CONTENTS

METHODOLOGICAL REMINDER

The SNJV provides a representative picture of the sector. The survey of 577 verified and qualified video game development companies took place between February, 28th 2023 and June, 26th 2023.

The questionnaire was distributed by SNJV with the support of regional video game associations.
The questionnaire was self-administred online.The rate of participation reached 23%

In this report, whenever "companies" are mentioned, reference is made to video game development companies.

KEY TAKEAWAYS FOR THE YEAR 2022

VIDEO GAMES PRODUCTION

Nearly 1260 video games in production
Over 850 new IPs created

EMPLOYMENT

76% of jobs in permanent contracts

24% of women on staff in development studios

Between 400 and 600 job creations within game development studios in 2023.

FINANCIAL SITUATION

27% of studios generate revenue exceeding 1 million euros.
Over 80% of companies have a majority French ownership.
10% of development studios raised funds in 2022

INTERNATIONAL

85% of development studios consider France to be an attractive territory.

Almost a third of the development studios cite fiscal incentives as a major factor of attractiveness

CSR

10% of surveyed companies have already conducted their company's carbon footprint assessment.

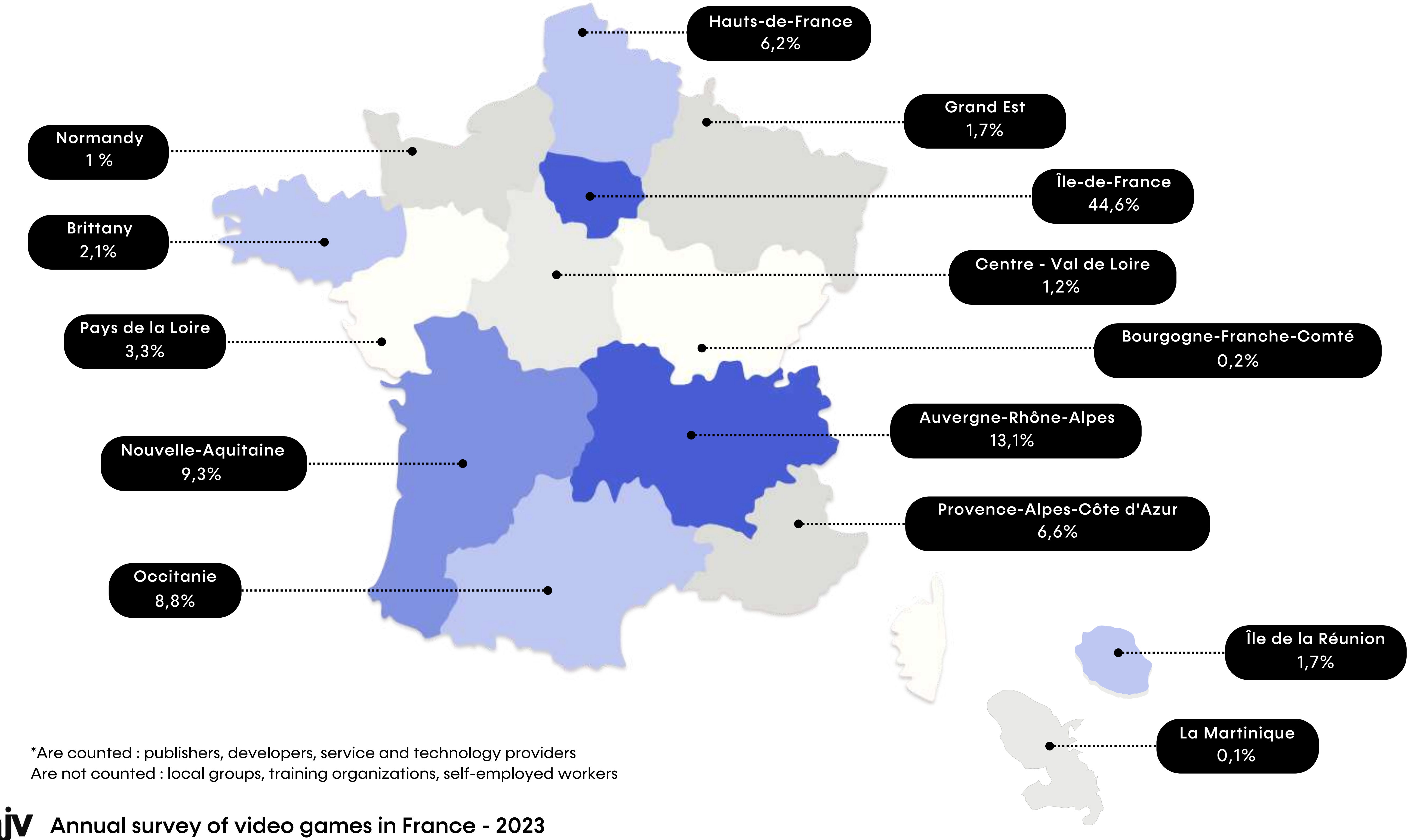
Almost one company out of two plans to conduct its carbon footprint assessment in 2023

TELECOMMUTING AND FLEXIBILITY

One-third of companies have adopted a full-time remote work schedule.

CHAPTER 1 ECONOMIC FABRIC

Percentage of video game companies by region



*Are counted : publishers, developers, service and technology providers
Are not counted : local groups, training organizations, self-employed workers

1000

In 2022, the French video game industry comprises 1000 companies, including 580 game development studios.

CHAPTER 2 VIDEO GAME PRODUCTION

1257 GAMES IN PRODUCTION

-7% compared to 2020

854 new IPs

this represents 68% of the production (1253 titles in 2020)

776 GAMES released

-7% compared to 2020

64 VR/MR/AR GAMES

51 competitive GAMES

9% of the companies (compared to 12% in 2020).

42 GAMES including blockchain technology

7% of the companies (compared to 4% in 2020)

42 GAMES including NFTs

INSIGHT

In 2022, French productions once again made an impact on the international stage. Six productions were nominated at the end of 2022 during the Game Awards ceremony, including two in the 'Game of the Year' category: A Plague Tale: Requiem by Asobo Studio (Bordeaux) and Stray by Blue Twelve Studio (Montpellier)

In France, one out of two companies is located in a region: regional associations play a crucial role in animating these ecosystems.

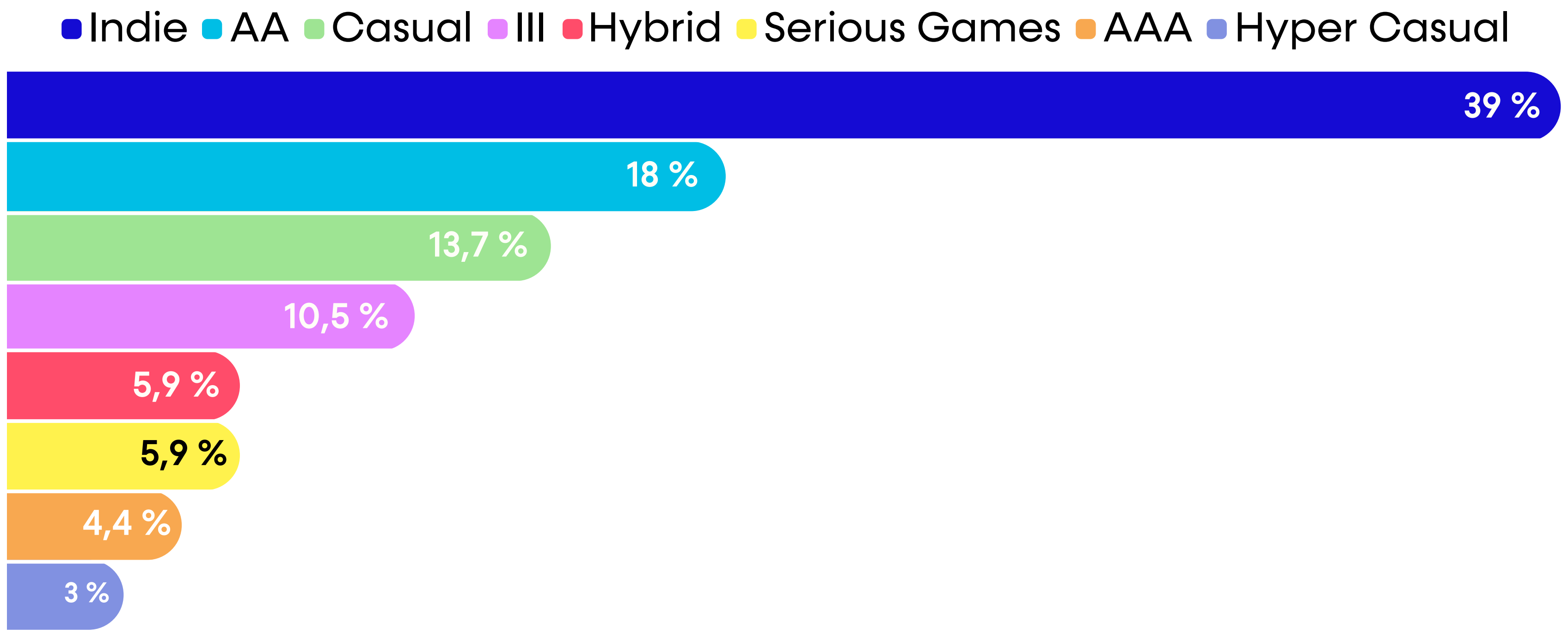
Although the number of games in production decreased by 7% between 2022 and 2021, the number of games released remained stable. In 2022, game development studios appear more confident in their ability to deliver their productions.

In 2022, 7% of companies are developing video games integrating blockchain technology (compared to 4% in 2021). Although the use of this technology remains on the fringes of developments, there is a real trend in exploring new technological opportunities.

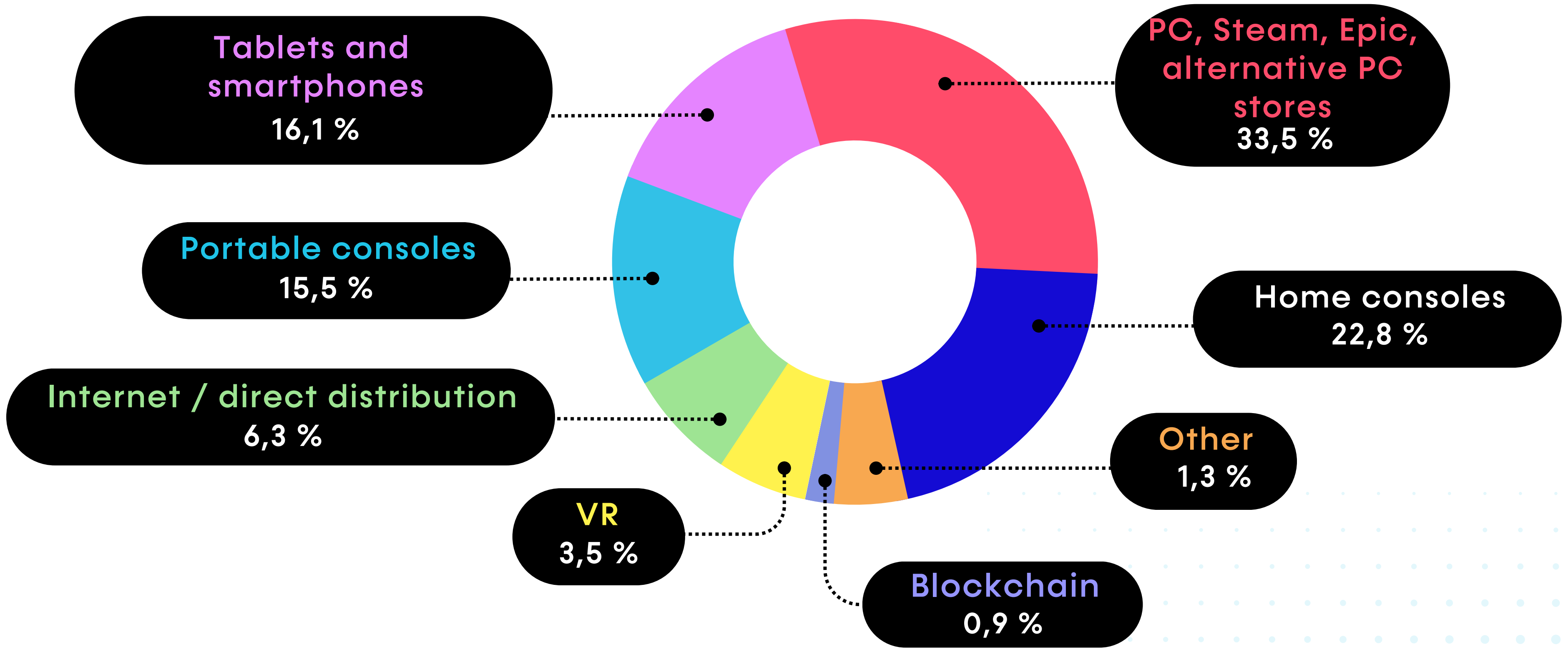
The French production is still characterized by a primarily independent editorial positioning (39% of the production).

Publishers have been gaining more influence year after year: while in 2019, 39% of studios worked with a publisher, the number increased to 53% in 2021, and reached 62% in 2022.

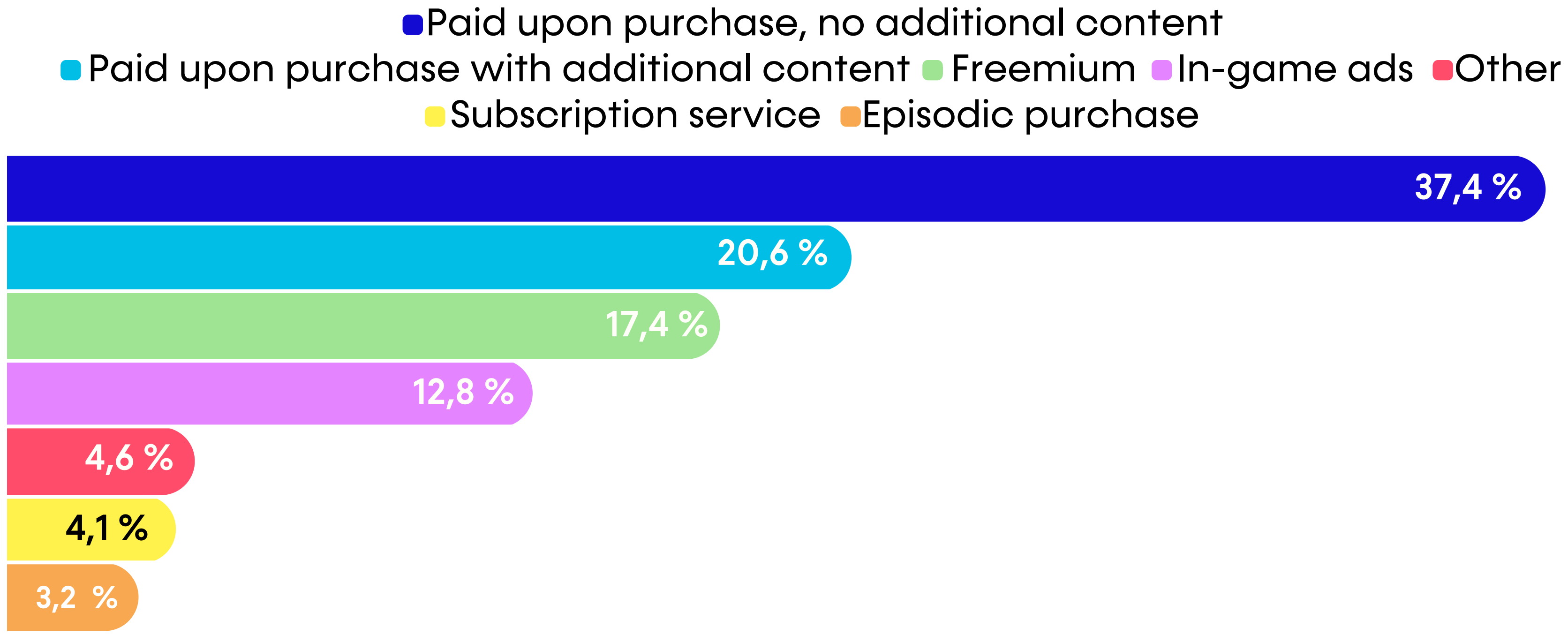
Types of games developed by studios



Game distribution platforms



Business models

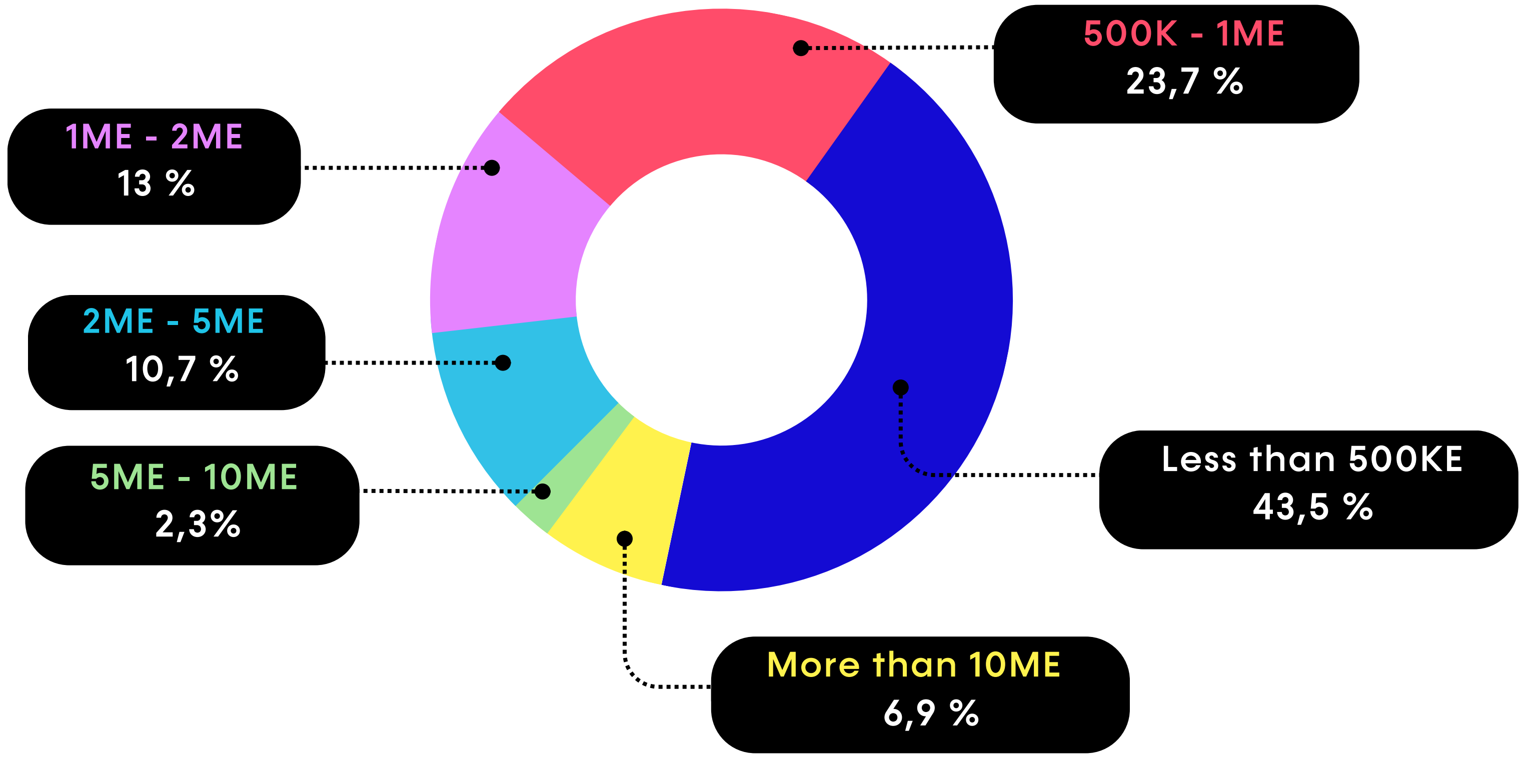


Number of games self-published by development studios

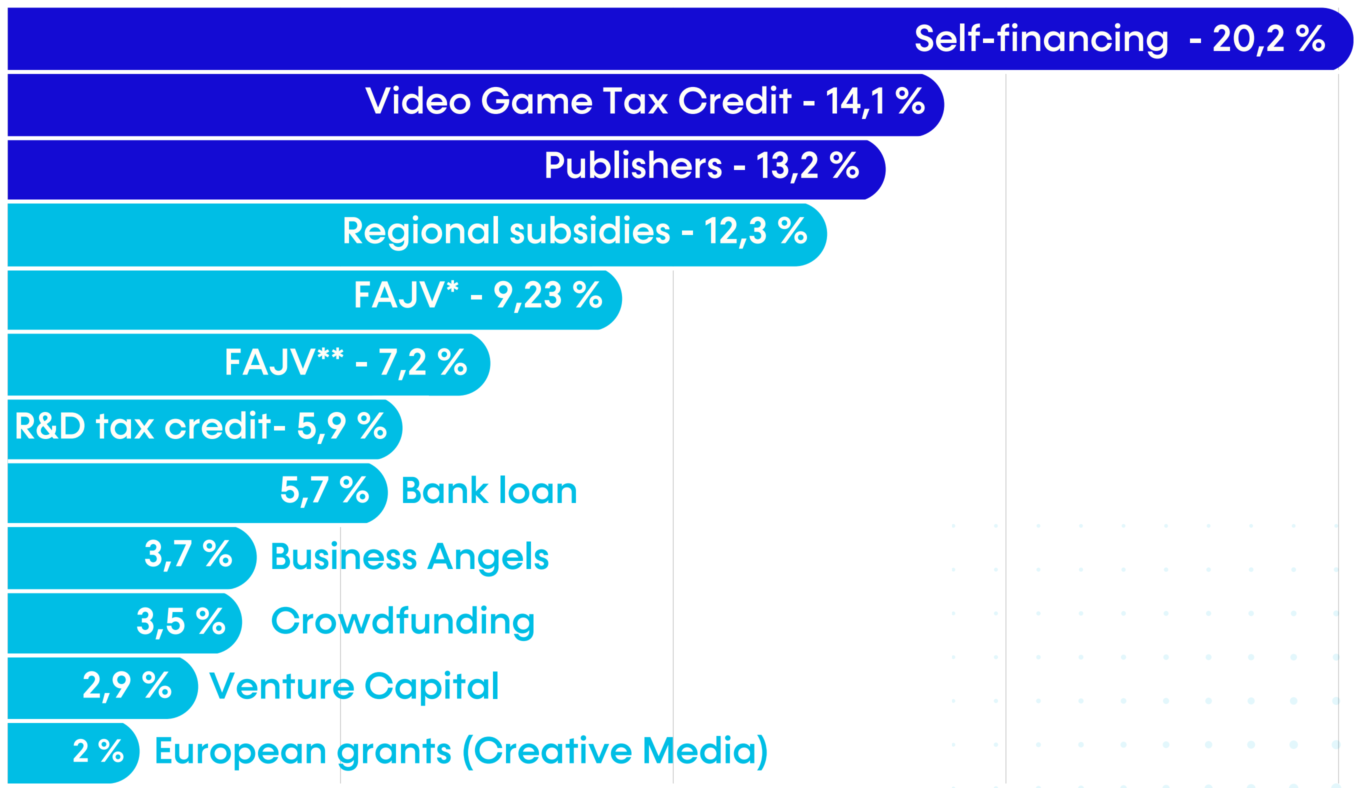
38% **of development studios**

self-publish their games (compared to 47% in 2020)

Average budget per game

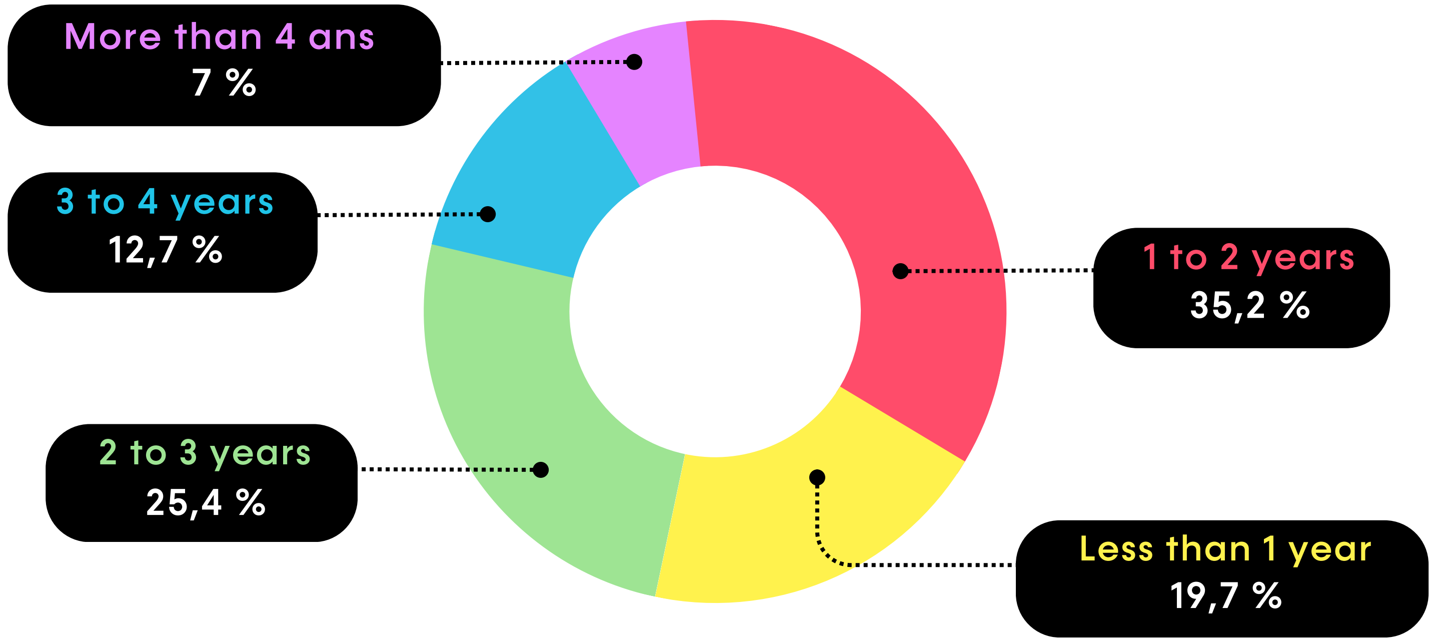


Production financing mechanisms



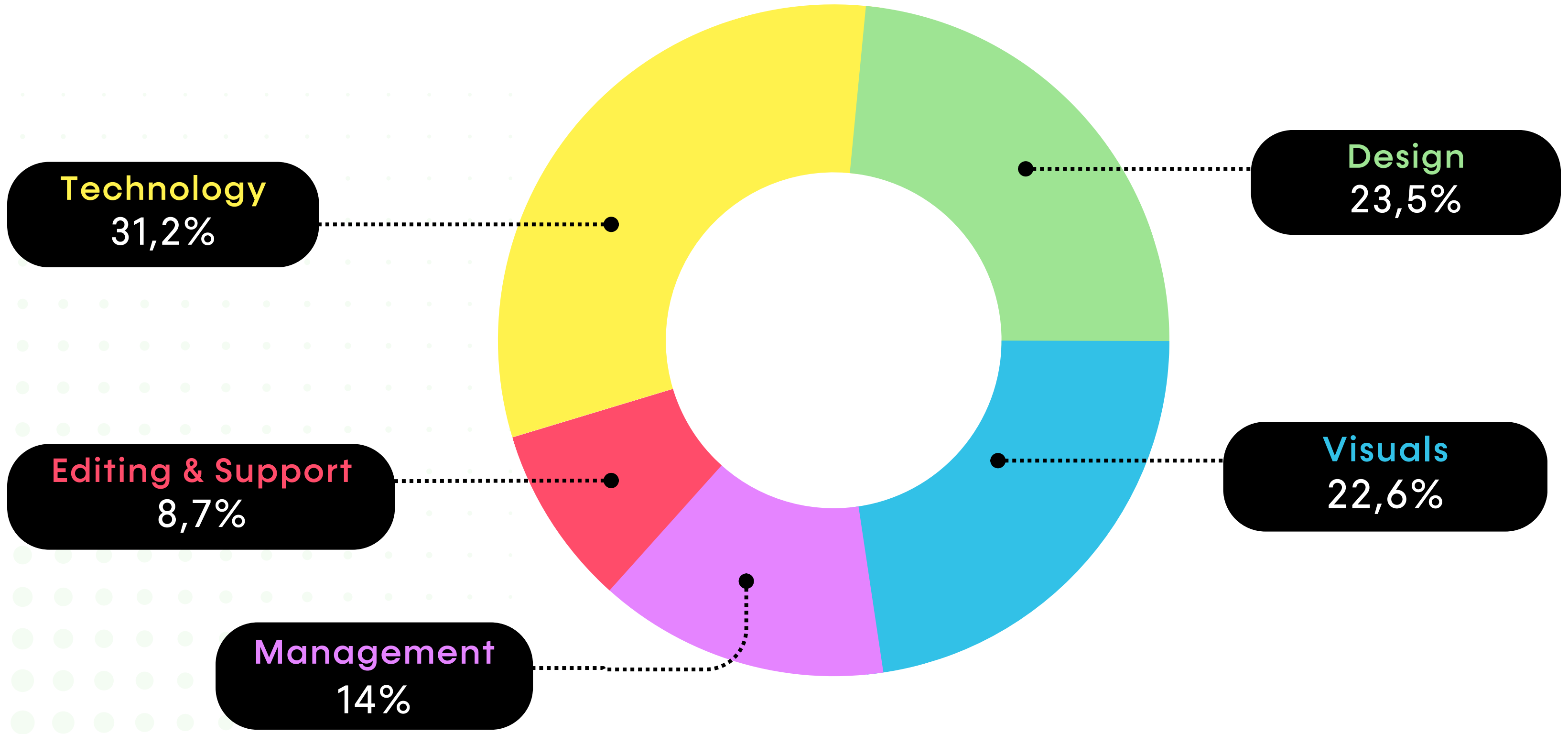
*Aide à la préproduction
** Aide à la production

Average development time per video game



CHAPTER 3 EMPLOYMENT

Breakdown of workforce according to job category



Gender diversity in the industry

24% women in development studios
+2 points compared to 2020
+10 points compared to 2018

Proportion of women in leadership/supervisory positions

20% women in game company management (+9 points compared to 2020)

INSIGHT

In 2022, permanent employment (CDI) remains stable and overwhelmingly dominant, serving as a strong factor in attracting talent to our companies.
The significant increase in apprenticeships marks the first step in enabling a larger number of individuals to access education and training in the field of video game industry.

Workforce distribution by job type

76% of salaried jobs are in permanent contracts (80% in 2020)

Increase in apprenticeships within the studios:
6% of the workforce in 2022
(+ 5 points compared to 2020)

Evolution of workforce in 2023

52% of development studios are hiring in 2023

40% are maintaining their workforce

7,5% are reducing their workforce

Hiring in 2023

34% of development studios will be opening between 1 and 5 positions

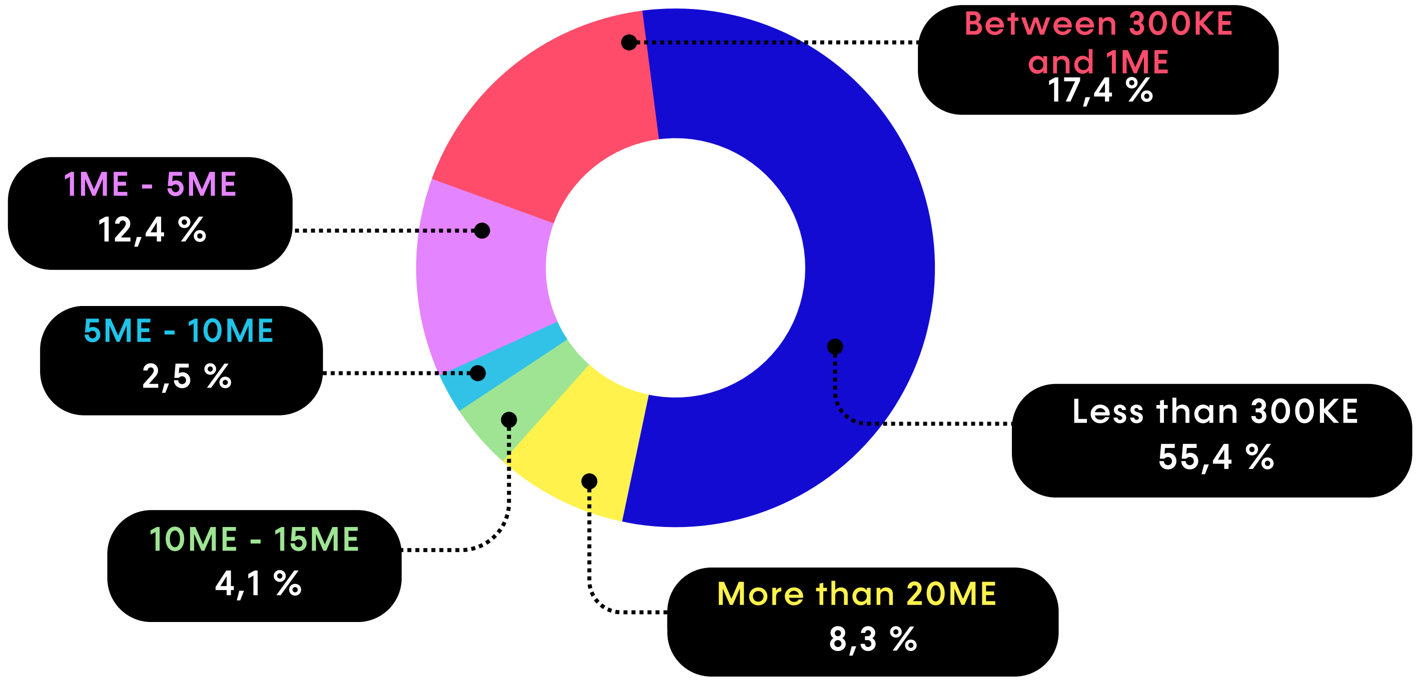
12% of development studios will be opening between 6 and 10 positions

9% of development studios will be opening more than 10 positions

Between 400 and 600 job creations within game development studios in 2023.
This figure is lower compared to 2020, given the tension in signing new contracts between publishers and game development studios.

CHAPTER 4 THE FINANCIAL SITUATIONS OF COMPANIES

Companies revenue



27% of companies have a revenue exceeding 1 million euros (+9 points compared to 2020)

INSIGHT

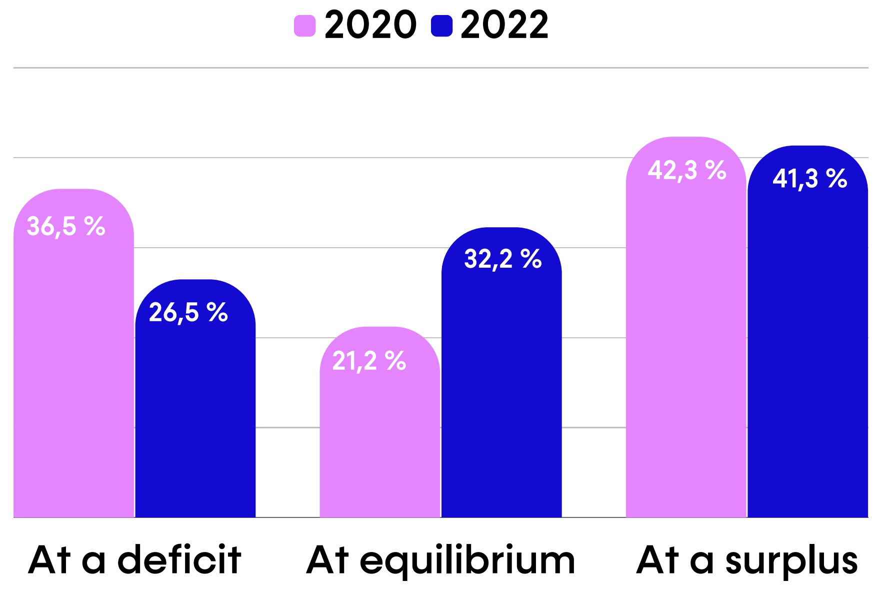
The revenue of video game studios is growing in 2022: 14.4% of studios report a turnover exceeding 10 million euros (6.4% in 2020).

However, the industry is still primarily composed of studios with revenues below 300,000 euros (55%).

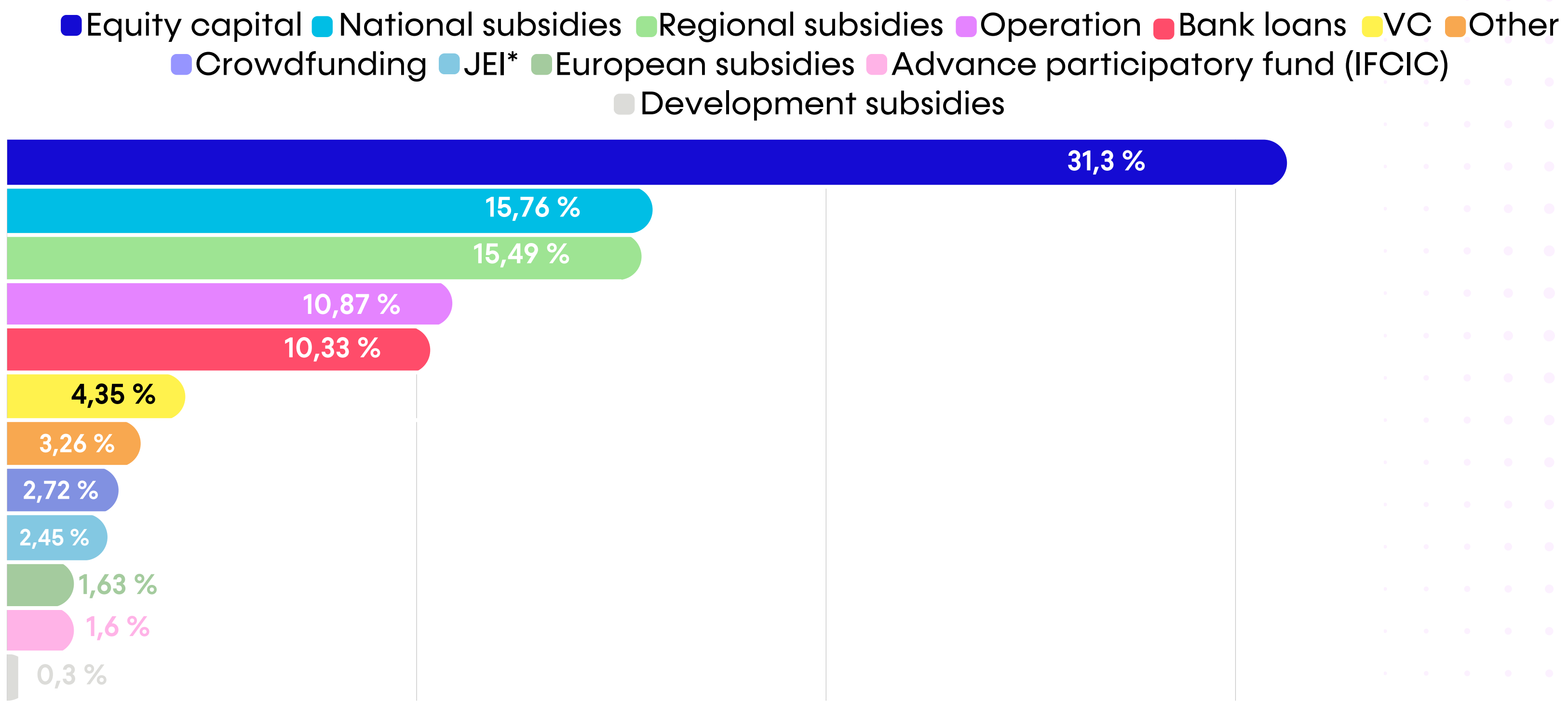
The capital of the companies in 2022

The capital of the surveyed companies is primarily French (83.7% of the companies) and European for 6.5%.

Financial position at the end of the fiscal year



The financing methods of companies



Access to bank credit

30% of companies have an easy access to bank credit (51% en 2020)

9,8% of companies have difficulties accessing a bank credit (12% in 2020)

6,50% of companies were refused a bank credit

53,7% of companies have never used a bank credit

Fundraising rounds in 2022

9,9% of companies iraised funds in 2022

Fundraising rounds in 2023

33% of companies plan to raise funds in 2023

Source of fundraising

Company acquisitions in 2022

10,5% of surveyed companies underwent a partial or total sale of their activities

62% of the acquirers were video game publishers and distributors, and 37% were investment funds

75% of acquisitions were made with a French economic entity

Ongoing acquisitions

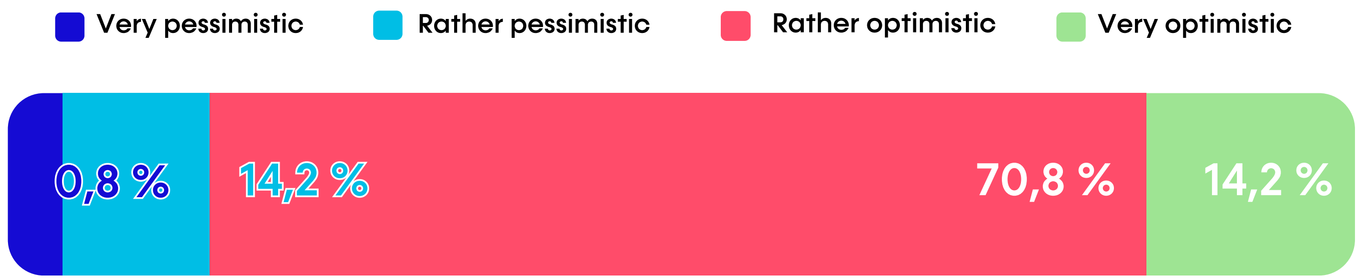
7,1% of companies were in acquisition discussions in 2022

73,3% of the discussions are with a French entity

CHAPTER 5 INTERNATIONAL

The outlook for the future of the French video game industry

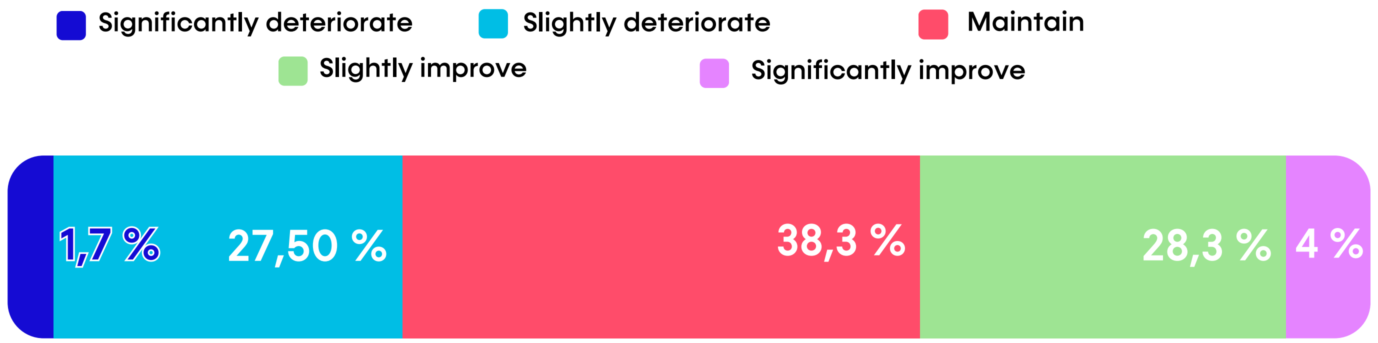
85% of companies are rather or very optimistic about the future of the French video game industry



The outlook on the companies' situation in the next 12 months

29% of companies believe that the situation of businesses will deteriorate

38% of companies believe the situation will remain the same; this figure was 27.8% in 2020



INSIGHT

The euphoria of 2020 has given way to a more mixed sentiment, and video game companies are less optimistic about the business situation (29% of companies believe the situation will deteriorate, compared to only 10.5% in 2020).

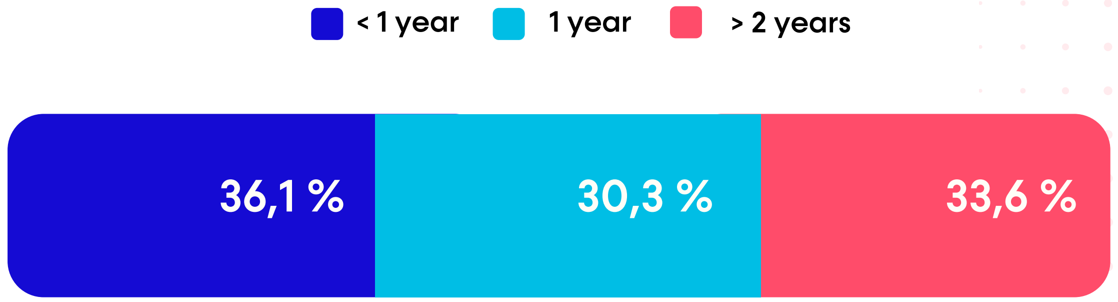
Only 28.6% of respondents believe that the companies' revenue will grow over the next 12 months (compared to 66% in 2020).

Financial visibility

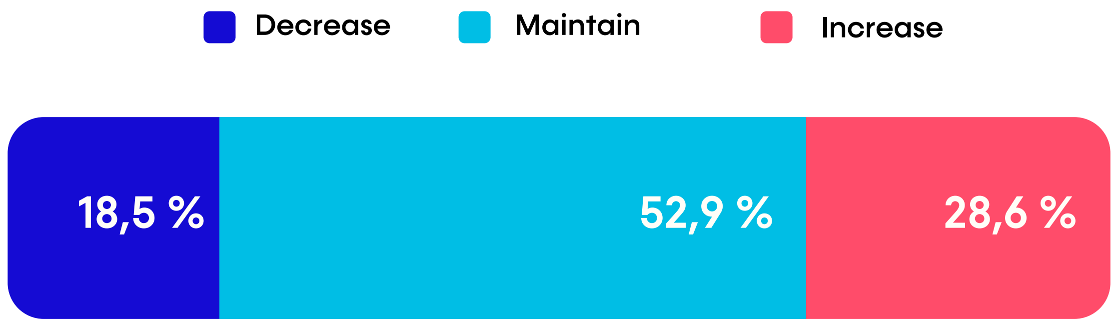
The companies' visibility remains low in the medium term.

66,4% of companies have a financial visibility of one year or less

33,6% of companies have a financial visibility of more than 2 years



The outlook on companies' revenue for the next 12 months

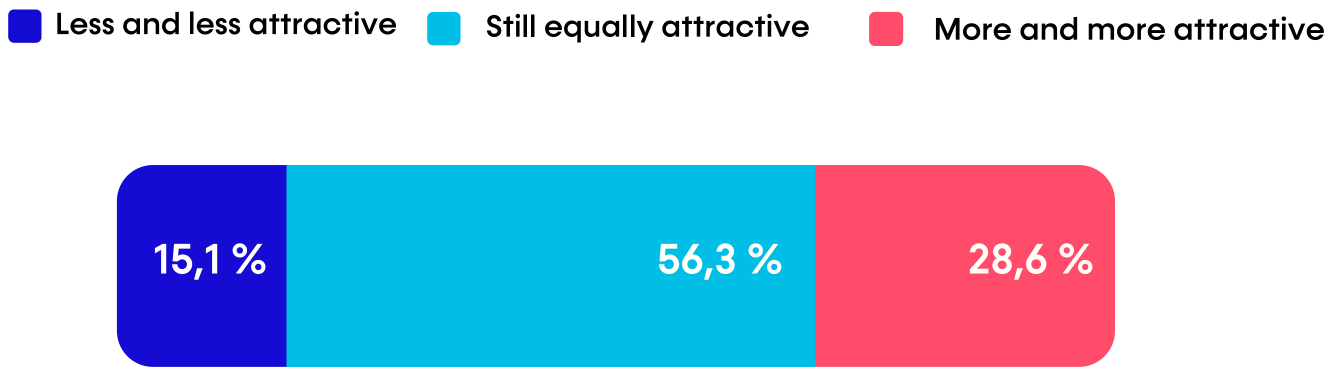


The evolution of France's attractiveness in 2022

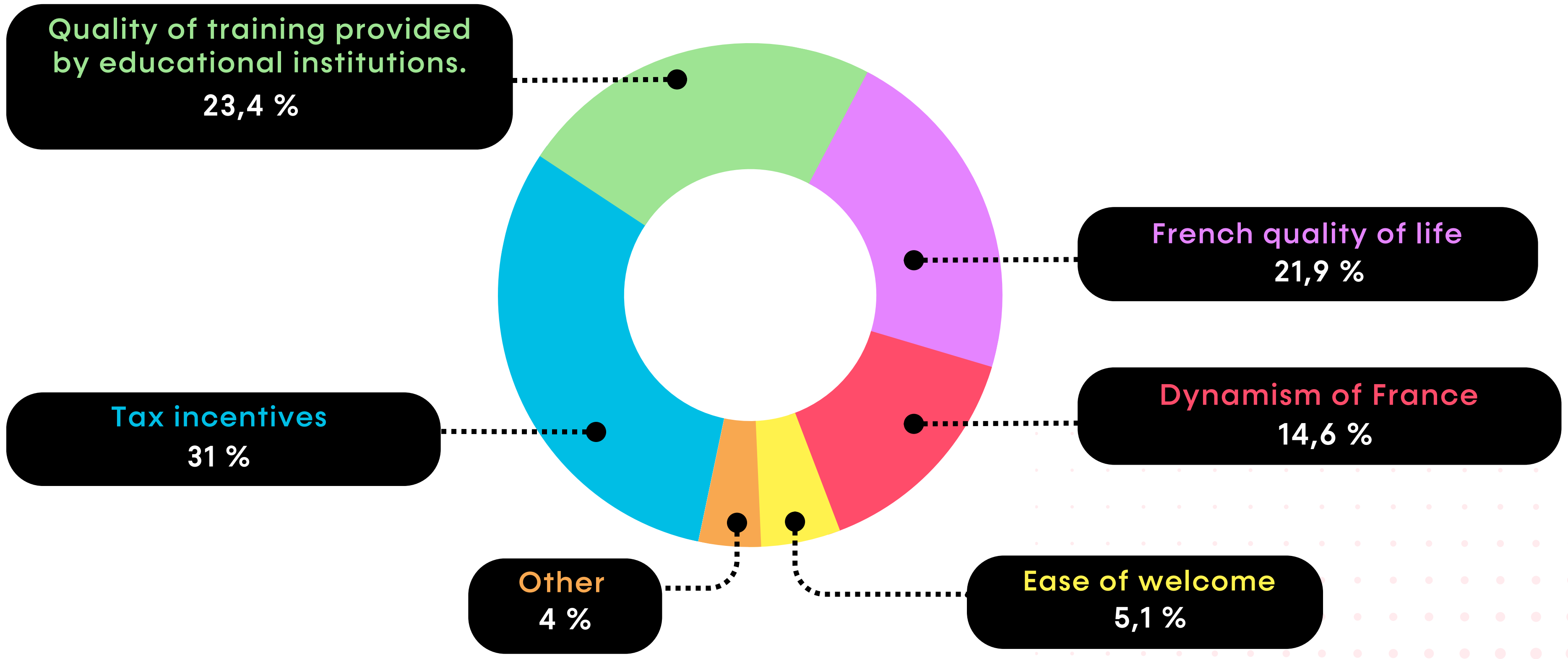
85% of companies

consider France to be an attractive territory in 2022

What do you think about the attractiveness of France in 2022 ?



Factors of attractiveness



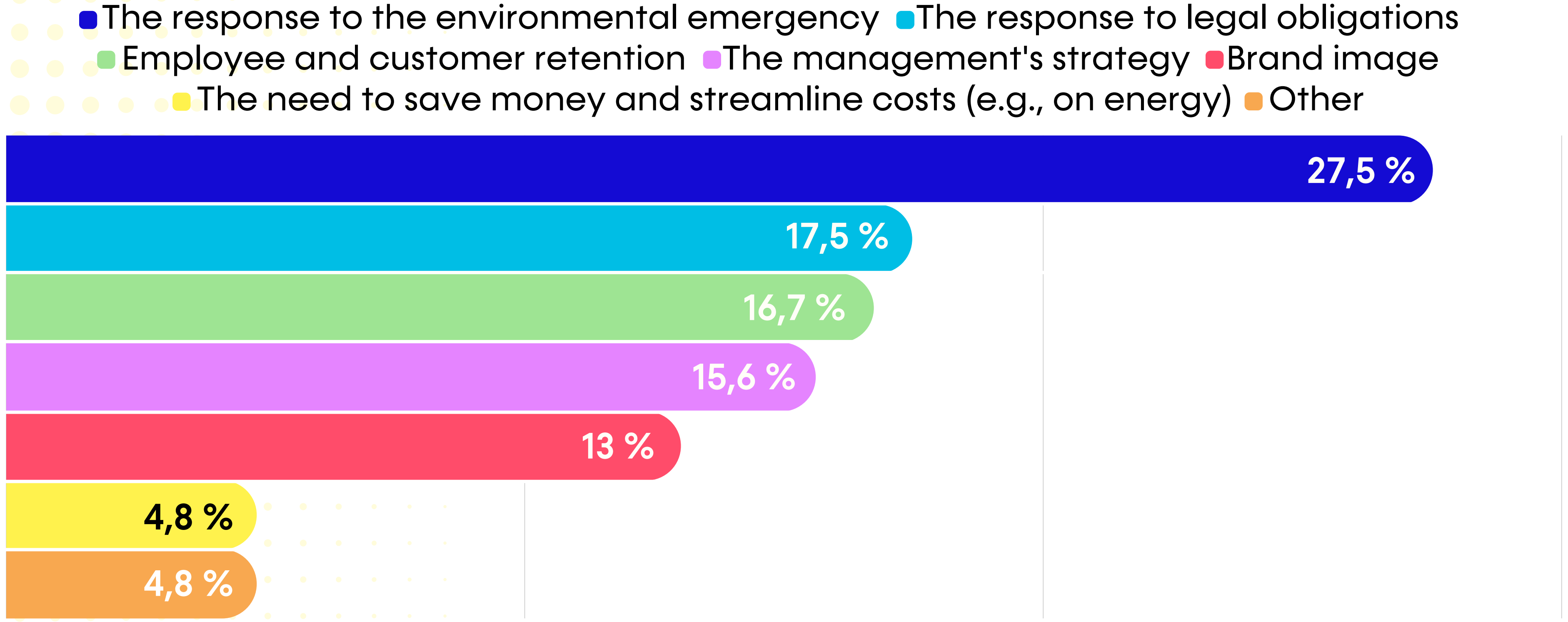
CHAPTER 6 CORPORATE SOCIAL RESPONSIBILITY

Is there a person dedicated to CSR within your organization?

23,7% of companies

have a person dedicated to CSR within their organization.

The motivating factors for implementing CSR initiatives within the organization



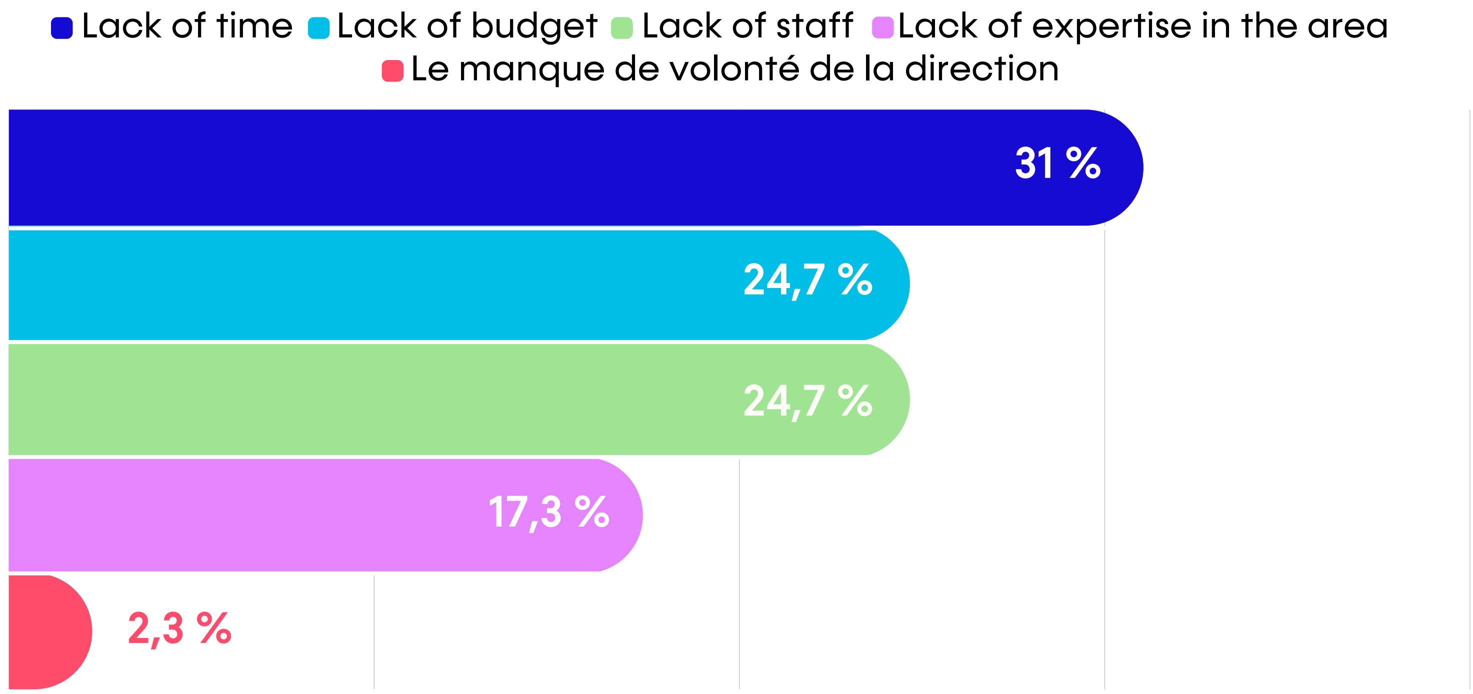
INSIGHT

Established in 2021, the National Video Game Consortium brings together the 8 regional associations as well as SNJV and SELL.

In a commitment to initiate the environmental transition of our sector, the consortium launched the Jyros project in 2022, the first environmental footprint calculator designed for French video game companies.

This initiative was supported by the French Government under the program 'Supporting Green Alternatives in Culture' of the ICC sector in France 2030.

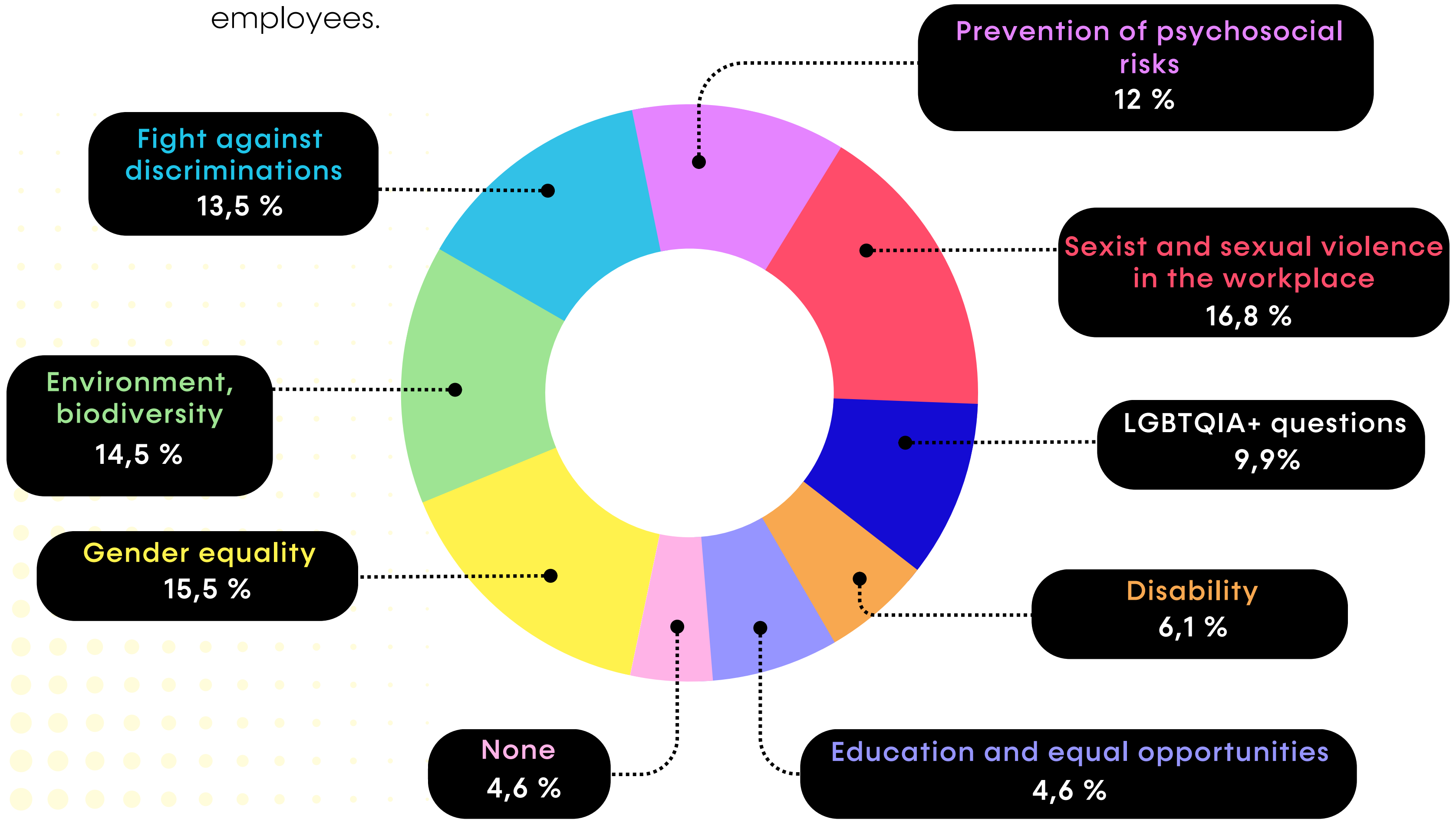
The obstacles to implementing CSR initiatives within the organization



The issues on which employees have already been sensitized

95% of companies

ave already raised awareness among their employees.



Have you conducted the carbon footprint assessment for your company?

10% of companies

have already conducted their company's carbon footprint assessment.

Do you plan to do it in 2023 ?

47,50% of companies

plan to conduct their carbon footprint assessment in 2023

Have you implemented actions for gender equality within your organization? If yes, what kind?

65,5% of companies

have already implemented actions for gender equality within their organization

34% of companies

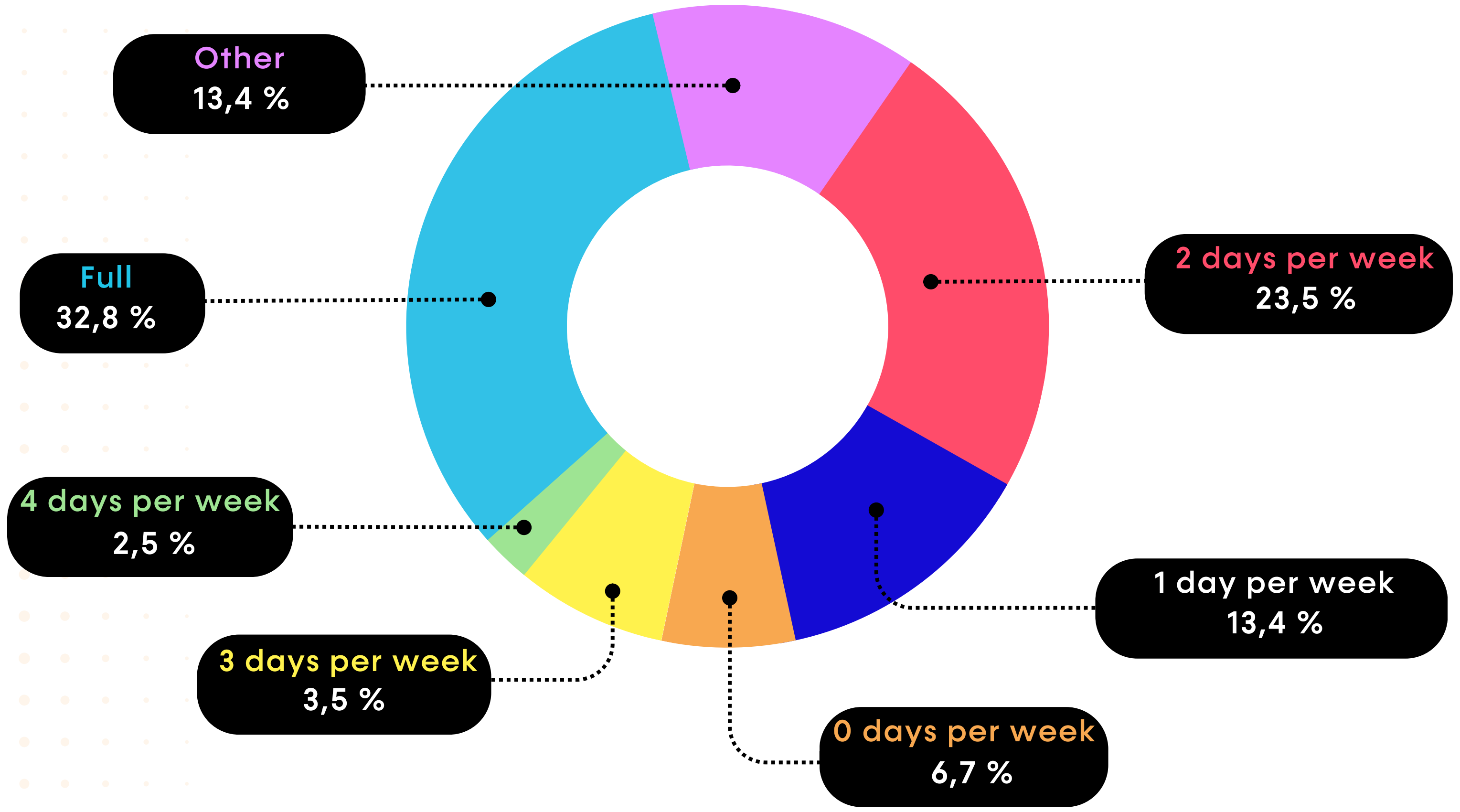
have implemented actions related to pay equality, 25% have taken actions against sexist and sexual violence in the workplace, and 7.3% have implemented actions related to menstrual leave

CHAPTER 7 REMOTE WORK AND FLEXIBILITY

The average frequency of remote work within the organizations

33% of companies have adopted a full-time remote work schedule

6% of companies do not offer remote work options to their employees



The chosen arrangements

46,6% of companies offer a fixed workspace per employee

47,5% offer a flexible model

INSIGHT

The Covid period has reshaped the organization of work within the production teams of development studios in France and around the world.

Remote work has now become a significant component of companies' salary policies.

Only 6% of companies do not offer remote work to their employees, and among those implementing remote work, in 72% of them, the days of presence are left to the discretion of the employees.

However, companies emphasize that this new arrangement accentuates the loss of social connection and team cohesion, and amplifies communication challenges.

Is remote work specified in the contract?

23,7% of companies

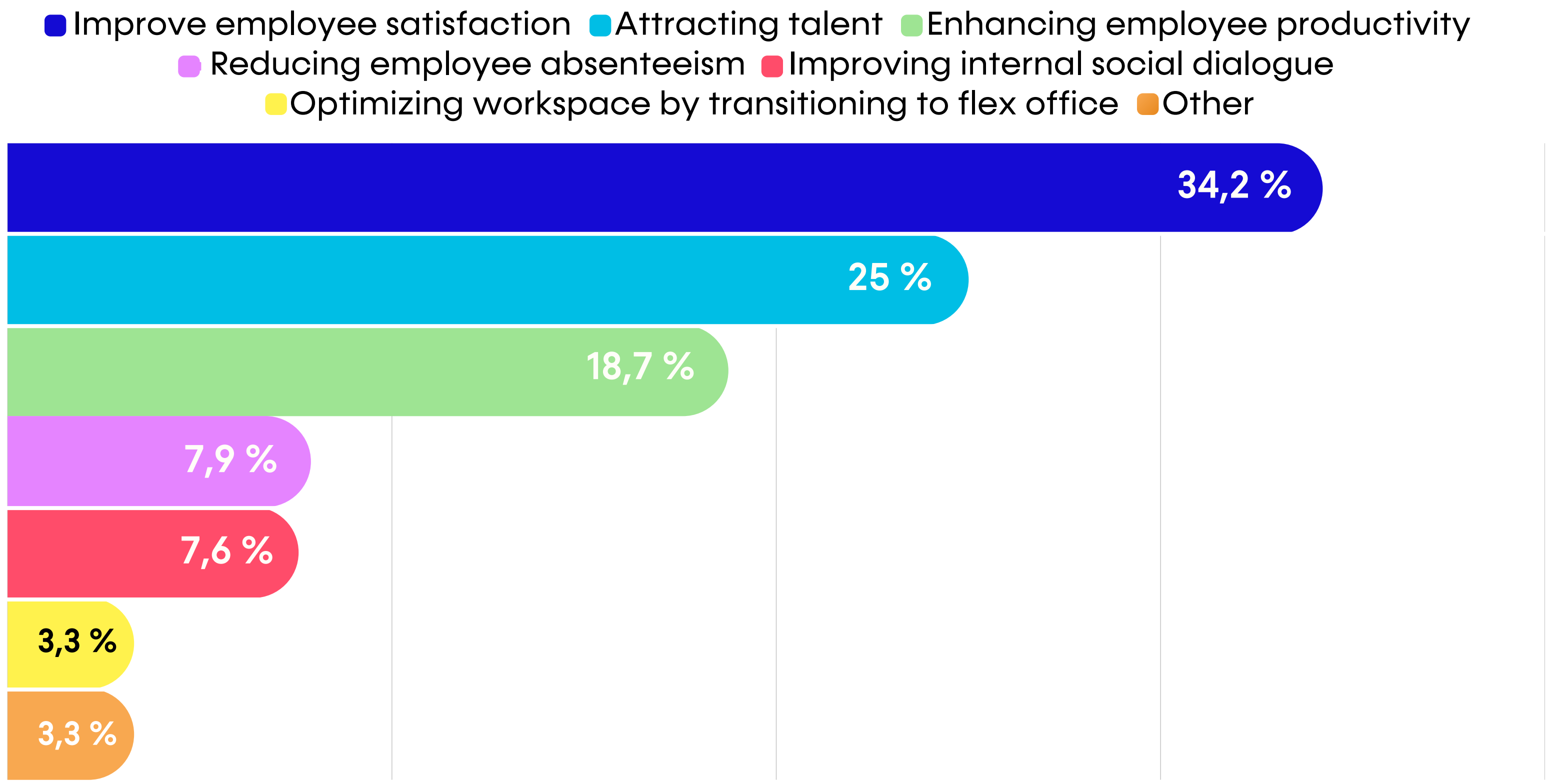
have not formalized remote work in contracts

Are employees required to be present in the office on certain days?

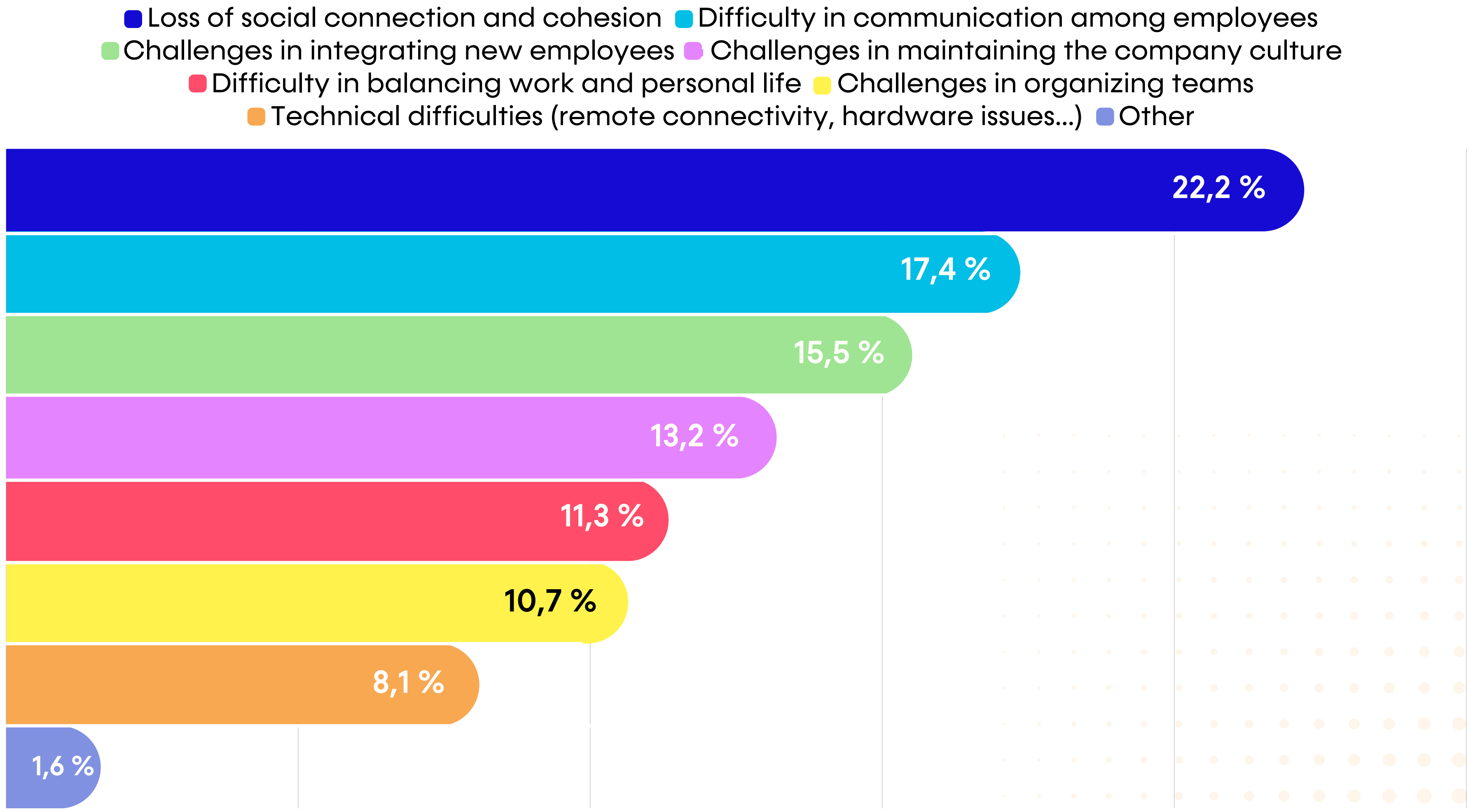
72% of companies

have not enforced specific days of presence for employees

The main benefits of remote work



The main challenges of remote work



SOURCING

N°	Page	Nom du graphe	Nombre de répondants
1		Types of games developed by the studios	133
2		Business models	133
3		Game distribution platforms	133
4		Number of games self-published by development studios	133
5		Average budget per game	131
6		Average development time per video game	133
7		Production financing mechanisms	133
8		Breakdown of workforce according to job category	123
9		Gender diversity in the industry	123
10		Proportion of women in leadership/supervisory positions	121
11		Workforce distribution by job type	121
12		Evolution of workforce in 2023	120
13		Hiring in 2023	116
14		Companies revenue	121
15		Financial position at the end of the fiscal year	121
16		The capital of the companies in 2022	123
17		The financing methods of companies	123
18		Access to bank credit	123
19		Fundraising rounds in 2022	101
20		Company acquisitions in 2022	86
21		Sources of acquisitions	82
22		Acquirers	27
23		Ongoing acquisitions	112

SOURCING

N°	Page	Nom du graphe	Nombre de répondants
24		Entities	86
25		Fundraising rounds in 2023	123
26		The outlook for the future of the French video game industry	120
27		The outlook on the companies' situation in the next 12 months	120
28		Financial visibility	119
29		The outlook on companies' revenue for the next 12 months	119
30		What do you think about the attractiveness of France in 2022 ?	119
31		The evolution of France's attractiveness in 2022	119
32		Factors of attractiveness	118
33		Is there a person dedicated to CSR within your organization?	118
34		The motivating factors for implementing CSR initiatives within the organization	107
35		The obstacles to implementing CSR initiatives within the organization	117
36		The issues on which employees have already been sensitized	116
37		Have you conducted the carbon footprint assessment for your company?	120
38		Do you plan to do it in 2023 ?	120
39		Have you implemented actions for gender equality within your organization?	119
40		Other actions	119
41		The average frequency of remote work within the organizations	104
42		The chosen arrangements	119
43		Is remote work specified in the contract?	118
44		Are employees required to be present in the office on certain days?	119
45		The main benefits of remote work	118
46		The main challenges of remote work	119

À PROPOS DU SNJV

Créé en 2008, le Syndicat National du Jeu Vidéo représente les entreprises et professionnels du jeu vidéo en France. Il œuvre pour la promotion, la croissance et la compétitivité de l'industrie et l'attractivité du territoire.

Le SNJV est la voix de l'industrie du jeu vidéo en France et l'interlocuteur des pouvoirs publics et des médias sur les sujets de la production.

L'objectif du SNJV est de permettre aux entreprises de production de jeux vidéo établies en France d'accélérer leur développement et de renforcer leur compétitivité dans un contexte de forte concurrence internationale.

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