The gaming playbook

Everything you need to know about the gaming audience

GWI.

In this report

Methodology & definitions

Figures in this report are primarily drawn from GWI Gaming's online research among 19,488 internet users, who are gamers, aged 16-64. The survey is fielded in the following 15 markets: Australia, Brazil, Canada, France, Germany, India, Indonesia, Italy, Japan, Mexico, Philippines, Spain, Thailand, UK, and USA.

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, Asia-Pacific, and the Middle-East and Africa, low internet penetration rates can mean online populations are more young, affluent and educated.

Throughout this report we refer to indexes. Indexes are used to compare any given group against the average gamers (1.00), which unless otherwise stated refers to the global average gamer. 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.

When reading this report, please note that we use a mixture of data from our GWI Gaming dataset fielded in Q4 2020 across 15 markets, our GWI Core dataset which is fielded across 47 markets, and Zeitgeist data from the past 6 months which has been conducted in the U.S. and UK only.

Introduction

If it wasn't apparent before the COVID-19 pandemic, few could now deny what a juggernaut the gaming industry is – which is set to exceed **$200 bn** in revenue in 2023.

But for all the attention on gaming as a market, the profiles of individual gamers themselves have been less explored.

Profiling gamers by the device they use to play is one way of defining the audience – but often the most meaningful changes come when you analyze by franchise or genre. Fundamentally, each group has to be understood on its own terms.

This report uses our new dataset, GWI Gaming, to fill in some of the blanks. With research gathered across 15 countries, and making use of our recontact methodology to give us a 360 degree view into gamers' lives both on and offline, it offers an unparalleled depth of insight into the modern-day gamer.

As we will cover in this report, the "gaming audience" is something of a misnomer. Gaming comprises an ecosystem of varying subgroups and identities. There are people who play games, and they do so on different devices. Then there are people who consume gaming content, who may not play games themselves. Then there is esports, which is another thing entirely.

Whether you're a brand looking to crack into gaming, an agency looking to refine your expertise at targeting gamers, or a publisher looking for intel on how your players think and behave, this report aims to provide you with the tools you need.

This report focuses on:

A look at different revenue models – which goes far beyond the physical game. From understanding buyers of DLC and microtransactions, to the potential of persistent virtual worlds in franchises like *Fortnite* and *Roblox*.

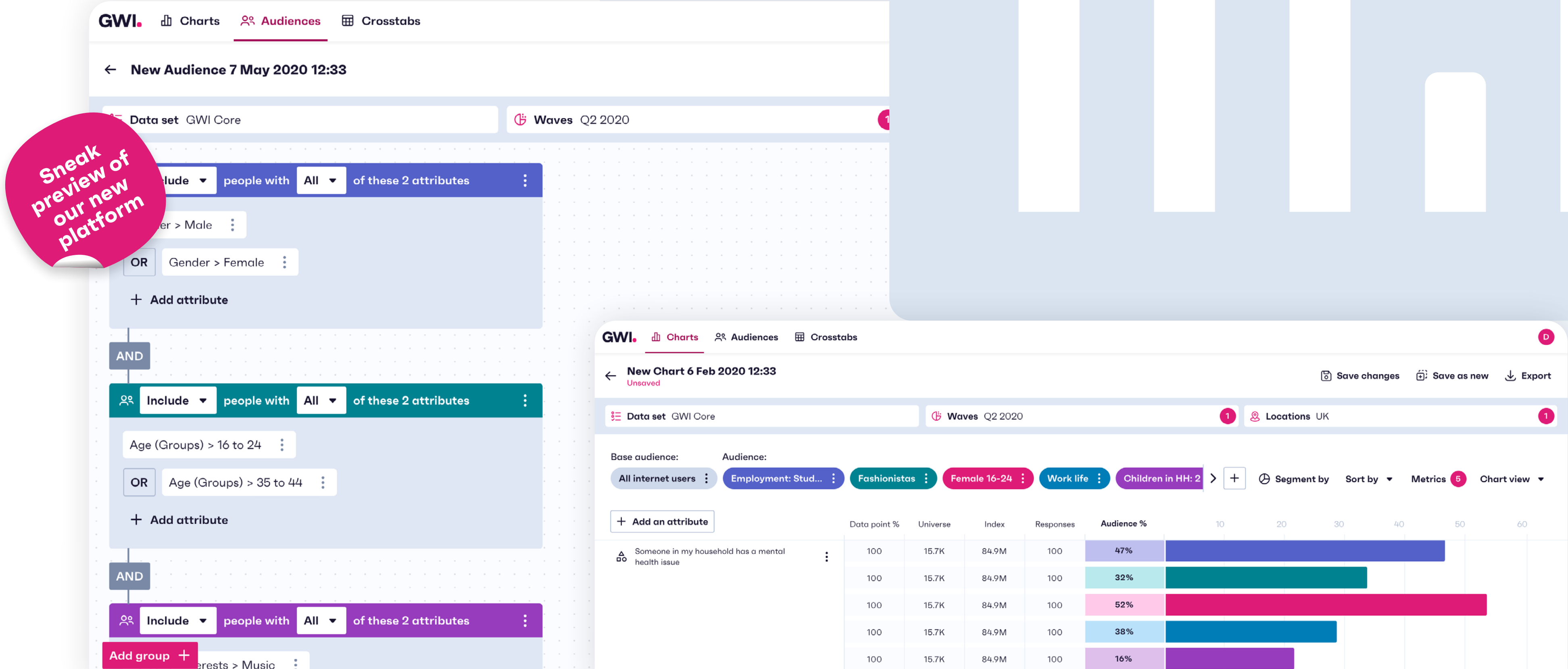
Analysis of what different gaming audiences look like, based on the device they use, the genres/franchises they play, and their engagement with other gaming content.

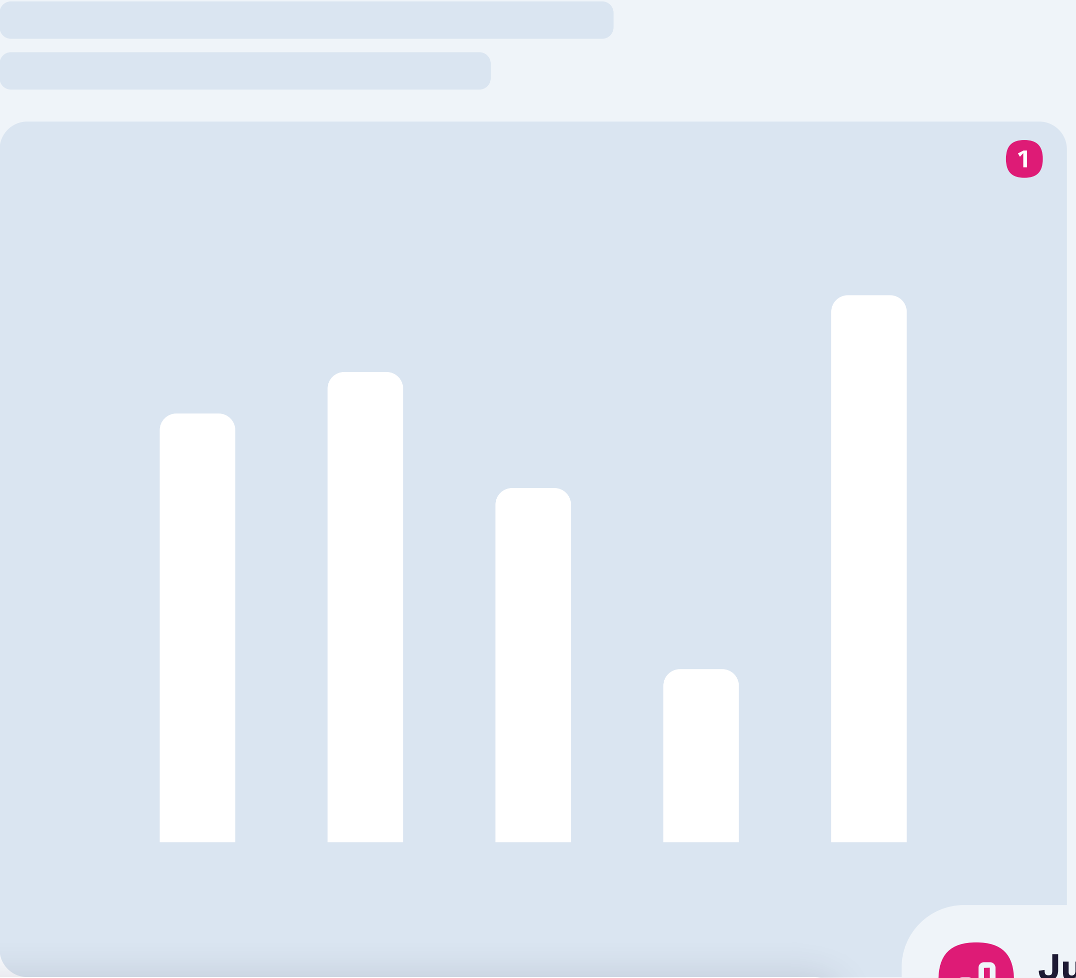
A deep-dive into the world of esports, understanding what matters to its audience and the opportunities for brands and investors.

The lay of the land in the console marketplace, and the potential of subscription services.

Discover the data on our platform

Each chart from our ongoing global research in this report contains a hyperlink that will bring you straight to the relevant question on our Platform, where you can investigate all data by demographics, over time, and among your own audiences.





Each of the graphs is numbered

More information can be found in the Appendix section at the end of this report

Just click this icon to explore the data on the platform

Source

Base

Information about the source and base

Click the dots to navigate

Key insights

There are more gamers around than you might think

The pandemic didn't create a legion of new gamers; it made us appreciate just how many people spend their time playing video games. But the last few years have seen some audiences picking up controllers in greater numbers, including women, family units, and those living in MEA.

Family units make for multi-console owners

With exclusive franchises found on different games consoles, multi-console adoption is becoming more commonplace; gamers don't want to be limited in the games they play. Console gamers with children, however, are 24% more likely to own 2 or more consoles, showing the appeal of different brands among select gaming demographics. The Switch is prevalent in this regard, despite PS4 ownership leading outright, Nintendo's device has seized on the "second-console" slot in a record-breaking year.

Video games are the initial hook – in-app purchases and add-ons keep them there

Microtransactions and DLCs have emerged as prominent sources of revenue in recent years. Many free-to-play games like *Fortnite* and *League of Legends* have made serious bucks off in-app purchases. But for any publisher looking to land with these more premium gamers, they firstly need a grasp on who's buying what. Did you know that female gamers purchase more microtransactions than other add-ons? This is likely due in part to their interest in brands offering customized/personalized products. Meanwhile, Xbox and Switch gamers are more likely to purchase any type of add-on compared to PS gamers. Understanding who's buying what, and why, matters.

Gamers with an active social presence will help spread the word

Gaming is a highly communal activity, even among the most casual gamers (those playing less than once a month) 31% say they did any of the gaming-related actions we track. Because gamers like to share or discuss their experiences with each other, those with the most active social media presence can prove important advocates for brands without historical ties to gaming.

Esports continues to grab gamers' interest and investment dollars

As engagement with esports grows, so do the opportunities for brands. But to play in this space, it's crucial to firstly understand the esports audience. They're far more diverse than you might expect; extremely community-oriented; and want brands to make them feel involved. The good news for brands is they're welcome of sponsorship – around 2 in 5 say it's OK for brands not related to esports to sponsor teams or events. Sponsorship stands to pay off, but to really engage this group, brands need to understand their unique culture and what matters to them.

01

Choose your character: a guide to gaming audiences

It's a cliché almost as old as video gaming itself, but the stereotype persists that gamers are young, often antisocial, men. It's an image that's been reinforced by negative depictions of the audience in TV and film.

While there is definitely a gaming subculture, gaming as an activity is much more widespread. COVID-19 gave us a glimpse into just how many people are gamers – even if they don't identify as one – as it became clear how valuable video games were as a source of entertainment under lockdown.

Here we show that the gaming audience is both bigger and deeper than you might think.

Gaming: a big deal even pre-COVID

The received wisdom is that COVID-19 sparked a gaming boom. For a while, it seemed like everyone was tending their islands on *Animal Crossing*, hunting impostors in *Among Us*, or struggling through knockabout obstacle courses on *Fall Guys*. Shortages of Nintendo Switches and PlayStation 4s (at the end of their lifecycle, no less) seemed to bear out the simple observation: everyone was gaming all of a sudden.

But in asking how many people started gaming because of COVID-19, we're asking the wrong question. The gaming audience was already there, in large numbers.

The gaming audience has always been substantial, and spanned more demographics than is often thought. Our data shows that 86% of internet users play games on any kind of device, and that figure has hardly changed since 2015.

With many other pastimes stripped away, the pandemic has highlighted just how many people take part in gaming. That's not to say it hasn't helped command more of people's time; 70% in the UK/U.S. who started gaming more because of the pandemic are still doing so.

Marketers are now increasingly aware of the size of the gaming audience, but its size can also make it intimidating. How do you begin trying to carve out an audience spread across different devices, franchises, and media?

On the page opposite we have provided a quick cheat-sheet to understand what they look like on a top-level basis, and throughout the report we will conduct deep-dives into these branches of gaming audiences.

A cheat sheet to gaming audiences

Devices	Audience size (%)	Avg. age	Gender: Male	Gender: Female	Interest in gaming (% extremely/very interested in gaming)	Gaming frequency (% who play every day)
Smartphone	76	33	55	45	58	37
Laptop	46	33	59	41	65	38
PC	38	34	66	34	70	39
Games console	37	34	60	40	72	39
Tablet	22	36	50	50	59	41
Handheld device	15	32	54	46	75	45
Mobile gamers*	81	34	55	45	57	37
PC/laptop gamers	65	33	61	39	64	37
Any device	-	34	55	45	55	35

Media	Audience size (%)	Avg. age	Gender: Male	Gender: Female	Interest in gaming	Gaming frequency
Esports viewers**	46	31	65	35	79	42
Livestream viewers***	38	31	63	37	74	42
Branded game players****	15	31	67	33	74	47

*smartphone & tablet
**watch esports content at least once a week
***watch gaming streams on Twitch or YouTube
****have played a branded game in the last month

GWI Gaming Q4 2020 | GWI Core Q4 2020 19,488 gamers in 15 markets aged 16-64

Leveling up: growing audiences

While gaming has been near-universal among the online population for quite some time, the gaming audience has still seen some pronounced demographic changes in recent years.

To best spot them, we have to refine our definition of gamers slightly, by focusing on an audience of internet users who say they have played from any of a list of 19 genres in the last 12 months. Many people are gamers, even if they don't realize it; this definition lets us focus on a more self-identifying gaming audience. This is still a large group (78% of the online population), but in gaming terms at least, it's more of an engaged one.

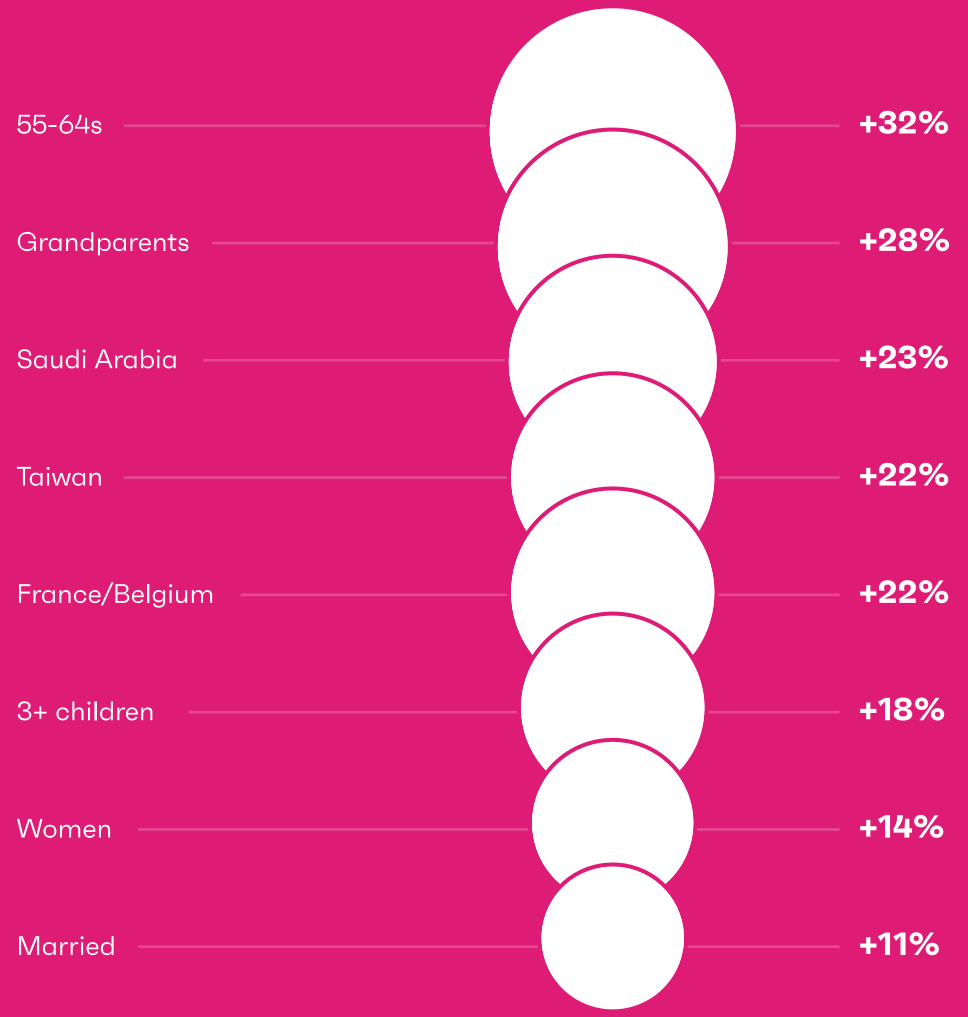
With this definition, we can see which demographics have increasingly taken to gaming in recent years.

Most obvious is older internet users, those aged 55-64. Gaming has become especially important to grandparents or those with 3+ children, which underlines its importance to family time. This also includes married couples; no wonder the franchise *Overcooked* has become established in some online circles as the ultimate litmus test of a relationship's success. Gaming has also shown good increases with women, which is further evidence that the gaming audience is more diverse than is often supposed. Whether this diversity is always reflected in the content is another matter, but the takeaway is obvious – the gaming audience isn't just bigger than often realized, but more inclusive as well.

We can also see how gaming has enjoyed big growth in an intriguing selection of markets, some of which show how it's taken root in unexpected places. Western Europe is one obvious hub, with France, Belgium, and Switzerland all growing significantly. Another is Saudi Arabia, where a young population, loosening regulations, and restrictions on other pastimes have combined to make it one of gaming's boom spots.

Where new gamers are coming from

% growth between 2018 and 2020 of people who have played at least one gaming genre in the following audiences



GWI Core Q3-Q4 2018 and Q1-Q4 2020 | 725,561 internet users aged 16-64

Leveling up: trending genres

Big changes haven't just come in who's playing, but the kind of games they want to play.

Since 2018, simulation, puzzle, and strategy have seen the biggest growths of any genre we track. These obviously point to the types of game most in-demand but in seeing them as a collective, we can identify some common emerging themes.

These are: immersion, competition, and cognition.

Immersion – *Fortnite* and *Animal Crossing* are the best examples of gamers looking for more immersive worlds. As seen by the increases for simulation, battle royale, and open-world games, gamers are increasingly looking to persistent virtual worlds as places they can inhabit.

Competition – Genres based on competitive multiplayer, like MOBAs, and particularly battle royale, have seen rapid growth. It's difficult to overstate the impact of *Fortnite,* not just in its own right but in how it's inspired other franchises. Servers are now much more comfortable hosting hundreds, if not thousands of players at once, creating more powerful social experiences through gaming software.

Cognition – Gamers are going a step beyond casual play. Characterized by problem-solving and reward mechanisms, these games are more of a "lean-forward" experience. Party and rhythm/music games have fallen in popularity as the pandemic has reduced the scope for local multiplayer. There are still plenty of casual gamers, but on the whole, we're seeing gamers look for more mentally stimulating experiences, likely exacerbated by the need to fill free time during lockdowns.

Trending genres

3

% growth of internet users who have played a game in the following genres in the last 12 months, since 2018

Genre	% growth
Simulation	+24
Puzzle/Platform	+15
Strategy/ Real-Time Strategy	+15
Battle Royale (since 2019)	+14
Action Adventure/ Open World	+13
Shooter	+13
MOBA - Multiplayer Online Battle Arena	+7
Party Games	-6
Rhythm/Music	-6

GWI Core Q3 2018-Q4 2020 | 1,218,817 internet users aged 16-64

Trend in action

Playtime

Instructive marketing case studies can be found in the fast-growing gaming hubs of APAC and MEA – especially for audiences outside the traditional gaming demographic.

In many cases, brands and agencies have cannily used games and gamification to tap into the family unit. Unilever **leveraged** an audience of gaming moms to boost sales of a hygiene toothpaste brand, Frisian Flag did something **similar** with its dairy-based products for children, and Saudi Telecom **reflected** a multi-generational gaming audience in its campaign to retain market dominance.

Games and play have always been a part of shared family time, and there's no reason why new technology would be any exception. These campaigns could just be the start. Could gaming be used as a touchpoint for couples filling out their first shared home, or for grandparents?

02

Deconstructing gameplay: what gamers are playing and why

In previous decades, gaming audiences seemed to occupy more defined niches. Consoles lived in teenager's bedrooms, PCs were for deeply committed techies, and when mobile gaming came along, many felt it was limited to women and other "casual" players.

Needless to say, times have changed. Consoles are living room fixtures and used as much for watching TV as playing games, multiplayer games can connect across devices, and mobile games have come a long way since *Candy Crush* broke onto the scene.

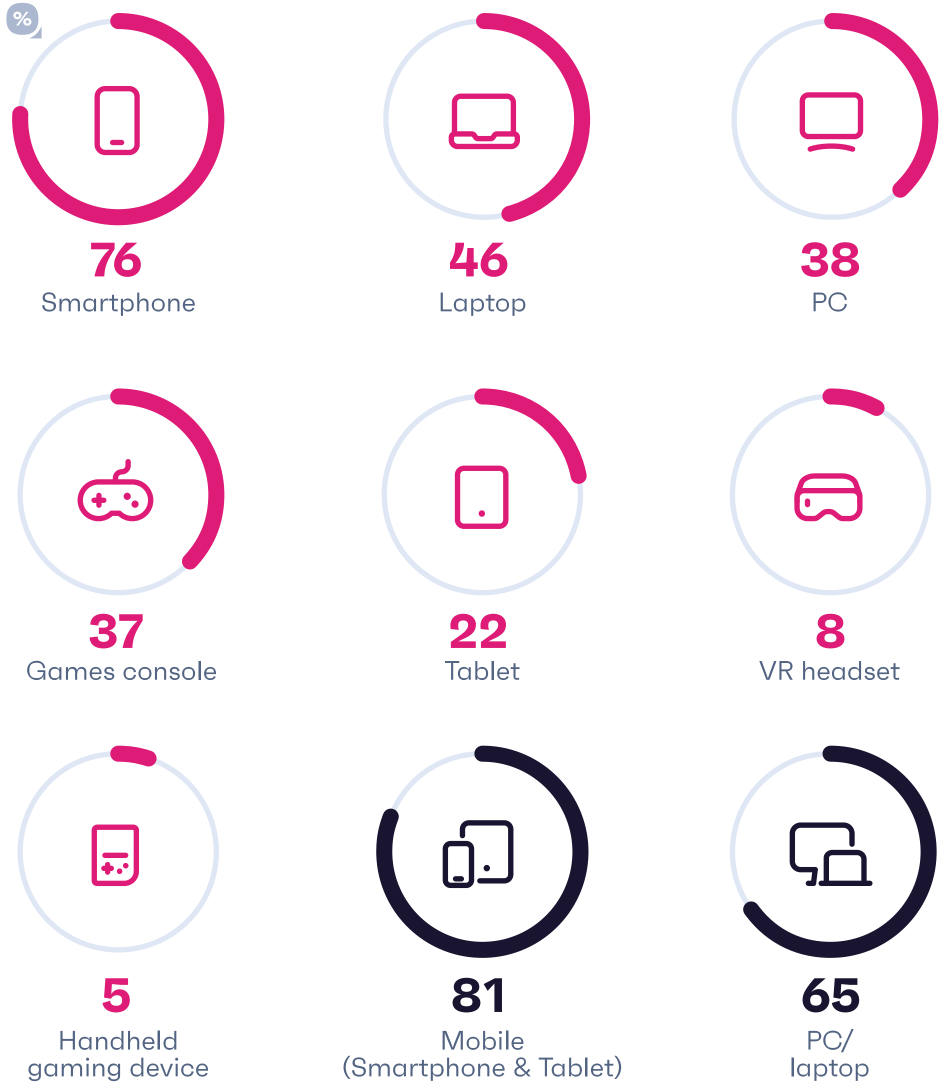
We can't take for granted what players of different devices look like, or what they want from games. In this section we explore what the gaming world looks like across different devices, and in the places where they merge, through cloud gaming and subscription services.

Device overview

Gaming device ownership

4

% of gamers who play games on the following



GWI Gaming Q4 2020 19,488 gamers aged 16-64

Gaming pros and cons

5

% of gamers who say they play games on the following devices...

..who also play games for the following reasons

%	Games console	Handheld gaming device	PC/ laptop	Smartphone	VR headset
For fun	70	60	67	65	61
For the challenge	36	38	34	31	48
For the storylines/narratives	28	33	22	18	36
To compete online	23	28	22	19	41
To escape from reality	30	30	26	23	37

..who also say the following are frustrations about gaming

%	Games console	Handheld gaming device	PC/ laptop	Smartphone	VR headset
Doesn't run smoothly	31	34	35	32	34
Too expensive to progress	33	36	32	31	33
Too hard to play	30	34	28	28	25
Doesn't match expectations	26	31	26	25	30
Lose interest	25	31	25	25	29

What gamers want

Found in the pockets of nearly every internet user, smartphones – bolstered by tablets – have catapulted mobile gaming into the forefront. For some time, these devices bore the "casual" moniker, deemed unfit for the competitive, large-scale gaming seen on the likes of consoles and PC/laptops.

Today, that's no longer the case. Thanks to rapid hardware developments, and **support** from big-name franchises such as *Fortnite* or *League of Legends*, mobile gaming now offers a wider range of experiences than the classic puzzles and platformers. Though mobiles are now accommodating of gaming, this is likely considered a bonus instead of an outright purchase driver.

A closer look at gaming motivations lends truth to this observation. With the exception of playing to relax or pass the time, gamers playing on mobiles are less likely to cite any of the 10 reasons for gaming we track than among those on other devices – they're not ticking all the boxes just yet.

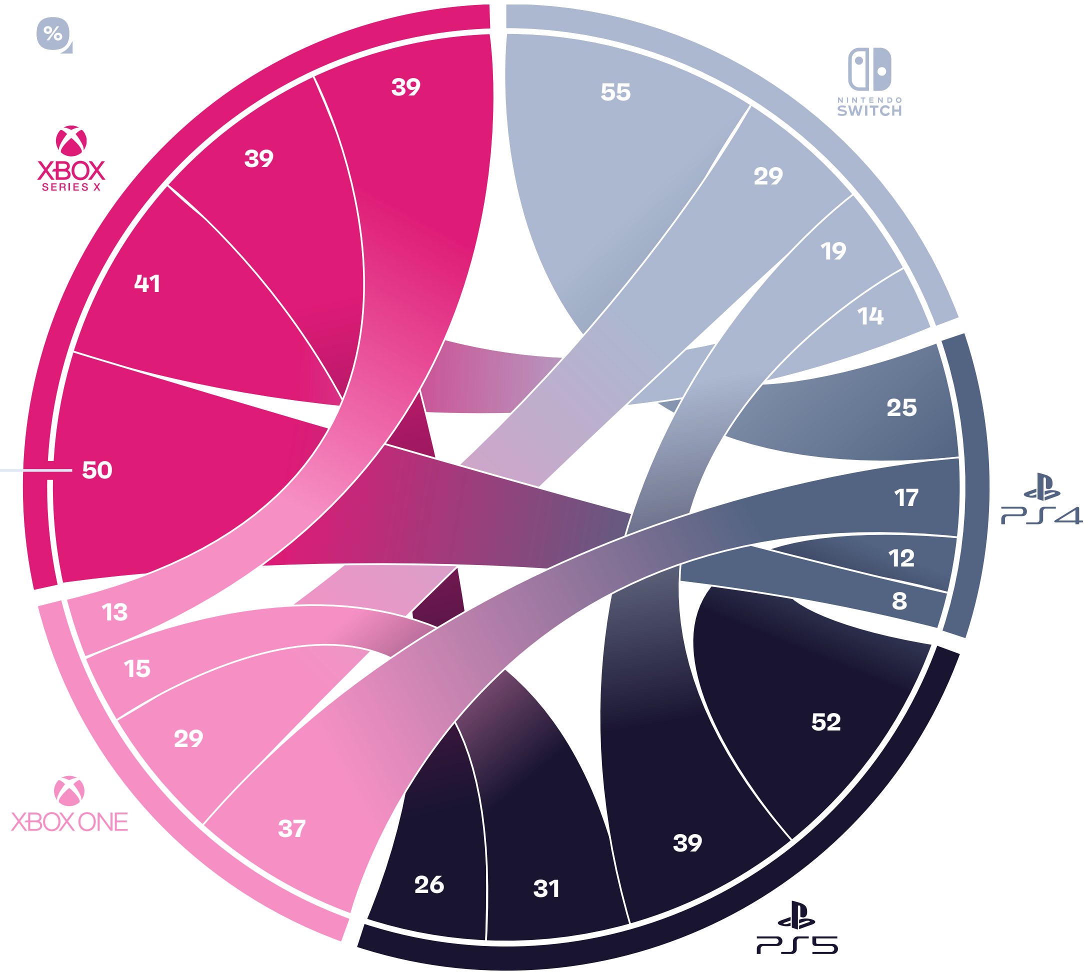
That's not to say consoles and PC/laptops are meeting every need either, but they're seemingly better-placed at present to accommodate committed gamers, more likely to be interested in gaming.

When it comes to specific frustrations, the biggest annoyances for gamers lies in device performance, expense, and game difficulty.

Want a closer look at consumer behaviors on mobile? **Try our platform for free.**

Multi-console ownership is not uncommon

% of console owners who also own the following consoles



Example of how to read

50% of **Xbox X** owners also own a **PlayStation 4.**

8% of **PlayStation 4** owners also own an **Xbox X.**

GWI Gaming Q4 2020 7,426 console gamers in 15 markets aged 16-64

Consoles: a close up

Games consoles, a mainstay of living rooms worldwide since the Magnavox Odyssey was released in 1973, have endured well into their 9th generation – ushering in the Xbox Series X and PS5.

Requiring a one-time purchase and no additional hardware upgrades, games consoles are typically more cost-effective in the short-term than the likes of PCs. They're an accessible way for newcomers to get into gaming, while retaining players at the same time – 39% of PC/laptop gamers say they play games on consoles. Moreover, there are historic examples of console-priority; *GTA V* launched months ahead of the PC version or, in the case of *Timesplitters*, never launched at all. As such, competition in this landscape is fierce, with console wars today fought between three major contenders: Sony, Microsoft, and Nintendo. While many are quick to take sides, franchise-exclusives such as *Mario*, *Halo*, and *God of War* have made multi-console ownership more common – meaning manufacturers have an opportunity to seize upon the "second-console" slot, particularly among gamers outside their loyal player base.

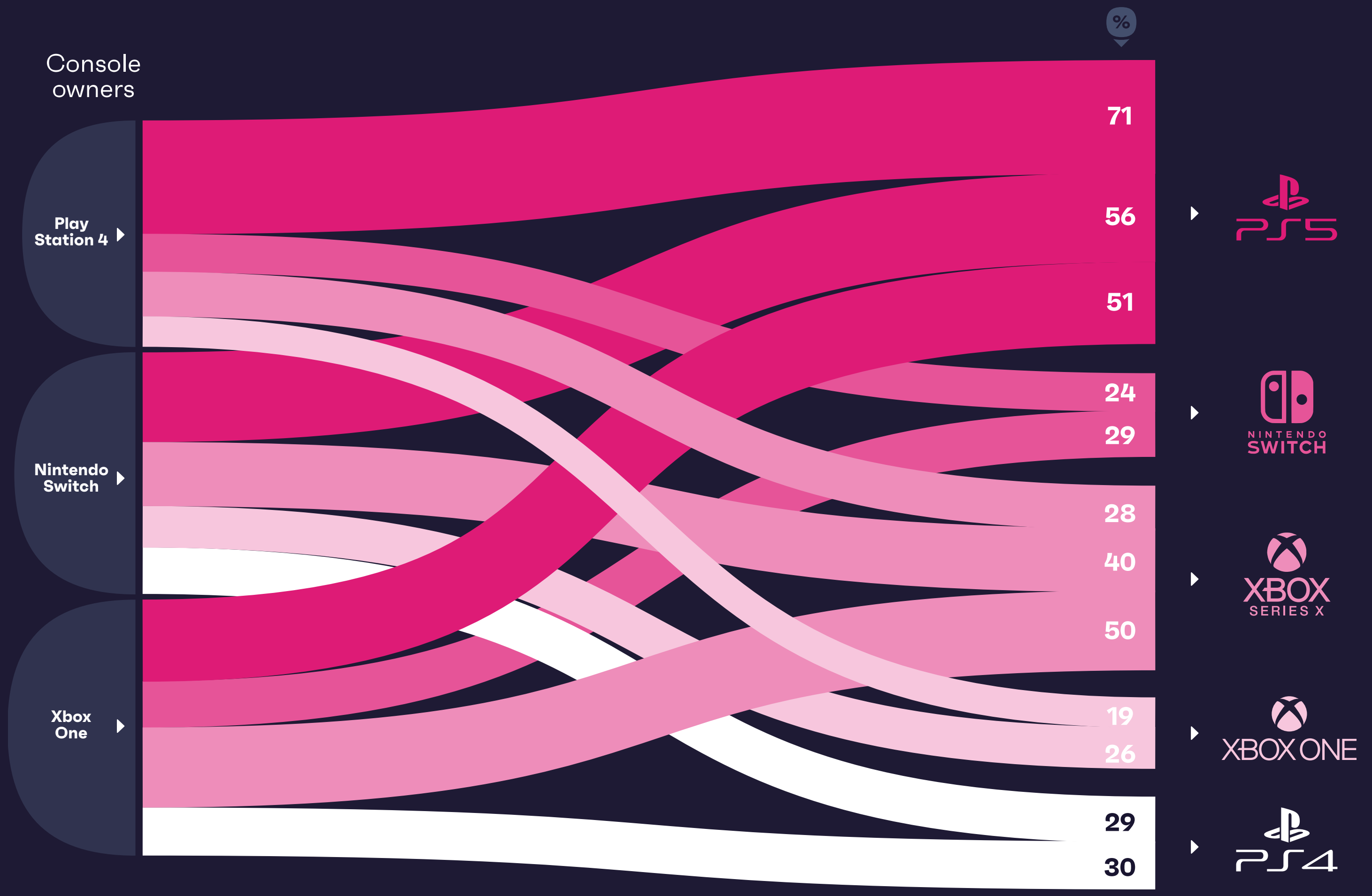
Multi-console ownership is prominent among family units – gamers living with their children are 24% more likely to own any 2 of the most popular games consoles. It's not just gaming that's driving this; with access to numerous streaming services, consoles make for fitting media devices in a family home.

Our data generally points to Nintendo as the favorites in this regard. Despite the PS4 leading the way, Switch ownership is prevalent among all console audiences – particularly ones with families. However, the prominence of PS4 and Xbox One ownership among PS5 or Xbox Series X owners, respectively, suggests loyalty is a more enduring factor in future console adoption.

This is made clearer from purchase interests, with current PS4 or Xbox One owners likely to consider purchasing their next-gen equivalents. Though the Switch falls behind here, Nintendo **achieved** record-breaking sales in 2020; potentially the go-to choice as supply issues continually plagued the PS5 and Xbox Series X.

Next-gen devices are swaying console audiences

% of console owners who are also interested in purchasing the following consoles



GWI Core Q4 2020 19,724 console gamers aged 16-64

Outside of smartphones, PC/laptop is the preferred gaming device among Gen Zs and baby boomers

PC Gaming

With various manufacturers competing, PC/laptop gaming makes for a highly competitive and tribal landscape – potentially more so than seen on consoles. Given their tendency to over-index for an interest in computers/coding or technology, PC/laptop gamers are generally more tech-savvy than other gaming audiences, making it crucial to emphasize the hardware capabilities of new devices.

In addition, this stronger relationship with technology promotes greater attempts to retain privacy or avoid misuse of their personal data. Even if these actions are universal, PC/laptop gamers are more likely to perform any of the preventative measures we track (using VPNs, ad-blockers, or private browsers), meaning that authenticity and clarity from anyone engaging with this audience is a must.

Cost, however, is a different factor. The general perception of PC/laptop gaming is that it's more expensive than other devices. There's some truth to this; upgrading a PC/laptop from the ground-up can be more pricey than purchasing a next-gen console, but our data shows gamers on the latter generally make for higher-earners. In addition, there are extensive uses for PC/laptops outside of gaming, meaning the 2 in 3 internet users, worldwide, who own these devices don't necessarily need to make an additional financial commitment to gaming.

The key difference is one of longevity. Ignoring the likes of emulators – which can run games from virtually any device on a PC – services such as Steam, Origin, and Uplay give PC/laptop gamers a platform to purchase historic franchises as well as new ones, limited only by their hardware capabilities. Because gamers can upgrade their devices over time, access to a new release isn't necessarily restricted behind a big-ticket item.

Top PC/laptop brands

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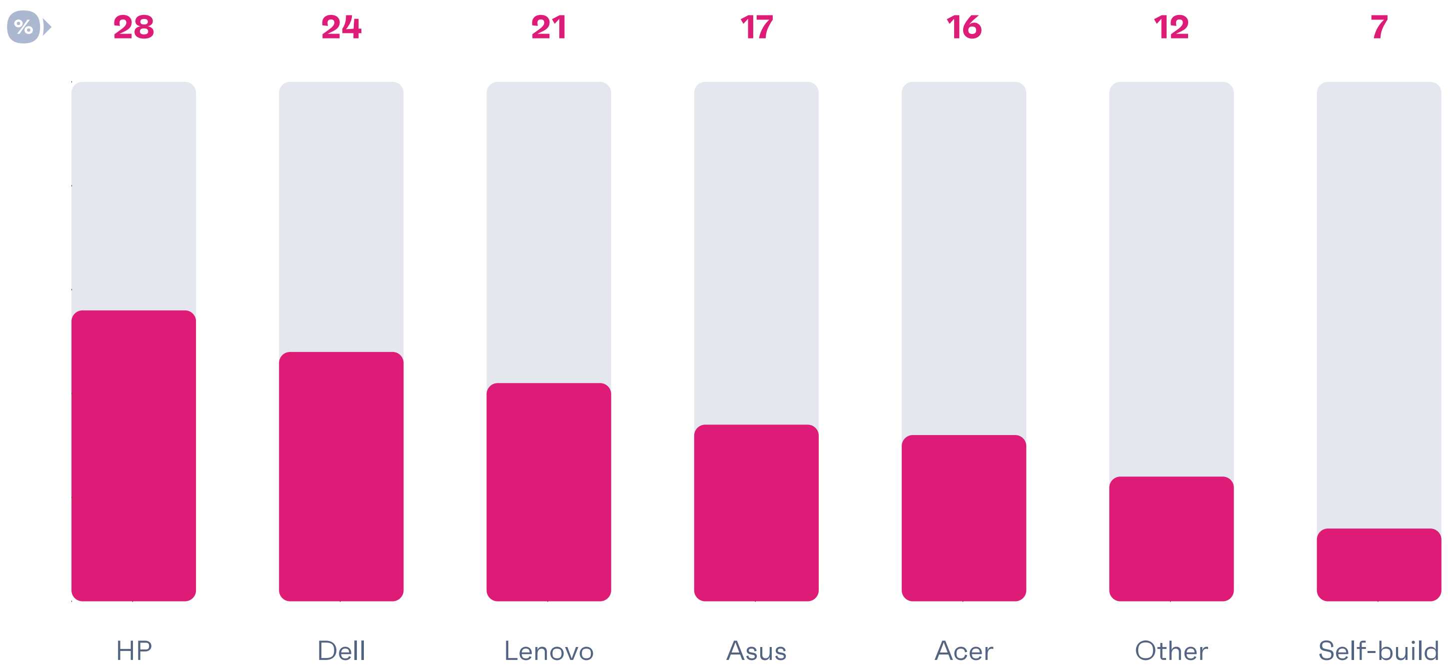
% of PC/Laptop gamers who own the following brands



GWI Gaming Q4 2020

11,429 PC/laptop gamers in 15 markets aged 16-64

Subscription services

Having been prominent on PCs for some time, online gaming quickly became a mainstay on all gaming devices. For some, it's a vital component of gaming; 26% of all gamers play to socialize with friends (difficult without access to online multiplayer), while being essential to multiplayer-only genres such as MMOs, MOBAs, and battle royale.

Today, online multiplayer is often part-and-parcel with subscription services; offering paying gamers regular news updates, free games, or exclusive discounts via online marketplaces. Moreover, there are also cloud-gaming services; subscription services such as Xbox Game Pass or PSNow, that provide access to libraries of older games.

With subscription services largely optional, it's difficult to declare an outright winner. There are also many factors to take into account, particularly with audience sizes varying by device and brand, but subscription users are generally frequent gamers with more spending power.

With this in mind, a closer look at current subscription service use reveals interest in purchasing these services is on the rise. A decline in physical video game sales plays a large role here – falling 13% among console gamers between Q1 and Q4 2020 – meaning digital is now the dominant medium, with 22% buying a game via a digital marketplace in the last month.

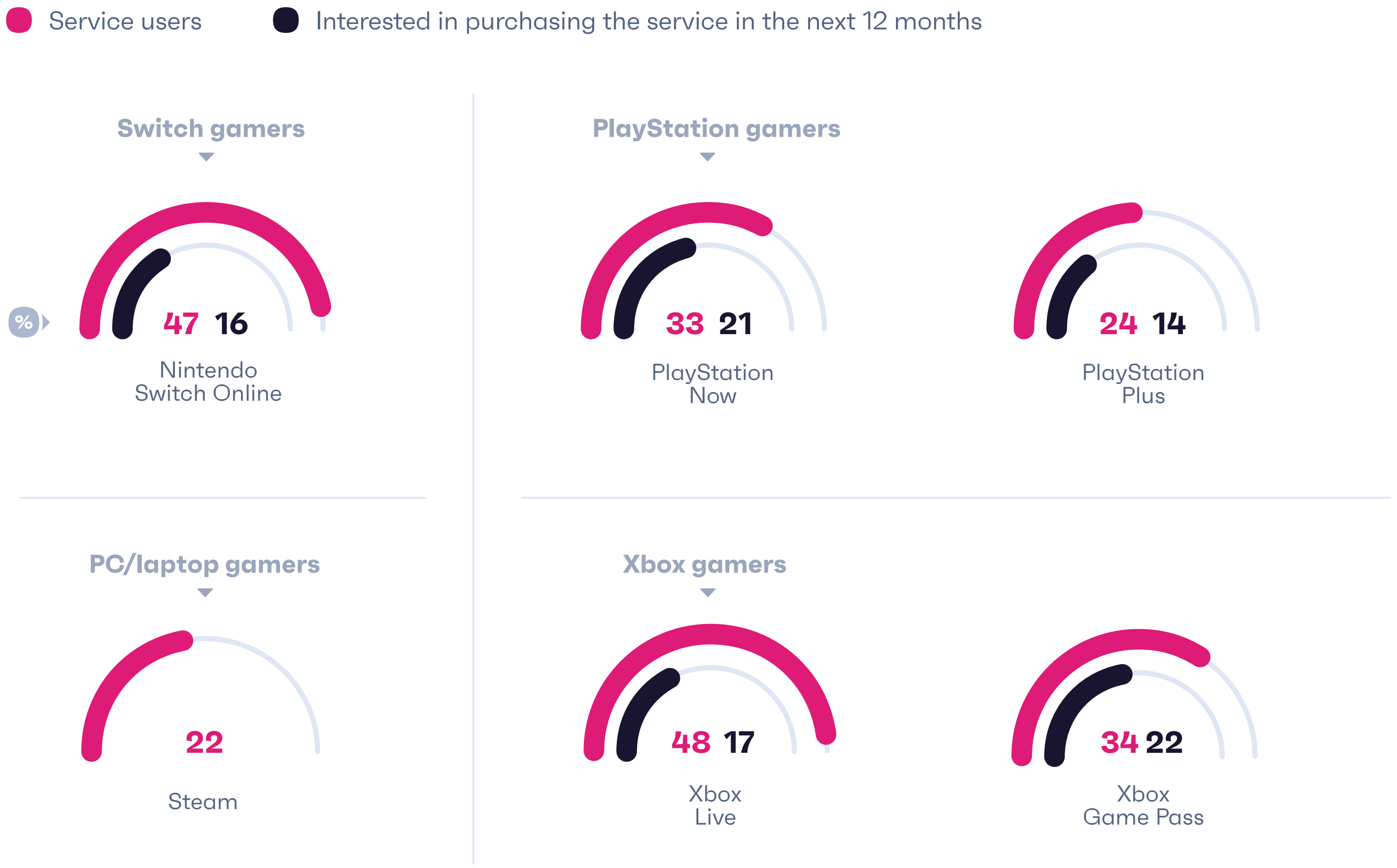
This is significant for Sony and Microsoft, whose cloud-gaming services were central selling points ahead of the PS5 and Series X launches in 2020. In addition, digital-only versions of the two exist to cut initial costs and drive engagement with their own cloud-gaming services instead.

It's worth noting, however, the **potential impact** of free-to-play titles such as *Fortnite* or *Call of Duty: Warzone*. Cloud gaming may prove a turning point in the console wars to come, but free-to-play titles may have an impact on what pricing structures gamers are willing to accept, making monthly charges a harder sell in the mass market.

48% of gamers use subscription services, rising to 56% among those who play every day

Gamers are opting to expand their experience

% of console gamer groups who use the following services



GWI Gaming Q4 2020

1,896 (Switch), 5,167 (PlayStation), 2,783 (Xbox) console gamers and 11,429 (PC/laptop) gamers aged 16-64

Trend in action

Cloud gaming and the past

The release of the PS5 and Xbox Series X marks the dawn of the digital-console era. For a lower price, gamers can instead purchase the PS5: Digital Edition or the Xbox Series S – different names for what is essentially a console without a disc drive.

Backwards compatibility has always been inconsistent between consoles, but the move from disc drives to digital effectively means shutting the door on any older games that aren't re-released digitally. Onboarding past titles to cloud-gaming services, however, may be a selling-point in the future.

While it's important that gamers have access to online marketplaces or cloud-gaming services when purchasing **modern titles**, 14% of console gamers own a retro console of any kind – amounting to roughly 50 years' worth of content. In the case of Google Stadia, looking to past or popular franchises elsewhere has **taken priority** over producing in-house games; there's a wealth of potential in retro gaming that cannot be understated.

While Sony, Microsoft, and Nintendo have work to do in onboarding their own historic archives, third-party cloud gaming services, like **Antstream**, are proving the demand for arcade classics isn't limited to one device or brand. As with any game, there are communities devoted to these forgotten titles, signaling the importance of preserving even today's biggest franchises for the future.

03

Bonus round: enhancing the gaming experience

Pricing of video games used to be straightforward. Aside from arcades and rentals, most of the marketplace could be boiled down to: you buy a disc at a single price and it's yours until you get bored.

But to simplify a great deal, the gaming market has split in two different directions. On the one hand, AAA games can now cost as much to make as Hollywood blockbusters. On the other, there's an established freemium model where extra features can be bought, either for cosmetic purposes, or to help with the game.

In either case, our research can help publishers identify the segments of their player base, and help other stakeholders get a grip on microtransactions and sponsored content.

The appeal of in-game purchases and add-ons

Both microtransactions and downloadable content (DLC) have emerged as prominent sources of revenue. Many free-to-play games, like *League of Legends* and *Fortnite*, have made their money through in-app purchases, which are often cosmetic items like new costumes for characters or level upgrades. To put it into context, Activision-Blizzard made $1.95 bn in revenue between July and September 2020 – a whopping $1.2 bn of which came **solely from in-game microtransactions.**

There's clearly plenty of opportunities here, but for any publisher looking to land with these more premium gamers, it's crucial to firstly understand who's buying different types of add-ons to reach them effectively.

Age obviously plays a big role, with younger generations being far more likely to buy microtransactions, DLCs, and season passes than older generations. Close to 30% of Gen Z and millennial gamers have bought microtransactions in the past year, making this their most popular add-on. Microtransactions also have appeal across gender, with around 1 in 4 male gamers and 1 in 5 female gamers purchasing this type of add-on. Female microtransaction buyers are 20% more likely than the average gamer to want brands to offer customized/personalized products (38% do) – something which microtransactions allow them to do.

By device, console gamers are more inclined to spend on all types of add-on content compared to PC/laptop or mobile gamers. Again, microtransactions hold similar appeal across devices, but for mobile gamers it's the sweet spot; largely because many popular free-to-play mobile games adopt this revenue strategy.

Looking at specific console users, Xbox and Switch gamers are more likely to purchase any type of add-on than PS gamers. One reason for this might be down to Xbox's Game Pass, which allows users to access a number of games and play across different devices – creating more touchpoints for purchases. The Switch's popularity is largely tied to a limited number of games like *The Legend of Zelda: Breath of the Wild*, *Super Smash Bros.*, *Pokémon Sword and Shield*, and *Animal Crossing: New Horizons*. All of which are extremely popular, community-centric games with the option of in-app purchases and DLCs.

The majority of gamers across 14 markets say they spend less than the equivalent to $10/£10 per month on games/in-game purchases. However, around a third of gamers in 9 countries say they spend between $11-$50 per month, while 1 in 10 gamers in the U.S., Japan, and Mexico say they spend the equivalent of $50+. Those who spend more than the equivalent of $50 are more likely to be high-earning male millennials.

Add-ons are big business, but to avoid getting on the bad side of gamers, they need to be meaningful and pricing needs to be transparent and fair – nobody wants to feel duped.

1 in 4 gamers have purchased microtransactions in the past year

Add-ons are driving big bucks

% of the following gamers who say they've purchased these add-ons in the last year

%	By device: Console gamers	PC/Laptop gamers	Mobile gamers	By console: Xbox gamers	PlayStation gamers	Switch gamers
DLC for a video game	27	20	16	36	30	40
In-game currency for in-game content	30	28	26	37	32	38
Season pass	24	21	18	32	26	31

GWI Gaming Q4 2020

7,426 (Console), 11,429 (PC/laptop), 13,212 (mobile) gamers & 2,783 (Xbox), 5,167 (PlayStation), 1,896 (Switch) console gamers aged 16-64

Accessories also spark purchase consideration

% of the following gamers who say they're considering purchasing these devices/accessories in the next year

%	By device: Console gamers	By device: PC/Laptop gamers	By console: Xbox gamers	By console: PS gamers	By console: Switch gamers
Gaming chair	26	24	31	28	31
Gaming headset (with microphone)	26	24	32	29	30
Gaming keyboard	23	24	28	26	27
Gaming mouse	22	24	27	25	26
Gaming mousepad	17	17	22	19	23
Steering wheel	18	16	23	21	21
VR headset	26	22	30	30	29

3 in 10 Xbox and PS gamers plan to buy a VR headset in 2021

GWI Gaming Q4 2020

7,426 (Console), 11,429 (PC/laptop) & 2,783 (Xbox), 5,167 (PlayStation), 1,896 (Switch) console gamers aged 16-64

> Gamer audience targeting is a hot topic for the majority of advertisers today and has been massively accelerated by the pandemic.
>
> Who is a gamer? The answer is almost everyone, even if they don't identify as such. Mobile gaming makes up 2.5bn of the 2.7bn global gaming market and incorporates almost every demographic imaginable.
>
> For brands looking to incorporate in-play advertising to their marketing plans, there is more than likely a strategy to help you reach your target audience. Gamers are in a unique environment, so having fun, non-intrusive, in-play billboard ads are a good place to start. They need to work with the context of the game but if done right, they can be a great way to build an emotional brand connection with consumers.

Nina Mackie, Global Agency Partnerships Director, Admix

Trend in action

Redefining play

Imagine a persistent, virtual world where events happen in real-time; inhabited by individuals who are free to explore, change and interact, all the while contributing to a shared experience.

Such a concept already exists: the Metaverse. While not strictly tied to gaming – Facebook's Horizon project is approaching it from a social perspective – the success of games such as *Minecraft*, *Roblox*, and *Fortnite*, are already changing the way people interact with games, signaling huge implications for brand involvement.

Conventional in-game advertising relies on the use of dynamic assets; rapidly updating billboards based on how many players see them, for example. In a virtual world, messaging can translate into a **first look** at an upcoming movie, **political banners** draped across a player's home or the very clothing their avatars wear.

The key to a successful Metaverse is rooted in expression; gamers will stretch gameplay mechanics in their own way. In *Minecraft*, for example, fans have successfully built **functioning computers**, all within the game – far beyond the original "survival" concept. Developers need to consider how player actions will affect the future of these worlds, giving them the tools necessary to create, express and explore.

As the concept and the media IPs associated with it are so new, research into how marketing on these virtual worlds could work is thin on the ground. But by analyzing our tracked gaming franchises, we can pick up clues as to which are most prepared to go deeper into these non-gaming experiences.

Animal Crossing, *Fortnite*, *Minecraft*, and *Roblox* players, for example, generally show greater interest in live events or make payments for in-game content. They are also more likely to cite gaming as a good way of making friends at the same time.

04

Player 2 press start: the gaming community online

Gaming has always been one of the most popular genres of online content. r/gaming is the 4th biggest community on Reddit, while YouTube's most-subscribed single creator channel (PewDiePie) made his name with Let's Plays.

For publishers, the potential in leveraging an audience of advocates to build buzz around games, and increase engagement, is huge. But it has to be done in the right way, by understanding how they think and behave online.

Profiling the ecosystem of gaming

Gaming rarely stops at playing games; there's a vast ecosystem of custom content, online communities, and experiences to be aware of, and targeting gaming audiences requires as much an understanding about these behaviors as their motives for playing in the first place.

Even the most casual audiences, those who play less than once a month, have a voice – 34% say they did any of the gaming-related actions we track. While frequent gamers, or those with a busy social media presence, are more likely to do any of these, all gamers are vocal and brands need to be listening.

By looking at these gaming-related actions as collectives, we can better observe the online hideouts and behaviors of gaming sub audiences. These are:

The passives - Gamers practicing the most fundamental advocacy or extra-engagement behaviors, these individuals recommend games to friends or watch streamers on YouTube. Their experiences and opinions are formed from close acquaintances or through branded content, but are rarely posted online for others to see.

The critics - Those found blogging about games, writing reviews online, participating in online communities or posting on social media. A more vocal audience than passive gamers, they can be influential for shaping the opinions of others elsewhere.

The streamers - Found streaming their games or uploading footage to video-sharing platforms; they're comparable to critics, but typically more informed.

Gaming activities extend beyond the last level

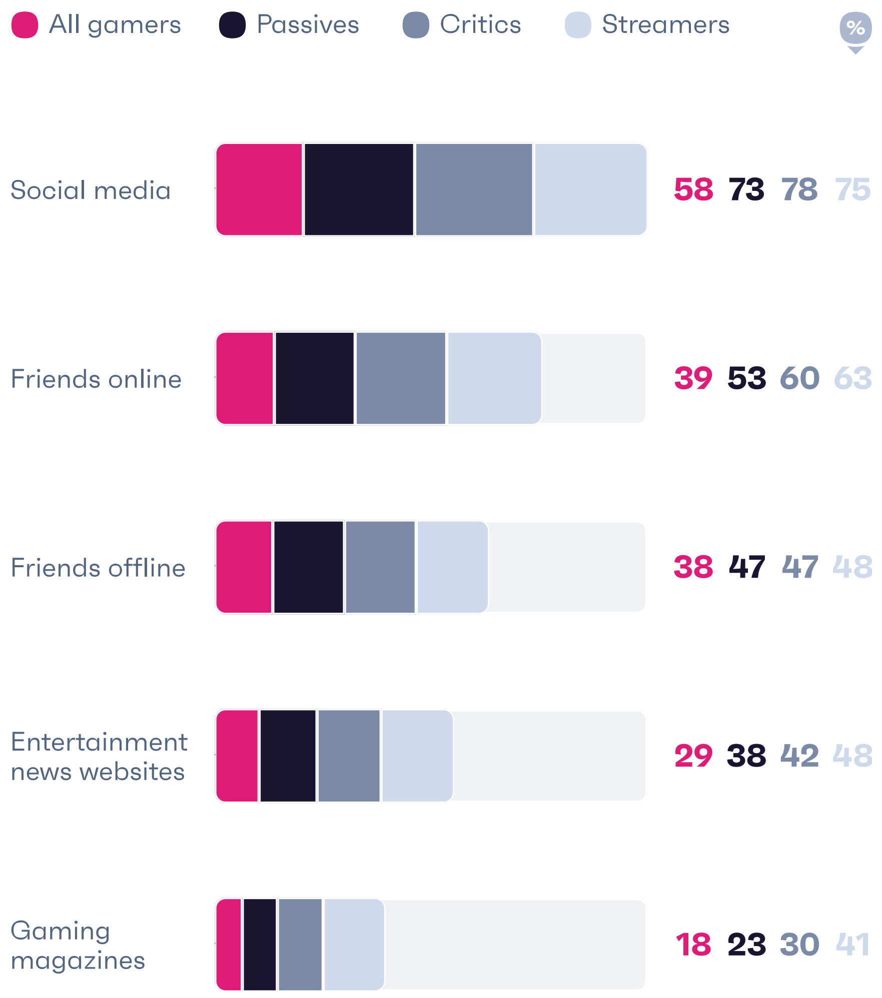
% of gamers who say they do the following

GWI Gaming Q4 2020 19,488 gamers in 15 markets aged 16-64

Vocal or committed gamers rely more heavily on varied sources

13

% of gamers who say they get gaming information from the following



GWI Gaming Q4 2020

19,488 (all gamers), 9,173 (passives), 6,249 (critics), and 2,722 (streamers) aged 16-64

The information journey

Social media should be considered the most universal source of information or expression when it comes to gaming. At the same time, friends – found on or offline – remain heavily influential on gamers. In Germany, offline friends are the leading source of information (40% say this), beating out social media by eight percentage points.

It's worth noting that friend groups can make for important purchase drivers in gaming. Knowing something comes recommended from a friend, with the same gaming interest, is always going to be important. Given online friends are a mainstay source of even the most informed gaming audiences, reaching the social circles of these groups should be a priority.

Though entertainment sites and gaming magazines fall to the wayside among passive audiences, we must consider how these, eventually, factor into their relationship with other sources. Considering the prevalence of each among critics or streamers, their opinions and content will likely filter down to passive audiences via YouTube or shared articles on social media.

Passive consumers should then be considered the last stop for gaming content, typically citing social media or word-of-mouth as methods of product discovery or social media in their product research. Critics or streamers, with a broader range of sources, can then be relied on to mobilize content elsewhere while giving reliable feedback to their followers.

Want to know the full role social media plays? **Here's our latest in-depth report.**

Building a team

Critics and streamers can make for important advocates in the gaming landscape, with sponsorship uncommon among historic gaming brands. For those making first contact with gaming, however – the non-endemics sizing up this space – aligning with these informed audiences can offer a serious advantage against competitors. Moreover, platforms are **experimenting** with tools to make this process easier; it's important to gain their support, but matching with the right partner is crucial.

Knowing critics and streamers are more likely to explore more social media than passive gamers, big hitters like YouTube, Facebook, Instagram, and Twitter should already be a priority.

Given the scale of their respective user bases, however, targeting these sub-audiences will inevitably require more understanding than the likes of Snapchat, Reddit, or Discord – where, given the prevalence of critics and streamers, communities are less congested.

With this in mind, brands will need to think carefully about how they use different platforms too; using them indiscriminately ignores the potential of would-be brand ambassadors – the critics and streamers. Each of these groups over-indexes for wanting brands to provide more insider information, or better develop one-on-one relationships with consumers – something made easier by their frequent use of less common social platforms.

Down the line, their prominent use of all social media services means advocacy can quickly funnel to their friends, circles, and resulting followers. This should also act as a cautious reminder, however, not to cast favoritism on select groups; such as Bethesda's *Fallout 76* release benefitting influencers with higher quality **merchandise** than that of regular audiences. News travels fast among gamers, but it's not always good.

Informed audiences make for powerful ambassadors

% of gamers, who use social media, that use the following services for gaming information and content

%	All Gamers	Passives	Critics	Streamers
YouTube	84	89	89	91
Facebook	72	73	78	81
Instagram	58	61	67	72
Twitter	40	43	47	52
Twitch	16	19	20	25
TikTok	14	15	18	24
Discord	14	15	18	24
Reddit	14	15	17	21
Snapchat	13	14	18	25

GWI Gaming Q4 2020 9,025 (all gamers), 6,111 (passives) 4,566 (critics) and 1,944 (streamers) who use social media, aged 16-64

05

Well played: the world of esports

To get a sense of esports' reach, consider this: worldwide, a Gen Zer is more likely to watch esports tournaments than they are to watch the NBA, the UEFA Champions League, or Formula 1.

Expanding across multiple genres and franchises, esports is as accessible as regular gaming. Esports **societies** at colleges are getting more attention, while hardcore e-athletes compete for record-breaking prize pools – attracting millions of viewers online.

More and more brands are eyeing up esports for its potential to connect with a desirable demographic and forge new relationships. But to do so requires getting to grips with an audience that's not always appreciated for its depth. Followers of different leagues, teams, clubs, and games franchises, as well as the different demographics watching, all bring different sensibilities.

Getting to grips with the esports audience

Over the years, esports (professional competitive gaming) has evolved into an established form of entertainment in its own right. Revenues are predicted to reach almost **$1.8bn** by 2023 and total esports viewership is expected to reach **646 million** by the same year. As the pandemic curtailed live events, particularly for traditional sports, esports and gaming helped to fill the entertainment and social void left behind.

But brands looking to get involved have to understand its vocabulary and culture through getting a better understanding of its audience. Who are they? What makes them unique? How do they feel about sponsorship? What do they want brands to do? These are all questions we're going to unpick to help gaming companies, esports organizations, and potential investors better navigate this space.

In terms of age profile, Gen Z and millennials, unsurprisingly, show the greatest interest in esports. But even among older Gen X gamers, 38% are esports followers – it's not just a young person's game.

Traditionally, esports has been perceived as a male-dominated space, with women largely taking a backseat. This view is obviously outdated and alienates a sizable audience. 42% of female gamers are esports followers, which is not too far behind their male counterparts at 58%. Gaming has certainly become more inclusive over the years, but arguably there's still room to improve. Esports followers' attitudes also strike a progressive tone. Over half of esports followers like games with strong female characters (29% more likely than the average gamer), and 35% of esports followers follow a female esports player or team on social media.

This group is also heavily community-focused, willing to spend on premium products, and show greater receptiveness to ads. For example, esports followers are 52% more likely than the average gamer to say they buy products/services to access the community built around it (1 in 4 do). If brands manage to utilize this, they may be on to a winner with this highly desirable audience.

40% of esports followers consider gaming as a legitimate a pastime as sport

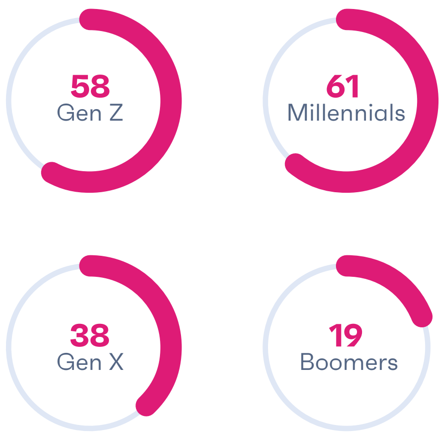
Esports followers: who and where are they?

15

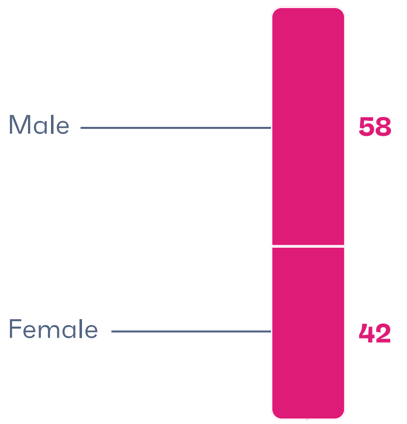
% of gamers who are esports followers*

Younger gamers lap it up

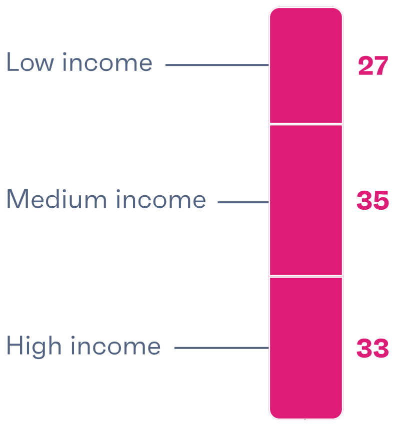
%



Mostly male, but not by much



More likely to be affluent



Community-driven, tech-oriented, & receptive to advertising

% of esports followers in 15 markets who say the following describes them (sorted by over-index)

16

*esports followers are defined as gamers who say they watch/follow one of the 22 esports leagues we track & who say they're extremely/very interested in esports

GWI Gaming Q4 2020 · 7,506 esports followers in 15 markets aged 16-64

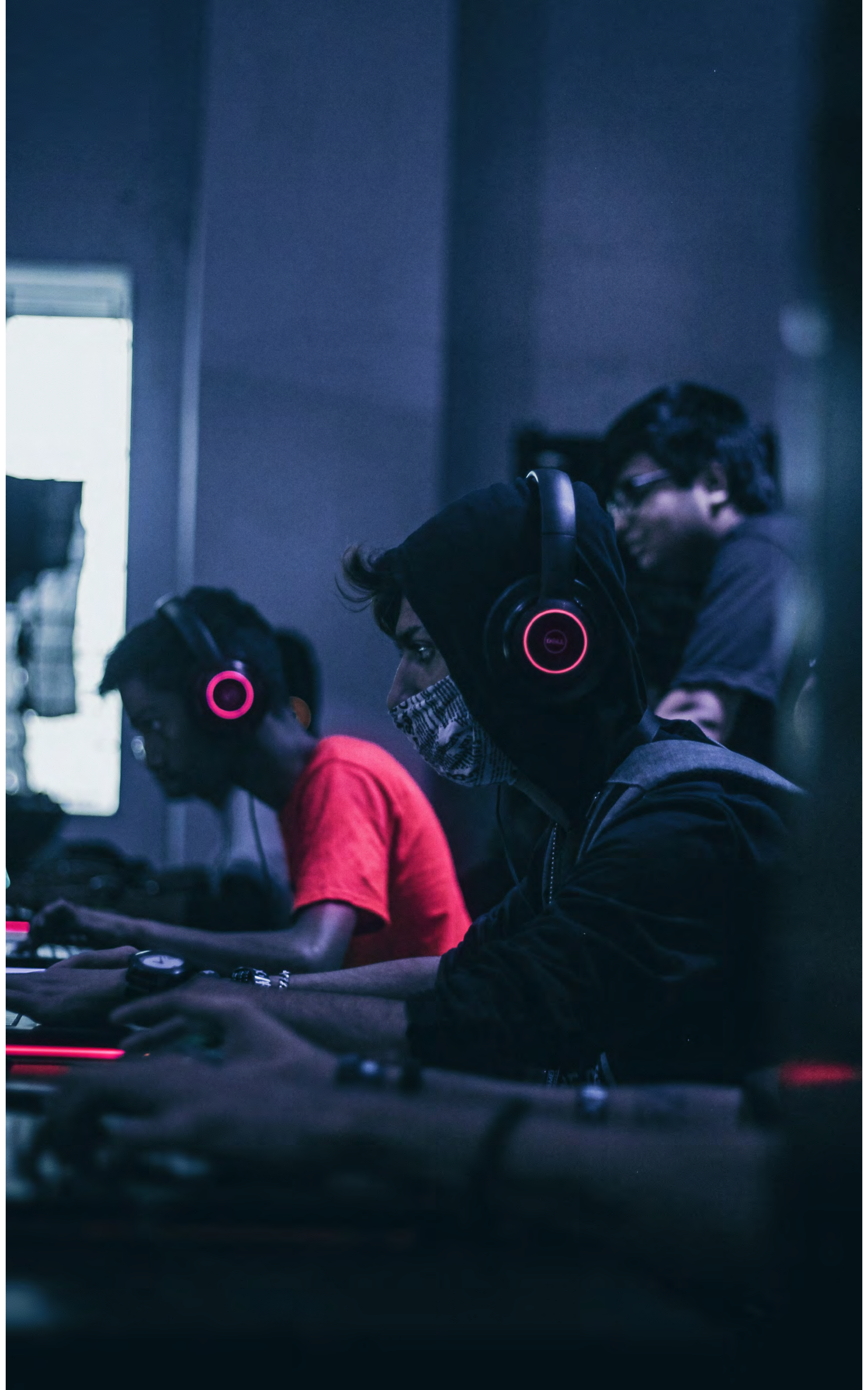
Esports leagues around the world

From our 22 tracked esports leagues, we can see the FIFA Interactive World Cup nabs the most interest from esports followers in many countries. This is likely down to the popularity of *FIFA* among gamers generally, with all PlayStation users being eligible and encouraged to take part. In 2019, the final was broadcast live on Fox Sports and many **professional football clubs**, like PSG, Manchester City, West Ham United, and Sporting Lisbon signed up online gamers to represent their club in the online world. This not only highlights the vast commercial opportunities in esports, but the increasingly blurred relationship between sports and gaming.

Call of Duty League also features in the top 3 titles in eleven of the markets we track, which isn't surprising given the success of *Black Ops Cold War* in 2020, which has also managed to reach new audiences through *Call of Duty: Mobile*. Like most esports leagues around the world, the league was forced to shift to an online format last year, but that didn't hinder engagement. Last year's final was the **most-watched** *Call of Duty* match ever, amassing 330,000 viewers and leaving the winner with $4.6 million and a **throne**. Soccer star Paul Pogba **joined** the Verdansk FC esports team last year to play *Call of Duty*, helping to bring esports to an ever bigger audience.

League of Legends (LoL) Championship Series, Fortnite World Cup, and PUBG Global Championship are also prominent titles. *League of Legends*, which dominates esports in South Korea and China, managed to weather the storm of the pandemic far better than others – the LoL Worlds still took place in China with spectators and there wasn't a major drop-off in prize money either. Engagement with esports leagues might differ based on location, but they all bring a legion of dedicated fans and plenty of opportunities for the right brands to play in this space. Our data allows you to understand each subset of esports follower, which differs based on titles and location, to help reach your target audience more effectively.

Want our latest market and regional insights? Our **market snapshots** offer an easy way to discover the digital consumer in your area.



The folks organizing and competing in both the *Call of Duty* League and *Overwatch* League did an amazing job pivoting to challenging conditions last year, and fans did just as good of a job following their favorite teams too.

Research that *Activision Blizzard* conducted last year found that fans of esports leagues have a different stated and observed reaction to ads and sponsorships integrated into these broadcasts, when compared to traditional sports and other entertainment content. There's a mutual respect between esports fans, players, sponsors, and organizers, all wanting their beloved sports and leagues to grow and prosper. It's because of this that we see increased level of campaign impact and favorability for brands entering the esports space, looking to turn passionate fans into engaged customers.

Jan Bojko, Head of Market Research, Activision Blizzard Media

Esports leagues around the world

% of esports followers who watch, follow, or have an interest in the following esports leagues

Australia

FIFA Interactive World Cup	20
International DOTA 2	19
Call of Duty League	18

Brazil

FIFA Interactive World Cup	35
League of Legends Series	23
Call of Duty League	19

Canada

Call of Duty League	26
FIFA Interactive World Cup	22
Fornite World Cup	20

France

FIFA Interactive World Cup	22
Call of Duty League	22
Fornite World Cup	20

Germany

FIFA Interactive World Cup	28
Call of Duty League	24
Fornite World Cup	20

India

PUBG Global Championship	41
FIFA Interactive World Cup	35
Call of Duty League	32

Indonesia

PUBG Global Championship	43
FIFA Interactive World Cup	31
ePremier League	21

Italy

FIFA Interactive World Cup	35
eFormula one	29
Call of Duty League	17

Japan

ePremier League	29
Fornite World Cup	29
FIFA Interactive World Cup	24

Mexico

FIFA Interactive World Cup	40
Call of Duty League	25
eFormula one	25

Philippines

Call of Duty League	38
International DOTA 2	35
League of Legends Series	34

Spain

eLaLiga	29
eFormula one	29
FIFA Interactive World Cup	28

Thailand

FIFA Interactive World Cup	26
PUBG Global Championship	23
ePremier League	19

UK

FIFA Interactive World Cup	31
Call of Duty League	25
Fornite World Cup	17

USA

Call of Duty League	32
Fornite World Cup	23
FIFA Interactive World Cup	22

GWI Gaming Q4 2020

7,506 esports followers in 15 markets aged 16-64

Esports remains anchored online – but is amplified by TV viewership

Twitch has long been at the forefront of esports viewing, and has continued to invest heavily over the past year. In April 2020, it launched an **esports directory**, which put all the professional esports content on Twitch in one central place. In the same month, Twitch also entered into a **three-year broadcast partnership** with tournament organizers ESL and DreamHack, with the major English esports events being streamed exclusively on the platform. Last year, YouTube made its biggest leap yet in taking on Twitch's dominance, **signing exclusive deals** with Call of Duty League, Overwatch League, and competitive Hearthstone to stream matches on its platform.

What sets Twitch apart, though, is its strong community offering, which we know is something esports followers crave. Features like Twitch Chat and bonus gifts like exclusive skins make the experience immersive and engaging. It's cultivated a unique culture among different esports followers, and its ability to connect people from all around the world based on shared interests is unmatched – and something which traditional TV also lacks in comparison.

Having said that, 36% of esports followers also say they watch esports via broadcast TV, and while this trails behind other channels, it's still a significant portion of followers. So while online streaming sites might dominate esports engagement overall, traditional TV can complement this and drive viewership even further – especially among older esports followers, who are more inclined than Gen Z followers to watch it on TV. ESPN even created a branded **ESPN Esports Day** which included 12 hours of esports in April last year.

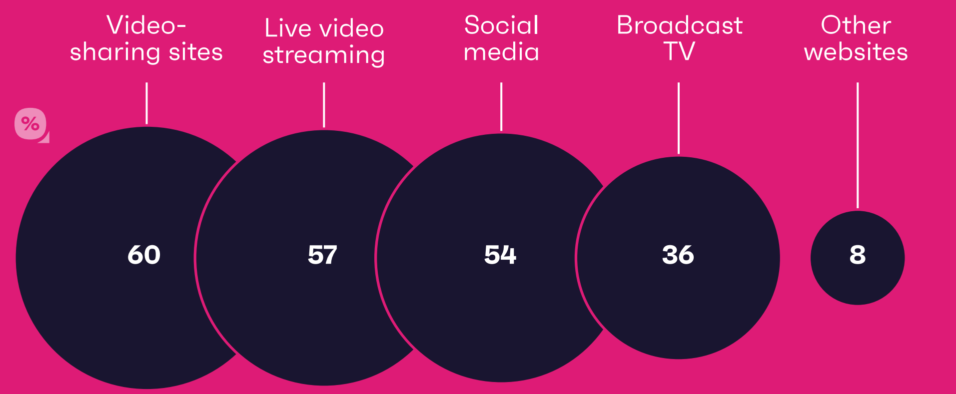
Mobile is the top device to watch esports at 69%, followed closely by laptops/PCs at 66%. The future of esports growth, like gaming, will be rooted in mobile. Mobile helps to cut barriers to entry and allows more gamers to pour in. China already has a thriving mobile esports scene, for example, and for emerging esports markets like India this will also be the case.

44% of Gen X and 46% of boomers who are esports followers watch it on TV

Esports remains firmly anchored online...

18

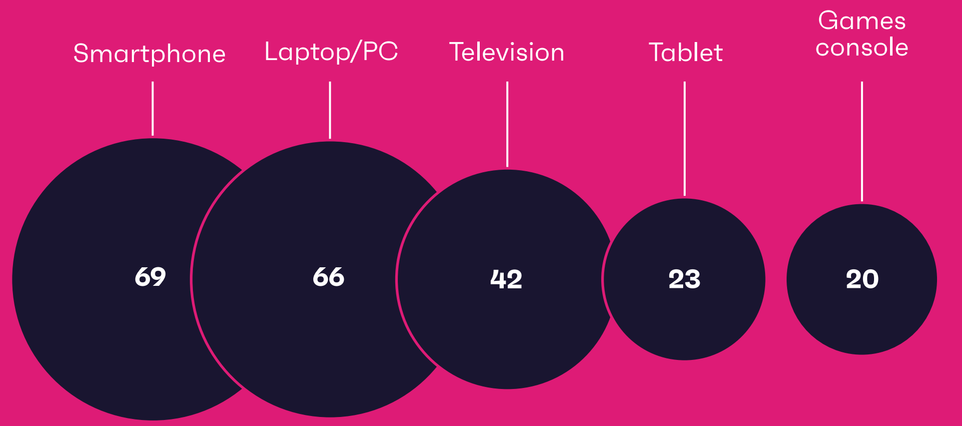
% of esports followers who watch esports via the following



...and mobile is a gateway for many

19

% of esports followers who use the following devices to watch esports



GWI Gaming Q4 2020

7,506 esports followers in 15 markets aged 16-64

Esports followers in India spend just under 4 hours per day on mobile

Trend in action

Mobile gaming put India on the esports map

The potential for esports in India is enormous. The country's gaming industry is valued at **$930m** and is among the top 5 mobile gaming markets in the world. As of 2020, there are over **687 million** internet users. India's growing younger user base presents a big opportunity. And in our data, 84% of gamers in India say they're interested in esports.

According to SensorTower, India rose to the **number one spot** in mobile game downloads worldwide in the first nine months of last year; downloading a whopping 7.3 billion games, nearly 17% of all worldwide downloads. Access to affordable mobiles, advancement in digital infrastructure, and the rise of mobile games all contributed to this growing appetite for gaming content.

The immensely popular free-to-play *PUBG Mobile*, and *Clash of Clans*, helped to put esports on the map in India. Following PUBG's exit due to a clampdown on Chinese-associated apps, it's left a gaming-shaped hole in many Indian gamers' lives – but this won't be for long. Global gaming firms, like Activision, are **lining up to invest** in India's esports ecosystem. Anyone with an eye on esports, will have its eye on the massive commercial opportunity in India. China might still lead the esports pack for now, but the gap is starting to close.

Over half of esports fans follow esports players on social media

The commercial opportunity in esports

Engagement and interest in esports is going from strength to strength, opening up exciting opportunities for investors, brands, and sponsors – of all kinds.

Last year, BMW **partnered** with 5 major esports organizations, while Marvel Entertainment dipped its toes with its **first** esports partnership. In February 2021 alone, Dunkin' **partnered** up with Twitch Rivals North America; Invisalign **sponsored** San Francisco-based Golden Guardians; and TikTok **entered** a year-long partnership with FIGHT esports. The list goes on.

Collaborations often involve a range of original content creation, interactive experiences, and other fan activations – and esports followers welcome this level of engagement. Close to half think brands are usually well-suited to the esports events sponsor, while around 2 in 5 say it's OK for brands not related to esports to sponsor teams or events. Around half of esports followers also say they notice the brands worn by teams/players during events, and close to 2 in 5 say they try to support brands that sponsor their favorite teams.

All good news, but around 1 in 4 also say that there's too much advertising in esports, and they're also 12% more likely than the average gamer to have used an ad-blocker in the last month (55% have).

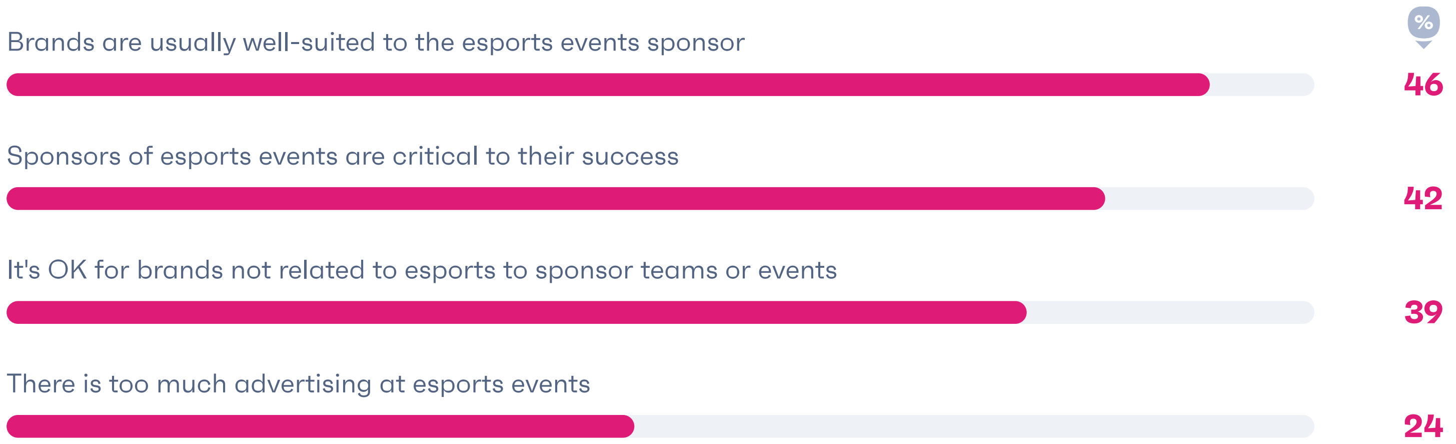
It's been said before and it'll be said again – relevancy is absolutely key to achieving meaningful connections. Nobody wants to be bombarded with irrelevant ads when they're just trying to enjoy their favorite content. It's that simple.

One effective channel could be using esports teams and players as influencers. Over half of fans say they follow esports players on social media, and they're more likely than the average gamer to find out about new brands/products through endorsements by well-known individuals.

20

Sponsorship is largely welcomed, but some are ad-weary

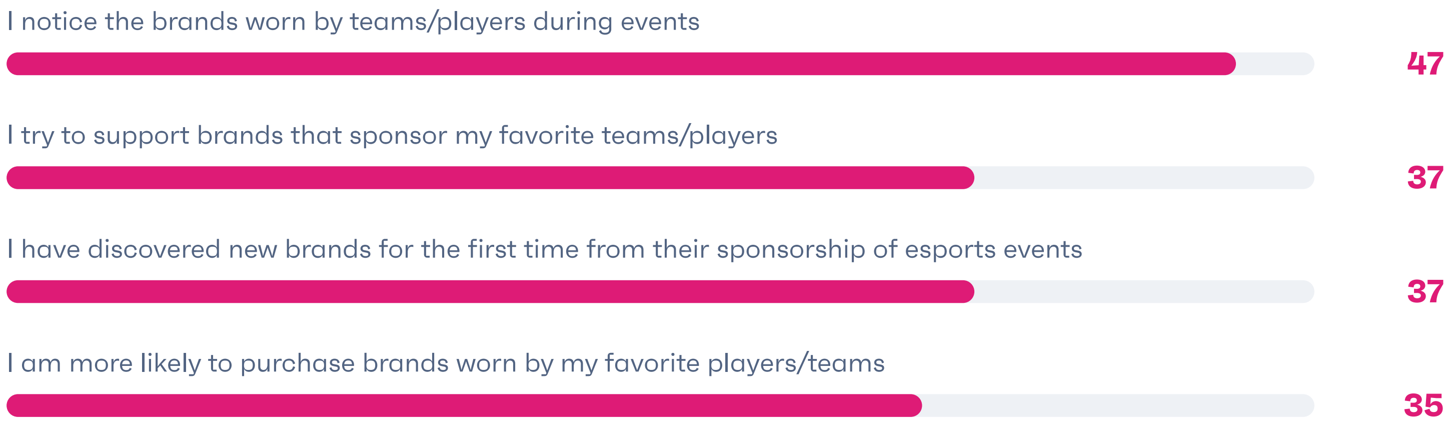
% of esports followers who feel the following ways about sponsorship of esports



21

For brands, the impact of sponsorship investments will pay off

% of esports followers who say the following statements apply to them



GWI Gaming Q4 2020 7,506 esports followers in 15 markets aged 16-64

Status, involvement, and exclusivity are key drivers of advocacy... 22

% of esports followers who say the following would motivate them to promote their favorite brand online (sorted by over-index)

	IDX	%
When something enhances my online reputation/status	1.37	21
Access to exclusive content or services	1.31	28
Having insider knowledge about the brand or its products	1.24	29
The feeling of taking part/being involved	1.23	28
When something is relevant to my friends' interests	1.17	25

...these sentiments are also reflected in what they want brands to do 23

% of esports followers who say they wants brand to do the following things (sorted by over-index)

	IDX	%
Run customer communities/forums	1.33	26
Help you improve your image/reputation	1.26	28
Support charities	1.13	37
Offer customized/personalized products	1.11	35
Help you improve your knowledge/skills	1.05	42

GWI Gaming Q4 2020 7,506 esports followers in 15 markets aged 16-64

From fans to champions: building brand advocacy

The icing on the cake is turning fans into champions – loud and loyal voices of your brand. It's by no means an easy feat, especially in a quickly evolving space, but knowing what they value is a step in the right direction.

Esports followers highly value status, involvement, and exclusivity. They want to feel included, like they're "in-the-know". Again, it's their undeniable fondness of being part of a community that underpins these attitudes – which helps to explain why they're 33% more likely than the average gamer to want brands to run customer communities and forums.

They're also far more likely than the average gamer to say they'd promote their favorite brand when something enhances their online status, if they get access to exclusive content or services, or if they have insider knowledge about the brand or products.

Brands and esports organizations who can create an environment where followers feel involved, heard, and like they're part of something truly special will have a much better chance of getting the champions they're after – and keeping them too.

37% of esports followers want brands to be exclusive (28% more likely than the average gamer)

Appendix

1 This chart is drawn from multiple questions across our Core and Gaming datasets.

2 Which of these gaming genres have you played in the last 12 months?

3 Which of these gaming genres have you played in the last 12 months?

4 Which of these devices do you use for gaming?

5 What are your main reasons for gaming? • What typically makes you frustrated about a game?

6 Which of these consoles do you have?

7 Which of these devices do you use for gaming? | Which would you be interested in purchasing?

8 Which of these gaming PC or laptop brands do you have?

9 Do you use any of these additional services? • Which services you are considering purchasing in the next 12 months?

10 Thinking about gaming, which of these things have you purchased in the last year?

11 Which of these additional devices/accessories are you considering purchasing/replacing in the next year?

12 Thinking about gaming, which of these things do you do?

13 Where do you get information and content on gaming?

14 Where do you get information and content on gaming? (Social Media) • Which social media platforms do you use for information and content?

15 How old are you? • Which of these best describe your gender? • What is your yearly household income before tax or any other deductions?

16 Which of the following do you feel describes you?

17 Which of these esports leagues/events do you watch, follow, or have an interest in?

18 How do you watch esports?

19 Which devices do you use to watch esports?

20 How do you feel about sponsorship of esports?

21 Which of these statements about sponsorship apply to you?

22 What would most motivate you to promote your favorite brand online?

23 Which of these things do you want brands to do?

Notes on methodology

Introduction

Figures in this report are primarily drawn from **GWI Gaming's online research among internet users, who are gamers, aged 16-64**. We also use our GWI Core dataset, which is fielded across 47 countries, and interviews over 688,000 respondents per year.

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

In this research, GWI interviewed 19,488 gamers aged 16-64 across 15 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 GWI 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.

Sample size by market

This report draws insights from GWI Gaming's Q4 2020 wave of research across 15 countries, with a global sample of 19,488 respondents.

	All gamers
Australia	770
Brazil	1,011
Canada	1,102
France	985
Germany	1,087
India	1,787
Indonesia	1,482
Italy	1,450
Japan	1,105
Mexico	957
Philippines	1,002
Spain	1,566
Thailand	1,033
UK	1,377
USA	2,774

Internet penetration rates: GWI versus ITU figures

As GWI'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.

Internet penetration rates across GWI's markets

GWI'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.

Internet Penetration Rates (GWI's Forecasts for 2020 based on 2018 ITU data)

Table here refers to the total population in each market

	%
Australia	89
Brazil	75
Canada	94
France	86
Germany	92
India	45
Indonesia	42
Italy	77
Japan	93
Mexico	71
Philippines	67
Spain	90
Thailand	59
UK	96
USA	90

This table provides GWI 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 GWI conducts online research in.

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