



# Multi-Device Gaming is the New Reality: A Multi-Country Survey Report

Bob O'Donnell, President and Chief Analyst



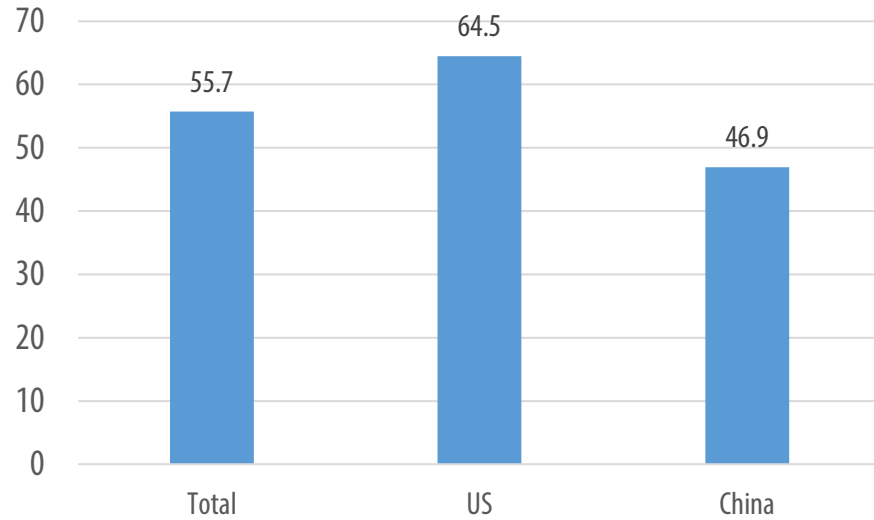
# Goals and Methodology

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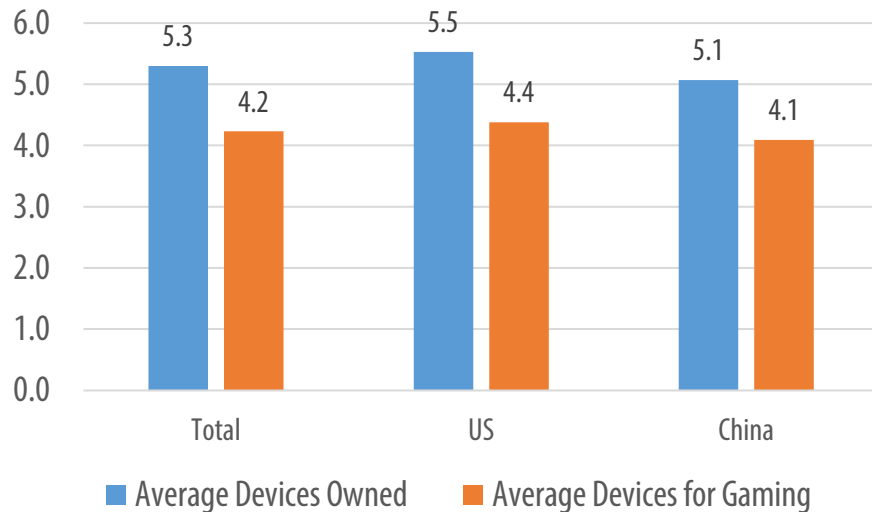
- Understand how US and Chinese consumer gaming habits are evolving
  - What devices, what games, how long, how much they spend, and more
- Current involvement and interest in multi-platform, multi-device and cloud-based gaming
- Online survey of 2,022 consumers who play games on digital devices for at least two hours a week
  - 1,011 in US and 1,011 in China



## Weekly Gaming Hours



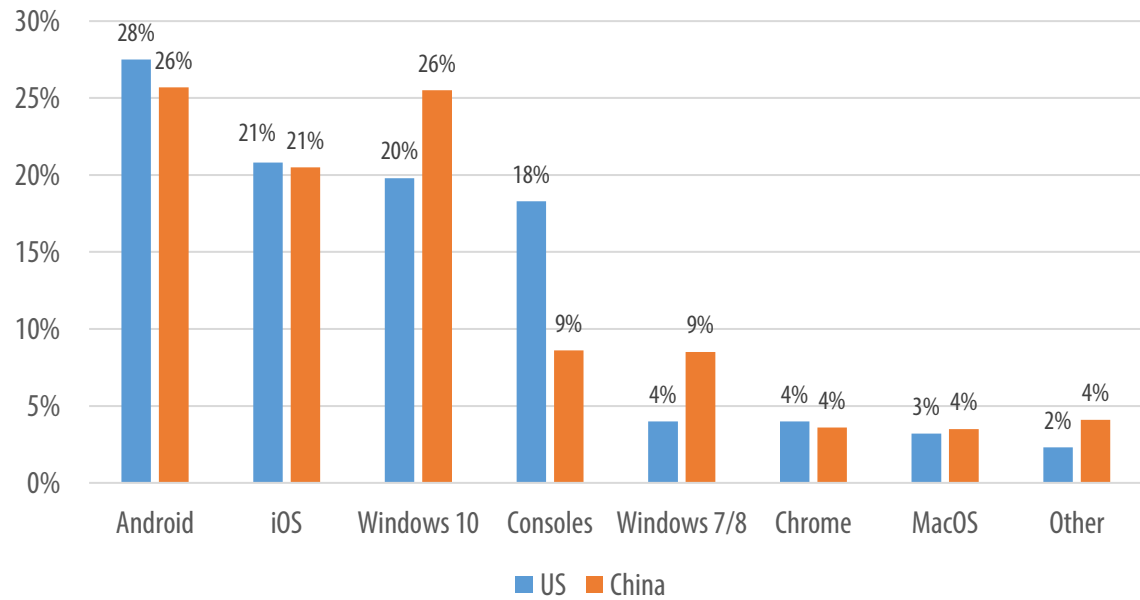
## Total Number of Devices



Nearly everyone is gaming...  
a lot...on multiple devices

# ...On Multiple Platforms

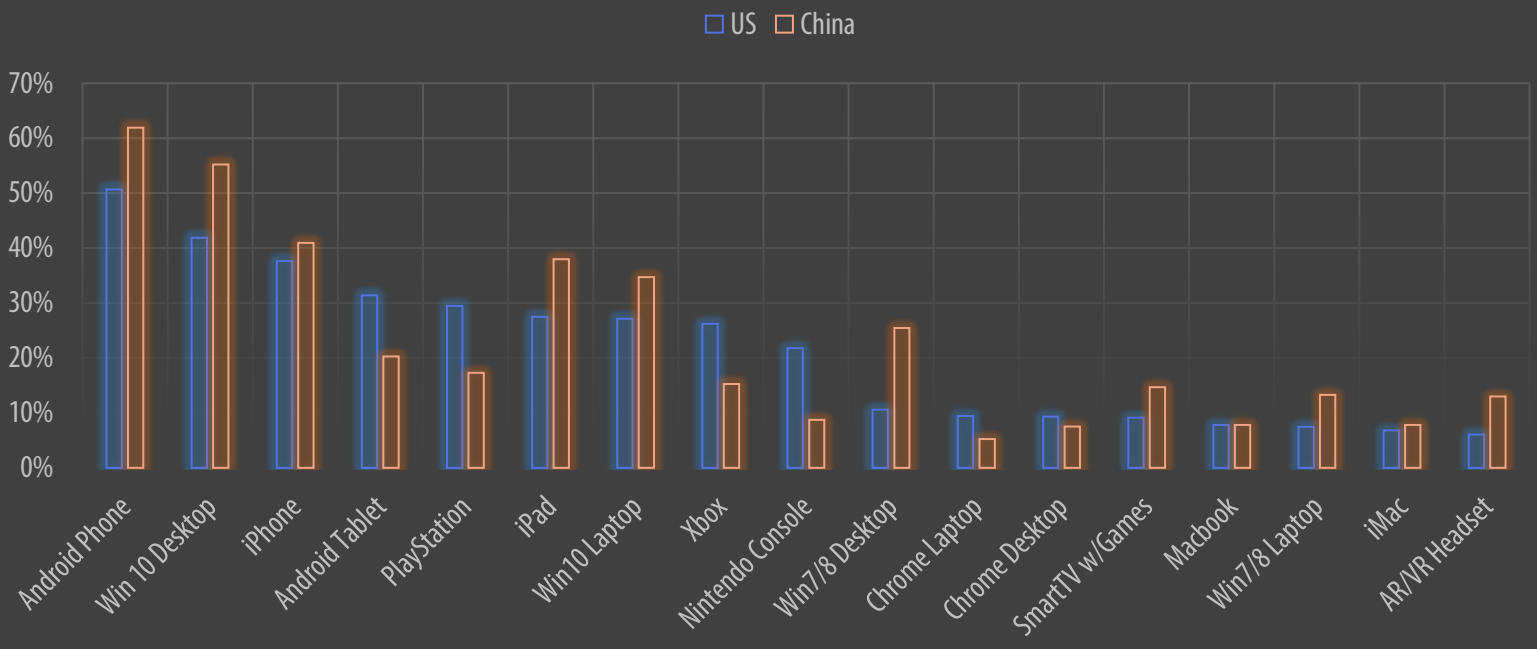
Gaming Platform Share



# Most Popular Gaming Devices

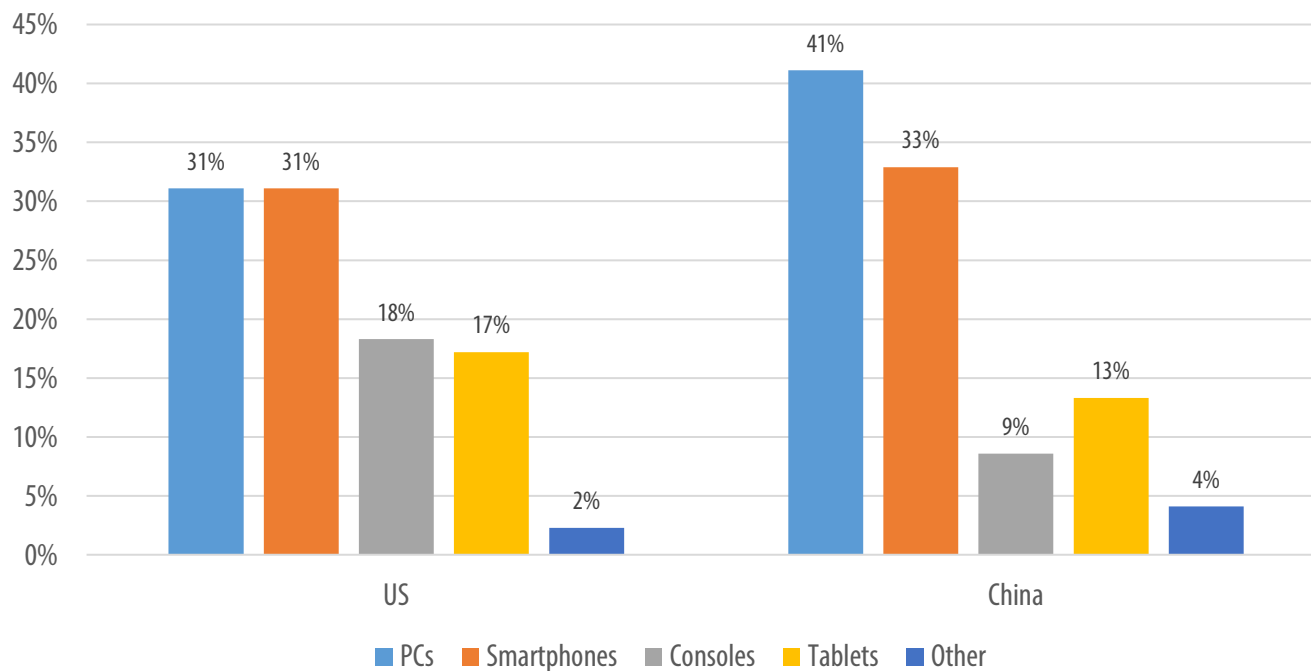


Gaming Device Ownership by Country



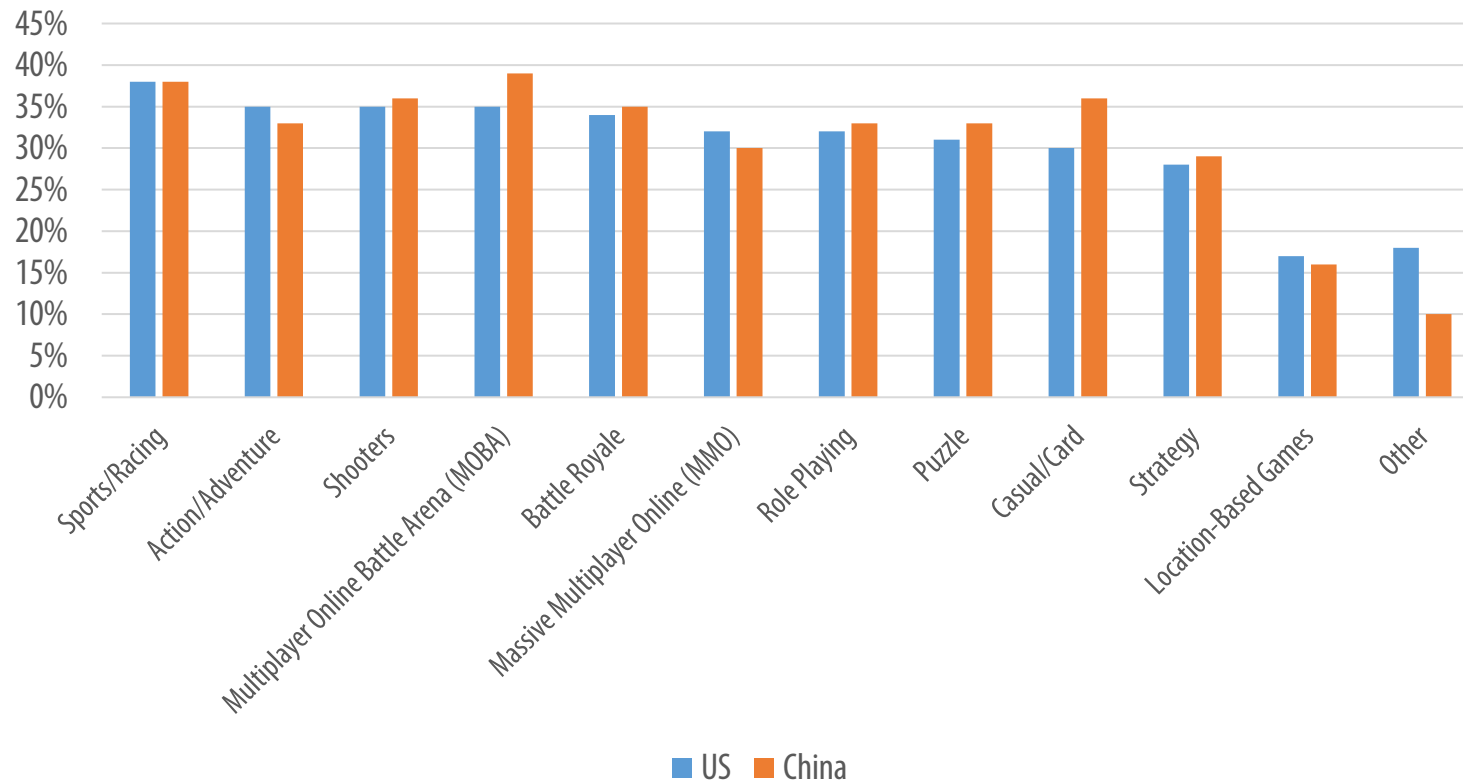
# Smartphones and PC Gaming Time Equal in US, But PCs Lead in China

Total Gaming Time by Device

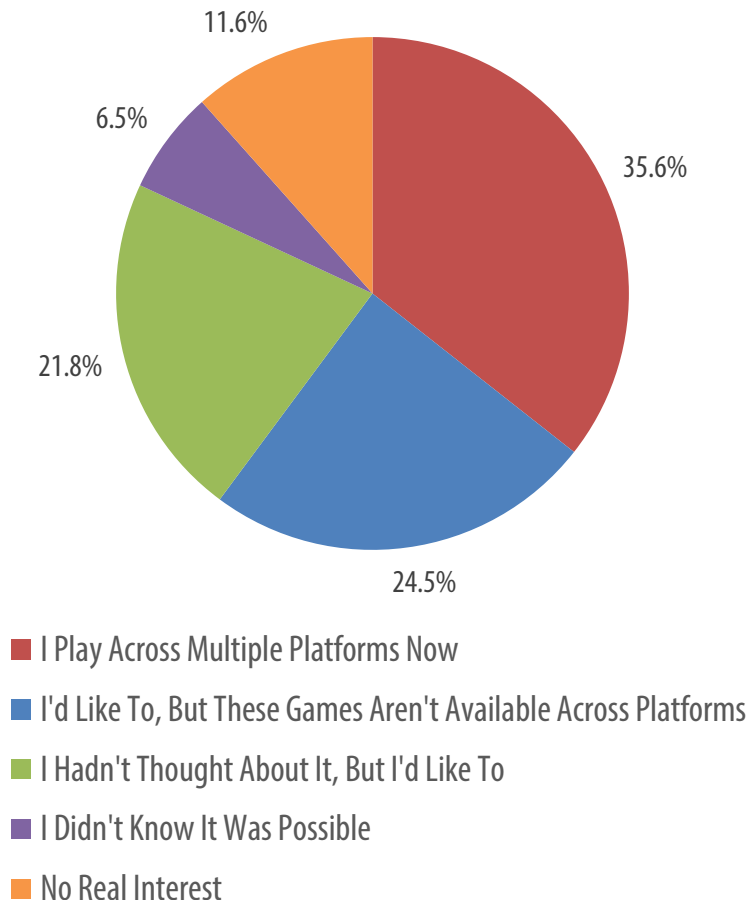


# Most Popular Games

Top Game Genres by Country



## Multi-Platform Gaming Involvement



## Multi-Device Gaming Growing, But Concerns Remain

*“Cross-platform games are the dream that all game companies want to achieve, if you can make a game run smoothly on different devices, [and] freely convert between PC, PS4 and iPhone.”*

*“Integrity of connectivity between cross-platform games [is critical]. There is usually no guarantee that the same game will operate on different platforms with the same content.”*



# Gender Differences are Real

Top 5 Gaming Devices	% Who Use for Gaming
Android Phone	54.8%
iPhone	38.6%
Win 10 Desktop	33.1%
PlayStation	31.7%
Android Tablet	30.0%

US  
Women

Top 5 Game Genres
Puzzle
Casual/Card
Sports/Racing
Action/Adventure
Shooters

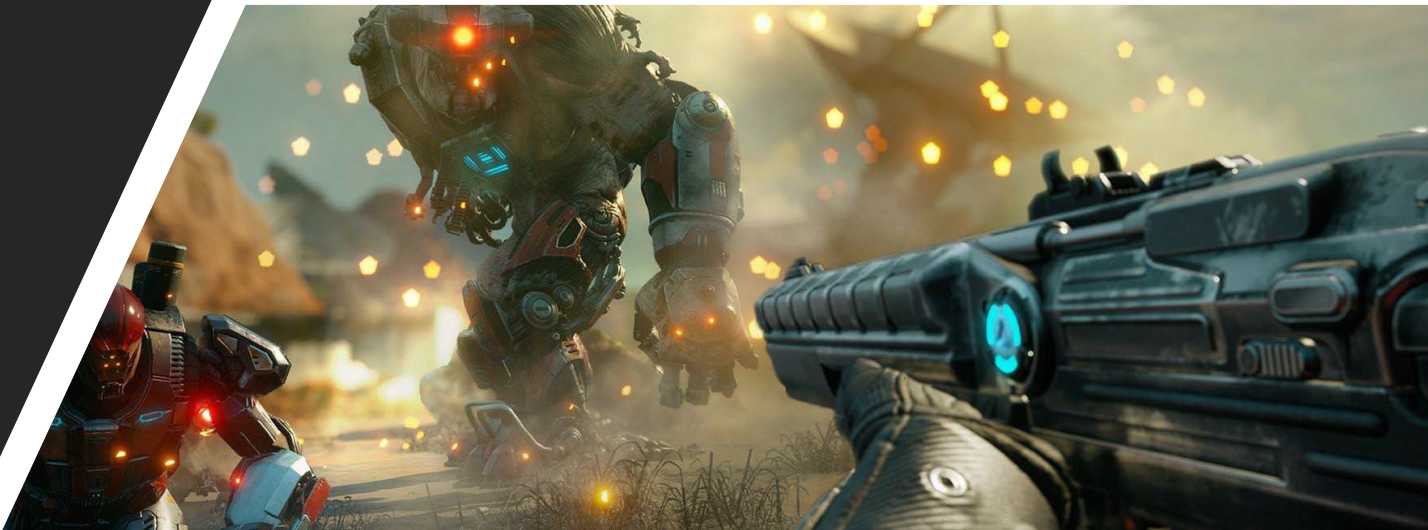
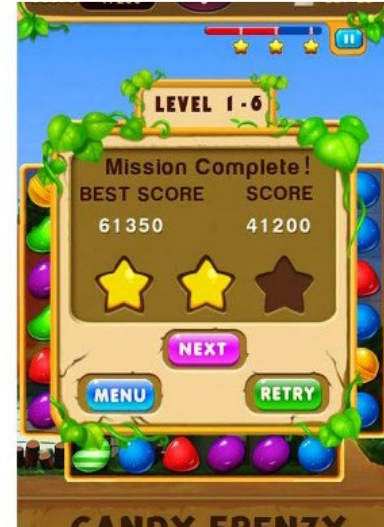
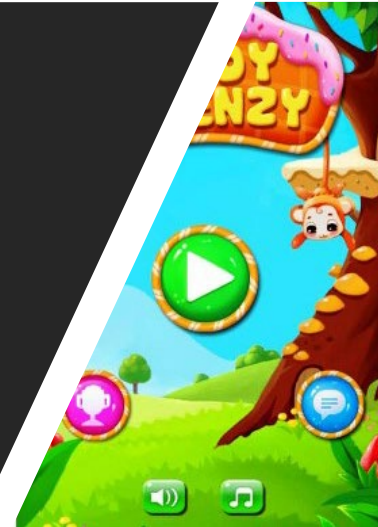
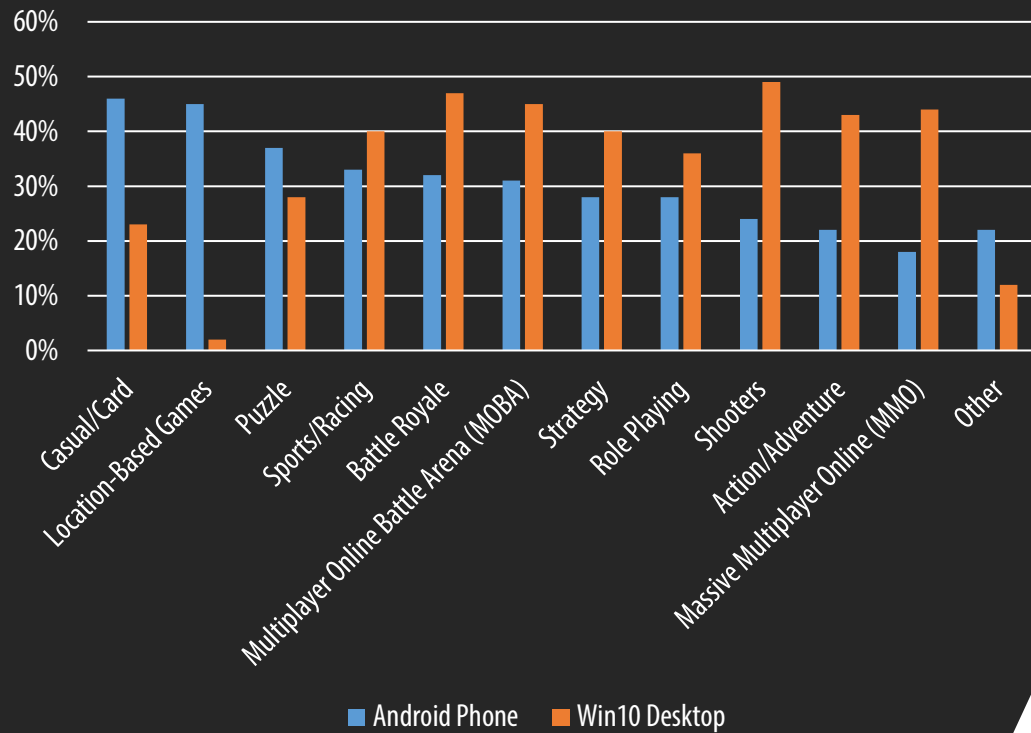
US  
Men

Top 5 Gaming Devices	% Who Use for Gaming
Win 10 Desktop	48.3%
Android Phone	47.6%
iPhone	37.0%
Android Tablet	32.4%
Win10 Laptop	28.0%

Top 5 Game Genres
Sports/Racing
Shooters
Action/Adventure
Multiplayer Online Battle Arena (MOBA)
Battle Royale

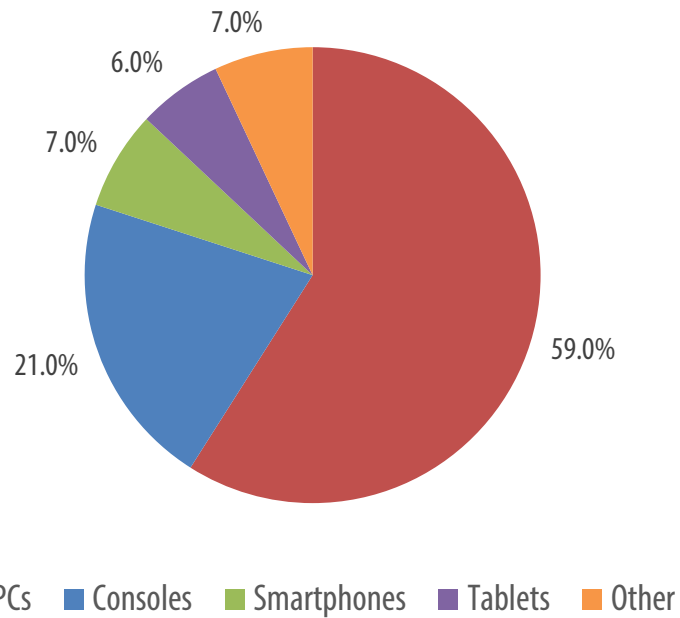
# Different Games on Different Devices

## Top Game Genres by Device

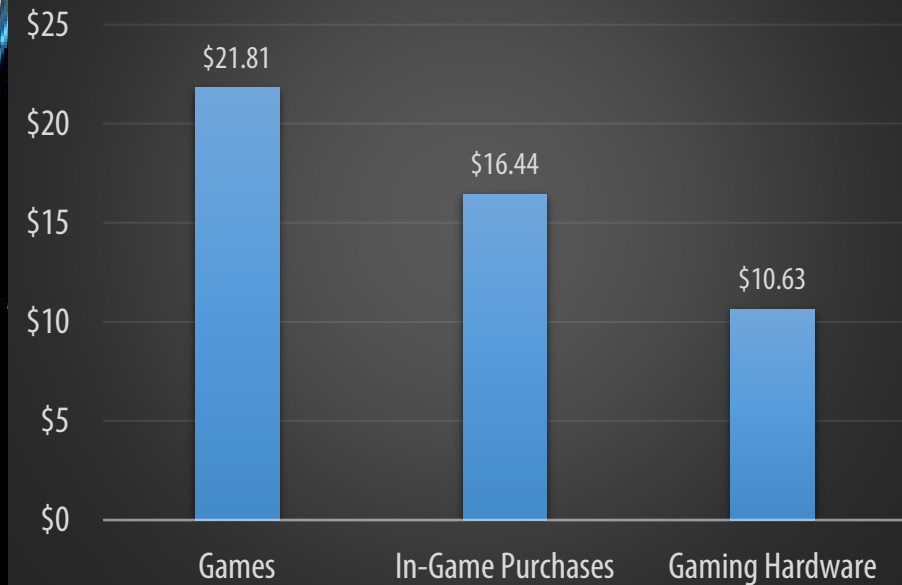


# Game Spending Still Dominated by PCs

US Monthly Gaming Spend by Category

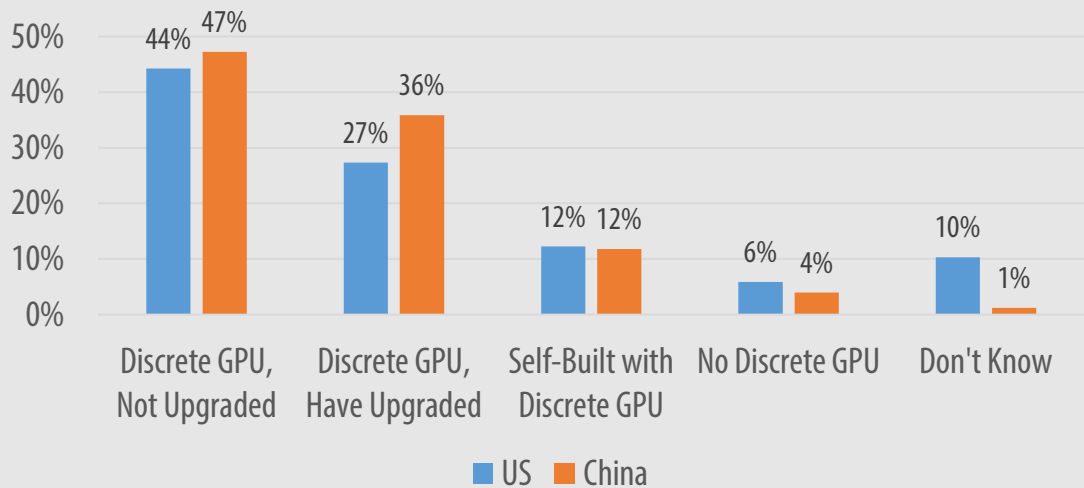


US Average Monthly Gaming Spend Per Device

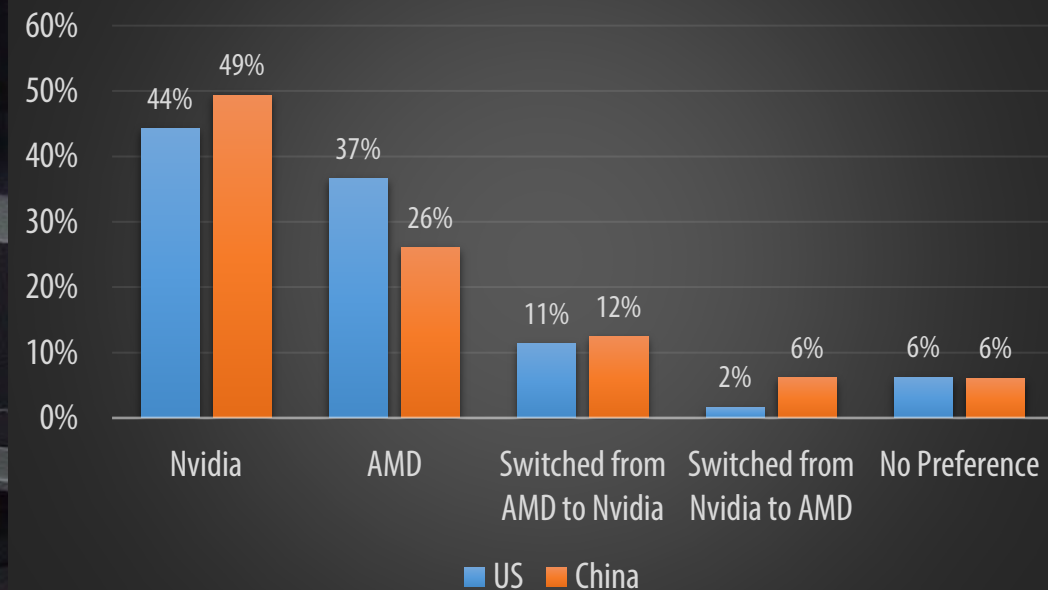


# Desktop GPUs Still Matter

## Desktop GPU Usage

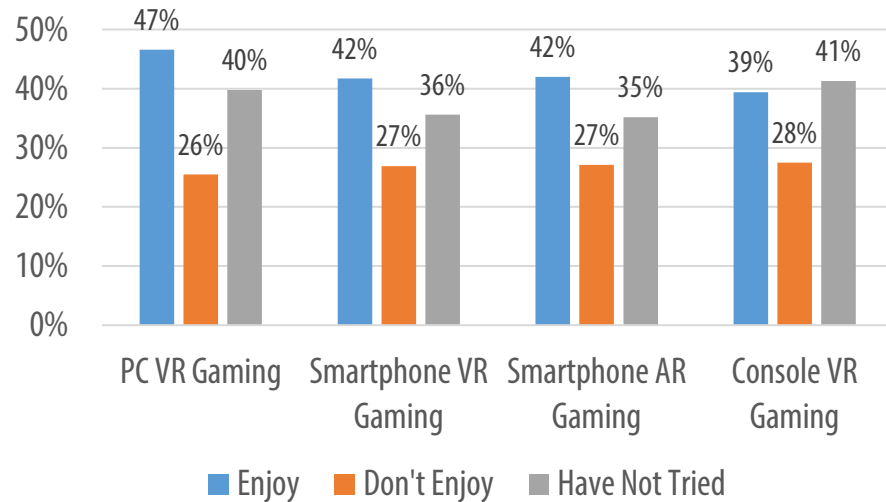


## GPU Brand Preferences



# AR and VR Gaming Won't Save the Category

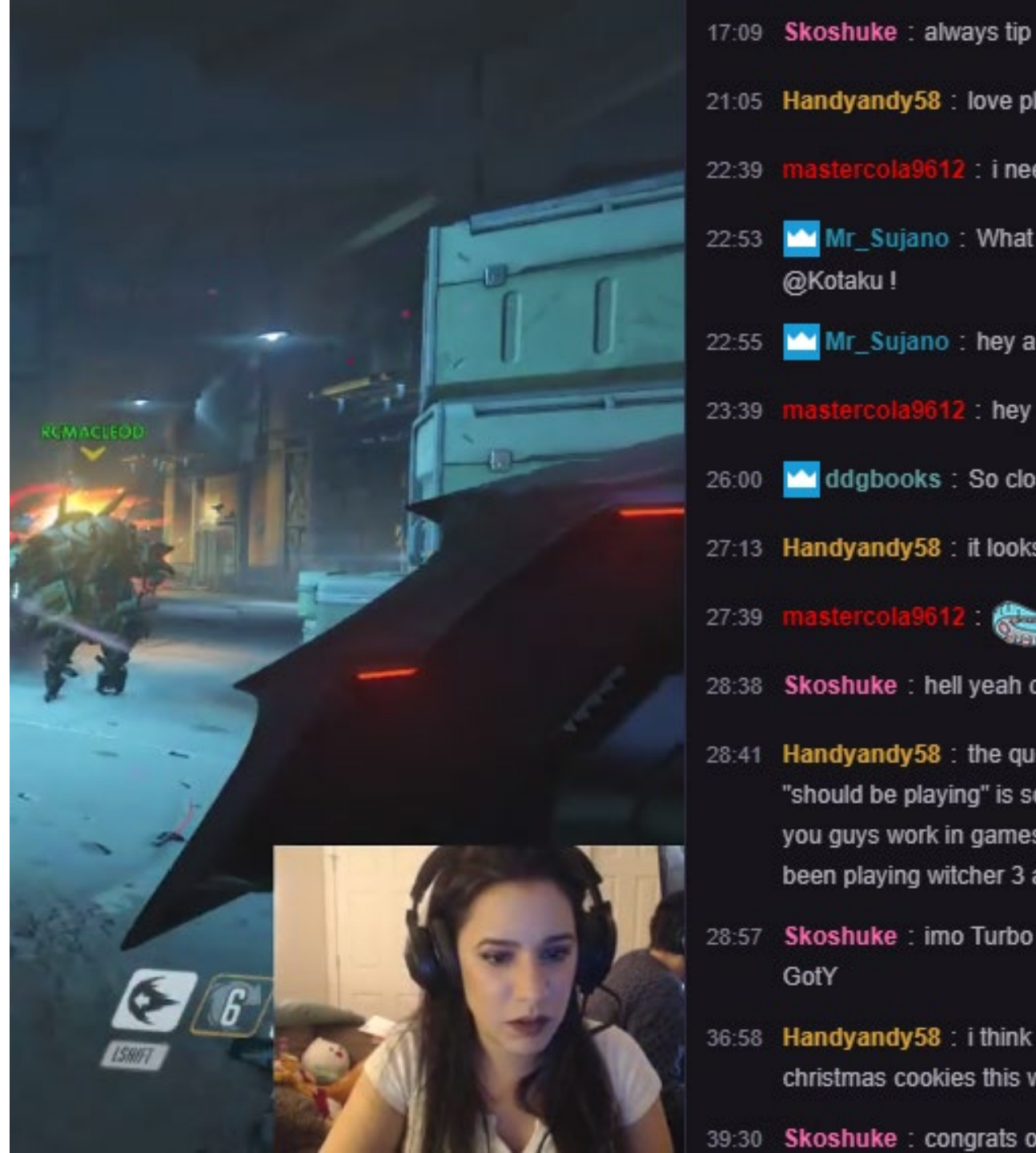
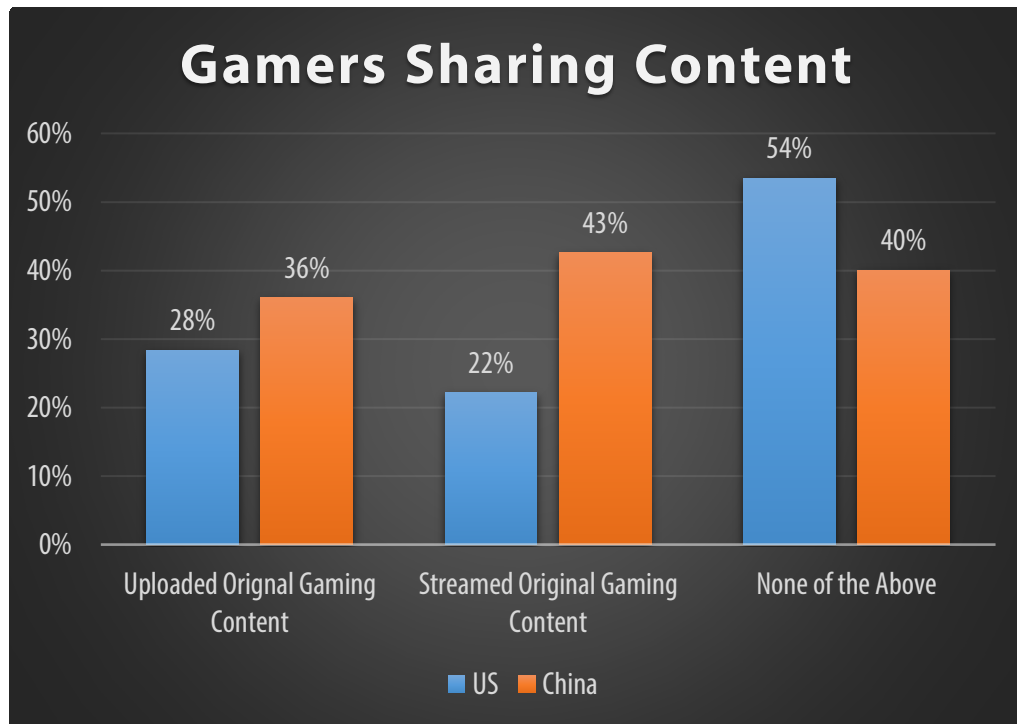
US AR/VR Gaming Experience



- Surprisingly large percentage don't enjoy VR gaming



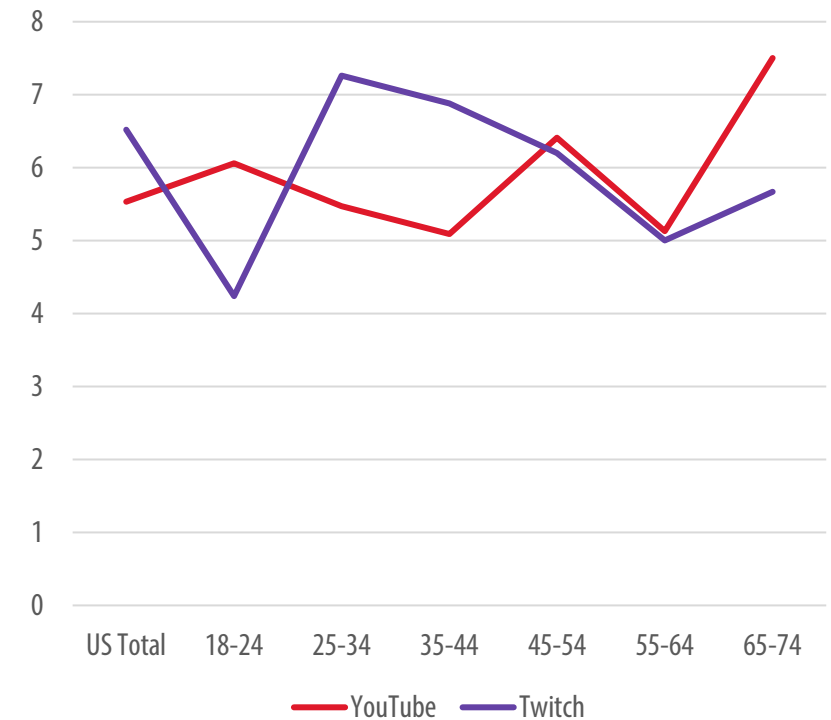
# Game Streaming and Content Sharing Going Mainstream, Particularly in China



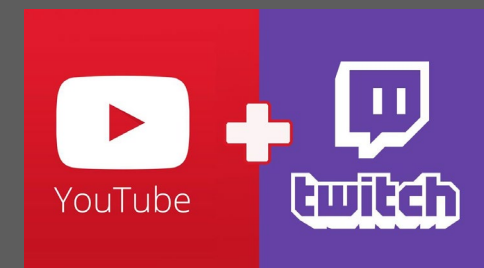
## Outcomes from Game Content Viewing      % of US Gamers

Spend more time gaming on smartphones	35.4%
Spend more time gaming on PCs	32.3%
Spend more money on smartphone gaming overall	27.4%
Play new games that I've seen	26.6%
Spend more money on PC gaming overall	25.7%
Spend less money on smartphone gaming overall	18.3%
Spend less money on PC gaming overall	17.0%
Spend less time gaming on PCs	15.9%
Spend less time gaming on smartphones	15.6%
Buy and use specific hardware brands I've seen	12.1%
Other	0.6%
No Impact	24.3%

## Weekly Viewing Hours by Age

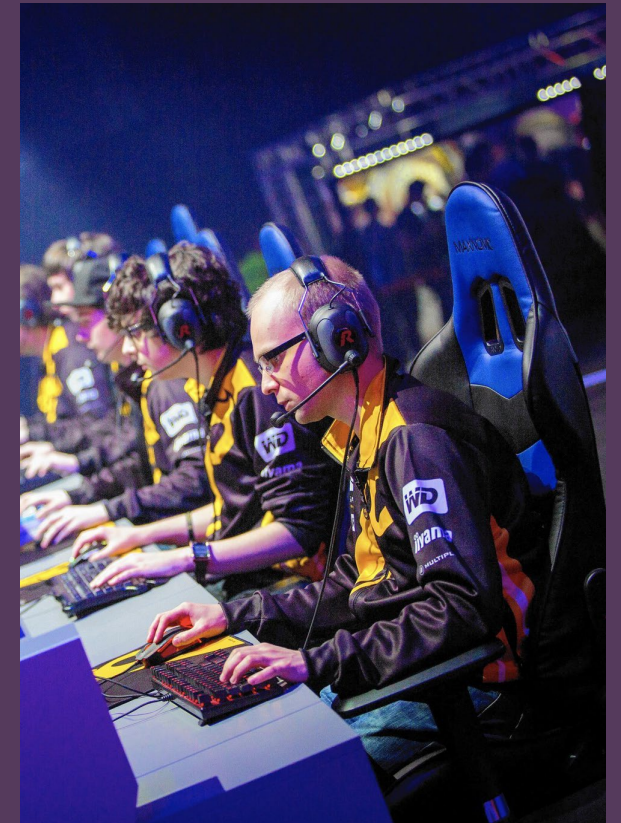
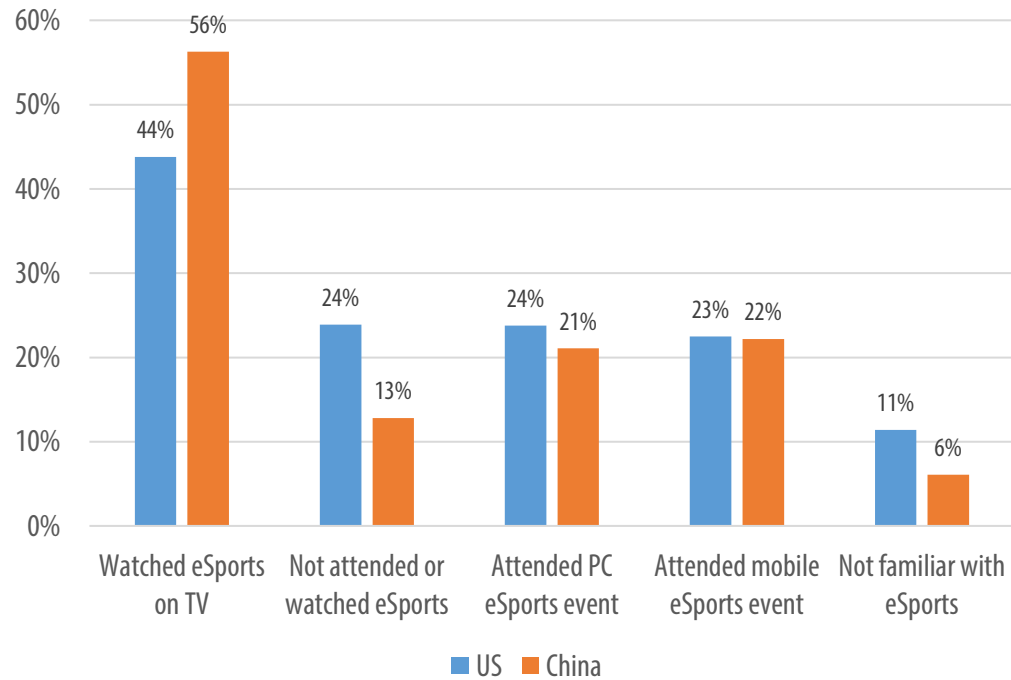


**Game Content Viewing High  
Across Age Groups and  
Impacting Purchases**



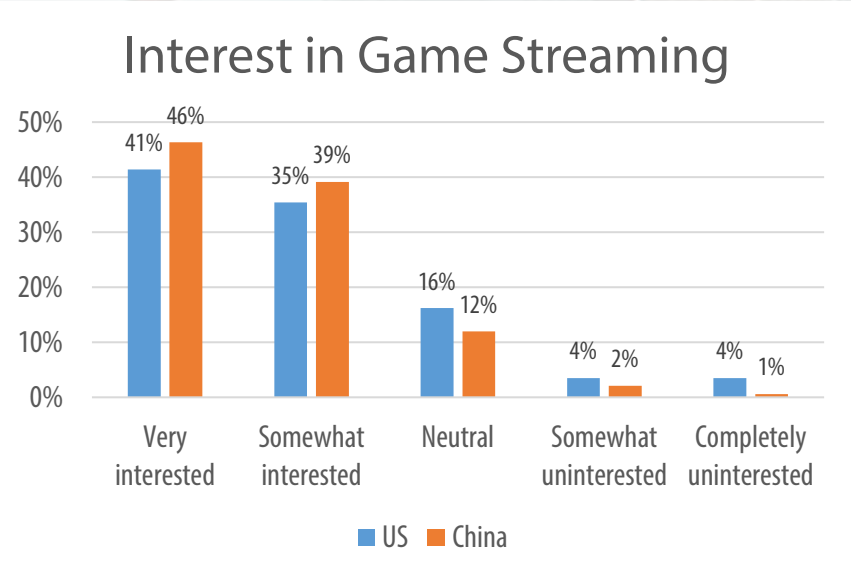
# eSports Interest also High, Particularly in China

## eSports Involvement





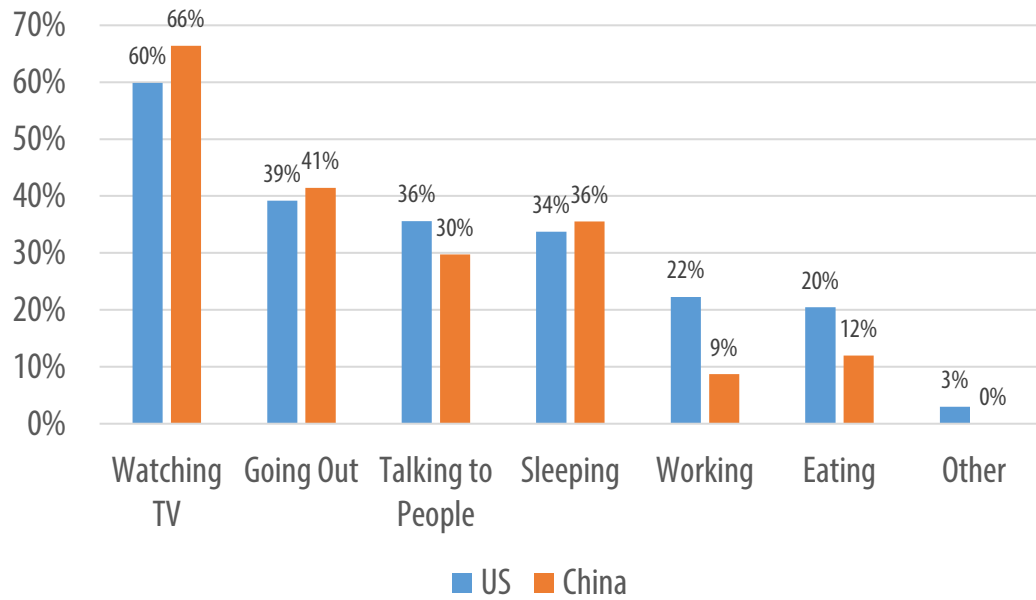
# Cloud-Based Game Streaming Opportunity is Large



- US Consumers Willing to Pay Over \$16/Month

# Social Impact of Gaming

## Activities Being Reduced for Gaming



# Final Thoughts

- Gaming market continues to be robust across multiple platforms and devices
  - Consumers quickly growing accustomed to multi-platform offerings, but want them to be complete
  - Strong opportunity for game streaming
- Graphics quality and performance still critical for PCs and other devices
  - Smartphone gaming growth due in part to major improvements there
- Gaming content and competitions are strong drivers to increase gaming
  - The time and money spent on gaming dwarfs most all other consumer activities
- Many unique interests in devices and genres across different demographics
  - Lots of opportunities for different types of games



# Contact



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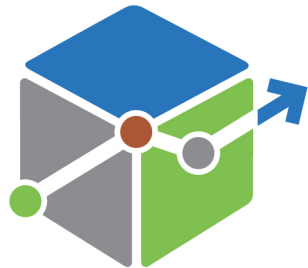
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*A complete 172-slide version of the Multi-Device Gaming report with full details from the study is available for purchase. Please contact Bob O'Donnell for additional information.*



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