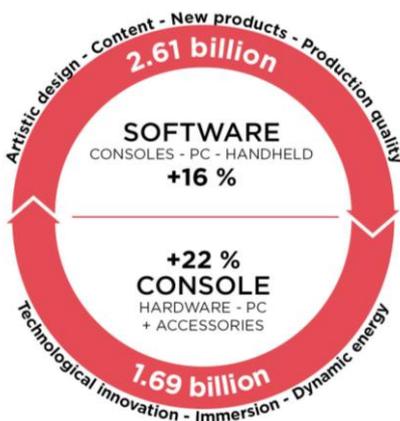




The video game market grew 18% in France and posted record sales of 4.3 billion* euros

Paris, 26th February 2018 - The Union of Video Game Publishers (SELL) presents the new edition of Essential Video Game News. It contains a complete report on the market which has generated excellent results and confirmed its incredible vitality. This energy can be explained in particular by the complementary nature of the Hardware and Software offers and the specific nature of a sector where technological innovation and artistic creativity combine. These connections create a virtuous circle which benefits the entire market.



Video gaming's global turnover also involves sales of consoles, PC Gaming and accessories which generated 1.693 billion* euros (22%*) and sales of console games, PC games and handheld games for 2.61 billion* (+16%*).

"This performance demonstrates all the potential and wealth of our industry which is bolstered by the right balance between technological innovation, content creation and the ability to offer services in phase with player expectations."

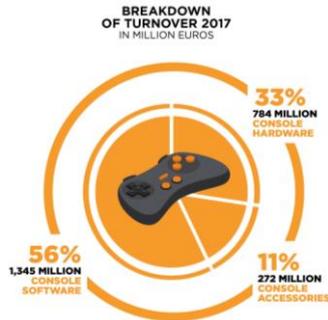
Julie Chalmette, SELL Chairwoman

For 2017, this record growth is buoyed by the three ecosystems that make up the industry: consoles, PC Gaming and handheld devices.





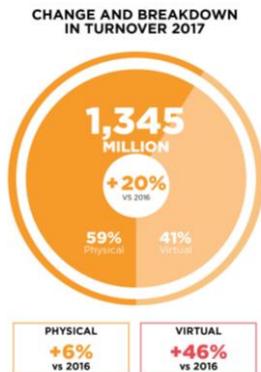
The console ecosystem stimulated the growth of the video game market in 2017



A genuine driver for the sector, the console ecosystem generated 56%* of market value and grew 23%* to achieve 2.041* billion euros in sales.

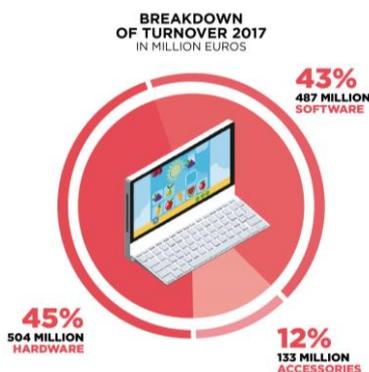
The launches of the Nintendo Switch and the Xbox One X, and the sustained performance of the PlayStation 4 and PlayStation 4 Pro have lifted console hardware to its highest height since 2010 with sales of 748 million* euros and an unprecedented 31%* growth in value compared to 2016.

The arrival of these new gaming devices was supported by an enriched range of console accessories to improve gaming experience with peripherals that are increasingly immersive, at the forefront of technology. **This segment posted sales of 272 million* euros (excluding pre-paid cards) and growth of 23%*.**



Finally, console software, at the very centre of creating unique gaming worlds and brand new experiences, posted overall growth of 20%* and also did very well in terms of both physical sales (+6%*) and virtual sales (+46%*). The console gaming sector therefore represents 31%* of total video game market sales in France, a result of enriching and extending the catalogue of games and the success of flagship licences.

PC Gaming: continued growth driven by gamer demands



The PC Gaming ecosystem, which had exceeded one billion euros in 2016, registered 6%* growth in 2017 to reach 1.12 billion* euros.

All of the segments are growing but particularly sales for PC Gaming (+10%*) and accessories (+20%*). Growing gamer demands in terms of how they play has not escaped the manufacturers' attention, who are continuing to develop ranges dedicated to gaming.



The ecosystem has also witnessed a slight drop in software (-1%*) impacted by a fall in sales of physical PC games (-14%*) and the stability of sales of virtual games which represent 95%* of sales of PC Gaming software.

Julie Chalmette concludes: "We are delighted with our industry's buoyant energy and historic results. And we firmly believe that 2018 will be just as stimulating and exciting. "



GAMETRACK

App Annie

New panels: better understanding and measuring all the diversity of gaming

An operator and witness to the changing video game industry, for over twenty years SELL has provided the keys to understanding the market. For the first time, the annual report has been produced using new panels to help better understand the market on a European scale and provide a sharper vision of the digital market.

Launched in 2013, this endeavour is the result of a European project run by the ISFE (Interactive Software Federation of Europe) with around a hundred partners, with the aim of better measuring the diversity and complementary characteristics of the different ecosystems that make up the video game industry. Called GSD (Game Sales Data), this new panel also unifies sales data collected from different territories and regroups it, whether it be virtual or physical, within one unique tool available to professional organisations, distributors and publishers on the panel. To date, GSD is the only data source for game downloads based on real sales.

The estimations in Essential Video Game News come from a collaboration between three organisations: GSD - Games Sales Data for the Physical market, GSD and GameTrack for the Digital market and App Annie Intelligence and GameTrack for Handheld data. Today, this means we can analyse the sector's activity precisely in the three ecosystems.

France is the first country to communicate its official market data through these new panels. Other countries and regions will follow in the coming months: Belgium, the Netherlands, Spain, Portugal, Italy, Nordic countries, then Austria, Germany, Switzerland, Poland mid-2018 and the United Kingdom in early 2019.



**Source: SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017.
GSD (Game Sales Data): for the Physical market
GSD and GameTrack: for the Digital market.
App Annie and GameTrack: for Handheld data.*

***2016 sales 3.64 billion euros*

*Hardware: console
Software: game*



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About Essential Video Game News

Launched in February 2014, Essential Video Game News is produced by the Union of Video Game Publishers (SELL). A reflection of the French video game industry in terms of the market and consumption, updates will be available three times a year.

About SELL – Union of Video Game Publishers – www.sell.fr

SELL acts as the national representative of video game and leisure software publishers: general public software that is not for office use. Today it has twenty-two members representing over 70% of the sector's turnover. SELL promotes and defends the collective interests of video game publishers in different domains where their products are used and within the different professional, economic or legal boundaries concerning them, contributing to the market's structure (ratings, promotion of the profession, anti-piracy, press, etc.) and its recognition by all professionals, public authorities and consumers. SELL supports the PEGI European standard, a rating system for video game content that provides reliable information that is easy to understand on the game's packaging. SELL represents the digital leisure industry's commitment to responsibility. The Chairwoman of SELL is Julie Chalmette and the General Delegate is Emmanuel Martin.

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