

MARCH 2025

ESSENTIAL

VIDEO GAME NEWS



FRENCH MARKET 2024 REPORT



SYNDICAT
DES ÉDITEURS
DE LOGICIELS
DE LOISIRS

MARCH 2024

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VIDEO GAME NEWS

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SYNDICAT
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EDITORIAL

Despite falling by 5.8% in 2024, video games in France posted their second-best performance ever.

Video games in France are holding their own despite a climate of great macro-economic and political uncertainty. 2024 had the tough task of following 2023 but with sales of €5.7 billion, down 5.8% on 2023, the video game market in France achieved its second best performance ever. Despite an unfavourable economic climate and cyclical effects, **the market has shown stability and regularity, topping the €5.5 billion mark for the fifth year running**, exceeding its pre-Covid 2019 level by 14%. The fall in 2024 should be seen in the light of 2023, an exceptional year for the industry, which benefited from a "historic market", particularly for the console ecosystem. It therefore requires a little perspective. The resilience of our industry is particularly remarkable given the global downturn in household consumption, the contraction in purchasing power and the crisis in the sector at both global and local level.

The strength of the market is based on the complementary nature of the three major ecosystems, which adjust to consumer demand with differentiated offers. There are contrasting performances within each ecosystem (console, PC gaming, mobile), and the results for each are nuanced. **The console ecosystem**, which accounts for almost half the value of the market (45%), recorded a fall of 18.9%, while the **PC gaming** (27% of the market) and **mobile** (28% of the market) ecosystems grew by 9.1% and 8.2% respectively over the year.

The console ecosystem remains the bedrock of the industry, with sales of €2.55 billion and a 45% market share. The decline in the console ecosystem (-18.9%) should be seen in the context of its performance in 2023: that year combined an exceptional software line-up with a recovery in hardware sales (+72%) after a year of shortages. The 35% drop in console sales and the 12% drop in game sales thus appear to be a form of normalisation. This is illustrated by the

fact that digital sales are down by just 4%. Despite a weaker performance than in 2023, video game software **is demonstrating the power of its flagship licences and the wealth of its back catalogue to develop sales of long-selling titles** in the face of the long-term effects of Covid: postponed releases and fewer triple-A games. **This slow year in no way presupposes successes to come in 2025:** highly anticipated game releases, new consoles, etc.

The mobile and PC ecosystems are experiencing strong growth, illustrating undiminished consumer appetite for video games. The mobile ecosystem confirms its excellent health with its fourth consecutive year of growth, reaching an all-time high of €1.6 billion. **The gaming PC ecosystem** has returned to growth (+9.1%), buoyed by a good performance from hardware (+12%) and accessories (+27%) at a time when consumers are refurbishing their equipment.

So 2024 was a year of transition in terms of both hardware life-cycle and software line-up, following a year of atypical hyper-growth. **Although down year-on-year (-5.8%), video games still posted the 2nd best performance in their history, at €5.677 billion.** **This figure highlights the structural strengths of our industry**, strong and constant consumer demand, the diversity of our ecosystems, and our ability to renew our hardware and software offer through innovation. **These prospects should not blind us to the economic difficulties faced by a number of French and international structures**, nor the difficult human and social situation faced by many employees in the industry, but they do allow us to look to the future with a degree of optimism.

JAMES REBOURS,
CHAIRMAN OF SEI

PANELS AND METHODOLOGY

Estimations for 2024 sales are the result of collaboration between four organisations providing SELL their data, for precise analysis of the sector's activity.

- GSD: for the physical market ■ GSD and GameTrack: for the digital market
- Sensor Tower and GameTrack: for the mobile market ■ IDC for PC gaming hardware and screens



ABOUT GSD (GAME SALES DATA)

Launched in 2013, the GSD project is the result of a European initiative run by the VGE (Video Games Europe) with around a hundred partners, with the aim of unifying data collection from different territories and regrouping this data (physical or digital) within one tool available to trade associations, distributors and video game publishers participating in the panel. The retail panel has been launched in 25 European countries. The GSD digital panel today covers 53 countries in Europe, North America, the Middle East, Africa and Asia-Pacific. The panel is operated by Sparkers.

METHODOLOGY

- Retail panel: the data on video game sales is sent by retailers from each country on a weekly basis. The data is standardised, combined, anonymised and extrapolated to recreate the entire market. To guarantee a reliable and standardised product database, the information on catalogues is directly supplied by the publishers. In parallel, the publishers and distributors provide data to hone the extrapolation calculation models to offer a sharper vision of markets that are not completely covered by the retail panel.
- Digital panel: digital data sales cover complete game sales on the PlayStation Network (PSN), Xbox Game Pass, Nintendo eShop (third-party publishers) and PC sales networks (Steam, Epic, proprietary stores). The sales figures are sent each week directly by the 38 video game publishers taking part in the project and therefore do not require any extrapolation. GSD is the only data source for game downloads based on real sales. From 2024, GSD will also be tracking in-game purchases (DLC) in the digital panel.



ABOUT GAMETRACK

GameTrack is a flagship project set up in 2011 operated by Ipsos for VGE (Video Games Europe). GameTrack data comes from monthly survey data published quarterly. The data analyses the demographics of European players and their playing and buying behaviour across all platforms, helping to generate an in-depth view of their video game habits and uses. The countries covered are France, the UK, Germany, Spain and Italy. GameTrack and the GSD project provide a more global vision of the markets in which they operate.

METHODOLOGY

- GameTrack data is collated quarterly from two surveys:
- An offline survey carried out annually on a sample 1,000 people aged 15 and over. It is used to balance answers from a more detailed online survey that helps contextualise the results.
 - An online survey, carried out monthly with a total sample of 3,000 people per quarter, aged 6 to 64.



ABOUT IDC

IDC is a leading provider of research, consulting and event management services to the Information Technology, Telecommunications and Consumer Technology markets. IDC helps IT market professionals and investors make strategic, evidence-based decisions. More than 1,100 analysts have been providing global, regional and local expertise on technology opportunities and trends in more than 110 countries around the world for over 50 years. IDC is a subsidiary of IDG, the global leader in the information market dedicated to information technologies.

METHODOLOGY

IDC tracks sales of hundreds of consumer and professional product categories (both hardware and software) worldwide. Thanks to the largest community of analysts in the market, IDC can draw on and combine three sources: data collected from suppliers (OEMs, component or end-product manufacturers, publishers, etc.), resellers (distributors, wholesalers, VARs, operators, etc.) and surveys of consumers and end users. This information is consolidated globally, verified locally and cross-checked with additional research (financial and economic reports, demographics, etc.).



ABOUT SENSOR TOWER

Sensor Tower provides information and insight into mobile applications, digital advertising, media and audiences for brands and application publishers worldwide.

CHAPTER

01

THE FRENCH VIDEO GAME MARKET

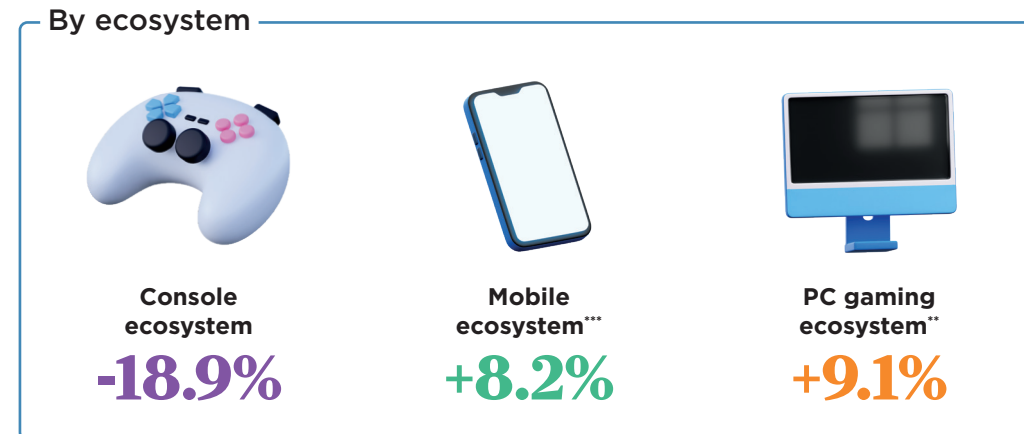


Global market	10
Console ecosystem	16
PC gaming ecosystem	30
Mobile ecosystem	40

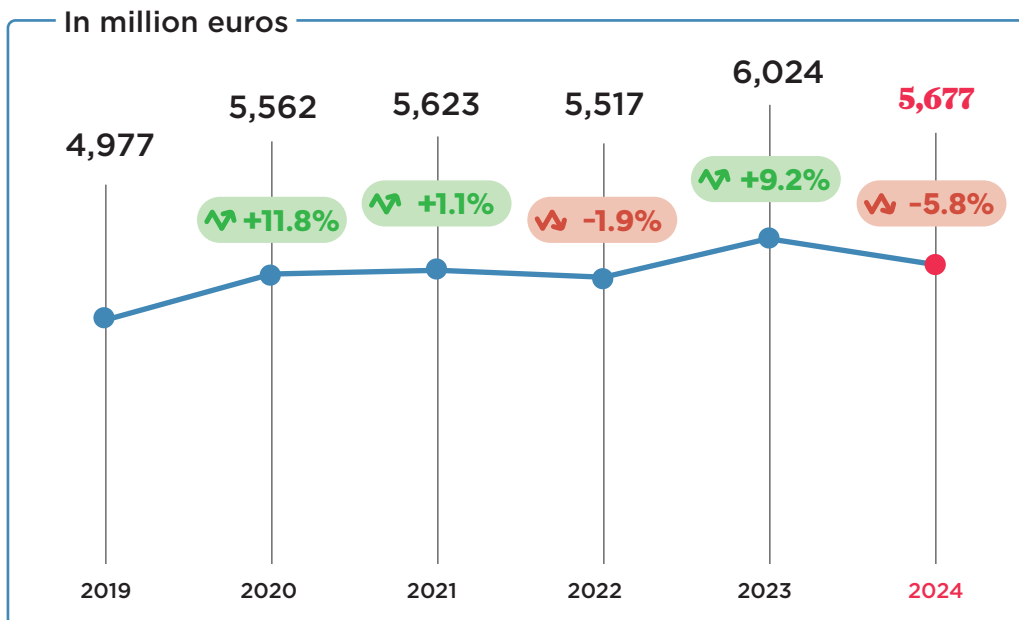
TOTAL SALES 2024



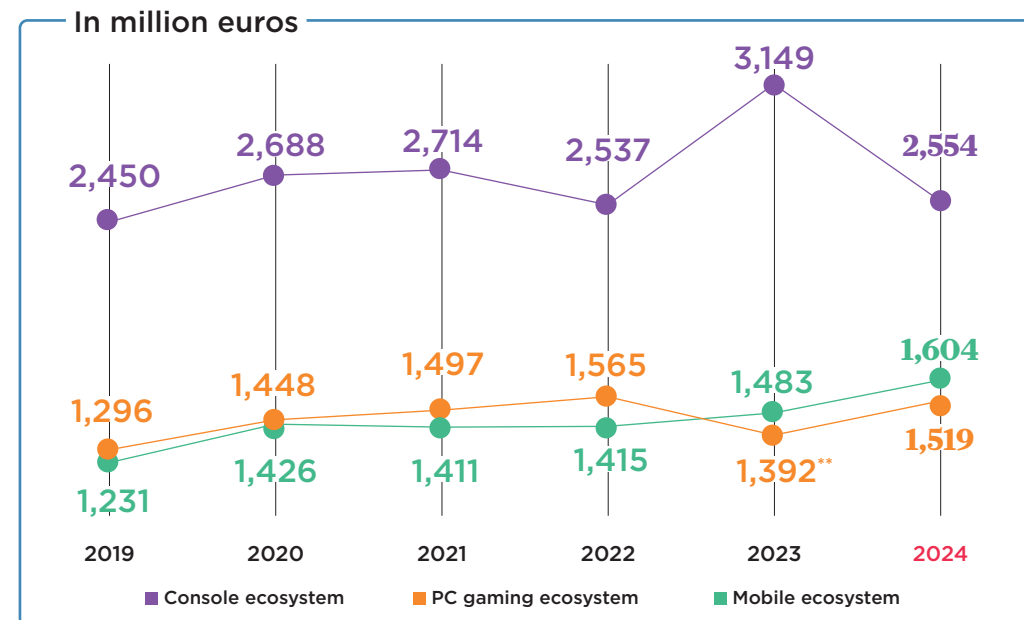
CHANGE IN 2024 SALES*



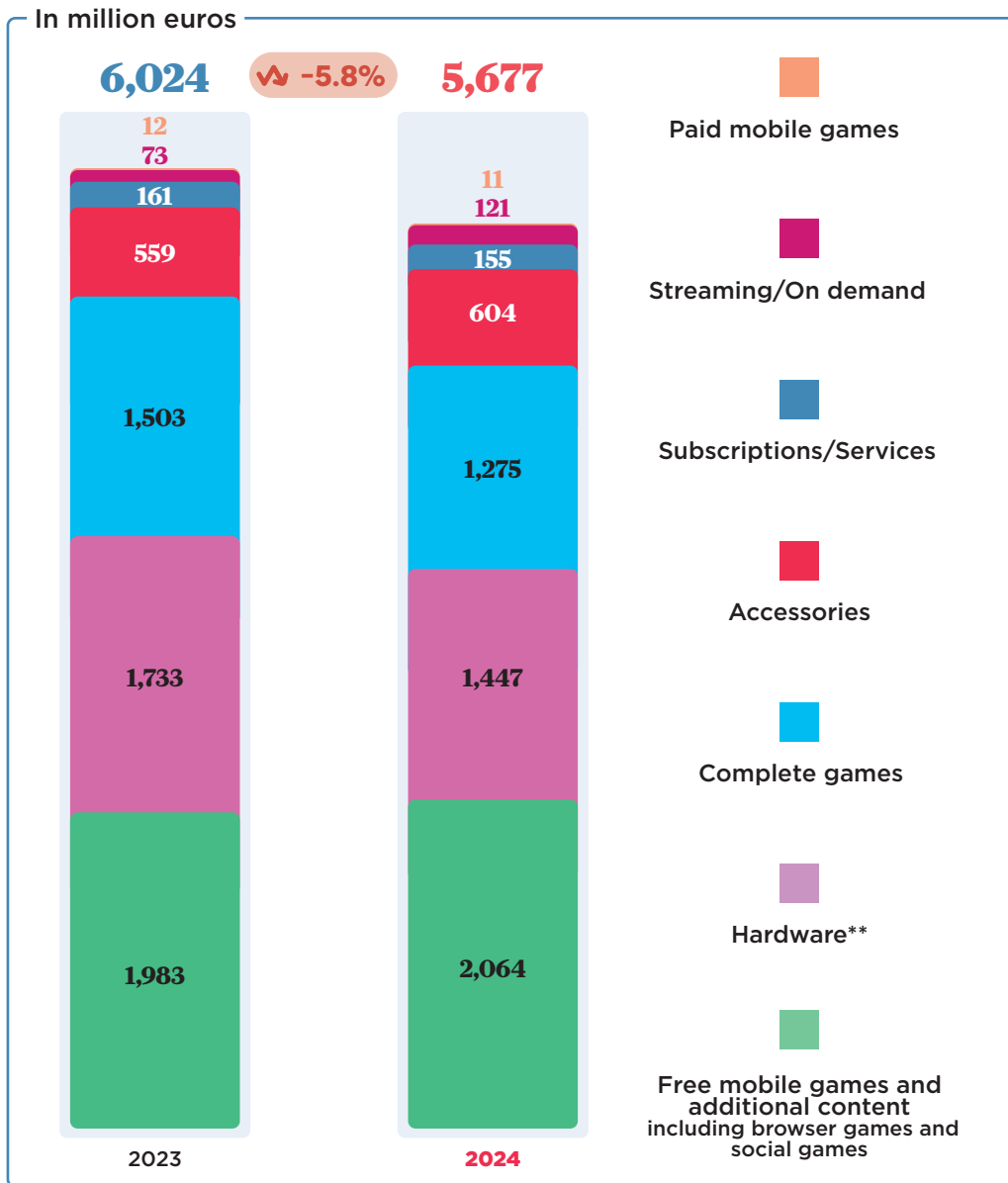
CHANGE IN MARKET SALES



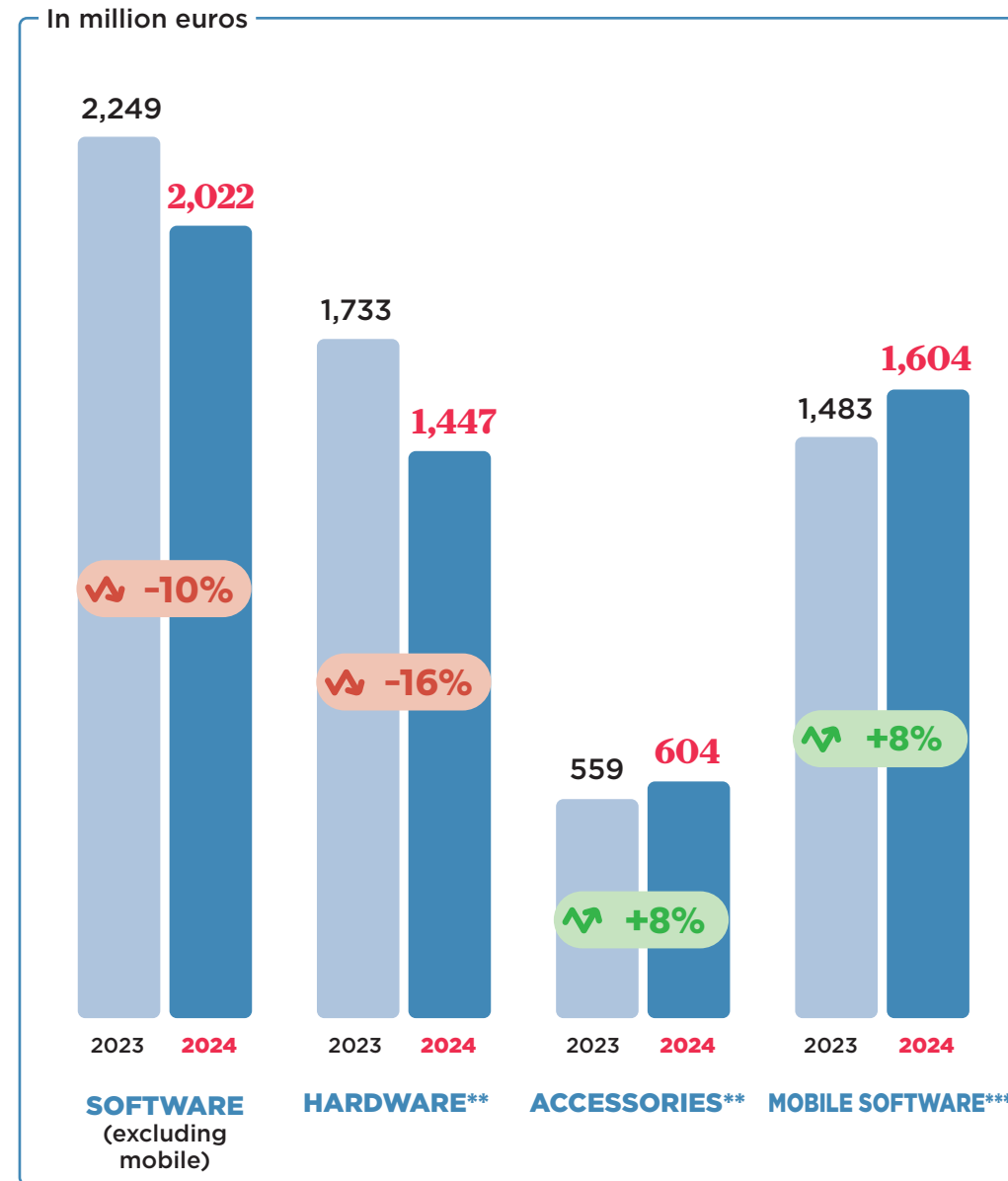
GROWTH IN SALES BY ECOSYSTEM*



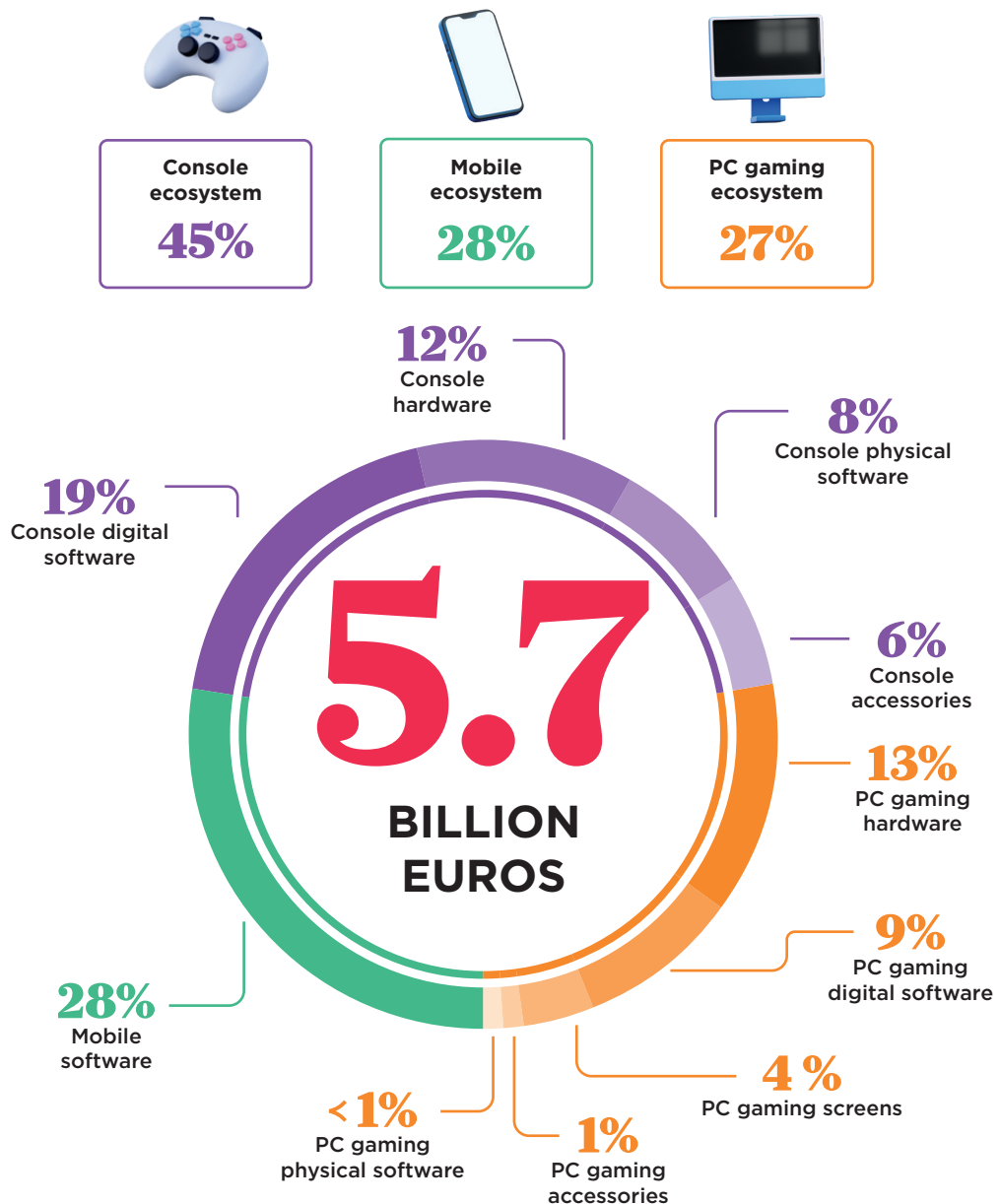
CHANGE IN SALES*



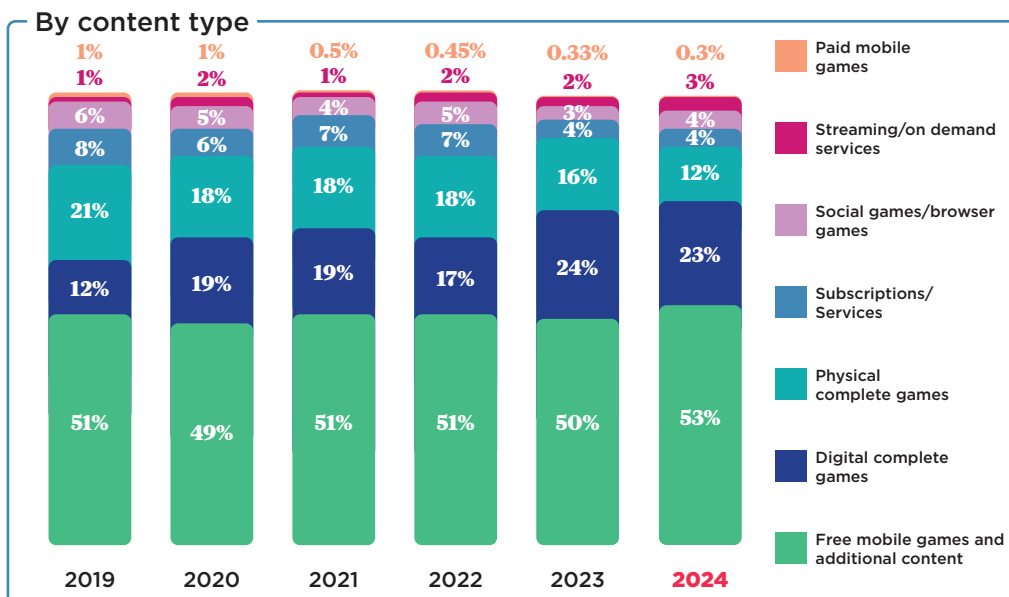
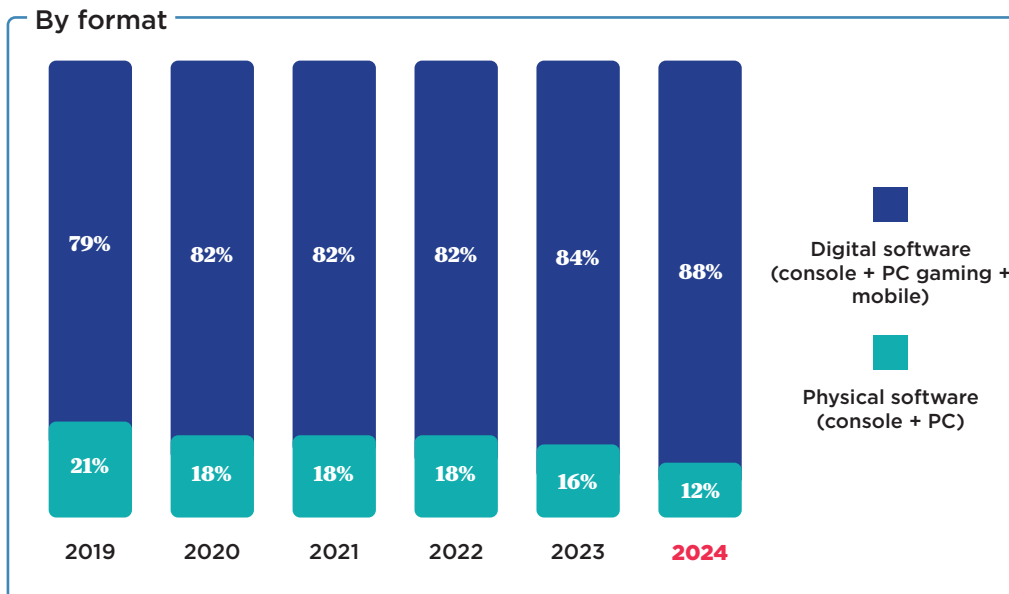
BREAKDOWN OF SALES*



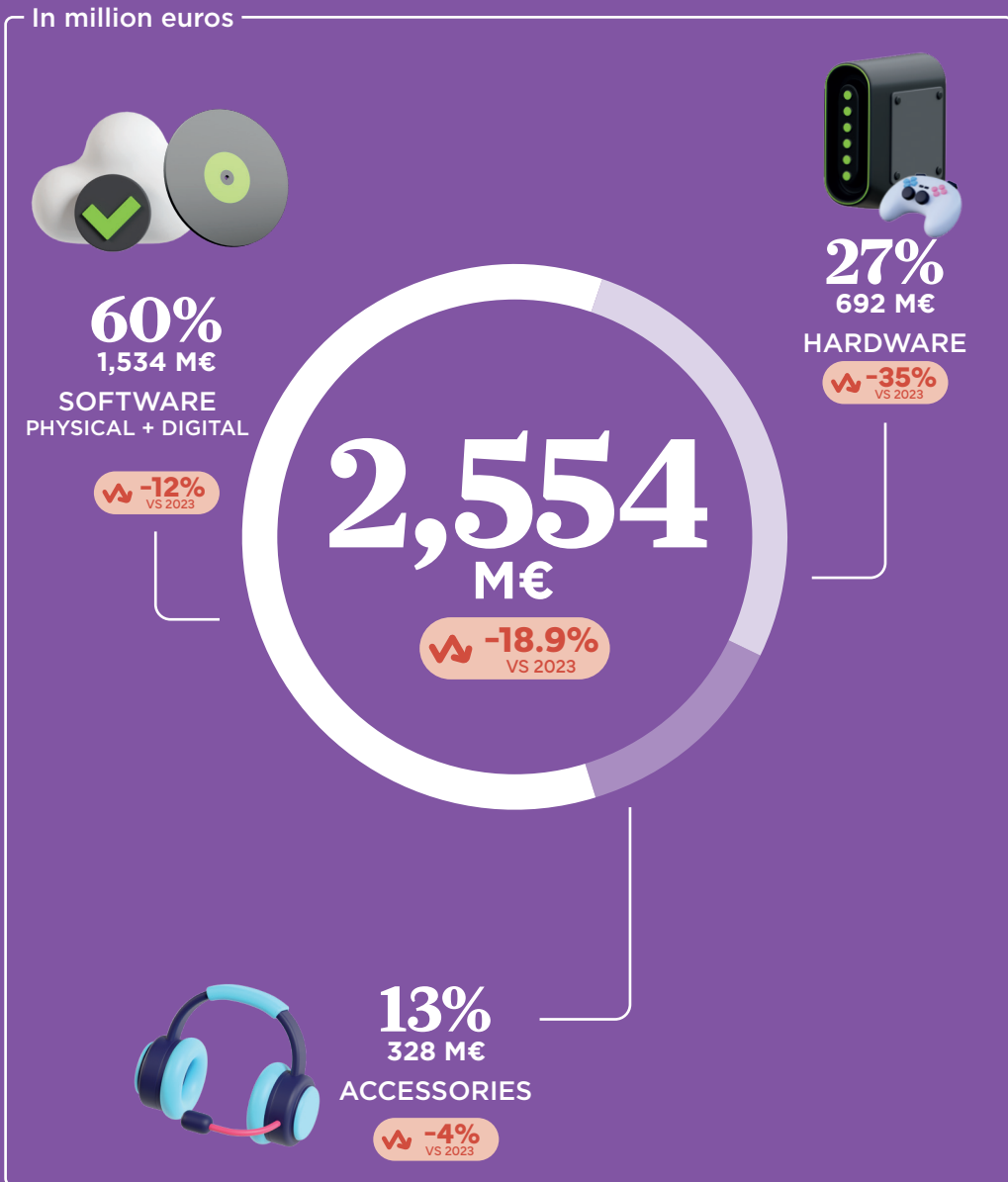
CLOSE-UP: SEGMENTS MARKET SHARE*



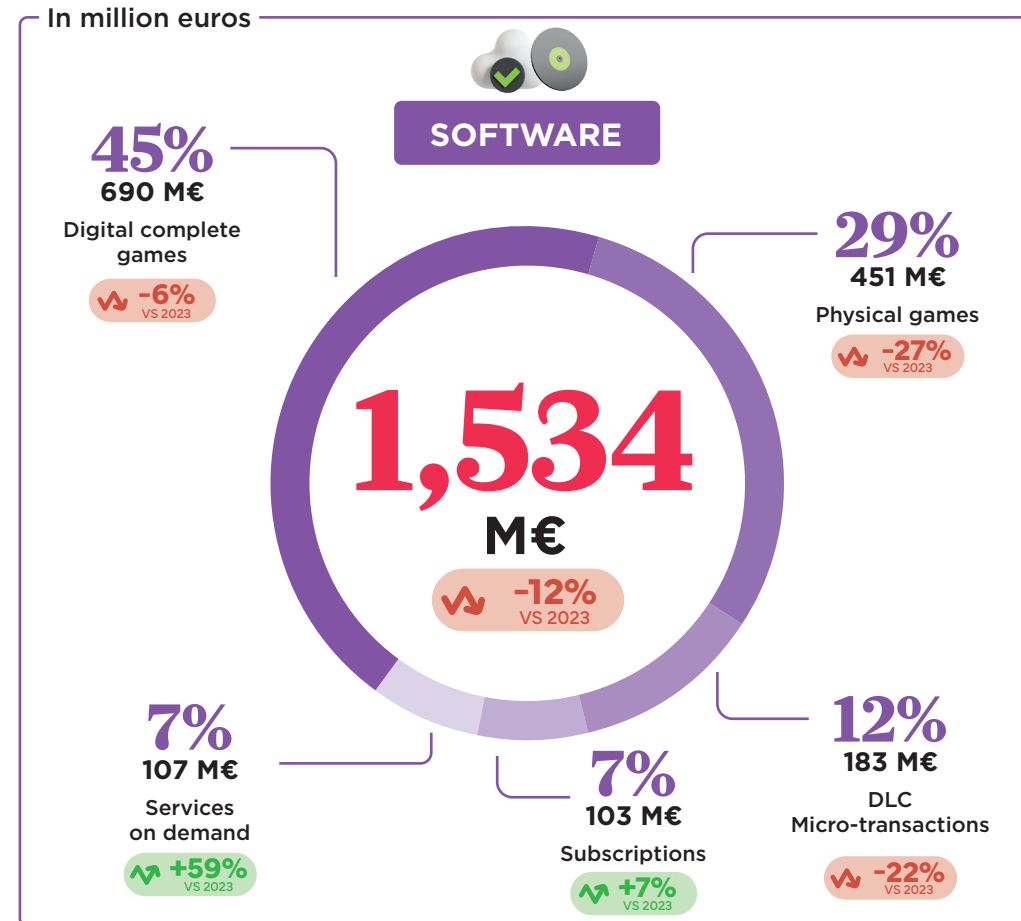
CLOSE-UP: SOFTWARE BREAKDOWN OF SALES



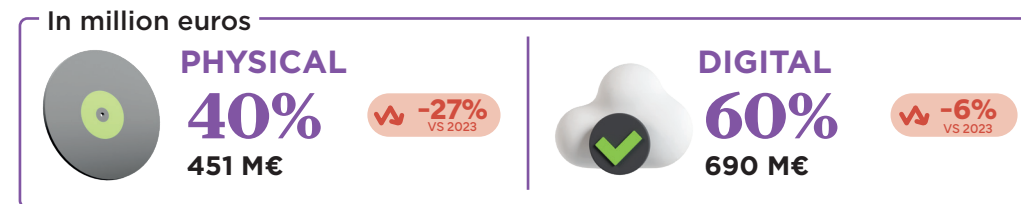
BREAKDOWN OF 2024 SALES



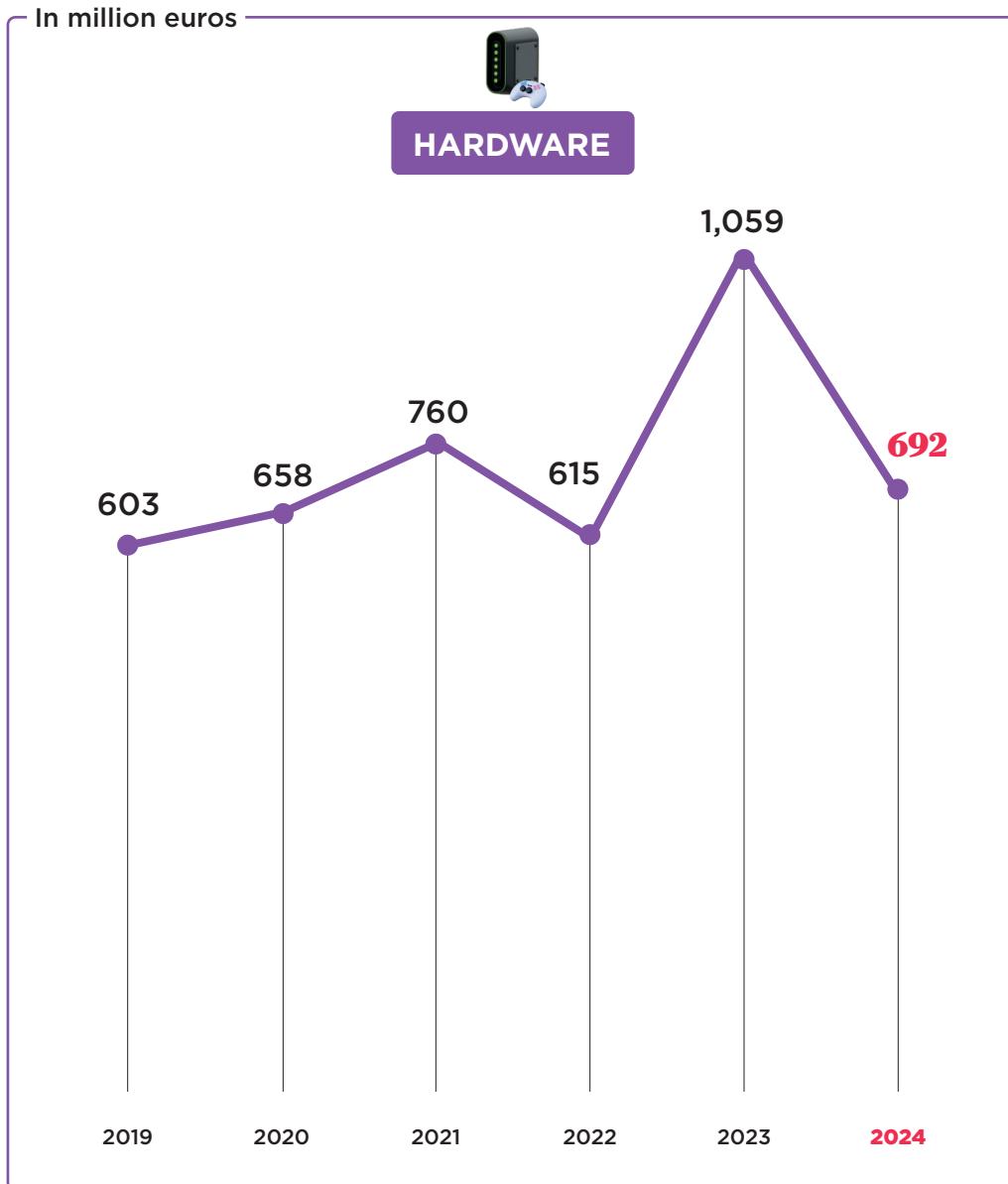
BREAKDOWN OF 2024 SALES



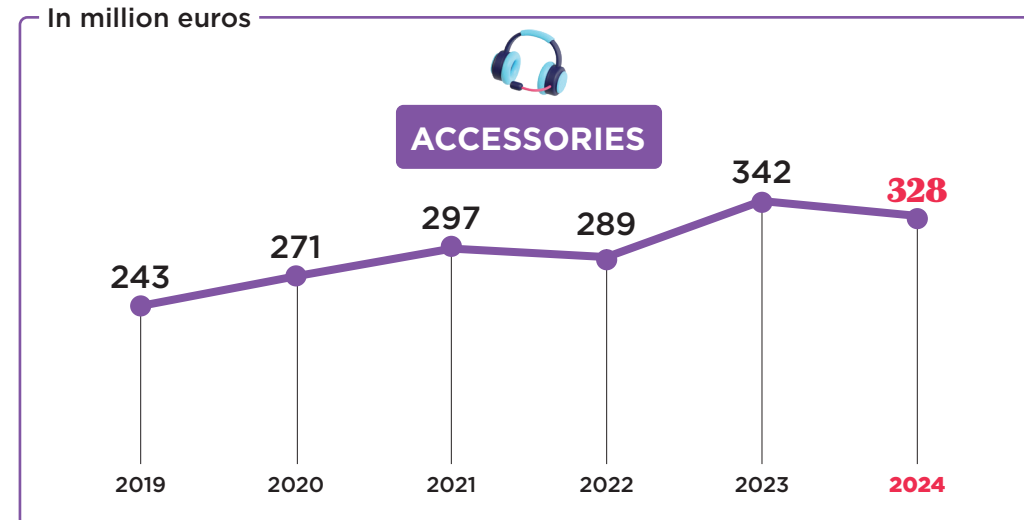
BREAKDOWN OF SALES FOR COMPLETE GAMES 2024



CHANGE IN 2024 SALES



CHANGE IN 2024 SALES



Top 5 accessories

IN VALUE			IN VOLUME			
	CONTROLLERS	-8% VS 2023	1		CONTROLLERS	-12% VS 2023
	HEADSETS AND AUDIO ACCESSORIES	= VS 2023	2		HEADSETS AND AUDIO ACCESSORIES	-4% VS 2023
	MISCELLANEOUS ACCESSORIES	+91% VS 2023	3		MISCELLANEOUS ACCESSORIES	+5% VS 2023
	STEERING WHEELS	-22% VS 2023	4		CHARGERS	-20% VS 2023
	VR & DISPLAY	+17% VS 2023	5		STORAGE	-29% VS 2023

TOP 20 GAMES IN 2024 ACROSS ALL CONSOLES

Physical MARKET in value

1	EA Sports FC 25 Electronic Arts 44,545,056 €	2	Call of Duty: Black Ops 6 Activision Blizzard 30,047,733 €	3	Super Mario Party Jamboree Nintendo 14,686,929 €
4	Mario Kart 8 Deluxe	Nintendo	13,093,165€		
5	Dragon Ball: Sparking! Zero	Bandai Namco Entertainment	11,563,272€		
6	The Legend of Zelda: Echoes of Wisdom	Nintendo	11,374,572€		
7	Super Mario Bros. Wonder	Nintendo	10,509,042€		
8	EA Sports FC 24	Electronic Arts	9,864,023€		
9	Hogwarts Legacy	Warner Bros. Games	7,473,508€		
10	Final Fantasy VII Rebirth	Square Enix	7,307,925€		
11	Princess Peach: Showtime!	Nintendo	7,155,133€		
12	Astro Bot	Sony Interactive Entertainment	6,458,844€		
13	Luigi's Mansion 2 HD	Nintendo	6,212,609€		
14	Star Wars Outlaws	Ubisoft	5,556,132€		
15	Animal Crossing: New Horizons	Nintendo	5,392,679€		
16	The Legend of Zelda: Tears of the Kingdom	Nintendo	5,178,625€		
17	Marvel's Spider-Man 2	Sony Interactive Entertainment	5,169,915€		
18	Minecraft: Nintendo Switch Edition	Mojang	5,151,403€		
19	Gran Turismo Sport	Sony Interactive Entertainment	4,801,306€		
20	NBA 2K25	Take-Two Interactive	4,426,466€		

TOP 20 GAMES IN 2024 ACROSS ALL CONSOLES

Physical MARKET in volume

1	EA Sports FC 25 Electronic Arts 736,691 units	2	Call of Duty: Black Ops 6 Activision Blizzard 454,571 units	3	Super Mario Party Jamboree Nintendo 309,015 units
4	Mario Kart 8 Deluxe	Nintendo	271,918 units		
5	The Legend of Zelda: Echoes of Wisdom	Nintendo	236,789 units		
6	Super Mario Bros. Wonder	Nintendo	217,518 units		
7	Minecraft: Nintendo Switch Edition	Mojang	204,845 units		
8	EA Sports FC 24	Electronic Arts	204,295 units		
9	Hogwarts Legacy	Warner Bros. Games	169,875 units		
10	Dragon Ball: Sparking! Zero	Bandai Namco Entertainment	166,237 units		
11	Princess Peach: Showtime!	Nintendo	148,825 units		
12	Grand Theft Auto V	Take-Two Interactive	145,158 units		
13	Luigi's Mansion 2 HD	Nintendo	127,917 units		
14	Animal Crossing: New Horizons	Nintendo	113,267 units		
15	Astro Bot	Sony Interactive Entertainment	110,065 units		
16	Nintendo Switch Sports	Nintendo	106,215 units		
17	Mario vs. Donkey Kong	Nintendo	105,084 units		
18	Final Fantasy VII Rebirth	Square Enix	102,111 units		
19	The Legend of Zelda: Tears of the Kingdom	Nintendo	94,348 units		
20	Mario & Luigi: Brotherhood	Nintendo	90,901 units		

TOP 20 GAMES IN 2024 ACROSS ALL CONSOLES

Physical and digital **MARKET** in value 📈📉

1	EA Sports FC 25 Electronic Arts 94,859,903 €	2	Call of Duty: Black Ops 6 Activision Blizzard 67,033,815 €	3	Dragon Ball: Sparking! Zero Bandai Namco Entertainment 27,190,420 €
4	EA Sports FC 24	Electronic Arts	18,126,493€		
5	Super Mario Party Jamboree	Nintendo	14,686,929€		
6	Hogwarts Legacy	Warner Bros. Games	13,846,272€		
7	Mario Kart 8 Deluxe	Nintendo	13,093,165€		
8	Call of Duty: Modern Warfare III	Activision Blizzard	12,160,335€		
9	The Legend of Zelda: Echoes of Wisdom	Nintendo	11,374,572€		
10	Super Mario Bros. Wonder	Nintendo	10,509,042€		
11	NBA 2K25	Take-Two Interactive	10,000,621€		
12	Final Fantasy VII Rebirth	Square Enix	9,818,180€		
13	Star Wars Outlaws	Ubisoft	8,995,138€		
14	Astro Bot	Sony Interactive Entertainment	8,736,670€		
15	Marvel's Spider-Man 2	Sony Interactive Entertainment	8,225,789€		
16	Gran Turismo 7	Sony Interactive Entertainment	8,194,517€		
17	Grand Theft Auto V	Take-Two Interactive	8,033,475€		
18	Elden Ring	Bandai Namco Entertainment	7,539,627€		
19	TopSpin 2K25	Take-Two Interactive	7,494,989€		
20	The Crew Motorfest	Ubisoft	7,396,089€		

TOP 20 GAMES IN 2024 ACROSS ALL CONSOLES

Physical + digital **MARKET** in volume 📈📉

1	EA Sports FC 25 Electronic Arts 1,417,535 units	2	Call of Duty: Black Ops 6 Activision Blizzard 906,312 units	3	EA Sports FC 24 Electronic Arts 504,687 units
4	Hogwarts Legacy	Warner Bros. Games	379,735 units		
5	Grand Theft Auto V	Take-Two Interactive	372,369 units		
6	Dragon Ball: Sparking! Zero	Bandai Namco Entertainment	329,171 units		
7	Super Mario Party Jamboree	Nintendo	309,015 units		
8	Mario Kart 8 Deluxe	Nintendo	271,918 units		
9	The Legend of Zelda: Echoes of Wisdom	Nintendo	236,789 units		
10	Super Mario Bros. Wonder	Nintendo	217,518 units		
11	Minecraft: Nintendo Switch Edition	Mojang	204,845 units		
12	Call of Duty: Modern Warfare III	Activision Blizzard	194,582 units		
13	The Crew Motorfest	Ubisoft	179,648 units		
14	Grand Theft Auto Online	Take-Two Interactive	176,125 units		
15	Red Dead Redemption 2	Take-Two Interactive	163,840 units		
16	The Last of Us Part II Remastered	Sony Interactive Entertainment	161,013 units		
17	NBA 2K25	Take-Two Interactive	156,852 units		
18	Princess Peach: Showtime!	Nintendo	148,825 units		
19	Astro Bot	Sony Interactive Entertainment	142,677 units		
20	Gran Turismo 7	Sony Interactive Entertainment	141,759 units		

TOP 20 GAMES IN 2024 PER CONSOLE

Physical MARKET in value

1	EA Sports FC 25 Electronic Arts 25,944,214 €	PS5	2	Call of Duty: Black Ops 6 Activision Blizzard €24,633,488	PS5	3	Super Mario Party Jamboree Nintendo 14,686,929 €	SWITCH
4	Mario Kart 8 Deluxe	SWITCH		Nintendo		13,093,165€		
5	The Legend of Zelda: Echoes of Wisdom	SWITCH		Nintendo		11,374,572€		
6	Dragon Ball: Sparking! Zero	PS5		Bandai Namco Entertainment		10,768,607€		
7	Super Mario Bros. Wonder	SWITCH		Nintendo		10,509,042€		
8	EA Sports FC 25	PS4		Electronic Arts		9,145,536€		
9	Final Fantasy VII Rebirth	PS5		Square Enix		7,307,925€		
10	Princess Peach: Showtime!	SWITCH		Nintendo		7,155,133€		
11	EA Sports FC 25	SWITCH		Electronic Arts		6,998,139€		
12	Astro Bot	PS5		Sony Interactive Entertainment		6,458,844€		
13	Luigi's Mansion 2 HD	SWITCH		Nintendo		6,212,609€		
14	Animal Crossing: New Horizons	SWITCH		Nintendo		5,392,679€		
15	The Legend of Zelda: Tears of the Kingdom	SWITCH		Nintendo		5,178,625€		
16	Marvel's Spider-Man 2	PS5		Sony Interactive Entertainment		5,169,915€		
17	Minecraft: Nintendo Switch Edition	SWITCH		Mojang		5,151,403€		
18	Star Wars Outlaws	PS5		Ubisoft		4,826,749€		
19	Mario & Luigi: Brothership	SWITCH		Nintendo		4,369,615€		
20	Mario vs. Donkey Kong	SWITCH		Nintendo		4,263,581€		

TOP 20 GAMES IN 2024 PER CONSOLE

Physical MARKET in volume

1	EA Sports FC 25 Electronic Arts 403,272 units	PS5	2	Call of Duty: Black Ops 6 Activision Blizzard 371,583 units	PS5	3	Super Mario Party Jamboree Nintendo 309,015 units	SWITCH
4	Mario Kart 8 Deluxe	SWITCH		Nintendo		271,918 units		
5	The Legend of Zelda: Echoes of Wisdom	SWITCH		Nintendo		236,789 units		
6	Super Mario Bros. Wonder	SWITCH		Nintendo		217,518 units		
7	Minecraft: Nintendo Switch Edition	SWITCH		Mojang		204,845 units		
8	Dragon Ball: Sparking! Zero	PS5		Bandai Namco Entertainment		154,979 units		
9	EA Sports FC 25	SWITCH		Electronic Arts		148,968 units		
10	Princess Peach: Showtime!	SWITCH		Nintendo		148,825 units		
11	EA Sports FC 25	PS4		Electronic Arts		144,745 units		
12	Luigi's Mansion 2 HD	SWITCH		Nintendo		127,917 units		
13	Animal Crossing: New Horizons	SWITCH		Nintendo		113,267 units		
14	Astro Bot	PS5		Sony Interactive Entertainment		110,065 units		
15	Nintendo Switch Sports	SWITCH		Nintendo		106,215 units		
16	Mario vs. Donkey Kong	SWITCH		Nintendo		105,084 units		
17	Final Fantasy VII Rebirth	PS5		Square Enix		102,111 units		
18	The Legend of Zelda: Tears of the Kingdom	SWITCH		Nintendo		94,348 units		
19	Hogwarts Legacy	SWITCH		Warner Bros. Games		92,333 units		
20	Mario & Luigi: Brothership	SWITCH		Nintendo		90,901 units		

TOP 20 GAMES IN 2024 PER CONSOLE

Physical and digital MARKET in value 📈📉

1	EA Sports FC 25 Electronic Arts 69,554,391 €	PS5	2	Call of Duty: Black Ops 6 Activision Blizzard €57,081,397	PS5	3	Dragon Ball: Sparking! Zero Bandai Namco Entertainment €23,759,665	PS5
4	Super Mario Party Jamboree	SWITCH		Nintendo			14,686,929€	
5	Mario Kart 8 Deluxe	SWITCH		Nintendo			13,093,165€	
6	The Legend of Zelda: Echoes of Wisdom	SWITCH		Nintendo			11,374,572€	
7	Super Mario Bros. Wonder	SWITCH		Nintendo			10,509,042€	
8	EA Sports FC 24	PS5		Electronic Arts			10,101,050€	
9	Final Fantasy VII Rebirth	PS5		Square Enix			9,818,180€	
10	EA Sports FC 25	PS4		Electronic Arts			9,145,536€	
11	Astro Bot	PS5		Sony Interactive Entertainment			8,736,670€	
12	EA Sports FC 25	XBOX SERIES		Electronic Arts			8,408,861€	
13	Marvel's Spider-Man 2	PS5		Sony Interactive Entertainment			8,225,789€	
14	EA Sports FC 25	SWITCH		Electronic Arts			7,751,115€	
15	Star Wars Outlaws	PS5		Ubisoft			7,515,830€	
16	Call of Duty: Modern Warfare III	PS5		Activision Blizzard			7,319,863€	
17	NBA 2K25	PS5		Take-Two Interactive			7,226,925€	
18	Princess Peach: Showtime!	SWITCH		Nintendo			7,155,133€	
19	Gran Turismo 7	PS5		Sony Interactive Entertainment			6,501,198€	
20	Call of Duty: Black Ops 6	PS4		Activision Blizzard			6,410,625€	

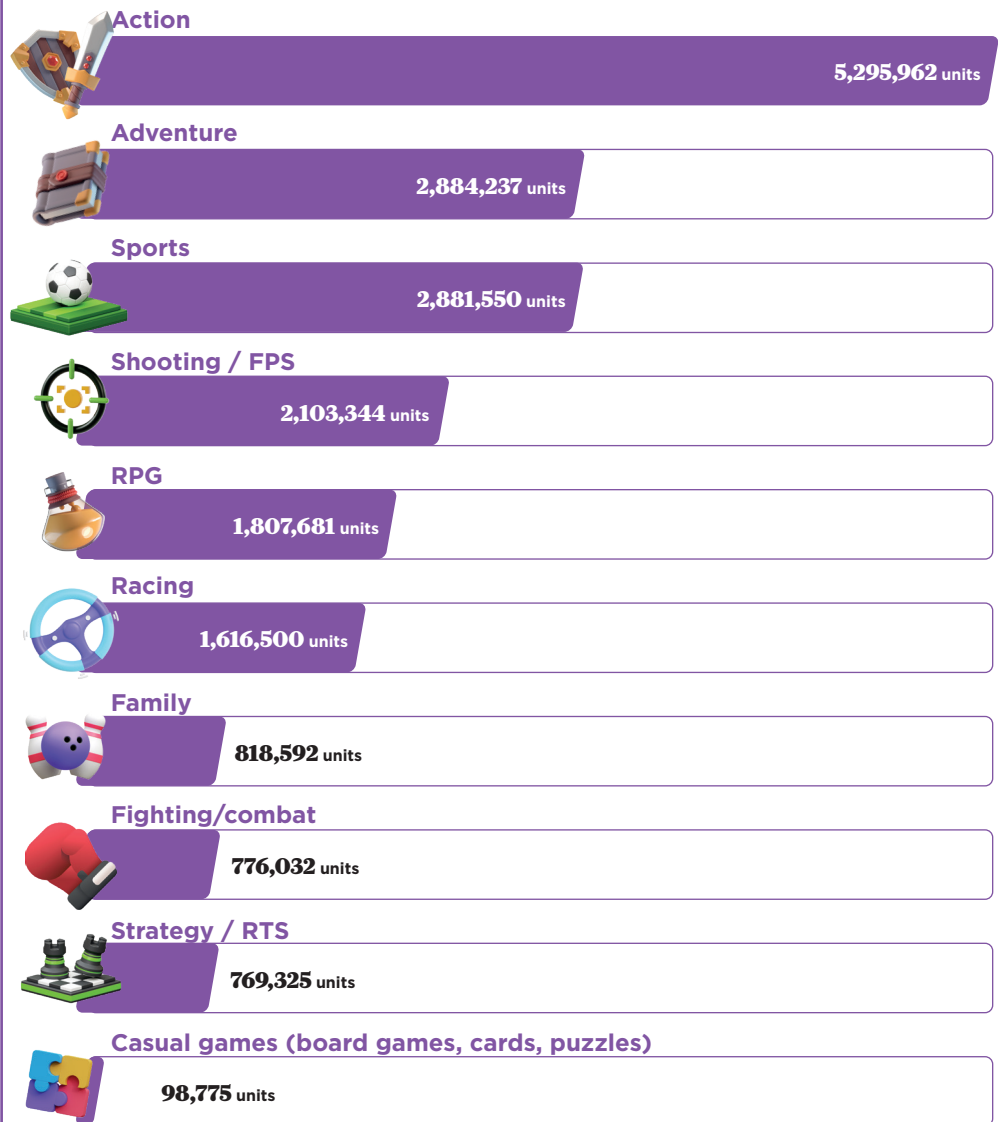
TOP 20 GAMES IN 2024 PER CONSOLE

Physical + digital MARKET in volume 📈📉

1	EA Sports FC 25 Electronic Arts 985,262 units	PS5	2	Call of Duty: Black Ops 6 Activision Blizzard 767,780 units	PS5	3	Super Mario Party Jamboree Nintendo 309,015 units	SWITCH
4	Dragon Ball: Sparkling! Zero	PS5		Bandai Namco Entertainment			291,230 units	
5	EA Sports FC 24	PS5		Electronic Arts			278,963 units	
6	Mario Kart 8 Deluxe	SWITCH		Nintendo			271,918 units	
7	The Legend of Zelda: Echoes of Wisdom	SWITCH		Nintendo			236,789 units	
8	Super Mario Bros. Wonder	SWITCH		Nintendo			217,518 units	
9	Minecraft: Nintendo Switch Edition	SWITCH		Mojang			204,845 units	
10	Grand Theft Auto V	PS5		Take-Two Interactive			182,698 units	
11	Grand Theft Auto Online	PS5		Take-Two Interactive			176,125 units	
12	EA Sports FC 25	SWITCH		Electronic Arts			165,056 units	
13	The Last of Us Part II Remastered	PS5		Sony Interactive Entertainment			161,013 units	
14	Hogwarts Legacy	SWITCH		Warner Bros. Games			157,676 units	
15	Princess Peach: Showtime!	SWITCH		Nintendo			148,825 units	
16	EA Sports FC 25	PS4		Electronic Arts			144,745 units	
17	Astro Bot	PS5		Sony Interactive Entertainment			142,677 units	
18	Helldivers 2	PS5		Sony Interactive Entertainment			137,882 units	
19	Final Fantasy VII Rebirth	PS5		Square Enix			134,381 units	
20	Red Dead Redemption 2	PS4		Take-Two Interactive			132,207 units	

TOP 10 TYPES OF VIDEO GAMES BOUGHT IN 2024

Physical + digital MARKET in volume 🎮👁️



SYNDICAT
DES EDITEURS
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TOP WEEKLY SALES

Every Monday, discover
the top video game sales in France

SELL.FR

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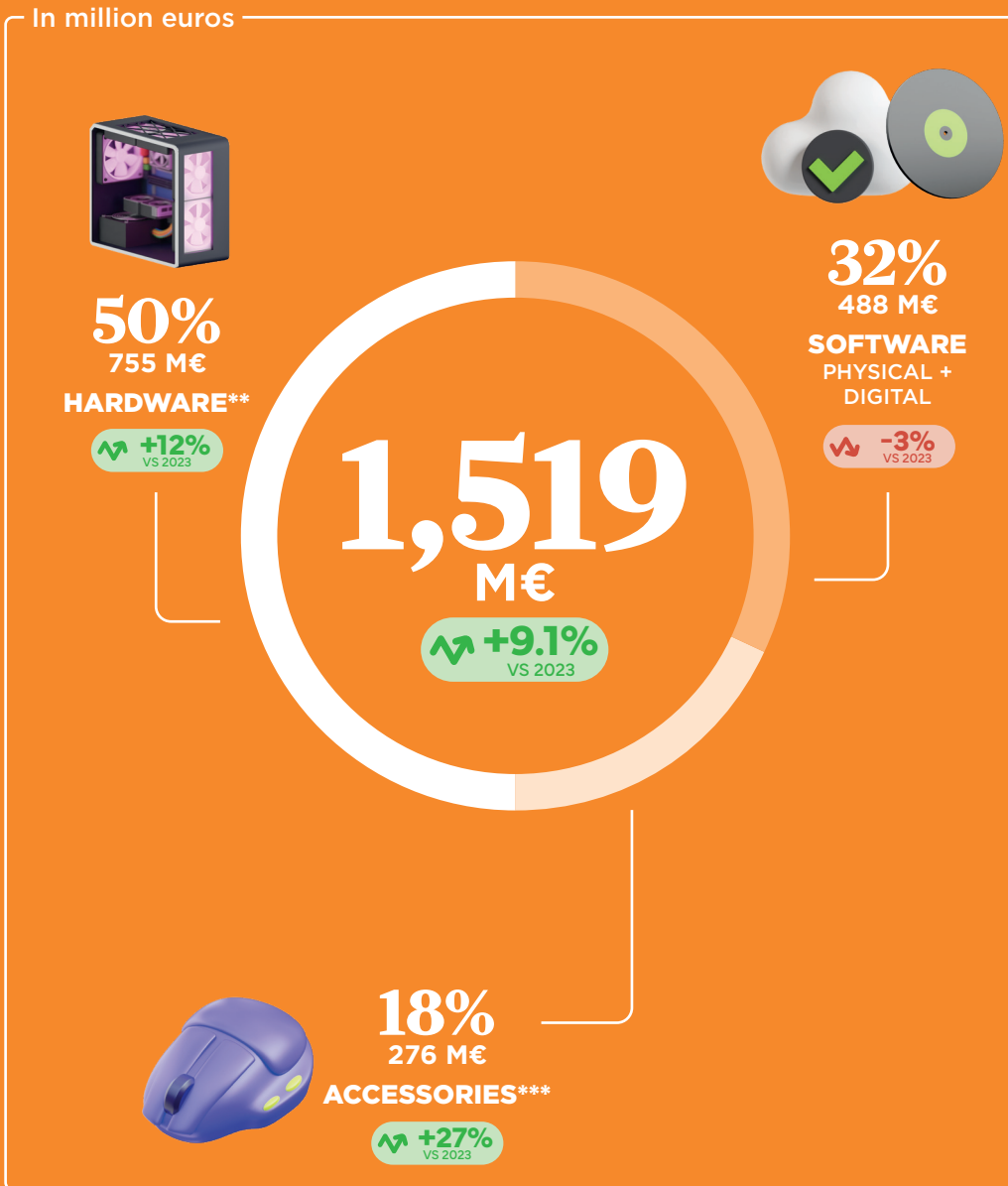


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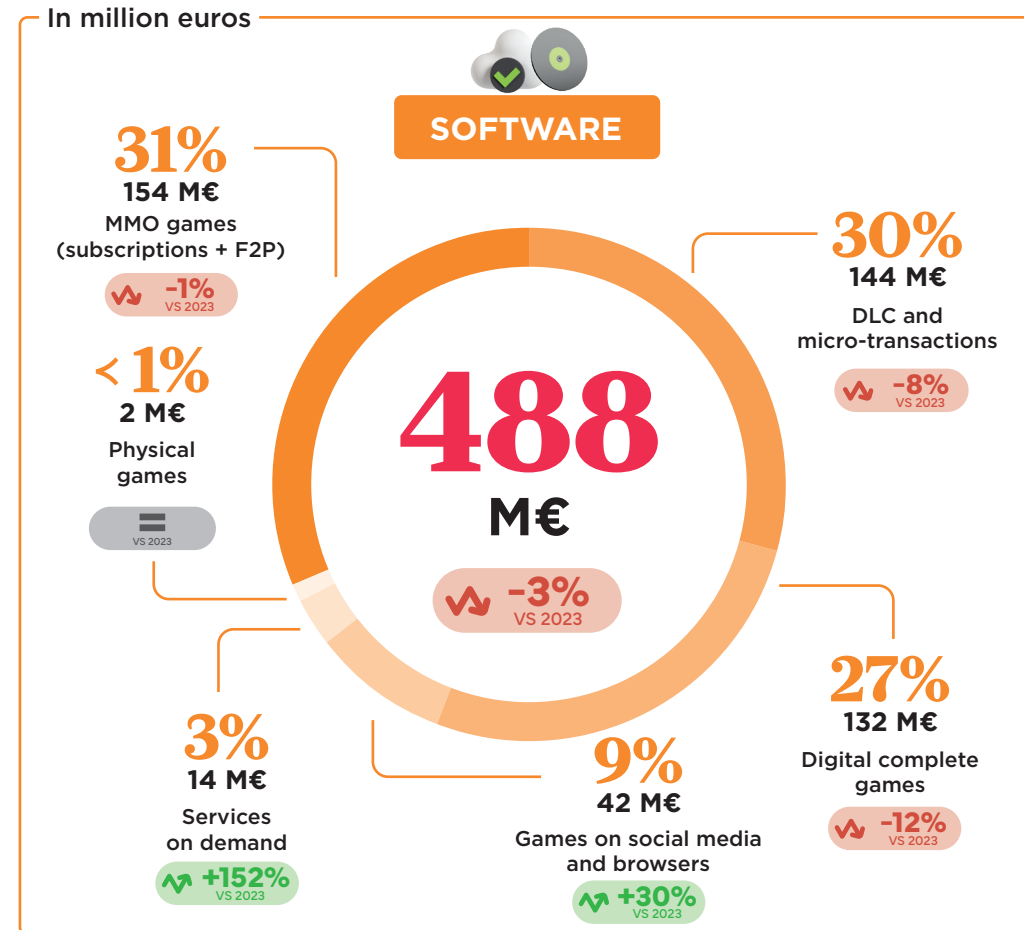


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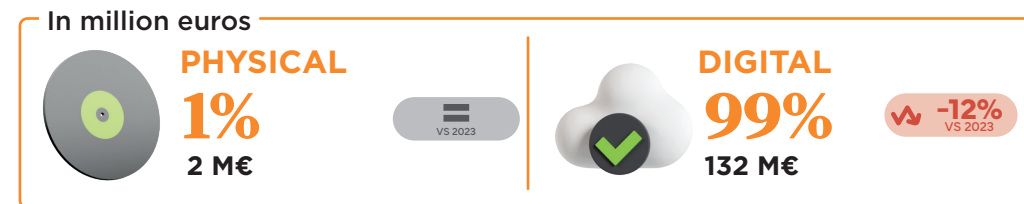
BREAKDOWN OF 2024 SALES*



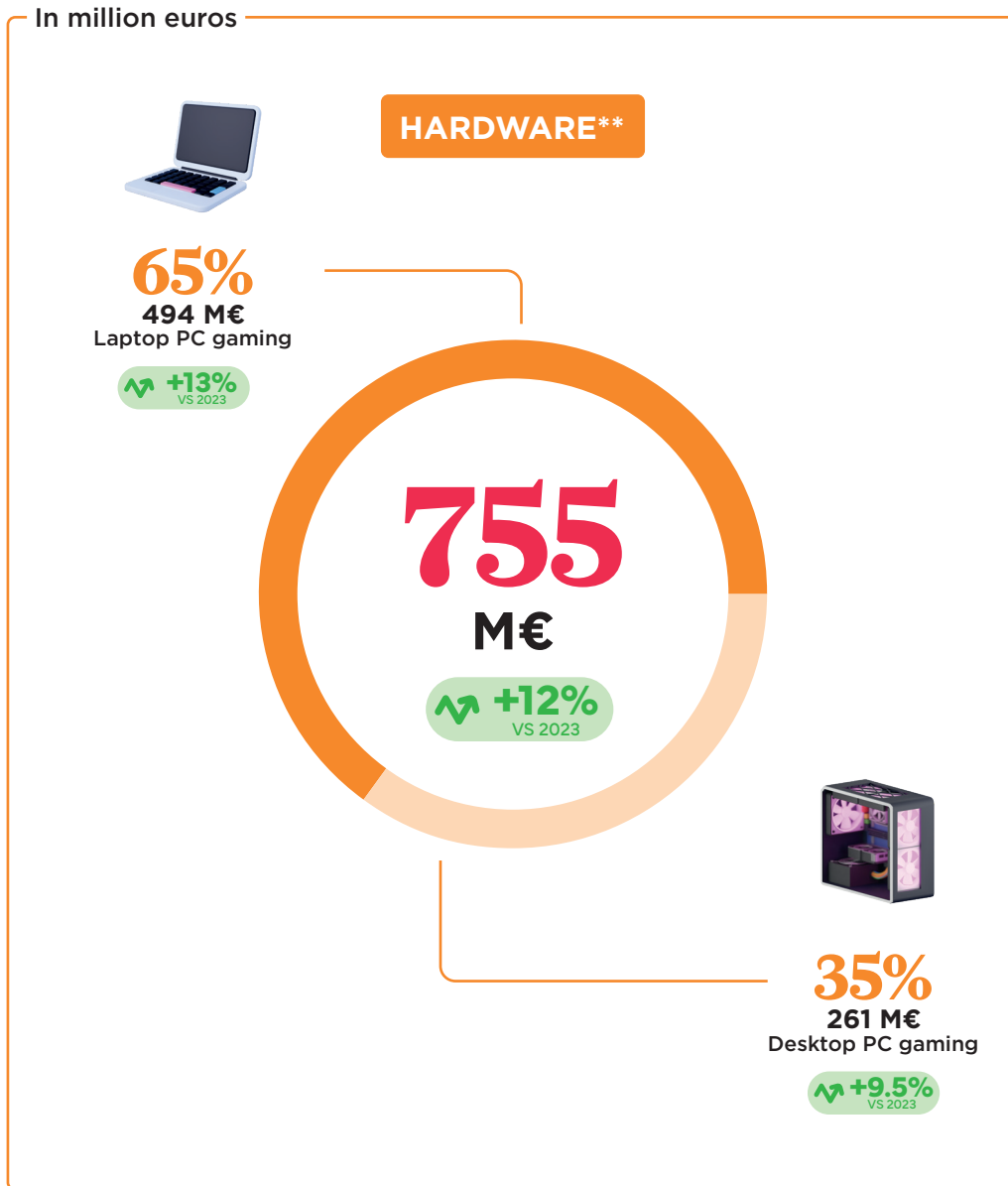
BREAKDOWN OF 2024 SALES



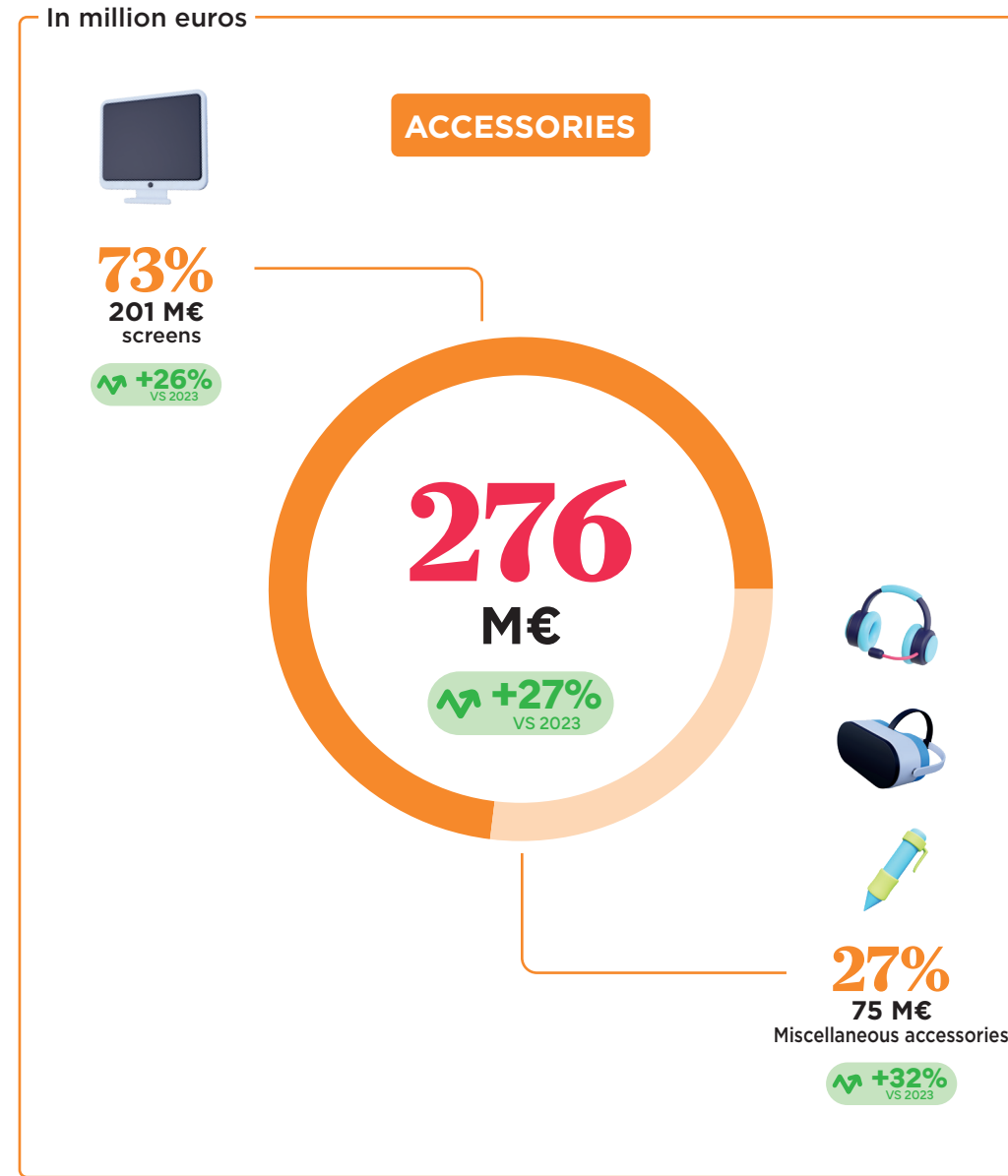
BREAKDOWN OF SALES FOR COMPLETE GAMES 2024



BREAKDOWN OF 2024 SALES*



BREAKDOWN OF 2024 SALES*



Sources: SELL data, from IDC panels at end 2024. *Revised historical PC Gaming 2023 hardware data. **Sales of PCs fitted with a high-performance graphics card.

Sources: SELL data, from GSD/IDC panels at end 2024. *Mouse, keyboards, screens dedicated to PC gaming.

TOP 20 PC GAMES IN 2024

Physical and digital MARKET in value 🎮🎮

1	Call of Duty: Black Ops 6 Activision Blizzard 13,491,299 €	2	EA Sports FC 25 Electronic Arts 5,976,460 €	3	Helldivers 2 Sony Interactive Entertainment 4,103,992 €
4	Call of Duty: Modern Warfare III	Activision Blizzard	3,357,041€		
5	Dragon Ball: Sparking! Zero	Bandai Namco Entertainment	2,269,694€		
6	Elden Ring	Bandai Namco Entertainment	2,254,807€		
7	Warhammer 40,000: Space Marine II	Focus Entertainment Publishing	2,159,225€		
8	Grand Theft Auto V	Take-Two Interactive	2,068,527€		
9	Sea of Thieves	Microsoft	1,693,041€		
10	Red Dead Redemption 2	Take-Two Interactive	1,530,505€		
11	Diablo IV	Activision Blizzard	1,375,313€		
12	Dragon's Dogma II	Capcom	1,329,974€		
13	Dragon Age: The Veilguard	Electronic Arts	1,324,831€		
14	Hogwarts Legacy	Warner Bros. Games	1,227,871€		
15	EA Sport FC 24	Electronic Arts	1,127,584€		
16	Age of Mythology: Retold	Microsoft	1,104,108€		
17	F1 24	Electronic Arts	1,082,989€		
18	Ghost of Tsushima: Director's Cut	Sony Interactive Entertainment	1,082,010€		
19	Star Wars Outlaws	Ubisoft	958,683€		
20	Farming Simulator 25	Giants Software	894,799€		

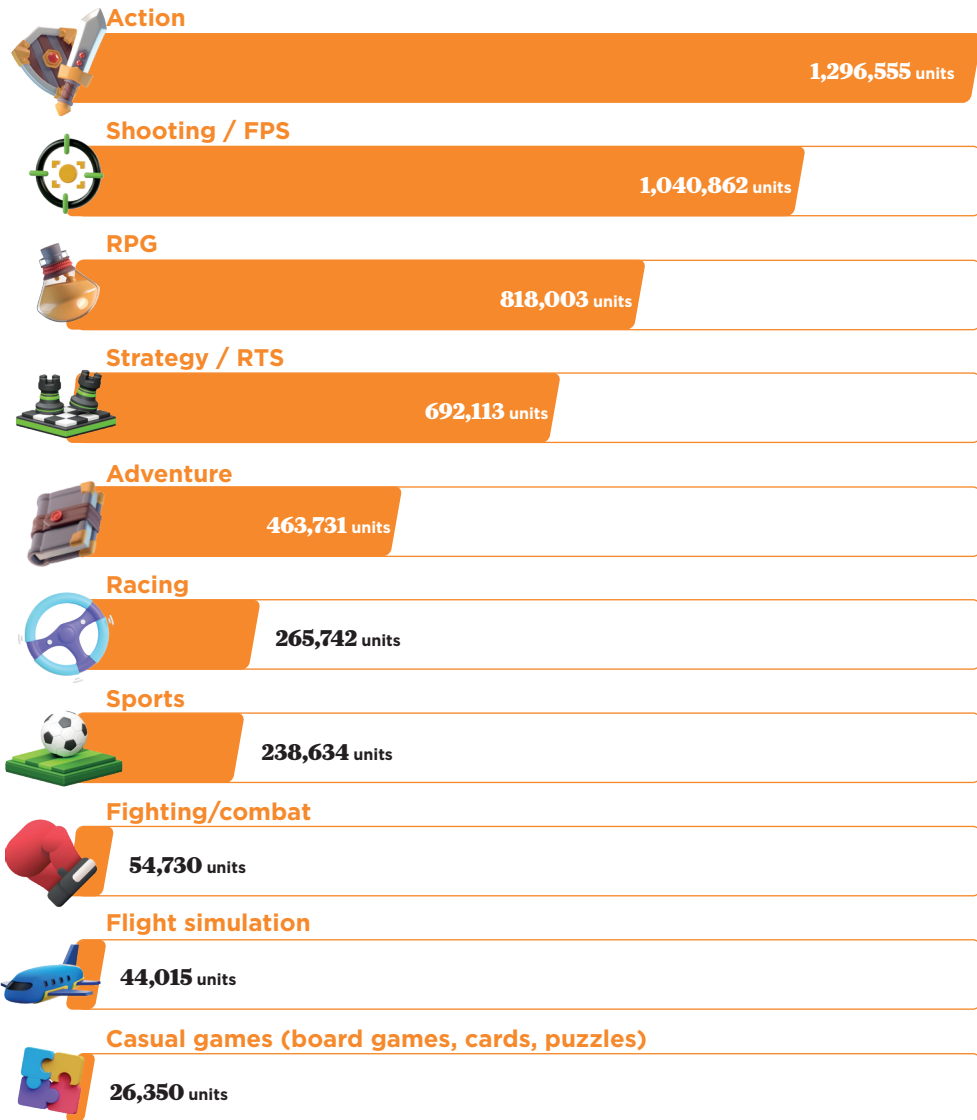
TOP 20 PC GAMES IN 2024

Physical + digital MARKET in volume 🎮🎮

1	Call of Duty: Black Ops 6 Activision Blizzard 163,172 units	2	Helldivers 2 Sony Interactive Entertainment 124,557 units	3	Grand Theft Auto V Take-Two Interactive 107,041 units
4	EA Sports FC 25	Electronic Arts	90,286 units		
5	Sea of Thieves	Microsoft	73,032 units		
6	EA Sports FC 24	Electronic Arts	60,477 units		
7	Red Dead Redemption 2	Take-Two Interactive	60,016 units		
8	Call of Duty: Modern Warfare III	Activision Blizzard	57,132 units		
9	Command & Conquer: Generals	Electronic Arts	48,276 units		
10	Hogwarts Legacy	Warner Bros. Games	47,231 units		
11	Sid Meier's Civilization VI	Take-Two Interactive	41,534 units		
12	It Takes Two	Electronic Arts	41,291 units		
13	The Crew 2	Ubisoft	40,530 units		
14	Elden Ring	Bandai Namco Entertainment	39,953 units		
15	Fallout 4	Bethesda Softworks	39,123 units		
16	Kingdom Come: Deliverance	Deep Silver	36,976 units		
17	Warhammer 40,000: Space Marine II	Focus Entertainment Publishing	36,547 units		
18	Age of Mythology: Retold	Microsoft	36,058 units		
19	Tom Clancy's Rainbow Six Siege	Ubisoft	35,049 units		
20	Star Wars Jedi: Fallen Order	Electronic Arts	34,630 units		

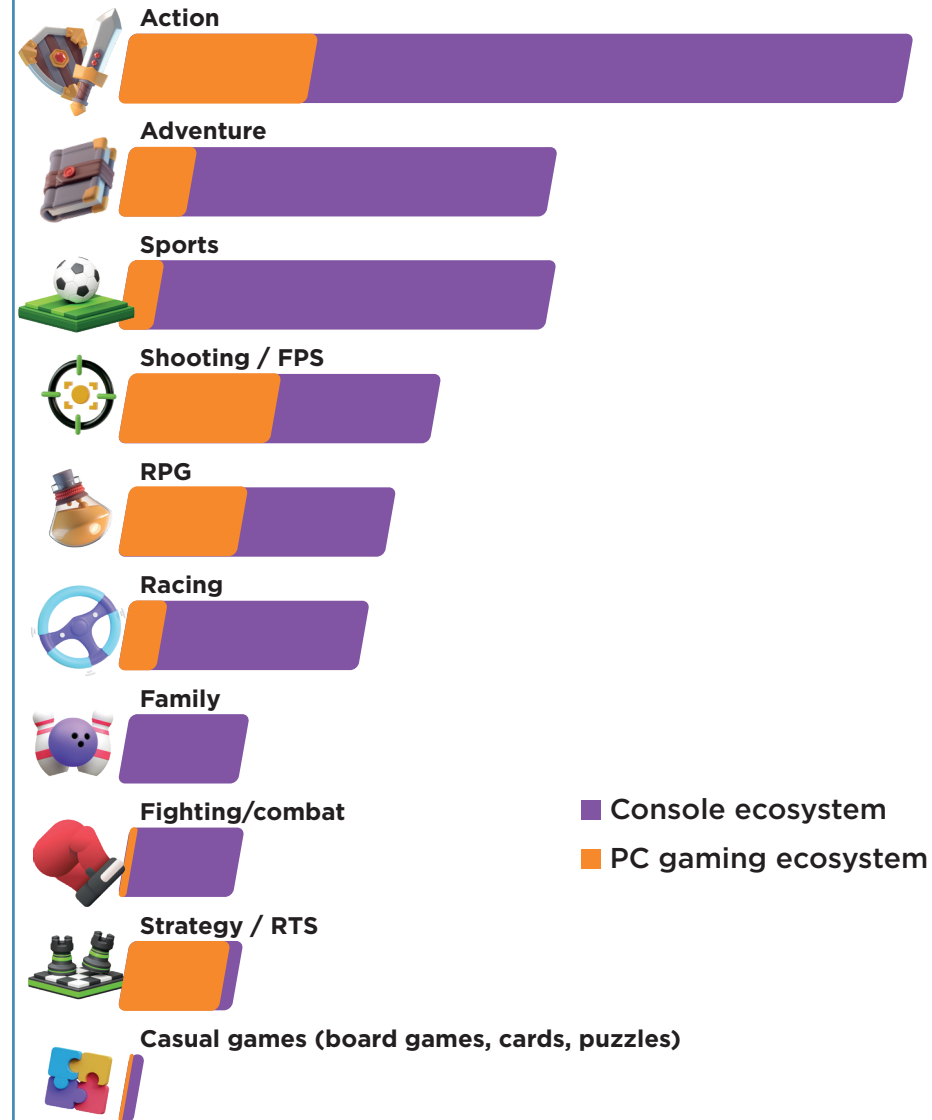
TOP 10 TYPES OF VIDEO GAMES BOUGHT IN 2024

Physical and digital MARKET in volume 🎮🖥️



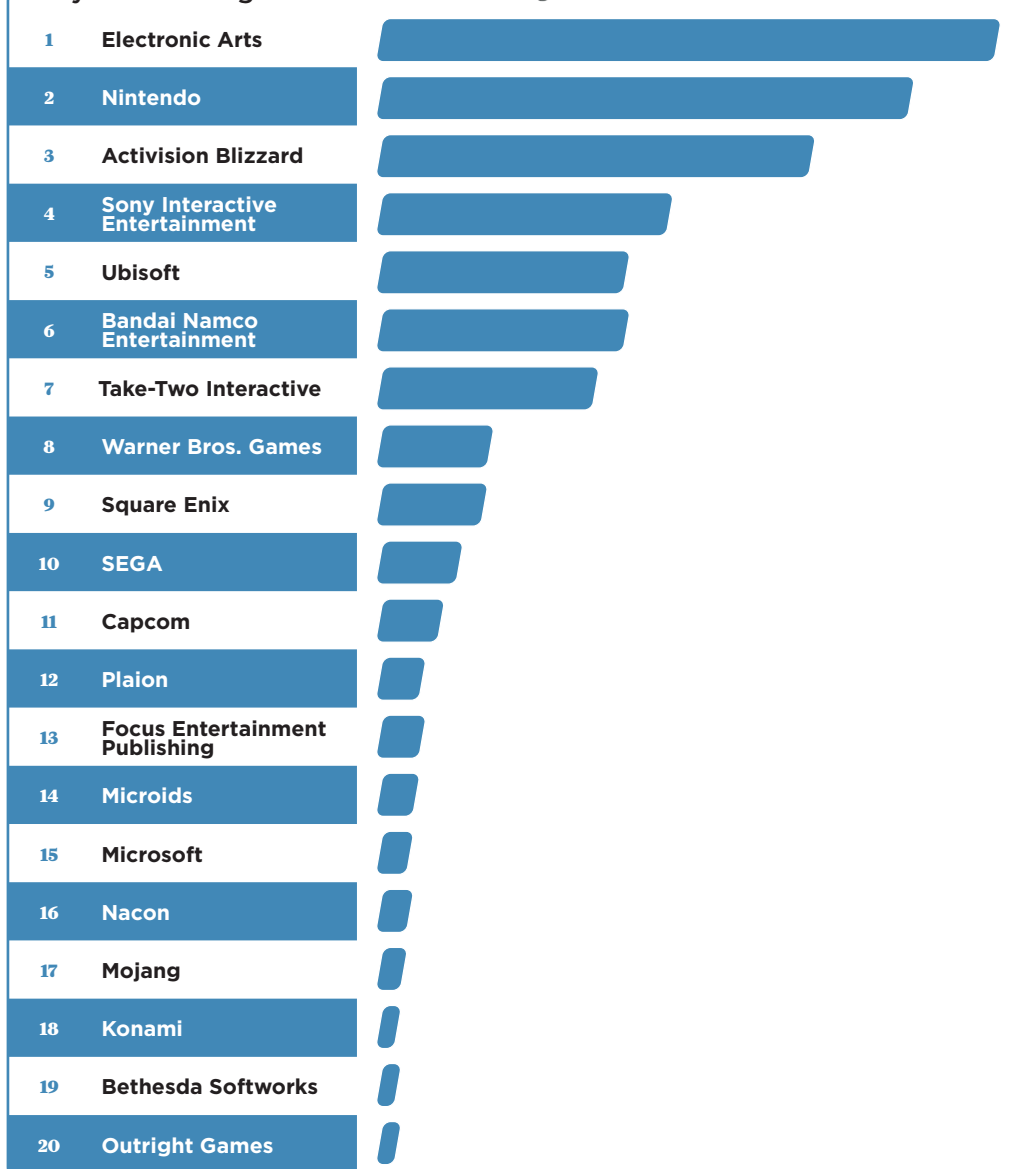
TOP 10 TYPES OF VIDEO GAMES BOUGHT IN 2024

Comparing the PC GAMING ECOSYSTEM and the CONSOLE ECOSYSTEM



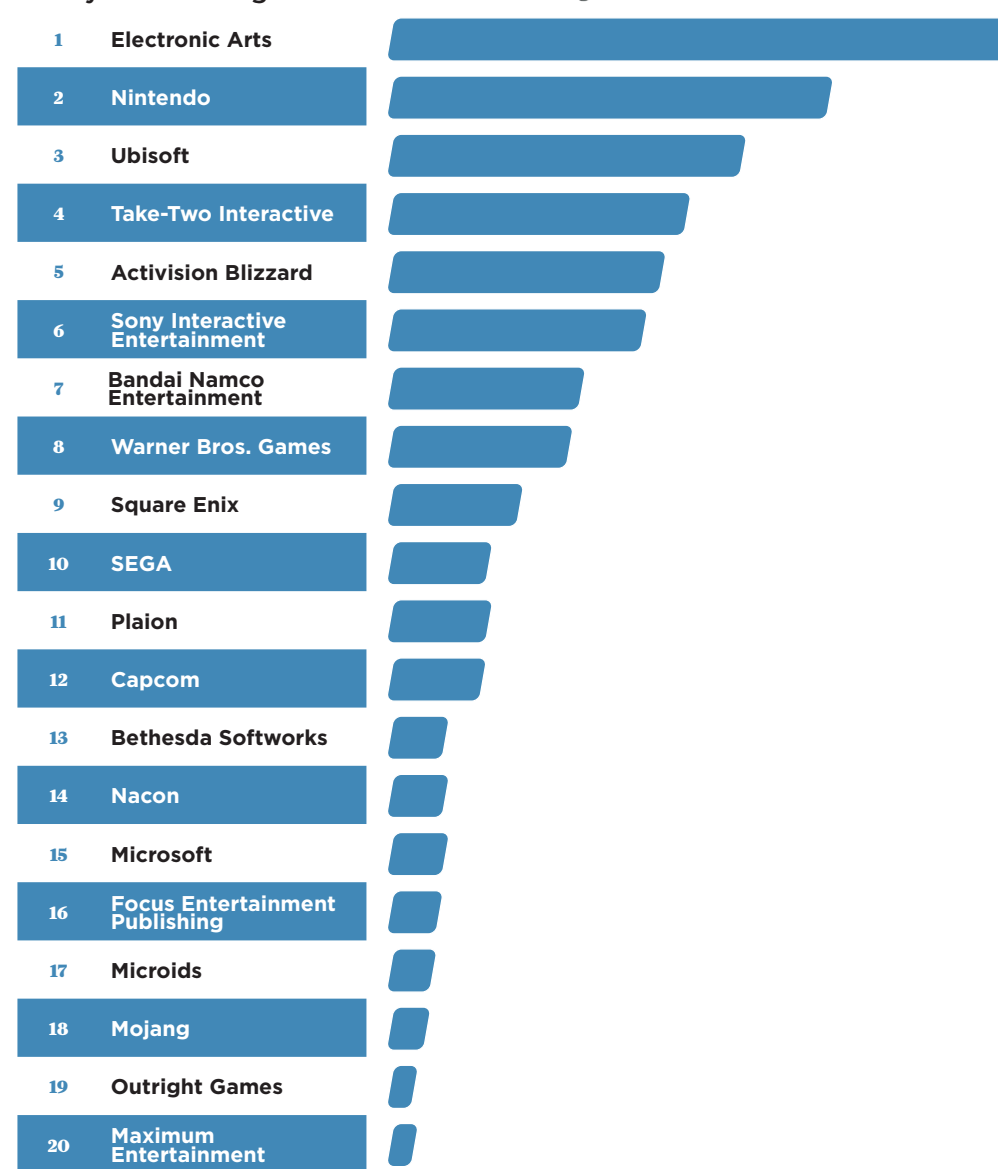
TOP 20 PUBLISHERS CONSOLE + PC GAMING SOFTWARE

Physical and digital MARKET in value 🌐 🌐



TOP 20 PUBLISHERS CONSOLE + PC GAMING SOFTWARE

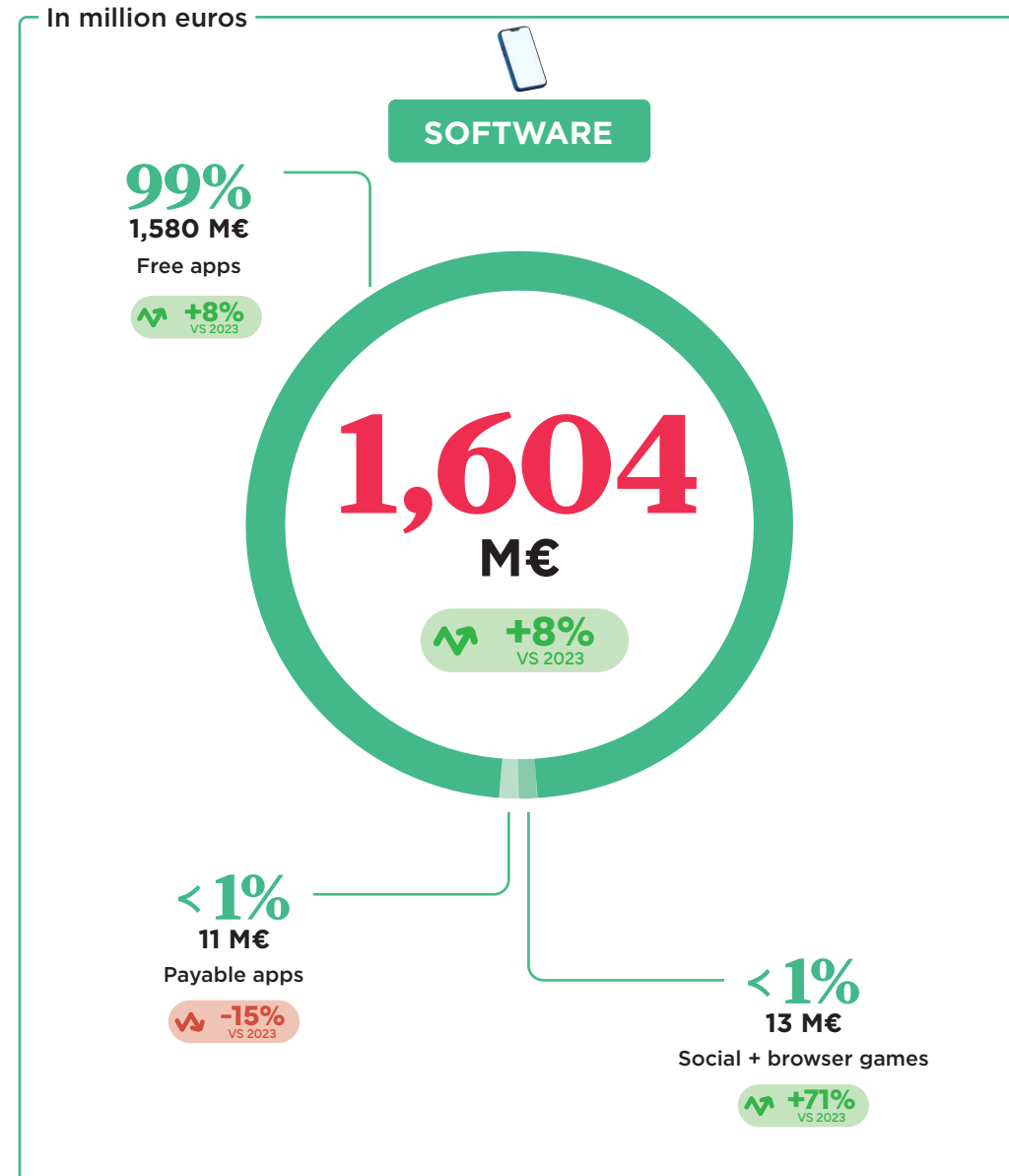
Physical and digital MARKET in volume 🌐 🌐



CHANGE IN 2024 SALES



BREAKDOWN OF 2024 SALES













TOP 10 FREE MOBILE GAMES

In value* (consumer spending)

1		MONOPOLY GO!	Scopely	104,261,040€
2		Coin Master	Moon Active	103,151,880€
3		Brawl Stars	Supercell	64,331,280€
4		Royal Match	Dream Games	43,257,240€
5		Candy Crush Saga	King Digital Entertainment	41,038,920€
6		Last War:Survival	First Fun Games	32,165,640€
7		Pokémon TCG Pocket	The Pokémon Company	29,947,320€
8		Roblox	Roblox Corporation	25,510,680€
9		Whiteout Survival	Century Games	25,510,680€
10		Clash of Clans	Supercell	23,292,360€











TOP 10 FREE MOBILE GAMES

In volume (number of downloads)

1		Brawl Stars	Supercell	5,600,000 units
2		Pokémon TCG Pocket	The Pokémon Company	5,000,000 units
3		Roblox	Roblox Corporation	4,100,000 units
4		Block Blast	Hungry Studio	3,800,000 units
5		Games without WiFi - without the internet	Moreno Maio	3,100,000 units
6		Last War:Survival	First Fun Games	2,800,000 units
7		Royal Match	Dream Games	2,800,000 units
8		Pizza Ready	Supercent	2,700,000 units
9		MONOPOLY GO!	Scopely	2,700,000 units
10		Subway Surfers	Sybo Games	2,600,000 units











TOP 10 PAID MOBILE GAMES

In value* (consumer spending)

1		Minecraft	Mojang	1,464,091€
2		Balatro	Playstack	369,350€
3		RFS Real Flight Simulator	RORTOS	171,920€
4		Animal Crossing: Pocket Camp C	Nintendo	148,627€
5		MONOPOLY: The Board Game	Marmalade Game Studio	149,737€
6		Farming Simulator 23 Mobile	GIANTS Software	136,427€
7		Evertale	ZigZaGame	126,444€
8		Kingdom Rush 5: TD Alliance	Ironhide Game Studio	122,008€
9		Slay the Spire	Humble Bundle	87,624€
10		Bloons TD 6	Ninja Kiwi	83,187€

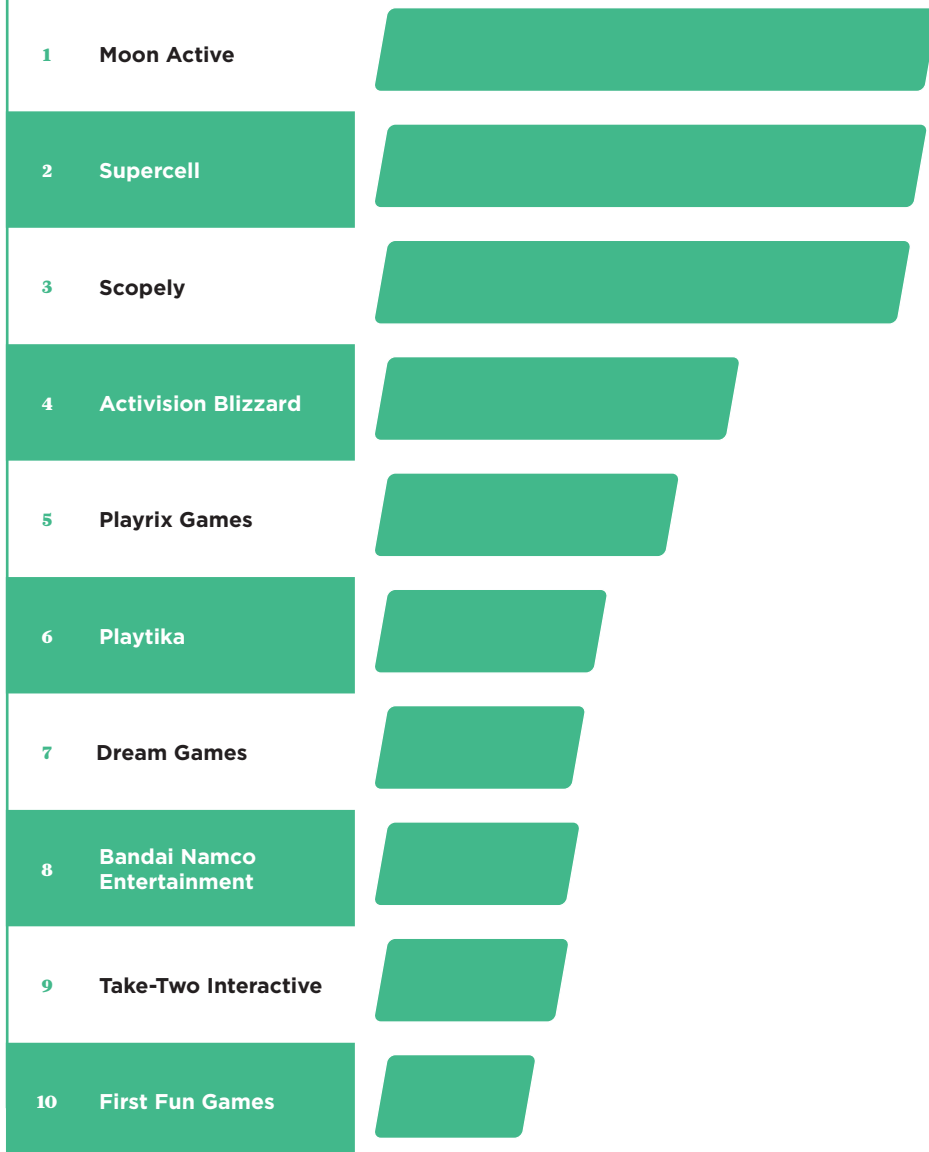
TOP 10 PAID MOBILE GAMES

In volume (number of downloads)

1		Minecraft	Mojang	170,000 units
2		Geometry Dash	RobTop Games	49,000 units
3		MONOPOLY: The Board Game	Marmalade Game Studio	27,000 units
4		Street Kart #1 Go Kart Game	Fat Cigar Productions	27,000 units
5		Stardew Valley	Concerned Ape	22,000 units
6		Balatro	Playstack	17,000 units
7		RFS Real Flight Simulator	RORTOS	15,000 units
8		The Past Within	Rusty Lake	15,000 units
9		Bloom Sort	Lion Studios Plus	13,000 units
10		Grand Theft Auto: San Andreas	Rockstar Games	11,000 units

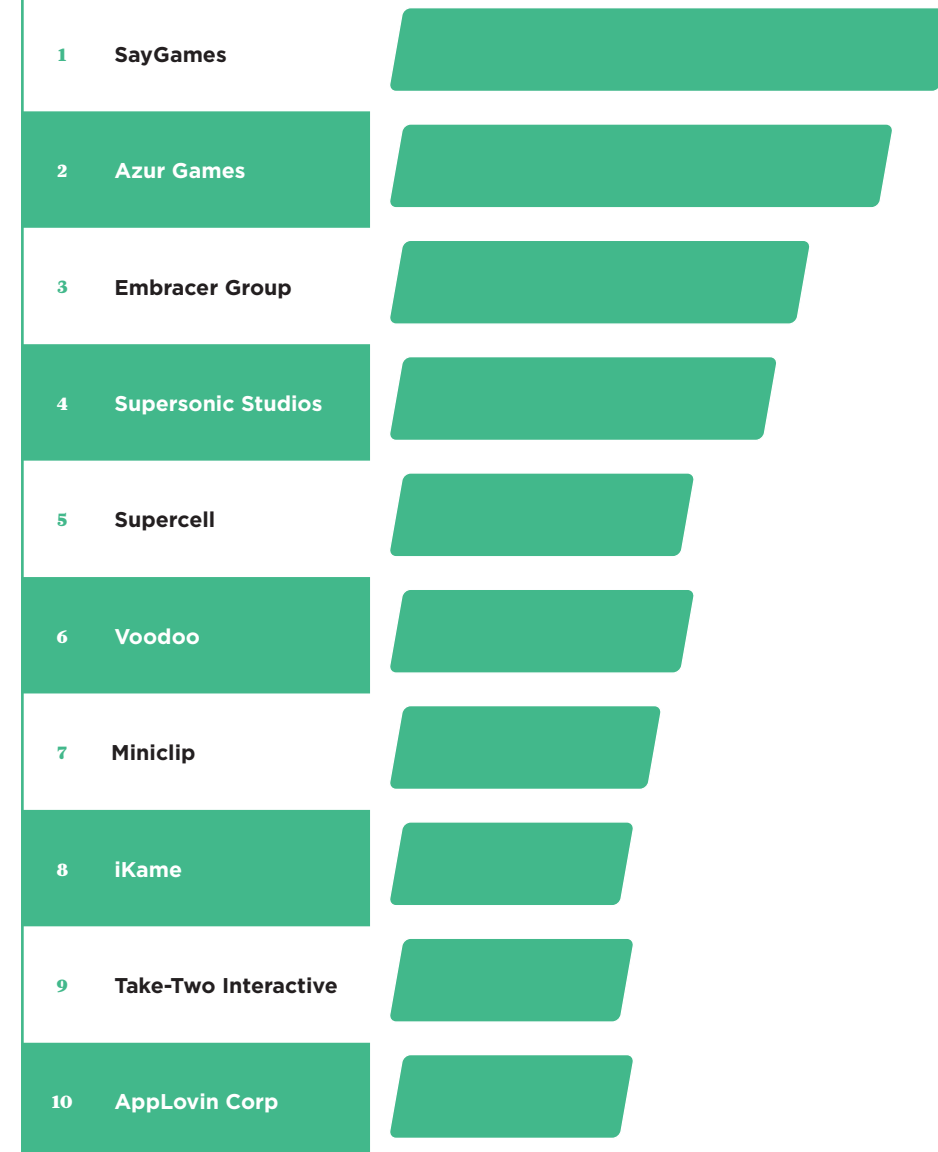
TOP 10 MOBILE SOFTWARE PUBLISHERS

In value (consumer spending)



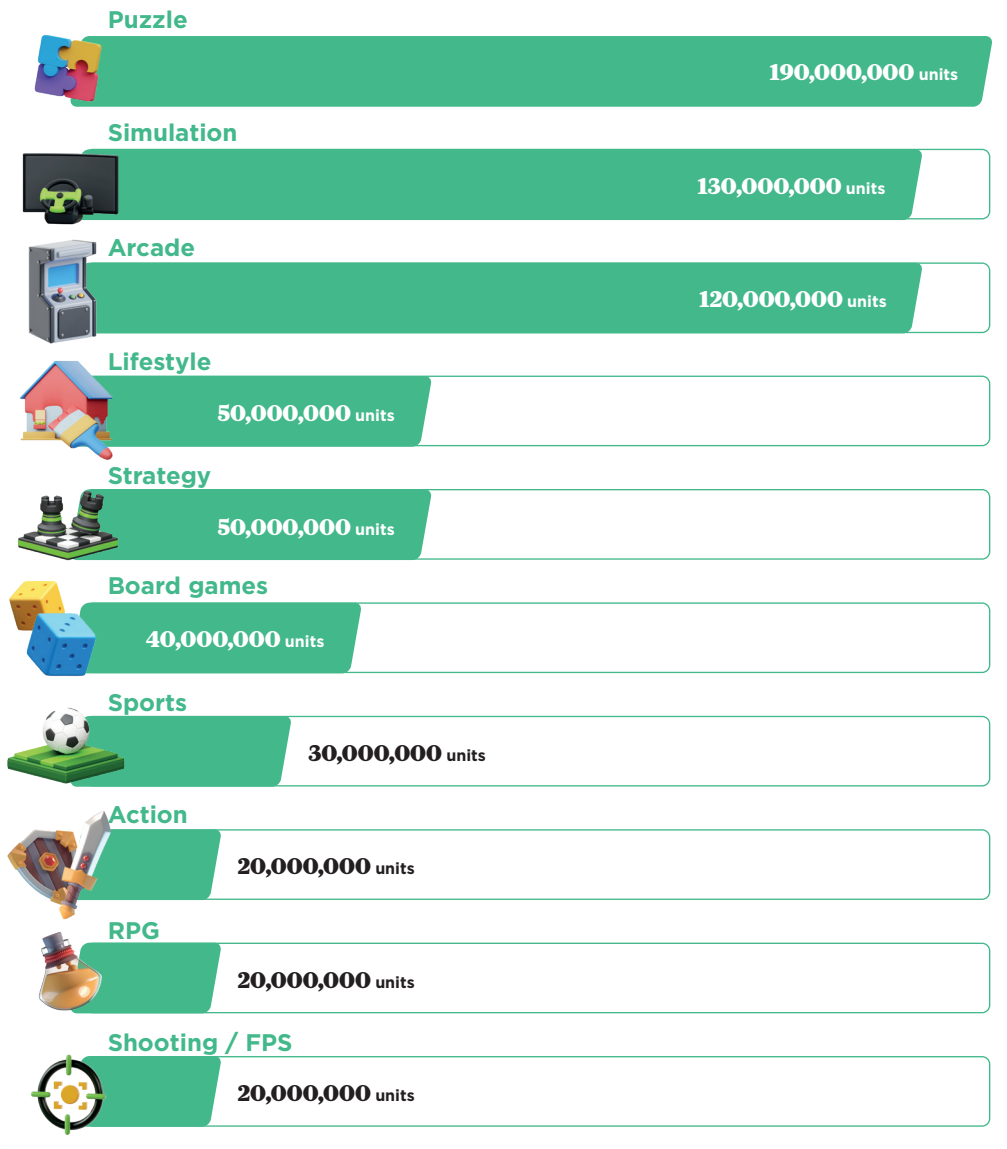
TOP 10 MOBILE SOFTWARE PUBLISHERS

In volume (number of downloads)



TOP 10 MOBILE GAME GENRES

In volume (number of downloads)



CHAPTER

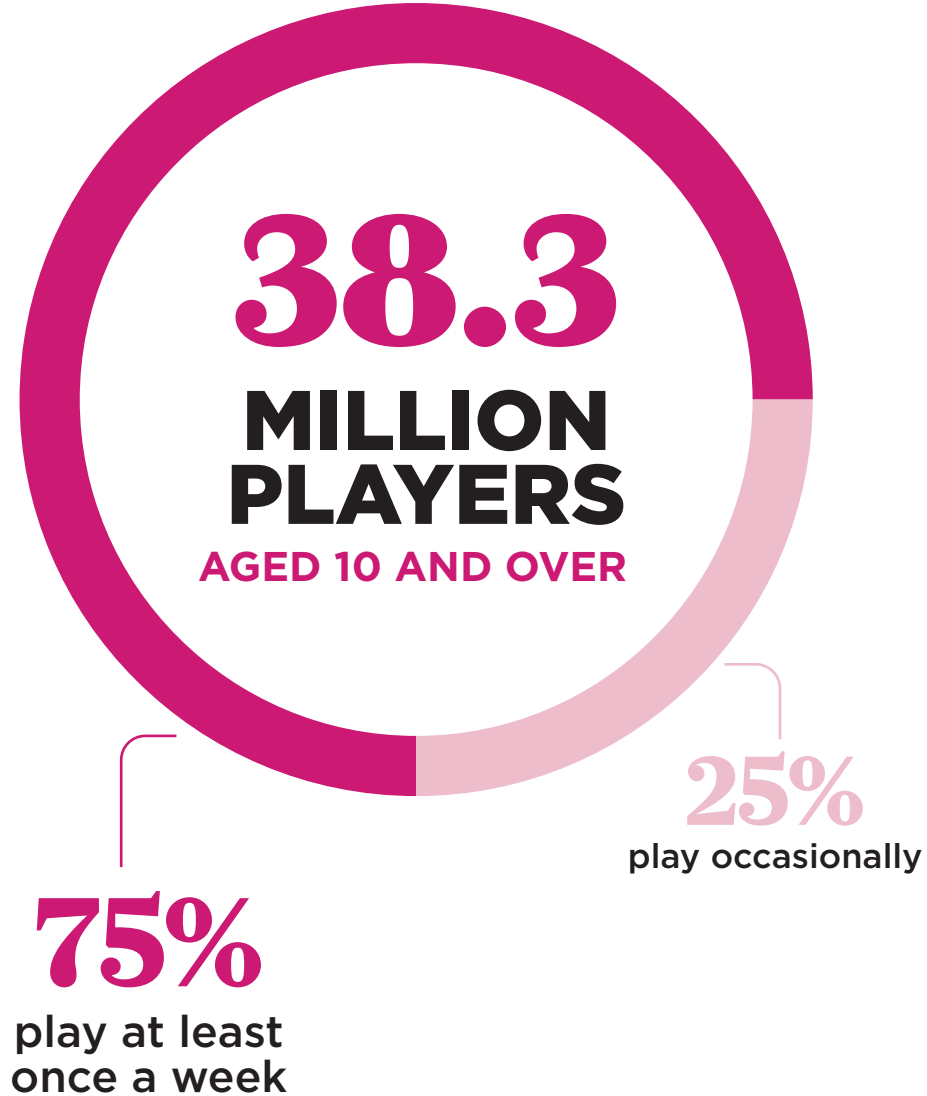
02

THE PROFILE OF FRENCH PLAYERS



Video games in France	52
Different player profiles	54
Devices used to play video games	56
Social aspect of video games	57

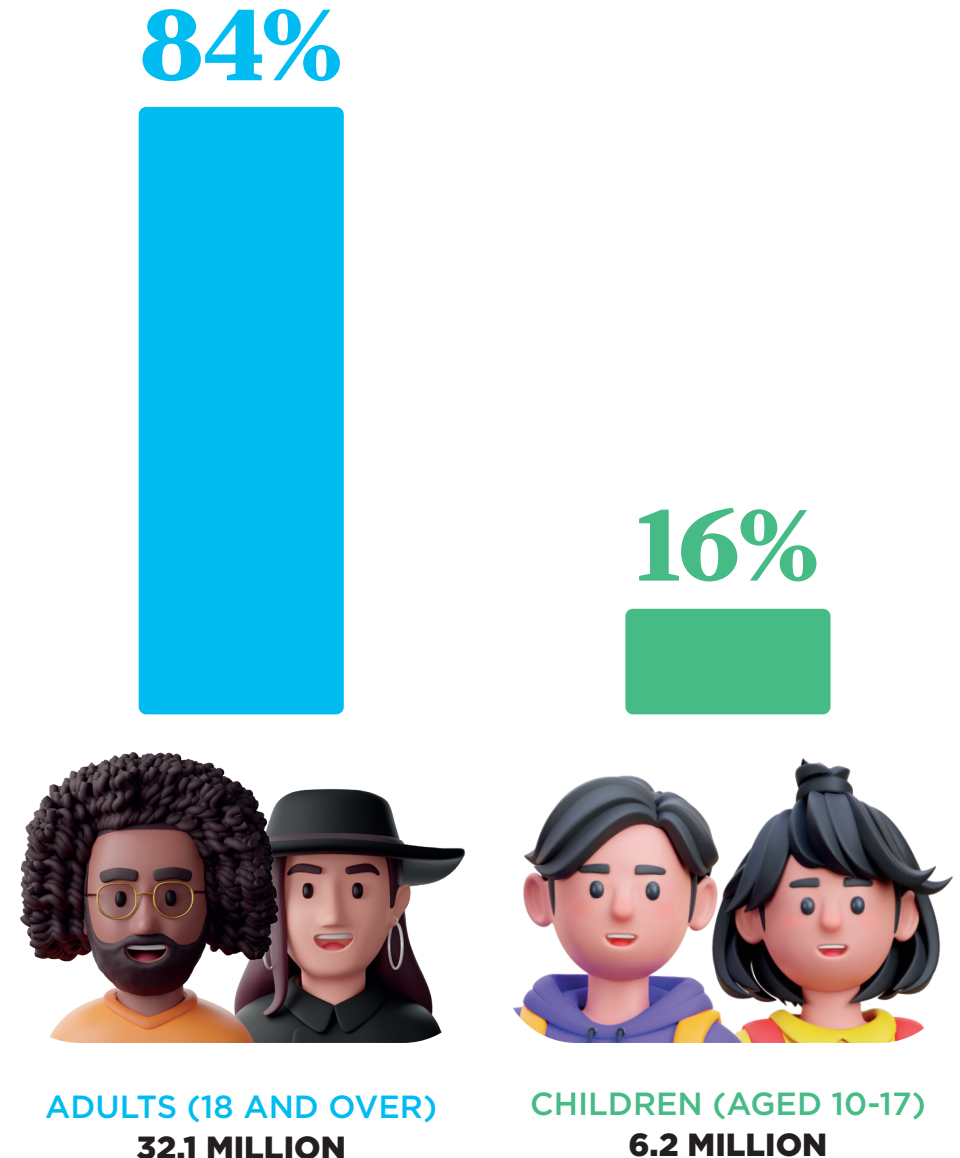
IN FRANCE THERE ARE



*Players who say they play video games at least once a year.

AND 84% OF THEM ARE ADULTS

French video game players



Source: online study from 27th June to 24th July 2024, with a sample of 4,005 people aged 10 to 80, representative of the French population aged between 10 and 80.

1 out of 2 players plays at least once a day

VIDEO GAME PLAYERS



CHILDREN PLAYERS

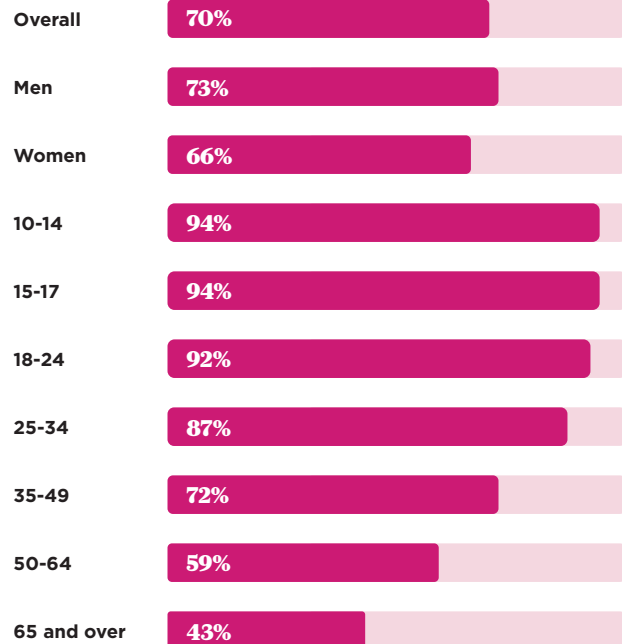


ADULT PLAYERS



■ several times a day ■ every day or nearly every day ■ 1 to 2 times a week ■ 3 times a month or less

Video games involve every segment of the population



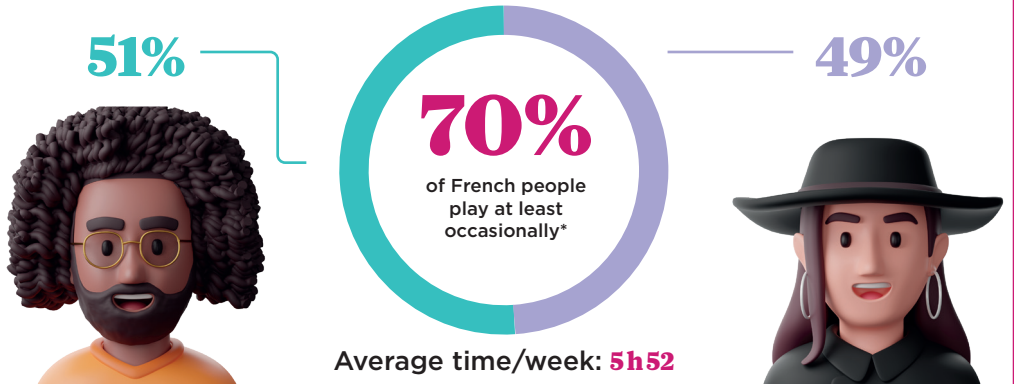
95%
of children play video games (10-17 years)



66%
of adults play video games (18 years or older)

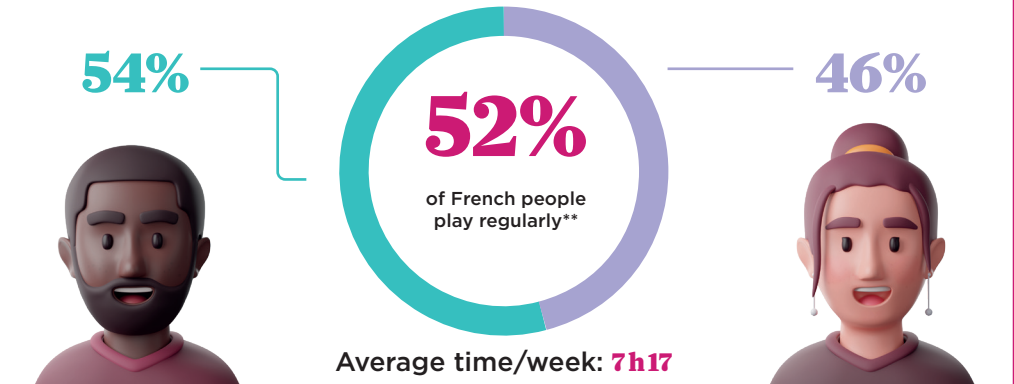
THE PROFILE OF FRENCH PLAYERS

All players



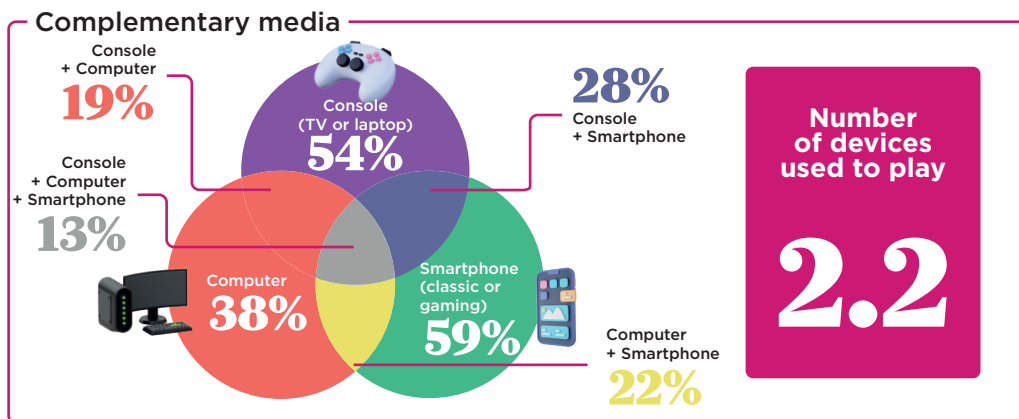
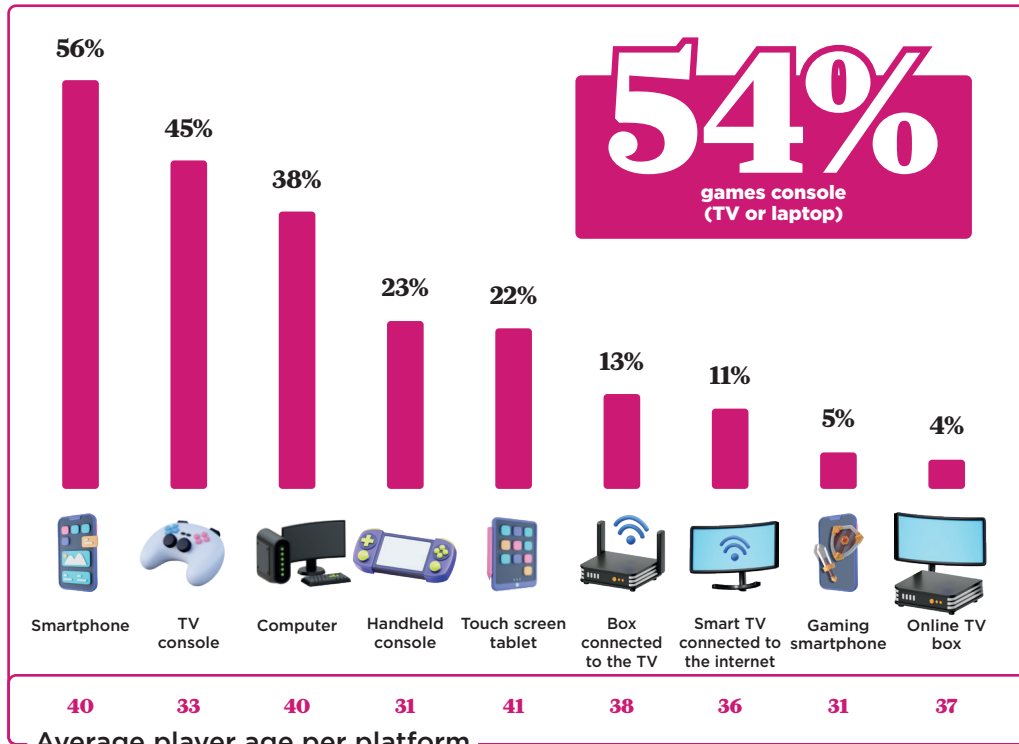
*Players who say they play video games at least once a year.

Regular players



**Players who say they play video games at least once a week.

DEVICES USED TO PLAY VIDEO GAMES

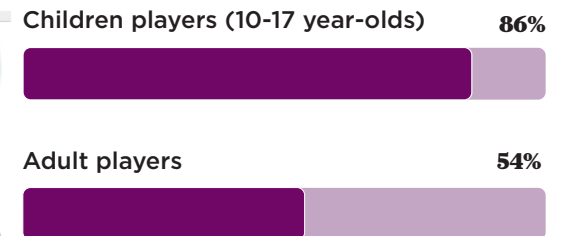


SOCIAL ASPECT OF VIDEO GAMES

Playing games with others



All players **(98%)** play solo, but **59%** also play with others (online or locally).



1 OUT OF 2 PLAYERS



plays online with others **(49%)**



aged between 10 and 17 makes friends through video games **(48%)**



CHAPTER

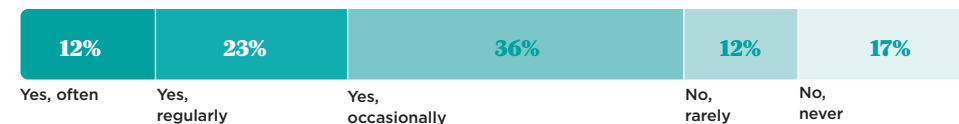
03

A RESPONSIBLE INDUSTRY

- Parent behaviour towards video games 59
- Breakdown of video games on offer 62
- Breakdown of video game sales 63
- The act of buying and the PEGI classification system 64
- PEGI 65
- Parental control systems 68
- Initiatives & campaigns 69

PARENT BEHAVIOUR TOWARDS VIDEO GAMES

1/3 of parents game regularly with their children

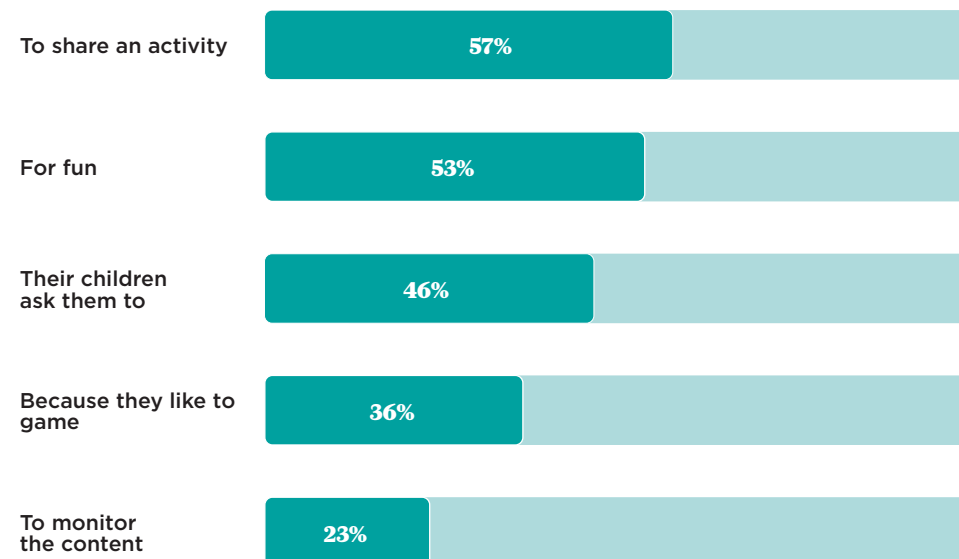


71%

of parents SAY THEY PLAY WITH THEIR CHILDREN at least occasionally

↗ +2 pts VS 2023

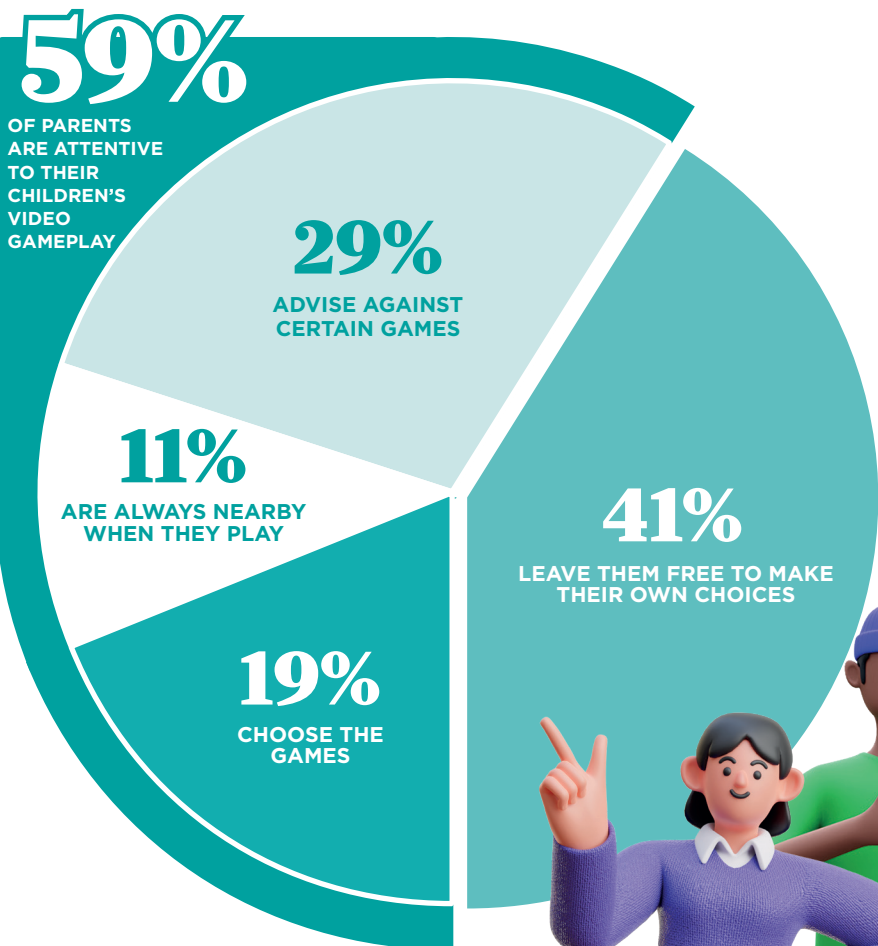
Why do parents play with their children?



Source: online study from 27th June to 24th July 2024, with a sample of 4,005 people aged 10 to 80, representative of the French population aged between 10 and 80.

PARENT BEHAVIOUR TOWARDS VIDEO GAMES

Parents concerned about their children's video gameplay



Knowledge and use of parental control systems

93% SAY THEY ARE AWARE OF PARENTAL CONTROL

41% know about parental control and use it

7% do not know about parental control

52% know about parental control but do not use it

Knowledge of the PEGI system



Video game buyers

69%



Parent video game buyers

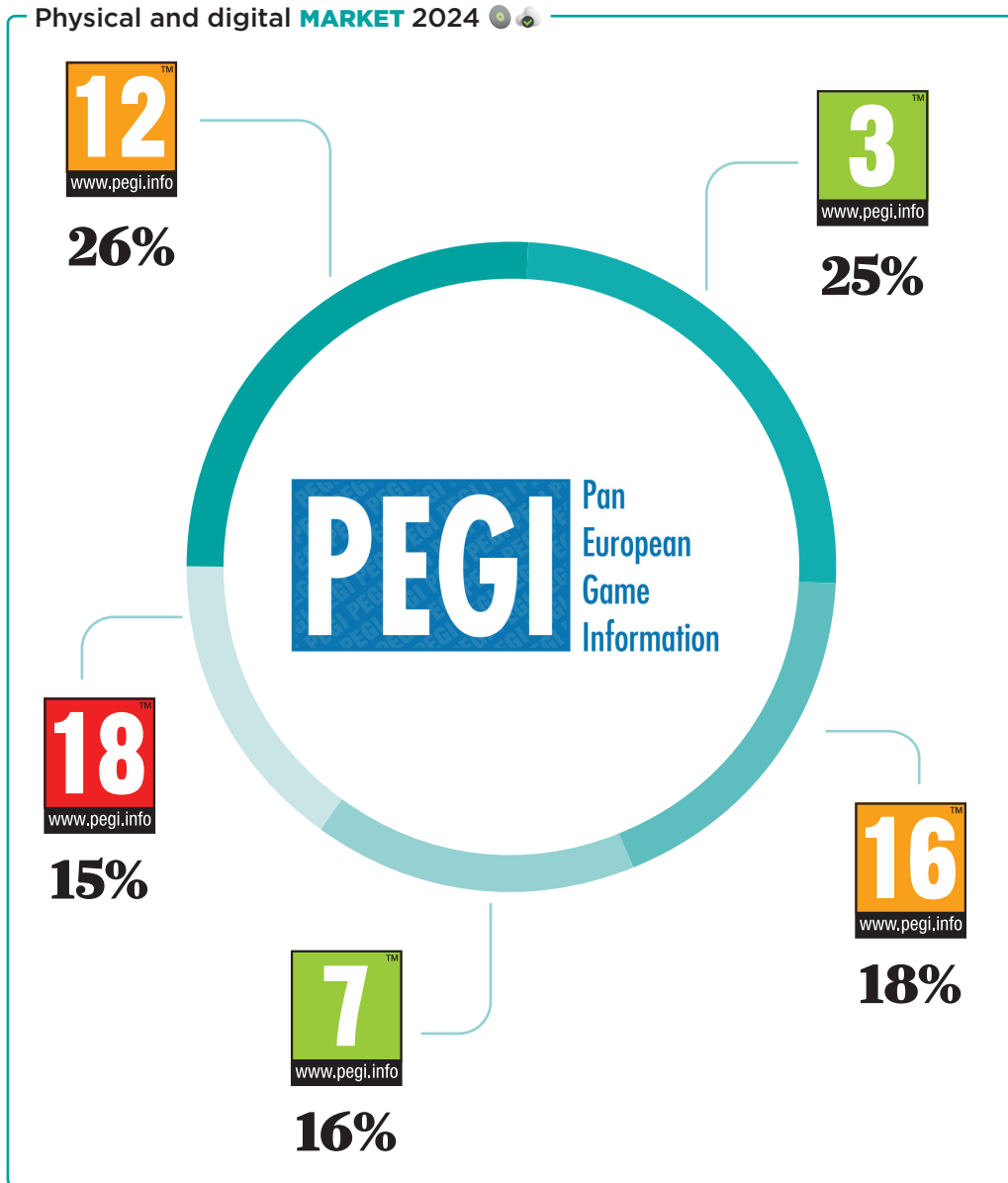
68%



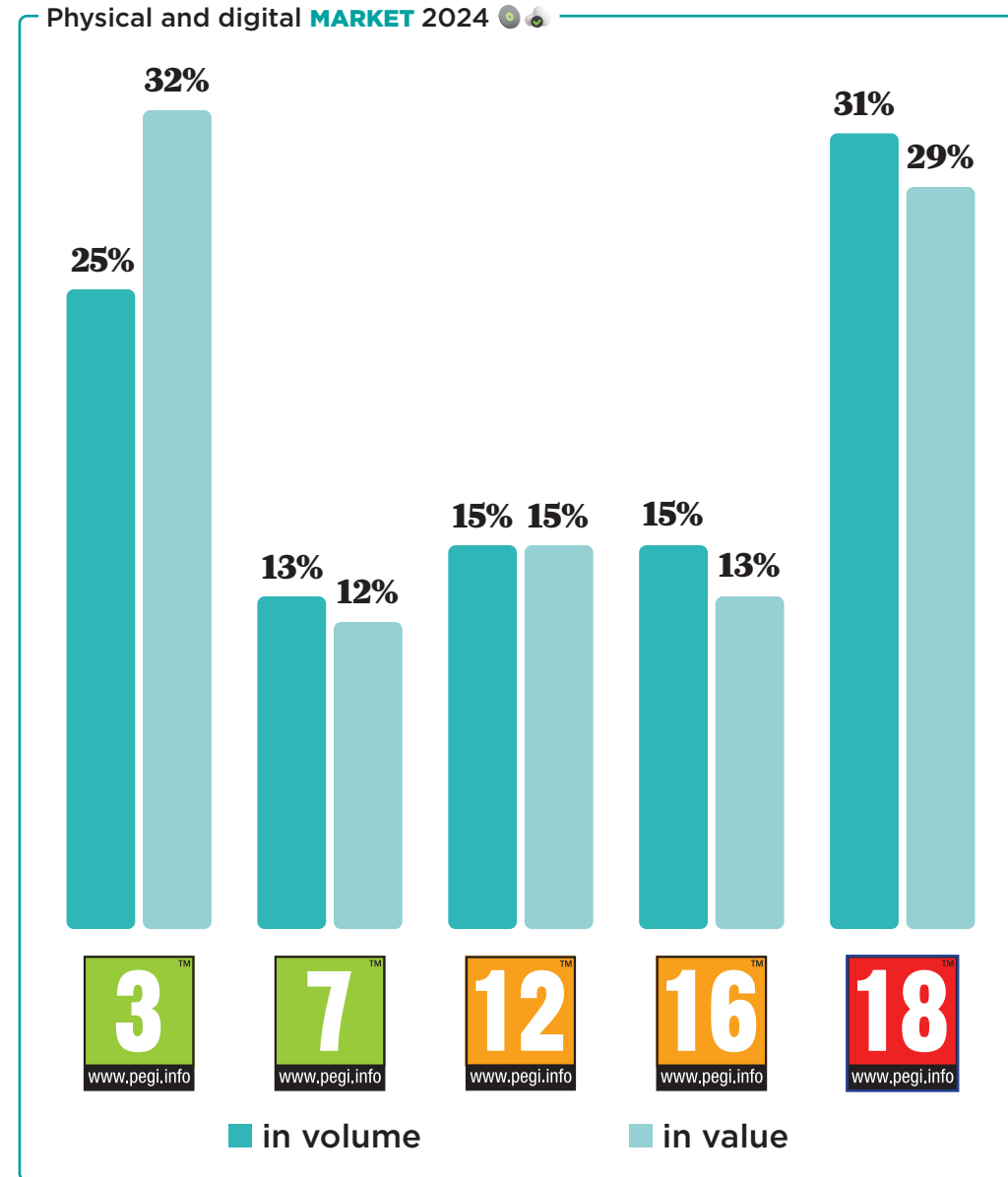
Child video game buyers

66%

BREAKDOWN OF THE VIDEO GAMES MARKET



BREAKDOWN OF VIDEO GAME SALES



THE ACT OF BUYING AND THE PEGI RATING SYSTEM

Attitude to the PEGI rating system



PARENTS VIDEO GAME BUYERS

62%
pay
attention



38%
do not pay attention

CHILDREN VIDEO GAME BUYERS

58%
pay
attention



42%
do not pay attention

PEGI

PAN EUROPEAN GAME INFORMATION

The PEGI age rating system (Pan European Game Information) gives parents throughout Europe the opportunity to make informed decisions before purchasing a video game. <https://pegi.info/20/>

Launched in spring 2003, PEGI has replaced a certain number of national age ratings through unique labels that are now used in most European countries. The system enjoys the support of the leading console manufacturers, including Sony, Microsoft and Nintendo, and also video game publishers and developers throughout Europe. It is also used for all new apps available from the Google Play Store. The age rating system was created by the European Federation for video games (VGE - Video Games Europe).

WHAT DO THE LABELS MEAN?

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

The age rating does not take into account the difficulty of the game or the skills required to play it. The descriptors (see next page) on the back cover or on the page of the game/platform indicate the main reasons why a game has a specific age rating.

**CREATED IN
2003**

**PRESENT
IN 40 COUNTRIES**

**NEARLY 40,000
RATED GAMES AND
MILLIONS OF APPS**


**FEDERATING OVER
2,700 MEMBER
COMPANIES**

AGE LABELS




www.pegi.info

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



www.pegi.info

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



www.pegi.info

Violence towards fantasy characters or unrealistic violence towards human characters.
Mild bad language, nudity, horror.



www.pegi.info


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



www.pegi.info

Extreme violence to defenceless or innocent human characters. Glamorisation of drugs. Sexual expression or activity.


CONTENT DESCRIPTORS



TM

Bad Language

This game contains bad language.



TM

GAMBLING

This game encourages and/or teaches gambling.



TM

DRUGS


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



TM

SEX


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



TM

IN-GAME PURCHASES

The game allows the player to buy digital goods with real money. Might include random items. Includes random content.



TM

VIOLENCE


This game contains violent scenes.



TM

FEAR

This game may frighten young children.



TM

DISCRIMINATION

This game contains images which may encourage discrimination.

PEGI HOW DOES IT WORK?

Every commercialised version of a video game must be approved by PEGI before release. This approval is granted following an assessment by two independent institutes: Nicam (responsible for PEGI 3 and 7 games) and GRA (responsible for PEGI 12, 16 and 18 games) to smooth the process.

NICAM

The **Nicam** (Netherland Institute for the Classification of Audiovisual Media) was founded in 1999, with the support of the Dutch government, in response to the European Commission's order to protect young audiences from unsuitable audiovisual content. Given its extensive expertise in approving audiovisual content, PEGI works with Nicam to approve video games for young audiences (PEGI 3 PEGI 7) published in Europe.



The **GRA** (Games Rating Authority) is an organisation that was founded in 1989 to hold producers of video content - both interactive and non-interactive - accountable for their role in disseminating inappropriate images to the public. Since its inception, the GRA has been responsible for approving games published in the UK. This led PEGI to entrust the British organisation with the task of approving PEGI 12, PEGI 16 and PEGI 18 games in 2003.

THE RATING PROCESS

1 ANALYSING THE CONTENT

Publishers complete a closed-ended questionnaire to determine a provisional rating.

2 PLAYING FOR VALIDATION PURPOSES

The approving officers explore all features of the game to confirm that the answers provided apply to the version under examination.

3 ISSUING THE RATING

The provisional rating is approved or modified within 4 to 10 days. PEGI then issues a licence to the publisher, authorising the use of age labels and descriptors.

4 INFORMING CONSUMERS

The publisher must display the relevant logos on the game box, as well as on its website and in its promotional communications and materials.

PARENTAL CONTROL SYSTEMS

To help families establish rules for playing video games, all consoles have a parental control system. They are easy to activate and configure, so children can enjoy their video games in a digital environment perfectly suited to their age. But why use a parental control system?

THERE IS AN AGE FOR EVERYTHING AND THERE IS A VIDEO GAME FOR EVERY AGE.

Every age takes pleasure in different things. Not all video games are intended for children. That's why the PEGI rating system makes things much easier, providing clear information on this particular issue. Parental control systems take this into account, preventing children from playing games inappropriate for their age.

ESTABLISHING A CHILD'S PLAYTIME

Most solutions allow parents to define digital activity times. This usually concerns playing video games. It is therefore possible to set out a schedule for each day, indicating periods when a child is allowed to play video games. Outside these periods, they will be unable to play video games. This feature can be particularly useful when older children are at home alone, preventing them from playing video games beyond their allocated time slots. Some solutions even offer remote monitoring via an app!

REGULATING INTERNET BROWSING

Parental control systems allow you to authorise or unauthorise internet browsing while restricting access to certain sites. For example, before you give your child your tablet or computer, make sure that they are unable to access offensive content, pornographic sites or online gambling. Parental control systems allow you to identify the exact sites to which your children have access, ensuring a pleasant browsing experience. Sometimes, it is even possible to identify keywords that should be blocked automatically.

PROTECTING YOUR PRIVACY

Parental control systems can also prevent your children from sharing personal information with strangers. For example, some disable the option to enter personal details in a questionnaire. They can also block chats or prevent access to forums.

RESTRICTING ACCESS

Whether it's a smartphone, tablet or laptop, not all content on your device is intended for your children. When you lend them your device, you may want to make sure that they are unable to look through your personal files. It would be a real shame if they accidentally deleted all your family photos that you had carefully arranged into folders. Parental control systems can restrict access to certain areas, applications and folders.



Learn more about the Nintendo Switch's parental control system on the Nintendo website nintendo.co.uk/Hardware/Parental-control-of-Nintendo-Switch/Parental-control-of-Nintendo-Switch-1183145.html



Learn more about the Xbox Series X|S and Xbox One parental control system on the Xbox website xbox.com/en-EN/community/for-everyone/responsible-gaming



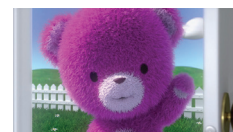
Learn more about the PS4 and PS5 parental control system on the PlayStation website playstation.com/en-en/support/account/ps5-parental-controls-spending-limits/



To find out more and install your parental control systems step by step, please visit the PédaGoJeux website pedagojeux.fr/accompagner-mon-enfant/

INITIATIVES & CAMPAIGNS

The SELL's main aim is to provide information and raise awareness among families and players. As a founding member of the PédaGoJeux collective and a steering committee member of the PEGI age rating system, the SELL runs large-scale campaigns every year to raise awareness about these best practices among families and to encourage parents to adopt them.



2016 "There's an age for everything. There is a video game for every age." Cinema and web campaign



2017 Three rules for better video game fun Published an advertorial in 11 general public magazines.



2018 PEGI Documentary Produced a documentary: PEGI teams explained how the organisation operates, as well as each stage of the rating process.



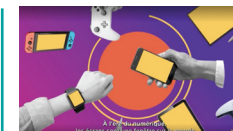
2018 The PEGI Guide Produced an information guide on the PEGI system.



2019 "Good play, good memories" TV and web ad about PEGI, PédaGoJeux and parental control systems.



2020-2021 #ITSYOURTURNTOPLAY! Digital awareness campaigns to encourage parents to install and configure parental control systems.



2022 "A new look at screens" A digital campaign that explains screen use and raises awareness about the need to install parental control systems.



2023 Partner of Safer Internet Day Safer Internet prevention campaign.

CHAPTER 04

THE UNION OF VIDEO GAME PUBLISHERS



SYNDICAT
DES ÉDITEURS
DE LOGICIELS
DE LOISIRS



Our missions	72
Members	74
The board of directors	75
30 years of SELL	76

About us

The Union of Video Game Publishers (Syndicat des Éditeurs de Logiciels - SELL) is a professional organisation founded 30 years ago in 1995, bringing together companies specialising in video game publishing.

With its 24 members, including 2 associate members, SELL represents the interests of the video game sector in contact with organisations, the media, families and players. Publishers play a key role in promoting video games: they identify promising studios, support them and take charge of the distribution, marketing and communication around their creations.

SELL's vocation is to federate these partners and promote joint actions that demonstrate the diversity, creativity and responsible engagement of this industry. Its main missions are to promote video games and raise awareness of players and families about best practices, so they can enjoy playing with peace of mind.

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, all of the video game sector. It is the key contact with public authorities, politicians and also innovative and cultural ecosystems.

To achieve this, SELL has joined several organisations and working groups.

INTERMINISTERIAL WORKING GROUP made up of the DGE, the CNC, the National Video Game Union (SNJV), SELL and Ubisoft.

CNC: member of the Commission for Diversity in the Cultural Sector.

ARCOM: member of the Child Protection Commission.

STRATEGIC GUIDANCE of the National Digital Council.

VGE (VIDEO GAMES EUROPE): board member.

FRANCE ESPORTS: board member.



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 and promote inclusion, diversity, digital sobriety and accessibility.

PEGI: created in 2003, PEGI (Pan European Game Information) is the European rating system for video games. It provides information on the content of each game and indicates a minimum advised playing age.

PEGI is present in forty countries, has ratified over thirty-five thousand games and millions of apps and has over two thousand five hundred member companies.

PÉDAGOJEUX: a collective created in 2008 by bringing together people from public bodies, the video games industry and charities. This collective has a mission to raise awareness and help people understand video games.

SUPPORTING ORGANISATIONS PROMOTING 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 games, the industry's innovations and creativity with the general public, national and European stakeholders and also the media. SELL carries out its promotional actions through regular communication and most importantly via two major annual events: the IDEF and Paris Games Week.

IDEF: created in 2006 by SELL, the Interactive & Digital Entertainment Festival is an event for French stakeholders in the video game and interactive leisure activity market. It takes place every year in

the early summer. Developers, publishers, accessory manufacturers and distributors come together for business meetings to structure the end of the year.

PARIS GAMES WEEK: in 2024, PGW welcomed 188,000 visitors and 156 exhibitors spread over three halls, bringing together players, families and friends around the same passion for video games. This edition testifies to the continuing popularity of video games and confirms its position as a must-attend event for the video game community.



Structuring market information

SELL works with partners to provide the whole ecosystem with reliable studies on the video game market, video game player profiles and also video game player purchasing and use. Several panels are used to carry out this analysis.

GSD PANEL, GAME SALES DATA (DISTRIBUTORS AND DIGITAL): VGE/Sparkers

GAMETRACK PANEL (CONSUMERS): VGE/IPROS

SENSOR TOWER PANEL (MOBILE IDC PANEL (PC GAMING HARDWARE AND SCREENS): SELL

OTHER SURVEYS: French people and video games, SELL/Médiamétrie

MEMBERS

BANDAI NAMCO

CAPCOM®

DON'T NOD



innelec

KONAMI

MAXIMUM
ENTERTAINMENT

MICROIDS

Microsoft

nAcon

Nintendo

PLAION

Plug in
DIGITALPULLUP
ENTERTAINMENTQUANTIC
DREAMRIOT
GAMES

ROBLOX

SEGA®

Sony
Interactive
Entertainment

SQUARE ENIX.

T2
TAKE-TWO INTERACTIVE

Tencent

UBISOFT

WARNER BROS.
GAMESBOARD
OF DIRECTORS**CHRISTOPHE HAVART**

Bandai Namco Entertainment

SOPHIE CARABALONA

Electronic Arts

YVES BLEHAUT

Microids

CÉDRIC MIMOUNI

Microsoft

PHILIPPE LAVOUÉ

Nintendo

JAMES REBOURS

Plaion

GEOFFROY SARDIN

PULLUP Entertainment

GUILLAUME DE FONDAUMIÈRE

Quantic Dream

NATHALIE DACQUIN

Sony Interactive Entertainment

FLORENT MOREAU

Square Enix

PATRICK BELLAICHE AND MICHEL MAGNE

Take-Two Interactive

BÉNÉDICTE GERMAIN

Ubisoft

YVES ELALOUF

Warner Bros. Games

THREE DECADES AT THE SERVICE OF VIDEO GAMES

1995

Creation of SELL

1999

Creation of ISFE

2003

Creation of PEGI

2006

1st edition of IDEF

2008

Creation of Pédagojeux
Creation of the Video Games Tax Credit

2010

Creation of Paris Games Week

2013

Creation of Essential Video Game News

2016

10th edition of IDEF
SELL contributes to the 1st Esport law

2020

Video games are recognised as “essential goods”

2016-2022

Major prevention campaigns

2022

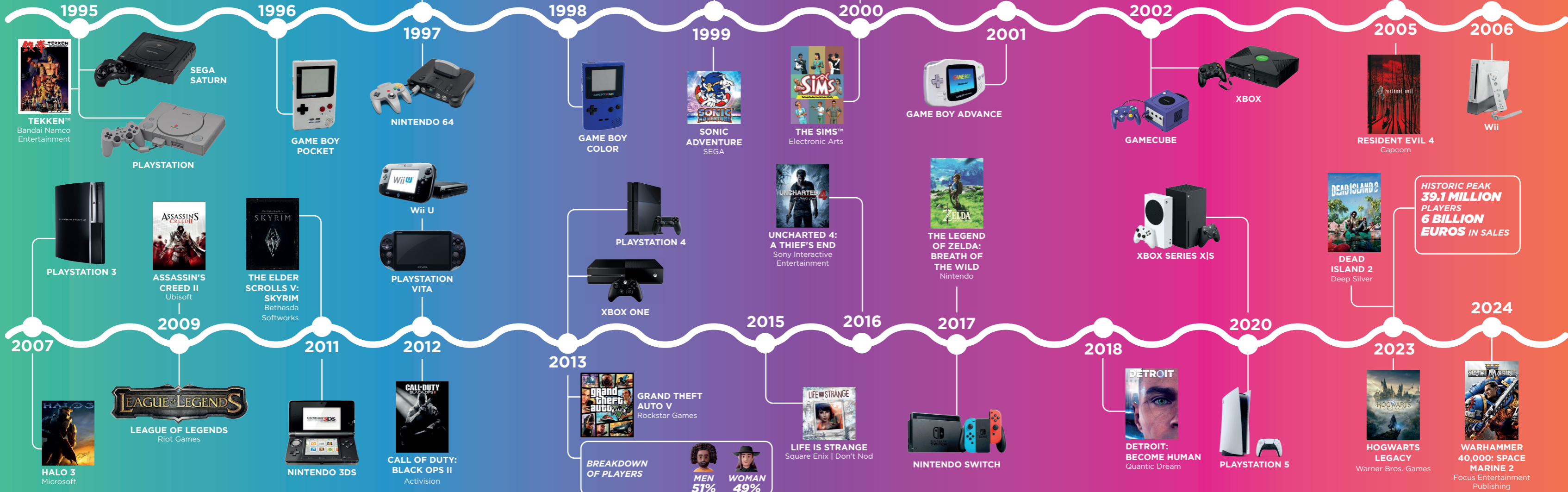
ISFE becomes Video Games Europe

2025

Extension of the Video Games Tax Credit until 2031



30 YEARS OF INNOVATIONS AND CHANGES IN VIDEO GAMES





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