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FEBRUARY 2018

ESSENTIAL
VIDEO GAME NEWS

2017 FIGURES - THE FRENCH VIDEO GAME MARKET

S.E.L.L.
SYNDICAT DES EDITEURS DE LOGICIELS DE LOISIRS

Essential Video Game News is produced by the Union of Video Game Publishers (SELL).
It reflects the market, consumption and use of the French video gaming industry.

FEBRUARY 2018

ESSENTIAL
VIDEO GAME NEWS

Energised by a constantly renewed offer, the video game industry confirmed the trend already observed in 2016. The market generated historic sales of 4.3 billion euros* in 2017 and record growth of 18%.**

Our sector is characterised by the complementary nature of technological innovations, content creation and gamer services. Overall turnover is focused around sales of consoles, PC gaming and accessories which stood at 1.693 billion euros* (+22%*) and sales of console games, PC games and mobile games, which posted 2.61 billion euros* turnover (+16%*).
Developer innovation and creativity and also the appetite of gamers and the diversification of gaming modes have had a very positive effect on the whole industry. For 2017, growth is generalised over the three ecosystems: consoles, PCs and mobile devices.

With turnover of 2.4 billion euros* representing 56% of the total market value, the console ecosystem is the industry's driving force. 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 sales to their highest level since 2010 with turnover of 748 million euros* and 31%* growth compared to 2016. The arrival of these new consoles was accompanied by the development of console accessory ranges helping enrich the gaming experience that is always more immersive and technologically ground-breaking. Console game sales posted 20%* growth and culminated at 1.354 billion euros*. The growth of this segment is the same for the digital (+46%*) and physical (+6.6%*) markets. The excellent performance of our market

- **Hardware:** console
- **Software:** game
- **Console ecosystem:** hardware + software (physical and digital) + accessories
- **PC Gaming ecosystem:** hardware + software (physical and digital) + accessories
- **Mobile Ecosystem:** mobile video games

****Source:** SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017.*
***2016 turnover: 3.64 billion euros*

once again demonstrates our industry's virtuous dynamic between technological innovations and production quality.

A stakeholder 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, this annual report has been produced using our new panel, the result of a collaboration between industry operators, to help better understand the market on a European scale and provide a sharper vision of the digital market. Under the impetus of the ISFE (Interactive Software Federation of Europe), the industry has created a new panel called "GSD" (Game Sales Data) with the aim of better measuring the diversity and complementary characteristics of the different ecosystems that make up the video game industry. The estimations in this newsletter are the result of a collaboration between three organisations (GSD, GameTrack and App Annie Intelligence) for precise analysis of our sector's activity.

We are delighted with our industry's buoyant energy and historic results. And we firmly believe that 2018 will be just as stimulating, thrilling and exciting.

Julie Chalmette
SELL Chairwoman

> “For 2017, growth is generalised over the three ecosystems: consoles, PCs and mobile devices.”

NEW PANELS

Estimations for 2017 turnover are the result of collaboration between three organisations providing SELL their data, for a precise analysis of the sector's activity.

- GSD: for the physical market
- GSD and GameTrack: for the digital market
- App Annie and GameTrack: for the mobile market.

ABOUT GSD (GAME SALES DATA)

Launched in 2013, the GSD project 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 unifying data collection from different territories and regrouping this data (physical or digital) within one tool available to trade associations, distributors and video game publishers participating in the panel. France is the first country to communicate its official market data through GSD data. Other countries and regions will follow over the coming months: Belgium and the Netherlands, Spain and Portugal, Italy, Nordic countries, then Austria, Germany, Switzerland and Poland mid-2018 and the United Kingdom in early 2019.

Methodology:

- Distributor panel: the data on video game sales is sent by distributors from each country on a weekly basis. The data is standardised, combined, anonymised and extrapolated to recreate the entire market. To guarantee a reliable and standardised product database, the information on catalogues is directly supplied by the publishers. Furthermore, the publishers provide data to hone the extrapolation calculation models to create a sharper vision of markets that are not completely covered by the distributor panel.

- Digital panel: digital data sales cover complete game sales on the PlayStation Network (PSN), Xbox Live (XBL) and PC sales networks. The sales figures are sent each week directly by the video game publishers taking part in the project and therefore do not require any extrapolation. GSD is the only data source for complete game downloads based on real sales data.

The panel is operated by b2boost.

ABOUT GAMETRACK

GameTrack is an additional project set up in 2011 and built around a consumer panel operated by Ipsos for the ISFE. GameTrack data comes from monthly survey data published quarterly. The data analyses the demographics of European gamers, their buying behaviour across all platforms and helps generate an in-depth view of their gaming habits and uses. The countries covered are France, the UK, Germany and Spain and also the United States and Russia. GameTrack supports the GSD project by providing a more global vision of the markets in which it operates.

Methodology:

GameTrack data is collated quarterly from two surveys:

- an offline survey carried out annually on a sample 1,000 people aged 15 and over. This survey is used to balance answers from a more detailed online survey;
- an online survey, carried out monthly with a sample of (the same) 3,000 people per quarter, aged 6 to 64.

ABOUT APP ANNIE

App Annie analyses data from app stores (scores, rankings, comments, etc.) and combined anonymised transactional data from over a million applications. With this data, App Annie produces estimations about app downloads and revenue performance.

CHAPTER 1

THE FRENCH VIDEO GAME MARKET

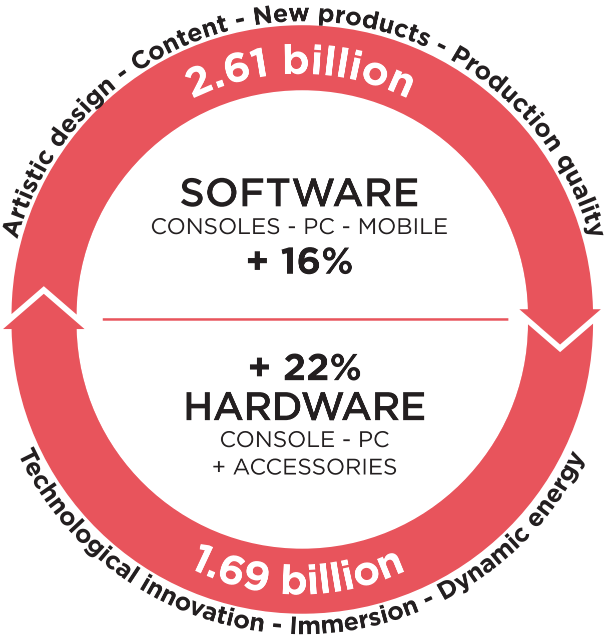
MARKET OVERVIEW

2017: rich in innovations

Hardware and software offers are in phase, helping to generate historic sales.

A sector characterised by the complementary nature of technological innovations, content creation and gamer services.

Performance that demonstrates the industry's virtuous dynamic between technological innovations and production quality.

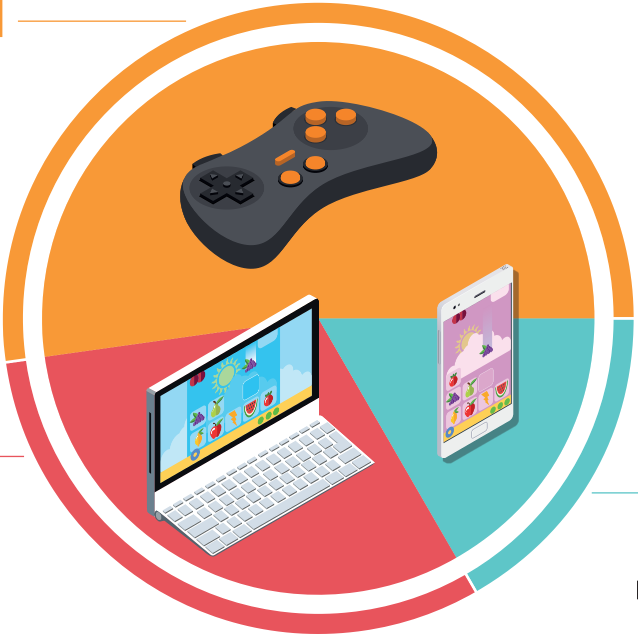


***Source:** SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017.*

2017 MARKET REPORT

TURNOVER

4.3 **BILLION EUROS***



CONSOLE ECOSYSTEM
2,401
MILLION EUROS

PC GAMING ECOSYSTEM
1,124
MILLION EUROS

MOBILE ECOSYSTEM
778
MILLION EUROS

Source: *SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017.*
**2016 turnover: 3.64 billion euros*

GROWTH
IN SALES

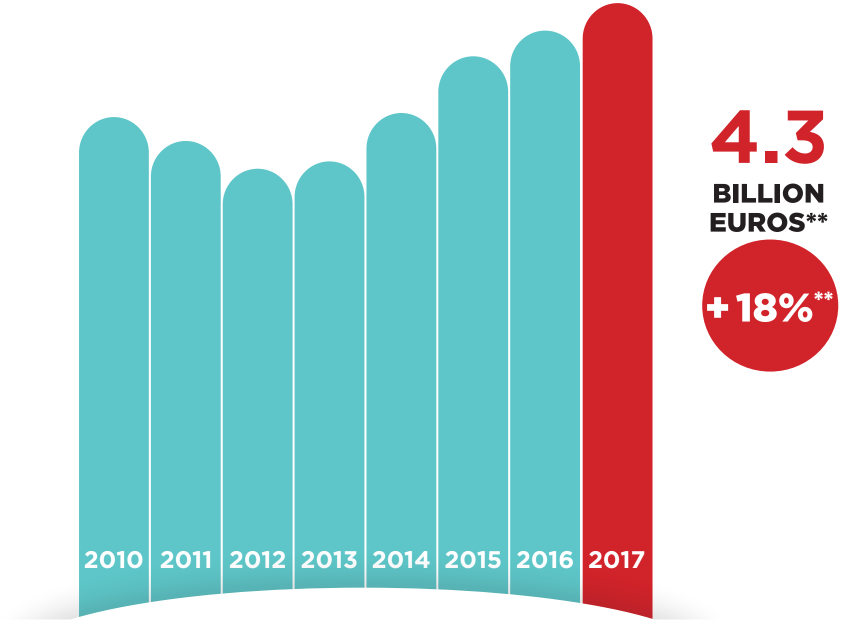
*OVERALL MARKET

+18% VS 2016

CONSOLE ECOSYSTEM
+ 23%
vs 2016

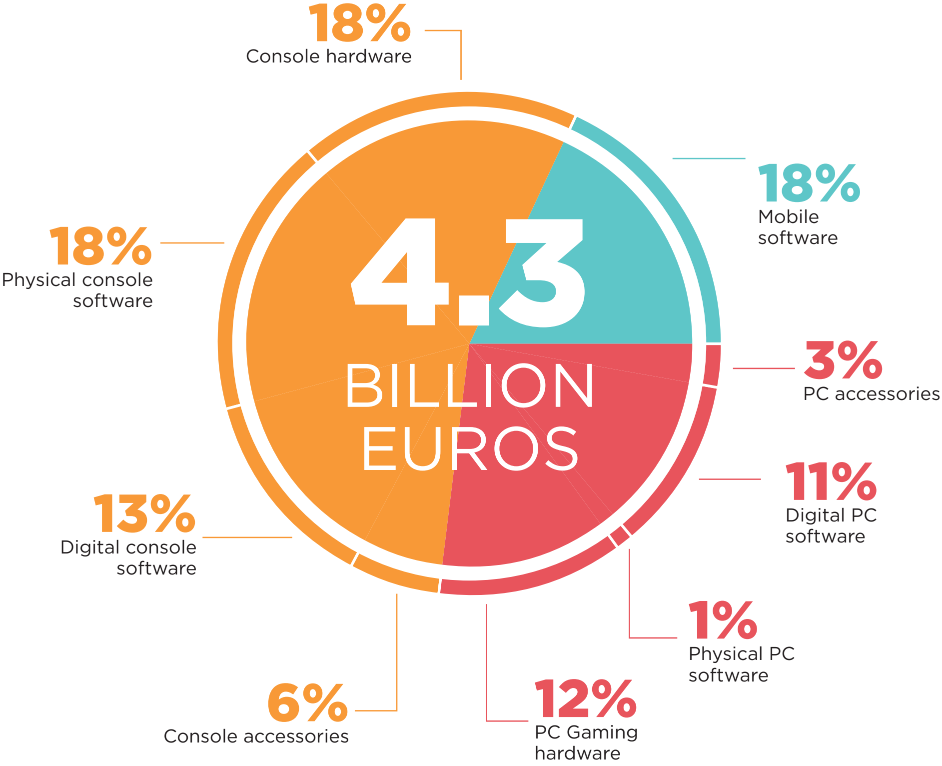
PC GAMING ECOSYSTEM
+ 6%
vs 2016

MOBILE ECOSYSTEM
+ 22%
vs 2016



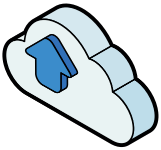
Source: *SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017.*
**Ecosystems: Console + PC + Mobile, physical + digital **2016 turnover: 3.64 billion euros*

CLOSE-UP: SEGMENTS
MARKET SHARE

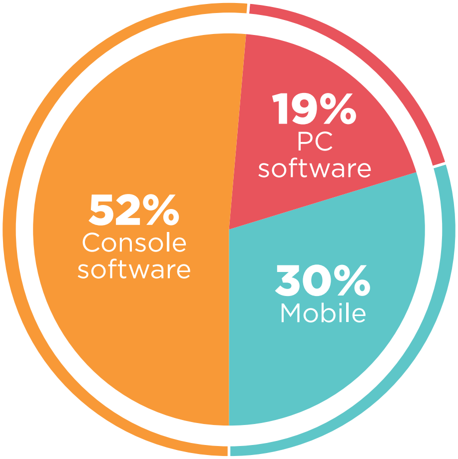


Source: *SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017.*

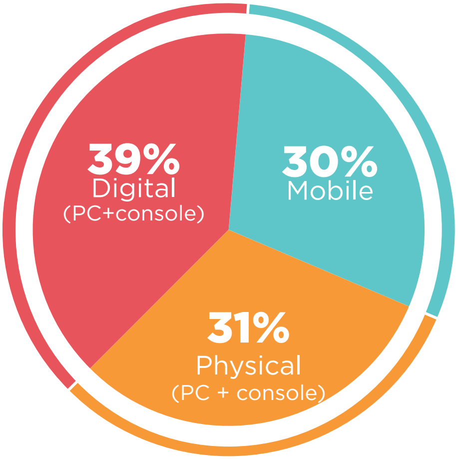
CLOSE-UP:
SOFTWARE



BREAKDOWN OF TURNOVER BY PLATFORM



BREAKDOWN OF TURNOVER

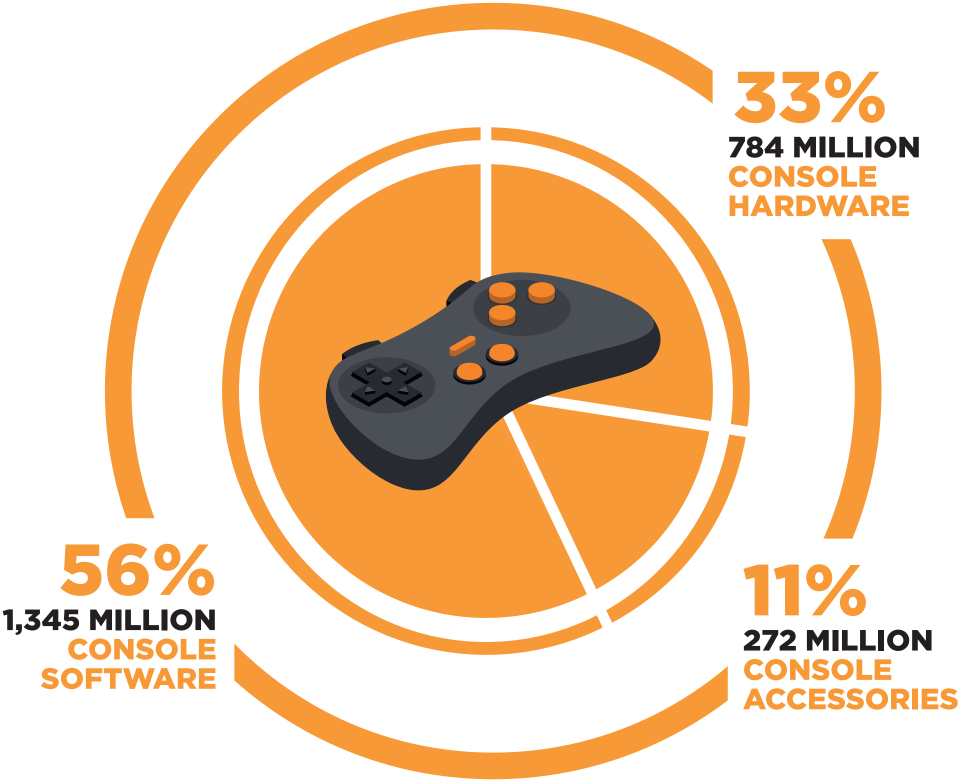


Source: *SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017.*

CONSOLE ECOSYSTEM

BREAKDOWN OF 2017 TURNOVER

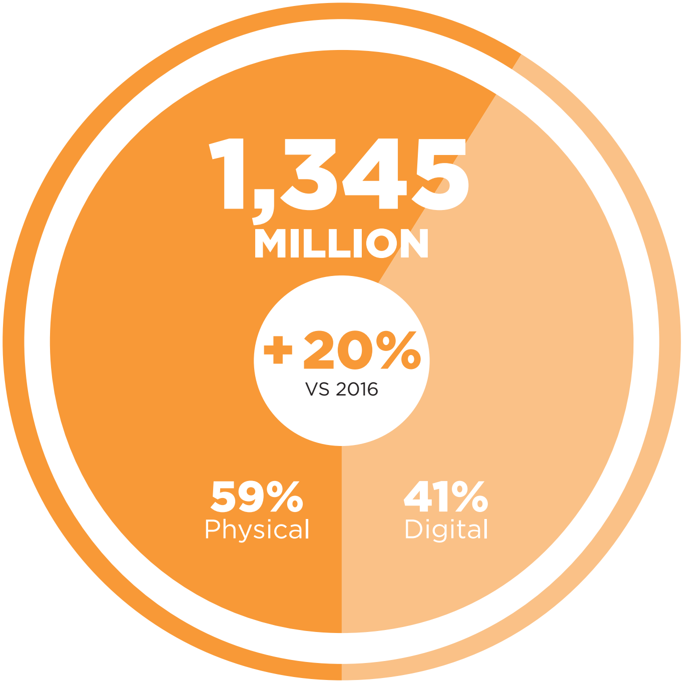
IN EUROS



Source: *SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017.*

CONSOLE ECOSYSTEM
SOFTWARE

CHANGE AND BREAKDOWN OF 2017 TURNOVER
IN EUROS



PHYSICAL
+ 6%
vs 2016

DIGITAL
+ 46%
vs 2016

Source: *SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017.*

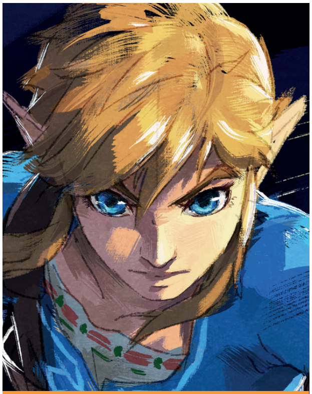
TOP 20 GAMES IN 2017

ALL PLATFORMS IN VALUE

(physical market)

1 **FIFA 18**
Electronic Arts
€77,561,888

2 **Call of Duty: WWII**
Activision Blizzard
€58,469,032



3 **The Legend Of Zelda: Breath of The Wild**
Nintendo
€31,738,446

4	Assassin's Creed Origins	Ubisoft	€27,943,398
5	Mario Kart 8 Deluxe	Nintendo	€26,358,197
6	Super Mario Odyssey	Nintendo	€20,023,818
7	Horizon Zero Dawn	Sony Interactive Entertainment	€15,966,792
8	Grand Theft Auto V	Take-Two Interactive	€15,343,847
9	Star Wars Battlefront II	Electronic Arts	€14,270,148
10	Tom Clancy's Ghost Recon Wildlands	Ubisoft	€13,817,087
11	Destiny 2	Activision Blizzard	€12,712,294
12	Splatoon 2	Nintendo	€12,525,956
13	FIFA 17	Electronic Arts	€12,364,472
14	Call of Duty: Infinite Warfare	Activision Blizzard	€11,991,126
15	Gran Turismo Sport	Sony Interactive Entertainment	€10,919,838
16	Crash Bandicoot N.Sane Trilogy	Activision Blizzard	€10,771,845
17	1-2-Switch	Nintendo	€8,683,406
18	NBA 2K18	Take-Two Interactive	€8,185,533
19	Overwatch	Activision Blizzard	€7,654,097
20	Resident Evil 7: Biohazard	Capcom	€7,636,395

Source: *Source: SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017. Excluding bundles.*

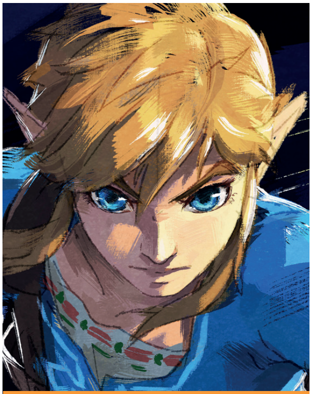
TOP 20 GAMES IN 2017

ALL PLATFORMS IN VOLUME

(physical market)

1 FIFA 18
Electronic Arts
1,364,000

2 Call of Duty: WWII
Activision Blizzard
1,020,201



3 The Legend Of Zelda: Breath of The Wild
Nintendo
511,191

4	Mario Kart 8 Deluxe	Nintendo	501,515
5	Assassin's Creed Origins	Ubisoft	453,609
6	Super Mario Odyssey	Nintendo	399,721
7	Crash Bandicoot N.Sane Trilogy	Activision Blizzard	301,285
8	Grand Theft Auto V	Take-Two Interactive	293,851
9	Call of Duty: Infinite Warfare	Activision Blizzard	268,534
10	Horizon Zero Dawn	Sony Interactive Entertainment	255,410
11	Star Wars Battlefront II	Electronic Arts	247,788
12	Destiny 2	Activision Blizzard	233,685
13	Splatoon 2	Nintendo	230,826
14	Tom Clancy's Ghost Recon Wildlands	Ubisoft	220,947
15	FIFA 17	Electronic Arts	220,267
16	Gran Turismo Sport	Sony Interactive Entertainment	195,713
17	Pokémon Ultra Sun	Nintendo	192,904
18	Tom Clancy's Rainbow Six: Siege	Ubisoft	191,522
19	1-2-Switch	Nintendo	190,996
20	Pokémon Ultra Moon	Nintendo	166,369

Source: *SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017. Excluding bundles.*

TOP 20 GAMES IN 2017

BY PLATFORM, IN VALUE

(physical market)

1	PS4	**FIFA 18**	Electronic Arts	**€55,563,896**
2	PS4	**Call of Duty: WWII**	Activision Blizzard	**€46,550,580**
3	Switch	**Mario Kart 8 Deluxe**	Nintendo	**€26,358,197**
4	Switch	**The Legend Of Zelda: Breath of The Wild**	Nintendo	**€23,932,475**
5	Switch	**Super Mario Odyssey**	Nintendo	**€20,023,818**
6	PS4	**Horizon Zero Dawn**	Sony Interactive Entertainment	**€13,880,038**
7	PS4	**Assassin's Creed Origins**	Ubisoft	**€12,874,673**
8	PS4	**Grand Theft Auto V**	Take-Two Interactive	**€12,663,631**
9	Switch	**Splatoon 2**	Nintendo	**€12,525,956**
10	Xbox One	**FIFA 18**	Electronic Arts	**€11,847,201**
11	PS4	**Crash Bandicoot N.Sane Trilogy**	Activision Blizzard	**€10,771,845**
12	PS4	**Star Wars Battlefront II**	Electronic Arts	**€10,616,008**
13	Xbox One	**Call of Duty: WWII**	Activision Blizzard	**€10,233,621**
14	PS4	**Gran Turismo Sport**	Sony Interactive Entertainment	**€9,168,647**
15	PS4	**Destiny 2**	Activision Blizzard	**€9,033,252**
16	PS4	**FIFA 17**	Electronic Arts	**€8,871,327**
17	Switch	**1-2-Switch**	Nintendo	**€8,683,406**
18	PS4	**Tom Clancy's Ghost Recon Wildlands**	Ubisoft	**€8,053,338**
19	Switch	**Mario + The Raving Rabbids Kingdom Battle**	Ubisoft	**€7,307,774**
20	Wii U	**The Legend Of Zelda: Breath of The Wild**	Nintendo	**€6,782,095**

Source: *Source: SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017. Excluding bundles.*

TOP 20 GAMES IN 2017

BY PLATFORM, IN VOLUME

(physical market)

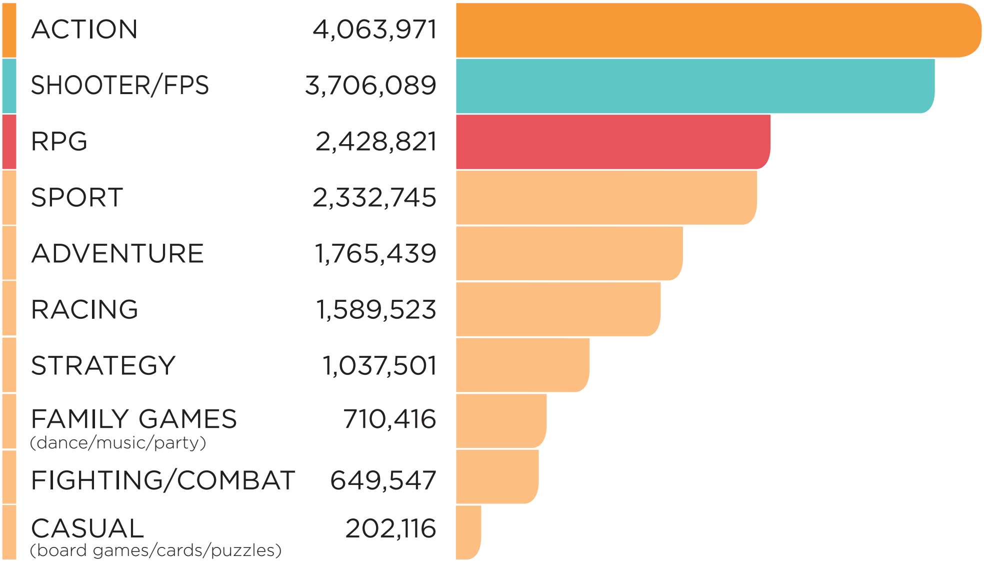
1	PS4	**FIFA 18**	Electronic Arts	**971,885**
2	PS4	**Call of Duty: WWII**	Activision Blizzard	**824,386**
3	Switch	**Mario Kart 8 Deluxe**	Nintendo	**501,515**
4	Switch	**Super Mario Odyssey**	Nintendo	**399,721**
5	Switch	**The Legend Of Zelda: Breath of The Wild**	Nintendo	**392,207**
6	PS4	**Crash Bandicoot N.Sane Trilogy**	Activision Blizzard	**301,285**
7	PS4	**Grand Theft Auto V**	Take-Two Interactive	**233,765**
8	Switch	**Splatoon 2**	Nintendo	**230,826**
9	PS4	**Horizon Zero Dawn**	Sony Interactive Entertainment	**227,471**
10	PS4	**Assassin's Creed Origins**	Ubisoft	**225,220**
11	Xbox One	**FIFA 18**	Electronic Arts	**205,076**
12	Switch	**1-2-Switch**	Nintendo	**190,996**
13	PS4	**Star Wars Battlefront II**	Electronic Arts	**187,779**
14	PS4	**Destiny 2**	Activision Blizzard	**180,892**
15	Xbox One	**Call of Duty: WWII**	Activision Blizzard	**179,694**
16	3DS	**Pokémon Ultra Sun**	Nintendo	**178,325**
17	PS4	**Gran Turismo Sport**	Sony Interactive Entertainment	**174,948**
18	3DS	**Pokémon Ultra Moon**	Nintendo	**153,138**
19	PS4	**Tom Clancy's Rainbow Six: Siege**	Ubisoft	**147,124**
20	PS4	**FIFA 17**	Electronic Arts	**146,566**

***Source:** Source: SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017. Excluding bundles.*

TOP 10

TYPES OF VIDEO GAMES BOUGHT IN 2017 IN VOLUME

(physical market)



ACTION	4,063,971
SHOOTER/FPS	3,706,089
RPG	2,428,821
SPORT	2,332,745
ADVENTURE	1,765,439
RACING	1,589,523
STRATEGY	1,037,501
FAMILY GAMES (dance/music/party)	710,416
FIGHTING/COMBAT	649,547
CASUAL (board games/cards/puzzles)	202,116

Source: *SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017.*

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SYNDICAT DES EDITEURS DE LOGICIELS DE LOISIRS

TOP WEEKLY SALES

Every Monday, discover the top video game sales in France

ON THE WEBSITE

SELL.FR

ON OUR SOCIAL MEDIA

@SELL_JeuxVideo	@SELL.JeuxVideo	@SELL_JeuxVideo	SELL TV

OR SUBSCRIBE TO OUR DEDICATED NEWSLETTER

CONSOLE ECOSYSTEM

HARDWARE

GROWTH IN SALES FOR 2017

784

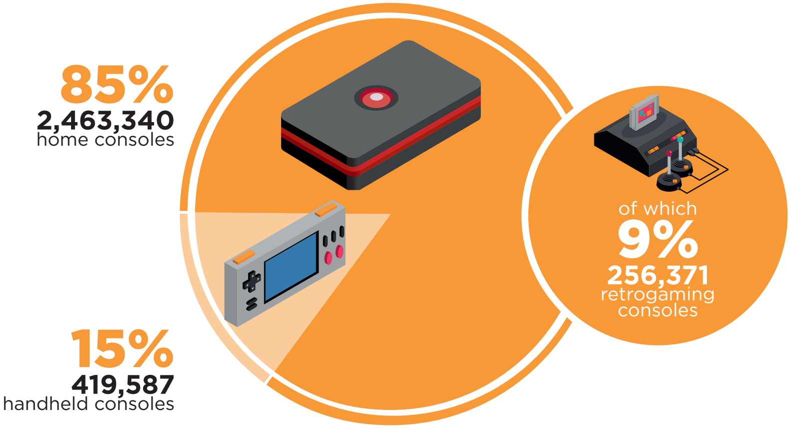
MILLION EUROS

+31%
VS 2016

SHARE OF SALES

FOR CONSOLES IN 2017

(IN VOLUME)



Source: *SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017.*

CONSOLE ECOSYSTEM

ACCESSORIES

GROWTH IN SALES FOR 2017

272
MILLION EUROS

+23%
VS 2016

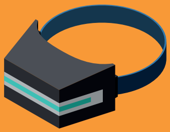
TOP 3

CONSOLE ACCESSORIES*

IN VALUE

① **CONTROLLERS**

② **VIRTUAL REALITY**

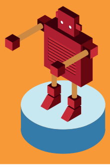


③ **AUDIO**
(gaming headsets)

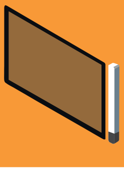
IN VOLUME

① **CONTROLLERS**

② **TOYS TO LIFE**



③ **ACCESSORIES**
(styluses, protective gear, etc.)

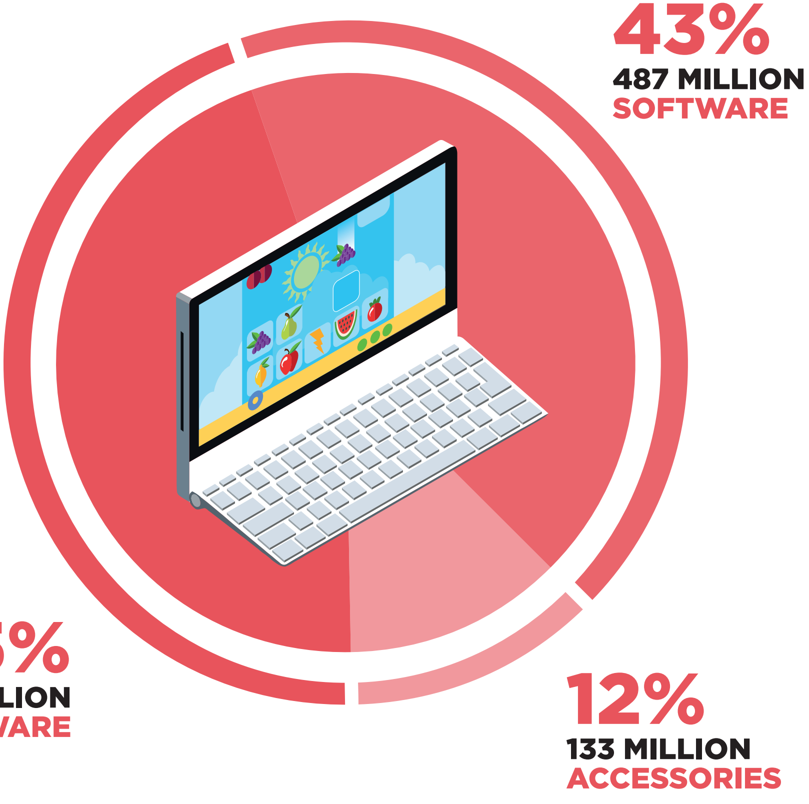


Source: *SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017.*
**excluding pre-paid cards.*

PC GAMING ECOSYSTEM

BREAKDOWN OF 2017 TURNOVER

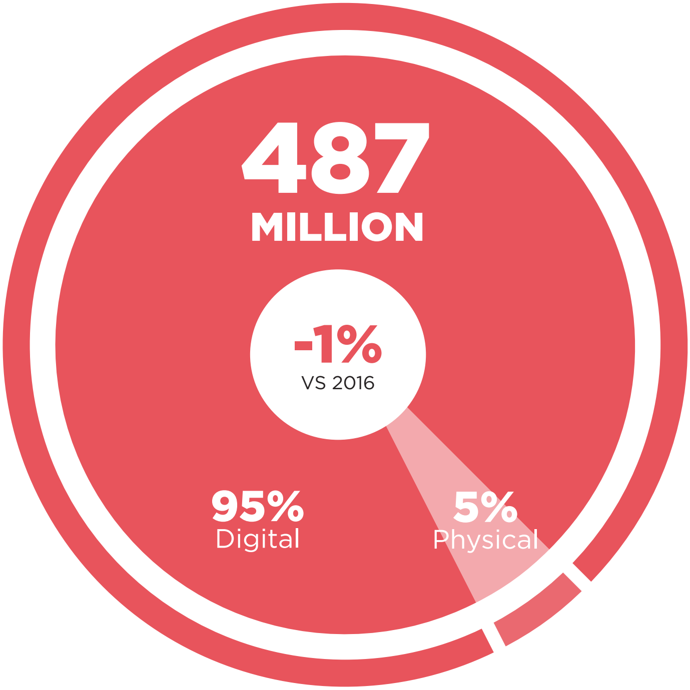
IN EUROS



***Source:** SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017.*

PC GAMING ECOSYSTEM
SOFTWARE

CHANGE AND BREAKDOWN OF 2017 TURNOVER
IN EUROS



PHYSICAL
-14%
vs 2016

DIGITAL
+ 0%
vs 2016

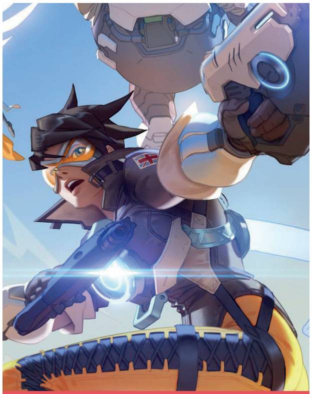
Source: *SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017.*

TOP 20 GAMES IN 2017

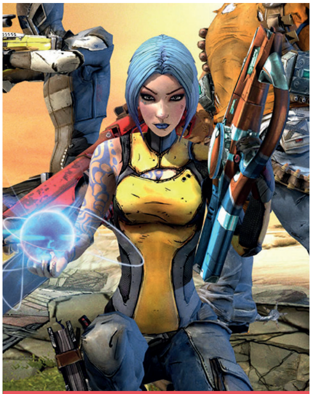
PC IN VOLUME

(physical market)

1 **The Sims 4**
Electronic Arts
60,652



2 **Overwatch**
Activision Blizzard
41,599

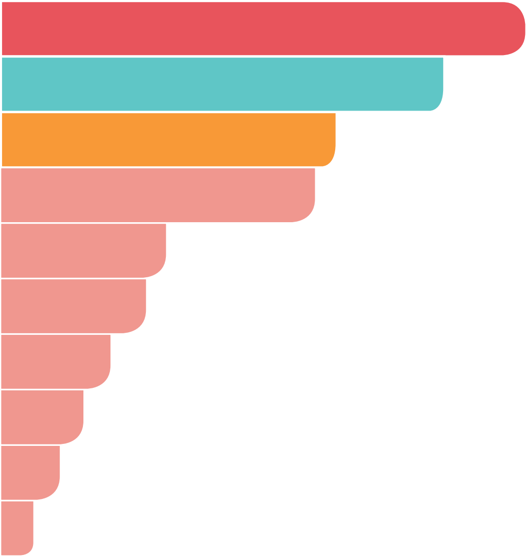


3 **Borderlands 2**
Take-Two Interactive
26,328

4	The Sims 4: Cats and Dogs	Electronic Arts	19,840
5	Call of Duty: WWII	Activision	19,201
6	Farming Simulator 17	Focus Home Interactive	18,421
7	Call of Duty: Modern Warfare 3	Activision	15,654
8	Football Manager 2018	Sega	14,609
9	Star Wars Battlefront II	Electronic Arts	13,664
10	The Hunter: Primal	Just For Games	12,829
11	The Sims 4: City Living	Electronic Arts	11,406
12	Battlefield 1	Electronic Arts	11,225
13	Grand Theft Auto V	Take-Two Interactive	10,026
14	FIFA 18	Electronic Arts	9,568
15	World of Warcraft: Legion	Activision Blizzard	9,528
16	Syberia 3	Just For Games	8,605
17	South Park: The Stick of Truth	Ubisoft	7,629
18	Sid Meier’s Civilization VI	Take-Two Interactive	7,211
19	The Elder Scrolls V: Skyrim	Bethesda Softworks	7,174
20	Mass Effect: Andromeda	Electronic Arts	7,033

Source: *SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017.*

TOP 10
TYPES OF PC VIDEO GAMES BOUGHT IN 2017 IN VOLUME
(physical market)



STRATEGY	265,582
SHOOTER/FPS	217,900
ACTION	86,796
RPG	82,776
CASUAL (board games/cards/puzzles)	50,630
SPORT	49,567
ADVENTURE	41,044
MISCELLANEOUS	31,776
RACING	18,530
FIGHTING/COMBAT	4,458

Source: *SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017.*

PC GAMING ECOSYSTEM

HARDWARE*

GROWTH OF 2017 TURNOVER

+10% VS 2016

504 MILLION EUROS

PC GAMING ECOSYSTEM

ACCESSORIES*

GROWTH OF 2017 TURNOVER

+20% VS 2016

133 MILLION EUROS

__Source:__ SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017.

**Hardware: sales of PCs fitted with high-performance graphics card / Accessories: mice, keyboards, screens for PC gaming.*

TOP 10 GAMES IN 2017
ON MOBILE, IN VALUE

1 Clash Royale
Supercell

2 Dragon Ball Z: Dokkan Battle
Bandai Namco Entertainment

3 Clash of Clans
Supercell

4 Candy Crush Saga
King

5 Summoners War
Com2uS

6 Candy Crush Soda Saga
King

7 Gardenscapes: New Acres
Playrix Games

8 Pokémon GO
Niantic, Inc.

9 Lords Mobile
IGG.com

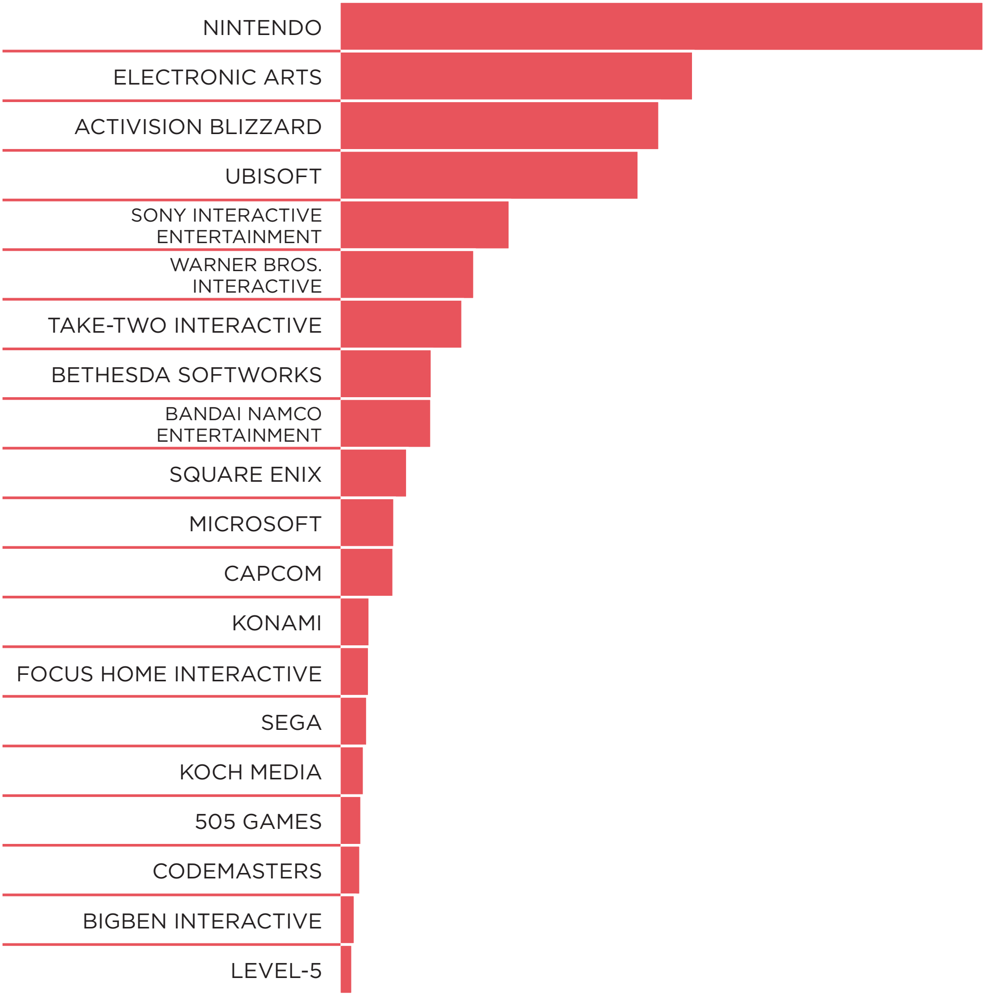
10 Marvel Contest of Champions
SaddanApps

Source: *App Annie Intelligence/GameTrack.*

TOP 20 PUBLISHERS

SOFTWARE, IN VOLUME

(physical market)

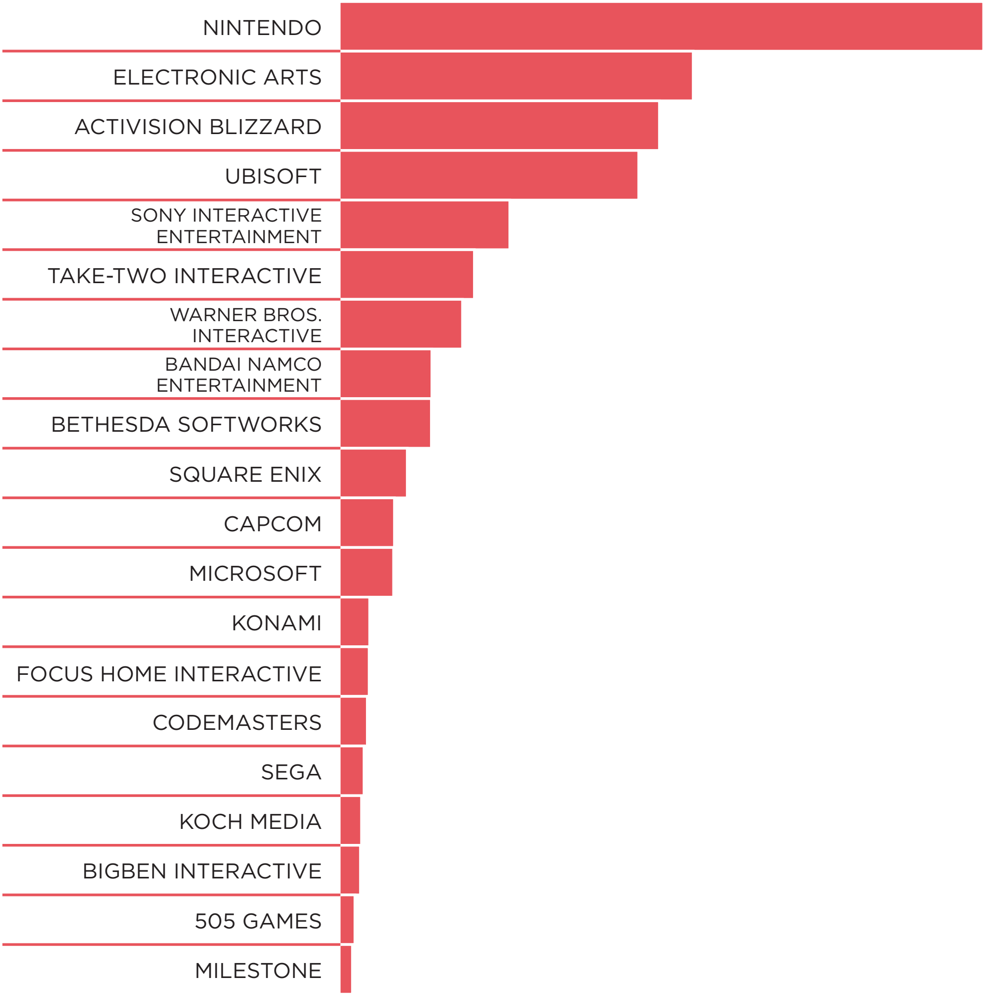


Source: *SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017.*

TOP 20 PUBLISHERS

SOFTWARE, IN VALUE

(physical market)



Source: *SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017.*

CHAPTER 2

PROFILES OF FRENCH GAMERS

About the "French public and Video gaming" survey
The "French public and Video gaming" survey is carried out by GfK for SELL with the aim of measuring and understanding video game use and purchases in France. For this survey, a panel of 1,023 people aged 10 to 65 were interviewed in October 2017.

FRENCH PEOPLE AND VIDEO GAMES

77%

OF FRENCH PEOPLE consider video gaming a leisure activity for the whole family

62%

OF FRENCH PEOPLE consider video gaming a positive activity

86%

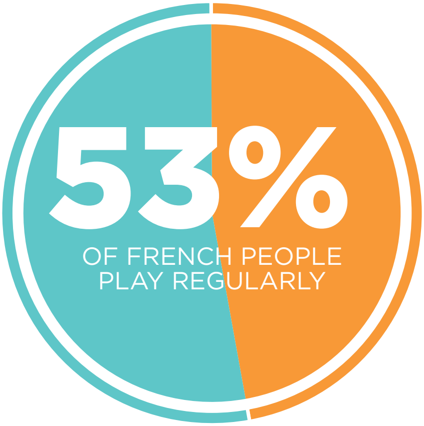
OF FRENCH PEOPLE consider video gaming an innovative sector

80%

OF FRENCH PEOPLE consider video games are created by real artists

Source: SELL/GfK "French public and Video gaming" survey on the basis of 1,023 people aged 10 to 65, October 2017

VIDEO GAMING:
A LEISURE ACTIVITY FOR EVERYONE



53%

OF FRENCH PEOPLE
PLAY REGULARLY

MEN **53%** WOMEN **47%**

68%

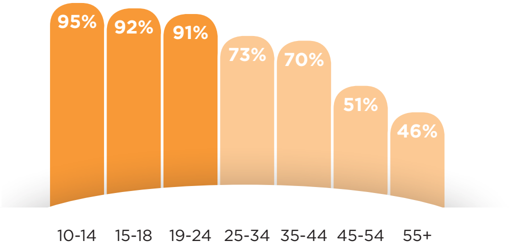
OF FRENCH PEOPLE
PLAY AT LEAST
OCCASIONALLY

34

AVERAGE AGE OF
A VIDEO GAMER

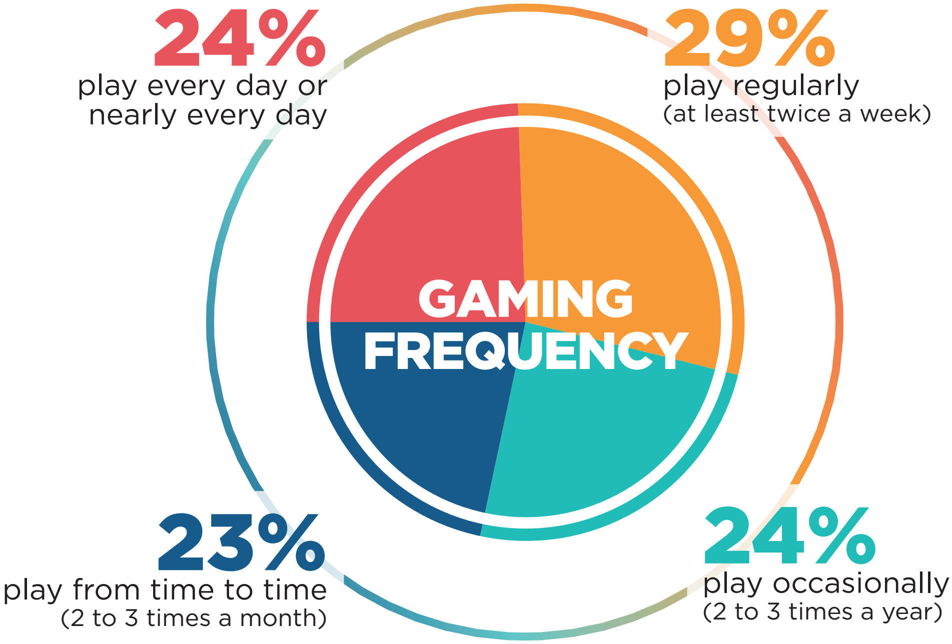
MEN **35**
WOMEN **33**

PERCENTAGE OF GAMERS
BY AGE GROUP

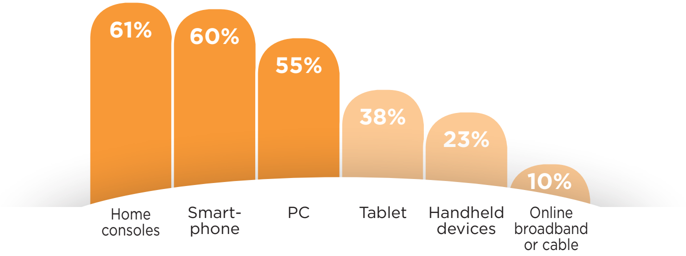


Source: SELL / GFK "The French and Video gaming" survey
Based on 1,023 people aged between 10 and 65, October 2017

AMONG FRENCH GAMERS



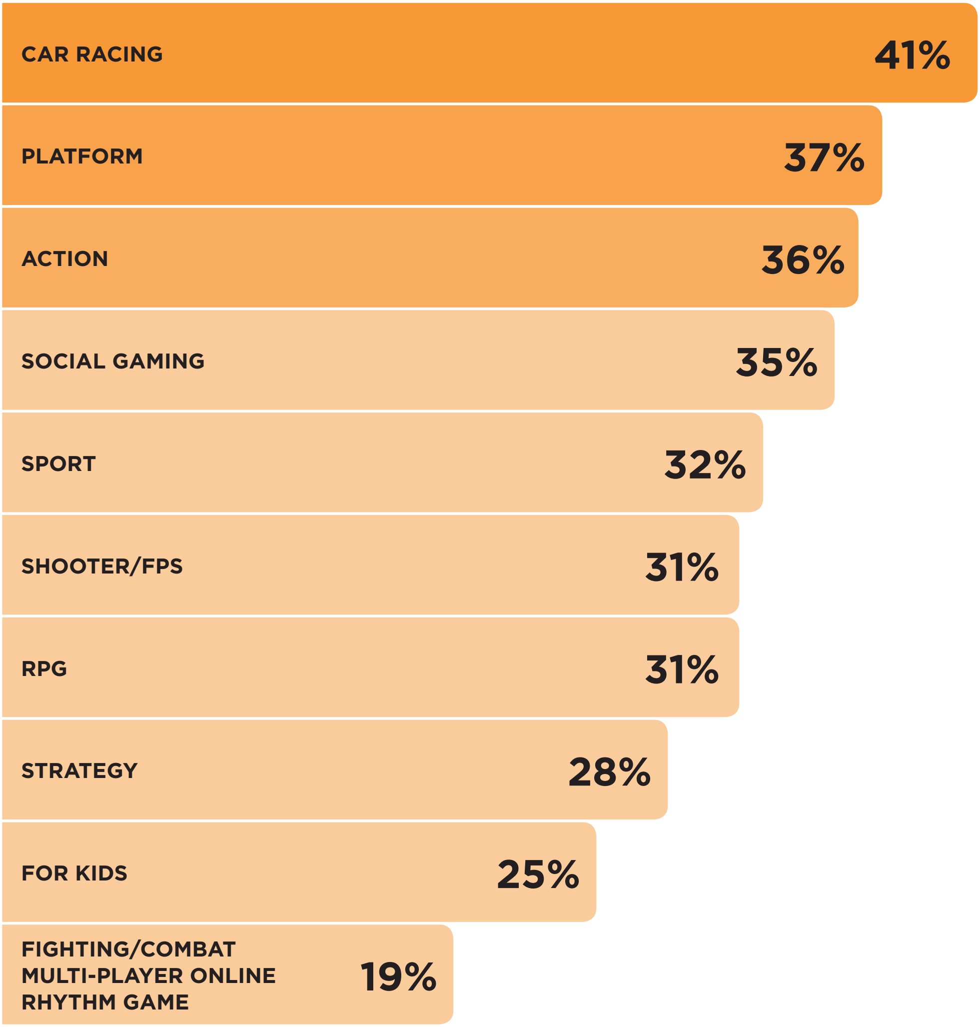
BREAKDOWN OF GAMERS BY PLATFORM



Source: SELL / GFK "The French and Video gaming" survey based on 1,023 people aged between 10 and 65, October 2017

TOP 10

TYPES OF VIDEO GAMES MOST PLAYED IN 2017



Source: Source: SELL / GFK "The French and Video gaming" survey based on 1,023 people aged between 10 and 65, October 2017

FRENCH PEOPLE AND THEIR HABITS

(hours per week)

FRENCH PEOPLE AND THEIR HABITS		GAMER HABITS
28.9	**SURF THE WEB** + 1.4 hours	30.3
24.3	**WATCH TELEVISION** - 1 hour	23.3
8.9	**LISTEN TO MUSIC** (not including the radio) + 1.8 hours	10.7
8.4	**LISTEN TO THE RADIO** - 0.2 hours	8.2
4.9	**WATCH VIDEOS** (DVD, Blu-ray, VOD, streaming, catch up...) + 1.4 hours	6.3
3	**PLAY ON THE SMARTPHONE OR TABLET** + 2.1 hours	5.1
2.2	**PLAY ON THE CONSOLE OR PC** + 2.1 hours	4.3
3	**READ BOOKS** (physical or digital) + 0.2 hours	3.2
1.9	**READ NEWSPAPERS OR JOURNALS** - 0.1 hours	1.8
1.1	**GO TO THE CINEMA** + 0.1 hours	1.2

Source: Source: SELL / GFK "The French and Video gaming" survey based on 1,023 people aged between 10 and 65, October 2017

CHAPTER 3

A RESPONSIBLE INDUSTRY

> **Since 17th December 2015, the PEGI system has been accredited by the French Home Secretary. The government has made the age and risk rating system mandatory for the video gaming sector.**

PEGI

PAN EUROPEAN GAME INFORMATION

The PEGI age rating system (Pan European Game Information) gives parents throughout Europe the opportunity to make enlightened decisions before purchasing a video game.

Launched in spring 2003, it has replaced a certain number of national age ratings through unique labels that are now used in most European countries. The system enjoys the support of the leading console manufacturers, including Sony, Microsoft and Nintendo, and also interactive game publishers and developers throughout Europe. It is also applied to all new apps available from the Google Play Store. The age rating system was created by the ISFE - the Interactive Software Federation of Europe.

What do the labels mean?

The PEGI labels appear on the front and back of the cover, indicating one of the following age ratings: 3, 7, 12, 16 and 18. They provide a reliable indication of the suitability of the game's content with regard to the protection of minors.

The age rating does not take into account the difficulty of the game or the skills required to play it. They are descriptors (see page 41) appearing on the back cover, indicating the main reasons why a game has a specific age rating.

CREATED IN **2003**

PRESENT IN **38 COUNTRIES**

NEARLY **30,000** GAMES ENDORSED

FEDERATING **1,800** MEMBER COMPANIES

PEGI LABELS

	3™ www.pegi.info	7™ www.pegi.info	12™ www.pegi.info	16™ www.pegi.info	18™ www.pegi.info
VIOLENCE™		■	■	■	■
BAD LANGUAGE™			■	■	■
FEAR™		■	■		
SEX™			■	■	■
DRUGS™			■	■	■
GAMBLING™			■	■	■
DISCRIMINATION™					■

THE LABELS

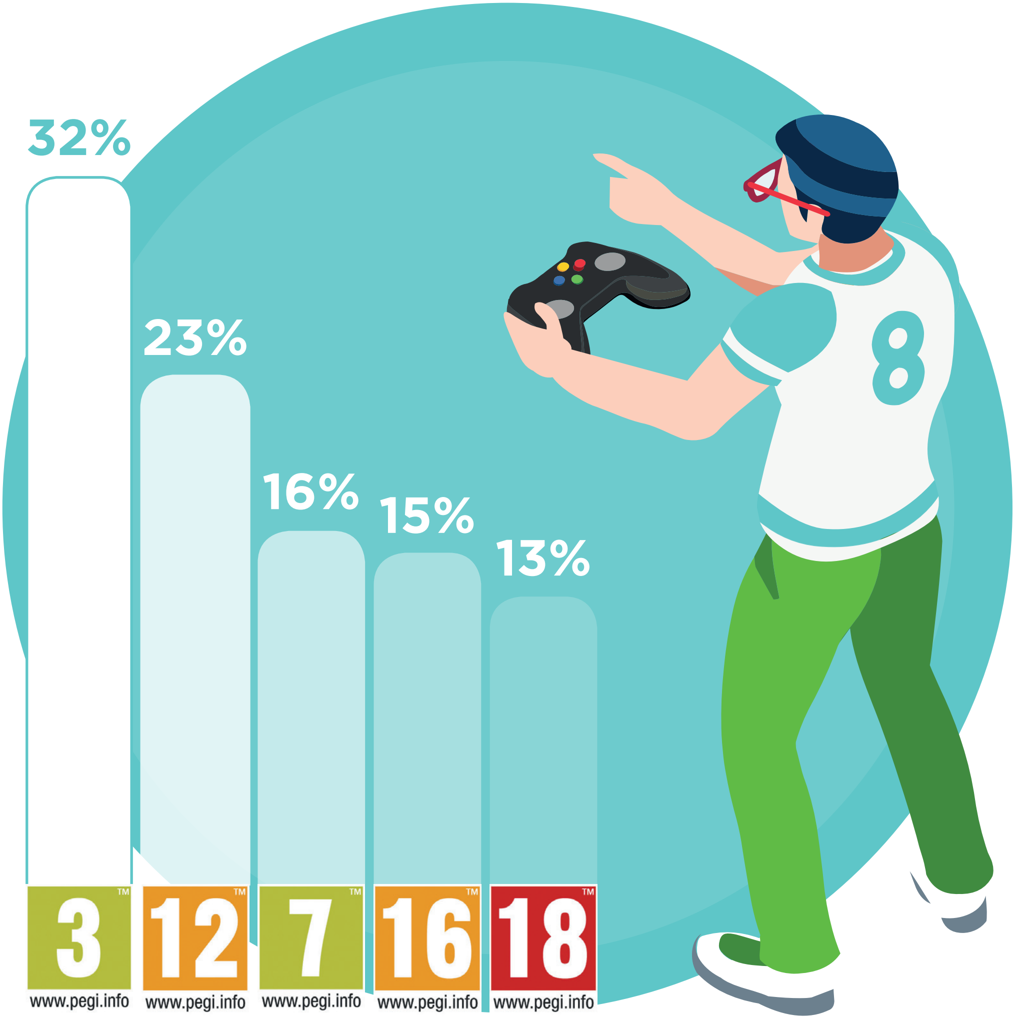
3 www.pegi.info	Suitable for all ages. Mild violence in a comical context. Fantasy characters. No inappropriate content.
7 www.pegi.info	Unrealistic. Implicit violence. Cartoon, funny. Frightening scenes for young children.
12 www.pegi.info	Violence towards fantasy characters or unrealistic violence towards human characters. Moderate foul language, nudity, horror.
16 www.pegi.info	Realistic violence towards human characters. Sports action with presence of blood. Foul language, drug use. Representation of criminal activity.
18 www.pegi.info	Extreme violence to defenceless or innocent human characters. Idealisation of drug use. Sexual expression or activity.

BAD LANGUAGE	This game contains **bad language.**
DISCRIMINATION	This game contains images which may encourage **discrimination**.
DRUGS	This game refers to the use of **drugs** (including tobacco and alcohol).
SEX	This game shows nudity and/or sexual behaviour or **makes sexual references**.
VIOLENCE	This game contains **violent scenes**.
FEAR	This game may **frighten** young children.
GAMBLING	This game encourages and/or teaches **gambling**.
ONLINE	This game allows **online gaming** and may therefore allow inappropriate content.

PEGI

ANALYSIS OF THE 2017 OFFER

(physical market)

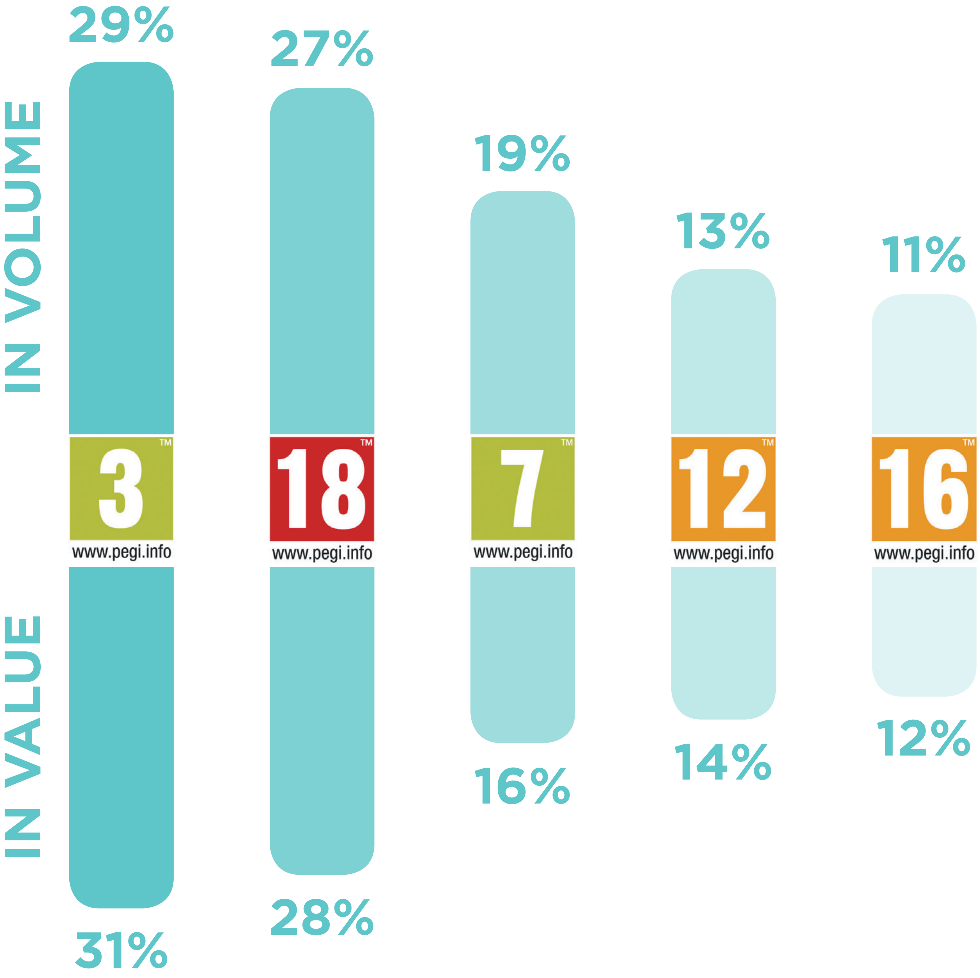


Source: *SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017.*

PEGI

SALES ANALYSIS MARKET SHARE IN 2017

(physical market)



Source: *SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017.*

PEDAGOJEUX.FR

THE WEBSITE FOR INFORMATION AND RAISING AWARENESS ABOUT VIDEO GAMES

The PédaGoJeux website guides parents and educators through the complex world of video gaming. On pedagojeux.fr, parents can find all the best practices and keys to understanding how to best support their children in this leisure activity.

Questions about gaming time, sleep, age, game content and health are major concerns for adults today. The PédaGoJeux collective believes it is essential that parents know and understand the PEGI labels so they can select games suitable for their child's age and sensitivity and adapted to their family values. In the opinion of PédaGoJeux, talking to their children about their gaming experiences and gaming together as a family are also essential.

To extend its scope, PédaGoJeux has been developing a network of educational mediators since 2014, the PédaGoJeux Ambassadors, for the most part state or charity entities working in the fields of family awareness and information. In 2014, this programme received the "Défenseur des droits" label at a celebration of the 25th anniversary of the Convention on the Rights of the Child.
In 2015, PédaGoJeux focused more specifically on younger gamers and created PédaGoJeux Junior, a space with content dedicated to 6-12 year olds. With Tralalere (Internet Sans Crainte) and SELL, two of its founding members, PédaGoJeux is involved in the launch of GameCode, a video game design app for 9-14 year-olds. It encourages them to move from consumer to designer and gives them the resources to take a step back and view the game itself more critically in terms of how they game themselves. With GameCode, children will see behind the scenes of how a video game is made and discover programming, developing their digital knowledge and culture.

PédaGoJeux.fr
LE JEU VIDÉO EXPLIQUÉ AUX PARENTS

PédaGoJeux.fr
AMBASSADEUR

junior
PédaGoJeux.fr

PédaGoJeux is a collective created in 2008 by people from public bodies, the gaming industry and associations.

Run by the National Union of Family Associations (UNAF), the PédaGoJeux collective has five founding members: the Ministry for Family Affairs, Internet Sans Crainte, the Union of Video Game Publishers (SELL), JeuxOnLine and UNAF. In 2017 it was joined by two new members: the National Association for Eyesight Improvement (AsnaV) and Action Innocence Monaco. The multi-representational nature of PédaGoJeux ensures a balanced view of video gaming, Without demonising or venerating it. The objective is to present all the assets and understand areas for concern.

PARENTAL BEHAVIOUR

TOWARDS VIDEO GAMES.

84%
of parents are careful about their child's gaming

71%
of parents play video games with their children

WHY DO THEY GAME WITH THEM?

66%
to share an activity

40%
for fun

36%
because the children ask them to

36%
because they like to game

23%
to check game content

GAMING FREQUENCY OF PARENTS WITH THEIR CHILDREN

7%
frequently

22%
regularly

42%
occasionally

11%
rarely

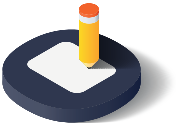
16%
never

Source: SELL/GfK "French public and Video gaming" survey
on the basis of 1,023 people aged 10 to 65, October 2017

CHAPTER 4

SELL: THE UNION OF VIDEO GAME PUBLISHERS

S.E.L.L.
SYNDICAT DES EDITEURS DE LOGICIELS DE LOISIRS



SELL'S MISSIONS

The Union of Video Game Publishers (SELL) was founded in 1995 by key players on the video game market. To support the growing video game industry and its accessibility, video game professionals (console manufacturers, game publishers, accessory manufacturers, etc.) needed to speak with the same voice. Following the example of the Interactive Software Federation of Europe (ISFE) which defends the interests of the video gaming sector on a European level, SELL immediately became the primary contact for French public institutions, the media and different associations.

In twenty years, SELL has taken many decisive actions to ensure video gaming is recognised as one of France's favourite leisure activities. This success is not solely down to the quality of games sold by SELL members. Aware of their responsibilities to gamers and their friends and families, in 2003 SELL members implemented a simple, complete and independent video game rating system: PEGI (Pan European Game Information). SELL expressed the industry's desire to be responsible through the PEGI rating system and through an information resource for parents (PédaGoJeux). In 2015 this commitment to society became concrete with the PEGI system's approval from the French Home Secretary as the rating system for video games in France.

SELL's main objective is to promote video games and gaming with the general public, national and European stakeholders and the authorities. For this, SELL organises two shows every year, the Interactive & Digital Entertainment Festival (IDEF) and Paris Games Week (PGW), federating the main stakeholders in the video game sector.

S.E.L.L.
SYNDICAT DES EDITEURS DE LOGICIELS DE LOISIRS

CONSUMERS

- PEGI
- PédaGoJeux

PROFESSIONALS

- Studies
- Public relations
- IDEF

PUBLIC AUTHORITIES

- Government
- Institutions
- European Union

GAMERS

- Paris Games Week
- News
- Prevention

IDEF is a trade fair. Ever year, all of the video game industry comes together there. Over three days, they present industry buyers with gaming trends and new products and services which will create a buzz for the Christmas season. Furthermore, panels, conferences and round tables introduce and explain new usages as well as new technologies which will move the video game industry forward, an industry which is enjoying constant growth.

At Paris Games Week, over five days more than 300,000 people come to play, meet and discover all the sector's innovations and the biggest eSport competitions. Hundreds of thousands of gamers, their families and friends will play and discover the latest titles, technologies and peripherals for the Christmas season. Even though it is open to all and has events suitable for every audience, Paris Games Week has an area specially designed for younger gamers: Junior PGW. There, children and parents can discover games, accessories and activities specially designed for a younger audience. PGW is also an opportunity to meet some of the colleges offering courses in video gaming and digital design. Finally, the world's third largest video game show couldn't forget the professionals! Game Connection is a space where industry professionals can meet and discover creations and offers which will hit the headlines in the coming months and years.

SELL also has a vocation to defend the interests of its members and, more generally, all of the video game sector. This includes software publishers, console manufacturers, accessory manufacturers and also development studios and colleges offering video game courses.

PARIS GAMES WEEK

Photos: Nicolas Gavet

PROMOTE THE INDUSTRY'S CREATIVITY, INNOVATION AND RESPONSIBILITY

Throughout the year SELL, which embraces an informative, educational and promotional approach to the video gaming industry, gives a voice to many talented people from the sector.
Since 2017, SELL has been spotlighting all the richness of video gaming through various documentaries.

WOMEN IN THE VIDEO GAME INDUSTRY

Social equality is a fabulous resource for video gaming. At Paris Games Week, SELL revealed a documentary built around nine portraits of women in the industry. They talk about their personal experience and their careers, exploring and analysing why, in their opinion, women are still under-represented in the profession. The second chapter of this series focuses on tomorrow's professionals and gives a voice to those running specialised courses and also female students too. By revealing their motivations and career paths, these future professionals share their vision of the video gaming industry and the future. They want to push the boundaries and encourage more women to play key roles in the dynamic vibrancy of the video game industry.

FIND ALL THIS CONTENT ON THE WEBSITE SELL.FR

GAME IN PROGRESS

This documentary takes us behind the scenes of video game design. Lasting 52 minutes and built around five episodes, *Game in Progress* reveals the underside of video game design and explores the production stages and roles that are involved through interviews with a few of the big French development studios. Revealed early March, the first episode is called "La Bonne Idée" and gives a voice to many designers who look back on the creative process and their sources of inspiration behind each video game.

VIDEO GAMING IN A FEW FIGURES

What does the video game market represent today? What is its demographic and how economically dynamic is it? Who are the gamers? SELL retraces the evolution of the French video game market through a few key figures recorded between 1999 and 2017. You will find that over eighteen years, the average age of gamers rose from 21 to 34 and that the market's turnover has grown hugely from 862 million to 4.3 billion euros.

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NOTES