

THE CHANGING FACE OF GAMING

REACH AND DIVERSITY IN THE GAMING MARKET



aop Advocate for Quality
Original Digital Content

SOME RESEARCH

01. **CONTEXT**

02. **MYTH**

03. **DEEPER UNDERSTANDING**

04. **STUDY (RESEARCH CATEGORIES)**

05. **STUDY PARAMETERS**

06-13. **THE DATA**

14. **TARGETING GAMERS**

15. **UNDERSTANDING YOUR GAMER**

16. **THE PRIZE**

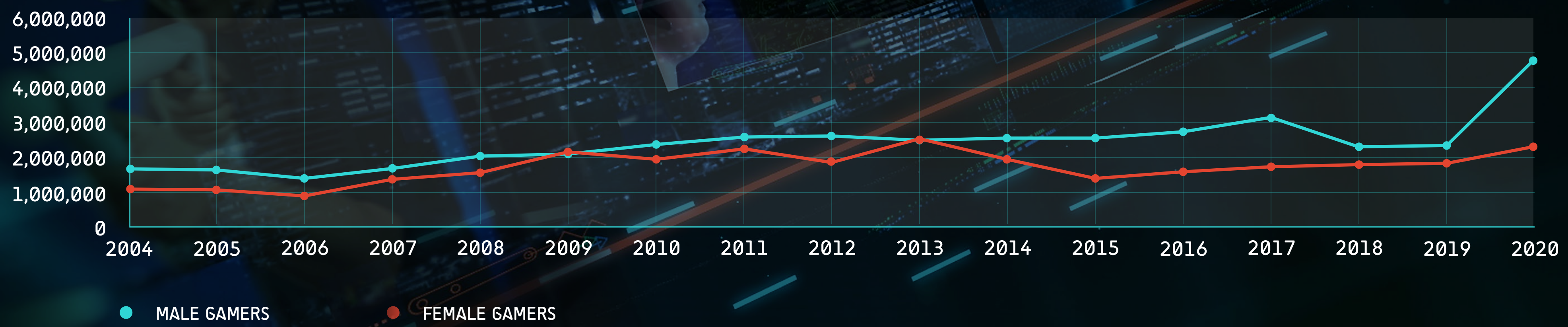
INTEREST IN GAMING HAS NEVER BEEN HIGHER

The continually growing range of products and platforms imply overall market growth.

The range of games from PC, to console, to phone defies single categorisation.

Over recent years gaming has seen steady growth in both male and female categories, especially in the 35+ age group.

GAMER TRENDS MALE & FEMALE +35
2004 - 2020



THE CHANGING FACE OF GAMING

BUT THE AUDIENCE IS CHANGING



02



MYTH
**GAMERS ARE MOSTLY
YOUNG & MALE**

**“THERE ARE THE FIFA AND COD PLAYING LADS ON ONE SIDE AND THE PC HARD
CORE GAMING NERDS ON THE OTHER.”**

Qual survey with the media strategists at agencies

DO YOU THINK GAMERS ARE MEN AGED 18 – 35 ? THEN THINK AGAIN

RACE

DISABILITY

RELIGION

GENDER
IDENTIFICATION

61M

34M

16.6M

UK POPULATION
AGED 6+

PLAYERS

ACTIVE GAMERS

GameSpot has always endeavored to get a better understanding of the attitudes and behaviours of gaming consumers around the globe.

In 2020 GameSpot commissioned Some Research via GameVision to carry out a one-off survey to get an even more granular view of gamers, taking their research to the next level.

This unique survey focussed on gamers in the UK market. They monitored the extent of gaming amongst protected categories: Race, Religion, Sexuality, Gender Identification and Disability.

Many of the prevailing myths have been crushed.

Surveys were carried out online - a quantitative survey with game users and qualitative online interviews with media strategy executives.

“IT IS A GOLD RUSH AT THE MOMENT.”

Qual survey with the media strategists at agencies



CATEGORIES TRACKED IN THIS STUDY

GENDER



AGE

LIFE STAGE



ETHNICITY

SOCIO
ECONOMIC

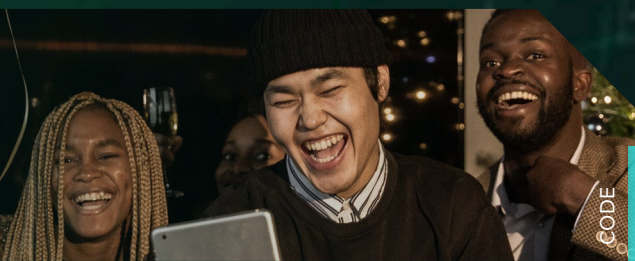


RELIGION
OR BELIEF

SEXUAL
ORIENTATION

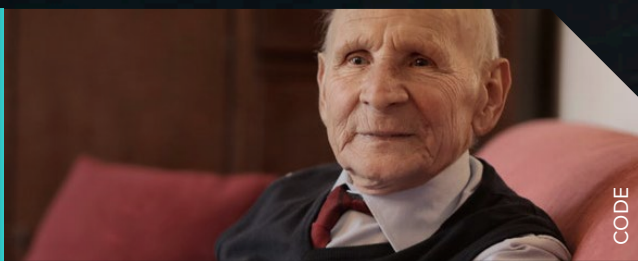
PLATFORM
PREFERENCE

MARITAL
STATUS



GENDER
REASSIGNMENT

RELIGION
OR BELIEF



DISABILITY



**“ACTUALLY “GAMERS” MEANS A VARIETY OF DIFFERENT AUDIENCES
– NEXT QUESTION IS WHICH GAMERS ARE YOU AFTER?”**

Qual survey with the media strategists at agencies

BREAKING DOWN THE AUDIENCE



ACTIVE GAMERS

* Those who have both played and spent money on gaming in the last 12-months (including where a game was bought for them).

The key metrics center on **Active Gamers**.

On average across Europe Active Gamers play games for 13:04 hours per week (8:37 hours on their own and 4:27 hours multiplayer).



PLAYERS

* Those who have played a video game in the last 12-months

06

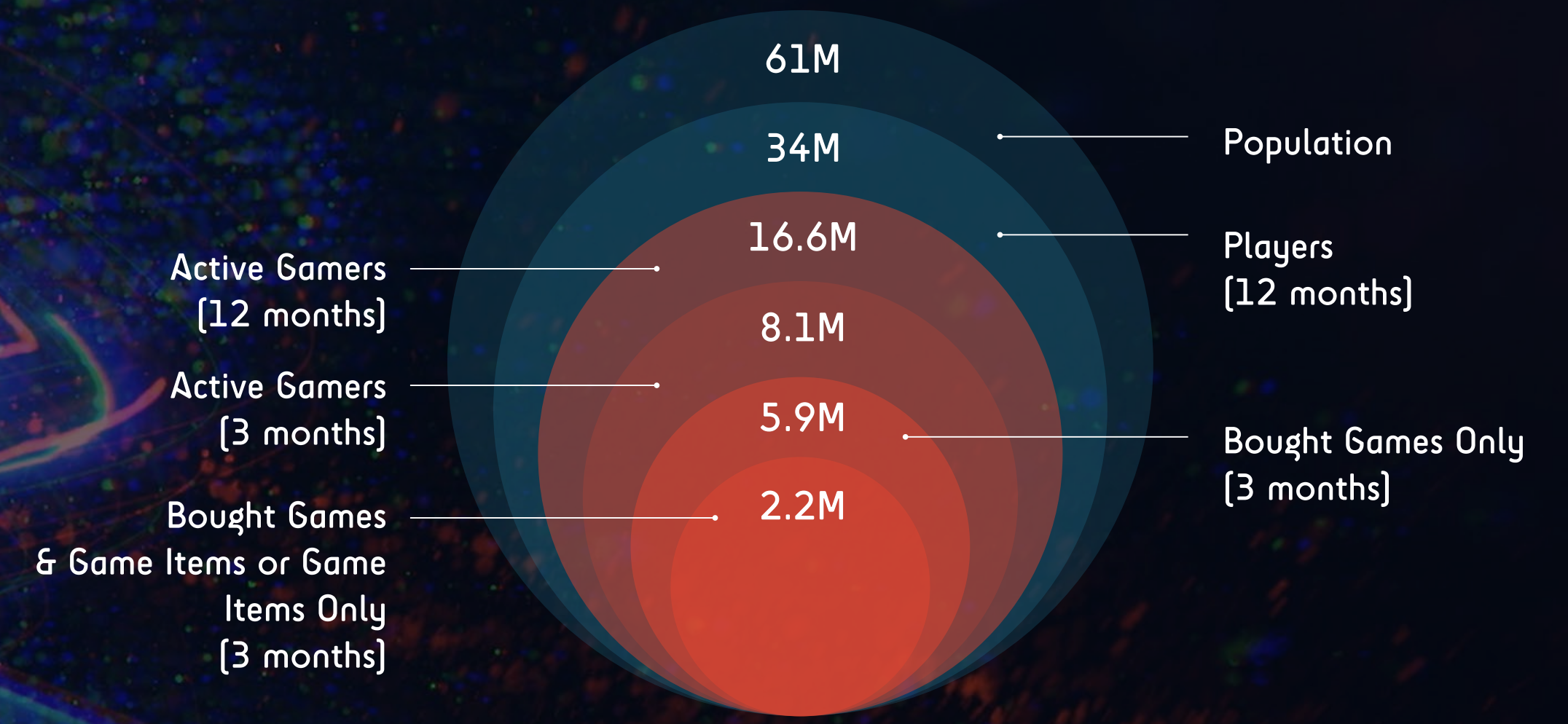
In the UK, more than half of the population aged six or above (34 million) have played a video game in the last 12 months, of that 34 million were categorized as Players and 16.6 million as Active Gamers. 8.1 million had spent money on gaming in the last 3 months.

Of those Active Gamers 62% were male and 38% female.

“HONESTLY I’M SURPRISED THAT IT IS ONLY 16.6 MILLION.”

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MARKET (MILLIONS)



TOP 5 MOST PLAYED GAMES (PROMPTED PLAY RATES)

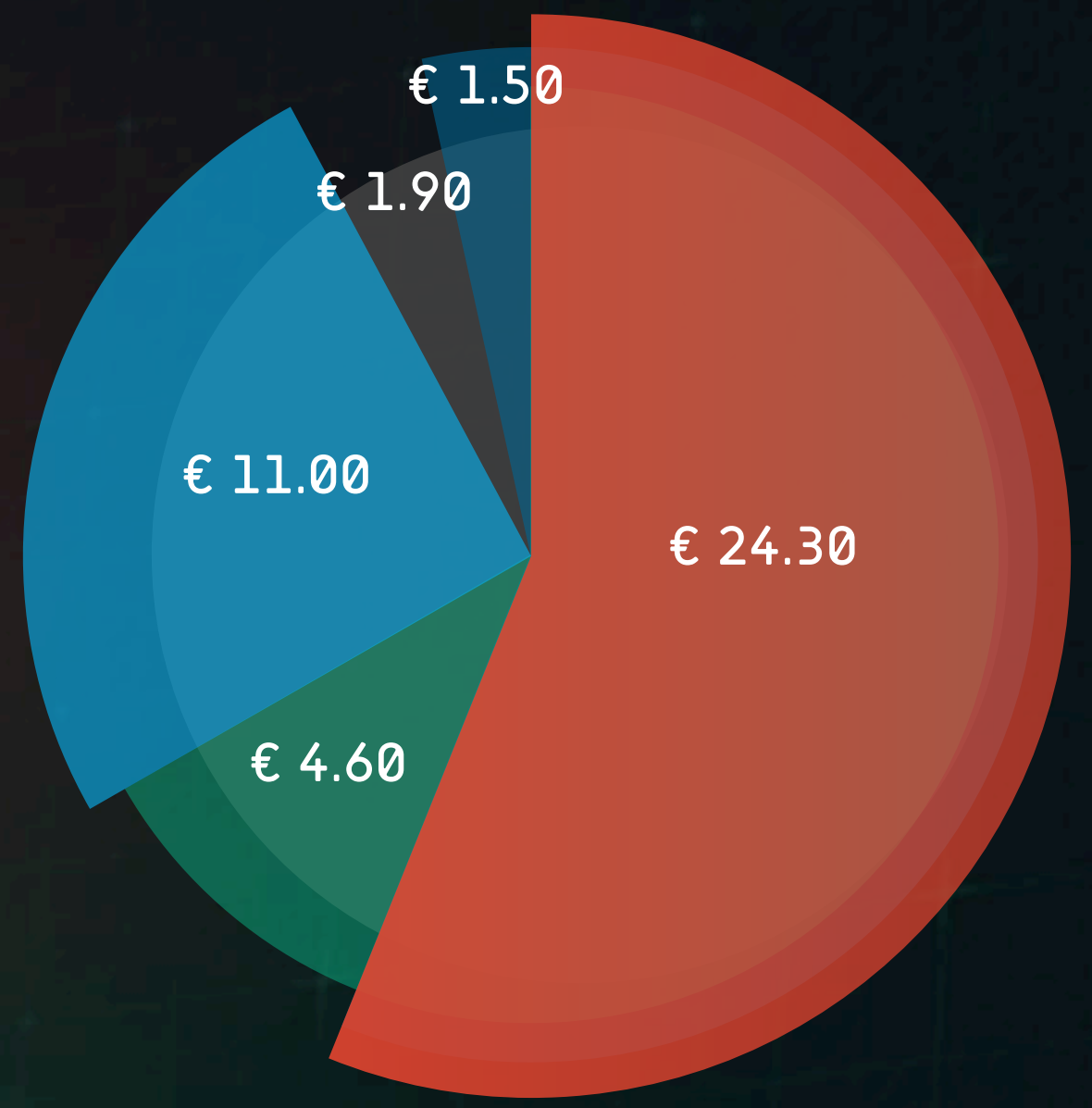


07

Whilst smartphones are the device of choice for Players; Active Gamers top two leading devices are PS4 and Switch.

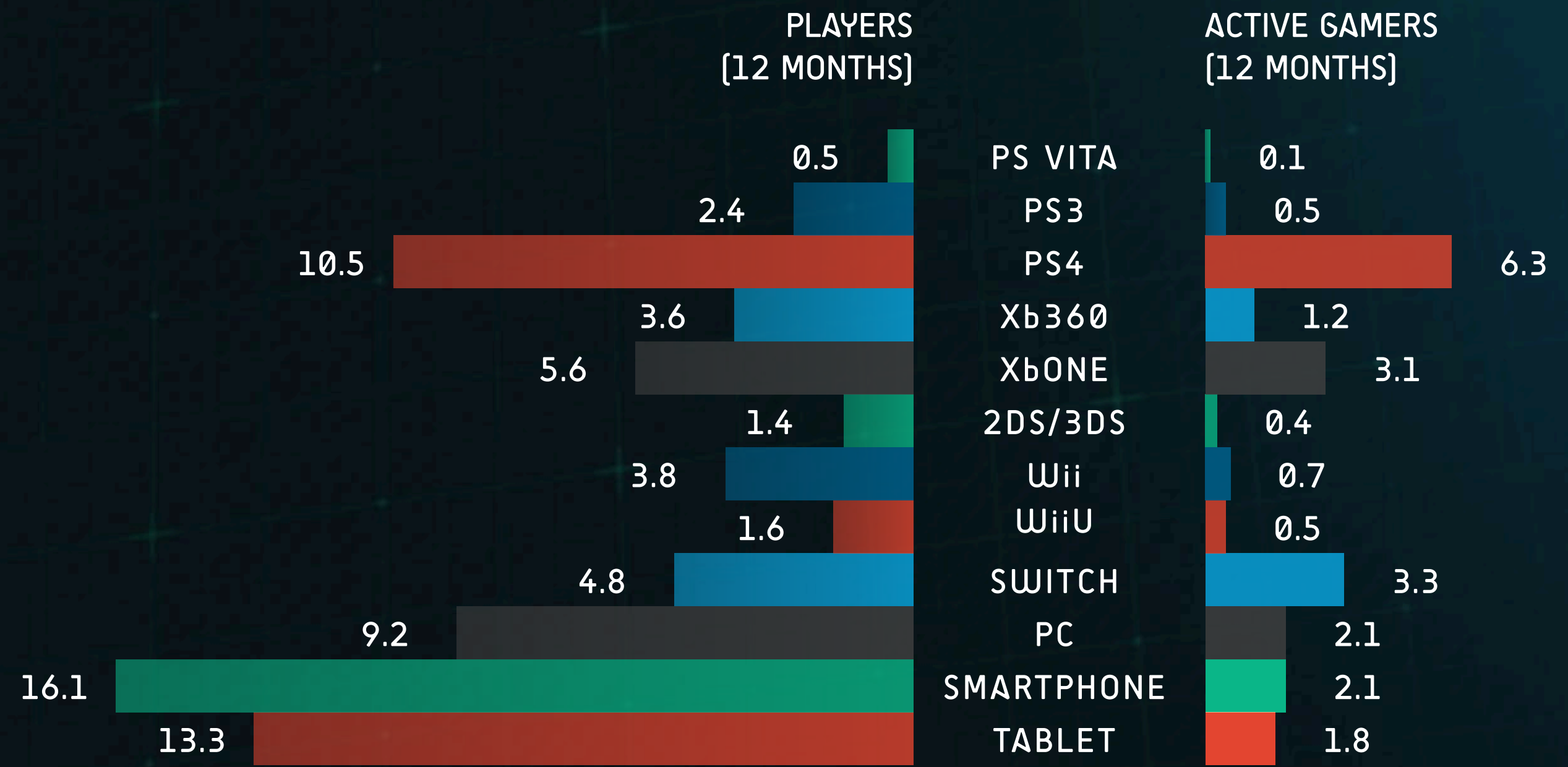
The largest spend is on new games from shops or website.

UK COUNTRY PROFILE
SHARE OF WALLET BY TYPE OF PURCHASE



- NEW GAMES FROM SHOP/WEBSITE
- SECOND HAND GAMES
- NEW DIGITALLY DOWNLOADED GAMES
- DOWNLOADABLE CONTENT
- OTHER

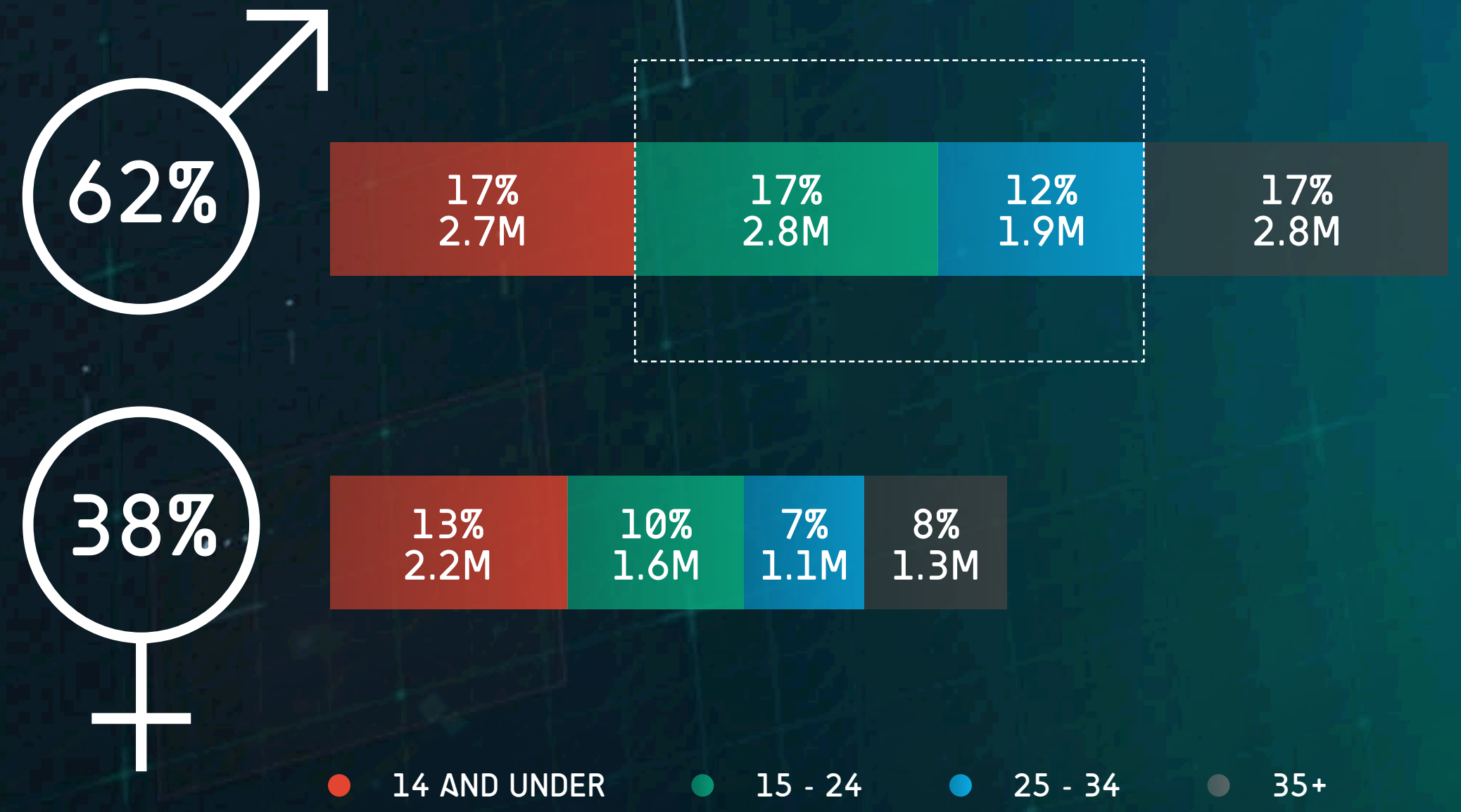
NUMBERS ON GAMES SYSTEMS (MILLIONS)



088

LESS THAN 3 OUT OF 10 GAMERS ARE WHO YOU THINK THEY ARE

Over seven in ten (71.3%, 11.8 million) of Active Gamers in the UK are not males aged between 15 and 34.



“IT MAKES IT STARKLY OBVIOUS THAT FOCUSING SOLELY ON THE MALE DEMOGRAPHIC WILL NOT DELIVER THE GROWTH THAT YOU NEED.”

Qual survey with the media strategists at agencies



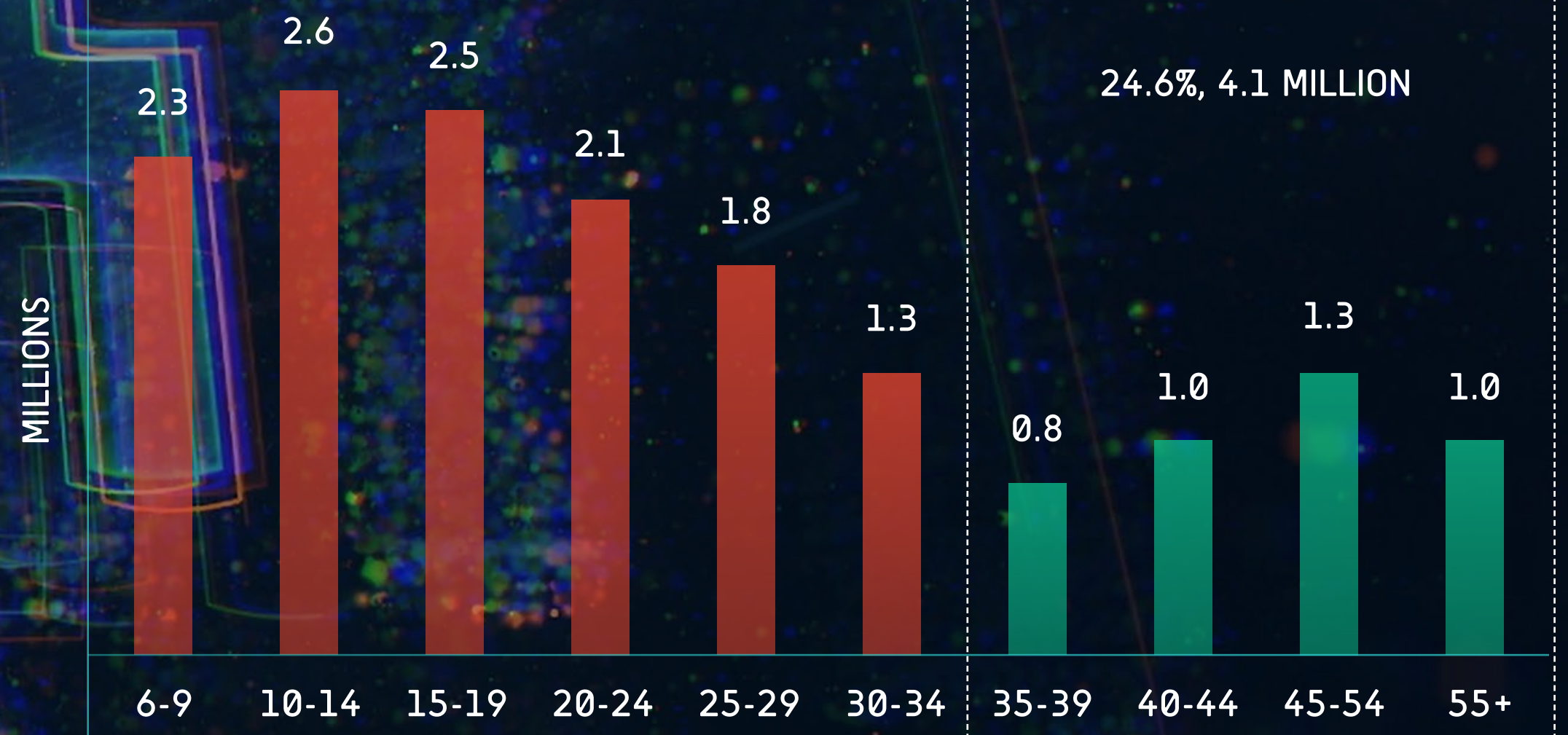
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A QUARTER OF ACTIVE GAMERS ARE 35+

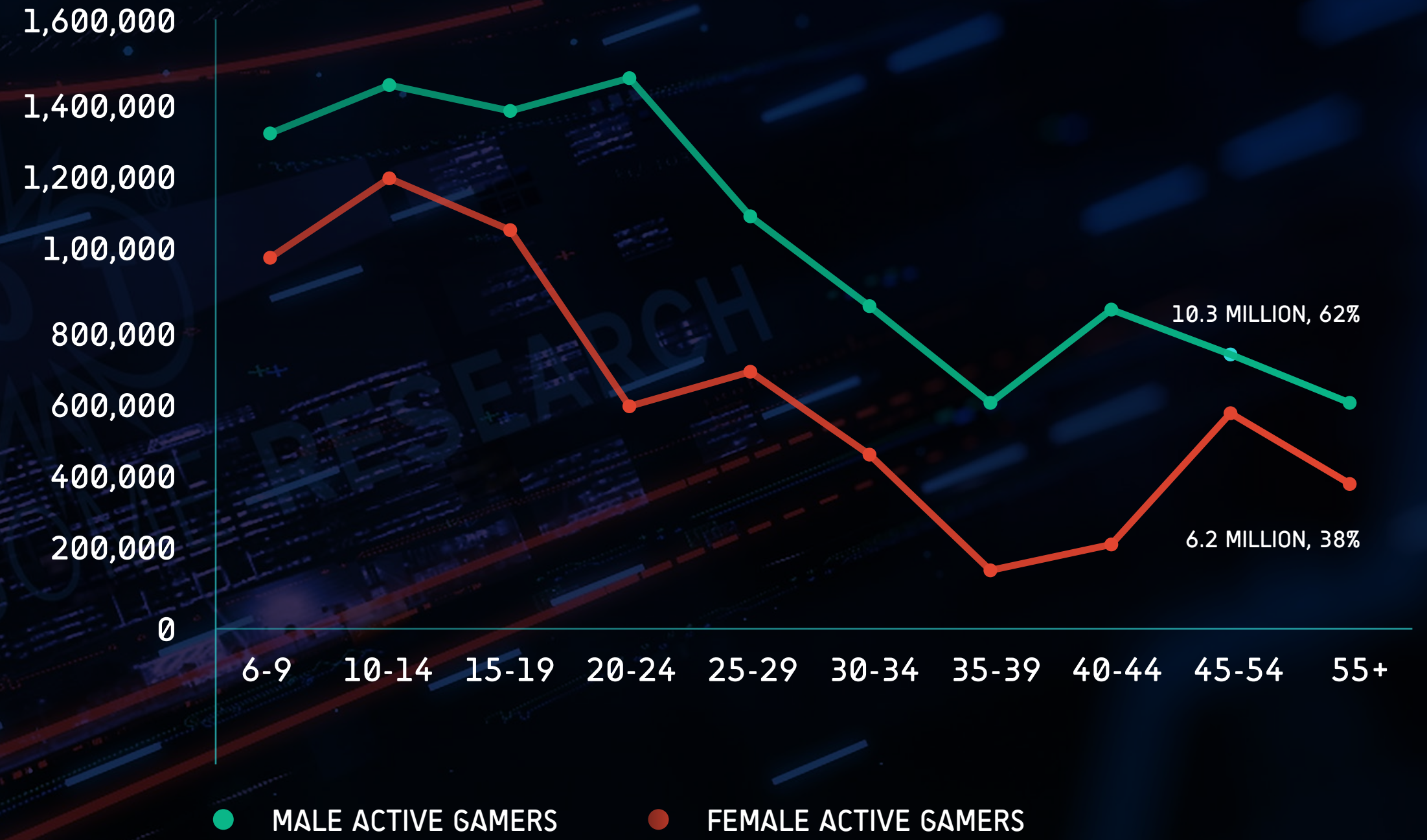
24.6% or 4.1 million of Active Gamers are over the age of 35. While there is a decline in the age group 35-39 - it grows to a peak with the 45 – 54 year olds.

Those over 45 play on average for 11.00 hours per week.

ACTIVE GAMERS (12 MONTHS)



410 6.3 MILLION (38%) OF ACTIVE GAMERS IN THE UK ARE FEMALE



“THE WAY IT TRACKS ALMOST IDENTICALLY EXCEPT EARLY 20’S IS INTERESTING.”

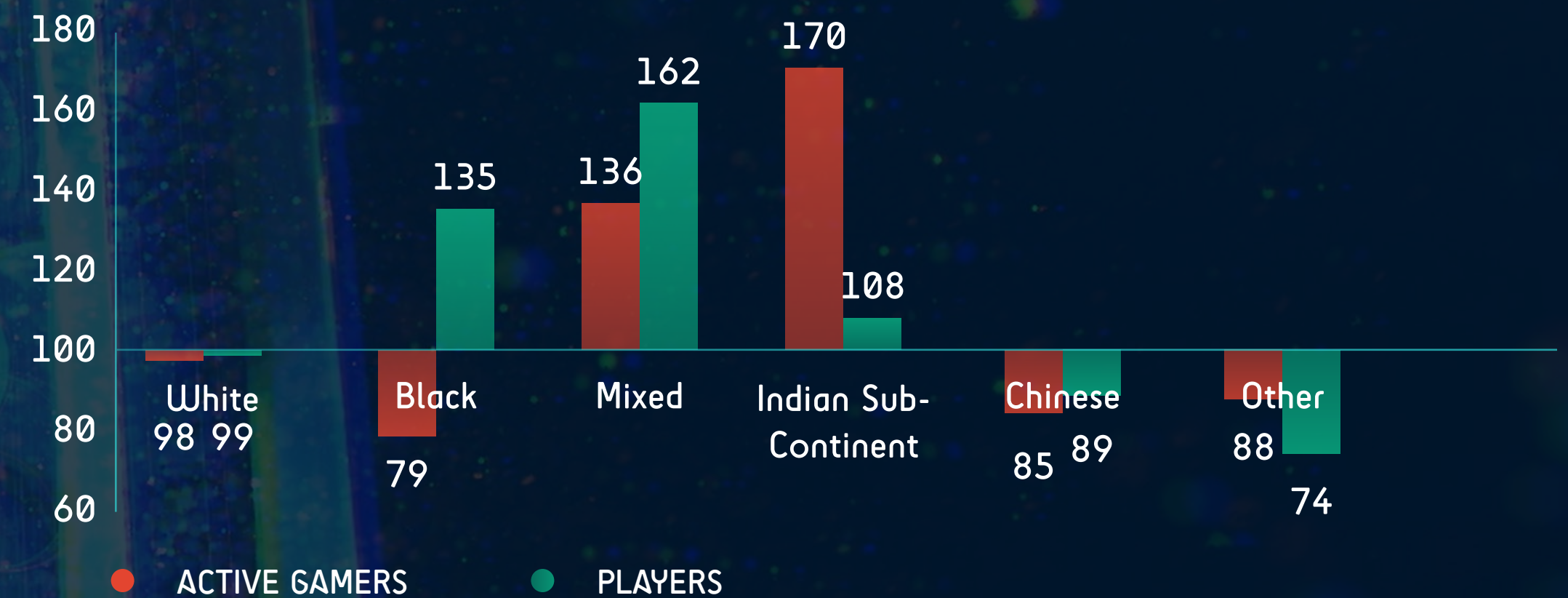
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11 PEOPLE OF BLACK ORIGIN ARE 35% MORE LIKELY TO PLAY GAMES THAN THE GENERAL POPULATION

People from the Indian sub-continent are 70% more likely to have paid for their gaming in the last 12 months.

| IN MILLIONS | WHITE | BLACK | MIXED | INDIAN SUB CONTINENT | CHINESE | OTHER |
|------------------|-------|-------|-------|----------------------|---------|-------|
| TOTAL POPULATION | 55.1 | 0.8 | 1.1 | 1.9 | 1.0 | 1.1 |
| PLAYERS | 30.3 | 0.6 | 1.0 | 1.1 | 0.5 | 0.5 |
| ACTIVE GAMERS | 14.6 | 0.2 | 0.4 | 0.9 | 0.2 | 0.3 |

INDEX VS TOTAL POPULATION



“SO THIS IS NEW TO ME AND INTERESTING STRAIGHT AWAY. THOSE INDIAN NUMBERS FOR INSTANCE – THAT’S HUGE. I LIKE TO KNOW MORE ABOUT THAT.”

Qual survey with the media strategists at agencies

12 SEXUAL ORIENTATION IS NOT A FACTOR IN WHETHER PEOPLE PLAY GAMES OR ARE ACTIVE GAMERS

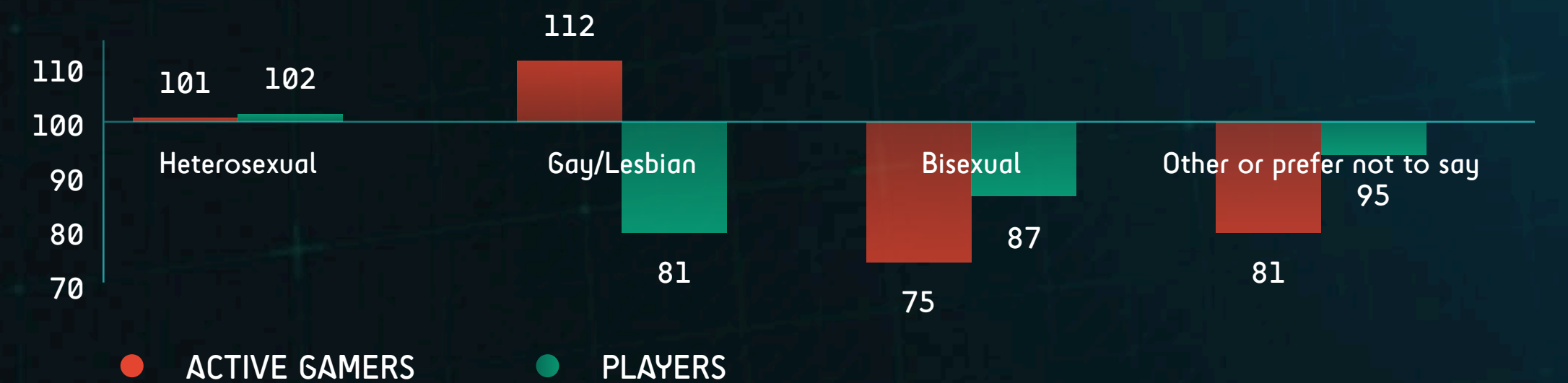
But it is a big consideration with regard to the type of games they play. Heterosexuals prefer casual games, sports and shooters. Gay/ Lesbian/ Homosexual gamers prefer platform, action adventure and online competitive games.

| IN MILLIONS | HETEROSEXUAL | GAY / LESBIAN / HOMOSEXUAL | BISEXUAL | OTHER OR PREFER NOT TO SAY |
|------------------|--------------|----------------------------|----------|----------------------------|
| TOTAL POPULATION | 54.4 | 2.6 | 1.5 | 2.5 |
| PLAYERS | 30.8 | 1.2 | 0.7 | 0.3 |
| ACTIVE GAMERS | 14.9 | 0.8 | 0.3 | 0.5 |

TOP 3 GAME GENRES PLAYED IN THE PAST 6 MONTHS BY PLAYERS

| HETEROSEXUAL | BISEXUAL | GAY / LESBIAN / HOMOSEXUAL |
|--------------|------------|----------------------------|
| CASUAL | Casual | Platformers |
| SPORTS | Simulation | Action-adventure |
| SHOOTERS | Strategy | Online competitive |

INDEX VS TOTAL POPULATION



“YOU WANT THIS TO PROVE THAT GAMING HAS BECOME A MORE WELCOMING COMMUNITY.”

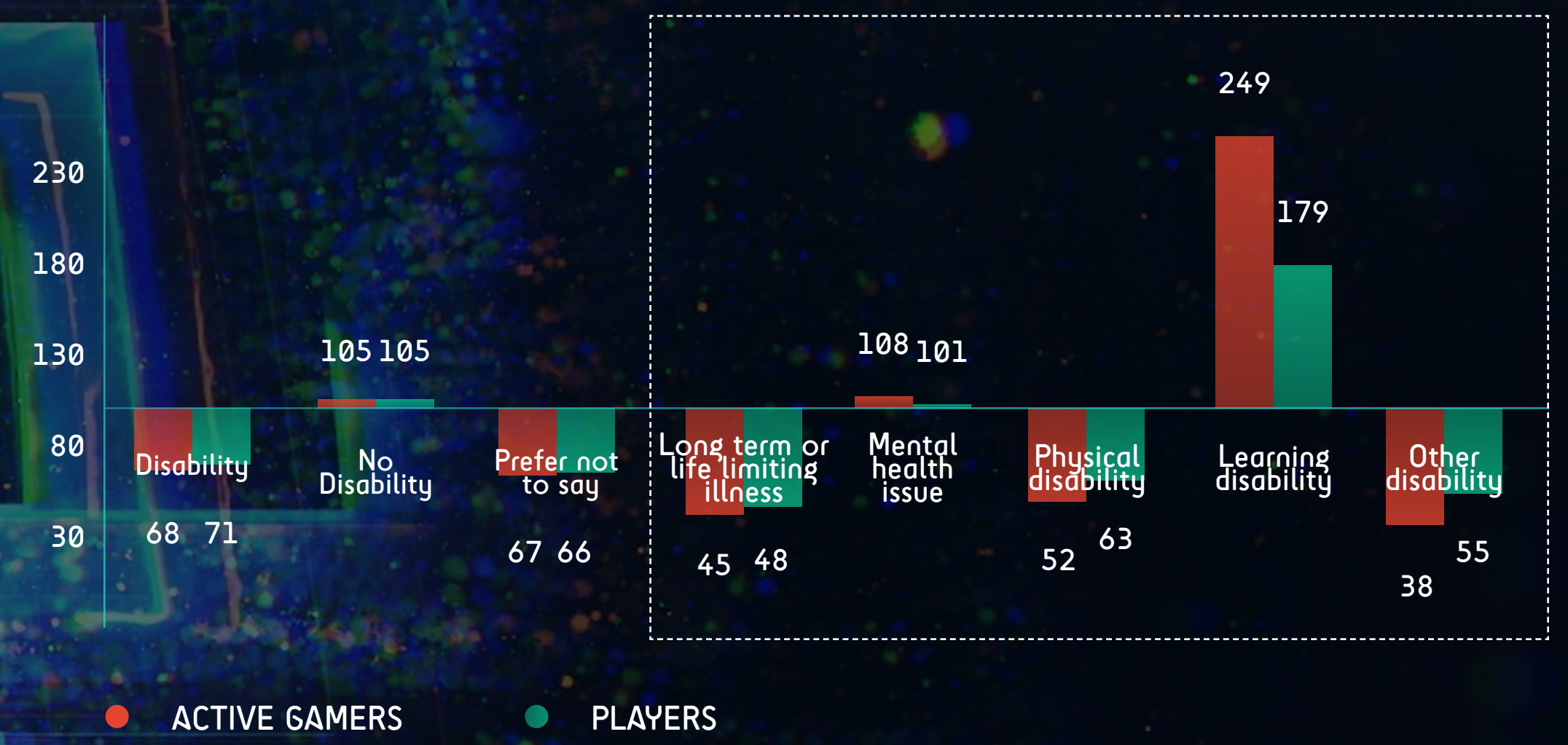
Qual survey with the media strategists at agencies



1.3 8.5% OF ACTIVE GAMERS (1.4 MILLION) HAVE SOME FORM OF DISABILITY.

| IN MILLIONS | DISABLED | NOT DISABLED | PREFER NOT TO SAY |
|------------------|----------|--------------|-------------------|
| TOTAL POPULATION | 7.6 | 52.2 | 1.1 |
| PLAYERS | 3.0 | 30.6 | 0.4 |
| ACTIVE GAMERS | 1.4 | 14.9 | 0.2 |
| NON PLAYERS | 4.6 | 21.6 | 0.7 |

INDEX VS TOTAL POPULATION



Proportionally, people with disabilities are 32% less likely to be an Active Gamer than the general population. However those who are specifically disabled by having learning difficulties are 149% more likely than the population in general to be Active Gamers.

“THIS WAS SURPRISING AND ENTHRALLING. IT POINTS TO SUCH AN OBVIOUS AUDIENCE.”

Qual survey with the media strategists at agencies

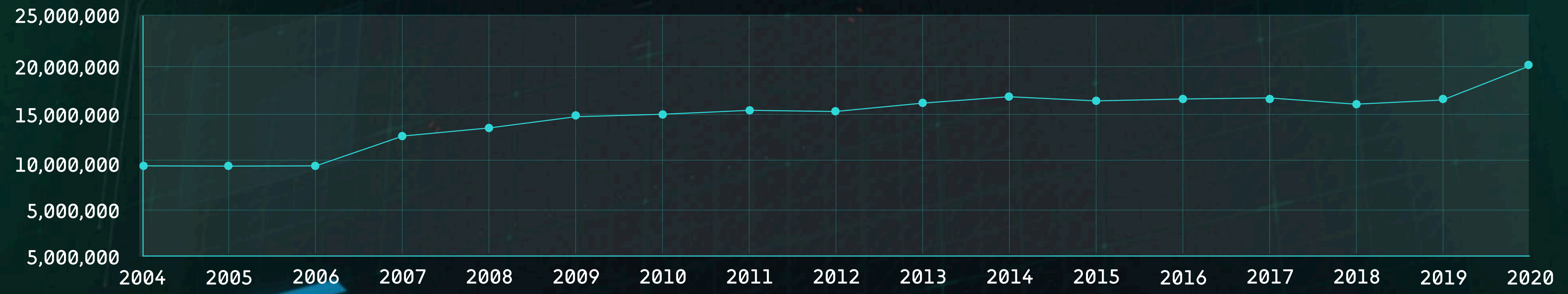
During an individuals lifetime they are progressively less likely to game except males go up in their early/ mid twenties and females reduce. Both nearly stop completely in their mid thirties with both recovering after that period of maxifamilial. At all ages females are less likely to game than males.

Data is the key driver whether from game producers themselves or from social media and influencers in the digital space.

GAMERS ARE VERY DIGITALLY AWARE.

As the gamers demographics have changed so have the ways of targeting them – Traditional media has been supplanted by digital.

GAMER TRENDS 2004 - 2020



Understanding the culture and the language of the gamers you are targeting is vital.

The most commonly mentioned sub groups of gamers that can be focussed on are:

CASUAL/HARDCORE

AGE

GAME HARDWARE AFFINITY

TITLE AFFINITY

SPEND

CONSOLE PC OR PHONE

Communication needs to appeal to the real more diverse audience of gamers and not the preconceived young male one.

“I JUST DON’T SEE THE POINT OF HAVING A HALF NAKED WOMAN ON THE FRONT. THERE’S A WHOLE ASSUMPTION THAT WOMEN AREN’T GAMERS – AND IT’S JUST WRONG.”

Qual survey with the media strategists at agencies

The games market has grown fast but can now be taken to another level, by capitalising on this rich and varied audience we can develop potential tie ups with a range of verticals such as:



“IT’S TIME TO LOOK AGAIN AT THE GAMING AUDIENCE.”

Qual survey with the media strategists at agencies

