Gamer Segmentation
2018/2019 Syndicated Report

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COOPER WADDELL
+1.760-579-7120
Cooper.Waddell@npd.com
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2018/2019 Gamer Segmentation Report

A 360° View of US Gamers

EEDAR’s 2018/2019 Gamer Segmentation Report gives you a holistic picture of US gamers by approaching the market from multiple angles - first, exploring the six overarching gaming audiences (identified based on their total gaming profiles), and then providing targeted profiles of gamers by platform and demographic group. Data in the 2018/2019 Gamer Segmentation Report is from a consumer survey of five thousand active US gamers (age 2+) who play games across mobile, PC, console and/or handheld.

Key Benefits

- Profiles of the six overarching gamer audiences that reflect distinct sets of gaming habits, interests and investment
- Demographic audience profiles show gamer habits at different stages of life, and how these habits can change over time
- Platform profiles for mobile, PC, console and handheld that examine who is using each type of device to play games, and the role that the device plays in their gaming ecosystem
- Examination of key trends for each platform, their primary use-case(s) and limitations
- Details on general entertainment habits and spend to provide context for gaming investment

CONTACT

For full report pricing and more information, contact Cooper Waddell at solutions@eedar.com
Overview & Methodology

2018 Report Overview
The EEDAR 2018/2019 Gamer Segmentation Report examines the gaming habits of active US gamers age 2+, identifies key market segments that reflect distinctive approaches to gaming, and profiles these segments.

This analysis is broken into four sections, including:

I. US Gaming Audience Overview
II. Behavioral Segmentation & Profiles
III. Platform Audience Profiles
IV. Demographic Audience Profiles

The first section provides an overarching view of the US games market in terms of the number of active gamers, and their general gaming habits. This analysis explores broader trends in the market in terms of gaming investment, engagement with games outside of direct play (e.g. esports, video streaming), and gaming’s share of entertainment wallet / time.

The second section focuses on creating a segmentation based on gamers’ behaviors, interests, and motivations. The methodology behind this segmentation is described, and detailed profiles of the resulting audience groups are provided.

The third section segments the US audience based on the devices they use to play games, and provides player profiles for the major platforms – mobile, PC, console, and handheld. These profiles include specific looks at the types of motivations and interest that help to drive platform choices, and examines key use cases (and limitations) for each platform type.

The fourth section then segments the US audience based on their age and gender, and provides profiles of their specific gaming habits. These profiles examine how device preferences / usage and gaming habits are likely to change as gamers get older.

Data Sources & Methodology
The analysis in this report is based on an online survey of 5,000 active US gamers (age 2+) conducted in June 2018. Participants in this survey were recruited from two representative pools:

- **Adults** (respondents age 18+) were recruited for participation directly and completed the survey based on their own habits.
- **Children / Teens** (age 2 – 17) were recruited via parent surrogates.
  - Children over age 10 were instructed to complete the survey themselves (with parental help, if needed). Parents of younger children were asked to complete the survey on the child’s behalf, with the child’s help.

Respondents qualified as active gamers for the purpose of the study if they met the following criteria:

- **Own or have access to (if shared) at least one qualifying device:**
  - **Mobile**: iPhone, iPad, Android smartphone, Android tablet, Kindle Fire / Kindle Fire HD, Windows phone, Windows Surface, Other smartphone or tablet device
  - **Computer**: Desktop, Laptop
  - **Console**: PlayStation 4, PlayStation 4 Pro, Xbox One, Xbox One X, Nintendo Switch, PlayStation 3, Xbox 360, Nintendo Wii U, Nintendo Wii
  - **Handheld**: Nintendo 3DS or 2DS, PlayStation Vita

- Personally used at least one qualifying device to play a video game within the month of the survey

Platform / Device segments are based on usage within the past month of play on at least one qualifying device:

- **Mobile Gamer**: played a game on a smartphone or tablet
- **PC Gamer**: played a game on a desktop or laptop computer (not specific to Windows OS).
- **Console Gamer**: played on a game on a qualifying console
- **Handheld Gamer**: played on a qualifying handheld device
Overview of the Findings

67% of Americans play video games

211.2MM Total Gamers (Ages 2+)

41% play games on only one platform
  - 34% only use mobile devices

59% use at least a mobile device and PC or console
  - 27% use all three (mobile, PC, and console)

Gamers spend an average of 12 hours a week playing video games.

They spent an average of $55
On video game purchases in the past 6 months.

90% of gamers play on a smartphone / tablet
Mobile Gaming is the most common form of gaming and typically accounts for half of gamers’ weekly play. Most play because the device is one they already own and carry, and the experiences are cheap / accessible.

52% of gamers play on a desktop / laptop
PC gaming does not have a cohesive identity as it appeals both to casual gamers (who enjoy easy access to familiar game types) and core gamers (who like the hardware customizability and range of control options).

43% of gamers play on a gaming console
Consoles are the device of choice for gamers who are seeking more action-oriented core experiences (e.g. Shooters, Sports), who want to play with friends, or who prefer a more casual setting for their gaming.

9% of gamers play on a gaming handheld
Handheld use is most common among deeply invested gamers (who play on everything) and those who seek a traditional gaming experience on a device that is more flexible and does not require TV access.

9% of gamers play on other devices
Use of virtual reality headsets, plug-and-play devices (e.g. Nintendo NES Classic Edition), and child-oriented devices (e.g. Leapfrog) is generally very low.

Gamers are defined as those who have used a qualifying mobile, PC, console or handheld device to play a game in the past 6 months. Time and spend are based on self-reported habits and investment across devices used.
Overview of the Findings

Clustering gamers based on the platforms they use, their play habits, investment, and preferences on those platforms reveals six behavioral segments that reflect unique approaches to gaming. These range from extremely core and invested (on the left) to extremely casual (on the right).

<table>
<thead>
<tr>
<th>Segment</th>
<th>Description</th>
</tr>
</thead>
</table>
| SUPER GAMERS     | 13% of US Gamers
Super invested, and super engaged – this audience reflects the broadest and deepest gamers on the market. |
| CONSOLE WARRIORS | 14% of US Gamers
Console-centric gamers who keep up with the latest gaming trends, and enjoy action-packed multiplayer experiences. |
| TRANSITIONALS    | 11% of US Gamers
Invested adult gamers whose stage of life means shifting from HD-centric gaming to more flexible mobile gaming. |
| EASY ACCESSORS   | 17% of US Gamers
Younger gamers whose choice of platform is constrained by access, leading them to play primarily on mobile. |
| DAILY DABBLERS   | 19% of US Gamers
Older gamers who regularly set aside time to play familiar casual games on PC and/or mobile. |
| INCIDENTAL PLAYERS| 26% of US Gamers
Non-“Gamers” who play mobile games because they are convenient and provide another way to use their device. |

These groups are exclusive – meaning a gamer will only fit into one segment at a given time – but they are not static. This means that the average gamer will move through multiple segments over the course of their life, and that most of these shifts would be expected around major life stage changes (see pg. 8 for a discussion of these changes).

A description of the segmentation methodology can be found on pg. 23, and detailed profiles of the segments are included on pgs. 28 – 51.
US Gaming Audience Overview
67% of Americans play video games on at least one type of device, with over half of these playing across multiple platform types (59% of gamers).

Gamers are most likely to play on a multi-purpose device (97% of gamers use a Smartphone, Tablet, Desktop and/or Laptop Computer).

Play on a designated device is generally lower (43% of gamers use a console and/or handheld).

211.2MM Total Gamers (Ages 2+)

Play rates reflect total reported use of a qualifying device to play a video game within the past month by Americans age 2+.
Device types for each platform include: Mobile (smartphone, tablet), PC (desktop or laptop computer), Console (PS4, PS3, Xbox One, Xbox 360, Nintendo Switch, Wii U, Wii), Handheld (Nintendo 3DS or 2DS, PS Vita)
US Gaming Audience Overview

Watching & Streaming Games

70% of US gamers watch videos online
[on YouTube, Twitch and/or Mixer]

Watch video game content 43%
Stream themselves playing games 4%

90.7MM Gamers
Watch game content online
[on YouTube, Twitch and/or Mixer]

Gamers who watch video online spend an average of 12 hours a week watching video content on YouTube, Twitch, and/or Mixer.

For those who watch games – game content accounts for an average of 33% of total streaming time or 7 hours.

How has watching game content impacted your gaming habits?

I have used a video guide to help me get past a challenging section or improve my play 51%
I bought / played a game because I saw someone play it online 33%
I experienced a game I wouldn’t have played myself 26%
I didn’t buy / play a game because I could watch instead 26%

% of Video Game Content Watchers

The impact of watching game content online on gamers’ habits and broader gaming experience is largely positive –

- 21% indicate they are spending more time playing games since they started watching (only 12% indicate they play less).
- Videos are more likely to be seen as a means of enhancing game experiences – as learning aids, discovery tools, or an opportunity to experience games they do not typically play (see above) – than they are to be replacements (only 26% have decided not to play a game because they could watch instead).

YouTube
69% use
42% watch games
Weekly game time: 6 hrs.

Twitch.tv
9% use
7% watch games
Weekly game time: 4 hrs.

Mixer
<1% use
<1% watch games
Weekly game time: 1 hrs.

Rates reflect gamers’ self-reported engagement with online video streaming on YouTube, Twitch.tv and Mixer.
“Video game content” includes any video-game related content such as live-streams of games, Let’s Plays, reviews, tutorials/walkthroughs, and tournament play.
Esports engagement is low among the US gaming audience – only 35% report they have heard of esports, and 11% have participated in some way (in the past year).

Gamers who are aware and engaged with esports are generally younger and more male than those who are not aware.

What esports-related activities have you participated in in the past year?

- Watched a tournament online: 23%
- Watched a tournament on TV: 12%
- Purchased digital esports content: 4%
- Purchased physical esports merchandise: 3%
- Attended an esports event: 2%
- Competed in a tournament: 2%

Not Aware
- 65% of US Gamers
  - Avg. Age: 33.6
  - % Male: 42%

Aware, Not Participant
- 24% of US Gamers
  - Avg. Age: 31.2
  - % Male: 58%

Participants
- 11% of US Gamers
  - Avg. Age: 26.5
  - % Male: 79%

70% of esports-aware gamers do not participate

29% of esports-aware gamers watch events

6% of esports-aware gamers buy merch. / content

Based on responses to the questions “Prior to this survey were you aware of Esports (i.e. organized leagues and tournaments associated with video games)?” and “In the past year, have you participated in any of the following Esports-related activities?”
32% of PC/Console gamers report play of an HD GaaS (Games as a Service) game in the past year.

- Avg. number of games played (past year): 2–3

21% of PC/Console gamers report that they currently play or have recently (within the past 3 months) played an HD GaaS game.

- Avg. number of games played (past 3 months): 1–2
- 25% of these indicate that HD GaaS games account for the majority of the play time on PC/Console.

57% of HD GaaS players report that they have churned from an HD GaaS game in the past year.

- Avg. number of games churned: 1–2
- 50% of churners do not currently play a GaaS game

Current GaaS gamers HD gaming habits:

- Avg. total weekly PC/console time: 17 hours
- % of play time is in a GaaS game: 45%
- Avg. weekly GaaS play: 8 hours

Data only reflects self-reported play of PC or console Games as a Service games, and does not include play of GaaS mobile games (as most games would qualify). GaaS games include reported play of Free-to-Play PC / console games, subscription PC / console games, and retail releases with ongoing support.
### Which of the following activities do you participate in?

<table>
<thead>
<tr>
<th>Activity</th>
<th>% of Gamers Participate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Playing games on a mobile device</td>
<td>90%</td>
</tr>
<tr>
<td>Watching TV shows or Movies</td>
<td>88%</td>
</tr>
<tr>
<td>Going out to eat / drink</td>
<td>84%</td>
</tr>
<tr>
<td>Listening to music</td>
<td>83%</td>
</tr>
<tr>
<td>Browsing the internet</td>
<td>80%</td>
</tr>
<tr>
<td>Watching video content online (e.g. on YouTube)</td>
<td>70%</td>
</tr>
<tr>
<td>Checking or posting to social media</td>
<td>68%</td>
</tr>
<tr>
<td>Exercising or playing sports</td>
<td>59%</td>
</tr>
<tr>
<td>Going to the movies, shows or concerts</td>
<td>55%</td>
</tr>
<tr>
<td>Playing video games on a PC</td>
<td>52%</td>
</tr>
<tr>
<td>Playing with traditional toys, puzzles, or games</td>
<td>50%</td>
</tr>
<tr>
<td>Reading or listening to audiobooks</td>
<td>47%</td>
</tr>
<tr>
<td>Participating in other hobbies</td>
<td>45%</td>
</tr>
<tr>
<td>Watching sports events in person or on TV</td>
<td>45%</td>
</tr>
<tr>
<td>Playing video games on a console</td>
<td>43%</td>
</tr>
<tr>
<td>Going to amusement parks / recreation centers</td>
<td>35%</td>
</tr>
<tr>
<td>Play video games on a handheld</td>
<td>9%</td>
</tr>
</tbody>
</table>

Leisure activities measured only include those directly associated with consumption of goods or content (full list in chart above), and do not include other activities. Share of time and spend reflect averages for those who participate in the activity. Spend includes money personally spent on activity, as well as money spent by others on the gamers' behalf, and reflects a 6-month total value for the activity (e.g. half of an annual subscription or fee).
Behavioral Segmentation & Profiles
Behavioral Segmentation & Profiles Methodology

Purpose & Methodology

The purpose of this segmentation is to identify key gaming audiences on the basis of their gaming habits, interests, and investment on mobile, PC, console, and handheld.

This analysis took place in two stages:

1. Principal component analysis was used to identify key factors associated with engagement on each platform (mobile, PC, console, and handheld).
2. Platform-based factors were subjected to k-means clustering to group individuals together on the basis of shared gaming habits across platforms.

Platform-Based Factors

The platform-specific variables were reduced to the following factors for use in the cluster analysis:

Mobile Gaming
1. Valuing convenience, flexibility, and accessibility
2. Play of core mobile genres (e.g. Action, Strategy)
3. Play of casual Puzzle genres
4. Play of familiar games (Casino, Skill & Chance)
5. Play of Arcade, Racing, or Music games
6. Enjoyment of immersive experiences and customization
7. Affinity for branded games
8. Play with friends, play of games people are talking about
9. Heavy spend and play

PC Gaming
1. Valuing the customizability and control of hardware
2. Play of action-oriented games (e.g. Sports, Shooters)
3. Enjoyment of multiplayer and PC superiority
4. Play of casual genres on a convenient machine
5. Heavy spend and play
6. Playing online or exclusive games

Console Gaming
1. Valuing the console plug-and-play convenience
2. Enjoyment of action-oriented, multiplayer games
3. Play of console-exclusive, core games
4. Enjoyment of playing together with friends
5. Play of casual genres
6. Enjoyment of immersive experiences and customization

Handheld was excluded due to limited variance in platform factors among users.

Variables Included in Analysis

Platforms used to play games

- Platform-specific investment & preferences
  - Average weekly play time
  - 6-month gaming spend
  - Reasons for play on the platform
  - Genres played on the platform
Behavioral Segmentation & Profiles

Take a top-down view of the US market’s six primary gaming audiences to understand their unique interests, needs, and habits. Explore the potential market opportunities and limitations that each audience represents.

Included in the full report:

- Segment comparisons across demographics, gaming investment & platform use
- Segment deep-dive profiles that explore:
  - Demographic distribution & representation
  - Device usage, investment & preferences
  - Genre preferences (by platform) & gaming interests / motivations
  - Engagement with games outside of play - Esports, watching games online
  - Gaming’s role in entertainment - share of time & wallet
Examine the distinct needs and interests that drive play on Mobile, PC, Console, and Handheld, and understand the specialized roles that each platform plays in the often diverse gaming ecosystems of US gamers.

Included in the full report:

- Deep-dive profiles for Mobile, PC, Console & Handheld that explore:
  - Demographic distribution of users
  - Cross-platform play & investment
  - Reasons for play on platform
  - Genre preferences
  - Engagement with games outside of play - Esports, watching games online
  - Gaming's role in entertainment - share of time & spend
  - Key trends, use-cases and limitations for the platform
Demographic Audience Profiles

Investigate how gamers' habits and interests differ as function of gender and age to better understand how to appeal to the diverse US market. Examine patterns in device usage and play habits to understand how engagement is likely to change over time and stage-of-life.

Included in the full report:

- **Overviews of gamers at key life-stages** -
  - Children (ages 2 to 12)
  - Teens & Young Adults (ages 13 – 24)
  - Mid-Adults (ages 25 to 44)
  - Later Adults (45+)

- **Profiles of gender/age segments within each life-stage:**
  - Platform usage, investment & genre preferences
  - Behavioral segments
  - Engagement with games outside of play – Esports, watching games online
  - Gaming’s share of entertainment time & spend

Gender / age segment profiles separately look at male & female gamers within the age groups: Kids (2 to 5, 6 to 9, 10 to 12), Teens (13 to 17), Young Adults (18 to 24), Mid-Adults (25 to 34, 35 to 44), Later adults (45 to 54, 55+).
Methodology & About EEDAR

Research Methodology

Electronic Entertainment Design and Research (EEDAR) gathers its information from a variety of sources. EEDAR goes to great lengths to verify the accuracy of its information, as detailed below.

Where information is publicly available from an authoritative source, such as the issuer or the responsible industry agency, that data is used as authoritative. All authoritative information is then double checked by an EEDAR researcher through direct observation or by cross referencing the data with other authoritative sources. Where possible, the data that is visible to the consumer is used: this includes information printed on the retail boxed product or displayed on the manufacturer website. When discrepancies arise between authoritative sources, additional sources are checked until a clear consensus emerges.

Where information is not publicly available, EEDAR’s internal staff performs directed studies to gather the appropriate data. Our researchers work using custom-built data collection and analysis applications. Each researched fact has an objective observation system which ensures that researcher bias is eliminated. Our data research is performed by multiple researchers simultaneously to ensure that individual facts are cross-checked before being input into the classification system established for that fact. Once information has been entered in the EEDAR Games Database, quality assurance staff reviews the data using boundary analysis tools to identify errors and pinpoint difficulties in the classification systems. Our quality assurance team maintains rigorous performance metrics and ensures that each report is validated to the highest quality standards.

EEDAR attempts to use standard industry vernacular and information classification whenever possible. Where industry standard vernacular or classification structures are not available, EEDAR uses its own vernacular and/or classification systems. This would occur in areas where no industry recognized authoritative body exists, or in areas where multiple authoritative sources use different classification systems. All of the classifications systems created for these reports by EEDAR researchers are detailed in the appendix sections of EEDAR documents. All data from sources other than the EEDAR Games Database are clearly cited.

About EEDAR

Founded in 2006 by video game industry veterans, EEDAR is the largest specialty video game research firm in the world.

Leveraging a proprietary database of over 165 million internally researched data points from more than 125,000 physical and digital video game products, EEDAR is the sole provider of end-to-end integrated data analysis solutions that allow for the examination of every factor influencing the success of past, present, and future video game titles.

EEDAR’s flagship product is GamePulse®, a web-based market intelligence platform that surfaces sales, marketing, and video game metadata in an intuitive and flexible way. EEDAR also offers sales forecasting, data feeds, and a variety of custom research services through its internal team of video game analysts.

In October 2016, EEDAR was acquired by NPD Group, combining their years of games industry expertise with the most trusted name in retail data and consumer analysis.

Visit www.eedar.com for more information on EEDAR’s products and services.