The year 2013 had a profound effect on the video game industry. It may have been the year of the consoles with the arrival of the 8th generation, but 2014 is definitively the year for games dedicated to these new platforms! This revolution is already dramatically changing the gaming experience with new gameplay, totally immersive experiences, sharing and more.

We bear witnesses to the dynamic drive of publishers who have pulled off the challenge of integrating these new opportunities in increasingly surprising creations, always at the service of the gaming experience.

The entire sector celebrates this exceptional and vibrant energy. The renewal cycle for consoles is growing at a remarkable rate; the transition phase between the 7th and 8th generations has been a success. This should be supported by strong development of games and then accessories, which grow as the new generation of consoles becomes established. The forecast is very positive and consoles have a great future.

With this new issue of Essential Video Game News for Paris Games Week, we are going to provide the most faithful portrait possible of French gamers. We are presenting a brand new survey based on the new console generation, women & video games and parents & video games. We will be reissuing this survey every year.

Some of this data goes against our preconceptions. In light of the French population’s passion for the world’s 2nd largest cultural industry, for several years now we have been working hard to make France an internationally renowned video game nation. Our country is bursting with creative talent and expertise and everyone involved in the industry including government representatives is calling for the organisation of a unifying and international event in France at the height of our ambitions.

Paris Games Week, Game Connection and Game Paris are proud to officially announce, for the first time, their partnership in an exceptional week of video gaming in all its diversity: technological innovations, cultural products, careers, economic growth... We are working very hard to offer an event that unites the entire industry and every gaming public.

Enjoy the show and we’ll see you in February 2015 for the 4th edition of Essential Video Game News, with a report on 2014!

David Neichel,
Chairman of SELL
Contents

Chapter 1 - Understanding the video game market: essential data ................. 5
Chapter 2 - The French market and industry forecast ..................................... 10
Chapter 3 - Profiles of French gamers .......................................................... 13
  Video games: a cultural product ................................................................. 17
  New generation of home consoles ......................................................... 18
  Women & video games ........................................................................... 20
  Parents & video games ............................................................................ 22
  PedagoJeux.fr .......................................................................................... 25
  PEGI .......................................................................................................... 26
Chapter 4 - Paris Games Week: the gaming event in France ......................... 28
Chapter 5 - SELL ......................................................................................... 31

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

Chapter 1
Understanding the video game market: essential data
The video game console market operates in cycles. Each generation of consoles has enabled industry turnover to double.
Close up: market segments

The arrival of a new generation of consoles creates a cycle between the different video game markets (hardware, software, accessories).

The cycle has three stages:
1. Firstly, the growth of gaming hardware in households.
2. Next, consumers with home consoles buy games, which promotes the software market.
3. Finally, the accessory market grows as home console numbers increase.

Source: GfK

Consoles in France 7th and 8th generations at end 2013

15,113,000 home consoles
17,065,000 handheld consoles

50% Number of French households with consoles

Source: GfK / Panel data at end 2013

Business models

The 3 business models of video gaming

1. Design + Studio + Publishing + Distribution
2. Design + Studio + Publishing + Distribution
3. Design + Studio + Aggregators
Chapter 2

French market and industry forecast
Chapter 3
Profiles of French gamers

Forecast for 2014
A year of great potential

+7% Turnover

(at end 2014, with or without virtual
(hardware + software + accessories
+ online + mobile))

+42% Turnover

(hardware segment at end 2014
this indicates the strong
potential of software)

About the SELL “French public and Video gaming” survey

The “French public and Video gaming” survey was 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 1,002 people aged 10 to 65 were interviewed in October 2014.
Profiles of French gamers

Video gaming: a leisure activity for everyone

53% of French people play regularly
(10-65 year-olds)

75% of French people play at least occasionally
(10-65 year-olds)

35 years old
AVERAGE AGE of video gamer

37 years old
MEN

33 years old
WOMEN

51% MEN

49% WOMEN

PERCENTAGE OF GAMERS BY AGE GROUP

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>10-14 years old</td>
<td>98%</td>
</tr>
<tr>
<td>15-18 years old</td>
<td>86%</td>
</tr>
<tr>
<td>19-24 years old</td>
<td>90%</td>
</tr>
<tr>
<td>25-34 years old</td>
<td>84%</td>
</tr>
<tr>
<td>35-44 years old</td>
<td>75%</td>
</tr>
<tr>
<td>45-54 years old</td>
<td>69%</td>
</tr>
<tr>
<td>55+ years old</td>
<td>51%</td>
</tr>
</tbody>
</table>

HOW PEOPLE PLAY

GAMING FREQUENCY

- 21% EVERY DAY OR NEARLY EVERY DAY
- 28% REGULARLY (AT LEAST TWICE A WEEK)
- 29% OCCASIONALLY (2-3 TIMES A YEAR)
- 22% FROM TIME TO TIME (2-3 TIMES A MONTH)

BREAKDOWN OF GAMERS BY PLATFORM

<table>
<thead>
<tr>
<th>Platform</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>PC</td>
<td>67%</td>
</tr>
<tr>
<td>HOME CONSOLES</td>
<td>56%</td>
</tr>
<tr>
<td>SMARTPHONES</td>
<td>42%</td>
</tr>
<tr>
<td>HANDHELD CONSOLES</td>
<td>32%</td>
</tr>
<tr>
<td>TABLETS</td>
<td>29%</td>
</tr>
<tr>
<td>ONLINE BROADBAND OR CABLE</td>
<td>11%</td>
</tr>
</tbody>
</table>

PLAY MORE OFFLINE

- 60%

PLAY MORE ONLINE

- 23%

BOTH

- 17%

Sources: SELL / GfK “French public and Video gaming” survey of 1,002 people aged between 10 and 65 / October 2014
### Top 10 game types

<table>
<thead>
<tr>
<th>Game Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Platform Game</td>
<td>40%</td>
</tr>
<tr>
<td>Role-Playing/Adventure Game</td>
<td>26%</td>
</tr>
<tr>
<td>Strategy Game</td>
<td>26%</td>
</tr>
<tr>
<td>Action Game</td>
<td>25%</td>
</tr>
<tr>
<td>Social Game</td>
<td>24%</td>
</tr>
<tr>
<td>Driving Simulation</td>
<td>23%</td>
</tr>
<tr>
<td>Shooting/ FPS</td>
<td>21%</td>
</tr>
<tr>
<td>Football</td>
<td>19%</td>
</tr>
<tr>
<td>Children's and/or Family Games</td>
<td>19%</td>
</tr>
<tr>
<td>Multiplayer Online Game (MMORPG)</td>
<td>18%</td>
</tr>
</tbody>
</table>

### Profiles of French gamers

70% of French people consider video gaming a new culture.

61% of French people consider video gaming a positive activity.

78% of French people consider video gaming a leisure activity for the whole family.

Gaming: the 2nd largest leisure industry in France behind books.
Profile of French gamers - The new generation of home consoles

The new generation of home consoles

74% OF FRENCH PEOPLE HAVE HEARD ABOUT 8TH GENERATION CONSOLES

BREAKDOWN OF BUYER MOTIVATIONS

- Graphics: 74%
- Multiplayer (online and offline): 43%
- Connectivity: Sharing and split-screens: 33%
- Multimedia platform: 32%

Sources: SELL / GfK “French public and Video gaming” survey of 1,002 people aged between 10 and 65 / October 2014

Profile of French gamers - The new generation of home consoles

The new generation of home consoles

4.4 Average number of games already purchased

69% Physical games

12% Virtual games

19% either one or the other

74% of gamers have connected their new generation home console to the internet

1/5 1 French person in 5 plans to buy a new generation home console in the next few months

Sources: SELL / GfK “French public and Video gaming” survey of 1,002 people aged between 10 and 65 / October 2014
Women & video games

Gaming Frequency
- 11% Every day or nearly every day (men 20%)
- 26% Never (men 23%)
- 19% From time to time (2-3 times a month) (men 15%)
- 26% Occasionally (2-3 times a year) (men 16%)
- 18% Regularly (at least twice a week) (men 24%)

ON WHAT PLATFORMS DO THEY PLAY?
- 65% PC (men 69%)
- 58% Home consoles (men 54%)
- 47% Smartphones (men 37%)
- 36% Handheld consoles (men 27%)
- 30% Tablets (men 27%)
- 7% Online broadband or cable (men 6%)

Top 10 game types

BREAKDOWN OF WOMEN GAMERS BY GAME TYPE
- Platform games: 49% (men 52%)
- Social games: 37% (men 11%)
- Children’s and/or family games: 28% (men 11%)
- Role-playing/Adventures: 25% (men 26%)
- Action games: 20% (men 29%)
- Strategy games: 19% (men 33%)
- Multiplayer online game (MMORPG): 14% (men 21%)
- Driving simulation: 13% (men 12%)
- Fighting: 8% (men 15%)
- Shooting/FPS: 7% (men 18%)

Sources: SELL / GfK “French public and Video gaming” survey of 1,002 people aged between 10 and 65 / October 2014
Parents game with their children

62% of parents game with their children

34% of gamers are parents

Why do parents game with their children?

69% it’s an opportunity to do something together

40% because the parent likes gaming

24% because it means they can check the content

56% because the child asks them to

Sources: SELL / GfK “French public and Video gaming” survey of 1,002 people aged between 10 and 65 / October 2014
Profiles of French gamers - Parents & video games

Are parents interested and careful?

- 93% are careful about how and what games their children play.
- 85% give their permission prior to the purchase of a video game.
- 40% use parental control.
- 81% of parents control their child’s playing time.

Sources: SELL / GfK “French public and Video gaming” survey of 1,002 people aged between 10 and 65 / October 2014

Profile of French gamers - Parents & video games

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 our pedagojeux.fr website, we pass on key information and promote best practices to help parents support their children in their use of video games. Questions about gaming time, sleep, age and game content are major concerns for parents today. PédaGoJeux strongly believes that parents should be aware of and understand PEGI ratings. They can then choose games adapted to the age and sensibilities of their children. We also focus on the importance of dialogue with the child about his or her gaming experience.

PédaGoJeux is a collective created in 2008 by people from public bodies, the gaming industry and associations. The multi-representational organisation of PédaGoJeux ensures a balanced approach to video gaming. With no demonisation and no rose-tinted views, our objective is to present the benefits and advantages of video gaming and the points for concern.

To raise public awareness, PédaGoJeux has created a partnership programme called “PédaGoJeux Ambassador”. Launched in October 2014, it uses educational mediators, most often governmental or associative bodies, who carry out video game awareness and information actions with families. These Ambassadors provide information from PédaGoJeux.

This programme received the “Défenseur des droits” label dedicated to the 25th anniversary of the Convention on the Rights of the Child.

Finally, the pedagojeux.fr website is having a make-over, to make the content even richer and more easily accessible.

The current active members of the PédaGoJeux collective are: the National Union of Family Associations (UNAF), Fear-Free Internet, the Ministry for Family Affairs, the Union of Video Game Publishers (SELL), Bayard Jeunesse and JeuxOnline.
PEGI: Pan European Game Information
A responsible industry

Founded in 2003, the PEGI system is used in 31 countries, federates 600 companies and has endorsed over 20,000 games since its creation.

3 questions for Simon Little, Managing Director PEGI SA.

What does a game endorsement entail?
The PEGI game rating system is the result of a highly organised process: each company appoints a supervisor who is specifically PEGI-trained. When a game is submitted, this supervisor completes a questionnaire that details every aspect of the game. It is then awarded a temporary endorsement.

The game content is then verified by a dedicated inspection organisation and, after validation, the game is awarded its definitive rating.

Which organisation performs the inspections?
There are two: NICAM, based in the Netherlands for the 3, 7 and 12 games and the Video Standards Council based in the United Kingdom, for the 16 and 18 games. They are both totally independent organisations that solidly apply the PEGI rating system.

Is PEGI continuing to evolve?
PEGI has a network of international experts that are recognised academics and specialists in fields such as media, psychology, regulatory systems, law and technologies. These experts advise PEGI on changes in technologies and content.

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 a unique system that is 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.

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 packaging, 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.

This game contains bad language.
This game contains images which may encourage discrimination.
This game refers to the use of drugs (including tobacco and alcohol).
This game shows nudity and/or sexual behaviour or makes sexual references.

This game contains violent scenes.
This game may frighten young children.
This game can also be played online.
This game encourages and/or teaches gambling.
Chapter 4

Paris Games Week: the gaming event in France

Over its four editions, Paris Games Week has become one of the world’s Top 5 video game trade fairs. Our ambitions for the coming years are clearly illustrated and very strong: we want to make Paris Games Week a key and essential event in the sector’s international diary. Year after year, more and more people attend - members of the public and industry professionals - making Paris a world capital in video gaming and Paris Games Week a tool to be used by the entire French industry.

The 5th edition of Paris Games Week will be the opportunity for our visitors to discover the trends, new products and future of video gaming! Games manufacturers, publishers and accessory manufacturers promise gamers an exceptional show.

This year, we are continuing to highlight French expertise in design with the Made in France Games space, in partnership with Capital Games. It is a showcase for twenty independent studios who are presenting their creations to the public. And as young people are our primary audience, we are welcoming schools and colleges once again to the Paris Games Talents, Schools & Training section where every games fan can find out about a career in the gaming industry. Paris Games Week is also a family event with an entire hall dedicated to fun and leisure. This year, Paris Games Week Junior will take over 1,900m² and offer 3-12 year-olds every new product dedicated to their age group as well as many other fun activities.

We look forward to seeing all our fans and the entire gaming industry at Paris Games Week 2014!

Emmanuel Martin, General Delegate of SELL
Paris Games Week: the gaming event in France

Paris Games Week in figures
Top 5 international video game events
Top 5 French trade fairs

<table>
<thead>
<tr>
<th>Year</th>
<th>Growth in Number of Visitors</th>
<th>Growth in Size</th>
<th>Growth in Number of Exhibitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>120,000</td>
<td>14,000</td>
<td>28</td>
</tr>
<tr>
<td>2011</td>
<td>180,000</td>
<td>26,000</td>
<td>36</td>
</tr>
<tr>
<td>2012</td>
<td>212,000</td>
<td>22,000</td>
<td>51</td>
</tr>
<tr>
<td>2013</td>
<td>245,000</td>
<td>32,000</td>
<td>79</td>
</tr>
<tr>
<td>2014</td>
<td>50,000</td>
<td>104</td>
<td>104</td>
</tr>
</tbody>
</table>
SELL stands for the Syndicat des Editeurs de Logiciels de Loisirs, or the Union of Video Game Publishers.

**The missions of SELL**

SELL is France’s national organisation representing video game publishers and software manufacturers. Today, it has around thirty members representing over 95% of the sector’s turnover, according to the GfK panel.

SELL promotes and defends the collective interests of interactive programme publishers in different domains where their products are used (on- and offline) and within the different professional economic or legal boundaries concerning them, contributing to the market’s structure (ratings, promotion of the profession, anti-piracy, press, etc.) and its recognition by all professionals, public authorities and consumers.

SELL expresses our industry’s desire for responsibility: the PEGI rating system, an informative tool for parents with PedagoJeux.fr

**SELL ALSO ORGANISES EVENTS FOR OUR INDUSTRY:**

- The European trade fair: IDEF – www.idefexpo.com
- The general public exhibition: PARIS GAMES WEEK www.parisgamesweek.com (245,000 visitors in 2013)

SELL promotes the collective interests of interactive programme publishers in different domains where their products are used (on- and offline) and within the different professional economic or legal boundaries concerning them, contributing to the market’s structure (ratings, promotion of the profession, anti-piracy, press, etc.) and its recognition by all professionals, public authorities and consumers.

**Professionals**
- Research - Information
- Public relations
- IDEF

**Public authorities**
- Government
- Institutions
- European Union

**Gamers**
- Paris Games Week
- Information - News - Prevention

**Public**
- PEGI - PEDAGOJEUX
- Fighting piracy
The members of SELL

- 505 Games
- Activision Blizzard
- Bandai Namco Games
- Bethesda
- Bigben Interactive
- Capcom
- Disney Interactive
- Electronic Arts
- Focus Home Interactive
- Game One
- Innelec Multimedia
- Just For Games
- King
- Koch Media
- Konami
- Microsoft
- Nintendo
- Orange
- Sega
- Sony
- Square Enix
- Take-Two Interactive
- Ubisoft
- Warner Bros Interactive

About the GfK Group

GfK provides reference information about markets and consumer behaviour. Over 13,000 market survey experts combine their passion with 80 years of experience in data analysis. With its global vision, GfK provides local insight to over 100 countries. Using innovative technologies and the latest in market analysis, GfK transforms Big Data into Smart Data, enabling its customers to improve their competitive edge and enrich consumer experiences and choices. To find out more, visit gfk.com and follow us on twitter.com/GfK_en.

About the SELL "French public and Video gaming" survey

The "French public and Video gaming" survey was 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 1,002 people aged 10 to 65 were interviewed in October 2014.
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