

2018

SALES, DEMOGRAPHIC,
AND USAGE DATA

ESSENTIAL FACTS

ABOUT THE COMPUTER
AND VIDEO GAME INDUSTRY



entertainment[®]
software
association

“The spectacular growth of our industry proves video game developers, artists, and storytellers are the brightest lights in the US economy, finding more ways to delight the world’s 2.6 billion gamers each year.”

*- Michael D. Gallagher, President and CEO
Entertainment Software Association*

“I have four kids, and I’ve played video games with every one of them. It’s given me a way to bond with each of them in a unique way. Thanks to video games, I’ve learned more about each of my sons and daughters, and about myself as a father.”

*- Brian Mazique
Writer, Forbes*

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ABOUT ESA **BACK COVER**

The Entertainment Software Association (ESA) released *2018 Essential Facts About the Computer and Video Game Industry* in April 2018. Ipsos Connect conducted the annual research for ESA. The study is the most in-depth and targeted survey of its kind, gathering data from more than 4,000 American households and surveying the heads of and most frequent gamers within each household about their video game playing habits and attitudes. The *2018 Essential Facts* also includes data provided by the Entertainment Software Rating Board (ESRB), The NPD Group and AudienceNet/New Paradigm Strategy Group.

AT-A-GLANCE

64% OF US HOUSEHOLDS OWN A DEVICE THAT THEY USE TO PLAY VIDEO GAMES.

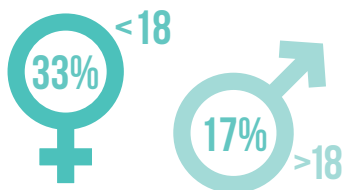


The average gamer is **34 YEARS OLD.**

Gamers age 18 or older represent more than **70 PERCENT** of the video game-playing population.

60 PERCENT of Americans play video games daily.

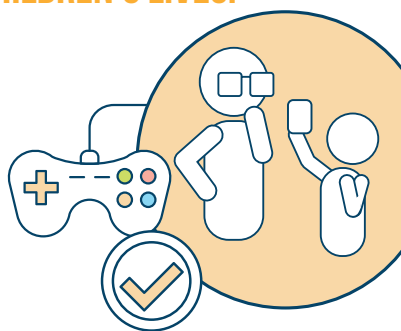
ADULT WOMEN represent a greater portion of the video game-playing population (33%) than boys under 18 (17%).



70% OF PARENTS BELIEVE VIDEO GAMES HAVE A POSITIVE INFLUENCE ON THEIR CHILDREN'S LIVES.

90% of parents are present when their child acquires a video game.

94% of parents pay attention to the video games played by their child.



THE AVERAGE AGE OF THE MOST FREQUENT GAME PURCHASER IS 36.

Of the most frequent game purchasers:

61% ARE MALE

39% ARE FEMALE

THE GAMER HOUSEHOLD

64% of US households own a device that they use to play video games.

There are an average of **2 GAMERS** in each game-playing US household.

60 PERCENT of Americans play video games daily.*



HOW MANY US HOUSEHOLDS PLAY GAMES ON THE FOLLOWING DEVICES?



41%
PERSONAL COMPUTER



36%
SMARTPHONE



36%
DEDICATED GAME CONSOLE



24%
WIRELESS DEVICE



14%
DEDICATED HANDHELD SYSTEM



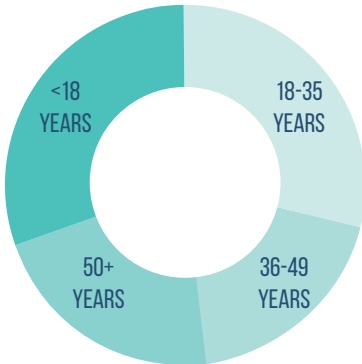
8%
VIRTUAL REALITY DEVICES

*Source: AudienceNet/New Paradigm Strategy Group

THE AVERAGE GAMER

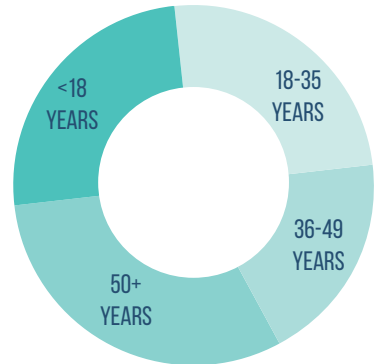
The average gamer is 34 years old.

AVERAGE GAMERS BY AGE GROUP



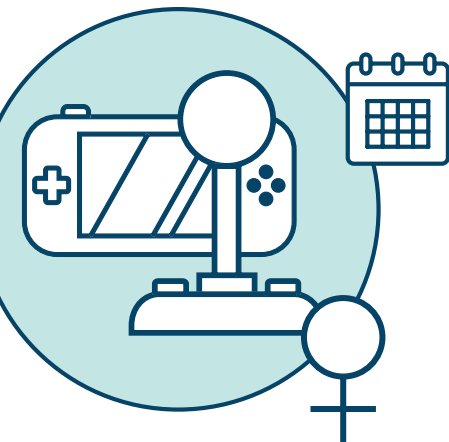
MALE

UNDER 18 YEARS OLD: 17%
18-35: 16%
36-49: 12%
AGE 50+: 11%



FEMALE

UNDER 18 YEARS OLD: 11%
18-35: 13%
36-49: 8%
AGE 50+: 12%



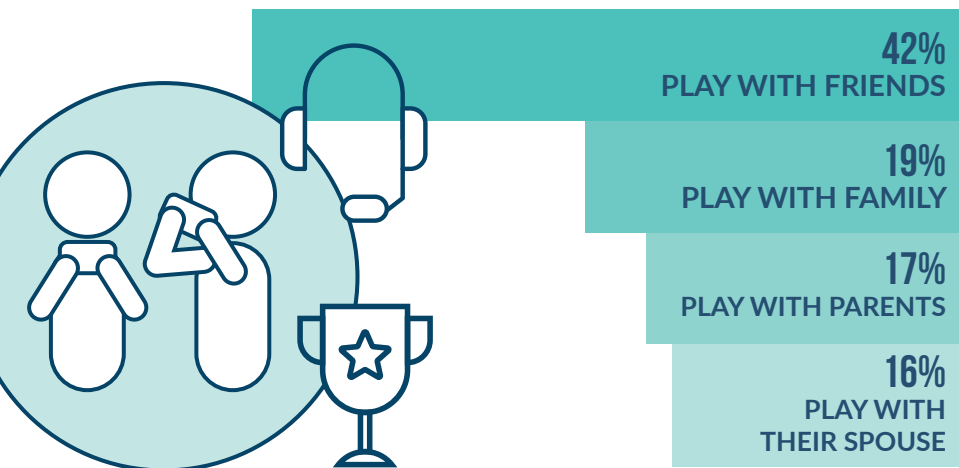
The average **female** video game player is **36**, and the average **male** video game player is **32**.

45% of US gamers are women.

AT PLAY

56% of the most frequent gamers play multiplayer games at least once a week, spending an average of 7 hours playing with others online and 6 hours playing with others in person.

WHO ARE THE MOST FREQUENT GAMERS PLAYING WITH?



55% of the most frequent gamers say that video games help connect them with their friends.

46% say it helps their family spend time together.

MOST PLAYED MULTIPLAYER GENRES:



35% SHOOTER



28% ACTION



27% CASUAL

FAMILIES AND VIDEO GAMES

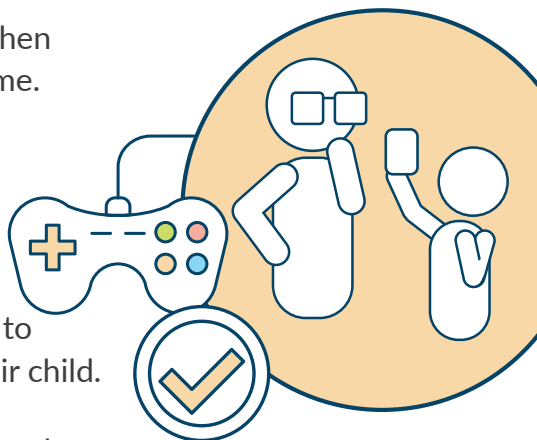
90% of parents are present when their child acquires a video game.

9 OUT OF 10 parents require their child to ask permission before buying a video game.

94% of parents pay attention to the video games played by their child.

70% of parents say video games have a positive influence on their child's life.

67% of parents play video games with their child at least once weekly.



“A book or movie can show us what it is like to be in a character's shoes, but it is the video game that can put us into those shoes.”

- Robert B. Marks, Ph.D., Whittier College

TOP REPORTED REASONS WHY PARENTS PLAY VIDEO GAMES WITH THEIR CHILDREN



1. It's fun for all of us.
2. My child asks me to.
3. It's a good opportunity to socialize with my child.
4. I enjoy playing video games as much as my child.
5. It helps me monitor what they are playing.



FAMILIES AND VIDEO GAMES

82% of parents of children who regularly play video games are familiar with the ESRB ratings.



OF THESE PARENTS...

95% ARE CONFIDENT that the ESRB ratings are accurate.

94% find the parental control settings on video game consoles useful.

72% LIMIT THEIR CHILD'S TIME PLAYING VIDEO GAMES.

OF THE 1,948 RATINGS ASSIGNED BY THE ESRB TO PHYSICAL AND DOWNLOADABLE CONSOLE GAMES IN 2017:



34%

received an E (Everyone) rating



22%

received an E10+ (Everyone 10+) rating



31%

received a T (Teen) rating

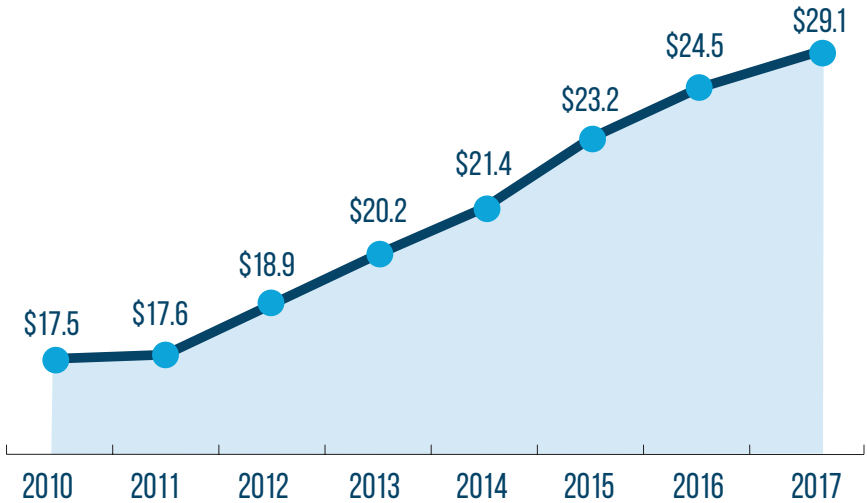


13%

received an M (Mature) rating

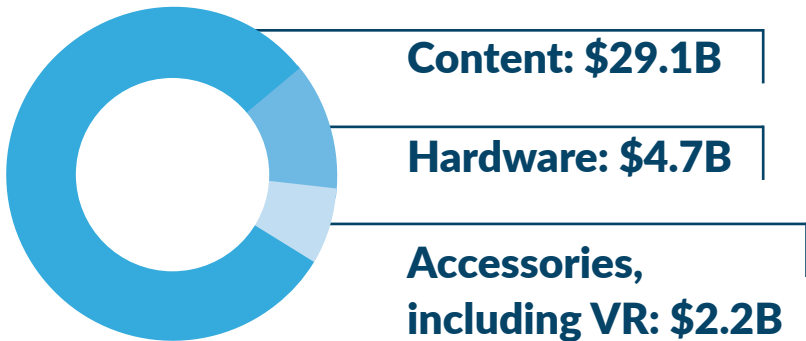
PURCHASING

ANNUAL US VIDEO GAME CONTENT SPEND, 2010 - 2017 (IN BILLIONS)



Source: The NPD Group

The **total** consumer spend on the video game industry was **\$36 BILLION IN 2017.**

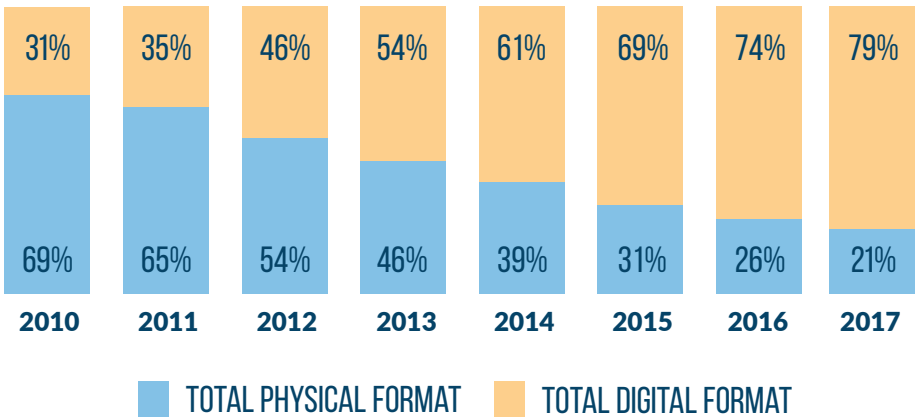


Source: The NPD Group

PURCHASING

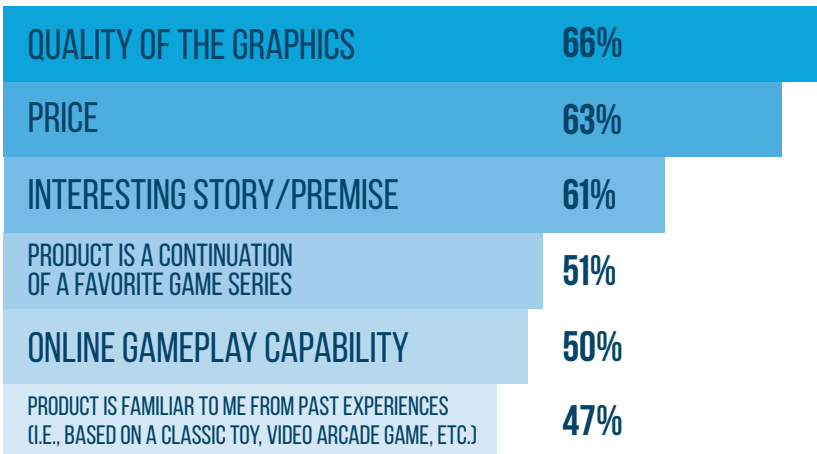
RECENT DIGITAL* AND PHYSICAL SALES INFORMATION

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



Source: The NPD Group

FACTORS INFLUENCING DECISIONS TO PURCHASE VIDEO GAMES



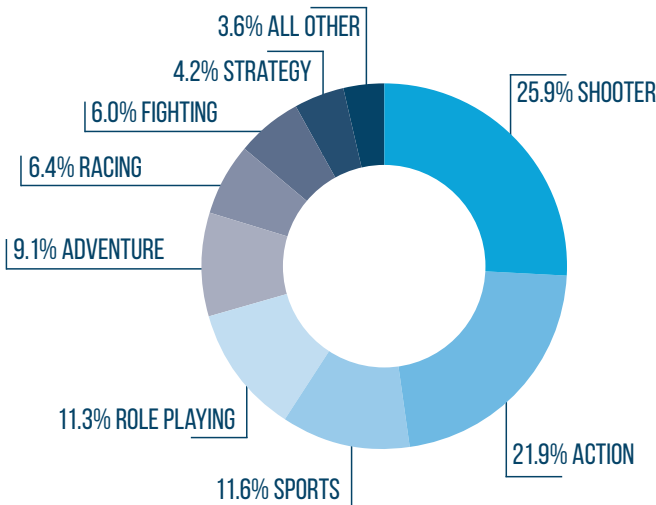
PURCHASING

TOP 20 BEST SELLING VIDEO GAMES OF 2017 BY UNITS SOLD

1	CALL OF DUTY: WWII (M)	11	TOM CLANCY'S RAINBOW SIX: SIEGE (M)
2	NBA 2K18 (E)	12	MARIO KART 8 (E)
3	GRAND THEFT AUTO V (M)	13	ASSASSIN'S CREED: ORIGINS (M)
4	MADDEN NFL 18 (E)	14	FIFA 18 (E)
5	DESTINY 2 (T)	15	ROCKET LEAGUE (E)
6	THE LEGEND OF ZELDA: BREATH OF THE WILD (E10+)	16	HORIZON ZERO DAWN (T)
7	TOM CLANCY'S GHOST RECON: WILDLANDS (M)	17	FOR HONOR (M)
8	STAR WARS: BATTLEFRONT II (T)	18	INJUSTICE 2 (T)
9	SUPER MARIO ODYSSEY (E10+)	19	NBA 2K17 (E)
10	MINECRAFT (E10+)	20	OVERWATCH (T)

Source: The NPD Group/Retail Tracking Service/Digital Games Tracking Service

BEST SELLING VIDEO GAME SUPER GENRES OF 2017 BY UNITS SOLD



Source: The NPD Group/Retail Tracking Service/Digital Games Tracking Service

PURCHASING

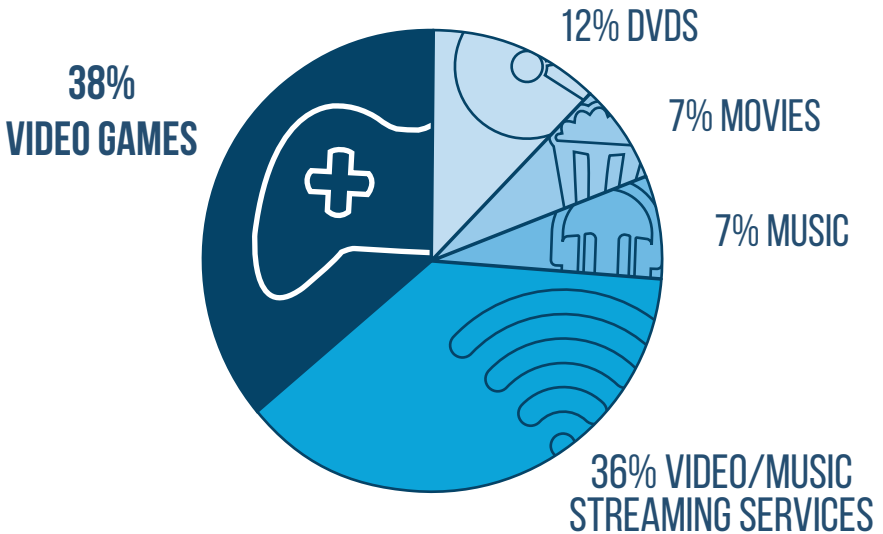
The average age of the most frequent game purchaser is **36**.

Of the most frequent game purchasers:

61% ARE MALE

39% ARE FEMALE

MOST GAMERS FEEL COMPUTER AND VIDEO GAMES PROVIDE MORE VALUE FOR THEIR MONEY



OF THE MOST FREQUENT GAMERS:

42%

Purchase new video games without having tried them

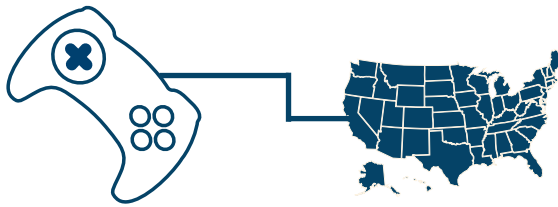
30%

Purchase new video games after downloading a trial or demo

29%

Download games from online video game storefronts

ECONOMIC IMPACT



There are **2,711** video game company locations across **84 PERCENT** of the congressional districts in America.

For a complete map of video game company locations visit WWW.AREWEINYOURSTATE.ORG.



There are now **65,678 WORKERS** directly employed at game software publisher and developer locations in the US.

Employees in the industry earned an average compensation of **\$97,000 PER YEAR.**

The US video game industry's value added to US GDP is more than **\$11.7 BILLION.**

"Prose is an art form, movies and acting in general are art forms, so is music, painting, graphics, sculpture, and so on. Some might even consider classic games like chess to be an art form. Video games use elements of all of these to create something new. Why wouldn't video games be an art form?"

- Sam Lake, Author

ESA PARTNERS

ACADEMY OF INTERACTIVE ARTS & SCIENCES | WWW.INTERACTIVE.ORG

The Academy of Interactive Arts & Sciences (AIAS) was founded in 1996 as a nonprofit 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.

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. The ESA Foundation receives its primary funding proceeds from the signature annual fundraiser Nite to Unite and other charitable initiatives.

ENTERTAINMENT SOFTWARE RATING BOARD | WWW.ESRB.ORG

The ESRB is a non-profit, self-regulatory body that assigns age and content ratings for video games and mobile apps so parents can make informed choices. It also enforces advertising guidelines adopted by the video game industry and helps companies implement responsible online and mobile privacy practices under its Privacy Certified program.

INTERNATIONAL GAME DEVELOPERS ASSOCIATION | WWW.IGDA.ORG

The IGDA supports and empowers game developers around the world in achieving fulfilling and sustainable careers through connecting worldwide game developers at all stages of their careers to peers with shared interests and goals, advocating on issues that are important to the professional and personal success of game developers, and providing educational resources for students, game developers, and game development studios that help solve game development's most difficult challenges.

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

NPD is the leading global provider of market information and business solutions covering brick-and-mortar, e-commerce, and emerging channels in more than 20 industries. We combine our unique data assets with analytic solutions to help our clients measure performance, predict trends, and improve results, advising them to help drive successful growth. Practice areas include apparel, appliances, automotive, beauty, books, consumer electronics, e-commerce, entertainment, fashion accessories, food consumption, foodservice, footwear, home, juvenile products, mobile, office supplies, retail, sports, technology, toys, travel retail, games, and watches/jewelry.



ESA MEMBERS

as of April 2018

505 GAMES

ACTIVISION BLIZZARD, INC.

BANDAI NAMCO ENTERTAINMENT, INC.

BETHESDA SOFTWORKS, LLC

CAPCOM CO., LTD.

DEEP SILVER

DISNEY INTERACTIVE STUDIOS, INC.

ELECTRONIC ARTS, INC.

EPIC GAMES, INC.

FOCUS HOME INTERACTIVE

GEARBOX PUBLISHING, LLC

GUNGHO ONLINE ENTERTAINMENT
AMERICA, INC.

KALYPSO MEDIA GROUP

KONAMI DIGITAL ENTERTAINMENT, INC.

LEGENDS OF LEARNING

MAGIC LEAP, INC.

MICROSOFT CORPORATION

NEXON AMERICA, INC.

NCSOFT

NINTENDO OF AMERICA

NVIDIA CORPORATION

OUTRIGHT GAMES

PHOSPHOR STUDIOS

SIX FOOT

SONY INTERACTIVE ENTERTAINMENT, INC.

SQUARE ENIX, LTD.

TAKE-TWO INTERACTIVE SOFTWARE, INC.

TENCENT

TRISEUM

UBISOFT, INC.

VANTIV ENTERTAINMENT SOLUTIONS

WARNER BROS. INTERACTIVE
ENTERTAINMENT, INC.

XSEED GAMES

The Entertainment Software Association (ESA) conducts business and consumer research and 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: @theESA or @ESAGovAffairs.



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@ESA_Foundation | @ESRBRatings

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