

Google for Games

Upcoming Gaming Trends

February 2023



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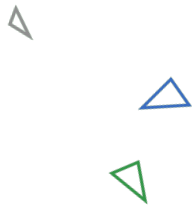
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Objectives

Understand how gamers perceive the future of games and the gaming industry.

Identify how players will interact with future gaming trends.

Methodology

18,029 male, female, and non-binary respondents, ages 18 to 87, participated in this study.

Within the target audience, all respondents:

- Are ages 18 and older
- Play games on a qualifying device* for at least 2 hours in a typical week
- Currently live in North America, Asia-Pacific, Europe, the Middle East and Africa, or Latin America


* Qualifying devices: Android phone, android tablet, iMac/MacBook, iPad, iPhone, Nintendo Switch, PlayStation 4, PlayStation 5, Steam Deck, Xbox One, Xbox Series X/S, Windows PC/laptop. Note: Detailed methodology and segmentation information can be found in the Methodology section at the end of the report.

EXECUTIVE SUMMARY

Upcoming
Gaming Trends

February 2023 Report

Participants anticipate a future for gaming that is strongly influenced by virtual reality and the metaverse



Most respondents say Virtual reality (76%) and the metaverse (71%) will be very or extremely influential in the future of gaming.

- Virtual reality has the highest awareness among global participants (**55%**), but only a lower percentage of participants that are aware of this technology currently engage with it (**27%**).
 - With **63%** of aware non-users being interested in using virtual reality in the future, usership of this technology is likely to grow more significantly in the future compared to other new and emerging technologies.
 - Participants that currently play virtual reality games say they most often do so because the technology is new and exciting (**51%**), because VR games allow them to interact with games in unique or realistic ways (e.g., using hands, looking around) (**49%**), because VR games are very immersive (**48%**), and/or since VR games are more thrilling than traditional games (**48%**).

Playing games in the metaverse is more appealing than any other metaverse activity, though some respondents have reservations about using this technology.

- Many participants are aware of the metaverse (**43%**), and this upcoming technology has the highest percentage of aware non-users that are interested in interacting with this technology in the future (**71%**).
- Among participants that are aware of the metaverse, respondents are most looking forward to playing games (**67%**), attending virtual events (e.g., concerts) (**47%**), hanging out with friends/socializing (**46%**), meeting new friends (**45%**), and/or accomplishing daily tasks (e.g., shopping) (**43%**).
 - Among participants that are aware of the metaverse, **29%** are not interested in using or interacting with it in the future. The most common reasons these respondents do not want to engage with this technology are because they do not want to spend money on equipment (**31%**), because they do not have any friends who are using it (**30%**), and/or they have privacy concerns (**26%**).

EXECUTIVE SUMMARY

Respondents also anticipate that play-to-earn games and cross-platform gameplay will be influential in gaming's future

Play-to-earn games (74%) and cross-platform gameplay (72%) will be very or extremely influential in the future of gaming, according to a majority of respondents.

- Among the **45%** of participants that are aware of play-to-earn games, **47%** currently engage with these kinds of games.
 - Among aware non-users, **57%** are interested in engaging with play-to-earn games in the future.
 - Respondents that currently engage with play-to-earn games most often do so on mobile devices (**85%**) as opposed to on a PC (**42%**); they most often do so to earn short-term cash/funds (**56%**), because they are interested in cryptocurrency/NFTs in general (**50%**), and/or the game itself is fun/engaging (**47%**).
- Most participants (**72%**) say they are more or much more likely to play a game if it supports cross-platform gameplay.
 - Respondents in the Asia Pacific express this sentiment most often among the regions (**78%**), while participants in North America express this sentiment least often (**62%**).
 - Cross-platform gameplay has the highest percentage of aware respondents that currently engage with this trend (**60%**).
 - Participants that currently engage with cross-platform gameplay most often do so to play with or against other players who are using different devices than they are (**76%**) as opposed to playing the same game across multiple devices (**51%**).
 - Among aware non-users, **51%** are interested in engaging with cross-platform gameplay in the future.



EXECUTIVE SUMMARY

Cloud gaming and augmented reality will have a strong influence on the future of gaming as well, according to survey participants

Most respondents expect that both cloud gaming (71%) and augmented reality (71%) will be very or extremely influential in the future of gaming.

- Of the **42%** of respondents that are aware of cloud gaming, **49%** currently interact with this technology.
 - Most participants that currently utilize cloud gaming say they somewhat or strongly prefer the experience of playing on the cloud compared to the standard gameplay experience (**54%**).
 - Respondents that currently engage with cloud gaming most often do so to access more games (**53%**), to save time with game downloads (**51%**), to play remotely (**41%**), and/or to have compatibility across devices (**38%**).
 - Among aware non-users, **53%** are interested in interacting with this technology in the future.
- Among the **48%** of participants that are aware of augmented reality games, **37%** of them currently interact with these kinds of games.
 - Among aware non-users, **44%** are interested in interacting with these kinds of games in the future.
 - Players that currently play augmented reality games most often do so because they like the idea of merging the digital and physical world in gaming (**49%**), because AR games turn real life into an adventure (**43%**), because AR games allow them to interact with games in unique ways (e.g., moving around to see a different view) (**43%**), and/or since the technology is new and exciting (**43%**).
 - Respondents that currently play augmented reality games most often play *Pokémon GO* (**76%**), *Harry Potter: Wizards Unite* (**32%**) and/or *The Walking Dead: Our World* (**29%**).



EXECUTIVE SUMMARY

Incorporating social features and cross-media integration result into games increases player interest

Most participants (58%) say social features/multiplayer modes make them more or much more likely to keep playing a game.

- Respondents in Latin America express this sentiment most often (64%), while respondents in North America express this sentiment least often among the different regions (46%).
- Among social features, respondents are most often interested in games adopting gifting options (28%) and competitive gameplay modes (28%).
 - Conversely, players most often say they dislike push notifications for other player's activity (20%), linking in-game accounts with social media (17%), and in-game voice chat (15%).

Most respondents (64%) also like seeing brands, properties, and characters from other media in games or like this a lot.

- Additionally, the majority of participants (65%) say having this kind of cross-media in gaming has a positive or very positive effect on their interest in playing a game.
- Most respondents (57%) say they are very or extremely interested in seeing elements from games they know in other types of media (e.g., shows, movies, books).



Global Insights

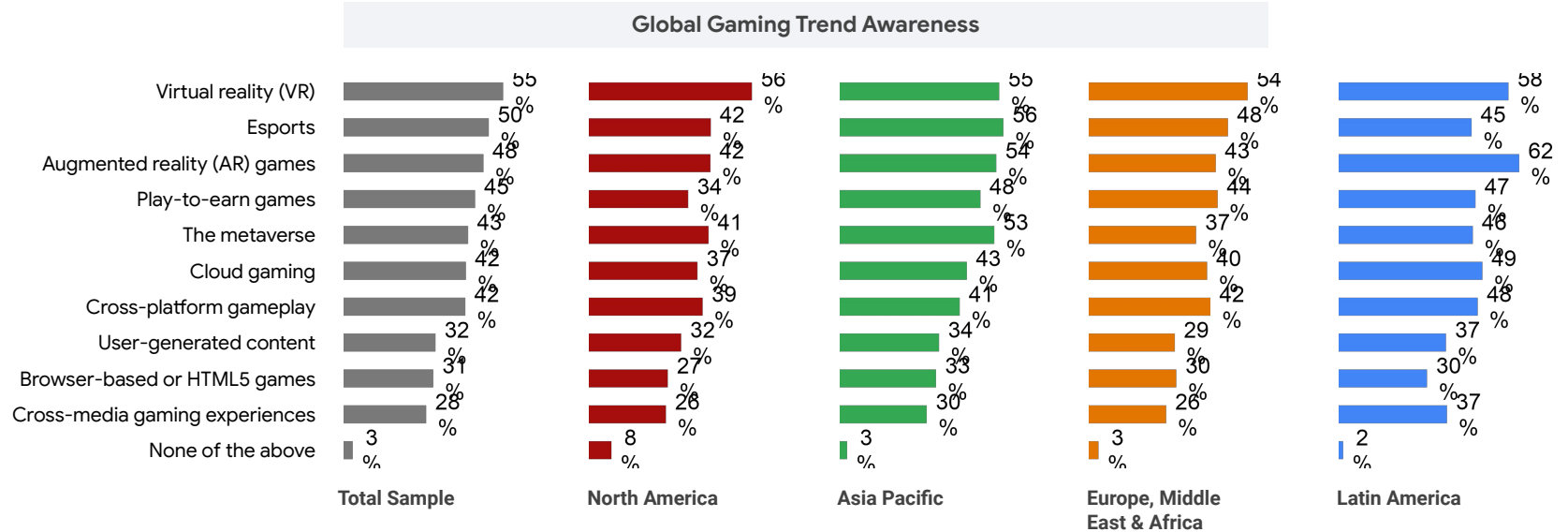
February 2023

Google for Games



Virtual reality (55%), esports (50%), and/or augmented reality (48%) boast the highest awareness among global participants

Many respondents are also aware of play-to-earn games (45%), the metaverse (43%), and/or cloud gaming (42%). In the Asia Pacific, esports captures the most awareness among these gaming trends (56%), and this region has the highest percentage of participants that are aware of the metaverse (53%) compared to other regions. In Latin America, augmented reality has the highest level of awareness (62%).



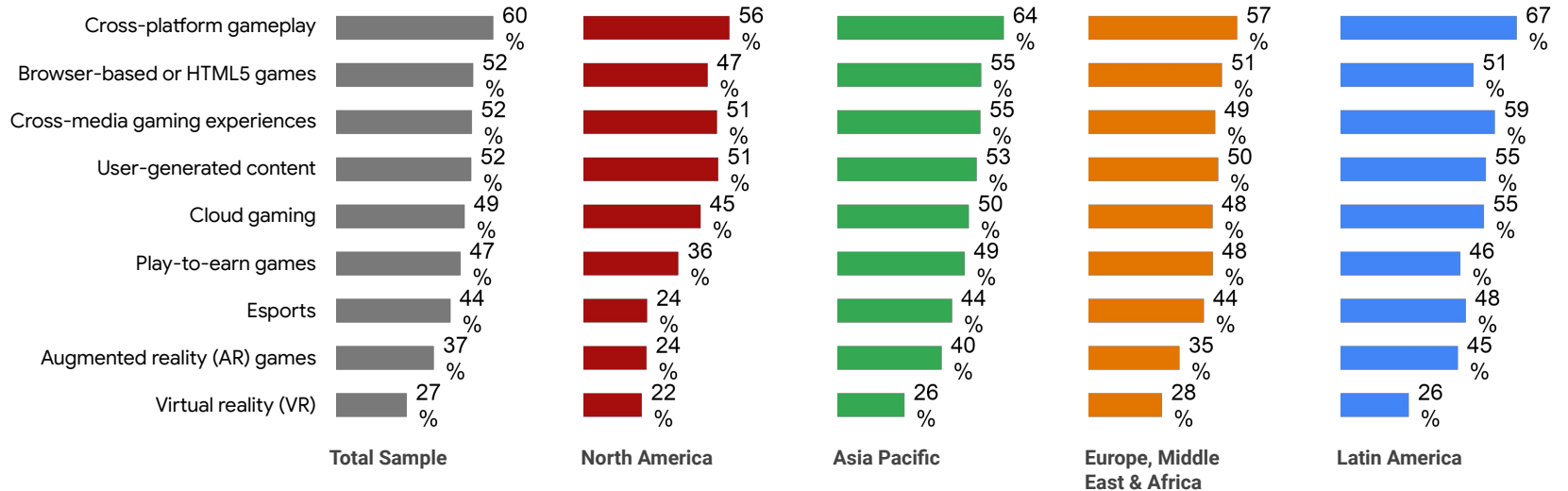
Q - Which of the following gaming trends have you heard of, if any? (Select all that apply.)
 Total Sample (n = 18,029); North America (n = 786); Asia Pacific (n = 5,708),
 Europe, Middle East & Africa (n = 10,098); Latin America (n = 1,437)



Cross-platform gameplay engages the highest percentage of its aware respondents (60%)

Browser-based or HTML5 games (52%), cross-media gaming experiences (52%), and user-generated content (52%) are also among the gaming trends with the highest engagement.

Global Gaming Trend Engagement



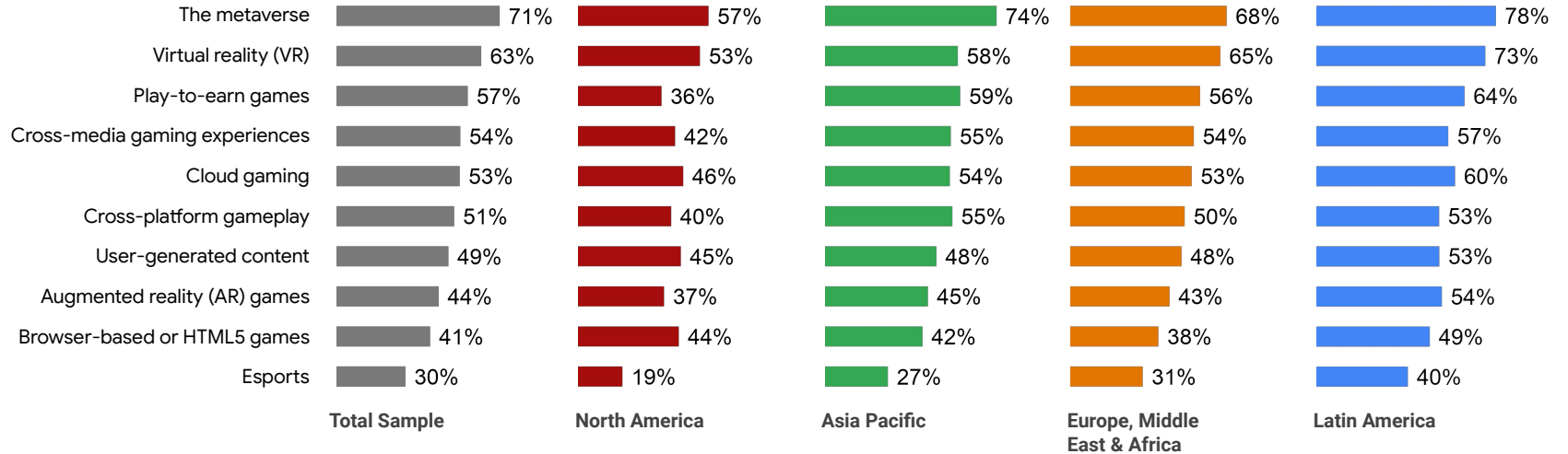
Asked among respondents that have heard of the respective gaming trend: Which of the following gaming trends do you currently use or interact with, if any? (Select all that apply.)
 Total Sample (n = various bases); North America (n = various bases); Asia Pacific (n = various bases);
 Europe, Middle East & Africa (n = various bases); Latin America (n = various bases)



Many participants that are aware of the metaverse are interested in interacting with it in the future (71%)

Interest in engaging with the metaverse is highest in Latin America (78%) and the Asia Pacific (74%). Among respondents that are aware of virtual reality but do not currently engage with it, 63% of them are interested in engaging with it in the future.

Global Engagement Interest Among Aware Non-Users

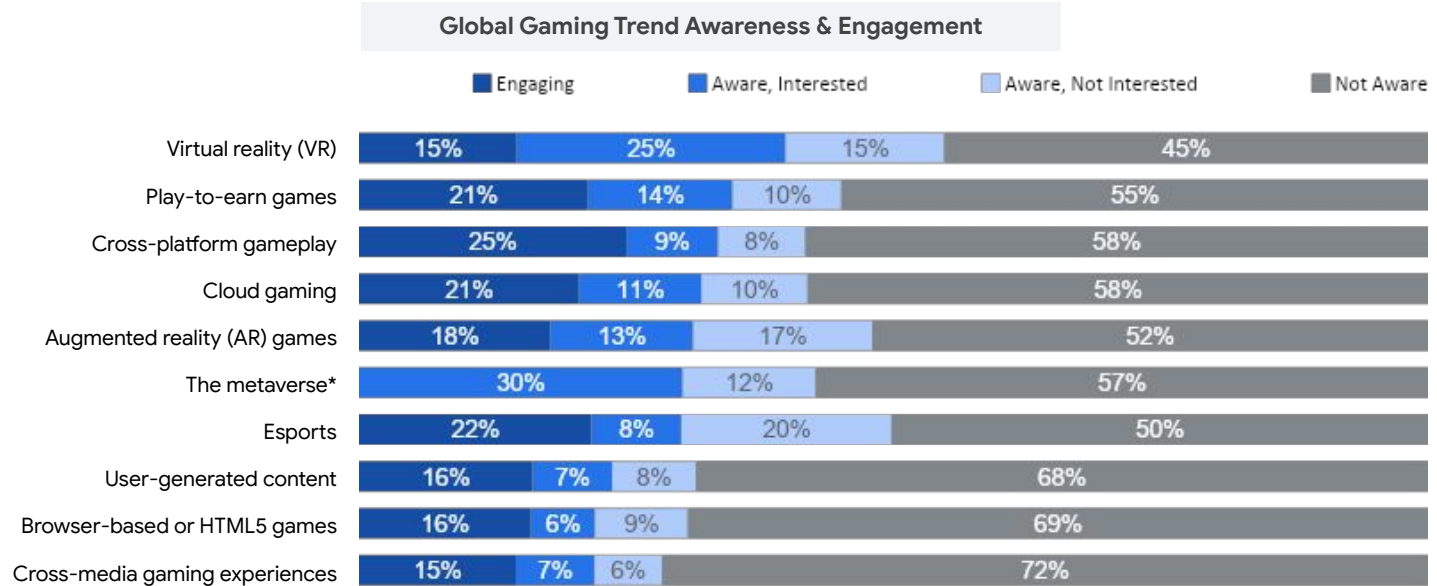


Asked among respondents that have heard of but are not using or interacting with the respective gaming trend, or have heard of the metaverse:
 Which of the following gaming trends are you interested in using or interacting with in the future, if any? (Select all that apply.)
 Total Sample (n = various bases); North America (n = various bases); Asia Pacific (n = various bases),
 Europe, Middle East & Africa (n = various bases); Latin America (n = various bases)



Esports (20%) and augmented reality games (17%) have the highest percentage of participants that are aware but are not interested

30% of all respondents are interested in engaging with the metaverse in the future while another 12% show no interest in the upcoming digital ecosystem.



Q - Which of the following gaming trends have you heard of, if any? (Select all that apply.)

Q - Which of the following gaming trends do you currently use or interact with, if any? (Select all that apply.)

Q - Which of the following gaming trends are you interested in using or interacting with in the future, if any? (Select all that apply.)

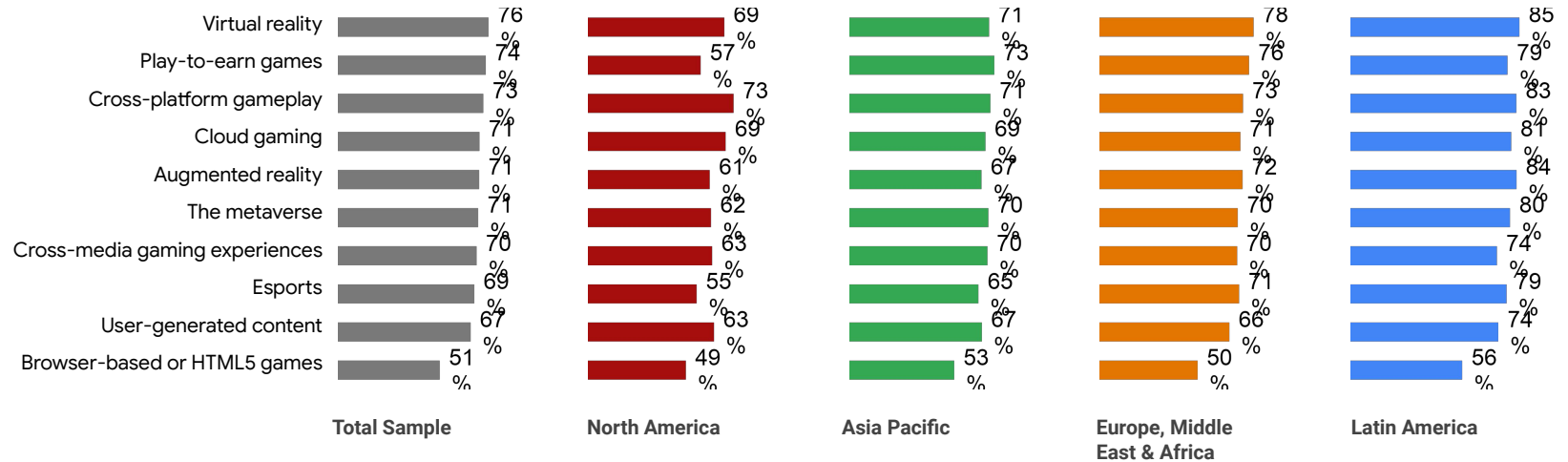
*The engagement questions was not asked for the metaverse because it does not exist at the time of this study. Total Sample (n = 18,029)



Respondents think virtual reality, play-to-earn games, and cross-platform gameplay will be most influential in the future of gaming

Respondents think virtual reality, play-to-earn games, and cross-platform gameplay will be most influential in the future of gaming

Influence on the Future of Gaming (% Extremely influential + Very influential)



Asked among respondents that have heard of the respective gaming trend: How influential do you think each of the following trends and/or technologies will be, if at all, in the future of gaming?

Total Sample (n = varying bases); North America (n = varying bases); Asia Pacific (n = varying bases); Europe, Middle East & Africa (n = varying bases); Latin America (n = varying bases)

Virtual reality players most often play these kinds of games because the technology is new and exciting (51%)

Virtual reality players also say they play these kinds of games because they allow them to interact with games in unique or realistic ways (49%) and because VR games are very immersive (48%). The most common VR devices that respondents use are the PlayStation VR (58%) and Samsung Gear VR (26%).

Reasons for Playing Virtual Reality Games



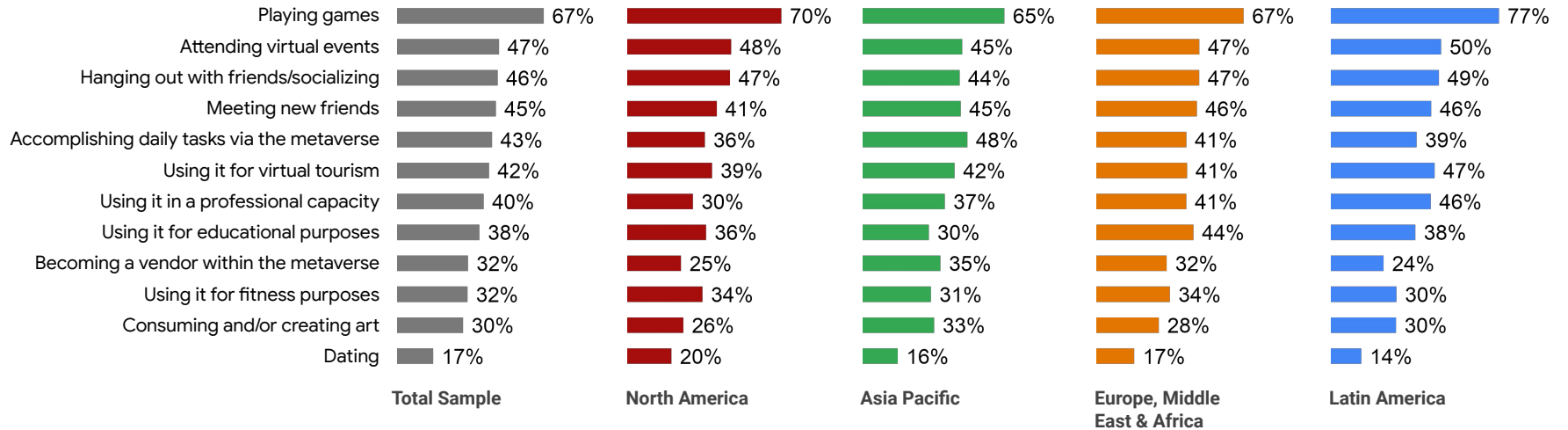
Asked among respondents that play VR games: Why do you play VR games? (Select all that apply.)
 Total Sample (n = 2,661); North America (n = 98); Asia Pacific (n = 800),
 Europe, Middle East & Africa (n = 1,546); Latin America (n = 217)



Respondents most often look forward to playing games (67%) and attending virtual events (47%) in the metaverse

Many participants are also interested in hanging out with friends/socializing (46%), meeting new friends (45%), and/or accomplishing daily tasks (43%) via the metaverse. Among respondents that are aware of the metaverse, 44% say they understand it very well or completely, while another 41% they somewhat understand the concept of the metaverse.

Metaverse Activity Interest



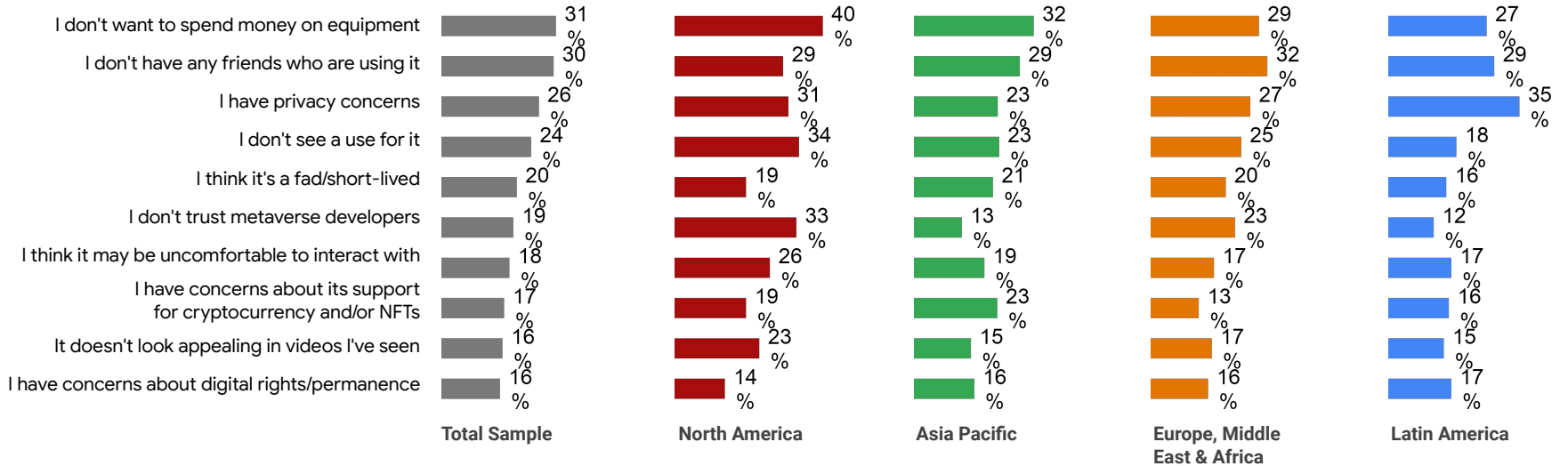
Asked among respondents that are interested in using or interacting with the metaverse in the future:
 What activities are you looking forward to in the metaverse? (Select all that apply.)
 Total Sample (n = 5,455); North America (n = 183); Asia Pacific (n = 2,245);
 Europe, Middle East & Africa (n = 2,515); Latin America (n = 512)



Participants most often say they are uninterested in engaging with the metaverse for financial and social reasons

Among respondents that are aware of the metaverse but are not interested in engaging with it, they are most often uninterested because they do not want to spend money on equipment (31%), because they do not have any friends who are using it (30%), and/or they have privacy concerns (26%).

Reasons for Not Engaging with the Metaverse



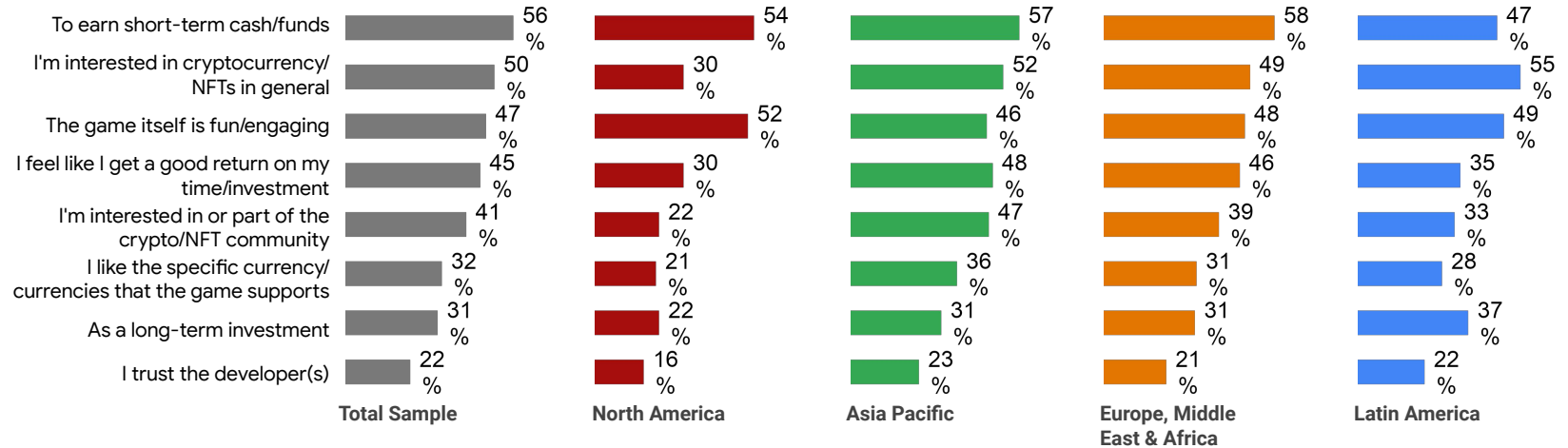
Asked among respondents that are aware of the metaverse but are not interested in using or interacting with it in the future:
 Why aren't you interested in engaging with the metaverse? (Select all that apply.)
 Total Sample (n = 2,248); North America (n = 140); Asia Pacific (n = 771),
 Europe, Middle East & Africa (n = 1,190); Latin America (n = 147)



Respondents that currently play play-to-earn games most often do so to earn short-term cash/funds (56%)

These participants also say they play play-to-earn games because they are interested in cryptocurrency/NFTs in general (50%), because the game itself is fun/engaging (47%), and/or they feel like they get a good return on their time/investment (45%). Respondents that engage with play-to-earn games do so most often on a mobile device (85%), while a lower percentage engage with these kinds of games on a PC (42%).

Reasons for Engaging with Play-to-Earn Games



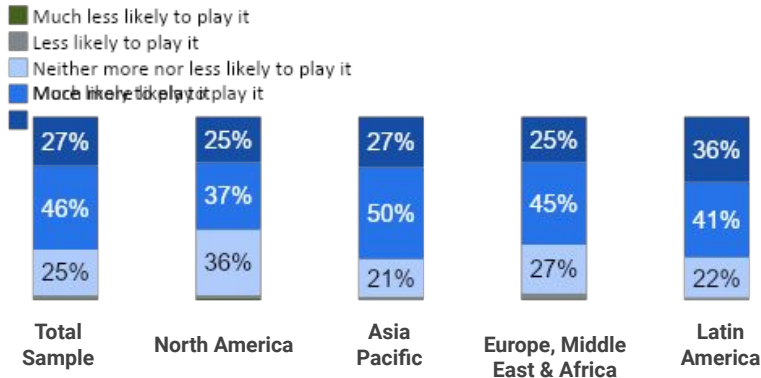
Asked among respondents that currently engage in play-to-earn games:
 Why do you play the play-to-earn game(s) that you do (e.g., in general, over others)? (Select all that apply.)
 Total Sample (n = 3,863); North America (n = 97); Asia Pacific (n = 1,339);
 Europe, Middle East & Africa (n = 2,120); Latin America (n = 307)



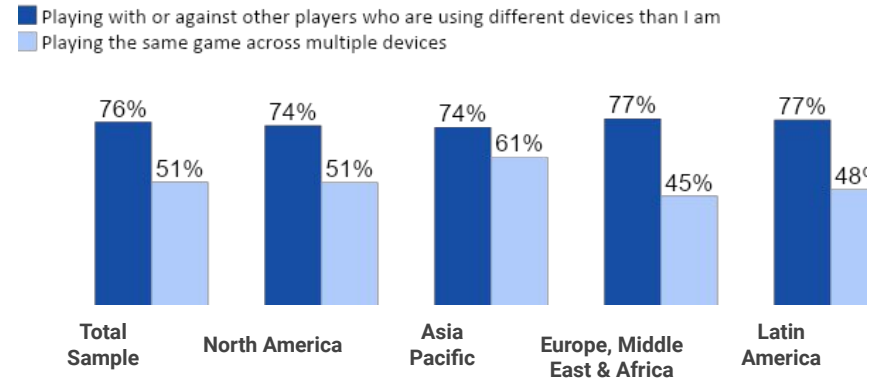
Most participants (72%) say they are more or much more likely to play a game if it supports cross-platform gameplay

Respondents in the Asia Pacific express this sentiment most often among the regions (78%), while participants in North America express this sentiment least often (62%). Cross-platform gameplay users most often use this function to play with or against other players who are using different devices than they are (76%), while a lower percentage use it to play the same game across multiple devices (51%).

Cross-platform Gameplay Support Influence on Game Engagement*



Ways to Engage with Cross-Platform Gameplay**



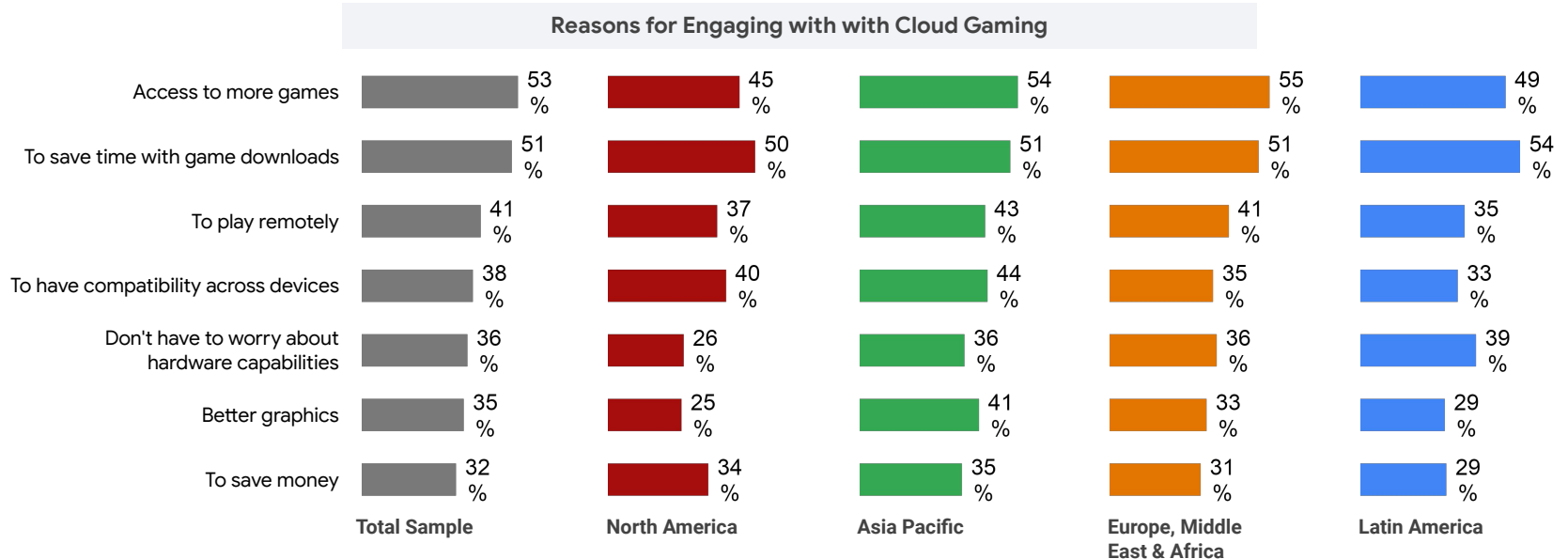
*Asked among respondents that have heard of cross-platform gameplay: Are you any more or less likely to play a game that supports cross-platform gameplay? If a game supports cross-platform gameplay, I'm usually...
Total Sample (n = 7,531); North America (n = 307); Asia Pacific (n = 2,341); Europe, Middle East & Africa (n = 4,200); Latin America (n = 683)

**Asked among respondents that currently play games with cross-platform gameplay: You said that you currently engage with cross-platform gameplay. In which ways do you do this? (Select all that apply.)
Total Sample (n = 4,513); North America (n = 171); Asia Pacific (n = 1,492); Europe, Middle East & Africa (n = 2,391); Latin America (n = 459)



Respondents that use cloud gaming most often do so to have access to more games (53%) and to save time with game downloads (51%)

Among respondents that currently utilize cloud gaming, over half of participants (54%) say they somewhat or strongly prefer the experience of playing on the cloud compared to the standard gameplay experience (i.e., an installed game). The devices most commonly used to engage with cloud gaming are an Android phone (50%) and a Windows PC/Laptop (46%).



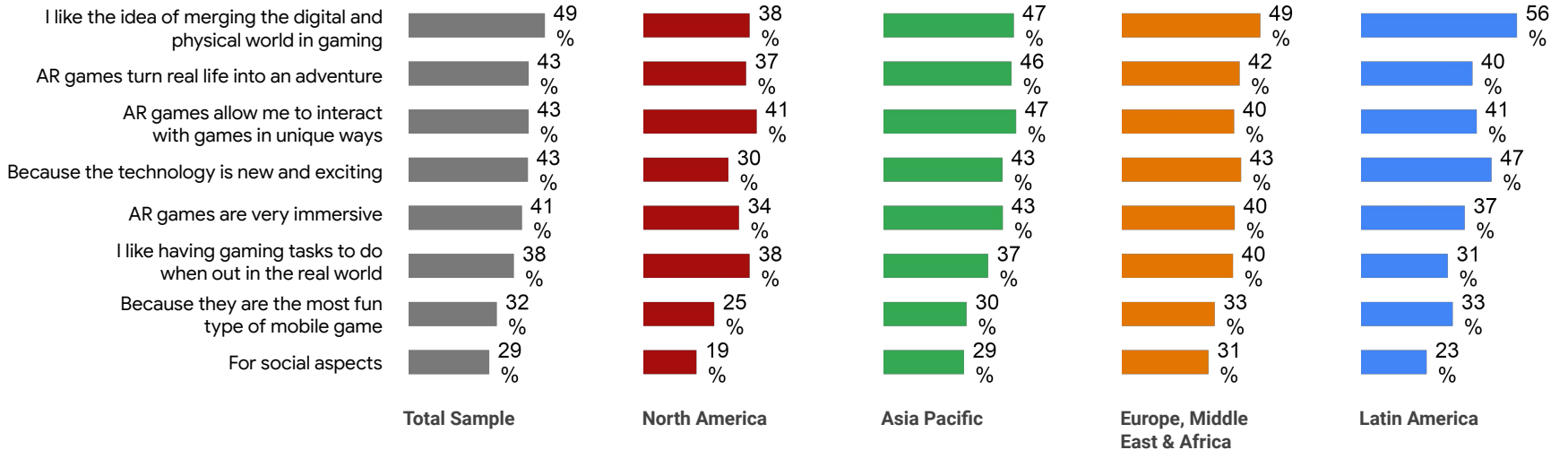
Asked among respondents that currently utilize cloud gaming: Why do you engage with cloud gaming? (Select all that apply.)
 Total Sample (n = 3,709); North America (n = 131); Asia Pacific (n = 1,249), Europe, Middle East & Africa (n = 1,943); Latin America (n = 386)



Augmented reality players most often play these kinds of games because they like merging the digital and physical world (49%)

Other common reasons cited by players that choose to play augmented reality games are because these games turn real life into an adventure (43%), because these kinds of games allow them to interact with games in unique ways (43%), and/or since the technology is new and exciting (43%).

Reasons for Engaging with Augmented Reality Games



Asked among respondents that play AR games: Why do you play augmented reality games? (Select all that apply.)

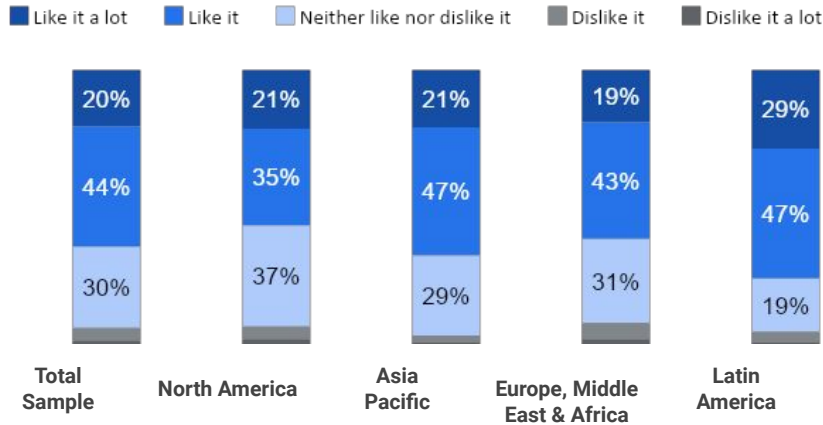
Total Sample (n = 3,224); North America (n = 79); Asia Pacific (n = 1,220); Europe, Middle East & Africa (n = 1,528); Latin America (n = 397)



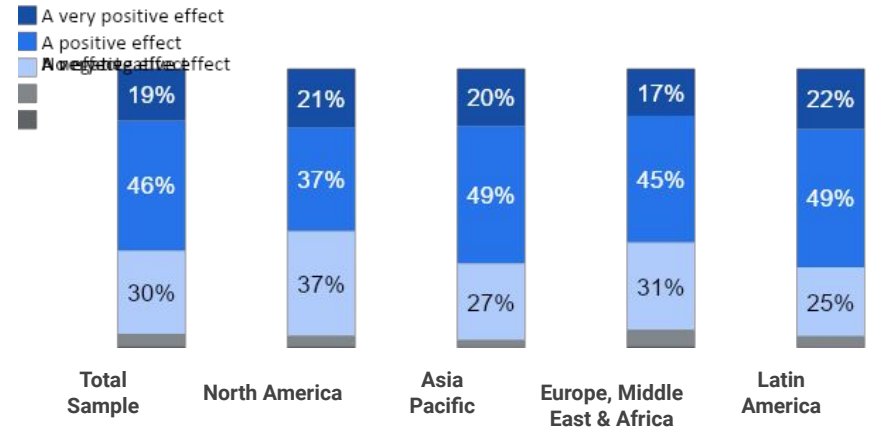
Most participants (64%) like seeing brands, properties, and characters from other media in games or say they like this a lot

A higher percentage of participants in Latin America (76%) and the Asia Pacific (68%) like seeing brands, properties, and characters from other media in games or say they like this a lot compared to the percentage of respondents in North America (57%) and Europe, the Middle East, and Africa (61%) that say the same. The majority of respondents (65%) say that having brands, properties, and/or characters from other media in a game has a positive or very positive effect on their interest in playing a game.

Cross-Media in Games Sentiment



Cross-Media Effect on Play Interest

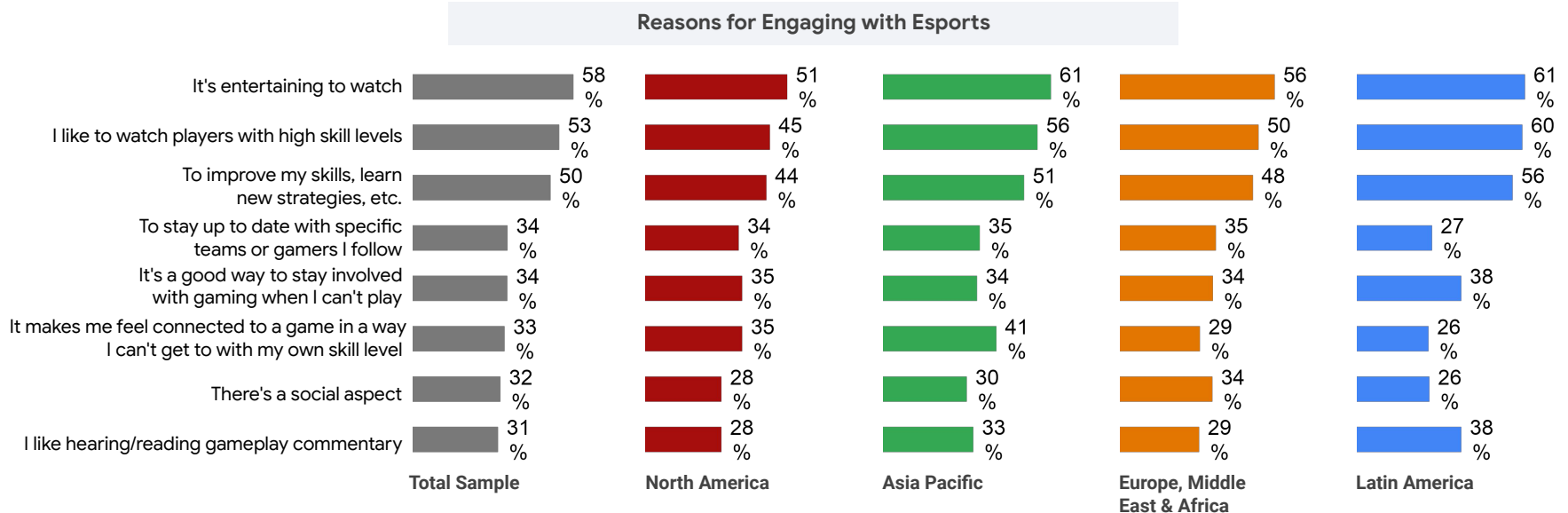


Q - In general, how much do you like or dislike seeing brands, properties, and characters from other media in games?
 Q - How does having brands, properties, and/or characters from other media in a game affect your interest in playing that game? This usually has _____ on my interest in playing a game.
 Total Sample (n = 18,029); North America (n = 786); Asia Pacific (n = 5,708),
 Europe, Middle East & Africa (n = 10,098); Latin America (n = 1,437)



Participants that engage with esports most often do so because it is entertaining to watch (58%)

Other common reasons that respondents engage with esports are because they like to watch players with high skill levels (53%) and/or to improve their skills, learn new strategies, etc. (50%). Respondents that currently engage with esports most often do so by watching streams on YouTube (68%), playing esports games (59%), following esports news (48%), and/or following teams/gamers on social media (44%).

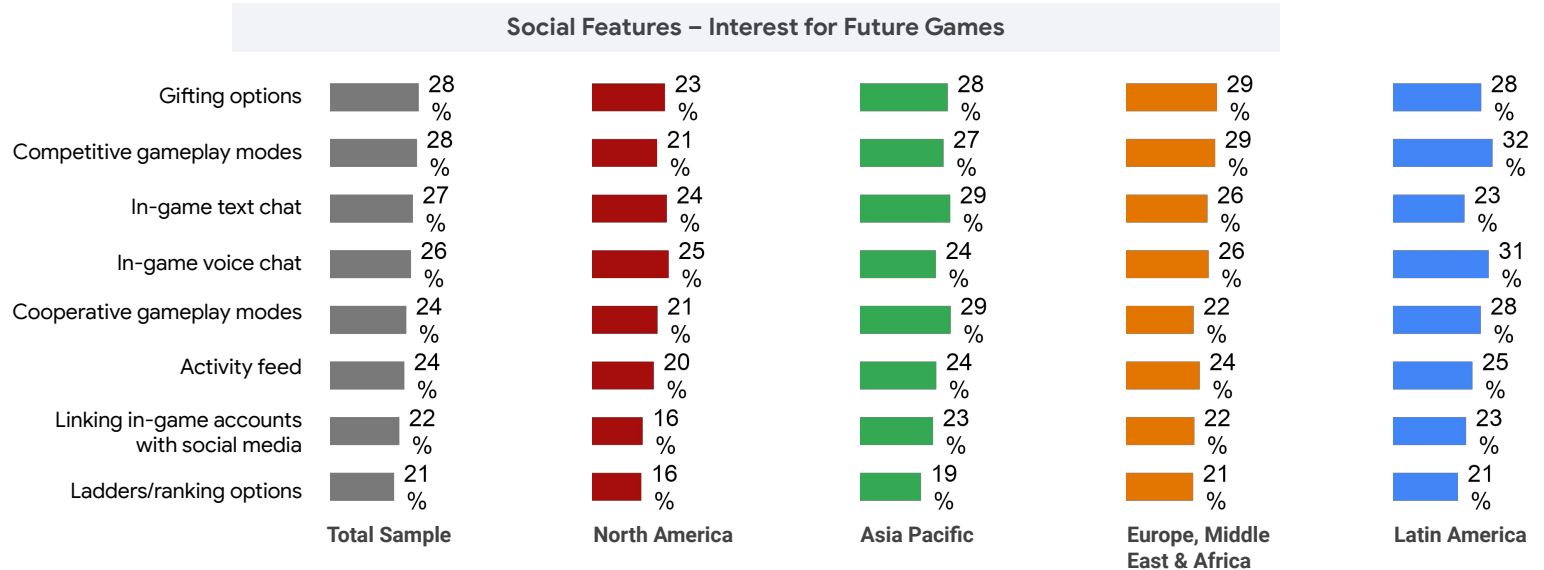


Asked among respondents that currently engage with esports: Why do you engage with esports? (Select all that apply.)
 Total Sample (n = 3,920); North America (n = 80); Asia Pacific (n = 1,403),
 Europe, Middle East & Africa (n = 2,125); Latin America (n = 312)



Among social features, respondents are most often interested in games adopting gifting options (28%) and competitive gameplay modes (28%)

Conversely, players most often say they dislike push notifications for other players' activity (20%), linking in-game accounts with social media (17%), and in-game voice chat (15%).



Asked among respondents that play games with social and/or multiplayer elements rarely or more often:

What additional social features would you like to see more games adopt, if any? (Select up to five.)

Note: Only the top 8 options selected by participants are shown above.

Total Sample (n = 16,811); North America (n = 672); Asia Pacific (n = 5,329);

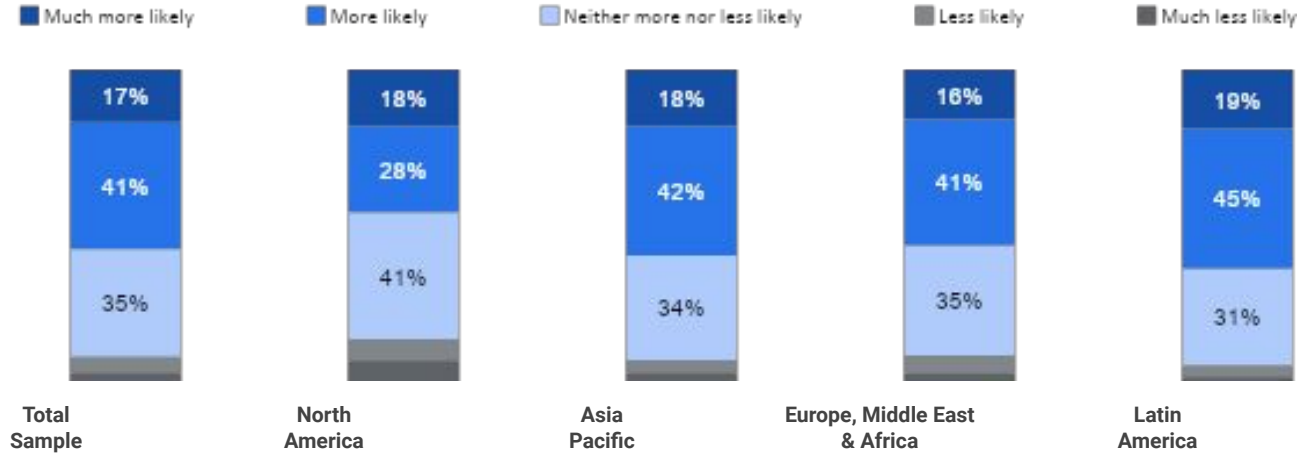
Europe, Middle East & Africa (n = 9,428); Latin America (n = 1,382)



Most participants (58%) say social features/multiplayer modes make them more or much more likely to keep playing a game

Respondents in Latin America express this sentiment most often (64%), while respondents in North America express this sentiment least often among the different regions (46%).

Likelihood of Social Features & Multiplayer Modes Inclusion to Effect Game Retention



Q - In general, how do social features/multiplayer modes affect how likely you are to keep playing a game?

Social features/multiplayer make me _____ to keep playing a game.

Total Sample (n = 18,029); North America (n = 786); Asia Pacific (n = 5,708),

Europe, Middle East & Africa (n = 10,098); Latin America (n = 1,437)

Global Insights

North America

February 2023

Google for Games



VIRTUAL REALITY

North America

Awareness

56%

Engagement Among Aware

22%

Interest of Aware Non-Users

53%

Influence on Future of Gaming

69%

- In North America, virtual reality has the highest awareness among all the gaming trends listed (**56%**).
 - Among participants that are aware of virtual reality, **22%** are currently using it.
 - Virtual reality usage is higher among PC/Console Players (**27%**) than Mobile Players (**17%**), and is also higher among Heavy Players (**38%**) and Medium Players (**30%**) than Light Players (**13%**).
 - Among respondents that have heard of virtual reality but are not currently using it, **53%** say they are interested in using it in the future.
 - Ages 35-44 (**61%**) and ages 18-34 (**57%**) have a higher percentage of virtual reality aware non-users that are interested in trying it in the future compared to ages 45-54 (**50%**) and ages 55+ (**45%**).
- Most North American participants (**69%**) that are aware of virtual reality think it will be very or extremely influential in the future of gaming.
- PlayStation VR (**45%**) and the Meta Quest 2 (**30%**) are the most commonly used virtual reality devices among North American participants.
- Respondents in North America that play VR games most often play them because the technology is new and exciting (**47%**), because they allow them to be physically active while gaming (**46%**), because VR games allow them to interact with games in unique or realistic ways (**44%**), and because VR games are more thrilling than traditional games (**44%**).
- North American participants that play VR games most often do so between 2-4 hours a week (**51%**).



THE METAVERSE

North America

Awareness

41%

Engagement Among Aware

N/A

Interest of Aware Non-Users

57%

Influence on Future of Gaming

62%

- Among participants in North America that are aware of the metaverse (41%), 57% are interested in engaging with it in the future.
- Most respondents in North America (62%) that are aware of the metaverse think that it will be very or extremely influential in the future of gaming.
 - A higher percentage of Heavy Players think the metaverse will be very or extremely influential in the future of gaming (79%) compared to the percentage of Light Players (55%) and Medium Players (61%) that say the same.
 - Similarly, a higher percentage of Players with Disabilities think the metaverse will be very or extremely influential in the future of gaming (79%) compared to the percentage of Non-Disabled Players that say the same (60%).
- Among respondents that have heard of the metaverse, almost half (47%) of North American participants say they understand the metaverse very well or completely, while many of them (39%) say they somewhat understand it.
- Among participants that are interested in using or interacting with the metaverse in the future, they are most often looking forward to playing games (70%), attending virtual events (e.g., concerts) (48%), hanging out with friends/socializing (47%), and/or meeting new friends (41%) in the metaverse.
- Among respondents that are aware of the metaverse but are not interested in using or interacting with it in the future, the most common reasons that they are not interested in it are because they do not want to spend money on equipment (40%), they do not see a use for it (34%), they do not trust metaverse developers (e.g., Meta/Facebook) (33%), and/or they have privacy concerns (31%).



PLAY-TO-EARN GAMES

North America

Awareness

34%

Engagement Among Aware

36%

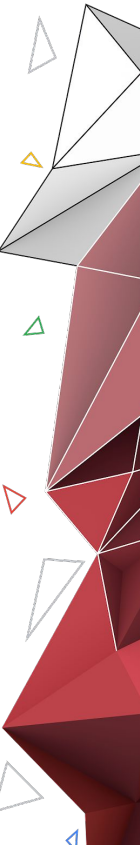
Interest of Aware Non-Users

36%

Influence on Future of Gaming

57%

- Among the 34% of North American participants that have heard of play-to-earn games (e.g., NFTs, crypto), 36% of them currently engage with these kinds of games.
 - Engagement with play-to-earn games is more common among Mobile Players (46%) than it is among PC/Console Players (27%).
 - Among the age segments, engagement with play-to-earn games is most common among ages 35-44 (40%) and ages 45-54 (39%), while it is lowest among ages 55+ (21%).
- Among respondents that are aware of play-to-earn games but are not currently engaging with these games, 36% of them are interested in engaging with this kind of gaming in the future.
 - Among aware non-users, Heavy Players show the most interest in engaging with play-to-earn games in the future (65%), while Light Players (20%) and Medium Players (39%) are less often interested in interacting with this trend in the future.
- Most participants (57%) that are aware of play-to-earn games say anticipate that these games will be very or extremely influential in the future of gaming.
- Participants that currently engage in play-to-earn games most often do so to earn short-term cash/funds (54%), because the game itself is fun/engaging (52%), because they are interested in cryptocurrency/NFTs in general (30%), and/or they feel like they get a good return on their time/investment (30%).
- Among respondents that engage with play-to-earn games, they do so more often on mobile devices (92%) than on a PC (18%).



CROSS-PLATFORM GAMEPLAY

North America

Awareness

39%

Engagement Among Aware

56%

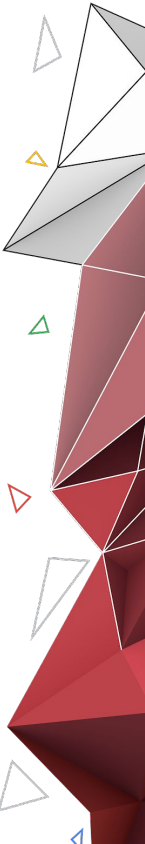
Interest of Aware Non-Users

40%

Influence on Future of Gaming

73%

- Among the **39%** of North America participants have heard of cross-platform gameplay, **56%** currently use this functionality, making it the most commonly used gameplay trend among the ones listed.
 - Among cross-platform gameplay aware respondents, **73%** say cross-platform gameplay will be very or extremely influential in the future of gaming.
 - A higher percentage of respondents ages 18-34 currently use cross-platform gameplay (**72%**) compared to ages 35-44 (**46%**), ages 45-54 (**51%**), and ages 55+ (**20%**).
- Among respondents that have heard of cross-platform gameplay but are not currently using it, **40%** are interested in using it in the future, and interest is highest among ages 35-44 (54%) while other age segments rate interest between **29%-39%**.
- Most respondents in North America (**62%**) say they are more or much more likely to play a game if that game supports cross-platform gameplay.
 - Ages 18-34 have a higher percentage of participants that say they are more or much more likely to play a game if it supports cross-platform gameplay (**76%**) compared to ages 35-44 (**56%**) and ages 45-54 (**51%**).
- Across all segments in North America, participants engage with cross-platform gameplay to play with or against other players who are using different devices more often than using it to play the same game across multiple devices.
- Cross-platform gameplay usage is more common among Heavy Players (**81%**) compared to Medium Players (**52%**) and Light Players (**44%**).



CLOUD GAMING

North America

Awareness

37%

Engagement Among Aware

45%

Interest of Aware Non-Users

46%

Influence on Future of Gaming

69%

- Among the 37% of North American participants that have heard of cloud gaming, 45% currently play games this way.
- Among cloud gaming aware respondents, males (48%) have a higher percentage of participants that currently use cloud gaming compared to females (41%).
 - Similarly, ages 18-34 (51%) and ages 35-44 (53%) have a higher percentage of respondents that currently use cloud gaming compared to ages 45-54 (30%) and ages 55+ (31%).
- Among cloud gaming aware respondents, 69% say this technology will be very or extremely influential on the future of gaming.
- Among respondents that have heard of cloud gaming but are not currently using it, 46% are interested in using it in the future.
- Participants in North America that currently engage with cloud gaming most often do so to save time with game downloads (50%), to access more games (45%), and/or to have compatibility across devices (40%).
- Over half of respondents in North America (52%) that engage in cloud gaming say they somewhat or strongly prefer the experience of playing games on the cloud compared to the standard gameplay experience.



AUGMENTED REALITY

North America

Awareness

42%

Engagement Among Aware

24%

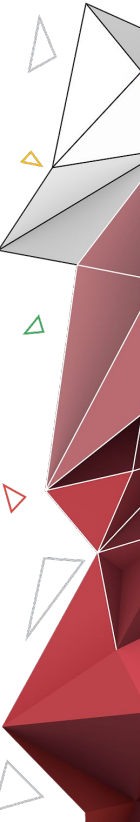
Interest of Aware Non-Users

37%

Influence on Future of Gaming

61%

- Among the **42%** of participants in North America that have heard of augmented reality games, **24%** currently engage with them.
 - A higher percentage of ages 18-34 (**33%**) and ages 35-44 (**35%**) currently engage with augmented reality games than the percentage of ages 45-54 (**16%**) and ages 55+ (**4%**) that engage with these types of games.
- Most respondents in North America that have heard of augmented reality, **61%** think that it will be very or extremely influential in the future of gaming.
 - A higher percentage of Heavy Players (**78%**) believe that augmented reality will be very or extremely influential in the future of gaming compared to the percentage of Light Players (**54%**) and Medium Players (**62%**) that say the same.
- Among respondents that have heard of augmented reality but are not using or interacting with it, **37%** of them are interested in engaging with it in the future.
 - Among augmented reality aware non-users, a higher percentage of males (**46%**) are interested in interacting with augmented reality in the future compared to the percentage of females that say the same (**29%**).
- Among participants that play augmented reality games, they most often do so because AR games allow them to interact with games in unique ways (e.g., moving around to see a different view) (**41%**), because they like having gaming tasks to do when out in the real world (**38%**), because they like the idea of merging the digital and physical world in gaming (**38%**), and/or since augmented reality games turn real life into an adventure (**37%**).



CROSS MEDIA GAMING
(IP & BRANDS)

North America

Awareness

26%

Engagement Among Aware

51%

Interest of Aware Non-Users

42%

Influence on Future of Gaming

63%

- Among the 26% of respondents in North America that are aware of cross-media gaming experiences, 51% currently interact with this trend.
 - A higher percentage of PC/Console Players interact with cross-media gaming experiences (55%) compared to the percentage of Mobile Players that do so (44%).
- Most North American participants (63%) that are aware of cross-media gaming experiences think it will be very or extremely influential in the future of gaming.
- Most respondents in North America (57%) say they like seeing brands, properties, and characters from other media in games or say they like this a lot.
 - A higher percentage of PC/Console players like seeing brands, properties, and characters from other media or like this a lot (63%) compared to the percentage of Mobile Players that say the same (50%).
 - Similarly, Heavy Players express a higher interest in cross-media gaming, with 84% of gamers in this segment saying they like this gaming trend or like it a lot compared to the percentage of Light Players (45%) and Medium Players (59%) that say the same.
- Most North American participants (58%) say having brands, properties, and/or characters from other media in a game has a positive or very positive effect on their interest in playing a game.
 - A higher percentage of ages 18-34 (73%) and ages 35-44 (69%) say cross-media has a positive or very positive effect on their interest to play a game compared to the percentage of ages 45-54 (56%) and ages 55+ (22%) that say the same.



ESPORTS

North America

Awareness

42%

Engagement Among Aware

24%

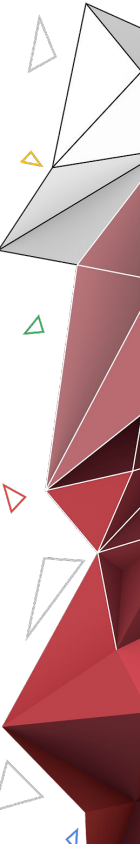
Interest of Aware Non-Users

19%

Influence on Future of Gaming

55%

- Among the 42% of participants in North America that are aware of esports, 24% currently engage with esports events or content.
 - Esports awareness is highest among Medium Players (47%), while awareness is lower among Light Players (41%) and Heavy Players (37%).
 - Esports engagement is highest among Heavy Players (46%) and Medium Players (31%), while it is lower among Light Players (13%).
- Among respondents that are aware of esports but are not currently interacting with it, only 19% are interested in interacting with it in the future.
- Over half of participants that are aware of esports (55%) say it will be very or extremely influential in the future of gaming.
 - Ages 18-34 (64%) have the highest percentage that express this sentiment among the age groups, while a lower percentage of ages 35-44 (53%) and ages 45-54 (49%) feel that esports will be very or extremely influential in the future of gaming.
- Respondents that currently engage with esports most often do so by watching streams on YouTube (61%), playing esports games (56%), following esports news (48%), and/or following teams/gamers on social media (45%).
 - Participants that currently engage with esports do so because it is entertaining to watch (51%), because they like to watch players with high skill levels (45%), and/or to improve their own skills/learn new strategies etc. (44%).
- Among participants that currently engage with esports, sports (64%), shooter games (51%), and fighting games (45%) are the most popular type of games that they follow in this manner.



USER-GENERATED CONTENT

North America

Awareness

32%

Engagement Among Aware

51%

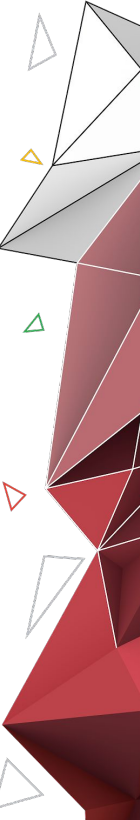
Interest of Aware Non-Users

45%

Influence on Future of Gaming

63%

- Among the **32%** of North American participants aware of user-generated content in gaming, **51%** currently engage with it.
 - Among user-generated content aware participants, a higher percentage of males (**57%**) currently interact with this gaming trend than females (**46%**), similarly a higher percentage of Heavy Players (**71%**) interact with this gaming trend than Medium Players (**43%**) and Light Players (**46%**).
- Most North American participants (**63%**) that are aware of user-generated content think it will be very or extremely influential in the future of gaming.
- Among respondents that are aware of user-generated content in gaming but do not currently engage with it, **45%** of them are interested in interacting with it in the future.
 - PC/Console Players have a higher percentage of aware non-users that are interested in engaging with user-generated content in the future (**53%**) compared to Mobile Players (**33%**), similarly, Heavy Players (**63%**) have a higher percentage of aware non-users that are interested in this gaming trend than Medium Players (**48%**) and Light Players (**34%**).
- Among respondents that engage with user-generated content, participants most often say they mostly play or use content created by others, but they also create a little bit of their own content (**37%**).
 - Another **26%** say they only play or use content created by others and that they do not create their own content.
 - Players that create their own content most often do so because it is fun (**56%**), they find it creatively fulfilling (**48%**), and/or since it is a way to keep playing a game they like and keep it interesting (**45%**).



Global Insights

Asia Pacific

February 2023



Asia Pacific

Awareness

55%

Engagement Among Aware

26%

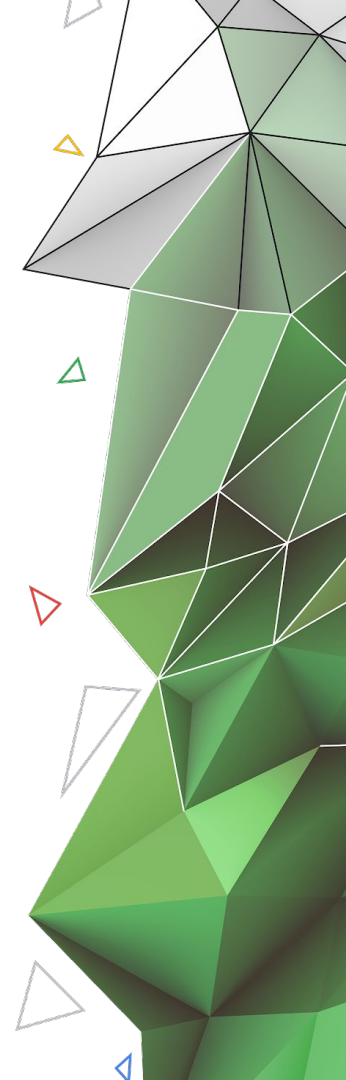
Interest of Aware Non-Users

58%

Influence on Future of Gaming

71%

- In the Asia Pacific, virtual reality has the second-highest awareness among all the gaming trends listed (**55%**).
 - Among participants that are aware of virtual reality, **26%** of them are currently using it.
 - Virtual reality usage is higher among PC/Console Players (**29%**) than Mobile Players (**22%**), and is also higher among Heavy Players (**42%**) than it is among and Light Players (**17%**) and Medium Players (**26%**).
- Among respondents that have heard of virtual reality but are not currently using it, **58%** are interested in using it in the future.
- Most participants in the Asia Pacific region that are aware of virtual reality think it will be very or extremely influential in the future of gaming (**71%**).
- PlayStation VR (**53%**) and the Samsung Gear VR (**25%**) are the most commonly used virtual reality devices among participants in the Asia Pacific region.
- Respondents in the Asia Pacific that play VR games most often play them because VR games are very immersive (**55%**), because VR games are more thrilling than traditional games (**53%**), because VR games allow them to interact with games in unique or realistic ways (**51%**), and/or since the technology is new and exciting (**47%**).
- Participants in the Asia Pacific that play VR games most often play games on this kind of device for 2-4 hours a week (**52%**).



Asia Pacific

Awareness

53%

Engagement Among Aware

N/A

Interest of Aware Non-Users

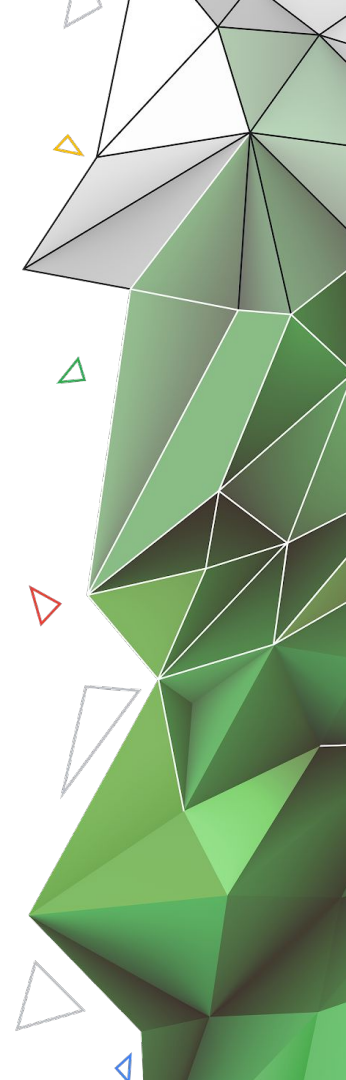
74%

Influence on Future of Gaming

70%



- Among the participants in the Asia Pacific that are aware of the metaverse (**53%**), **74%** are interested in engaging with it in the future, making it the gaming trend with the highest future interest among the trends listed.
- Most respondents in the Asia Pacific (**70%**) that are aware of the metaverse think that it will be very or extremely influential in the future of gaming.
 - A higher percentage of Heavy Players think the metaverse will be very or extremely influential in the future of gaming (**83%**) compared to the percentage of Light Players (**65%**) and Medium Players (**68%**) that say the same.
 - Similarly, a higher percentage of players with disabilities think the metaverse will be very or extremely influential in the future of gaming (**80%**) compared to the percentage of non-disabled players that say the same (**70%**).
- Among respondents that have heard of the metaverse, they most often say that they somewhat understand it (**42%**), while another **40%** say they understand it very well or completely.
- Among participants that are interested in using or interacting with the metaverse in the future, they are most often looking forward to playing games (**65%**), accomplishing daily tasks (e.g., shopping) (**48%**), attending virtual events (e.g., concerts) (**45%**), and/or meeting new friends (**45%**) in the metaverse.
- Among respondents that are aware of the metaverse but are not interested in using or interacting with it in the future, the most common reasons that they are not interested in it are because they do not want to spend money on equipment (**32%**), they do not have any friends who are using it (**29%**), they do not see a use for it (**23%**), and/or they have privacy concerns (**23%**).



Asia Pacific

Awareness

48%

Engagement Among Aware

49%

Interest of Aware Non-Users

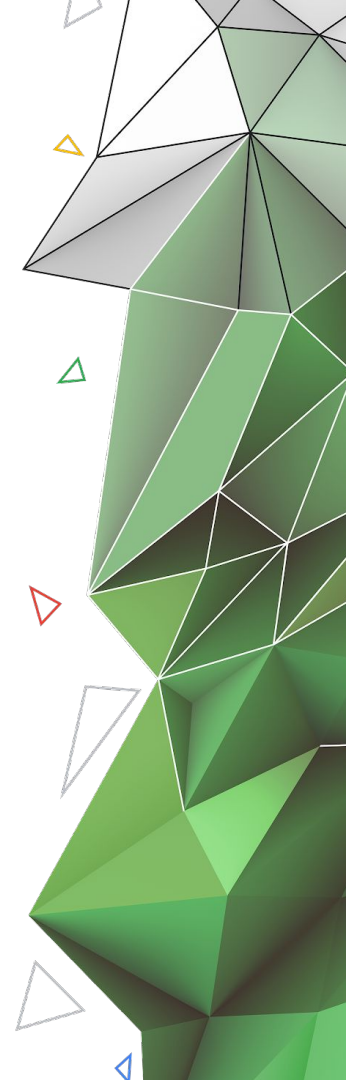
59%

Influence on Future of Gaming

73%



- Among the **48%** of participants in the Asia Pacific region that have heard of play-to-earn games (e.g., NFTs, crypto), **49%** of them currently engage with these kinds of games.
 - Engagement with play-to-earn games is more common among ages 18-34 (**50%**) and ages 35-44 (**51%**) than it is among ages 45-54 (**40%**) and ages 55+ (**37%**).
- Among respondents that are aware of play-to-earn games but are not currently engaging with these games, **59%** of them are interested in engaging with this kind of gaming in the future.
 - Among aware non-users, Heavy Players show the most interest in engaging with play-to-earn games in the future (**66%**), while Light Players (**52%**) and Medium Players (**62%**) are less often interested in interacting with this trend in the future.
- Most participants (**73%**) that are aware of play-to-earn games say they will be very or extremely influential in the future of gaming.
- Participants that currently engage in play-to-earn games most often do so to earn short-term cash/funds (**57%**), because they are interested in cryptocurrency/NFTs in general (**52%**), because they feel like they get a good return on their time/investment (**48%**), and/or they are interested in or are part of the crypto/NFT community (**47%**).
- While **54%** of respondents say they understand the concept of playing-to-earn very well or completely, another **34%** say they somewhat understand this concept.
- Among respondents that engage with play-to-earn games, they do so more often on mobile devices (**85%**) than on a PC (**49%**).



Asia Pacific

Awareness

41%

Engagement Among Aware

64%

Interest of Aware Non-Users

55%

Influence on Future of Gaming

71%

- Most respondents in the Asia Pacific region (**78%**) say they are more or much more likely to play a game if it supports cross-platform gameplay.
 - Ages 18-34 have a higher percentage of participants that say they are more or much more likely to play a game if it supports cross-platform gameplay (**81%**) compared to ages 35-44 (**76%**) and ages 45-54 (**66%**).
- Among the **41%** of participants in the Asia Pacific region have heard of cross-platform gameplay, **64%** currently use this functionality, making it the most commonly used gameplay trend among those listed.
 - Cross-platform gameplay usage is most common among ages 18-34 (**67%**) and ages 35-44 (**61%**), while it is less common among ages 45-54 (**57%**) and ages 55+ (**53%**).
- Among respondents that have heard of cross-platform gameplay but are not currently using it, **55%** are interested in using it in the future; interest is highest among Medium Players (**60%**) and Heavy Players (**67%**) while interest is least common among Light Players (**44%**).
- Among cross-platform gameplay aware respondents, **71%** say it will be very or extremely influential in the future of gaming.
- Participants that currently utilize cross-platform gameplay use it to play with or against other players who are using different devices (**74%**) more often than using it to play the same game across multiple devices (**64%**).

Asia Pacific

Awareness

43%

Engagement Among Aware

50%

Interest of Aware Non-Users

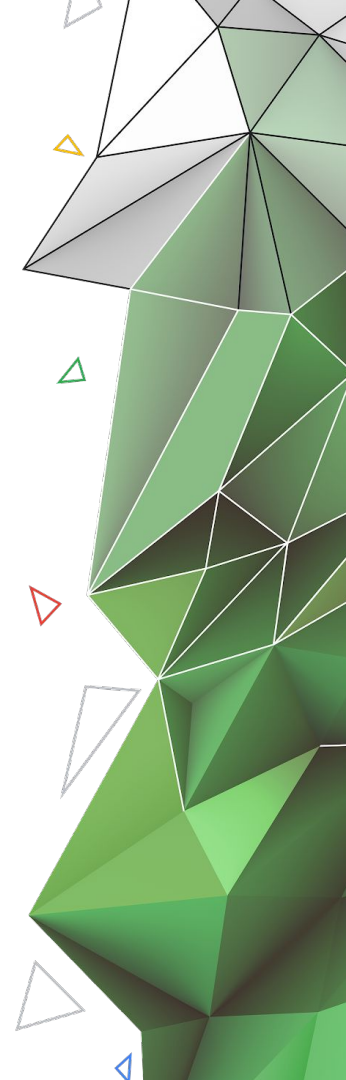
54%

Influence on Future of Gaming

69%



- Among the **43%** of participants in the Asia Pacific region have heard of cloud gaming, **50%** currently play games this way.
 - Among cloud gaming aware respondents, Heavy Players (**62%**) have a higher percentage of participants that currently use cloud gaming compared to Light Players (**44%**) and Medium Players (**48%**).
 - Similarly, PC/Console Players (**53%**) have a higher percentage of respondents that currently use cloud gaming compared to Mobile Players (**47%**).
- Among respondents that have heard of cloud gaming but are not currently using it, **54%** are interested in using it in the future.
- Among cloud gaming aware respondents, **69%** say this technology will be very or extremely influential on the future of gaming.
- Among participants that currently engage with cloud gaming, they most often do so to access more games (**54%**), to save time with game downloads (**51%**), and/or to have compatibility across devices (**44%**).
- Over half of respondents in the Asia Pacific (**57%**) say they somewhat or strongly prefer the experience of playing games on the cloud compared to the standard gameplay experience.
 - This sentiment is most common among ages 18-34 (**64%**), while it is less common among ages 35-44 (**50%**) and ages 45-54 (**43%**).



Asia Pacific

Awareness

54%

Engagement Among Aware

40%

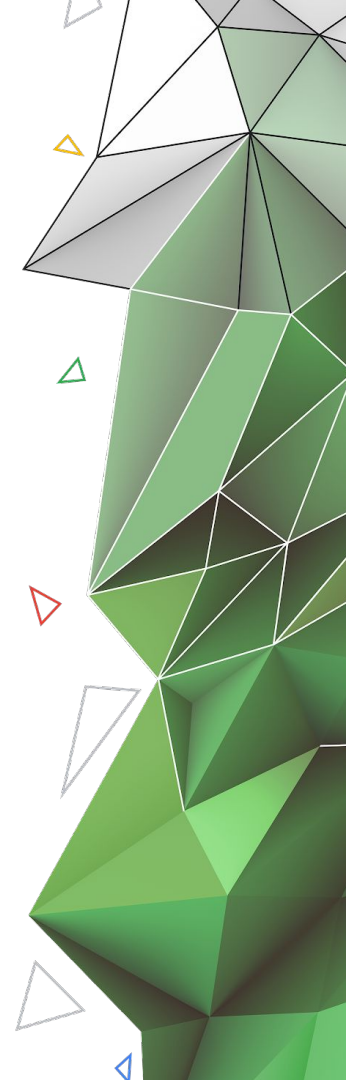
Interest of Aware Non-Users

45%

Influence on Future of Gaming

67%

- Among the 54% of participants in the Asia Pacific region that have heard of augmented reality games, 40% currently engage with these types of games.
 - A higher percentage of Heavy Players (55%) and Medium Players (43%) currently engage with augmented reality games than the percentage of Light Players (30%) that engage with them.
- Most respondents in the Asia Pacific that have heard of augmented reality (67%) think that it will be very or extremely influential in the future of gaming.
 - A higher percentage of Heavy Players (81%) say augmented reality will be very or extremely influential in the future of gaming compared to the percentage of Light Players (63%) and Medium Players (64%) that say the same.
- Among respondents that have heard of augmented reality but are not using or interacting with it, 45% of them are interested in engaging with it in the future.
 - Among augmented reality aware non-users, a higher percentage of players with disabilities (62%) are interested in interacting with augmented reality in the future compared to the percentage of non-disabled players that say the same (44%).
- Participants that play augmented reality games say they most often do so because these games allow them to interact with games in unique ways (e.g., moving around to see a different view) (47%), because they like the idea of merging the digital and physical world in gaming (47%), and/or since augmented reality games turn real life into an adventure (46%).



Asia Pacific

Awareness

30%

Engagement Among Aware

55%

Interest of Aware Non-Users

55%

Influence on Future of Gaming

70%

- Among the **30%** of respondents in the Asia Pacific region that are aware of cross-media gaming experiences, **55%** currently interact with this trend.
 - A higher percentage of Heavy Players interact with cross-media gaming experiences (**64%**) compared to the percentage of Medium Players (**52%**) or Light Players (**50%**) that interact with cross-media gaming experiences.
- Most participants in the Asia Pacific region (**70%**) that are aware of cross-media gaming experiences think it will be very or extremely influential in the future of gaming.
- Among respondents that are aware of cross-media gaming experiences but are not currently engaging with them, **55%** are interested in engaging with these kinds of experiences in the future.
- Most respondents in the Asia Pacific (**68%**) say they like seeing brands, properties, and characters from other media in games or say they like this a lot.
 - A higher percentage of ages 18-34 (**73%**) like seeing brands, properties, and characters from other media or like this a lot compared to the percentage of ages 35-44 (**66%**) and ages 45-54 (**56%**) that say the same.
- Most participants in the Asia Pacific (**70%**) say having brands, properties, and/or characters from other media in a game has a positive or very positive effect on their interest in playing a game.
 - A higher percentage of ages 18-34 (**75%**) and ages 35-44 (**67%**) say cross-media has a positive or very positive effect on their interest to play a game compared to the percentage of ages 45-54 (**59%**) and ages 55+ (**44%**) that say the same.

Asia Pacific

Awareness

56%

Engagement Among Aware

44%

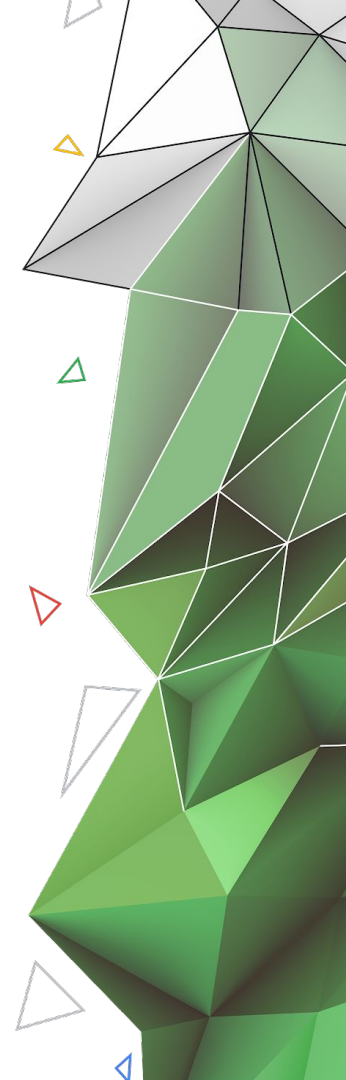
Interest of Aware Non-Users

27%

Influence on Future of Gaming

65%

- Over half of respondents in the Asia Pacific are aware of esports (56%), and it has the highest awareness among all of the gaming trends listed.
 - Among respondents that are aware of esports, 44% of them currently engage with esports content, and engagement is higher among males (48%) than it is among females (39%).
- Among respondents that are aware of esports but are not currently interacting with it, 27% are interested in interacting with it in the future.
- Over half of participants that are aware of esports (65%) say it will be very or extremely influential in the future of gaming.
 - Ages 18-34 (74%) have the highest percentage that express this sentiment among the age groups, while a lower percentage of ages 35-44 (58%) and ages 45-54 (51%) feel that esports will be very or extremely influential in the future of gaming.
- Respondents that currently engage with esports most often do so by watching streams on YouTube (76%), playing esports games (60%), following esports news (47%), and/or following teams/gamers on social media (46%).
 - Participants that currently engage with esports do so because it is entertaining to watch (61%), because they like to watch players with high skill levels (56%), and/or to improve their own skills/learn new strategies etc. (51%).
- Among participants that currently engage with esports, MOBA (51%), shooter games (48%), and sports (46%) are the most popular types of games that they follow in this manner.



Asia Pacific

Awareness

34%

Engagement Among Aware

53%

Interest of Aware Non-Users

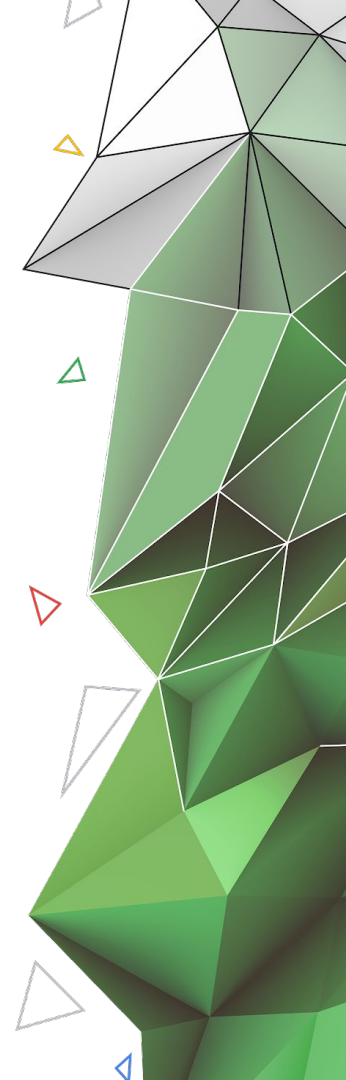
48%

Influence on Future of Gaming

67%



- Among the **34%** of participants in the Asia Pacific region that are aware of user-generated content in gaming, **53%** currently engage with this type of content.
 - Among user-generated content aware participants, a higher percentage of ages 18-34 (**58%**) and ages 35-44 (**51%**) currently interact with this gaming trend than ages 45-54 (**38%**) and ages 55+ (**32%**).
- Among respondents that are aware of user-generated content in gaming but do not currently engage with it, **48%** of them are interested in interacting with it in the future.
- Most participants in the Asia Pacific region (**67%**) that are aware of user-generated content think it will be very or extremely influential in the future of gaming.
 - This sentiment is felt most strongly among Heavy Players (**82%**), while a lower percentage of Light Players (**57%**) and Medium Players (**66%**) express this sentiment.
- Players that create their own content most often do so because they find it creatively fulfilling (**59%**), because it is a way to keep playing a game they like and keep it interesting (**57%**), and/or since it is fun (**56%**).
- Among respondents that engage with user-generated content, participants most often say they mostly play or use content created by others, but they also create a little bit of their own content (**33%**).



Global Insights

Europe, Middle East & Africa

February 2023



VIRTUAL REALITY

Europe, Middle East, & Africa

Awareness

54%

Engagement Among Aware

28%

Interest of Aware Non-Users

65%

Influence on Future of Gaming

78%

- In Europe, the Middle East, and Africa, virtual reality has the highest awareness among all the gaming trends listed (**54%**).
 - Among participants that are aware of virtual reality, **28%** of them are currently using it.
 - Virtual reality usage is higher females (**31%**) than it is among males (**26%**), and is also higher among Heavy Players (**40%**) than it is among and Light Players (**18%**) and Medium Players (**29%**).
- Among respondents that have heard of virtual reality but are not currently using it, **65%** are interested in using it in the future.
- Most participants in Europe, the Middle East, and Africa that are aware of virtual reality think it will be very or extremely influential in the future of gaming (**78%**).
- PlayStation VR (**61%**) and the Samsung Gear VR (**26%**) are the most commonly used virtual reality devices among participants in Europe, the Middle East, and Africa.
- Respondents in Europe, the Middle East, and Africa that play VR games most often play them because the technology is new and exciting (**53%**), because VR games allow them to interact with games in unique or realistic ways (**49%**), because VR games are more thrilling than traditional games (**48%**), and/or since VR games are very immersive (**45%**).
- Participants in Europe, the Middle East, and Africa that play VR games most often play games on this kind of device for 2-4 hours a week (**52%**).



THE METAVERSE

Europe, Middle East, & Africa

Awareness

37%

Engagement Among Aware

N/A

Interest of Aware Non-Users

68%

Influence on Future of Gaming

70%

- Among the participants in Europe, the Middle East, and Africa that are aware of the metaverse (**37%**), **68%** are interested in engaging with it in the future, making it the gaming trend with the highest future interest among the trends listed.
 - Interest in engaging with the metaverse is highest among Heavy Players (**78%**), while it is lower among Light Players (**56%**) and Medium Players (**69%**).
- Most respondents in Europe, the Middle East, and Africa (**70%**) that are aware of the metaverse think that it will be very or extremely influential in the future of gaming.
 - A higher percentage of Heavy Players think the metaverse will be very or extremely influential in the future of gaming (**78%**) compared to the percentage of Light Players (**65%**) and Medium Players (**67%**) that say the same.
- Among respondents that have heard of the metaverse, they most often say that they somewhat understand it (**40%**), while another **47%** say they understand it very well or completely.
- Among participants that are interested in using or interacting with the metaverse in the future, they are most often looking forward to playing games (**67%**), attending virtual events (e.g., concerts) (**47%**), and/or hanging out with friends/socializing (**47%**).
- Among respondents that are aware of the metaverse but are not interested in using or interacting with it in the future, the most common reasons that they are not interested in it are because they do not have any friends who are using it (**32%**), they do not want to spend money on equipment (**29%**), and/or they have privacy concerns (**27%**).



PLAY-TO-EARN GAMES

Europe, Middle East, & Africa

Awareness

44%

Engagement Among Aware

48%

Interest of Aware Non-Users

56%

Influence on Future of Gaming

76%

- Among the **44%** of participants in Europe, the Middle East, and Africa that have heard of play-to-earn games (e.g., NFTs, crypto), **48%** of them currently engage with these kinds of games.
 - Engagement in play-to-earn games is more common with Mobile Players (**51%**) than it is for PC/Console Players (**44%**).
- Among respondents that are aware of play-to-earn games but are not currently engaging with these games, **56%** of them are interested in engaging with this kind of gaming in the future.
 - Among aware non-users, ages 18-34 show the most interest in engaging with play-to-earn games in the future (**59%**), while ages 45-54 (**43%**) and ages 55+ (**48%**) are less often interested in interacting with this trend in the future.
- Most participants (**76%**) that are aware of play-to-earn games believe that they will be very or extremely influential in the future of gaming.
- Participants that currently engage in play-to-earn games most often do so to earn short-term cash/funds (**58%**), because they are interested in cryptocurrency/NFTs in general (**49%**), because the game itself is fun/engaging (**48%**), and/or they feel like they get a good return on their time/investment (**46%**).
- While **64%** of respondents say they understand the concept of playing-to-earn very well or completely, another **30%** say they somewhat understand this concept.
- Among respondents that engage with play-to-earn games, they do so more often on mobile devices (**85%**) than on a PC (**39%**).



CROSS-PLATFORM GAMEPLAY

Europe, Middle East, & Africa

Awareness

42%

Engagement Among Aware

57%

Interest of Aware Non-Users

50%

Influence on Future of Gaming

73%

- Most respondents in Europe, the Middle East, and Africa (**70%**) say they are more or much more likely to play a game if it supports cross-platform gameplay.
 - A higher percentage of Heavy Players (**81%**) say they are more or much more likely to play a game if it supports cross-platform gameplay compared to Light Players (**60%**) and Medium Players (**69%**).
- Among the **42%** of participants in Europe, the Middle East, and Africa have heard of cross-platform gameplay, **57%** currently use this functionality, making it the most commonly used gameplay trend among the ones listed.
 - Cross-platform gameplay is more common among Heavy Players (**66%**) than it is among Light Players (**47%**) and Medium Players (**58%**).
 - Among respondents that have heard of cross-platform gameplay but are not currently using it, **50%** are interested in using it in the future.
- Among cross-platform gameplay aware respondents, **73%** say it will be very or extremely influential in the future of gaming.
- Most participants engage with cross-platform gameplay to play with or against other players who are using different devices (**77%**), while a lower percentage do so to play the same game across multiple devices (**44%**).



CLOUD GAMING

Europe, Middle East, & Africa

Awareness

40%

Engagement Among Aware

48%

Interest of Aware Non-Users

53%

Influence on Future of Gaming

71%

- Among the **40%** of participants in Europe, the Middle East, and Africa have heard of cloud gaming, **48%** currently use it.
 - Among cloud gaming aware respondents, Heavy Players (**57%**) have a higher percentage of participants that currently use cloud gaming compared to Light Players (**40%**) and Medium Players (**47%**).
 - Similarly, PC/Console Players (**51%**) have a higher percentage of respondents that currently use cloud gaming compared to Mobile Players (**43%**).
- Among respondents that have heard of cloud gaming but are not currently using it, **53%** are interested in using it in the future.
- Among cloud gaming aware respondents, **71%** say this technology will be very or extremely influential on the future of gaming.
- Among participants that currently engage with cloud gaming, they most often do so to access more games (**55%**), to save time with game downloads (**51%**), and/or to play remotely (**41%**).
- Over half of respondents in Europe, the Middle East, and Africa (**54%**) say they somewhat or strongly prefer the experience of playing games on the cloud compared to the standard gameplay experience.
 - This sentiment is most common among Heavy Players (**64%**), while it is less common among Light Players (**47%**) and Medium Players (**49%**).



AUGMENTED REALITY

Europe, Middle East, & Africa

Awareness

43%

Engagement Among Aware

35%

Interest of Aware Non-Users

43%

Influence on Future of Gaming

72%

- Among the **43%** of participants in Europe, the Middle East, and Africa that have heard of augmented reality games, **35%** currently engage with them.
 - A higher percentage of females (**40%**) currently engage with augmented reality games compared to the percentage of males (**30%**) that engage with them.
- Among respondents that have heard of augmented reality but are not using or interacting with it, **43%** are interested in engaging with it in the future.
 - A higher percentage of PC/Console Players (**46%**) are interested in engaging with augmented reality games in the future compared to Mobile Players (**40%**).
- Most respondents in Europe, the Middle East, and Africa that have heard of augmented reality, (**72%**) think that it will be very or extremely influential in the future of gaming.
- Among participants that play augmented reality games, they most often do so because they like the idea of merging the digital and physical world in gaming (**49%**), because the technology is new and exciting (**43%**), and/or since augmented reality games turn real life into an adventure (**42%**).



CROSS-MEDIA GAMING
(IP & BRANDS)

Europe, Middle East, & Africa

Awareness

26%

Engagement Among Aware

49%

Interest of Aware Non-Users

54%

Influence on Future of Gaming

70%

- Among the **26%** of respondents in Europe, the Middle East, and Africa that are aware of cross-media gaming experiences, **49%** currently interact with this trend.
 - A higher percentage of females interact with cross-media gaming experiences (**51%**) compared to the percentage of males that do so (**45%**).
- Most participants in Europe, the Middle East, and Africa (**70%**) that are aware of cross-media gaming experiences think it will be very or extremely influential in the future of gaming.
- Among respondents that are aware of cross-media gaming experiences but are not currently engaging with them, **54%** are interested in engaging with these kinds of experiences in the future.
- Most respondents in Europe, the Middle East, and Africa (**61%**) say they like seeing brands, properties, and characters from other media in games or say they like this a lot.
 - A higher percentage of Heavy Players like seeing brands, properties, and characters from other media or like this a lot (**76%**) compared to the percentage of Light Players (**52%**) and Medium Players (**60%**) that say the same.
- Most participants in Europe, the Middle East, and Africa (**62%**) say having brands, properties, and/or characters from other media in a game has a positive or very positive effect on their interest in playing a game.
 - A higher percentage of PC/Console Players (**68%**) say cross-media has a positive or very positive effect on their interest to play a game compared to the percentage of Mobile Players (**57%**) that say the same.



ESPORTS

Europe, Middle East, & Africa

Awareness

48%

Engagement Among Aware

44%

Interest of Aware Non-Users

31%

Influence on Future of Gaming

71%

- Among the **48%** of participants in Europe, the Middle East, and Africa that have heard of esports, **44%** of them currently engage with esports content.
 - Esports engagement is higher among males (**50%**) than it is among females (**35%**), and it is also higher among ages 18-34 (**49%**) and ages 35-44 (**43%**) than it is among ages 45-54 (**31%**) and ages 55+ (**20%**).
- Among respondents that are aware of esports but are not currently interacting with it, **31%** are interested in interacting with it in the future.
- Over half of participants that are aware of esports (**71%**) say it will be very or extremely influential in the future of gaming.
 - Heavy Players (**74%**) have a higher percentage of respondents that express this sentiment among the age groups compared to the percentage of Light Players (**64%**) and Medium Players (**70%**) that feel the same.
- Respondents that currently engage with esports most often do so by watching streams on YouTube (**62%**), playing esports games (**61%**), following esports news (**49%**), and/or following teams/gamers on social media (**42%**).
 - Participants that currently engage with esports do so because it is entertaining to watch (**56%**), because they like to watch players with high skill levels (**50%**), and/or to improve their own skills/learn new strategies etc. (**48%**).
- Among participants that currently engage with esports, sports games (**71%**), shooter games (**44%**), and fighting games (**40%**) are the most popular type of games that they follow in this manner.



USER-GENERATED CONTENT

Europe, Middle East, & Africa

Awareness

29%

Engagement Among Aware

50%

Interest of Aware Non-Users

48%

Influence on Future of Gaming

66%

- Among the **29%** of participants in Europe, the Middle East, and Africa that are aware of user-generated content in gaming, **50%** currently engage with this type of content.
 - Among user-generated content aware participants, a higher percentage of Heavy Players (**56%**) currently interact with this gaming trend than Light Players (**45%**) and Medium Players (**48%**).
- Among respondents that are aware of user-generated content in gaming but do not currently engage with it, **48%** of them are interested in interacting with it in the future.
- Most participants in Europe, the Middle East, and Africa (**66%**) that are aware of user-generated content think it will be very or extremely influential in the future of gaming.
- Players that create their own content most often do so because it is fun (**58%**), because they find it creatively fulfilling (**53%**), and/or since it is a way to keep playing a game they like and keep it interesting (**77%**).
- Among respondents that engage with user-generated content, participants most often say they mostly play or use content created by others, but they also create a little bit of their own content (**35%**).



Global Insights

Latin America

February 2023



Latin America

Awareness

58%

Engagement Among Aware

26%

Interest of Aware Non-Users

73%

Influence on Future of Gaming

85%

- Among the 58% of participants in Latin America that are aware of virtual reality, 26% of them say they are currently using this kind of device.
 - Virtual reality usage is higher females (29%) than it is among males (22%), and is also higher among ages 18-24 (26%) and ages 35-44 (29%) than it is among and ages 45-54 (20%) and ages 55+ (19%).
- Among respondents that have heard of virtual reality but are not currently using it, 73% are interested in using it in the future, making it the gaming trend with the second-highest interest among aware non-users (second to the metaverse).
- Most participants in Latin America that are aware of virtual reality think it will be very or extremely influential in the future of gaming (85%).
- PlayStation VR (65%) and the Samsung Gear VR (28%) are the most commonly used virtual reality devices among participants in Latin America.
- Respondents in Latin America that play VR games most often play them because the technology is new and exciting (56%), because VR games allow them to interact with games in unique or realistic ways (49%), because VR games are very immersive (45%), and/or since VR games allow them to be physically active while gaming (35%).
- Participants in Latin America that play VR games most often play games on this kind of device for 2-4 hours a week (51%).



Latin America

Awareness

46%

Engagement Among Aware

N/A

Interest of Aware Non-Users

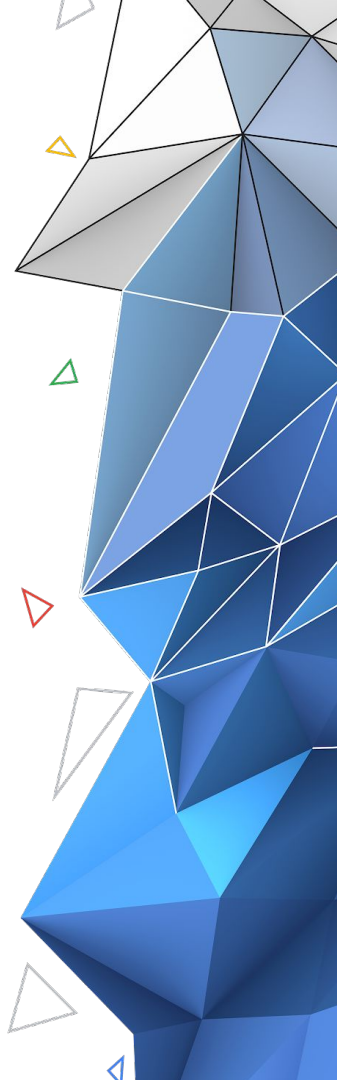
78%

Influence on Future of Gaming

80%



- Among the participants in Latin America that are aware of the metaverse (**46%**), **78%** are interested in engaging with it in the future, making it the gaming trend with the highest future interest among the trends listed.
 - Interest in engaging with the metaverse is highest among Heavy Players (**85%**), while it is lower among Light Players (**72%**) and Medium Players (**75%**).
- Most respondents in Latin America (**80%**) that are aware of the metaverse think that it will be very or extremely influential in the future of gaming.
 - A higher percentage of Heavy Players think the metaverse will be very or extremely influential in the future of gaming (**85%**) compared to the percentage of Light Players (**78%**) and Medium Players (**77%**) that say the same.
- Respondents that have heard of the metaverse most often say that they somewhat understand it (**41%**), while another **50%** say they understand it very well or completely.
- Among participants that are interested in using or interacting with the metaverse in the future, they are most often looking forward to playing games (**77%**), attending virtual events (e.g., concerts) (**50%**), and/or hanging out with friends/socializing (**49%**).
- Among respondents that are aware of the metaverse but are not interested in using or interacting with it in the future, the most common reasons that they are not interested in it are because they have privacy concerns (**35%**), because they do not have any friends who are using it (**29%**), and/or they do not want to spend money on equipment (**27%**).



Latin America

Awareness

47%

Engagement Among Aware

46%

Interest of Aware Non-Users

64%

Influence on Future of Gaming

79%

- Among the **47%** of participants in Latin America that have heard of play-to-earn games (e.g., NFTs, crypto), **46%** of them currently engage with these kinds of games.
 - Engagement with play-to-earn games is more common among males (**52%**) than it is among females (**38%**).
- Among respondents that are aware of play-to-earn games but are not currently engaging with these games, **64%** of them are interested in engaging with this kind of gaming in the future.
 - Among aware non-users, females show a higher interest in engaging with play-to-earn games in the future (**68%**) compared to the percentage of males that are interested in doing so (**60%**).
- Most participants (**79%**) that are aware of play-to-earn games say they think these games will be very or extremely influential in the future of gaming.
- Participants that currently engage in play-to-earn games most often do so because they are interested in cryptocurrency/NFTs in general (**55%**), because the game itself is fun/engaging (**49%**), to earn short-term cash/funds (**47%**), and/or as a long-term investment (**37%**).
- While **61%** of respondents say they understand the concept of playing-to-earn very well or completely, another **30%** say they somewhat understand this concept.
- Among respondents that engage with play-to-earn games, they do so more often on mobile devices (**81%**) than on a PC (**35%**).



Latin America

Awareness

48%

Engagement Among Aware

67%

Interest of Aware Non-Users

53%

Influence on Future of Gaming

83%



- Most respondents in Latin America (**77%**) say they are more or much more likely to play a game if that game supports cross-platform gameplay.
 - A higher percentage of Heavy Players (**87%**) say they are more or much more likely to play a game if it supports cross-platform gameplay compared to Light Players (**66%**) and Medium Players (**74%**).
- Among the **48%** of participants in Latin America have heard of cross-platform gameplay, **67%** currently use this functionality, making it the most commonly used gameplay trend among the ones listed.
 - Cross-platform gameplay is more common among ages 18-34 (**72%**) than it is among the other age groups (**52-63%**).
- Among respondents that have heard of cross-platform gameplay but are not currently using it, **53%** say they are interested in using it in the future.
- Among cross-platform gameplay aware respondents, **83%** say it will be very or extremely influential in the future of gaming.
- Most participants engage with cross-platform gameplay to play with or against other players who are using different devices (**77%**), while a lower percentage do so to play the same game across multiple devices (**48%**).



Latin America

Awareness

49%

Engagement Among Aware

55%

Interest of Aware Non-Users

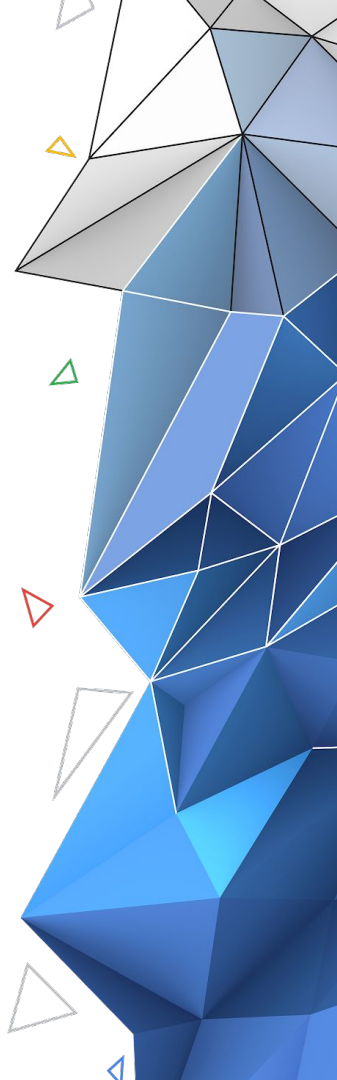
60%

Influence on Future of Gaming

81%



- Among the **49%** of participants in Latin America have heard of cloud gaming, **55%** currently play games this way.
 - Among cloud gaming aware respondents, Heavy Players (**65%**) have a higher percentage of participants that currently use cloud gaming compared to Light Players (**44%**) and Medium Players (**53%**).
 - A higher percentage of PC/Console Players currently use cloud gaming (**62%**) compared to Mobile Players (**45%**).
- Among respondents that have heard of cloud gaming but are not currently using it, **60%** are interested in using it in the future.
- Among cloud gaming aware respondents, **81%** say this technology will be very or extremely influential on the future of gaming.
- Among participants that currently engage with cloud gaming, they most often do so to save time with game downloads (**54%**), to access more games (**49%**), so they do not have to worry about hardware capabilities (**39%**), and/or to play remotely (**35%**).
- Half of respondents in Latin America say they somewhat or strongly prefer the experience of playing games on the cloud compared to the standard gameplay experience.
 - This sentiment is most common among Heavy Players (**58%**), while it is less common among Light Players (**44%**) and Medium Players (**46%**).



Latin America

Awareness

62%

Engagement Among Aware

45%

Interest of Aware Non-Users

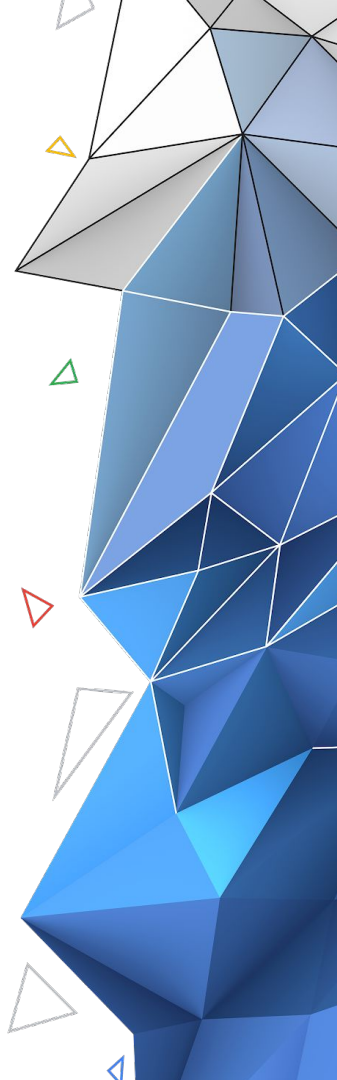
54%

Influence on Future of Gaming

84%



- The majority of participants (**62%**) in Latin America have heard of augmented reality games, making it the gaming trend with the most awareness among all gaming trends listed.
 - **45%** of respondents that are aware of augmented reality currently engage with this technology.
- A higher percentage of ages 18-34 (**51%**) currently engage with augmented reality games compared to the percentage of ages 35-44 (**39%**), ages 45-54 (**30%**), and ages 55+ (**16%**) that engage with them.
 - Among respondents that have heard of augmented reality but are not using or interacting with it, **54%** of them are interested in engaging with it in the future.
- A higher percentage of Heavy Players (**61%**) and Medium Players (**57%**) are interested in engaging with augmented reality games in the future compared to Light Players (**47%**).
- Most respondents in Latin America that have heard of augmented reality, (**84%**) think that it will be very or extremely influential in the future of gaming.
- Among participants that play augmented reality games, they most often do so because they like the idea of merging the digital and physical world in gaming (**56%**), because the technology is new and exciting (**47%**), and/or since augmented reality games allows them to interact with games in unique ways (e.g., moving around to see a different view) (**41%**).



Latin America

Awareness

37%

Engagement Among Aware

59%

Interest of Aware Non-Users

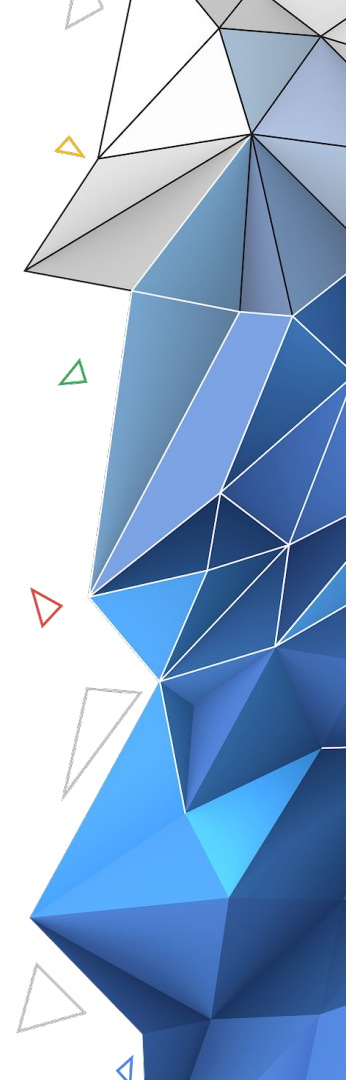
57%

Influence on Future of Gaming

74%



- Among the **37%** of respondents in Latin America that are aware of cross-media gaming experiences, **59%** currently interact with this trend.
 - A higher percentage of PC/Console Players interact with cross-media gaming experiences (**64%**) compared to the percentage of Mobile Players that do so (**52%**).
- Most participants in Latin America (**74%**) that are aware of cross-media gaming experiences think it will be very or extremely influential in the future of gaming.
- Among respondents that are aware of cross-media gaming experiences but are not currently engaging with them, **57%** are interested in engaging with these kinds of experiences in the future.
- Most respondents in Latin America (**76%**) say they like seeing brands, properties, and characters from other media in games or say they like this a lot.
 - A higher percentage of Heavy Players like seeing brands, properties, and characters from other media or like this a lot (**87%**) compared to the percentage of Light Players (**69%**) and Medium Players (**74%**) that say the same.
- Most participants in Latin America (**71%**) say having brands, properties, and/or characters from other media in a game has a positive or very positive effect on their interest in playing a game.
 - A higher percentage of males (**75%**) say cross-media has a positive or very positive effect on their interest to play a game compared to the percentage of females (**67%**) that say the same.



Latin America

Awareness

45%

Engagement Among Aware

48%

Interest of Aware Non-Users

40%

Influence on Future of Gaming

79%



- Among the **45%** of participants in Latin America that have heard of esports, **48%** of them currently engage with esports content.
 - Esports engagement is higher among males (**55%**) than it is among females (**38%**), and it is also higher among Heavy Players (**59%**) than it is among Light Players (**43%**) and Medium Players (**42%**).
- Among respondents that are aware of esports but are not currently interacting with it, **40%** are interested in interacting with it in the future.
- Over half of participants that are aware of esports (**79%**) say it will be very or extremely influential in the future of gaming.
- Respondents that currently engage with esports most often do so by watching streams on YouTube (**79%**), watching streams on Twitch (**48%**), following esports news (**48%**), and/or following teams/gamers on social media (**47%**).
 - Participants that currently engage with esports do so because it is entertaining to watch (**61%**), because they like to watch players with high skill levels (**60%**), and/or to improve their own skills/learn new strategies etc. (**56%**).
- Among participants that currently engage with esports, sports games (**62%**), shooter games (**57%**), and battle royale games (**48%**) are the most popular type of games that they follow in this manner.



Latin America

Awareness

37%

Engagement Among Aware

55%

Interest of Aware Non-Users

53%

Influence on Future of Gaming

74%



- Among the **37%** of participants in Latin America that are aware of user-generated content in gaming, **55%** currently engage with this type of content.
 - Among user-generated content aware participants, a higher percentage of Heavy Players (**60%**) and Medium Players (**59%**) currently interact with this gaming trend than Light Players (**42%**).
- Among respondents that are aware of user-generated content in gaming but do not currently engage with it, **53%** are interested in interacting with this type of content the future.
- Most participants in Latin America (**74%**) that are aware of user-generated content think it will be very or extremely influential in the future of gaming.
 - A higher percentage of females in Latin America think user-generated content will be very or extremely influential in the future of gaming (**79%**) compared to the percentage of males in Latin America that say the same (**69%**).
- Players that create their own content most often do so because it is fun (**64%**), because it is a way to keep playing a game they like and keep it interesting (**49%**), an/or because they find it creatively fulfilling (**47%**).
- Among respondents that engage with user-generated content, participants most often say they only play or use content created by other and that they do not create their own content (**38%**).



Google for Games

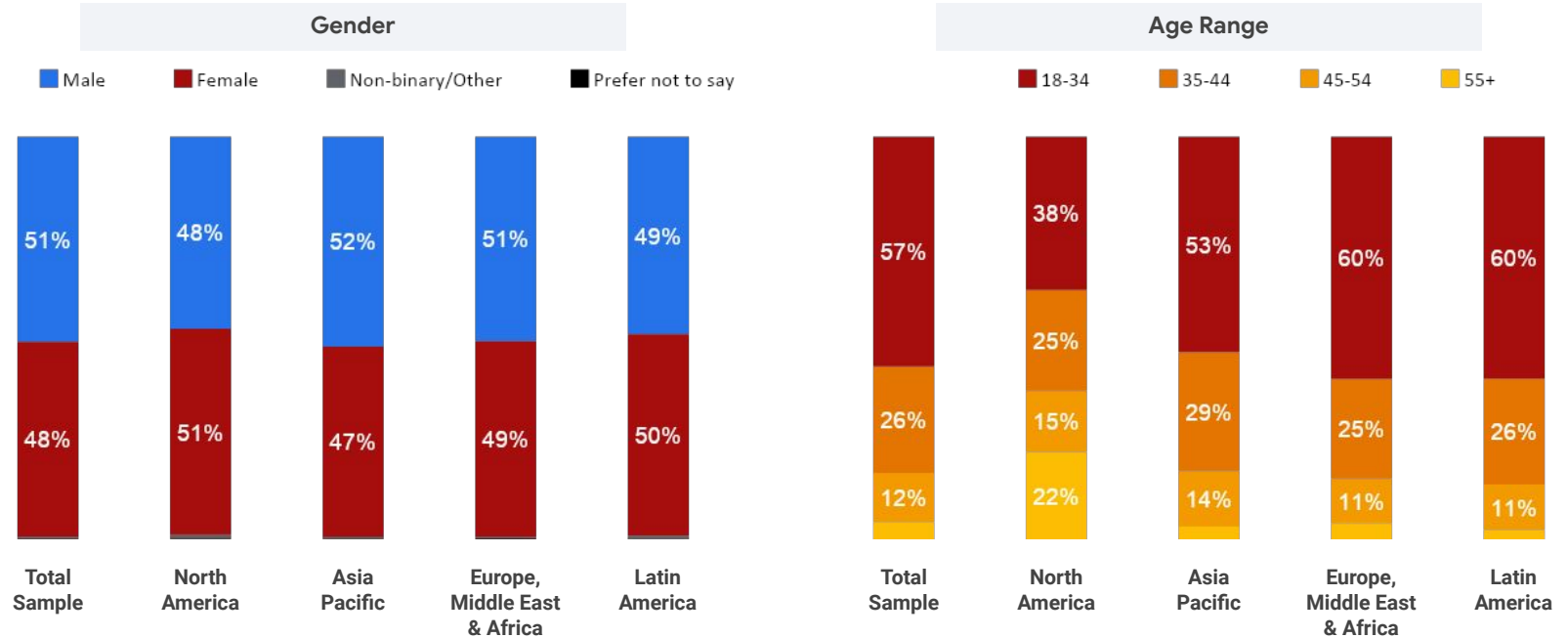
Demographics

February 2023



In this study, 51% of participants are male, while 48% are female

The majority of participants (57%) are in the 18-34 age range, 25% are in the 35-44 age range, 12% are in the 45-54 age range, and 5% are in the 55+ age range.



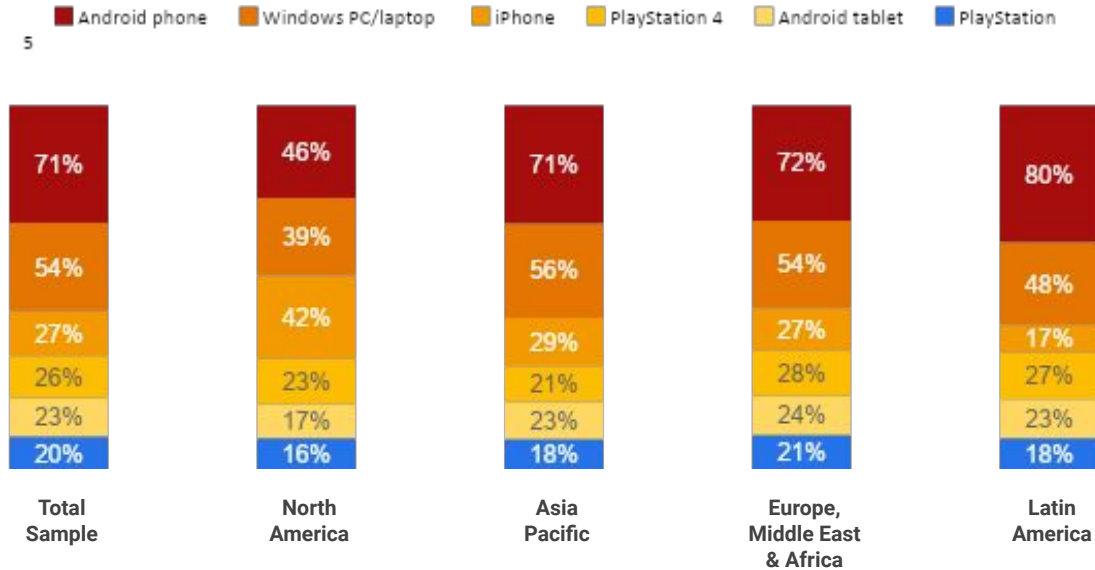
Q - What is your gender? What is your age?
 Total Sample (n = 18,029); North America (n = 786); Asia Pacific (n = 5,708),
 Europe, Middle East & Africa (n = 10,098); Latin America (n = 1,437)



Respondents most often play games on Android phones (71%) and/or Windows PCs/laptops (54%)

There is a similar proportion of gamers that play weekly on an iPhone (27%), PlayStation 4 (26%), Android tablet (23%), and/or a PlayStation 5 (20%).

Global Gaming Device Breakdown

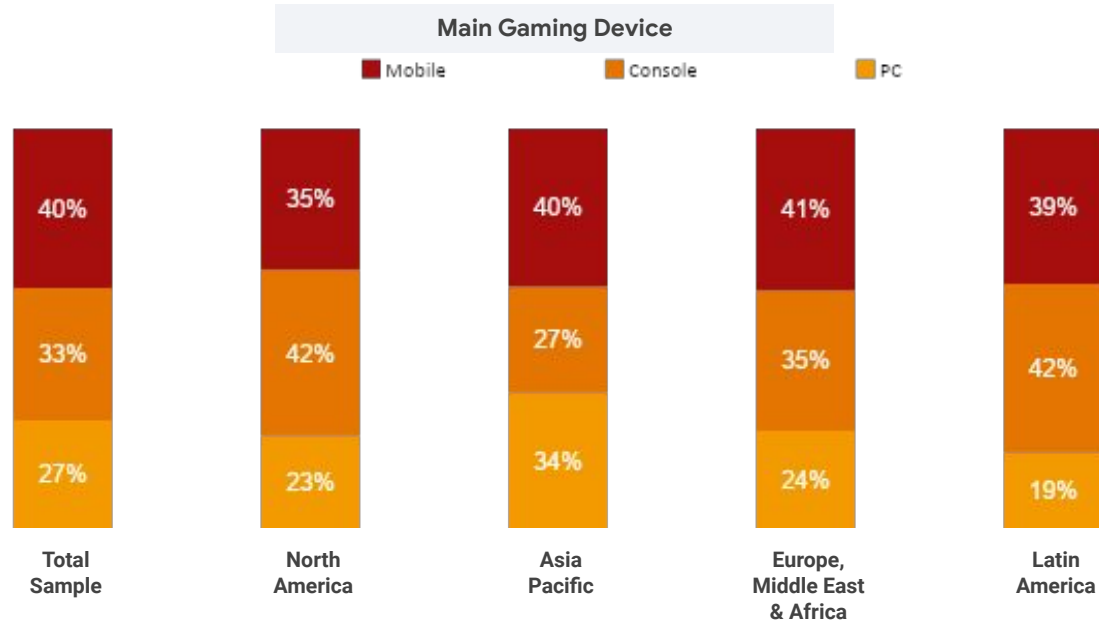


Q - Which of the following devices do you use to play games in a typical week, if any? (Select all that apply.)
 Total Sample (n = 18,029); North America (n = 786); Asia Pacific (n = 5,708); Europe, Middle East & Africa (n = 10,098);
 Latin America (n = 1,437) Note: Only showing devices that were selected by at least 20% of the total sample.

Among respondents that play games on mobile and PC/console, players most often say mobile is their main device for gaming

This study aimed to recruit a 50/50 split between mobile-primary gamers and PC/console primary gamers.

- The final sample has **51%** mobile primary gamers and **49%** PC/console primary gamers.

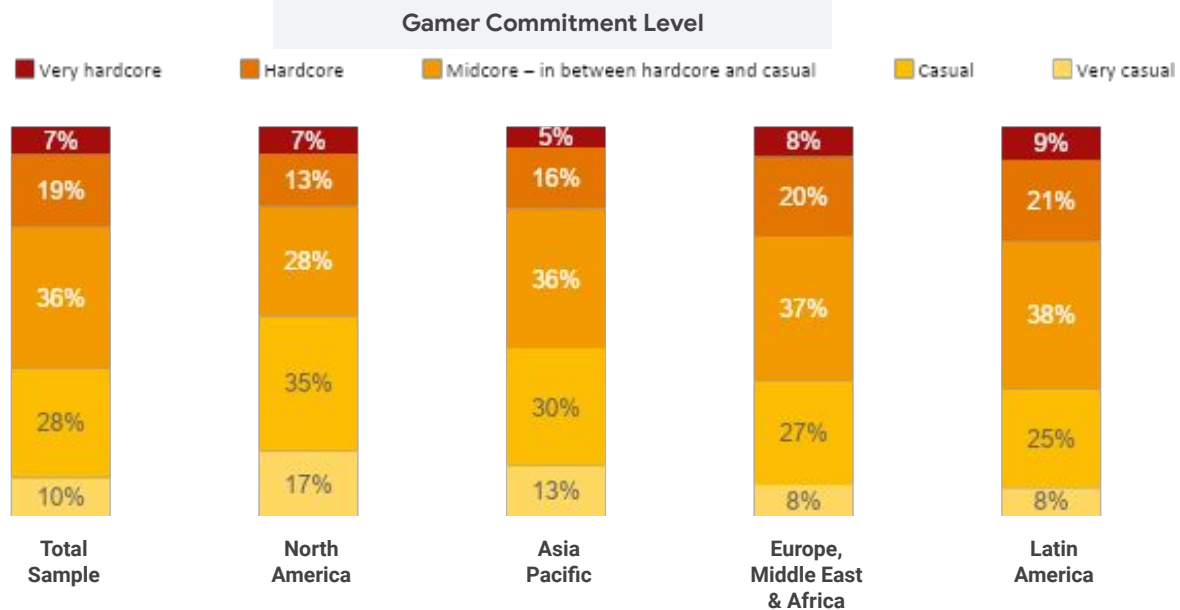


Asked among respondents that play games on both mobile devices and PC or consoles:
What is your main device for playing games?
Total Sample (n = 10,422); North America (n = 390); Asia Pacific (n = 3,419),
Europe, Middle East & Africa (n = 5,737); Latin America (n = 876)



North America has the highest percentage of respondents that are self-reported casual gamers among the different regions

About half of participants in North America identify as casual or very casual gamers (51%). Europe, the Middle East, and Africa (28%) and Latin America (29%) have a higher percentage of respondents that identify as hardcore or very hardcore gamers than in North America (20%) and the Asia Pacific (21%).

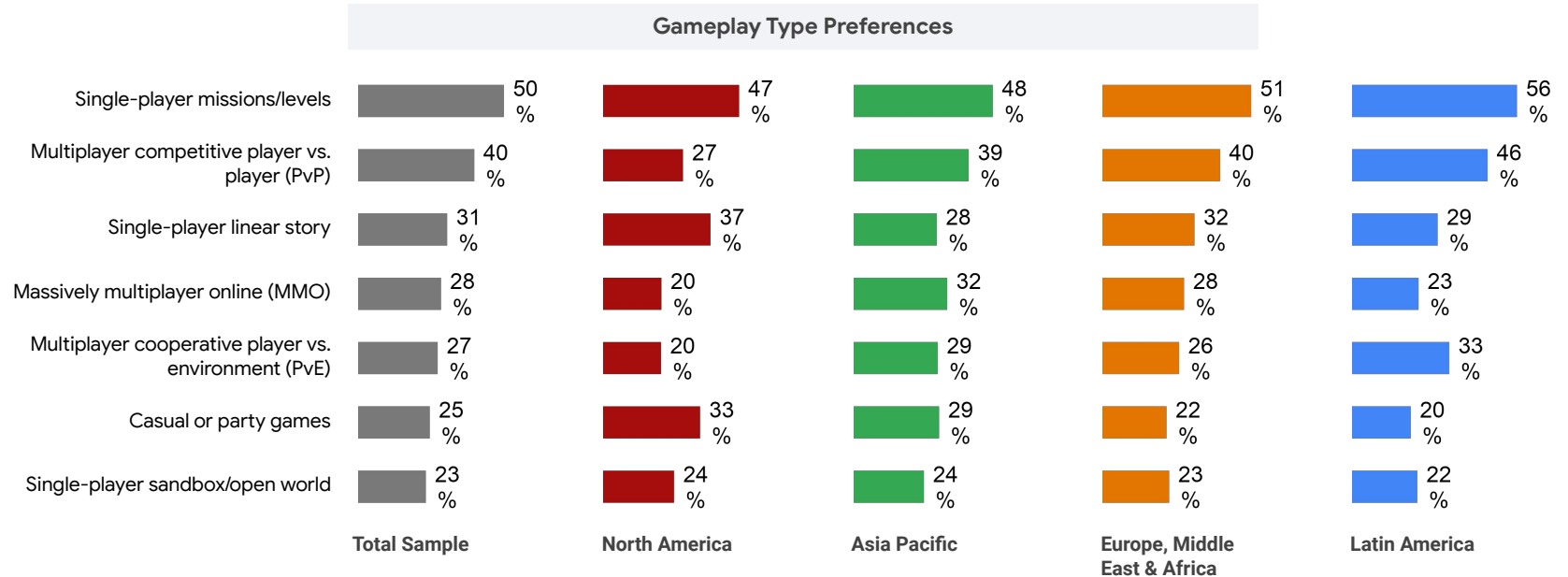


Q - How would you describe yourself as a gamer?
 Total Sample (n = 18,029); North America (n = 786); Asia Pacific (n = 5,708),
 Europe, Middle East & Africa (n = 10,098); Latin America (n = 1,437)



Participants most often prefer single-player missions/levels among the different types of gameplay

Many respondents also prefer multiplayer competitive player vs. player (PvP) (40%) and/or single-player linear story (31%) among different gameplay types.

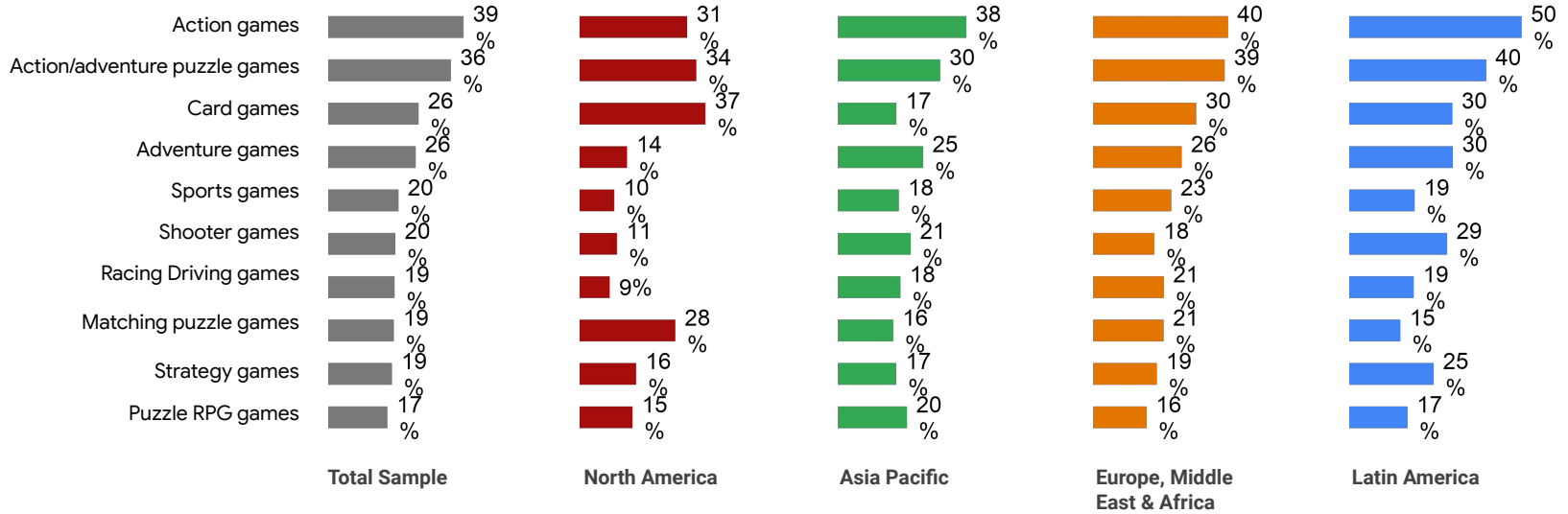


Q - Which of these types of gameplay do you prefer playing? (Select up to three that you most prefer.)
 Total Sample (n = 18,029); North America (n = 786); Asia Pacific (n = 5,708);
 Europe, Middle East & Africa (n = 10,098); Latin America (n = 1,437)

Action games (39%) and action adventure puzzle games (36%) are the mobile game genres that mobile gamers play most often

Among mobile gamers in North America, Card games are chosen most often as the genre that respondents typically play on mobile devices (37%).

Popular Mobile Game Genres

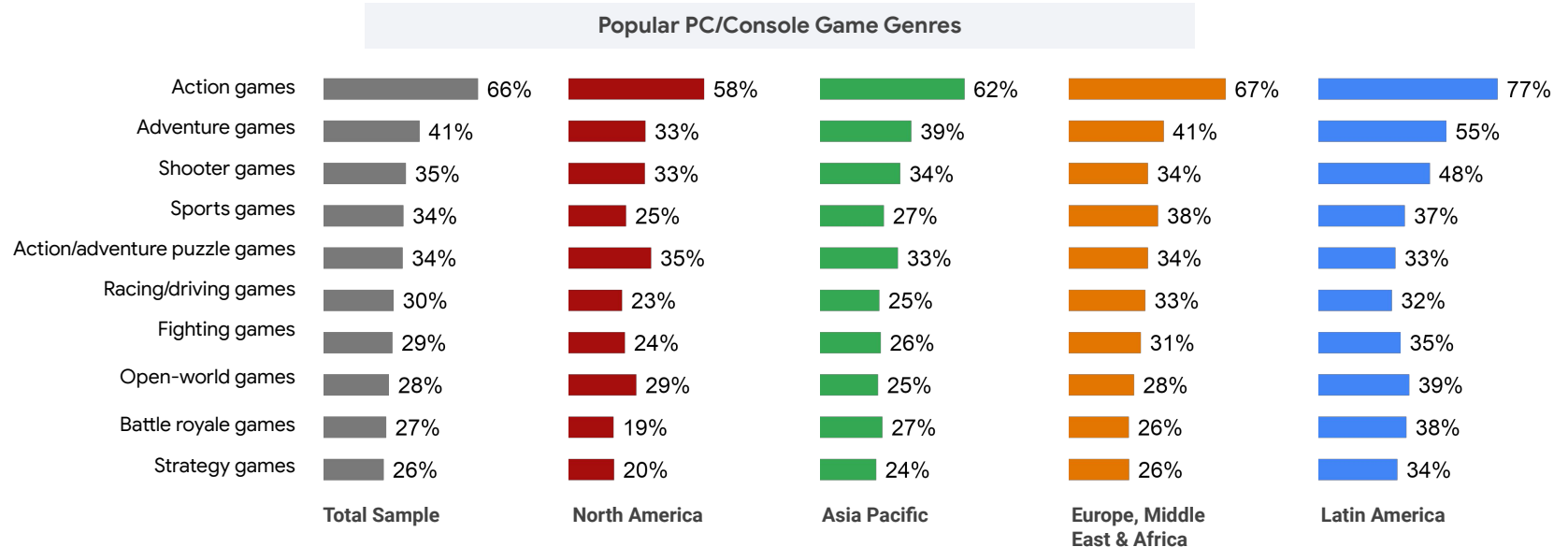


Asked among respondents that play games on mobile devices:
 Which of the following types of games do you typically play on a mobile device? (Select all that apply.)
 The top 10 selections are shown above.
 Total Sample (n = 9,123); North America (n = 376); Asia Pacific (n = 2,887),
 Europe, Middle East & Africa (n = 5,145); Latin America (n = 715)



Action games (66%) is the PC/console game genre that PC/console gamers play most often

Many PC/console gamers typically play adventure games (41%), shooter games (35%), sports games (34%), and/or action adventure puzzle games (34%) on PCs or consoles.



Asked among respondents that play games on PC or consoles:
Which of the following types of games do you typically play on PC or Console? (Select all that apply.)
The top 10 selections are shown above.
Total Sample (n = 8,906); North America (n = 410); Asia Pacific (n = 2,821),
Europe, Middle East & Africa (n = 4,953); Latin America (n = 722)



Segmentation

Respondents are divided into segments according to their gender, age, gaming habits, and disability status:

Males (n = 9,165) **Females** (n = 8,721)

Ages 18-34 (n = 10,277) **Ages 35-44** (n = 4,745)

Ages 45-54 (n = 2,178) **Ages 55+** (n = 829)

Mobile Players (n = 9,123)

- Use a qualifying mobile device* to play games for at least 2 hours per week

PC/Console Players (n = 8,906)

- Use a qualifying PC or console* to play games for at least 2 hours per week

Light Players (n = 6,858)

- Self identify as a casual or very casual gamer

Medium Players (n = 6,553)

- Self identify as a midcore gamer

Heavy Players (n = 4,618)

- Self identify as a hardcore or very hardcore gamer

Players with Disabilities (n = 1,344)

- Have a disability or impairment that affects the way they play games

Non-disabled Players (n = 13,487)

- Does not have a disability or impairment that

* Qualifying devices: Android phone, android tablet, iMac/MacBook, iPad, iPhone, Nintendo Switch, PlayStation 4, PlayStation 5, Steam Deck, Xbox One, Xbox Series X/S, Windows PC/laptop.

About Us



VGM is a leading global market research firm and the largest provider of custom research to the video game industry. We provide superior market research services in seven areas:

1. **Extensive Experience:** VGM has conducted 1,000+ qualitative and quantitative studies.
2. **Unique Significant Live Sample (SLS) Methodology:** High sample size in-person testing. Hybrid qualitative and quantitative deliverable. Total security of confidential assets.
3. **Expansive Normative Database:** We have aggregated consistent data points across hundreds of thousands of survey responses to create the largest normative database of video game playtest scores in the industry, as well as an extensive database of non-playtest online survey scores.
4. **Unparalleled Recruiting Capabilities:** Superior quality, higher accuracy, and faster turnaround time on recruiting. We are one of the only full-service vendors that handles recruiting internally.
5. **Fast Delivery:** Topline report delivered in 48 hours upon completion of all projects, including weekends.
6. **Exceptional White Glove Service:** Your dedicated project manager, moderator, and analysts will customize the research to your needs, take ownership of the project, and provide the highest level of support.
7. **In-House Capabilities:** VGM is unique in that each component of your research is handled internally. As a result, our quality, speed, and pricing is superior to other full-service research firms that generally outsource various components of the project.

