# PRESS RELEASE

## Younger gamers display strong and diverse spending behavior across video game touchpoints.

### Personalization, customization, and the desire for social interaction propel gaming engagement with younger gamers.

### A potential shift from physical to digital game purchase is being driven by these 13-34 consumers.

**October 31, 2023** - Overall, the results of the study illustrate gamers aged P13-34 willingness to invest in gaming content and features to maximize their gaming enjoyment.

These findings are drawn from an Ipsos - Generation Lab survey among 841 Americans aged 13 to 34 who play at least an hour of games a week, conducted August 29, 2023, to September 5, 2023. The survey was conducted via the Generation Lab sample access methodology. Methodology details are provided in the notes to this release.

There is evidence of a large monetization opportunity among Core Gamers – defined as those who play video games for at least 7 hours a week or more, across any device. These gamers present a sizeable opportunity for the industry, as P13-34 Core Gamers represent 66% of the population for this age group.

In the past 6 months, 85% of these P13-34 Core Gamers have spent money in the game sector by purchasing a game, expansion/season/battle pass, microtransactions, or gaming subscription service. Among these gamers, spending tends to be diversified. More than a third of these gamers (39%) have spent on 3 or more of our key monetization touchpoints, rising to 60% who have spent across at least 2 monetization touchpoints.

**Gamers Playing Games ≥7 Hours a Week Across Devices**

| | **Ages 13-34**<br>**N=627** |
|---|---|
| Made at least 1 game related purchase | 85% |
| Made at least 2 game related purchases | 60% |
| Made at least 3 game related purchases | 39% |

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These younger games have most commonly purchased a digital copy of a video game (46%), followed by playing a game through a gaming subscription service (44%) or buying in-game microtransactions (35%).

**Gaming Monetization Touchpoints Among Gamers Playing ≥7 Hours a Week Across Devices**

| | **Ages 13-34**<br>**N=627** |
|---|---|
| Purchased a digital copy of a video game | 46% |
| Played a game through a subscription service | 44% |
| Purchased microtransactions or made an in game purchase | 35% |
| Purchased a video game expansion/season pass | 29% |
| Purchased a battle pass | 26% |
| Purchased a physical copy of a video game | 25% |
| Paid a subscription to play a live service game | 17% |

Personalization/customization and social interaction are critical to video gaming engagement with P13-34 Core Gamers. In the past 6 months, more than half of these consumers have used a personalized avatar or character (62%) or chatted with other players while gaming (56%). An important portion of these gamers tend to become emotionally invested while gaming, with more than 1-in-4 (28%) reporting that they have gotten angry with another player within the past 6 months.

**Behaviors Among Gamers Playing ≥7 Hours a Week Across Devices**

| | **Ages 13-34**<br>**N=627** |
|---|---|
| Used a personalized avatar or character | 62% |
| Chatted with other players within a game | 56% |
| Got angry with another player | 28% |
| Missed at least two meals in a row | 16% |
| Missed class or work to play a game | 9% |

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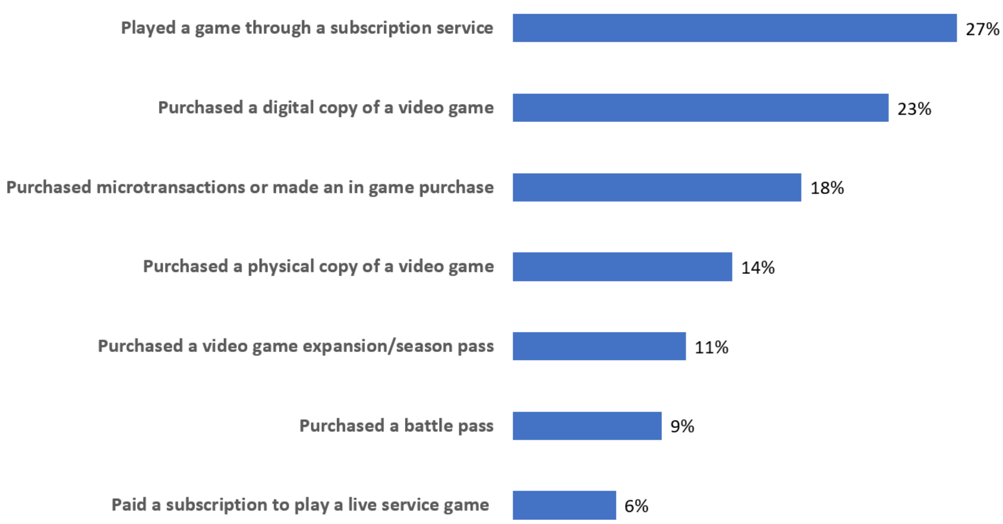
There is also evidence that these younger gamers are driving a shift from physical to digital game purchases. Among P13-34 Core Gamers, past six-month purchase of a digital copy of a video game (46%) is nearly twice as high as a purchase of a physical copy of a video game (25%).

Half of casual P13-34 Core Gamers have engaged with at least one of the measured monetization touchpoints in the past six months, while nearly 1-in-4 (23%) engaged with a singular touchpoint. These casual gamers are most likely to play games through a subscription service (27%) or have purchased a digital copy of a video game (23%).

Gaming Monetization Touchpoints Among Gamers
Playing <7 Hours a Week Across Devices




Ipsos x Generation Lab State of Gaming, October 2023. Gamers Playing <7 Hours a Week Across Devices, N = 236

*Christopher Hoffman, Senior Vice-President of Ipsos Media and Entertainment noted: “It is positive to see younger gamers, despite less overall discretionary income than older cohorts, spending across a variety of gaming touchpoints. These gamers are willing to dip into their own wallets to amplify and personalize their gaming experience.”*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METHODOLOGY

This Ipsos Generation Lab poll was conducted August 29 - September 5, 2023, using Generation Lab's online youth and teens panel. This poll is based on a nationally representative sample of 954 general population of people 13-34 years old, including 841 who play games for at least an hour or longer each week.

The margin of error reported for this survey was computed using the classical Simple Random Sampling formula with an adjustment for the estimated design effect. The margin of error assumes that the weighted estimates are approximately unbiased. This assumption of approximate unbiasedness is based on our assertion that any differences between the survey sample and the target population on key survey outcomes are corrected by raking on the demographics listed in the weighting description.

The margin of sampling error for this study is plus or minus 4.4 percentage points at the 95% confidence level, for results based on the entire sample of adults. The margin of sampling error takes into account the design effect, which was 1.36 for all respondents. The margin of sampling error for this study is plus or minus 4.6 percentage points at the 95% confidence level, for results based on the sample of respondents who play at least one hour of games each week.

In our reporting of the findings, percentage points are rounded off to the nearest whole number. As a result, percentages in a given table column may total slightly higher or lower than 100%. In questions that permit multiple responses, columns may total substantially more than 100%, depending on the number of different responses offered by each respondent.

The survey was conducted using Generation Lab's online teen and youth respondent panel. Generation Lab leverages the internet, social media, and search platforms to create a non-probability panel This panel is built to reflect individuals of all backgrounds ages 13-34 in the United States.

Generation Lab utilize a geographic frame made up of a set of randomized geographic units, selected by applying probability proportional to size (PPS) sampling, to recruit participants.

The data for the total sample were weighted to adjust for gender by age, sex, race, ethnicity, and education. The demographic benchmarks came from the 2021 and 2019 American Community Survey (ACS). The weighting categories were as follows:

- Age Group (13-17, 18-24, 25-29, 30-34)
- Sex (Male, Female)
- Race (White, Black or African American, Asian or Native Hawaiian and Other Pacific Islander, All Remaining Groups)
- Ethnicity (Hispanic or Latino, Not Hispanic or Latino)
- Education (High School Graduate or Below, Some College or Associate's Degree, Bachelor's Degree or Above)

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## About Ipsos

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Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 solutions are based on primary data from our surveys, social media monitoring, and qualitative or observational techniques.

Our tagline "Game Changers" sums up our ambition to help our 5,000 customers move confidently through a rapidly changing world.

Founded in France in 1975, Ipsos has been listed on the Euronext Paris since July 1, 1999. The company is part of the SBF 120 and Mid-60 indices and is eligible for the Deferred Settlement Service (SRD).ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP

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