

MARCH 2022

ESSENTIAL

VIDEO GAME NEWS



FRENCH MARKET

REPORT 2021

MARCH 2022

ESSENTIAL

VIDEO GAME NEWS

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EDITORIAL

A WORD FROM THE CHAIRWOMAN



The year 2020 generated record results for our industry. The very specific health context and the successive lockdowns, combined with the dynamism of the games offer,

further amplified basic trends that were already very positive. In 2021, even though we might have expected a return to normal, the video game industry posted a new record performance, with a turnover of 5.6 billion euros, representing an increase of 1.6%. So, if we look at the last two years, since 2019 the sector has experienced 13.5% growth.

In 2021, the three ecosystems continue to perform at excellent levels, or even improve further; the console ecosystem grew by 1% and achieved its best performance since 2008, the Gaming PC ecosystem grew by 5%, while mobile gaming experienced a very slight decrease of 1% after the previous year's growth of 16%.

It is primarily the momentum around hardware that has driven the market upwards in 2021. With the arrival of new consoles at the end of 2020 and the dynamic Gaming PC ecosystem, the 2021 video game market was driven by the growth of Hardware (Console + Gaming PC), which achieved a historical turnover of 1.766 billion euros, i.e. 22% growth compared to 2020. This dynamism should continue through 2022 and support the entire sector. The video game market, with its cyclical model, is experiencing growth in hardware sales which mechanically generates sales of accessories and software. The increase in new equipment is closely linked to real structural gains.

In terms of games sales, unsurprisingly we are witnessing a slight downturn, but again with a very solid level of performance with a turnover of 3.404 billion euros (Console + PC + Mobile, Physical + Digital), down slightly by 7.4% compared to 2020. Overall, this consistency in performance level is particularly encouraging considering

The resumption of more normal activity suggests a promising outlook for 2022, with the release of many eagerly awaited games

the very unusual nature of 2020 and the major difficulties encountered by the industry in 2021: launch delays, supply difficulties, reorganisation of teams, etc. In this highly delicate context, this segment achieved its second best performance ever.

The resumption of more normal activity suggests a promising outlook for 2022, with the release of many games eagerly awaited by the video game-playing communities and the return of key events. The demand for new consoles is strong, as is the growth pipeline. The 2022 catalogue of new products will be exceptional, as the first releases of the year show. The market looks set to be extremely rich and dynamic in terms of sales.

More than ever, our industry is important. This gives us a responsibility to the player communities. We will continue with all the more determination to inform, prevent and raise awareness among all our audiences, in order to continue to create a benevolent environment for gameplay.

**TAKE CARE,
JULIE CHALMETTE**

PANELS AND METHODOLOGY

Estimations for 2021 turnover are the result of collaboration between four organisations providing SELL their data, for 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
- IDC for Hardware and Gaming PC monitors



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 sales 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. The retail panel has been launched in 25 European countries. The GSD digital panel today covers 50 countries in Europe, the Middle East, Africa and Asia-Pacific. The panel is operated by Sparkers.

METHODOLOGY:

-Retail 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. In parallel, the publishers provide data to hone the extrapolation calculation models to offer a sharper vision of markets that are not completely covered by the retail panel.

- Digital panel: digital data sales cover full games sales on the PlayStation Network (PSN), Xbox Live (XBL), Nintendo eShop (third-party publishers) 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 game downloads based on real sales.



GAMETRACK ABOUT GAMETRACK

GameTrack is an additional project set up in 2011, 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 players, their buying behaviour across all platforms, helping to generate an in-depth view of their video game 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 of 1,000 people aged 15 and over. It 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.

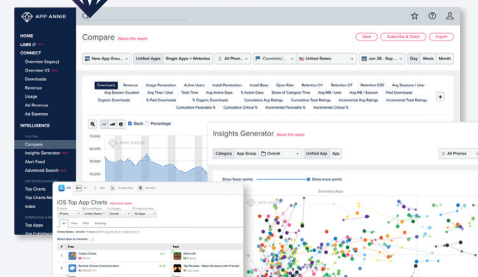
IDC ABOUT IDC

IDC is a leading provider of research, consulting and event management services to the Information Technology, Telecommunications and Consumer Technology markets. IDC helps IT market professionals and investors make strategic, evidence-based decisions. More than 1,100 analysts have been providing global, regional and local expertise on technology opportunities and trends in more than 110 countries around the world for over 50 years. IDC is a subsidiary of IDG, the global leader in the information market dedicated to information technologies.

METHODOLOGY:

IDC tracks sales of hundreds of consumer and professional product categories (both hardware and software) worldwide. Thanks to the largest community of analysts in the market, IDC can draw on and combine three sources: data collected from suppliers (OEMs, component or end-product manufacturers, publishers, etc.), resellers (distributors, wholesalers, VARs, operators, etc.) and surveys of consumers and end users. This information is consolidated globally, verified locally and cross-checked with additional research (financial and economic reports, demographics, etc.).

APP ANNIE



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 download and revenue performance.

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CHAPTER 1

THE FRENCH VIDEO GAME MARKET

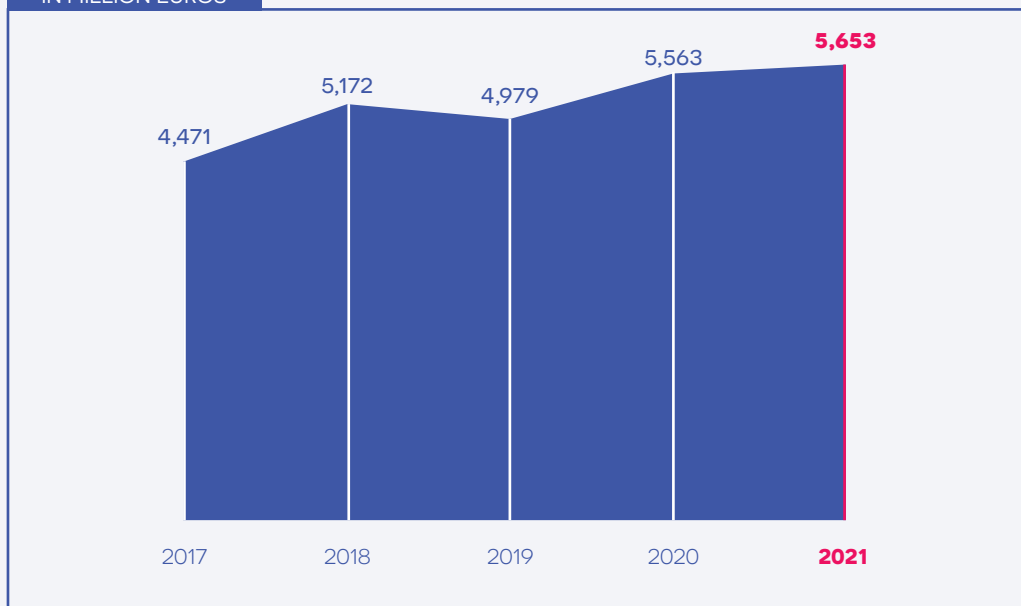


2021 MARKET REPORT TOTAL TURNOVER



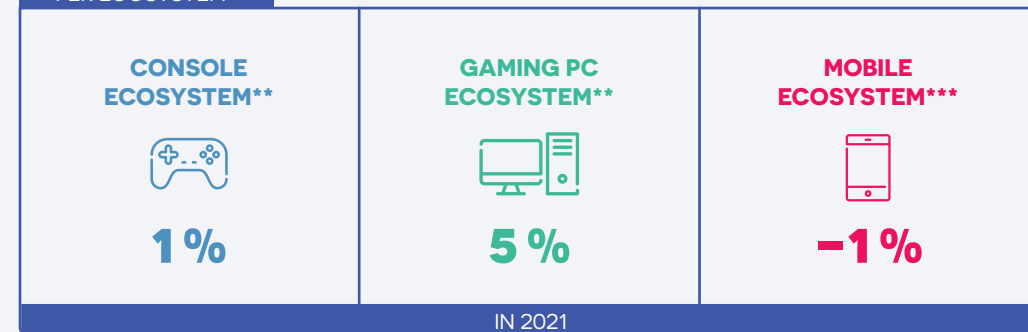
GROWTH IN MARKET SALES**

IN MILLION EUROS



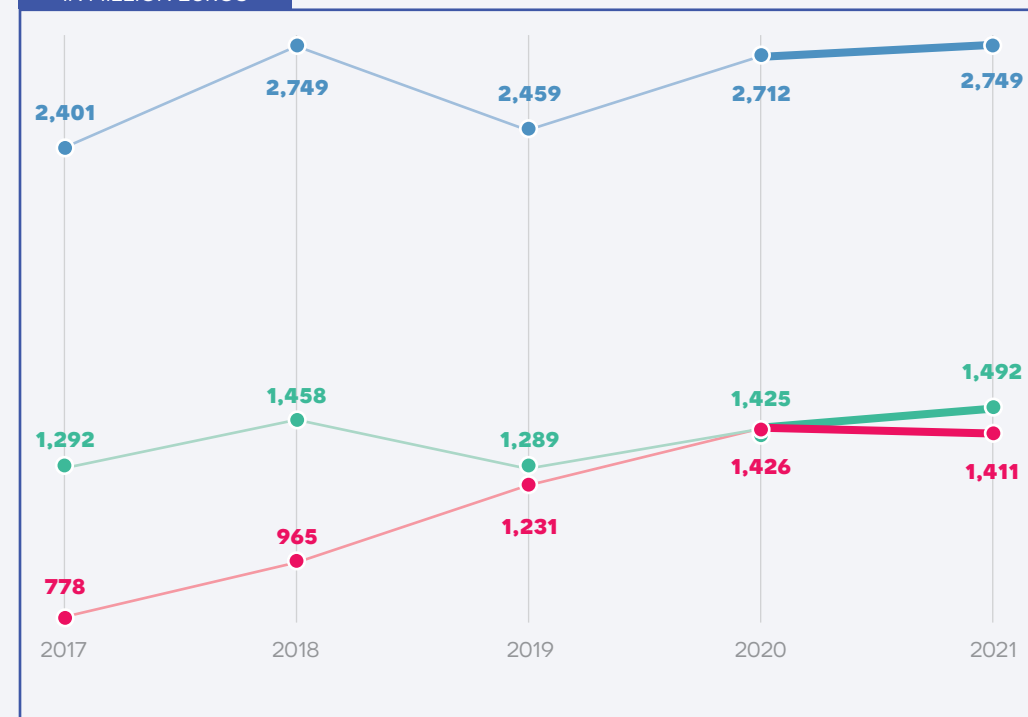
GROWTH IN SALES

PER ECOSYSTEM*



GROWTH IN SALES BY ECOSYSTEM****

IN MILLION EUROS

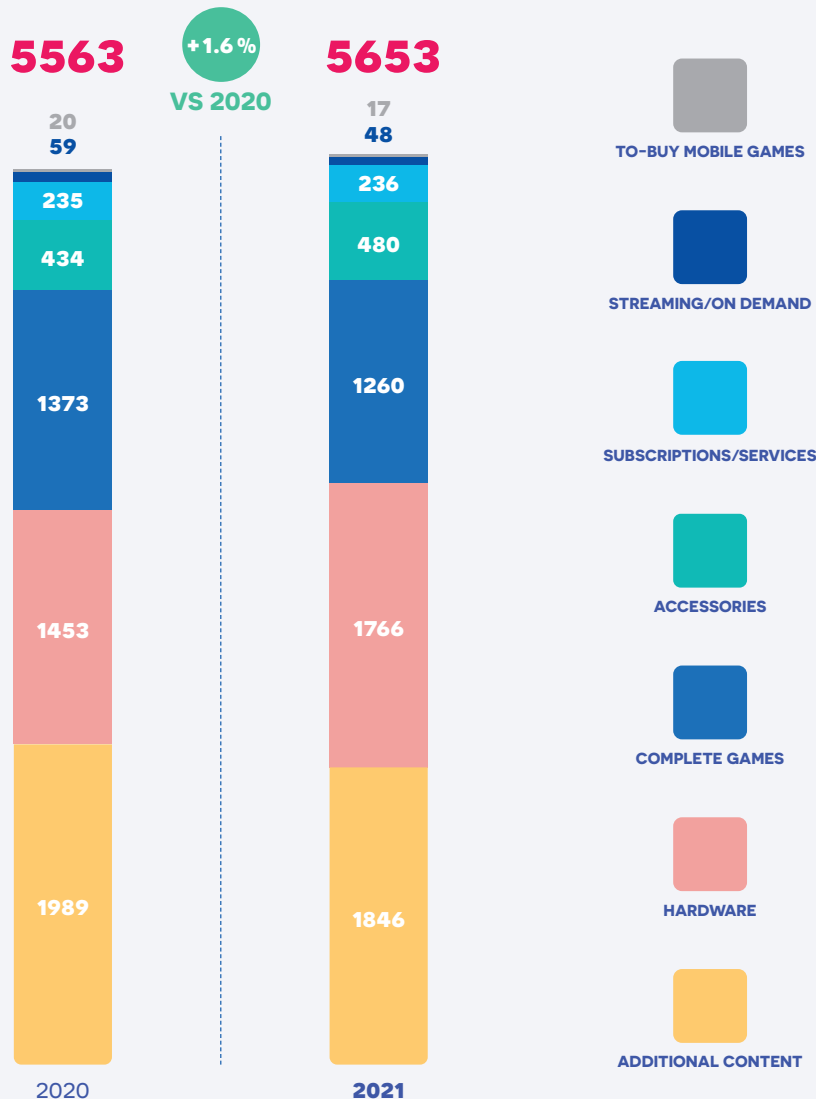


Sources: SELL data, from GSD/GameTrack/App Annie/IDC panels at end 2021.
 **Ecosystems: Console + PC + mobile, physical and digital.
 **Historical data revised in 2021.

*Ecosystems: Console + PC + mobile, physical and digital.
 ** Sources: SELL data, from GSD/GameTrack/IDC panels at end 2021.
 ***: GameTrack estimations using user spending data from App Annie 2021, converted into euros and including French taxes.
 **** Historical data revised in 2021.

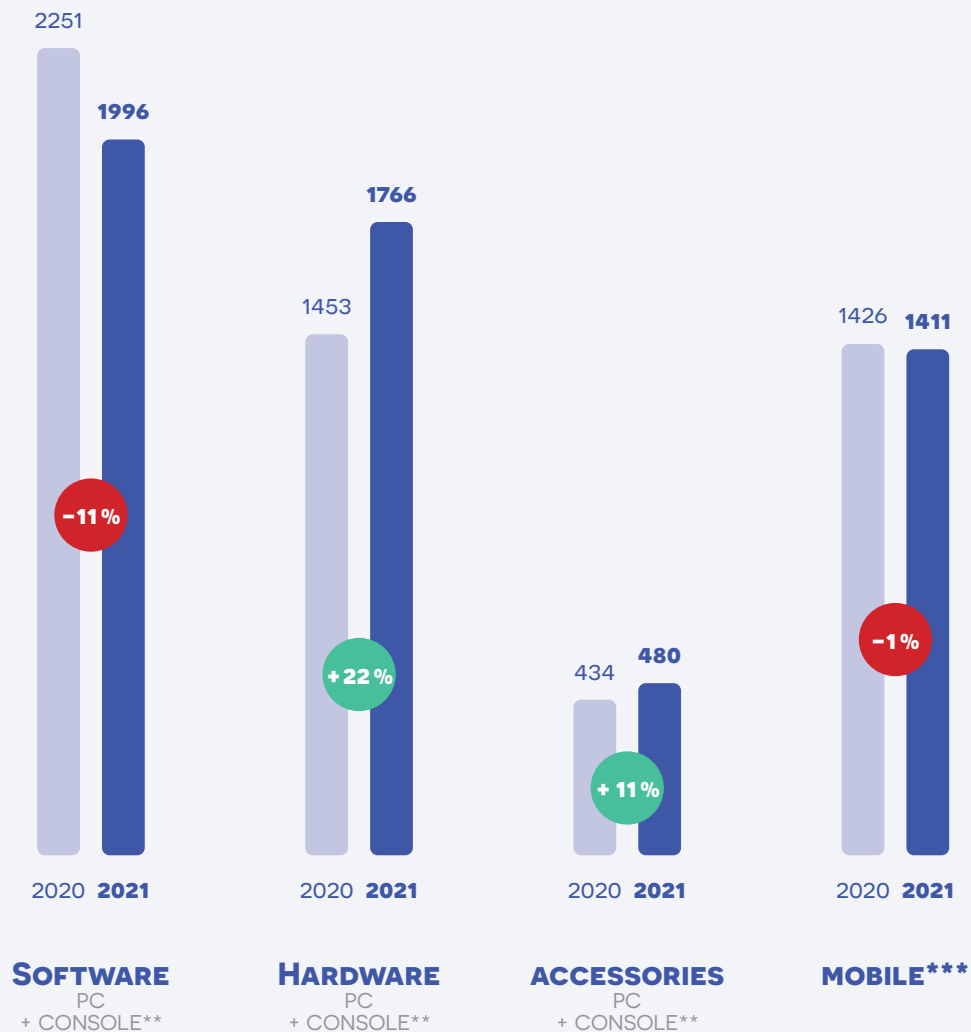
GROWTH IN SALES

IN MILLION EUROS*



MARKET SEGMENTS BREAKDOWN OF TURNOVER*

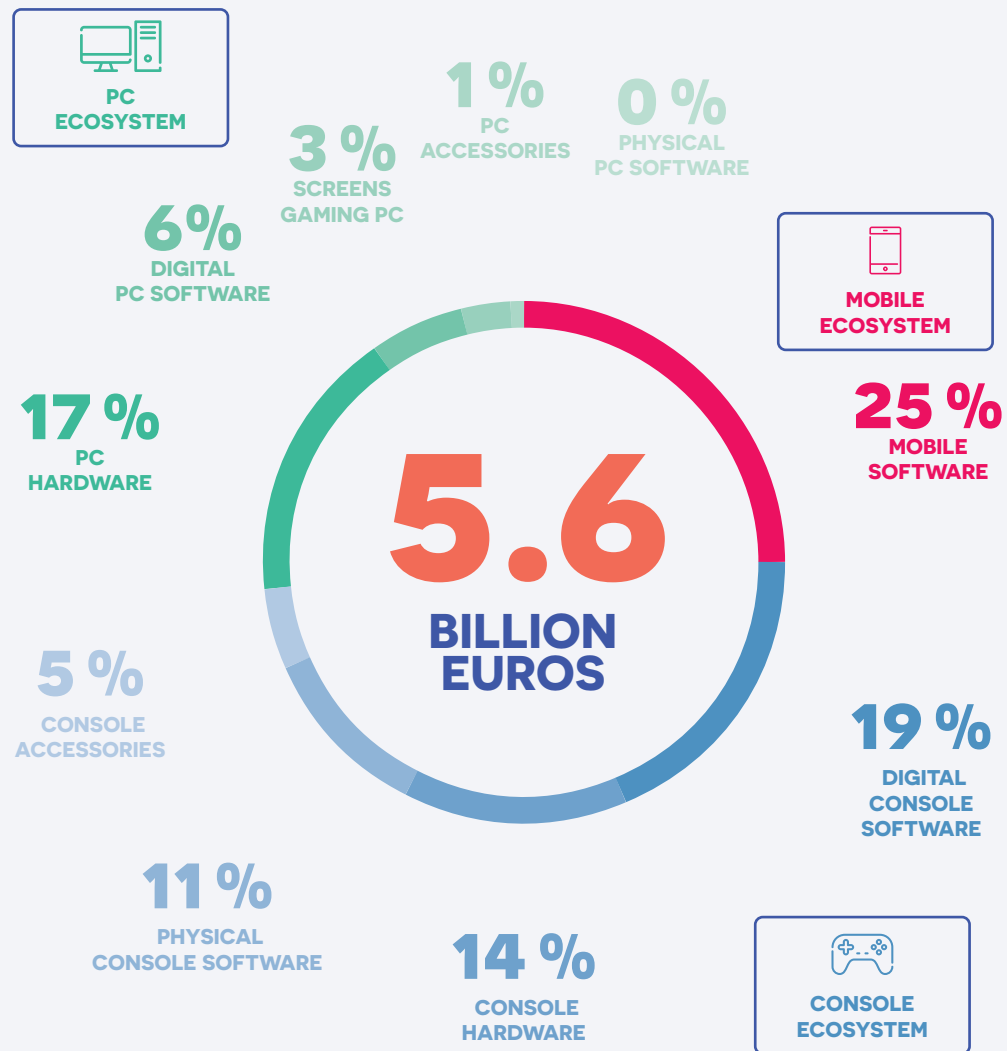
IN MILLION EUROS



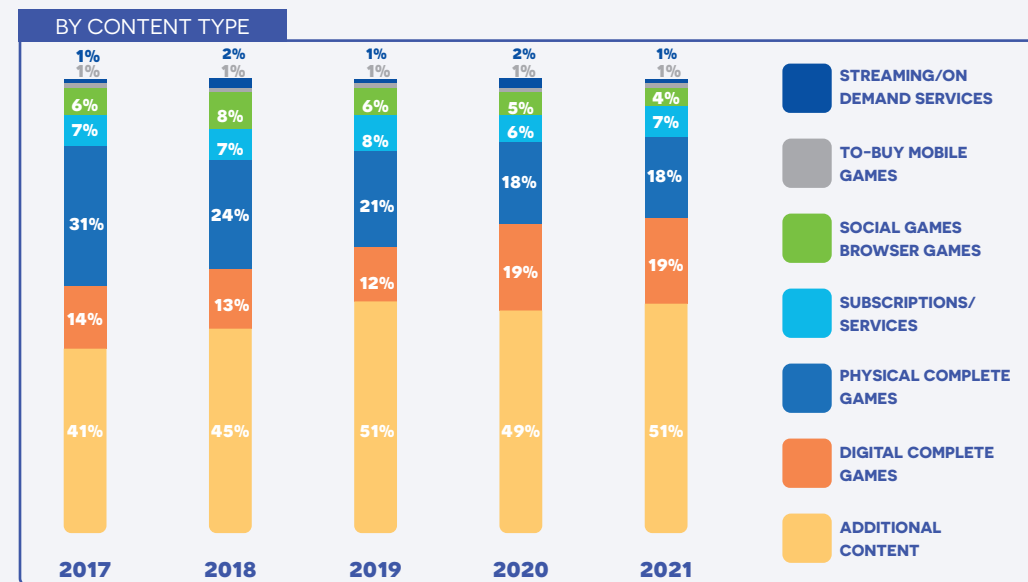
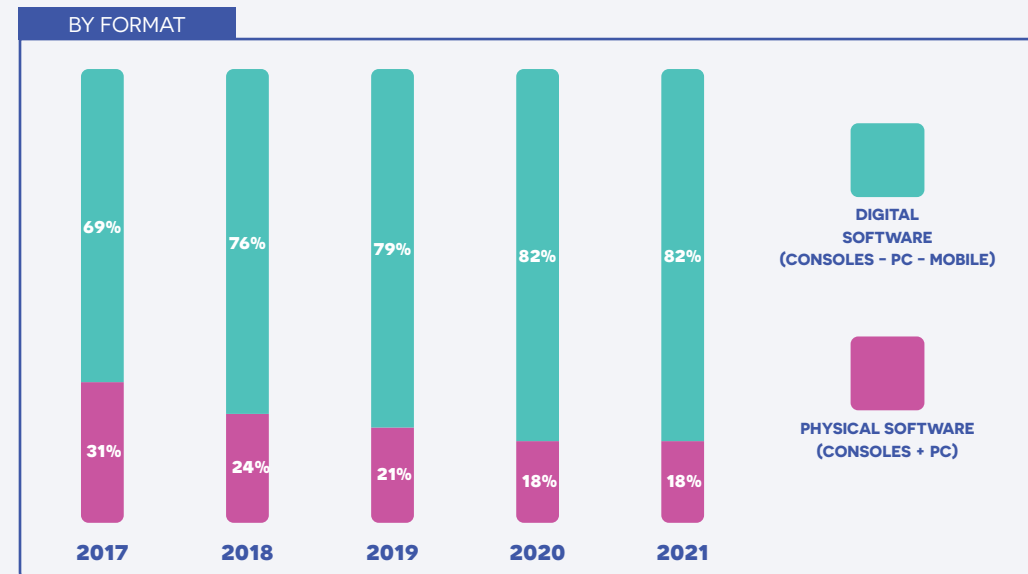
Sources: SELL data, from GSD/GameTrack/App Annie/IDC panels at end 2021.
 *Ecosystems: Console + PC + mobile, physical and digital.
 **Historical data revised in 2021.

Sources: *Ecosystems: Console + PC + mobile, physical and digital. Historical data revised in 2021.
 ** Sources: SELL data, from GSD/GameTrack/IDC panels at end 2021.
 ***: GameTrack estimations using user spending data from App Annie 2021, converted into euros and including French taxes.

CLOSE-UP: SEGMENTS: MARKET SHARE



CLOSE-UP: SOFTWARE BREAKDOWN OF TURNOVER*

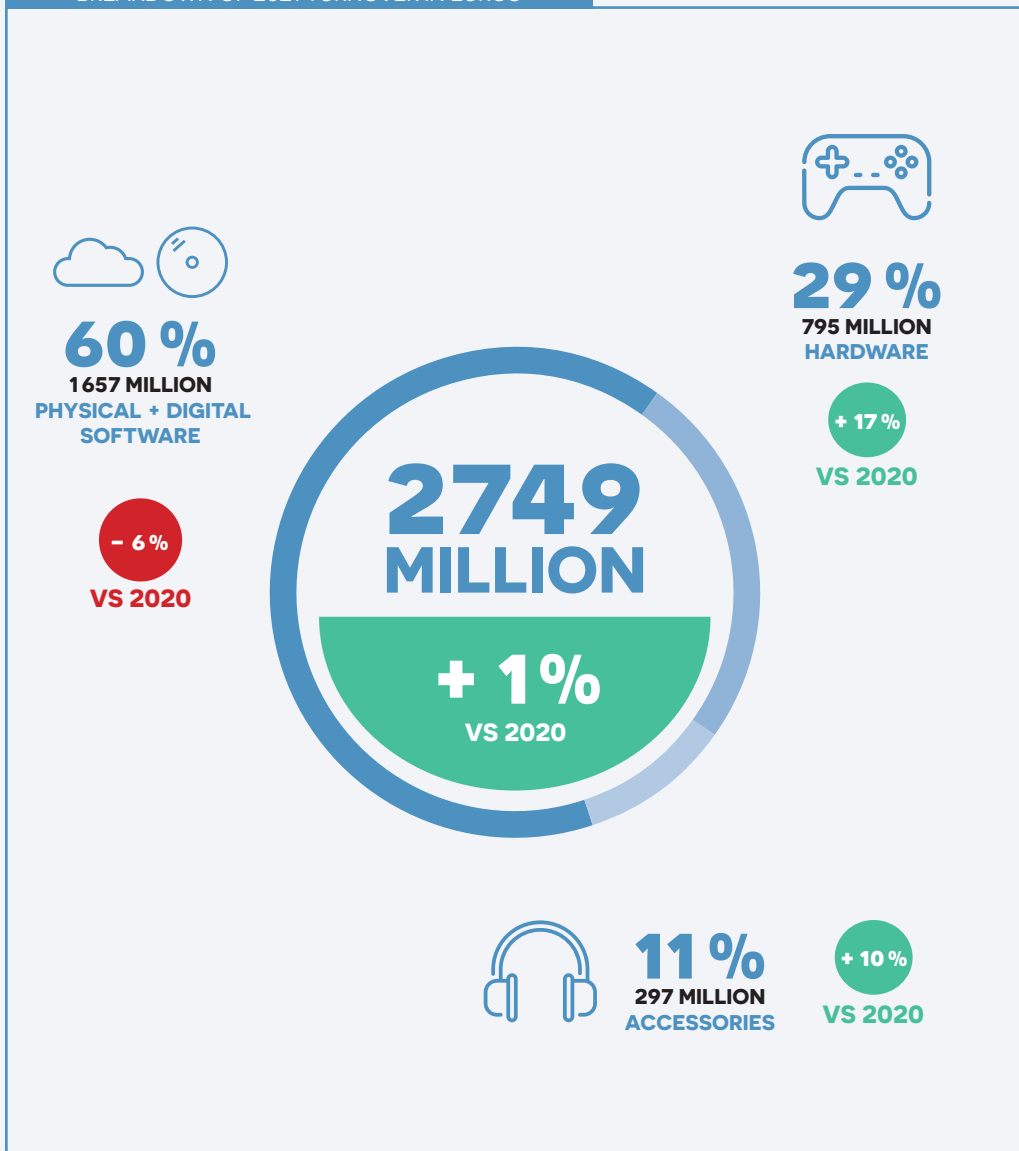


Sources: SELL data from GSD/GameTrack/App Annie Intelligence //DC at end 2021.

Sources: SELL data, from GSD, GameTrack, App Annie Intelligence panels at end 2021.

CONSOLE ECOSYSTEM

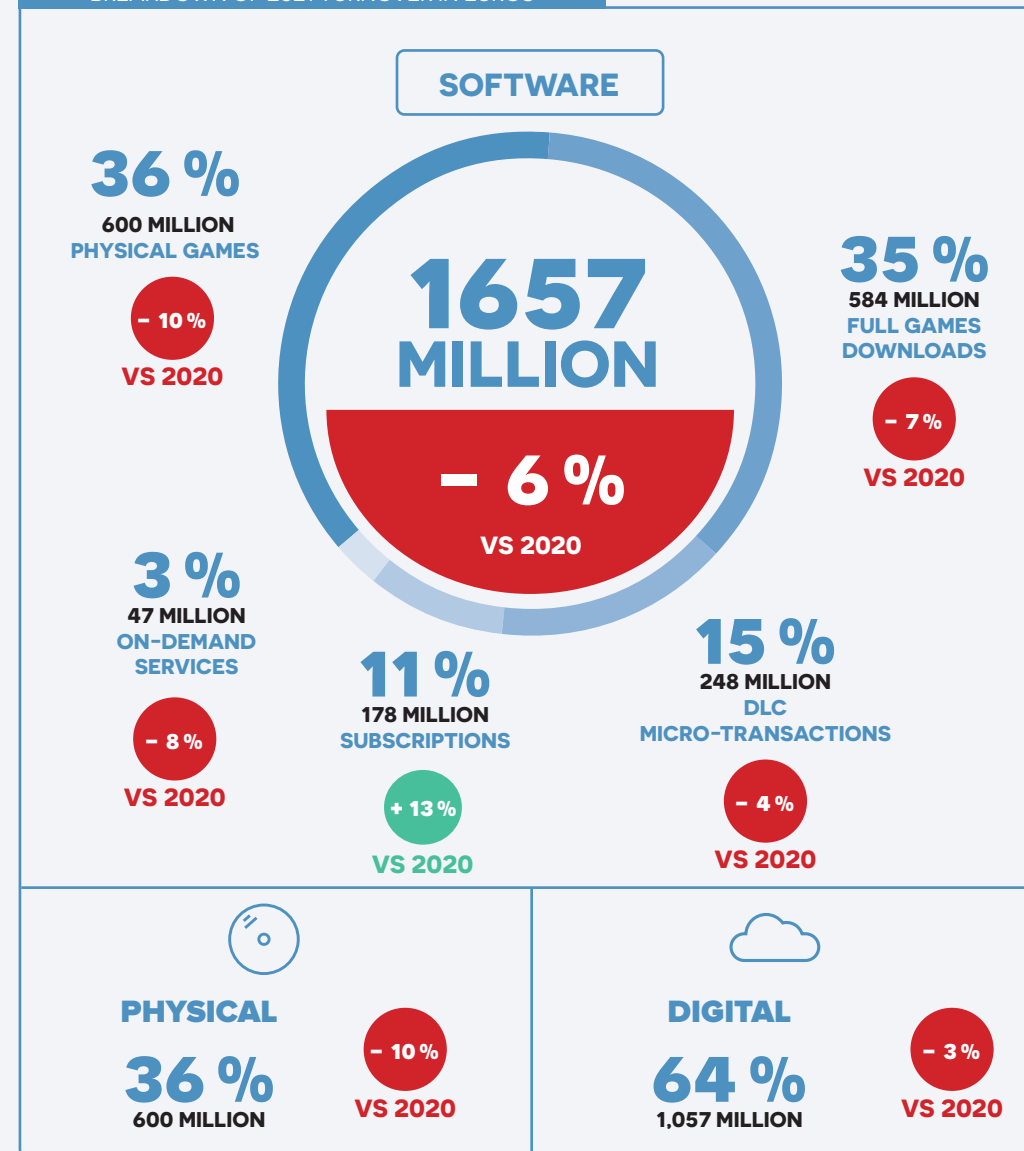
BREAKDOWN OF 2021 TURNOVER IN EUROS



Sources: SELL data, from GSD/GameTrack panels at end 2021.

CONSOLE ECOSYSTEM

BREAKDOWN OF 2021 TURNOVER IN EUROS



Sources: SELL data, from GSD/GameTrack panels at end 2021.

CONSOLE ECOSYSTEM

GROWTH IN SALES FOR 2021

HARDWARE



795

MILLION EUROS

+ 17 %

VS 2020

2.37



MILLION CONSOLES SOLD IN 2021

+ 2.4 %

VS 2020

Sources: SELL data, from GSD/GameTrack panels at end 2021.

CONSOLE ECOSYSTEM

GROWTH IN SALES FOR 2021

ACCESSORIES



297

MILLION EUROS

+ 10 %

VS 2020

TOP 3

CONSOLE ACCESSORIES

IN VALUE

IN VOLUME



CONTROLLERS

+ 4 %

1

+ 2 %

CONTROLLERS



HEADSETS AND AUDIO

+ 5 %

2

- 7 %

HEADSETS AND AUDIO



STEERING WHEELS

+ 136 %

3

- 15 %

MISCELLANEOUS (STYLUSES, PROTECTIVE GEAR, ETC.)






Sources: SELL data, from GSD/GameTrack panels at end 2021.

TOP 20 GAMES IN 2021

ALL PLATFORMS

PHYSICAL MARKET IN VALUE



 <p>FIFA 22 ELECTRONIC ARTS €56,954,126</p>	4	ANIMAL CROSSING: NEW HORIZONS	NINTENDO	€20,574,408
	5	CALL OF DUTY: VANGUARD	ACTIVISION BLIZZARD	€17,738,802
	6	POKÉMON BRILLIANT DIAMOND	NINTENDO	€17,659,543
	7	RING FIT ADVENTURE	NINTENDO	€17,617,654
 <p>MARIO KART 8 DELUXE NINTENDO €24,437,798</p>	8	MARIO PARTY SUPERSTARS	NINTENDO	€13,275,776
	9	POKÉMON SHINING PEARL	NINTENDO	€10,471,216
	10	THE LEGEND OF ZELDA: SKYWARD SWORD HD	NINTENDO	€10,384,037
	11	THE LEGEND OF ZELDA: BREATH OF THE WILD	NINTENDO	€9,147,651
 <p>SUPER MARIO 3D WORLD + BOWSER'S FURY NINTENDO €21,142,500</p>	12	FAR CRY 6	UBISOFT	€9,099,193
	13	FIFA 21	ELECTRONIC ARTS	€8,806,729
	14	SPIDER-MAN: MILES MORALES	SONY INTERACTIVE ENTERTAINMENT	€8,289,400
	15	MINECRAFT: NINTENDO SWITCH EDITION	MICROSOFT	€8,145,944
	16	NEW SUPER MARIO BROS. U DELUXE	NINTENDO	€7,741,493
	17	RATCHET & CLANK: RIFT APART	SONY INTERACTIVE ENTERTAINMENT	€7,330,572
	18	JUST DANCE 2022	UBISOFT	€7,221,646
	19	SUPER MARIO PARTY	NINTENDO	€7,101,519
20	RESIDENT EVIL VILLAGE	CAPCOM	€6,823,011	



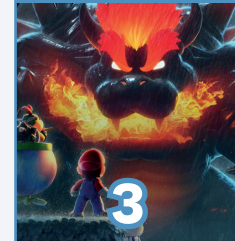
Sources: SELL data, from GSD/GameTrack panels at end 2021. Excluding bundles.

TOP 20 GAMES IN 2021

ALL PLATFORMS

PHYSICAL MARKET IN VOLUME



 <p>FIFA 22 ELECTRONIC ARTS 1,036,034</p>	4	ANIMAL CROSSING: NEW HORIZONS	NINTENDO	433,286
	5	POKÉMON BRILLIANT DIAMOND	NINTENDO	375,371
	6	MINECRAFT: NINTENDO SWITCH EDITION	MICROSOFT	301,907
	7	CALL OF DUTY: VANGUARD	ACTIVISION BLIZZARD	283,092
 <p>MARIO KART 8 DELUXE NINTENDO 503,150</p>	8	MARIO PARTY SUPERSTARS	NINTENDO	276,632
	9	RING FIT ADVENTURE	NINTENDO	259,379
	10	FIFA 21	ELECTRONIC ARTS	226,335
	11	POKÉMON SHINING PEARL	NINTENDO	221,879
 <p>SUPER MARIO 3D WORLD + BOWSER'S FURY NINTENDO 437,432</p>	12	THE LEGEND OF ZELDA: SKYWARD SWORD HD	NINTENDO	209,444
	13	GRAND THEFT AUTO V	TAKE-TWO INTERACTIVE	168,307
	14	THE LEGEND OF ZELDA: BREATH OF THE WILD	NINTENDO	161,470
	15	NEW SUPER MARIO BROS. U DELUXE	NINTENDO	157,774
	16	JUST DANCE 2022	UBISOFT	150,920
	17	SPIDER-MAN: MILES MORALES	SONY INTERACTIVE ENTERTAINMENT	149,241
	18	FAR CRY 6	UBISOFT	148,197
	19	SUPER MARIO PARTY	NINTENDO	145,846
20	51 WORLDWIDE GAMES	NINTENDO	140,496	

Sources: SELL data, from GSD/GameTrack panels at end 2021. Excluding bundles.

TOP 20 GAMES IN 2021

ALL PLATFORMS

PHYSICAL + DIGITAL MARKET IN VALUE



	4	SUPER MARIO 3D WORLD + BOWSER'S FURY	NINTENDO	€21,142,500
	5	ANIMAL CROSSING: NEW HORIZONS	NINTENDO	€20,574,408
	6	POKÉMON BRILLIANT DIAMOND	NINTENDO	€17,659,543
	7	RING FIT ADVENTURE	NINTENDO	€17,617,654
FIFA 22 ELECTRONIC ARTS €96 656 886	8	FIFA 21	ELECTRONIC ARTS	€16,923,300
	9	CALL OF DUTY: BLACK OPS COLD WAR	ACTIVISION BLIZZARD	€16,242,024
	10	FAR CRY 6	UBISOFT	€13,767,674
	11	MARIO PARTY SUPERSTARS	NINTENDO	€13,275,776
2	12	BATTLEFIELD 2042	ELECTRONIC ARTS	€12,027,036
CALL OF DUTY: VANGUARD ACTIVISION BLIZZARD €32,552,671	13	SPIDER-MAN: MILES MORALES	SONY INTERACTIVE ENTERTAINMENT	€12,026,537
	14	ASSASSIN'S CREED VALHALLA	UBISOFT	€11,874,750
3	15	POKÉMON SHINING PEARL	NINTENDO	€10,471,216
MARIO KART 8 DELUXE NINTENDO €24,437,798	16	THE LEGEND OF ZELDA: SKYWARD SWORD HD	NINTENDO	€10,384,037
	17	GRAND THEFT AUTO V	TAKE-TWO INTERACTIVE	€10,215,197
	18	RESIDENT EVIL VILLAGE	CAPCOM	€10,056,503
	19	THE LEGEND OF ZELDA: BREATH OF THE WILD	NINTENDO	€9,147,651
	20	NBA 2K22	TAKE-TWO INTERACTIVE	€8,744,953

TOP 20 GAMES IN 2021

ALL PLATFORMS

PHYSICAL + DIGITAL MARKET IN VOLUME



	4	CALL OF DUTY: VANGUARD	ACTIVISION BLIZZARD	486,957
	5	GRAND THEFT AUTO V	TAKE-TWO INTERACTIVE	469,634
	6	SUPER MARIO 3D WORLD + BOWSER'S FURY	NINTENDO	437,432
	7	ANIMAL CROSSING: NEW HORIZONS	NINTENDO	433,286
FIFA 22 ELECTRONIC ARTS 1,592,206	8	POKÉMON BRILLIANT DIAMOND	NINTENDO	375,371
	9	MINECRAFT: NINTENDO SWITCH EDITION	MICROSOFT	301,907
2	10	CALL OF DUTY: BLACK OPS COLD WAR	ACTIVISION BLIZZARD	287,912
MARIO KART 8 DELUXE NINTENDO 503,150	11	MARIO PARTY SUPERSTARS	NINTENDO	276,632
	12	RING FIT ADVENTURE	NINTENDO	259,379
3	13	POKÉMON SHINING PEARL	NINTENDO	221,879
FIFA 21 ELECTRONIC ARTS 501,483	14	SPIDER-MAN: MILES MORALES	SONY INTERACTIVE ENTERTAINMENT	220,349
	15	FAR CRY 6	UBISOFT	215,356
	16	ASSASSIN'S CREED VALHALLA	UBISOFT	214,396
	17	THE LEGEND OF ZELDA: SKYWARD SWORD HD	NINTENDO	209,444
	18	RESIDENT EVIL VILLAGE	CAPCOM	173,893
	19	BATTLEFIELD 2042	ELECTRONIC ARTS	161,797
	20	THE LEGEND OF ZELDA: BREATH OF THE WILD	NINTENDO	161,470

TOP 20 GAMES IN 2021 BY PLATFORM

PHYSICAL MARKET IN VALUE



	4	ANIMAL CROSSING: NEW HORIZONS	SWITCH	NINTENDO	€20,574,408
	5	POKEMON BRILLIANT DIAMOND	SWITCH	NINTENDO	€17,659,543
	6	RING FIT ADVENTURE	SWITCH	NINTENDO	€17,617,654
	7	MARIO PARTY SUPERSTARS	SWITCH	NINTENDO	€13,275,776
	8	FIFA 22	PS5	ELECTRONIC ARTS	€10,838,669
	9	POKÉMON SPARKLING PEARL	SWITCH	NINTENDO	€10,471,216
	10	THE LEGEND OF ZELDA: SKYWARD SWORD HD	SWITCH	NINTENDO	€10,384,037
	11	THE LEGEND OF ZELDA: BREATH OF THE WILD	SWITCH	NINTENDO	€9,121,225
	12	CALL OF DUTY: VANGUARD	PS4	ACTIVISION BLIZZARD	€9,052,777
	13	MINECRAFT: NINTENDO SWITCH EDITION	SWITCH	MICROSOFT	€8,145,944
	14	NEW SUPER MARIO BROS. U DELUXE	SWITCH	NINTENDO	€7,741,493
	15	RATCHET & CLANK: RIFT APART	PS5	SONY INTERACTIVE ENTERTAINMENT	€7,330,572
	16	FIFA 22 ESSENTIAL EDITION	SWITCH	ELECTRONIC ARTS	€7,237,815
	17	SUPER MARIO PARTY	SWITCH	NINTENDO	€7,101,519
	18	JUST DANCE 2022	SWITCH	UBISOFT	€6,933,129
	19	CALL OF DUTY: VANGUARD	PS5	ACTIVISION BLIZZARD	€6,142,291
	20	SUPER SMASH BROS. ULTIMATE	SWITCH	NINTENDO	€5,933,803

FIFA 22
ELECTRONIC ARTS
€33,372,604



MARIO KART 8 DELUXE
NINTENDO
€24,437,798




SUPER MARIO 3D WORLD + BOWSER'S FURY
NINTENDO
€21,142,500

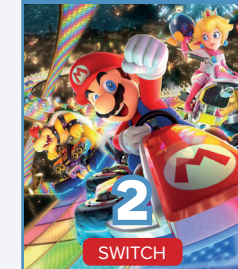
TOP 20 GAMES IN 2021 BY PLATFORM

PHYSICAL MARKET IN VOLUME

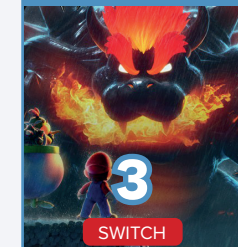


	4	ANIMAL CROSSING: NEW HORIZONS	SWITCH	NINTENDO	433,286
	5	POKÉMON BRILLIANT DIAMOND	SWITCH	NINTENDO	375,371
	6	MINECRAFT: NINTENDO SWITCH EDITION	SWITCH	MICROSOFT	301,907
	7	MARIO PARTY SUPERSTARS	SWITCH	NINTENDO	276,632
	8	RING FIT ADVENTURE	SWITCH	NINTENDO	259,379
	9	POKÉMON SPARKLING PEARL	SWITCH	NINTENDO	221,879
	10	THE LEGEND OF ZELDA: SKYWARD SWORD HD	SWITCH	NINTENDO	209,444
	11	FIFA 22 ESSENTIAL EDITION	SWITCH	ELECTRONIC ARTS	206,614
	12	FIFA 22	PS5	ELECTRONIC ARTS	164,462
	13	THE LEGEND OF ZELDA: BREATH OF THE WILD	SWITCH	NINTENDO	160,975
	14	NEW SUPER MARIO BROS. U DELUXE	SWITCH	NINTENDO	157,774
	15	CALL OF DUTY: VANGUARD	PS4	ACTIVISION BLIZZARD	149,519
	16	GRAND THEFT AUTO V PREMIUM EDITION	PS4	TAKE-TWO INTERACTIVE	147,397
	17	SUPER MARIO PARTY	SWITCH	NINTENDO	145,846
	18	JUST DANCE 2022	SWITCH	UBISOFT	145,276
	19	51 WORLDWIDE GAMES	SWITCH	NINTENDO	140,496
	20	FIFA 21	PS4	ELECTRONIC ARTS	134,488

FIFA 22
ELECTRONIC ARTS
574,735



MARIO KART 8 DELUXE
NINTENDO
503,150



SUPER MARIO 3D WORLD + BOWSER'S FURY
NINTENDO
437,432


Sources: SELL data, from GSD/GameTrack panels at end 2021. Excluding bundles.

Sources: SELL data, from GSD/GameTrack panels at end 2021. Excluding bundles.

TOP 20 GAMES IN 2021 BY PLATFORM

PHYSICAL + DIGITAL MARKET IN VALUE



	4	ANIMAL CROSSING: NEW HORIZONS	SWITCH	NINTENDO	€20,574,408
	5	FIFA 22 - ULTIMATE EDITION	PS4	ELECTRONIC ARTS	€18,442,913
	6	POKÉMON BRILLIANT DIAMOND	SWITCH	NINTENDO	€17,659,543
	7	RING FIT ADVENTURE	SWITCH	NINTENDO	€17,617,654
	8	FIFA 22	PS5	ELECTRONIC ARTS	€13,936,199
	9	CALL OF DUTY: VANGUARD	PS4	ACTIVISION BLIZZARD	€13,927,630
	10	MARIO PARTY SUPERSTARS	SWITCH	NINTENDO	€13,275,776
	11	POKÉMON SPARKLING PEARL	SWITCH	NINTENDO	€10,471,216
	12	THE LEGEND OF ZELDA: SKYWARD SWORD HD	SWITCH	NINTENDO	€10,384,037
	13	THE LEGEND OF ZELDA: BREATH OF THE WILD	SWITCH	NINTENDO	€9,121,225
	14	FIFA 21	PS4	ELECTRONIC ARTS	€9,000,785
	15	CALL OF DUTY: BLACK OPS COLD WAR	PS4	ACTIVISION BLIZZARD	€8,954,546
	16	RATCHET & CLANK: RIFT APART	PS5	SONY INTERACTIVE ENTERTAINMENT	€8,365,540
	17	MINECRAFT: NINTENDO SWITCH EDITION	SWITCH	MICROSOFT	€8,145,944
	18	FIFA 22 ESSENTIAL EDITION	SWITCH	ELECTRONIC ARTS	€8,009,317
	19	NEW SUPER MARIO BROS. U DELUXE	SWITCH	NINTENDO	€7,741,493
	20	JUST DANCE 2022	SWITCH	UBISOFT	€7,206,436

FIFA 22
ELECTRONIC ARTS
€44,425,561



MARIO KART 8
DELUXE
NINTENDO
€24,437,798




SUPER MARIO 3D
WORLD + BOWSER'S
FURY
NINTENDO
€21,142,500

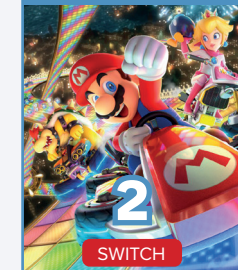
TOP 20 GAMES IN 2021 BY PLATFORM

PHYSICAL + DIGITAL MARKET IN VOLUME

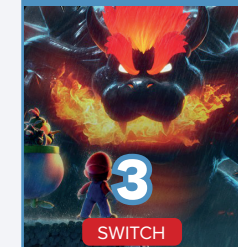


	4	ANIMAL CROSSING: NEW HORIZONS	SWITCH	NINTENDO	433,286
	5	POKÉMON BRILLIANT DIAMOND	SWITCH	NINTENDO	375,371
	6	MINECRAFT: NINTENDO SWITCH EDITION	SWITCH	MICROSOFT	301,907
	7	MARIO PARTY SUPERSTARS	SWITCH	NINTENDO	276,632
	8	FIFA 21	PS4	ELECTRONIC ARTS	271,777
	9	RING FIT ADVENTURE	SWITCH	NINTENDO	259,379
	10	FIFA 22 ESSENTIAL EDITION	SWITCH	ELECTRONIC ARTS	229,470
	11	CALL OF DUTY: VANGUARD	PS4	ACTIVISION BLIZZARD	226,604
	12	POKÉMON SPARKLING PEARL	SWITCH	NINTENDO	221,879
	13	FIFA 22 - ULTIMATE EDITION	PS4	ELECTRONIC ARTS	209,687
	14	THE LEGEND OF ZELDA: SKYWARD SWORD HD	SWITCH	NINTENDO	209,444
	15	GRAND THEFT AUTO V + CRIMINAL WORLD ENTRY PACK	PS4	TAKE-TWO INTERACTIVE	207,481
	16	FIFA 22	PS5	ELECTRONIC ARTS	206,384
	17	THE LEGEND OF ZELDA: BREATH OF THE WILD	SWITCH	NINTENDO	160,975
	18	CALL OF DUTY: BLACK OPS COLD WAR	PS4	ACTIVISION BLIZZARD	158,744
	19	NEW SUPER MARIO BROS. U DELUXE	SWITCH	NINTENDO	157,774
	20	JUST DANCE 2022	SWITCH	UBISOFT	151,128

FIFA 22
ELECTRONIC ARTS
765,526



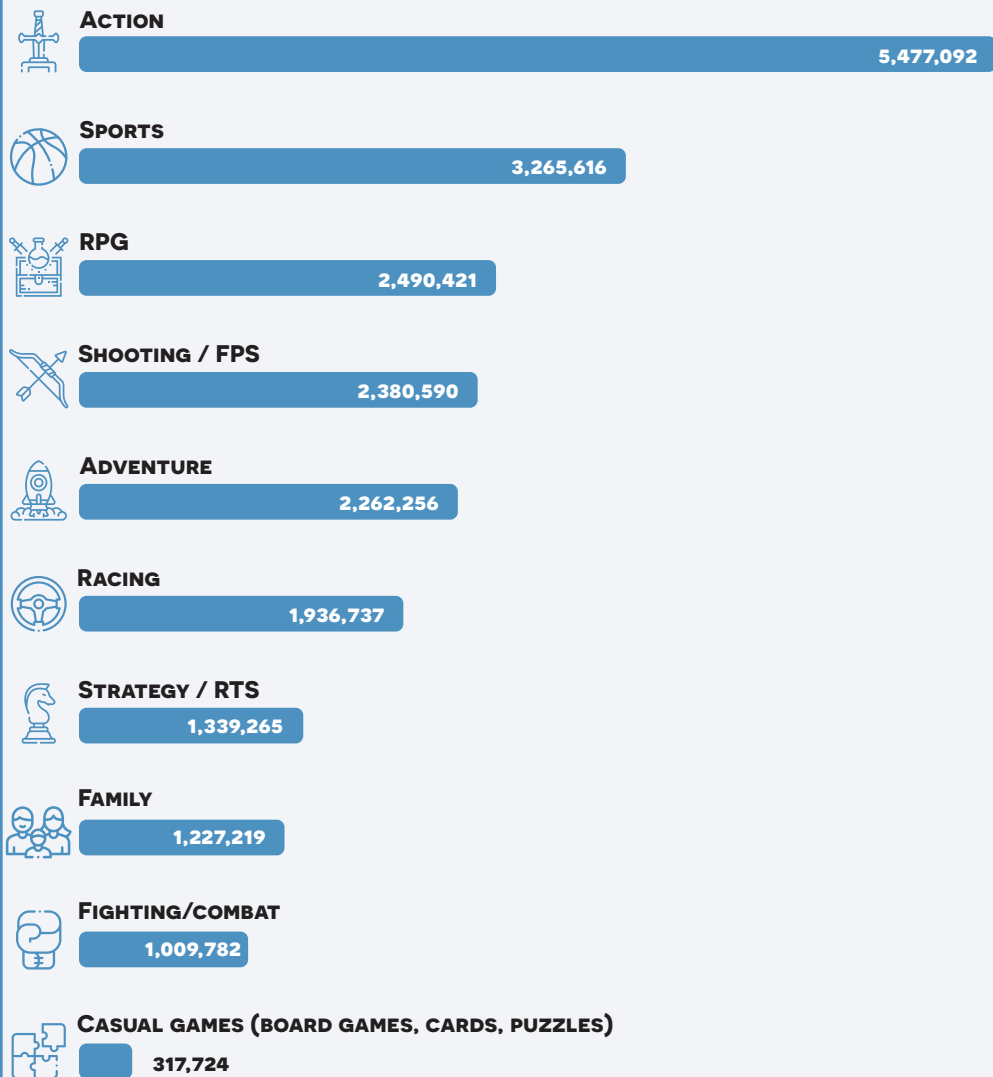
MARIO KART 8
DELUXE
NINTENDO
503,150



SUPER MARIO 3D
WORLD + BOWSER'S
FURY
NINTENDO
437,432

TOP 10 TYPES OF VIDEO GAMES BOUGHT IN 2021

PHYSICAL + DIGITAL MARKET IN VOLUME



Sources: SELL data, from GSD/GameTrack panels at end 2021. Excluding bundles. This listing does not include Nintendo digital sales data.



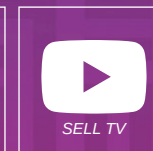
SYNDICAT
DES EDITEURS
DE LOGICIELS
DE LOISIRS

TOP WEEKLY SALES

Every Monday, discover
the top video game sales in France

SELL.FR

ON SOCIAL MEDIA



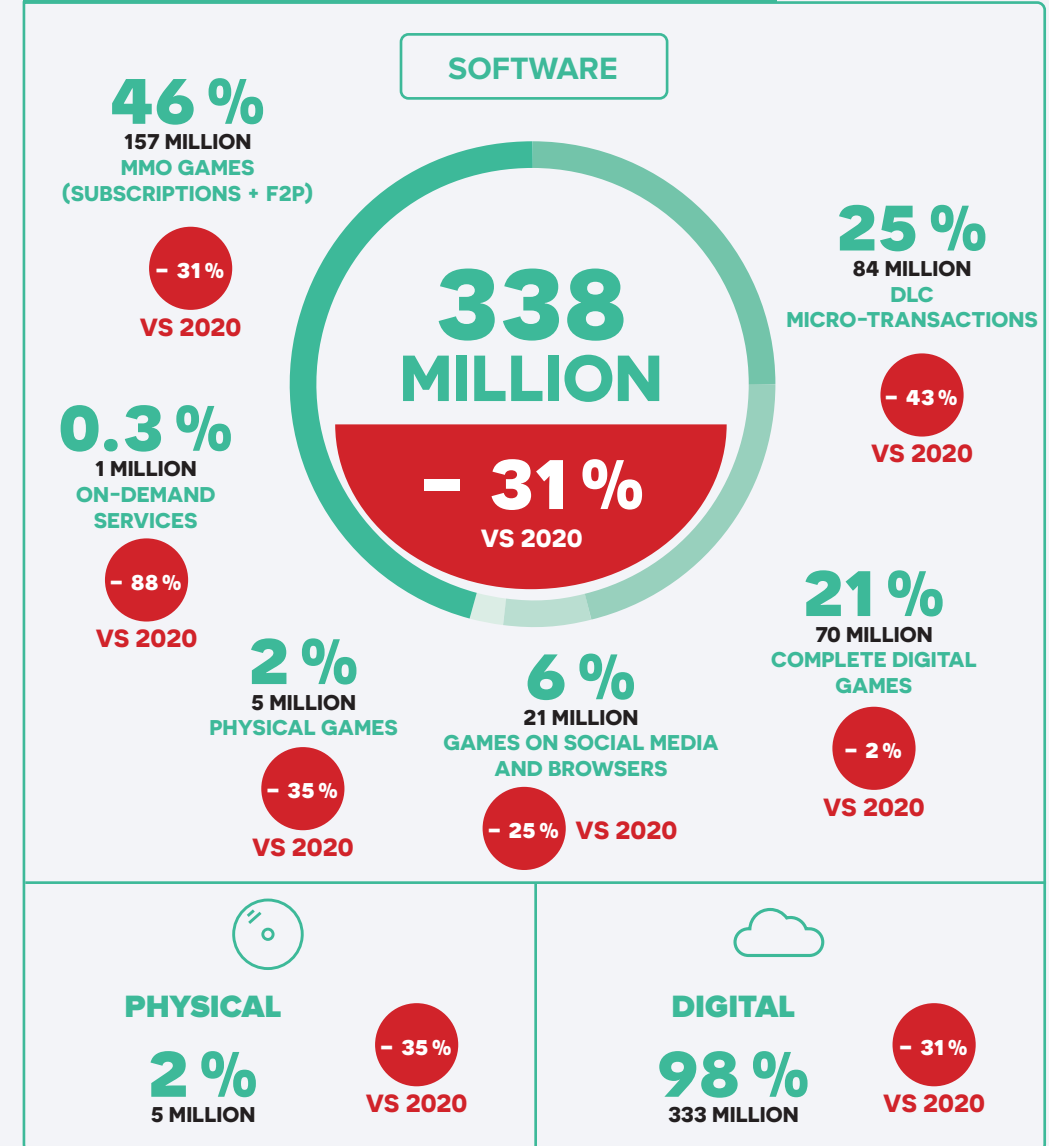
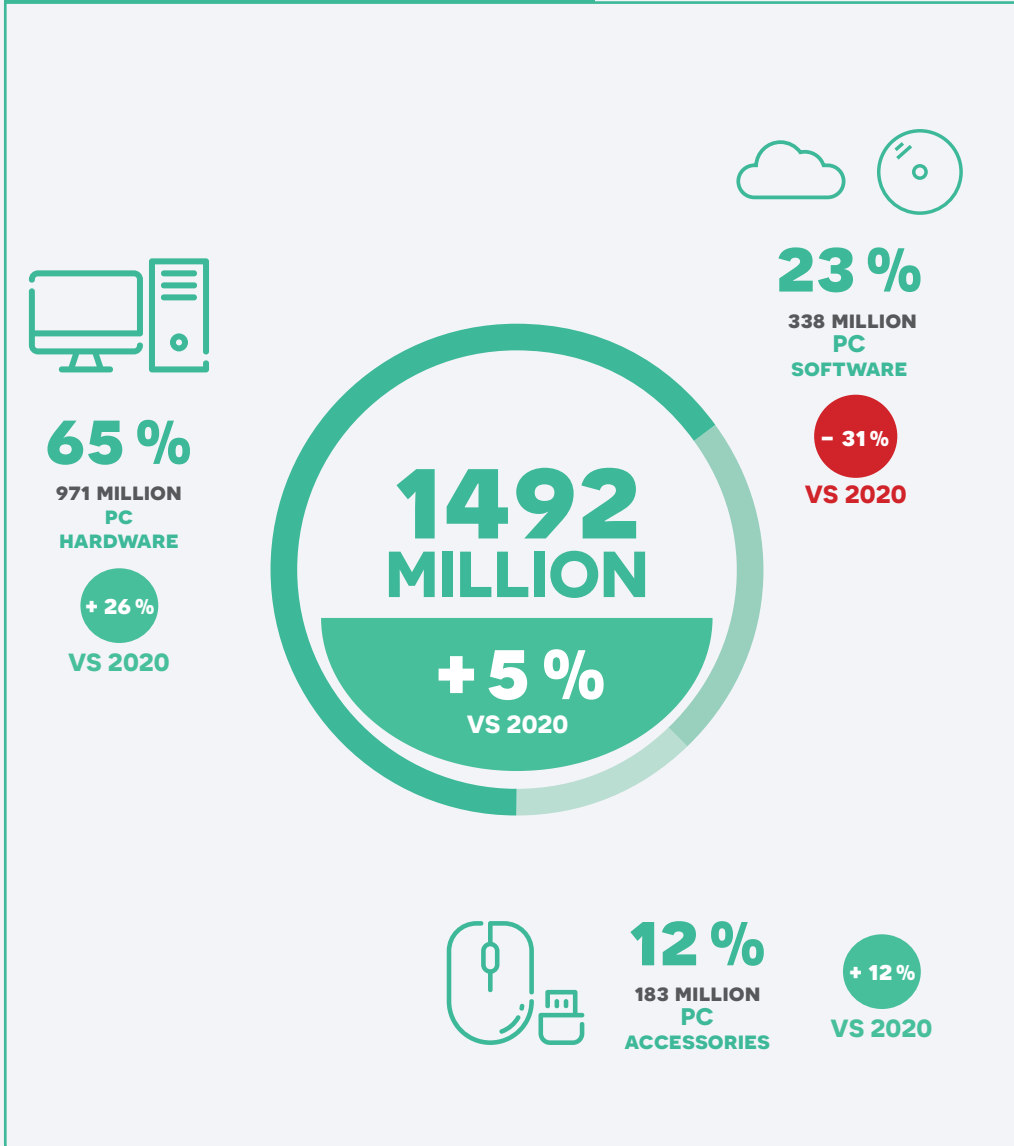
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GAMING PC ECOSYSTEM

GAMING PC ECOSYSTEM

BREAKDOWN OF 2021 TURNOVER IN EUROS

GROWTH AND BREAKDOWN OF 2021 SALES IN EUROS



SELL data, from GSD/GameTrack/IDC panels at end 2021. Excluding bundles.
Hardware: sales of PCs fitted with a high-performance graphics card.
Accessories: mice, keyboards, screens.

Sources: SELL data, from GSD/GameTrack panels at end 2021. Excluding bundles.

GAMING PC ECOSYSTEM

BREAKDOWN OF 2021 TURNOVER IN EUROS

HARDWARE

971 MILLION EUROS

+ 26%
VS 2020



GAMING PC DESKTOPS

306 MILLION

+ 29%

VS 2020



GAMING PC NOTEBOOKS

664 MILLION

+ 25%

VS 2020

ACCESSORIES

183 MILLION EUROS

+ 12%
VS 2020



SELL data, from GSD/IDC panels at end 2021. Excluding bundles.
Hardware: sales of PCs fitted with a high-performance graphics card.
Accessories: mice, keyboards, screens.

TOP 10 TYPES OF VIDEO GAMES BOUGHT IN 2021

PHYSICAL + DIGITAL MARKET IN VOLUME



ACTION

502,902



STRATEGY / RTS

458,349



RPG

278,853



SHOOTING / FPS

277,943



ADVENTURE

265,814



SPORTS

98,873



FIGHTING/COMBAT

80,301



RACING

55,250



CASUAL GAMES (BOARD GAMES/CARDS/PUZZLES)

42,443



FLIGHT SIMULATION

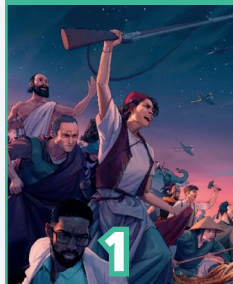
17,952

Sources: SELL data, from GSD/GameTrack panels at end 2021. Excluding bundles.

TOP 20 GAMES IN 2021

GAMING PC ECOSYSTEM

PHYSICAL + DIGITAL MARKET IN VALUE



1
HUMANKIND
SEGA
€1,534,013



2
FOOTBALL
MANAGER 2022
SEGA
€1,414,704



3
FARMING
SIMULATOR 22
KOCH MEDIA
€1,357,806

4	RED DEAD REDEMPTION 2	TAKE-TWO INTERACTIVE	€1,302,910
5	BACK 4 BLOOD	WARNER BROS. INTERACTIVE	€1,040,676
6	FOOTBALL MANAGER 2021	SEGA	€1,034,313
7	OUTRIDERS	SQUARE ENIX	€947,282
8	GRAND THEFT AUTO V	TAKE-TWO INTERACTIVE	€879,485
9	RESIDENT EVIL VILLAGE	CAPCOM	€689,063
10	TALES OF ARISE	BANDAI NAMCO ENTERTAINMENT	€645,831
11	CRUSADER KINGS III	PARADOX INTERACTIVE	€574,942
12	MICROSOFT FLIGHT SIMULATOR	MICROSOFT	€526,446
13	TOM CLANCY'S RAINBOW SIX SIEGE	UBISOFT	€487,185
14	SEKIRO: SHADOWS DIE TWICE	ACTIVISION BLIZZARD	€483,999
15	NIER REPLICANT VER.1.22474487139...	SQUARE ENIX	€467,176
16	TOTAL WAR: WARHAMMER II	SEGA	€447,953
17	DEMON SLAYER: KIMETSU NO YAIBA: THE HINOKAMI CHRONICLES	SEGA	€445,438
18	FARMING SIMULATOR 19	FOCUS ENTERTAINMENT	€393,307
19	BORDERLANDS 3	TAKE-TWO INTERACTIVE	€357,701
20	CALL OF DUTY: BLACK OPS III	ACTIVISION BLIZZARD	€336,330

Sources: SELL data, from GSD/GameTrack panels at end 2021. Excluding bundles.

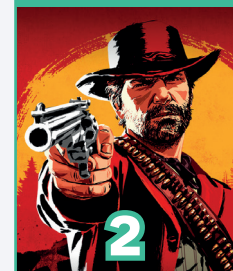
TOP 20 GAMES IN 2021

GAMING PC ECOSYSTEM

PHYSICAL + DIGITAL MARKET IN VOLUME



1
GRAND THEFT AUTO V
TAKE-TWO INTERACTIVE
55,392



2
RED DEAD REDEMPTION 2
TAKE-TWO INTERACTIVE
42,918



3
TOM CLANCY'S
RAINBOW SIX SIEGE
UBISOFT
35,093

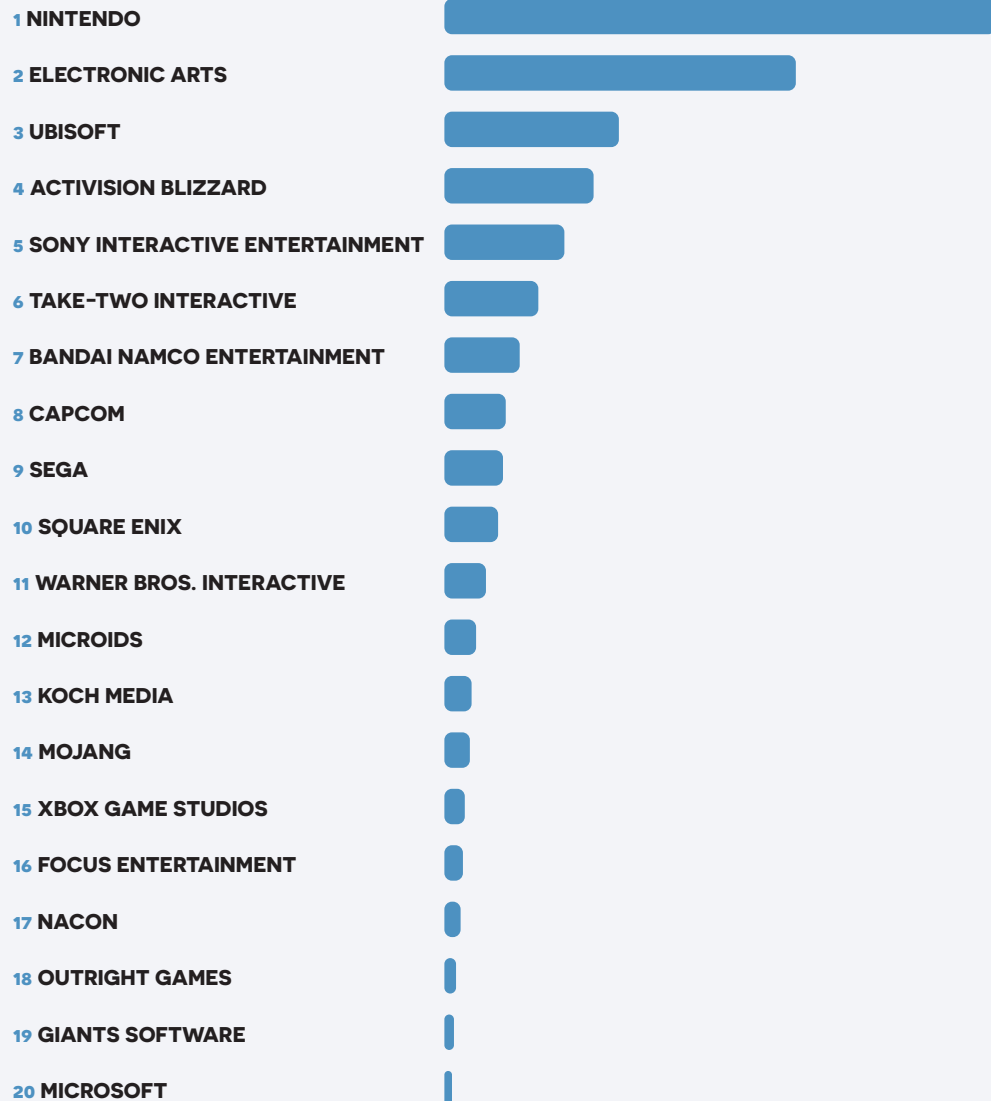
4	FARMING SIMULATOR 22	KOCH MEDIA	33,428
5	HUMANKIND	SEGA	29,965
6	FOOTBALL MANAGER 2022	SEGA	27,800
7	SID MEIER'S CIVILIZATION VI	TAKE-TWO INTERACTIVE	25,908
8	FOOTBALL MANAGER 2021	SEGA	23,665
9	FARMING SIMULATOR 19	FOCUS ENTERTAINMENT	22,000
10	METRO EXODUS	DEEP SILVER	17,897
11	OUTRIDERS	SQUARE ENIX	17,598
12	MIDDLE-EARTH: THE SHADOW OF WAR	WARNER BROS. INTERACTIVE	17,044
13	FAR CRY 5	UBISOFT	15,859
14	BORDERLANDS 3	TAKE-TWO INTERACTIVE	14,874
15	BACK 4 BLOOD	WARNER BROS. INTERACTIVE	14,654
16	UNO	UBISOFT	14,016
17	SHADOW OF THE TOMB RAIDER	SQUARE ENIX	13,948
18	LITTLE NIGHTMARES	BANDAI NAMCO ENTERTAINMENT	13,565
19	ASSASSIN'S CREED ODYSSEY	UBISOFT	12,827
20	TOTAL WAR: WARHAMMER II	SEGA	12,573

Sources: SELL data, from GSD/GameTrack panels at end 2021. Excluding bundles.

TOP 20 PUBLISHERS SOFTWARE CONSOLE + GAMING PC

TOP 20 PUBLISHERS SOFTWARE CONSOLE + GAMING PC

PHYSICAL + DIGITAL MARKET IN VALUE



PHYSICAL + DIGITAL MARKET IN VOLUME



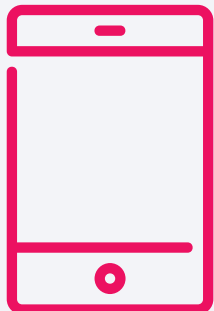
Sources: SELL data, from GSD/GameTrack panels at end 2021. Excluding bundles.
This listing does not include Nintendo digital sales data.

Sources: SELL data, from GSD/GameTrack panels at end 2021. Excluding bundles.
This listing does not include Nintendo digital sales data.

MOBILE ECOSYSTEM

GROWTH IN SALES FOR 2021

SOFTWARE

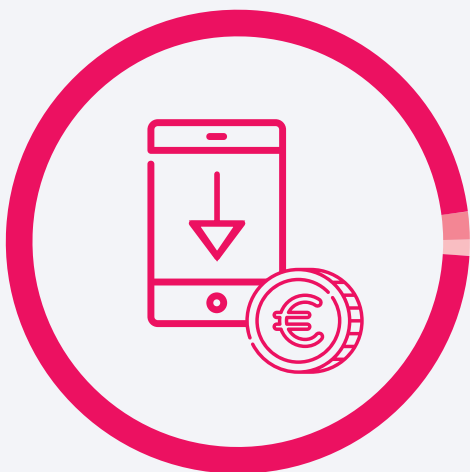


1411

MILLION
EUROS

- 1%
VS 2020

GROWTH AND BREAKDOWN OF 2021 SALES IN EUROS



98.4%

1,389 MILLION
FREE
APPS

- 0.5%

VS 2020

1.2%

17 MILLION
PAID
APPS

- 15%

VS 2020

0.4%

5 MILLION
GAMES ON SOCIAL
NETWORKS
AND BROWSERS

- 51%

VS 2020

TOP 10 GAMES IN 2021 MOBILE ECOSYSTEM

CONSUMER SPEND

1	MINECRAFT POCKET EDITION	MICROSOFT	
2	MONOPOLY BY MARMALADE	MARMALADE	
3	PLAGUE INC	NDEMIC CREATIONS	
4	FOOTBALL MANAGER 2021	SEGA SAMMY	
5	GRAND THEFT AUTO: SAN ANDREAS	TAKE TWO INTERACTIVE	
6	GEOMETRY DASH	ROBTOP	
7	TRUE SKATE	TRUE AXIS	
8	INCREDIBOX	SO FAR SO GOOD	
9	FOOTBALL MANAGER 2022	SEGA SAMMY	
10	FARMING SIMULATOR 20	GIANTS SOFTWARE	

PAID APPS BY DOWNLOADS

1	COIN MASTER	MOON ACTIVE	
2	CLASH OF CLANS	TENCENT	
3	BRAWL STARS	TENCENT	
4	CANDY CRUSH SAGA	ACTIVISION BLIZZARD	
5	POKÉMON GO	NIANTIC	
6	CLASH ROYALE	TENCENT	
7	HOMESCAPES	PLAYRIX	
8	DRAGON BALL Z DOKKAN BATTLE	BANDAI NAMCO	
9	RISE OF KINGDOMS	LILITH	
10	PUBG MOBILE	TENCENT	

FREE APPS BY DOWNLOADS

1	SUBWAY SURFERS	SYBO	
2	PROJECT MAKEOVER	APPROVIN	
3	COUNT MASTERS	ASCELLA MOBILE	
4	WATER SORT PUZZLE	IEC	
5	MAGIC TILES 3	AMANOTES	
6	CLASH ROYALE	TENCENT	
7	AMONG US!	INNERSLOTH	
8	ROBLOX	ROBLOX	
9	BRAWL STARS	TENCENT	
10	POKÉMON GO	NIANTIC	

40

CHAPTER 2

PROFILES OF FRENCH PLAYERS



VIDEO GAMES IN FRANCE

38.29 MILLION PLAYERS



Source : online SELL/Médiamétrie "French people and video games" survey carried out from 6th to 27th September 2021, with a sample of 4,016 web users aged 10 and over.
*Occasional player: player who says they play video games at least once a year.

VIDEO GAMES IN FRANCE

88%

ADULTS (18 AND OVER)
33.51 MILLION PEOPLE



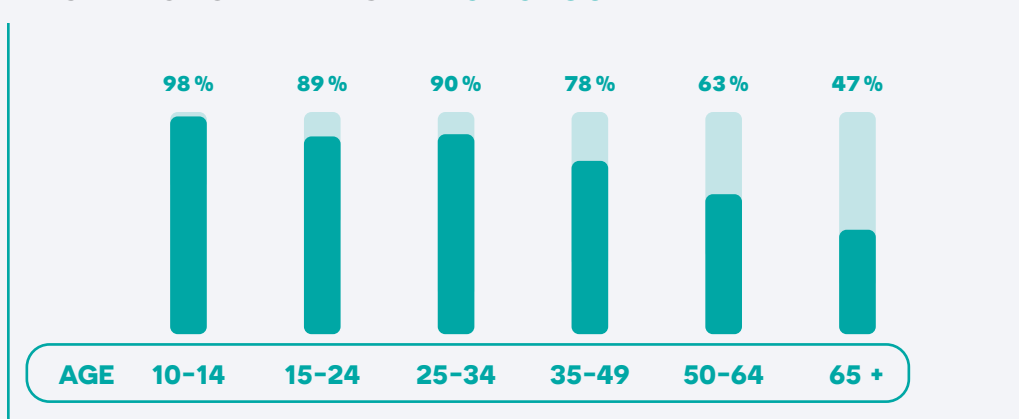
12%

CHILDREN (AGED 10-17)
4.78 MILLION PEOPLE

Source: online SELL/Médiamétrie "French people and Video Games" study carried out from 6th to 27th September 2021, with a sample of 4,016 web users aged 10 and over.

FRENCH PLAYERS

PERCENTAGE OF PLAYERS BY AGE GROUP



22%

PLAY SEVERAL TIMES A DAY

+2pts

VS 2020

33%

PLAY EVERY DAY OR NEARLY EVERY DAY

+1pt

VS 2020

13%

PLAY LESS OFTEN

9%

PLAY FROM TIME TO TIME (1 TO 3 TIMES A MONTH)

+3pts

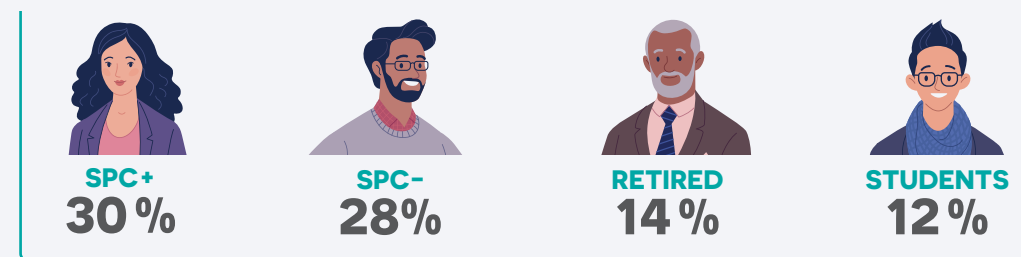
VS 2020

PLAYING FREQUENCY

Source: online SELL/Médiamétrie "French people and Video Games" study carried out from 6th to 27th September 2021, with a sample of 4,016 web users aged 10 and over.

FRENCH PLAYERS

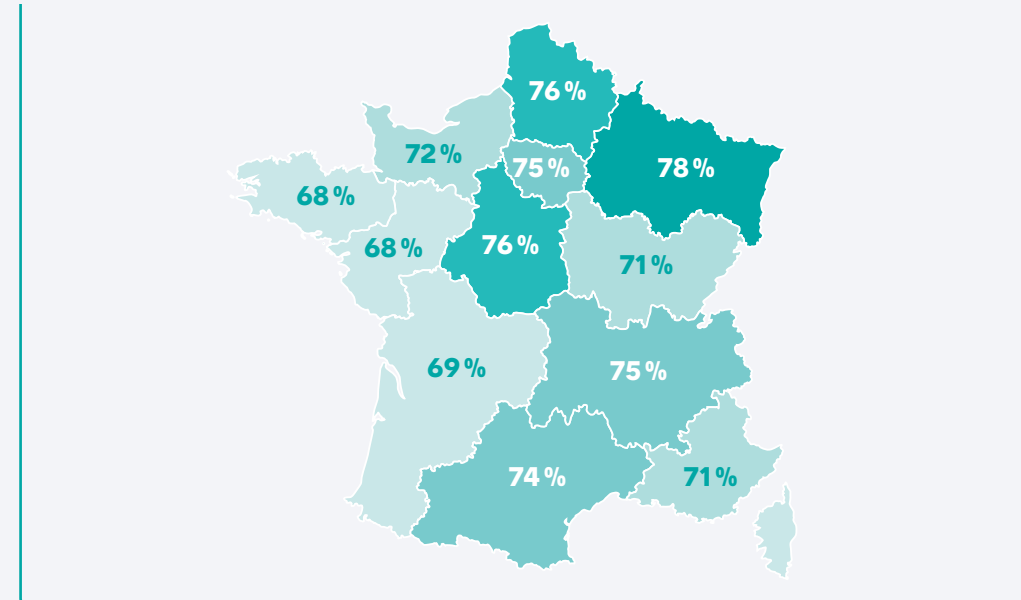
BREAKDOWN OF PLAYERS BY SOCIO-PROFESSIONAL CATEGORY



BREAKDOWN OF PLAYERS BY EDUCATION

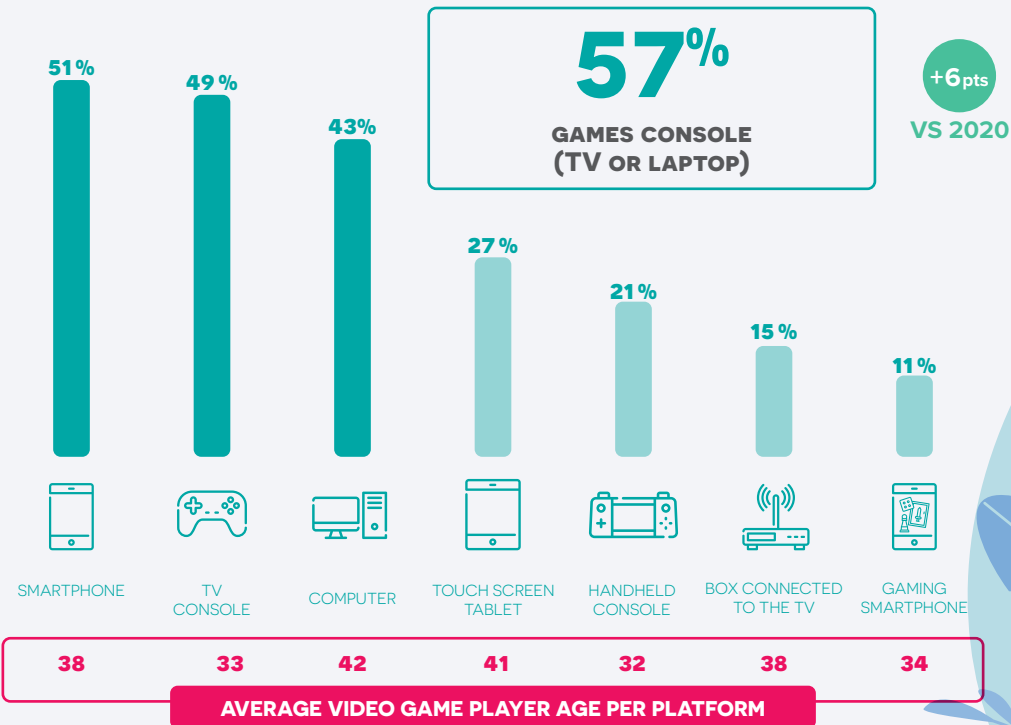


RATE OF PLAYERS IN EACH REGION

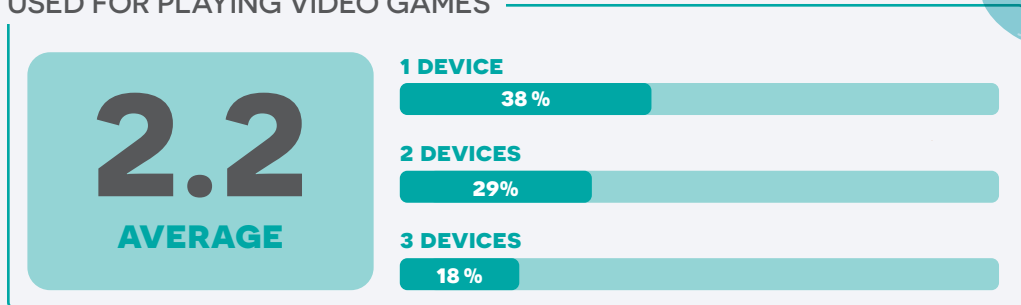


Source: online SELL/Médiamétrie "French people and Video Games" study carried out from 6th to 27th September 2021, with a sample of 4,016 web users aged 10 and over.

DEVICES USED TO PLAY VIDEO GAMES



NUMBER OF DEVICES USED FOR PLAYING VIDEO GAMES



Source: online SELL/Médiamétrie "French people and Video Games" study carried out from 8th to 27th September 2021, with a sample of 4,016 web users aged 10 and over.

CHAPTER 3

A RESPONSIBLE INDUSTRY

48



PARENT BEHAVIOUR TOWARDS VIDEO GAMES

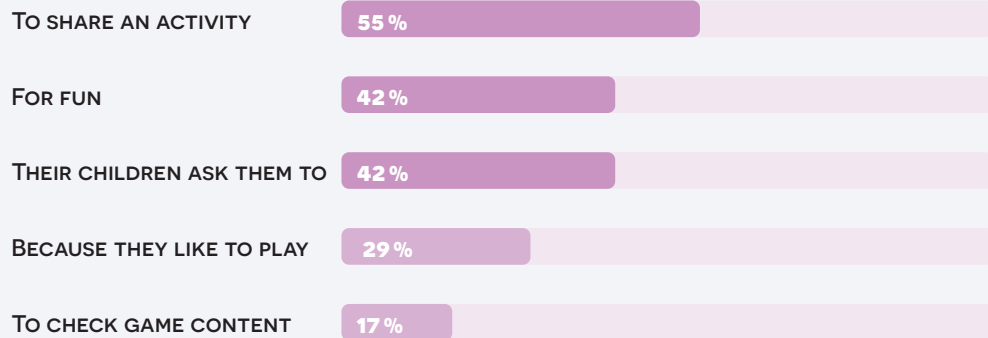
HOW ATTENTIVE PARENTS ARE TO THEIR CHILDREN'S VIDEO GAME PRACTICES



Source: online SELL/Médiamétrie "French people and Video Games" study carried out from 6th to 27th September 2021, with a sample of 4,016 web users aged 10 and over.

WHY DO PARENTS

PLAY VIDEO GAMES WITH THEIR CHILDREN?

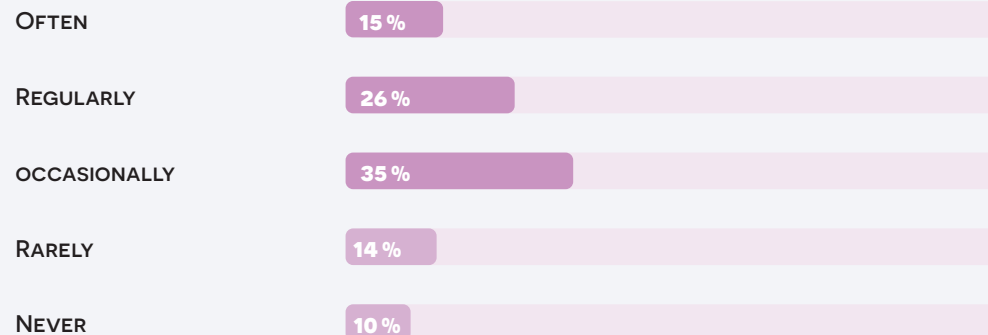


+11pts
VS 2020

77 % OF PARENTS SAY THEY PLAY WITH THEIR CHILDREN AT LEAST OCCASIONALLY

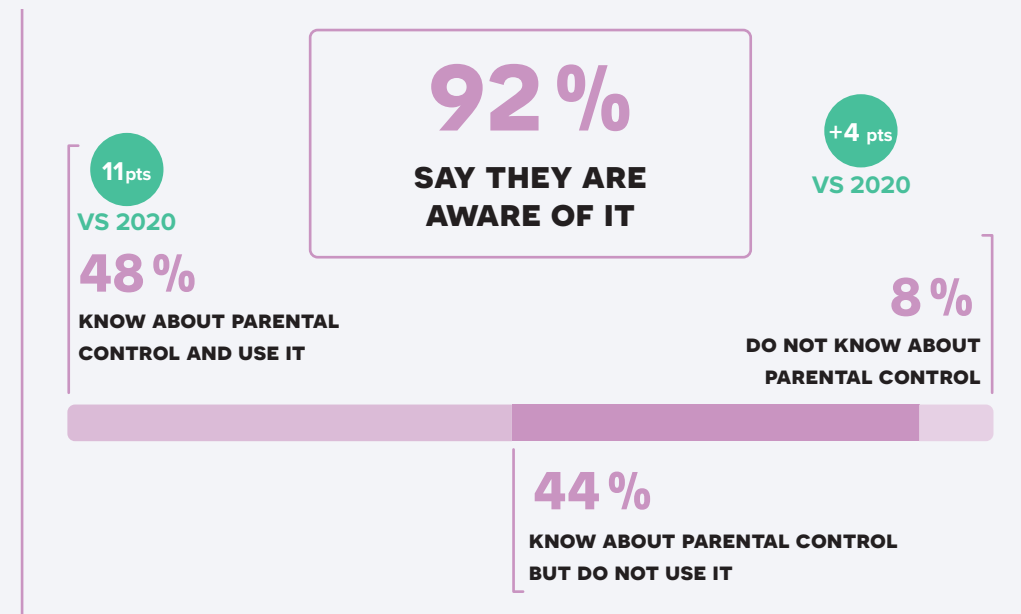
HOW OFTEN PARENTS

PLAY VIDEO GAMES WITH THEIR CHILDREN



PARENT BEHAVIOUR TOWARDS VIDEO GAMES

KNOWLEDGE AND USE OF PARENTAL CONTROL



KNOW ABOUT THE PEGI SYSTEM



THE ACT OF BUYING AND THE PEGI RATING SYSTEM

ATTITUDE TO THE PEGI RATING SYSTEM

PARENTS PAY ATTENTION TO THE PEGI SYSTEM

7pts
VS 2020
67%
YES



33%
NO

CHILDREN PAY ATTENTION TO THE PEGI SYSTEM

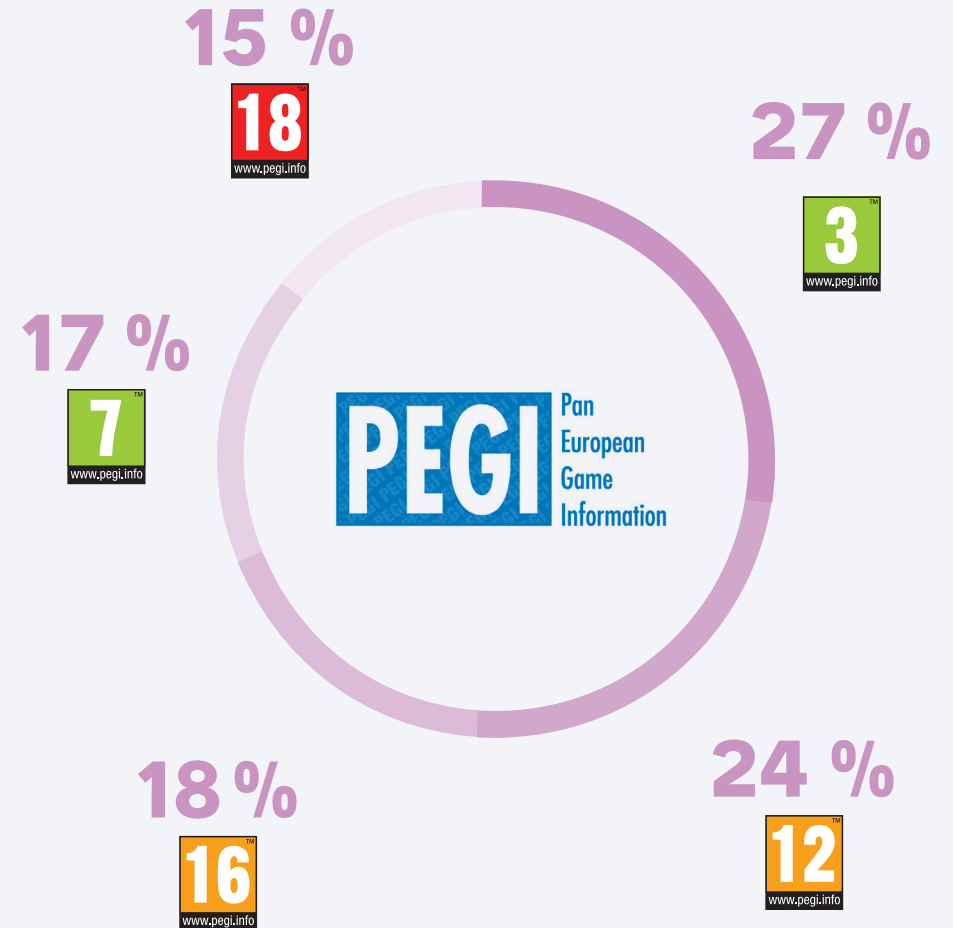
56%
YES



44%
NO

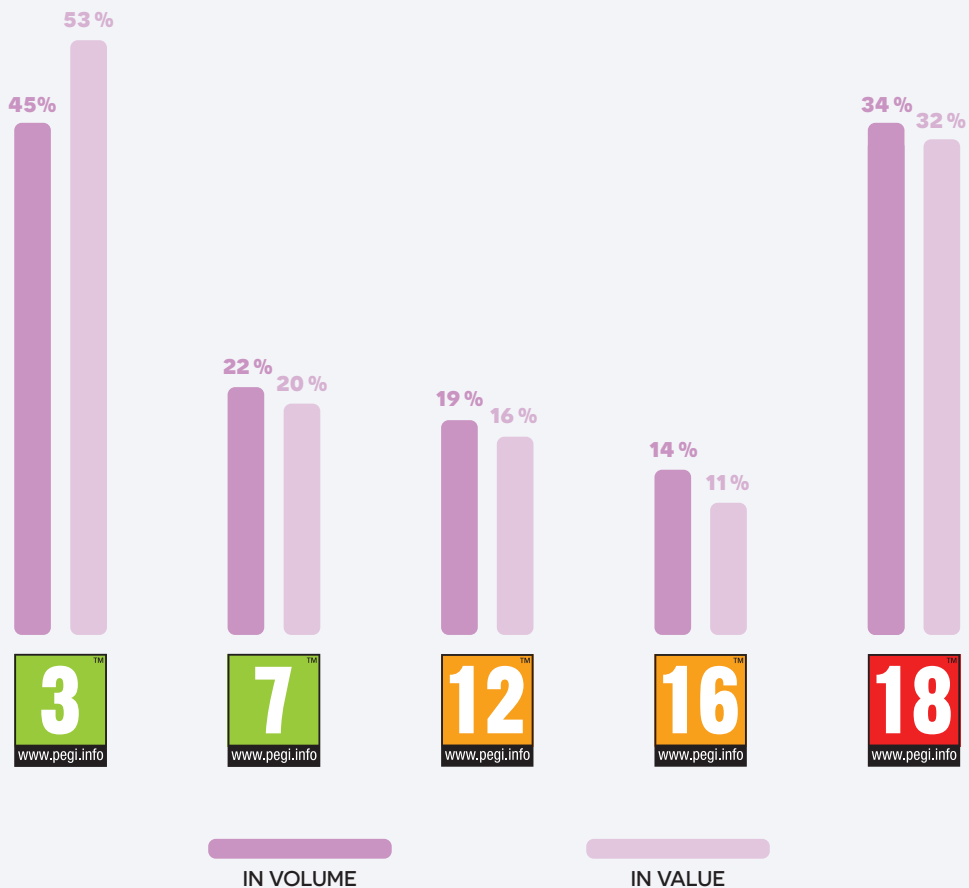
PEGI ANALYSIS OF THE 2021 OFFER

PHYSICAL + DIGITAL MARKETS



PEGI SALES ANALYSIS, MARKET SHARE IN 2021

PHYSICAL + DIGITAL MARKETS



Source: SELL data, from GSD/GameTrack panels at end 2021. Excluding bundles. This listing does not include Nintendo digital sales data.

TO HELP PARENTAL CONTROL

To help families establish rules for playing video games, all platforms have a parental control system. This parental control, which is part of all consoles and computers, enables parents to supervise the games their children play.

For several years, console manufacturers (Sony, Microsoft and Nintendo), Mac and Windows operating systems and also Google and most mobile terminals have been offering simple and effective solutions. Just a few minutes are required to configure the parental control and benefit from all its functions. These systems block access to games above a certain age or category in the PEGI rating system. They also control online purchases, limit web browsing, keep track of the time spent playing and can limit online interaction.

These systems strive to protect young audiences from content and behaviour unsuitable for their age. Nevertheless, it is essential for parents to keep an eye on what video games their children are playing, find out information about the games and take an interest in this hobby, playing, chatting with their children and more. The website 'PédaGoJeux.fr- Video games explained to parents' is a mine of information: understand the video game world, get information about the most talked about games, understand the PEGI symbols, best practices, etc.

HERE IS A LIST OF DIFFERENT EQUIPMENT AND SOFTWARE THAT HAS AN INTEGRATED PARENTAL CONTROL SYSTEM.



HOME CONSOLES

- Microsoft Xbox 360
- Microsoft Xbox One
- Microsoft Xbox Series
- Nintendo Wii
- Nintendo Wii U
- Nintendo Switch
- Sony PlayStation 3
- Sony PlayStation 4
- Sony PlayStation 5

HANDHELD CONSOLES

- Nintendo DS
- Nintendo 3DS
- Nintendo Switch Lite
- Sony PSP
- Sony PlayStation Vita

MOBILES

- Smartphones using Android
- Tablets using Android

COMPUTERS

- Windows operating system
- Windows operating Mac OS

WEB BROWSERS

- Google Chrome
- Apple Safari/WebKit
- Mozilla Firefox

PEGI

PAN EUROPEAN GAME INFORMATION

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

Launched in spring 2003, PEGI 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 video game publishers and developers throughout Europe. It is also used for 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 or 18 (age). They provide a reliable indication 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. The descriptors (see below) on the back cover indicate the main reasons why a game has a specific age rating.

	Violence	Bad Language	Fear	Sex	Drugs	Gambling	Discrimination	In-Game Purchases
3 www.pegi.info								
7 www.pegi.info	✓		✓					
12 www.pegi.info	✓	✓	✓	✓	✓			
16 www.pegi.info	✓	✓	✓	✓	✓			
18 www.pegi.info	✓	✓		✓	✓	✓	✓	✓

CREATED IN 2003	PRESENT IN 38 COUNTRIES	MORE THAN 35,000 GAMES ENDORSED	FEDERATING 2,600 MEMBER COMPANIES
------------------------	--------------------------------	--	--

3
www.pegi.info

Suitable for all ages. Mild violence in a comical context. Fantasy characters. No inappropriate content.

AGE LABELS

7
www.pegi.info

Unrealistic. Implicit violence, cartoon, fun. 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.

GAMBLING

This game encourages and/or teaches gambling.

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.

IN-GAME PURCHASES

The game allows the player to buy virtual goods with real money. Includes random content

VIOLENCE

This game contains violent scenes.

FEAR

This game may frighten young children.

CHAPTER 4

THE UNION OF VIDEO GAME PUBLISHERS



SYNDICAT
DES EDITEURS
DE LOGICIELS
DE LOISIRS

58

WHO WE ARE

The Union of Video Game Publishers is a trade body founded in 1995 and is made up of businesses from the video game sector specialised in publishing.

With 24 members, including 21 publishers and three associate members, SELL is the spokesperson for video game businesses in contact with organisations, the media, families and players. Publishers are specialists in video game promotion. They find and support talented studios and provide the distribution, marketing and advertising resources for their creations.

In this way, SELL's vocation is to federate these partners and encourage their work on agreed actions, expressing the richness, creativity and responsibilities of this industry. Its main missions are to promote video games and raise awareness of all players and their families about best practices, so they can enjoy playing with peace of mind.



OUR MISSIONS

REPRESENTING THE PUBLISHING INDUSTRY

As an industry spokesperson, SELL's primary vocation is to defend the interests of its members and, more generally, all of the video game sector. It is the key contact with public authorities, politicians and also innovative and cultural ecosystems.

To achieve this, SELL has invested in several organisations and working groups.

Interministerial working group made up of the General Directorate for Enterprise (DGE), the CNC, the National Video Game Union (SNJV), SELL and Ubisoft.

CNC: member of the Commission for Diversity in the Cultural Sector.

CSA: member of the Child Protection Commission.

Strategic Guidance for the National Digital Council.

ISFE (Interactive Software Federation of Europe): member of the Board of Directors.

France Esports: member of the Board of Directors.

INFORMING, PROTECTING AND SUPPORTING RESPONSIBLE INITIATIVES

Since its beginnings, SELL has been committed to a corporate social responsibility initiative to inform and protect the consumer.

PEGI: Created in 2003, PEGI (Pan European Game Information) is the European rating system for video games. It provides information on the content of each game and indicates a minimum advised playing age.

PédaGoJeuX: PédaGoJeuX is a collective created in 2008 by bringing together people from public bodies, the video games industry and associations. SELL is one of its founding members and works hard to develop it. The collective has the mission to raise awareness and help people understand video games. PédaGoJeuX guides parents by providing advice and information on the tools that will help them better support their children in this leisure activity, and supervise their gameplay. Every year SELL implements extensive information and awareness-raising campaigns on good practices. To extend the scope of PédaGoJeuX actions, it is developing a network of ambassadors across the entire country: state or charity organisations working in the fields of family awareness and information.



SELL places CSR at the heart of its initiatives: inclusion, diversity, digital sobriety and accessibility are priorities. Recent years have marked an increase in the actions implemented by our association.

The health crisis has led to a change in the way video games are viewed. As an increasingly popular 21st century medium and a leading sector among the major cultural industries, the video games industry also faces many challenges.

New issues have emerged in recent years that we must continue to address collectively.

Through the support of leading associations on these issues, the SELL wishes to affirm its commitment to a more diverse, inclusive and accessible industry.

We want to increase this dynamic and implement concrete actions for our members. The signing of the Charter for the Promotion of Diversity in December 2020 is

a good example of a concrete action taken by the whole eco-system, with the support of the public authorities, that we intend to continue with the implementation of pledges and commitments.

Digital sobriety is a subject of growing attention on which we are mobilized to better understand the impact of our industry, to better respond to this major challenge. SELL is currently working on the publication of a Guide detailing the challenges faced by the sector and presenting all of the levers for action, and good practices.

Video games are a universal and inter-generational leisure activity that help to bridge the digital divide. Similarly, accessible video games must become the norm.

The last two years have been a turning point for the image of video games and its commitment to these fundamental issues. The whole industry intends to continue its efforts!

STRUCTURING MARKET INFORMATION

SELL works with partners to provide the whole ecosystem with reliable studies on the video game market, video game player profiles and also video game players' purchasing and use habits. Several panels are used to carry out this analysis.

GSD Panel, Game Sales Data (distributors and digital) – ISFE/Sparkers;
GameTrack Panel (consumers) – ISFE/IPSOS;
App Annie Panel (mobile) – ISFE;
Other surveys: “The French and video games” – SELL/Médiamétrie.
IDC Panel (Hardware and Gaming PC Accessories) - SELL/IDC



PROMOTING VIDEO GAMES



SELL's mission is to promote video games, the industry's innovations and creativity to the general public, national and European stakeholders and also the media. It carries out these promotional actions through regular communication and most importantly via two major annual events:

IDEF: Interactive & Digital Entertainment Festival. Created in 2006, this professional event is organised by SELL for French stakeholders in the videogame and interactive leisure activity market. It takes place every year in the early summer. Developers, publishers, prop managers and distributors come together for business meetings to structure the end of the year. The 2022 edition will take place from 27 to 29 June at the Palais des Congrès Antibes - Juan Les Pins.

Paris Games Week - Since 2010, Paris Games Week has been inviting all video game players and their families and friends to come and celebrate the wealth, creativity and innovation of an entire industry. The 2019 edition welcomed 317,000 visitors and 194 exhibitors in the 80,000 m² of the Porte de Versailles exhibition centre.

It has quickly become a must-attend event in the French video game calendar, and every year it changes to reflect the evolution of a fast-growing industry, thanks in particular to the presence of major stakeholders such as console producers, publishers, design studios and accessory manufacturers. Noted and praised for its unique atmosphere and the quality of its entertainment, the show now brings together a community of passionate players who come to enjoy a festive and immersive experience.

THE BOARD OF DIRECTORS

CHRISTOPHE HAVART
BANDAI NAMCO ENTERTAINMENT

JULIE CHALMETTE
BETHESDA

DOMINIQUE COR
ELECTRONIC ARTS

JOHN BERT
FOCUS ENTERTAINMENT

JAMES REBOURS
KOCH MEDIA

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