

2012

SALES, DEMOGRAPHIC AND USAGE DATA

ESSENTIAL FACTS

ABOUT THE COMPUTER
AND VIDEO GAME
INDUSTRY



entertainment[®]
software
association

“Computer and video games have reached a critical mass. Today, nearly every device with a screen plays games, providing interactive entertainment experiences for a wide and diverse population. The creativity of our developers and publishers produces an ever-expanding variety of games to choose from in different formats and across all platforms. Their innovations drive consumer demand for our products, solidifying our industry’s position as one of the strongest and most cutting-edge sectors in the U.S. economy.”

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



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The 2012 Essential Facts About the Computer and Video Game Industry was released by the Entertainment Software Association (ESA) at E3 2012. 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 2,000 nationally representative households.

WHO IS PLAYING



GAMER DEMOGRAPHICS



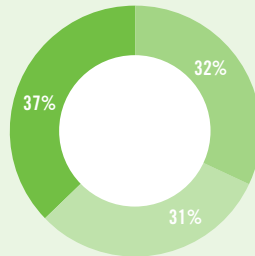
The average U.S. Household
OWNS AT LEAST ONE
dedicated game console, PC or smartphone

49%

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

The average game player age is:

30



AGE of Game Players

32% under 18 years
31% 18-35 years
37% 36+ years

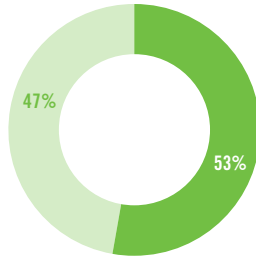
“What we’re seeing in games is art at a world-class stage design that is almost unmatched anywhere else. It has been very exciting to me to see so many ideas that integrate social good and efforts to make the world a better place into games.”

—Al Gore, former vice president and co-founder and chairman of
Generation Investment Management

WHO IS PLAYING



GAMER DEMOGRAPHICS



GENDER

of Game Players

53% male
47% female

Women 18 or older represent a significantly greater portion of the game-playing population (30%) than boys age 17 or younger (18%)

WHO BUYS COMPUTER AND VIDEO GAMES?

The average age of the most frequent game purchaser is:

35

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

42%

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

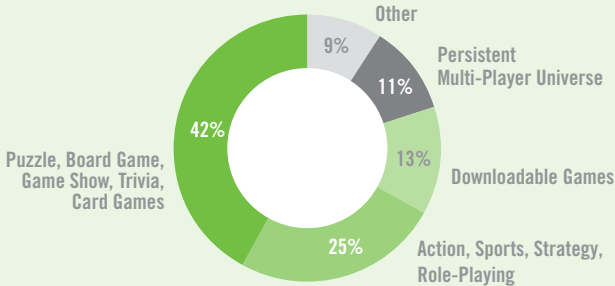
46%

of gamers have purchased or plan to purchase one or more games in 2012

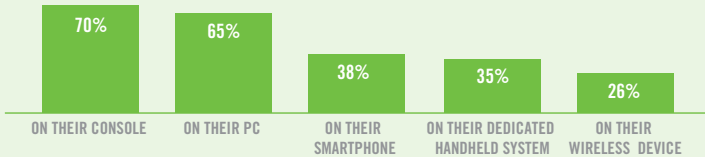
Some of the top reasons gamers say they purchase a computer or video game: quality of game graphics, an interesting storyline, a sequel to a favorite game, word of mouth

15% of most frequent game players pay to play online games

TYPES OF ONLINE GAMES PLAYED MOST OFTEN:

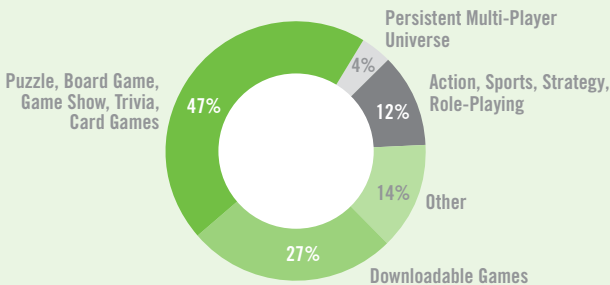


U.S. households that own a dedicated game console, PC, smartphone, dedicated handheld system or wireless device play games



Gamers play on-the-go: 33% play games on their smartphones, and 25% play games on their handheld device

TYPES OF MOBILE GAMES PLAYED MOST OFTEN:



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

59%
playing
board games

50%
going to
the movies

47%
watching
TV

47%
watching movies
at home

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

40%
use their console
to watch movies

20%
use their console
to listen to music

17%
use their console to
watch TV shows

62%

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

78%

of gamers who play with others do
so at least one hour per week

33%

of gamers play social games

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

16%
play with
parents

34%
play with other
family members

40%
play with friends

17%
play with their spouse
or significant other

12 is the average number of years gamers have been playing video games

Adult gamers have been playing for an average of 14 years;
males average 16 years of game play, females average 12 years

98%

of parents feel 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

DO PARENTS CONTROL WHAT THEIR KIDS PLAY?

73%

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:

84% of parents place time limits on video game playing

79% of parents place time limits on Internet usage

78% of parents place time limits on television viewing

72% of parents place time limits on movie viewing

90%

of the time parents are present when games are purchased or rented

82%

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

91% of parents pay attention to the content of the games their children play



40%

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

59%

play with their children at least monthly

TOP 5 REASONS PARENTS PLAY WITH THEIR KIDS:

- 1 It's fun for the entire family: 90%
- 2 Because they're asked to: 85%
- 3 It's a good opportunity to socialize with their child: 79%
- 4 It's a good opportunity to monitor game content: 56%
- 5 They enjoy playing video games as much as their child does: 48%

52%

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

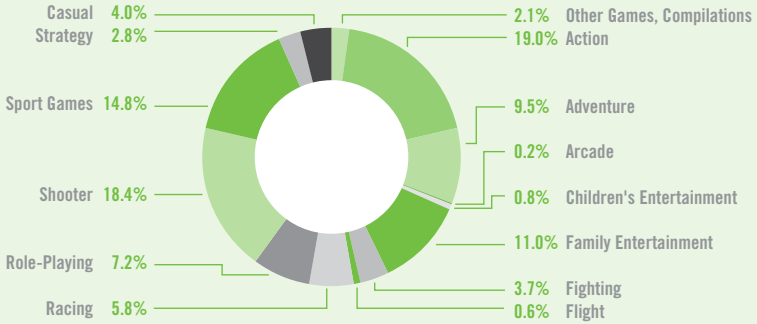
Parents See Positive Impact of Playing Computer and Video Games



Although it is the newest of all industry content rating and labeling schemes, the video game industry's system—the Entertainment Software Rating Board (ESRB)—is in many ways the most sophisticated, descriptive, and effective ratings system ever devised by any major media sector in America.”

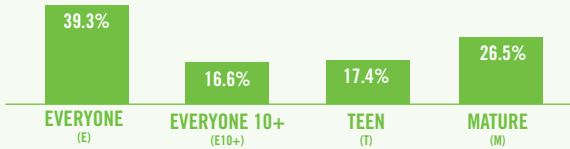
—Adam Thierer, senior research fellow at George Mason University's Mercatus Center

Best-Selling VIDEO GAME Super Genres by Units Sold, 2011



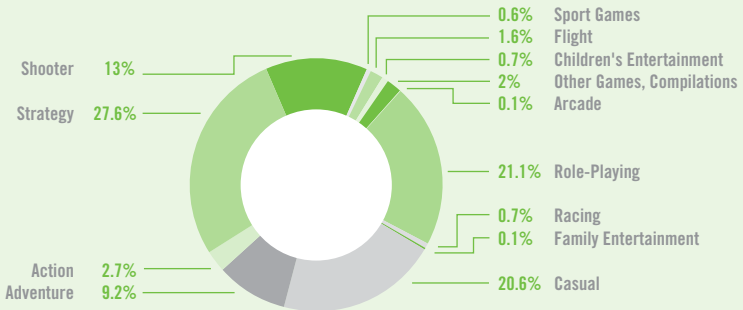
Source: The NPD Group/Retail Tracking Service

2011 Computer and Video Game Sales by Rating BY UNITS SOLD



Source: The NPD Group/Retail Tracking Service

Best-Selling COMPUTER GAME Super Genres by Units Sold, 2011



Source: The NPD Group/Retail Tracking Service

TOP 20 SELLING VIDEO GAMES OF 2011

BY UNITS SOLD

Rank	Title	ESRB Rating
1	CALL OF DUTY: MODERN WARFARE 3	Mature
2	JUST DANCE 3	Everyone 10+
3	MADDEN NFL 12	Everyone
4	ELDER SCROLLS V: SKYRIM	Mature
5	BATTLEFIELD 3	Mature
6	CALL OF DUTY: BLACK OPS	Mature
7	BATMAN: ARKHAM CITY	Teen
8	GEARS OF WAR 3	Mature
9	JUST DANCE 2	Everyone
10	ASSASSIN'S CREED: REVELATIONS	Mature
11	POKEMON WHITE VERSION	Everyone
12	ZUMBA FITNESS: JOIN THE PARTY	Everyone
13	NBA 2K12	Everyone
14	LEGO STAR WARS III: THE CLONE WARS	Everyone 10+
15	POKEMON BLACK VERSION	Everyone
16	NBA 2K11	Everyone
17	MORTAL KOMBAT 2011	Mature
18	MICHAEL JACKSON THE EXPERIENCE	Everyone 10+
19	NCAA FOOTBALL 12	Everyone
20	L.A. NOIRE	Mature

Source: The NPD Group/Retail Tracking Service

TOP 20 SELLING COMPUTER GAMES OF 2011

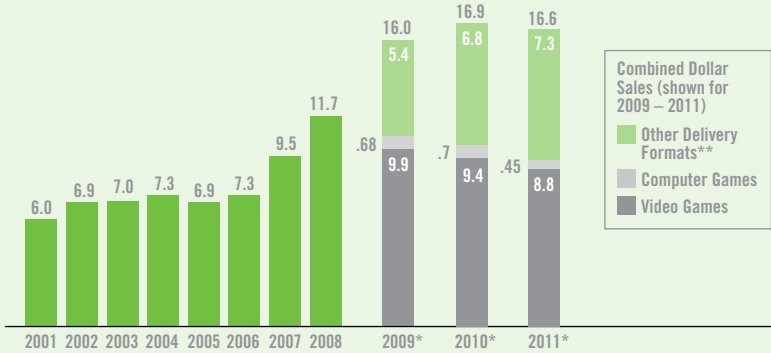
BY UNITS SOLD

RANK	TITLE	ESRB RATING
1	STAR WARS: THE OLD REPUBLIC	Teen
2	ELDER SCROLLS V: SKYRIM	Mature
3	STARCRRAFT II: WINGS OF LIBERTY	Teen
4	THE SIMS 3	Teen
5	WORLD OF WARCRRAFT: CATAclySM	Teen
6	BATTLEFIELD 3	Mature
7	THE SIMS 3: GENERATIONS	Teen
8	THE SIMS: MEDIEVAL	Teen
9	THE SIMS 3: PETS	Teen
10	PORTAL 2	Everyone 10+
11	RIFT	Teen
12	DRAGON AGE II	Mature
13	THE SIMS 3: LATE NIGHT EXPANSION PACK	Teen
14	THE SIMS 3 DELUXE	Teen
15	CIVILIZATION V	Everyone 10+
16	WORLD OF WARCRRAFT: BATTLE CHEST	Teen
17	WORLD OF WARCRRAFT: WRATH OF THE LICH KING EXPANSION PACK	Teen
18	SHOGUN 2: TOTAL WAR	Teen
19	THE SIMS 3: OUTDOOR LIVING STUFF	Teen
20	CALL OF DUTY: MODERN WARFARE 3	Mature

Source: The NPD Group/Retail Tracking Service

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

DOLLARS IN BILLIONS



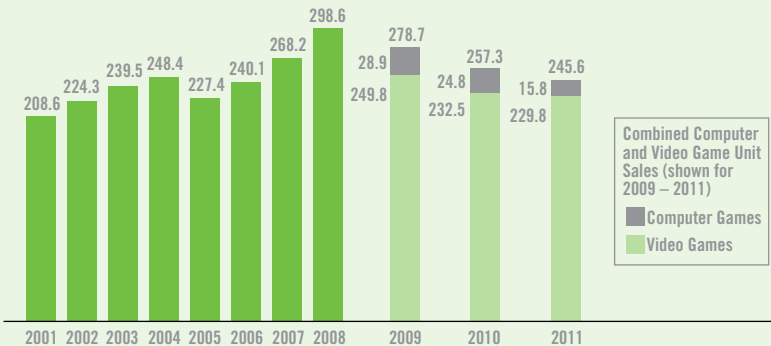
Source: The NPD Group/Retail Tracking Service; Games Market Dynamics: U.S.

* 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. 2001-2008 figures are sales of new physical content at retail exclusively.

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

UNITS IN MILLIONS*



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

* Figures are sales of new physical content at retail exclusively

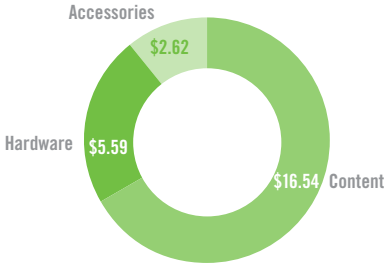
THE BOTTOM LINE



TOTAL CONSUMER SPEND ON GAMES INDUSTRY

Total Consumer Spend on Games Industry 2011

DOLLARS IN BILLIONS



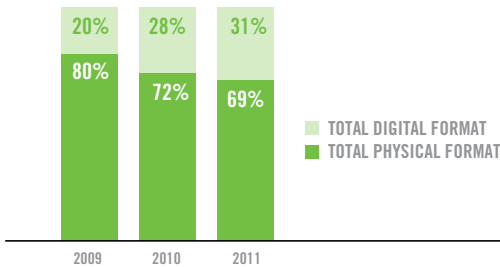
TOTAL:
\$24.75
BILLION

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

Video games sit at the confluence of history, technology, and art in such a way that's found in no other medium, a place where influences from every creative field meet, mix, and recombine."

—Daniel D. Synder, *The Atlantic*

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

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 anti-piracy 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.

ESA Members as of April 2012

38 STUDIOS	www.38studios.com
345 GAMES	www.deadliestwarriorthegame.com
505 GAMES	www.505games.com
CAPCOM USA, INC.	www.capcom.com
DEEP SILVER INC.	www.deepsilver.com
DISNEY INTERACTIVE STUDIOS, INC.	www.disney.go.com/disneyinteractivestudios/
ELECTRONIC ARTS	www.ea.com
EPIC GAMES, INC.	www.epicgames.com
HER INTERACTIVE, INC.	www.herinteractive.com
IGNITION ENTERTAINMENT, LTD.	www.utvignitiongames.com/
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.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
NIVAL	www.nival.com
NVIDIA CORPORATION	www.nvidia.com
O-GAMES, INC.	http://usa.og-international.net
PERFECT WORLD ENTERTAINMENT	www.perfectworld.com
RUBICON ORGANIZATION	http://rubiconorganization.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/
SQUARE ENIX, INC.	www.square-enix.com/na
TAKE-TWO INTERACTIVE SOFTWARE, INC.	www.take2games.com
TECMO KOEI AMERICA CORPORATION	www.tecmokoei.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

OTHER RESOURCES



ESA PARTNERS

**For more information on 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 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. 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 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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