

WHITE
PAPER
ON THE
CATALAN
VIDEO
GAME
INDUSTRY
2021

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The Catalan video game industry continues to grow, as evidenced by the figures in this White Paper. The industry's turnover was €552 million in 2020, an increase of 17% compared to the previous year.

This increase in turnover has also led to a rise in the number of companies and professionals currently working on video game-related projects.

At present, there are around 200 studios working in Catalonia, which are divided as follows:

There are 123 incorporated companies, in addition to around 35 that are at risk of closing their doors, as they have not been active in the last few months.

There are 77 projects undergoing active development by professionals which have not yet been incorporated as companies, but which should be considered part of the industry.

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The total number of companies and professionals provide employment for 3,966 people, an increase of 17% compared to last year. The sector in Catalonia has welcomed the offices of major international studios including King, Ubisoft, Smilegate and Scopely in recent years, and this trend has continued in the past few months, as evidenced by the opening of offices by IO Interactive. The entry of foreign studios into local companies, as in the case of My. Games and The Breach Studios, the acquisition of other consolidated studios (e.g. Digital Legends by Activision Blizzard) highlights the good health and standing of the Catalan video game industry in other countries.

This increase in the number of workers has been accompanied by a significant rise in the number of women employed in the Catalan video game industry, which has risen from 20% to 25% in just one year.

With 52% of sales, Europe remains the leading market for Catalan video games.

This sector mostly involves formats for PC (82%), but next generation consoles such as PlayStation 5 and Xbox Series X/S are beginning to have a considerable impact (59%).

Seventy-four per cent of the studios still engage in self-financing to carry out interactive entertainment projects, but a change in financing needs has become apparent: the largest tranche is now between 150,000 and 300,000 euros for the next project.

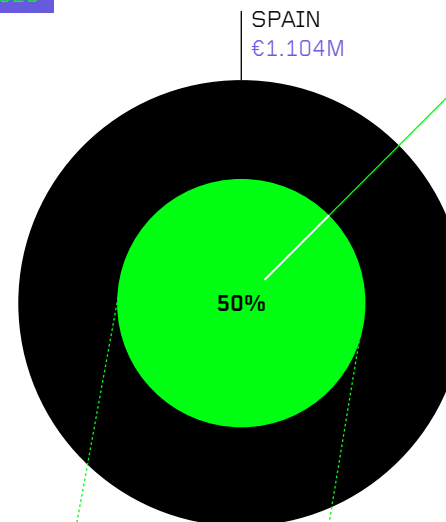
The growth in the main markers in this White Paper shows the sector's strength in Catalonia at a difficult time given the public health crisis of recent years. Because of the digital nature of its labour and distribution, the video game industry has been able to adapt to the new situation quickly, and this has enabled it to grow in recent months.

THE CATALAN VIDEO GAME INDUSTRY IN FIGURES

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TURNOVER

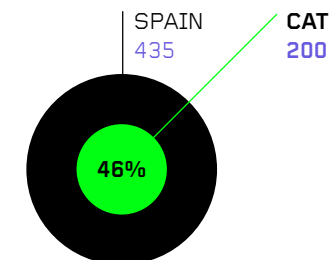
2020



CATALAN STUDIOS
€552M
(+17% compared to 2019)

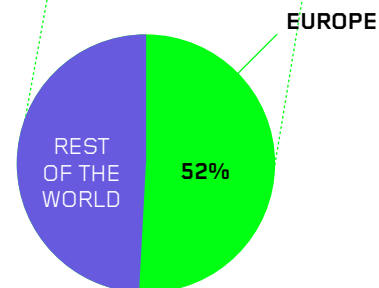
COMPANIES & STUDIOS

2020



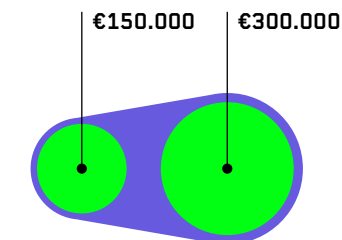
MAIN MARKET

2020



NEXT PROJECT

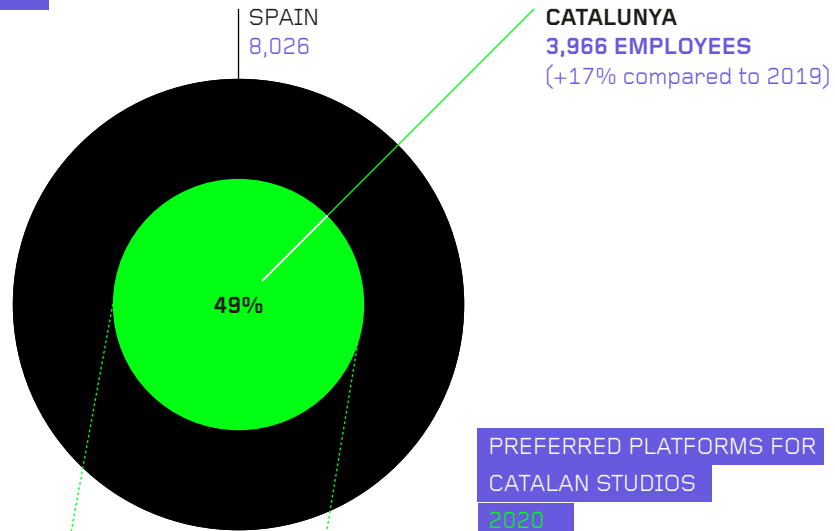
WILL COST BETWEEN



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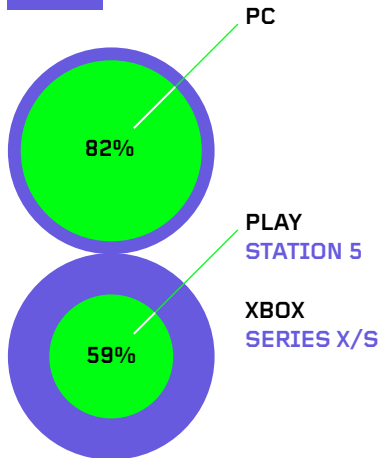
THE SECTOR EMPLOYS

2020



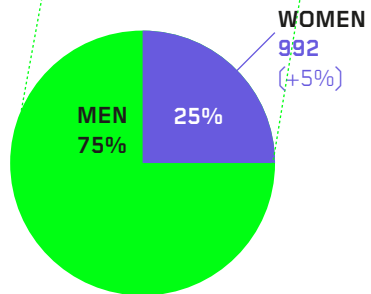
PREFERRED PLATFORMS FOR CATALAN STUDIOS

2020



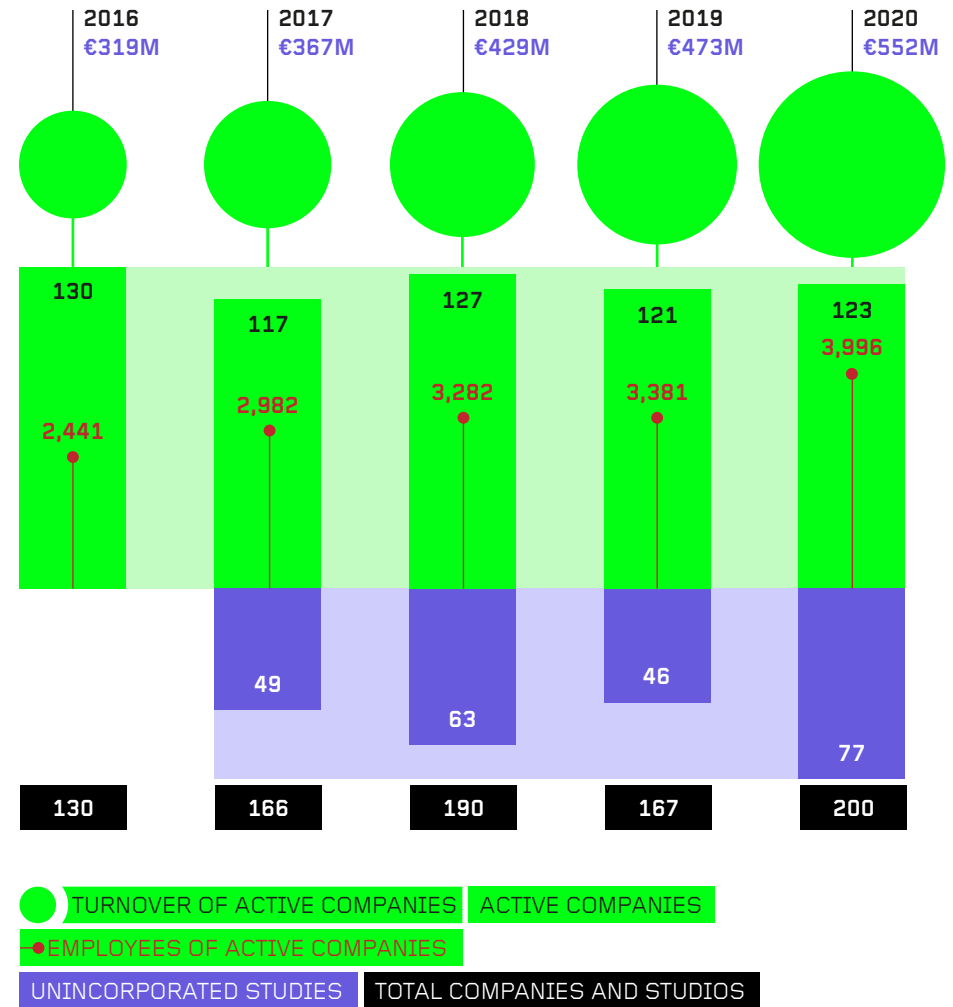
GENDER DISTRIBUTION

2020



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Summary of the Catalan video game industry
2016-2020



METHODOLOGICAL NOTE: The criteria for counting the total number of companies and studios was revised beginning in 2019: it includes active companies and studios that have not yet been incorporated, but which are active. The figures from previous years have been reviewed to provide comparative data.

GAME
OVER
CONTINUE?