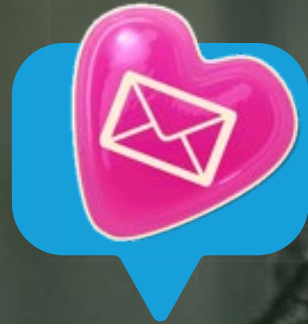


# Mobile Matters

The Impact of Mobile Games for Europe



# Foreword

For hundreds of millions of players across Europe, enjoying video games does not start on a console or a PC. **It starts on a mobile phone.**



Mobile games are now the most accessible and most common way people experience video games. They give people more choice in how, when and where they play, and have become part of everyday life across Europe.

The mobile games industry is a diverse and entrepreneurial ecosystem of businesses across Europe, from major publishers and developers to smaller independent studios. It is a European success story with global reach. Europe played an important role in the development of mobile games and today, the sector contributes significant economic value, supports thousands of skilled jobs, and connects European creativity and entrepreneurship with global markets.

But the impact of mobile games, and video games more broadly, goes beyond economics alone. They are built through a combination of creative and technical skill, and can nurture creativity and build digital confidence. That broader contribution is part of what makes the sector important not only to Europe's economy, but to its cultural and social fabric too.

At King, we are proud to be part of this story. Mobile is our home, and for more than two decades we have built long-term relationships with players. We know that trust matters, and we recognise that a successful mobile games sector must also be a responsible one, where positive player experiences and player safety sit alongside growth and innovation.

Europe's strength and heritage in mobile games should not be taken for granted. The global market is moving quickly, with countries including China and Turkey are building highly competitive and technology-driven mobile games ecosystems and competing for talent, investment and audiences. If Europe wants to maintain its position as a hub for creative and digital businesses, it needs to support the industry's ability to invest, innovate and grow.

This report comes at an important moment. As policymakers consider the future framework for digital regulation in Europe, there is an opportunity to support one of the region's most dynamic creative and digital sectors at a time of intensifying global competition and rising development costs.

Regulation has an essential role to play in protecting players, and it should reflect the context in which mobile games operate and how players choose to interact with them, alongside the concerns policymakers may have. Getting that balance right will help ensure Europe remains an attractive environment for investment, creativity and technological innovation.

This report is intended to help inform the conversation. It reflects on the rise of mobile games in Europe, examines how the industry works today, and explores the contribution mobile games make across the region. If Europe is to remain competitive on the world stage, policymakers will need a clear understanding not only of the value the sector already creates, but also of the conditions that enable the mobile gaming ecosystem to continue to grow, innovate and reach global audiences from Europe.

A handwritten signature in black ink that reads "Todd Green".

**Todd Green**  
President



# Executive Summary: Mobile Games in Europe

At the heart of this report is a new economic impact assessment which presents a picture of the mobile games industry in Europe, its place in the global market, the economic contribution it makes, and the role it plays in supporting Europe's digital competitiveness.

The research also draws on existing analysis of the video games and mobile games sectors worldwide, alongside new quantitative data exploring the next generation of talent's perceptions of working in the sector.

Looking at both the global market and Europe's own market helps illustrate how mobile games have grown, how the sector works today, and the wider technological, societal and cultural benefits mobile games can bring to the region.

Mobile games have grown from a relatively small segment of the global video games industry into a dominant force in the market. They have also become significantly more competitive and concentrated over time, with rising development costs and increasing competition for player attention. While Europe remains an important centre for mobile games, sustaining that position will depend on continued innovation, investment and creative growth.

Understanding the role mobile games play in Europe today is therefore important not only for the future of the sector itself, but for Europe's wider creative and digital economy.

**€7.53bn**

in revenue generated by European mobile games companies in 2025 from markets around the world.<sup>1</sup>

**55%**

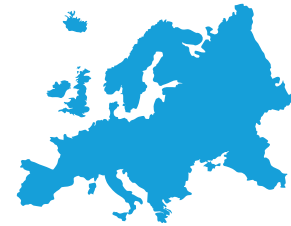
Mobile games account for over half (55%) of global games revenue.<sup>2</sup>

31 years old is the average age of a video game player in Europe.<sup>3</sup>

**31**

**€5.89bn**

in economic value contributed to the European economy by mobile games companies in 2025.<sup>4</sup>



**1,000+**

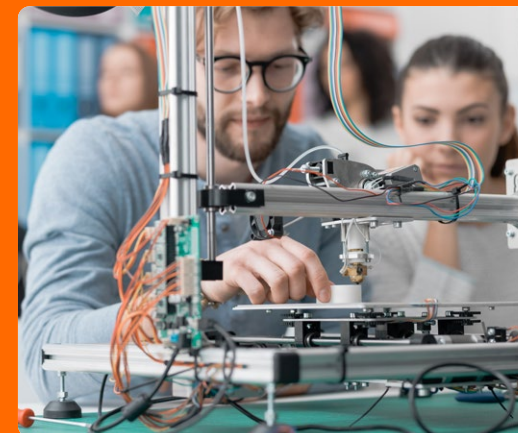
dedicated mobile games companies operating across Europe.

**61%**

of people living in Europe played on smartphones or tablets in 2025.<sup>5</sup>

**60,000+**

jobs are supported by the sector across Europe.



Young people who play mobile games at least once a week are more likely to feel confident solving technical issues.

**75%**

of video game players in Europe are adults.<sup>6</sup>



1. For European Single Market countries only, the equivalent revenue figure stands at €5.74 billion in 2025.  
 2. Newzoo's Global Games Market Report 2025.  
 3. Video Games Europe Key Facts Report 2024.  
 4. For European Single Market countries only, the equivalent GVA figure stands at €5.20 billion in 2025.  
 5. ESA Power of Play 2025 Global Video Games Report.  
 6. Video Games Europe Key Facts Report 2024.

# Understanding Mobile Games



# Mobile Games in Europe Today

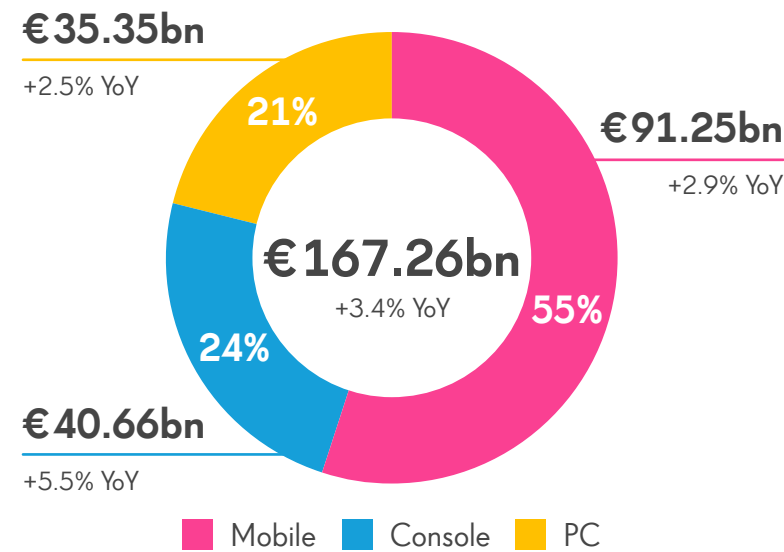
Mobile is now the most common way people experience games, enjoyed by more than 300 million players across Europe in 2025.<sup>7</sup>

In fact, this means 61% played on smartphones or tablets, by share of monthly active users.<sup>8</sup>

Mobile games, particularly free-to-play mobile games, have democratised access to games as an entertainment medium, given the widespread use of smartphones and tablets. This has expanded who plays games, with the average European video game player now being 31 years old.<sup>9</sup> What people play is evolving too, with strategy and puzzle games now two of the three fastest-growing mobile game genres in terms of time spent playing.<sup>10</sup>

The ubiquity of mobile games, and free-to-play's role in making content accessible to a wide audience, has been central to the sector's growth, both around the world and in Europe, giving consumers more choice in how, when and where they play.

## Global Revenue By Platform (2025)



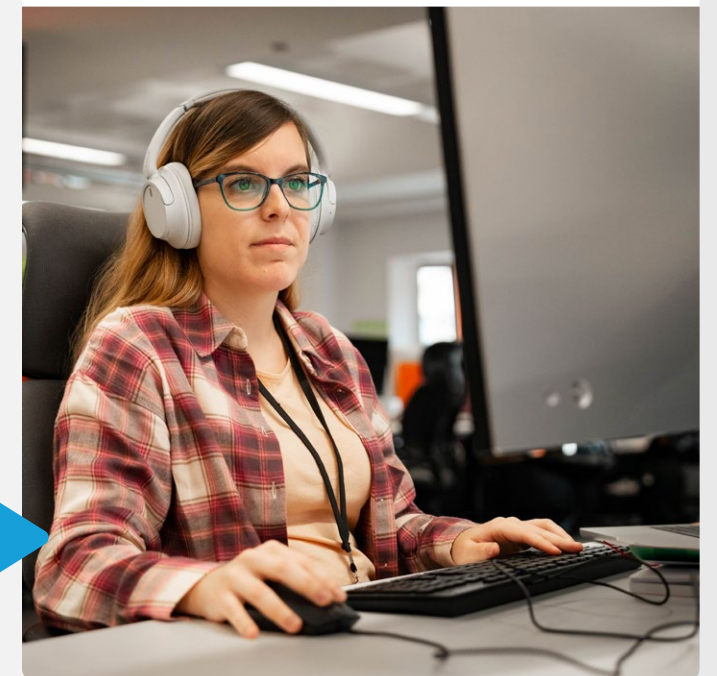
Source: Newzoo's Global Games Market Report 2025

Mobile games have grown from a relatively small segment of the global video games industry into a dominant force in the market.

In 2025, the global video games industry generated €167.26 billion in revenue. Mobile games accounted for over half of that total at €91.25 billion, ten times the revenue generated by the sector in 2012.<sup>11</sup> In terms of global economic value today, video games generate more revenue than music, radio and audio streaming, and cinema box office combined.<sup>12</sup>

# €7.53bn

in revenue was generated by European mobile games companies from global audiences in 2025.<sup>13</sup>



**30,000+**  
people are employed by European mobile games companies<sup>14</sup>

7. Newzoo's Global Games Market Report 2025.

8. ESA Power of Play 2025 Global Video Games Report.

9. Video Games Europe Key Facts Report 2024.

10. Sensor Tower State of Gaming Report 2026.

11. PocketGamer.biz.

12. King internal report September 2024.

13. For European Single Market countries only, the equivalent revenue figure stands at €5.74 billion in 2025.

14. The equivalent data for the European Single Market is 21,000+ people employed.

# Europe's Role in the Rise of Mobile Games

Europe has played a fundamental role in the rise of mobile games and remains one of the industry's most important centres of creativity and innovation.

To this day, games made in Europe are played by hundreds of millions of players around the world.

One of the earliest recognisable milestones came in 1998, when Nokia's *Snake* introduced the public to video games on mobile devices. The modern mobile games industry began to take shape around 2008, with the arrival of the iPhone and the App Store, which made it easier for players to discover and download games designed for touchscreen play.

By 2012, as the sector underwent sustained growth, four of the world's top 10 grossing mobile games companies were based in Europe. European developers and publishers were able to build on that early momentum, with Europe-born titles becoming emblematic of mobile games and helping to establish the sector's global profile.

Europe produced many of the titles that helped define mobile games as a global category.

Finland was home to two of its most internationally successful hits: the early breakout cultural phenomenon, Rovio's *Angry Birds* and Supercell's defining free-to-play strategy game *Clash of Clans*. Ustwo's *Monument Valley*, from the UK, demonstrated that mobile games could stand out for artistic ambition and distinctive design, while King's own *Candy Crush Saga*, originating in Sweden, became one of the defining examples of casual mobile games.



## Entrepreneurial success in Europe's mobile games industry

Entrepreneurship remains an important part of Europe's mobile games story.

Toppluva, a three-person studio founded by three Swedish brothers, found global acclaim with its award-winning *Grand Mountain Adventure* series. Since launching in 2022, the series has been played by more than 30 million players, showing how smaller studios can achieve international success through mobile-first innovation, distinctive design and strong player experiences.



**30 million+**  
players

# How the Mobile Games Sector Works

More than their PC or console counterparts, mobile games are most often enjoyed as free-to-play experiences, with more than 97% of mobile games downloads worldwide being free-to-play.<sup>15</sup>

This has helped broaden consumer choice and make games available to a much wider audience.

The free-to-play model allows players to download and play a game with no upfront cost, and the vast majority of players play without spending any money. Revenue is generated through optional purchases of in-game content and, often, in-game advertising. These can take different forms, including **consumables** such as in-game currencies, extra lives and boosters or **enhancements** including advert removal options, cosmetic content or 'skins'.

This model gives players greater flexibility over whether, when and how they spend. The fact that 97% of European mobile gamers play free-to-play games, representing over 320 million people in Europe,<sup>16</sup> is part of what has made the format so popular. But for companies to continue offering games in this way, the model still needs to be commercially sustainable.

Developers need to keep investing in the design, development and long-term operation of their

games, even where players can play for free. Mobile games are not simply launched and left unchanged; they are updated, maintained and refined over time to support player experiences and long-term engagement.

Distribution is also a central part of the operating model, shaping how games are discovered, downloaded and sustained in an increasingly crowded global market. As a result, attracting and retaining players is a major area of investment for the industry. Across Europe, publishers spend 41% of annual expenditure on player acquisition and retention, reflecting both the intensity of competition within mobile games, and wider competition for audiences across digital entertainment.

These market dynamics are important when considering the impact of additional regulatory burden. For many businesses, especially smaller ones, the challenge is not simply growth, but managing the rising cost of operating and sustaining games over time.

Global market trends reflect this increasing maturity. While annual downloads have declined in recent years, revenue for digital content has continued to grow.<sup>17</sup> This points to a more concentrated and competitive market, where players are choosing to play fewer games, and where success depends increasingly on long-term operation, regular content updates and ongoing player engagement, rather than purely acquiring new users.

Mobile games have widened access to play and given consumers more choice in how, when and where they engage. But they should also be understood as a distinct and evolving part of the wider games industry, shaped by free-to-play models, long-term live operations and intense global competition. Sustaining these experiences, and the studios that support them, requires ongoing investment in technology, content and player support over time.



## Examples of optional purchases in free-to-play games



**Consumable content:**



**In-game currencies**



**Extra lives**

**Boosters**



**Enhancements:**

**Cosmetics & skins**



**Advert removal options**



15. Singular.com.

16. Sensor Tower data F2P vs. premium MAU share in Europe for 2026, applied to Newzoo player estimates.

17. Sensor Tower – The State of Mobile Games Report 2026.

# Mobile Games' Economic Contribution to Europe



# A Meaningful Economic Force in Europe

Europe’s mobile games sector is a significant source of economic value, skilled employment and export revenue.

A new economic assessment commissioned by King estimates that Europe’s mobile games studios contributed an estimated €5.89 billion in total Gross Value Added (GVA) in 2025 and supported 63,340 full-time equivalent jobs. Conducted by Nordicity, an international research and consulting firm specialising in creative and digital industries, the study found that the equivalent figures for the European Single Market stand at €5.20 billion in total (GVA) and 50,330 jobs.

The growth outlook is also important. By 2028, total GVA generated by Europe’s mobile games studios is forecast to rise to €6.17 billion, an increase of 4.8%, showing the potential to continue growing as part of Europe’s wider digital economy.

“Mobile games are a real strength in Europe’s games sector. Through free-to-play and mobile-first design, the sector has expanded consumer choice, democratising access to games and building experiences that reach audiences around the world.”

— Simon Little, CEO, Video Games Europe



The economic impact of European mobile games studios

**€5.89bn**

in total GVA was contributed to the European economy by Europe’s mobile games studios in 2025.<sup>18</sup>

**63,340**

full-time equivalent jobs supported.

**€6.17bn**

in total GVA is forecast to be generated by Europe’s mobile games studios by 2028, an increase of 4.8%.<sup>19</sup>

## About the Research

Nordicity’s analysis covered 32 European jurisdictions and more than 1,000 dedicated mobile games studios and excludes studios which may include mobile as part of a broader industry platform focus. Economic impact was measured through GVA and employment, including direct, indirect and induced effects. The modelling was based on expenditure and in-country spending, i.e. extending through their supply chains and the resulting spending of wages across the economy, rather than operating profit. Taken together, this provides a conservative view of the mobile sector’s economic footprint.

18. €5.20bn in total GVA was contributed to the European Single Market by mobile games studios in 2025, supporting 50,330 jobs.  
19. €5.45bn in total GVA is forecast to be generated by mobile games studios in Europe’s Single Market by 2028, an increase of 4.8%.

# Global Reach and Regional Strength

Europe is not just a market where mobile games are played. It is also a creator economy with global reach.

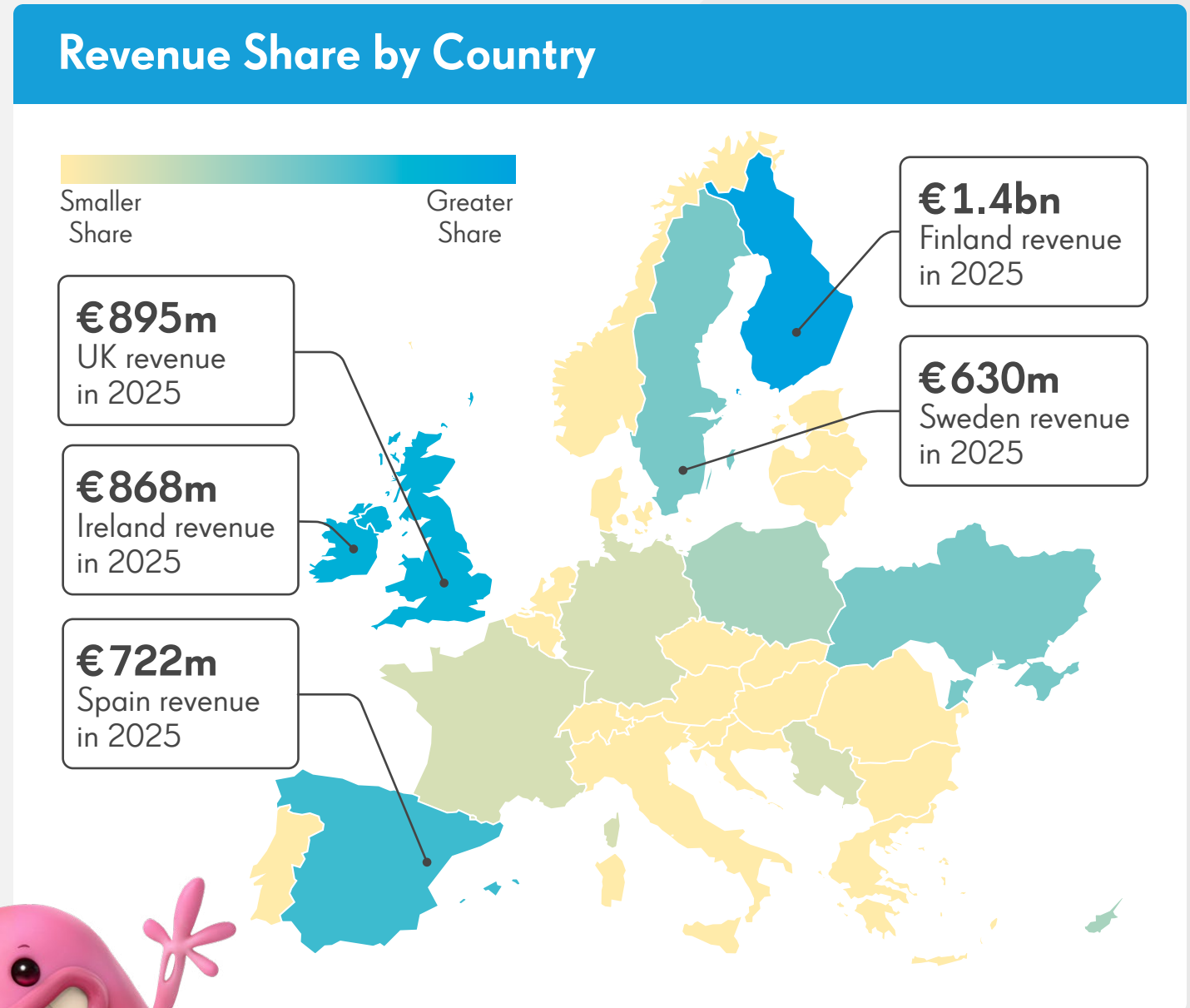
In 2025, European mobile games studios generated around €7.53 billion in revenue<sup>20</sup> from global audiences.<sup>21</sup> That figure is forecast to rise to over €8 billion by 2028,<sup>22</sup> equivalent to a 2.2% compound annual growth rate.<sup>23</sup>

The mobile games industry is not only commercially significant in Europe, but also globally connected and export-led. Games made and operated in Europe reach hundreds of millions of players around the world, generating international revenue and reinforcing Europe's position in a highly competitive global sector.

That strength is visible across the continent. Revenue is concentrated in established hubs such as Finland, Ireland, Sweden, Spain and the UK, where major developers and publishers maintain corporate offices and development studios. These are some of the places where Europe's mobile games industry is most established and internationally competitive.

But the sector is not defined by those hubs alone. When revenue is viewed relative to a country's broader market activity and purchasing power, an additional perspective emerges. Countries such as Cyprus,<sup>24</sup> Serbia and Ukraine perform more strongly than their wider economic standing might suggest, showing that mobile games can also be a source of entrepreneurial and creative strength in places policymakers and stakeholders may not immediately expect.

This points to an industry that combines global commercial reach with a broad base of regional innovation. Europe's mobile games sector is anchored by major hubs, but it also contains emerging pockets of strength that reflect the ambition and entrepreneurial energy of the wider ecosystem.



20 For European Single Market countries only, the equivalent revenue figure stands at €5.74 billion in 2025.  
 21., 22. Based on custom data export from Sensor Tower; range Jan. 1st 2025 to December 31st 2025; EU Attributable Publishers.  
 23. Revenue generated by European mobile games publishers within the European Single Market is expected to grow by a CAGR of 2.2% over the next three years to reach €6.13 billion by 2028.  
 24 Data pertaining to Cyprus excludes publishers which are operated out of Russia or Belarus but have set their publisher locations to Cyprus.



# Regional Spotlight: Sweden, Spain and the UK

The economic contribution of the mobile games industry is visible across Europe, and here we feature three of the top five mobile games markets by revenue, which together are home to the majority of King’s workforce.

Each represents a different part of the wider European mobile games story, from established publishing and development strength to distinctive local ecosystems and future growth potential.



25. Catalonia Trade & Investment.



## Sweden

Sweden stands out as a mobile games hub because of its combination of creative and technical expertise, collaboration between studios, talent networks, education providers and industry bodies, and access to global markets, reinforced by educational programmes, industry support structures and access to investment.

<b>€630m</b> Total revenue	<b>2,410</b> Total FTEs
<b>€154.9m</b> Total GVA	<b>€163.5m (+5.5%)</b> 2028 forecasted GVA growth

“The games industry in Sweden is one of the country’s strongest exports. It’s a creative industry built on a combination of technical expertise, entrepreneurship, talent and a love for games. Mobile games are central to that story, showing how Swedish creativity can reach players around the world.”

— **Johanna Nylander,**  
Acting Managing Director,  
Swedish Games Industry



## Spain

Spain’s strength in mobile games is driven by a vibrant start-up culture, specialist support services, regional policy backing and foreign direct investment. Barcelona, home to more than 120 studios, has quickly become one of Europe’s leading mobile games hubs. Catalonia generates over half of Spain’s video game revenue<sup>25</sup> and hosts the Mobile World Congress, the world’s largest mobile trade show. Together, this concentration of talent, investment and entrepreneurship is helping Barcelona compete internationally as a centre for mobile games innovation.

<b>€722m</b> Total revenue	<b>2,670</b> Total FTEs
<b>€103.2m</b> Total GVA	<b>€108.4m (+5.1%)</b> 2028 forecasted GVA growth

“Spain’s games industry is a dynamic and increasingly mature part of Europe’s creative economy. Built on creative talent, technical expertise and entrepreneurship, the sector is attracting investment and reaching audiences well beyond Spain. Mobile games have played an important role in that growth.”

— **José María Moreno,**  
Managing Director,  
AEVI



## UK

The UK remains one of Europe’s largest and most established games industries, with a strong base in mobile publishing and development, supportive tax reliefs, and a wider ecosystem of companies supporting analytics, marketing and live operations.

<b>€895m</b> Total revenue	<b>5,060</b> Total FTEs
<b>€236.5m</b> Total GVA	<b>€257.6m (+9.1%)</b> 2028 forecasted GVA growth

“The UK’s games sector is a vital part of the country’s Createx economy, bringing together creativity, technology and innovation to create world-class interactive entertainment. Mobile games play an important role in that success, lowering barriers to play and helping more people experience the creativity, innovation and cultural value of games.”

— **Nick Poole,**  
CEO,  
Ukie

# Not Just Economics: The Social, Cultural and Technological Impact



# Why Games Matter Beyond the Screen

Economic contribution is an important part of the picture, but it is not the whole story.

Mobile games are often discussed in terms of reach, popularity and accessibility. Those same qualities also help explain why they can create cultural and societal value. As an interactive and widely enjoyed form of entertainment embedded in routines across Europe, mobile games can shape how people engage with ideas and issues that go beyond the screen.

The wider value is shaped by the creativity and ingenuity involved in making video games. By combining design, storytelling and advanced digital tools, games can support new forms of innovation. As the European Commission highlighted in its European Media Industry Outlook report 2025, game development drives innovation in areas such as AI and real-time graphics, leading to cross-sector collaboration between creative industries, technology companies and education providers.

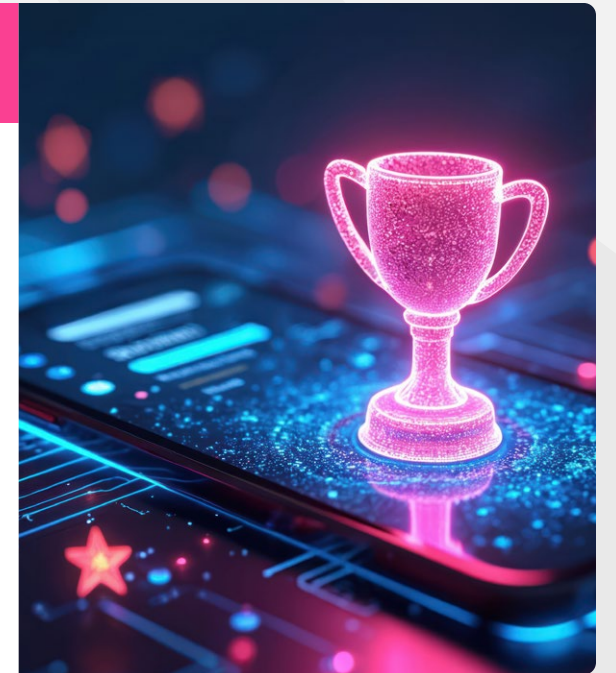
Video games can also help reinforce confidence in creative and digital skills and engage players with social and environmental issues. They can provide a platform for originality and entrepreneurship, all of which challenge narrow assumptions about what mobile games are and what they can offer.

People turn to video games not only for fun, but also to relax, relieve stress and keep their minds active.<sup>26</sup> Mobile games are particularly well suited to this because they offer interactive, flexible experiences that can fit easily into short moments in the day.



## Focus on Innovation

The games industry has long used Machine Learning (ML) and Artificial Intelligence (AI),<sup>27</sup> evolving from basic rule-based systems to more advanced techniques that continue to bring new innovation into modern game development. This continued innovation strengthens Europe's digital ecosystem and reinforces the games industry's role as a test bed for ideas with wider relevance and application, as recognised in the European Commission's Apply AI Strategy.



26. ESA Power of Play 2025 Global Video Games Report.

27. Games are the driving force of the digital revolution (2021).

# Mobile Games, Skills and Digital Confidence

Few sectors bring together such a diverse mix of skills as clearly as video games.

The industry depends on designers, artists, engineers, producers and specialists in emerging technology such as AI, working together to create experiences for players.

This combination of creative and technical expertise is increasingly valuable to advanced economies. Countries including Australia, France, Germany, Singapore, Sweden, the UK, and the US, use visa routes to attract talent in high-demand sectors, including games, technology and specialist digital roles. Developing and retaining home-grown talent is therefore critical to ensuring that young people can contribute to innovation, competitiveness and long-term economic growth across Europe.

More broadly, the European Commission has also highlighted the video games industry's role in developing and growing innovative technology,<sup>28</sup> while industry bodies have argued that games-sector technologies often find wider applications in areas such as education, healthcare, robotics and automotive interfaces.<sup>29</sup>

In a world of work shaped by rapid technological change, this matters more than ever. Success increasingly depends not only on knowing how to use technology, but also on being able to apply it creatively.

Mobile games sit at the heart of this intersection, bringing together creative thinking, technical problem-solving and complex digital systems. King surveyed more than 1,500 young people aged 16 to 21 across the UK, Spain and Sweden, exploring how they engage with mobile games, the skills they believe they have, and how they view future careers in the sector.

The findings showed that mobile games are already part of everyday life for many young people, with almost half playing mobile games every day and 84% playing at least once a week. **According to the results, young people who play mobile games at least once a week are more likely to feel confident using advanced digital tools, solving technical issues and working with data.**<sup>30</sup>

## Opening pathways into mobile games careers

In collaboration with Junior Achievement Europe, King has launched game hackathons, mentoring and workshops across its main locations, including in Barcelona, Spain. Over two years, the partnership has reached more than 600 young people across three countries, including 225 this year, with a focus on underserved youth and widening pathways into gaming careers.



## Supporting female and non-binary talent

Working with the Swedish Games Industry, King helped create a scholarship programme for women and non-binary people entering game development. Scholars take part in an eight-month bespoke programme combining education, mentoring from King experts, masterclasses and access to industry events.



28. [The European Media Industry Outlook, September 2025.](#)

29. [European Games Developer Federation.](#)

30. The research was conducted through an online survey of 1,512 16-21 year olds in the UK, Sweden, and Spain (506 in the UK, 503 in Spain, 503 in Sweden). Fieldwork was conducted from 06 Feb 2026 to 19 Feb 2026.

# Boosting Social Impact Through Games

Mobile, together with the broader video games industry, can bring the public closer to issues that matter beyond the world of entertainment.

**Green Game Jam** is a powerful example. Run by the Playing for the Planet Alliance and the UN Environment Programme, the annual initiative brings together more than 50 games studios to embed environmental and climate change themes into games through stories, events, missions and shared in-game moments. It uses the reach and creativity of games to make global issues more accessible, showing how games can inspire participation and connect players to causes that matter beyond the screen.

One example was **FarmVille 3** which encouraged players to use “imperfect” fruits and vegetables to reduce food waste. Another example was **PUBG Mobile**, which launched its ‘Play for Green’ campaign, with maps and challenges supporting real-world conservation projects, while **Hungry Shark Evolution** introduced an in-game event focused on cleaning up ocean waste.

**Sea Hero Quest** shows a different kind of impact. Developed with Alzheimer’s Research UK, University College London and the University of East Anglia, the game used navigation-based gameplay and memory challenges to collect anonymised data on how people move through virtual environments. By mirroring real-world spatial navigation, it helped researchers explore how these abilities change over time and may relate to early signs of dementia.

Sea Hero Quest turned everyday play into a large-scale research tool, collecting data from around 4.3 million players globally, equivalent to more than 117 years of gameplay,<sup>31</sup> and remains available to researchers studying cognition and spatial navigation.

The COVID-19 pandemic further showed how games can support public engagement at scale. Through the World Health Organization’s **#PlayApartTogether** campaign, games companies helped amplify

**4.3m**

players worldwide have contributed gameplay data to Alzheimer’s research



public health messaging around physical distancing, reaching millions through platforms they already used every day. By helping people stay connected while physically apart, games supported efforts to reduce in-person contact and ease pressure on healthcare systems.

When many traditional social activities were unavailable, video and mobile games offered entertainment, interaction and community.



**50+**

studios working together to build important themes on the environment into games



31. [AlzheimersResearchUK.org](https://www.alzheimersresearchuk.org/).

## Conclusion: Why Mobile Games Matter to Europe

Mobile games have become one of the most significant parts of the global video games industry and an increasingly important part of Europe's creative and digital economy.



What began as a relatively small segment of the market has evolved into a globally connected industry that reaches hundreds of millions of players, supports skilled employment, generates substantial economic value and contributes to Europe's wider digital ecosystem.

Europe has played a defining role in that story. From early milestones in mobile play to globally recognised franchises and innovative studios, European developers and publishers have helped shape how mobile games are designed, distributed and experienced around the world. Today, the sector remains a source of creativity, entrepreneurship and technological innovation across the region.

The report also suggests that mobile games should be understood on their own terms. Their reach, free-to-play models and long-term live operations have helped broaden participation in games and create new forms of player engagement. At the same time, the sector has become increasingly operationally complex, with rising development costs, intense global competition and the growing importance of retaining long-term player engagement through continuous content creation.

Alongside their economic contribution, mobile games also contribute more broadly to Europe's cultural and technological landscape. They continue to bring together creative and technical disciplines, support digital confidence and experimentation, as well as increasing the intersection with areas such as AI and wider digital innovation.

Taken together, these findings point to a clear conclusion: mobile games are not just a successful entertainment category, but part of a broader European ecosystem of creativity, technology and digital competitiveness. As the global market continues to evolve, Europe's ability to remain a leading centre for mobile games will depend on its continued capacity for innovation, investment, entrepreneurship and creative growth.

# Methodology

## Defining Mobile Games

For the purposes of this report, mobile games are understood to be video game-style experiences designed to be played on mobile devices and smartphones. It does not include games where players can ‘cash out’ (such as gambling platforms or casino games) and focuses on games available on iOS and Android via their respective app stores (which together account for the vast majority of mobile game distribution).

## Defining European Markets

This report broadly defines ‘Europe’ as a geographic entity, rather than a political one. As such, the report defaults to a concept of Europe that includes jurisdictions like the United Kingdom and omits jurisdictions like Russia and Turkey.

Specific to economic impact modelling, European jurisdictions were included based on data available from Sensor Tower, a mobile-specialised market intelligence platform from which Nordicity sourced key data points.

### Accordingly, base European modelling includes:

Austria, Belgium, Bulgaria, Croatia, Cyprus, Czechia, Denmark, Estonia, Finland, France, Georgia, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Malta, Netherlands, Norway, Poland, Portugal, Romania, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Ukraine, United Kingdom

Some analysis, where indicated, removes data related to the United Kingdom.

Nordicity also provided modelling for the European Single Market, which includes countries that are officially recognised by the European Union to be part of the single market agreement.

### European Single Market modelling includes:

Austria, Belgium, Bulgaria, Croatia, Cyprus, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Malta, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, Switzerland



Norway participates in the EU Single Market via the European Economic Area (EEA) Agreement.



Switzerland has partial access to the EU Single Market via sectoral bilateral agreements.

Other EU Single Market countries, specifically Iceland, Liechtenstein and Luxembourg, were not included as they did not have applicable economic impact data.

# Methodology

## Markets vs Industries

This report describes the operation of mobile game markets and industries. The distinction between the two represents a vital difference between understanding the economic activity from the perspectives of consumers and the perspective of developers/publishers, respectively.

Mobile game markets characterise consumer behaviour and app-based spending, while the mobile game industry connotes a collection of companies developing and monetising mobile games. The latter figures into this report more prominently because it considers net revenue (after platform fees, user acquisition (UA) costs, and other cost of goods), corporate expenditures, employment, and other operational needs that drive key economic impacts such as gross value added (GVA).

## Defining Economic Impact

It should be noted that revenue by itself is not the basis of measuring economic impact. Rather, employment, capital expenditures, operating profits, and expenses related to jurisdiction-specific user acquisition and service provisions on the part of mobile game companies all contribute to their jurisdiction's national economy.

For the purposes of this report, Nordicity modelled the impact as a function of expenditure. This approach focuses on in-country spending and excludes the impact of operating profits. This approach produces a more conservative, but also more tangible, economic impact assessment.

Each jurisdictional impact assessment considers employment and spending within the jurisdiction itself (headcounts specific to offices in that country, spending on UA within the same jurisdiction, and additional expenses incurred in-region).

Unless otherwise stated, figures in the underlying analysis were calculated in US dollars and converted into euros using the average USD/EUR exchange rate for 2025, which was 0.886.

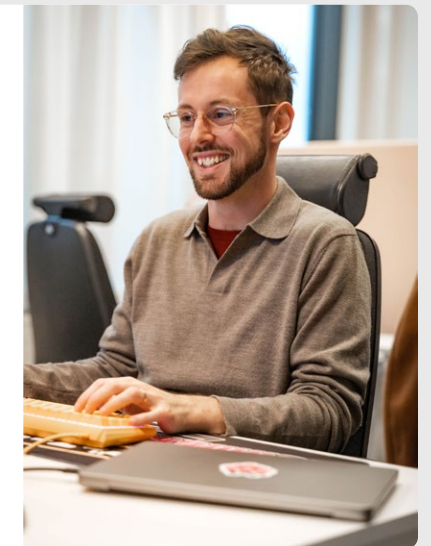


### Economic impact across jurisdictions is based on measures of employment and gross value added (GVA):

- Employment is measured as a function of full-time equivalents (FTEs), which standardises labour effort to a metric representing an employee's 40-hour week (thus harmonising measures of employment across full-time, part-time, contract and temporary workers).
- GVA refers to net economic contribution of the mobile game companies, comprised in the analysis, based on employment and other spending.

### It also measures these as direct, indirect and induced impacts:

- **Direct impacts:** jobs and economic activity directly generated as a function of mobile game companies' employment and productive capacities.
- **Indirect impacts:** jobs and economic activity generated by mobile game companies' purchases of supplies and services from other industries.
- **Induced impacts:** jobs and economic activity generated by direct and indirect re-spending of labour income in a country's wider economy.



# Methodology

## Economic Impact Modelling

Nordicity conducted the economic impact analysis contained within this report using its proprietary MyEIA™ impact modelling tool and methodology. This modelling approach incorporates jurisdiction-specific input-output data (sourced from official government sources such as statistics, labour or economic offices and departments) as well as industry-specific wage averages and cost breakdowns to estimate direct, indirect and induced economic impacts from industry activity, specifically as a measure of additional labour and GVA contributions for a given economy.

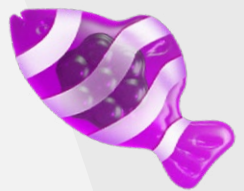
Nordicity's modelling was supplemented by European mobile game industry data exported from Sensor Tower. Sensor Tower provides the most comprehensive market intelligence platform as it pertains to the global mobile games ecosystem, with key data points such as per-app downloads, revenue, studio location, and market share, among others.

### **Nordicity exported data from Sensor Tower based on the following criteria:**

- Data relates to a one-year period from January 1st 2025 to December 31st 2025;
- Unified data including both the Google Play Store and the Apple App Store;
- Only includes downloads and revenue from apps tagged as 'games';
- App studios must be designated as being located within one of 32 available European markets;
- Limited to studios with \$10,000 or more in reported gross revenue within the one-year period.

Nordicity manually validated the exported data set by using government sources (for example, the UK Companies House, Sweden's Bolagsverket, Germany's Handelsregister, etc.) and publicly available data (verifying company websites, LinkedIn, press releases, etc.) to ensure that studios were still in operation, to approximate headcounts and to check for misattributed jurisdictions. As a frequent example of the latter, many studios still based in Russia set their company location to other jurisdictions, commonly in Cyprus. These studios were excluded from the analysis accordingly.

Overall, Nordicity's validated data set contained over 1,170 fully dedicated mobile games companies and subsidiaries as attributed by Sensor Tower, across 32 European jurisdictions. While there are more than 1,170 mobile games companies in Europe, Nordicity's modelling limits the inclusion criteria to validated companies that reportedly, via Sensor Tower, made more than \$10,000 in revenue from their mobile games.



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