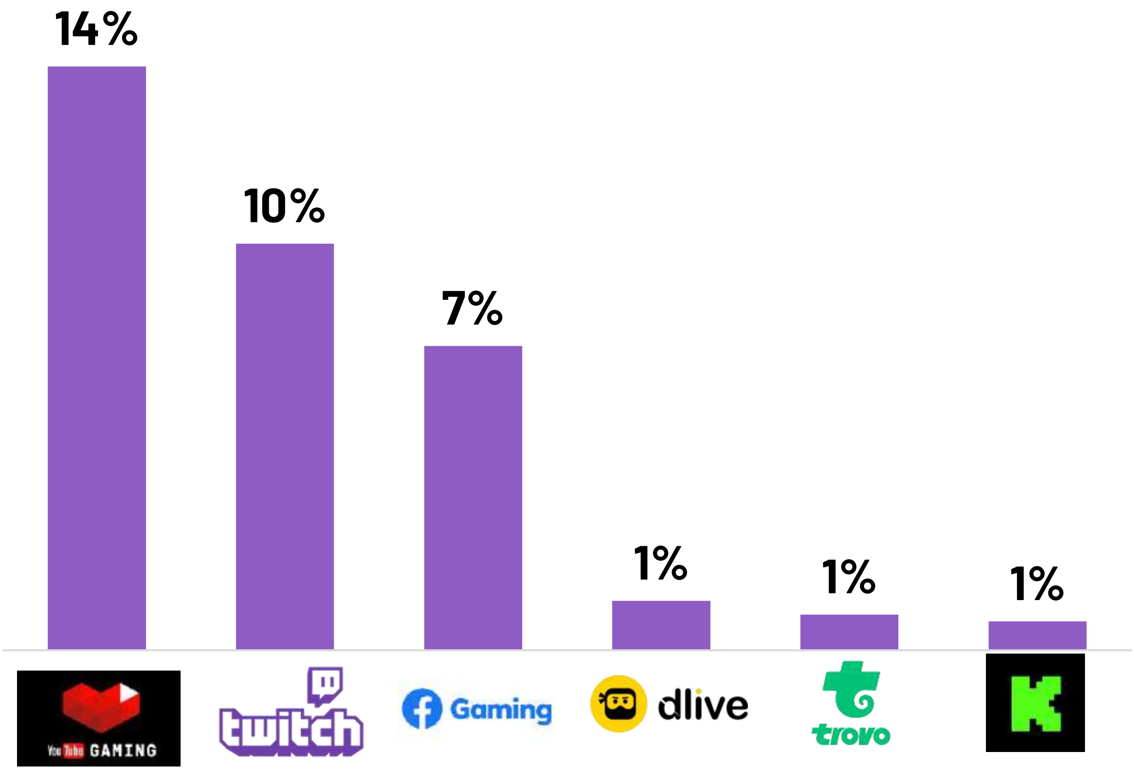
Friends/family	Social media	Influencers	YouTube/vlogs/ video channels	On websites
22%	23%	10%	24%	22%

Q. How do you typically follow news about video games and gaming, if at all? Select all that apply.
Base: All 11-75 players (n=2,611)

YT is the most popular site for discussing / finding out about gaming - Twitch also a well known & ranked streaming service

Social media channels used for video game news / streaming sites that are used





Q. How do you typically follow news about video games and gaming, if at all? Select all that apply.
Base: All 11-75 players (n=2,611)

TECHNICAL NOTES

FIELDWORK

GameTrack fieldwork runs once a year between Jan – Feb 2026, asking respondents about their past 12 months video game playing and purchasing habits. Also, sample of 1,000 adults aged 18+ is interviewed via a short offline survey (including questions relating to the games played by their 6-17 years old children/teens), to provide data that is used to weight responses from a much more detailed online survey. This offline survey is progressed once every three years, to keep track of overall reach and profile of the video game population.

The online survey is conducted amongst a sample of 3,000 internet users aged 6-75 years old since 2025 (previously 6-64 years olds), who represent the vast majority of all video games players for each country and runs once a year. Survey respondents are asked about their video game habits and claimed spend on video games on average per month. The results are extrapolated up for the year and reported as a yearly total when reporting value estimates. Time spent gaming is asked at a 'typical' level, not specific to a particular week.

WEIGHTING

Survey data is weighted to provide a nationally representative sample of a country specific 6-75 years old population from each country, with strong quotas in age, gender, region, education and working status, Whilst quotas are set to provide a 'good' representation of the population, the weighting provides a further refinement to ensure that it is completely representative. The specific GameTrack weighting is then designed to make the online sample of 6-75 years old representative of the ***full population*** of 6-75 years old – who play and don't play video games.

In terms of GameTrack, we have two key stages of weighting:

1. The offline omnibus data is weighted to provide a nationally representative sample of the population aged 18+.
2. The weighted omnibus data is used to provide the weighting scheme that we apply to the online sample. Key functions of this weighting are:
    - To weight the profile of PLAYERS and non-PLAYERS to be representative of the profile of each of these groups (as found within the offline omnibus sample).
    - To weight PLAYERS/non-PLAYERS to their correct incidences within the total population (as found within the offline omnibus sample).
    - The evolution for the video game audience is then tracked based on changes from the representative online sample using calibration factors vs offline results.

EXTERNAL DATA - CALIBRATION

For the key headline figures from GameTrack revenue estimates a calibration has been applied to align with accepted market values from sales data. In the case of app revenue from Smartphones/Tablets, this is calibrated using data from SensorTower, based on analysis of this data. Also, for new packaged, paid full game download estimates and additional in-game content acquisitions (DLC), overall estimates are calibrated using sales data from Games Sales Data (GSD) by Video Games EU. Calibration of research data to industry market sources in this manner is an accepted method and is used widely.

FOR MORE INFORMATION - CONTACT

Simon Little
Video Games EU - Managing Director

Eduardo Mena
Ipsos – Research Director

Paul Gray
Ipsos – Associate Director

Jack Maloney
Ipsos – Associate Director

FOR MORE INFORMATION

Simon.Little@videogameseurope.eu

Video Games Europe - Managing Director

Eduardo.Mena@ipsos.com
Ipsos - Research Director

GameTrack@ipsos.com

Ipsos Standards & Accreditations

Ipsos's standards & accreditations provide our clients with the peace of mind that they can always depend on us to deliver reliable, sustainable findings. Moreover, our focus on quality and continuous improvement means we have embedded a 'right first time' approach throughout our organisation.

ISO 20252 – is the international specific standard for market, opinion and social research, including insights and data analytics. Ipsos in the UK was the first company in the world to gain this accreditation.

MRS Company Partnership – By being an MRS Company Partner, Ipsos UK endorse and support the core MRS brand values of professionalism, research excellence and business effectiveness, and commit to comply with the MRS Code of Conduct throughout the organisation & we were the first company to sign our organisation up to the requirements & self-regulation of the MRS Code; more than 350 companies have followed our lead.

ISO 9001 – International general company standard with a focus on continual improvement through quality management systems. In 1994 we became one of the early adopters of the ISO 9001 business standard.

ISO 27001 – International standard for information security designed to ensure the selection of adequate and proportionate security controls. Ipsos UK was the first research company in the UK to be awarded this in August 2008.

The UK General Data Protection Regulation (UK GDPR) & the UK Data Protection Act 2018 (DPA) – Ipsos UK is required to comply with the UK General Data Protection Regulation and the UK Data Protection Act; it covers the processing of personal data and the protection of privacy.

HMG Cyber Essentials – A government backed and key deliverable of the UK's National Cyber Security Programme. Ipsos UK was assessment validated for certification in 2016. Cyber Essentials defines a set of controls which, when properly implemented, provide organisations with basic protection from the most prevalent forms of threat coming from the internet.

Fair Data – Ipsos UK is signed up as a 'Fair Data' Company by agreeing to adhere to twelve core principles. The principles support and complement other standards such as ISOs, and the requirements of Data Protection legislation.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252.