2013

SALES, DEMOGRAPHIC AND USAGE DATA

ESSENTIAL FACTS

ABOUT THE COMPUTER AND VIDEO GAME INDUSTRY

entertainment® software association

“No other sector has experienced the same explosive growth as the computer and video game industry. Our creative publishers and talented workforce continue to accelerate advancement and pioneer new products that push boundaries and unlock entertainment experiences. These innovations in turn drive enhanced player connectivity, fuel demand for products, and encourage the progression of an expanding and diversified consumer base.”

—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 2013 Essential Facts About the Computer and Video Game Industry was released by the Entertainment Software Association (ESA) at E3 2013. 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

58%

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

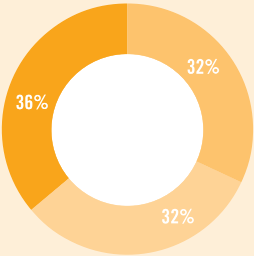
dedicated game console, PC or smartphone

51%

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

The average age of game players is:

30

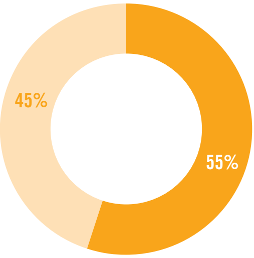


AGE
of Game Players

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

WHO IS PLAYING

GAMER DEMOGRAPHICS



GENDER
of Game Players

55% male
45% female

Women 18 or older represent a significantly greater portion of the game-playing population (31%) than boys age 17 or younger (19%)

WHO BUYS COMPUTER AND VIDEO GAMES?

The average age of the most frequent game purchaser:

35

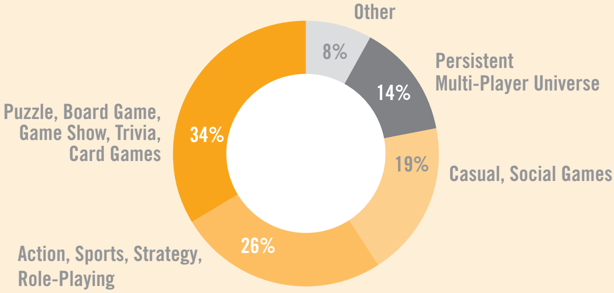
Of the most frequent game purchasers, 54% are male and 46% are female

43%

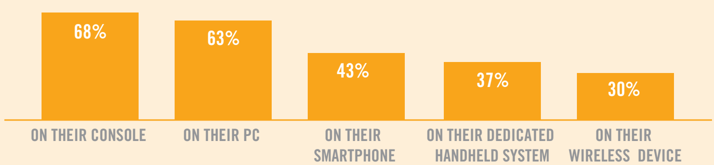
of game players believe that computer and video games give them the most value for their money, compared with DVDs, music or going out to the movies

Some of the top reasons why 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

TYPES OF ONLINE GAMES PLAYED MOST OFTEN:

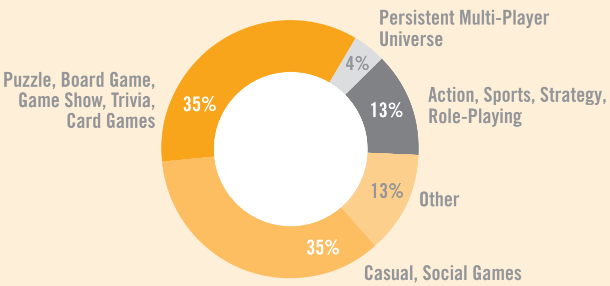


U.S. households that own a dedicated game console, PC, smartphone, dedicated handheld system or wireless device play games:



Gamers play on-the-go: **36%** play games on their smartphone, and **25%** play games on their wireless device

TYPES OF MOBILE GAMES PLAYED MOST OFTEN:



AT PLAY

HOW WE PLAY

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

58% playing board games

49% watching TV

47% going to the movies

44% watching movies at home

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

42% use their console to watch movies

22% use their console to listen to music

19% use their console to watch TV shows

5% use their console to watch live content

62%

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

77%

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

32%

of gamers play social games

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

16% play with parents

32% play with other family members

42% play with friends

16% play with their spouse or significant other

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

Adult gamers have been playing for an average of 15 years; males average 17 years of game play, females average 13 years

88%

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?

86%

of parents believe that the parental controls available on 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

78% of parents place time limits on Internet usage

72% of parents place time limits on television viewing

69% of parents place time limits on movie viewing

89%

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

80%

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

93%

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

AT PLAY

PARENTS AND GAMES

35%
of parents play computer and video games with their children at least weekly

58%
of parents play with their children at least monthly

TOP 5 REASONS PARENTS PLAY WITH THEIR KIDS:

1. It's fun for the entire family: 85%
2. Because they're asked to: 82%
3. It's a good opportunity to socialize with their child: 78%
4. It's a good opportunity to monitor game content: 57%
5. They enjoy playing video games as much as their child does: 49%

52%
of parents say video games are a positive part of their child's life

Parents with Children Under 18 See Positive Impact of Playing Computer and Video Games:

Of the games rated by ESRB in 2012:

45% received an E (Everyone) rating

22% received an E10+ (Everyone 10+) rating

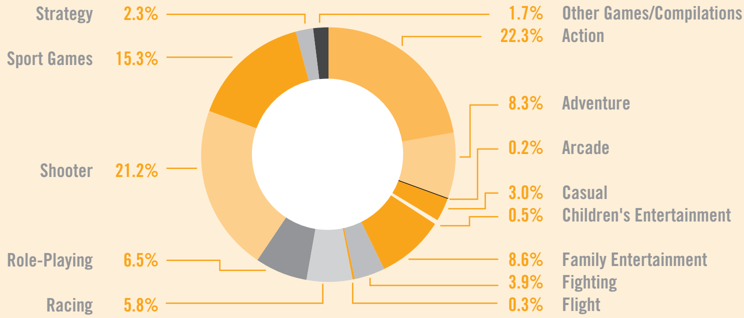
24% received a T (Teen) rating

9% received an M (Mature) rating

THE BOTTOM LINE

TOP SELLERS

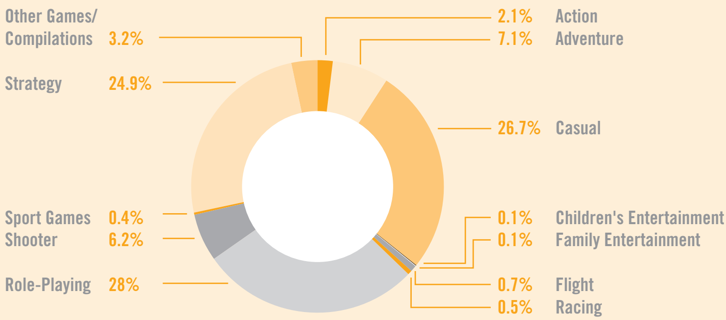
Best-Selling VIDEO GAME Super Genres by Units Sold, 2012



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, 2012



Source: The NPD Group/Retail Tracking Service

TOP 20 SELLING VIDEO GAMES OF 2012

BY UNITS SOLD

RANK	TITLE
1	CALL OF DUTY: BLACK OPS II
2	MADDEN NFL 13
3	HALO 4
4	ASSASSIN'S CREED III
5	JUST DANCE 4
6	NBA 2K13
7	CALL OF DUTY: MODERN WARFARE 3
8	BORDERLANDS 2
9	LEGO BATMAN 2: DC SUPER HEROES
10	FIFA SOCCER 13
11	JUST DANCE 3
12	SKYLANDERS GIANTS
13	MASS EFFECT 3
14	NBA 2K12
15	NCAA FOOTBALL 13
16	NEW SUPER MARIO BROS. 2
17	BATTLEFIELD 3
18	ELDER SCROLLS V: SKYRIM
19	BATMAN: ARKHAM CITY
20	MARIO KART 7

Source: The NPD Group/Retail Tracking Service

TOP 20 SELLING COMPUTER GAMES OF 2012

BY UNITS SOLD

RANK	TITLE
1	DIABLO III
2	GUILD WARS 2
3	WORLD OF WARCRAFT: MISTS OF PANDARIA EXPANSION PACK
4	THE SIMS 3
5	STAR WARS: THE OLD REPUBLIC
6	THE SIMS 3: SUPERNATURAL EXPANSION PACK
7	ELDER SCROLLS V: SKYRIM
8	THE SIMS 3 SEASONS EXPANSION PACK
9	WORLD OF WARCRAFT: BATTLE CHEST
10	STARCRAFT II: WINGS OF LIBERTY
11	AMAZING HIDDEN OBJECT GAMES 3 PACK
12	THE SIMS 3: PETS
13	MASS EFFECT 3
14	THE SIMS 3: SHOWTIME EXPANSION PACK
15	DIABLO BATTLE CHEST
16	BATTLEFIELD 3
17	THE SIMS 3: MASTER SUITE STUFF
18	THE SIMS 3: LATE NIGHT EXPANSION PACK
19	CIVILIZATION V
20	THE SIMS 3: GENERATIONS

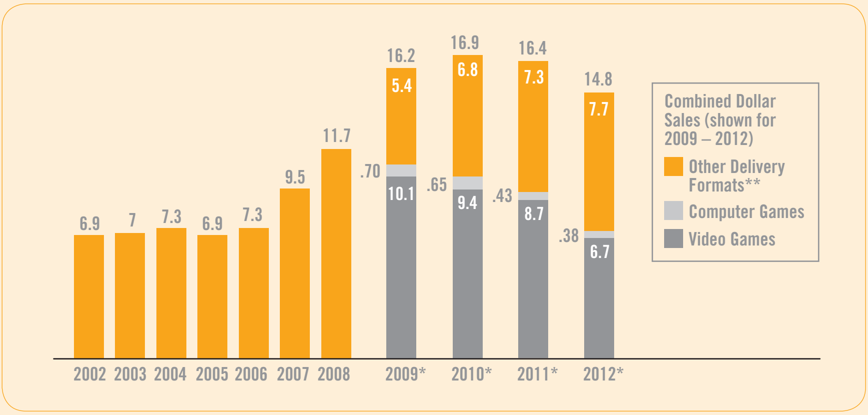
Source: The NPD Group/Retail Tracking Service

THE BOTTOM LINE

SALES INFORMATION

U.S. Computer and Video Game DOLLAR Sales Growth

DOLLARS IN BILLIONS*



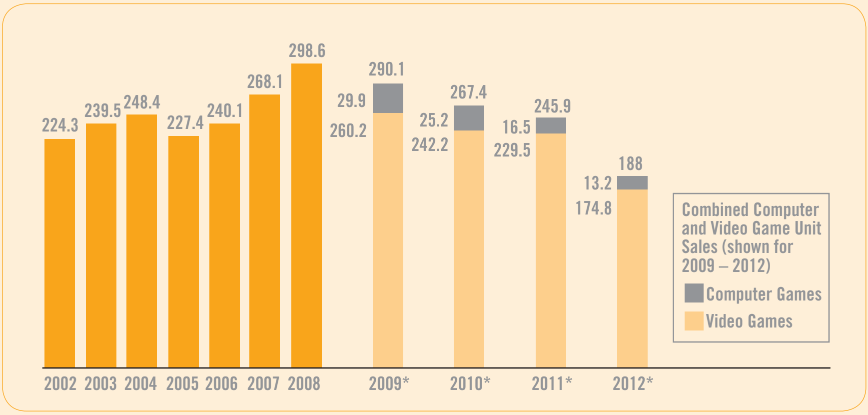
Source: The NPD Group/Retail Tracking Service; Games Market Dynamics: U.S.

* *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. 2002-2008 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.

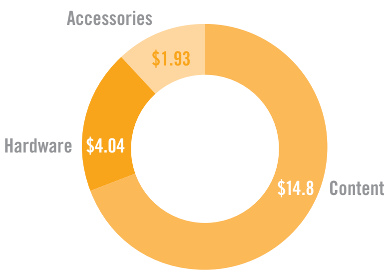
* *Figures are sales of new physical content at retail exclusively*

THE BOTTOM LINE

TOTAL CONSUMER SPEND ON GAMES INDUSTRY

Total Consumer Spend on Games Industry 2012

DOLLARS IN BILLIONS

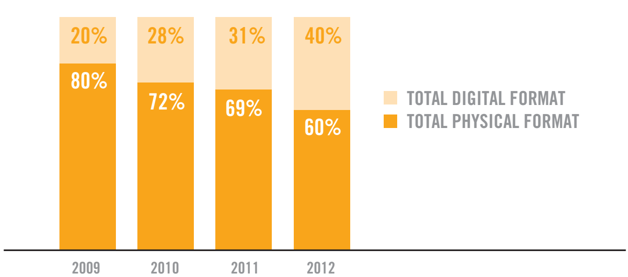


TOTAL:
$20.77
BILLION

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

> **"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*

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 May 2013

345 GAMES	www.deadliestwarriorthegame.com
505 GAMES	www.505games.com
CAPCOM USA, INC.	www.capcom.com
DEEP SILVER INC.	www.deepsilver.com
DENA	www.dena.jp/intl/
DISNEY INTERACTIVE STUDIOS, INC.	www.disney.go.com/disneyinteractivestudios/
ELECTRONIC ARTS	www.ea.com
EPIC GAMES, INC.	www.epicgames.com
GLOOPS INTERNATIONAL, INC.	www.gloops.com/en
GREE INTERNATIONAL, INC.	www.gree-corp.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
NETDRAGON WEBSOFT INC.	http://ir.netdragon.com/
NEXON AMERICA INC.	www.nexon.net
NINTENDO OF AMERICA INC.	www.nintendo.com
NVIDIA CORPORATION	www.nvidia.com
PERFECT WORLD ENTERTAINMENT	www.perfectworld.com
RUBICON ORGANIZATION	www.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.tecmokoeiamerica.com
TRION WORLDS, INC.	www.trionworlds.com
UBISOFT ENTERTAINMENT, INC.	www.ubisoftgroup.com
WARGAMING	www.wargaming.com
WARNER BROS. INTERACTIVE ENTERTAINMENT INC.	www.wbie.com
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 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 its 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 500,000 grassroots activists have joined the VGVN.

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www.theESA.com