2016

SALES, DEMOGRAPHIC AND USAGE DATA

ESSENTIAL FACTS

ABOUT THE COMPUTER AND VIDEO GAME INDUSTRY

esa

entertainment® **software** association

"Video games are the future. From education and business, to art and entertainment, our industry brings together the most innovative and creative minds to create the most engaging, immersive and breathtaking experiences we've ever seen. The brilliant developers, designers and creators behind our games have and will continue to push the envelope, driving unprecedented leaps in technology impacting everyday life for years to come."

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

WHAT'S INSIDE

WHO IS PLAYING

AT PLAY

THE BOTTOM LINE

WHO WE ARE

63%

of U.S. households are home to at least one person who plays video games regularly (3 hours or more per week)

There are an average of

1.7 gamers

in each game-playing U.S. household

65%

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

"Games as a form of media will undoubtedly have taken on a range of new meanings in ten years, but play will always be the engine that drives their engagement. I think we'll see playful systems underlying new designs in human centered activities like healthcare, communications, and of course, learning."

—*Katie Salen, Chief Design and Research Officer, Institute of Play*

48%

of U.S. households own a dedicated game console

The average game player age is **35** years old
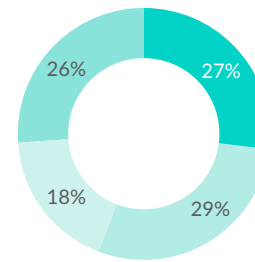
AGE
of Game Players

27% under 18 years
29% 18-35 years
18% 36-49 years
26% 50+ years
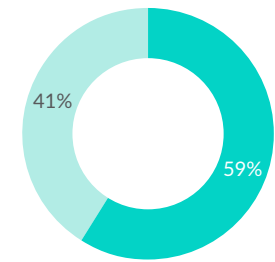
GENDER
of Game Players

59% male
41% female

The most frequent **FEMALE GAME PLAYER** is on average **44 years old** and the average **MALE GAME PLAYER** is **35 years old**

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

THERE IS AN EQUAL DISTRIBUTION OF
FEMALE VIDEO GAMERS IN AGE:

50%	50%
35 and Under	Older Than 35

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

The average age of the most frequent game purchaser is **38**

FEMALE PURCHASERS **40%**

60% MALE PURCHASERS

Of the most frequent game purchasers:

52% of the most frequent gamers feel that video games provide more value for their money than

DVDs
23%

Music
14%

Going to the movies
10%

Of the most frequent game purchasers, most:

41%

31%

30%

PURCHASE NEW VIDEO GAMES WITHOUT HAVING TRIED THEM

DOWNLOAD THE FULL GAME OFF THE COMPANY'S WEBSITE

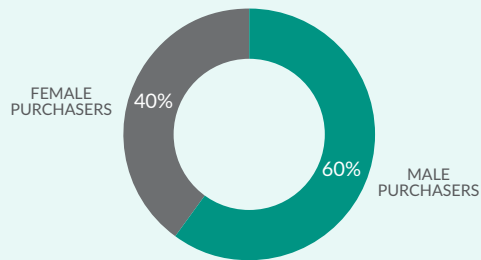PURCHASE AFTER DOWNLOADING THE TRIAL VERSION OR DEMO
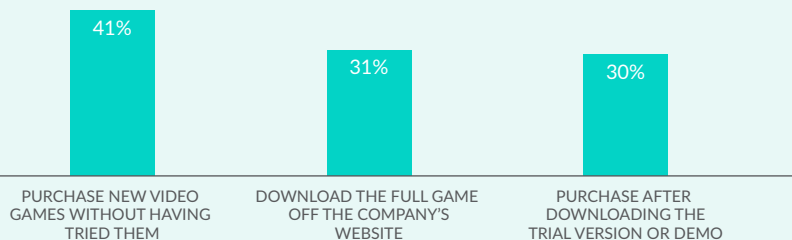
95% of the most frequent game purchasers who own dedicated game consoles purchase video games for them

48%
of the most frequent gamers play social games

Top devices most frequent gamers use:
PC (**56%**), dedicated game console (**53%**), smartphone (**36%**), wireless device (**31%**), dedicated handheld system (**17%**)

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

38%
Puzzle/board game/card game/game shows

6%
Action

6%
Strategy

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

49%
Playing board games

37%
Watching TV

37%
Going to the movies
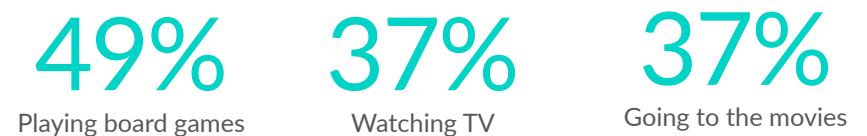
Gamers who own dedicated game consoles use them for other entertainment media, in addition to playing games:

50%
Watch movies

34%
Watch TV shows

28%
Listen to music

21%
Live and other content

HOW WE PLAY
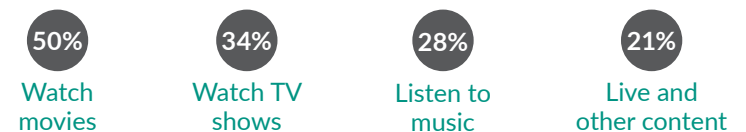
eSPORTS AND VIRTUAL REALITY

54%
of the most frequent gamers play with others, including:

40%
Friends

21%
Family members

17%
Parent(s)

15%
Spouse/partner

The most frequent gamers who play multiplayer and online games spend an average of

6.5 Hours
per week playing with others **online**

4.6 Hours
per week playing with others **in-person**

51% of the most frequent gamers play a multiplayer mode at least weekly

53% of the most frequent game players feel video games help them connect with friends and **42%** feel video games help them spend time with family

OF THE MOST FREQUENT GAMERS **75%** BELIEVE PLAYING VIDEO GAMES PROVIDES MENTAL STIMULATION OR EDUCATION

36% of the most frequent gamers play on their smartphones

50%
of the most frequent gamers are familiar with eSports

Most popular ways to follow eSports:

Social media posts	Video clips	Cable TV	Stream coverage
45%	43%	40%	38%
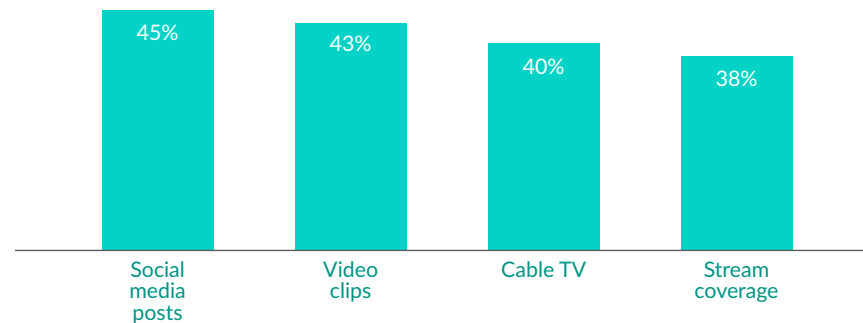
55%
of the most frequent gamers are familiar with virtual reality; among those,

40%
say they will likely purchase VR within the next year

58%
of the most frequent gamers who are familiar with VR intend to play video games on VR

86% of parents are aware of the ESRB rating system

97% of parents believe the ESRB rating system is accurate

Source: Hart Research Associates, ESRB ratings awareness and use survey, 2012 (commissioned by ESRB)

PARENTS CONTROL WHAT THEIR KIDS PLAY

93%

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 limits on video game playing

74% of parents place time limits on Internet usage

73% of parents place time limits on TV viewing

65% of parents place time limits on movie viewing

OF THE GAMES RATED BY ESRB IN 2015:

EVERYONE E ESRB

EVERYONE 10+ E 10+ ESRB

TEEN T ESRB

MATURE 17+ M ESRB
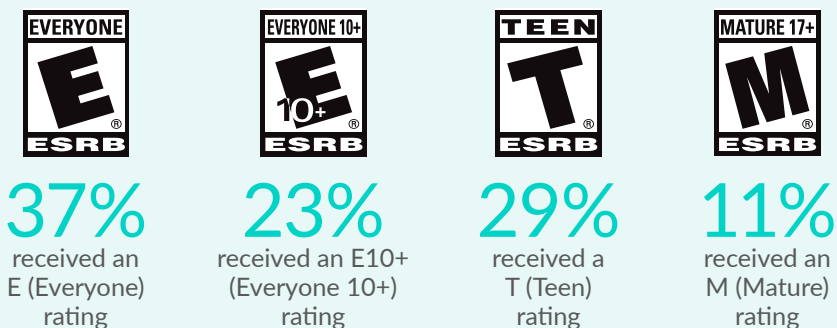
37% received an E (Everyone) rating

23% received an E10+ (Everyone 10+) rating

29% received a T (Teen) rating

11% received an M (Mature) rating

"These tools have become so powerful that a few pediatricians are now rethinking the American Academy of Pediatrics screen time guidelines. Why? Because so many parents are having positive, nurturing, bonding experiences with their kids and their iPads."

—*Greg Toppo, reporter, USA Today*

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

9 out of 10

require their children to ask permission or are present when their child buys or rents a video game

95% always or sometimes pays attention to video games played by their child

68% of parents say video games are a positive part of their child's life

62% 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: 88%
2. Because they're asked to: 76%
3. It's a good opportunity to socialize with their child: 76%
4. It's a good opportunity to monitor game content: 59%
5. They enjoy playing video games as much as their child does: 57%

Best-Selling VIDEO GAME Super Genres by Units Sold, 2015

- Strategy 3.8%
- Sport games 13.2%
- Shooter 24.5%
- Role-playing 11.6%
- Racing 4.1%
- 0.8% Other games/compilations
- 22.9% Action
- 7.7% Adventure
- 0.9% Casual
- 3.6% Family entertainment
- 6.7% Fighting
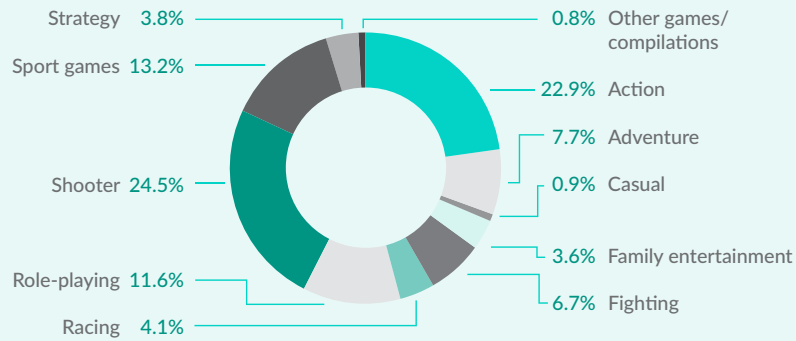
Source: The NPD Group/Retail Tracking Service

> "We will see games everywhere around us. I'm not explicitly talking about 'gamification' or thin applications that strip games of their depth. We will see deep and immersive experiences that will transform learning in and outside of school, workforce training, medical treatment, social interactions, how people practice and rehearse real-world skills, and of course, entertainment."
>
> *—Asi Burak, president, Games for Change*

Best-Selling COMPUTER GAME Super Genres by Units Sold, 2015
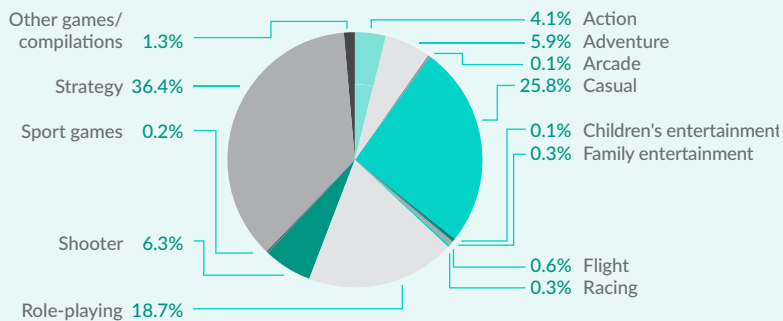
- Other games/compilations 1.3%
- Strategy 36.4%
- Sport games 0.2%
- Shooter 6.3%
- Role-playing 18.7%
- 4.1% Action
- 5.9% Adventure
- 0.1% Arcade
- 25.8% Casual
- 0.1% Children's entertainment
- 0.3% Family entertainment
- 0.6% Flight
- 0.3% Racing

Source: The NPD Group/Retail Tracking Service

Top 20 Selling VIDEO GAMES of 2015
BY UNITS SOLD

	RATING
1	CALL OF DUTY: BLACK OPS III (M)
2	MADDEN NFL 16 (E)
3	FALLOUT 4 (M)
4	STAR WARS BATTLEFRONT 2015 (T)
5	NBA 2K16 (E)
6	GRAND THEFT AUTO V (M)
7	MINECRAFT (E 10+)
8	MORTAL KOMBAT X (M)
9	FIFA 16 (E)
10	CALL OF DUTY: ADVANCED WARFARE (M)
11	BATMAN: ARKHAM KNIGHT (M)
12	LEGO: JURASSIC WORLD (E)
13	BATTLEFIELD HARDLINE (M)
14	HALO 5: GUARDIANS (T)
15	SUPER SMASH BROS. (E)
16	THE WITCHER 3: WILD HUNT (M)
17	DYING LIGHT (M)
18	DESTINY: THE TAKEN KING (T)
19	NBA 2K15 (E)
20	METAL GEAR SOLID V: THE PHANTOM PAIN (M)

Source: The NPD Group/Retail Tracking Service

Top 20 Selling COMPUTER Games of 2015
BY UNITS SOLD

	RATING
1	THE SIMS 4 (T)
2	FALLOUT 4 (M)
3	THE SIMS 3: STARTER PACK (T)
4	THE SIMS 4 GET TO WORK EXPANSION PACK (T)
5	STARCRAFT II: LEGACY OF THE VOID (T)
6	ELDER SCROLLS V: SKYRIM (M)
7	FALLOUT ANTHOLOGY (M)
8	GRAND THEFT AUTO V (M)
9	WORLD OF WARCRAFT: WARLORDS OF DRAENOR EXPANSION PACK (T)
10	STAR WARS BATTLEFRONT 2015 (T)
11	THE SIMS 3: PETS (T)
12	THE SIMS 3 SEASONS EXPANSION PACK (T)
13	DIABLO III: REAPER OF SOULS (M)
14	DIABLO III (M)
15	THE SIMS 3: ISLAND PARADISE EXPANSION PACK (T)
16	THE SIMS 3: UNIVERSITY LIFE EXPANSION PACK (T)
17	THE SIMS 3: SUPERNATURAL EXPANSION PACK (T)
18	STARCRAFT II: WINGS OF LIBERTY (T)
19	SIM CITY 2013 (E 10+)
20	WORLD OF WARCRAFT: BATTLE CHEST 2013 (T)

Source: The NPD Group/Retail Tracking Service

U.S. Computer and Video Game DOLLAR Sales
DOLLARS IN BILLIONS

Combined Dollar Sales
(shown for 2010 – 2015)
- Other Delivery Formats**
- Computer Games
- Video Games

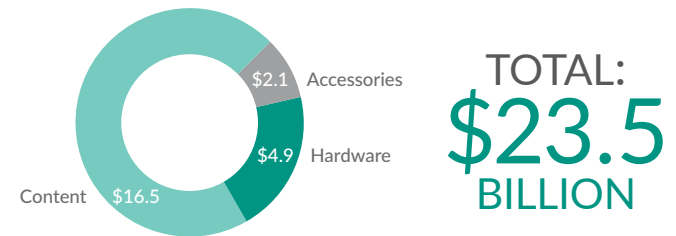| Year	Total	Other Delivery Formats**	Computer Games	Video Games
2006	7.3			
2007	9.5			
2008	11.7			
2009*	10.1			
2010*	17.1	7	.65	9.4
2011*	16.7	7.5	.43	8.7
2012*	15.2	8.1	.38	6.7
2013*	15.4	9	.22	6.1
2014*	15.4	9.9	.17	5.3
2015*	16.5	11.2	.11	5.2

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.
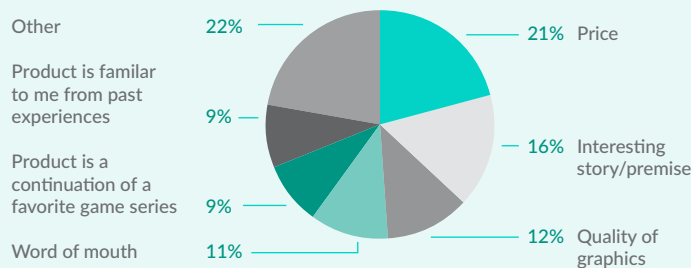
Factors Influencing Decisions to Purchase Video Games:

- Other — 22%
- Product is familar to me from past experiences — 9%
- Product is a continuation of a favorite game series — 9%
- Word of mouth — 11%
- 21% Price
- 16% Interesting story/premise
- 12% Quality of graphics

Total Consumer Spend on Games Industry 2015
DOLLARS IN BILLIONS

- Accessories $2.1
- Hardware $4.9
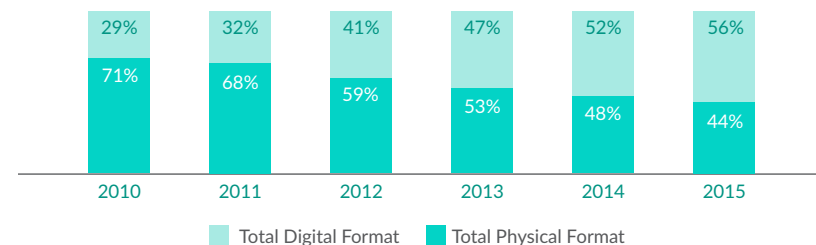- Content $16.5

TOTAL: $23.5 BILLION

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

> "Games are super flexible in the creation of personal learning pathways and we will soon see their adaptability in play much more widely in schools and among employers. I can imagine, too, that educators and health professionals will turn to games to tune-up and practice their skills much more frequently, from surgeons to pilots to teachers."
>
> —Michael Levine, founding director of the Joan Ganz Cooney Center at Sesame Workshop

Recent Digital* and Physical Sales Information

	2010	2011	2012	2013	2014	2015
Total Digital Format	29%	32%	41%	47%	52%	56%
Total Physical Format	71%	68%	59%	53%	48%	44%

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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entertainment®
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ABOUT THE ENTERTAINMENT SOFTWARE ASSOCIATION

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: @RichatESA or @ESAGovAffairs.

ESA MEMBERS AS OF APRIL 2015

345 GAMES	www.spike.com/press/shows/345-games
505 GAMES	www.505games.com
ACTIVISION BLIZZARD, INC.	www.activisionblizzard.com
BANDAI NAMCO ENTERTAINMENT INC.	www.bandainamcoent.com
BETHESDA SOFTWORKS, LLC	www.bethsoft.com
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
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	www.konami.com
LEVEL-5 INC.	www.level5ia.com
MAGIC LEAP STUDIOS	www.magicleap.com/#/home
MICROSOFT CORPORATION	www.xbox.com
NATSUME INC.	www.natsume.com
NEXON AMERICA, INC.	www.nexon.net
NINTENDO OF AMERICA INC.	www.nintendo.com
NORDIC GAMES GMBH	www.nordicgames.at
NVIDIA	www.nvidia.com
POP UP GAMING	www.popupgaming.com
SNAIL GAMES	www.snail.com/en/
SONY INTERACTIVE ENTERTAINMENT	www.us.playstation.com
SQUARE ENIX LTD.	www.na.square-enix.com/us/home
TAKE-TWO INTERACTIVE SOFTWARE, INC.	www.take2games.com
TENCENT	www.tencent.com/en-us/
TRIPWIRE INTERACTIVE	www.tripwireinteractive.com
UBISOFT, INC.	www.ubisoftgroup.com
VANTIV ENTERTAINMENT SOLUTIONS	vantiventertainment.com
VIRTUIX	www.virtuix.com/
WARGAMING	www.wargaming.com
WARNER BROS. INTERACTIVE ENTERTAINMENT INC.	www.warnerbros.com/videogames
XSEED GAMES	www.xseedgames.com

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

The NPD Group provides market information and business solutions that drive better decision-making and better results. The world's leading brands rely on us to help them get the right products in the right places for the right people. Practice areas include automotive, beauty, consumer electronics, entertainment, fashion, food / foodservice, home, luxury, mobile, office supplies, sports, technology, toys and video games.

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.esafoundation.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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