OCTOBER 2024

ESSENTIAL VIDEO GAME NEWS



FRENCH PEOPLE AND VIDEO GAMES





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EDITORIAL



JAMES REBOURS CHAIRMAN OF SELL

ssential Video Game News provides an annual snapshot of the video game industry in France. From one year to the next, it is an essential tool for highlighting new video game practices, and confirming underlying trends that are becoming established over time.

From this point of view, 2024 was a year full of positive lessons.

Firstly, two key indicators of the relationship between French people and video games - the overview of the sector and the reasons given for playing - show an increasingly strong attachment to video games. An attachment to the sector as an economic activity, seen as increasingly creative, innovative and positive. And an attachment to the simple pleasure offered by this major digital leisure activity; we play more than ever to have fun, get away from it all, have a good time and join a community.

In 2024, the number of regular players in France stabilised at a very high level (52%). Of the more than 38 million players in France, 75% play video games at least once a week, indicating an exceptional level of commitment. In this edition, we wanted to shine a spotlight on these most committed players in particular. Who are these regular players? Our study helps to debunk certain misconceptions. It reveals, for example, that these committed players are not more sedentary than the average French person. On the contrary, they are more open to cultural activities and sports. They are also more responsible players, making greater use of parental controls than the average player.

One of the other key findings of this study is that the way we play is changing and becoming ever more fluid. The complementary nature of the different types of playing devices continues to grow. Far from

opposing or segmenting the video game market, the multiplicity of these devices is an asset for video games and great for players too! On average, French people play on more than two different devices. And these devices are not divisive; they facilitate access to the game. This study is a reminder of the extent to which console players and mobile players are in fact often the same.

Finally, this 2024 issue shows that video games are increasingly popular with French people as a great social tool. Once again, this study should help debunk the clichés that can still be heard about video games. In 2024, players very often played to join a community (31% of all players) or simply to make friends (48% of child players). And the younger you are, the more this is true; the feeling of belonging to a community is very strong among 10-14 year-olds (53%) and 15-24 year-olds (45%).

As we can see, beyond the very short-term changes in the supply of games and the difficulties on the production side, the video game sector has powerful structural foundations: the motivations for playing, the intensity of commitment and the changing practices demonstrate real stability and are all solid assets for the sector as a whole.

JAMES REBOURS, CHAIRMAN OF SELL

CHAPTER

VIDEO GAMES IN FRANCE



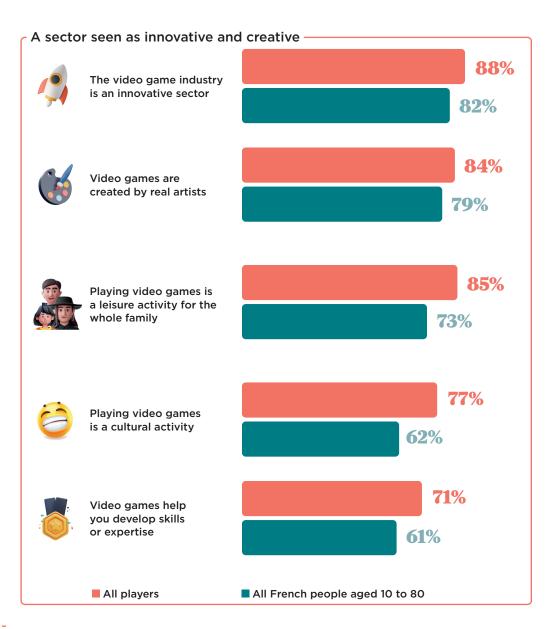
The French people and video games survey: survey carried out online from 27th June to 24th July 2024 with a sample of 4,005 people aged 10 to 80, representative of the French population aged 10 to 80.

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Profiles of French players	80
• Focus on Gen Z	18
• Focus on women/girls	20
• Focus on seniors	22
Social aspect of video games	24
Cultural, sporting and multimedia habits of regular players	27
Buying behaviour	29
An attractive work sector	32

A POPULAR SECTOR ENJOYED BY FRENCH PEOPLE...



... A POPULAR AND SOCIAL **DIGITAL LEISURE ACTIVITY**

Motivations for playing ————————————————————————————————————	
Have fun	93%
Get away from things, get a break from the daily routine	83%
Share a pleasant moment with other people	68%
Train in a particular activity to progress, learn and improve	59%
Take part in a competitive activity with a challenge or an objective	52%
Participate in an activity that uses the latest technological and digital advances	44%
Belong to a group/community	32%

38.3 MILLION PLAYERS

AGED 10 AND OVER



*Players who say they play video games at least once a year.

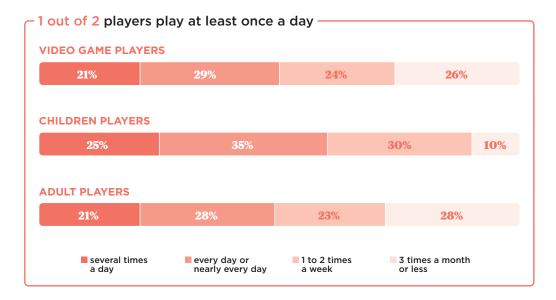
84% **ADULTS (18 AND OVER) 32.1 MILLION PEOPLE**

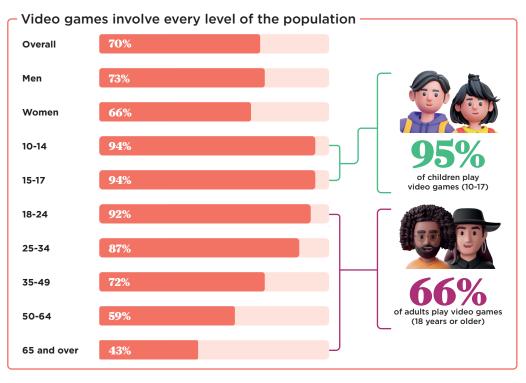


ALL **FRENCH PLAYERS**

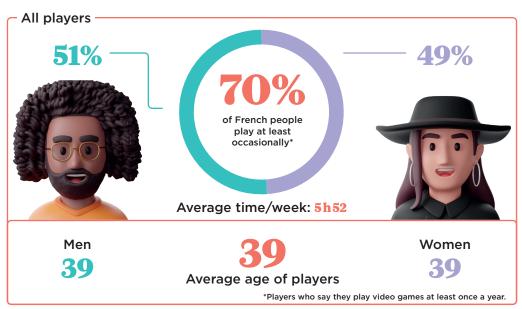


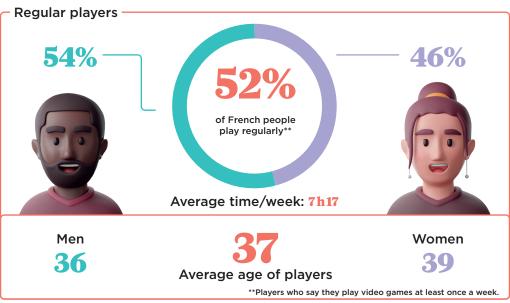
16% CHILDREN (AGED 10-17) **6.2 MILLION PEOPLE**



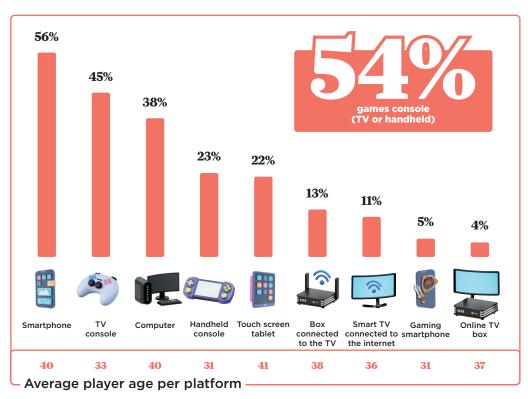


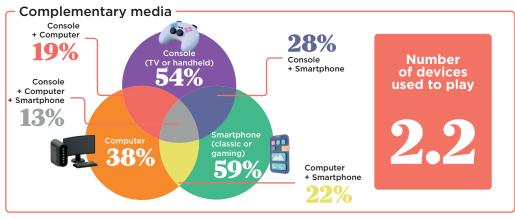
PROFILES OF FRENCH PLAYERS



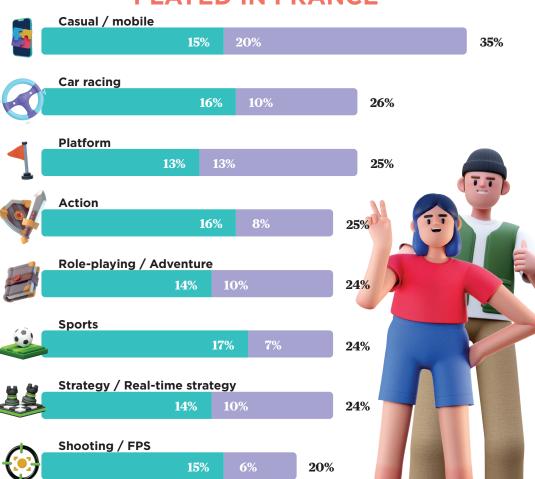


DEVICES USED TO PLAY VIDEO GAMES





TOP 10 GAME GENRES PLAYED IN FRANCE





Multiplayer online

13%

8%

20%



Children's and/or family games

'% 11%

18%



All women

TOP 3 VIDEO GAME GENRES BY DEVICE



TV (CONSOLE	
36%	Car racing	
33%	Action	
33%	Sports	



TABL	.ET
38%	Casual
15%	Strategy / Real-time strategy
14%	Social

1 H	ANDHELD CONSOLE
36%	Platform
26%	Children's games / Family games
26%	Role-playing / Adventure

	ONLINE TV BOX
20%	Shooting / FPS
18%	Sports
17%	Role-playing / Adventure



19% Action

17% Shooting / FPS

16% **Sports**

SMART TV CONNECTED THE INTERNET

21% Action

Role-playing / Adventure 19%

18% **Sports**

GAMING SMARTPHONE

Casual 22%

Platform 20%

Strategy / Real-time strategy 19%



FOCUS ON GEN Z (15-24 YEARS OLD)





AVERAGE AGE



Average time/week: 6 h 56

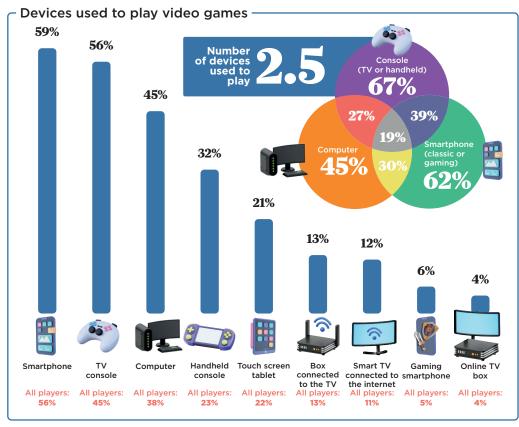
Total percentage of men/women aged 15-24 -

Men

54% 46%

Women

- Frequency of video game play -Several times a day | All players: 21% 24% Almost every day | All players: 29% 31% 1 to 2 times a week | All players: 24% 27% 3 times a month or less | All players: 26% 18%





FOCUS ON WOMEN

18.7 MILLION PLAYERS

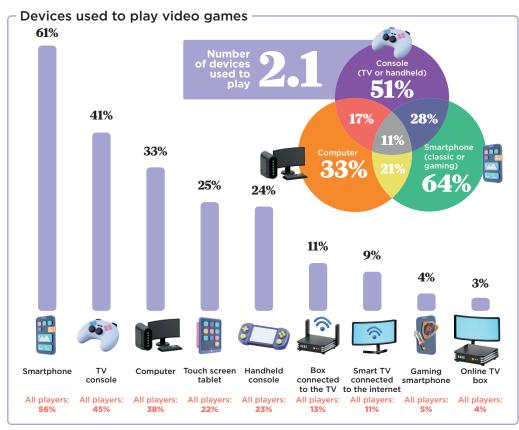


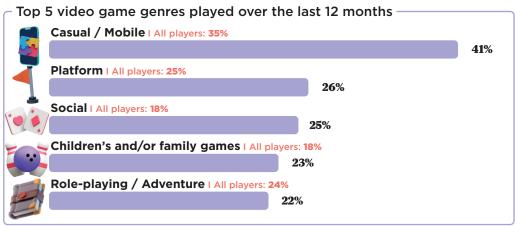


49% of video game players are women

Average time/week: 5 h 12

 Frequency of video game play 				
Several times a day All players: 21%	21%			
Almost every day All players: 29%				
Airriest every day FAII players. 25%		27%		
1 to 2 times a week All players: 24%				
	23%			
3 times a month or less All players: 26%				
			30%	





FOCUS ON SENIORS (65 AND OVER)

4.7 MILLION PLAYERS

43% of seniors play video games



69 AVERAGE AGE 12%
of video game
players are
seniors

Average time/week: 4 h 49

Total percentage of men/women aged 65 and over

Men

52%

48%

Women

- Frequency of video game play -

Several times a day | All players: 21%

21%

Almost every day I All players: 29%

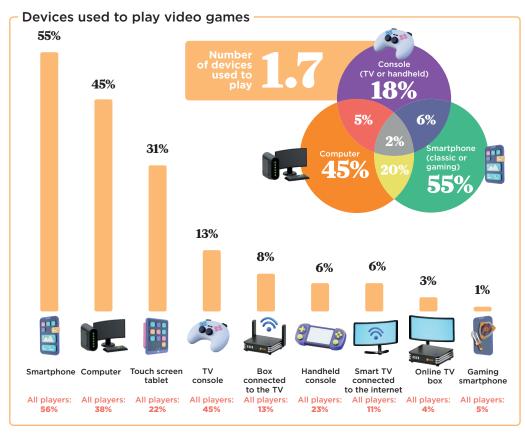
29%

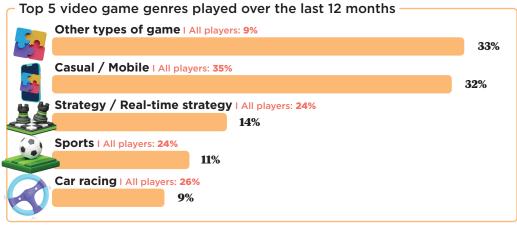
1 to 2 times a week | All players: 24%

16%

3 times a month or less | All players: 26%

34%





SOCIAL ASPECT OF VIDEO GAMES





31%

OF VIDEO GAME PLAYERS HAVE THE FEELING OF BELONGING TO A COMMUNITY

...ESPECIALLY YOUNG PEOPLE

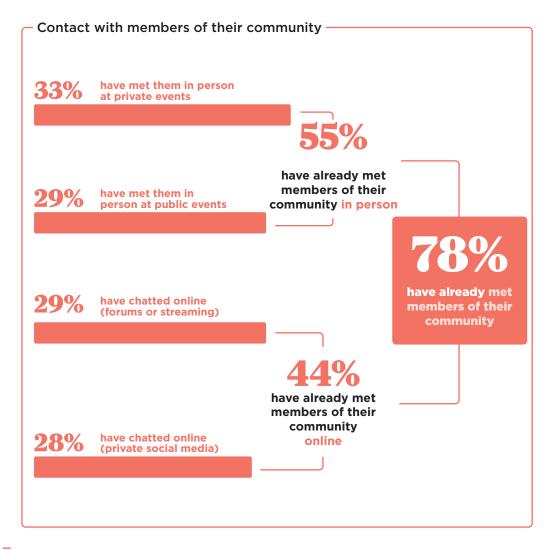


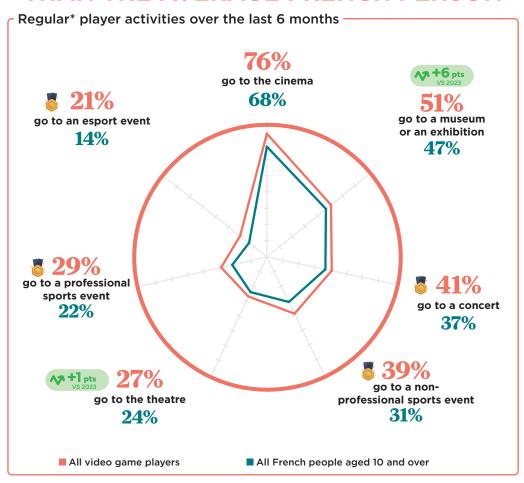


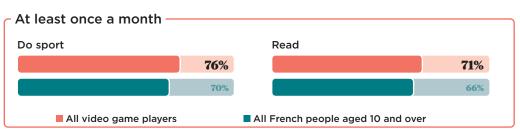
The player community ————————————————————————————————————	
Caring and welcoming	91%
Brings members together on subjects other than video games	83%
Helps players make friends that they would not otherwise have met	82%

VIDEO GAMES AS A VECTOR OF SOCIAL INTERACTION

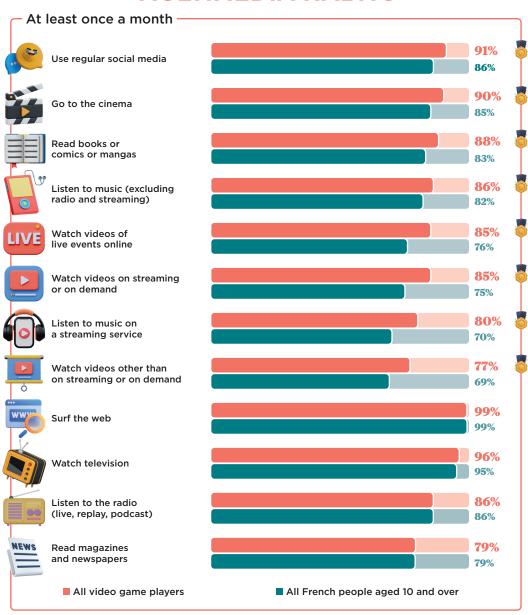
OF PLAYERS CONSIDER. VIDEO GAMES HELP PEOPLE CONNECT SOCIALLY OF PLAYERS CONSIDER THAT



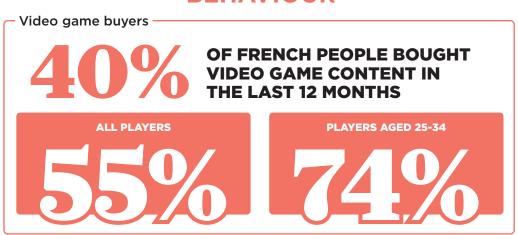


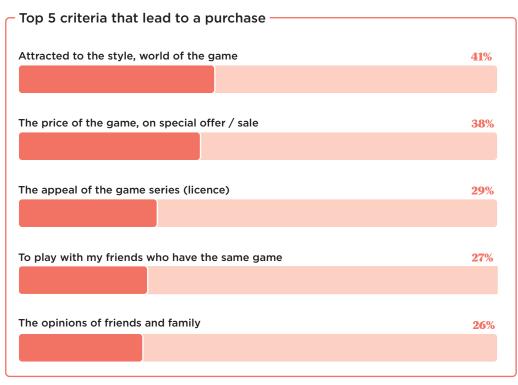


REGULAR PLAYER MULTIMEDIA HABITS

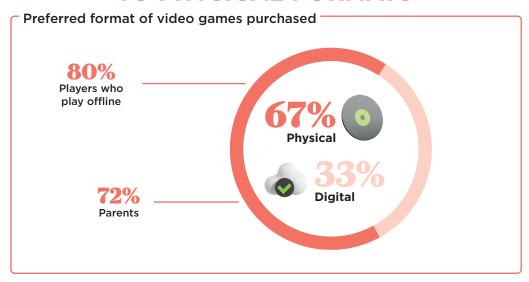


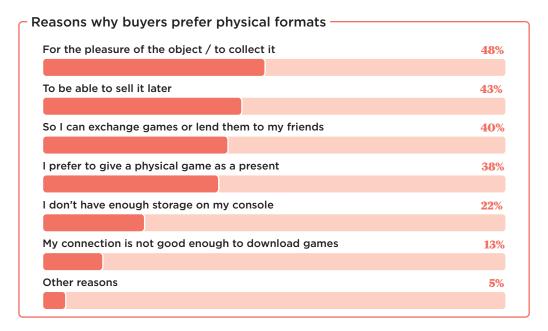
PURCHASING BEHAVIOUR





PLAYERS ARE VERY ATTACHED TO PHYSICAL FORMATS





Preferred place to buy video games in a store On the internet of regular players of regular (play video players games at least aged 10-14 once a day) 61% of players of online video who only game players play offline

Reasons why buyers prefer buying in stores	
For store-specific special offers	41%
Because it's easier to choose a game in a store	39%
Because I find it quicker to buy in a store	34%
To be able to chat to the sales staff	33%
To see the store's second-hand games	26%

AN ATTRACTIVE PROFESSIONAL SECTOR...

38%

OF PEOPLE AGED 18-24 HAVE ALREADY CONSIDERED WORKING IN THE VIDEO GAME INDUSTRY



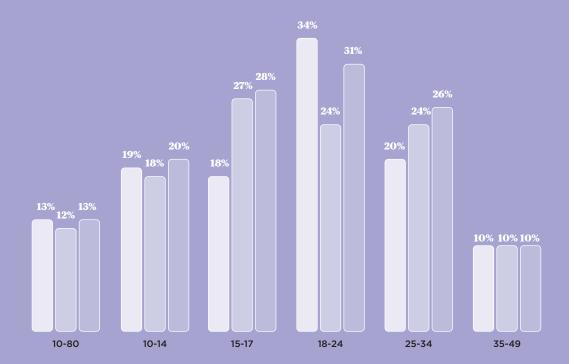
All men

All French people aged 10 and over

All women



...PARTICULARLY **WOMEN AGED 15-34**



2022

2023

2024

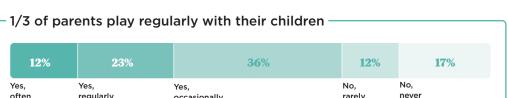


CHAPTER

A RESPONSIBLE INDUSTRY

35
38
39
40
41
44
45
46
47

rarely

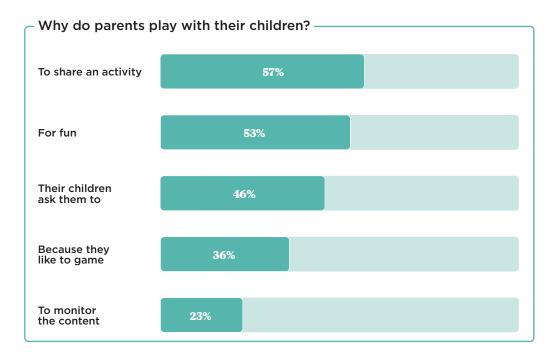


occasionally

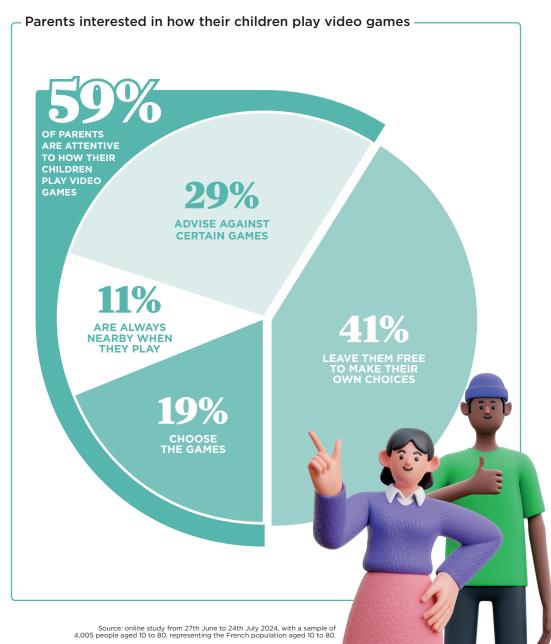
regularly

often

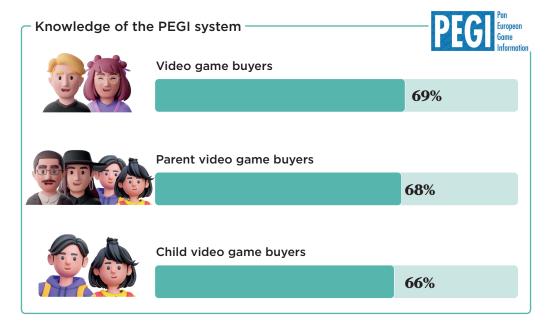




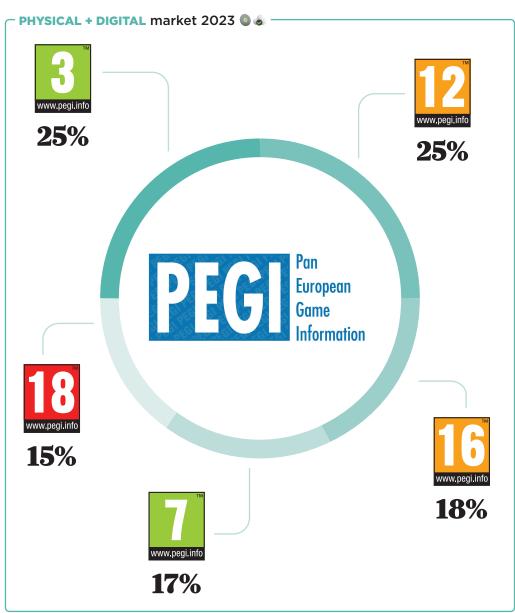
PARENT BEHAVIOUR TOWARDS VIDEO GAMES



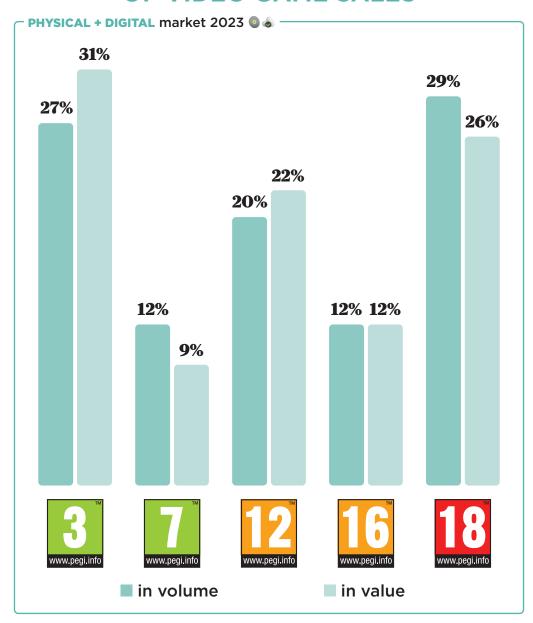
Knowledge and use of parental control systems 93% SAY THEY ARE AWARE OF PARENTAL CONTROL 41% do not know about know about parental control and use it parental control know about parental **52%** control but do not use it



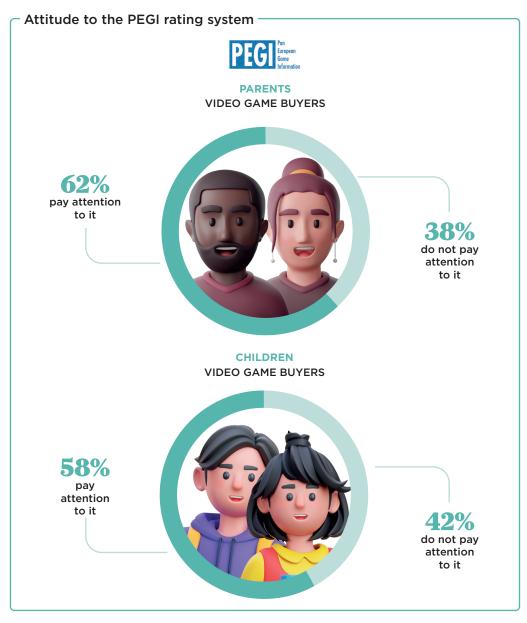
BREAKDOWN OF THE VIDEO GAMES MARKET



BREAKDOWN OF VIDEO GAME SALES



THE ACT OF BUYING AND THE PEGI RATING SYSTEM



PAN GAME **EUROPEAN** 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.

https://pegi.info/20/

aunched in spring 2003, PEGI has replaced a cer tain 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 European federation for video games (VGE - Video Games Europe).

WHAT DO THE LABELS MEAN?

The PEGI labels appear on the front and back of the cover and on the online platforms, 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 next page) on the back cover or on the page of the game/platform indicate the main reasons why a game has a specific age rating.

CREATED IN 2003

NEARLY 40.000 RATED GAMES AND MILLIONS OF APPS

PRESENT 40 COUNTRIES

FEDERATING OVER 2,700 MEMBER COMPANIES

AGE LABELS



Suitable for all ages. Mild violence in a comical context.





Unrealistic. Implicit violence, cartoon, fun. Frightening scenes for young children.



Violence towards fantasy characters or unrealistic violence









Realistic violence towards human characters. Sports action with presence of blood. Strong bad language, horror, drug use. Representation of criminal activity.









Glamorisation of drugs. Sexual expression or activity.

CONTENT **DESCRIPTORS**



This game contains bad language.



This game encourages and/or teaches gambling.



drugs (including tobacco and



This game shows nudity and/or sexual behaviour or makes sexual references.



The game allows the player to buy digital goods with real money.



This game contains violent scenes.



This game may frighten young children.



This game contains images which may encourage discrimination.

HOW DOES G IT WORK?

Every commercialised version of a video game must be approved by PEGI before release. This approval is granted following an assessment by two independent institutes: Nicam (responsible for PEGI 3 and 7 games) and GRA (responsible for PEGI 12, 16 and 18 games) to smooth the process.

NICAM

The Nicam (Netherland Institute for the Classification of Audiovisual Media) was founded in 1999, with the support of the Dutch government, in response to the European Commission's order to protect young audiences from unsuitable audiovisual content. Given its extensive expertise in approving audiovisual content, PEGI works with Nicam to approve video games for young audiences (PEGI 3, PEGI 7) published in Europe.



The GRA (Games Rating Authority) is an organisation that was founded in 1989 to hold producers of video content - both interactive and non-interactive - accountable for their role in disseminating inappropriate images to the public. Since its inception, the GRA has been responsible for approving games published in the UK. This led PEGI to entrust the British organisation with the task of approving PEGI 12, PEGI 16 and PEGI 18 games in 2003.

THE RATING PROCESS

ANALYSING THE CONTENT

Publishers complete a closed-ended questionnaire to determine a provisional rating.

2 PLAYING FOR VALIDATION PURPOSES

The approving officers explore all features of the game to confirm that the answers provided apply to the version under examination.

ISSUING THE RATING

The provisional rating is approved or modified within 4 to 10 days. PEGI then issues a licence to the publisher. authorising the use of age labels and descriptors.

4 INFORMING CONSUMERS

The publisher must display the relevant logos on the game box, as well as on its website and in its promotional communications and materials.

PARENTAL CONTROL SYSTEMS

To help families establish rules for playing video games, all consoles have a parental control system. They are easy to activate and configure, so children can enjoy their video games in a digital environment perfectly suited to their age. But why use a parental control system?

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

Every age takes pleasure in different things. Not all video games are intended for children. That's why the PEGI rating system makes things much easier, providing clear information on this particular issue. Parental control systems take this into account, preventing children from playing games inappropriate for their age.

ESTABLISHING A CHILD'S PLAYTIME

Most solutions allow parents to define digital activity times. This usually concerns playing video games. It is therefore possible to set out a schedule for each day, indicating periods when a child is allowed to play video games. Outside these periods, they will be unable to play video games. This feature can be particularly useful when older children are at home alone, preventing them from playing video games beyond their allocated time slots. Some solutions even offer remote monitoring via an app!

REGULATING INTERNET BROWSING

Parental control systems allow you to authorise or block internet browsing while restricting access to certain sites. For example, before you give your child your tablet or computer, make sure that they are unable to access offensive content, pornographic sites or online gambling. Parental control systems allow you to identify the exact sites to which your children have access, ensuring a pleasant browsing experience. Sometimes, it is even possible to identify keywords that should be blocked automatically.

PROTECTING YOUR PRIVACY

Parental control systems can also prevent your children from sharing personal information with strangers. For example, some disable the option to enter personal details in a questionnaire. They can also block chats or prevent access to forums.

RESTRICTING ACCESS

Whether it's a smartphone, tablet or laptop, not all content on your device is intended for your children. When you lend them your device, you may want to make sure that they are unable to look through your personal files. It would be a real shame if they accidentally deleted all your family photos that you had carefully arranged into folders. Parental control systems can restrict access to certain areas, applications and folders.





Learn more about the Nintendo Switch's parental control system on the Nintendo website

nintendo.co.uk/ Parental-control-of-Switch-1183145.html



Learn more about the Xbox Series X|S and **Xbox One parental** control system on the Xbox website

for-everyone/ responsible-gaming



Learn more about the PS4 and PS5 parental control system on the PlayStation website



To find out more and install your parental control systems step by step, please visit the PédaGoJeux website

INITIATIVES & CAMPAIGNS

SELL's main aim is to provide information and raise awareness among families and players. As a founding member of the PédaGoJeux collective and a steering committee member of the PEGI age rating system, SELL runs large-scale campaigns every year to raise awareness about these best practices among families and to encourage parents to adopt them.



2016 "There's an age for everything. There is a video game for every age."

Cinema and web campaign.



2017 Three rules for better video game fun

Published an advertorial in 11 general public magazines.



2018 PEGI Documentary

Produced a documentary: PEGI teams explained how the organisation operates, as well as each stage of the rating process.



2018 The PEGI Guide

Produced an information guide on the PEGI system.



2019 "Good play. good memories"

TV and web ad about PEGI, PédaGoJeux and parental control systems.



2020-2021 **#ITSYOURTURNTOPLAY!**

Digital awareness campaigns to encourage parents to install and configure parental control systems.



2022 "A new look at screens"

A digital campaign that explains screen use and raises awareness of the need to install parental control systems.



2023 Partner of Safer Internet Day

Safer Internet prevention campaign.

ONLINE INTERACTIONS AND MODERATION

Some video games allow players to connect and interact with others while playing. In the case of children, these interactions could be with school friends or other players that you or your child do not know. As a parent, you always have the option to block your child's online interactions while they are playing, including the option to block other players, restrict communication features entirely or limit the features of certain games.

While playing, and without interfering with the game, your child can block or unblock troublemaker players, preventing them from sending messages or taking part in voice chats. When these players are blocked, your child will no longer receive friend requests, messages or invitations to play from them. Even if you don't play with your child, make sure they know that they are able to do that. As a parent, you want to give your child the tools they need to make the right decisions. And if your child knows that you are paying attention, it will

be easier and more natural for them to share their online experience with you.

Although rare, if you or your child come across inappropriate behaviour, such as foul language, bullying, trolling, unwanted or inappropriate advances, threatening behaviour or other players encouraging self-harm, you can report it immediately using the built-in reporting tools. Each report is reviewed by a team of moderators to determine whether the content violates community rules or the code of conduct of the online platform on which it is posted.

If this is the case, the content will be removed and appropriate action will be taken against the player who shared it. It should also be noted that suspended players have no way of knowing who filed the complaint at the time of registration. This protects your privacy and ensures your safety.

For more information, please visit the SELL website.



PÉDAGOJEUX VIDEO GAMES EXPLAINED TO PARENTS

For some parents, it can be difficult to understand the uses and practices surrounding video games. How to support your child? How to know which game to choose for your child? Why and how to set the rules? What games should you play with them? Where can you go for advice if you think your child is spending too long playing video games? You can find practical answers to all these questions on www.pedagojeux.fr.

Founded in 2008, the aim of the PédaGoJeux collective is to inform parents and educational providers about the practices and uses of video games.

Run by Unaf (National Union of Family Associations), PédaGoJeux draws on the expertise and diversity of its members (Unaf, Ministry of Family Affairs, Internet sans crainte [Internet without fear], SELL [Union of Video Game Publishers 1. Jeux On Line [Online Games]. Eyesight Improvement Association (Asnav) and Action Innocence Monaco) to provide independent and objective information.

PédaGoJeux explains the challenges of video games, indicating the keys to a pleasant video game experience and addressing things to watch out for, On the PédaGoJeux website, parents and professionals can access advice, practical information sheets, files and many other resources that address all these aspects of video games.

To extend its action on the ground and operate as closely as possible to parents, PédaGoJeux has been federating a network of Ambassadors since 2014. More than two hundred charities and public organisations are engaged in many efforts in the field. at both the national and local levels (schools, local authorities, libraries, media libraries, toy libraries, sports charities, etc.), to promote a pleasant video game experience in family households.



CHAPTER



THE UNION
OF VIDEO
GAME
PUBLISHERS





About us

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

With twenty-four members, including two 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.

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 joined several organisations and working groups.

INTERMINISTERIAL WORKING GROUP made up of the DGE, the CNC, the National Video Game Union (SNJV), SELL and Ubisoft.

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

ARCOM: member of the Child Protection Commission.

STRATEGIC GUIDANCE of the National Digital Council.

VGE (VIDEO GAMES EUROPE): board member.
FRANCE ESPORTS: board member.



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 and promote inclusion, diversity, digital sobriety and accessibility.

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.

PEGI is present in thirty-eight countries, has ratified over thirty-five thousand games and millions of apps and has over two thousand five hundred member companies.

PÉDAGOJEUX: a collective created in 2008 bringing together people from public bodies, the video games industry and charities. This collective has a mission to raise awareness and help people understand video games.

SUPPORTING ORGANISATIONS PROMOTING RESPONSIBLE INCLUSION:

Women in Games to promote diversity, CapGame to develop accessibility and Silver Geek for intergenerational connection.

Promoting video games

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

IDEF: created in 2006 by SELL, the Interactive & Digital Entertainment Festival is an event for French stakeholders in the video game and interactive leisure activity market. It takes place every year in

the early summer. Developers, publishers, accessory manufacturers and distributors come together for business meetings to structure the end of the year.

PARIS GAMES WEEK: the 2023 "Next Level" edition welcomed 180,000 visitors and 142 exhibitors across three halls, attracting a loyal audience as well as new visitors drawn by a renewed offer. This latest edition marks a turning point in the history of PGW, which has opened up to the new worlds of pop culture.



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 player purchasing and use. Several panels are used to carry out this analysis.

GSD PANEL, GAME SALES DATA (DISTRIBUTORS AND DIGITAL): VGE/Sparkers
GAMETRACK PANEL (CONSUMERS): VGE/IPSOS DATALAI PANEL (MOBILE): VGE
IDC PANEL (PC GAMING HARDWARE AND SCREENS): SELL
OTHER SURVEYS: French people and video games, SELL/Médiamétrie

MEMBERS

















































BOARD OF DIRECTORS

CHRISTOPHE HAVART

Bandai Namco Entertainment

SOPHIE CARABALONA

Electronic Arts

GEOFFROY SARDIN

Focus Entertainment

YVES BLEHAUT

Microids

CÉDRIC MIMOUNI

Microsoft

PHILIPPE LAVOUÉ

Nintendo

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Plaion

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Sony Interactive Entertainment

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Square Enix

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Take-Two Interactive

BÉNÉDICTE GERMAIN

Ubisoft

YVES ELALOUF

Warner Bros. Games

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