









Julie Chalmette Chairwoman

Emmanuel Martin General Delegate e.martin@sell.fr Anne Sophie Montadier Communication and Marketing Manager as.montadier@sell.fr Meryl Pioche Marketing Manager m.pioche@sell.fr

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

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ESSENTIAL VIDEO GAME NEWS

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PROFILES OF FRENCH GAMERS



About the SELL "French public and Video gaming" survey

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

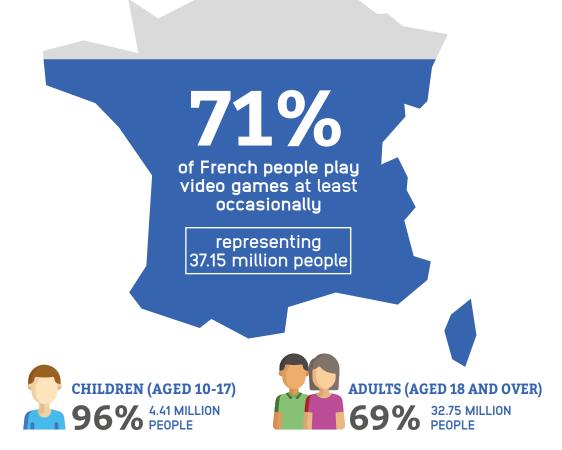
Survey carried out online from 2nd to 27th September 2019 with a sample of 4,049 people aged 10 and over, representing web users living in France.

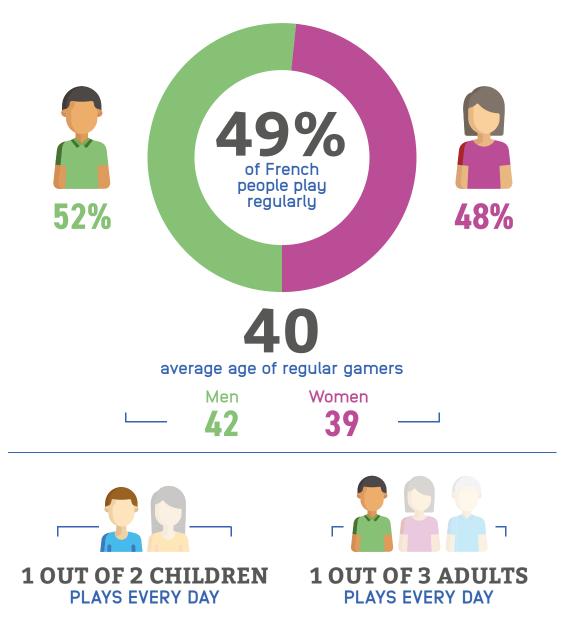
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PROFILES OF FRENCH GAMERS

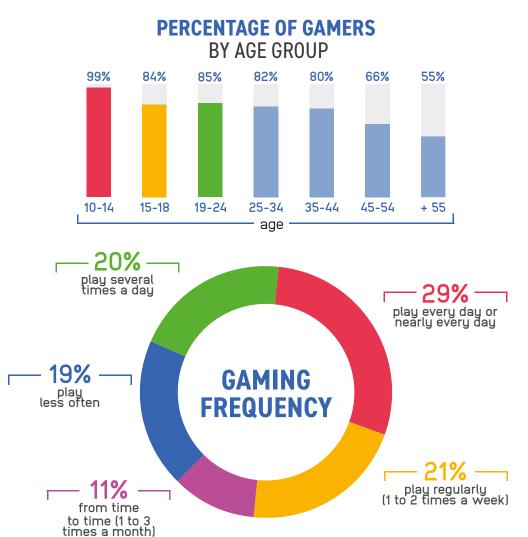
VIDEO GAMING IN FRANCE







FRENCH GAMERS

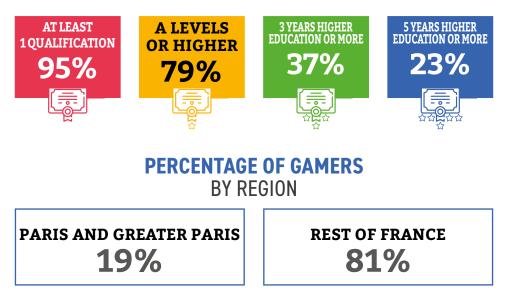


FRENCH GAMERS

PERCENTAGE OF GAMERS BY SOCIO-PROFESSIONAL CATEGORY



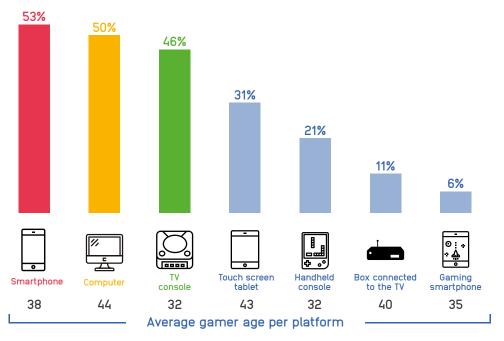
PERCENTAGE OF GAMERS BY EDUCATIONAL QUALIFICATIONS





PROFILES OF FRENCH GAMERS

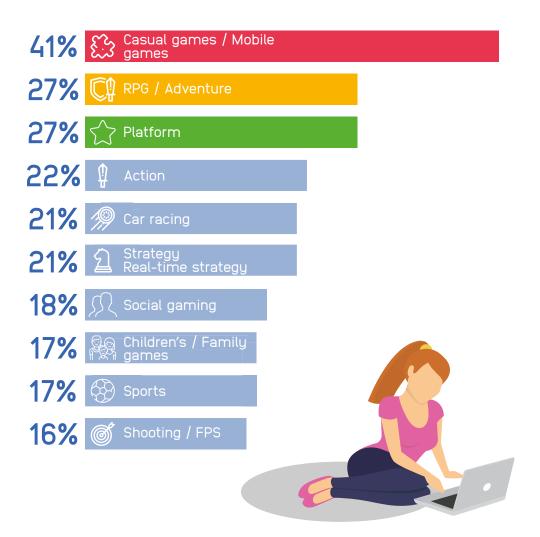
DEVICES USED TO PLAY VIDEO GAMES



NUMBER OF DEVICES USED TO GAME



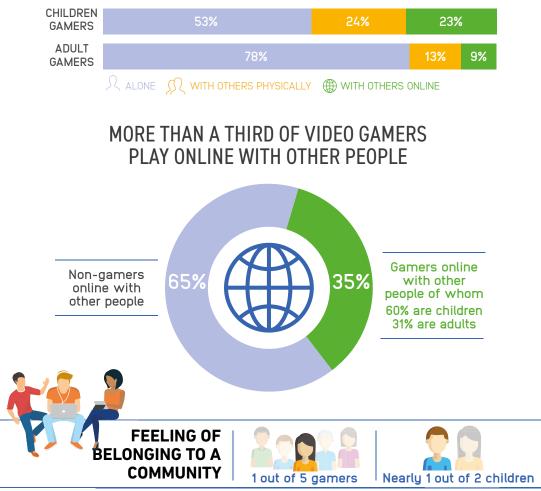
TOP 10 TYPES OF VIDEO GAMES IN FRANCE IN 2019





SOCIAL ASPECT OF VIDEO GAMING

PLAY ALONE OR WITH OTHERS

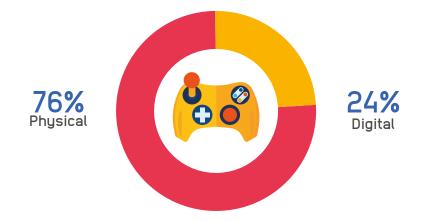


DATA AND PURCHASING BEHAVIOUR

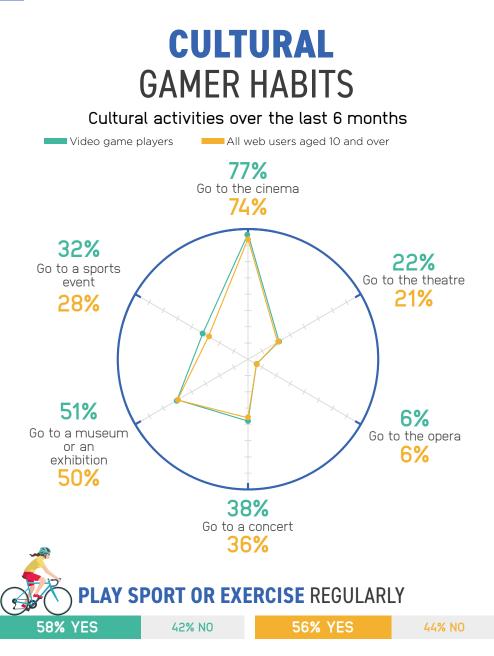
PREFERRED PLACE TO BUY VIDEO GAMES



PREFERRED FORMAT OF VIDEO GAMES PURCHASED



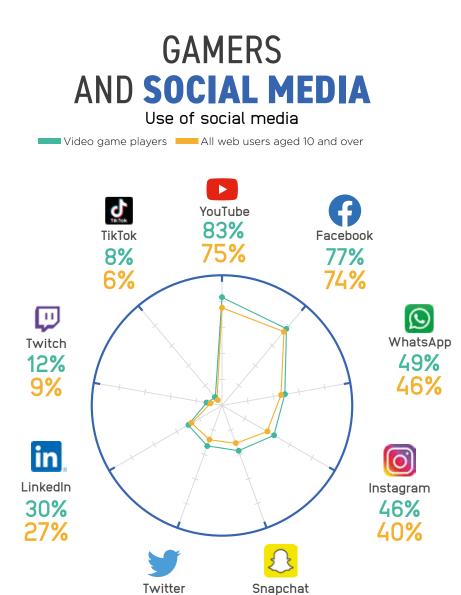




MULTIMEDIA GAMER HABITS

All internet users	Activity	Video game players
91%	Listen to the radio	91%
89%	Listen to music	92%
59%	Stream music	<mark>9</mark> 67%
96%	Watch television	96%
70%	Watch videos	<mark>9</mark> 78%
65%	Stream videos VOD / SVOD	<mark>9</mark> 73%
63%	Live stream videos	970%
84%	Read a book, graphic novel, manga, comic	<mark>9</mark> 87%
88%	Read magazines, newspapers	88%
99%	Surf the web	99%
81%	Use social media	<mark>9</mark> 85%





37%

31%

33%

28%

FRENCH PEOPLE AND VIDEO GAMES

NFARLY ONE OUT OF EVERY TWO ADULTS BELIEVES THAT VIDEO GAMES HAVE A POSITIVE IMPACT ON CHILDREN'S DEVELOPMENT



-87% -- **82%** -- **73%** -- **60** OF FRENCH PEOPLE consider video dames an innovative sector

OF FRENCH PEOPLE consider video games to be created bu real artists

OF FRENCH PEOPLE consider video gaming a leisure activity for the whole familu





PARENT BEHAVIOUR TOWARDS VIDEO GAMES

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

71%

of parents are careful about their children's gaming

17%

I'm always next to him when he plays video games

32%

He plays video games by himself, but I advise against certain games

22%

He plays video games by himself, but I choose the games he can play

29%

He plays video games by himself and doesn't need my approval to play the games he wants to play

54%

of parents advise against certain games or choose the games their children are allowed to play





WHY DO PARENTS GAME WITH THEIR CHILDREN?

To share an activity

For fun

Their children ask them to

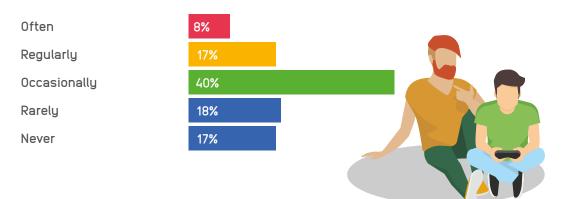
Because they like to game

To check game content

71%			
56%			
49%			
42%			
20%			

65% of parents say they play with their children at least occasionally

HOW OFTEN PARENTS GAME WITH THEIR CHILDREN





PROFILES OF FRENCH GAMERS

PARENT BEHAVIOUR TOWARDS VIDEO GAMES

KNOWLEDGE AND USE OF PARENTAL CONTROL

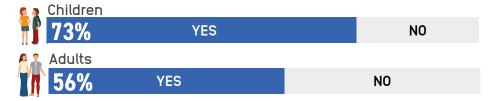




Do not know about parental control

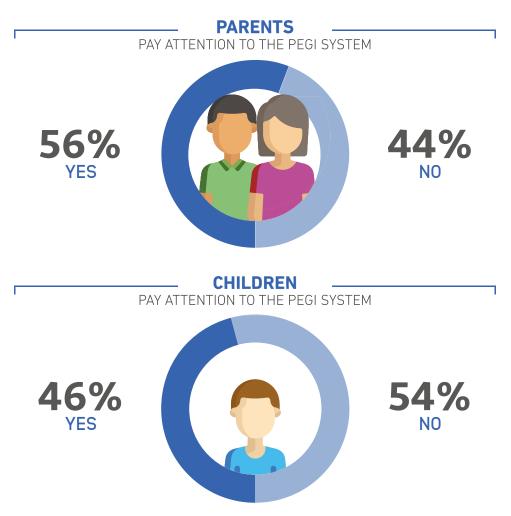
59% Know about parental control but do not use it

KNOW ABOUT THE PEGI SYSTEM



THE ACT OF BUYING AND THE PEGI RATING SYSTEM

ATTITUDE TO THE **PEGI* RATING SYSTEM**





KEY FIGURES FOR THE FRENCH MARKET



NEW PANELS

Estimations for 2018 turnover are the result of collaboration between three organisations providing SELL their data, for 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

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 19 European countries. The GSD digital panel today covers 43 countries in Europe, the Middle East, Africa and Asia-Pacific. The panel is operated by B2Boost.

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) 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.

GAMETRACK —

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 gamers, their buying behaviour across all platforms, helping to generate an in-depth view of their gaming 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.



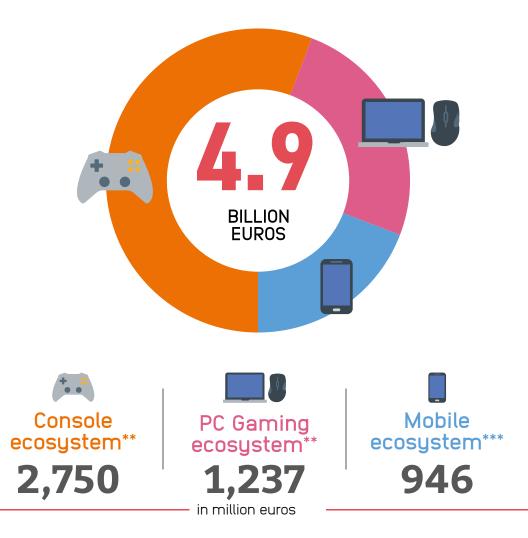
ABOUT APP ANNIE

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.



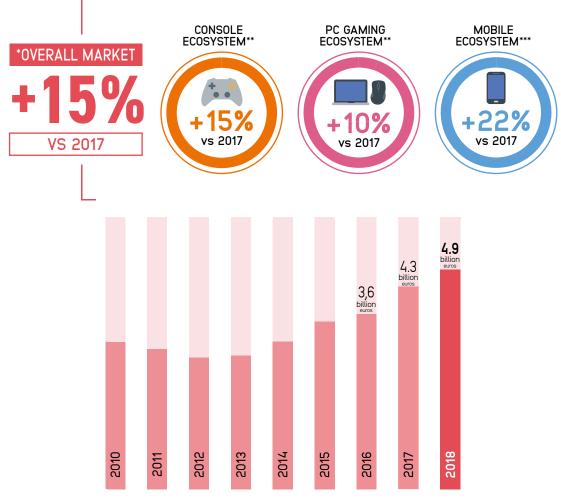
KEY FIGURES FOR THE FRENCH MARKET

2018 MARKET REPORT TURNOVER



***Source: GameTrack estimations using user spending data from App Annie 2018, converted into euros and including French taxes.

GROWTH **IN SALES**

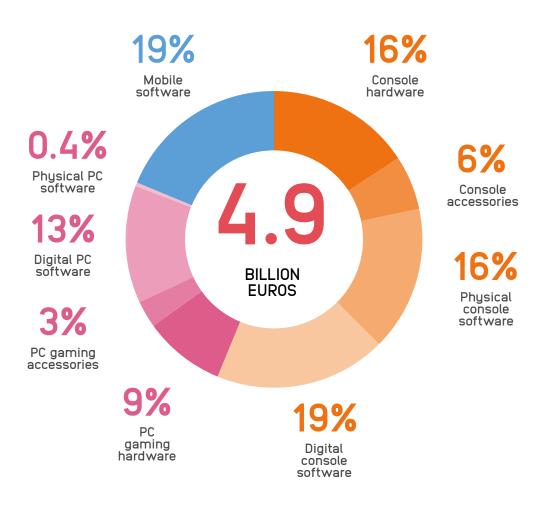


Ecosystems: Console + PC gaming + mobile, physical and digital. **Source: SELL data, from GSD/GameTrack panels at end 2018. *Source: GameTrack estimations using user spending data from App Annie 2018, converted into euros and including French taxes.

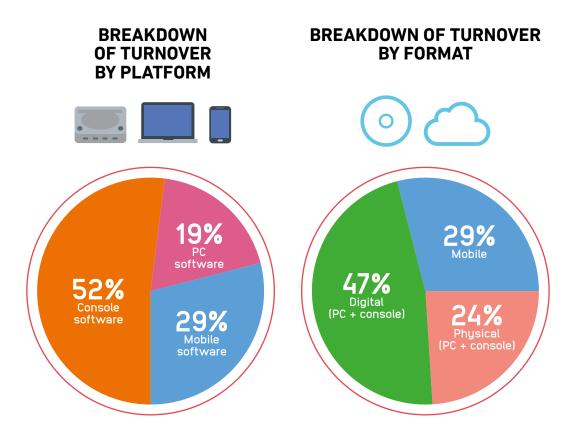


KEY FIGURES FOR THE FRENCH MARKET

CLOSE-UP: MARKET SEGMENTS



CLOSE-UP: SOFTWARE



CHAPTER 3

PARIS GAMES WEEK 2019

10TH EDITION OF PARIS GAMES WEEK PLAY, DISCOVER, CELEBRATE AND SHARE!

This 10th edition of Paris Games Week will be one to remember! In just a few years, the video game trade fair has established itself as one of the season's must-see events. One of the top 5 French trade fairs, PGW is a chance to discover a rich, complex ecosystem which combines technological innovation and artistic creativity. Going beyond stereotypes, the trade fair is the perfect opportunity to learn what video gaming can be: multifaceted, innovative, inclusive and celebratory.



rom 30th October to 3rd November, Paris Games Week 2019 will open its doors to all: old-school gamers, connoisseurs and novices, kids and parents, businessmen and families... Everyone will find something to enjoy in the 80,000m² of exhibitions spread across three halls. For its 10th edition, SELL, the organiser of Paris Games Week, has taken a big-picture approach to offer visitors the most enjoyable experience possible. Curious visitors will see plenty of surprises as they wander the aisles of the Paris Expo - Porte de Versailles.

AMBASSADOR FOR VIDEO GAMES SINCE 2010

A major event for all video game lovers, Paris Games Week has always positioned itself to reflect the industry and evolve with the times. eSports, streaming, cloud gaming, virtual reality, augmented reality: at every stage in the recent history of video gaming, PGW has shown itself to be THE occasion to discover all these new experiences. Once a guilty pleasure, now a universal form of entertainment, today video gaming is one of France's favourite activities. Video gaming offers a multifaceted universe and brings together a broad community around a shared passion. Families, publishers, developers, schools, cosplayers, e-gamers, streamers: above all, Paris Games Week celebrates this diversity.

What an exciting journey we've had over these past 10 years! Reflecting a pastime which has become part of everyday life in France, Paris Games Week has proven itself an essential event for all video gaming communities. We are delighted to celebrate the trade show's 10th edition with all the industry's talents and we are excited to welcome visitors to an edition which promises to be more fun than ever!

Julie Chalmette - SELL Chairwomar





of French people

have heard of

PGW

Of whom

know it very well

%

PARIS GAMES WEEK 2019



PédaGoJeux - video games explained to parents - is a collective that since 2008 has federated family associations, public authorities and private organisations like SELL. PédaGoJeux has a mission to help people understand video games and raise awareness about best practices for more peace of mind for families. PédaGoJeux guides parents and educators to help children with gaming. During Paris Games Week, you can meet the collective's representatives and chat with them in the PGW Junior zone.







P romoting sexual equality in the video game sector for over two years, Women in Games France helps promote diversity. Training, business incubators, round tables, interviews... The association launches concrete actions for women and non-binary people in the industry. This year, the association can be found at the "Jeux Made in France" booth. WIG will be showcasing female designers who will present the video games on which they have been working.



S ince 2013, the association has been working on making video games easier for people with disabilities to play. CapGame is committed to this initiative through five key directions: game tests, technological intelligence for software and material solutions, research, professional support and finally eSports. The association works alongside SELL to make Paris Games Week even more accessible and is also launching the "Play as you are" zone (Hall 2.2) where you will find associations specialising in video game accessibility.





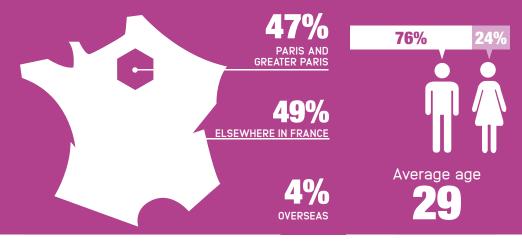


B orn of a desire to build social and intergenerational connections, since 2014 the Silver Geek association has been developing a programme, thanks to support from the MACIF Foundation, that enables seniors to learn about new technologies through video gaming. This project is joining regional eSport competitions for seniors. This year, Silver Geek is returning to present this competition on the PGW stage in Hall 3.



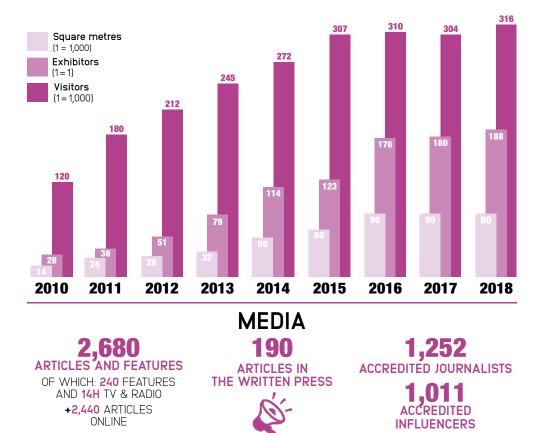
PARIS GAMES WEEK 2018 KEY FIGURES

FOR THE 9TH EDITION OF PGW: **316,000 VISITORS** UNITED BY THEIR PASSION FOR VIDEO GAMES



FOCUS ON VISITS TO PGW





SOCIAL MEDIA: A GLOBAL COMMUNITY OF OVER 848,000 FANS*



* Figures at end December 2018

GAMES AND CONSOLES
2- BOOTH EVENTS
3- INFLUENCERS

A RESPONSIBLE INDUSTRY

HERE 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.

or 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, get 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.



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.

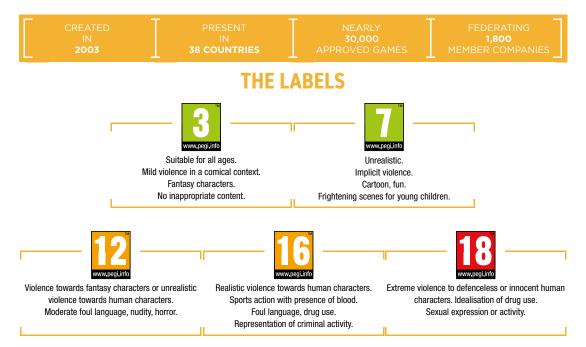
aunched in spring 2003, PEGI has replaced a certain number of national age ratings through unique labels that are now used in most European countries. The system enjoys the support of the leading console manufacturers, including Sony, Microsoft and

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. 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.



PEGI LABELS

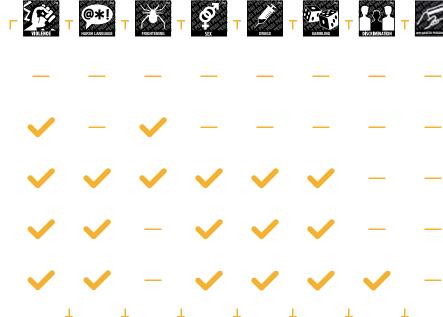


ww.pegi.int

w.peai.i

www.pegi.inf

v negi int





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



This game may frighten young children.



This game encourages and/or teaches gambling.

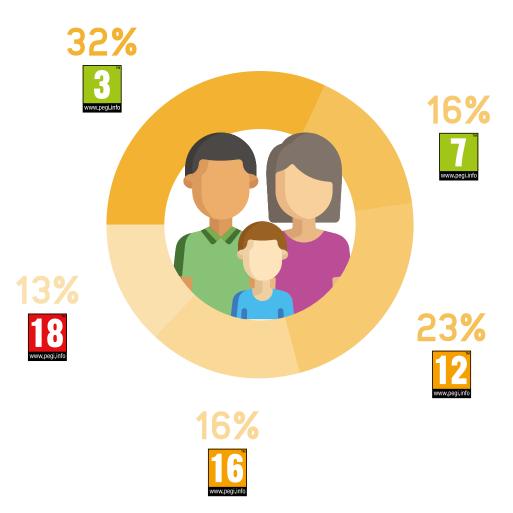


The game allows the player to buy virtual goods with real money.

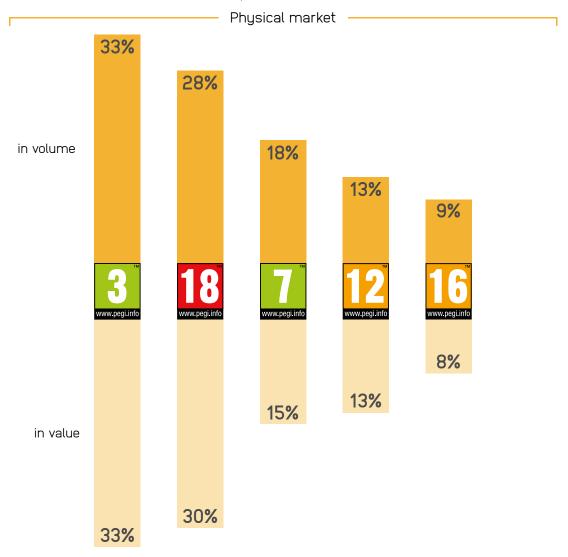


PEGI ANALYSIS OF THE 2018 OFFER

Physical market



PEGI SALES ANALYSIS, MARKET SHARE IN 2018



CHAPTER 5 SELL: SYNDICAT DES EDITEURS DE LOGICIELS DE LOISIRS UNION OF VIDEO GAME PUBLISHERS

THE MISSIONS OF SELL

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 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 accreditation by 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 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 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.



PROMOTE 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 2018 edition hosted some 316,000 visitors and 188 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 (mobiles) ISFE
- Occasional studies: French people and video games – SELL/Médiamétrie



SELL

PROMOTING THE INDUSTRY'S INNOVATIONS, GAMERS AND RESPONSIBILITY



This video documentary will be accompanied by a special issue of *Essential Video Games* exploring fifty years of technological innovations. What are the major phases that have 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.

ART ET JEUX VIDÉO



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 & jeux vidéo* invites gamers to learn more about the close links that bind them together. 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



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.

PLAY AS YOU ARE



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.

YOU CAN FIND ALL THIS CONTENT AND MUCH MORE on the sell.fr website or on our youtube channel youtube.com/selltv.



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Julie Chalmette Chairwoman

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