2011

SALES, DEMOGRAPHIC AND USAGE DATA

ESSENTIAL FACTS

ABOUT THE COMPUTER AND VIDEO GAME INDUSTRY

esa

entertainment software association

"It is critical that we support economic sectors that create jobs, develop innovative technologies and keep America competitive in the global marketplace. The video game industry is one of those important, high-tech economic drivers. Our industry generates over $25 billion in annual revenue, and directly and indirectly employs more than 120,000 people with an average salary for direct employees of $90,000."

—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 2011 Essential Facts About the Computer and Video Game Industry was released by the Entertainment Software Association (ESA) at E3 2011. The annual research was conducted by Ipsos MediaCT for the ESA. The study is the most in-depth and targeted survey of its kind, gathering data from almost 1,200 nationally representative households that have been identified as owning either or both a video game console or a personal computer used to run entertainment software.

WHO PLAYS COMPUTER AND VIDEO GAMES?

72%

**of American households
play computer or video games**

The average game player age is:

37

18%

29%

53%
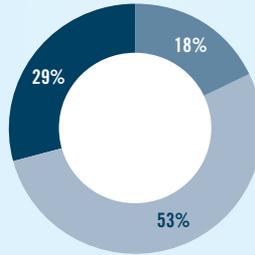
AGE
of Game Players

**18% under 18 years
53% 18-49 years
29% 50+ years**

In 2011,

29%

of gamers were over the age of 50

"Being immersed in a video game, and having your brain stimulated, can encourage creative solutions and adaptations. These beneficial ideas and thoughts can then be applied to real life situations. The results can be surprisingly positive for individuals, communities, and society as a whole."

—Allen S. Weiss, M.D., president and CEO, NCH Healthcare System
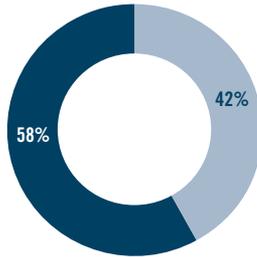
GENDER
of Game Players

58% male
42% female

58%
42%

Women age 18 or older represent a significantly greater portion of the game-playing population (37%) than boys age 17 or younger (13%)

WHO BUYS COMPUTER AND VIDEO GAMES?
The average age of the most frequent game purchaser is:

41

Of the most frequent game purchasers, 52% are male and 48% are female

"There are games now for pretty much every age, every demographic."
— Jesse Schell, professor of entertainment technology at Carnegie Mellon University

33%
of gamers say that playing computer or video games is their favorite entertainment activity

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Some of the top reasons why gamers purchase a computer or video game: quality of game graphics, an interesting storyline, a sequel to a favorite game, word of mouth

19% of most frequent game players pay to play online games

TYPES OF ONLINE GAMES PLAYED MOST OFTEN:

Other
8%

Downloadable Games
13%

Persistent
Multi-Player Universe
11%

Action, Sports, Strategy, Role-Playing
21%

Puzzle, Board Game,
Game Show, Trivia,
Card Games
47%
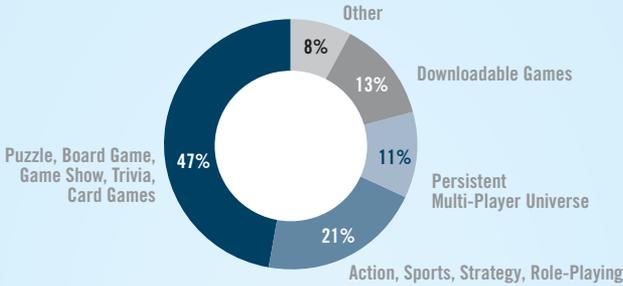
"Gaming is productive. It produces positive emotion, stronger social relationships, a sense of accomplishment, and for players who are a part of a game community, a chance to build a sense of purpose."

—Jane McGonigal, PhD, author of *Reality is Broken: Why Games Make Us Better and How They Can Change the World*

55% of gamers play games on their phones or handheld device

65%

of gamers play games with other gamers in person, an increase
from 64% in 2010 and from 62% in 2009

How long have gamers been playing?   **12** is the average number of years adult gamers have been playing computer or video games

Among most frequent gamers, males average
13 years of game playing, females average 10 years

91%
of the time parents are present
at the time games are
purchased or rented

86%
of the time children receive
their parents' permission before
purchasing or renting a game

**Nine out of 10 parents pay attention
to the content of the games their children play**

Parents See Positive Impact of Playing Computer and Video Games

68%
BELIEVE GAME PLAY PROVIDES
MENTAL STIMULATION OR
EDUCATION

57%
BELIEVE GAME PLAY HELPS
THE FAMILY SPEND TIME
TOGETHER

54%
BELIEVE GAME PLAY HELPS
TO CONNECT WITH
FRIENDS
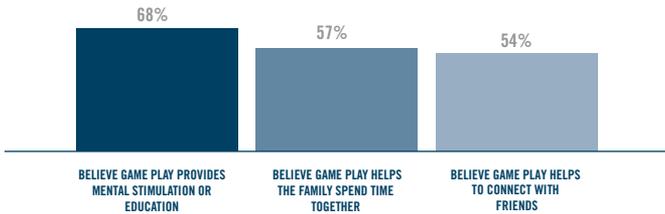
59%
of parents believe that computer and video games provide
more physical activity now than five years ago

> "Kids play video games for fun with the goal of progressing
> to the next level and eventually conquering the opponent,
> whether that's another player or the computer. What's more,
> the social aspect—sharing tactics, experiences, and
> explanations—helps cement what they've learned."
>
> -James Paul Gee, author of *What Video Games Have to Teach us
> About Learning and Literacy*

"Educational video games, handheld devices, and media production tools can allow young students to see how complex language and other symbol systems attach to the world."

—Michael Levine, executive director, The Joan Ganz Cooney Center at Sesame Workshop

98%
of parents are confident in the accuracy of ESRB ratings

86%
of parents are aware of the ESRB rating system

DO PARENTS CONTROL WHAT THEIR KIDS PLAY?

75%
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:

80% of parents place time limits on video game playing

74% of parents place time limits on Internet usage

70% of parents place time limits on television viewing

65% of parents place time limits on movie viewing

45%

**of parents play computer and video games
with their children at least weekly,
an increase from 36% in 2007**

TOP ❹ REASONS PARENTS PLAY WITH THEIR KIDS:

❶ Because they're asked to: 85%

❷ It's fun for the entire family: 84%

❸ It's a good opportunity to socialize with the child: 81%

❹ It's a good opportunity to monitor game content: 57%

> "The U.S. entertainment software industry is
at the forefront of innovation and education,
turning what we have thought about
video games on its head."
> —Rep. Debbie Wasserman Schultz, (D-Fla),
co-chair of the Congressional Caucus for Competitiveness
in Entertainment Technology

Best-Selling VIDEO GAME Super Genres by Units Sold, 2010

Casual **5.2%**
Strategy **3.8%**

Sport Games **16.3%**

Shooter **15.9%**

Role-Playing **7.7%**

Racing **5.8%**

2.7% Other Games, Compilations
21.7% Action
7.5% Adventure
0.2% Arcade
0.7% Children's Entertainment
9.1% Family Entertainment
3% Fighting
0.4% Flight
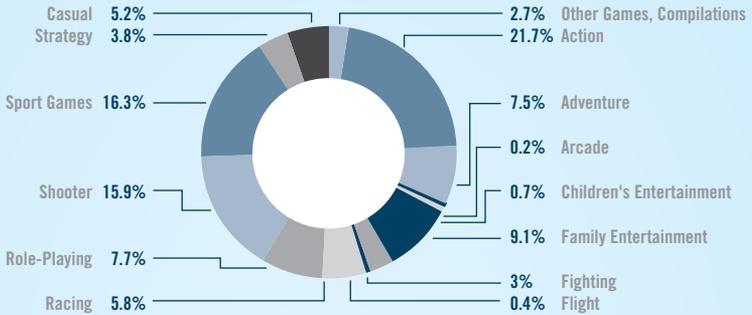
Source: The NPD Group/Retail Tracking Service

2010 Computer and Video Game Sales by Rating
BY UNITS SOLD

44% EVERYONE (E)

12.3% EVERYONE 10+ (E10+)

19.5% TEEN (T)

24% MATURE (M)
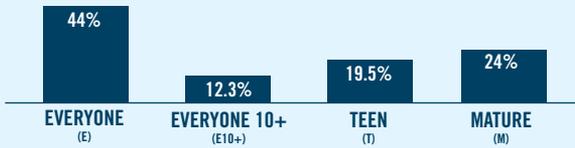
Source: The NPD Group/Retail Tracking Service

Best-Selling COMPUTER GAME Super Genres by Units Sold, 2010

Shooter **9.7%**

Strategy **33.6%**

Action **2.7%**
Adventure **8.7%**

0.9% Sport Games
1.5% Flight
0.9% Children's Entertainment
1.4% Other Games, Compilations
0.1% Arcade
20.3% Role-Playing
0.6% Racing
0.1% Family Entertainment
19.5% Casual
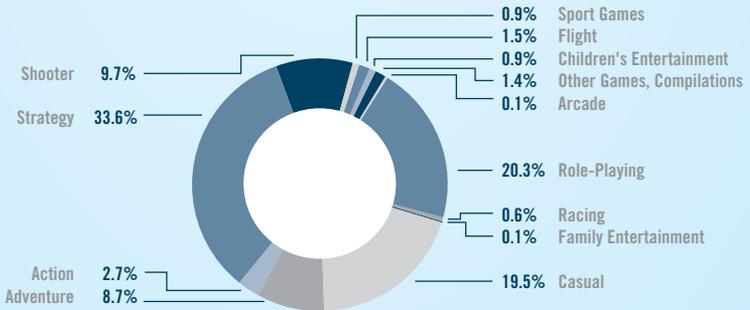
Source: The NPD Group/Retail Tracking Service

TOP 20 **VIDEO** GAMES OF 2010
BY UNITS SOLD

Rank	Title	Platform	ESRB Rating
1	CALL OF DUTY: BLACK OPS	360, PS3, Wii, NDS	Mature
2	MADDEN NFL 11	360, PS3, Wii, PS2, PSP	Everyone
3	HALO: REACH	360	Mature
4	NEW SUPER MARIO BROS. WII	Wii	Everyone
5	RED DEAD REDEMPTION	360, PS3	Mature
6	WII FIT PLUS	Wii	Everyone
7	JUST DANCE 2	Wii	Everyone 10+
8	CALL OF DUTY: MODERN WARFARE 2	360, PS3	Mature
9	ASSASSIN'S CREED: BROTHERHOOD	360, PS3	Mature
10	NBA 2K11	360, PS3, Wii, PS2, PSP	Everyone
11	BATTLEFIELD: BAD COMPANY 2	360, PS3	Mature
12	SUPER MARIO GALAXY 2	Wii	Everyone
13	POKEMON SOULSILVER VERSION	NDS	Everyone
14	MARIO KART W/WHEEL	Wii	Everyone
15	JUST DANCE	Wii	Everyone 10+
16	NEW SUPER MARIO BROS DS	NDS	Everyone
17	DONKEY KONG COUNTRY RETURNS	Wii	Everyone
18	WII SPORTS RESORT	Wii	Everyone
19	FALLOUT: NEW VEGAS	360, PS3	Mature
20	FINAL FANTASY XIII	360, PS3	Teen

Source: The NPD Group/Retail Tracking Service

## TOP 20 SELLING **COMPUTER** GAMES OF 2010
BY UNITS SOLD

RANK	TITLE	ESRB RATING
1	Starcraft II: Wings of Liberty	Teen
2	World Of Warcraft: Cataclysm Expansion Pack	Teen
3	The Sims 3	Teen
4	World Of Warcraft: Wrath of the Lich King Expansion Pack	Teen
5	Civilization V	Everyone 10+
6	World Of Warcraft: Cataclysm Expansion Pack Collector's Ed	Teen
7	The Sims 3: Ambitions Expansion Pack	Teen
8	World Of Warcraft: Battle Chest	Teen
9	Call Of Duty: Black Ops	Mature
10	The Sims 3: High-End Loft Stuff	Teen
11	Battlefield: Bad Company 2	Mature
12	The Sims 3: Late Night Expansion Pack	Teen
13	World Of Warcraft	Teen
14	The Sims 2 Double Deluxe	Teen
15	The Sims 3: World Adventures Expansion Pack	Teen
16	Starcraft II: Wings of Liberty Collector's Ed	Teen
17	Mass Effect 2	Mature
18	World Of Warcraft: Burning Crusade Expansion Pack	Teen
19	Fallout New Vegas	Mature
20	Starcraft: Battle Chest	Mature

Source: The NPD Group/Retail Tracking Service

U.S. Computer and Video Game **DOLLAR** Sales Growth

DOLLARS IN BILLIONS
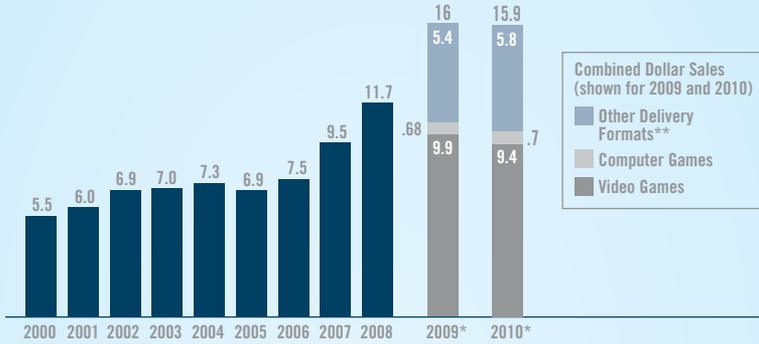
Year		
2000	5.5	
2001	6.0	
2002	6.9	
2003	7.0	
2004	7.3	
2005	6.9	
2006	7.5	
2007	9.5	
2008	11.7	
2009*	16	5.4 / .68 / 9.9
2010*	15.9	5.8 / .7 / 9.4

Combined Dollar Sales (shown for 2009 and 2010)
- Other Delivery Formats**
- Computer Games
- Video Games

Source: The NPD Group/Retail Tracking Service; Games Industry: Total Consumer Spend

  * 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. 2000-2008 figures are sales of new physical content at retail exclusively.

U.S. Computer and Video Game **UNIT** Sales Growth

UNITS IN MILLIONS*
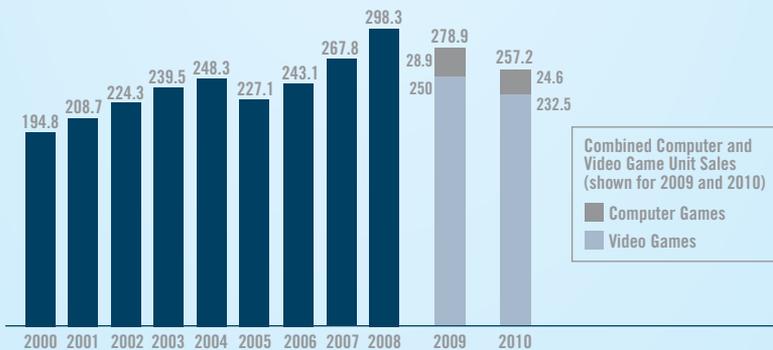
Year		
2000	194.8	
2001	208.7	
2002	224.3	
2003	239.5	
2004	248.3	
2005	227.1	
2006	243.1	
2007	267.8	
2008	298.3	
2009	278.9	28.9 / 250
2010	257.2	24.6 / 232.5

Combined Computer and Video Game Unit Sales (shown for 2009 and 2010)
- Computer Games
- Video Games

Source: The NPD Group/Retail Tracking Service; Games Industry: Total Consumer Spend

  * Figures are sales of new physical content at retail exclusively

Total Consumer Spend on Games Industry 2010

DOLLARS IN BILLIONS

Accessories

$2.94

Hardware $6.29

$15.90 Content
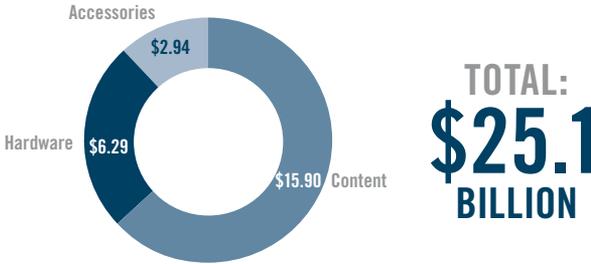
TOTAL:
$25.1
BILLION

Source: The NPD Group/Games Industry: Total Consumer Spend

> **This growing industry has generated more than 120,000 jobs in over 34 states and is a major international player as well. It's time Congress took notice."**
>
> **—Rep. Kevin Brady (R-TX), co-chair of the Congressional Caucus for Competitiveness in Entertainment Technology**

Recent Digital* and Physical Sales Information

2009	2010
20%	24%
80%	76%

■ **TOTAL DIGITAL FORMAT**
■ **TOTAL PHYSICAL FORMAT**
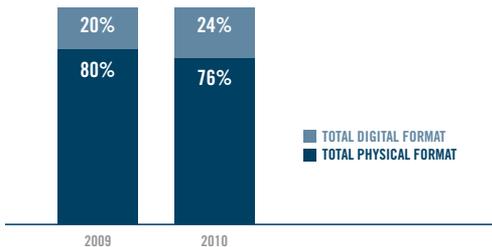
Source: The NPD Group/Games Industry: Total Consumer Spend

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

WHO WE ARE

ABOUT THE ENTERTAINMENT SOFTWARE ASSOCIATION

The ESA is the U.S. association dedicated to serving the business and public affairs needs of companies publishing interactive games for video game consoles, handheld devices, personal computers, and the Internet. The ESA offers services to interactive entertainment software publishers including a global anti-piracy program, owning the E3 Expo, business and consumer research, federal and state government relations, First Amendment and intellectual property protection efforts.

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

ESA Members
as of May, 2011

345 GAMES	www.spike.com/shows/deadliest-warrior-the-game
505 GAMES	www.505games.com
CAPCOM USA, INC.	www.capcom.com
CRAVE ENTERTAINMENT	www.cravegames.com
DEEP SILVER INC.	www.deepsilver.com
DISNEY INTERACTIVE STUDIOS, INC.	www.disney.go.com/disneyinteractivestudios/
EIDOS INTERACTIVE	www.eidos.com
ELECTRONIC ARTS	www.ea.com
EPIC GAMES, INC.	www.epicgames.com
HER INTERACTIVE, INC.	www.herinteractive.com
IGNITION ENTERTAINMENT, LTD.	www.ignition-ent.com/us
KONAMI DIGITAL ENTERTAINMENT AMERICA	www.konami.com
MICROSOFT CORPORATION	www.microsoft.com
NAMCO BANDAI GAMES AMERICA INC.	www.namcobandaigames.com
NATSUME INC.	www.natsume.com
NEXON AMERICA INC.	www.nexon.net
NINTENDO OF AMERICA INC.	www.nintendo.com
NVIDIA CORPORATION	www.nvidia.com
O-GAMES, INC.	http://usa.og-international.net
PERFECT WORLD ENTERTAINMENT	www.perfectworld.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.station.sony.com/en/
SQUARE ENIX, INC.	www.square-enix.com/na
TAKE-TWO INTERACTIVE SOFTWARE, INC.	www.take2games.com
TECMO KOEI AMERICA CORPORATION	www.tecmokoeiamerica.com
THQ, INC.	www.thq.com
TRION WORLD NETWORK, INC.	www.trionworlds.com
UBISOFT ENTERTAINMENT, INC.	www.ubisoftgroup.com
WARNER BROS. INTERACTIVE ENTERTAINMENT INC.	www.wbie.com
XSEED GAMES	www.xseedgames.com

For more information on the 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 the 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 Academy conducts its annual awards show, the Interactive Achievement Awards, to promote and acknowledge exceptional accomplishments in the field. To further enhance awareness of the Academy'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 Academy 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. 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 is the leading provider of reliable and comprehensive consumer and retail information for a wide range of industries. Today, more than 1,800 manufacturers, retailers, and service companies rely on NPD to help them drive critical business decisions at the global, national, and local market levels. NPD helps our clients to identify new business opportunities and guide product development, marketing, sales, merchandising, and other functions. Information is available for the following industry sectors: automotive, beauty, commercial technology, consumer technology, entertainment, fashion, food and beverage, foodservice, home, office supplies, software, sports, toys, and wireless.

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 300,000 grassroots activists have joined the VGVN.

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