

2015

SALES, DEMOGRAPHIC AND USAGE DATA

ESSENTIAL FACTS

ABOUT THE COMPUTER
AND VIDEO GAME
INDUSTRY



entertainment[®]
software
association

“Video games are ingrained in our culture. Driven by some of the most innovative minds in the tech sector, our industry’s unprecedented leaps in software and hardware engages and inspires our diverse global audience. Our artists and creators continue to push the entertainment envelope, ensuring that our industry will maintain its upward trajectory for years to come.”

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



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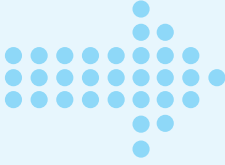
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The 2015 Essential Facts About the Computer and Video Game Industry was released by the Entertainment Software Association (ESA) in April 2015. The annual research was conducted by Ipsos MediaCT for ESA. The study is the most in-depth and targeted survey of its kind, gathering data from more than 4,000 American households. Heads of households and the most frequent gamers within each household were surveyed about their game play habits and attitudes.



155 million

Americans play video games

There are an average of

TWO GAMERS

in each game-playing U.S. household



FOUR OUT OF FIVE

U.S. households own a device used to play video games

“The [video game] industry is producing a steady stream of games that continue to expand their nature and impact – they can be artistic, social, and collaborative, with many allowing massive numbers of people from all over the world to participate simultaneously.”

—*The New Media Consortium's 2014 K-12 Horizon Report*

51%

of U.S. households own a dedicated game console

42%

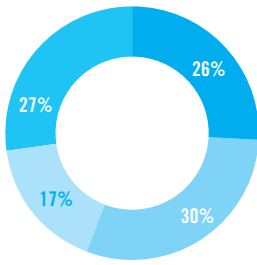
of Americans play video games regularly (3 hours or more per week)

WHO IS PLAYING



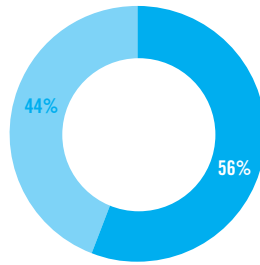
GAMER DEMOGRAPHICS

The average game player is **35** years old



AGE

of Game Players
26% under 18 years
30% 18-35 years
17% 36-49 years
27% 50+ years



GENDER

of Game Players
56% male
44% female

Women age 18 or older represent a significantly greater portion of the game-playing population (33%) than boys age 18 or younger (15%)

The most frequent FEMALE GAME PLAYER is on average **43** years old and the average MALE GAME PLAYER is **35** years old

The average number of years gamers have been playing video games: **13**

WHO IS BUYING



GAMER PURCHASING

WHO BUYS COMPUTER AND VIDEO GAMES?

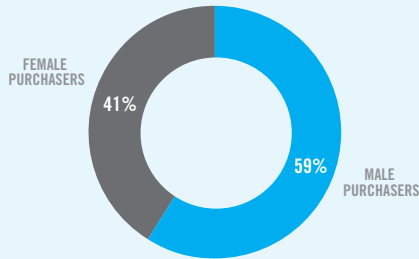
37

is the average age of the most frequent game purchaser

29%

of the most frequent game players currently pay to play video games online

Of the most frequent game purchasers:



THE MOST FREQUENT GAMER FEELS THAT COMPUTER AND VIDEO GAMES PROVIDE MORE VALUE FOR THEIR MONEY (47%) COMPARED TO DVDS (28%), GOING TO MOVIES (14%), AND MUSIC (12%)

“Games offer immediate feedback, you can see your progress, you can try something and be frustrated but later learn more... that’s why game play is so engaging to us.”

—Barbara Chamberlin, project director at the New Mexico State University Learning Games Lab



39%

of the most frequent gamers play social games

Top three types of video games that the most frequent gamers play most often:

31%

Social Games

30%

Action

30%

Puzzle/Board Game/Card Game/Game Shows

TOP DEVICES MOST FREQUENT GAMERS USE TO PLAY GAMES:

PC (62%), DEDICATED GAME CONSOLE (56%),
SMARTPHONE (35%), WIRELESS DEVICE (31%),
DEDICATED HANDHELD SYSTEM (21%)

Top three types of video games that the most frequent gamers play most often on their wireless or mobile devices:

31%

Social Games

14%

Puzzle/Board Game/
Card Game/Game Shows

5%

Action



Gamers who are playing more video games than they did three years ago are spending less time:

39%

watching TV

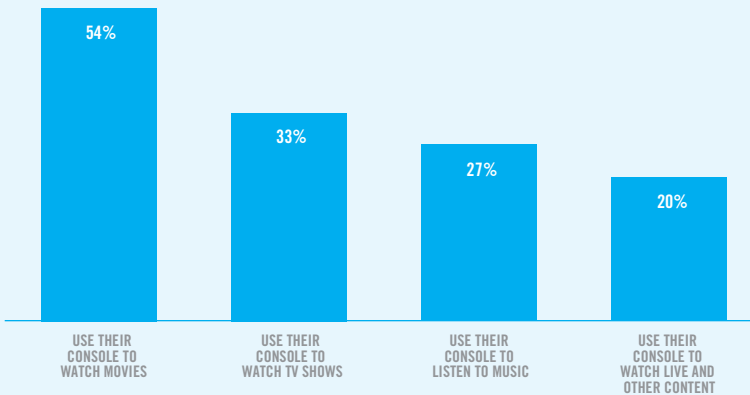
40%

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:



The most frequent gamers who play with others spend an average of

6.5 Hours

per week playing with others online

5 Hours

per week playing with others in-person



56%

of the most frequent gamers play with others, including:

42%

friends

21%

family members

16%

parents

15%

spouse/partner

“Millennials are putting [video games] at the center of their entertainment preferences, but it is a new kind of gaming that is more social, interactive and engaging.”

— Neil Howe, president of LifeCourse Associates and leading researcher on millennials

54%

of the most frequent gamers play a multiplayer mode at least weekly

54%

of the most frequent game players feel video games help them connect with friends

45%

feel video games help them spend time with family



69%

of parents regularly check a game's rating before making a purchase

84%

of parents are aware of the ESRB rating system

PARENTS CONTROL WHAT THEIR KIDS PLAY

91%

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:

79%

of parents place time limits on video game playing

72%

of parents place time limits on Internet usage

70%

of parents place time limits on TV viewing

66%

of parents place time limits on movie viewing

Of the games rated by ESRB in 2014:



41%

received an E (Everyone) rating



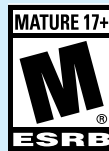
21%

received an E10+ (Everyone 10+) rating



23%

received a T (Teen) rating



14%

received an M (Mature) rating

**91%**

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

90%

require their children to get permission before buying or renting a video game

94%

of parents always or sometimes pay attention to the video games their child plays

63%

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

59%

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

TOP 5 REASONS PARENTS PLAY GAMES WITH THEIR KIDS:

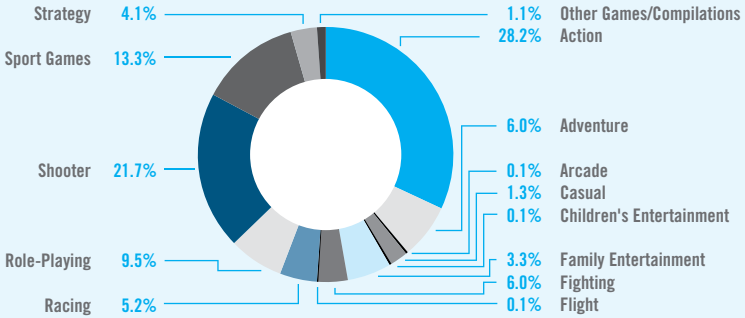
- 1 It's fun for the entire family: 85%
- 2 Because they're asked to: 75%
- 3 It's a good opportunity to socialize with their child: 75%
- 4 It's a good opportunity to monitor game content: 58%
- 5 They enjoy playing video games as much as their child does: 54%

THE BOTTOM LINE



TOP SELLERS

Best-Selling VIDEO GAME Super Genres by Units Sold, 2014

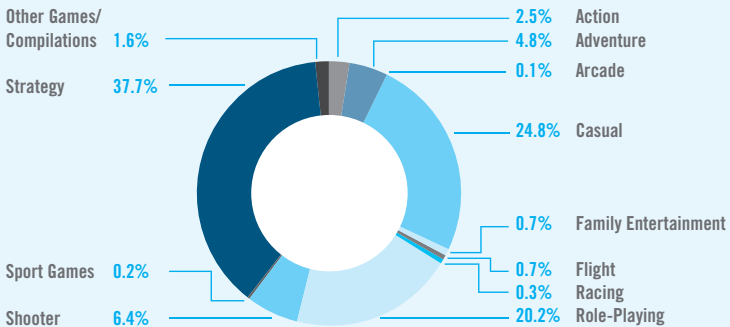


Source: The NPD Group/Retail Tracking Service

“Video games are complex systems composed of rules that interact. Gamers must think like a designer and form hypotheses about how the rules interact so they can accomplish goals and even bring about emergent results. Thinking like a designer in order to understand systems is a core 21st-century skill.”

— Dr. James Paul Gee, Mary Lou Fulton Presidential Professor of Literacy Studies at Arizona State University

Best-Selling COMPUTER GAME Super Genres by Units Sold, 2014



Source: The NPD Group/Retail Tracking Service

THE BOTTOM LINE



TOP SELLERS

TOP 20 SELLING VIDEO GAMES OF 2014

BY UNITS SOLD

RANK	TITLE	ESRB RATING
1	CALL OF DUTY: ADVANCED WARFARE	MATURE
2	MADDEN NFL 15	EVERYONE
3	DESTINY	TEEN
4	GRAND THEFT AUTO V	MATURE
5	MINECRAFT	EVERYONE 10+
6	SUPER SMASH BROS.	EVERYONE 10+
7	NBA 2K15	EVERYONE
8	WATCH DOGS	MATURE
9	FIFA 15	EVERYONE
10	CALL OF DUTY: GHOSTS	MATURE
11	TITANFALL	MATURE
12	LEGO MARVEL SUPER HEROES	EVERYONE 10+
13	THE LEGO MOVIE VIDEOGAME	EVERYONE 10+
14	FAR CRY 4	MATURE
15	DISNEY INFINITY 2.0	EVERYONE 10+
16	NBA 2K14	EVERYONE
17	MARIO KART 8	EVERYONE
18	JUST DANCE 2015	EVERYONE 10+
19	MIDDLE EARTH: SHADOW OF MORDOR	MATURE
20	BATTLEFIELD 4	MATURE

Source: The NPD Group/Retail Tracking Service

TOP 20 SELLING COMPUTER GAMES OF 2014

BY UNITS SOLD

RANK	TITLE	ESRB RATING
1	THE SIMS 4	TEEN
2	THE SIMS 3: STARTER PACK	TEEN
3	DIABLO III: REAPER OF SOULS	MATURE
4	THE ELDER SCROLLS ONLINE	MATURE
5	WORLD OF WARCRAFT: WARLORDS OF DRAENOR EXPANSION PACK	TEEN
6	DIABLO III	MATURE
7	TITANFALL	MATURE
8	THE SIMS 3: ISLAND PARADISE EXPANSION PACK	TEEN
9	THE SIMS 3 SEASONS EXPANSION PACK	TEEN
10	ELDER SCROLLS V: SKYRIM	MATURE
11	THE SIMS 3: UNIVERSITY LIFE EXPANSION PACK	TEEN
12	THE SIMS 3: PETS	TEEN
13	THE SIMS 3: INTO THE FUTURE EXPANSION PACK	TEEN
14	ELDER SCROLLS ANTHOLOGY	TEEN-MATURE
15	DRAGON AGE: INQUISITION	MATURE
16	STARCRRAFT II: WINGS OF LIBERTY	TEEN
17	THE SIMS 3: SUPERNATURAL EXPANSION PACK	TEEN
18	WORLD OF WARCRAFT: BATTLE CHEST 2013	TEEN
19	CIVILIZATION V	EVERYONE 10+
20	STARCRRAFT II: HEART OF THE SWARM EXPANSION PACK	TEEN

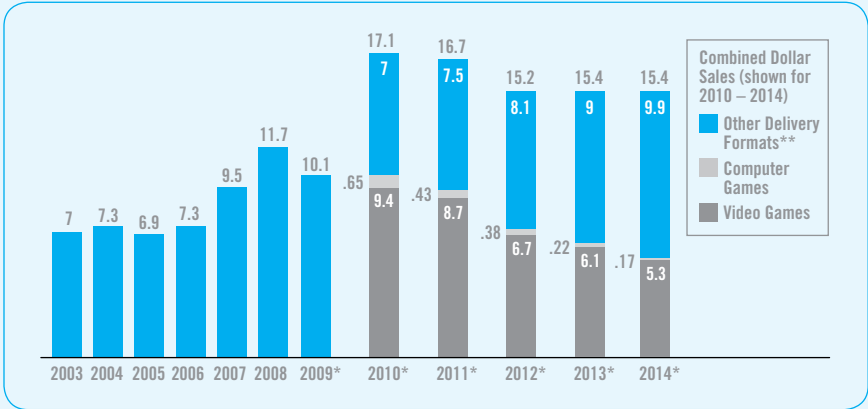
Source: The NPD Group/Retail Tracking Service

THE BOTTOM LINE

SALES INFORMATION

U.S. Computer and Video Game DOLLAR Sales

DOLLARS IN BILLIONS

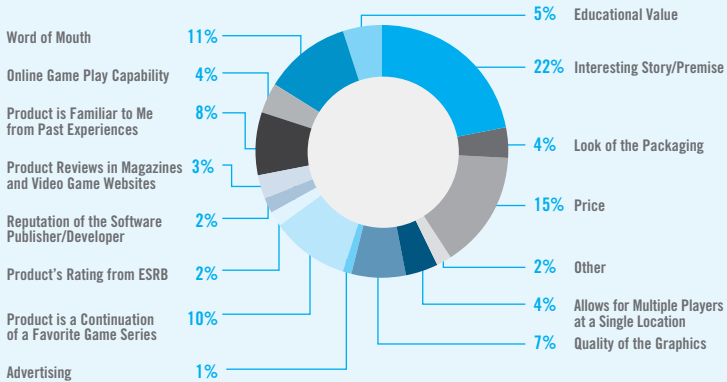


Source: The NPD Group/Retail Tracking Service; Games Market Dynamics: U.S.

* 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.

Factors influencing decisions to purchase video games:



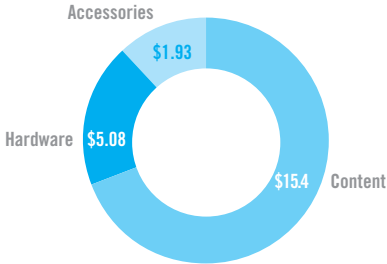
THE BOTTOM LINE



TOTAL CONSUMER SPEND ON GAMES INDUSTRY

Total Consumer Spend on Games Industry 2014

DOLLARS IN BILLIONS



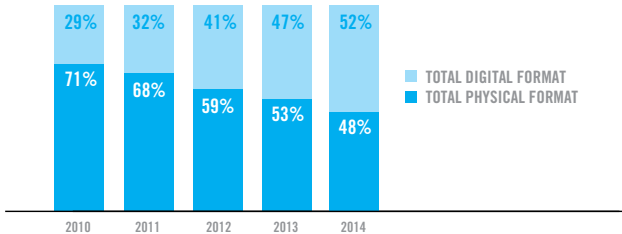
TOTAL:
\$22.41
BILLION

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

“If it weren’t for video game enthusiasts and the absolute commercial need to keep them happy with ever-better graphics requiring ever-higher processor speeds, complex computer graphics would still be found only in the high-priced domains of the business and science world.”

— *Ralph Baer, inventor of the Brown Box and pioneer of the home video game console*

Recent Digital* and Physical Sales Information



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

The Entertainment Software Association (ESA) conducts business and consumer research, provides analysis and advocacy on issues like global content protection, intellectual property, technology, e-commerce and the First Amendment in support of interactive software publishers. ESA owns and operates E3 and represents video game industry interests on federal and state levels. To learn more, visit TheESA.com and follow us on Twitter: @RichatESA or AESAGovAffairs.

ESA MEMBERS AS OF MARCH 2015

345 GAMES	www.spike.com/press/shows/345-games
505 GAMES	www.505games.com
ACTIVISION BLIZZARD, INC.	www.activisionblizzard.com
BANDAI NAMCO GAMES AMERICA INC.	www.namcobandaigames.com/home.html
CAPCOM CO., LTD.	www.capcom.com/us/
DEEP SILVER INC.	www.deepsilver.com/us/home/
DISNEY INTERACTIVE STUDIOS, INC.	www.games.disney.com/video-games

WHO WE ARE

ELECTRONIC ARTS, INC.	www.ea.com
EPIC GAMES, INC.	www.epicgames.com
FOCUS HOME INTERACTIVE	www.focus-home.com
GREY BOX	www.greybox.com/
GUNGHO ONLINE ENTERTAINMENT AMERICA, INC.	www.gunghoonline.com
KONAMI DIGITAL ENTERTAINMENT AMERICA	www.konami.com
LEVEL-5 INC.	www.level5ia.com
LITTLE ORBIT, LLC	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
NVIDIA	www.nvidia.com
SLANG	www.slang.vg
SONY COMPUTER ENTERTAINMENT AMERICA LLC	www.us.playstation.com
SQUARE ENIX LTD.	www.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/
UBISOFT, INC.	www.ubisoftgroup.com
WARGAMING PUBLIC COMPANY, LTD.	www.wargaming.com
WARNER BROS. INTERACTIVE ENTERTAINMENT INC.	www.warnerbros.com/videogames
XSEED GAMES	www.xseedgames.com

OTHER RESOURCES



ESA PARTNERS

Learn more about the ESA and its programs at www.theESA.com.

ENTERTAINMENT SOFTWARE RATING BOARD | WWW.ESRB.ORG

The Entertainment Software Rating Board (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 | WWW.INTERACTIVE.ORG

The Academy of Interactive Arts & Sciences (AIAS) was founded in 1996 as a not-for-profit organization to recognize outstanding achievements in interactive entertainment. The AIAS conducts the annual D.I.C.E. Awards to promote and acknowledge exceptional accomplishments in the field. In 2002 the Academy created the D.I.C.E. Summit dedicated to exploring approaches to the creative process and artistic expression as they uniquely apply to the development of interactive entertainment.

INTERNATIONAL GAME DEVELOPERS ASSOCIATION | WWW.IGDA.ORG

The International Game Developers Association (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

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VIDEO GAME VOTERS NETWORK | WWW.VIDEOGAMEVOTERS.ORG

The Video Game Voters Network (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 FOUNDATION | WWW.ESAFUNDATION.ORG

Created by the American entertainment software industry, the ESA Foundation works to make a positive difference in the lives of America's youth by providing scholarships to the next generation of industry innovators and supporting charitable organizations and schools that leverage entertainment software and technology to create educational opportunities. ESA Foundation is primarily supported by proceeds from its signature annual fundraiser, "Nite to Unite – for Kids" and other charitable initiatives.



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