

GAMING & ESPORTS REPORT 2023

Reaching Gamers – everywhere

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► Introduction

The media and entertainment industry is constantly changing with the proliferation of non-traditional and digital media channels, and the way consumers engage with media and entertainment has evolved. Gaming as a popular pastime has played a critical role in shaping the way audiences interact, engage, and consume content as they engage with games and gaming platforms in more ways than ever before. As the entertainment landscape evolves, understanding gaming's role in global consumer's everyday life among other entertainment activities is crucial for modern marketers to identify where gaming sits in the media mix and explore the best synergies.

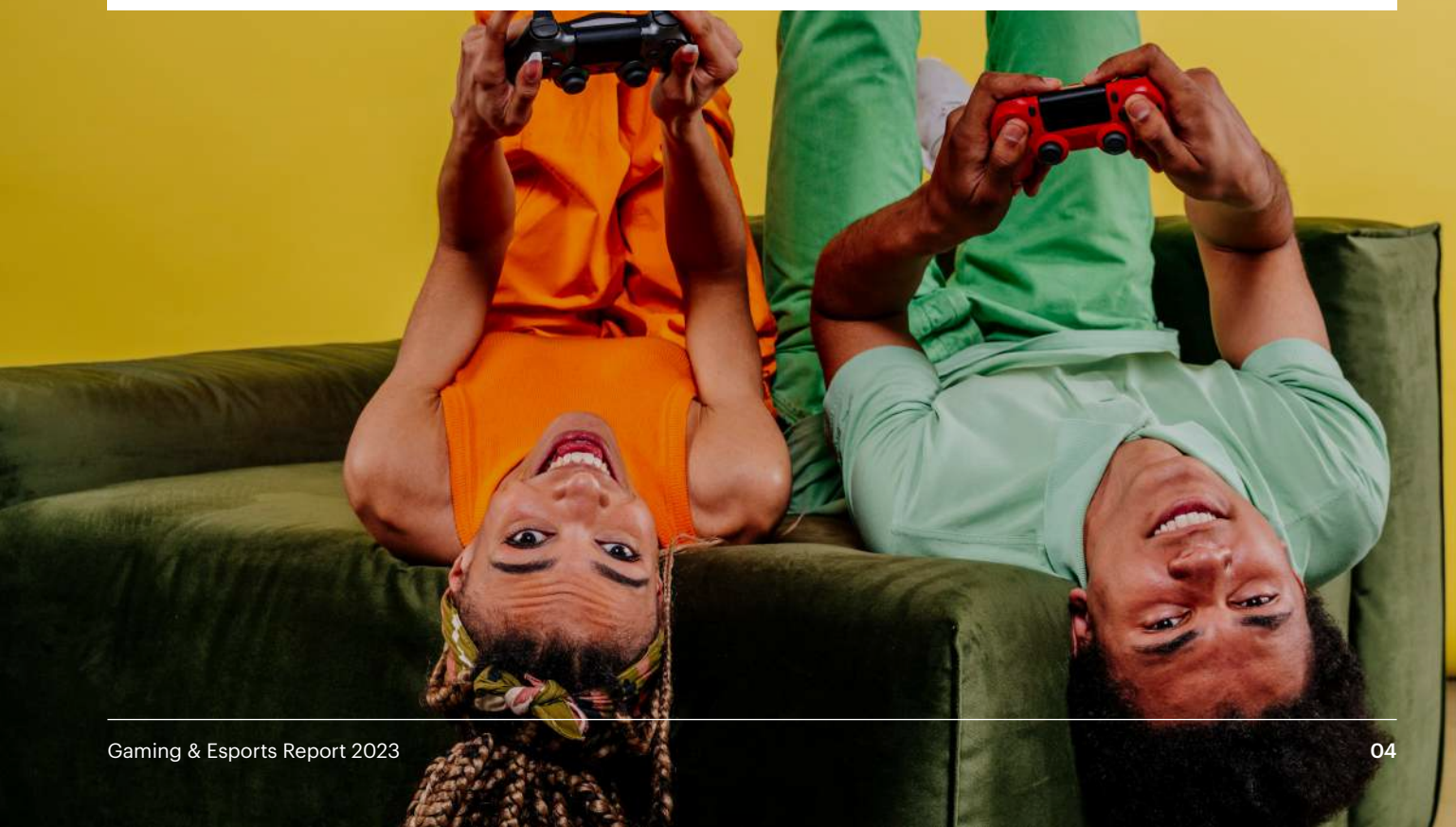
This report examines the entertainment habits of global consumers and where gaming fits in the entertainment landscape, the types of media activities undertaken and what's keeping consumers entertained. We explore engagement with gaming, devices used to game and the impact of advertising platforms on brand and product perception. We assess the relationship gamers have with in-game and out of game advertising, how best to connect with gamers and how brands and advertisers can form a deep bond with the highly engaged group.

This report uses global research across a selection of 18 international markets in tandem with syndicated data from YouGov Profiles.

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How does gaming fit into today's global entertainment landscape?

Over the last few years, the media, entertainment, and gaming industry has seen considerable changes. Pandemic lockdown restrictions across the regions, prevented consumers from traveling, and the hybrid and remote working has become the norm for many organizations. Consequently, consumers are spending more time at home, which has influenced their media, entertainment, and gaming consumption. New **YouGov Research** explores the types of media activities consumers are undertaking in a typical week. Faced with a plethora of media choices, what's keeping these consumers entertained and crucially where does gaming fit into the global media and entertainment landscape?

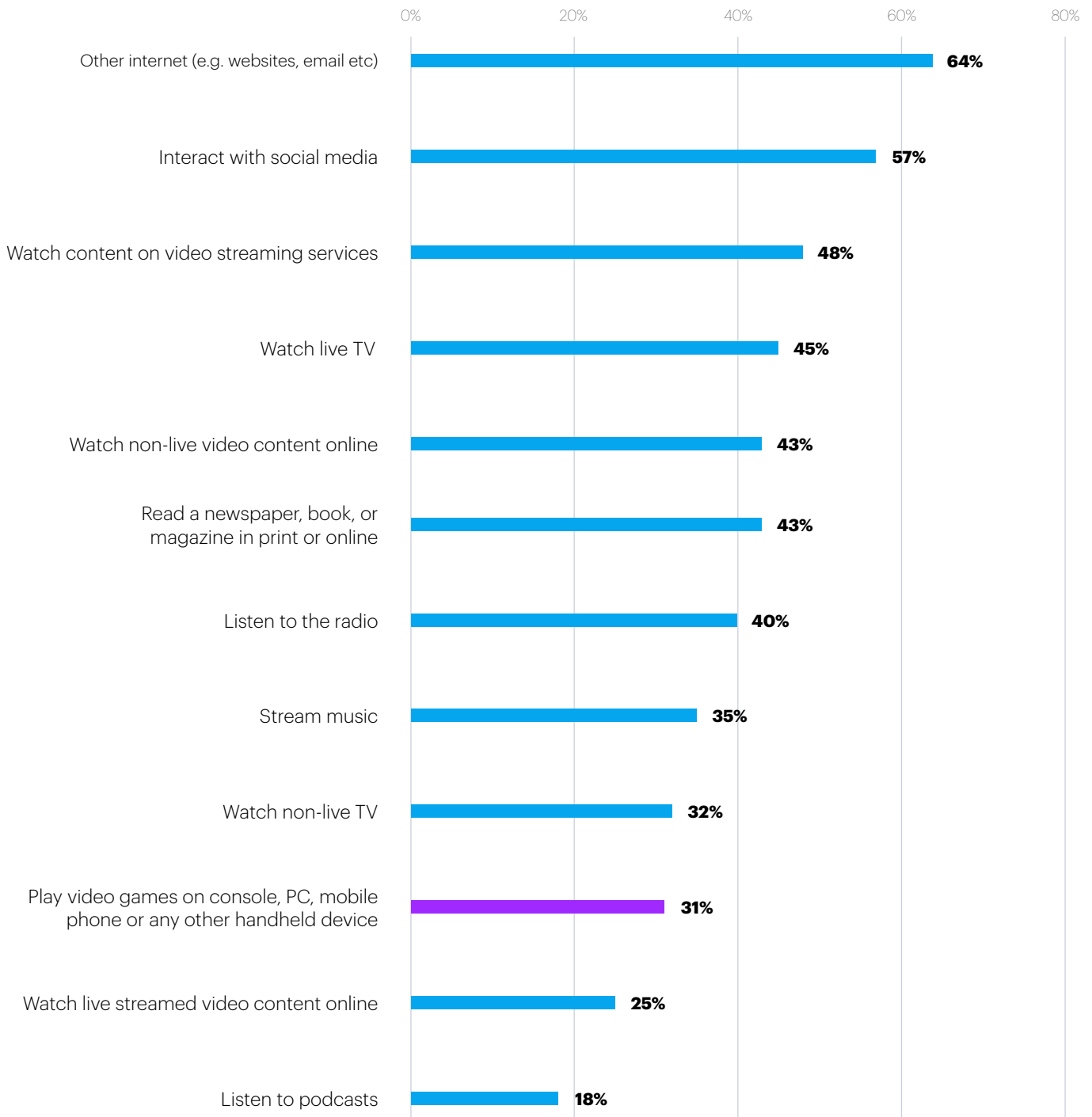


Digital media engagement is the most popular weekly entertainment activity

Internet-based activities dominate the current global media/entertainment landscape. Among all global consumers, visiting websites (**64%**), social media usage (**57%**) and watching content on video streaming services such as Netflix (**48%**) are the top weekly media activities and the top entertainment activities undertaken most often.

About a third of the global population (**31%**) engages in playing video games on a weekly basis. Gaming boomed during the pandemic giving people a way to be both entertained and connected and continues to have a strong foothold in the media mix in terms of weekly reach.

Media activities undertaken in a typical week - Global



Q: Which, if any, of the following do you typically do on a weekly basis?



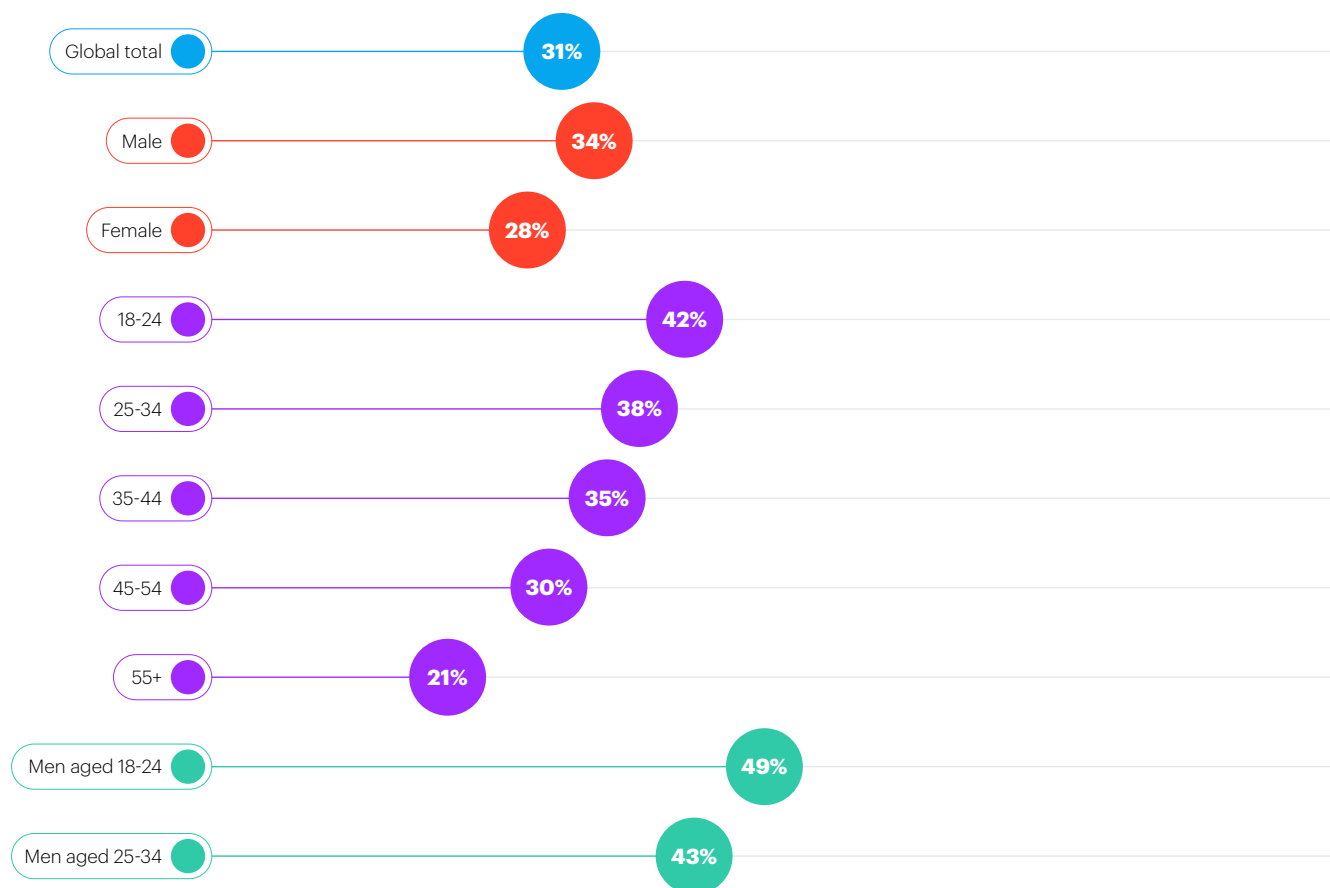
Gaming weekly reach

Turning to the demographics of global weekly gamers, our data shows that whilst **34%** of men game each week, women are not far behind at **28%**. Rising accessibility of gaming via mobile and gaming genres such as puzzle, and Role-playing

games (RPGs) have fuelled interest in gaming among women. In terms of age, weekly gaming peaks among all global adults aged 18-24 (**42%**), increasing to almost half of 18-24-year-old men.

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Play video games in a typical week – Global by demographics



Q: Which, if any, of the following do you typically do on a weekly basis?

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Gaming ranks highest for under 34s

When comparing different weekly media activities by age, we see that the popularity of non-traditional digitally enabled activities such as gaming, social media, video streaming, and video content in general are more popular media choices

among the global consumers aged under 45. On the other hand, traditional media activities such as watching live and non-live TV, listening to the radio, and reading a newspaper are more prevalent in the older age groups.

In terms of global ranking of weekly media activities, gaming ranks 10th overall, jumping to 6th position among global consumers aged under 34 - leaping ahead of print readership, listening to the radio, and watching live, and

non-live TV. Among men aged 18-24, weekly gaming moves into 3rd position, behind broad internet use, and interacting with social media.

Media activities undertaken in a typical week - Global by age

	18-24	25-34	35-44	45-54	55+
Other internet (e.g. websites, email etc)	54%	55%	60%	66%	74%
Interact with social media	60%	60%	60%	58%	53%
Watch content on video streaming services	51%	52%	55%	49%	40%
Watch live TV	25%	30%	39%	48%	63%
Watch non-live video content online	53%	47%	48%	44%	34%
Read a newspaper, book, or magazine in print or online	30%	31%	38%	44%	57%
Listen to the radio	17%	27%	37%	47%	56%
Stream music	51%	45%	38%	35%	22%
Watch non-live TV	23%	28%	32%	36%	38%
Play video games on console, PC, mobile phone or any other handheld device	42%	38%	35%	30%	21%
Watch live streamed video content online	31%	30%	29%	25%	18%
Listen to podcasts	20%	23%	20%	18%	12%

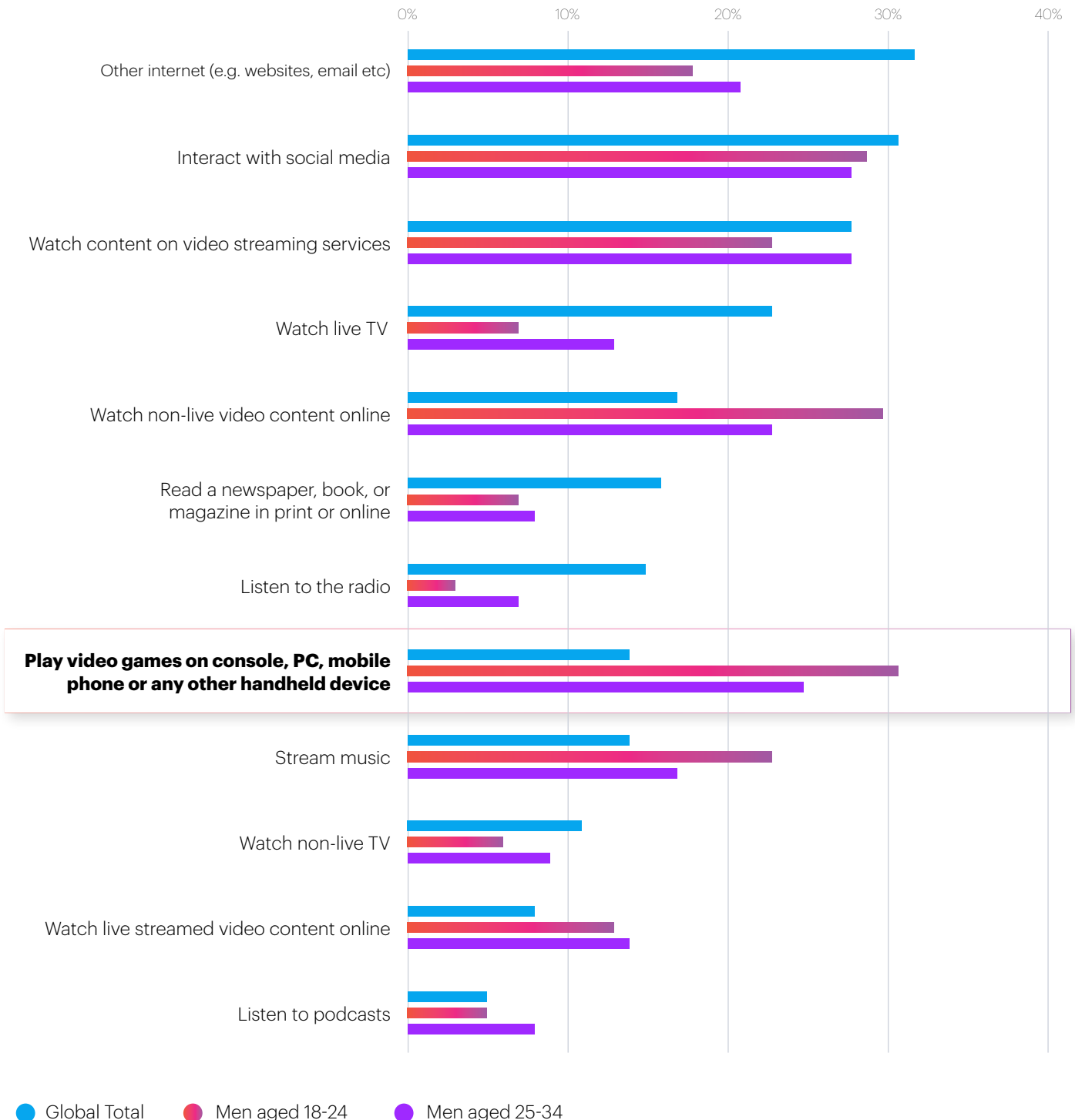
Q: Which, if any, of the following do you typically do on a weekly basis?

Gaming ranks top among men aged 18-24 for media types consumed most often

When we delve into the top media activities people consume most often in a typical week, broad internet use remains the top scoring media, followed by social media. Watching content on video streaming services ranks 3rd, followed by live TV. However, when we look at men aged 18-24, we see a very different ranking of media engagement. Globally,

gaming is the number one media choice, followed closely by watching non-live video content online, and social media. In addition, they are more than four times more likely to play video games most often than watch live TV (**31% vs. 7%**).

Media activities spend the most time on per week - Global



Q: Which three activities would you say you spend the **most** time on in each week?



High engagement with gaming

In addition to superior weekly penetrations vs. TV among younger demographics, levels of engagement for gaming are also higher. On average, global viewers spend 10.4 hours per week, watching live TV. Whilst this increases to over 13 hours among the over 55s, among TV viewers aged 18-24, this falls to under 6 hours per week. In comparison,

18-24-year-olds spend almost 10 hours per week gaming. Interestingly, whilst weekly gaming penetrations decline sharply for the over 55s, among those who do play, average time spent gaming per week still averages 8 hours. This shows that in-gaming advertisers can benefit from high levels of potential exposure among gamers of all ages.

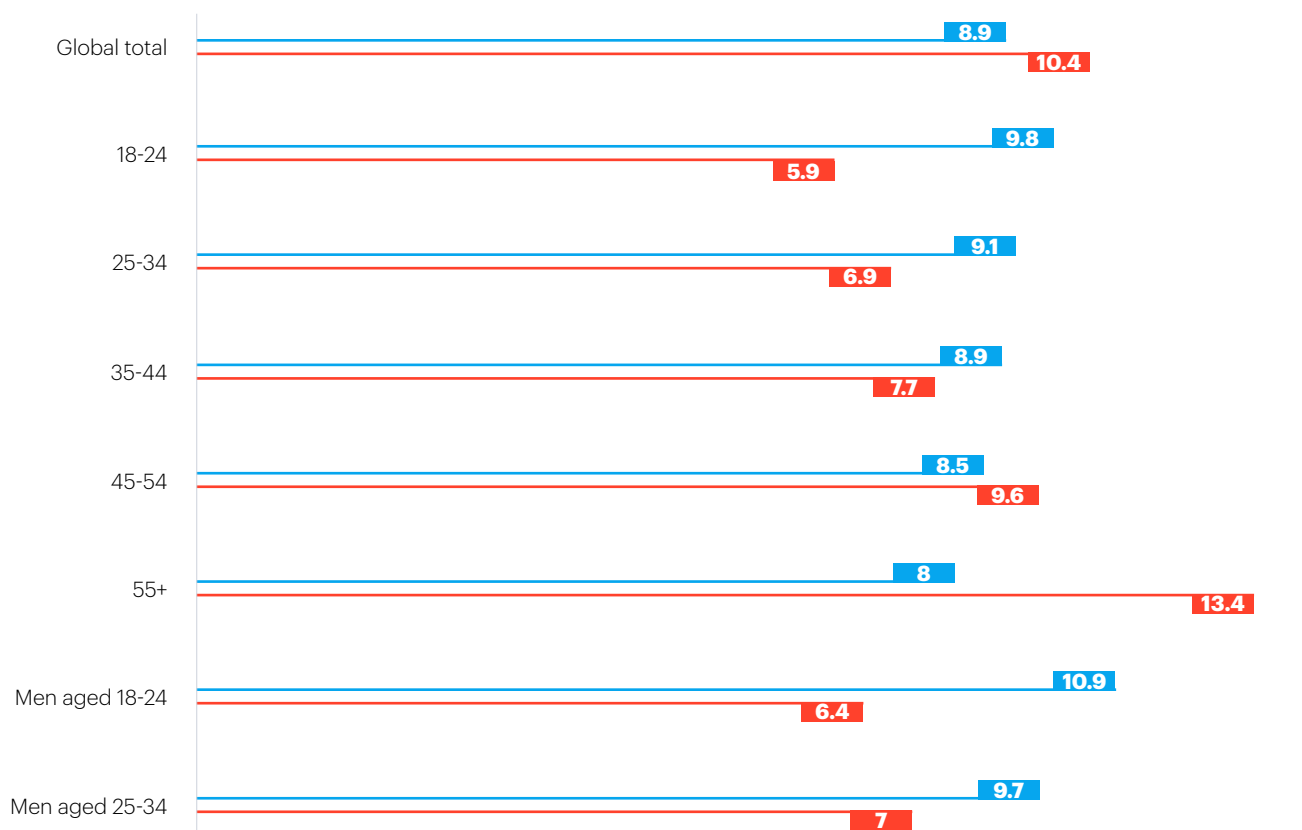
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Average time spent per week gaming and watching live TV – Global by age

Average hours per week



Average hours per week



Time playing video games



Time spent watching live TV

Q. In a typical week, how much time, if any, do you spend watching live TV? (watch programs at the time that they are broadcast i.e., not streaming)

Q. In a typical week, how much time, if any, do you spend playing video games on console, PC, mobile phone, or any other handheld device?

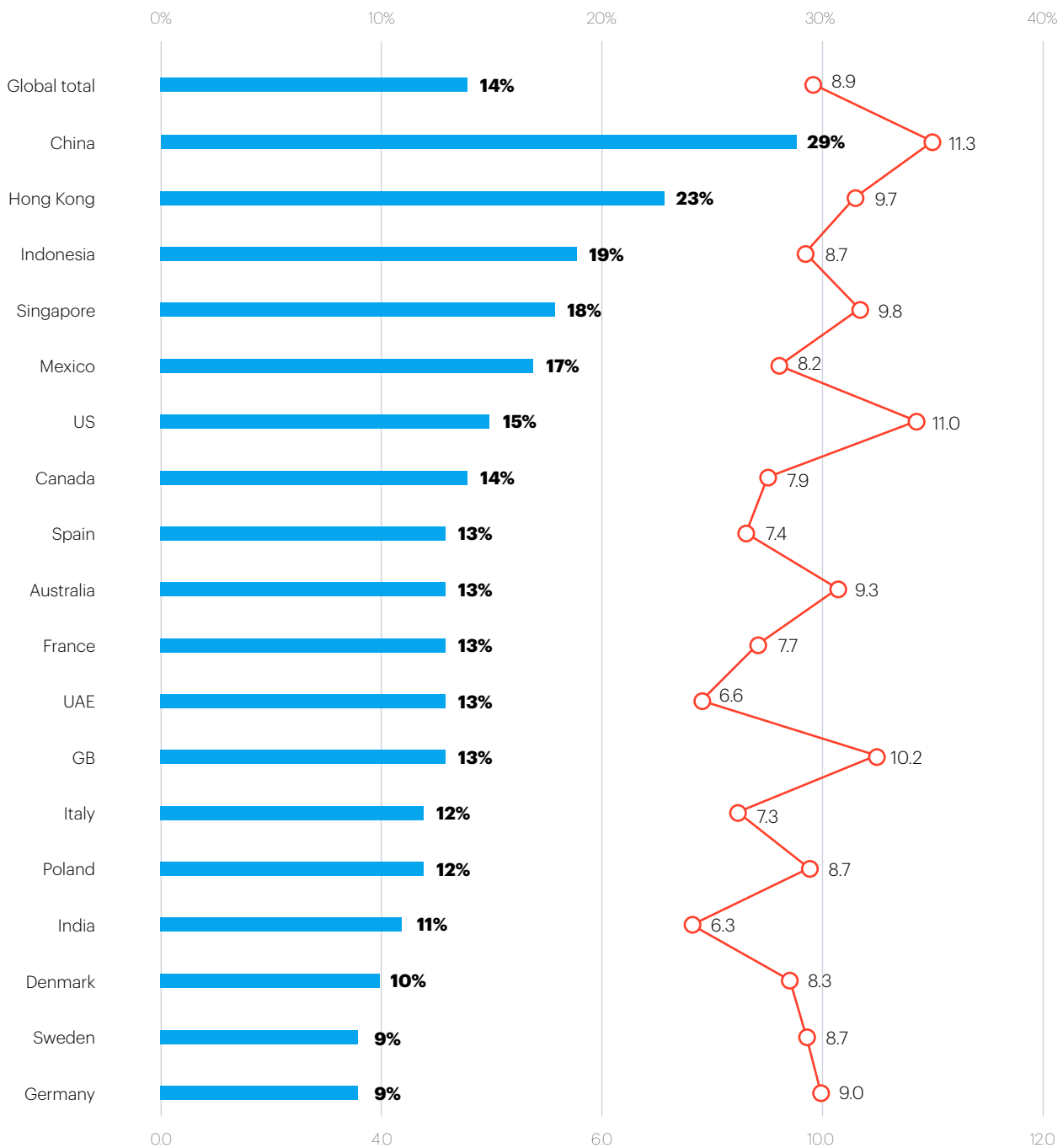
China's gamers lead the charts on most time spent gaming

China remains the biggest market for gaming. Out of the list of twelve media activities, three in ten (**29%**) Chinese consumers claim to spend most of their time gaming each week. Other Asian markets registering a high proportion of engaged weekly gamers include Hong Kong (**23%**), Indonesia (**19%**) and Singapore (**18%**). The proportion of adults who claim to spend most of their time gaming compared to other media activities is lower in the European markets. China also has the highest average number of hours played each

week among gamers at 11.3 hours, which is more than two hours higher than the global average of 8.9. Other countries where the average number of gameplay hours surpasses the global average to be more than 10 hours per week, includes the US and Great Britain. Whilst the proportion of Brits and Americans that claim to play most often compared to other media activities is almost on a par with the global total, those who do play are gaming for longer.

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Spend the most time on gaming and average time spent per week gaming – Global

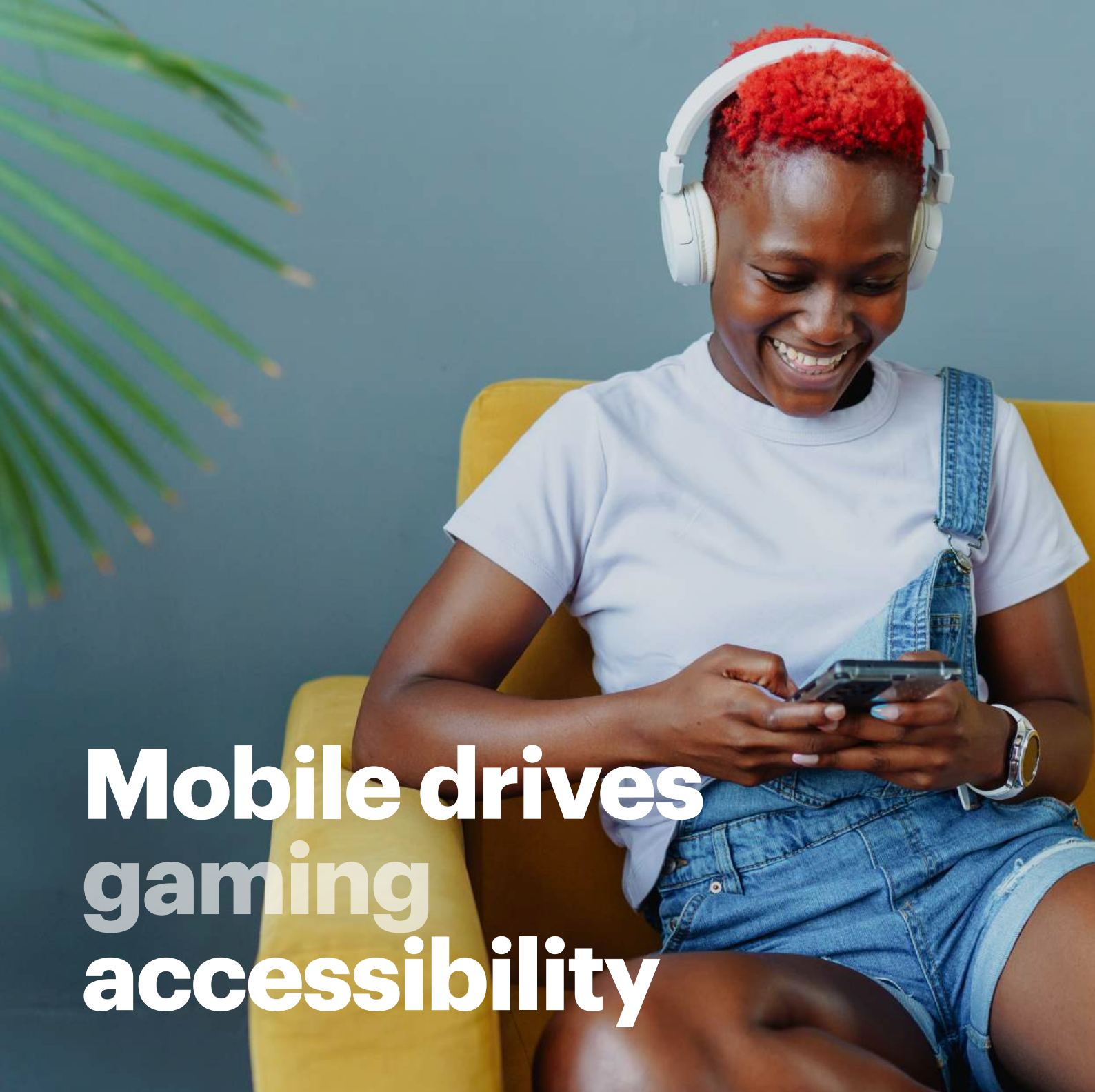


● Play video games most often ● Average number of hours game per week

Q: Which three activities would you say you spend the **most** time on in each week?

Q: In a typical week, how much time, if any, do you spend playing video games on console, PC, mobile phone, or any other handheld device?

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Mobile drives gaming accessibility

The accessibility of gaming has exploded with the rise of mobile. Enabling 'anywhere, anytime' access, smartphones are the top device used for playing video games among weekly gamers (**64%**) and those who game most often in a week (**63%**). Desktop/laptops follow smartphones as the most used gaming device. Whilst mobile devices have opened the gates to casual gaming in a big way, the likes

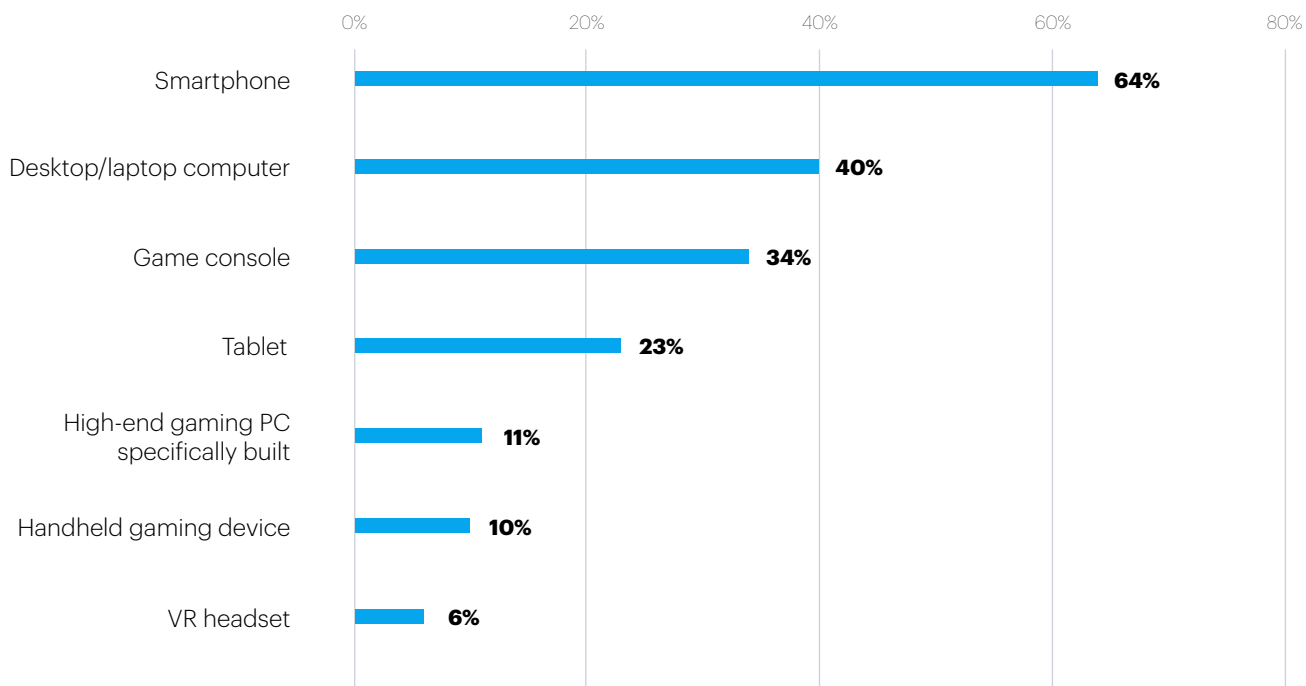
of Xbox and PlayStation continue to appeal to gaming enthusiasts with a third (**34%**) of weekly gamers using dedicated gaming consoles to play video games. Despite the gaming potential of VR and the steady rise of the metaverse, the adoption of VR headsets remains low, with only **6%** weekly gamers using VR headsets during their gaming sessions.

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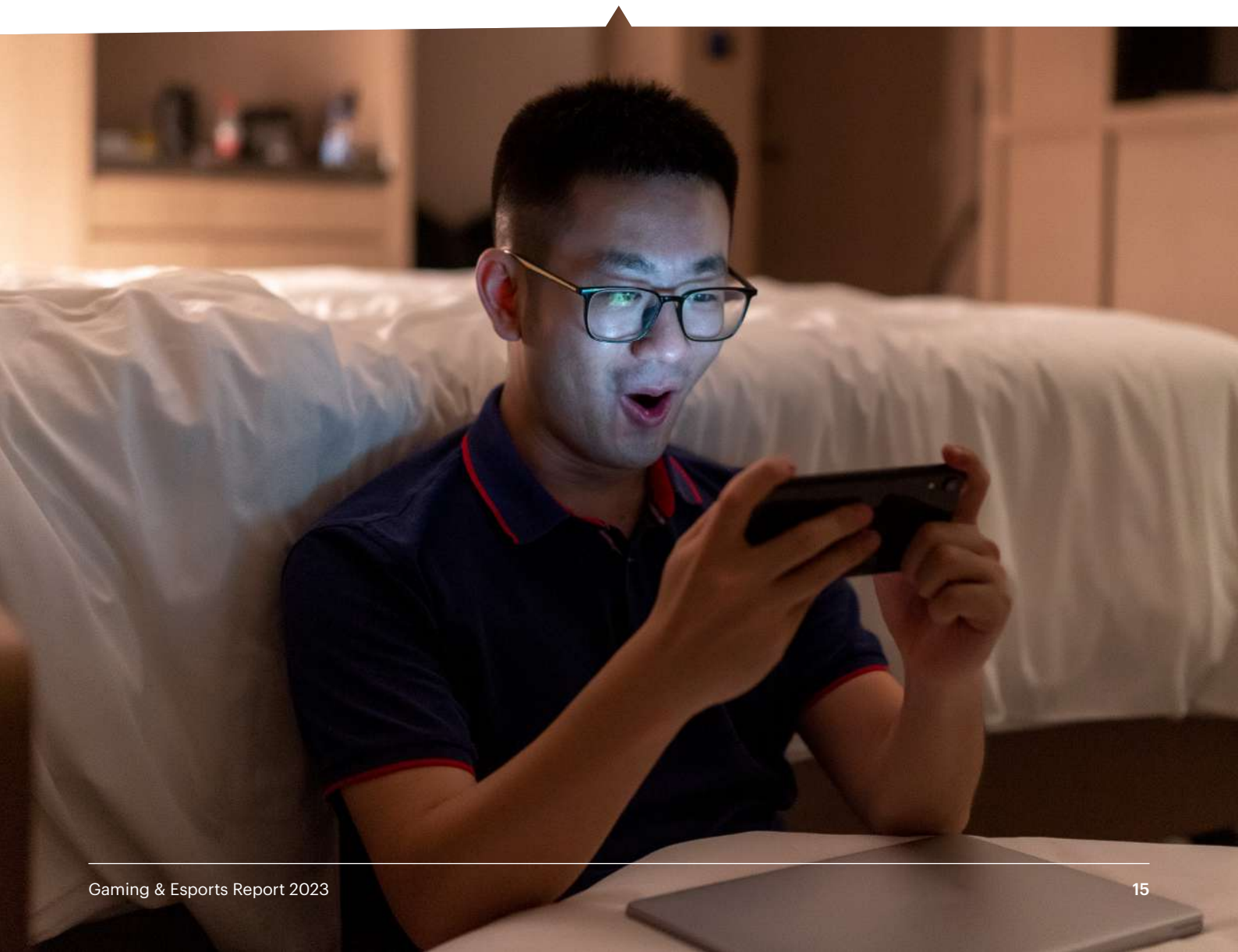
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Devices used for playing video games among weekly gamers - Global



Q: On which of the following devices do you typically play video games?





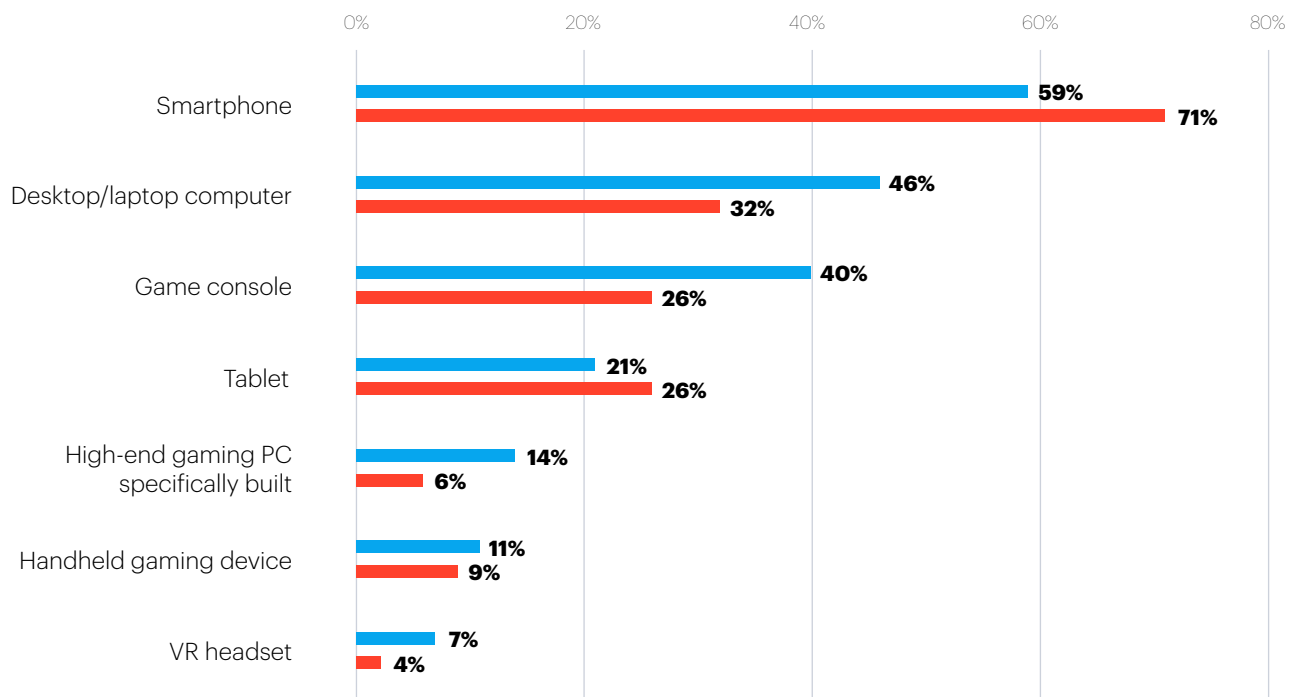
Seven in ten female gamers play video games on their smartphones

How global consumers interact with video games can provide insights into how the gaming sector may evolve. The mobile gaming sector is booming, and an increase in the number of games available via the App Store, coupled with advancements in graphics, and the improved gaming experience on a mobile device is fuelling this growth. Interestingly, women are much more likely to play video games on mobile devices than men (**71% vs. 59%**).

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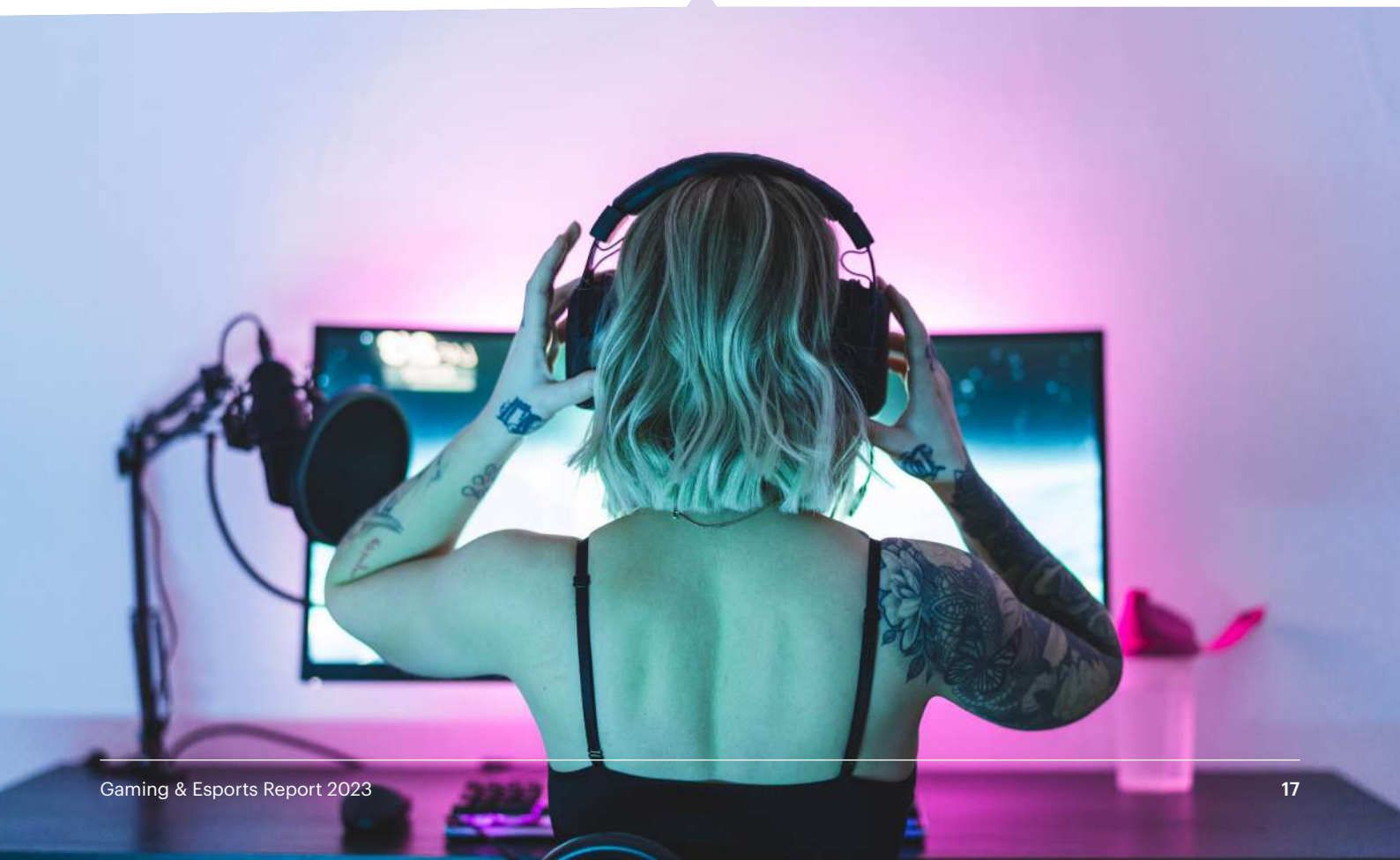
As hardcore gaming remains male-dominated, dedicated, higher power devices such as desktops/laptops, consoles and high-end gaming PCs are used more by men than women. We have already seen that **28%** of women globally play video games at least once a week, and with the growth in mobile gaming, we are likely to see gaming penetrations among women continue to grow in the coming years.

Devices used for playing video games among weekly gamers – Global by gender



● Male ● Female

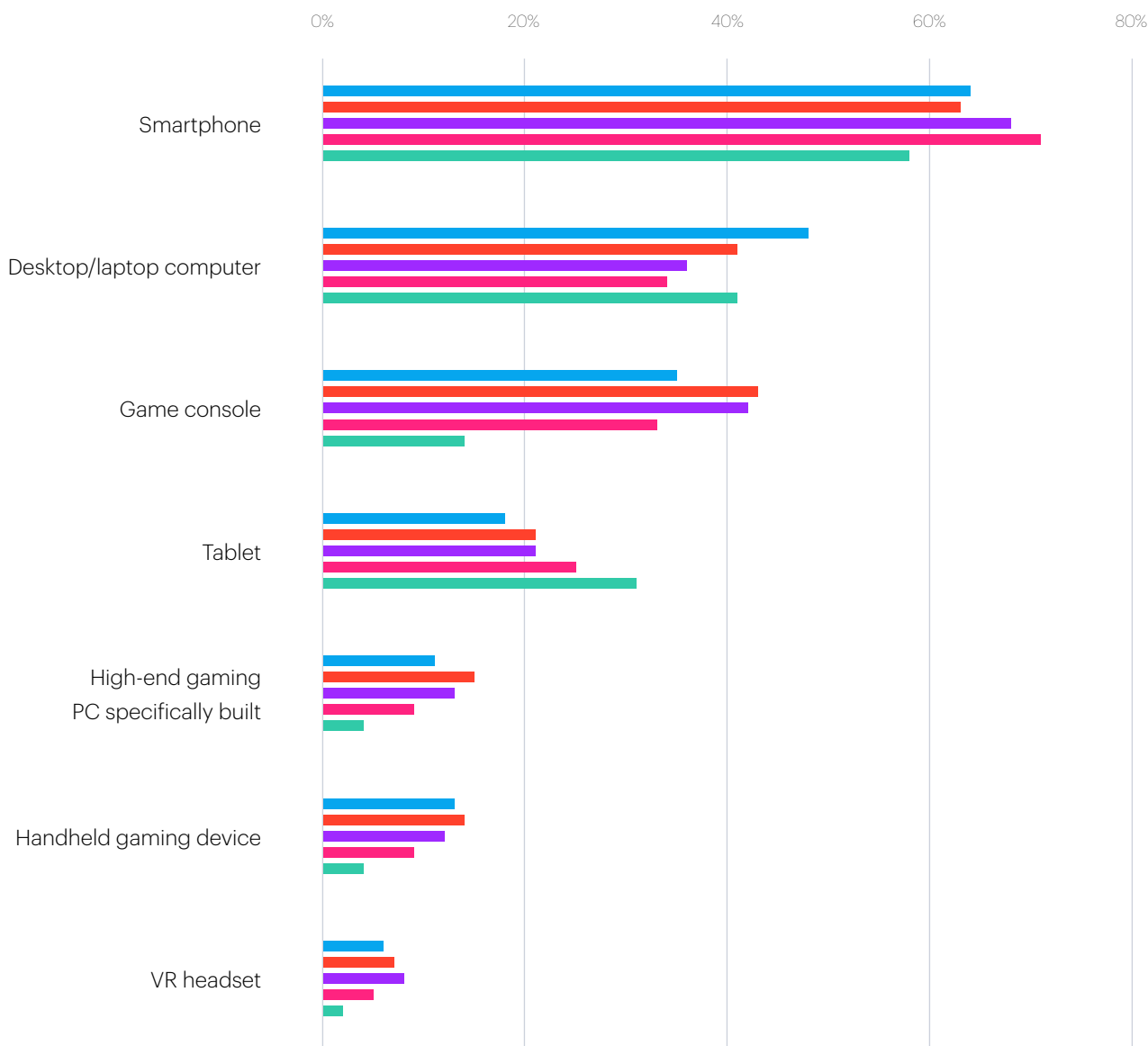
Q: On which of the following devices do you typically play video games? Please select all that apply. Base: Those who game weekly



Looking at the data by age, the smartphone is the dominant gaming device among weekly gamers of all ages. Those aged 35-44 and 45-54 are slightly more likely to use their smartphones to game, which could be attributed to the types of games played by among gamers in these age groups. Global gamers aged 25-44 are more likely to play games on consoles, whilst those aged 18-24 are more likely to turn to their desktop/laptop computer.

Tablets make it easier for older consumers to read, and interact with on-screen content, consequently, global consumers aged over 55 are more likely to use tablets for gaming than those in other age groups. In addition, there is a growing number of puzzle and memory-based games that are particularly appealing to older generations that are easily accessible via the Apple or Google Play store.

Devices used for playing video games among weekly gamers – Global by age



● 18-24 ● 25-34 ● 35-44 ● 45-54 ● 55+

Q: On which of the following devices do you typically play video games? Please select all that apply.

Base: Those who game weekly

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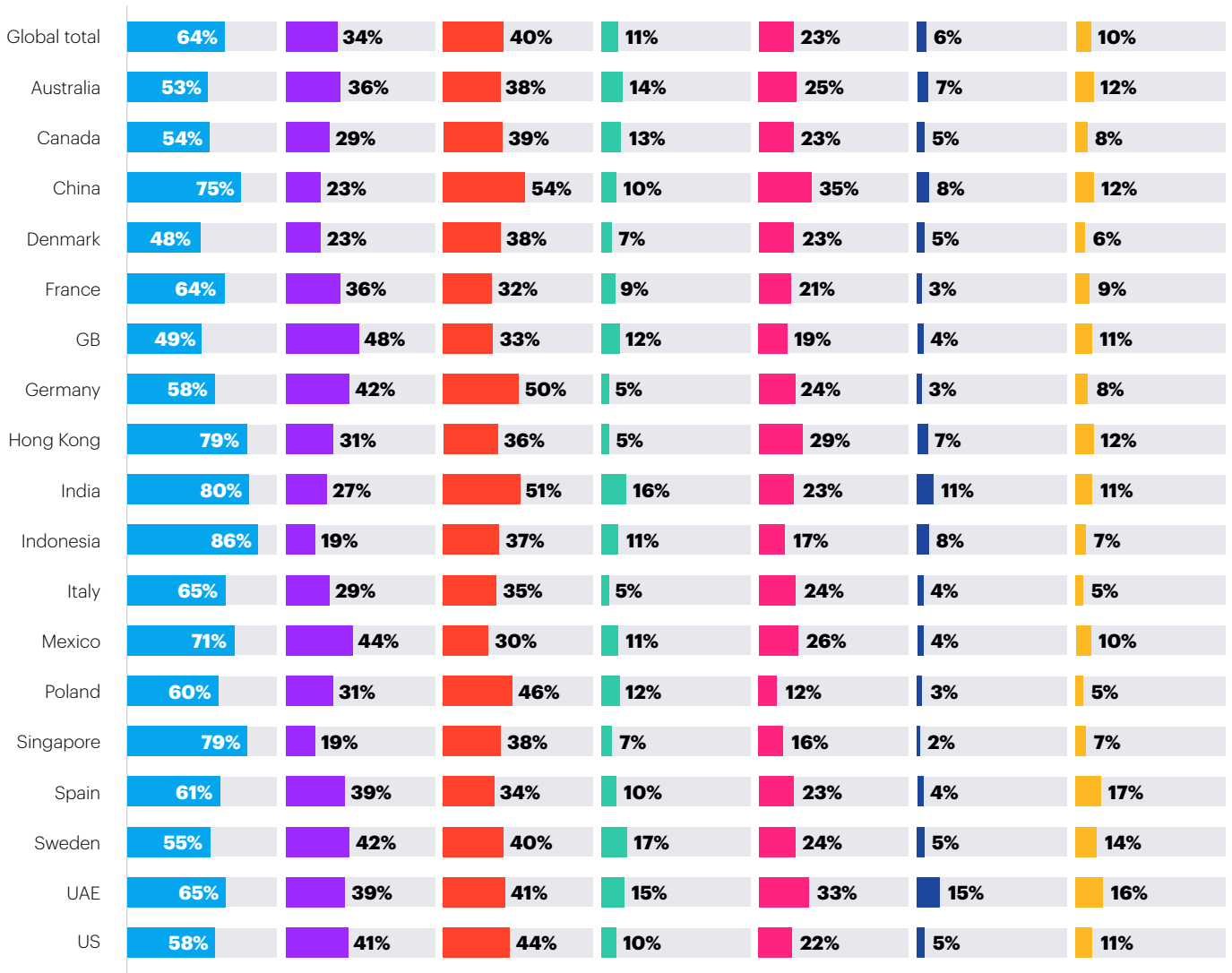
Indonesia houses the highest proportion of smartphone gamers








In all markets, the smartphone is the preferred device for gaming. Affordability coupled with continuous tech improvement make smartphones a go-to gaming device in younger, mobile-first Asian markets with Indonesia and India registering the highest proportion of smartphone weekly gamers. Whilst China and India are the two leading gaming markets for desktop/laptop gamers, higher proportions of

console weekly gamers are from North America and Europe. Notably, Great Britain has the highest percentage of users, with an almost equal proportion playing video games on consoles (**48%**) as those who use smartphones (**49%**). Other leading markets for console gaming included Mexico, Sweden, and Germany.

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Devices used for playing video games among weekly gamers – by country



-  Smartphone
-  Game console
-  Desktop/laptop computer
-  High-end gaming PC specifically built
-  Tablet
-  VR headset
-  Handheld gaming device

Q: On which of the following devices do you typically play video games? Please select all that apply.

Base: Those who game weekly

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Section 2

Connecting with gamers

In today's media landscape, a burgeoning digital ecosystem surrounds gaming and keeps gamers highly engaged.

YouGov Research reveals that gamers are more likely to form positive views about products if they advertised on platforms that underpin this gaming ecosystem, including social and streaming platforms.



Impact of advertising platforms on perceptions of products and services

As a key engagement channel, social media is the top ad platform to drive positive product perceptions among global weekly gamers (**31%**). Whilst social media ranks as one of the top advertising platforms amongst younger weekly

gamers aged 18-24, advertising on video games jumps from 7th position amongst all weekly gamers to third, and to 5th position among 25-34 year old weekly gamers, highlighting the deep engagement with this audience.

As a popular past time, global consumers are engaging with games and gaming platforms in more ways than before. Gaming engagement doesn't just include playing games, it encompasses viewing gaming content, socializing, and hanging out in game worlds through communities.

As the gaming sector continues to reach a diverse and engaged global audience, brands are increasingly keen to use video games as marketing vehicles either through sponsorship, partnerships, or in-game advertising.

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Gamers have a deeper connection with brands and advertisers

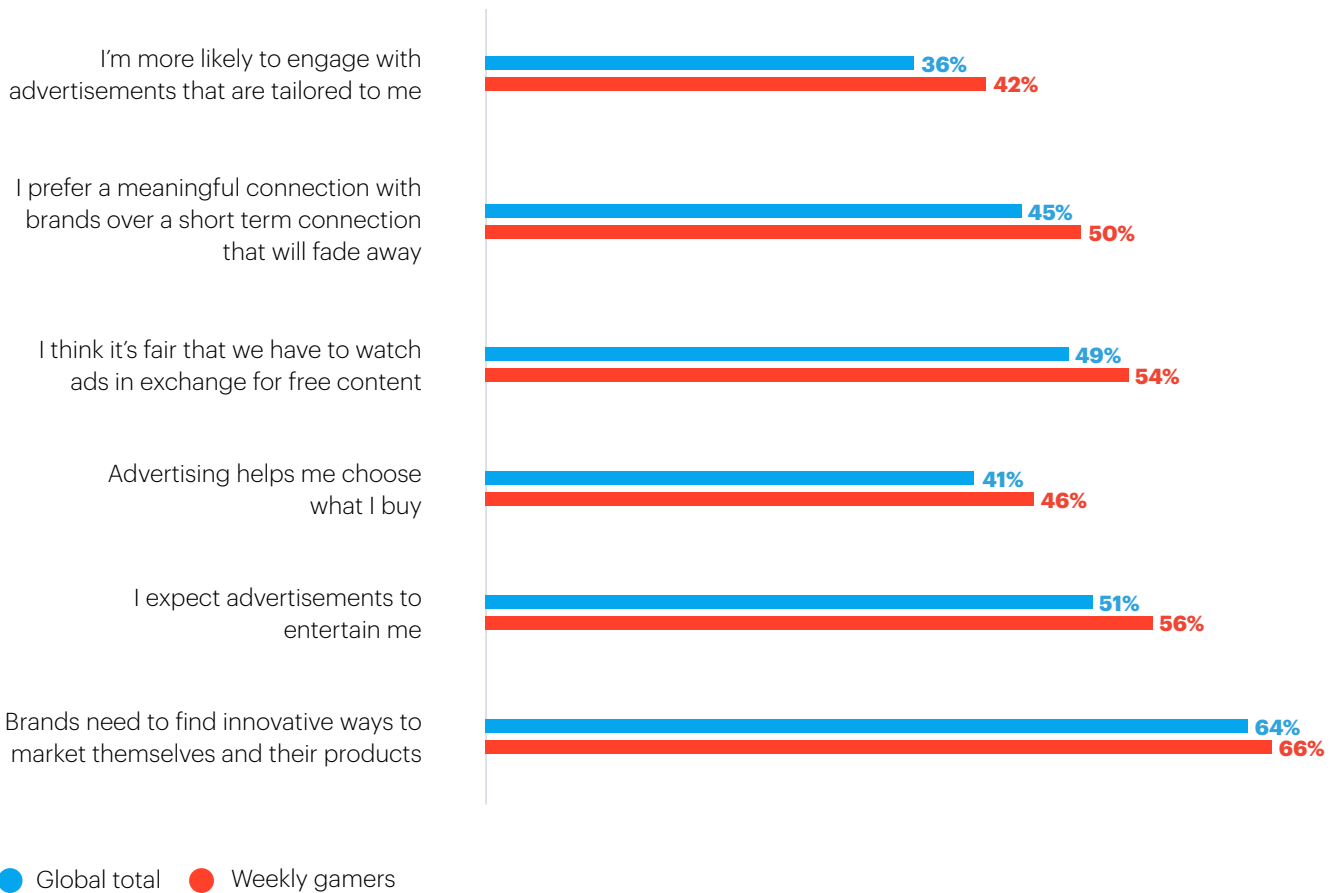
Focussing on **in-game advertising**, where brands place images or videos within a game as gamers immerse themselves in new worlds, what types of in-game advertising resonates with this super engaged audience?

Turning to **YouGov Global Profiles** data we explore the relationship gamers have with advertising and brands across 43 markets. Whilst **45%** of all global adults would prefer a deeper, more meaningful connection with brands rather than a fleeting one, this increases to **50%** among those who are gaming more than an hour a week. Global weekly gamers are also more likely to engage with advertisements that are

more tailored to them than the global average (**42%** vs. **36%**), enabling them to build a relationship with brands that are relevant to them. In addition, global weekly gamers have a higher receptiveness to advertising than the global average. **54%** agree that it's fair to watch ads in exchange for free content, compared to **49%** of the global population. They also place high value in paying for gaming add-ons, such as extra lives, coins and weapons, or access to unlock new levels via in-game purchases. The trade-off of an in-game transaction appeals to more than four in ten (**43%**) who would opt for the purchase in exchange for improving their game performance.

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Net agreement (Definitely agree/tend to agree) with statements about advertising - by global total and weekly gamers, globally.





Inspire and entertain me

As a captive and diverse audience, brands and advertisers need to find unique and different ways to grab gamers' attention and encourage them to purchase.

YouGov Global Profiles data shows that two thirds of global weekly gamers want brands to find innovative ways to market themselves and their products. **56%** also expect adverts to entertain them, compared to **51%** of the global population.

It is important for advertisers and brands to strike a balance in creating ads that not only complement the gameplay, but also achieve stand out and memorable commercials. The gaming audience is receptive to advertising, with **46%** of global weekly gamers agreeing that advertising helps them decide what to buy, compared to **41%** among the global population. If an ad is relevant, engaging, and entertaining, it will encourage a positive relationship with a brand, and potentially encourage a purchase.

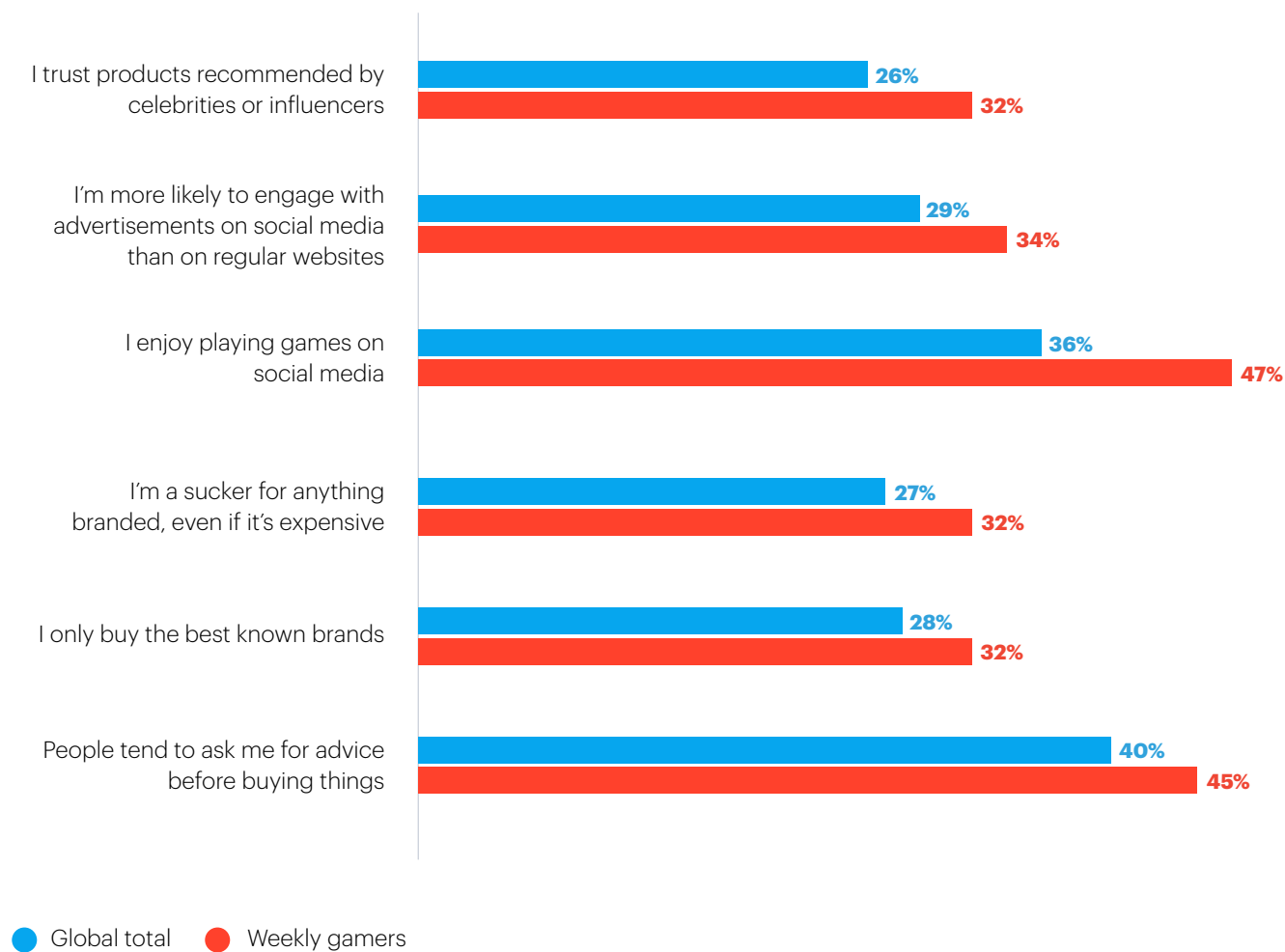


The social connection

The gaming ecosystem goes beyond just gaming with the social interaction of gaming as important for many gamers who like to share or discuss their experiences with each other. Being part of gaming communities, following influencers and streamers, socializing in virtual game worlds, and watching gaming content are all vital elements of the enjoyment of gaming. Social media plays a key role in gamers lives as they

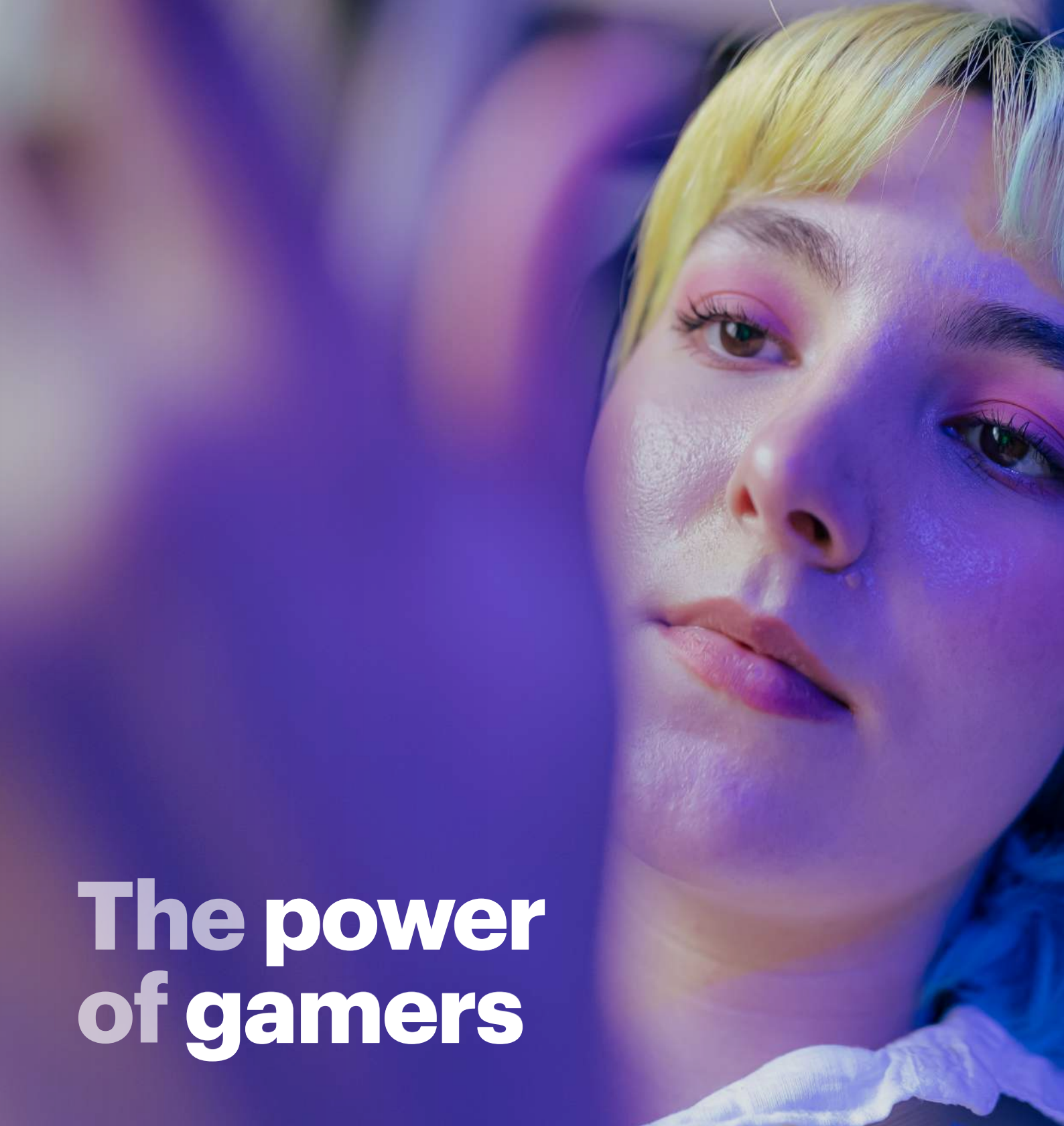
not only enjoy playing games on social media, but they are also more likely to engage with ads on social than on regular websites. In addition, brands are aligning themselves with streamers and influencers as ambassadors of their brands and a third of gamers globally (**32%**) trust products recommended by celebrities and influencers.

Net agreement (Definitely agree/tend to agree) with statements about social media and influencers - by global total and weekly gamers, globally.



Source: **YouGov Global Profiles**





The power of gamers

Given the deep connection gamers have with their peers they not only share their gaming stories. They want to be aligned to the best-known brands and their fellow gamers seek their advice, making them powerful adversaries for brands

to partner with. The union of gaming, social engagement and connectivity presents huge opportunities for brands to connect with this audience in a meaningful way.

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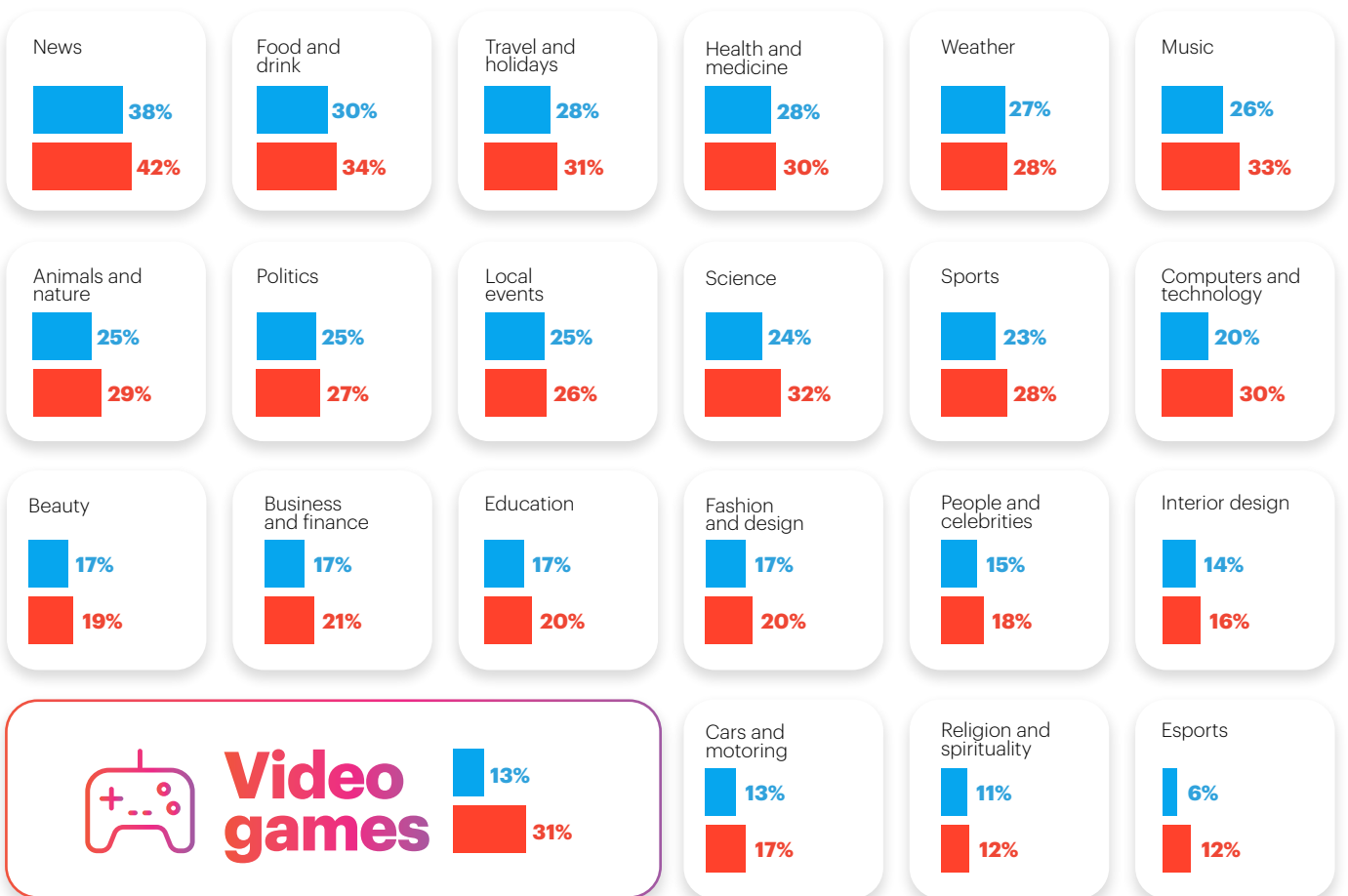
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Gamers have diverse interests

Gamers have a wide variety of interests beyond gaming, offering a major opportunity for all types of brands to reach this hyper-connected audience. **YouGov Research** reveals the most popular topics that weekly gamers would click on if they popped up on their news include news (42%) food and drink (34%), music (33%), science (32%), travel and holidays (31%) and computers and technology (30%). Whilst they align with the global total for the top two interests' news and food

and drink, they are considerably more likely than the global total to engage with music, sports, science, computers and technology, esports and video games on their news feeds. In fact, they have a higher propensity to connect with all topics compared to the global consumer. The wide range of interests among gamers presents key cross-collaboration opportunities for brands and marketers to enrich connection and engagement with their target gaming audience.

News feed topics global consumers and weekly gamers likely to click on



● Global total ● Weekly gamers

Q: Which, if any, of the following topics would you be likely to click on if it popped up on your news feed?



Different interests for different gamers

The demographics of gamers are more diverse today – comprising of more women and adult gamers with varied lifestyles. Driven by their ways of life, gamers are interested in a wide range of topics apart from video games. To effectively connect with gamers, brands need to identify and understand the gaming audiences and the nuances between gamers of different demographics.

As highlighted earlier, news ranked as the top topic amongst weekly gamers and global consumers alike and amongst male weekly gamers and gamers aged 35+. However, among

the youngest gaming cohort (aged 18-34) news is replaced with video games as the most popular topic of interest. The passion for music increases among 18-24 weekly gamers along with computers and technology. Food and drink enthusiasm ranks in the top five for weekly gamers from 18 to 44 and is the favourite topic for female gamers. Sports ranks higher for male gamers and those aged 45-54. Whereas travel and holidays has higher appeal for female gamers and those aged 45-54. Strategies to interact with gamers must reflect the nuances of gamers’ preferences, and demographics to be effective.

Top five news feed topics weekly gamers likely to click on by demographics

Rank	1st	2nd	3rd	4th	5th	Video games rank
All weekly gamers	News	Food and drink	Music	Science	Video games	5th
Aged 18-24	Video games	Music	Computers and technology	Food and drink	Science	1st
Aged 25-34	Video games	Food and drink	Music	News	Science	1st
Aged 35-44	News	Food and drink	Video games	Computers and technology	Music	3rd
Aged 45-55	News	Science	Music	Sports	Travel and holidays	13th
Aged 55+	News	Weather	Health and medication	Local events	Politics	20th
Male	News	Computers and technology	Video games	Sports	Science	3rd
Female	Food and drink	News	Health and medication	Animals	Travel and holidays	16th

Q: Which, if any, of the following topics would you be likely to click on if it popped up on your news feed?

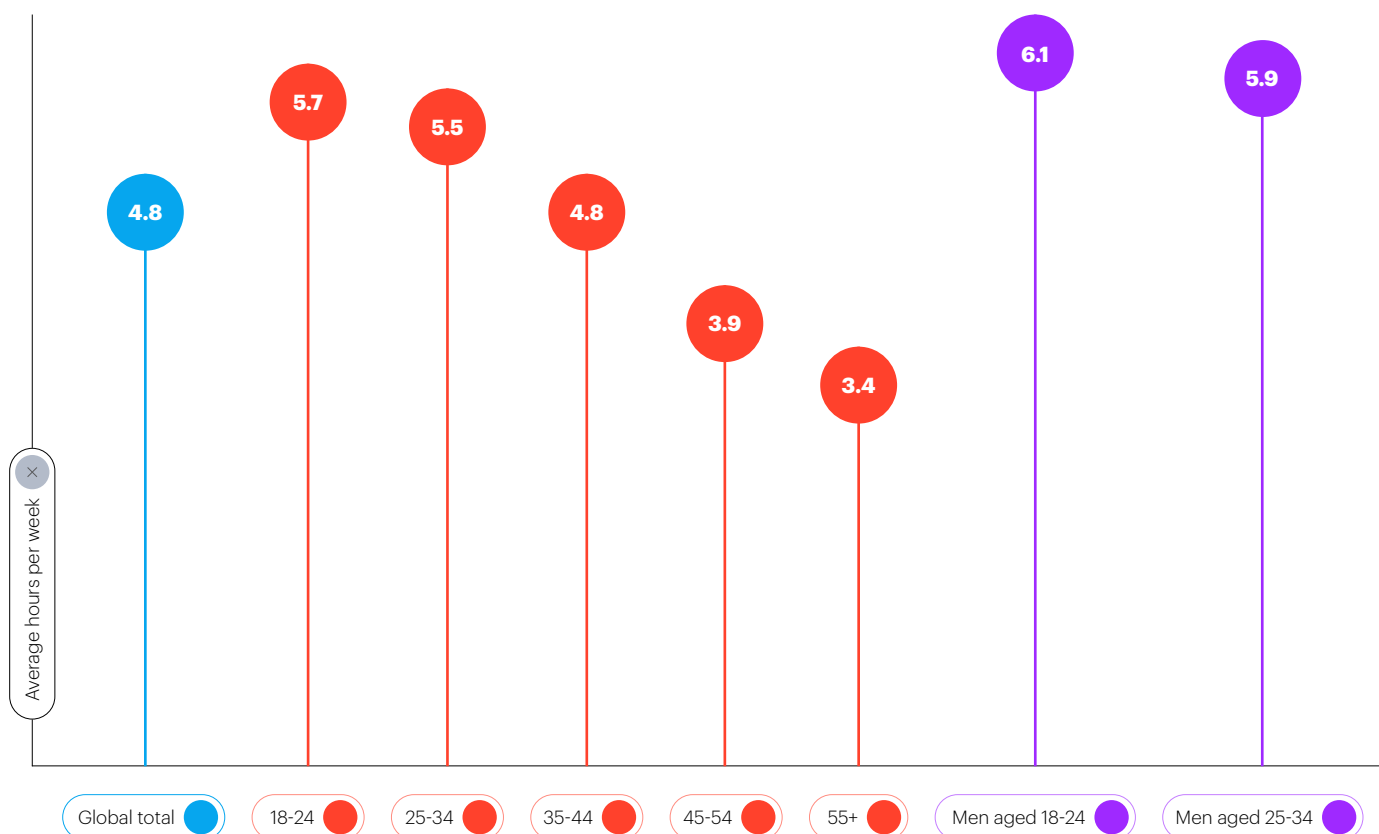


High engagement with gaming content

Along with gaming they also have high levels of engagement in watching video content relating to games. On average, global viewers spend 4.8 hours per week, watching gaming video content. This increases to 6 hours per week amongst

men aged 18-24 and men aged 25-34, and over 5 hours amongst under 34's. This shows a highly captive and receptive audience opportunity for brands and advertisers aligning themselves with content relating to video games.

Time spent watching video content specifically related to video games

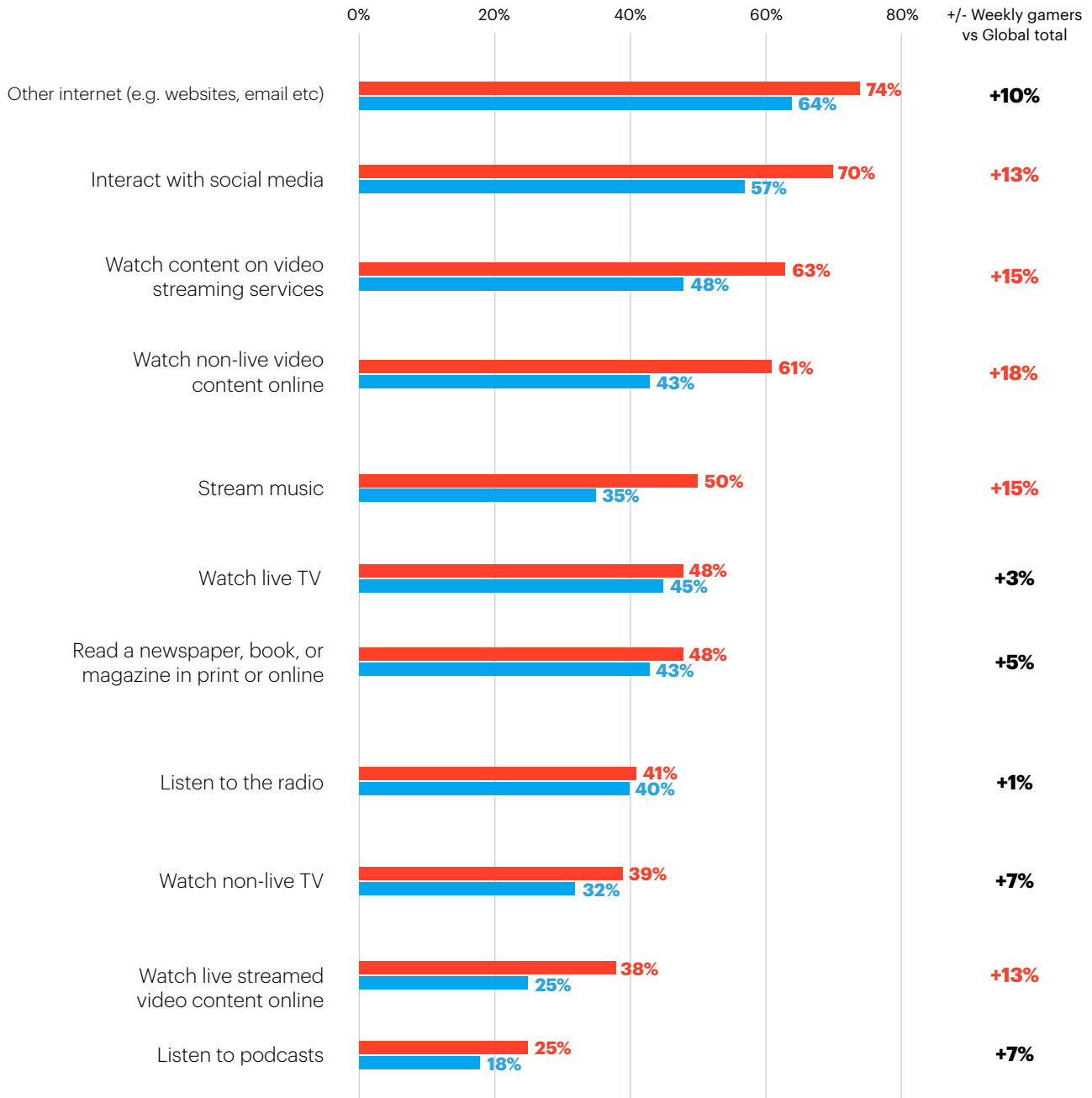


Exploring gaming synergies

For advertising planners and marketers considering gaming advertising in the media mix, it is important to explore media synergies, and look at other media types consumed by gamers. When we profile the global weekly gamer, **YouGov Research** shows that gamers are more likely to consume all media types, than the global total. However, media types

where their behavior differs compared to the global total and they have a higher engagement and connection with are, live and non-live video content, streaming music and video and social media (+13% pts or more versus global total). Whereas for traditional media such as listening to the radio or watching live TV there is minimal variation compared to the global total.

Media activities undertaken in a typical week, global total compared to weekly gamers



● Global Total ● Weekly gamers

Q: Which, if any, of the following do you typically do on a weekly basis?



Gaming enhances media reach

Marketers considering in-gaming advertising and sponsorship options, must consider the gaming audience in the context of other media and assess which media combinations may deliver the highest net reach of consumers, and also which will deliver the greatest overlap – providing potential advertisers the opportunity to reinforce their message using different media channels.

Interesting insights emerge when we look at media activities undertaken in a typical week and the increased uplift that gaming can add when combined with those playing video games. In particular, there are clear synergies between

gaming and other digital media and **YouGov Research** data shows that whilst **57%** of global consumers interact with social media on a weekly basis, if we look at those who either interact with social media, or engage in gaming on a weekly basis, this reach increases to **67%**. Adding gaming to traditional media, also provides incremental benefits in reach, for example, **40%** of the global population listen to the radio on a weekly basis, and this increases to **58%** of those who either listen to the radio or play games on a weekly basis (**+18%** uplift). So, for an advertiser, including gaming on a media plan, can extend the brand reach of a campaign.

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Media activities undertaken in a typical week and media activity with playing video games - Global

	Weekly reach	+Gaming net weekly reach	Incremental weekly reach media +Gaming
Play video games on console, PC, mobile phone or any other handheld device	31%	-	-
Other internet (e.g. websites, email etc)	64%	72%	+8%
Interact with social media	57%	67%	+10%
Watch content on video streaming services	48%	60%	+12%
Watch live TV	45%	61%	+16%
Watch non-live video content online	43%	56%	+13%
Read a newspaper, book, or magazine in print or online	43%	59%	+16%
Listen to the radio	40%	58%	+18%
Stream music	35%	51%	+16%
Watch non-live TV	32%	51%	+19%
Watch live streamed video content online	25%	45%	+20%
Listen to podcasts	18%	41%	+23%

Q: Which, if any, of the following do you typically do on a weekly basis?

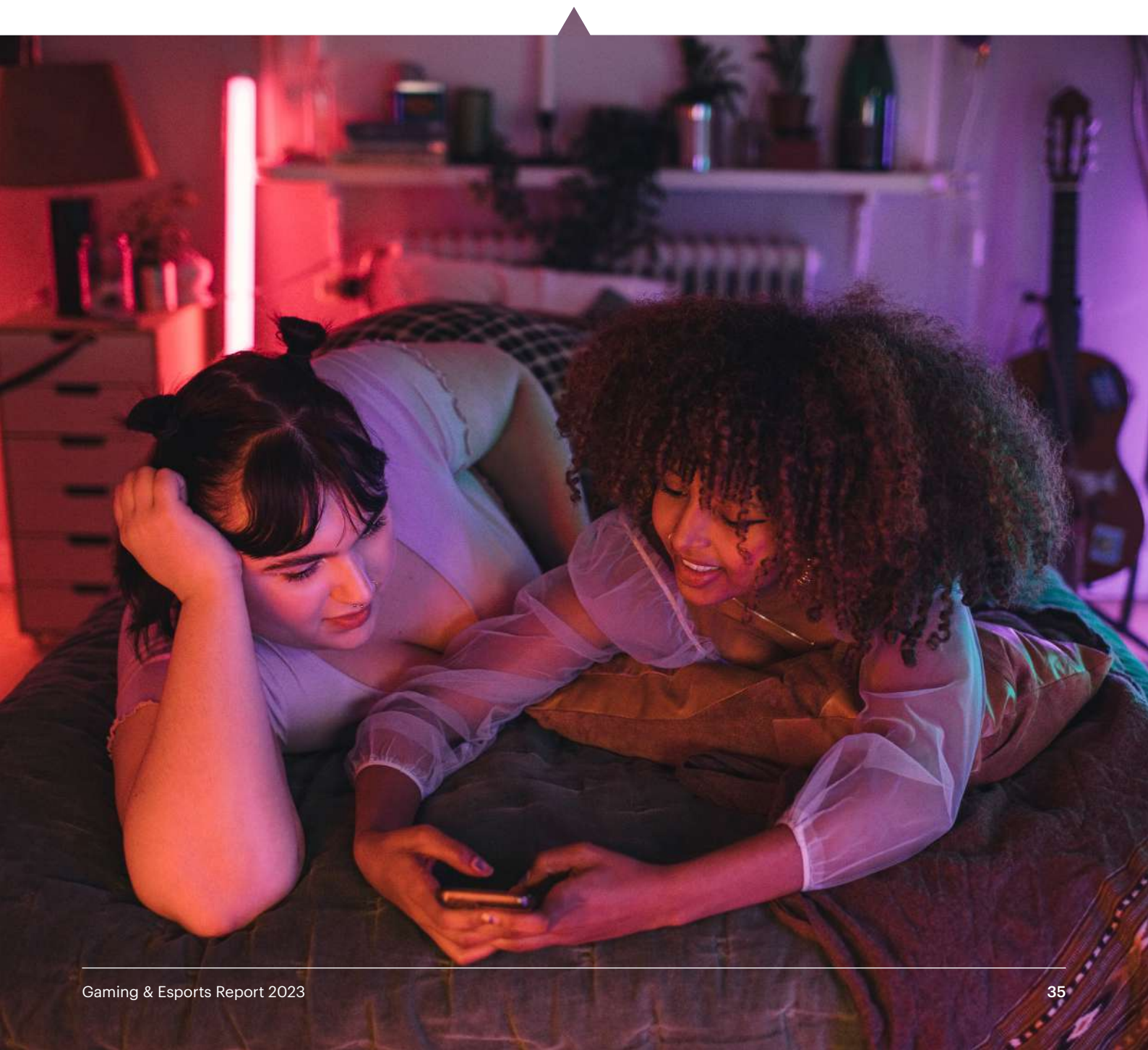
Different media types provide opportunities to expand the possible ways consumers can process the campaign exposure. By using media combinations where the overlap with gaming in terms of weekly consumption is high,

this presents an opportunity for gaming advertisers and sponsors, not only to reinforce their advertising message, but to deliver this message in different ways which heightens the long-term processing of the campaign in memory.

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Summary

In connecting with gamers, brands and advertisers need to understand this highly engaged and receptive audience. They form positive attitudes towards advertising that creates a more meaningful deeper bond, is tailored to them and is entertaining. With high levels of social interaction, gamers like to share their experiences and the brands that resonate with them, making them an attractive and influential target. While gamers have a diverse range of interests' brands will need to understand and reflect the nuances between different gaming demographics to ensure brands cut through and resonate with the right gaming audience. Marketers will need to understand gaming in the media mix and identify where the best synergies lie to reinforce their messages through the right channels.



Data

The insights in this report are drawn from a recent global YouGov Survey to understand the changing media and entertainment industry landscape, how consumers are engaging with non-traditional and digital media channels, and where gaming fits as part of this picture; engagement with gaming, the relationships gamers have with advertising and how best to connect with global gamers.

Our research covers 18 global markets of more than 19,000 respondents. The survey results were further bolstered by connecting respondent level YouGov Research data to YouGov's proprietary syndicated data solution for the gaming & esports industry specifically.

Our survey was fielded from the 18th July 2022 to 4th August 2022. The YouGov panel provides a naturally accurate and representative view of the population. Data is adjusted with mild weighting using interlocking demographic characteristics. For this report the following population representation was used:

Region	Market	Sample type	Sample Size (n=)
North America	US	National representative	1550
	Canada	National representative	1014
	Mexico	National representative (urban focus)	1062
Europe	GB	National representative	2082
	France	National representative	1007
	Germany	National representative	1068
	Spain	National representative	1014
	Denmark	National representative	1023
	Italy	National representative	1030
	Poland	National representative	1007
	Sweden	National representative	1019
APAC	Australia	National representative	1052
	China	National online	1043
	Hong Kong	National online	515
	Indonesia	National online	1050
	India	National representative (urban focus)	1022
	Singapore	National representative	1059
MEA	UAE	National representative	1130

Discover living data

Speak to sales

Launch a survey

Thank you

YouGov is an international research, data and analytics group. We have been building an ever-growing source of consumer data for over **20** years, creating the richest and most complete understanding of your customers' complex lives. We call it living data. Understand what **24 million+** registered panel members in over 55 markets are thinking, on over a million - and growing - data points. Re-Contact and dig deeper to explore, plan, activate and track marketing activity with certainty, at speed, every time. Living Consumer Intelligence.

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