

2009

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 2009 CONSUMER SURVEY UNLESS OTHERWISE NOTED. The Entertainment Software Association (ESA) released its 2009 Essential Facts About the Computer and Video Game Industry at the 2009 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

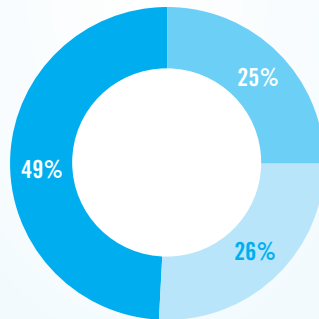
WHO PLAYS COMPUTER AND VIDEO GAMES?

68%

of American households
play computer or video games.

The average game player age is:

35



AGE

of Game Players

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

In 2009,

25%

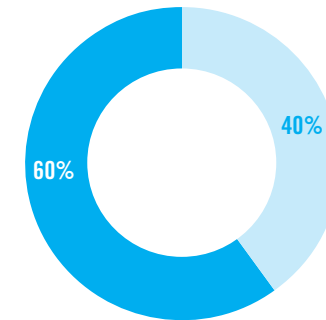
of gamers were over the age of 50.

WHO IS PLAYING

GAMER DEMOGRAPHICS

“A new study found that more than half of adults play video games, about one-fifth play daily or almost every day.”

— Daniel Sieberg, CBS Evening News



GENDER

of Game Players

60% male
40% female

WOMEN age 18 or older represent a significantly greater portion of the game-playing population (34%) than boys age 17 or younger (18%).

WHO BUYS COMPUTER AND VIDEO GAMES?

The average age of the most frequent game purchaser is:

39

Of game purchasers, 52% are male and 48% 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, adult males average 12 years of game playing, females average 10 years.

62%

of gamers play games with other gamers in person. This is an increase from 59% in 2008 and from 56% in 2007.

42%

of homes in America have a video game console.

... more and more, winning a video game can mean solving a logic puzzle, answering trivia questions, running and jumping in place, or singing on key.”

— Sharon Male, PARADE Magazine

WHO IS PLAYING

PARENTS AND GAMES

PARENTS* AND GAMES

92%

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

63%

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

Video gaming is pervasive in the lives of American teens—young teens and older teens, girls and boys, and teens from across the socioeconomic spectrum. Opportunities for gaming are everywhere, and teens are playing video games frequently.”

— Teens, Video Games, and Civics, a report of the Pew Internet and American Life Project

83%

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

Parents report always or sometimes monitoring the games their children play 94% of the time.

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

WHO IS PLAYING

PARENTS AND GAMES

DO PARENTS CONTROL WHAT THEIR KIDS PLAY?

77%

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 time limits on video game playing

72% of parents place time limits on Internet usage

71% of parents place time limits on television viewing

63% of parents place time limits on movie viewing

“If you feel that the opportunities to connect with your kids are few and far between, the solution might be to break out a video game. (Seriously!)”

— Scott Alexander, Family Circle

PARENTS PLAY GAMES

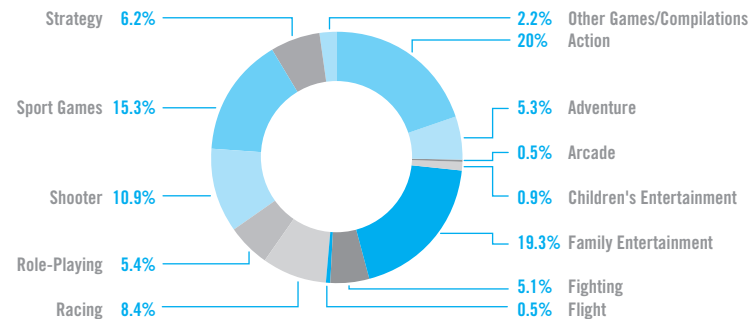
THE TOP 4 REASONS PARENTS PLAY VIDEO GAMES WITH THEIR CHILDREN:

- 1 It's Fun For The Entire Family 82%
- 2 Because They're Asked To 81%
- 3 It's A Good Opportunity To Socialize With The Child 78%
- 4 It's A Good Opportunity To Monitor Game Content 63%

AT PLAY

TOP SELLERS

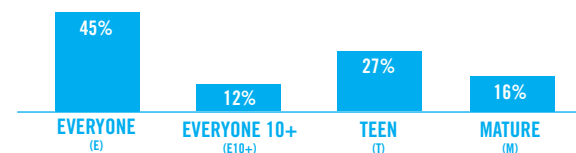
Best-Selling VIDEO GAME Super Genres by Units Sold, 2008



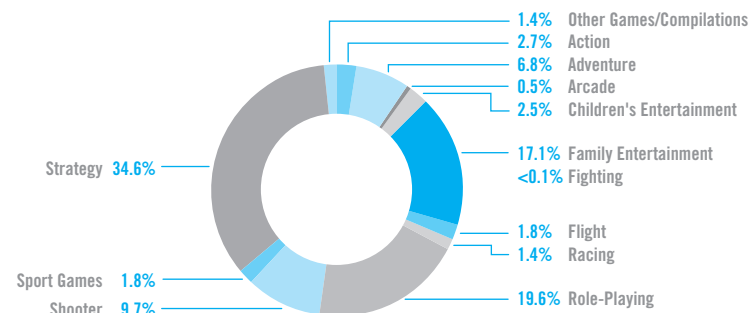
Source: The NPD Group / Point-of-Sale Information

2008 Computer and Video Game Sales by Rating

BY UNITS SOLD



Best-Selling COMPUTER GAME Super Genres by Units Sold, 2008



Source: The NPD Group / Point-of-Sale Information

TOP 20 SELLING VIDEO GAMES OF 2008

BY UNITS SOLD

RANK	TITLE	PLATFORM	ESRB RATING
1	WII PLAY W/ REMOTE	WII	Everyone
2	MARIO KART	WII	Everyone
3	WII FIT	WII	Everyone
4	SUPER SMASH BROS: BRAWL	WII	Teen
5	GRAND THEFT AUTO IV*	360	Mature
6	CALL OF DUTY: WORLD AT WAR*	360	Mature
7	GEARS OF WAR 2*	360	Mature
8	GRAND THEFT AUTO IV*	PS3	Mature
9	MADDEN NFL 09*	360	Everyone
10	MARIO KART	NDS	Everyone
11	CALL OF DUTY 4: MODERN WARFARE*	360	Mature
12	NEW SUPER MARIO BROS	NDS	Everyone
13	GUITAR HERO III LEGENDS OF ROCK*	WII	Teen
14	GUITAR HERO WORLD TOUR*	WII	Teen
15	LINK'S CROSSBOW TRAINING	WII	Teen
16	MARIO PARTY	NDS	Everyone
17	GUITAR HERO ON TOUR*	NDS	Everyone 10+
18	FABLE II*	360	Mature
19	MARIO AND SONIC: OLYMPIC GAMES	NDS	Everyone
20	MADDEN NFL 09*	PS3	Everyone

*Includes Collector's, Limited, Gold Editions

Source: The NPD Group / Point-of-Sale Information

TOP 20 SELLING COMPUTER GAMES OF 2008

BY UNITS SOLD

RANK	TITLE	ESRB RATING
1	WORLD OF WARRAFT: WRATH OF THE LICH KING*	Teen
2	SPORE	Everyone 10+
3	WORLD OF WARRAFT: BATTLE CHEST	Teen
4	THE SIMS 2 DOUBLE DELUXE	Teen
5	WORLD OF WARRAFT*	Teen
6	WARHAMMER ONLINE: AGE OF RECKONING*	Teen
7	AGE OF CONAN: HYBORIAN ADVENTURES*	Mature
8	THE SIMS 2 FREETIME EXPANSION PACK*	Teen
9	WORLD OF WARRAFT: BURNING CRUSADE*	Teen
10	THE SIMS 2 APARTMENT LIFE*	Teen
11	CALL OF DUTY 4: MODERN WARFARE*	Mature
12	FALLOUT 3*	Mature
13	CIVILIZATION IV*	Everyone 10+
14	SPORE CREATURE CREATOR	Everyone
15	CALL OF DUTY: WORLD AT WAR*	Mature
16	SINS OF A SOLAR EMPIRE*	Teen
17	SIM CITY 4	Everyone
18	WARCRAFT III BATTLE CHEST	Teen
19	THE SIMS 2 KITCHEN & BATH INTERIOR DESIGN STUFF	Teen
20	CRYSIS*	Mature

*Includes Collector's, Limited, Gold Editions

Source: The NPD Group / Point-of-Sale Information

WHO PLAYS GAMES ONLINE?

57%

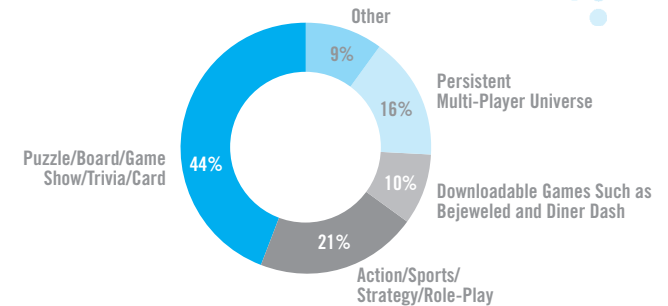
of online game players are male.

43%

of online game players are female.

23% of most frequent gamers pay to play online games. This is an increase from 22% in 2008 and a marked increase from 8% in 2004.

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



HOW MANY AMERICANS PLAY GAMES ON WIRELESS DEVICES?

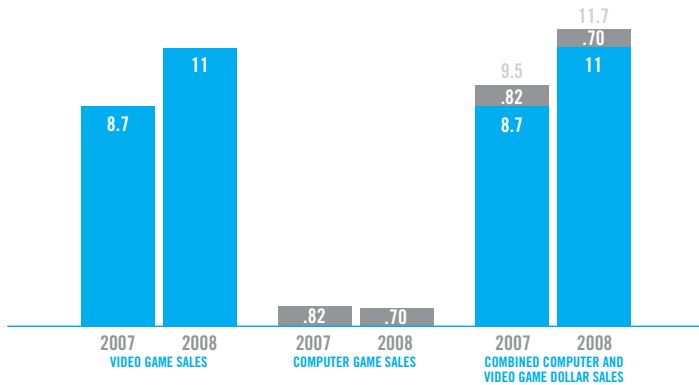
37%

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?

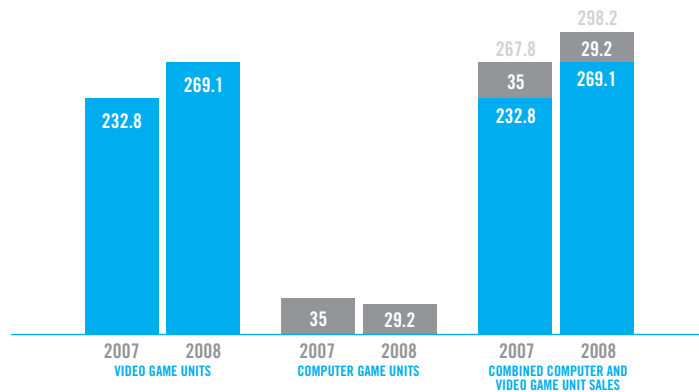
RECENT SALES INFORMATION

U.S. Computer and Video Game **DOLLAR** Sales: 2007 and 2008
DOLLARS IN BILLIONS



Source: The NPD Group, Inc/Retail Tracking Service

U.S. Computer and Video Game **UNIT** Sales: 2007 and 2008
UNITS IN MILLIONS

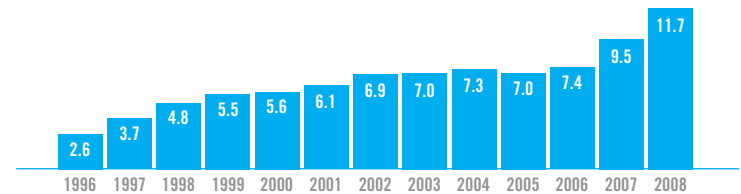


Source: The NPD Group, Inc/Retail Tracking Service

WHAT'S THE BOTTOM LINE?

HISTORICAL SALES INFORMATION

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

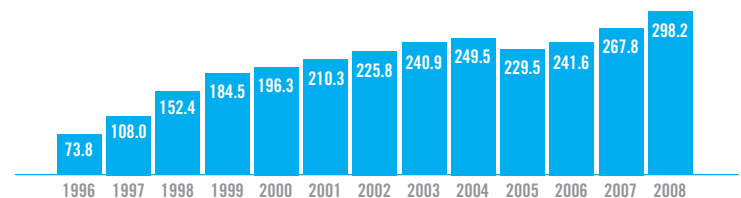


Source: The NPD Group, Inc/Retail Tracking Service

The video game sector is no longer an interesting little industry—
it's serious money.”

— Jack Kyser, chief economist at the Los Angeles County Economic
Development Corporation

U.S. Computer and Video Game **UNIT** Sales Growth
UNITS IN MILLIONS



Source: The NPD Group, Inc/Retail Tracking Service

How Many Americans Expect to Buy Games?

43%

of Americans have purchased or plan
to purchase one or more games in 2009.

WHO WE ARE

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, 2009

505 GAMES	www.505games.com
ATARI, INC.	www.atari.com
CAPCOM USA, INC.	www.capcom.com
CRAVE ENTERTAINMENT	www.cravegames.com
DISNEY INTERACTIVE STUDIOS, INC.	www.disney.go.com/disneyinteractivestudios/
EIDOS INTERACTIVE	www.eidosinteractive.com
ELECTRONIC ARTS	www.ea.com
HER INTERACTIVE, INC.	www.herinteractive.com
KOEI CORPORATION	www.koei.com
KONAMI DIGITAL ENTERTAINMENT	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
NINTENDO OF AMERICA INC.	www.nintendo.com
PLAYLOGIC ENTERTAINMENT, INC.	www.playlogicgames.com
SEGA OF AMERICA, INC.	www.sega.com
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	www.ubi.com
WARNER BROS. INTERACTIVE ENTERTAINMENT INC.	www.wbie.com
XSEED GAMES	www.xseedgames.com

OTHER RESOURCES

ESA PARTNERS

For more information on the 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 the Entertainment Software Association (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 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 Bioware/Pandemic, Electronic Arts, Microsoft, Nintendo, Sony and Ubisoft.

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 provider of reliable and comprehensive consumer and retail information for a wide range of industries. Today, more than 1,600 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.

VIDEO GAME VOTERS NETWORK | WWW.VIDEOGAMEVOTERS.ORG

The Video Game Voters Network, a project of the Entertainment Software Association, is a means by which American adults who play computer and video games can organize and take action on important policy issues affecting the computer and video game industry.



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