

NOVEMBER 2020

# ESSENTIAL

## VIDEO GAME NEWS



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<b>CHAPTER 1</b>	PROFILES OF FRENCH VIDEO GAMERS	6
<b>CHAPTER 2</b>	TYPOLOGY OF VIDEO GAMERS	28
<b>CHAPTER 3</b>	THE FRENCH VIDEO GAME MARKET	36
<b>CHAPTER 4</b>	A RESPONSIBLE INDUSTRY	42
<b>CHAPTER 5</b>	SELL	48

# EDITORIAL

## A WORD FROM THE GENERAL DELEGATE

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**Thanks to gaming, French people were entertained, had fun and escaped at a time when very few other doors were open to the outside world.**

**Dear All,**

This edition of *Essential Video Game News* is an opportunity for me to first and foremost tell you how delighted I am to join SELL as General Delegate and to pass on the recognition of the entire team for the remarkable work accomplished by Emmanuel Martin over the last years. We shall pursue this work and progress.

Our organisation will more than ever continue to help improve knowledge of and recognition for video gaming. We shall continue to act for an increasingly responsible industry, committed to prevention and inclusion. We shall support and help structure the eSport industry in France. Finally, given the current health crisis and because video gaming is all about sharing, we are going to work on a 2021 edition of Paris Games Week that is even more federating and mainstream.

This issue of *Essential Video Game News* occurs during very strange times. We have been living through an exceptional situation for months that is affecting all of us, disrupting our routines and our certitudes, both private and professional. Our industry is caught up in this situation which is also changing the relationship French people have with video gaming. It is in these circumstances that we reveal this new issue of *Essential Video Game News* and our annual survey “French people and video gaming” by Médiamétrie.

Our ambition remains the same: shed light on the numbers and profiles of video game players in France and better understand their video game consumption and use. But because the situation in 2020 is so strange, we wanted to analyse the impact of the epidemic on video gaming and share certain lessons with you.

Thank goodness video gaming was there to give millions of French people a moment to share, have fun and escape in the midst of this stressful and isolating crisis.

A WORD FROM  
THE GENERAL  
DELEGATE



Video gaming is entertainment that brings people together. This experience has reminded people of that very clearly. Over half of gamers agree: video gaming helps create social connections.

Video gaming is also about pleasure. Thanks to gaming, French people were entertained, had fun and escaped at a time when very few other doors were open to the outside world.

Video gaming can rely on communities of gamers who are its primary ambassadors. It generates passion and engagement like no other hobby. It offers unrivalled variety in the experiences it provides. Experts or occasional gamers, they all were able to play and connect with the whole world during lockdown.

Undeniably, video gaming has enabled people to cope better with the crisis, playing an essential role in homes all over the world.

With the arrival of this new “French people and video gaming” survey, for the first time we are providing clear typology that will further extend our understanding of how video games are purchased and played in France. There are four major gamer profiles in the French population: “casual gamers”, “fun gamers”, “committed active gamers” and “invested tech geeks”.

The end of the year is looking particularly busy for the video game industry. The arrival of new consoles and the very full calendar for the festive season’s new releases prove once again our industry’s capacity for reinvention and technological excellence which continue to permanently push the boundaries of creativity.

With this new edition of *Essential Video Game News*, SELL is delighted to continue its historic mission to always help promote our sector. We will see you in February with our complete report of the 2020 video game market in France.

**Kind regards,  
Nicolas Vignolles**

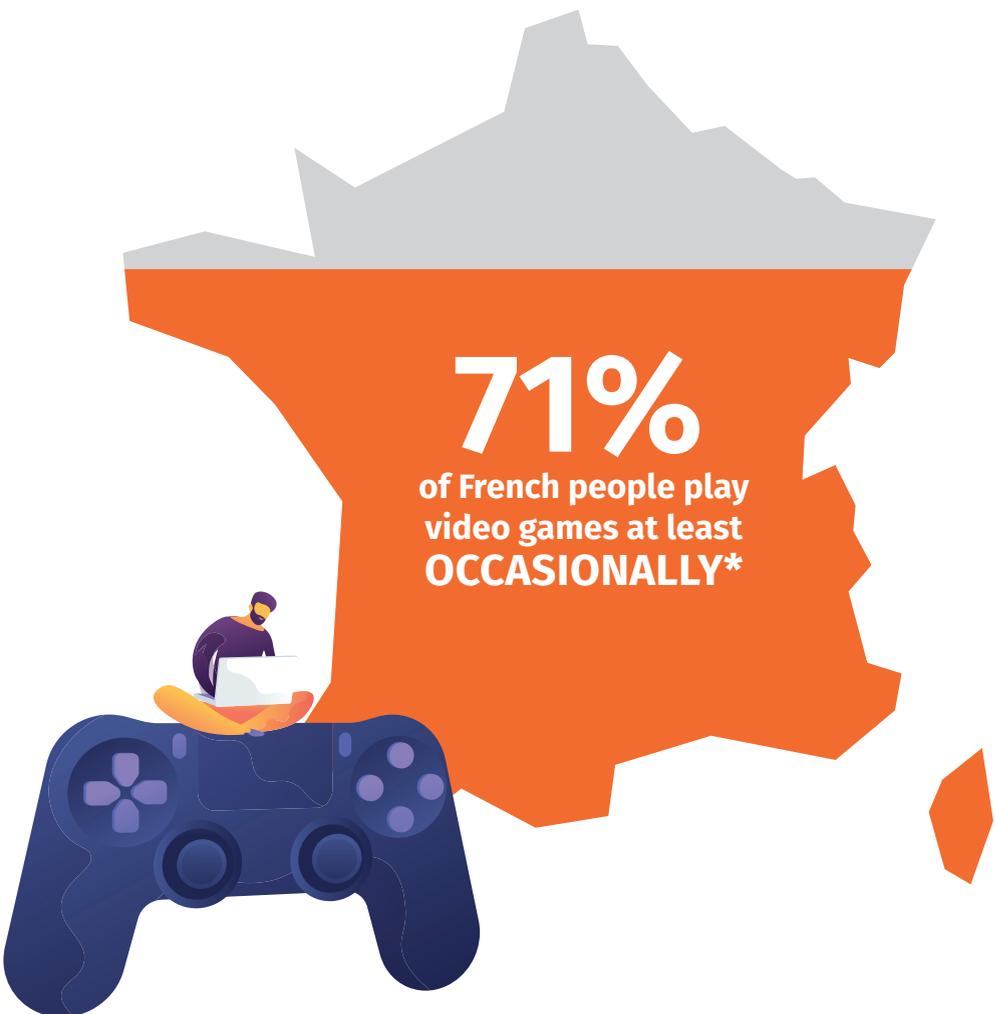


# CHAPTER 1 PROFILES OF FRENCH GAMERS



# VIDEO GAMING IN FRANCE

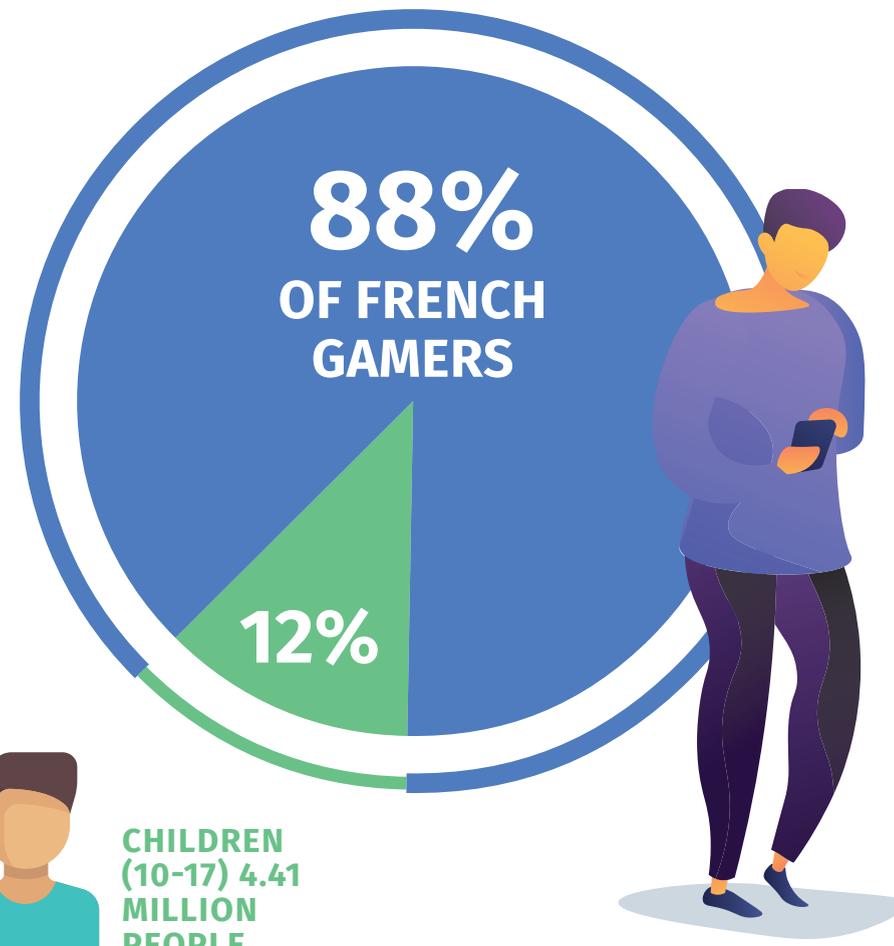
## 36.46 MILLION GAMERS



# VIDEO GAMING IN FRANCE



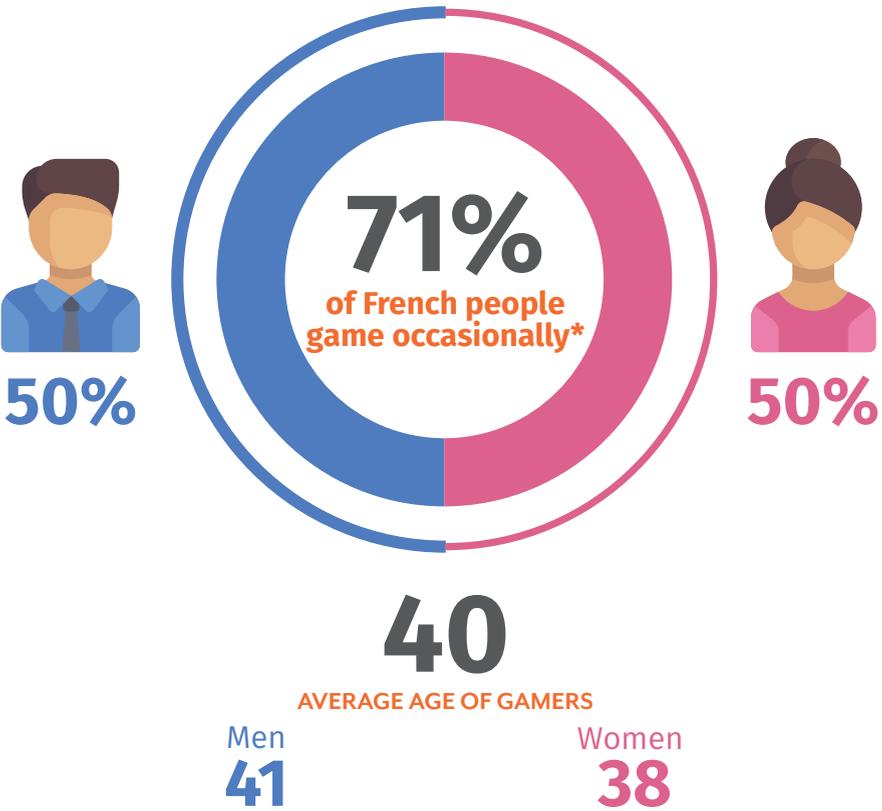
**ADULTS  
(18 AND OVER)  
32.05 MILLION  
PEOPLE**



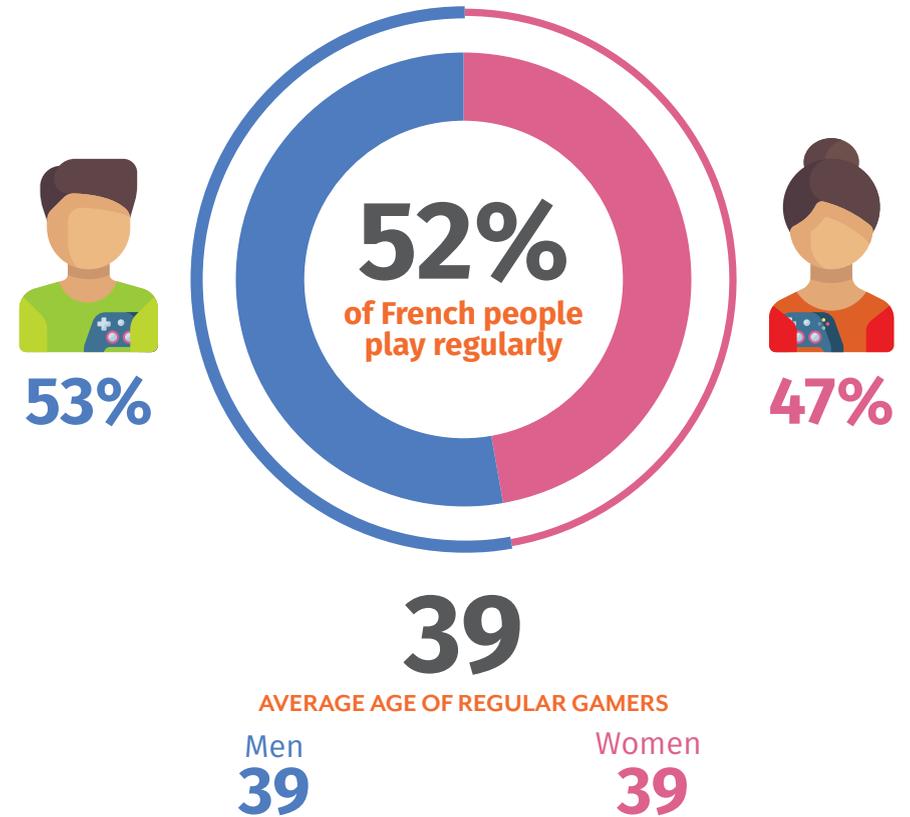
**CHILDREN  
(10-17) 4.41  
MILLION  
PEOPLE**



# PROFILES OF FRENCH GAMERS



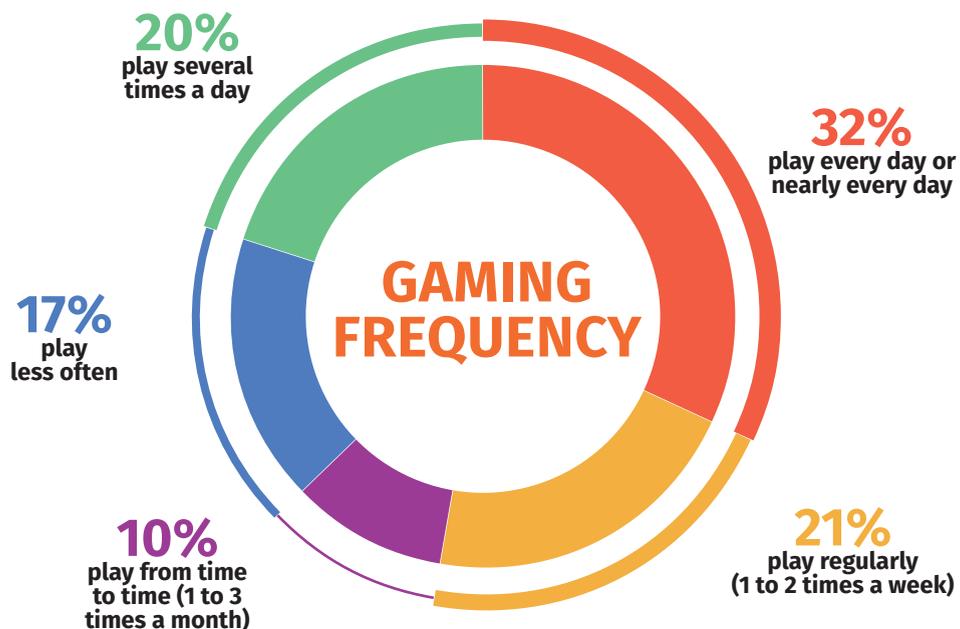
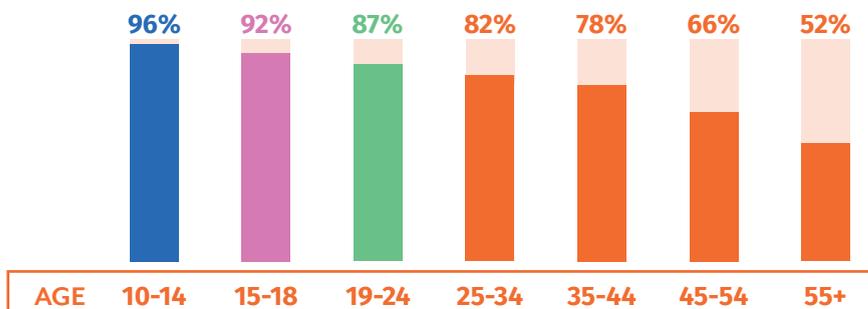
# PROFILE OF A REGULAR FRENCH GAMER\*





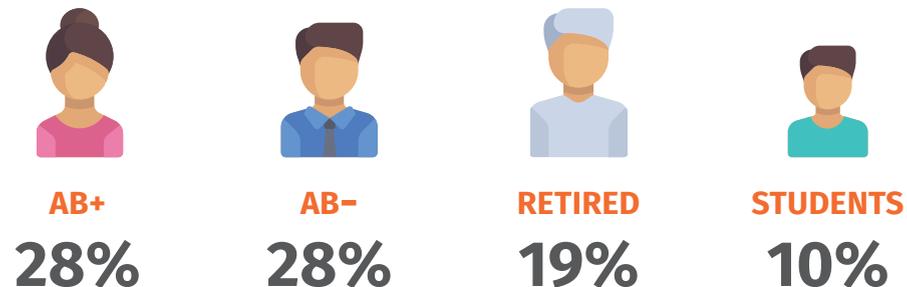
# FRENCH GAMERS

PERCENTAGE OF GAMERS  
BY AGE GROUP

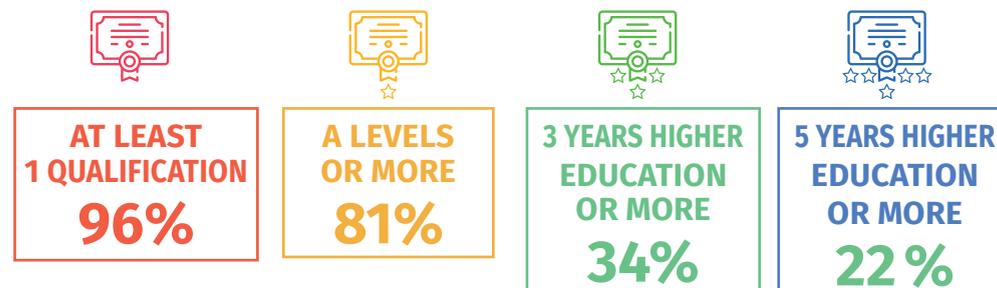


# FRENCH GAMERS

BREAKDOWN OF GAMERS  
BY SEC



BREAKDOWN OF GAMERS  
BY EDUCATION

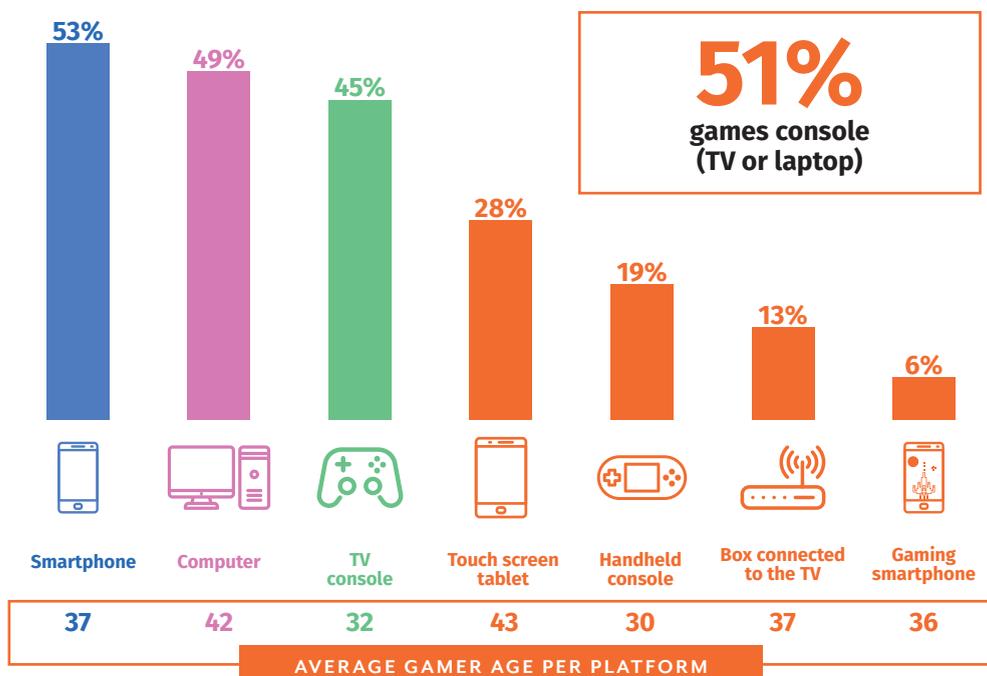


BREAKDOWN OF GAMERS  
BY REGION





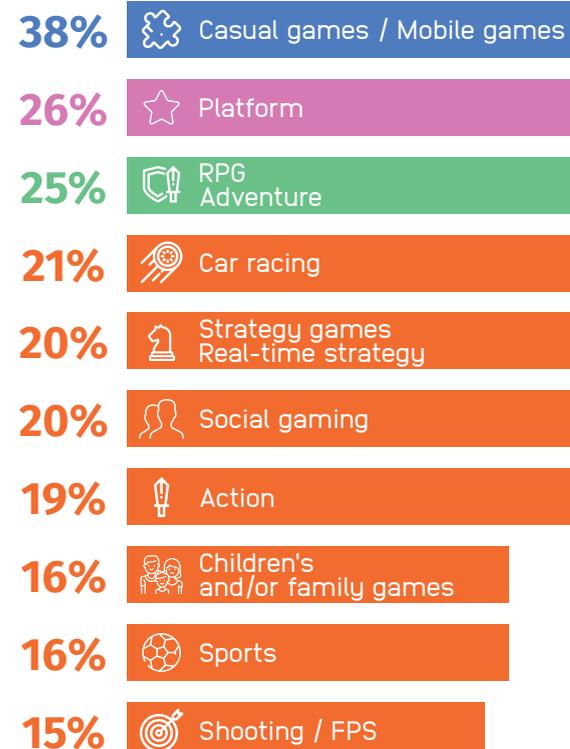
# DEVICES USED TO PLAY VIDEO GAMES



## NUMBER OF DEVICES USED FOR GAMING



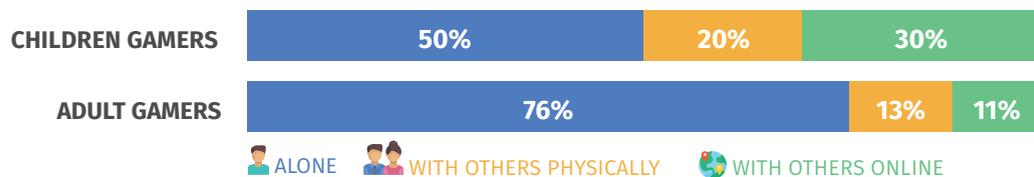
# TOP 10 TYPES OF VIDEO GAMES IN FRANCE IN 2020





# SOCIAL ASPECT OF VIDEO GAMING

## PLAYING ALONE OR WITH OTHERS



MORE THAN A THIRD OF VIDEO GAMERS PLAY ONLINE WITH OTHER PEOPLE



1 out of 5 gamers

FEELING OF BELONGING TO A COMMUNITY



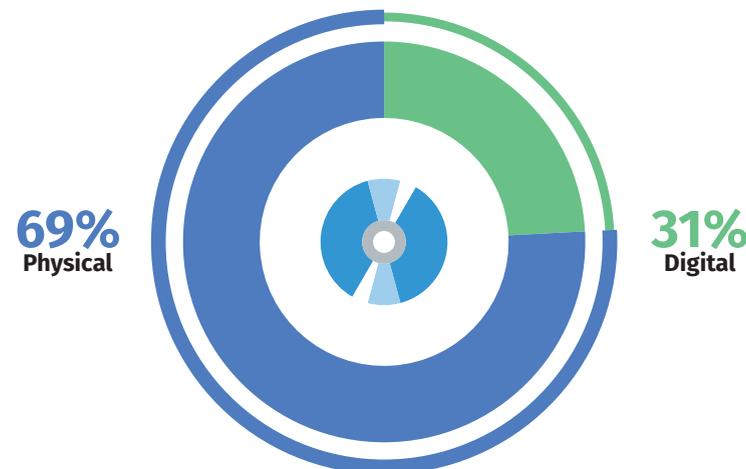
Nearly 1 out of 2 children

# PURCHASING DATA AND BEHAVIOUR

## PREFERRED PLACE TO BUY VIDEO GAMES



## PREFERRED FORMAT OF VIDEO GAMES PURCHASED



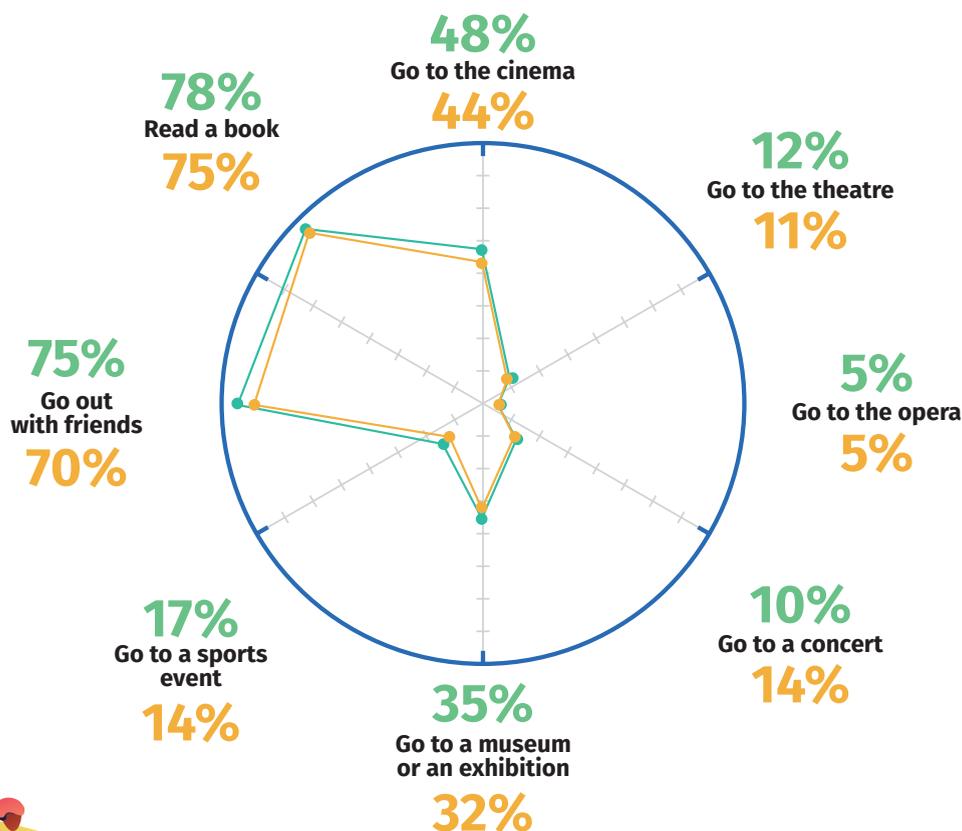


# CULTURAL GAMER HABITS

# MULTIMEDIA GAMER HABITS

## CULTURAL ACTIVITIES OVER THE LAST 6 MONTHS

Video game players (green line) All web users aged 10 and over (orange line)



## PLAY SPORT OR EXERCISE REGULARLY

57% YES

43% NO

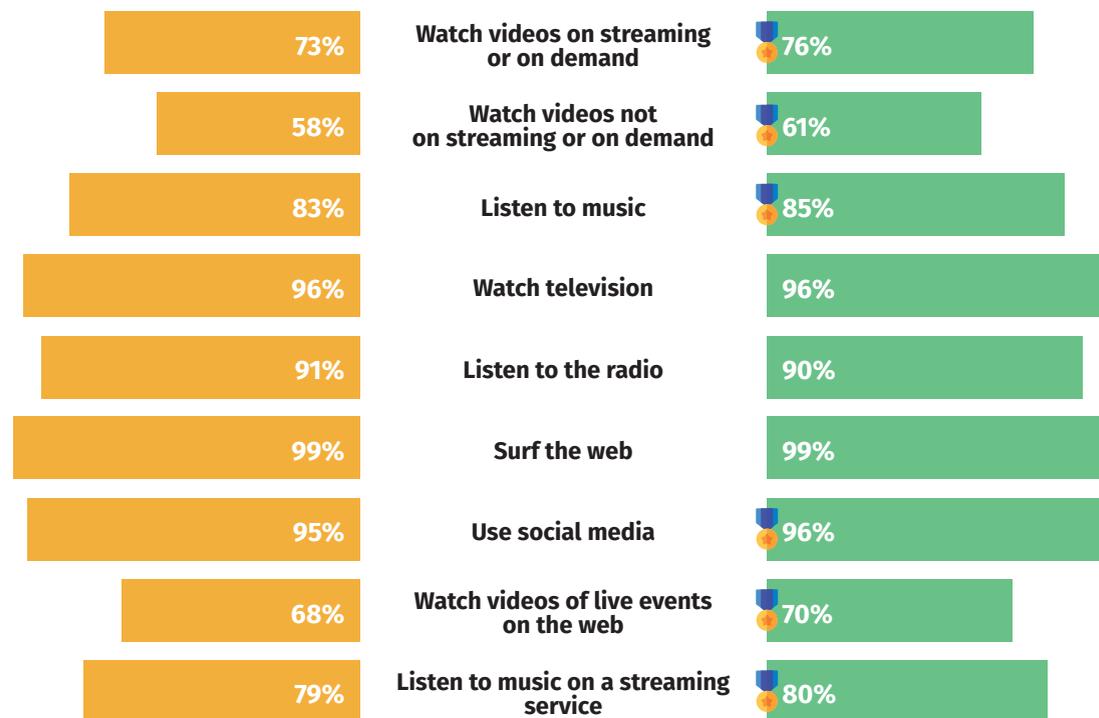
54% YES

46% NO

## ALL INTERNET USERS

## CULTURAL ACTIVITIES OVER THE LAST 7 DAYS

## VIDEO GAME PLAYERS

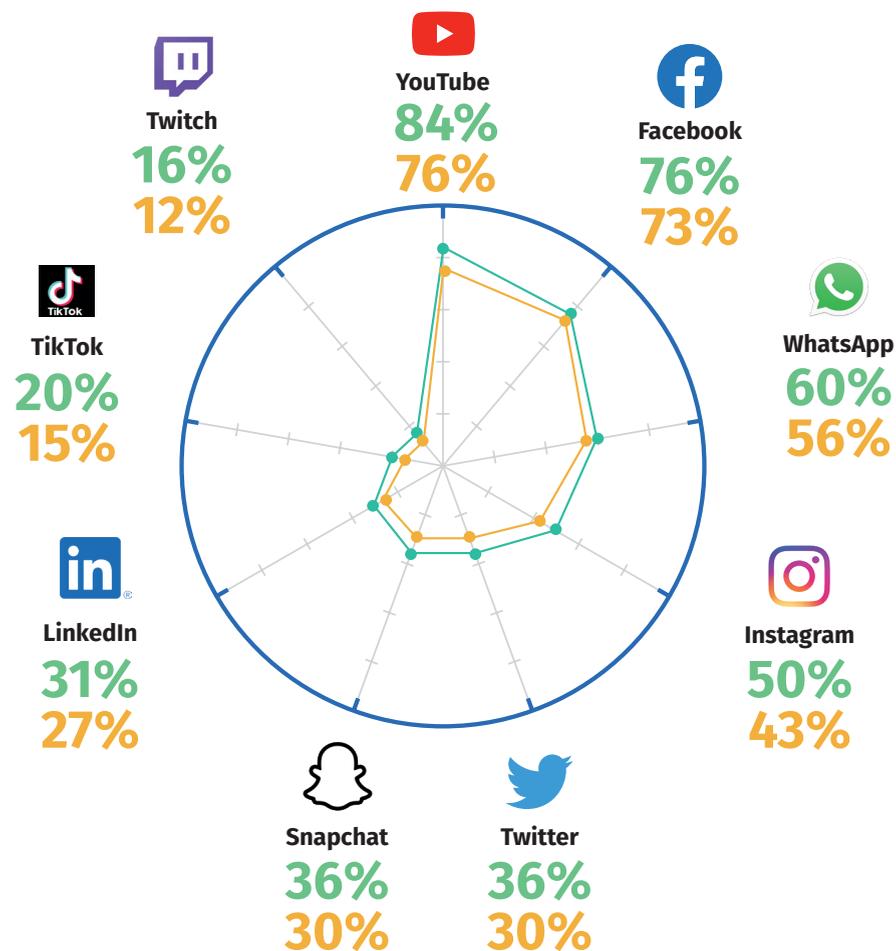




# GAMERS AND SOCIAL MEDIA

## USE OF SOCIAL MEDIA

Video game players (green) All web users aged 10 and over (orange)



# FRENCH PEOPLE AND VIDEO GAMING



More than half of gamers believe video gaming helps create social connections



**86%** of FRENCH PEOPLE consider video games an innovative sector

**81%** of FRENCH PEOPLE consider video games to be created by real artists

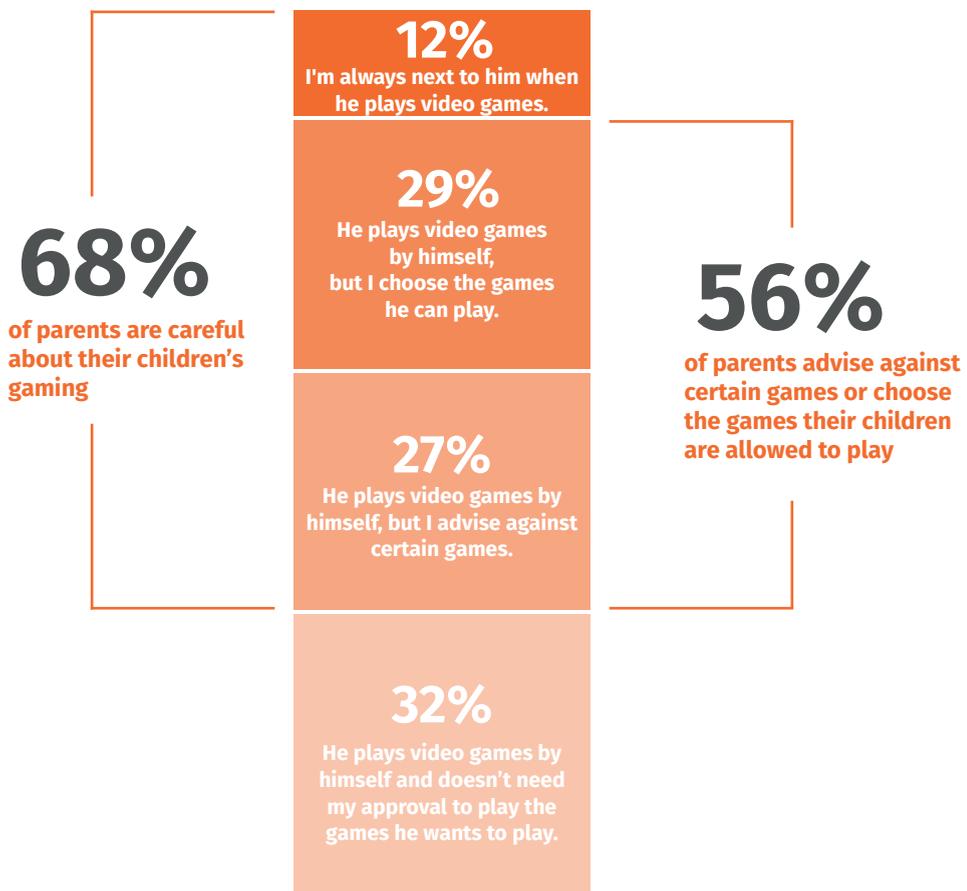
**72%** of FRENCH PEOPLE consider video gaming a leisure activity for the whole family

**61%** of FRENCH PEOPLE consider video gaming a positive activity

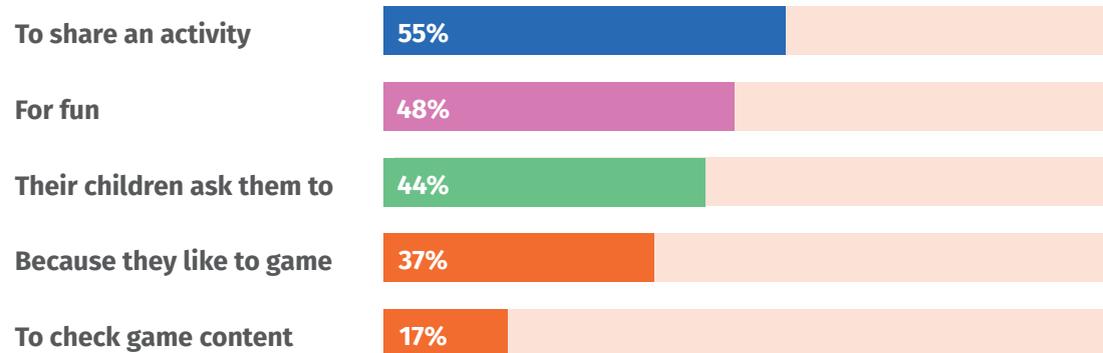


# PARENT BEHAVIOUR TOWARDS VIDEO GAMES

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

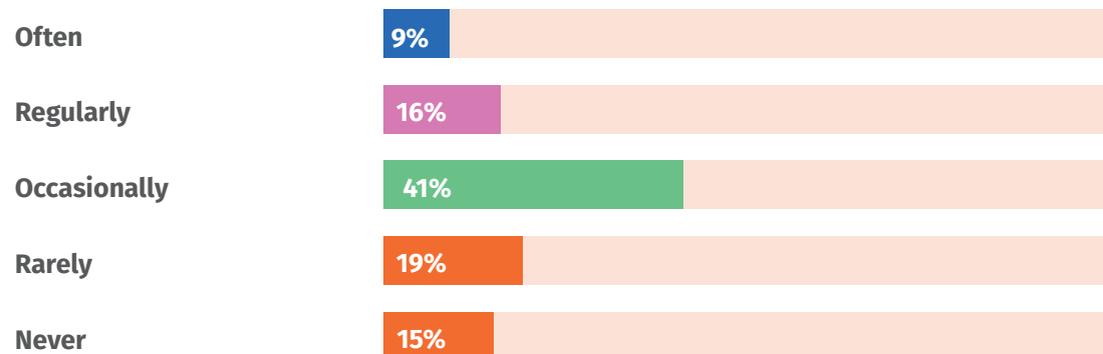


### WHY DO PARENTS GAME WITH THEIR CHILDREN?



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

### HOW OFTEN PARENTS GAME WITH THEIR CHILDREN





# PARENT BEHAVIOUR TOWARDS VIDEO GAMES

## KNOWLEDGE AND USE OF PARENTAL CONTROL

**88%** say they are aware of it

+5 pts VS 2019

**37%**

know about parental control and use it

**12%**

do not know about parental control

**51%**

know about parental control but do not use it

## KNOWLEDGE ABOUT THE PEGI SYSTEM



Children

**74%**

YES

NO



Adults

**59%**

YES

NO

+3 pts VS 2019

# THE ACT OF BUYING AND THE PEGI RATING SYSTEM

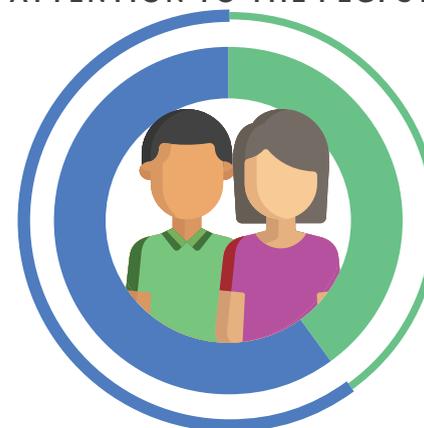
## ATTITUDE TO THE PEGI RATING SYSTEM

### PARENTS

#### PAY ATTENTION TO THE PEGI SYSTEM

+4 pts VS 2019

**60%** YES



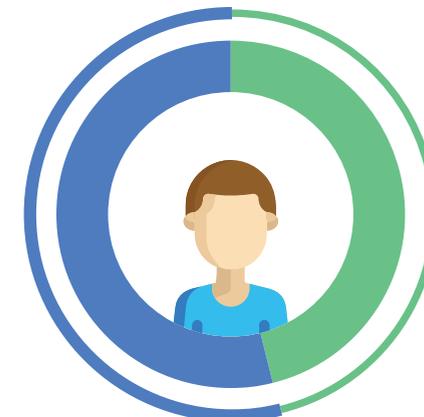
**40%** NO

### CHILDREN

#### PAY ATTENTION TO THE PEGI SYSTEM

+8 pts VS 2019

**54%** YES



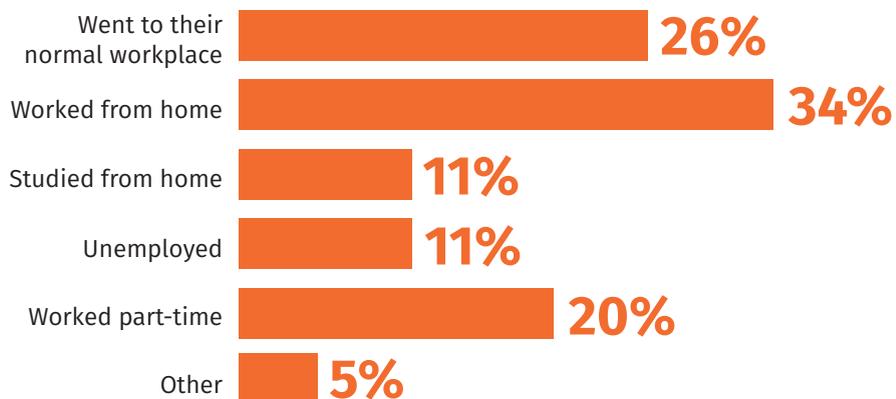
**46%** NO



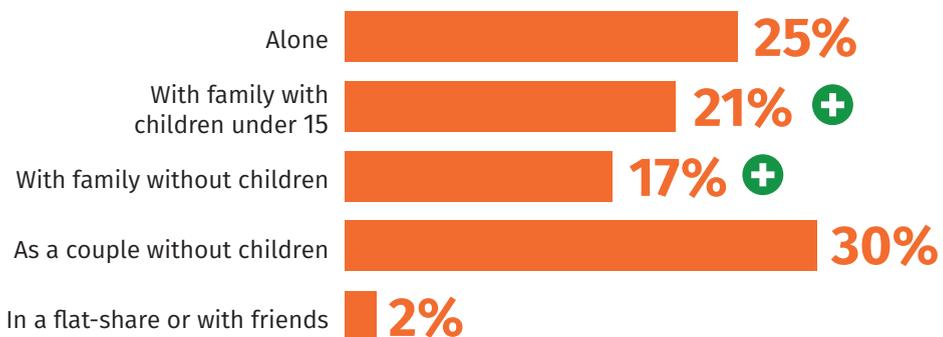
# IMPACT OF LOCKDOWN

## SITUATION OF VIDEO GAMERS

Professional situation



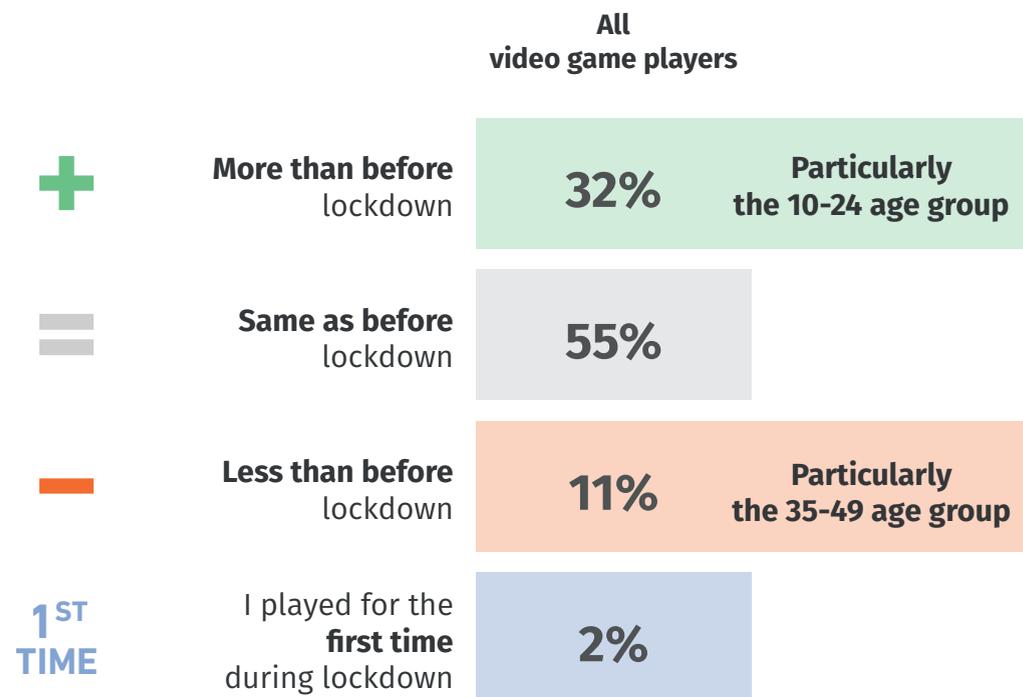
Personal situation



+ Significantly higher than all other web users

# IMPACT OF LOCKDOWN

## ON PLAYING VIDEO GAMES



1<sup>ST</sup> TIME

**36%**  
of players say that video gaming helped them stay in contact with their family and friends.



CHAPTER 2  
**TYOLOGY OF  
VIDEO GAMERS**

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# TYPOLGY METHODOLOGY

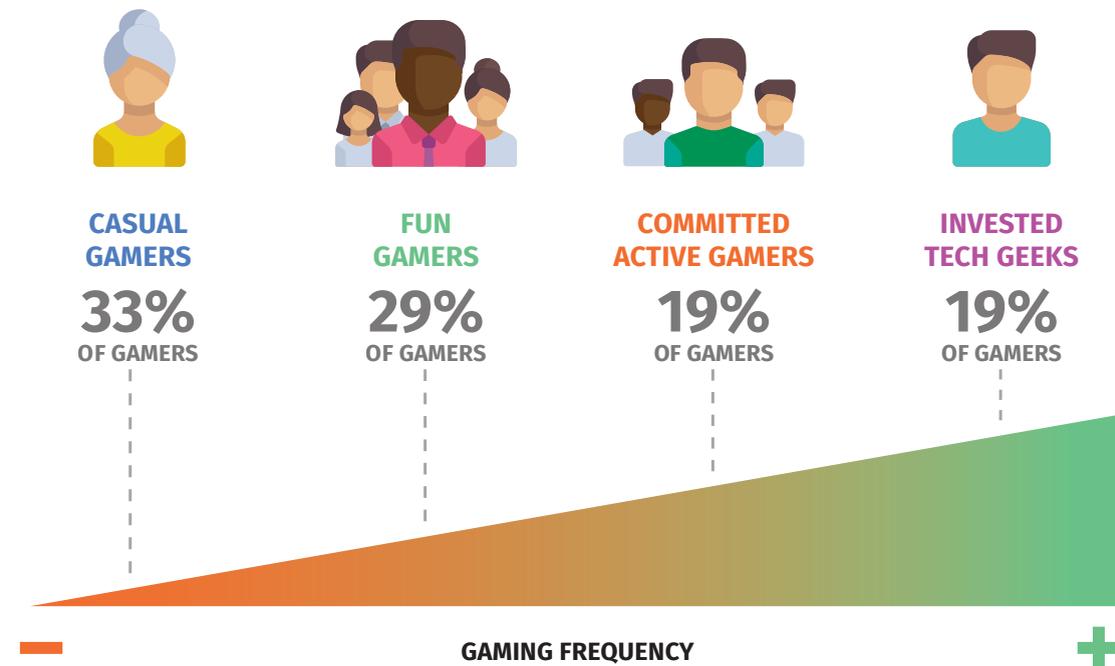
## Objectives of the typology

- 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

## 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

# GROUP HIERARCHY BASED ON GAMING FREQUENCY





# CASUAL GAMERS

# FUN GAMERS



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

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

**33%**  
OF GAMERS



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

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

**29%**  
OF GAMERS

## GAMING FREQUENCY



**70%** play video games  
at least once a day  
**52%**

**66%** have played video games  
for less than 5 hours  
over the last 7 days  
**59%**

## Device



**56%** play on 1 device  
**41%**

**59%** play on a regular smartphone  
**53%**

**35%** play on a touch screen tablet  
**28%**

**74%** do not have a console  
**34%**

## GAMING FREQUENCY



**33%** play once  
or twice a week  
**21%**

**72%** have played video games  
for less than 5 hours  
over the last 7 days  
**59%**

## Device



**72%** play on  
a games console  
**51%**

**34%** play on  
2 devices  
**29%**

## Social interaction



**90%** play alone  
**73%**

**89%** do not feel like  
they belong to  
a gamer community  
**78%**

## Type of games played



**53%** casual/mobile  
games  
**38%**

## Social interaction



**17%** play with other  
people in the same  
room  
**14%**

## Type of game played



**22%** children's  
and/or family  
games  
**16%**

**21%** sports  
games  
**16%**

Casual gamers All video gamers

Fun gamers All video gamers



# COMMITTED ACTIVE GAMERS



**55%** Men  
**43%** 15-34 year-olds

**50%**  
**34%**

**19%**  
OF GAMERS

## Gaming frequency



**60%**  
play video games  
at least once a day

**20%**  
have played video games  
for over 10 hours  
over the last 7 days

**52%**

**15%**

## Device



**56%**  
play on  
a computer

**49%**

## Social interaction



**56%** play on line **37%**

**22%** play with others  
online **14%**

**34%** feel like they belong  
to a gamer community **22%**

## Type of games played



**32%**  
role-playing/  
adventure games

**25%**

## Purchases



**31%**  
subscribe to  
a gaming platform

**16%**

Committed active gamers All video gamers

# INVESTED TECH GEEKS



**67%** Men  
**50%** 10-24 year-olds  
**20%** Students

**50%**  
**30%**  
**10%**

**19%**  
OF GAMERS

## Gaming frequency



**33%**  
play  
several times a day

**22%**  
have played video games  
for over 15 hours  
over the last 7 days

**20%**

**9%**

## Device



**91%**  
play on a games console

**49%**  
play on 4 or more devices

**65%**  
have a latest  
generation console

**21%**  
have a virtual  
reality headset

**51%**

**14%**

**28%**

**7%**

## Social interaction



**81%** play on line

**56%** feel like they belong  
to a gamer community

**37%**

**22%**

## Type of games played



**61%**  
action  
games

**19%**



**67%**  
role-playing/  
adventure games

**25%**

## Purchases



**44%**  
subscribe to  
a gaming platform

**16%**

Invested tech geeks All video gamers



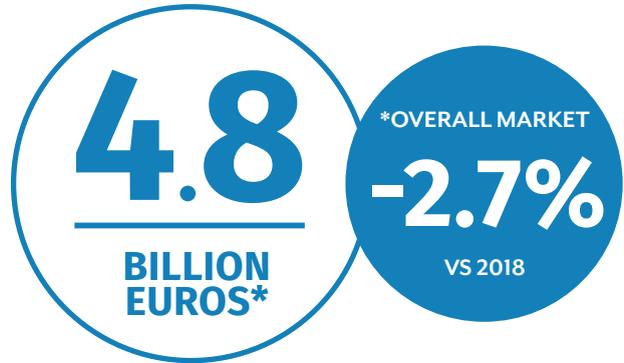
CHAPTER 3  
**THE FRENCH  
VIDEO GAME MARKET**

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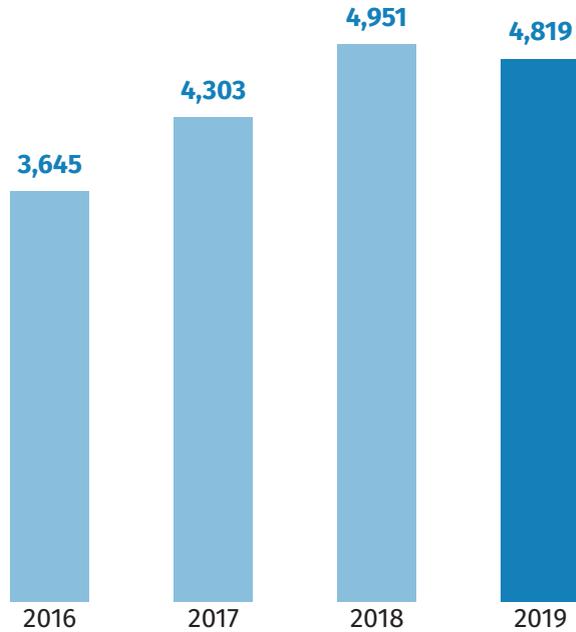


# 2019 MARKET REPORT

## TURNOVER

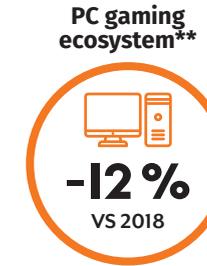


GROWTH IN MARKET SALES  
IN MILLION EUROS



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

# GROWTH IN SALES



GROWTH IN ECOSYSTEM SALES  
IN MILLION EUROS



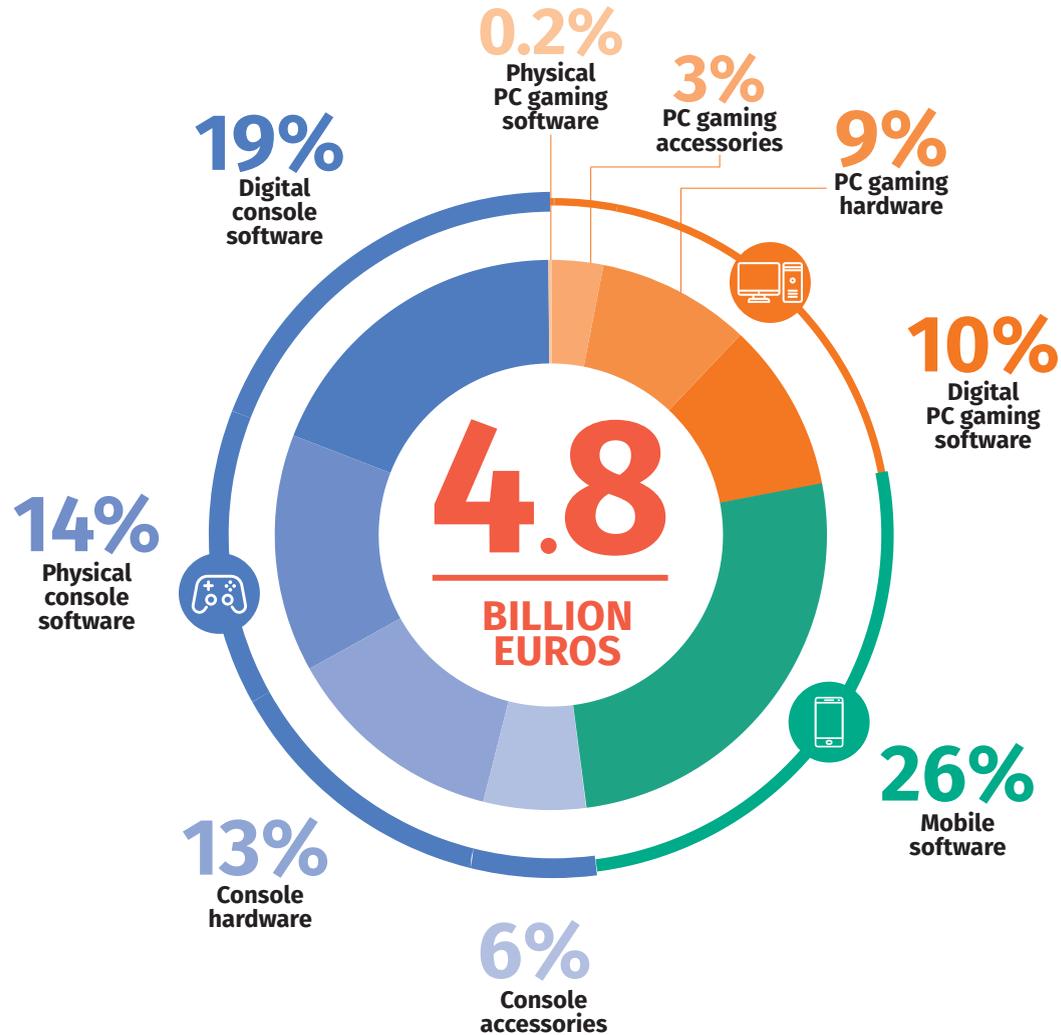
\*Ecosystems: Console + PC + mobile, physical and digital.

\*\*Source: SELL data, from GSD/GameTrack panels at end 2019.

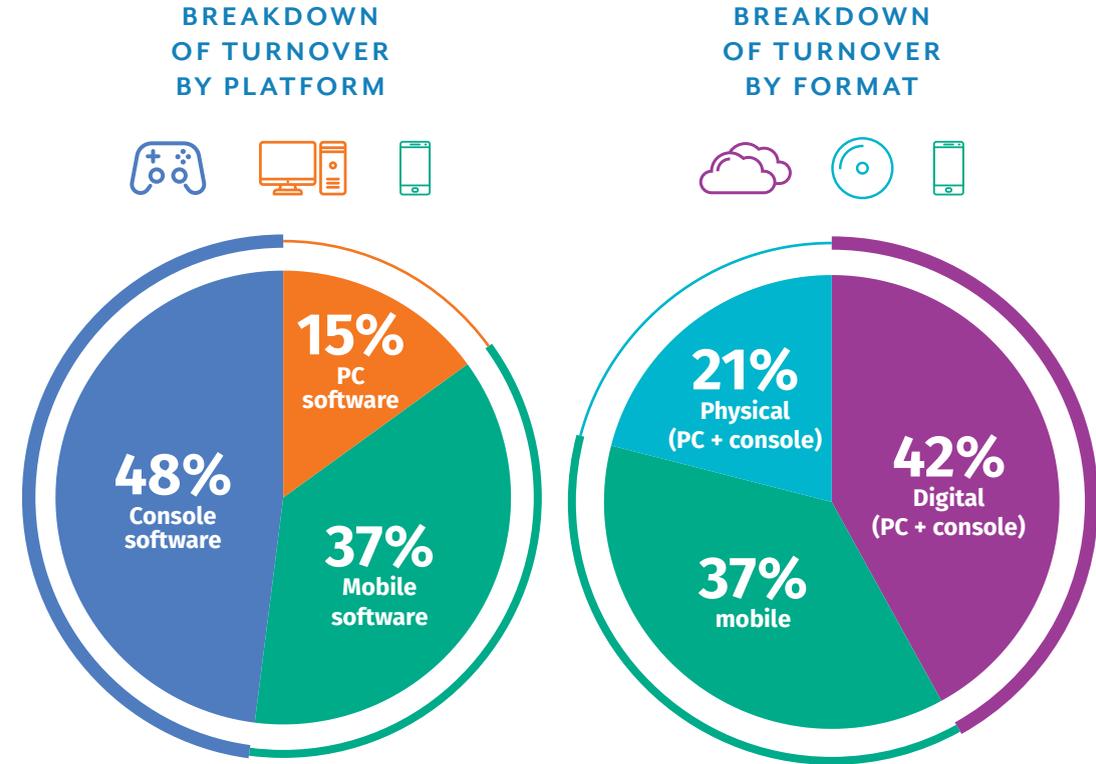
\*\*\*Source: GameTrack estimations using user spending data from App Annie 2019, converted into euros and including French taxes.



# CLOSE-UP: MARKET SHARE



# CLOSE-UP: SOFTWARE



## CHAPTER 4

# A RESPONSIBLE INDUSTRY



## TO HELP PARENTAL CONTROL

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

For several years, console manufacturers (Sony, Microsoft and Nintendo), Mac and Windows operating systems and also Google and most mobile terminals have been offering simple and effective solutions. Just a few minutes are required to configure the parental control and benefit from all its functions. These systems block access to games above a certain age or category in the PEGI rating system. They also control online purchases, limit web browsing, keep track of the time spent gaming 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, gaming, chatting with their children and more. The website PédagoJeux.fr - Video games explained to parents - is a mine of information: understand the gaming world, learn 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.



HOME CONSOLES	HANDHELD CONSOLES	MOBILES	COMPUTERS	WEB BROWSERS
Microsoft Xbox 360	Nintendo DS	Smart phones using Android	Windows operating system	Google Chrome
Microsoft Xbox One	Nintendo 3DS	Tablets using Android	Windows operating MacOS	Apple Safari /WebKit
Microsoft Xbox Series	Sony PSP			Mozilla Firefox
Nintendo Wii U	Sony PlayStation Vita			
Nintendo Switch				
Sony PlayStation 3				
Sony PlayStation 4				
Sony PlayStation 5				



# 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.

<b>3</b> www.pegi.info								
<b>7</b> www.pegi.info	✓		✓					
<b>12</b> www.pegi.info	✓	✓	✓	✓	✓			
<b>16</b> www.pegi.info	✓	✓		✓	✓			
<b>18</b> www.pegi.info	✓	✓		✓	✓	✓	✓	✓

<b>CREATED IN 2003</b>	<b>PRESENT IN 38 COUNTRIES</b>	<b>NEARLY 30,000 APPROVED GAMES</b>	<b>FEDERATING 1,800 MEMBER COMPANIES</b>
------------------------	--------------------------------	-------------------------------------	--

**3**  
www.pegi.info

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

**12**  
www.pegi.info

Violence towards fantasy characters or unrealistic violence towards human characters. Moderate foul language, nudity, horror.

### THE LABELS

**16**  
www.pegi.info

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

**7**  
www.pegi.info

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

**18**  
www.pegi.info

Extreme violence to defenceless or innocent human characters. Idealisation of drug use. Sexual expression or activity.

This game contains bad language.

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

This game contains violent scenes.

This game contains images which may encourage discrimination.

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

This game may frighten young children.

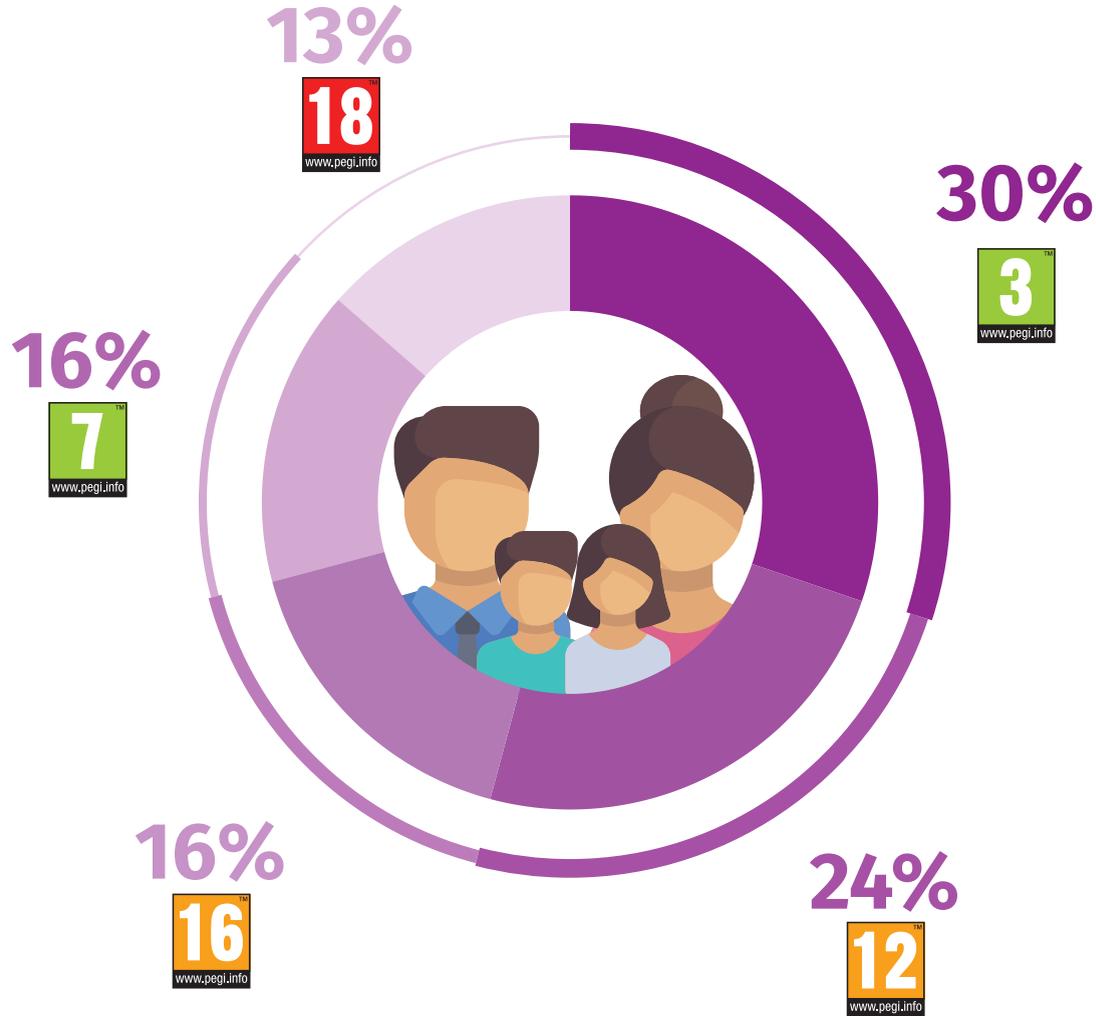
This game encourages and/or teaches gambling.

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



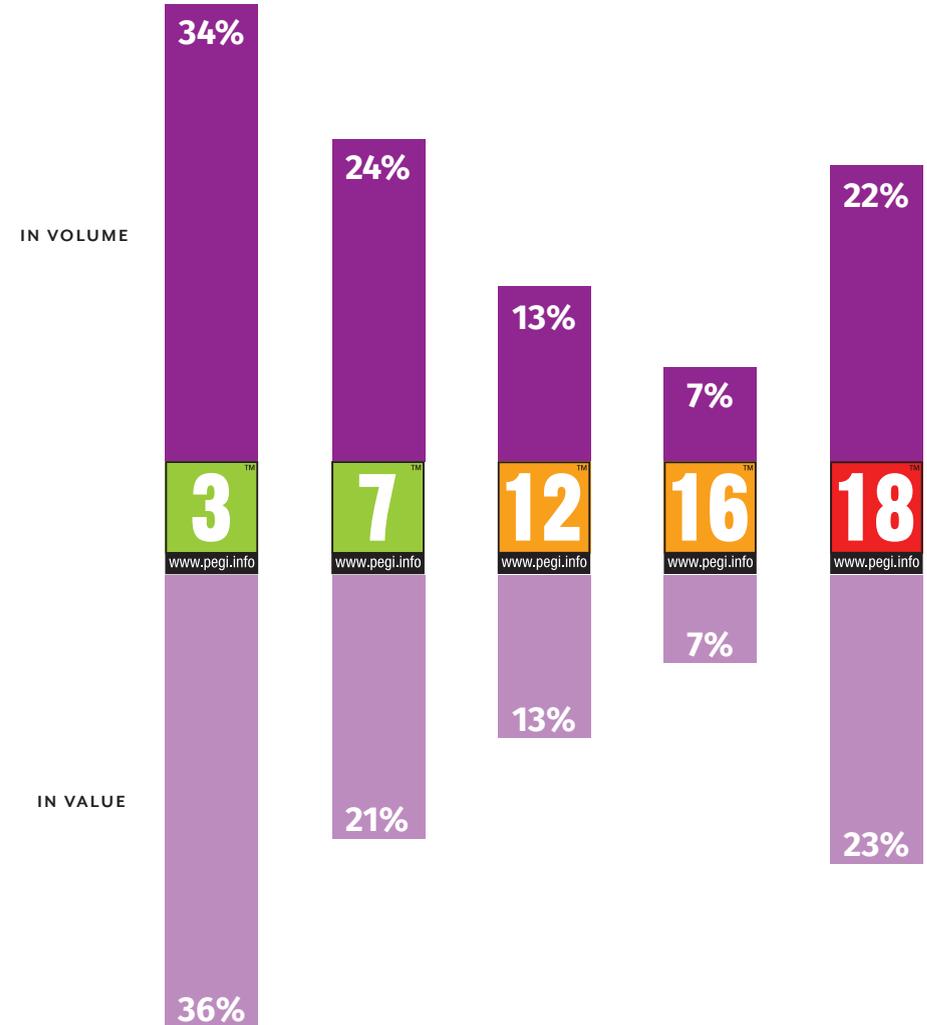
# PEGI ANALYSIS OF THE 2019 OFFER

PHYSICAL MARKET



# PEGI SALES ANALYSIS, MARKET SHARE IN 2019

PHYSICAL MARKET



## CHAPTER 5

# THE UNION OF VIDEO GAME PUBLISHERS



## THE MISSIONS OF SELL

**T**he Union of Video Game Publishers (SELL) was founded in 1995 by key players on the video game market. To support the growing video game industry and its accessibility, video game professionals (console manufacturers, game publishers, accessory manufacturers, etc.) needed to speak with the same voice. Following the example of the Interactive Software Federation of Europe (ISFE) which defends the interests of the video gaming sector on a European level, SELL immediately became the primary contact for French public institutions, the media and different associations.

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

SELL's main objective is to promote video games and gaming with the general public, national and European stakeholders and the authorities. For this, SELL organises two shows every year, the Interactive & Digital Entertainment Festival (IDEF) and Paris Games Week (PGW), federating the main operators in the video game sector.



# 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 is 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.

In this way, the organisation operates in many areas to raise the awareness of gamers, 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 gaming industry and associations. Its aim is to guide parents and educators through the world of video gaming.
- 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 VIDEO GAMES

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 gaming ecosystem every year to share the sector's new products with gamers. The 2019 edition hosted some 317,000 visitors and 194 exhibitors.



## STRUCTURE MARKET INFORMATION

SELL works with partners to provide the whole ecosystem with reliable studies on the video game market, gamer 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



## PROMOTING THE INDUSTRY'S INNOVATIONS, GAMERS AND RESPONSIBILITY

### TERRAINS DE JEUX



This video documentary accompanied by a special issue of *Essential Video Games* explores fifty years of technological innovations. What are the major phases that represented this industry's development? Which technologies from video games have spread to other sectors? What are the current video game trends that are shaping our future? A panel of video game industry experts attempts to answer all these questions.

SELL has developed key devices to shed light on essential issues for the sector. Embracing an informative, educational and promotional approach to the video game industry, throughout the year SELL gives a voice to gamers, talented people and experts through documentaries and video series.

### PLAYER PROFILE



Through this new web series, SELL interviews men and women gamers and particularly focuses on their many different passions. Fashion, running, painting, cinema... These hobbies may initially seem unconnected, but they are all linked. Creativity, competition, sharing...these talents are communicable and complement each other perfectly.

**YOU CAN FIND ALL THIS CONTENT AND MUCH MORE ON THE SELL.FR WEBSITE OR ON OUR YOUTUBE CHANNEL YOUTUBE.COM/SELLTV.**

### PLAY AS YOU ARE 2



This 9-minute video shows how video gaming is an inclusive activity for people with disabilities. Professionals, charity workers and people with disabilities discuss initiatives that have made gaming accessible to all and helped change society's views of disability. Video gaming is a fantastic tool for breaking down barriers and getting everyone to play together.

### À VOUS DE JOUER



Meet different gamers who have launched original and constructive initiatives during lockdown.

### ART AND VIDEO GAMES



Through this documentary series of five episodes, SELL spotlights the relationship between classical art and video gaming. The process of creating a video game involves many artists and artistic references, drawing inspiration from the arts to create original works of great scope and diversity. From architecture to music, visual arts to literature and all other sources of inspiration, *Art & video games* invites gamers to learn more about the close links that bind them together.

### VIDEO GAMING IN A FEW FIGURES



Discover the main figures for the video game market in three minutes.

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