

3/3  
OCTOBER  
2015

# ESSENTIAL VIDEO GAME NEWS

MARKET DATA AND  
CONSUMPTION: FRANCE





The video game market enjoyed a return to growth in 2014, the proof of the massive and quick adoption of 8th generation consoles. For the first 9 months of 2015, migration to 8th generation continued at an accelerated rate. Over 7 million new generation consoles have been purchased since their launch. 2015 still has some surprises in store over the key last three months of the year. And the entire year has been supported by all industry stakeholders: games manufacturers, publishers and accessory manufacturers.

Gaming has become the 2nd largest cultural industry in France behind books. This vitality is the result of the incredible innovative power of the sector's key players. Video gaming is unique in its function and its development. Similarly a creator of media and content, our sector and its rich fabric are distinguished by their continuous mutation at the sustained rhythm of technological progress and console generations.



# Editorial

Publishers have pulled off the challenge of integrating these new opportunities in increasingly surprising creations, always at the service of the gaming experience. The renewal cycle for consoles is growing at a remarkable rate; the transition phase between the 7th and 8th generations has been a success. This is supported by strong development of games and accessories, which grow as the new generation of consoles becomes established.

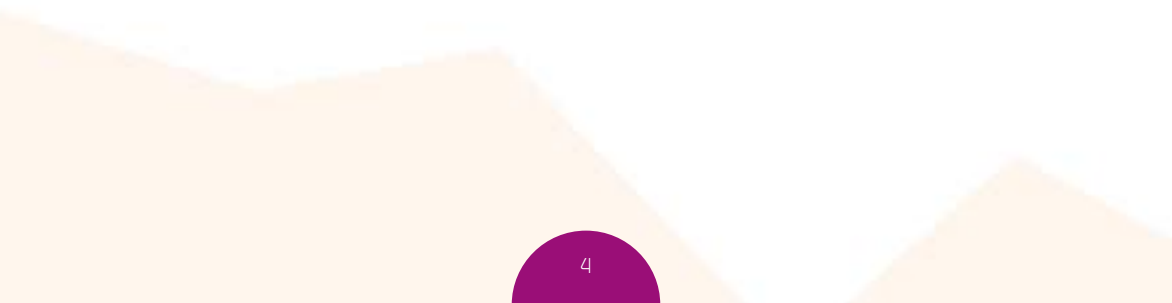
The industry's perspectives are very positive. With this new issue of Essential Video Game News for Paris Games Week, we are going to provide the most faithful portrait possible of French gamers. We are presenting the second edition of our study, focused on how gamers use the new generation consoles. Some of this data goes against our preconceptions.

Paris Games Week is designed to be the crossroads of all these components and trends from the gaming world.

We are pulling out all the stops to provide an event federating the entire industry and all involved in the sector, but above all an event that offers an unrivalled experience for the general public.

Enjoy the show and we'll see you in February 2016 for the next edition of Essential Video Game News, with a report on 2015!

**Jean-Claude Ghinozzi**  
Chairman of SELL



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



## Chapter 1

# Understanding the video game market: essential data

# 15 years in the making

**The history of video gaming in France dates back to the 1980s. The last twenty years have seen the industry and how it is used change dramatically. Today it is the 2nd largest cultural industry behind books. Gaming has slowly become generalised, entering every French home.**

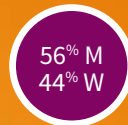
In the early 2000s, only 20% of the French population said they played video games, a large proportion being men with an average age of 21. 15 years later and one out of every two French people now say they play video games with almost equal sexual parity and an average age that extends way beyond 30.



PERCENTAGE  
OF GAMERS  
IN 2015



AVERAGE  
AGE  
IN 2015



MALE/FEMALE  
BREAKDOWN  
IN 2015

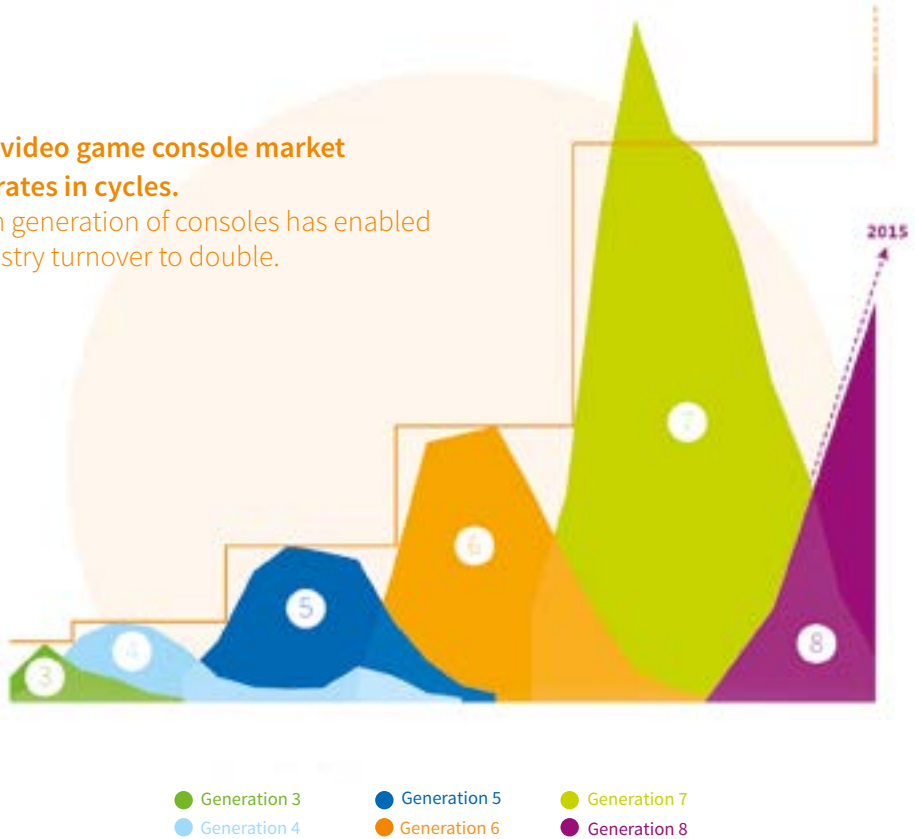
# A growing market

## Gaming console cycles

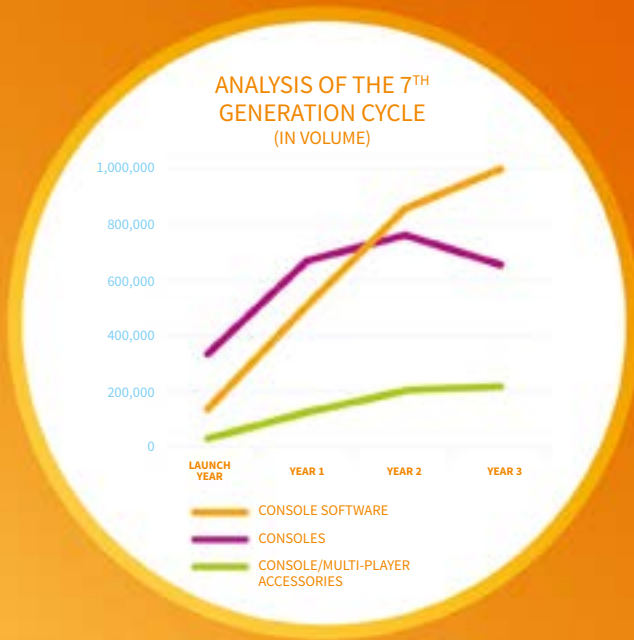
(Hardware + physical software)

**The video game console market operates in cycles.**

Each generation of consoles has enabled industry turnover to double.



# Close up: market segments



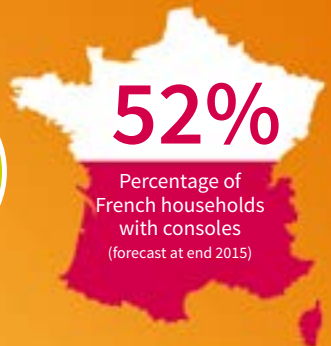
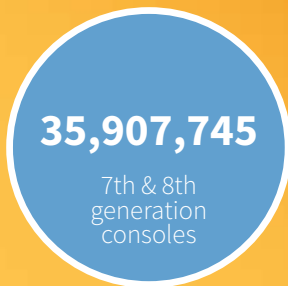
The arrival of a new generation of consoles creates a cycle between the different video game markets (hardware, software, accessories).

The cycle has three stages:

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

Source: GfK

## Consoles in France 7th and 8th generations at end 2015



Source: GfK / Panel data at end September 2015

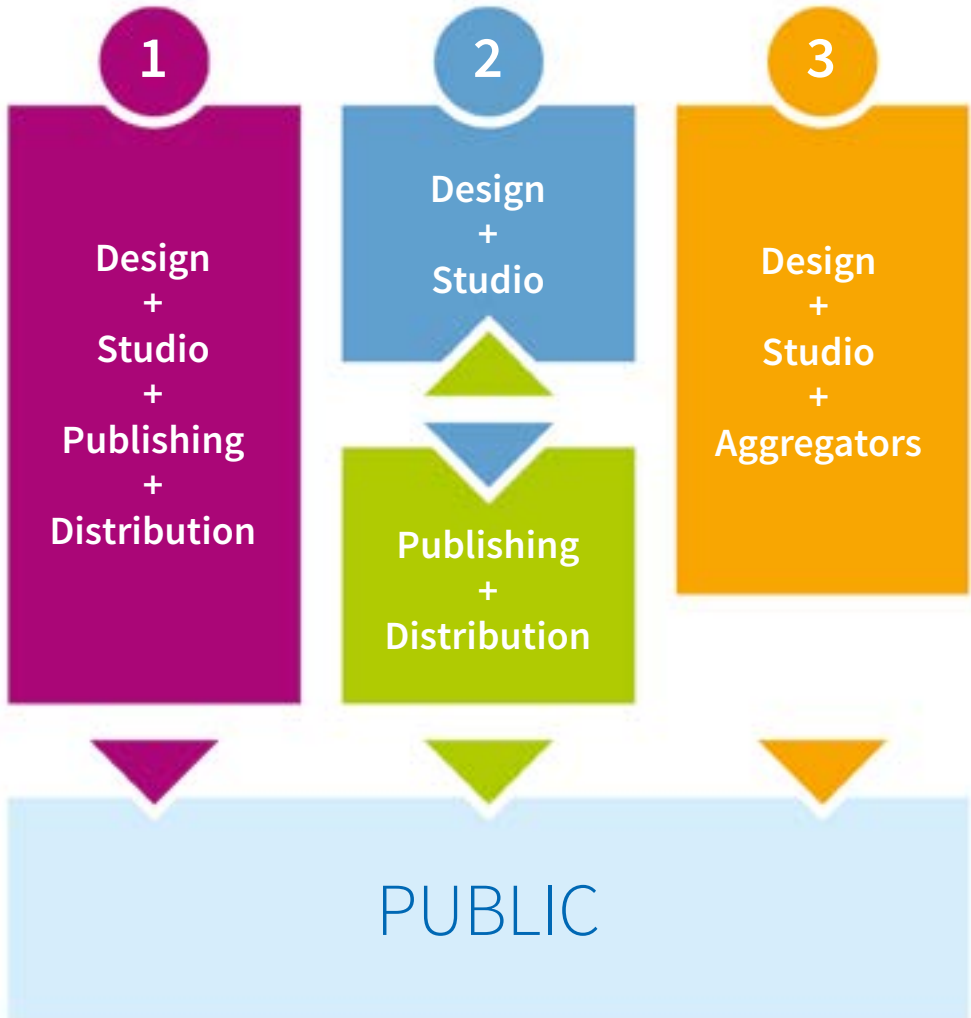


# The video game ecosystem



# Business models

## The 3 business models of video gaming



# The life of a physical video game





## Chapter 2

# French market and industry forecast



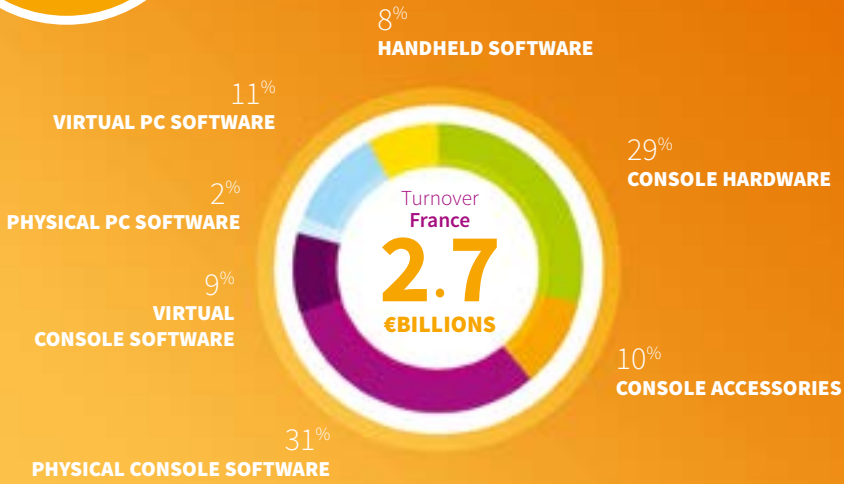
# 2014 market report

## First return to growth since 2008



**VIDEO GAMING:  
THE ONLY PHYSICAL  
ENTERTAINMENT  
MARKET THAT  
ENJOYED GROWTH  
IN 2014**

**FRANCE IS IN THE TOP 3  
EUROPEAN MARKETS**  
with Great Britain and Germany



Sources: SELL estimation, using GfK panel data at end 2014

# January - September 2015

**7 MILLION  
GENERATION 8  
CONSOLES**

at end September 2015



**+40%**  
in volume

**RISE**  
in software  
sales  
for 8th generation

at end September 2015  
(vs January / September 2014)

**+40%**  
in value

**+10%**  
in volume

**RISE**  
in sales for  
accessories

at end September 2015  
(vs January / September 2014)

**+8%**  
in value

Sources: Panel GfK, at end September 2015

## 2015 PERSPECTIVES: CONFIRMED GROWTH FOR THE ENTIRE MARKET

**GfK ESTIMATION  
FOR TURNOVER  
AT END 2015**

**+8%**

(Scope: physical or  
physical and virtual)

# Chapter 3

## Profiles of French gamers



### **About the SELL "French public and Video gaming" survey**

The "French public and Video gaming" survey was carried out by GfK for SELL with the aim of measuring and understanding video game use and purchases in France. For this survey, a panel of 1,002 people aged 10 to 65 were interviewed in October 2015.



# Gaming: the 2nd largest leisure industry in France behind books

**74%**

of French people consider video gaming

**A LEISURE ACTIVITY FOR THE WHOLE FAMILY**

**67%**

of French people consider video gaming

**A NEW CULTURE**

**60%**

of French people consider video gaming

**A POSITIVE ACTIVITY**

# Video gaming: a leisure activity for everyone

**53%**

**OF FRENCH PEOPLE  
PLAY REGULARLY**  
(10-65 year-olds)

**74%**

**OF FRENCH PEOPLE  
PLAY AT LEAST  
OCCASIONALLY**  
(10-65 year-olds)

**56%**  
MEN

**44%**  
WOMEN

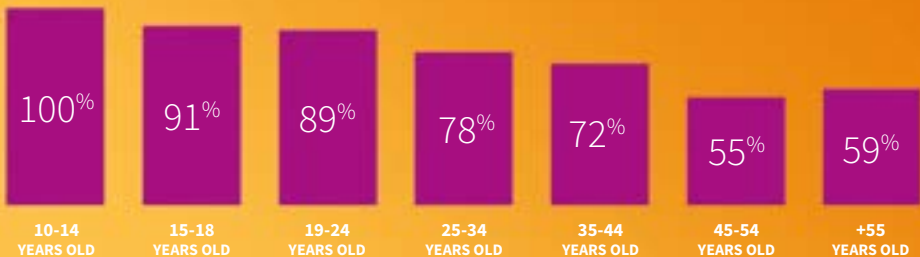
**35**  
**years old**

**AVERAGE AGE  
of video gamer**

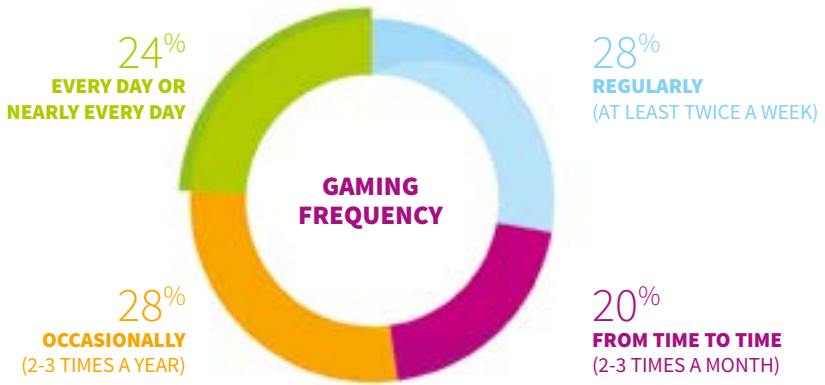
**37**  
**years old**  
MEN

**33**  
**years old**  
WOMEN

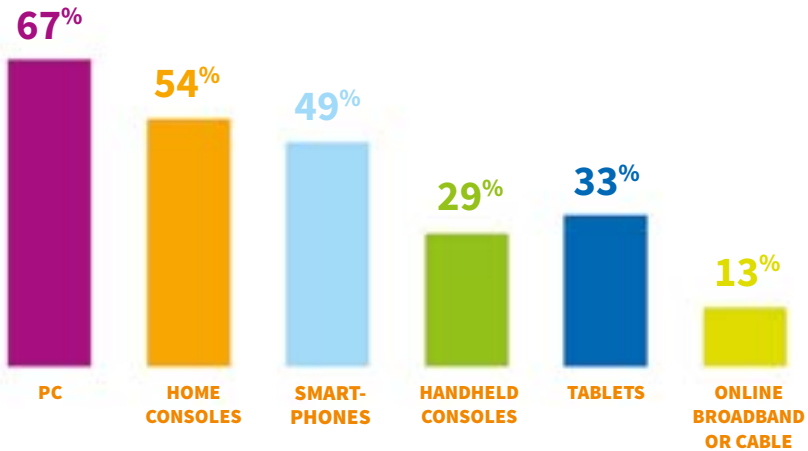
## PERCENTAGE OF GAMERS BY AGE GROUP



## HOW PEOPLE PLAY

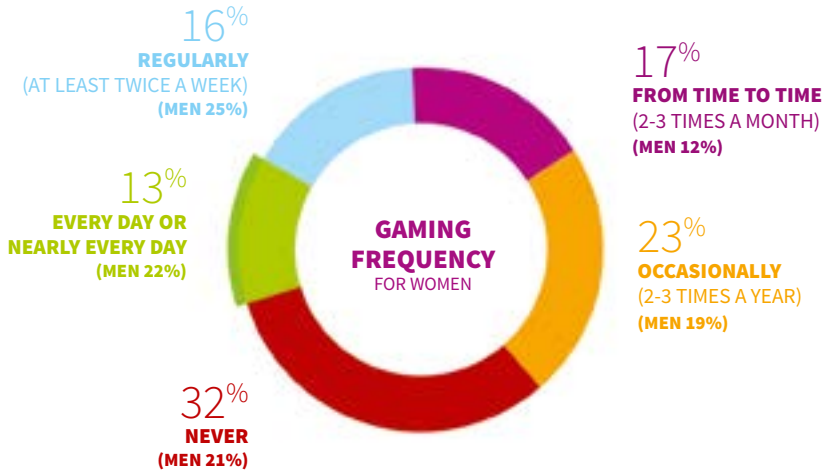


## BREAKDOWN OF GAMERS BY PLATFORM

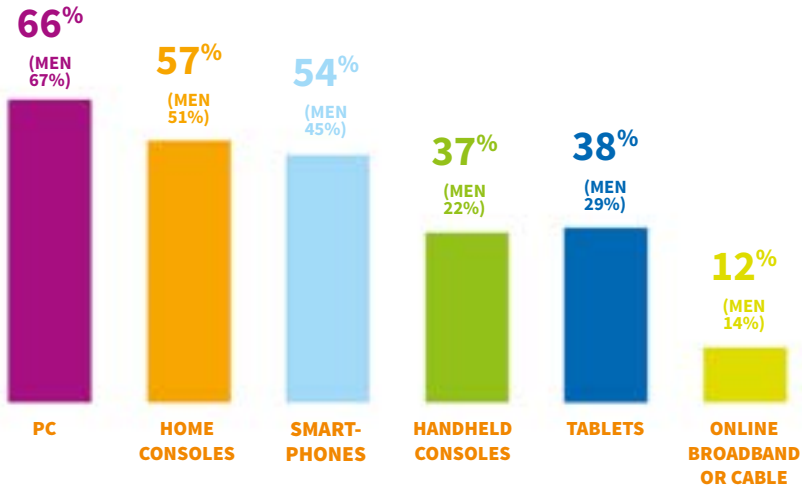


Sources: SELL / GfK "French public and Video gaming" survey of 1,002 people aged between 10 and 65 / October 2015

# Women & video games

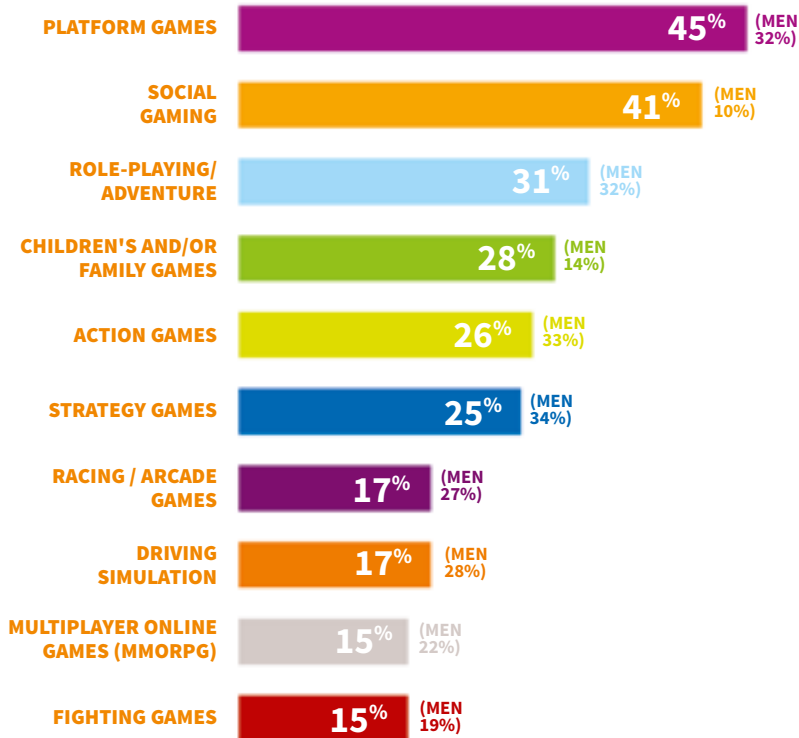


## ON WHAT PLATFORMS DO THEY PLAY?



# Top 10 women's game genres

## BREAKDOWN OF WOMEN GAMERS BY GAME TYPE



Sources: SELL / GfK "French public and Video gaming" survey of 1,002 people aged between 10 and 65 / October 2015

# Streaming

**1/3**

1 out of 3 French people  
**IS INTERESTED IN  
ESPORTS**

**9%**  
**ARE HEAVILY  
INVOLVED IN  
THE SUBJECT**

**21%**

of French people watch  
clips or videos of live  
gaming

**4%**  
**WATCH  
REGULARLY**

**16%**

of French people watch  
eSport competitions  
on the web  
(Counter Strike,  
Starcraft, League of Legend  
tournaments, etc.)

**4%**  
**WATCH  
REGULARLY**

**12%**

of French people upload  
videos of their  
gaming on line  
(using the Share button)

**2%**  
**DO IT  
REGULARLY**

**31%**

of French people watch clips  
or videos of gaming online,  
uploaded by other gamers

**10%**  
**WATCH  
REGULARLY**

dailymotion

YouTube

twitch

...

# A career in video games



## BREAKDOWN OF MEN / WOMEN OPEN TO THE IDEA OF A CAREER IN THE VIDEO GAME INDUSTRY

**43%**  
OF WOMEN

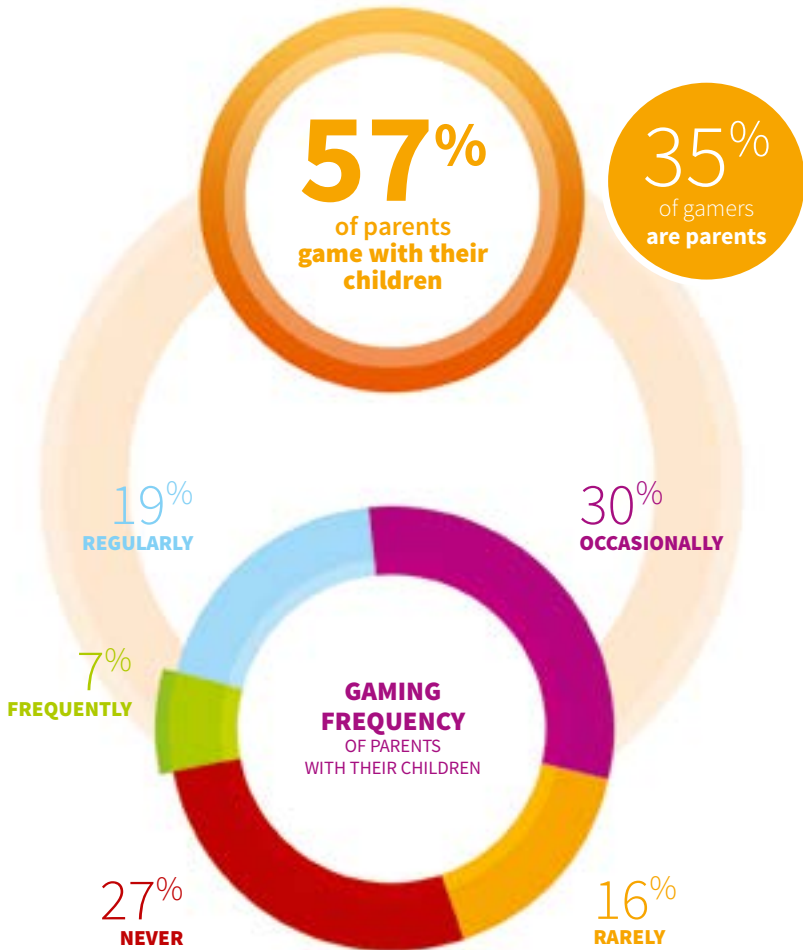


**57%**  
OF MEN





# Parents game with their children



Sources: SELL / GFK "French public and Video gaming" survey of 1,002 people aged between 10 and 65 / October 2015

# Why do parents game with their children?

**55%**

it is an opportunity to  
**DO SOMETHING  
TOGETHER**

**43%**

because the parent  
**LIKES GAMING**

**29%**  
**FOR FUN**

**42%**

because the child  
**ASKS THEM TO**

**25%**

because it means they  
**CAN CHECK THE  
CONTENT**

# Are parents interested and careful?

**91%**

**ARE CAREFUL**

about what their  
children play

**80%**

give their  
**PERMISSION  
PRIOR TO THE  
PURCHASE**  
of a video game

**45%**

use  
**PARENTAL  
CONTROL**

**80%**

of parents  
**CONTROL THEIR  
CHILD'S PLAYING  
TIME**

# PédaGoJeux.fr

## The website for information and raising awareness about video games



*The PédaGoJeux website guides parents and educators through the complex world of video gaming.*

On [pedagojeux.fr](http://pedagojeux.fr), parents can find all the best practices and keys to understanding how to best support their children in this leisure activity.

Questions about gaming time, sleep, age and game content are major concerns for adults today. PédaGoJeux believes it is essential that parents know and understand the PEGI labels so they can select games suitable to their child's age and sensitivity and adapted to their family values. In the opinion of PédaGoJeux, talking to their children about their gaming experiences and gaming together as a family are also essential.



To extend its scope, PédaGoJeux has been developing a network of educational mediators since 2014, the PédaGoJeux Ambassadors, for the most

part state or charity entities working in the fields of family awareness and information. In 2014, this programme received the "Défenseur des droits" label dedicated to the 25th anniversary of the Convention on the Rights of the Child.



In 2015, PédaGoJeux focused more specifically on younger gamers and created PédaGoJeux

Junior, a space with content dedicated to 6-12 year olds. With Tralalere, Internet Sans Crainte and SELL, two of its founding members, PédaGoJeux is involved in the launch of GameCode, a video game design app for 9-14 year-olds. It encourages them to move from consumer to designer and gives them the resources to take a step back from their gaming and view the game itself more critically. With GameCode, children will see behind the scenes of how a video game is made and discover programming, developing their digital knowledge and culture.

**PédaGoJeux is a collective created in 2008 by people from public bodies, the gaming industry and associations. The current active members of the PédaGoJeux collective are: the National Union of Family Associations (UNAF), Fear-Free Internet, the Ministry for Family Affairs, Union of Video Game Publishers (SELL), Bayard Jeunesse and JeuxOnLine. The multi-representational organisation of PédaGoJeux ensures a balanced approach to video gaming. With no demonisation and no rose-tinted views, our objective is to present the benefits and advantages of video gaming and the points of concern.**

# PEGI: Pan European Game Information

## A responsible industry



*Founded in 2003, the PEGI system is used in 38 countries, federates 1,000 companies and has endorsed over 24,000 games since its creation.*

*PEGI is continuing to provide information for gamers. To achieve this, retail professionals are an essential link in raising the awareness of gamers and their parents. Within this context, PEGI has recently launched an e-learning programme in France for retailers. Jennifer Wacrenier, PEGI's Head of Communication, presents the programme.*

### **You are launching a programme called PEGI e-learning for French retailers. What is it exactly?**

PEGI is offering a new training course for people who work in shops that sell video games. It's an e-learning tool, an online course about the PEGI system, the ratings, what they mean and the legal context for selling games in France. This e-learning course for retailers has been developed on a European scale. It is currently being rolled out in different countries with translated modules and information adapted to the national regulatory frameworks.

The objective is to provide interactive training accessible via PC, smartphone or tablet. The lesson includes information, visuals and animations about the PEGI system, ratings and their criteria, the links between the age logos and the content descriptors, content types, PEGI rules and also national laws. The module lasts approximately 30 minutes.

### **What are the advantages for retailers?**

There are many advantages because this programme means employees are fully trained and understand the PEGI ratings and local laws about age classification and child protection. They will have more information to answer consumer questions. Subscribing to this training demonstrates a company's sense of responsibility.

The e-learning course will earn the store a PEGI certificate as well as individual certificates for the employees. The training is free, quick and easy to access.

### **What is in the e-learning course?**

The training course has 4 modules:

- **PEGI description:** age categories and content descriptors, statistics, detailed criteria and content types
- **PEGI in retail:** the logos, packaging, how to deal with consumer questions and manage complaints
- **The principles behind PEGI and national legislation:** the European situation, national laws and French retail guidelines
- **A test,** which will earn the participant his or her PEGI training certificate.

### **PEGI CONTACT**

**Jennifer Wacrenier**  
**Communications Manager**  
**jennifer.wacrenier@pegi.eu**

The PEGI age rating system (Pan-European Game Information) gives parents throughout Europe the opportunity to make enlightened decisions before purchasing a video game.

Launched in spring 2003, it has replaced a certain number of national age ratings through a unique system that is now used in most European countries. The system enjoys the support of the leading console manufacturers, including Sony, Microsoft and Nintendo, and also interactive game publishers and developers throughout Europe. From this year, it is also applied to all new apps available from Google Play.

The age rating system was created by the ISFE - the Interactive Software Federation of Europe.



## WHAT DO THE LABELS MEAN?

The PEGI labels appear on the front and back of the packaging, indicating one of the following age ratings: 3, 7, 12, 16 and 18. They provide a **reliable indication of the suitability of the game's content with regard to the protection of minors.**

The age rating does not take into account the difficulty of the game or the skills required to play it. The labels below appear on the back of the packaging, indicating the main reasons why a game has a specific age rating.



This game contains bad language.



This game contains violent scenes.



This game contains images which may encourage discrimination.



This game may frighten young children.



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



This game encourages and/or teaches gambling.



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

# GameCode: a game design app for 9-14 year-olds



*With GameCode, children are introduced to programming and discover the secrets behind the making of video games, creating their own games. The app will be launched at Paris Games Week Junior 2015 with workshops organised by Tralalere at the PédagoJeux space and will also be free to download from [www.code-decode.net](http://www.code-decode.net).*

## CODING WITH GAMECODE: DECODING THE DIGITAL WORLD

GameCode takes 9-14 year-olds behind the scenes on the making of video games and also introduces the notions of programming. GameCode helps children create their own games whilst developing their digital knowledge. The application proposes:



Building a video game world step-by-step: scenery, platforms, characters, bonuses



Defining the Level Design, the difficulty and gaming level



Setting up / programming behaviour, characters and bonuses



Discovering during the course of the app the logic of game design and the mechanics of game play



Handling blocks of code using a code library

Writing lines of code (simplified JavaScript)



# GameCode: a game design app for 9-14 year-olds

## TWO WAYS OF USING THE APP

**1**

### GUIDED TOUR

ACCOMPANYING CHILDREN,  
STEP BY STEP,  
IN HOW TO MAKE  
A PLATFORM GAME

**2**

### FREE USE

CREATING THEIR  
OWN GAME BY  
EXPERIMENTING,  
WITH NO GUIDANCE.

## A TOOL TO HELP TEACHERS AND MEDIATORS

You don't need to be an IT genius to use GameCode! The app is designed to be used at school and within the scope of school activities. No IT expertise is required at all. GameCode has a guided tour and a complete teacher booklet (info sheets, assessments, class / group management tools) which make for easy implementation of coding workshops and video gaming activities

GameCode is a Tralalere production created in partnership with PédaGoJeux, with the support of the Union of Video Game Publishers (SELL) and the European Union. The app also has the support of the Caisse des Dépôts within the framework of the Projets d'Investissement d'Avenir (Future Investment Projects).



GAME  
CODE\_

# Chapter 4

## Paris Games Week





**For this 6th edition, Paris Games Week is even bigger with over 60,000 m<sup>2</sup> of space offering everyone, gamers and their families, the most fabulous, fun and immersive experience. These 5 days put our trade fair at the centre of the video gaming universe, offering an even richer programme with an international scope.**

We want to make Paris Games Week the showcase for video games in every form. Publishers, who are many this year, will reveal their new products for the end of year season and will be showcasing 2016 releases to the delight of all gamers, often as exclusive premieres. This year we have also increased the number of invitations to bring together studios, charities and communities around manufacturers, publishers and accessory manufacturers.

Together, they make up the rich fabric of our industry and ensure its formidable vitality in France. Paris Games Week will federate them all as we celebrate gaming culture over 5 days.

Finally, Paris Games Week 2015 is also a forum for discussions, meetings and sharing information about video games.

Our many partners will be attending, on inform visitors and raise their awareness to certain issues.

In this way, the trade fair is a clear reflection of our industry's desire to be responsible and support gamers and their families in their gaming.

### **Emmanuel Martin**

General Delegate of SELL

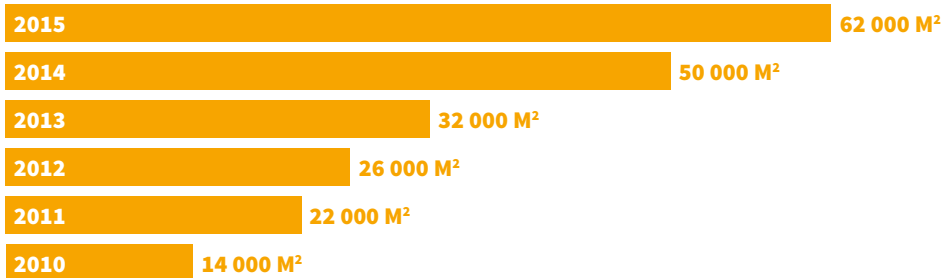
# Paris Games Week in figures

Top 5 international video game events.  
Top 5 French trade fairs.

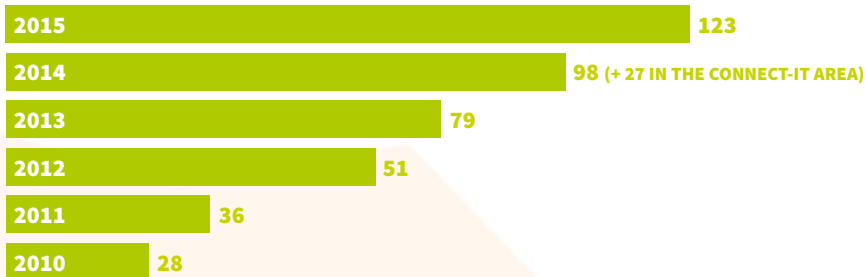
## GROWTH IN NUMBER OF VISITORS



## GROWTH IN SIZE



## GROWTH IN NUMBER OF EXHIBITORS





# Chapter 5

# SELL

# The missions of SELL

SELL stands for the Syndicat des Editeurs de Logiciels de Loisirs, or the Union of Video Game Publishers.

**Created in 1995, SELL is France's national organisation representing video games publishers and software manufacturers.** Today it has around thirty members representing over 95% of the sector's turnover, according to the GfK panel.

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

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

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

The European trade fair:  
**IDEF** – [www.idefexpo.com](http://www.idefexpo.com)

The general public exhibition:  
**PARIS GAMES WEEK**  
[www.parisgamesweek.com](http://www.parisgamesweek.com)  
(272,000 visitors in 2014)

## Professionals

Research - Information  
Public relations  
IDEF

## Public authorities

Government  
Institutions  
European Union



## Public

PEGI - PEDAGOJEUX  
Fighting piracy

## Gamers

Paris Games Week  
Information - News -  
Prevention

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Square Enix  
Take-Two Interactive  
Ubisoft  
Warner Bros Interactive





### **About the GfK Group**

GfK provides reference information about markets and consumer behaviour.

Over 13,000 market survey experts combine their passion with 80 years of experience in data analysis. With its global vision, GfK provides local insight to over 100 countries.

Using innovative technologies and the latest in market analysis, GfK transforms Big Data into Smart Data, enabling its customers to improve their competitive edge and enrich consumer experiences and choices. To find out more, visit [www.gfk.com/fr](http://www.gfk.com/fr) and follow us on [twitter.com/GfK\\_en](https://twitter.com/GfK_en)

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For this survey, a panel of 1,002 people aged 10 to 65 were interviewed in October 2015.



[WWW.SELL.FR](http://WWW.SELL.FR)

Jean-Claude **Ghinozzi**  
Chairman

Emmanuel **Martin**  
General Delegate  
[e.martin@sell.fr](mailto:e.martin@sell.fr)

Anne Sophie **Montadier**  
Communication and Press Relations Manager  
[as.montadier@sell.fr](mailto:as.montadier@sell.fr)