Key Insights from:
Newzoo's Gamer Motivation Study

WHAT REALLY MOTIVATES GAMERS' BEHAVIOR?

Key insights from our first-ever Gamer Motivation Study

After the successful launch of Newzoo's Gamer Segmentation in April 2019, we set out to answer one of our clients' recurring questions: What really motivates gamers when it comes to their game-related behavior? And what drives their playing, viewing, and owning decisions?

To discover the answers to these important questions, we carried out our first-ever Gamer Motivation Study in the world's top gaming markets, the U.S. and China. We also explored the motivations of the different personas in Newzoo's Gamer Segmentation™.

The full study offers an in-depth report for each country, as well as unlimited access to the accompanying data in our Consumer Insights Dashboard.

In this report, we'll share some high-level findings from the main study, including motivations behind viewing and gaming behavior in both markets, how motivations differ per persona, and much more.

As you'll find out, gamers in these two very different markets have different motivations and drivers. Of course, there are plenty of similarities between the two markets as well; for example, getting value for money is at the core of spending decisions in both the U.S. and China. However, value can mean different things for gamers in each of these markets.

Needless to say, all this has major implications for any publisher or brand looking to target and satisfy game enthusiasts in the U.S. and China.

100+

variables used to uncover what motivates gamers in the U.S. and China

Sander Bosman
VP Research

FUN FACTS: GAMERS, VIEWERS, AND OWNERS | U.S.

Gaming breaks down gender barriers and helps players escape from everyday life

20% of U.S. gamers **play more** video games now than they did in the past three years.

48% of U.S. gamers play games **to escape from everyday life**. Women in the U.S. are more likely to play games to fill time and if the game is easy to pick up.

40% of game content viewers in the U.S. enjoy **eating snacks like chips, cookies, and chocolate while they watch gaming content**. Soda is the second most popular thing to consume (30%).

24% Of viewers in the U.S. choose to **watch a gaming video or stream based on the host or streamer**. However, the **specific game that's being played has the biggest influence** on choice of stream to watch.

24% of gamers in the U.S. **choose a new game based on it being from a genre that they like** to play, making **genre the #1 influence** on game choice.

35% of U.S. **console players buy the newest games as soon as they're available**, making them the quickest game adopters alongside PC gamers (33%), with mobile gamers slightly slower (28%).

FUN FACTS: GAMERS, VIEWERS, AND OWNERS | CHINA

Gaming breaks down gender barriers and helps players to fill time

74%

of respondents in China **watch live-streamed gaming video** content. **Douyu** and **Huya** are the most used streaming video platforms in China.

34%

of gamers in China **play more** video games more now than they did in the past three years.

57%

of those who watch gaming video content **donate money to video gaming channels /esports broadcasters** at least once a month. Women (63%) are more likely to donate money than men are (52%).

71%

of gamers **have spent money on games** in the past six months. Of those who have spent, 68% say they are more likely to spend money on games if it's **a limited-time offer**.

52%

of viewers in China say that **eating snacks (e.g., chips, cookies, chocolates) enhances their viewing experience**. Energy drinks (28%) are the second-most popular thing to consume, followed closely by health-conscious food.

84%

of players in China **have spent money on gaming hardware in the past three years.** Of those who have spent, 53% buy hardware to improve their gaming experience.
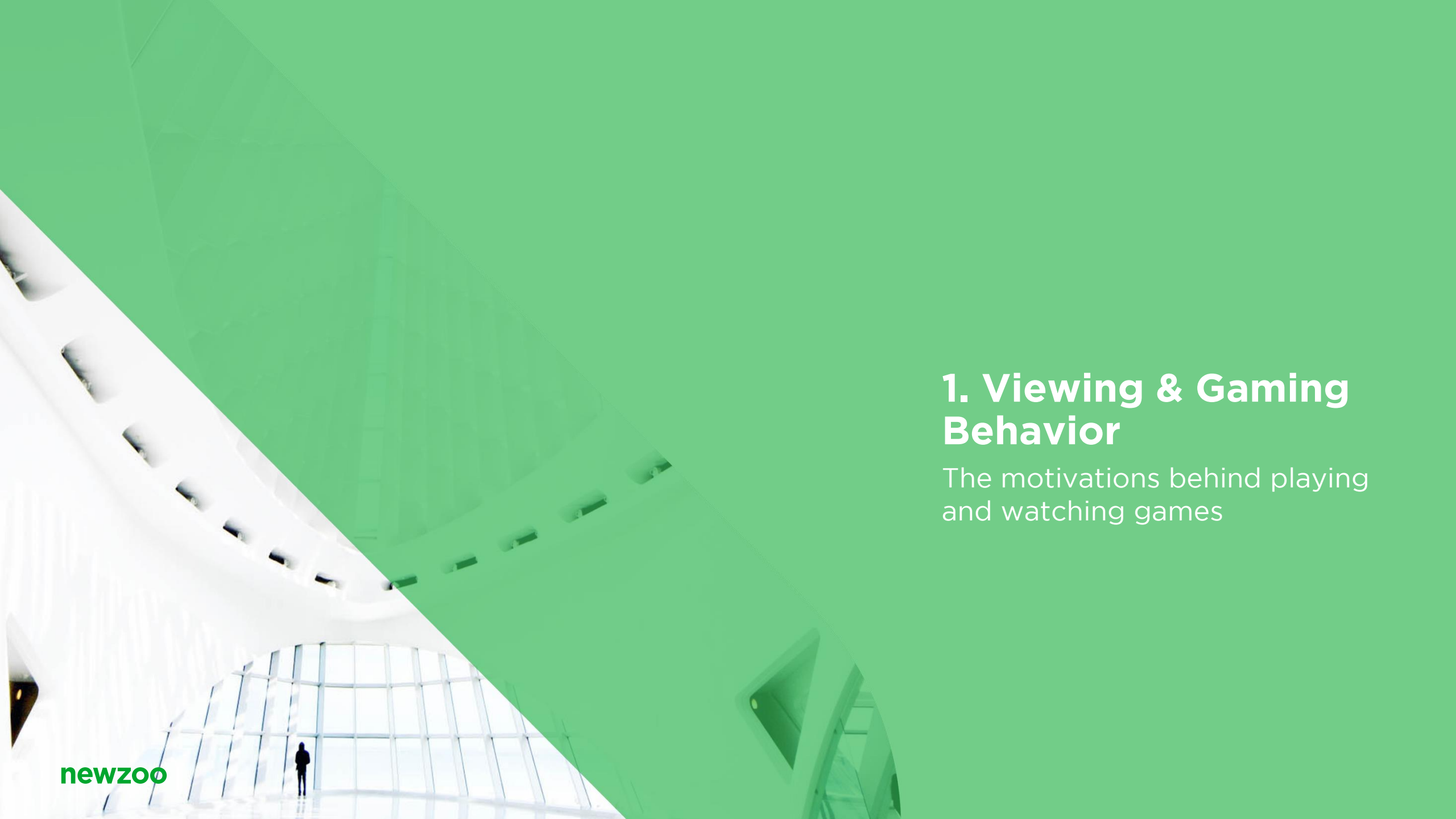
1. Viewing & Gaming Behavior

The motivations behind playing and watching games

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ESCAPISM AND FILLING TIME DRIVE GAMEPLAY IN THE U.S.

Games involving competition, exploration, and strategy appeal more directly to gamers in China

TOP 5 MOTIVATIONS TO PLAY GAMES | TOTAL GAMERS

	United States			China	
#1	**Escaping from everyday life**	**48%**	#1	To fill time	37%
#2	**To fill time**	**47%**	#2	**Completing objectives**	**36%**
#3	Completing objectives	28%	#3	**Exploring worlds/storylines**	**35%**
#4	That the game is easy to pick up	27%	#4	**Strategic aspects that challenge you**	**32%**
#5	Exploring worlds/storylines	26%	#5	Socializing with friends	27%

Motivations to play differ a lot between China and the U.S., partially due to the **different style of games and play experienced across the Western and Eastern markets**.

These differences are mirrored when comparing genders across countries.

Motivations to play are generally similar among men and women within a country, especially in China. However, some differences can help understand how a game might appeal differently across genders.

Casual motivations are more popular among women in the U.S.

To fill time — 42% / 52%
The game is easy to pick up & play — 23% / 32%
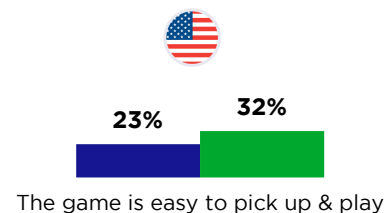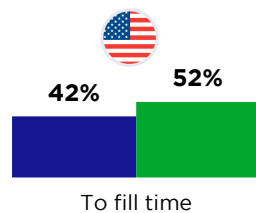
Exploring storylines is more popular among men than women in both the U.S. and China.

Exploring worlds/storylines (U.S.) — 30% / 22%
Exploring worlds/storylines (China) — 39% / 31%
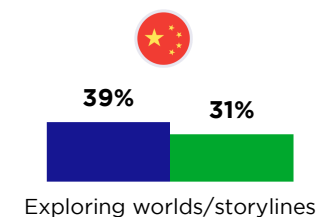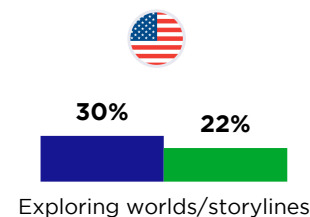
TOP MOTIVATORS: LEARNING AND HIGH-LEVEL GAMEPLAY

U.S. viewers also watch as secondary entertainment, while Chinese viewers use viewing to stay up to date

MOTIVATIONS TO WATCH GAMING VIDEO CONTENT | GAME CONTENT VIEWERS

		U.S.	
#1	**Learning from other players**	**34%**
#2	**Getting help with a game**	**33%**
#3	Seeing high-level gameplay or skills	33%
#4	Staying up to date	32%
#5	"Background entertainment"	32%

		China	
#1	**Seeing high-level gameplay or skills**	**58%**
#2	**Staying up to date**	**46%**
#3	Learning from other players	35%
#4	The personality of streamers	30%
#5	Learning about others' opinions	27%

Compared to U.S. gamers, **gamers in China are more likely to watch games to see high-level gameplay** or skills and to **stay up to date** on new or popular games.

On the other hand, **U.S. gamers mainly want to learn to improve their own play**.

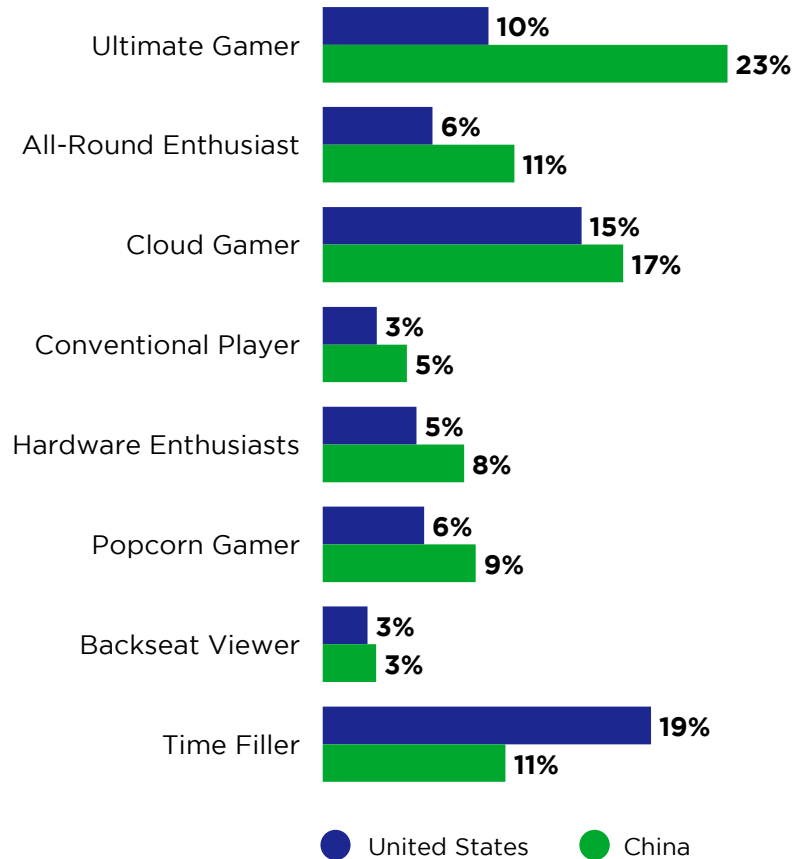**Men in both the U.S. and China are more likely to watch streams to see high-level gameplay and skills.**

U.S.

35%   29%

Seeing high-level gameplay or skills

China

60%   55%

Seeing high-level gameplay or skills
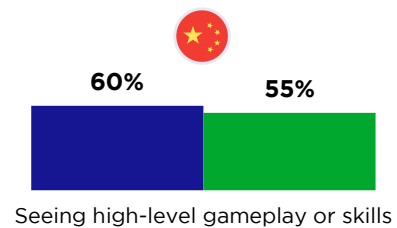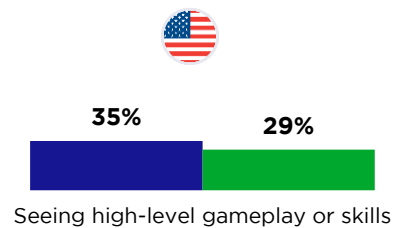
2. Motivations per Persona

Based on Newzoo's Gamer Segmentation™

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PLAYERS IN THE U.S. SKEW MORE TOWARD TIME FILLERS

The different gaming landscape in China means its players skew more towards Ultimate Gamers

NEWZOO'S GAMER SEGMENTATION SPLIT | U.S. VS CHINA

Segment	United States	China
Ultimate Gamer	10%	23%
All-Round Enthusiast	6%	11%
Cloud Gamer	15%	17%
Conventional Player	3%	5%
Hardware Enthusiasts	5%	8%
Popcorn Gamer	6%	9%
Backseat Viewer	3%	3%
Time Filler	19%	11%

● United States ● China

"What first comes to mind when you think about video games?"

THE ULTIMATE GAMER
"The best way to channel my energy and be competitive at the same time. A great source of entertainment."

THE ALL-ROUND ENTHUSIAST
"I love video games and being able to play online, especially on my phone. Like Fortnite."

THE CLOUD GAMER
"Games are great! They're fun and entertaining in all forms."

THE CONVENTIONAL PLAYER
"It's fun to play games, and there are many available options. There are also interesting new game systems to play on."

THE HARDWARE ENTHUSIAST
"When thinking about video games I think about video game systems like PlayStation, Xbox one, and the games they release."

THE POPCORN GAMER
"They are a fun way to relax and take a few moments for yourself. I like the visual aspects like the colors, and how they can look real."

THE BACKSEAT VIEWER
"Video games are fun but time-consuming. They're good for the younger generation though."
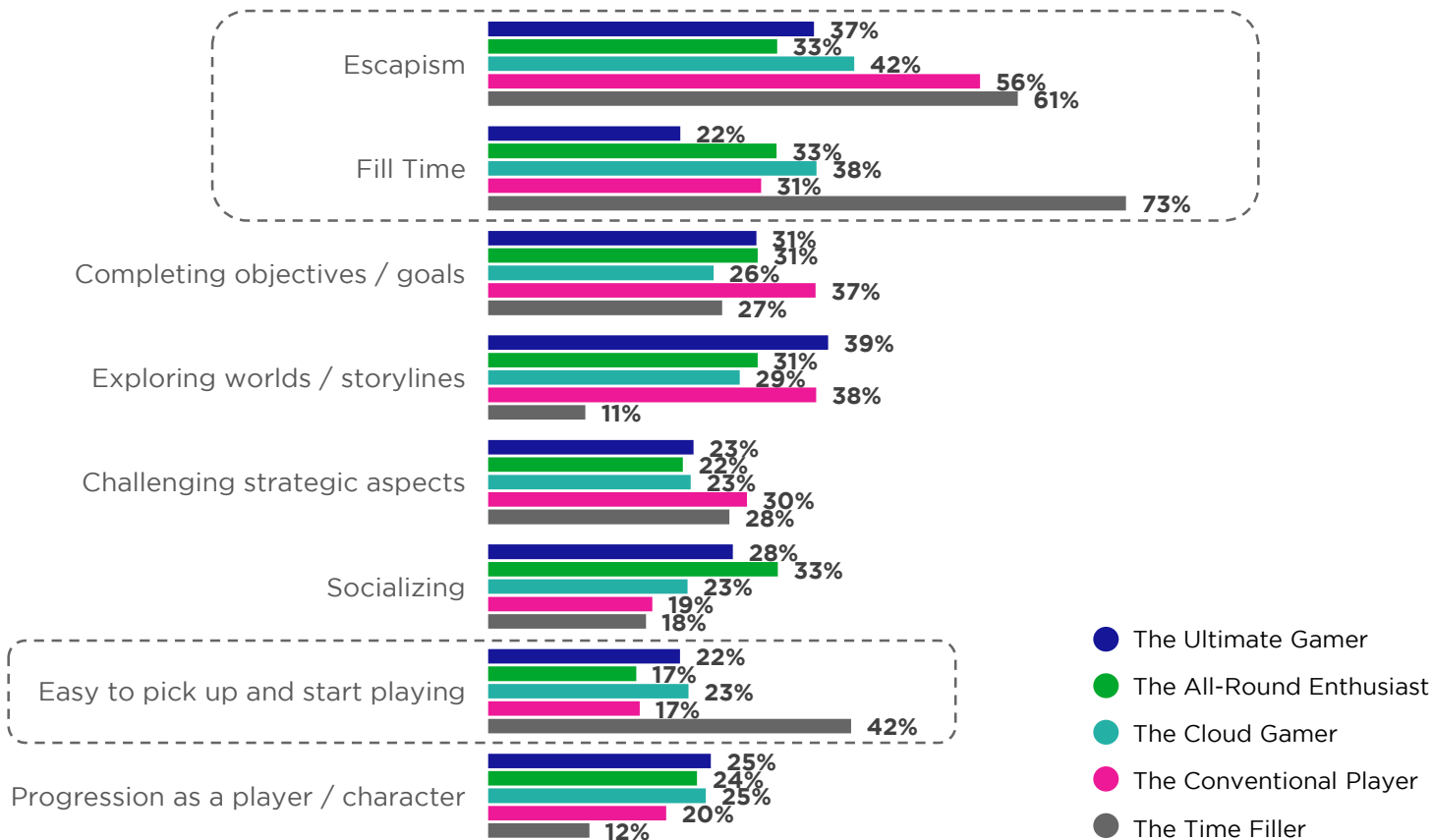
THE TIME FILLER
"They're okay. I mostly think of mobile games as a way to pass time when waiting."

ESCAPISM IS A KEY MOTIVATOR FOR ALL PERSONAS

But other motivations vary depending on the type of player being targeted

A SELECTION OF KEY MOTIVATIONS TO PLAY GAMES | U.S.

Motivation	The Ultimate Gamer	The All-Round Enthusiast	The Cloud Gamer	The Conventional Player	The Time Filler
Escapism	37%	33%	42%	56%	61%
Fill Time	22%	33%	38%	31%	73%
Completing objectives / goals	31%	31%	26%	37%	27%
Exploring worlds / storylines	39%	31%	29%	38%	11%
Challenging strategic aspects	23%	22%	23%	30%	28%
Socializing	28%	33%	23%	19%	18%
Easy to pick up and start playing	22%	17%	23%	17%	42%
Progression as a player / character	25%	24%	25%	20%	12%

Legend:
- ● The Ultimate Gamer
- ● The All-Round Enthusiast
- ● The Cloud Gamer
- ● The Conventional Player
- ● The Time Filler

Time Fillers in the U.S. lean toward casual mobile games that can be played whenever and wherever.

Draw this audience to your games by **making the game environment fun and immersive** (escapism) and **ensuring low barriers to game entry,** so they can easily pick up the game and start playing in their free time.

Games that want to entice the more engaged and active player personas should look to **exploration, completionism, and competitive elements** of gameplay, as well as **social opportunities** that motivate these gamers to play.

The Ultimate Gamer and the Conventional Player are mostly looking for **exploration** when it comes to gaming. The Conventional Player is also motivated by **completing objectives** and **challenging strategic elements** in games.
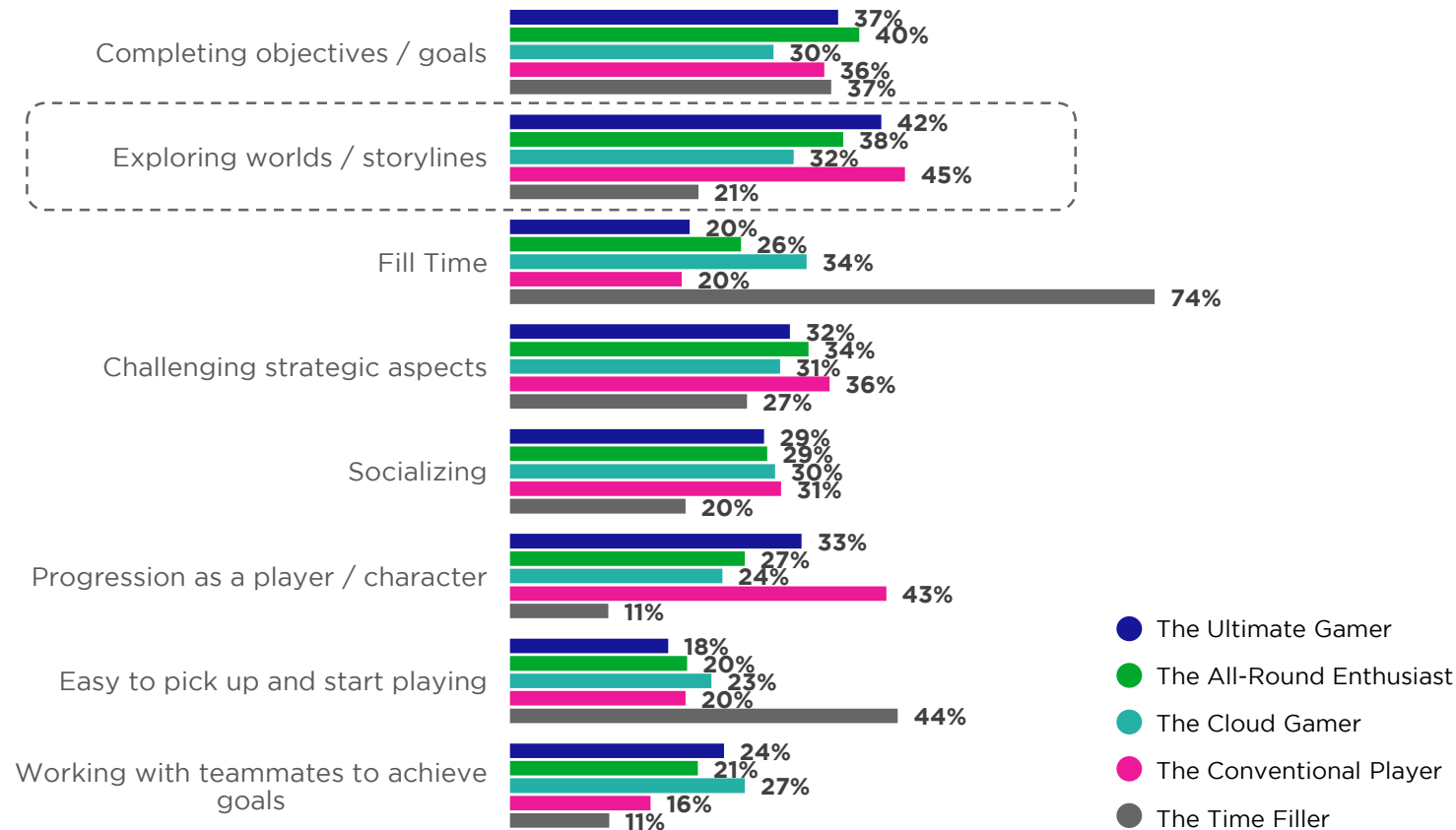
For the All-Round Enthusiast, **socializing is one of the most important motivations**, on par with escapism and filling time. It is also an important aspect for the Ultimate Gamer. This shows the big role gaming plays in this type of player's (social) life and the importance of offering communities for these gamers.

EXPLORING STORYLINE MOTIVATES NON-TIME-FILLERS

But other motivations vary depending on the type of player being targeted

A SELECTION OF KEY MOTIVATIONS TO PLAY GAMES | CHINA

Completing objectives / goals
- 37%
- 40%
- 30%
- 36%
- 37%

Exploring worlds / storylines
- 42%
- 38%
- 32%
- 45%
- 21%

Fill Time
- 20%
- 26%
- 34%
- 20%
- 74%

Challenging strategic aspects
- 32%
- 34%
- 31%
- 36%
- 27%

Socializing
- 29%
- 29%
- 30%
- 31%
- 20%

Progression as a player / character
- 33%
- 27%
- 24%
- 43%
- 11%

Easy to pick up and start playing
- 18%
- 20%
- 23%
- 20%
- 44%

Working with teammates to achieve goals
- 24%
- 21%
- 27%
- 16%
- 11%

Legend:
- ● The Ultimate Gamer
- ● The All-Round Enthusiast
- ● The Cloud Gamer
- ● The Conventional Player
- ● The Time Filler

Time Fillers in China lean toward casual mobile games that can be played whenever and wherever.

Draw this audience to your games by **ensuring low barriers to game entry,** so they can easily pick up the game and start playing in their free time.

Interestingly, **completing objectives appeals just as much to Time Fillers as it does to other more engaged player personas**, so even the more casual games should try to include completionism elements to keep their players engaged.

Those who aren't Time Fillers enjoy games that have **stories and worlds that they are drawn into and get lost in**. These are usually players who spend more time on gaming, and therefore can develop a deeper relationship with the events in the game.

The combination of strong story, progression, and engaging objectives particularly appeals to Conventional Players and Ultimate Gamers. These two factors could create synergy with a strong storyline to help players stay engaged and invested in the games they are playing.

3. Reactivating the Lapsed Gamer

Insights into a new persona

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THE LAPSED GAMER

The lapsed gamer currently neither plays video games nor watches video game content. These are people who played games in the past, with around a quarter of them actually intending to play video games again in the next six months. For those who intend to start playing again, a lack of time is the main reason provided that they don't currently play. Those who don't intend to start playing again would rather spend their time on other activities.

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WHY IS RE-ACTIVATING THE LAPSED GAMER IMPORTANT?

Gaming has been extremely successful in gaining more engagement hours in the past 15 years through major innovations every five years, but one of the only ways to double the amount of hours played (and, indirectly, money) is to have people enjoy a game IP over their full lifetime. The array of different ways you can now enjoy game IP already caters to this (watching content, buying merchandise, etc.), with the games business constantly finding new ways to stop gamers from lapsing.

Now that the games business is successfully keeping people engaged when they grow older, the question is if it can also draw people back after they've lapsed. One way of getting them back is having them passively enjoy (viewing or merch) the IP they used to play. Another way is offering more casual game experiences that combine old IP with game formats that fit this older audience. This goes hand in hand with new, low-threshold ways of playing a game, such as instant games in messengers and being subscribed to a cloud gaming subscription service.

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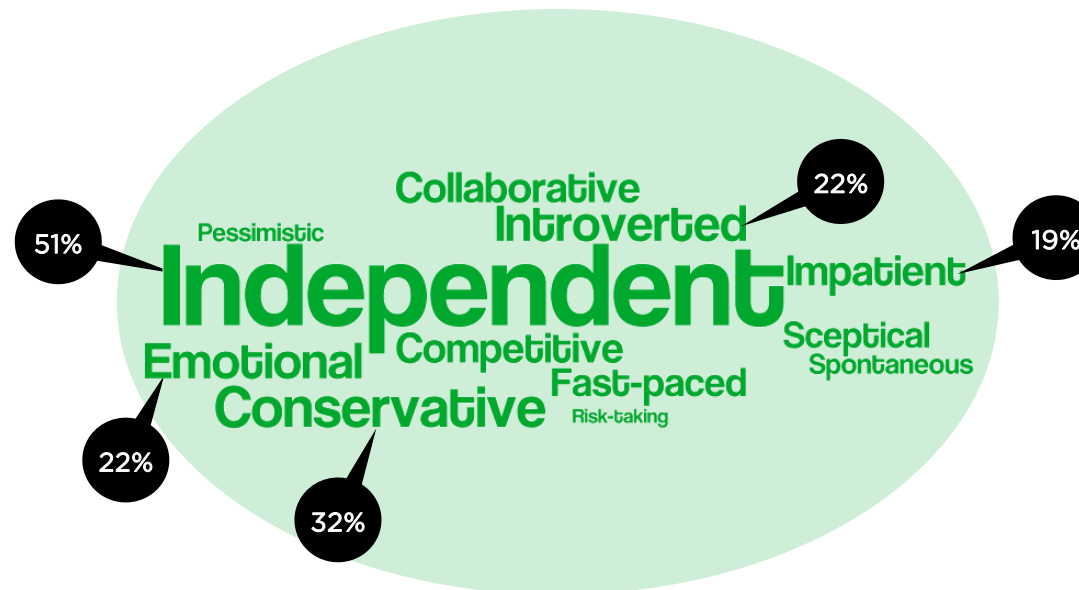# LAPSED GAMERS: LESS COMPETITIVE, LESS RISK-TAKING

Differences in personality traits give insights into how lapsed gamers might differ from current gamers
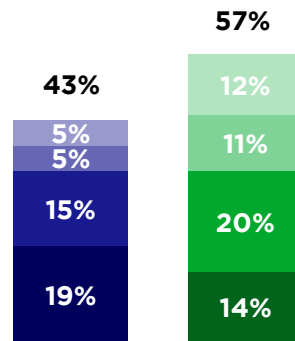
TOTAL GAMERS

LAPSED GAMER

The Lapsed Gamer is more conservative and less competitive, collaborative, or risk-taking than the average gamer.

THE LAPSED GAMER SKEWS MUCH OLDER IN THE U.S.
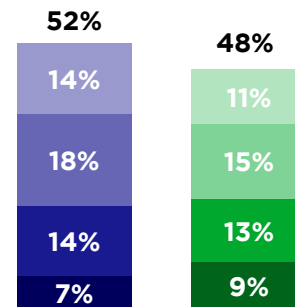
They fall outside the typical gamer target group

LAPSED GAMER

43%

5%	
5%	
15%	
19%	

57%

12%
11%
20%
14%

Avg Age:
41
years old

TOTAL GAMERS

52%

14%
18%
14%
7%

48%

11%
15%
13%
9%

Avg Age:
33
years old

MALE   **FEMALE**

MALE	FEMALE
● 10-20	● 10-20
● 21-35	● 21-35
● 36-50	● 36-50
● 51-65	● 51-65

The Lapsed Gamer is more likely to be a woman and skews older than the average gamer. **This group falls outside of the typical gamer target group but should not necessarily be forgotten about.**

THE LAPSED GAMER IS SLIGHTLY OLDER IN CHINA

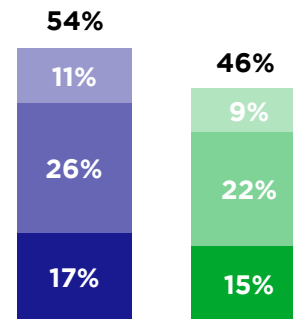They are slightly outside the typical gamer target group in China

LAPSED GAMER

55%
- 9%
- 14%
- 32%

45%
- 7%
- 18%
- 21%
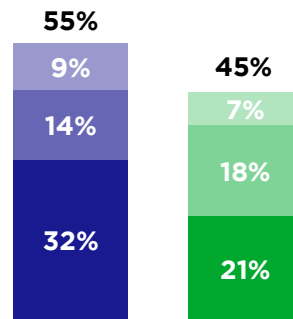
Avg Age:

33
years old

TOTAL GAMERS

54%
- 11%
- 26%
- 17%

46%
- 9%
- 22%
- 15%

Avg Age:

30
years old

MALE   **FEMALE**

- 10-20   10-20
- 21-35   21-35
- 36-50   36-50

The Lapsed Gamer **falls slightly outside of the typical gamer target group but should not necessarily be forgotten about.**

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Lapsed Gamers: people who have played games in the past but no longer play games or view content

GET ACCESS TO THE FULL STUDY

Newzoo's Gamer Motivation Study

FOCUS COUNTRIES

2,000+ respondents per country

DELIVERY

Online data access, a summary report, and country-specific reports

TOPICS INCLUDE:

- Reasons to, or not to, watch gaming video content, play games, or buy gaming hardware

- Emotions experienced when engaging in various game-related behaviors

- Effect of consumption on the experience of watching video gaming content, as well as player performance when playing games

- What influences the watching of gaming video content, playing games, and buying gaming hardware

PERSONAS

THE ULTIMATE GAMER

THE CONVENTIONAL PLAYER

THE POPCORN GAMER

THE HARDWARE ENTHUSIAST

THE ALL-ROUND ENTHUSIAST

THE CLOUD GAMER

THE BACKSEAT VIEWER

THE TIME FILLER

THE LAPSED GAMER

"When I started working, my spare time became more limited and other hobbies got prioritized over gaming"
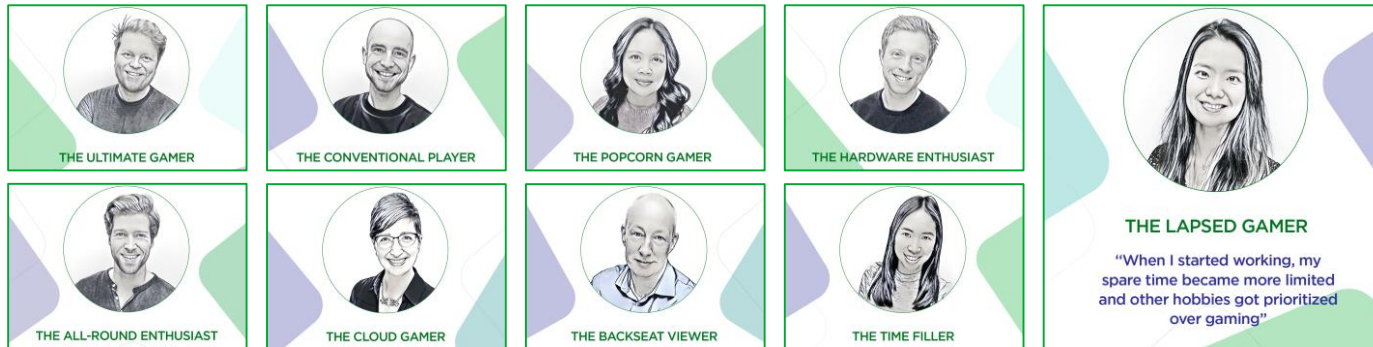
POWERED BY

NEWZOO'S GLOBAL GAMING & ESPORTS PANEL™

14M+ Direct access to over fourteen million game enthusiasts

NEWZOO'S GAMER SEGMENTATION™

9 Unique personas based on viewing, gaming, and owning behavior. Includes our newest persona, the Lapsed Gamer

INVESTMENT

1 Country:

$9,000/YR

2 Countries:

$15,000/YR

Includes direct access to all data, a summary report, (a) country report(s) for each purchased country, and analysis support

Methodology
& Appendix

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PROJECT METHODOLOGY (I)

Research objectives and topics

OBJECTIVES

After the successful launch of Newzoo's Gamer Segmentation April of this year, the aim of this research project is to answer one of our clients' recurring questions, which is to get a better understanding of true motivations behind the different personas in the way they engage with video games – through playing, viewing, and owning. This study explores the reasons to why the different personas play and watch games, own hardware and explores their personality traits.

TOPICS

Topics include but are not limited to:
- **Demographics** (e.g., country, gender, age, work situation, and home situation)
- **Game behavior** (e.g., play frequency per platform, time spent per week per platform, emotions felt when playing games, consumption that enhances gaming experience/performance, money spent on games and reason why)
- **Viewing behavior** (e.g., gaming video content consumption, esports awareness, changes in viewing behavior over time, influences on watching gaming video content)
- **Gaming hardware & peripherals** (e.g., money spent on gaming hardware, gaming hardware adoption rate, reasons to buy gaming hardware)

PROJECT METHODOLOGY (II)

Research scope

SCOPE

Respondents: 4,110 respondents recruited.

Target group: Online population aged 10-65 in the U.S., and online population aged 10-50 in China.

Computer Assisted Web Interviewing (CAWI):
Sampled in the United States and China. Spread over 16 days, including two weekends for a balanced sample (October 29th – November 13th 2019). In China respondents were sampled in Tier 1 & Tier 2 cities only.

Questionnaire length: Average length per respondent is 12 minutes.

Sample composition:

	🇺🇸	🇨🇳
Male	1,024	1,056
Female	1,030	1,000
Total	**2,054**	**2,056**

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METHODOLOGY NEWZOO'S GAMER SEGMENTATION™

Traditional gamer segmentations have become less and less representative of the market and are no longer as useful to our clients, especially those not familiar with the games business and seeking opportunities to enter the market. For these reasons, Newzoo developed an alternative, all-encompassing approach.

The process began at the end of 2017 with extensive analysis of our consumer research, which represents 30 markets and more than 60,000 respondents, and includes insights into 200+ key variables.

It was clear that three factors would be essential in creating consumer segmentations that represent not just gaming behavior but also the enthusiasm surrounding gaming: (i) play behavior, (ii) game video content viewership, and (iii) gaming hardware ownership. We used these key factors to classify consumer behavior, interest, and attitude toward gaming in a way that provides an overview of the modern gaming market.

We measured these factors with multiple underlying variables on which respondents are scored. Based on these scores, we performed a cluster analysis, and, after multiple iterations, we identified eight unique, actionable segments/personas. Each persona is of sufficient size and shows significant differences in terms of both behavior and demographic profile.

Following extensive internal and external testing, we launched Newzoo's Gamer Segmentation™ and Personas in April 2019. These personas can be integrated into any custom research study, by either pre-selecting a set of personas that are of interest from our Global Gaming and Esports Panel (more information here), or by integrating our persona segmentation questions and typing tool within the research. This enables our clients to understand, profile, and reach the key personas they want to target with their products/services.

SCOPE

Total (urban) online population in the following 30 markets:
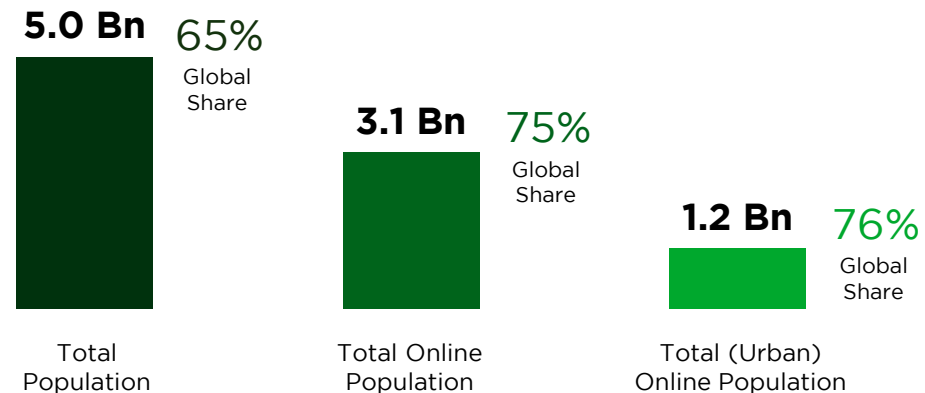
NAM: United States, Canada

EMEA: United Kingdom, Germany, France, Spain, Italy, Russia, Poland, Netherlands, Belgium, Sweden, Turkey, Saudi Arabia

LATAM: Mexico, Brazil, Argentina

APAC: Australia, New Zealand, China, Japan, South Korea, Thailand, Taiwan, Indonesia, Vietnam, Malaysia, Philippines, Singapore, India.
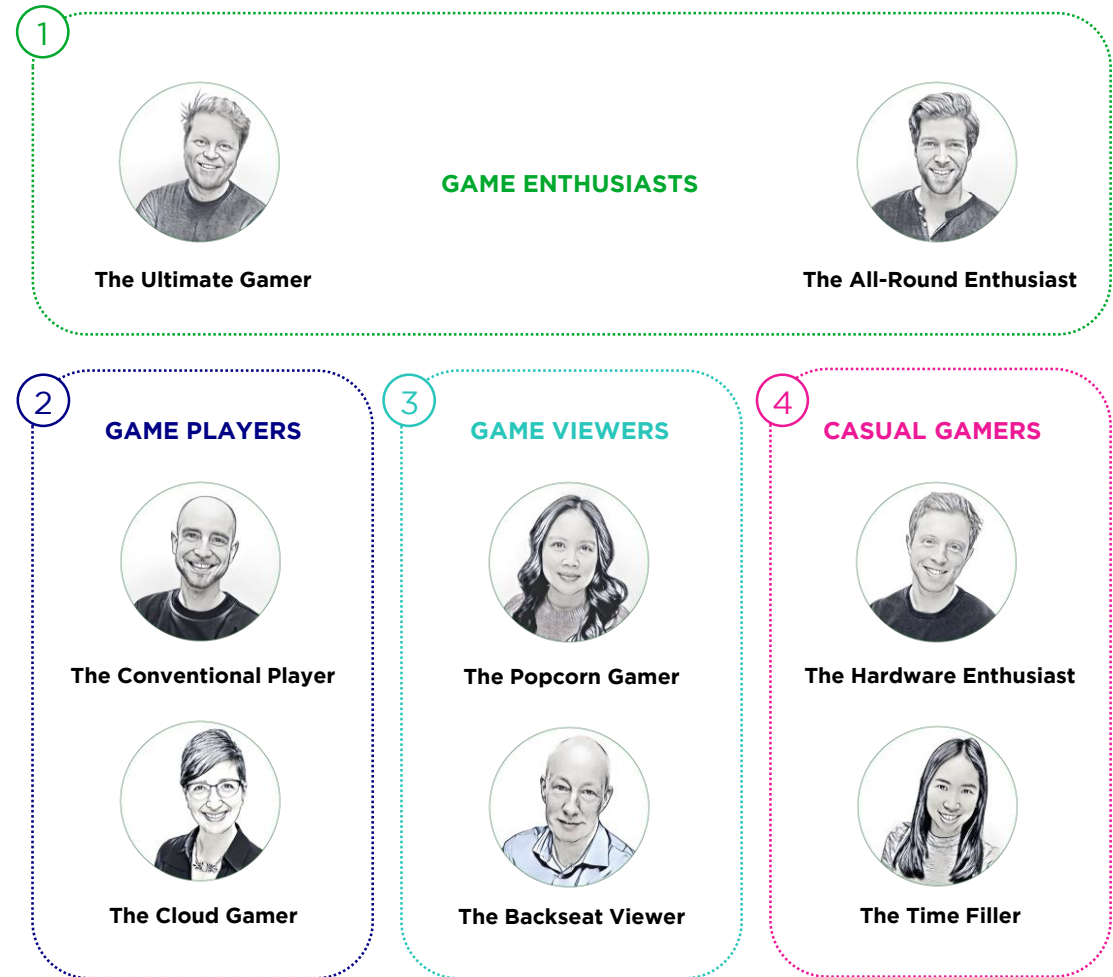
POPULATION GROUPS THAT WE COVER ACROSS 30 MARKETS

5.0 Bn   65% Global Share

3.1 Bn   75% Global Share

1.2 Bn   76% Global Share

Total Population

Total Online Population

Total (Urban) Online Population

GROUPING NEWZOO'S GAME ENTHUSIAST PERSONAS

Game Enthusiasts, Game Players, Game Viewers, and Casual Gamers

- The eight game enthusiast personas each represent a unique type of user in the market.

- Each persona has its own way of engaging with games related content and products.

- All personas have a distinct profile that differs from the others.

- Personas are built up from a combination of engagement preferences across playing, viewing, and owning using the previously introduced segments.

- The eight personas represent everyone within the gaming enthusiasts population. The personas are mutually exclusive, meaning that a person can only belong to one persona group and there is no overlap between the persona groups.

- For those interested in more sizeable groups/less segments we provide an alternative grouping of 4 main segments, combining personas that are most similar in terms of behavior, consisting out of Game Enthusiasts, Game Viewers, Casual Gamers, and Game Players.

1 — GAME ENTHUSIASTS

The Ultimate Gamer

The All-Round Enthusiast

2 — GAME PLAYERS

The Conventional Player

The Cloud Gamer

3 — GAME VIEWERS

The Popcorn Gamer

The Backseat Viewer

4 — CASUAL GAMERS

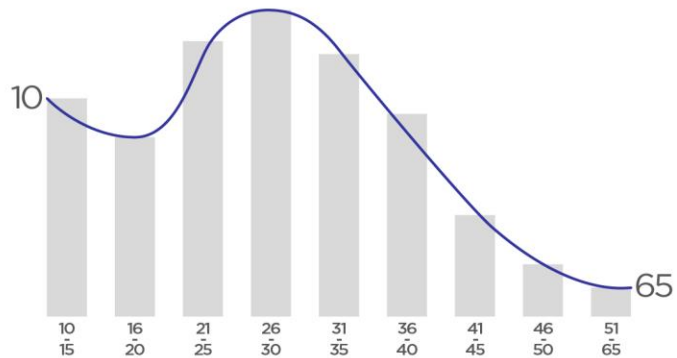**The Hardware Enthusiast**

The Time Filler

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The Ultimate Gamer lives and breathes games, across all spectrums of the market: playing, owning, and viewing. A regular watcher of game video content, this persona loves knowing about the latest and greatest in games and esports. With plenty of disposable income available for their favorite pastime, Ultimate Gamers have both the passion and the funds to invest in the newest hardware and peripherals.
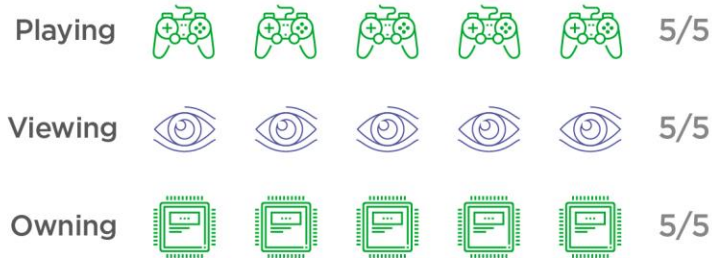
AGE DISTRIBUTION

Average	Median	Mode
28.13 years old	**28** years old	**26-30** years old

10

65

| 10-15 | 16-20 | 21-25 | 26-30 | 31-35 | 36-40 | 41-45 | 46-50 | 51-65 |

13% of gaming enthusiasts

THE ULTIMATE GAMER

"Gaming is in my DNA! There are few things I love more. I spend my free time and money on games."

Playing		5/5
Viewing		5/5
Owning		5/5

newzoo Gamer Segmentation™

HOBBIES

Video games

Computers, electronics, & gadgets

Film/movies

Average Gamer persona

HOME SITUATION

Alone

With my parents

Together or alone, with kids

Together, without kids

Average Gamer persona

GENDER SPLIT

M **65%**
Average gamer persona 54%
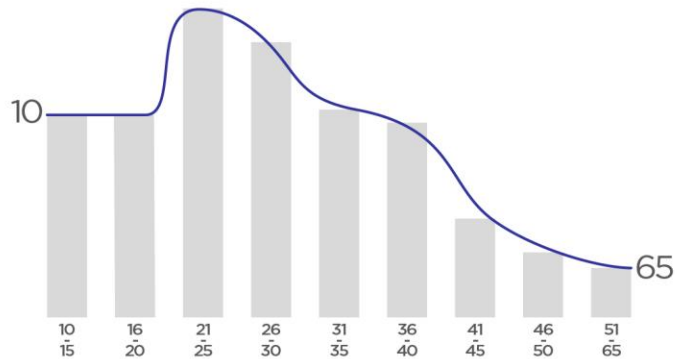
F **35%**
Average gamer persona 46%

25

SUMMARY

The All-Round Enthusiast is an avid gamer who plays for many hours a week. They may not be as dedicated as Ultimate Gamers, but games are still serious business for this persona. They are typically fulltime workers, so paying for the newest titles—as well as hardware—is not an issue. All-Round Enthusiasts enjoy a holistic gaming experience by combining playing games, viewing game content, and owning dedicated gaming hardware.

AGE DISTRIBUTION

Average
28.34
years old

Median
27
years old

Mode
21-25
years old

10

65

| 10 15 | 16 20 | 21 25 | 26 30 | 31 35 | 36 40 | 41 45 | 46 50 | 51 65 |

THE ALL-ROUND ENTHUSIAST

9%
of gaming
enthusiasts

"I am interested in all forms of gaming, from playing to watching and everything in between."

Playing   4/5

Viewing   4/5
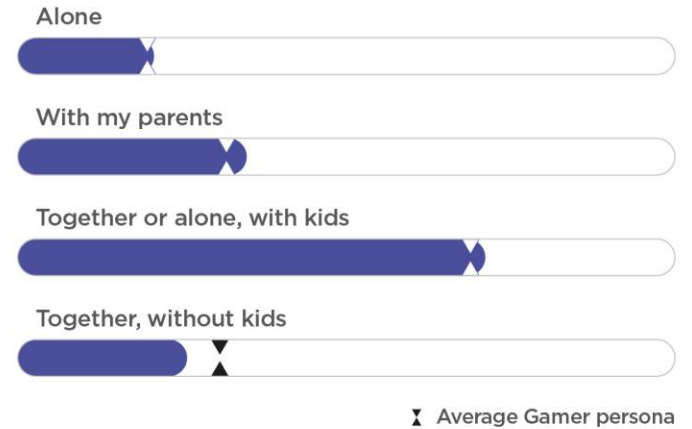
Owning   4/5

newzoo Gamer Segmentation™

HOBBIES

Video games

Film/movies

Music

✕ Average Gamer persona

HOME SITUATION

Alone

With my parents

Together or alone, with kids

Together, without kids

✕ Average Gamer persona

GENDER SPLIT

M
65%
Average gamer persona 54%

F
35%
Average gamer persona 46%

26
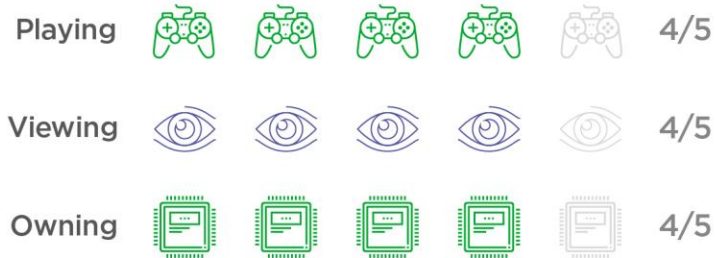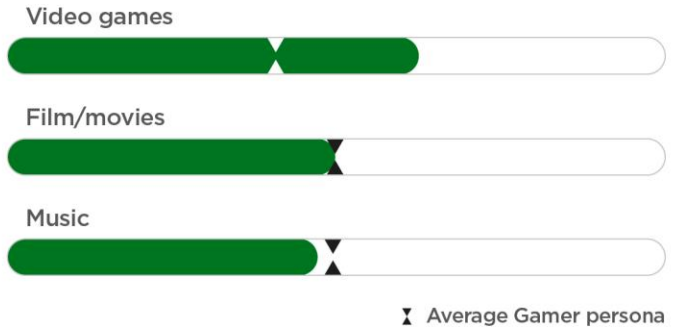
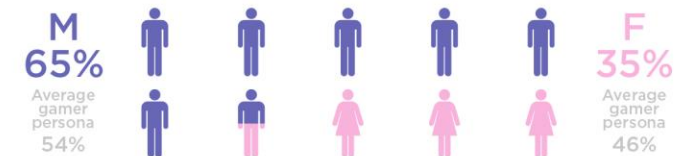## SUMMARY

The Conventional Player resembles the Ultimate Gamer of 10 years ago, before the advent of game video content and the meteoric rise of esports. Watching others play is of little interest to the Conventional Player. Still, they revel in staying up to date with the latest developments and game releases. Nothing will get in the way of this persona fulfilling their gaming needs, so purchasing the newest hardware and peripherals is part of the fun.

AGE DISTRIBUTION
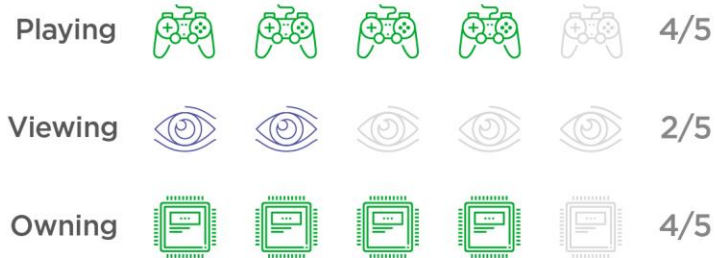
Average 31.93 years old

Median 32 years old

Mode 31-35 years old

10

65

| 10 15 | 16 20 | 21 25 | 26 30 | 31 35 | 36 40 | 41 45 | 46 50 | 51 65 |
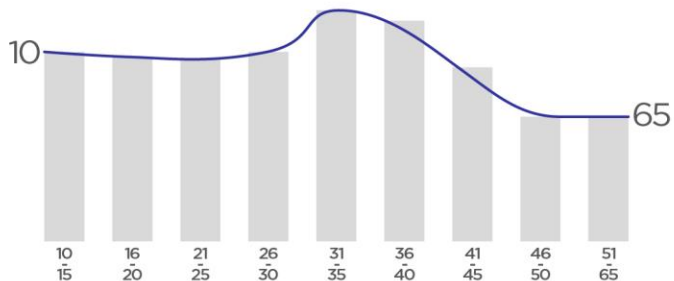
4% of gaming enthusiasts

THE CONVENTIONAL PLAYER

"I do not watch other people play games much. I own plenty of hardware, so I would rather be playing myself."

Playing 4/5

Viewing 2/5

Owning 4/5

newzoo Gamer Segmentation™

HOBBIES

Video games

Film/movies

Music

✕ Average Gamer persona

HOME SITUATION

Alone

With my parents

Together or alone, with kids

Together, without kids

✕ Average Gamer persona

GENDER SPLIT

M **62%** Average gamer persona 54%

F **38%** Average gamer persona 46%

27

SUMMARY

Cloud Gamers care deeply about playing games, but what sets them apart is their hardware indifference. They spend very little money on hardware, with a significant portion of the persona spending nothing at all. They may only buy hardware when necessary, receive it as a gift, or they simply don't buy their hardware with gaming in mind. For this persona, it's all about the software.

AGE DISTRIBUTION

Average 29.56 years old	Median 28 years old	Mode 21-25 years old

10

65

| 10-15 | 16-20 | 21-25 | 26-30 | 31-35 | 36-40 | 41-45 | 46-50 | 51-65 |
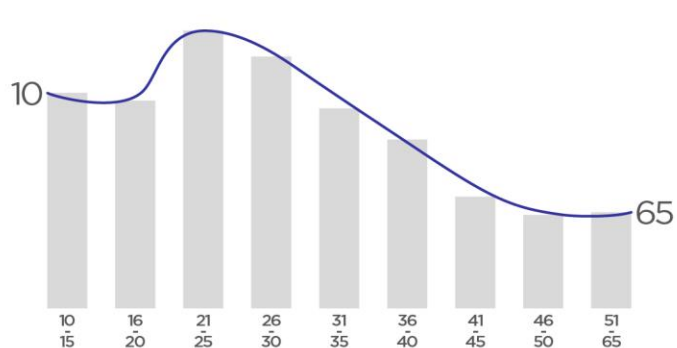
19% of gaming enthusiasts

THE CLOUD GAMER

"I enjoy playing high-quality games, preferably free-to-play or discounted titles. I will only spend on hardware when necessary."

Playing 4/5

Viewing 3/5

Owning 2/5

newzoo Gamer Segmentation™

HOBBIES

Video games

Music

Film/movies

Average Gamer persona

HOME SITUATION

Alone

With my parents

Together or alone, with kids

Together, without kids

Average Gamer persona

GENDER SPLIT

M 59%
Average gamer persona 54%

F 41%
Average gamer persona 46%

SUMMARY

The Hardware Enthusiast is casual about gaming and does not typically dedicate much time to playing and viewing games each week. When the persona does play games, however, hardware is vital. Hardware Enthusiasts cannot turn a blind eye to the hottest new gaming gear, so they spend big on the latest hardware, peripherals, and gaming-related gadgets. And their love of computers, electronics, and gadgets typically extends beyond gaming.
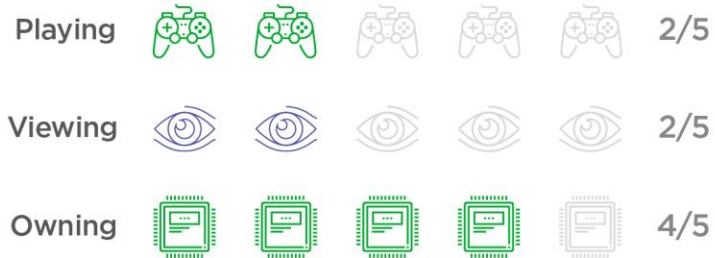
AGE DISTRIBUTION

Average 31.01 years old	Median 30 years old	Mode 10-15 years old

10

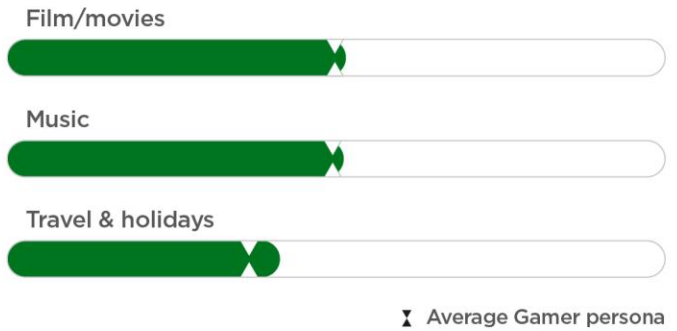| 10 15 | 16 20 | 21 25 | 26 30 | 31 35 | 36 40 | 41 45 | 46 50 | 51 65 |

65

9% of gaming enthusiasts
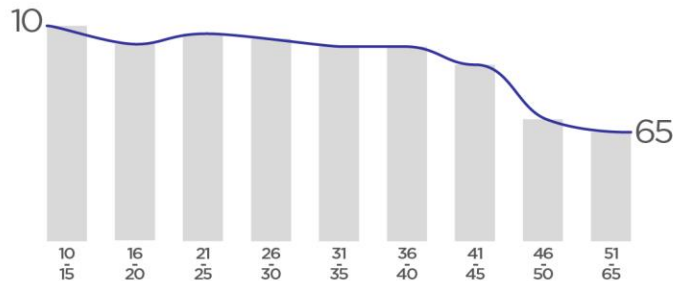
THE HARDWARE ENTHUSIAST

"I am always following the latest hardware news and trends. Whether it's for work or play, I want an optimized experience."
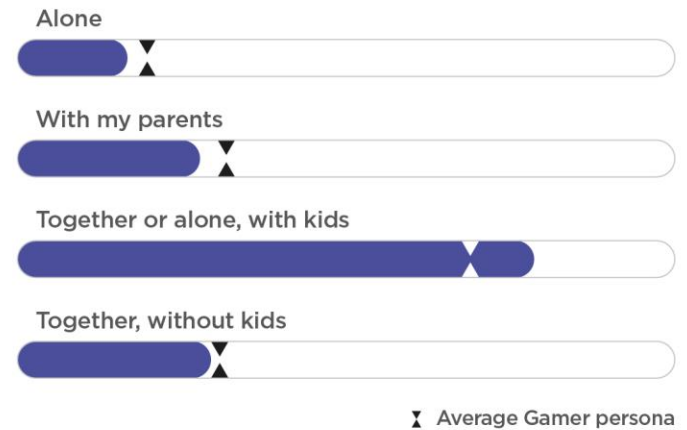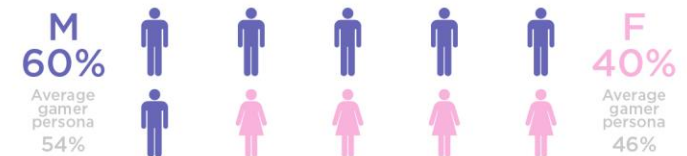
Playing	2/5
Viewing	2/5
Owning	4/5

newzoo Gamer Segmentation™

HOBBIES

Film/movies

Music

Travel & holidays

⚊ Average Gamer persona

HOME SITUATION

Alone

With my parents

Together or alone, with kids

Together, without kids

⚊ Average Gamer persona

GENDER SPLIT

M 60%
Average gamer persona 54%

F 40%
Average gamer persona 46%

SUMMARY

Popcorn Gamers might not devote much time to playing games every week, but that doesn't stop them tuning into Twitch, YouTube, and/or Mixer to watch plenty of game video content and/or esports alone or together with friends. While they do play games casually, they prefer enjoying the industry vicariously through video. In line with their game-viewing behavior, they also spend a lot of time watching television and online videos/TV.

AGE DISTRIBUTION

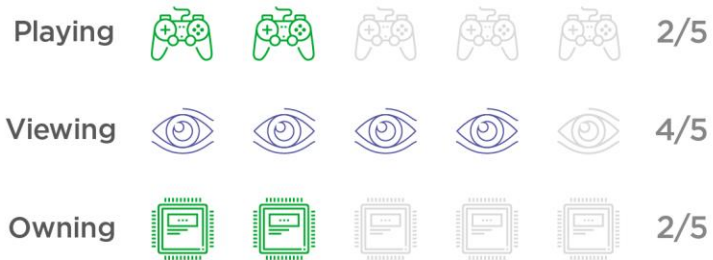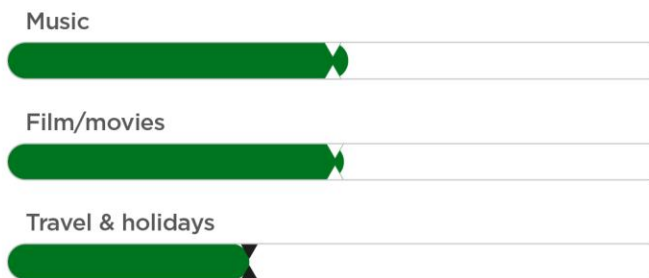| Average 31.13 years old	Median 29 years old	Mode 21-25 years old

10

65

| 10 15 | 16 20 | 21 25 | 26 30 | 31 35 | 36 40 | 41 45 | 46 50 | 51 65 |
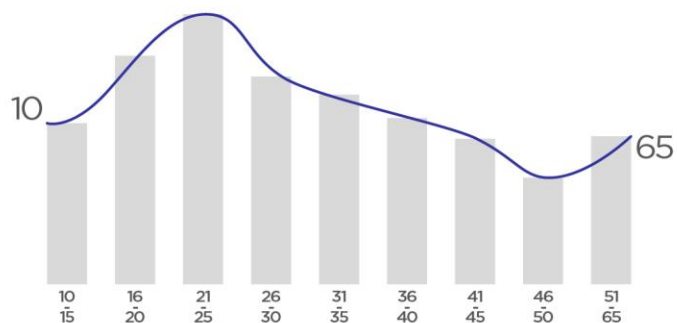
13% of gaming enthusiasts

THE POPCORN GAMER

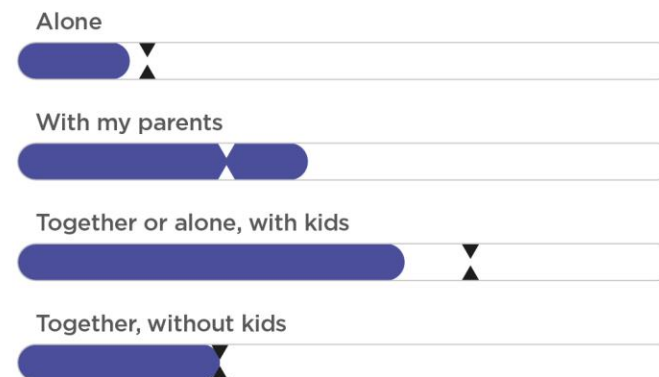"Playing video games may not be my favorite hobby, but I definitely enjoy watching others play."

Playing	2/5
Viewing	4/5
Owning	2/5

newzoo Gamer Segmentation™

HOBBIES

Music

Film/movies

Travel & holidays

⚊ Average Gamer persona

HOME SITUATION

Alone

With my parents

Together or alone, with kids

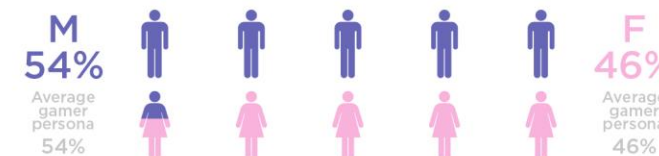Together, without kids

⚊ Average Gamer persona

GENDER SPLIT

M 54%
Average gamer persona 54%
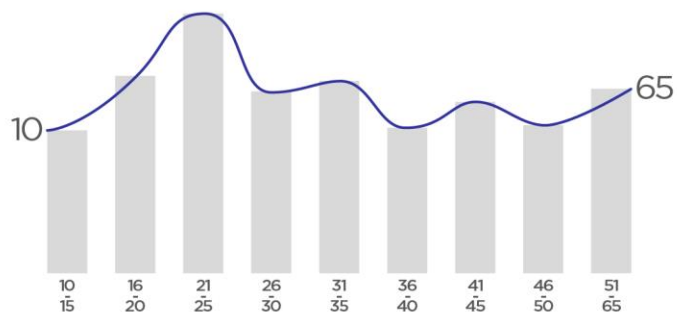
F 46%
Average gamer persona 46%

30

SUMMARY

The Backseat Viewer watches gaming video content or esports on Twitch, YouTube, and/or Mixer but hardly ever plays games. Many people in this persona are lapsed gamers who once enjoyed core gaming but—due to work and/or family commitments—no longer have the hardware or time to play. Or, like many traditional sports fans, they simply enjoy the spectacle of watching the pros play.

AGE DISTRIBUTION

Average	Median	Mode
32.95 years old	**31** years old	**21-25** years old

10

65

| 10 15 | 16 20 | 21 25 | 26 30 | 31 35 | 36 40 | 41 45 | 46 50 | 51 65 |

THE BACKSEAT VIEWER

6%
of gaming
enthusiasts

"I used to game a lot. Whenever I watch a big esports event and watch others playing games, that passion is reignited."

Playing					1/5
Viewing					4/5
Owning					1/5

newzoo Gamer Segmentation™

HOBBIES

Music

Film/movies

Sports

⚊ Average Gamer persona

HOME SITUATION

Alone

With my parents

Together or alone, with kids

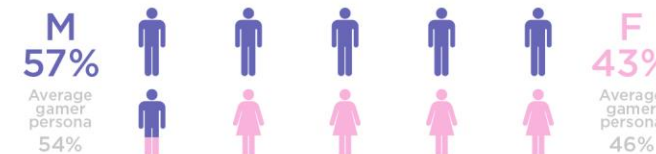Together, without kids

⚊ Average Gamer persona

GENDER SPLIT

M **57%**
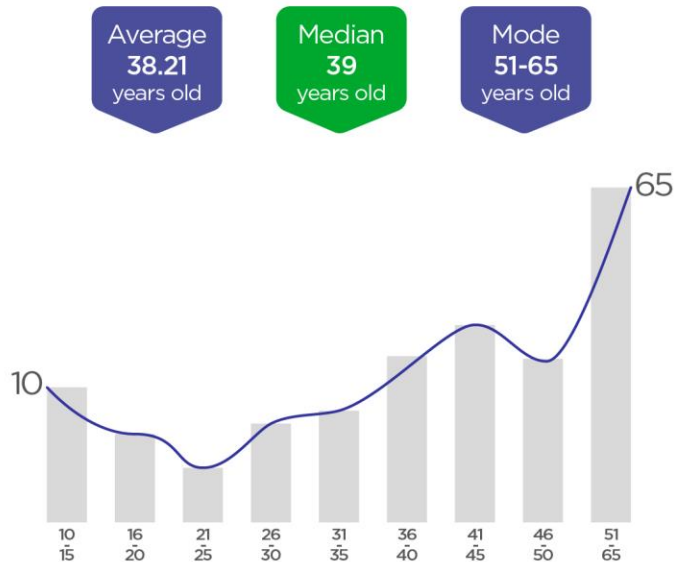Average gamer persona 54%

F **43%**
Average gamer persona 46%

SUMMARY

The lapsed gamer currently neither plays video games nor watches video game content. These are people who played games in the past, with around a quarter of them actually intending to play video games again in the next 6 months. For those that intend to start playing again a lack of time is the main reason provided that they don't currently play. Those that don't intend to start playing again would rather spend their time on other activities.

AGE DISTRIBUTION

Average 38.21 years old	Median 39 years old	Mode 51-65 years old

10

65

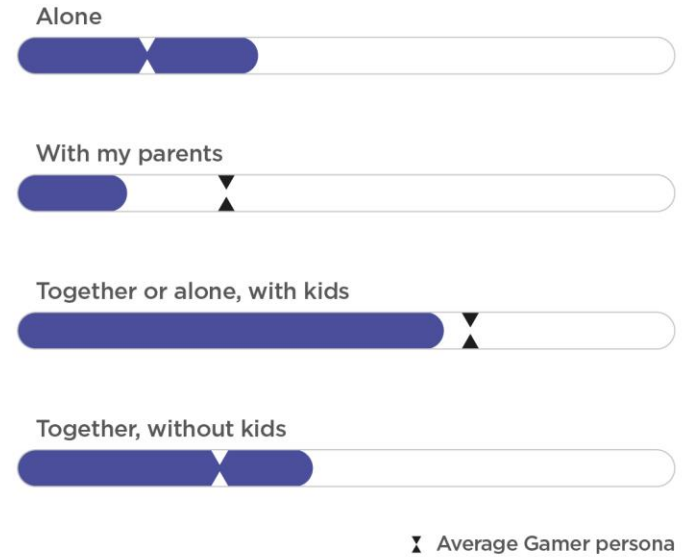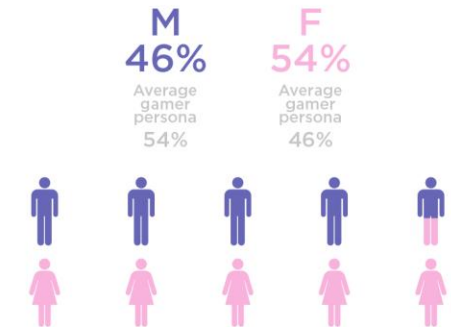| 10 - 15 | 16 - 20 | 21 - 25 | 26 - 30 | 31 - 35 | 36 - 40 | 41 - 45 | 46 - 50 | 51 - 65 |

27% of gaming enthusiasts

THE LAPSED GAMER

"Back in the day I used to game a lot, but my time became more limited when I started working and I gave priority to other interests over gaming."

Playing						0/5
Viewing						0/5
Owning						0/5

HOME SITUATION

Alone

With my parents

Together or alone, with kids

Together, without kids

⚊ Average Gamer persona

GENDER SPLIT

M 46%
Average gamer persona 54%

F 54%
Average gamer persona 46%

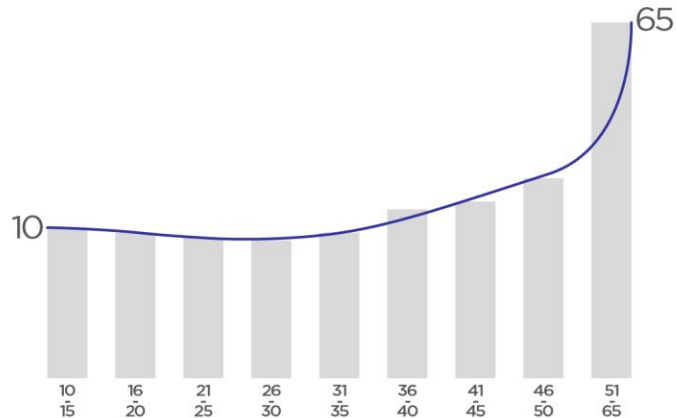*Based on data for the United States and China

SUMMARY

The Time Filler has little interest in game video content and esports. These casual gamers rarely spend more than a few hours gaming each week, so they don't see games as a major part of their lives. They play to pass time; for example, playing a quick game of Candy Crush or Clash of Clans while commuting to work or waiting for a friend. For this reason, hardware is not relevant for Time Fillers.

AGE DISTRIBUTION

Average	Median	Mode
37.41 years old	**38** years old	**51-65** years old

65

10

10 15	16 20	21 25	26 30	31 35	36 40	41 45	46 50	51 65

27% of gaming enthusiasts

THE TIME FILLER

"I only game when I have time to spare or at social events. Mobile games are my go-to."

Playing 2/5

Viewing 1/5

Owning 2/5

newzoo Gamer Segmentation™

HOBBIES

Film/movies

Music

Travel & holidays

⌛ Average Gamer persona

HOME SITUATION

Alone

With my parents

Together or alone, with kids

Together, without kids

⌛ Average Gamer persona

GENDER SPLIT

M 39% Average gamer persona 54%

F 61% Average gamer persona 46%