

The Many Ways We Play

A New View of Game Players

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01:

INTRODUCTION

Gamers are a growing influence in our global economy and cultures. Accounting for over \$184B worldwide annually (Newzoo, Global Games Market Report, 2023), the growth of gaming has led to more brands including gamers in their marketing strategies.

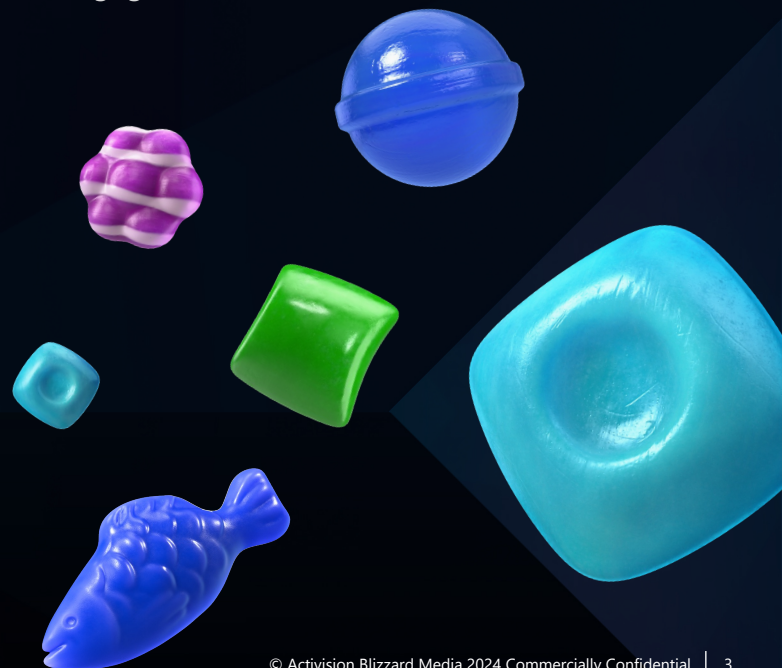
Gaming, audiences, and their behaviors are constantly changing, indicating an exciting chance to adapt our perceptions and understanding of them. The gaming industry is far from monolithic, characterized instead by its diversity, both in terms of the games it offers and the audience it attracts. To gain a deeper understanding of today's gaming audiences, Activision Blizzard Media conducted a survey of 10,202 gamers, examining players' gameplay frequency, years of gaming experience, preferred platforms and genres, self-identity, motivations, and the emotions elicited by gaming.

Our analysis has led to the identification of six distinct gaming audience segments, which can be broadly categorized into two predominant playing groups: multiplatform players and mobile-centric players.

We discovered several unifying traits across all audience segments. These included mobile

gaming as a common denominator and the fact that most gaming audiences are seasoned players, regardless of their age. We also learned that the players' choice of platform, whether multiplatform or predominantly mobile-centric, strongly correlates with their self-identification as 'gamers'. While differences in playing behaviors impact the likelihood of identifying as a gamer, platform preference also influences when gaming is viewed as a social connector, and how players receive and respond to in-game advertising.

A better understanding of these points of unity and differentiation reveals a multifaceted audience group that continues to evolve alongside the medium with which it engages.



02:

THE POWER OF PLATFORMS:

Mobile Centric vs. Multiplatform

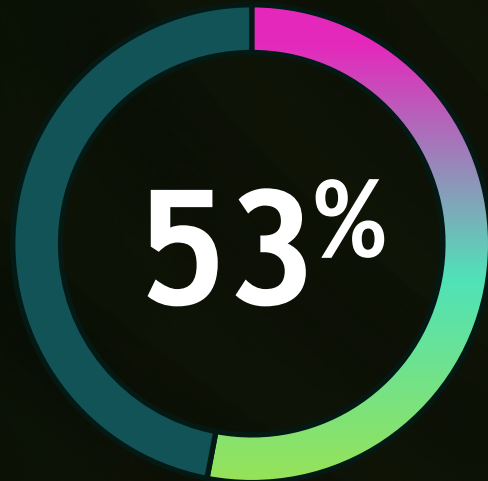
There are two broad groups within the data splitting the sample by platform preference.

Mobile-Centric Players

The first group is characterized by a mobile-centric approach to gaming. They are not “mobile exclusive” players, but instead reach for mobile gaming first before other platforms for their entertainment. These players include The Gaming Veterans, The Late Adopters, and The Casual Connectors.

The defining traits of this group are:

- Almost all of their gaming time is spent on mobile devices.
- They tend to be individuals who either didn't grow up with gaming or discovered it later in life.
- They usually don't identify as gamers.
- Despite not identifying as gamers, some in this group still value gaming as a means of socialization.



of all players play on
mobile daily



Multiplatform Players

The second group consists of players deeply immersed in the gaming ecosystem. These players enjoy playing on a variety of

platforms, including mobile, regularly. This includes The Devoted, The Up-and-Comers, and The New Media Consumers.

The defining traits of this group are:

- They engage in gaming across multiple touchpoints, including mobile, PC, and console.
- They largely identify as gamers and have a positive opinion of gaming.
- They view gaming as a primary means of entertainment and extract more personal value from it.
- They have established times during which they play games.
- They generally have a more positive viewpoint on ads, particularly when it comes to influencers.

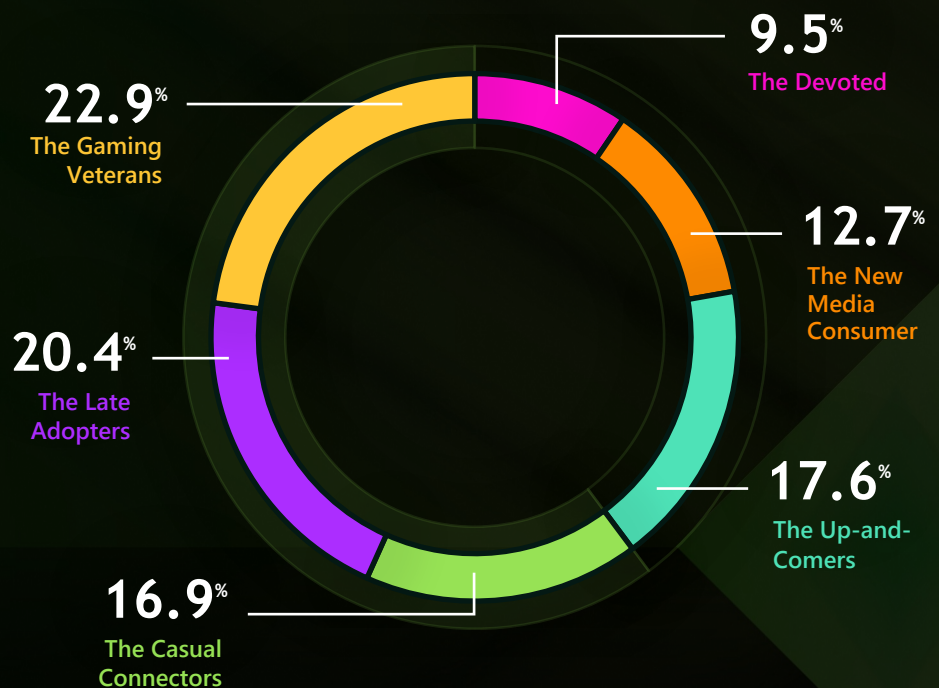
The Six Game Audience Segments

Mobile-Centric Players

- The Gaming Veterans
- The Late Adopters
- The Casual Connectors

Multiplatform Players

- The Devoted
- The New Media Consumers
- The Up-and-Comers



03:

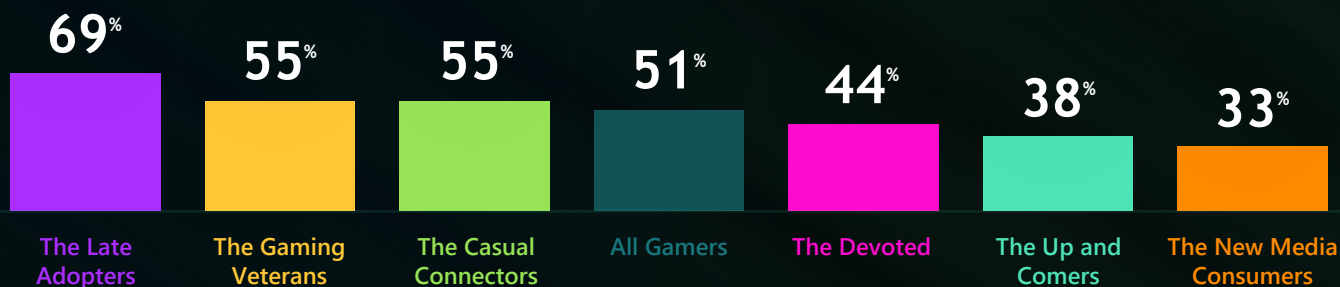
WHAT UNIFIES MOBILE-CENTRIC & MULTIPLATFORM PLAYERS

The single most significant commonality across all player groups is the engagement with mobile gaming. Almost all survey respondents, regardless of other factors, can be categorized as mobile game players.

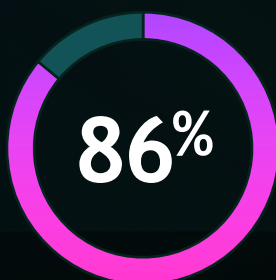
The data shows that 86% of players engage in mobile gaming at least once per week. This is a testament to the universal nature of mobile gaming. Among all the genres, Puzzle/Casual games hold a unique position. Puzzle game engagement rates are consistently high across all segments, marking them as the go-to choice for most players.

Genres Played: Puzzle

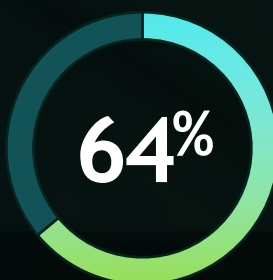
(Past 30 days)



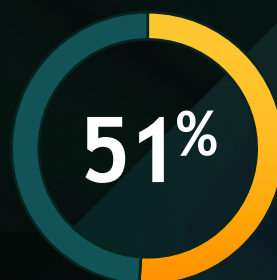
Mobile is the Common Denominator



play mobile games
at least once a week



of all segments
play to relax



of all segments
play puzzle games

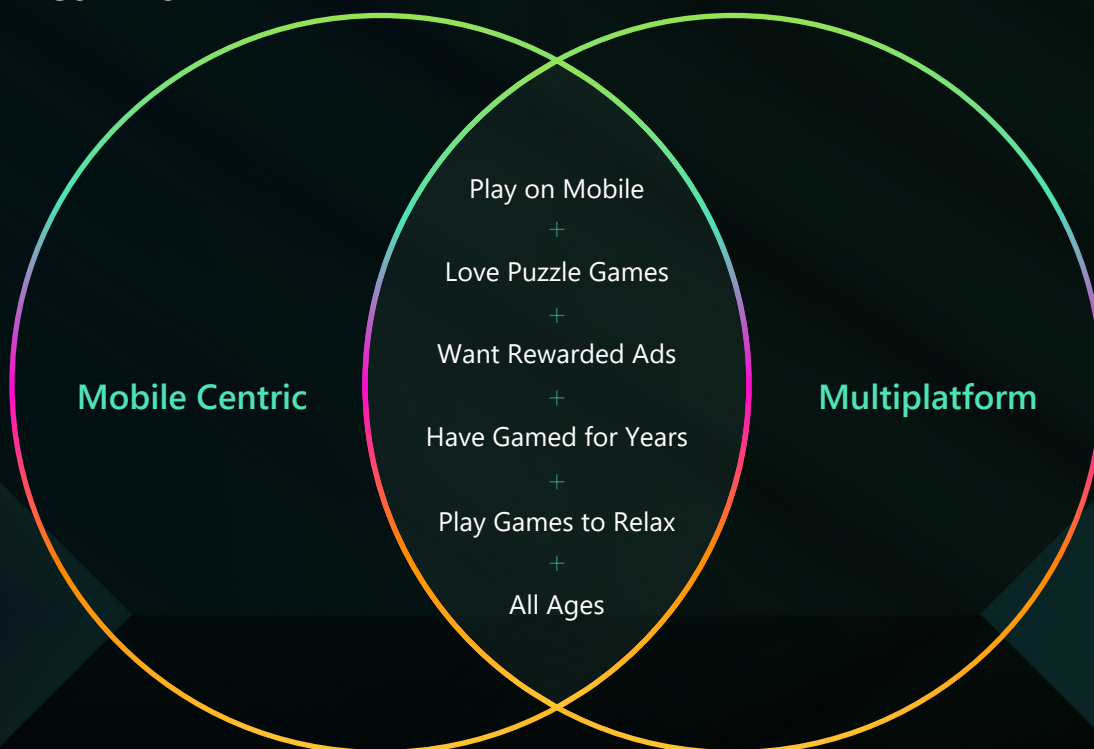
There's a strong correlation between individuals who play games across multiple platforms and those who self-identify as a "gamer." This parallel shows that the identity of a "gamer" is not confined to a single platform but spans several.

The segments reveal a uniform appreciation for rewards linked to advertisements. However, a shared dislike is also evident when an advertisement interrupts gameplay. An exception to this pattern is observed in the segment of "The New Media Consumer" indicating a deviating preference.

One common value that all segments share is the relaxation that games provide. This aspect is uniformly acknowledged across all segments, showing that games serve as a relaxing escape for many.

It's a common misconception that the most immersed gamers are young players. The data, however, paints a different picture. Long tenure in playing games and average ages above 30 are the norm across all segments. This shows that gaming is not just a youthful pastime but a hobby enjoyed by many, regardless of age.

What Game Players Have in Common



04:

WHAT DIFFERENTIATES MOBILE-CENTRIC PLAYERS

The Gaming Veterans

A distinct group of seasoned players who've "been there, done that" and have engaged with video games for as long as they've been available. They now predominantly split their time between mobile and PC gaming.

The Gaming Veterans represent a unique segment in the gaming world, characterized by their long history with gaming and a tendency to dabble between mobile and PC play. With the longest gaming tenure of 21 years, they are the most male-skewed among mobile-centric segments. While they largely play alone on mobile platforms for relaxation and enjoyment, they also frequently engage in PC and console gaming. Despite their extensive gaming experience, 62% of this group doesn't identify as gamers, reflecting a more casual approach to their gaming habits. As the largest gaming audience group, they constitute a considerable 23% of all gamers.

21YR

of playing games
on average

37%

play on PC at
least once a week

67%

play games
to relax



The Mobile-Centric Players

The Gaming Veterans

AVERAGE GAMING TENURE:

21 years

AVERAGE AGE:

50 years old

GENDER:



- 66% Male
- 34% Female

SELF IDENTIFY AS "GAMER:"

Despite their long tenure, 62% do not identify themselves as gamers.

PLAYSTYLE:

These individuals generally play games on mobile devices, often alone, and view gaming as a means of relaxation (67%) and enjoyment (74%). However, compared to other mobile-centric segments, they are more likely to play games on PC (37% at least once per week) and console (41% at least once per week).

LIFESTYLE:

"I like to keep up with gaming news even if I don't play many of the games themselves these days. It's an expensive hobby in terms of time and money and I don't have enough of either to play like I once did but enjoy keeping my hand in to at least some extent."

- Male, Age 47



The Mobile-Centric Players

The Late Adopters

Players who have embraced gaming later in life, primarily through mobile platforms. They have the least connection to the media compared to other segments.

The Late Adopters are a segment of gamers who discovered gaming later in life, primarily through mobile platforms, and have the least connection to the medium. Distinguished by their shorter gaming time, older average age, with about 54% being 55 or older, and a predominantly female demographic (78%), they are less likely to engage with other gaming platforms outside of mobile. Despite being the most active mobile gamers within the mobile-centric segment, gaming is a less significant part of their media consumption. They spend the fewest hours gaming, averaging 9 hours per week, but 61% play mobile games daily (the highest of all segments) with a preference for Match-3 and Word Search games. This group, representing 20% of all gamers and having the shortest gaming tenure of six and a half years, is the second largest gaming audience group.

78%

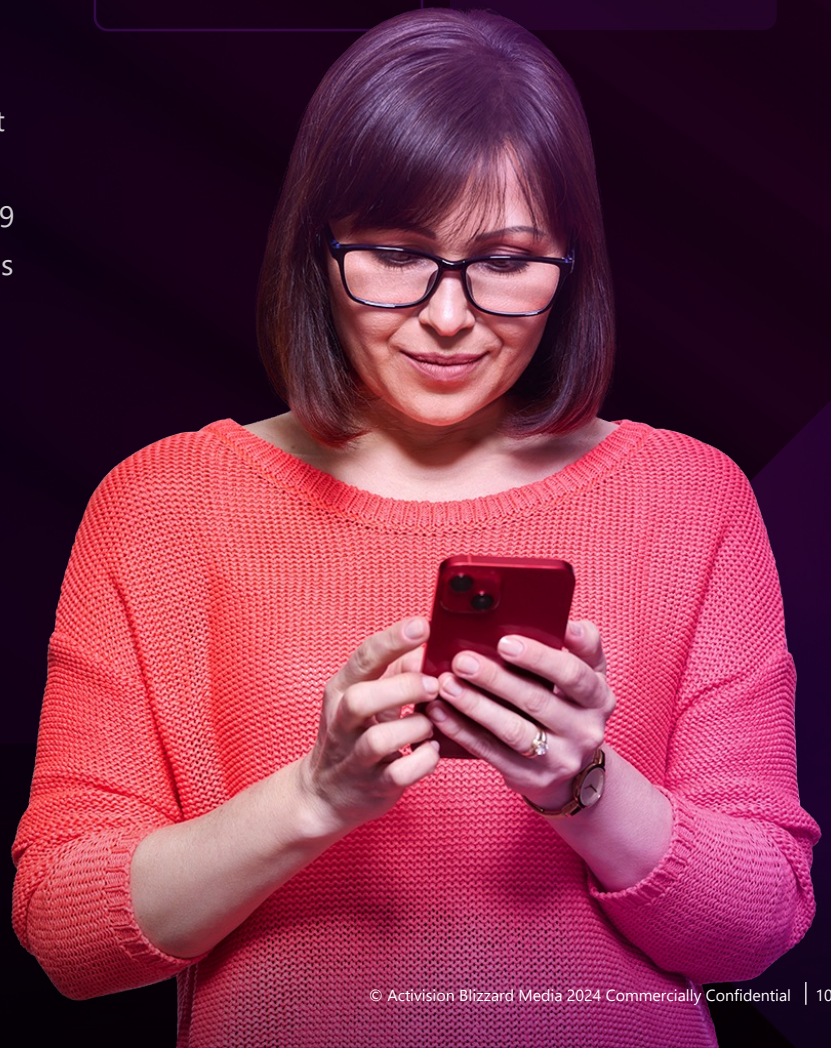
are women

9HR

of gaming weekly

61%

play mobile games
on a daily basis



The Mobile-Centric Players

The Late Adopters

AVERAGE GAMING TENURE:

6.5 years

AVERAGE AGE:

51 years old

GENDER:



- 78% Female
- 21% Male
- ~1% Non-Binary or Third Gender

SELF IDENTIFY AS "GAMER:"

Gaming has not yet become a significant part of their identity.

78% state they do not identify as gamers.

PLAYSTYLE:

While this group is predominantly focused on mobile gaming, they are less likely to engage with other platforms. Although they represent the most active mobile gamers within the mobile-centric segment, they view gaming as a lesser part of their overall media consumption. Their motivations primarily include relaxation and passing time, both cited by 60% of respondents. Despite averaging the least gaming time among all groups, around 9 hours weekly, a significant 61% play mobile games daily, the highest frequency of any group.

LIFESTYLE:

"Gaming is something I like to do to relax and to have fun, but also to challenge myself and improve my own scores. I play when I can, but I have other interests and hobbies I also do and often choose to do instead of gaming."

- Female, Age 39



The Mobile-Centric Players

The Casual Connectors

A segment of mobile-centric players who have more positive associations with games than other mobile-centric segments and see them as a means of social connection.

The Casual Connectors form a distinct segment of mobile-centric gamers who view games as a social channel for connecting with others. Characterized by their positive associations with gaming, they are more socially inclined than other mobile-centric segments like The Late Adopters and The Gaming Veterans. As the youngest group among mobile-centric players, with about 41% aged between 18-34, they demonstrate a strong interest in communal gameplay. With an average gaming tenure of 12 years, this group, which constitutes 17% of all gamers, values the potential of games to promote teamwork and social interaction more than other segments.

42%

agree gaming
brings people
together

82%

play mobile
games at least
once a week

38%

play games for the
social aspects



The Mobile-Centric Players

The Casual Connectors

AVERAGE GAMING TENURE:

12 years

AVERAGE AGE:

41 years old

GENDER:



- 69% Female
- 30% Male
- ~1% Non-Binary or Third Gender

PLAYSTYLE:

This group is highly driven by the social aspects of gaming, with one third engaging in games for interaction with other players. Their belief that video games bring people together, shared by 42% of the respondents, indicates a strong inclination towards communal gameplay. The Casual Connectors rank second only to the multiplatform New Media Consumers in communal gameplay. While mobile gaming is their primary platform (with 82% playing at least once a week), Casual Connectors also have the highest weekly console (48%) and handheld console (19%) use compared to other mobile-oriented groups."

LIFESTYLE:

"It fulfills a number of roles. I use it as a form of escapism, to occupy my mind, to challenge myself, and to spend quality time with my son."

- Male, Age 42

SELF IDENTIFY AS "GAMER:"

25% identify as a gamer



The Mobile-Centric Players

05:

WHAT DIFFERENTIATES MULTIPLATFORM PLAYERS

The Up-and-Comers

These players represent a lifetime of gaming culture, where video games are a part of one's upbringing and general social culture in the same vein as television or social media.

The Up-and-Comers comprise a unique subset of gamers who lean towards console-centric gameplay and exhibit a more solitary gaming style. Predominantly younger, this group has grown up with gaming as a consistent presence in their lives. Despite logging similar gaming hours to The Devoted, they exhibit a lower emotional attachment to gaming. Their platform preference is predominantly console-based, with a considerable amount of gameplay also taking place on mobile devices. This group, which makes up 18% of all gamers, tends to favor shooter (65%), action/adventure (65%), and sports (46%) genres and views gaming as their primary source of entertainment. However, their gaming experience is less socially driven and more individually focused compared to other segments.

56%

between the
ages of 18-34

42%

play on
console daily

35%

say gaming
is their top
media activity



The Multiplatform Players

The Up-and-Comers

AVERAGE GAMING TENURE:

16 years

AVERAGE AGE:

34 years old

GENDER:



- 76% Male
- 22% Female
- ~2% Non-Binary or Third Gender

SELF IDENTIFY AS "GAMER:"

79% identify as a gamer

PLAYSTYLE:

Mobile gaming receives a fair amount of platform share, however, console gaming is definitely the preferred option with the one of the highest daily gameplay of any audience group (42%). Up-and-Comers are more likely to play alone and via console relative to PC, and relative to The Devoted players.

LIFESTYLE:

"Gaming is how I like to experience entertainment. That can be as simple as watching someone game, or partaking in it myself. While some like to watch TV at night to unwind, I like to game."

- Male, Age 18



The New Media Consumers

These players came to be within some of gaming's strongest years in pop culture and within the past decade, which saw the eighth generation of video game consoles.

As unique mega-consumers, New Media Consumers differ significantly from other gamer segments. Less emotionally attached to gaming and with fewer years playing, they are multifaceted in their entertainment habits, with gaming being important but not dominant. With the highest relative engagement with portable gaming, their gaming sessions are mostly social. This group is the most ad-friendly, least disrupted by ads, and most influenced by ads to make purchases. Despite their shorter gaming tenure of 11 years, they log the highest weekly playing hours at 29. Comprising 13% of all gaming audiences, they form the second smallest group.

69%

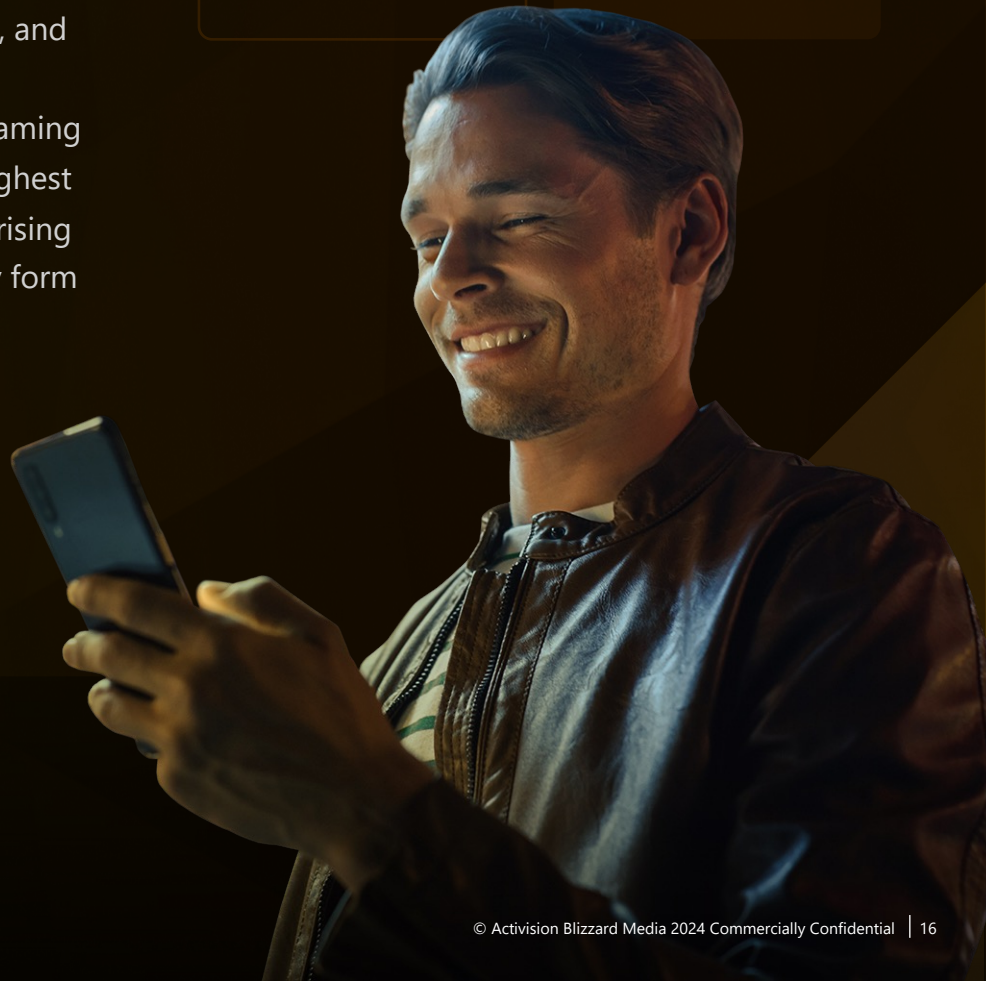
higher across all **purchase categories**

21%

play daily on handheld and **portable consoles**

32%

play mobile games **with friends**



The Multiplatform Players

The New Media Consumers

AVERAGE GAMING TENURE:

11 years

AVERAGE AGE:

35 years old

GENDER:



- 64% Male
- 35% Female
- ~1% Non-Binary or Third Gender

SELF IDENTIFY AS "GAMER:"

75% identify as a gamer

PLAYSTYLE:

More than any other segment, 64% of these players report buying new games as soon as they're released, and 69% make sure to have the latest gaming hardware (consoles, graphics cards, VR etc.), and their interest in having the best and latest in gaming extends to other products. These players are primarily motivated by the social aspects of gaming. Unlike other segments, they are far less likely to come to gaming for relaxation, with only 49% doing so. This group displays above-average interest in all gaming genres (with the exception of Puzzle games and MMORPGs), but they are most interested in shooter (46%), sports (41%), and action/adventure games (38%); 91% have either purchased or intend to purchase a subscription game service, giving them access to a greater game library and opportunities to connect with other players.

LIFESTYLE:

"In gaming life, I describe my role as a Collector. I enjoy amassing in-game items, rare gear, or virtual achievements. I take pride in building an extensive collection within the games I play."

- Male, Age 29



The Devoted

These players are the most likely to find value and identity within gaming, to feel that they are connected to their characters, and that gaming is more than just a hobby.

The Devoted represent the most dedicated and engrossed segment of gaming audiences, strongly identifying themselves as gamers and viewing gaming as more than just a pastime. They show the highest positive emotions related to gaming and consistently set dedicated time aside for play. Their engagement spans across all game genres and platforms, using gaming for socialization, mood enhancement, and as an immersive experience to explore, create, and escape from reality. Although they make up only a small portion of the overall gaming audience, The Devoted's average weekly playtime matches the New Media Consumers, but out paces all other segments, with a significantly longer tenure in gaming than the New Media Consumers. Moreover, a substantial portion of this group plans to increase their gameplay time in the coming year.

83%

identify as
a gamer

29HR

per week on
average

47%

play to explore
places they can't
go in real life



The Devoted

AVERAGE GAMING TENURE:

17 years

AVERAGE AGE:

37 years old

GENDER:



- 71% Male
- 28% Female
- ~1% Non-Binary or Third Gender

SELF IDENTIFY AS "GAMER:"

83% identify as a gamer

PLAYSTYLE:

More than any other segment, The Devoted are motivated to play video games to explore places they can't go in real life (47%), for the narratives/storylines (43%), building/crafting virtual characters/worlds (43%), and escaping everyday life (61%). They have high levels of engagement across virtually all game genres, and are most likely to use games to socialize and use as a mood booster.

LIFESTYLE:

"Gaming holds a significant place in my life; it's more than just a pastime. Whether I'm seeking a thrilling adventure, testing my reflexes in competitive matches, or immersing myself in captivating narratives, gaming enriches my life with joy, excitement, and a sense of accomplishment that is truly unique."

- Male, Age 36



06:

A NEW VIEW ON ADVERTISING TO DIVERSE GAMING AUDIENCES

The gaming audience is a multifaceted constellation of unique groups each with varied tastes, behaviors, and feelings on advertising. Just like there's no one-size-fits-all definition of a gamer, there is no one-size-fits-all approach to in-game advertising. When advertisers acknowledge these differences, they have a chance to make a significant, resonant connection with their audience that shares the positive affect gamers already have for their favorite IPs.

Among the various gamer groups, "The Devoted" stand out. With a high self-identification rate as gamers (83%), they tend to be the most receptive to in-game advertising. They exhibit a positive sentiment towards ads, particularly from favored brands, those introducing novel elements, or offering rewarding incentives. This positivity isn't incidental but significantly influenced by their engagement level with the game and their

gamer identity. Their narrative is primarily centered around their identity as dedicated gamers, reinforcing that there is no universal solution for in-game advertising.

Alternatively, multiplatform gamers such as the "New Media Consumers" provide a different angle. These gamers hold diverse entertainment tastes, and while they might not express as much positive ad sentiment as "The Devoted," they exhibit significantly less negative sentiment towards ads. This is particularly true for ads that interrupt their gaming experience, suggesting an alternative approach for brands to effectively engage these groups.



Understanding these varied motivations, playing behaviors, and ad receptivity is critical for brands. It allows them to identify the most suitable environment and method to reach their audience effectively. Factors such as the type of game being played, the featured brands, and the timing of the gaming session can significantly influence ad preferences and receptivity.

Additionally, the importance of gaming in an individual's life can greatly impact ad receptivity. For some, gaming is a casual pastime, while for others, it's an integral part

of their life. This insight can help advertisers determine the best times to display their ads for maximum attention and engagement.

Given that gaming has become the largest second-screen activity today, understanding gamers' unique views, preferences, and behaviors is paramount. It provides valuable insights for advertisers, enabling them to transform a generic approach into a more effective, tailored ad strategy, leading to better results and stronger connections with their audience.

The Gaming Veterans



The Late Adopters



The Casual Connectors



The Up-and-Comers



The New Media Consumer



The Devoted



07:

UNDERSTANDING THE MANY WAYS WE PLAY

The nature of gaming has evolved, powered by a diverse array of gamers across various platforms, genres, and motivations. These six gaming segments reveal that players' core differences come down to their primary choice of platform. Each of these segments showcases distinct profiles in terms of their gaming tenure, playstyle, shopping habits, and self-identification as gamers. However, what unifies them is their high engagement in mobile gaming.

Identifying as a gamer and playing games across multiple platforms have shown to be highly correlated. But all segments show appreciation for rewards from advertisements and are looking for advertisements that feel immersive and relevant to the gaming experience.

Understanding the nuances of these gaming audience segments is key for advertisers to effectively tap into this vast market. Tailoring in-game experiences, marketing strategies, and monetization tactics to resonate with each unique segment can lead to more

impactful campaigns and better results. As the world of gaming continues to change, so too should our approach to engaging with and understanding its players. The universal appeal of mobile gaming and the shared attitudes towards gaming experiences offer a solid foundation for creating effective and inclusive strategies.

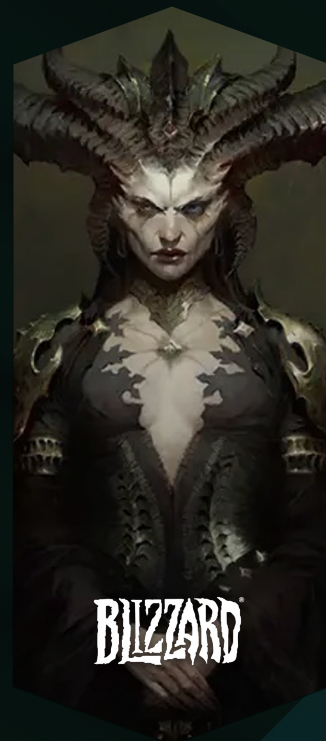


Research Methodology

To better understand the gaming audience, Activision Blizzard Media conducted a quantitative study among adults over the age of 18 who played, watched, or engaged with video games at least once in the past month. Clustering was performed using a k-prototypes model, selected for ability to effectively handle both categorical and numerical data. The online-based study surveyed 10,202 gamers split across the United States and the United Kingdom.

About Activision Blizzard Media

Activision Blizzard Media Ltd is the gateway for brands to the leading interactive entertainment company with hundreds of millions of monthly active users around the world. Our legendary portfolio includes iconic mobile game franchises such as Candy Crush™, esports like the Call of Duty League™, the Overwatch League™ and some of the top PC and console gaming franchises such as Call of Duty®, World of Warcraft®, and StarCraft®. The idea is simple: great game experiences offer great marketing experiences.



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