

MARCH 2021

# ESSENTIAL

## VIDEO GAME NEWS



FRENCH MARKET  
REPORT 2020

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

MARCH 2021

# ESSENTIAL

## VIDEO GAME NEWS

<b>CHAPTER 1</b>	THE FRENCH VIDEO GAME MARKET	08
<b>CHAPTER 2</b>	PROFILES OF FRENCH VIDEO GAME PLAYERS	44
<b>CHAPTER 3</b>	TYPOLGY OF VIDEO GAME PLAYERS	50
<b>CHAPTER 4</b>	A RESPONSIBLE INDUSTRY	58
<b>CHAPTER 5</b>	SELL	68

# A WORD FROM THE CHAIRWOMAN



2020 will stand as a unique year for our sector. Firstly - and independently of the health crisis we have experienced - this year was always going to be exceptional. The release of two new consoles in the same year, the rise

of cloud video games and the many new software innovations predicted an extremely dynamic year. And then the epidemic arrived with its impact on this particular situation. For many French people in lockdown, video gaming was a lifeline that entertained them and helped them chat, share and escape a very gloomy reality. More than ever in 2020, video gaming revealed its eminently social characteristics.

In 2020, the video game industry posted its best performance, achieving historic sales of 5.3 billion euros. This growth of +11.3% demonstrates a high increase in the engagement of all players. In total, 27.5 million games, 2.3 million consoles and 7 million accessories were sold over the year.

All ecosystems are posting growth: the Console ecosystem grew by +10% and represents 51% total video game market share, PC video games by +9% and Mobile video games by +16%.

For games sales, video games experienced a record year: sales of complete video games for consoles saw +79% growth in one year. Sales of physical games showed quite remarkable resistance with a moderate fall of -3.2% despite a difficult context for physical distribution. Console software turnover is still dominated by physical game sales which represent 38% in value. 36% of this value is generated by digital game sales and 15% by additional downloadable content and micro-transactions.

## A WORD FROM THE CHAIRWOMAN

The video game industry continues to play an essential role for technological, cultural and creative industries. The innovations experienced first by video game players are often generalised through video gaming before transitioning to other sectors and industries. Video gaming is a "laboratory" of innovations where creative freedom has no boundaries.

2020 was essential for the video game industry's ambition for recognition. It is now established as a media in its own right, offering many opportunities beyond its primary function as entertainment.

**The release of two new consoles in the same year, the rise of cloud video games and the many new software innovations predicted an extremely dynamic year.**

As you know, the cancellation of Paris Games Week was a difficult but necessary decision. We do not yet know what this year has in store, but we are already working on putting on an exceptional edition for the show's faithful audience, as soon as the situation allows. Video game players tell us every day how much they are looking forward to this event as do all those involved in this exciting adventure.

Once again this year, the video game industry will be there, going above and beyond this difficult situation to continue entertaining and delivering dreams to even more video game players.

Take care,  
**Julie Chalmette**

# PANELS AND METHODOLOGY

ESTIMATIONS FOR 2020 TURNOVER ARE THE RESULT OF COLLABORATION BETWEEN THREE ORGANISATIONS PROVIDING SELL THEIR DATA, FOR A PRECISE ANALYSIS OF THE SECTOR'S ACTIVITY.

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



## 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 complete game 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.

## ABOUT GSD (GAME SALES DATA)

Launched in 2013, the GSD project is the result of a European project run by the ISFE (Interactive Software Federation of Europe) with around a hundred partners, with the aim of unifying data collection from different territories and regrouping this data (physical or digital) within one tool available to trade associations, distributors and video game publishers participating in the panel. 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.



# GAMETRACK



video game players, their buying behaviour across all platforms, helping to generate an in-depth view of their gameplay habits and uses. The countries covered are France, the UK, Germany and Spain and also the United States and Russia. GameTrack supports the GSD project by providing a more global vision of the markets in which it operates.

## METHODOLOGY:

GameTrack data is collated quarterly from two surveys:

- An offline survey carried out annually on a sample 1,000 people aged 15 and over. 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.

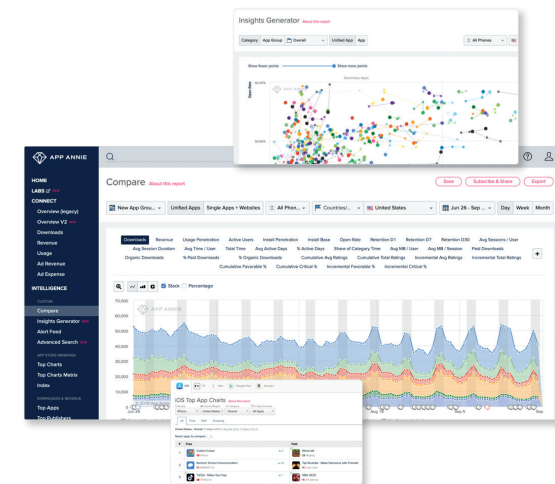
## ABOUT GAMETRACK

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



## 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.





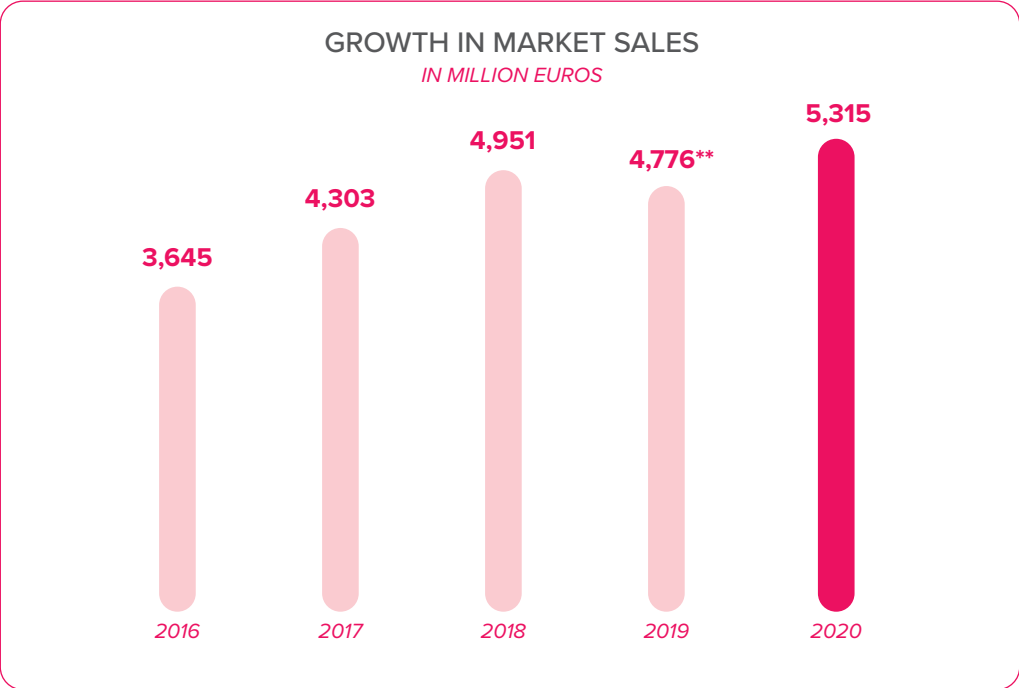
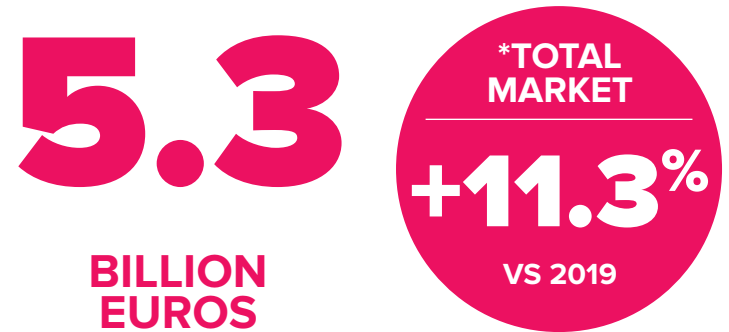
CHAPTER 1

# THE FRENCH VIDEO GAME MARKET



# 2020 MARKET REPORT

## TOTAL SALES



Sources: SELL data, from GSD/GameTrack/App Annie panels at end 2020.  
\*\*Sources: SELL data, from GSD/GameTrack panels at end 2020.  
\*\* Data revised in 2020.

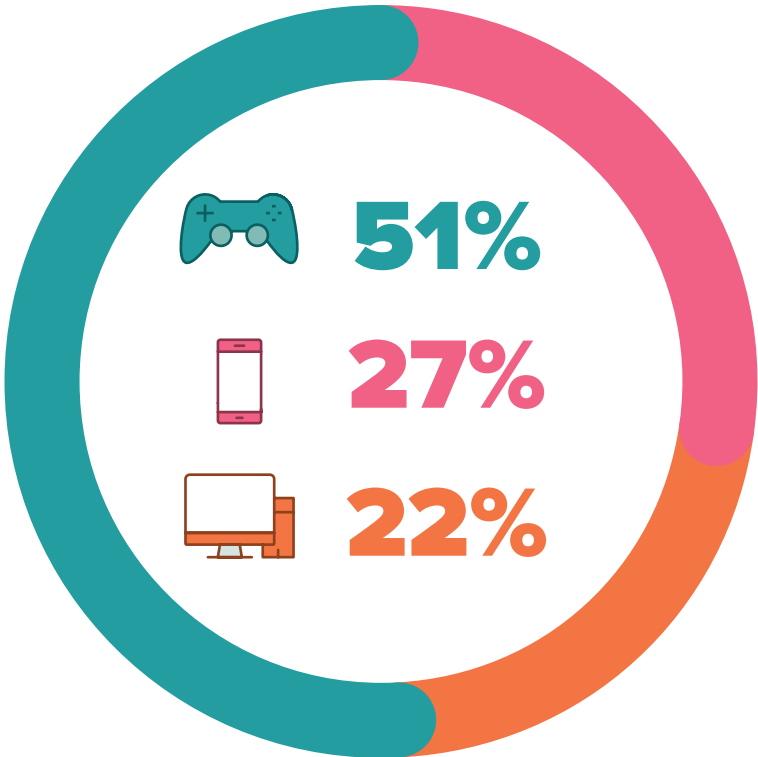
# SALES AND MARKET SHARE

## BY ECOSYSTEM\*

CONSOLE  
ECOSYSTEM\*\*  
**2.707**  
BILLION EUROS

MOBILE  
ECOSYSTEM\*\*\*  
**1.426**  
BILLION EUROS

PC  
ECOSYSTEM\*\*  
**1.182**  
BILLION EUROS



\*Ecosystems: Console + PC + mobile, physical and digital.

\*\*Sources: SELL data, from GSD/GameTrack panels at end 2020.

\*\*\* Source: GameTrack estimations using user spending data from App Annie 2020, converted into euros and including French taxes.

# GROWTH IN SALES

BY ECOSYSTEM\*

CONSOLE  
ECOSYSTEM\*\*



+10%

PC  
ECOSYSTEM\*\*



+9%

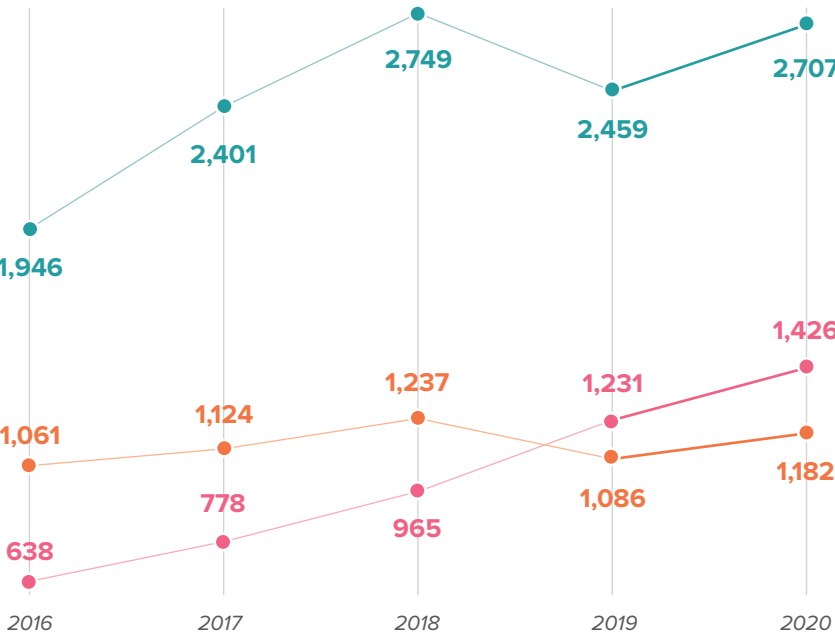
MOBILE  
ECOSYSTEM\*\*\*



+16%

VS 2019

GROWTH IN ECOSYSTEM SALES  
IN MILLION EUROS



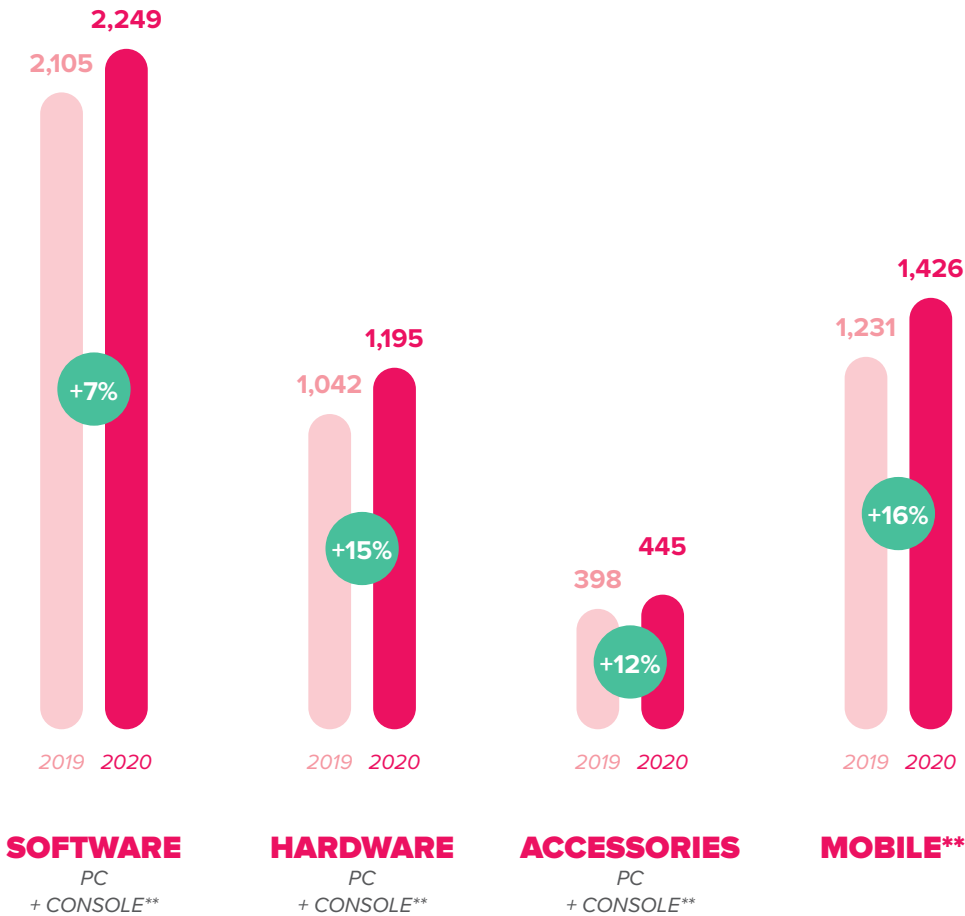
\*Ecosystems: Console + PC + mobile, physical and digital.

\*\*Sources: SELL data, from GSD/GameTrack panels at end 2020.

\*\*\* Source: GameTrack estimations using user spending data from App Annie 2020, converted into euros and including French taxes.

# MARKET SEGMENTS BREAKDOWN OF SALES\*

IN MILLION EUROS

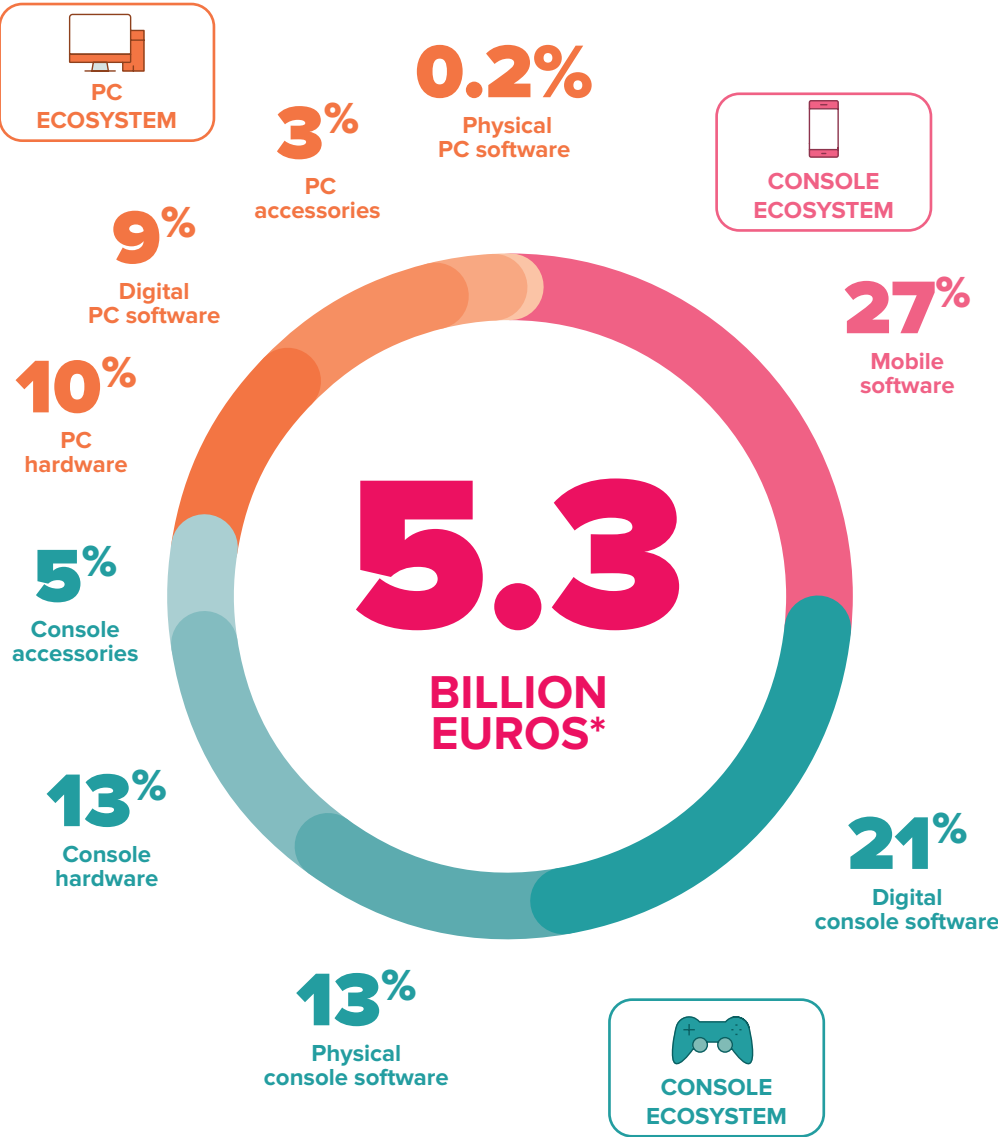


\*Ecosystems: Console + PC + mobile, physical and digital.

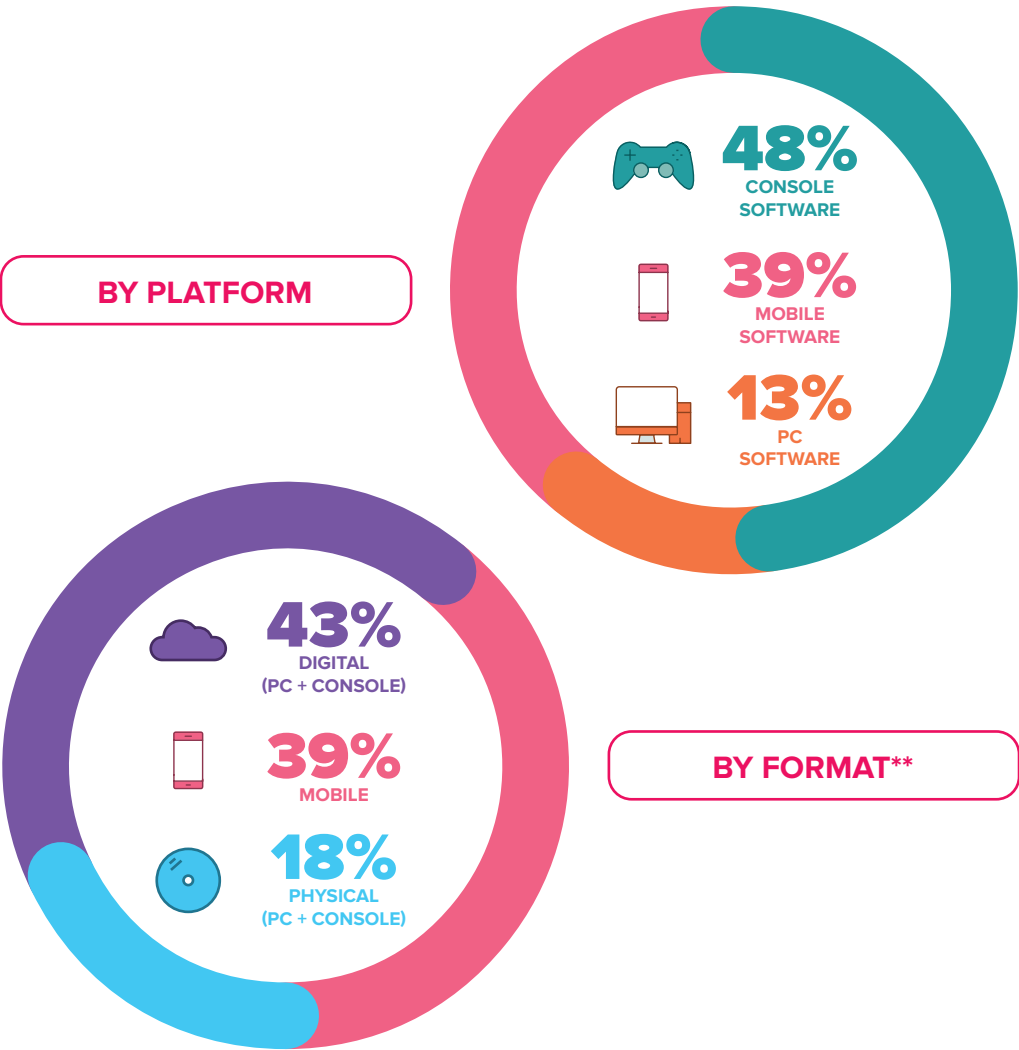
\*\*Sources: SELL data, from GSD/GameTrack panels at end 2020.

\*\*\* Source: GameTrack estimations using user spending data from App Annie 2020, converted into euros and including French taxes.

# CLOSE-UP ON SEGMENTS: MARKET SHARE



# CLOSE-UP ON SOFTWARE BREAKDOWN OF SALES\*

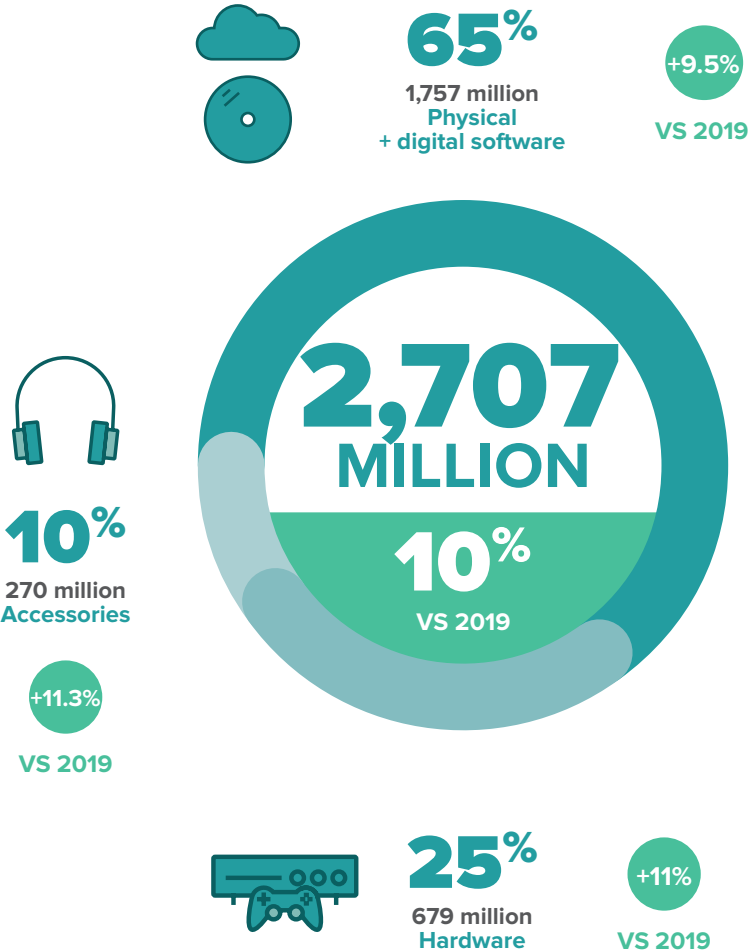


\*SELL data, from GSD, GameTrack, App Annie Intelligence panels at end 2020.

\*SELL data, from GSD, GameTrack, App Annie Intelligence panels at end 2020.  
\*\* Physical = complete physical games.  
Digital = complete video games + additional content (DLC, season passes, micro-transactions, subscriptions and services)

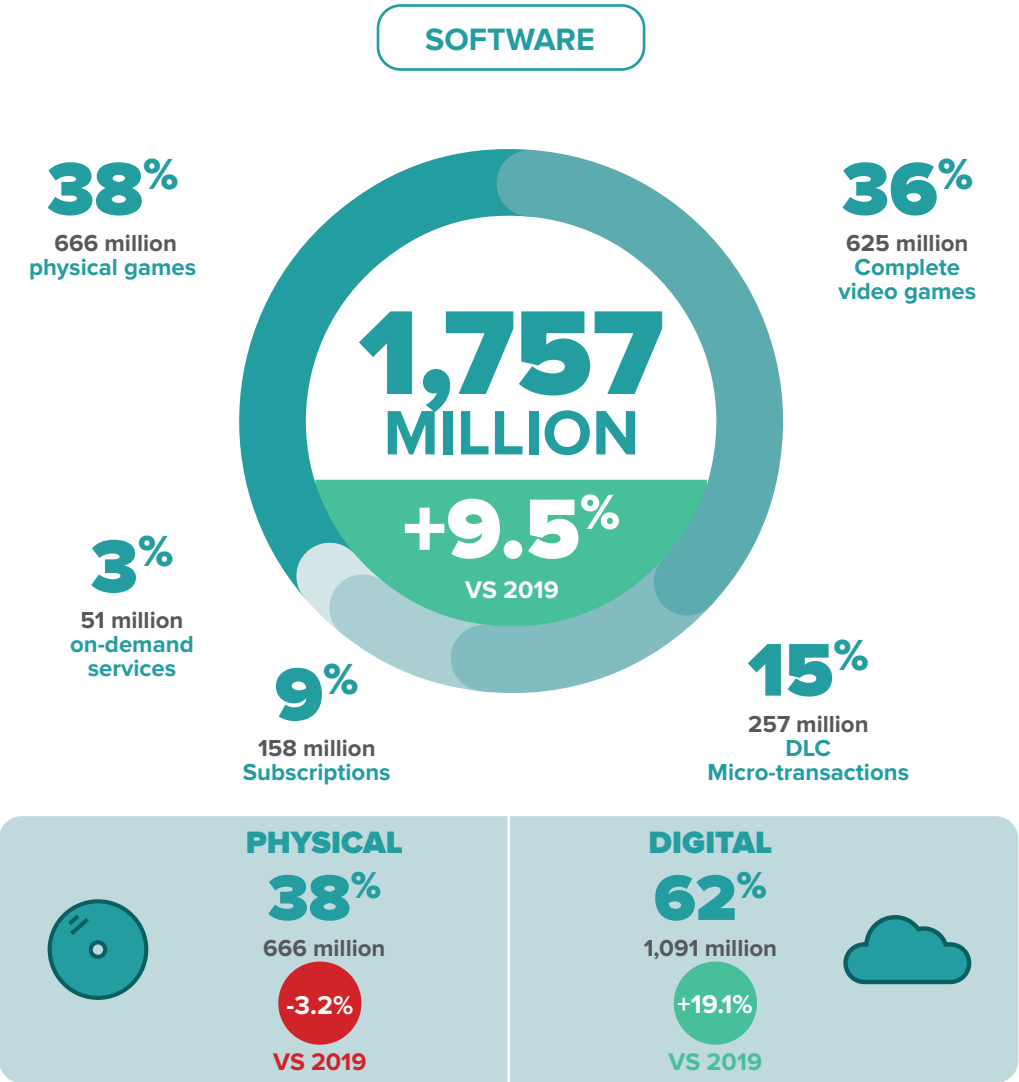
# CONSOLE ECOSYSTEM

## BREAKDOWN OF 2020 SALES IN EUROS



# CONSOLE ECOSYSTEM

## GROWTH AND BREAKDOWN OF 2020 SALES IN EUROS

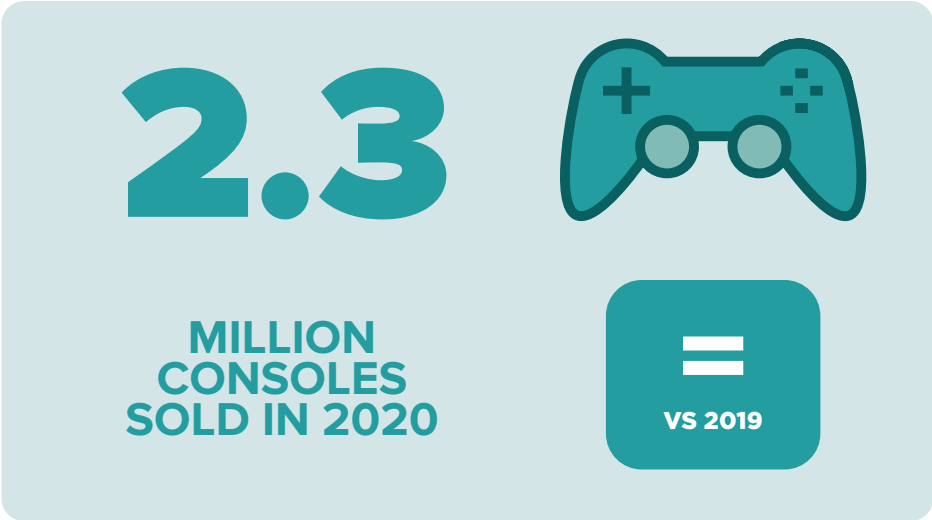


# CONSOLE ECOSYSTEM

GROWTH IN SALES FOR 2020

HARDWARE

679 MILLION EUROS +11% VS 2019



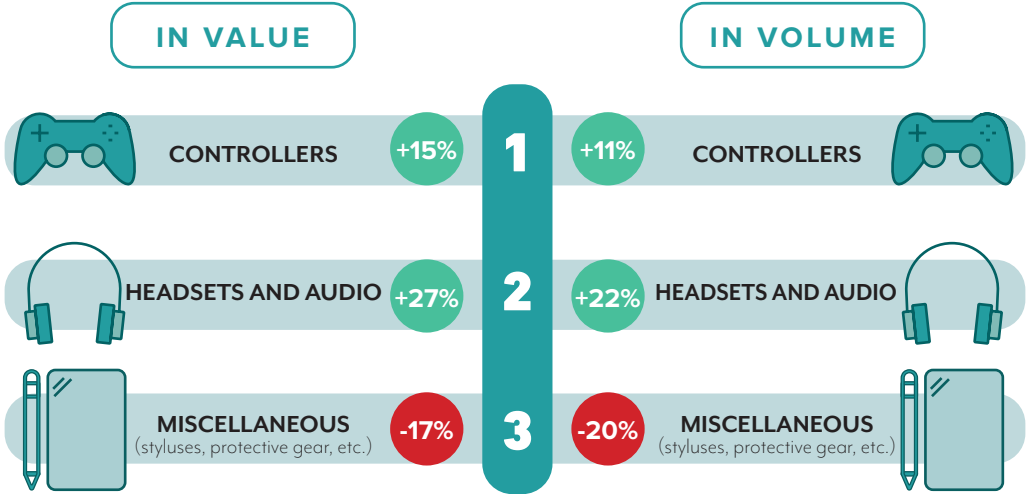
# CONSOLE ECOSYSTEM

GROWTH IN SALES FOR 2020

ACCESSORIES

270 MILLION EUROS +11.3%\* VS 2019

## TOP 3 CONSOLE ACCESSORIES




# TOP 20 GAMES IN 2020

## ALL PLATFORMS


### PHYSICAL MARKET IN VALUE

1




ANIMAL CROSSING:  
NEW HORIZONS  
Nintendo  
53,706,186 €

2



FIFA 21  
Electronic Arts  
52,050,423 €

3



MARIO KART 8  
DELUXE  
Nintendo  
27,115,565 €

4	Assassin's Creed Valhalla	UBISOFT	24,134,813 €
5	The Last of Us Part II	SONY INTERACTIVE ENTERTAINMENT	21,514,241 €
6	Call of Duty: Black Ops Cold War	ACTIVISION BLIZZARD	19,808,766 €
7	Ring Fit Adventure	NINTENDO	17,592,009 €
8	Super Mario 3D All-Stars	NINTENDO	16,383,252 €
9	Luigi's Mansion 3	NINTENDO	11,986,582 €
10	The Legend Of Zelda: Breath of the Wild	NINTENDO	11,631,530 €
11	New Super Mario Bros. U Deluxe	NINTENDO	11,273,206 €
12	Cyberpunk 2077	BANDAI NAMCO ENTERTAINMENT	11,214,094 €
13	Ghost of Tsushima	SONY INTERACTIVE ENTERTAINMENT	10,721,432 €
14	Super Mario Party	NINTENDO	10,422,268 €
15	Spider-Man: Miles Morales	SONY INTERACTIVE ENTERTAINMENT	8,945,297 €
16	51 Worldwide Games	NINTENDO	8,788,626 €
17	Dragon Ball Z: Kakarot	BANDAI NAMCO ENTERTAINMENT	8,696,040 €
18	Minecraft: Nintendo Switch Edition	MICROSOFT	8,519,377 €
19	Pokémon Sword	NINTENDO	8,086,911 €
20	Hyrule Warriors: Age of Calamity	NINTENDO	7,873,697 €


Sources: SELL data, from GSD/GameTrack panels at end 2020. Excluding bundles.

# TOP 20 GAMES IN 2020

## ALL PLATFORMS


### PHYSICAL MARKET IN VOLUME

1




ANIMAL CROSSING:  
NEW HORIZONS  
Nintendo  
1,079,290

2



FIFA 21  
Electronic Arts  
929,610

3



MARIO KART 8  
DELUXE  
Nintendo  
553,803


4	Assassin's Creed Valhalla	UBISOFT	389,952
5	The Last of Us Part II	SONY INTERACTIVE ENTERTAINMENT	345,792
6	Call of Duty: Black Ops Cold War	ACTIVISION BLIZZARD	330,220
7	Super Mario 3D All-Stars	NINTENDO	323,792
8	Minecraft: Nintendo Switch Edition	MICROSOFT	303,007
9	Ring Fit Adventure	NINTENDO	261,436
10	51 Worldwide Games	NINTENDO	257,545
11	Luigi's Mansion 3	NINTENDO	243,734
12	New Super Mario Bros. U Deluxe	NINTENDO	228,963
13	Super Mario Party	NINTENDO	212,217
14	The Legend Of Zelda: Breath of the Wild	NINTENDO	205,983
15	Grand Theft Auto V	TAKE-TWO INTERACTIVE	188,738
16	FIFA 20	ELECTRONIC ARTS	187,229
17	Cyberpunk 2077	BANDAI NAMCO ENTERTAINMENT	177,659
18	Ghost of Tsushima	SONY INTERACTIVE ENTERTAINMENT	167,531
19	Hyrule Warriors: Age of Calamity	NINTENDO	162,320
20	Pokémon Sword	NINTENDO	158,598

Sources: SELL data, from GSD/GameTrack panels at end 2020. Excluding bundles.

TOP 20 GAMES IN 2020  
ALL PLATFORMS

PHYSICAL + DIGITAL MARKET IN VALUE

1



FIFA 21  
Electronic Arts  
76,944,734 €

2



ANIMAL CROSSING:  
NEW HORIZONS  
Nintendo  
53,706,186 €

3



CALL OF DUTY:  
BLACK OPS COLD WAR  
Activision Blizzard  
43,225,562 €


4	Assassin's Creed Valhalla	UBISOFT	37,451,785 €
5	The Last of Us Part II	SONY INTERACTIVE ENTERTAINMENT	27,418,985 €
6	Mario Kart 8 Deluxe	NINTENDO	27,114,873 €
7	Call of Duty: Modern Warfare	ACTIVISION BLIZZARD	22,380,692 €
8	Ring Fit Adventure	NINTENDO	17,591,700 €
9	FIFA 20	ELECTRONIC ARTS	17,234,526 €
10	Super Mario 3D All-Stars	NINTENDO	16,383,252 €
11	Ghost of Tsushima	SONY INTERACTIVE ENTERTAINMENT	15,466,153 €
12	Final Fantasy VII Remake	SQUARE ENIX	13,459,703 €
13	Dragon Ball Z: Kakarot	BANDAI NAMCO ENTERTAINMENT	13,332,175 €
14	Grand Theft Auto V	TAKE-TWO INTERACTIVE	12,899,465 €
15	Luigi's Mansion 3	NINTENDO	11,985,984 €
16	The Legend Of Zelda: Breath of the Wild	NINTENDO	11,631,157 €
17	Spider-Man: Miles Morales	SONY INTERACTIVE ENTERTAINMENT	11,280,487 €
18	New Super Mario Bros. U Deluxe	NINTENDO	11,272,823 €
19	Cyberpunk 2077	CD PROJEKT RED	11,214,094 €
20	Super Mario Party	NINTENDO	10,421,940 €

Sources: SELL data, from GSD/GameTrack panels at end 2020. Excluding bundles.  
This listing does not include Nintendo digital sales data.

TOP 20 GAMES IN 2020  
ALL PLATFORMS

PHYSICAL + DIGITAL MARKET IN VOLUME

1



FIFA 21  
Electronic Arts  
1,324,565

2



ANIMAL CROSSING:  
NEW HORIZONS  
Nintendo  
1,079,290

3



CALL OF DUTY:  
BLACK OPS COLD WAR  
Activision Blizzard  
664,792

4	Grand Theft Auto V	TAKE-TWO INTERACTIVE	602,423
5	Assassin's Creed Valhalla	UBISOFT	565,925
6	Mario Kart 8 Deluxe	NINTENDO	553,789
7	FIFA 20	ELECTRONIC ARTS	537,097
8	The Last of Us Part II	SONY INTERACTIVE ENTERTAINMENT	434,486
9	Call of Duty: Modern Warfare	ACTIVISION BLIZZARD	385,214
10	Super Mario 3D All-Stars	NINTENDO	323,792
11	Minecraft: Nintendo Switch Edition	MICROSOFT	302,999
12	NBA 2k20	TAKE-TWO INTERACTIVE	269,607
13	Ring Fit Adventure	NINTENDO	261,432
14	51 Worldwide Games	NINTENDO	257,545
15	Luigi's Mansion 3	NINTENDO	243,722
16	Ghost of Tsushima	SONY INTERACTIVE ENTERTAINMENT	236,560
17	New Super Mario Bros. U Deluxe	NINTENDO	228,955
18	Super Mario Party	NINTENDO	212,211
19	Dragon Ball Z: Kakarot	BANDAI NAMCO ENTERTAINMENT	206,697
20	The Legend Of Zelda: Breath of the Wild	NINTENDO	205,976

Sources: SELL data, from GSD/GameTrack panels at end 2020. Excluding bundles.  
This listing does not include Nintendo digital sales data.




# TOP 20 GAMES IN 2020

## BY PLATFORM

### PHYSICAL MARKET IN VALUE

1




SWITCH

ANIMAL CROSSING:  
NEW HORIZONS

Nintendo

53,706,186 €

2




PS4

FIFA 21

Electronic Arts

40,133,320 €

3



SWITCH

MARIO KART 8  
DELUXE

Nintendo

27,115,565 €


4	The Last of Us Part II	PS4	SONY INTERACTIVE ENTERTAINMENT	19,607,024 €
5	Ring Fit Adventure	SWITCH	NINTENDO	17,592,009 €
6	Super Mario 3D All-Stars	SWITCH	NINTENDO	16,383,252 €
7	Assassin's Creed Valhalla	PS4	UBISOFT	14,750,716 €
8	Call of Duty: Black Ops Cold War	PS4	ACTIVISION BLIZZARD	13,537,966 €
9	Luigi's Mansion 3	SWITCH	NINTENDO	11,986,582 €
10	The Legend Of Zelda: Breath of the Wild	SWITCH	NINTENDO	11,584,450 €
11	New Super Mario Bros. U Deluxe	SWITCH	NINTENDO	11,273,206 €
12	Super Mario Party	SWITCH	NINTENDO	10,422,268 €
13	Ghost of Tsushima	PS4	SONY INTERACTIVE ENTERTAINMENT	9,289,509 €
14	51 Worldwide Games	SWITCH	NINTENDO	8,788,626 €
15	Minecraft: Nintendo Switch Edition	SWITCH	MICROSOFT	8,519,377 €
16	Hyrule Warriors: Age of Calamity	SWITCH	NINTENDO	7,873,697 €
17	Super Smash Bros. Ultimate	SWITCH	NINTENDO	7,630,404 €
18	Cyberpunk 2077	PS4	CD PROJEKT RED	7,303,471 €
19	Mario & Sonic at the Tokyo 2020 Olympic Games	SWITCH	SEGA	7,193,427 €
20	Pokémon Sword	SWITCH	NINTENDO	7,115,272 €

# TOP 20 GAMES IN 2020

## BY PLATFORM

### PHYSICAL MARKET IN VOLUME

1




SWITCH

ANIMAL CROSSING:  
NEW HORIZONS

Nintendo

1,079,290

2




PS4

FIFA 21

Electronic Arts

696,147

3



SWITCH

MARIO KART 8  
DELUXE

Nintendo

553,803


4	The Last of Us Part II	PS4	SONY INTERACTIVE ENTERTAINMENT	330,406
5	Super Mario 3D All-Stars	SWITCH	NINTENDO	323,792
6	Minecraft: Nintendo Switch Edition	SWITCH	MICROSOFT	303,007
7	Ring Fit Adventure	SWITCH	NINTENDO	261,436
8	51 Worldwide Games	SWITCH	NINTENDO	257,545
9	Assassin's Creed Valhalla	PS4	UBISOFT	248,418
10	Luigi's Mansion 3	SWITCH	NINTENDO	243,734
11	Call of Duty: Black Ops Cold War	PS4	ACTIVISION BLIZZARD	231,936
12	New Super Mario Bros. U Deluxe	SWITCH	NINTENDO	228,963
13	Super Mario Party	SWITCH	NINTENDO	212,217
14	The Legend Of Zelda: Breath of the Wild	SWITCH	NINTENDO	204,890
15	Grand Theft Auto V Premium Edition	PS4	TAKE-TWO INTERACTIVE	162,997
16	Hyrule Warriors: Age of Calamity	SWITCH	NINTENDO	162,320
17	Ghost of Tsushima	PS4	SONY INTERACTIVE ENTERTAINMENT	155,101
18	Just Dance 2021	SWITCH	UBISOFT	145,477
19	Pokémon Sword	SWITCH	NINTENDO	145,200
20	Mario & Sonic at the Tokyo 2020 Olympic Games	SWITCH	SEGA	142,199

# TOP 20 GAMES IN 2020

## BY PLATFORM

### PHYSICAL + DIGITAL MARKET IN VALUE


1



SWITCH

**ANIMAL CROSSING: NEW HORIZONS**  
Nintendo  
**53,706,186 €**


2



PS4

**FIFA 21**  
Electronic Arts  
**49,491,581 €**

3



SWITCH

**MARIO KART 8 DELUXE**  
Nintendo  
**27,115,565 €**

4	<i>The Last of Us Part II</i>	PS4	SONY INTERACTIVE ENTERTAINMENT	24,252,955 €
5	<i>Call of Duty: Black Ops Cold War</i>	PS4	ACTIVISION BLIZZARD	21,023,154 €
6	<i>Assassin's Creed Valhalla</i>	PS4	UBISOFT	20,747,511 €
7	<i>Ring Fit Adventure</i>	SWITCH	NINTENDO	17,591,700 €
8	<i>Super Mario 3D All-Stars</i>	SWITCH	NINTENDO	16,383,252 €
9	<i>Call of Duty: Modern Warfare</i>	PS4	ACTIVISION BLIZZARD	14,524,133 €
10	<i>Ghost of Tsushima</i>	PS4	SONY INTERACTIVE ENTERTAINMENT	12,791,566 €
11	<i>Luigi's Mansion 3</i>	SWITCH	NINTENDO	11,985,984 €
12	<i>The Legend Of Zelda: Breath of the Wild</i>	SWITCH	NINTENDO	11,584,081 €
13	<i>FIFA 20</i>	PS4	ELECTRONIC ARTS	11,508,201 €
14	<i>New Super Mario Bros. U Deluxe</i>	SWITCH	NINTENDO	11,272,823 €
15	<i>Super Mario Party</i>	SWITCH	NINTENDO	10,421,940 €
16	<i>51 Worldwide Games</i>	SWITCH	NINTENDO	8,788,626 €
17	<i>Dragon Ball Z: Kakarot</i>	PS4	BANDAI NAMCO ENTERTAINMENT	8,610,900 €
18	<i>Minecraft: Nintendo Switch Edition</i>	SWITCH	MICROSOFT	8,519,127 €
19	<i>Hyrule Warriors: Age of Calamity</i>	SWITCH	NINTENDO	7,873,697 €
20	<i>FIFA 21</i>	XBOX ONE	ELECTRONIC ARTS	7,762,878 €


Sources: SELL data, from GSD/GameTrack panels at end 2020. Excluding bundles.  
This listing does not include Nintendo digital sales data.

# TOP 20 GAMES IN 2020

## BY PLATFORM

### PHYSICAL + DIGITAL MARKET IN VOLUME


1



SWITCH

**ANIMAL CROSSING: NEW HORIZONS**  
Nintendo  
**1,079,290**


2



PS4

**FIFA 21**  
Electronic Arts  
**847,809**

3



SWITCH

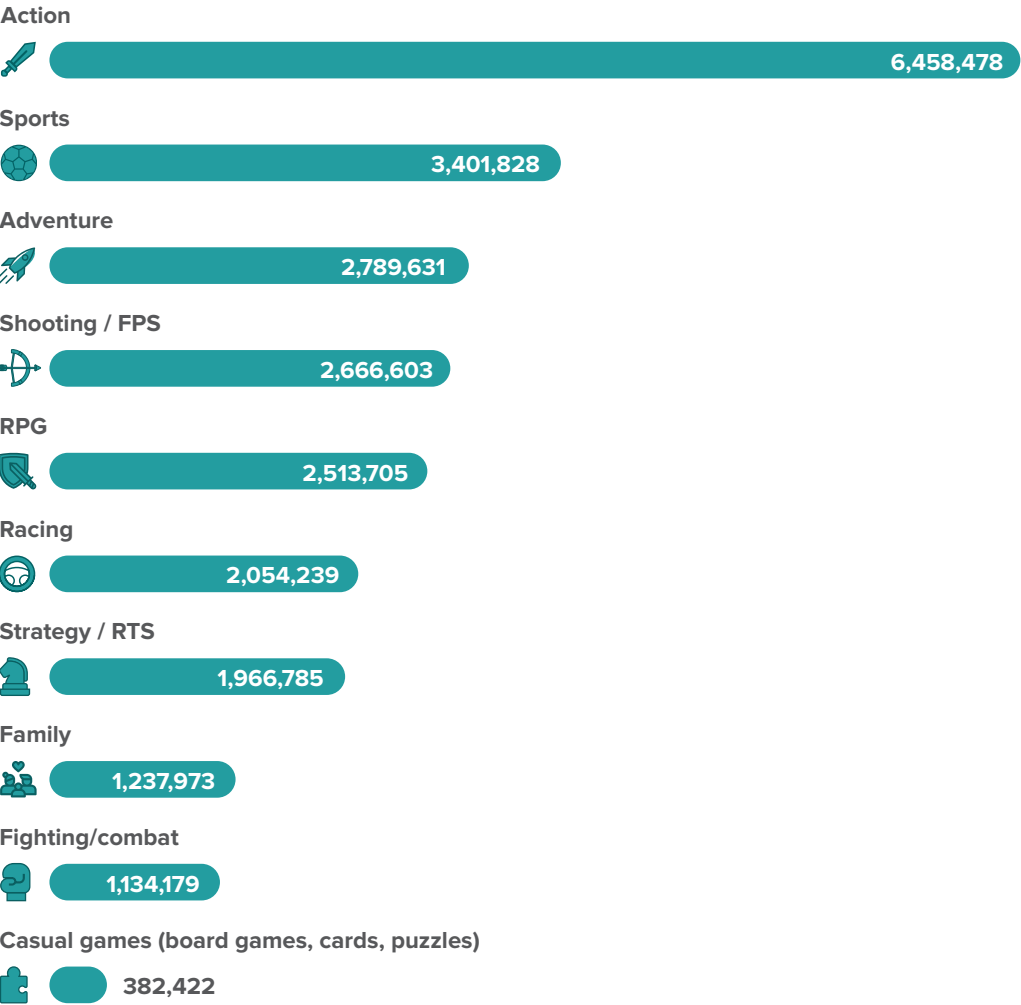
**MARIO KART 8 DELUXE**  
Nintendo  
**553,789**

4	<i>The Last of Us Part II</i>	PS4	SONY INTERACTIVE ENTERTAINMENT	403,129
5	<i>FIFA 20</i>	PS4	ELECTRONIC ARTS	368,701
6	<i>Call of Duty: Black Ops Cold War</i>	PS4	ACTIVISION BLIZZARD	351,247
7	<i>Assassin's Creed Valhalla</i>	PS4	UBISOFT	337,262
8	<i>Super Mario 3D All-Stars</i>	SWITCH	NINTENDO	323,792
9	<i>Minecraft: Nintendo Switch Edition</i>	SWITCH	MICROSOFT	302,999
10	<i>Ring Fit Adventure</i>	SWITCH	NINTENDO	261,432
11	<i>Call of Duty: Modern Warfare</i>	PS4	ACTIVISION BLIZZARD	261,155
12	<i>Grand Theft Auto V</i>	PS4	TAKE-TWO INTERACTIVE	257,866
13	<i>51 Worldwide Games</i>	SWITCH	NINTENDO	257,545
14	<i>Luigi's Mansion 3</i>	SWITCH	NINTENDO	243,722
15	<i>New Super Mario Bros. U Deluxe</i>	SWITCH	NINTENDO	228,955
16	<i>Super Mario Party</i>	SWITCH	NINTENDO	212,211
17	<i>Ghost of Tsushima</i>	PS4	SONY INTERACTIVE ENTERTAINMENT	208,224
18	<i>The Legend Of Zelda: Breath of the Wild</i>	SWITCH	NINTENDO	204,884
19	<i>Just Dance 2020</i>	SWITCH	UBISOFT	185,725
20	<i>Mario + Rabbids Kingdom Battle</i>	SWITCH	UBISOFT	164,510

Sources: SELL data, from GSD/GameTrack panels at end 2020. Excluding bundles.  
This listing does not include Nintendo digital sales data.

# TOP 10 TYPES OF VIDEO GAMES BOUGHT IN 2020

PHYSICAL + DIGITAL MARKET IN VOLUME



Sources: SELL data, from GSD/GameTrack panels at end 2020. Excluding bundles.  
This listing does not include Nintendo digital sales data.

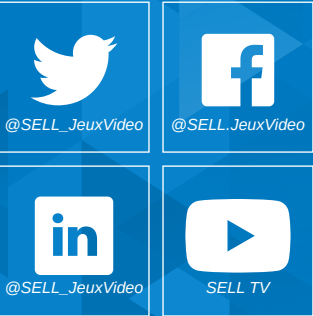


## TOP WEEKLY SALES

Every Monday, discover  
the top video game sales in France

# SELL.FR

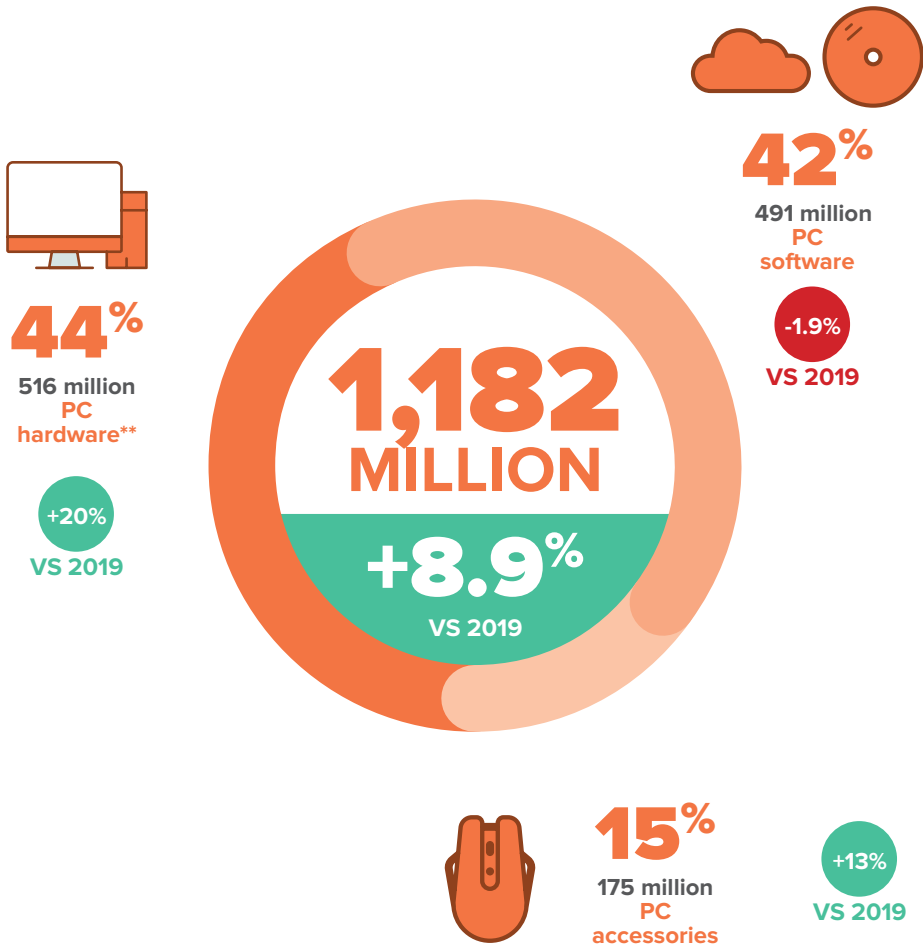
ON SOCIAL MEDIA



OR SUBSCRIBE TO OUR DEDICATED NEWSLETTER

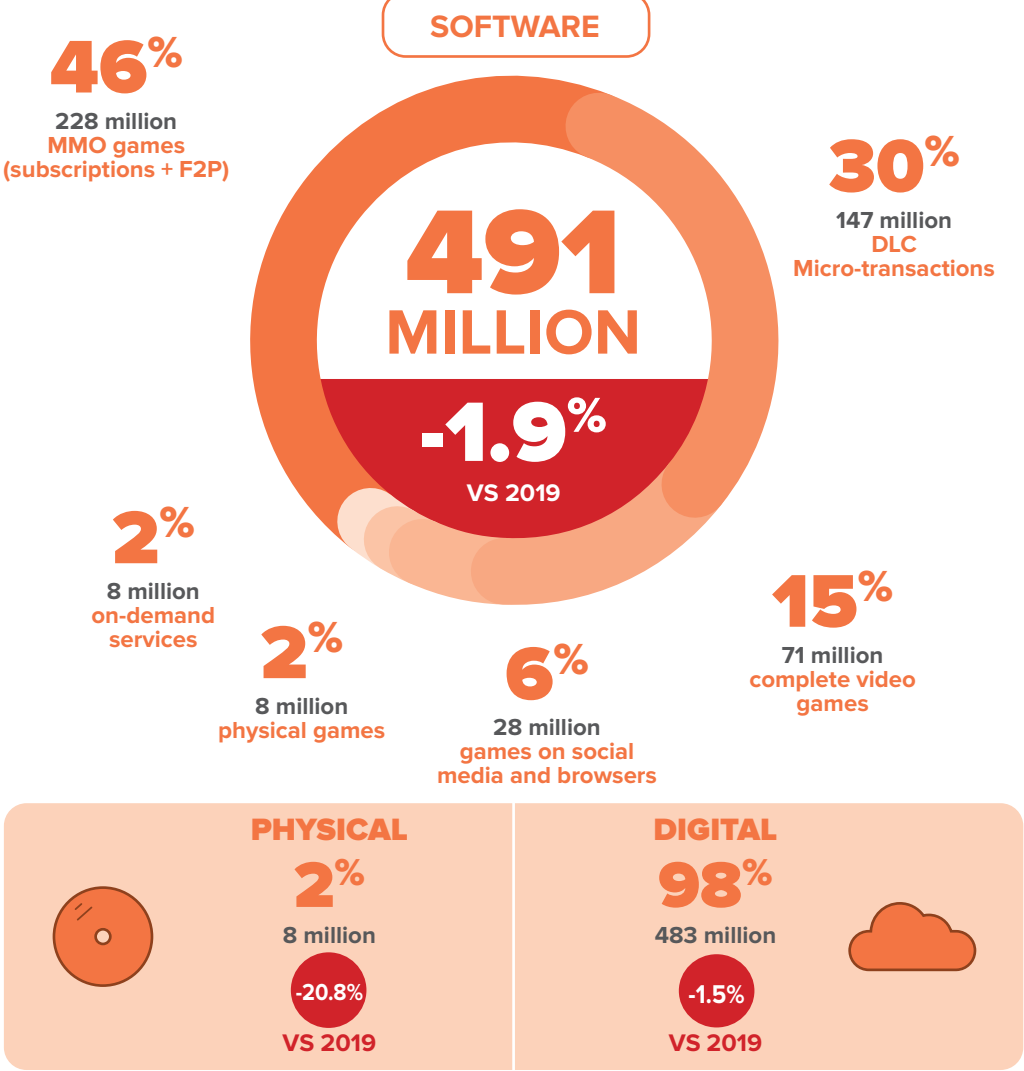
# PC ECOSYSTEM

BREAKDOWN OF 2020 SALES IN EUROS



# PC ECOSYSTEM

GROWTH AND BREAKDOWN OF 2020 SALES IN EUROS



Sources: SELL data, from GSD/GameTrack panels at end 2020. Excluding bundles.  
Hardware: sales of PCs fitted with a high-performance graphics card.  
Accessories: mice, keyboards, screens for PC gameplay.  
\*Estimations

Sources: SELL data, from GSD/GameTrack panels at end 2020. Excluding bundles.

# PC ECOSYSTEM

BREAKDOWN OF 2020 SALES IN EUROS

## HARDWARE\*

**516** MILLION  
EUROS\*\*

**+20%**  
VS 2019



## ACCESSORIES

**175** MILLION  
EUROS\*\*

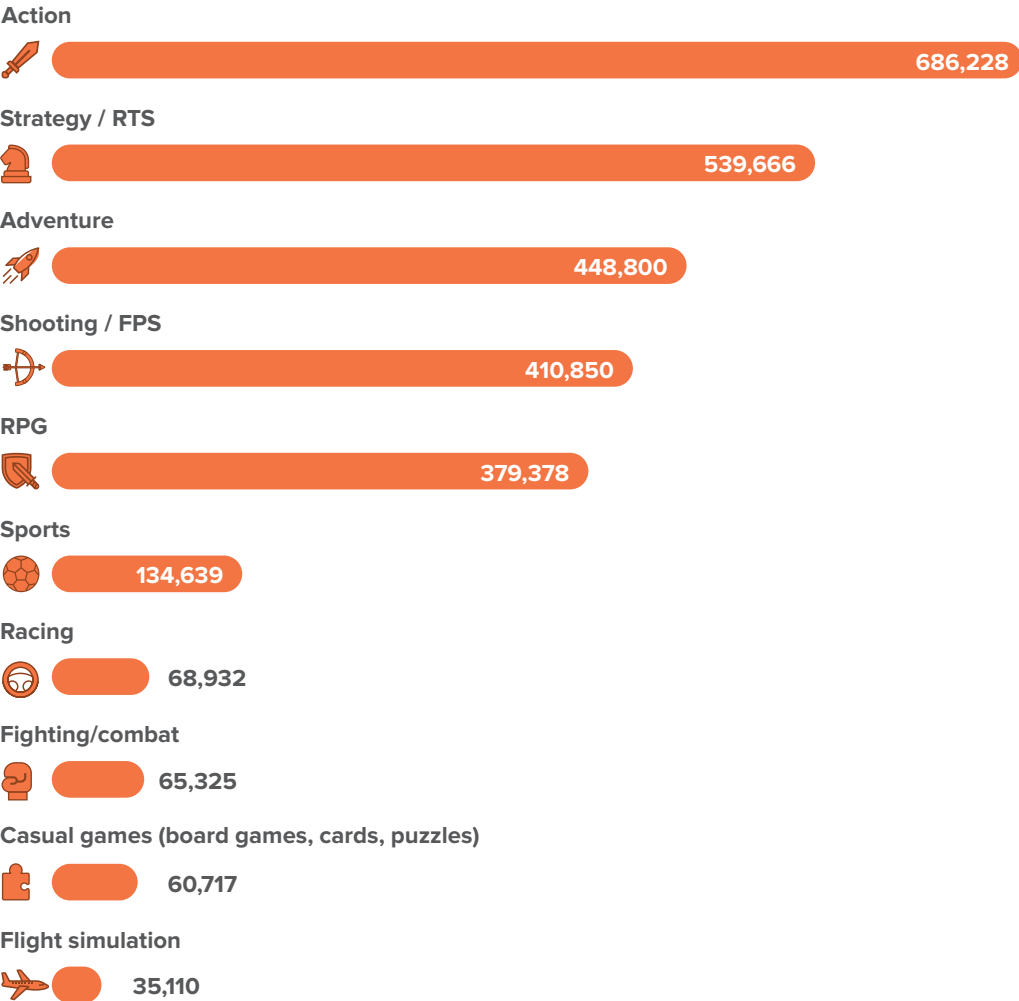
**+13%**  
VS 2019



Sources: SELL data, from GSD/GameTrack panels at end 2020. Excluding bundles.  
\*Hardware: sales of PCs fitted with a high-performance graphics card.  
Accessories: mice, keyboards, screens for PC gameplay.  
\*\*Estimations

# TOP 10 TYPES OF VIDEO GAMES BOUGHT IN 2020

PHYSICAL + DIGITAL MARKET IN VOLUME



Sources: SELL data, from GSD/GameTrack panels at end 2020. Excluding bundles.

# TOP 20 GAMES IN 2020

## PC ECOSYSTEM

PHYSICAL + DIGITAL MARKET IN VALUE

1



**FOOTBALL  
MANAGER 2020**  
Sega  
1,932,067 €

2



**RED DEAD  
REDEMPTION 2**  
Take-Two Interactive  
1,675,126 €

3



**CYBERPUNK 2077**  
CD Projekt Red  
1,485,704 €

4	Borderlands 3	TAKE-TWO INTERACTIVE	1,453,049 €
5	Football Manager 2021	SEGA	1,383,836 €
6	Crusader Kings III	PARADOX INTERACTIVE	1,367,219 €
7	Grand Theft Auto V	TAKE-TWO INTERACTIVE	1,112,288 €
8	Microsoft Flight Simulator	MICROSOFT	1,107,180 €
9	Assassin's Creed Odyssey	UBISOFT	833,025 €
10	Farming Simulator 19	FOCUS HOME INTERACTIVE	796,178 €
11	Tom Clancy's Rainbow Six Siege	UBISOFT	726 € 078
12	Metro Exodus	DEEP SILVER	672,852 €
13	Total War: Warhammer II	SEGA	657,787 €
14	Dragon Ball Z: Kakarot	BANDAI NAMCO ENTERTAINMENT	595,395 €
15	Monster Hunter: World	CAPCOM	530,309 €
16	Sid Meier's Civilization VI	TAKE-TWO INTERACTIVE	510,439 €
17	The Sims 4	ELECTRONIC ARTS	470,339 €
18	Marvel's Avengers	SQUARE ENIX	452,543 €
19	Resident Evil 3	CAPCOM	447,360 €
20	Sekiro: Shadows Die Twice	ACTIVISION BLIZZARD	416,464 €

# TOP 20 GAMES IN 2020

## PC ECOSYSTEM


PHYSICAL + DIGITAL MARKET IN VOLUME

1



**TOM CLANCY'S  
RAINBOW SIX  
SIEGE**  
Ubisoft  
56,817

2



**GRAND  
THEFT AUTO V**  
Take-Two Interactive  
56,809

3



**RED DEAD  
REDEMPTION 2**  
Take-Two Interactive  
44,086

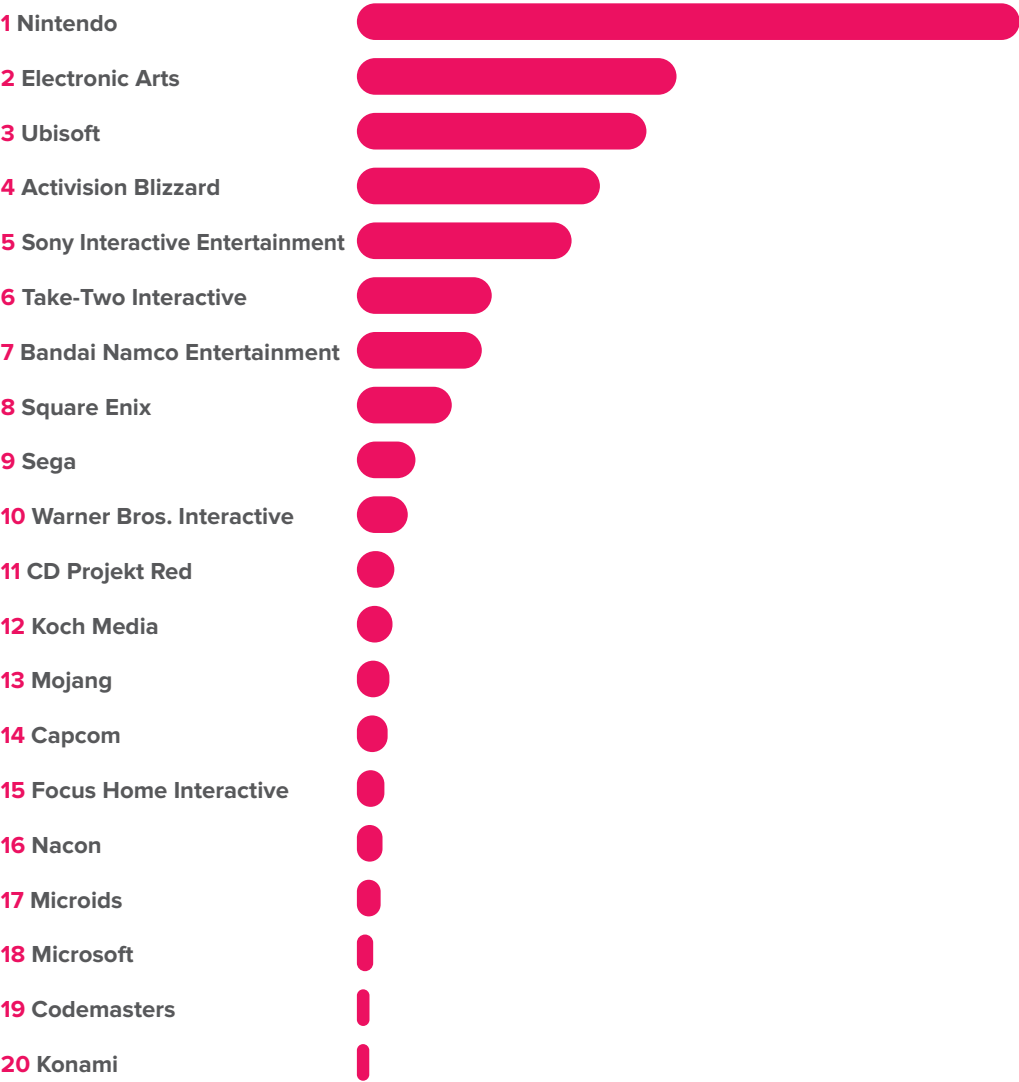
4	Football Manager 2020	SEGA	39,307
5	Borderlands 3	TAKE-TWO INTERACTIVE	38,344
6	Farming Simulator 19	FOCUS HOME INTERACTIVE	34,439
7	Assassin's Creed Odyssey	UBISOFT	30,113
8	Football Manager 2021	SEGA	27,893
9	Sid Meier's Civilization VI	TAKE-TWO INTERACTIVE	27,475
10	Metro Exodus	DEEP SILVER	26,356
11	Monster Hunter: World	CAPCOM	24,876
12	Total War: Warhammer II	SEGA	24,093
13	Crusader Kings III	PARADOX INTERACTIVE	23,753
14	Far Cry 5	UBISOFT	20,270
15	Cyberpunk 2077	BANDAI NAMCO ENTERTAINMENT	19,886
16	A Plague Tale: Innocence	FOCUS HOME INTERACTIVE	19,669
17	The Sims 4	ELECTRONIC ARTS	18,981
18	Rise of the Tomb Raider	SQUARE ENIX	18,916
19	Xcom: Chimera Squad	TAKE-TWO INTERACTIVE	18,875
20	Assassin's Creed Origins	UBISOFT	18,035

Sources: SELL data, from GSD/GameTrack panels at end 2020. Excluding bundles.

Sources: SELL data, from GSD/GameTrack panels at end 2020. Excluding bundles.

# TOP 20 PUBLISHERS SOFTWARE

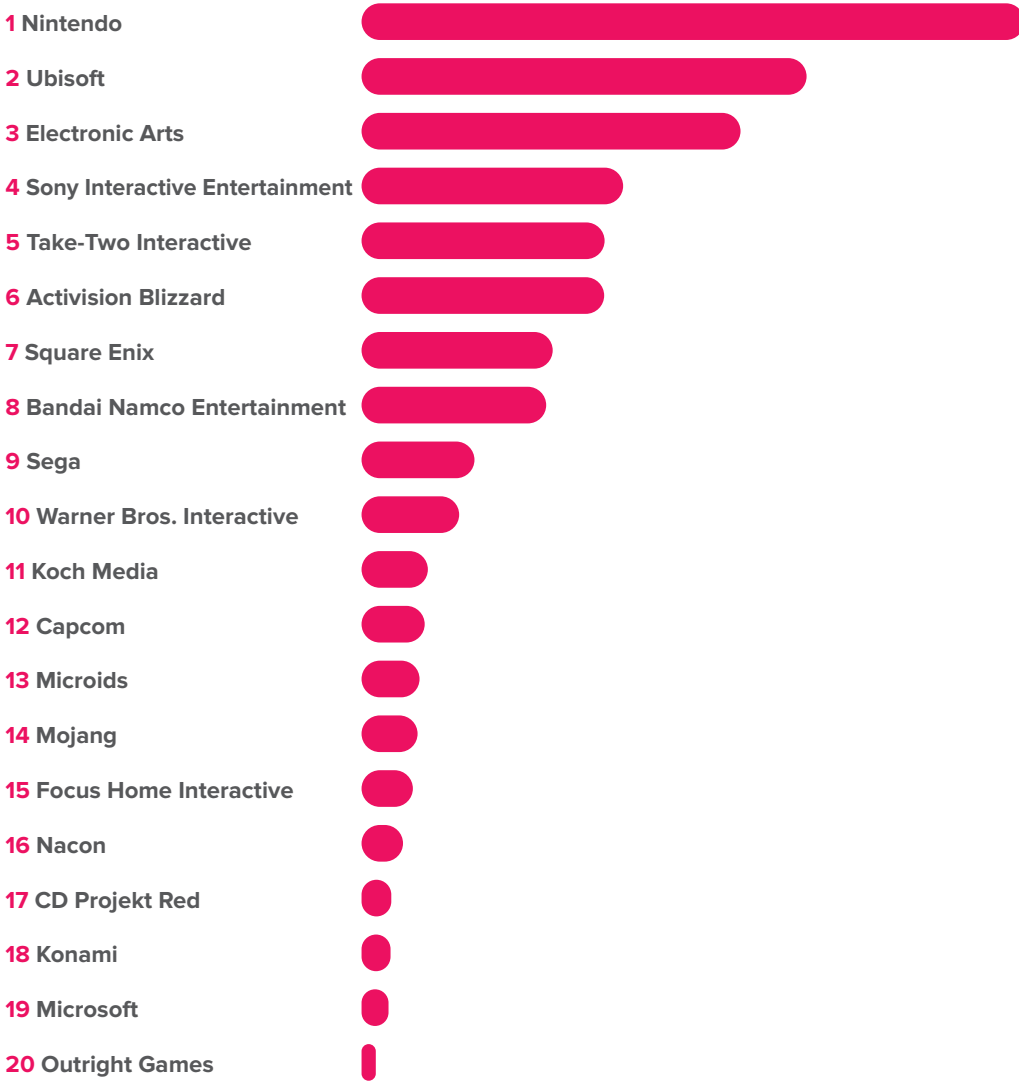
PHYSICAL + DIGITAL MARKET IN VALUE



Sources: SELL data, from GSD/GameTrack panels at end 2020. Excluding bundles.  
This listing does not include Nintendo digital sales data.

# TOP 20 PUBLISHERS SOFTWARE

PHYSICAL + DIGITAL MARKET IN VOLUME



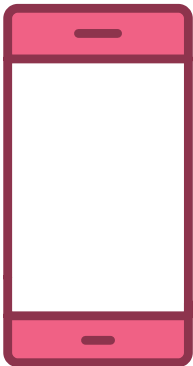
Sources: SELL data, from GSD/GameTrack panels at end 2020. Excluding bundles.  
This listing does not include Nintendo digital sales data.



# MOBILE ECOSYSTEM

GROWTH IN SALES FOR 2020

SOFTWARE



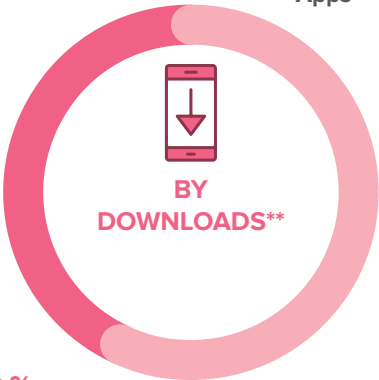
1,426  
MILLION  
EUROS

+16%\*  
VS 2019

APP MARKET IN FRANCE IN 2020  
IOS AND GOOGLE PLAY COMBINED

57%  
Apps

33%  
Apps



43%  
Games



67%  
Games

\*Source: GameTrack estimations using user spending data from App Annie 2020, converted into euros and including French taxes.  
\*\*App Annie Intelligence at end 2020

# TOP 10 GAMES IN 2020 MOBILE ECOSYSTEM

DOWNLOADS

FREE APPS

PAYABLE APPS

1 Brain Out

Eyewind



2 Coin Master

Moon Active



3 Gardenscapes  
New Acres

Playrix



4 Among Us!

InnerSloth



5 Brawl Stars

Supercell



6 Brain Test:  
Tricky Puzzles

Unico Studio



7 Magic Tiles 3

Amanotes



8 Homescapes

Playrix



9 Scrabble Go

Scopely



10 Fishdom:  
Deep Dive

Playrix



1 Minecraft  
Pocket Edition

Microsoft



2 Monopoly  
by Marmalade

Marmalade



3 Plague Inc

Ndemic  
Creations



4 Football Manager  
2020 Mobile

SEGA SAMMY



5 Grand Theft Auto:  
San Andreas

Take-Two  
Interactive



6 Farming  
Simulator 20

Giants Software



7 Geometry Dash

RobTop



8 Clue: The Classic  
Mystery Game

Marmalade



9 True Skate

True Axis



10 Mini Metro

Playdigious













Source: App Annie Intelligence end 2019. iOS and Google Play Data combined.



# TOP 10 GAMES IN 2020

## MOBILE ECOSYSTEM











CONSUMER SPENDING

1	Coin Master	Moon Active	
2	Clash of Clans	Supercell	
3	Brawl Stars	Supercell	
4	Dragon Ball Z Dokkan Battle	Bandai Namco Entertainment	
5	Gardenscapes - New Acres	Playrix	
6	Summoners War	GAMEVIL	
7	Candy Crush Saga	Activision Blizzard	
8	The Seven Deadly Sins: Hikari to Yami no Grand Cross	Netmarble	
9	Homescapes	Playrix	
10	State of Survival	FunPlus	

# TOP 10 PUBLISHERS

## OF VIDEO GAME APPS IN 2020

BY DOWNLOADS AND CONSUMER SPENDING

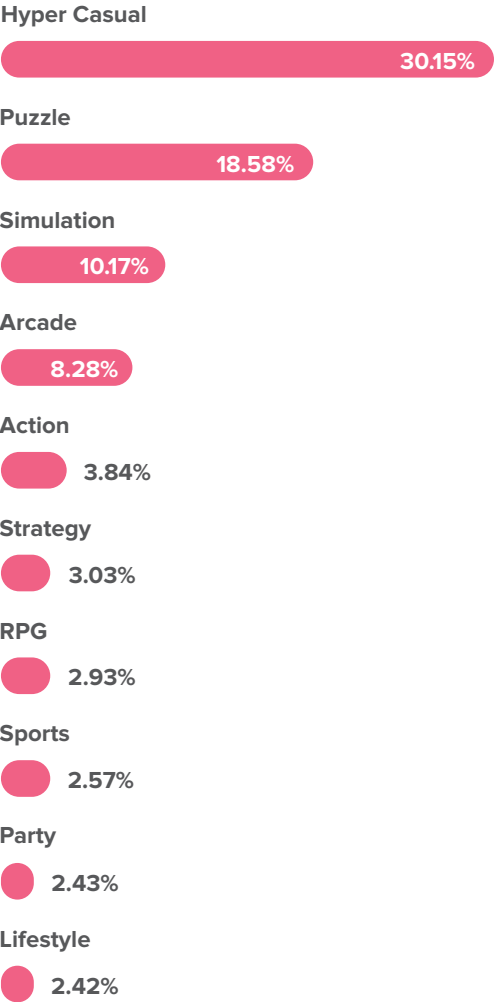
BY DOWNLOADS	BY CONSUMER SPENDING
1 <b>Voodoo</b> France	1 <b>SUPERC ELL</b> Finland
2  <b>APPLOVIN</b> United States	2 <b>ACTIVISION</b>   <b>BLIZZARD</b> United States
3  <b>Crazy Labs</b> Israel	3 <b>playrix</b> Ireland
4  <b>saygames</b> Belarus	4 <b>MOONACTIVE</b> Israel
5 <b>playrix</b> Ireland	5  <b>BANDAI NAMCO</b> Japan
6  <b>UBISOFT</b> France	6  <b>FUNPLUS</b> China
7  <b>goodjob games</b> Turkey	7  <b>netmarble</b> South Korea
8  <b>amanotes</b> Vietnam	8  <b>zynga</b> United States
9 <b>PLAYGENDARY</b> Germany	9  <b>lilith GAMES</b> China
10 <b>AZUR GAMES</b> Russia	10 <b>ARISTOCRAT</b> Australia

# TOP 10 GAMES IN 2020

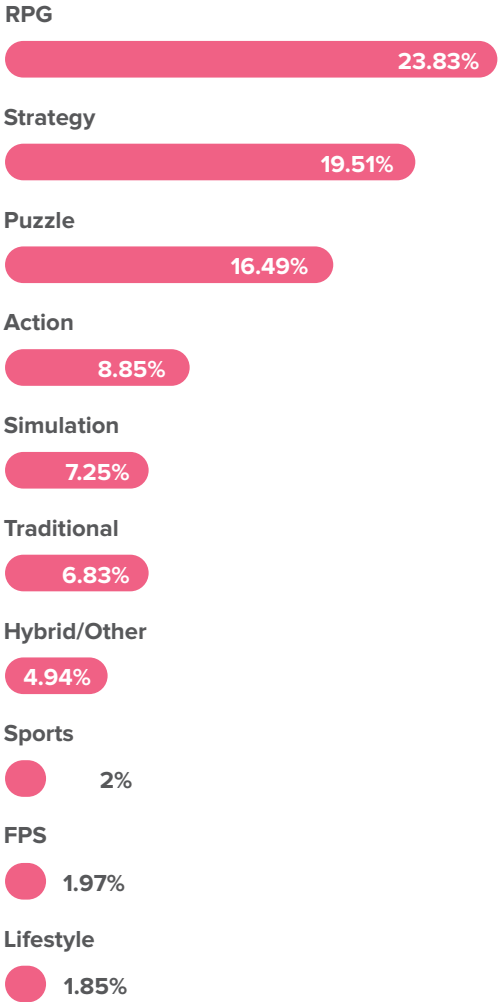
## BY GAME TYPE

BY DOWNLOADS AND CONSUMER SPENDING

BY DOWNLOADS



BY CONSUMER SPENDING



## CHAPTER 2

# THE PROFILE OF FRENCH VIDEO GAME PLAYERS



Mediametrie

### ABOUT THE SELL "FRENCH PEOPLE AND VIDEO GAMING" SURVEY

Data collected and analysed by Médiamétrie for SELL with the aim of measuring and understanding the uses and profiles of video game players in France.

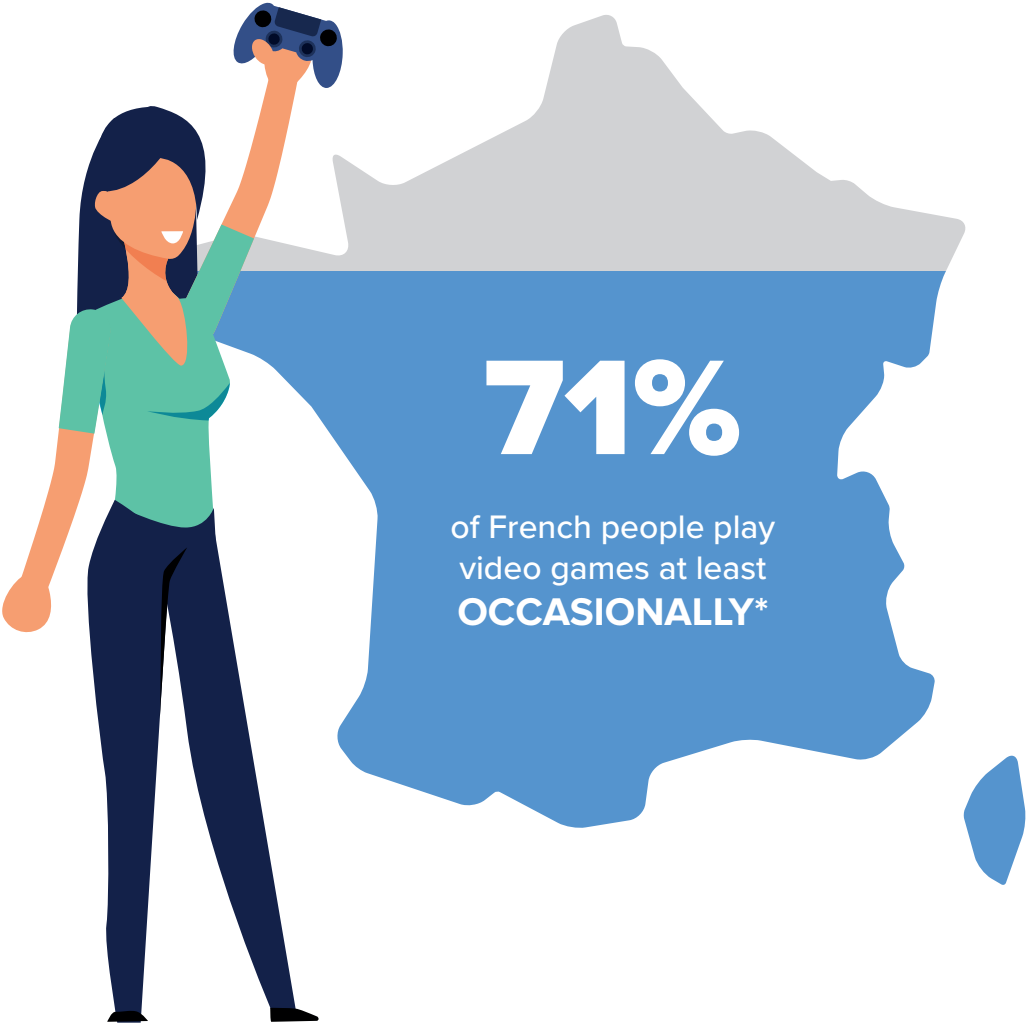
Survey carried out online from 1<sup>st</sup> to 24<sup>th</sup> September 2020 with a sample of 4,072 people aged 10 and over, representing web users living in France.

All rights reserved © 2020 Médiamétrie - [www.mediametrie.fr](http://www.mediametrie.fr)

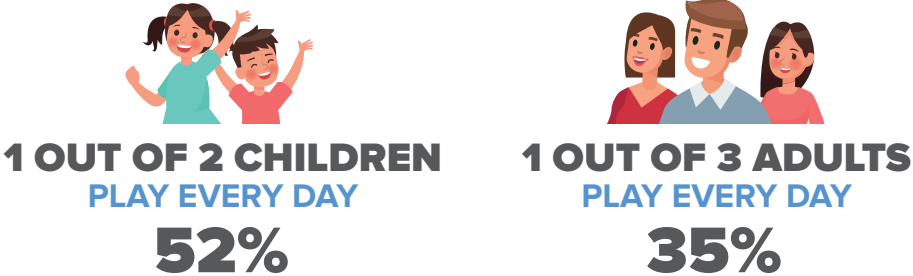
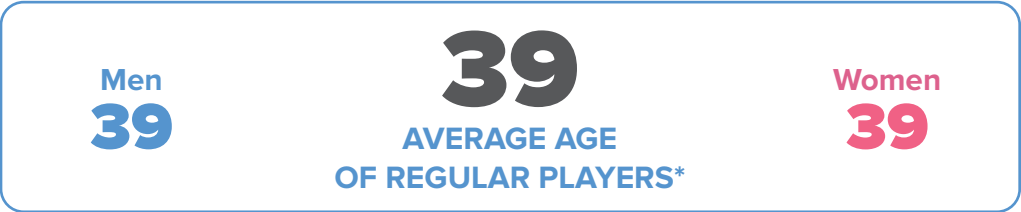
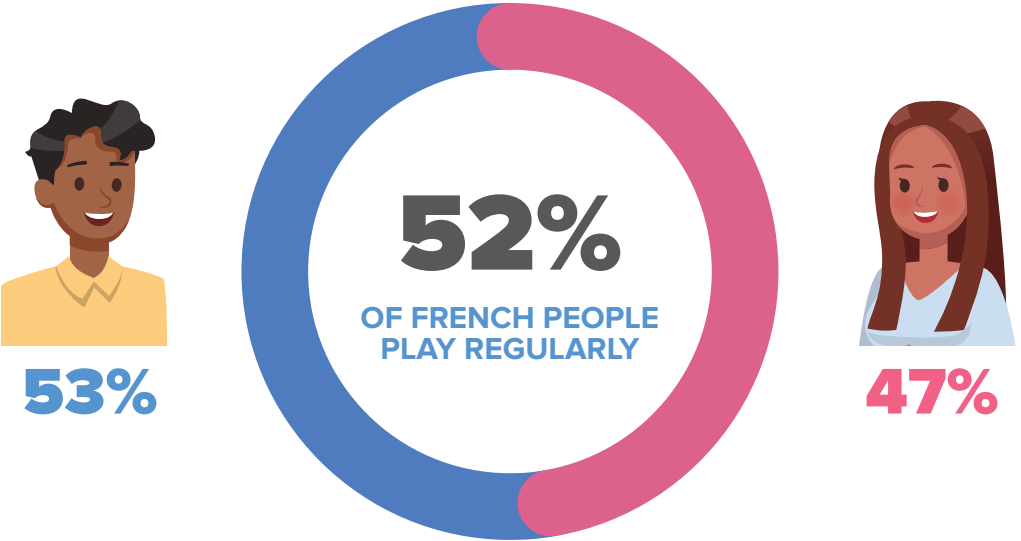


# VIDEO GAMING IN FRANCE

36.46 MILLION PLAYERS

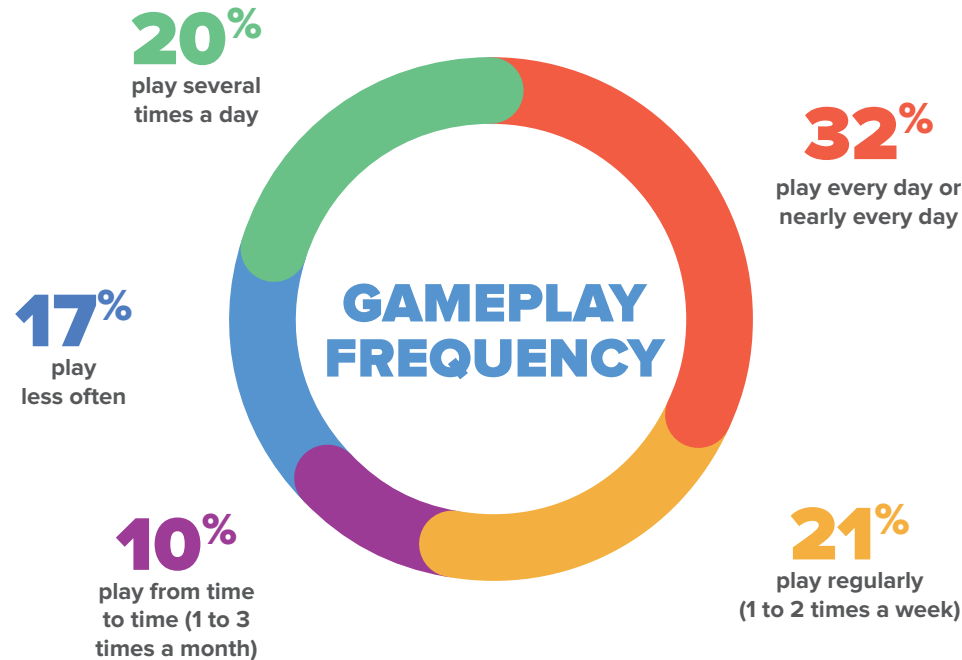
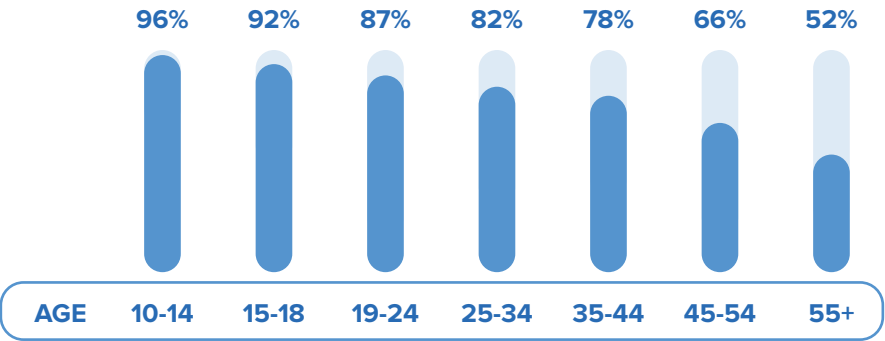


# PROFILE OF A REGULAR FRENCH VIDEO GAME PLAYER



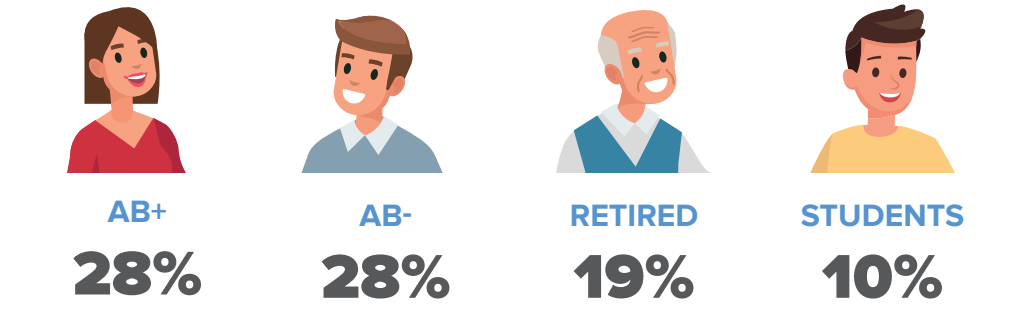
# FRENCH VIDEO GAME PLAYERS

PERCENTAGE OF PLAYERS BY AGE GROUP

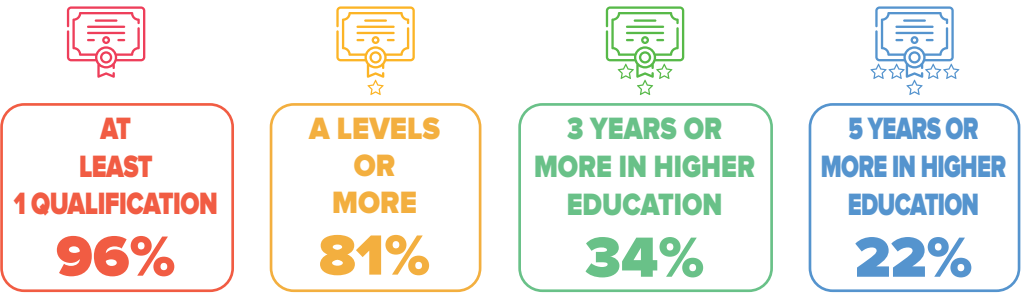


# FRENCH VIDEO GAME PLAYERS

BREAKDOWN OF PLAYERS BY SOCIAL CATEGORY



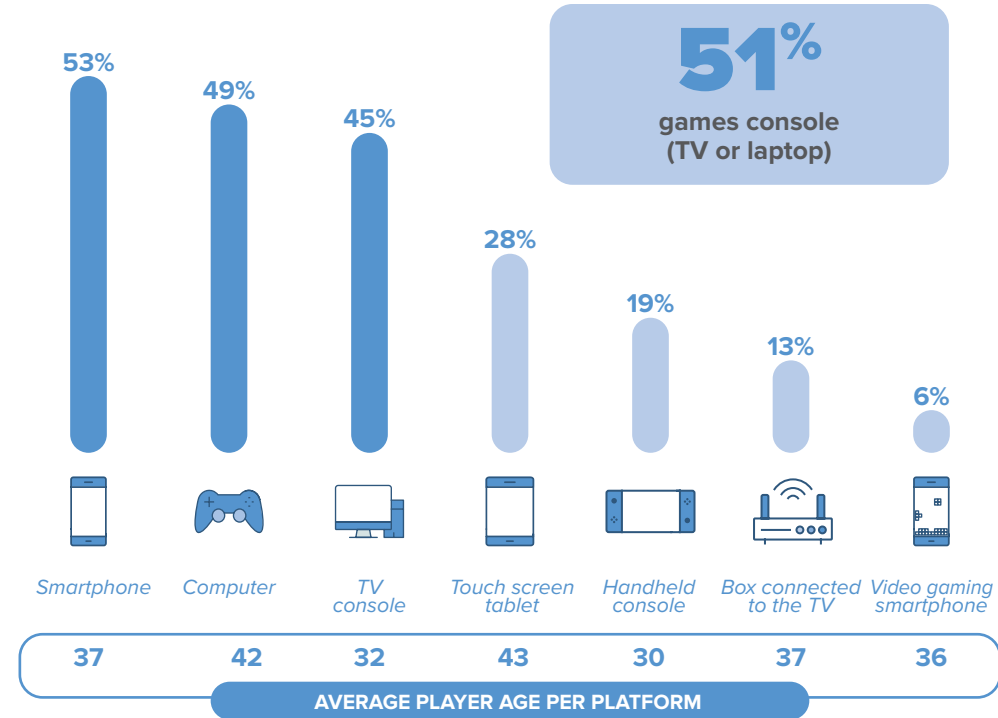
BREAKDOWN OF PLAYERS BY EDUCATION



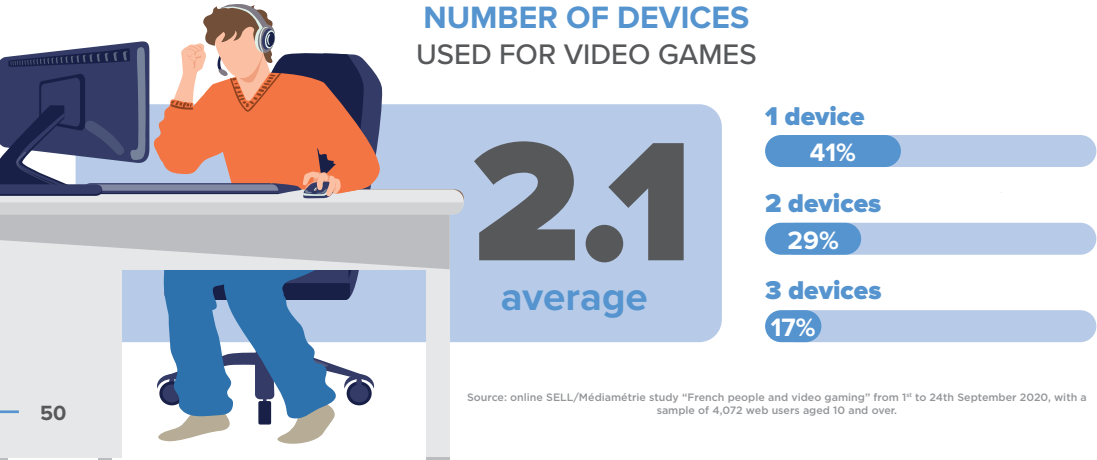
BREAKDOWN OF PLAYERS BY REGION



# DEVICES USED TO PLAY VIDEO GAMES



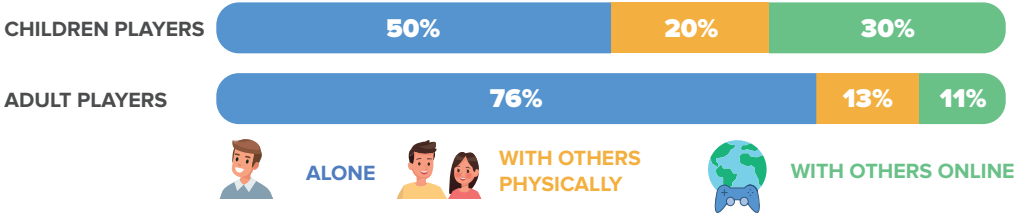
## NUMBER OF DEVICES USED FOR VIDEO GAMES



Source: online SELL/Médiamétrie study "French people and video gaming" from 1<sup>st</sup> to 24<sup>th</sup> September 2020, with a sample of 4,072 web users aged 10 and over.

# SOCIAL ASPECT OF VIDEO GAMING

ALONE OR WITH OTHERS



## MORE THAN A THIRD OF VIDEO GAME PLAYERS PLAY ONLINE WITH OTHER PEOPLE

**63%** of players do not play online games



**37%** of players play online games

**1 OUT OF 5 PLAYERS**

**FEELING OF BELONGING TO A COMMUNITY**

**NEARLY 1 OUT OF 2 CHILDREN**

CHAPTER 3

# TYPOLOGY OF VIDEO GAME PLAYERS



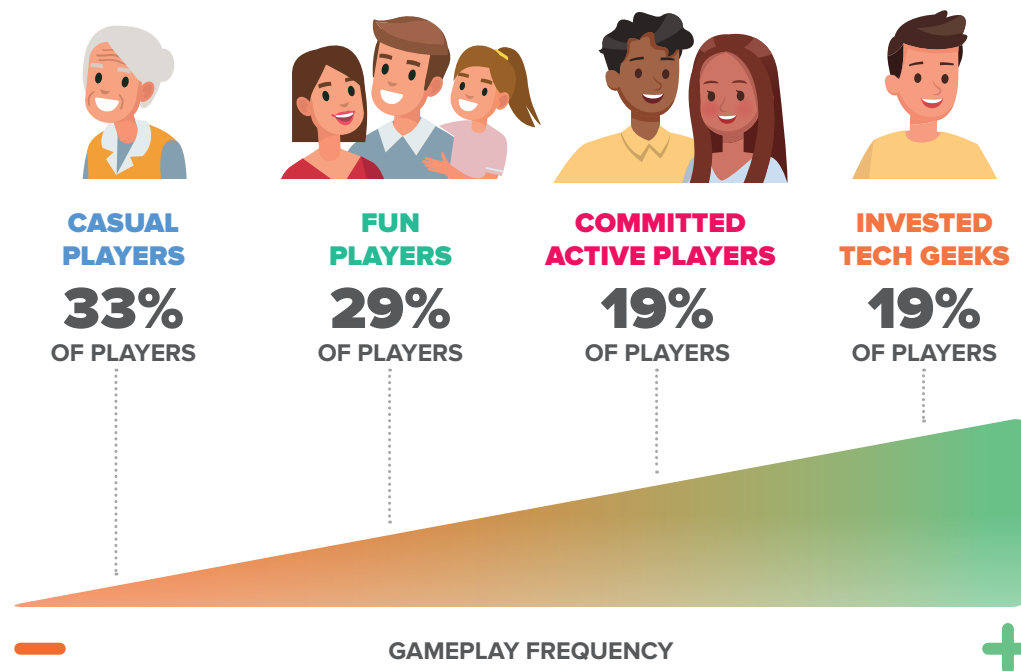
## PRINCIPLES OF THE TYPOLOGY

- Identify criteria that will help create the groups.
- Calculate the similarities between individuals given the chosen variables.
- Create classes by allocating each individual to their nearest group.
- Each individual is allocated to one group only

## OBJECTIVES OF THE TYPOLOGY

- Create groups of individuals according to their similarities using a set of criteria
- Create groups of individuals who are as similar as possible so that these groups are as different as possible

## GROUP HIERARCHY DEPENDING ON THEIR GAMEPLAY FREQUENCY



# CASUAL VIDEO GAME PLAYERS

# FUN VIDEO GAME PLAYERS



**58%** Women  
**58%** 50 and over  
**38%** Retired

**50%**  
**32%**  
**19%**

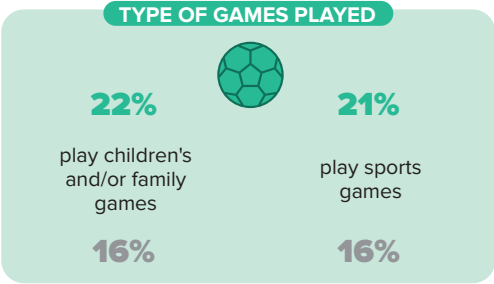
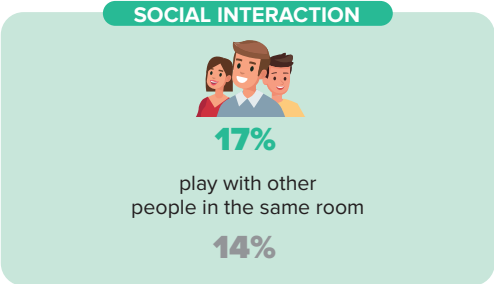
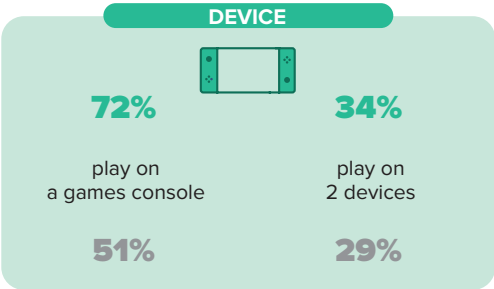
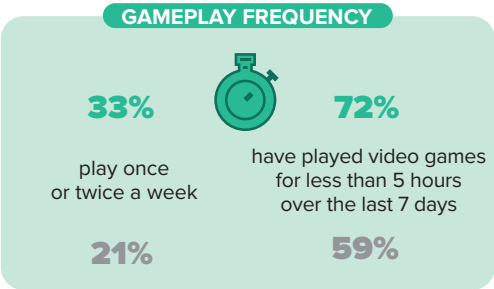
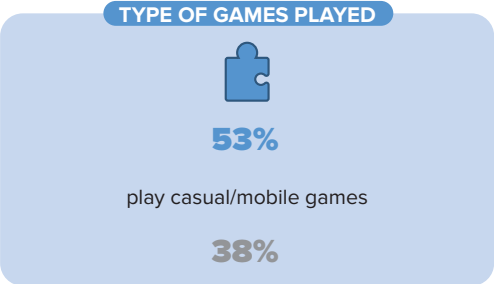
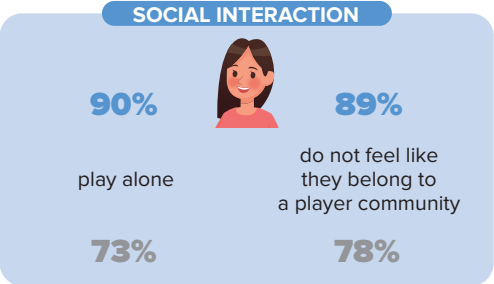
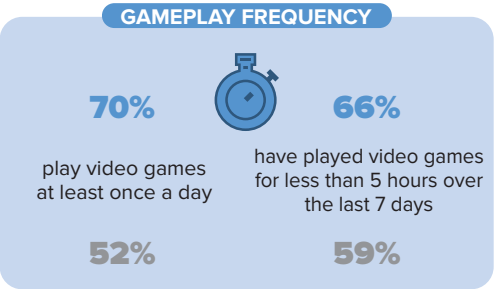
**33%**  
OF PLAYERS



**18%** 10-14  
**29%** 35-49  
**31%** living in a household  
of at least 4 people

**10%**  
**24%**  
**23%**

**29%**  
OF PLAYERS



CASUAL PLAYERS

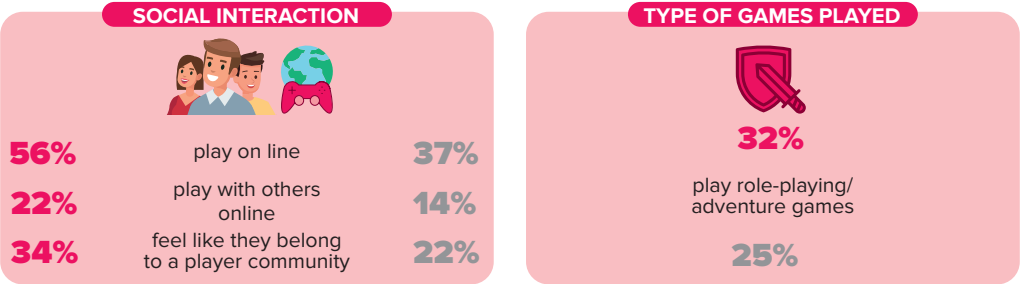
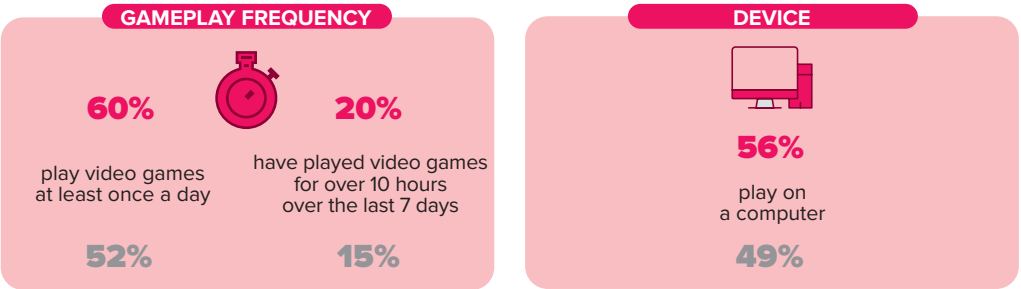
ALL VIDEO GAME PLAYERS

FUN PLAYERS

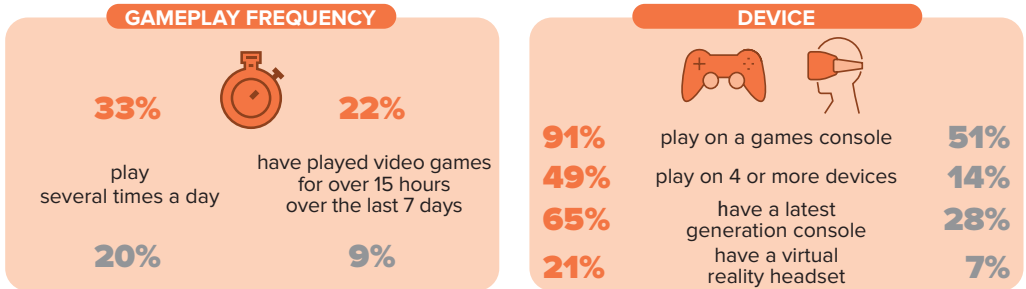
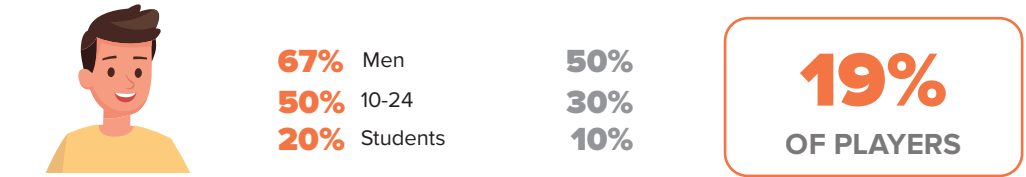
ALL VIDEO GAME PLAYERS



# COMMITTED ACTIVE VIDEO GAME PLAYERS



# INVESTED TECH GEEKS



COMMITTED ACTIVE PLAYERS ALL VIDEO GAME PLAYERS

INVESTED TECH GEEKS ALL VIDEO GAME PLAYERS

CHAPTER 4

# A RESPONSIBLE INDUSTRY








## TO HELP PARENTAL CONTROL

**TO HELP FAMILIES ESTABLISH RULES FOR PLAYING VIDEO GAMES, ALL VIDEO GAME 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 devices 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 video games 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 video games, 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, 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 THAT CAN BE CONFIGURED TO THE PEGI SYSTEM.

				
<b>HOME CONSOLES</b> 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	<b>HANDHELD CONSOLES</b> Nintendo DS Nintendo 3DS Sony PSP Sony PlayStation Vita	<b>MOBILES</b> Smart phones using Android Tablets using Android	<b>COMPUTERS</b> Windows operating system Windows operating MacOS	<b>WEB BROWSERS</b> 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 ENLIGHTENED 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 interactive 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.

CREATED  
IN  
2003

PRESENT  
IN  
38 COUNTRIES

NEARLY  
30,000  
APPROVED GAMES

FEDERATING  
1,800  
MEMBER COMPANIES

3  
www.pegi.info

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

7  
www.pegi.info

Unrealistic.  
Implicit violence, cartoon, 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.


### THE LABELS


								
3 www.pegi.info								
7 www.pegi.info	✓		✓					
12 www.pegi.info	✓	✓	✓	✓	✓	✓		
16 www.pegi.info	✓	✓	✓	✓	✓	✓		
18 www.pegi.info	✓	✓		✓	✓	✓	✓	


  
This game contains bad language.


  
This game contains images which may encourage discrimination.


  
This game encourages and/or teaches gambling.

  
This game refers to the use of drugs (including tobacco and alcohol).

  
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.

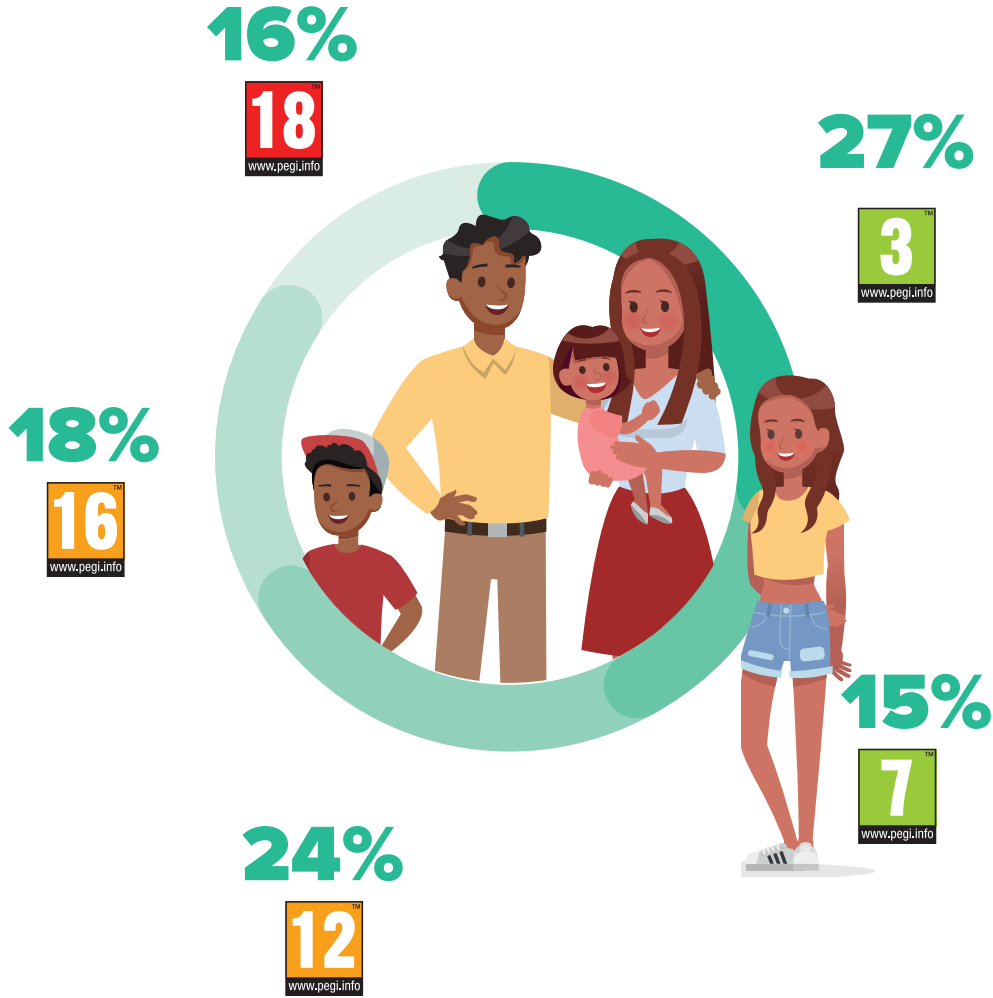
  
This game may frighten young children.

60

61

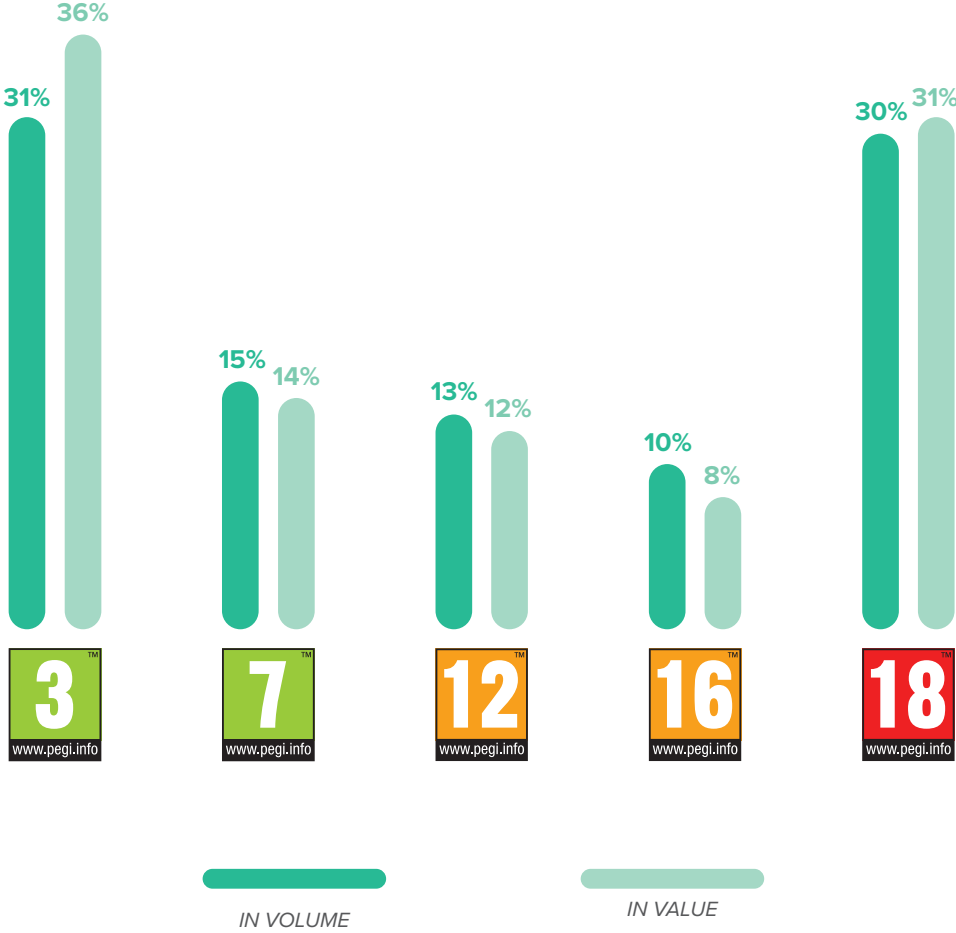
# PEGI ANALYSIS OF THE 2020 OFFER

PHYSICAL + DIGITAL MARKET



# PEGI SALES ANALYSIS, MARKET SHARE IN 2020

PHYSICAL + DIGITAL MARKET

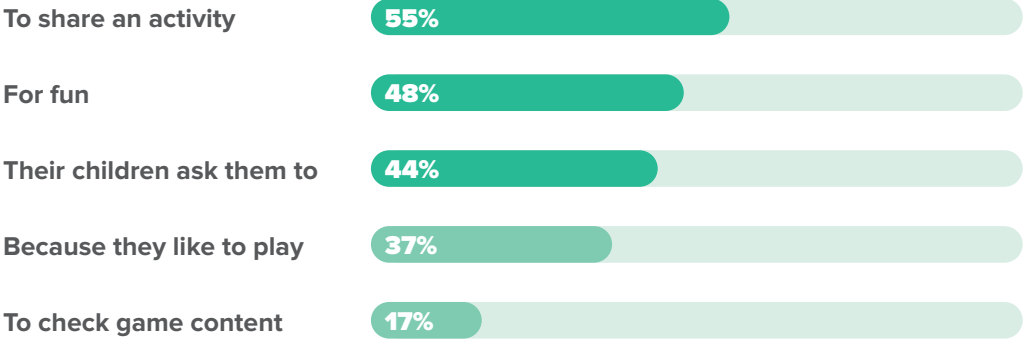


# PARENT BEHAVIOUR TOWARDS VIDEO GAMES

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

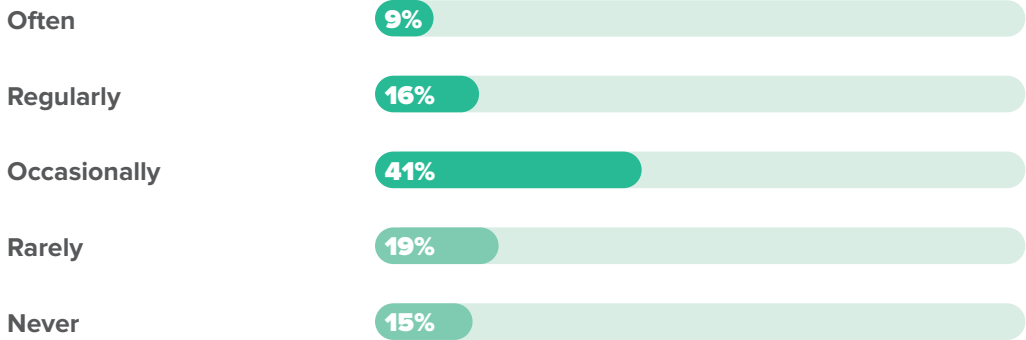


## WHY DO PARENTS PLAY VIDEO GAMES WITH THEIR CHILDREN?



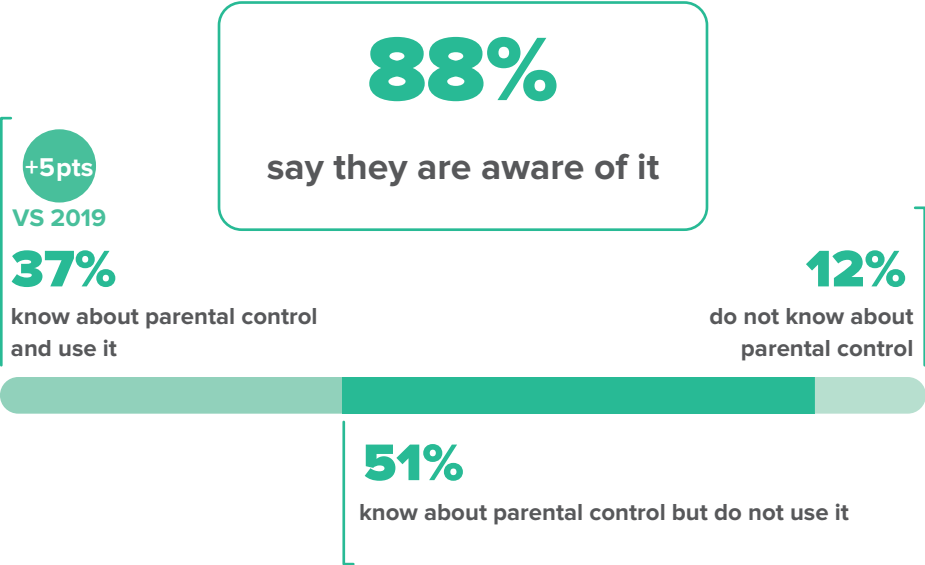
**66%** of parents say they play with their children at least occasionally

## HOW OFTEN PARENTS PLAY VIDEO GAMES WITH THEIR CHILDREN

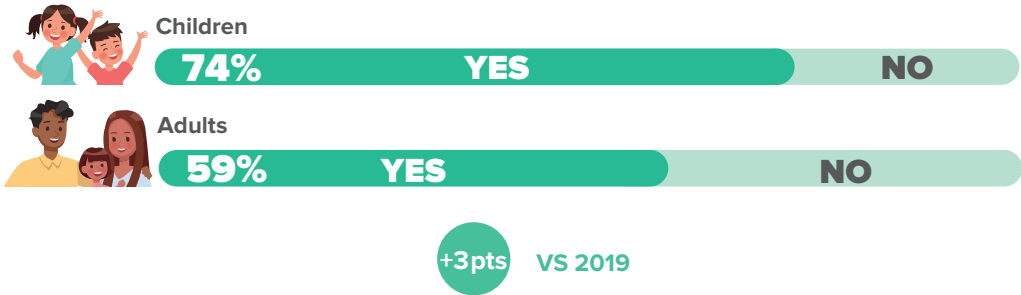


# PARENT BEHAVIOUR TOWARDS VIDEO GAMES

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



CHILDREN  
PAY ATTENTION TO THE PEGI SYSTEM



## CHAPTER 5

# 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 one 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-five 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 video game players and their friends and families, in 2003 SELL members implemented a simple, complete and independent video game rating system: PEGI (Pan European Game Information). SELL expressed the industry's desire to be responsible through the PEGI rating system and through an information resource for parents (PédaGoJeux). In 2015 this commitment to society became concrete with the PEGI system's approval from the French Home Secretary as the rating system for video games in France.

SELL's main objective is to promote video games and gameplay 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.



# THE MISSIONS OF SELL

## 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 its objectives, SELL has invested in several organisations and working groups:

- The inter-ministerial working group comprising the General Directorate for Enterprise (DGE), the CNC, Ubisoft, the National Video Game Union (SNJV) and SELL
- CSA: member of the Child Protection Commission
- CNC: member of the Commission for Diversity in the Cultural Sector
- ISFE: member of the Board of Directors



## INFORM AND PROTECT

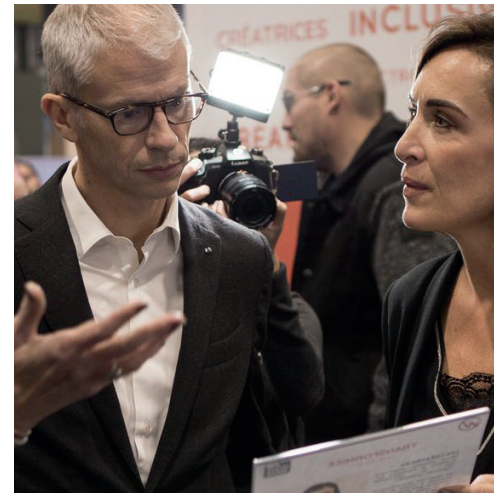
Since its beginnings, SELL has been committed to a corporate social responsibility initiative to inform and protect the consumer. The organisation operates in many areas to raise the awareness of video game players, parents and families about how to play video games. This investment is represented by concrete actions:

- PEGI – created in 2003 and approved in 2015 by the French government, this European video game system that rates the games according to content and age provides clear and precise information about video games.
- PédaGoJeux: a collective created in 2008 by bringing together people from public bodies, the video game industry and associations. Its aim is to guide parents and educators through the world of video.
- Support for organisations in the sector who are looking to develop the video game industry with a key focus on responsibility: Women in Games, CapGame, France eSports and also Silver Geek.

## PROMOTING THE VIDEO GAME MARKET

SELL's mission is to promote video gaming, the industry's innovations and creativity with the general public, national and European stakeholders and also the media. It achieves this through regular communication and most importantly via two essential annual events:

- IDEF: created in June 2006, this trade show brings together manufacturers, publishers, accessory manufacturers and buyers to generate business.
- Paris Games Week: created in October 2010, this general public exhibition promotes the entire video game ecosystem every year to share the sector's new products with video game players. The 2019 edition hosted some 317,000 visitors and 194 exhibitors.



## STRUCTURING MARKET INFORMATION

SELL works with partners to provide the whole ecosystem with reliable studies on the video game market, player profiles and also their habits when it comes to buying and use. Several panels are used to provide this analysis:

- GSD panel: Game Sales Data (distributors and digital) – ISFE/B2Boost
- GameTrack panel (consumers) – ISFE/IPSOS
- App Annie panel (mobile) – ISFE
- Occasional studies: French people and video gaming – SELL/Médiamétrie



# THE BOARD OF DIRECTORS

**Christophe Havart**  
*Bandai Namco Entertainment*

**Julie Chalmette**  
*Bethesda*

**Dominique Cor**  
*Electronic Arts*

**John Bert**  
*Focus Home Interactive*

**James Rebours**  
*Koch Media*

**Ina Gelbert**  
*Microsoft*

**Philippe Lavoué**  
*Nintendo*

**Guillaume de Fondaumière**  
*Quantic Dream*

**Philippe Cardon**  
*Sony Interactive Entertainment*

**Patrick Bellaiche and Michel Magne**  
*Take-Two Interactive*

**John Parkes**  
*Ubisoft*

**Yves Elalouf**  
*Warner Bros. Interactive Entertainment*

# THE MEMBERS OF SELL





**Julie Chalmette**  
Chairwoman

**Nicolas Vignolles**  
General Delegate  
n.vignolles@sell.fr

**Anne Sophie Montadier**  
Communication and  
Marketing Director  
as.montadier@sell.fr

**Meryl Pioche**  
Marketing Manager  
m.pioche@sell.fr

**Read all of SELL's news on social media**



@SELL\_JeuxVideo



@SELL\_JeuxVideo



@SELL\_JeuxVideo



SELL TV

**[www.sell.fr](http://www.sell.fr)**