

OCTOBER 2018

ESSENTIAL

VIDEO GAME NEWS

MARKET - CONSUMPTION - USE



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VIDEO GAME NEWS

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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.

SELL is certified QUALI'OP by AFNOR which guarantees SELL's best practices in the services it provides its members.

CHAPTER 1

PROFILES OF FRENCH GAMERS



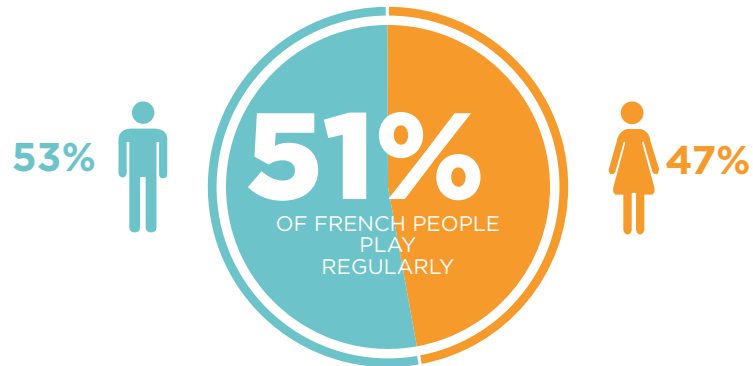
ABOUT the SELL "French public and Video gaming" survey

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

The survey was carried out online from 6th September to 1st October 2018 with a sample of 2,856 people aged 10 and over, representing web users living in France.

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VIDEO GAMING: A LEISURE ACTIVITY FOR EVERYONE



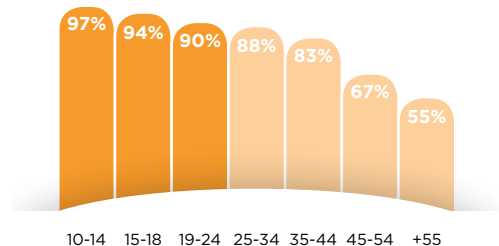
74%
OF FRENCH PEOPLE PLAY AT LEAST OCCASIONALLY

39
AVERAGE AGE OF REGULAR GAMERS
MEN **41** - WOMEN **37**

AVERAGE GAMER AGE PER PLATFORM

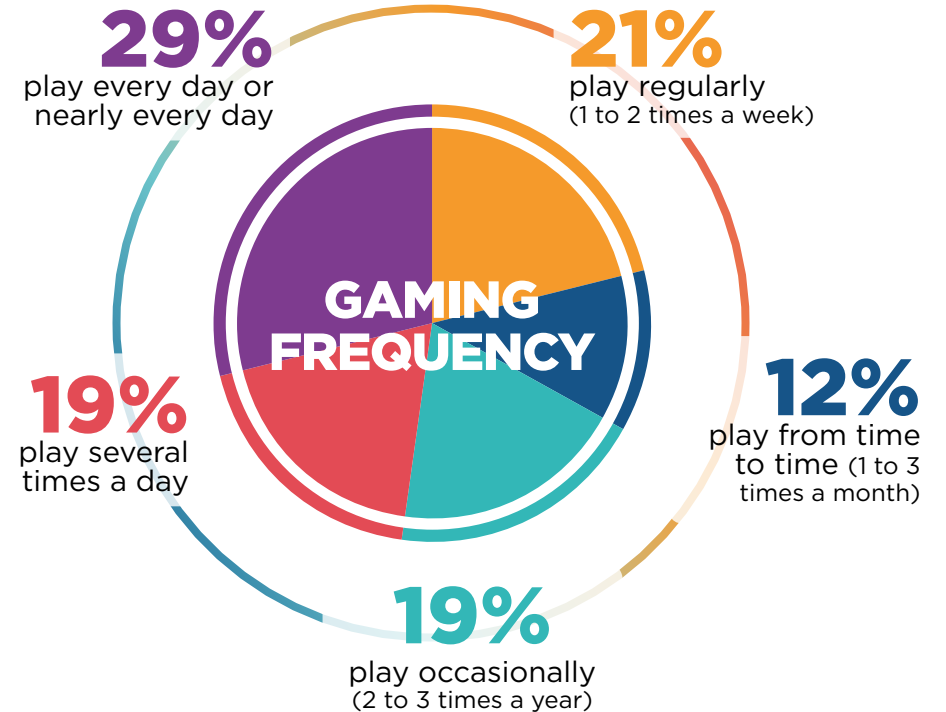


PERCENTAGE OF GAMERS BY AGE GROUP

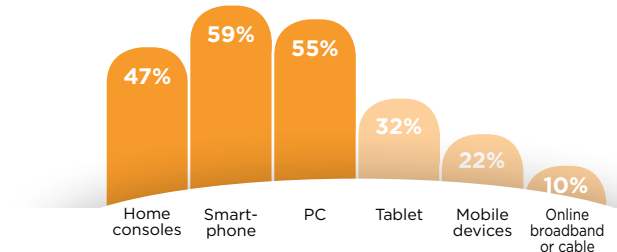


Source: online SELL/Médiamétrie "French people and video games" study, from 6th September to 1st October 2018, with a sample of 2,856 web users aged 10 and over.

FRENCH GAMERS



BREAKDOWN OF GAMERS BY PLATFORM



Source: Source: online SELL/Médiamétrie study "French people and video games", from 6th September to 1st October 2018, with a sample of 2,856 web users aged 10 and over.

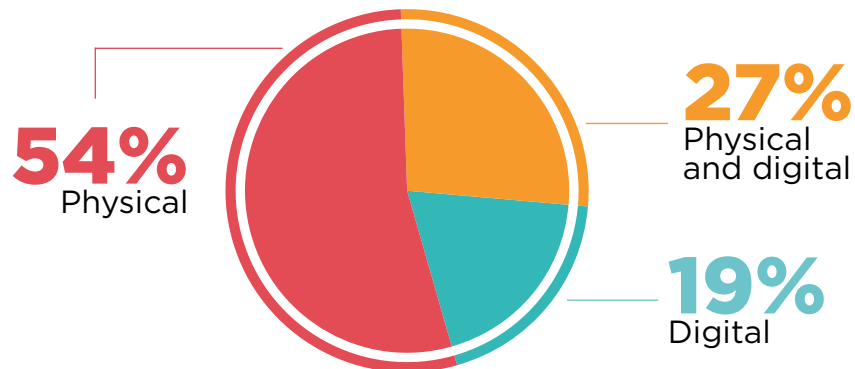
DATA AND PURCHASING BEHAVIOUR



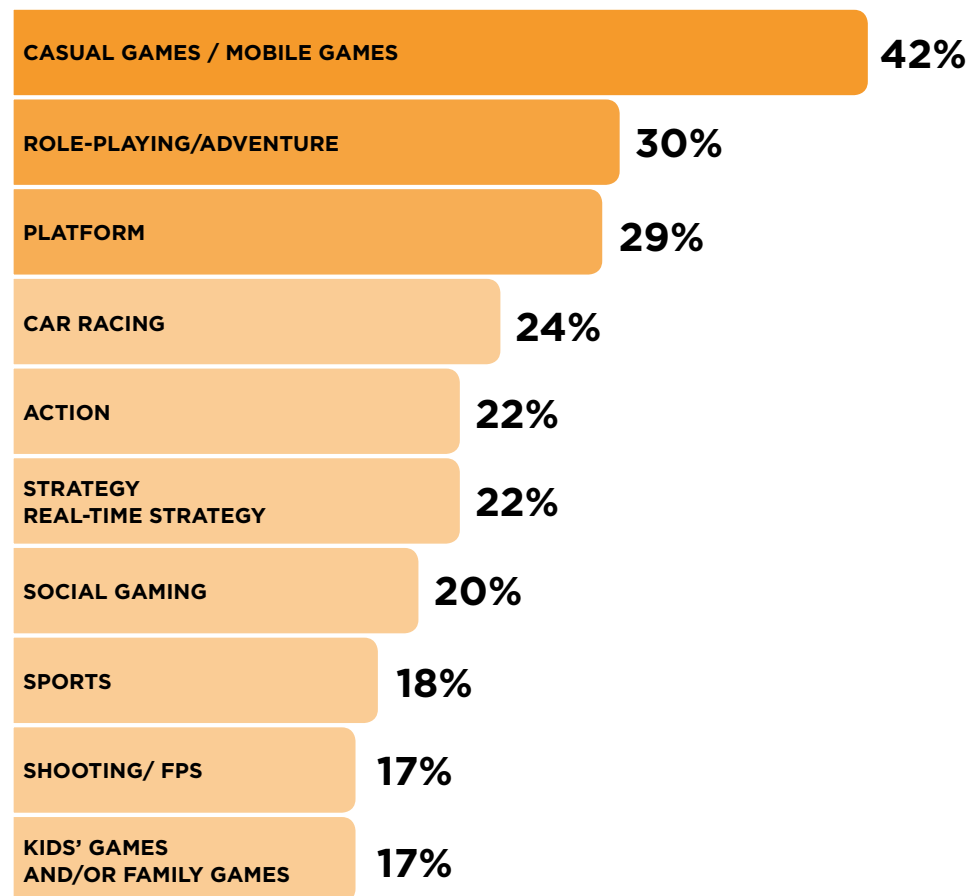
VIDEO GAME PURCHASES



FORMAT OF VIDEO GAMES PURCHASED



TOP 10 TYPES OF VIDEO GAMES THE MOST PLAYED IN 2017



FRENCH PEOPLE AND VIDEO GAMES

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

75%

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

62%

OF FRENCH PEOPLE consider video gaming a positive activity



89%

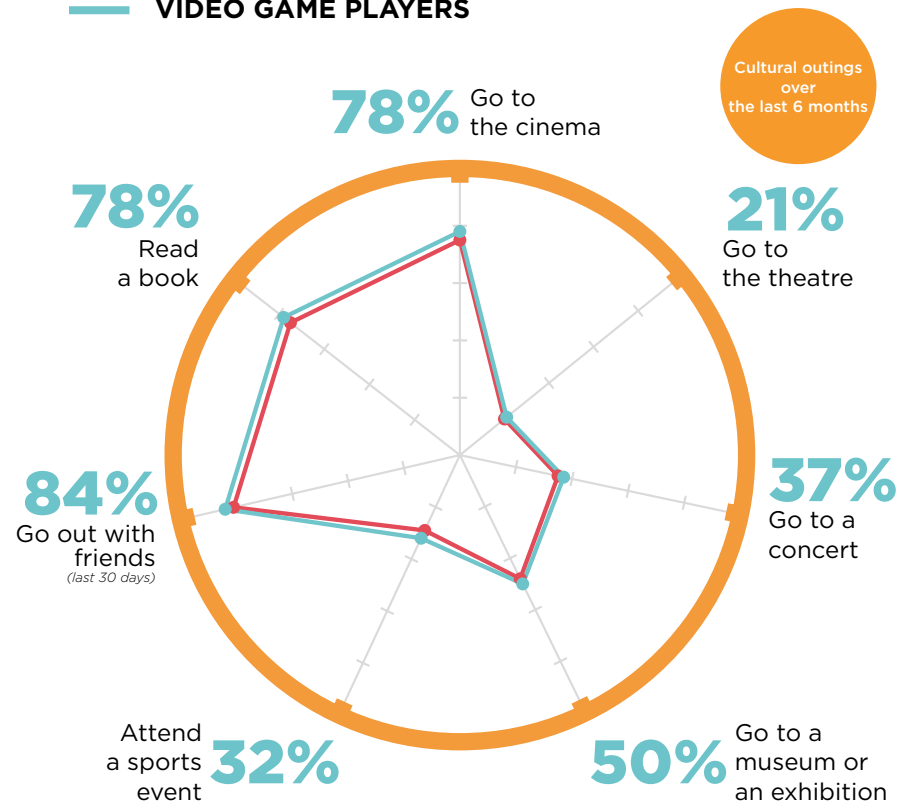
OF FRENCH PEOPLE consider video games an innovative sector

84%

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

FRENCH PEOPLE AND THEIR HABITS

ALL WEB USERS AGED 10 AND OVER
VIDEO GAME PLAYERS



PLAY SPORT OR EXERCISE REGULARLY



CHAPTER 2

UNDERSTANDING THE VIDEO GAME MARKET



GAMETRACK *App Annie*



NEW PANELS

Estimations for 2017 turnover are the result of collaboration between three organisations providing SELL their data, for a precise analysis of the sector's activity.

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



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 participating in the panel. France is the first country to communicate its official market data through GSD data. Other countries and regions will follow over the coming months: Belgium and the Netherlands, Spain and Portugal, Italy, Nordic countries, then Austria, Germany, Switzerland and Poland mid-2018 and the United Kingdom in early 2019.

The panel is operated by b2boost.

Methodology:

- Distributor 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. Furthermore, the publishers provide data to hone the extrapolation calculation models to offer a sharper vision of markets who are not completely covered by the distributor 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 complete game downloads based on real sales data.



ABOUT GAMETRACK

GameTrack is an additional project set up in 2011 and 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 and helps 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. This survey 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.

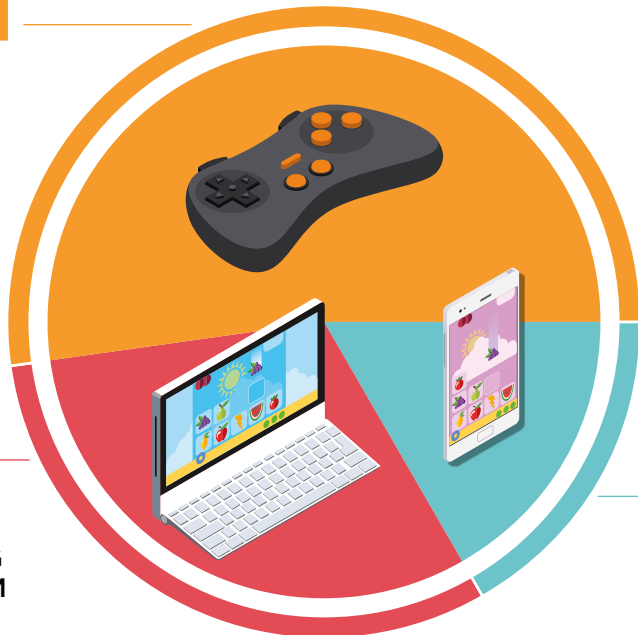


2017 MARKET REPORT

TURNOVER

4.3 BILLION EUROS

CONSOLE ECOSYSTEM
2,401
MILLION EUROS



PC GAMING ECOSYSTEM
1,124
MILLION EUROS

HAND-HELD ECOSYSTEM
778
MILLION EUROS

GROWTH

IN SALES

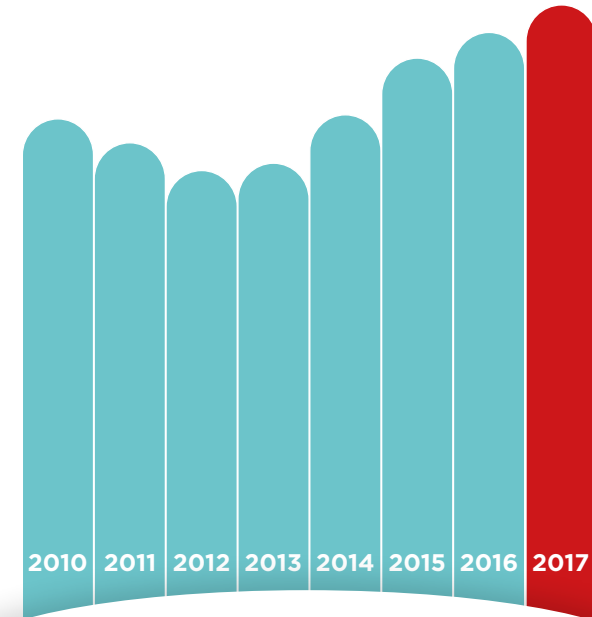
*overall market

+ 18% VS 2016

CONSOLE ECOSYSTEM
+ 23%
vs 2016

PC GAMING ECOSYSTEM
+ 6%
vs 2016

MOBILE ECOSYSTEM
+ 22%
vs 2016



4.3
BILLION EUROS**

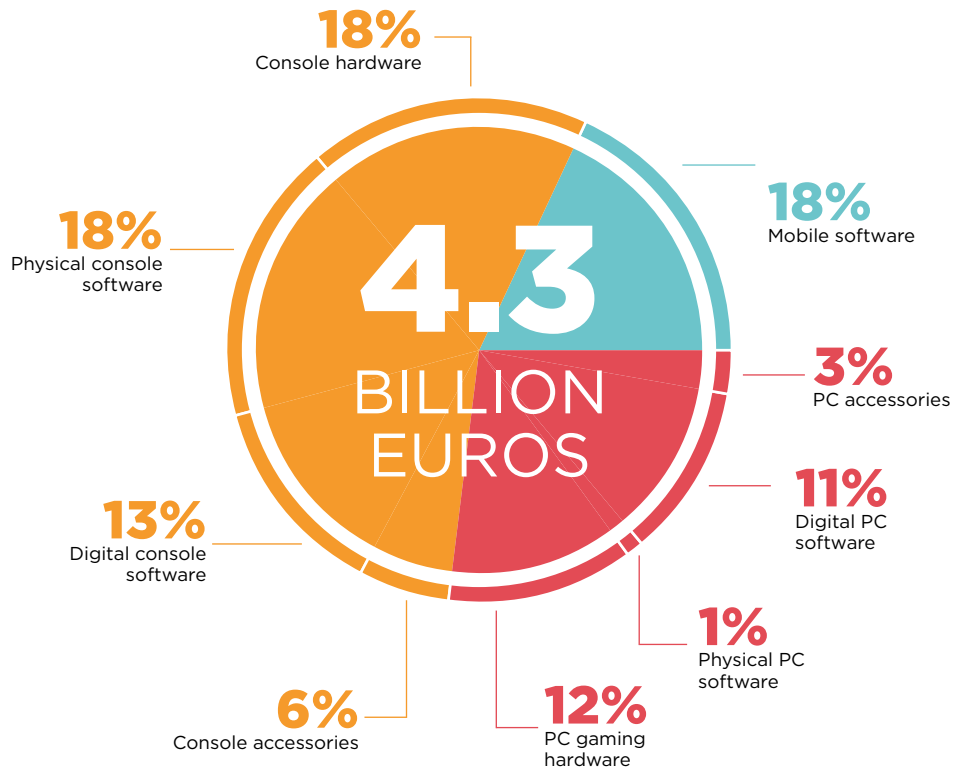
+ 18%**

Source: SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017.
**2016 turnover: 3.64 billion euros

Source: SELL data, from GSD/GameTrack/App Annie Intelligence panels at end 2017.
*ecosystems: Console + PC + mobile, physical + digital **2016 turnover: 3.64 billion euros

CLOSE-UP: SEGMENTS

MARKET SHARE

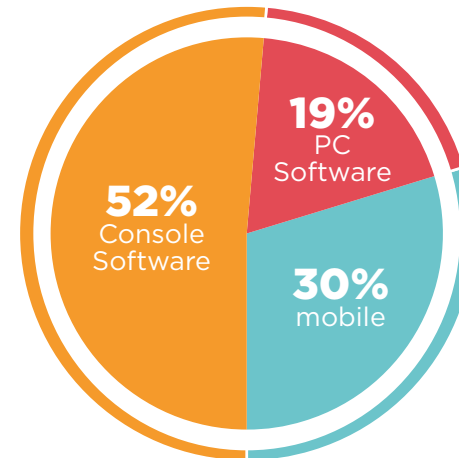


CLOSE UP:

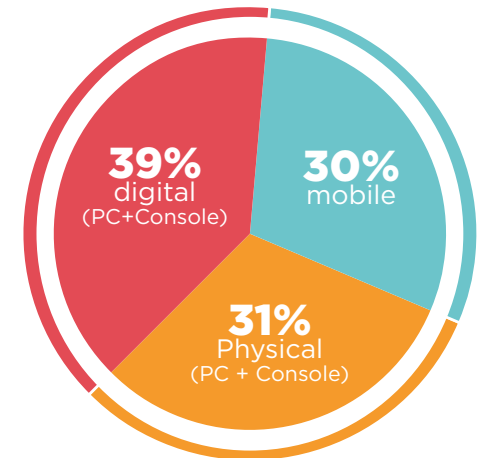
SOFTWARE



BREAKDOWN OF TURNOVER BY PLATFORM



BREAKDOWN OF TURNOVER



CHAPTER 3

A RESPONSIBLE INDUSTRY

PARENT BEHAVIOUR TOWARDS VIDEO GAMES

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

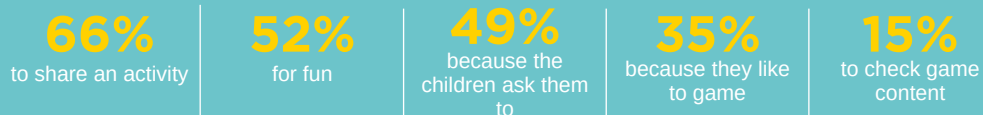


THE ACT OF BUYING AND THE PEGI RATING SYSTEM

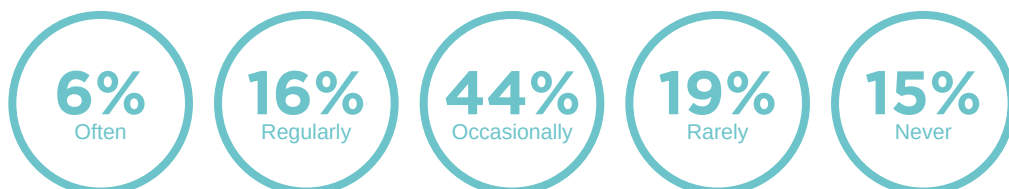
ATTITUDE TO THE PEGI RATING SYSTEM



WHY DO PARENTS GAME WITH THEIR CHILDREN?



GAMING FREQUENCY OF PARENTS WITH THEIR CHILDREN



Source: online SELL/Médiamétrie "French people and video games" study, from 6th September to 1st October 2018, with a sample of 2 web users aged 10 and over.

Source: online SELL/Médiamétrie "French people and video games" study, from 6th September to 1st October 2018, with a sample of 2 web users aged 10 and over.

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.

CREATED IN 2003

PRESENT IN 38 COUNTRIES

NEARLY 30,000 GAMES ENDORSED

FEDERATING 1,800 MEMBER COMPANIES









Launched in spring 2003, it 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 applied to 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 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. They are descriptors (see page 41) appearing on the back cover, indicating the main reasons why a game has a specific age rating.

PEGI LABELS

	 VIOLENCE	 BAD LANGUAGE	 FEAR	 SEX	 DRUGS	 GAMBLING	 DISCRIMINATION	 IN-GAME PURCHASES
3 www.pegi.info								
7 www.pegi.info	X		X					
12 www.pegi.info	X	X	X	X	X	X		
16 www.pegi.info	X	X		X	X	X		
18 www.pegi.info	X	X		X	X	X	X	

THE LABELS

3
www.pegi.info

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

12
www.pegi.info

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

18
www.pegi.info

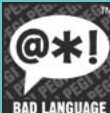
Extreme violence to defenceless or innocent human characters.
Idealisation of drug use.
Sexual expression or activity.

7
www.pegi.info

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

16
www.pegi.info


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

 BAD LANGUAGE


This game contains bad language.

 DRUGS


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

 VIOLENCE

This game contains violent scenes.

 DISCRIMINATION

This game contains images which may encourage discrimination.

 SEX

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

 FEAR

This game may frighten young children.

 GAMBLING

This game encourages and/or teaches gambling.

 IN-GAME PURCHASES

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

TO HELP PARENTAL CONTROL

As well as the PEGI system, different manufacturers today offer a parental control system through computers and consoles enabling parents to supervise which games their children play.

For several years, console manufacturers (Sony, Microsoft and Nintendo), Mac and Windows operating systems and also Google have been using the PEGI system to offer a simple and effective parental control solution. Just a few minutes are needed to prevent children accessing games that exceed a certain age category, monitor and control online purchases, limit web browsing and the time spent playing or control the level of online interaction.

	PlayStation 4	Xbox One	Switch	PC	MAC
Limits according to age and PEGI rating	×	×	×		
Controlling online purchasing	×	×	×		
Web filtering	×	×		×	×
Controlling time spent on the device	×	×	×	×	×
Controlling online interaction			×		



CHAPTER 4

INFORM AND PROTECT

PEDAGOJEUX.FR, THE WEBSITE FOR INFORMATION AND RAISING AWARENESS ABOUT VIDEO GAMES

The PédaGoJeux collective of which SELL is a founding member and is very active in its development, has been raising awareness and providing help in understanding video gaming since 2008. PédaGoJeux guides parents by providing best practices that help them better support their children when they

game. To increase its action, the collective is developing a network of ambassadors. They are public or charity organisations working in the fields of family awareness and information. In 2014, this programme received the "Défenseur des droits" label at a celebration of the 25th anniversary of the Convention



on the Rights of the Child.

Since 2015, PédaGoJeux has also focused on younger gamers through PédaGoJeux Junior, a space with content dedicated to 6-12 year olds.



WOMEN IN GAMES FRANCE: DEVELOPING SEXUAL EQUALITY

After the plan to promote sexual equality in the digital sector was signed, Women In Games France was born. It is committed to encouraging women to join the video game sector, facilitating their professional careers and promoting diversity amongst the key sector stakeholders in France. The association's first

initiative is to federate women in the industry who want to share their expertise in events, round tables and interviews. SELL has obviously supported Women In Games France since its creation in September 2017, giving the organisation the opportunity to dialogue with visitors at Paris Games Week. A networking

event was organised at the show where over 300 participants met each other. The event was attended by Mounir Mahjoubi, Secretary of State for Digital Technology.

GAMECODE: A GAME DESIGN APP FOR 9-14 YEAR-OLDS



With GameCode, children are introduced to programming, discovering the secrets behind making video games and creating their own games. The app, created with SELL's support, was officially launched at Paris Games Week 2015 through workshops organised with Tralalere in PédaGoJeux's area. In 2017, PGW hosted a meeting between GameCode and Women In Games with a joint workshop to present game development to young women.

The app is also available free of charge from the website code-decode.net. GameCode takes 9-14 year-olds behind the scenes in making video games and also introduces the notions of programming. Fun and educational, it helps children create their own games by developing their digital culture.

You don't have to be a computer whiz to use GameCode. The app is designed to be used at school and within the scope of school activities.

GameCode has a guided tour and a complete teacher booklet (info sheets, assessments, class 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 SELL and the European Union. The app also has the support of Caisse des Dépôts within the framework of the Projets d'Investissement d'Avenir (Future Investment Projects).



RESPECT ZONE: A LABEL EDUCATING PEOPLE ABOUT RESPECT

SELL has supported Respect Zone since it was founded. It is a brand new label to fight cyber violence positively and promote respect on the internet.

Created in 2014, Respect Zone is a non-profit organisation accessible to all who subscribe to the principle of respect on the internet and the Respect

Zone charter. With this label, the organisation offers a modern tool to help fight toxic behaviour on the internet.

SELL offers Respect Zone an area for advertising and networking at every edition of Paris Games Week.

CHAPTER 5

PARIS GAMES WEEK



PARIS GAMES WEEK 2018

THE MUST FOR VIDEO GAME TALENTS AND COMMUNITIES

The 9th edition of Paris Games Week will open its doors at the Porte de Versailles Exhibition Centre from 26th to 30th October 2018. A must for all video games fans, since its creation in 2010 the show has become the flagship event for the entire video game ecosystem. Over a week, the industry's communities, families and talents meet at Porte de Versailles to spotlight the sector's incredible scope.



Enthusiasm for Paris Games Week is a reflection of our sector's fabulous energy bolstered by the talented people that are continuously innovating and reinventing and by the communities of fans that are increasingly committed. For five days, Paris Games Week 2018 will take over 80,000 m² in Halls 1, 2.2 and 3 of Paris Expo – Porte de Versailles as a celebration of this fabulous wealth, hosting all those who help the heart of the industry beat faster.

ALL THE FACETS OF VIDEO GAMING AT PARIS GAMES WEEK

A little-known practice at its beginnings, video gaming is today a planet-wide leisure activity that reaches millions of people: men, women, children, seniors, parents... In 2018, everyone plays! Paris Games Week 2018 will be the showcase for all video game practices and a sector that is committed to creating more inclusive gaming. A record number of exhibitors will attend, representing all the components of video gaming. Communities, families, publishers, developers, universities, accessory manufacturers, associations, cosplayers, eSports players: they will all be there to make Paris Games Week the biggest party dedicated to the 10th art.

The recipe for the show's success remains the same: something for everyone. Over the October school holidays, Paris Games Week will be the place to be to test all the new products for the end of year releases: hardware, software and accessories. Thanks to the talent of the designers and a generation of exceptional consoles, the show will present a preview of the most keenly awaited releases for 2019. Publishers will also host many events to build increasingly strong links with their communities. Attentive to gamers all year round, Paris Games Week is an opportunity for the industry to pay tribute to them and together celebrate



their passion for video games. A genuine spectacle that federates increasing numbers of fans, eSport competitions will once again be celebrated with an entire hall dedicated to them. Paris Games Week will host the best gamers in the world who will compete in the finals of international competitions. Finally, the show will offer visitors a chance to discover fun video game worlds that are rich and varied. Hosting French and international studios, Paris Games Week Junior and Silver Geeks, Paris Games Week 2018 celebrates every type of video gaming!

“

Paris Games Week 2018 is looking to be an exceptional event for all video game fans. All the sector's components will be there to share fun gaming moments in a warm and friendly atmosphere. We wanted to offer gamers and families a welcoming experience, continuing the work accomplished over many years and ensuring visitor comfort and information.

”

Julie Chalmette
SELL Chairwoman

PARIS GAMES WEEK SYMPHONIC BY VIDEO GAMES LIVE

THE SYMPHONIC SHOW WITH
A ROCK EDGE RETURNS FOR
A BRAND NEW CONCERT!

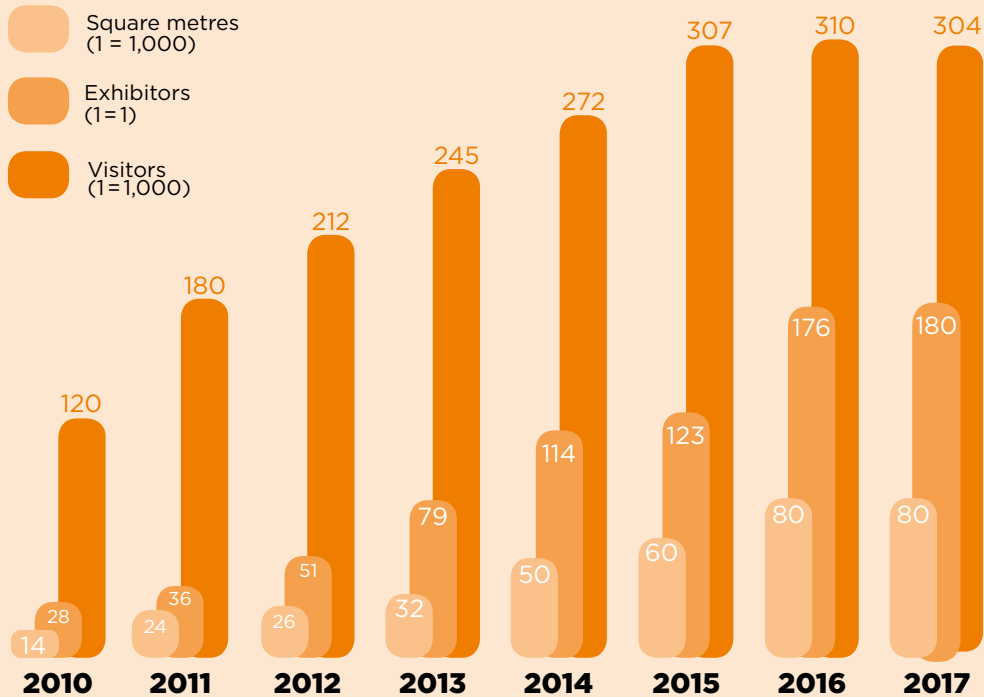
After the first historic concert in 2017, Paris Games Week takes on a new dimension and invites all music and gaming lovers to an exceptional event: Paris Games Week Symphonic by Video Games live. The symphonic show with a rock edge will present the most popular and iconic video game tracks played with light and sound by the Yellow Socks Orchestra. An original and unique immersive concert created, produced and presented by famous composer Tommy Tallarico, founder of Video Games Live.



INFOS ET RÉSERVATIONS SUR WWW.PARISGAMESWEEK.COM



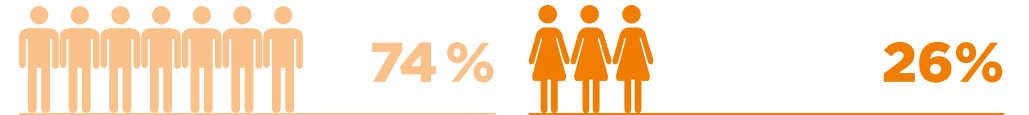
FOR THE 8TH EDITION OF PGW: 340,000 VISITORS FEDERATED BY THEIR PASSION FOR VIDEO GAMES



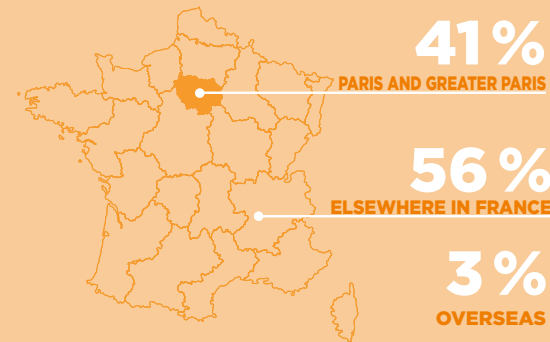
PARIS GAMES WEEK 2017 IN FIGURES

VISITORS AT PGW

VISITORS AT THE SHOW



Geographic origin



Average age



FOCUS ON VISITS TO PGW

51%
CAME FOR THE FIRST TIME

THEY VISITED THE SHOW MAINLY...

45%
with friends

THEY CAME:

75%
to test games

73%
to discover new products

THEY LIKED THE SHOW FOR:

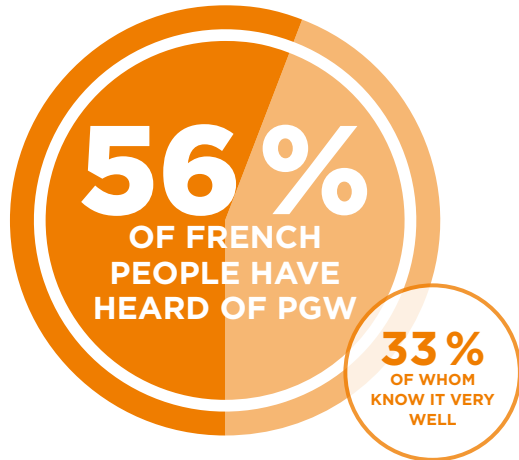
86%
general atmosphere

85%
warm welcome at the booths

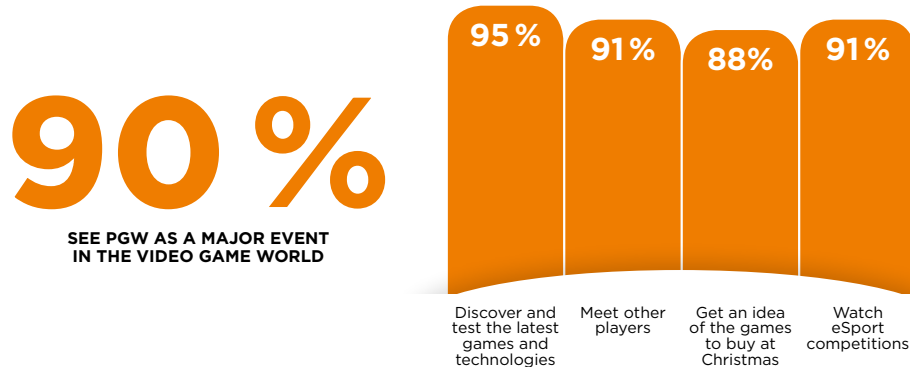
PARIS GAMES WEEK

A MUST FOR ALL GAMING FANS AND THEIR FAMILIES

PGW NOTORIETY



WHY DO THEY COME TO PGW?



Source: online SELL/Médiamétrie study "French people and video games", from 6th September to 1st October 2018, with a sample of 2,856 web users aged 10 and over.



CHAPTER 6

SELL: SYNDICAT DES EDITEURS DE LOGICIELS DE LOISIRS, THE UNION OF VIDEO GAME PUBLISHERS



SELL'S MISSION

The Union of Video Game Publishers (SELL) was founded in 1995 by key players on the video game market. To support the growing video game industry and its accessibility, video game professionals (console manufacturers, game publishers, accessory manufacturers, etc.) needed to speak with 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 approval from the French Home Secretary as the rating system for video games in France.

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

SELL'S MISSION



PROMOTE VIDEO GAMES

SELL's main objective is to promote video games and gaming with the general public, national and European stakeholders and the authorities. It also has a vocation to defend the interests of its members and, more generally, of the entire video game sector.



ORGANISE UNMISSABLE EVENTS

Every year, SELL organises two shows:

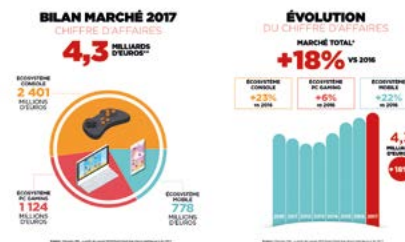
- Paris Games Week (PGW)
- The Interactive & Digital Entertainment Festival (IDEF)

Every year, these two events bring together the main stakeholders in the gaming sector.



INFORM AND PROTECT

Since its beginnings, SELL has been committed to informing and protecting the consumer. In this vein, the organisation operates in many areas to raise the awareness of gamers, parents and families about issues associated with video gaming.



STRUCTURE MARKET INFORMATION

To structure market information, SELL focuses on partnerships to provide the entire gaming ecosystem with a reliable and faithful map of the video game market.

PROMOTING THE INDUSTRY'S CREATIVITY, INNOVATION AND RESPONSIBILITY

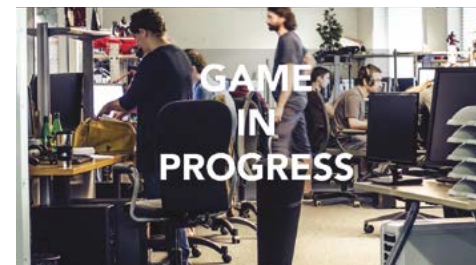


Throughout the year SELL, which embraces an informative, educational and promotional approach to the video gaming industry, gives a voice to many talented people from the sector. Since 2017, SELL has been spotlighting all the richness of video gaming through various documentaries.



ART & VIDEO GAMES

Video gaming represents real popular culture and has millions of passionate fans around the world. However, its artistic dimension is often unknown. Through this documentary series of 5 episodes, SELL spotlights the relationship between classical art and video gaming. The process of creating a video game involves many artists and artistic references, drawing inspiration from the arts to create original works of great scope and diversity. From architecture to music, visual arts to literature and all other sources of inspiration, *Art & video games* invites gamers to learn more about the close links that bind them together.



GAME IN PROGRESS

This 5-episode documentary takes us behind the scenes of designing and creating video games. It reveals the different production stages and introduces the viewer to the professions and talents involved. To present all the creative stages with the greatest accuracy, SELL interviewed a wide cross-section of industry stakeholders, in France and around the world. They discuss the creative aspects, the script and even the technology of their work.



CHECKPOINT

Checkpoint is a series inspired by Proust's questionnaire. SELL interviewed talented people who have shaped the industry: studio founders, creative directors, producers, etc. giving them a voice through an interest in their tastes, personalities, aspirations and more.

Photo: Elijah Wood

FIND ALL THIS CONTENT ON SELL.FR

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