

2010

SALES, DEMOGRAPHIC AND USAGE DATA

ESSENTIAL FACTS

ABOUT THE COMPUTER
AND VIDEO GAME
INDUSTRY



entertainment
software
association



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ALL DATA IN THIS DOCUMENT IS FROM THE ESA'S 2010 CONSUMER SURVEY UNLESS OTHERWISE NOTED. The Entertainment Software Association (ESA) released its 2010 Essential Facts About the Computer and Video Game Industry at the 2010 E3 Expo. 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 IS PLAYING



GAMER DEMOGRAPHICS

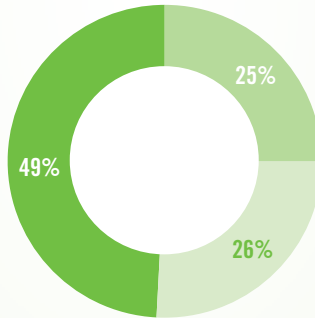
WHO PLAYS COMPUTER AND VIDEO GAMES?

67%

of American households
play computer or video games.

The average game player age is:

34



AGE of Game Players

25% under 18 years
49% 18-49 years
26% 50+ years

In 2010,

26%

of gamers were over the age of 50.

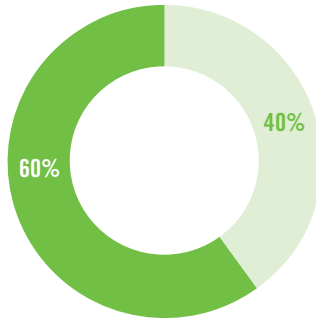
WHO IS PLAYING



GAMER DEMOGRAPHICS

“There are games now for pretty much every age, every demographic. More and more women are going online. It comes down to everybody is playing games. Games are just evolving like species in order to fit into every little niche of our lives.”

— Jesse Schell, instructor of entertainment technology at Carnegie Mellon University



GENDER of Game Players

60% male
40% female

WOMEN age 18 or older represent a significantly greater portion of the game-playing population (33%) than boys age 17 or younger (20%).

WHO BUYS COMPUTER AND VIDEO GAMES?

The average age of the most frequent game purchaser is:

40

Of game purchasers, 54% are male and 46% are female.

WHO IS PLAYING



GAMER DEMOGRAPHICS

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.

64%

of gamers play games with other gamers in person. This is an increase from 62% in 2009 and from 59% in 2008.

67%

of homes in America own either a console and/or PC used to run entertainment software.

Nothing has captured the mind space of both students and kids and adults as games have. They are deeply immersive.”

— Kumar Garg, policy analyst for the Office of Science and Technology Policy for the White House

WHO IS PLAYING



PARENTS AND GAMES

PARENTS* AND GAMES



93%

of the time parents are present at the time games are purchased or rented.

64%

of parents believe games are a positive part of their children's lives.

“Video gaming as a family has the potential to bring generations together, provide experience of digital technologies to all ages, and develop social skills such as turn-taking — all in activity described as ‘fun’.”

— Mary Ulicsak, Martha Wright and Sue Cranmer, Futurelab

86%

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

48%

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

Parents report always or sometimes monitoring the games their children play 97% of the time.

**Parents with kids under 18 who also own a game console and/or computer used to play games.*



DO PARENTS CONTROL WHAT THEIR KIDS PLAY?

76%

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:

83% of parents place time limits on video game playing

78% of parents place time limits on television viewing

75% of parents place time limits on Internet usage

66% of parents place time limits on movie viewing

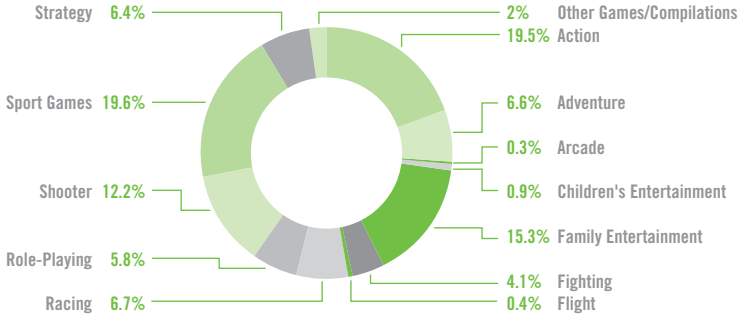
PARENTS PLAY GAMES

THE TOP **4** REASONS PARENTS PLAY VIDEO GAMES WITH THEIR CHILDREN:

- 1** It's fun for the entire family: 87%
- 2** Because they're asked to: 83%
- 3** It's a good opportunity to socialize with the child: 75%
- 4** It's a good opportunity to monitor game content: 60%

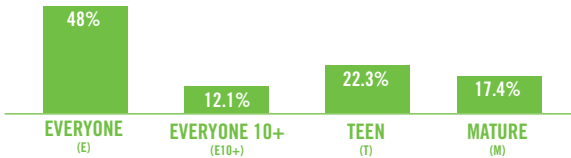


Best-Selling VIDEO GAME Super Genres by Units Sold, 2009



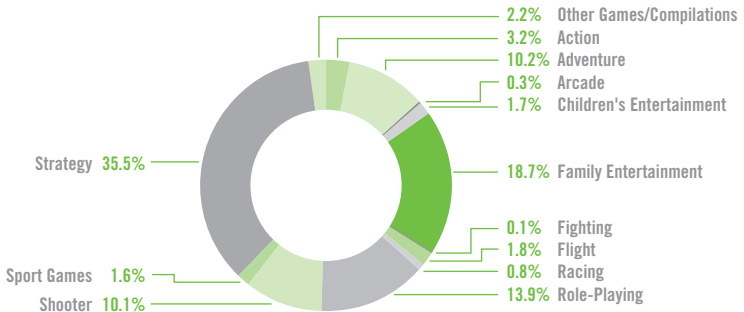
Source: The NPD Group/Retail Tracking Service

2009 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, 2009



Source: The NPD Group/Retail Tracking Service

TOP 20 SELLING VIDEO GAMES OF 2009

BY UNITS SOLD

Rank	Title	Platform	ESRB Rating
1	CALL OF DUTY: MODERN WARFARE 2	360	Mature
2	NEW SUPER MARIO BROS. WII	WII	Everyone
3	WII SPORTS RESORT W/ WII MOTION PLUS	WII	Everyone
4	WII FIT W/ BALANCE BOARD	WII	Everyone
5	MARIO KART W/ WHEEL	WII	Everyone
6	WII PLAY W/ REMOTE	WII	Everyone
7	CALL OF DUTY: MODERN WARFARE 2	PS3	Mature
8	WII FIT PLUS W/BALANCE BOARD	WII	Everyone
9	HALO 3: ODST	360	Mature
10	POKEMON PLATINUM VERSION	NDS	Everyone
11	MADDEN NFL 10	360	Everyone
12	NEW SUPER MARIO BROS	NDS	Everyone
13	MARIO KART DS	NDS	Everyone
14	ASSASSIN'S CREED II	360	Mature
15	MADDEN NFL 10	PS3	Everyone
16	LEFT 4 DEAD 2	360	Mature
17	MARIO & LUIGI: BOWSER'S INSIDE STORY	NDS	Everyone
18	UFC 2009 UNDISPUTED	360	Teen
19	EA SPORTS ACTIVE BUNDLE	WII	Everyone
20	RESIDENT EVIL 5	360	Mature

Source: The NPD Group/Retail Tracking Service

TOP 20 SELLING COMPUTER GAMES OF 2009

BY UNITS SOLD

RANK	TITLE	ESRB RATING
1	THE SIMS	Teen
2	WORLD OF WARCRAFT: WRATH OF THE LICH KING EXPANSION PACK	Teen
3	THE SIMS 2 DOUBLE DELUXE	Teen
4	WORLD OF WARCRAFT: BATTLE CHEST	Teen
5	CALL OF DUTY: MODERN WARFARE 2	Mature
6	WORLD OF WARCRAFT	Teen
7	THE SIMS 3: WORLD ADVENTURES EXPANSION PACK	Teen
8	SPORE	Everyone 10+
9	DRAGON AGE: ORIGINS	Mature
10	EMPIRE: TOTAL WAR	Teen
11	THE SIMS 3 COLLECTOR'S ED	Teen
12	WORLD OF WARCRAFT: BURNING CRUSADE EXPANSION PACK	Teen
13	AION	Teen
14	THE SIMS 2 APARTMENT LIFE EXPANSION PACK	Teen
15	STARCRRAFT: BATTLE CHEST	Mature
16	WARHAMMER 40,000: DAWN OF WAR II	Mature
17	LEFT 4 DEAD 2	Mature
18	MUMBO JUMBO ASSORTMENT	Everyone
19	DIABLO BATTLE CHEST	Mature
20	WARCRAFT III BATTLE CHEST	Teen

Source: The NPD Group/Retail Tracking Service



WHO PLAYS GAMES ONLINE?

58%

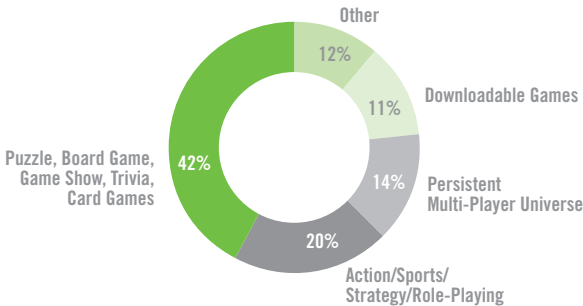
of online game players are male.

42%

of online game players are female.

17% of most frequent gamers pay to play online games.

WHAT IS THE ONE TYPE OF ONLINE GAME PLAYED MOST OFTEN?



HOW MANY AMERICANS PLAY ON WIRELESS DEVICES?

42%

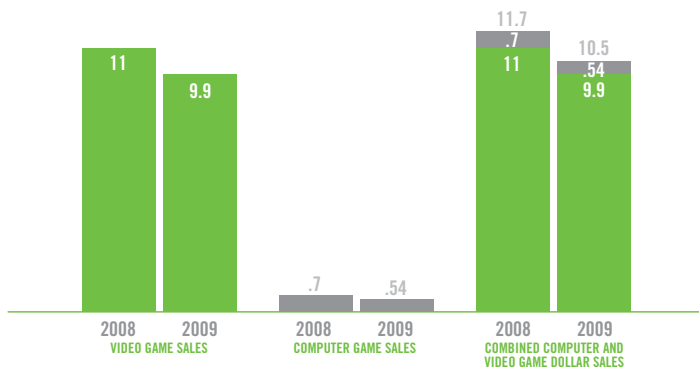
of heads of households report they play games on wireless devices such as a cell phone or PDA, up from 20% in 2002.

WHAT'S THE BOTTOM LINE?



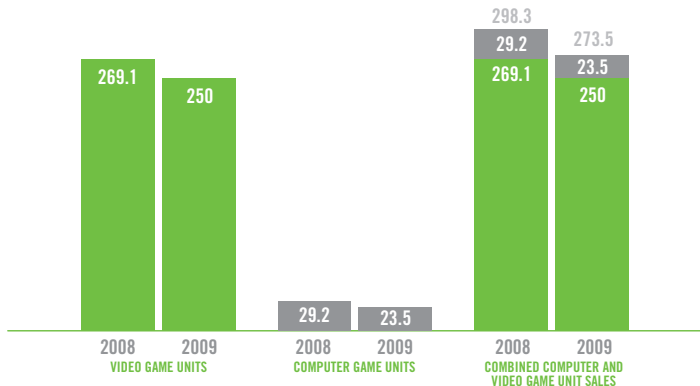
RECENT SALES INFORMATION

U.S. Computer and Video Game **DOLLAR** Sales: 2008 and 2009 DOLLARS IN BILLIONS



Source: The NPD Group/Retail Tracking Service

U.S. Computer and Video Game **UNIT** Sales: 2008 and 2009 UNITS IN MILLIONS



Source: The NPD Group/Retail Tracking Service

WHAT'S THE BOTTOM LINE?



HISTORICAL SALES INFORMATION

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

DOLLARS IN BILLIONS



Source: The NPD Group/Retail Tracking Service

“As technology — and as these incredible artists that work on video games — continue to push the envelope the entire video game sector will explode. It’s not going to go away. If anything, it will take over.”

— Shia LeBeouf, Actor

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

UNITS IN MILLIONS



Source: The NPD Group/Retail Tracking Service

How Many Americans Expect to Buy Games?

41%

of Americans have purchased or plan to purchase one or more games in 2010.

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, 2010

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.eidosinteractive.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
KOEI CORPORATION	www.koei.com
KONAMI DIGITAL ENTERTAINMENT AMERICA	www.konami.com
MICROSOFT CORPORATION	www.microsoft.com
MTV GAMES	www.mtv.com/games/video_games
NAMCO BANDAI GAMES AMERICA INC.	www.namco.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.	www.og-international.net
PLAYLOGIC ENTERTAINMENT, INC.	www.playlogicgames.com
REALTIME WORLDS	www.realtimeworlds.com
SEGA OF AMERICA, INC.	www.sega.com
SEVEN45 STUDIOS	www.seven45studios.com
SLANG	www.slang.vg
SONY COMPUTER ENTERTAINMENT AMERICA	www.us.playstation.com
SONY ONLINE ENTERTAINMENT, INC.	www.station.sony.com/en/
SOUTHPEAK INTERACTIVE CORPORATION	www.southpeakgames.com
SQUARE ENIX, INC.	www.square-enix.com
TAKE-TWO INTERACTIVE SOFTWARE, INC.	www.take2games.com
THQ, INC.	www.thq.com
TRION WORLD NETWORK, INC.	www.trionworld.com
UBISOFT ENTERTAINMENT, INC.	www.ubi.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 Entertainment Software Rating Board (ESRB) is a nonprofit, self-regulatory body established in 1994 by the ESA. The ESRB independently assigns computer and video game content ratings, enforces industry-adopted advertising guidelines and helps ensure responsible online privacy practices for the interactive entertainment software industry. The organization's mission is to empower consumers, especially parents, with the ability to make informed decisions about the computer and video games they choose for their families through the assignment of age and content ratings, and to hold the computer and video game industry accountable for responsible marketing practices.

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

The Academy of Interactive Arts & Sciences® (AIAS) was founded in 1996 as a not-for-profit organization dedicated to the advancement and recognition of the interactive arts. The Academy's mission is to promote and advance common interests in the worldwide interactive entertainment community; recognize outstanding achievements in the interactive arts and sciences; and conduct an annual awards show (Interactive Achievement Awards) to enhance awareness of the interactive art form. The Academy also strives to provide a voice for individuals in the interactive entertainment community. In 2002 the Academy created the D.I.C.E. (Design, Innovate, Communicate, Entertain) Summit, 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. The Academy has over 10,000 members, with the board comprised of senior executives from the major videogame companies including Pandemic Studios, Electronic Arts, Microsoft, Nintendo, Sony and Capcom Entertainment.

INTERNATIONAL GAME DEVELOPERS ASSOCIATION (IGDA) | WWW.IGDA.ORG

The International Game Developers Association is the largest non-profit membership organization serving individuals that create video games. The IGDA is committed to advancing the careers and enhancing the lives of game developers by connecting members with their peers, promoting professional development, and advocating on issues that affect the developer community.

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

The NPD Group is the leading global provider of reliable and comprehensive consumer and retail market research 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.

VIDEO GAME VOTERS NETWORK | WWW.VIDEOGAMEVOTERS.ORG

The Video Game Voters Network, 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 200,000 grassroots activists have joined the VGVN.



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