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How different generations engage with video games today

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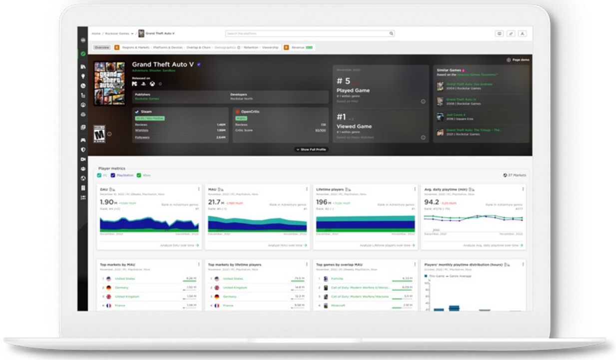

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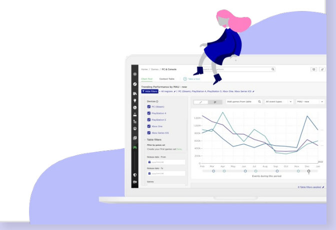

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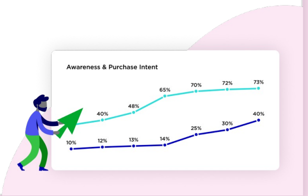

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Welcome to the second edition of our report on the greatest gaming generations!

Gaming captivates newer and more diverse audiences with each passing generation. **Consumers increasingly engage with video games and platforms beyond playing**, especially as developers and publishers adopt new business models and technologies to delight younger generations of gamers.

What's more, **consumers across every generation are weaving games more closely into their lives.** Games are, in parallel, becoming a more significant element of the marketing mix for companies in the industry and far beyond.

Understanding why gamers across generational divides play, view, create, and spend on games is and will continue to be essential in the battle for consumer time and money. Learning more about your target audiences can illuminate what may resonate with them now, as they get older, and as they introduce gaming to future generations.

We hope you enjoy this free report. Please get in touch to learn more about subscribing to the Global Gamer Study, the data engine behind this report, which covers 36 gamer markets worldwide. Happy reading!

Jutta Jakob

Head of Consumer Insights

Orla Meehan

Research Manager

Key insights

1. All generations engage with gaming

All generations engage with gaming, and with every new generation, gaming expands its reach. Even 40% of Baby Boomers engage with games, emphasizing its enduring appeal.

Today, game enthusiasts of all ages engage in many ways, including playing, viewing, socializing, and creating. Younger generations are more likely to engage across every one of these dimensions.

Gaming also serves as a social outlet for many, while an increasing number of players identify as gamers.

94%

of Gen Alpha are game enthusiasts[1]

2. Generational playing behaviors and preferences differ significantly

While mobile gaming maintains its popularity across all generations, younger generations are significantly more inclined to play on PC and console platforms. Multi-platform gaming is significantly more common among younger generations, a trend expected to gain even more momentum in the future.

Younger cohorts showcase diverse gaming motivations spanning various genres, with a strong focus on social interaction, immersion, and achievement.

In contrast, older generations tend to gravitate toward more casual games for leisure.

Approx. **50%**

of Gen Alpha, Gen Z, and Millennials play on more than one platform

3. All generations spend money on video games

Players across every generation convert to payers at a high rate. Unsurprisingly, mobile has the highest share of paying players.

If we talk about big spenders[2], Gen Z and Millennials are the most likely to exhibit this behavior, with console gaming unsurprisingly having the highest share of big spenders.

Moreover, in-game currencies are the top item purchased across generations (within games). Extra or exclusive content tends to be the most potent motivator for spending, from Gen Alpha to Baby Boomers.

61%

of Millennial players spend money on video games

4. Viewing is key to engagement for younger generations

Every generation plays and views video game content, but younger game enthusiasts are more likely to do both. Younger generations are, in general, more likely to view gaming video content and esports compared to older enthusiasts.

Gameplay video content has the broadest appeal among viewers, and comedic gaming videos and compilations are trendy among younger viewers.

Overall, gaming video content offers an attractive avenue for developers and publishers to connect with their players, especially younger ones.

70%

of Gen Alpha are engaged with both playing and viewing

5. Game enthusiasts[1] across generations are embracing brands positively

Video games and gaming platforms are an increasingly important marketing tool for brands.

Many younger players discover new brands while gaming, and game enthusiasts across generations have more positive attitudes toward brands in general.

Games are a dynamic and interactive medium well-suited for brands looking to deepen their connection with their target audience. This is especially true as more people seek connection as gamers outside of main game universes.

Over **50%** of Gen Alpha, Gen Z and Millennials players discover new brands while gaming

[1] Game Enthusiasts are consumers who engage with gaming through playing, viewing, owning, and/or social behavior
[2] Big spenders: £/€/$25 or more a month

Newzoo's Global Gamer Study 2023

Definitions and methodology

Methodology

Survey methodology: Computer-Assisted Web Interviewing (CAWI)

Fieldwork: February 2023 – May 2023

Target group: Representative sample of the online population aged 10-65/10-50 (regional coverage and age scope differ by market).

Sample size: 74,295 respondents across 36 countries/markets. Per country/market, approx. 2,000 respondents, 3,000 for the United States and China, and 1,500 for Egypt, Saudi Arabia, and the United Arabic Emirates.

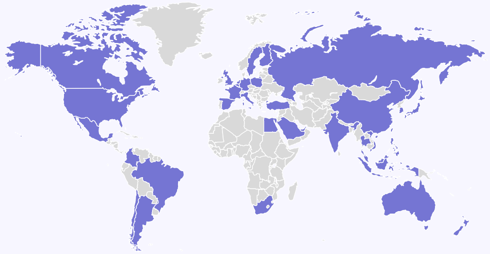
Geographic scope

NAM: United States, Canada

EMEA: United Kingdom, Germany, France, Spain, Italy, Russia, Poland, Netherlands, Belgium, Sweden, Finland, Turkey, Egypt, Saudi Arabia, United Arab Emirates, South Africa

LATAM: Mexico, Brazil, Argentina, Chile, Colombia

APAC: Australia, New Zealand, China, Japan, South Korea, Thailand, Taiwan, Indonesia, Vietnam, Malaysia, Philippines, Singapore, India.



For more details: Global Gamer Study 2023 methodology

Definitions

Generations:
→ Gen Alpha (born 2010 or later / 10-13 y.o.)*
→ Gen Z (born 1995-2009 / 14-28 y.o.)
→ Millennials (born 1981-1994/29-42 y.o.)
→ Gen X (born 1965-1980 / 43-58 y.o.)
→ Baby Boomers (born 1946-1964 / 59-65 y.o.)*

*Please note we only cover ages 10-65 in our survey.

Total Online Population: Population that has access to a stable/active internet connection.

Game Enthusiasts: Consumers who engage with gaming through playing, viewing, owning, and/or social behavior.

Players: Those who have played video games on a PC, console, or mobile in the past 6 months.

Payers: Players who the past six months, on average, spent money on a monthly basis on games on a PC, console, or mobile device. Spending money includes gifts, downloadable content, subscriptions, and other micro-transactions.

→ **Minor spenders:** up to £/€/$5 a month
→ **Average spenders:** between £/€/$5 – £/€/$25 a month
→ **Big spenders:** £/€/$25 or more a month

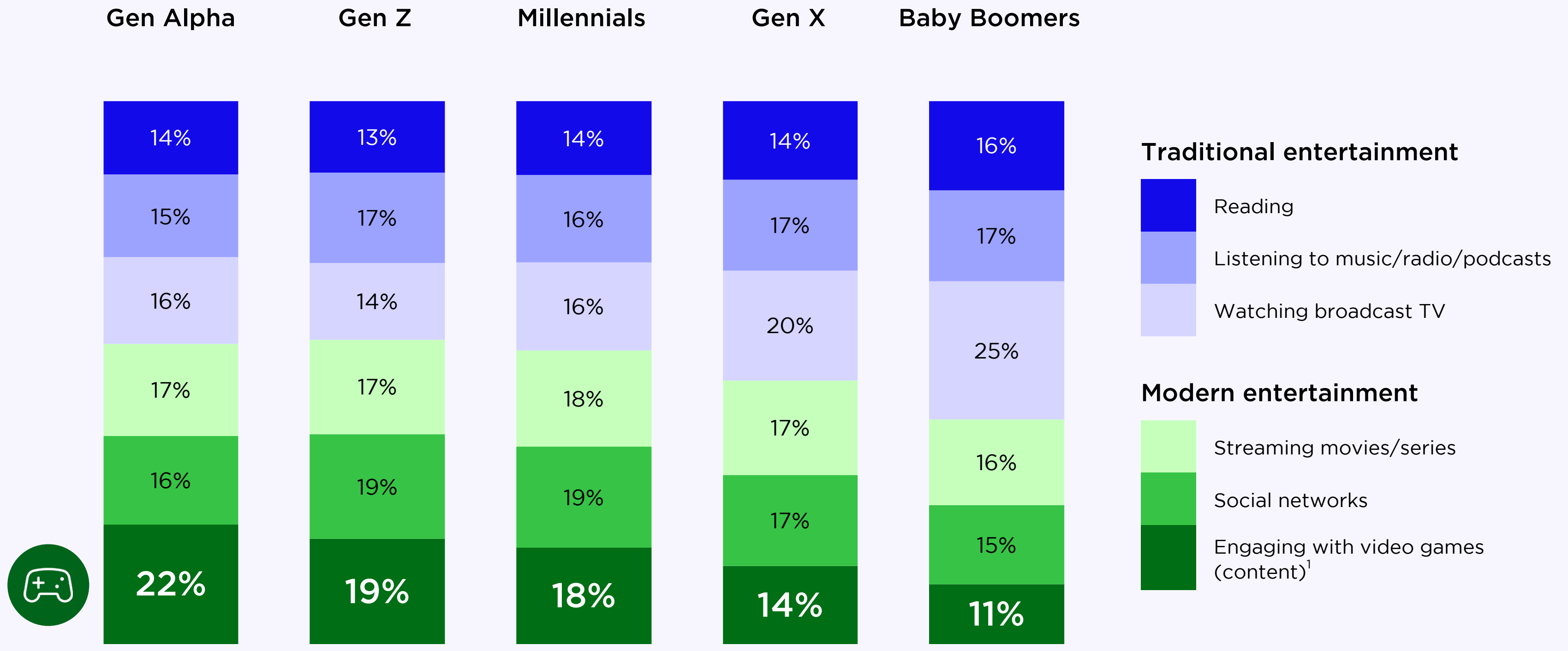
Viewers: Those who watched live-streamed or pre-recorded gaming video content in the past 12 months (incl. esports). (=Gaming video content viewers).

How different generations engage with games

With every new generation, gaming expands its reach

Video games are the #1 source of entertainment for Generation Alpha

% Leisure Time Spent per Week per Entertainment Platform (Outside of Work)
Base: Total online population



With each passing generation, gaming's popularity continues to surge, captivating an increasingly diverse audience. Younger generations especially allocate more or as much time to gaming than any other form of entertainment.

This shift highlights the enduring appeal of gaming as it becomes an integral part of our lives. It connects people across different ages and backgrounds and fosters connection and a sense of shared excitement.

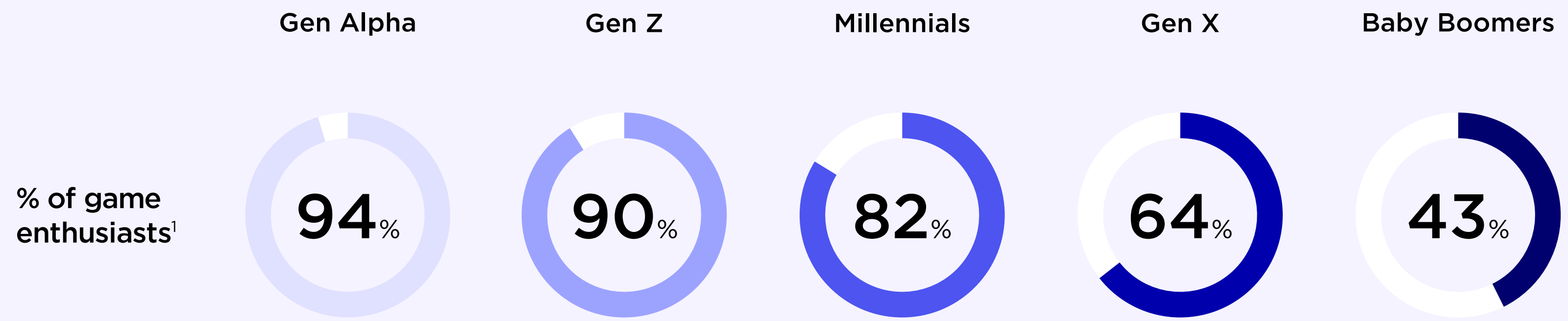
[1]Engaging with video games / gaming content = Playing video games, viewing gaming video content, creating gaming content or socializing through/visiting gaming communities

Source: Newzoo Global Gamer Study 2023 (Weighted average across 36 markets)
Q. Leisure time spent per week on various activities
Base: Generation Alpha (n=5,182), Gen Z (n=25,494), Millennials (n=22,942), Gen X (n=15,868), Baby Boomers (n=4,809)

All generations engage with gaming

Nine out of 10 Gen Alpha and Gen Z have engaged with gaming in one form or another in the past six months

% Game Enthusiasts
Base: Total online population



1 Game Enthusiasts are consumers who engage with gaming through playing, viewing, owning, and/or social behavior

Although younger generations are more engaged than their older counterparts, video games transcend generational boundaries to hold a universal appeal.

Even among Baby Boomers, over 40% remain engaged with gaming, underscoring interactive digital entertainment's lasting allure.

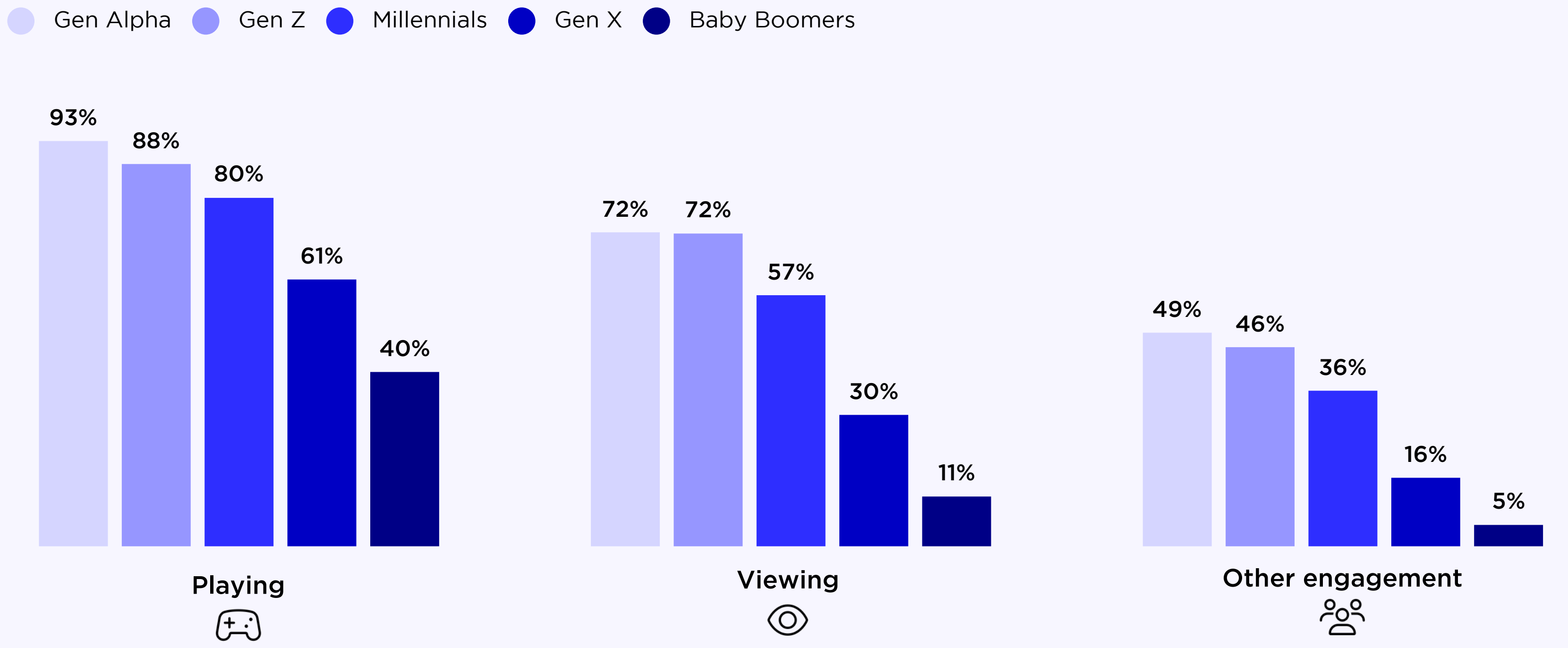
As younger generations grow up with gaming and new technologies pave the way for different, more accessible sorts of engagement (such as cross-platform play and higher-quality mobile games), we can anticipate even higher participation rates among older generations in the future.

Source: Newzoo Global Gamer Study 2023 (Global weighted average across 36 markets)
Q. Game Enthusiasts
Base: Generation Alpha (n=5,182), Gen Z (n=25,494), Millennials (n=22,942), Gen X (n=15,868), Baby Boomers (n=4,809)

Game engagement transcends play to other forms of interaction

Younger generations are more likely to engage with games and game platforms across various dimensions, including playing, viewing, and other forms of interaction

Gaming engagement
Base: Total online population



While playing remains the most common way people engage with games across generations, other forms of engagement are becoming more prominent.

As players from younger generations enter the fold, more players view video game content, join and interact with video game communities, socialize within game environments, listen to industry and fan podcasts, and go even further to weave games into their lives.

So far, viewing is the most popular engagement type aside from playing. This highlights the current gaming video boom.

[1] Game Enthusiasts are consumers who engage with gaming through playing, viewing, owning, and/or social behavior
[2] Other gaming engagement includes those that claim to have "often" followed video gaming channels or esports broadcasters, socialized through/visited online gaming communities, discussed video games with family and friends, listened to gaming podcasts, and/or attended large in-person gaming conventions in the past 12 months

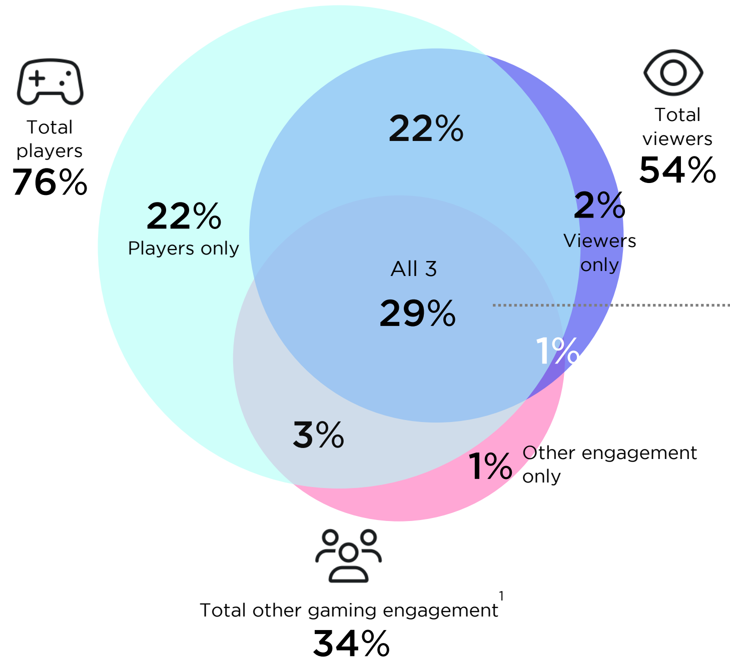
Source: Newzoo Global Gamer Study 2023 (Global weighted average across 36 markets)
Q. Total players (past 6 months), Gaming video content viewers (past 12 months), Those who engage with gaming beyond playing/viewing in the past 12 months (% often)
Base: Generation Alpha (n=5,182), Gen Z (n=25,494), Millennials (n=22,942), Gen X (n=15,868), Baby Boomers (n=4,809)

Gen Alpha are the most likely to engage across dimensions

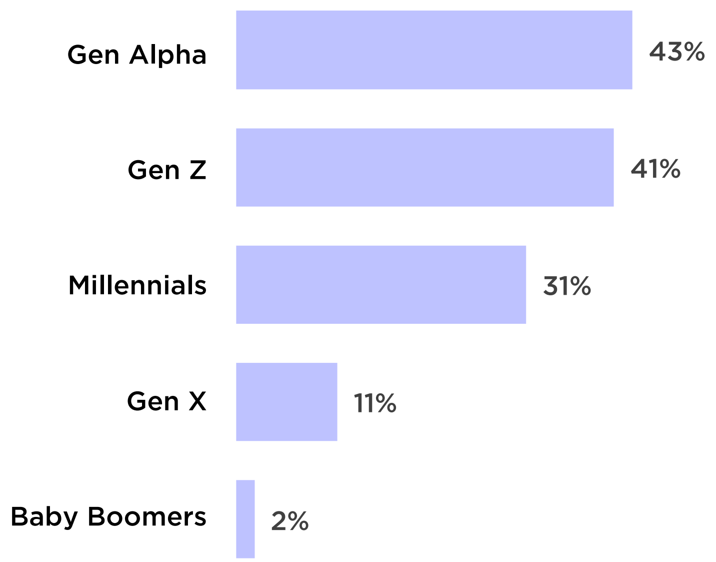
Multi-dimensional engagement is notably more likely with younger generations

Gaming engagement overlap
Base: Total online population

Total population
79% engage with gaming[2]



Engages with all 3 dimensions



43% of Gen Alpha engages with gaming via playing, viewing, and multiple other forms, including joining gaming communities, following streamers, and creating content.

Gaming platforms (or virtual worlds) like Minecraft, Roblox, and Fortnite have gained significant popularity among younger generations seeking immersive social experiences.

Gaming has become part of younger generations' daily social life and identity. In many ways, it's become a way of life for many enthusiasts instead of a pastime.

This trend toward multi-dimensional engagement is especially interesting for brands outside of games looking to capture audiences in new ways.

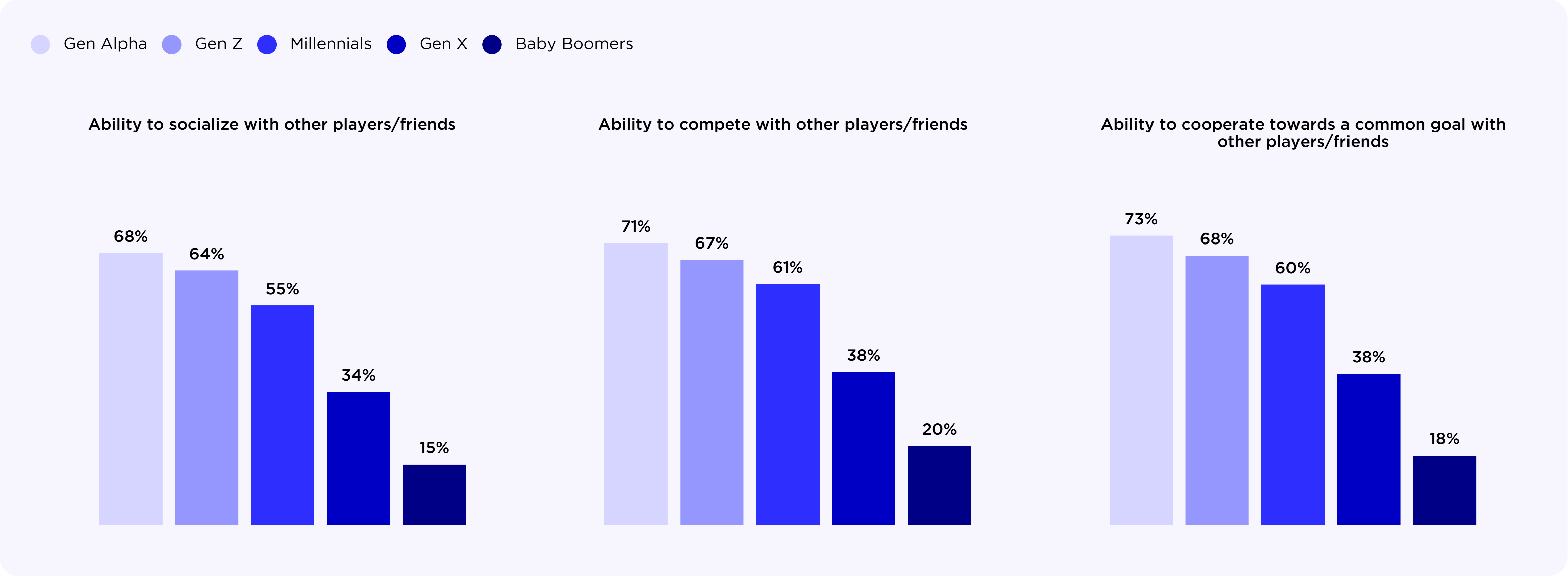
[1]Other gaming engagement includes those that claim to have "often" followed video gaming channels or esports broadcasters, socialized through/visited online gaming communities, discussed video games with family and friends, listened to gaming podcasts, and/or attended large in-person gaming conventions in the past 12 months
[2]Please note the other 21% that are not game enthusiasts are not shown here.

Source: Newzoo Global Gamer Study 2023 (Global weighted average across 36 markets)
Q. Total players (past 6 months), Gaming video content viewers (past 12 months), Those who engage with gaming beyond playing/viewing in the past 12 months (% often)
Base: Total sample (n= 74,295)

Gaming has become a key social channel for younger generations

Cooperative and social features of games are significantly more important for younger players

Importance of social features in games | Rated 5, 6, or 7 out of 7 in terms of importance
Base: Total players

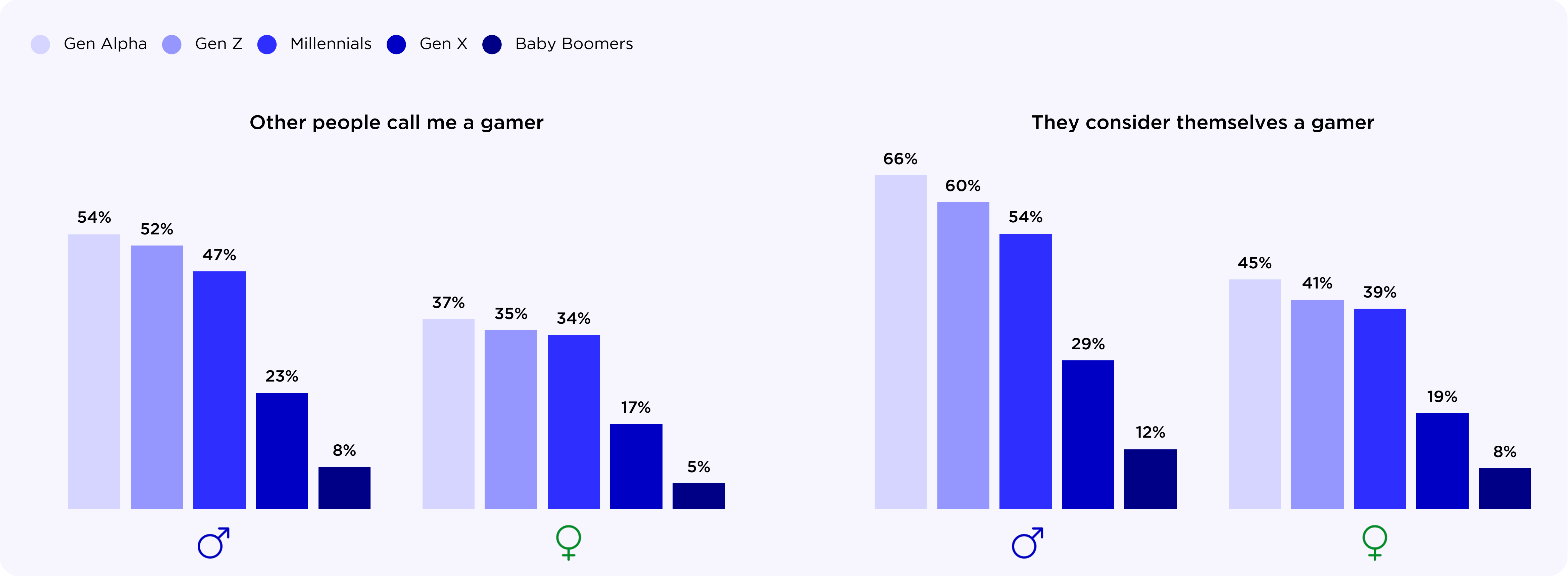


Source: Newzoo Global Gamer Study 2023 (Global weighted average across 36 markets)
Q. Importance of social features in games (statements)
Base: Gen Alpha players (n=4,867), Gen Z players (n=22,574), Millennial players (n=18,690), Gen X players (n=9,989), Baby Boomer players (n=1,920)

Gaming is even a part of younger generations' identities

Younger male players are a lot more likely to consider themselves gamers; a higher share of male and female players consider themselves gamers, suggesting a desire to be associated with gaming

Gamer identity statements by gender[1] | Rated 5, 6, or 7 out of 7 in terms of importance
Base: Total players*



[1]Excluding other/non-binary

Source: Newzoo Global Gamer Study 2023 (Global weighted average across 36 markets), Q. Gamer identity (statements)
Base: Male: Gen Alpha players (n=2,551), Gen Z players (n=12,257), Millennial players (n=10,309), Gen X players (n=5,280), Baby Boomer players (n=984)
Feale: Gen Alpha players (n=2,304), Gen Z players (n=10,100), Millennial players (n=8,326), Gen X players (n=4,701), Baby Boomer players (n=933)

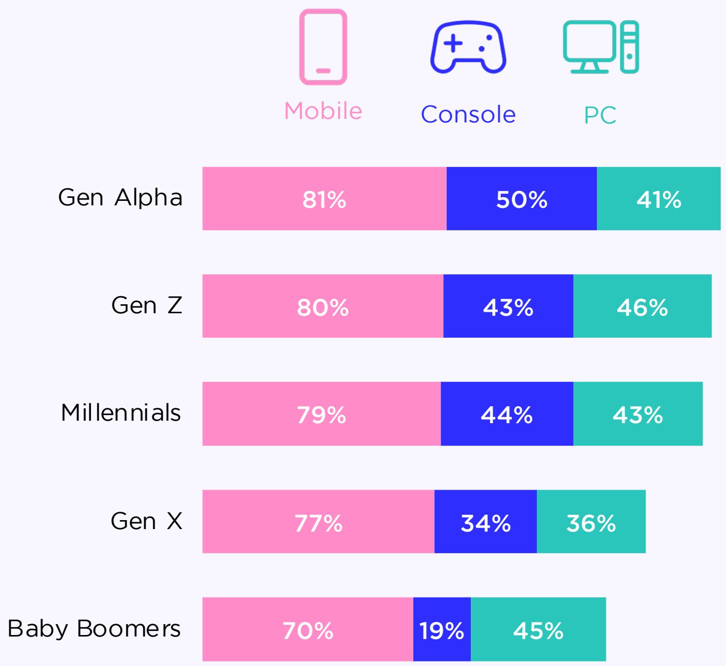
How different generations play games

Mobile is the top platform played across all generations

Younger generations are embracing multi-platform play

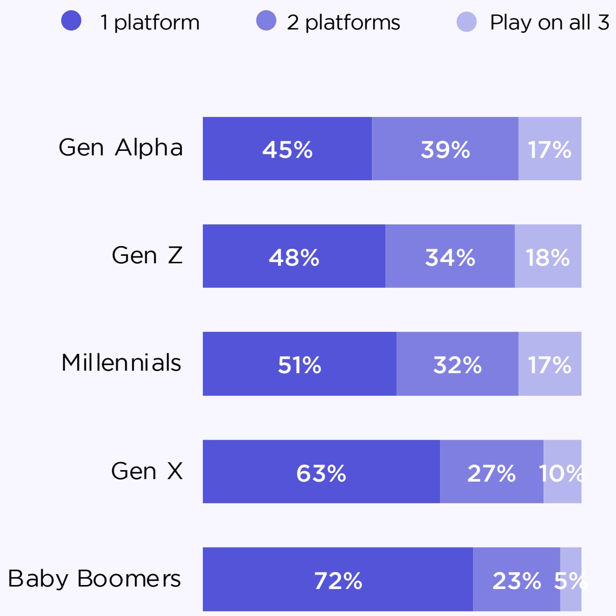
Share of players by platform

Base: Total players



Number of platforms played on

Base: Total players



Across every generation, mobile is the most common platform for playing games. Mobile gaming's low barriers to entry make it the most accessible platform.

Meanwhile, console and PC gaming are significantly popular among younger generations, while console gaming is the least popular among Baby Boomers.

Platform-exclusive players continue to have a considerable hold across generations, especially among older players. Despite this, half of Gen Alpha, Gen Z, and Millennials play on more than one gaming platform.

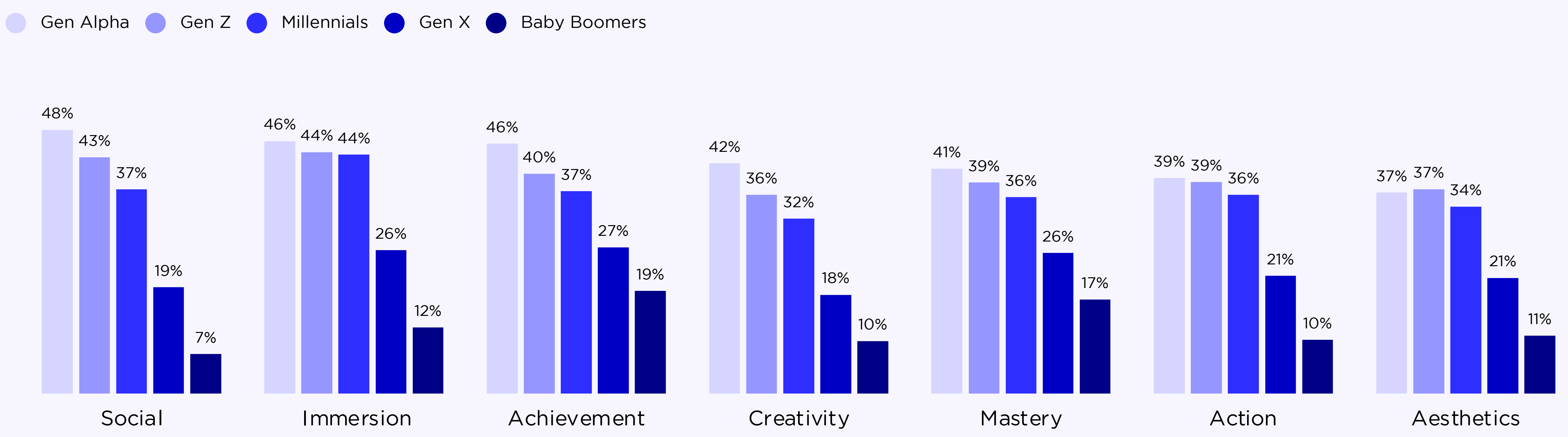
Gen Alpha has the highest share of multi-platform players. This may be due in part to these players having more leisure time and more opportunities to play. Also, younger generations tend to be more acclimated to hopping between different devices. Cross-platform play options in newer games and the continuing migration of AAA PC and console games to mobile also impact this generation's share of multi-platform players.

Source: Newzoo Global Gamer Study 2023 (Global weighted average across 36 markets)
Q. Players (past 6 months), Platform player overlap
Base: Gen Alpha players (n=4,867), Gen Z players (n=22,574), Millennial players (n=18,690), Gen X players (n=9,989), Baby Boomer players (n=1,920)

Video games meet different needs across generations

The social, immersive, and achievement sides of games appeal greatly to younger players

Player motivations[1] | % Top Box
Base: Total players



Motivations to play games vary significantly across generations, with younger players having a broader range of reasons than older generations. For instance, Baby Boomers are more motivated by achievement and mastery than social aspects. On the other hand, Gen Alpha players are primarily driven by social interaction, immersion, and achievement. Immersion also holds significant importance as a motivator for Gen Z and Millennials.

[1] Respondents are given a score per category based on answers to player motivation questions. Their scores are then put into one of three buckets (Low, Mid, High) when compared to the global average. The shares included reflect the highest bucket. Each category is made up of statements related to that category.

Source: Newzoo Global Gamer Study 2023 (Global weighted average across 36 markets)
Q. Level of play motivations
Base: Gen Alpha players (n=4,867), Gen Z players (n=22,574), Millennial players (n=18,690), Gen X players (n=9,989), Baby Boomer players (n=1,920)

Adventure is the genre with the widest appeal across generations

Gen Alpha plays the widest number of different genres, emphasizing their diverse engagement styles

Top 3 genres played on any device (past 6 months) | Top 3 of 24
Base: Total Players

	Gen Alpha	Gen Z	Millennials	Gen X	Baby Boomers
#1	Adventure 42%	Adventure 43%	Adventure 41%	Puzzle 36%	Puzzle 41%
#2	Racing 41%	Battle Royale 42%	Racing 33%	Match 31%	Match 28%
#3	Battle Royale 40%	Arcade 37%	Battle Royale 33%	Adventure 27%	Tabletop 27%
Average no. of genres played:	6.0	5.7	5.5	4.0	2.8

On average, younger generations play a wider number of genres than older players do. Genre preferences also differ significantly from one generation to another. Older gamers tend to play more Puzzle and Match games, while Gen Alpha, Gen Z, and Millennials all lean towards Adventure titles most frequently. The popularity of multiplayer genres like Battle Royale and Racing among younger generations further underscores the importance of socializing in games and gaming culture. One notable trend we observe is that older generations are more interested in casual genres, suggesting that these players are more selective, possibly due to other commitments and lifestyle preferences.

See the top genres played by each generation in 36 different countries.

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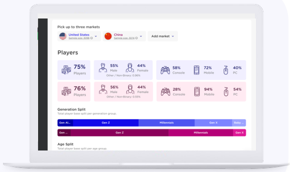


Source: Newzoo Global Gamer Study 2023 (Global weighted average across 36 markets)
Q. Genres played on any device (past 6 months)
Base: Gen Alpha players (n=4,867), Gen Z players (n=22,574), Millennial players (n=18,690), Gen X players (n=9,989), Baby Boomer players (n=1,920)

Appealing game features align with generations' genre preferences

While younger generations value exploration and open worlds as well as multiplayer aspects, puzzle-solving aspects top the list for Gen X and Baby Boomers

Most appealing features of video games
Base: Total payers | Top 3 of 14

Rank	Gen Alpha	Gen Z	Millennials	Gen X	Baby Boomers
#1	Exploration & open worlds 29%	Exploration & open worlds 29%	Strong narrative or story 29%	Puzzle-solving aspects 40%	Puzzle-solving aspects 55%
#2	Multiplayer and social aspects 29%	Multiplayer and social aspects 29%	Exploration & open worlds 28%	Game theme or setting 27%	Game theme or setting 25%
#3	Game theme or setting 26%	Game theme or setting 28%	Game theme or setting 28%	Exploration & open worlds 25%	Elements of luck or chance 21%

When it comes to the most appealing game features across generations, the significance of social elements for Gen Alpha and Gen Z stands out. In contrast, puzzle-solving holds a special appeal for Gen X and Baby Boomers, aligning with the genre's popularity among these age groups. Notably, a compelling narrative or story only ranks among the top three for Millennials. This preference may be linked to their gaming experiences in the 90s and 2000s when narrative-driven games were prevalent, influencing their strong interest in exploration.

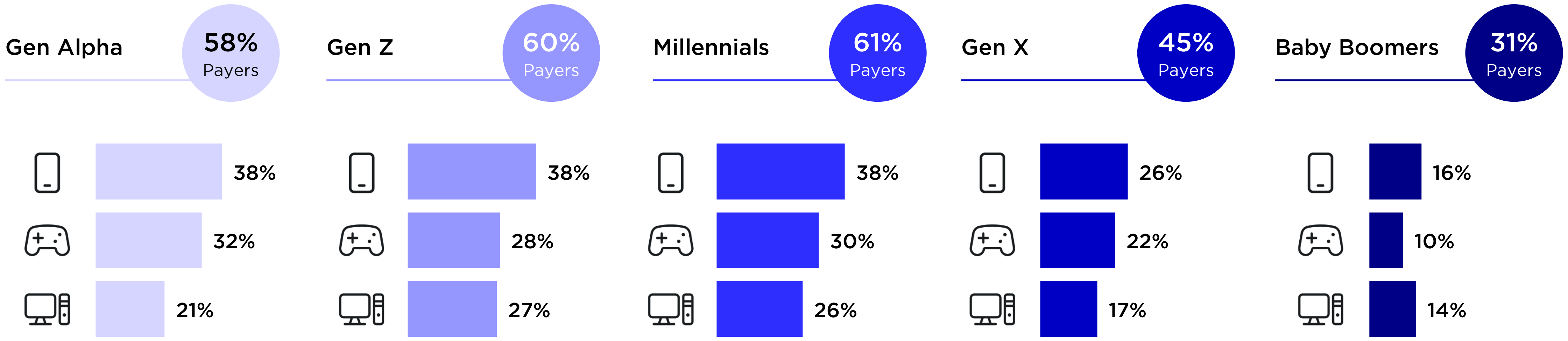
Source: Newzoo Global Gamer Study 2023 (Global weighted average across 36 markets)
Q. Appealing features of games
Base: Gen Alpha players (n=4,867), Gen Z players (n=22,574), Millennial players (n=18,690), Gen X players (n=9,989), Baby Boomer players (n=1,920)

Spending habits and motivations across generations

Younger generations are more likely to spend on video games

Approximately 6 out of 10 of Gen Alpha, Gen Z, and Millennials have spent money on video games and in-game in the past six months

Share of payers per platform
Base: Total players



[1]Payers (past 6 months): Payers are defined as players that, on average, spend money on a monthly basis on games on a PC, console, or mobile device. Spending money on games also includes gifts, downloadable content, subscriptions, and other micro-transactions.

See more game spending statistics across 36 different countries.

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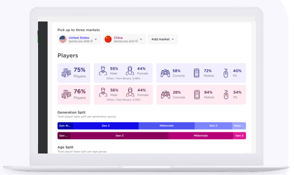
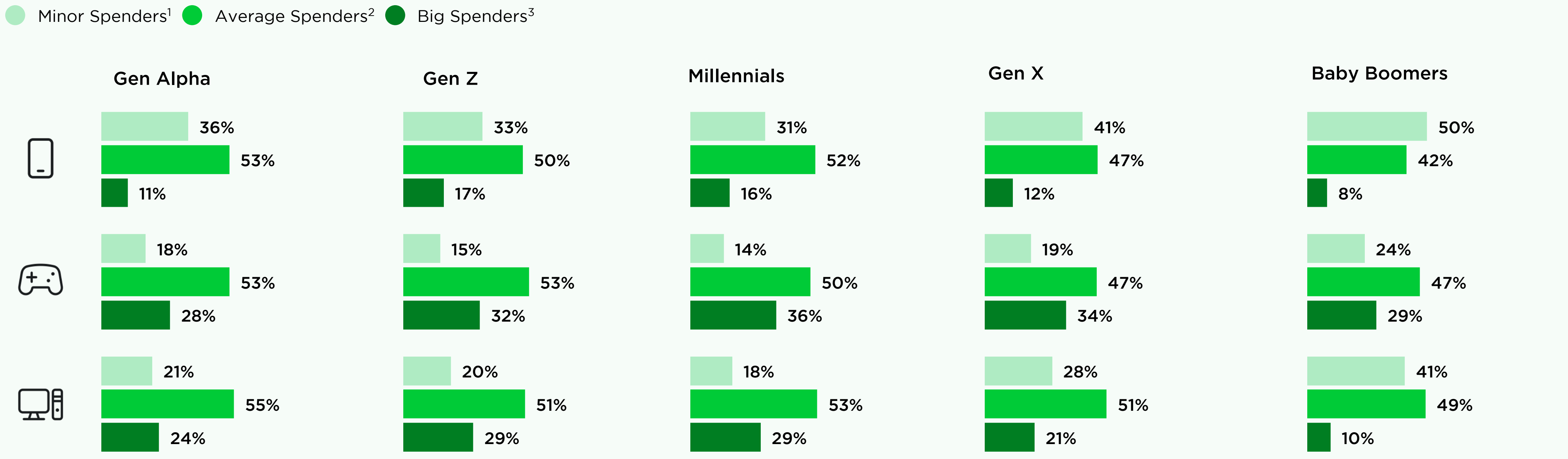


Source: Newzoo Global Gamer Study 2023 (Global weighted average across 36 markets)
Q. Payers (past 6 months)
Base: Gen Alpha players (n=4,867), Gen Z players (n=22,574), Millennial players (n=18,690), Gen X players (n=9,989), Baby Boomer players (n=1,920)

Gen Z and Millennials are the most likely to be big spenders

Unsurprisingly, console has the highest share of big spenders and mobile the lowest across generations

Spending segments per platform (past 6 months)
Base: Mobile, console, or PC payers



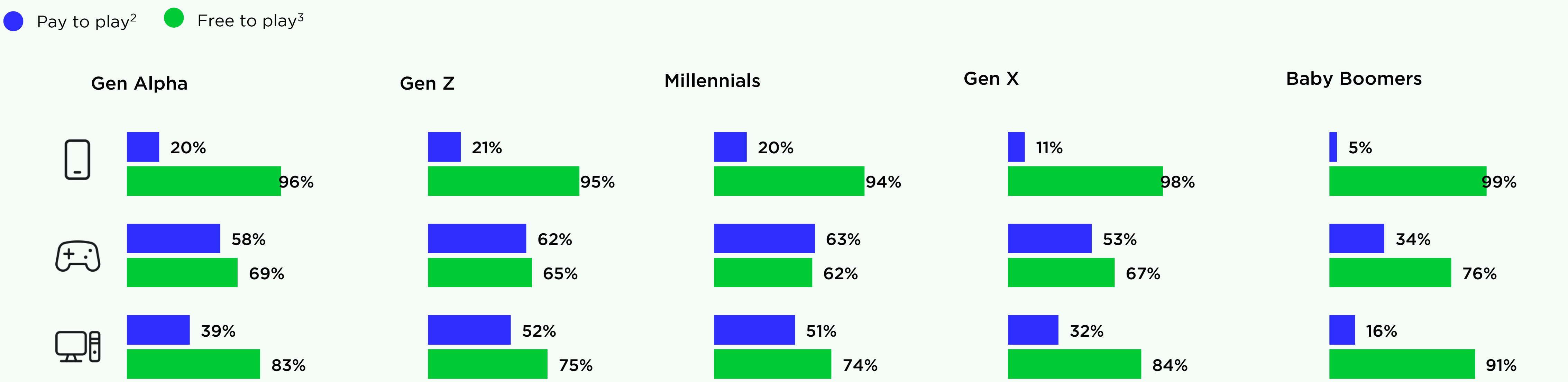
[1]Minor spenders: up to £/€/$5 a month
[2]Average spenders: between £/€/$5 – £/€/$25 a month
[3]Big spenders: £/€/$25 or more a month

Source: Newzoo Global Gamer Study 2023 (Global weighted average across 36 markets)
Q. Money spent per month on [PLATFORM] games (past 6 months)
Base: Gen Alpha mobile payers (n=1,760), Gen Z mobile payers (n=8,016), Millennial mobile payers (n=6,735), Gen X mobile payers (n=2,525), Baby Boomer mobile payers (n=272); Gen Alpha console payers (n=1,587), Gen Z console payers (n=6,241), Millennial console payers (n=5,721), Gen X console payers (n=2,165), Baby Boomer console payers (n=188); Gen Alpha PC payers (n=1,093), Gen Z PC payers (n=6,757), Millennial PC payers (n=5,164), Gen X PC payers (n=1,800), Baby Boomer PC payers (n=271)

Younger generations are more likely to play pay-to-play games

Free-to-play games are the most popular type of game across platforms

Game types played per platform[1]
Base: Mobile, console, or PC Gamers



[1] Please note this was a multiple select question which is why the shares doe not add up to 100%
[2] "Pay to Play" games, where you pay upfront to play (either via a subscription, a download fee or by buying a boxed product).
[3] "Free to Play" games, where you can start playing a game for free, but can pay for additional in-game items (such as loot boxes, extra lives, time savers, etc.).

The free-to-play model is dominant across platforms for all generations. Console is the most common platform for pay-to-play games, likely related to the popularity of subscription services. Console is also the only platform where the share of pay-to-play and free-to-play games gets close among Gen Z and Millennials. Baby Boomers are the least likely to play pay-to-play games, which aligns with the cohort's higher interest in casual titles (often free-to-play).

Source: Newzoo Global Gamer Study 2023 (Global weighted average across 36 markets)
Q. Payers (past 6 months)
Base: Gen Alpha players (n=4,867), Gen Z players (n=22,574), Millennial players (n=18,690), Gen X players (n=9,989), Baby Boomer players (n=1,920)

In-game currencies are the top in-game item purchased across generations

Playable characters or heroes seem to appeal more to Gen Alpha and Gen Z when it comes to spending money in games

In-game items spent money on (past 6 Months) | Top 3 out of 13
Base: Total payers

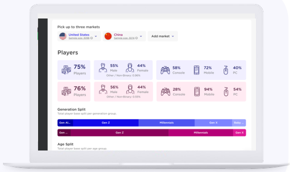
	Gen Alpha	Gen Z	Millennials	Gen X	Baby Boomers
#1	In-game currencies **30%**	In-game currencies **31%**	In-game currencies **29%**	In-game currencies **25%**	In-game currencies **24%**
#2	Playable characters or heroes **29%**	Playable characters or heroes **26%**	Expansion or content packs **27%**	Gear **21%**	Expansion or content packs **15%**
#3	Gear **29%**	Expansion or content packs **26%**	Gear **25%**	Expansion or content packs **20%**	Gear **12%**

In-game spending can tell you a lot about what different generations value in their gaming lives. Generational spending habits can also help developers and publishers mold monetization strategies to fit their audience preferences.

While every generation directs ample spending to in-game currencies, younger generations tend to part ways with their (or their parent's) cash on playable characters. Younger players may want to see themselves reflected in games more, which contrasts with the spending habits of Gen X and Baby Boomers. These cohorts spend more on utilitarian purchases like gear and content packs.

See what else gamers from different generations spend on.

newzoo.com/global-gamer-study



Source: Newzoo Global Gamer Study 2023 (Global weighted average across 36 markets)
Q. In-game items/virtual goods spent money on (past 6 months)
Base: Gen Alpha payers (n=2,838), Gen Z payers (n=13,555), Millennial payers (n=11,291), Gen X payers (n=4,524), Baby Boomer payers (n=588)

Unlocking extra/exclusive content motivates every generation to spend

Older generations seem to be more likely to be drawn to special offers and spending to expedite their progress in the game

Main reasons to spend money on video games | Top 3 of 13
Base: Total Payers

Rank	Gen Alpha		Gen Z		Millennials		Gen X		Baby Boomers	
#1	Unlock extra / exclusive playable content	38%	Unlock extra / exclusive playable content	37%	For a sale / special offer / good price	35%	For a sale / special offer / good price	37%	For a sale / special offer / good price	40%
#2	Personalize characters or things built in-game	35%	For a sale / special offer / good price	33%	Unlock extra / exclusive playable content	33%	Advance quicker / easier in the game	29%	Advance quicker / easier in the game	28%
#3	Play with friends or family	32%	Personalize characters or things built in-game	31%	Play with friends or family	28%	Unlock extra / exclusive playable content	28%	Unlock extra / exclusive playable content	25%

Once again, we see how much younger players value social elements in gaming (enough to spend on them). Gen Alpha and Millennial players rank playing with friends or family in their top three reasons to spend on video games. Interestingly, Gen X and Baby Boomers dedicate significant spending to advance quicker through games or to make them easier, which may stem from these cohorts having work or family commitments that clash with gaming.

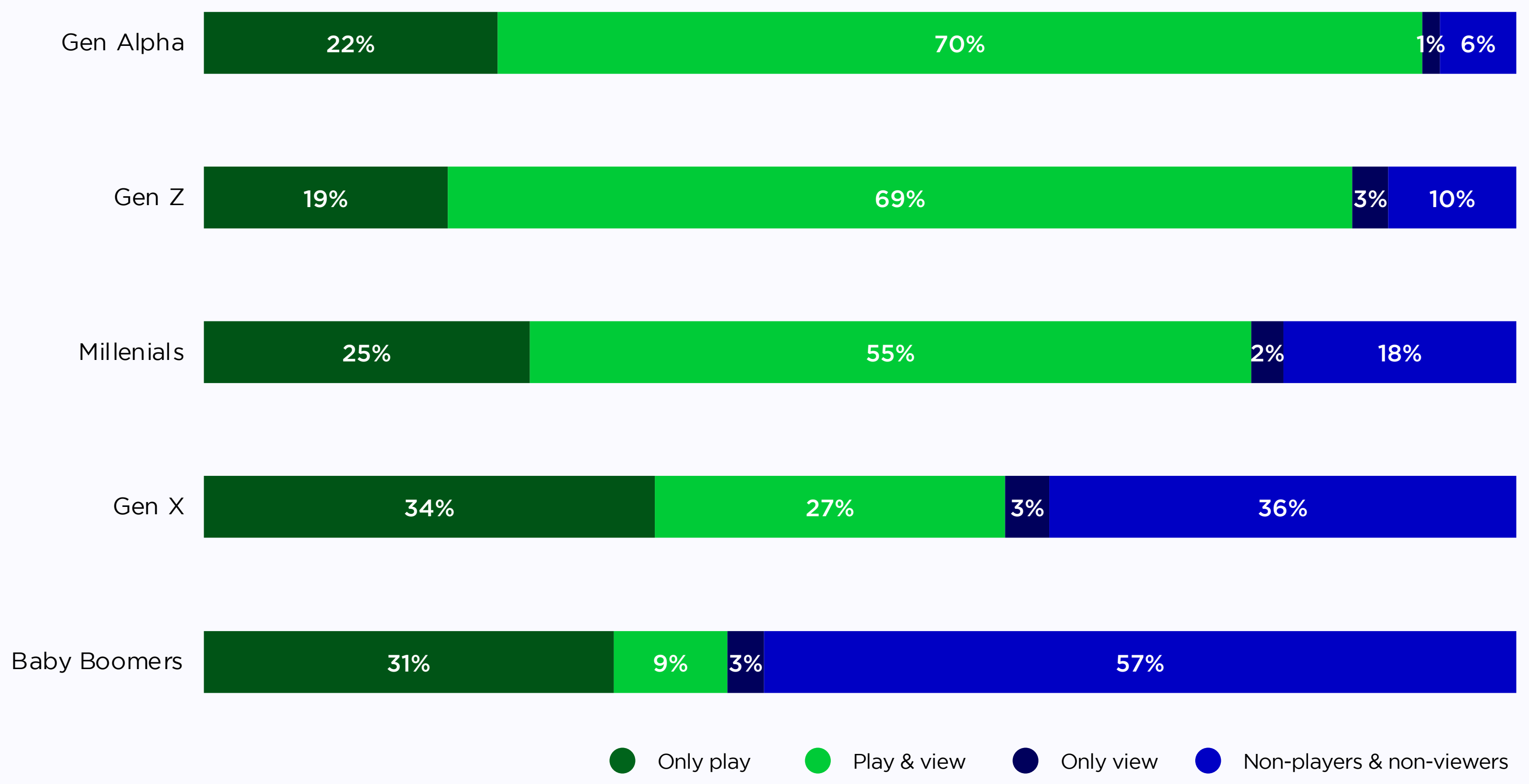
Source: Newzoo Global Gamer Study 2023 (Global weighted average across 36 markets)
Q. Main reasons to spend money on video games
Base: Gen Alpha payers (n=2,838), Gen Z payers (n=13,555), Millennial payers (n=11,291), Gen X payers (n=4,524), Baby Boomer payers (n=588)

Viewing habits across generations

Majority of younger generations engage in both playing and viewing

Baby Boomers tend to only play games, rather than engaging as viewers or via other dimensions

Player viewer overlap
Base: Total online population



Gaming videos and video content orbiting the gaming world are hugely popular and essential entrances to engagement.

Remarkably, seven out of ten Gen Alpha and Gen Z players, along with over half of Millennials, both play video games and consume gaming content. In the case of Gen X, both playing and viewing are prevalent, while Baby Boomers typically lean towards playing games exclusively.

All of this emphasizes the vital role of video content and viewing audiences in how publishers and developers approach engagement for their games.

Source: Newzoo Global Gamer Study 2022 (Global weighted average across 36 markets)
Q. Player Viewer Overlap
Base: Generation Alpha (n=5,182), Gen Z (n=25,494), Millennials (n=22,942), Gen X (n=15,868), Baby Boomers (n=4,809)

Esports also notably more popular among younger generations

Across generations, there is a significant gulf between the percentage of players who have engaged with viewing gaming content and esports in the past 12 months

Share of game enthusiasts, viewers & esports audience
Base: Total online population

	Gen Alpha	Gen Z	Millennials	Gen X	Baby Boomers
Total online population	100%	100%	100%	100%	100%
% game enthusiasts[1]	94%	90%	82%	64%	43%
% viewers[2]	72%	72%	57%	30%	11%
% esports audience[3]	36%	37%	30%	12%	3%

1 Game Enthusiasts are consumers who engage with gaming through playing, viewing, owning, and/or social behavior
2 Viewers are those who watched live-streamed or pre-recorded gaming video content in the past 12 months
3 Esports Audience are those who watched professional competitive gaming (esports) video content in the past 12 months

Source: Newzoo Global Gamer Study 2023 (Global weighted average across 36 markets)
Q. Game enthusiasts, Gaming video content viewers (past 12 months), Esports segmentation
Base: Generation Alpha (n=5,182), Gen Z (n=25,494), Millennials (n=22,942), Gen X (n=15,868), Baby Boomers (n=4,809)

Gameplay video content has the widest appeal among viewers

Reviews, as well as video game/hardware trailers stand out among older viewers

Top 3 general types of gaming video content typically watched (past 12 months) | Top 3 of 11
Base: Total viewers

Rank	Gen Alpha		Gen Z		Millennials		Gen X		Baby Boomers	
#1	Gameplay	**49%**	Gameplay	**47%**	Gameplay	**44%**	Gameplay	**37%**	Reviews	**30%**
#2	Tips & Tricks	**42%**	Comedic gaming videos / Compilations	**38%**	Video game / Hardware trailers	**37%**	Video game / Hardware trailers	**34%**	Video game / Hardware trailers	**26%**
#3	Comedic gaming videos / Compilations	**39%**	Content created by my favorite streamer(s) / Content creator(s)	**37%**	Tips & Tricks	**34%**	Tips & Tricks	**33%**	Gameplay	**24%**

In the current age of content creators and gaming streamers (including a growing cadre of influencers), it's no wonder that comedic gaming videos and compilations are notably popular among younger generations. Gen Alpha and Gen Z players are more attuned to video games and entertainment being intertwined. Meanwhile, older generations appear to use video content more informationally. For instance, reviews rank highest for Baby Boomers.

Regardless of generational preferences, gaming video content is an increasingly compelling avenue for developers and publishers to connect more with their players outside game ecosystems.

Source: Newzoo Global Gamer Study 2023 (Global weighted average across 36 markets)
Q. General types of gaming video content typically watched (past 12 months)
Base: Gen Alpha viewers (n=3,831), Gen Z viewers (n=18,507), Millennial viewers (n=13,336), Gen X viewers (n=5,015), Baby Boomer viewers (n=550)

Inspiration and high-level gameplay are key reasons to view

Reasons for viewing are quite consistent across generations

Top 3 motivations to view | Rated 5, 6, or 7 out of 7; Top 3 out of 5
Base: Total viewers

	Gen Alpha		Gen Z		Millennials		Gen X		Baby Boomers	
#1	Get ideas on things to do in games and new ways to play	81%	See high-level gameplay / skills	75%	Get ideas on things to do in games and new ways to play	76%	Get ideas on things to do in games and new ways to play	68%	Get ideas on things to do in games and new ways to play	48%
#2	See high-level gameplay / skills	80%	Get ideas on things to do in games and new ways to play	74%	See high-level gameplay / skills	75%	See high-level gameplay / skills	67%	See high-level gameplay / skills	44%
#3	Learn from other (professional) players	78%	Learn from other (professional) players	72%	Learn from other (professional) players	72%	Learn from other (professional) players	65%	Learn from other (professional) players	43%

See how viewership preferences vary across different regions and markets.

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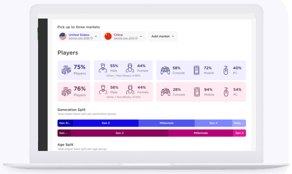


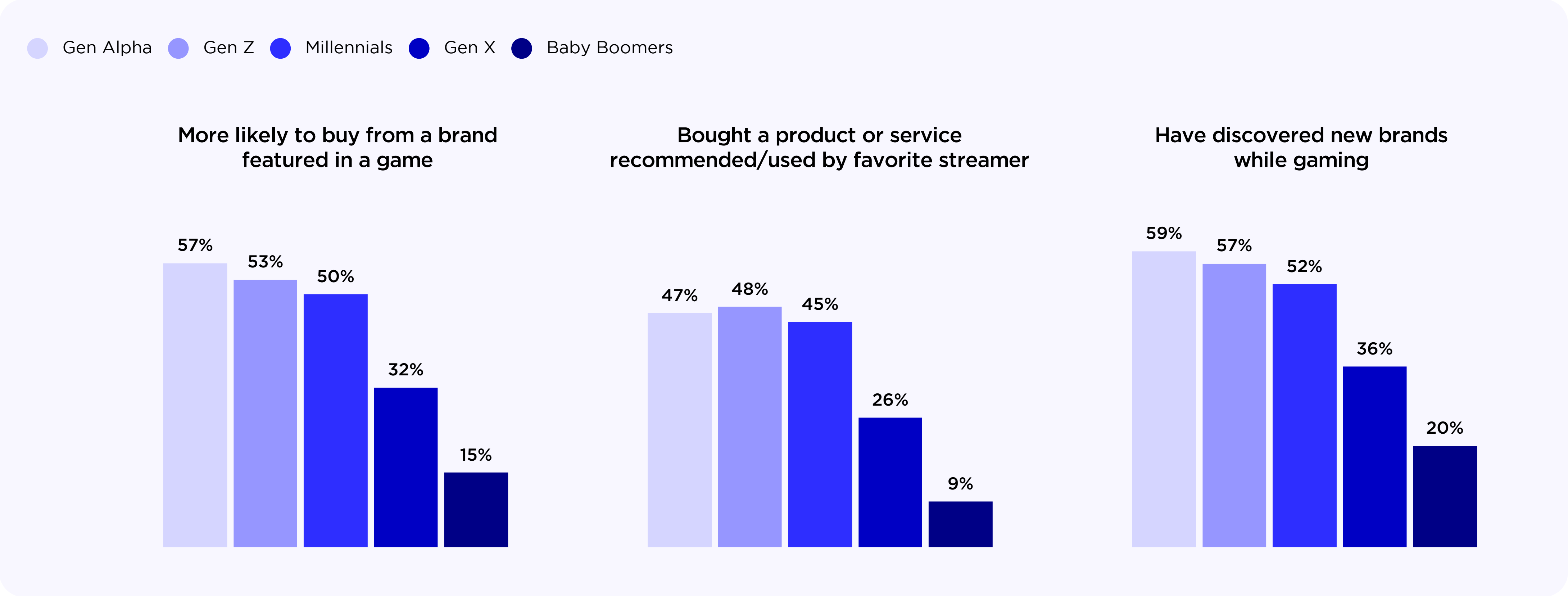
Source: Newzoo Global Gamer Study 2023 (Global weighted average across 36 markets)
Q. Motivation to watch gaming video content (statements)
Base: Gen Alpha viewers (n=3,831), Gen Z viewers (n=18,507), Millennial viewers (n=13,336), Gen X viewers (n=5,015), Baby Boomer viewers (n=550)

Generational insights for consumer brands

Over half of younger players have discovered new brands while gaming

Brand collaborations in games and with streamers appear to influence purchasing decisions

Attitudes towards brand advertisement and endorsement in gaming | % Completely agree/ Strongly agree/ Agree
Base: Total players and/or viewers

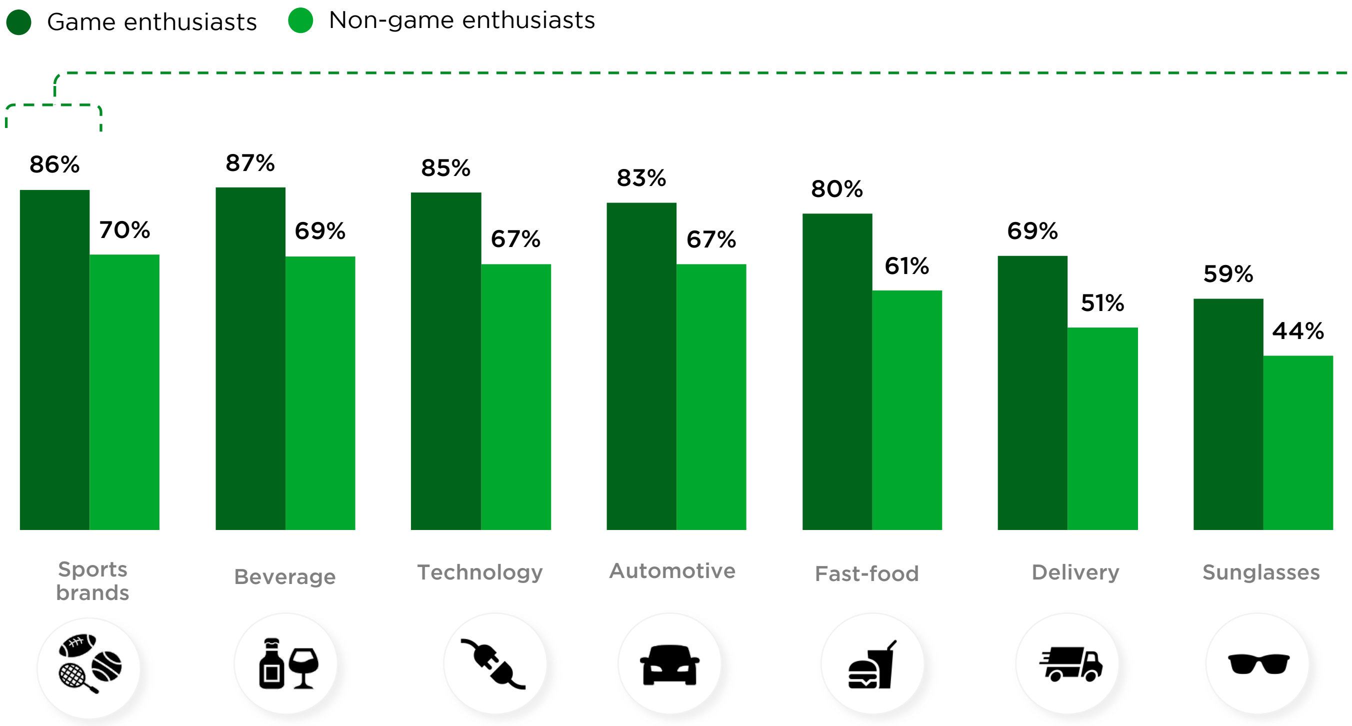


Source: Newzoo Global Gamer Study 2023 (Global weighted average across 36 markets)
Q. Brand statements
Base: Gen Alpha players and/or viewers (n=4,939), Gen Z players and/or viewers (n=23,232), Millennial players and/or viewers (n=19,217), Gen X players and/or viewers (n=10,428), Baby Boomer players and/or viewers (n=2,031)

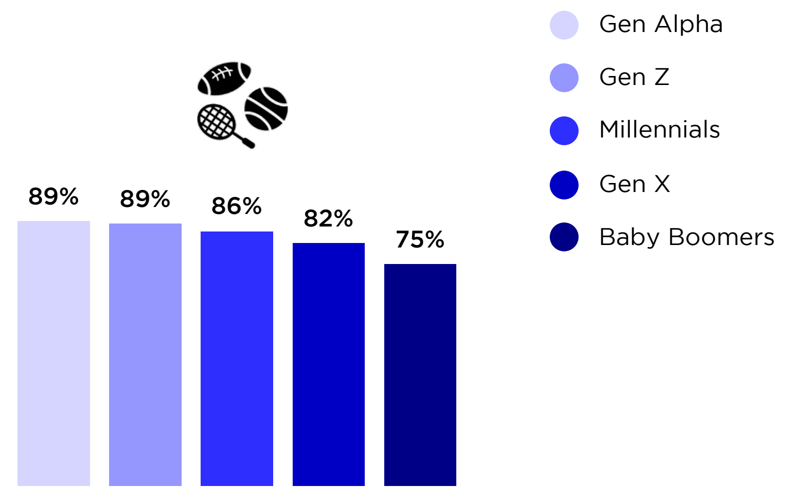
Across categories, game enthusiasts have more positive brand attitudes

When we zoom in on sports brands specifically, we see notably high brand attitudes across generations

Brand attitude per category* | % Very positive/positive
Base: Total online population



Sports Brands - Brand attitude* | % Very positive/positive
Base: Total game enthusiasts



*The brands covered per category are:

- Sports brands: Nike, Adidas, and PUMA
- Beverage: Coca-Cola, Fanta, Mountain Dew (Mtn Dew), Monster Energy, Red Bull, Budweiser, Absolut, and Ballantine's
- Technology: Apple, Intel, and Nvidia
- Automotive: BMW, Porsche, Ford, and Kia
- Fast food: McDonald's, Burger King, and Wendy's
- Delivery: FedEx, DHL, and UberEats
- Sunglasses: Ray-Ban and Oakley

See gamers' attitude towards each individual brand.

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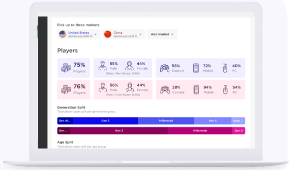


Source: Newzoo Global Gamer Study 2023 (Global weighted average across 36 markets)
Q. Brand attitude
Base: Total game enthusiasts (n=59,847), Non-game enthusiasts (n=14,448); Total game enthusiasts for alcoholic beverages (n=43,519), Non-game enthusiasts for alcoholic beverages (n=13,045)
Note: Budweiser, Absolut, and Ballentine's only shown > legal drinking age and not asked in SA, UAE, EG (excluded from base for beverage category)

Gaming platforms provide diverse opportunities for brand engagement

Marketers and advertisers can leverage video games and the communities surrounding them to reach their target audiences and entirely new cohorts in unique and creative ways

Top 3 most interesting game world activities (beyond playing the main game)
Base: Game Enthusiasts

	Gen Alpha		Gen Z		Millennials		Gen X		Baby Boomers	
#1	Attending a social get-together with friends	40%	Watching a film or TV show	35%	Watching a film or TV show	35%	Getting together with family to catch up	38%	Getting together with family to catch up	45%
#2	Watching a film or TV show	39%	Attending a social get-together with friends	35%	Attending a social get-together with friends	33%	Watching a film or TV show	34%	Watching a film or TV show	31%
#3	Getting together with family to catch up	35%	Watching a live sporting event / esports	30%	Getting together with family to catch up	31%	Attending a social get-together with friends	31%	Attending a concert / show	31%

Across generations, connecting with others remains a top priority for game enthusiasts, underscoring the power of video games to foster connections. Within the gaming realm, brands can establish a digital presence and create interactive experiences to strengthen consumer relationships.

Source: Newzoo Global Gamer Study 2023 (Global weighted average across 36 markets)
Q. Most interesting game world activities
Base: Gen Alpha game enthusiasts (n=4,591), Gen Z game enthusiasts (n=21,071), Millennial game enthusiasts (n=16,543), Gen X game enthusiasts (n=7,659), Baby Boomer game enthusiasts (n=1,054)

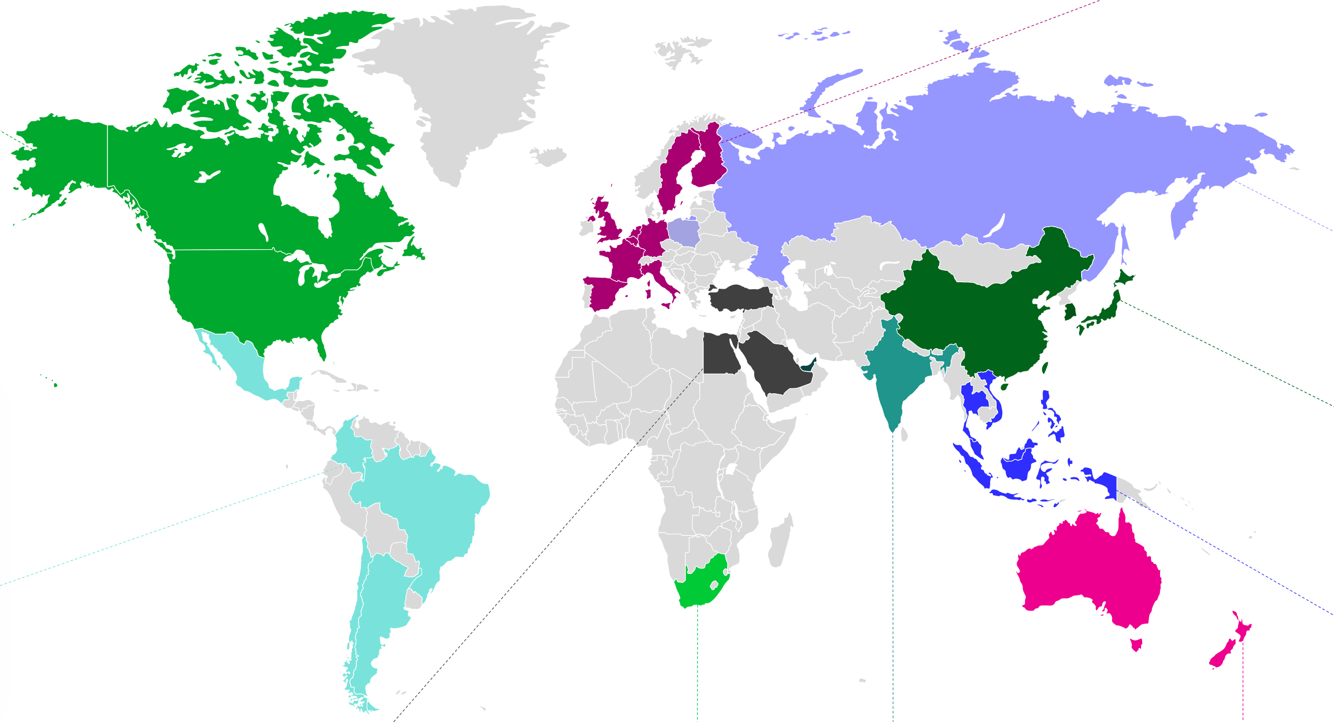
Upgrade to the Global Gamer Study

	This free report	Global Gamer Study
Access to global gamer data across 36 different markets, including the US, India, and China	Only aggregated globally	Each market and aggregated globally and regionally
In-depth country-level gamer profile breakdowns		✓
Full demographic and psychographic gamer profiles covering 200+ variables		✓
Trend data from 2022 to 2023	Only 2023	✓
Gaming behavior across all platforms	Limited	✓
Playing and viewing motivations and attitudes	Limited	✓
Spending behavior and motivations	Limited	✓
Media, lifestyle, and consumer brands consumption	Limited	✓
60+ brand funnels for popular game franchises		✓
Newzoo's proprietary Gamer Personas and custom variables		✓
Access to easy-to-use consumer insights dashboard		✓

Learn more about the Global Gamer Study

Interested? Email us at:
questions@newzoo.com

The Global Gamer Study 2023 covers 36 markets



Western Europe (9)	
Market	Availability
Belgium	✓
Finland	✓
France	✓
Germany	✓
Italy	✓
Netherlands	✓
Spain	✓
Sweden	✓
UK	✓

North America (2)	
Market	Availability
United States	✓
Canada	✓

Eastern Europe (2)	
Market	Availability
Poland	✓
Russia	✓

Latin America (5)	
Market	Availability
Argentina	✓
Brazil	✓
Chile	✓
Colombia	✓
Mexico	✓

Eastern Asia (4)	
Market	Availability
China	✓
Japan	✓
South Korea	✓
Taiwan	✓

Middle East and Northern Africa (4)	
Market	Availability
Egypt	✓
Saudi Arabia	✓
Turkey	✓
United Arab Emirates	✓

Sub-Saharan Africa (1)	
Market	Availability
South Africa	✓

Central Southern Asia (1)	
Market	Availability
India	✓

Oceania (2)	
Market	Availability
Australia	✓
New Zealand	✓

Southeast Asia (6)	
Market	Availability
Indonesia	✓
Malaysia	✓
Philippines	✓
Singapore	✓
Thailand	✓
Vietnam	✓

Appendix

Markets, topics, and franchises covered in the Global Gamer Study 2023

Global Gamer Study: 2023 topic list

Socio-Demographics

- Gender
- Age
- Generations
- Education*
- Household income*
- Work situation
- Parental or legal guardian status

Media & Lifestyle

- Leisure time spent per week on various activities (e.g., reading, watching broadcast television, using social media)
- Social media and chat applications actively used (P6M)
- Favorite hobbies
- General interests most interested in
- Following/watching of professional sports regularly
- Professional sports watched/streamed regularly (P6M)
- Media subscriptions currently used (e.g., Spotify Premium, Netflix, Disney+, Apple TV+)
- TV channels watched most often*

Mobile & Internet

- Brand main cellphone
- Main cellphone: feature phone or smartphone
- Main cellphone operating system
- Cellphone network provider*
- Household internet service provider (ISP)*

Game Behavior & Attitudes

- Total share of players and non-players per market (P6M)
- Total share of players per platform (P6M)
- Reasons for playing games
- Non-players: past play behavior & intention to play (N6M)
- Play frequency per platform
- Time spent per week playing per platform
- Game mode played most per platform
- Importance of social features in games (statements)
- Favorite platform to play games on
- Appealing features of games
- Appealing themes/settings of games
- Gamer identity (statements)
- Frequency socialized through/visited online gaming communities or social media groups (P12M)
- Frequency talked about video games with family, friends, or other significant others (P12M)
- Frequency visited websites/blogs or listened to podcasts to keep up to date on latest gaming news (P12M)
- Frequency attended large gaming conventions in-person (P12M)
- Gaming subscription awareness and usage
- Type of games played per platform (i.e.,“F2P”, “P2P”)
- DEI important aspects in video games NEW!
- DEI related statements related to playing NEW!

Spending Behavior

- Total share of paying players per platform
- Money spent per month per platform (Minor, Average, or Big Spenders)
- Main reasons to spend money on video games
- PC/mobile games: payment method used*
- Money spent on in-game items or virtual goods (P6M)
- In-game items/virtual goods spent money on (P6M)
- Impact of a game item/virtual good being branded on likelihood to buy NEW!

*Country/market specific topics.
(P[]M)/(N[]M) = Past [] months, Next [] months

Global Gamer Study: 2023 topic list

Franchises

- Franchise funnel (i.e., awareness and play behavior)
- Devices played on (P6M)
- Franchises played per platform

Mobile Games

- Mobile devices used to play mobile games (P6M)
- App stores used to download mobile games
- Genres played on mobile devices (P6M)
- RPG subgenres played on mobile devices (P6M)

PC Games

- Type of PC games played (i.e, browser, downloaded/boxed)
- Main PC system for playing downloaded/boxed PC games
- Main PC brand for playing downloaded/boxed PC games
- Frequency used PC game launchers (P6M; e.g., Epic Games Store, Steam)
- Genres played on PC (P6M)
- RPG subgenres played on PC (P6M)
- PC budget spent on (P6M)

Console Games

- Console played games on (P6M)
- Owned console
- Genres played on game console (P6M)
- RPG subgenres played on console (P6M)
- Console budget spent on (P6M)

Cloud Gaming

- Cloud gaming awareness
- Tried cloud gaming

Gaming Video Content & Esports

- Gaming video content watched (i.e., live-streamed, pre-recorded)
- Frequency watching live streamed and pre-recorded gaming video content on various platforms (P12M)
- Esports awareness
- Frequency watching esports (P12M)
- Types of gaming video content typically watched (P12M; e.g., reviews, gameplay, tips & tricks)
- Gaming video content regularly watched (P12M; e.g., CS:GO, League of Legends, Dota 2, Fortnite)
- Type of gaming video content per game regularly watched (P12M; i.e., esports, general gaming video content)
- Esports franchises regularly watched (P12M)
- Motivation to watch video gaming content (statements)
- Frequency followed video gaming channels or esports broadcasters (P12M)
- Frequency paid for a monthly subscription to video gaming channels or esports broadcasters (P12M)
- Frequency donated money (non-re-occurring) to video gaming channels or gaming content creators (P12M)
- Frequency created gaming-related content (P12M)
- Esports franchises played (P6M)

Gaming Hardware & Peripherals

- Average spent per year on gaming hardware (past 3 years)
- Reasons to buy gaming hardware (statements)
- Gaming peripheral ownership
- Gaming peripheral intention to buy (N6M)
- Gaming peripheral brand awareness

Consumer Brands

- Brand attitude (e.g., Coca-Cola, Nike, Porsche)
- Brands and gaming-related statements NEW!
- Consumption while gaming/viewing
- Beverage brand consumption while gaming/viewing

Socializing in Game Worlds

- Frequency socialized in virtual game worlds (outside of playing main game) (P12M) NEW!
- Likelihood of socializing in a game world in future (beyond playing the main game) NEW!
- Most interesting game world activities (outside of playing main game) NEW!
- Time spent per week socializing in virtual game worlds (outside of playing main game (P12M) NEW!

Newzoo's Gamer Segmentation™

- Covering unique personas based on gaming, viewing, owning, and social behavior

*Country/market specific topics.
(P[]M)/(N[]M) = Past [] months, Next [] months

Global Gamer Study: 2023 franchise list

Covering the high-level play funnel and devices played on. For more granular and continuously tracked game-level consumer insights, please consult our Game Health Tracker.

- Among Us
- Anipop (only in CN)
- Apex Legends
- Assassin's Creed
- Borderlands
- Brawlhalla (not in CN, KR)
- Call of Duty
- Candy Crush Saga (not in CN)
- Civilization
- Clash (incl. Clash of Clans, Clash Royale, and others)
- Counter-Strike
- Dead by Daylight
- Dead Island (not in CN, KR, JP)
- Destiny
- Diablo (incl. Diablo Immortal)
- Dota 2
- Dragon Quest
- Dungeon & Fighter / Dungeon Fighter Online (only in CN, KR)
- Dungeons & Dragons
- Elden Ring
- Fall Guys
- Fantasy Westward Journey / Westward Journey Online (only in CN)
- Fate (incl. Stay Night, Grand Order, and Tsukihime etc) (only in JP)
- FIFA
- Final Fantasy
- Fortnite (not in CN)
- Forza
- Genshin Impact
- God of War
- Golf With Your Friends
- Gran Turismo
- Grand Theft Auto (GTA)
- Halo
- Harry Potter
- Hearthstone: Heroes of Warcraft
- Hell Let Loose
- Honor of Kings (only in CN, BR, EG, MX, TR)
- Kartrider (only in KR)
- Knives Out (only in JP)
- League of Legends (incl. Wild Rift)
- Light and Night (only in CN)
- Lineage (only in KR)
- Lost Ark (only in KR)
- Madden NFL (Not in CN, JP)
- Magic: The Gathering
- Mario
- Marvel (incl. Marvel Snap)
- Metro
- Minecraft
- Mobile Legends: Bang Bang (only in US, CA, TR, SE, RU, BR, MX, ID, TW, PH, VN, SG, TH, MY, AR, IN, SA, NZ, AE, EG, CO, CL)
- Mortal Kombat (not in CN, KR)
- Naraka: Bladepoint (only in CN)
- Naruto (only in CN)
- NBA 2K (not in JP)
- Need for Speed
- Overwatch 2
- Pokémon
- Project SEKAI COLORFUL STAGE! feat. Hatsune Miku (only in JP)
- QQ Speed (only in CN, ID, TW, PH, VN, SG, TH, MY, IN)
- Resident Evil
- Roblox
- Rocket League (not in CN)
- Rust (not in CN, KR, JP)
- Saints Row
- Sniper Elite (not in CN, KR, JP)
- Splatoon (only in JP)
- Star Wars
- StarCraft 2 (only in KR)
- Sudden Attack (only in KR)
- Survivor.io (only in CN)
- The Elder Scrolls
- The Legend of Zelda
- The Sims
- The Witcher
- Three Kingdoms Strategy Edition (only in CN)
- Total War
- Umamusume Pretty Derby (only in JP)
- Valorant
- World of Warcraft
- Worms

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