globalwebindex

The world of gaming

An exploration of how the gaming landscape is rapidly levelling up

INSIGHT REPORT 2020

globalwebindex.com

What's inside?

Introduction

GlobalWebIndex Insight reports take a deep-dive into the crucial topics of the industry. In this report, we focus on developments in gaming, particularly the decline of "traditional" gaming devices in favor of smartphones, and the booming esports industry, streaming and retro gaming. Among others, this report covers the following topics in detail:

01 How are traditional gaming devices faring in a market dominated by smartphones?

02 How are the behaviors and attitudes of gamers changing?

03 Which games console is the most popular worldwide?

04 How is gaming advancing towards a social network in its own right?

05 What popular genres/franchises are gamers playing?

METHODOLOGY

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

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

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

Key insights

01

Device decline

While gaming continues to grow in popularity thanks to smartphone usage, playing games on a large screen device is falling. The most dramatic decline is observed across PC/ Laptops, dropping from two-thirds of internet users gaming on the device in 2015, to less than half in 2019. Games consoles are owned by fewer people, **but have seen less steep of a decline in people gaming on them; falling instead from 3 in 10, to little over 1 in 4 over the same period of time.**

02

Retro is in

Gaming's long history means gamers are attached to several past consoles, with some devices, released as far back as 2006, still seeing engagement. **The most popular current-gen console is the Playstation 4, used by just less than half of all gamers. However its predecessor, the PS3, sees more use than Microsoft's flagship console, the Xbox One**. Driving interest in older consoles is likely down to a growing emphasis on nostalgia, with just under 2 in 10 internet users in the UK and U.S. saying they felt nostalgic about a console game in the past year.

03

Esports are more popular than ever

Over 1 in 5 internet users say they are interested in esports, rising to 4 in 10 for gamers. Though watching gameplay is considerably more popular than broadcasting one's own for the time being, the avenues for involvement are becoming easier. A common activity among younger gamers, **those aged 16 to 35 are 1.2x more likely to broadcast their gameplay in the last month.**

04

Cloud gaming here to stay

Cloud gaming offers a solution to long installation times and limited storage space, by streaming titles directly through a digital service, not unlike Netflix. **Currently, 16% of internet users say they use a cloud gaming service**, with availability limited to the likes of Playstation Now, Google Stadia and GeForce. This growing market has potential to reshape the gaming industry entirely.

05

Gaming is better together

Through online multiplayer, video games offer the opportunity to connect together in a virtual space – **just less than half of gamers played a game with their real life friends in the past year**. For some, online gaming means making new friendships or maintaining old ones in a virtual setting. Increasingly resembling a new form of social network, **1 in 3 internet users in the UK and U.S. say that the most important reason they game is to have fun with people they know.**

06

Battle Royale isn't slowing down

The shooter, played by over two-thirds of gamers, is the most popular gaming genre and contributes to a large portion of the gameplay seen in the successful string of Battle Royale franchises. **A total of 1 in 3 gamers have played a Battle Royale in the past 3 months and the genre**, the genre has spawned numerous titles aiming to jump on this enormously popular trend. Requiring no cost to download, these titles mostly generate revenue from in-game purchases, with which Battle Royale gamers are happy to comply – 1 in 3 have purchased a game-add on or DLC in the past month.

01

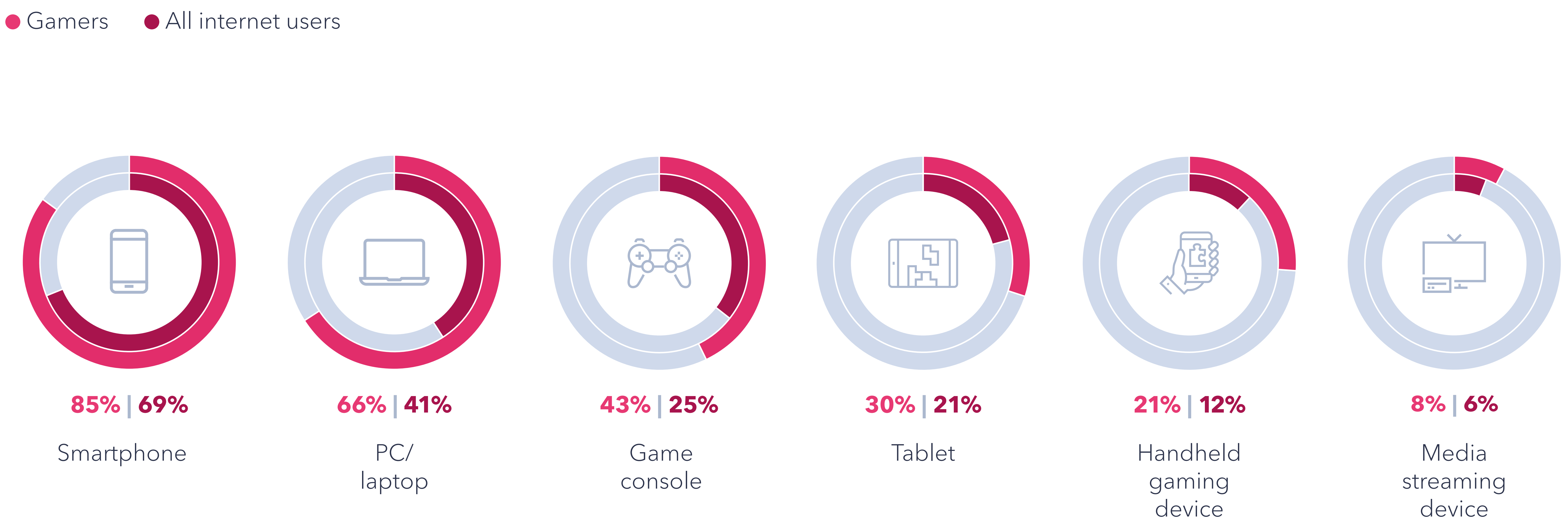
The world of gaming

Gaming overview

Device preferences

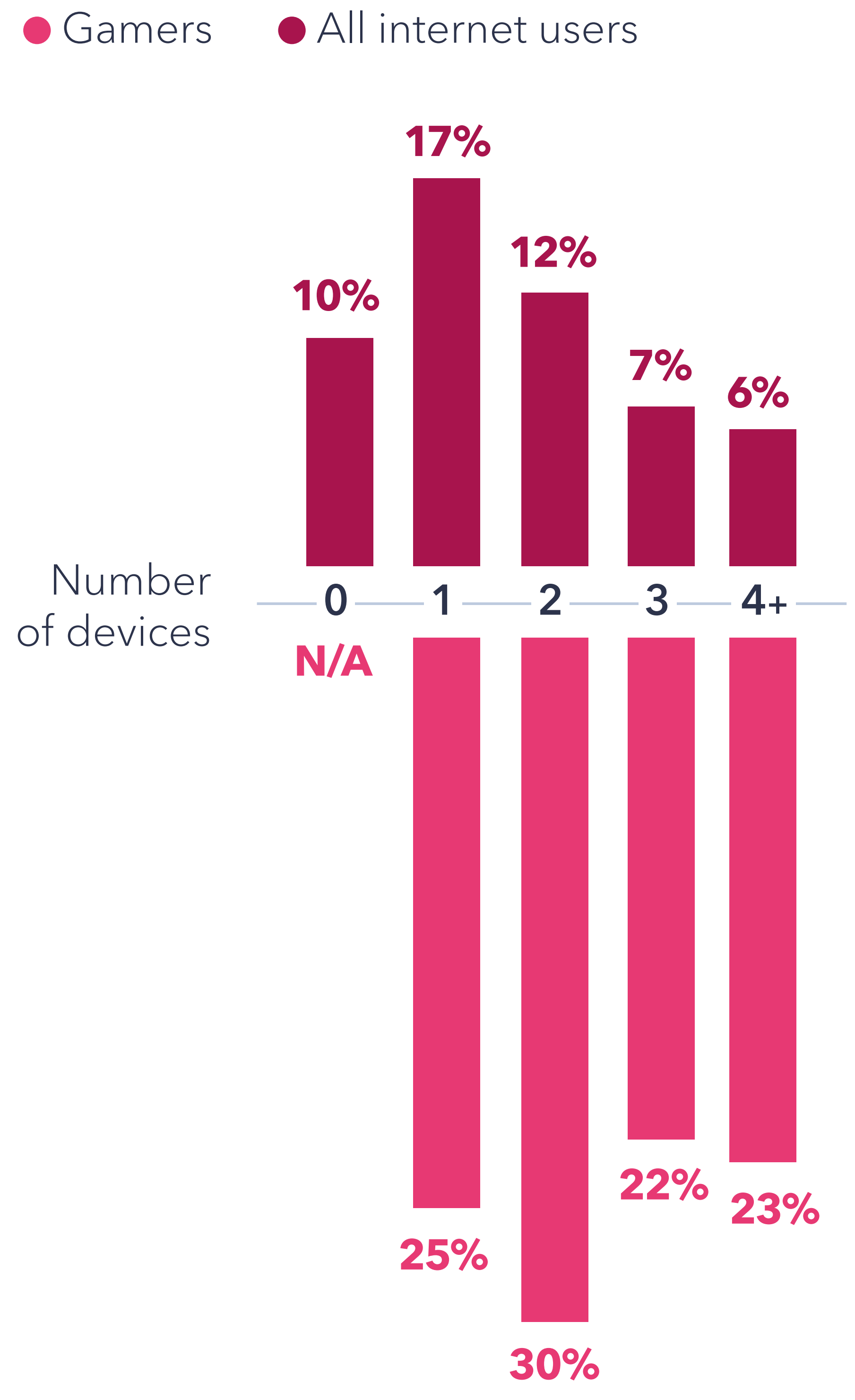
DEVICES USED FOR GAMING

% of internet users and gamers who use the following devices for gaming



NUMBER OF GAMING DEVICES USED

% of internet users and gamers who use the following number of devices for gaming



Having long since transcended from a niche interest among select audiences, gaming today is a multi-billion dollar industry. Spanning across multiple devices, **81% of internet users say they game on at least one device each month**. With 58% of those aged 55-64 gaming on any device, rising to 91% of 16-24-year-olds, gaming has the rare ability to transcend age and other demographic brackets.

There are many reasons for this. Placing online multiplayer at the heart of gaming through the likes of **Overwatch** and **Fortnite** complimented the growing interest in esports and social-streaming sites, while free-to-play titles and **successful mobile versions** of popular franchises continue to attract once-casual gamers into the activity.

Question: Which of these devices do you use to play games? | How many devices do you use for gaming?
Source: GlobalWebIndex Q3 2019 **Base:** 120,303 internet users and 23,057 gamers aged 16-64

Device breakdown

Debuting in 1972, games consoles quicky established themselves as a common gaming method, while PC's long catered to more hardcore gamers.

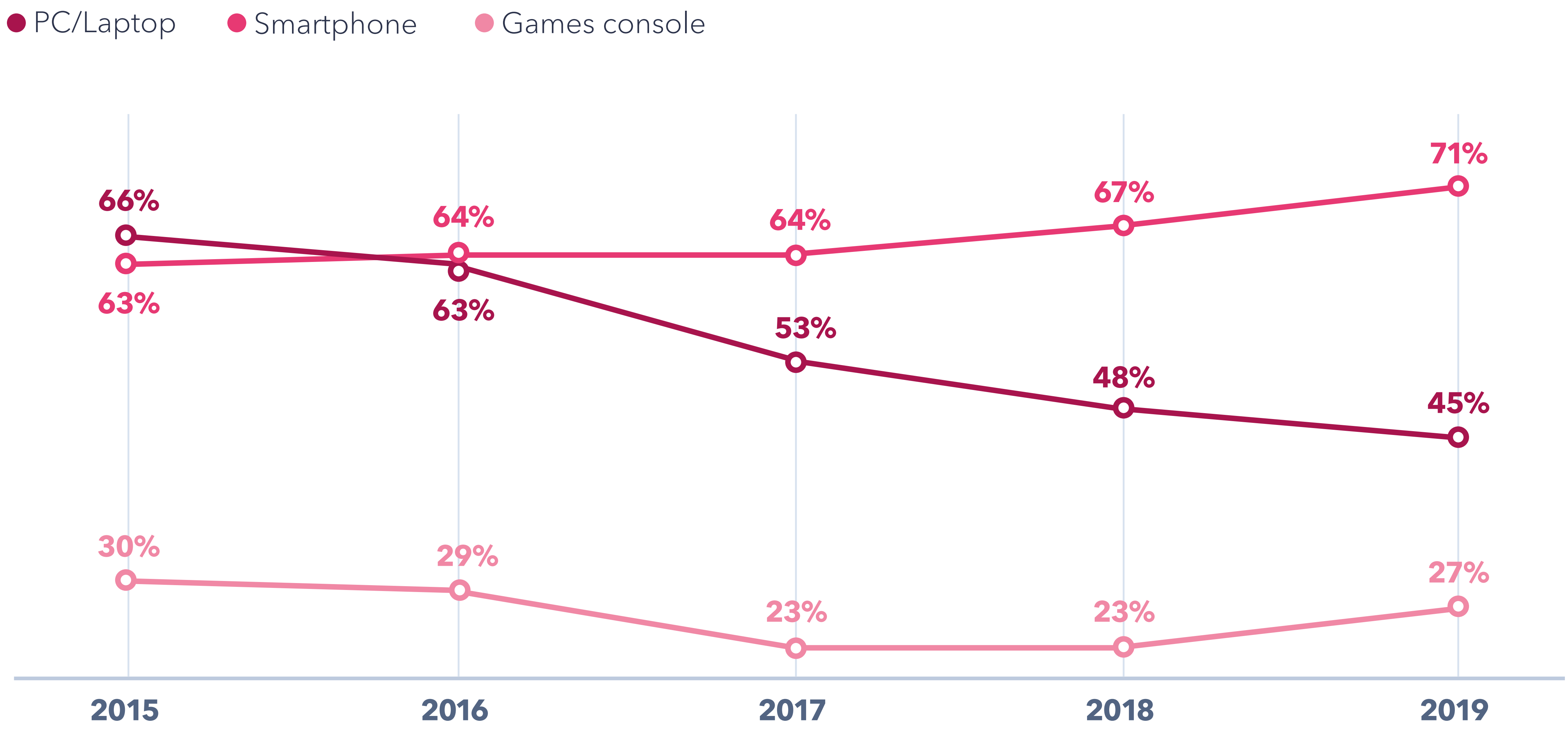
Flash-forward to 2019, and **71% of internet users are gaming on their smartphone, while PC/laptops and games consoles trail behind at 45% and 27%, respectively.** Though near universal smartphone ownership has certainly driven this figure, increasingly more powerful software and better quality games mean mobiles have a greater competitive edge than before.

PC/laptop gaming has fallen most dramatically, dropping from two-thirds playing on this device in 2015 to less than half doing so in 2019. While less people say they game on consoles, the decline is less steep, falling from 3 in 10 to little over 1 in 4. **At the forefront of console gaming are individuals aged 25-34, where 3 in 10 say they use consoles for gaming, while PCs/laptops are used for gaming by half of those aged 16-24. Instead, older audiences show a preference for smartphones**, the devices perhaps acting as "gateways" into gaming for an audience that make less likely gamers – only 17% say they are interested in gaming.

Lastly, with Sony officially discontinuing the PS Vita and Nintendo focusing solely on it's handheld-home console hybrid, **it seems the era of devoted handheld gaming devices is coming to a close, now used by little over 1 in 10 internet users**. Despite still seeing use from 1 in 5 gamers, handheld usage has been in decline for some time and faces uncertainty as smartphone gaming becomes omnipresent.

DEVICES USED FOR GAMING

% of internet users who use the following devices for gaming



Internet users aged 25-34 spend, on average, 1.5 hours a day on games consoles

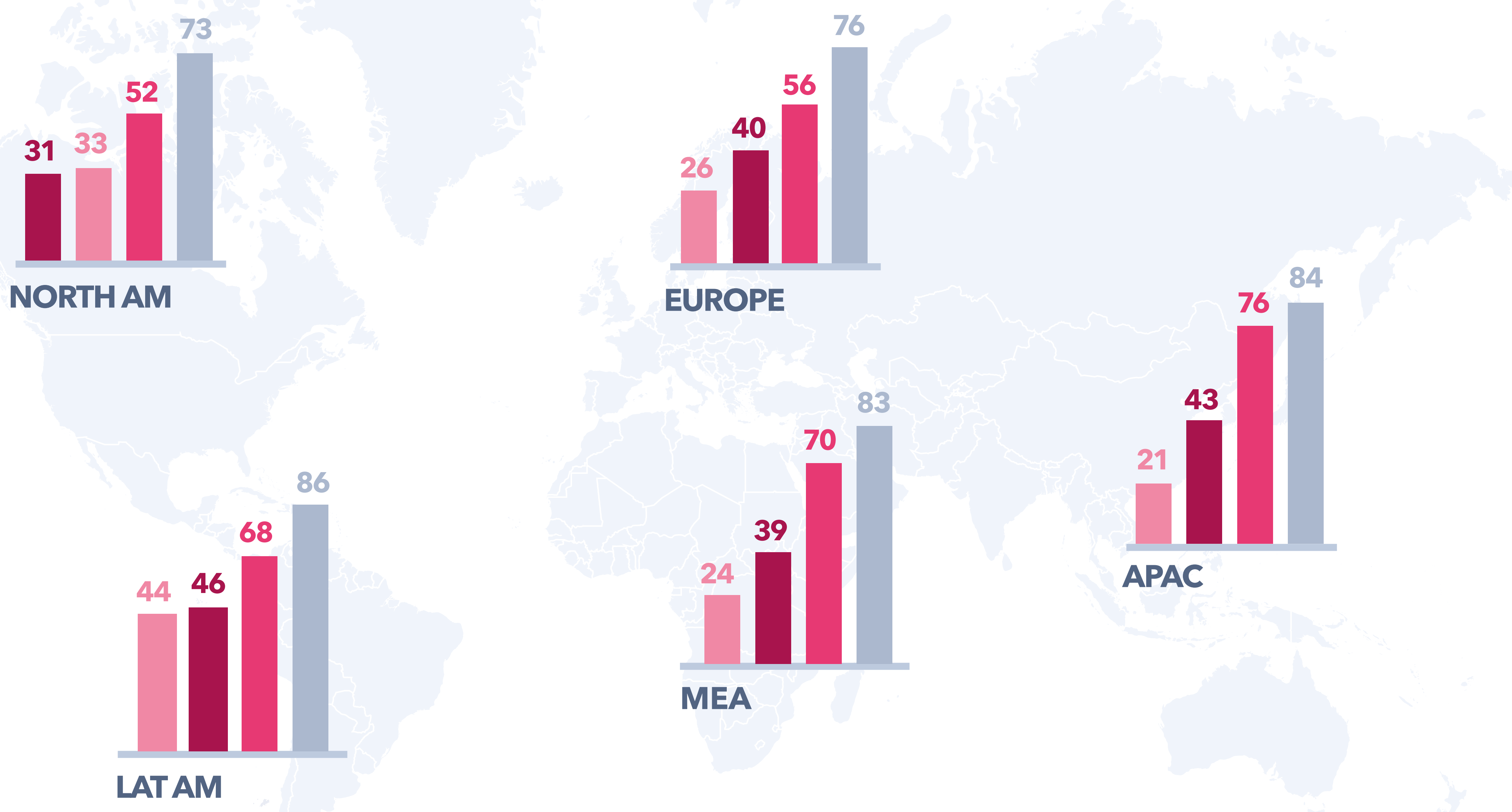
Question: Which of these devices do you use to play games? **Source:** GlobalWebIndex 2015 - 2019 (averages calculated across each wave conducted in a year) **Base:** (2015) 197,734 | (2016) 211,023 | (2017) 370,051 | (2018) 474,573 | (2019) 424,326 internet users aged 16-64

Platform profiling

ENGAGEMENT WITH GAMING

% who use the following devices for gaming

- Any device
- PC/Laptop
- Smartphone
- Games console



TOP MARKETS	ANY
Thailand	95%
Philippines	94%
Indonesia	92%

Smartphone	
Thailand	88%
Philippines	87%
Vietnam	85%

PC/Laptop	
Romania	60%
Poland	50%
Indonesia	50%

Games console	
Mexico	52%
Brazil	43%
Colombia	38%

● Smartphone ● PC/Laptop ● Games console

GENDER	ANY	Smartphone	PC/Laptop	Games console
Male	83%	69%	47%	29%
Female	79%	69%	35%	21%
AGE				
16-24	91%	79%	50%	28%
25-34	87%	76%	46%	30%
35-44	83%	71%	40%	28%
45-54	71%	57%	33%	18%
55-64	58%	42%	25%	11%
INCOME				
Bottom 25%	24%	24%	23%	20%
Mid 50%	48%	49%	49%	48%
Top 25%	21%	21%	22%	27%
Prefer not to say	7%	6%	6%	5%

Question: Which of these devices do you use to play games?
Source: GlobalWebIndex Q3 2019 **Base:** 120,303 internet users aged 16-64

Platform profiling

In general, more male gamers say they're gaming on consoles. Given just under half of males say they're interested in gaming, against 1 in 3 females, this isn't necessarily surprising. **While males generally game more across different devices, smartphone gaming is equal between genders, displaying an avenue through which gaming has become more accessible**. This device is arguably a reason for increased gaming activity among older audiences, with 42% of 55-64s gaming on smartphones.

Though largely popular, games consoles prove to be the relatively niche option for gaming, drawing the lowest figures against PCs/Laptops and smartphones in the demographics we track. Upon release, consoles demand a somewhat expensive cost price, meaning they're more likely to be used by those occupying the higher income quartiles. However, **in the LatAm region where the gaming industry is expanding rapidly**, games console engagement is strong.

LatAm presents a promising space for the gaming market. **Here, 86% of internet users are gaming on any device – with over 4 in 10 using games consoles and PCs/laptops, higher than anywhere else worldwide. Given 65% of 55-64's saying they play games here, this is important for the continued use of gaming devices in an era where smartphones are dominating the industry.**

Platform profiling

● Games console gamers
● Smartphone gamers
● PC/Laptop gamers

MOST DISTINCTIVE ATTITUDES

% who say they agree with the following statements, sorted by over-index

		IDX
I would consider myself to be much more affluent than the average	46%	1.20
Having the latest technological products is very important to me	55%	1.09
Having the latest technological products is very important to me	58%	1.14

MOST DISTINCTIVE ACTIVITIES

% who did the following gaming activities in the last month, sorted by over-index

		IDX
Used a subscription service (such as XBOX Live or PSN)	24%	2.78
Purchased a game add-on or DLC	14%	1.79
Shared an image/video of your gameplay online	16%	1.32

MOST DISTINCTIVE GAMING GENRES

% who say they have played the following genres in the past 12 months, sorted by over-index

2.29 IDX
29%
Beat'em up

1.62 IDX
20%
Beat'em up

1.27 IDX
18%
Rhythm/Music

MOST DISTINCTIVE GAME FRANCHISES

% who say they have played the following games franchises in the past 12 months, sorted by over-index

2.59 IDX
15%

1.76 IDX
23%

1.31 IDX
23%

Question: To what extent do you either agree or strongly agree with the statements below? | Which of these gaming genres have you played in the last 12 months? | Which of these gaming franchises have you played in the last 12 months? | Thinking about gaming, which of these things have you done in the last month?
Source: GlobalWebIndex Q3 2019 **Base:** 19,835 Console Gamers, 25,297 PC/Laptop gamers, 42,139 Smartphone gamers aged 16-64

Gaming activities

Downloading a free-to-play game tops gamers' monthly activities. The fact that they don't come with a purchase price attached is sure to attract gamers, casual and committed alike. A key priority for today's gamers is offering a social, multiplayer experience, with "playing online with friends" among the top gaming activities. This is prominent with younger gamers, given those aged 16-24 are 90% more likely to have played a game online with their real friends in the last month.

Purchasing the physical copy of a game now falls slightly behind purchasing the digital version, with a two-percentage-point difference between them. Digital purchases are more prominent among gamers aged 16-24, who are 87% more likely than other internet users to have made such a purchase in the past month.

Gaming has long since departed from the simple act of purchase and play. Titles often require an installation period or update before the action begins, while some no longer necessarily feature the content in its entirety. In the case of the latter, downloadable content (DLC) and scheduled releases fill in the gaps, providing additional material over a lasting period.

While male gamers skew toward purchasing extra content like DLC (Index 1.95) or signing up to a subscription service (Index 1.90), **females in this audience relish the social aspects of gaming. Their most distinctive activities include sharing an image/video of their gameplay online (Index 1.66) and gaming online with their real-life friends in the past month (Index 1.53).**

GAMING ACTIVITIES

% of gamers who have done the following in the last month

Played or downloaded a free-to-play video game	50%
Played a game online with your real-life friends	45%
Watched a live gaming stream	34%
Watched an esports tournament	24%
Shared an image/video of your gameplay online	20%
Purchased a video game from an online store/digital platorm	18%
Played a game using cloud gaming platform/streaming service	16%
Purchased a physical video game	16%
Used a subscription service (such as XBOX Live or PSN)	16%
Purchased a game add-on or DLC	13%
Broadcast a live stream of your gameplay	9%

1 in 5 millennial gamers have purchased a video game from an online store in the last month

Question: Thinking about gaming, which of these things have you done in the last month? **Source:** GlobalWebIndex Q3 2019 **Base:** 23,057 gamers aged 16-64

The console war

Ownership of multiple consoles is relatively commonplace, with Nintendo Switch owners showing the greatest prevalence of this. Over half of those who own a switch also own a PS4, while 1 in 3 own an Xbox One. The Switch's popularity perhaps boils down to its library of exclusive franchises – such as Mario and The Legend of Zelda series – but also through its portable function. Acting as an on-the-go device, Switch owners can effectively use the console anywhere they want, whilst the Playstation and Xbox consoles perhaps better serve as home systems. But, consoles don't necessarily have to be used for gaming, with such devices often doubling as entertainment systems with the ability to use video music-streaming services, play dvds or surf the internet.

As such, console owners aren't all necessarily still using their devices to play games.

As the 8th generation of consoles – such as the Playstation 4 and Xbox One – enter their "final year" as brand flagships, attention turns once more to Sony and Microsoft to deliver the much-anticipated 9th generation consoles; the **enigmatic** Playstation 5 and recently unveiled "**Xbox Series X**", respectively.

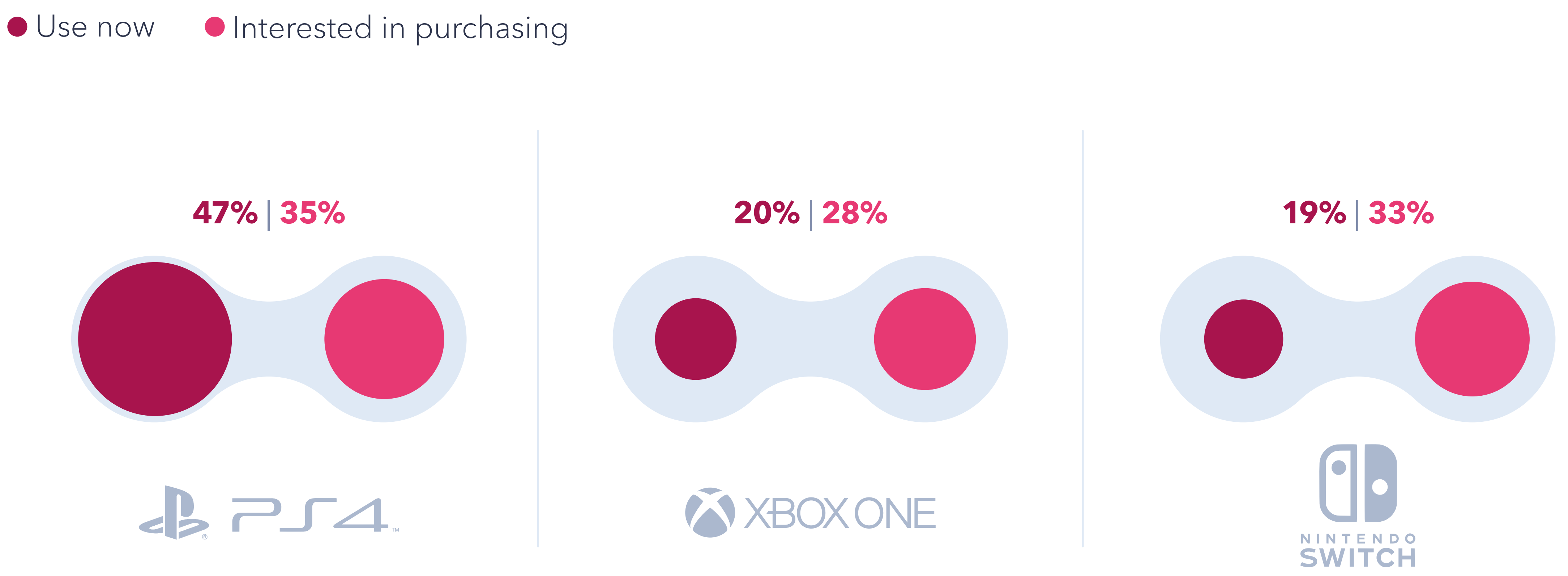
Currently, the PS4 is the most commonly owned gaming console – just under half of console owners own the system and 35% are interested in purchasing one. Meanwhile its primary competitor, the Xbox One, sees overall ownership drop to just over 1 in 5 of this audience, whilst little under 3 in 10 are interested in purchasing the console.

Nintendo on the other hand, has long seen engagement from an audience of loyal fans spanning a near 40 year history. Though only 1 in 5 console owners currently own a Nintendo Switch, 1 in 3 are interested in purchasing one, driven by those aged 16-24, who are 45% more likely to show interest.

Just under 1 in 5 gamers purchased a games console in the last 3-6 months

CURRENT GENERATION CONSOLES

% of console owners who currently use/are interested in purchasing the following console brands

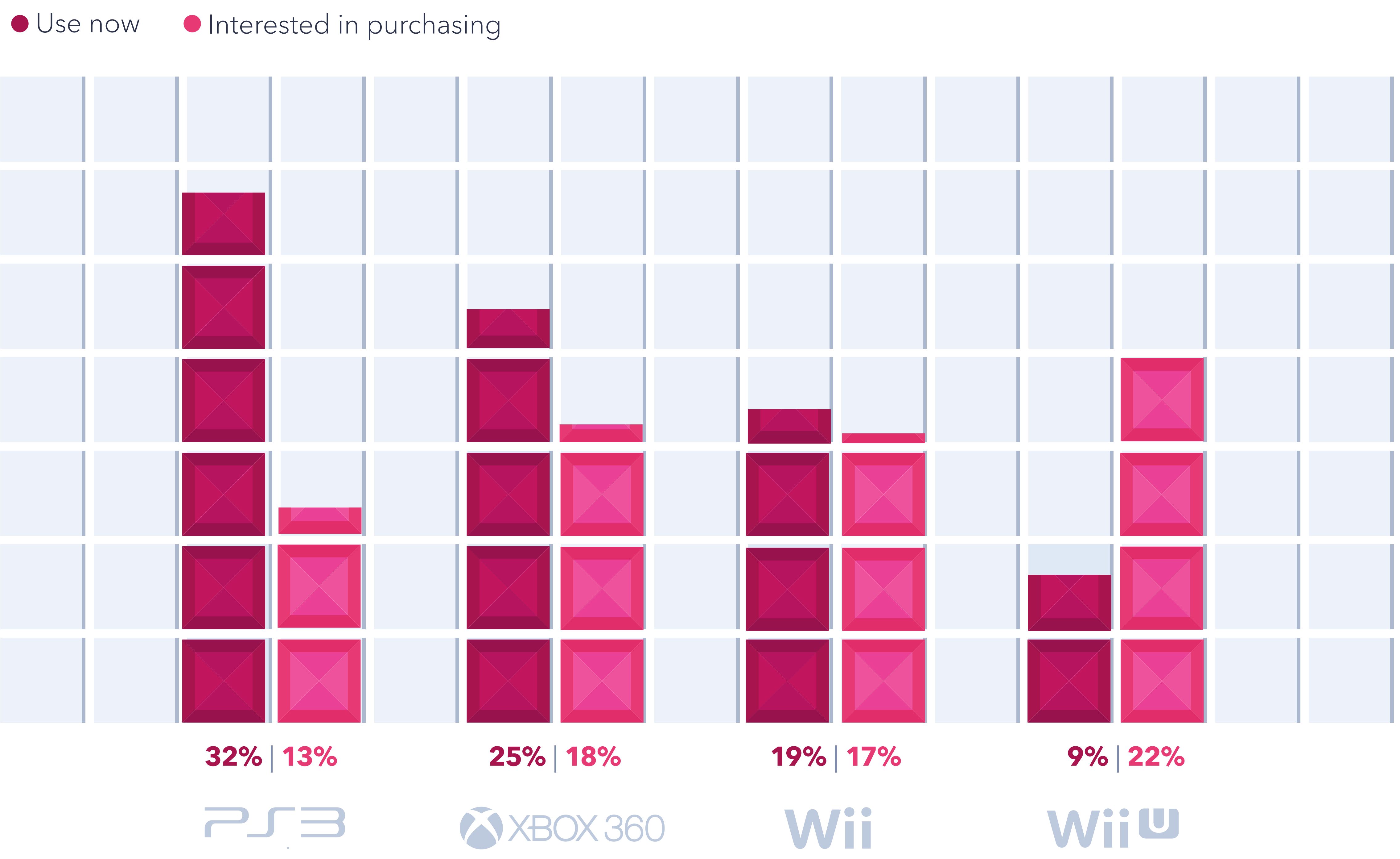


Question: Which of these devices do you use for gaming? Which would you be interested in purchasing? **Source:** GlobalWebIndex Q3 2019 **Base:** 8,827 Console owning gamers aged 16-64

Retro gaming

RETRO CONSOLE OWNERSHIP

% of console owners who currently use/are interested in purchasing the following console brands



Interestingly, 7th generation consoles like the Wii, Xbox 360 and PS3, despite debuting as far back as 2006, are still seeing fairly high usage and purchase interest.

A primary reason for the continued use of these devices may be the wide library of now "classic" franchises available. Also, with increasingly expensive cost prices on newer consoles, users are likely inclined to show interest in these older consoles for an affordable, "retro" gaming experience.

Naturally, ownership of older consoles is more common among older gamers, but there are examples where younger gaming audiences still use these past devices. **The Playstation 3 and Xbox 360 are both popular with 16-24s in this audience, with over 1 in 4 saying they still use the devices, more so than every retro Nintendo system we track.**

Additionally, the Xbox 360 displays a rare example where a former-generation console actually shows higher current use than its successor, by 5 percentage-points while a further 18% of console-owners still show an interest in purchasing the device. Perhaps even more unexpected is the PS3's current use, surpassing both of Microsoft's Xbox models entirely.

Question: Which of these devices do you use for gaming? Which would you be interested in purchasing? **Source:** GlobalWebIndex Q3 2019 **Base:** 8,827 Console owning gamers aged 16-64

• TREND IN ACTION •

Gaming nostalgia

For those who grew up on classic gaming consoles, having the chance to experience this nostalgia again is a trend that's vital to gaming.

In our **Trends 2020** report, we found that 8 in 10 internet users in the UK and U.S. say they experience feelings of nostalgia at least occasionally, while 4 in 10 say they do so often. Brought about by a number of things, a song is the most commonly cited cause but video games can also have this sentimental effect.

In total, 16% of UK and U.S. internet users say they felt nostalgic about a console game in the past year. With releases of remastered classics on modern consoles receiving positive feedback, this trend is only set to continue. The production of **retro consoles** that come preloaded with a classic library of games ready to play is also driving this trend.

02

The world of gaming

The modern gamer

Esports fans

With the migration of gaming activities online, a whole host of behaviors fall within the confines of gaming, even those that don't involve picking up a controller and playing a game. **Over 1 in 5 internet users say they are interested in esports, rising to 4 in 10 for gamers.** For some time now, there's been a substantial market here, which was reflected in the near $1bn price tag **Amazon paid** for video game-streaming site Twitch back in 2014.

Male gamers are more likely to have watched both live streams and tournaments in the past month compared to female gamers in this audience; but they're almost equally as likely to broadcast their own gameplay.

While streaming sites, such as Twitch or YouTube, have long given gamers access to live broadcasts from creators and professionals, this functionality now lies at the heart of many games themselves. For example, **Overwatch** added their esports tournament to the game's home page, meaning players can simply drop in to watch professional gamers live. Playstation 4 owners, by using the "share" function readily installed into the console, can begin streaming their content at the press of a button, without purchasing the necessary equipment. And they've certainly made use of it, with

GENDER

% of male/female gamers who have done the following in the last month

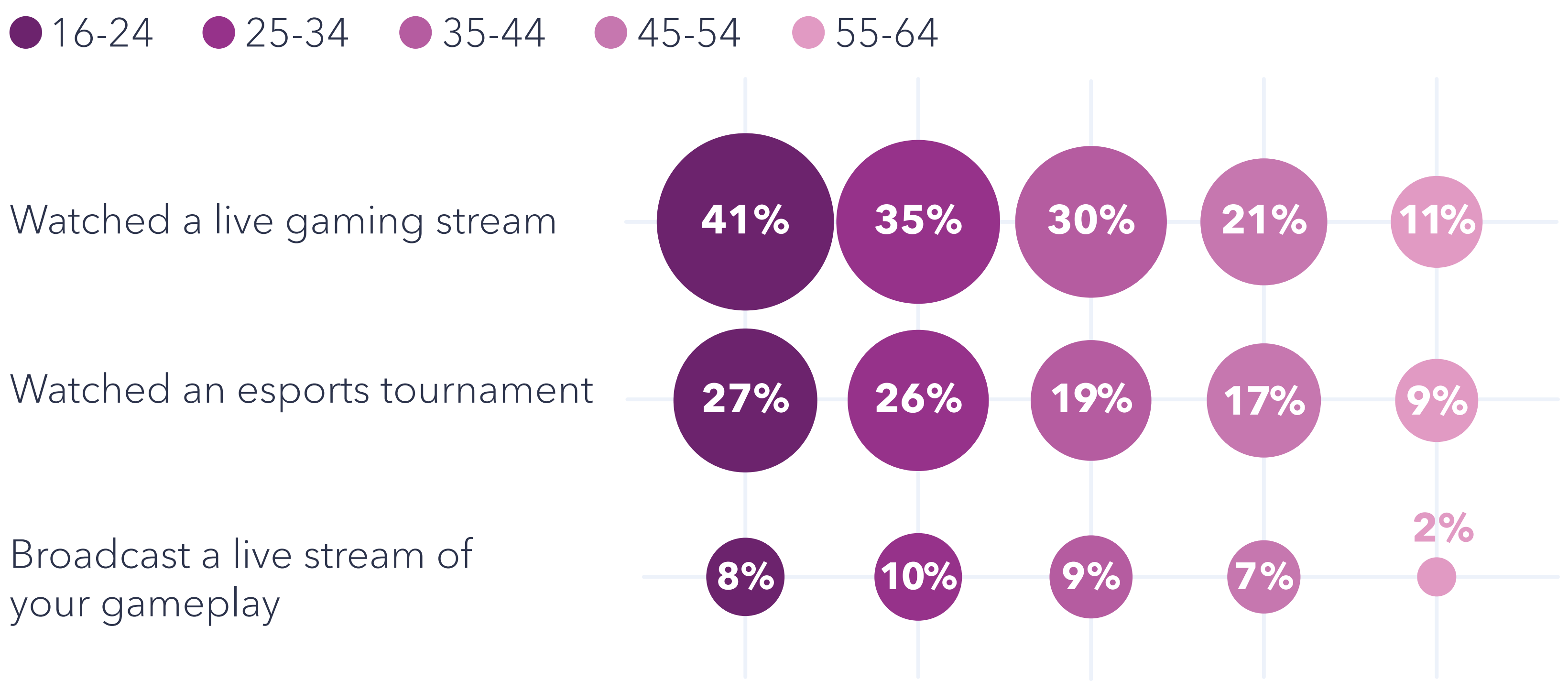
	Male	Female
Watched a live gaming stream	37%	30%
Watched an esports tournament	27%	17%
Broadcast a live stream of your gameplay	9%	8%

1 in 4 Playstation owners sharing an image/video of their gameplay online in the last month, 1.3x as likely as the average gamer.

The individuals at the forefront of esports, dubbed **"E-Athletes", make for influential celebrities in their own right**. Personalities like Tyler Blevins, or "Ninja" to his followers, accumulated 22 million subscribers on his YouTube channel in 2019, and recently signed with **Adidas** as a brand ambassador. These stars make for crucial touchpoints in the purchase journey for esports fans – those who are interested in esports and also watched a live gaming stream in the past month. Nearly half in this audience follow sports stars on social media, and are 2.1x more likely to discover brands through celebrity endorsements than other internet users.

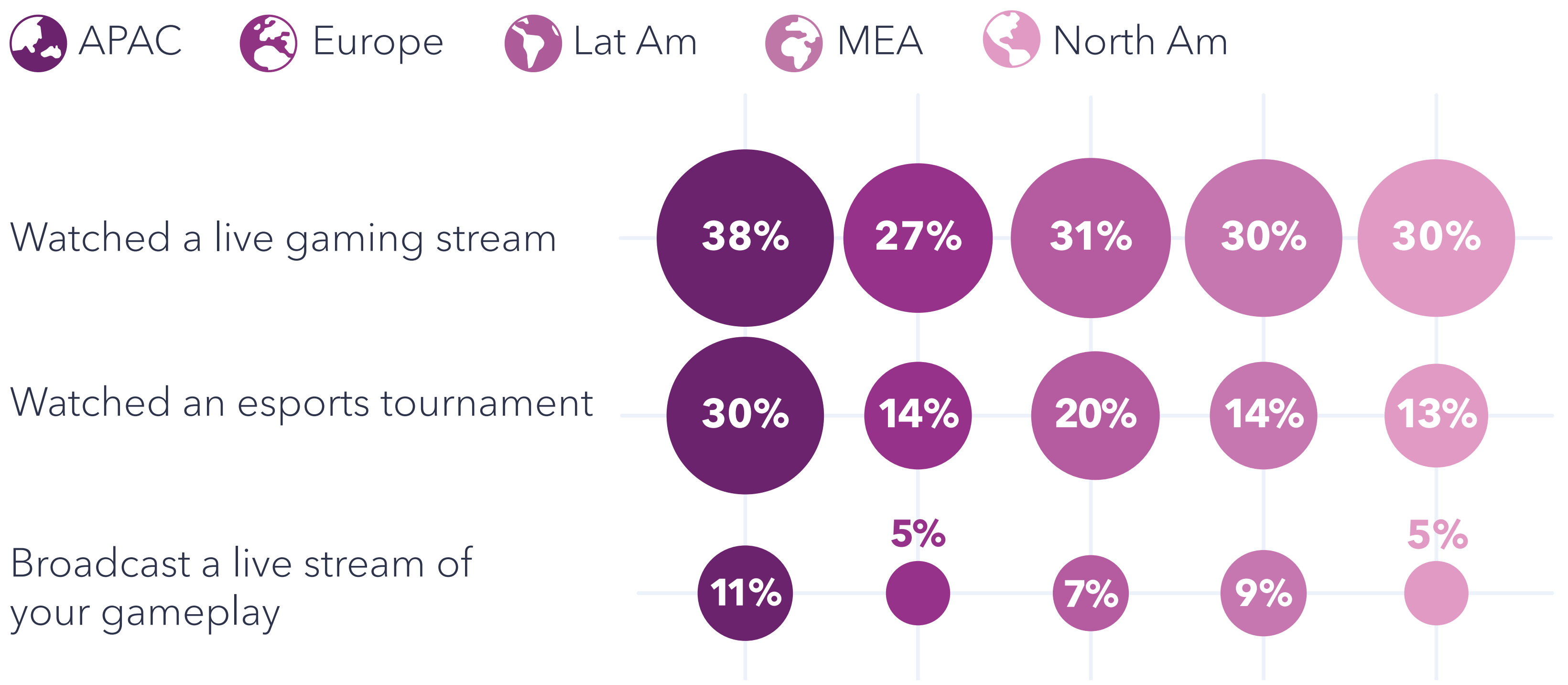
AGE

% of internet users who have done the following in the last month



REGION

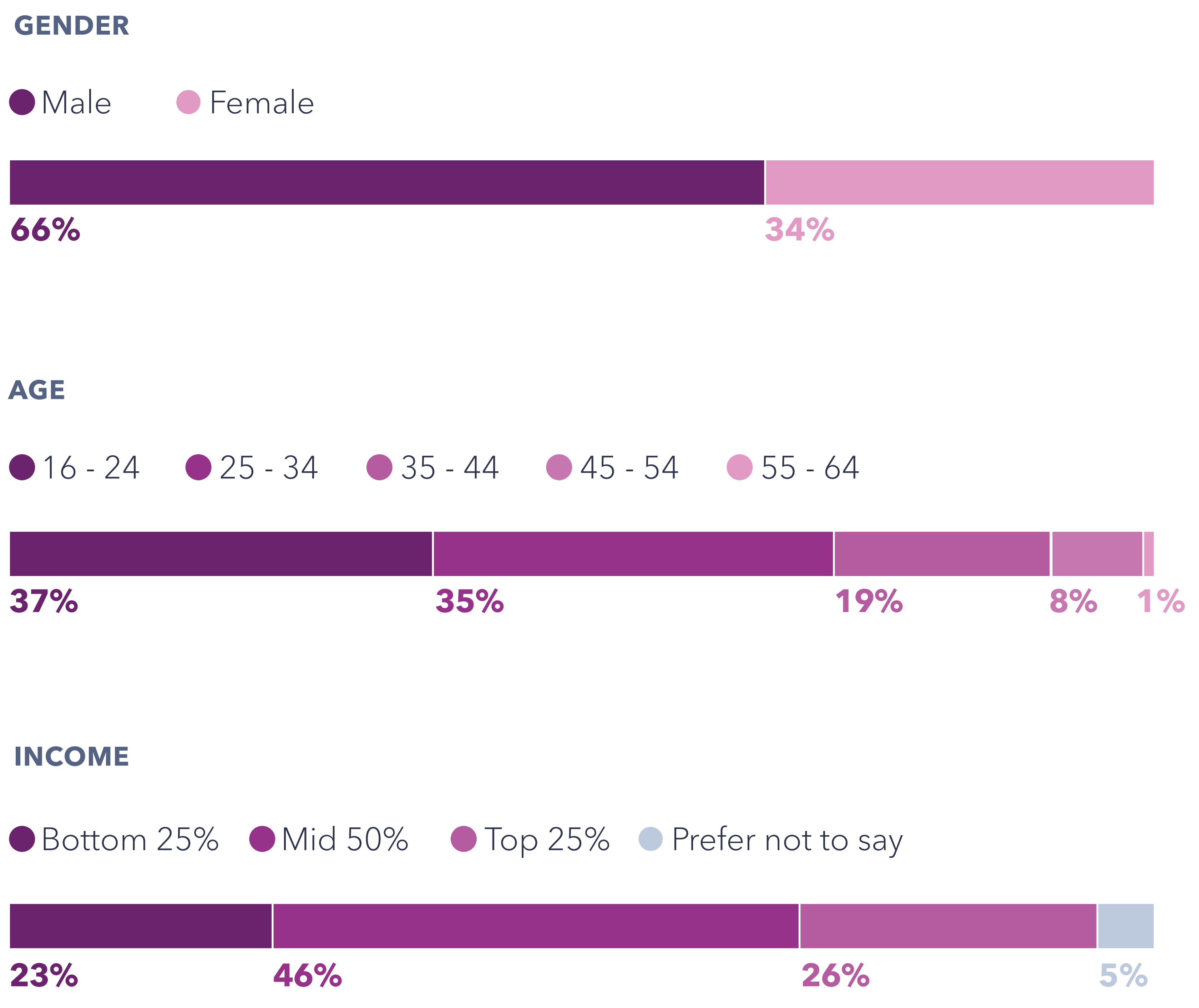
% of internet users who have done the following in the last month



Question: Thinking about gaming, which of these things have you done in the last month?
Source: GlobalWebIndex Q3 2019?
Base: 23,057 gamers and 120,303 internet users aged 16 -64

Cloud gaming

% of cloud gamers who are



Half of cloud gamers paid for a movie/TV streaming service in the last month, 1.4x as likely as the average gamer

As mentioned previously, purchasing a physical copy of a game has fallen behind buying the digital version, a statistic driven by gaming marketplaces on services such as Xbox Live or PSN Marketplace. But with game install sizes ballooning at an alarming rate, long installation times make streaming a tempting alternative for gamers.

The introduction of "cloud gaming", a subscription-based service that offers a gaming library similar to video-streaming services such as Netflix or Amazon Prime, may bypass this flaw in traditional gaming methods. **The service, though in its infancy, was used by 16% of gamers in the past month**. Note that cloud gaming offers access to a vast historical library of titles, and gamers are likely to be playing classic titles here just as often as they are recent ones.

"Cloud gamers", those that played a game via a cloud gaming service in the last month, are driving the innovative future of gaming. They're predominantly skewed towards male gamers, dropping off among those aged 45-64. **Given the rolling costs of cloud gaming, they're more likely to be among the top 25% of earners in their demographic, 1.4x the average gamer.** Cloud gamers also tend to demonstrate an awareness of their higher income; they are 1.3x as likely as the average gamer to consider themselves to be much more affluent than the typical person.

Alongside this, their most distinctive attitudes reveal an audience keen to interact with other like-minded individuals. **Evidenced by the half of cloud gamers that say they would buy a product/service simply to be part of the community surrounding it (Index 1.33)**. This demonstrates their tendency to follow trends, observed also from their intent to keep up with the latest in technology (Index 1.20) and fashion (Index 1.23).

Cloud gaming certainly has the potential to be successful, reshaping the gaming industry through cross-device functionality. Sony's **Playstation Now** service has been growing for over 5 years, and with the introduction of Google's **"Stadia"**, a console that solely functions around downloading from a cloud service, this is an opportunity for gamers to trial the future of gaming. Equally important is how cloud gaming outsources processing power to remote servers. **This effectively levels the playfield across different platforms, defying the need for competitive devices that fought to outperform the opposition in terms of hardware specifications.**

Question: Thinking about gaming, which of these things have you done in the last month?
Source: Globalwebindex Q3 2019 **Base:** 3,342 cloud gamers aged 16-64

Social gaming

Despite global engagement with gaming across disparate audiences, the core functionality of gaming as a social, localized activity has been blurred by the move to large-scale, online multiplayer games. While some choose to enjoy an anonymous experience with random individuals across the globe, there are those that actively utilize multiplayer games to socialize with their friends, whilst meeting new ones in the process.

Accounting for 28% of internet users, social gamers are defined as gamers who use the internet to meet new people and played a game online with their real-life friends/shared their gameplay online at least once in the last year.

Twitch provides a cozy hangout for social gamers outside of China, with 1 in 3 visiting/using the platform monthly, against 25% of all gamers and only 15% of internet users. Such an example of the platform's social influence was the 2014 **phenomenon** "Twitch Plays Pokemon." Attracting an all-time high of **over 1 million** active participants, users vied for control of the protagonist through a chat window, as they navigated the 1998 GameBoy classic "Pokemon Red". More recently, gamers have come together through in-game events, such as Fortnite's Star Wars **event**, watched live by over 3 million viewers.

Social gamers make for dedicated esports fans and contributors; they are 1.6x as likely to watch an esports tournament and 1.8x as likely to broadcast a live stream of their gameplay in the last month as the average gamer. Their social qualities are further reflected in their brand attitudes; **1 in 3 social gamers say they want brands to run customer communities/ forums** and they are 1.4x as likely to advocate a product that is relevant to their friend's interests.

45% of gamers played a game online with their real friends in the last month

TWITCH

% of social gamers and internet users who visit/use Twitch each month, outside of China

● Social gamers ● All internet users

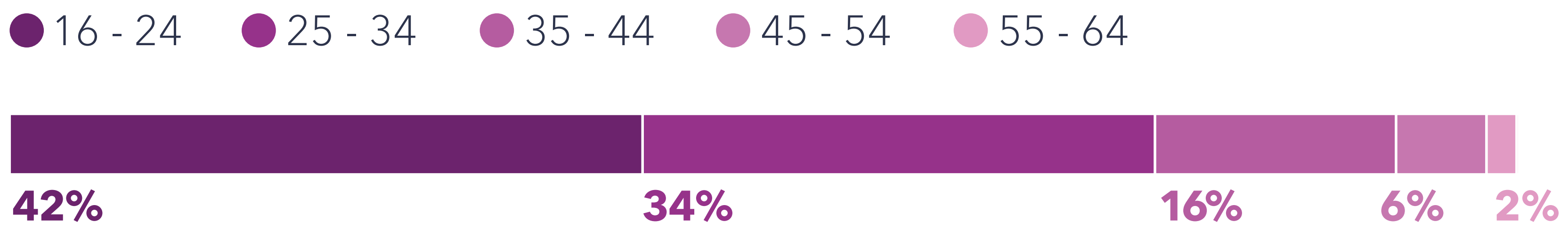
twitch **38%** 15%

GENDER

% of social gamers who are

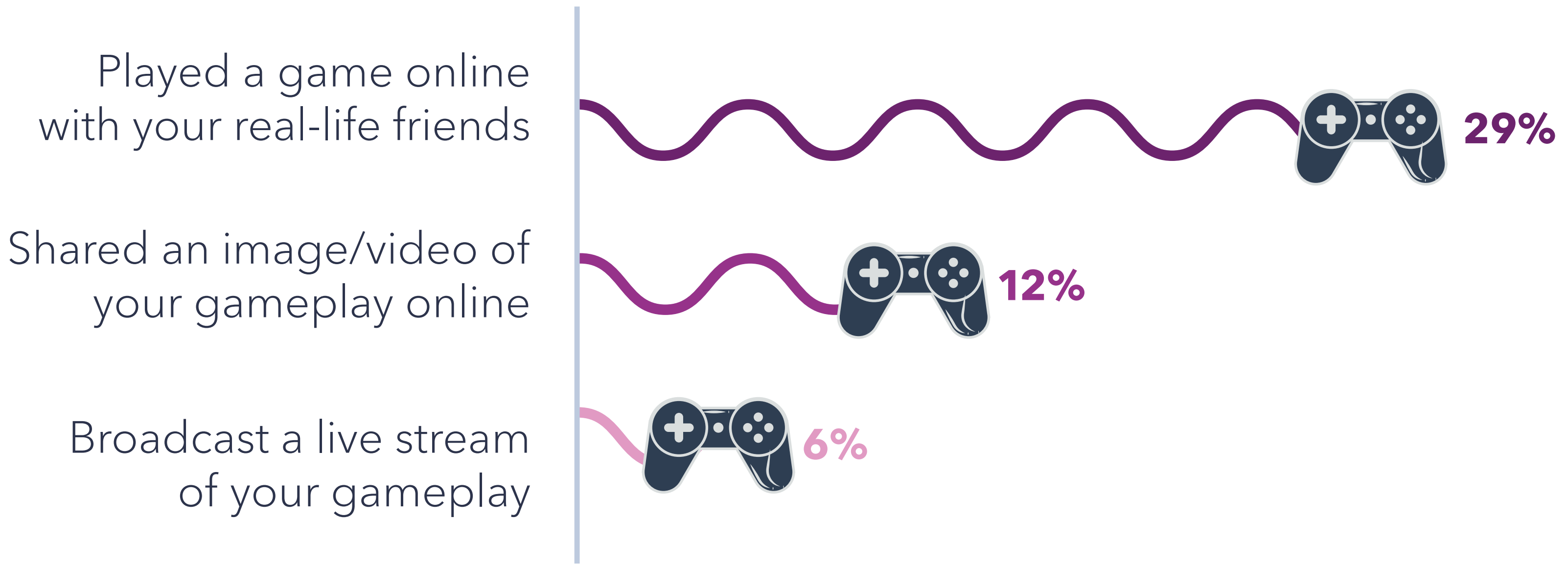
AGE

% of social gamers who are



SOCIAL GAMING ACTIVITIES

% of gamers who have done following gaming activities in the last month



Question: Which of the following sites / applications have you visited or used in the past month via your PC / Laptop, Mobile or Tablet? | Thinking about gaming, which of these things have you done in the last month? **Source:** GlobalWebIndex Q3 2019 **Base:** 5,251 social gamers and 120,303 internet users aged 16-64

Social frustrations & gaming motivations

Online multiplayer games are increasingly resembling a new form of a social network. They typically encourage interaction between players – some are even implementing the feature as essential, championing the emphasis of sharing content with your friends. Collaboration with other players may be a prerequisite for making progress in a game, or a game may be based on competition between players.

At the same time, the question remains as to whether traditional social media platforms are truly connecting people, **given the third most common frustration with social media in the UK and U.S. is the lack of actual human connection**. In addition, the anonymity of such services can pave way for bullying or discriminatory behavior; a common grievance for gamers.

Games, on the other hand, are valued for their authenticity and openness. **While the dominant reason to play games is to relieve boredom (61%), the next most important reason is to have fun with people they know (38%)**, coming ahead of skill progression, competition, and even game immersion.

SOCIAL FRUSTRATIONS AND GAMING MOTIVATIONS

% who say the following are why they are frustrated with social media and why they play games

Frustrations with Social Media

Bullying, discriminatory or hateful behavior	32%
The number of ads I see	30%
The lack of actual human connection	30%
I'm concerned over who can see my profile/social activities	27%
It portrays an unrealistic self-image	27%
I spend too much time on social media	24%
The overload of information and content	23%
It's always the same experience whenever I log in	17%
It doesn't appeal to my interests	12%
It gives me FOMO (fear of missing out)	11%
It doesn't allow me to bond properly with my friends	11%

Gaming Motivations

To relieve boredom	61%
To have fun with people I know	38%
To progress my skills	37%
To enjoy the competitive nature of gaming	36%
To feel immersed in the game	34%
To challenge myself against others	33%
To overcome challenges and feel accomplishments	31%
As it allows me to be myself	26%
To chat/keep up with friends	22%
To share moments/experiences with other gamers	21%
To build my in-game status/reputation	20%

Question: What are your biggest frustrations with using social media (e.g. Facebook, Instagram, Snapchat, etc.)? | Which of the below best describes why you play games?
Source: GlobalWebIndex September 2019
Base: 4,829 internet users and 2,410 gamers in the U.S. and UK aged 16-64

03

The world of gaming

Names in gaming

Gaming genres

FAN GENRE OVERLAP

% of fans who have engaged with another genre in the last 12 months

Global fans												
46%	Action Adventure/ Open World		49%	50%	47%	53%	50%	62%	80%	54%	54%	55%
39%	Action/Platform	79%		55%	49%	54%	64%	66%	79%	57%	56%	56%
29%	Fighting	81%	54%		51%	58%	56%	71%	85%	58%	63%	60%
28%	MMO*	78%	50%	53%		70%	50%	65%	86%	58%	56%	65%
32%	MOBA*	75%	48%	52%	60%		48%	63%	85%	56%	55%	63%
34%	Puzzle platform	68%	54%	48%	41%	46%		59%	68%	53%	49%	50%
38%	Racing	76%	50%	54%	48%	54%	52%		80%	56%	60%	55%
49%	Shooter	75%	46%	50%	48%	56%	46%	62%		51%	53%	55%
33%	Simulation	75%	49%	50%	49%	55%	54%	64%	76%		56%	58%
33%	Sports	76%	48%	55%	47%	54%	50%	69%	80%	57%		57%
33%	Strategy/RTS	78%	49%	53%	55%	62%	52%	64%	83%	58%	57%	

- 70%+
- 50%-69%
- 0-49%

* Massively multiplayer online

* Multiplayer online battle arena

How to read:
Looking down a column shows how much that column franchise overlaps with the corresponding row. Looking across shows how much that row franchise is also a fan of the corresponding column. E.g. 70% of MOBA fans are also fans of MMO, but only 60% of MMO fans fall into the MOBA fan category

Gaming franchises

FAN FRANCHISE OVERLAP

% of fans who have engaged with another genre in the last 12 months

Global fans		Call of Duty	Counter Strike	FIFA	Grand Theft Auto	League of Legends	Super Mario	Minecraft	Need for Speed	Plants vs Zombies	PUBG
16%	Call of Duty		36%	41%	42%	32%	32%	33%	42%	32%	31%
13%	Counter Strike	44%		36%	40%	40%	30%	35%	44%	39%	40%
18%	FIFA	36%	26%		32%	25%	34%	26%	34%	25%	21%
15%	Grand Theft Auto	47%	36%	40%		29%	32%	34%	45%	32%	32%
16%	League of Legends	33%	34%	29%	27%		30%	36%	33%	39%	43%
17%	Super Mario	30%	23%	36%	27%	27%		32%	31%	34%	22%
15%	Minecraft	36%	31%	31%	34%	37%	36%		32%	38%	33%
16%	Need for Speed	43%	36%	38%	41%	32%	33%	30%		36%	33%
17%	Plants vs Zombies	30%	30%	27%	27%	36%	34%	34%	34%		31%
15%	PUBG	35%	36%	26%	32%	46%	25%	33%	36%	36%	

- 40% +
- 30%-39%
- 0-29%

How to read: looking down a column shows how much that column franchise overlaps with the corresponding row. Looking across shows how much that row franchise is also a fan of the corresponding column. E.g. 40% of Grand Theft Auto fans are also fans of Counter Strike, but only 36% of Counter Strike fans fall into the Grand Theft Auto fan category

The battle royale family

After the success of 2018's Fortnite, the Battle Royale genre quickly became a "must-have" feature in upcoming releases.

Currently, the titles with the largest player base are *Fortnite*, *Player Unknown's Battlegrounds (PUBG) and Apex legends* – each sees worldwide popularity, but Fortnite has risen above the competition in all world regions.

Fortnite's large following is closely tied to its relationship with other popular franchises that are promoted through in-game events. ***Fortnite* fans are 1.2x as likely as the average gamer to buy a product simply because of the experience of the community around it,** enjoying such franchise tie-ins as the **Avengers event** where players who logged into the game over a specific period could take part in a Marvel-themed game mode – a franchise enjoyed by over two-thirds of *Fortnite* fans.

Availability on multiple devices not only appeals to more types of gamers but contributes greatly to their continued success and advertising opportunity. **Over 2 in 3 *Apex* and *Fortnite* fans say they use a games console to play games,** compared to 57% of PUBG fans. **Instead, *PUBG* fans (the majority of which are found in the APAC region) prefer to game on PCs/ laptops (83%) and smartphones (91%)** where these devices see the high engagement.

Though these games are completely free to download and play, they generate revenue primarily from in-game currency, allowing players to purchase in-game cosmetic items for their player avatar. This system appeals to Battle Royale players, with **1 in 3 Apex fans having purchased a game add-on or DLC in the last month**, while *Fortnite* and *PUBG* fans trail closely behind at 1 in 4 and 3 in 10, respectively.

REGION

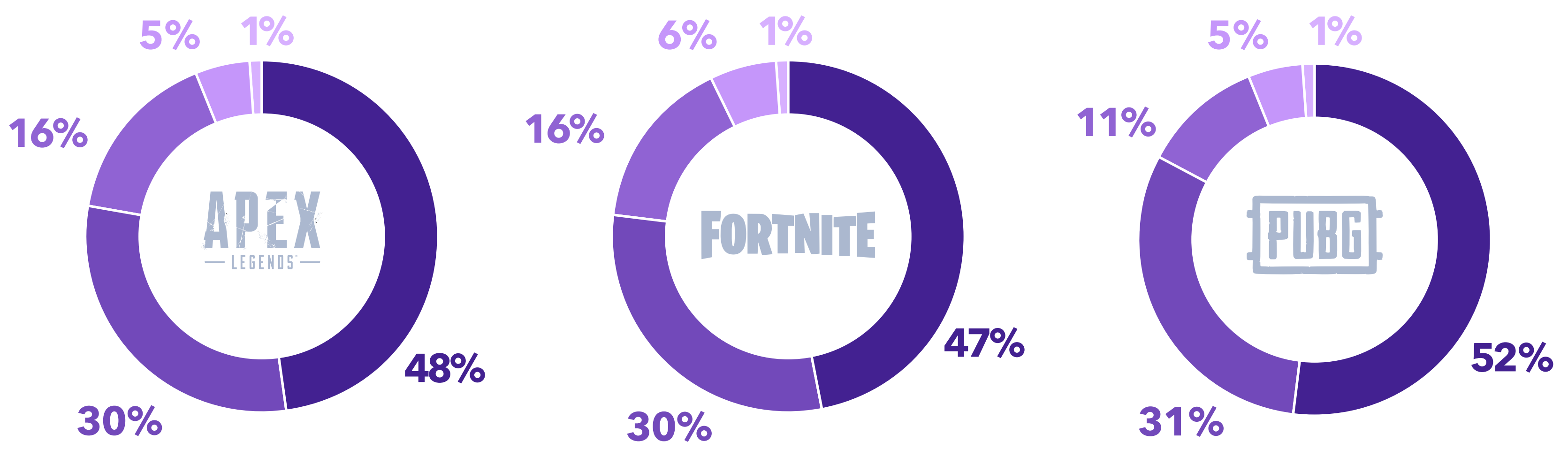
% of internet users in each region who are Apex/Fortnite/PUBG Fans

	APEX LEGENDS	FORTNITE	PUBG
APAC	10%	16%	17%
Europe	9%	19%	32%
Lat Am	10%	32%	10%
MEA	8%	23%	7%
North Am	13%	24%	9%

AGE

% of Apex/Fortnite/PUBG fans who are...

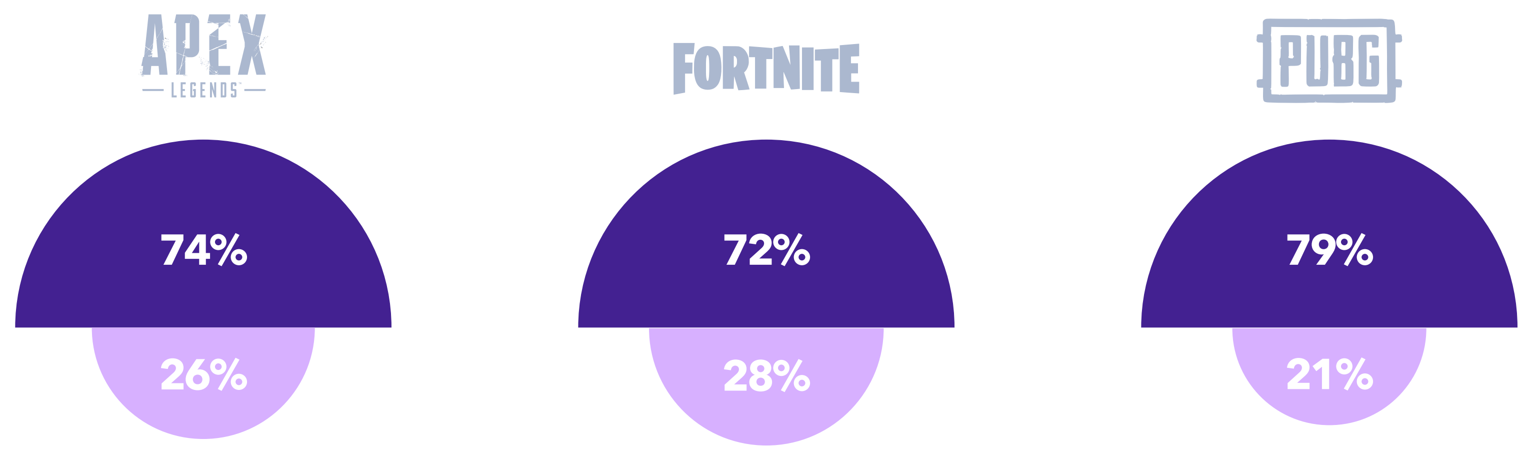
16-24 25-34 35-44 45-54 55-64



GENDER

% of Apex/Fortnite/PUBG fans who are...

Male Female



Question: Which of these gaming genres have you played in the last 12 months? **Source:** GlobalWebIndex Q3 2019 **Base:** 2,115 Apex Legend's fans, 4,697 Fortnite fans and 3,086 PUBG fans aged 16-64 fans aged 16-64

Notes on methodology

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

OUR RESEARCH

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

OUR QUOTAS

To ensure that **our research is reflective of the online population in each market**, we set appropriate **quotas on age, gender, and education** – meaning that we interview representative numbers of men vs women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education.
To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources.

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

GLOBALWEBINDEX SAMPLE SIZE BY MARKET

This report draws insights from GlobalWebIndex's Q3 2019 wave of research across 46 countries, with a global sample of 145,271 respondents.

Argentina	**1,544**	Morocco	**983**
Australia	**4,036**	Netherlands	**1,329**
Austria	**1,282**	New Zealand	**1,297**
Belgium	**1,277**	Nigeria	**1,009**
Brazil	**2,320**	Philippines	**1,618**
Canada	**2,288**	Poland	**1,856**
China	**15,320**	Portugal	**1,270**
Colombia	**1,343**	Romania	**1,304**
Denmark	**1275**	Russia	**3,488**
Egypt	**1,852**	Saudi Arabia	**1,523**
France	**5,113**	Singapore	**2,730**
Germany	**5,093**	South Africa	**1,528**
Ghana	**973**	South Korea	**1,287**
Hong Kong	**1,821**	Spain	**5,068**
India	**7,673**	Sweden	**1,304**
Indonesia	**1,882**	Switzerland	**1,282**
Ireland	**1,266**	Taiwan	**2,277**
Israel	**1,286**	Thailand	**2,989**
Italy	**5,151**	Turkey	**2,033**
Japan	**1,822**	UAE	**1,784**
Kenya	**1,028**	UK	**10,115**
Malaysia	**1,540**	USA	**24,813**
Mexico	**2,633**	Vietnam	**2,566**

Notes on methodology

ACROSS GLOBALWEBINDEX'S MARKETS

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

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

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

GLOBALWEBINDEX VERSUS ITU FIGURES

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

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

MOBILE SURVEY RESPONDENTS

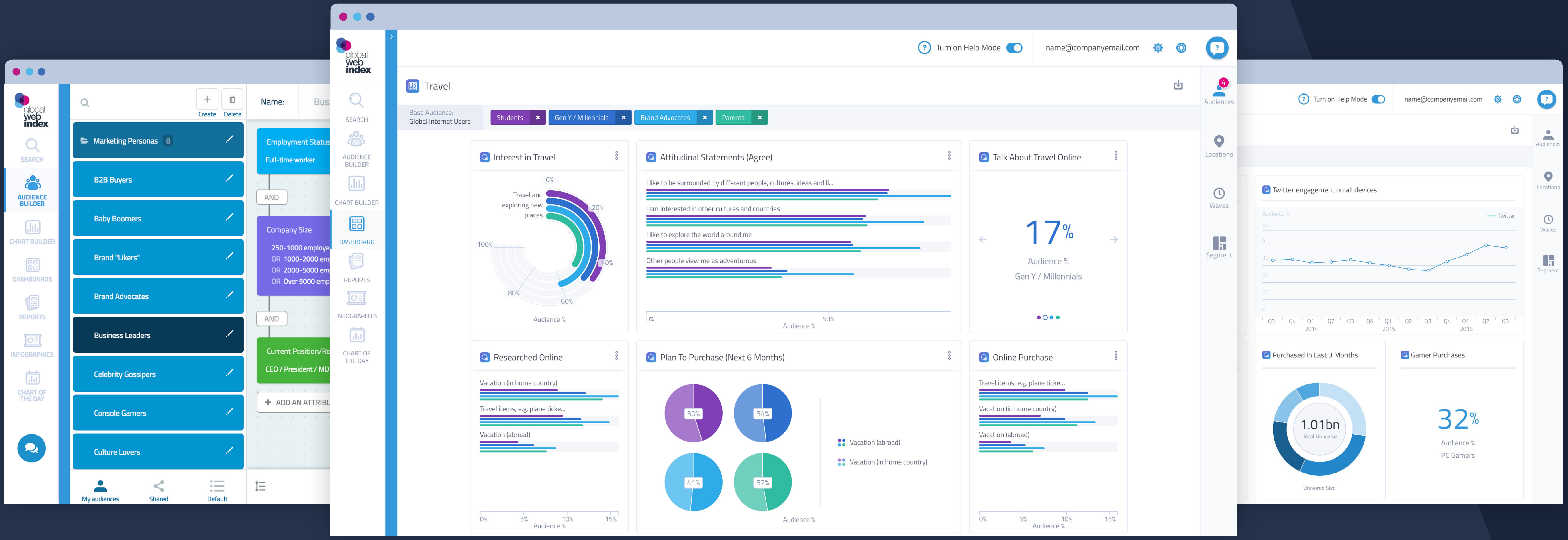
From Q1 2017 on, GlobalWebIndex has offered our Core survey on mobile. This allows us to survey internet users who prefer using a mobile or are mobile-only (who use a mobile to get online but do not use or own any other device). Mobile respondents complete a shorter version of our Core survey, answering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

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

INTERNET PENETRATION RATES

Table below refers to the total population in each market

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



Get more from your data

Run your own custom studies using our panel of 22 million consumers, and get instant access to insight tailored to your business needs.

Request custom research

Jason Mander
Chief Research Officer

Thomas Morris
Junior Insights Analyst & Writer

Chase Buckle
Trends Manager

jason@globalwebindex.com

tmorris@globalwebindex.com

chase@globalwebindex.com

www.globalwebindex.com