

2019 ESSENTIAL FACTS

About the Computer and Video Game Industry



entertainment[®]
software
association

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The Entertainment Software Association (ESA) released *2019 Essential Facts About the Computer and Video Game Industry* in May, 2019. Ipsos conducted the annual research for the ESA. The study is the most in-depth and targeted survey of its kind, gathering data from more than 4,000 Americans about their video game playing habits and attitudes. The *2019 Essential Facts* also includes data provided by the Entertainment Software Rating Board (ESRB) and The NPD Group.



FOREWORD

2018 was a record-breaking year for our industry, with total video game sales exceeding \$43.4 billion. Over 164 million adults in the United States play video games, and three-quarters of all Americans have at least one gamer in their household. It's now more important than ever to understand who America's video game players really are and what's driving them.

That's why I'm thrilled to share the *2019 Essential Facts About the Computer and Video Game Industry*. For the first time, we at the Entertainment Software Association have taken a comprehensive look at the individual Americans who enjoy video games and their lifestyles in order to better understand their profiles and interests.

The resulting data speaks for itself. Video game players represent a diverse cross-section of the American population spanning every age, gender, and ethnicity. They live healthy lives, are civically engaged, and are socially active. More than three-quarters report that video games provide them with mental stimulation (79%) as well as relaxation and stress relief (78%). The role of video games in the American family is also changing: nearly three-quarters (74%) of parents believe video games can be educational for their children, and more than half (57%) enjoy playing games with their child at least weekly.

The *2019 Essential Facts* simply illustrates what we in the industry already know to be true: we are living in the golden age of video games, and video game players are thriving.

– Stan Pierre-Louis, Acting CEO & President, Entertainment Software Association




65%
of American adults
play video games

The average age
of a gamer is
33 years
old

AT-A-GLANCE



90%
of parents **pay attention** to
the games their child plays



59%
of gamers are certain
they will vote in the next
presidential election



75% of Americans have at least
one gamer in their household

Gamers are more likely to
have a creative hobby
(drawing, singing, writing, etc.)



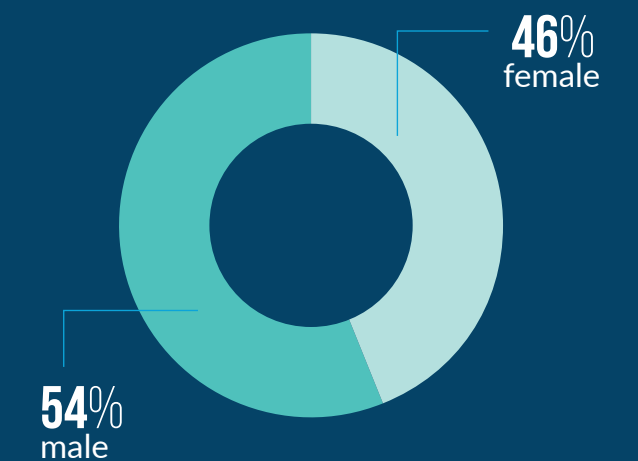
56%
49%

play a musical instrument




32%
27%

Gamers are



■ Gamers ■ Average Americans


AVERAGE GAMER

 **65%** of American adults **play video games**

The most common devices used for video game play among adult gamers

 **60%**
Smartphone

 **52%**
Personal computer

 **49%**
Dedicated game console

Most popular game genres

 **71%**
Casual


 **53%**
Action

 **47%**
Shooter

 **52%**
of gamers are college educated

Gamers feel that video game play has a positive impact on their lives

 **79%**
of gamers say games provide mental stimulation

 **78%**
of gamers say games provide relaxation and stress relief



46%
of gamers are **female**

Average age for women

34



54%
of gamers are **male**

Average age for men

32

- Overall average age of gamers is **33**
- They have been playing for **14 years** on average



When it comes to adult gamers

 **63%** play with others

Adult gamers spend

4.8  **3.5**
hours a week played with others online hours a week played with others in person


SOCIAL & LIFESTYLE

GAMERS AS COMPARED TO AVERAGE AMERICANS

Gamers play throughout the day

 **52%** after work

 **31%** while waiting for appointments

 **27%** during break at work/school

 **16%** during a commute

Gamers get the same amount of sleep at night

 **6.8** hrs
7 hrs

Gamers are just as likely to

Take camping/hiking trips

 **2.7** trips per year
2.5 trips per year


Vacation internationally

 **.8** trips per year
.7 trips per year

Exercise

 **4.1** hrs/wk
3.9 hrs/wk

Gamers are civically engaged

 **59%** are certain they will vote in the next presidential election

POLITICAL AFFILIATIONS

37% Democrat
33% Republican
18% Independents
12% Other

Gamers are more likely to

have a creative hobby (drawing, singing, writing, etc.)

 **56%**
49%

play a musical instrument

 **32%**
27%

meditate regularly

 **32%**
27%

be vegetarian

 **17%**
13%

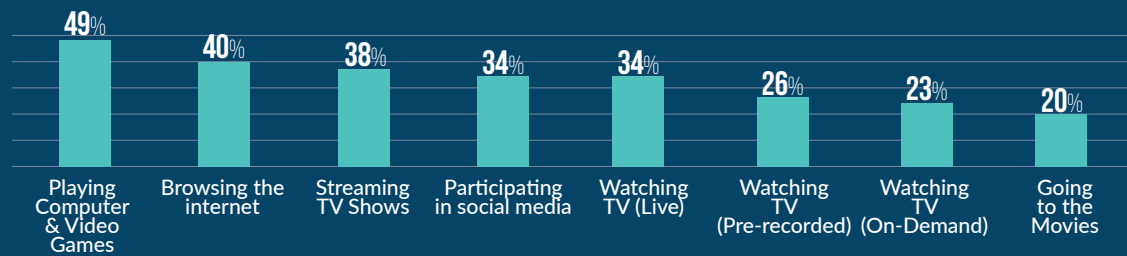
■ Gamers ■ Average Americans

PARENTS OF GAMERS

 **87%** of parents are aware of ESRB ratings >  **98%** of them are confident that ratings are accurate

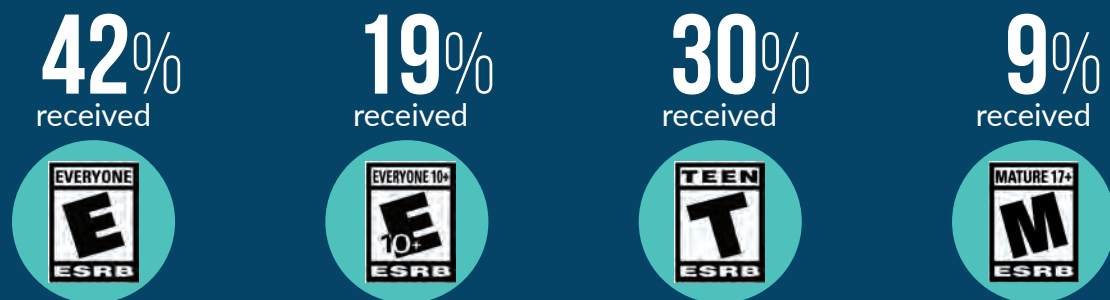
 **90%** of parents pay attention to the games their child plays  **77%** of parents regularly use the ESRB ratings

Parents limit the amount of time spent on the following activities




ESRB RATING DATA

Of the 2,768 physical and downloadable console games assigned ratings by the ESRB in 2018:



Among parents of gamers

 **57%** of parents play games with their child at least weekly

 **74%** of parents believe video games are educational





of families have a **child** who plays video games

HOUSEHOLDS WITH CHILDREN

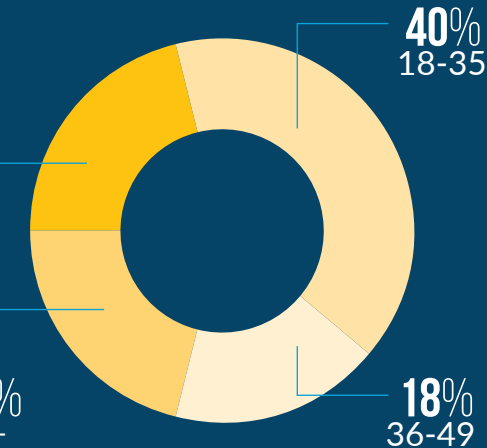


75% of Americans have at least **one gamer in their household**

When it comes to households,



21% of gamers are under 18



87% of parents **require permission** for new game purchases



91% of the most frequent purchasers of console, PC, and mobile games in gamer households are **adults**

Average age of most frequent game purchasers for



PC **38**



Smartphone **37**



Console **33**

MILLENNIAL GAMERS (18-34)

Male Millennial Gamers

AGES: 18-34

FAVORITE GENRES:
Action, Shooters & Sports Games

FAVORITE GAMES:
God of War, Madden NFL and Fortnite



of male Millennial gamers most often **play games on their game console**

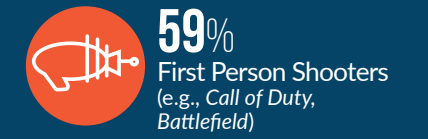


of male Millennial gamers most often **play Action games**



of male Millennial gamers prefer to **play with friends**

FAVORITE GAMES:



59% of male Millennial gamers have a creative hobby (drawing, painting, singing, writing) outside of video game play

MILLENNIAL GAMERS (18-34)

Female Millennial Gamers

AGES: 18-34

FAVORITE GENRES:
Casual & Action Games

FAVORITE GAMES:
Candy Crush, Assassin's Creed, Tomb Raider



of female Millennial gamers most often **play games on their Smartphone**

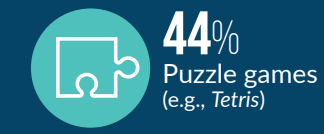


of female Millennial gamers most often **play Casual games**



of female Millennial gamers prefer to **play with friends**

FAVORITE GAMES:



67% of female Millennial gamers have a creative hobby (drawing, painting, singing, writing) outside of video game play

GEN X GAMERS (35-54)

Female Gen X Gamers

AGES: 35-54

FAVORITE GENRES:
Casual Games, including Puzzle
and Classic Arcades

FAVORITE GAMES:
Tetris & Pac-Man



of female Gen X gamers most often **play games on their Smartphone**

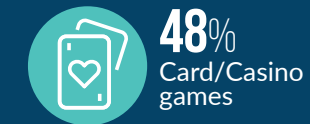
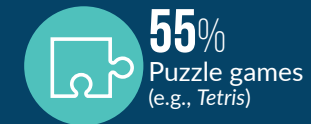


of female Gen X gamers most often **play Casual games**



of female Gen X gamers prefer to **play alone**

FAVORITE GAMES:



62% believe video games can be **educational**

68% believe they provide **mental stimulation**

GEN X GAMERS (35-54)



of male Gen X gamers most often **play games on their Smartphone**

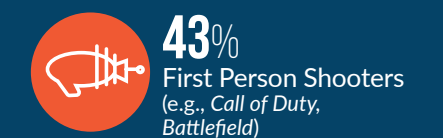


of male Gen X gamers most often **play Casual games**



of male Gen X gamers prefer to **play with friends**

FAVORITE GAMES:



62% believe video games can be **educational**

68% believe they provide **mental stimulation**

Male Gen X Gamers

AGES: 35-54

FAVORITE GENRES:
Sports, Racing & Shooters

FAVORITE GAMES:
Forza, NBA 2K, Call of Duty



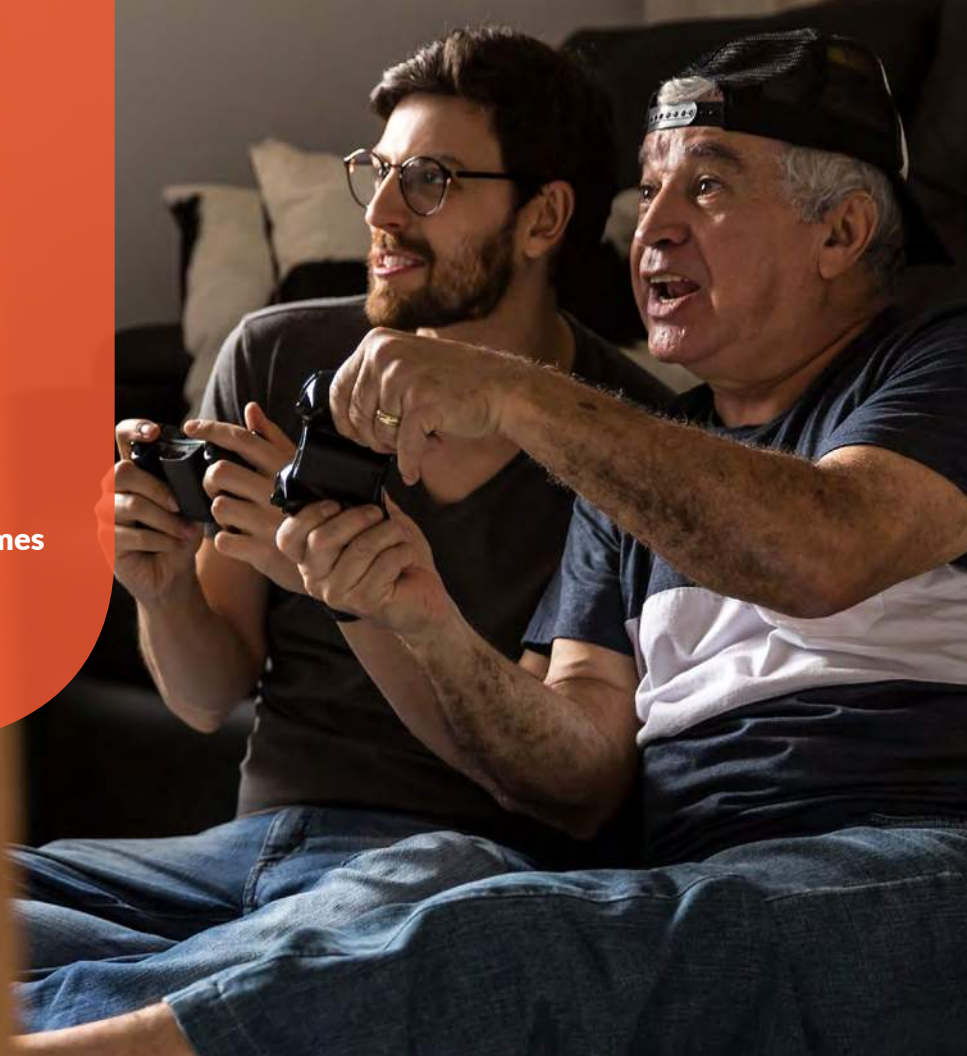
BOOMER GAMERS (55-64)

Male Boomer Gamers

AGES: 55-64

FAVORITE GENRES:
Card, Puzzle and Virtual Board Games

FAVORITE GAMES:
Solitaire & Scrabble



of male Boomer gamers most often **play games on their PC**

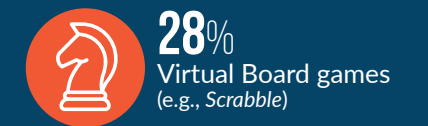
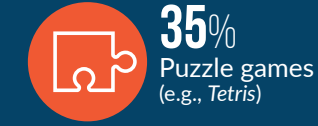


of male Boomer gamers most often **play Casual games**



of male Boomer gamers prefer to **play alone**

FAVORITE GAMES:



25% of Male Boomers have been video game players for **25+ years**

BOOMER GAMERS (55-64)



of female Boomer gamers most often **play games on their Smartphone**

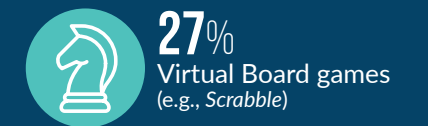
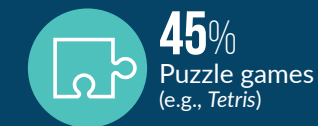


of female Boomer gamers most often **play Casual games**



of female Boomer gamers prefer to **play alone**

FAVORITE GAMES:



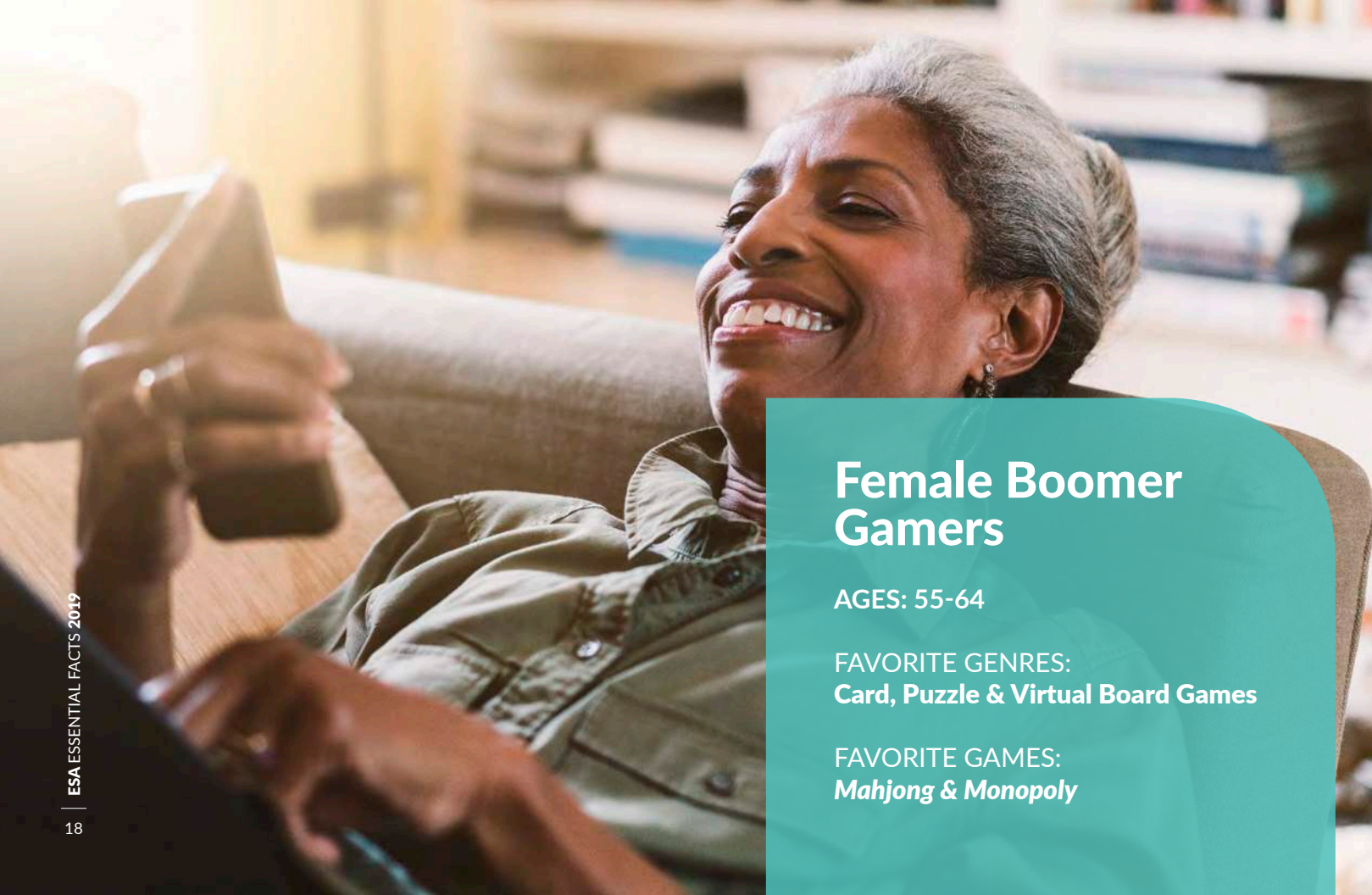
22% of Female Boomers have been video game players for **25+ years**

Female Boomer Gamers

AGES: 55-64

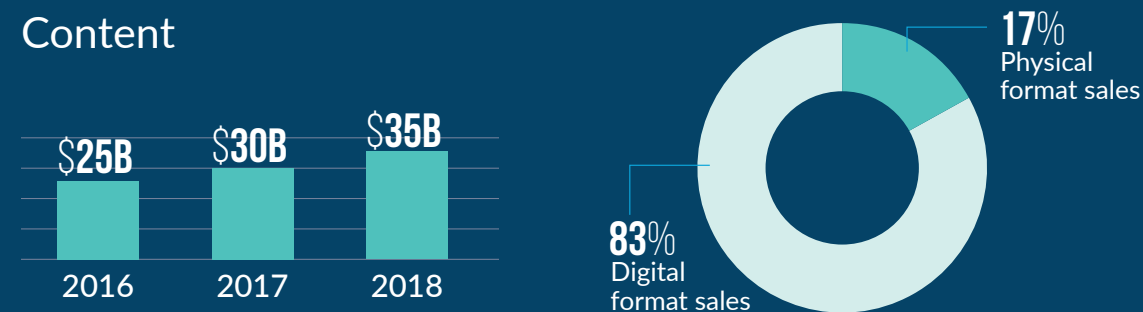
FAVORITE GENRES:
Card, Puzzle & Virtual Board Games

FAVORITE GAMES:
Mahjong & Monopoly



PURCHASING

Content



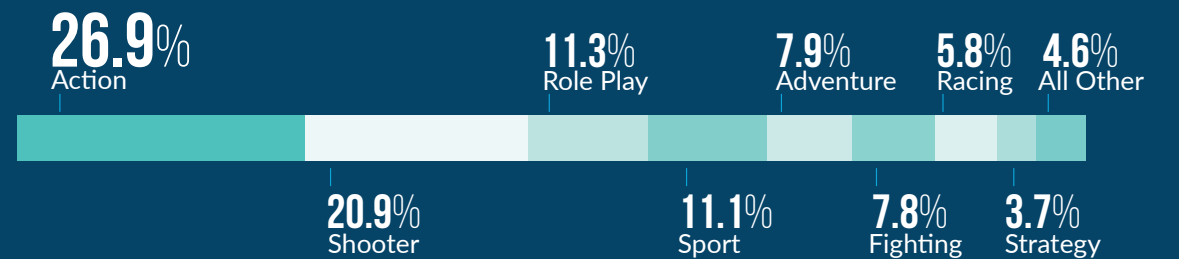
$$\begin{array}{cccc}
 \$35.8\text{B} & + & \$5.1\text{B} & + & \$2.4\text{B} & = & \$43.4 \\
 \text{Content} & & \text{Hardware} & & \text{Acc \& VR} & & \text{TOTAL}
 \end{array}$$

Top 20 Best-Selling Video Games of 2018 by Units Sold

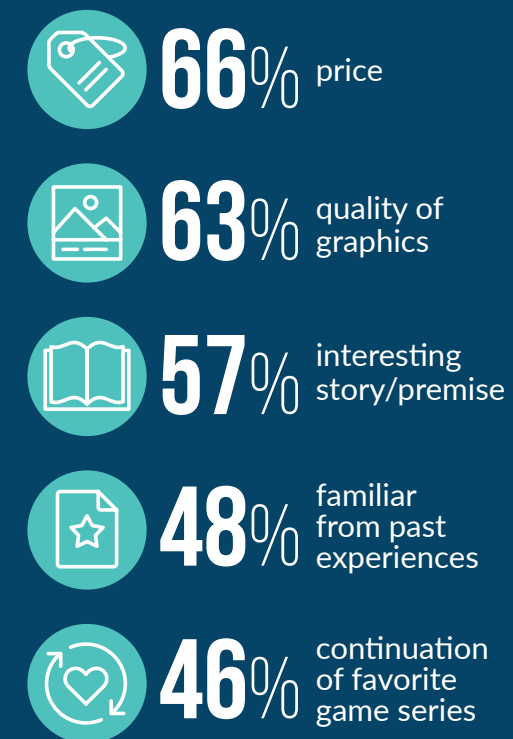
RANK	TITLE	ESRB
1	Call of Duty: Black Ops IIII	Mature (M)
2	Red Dead Redemption II	Mature (M)
3	NBA 2K19	Everyone (E)
4	Madden NFL 19	Everyone (E)
5	Grand Theft Auto V	Mature (M)
6	Super Smash Bros. Ultimate	Everyone 10+ (E10+)
7	Marvel's Spider-Man	Teen (T)
8	Far Cry 5	Mature (M)
9	God of War 2018	Mature (M)
10	Monster Hunter: World	Teen (T)
11	Minecraft	Everyone 10+ (E10+)
12	Tom Clancy's Rainbow Six: Siege	Mature (M)
13	Assassin's Creed: Odyssey	Mature (M)
14	FIFA 19	Everyone (E)
15	Mario Kart 8	Everyone (E)
16	Rocket League	Everyone (E)
17	PlayerUnknown's Battlegrounds	Teen (T)
18	Battlefield V	Mature (M)
19	Call of Duty: WWII	Mature (M)
20	Super Mario Odyssey	Everyone 10+ (E10+)

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

Best Selling Video Game Super Genres



Top 5 influences for purchase



Gamers say the following are useful when deciding on a purchase



ESA PARTNERS

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 dedicated to the advancement and recognition of the interactive arts. The organization has more than 30,000 members consisting of game developers in the United States and around the world. The mission of the AIAS is to promote and advance the worldwide interactive entertainment community; recognize outstanding achievements in the interactive arts and sciences; and host an annual awards show, the D.I.C.E. (Design, Innovate, Communicate, Entertain) Awards, to enhance awareness of the interactive art form. Other special programs and initiatives led by the AIAS also include the prestigious D.I.C.E. Summit and D.I.C.E. Europe, bringing together the top video game designers and developers from around the world and business leaders from all major publishers to discuss the state of the industry, its trends and the future; and Into the Pixel, an exploration and celebration of the art of video games. Please visit our website at: www.interactive.org

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.

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.

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.

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

- | | | |
|---|------------------------------------|--|
| 505 Games | Intellivision Entertainment, LLC | Sega of America |
| Activision Blizzard, Inc. | Kalypso Media Group | Six Foot LLC |
| BANDAI NAMCO Entertainment America, Inc. | Konami Digital Entertainment, Inc. | Sony Interactive Entertainment, Inc. |
| Bethesda Softworks, LLC | Legends of Learning | Square Enix, Ltd. |
| Bungie, Inc. | Magic Leap, Inc. | Take-Two Interactive Software, Inc. |
| Capcom U.S.A., Inc. | Microsoft Corporation | Tencent America |
| Deep Silver | Natsume, Inc. | THQ Nordic |
| Disney | NCSOFT | Ubisoft, Inc. |
| Electronic Arts, Inc. | NEXON America, Inc. | Warner Bros. Interactive Entertainment, Inc. |
| Epic Games, Inc. | Nintendo of America Inc. | Wizards of the Coast |
| Focus Home Interactive | NVIDIA Corporation | XSEED Games |
| Gearbox Publishing, LLC | Paracosma, Inc. | |
| GungHo Online Entertainment America, Inc. | Phosphor Studios | |
| | Rebellion Developments, Ltd | |
| | Riot Games | |

ESA offers a wide range of services to interactive entertainment software companies, 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 content protection program; owning and operating E3; and representing video game industry interests before federal and state governments.

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