2014

SALES, DEMOGRAPHIC, AND USAGE DATA

ESSENTIAL FACTS

ABOUT THE COMPUTER AND VIDEO GAME INDUSTRY

esa

entertainment®
software
association

"Our industry has a remarkable upward trajectory. Computer and video games are a form of entertainment enjoyed by a diverse, worldwide consumer base that demonstrates immense energy and enthusiasm for games. With an exciting new generation of hardware, outstanding software, and unmatched creativity, technology, and content, our industry will continue to thrive in the years ahead."

—Michael D. Gallagher, president and CEO,
   Entertainment Software Association

WHAT'S INSIDE

WHO IS PLAYING

AT PLAY

THE BOTTOM LINE

WHO WE ARE

OTHER RESOURCES

The *2014 Essential Facts About the Computer and Video Game Industry* was released by the Entertainment Software Association (ESA) in April 2014. The annual research was conducted by Ipsos MediaCT for ESA. The study is the most in-depth and targeted survey of its kind, gathering data from more than 2,200 nationally representative households. Heads of households, and the most frequent gamers within each household, were surveyed about their game play habits and attitudes.
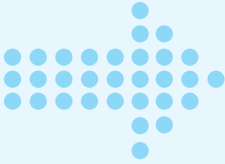
59%
of Americans play video games

There are an average of
TWO GAMERS
in each game-playing U.S. household

The average U.S. Household
OWNS AT LEAST ONE
dedicated game console, PC, or smartphone

> "People of all ages play video games. There is no longer a 'stereotype game player,' but instead a game player could be your grandparent, your boss, or even your professor."
>
> —*Jason Allaire, Ph.D., associate professor of psychology at North Carolina State University and co-director of the Gains Through Gaming Lab*

51%
of U.S. households own a dedicated game console, and those that do own an average of 2

Among American households that own a device used to play video games:

68%	53%	41%
PLAY GAMES ON A CONSOLE	PLAY GAMES ON A SMARTPHONE	PLAY GAMES ON A WIRELESS DEVICE

Smartphone and wireless device use
increased by **22%** and **37%**, respectively, over 2012

The average game player is **31** years old
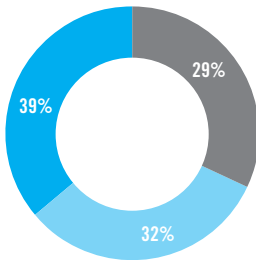
AGE
of Game Players

29%

39%

32%

29% under 18 years
32% 18-35 years
39% 36+ years
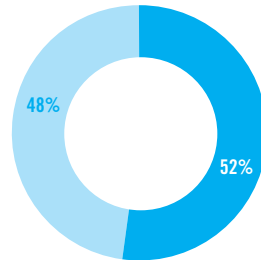
GENDER
of Game Players

48%

52%

52% male
48% female

Women age 18 or older represent a significantly greater portion of the game-playing population (36%) than boys age 18 or younger (17%)

The number of female gamers age 50 and older increased by 32% from 2012 to 2013

The average number of years gamers have been playing video games: **14**

Adult gamers have been playing for an average of 16 years, with adult men averaging 18 years and adult women averaging 13 years

WHO BUYS COMPUTER AND VIDEO GAMES?

The average age of the most frequent game purchaser:

35

Of the most frequent game purchasers

Male
Purchasers **50%** **50%** Female
Purchasers
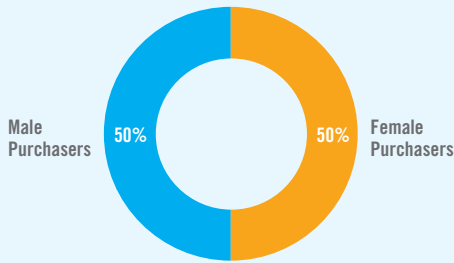
44%

of game players state that computer and video games give them the most value for their money, compared with DVDs, music, or going out to the movies

48%

of gamers said the quality of game graphics, an interesting storyline, a sequel to a favorite game, or word of mouth was the most important factor in their decision to purchase a computer or video game

21%

of gamers said the price was the most important factor in their decision to purchase a computer or video game

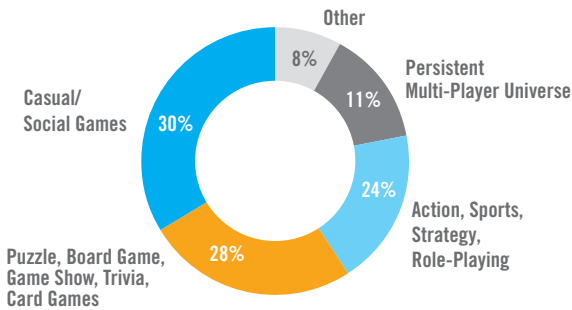Casual/social game play on mobile devices and online has increased significantly over the past year. Among most frequent gamers, social games are now the most popular genre, increasing in popularity by

55% from 2012 to 2013.

TYPES OF ONLINE GAMES PLAYED MOST OFTEN:

Other
8%

Persistent Multi-Player Universe
11%

Casual/ Social Games
30%

Action, Sports, Strategy, Role-Playing
24%

Puzzle, Board Game, Game Show, Trivia, Card Games
28%

44% of gamers play on their smartphone

33% of gamers play on their wireless device

TYPES OF MOBILE GAMES PLAYED MOST OFTEN:

Persistent Multi-Player Universe
4%

Casual/ Social Games
46%

Action, Sports, Strategy, Role-Playing
11%

Other
9%

Puzzle, Board Game, Game Show, Trivia, Card Games
31%
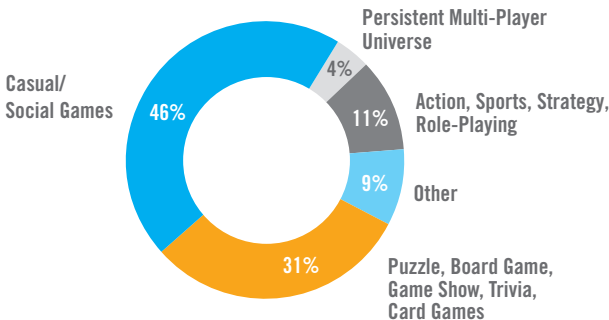
Gamers who are playing more video games than they did three years ago are spending <u>less</u> time:
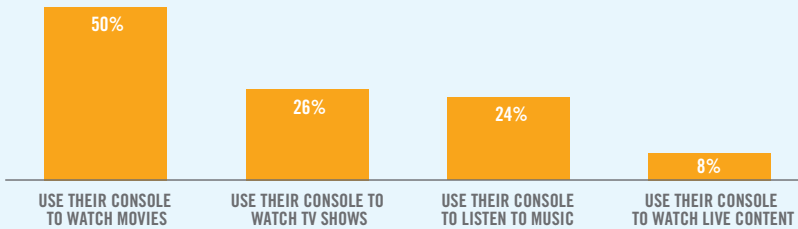
48% watching TV

47% going to the movies

47% watching movies at home

Gamers who own dedicated game consoles use them for other entertainment media, in addition to playing games:

50%			
26%			
24%			
8%			

USE THEIR CONSOLE TO WATCH MOVIES

USE THEIR CONSOLE TO WATCH TV SHOWS

USE THEIR CONSOLE TO LISTEN TO MUSIC

USE THEIR CONSOLE TO WATCH LIVE CONTENT

62% of gamers play games with others, either in-person or online

77% of gamers play with others at least one hour per week

47% of gamers play social games

A majority of gamers play games with their friends and family members:

18% play with parents

32% play with other family members

42% play with friends

14% play with their spouse or significant other

88%
of parents whose children play games believe the ESRB rating system is either very or somewhat helpful in choosing games for their children

85%
of parents are aware of the ESRB rating system

> **"All games, by their very nature, have a deep relationship to the core STEM skills of logic and reason, empiricism, the scientific method."**
>
> *—Frank Lantz, director of the Game Center at New York University*

PARENTS CONTROL WHAT THEIR KIDS PLAY

87%
of parents believe that the parental controls available in all new video game consoles are useful. Further, parents impose time usage limits on video games more than any other form of entertainment:

83%
of parents place time limits on video game playing

80%
of parents place time limits on Internet usage

76%
of parents place time limits on television viewing

70%
of parents place time limits on movie viewing

Of the games rated by ESRB in 2013:

46%
received an E (Everyone) rating

19%
received an E10+ (Everyone 10+) rating

23%
received a T (Teen) rating

12%
received an M (Mature) rating

[7]

91%

of parents whose children play games are present when games are purchased or rented

82%

of children receive their parents' permission before purchasing or renting a game

95%

of parents pay attention to the content of the games their children play

> "You create these communities around the game that do an incredible amount of intellectual work, and when they're done with the work, they will leave the game and go on to another game that's more challenging. Can you imagine if we had that kind of environment in classrooms?"
>
> — *Constance Steinkuehler Squire, associate professor in digital media and co-director of the Games+Learning+Society Center at the University of Wisconsin-Madison, and former senior policy analyst in the White House Office of Science and Technology Policy*

56%

of parents say video games are a positive part of their child's life

Families with Children Under 18 at Home See Benefits of Playing Computer and Video Games:

68%

BELIEVE GAME PLAY PROVIDES MENTAL STIMULATION OR EDUCATION

58%

BELIEVE GAME PLAY HELPS TO CONNECT WITH FRIENDS

55%

BELIEVE GAME PLAY HELPS THE FAMILY SPEND TIME TOGETHER

42%
of parents whose children are gamers play computer and video games with their children at least weekly

58%
of parents whose children are gamers play with their children at least monthly

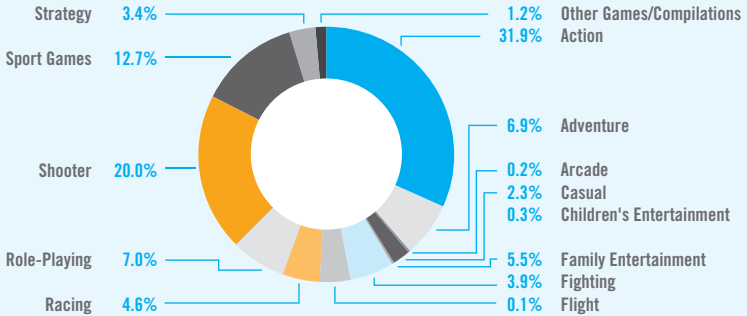## TOP ❺ REASONS PARENTS PLAY GAMES WITH THEIR KIDS:

❶ It's fun for the entire family: 88%

❷ Because they're asked to: 84%

❸ It's a good opportunity to socialize with their child: 75%

❹ It's a good opportunity to monitor game content: 61%

❺ They enjoy playing video games as much as their child does: 47%

"Games provide a wonderful platform for intergenerational play and learning. Kids often take the lead in showing their moms what they know how to do in the game—they are the experts! This gives both moms and their children a chance to interact and learn together, which we know from a developmental perspective has great benefits."

—*Katie Salen, executive director of Institute of Play*

Best-Selling VIDEO GAME Super Genres by Units Sold, 2013

Strategy **3.4%**

Sport Games **12.7%**

Shooter **20.0%**

Role-Playing **7.0%**

Racing **4.6%**

1.2% Other Games/Compilations
31.9% Action

6.9% Adventure

0.2% Arcade
2.3% Casual
0.3% Children's Entertainment

5.5% Family Entertainment
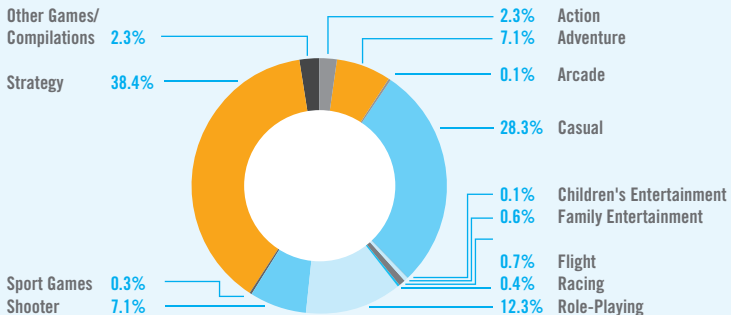**3.9%** Fighting
0.1% Flight

Source: The NPD Group/Retail Tracking Service

> **"I consider video games a form of design that is amazingly important today and that is going to become even more important in the future, because it is a way we interact with machines and screens."**
> — *Paola Antonelli, senior curator of the Museum of Modern Art's department of architecture and design*

Best-Selling COMPUTER GAME Super Genres by Units Sold, 2013

Other Games/
Compilations **2.3%**

Strategy **38.4%**

Sport Games **0.3%**
Shooter **7.1%**

2.3% Action
7.1% Adventure

0.1% Arcade

28.3% Casual

0.1% Children's Entertainment
0.6% Family Entertainment

0.7% Flight
0.4% Racing
12.3% Role-Playing

Source: The NPD Group/Retail Tracking Service

TOP 20 SELLING VIDEO GAMES OF 2013
BY UNITS SOLD

RANK	TITLE	ESRB RATING
1	GRAND THEFT AUTO V	MATURE
2	CALL OF DUTY: GHOSTS	MATURE
3	MADDEN NFL 25	EVERYONE
4	BATTLEFIELD 4	MATURE
5	ASSASSIN'S CREED IV: BLACK FLAG	MATURE
6	NBA 2K14	EVERYONE
7	CALL OF DUTY: BLACK OPS II	MATURE
8	JUST DANCE 2014	EVERYONE 10+
9	MINECRAFT	EVERYONE 10+
10	DISNEY INFINITY	EVERYONE 10+
11	FIFA 14	EVERYONE
12	INJUSTICE: GODS AMONG US	TEEN
13	SKYLANDERS SWAP FORCE	EVERYONE 10+
14	POKEMON X	EVERYONE
15	THE LAST OF US	MATURE
16	POKEMON Y	EVERYONE
17	NBA 2K13	EVERYONE
18	BIOSHOCK INFINITE	MATURE
19	LEGO MARVEL SUPER HEROES	EVERYONE 10+
20	BATMAN: ARKHAM ORIGINS	TEEN

Source: The NPD Group/Retail Tracking Service

TOP 20 SELLING COMPUTER GAMES OF 2013
BY UNITS SOLD

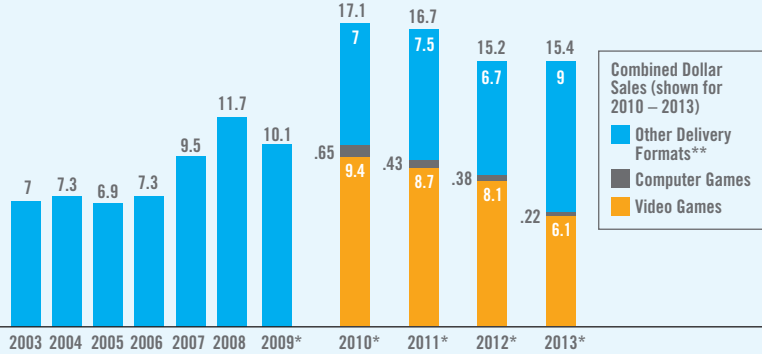| RANK	TITLE	ESRB RATING
1	STARCRAFT II: HEART OF THE SWARM EXPANSION PACK	TEEN
2	SIM CITY 2013	EVERYONE 10+
3	THE SIMS 3: UNIVERSITY LIFE EXPANSION PACK	TEEN
4	THE SIMS 3: STARTER PACK	TEEN
5	THE SIMS 3	TEEN
6	THE SIMS 3: ISLAND PARADISE EXPANSION PACK	TEEN
7	STARCRAFT II: WINGS OF LIBERTY	TEEN
8	WORLD OF WARCRAFT: MISTS OF PANDARIA EXPANSION PACK	TEEN
9	DIABLO III	MATURE
10	THE SIMS 3: SUPERNATURAL EXPANSION PACK	TEEN
11	THE SIMS 3 SEASONS EXPANSION PACK	TEEN
12	THE SIMS 3: PETS	TEEN
13	ELDER SCROLLS V: SKYRIM	MATURE
14	CIVILIZATION V	EVERYONE 10+
15	BATTLEFIELD 4	MATURE
16	FINAL FANTASY XIV ONLINE: A REALM REBORN	TEEN
17	GUILD WARS 2	TEEN
18	AGE OF EMPIRES 2	TEEN
19	WORLD OF WARCRAFT: BATTLE CHEST	TEEN
20	AMAZING HIDDEN OBJECT GAMES 3 PACK	EVERYONE 10+

Source: The NPD Group/Retail Tracking Service

U.S. Computer and Video Game DOLLAR Sales Growth

DOLLARS IN BILLIONS*

|		
	Combined Dollar Sales (shown for 2010 – 2013)	
	Other Delivery Formats**	
	Computer Games	
	Video Games	

Source: The NPD Group/Retail Tracking Service; Games Market Dynamics: U.S.

* Figures include total consumer spend

** Other delivery formats include subscriptions, digital full games, digital add-on content, mobile apps, social network gaming and other physical delivery. 2003-2009 figures are sales of new physical content at retail exclusively.

U.S. Computer and Video Game UNIT Sales Growth

UNITS IN MILLIONS*

Combined Computer and Video Game Unit Sales (shown for 2009 – 2013)	
Computer Games	
Video Games	
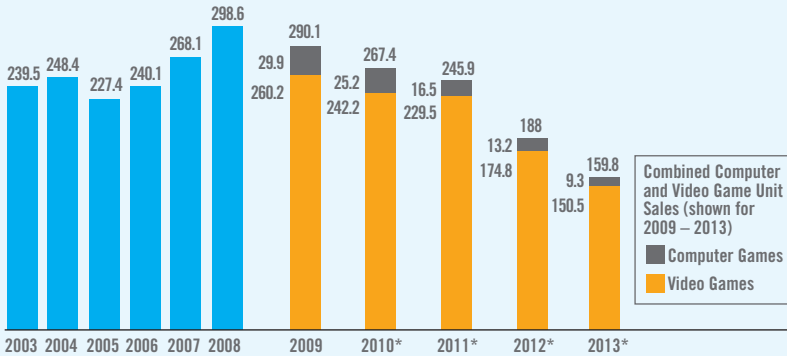
Source: The NPD Group/Retail Tracking Service; Games Market Dynamics: U.S.

* Figures are sales of new physical content at retail exclusively

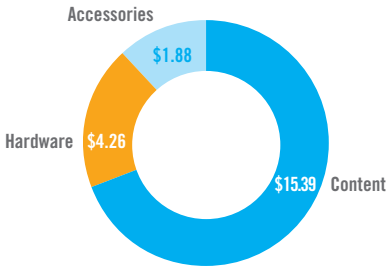## Total Consumer Spend on Games Industry 2013

DOLLARS IN BILLIONS

Accessories $1.88

Hardware $4.26

$15.39 Content

TOTAL:
$21.53
BILLION

Source: The NPD Group/Games Market Dynamics: U.S.

> "I would say the evolution of video games has been very rapid. Because video games rely so much on technology and innovations, the possibilities of video games have been very quickly transforming before our eyes."
>
> *— Christian Adame, assistant curator for the Phoenix Art Museum, one of 10 museums to host the Smithsonian Institution's traveling "The Art of Video Games" exhibition, on the advancement of video games*

Recent Digital* and Physical Sales Information

2010	2011	2012	2013
71%	68%	59%	47%
29%	32%	41%	53%

■ TOTAL PHYSICAL FORMAT
■ TOTAL DIGITAL FORMAT
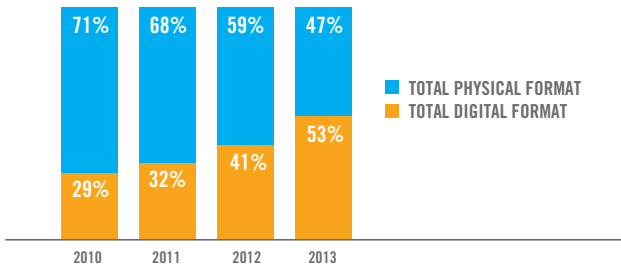
Source: The NPD Group/Games Market Dynamics: U.S

*Digital format sales include subscriptions, digital full games, digital add-on content, mobile apps and social network gaming

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ABOUT THE ENTERTAINMENT SOFTWARE ASSOCIATION

ESA offers services to interactive entertainment software publishers, including conducting business and consumer research, providing legal and policy analysis and advocacy on First Amendment, intellectual property and technology/e-commerce issues, managing a global content protection program, owning and operating E3, and representing video game industry interests in federal and state government relations. For more information, please visit www.theESA.com or follow us on Twitter: twitter.com/RichatESA.

ESA MEMBERS AS OF MARCH 2014

345 GAMES	**www.spike.com/press/shows/345-games**
505 GAMES	**www.505games.com**
ACTIVISION BLIZZARD	**www.activisionblizzard.com**
BANDAI NAMCO GAMES AMERICA INC.	**www.namcobandaigames.com/home.html**
CAPCOM USA, INC.	**www.capcom.com/us/**
DEEP SILVER INC.	**www.deepsilver.com/us/home/**
DENA	**www.dena.jp/intl/**
DISNEY INTERACTIVE STUDIOS, INC.	**http://games.disney.com/video-games**

WHO WE ARE

ELECTRONIC ARTS	www.ea.com
EPIC GAMES, INC.	www.epicgames.com
FOCUS HOME INTERACTIVE	www.focus-home.com
GLOOPS INTERNATIONAL, INC.	www.gloops.com/en
KONAMI DIGITAL ENTERTAINMENT AMERICA	www.konami.com
LEVEL-5 INC.	www.level5ia.com
LITTLE ORBIT	www.littleorbit.com
MAD CATZ INTERACTIVE, INC.	www.madcatz.com
MICROSOFT CORPORATION	www.xbox.com
NATSUME INC.	www.natsume.com
NEXON AMERICA INC.	www.nexon.net
NINTENDO OF AMERICA INC.	www.nintendo.com
NIVAL	http://en.nival.com
NVIDIA	www.nvidia.com
SEGA OF AMERICA, INC.	www.sega.com
SLANG	www.slang.vg
SONY COMPUTER ENTERTAINMENT AMERICA	www.us.playstation.com
SONY ONLINE ENTERTAINMENT, INC.	www.soe.com/home
SQUARE ENIX, INC.	http://na.square-enix.com/us/home
TAKE-TWO INTERACTIVE SOFTWARE, INC.	www.take2games.com
TECMO KOEI AMERICA CORPORATION	www.tecmokoeiamerica.com
TENCENT	www.tencent.com/en-us/
TRION WORLDS, INC.	www.trionworlds.com/en/
UBISOFT ENTERTAINMENT, INC.	www.ubisoftgroup.com
WARGAMING	www.wargaming.com
WARNER BROS. INTERACTIVE ENTERTAINMENT INC.	www.warnerbros.com/videogames
XSEED GAMES	www.xseedgames.com

**For more information about ESA and its programs,
please visit www.theESA.com**

ENTERTAINMENT SOFTWARE RATING BOARD (ESRB) | WWW.ESRB.ORG

The ESRB is a non-profit, self-regulatory body established in 1994 by ESA. ESRB independently assigns computer and video game content ratings, enforces advertising guidelines, and helps ensure responsible online privacy practices for the interactive entertainment software industry.

ACADEMY OF INTERACTIVE ARTS & SCIENCES (AIAS) | WWW.INTERACTIVE.ORG

The AIAS was founded in 1996 as a not-for-profit organization whose mission is to promote, advance, and recognize common interests and outstanding achievements in the interactive arts and sciences. The AIAS conducts its annual awards show, the Interactive Achievement Awards, to promote and acknowledge exceptional accomplishments in the field. To further enhance awareness of the AIAS's vision, the organization created the D.I.C.E. (Design, Innovate, Communicate, Entertain) Summit in 2002, a once yearly conference dedicated to exploring approaches to the creative process and artistic expression as they uniquely apply to the development of interactive entertainment. With more than 24,000 members, including Electronic Arts, Microsoft, Sony, Nintendo, Ubisoft, THQ, Day One Studios, Epic Games, and Insomniac Games, the AIAS promotes the creativity and craftsmanship of video games worldwide.

INTERNATIONAL GAME DEVELOPERS ASSOCIATION (IGDA) | WWW.IGDA.ORG

The IGDA is the largest non-profit membership organization serving individuals who create video games. The IGDA advances the careers and enhances the lives of game developers by connecting members with their peers, promoting professional development, and advocating on issues that affect the developer community. These core activities advance games as a medium and game development as a profession.

THE NPD GROUP, INC. | WWW.NPD.COM

The NPD Group provides global information and advisory services to drive better business decisions. By combining unique data assets with unmatched industry expertise, we help our clients track their markets, understand consumers, and drive profitable growth. Sectors covered include automotive, beauty, consumer electronics, entertainment, fashion, food / foodservice, home, luxury, mobile, office supplies, sports, technology, toys, and video games.

VIDEO GAME VOTERS NETWORK (VGVN) | WWW.VIDEOGAMEVOTERS.ORG

The VGVN is a grassroots organization of voting-age gamers who organize and take action in support of computer and video games. Since its creation in 2006, more than 500,000 grassroots activists have joined the VGVN.

esa entertainment® software association