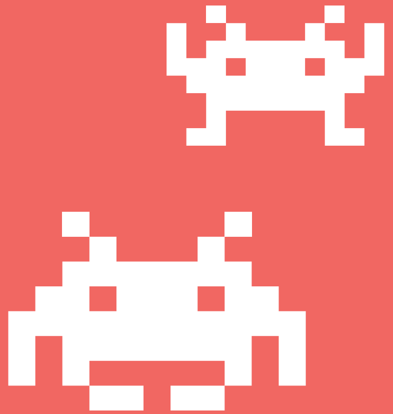
Ipsos Connect

THE NEW FACES OF GAMING

Thought Piece
2017



IF I ASK YOU TO PICTURE A GAMER, WHAT DO YOU SEE?

Most people will imagine a man, in his 20s, using a games console or computer. It's fair to say that the image exists for a reason – this 'classic' gaming demographic group is still a key chunk of the market and shows no sign of losing interest in the medium. However, gaming in 2016 is broad and complex; a 'typical' gamer may not exist.

THE NEW FACES OF GAMING

One striking observation that GameTrack (ISFE & Ipsos Connect) survey has uncovered in the European market (UK, Germany, France and Spain) is the rise in gaming among older generations. In Q3 of 2012, 36% of 35-44 year olds reported that they play some kind of games, rising to 46% in Q3 2016. Similarly, for 45-64s, the reach of gaming has increased from 21% to 27% in the same timeframe.

Looking around during my commute makes it pretty clear what platform is driving the growth in gaming. Most people are on their smartphones and quite a few of them are playing games such as Candy Crush or Pokemon Go. The smartphone has made gaming more accessible and desirable for a wider age group than ever before. Of those aged 35 or over, 8% reported playing games on smartphones or tablets in Q3 2012, doubling to 16% in Q3 2016. As ownership of these devices increases, so does playing games.

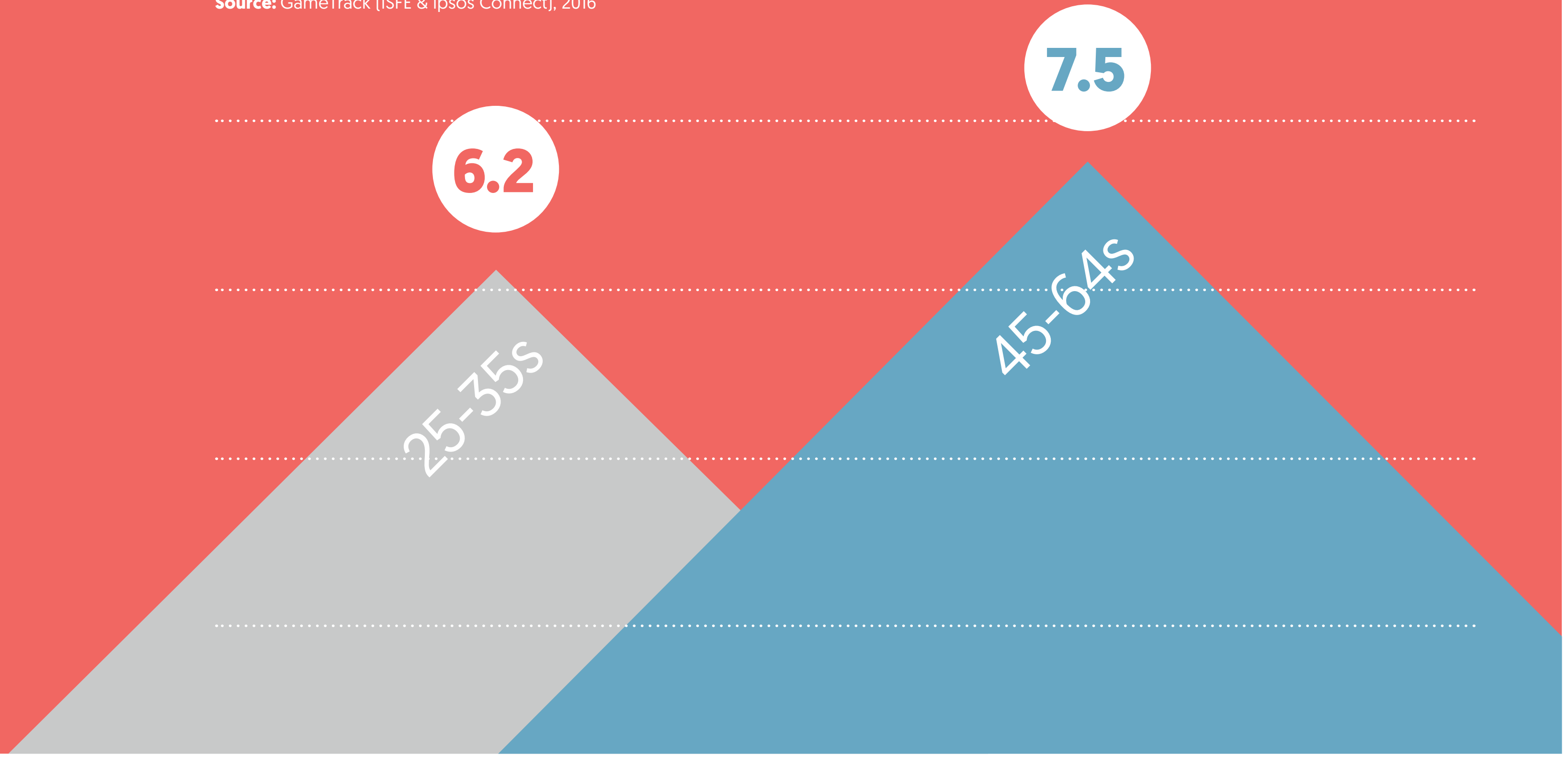
Although app gaming on smartphones and tablets is key in driving reach among older groups, it reflects a trend that spans all generations. The proportion of 6-64 year olds gaming on smartphones and tablets rose from 18% in Q3 2012 to 27% in Q3 2016.

You can definitely argue that the individual incidences of people playing games on smart devices is short, but - similar to the snacking behaviour that has snuck into our everyday content consumption - the time adds up, especially for those you might consider "non traditional gamers". In Q3 2016, 45-64 year-old gamers report playing for 7.5 hours per week on average across any device, more time than 25-34 year-old gamers who play for 6.2 hours per week.

AVERAGE HOURS SPENT PLAYING GAMES ACROSS ANY DEVICE PER WEEK

(AMONGST THOSE PLAYING)

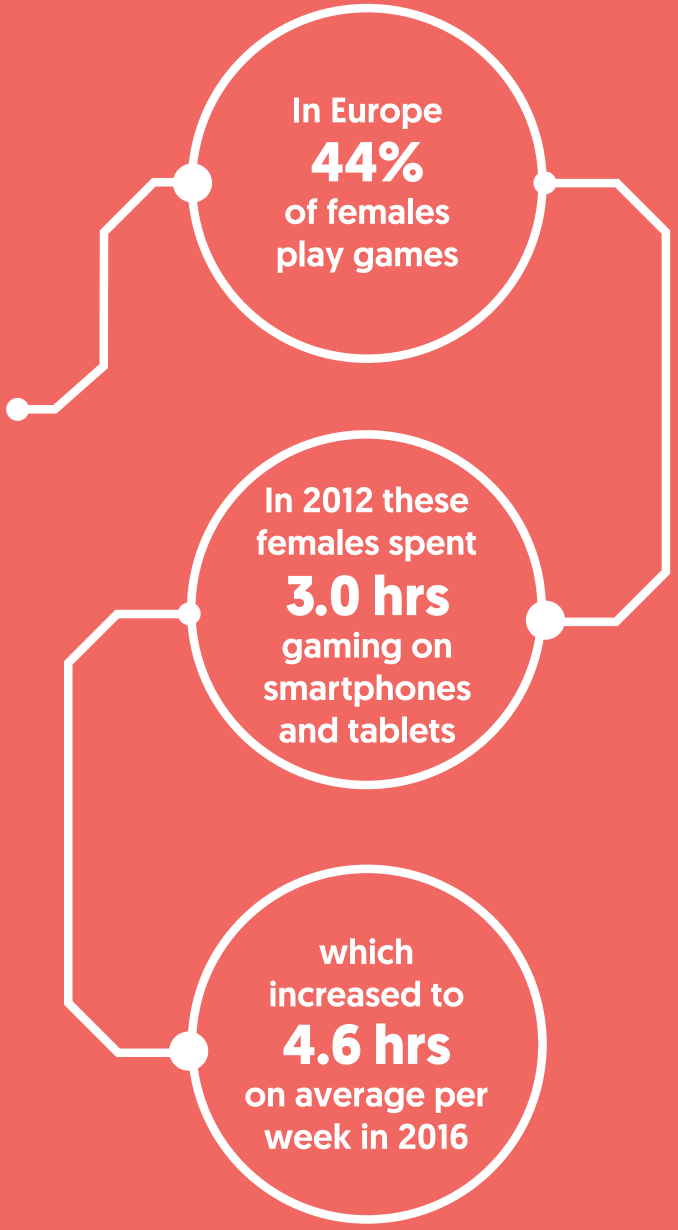
Source: GameTrack (ISFE & Ipsos Connect), 2016



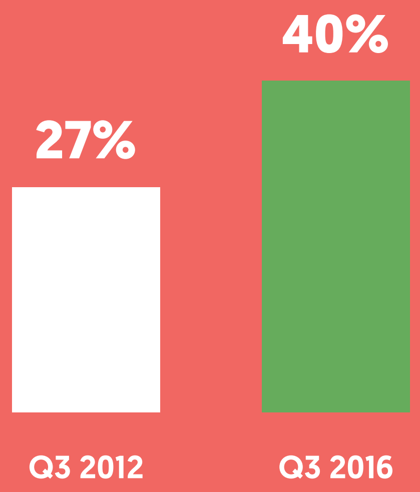
The story is similar for women. It is not new news that women are interested in gaming, from Carol Shaw, one of the first women working as a game designer, to Sasha "Scarlett" Hostyn the current highest earning female pro gamer [http://www.esportsearnings.com/players/female-players], women have always taken an interest in gaming. In Europe 44% play games in Q3 2016, a figure that's remained consistent since 2012. But smart devices represent a growing area for female gamers. The gaming time of women on smartphone and tablets has increased from 3.0 hours per week on average [Q3 2012] to 4.6 hours per week [Q3 2016] - amongst those playing on these devices. An increase in their gaming time is key, since this will be likely to equate to more spending.

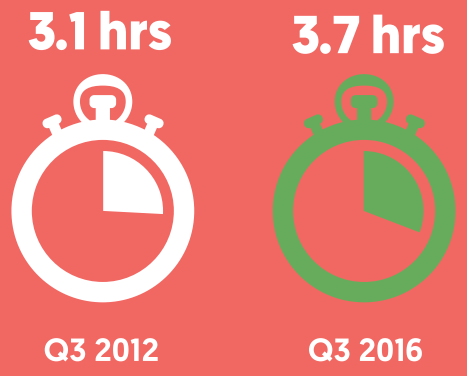
But games companies should also not ignore changes in what could be considered their core audience; between Q3 2012 and Q3 2016 the proportion of 18-24 year-old men gaming on smartphones and tablets grew from 27% to 40%. The amount of time they spend playing on these devices has also increased from 3.1 hours per week [Q3 2012] to 3.7 hours [Q3 2016].

Indeed, increasing engagement is potentially the key battle for the games industry when it comes to younger people. Around three quarters of 6-24 year olds reported playing games of some kind in Q3 2016, so there is limited scope to introduce new players.



PROPORTION OF 18-24 YEAR-OLD MALES GAMING ON TABLETS OR SMARTPHONES





TIME SPENT GAMING ON TABLETS OR SMARTPHONES

AMONGST 18-24 YEAR-OLD MALES WHO PLAY GAMES ON THESE DEVICES

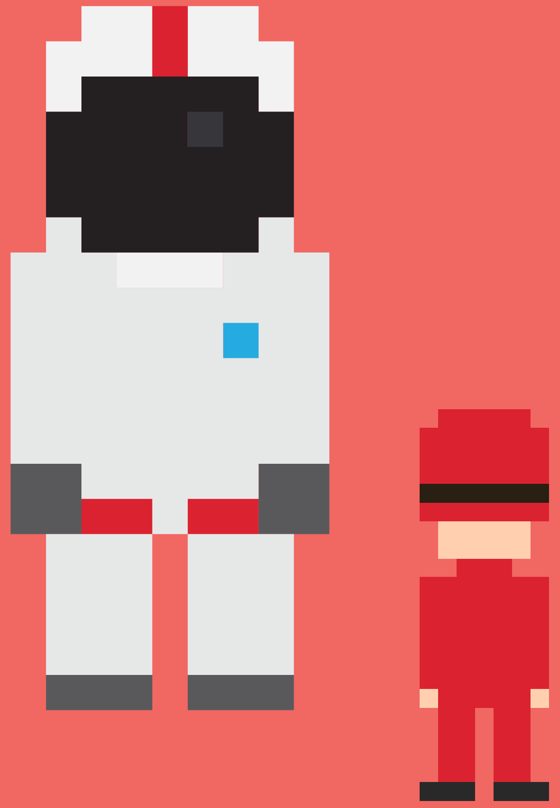
Source: GameTrack [ISFE & Ipsos Connect]

Instead, they can be encouraged to play for longer and spend more money by offering great experiences across all devices, so that being away from a console is not a barrier to gaming.

Smartphones and tablets aren't replacing traditional gaming devices though. The proportion of 18-24 year-old men playing games on consoles or PCs has remained stable between 2012 and 2016, at around 71%, and average playing time across these devices is also consistent [around 10 hours per week on consoles and computers amongst those who use them for gaming]. Instead, engagement through smartphones and tablets has built on the latent interest in gaming; mobile devices offer another means for already engaged gamers to play depending on what is most relevant to their situation.

IMPLICATIONS

What does this mean for the gaming industry? The most important takeout is that gamers should not be treated as a homogenous group who are only interested in action packed games with guns and explosions. There is evidence of a growing appetite for gaming across a whole range of age and gender groups.



A wider demographic means that manufacturers and content producers need to adjust their message to appeal to a broader section of their potential audience. Concentrating only on their core group when designing their brand message will limit sales potential, especially if the game or console itself could have a broader appeal. This is particularly important during key sales periods such as Christmas, where it is not just about creating a mental connection between the brand and gamers but also to make potential gifters aware that this might be the perfect present. By creating either a broader message, or several more targeted ones, a brand has a much higher chance of reaching those audiences who are traditionally only accidentally tapped into and thereby increasing their revenue stream.

Although less traditional gaming audiences are unlikely to be converted to buying latest-generation consoles, this should no longer be seen as a barrier to play. The proliferation of smartphones and tablets even among older people means that an increasingly broad array of people have access to potential gaming devices. Content that is engaging, accessible and suitable for its audience can be successful – regardless of whether that audience is usually associated with playing games or not.

Nevertheless, gamers who are already on-board should not be forgotten; the usage of consoles and PCs for gaming among traditional audiences, such as 18-24 year-old men, is remaining stable and shows no sign of dropping off. Play through smart devices is building, as these gamers look for experiences which they can enjoy while away from their consoles and PCs. Increasing engagement with these gamers, again through tailored and relevant content, will be key for the industry moving forwards. Gaming is expanding in diverse and exciting directions, and the key to taking a bigger piece of this pie is knowing your audiences and what they want.

GameTrack is commissioned and underwritten by ISFE (Interactive Software Federation of Europe) and conducted by Ipsos Connect. For details of subscriptions and published reports please contact Simon Little at ISFE: simon.little@isfe.eu

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ABOUT ISFE

The Interactive Software Federation of Europe (ISFE) comprises 16 major video game publishers and trade associations in 18 European countries. It was established in 1998 to represent the interests of the sector towards countries of the European Economic Area, international institutions and the general public. http://www.isfe.eu

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- **Content and Communications Development:** Communications, content and creative development from early stage idea development through to quantitative pre-testing alongside media & touchpoint planning.
- **Media Measurement:** Audience measurement and understanding.

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