globalwebindex

Gaming personas

An audience profile on the digital attitudes and behaviors of six gamer types

AUDIENCE REPORT 2020

globalwebindex.com

What's inside?

METHODOLOGY

All figures in this report are drawn from GlobalWebIndex's online research among internet users aged 16-64. We only interview respondents aged 16-64 and our figures are representative of the online populations of each market, not its total population. Note that in many markets in Latin America, the Middle East and Africa, and the Asia Pacific region, low internet penetration rates can mean online populations are more young, urban, affluent and educated than the total population.

Each year, GlobalWebIndex interviews over 688,000 internet users aged 16-64 via an online questionnaire for our Core dataset. A proportion of respondents complete a shorter version of this survey via mobile, hence the sample sizes presented in the charts throughout this report may differ as some will include all respondents and others will include only respondents who completed GlobalWebIndex's Core survey via PC/laptop/tablet.

Throughout this report we refer to indexes. Indexes are used to compare any given group against the average (1.00), which unless otherwise stated refers to the global average. For example, an index of "1.20" means that a given group is 20% above the global average, and an index of "0.80" means that an audience is 20% below the global average.

Introducing the gamers

Mobile-Only

29%

45% Male | Female 55% | Top country Israel

Most distinctive interest
Beauty/cosmetics

Most distinctive use of social media
To follow celebrities/celebrity news

Most distinctive brand advocacy motivation
Love for the brand

Most distinctive franchise preference
Bubble Witch

Devices used: smartphone or tablet | **Sample size:** 19,214
Other: does not use PC/laptop, handheld gaming device, games console

Casual Gamer

29%

61% Male | Female 39% | Top country Colombia

Most distinctive interest
Esports

Most distinctive use of social media
To watch/follow sports events

Most distinctive brand advocacy motivation
Access to exclusive content or services

Most distinctive franchise preference
Fallout

Devices used: games console or PC/laptop | **Sample size:** 18,886
Other: played or downloaded a free-to-play game in the last year

Esporter

26%

65% Male | Female 35% | Top country Philippines

Most distinctive interest
Adventure/extreme sports

Most distinctive use of social media
To watch/follow sports events

Most distinctive brand advocacy motivation
Access to exclusive content or services

Most distinctive franchise preference
Overwatch

Devices used: games console or PC/laptop | **Sample size:** 13,466
Other: watched a live gaming stream or esports tournament in the last year

Socializer

13%

60% Male | Female 40% | Top country Philippines

Most distinctive interest
Entrepreneurship

Most distinctive use of social media
To meet new people

Most distinctive brand advocacy motivation
Enhancing my online reputation/status

Most distinctive franchise preference
Defense of the Ancients (DotA)

Devices used: games console or PC/laptop | **Sample size:** 6,450
Other: played a game online with real-life friends or shared an image/video of gameplay online in the last year, and use the internet to make new connections

Cloud Gamer

12%

62% Male | Female 38% | Top country Brazil

Most distinctive interest
Adventure/extreme sports

Most distinctive use of social media
To promote/support charitable causes

Most distinctive brand advocacy motivation
Access to exclusive content or services

Most distinctive franchise preference
Defense of the Ancients (DotA)

Devices used: games console or PC/laptop | **Sample size:** 6,723
Other: played using a cloud gaming or streaming service in the last year

Influencer

3%

61% Male | Female 39% | Top country India

Most distinctive interest
Vegan food

Most distinctive use of social media
To promote/support charitable causes

Most distinctive brand advocacy motivation
Enhancing my online reputation/status

Most distinctive franchise preference
The Division

Devices used: games console or PC/laptop | **Sample size:** 1,659
Other: broadcast a gameplay stream and purchased an add-on or DLC

01

Gaming personas

Demographics

Demographic breakdown

Mobile-Only
29%
of global internet users are mobile-only gamers

% of mobile-only gamers are...
45% Male Female **55%**

Casual Gamer
29%
of global internet users are casual gamers

% of casual gamers are...
61% Male Female **39%**

Esporter
26%
of global internet users are esporters

% of esporters are...
65% Male Female **35%**

Socializer
13%
of global internet users are socializers

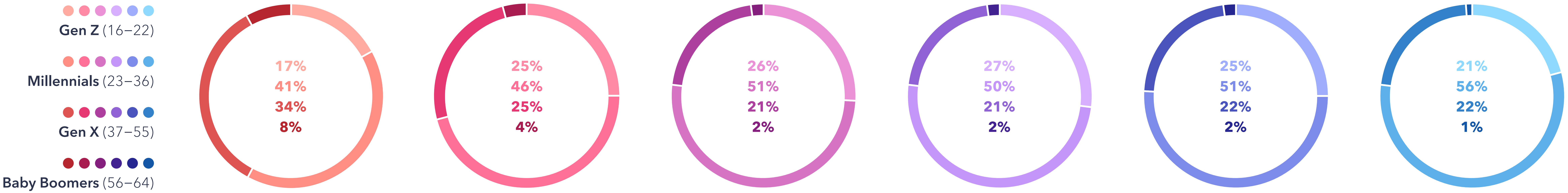
% of socializers are...
60% Male Female **40%**

Cloud Gamer
12%
of global internet users are cloud gamers

% of cloud gamers are...
62% Male Female **38%**

Influencer
3%
of global internet users are influencers

% of influencers are...
61% Male Female **39%**



	% of internet users who are mobile-only gamers by region	% of internet users who are casual gamers by region	% of internet users who are esporters by region	% of internet users who are socializers by region	% of internet users who are cloud gamers by region	% of internet users who are influencers by region
Asia Pacific	33%	27%	29%	15%	13%	4%
Europe	25%	31%	19%	8%	9%	2%
Latin America	21%	40%	29%	14%	16%	3%
MEA	32%	31%	22%	11%	11%	3%
North America	26%	28%	19%	8%	9%	3%

Source: GlobalWebIndex Q3 2019
Base: 44,160 total gamers aged 16-64

Fundamental differences

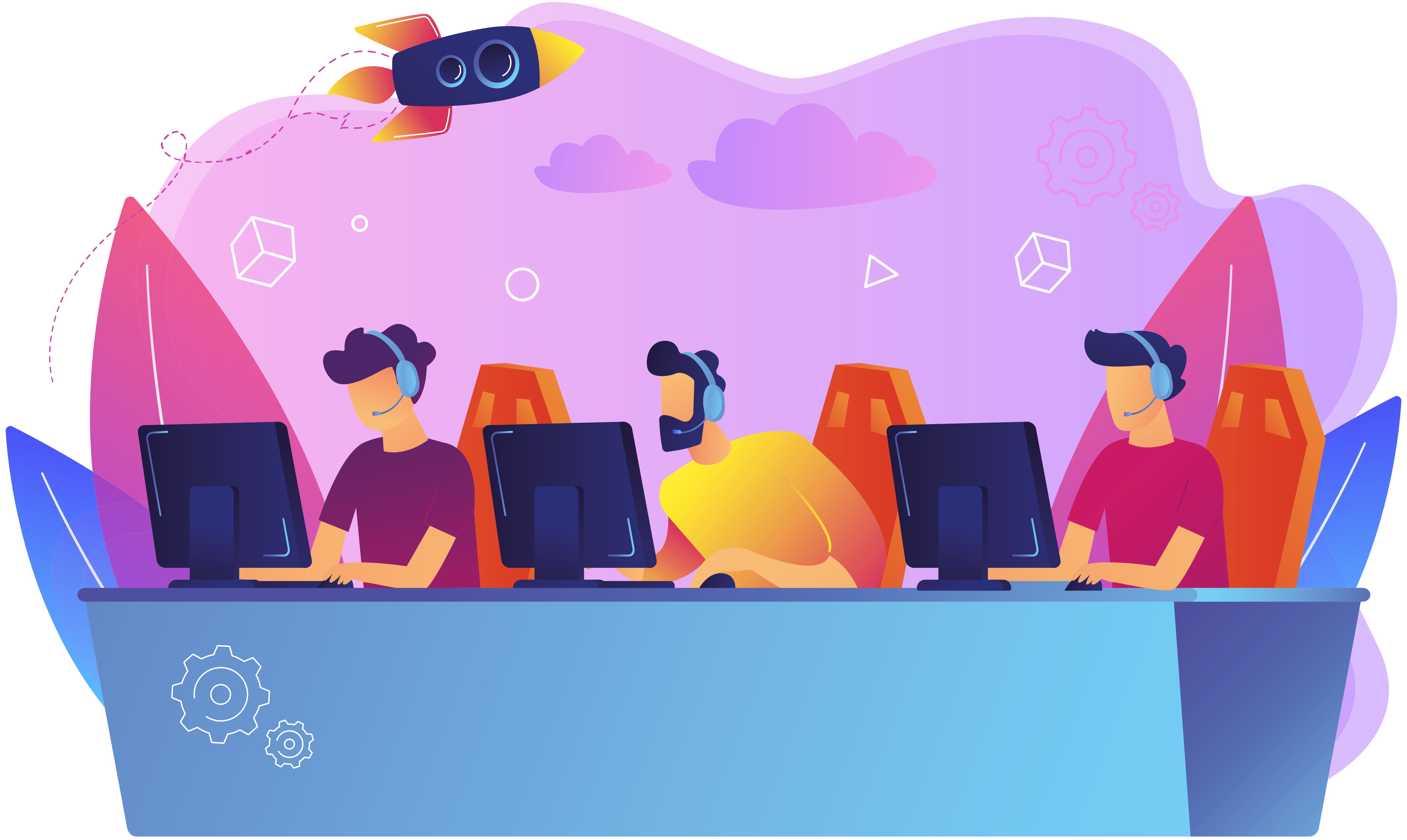
Gaming personas are still largely male-dominated. Only mobile-only gamers – those who don't play on computers, handheld devices or consoles – have a higher ratio of females to males. The other five personas all have a similar ratio of around 60% males, although there is an important difference to note when segmenting by income. Across all six gamer types, males are more likely to fall into the bottom income quartile compared to the top quartile, whereas the reverse is true for female gamers. That is, higher-earning females are more likely to be every type of gamer compared to lower-earning ones.

As you might expect, the more hardcore gamers, such as the cloud gamers and influencers tend to have a higher income. Whereas 21% of casual gamers and 22% of esports fans fall into the top 25% – which is still slightly higher than the global average – this increases to 29% among the gaming influencer.

Regionally, APAC and Latin America tend to dominate across all six gaming personas. The former has the highest proportion of mobile-only gamers, esports fans and influencers, while the latter has the most casual gamers and cloud gamers. Social gamers are as likely to be in one as they are the other.

While APAC is **forecasted** to be the largest digital gaming market in the world, LatAm is one of the fastest growing markets for digital products, particularly video games, with Argentina, Brazil and Mexico leading the race. These three countries **had** about $4 billion of registered income for video games during 2017, which was roughly 20% more than the year before. The whole region is **expected** to have a Compound Annual Growth Rate of 11.4%, leading to a total revenue of $6.3 billion by 2023.

Interestingly, when looking at just our youngest internet users (i.e. 16-24s), North America sees some sharp spikes. Overall, North American consumers are 20% less likely than the global average to be a gaming influencer, but 16-24s in the region are almost 40% more likely to fall into this gaming category. This is mainly due to 16-24s in North America being 1.7x as likely as the average internet user to have purchased a game add-on or DLC, with 29% having done so in the last year.



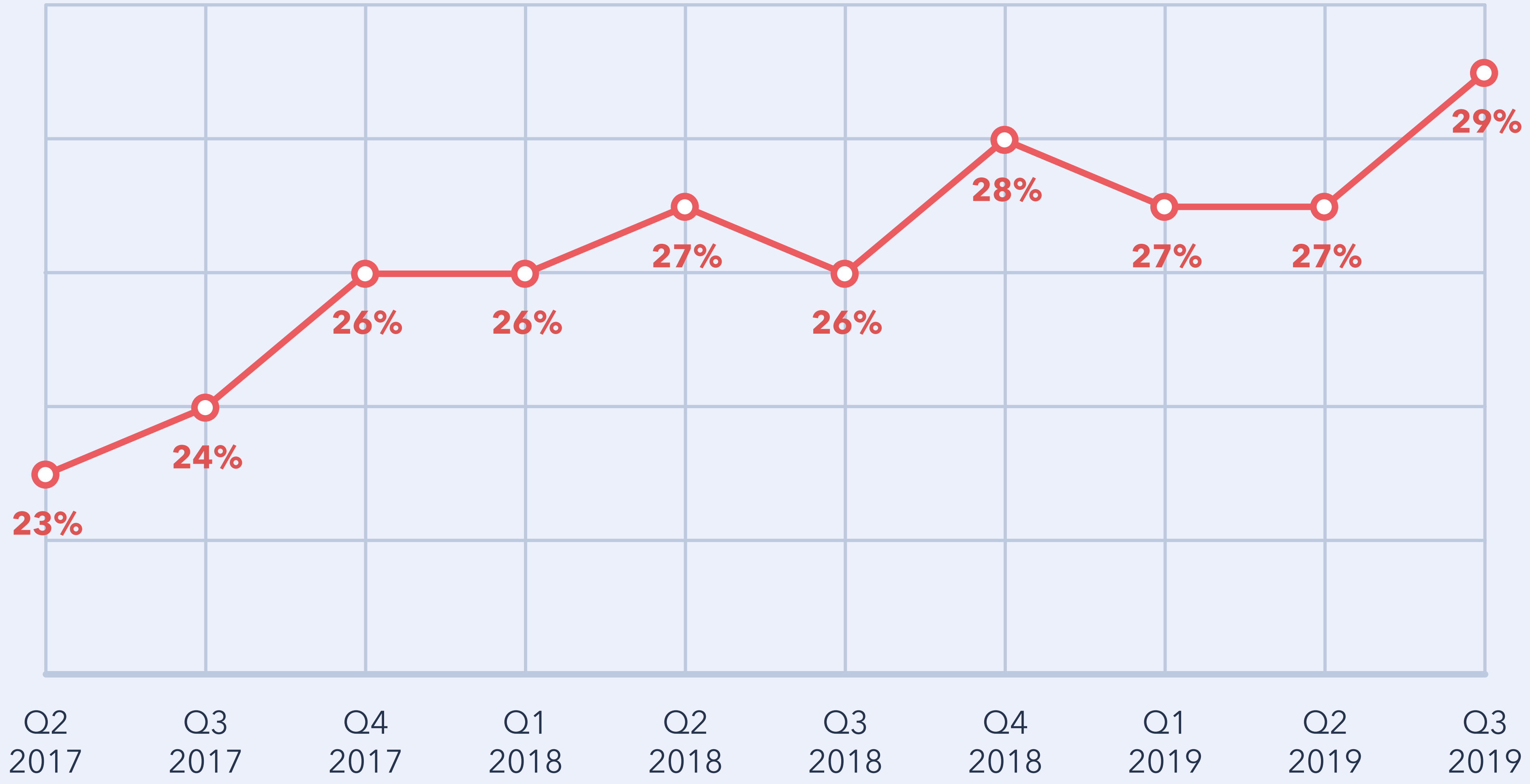
• TREND IN ACTION •

Roblox hits mobile milestone

Question: Which of these devices do you use to play games? (Smartphone)
Source: GlobalWebIndex Q3 2019 **Base:** 972,979 internet users aged 16-64

THE RISE OF HYPER-CASUAL GAMING

% of internet users who are mobile-only gamers
(those who only use a smartphone or tablet to game)



The mobile version of Roblox has **surpassed** $1 billion in gross revenue since it launched for Android and iOS in early 2016, making it the latest title to exceed this substantial milestone. The kid-friendly multiplayer platform game has had 290 million downloads on mobile, with 67% of revenue coming from the U.S., and 9% coming from the UK (the second-highest market). While the Google Play store has been the source of most of the downloads – about 75% of them – Apple devices accounted for ¾ of the revenue.

Gamers around the world

GAMER TYPE BY COUNTRY

% of each gaming persona among internet users in the top three countries

Mobile-only	
Israel	46%
Singapore	44%
Thailand	42%

Socializer	
Philippines	22%
Indonesia	21%
Brazil	18%

Casual gamer	
Colombia	45%
Argentina	45%
Mexico	44%

Cloud gamer	
Brazil	18%
Vietnam	17%
Indonesia	16%

Esporter	
Philippines	35%
Indonesia	35%
Mexico	31%

Influencer	
India	5%
Thailand	5%
Saudi Arabia	4%

Source: GlobalWebIndex Q3 2019
Base: 145,271 internet users aged 16-64

02

Gaming personas

Attitudes & interests

Who are they?

% who say they have an interest in the following

Mobile-only	Casual gamer	Esporter	Socializer	Cloud gamer	Influencer
Music 55%	Music 73%	Music 70%	Music 77%	Music 71%	Technology 70%
Films/cinema 52%	Films/cinema 73%	Films/cinema 70%	Films/cinema 77%	Technology 70%	Food & drink 66%
Food & drink 52%	Technology 68%	Technology 67%	Food & drink 73%	Films/cinema 69%	Music 66%

% who regularly watch the following sports

Mobile-only	Casual gamer	Esporter	Socializer	Cloud gamer	Influencer
Soccer 45%	Soccer 65%	Soccer 70%	Soccer 73%	Soccer 72%	Soccer 74%
Swimming 24%	Basketball 39%	Basketball 44%	Basketball 48%	Basketball 45%	Basketball 48%
Basketball 22%	Swimming 34%	Swimming 38%	Swimming 44%	Cycling 39%	Cycling 46%

Questions: To what extent do you either agree or strongly agree with the statements below? | Which of these things are you interested in? | Which of these sports/sporting activities do you regularly watch on broadcast TV or watch online?
Source: GlobalWebIndex Q3 2019 **Base:** 44,160 total gamers aged 16-64

Who are they?

● Mobile-only ● Casual gamer ● Esporter ● Socializer ● Cloud gamer ● Influencer

Most distinctive attitudinal statements

Mobile-only

IDX 1.08	I just don't understand computers/new technology
IDX 1.07	Technology makes life more complicated
IDX 1.06	I find that I am easily swayed by other people's opinion

Casual gamer

IDX 1.12	I am interested in international events
IDX 1.12	I am constantly connected online
IDX 1.12	I am interested in other cultures and countries

Esporter

IDX 1.25	I would buy a product to be part of the community
IDX 1.24	Having the latest tech products is very important
IDX 1.21	I am a brand conscious person

Socializer

IDX 1.35	I would buy a product to be part of the community
IDX 1.34	Having the latest tech products is very important
IDX 1.31	I am a brand conscious person

Cloud gamer

IDX 1.40	I would buy a product to be part of the community
IDX 1.32	I am much more affluent than the average
IDX 1.32	I regularly try new foods from other countries

Influencer

IDX 1.67	I am comfortable borrowing money
IDX 1.63	I would buy a product to be part of the community
IDX 1.59	I am much more affluent than the average

Most distinctive attitudinal category

Highest index for each persona

1.04	1.43	1.32	1.59	1.57	1.88
Economical	Technophile	Technophile	Cosmopolitan	Cosmopolitan	Cosmopolitan

Most distinctive interest

Highest index for each persona

1.06	1.66	1.55	1.85	1.73	2.69
Beauty/cosmetics	Esports	Adventure/ extreme sports	Entrepreneurship	Adventure/ extreme sports	Vegan food

Most distinctive sport watched

Highest index for each persona

1.06	1.62	1.76	2.34	2.59	5.57
Cricket	Martial arts	Surfing	Squash	Netball	Netball

Note: Indexes are against the average internet user globally **Questions:** To what extent do you either agree or strongly agree with the statements below? | Which of these things are you interested in? | Which of these sports/sporting activities do you regularly watch on broadcast TV or watch online? **Source:** GlobalWebIndex Q3 2019 **Base:** 44,160 total gamers aged 16-64

What stands out?

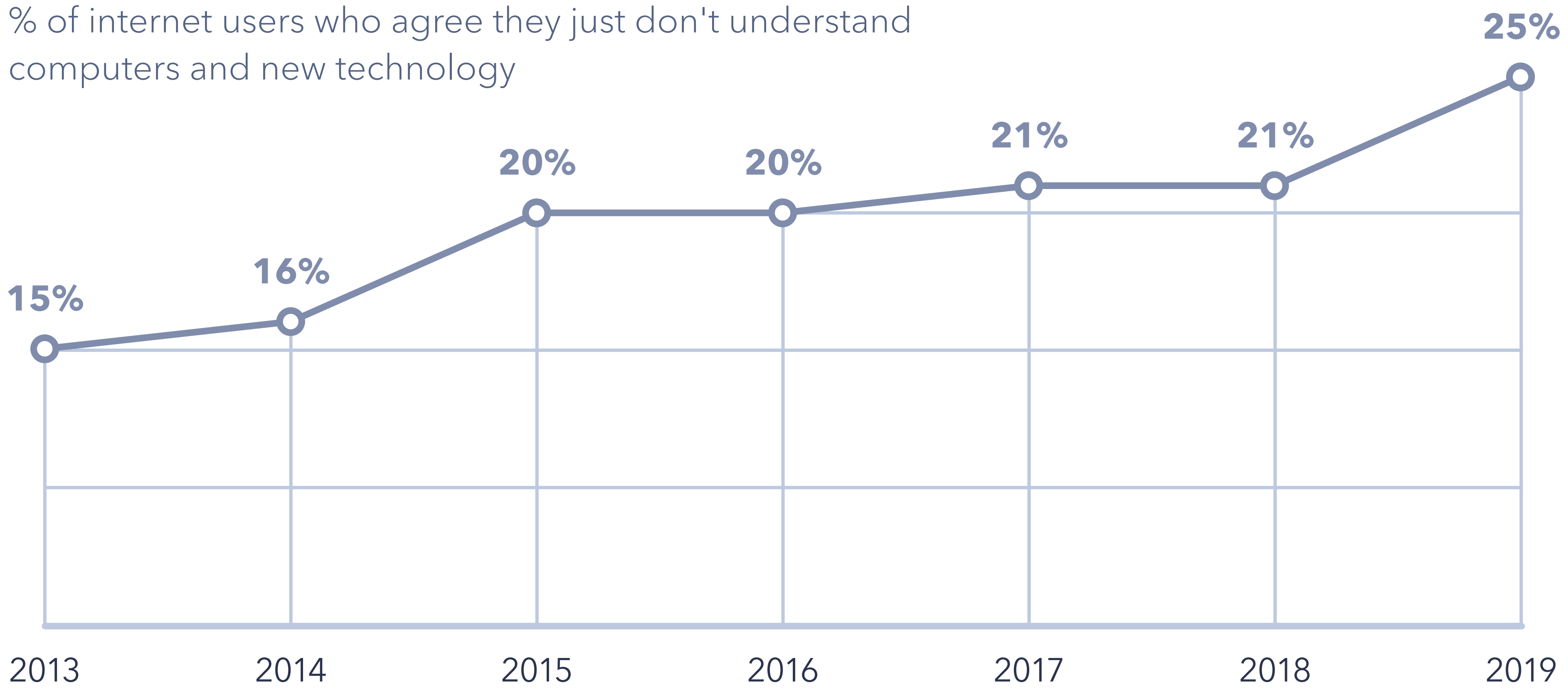
Attitudinally, the more hardcore the gamer, the less likely they are to be categorized as **informed***, and the more likely they are to be **cosmopolitan*** and **aspirational***. Attitudinal statements such as "I regularly try new foods from other countries", "I would like to work and live abroad", "I tend to make decisions based on a "gut" feeling" and "I would buy a service to experience the community around it", all directly increase with the intensity of gaming. It should be noted that mobile-only gamers, despite only representing 29% of all internet users, tend to align with the average internet users' attitudes and preferences, which indicates the ubiquity of mobile gaming globally.

There are some key standouts for the other types of gamers, though. Perhaps surprisingly, influencers are much more likely to agree that they are easily swayed by other people's opinion (Index 1.38), and that they don't understand computers and new technology (Index 1.47). The latter finding may seem incorrect, but we have found consistent tech-induced anxiety among the most tech-savvy audiences – perhaps the more you know, the **less you think you know**. More expected is that social gamers are the least likely to be indifferent to what is "in" and popular right now, and the most likely to look after their image and feel it's important to be respected by their peers.

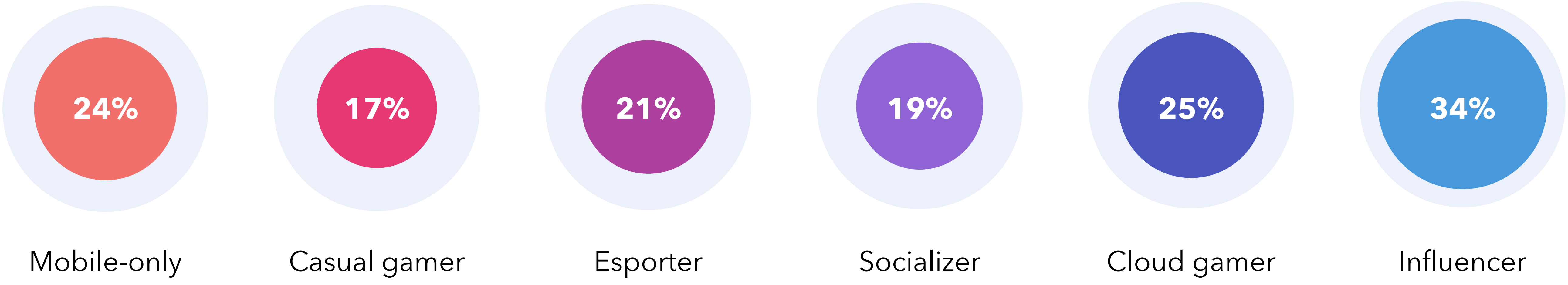
While all gaming personas tend to be most interested in globally-liked topics such as music, technology, film/cinema and food/drink, their most distinctive interests reveal important differences. Esports fans are also science and tech enthusiasts, particularly computers/coding and gadgets. Social gamers are the gaming persona most likely to over-index across most of the 52 interests we currently survey, but business-related interests, such as entrepreneurship, business and investments, along with food-related interests such as health foods/drinks, cooking and eating out, form the basis of this gamer type's stand-out passions.

TECH ANGST OVER TIME

% of internet users who agree they just don't understand computers and new technology



% of each gaming persona who agree they just don't understand computers and new technology



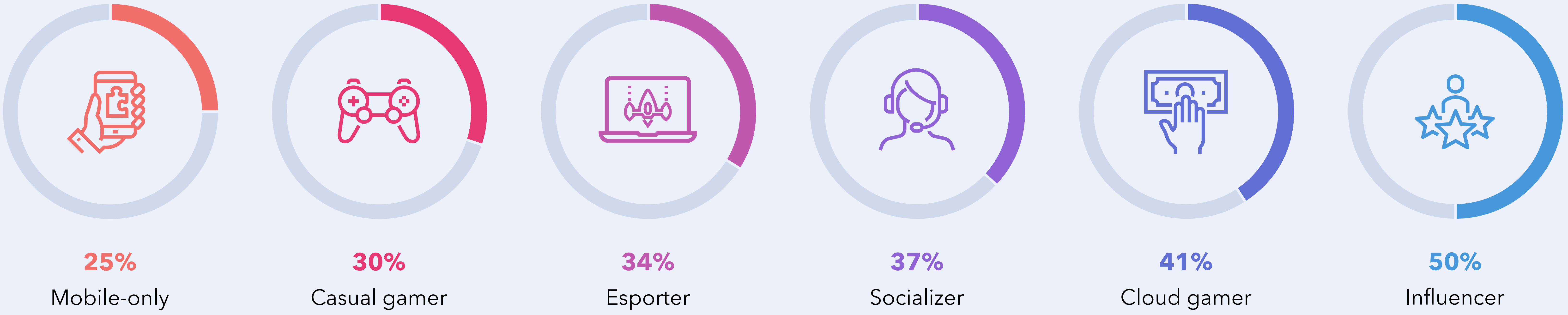
*Click **here** for more information on our attitudinal segmentations

Question: To what extent do you either agree or strongly agree with the statements below?
Source: GlobalWebIndex Q3 2019 **Base:** 44,160 total gamers aged 16-64

• TREND IN ACTION •

The future of music

A LOVE OF LIVE MUSIC | % of each gaming persona who agree that they regularly attend live music concerts/events



Dance music culture has invaded gaming, blurring the line between the real and virtual world. Big gaming companies are recruiting dance and electronic music DJs for more than their music. They are co-opting their image, brand and personality, ultimately weaving their digital avatars into a video game storyline. Marshmello **played** two DJ sets for over 10 million viewers in Fortnite, Minecraft staged not one but two electronic music festivals inside its game engine, and Lindsey Stirling **donned** a motion-capture suit and performed as an avatar inside an interactive, virtual concert for over 400,000 attendees.

Question: We'd like to ask you about how you engage with music. For each of these sets of statements, please select the point on the scale that best describes you - are you at one end of the scale or somewhere in the middle? (Attend live music concerts/events) **Source:** GlobalWebIndex Q3 2019 **Base:** 44,160 total gamers aged 16-64

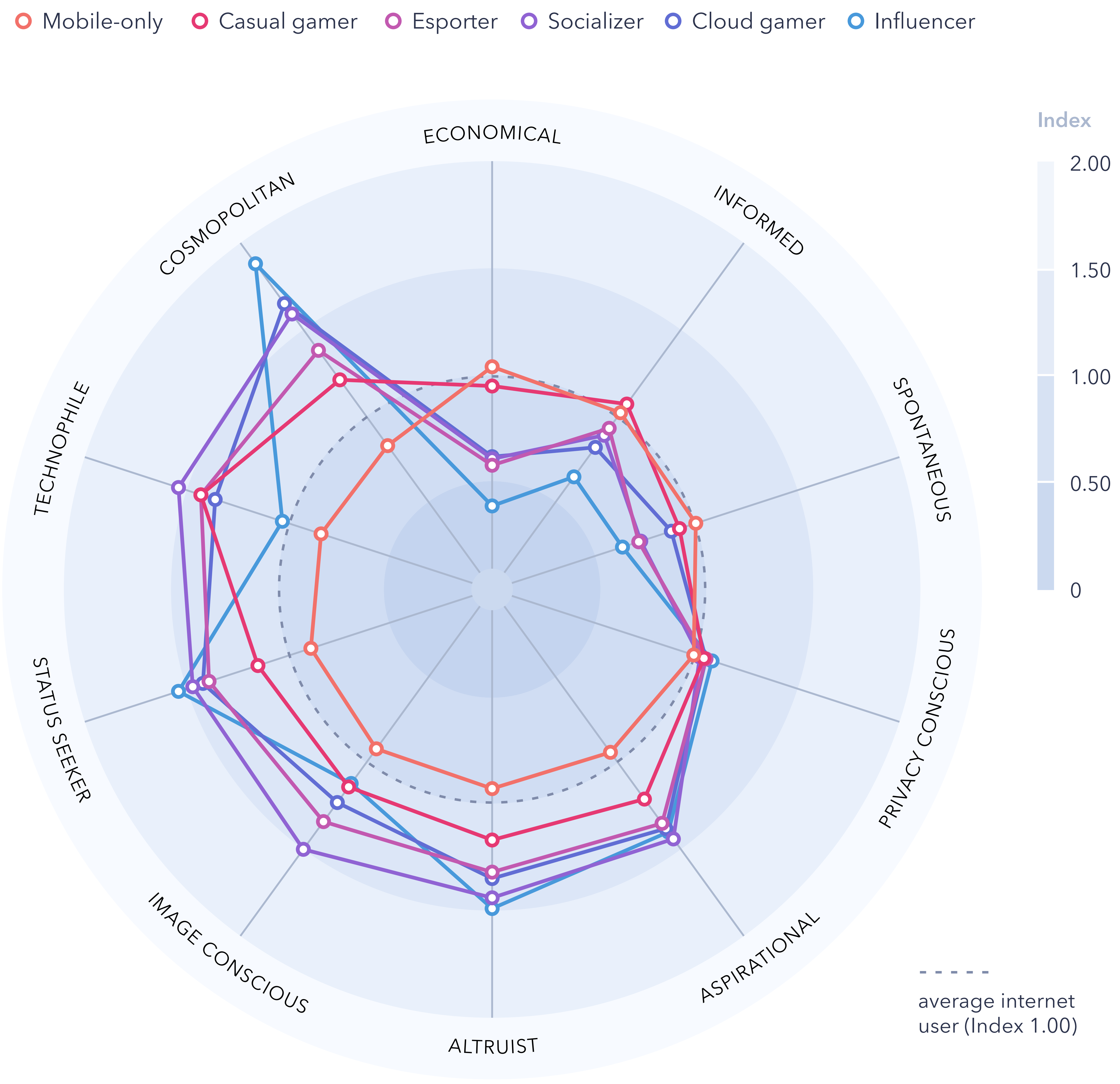
Attitudinal segmentation

ATTITUDINAL PROFILE

Indexes of where each gaming type falls in each attitudinal segment, against the average internet user globally

	Mobile-Only	Casual Gamer	Esporter	Socializer	Cloud gamer	Influencer
Economical	1.04	0.95	0.58	0.61	0.62	0.39
Informed	1.02	1.07	0.93	0.89	0.82	0.65
Spontaneous	1.00	0.92	0.72	0.73	0.88	0.64
Privacy Conscious	0.99	1.04	1.05	1.02	1.05	1.08
Aspirational	0.94	1.21	1.35	1.44	1.38	1.40
Altruist	0.93	1.17	1.32	1.44	1.35	1.49
Image Conscious	0.92	1.14	1.34	1.50	1.23	1.12
Status Seeker	0.89	1.15	1.39	1.47	1.42	1.54
Technophile	0.84	1.43	1.43	1.54	1.36	1.03
Cosmopolitan	0.83	1.21	1.38	1.59	1.65	1.88

Click **here** for more information on our attitudinal segmentations



Question: To what extent do you either agree or strongly agree with the statements below?
Source: GlobalWebIndex Q3 2019 **Base:** 44,160 total gamers aged 16-64

03

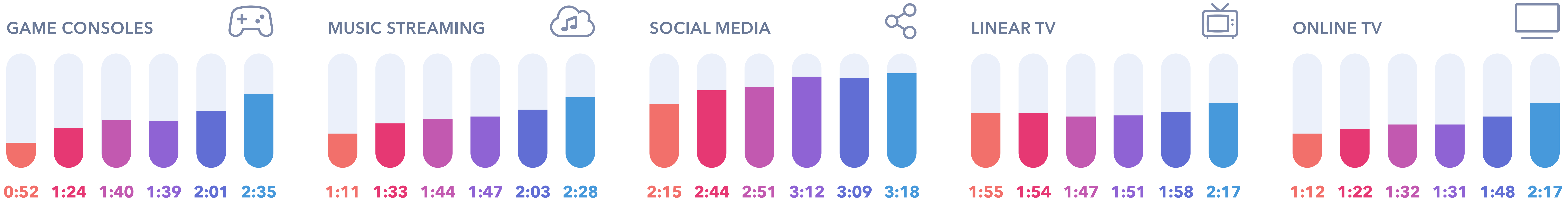
Gaming personas

The online persona

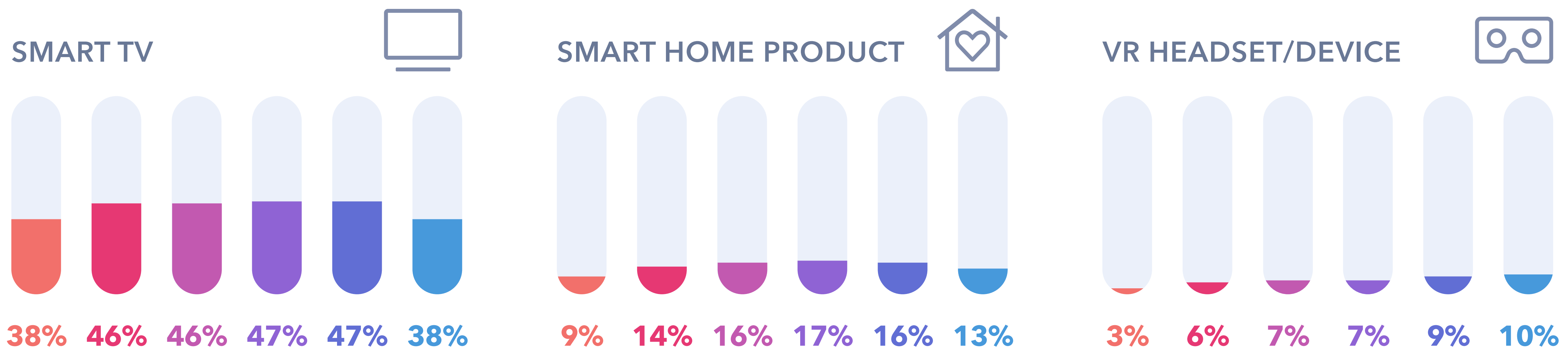
Online behaviors

Avg time spent daily (h:mm) on...

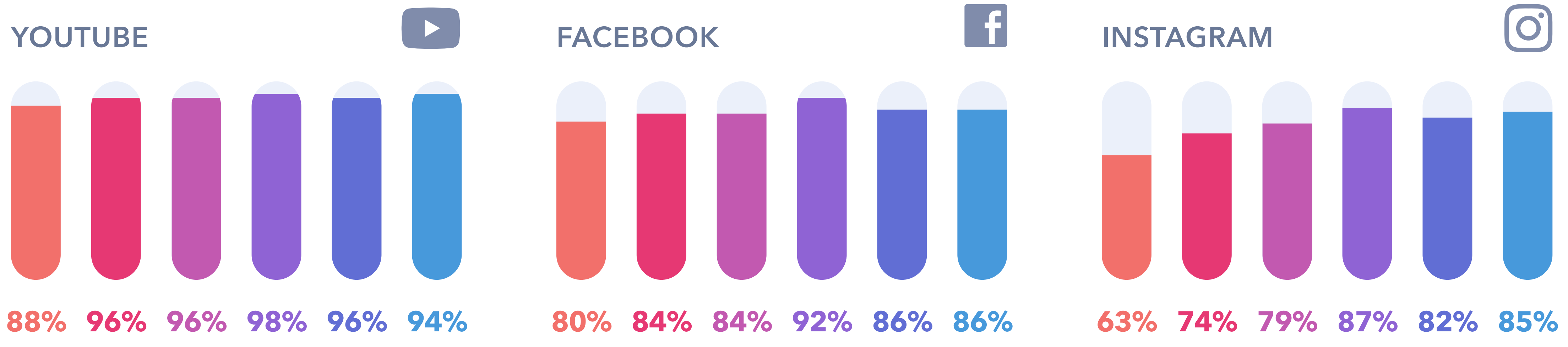
- ● Mobile-only
- ● Casual gamer
- ● Esporter
- ● Socializer
- ● Cloud gamer
- ● Influencer



% who own the following devices

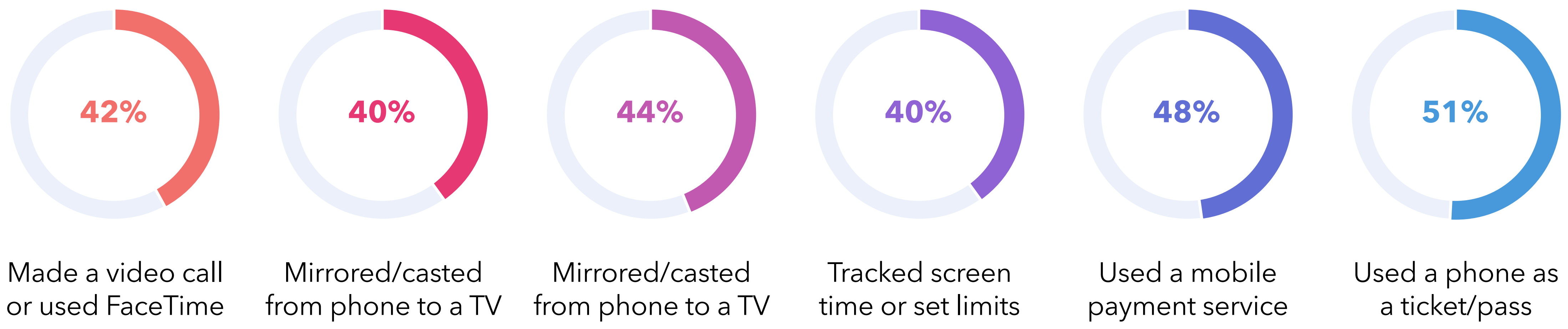


% who have visited these platforms in the last month



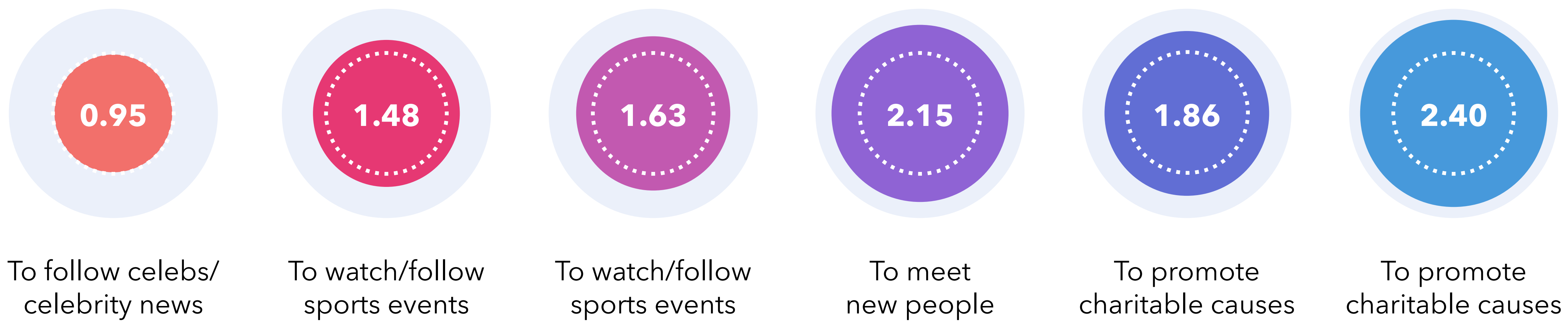
% who have done the following mobile actions in the last month

Top action for each persona



Most distinctive reason for using social media

Highest index for each persona



Questions: On an average day, how long do you spend on games consoles? | Which of the following sites/applications have you visited or used in the past month via your PC/Laptop, Mobile or Tablet? | Which of the following devices do you own? | Which of these have you done on your mobile in the last month? | What are your main reasons for using social media? **Source:** GlobalWebIndex Q3 2019 **Base:** 44,160 total gamers aged 16-64

What marketers need to know

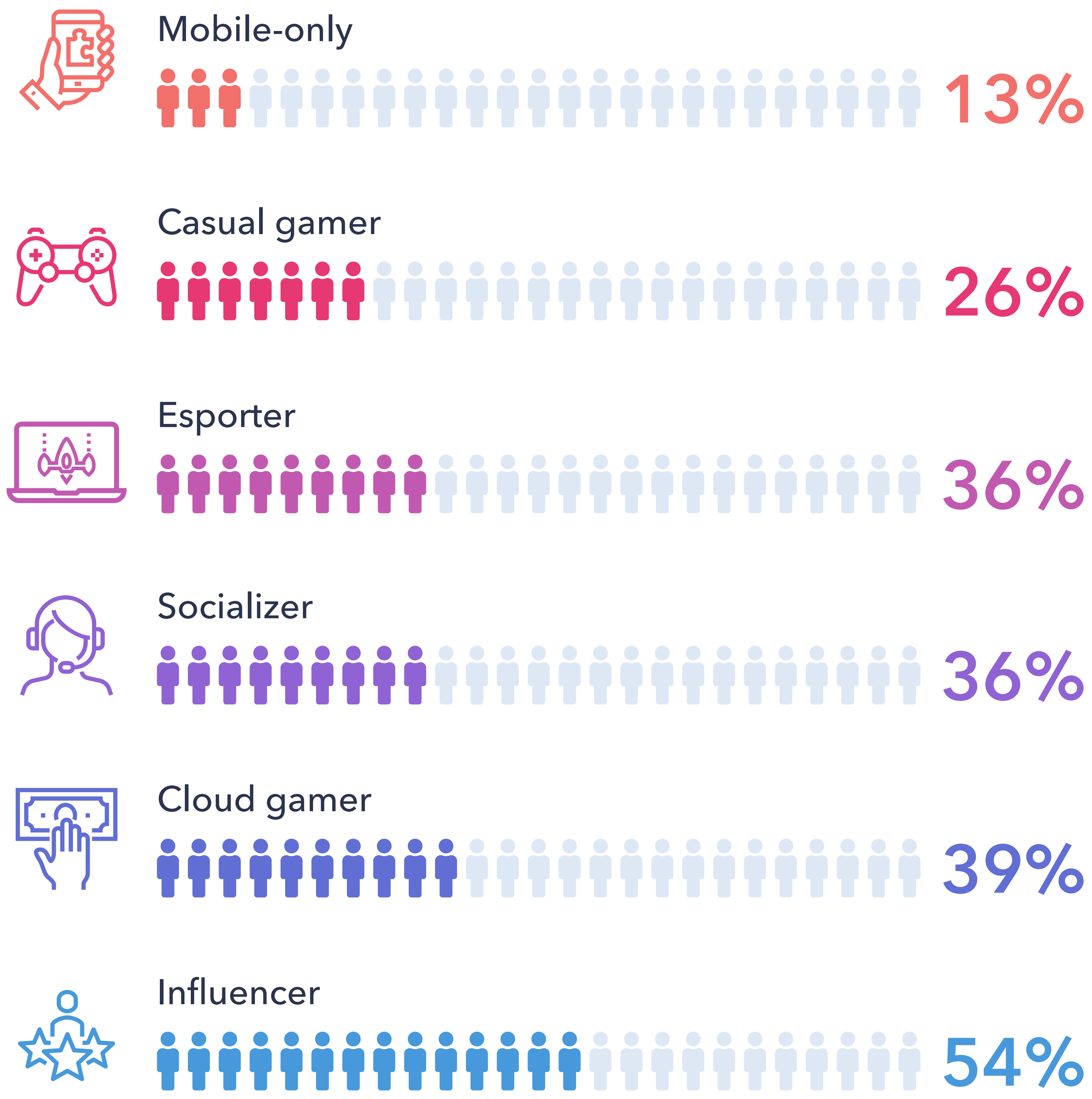
MEDIA CONSUMPTION

The more hardcore the gamer, the more likely they are to be heavy consumers of other types of media as well. Time spent per day on music streaming services, for example, increases from 1.5 hours for casual gamers, to 2 hours for cloud gamers, to 2.5 hours for influencers. Indeed, influencers consume a lot of media per day in total, since engaging with online content makes up a large part of their interests and lifestyle. This group watch the most linear TV and online TV (4 hours 34 minutes in total), and are the only group where online TV consumption matches or exceeds broadcast TV. Compare this with mobile-only or casual gamers, who typically spend 30-40 minutes longer per day on traditional broadcast TV.

All gamers are heavy social media users, and there are minimal differences in visiting rates of the three top platforms YouTube, Facebook and Instagram. There are much more prominent differences for Twitch engagement. Engagement figures double going from mobile-only gamers to casual gamers (13% to 26%), which increases again going from casual gamer to esports fans/ social gamer (26% to 36%). As you'd expect, gaming influencers love Twitch, with 54% visiting the streaming service each month. Additionally, there are key disparities in why different personas use social media. The more relaxed gamer types, like casual gamers and esports fans, use social media most distinctively to find sports content, social gamers want to meet new people on social media, and more hardcore gaming personas are approximately twice as likely as the global average to use social media to promote and support charitable causes.

TWITCH ENGAGEMENT

% who have visited/used Twitch in the last month



GAMING BEHAVIOR

Although the use of games consoles and PCs/laptops form a core component of all our personas' definitions (apart from mobile-only), we can still analyze different rates of usage across devices. While PCs/laptops are used consistently across all five types of gamers (ranging from 85-90%), games console and handheld device usage spikes dramatically for the hardcore gamers. Two-thirds of cloud gamers use a console to game, which jumps up again to 81% among our influencers.

For gaming activities, there are remarkable similarities between males and females in each gaming persona type. Some of the only differences between the two genders are seen in the purchasing activities of social gamers, such as purchasing a game add-on or DLC (34% of males have done so in the last year compared to 28% of females) or using a subscription service like XBOX LIVE or PlayStation Plus (34% of male social gamers vs 29% of females). Female social gamers, on the other hand, are more likely to have shared an image/video of their gameplay online (57% of females vs 51% of males).

For all our purchasing or subscription-related activities, casual gamers are much more likely to have done them recently compared to hyper-casual mobile-only gamers. Whereas 8% of mobile-only gamers have purchased a video game from an online store/digital platform, this rises to 35% for casual gamers. This demonstrates the marketing potential of this group – one might think that free-to-play gamers might avoid gaming activities that involve payments. But this is not the case, compared to freeloaders (those who have played a free-to-play game and haven't done any purchase-related gaming activity), casual gamers are more likely to have paid for both an in-app purchase (Index 1.59) and a mobile game (Index 1.58) in the last month.

Question: Which of the following sites/applications have you visited or used in the past month via your PC/Laptop, Mobile or Tablet?
Source: GlobalWebIndex Q3 2019 **Base:** 44,160 total gamers aged 16-64

Gaming preferences

% who have used the following devices to play games

	Mobile-only	Casual gamer	Esporter	Socializer	Cloud gamer	Influencer
Smartphone	95%	86%	87%	90%	86%	90%
Personal PC/Laptop	–	86%	87%	89%	84%	85%
Handheld device	–	24%	29%	30%	38%	59%
Games console	–	52%	55%	56%	65%	81%

The most played gaming franchise in the last year

	Mobile-only	Casual gamer	Esporter	Socializer	Cloud gamer	Influencer
	14% Plants vs. Zombies	31% FIFA	36% LoL	38% LoL	41% FIFA	52% CoD

The most distinctive gaming franchise played in the last year

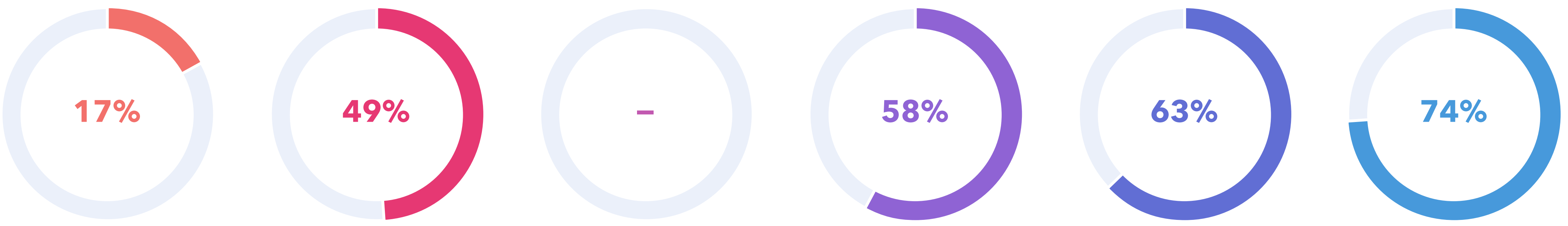
	Mobile-only	Casual gamer	Esporter	Socializer	Cloud gamer	Influencer
	IDX 0.91 Bubble Witch	IDX 2.06 Apex Legends	IDX 2.50 Overwatch	IDX 2.72 DotA	IDX 3.58 DotA	IDX 6.87 The Division

Note: Blank data caused by datapoint already being in the audience definition **Questions:** Which of these devices do you use to play games? | Which of these games/gaming franchises have you played in the last 12 months? | Thinking about gaming, which of these things have you done? **Source:** GlobalWebIndex Q3 2019 **Base:** 44,160 total gamers aged 16-64

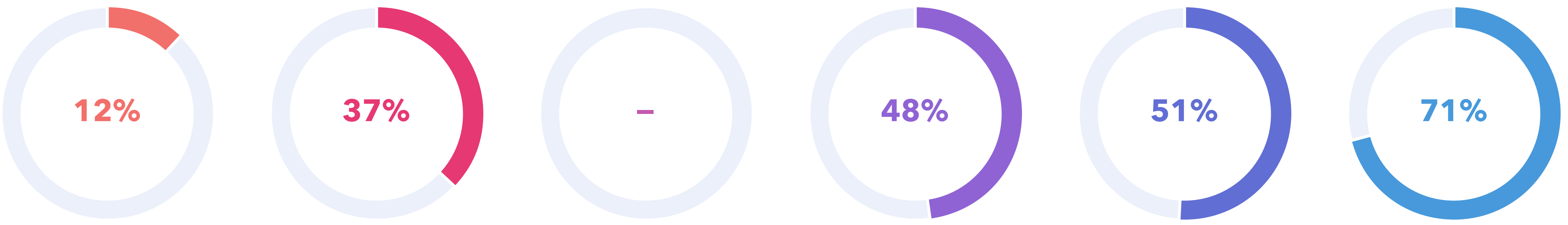
Gaming preferences

● Mobile-only ● Casual gamer ● Esporter ● Socializer ● Cloud gamer ● Influencer

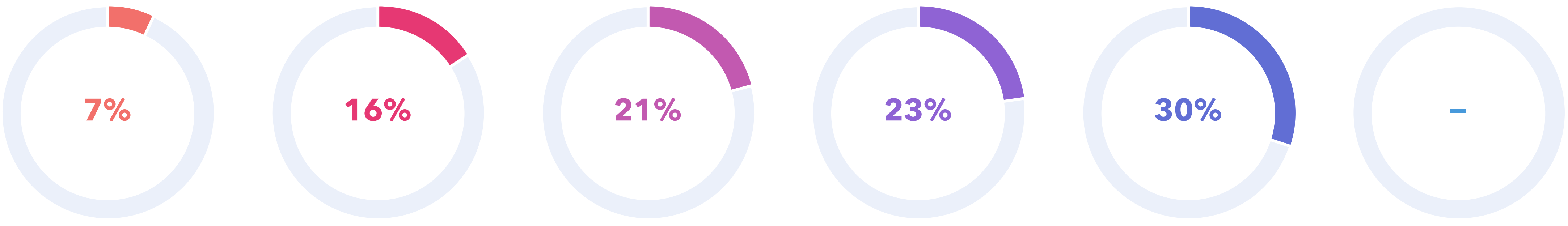
% who have done the following mobile actions in the last month



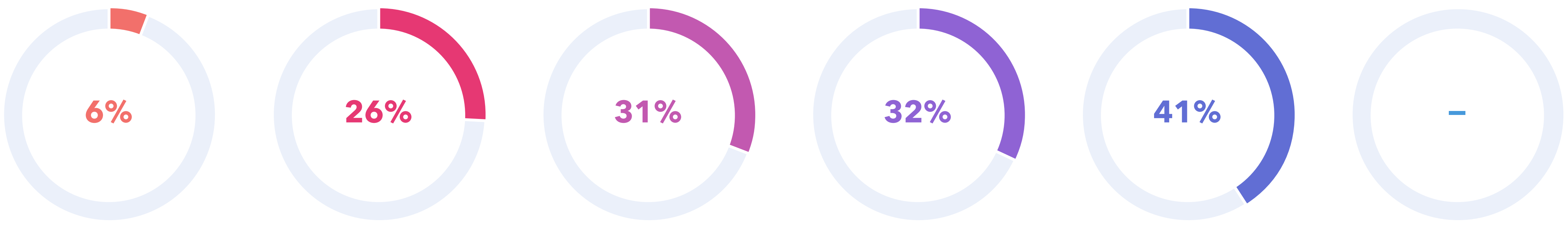
Watched a live gaming stream (e.g. on Twitch, PandaTV etc)



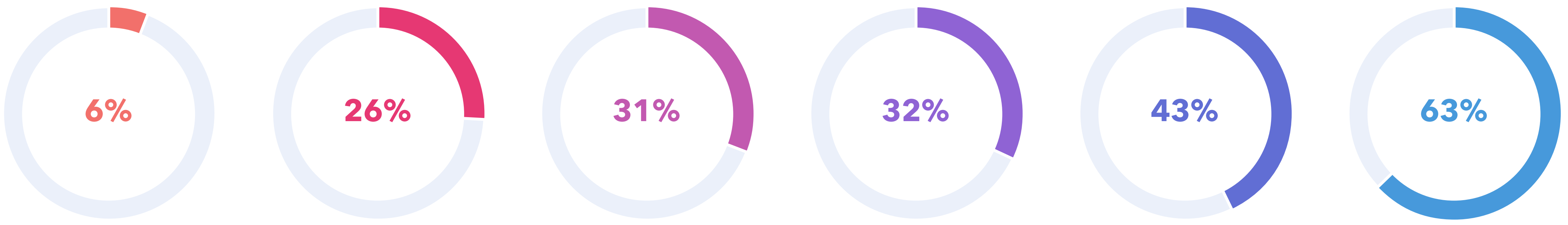
Watched an esports tournament (multiplayer game competitions)



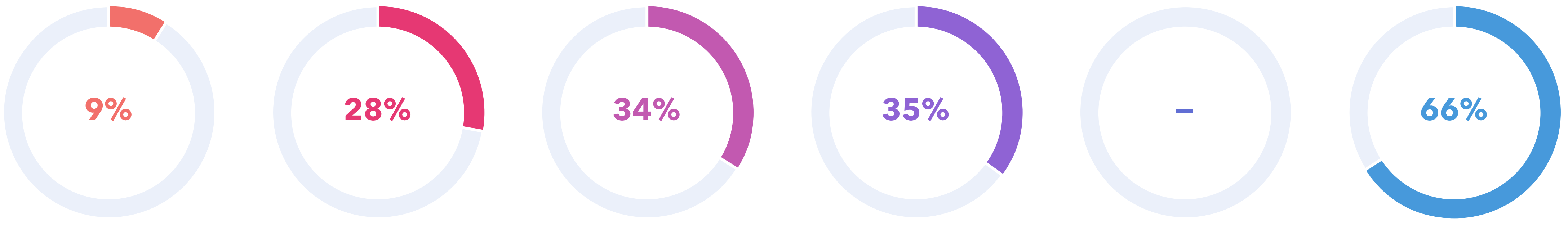
Broadcast a live gameplay stream



Purchased a game add-on or DLC



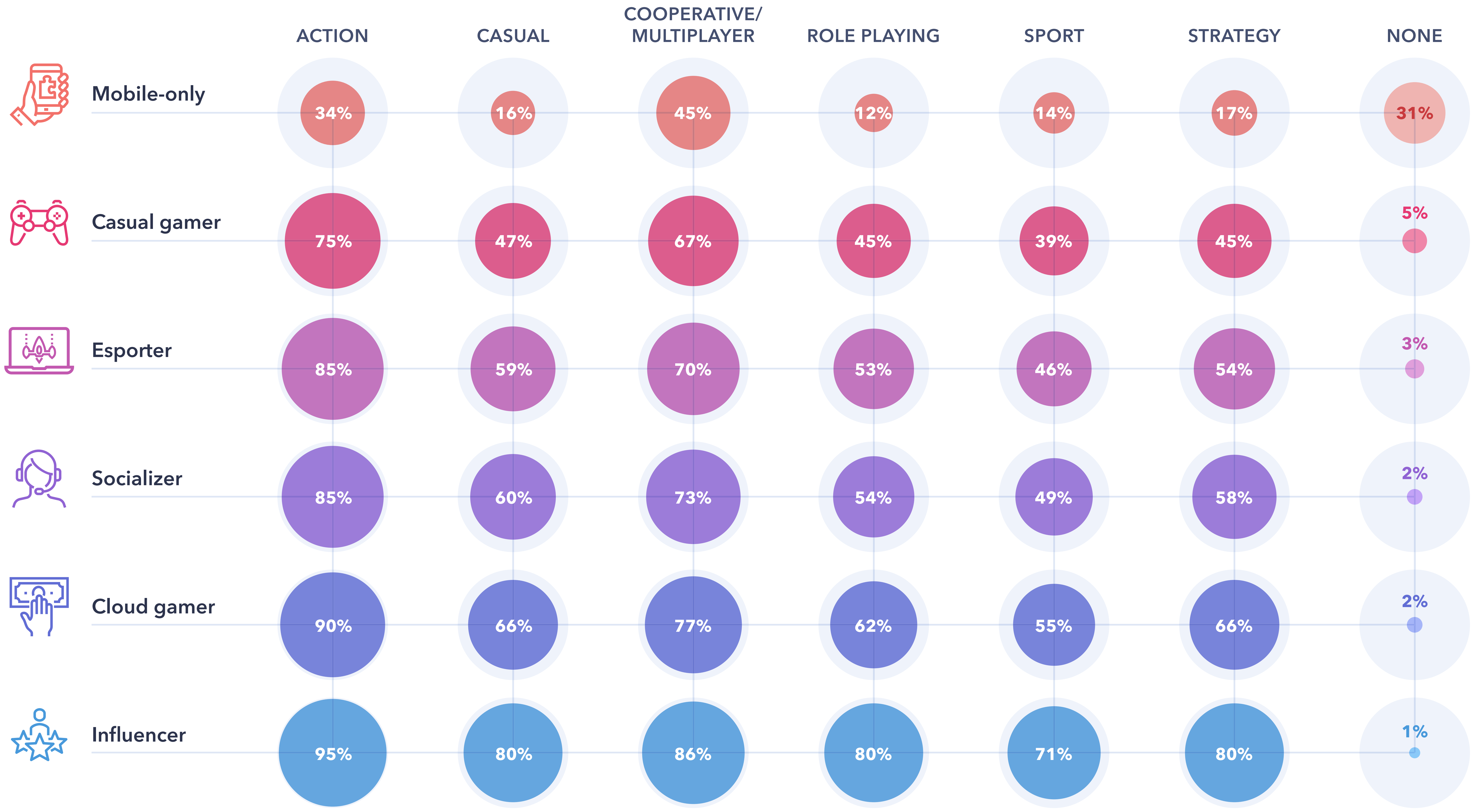
Used a subscription service such as Xbox Live, PS Plus or Steam



Played a game using cloud gaming platform/streaming service

Questions: Which of these devices do you use to play games? | Which of these games/gaming franchises have you played in the last 12 months? | Thinking about gaming, which of these things have you done?
Note: Blank data caused by datapoint already being in the audience definition **Source:** GlobalWebIndex Q3 2019 **Base:** 44,160 total gamers aged 16-64

Gaming genres



	ACTION	CASUAL	COOPERATIVE/ MULTIPLAYER	ROLE PLAYING	SPORT	STRATEGY	NONE
Mobile-only	34%	16%	45%	12%	14%	17%	31%
Casual gamer	75%	47%	67%	45%	39%	45%	5%
Esporter	85%	59%	70%	53%	46%	54%	3%
Socializer	85%	60%	73%	54%	49%	58%	2%
Cloud gamer	90%	66%	77%	62%	55%	66%	2%
Influencer	95%	80%	86%	80%	71%	80%	1%

DEFINITIONS

ACTION:
Action Adventure/Open World
Beat'em Up
Fighting
Shooter
Action/Platform

CASUAL:
Party Games
Puzzle/Platform
Rhythm/Music

COOPERATIVE/MULTIPLAYER:
Battle Royale
MOBA - Multiplayer Online Battle Arena
MMO - Massively Multiplayer Online

ROLE PLAYING:
Role Playing
Action RPG
Survival/Horror

SPORT:
Racing
Sports

STRATEGY:
Online Board/Card games
Strategy/Real-Time Strategy
Simulation

Question: Which of these gaming genres have you played in the last 12 months?
Source: GlobalWebIndex Q3 2019 **Base:** 44,160 total gamers aged 16-64

04

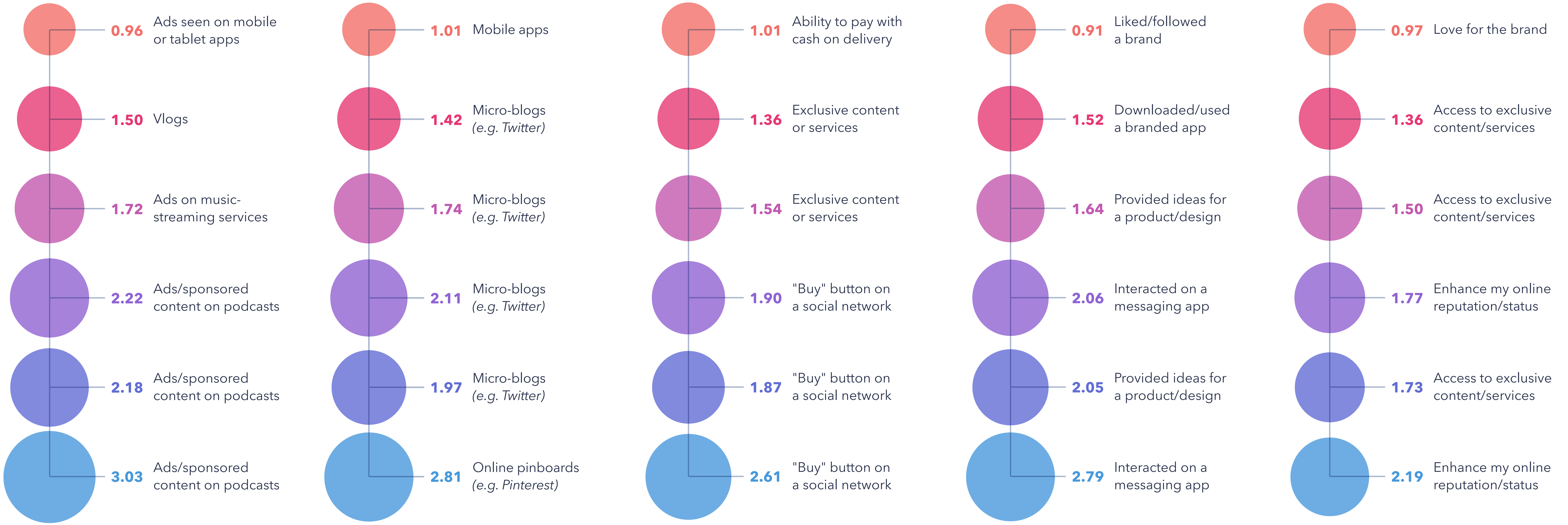
Gaming personas

The purchase journey

Purchasing preferences

● Mobile-only ● Casual gamer ● Esporter ● Socializer ● Cloud gamer ● Influencer

MOST DISTINCTIVE...



...source of brand discovery

Highest index for each persona

0.96	Ads seen on mobile or tablet apps
1.50	Vlogs
1.72	Ads on music-streaming services
2.22	Ads/sponsored content on podcasts
2.18	Ads/sponsored content on podcasts
3.03	Ads/sponsored content on podcasts

...online source of product research

Highest index for each persona

1.01	Mobile apps
1.42	Micro-blogs *(e.g. Twitter)*
1.74	Micro-blogs *(e.g. Twitter)*
2.11	Micro-blogs *(e.g. Twitter)*
1.97	Micro-blogs *(e.g. Twitter)*
2.81	Online pinboards *(e.g. Pinterest)*

...online purchase driver

Highest index for each persona

1.01	Ability to pay with cash on delivery
1.36	Exclusive content or services
1.54	Exclusive content or services
1.90	"Buy" button on a social network
1.87	"Buy" button on a social network
2.61	"Buy" button on a social network

...brand interaction

Highest index for each persona

0.91	Liked/followed a brand
1.52	Downloaded/used a branded app
1.64	Provided ideas for a product/design
2.06	Interacted on a messaging app
2.05	Provided ideas for a product/design
2.79	Interacted on a messaging app

...brand advocacy motivation

Highest index for each persona

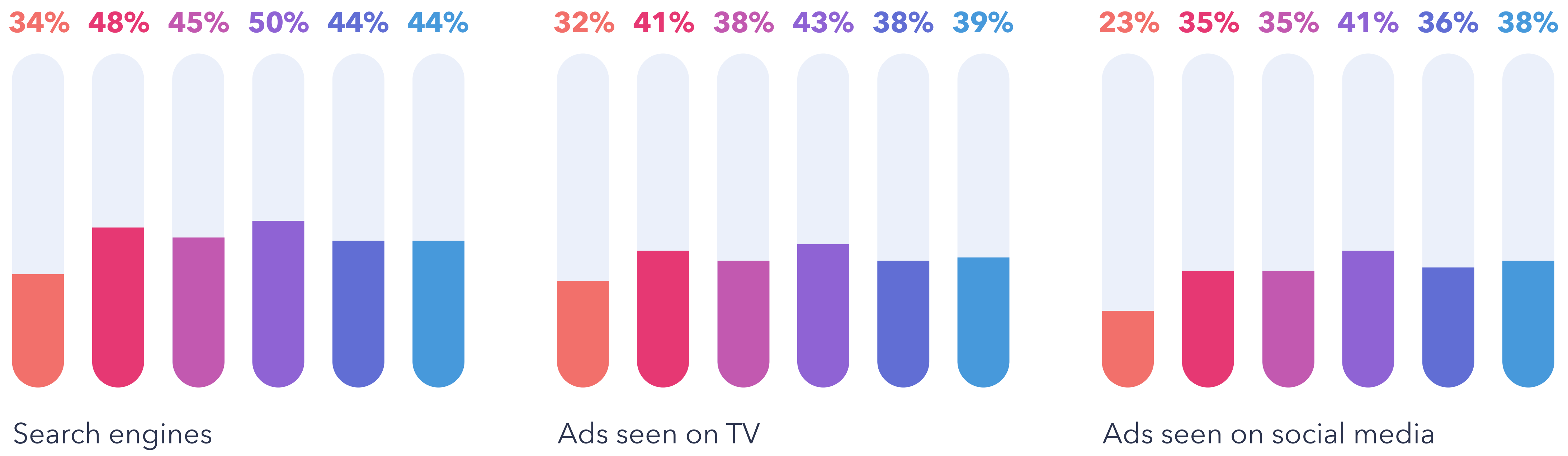
0.97	Love for the brand
1.36	Access to exclusive content/services
1.50	Access to exclusive content/services
1.77	Enhance my online reputation/status
1.73	Access to exclusive content/services
2.19	Enhance my online reputation/status

Questions: How do you typically find out about new brands and products? | Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services? | When shopping online, which of these features would most increase your likelihood of buying a product? | Which of these things do you want brands to do? **Source:** GlobalWebIndex Q3 2019 **Base:** 44,160 total gamers aged 16-64

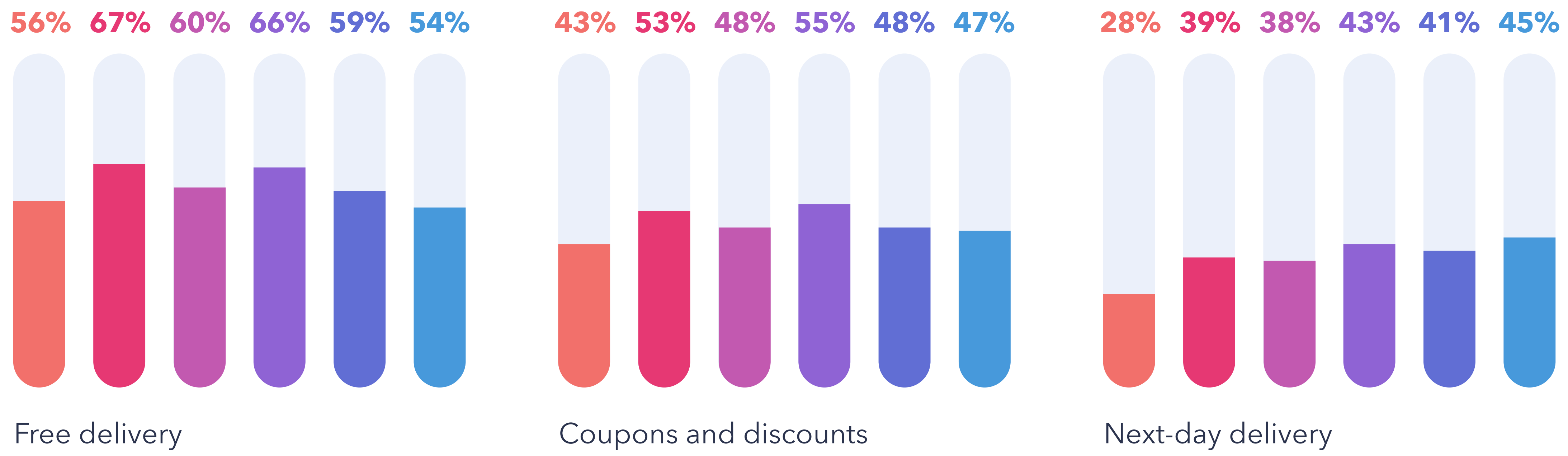
Purchasing preferences

● Mobile-only ● Casual gamer ● Esporter ● Socializer ● Cloud gamer ● Influencer

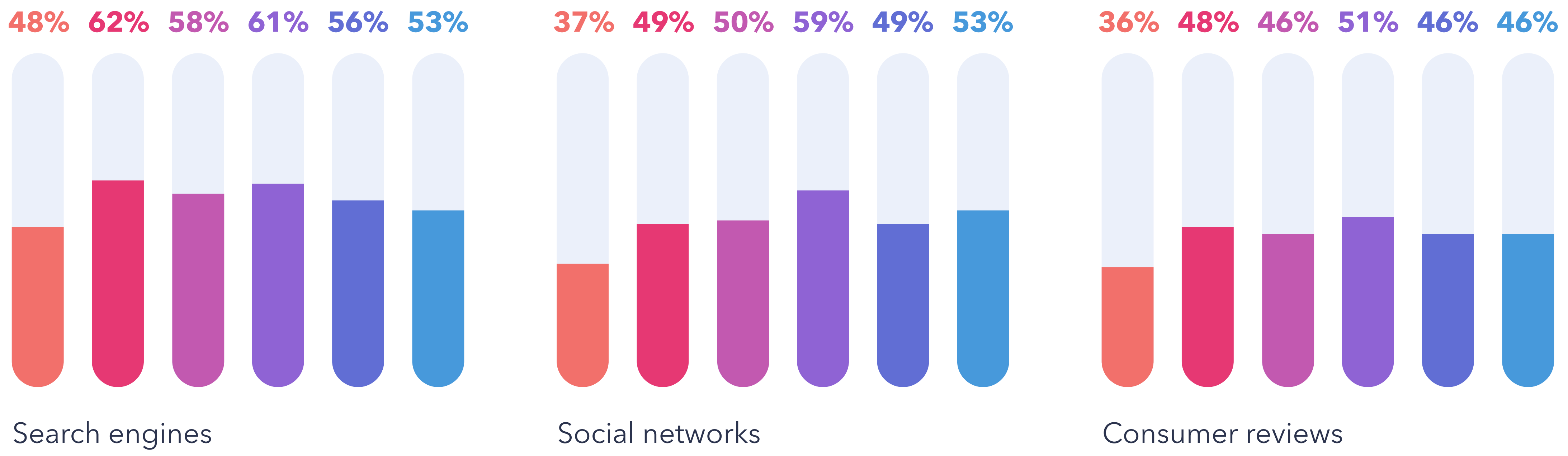
% who use the following to discover brands



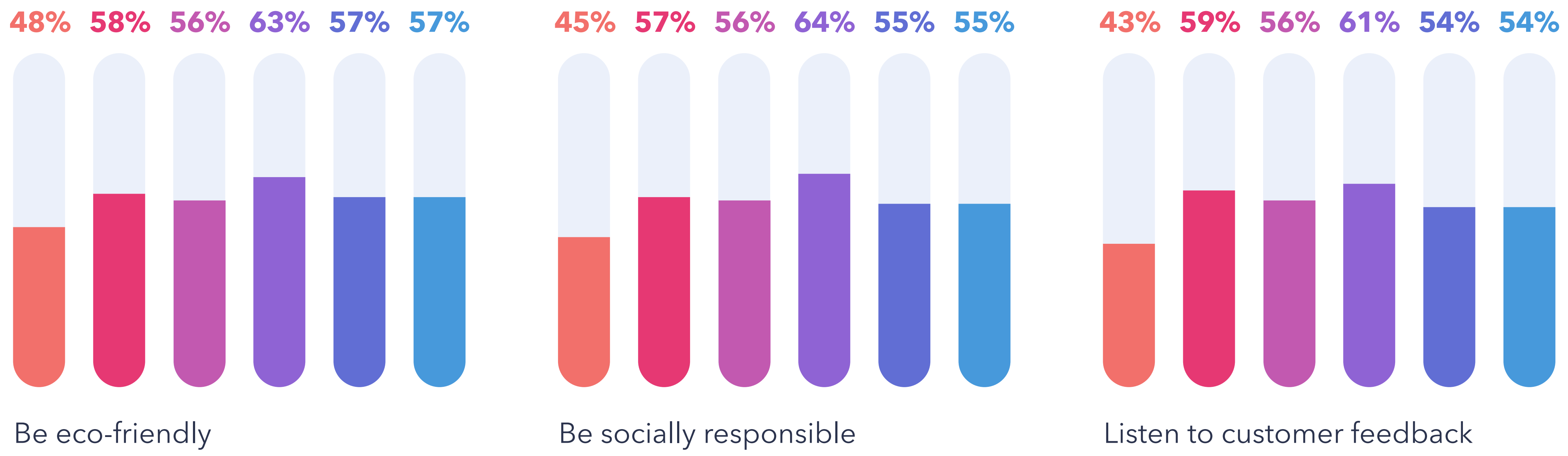
% who say the following would motivate them to purchase a product online



% who use the following online sources for product research



% who say their favorite brands should do the following things



Questions: How do you typically find out about new brands and products? | Which of the following online sources do you mainly use when you are actively looking for more information about brands, products, or services? | When shopping online, which of these features would most increase your likelihood of buying a product? | Which of these things do you want brands to do? **Source:** GlobalWebIndex Q3 2019 **Base:** 44,160 total gamers aged 16-64

Aim... fire: targeted marketing

Across the purchase journey, the most cited sources for brand discovery, online product research and purchase drivers remain fairly consistent across persona types. There are slight differences to note, though. For example, free delivery is a more important purchase driver for casual (67%) and social gamers (66%) compared to influencers (54%) and mobile-only gamers (56%).

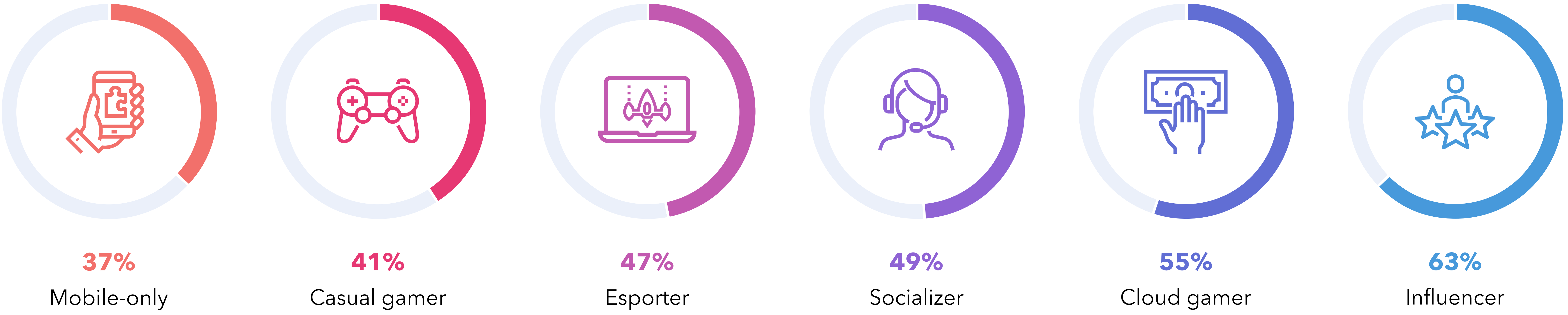
Things become more interesting when looking at the most distinctive source or driver for each gamer type. At the earliest stage of the purchase journey – brand discovery – it's the freshest, most agile types of media where ads work best. Casual gamers over-index the most for discovering products/brands though blogs, esports fans over-index for ads on music-streaming services, and our three most hardcore gamers over-index for sponsored content on podcasts. The ads on these media formats perhaps do better than more traditional routes because of the higher engagement these gamers have while watching a vlog or listening to a podcast.

For product research, micro-blogs stand out for all gamer types apart from mobile-only gamers. Micro-blogs, like Twitter, do well to combine the word-of-mouth branding that resonates well for gamers generally, with the transient, easily-digestible nature of Tweets and short-form blog posts. While gaming influencers are 2.5x the global average to use micro-blogs for online product research, their most distinctive source is online pinboards such as Pinterest (Index 2.81). This makes sense, given that these types of gamers are on the lookout for inspiration from other content creators which will shape the broadcasts that they put out themselves.

Finally, there is a great demand for brands to be eco-friendly and socially responsible, across all six gamer types. The more hardcore the gamer, the more likely they are to donate to charity every month, to want brands to support local suppliers, and to say that knowing a product/company was environmentally friendly would increase the likelihood of them buying a product. Aside from mobile-only gamers, the other gamer types are anywhere between 20-50% more likely than the global average to cite an interest in environmental issues, showcasing that eco-consciousness is no longer a nice-to-have in gaming but a necessity.

CHARITY-GIVING

% who donate to charity at least monthly



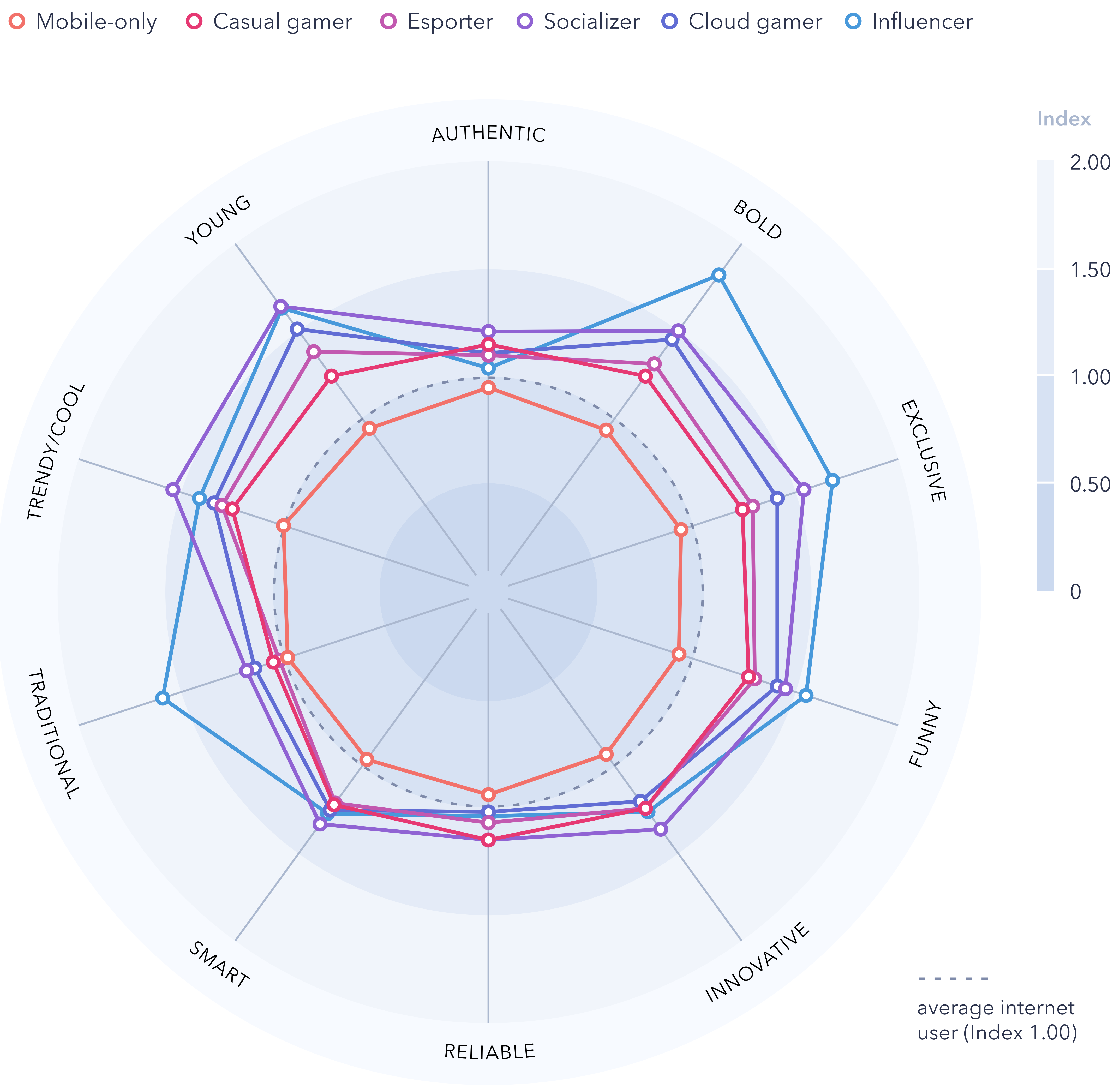
Question: On average, how often would you say you do the following things? (Donate to charity at least monthly)
Source: GlobalWebIndex Q3 2019 **Base:** 44,160 total gamers aged 16-64

The brand role

BRANDS SHOULD BE...

Indexes of what qualities these gaming personas want from brands, against the average internet user globally

	Mobile-Only	Casual Gamer	Esporter	Socializer	Cloud gamer	Influencer
Authentic	0.95	1.15	1.10	1.21	1.11	1.04
Bold	0.93	1.24	1.31	1.50	1.45	1.82
Exclusive	0.94	1.24	1.29	1.54	1.41	1.68
Funny	0.93	1.27	1.30	1.45	1.41	1.55
Innovative	0.93	1.24	1.24	1.36	1.20	1.26
Reliable	0.94	1.15	1.07	1.15	1.02	1.04
Smart	0.96	1.22	1.21	1.33	1.25	1.27
Traditional	0.98	1.05	1.02	1.18	1.14	1.59
Trendy/cool	1.00	1.25	1.30	1.54	1.34	1.41
Young	0.94	1.24	1.38	1.64	1.51	1.63



Gaming influencers want brands to be bold, exclusive and... traditional

Question: Which of these do you want brands to be?
Source: GlobalWebIndex Q3 2019 **Base:** 44,160 total gamers aged 16-64

Notes on Methodology

All figures in this report are drawn from **GlobalWebIndex's online research among internet users aged 16-64**. Please note that we only interview respondents aged 16-64 and our figures are representative of the **online** populations of each market, not its total population.

OUR RESEARCH

Each year, GlobalWebIndex interviews over **688,000** internet users aged 16-64 across 46 markets. Respondents complete an **online questionnaire** that asks them a wide range of questions about their lives, lifestyles and digital behaviors. **We source these respondents in partnership with a number of industry-leading panel providers.** Each respondent who takes a GlobalWebIndex survey is assigned a unique and persistent identifier regardless of the site/panel to which they belong and **no respondent can participate in our survey more than once a year** (with the exception of internet users in Egypt, Saudi Arabia and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

OUR QUOTAS

To ensure that **our research is reflective of the online population in each market**, we set appropriate **quotas on age, gender and education** – meaning that we interview representative numbers of men vs women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education.

To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources.

This research is also used to calculate the "weight" of each respondent; that is, approximately how many people (of the same gender, age and educational attainment) are represented by their responses.

MOBILE SURVEY RESPONDENTS

From Q1 2017 on, GlobalWebIndex has offered our Core survey on mobile. This allows us to survey internet users who prefer using a mobile or are mobile-only (who use a mobile to get online but do not use or own any other device). Mobile respondents complete a shorter version of our Core survey, answering 50 questions, all carefully adapted to be compatible with mobile screens.

Please note that the sample sizes presented in the charts throughout this report may differ as some will include both mobile and PC/laptop/tablet respondents and others will include **only** respondents who completed GlobalWebIndex's Core survey via PC/laptop/tablet. For more details on our methodology for mobile surveys and the questions asked to mobile respondents, please download this document.

INTERNET PENETRATION RATES ACROSS GLOBALWEBINDEX'S MARKETS

GlobalWebIndex's research focuses exclusively on the internet population and because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe to lows of c.20% in parts of APAC), the nature of our samples is impacted accordingly.

Where a market has a high internet penetration rate, its online population will be relatively similar to its total population and hence we will see good representation across all age, gender and education breaks. This is typically the case across North America, Western Europe and parts of Asia Pacific such as Japan, Australia and New Zealand. Where a market has a medium to low internet penetration, its online population can be very different to its total population; broadly speaking, **the lower the country's overall internet penetration rate, the more likely it is that its internet users will be young, urban, affluent and educated**. This is the case throughout much of LatAm, MEA and Asia Pacific.

GLOBALWEBINDEX VERSUS ITU FIGURES

As GlobalWebIndex's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically.

Forecasts for 16-64s will be higher than our forecasts for total population, since 16-64s are the most likely age groups to be using the internet.

Notes on Methodology

INTERNET PENETRATION RATES

(GLOBALWEBINDEX'S FORECASTS FOR 2019 BASED ON 2017 ITU DATA)

This table provides GlobalWebIndex forecasts on internet penetration (defined as the number of internet users per 100 people) in 2019. This forecasted data is based upon the latest internet penetration estimates from the International Telecommunication Union (ITU) for each market that GlobalWebIndex conducts online research in.

Argentina	78%
Australia	88%
Austria	88%
Belgium	89%
Brazil	71%
Canada	94%
China	59%
Colombia	66%
Denmark	97%
Egypt	54%
France	85%
Germany	88%
Ghana	48%
Hong Kong	91%
India	42%
Indonesia	39%
Ireland	87%
Italy	62%
Israel	85%
Japan	92%
Kenya	43%
Malaysia	83%
Mexico	69%
Morocco	69%
Netherlands	93%
New Zealand	93%
Nigeria	36%
Philippines	64%
Poland	79%
Portugal	78%
Romania	72%
Russia	80%
Saudi Arabia	83%
Singapore	85%
South Africa	62%
South Korea	95%
Spain	87%
Sweden	96%
Switzerland	96%
Taiwan	83%
Thailand	58%
Turkey	71%
UAE	95%
UK	96%
USA	80%
Vietnam	55%

SAMPLE SIZE BY MARKET

This report draws insights from GlobalWebIndex's Q3 2019 waves of research across 42 countries, with a sample size of 44,160 total gamers among a global sample of 120,303 respondents.

● Mobile-only ● Casual gamer ● Esporter ● Socializer ● Cloud gamer ● Influencer

	● Mobile-only	● Casual gamer	● Esporter	● Socializer	● Cloud gamer	● Influencer
Argentina	140	270	150	67	81	16
Australia	538	478	279	105	120	30
Austria	173	115	90	37	44	13
Belgium	167	159	59	28	46	10
Brazil	259	438	339	207	214	41
Canada	342	337	192	80	76	26
China	1,529	1,417	1,782	928	710	209
Colombia	192	358	195	90	118	23
Denmark	170	128	70	22	51	7
Egypt	336	299	196	103	107	25
France	776	978	468	151	261	40
Germany	719	593	460	184	222	62
Hong Kong	262	249	157	82	79	24
India	805	910	919	519	486	158
Indonesia	285	369	315	197	150	43
Ireland	146	120	62	31	38	6
Israel	242	59	26	15	13	2
Italy	920	763	603	291	277	65
Japan	322	153	147	49	58	21
Malaysia	231	199	190	88	90	25
Mexico	286	579	411	157	210	40
Netherlands	215	126	62	20	43	6
New Zealand	168	178	98	45	45	14
Philippines	302	282	263	166	112	23
Poland	228	503	273	169	153	38
Portugal	159	223	107	54	78	10
Romania	66	164	107	72	59	10
Russia	481	776	382	126	123	18
Saudi Arabia	138	132	107	50	60	19
Singapore	518	303	221	118	99	21
South Africa	170	265	174	93	92	27
South Korea	328	91	212	54	70	17
Spain	665	1,075	624	267	427	96
Sweden	204	124	110	42	49	14
Switzerland	167	110	74	20	33	8
Taiwan	362	422	268	125	139	22
Thailand	503	391	357	203	197	59
Turkey	198	244	184	84	78	22
UAE	294	231	238	135	125	43
UK	1,633	1,336	722	332	380	84
USA	3,253	2,552	1,450	662	732	184
Vietnam	322	387	323	182	178	38

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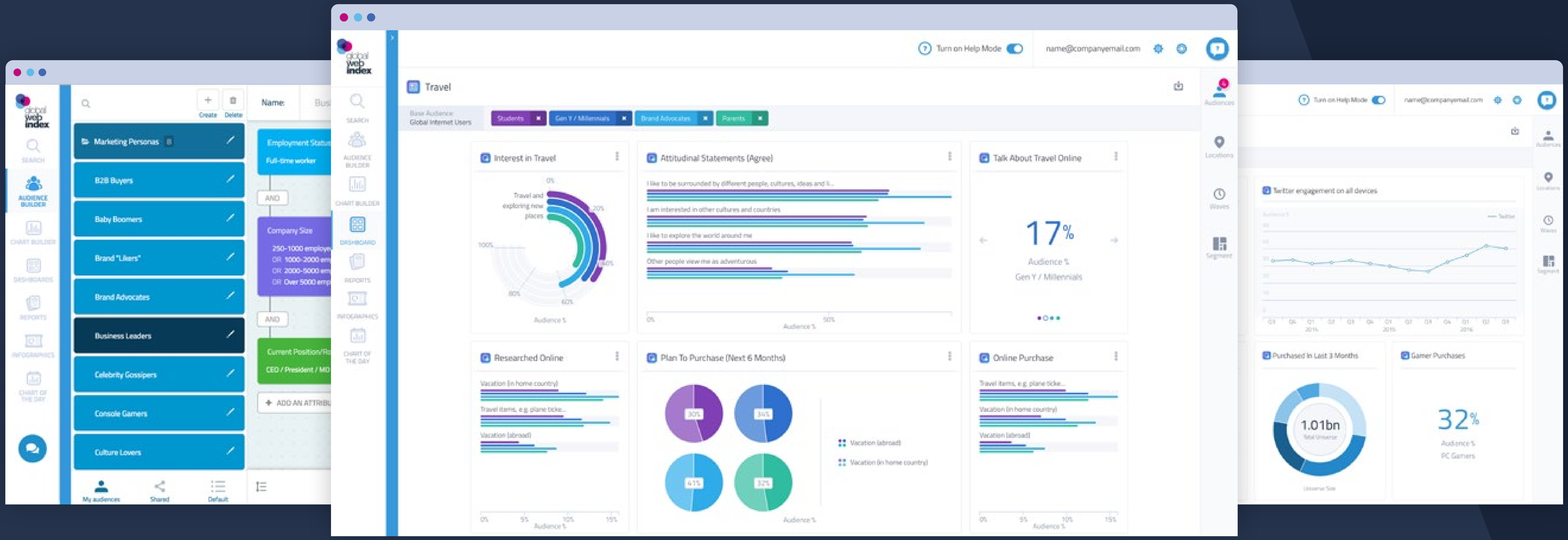

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