

September 2022. Sector snapshot

The video game sector

in Catalonia

The video game sector in Catalonia

ACCIÓ

Government of Catalonia (Generalitat de Catalunya)



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Execution

ACCIÓ Strategic and Competitive Intelligence Unit

Barcelona, September 2022

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The video game sector

Definition of the video game sector.

The **video game sector** consists of **physically sold video games** and **digital video games**. Physically sold video games include revenues associated with in-person purchases from retail shops or on-line shops in the form of **CD, DVD or other solid storage media**. Digital video games include revenues associated with sales of video games on **digital platforms**, which include **additional downloadable content (DLC)** and **subscription services**.

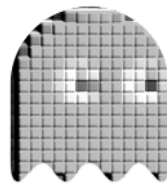
Video game production process

PRE-PRODUCTION



- Art: script, sound and graphics.
- Mechanical function.
- Initial programming.

PRODUCTION



- Code programming.
- Team: programmers, designers, musicians, initial tests.

POST-PRODUCTION



- Bug detection and initial assessment:
- Alpha test: detection of significant bugs.
 - Beta test: assessment prior to sale.

Source: ACCIÓ based on Statista

The video game sector worldwide (I)

- In 2021, the video game sector recorded a turnover of around **\$175,800 M.**
- These revenues are particularly geographically distributed among **Asia-Pacific (50%), North America (24%) and Europe (18%).**
- **Growth** over the coming years will be concentrated in **Asia-Pacific**, the **Middle East** and **Africa**, which will lead to a growth in **mobile games.**
- The **turnover of the video game sector focuses on three areas:** mobile phone + tablet (**45%+ 7%**), TV/console (**28%**) and computer (**19%**).
- **Growth** of the **video game sector** was affected by the **pandemic**, but **mobile games** continued to grow and recorded a year-on-year growth of **4.4%** in 2020-2021, accounting for **over half** the global video game market.



Source: Global Games Market Report, Newzoo, 2021

The video game sector worldwide (II)

Top global markets 2020

Country	Revenues (millions of dollars)	Number of players (millions)
China	46,010	685.48
United States	40,540	191.12
Japan	22,090	75.62
South Korea	7,550	33.01
Germany	5,870	46.12
United Kingdom	5,310	37.66
France	4,130	38.08
Canada	3,690	20.98
Italy	3,290	36.55
Spain	2,330	29.73

The top 25 video game companies worldwide (by revenues)



40% of the world's leading video game companies have a presence in Catalonia.

Source: Newzoo, 2021

The video game sector in Catalonia

Video games in Catalonia: a sector destined to grow

The Catalan ecosystem: competitive and innovative for video games

- Catalonia is the **driving force of the Spanish video game ecosystem** and represents **50% of its turnover**.
- Barcelona is the **best tech city** in Europe that is not a capital city (*Tech Cities Index, Savills, 2019*).
- Barcelona is the **2nd city in Europe**, after London, with the **best tech ecosystem approach** (*Financial Times, 2020*).



On the global radar for investment into video games

- Catalonia is the region of the European Union with the highest number of projects carried out and investments received, and the 2nd in job creation.
- **Famous companies such as Larian Studios, King or Scopely** set up shop in Catalonia in 2021.



Hub of local and international talent in an environment of great creativity

- Barcelona is the **10th most attractive city in the world for digital experts** (*Decoding Digital Talent 2021. The Network. Boston Consulting Group*).
- Barcelona is the **9th favourite city in the world for work by foreigners** (*Decoding global talent, BCG, 2021*).
- Barcelona is perceived as the **8th best city in the world in arts and entertainment** (*Resonance Consultancy, 2021*).
- Barcelona is the **9th most cultural and creative city in Europe** (*Cultural and Creative Cities Monitor, European Commission, 2019*).



Source: ACCIÓ

The video game sector in Catalonia: figures



206

Active video game studios (2021)

- 27.4% of all video game studios in Spain.



€552.5 M

(2020)

- 16.8% growth in relation to 2019.
- **Catalonia** is the **driving force of the Spanish video game ecosystem** and represents **50%** of its **turnover**.



3,933

Direct employees (2020)

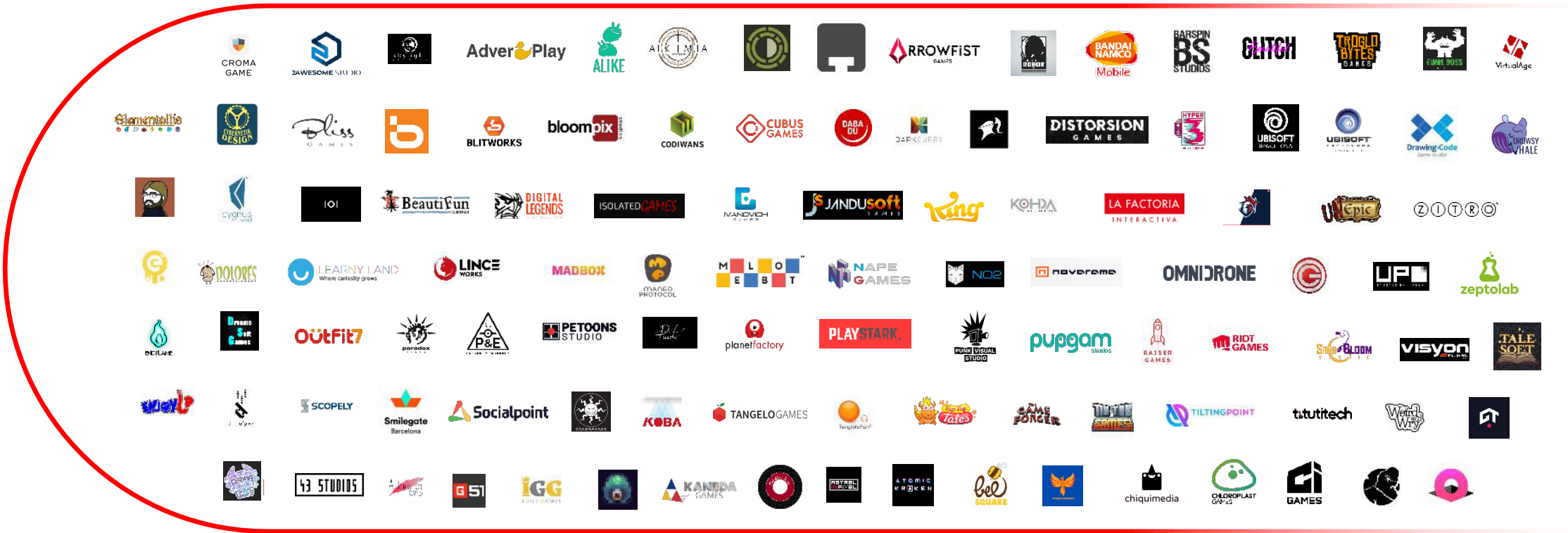
- 16.3% growth in relation to 2019.
- 49% of total employment in the sector in Spain.



Source: ACCIÓ based on the White paper on the development of video games in Spain, 2021

Main Video games companies in Catalonia (I)

Companies, video game developers and studios in Catalonia



Source: ACCIÓ based on Orbis

Main video games companies in Catalonia (II)

There are **56 startups** related to the video game sector in Catalonia, an increase of 44% compared to 2018.

	2018	Var% 18/19	2019	Var% 19/20	2020	Var% 20/21	2021	Var% 21/22	2022
Startups	39	15 %	45	9 %	49	0 %	49	14 %	56

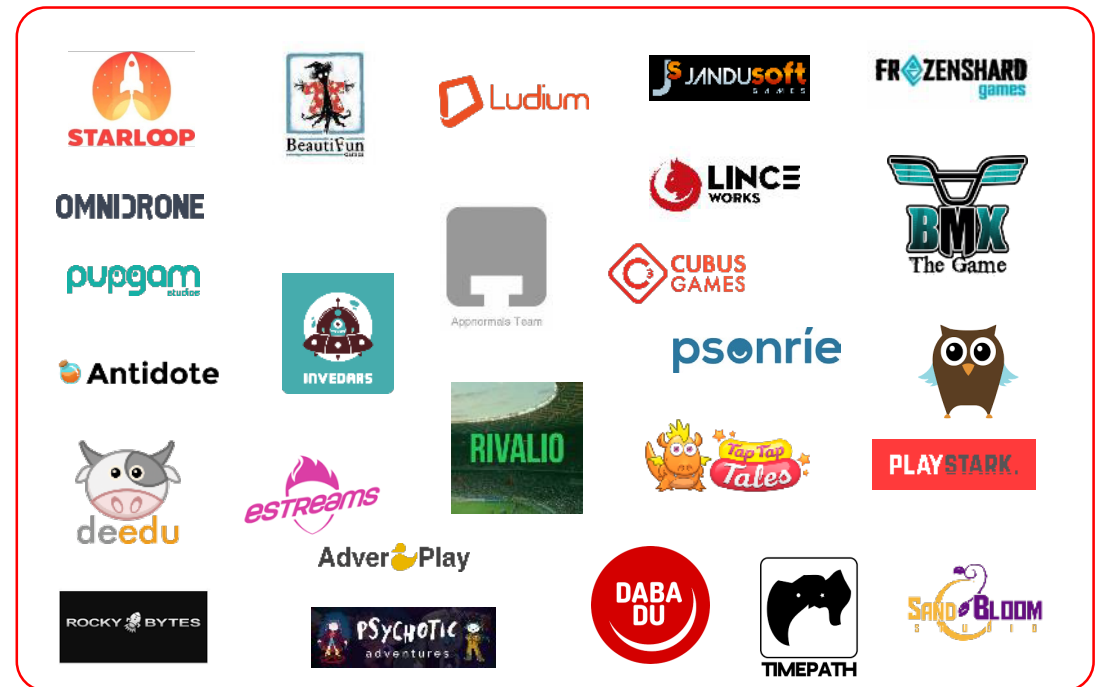


Game Troopers develops and publishes video games on the Microsoft Store and Steam. It has published over 20 games on these two platforms. Its game **OverkillVR** received an award from Valve in 2017.



Red Helmet Experience develops **interactive video games** played in group in its own circuits, where it offers an **immersive experience**. It currently has three circuits at its two physical stores.

Barcelona, **1st**
hub of **startups** in Southern Europe
(EU-Startups, 2020)



Source: ACCIÓ based on the Barcelona & Catalonia Startup Hub, 2021

Catalonia, an internationally recognised tech hub

Barcelona is the 2nd city in Europe, after London, with the **best tech ecosystem approach**

(Financial Times, 2020)

1st tech city in Europe that is not a capital city

(Tech Cities, Savills Index, 2019)

Barcelona is the **2nd most technological city in Southern Europe**

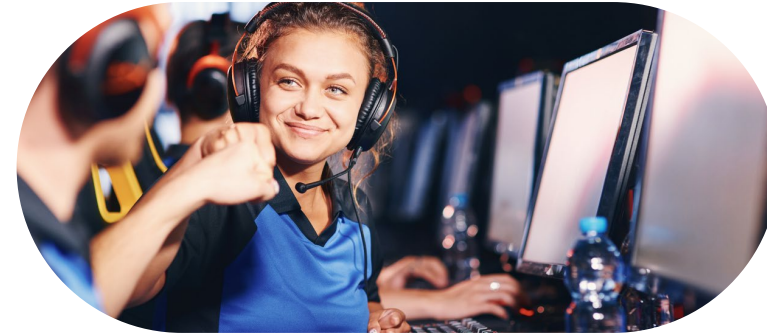
(Tech cities of the future, fDi intelligence, 2021)

25 of the 50 most innovative companies in the world are present in **Catalonia**

(BCG, 2021)

Barcelona is the **7th city in Europe** in terms of **capital invested in tech companies**

(The State of European Tech, Atomico, 2021)



Source: ACCIÓ

An innovative ecosystem at the service of the video game sector

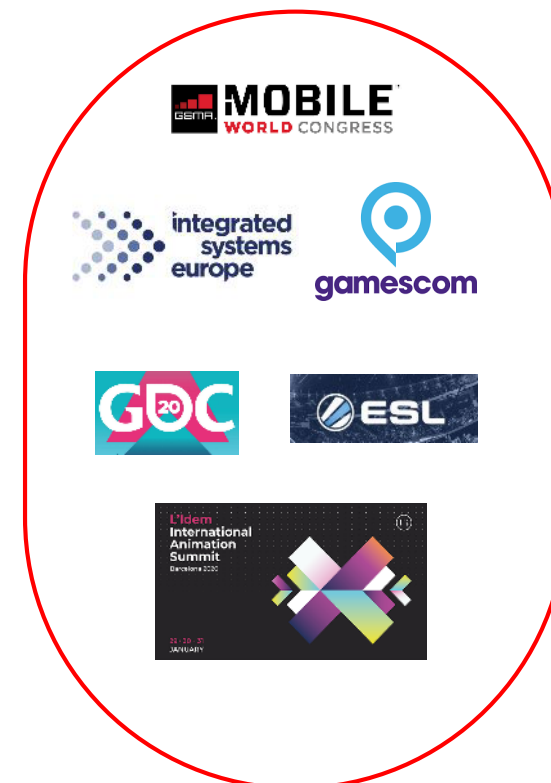
Universities specialising in video games



Clusters/associations/institutions related to video games



International trade fairs and congresses related to video games



Source: ACCIÓ

Projects headed by Catalan tech centres related to video games



Innovative tech solutions for the design, implementation and validation of **serious games** and **gamification**. Vocational training, detection, rehabilitation, and education. One example is **Virtual Perfusionist**, a serious game of surgical operations developed by the Polytechnic University of Catalonia and the Hospital Clínic of Barcelona.



The **Sim4Nexus** project is a **video game** (a *serious game*) in the form of an on-line **simulator** that enables users to understand the results of **environmental management** policies from a cross-cutting approach and on different levels.



GameTools develops **games** to test internal **representation systems** of companies to provide testers that show the **viability** of the methods developed.



MED GAIMS is an experimental **tourism** project that seeks to promote and improve experiences through **gamification**.



Researchers from the IBEC have developed a **virtual reality**-based system for rehabilitating patients with Broca's aphasia. **RGSa** has been proven to **improve** communicative frequency and effectiveness in **daily life**.



Digital games for the **elderly** are a new type of **game** able to reinforce and tap into the strengths of the elderly as individuals and players, **reducing loneliness**, encouraging socialisation, and improving physical and psychosocial **well-being** in the elderly.



EduGame4City: the project consists of the design and gamified implementation for 3D visualisation with **virtual and augmented reality** of real cases in the city of Barcelona, such as the "superblocks". It also studies the improvement of motivational, spatial, social and user skills.

The project is to form part of the project coordinate with UPC GAME4CITY and its main goal is to **improve** the **architectural education** and skills of students.

Source: ACCIÓ

Excellent location for foreign investment (I)

Data on FDI projects 2017-2021

20

FDI projects

▲ 400 % (2012-2016)

118

Investment (€M)

▲ 97 % (2012-2016)

891

Jobs created

▲ 100 % (2012-2016)

64,5 %

of FDI projects in Spain

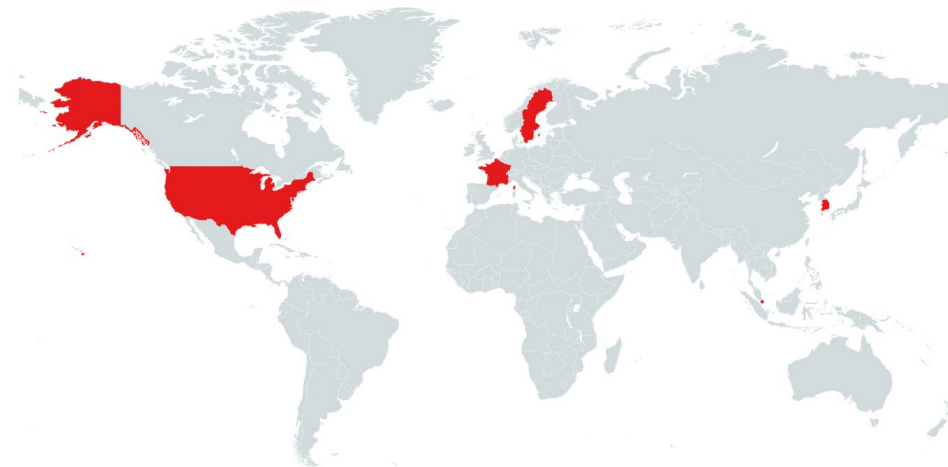
75,6 %





of total investment in Spain

69,7 %

of the total jobs created in Spain

Top 5 countries of origin of investments



-  1. United States
-  2. France
-  3. Sweden
-  4. South Korea
-  5. Singapore

Source: ACCIÓ based on fDi Markets

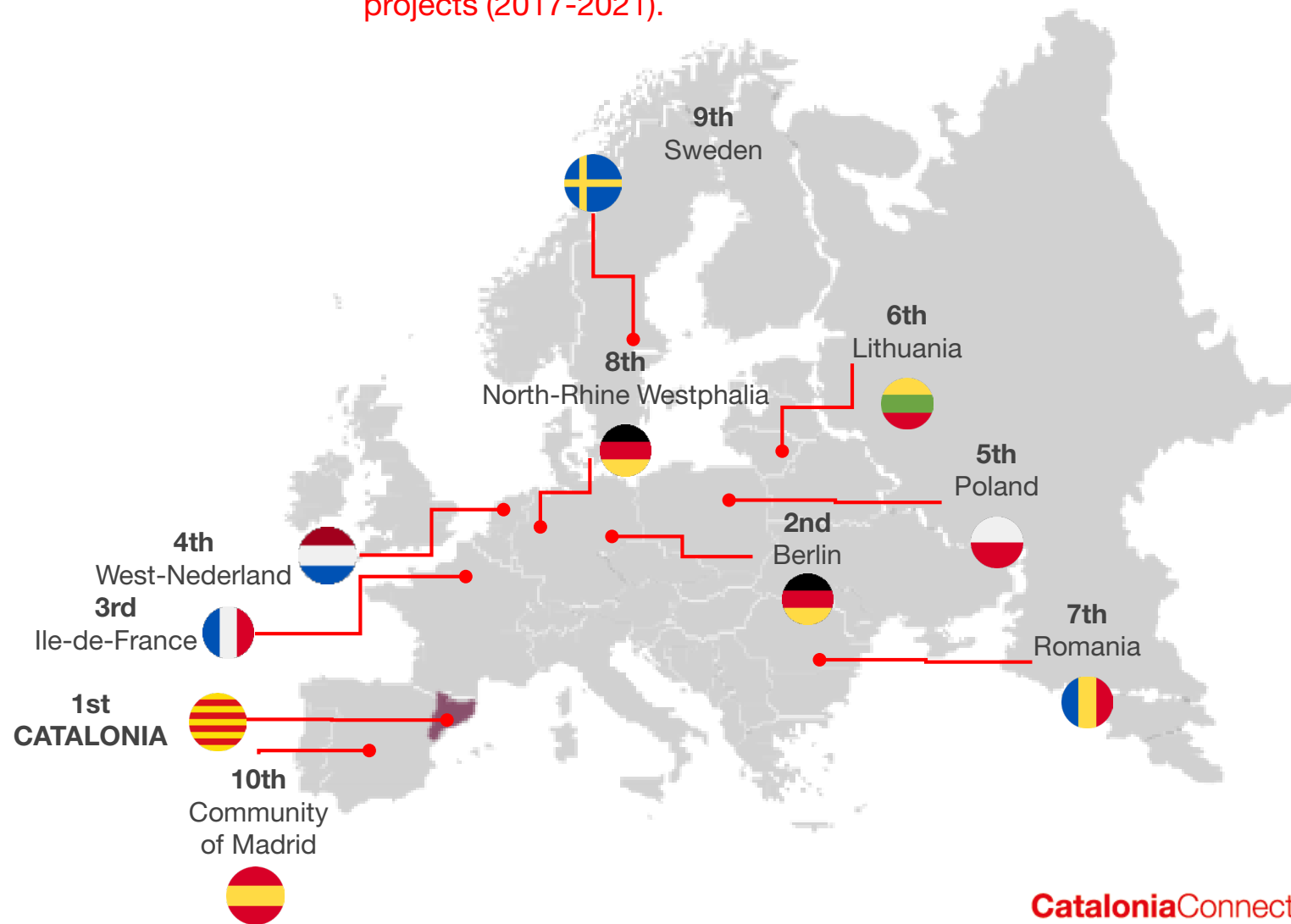
Excellent location for foreign investment (II)

- Catalonia is the region of the European Union with the highest number of projects carried out and investments received, and the 2nd in job creation.
- Foreign direct investment in the video game sector in Catalonia corresponds to **13.2% of the projects, 11.5% of the jobs created and 12.2% of investment in the EU.**



Source: ACCIÓ based on fDi Markets

FDI in the regions of the European Union, by number of projects (2017-2021).



Major international companies choose Barcelona

Ubisoft, developing AAA video games from Barcelona

The French company Ubisoft is a global benchmark in the video game sector. The firm opened a studio in 1998 in Barcelona and has since participated in several extremely successful games, such as Assassin's Creed and Rainbow Six.

[More information](#)

South Korean company Smilegate opens its first international studio in Barcelona to design triple-A video games

From this new centre, where the company has already hired 35 workers, it will centralise its growth in the western market with the aim of being "a successful Triple-A Open World Video Game Studio".

[More information](#)

CI Games opens video game development studio in Barcelona

CI Games CEO Marek Tyminsky said Barcelona has an "increasingly consolidated digital, technological and gaming ecosystem" and was "very pleased to be part of it". "We're here to stay," he says.

[More information](#)

The video game company King opens new headquarters in Barcelona with 600 employees and the capacity to increase the workforce by 10%

The British video game company King has opened its new headquarters in Barcelona to consolidate the city as one of the brand's main development HQs in Europe.

[More information](#)

Japanese group BANDAI NAMCO to establish a new company dedicated to the development of mobile games in Barcelona

Specialising in the creation and commercialisation of video games, BANDAI NAMCO will centralise the western development and marketing of mobile entertainment products at the Catalan capital.

[More information](#)

Javier Ferreira, Scopely: "We wanted to create a European hub for our global expansion efforts and Barcelona was the perfect fit"

Scopely is an interactive entertainment company and mobile games publisher headquartered in Los Angeles (USA) and with operations in Barcelona. The company has a diverse portfolio of original franchises, including the award-winning *Star Trek™ Fleet Command* and *Looney Tunes™ World of Mayhem* and has received the support of *Catalonia Trade & Investment*.

[More information](#)

Source: ACCIÓ

Barcelona, a very powerful digital hub in video games

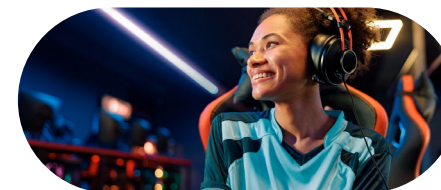
Barcelona is a priority destination for major international companies seeking to create tech and digital hubs.

As home to Mobile World Congress and already a global benchmark in mobile games, video game and e-sports companies choose Barcelona and tap into the opportunities of the existing hub to invest in AAA studios in Barcelona-Catalonia.

Companies that have installed new innovation hubs in video games, mobile and internet (2018-2021)



Triple A and e-sports companies installed in Catalonia



Source: ACCIÓ

The importance of mergers and acquisitions in the sector is growing

Mergers and acquisitions of Catalan video game companies in 2021 and 2022:



Note: Only acquisitions are included here

Source: ACCIÓ

Catalonia, hub of attraction for young professionals, researchers and video game developers

Barcelona is the 9th favourite city in the world for work by foreigners (*Decoding Global Talent, Onsite and Virtual, BCG, 2021*)

Catalonia is the **8th region in Europe** with the largest **digital human capital** (*DESI, 2019*)

Barcelona, **5th** city in Europe in terms of the number of **creative jobs** (*Cultural and Creative Cities Monitor, 2020*)

Barcelona is the **7th most attractive city in Europe** for **students** (*QS Best Student Cities, 2019*)

*“To create a **high quality video game** you need **talent**, and this talent can be found in **Barcelona**”*



Cost of living

In comparison with other **major European cities**, Barcelona has a very **attractive cost of living**. (*fDi Benchmark, 2022*)

Barcelona has very **competitive** labour costs and **top class professionals** from around the world. (*fDi Benchmark, 2022*)

Barcelona is the **7th most attractive** city in terms of the price of **offices** (\$250/week) and **coworking spaces** (\$380/month). (*Tech Cities in Motion, 2019*)



Barcelona – 61.1



Berlin – 68.94



Paris – 84.35



London – 85.62

(*City cost of living index, Numbeo, 2022*)

Quality of life

Barcelona, **3rd** best city in the world in terms of **quality of life**. (*Global Power City Index, Institute for Urban Strategies The Mori Memorial Foundation, 2021*)

Barcelona, **4th** city in the world in quality of life in **tech lifestyle**. (*Tech cities, Savills, 2020*)

Spain is the **healthiest country in the world**. (*Healthiest country index, Bloomberg, 2019*)

Sea, mountains, cuisine
And a unique cultural,
artistic and architectural heritage in the
world



Source: ACCIÓ and fDi Benchmark

A leading educational system in the field of video games

The Catalan university system is noteworthy for its capacity to attract local and international talent.

Talent from Catalan schools of animation and special effects is having a major impact on the global video game sector.

Bachelor's degrees related to video games in Catalonia

UVIC **Multimedia:** apps and video games

enti Centre d'activitats
UNIVERSITAT DE BARCELONA
INSTITUT D'INVESTIGACIÓ EN TÈCNIQUES DE LA COMUNICACIÓ

- Development** of Video games
- Digital Art** for Video games
- Production of Music and Sound** for the Entertainment Industry



Universitat de Girona

Design and Development of Video games

TecnoCampus

- Design and Production** of Video games
- Computer Management and Information Systems** and Video game **Design and Production**
- Design and production** of video games and audiovisual media

UNIVERSITAT POLITÈCNICA DE CATALUNYA BARCELONATECH

Design and Development of video games

laSalle **Multimedia Engineering** (Major in Video games)
UNIVERSITAT RAMON LLULL

6 MASTER'S DEGREES

CEV enti laSalle UOC upf.

7 COURSES

CEV UAB













7 HIGHER DEGREES (CFGs)

CEV eAD enti Escola Pia Granollers UVIC












Source: ACCIÓ based on university websites

Catalonia has a wide range of studies in video games (I)

Degrees in video game development and production

-  **ENTI** Interactive Digital Content
-  **ENTI** Artistic Creation for Video Games
-  **ENTI** Music and Sound Production for the Entertainment Industry
-  **CITM** Video game design and development
-  **CITM** Design, Animation and Digital Art
-  **CITM** Multimedia
-  **Universitat de Girona** Video Game Design and Development
-  **upf.** Video Game Design and Production
-  **upf.** Computer Engineering and Video Game Design and Production
-  **UVIC** Multimedia. Applications and Video Games
-  **laSalle** Multimedia Engineering – Major in Video Games
-  **Universitat de Lleida** Escola Politècnica Superior Digital Design and Creative Technologies








Master's and postgraduate degrees in video game creation

-  **ENTI** Game, gamification and technology applied to education
-  **ENTI** Music and sound for entertainment experiences
-  **UPC** Animation & Digital Arts for AAA Video Games
-  **UPC** Advanced Programming for AAA Video Games
-  **upf.** BARCELONA SCHOOL OF MANAGEMENT Videogames: Design, Creation and Programming
-  **laSalle** Advanced Video Game Development
-  **laSalle** Animation and visual effects
-  **uoc** Video Game Design and Programming
-  **CEV** 3D Art, Animation and Visual Effects for Video Games and Cinema
-  **CEV** 3D Content creation for Animation, Games and visual Effects
-  **CEV** Houdini for VFX










Source: ACCIÓ

Catalonia has a wide range of studies in video games (II)

Higher level training cycle in video game creation

- 
ENTI CFGS in 3D animations, games and interactive environments
- 
ENTI CFGS Development of multiplatform applications – Profile video games and digital leisure
- 
UVIC CFGS 3D Animations, Games and Interactive Environments (UVIC)
- 
ioc Higher level training cycle in 3D Animations, games and interactive environments
- 
Escola Pia de Catalunya TRAINING CYCLE DAM-VIDO
- 
eA d'Art i Disseny reus CFGS Videogames and Digital Environments
- 
CEV CFGS in 3D Animations, Games and Interactive Environments + HND in Video Game Design and Development
- 
CEV HND in creative media production & videogames development – Course on 3D animation and professional computer graphics
- 
Deià Escola d'Art i Disseny CFGS of Plastic Arts and Design in Animation. Profile video games and virtual environments
- 
EA ESCOLA D'ART I DISSENY DE VIC Animation CFGS. Profile Videogames and Virtual Environments (Escola d'Art de Vic)

Courses on video games

- 
CEV Specialization in Digital Illustration and Concept Art
- 
CEV Specialization in Visual Effects (VFX)
- 
CEV Specialization in 3D Texturation with Substance Painter
- 
CEV Specialization in 3D Modeling with ZBrush
- 
CEV Specialization in 3D Animation
- 
CEV Specialization in procedural modeling with Houdini
- 
CEV Summer Intensive Courses: animation, illustration, programming or design
- 
escolajoso Digital character sculpting for video games and cinema
- 
escolajoso Animation, Specialization Acting 2D and 3D

Source: ACCIÓ

Catalonia has a wide range of studies in video games (III)

MOOC en videojocs (*massive online open course*)

UAB Video games: what are we talking about?

UAB Video game design

UAB 3D art and animation in video games

UAB Graphics engines in video games: game engine

UAB Gameplay in video games

MICHIGAN STATE UNIVERSITY Pixel Art for Video Games

MICHIGAN STATE UNIVERSITY Low Poly Art For Video Games

MICHIGAN STATE UNIVERSITY Concept Art for Video Games

MICHIGAN STATE UNIVERSITY Game Design and Development Specialization

CaLARTS Introduction to Game Design

CaLARTS Story and Narrative Development for Video Games

CaLARTS World Design for Video Games

CaLARTS Character Design for Video Games

 **unity** Unity Certified 3D Artist Specialization

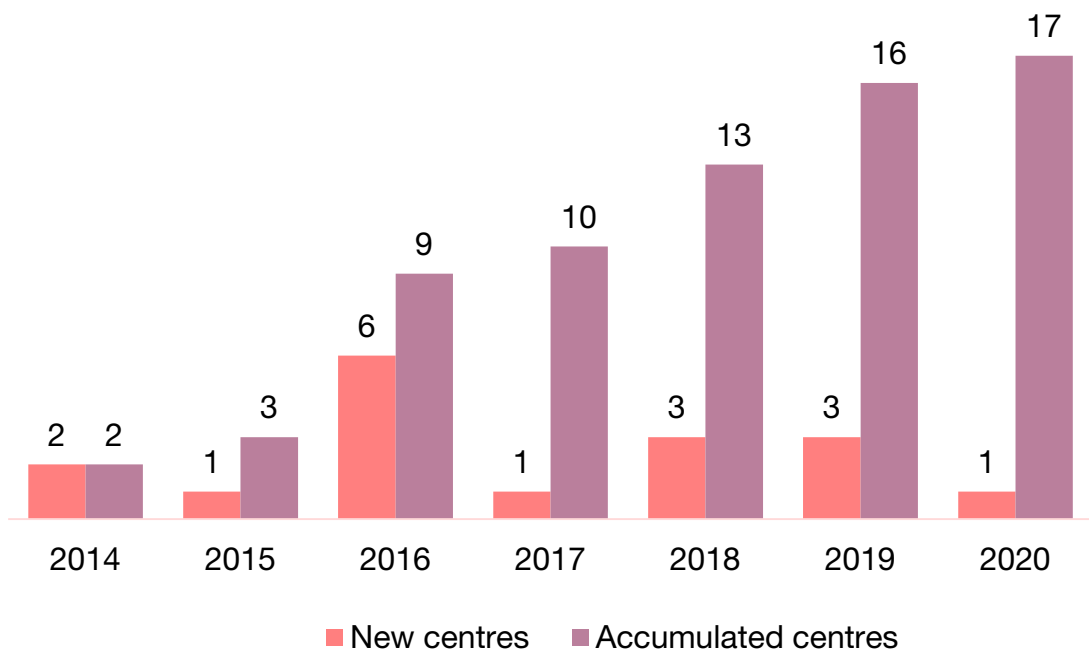
 **University of Colorado Boulder** C# Programming for Unity Game Development Specialization



Barcelona also leads the way in coding bootcamp training and in digital training underway

40% of all Spanish centres offering **bootcamps** are located in **Barcelona**. Most of the bootcamps in Barcelona are **newly created** (82% were established in the past 5 years).

Centres offering bootcamps in Barcelona per year of creation



Wide range of ITC coding bootcamps



Centres offering ongoing digital training



Source: ACCIÓ, based on the report "Digital Talent Overview 2021" by Barcelona Digital Talent and "The best Barcelona coding bootcamps of 2022" by Course Report

Barcelona provides support to talented people in situations of vulnerability

The **BCN Inclusive Coding Programme** is a public-private collaboration that provides support to talented people in situations of vulnerability at all stages of the process until their training begins as a digital professional. Four lines of action have therefore been identified to ensure that future digital talent have all the resources and tools to join the job market.

Objectives

- Hire 10,000 digital professionals in the next 10 years to combat the digital divide.
- Reduce social exclusion
- Promote digital training
- Promote social responsibility
- Generate vocations for digital professions



Recruitment

Connection with the Red Cross of Catalonia network and community to identify people eligible to receive digital training



Training Guidance

Promotion of an external mentoring programme made up of several social entities to advise people on the technical and transversal skills that they have to develop.



Digital Training

Training centres and social organizations in Catalonia such as **MigraCode Barcelona** (migrants and refugees), **Factoria F5** (women and long-term unemployed), **Fundación Esplai** (young people, migrants and people in situations of vulnerability) and **Barcelona Activa**. These centres already have quality digital training programmes aimed at students in vulnerable situations. This is where students are trained.



Access to Jobs

Organization of a recruitment day for companies and talent with the aim of connecting digital profiles with technology companies and facilitating people's insertion into the labour market. Once the person has been hired, they are assigned an internal mentor to ensure the success of the insertion process.



Source: ACCIÓ, based on the report Barcelona Inclusive Coding 2022 by Barcelona Digital Talent.

Trained students are being interviewed by the best digital companies.



3 training centres



2 public administrations and one large social entity



320 people trained in full stack development



24 signatory companies



13 companies interviewing candidates using the speed dating method



€700,000/year (€4,000 in training per student + management fees)

24 companies are committed to the project



Adevinta

Capgemini



atmira

cx:gen

Globant

telanto



basetis



codurance



ClimatePartner



endesa



Platformable



Source: ACCIÓ, based on the report Barcelona Inclusive Coding 2022 by Barcelona Digital Talent.

Trends in the video game sector

Gamification

Gamification is the application of game design elements and gaming principles in contexts that do not belong to this field to implement the latest methods, tools and solutions into business. The **pharma or medical industry**, which are extremely powerful in Catalonia, could adopt these innovations for training or work experience purposes.

Virtual and augmented reality

Virtual and augmented reality are technology based on the creation of an immersive environment that complements real-life visits with computer-generated sensory-based input, such as images or sound. Spain is the country with the **highest percentage of consumers with the intention to purchase**, and Barcelona has the most powerful ecosystem in video games, tech centres, and important international congresses.

Blockchain

The video game industry uses non-replaceable digital assets such as non-fungible tokens or NFTs (cryptography-based digital assets) to turn the play to earn model into reality, where players are rewarded for playing.

In Catalonia in 2020, there were 76 companies dealing in Blockchain (117% increase in relation to 2018). Overall, Blockchain in Catalonia generates **400 jobs and a turnover of 9.46 million euros**.

Serious Games

Serious games are a new way of **learning** and **entertainment** applied in companies and public institutions to **simulate situations**. Most recent data indicates a significant growth (**19.2% between 2017 and 2023**) due to its **cross-cutting nature** and application (financial services, marketing, education or construction). Catalonia has a **major ecosystem** devoted to *Serious Games*, with events such as the Serious Games Camp, specialist training at the University of Barcelona School of New Technologies or video game development companies such as VRMax and ViOD Games Studios.

Metaverse

Younger generations have one foot in the metaverse via gaming and social media The metaverse is the universe of virtual worlds that are all interconnected. The younger generations are especially attracted by video games, and classify them as their favourite form of entertainment (they have an emotional value for many, helping them relax, stay connected with others, and express their own identity).

In 2022, Catalonia created its own metaverse promoted by the Generalitat and the Barcelona Chamber of Commerce through the Blockchain Centre of Catalonia (CBCat), CatVers, to become the benchmark virtual space for the Catalan society.

Source: ACCIÓ based on PwC Entertainment and Media Outlook 2018-2022, DEV, 2019, White paper on the development of video games, Global Cloud Gaming Market 2019 2024, MarketsandMarkets and *Global Games Market Report, Newzoo, 2019. Deloitte: Younger generations have one foot in the metaverse via gaming and social media 2022.*

Trends in the video game sector (II)

Cloud Gaming

Cloud gaming is a new form of organising the running, playing and distribution of video games via a central server that processes the game and streams the images to a wide range of machinery that only requires an internet connection. **A 59% growth in TCAC is expected by 2024.** Barcelona has one of the fastest internet connections, important tech centres, and competitive operating costs.

Game Porting

Game porting is a term used when a video game designed to be run on a platform is converted to be run on a different platform. Barcelona has a **wide range of very well prepared software developers** at a competitive cost, a powerful video game ecosystem, related tech centres dedicated to the video game industry, and top class international trade fairs.

e-Sports

e-Sports are competitive, professional games in an organised format in which a clear distinction is made between players and teams that compete under the same conditions. In Spain, it is expected to increase at a **CAGR of 27.1%** (forecast of €16.2 M) **by 2022.** Barcelona **has already hosted international e-Sports competitions** and has TV channels and professional clubs.

Talent

The specialist training of the necessary professional profiles for the video game sector will remain a future trend. Continuing to attract international talent will also be key for future talent. The Catalan video game sector is one of the strongest in Europe, thanks to one of the main assets of Catalonia, **the most avant-garde talent and creativity.**

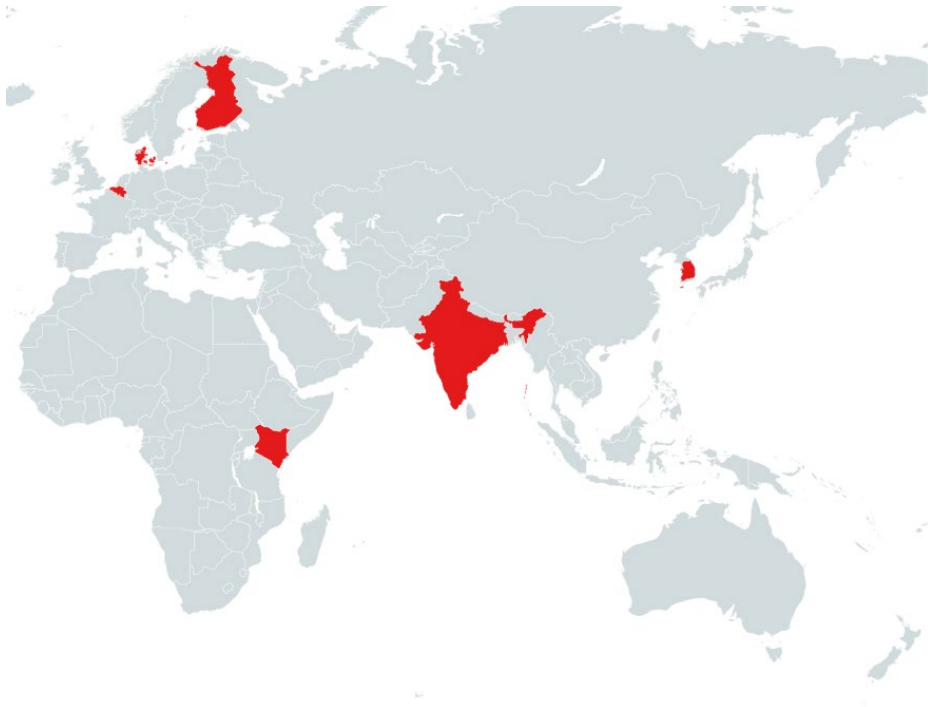
Financing

One of the main challenges of Catalan and Spanish companies in the sector is financing. This financing is linked to different times in the lives of companies: to be able to start their initial projects, to maintain daily operations, and to be able to tackle new projects. The need for access to specific funds from sectors that are familiar with the needs of video game companies is also a challenge for companies that must currently look for these investors abroad.

Source: ACCIÓ based on PwC Entertainment and Media Outlook 2018-2022, DEV, 2019, White paper on the development of video games, Global Cloud Gaming Market 2019 2024, MarketsandMarkets and *Global Games Market Report, Newzoo, 2019. Deloitte: Younger generations have one foot in the metaverse via gaming and social media 2022.*

International business opportunities in the video game sector

WORLD



6 opportunities related to the video game sector



Denmark

Denmark and video games: a new wave of success.



Finland

The gaming boom in Finland.



India

India, interested in video games, electric and connected vehicles and 5G.



South Korea

Digital content, metaverse.



Belgium

Main destination of audiovisual and video game production companies.



Kenya

Kenya and ICT: Silicon Savannah.



Source: World map of international business opportunities, 2022

Thank you!

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accio.gencat.cat
catalonia.com

 @accio_cat

 @catalonia_ti