

2019

ANNUAL REPORT



"Our ambition is to bring together all the great initiatives that help recognise and promote video gaming."



DEAR MEMBERS,

The tempo for 2019 was set by the many projects that promoted the rich fabric of video

gaming, the many talented people in the industry but first and foremost the gamers. This was translated by the heavy involvement of SELL in content production, event organisation and investments in community initiatives.

Last year, we wanted to spotlight the different stages of creating a video game and its relationship with art through a series of documentaries: "Art & Video games" and "Game in Progress". This year, we are giving a voice to gamers through a series of portraits entitled "Player Profile". These short videos tackle the connection between the passion for gaming and other leisure activities like painting, sport and fashion.

These passionate fans came together for Paris Games Week which welcomed some 317,000 visitors. The event that celebrated its 10th edition closed its doors with a new visitor record. PGW is a reflection of the passion that drives us and enables visitors to witness the industry's many facets. A great many products for the festive season and 2020 previews were tested.

Paris Games Week pursued its investment to encourage everyone to take part in the event, optimising its accessibility. Our ambition is to bring together all the great initiatives that help recognise and promote video gaming.

We support these initiatives at PGW and also throughout the year with many projects about important society issues. Our industry's responsibility has always been a driving force for SELL, through the recognition of PEGI and our many commitments, too. Today, SELL is involved in optimising accessibility in gaming with CapGame, developing intergenerational connections through video games with Silver Geek, promoting and improving sexual equality in our sector alongside Women in Games and, finally, through the PèdaGoJeux collective, raising parent awareness about children's leisure activities.

I would like to thank Franck Riester, the Minister for Culture, for awarding me a Knighthood from the Order of Arts and Literature. I'm extremely honoured to have received this award. I see it as important recognition for our sector and the women who have contributed to it.

This year again, SELL members have demonstrated their keen motivation for our vocation. Thanks to all of you for your contribution and commitment.

JULIE CHALMETTE
SELL CHAIRWOMAN

"The wide presence of video games in homes incites concerns but also opportunities for sharing."



DEAR MEMBERS,

2019 was full of projects and challenges for the video game

sector. With a market representing over 4.8 billion euros in France, video gaming confirms its role in the life of French people, 49% of whom play regularly. This wide presence in homes incites concerns and also opportunities for sharing.

Video gaming is an excellent media for circulating stories and discovering new worlds. It is also an opportunity for families to share time together and create new connections. This year, SELL wanted to raise awareness about how important these play times are through a campaign for parents called "Good gaming, good memories". Its focuses are promoting PEGI, game time and parental controls.

The intergenerational connection created through video gaming is something that SELL is developing with Silver Geek. This organisation wants to build social connections by helping seniors in care homes discover video games. Workshops were set up by young people on civilian military service, helping build connections between the generations. This programme also includes a competition with the organisation of eSport tournaments between care homes all over France. To help the organisation roll-out its project nationally, SELL signed a partnership

agreement with Silver Geek that will promote access to digital technology for seniors and also develop their use of eSport as a leisure activity.

eSport was also a very popular topic in 2019 with the ever-increasing involvement of political decision-makers and organisations. With the presentation of the government's 2020-2025 eSport strategy, backed by both Cédric O and Roxana Maracineanu, the sector and France Esports in particular have become even more established. With its targets and missions, this roadmap gives the organisation all it needs to help the government make eSport an attractive feather in France's cap.

The interest the public authorities and elected officials have for our sector is demonstrated by its recognition. Franck Riester, the Minister for Culture, awarded Julie Chalmette a Knighthood from the Order of Arts and Literature for her commitment to video games, culture and diversity. Through our Chairwoman, it is our entire creative industry that is recognised for its talent and work.

The SELL team would like to congratulate Julie Chalmette once again for her hard work for SELL over the last three years, focusing our actions on promoting a responsible industry, the gamers and highlighting the sector's talented people.

EMMANUEL MARTIN
GENERAL DELEGATE OF SELL



CONTENTS

SELL	5
About us	5
Members	6
The board of directors	7
Our missions	8
Our partners	10
High points in 2019	12
Representing video game editors	14
Public affairs	14
The structure of eSport	20
Informing, protecting and supporting initiatives	22
Informing and protecting	22
Safeguarding video games	24
Supporting inclusion	26
Promoting video games	28
Paris Games Week 2019	28
Key figures	30
IDEF 2019	32
Creating benchmark content	34
A cultural and artistic dimension: video games and talent	36
SELL in the media	38
Structuring market information	40
Market figures	40
French people and video games	41
Union life	42

SELL WHO WE ARE

The Union of Video Game Publishers is a professional organisation made up of businesses from the video game sector specialised in publishing. With 23 members, 20 publishers and three associate members, SELL is the spokesperson for video game businesses in contact with gamers, families, politicians, organisations and the media.

Publishers are specialists in video game promotion. They find and support talented studios and provide the distribution, marketing and advertising resources for what they create. SELL's vocation is to federate these partners and encourage their work on agreed actions, expressing the richness, creativity and responsibilities of this industry. Its main missions are to promote video gaming and raise awareness of gamers and their families about best practices, so they can enjoy gaming with peace of mind.

SINCE 1995, EVERY YEAR
THE UNION WORKS AND INCREASES
ITS ACTIONS IN LINE
WITH THE SECTOR'S
DYNAMIC DEVELOPMENTS



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The Board of Directors would like to thank Hugues Ouvrard for his hard work.



OUR MISSIONS

REPRESENTING THE PUBLISHING INDUSTRY

As an industry spokesperson, SELL's primary vocation is to defend the interests of its members and, more generally, the entire video game sector. It is the key contact with public authorities, politicians and also innovative and cultural ecosystems.

To achieve this, SELL is involved with several organisations and working groups:

- Inter-ministerial working group made up of the General Directorate for Enterprise (DGE), the CNC, 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;
- Industry monitoring committee;
- Strategic guidance for the National Digital Council;
- France Esports – Secretary General and member of the Board of Directors.



INFORMING, PROTECTING AND SUPPORTING RESPONSIBLE INITIATIVES

Since its beginnings, SELL has been committed to a corporate social responsibility initiative to inform and protect the consumer. 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;
- Supporting organisations working on responsible inclusion: Women in Games to promote diversity, CapGame to develop accessibility and Silver Geek for intergenerational connection.

PROMOTING VIDEO GAMES

SELL's mission is to promote video gaming, the industry's innovations and creativity with the general public, national and European stakeholders and also the media, through various messages and statements and also two annual benchmark 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.



STRUCTURING MARKET INFORMATION

SELL works with partners to provide the whole ecosystem with reliable studies on the video game market, gamer profiles and also gamer purchasing 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;
- Annie App panel (mobile) – ISFE;
- Other surveys: "French people and video games" – SELL/Médiamétrie.



OUR PARTNERS

Every day, SELL works with many partners to promote video game development. It is an ex officio member of the Board of Directors of the Interactive Software Federation of Europe (ISFE), chaired by Olaf Coenen (Electronic Arts). Within this European federation, SELL regularly networks with its European counterparts.

SELL is also a member of the international Global Working Group, which brings together unions from the video game industry around the world.

SELL works with local organisations, in particular PédaGoJeux, CapGame, Silver Geek and Women in Games as well as the National Video Game Union (SNJV) and the regional business cluster Capital Games.

OUR NATIONAL PARTNERS



OUR INTERNATIONAL PARTNERS



OUR MEMBERSHIPS AND MANDATES





HIGH POINTS IN 2019

> A new advertising campaign: "Good gaming, good memories"

To help parents with the fast-approaching festive season, SELL launched a new information and awareness campaign to give them the necessary information for worry-free video gaming at home.

This campaign called "Good gaming, good memories" was on television, in the press and online from 15th November to 15th December. For the first time, it covered all the tools and best practices in video gaming, from compliance with PEGI labelling to gaming supervision and activating parental controls.

> Partnership between SELL and Silver Geek

Silver Geek is an organisation promoting access to digital technology for seniors, limiting their isolation by developing social and intergenerational connections.

Young people in civilian military service have been running workshops on video games in care homes. After an initial year of collaboration, SELL wanted to be more involved with Silver Geek and signed a partnership to help the organisation roll-out its actions on a national scale.



The Minister for Culture Franck Riester awarded Julie Chalmette, Chairwoman of SELL, a Knighthood from the Order of Arts and Literature.

> Julie Chalmette receives a Knighthood from the Order of Arts and Literature

On the preview evening for the 10th edition of Paris Games Week, the Minister for Culture Franck Riester awarded Julie Chalmette, Chairwoman of SELL, a Knighthood from the Order of Arts and Literature.

This honorary French award recognises people who through their creativity have made significant contributions to the arts or literature, or have helped propagate the fields of arts or literature in France and around the world. Franck Riester who came to the exhibition to give the award, wanted to celebrate Julie's investment and commitment to video gaming, culture and diversity. He said: "Through Julie, this recognises the high-standards of this creative industry and celebrates all the talented people that bring video games to life."

> 2020-2025 roadmap for eSport

After the eSport Conference which took place in the first half of 2019, the government presented the 2020-2025 eSport strategy at the preview evening of Paris Games Week. Backed by both Cédric O, the Secretary of State for Digital Business, and Roxana Maracineanu, the Minister for Sport, this inter-ministerial roadmap promotes the actions of France Esports, legitimising the organisation and setting clear objectives to increase eSport development in France. Like, for example, support for creating an eSport training sector or promoting the appeal of France and its eSport ecosystem.



PUBLIC AFFAIRS

AS WELL AS A BUSY TIME FOR THE FRENCH PARLIAMENT, FOR SELL 2019 WAS MARKED BY MANY INITIATIVES FOCUSED ON CHALLENGES THAT REPRESENT PREVENTION AND PROTECTION OF YOUNG GAMERS.



Speech by Cédric O, Secretary of State for Digital Business, during PGW.

SELL ran a huge campaign promoting the CIJV (video game tax credit) to safeguard its conditions.

Budget preparation in 2019 heard key announcements from the government about cutting tax breaks and different tax credits. **The risk of an attack on the CIJV had been anticipated by SELL** which had launched an upstream assessment of this tax credit to demonstrate its effectiveness and positive impact on businesses and jobs.

This assessment measures the effects of the CIJV between 2014 and 2018, in particular demonstrating the impacts of the reform in 2016. It illustrates the CIJV's very positive effects on the French economy as over five years it helped create 3,100 jobs and 270 M€ of added value. The CIJV also had a positive impact on the government's revenue; one euro invested in the video game tax credit generates up to €5.30 in tax revenue. The CIJV benefits the whole nation, in particular enabling the development

of many studios all over France. The CIJV also turned out to be an important draw for international businesses which invested more heavily in French production studios. This assessment compared different and similar tax credits elsewhere in the world, demonstrating international competition in this field.

It was shared with all stakeholders working on the Finance Bill for 2020 (parliamentarians, public administration, ministerial cabinets, etc.).

SELL met with key people working on the Finance Bill, in particular Bertrand Sirven, Assistant Director of the Cabinet of Bruno Le Maire (Minister of the Economy and Finance), to raise their awareness about the necessity of keeping the tax credit. Meetings with the most involved parliamentarians were also organised, which helped forestall the government's wish to criticise the video game tax credit. Unfortunately, these efforts did not prevent several of them rolling out initiatives for reform.

The general budget rapporteur at the French National Assembly, Joël Giraud, wanted to implement limitations on the tax credit as of 31st December 2022. This amendment was initially adopted by the Finance Commission before SELL was able to ensure its withdrawal during a public session. So the video game tax credit has been saved from any limitations this year.

Furthermore, the general budget rapporteur adopted an amendment to set up an annual assessment of all tax credits managed by the CNC, including the video game tax credit. This assessment report should in particular analyse the impact of the CIJV on France's appeal as a nation and the direct and indirect business it generates. It should also provide recommendations to limit the cost of the CIJV if it should increase.

Finally, Céline Calvez wanted to make the video game tax credit dependent on diversity. The member of parliament explained that this amendment was only an appeal amendment to question the role that tax credits can play in reducing inequality before withdrawing the amendment. The subject should be discussed again within the framework of the 2021 Finance Bill.

SELL's actions upstream and during this Finance Bill meant that only the amendment requesting a report from the CNC on the use of tax credits was adopted, the others being either withdrawn or rejected. However, it is important to follow the work that will take place throughout 2020 to influence the assessment of the video game tax credit and the directions that may be explored and avoid any conditioning of the CIJV that would damage the industry.



The video game alliance for the environment.

The increase in environmental questions about digital technology

In a Cabinet meeting on 10th July 2019, the French government adopted the draft bill to fight waste and promote the circular economy.



This draft bill initially had four major chapters:

1. Consumer information;
2. Fighting waste;
3. Reinforcing manufacturer responsibility;
4. Transposition of directives.

During the debates, the Senate considerably broadened the field of the text to cover in particular the question of digital technology and planned obsolescence, where the text initially covered the sectors of furnishings, textiles, construction and the challenges of plastic packaging.

After examination, the National Assembly also significantly modified and added to this text. Included in these modifications:

- The obligation for any product from the EPR industries sold on the market for household use to have the Triman symbol, as of 1st January 2021;
 - For electric and electronic equipment, an extension of the requirement to inform the consumer about the availability or non-availability of spare parts, as of 1st January 2021;
 - The obligation for manufacturers or importers of electric and electronic equipment to display, with no cost to the seller, the reparability score for the equipment and the parameters that helped determine said score, as of 1st January 2021;
 - The ban on making the repair or reconditioning of a device impossible outside of authorised channels;
 - The obligation for manufacturers, importers and distributors of new non-food products to re-use or recycle their unsold products, from 31st December 2021 for products subject to EPR and from 31st December 2023 for others.
- SELL followed all the stages of this text so it could warn its members as early as possible

about any new obligations that could impact the future of video game publishers.

The Senate also examined the text, announcing the creation of a fact-finding commission on the environmental impact of digital technology. In early 2020, SELL will present the measures the industry has taken to demonstrate how motivated it is in this challenging field and also the measures that could be proposed by the Senate to effectively reduce the environmental impact of video games.



Franck Riester tests a VR headset at PGW.

SELL anticipated the debates on the audiovisual draft bill by working on the preliminary draft bill and, in particular, the transposition of the directive about copyright.

The draft bill on audiovisual communication and cultural sovereignty in the digital era was adopted in a Cabinet meeting on Thursday 5th December 2019. It proposes the transposition of part of the directive on copyright and related rights in the unique digital market. When the administration was writing the draft bill, SELL actively worked with the legal departments of the Ministry for Culture and

more particularly with its General Secretariat, to better understand the bill's content, the directions chosen by the government and try to influence this reaction, taking into account the content of the directive on copyright and the problems encountered by its translation into French. Even if this did not help with the writing of the bill, the issues were nevertheless better understood by the people writing it, in an attempt to try and move the situation forward with the parliamentarians involved.

At the National Assembly, Aurore Bergé (LREM, Yvelines) was appointed general rapporteur for the audiovisual draft bill, responsible for the organisation and transposition of the SMA directive.

Two other rapporteurs were appointed:

- Sophie Mette (Modem, Gironde), responsible for the transposition of the directive on copyright and the fight against piracy;
 - Béatrice Piron (LREM, Yvelines), responsible for public service broadcasting.
- Rapporteurs for notices from other commissions were also appointed:
- Éric Bothorel (LREM, Côtes-d'Armor) will be the rapporteur representing the Economic Affairs Commission;
 - Jean-François Portarrieu (LREM, Haute-Garonne) was appointed rapporteur representing the Foreign Affairs Commission;
 - Christine Hennion (LREM, Hauts-de-Seine) was appointed observation rapporteur for the audiovisual draft bill.

For the Senate, the appointment has not been made official, but Jean-Pierre Leleux (LR, Alpes-Maritimes) should be appointed rapporteur. In preparation for the National Assembly debates, SELL has requested meetings with key parliamentarians to discuss this text and video gaming issues.



Franck Riester, Audrey Leprince and Julie Chalmette at PGW.

The 10th edition of Paris Games Week was marked by institutional recognition for the industry, those involved and SELL's chairwoman

From 30th October to 3rd November 2019, the 10th edition of Paris Games Week (PGW) brought together 317,000 visitors over the exhibition's five days. At PGW, video gaming is showcased as a real societal phenomenon: a reputed and popular pastime. eSport, innovations, culture, responsible gaming, inclusiveness...all these elements made the 2019 edition a genuine success with everyone sharing this celebration of video gaming.

There were several institutional visits and events at 2019's Paris Games Week. The event was attended by Sophie Cluzel, Secretary of State for the Prime Minister responsible for People with Disabilities, and Cédric O, Secretary of State for Digital Business, for the Economy and Finance Minister and the Budget Minister, who spoke at the eSport Summit before a long tour of the exhibition and its booths.

Adrien Taquet, Secretary of State for Child Protection for the Minister for Solidarity and Public Health, chatted with many families, both parents and children, about video gaming and screen time.



Denis Masségla, member of parliament for Maine-et-Loire and Chairman of the National Assembly's video game study group, accompanied several parliamentary delegations to reinforce discussions between professionals, gamers and legislators.

Paris Games Week also received a visit from the new chairman of the National Cinema Centre (CNC) Dominique Boutonnat, who came to learn more about the video game sector and all those involved with the creative side of the industry. Finally, the visitor that most thrilled the exhibition this year was Franck Riester, Minister for Culture, who came to award Julie Chalmette with a Knighthood from the Order of Arts and Literature. Mr Riester explained that *"this Knighthood from the Order of Arts and Literature recognises Julie Chalmette's struggles and all those who share them with her. The struggle for video gaming, the cultural struggle, the struggle for equality between men and women and finally, the fight for diversity. Through Julie, this recognises the high-standards of this creative industry and celebrates all the talented people that bring video games to life"*.

Launch of a new awareness campaign about PEGI symbols as the government and the administration ramp up their actions about children and screen time

SELL launched an extensive awareness drive about protecting young audiences when they play video games through a campaign promoting PEGI and parental controls. This campaign should help everyone understand that there is an audience for every game and a game for every audience.

Operating through different media channels with the ambition of reaching the greatest number of people, the campaign has a positive message, showing moments of bonding and sharing



Poster for the "Good gaming, good memories" campaign.

created by playing video games. It highlights the importance of reduced gaming times, the need to choose games adapted to the child's age and promotes the use of parental controls. By learning about video gaming, we understand which boundaries not to break and which rules to lay down. We create moments when the family can bond together. The campaign was very well-received and was supported by several important public institutions. In parallel, for the 30th anniversary of the International Convention on the Rights of the Child, France's President Emmanuel Macron made a speech at UNESCO during which he lengthily covered the issue of protecting children in the digital arena.

To achieve this, he is planning on giving parents more control of children's use of digital technology with the implementation of parental controls that are by default, instead of voluntary. This obligation, still vague at this time, should concern internet access providers and operating systems. If internet providers do not propose a solid solution to the issue, he will propose a law that imposes mandatory parental controls. Furthermore, France's President believes that simply declaring your age is not enough to prohibit access to pornographic content for minors under 15 years old. His ambition is to generalise age checking resources for pornographic sites. These announcements follow an initiative already launched by the Secretary of State for Child Protection, Adrien Taquet, with a view to signing a protocol for the prevention of exposure to pornographic content for minors. In application of this protocol, telephone operators and internet access providers are improving information for parents about

parental control resources and making said resources easier to use. In association with all those involved and in particular telecoms operators, smart operating system providers and the CSA, awareness campaigns about parental control resources will be organised. Furthermore, a single platform grouping together all the information about the different existing parental control systems will be made available to the public by the end of the first half of 2020. A practice committee was set up at the end of 2019 to precisely measure the threat, the availability of parental control systems and the progress made over a year. Regular tracking should help assess the effectiveness of the measures taken with all involved and if said measures are insufficient, in autumn 2020 a legal obligation for default parental control will be introduced on all mobile phones and tablets sold in France.



Adrien Taquet, Secretary of State for Child Protection, answers questions from parents about video gaming at PGW.



Presentation of the government's eSport strategy with France Esports.

THE STRUCTURE OF ESPORT IN FRANCE

More support from the government to encourage this sector's development

The eSport Conference was organised jointly by the General Directorate for Enterprise (DGE), the Directorate for Sport (DSS) and France Esports and involved a series of consultative workshops. These workshops run by Chloé Borie, policy officer for the Ministry for Industry, brought together a wide range of businesses and organisations from the French eSport sector.

The workshop themes prepared in collaboration with France Esports were as follows: national and local structure, inclusiveness, training and the status of professional players; business development and innovation; appeal of the industry and the organisation of major international events.

The eSport Conference helped the government prioritise its actions to support the needs of this constantly changing industry with in particular the formulation of a roadmap with the ambition of making France the European leader in the eSports sector by 2025. The strategy focuses around four key directions:

- Promoting the development of responsible and social eSports;
- Supporting the creation of a training sector with a particular focus on high-level players;
- Implementing a support policy to help French people develop in eSports;
- Promoting the appeal of France and its eSport ecosystem.

France is lucky to have a pool of high-level eSport gamers who excel at international competitions.

Our country can also count on the commitment and support of sector professionals, both private and public, federated around France Esports, the collegial model of which inspires other ecosystems around the world.

Growing parliamentary concern about eSport

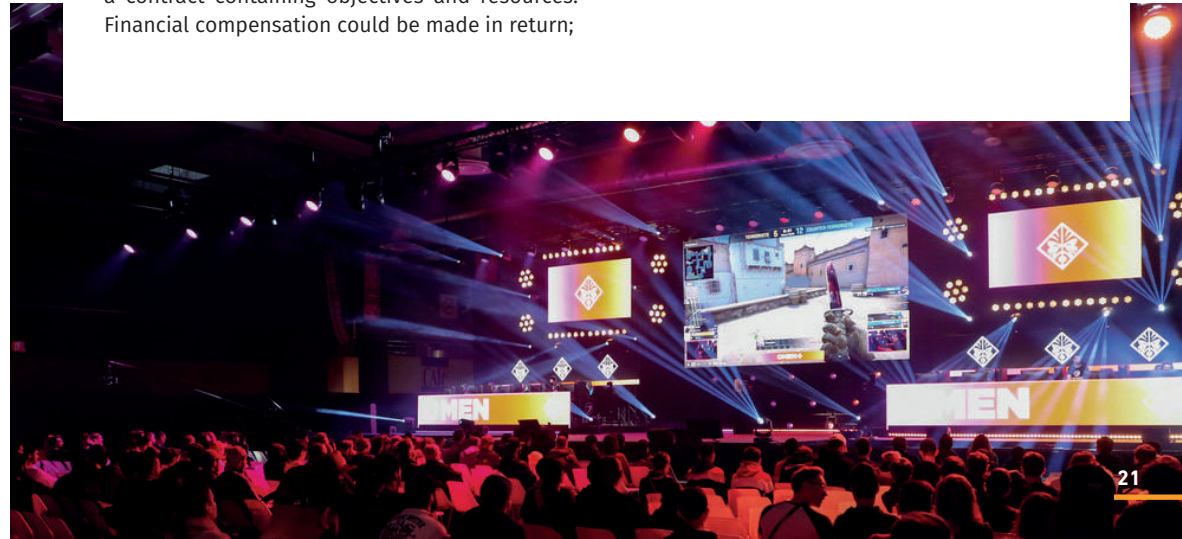
In July 2019, Denis Masségla presented the findings of a parliamentary working group on eSport. Through its general delegate, SELL was involved in this working group.

On this occasion, Mr Masségla underlined the difficulty France has in terms of its attractiveness: the employment conditions most interesting for gamers are in other countries because of tax advantages. Furthermore, French labour law is not immediately adaptable to the specific characteristics of eSport with few jobs and competition with contracts offered by other countries which are more financially rewarding and more flexible in terms of employment conditions. The report by the chairman of the working group has 16 recommendations, including:

- Setting up a ministerial department for France Esports and giving it new missions that could be public service contributions, and writing a contract containing objectives and resources. Financial compensation could be made in return;

- Introducing a better framework for training video game players through the creation of a France Esports label;
- Improving the structure of a video game competition network at an amateur level, with France Esports at its head;
- Creating a France Esports qualification for eSports events with specifications that include inclusiveness, diversity and accessibility;
- Encouraging agreements between publishers and France Esports covering intellectual property issues in amateur eSport competitions that publishers could be incited to finance;
- Reviewing the status of professional players as created by the Lemaire law which is too strict and does not allow for the requirements of professionals;
- Establishing a visa policy adapted to eSport players.

SELL met with Denis Masségla regularly as he wrote the report to move certain recommendations forward and redirect others to promote development of the sector.





INFORM AND PROTECT



The PEGI system recognised by the French government

SELL has always worked for institutional recognition of the PEGI label and to convince the public authorities of the quality and legitimacy of the regulation developed by the video game industry. On 17th December 2015, the French government officially approved PEGI; the decree establishes by law the use of the system that rates video games by age and by risk.

This approval firmly establishes the system used since 2003 by the video game sector and demonstrates that a collective and voluntary initiative taken by responsible professionals can guarantee the public stability and security. This recognition represents an historic exemplary success for video gaming.



A major awareness campaign: "Good gaming, good memories"

This year, SELL opted for a more global message about video gaming with your family. The campaign covered all the tools and best practices with three clear focus points: choose a game adapted to the age of the child thanks to the PEGI label, supervise the time spent and the actual gaming and set up parental controls. Rolled out as a television and online advert and relayed in the press, the "Good gaming, good memories" campaign was supported by the

Ministry for Economy and Finance, the Ministry for the Budget and the Ministry for Culture which granted it the official status of a general interest campaign.

Broad visibility for this campaign

The campaign was broadcast on the France Télévisions network, enjoying preferential rates because of its non-commercial nature and was rebroadcast on TF1. To reach the maximum amount of families unfamiliar with video gaming, it also appeared in *Têlêrama*, *Version Femina* and *TV Magazine* which are the two best-selling magazines in France. Online, the campaign reached over 12 million parents of children under the age of 3. Finally, retailers such as Leclerc and Fnac helped relay the campaign by promoting it on their online stores and social media.



PédagoJeux.fr

SELL is a founding member of PédagoJeux and works hard to develop it. Since 2008, this collective has had a mission to raise awareness and help people understand video gaming. PédagoJeux guides parents by providing best practices that help them better support their children when they

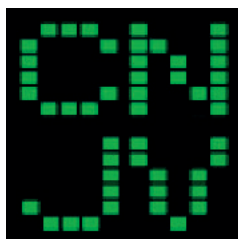
game. To extend its scope, it is developing a network of ambassadors, state or charity organisations working in the fields of family awareness and information. In 2014, this programme received the "Défenseur des droits" label dedicated to the 25th anniversary of the Convention on the Rights of the Child.



SAFEGUARDING VIDEO GAMES

Currently, video gaming is a leisure activity that is well-established in the habits of French people and has been for several years. It has travelled through the generations with different consoles and many licences and today has become a genuine mainstream phenomenon. SELL is working hard to safeguard and

share this fantastic story with the general public through several projects with different partners. The evolution of gaming has been explained in the documentary *Itinéraires du jeu vidéo* (The journey of video games) made by SELL in 2017 and available on the SELL TV YouTube channel.



National Conservatory of Video Games

The National Conservatory of Video Games (CNJV) has a mission to gather industrial and personal collections to preserve, archive and facilitate their study and promotion. Its objective is to share the developments in the video game sector in terms of technology and also creativity and design, providing access to the methods, processes and techniques that have helped create video games from the olden days of *Pong* to today's virtual reality.

{ BnF

Bibliothèque nationale de France (BnF)

The French National Library (BnF) collects, catalogues, safeguards, enriches and promotes the nation's documentary heritage. It has the largest public collection of video games with over 17,000 titles, from gaming's origins to recent releases. For two years, the BnF has taken part in PGW. At its booth, it shows how it curates video games and it also organises a day of conferences. Organised by both the BnF and SELL, in 2019 these conferences focused on the fantasy world and the game *Lie in my Heart*.



MO5.COM is a non-profit association (under French law 1901) founded on 31st January 2003 with the objective of preserving digital heritage. Thanks to a great many donations since it was first founded, MO5.COM has managed to create one of the most important digital heritage collections in Europe. The organisation presents part of this collection every year at PGW in an area dedicated to retrogaming. This booth allows parents to share their gaming memories with their children on vintage consoles and also presents the ancestors of current video games.



SUPPORTING INCLUSION

For several years now, SELL has been working to encourage inclusiveness in the video game sector and in eSport. The union has partnered several organisations to help fulfil its mission.



Women in Games: promoting diversity to increase creativity

This year has seen the launch of many projects. Women in Games sponsored a trip for three women for the GDC, organised many networking meetings and took part in lots of shows and exhibitions to present video game careers to young women. The organisation also set up an eSport incubator to offer high-potential women gamers personal coaching and launched its

Twitch channel which broadcasts interviews, game tests and other original content. Finally, Women in Games represents video gaming in the Femmes@Numérique collective and contributes to the diversity working group led by the CNC, proof of the organisation's legitimacy. SELL helped Women in Games increase its visibility with a booth at Paris Games Week where games developed by mixed teams were promoted in the Made in France zone.



SilverGEEK



Silver Geek: bringing generations together through video gaming

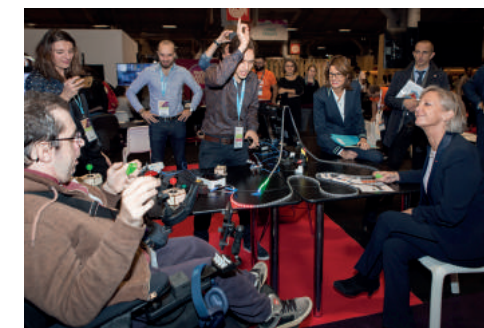
To build connections between the generations, since 2014 Silver Geek has been developing a programme that introduces seniors in care homes to new technologies and how to play video games, with help from young civilian military service volunteers. For a year, SELL and Silver Geek have been working together to promote the organisation during Paris Games Week, in particular with exhibition matches between seniors. This year, their collaboration progressed to another level with the signature of a partnership agreement to help Silver Geek roll-out its project on a national scale.



CapGame: video games accessible to everyone

Video gaming may be the leisure activity for a majority of the French population but at times it is not accessible for everyone. CapGame works to improve accessibility to gaming through five types of actions including game tests, developing software and equipment solutions, research, eSport and also support for video game professionals.

SELL decided to increase its involvement in accessibility, in particular at PGW. With the help of CapGame, many resources were rolled out to make visits easier for people with disabilities. Signing for the hearing impaired and maps in Braille were widely available throughout the exhibition.



CapGame also ran the "Play as you are" zone which hosted different organisations working to improve accessibility in the video game sector. Finally, at Paris Games Week the organisation also held the finals of the CapGames Arena, an inclusive competition on the exhibition's main stage with three games: Street Fighter V, eFootball PES 2020 and Forza Motorsport 7.



PARIS GAMES WEEK 2019

THE 10TH PARIS GAMES WEEK!

More than ever before, this 10th edition of Paris Games Week excited all the generations who came to celebrate video gaming. 317,000 visitors of all ages came to game, discover and share their passion in some 80,000 square metres of exhibition space at Paris Expo Porte de Versailles.

Whether it was testing the latest new products for the festive season, previewing some of the most keenly awaited games for 2020 or watching eSport competitions, the pleasure of gaming was shared by the different generations as never before: children, teenagers, parents and grandparents!



"We're all gamers! A stroll through the alleys at the exhibition was all you needed to understand the broad range of visitors there. The involvement and commitment of manufacturers, publishers, studios, organisations and associations have helped us enrich the exhibition's events over the years to address new audiences today. 2020 will reflect a new stage: a second decade for Paris Games Week. The industry's creative strength combined with its capacity for innovation mean we still have a great deal of surprises in store over the coming years."

Emmanuel Martin, General Delegate of SELL

PARIS GAMES WEEK 2019

THIS YEAR ONCE AGAIN, PARIS GAMES WEEK WAS A FABULOUS OPPORTUNITY TO DISCOVER ALL THE ASPECTS OF VIDEO GAMING.



PGW official store



Centre Pompidou booth



PGW Junior



Parents' lounge

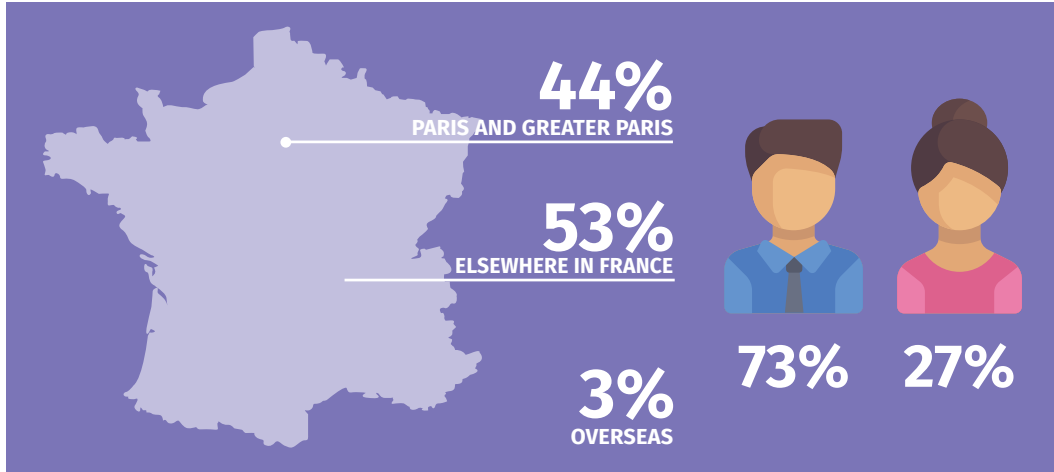


PGW Family

For 2019, hall 2.2 at PGW was renamed "PGW Family" with the development of a strong focus on sharing as a family. A family circuit guided parents and children round the main booths in this hall. A prize was given to the children taking part!

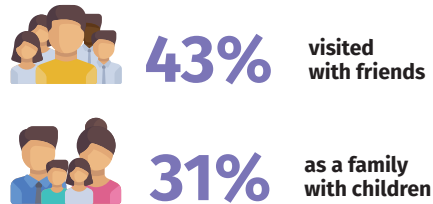


PARIS GAMES WEEK 2019 KEY FIGURES



FOCUS ON VISITS TO PGW

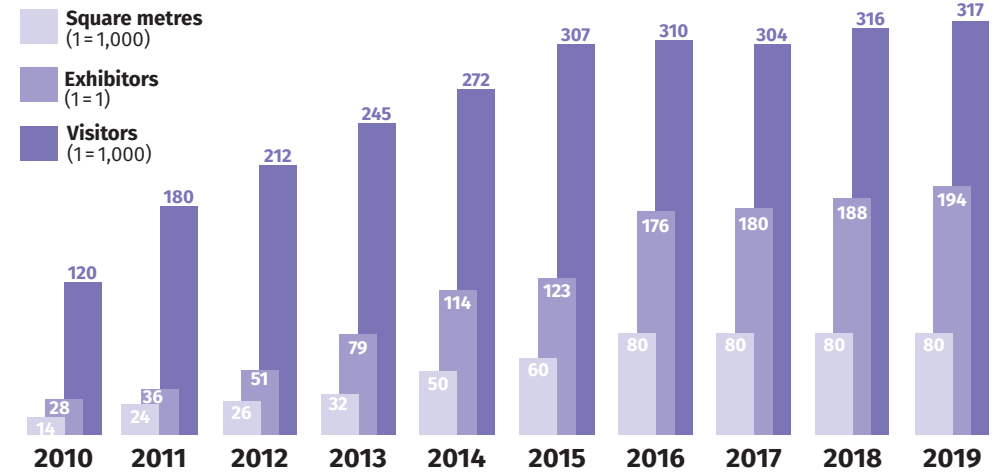
A FRIENDLY AND FAMILY EXHIBITION



A SHOW FOR FANS



MAIN REASONS FOR VISITING



2,597 ARTICLES AND MENTIONS, INCLUDING 229 FEATURES AND 14 HOURS OF TV AND RADIO

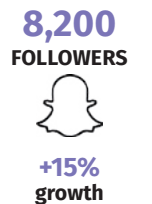
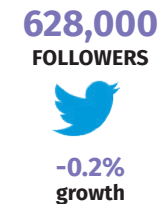
2,368 ARTICLES IN THE PRESS AND ONLINE

10,935 ARTICLES AND REPORTS ON BLOGS AND SOCIAL MEDIA

1,303 ACCREDITED JOURNALISTS

1,400 ACCREDITED INFLUENCERS

SOCIAL MEDIA



TOTAL MENTIONS
974,589

TOP THEMES:
1 GAMES AND CONSOLES
2 BOOTH EVENTS
3 INFLUENCERS



IDEF 2019

The 14th edition of IDEF took place on 1st, 2nd and 3rd July 2019. The event was held at the Juan-Les-Pins Palais des Congrès and was attended by publishers Activision Blizzard, Bandai Namco Entertainment, Electronic Arts, Just for Games, Koch Media, Sony Interactive Entertainment, Take-Two Interactive and Ubisoft.

IDEF 2019 saw the return of the market report

presented at the opening conference. This report is a joint project between SELL, GSD and GameTrack detailing the sector's business activity, gamer profiles and their purchasing habits. The event is also a unique opportunity to bring together the major players in retail and publishing in fun surroundings for business meetings; a great start to the second half of the year and the festive season.





CREATING BENCHMARK CONTENT

SELL CONTINUES TO SPOTLIGHT ESSENTIAL TOPICS FOR THE SECTOR. IT IS THE VOICE OF THE INDUSTRY'S VALUES: CREATIVITY, RESPONSIBILITY, SHARING, DIVERSITY AND UNIVERSALITY.

A dynamic and innovative industry: Essential Video Game News

Providing market figures and gamer purchasing habits, every year SELL publishes several issues of *Essential Video Game News*, reporting on different studies about the French video game market and the profiles and uses of gamers.

Essential Video Game News - special issue: Terrains de jeux

This video documentary accompanied by a special issue of *Essential Video Game News* explores 50 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.





A CULTURAL AND ARTISTIC DIMENSION: VIDEO GAMES AND TALENT

IN 2019, SELL INTENSIFIED ITS COMMUNICATION STRATEGY, ESTABLISHING AN ACTION PLAN BASED ON PERMANENT PROMOTION OF THE VIDEO GAME SECTOR THROUGH CONTENT CREATION. THE OBJECTIVE HERE IS TO GIVE A VOICE TO TALENTED PEOPLE, TO SPREAD THE WORD ABOUT OUR SECTOR.

Player Profile

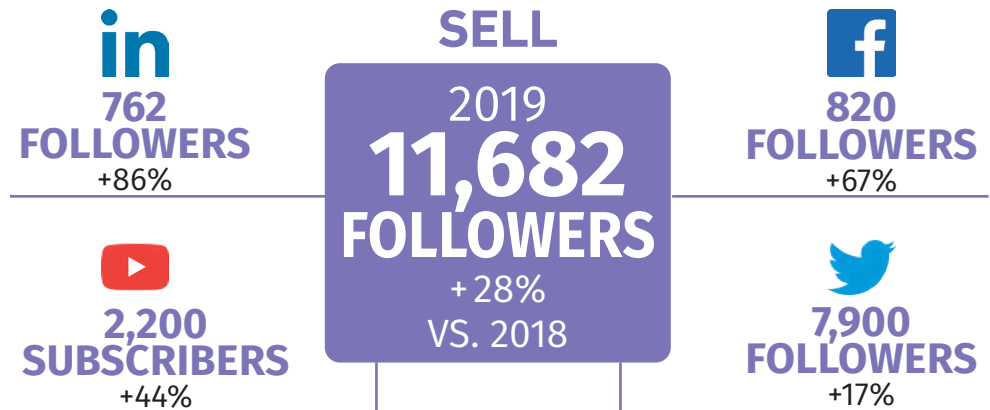
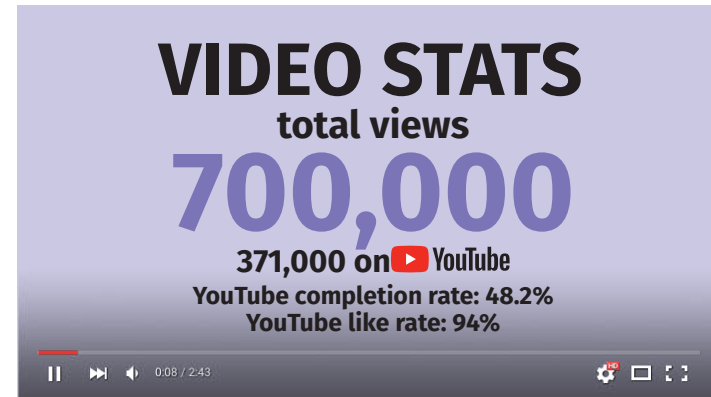
Through this new web series, SELL interviews men and women gamers and particularly focuses on their many different passions. Fashion, running, painting, cinema... These hobbies may initially seem unconnected, but they are all linked. Creativity, competition, sharing...these talents are communicable and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

Play as you are

This nine-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.



DEVELOPING SELL'S DIGITAL ECOSYSTEM



Daily monitoring of the entire ecosystem and creation of a discussion and information cell for agencies that work with SELL



SELL IN THE MEDIA

26 PRESS RELEASES

1 PRESS CONFERENCE:
PARIS GAMES WEEK

81
INTERVIEWS

1

PRESS TRIP

E3 WITH EUROPE 1 / LE FIGARO /
KONBINI / LE POINT POP

3,141

PRESS ARTICLES

47 WEEKLY PRESS REVIEWS

MARKET REPORT 2019 194 MENTIONS, INCLUDING



"The growth of French video gaming, always two figures, riding the digital wave."

Les Echos

"A record year for video gaming in France."



Lunchtime television news
"The French video game market grew by 15% in 2018."

Challenge

"The video game market grew 15% in 2018."

LAUNCH OF THE "GOOD GAMING, GOOD MEMORIES" CAMPAIGN 81 MENTIONS INCLUDING



Before Christmas, parents are made aware of best practices for video gaming:
"Families need to talk about this issue."



"SELL launches a new awareness campaign about video gaming."



"Are you unsure about giving your child a video game for Christmas? How to discuss the issue without stress or arguments."



"Good gaming, good memories."

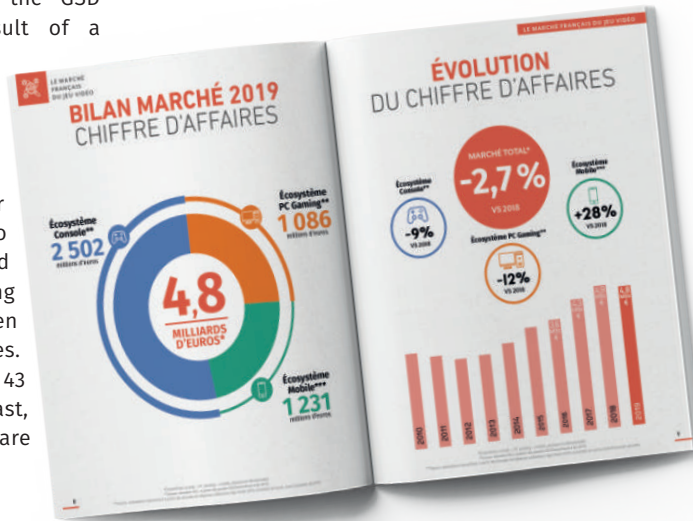
MARKET FIGURES

A benchmark source for French market figures, since its beginnings SELL has published many structural studies for the sector. It works with the ISFE and different research organisations to provide information about the video game market, the profiles and purchasing habits of French gamers.



GSD

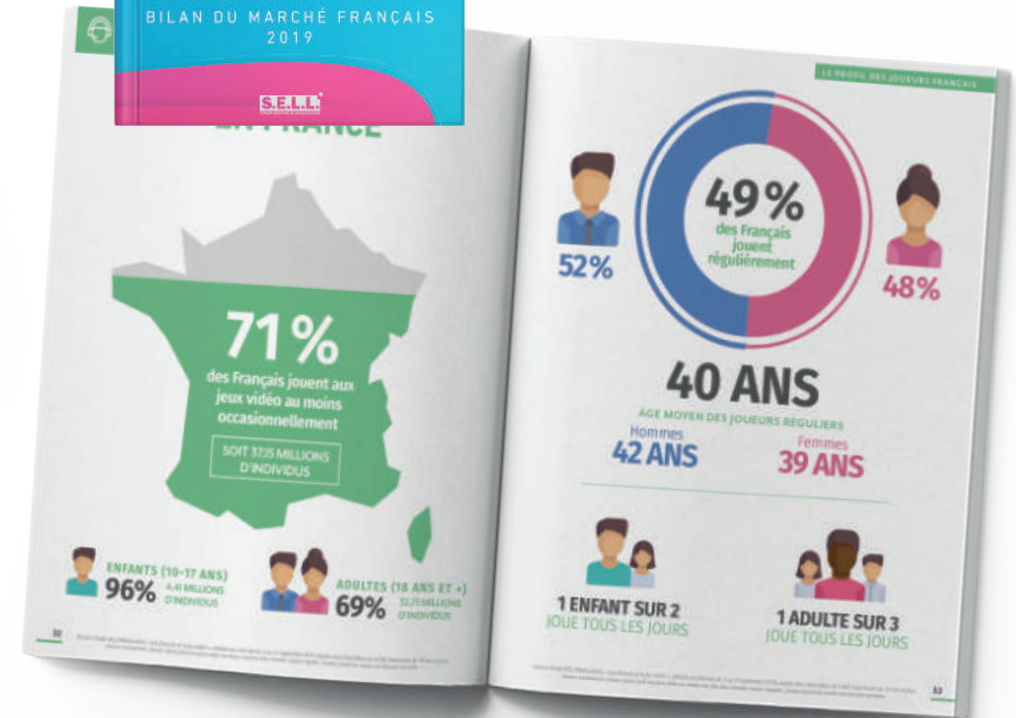
Launched in 2013, the GSD project is the result of a European initiative run by the ISFE with around a hundred partners, with the aim of unifying data collection from different territories and regrouping this data (physical or digital) within one tool available to trade associations, distributors and video game publishers participating in the panel. The retail panel has been launched in 23 European countries. The GSD digital panel today covers 43 countries in Europe, the Middle East, Africa and Asia-Pacific. These panels are operated by B2Boost.



FRENCH PEOPLE AND VIDEO GAMES



The "French people and video games" study by Mediamétrie for SELL aims to define the profile of a typical video game player. By analysing the answers of over 4,000 interviewees, the survey shows changes in player typologies, their gaming, buying, cultural and leisure habits. This survey is delivered every year in October, for Paris Games Week.



GAMETRACK

GameTrack

GameTrack is an additional project set up in 2011, built around a consumer panel and managed by Ipsos for the ISFE. GameTrack data comes from monthly survey data published quarterly. It 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.



UNION LIFE

SELL's actions are structured around the **Board of Directors**, heavily invested in all problems dealt with by the professional organisation.

Twice a year a **General Meeting** presents members with a report on the actions implemented and the directions for the coming months.

The SELL team also organises **themed commissions** (legal, CSR, data, eSport, Paris

Games Week, advertising) to define the union's actions with member representatives.

SELL's **internal newsletters** help communicate to all members about public affairs, the industry, events we organise and union life in general.

Member information is the key priority in SELL's mission.



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General Delegate

Anne Sophie Montadier

Communication and Marketing Manager

Camille Adam

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