



THE STATE OF GAMING

A STUDY OF ADULT
GAMING HABITS
BY PCH INSIGHTS | ESHAP

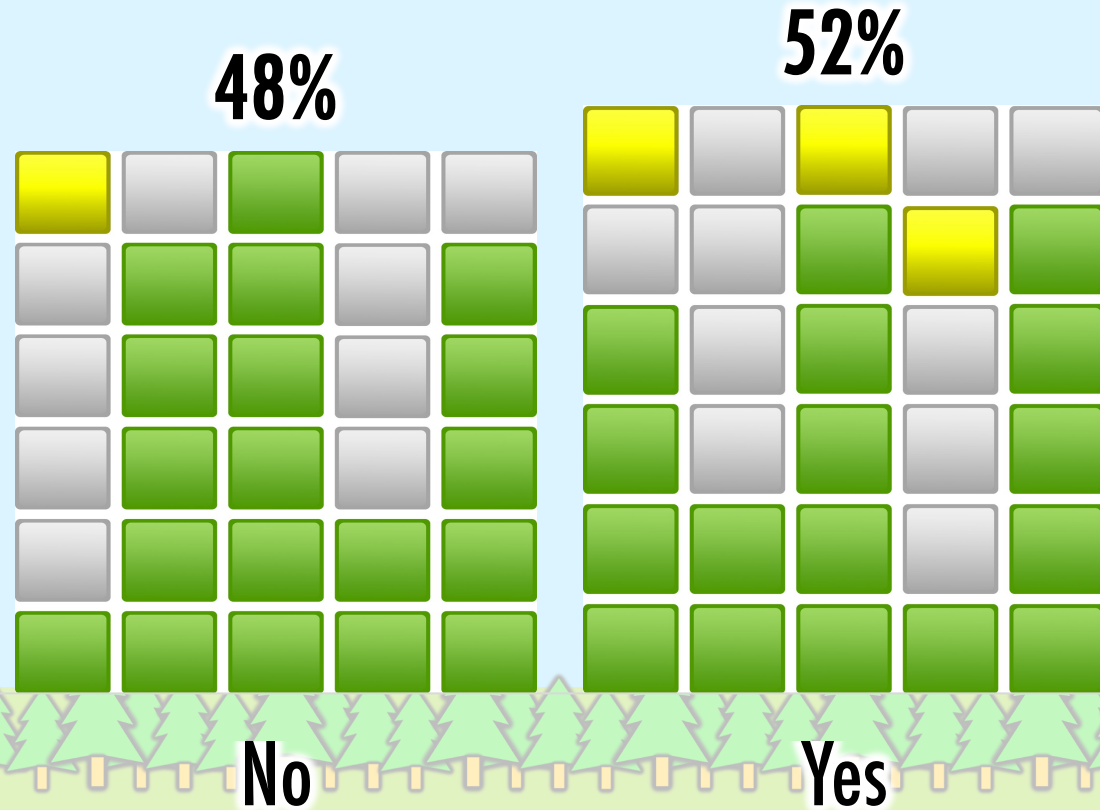
Gaming is a \$200 billion business. There are 3.6 billion gamers in the world. Yet, despite the pervasive presence of digital gaming in our lives, there are many misperceptions and misunderstandings about the global gaming market. This is why we decided to study the adult gaming market in the US by surveying American gamers 25+; looking at their gaming habits, the devices they use, the formats they favor, the genres they play, and how their engagement is monetized.

We surveyed 68,760 adults 25+, and we learned many things we think you will find surprising. Notably, the gaming community may look a bit different than how you perceive it – older, more female, and far less console-based than how conventional wisdom usually paints modern gamers.

Game on...

DO YOU PLAY VIDEO GAMES?

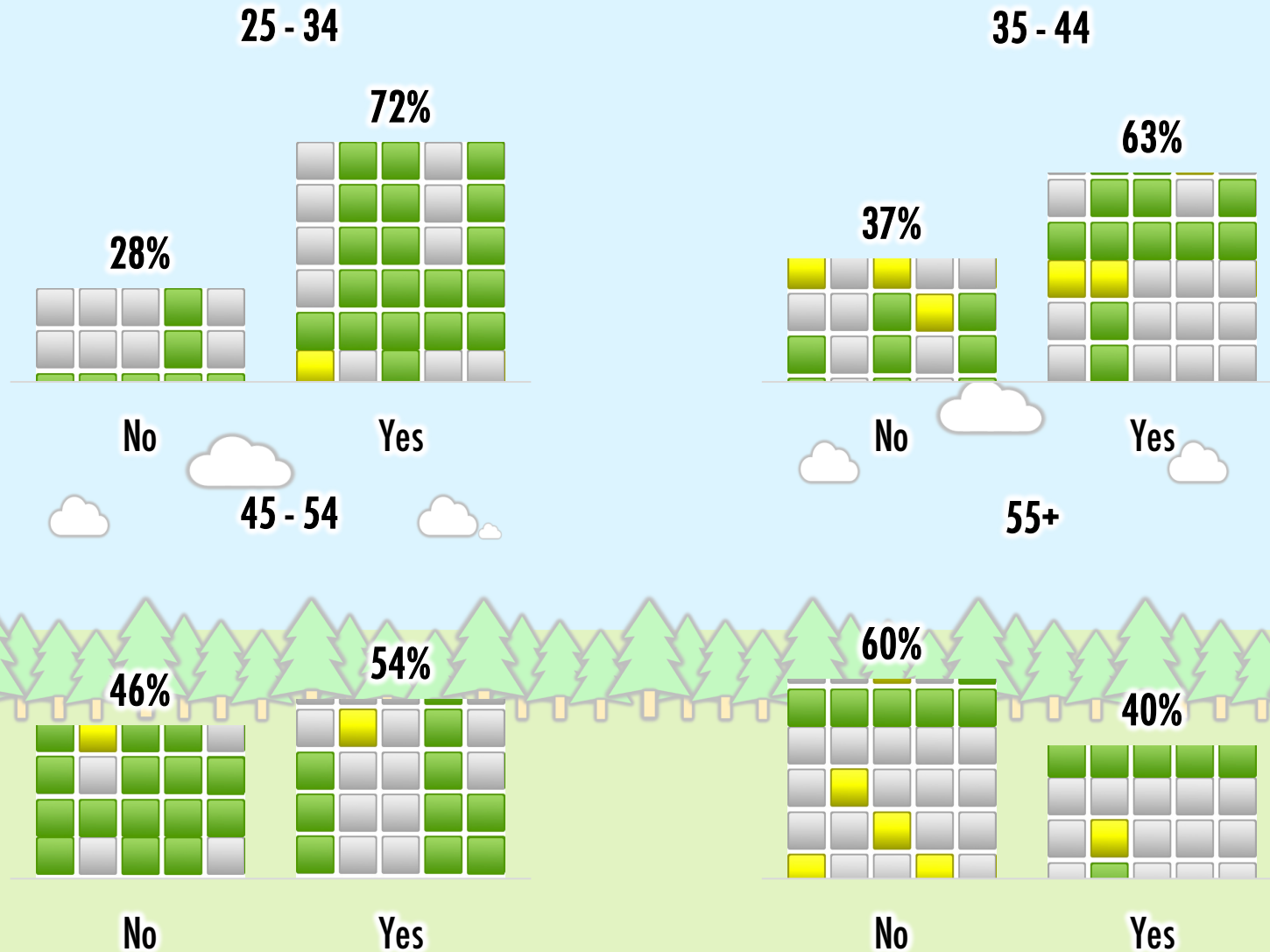
n=68,760 | SOURCE: PCH INSIGHTS | CHART: ESHAP



**MORE THAN HALF OF AMERICANS
OVER 25 ARE REGULAR GAMERS.**

DO YOU PLAY VIDEO GAMES?

n=68,760 | SOURCE: PCH INSIGHTS | CHART: ESHAP



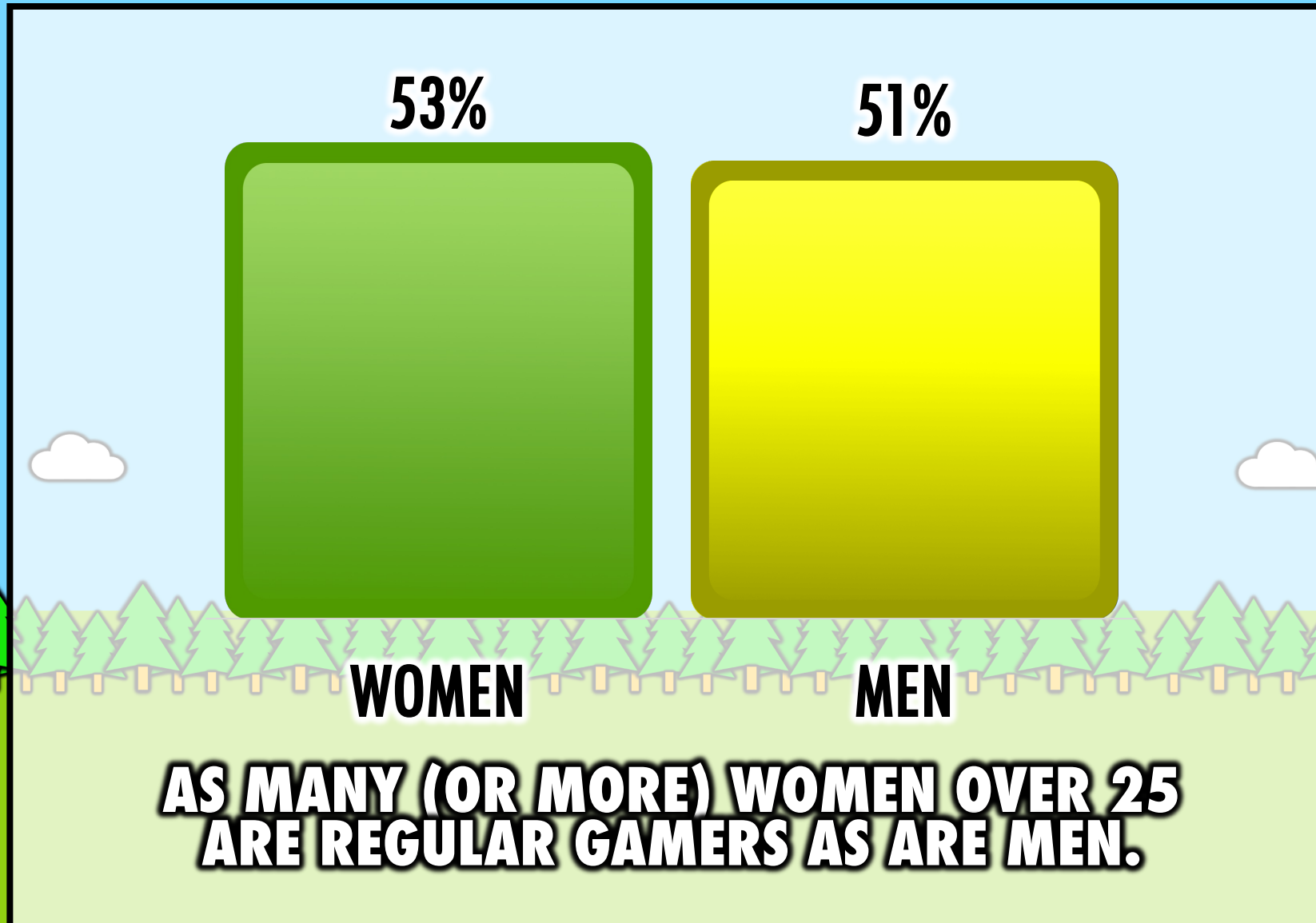
Contrary to what many think about gaming, it is *not* the exclusive purview of the young.

Yes, three-quarters of the 25-34 demo games, but so do nearly two-thirds of adults 35-44, more than half of 45-54-year-olds, and forty percent of adults over 55.

The adult gaming market is big and growing.

VIDEO GAMERS: BY GENDER

n= 35,473 (RESPONDENTS WHO ARE GAMERS) | SOURCE: PCH INSIGHTS | CHART: ESHAP



WOMEN

MEN

**AS MANY (OR MORE) WOMEN OVER 25
ARE REGULAR GAMERS AS ARE MEN.**

VIDEO GAMERS: BY GENDER & AGE

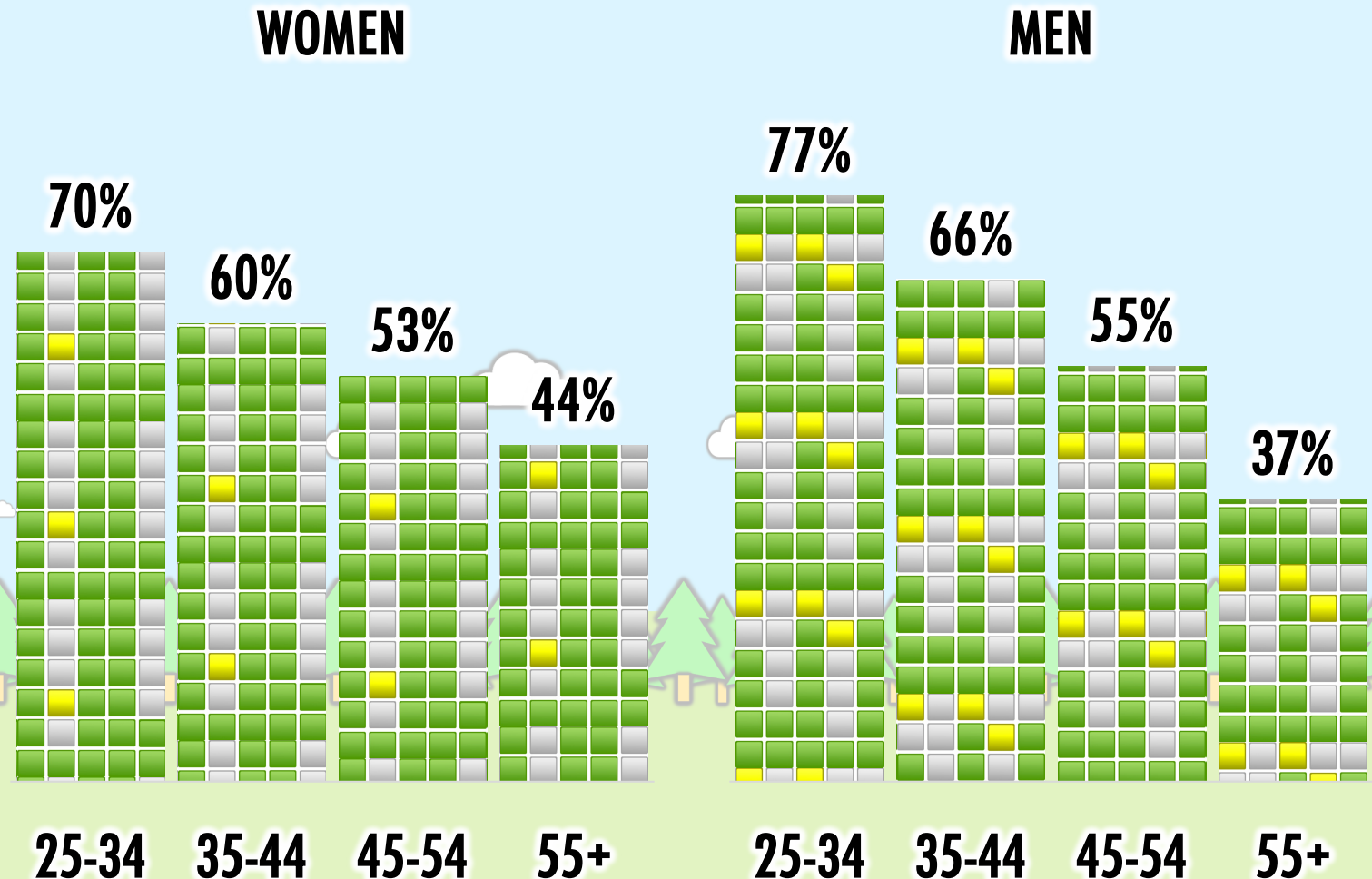
n= 35,473 (RESPONDENTS WHO ARE GAMERS) | SOURCE: PCH INSIGHTS | CHART: ESHAP

Younger men game at a *slightly* higher rate than younger women.

That ratio evens-out as the demos age up.

However, a materially larger share of women over 55 say they regularly game than do men 55+.

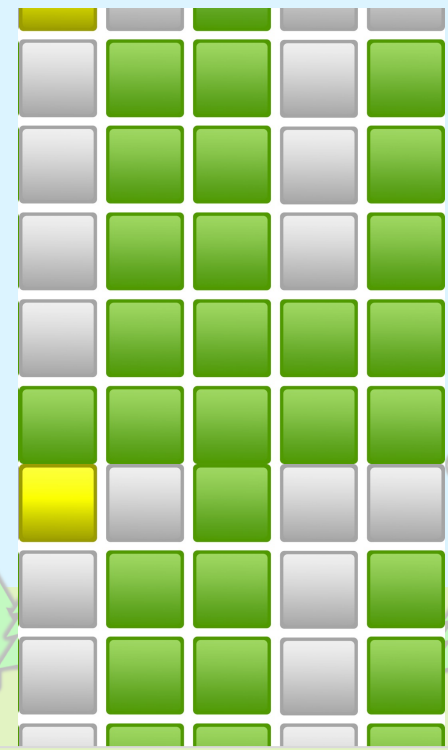
**WOMEN 55+
GAME 19%
MORE THAN
MEN OVER 55.**



WHICH TYPE OF GAMES DO YOU PLAY?

n= 35,871 | SOURCE: PCH INSIGHTS | CHART: ESHAP

58%



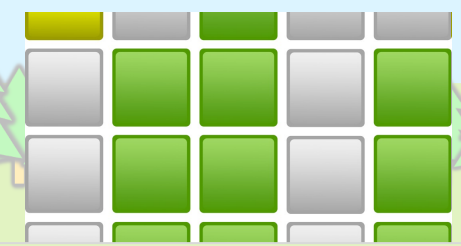
Free Games

12%



Paid Games

18%



Both Equally

Perhaps another surprising finding is that the gaming industry is not as driven by game purchases as many perceive.

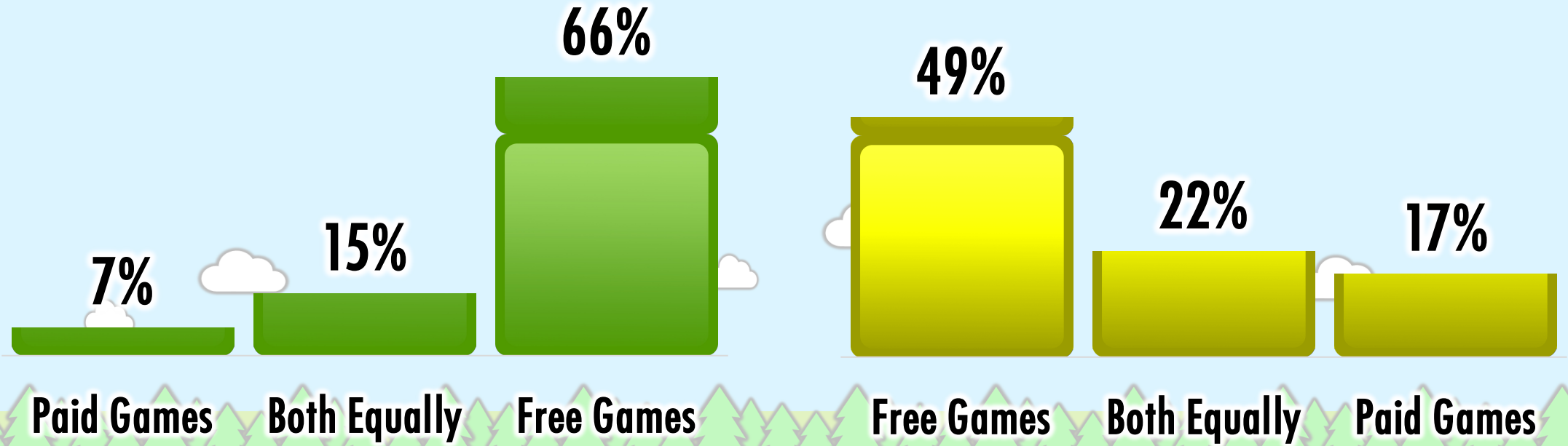
**5X GAMERS
PLAY FREE
GAMES
OVER PAID**

WHICH TYPE OF GAMES DO YOU PLAY?

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WOMEN

MEN

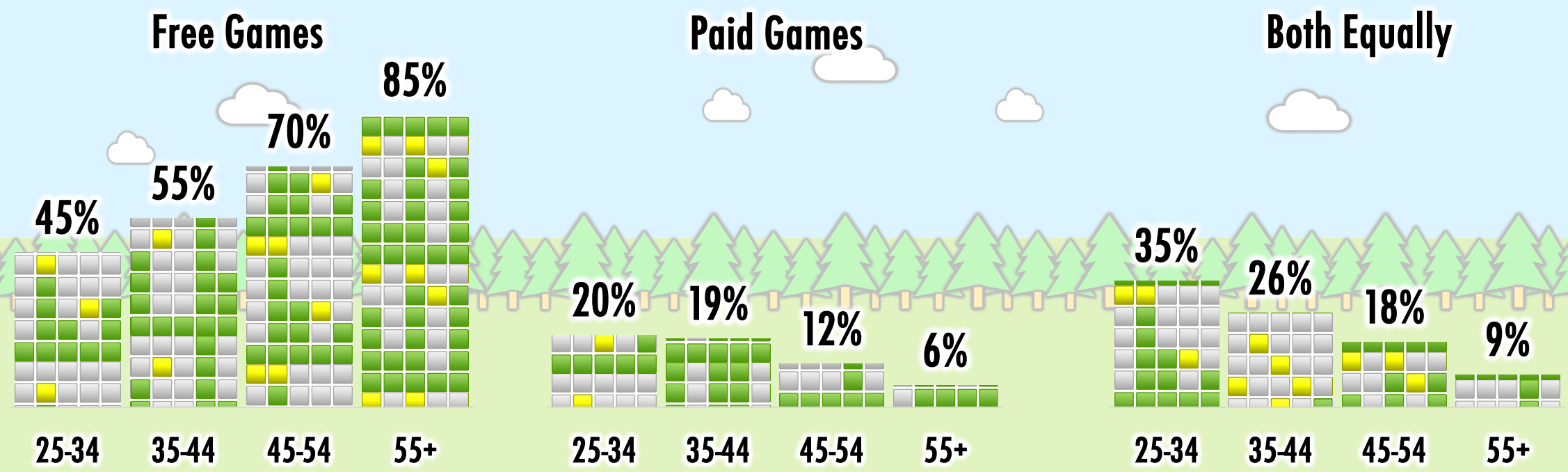


**2/3 OF WOMEN GAMERS FAVOR FREE GAMES OVER PAID.
NEARLY HALF OF MALE GAMERS PREFER FREE OVER PAID.**

WHICH TYPE OF GAMES DO YOU PLAY?

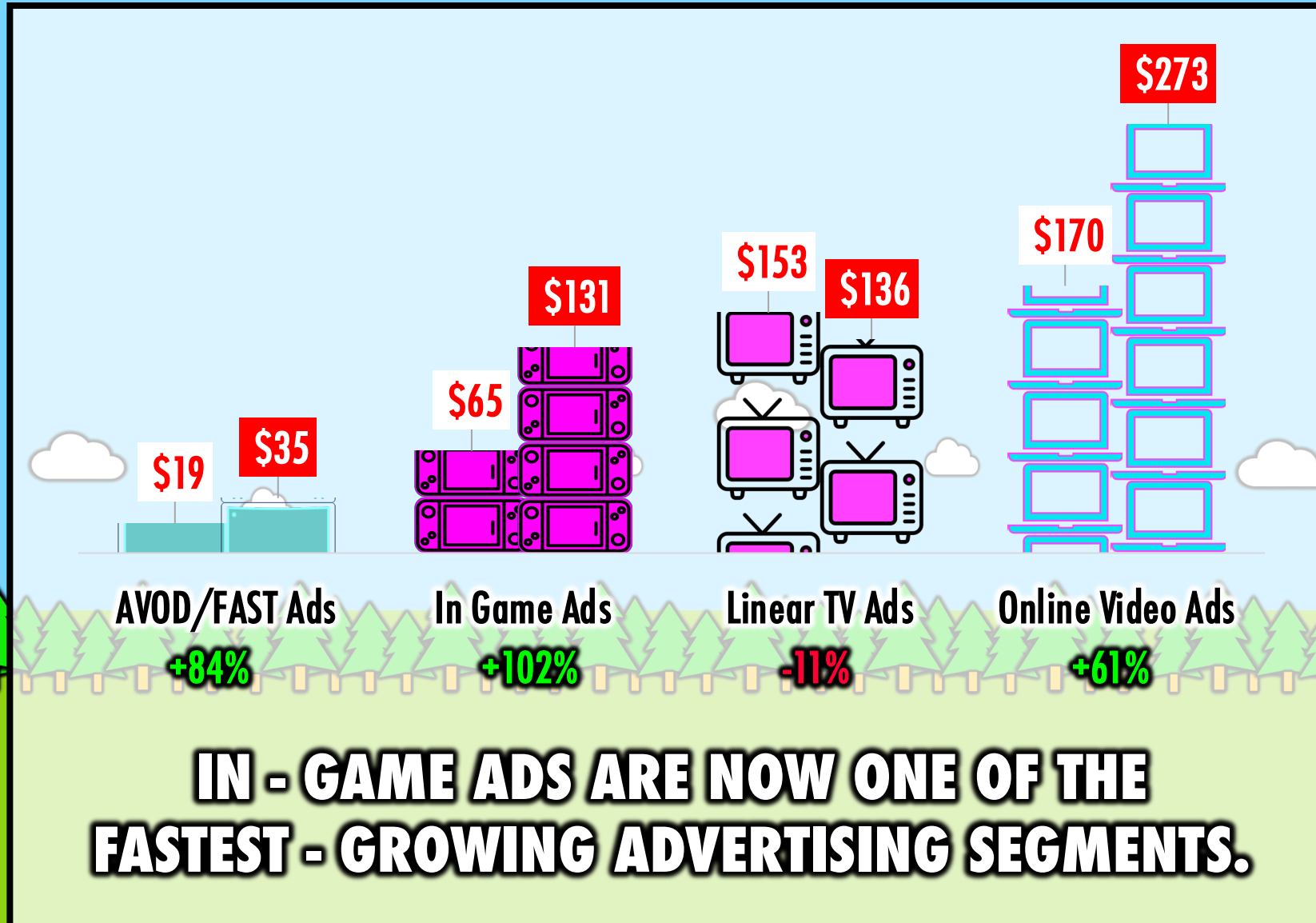
n= 35,871 | SOURCE: PCH INSIGHTS | CHART: ESHAP

**PAID GAME USE IS PRIMARILY DRIVEN BY YOUNGER PLAYERS.
YET, YOUNGER CONSUMERS STILL PREFER FREE OVER PAID.
THIS PREFERENCE GETS STRONGER AS DEMOS AGE.**



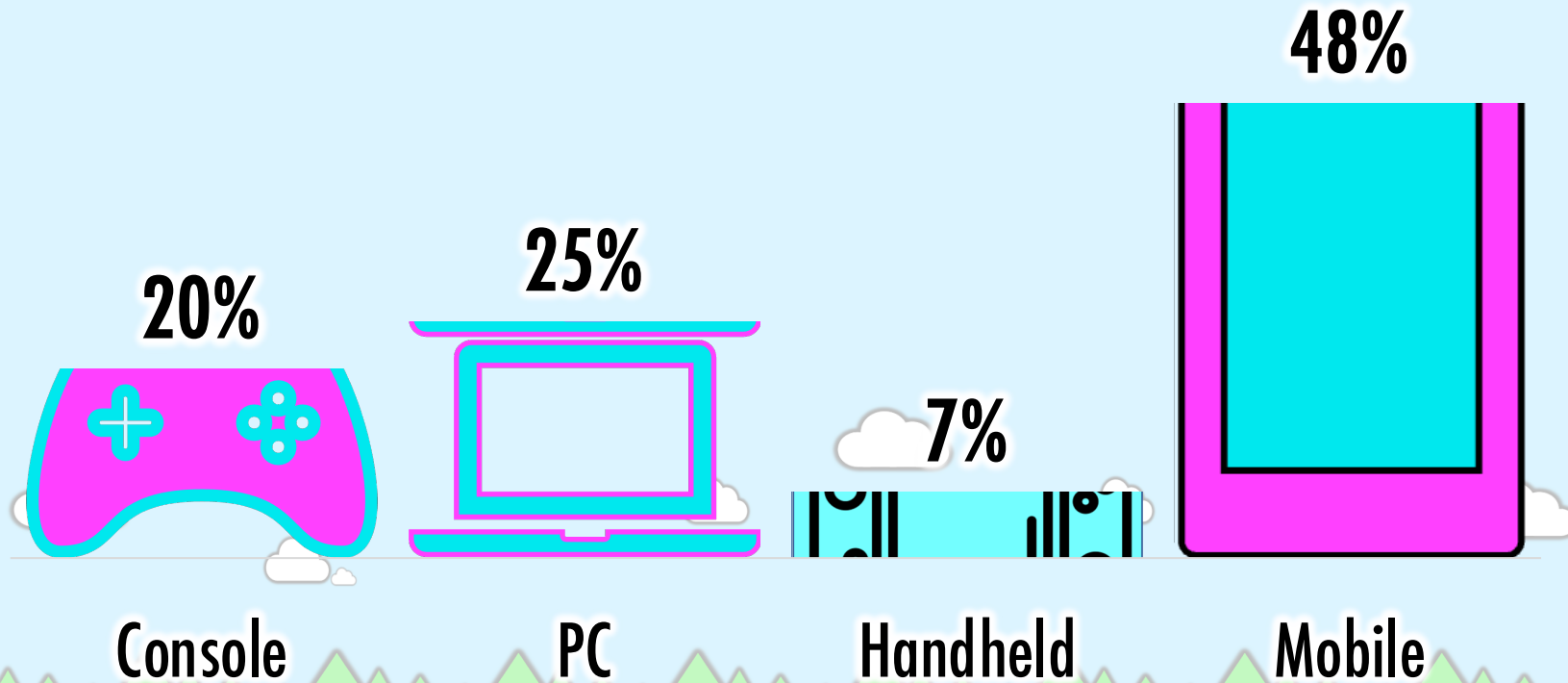
AD REVENUE: WORLDWIDE 2022-2027

SOURCE: OMDIA | CHART: ESHAP | IN BILLIONS



WHICH DO YOU USE TO PLAY GAMES?

n= 35,473 (RESPONDENTS WHO ARE GAMERS) | SOURCE: PCH INSIGHTS | CHART: ESHAP

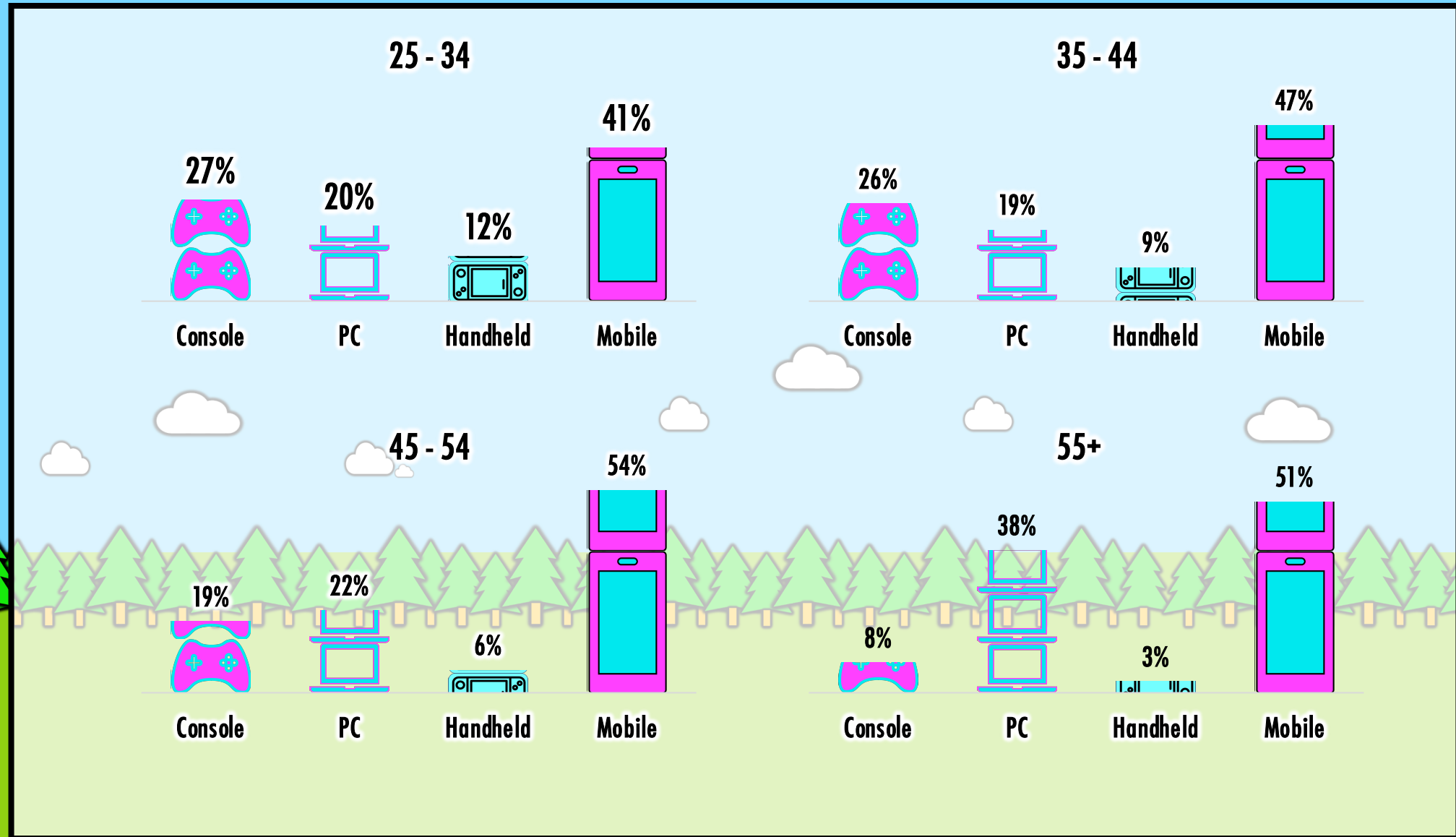


GAME USAGE AND ECONOMICS ARE LARGELY DRIVEN BY GAMERS' DEVICE/PLATFORM PREFERENCES.

SMART PHONES ARE GAMERS' FIRST CHOICE DEVICE.

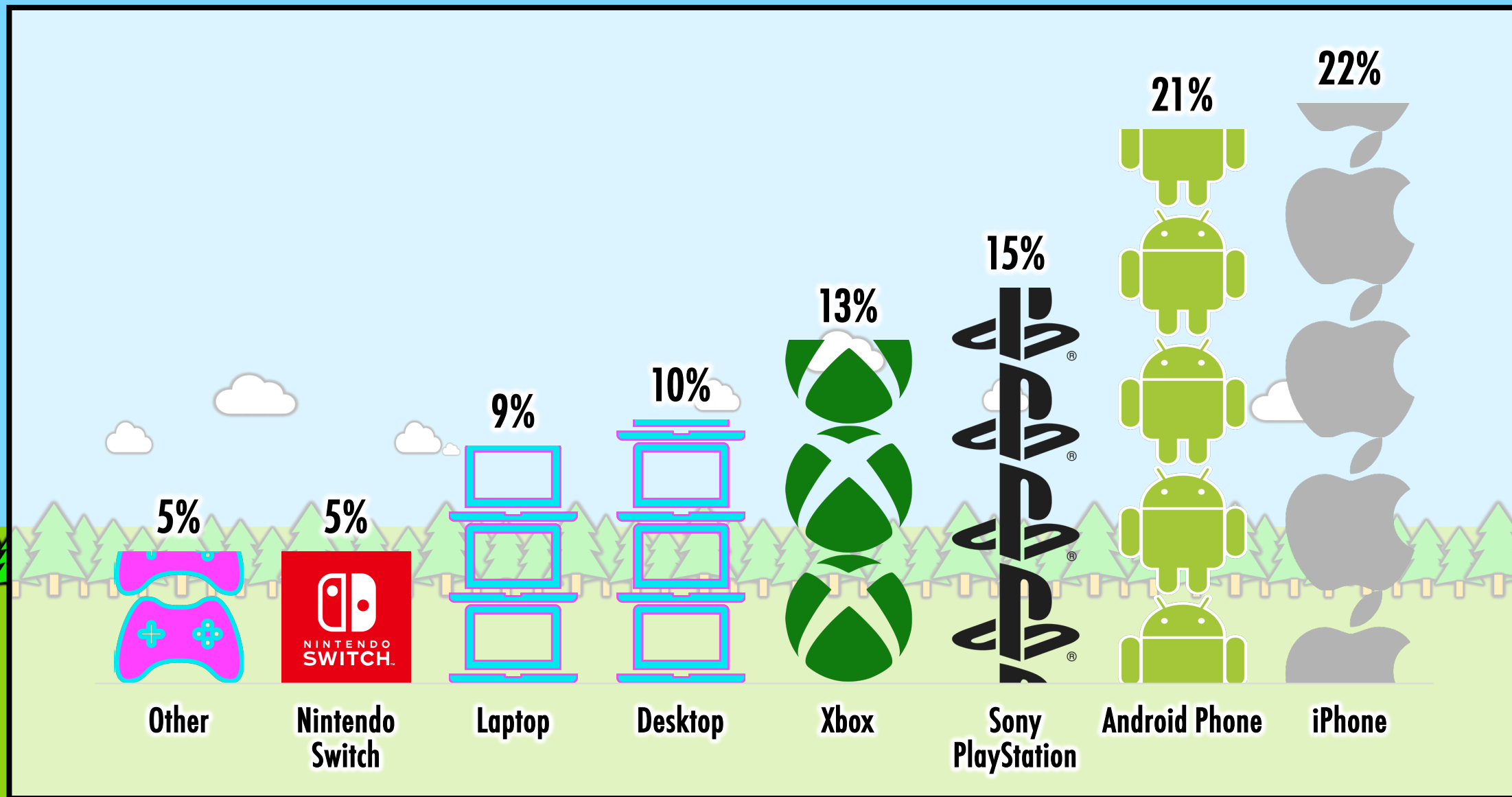
WHICH DO YOU USE TO PLAY GAMES?

n= 35,473 (RESPONDENTS WHO ARE GAMERS) | SOURCE: PCH INSIGHTS | CHART: ESHAP



WHICH IS YOUR DEVICE OF CHOICE FOR GAMING?

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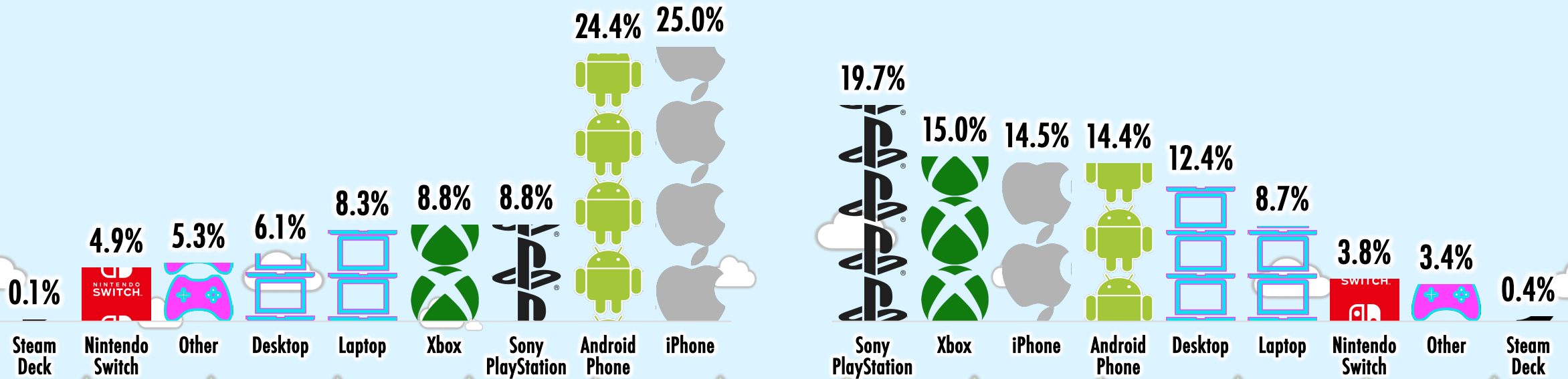


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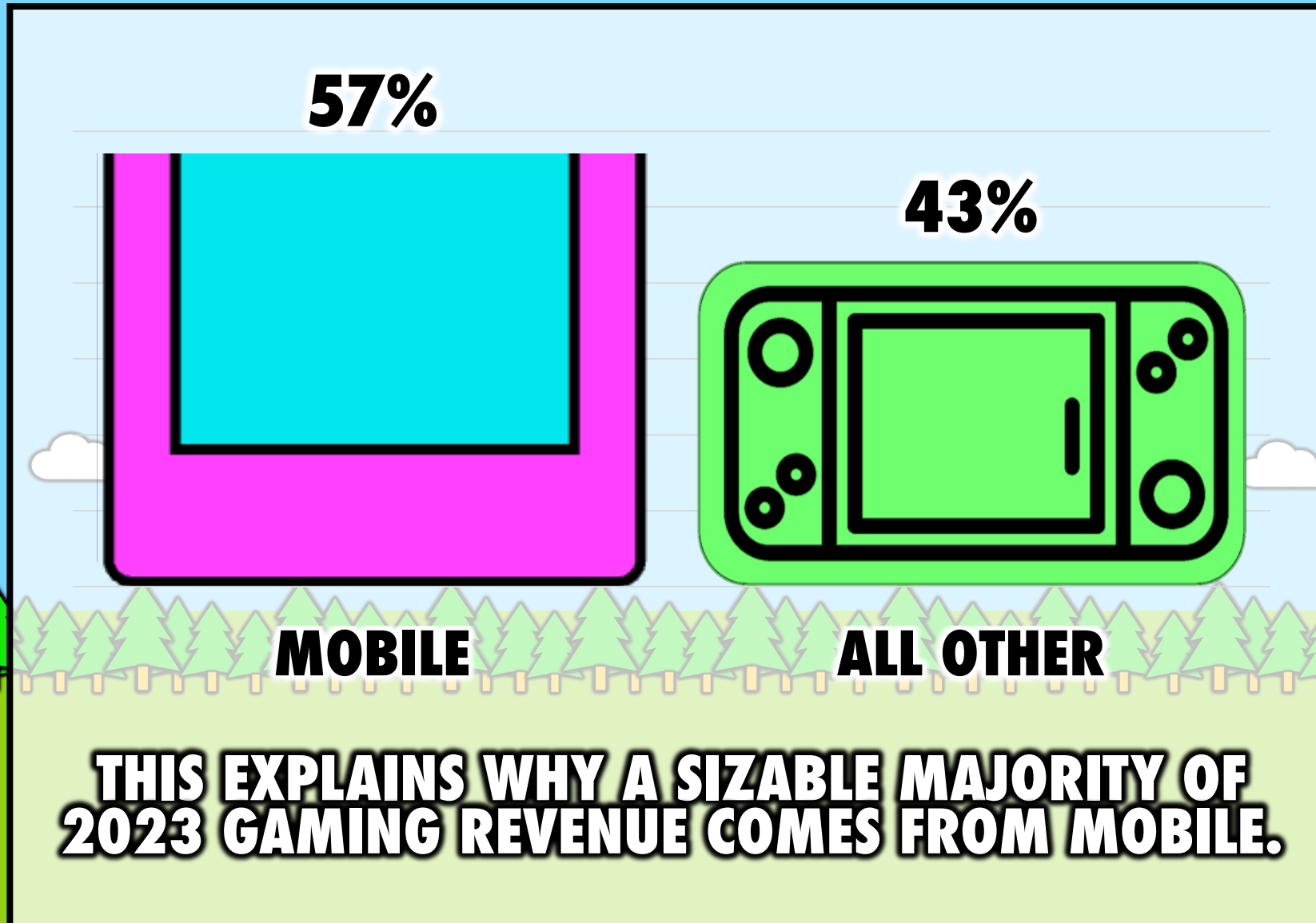


**WOMEN MAKE UP AT LEAST HALF OF US GAMERS OVER 25,
AND THEY PREFER MOBILE GAMING > 5X OTHER PLATFORMS.**

**MEANWHILE, MEN OVER 25 USE AN ARRAY OF DEVICES / PLATFORMS.
NO ONE DEVICE GETS 20% OF MALE 20+ PLAYING TIME.**

2023 GAMING REVENUE BY PLATFORM

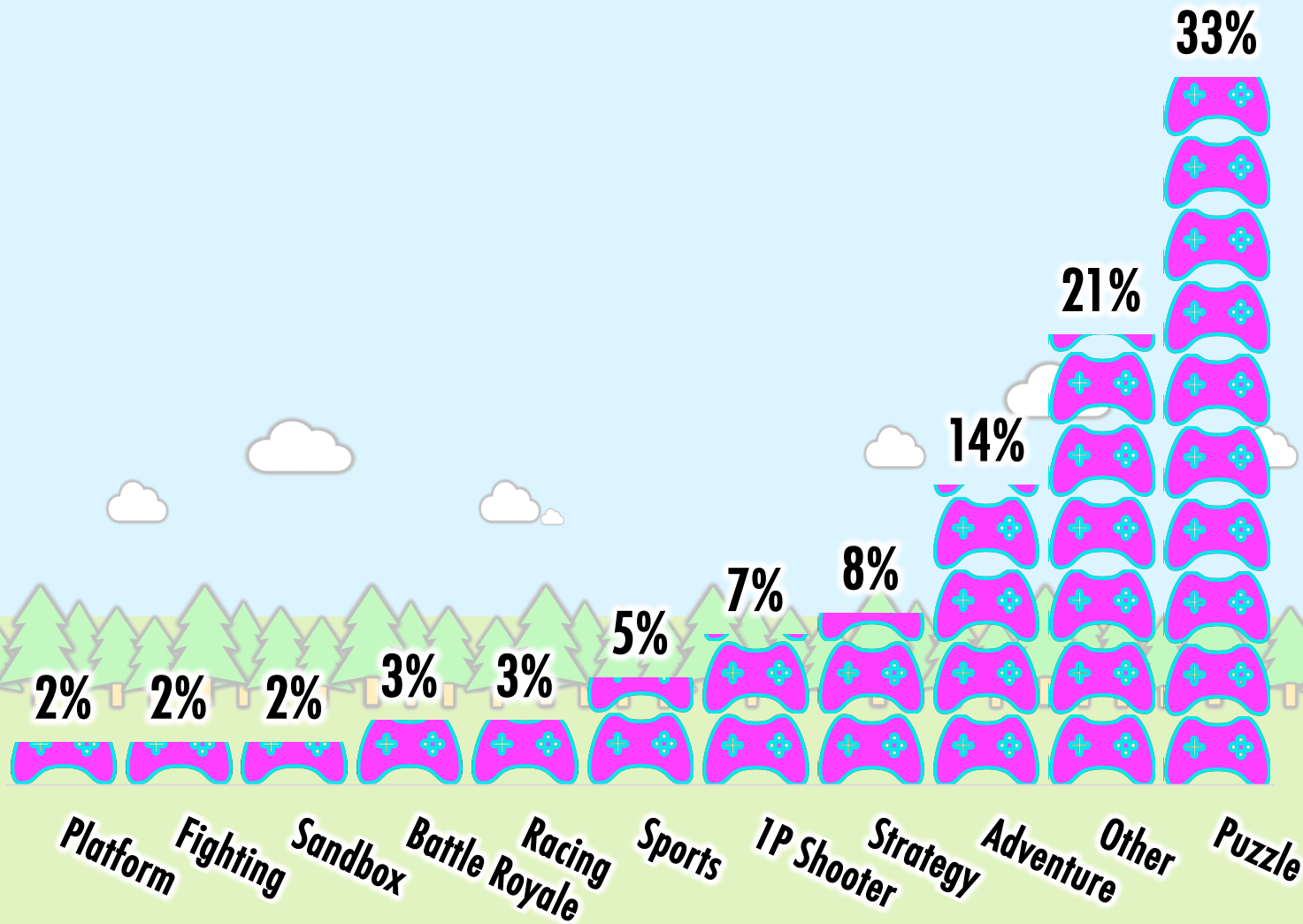
SOURCE: AMPERE ANALYSIS | CHART: ESHAP



THIS EXPLAINS WHY A SIZABLE MAJORITY OF 2023 GAMING REVENUE COMES FROM MOBILE.

WHICH GENRE OF GAMES IS YOUR FAVORITE?

n= 35,871 | SOURCE: PCH INSIGHTS | CHART: ESHAP

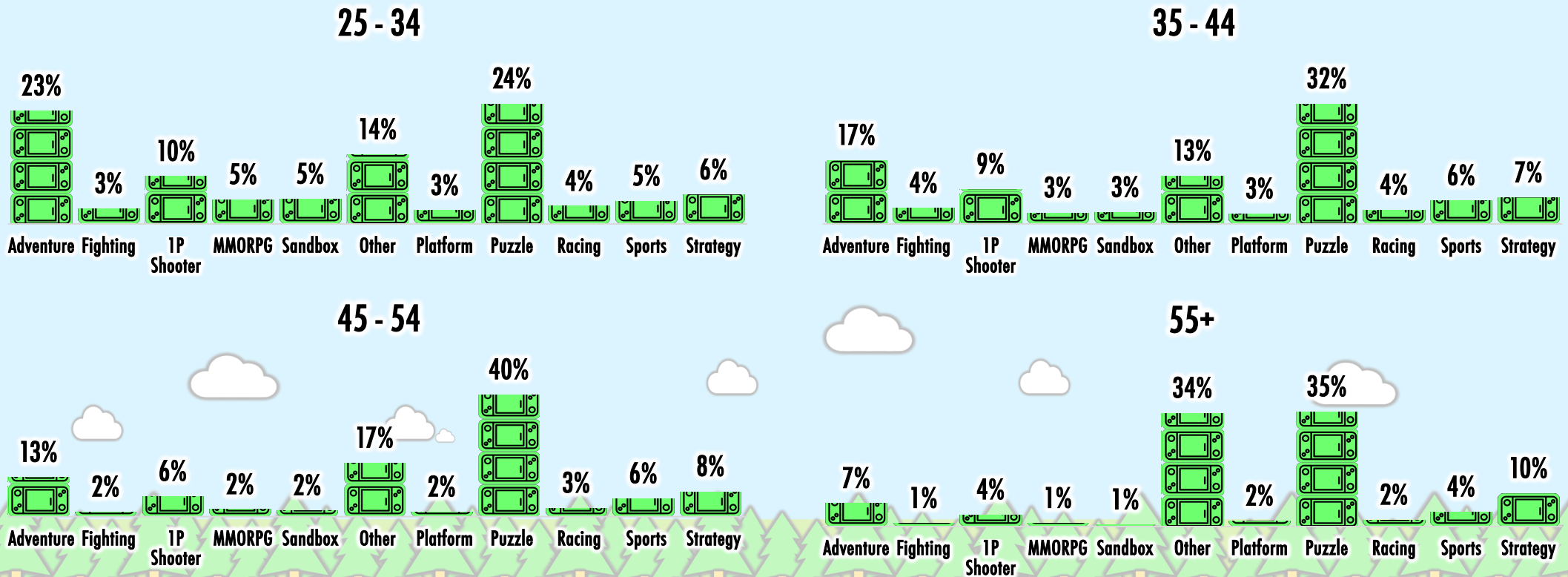


While games like Madden, FIFA, Call of Duty and Fortnite get a lot of buzz, Puzzle games such as Wordle, Candy Crush, and Fishdom, dominate game-play for US adults.

**IN JULY 2023,
PUZZLE GAME
ROYAL MATCH
HAD 16 MILLION
DOWNLOADS**

WHICH GENRE OF GAMES IS YOUR FAVORITE?

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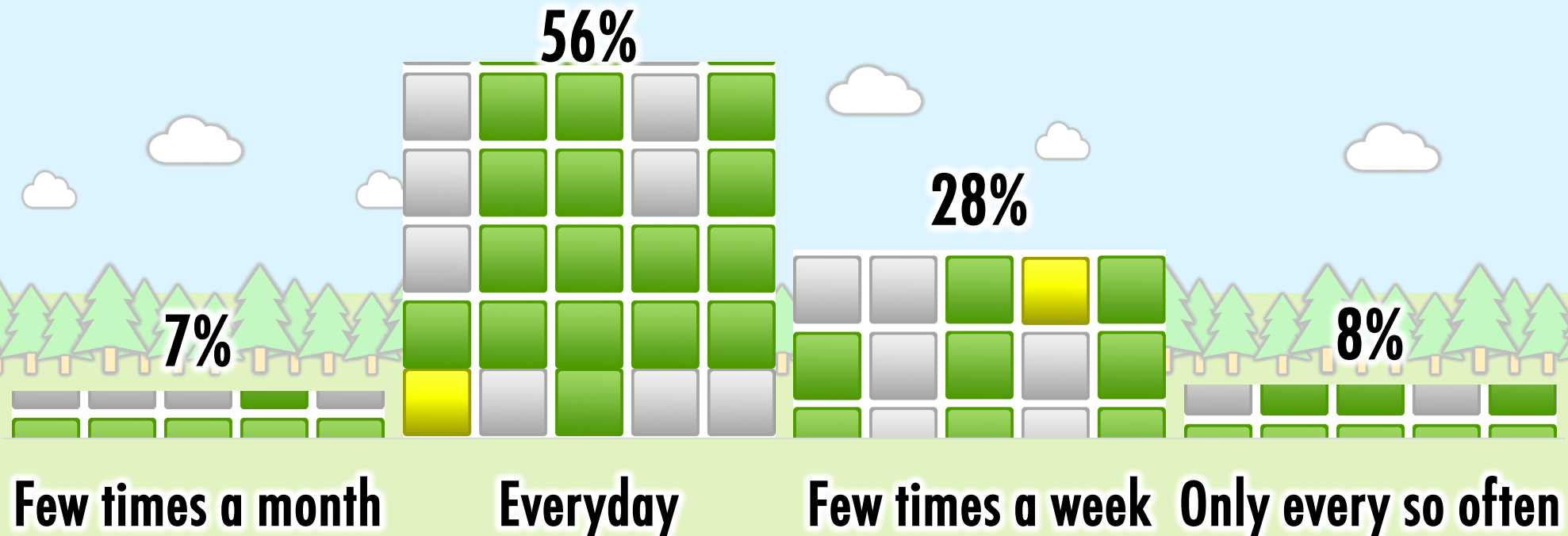
GENRE PREFERENCES FLUCTUATE BY AGE, BUT FOR ALL DEMOS OVER 25 PUZZLE GAMES ARE THE #1 GAMING GENRE, WITH THAT PREFERENCE STRENGTHENING AS AGES RISE.

HOW OFTEN DO YOU PLAY VIDEO GAMES?

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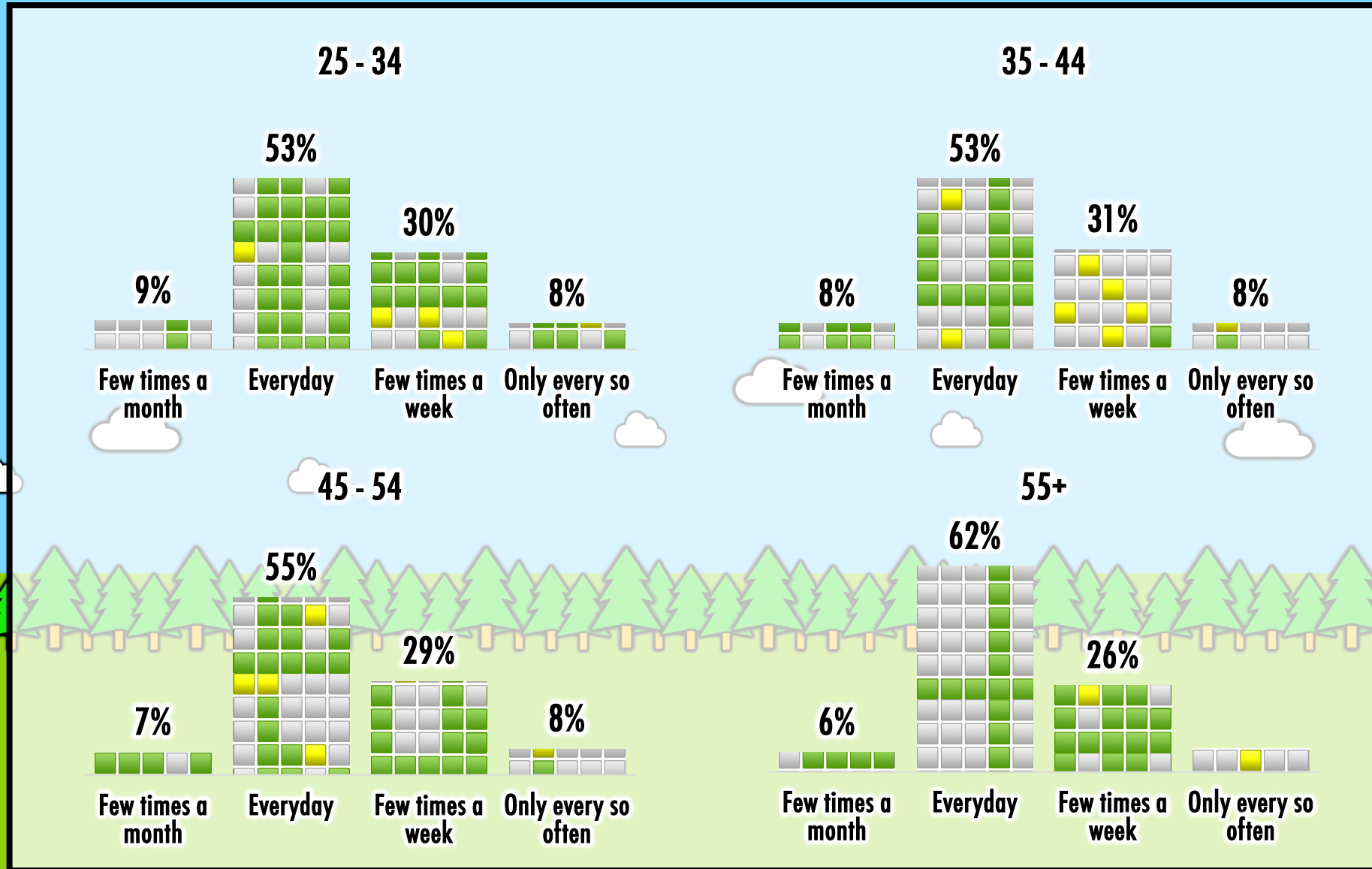
**A GOOD DEAL OF GAMING IS CATEGORIZED AS "CASUAL,"
YET GAMING FOR US ADULTS OVER 25 IS ANYTHING BUT.**

84% OF ADULT GAMERS PLAY EVERYDAY OR A FEW TIMES PER WEEK.



HOW OFTEN DO YOU PLAY VIDEO GAMES?

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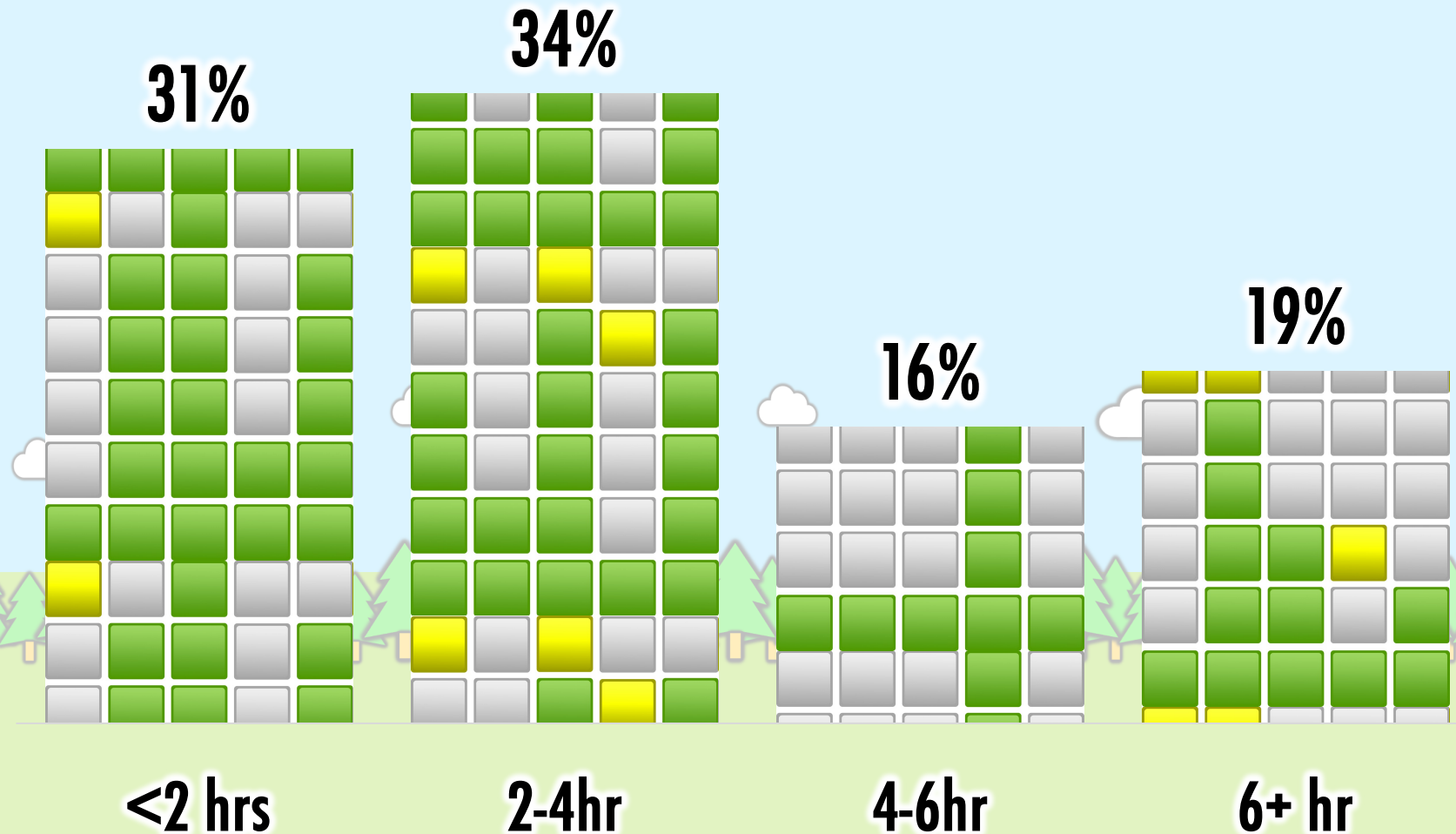


HOW MUCH TIME PER WEEK DO YOU SPEND GAMING?

n= 35,473 (RESPONDENTS WHO ARE GAMERS) | SOURCE: PCH INSIGHTS | CHART: ESHAP

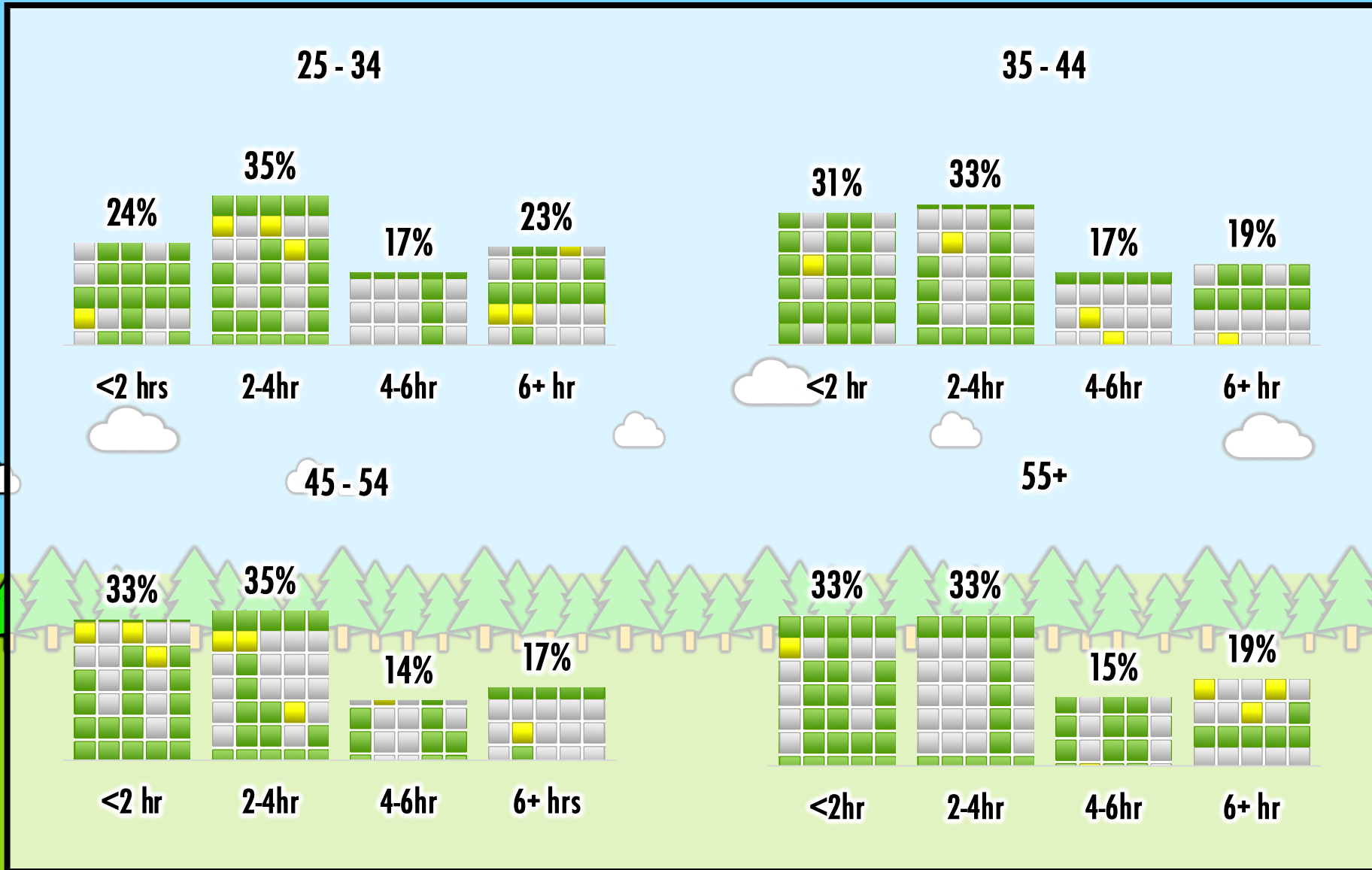
31% of US adult gamers play less than 2 hours per week. However, 69% say they play two hours or more every week.

ONE - THIRD OF GAMERS 25+ PLAY AT LEAST FOUR HOURS EACH WEEK.



HOW MUCH TIME PER WEEK DO YOU SPEND GAMING?

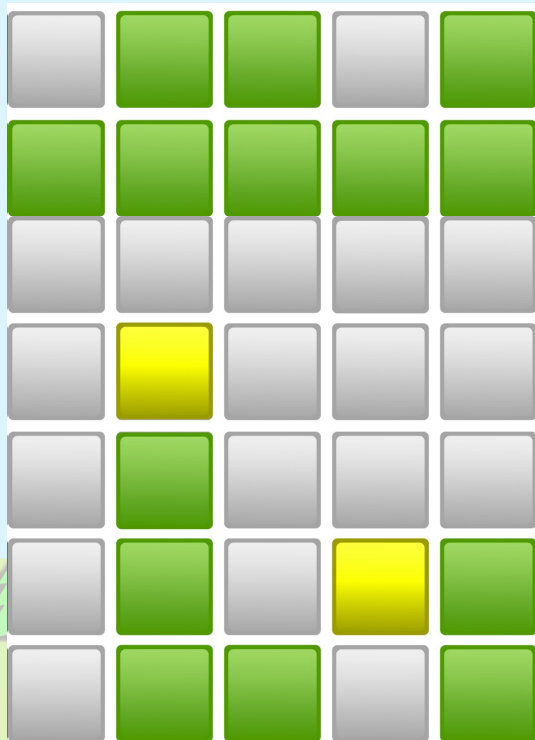
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HAVE YOU EVER MADE AN IN-GAME PURCHASE?

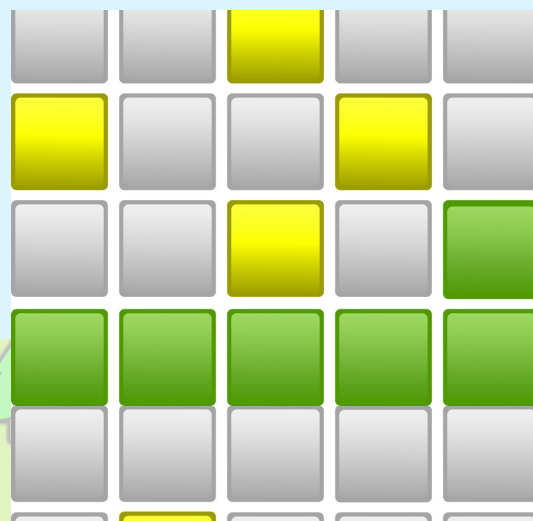
n= 35,473 (RESPONDENTS WHO ARE GAMERS) | SOURCE: PCH INSIGHTS | CHART: ESHAP

59%



No

41%



Yes

Free gaming may dominate adult game-play, but that doesn't mean playing is free.

In-game purchases are a sizable driver of gaming economics. These can come in the form of virtual objects, extra lives, or (in mobile games) loot boxes.

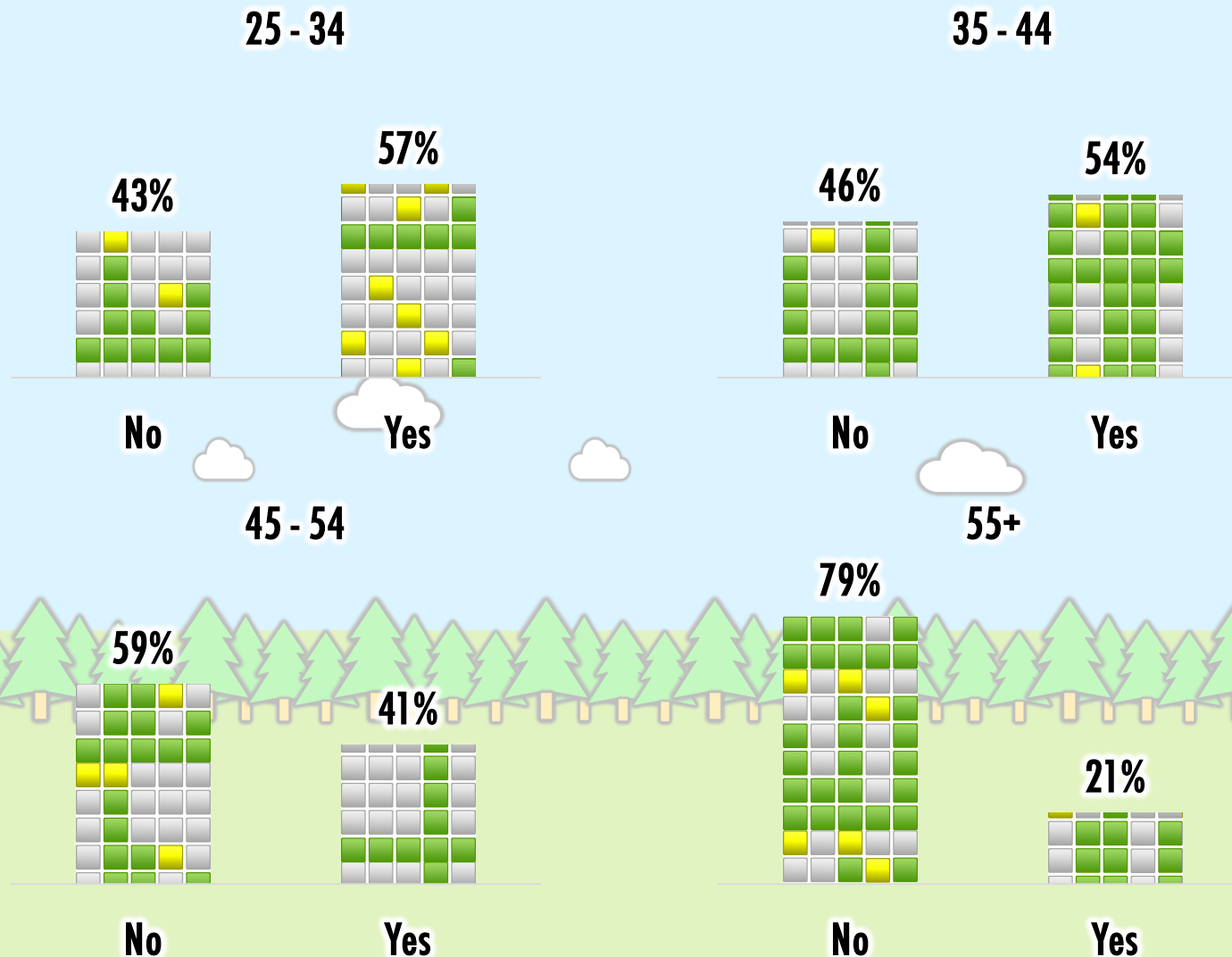
4 IN 10 ADULT GAMERS HAVE MADE IN - GAME PURCHASES

HAVE YOU EVER MADE AN IN-GAME PURCHASE?

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The data shows that the younger consumers are, the more likely they are to pay for the media they use - including gaming.

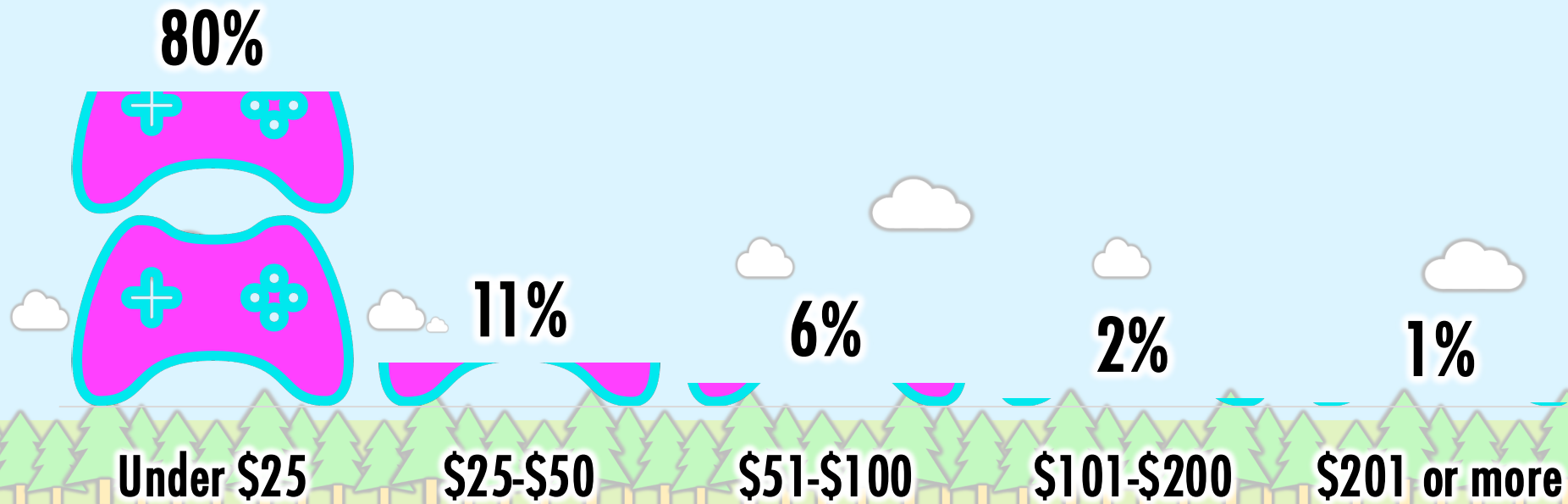
Even so, 41% of A45-54 say they make in-game purchases, and one-fifth of gamers over 55 buy lives, objects, or other stuff in the games they play.



HOW MUCH PER MONTH DO YOU SPEND ON GAMING?

n= 35,871 | SOURCE: PCH INSIGHTS | CHART: ESHAP

IF THE GAME IS FREE, IS IT REALLY?

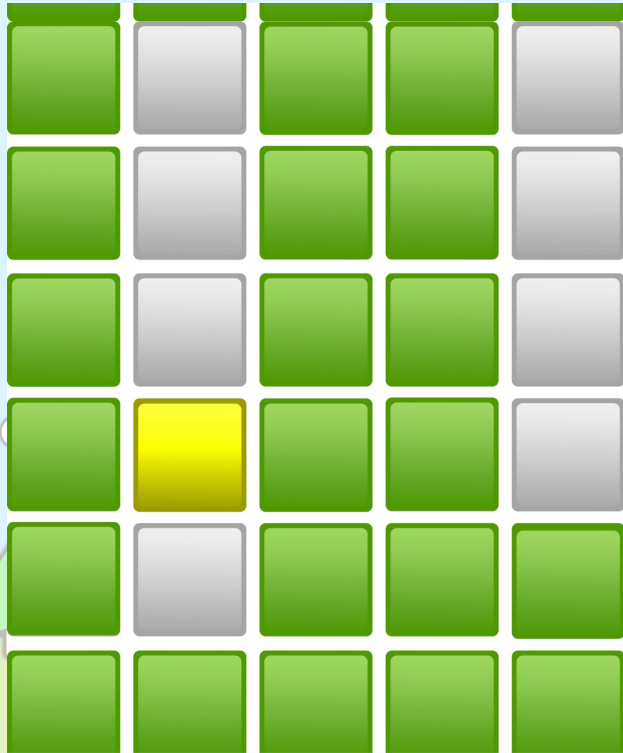


20% OF ADULT GAMERS SAY THEY SPEND \$25 OR MORE PER MONTH IN TOTAL ON THEIR GAMING HABITS.

DO YOU SUBSCRIBE TO A GAMING SERVICE?

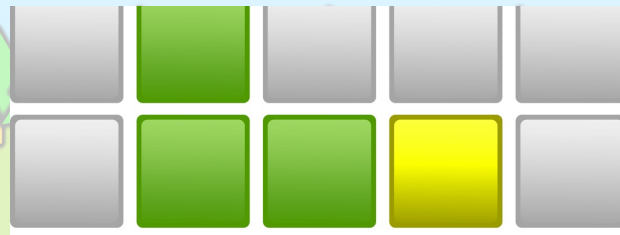
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76%



No

24%



Yes

Game subscriptions are a growing segment of the sector (Playstation+ has ≈50 million paying subscribers).

Nearly one-quarter of America's adult gamers now say they subscribe to a gaming service.

There are 3.6 billion in the world.

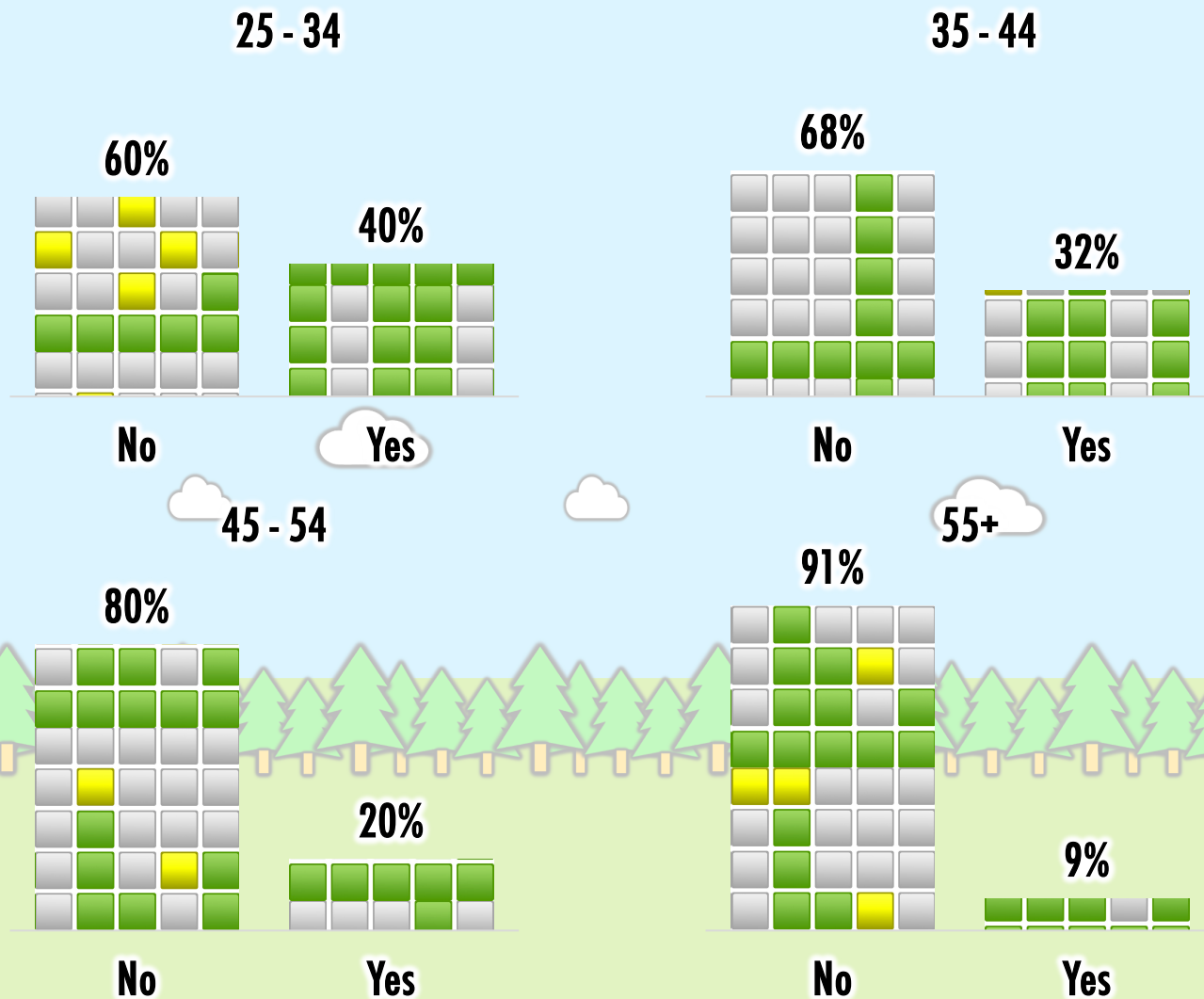
DO YOU SUBSCRIBE TO A GAMING SERVICE?

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Gaming subscriptions are predominantly a young person's game. This could be driven by the fact that gaming subscription is a relatively new idea.

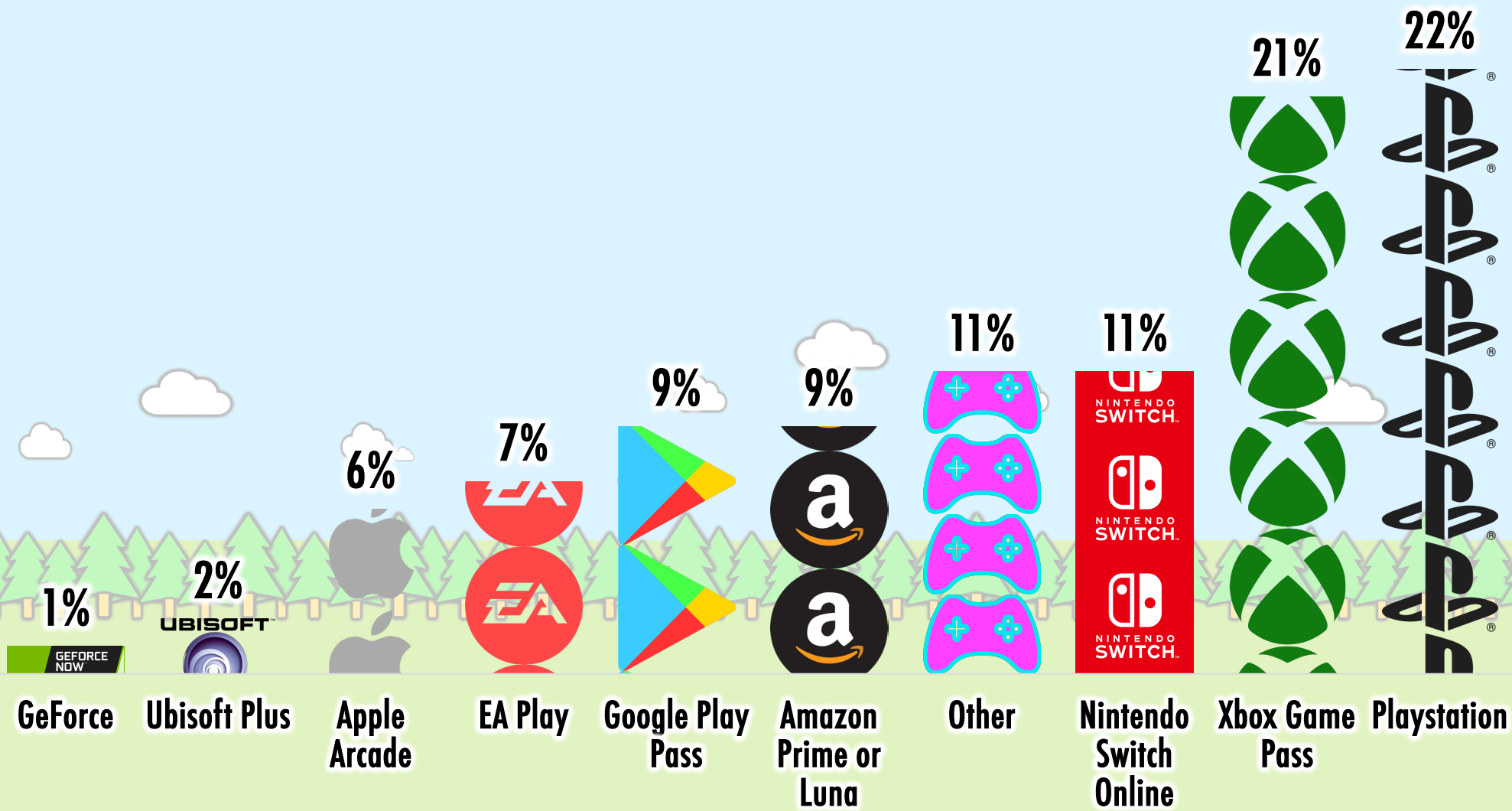
**37% OF A25-44
SUBSCRIBE TO
GAMING SERVICES**

**LESS THAN 10% OF
A45+ ARE GAMING
SUBSCRIBERS**



WHICH GAMING SERVICE DO YOU SUBSCRIBE TO?

n= 7,653 (RESPONDENTS WHO SUBSCRIBE TO GAMING SERVICES) | SOURCE: PCH INSIGHTS | CHART: ESHAP



DO YOU REGULARLY STREAM GAMING CONTENT?

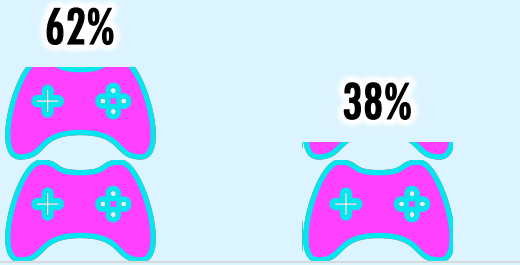
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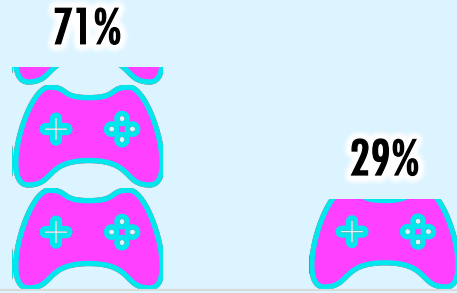
25 - 34



No

Yes

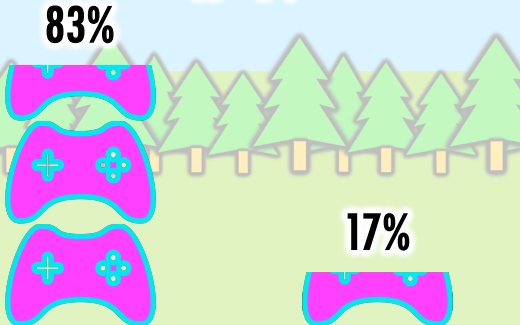
35 - 44



No

Yes

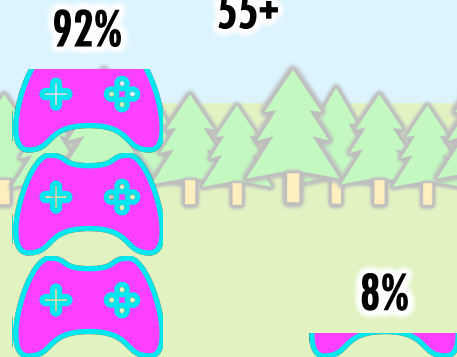
45 - 54



No

Yes

55+



No

Yes

Streaming video of gaming content is yet another game for young gamers.

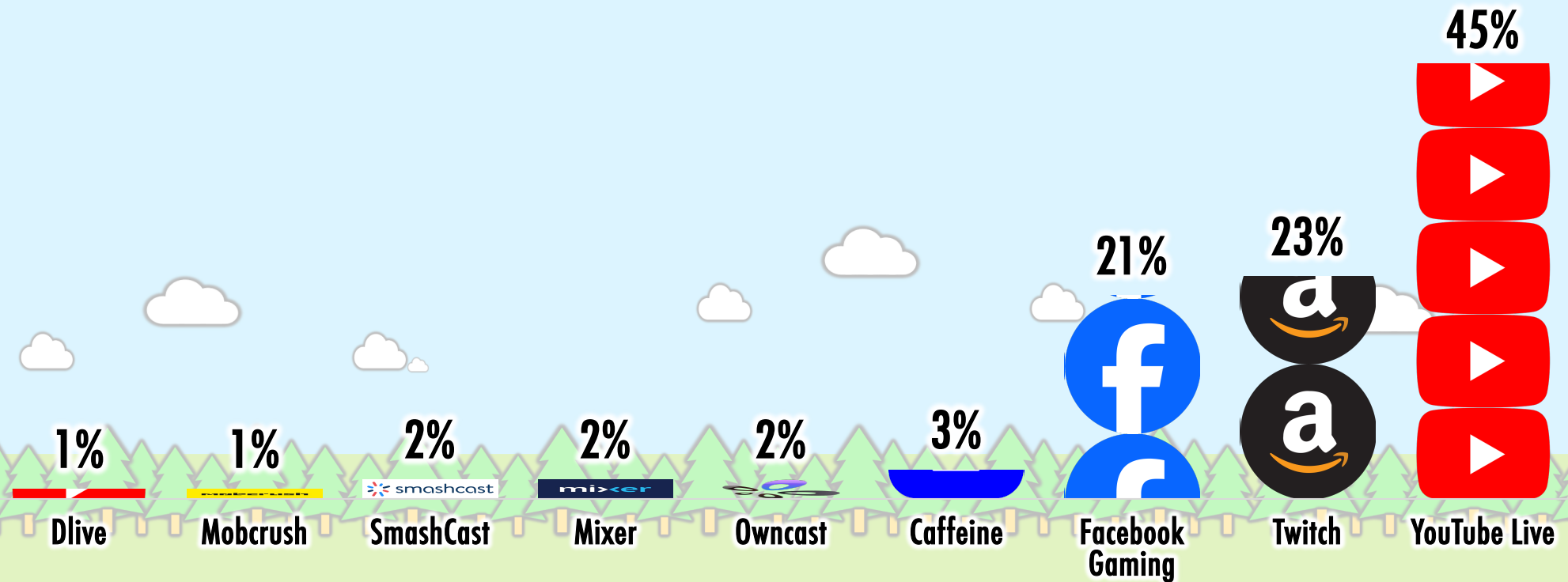
ONE-THIRD OF A25-44 STREAM VIDEO GAME CONTENT.

LESS THAN 15% OF A45+ STREAM GAMING VIDEO.

HOW DO YOU WATCH GAMING CONTENT?

n= 6,632 (RESPONDENTS WHO DO WATCH GAMING VIDEO CONTENT) | SOURCE: PCH INSIGHTS | CHART: ESHAP

YOUTUBE LIVE IS ADULT GAMERS' MOST USED STREAMING PLATFORM.



AMONG ADULT GAMERS IN THE US, YOUTUBE LIVE IS NOW BIGGER THAN FACEBOOK GAMING & TWITCH COMBINED

CONCLUSIONS:

If you work in Media, gaming is a sector that you should definitely be tracking. Adaptations and spin-offs such as Sonic, Mario Brothers, The Witcher and The Last Of Us prove the power of gaming IP.

More importantly, the majority of adults, with growing expendable income to spend, are spending more and more of their free time in games, and advertisers are spending more and more of their money on gaming platforms.

Most adults in the US are gamers. And at least half of those gamers are women. As our data shows, much of the truth about gaming is unexpected, or counter to mainstream conventional wisdom. Think about yourself. Do you play Wordle? Trivia games? Candy Crush? Then you are a gamer too.

METHODOLOGY:

This report represents an unbiased view of adults 25+ in the US from 68,760 weighted respondents. PCH holds a direct relationship with these respondents, who willingly engage in surveys as part of their strong engagement with the brand.

PCH Consumer Insights recruited respondents from Publishers Clearing House's 15 million registered Audience Members, in 3Q 2023. The total responses were then weighted demographically to be in line and represent a US Census population.

ABOUT THE AUTHORS:

Publishers Clearing House:

Publishers Clearing House (PCH) Consumer Insights is leading the consumer insights market through safe, efficient, high-quality direct brand surveys, helping marketers, brands, publishers, agencies, and researchers gain visibility into consumer interests and behaviors. Fueled by the 15M highly engaged users who participate in PCH's experiences, PCH Consumer Insights connects brands with real, registered people who willingly provide accurate zero-party data and survey responses. PCH has one of the largest authenticated audiences outside of the major social platforms which allows PCH Consumer Insights to provide privacy-first, personalized campaigns that detect fraud and bots and yield exceptionally accurate data and insights. PCH Consumer Insights offers a comprehensive suite of offerings across the entire research process, with survey design, programming and hosting, sampling, research and consulting. With 4 million surveys completed in the offering's first year in-market, the company is quickly building expertise across a vast number of subjects. Please contact InsightsInfo@pch.com for more information about PCH Consumer Insight's offerings.

ESHAP:

The official, unofficial cartographer of the Media Universe, Evan Shapiro uses his specific point of view to chart Media's future through his essays on the [Media War & Peace Newsletter](#), and with his change agency, ESHAP. He also serves as a professor at New York University and Fordham University, as Board Chair for non-profit educational enterprise One Diverse Industry, and as co-host of the Cancel Culture Podcast.



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