JULY 2017

ESSENTIAL

VIDEO GAME NEWS

MARKET - CONSUMPTION - USE

S.E.L.L.

SYNDICAT DES EDITEURS DE LOGICIELS DE LOISIRS

JULY 2017

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MARKET - CONSUMPTION - USE

CONTENTS

CHAPTER 1

UNDERSTANDING THE VIDEO GAME MARKET: ESSENTIAL DATA

VIDEO GAMING: A LEISURE ACTIVITY FOR EVERYONE

52% OF FRENCH PEOPLE PLAY REGULARLY

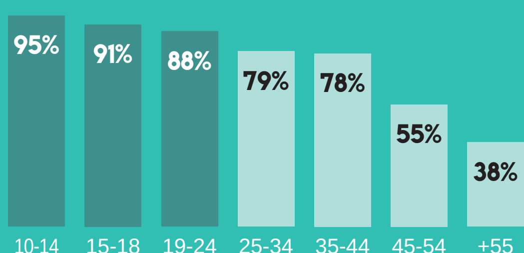
70% OF FRENCH PEOPLE PLAY AT LEAST OCCASIONALLY

54% OF MEN **46%** OF WOMEN

34 AVERAGE AGE OF A VIDEO GAMER

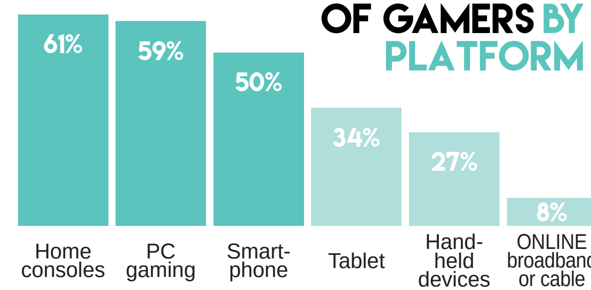
35 FOR MEN **32** FOR WOMEN

PERCENTAGE OF GAMERS BY AGE GROUP



HOW PEOPLE PLAY

BREAKDOWN OF GAMERS BY PLATFORM



28% PLAY EVERY DAY OR NEARLY EVERY DAY

25% PLAY REGULARLY (at least twice a week)

28% PLAY OCCASIONALLY (2 to 3 times a year)

21% PLAY FROM TIME TO TIME (2 to 3 times a month)

Source: SELL / GFK "The French and Video gaming" survey
Based on 1,002 people aged between 10 and 65, October 2016

VIDEO GAMING: A LEISURE ACTIVITY FOR EVERYONE

The history of video gaming in France dates back to the 1980s. The last twenty years have seen the industry and how it is used change dramatically. Gaming has slowly become generalised, entering every French home.

2005 — 29% REGULAR GAMERS

2016 — 52% REGULAR GAMERS

In the early 2000s, **only 20%** of the French population said they played video games, a large proportion being men with an average age of **21**. Seventeen years later - and this has been proven in the last few years - one out of every two French people now say they play video games with almost equal sexual parity and an average age way over 30.

Source: GfK 2005 Gamers Study and GfK/Sell Study, October 2016

FRENCH PEOPLE AND THEIR HABITS

FRENCH HABITS (IN HOURS PER WEEK)		GAMER HABITS (IN HOURS PER WEEK)
28.1	SURF THE WEB + 0.2 hours	28.3
21.4	WATCH TELEVISION - 3.3 hours	18.1
9.1	LISTEN TO THE RADIO - 0.7 hours	8.4
7.5	LISTEN TO MUSIC + 1.5 hours	9
4.3	WATCH VIDEOS (DVD, BLU-RAY, VOD, STREAMING) + 1.1 hours	5.5
3.8	READ BOOKS - 0.2 hours	3.6
3.7	PLAY ON THE SMARTPHONE AND TABLET + 1.4 hours	5.1
3.5	PLAY ON THE CONSOLE AND PC + 1.5 hours	5
2.6	READ NEWSPAPERS AND JOURNALS + 0 hours	2.6
1.1	GO TO THE CINEMA + 0.2 hours	1.3

Source: SELL / GFK "The French and Video gaming" survey based on 1,002 people aged between 10 and 65, October 2016

2016 MARKET REPORT

SALES FROM THE FRENCH VIDEO GAME MARKET

+4%
MARKET GROWTH

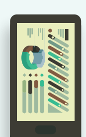
3.46 BILLION EUROS

HARDWARE MARKET
+ SOFTWARE
(PHYSICAL AND DIGITAL)
+ ACCESSORIES
+ MOBILE GAMING

63%

CONSOLE
Ecosystem
Hardware, software and accessories

8%



MOBILE GAMING
Ecosystem

29%

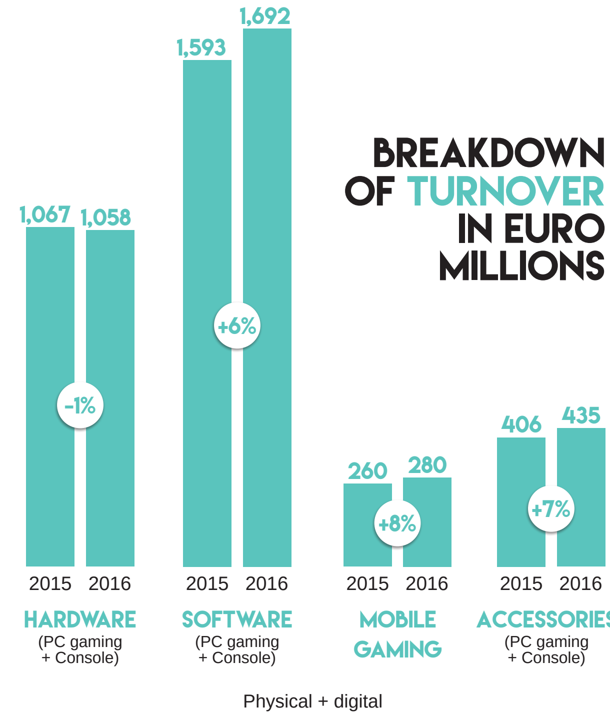
PC GAMING*
Ecosystem
Hardware, software and accessories

***Hardware** (*sales of PCs fitted with high-performance graphics cards*), **software** (*physical, digital*) and **accessories** (*mouse, keyboard, screen*) **for PC gaming**

Source: SELL estimation, using GfK panel data at end 2016

CLOSE-UP: MARKET SEGMENTS

BREAKDOWN OF TURNOVER IN EURO MILLIONS



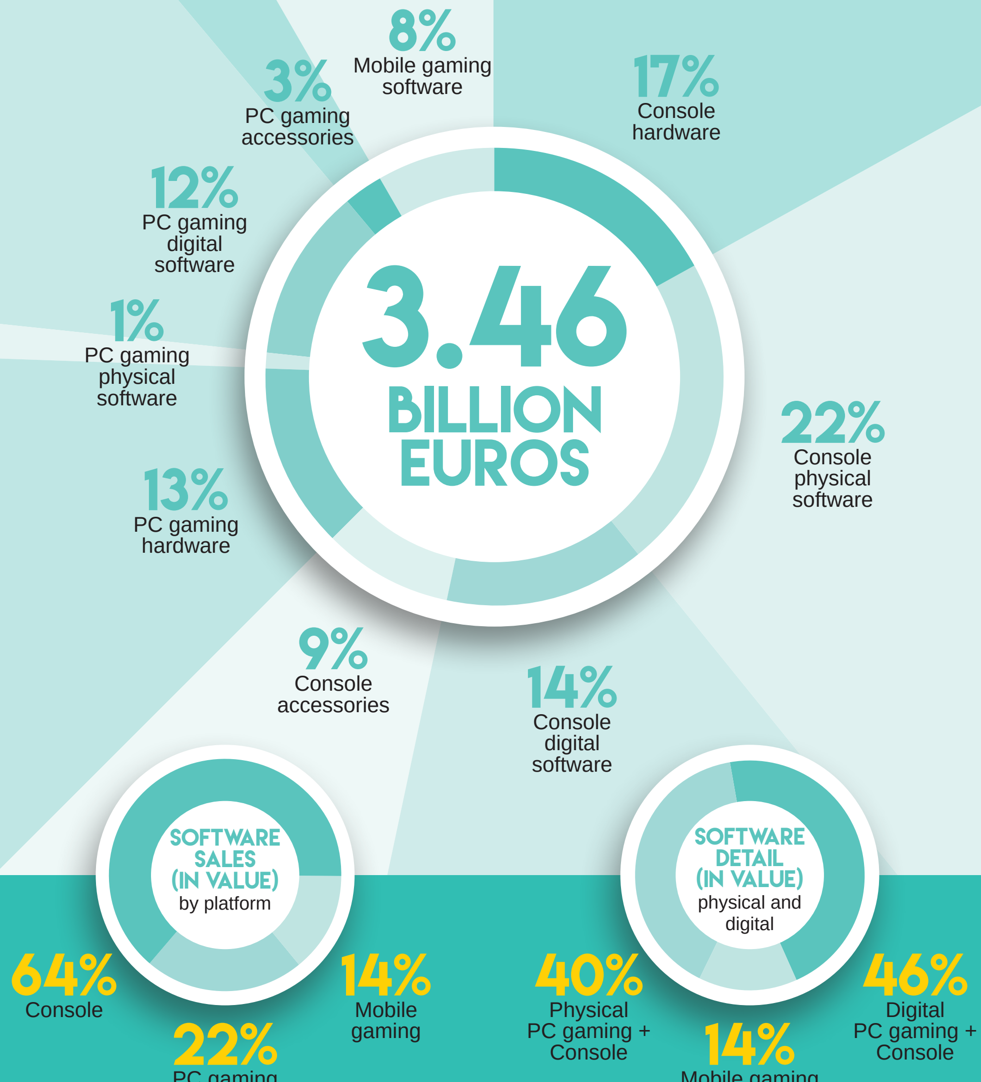
+4%

TURNOVER FOR GLOBAL MARKET

[CONSOLES + PC GAMING + MOBILE GAMING (PHYSICAL AND DIGITAL MARKET)]

Source: SELL estimation, using GfK panel data at end 2016

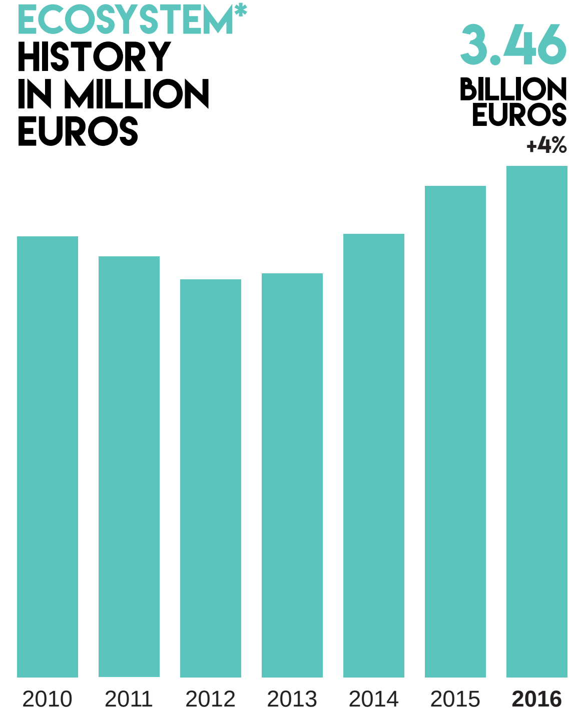
CLOSE-UP MARKET SEGMENTS



Source: SELL estimation, using GfK panel data at end 2016

DEVELOPMENT IN SALES

TOTAL ECOSYSTEM* HISTORY IN MILLION EUROS



*Ecosystem Console + PC gaming + Mobile gaming, physical + digital

Source: SELL estimation, using GfK panel data at end 2016

CHAPTER 2

THE 2017 FRENCH VIDEO GAME MARKET

2017 MARKET REPORT

SALES FROM THE FRENCH VIDEO GAME MARKET

+14% MARKET GROWTH

1.29 BILLION EUROS

MARKET FOR HARDWARE + SOFTWARE
(PHYSICAL AND DIGITAL)
+ ACCESSORIES
+ MOBILE GAMING

61%

CONSOLE
Ecosystem
Hardware, software and accessories

9%

MOBILE GAMING
Ecosystem

30%

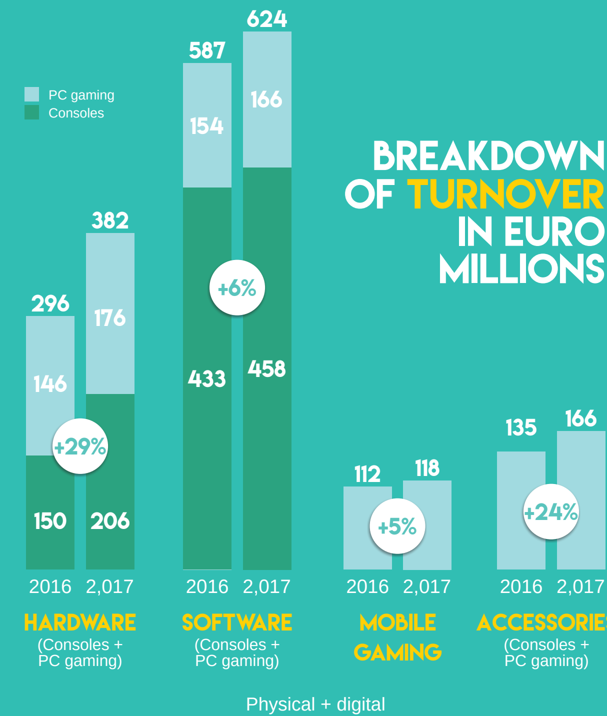
PC GAMING*
Ecosystem
Hardware, software and accessories

***Hardware** (*sales of PCs fitted with high-performance graphics cards*), **software** (*physical, digital*) and **accessories** (*mouse, keyboard, screen*) **for PC gaming.**

Source: SELL estimate, using GfK panel data,
*Market data W01-W22 2017 vs W01-W22 2016

CLOSE-UP: MARKET SEGMENTS*

BREAKDOWN OF TURNOVER IN EURO MILLIONS



+14%

TURNOVER FOR GLOBAL MARKET

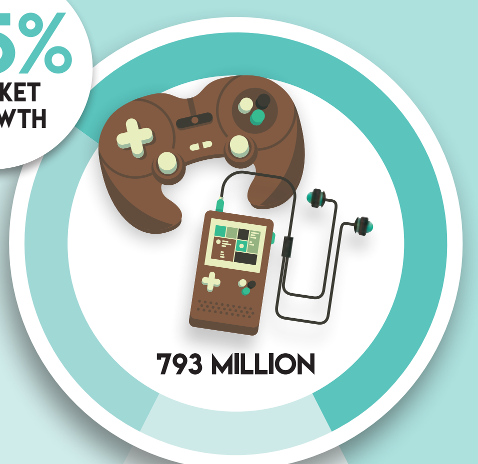
[CONSOLES + PC GAMING
+ MOBILE GAMING
(PHYSICAL AND DIGITAL MARKET)]

Source: SELL estimate, using GfK panel data,
*Market data W01-W22 2017 vs W01-W22 2016

CONSOLE ECOSYSTEM

BREAKDOWN OF 2017 TURNOVER IN EURO MILLIONS*

+15% MARKET GROWTH



26%
206 MILLION
CONSOLE HARDWARE

58%
458 MILLION
CONSOLE SOFTWARE
PHYSICAL + DIGITAL

16%
129 MILLION
CONSOLE ACCESSORIES

Source: SELL estimate, using GfK panel data,
*Market data W01-W22 2017 vs W01-W22 2016

DEVELOPMENT IN SALES*

HARDWARE (HOME CONSOLES + HANDHELDS) — +37% — 206 MILLION EUROS

TOTAL ESTABLISHED BASE 2017** 40.4 MILLION CONSOLES
52% OF FRENCH HOMES HAVE VIDEO GAME CONSOLES

SOFTWARE (PHYSICAL AND DIGITAL) — +6% — 458 MILLION EUROS

ACCESSORIES — +22% — 129 MILLION EUROS

TOP 5 SEGMENTS

01	+1 PLACE	PREPAID CARDS
02	-1 PLACE	CONTROLLERS
03	=	HEADSETS
04	+1 PLACE	VIRTUAL REALITY
05	-1 PLACE	HYBRID TOYS

**Includes: home consoles, handheld consoles and retrogaming

Source: SELL estimate, using GfK panel data,
*Market data W01-W22 2017 vs W01-W22 2016

PC ECOSYSTEM

BREAKDOWN OF 2017 TURNOVER IN EURO MILLIONS*

+15% MARKET GROWTH

47% 176 MILLION PC GAMING HARDWARE

43% 166 MILLION PC GAMING SOFTWARE PHYSICAL + DIGITAL

10% 37 MILLION PC GAMING ACCESSORIES

*PC gaming includes: Software (physical/digital), Hardware (sales of PCs fitted with high-performance graphics cards), Accessories (mouse, keyboard, screen) for PC gaming
Source: SELL estimate, using GfK panel data
*Market data W01 - W22 2017 vs W01 - W22 2016.

DEVELOPMENT IN SALES*

HARDWARE

+20%

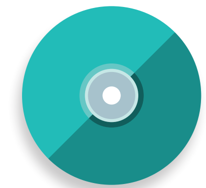
PC GAMING HARDWARE 176 MILLION EUROS

DESKTOP PC 38 MILLION EUROS

LAPTOP PC 138 MILLION EUROS

SOFTWARE

(PHYSICAL AND DIGITAL)



165 MILLION EUROS +7%

ACCESSORIES

+28%

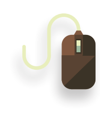
37 MILLION EUROS

TOP 3 SEGMENTS

+30%

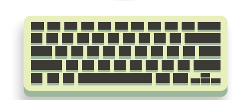
GAMING MONITOR

+25%



GAMING MOUSE

+27%



GAMING KEYBOARD

Source: SELL estimate, using GfK panel data,
*Market data W01-W22 2017 vs W01-W22 2016

2017

PERSPECTIVES

WILL BE A HISTORIC YEAR FOR THE VIDEO GAME MARKET!

The very positive perspectives announced in February 2017 are confirmed.

With 14% market growth for this first period and the wealth of new innovations revealed at E3 for release in the second half of the year, the sector is preparing for a record year, bolstered by the three ecosystems: consoles, PC gaming and mobile gaming devices. The wealth and energy of each ecosystem creates a virtuous circle for all segments: hardware, software and accessories. The unequalled offer for gamers and the development of different gaming modes are slowly making the boundaries between gaming practices disappear; this marks the opening of a new era in video gaming.

CHAPTER 3

BUYING HABITS IN FRANCE

GfK

SPECIFIC CHARACTERISTICS VS CLASSIC CONSUMER PANELS?

A consumer panel is a **permanent** and **representative** sample of the French population which **systematically** declares all its purchases in the categories concerned.

SAMPLE

15,000 PANELLISTS OVER THE AGE OF 10

representative of the French population, and qualified by their multimedia equipment, media habits, etc.

ANALYSIS SCOPE

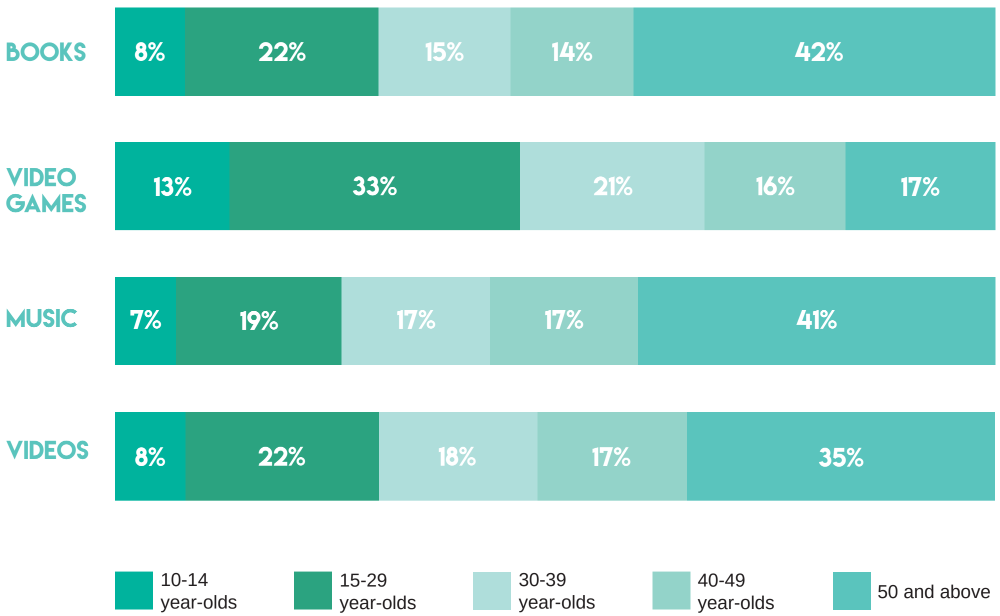
Books, video games, music, videos, cinema. New, second-hand and digital purchases.

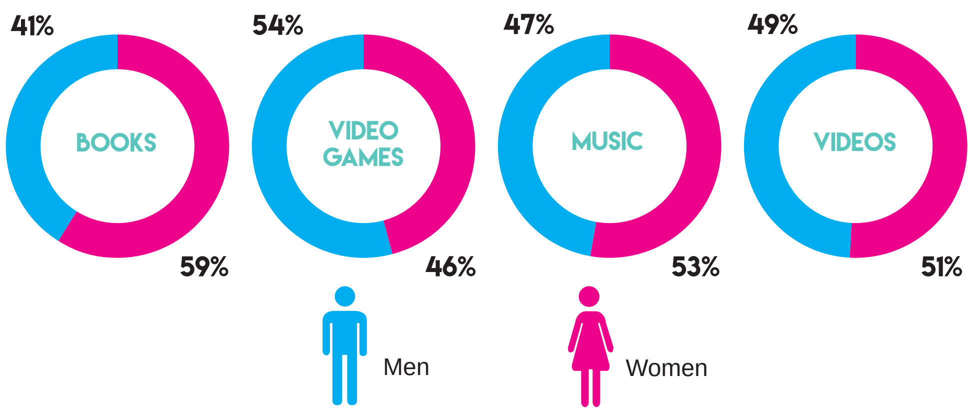
HISTORY

Data available since **JULY 2013**, for a broad total panel.

BUYERS OF CULTURAL GOODS IN FRANCE IN 2016

As a percentage of buyers

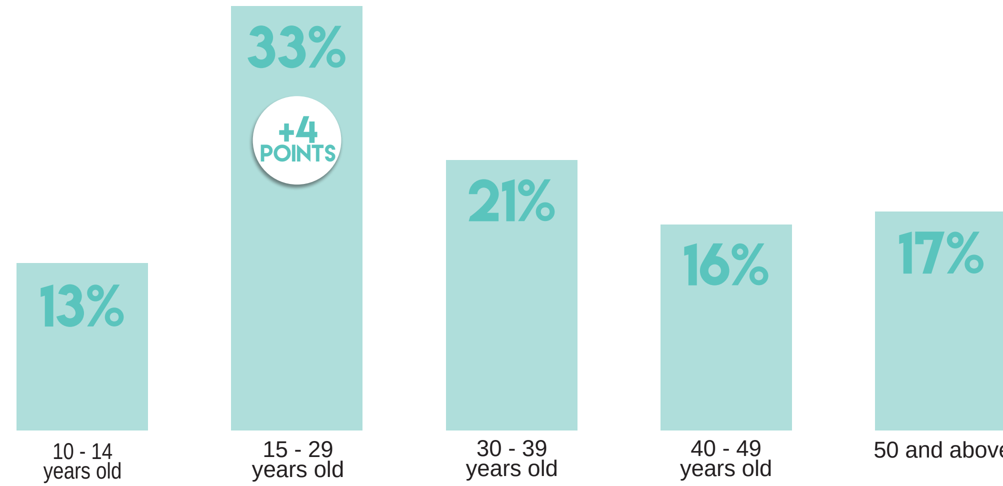




Source: Source: GFK – ENTERTAINMENT Consumer Panel

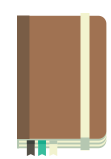
THE VIDEO GAME BUYER IN FRANCE IN 2016

As a percentage of buyers



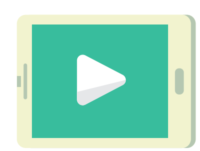
67% OF VIDEO GAME BUYERS ARE UNDER 40

AS A COMPARISON:



BOOKS

44%



VIDEOS

48%

MUSIC

43%

Source: Consumer panel aged 10 and above, GfK France, full year 2016

SNAPSHOT OF A VIDEO GAME BUYER

As a percentage of buyers

54%
men

46%
women

56%
bought for another person

44%
purchase for themselves

58%
with children

42%
without children

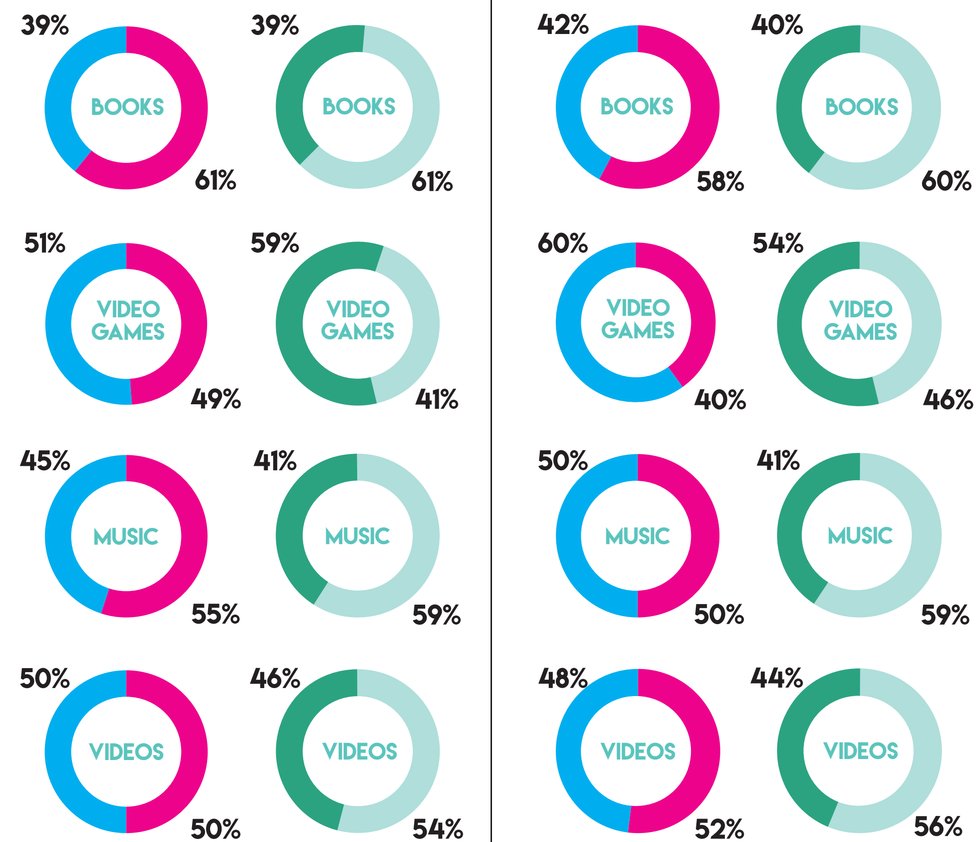
Source: Consumer panel 10 and older, GfK France, full year 2016

THE BUYER IN STORE/ ONLINE IN 2016

As a percentage of buyers

IN-STORE PURCHASES

ONLINE PURCHASES



Men

Women

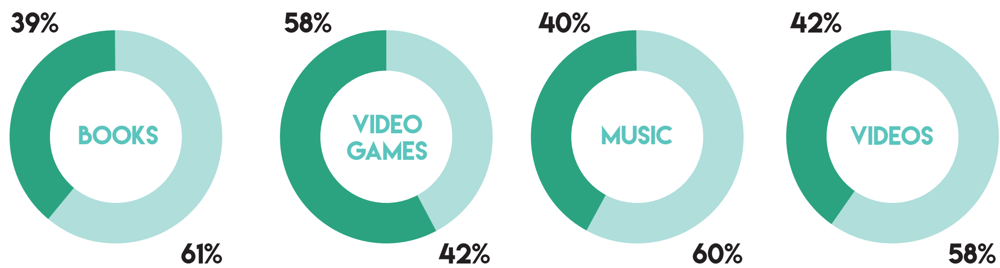
Individuals living with children

Individuals not living with children

Source: Source: GFK – ENTERTAINMENT Consumer Panel

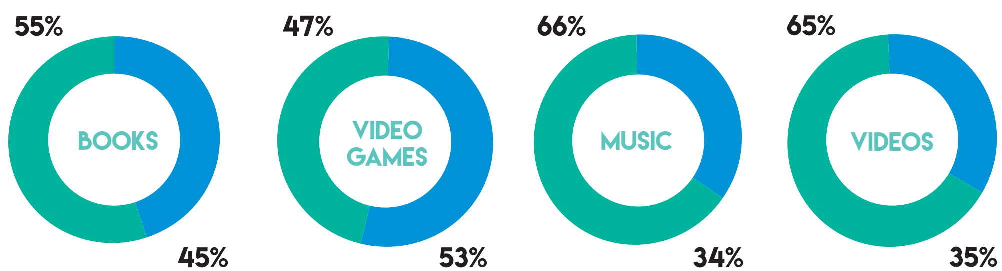
VIDEO GAMES: MOSTLY GIVEN AS PRESENTS

As a percentage of buyers

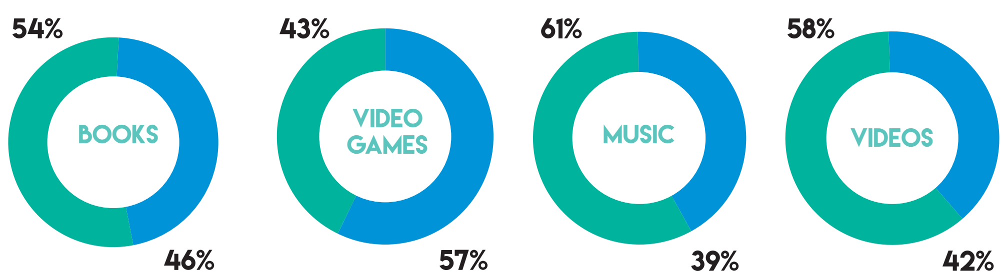


Individuals living with children
Individuals not living with children

ONLINE PURCHASES (MARKET SHARE AS % OF SPENDING)



IN-STORE PURCHASES (MARKET SHARE AS % OF SPENDING)

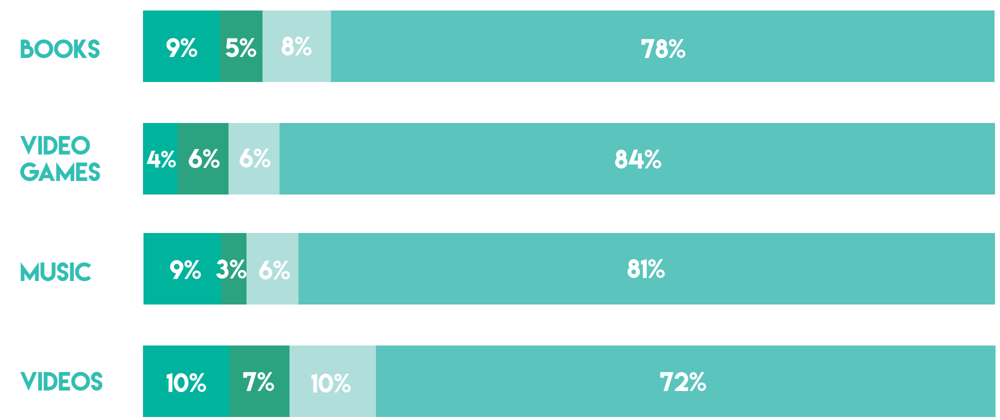


Purchase for oneself
Purchase for another person

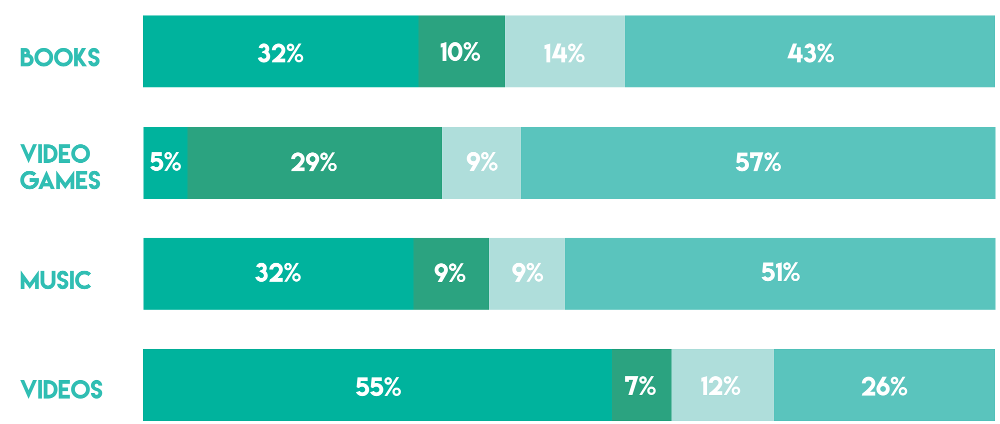
Source: Source: GFK – ENTERTAINMENT Consumer Panel

INTENTION BY TYPE OF PRODUCT / CHANNEL

ONLINE PURCHASES (AS % OF PURCHASES BY VOLUME)



IN-STORE PURCHASES (AS % OF PURCHASES BY VOLUME)



Impulse purchase
Intentional in-store purchase
Intentional genre purchase
Intentional game purchase

Source: Source: GFK – ENTERTAINMENT Consumer Panel

CONSOLE GAME / PC GAME: TWO COMPLEMENTARY WORLDS

93%

OF HOMES WITH CONSOLES
ALSO HAVE A PC

63%

OF HOMES WITH A PC
ALSO HAVE A CONSOLE

AVERAGE AGE OF PURCHASERS

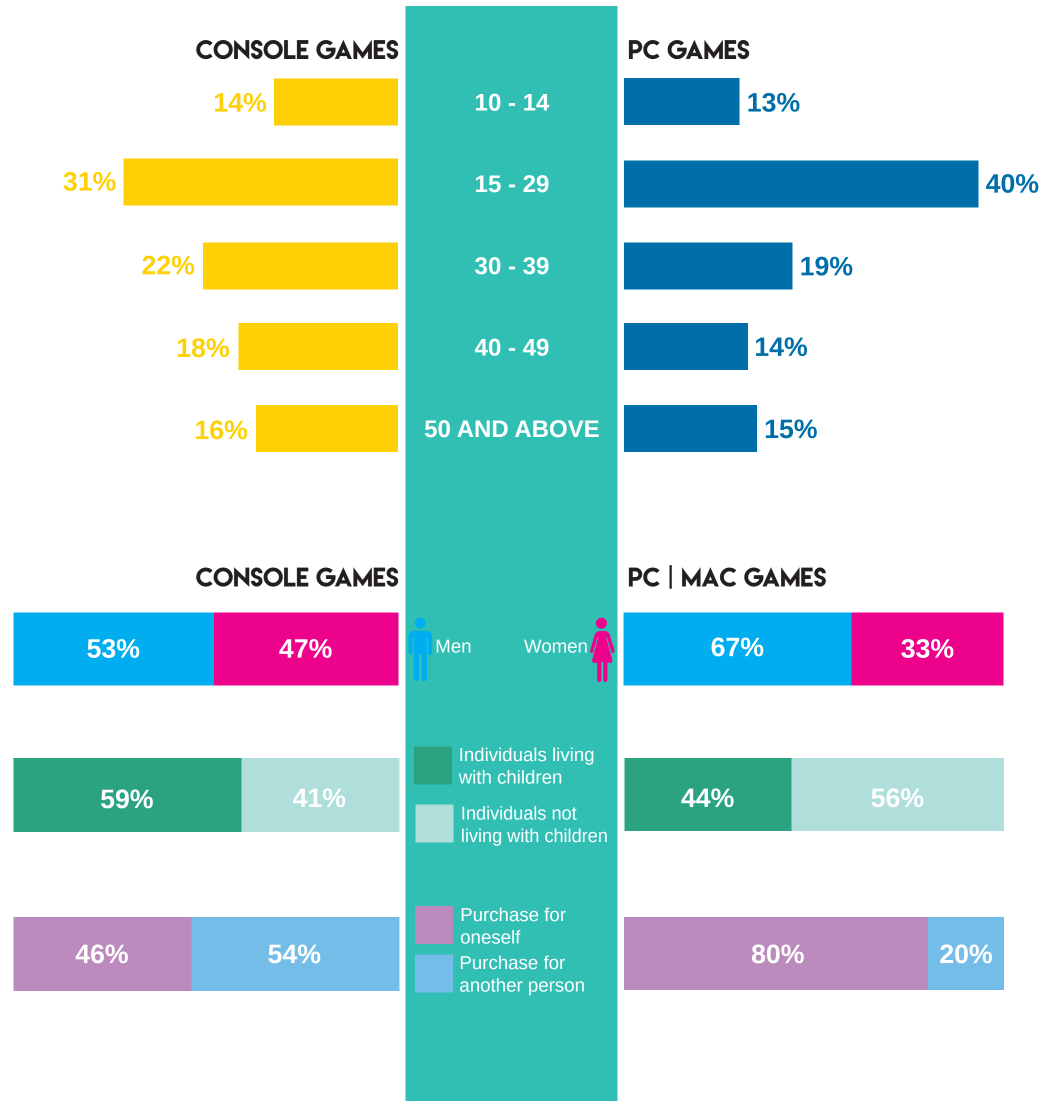
CONSOLES
33

PC GAMING
31

Source: GfK – REC
Source: Source: GFK – ENTERTAINMENT Consumer Panel

CONSOLE GAMES / PC GAMES: TWO COMPLEMENTARY WORLDS

As a percentage of buyers

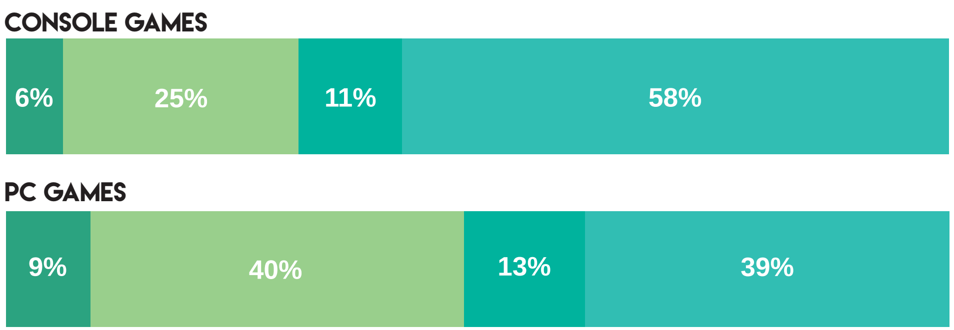


Source: Source: GFK – ENTERTAINMENT Consumer Panel

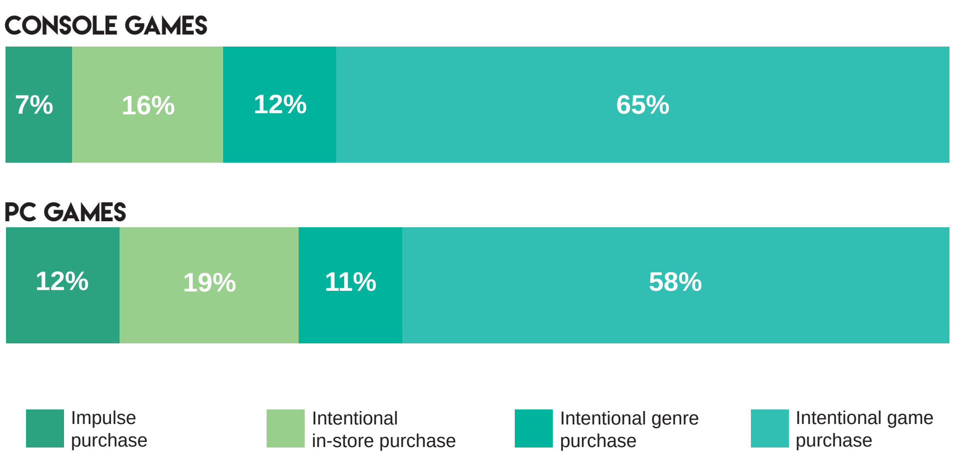
CONSOLE GAME / PC GAME: DISTINCT INTENTIONS TO BUY

As a percentage of buyers

PHYSICAL GAMES (INCLUDING SECOND-HAND)



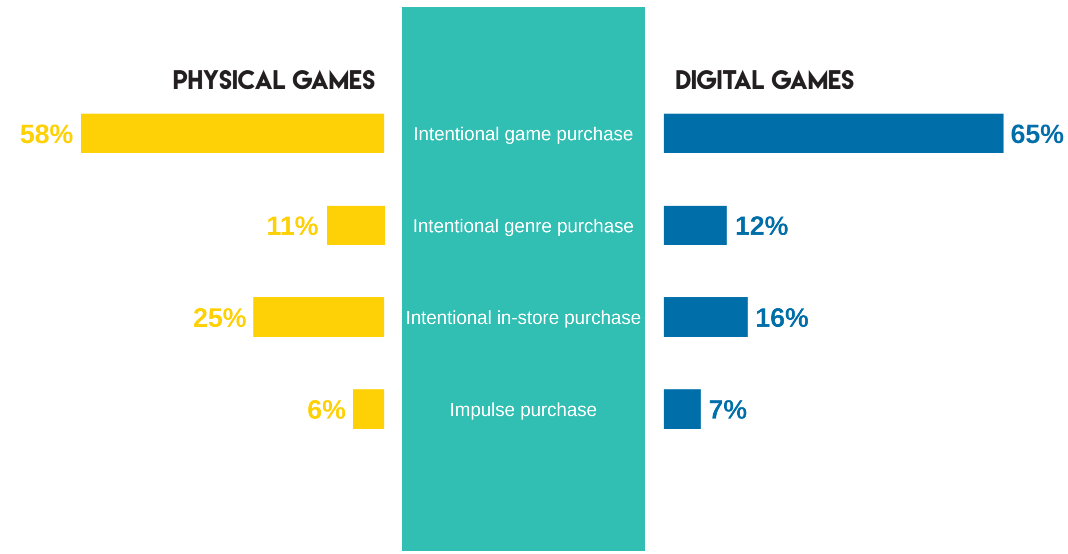
DIGITAL GAMES



Source: Source: GFK – ENTERTAINMENT Consumer Panel

CONSOLE GAMES: INTENTIONAL GAME PURCHASE

As a percentage of buyers

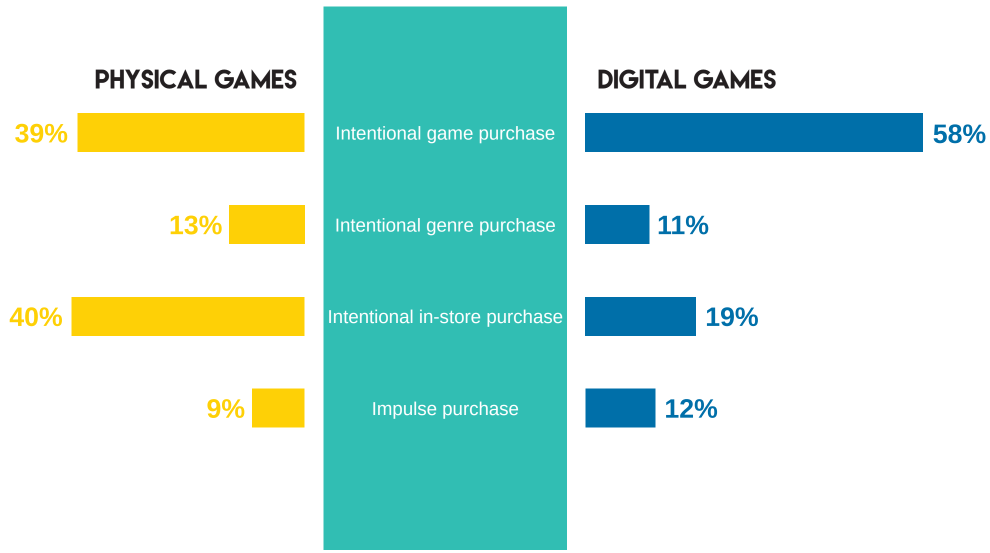


[2 OUT OF 3 DIGITAL PURCHASES ARE INTENTIONAL GAME PURCHASES]

Source: Consumer panel aged 10 and above, GfK France, full year 2016

PC GAMES: VARIATIONS ON INTENTION TO BUY

As a percentage of buyers



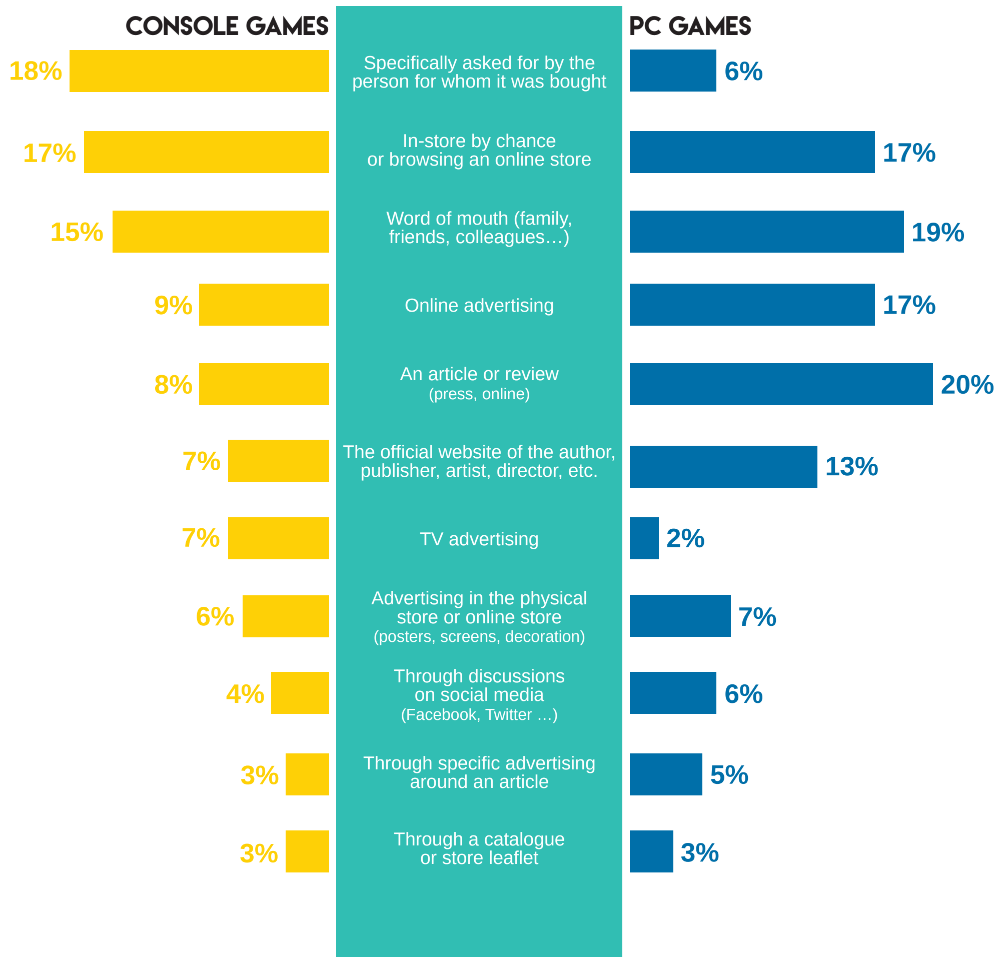
40% OF PHYSICAL PURCHASES ARE INTENTIONAL IN-STORE PURCHASES

58% OF DIGITAL PURCHASES ARE INTENTIONAL GAME PURCHASES

Source: Consumer panel aged 10 and above, GfK France, full year 2016

CONSOLE GAME / PC GAME: SOURCES OF KNOWLEDGE

As percentage of purchases (volumes)



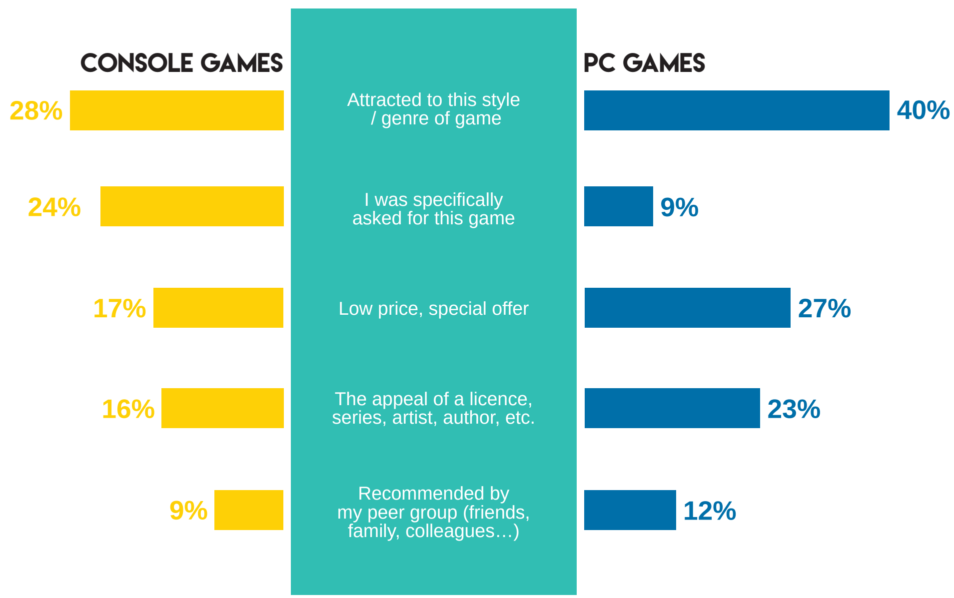
CONSOLE GAME / PC GAME: SOURCES OF KNOWLEDGE

	CONSOLE GAMES	PC GAMES
1	**Specific gift**	**Review of article**
2	In-store by chance/ browsing an online store	Word of mouth
3	Word of mouth	In-store by chance or browsing an online store

Source: Source: GFK – ENTERTAINMENT Consumer Panel

CONSOLE GAME / PC GAME: PURCHASE MOTIVATIONS

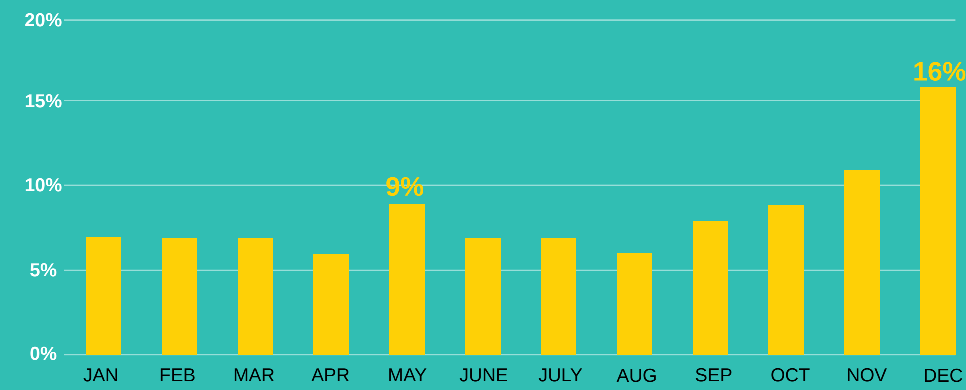
As percentage of purchases (volumes)



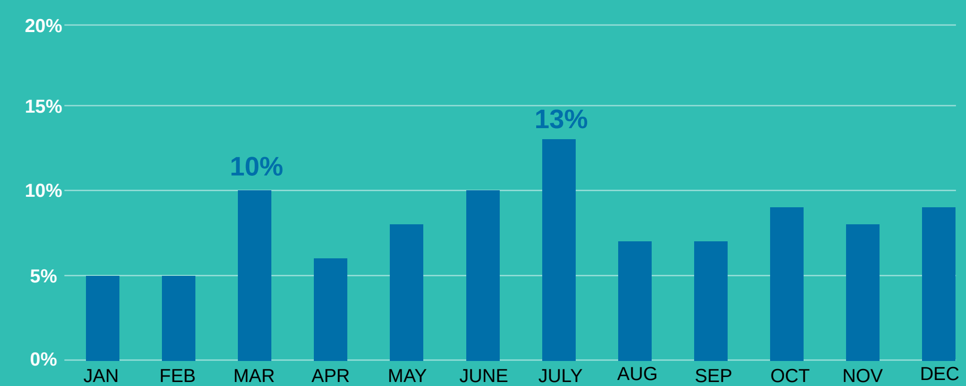
Source: Source: GFK – ENTERTAINMENT Consumer Panel

CONSOLE GAMES / PC GAMES: PURCHASE SEASONALITY

As percentage of purchases (volumes)



CONSOLE GAMES



PC GAMES

Source: Source: GFK – ENTERTAINMENT Consumer Panel

CHAPTER 4

VIDEO GAME BUYER PROFILES
PER DISTRIBUTION CHANNEL

NUMBER OF CUSTOMERS
PER DISTRIBUTION CHANNEL

In millions of video game buyers

LARGE SPECIALISED CULTURE STORE
2.3 M

ONLINE
2.6 M

VIDEO GAME SPECIALISTS
2.7 M

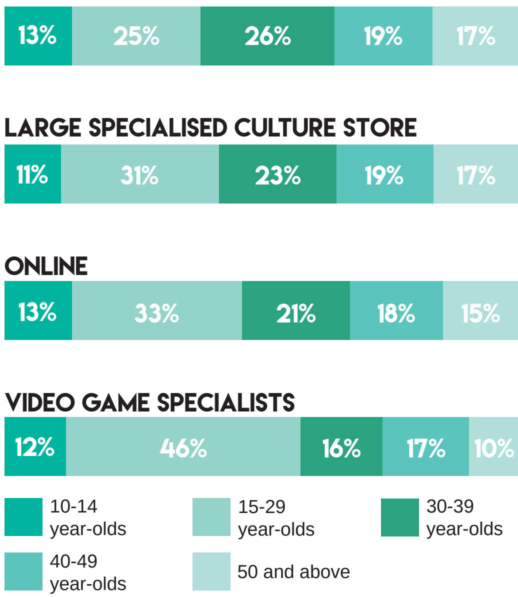
SUPERMARKET
3 M

PHYSICAL NEW VIDEO GAMES | 2016

Source: Source: GFK – ENTERTAINMENT Consumer Panel

VIDEO GAME BUYER AGE IN FRANCE IN 2016
PER DISTRIBUTION CHANNEL

As a percentage of buyers



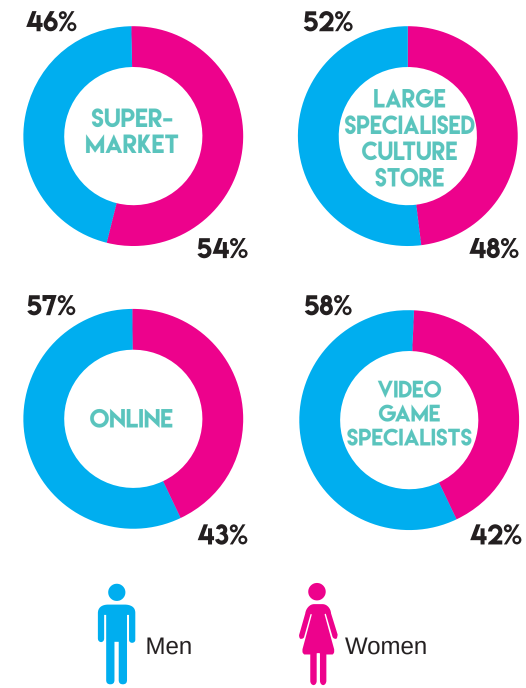
58% of video game buyers in specialist stores are under **29**

PHYSICAL NEW VIDEO GAMES | 2016

Source: Source: GFK – ENTERTAINMENT Consumer Panel

VIDEO GAME BUYER TYPE IN FRANCE IN 2016
PER DISTRIBUTION CHANNEL

As a percentage of buyers



A more **feminine target in supermarkets** and very masculine target online and in specialist gaming stores

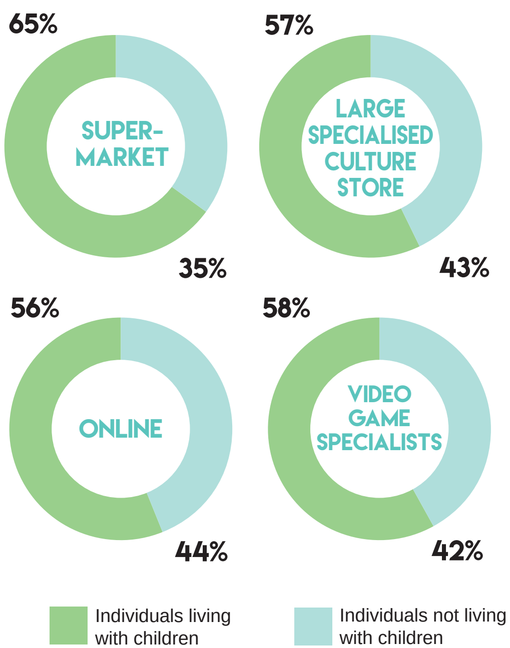
PHYSICAL NEW VIDEO GAMES | 2016

Source: Source: GFK – ENTERTAINMENT Consumer Panel

HOME SITUATION OF BUYERS OF CULTURAL GOODS IN FRANCE IN 2016

PER DISTRIBUTION CHANNEL

As a percentage of buyers



A more **family-based** target in supermarkets

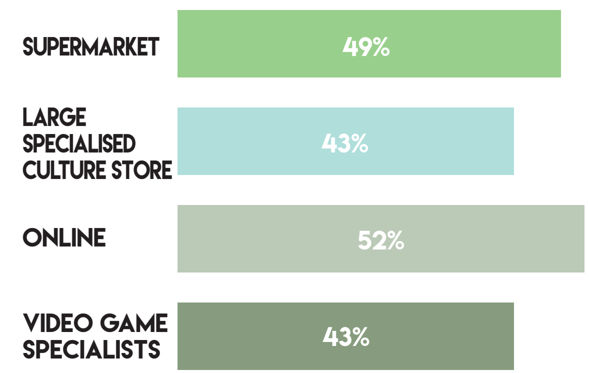
PHYSICAL NEW VIDEO GAMES | 2016

Source: Source: GFK – ENTERTAINMENT Consumer Panel

EXCLUSIVITY OF BUYERS OF CULTURAL GOODS IN FRANCE IN 2016

PER DISTRIBUTION CHANNEL

As a percentage of buyers exclusive to the channel



Online video game buyers are more faithful to that channel: **52% of them** only buy online

PHYSICAL NEW VIDEO GAMES | 2016

Source: Source: GFK – ENTERTAINMENT Consumer Panel

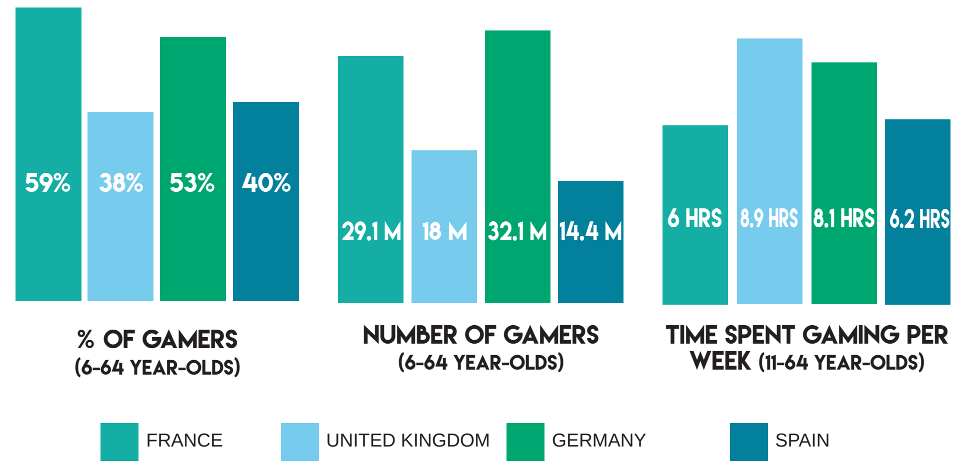
CHAPTER 5

A EUROPEAN VISION OF VIDEO GAMING PRACTICES

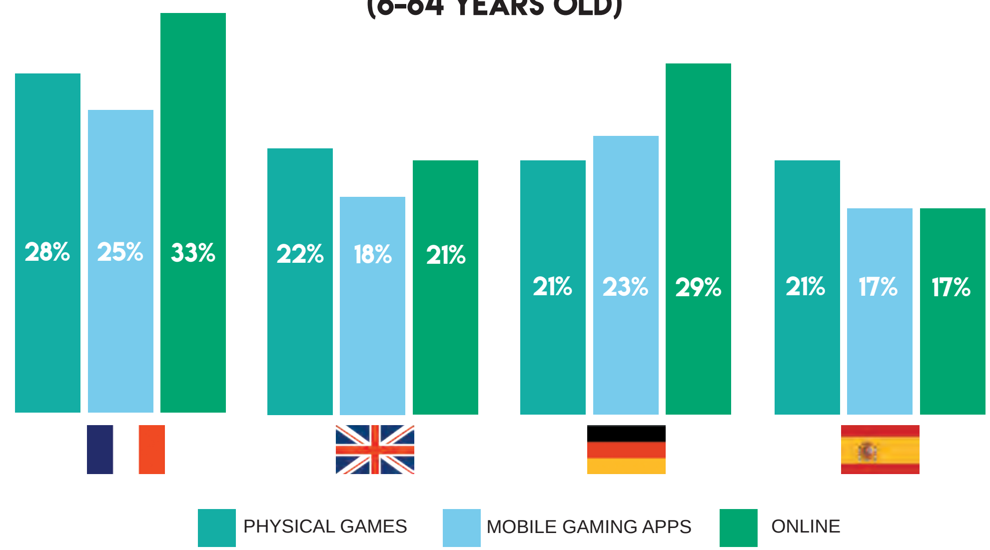
GAMETRACK

The European Gametrack survey by the IPSOS Institute is an online survey of 6,000 respondents representing the population and aged between 6 and 64 years old.
This survey and its results provide a view that is complementary to the work of SELL on the French market.

PROFILES OF EUROPEAN GAMERS



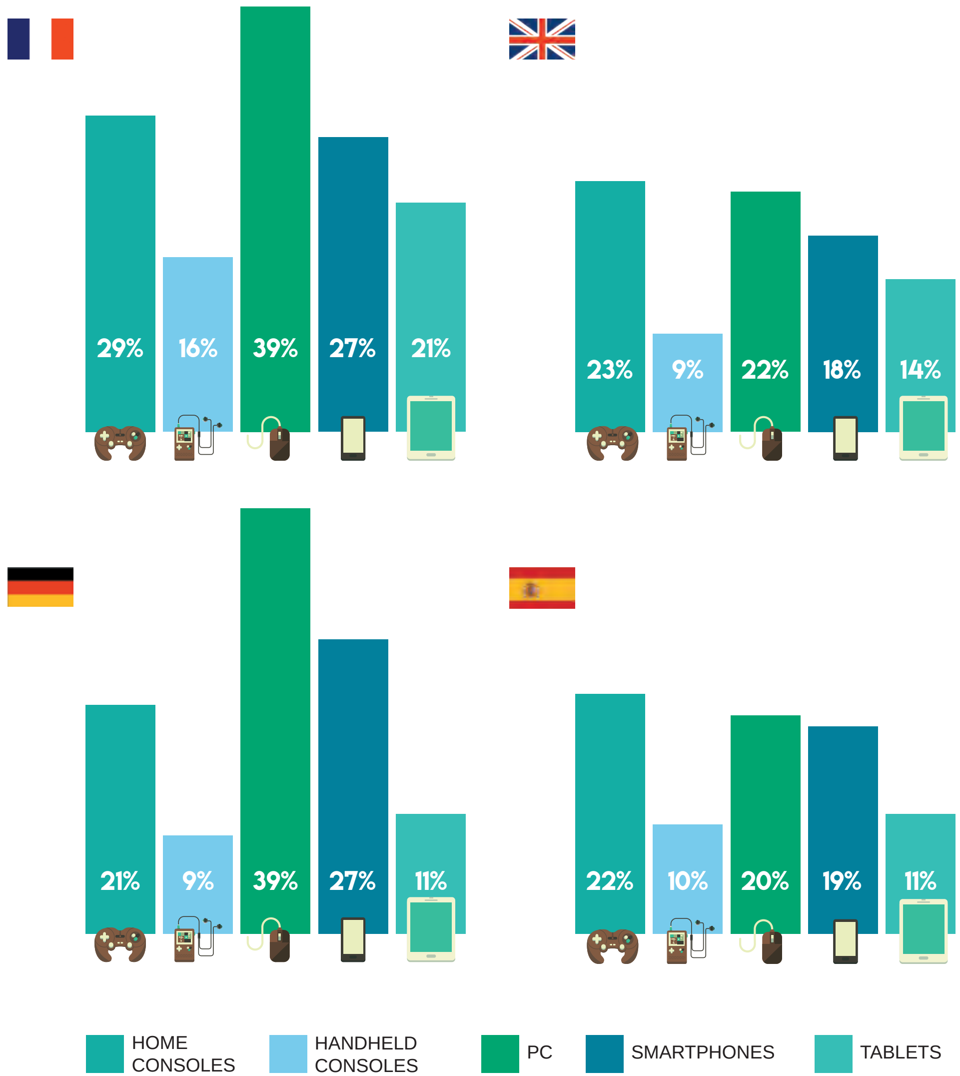
WHAT ARE THEY PLAYING? (6-64 YEARS OLD)



Physical games: all games that require a CD or a cartridge
Mobile gaming apps: games that are free or to-buy apps on smartphones or tablets
Online: multi-player modes, free or to-buy, downloaded games, games on social media and the Internet

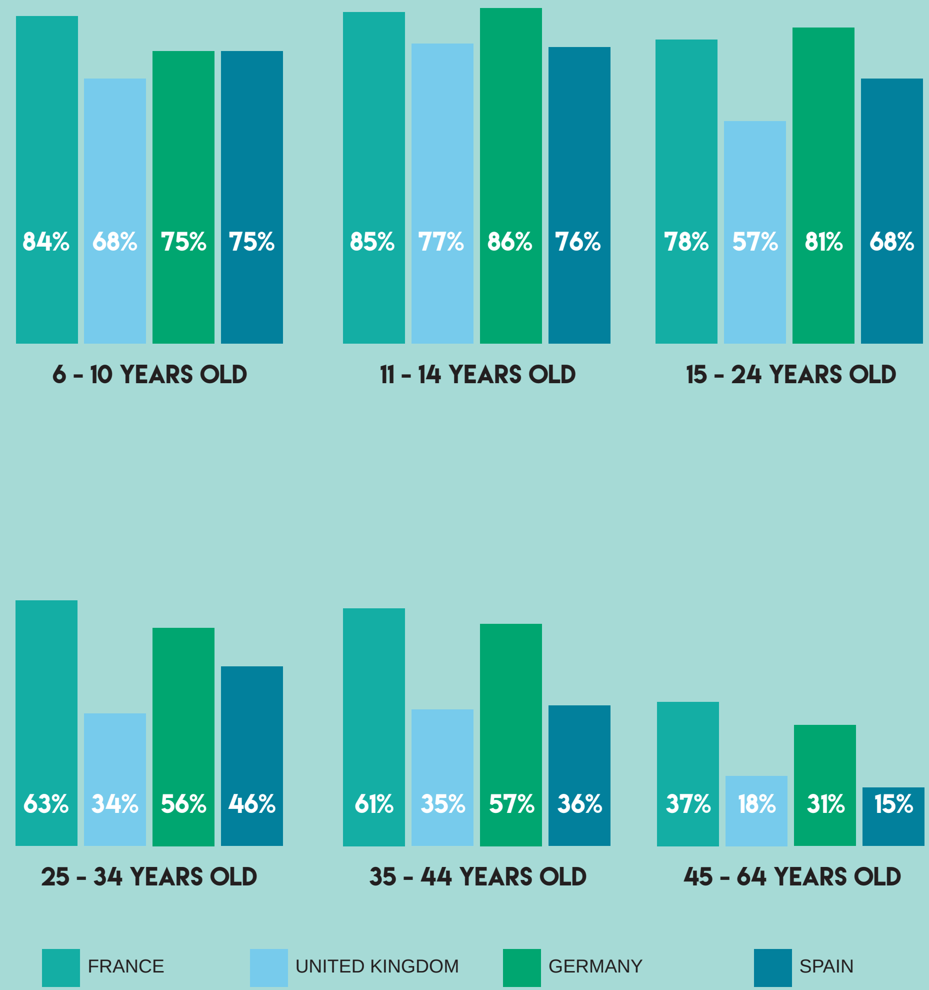
Sources: GameTrack / IPSOS / Q4 2016

BREAKDOWN OF EUROPEAN GAMERS BY PLATFORM (6-64 YEARS OLD)



Sources: GameTrack / IPSOS / Q4 2016

BREAKDOWN OF EUROPEAN GAMERS BY AGE GROUP (6-64 YEARS OLD)



Sources: GameTrack / IPSOS / Q4 2016

CHAPTER 6

A RESPONSIBLE INDUSTRY

PEGI

AN INFORMATION AND AWARENESS CAMPAIGN TO REMIND PARENTS OF THE RULES AND GOOD PRACTICES OF GAMING

Video gaming is a passion for increasing numbers of players, young and old alike. Like television and cinema, there are tools which allow gamers and parents to play "responsibly" thanks to the PEGI rating.
Just before the summer holidays and free days ideal for all kinds of fun and games, the Union of Video Game Publishers (SELL) is launching a campaign and giving parents advice on how to manage their children's gaming.
Published in a selection of French magazines and newspapers, the campaign provides three simple rules to make sure that gaming remains a pleasure for the whole family.

Since 2003, the PEGI system has been guaranteeing comprehensible and precise information regardless how much consumers know about video gaming. Since December 2015, the PEGI system has been accredited by the French Home Secretary.

PEGI uses very simple symbols: a quick glance is enough for parents to see the minimum age required for the game's content (3, 7, 12, 16 or 18). Clearly labelled on every video game, **these symbols do not refer to the difficulty of the game; they concern the recommended age**.
They appear with a short description about the game's content and the main reasons why the game has received that particular age rating.

What game are you playing?
As the spokesperson for the video game industry, SELL is highlighting its members' commitment to a certain number of values, the most important being responsibility.

A media campaign for parents
The campaign hopes to raise parents' awareness to the PEGI ratings and good gaming practices with some simple advice.

SELL has invested a budget of €400,000 from June to September to broadcast this message through advertorials in the French press: *ELLE, Famille et Education, La Revue des Parents, L'Obs, Marie Claire, Mon Quotidien, Petit Quotidien, Psychologies Magazine, Sport & Style Version Femina and Télérama.*

The campaign is focused around 3 rules and good practices:

- Check that the game is suitable for the child's age
- Set a limit on screen time
- There is nothing like gaming with your children to understand how and what they are playing.

THERE IS AN AGE FOR EVERYTHING AND THERE IS A VIDEO GAME FOR EVERY AGE.

PEGI E-LEARNING

TRAINING FOR RETAILERS

PEGI SA is offering a new training course for people who work in shops that sell video games. It's an e-learning tool, an online course about the PEGI system, the different ratings and the legal context for selling games in France.

This e-learning tool for retailers is on a European level and is being rolled out in different countries with translated modules containing country-specific information.

The objective is to provide interactive training accessible via PC, smartphone or tablet depending on the possibilities for the retailers.
The lesson includes information, visuals and animations about the PEGI system, ratings and their criteria, the links between the age logos and the content descriptors, content types, PEGI rules and also national laws. The module lasts approximately 30 minutes.

WHAT ARE THE ADVANTAGES FOR RETAILERS?

Employees are fully trained and understand the PEGI ratings and local laws about age classification and the protection of minors.

Consumer questions are answered better

Subscribing to this training demonstrates a company's sense of responsibility.

The **e-learning** course will earn the store a PEGI certificate as well as individual certificates for the employees.

The training is free, quick and easy to access.

For PEGI SA, the objective is to boost information about PEGI ratings, game content and national policies in the stores, and receive support for the system from the retailers.

THE E-LEARNING CONTENT IS AS FOLLOWS:

About PEGI
(age categories and content descriptors, rating process, statistics, detailed criteria and content)

PEGI in retail
(the logos, packaging, how to deal with consumer questions and manage complaints)

A test
(to earn the participant his or her PEGI training certificate.)

The principles of PEGI and national legislation (European situation, national laws, distribution charter in France)

PEGI ANALYSIS OF THE 2016 OFFER*

69%

PERCENTAGE OF GAMES RATED PEGI 12 AND BELOW

50%

PERCENTAGE OF GAMES RATED PEGI 7 AND BELOW

31%

PERCENTAGE OF GAMES RATED PEGI 16 AND 18

Source: GfK 2016 panel data
*Physical market

PEGI SALES ANALYSIS*

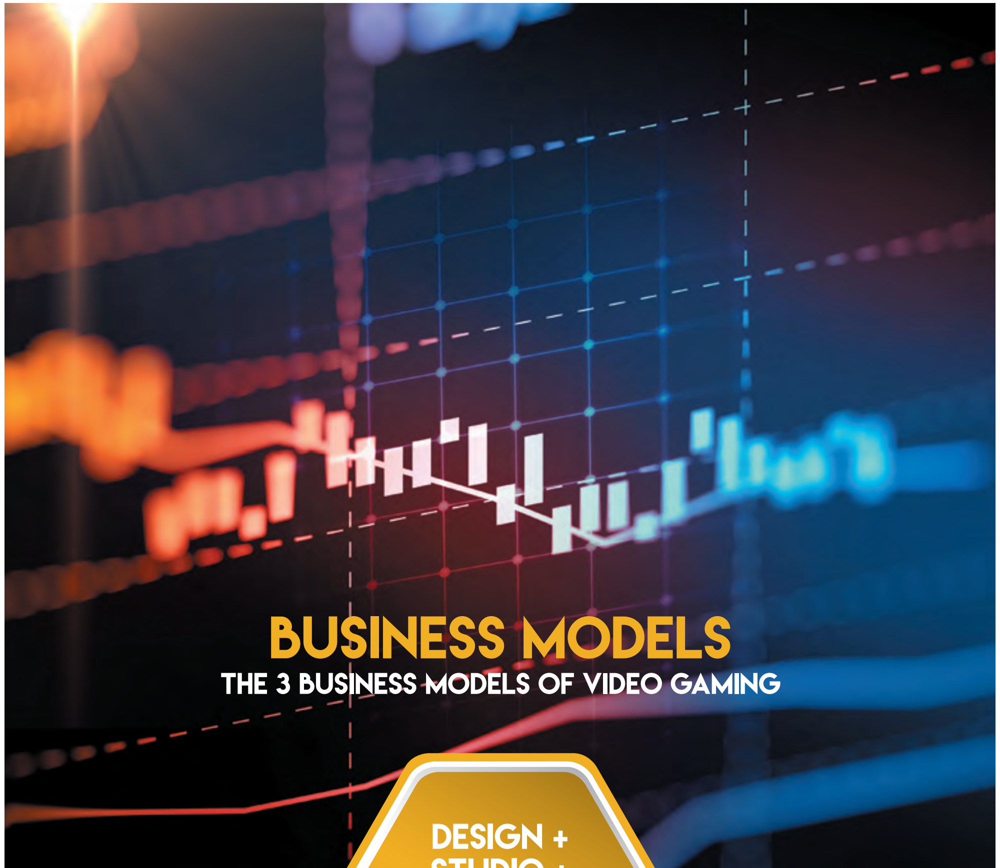
MARKET SHARE IN 2016

Source: GfK 2016 panel data
*Physical market

CHAPTER 7

THE VIDEO GAME INDUSTRY

THE VIDEO GAME ECOSYSTEM



BUSINESS MODELS

THE 3 BUSINESS MODELS OF VIDEO GAMING

CHAPTER 8

SELL

THE UNION OF VIDEO GAME PUBLISHERS

THE MISSIONS OF SELL

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**)

Under the presidency of **Jean-Claude Ghinozzi** (Director of the Retail Sales and Marketing Division for Microsoft France) and **Emmanuel Martin** (SELL General Delegate), 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 operators in the video game sector.

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 and new technologies which will move the video game industry forward, an industry which is enjoying constant growth.

Paris Games Week is a general public show. Over five days, 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.

Source: Source: GFK – ENTERTAINMENT Consumer Panel

Source: Source: GFK – ENTERTAINMENT Consumer Panel

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