



Vorhaus Digital Strategy Study

Digital Strategy Study: All Findings

August 2025

Table of Contents

	page
Methodology	2
Entertainment	3
Television Viewing Behavior	7
Connected TV	13
Amazon	22
Video Creator Content & Social Media	18
SVOD & OTT Viewing	25
Digital Video	30
Live Streaming Video	34
Messaging	41
Gaming	50
Cloud Gaming	62
Creator Content	68

	page
Game Creation Platforms	72
Mobile Gaming	76
Virtual Goods & In-App Purchases	87
Technology	91
Metaverse	93
Augmented Reality	98
Virtual Reality	102
Cryptocurrency	106
Smartphone	112
Augmented Reality Games	118
Privacy Concerns	120
Classification	122

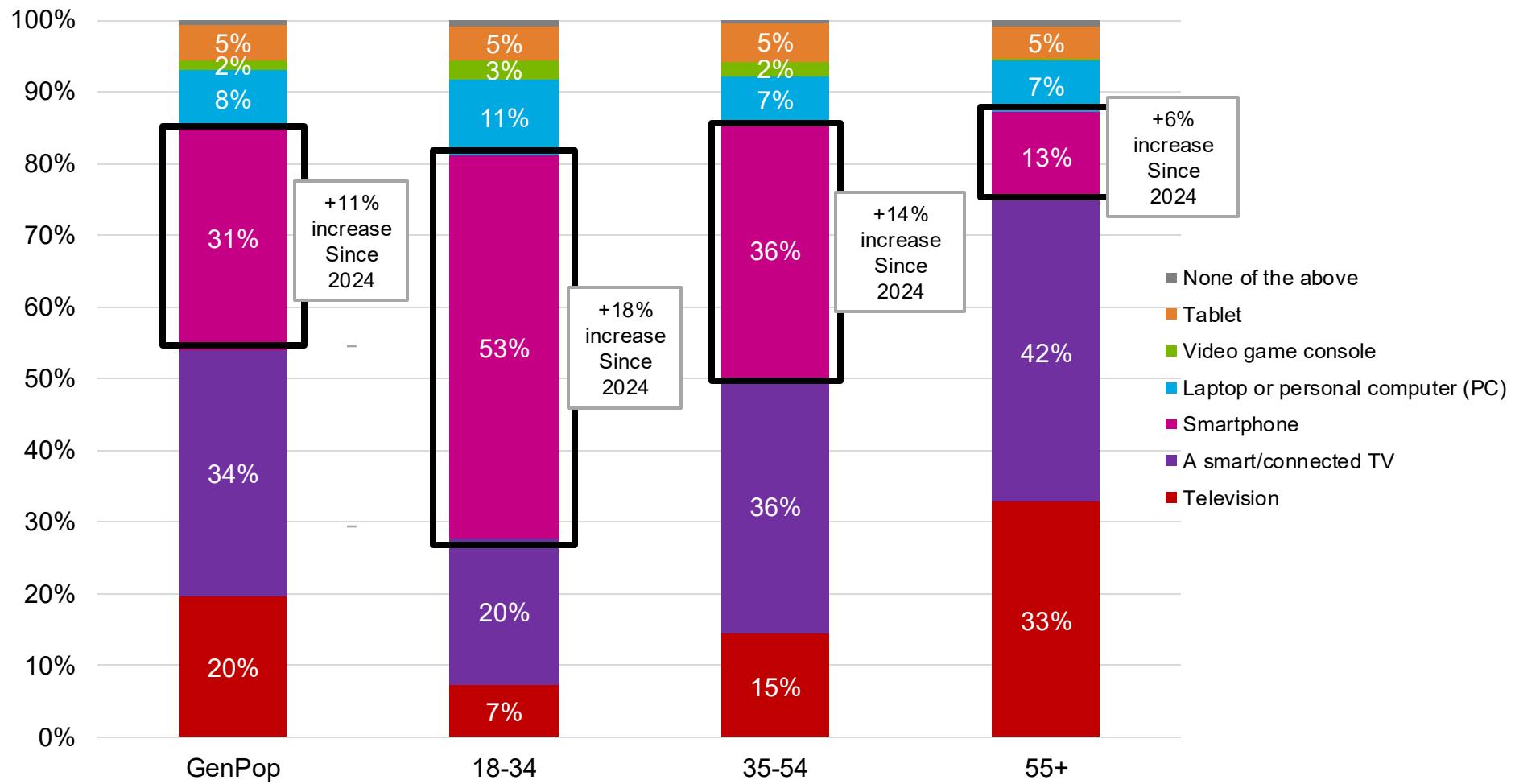
- Nationally representative online survey of **N=2,000** (Margin of error ± 2.2%)
 - Ages 18+
 - Sample matched to the U.S. Census for age, gender and race
 - Study focus: media attitudes and behaviors of consumers on a broad range of topics
 - Data collected May 28th to June 18th, 2025.
 - Average survey length 18 minutes
 - Respondent recruitment completed by a high-quality online research panel and data collection firm.

Entertainment

Connected TVs have replaced television as a primary medium for entertainment.
Smartphones are still growing year over year as a primary source of entertainment.

4

Primary medium for entertainment

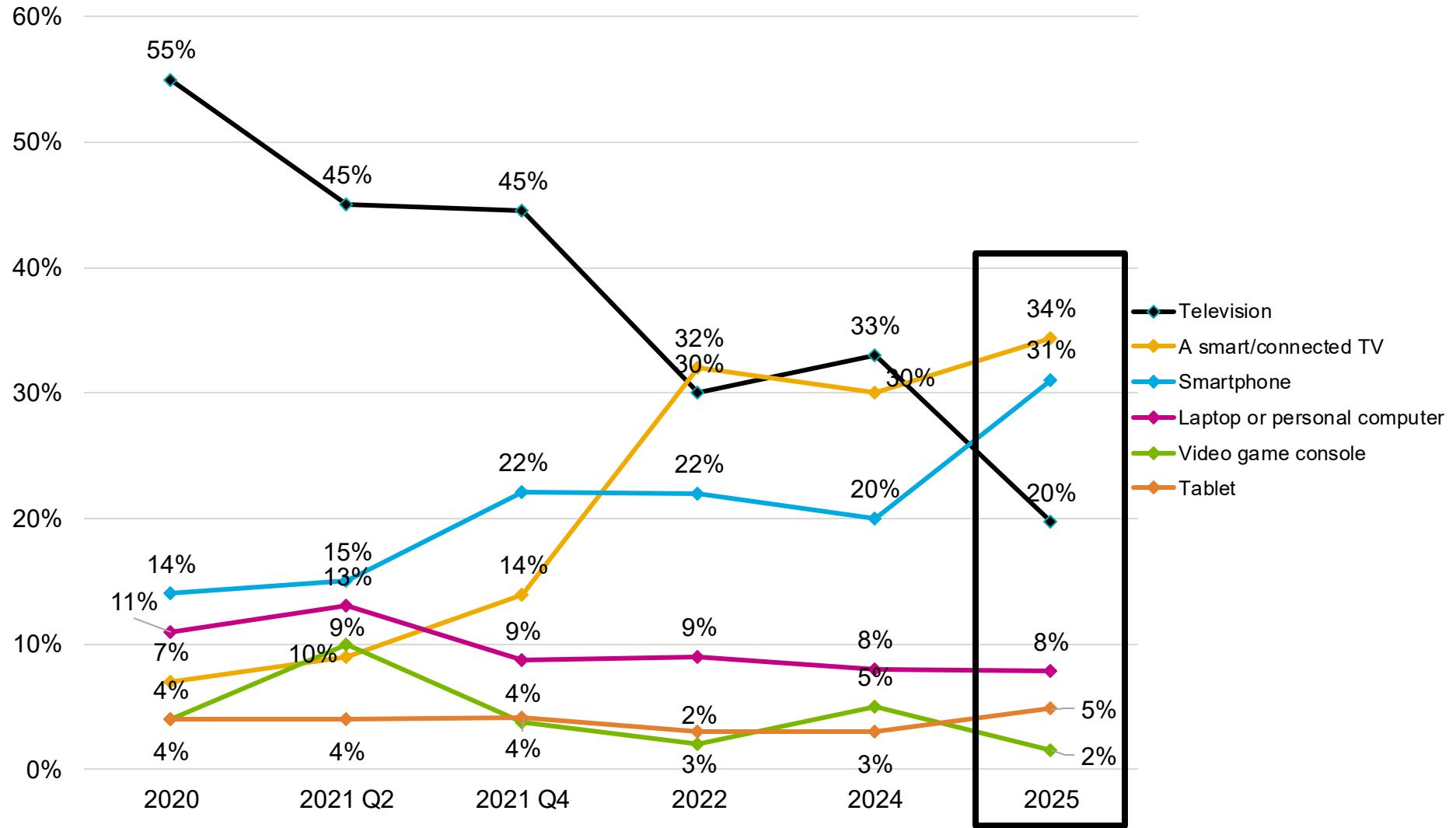


q12: What is your primary medium for entertainment? (N=2,000)

For the first time in the last 5 years, smartphones and smart/connected TVs have overtaken Television as Americans most popular entertainment devices.

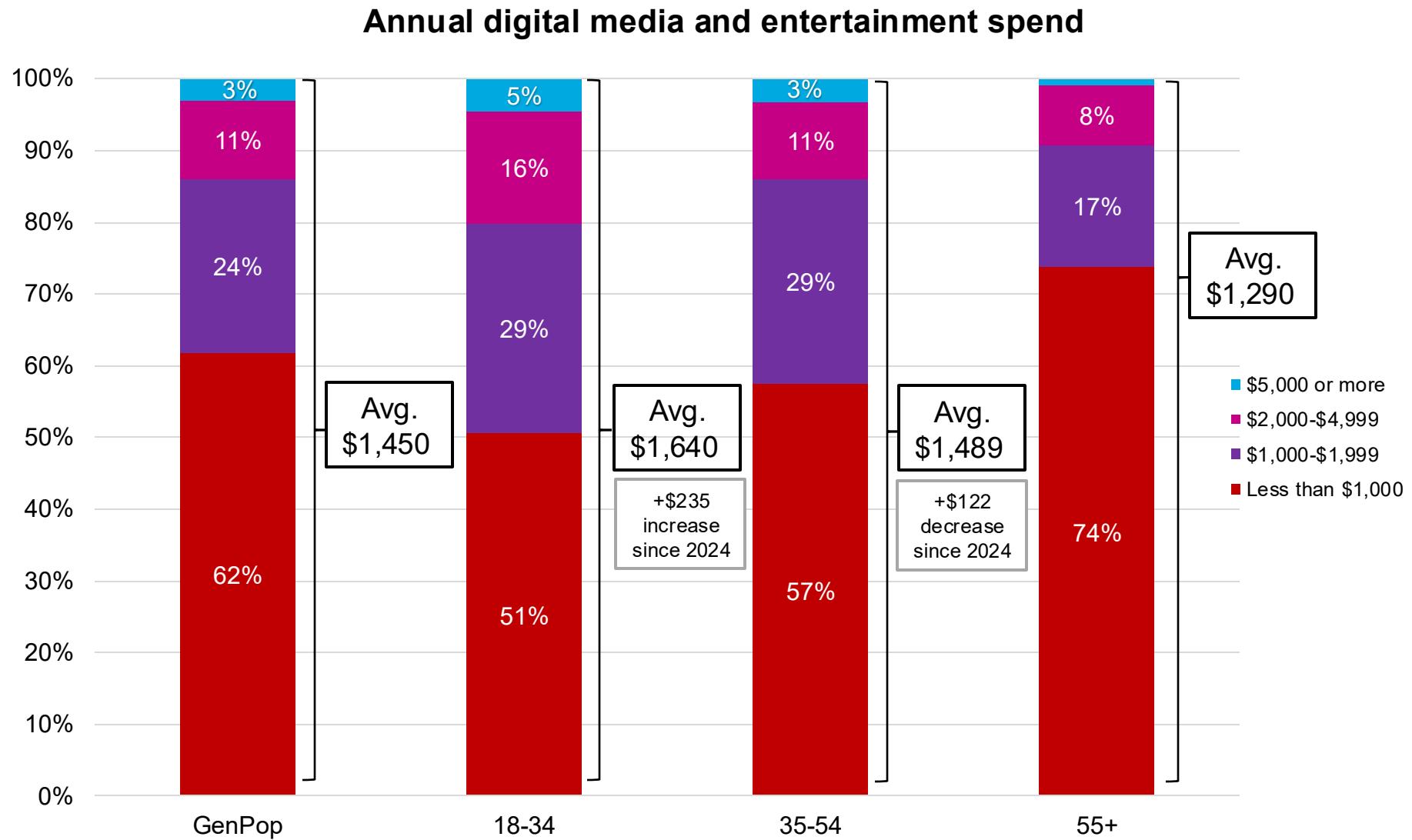
5

Primary medium for entertainment tracked over time – Total



q12: What is your primary medium for entertainment? (N=2,000)

Those ages 55+ still spend significantly less on digital media and entertainment compared to those under 55. The average annual digital media spend for those 18 to 34 has increased \$235 since 2024.



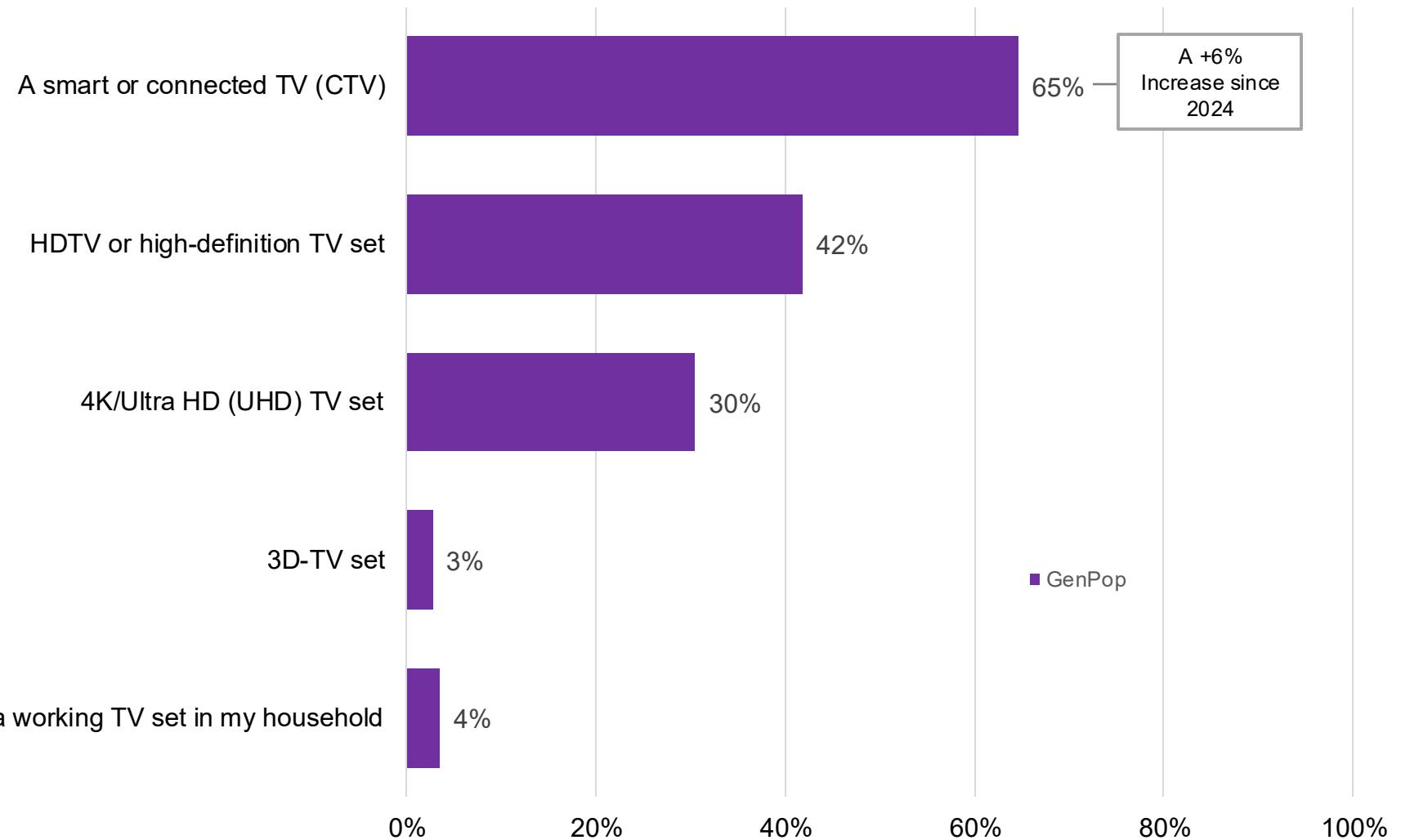
q13: Overall, how much do you think you spend in an average year on digital media and entertainment, including games, video, movies, music, audio, text, etc.? (N=2,000)

Television Viewing Behavior

Television technology in household has been pretty consistent with little change since 2022.

8

Television technology in household

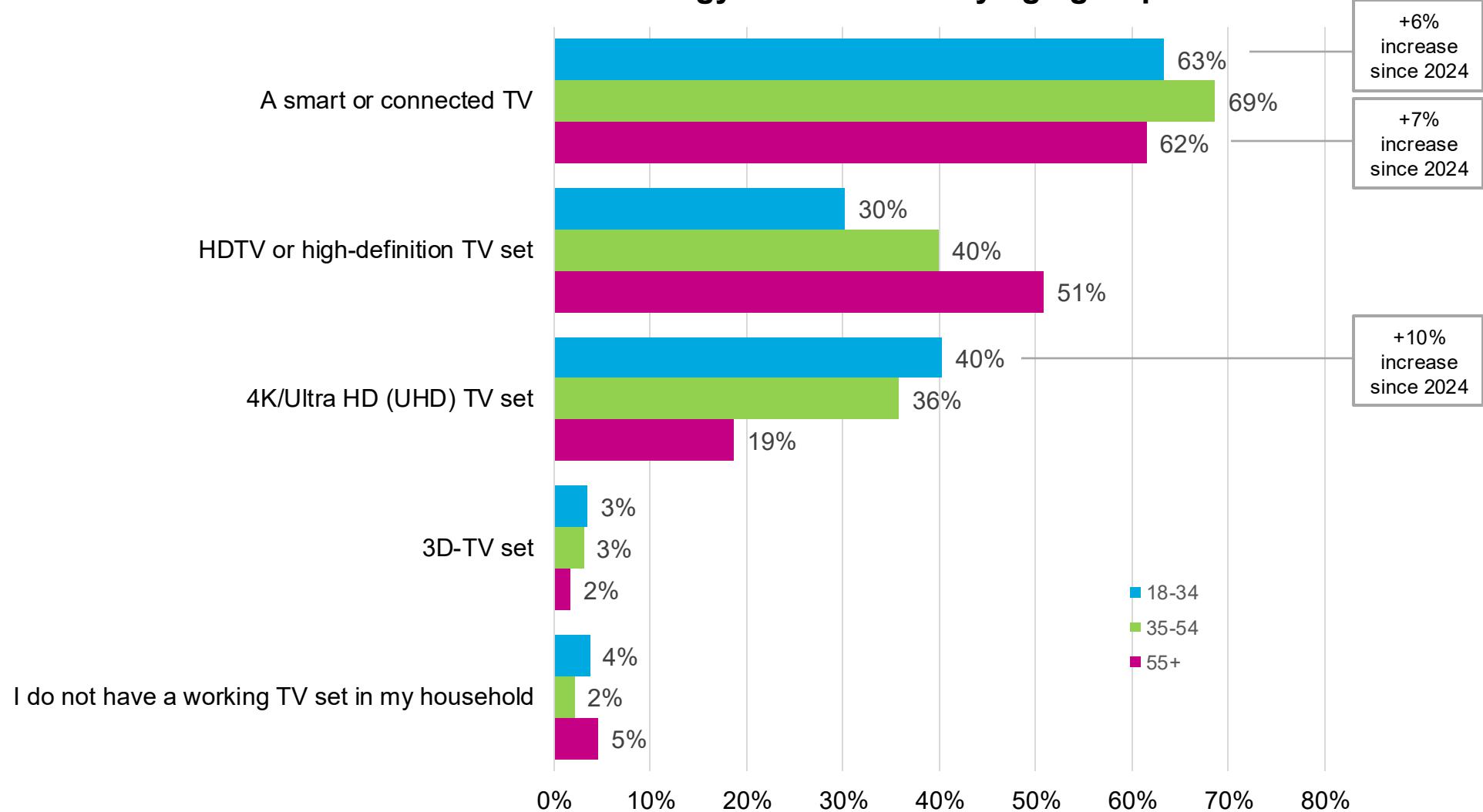


q18: Which of the following do you have in your household? (N=2,000; multiple response)

Nearly two-thirds of all Americans now have a smart TV in their home. All ages are more likely to have smart TVs. Those 55+, even more likely. There was also a 10% increase in 4K/Ultra HD adoption among those under 35.

9

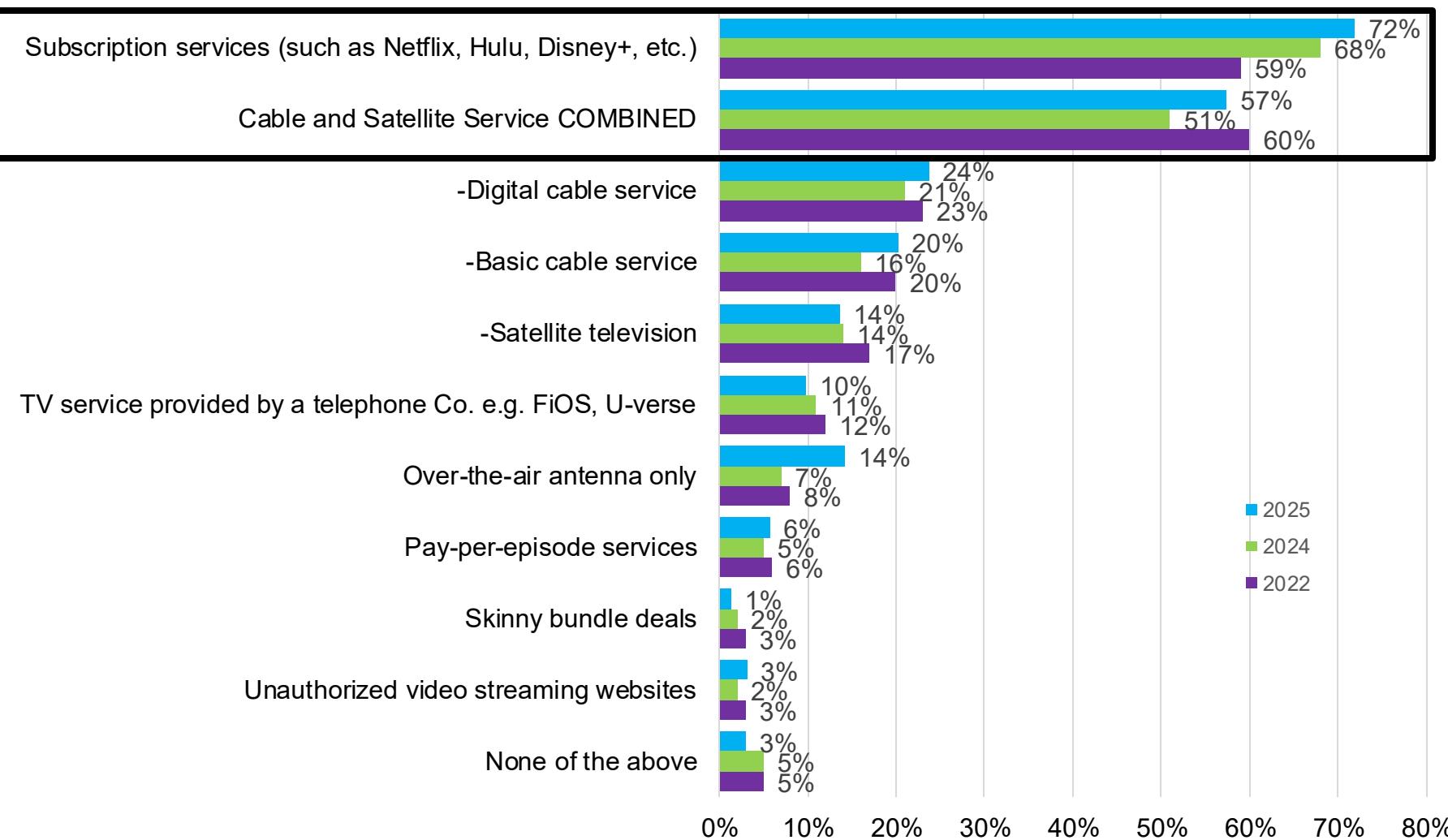
Television technology in household by age group



q18: Which of the following do you have in your household? (N=2,000; multiple response)

Subscription services are now more popular than cable.

Television access in household

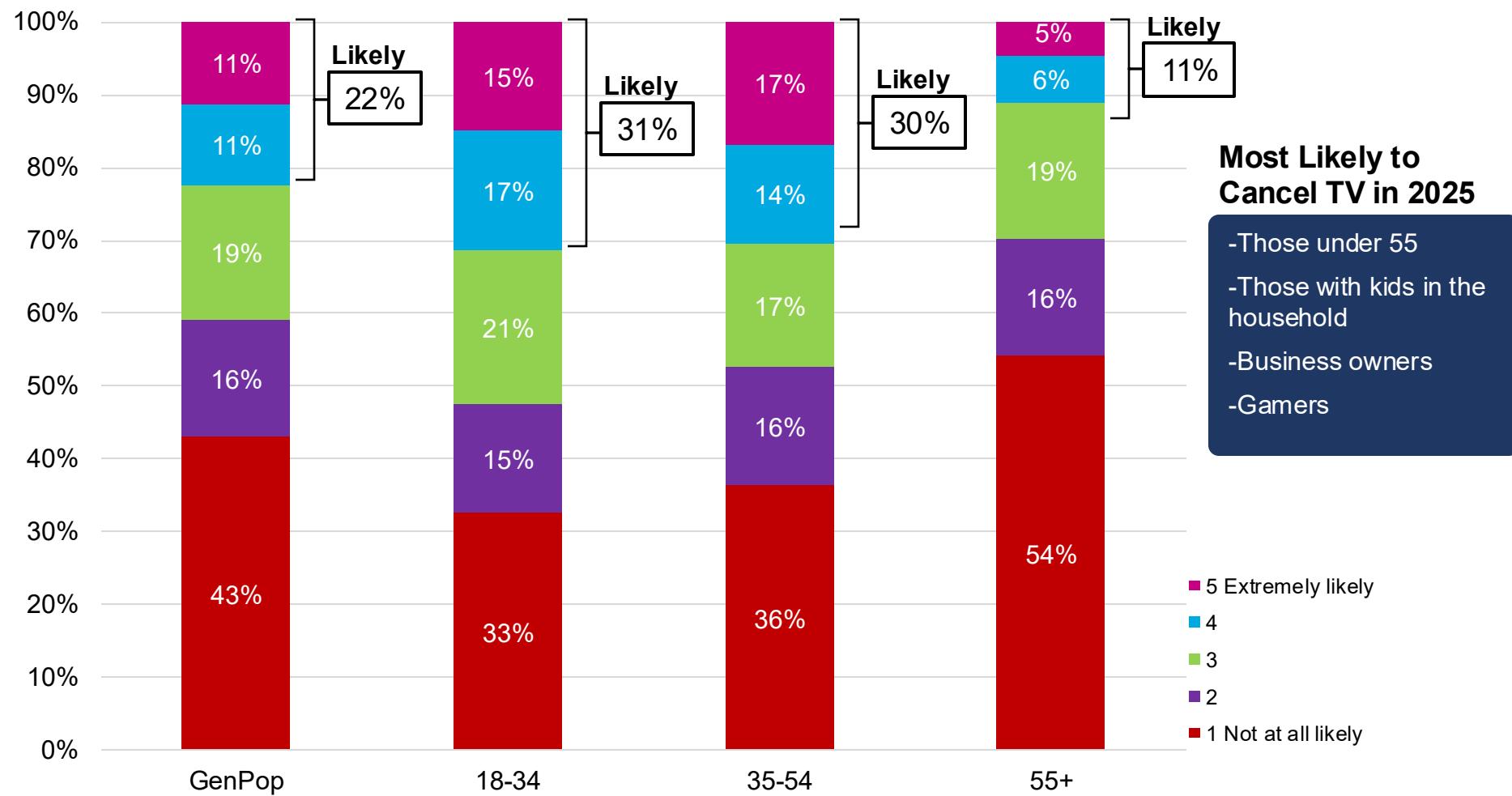


q19: How do you access your television programming at home? (N=2,000; multiple response)

22% of Americans are likely to cancel their pay TV service in the next year. There were no significant increases or decreases present year over year.

11

Likelihood to cancel pay TV service in the next 12 months

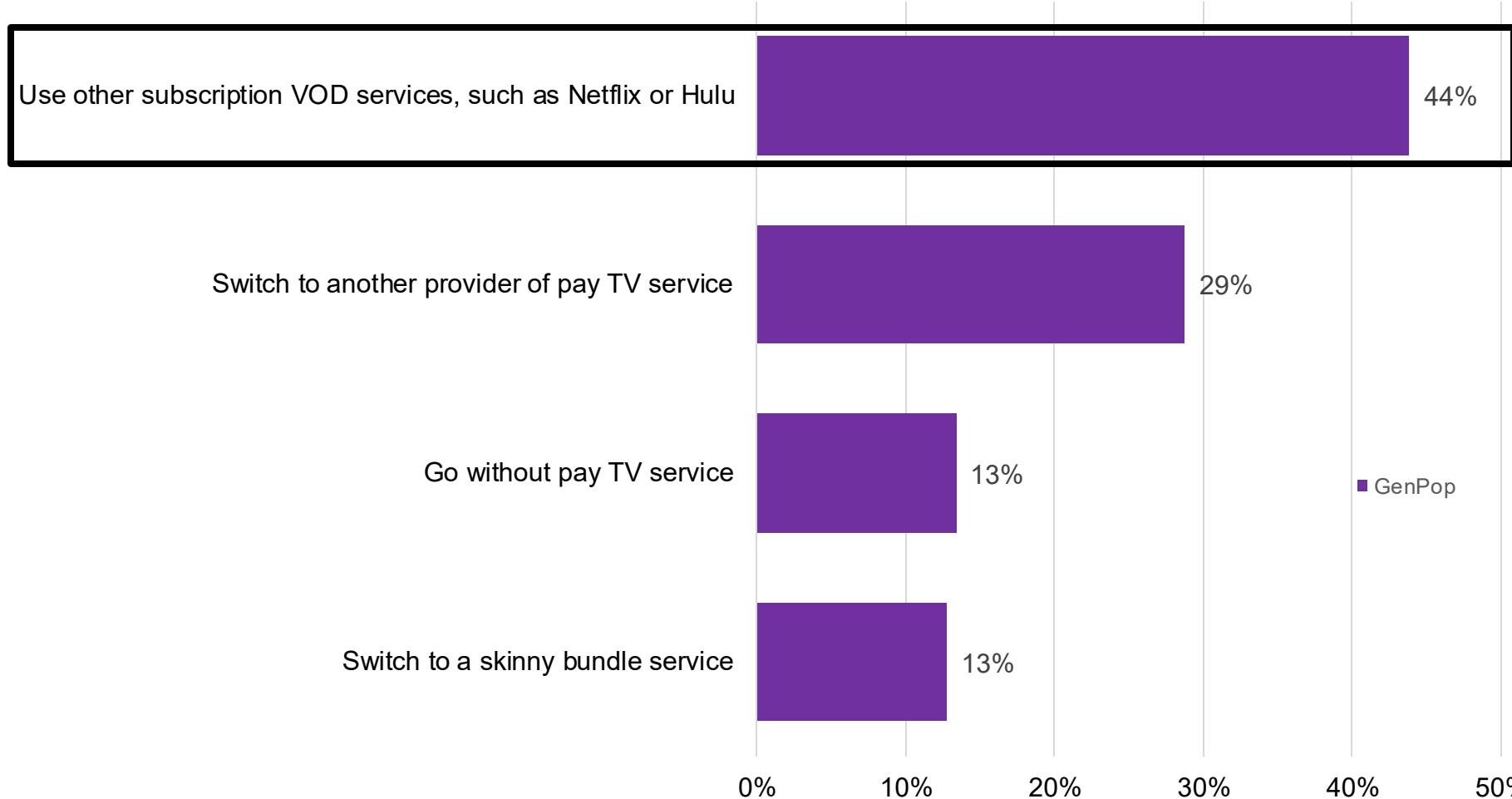


q20: How likely are you to cancel your cable or satellite pay TV service in the next 12 months? (Among those who pay for streaming services; N=1,128)

After cancelling pay TV services, 44% will turn to other VOD subscription services and 29% will switch pay TV providers. Percentages are consistent with 2024.

12

Plans after cancelling pay TV service



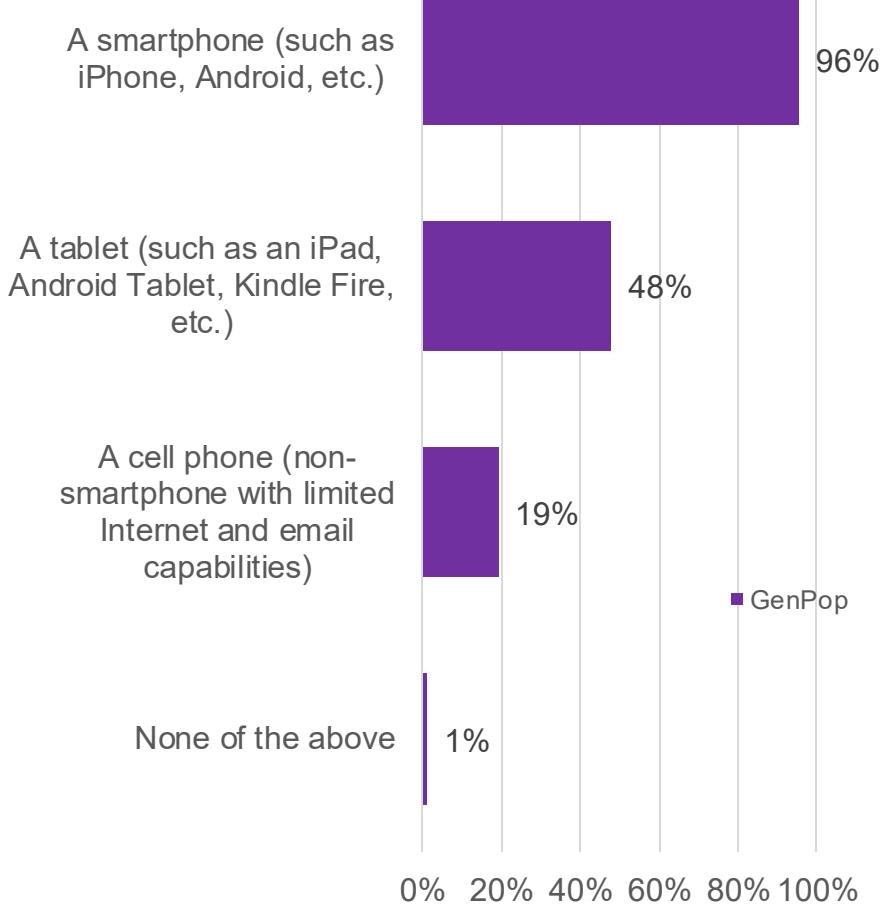
q21: If you cancel your current pay TV service in the next 12 months, which of the following are you most likely to do? (Among those who are somewhat likely to cancel TV service in next 12 months N=462)

Connected TV

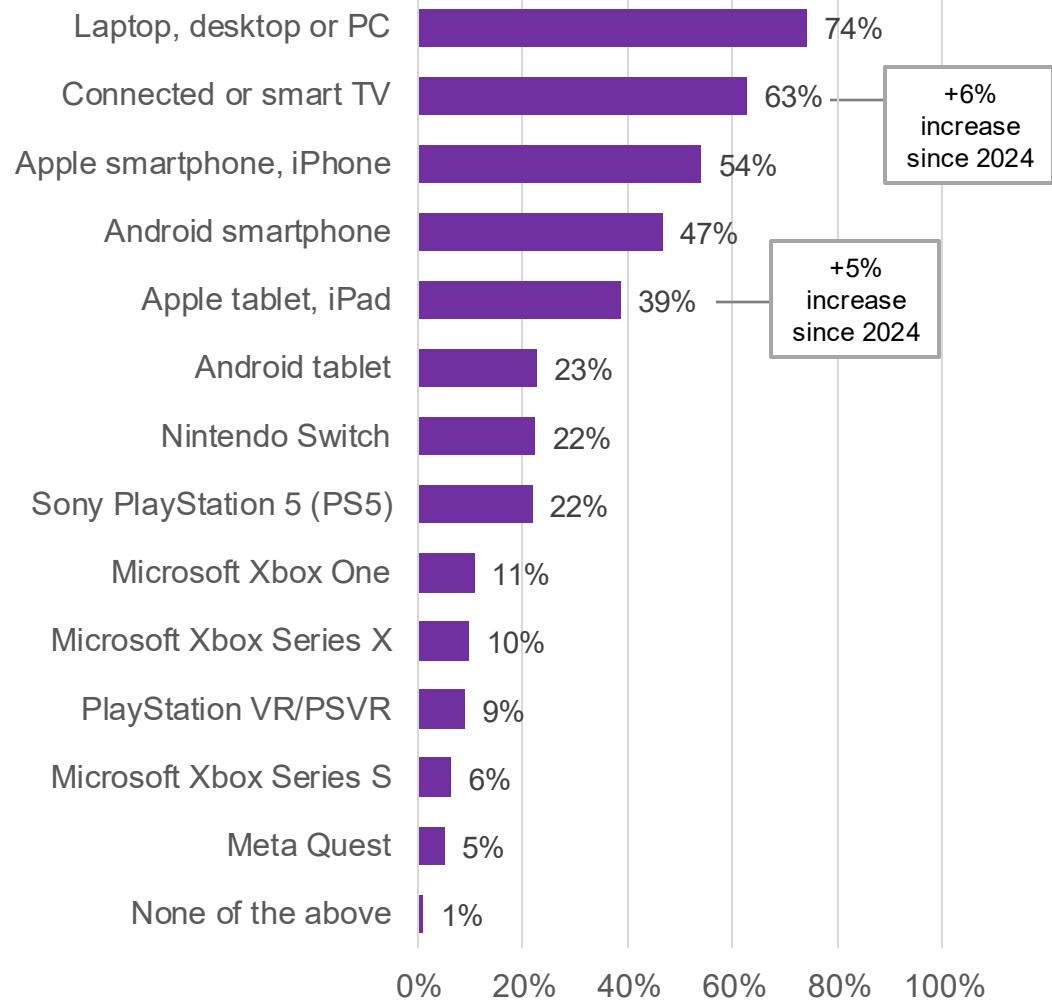
96% of Americans have a smartphone, half have a tablet. 63% of households have a connected or smart TV, up 6% since 2024. iPad ownership is up 5% year over year.

14

Devices Used At Least Once Per Week



Devices in Household



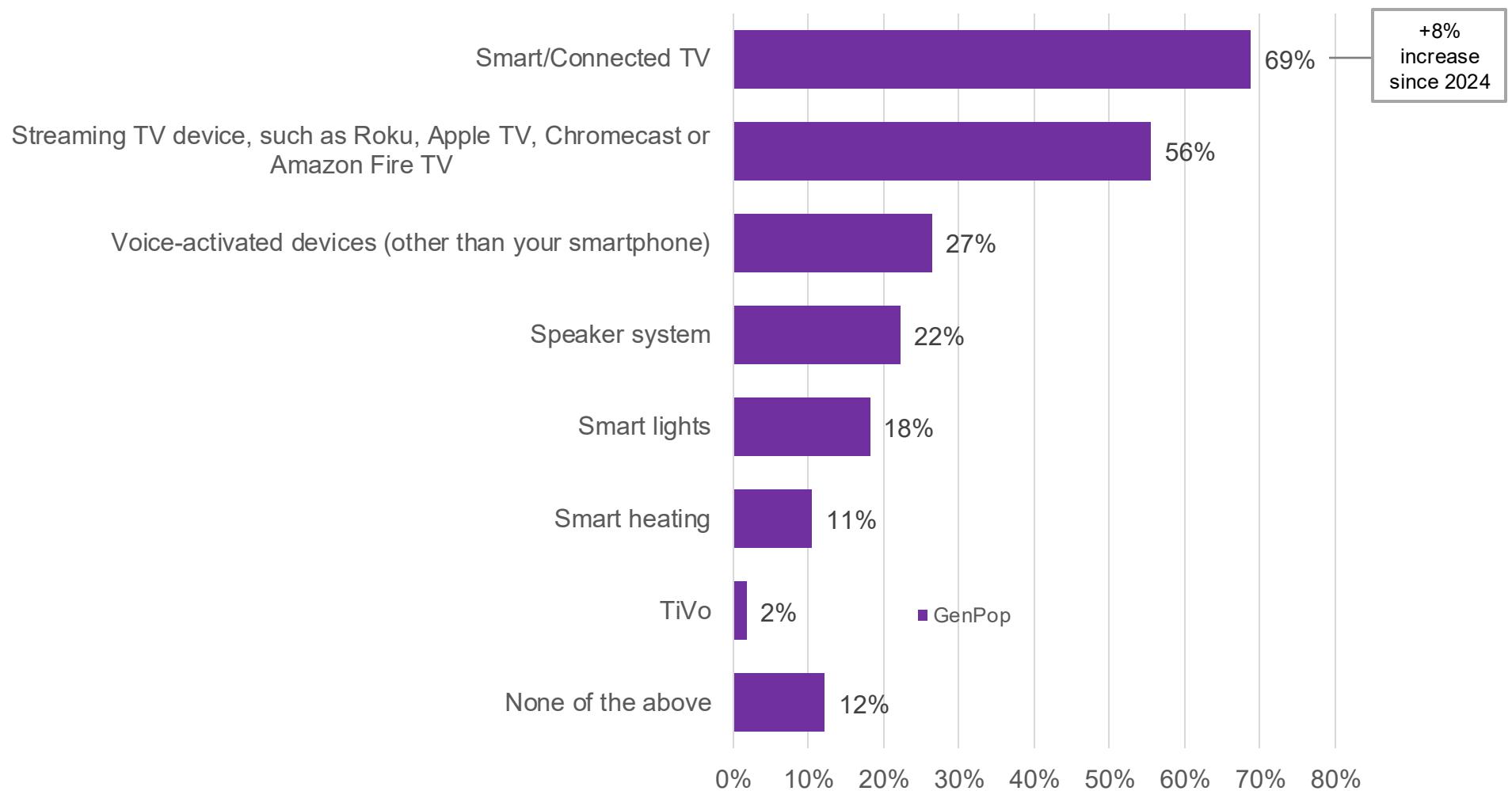
q9: Which of the following do you use regularly (at least once per week)? (N=2,000; multiple response)

q10: Which of the following do you or someone in your household own? (N=2,000; multiple response)

There are 4% more connected devices in American households compared to 2024.
69% of American households have a smart or connected TV, up 8% since 2024.

15

Connected Devices in Household

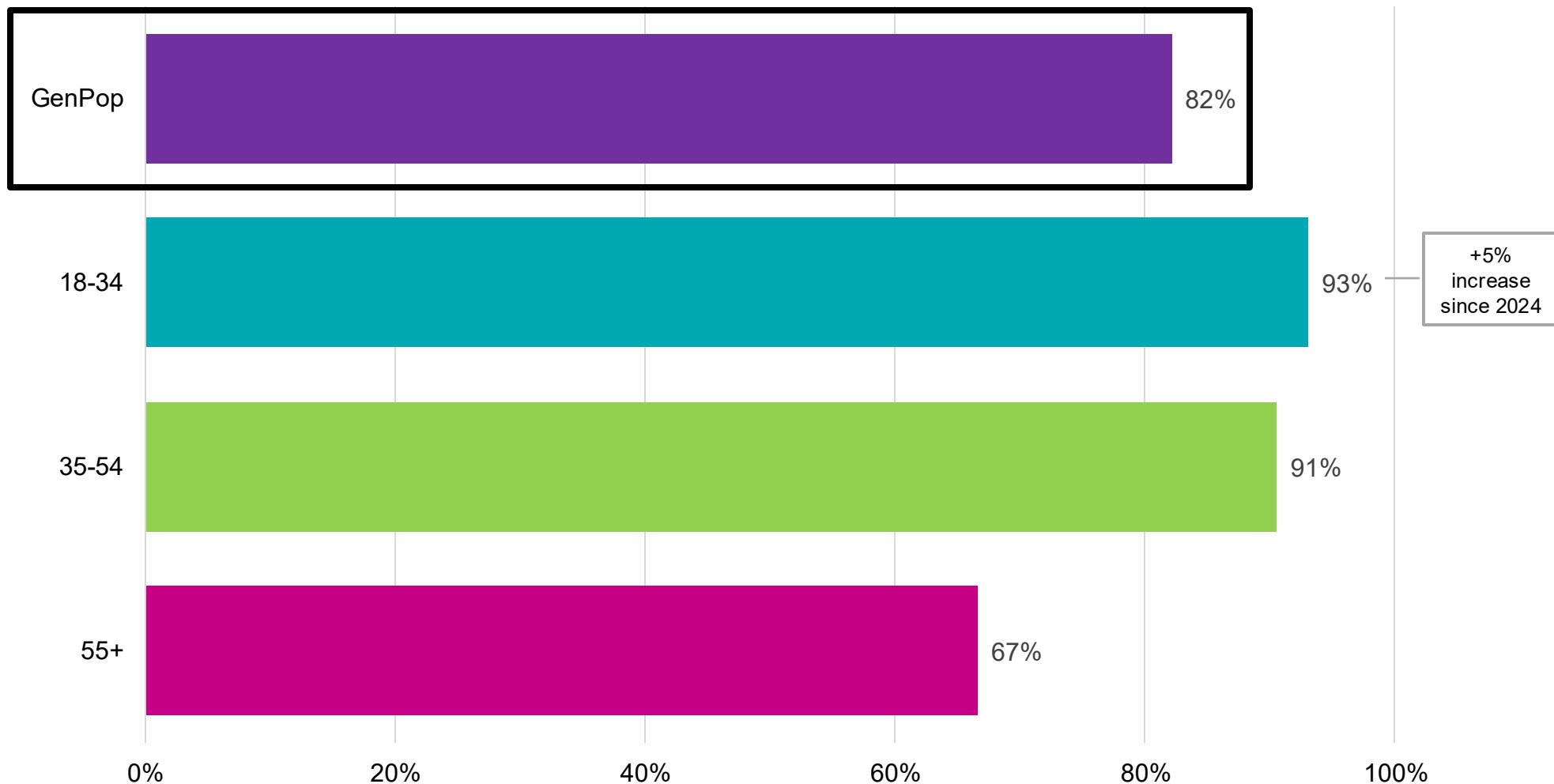


q11: Which of the following devices do you have in your home that are connected to your home Wi-Fi? (N=2,000; multiple response)

82% of Americans connect their TVs to the Internet, which is just 2% higher than 2024 driven by those 18 to 34.

16

Those who connect their TVs to the Internet

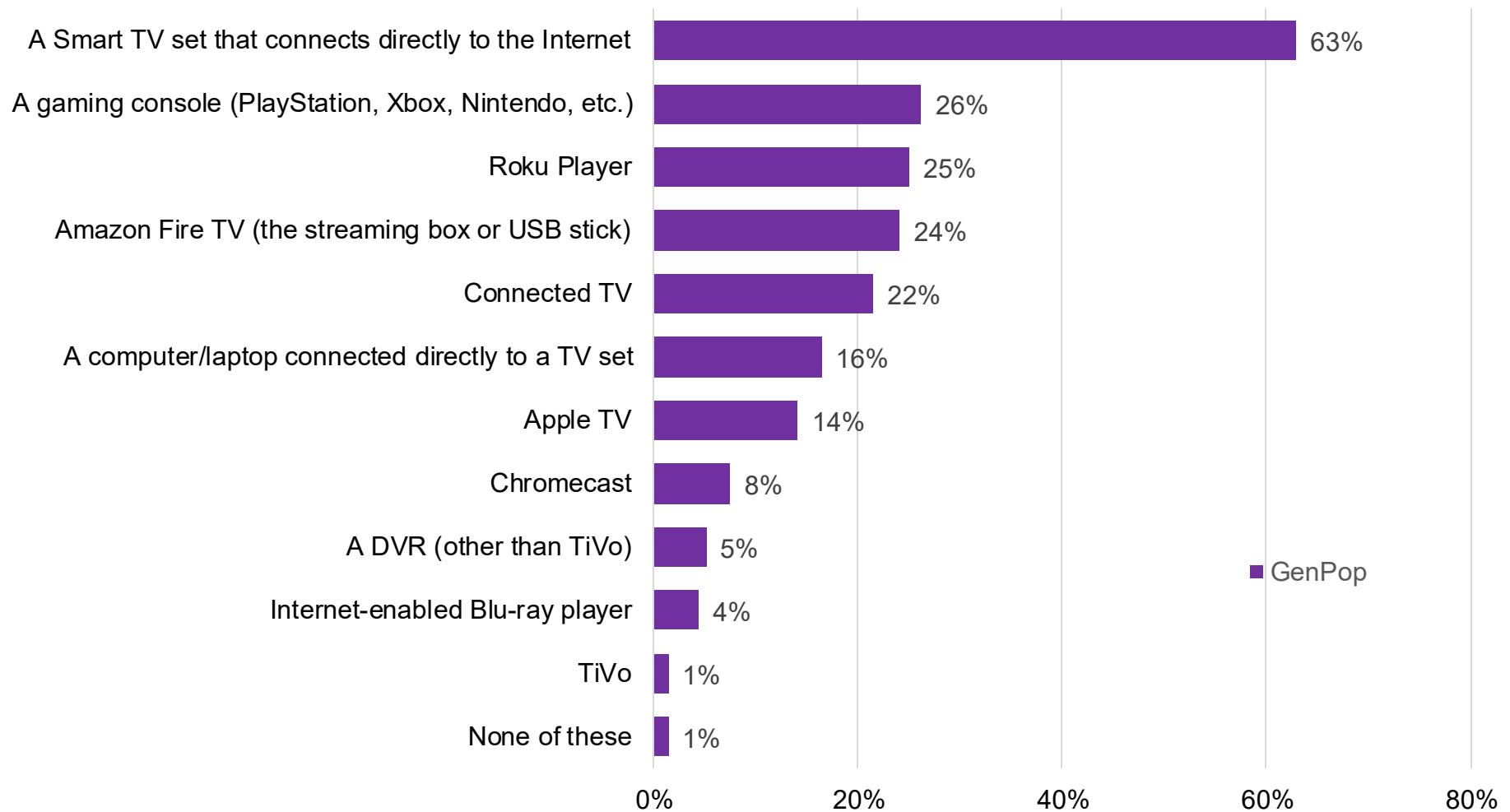


q24: Do you ever connect your TV to the Internet? (N=1,921; Those who said “don’t know” or “don’t have a working TV” n=23)

Smart TVs remain the most popular devices for connecting TVs to the Internet.
Percentages are all within 2% of 2024.

17

Ways people connect their TV to the Internet



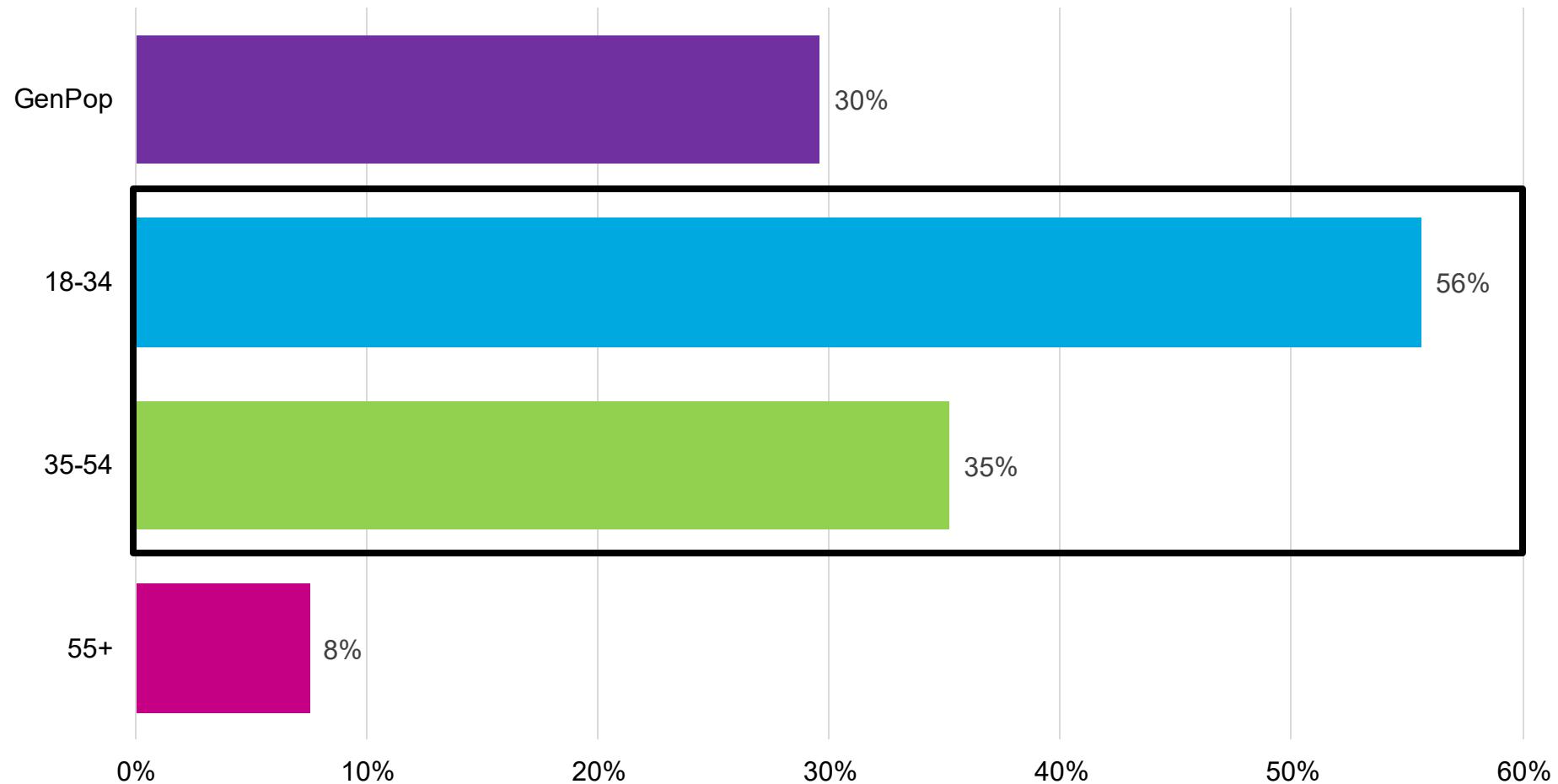
q25: In which of the following ways do you ever connect your TV to the Internet? (Among those who connect their TVs to the Internet N=1,578; multiple response)

Video Creator Content & Social Media

The population of video content creators in America is 30%. There were no significant increases or decreases year over year.

19

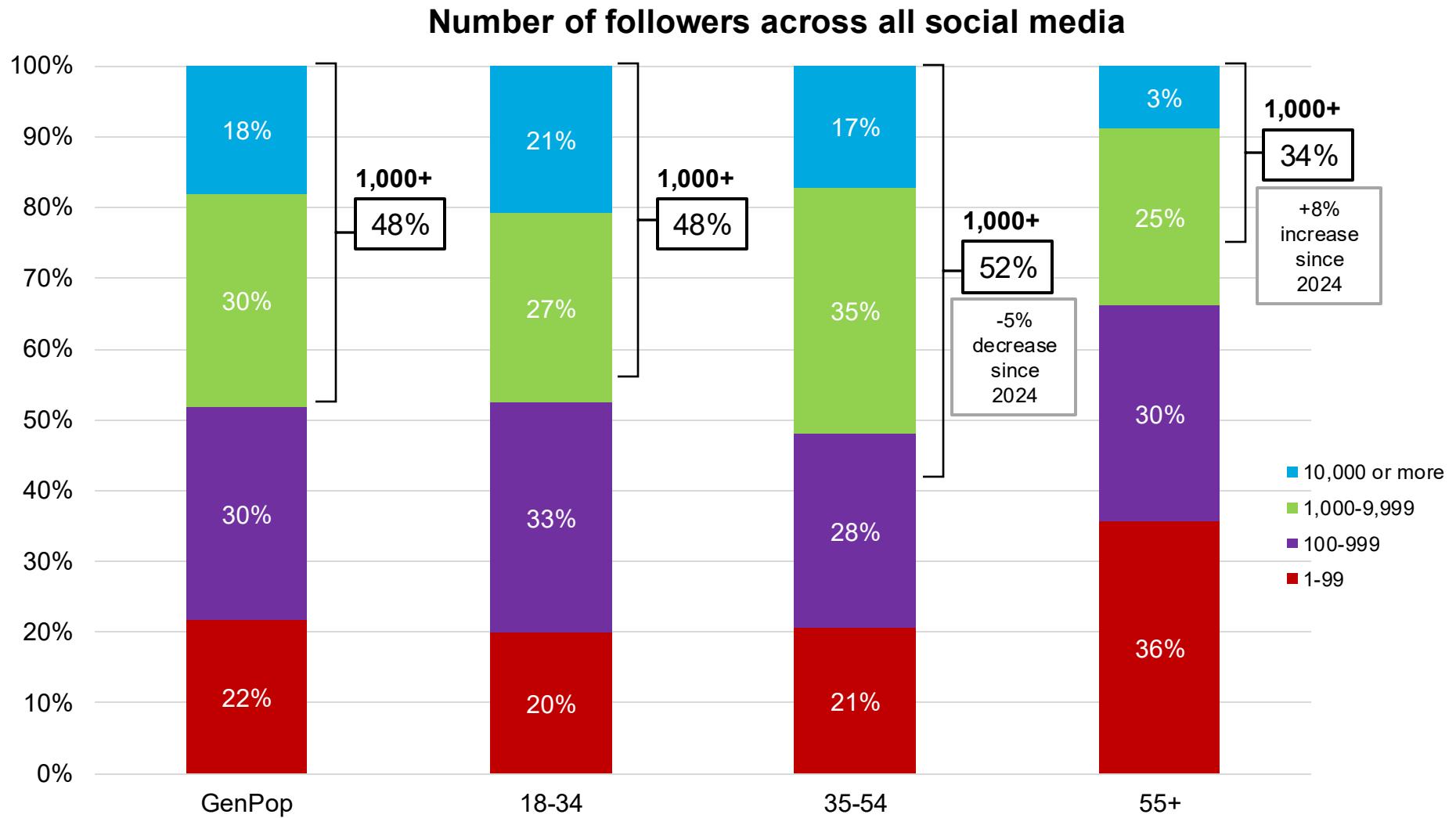
Have created video content for the Internet



q52: Have you ever created video content specifically for the Internet such as YouTube videos, TikTok, Snap Video, animations , short films, etc.? (N=1,969; Those who said "Not sure" n=31)

48% of Americans have 1,000+ followers across social media. This year there were 34% of those 55+ who reported having 1,000+ followers. Up 8% since 2024.

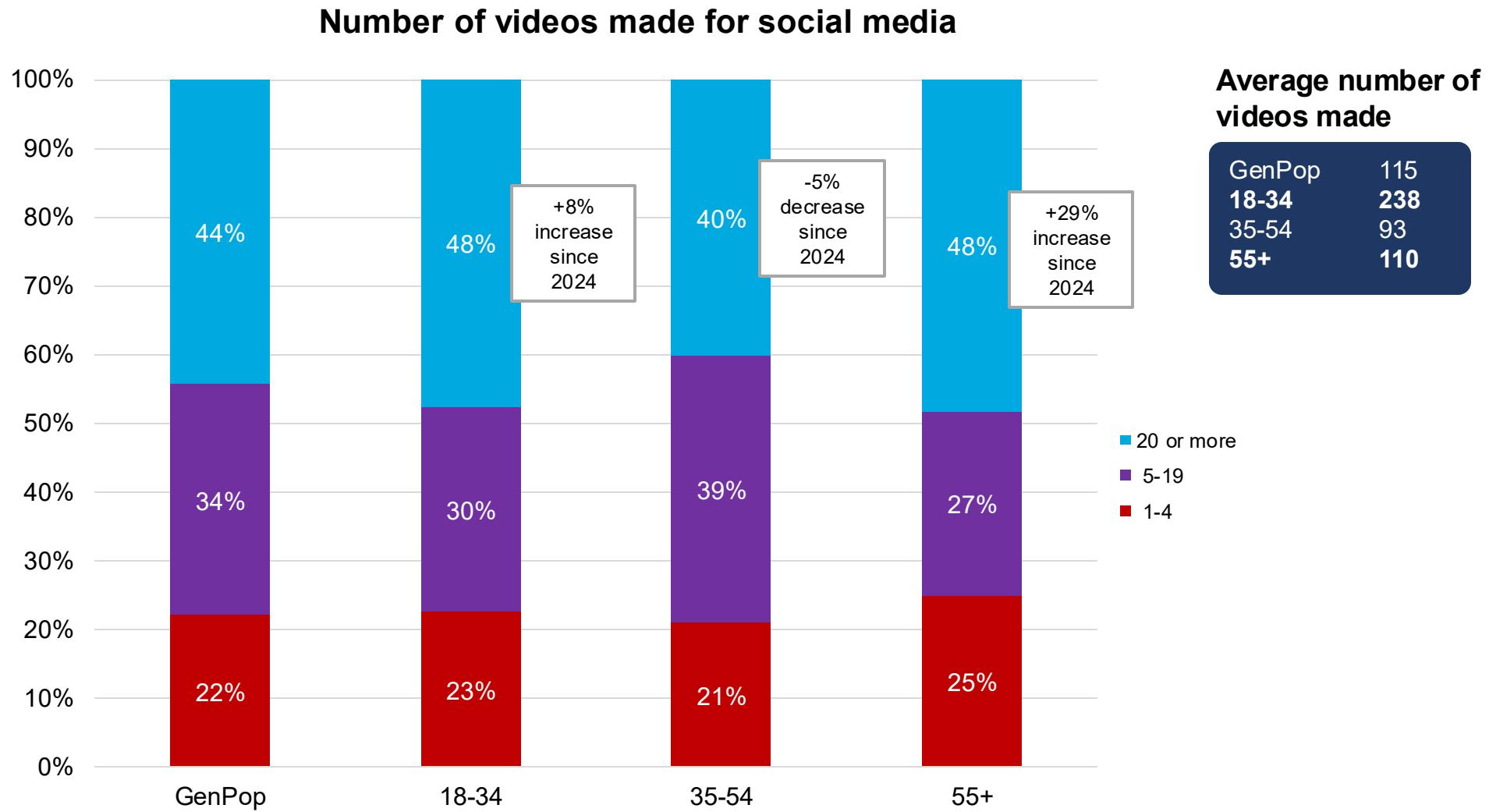
20



q53: How many followers/subscribers across all social media do you have? (Among those who create video content for the Internet)
N=583

44% of Americans say they have made 20 or more videos for social media. The population of those making 20 more videos continues to grow driven by those ages 18 to 34 and primarily those 55+ who are now making more videos.

21

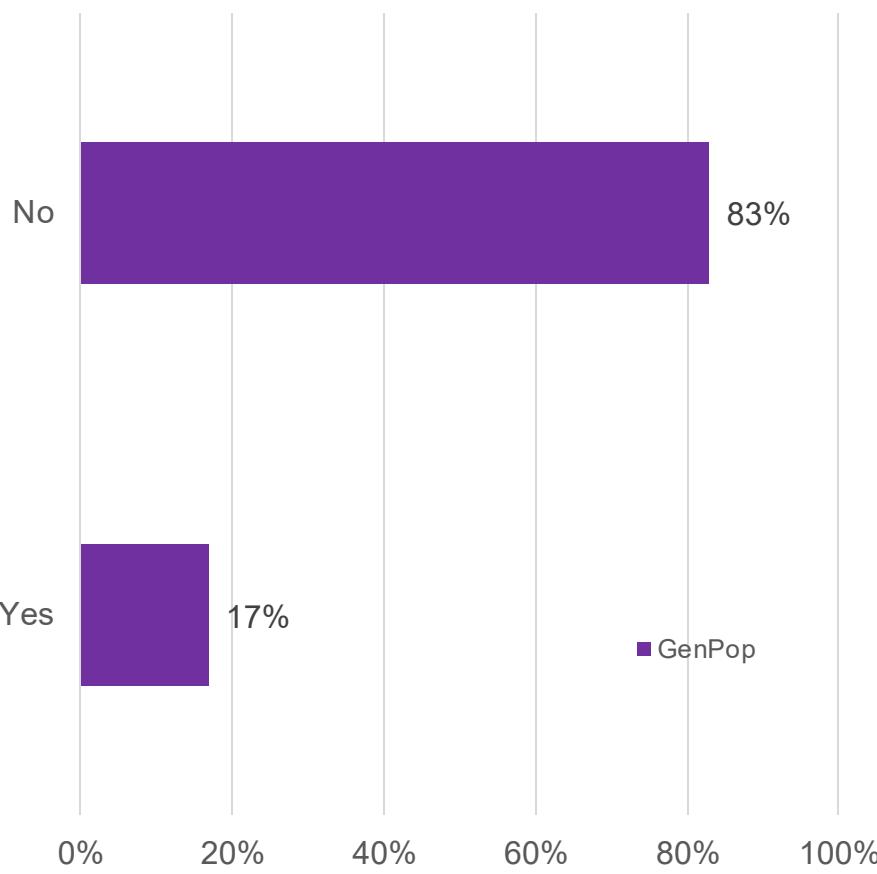


q54: Approximately how many Internet videos have you made? (Among those who have made videos for the Internet. N=583)

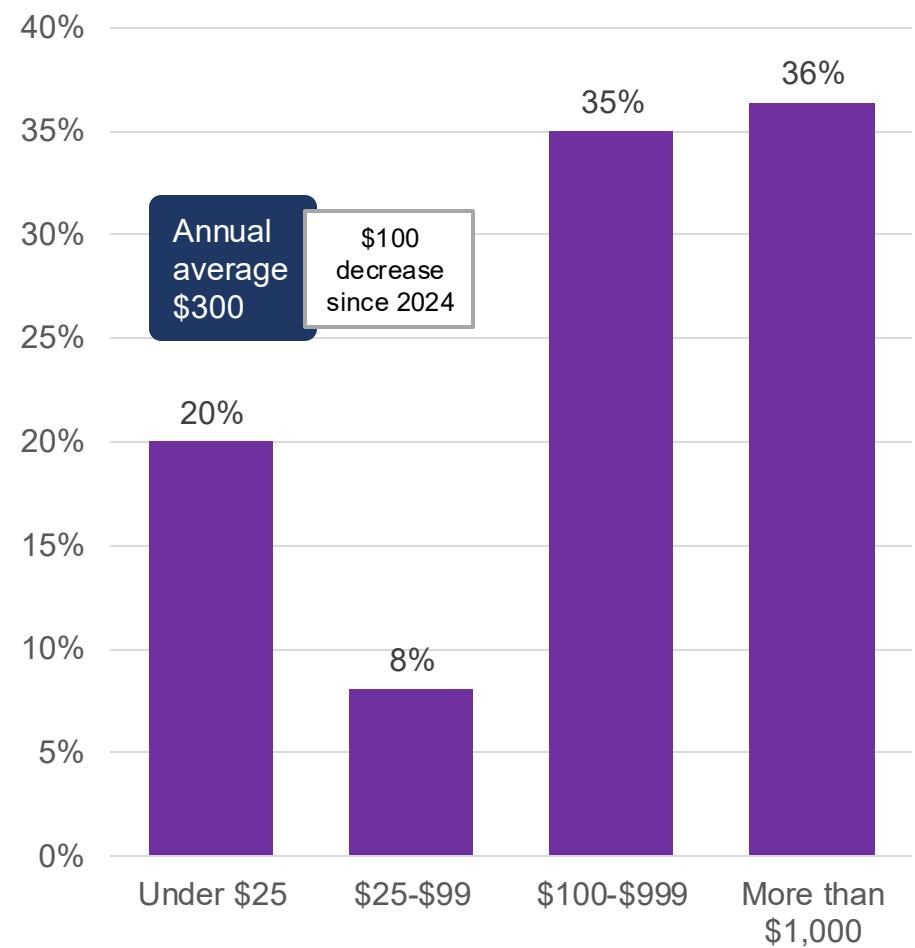
Just 17% of those who make videos make money with them. Average earnings are down 25% since 2024.

22

Have you made money with videos in the past 12 months?



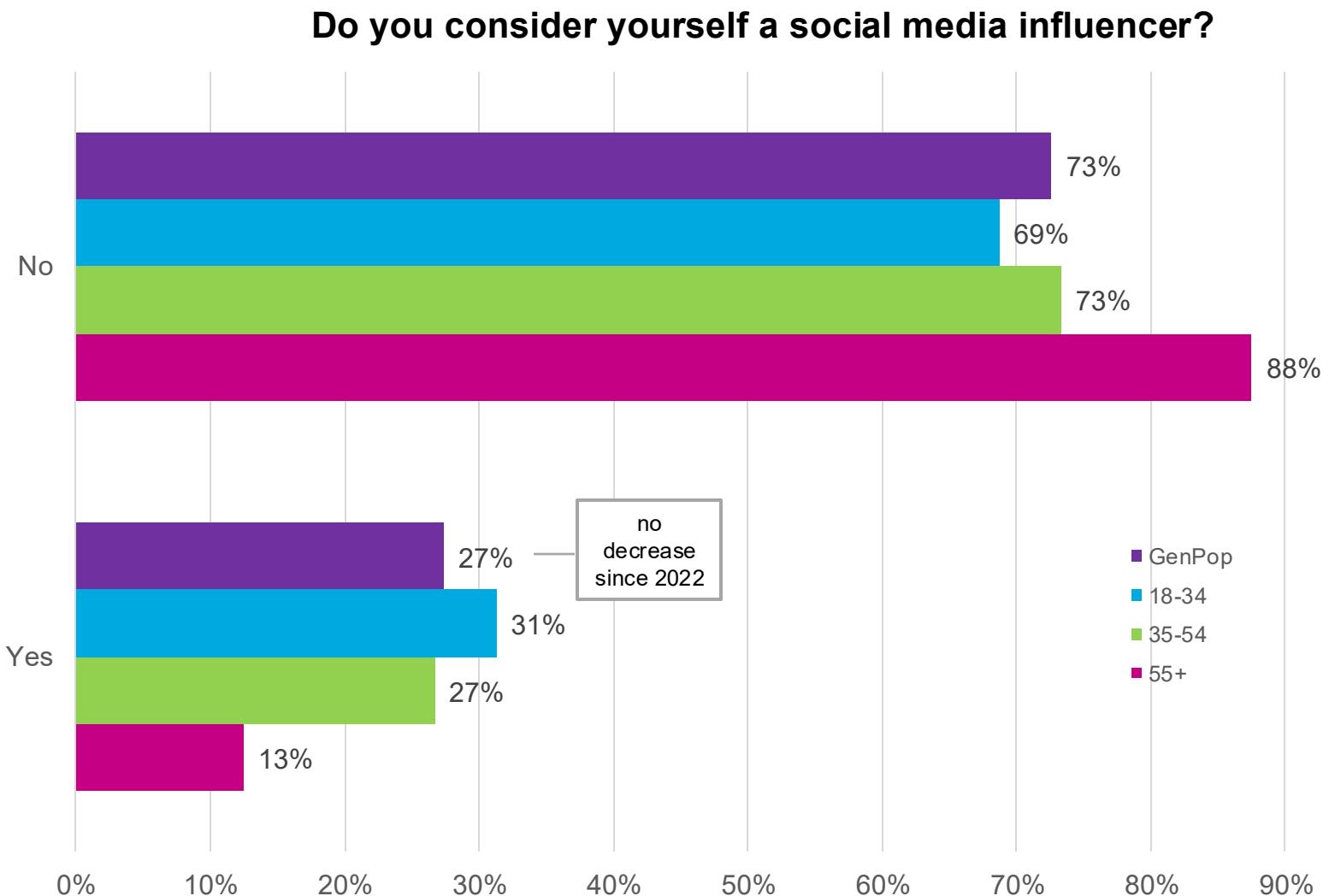
How much have you made?



q57: Have you made any money creating Internet videos in the past 12 months? (Among those who make videos for the Internet. N=583) o_q57: Approximately how much money have you made creating Internet videos in the past 12 months? (Among those making money N=99)

27% of those in the U.S. who create video for the Internet consider themselves “social media influencers,” driven by those under 35.

23

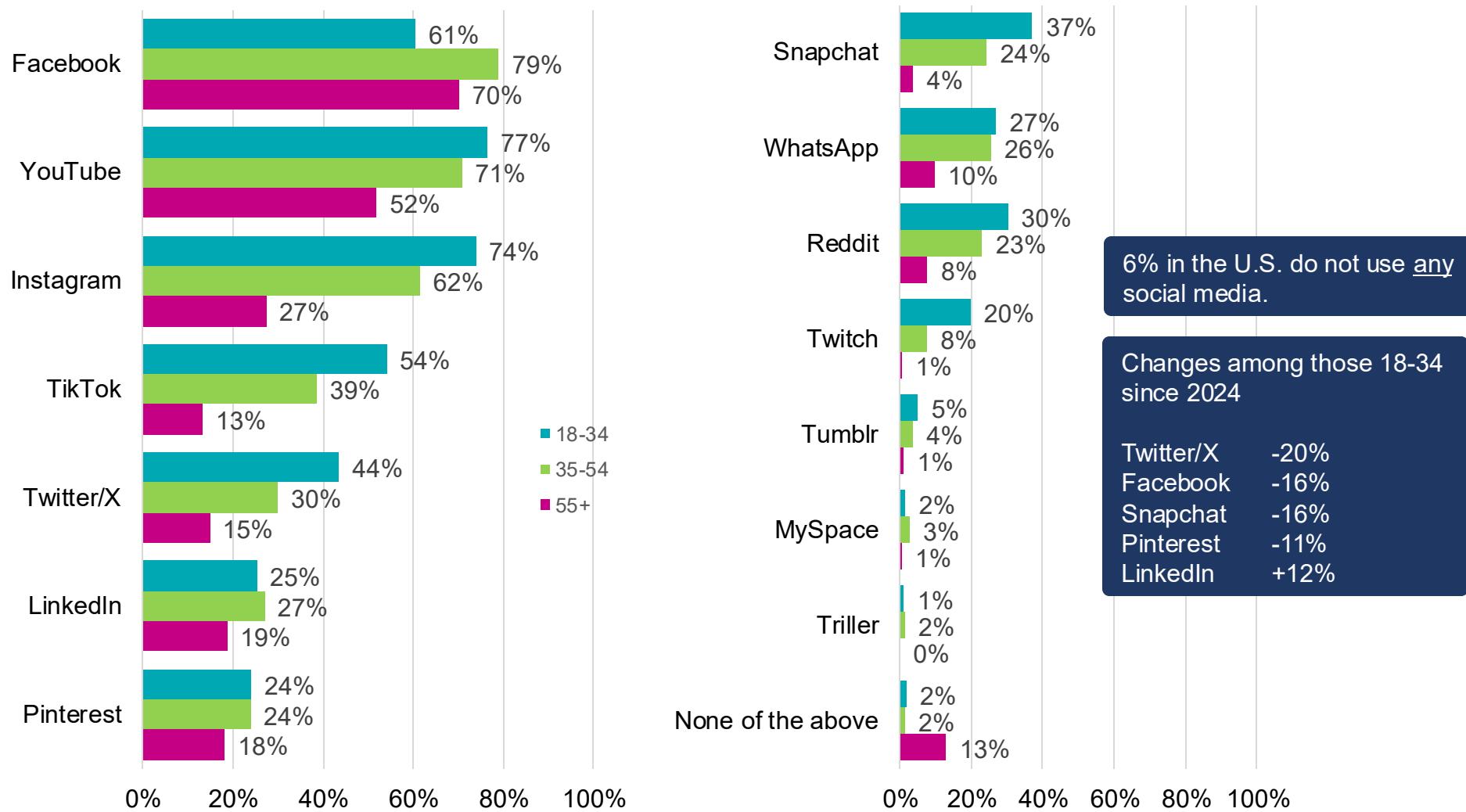


q58: Do you consider yourself a “social media influencer?” (Among those who make videos for the Internet. N=583)

Facebook, YouTube, and Instagram remain the most popular social platforms. Those 18 to 34 are 20% less likely to use X. Facebook, Snapchat and Pinterest are down compared to 2024, while TikTok is stable year over year.

24

Social media platforms used at least once per week

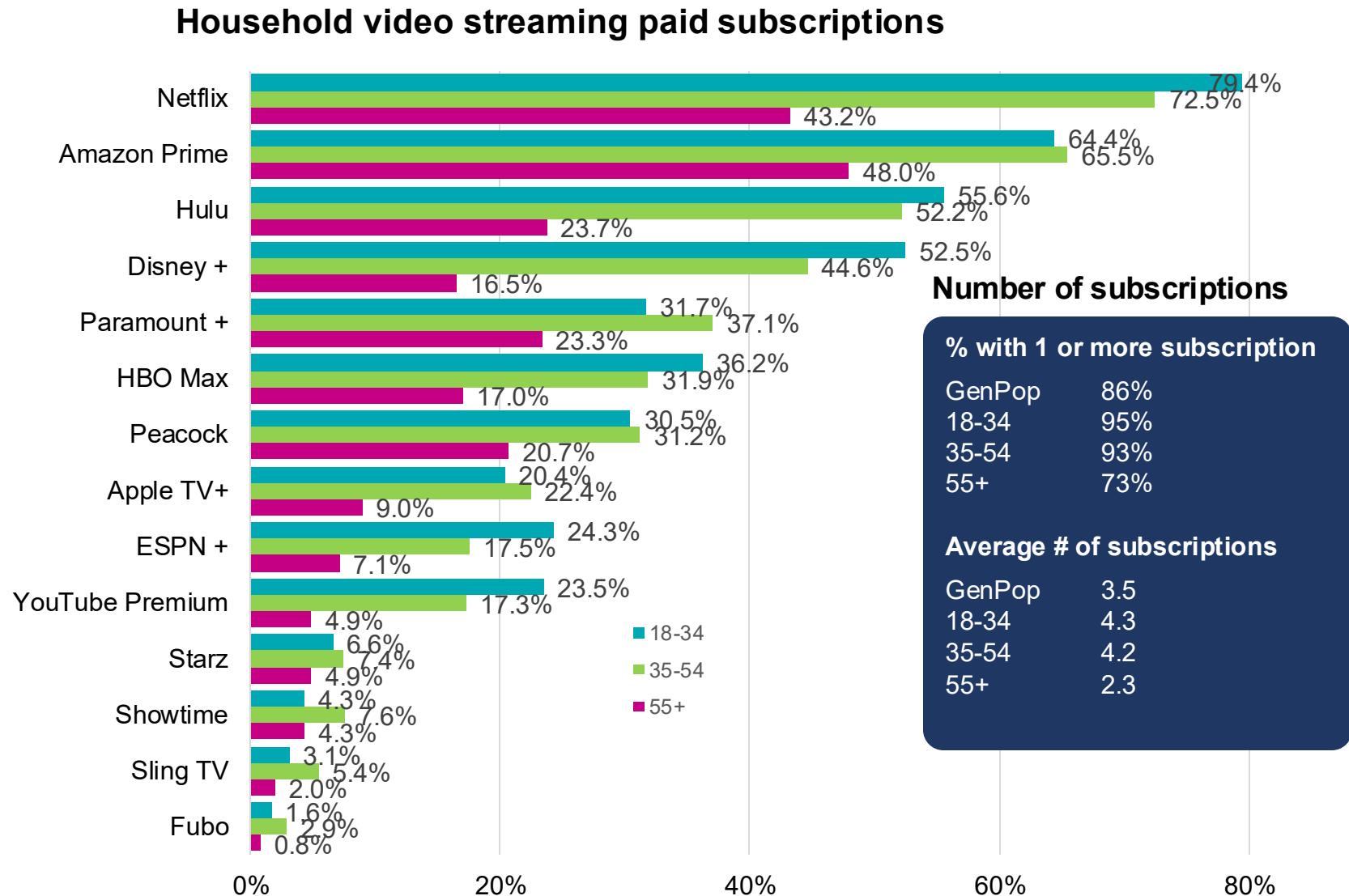


q61: Which of the following social media platforms do you currently use at least once per week? (Among those who have used at least one platform; N=2,000; multiple response)

SVOD & OTT Viewing

American households have on average 3 SVOD services, with those under 55 having an average of 4 services and those 55+ having 2 on average. 1 or more subscription is up 5% since 2024.

26

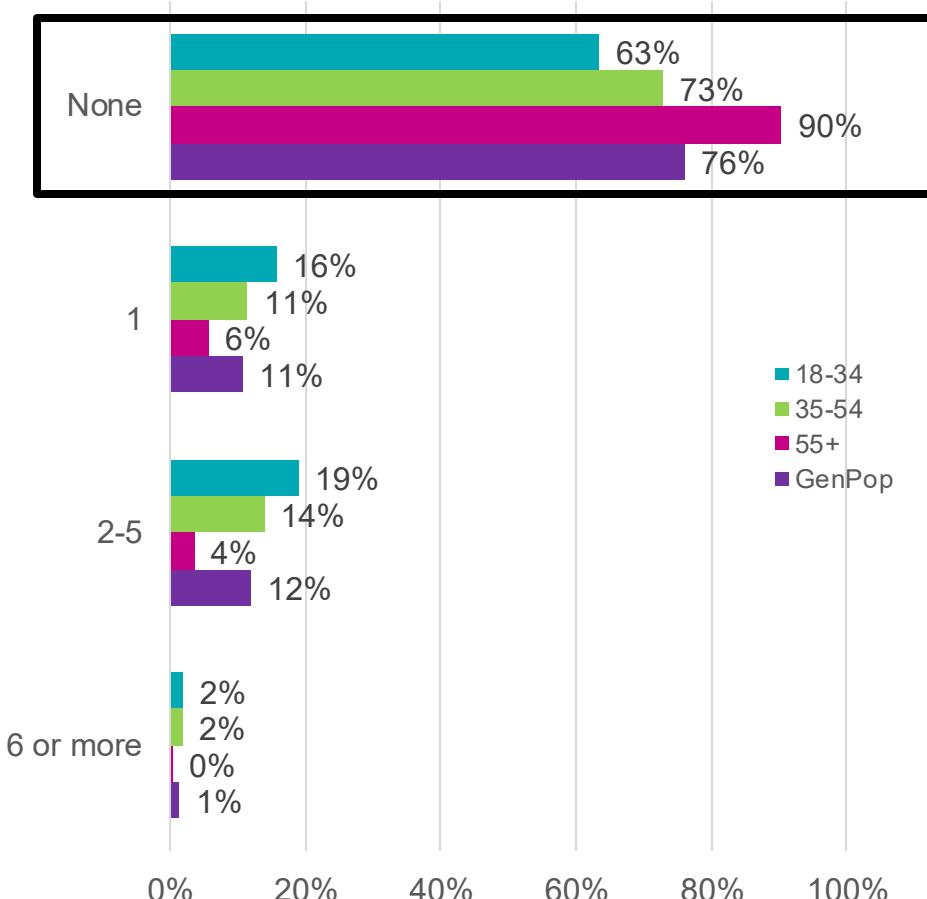


q65: Do you, or does anyone in your household, pay to subscribe to any of the following? N=2000; multiple response)

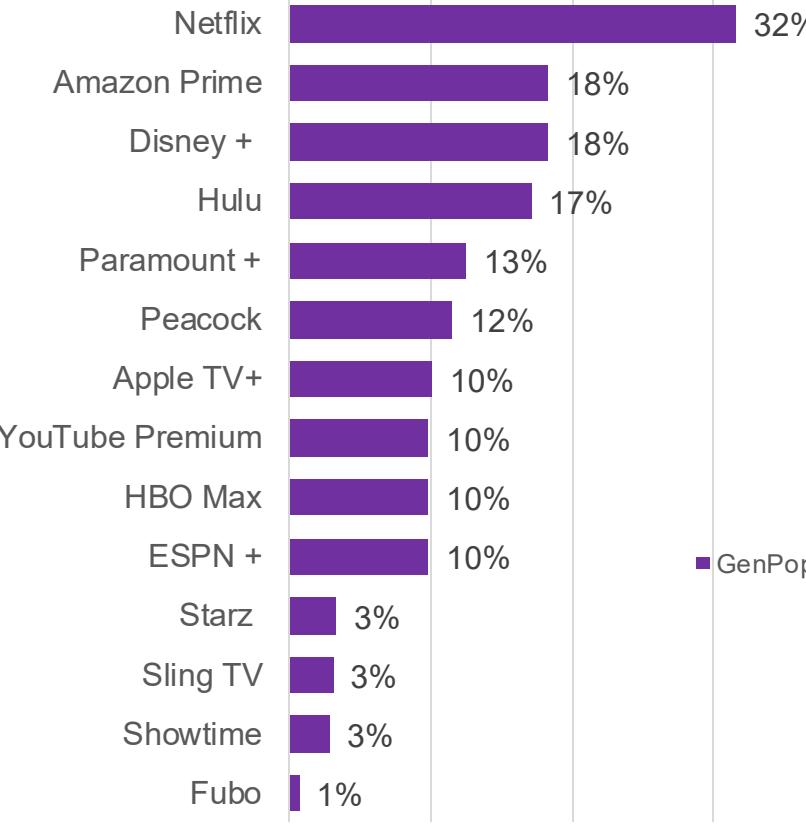
76% of Americans have not cancelled any of their SVOD services in the last 3 months no change since 2024. Netflix and Amazon Prime are the most likely to be canceled.

27

Number of services cancelled in the last 3 months



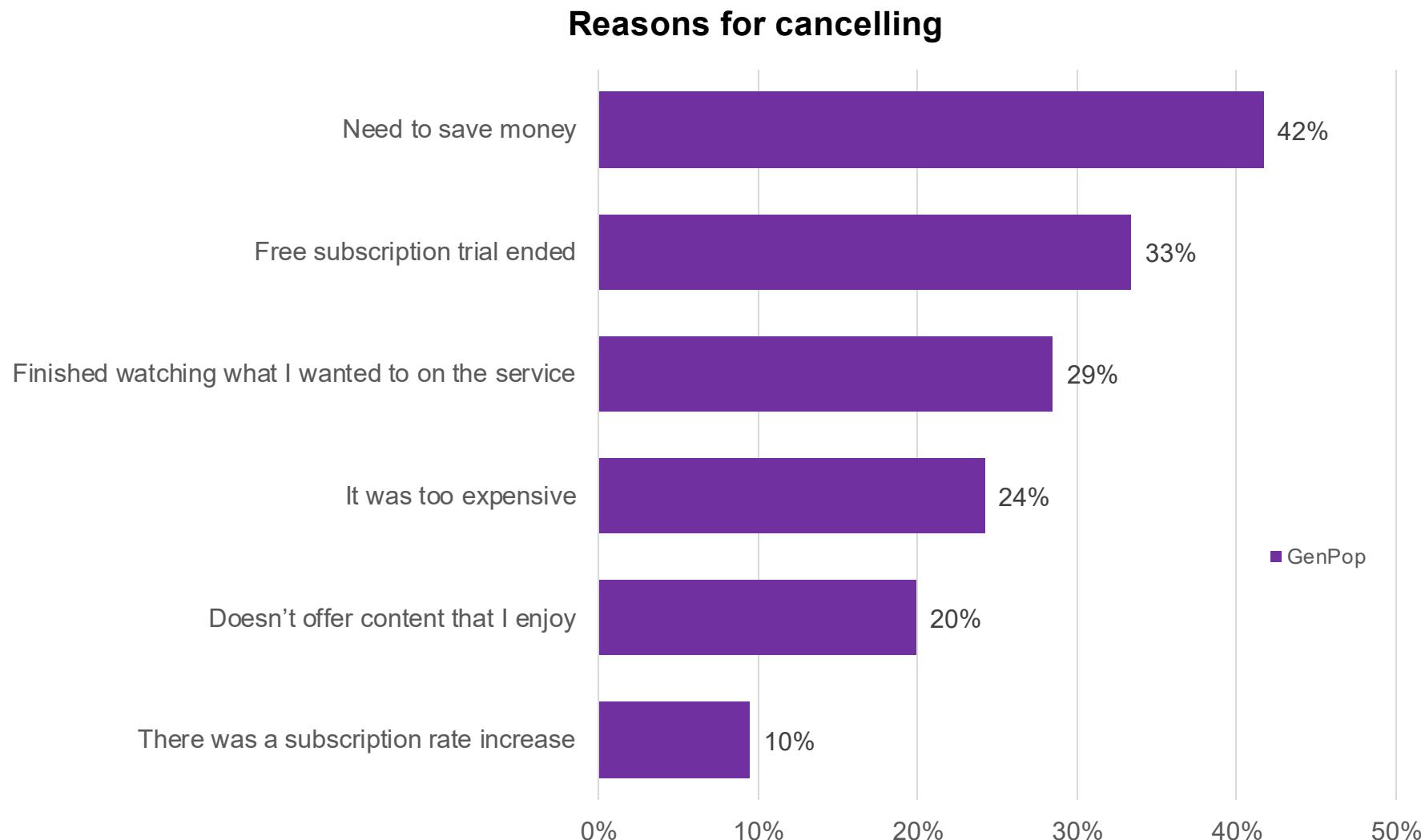
Services cancelled



q65aaa: How many of those services you that you subscribed to did you cancel in the last 3 months? (Among those who subscribe to at least 1 service N=1,727) q65aac: Which of those services you that you subscribed to did you cancel in the last 3 months? (Among those who have canceled services in the last 3 months; N=415; multiple response)

The need to save money is the most frequently given reason for cancelling subscriptions. 33% cancel after the free trial has ended.

28

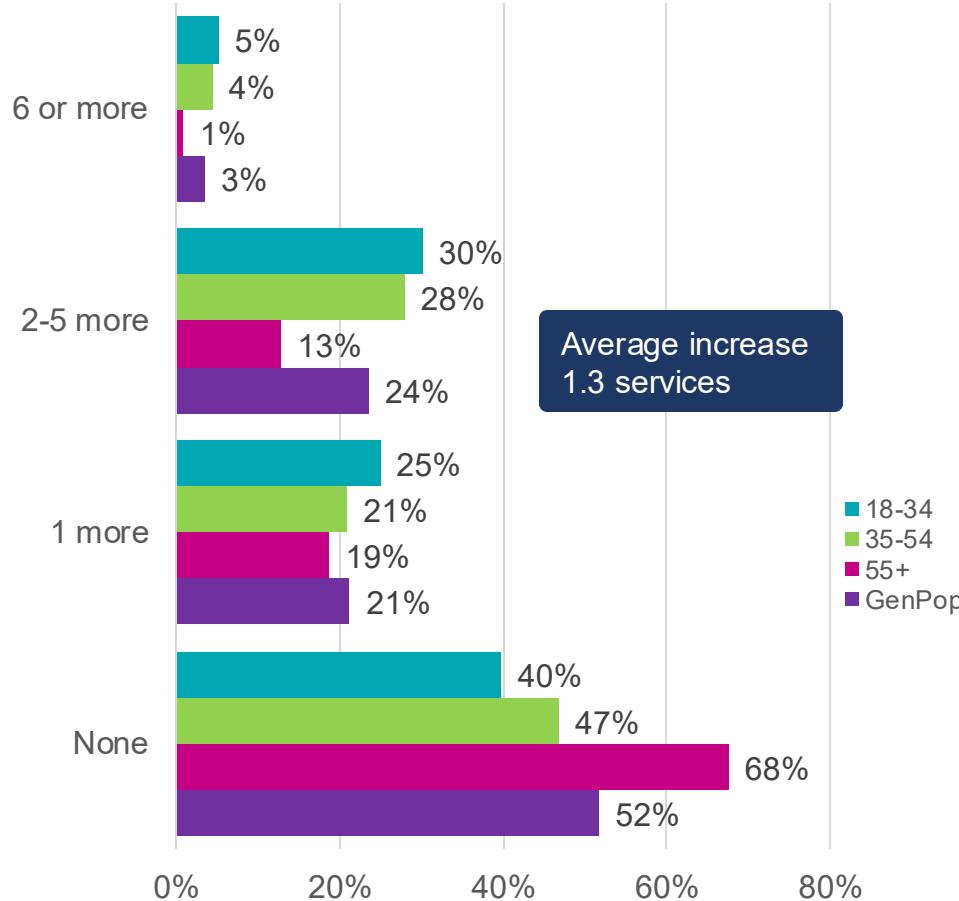


q65aab: Which of the following best describes the reasons you cancelled those subscriptions? (Among those who have canceled services in the last 3 months. N=326; multiple response)

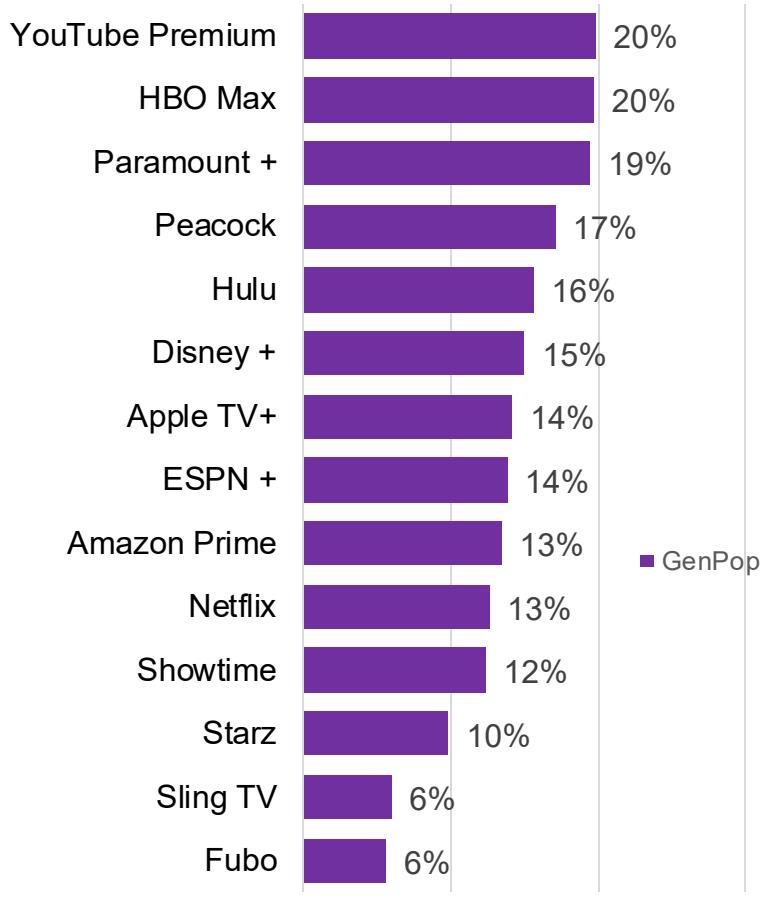
On average Americans will increase the number of paid video on demand services by 1.3 in 2025.
Top choices for additional service remain the same year over year.

29

Anticipated increase in subscriptions within next year



Top choices for additional services



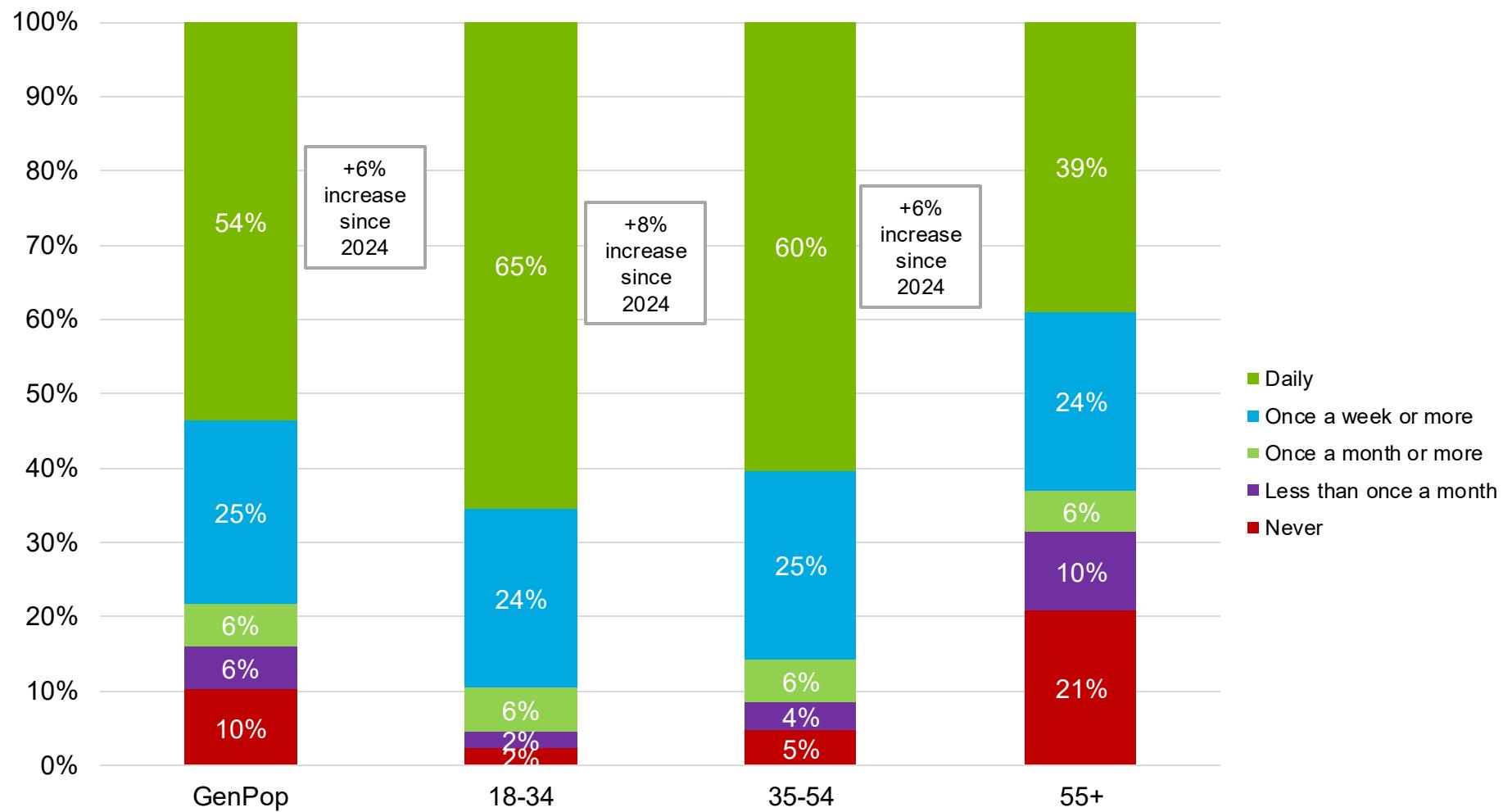
q65aa: How many more paid video on demand streaming services are you likely to subscribe to within the next year? (Among those who pay for 1 or more services N=1,640) q67b: Please pick your top two choices for additional paid streaming movie and TV services? (Among those who would be willing to add at least once service N=832; Up to 2 responses permitted)

Digital Video

More than half of Americans watch videos daily. Daily video viewing has increased by 6% nationally since 2024 driven by those under 55.

31

Frequency of viewing digital video from the Internet

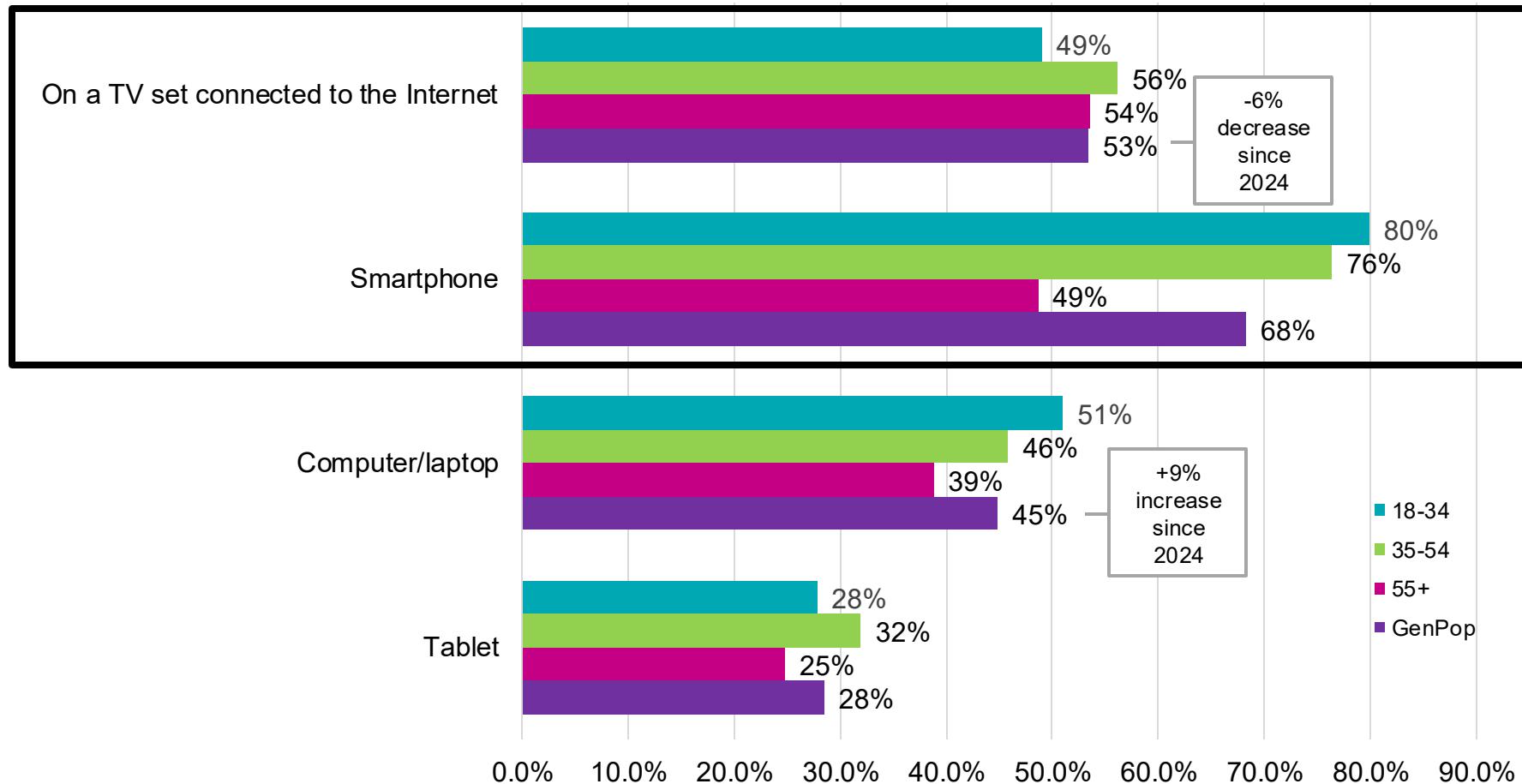


q69: About how often would you say you watch digital video on a computer, laptop, smartphone, tablet, or TV connected to the Internet? (N=1,914; Those who said "not sure" n=86)

Those under the age of 55 watch the majority of their online video content through their phone. Those 55+ are most likely to watch online video content through a connected TV. Smartphone use to access video is up 7% compared to 2022.

32

Devices used at least once a week to access online video content

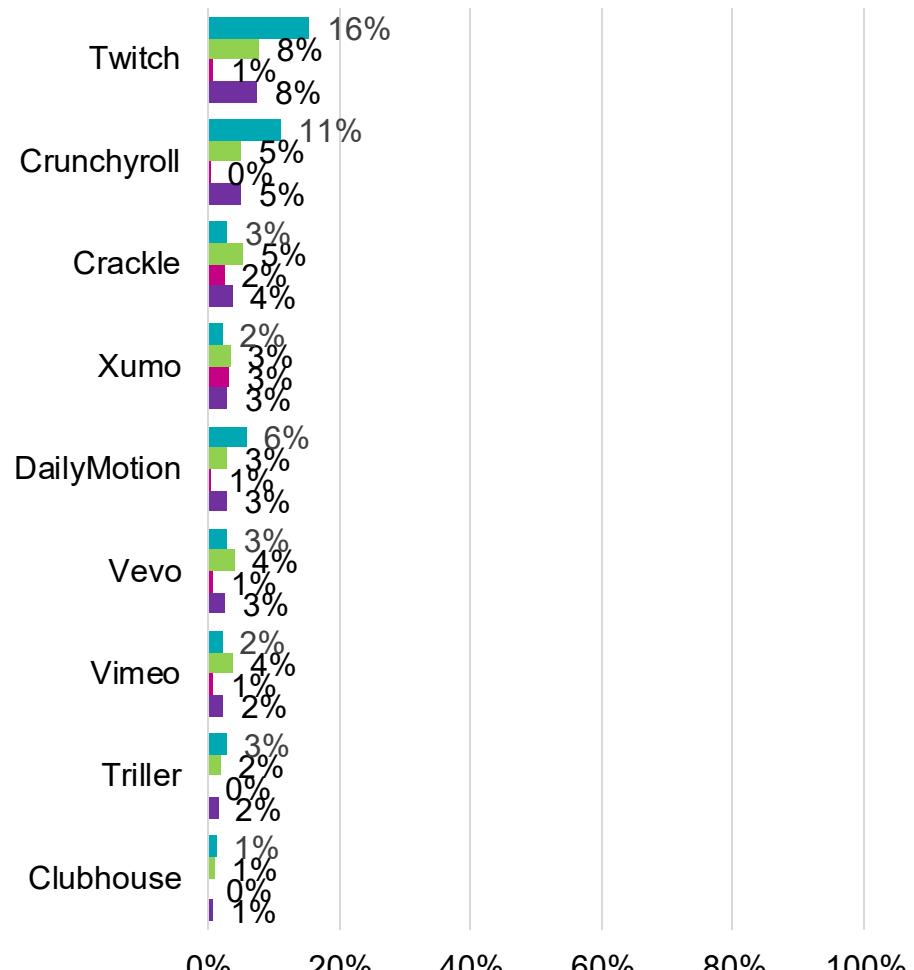
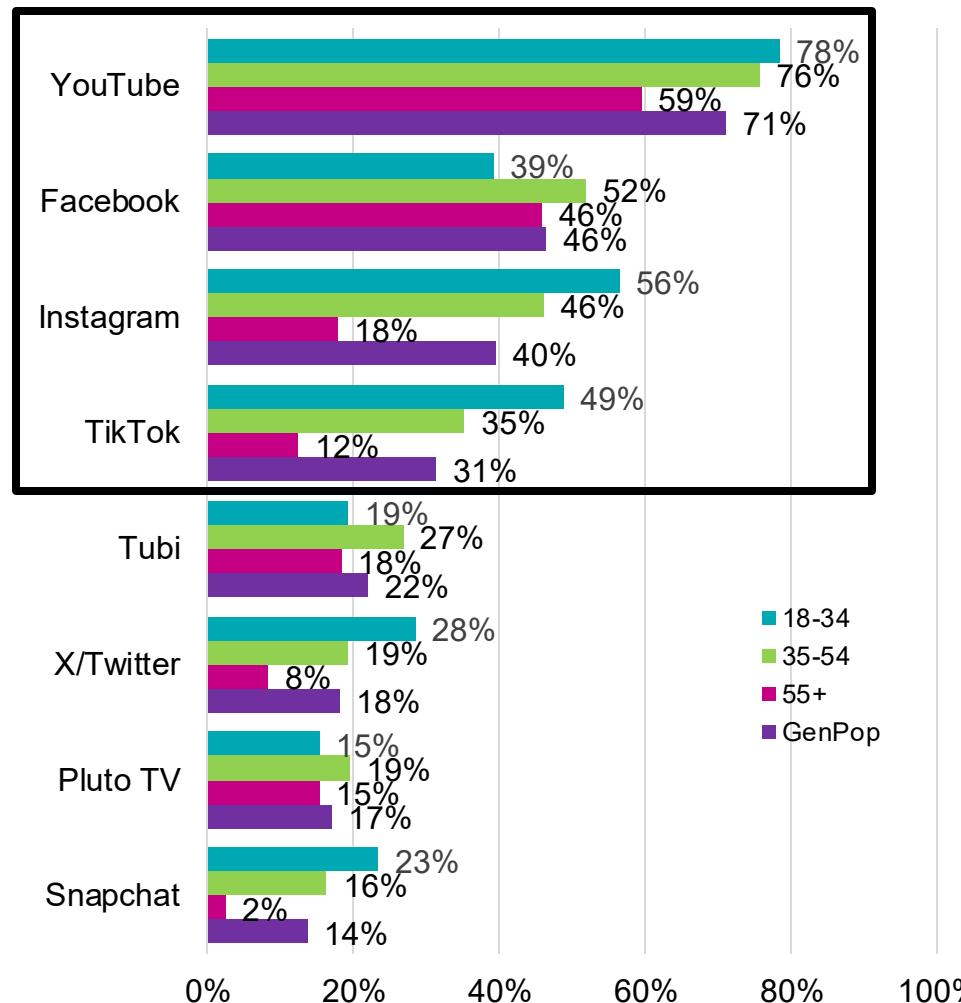


q71: Which devices do you regularly use (at least once a week) to watch online video content? (Among those who watch digital video; N=1,714; multiple response)

YouTube and social media are the primary free services used by Americans to watch online video. Tubi use has increased 7% since 2024.

33

Free services used to watch online video



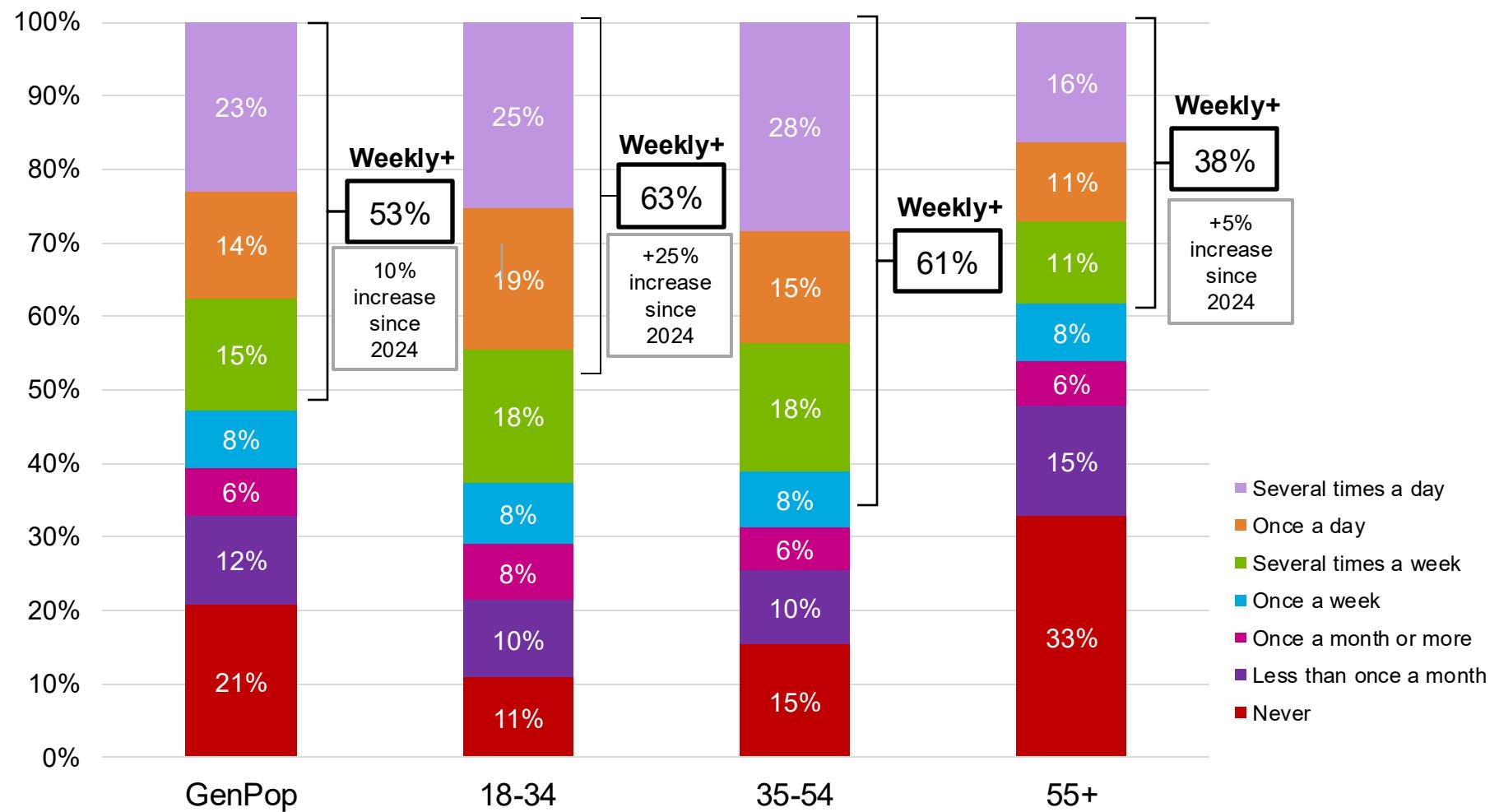
q72: Which of the following free services do you currently use to watch online video regularly (at least once per week)? (Among those who watch digital video; N=1,719; multiple response)

Live Streaming Video

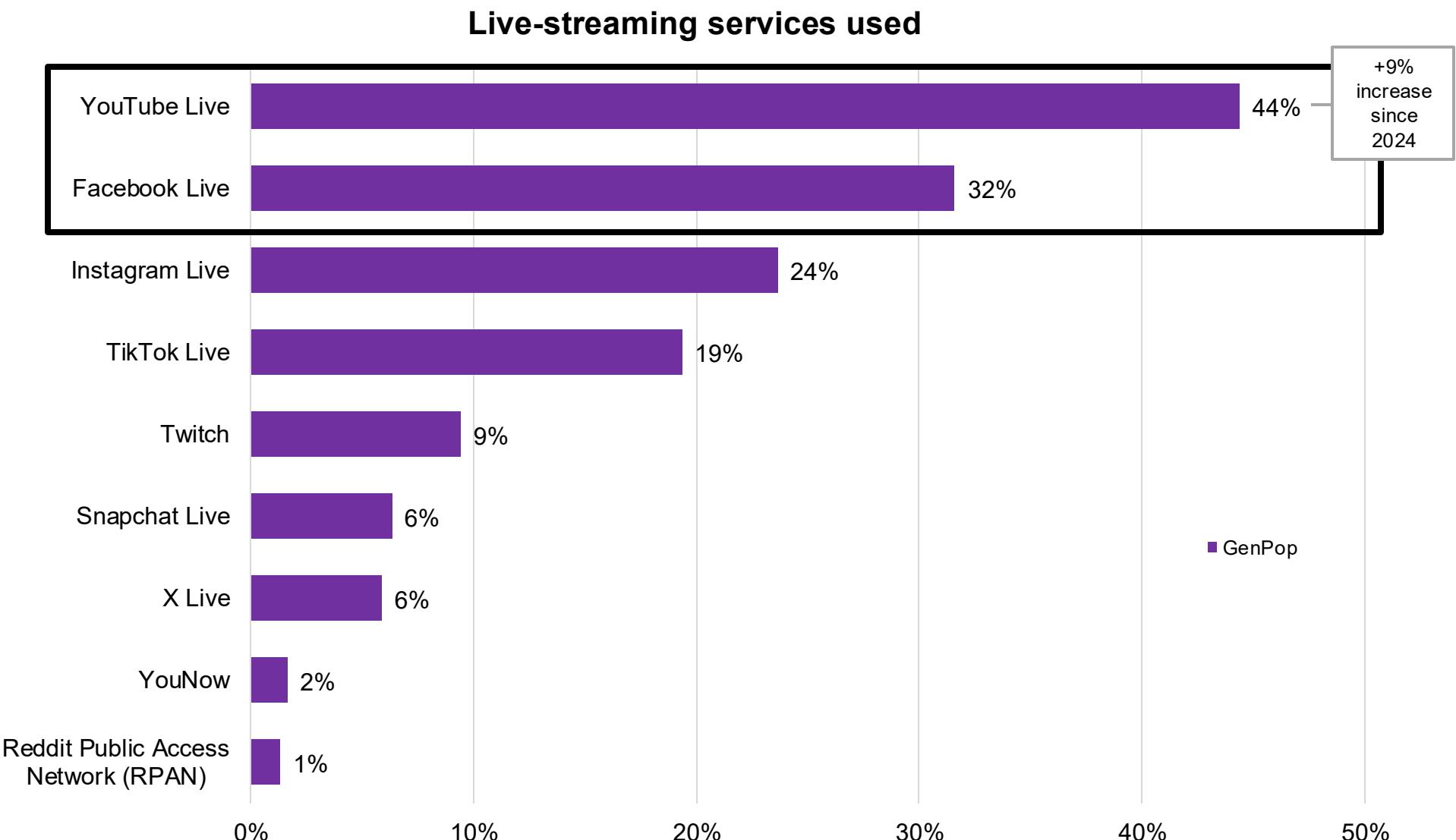
53% of Americans watch live streaming video weekly or more often. A 10% increase from 2024.

35

Frequency of viewing live-stream video



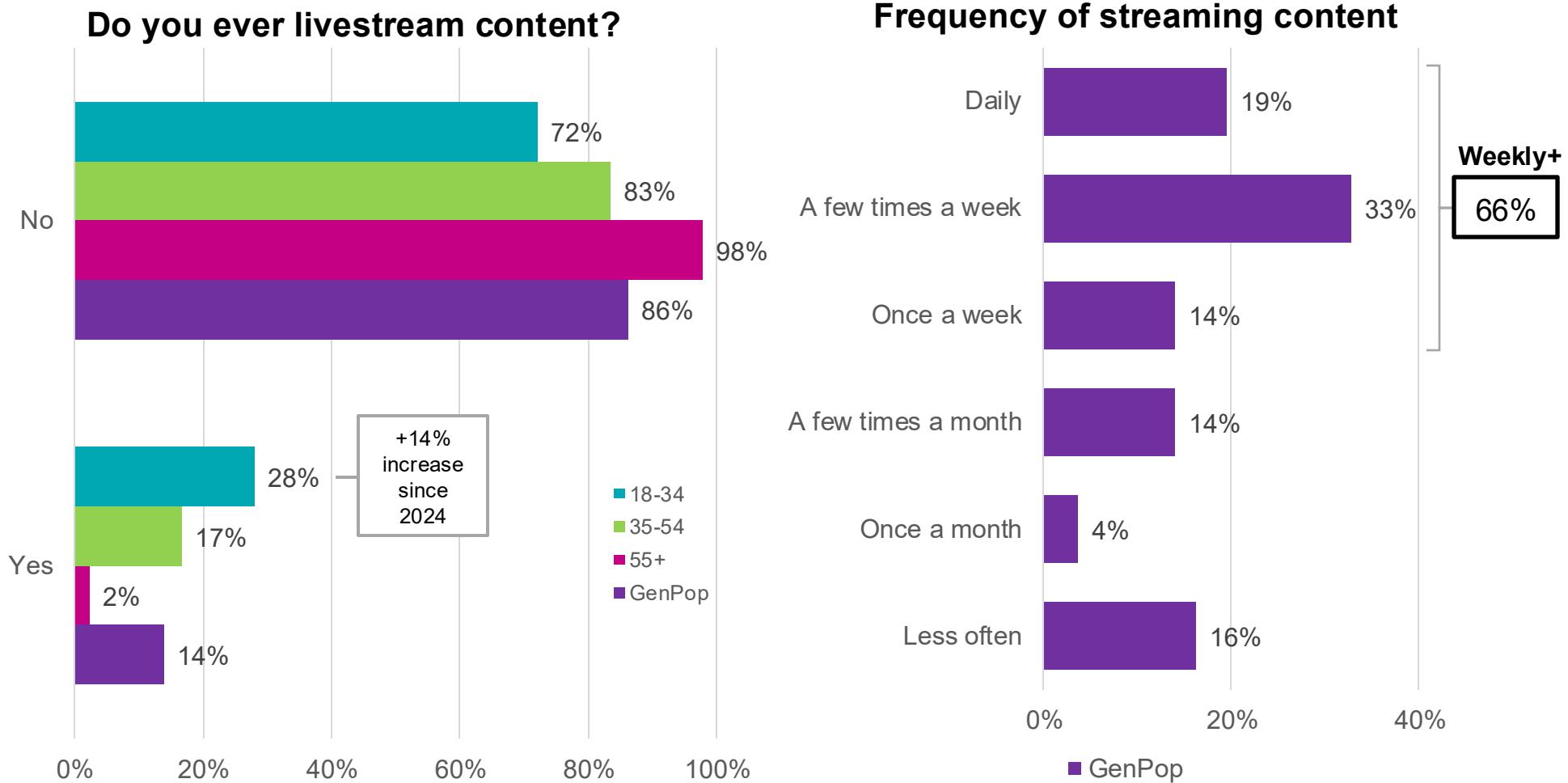
q78: How frequently do you watch LIVE streaming video? (N=2,000)



q79: Which of the following do you ever use to watch LIVE streaming video? (Among those who watch live-stream video once a month or more; N=1,582; multiple response)

14% of the general population livestream content driven by those 18 to 34. Among those who livestream, Two thirds do so weekly or more often.

37

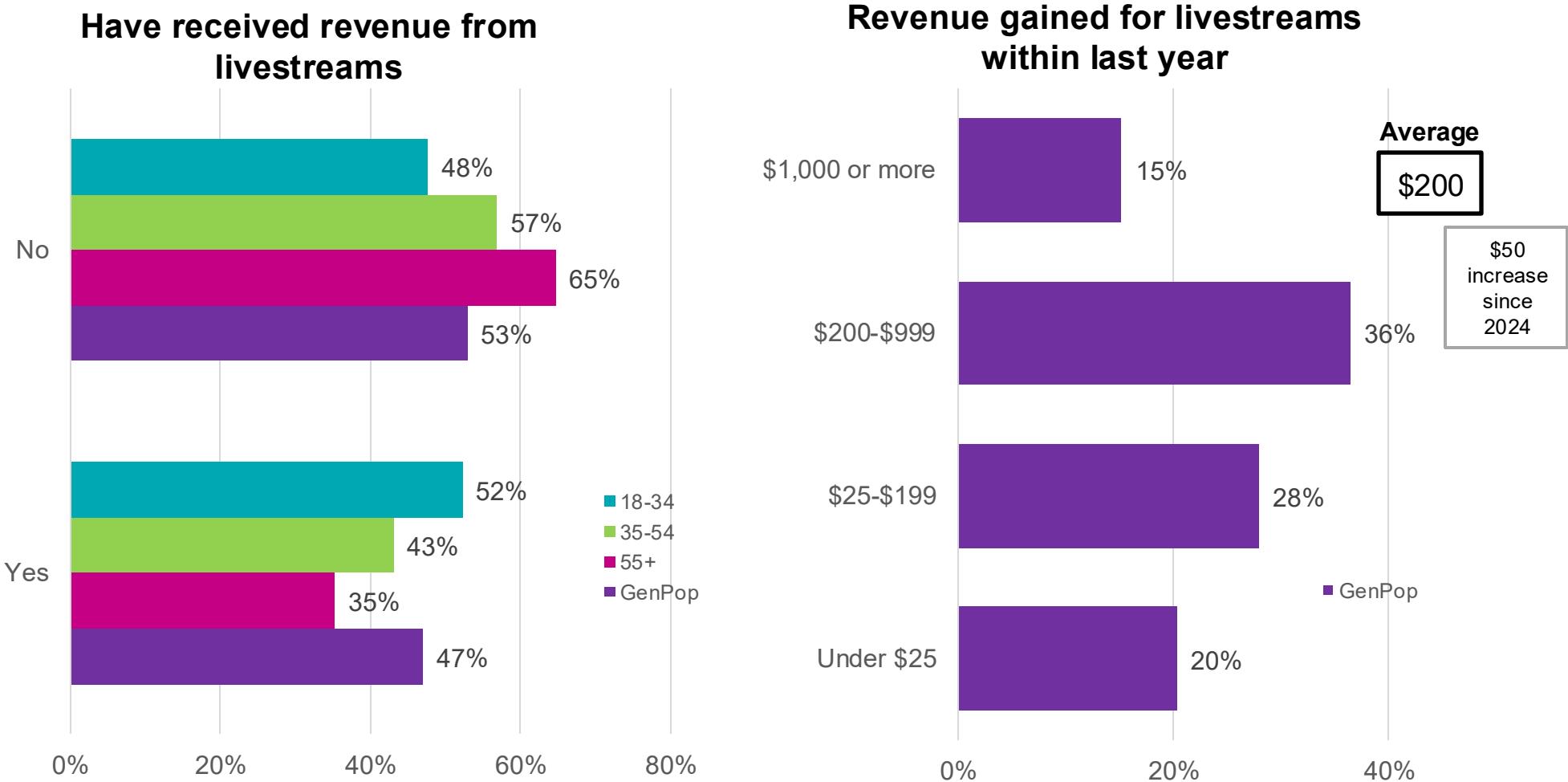


q81a: Do you, yourself, ever livestream content yourself, to other people? (N=1,961; Those who said "not sure" n=39)

q81b: How frequently do you livestream your own content? (Among those who livestream content; N=272)

47% of those who livestream content report receiving revenue from those broadcasts.
The average revenue gained is up \$50 since 2024.

38

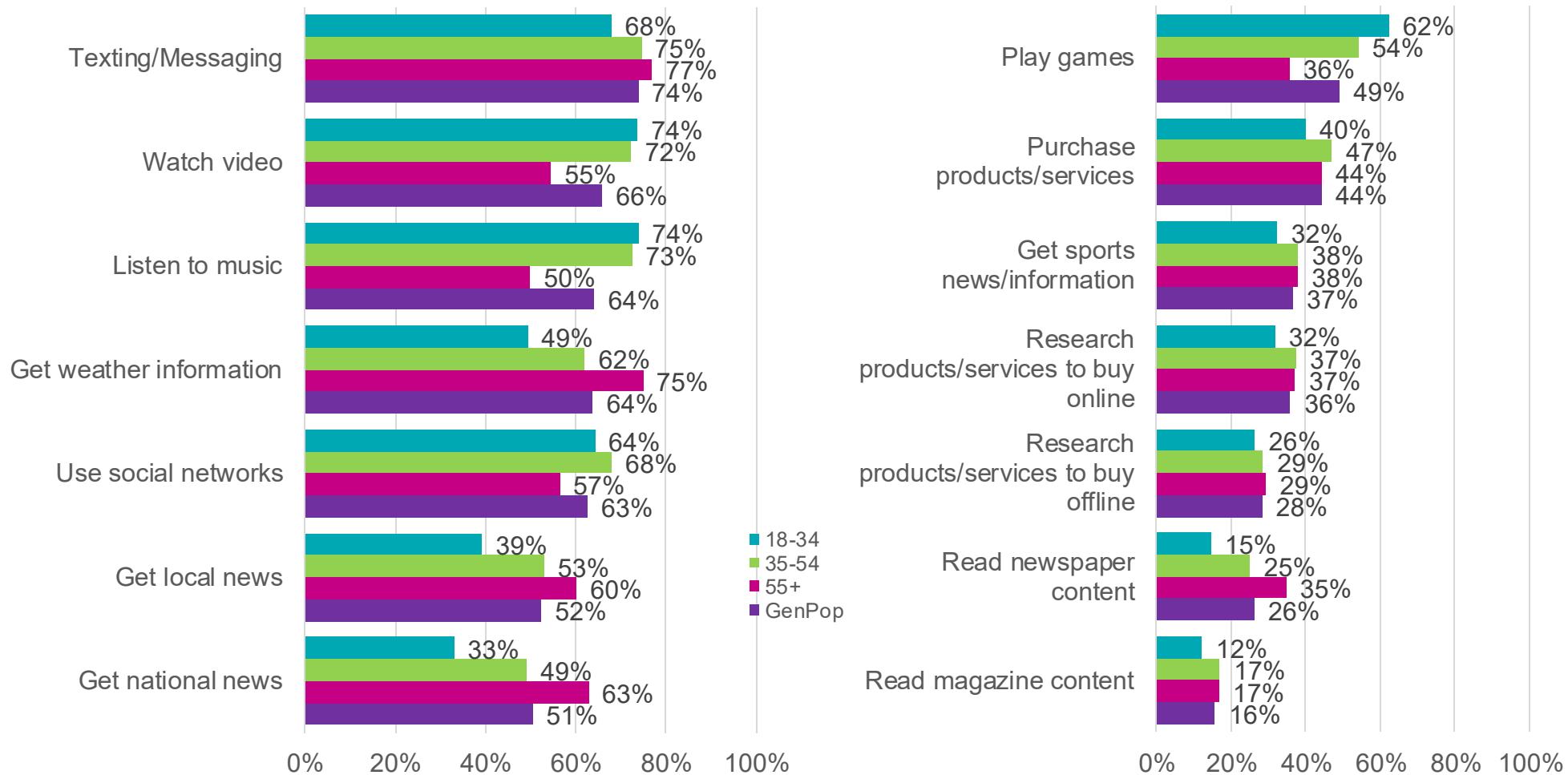


q81c: Have you charged fees for your livestreams or received tips, advertising money or other revenue from your livestreams?
(Among those who livestream content; N=272) q81d: Approximately, how much money have you made from your livestreams within the past year? (Among those who have received revenue from livestreams N=110; Those who said "Not sure" n=10)

Texting or messaging is the most popular task for connected devices. Those 35+ are focused on news information, while those under 55 are more likely to use the technology for video, music, and games.

39

Regular tasks for connected devices

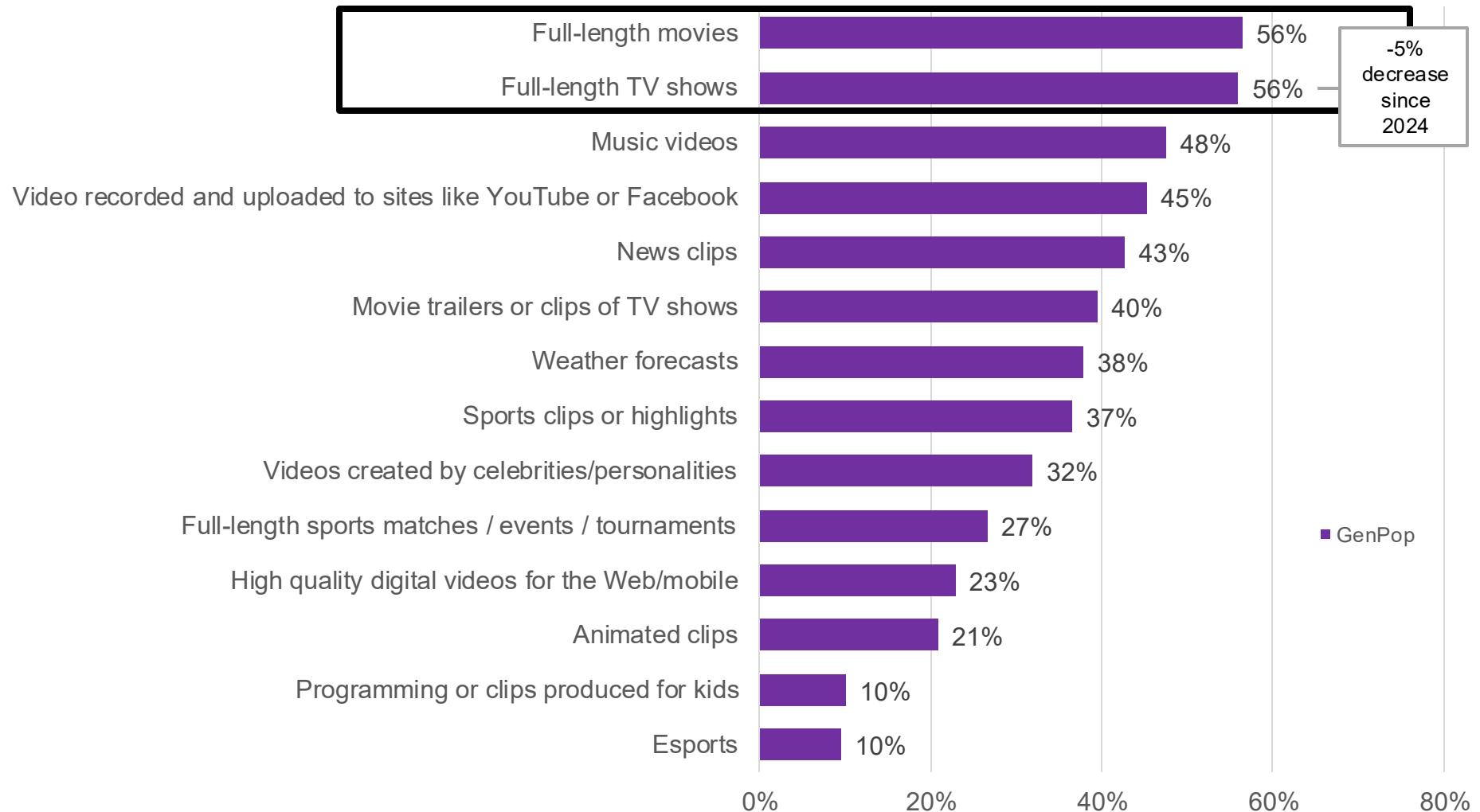


q82: Which of the following things do you do regularly (at least once per week) on your computer, laptop, smartphone, tablet, or connected TV? (Among those who own a PC or laptop; N=1,944; multiple response)

Movies or TV shows are the most popular videos to watch on connected devices. Full length TV shows are reported by 5% less of Americans since 2024.

40

Types of videos watched at least once per week on computer, laptop, smartphone, tablet, or connected TV



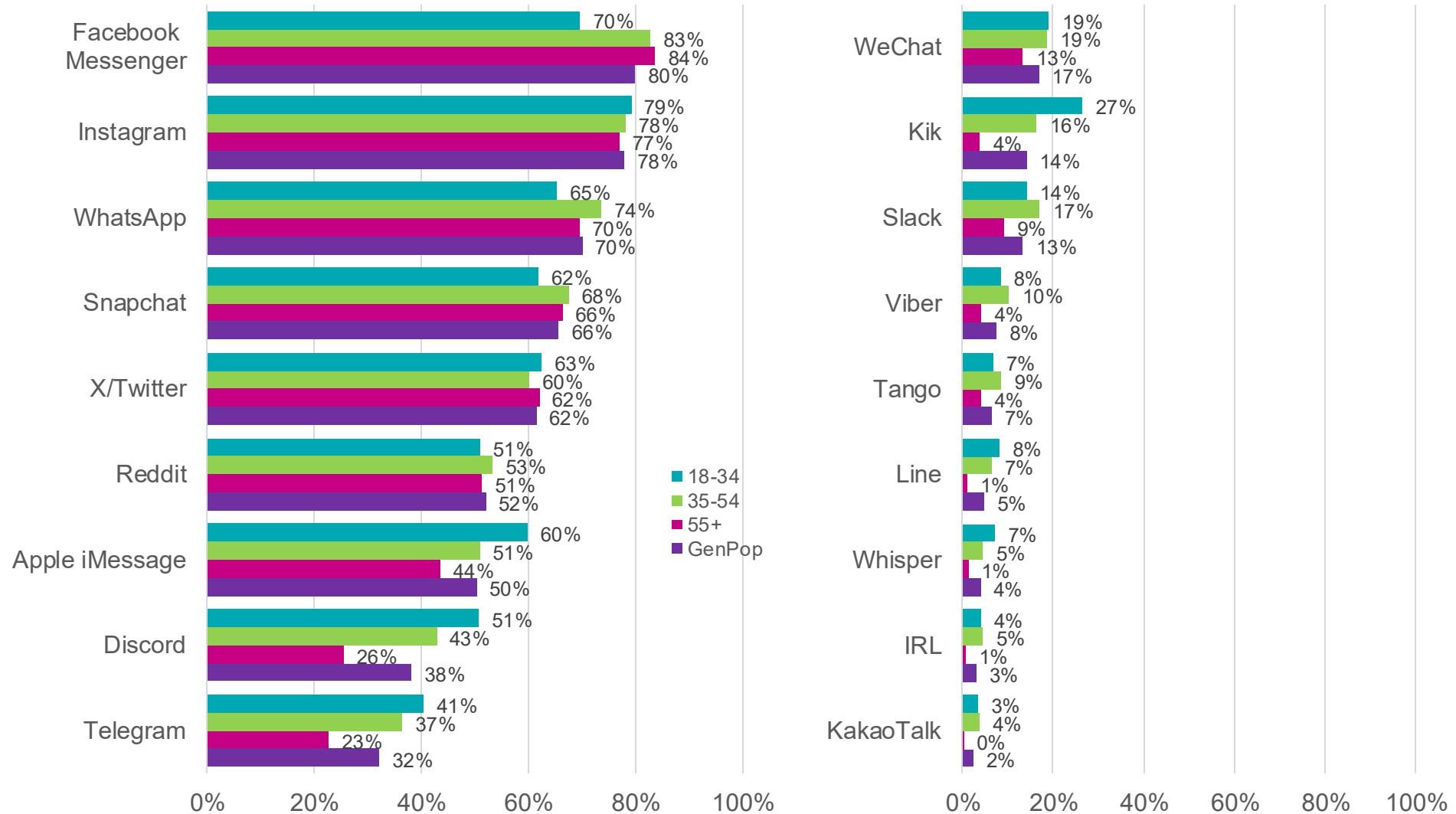
q83: Which of the following types of video do you watch regularly (at least once per week) on your computer, laptop, smartphone, tablet, or connected TV? (Among those who watch video at least once per week on their device; N=1,282; multiple response)

Messaging

Facebook Messenger and Instagram are the top messaging apps among all ages.
Snapchat saw a 7% decrease in use for messaging since 2024.

42

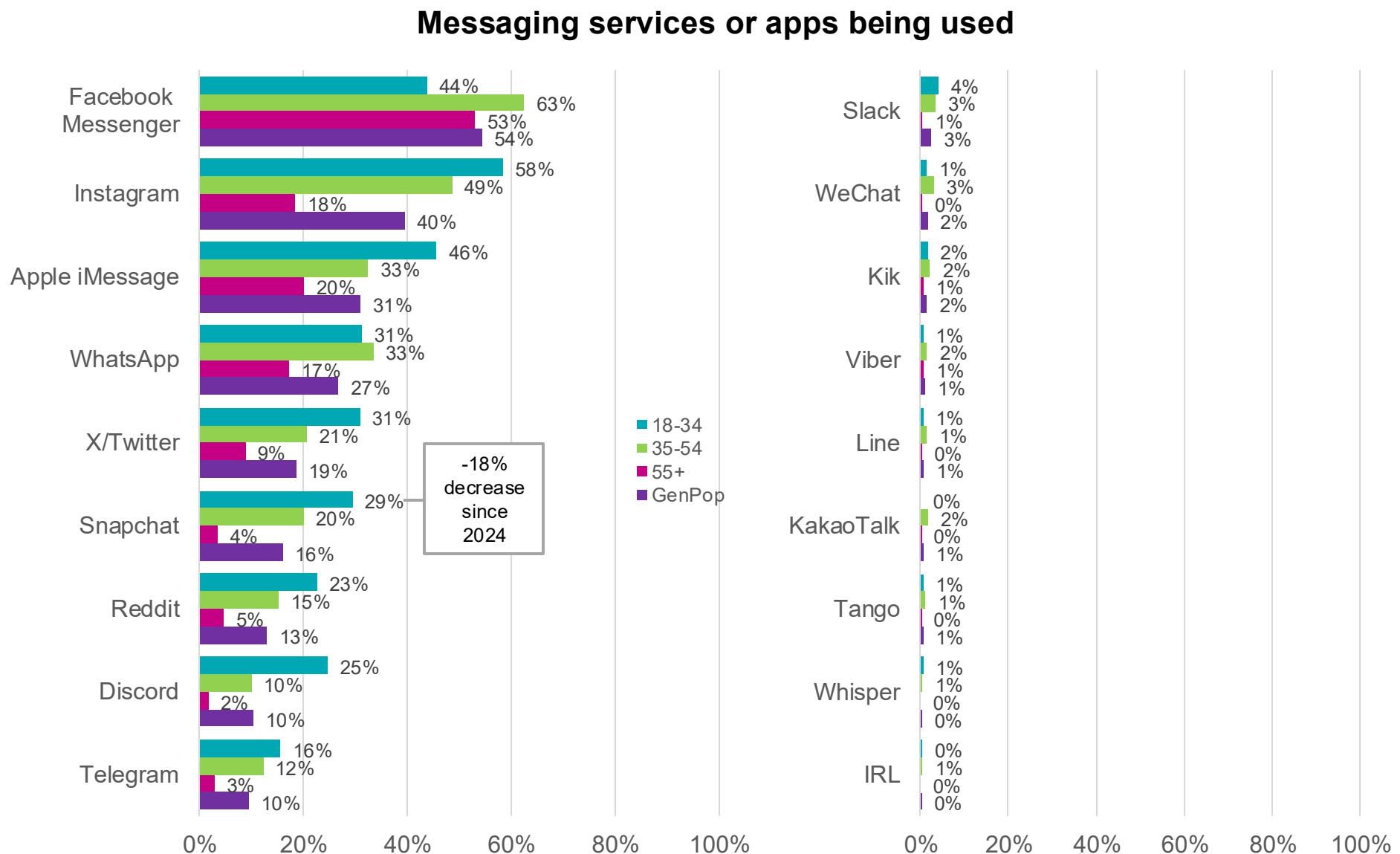
Messaging services or apps awareness



q107ab: Which of the following messaging services or apps have you heard of? (N=2,000; multiple response)

Facebook Messenger is the top messaging app among all ages. Snapchat is down 5% since 2024 driven by those 18 to 34.

43

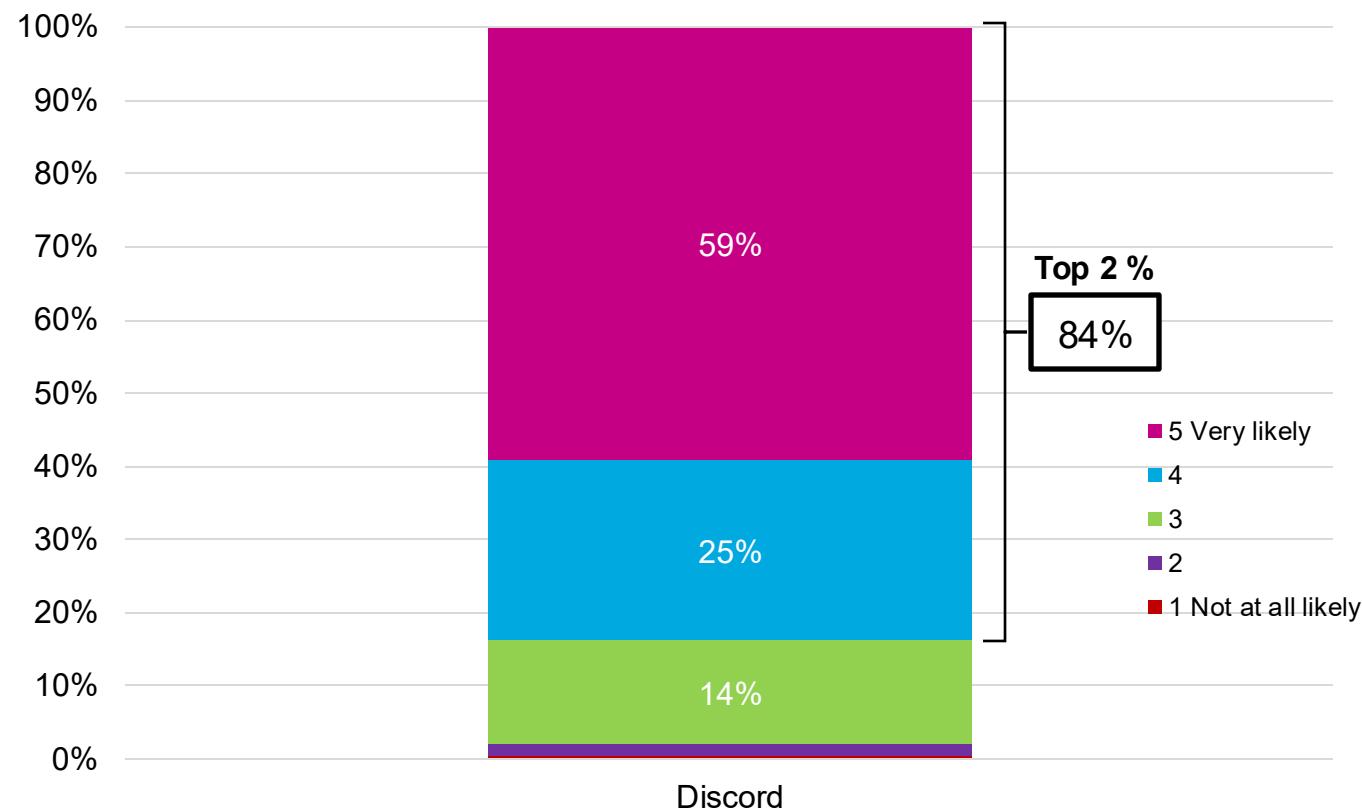


q107a: Which of the following messaging services or apps do you currently use? (N=2,000; multiple response)

84% of current users expect to still be using Discord in the next year. There are no significant demographic differences present.

44

Likelihood to use Discord within the next year – Among current users

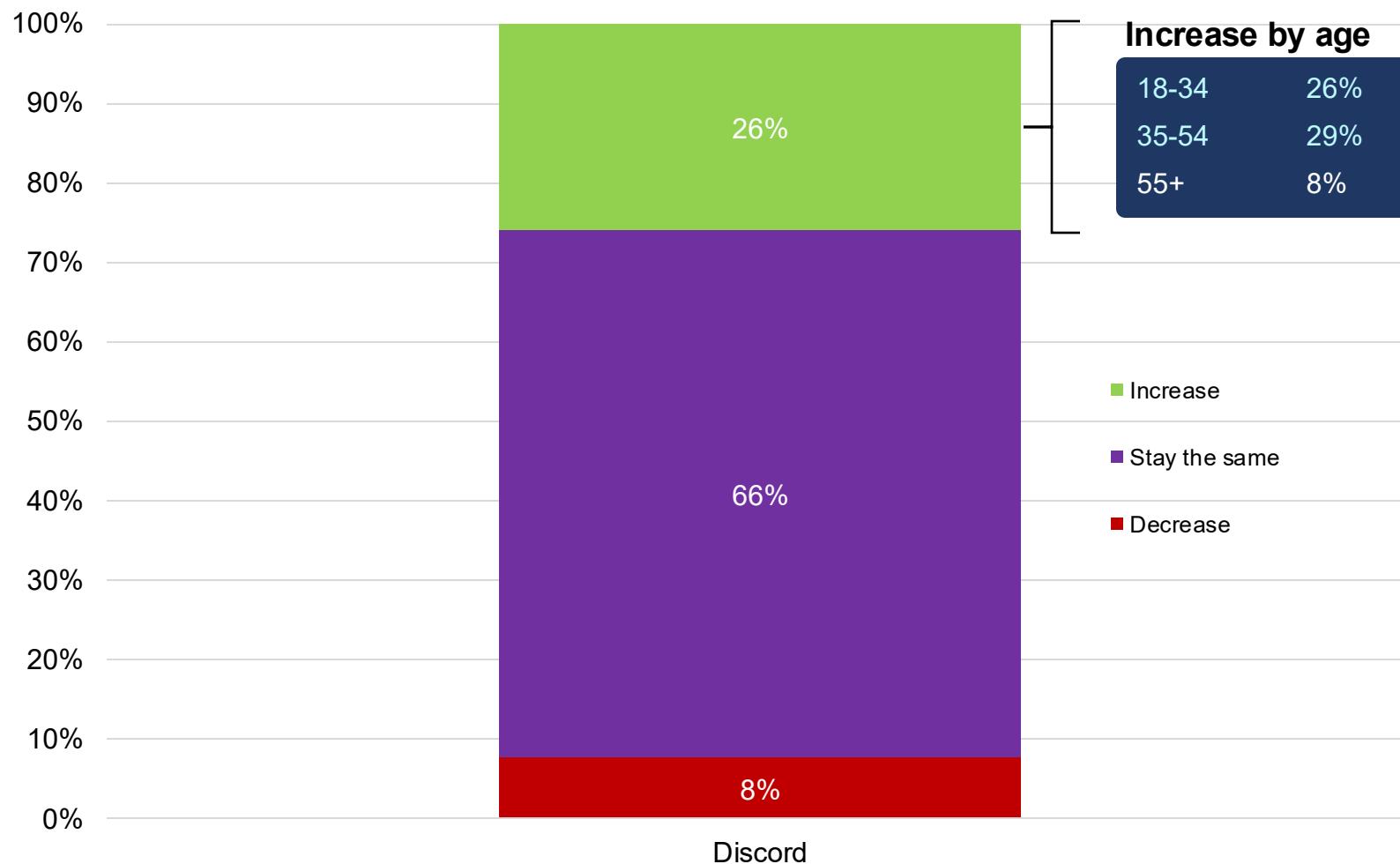


q107ac: How likely or unlikely are you to use Discord within the next year? (Among those who are currently using Discord N=208)

26% expect to increase their use of Discord within the next year. Increases are most likely among those 18 to 54.

45

Change of Discord use within the next year

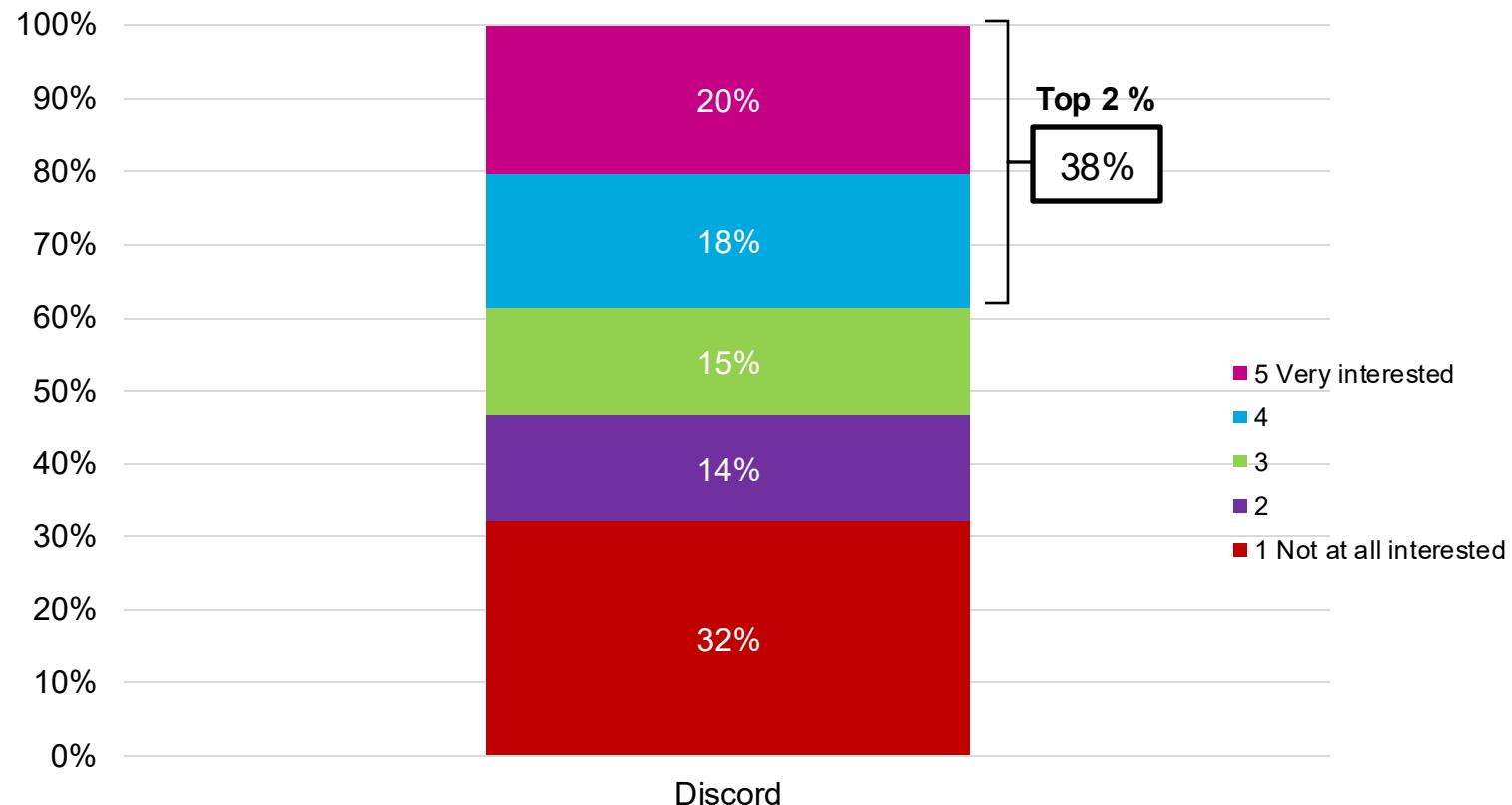


q107ad How do you think your use of Discord will change in the next year? (Among those who are currently using Discord; N=208)

38% of Discord users are interested in a paid tier service for \$9.99 a month with just 20% being very interested.

46

Interest in VIP subscription service from Discord that will provide additional services for \$9.99 per month

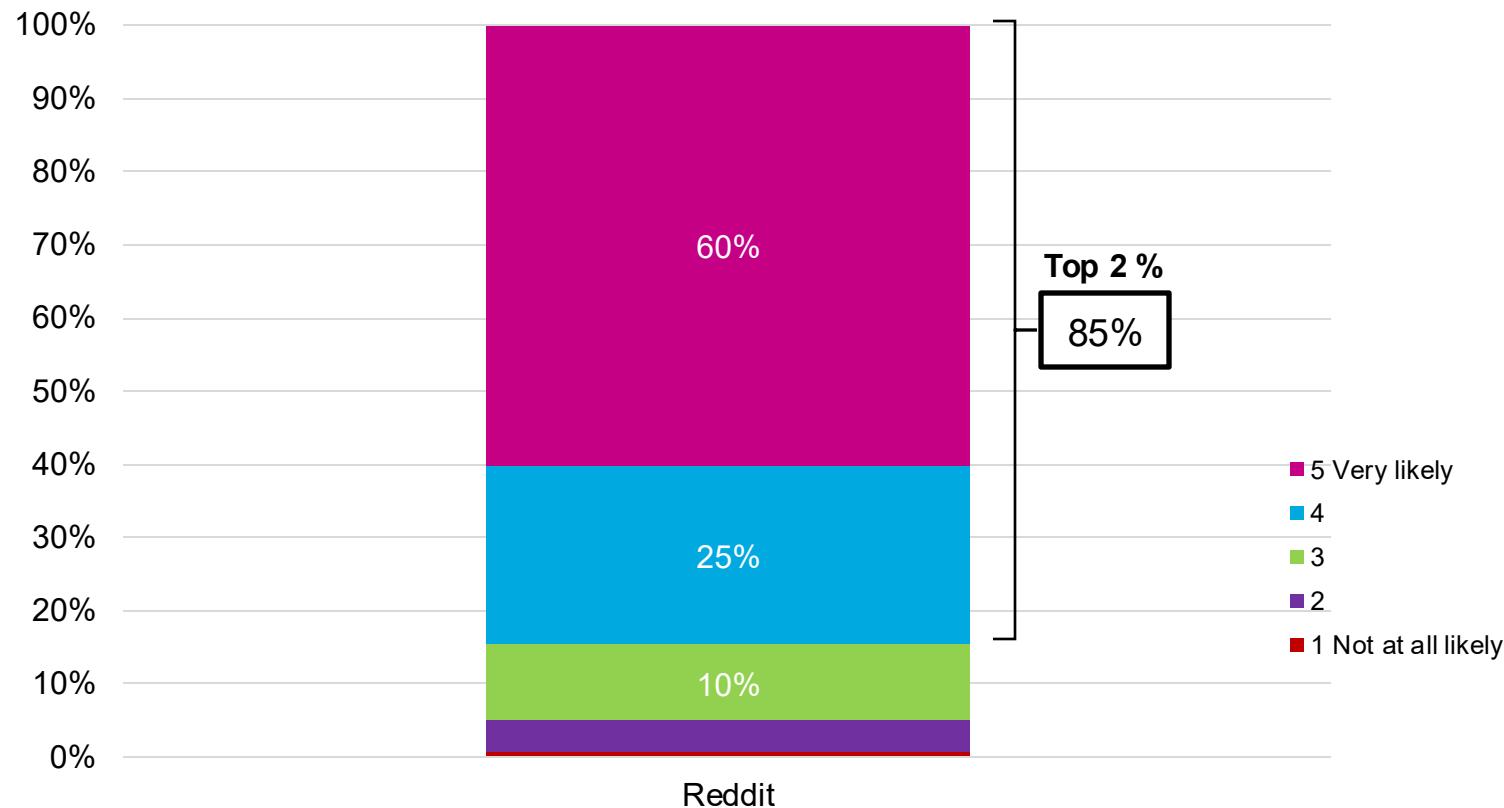


Q107ae: How would you rate your level of interest in a special VIP subscription service from Discord that will provide additional services to you priced at \$9.99 a month? (Among those who are currently using Discord N=208)

85% of current users expect to still be using Reddit in the next year. There are no significant demographic differences present.

47

Likelihood to use Reddit within the next year – Among current users

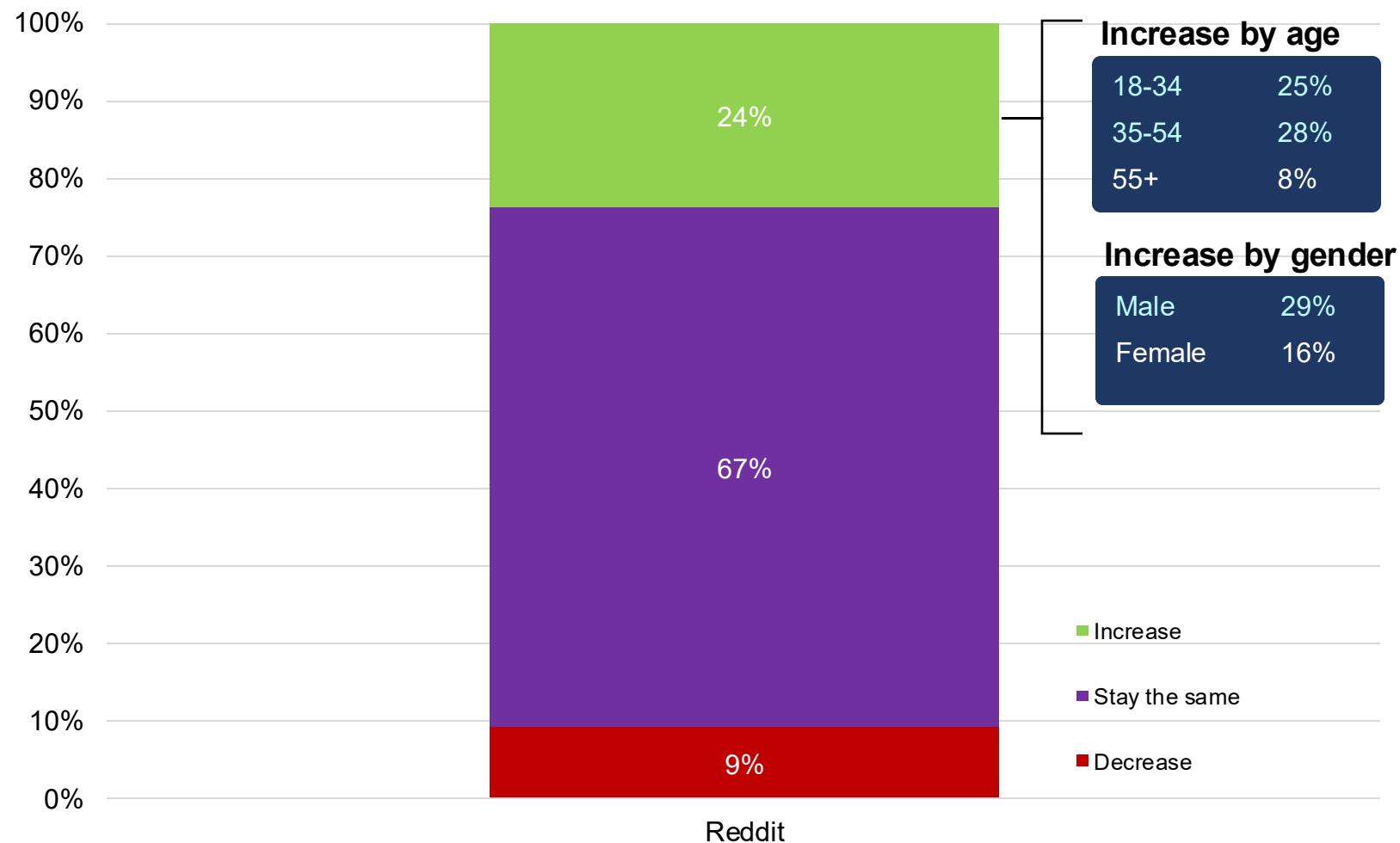


q107ac: How likely or unlikely are you to use Reddit within the next year? (Among those who are currently using Reddit; N=261)

24% expect to increase their use of Reddit within the next year driven by males and those under 55.

48

Change of Reddit use within the next year

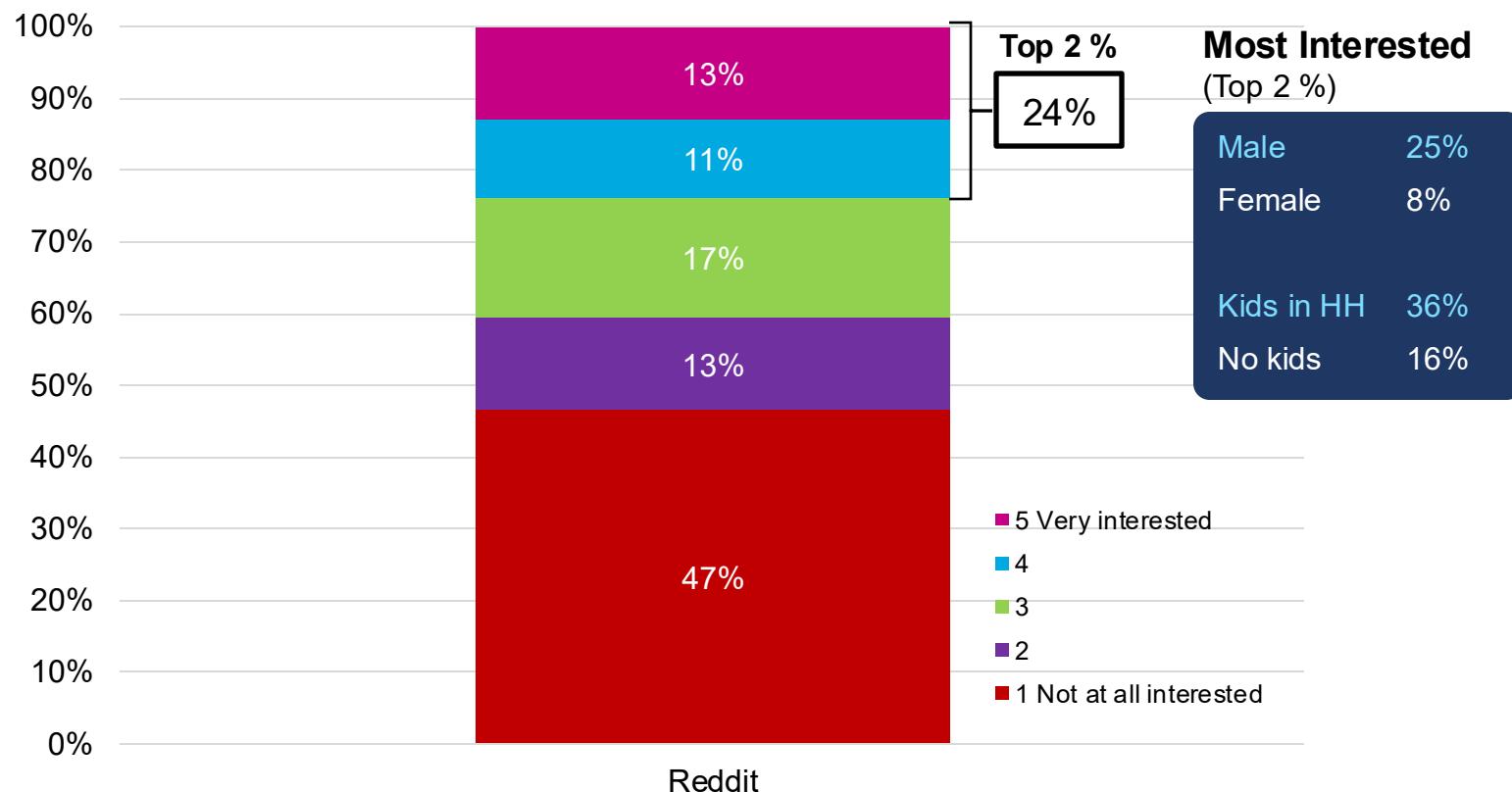


q107ad How do you think your use of Reddit will change in the next year? (Among those who are currently using Reddit N=261)

24% of Reddit users are interested in a paid tier service for \$9.99 a month. Only 13% are very interested in the idea of this service. Males and those with kids in the household were significantly more interested in this idea.

49

Interest in VIP subscription service from Reddit that will provide additional services for \$9.99 per month

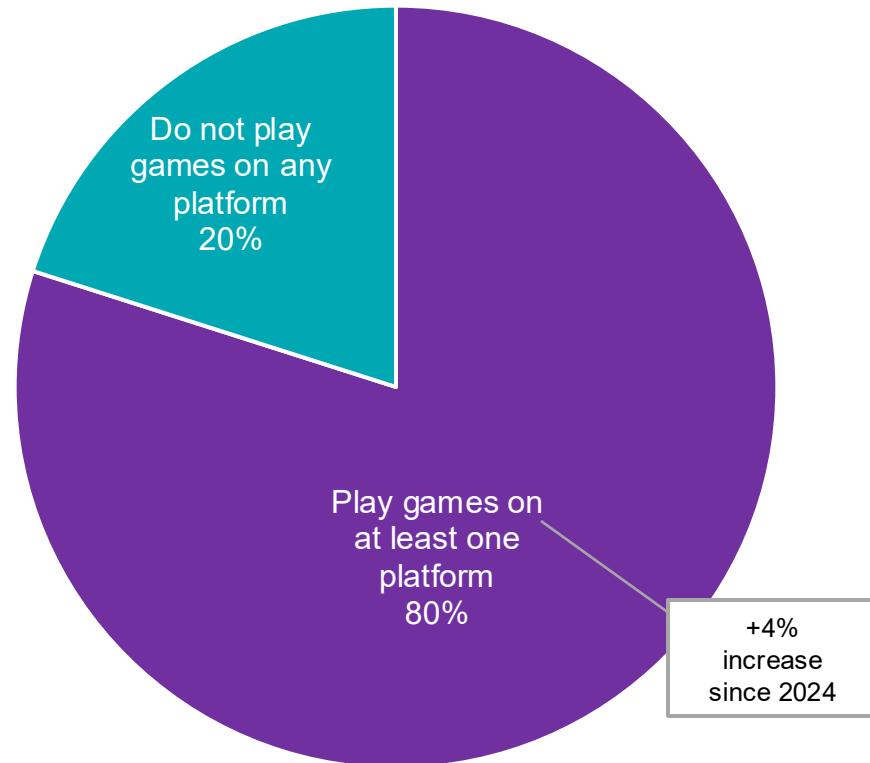


Q107af: How would you rate your level of interest in a special VIP subscription service from Reddit that will provide additional services to you priced at \$9.99 a month? (Among those who are currently using Reddit; N=261)

Gaming

80% of Americans play games on at least once platform. This is up 4% since 2024.

51



Play games on at least 1 platform by age

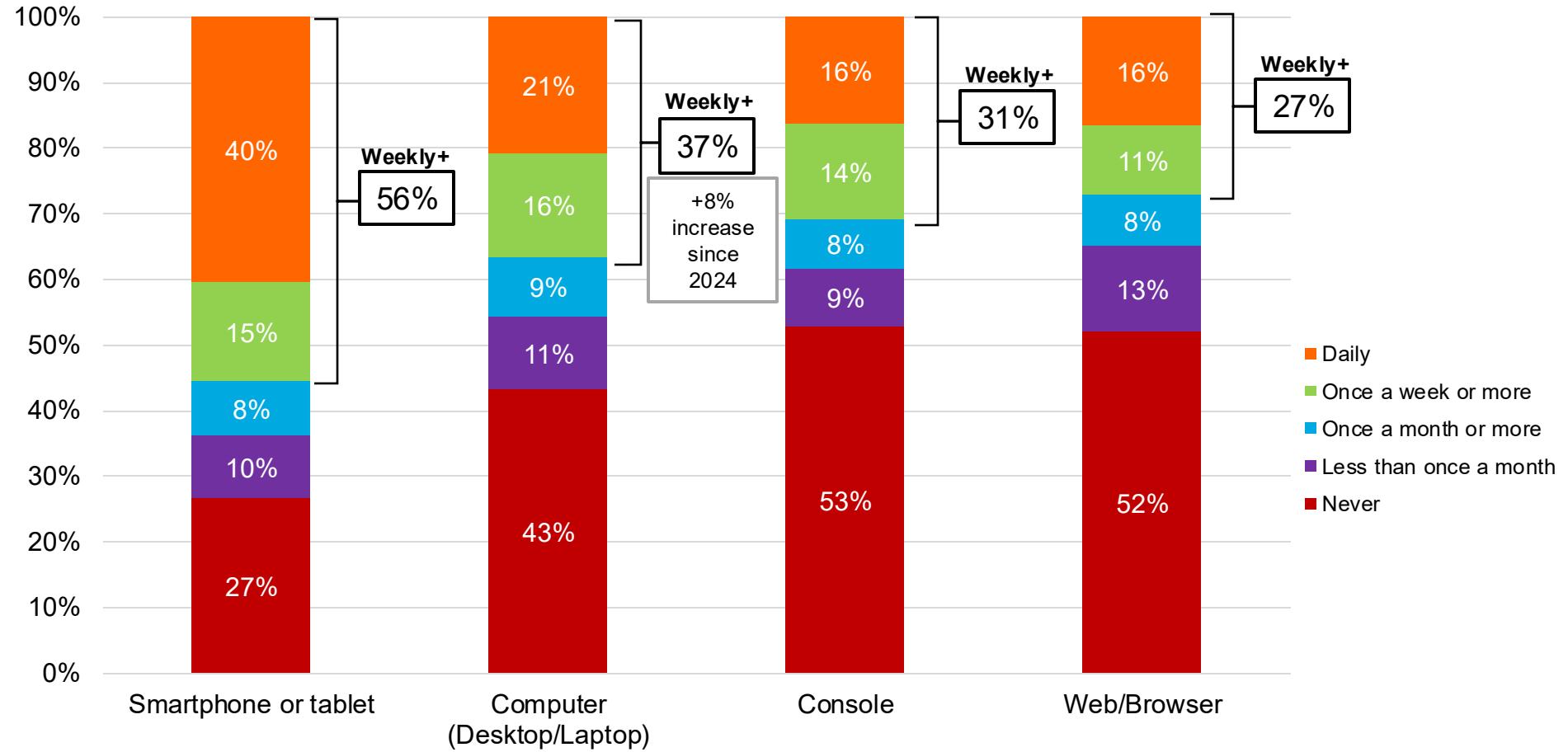
18-34	95%
35-54	87%
55+	64%

q109: How often do you play games on the following? (N=2,000)

56% play games daily on a smartphone or tablet. Since 2024, frequent computer game play is up 8%.

52

Frequency of gameplay by platform

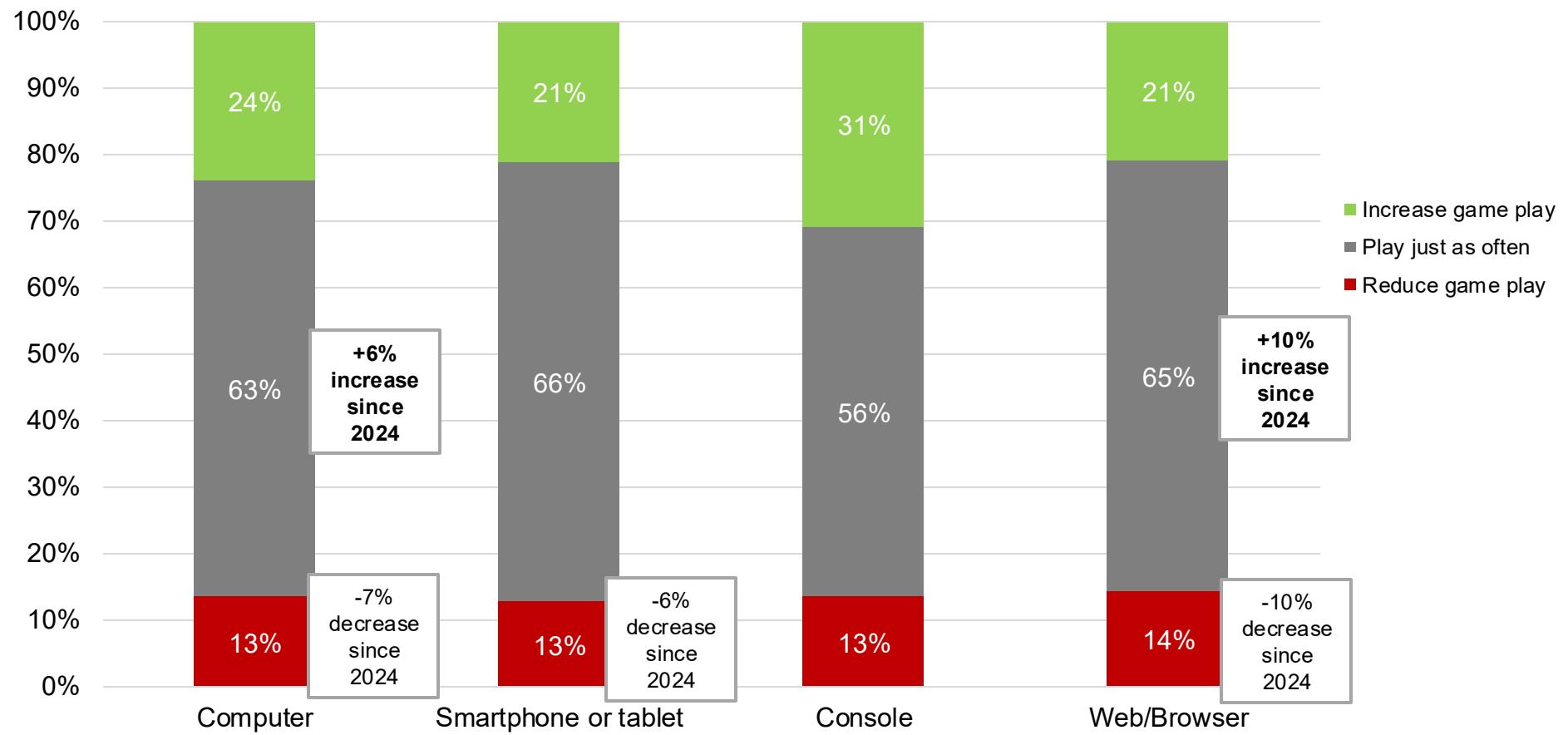


q109: How often do you play games on the following? (N=2,000)

On average, 24% plan to increase their gameplay in the next 6 months. Console players are more likely than other platforms to anticipate increasing gameplay. There were significant decreases in game play reduction compared to 2024.

53

Anticipated frequency of gameplay in the next year by platform

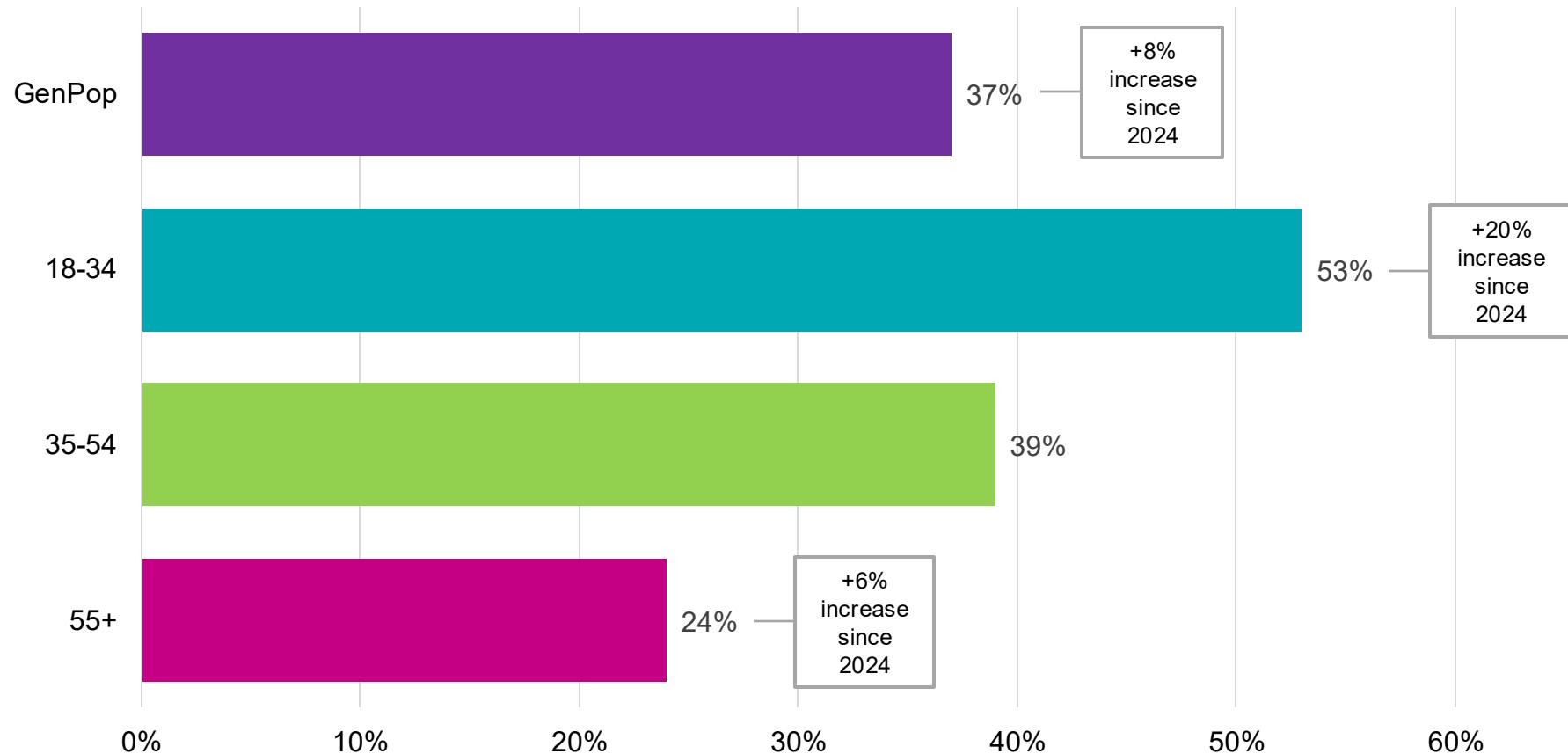


q217d: In the next 6 months, are you planning to reduce, increase, or play just as often on the following platforms? (Among those who play games on each platform; Computer N=1,135; Smartphone or tablet N=1,466; Console N=942; Web or browser N=958)

Since 2024, there was an 8% increase in those who report playing games on a computer once a week or more often. This was driven by those 18 to 34 who are playing games on a computer more frequently compared to last year.

54

Play games on a computer (Desktop/Laptop) once a week or more

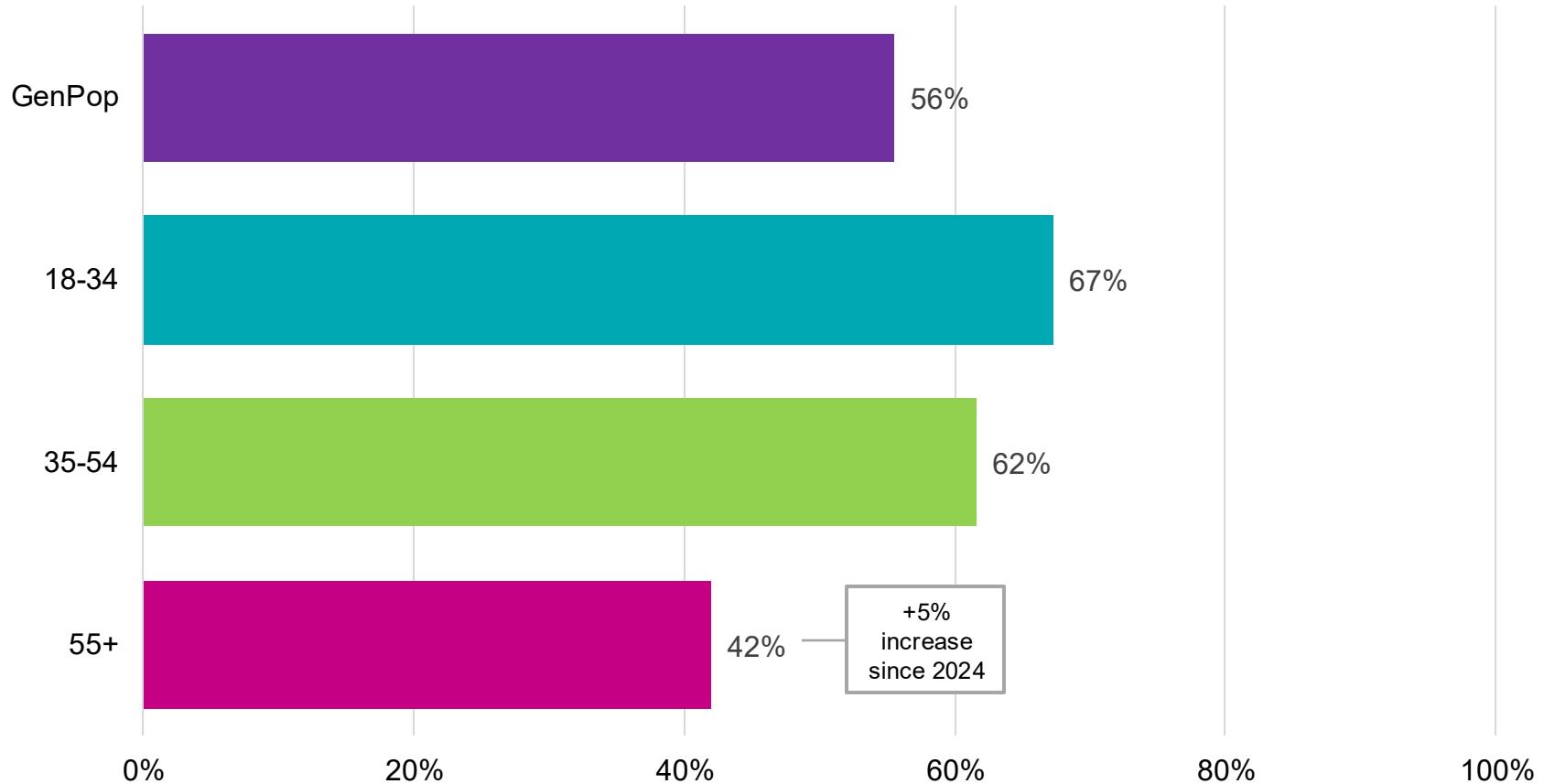


q109: How often do you play games on a computer (Desktop/Laptop)? (N=2,000)

56% of Americans play games on smartphone or tablet. This is in line with the 55% reported in 2024. There was a 5% increase in weekly gameplay on phones among those 55+

55

Play games on a smartphone or tablet once a week or more

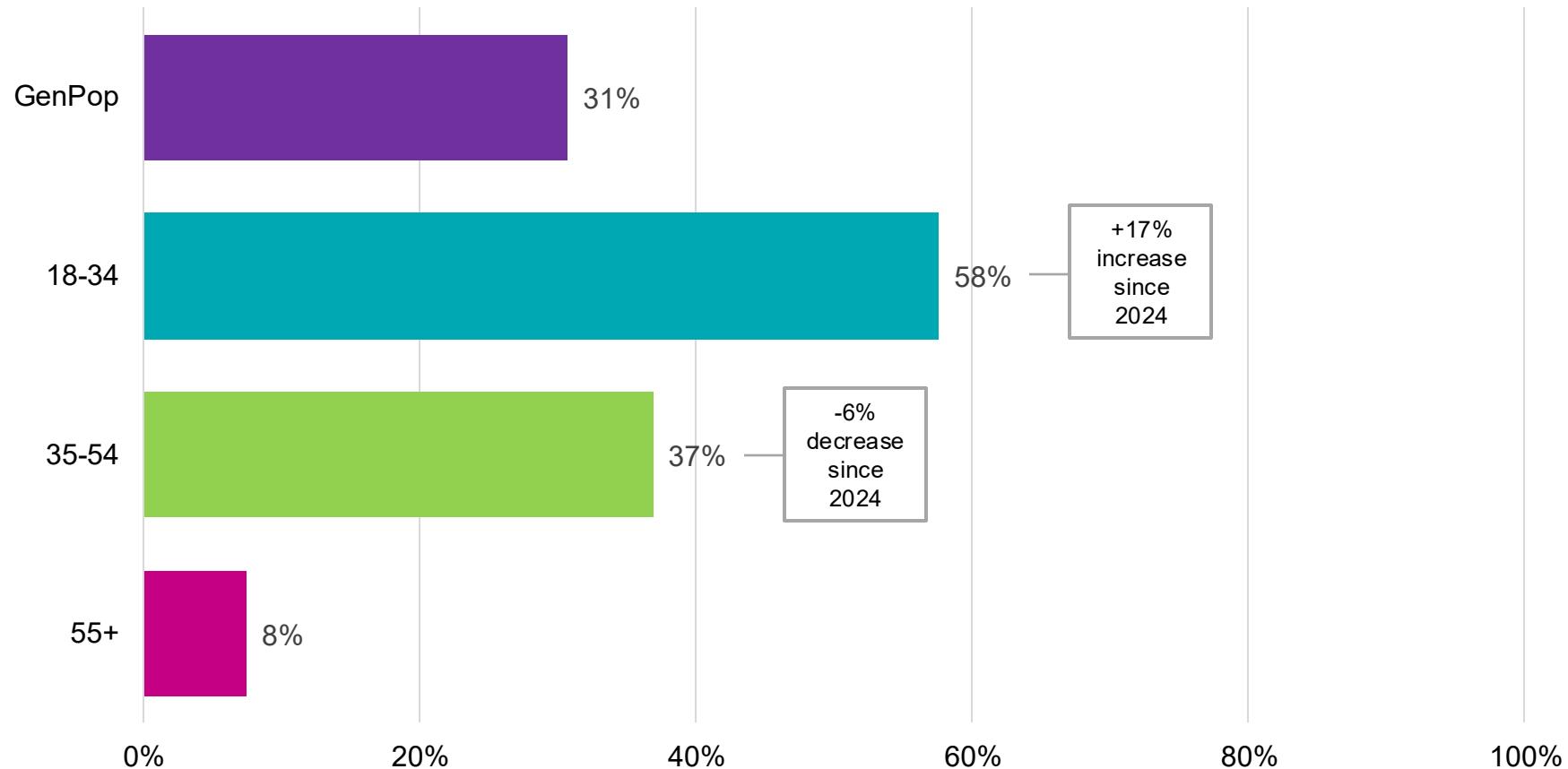


q109: How often do you play games on a smartphone or tablet? (N=2,000)

31% of Americans play games on console weekly or more often. Regular console game play is up 17% among those 18 to 34 compared to 2024.

56

Play games on a **console** once a week or more

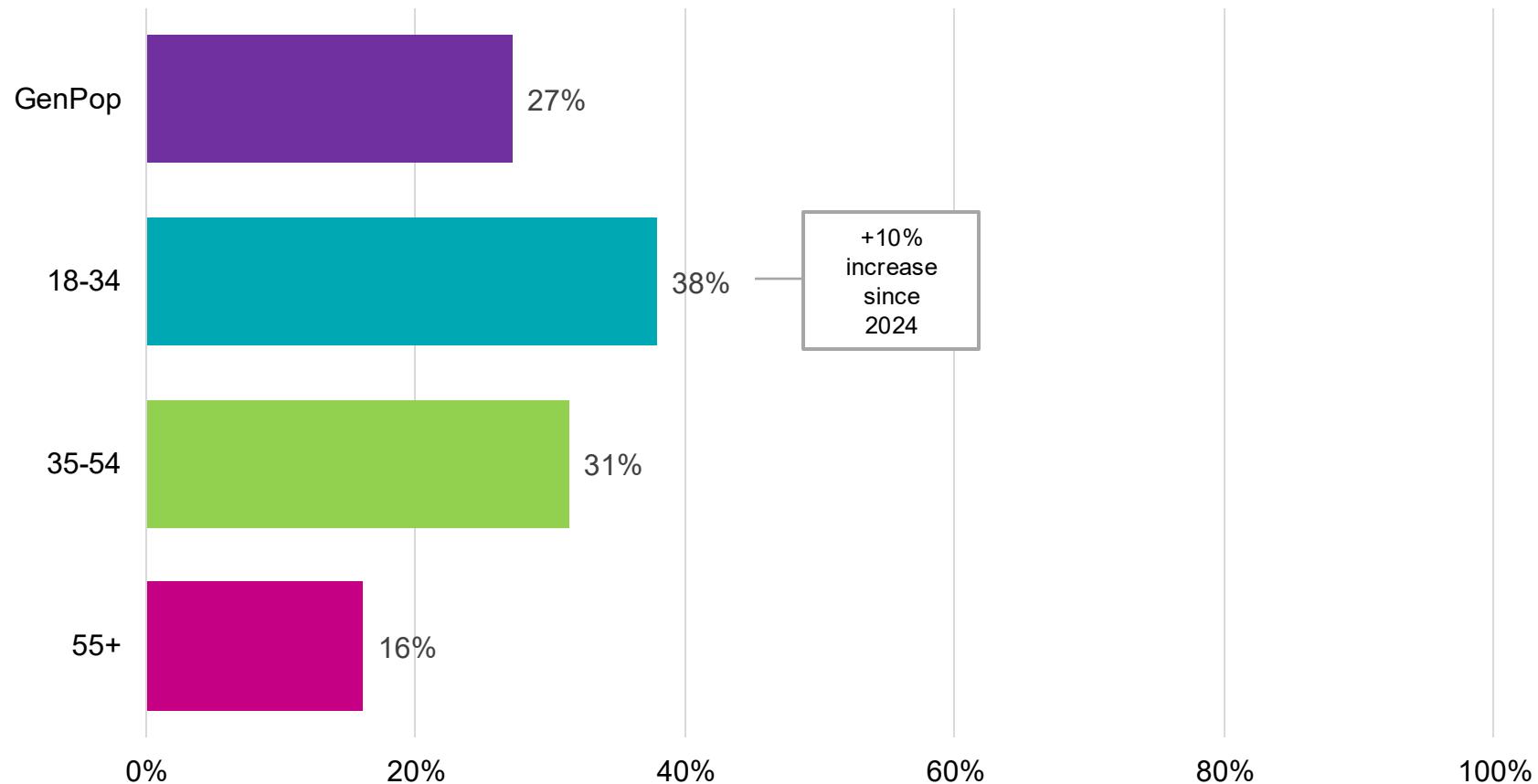


q109: How often do you play games on a console? (N=2,000)

27% of Americans play games on the web or through a browser weekly or more often. This is a 3% increase year over year driven by more weekly play among 18-34.

57

Play games on Web/Browser once a week or more

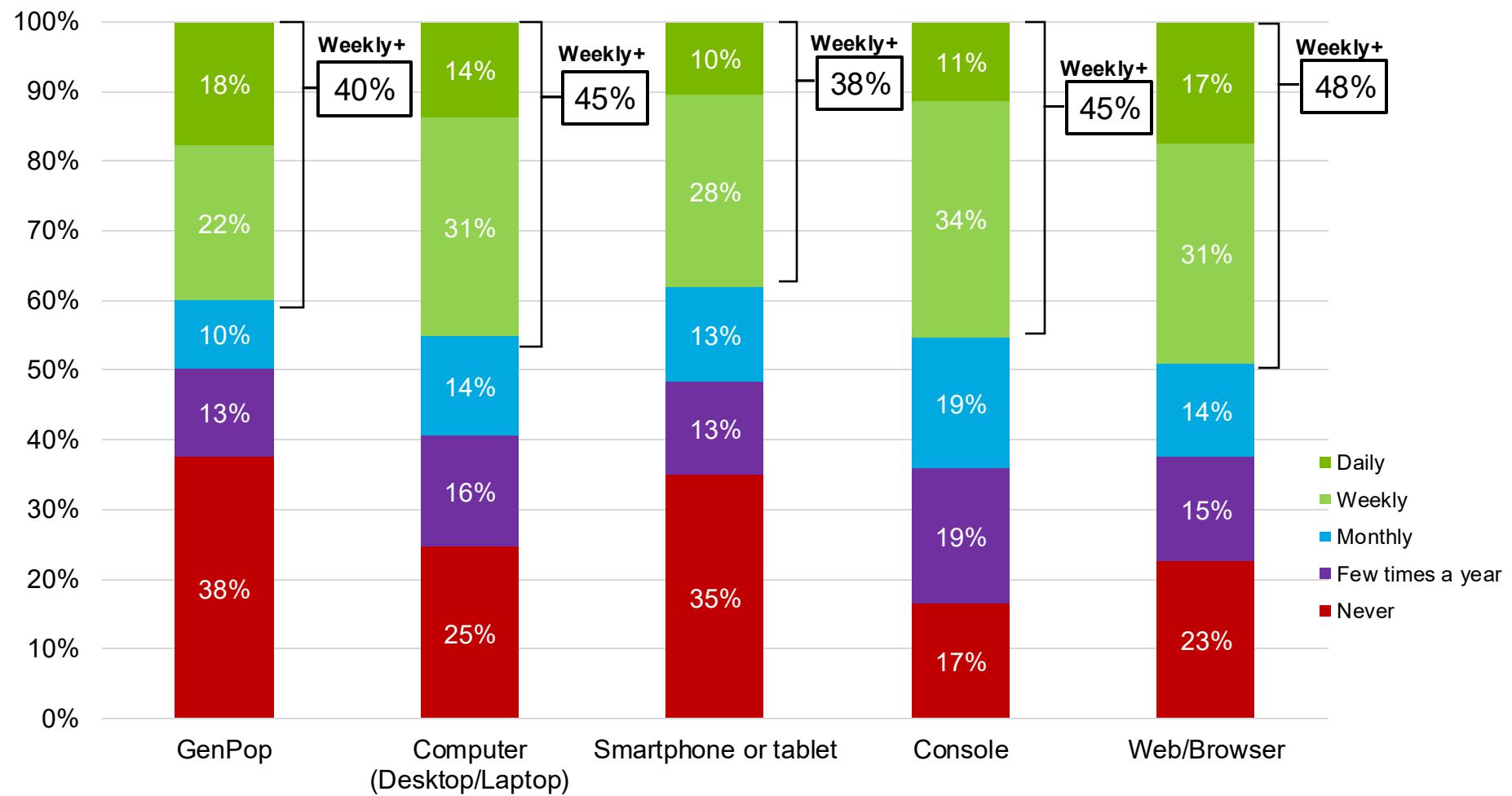


q109: How often do you play games on Web/Browser? (N=2,000)

40% of those who play games on any platform pay with others. Regular social game play is much less likely on a smartphone or tablet.

58

Frequency of game play with others

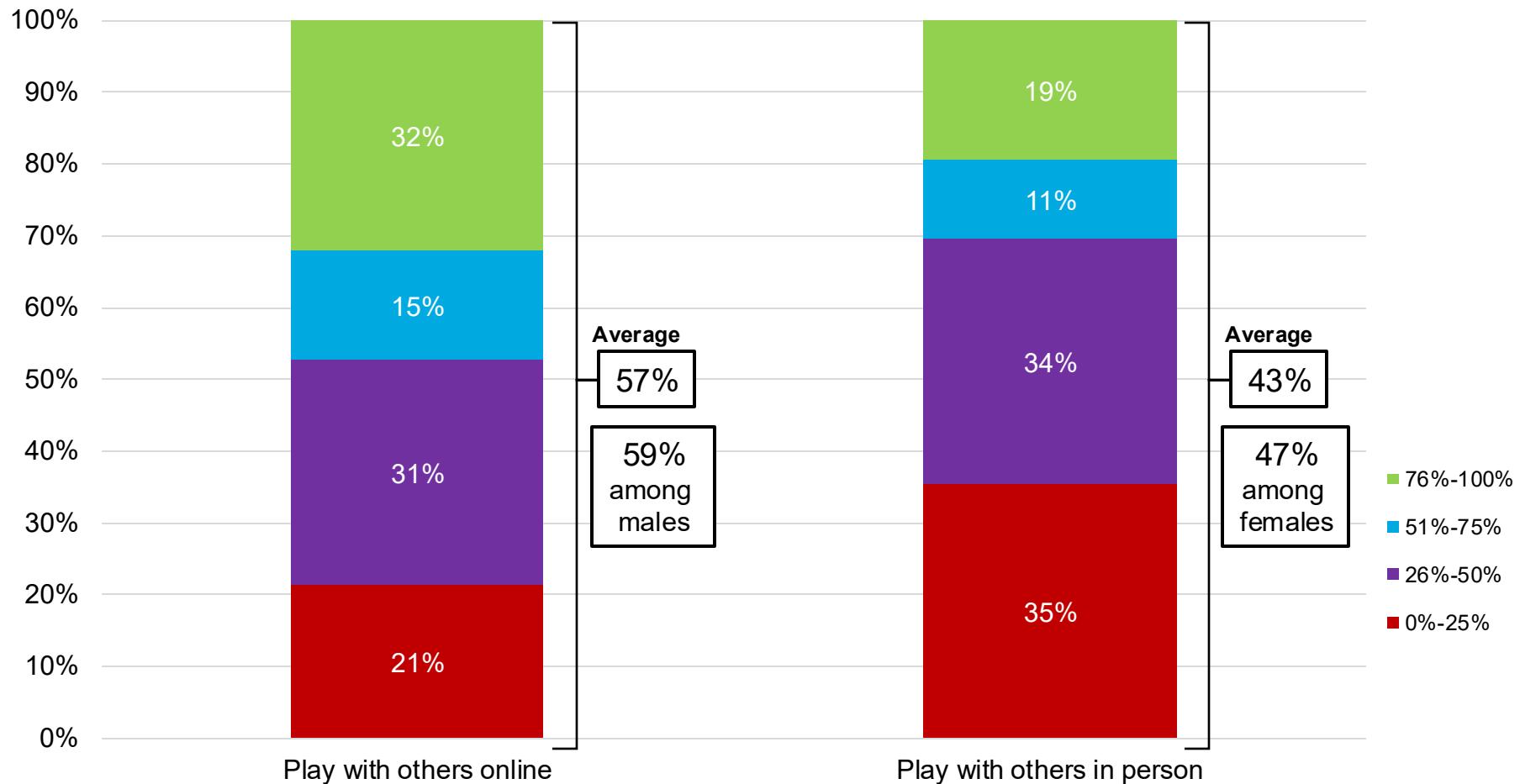


q119ab: How often do you play video games with others? (Among those who play games on each platform)

Those who report playing games with others play with others 57% of the time they play. 43% play with others in person. Males are more likely to play online with friends and females are more likely to play in person with others.

59

Percentage of time playing games with others online vs in person.

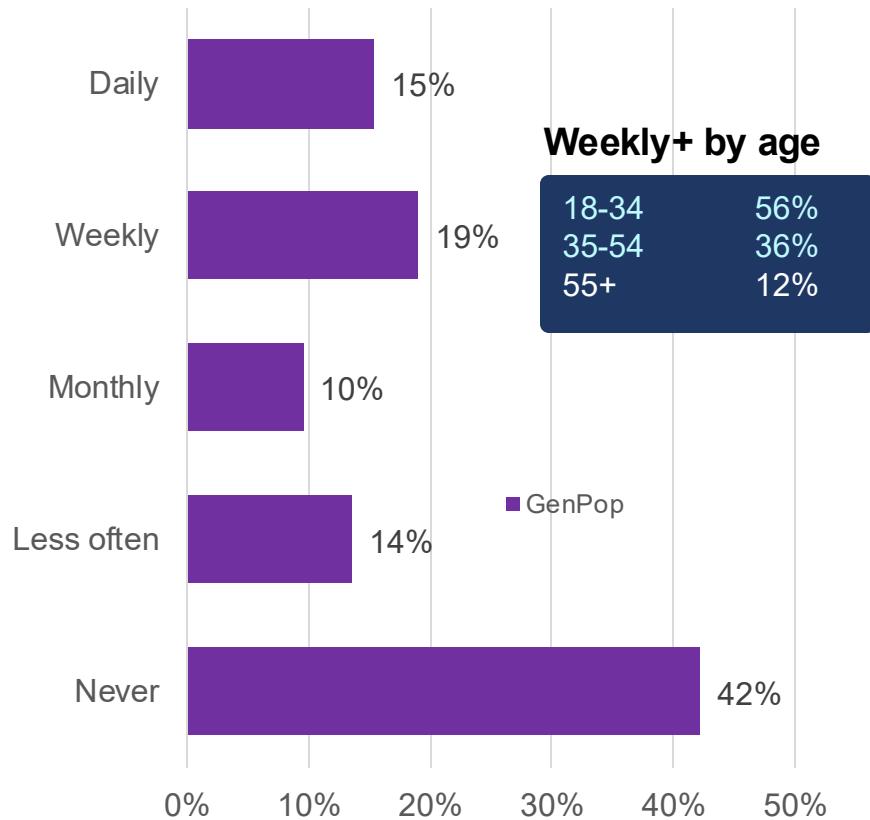


q119aca: How often do you play video games with others online vs in person? (Among those who play games with others; N=999)

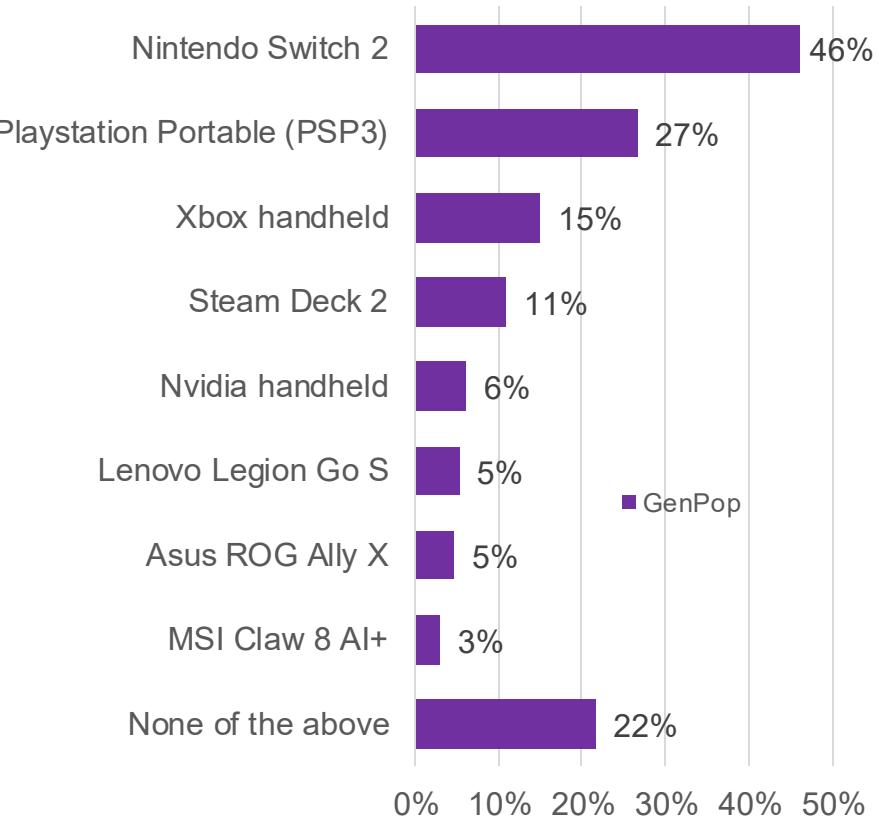
34% of those who play games play on a handheld device weekly or more often. More than half of those 18 to 34 play on them weekly+. The Nintendo switch is the device that excites players of handheld games followed by PSP3.

60

Frequency of game play on handheld gaming device



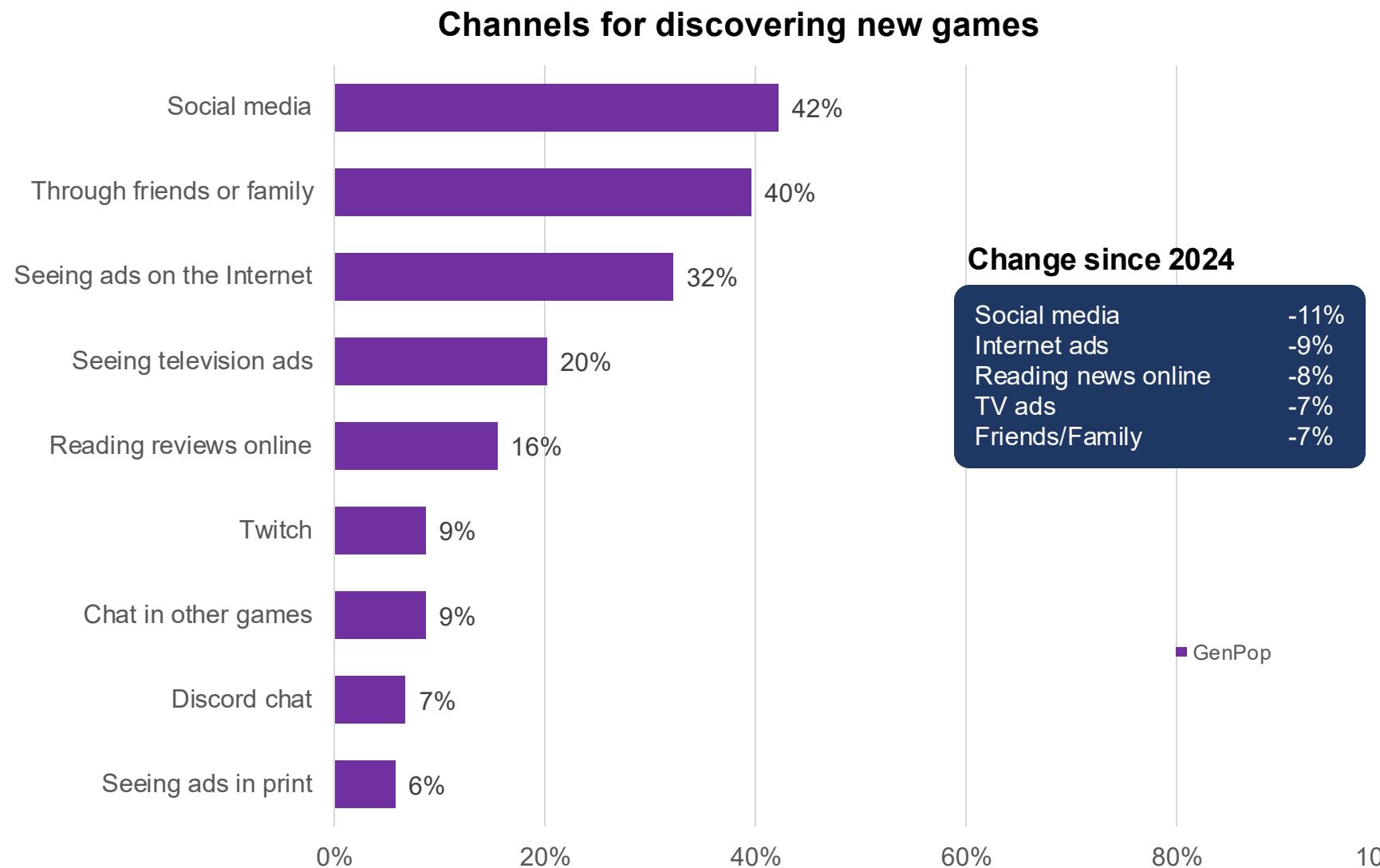
Handheld devices that excite handheld gamers the most



q217daa: How often do you play games using a handheld gaming device? (Among those who play games; N=1,599) q217db: Which of the following handheld gaming devices excite you the most? (Among those who play handheld game devices; N=923)

All reported channels for discovering new games were down this year over 2024. Social media, Internet ads, and reading news online saw the sharpest declines.

61



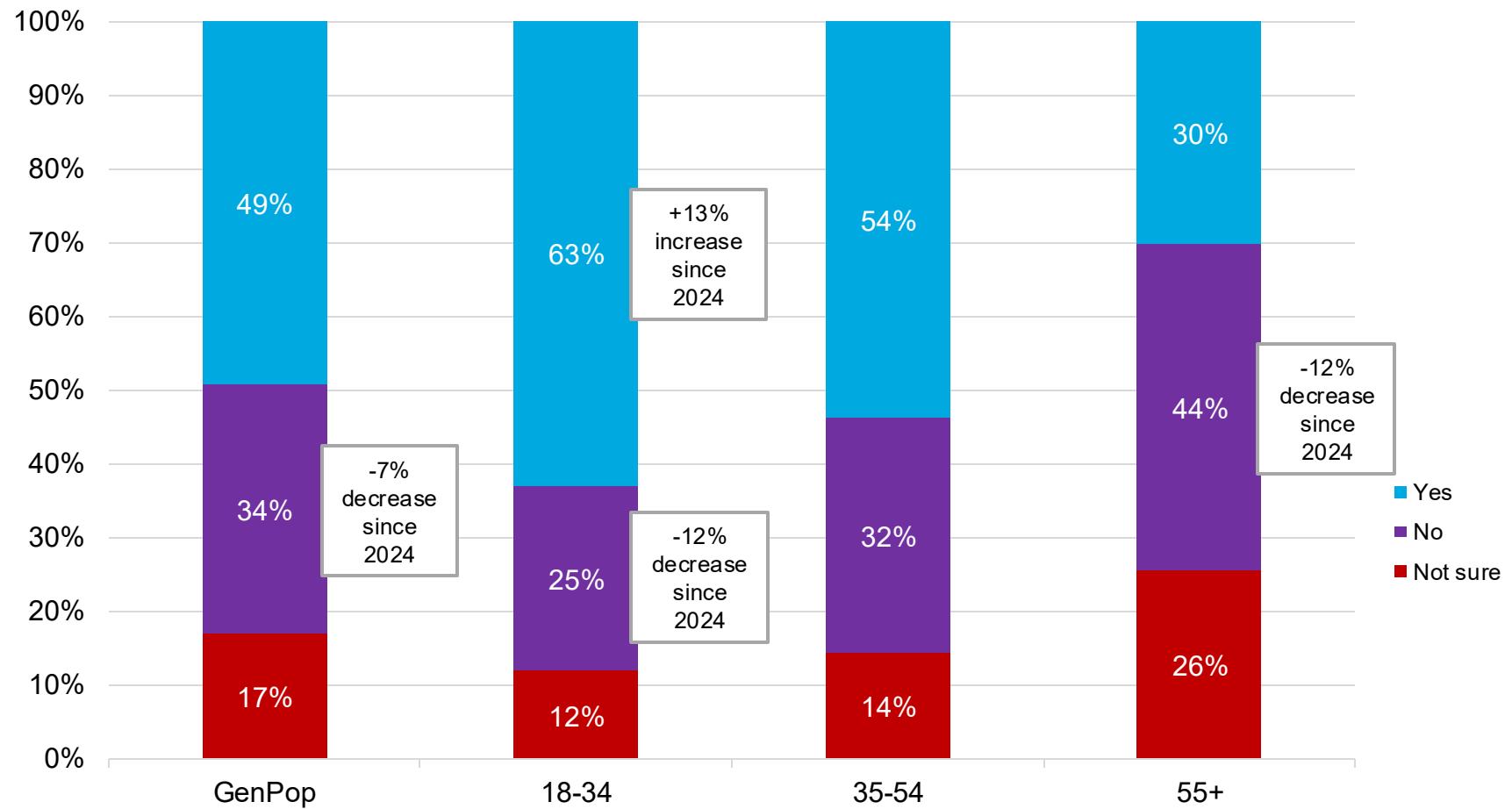
q27b: Which of the following have led you to discover new games within the last year? (Among total; N=2,000; multiple responses)

Cloud Gaming

49% of Americans are aware of cloud gaming services, which is 4% higher than 2024. The increase is driven by an increase in awareness among those 18 to 34.

63

Cloud gaming service awareness

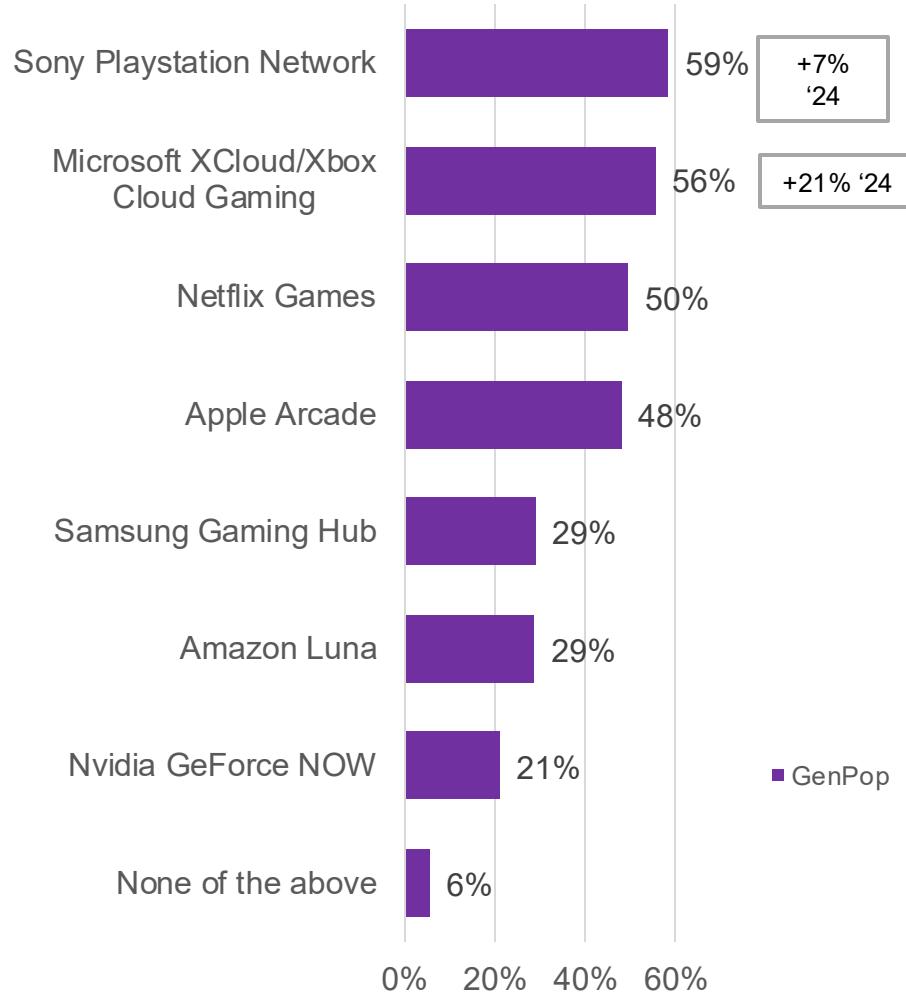


q119ad: Are you aware of the various cloud gaming services available to consumers? (Among those who play games on any device; N=1,599)

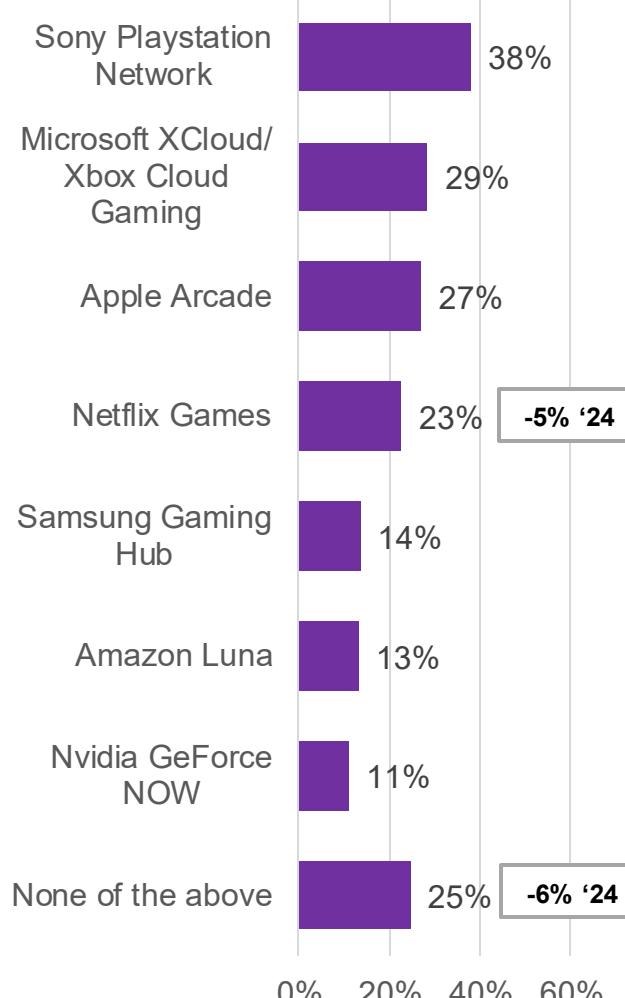
Significantly more are aware of Sony and XCloud gaming services compared to 2024. 6% more are likely to have used a cloud gaming service year over year.

64

Cloud gaming service brand awareness



Cloud gaming service use

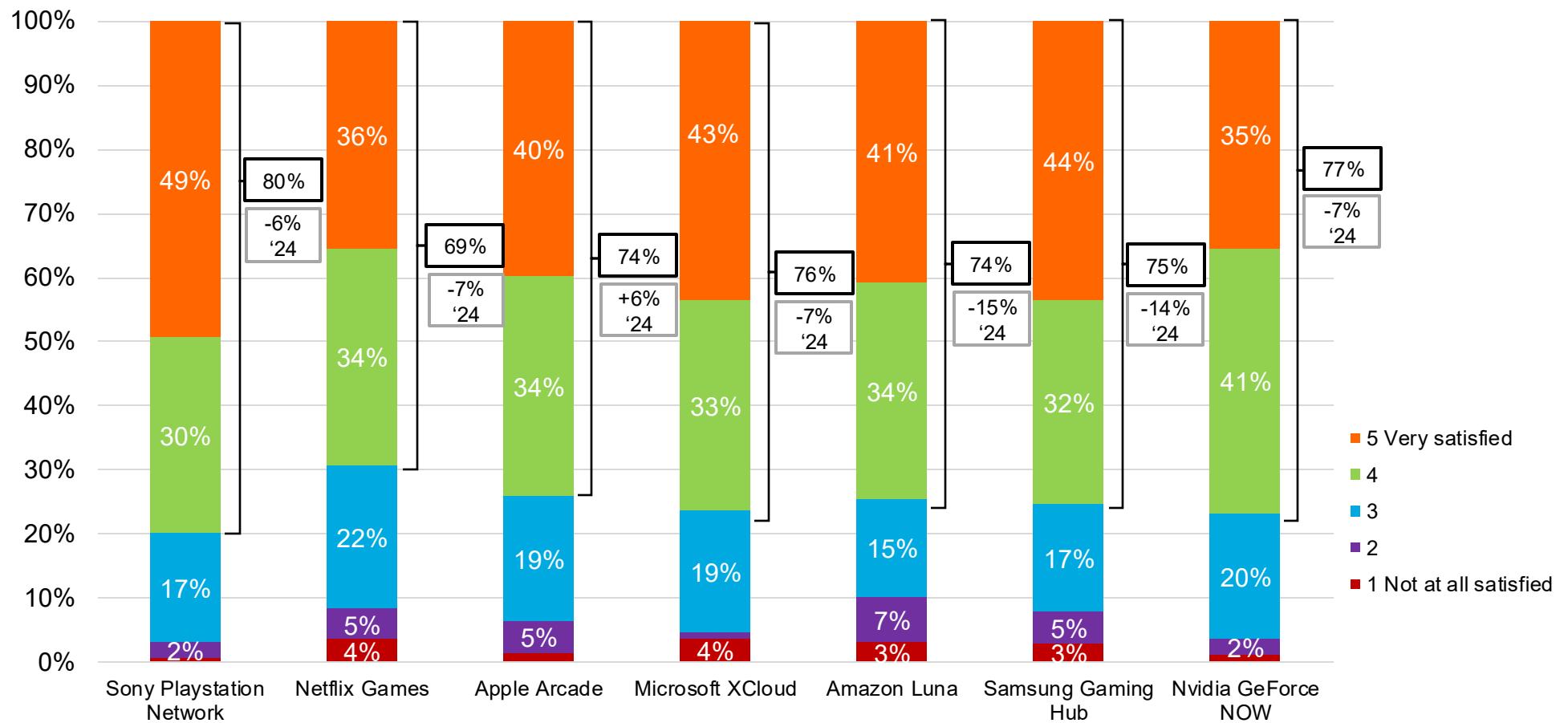


q119ae: Which of the following cloud gaming services have you heard of? (Among those aware of cloud gaming services; N=788; multiple response) q119af: Which of these cloud gaming services have you used? (Among those aware of at least 1 gaming service; N=742 Multiple response)

Apple Arcade was the only cloud gaming service that saw an increase in overall satisfaction compared to 2024. Sony satisfaction is clearly leading given the number of those aware of and using the platform.

65

Satisfaction with cloud gaming services



q119ag: How would you rate your level of satisfaction with the following cloud gaming services? (Among those who have used each service)

When asked unaided what users find appealing about the various services, game selection, game quality, quality of service/speed, and ease of use are the top drivers for all services examined.

66

Appeal drivers for cloud gaming services

Appeal Drivers	#1	#2	#3	#4	#5
Amazon Luna	Non-specific positive (15%)	Ease of use (13%)	Game selection (10%)	Service quality (9%)	Game quality (8%)
Microsoft Xcloud	Game selection (23%)	Service quality (12%)	Ease of use (10%)	Non-specific positive (10%)	Multi-device play (7%)
Nvidia GeForce Now	Non-specific positive (16%)	Service quality (15%)	Graphics (15%)	Everything (10%)	Game selection (8%)
Samsung Gaming Hub	Non-specific positive (18%)	Game quality (13%)	Game selection (10%)	Everything (9%)	Service quality (8%)
Apple Arcade	Game selection (27%)	Ease of use (14%)	Game quality (11%)	Non-specific positive (10%)	Price point (5%)
Netflix Games	Non-specific positive (17%)	Game selection (16%)	Game quality (15%)	Ease of use (12%)	Price point (9%)
Sony PlayStation Network	Game selection (27%)	Non-specific positive (12%)	Service quality (10%)	Ease of use (9%)	Graphics (8%)

q119ah: What about these cloud gaming services do you find appealing? (Among those who have used each service)

Top improvement suggestions for cloud gaming services

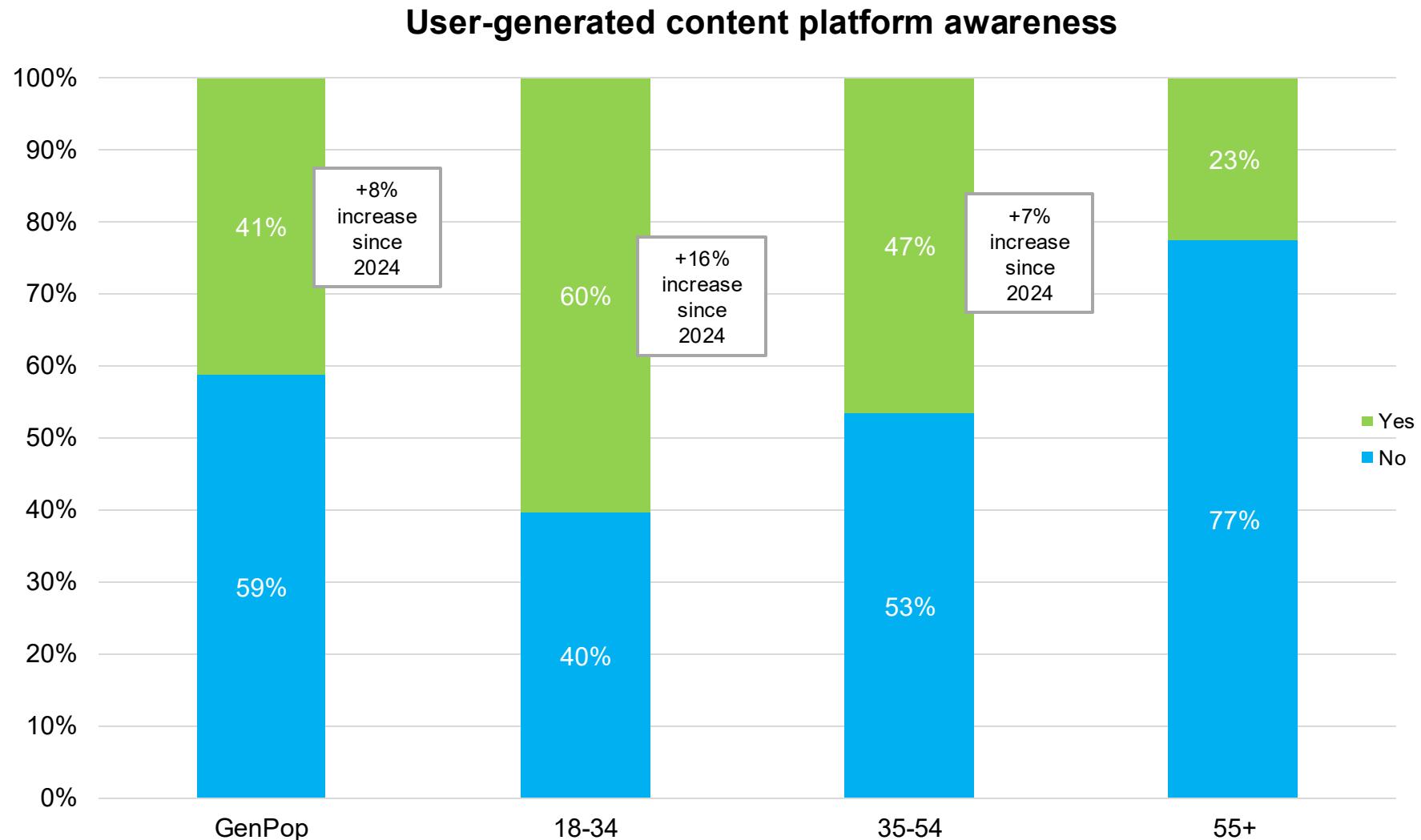
Appeal Drivers	#1	#2	#3	#4	#5
Amazon Luna	Game selection (35%)	Audio/Graphics (15%)	None needed (13%)	Better service (13%)	Price (10%)
Microsoft Xcloud	None needed (20%)	Better service (19%)	Game selection (18%)	Price (16%)	Game quality (4%)
Nvidia GeForce Now	None needed (20%)	Game selection (20%)	Better service (20%)	Price (13%)	Game quality (11%)
Samsung Gaming Hub	None needed (34%)	Game quality (19%)	Better service (11%)	Game selection (9%)	The Brand (9%)
Apple Arcade	Game selection (33%)	None needed (21%)	Price (19%)	Game quality (6%)	Better service (5%)
Netflix Games	Game selection (34%)	None needed (15%)	Better service (14%)	Price (10%)	Game quality (9%)
Sony PlayStation Network	Price (30%)	None needed (18%)	Better service (16%)	Game selection (14%)	Audio/Graphics (8%)

q119aia: What would you improve with the following cloud gaming services? (Among those who have used each service)

Creator Content

41% of Americans are aware of user-generated content platforms. There was an 8% increase in awareness compared to 2024 driven by those under 55.

69

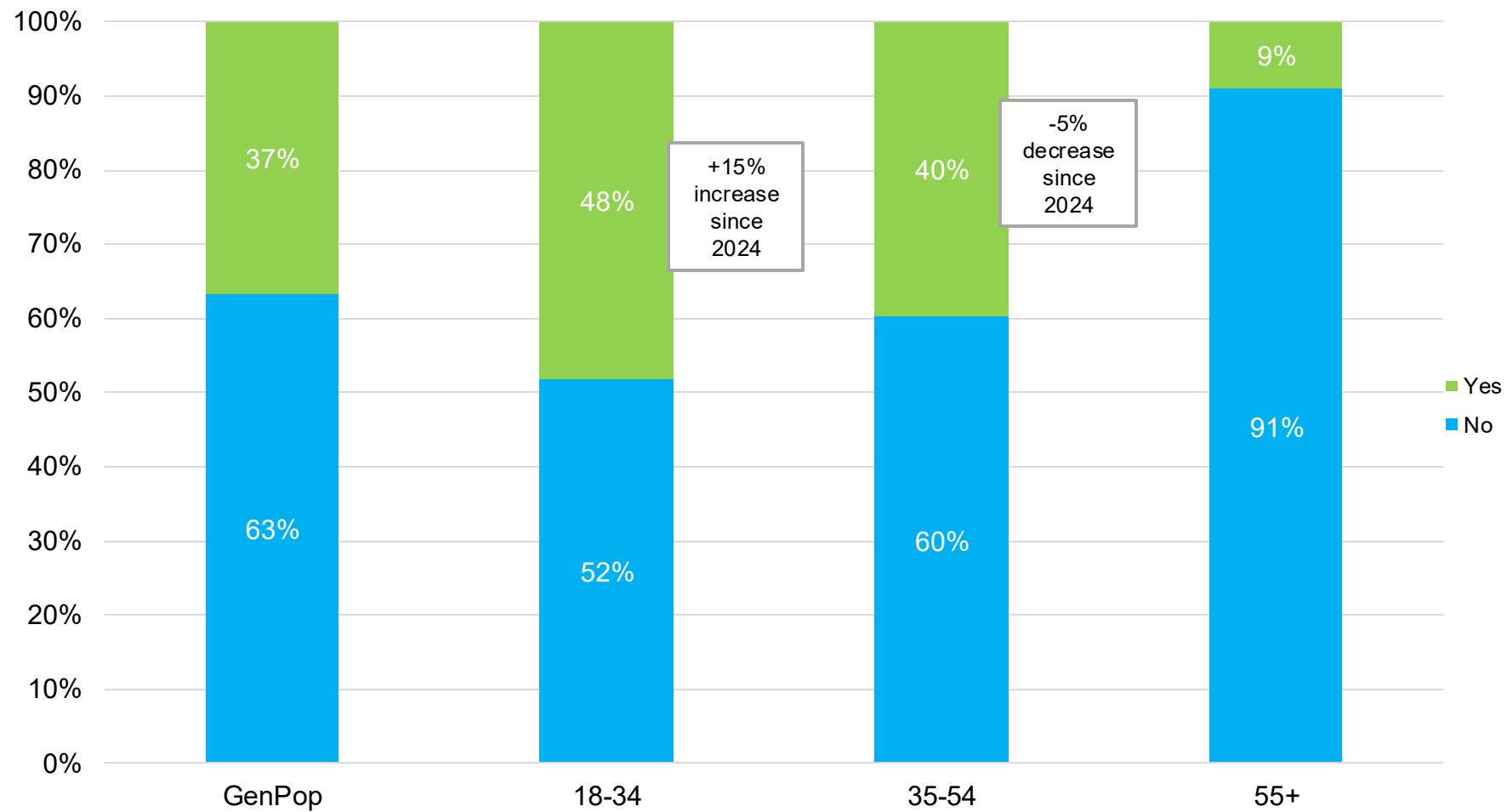


q35: Are you aware that services and platforms exist that allow individuals to create their own digital or virtual content for video games, including console, mobile, PC, and Web games? (Among those who play games on at least one platform; N=1,749; Those who said "not sure" n=251)

37% of those aware of user generated content have used a service or platform to create it. Use is up 4% since 2024 driven by increases use by those under 55.

70

Used service or platform to create user-generated content

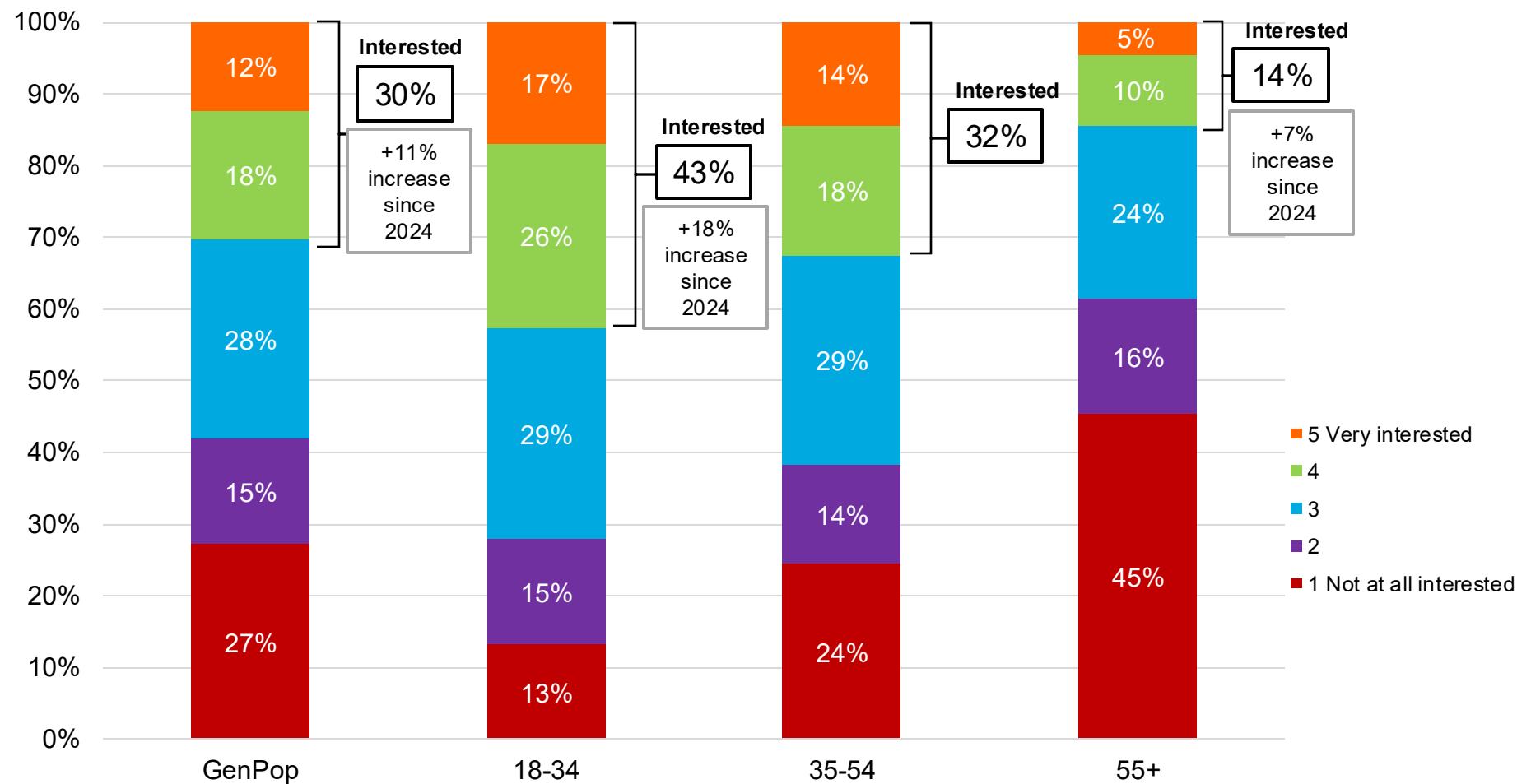


q35a: Have you ever used a service or platform that allows you to create your own digital or virtual content for video games including console, mobile, PC and web games? (Among those who are aware of UGC; N=720)

Non-users interest is up 11% to 30% compared to 2024.

71

Non-user interest in service or platform for creating UGC



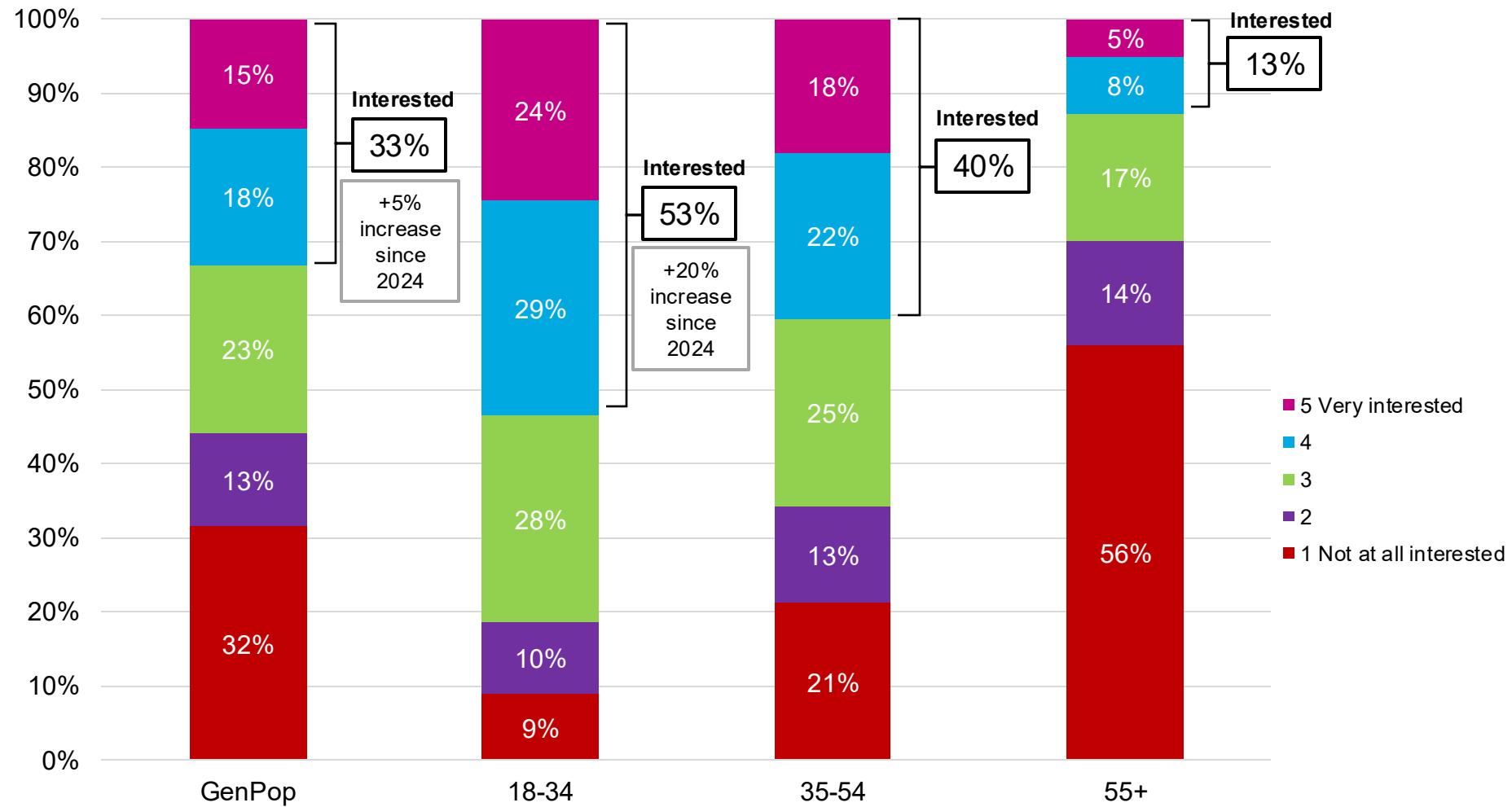
q35b: How would you rate your level of interest in trying a service or platform that allows you to create your own digital or virtual content for video games including console, mobile, PC and web games? (Among those who have never used a platform or service for creating UGC; N=456)

Game Creation Platforms

One third of Americans are interested in tools or platforms that help non-programmers build games. There was a 20% increase in interest among those 18 to 34 year over year.

73

Interest in tools or platforms that help non-programmers build games

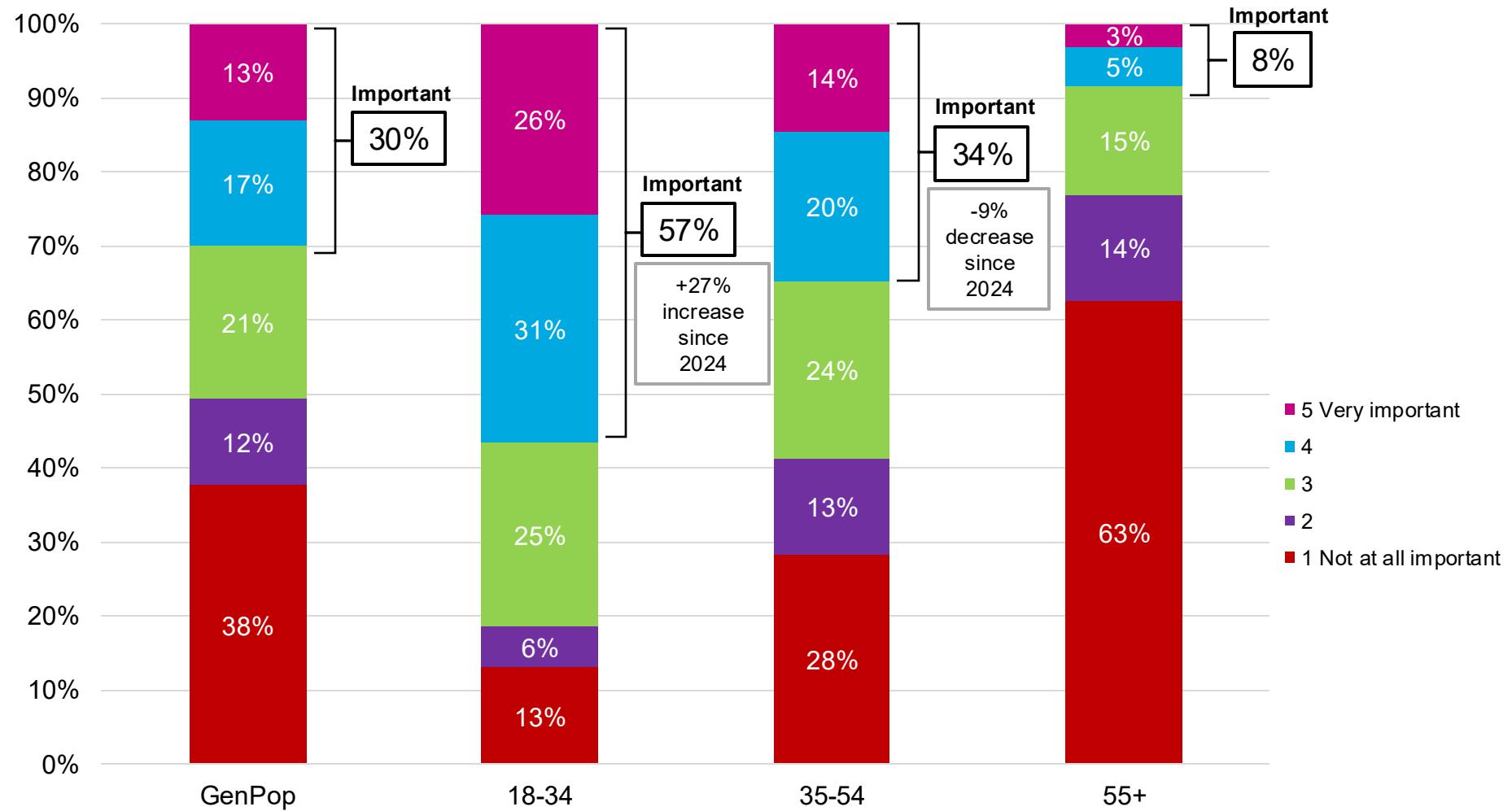


q46: How would you rate your level of interest in tools and platforms that make it possible for people who do not know computer programming to build a digital game? (N=2,000)

57% of those 18 to 34 find viewing game play and video game content important when looking for new games. This is a 27% increase compared to 2024.

74

Importance of viewing gameplay and video game content in game discovery

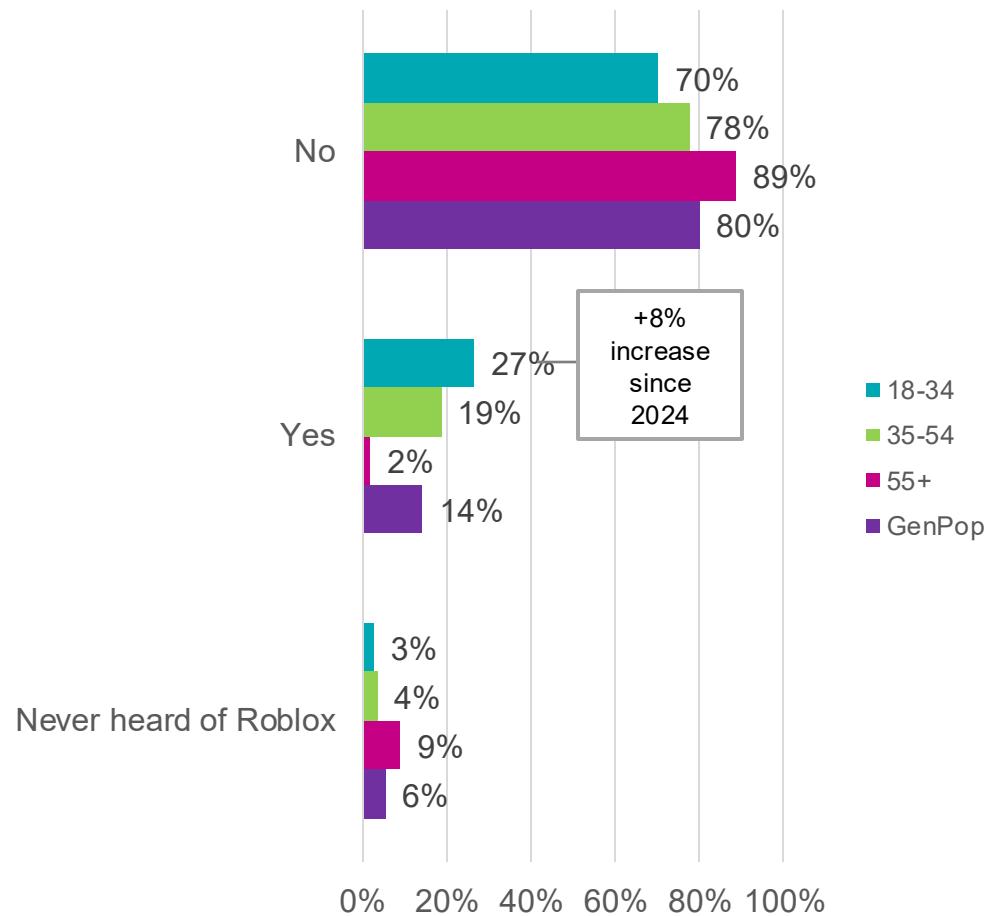


q109ba: How important is viewing gameplay and video game content, such as game livestreams on Twitch, and videos about games on YouTube and other digital services, in helping you to find/discover a game that you will download and/or purchase? (N=2,000)

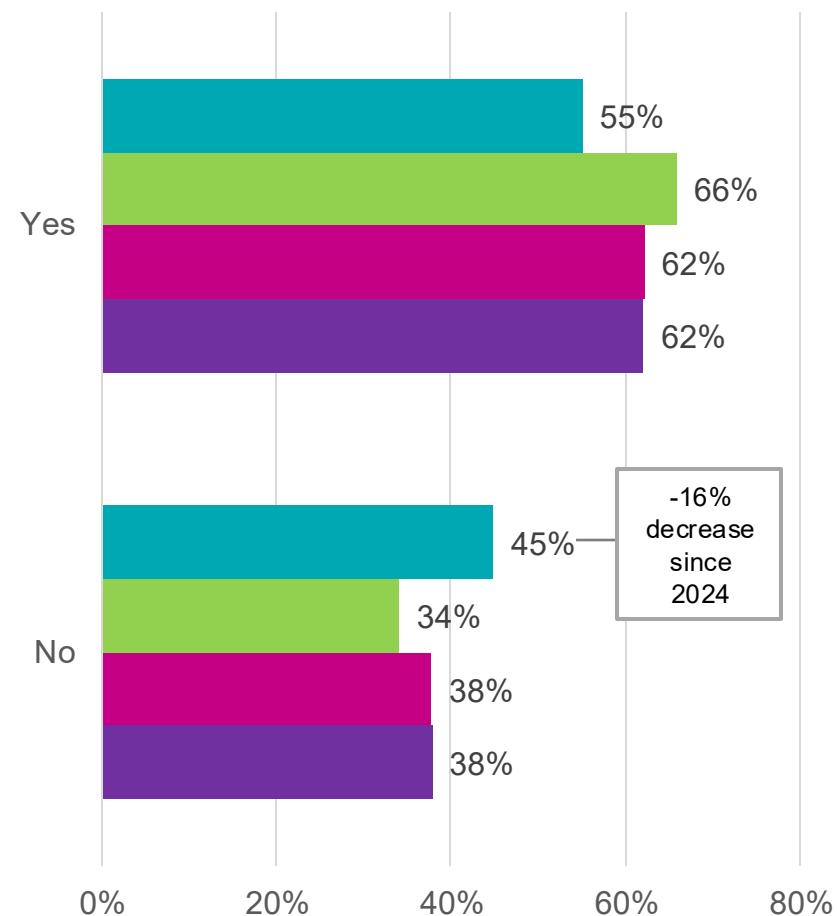
There was a 16% loss year over year in those who report that their children use Roblox despite 8% more adults saying they use Roblox.

75

Adults that use Roblox



Have kids that use Roblox

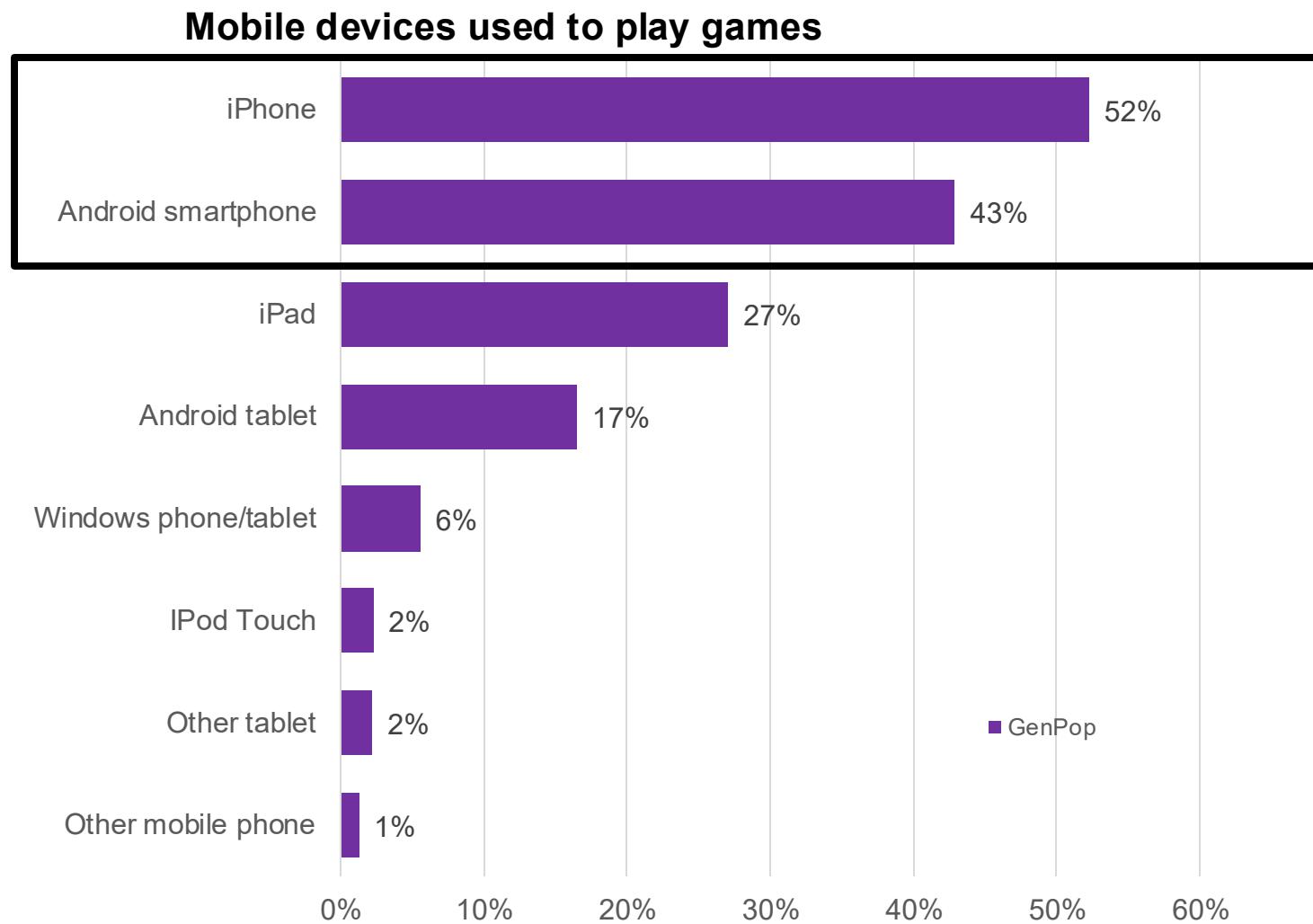


q109be: Do you play on Roblox yourself? (N=2,000) q109bg: Do your kids play on Roblox? (Among those with children in the household; N=565; Those who said "not sure" n=21)

Mobile Gaming

The general population is most likely to use smartphones compared to any other of connected mobile device. No changes compared to 2024.

77

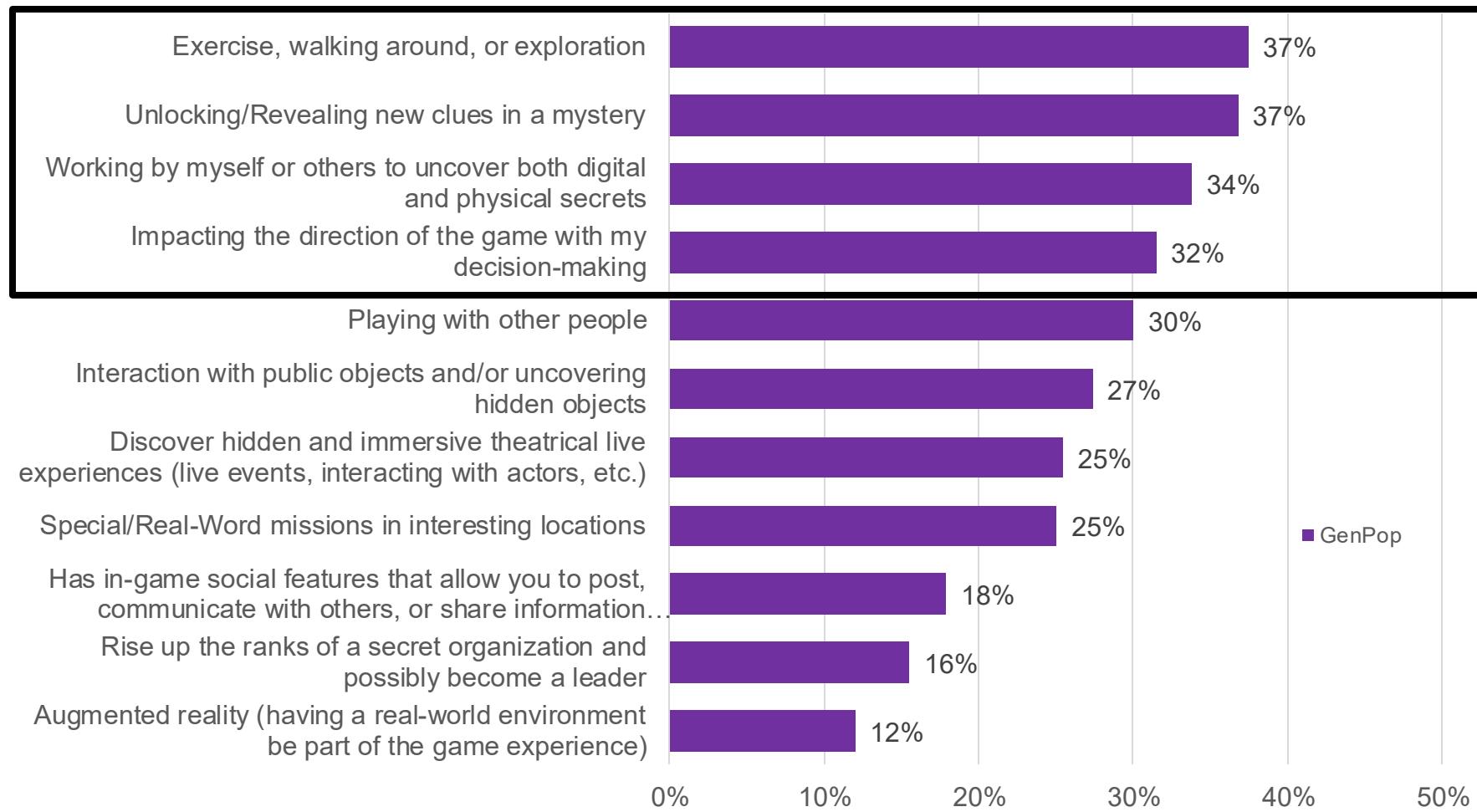


q112: Which of the following mobile devices do you personally use to play games? (Among those who play games on mobile devices; N=1,466; multiple response)

Exercise, unlocking mysteries, uncovering secrets, and decision-making are the top features most wanted by mobile gamers. These are the same top 4 features from 2024.

78

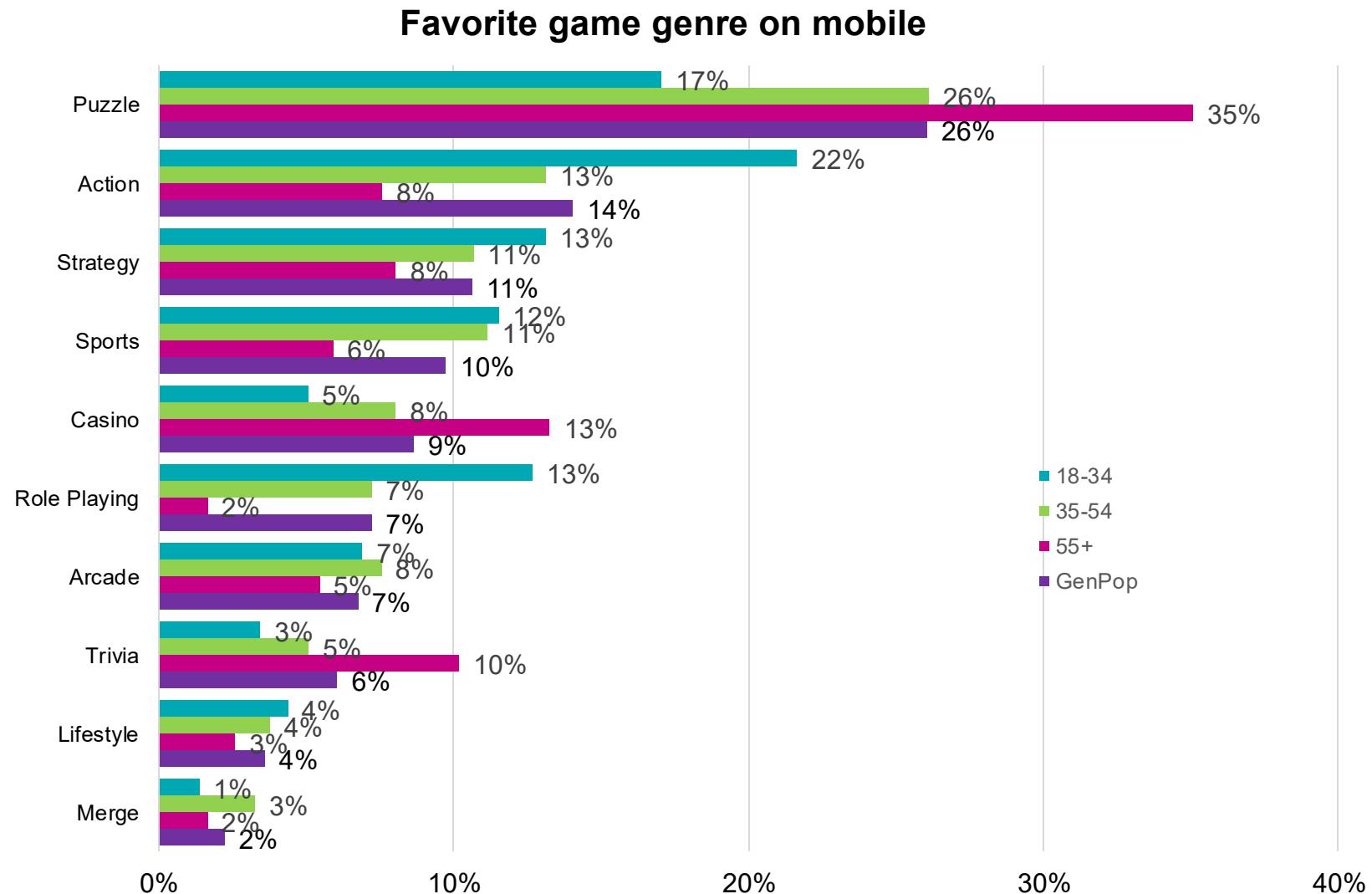
Features most wanted in a game or entertainment app



q176r: Please select the three features you most want in a mobile game or a digital entertainment app. (Among those who play games on any platform N=1,511; Three responses required)

Puzzle games, action, strategy, and sports remain the top categories for mobile game genres.

79

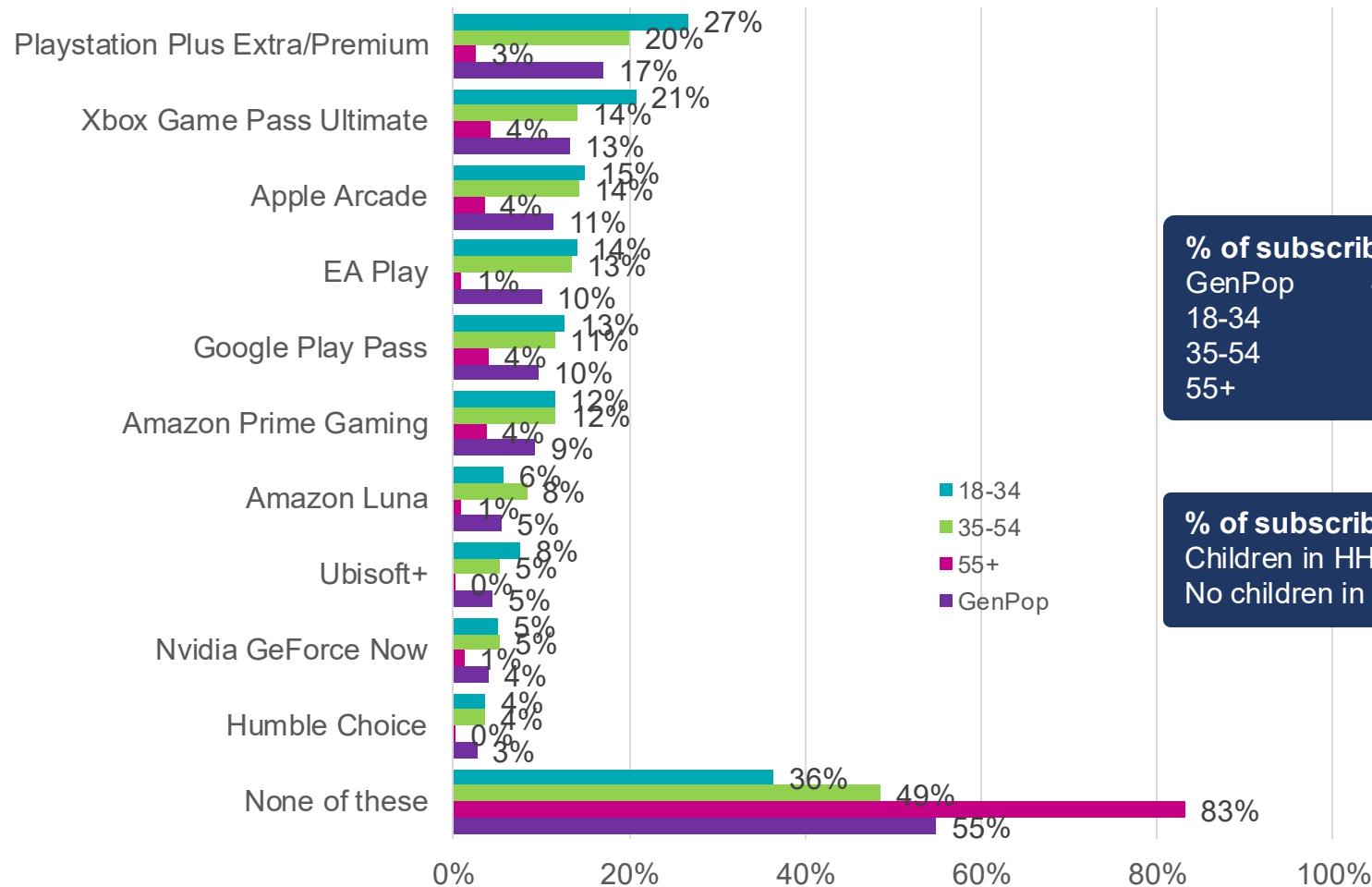


q116aa: What is your favorite genre or type of game to play on mobile? (Among those who play mobile games; N=1,466; multiple response)

45% of mobile gamers have current game subscriptions driven by those under 55.
PlayStation and Xbox, have the largest market shares of subscribers.

80

Game subscriptions current subscribed to



% of subscribers by age:

GenPop	45%
18-34	64%
35-54	51%
55+	17%

% of subscribers by child in HH:

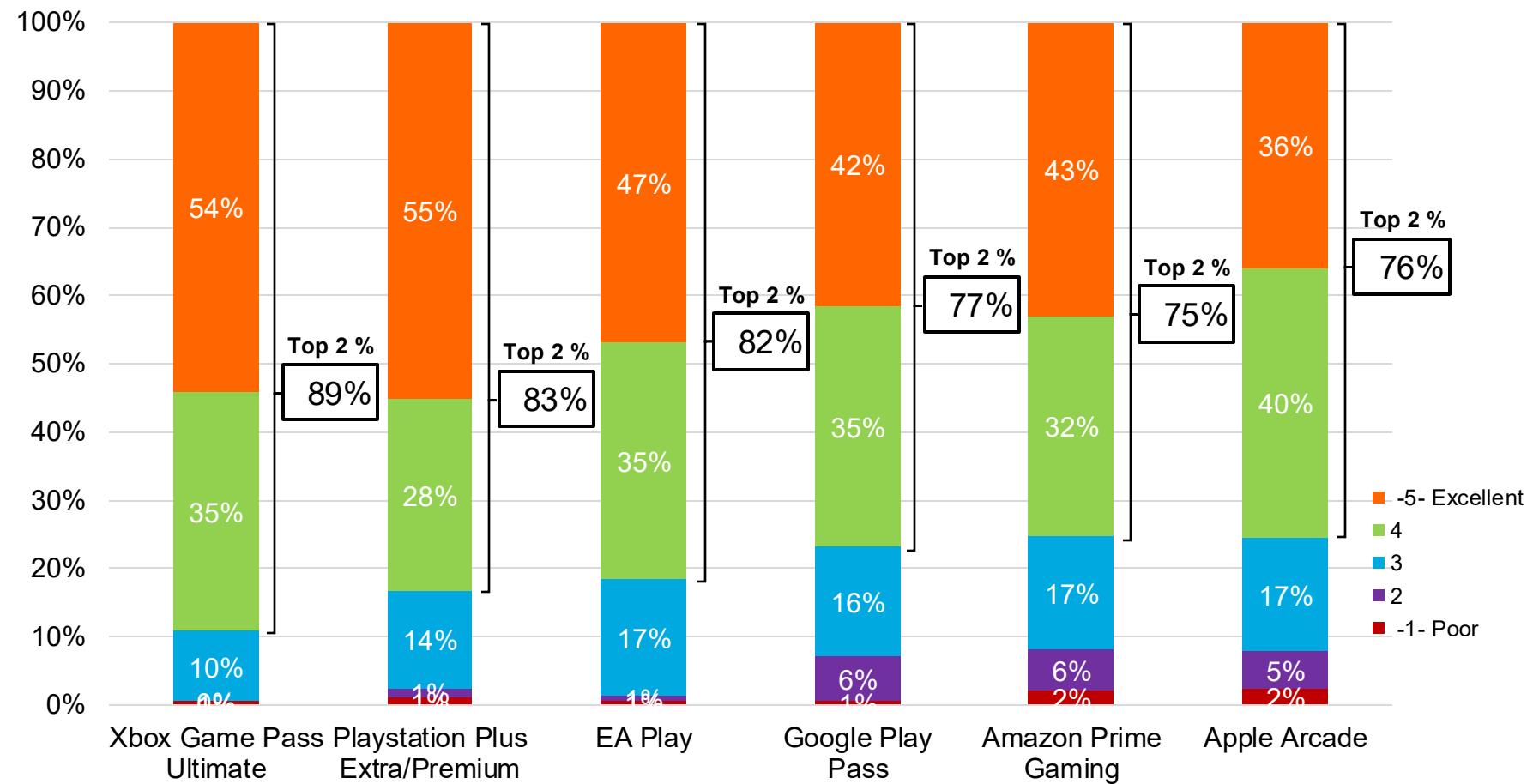
Children in HH	30%
No children in HH	10%

q116ab: Which of the following game subscriptions do you currently subscribe to? (Among those who play mobile games N=1,466)

Xbox Game Pass, PlayStation Plus, and EA Play have 80%+ satisfaction rates among their subscribers. Over half of Game Pass and Plus subscribers give top ratings.

81

Overall experience with top 6 gaming subscriptions

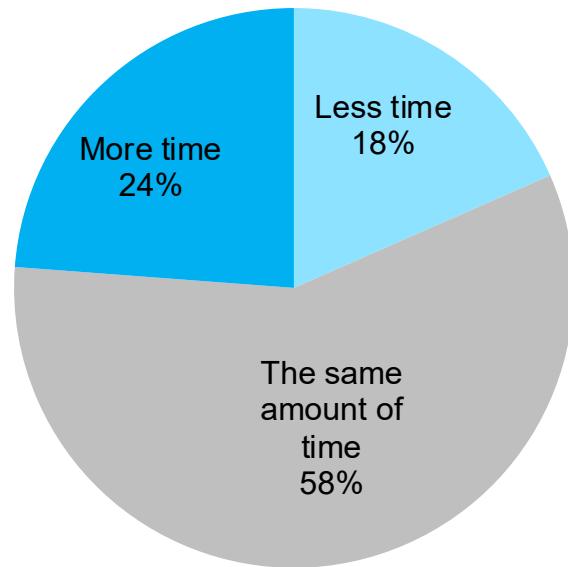


q116ac: How would you rate your overall experience with the game subscriptions you currently subscribe to? (Among those who subscribe to each.)

One quarter of Americans say they are playing more mobile games compared to a year ago. 31% of those 18 to 34 are spending more time compared to one year ago.

82

Time spent playing mobile games compared to a year ago



More time by age

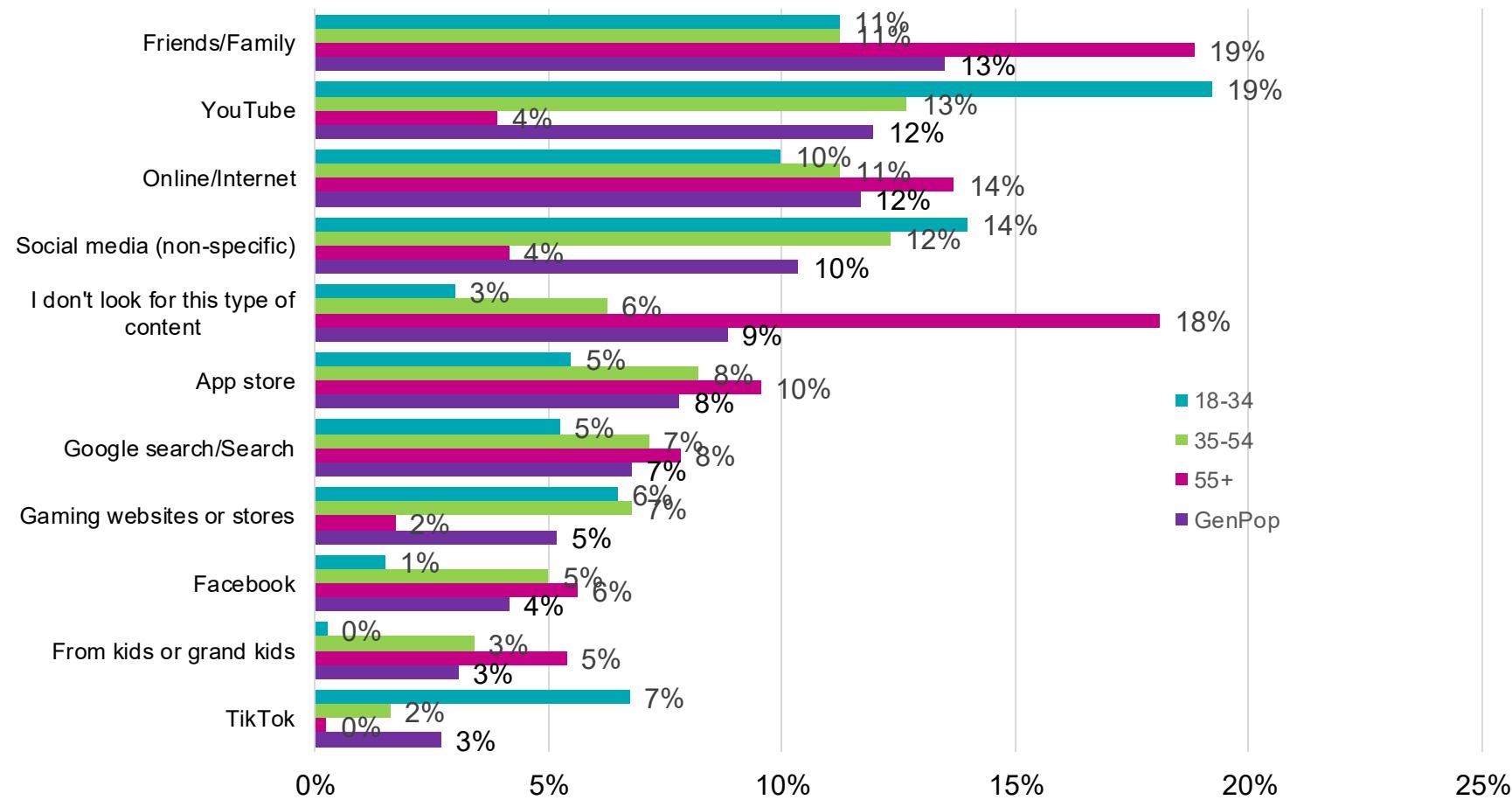
GenPop	24%
18-34	31%
35-54	26%
55+	14%

q111f: Are you spending more, less, or the same amount of time playing mobile games compared to a year ago? (Among those who play mobile game N=1,466)

Mobile gamers are most likely to hear about new games from friends and family members driven by those 55+. YouTube and social media are the next most popular channels mentioned. 9% of mobile gamers do not look for new game content.

83

Channels for game discovery



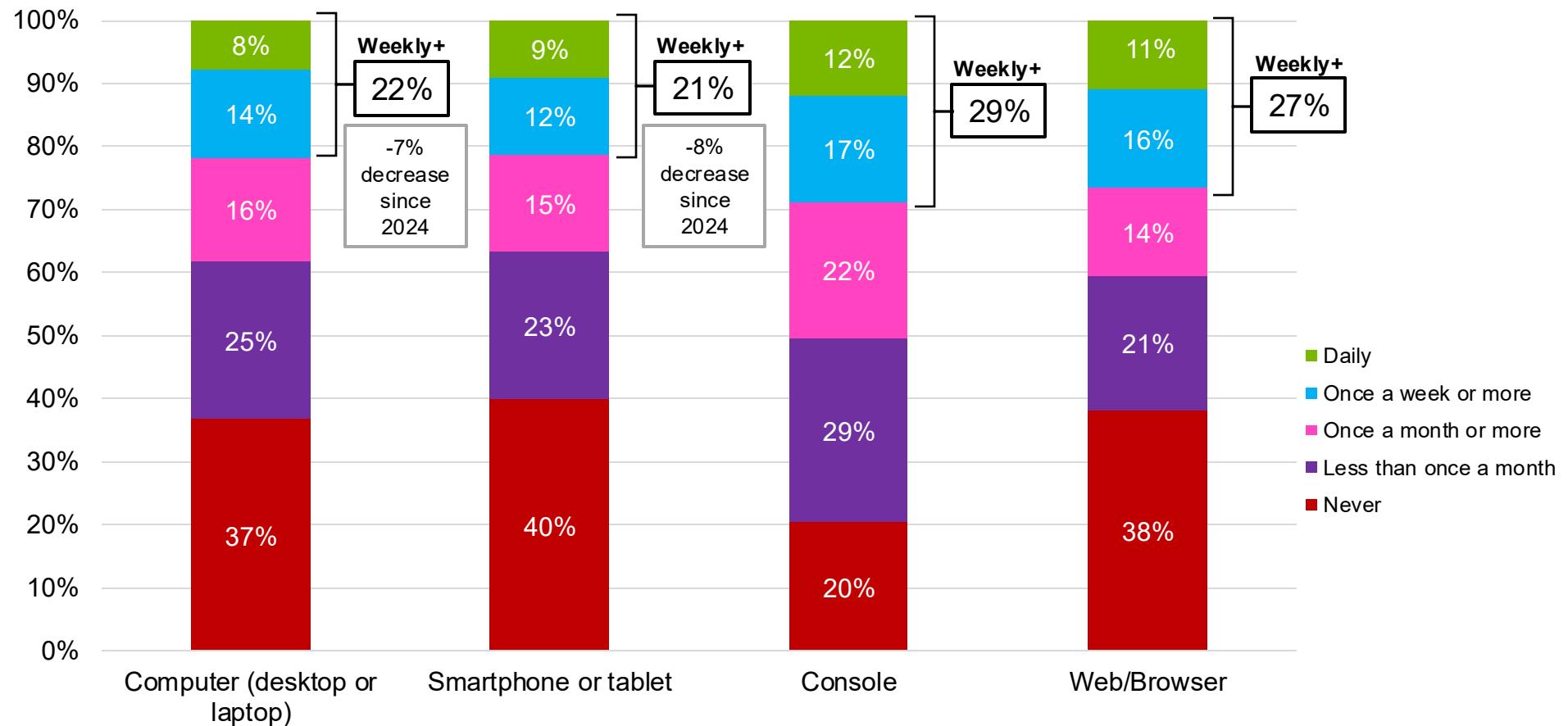
Q11h: Where do you go to learn about new games or get updates on games? (Among those who play mobile games N=1,371; multiple response; open-end)

Virtual Goods & In-App Purchases

There was a 7% and 8% decrease in those who report making weekly+ digital purchases in computer and mobile devices compared to 2024. Consoles have the highest proportion of weekly+ spenders.

85

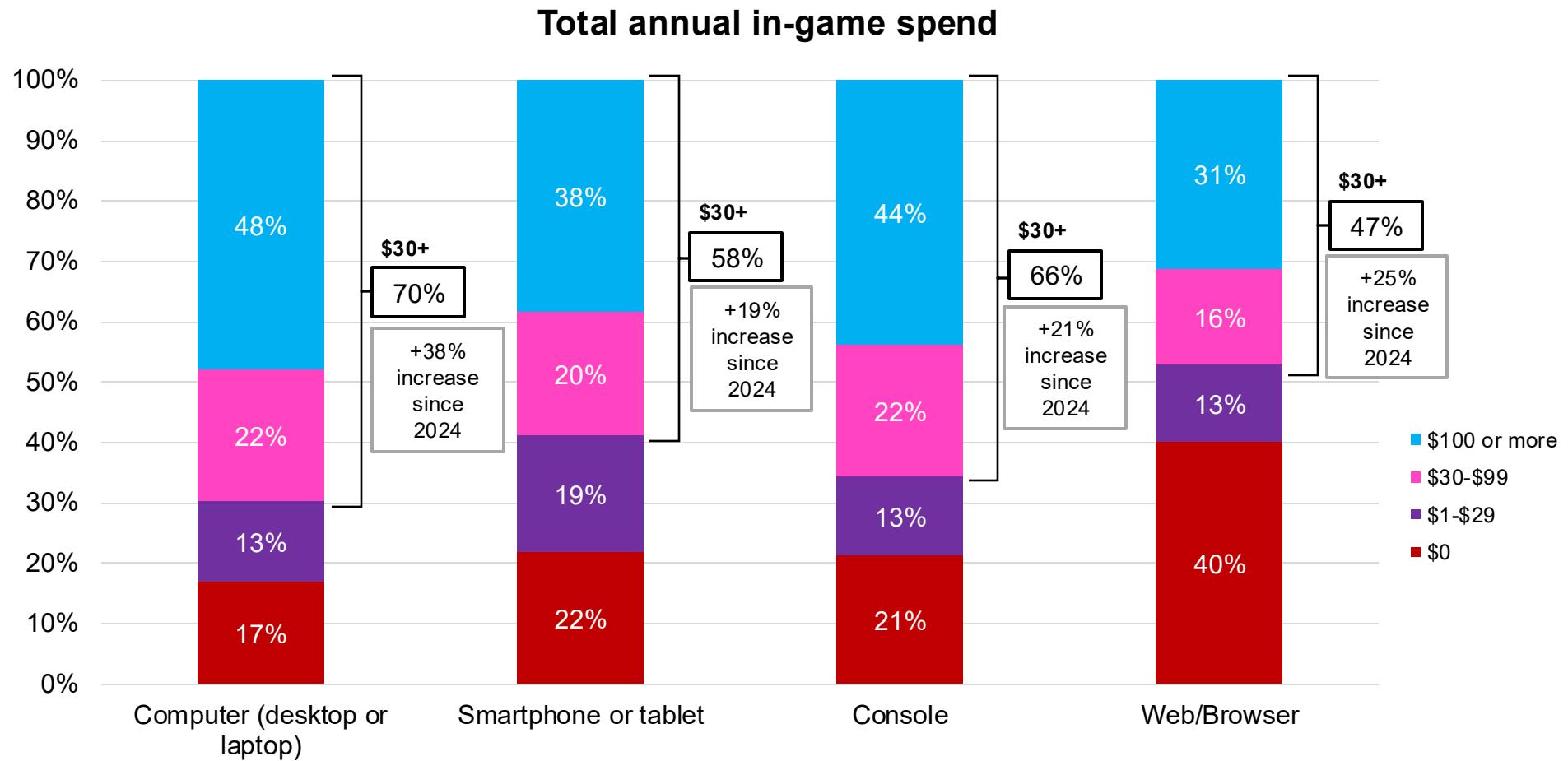
Frequency of making digital/virtual goods purchases in games



q120a: How often do you purchase virtual/digital goods for the following types of gaming systems? (Among those who play games on each platform; Computer N=1,135; Mobile N=1,466; Console N=942; Web games N=958)

Total annual in game spend has jumped dramatically higher compared to 2022.

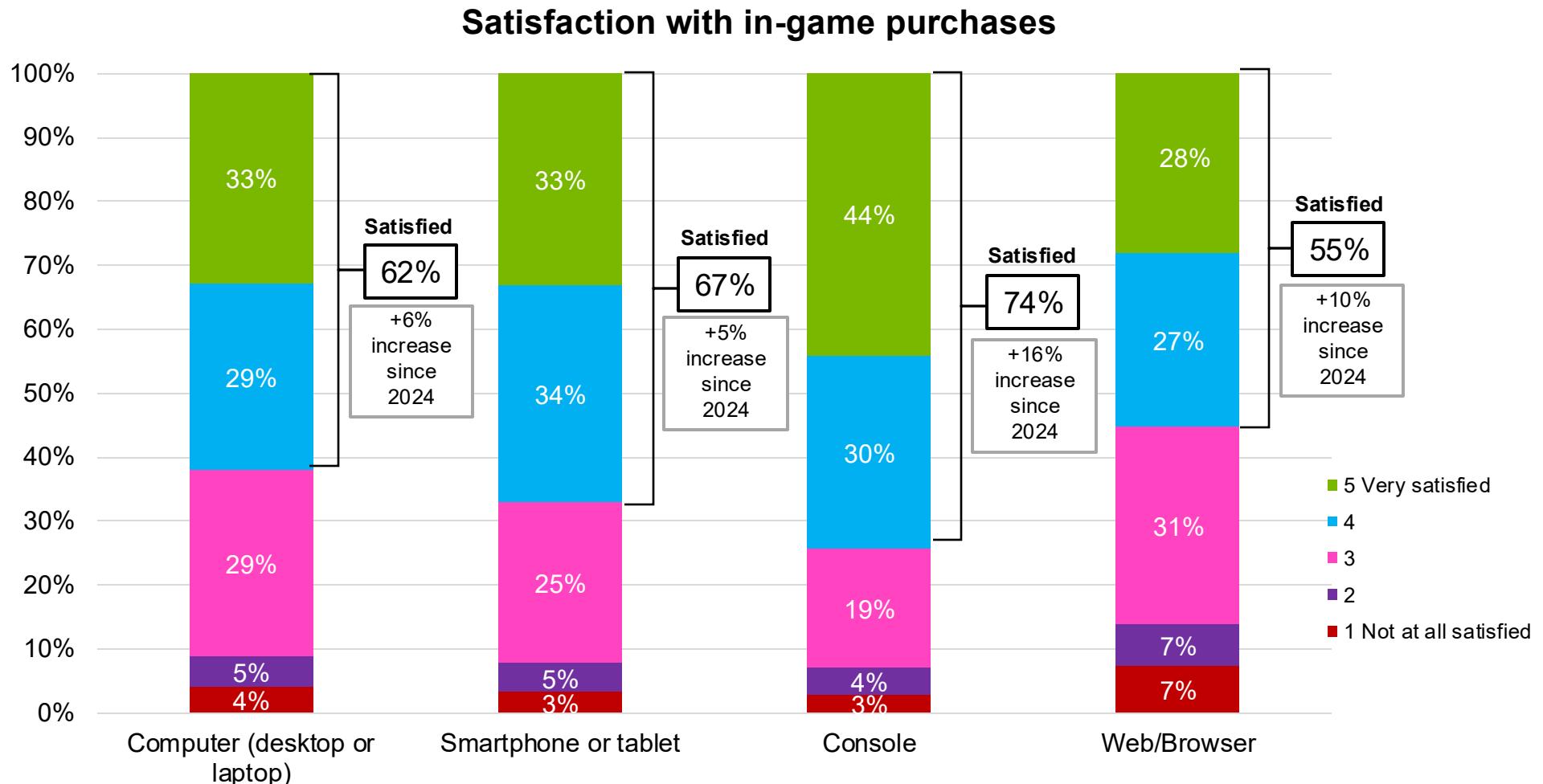
86



q111: In the last 12 months, how much did you spend in total on in-game/app purchases in games on the following? (Among those who make purchases on each platform; Computer N=839; Mobile N=939; Console N=786; Web games N=744; Those who said "Not sure" not included in base)

Satisfaction ratings of in game purchases rose significantly in all device categories compared to 2024. Satisfaction I greatest among console users.

87

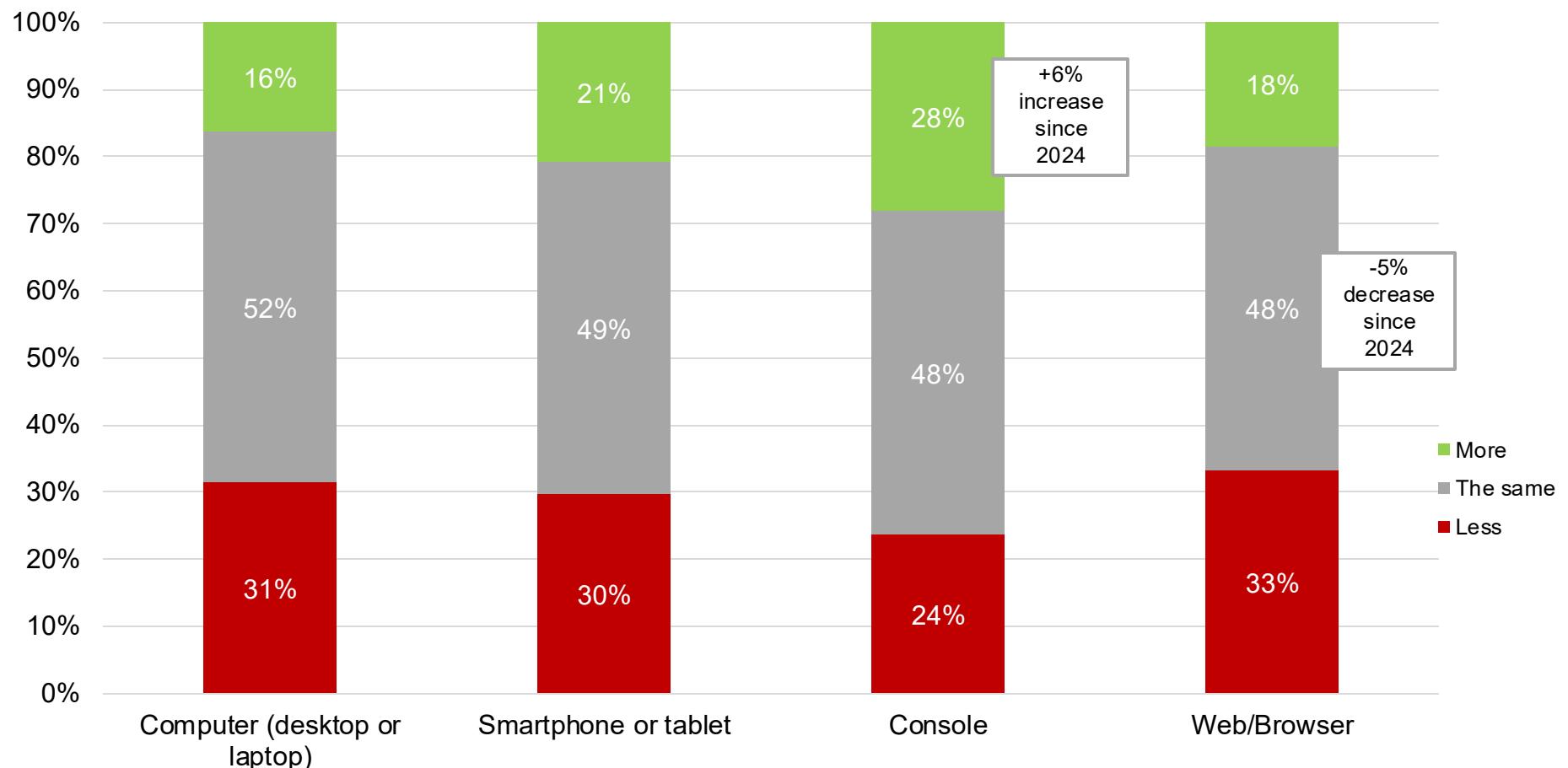


q142: How satisfied are you overall with the virtual/digital goods you bought in the following types of games? (Among those who make purchases on each platform; Computer N=870; Mobile N=974; Console N=813; Web games N=765)

Half plan to keep their in game spending the same within the next year. Console gamers saw a 6% increase in those who plan to spend more compared to 2024.

88

Purchase volume of virtual/digital goods within the next year

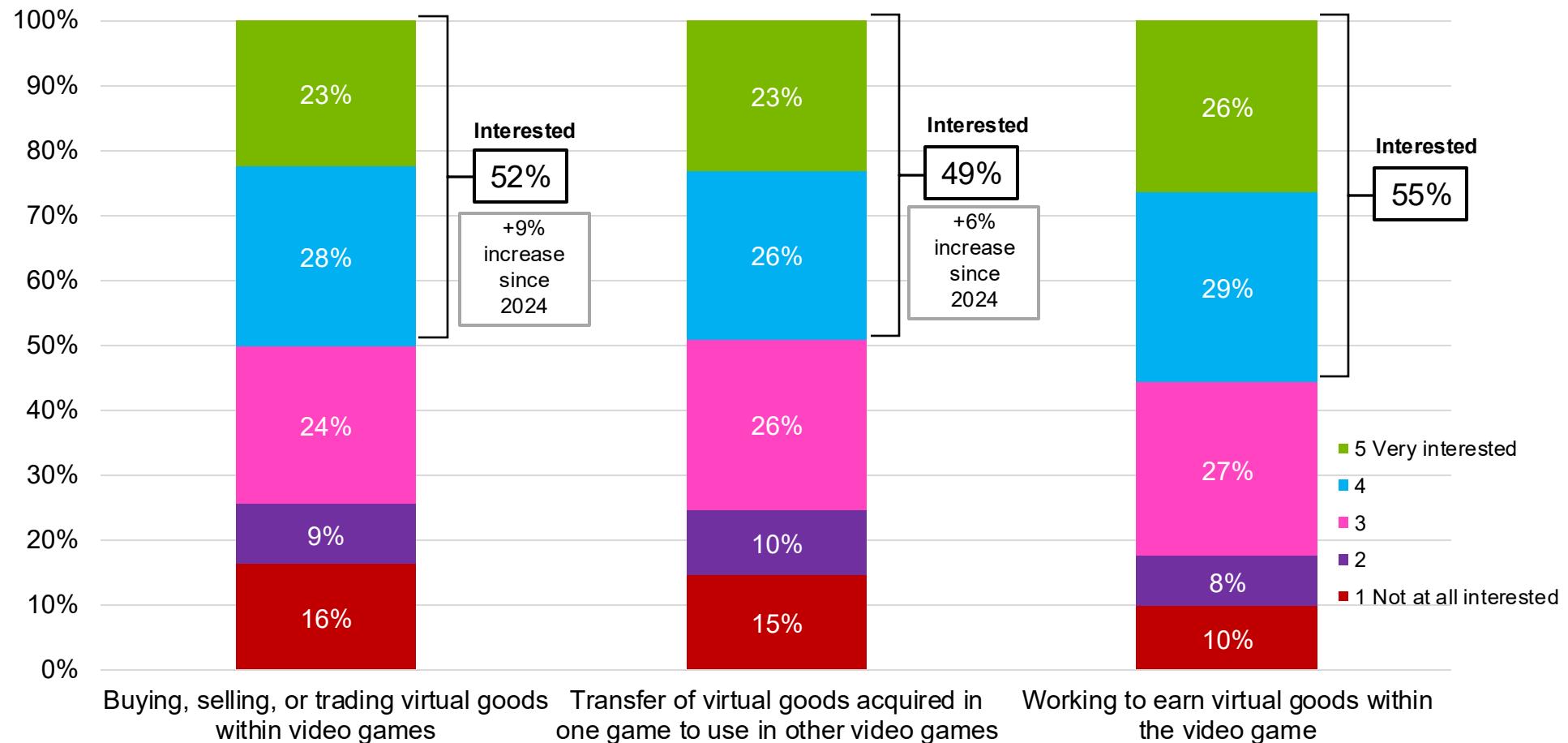


q143: Do you intend to buy more, less, or the same amount of virtual/digital goods in the following types of games in the next year?
(Among those who make purchases on each platform; Computer N=870; Mobile N=974; Console N=813; Web games N=765)

Interest is strongest in working to earn virtual goods within video games though interest in buying and selling or the transfer of virtual goods increased significantly within the last year.

89

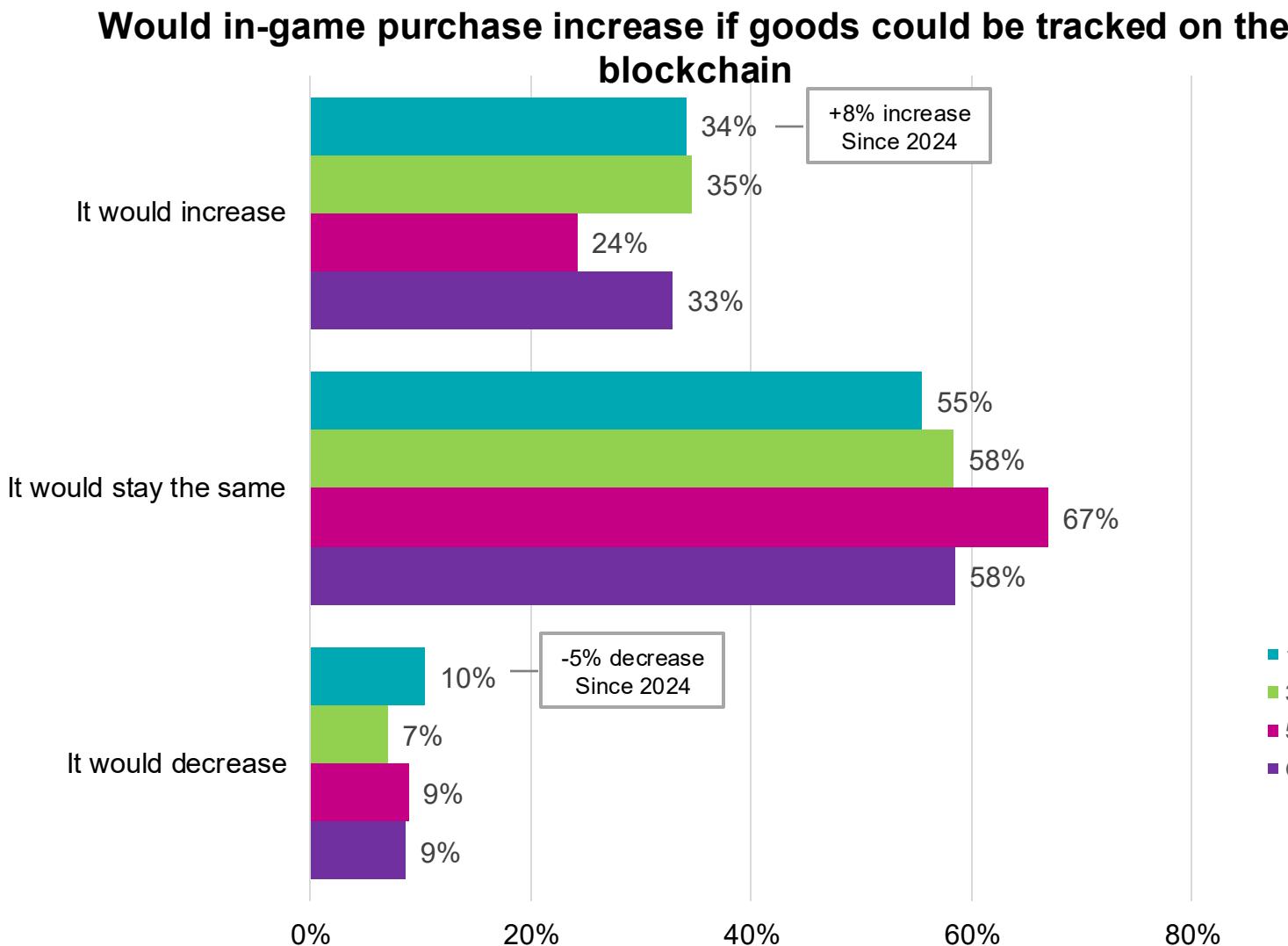
Interest ratings in virtual goods ownership options



q143a: How would you rate your interest in the following? (Among those who make purchases on any platform N=1,031)

A third of those who have made purchases on any platform would increase in game purchases if good could be tracked on the block chain.

90



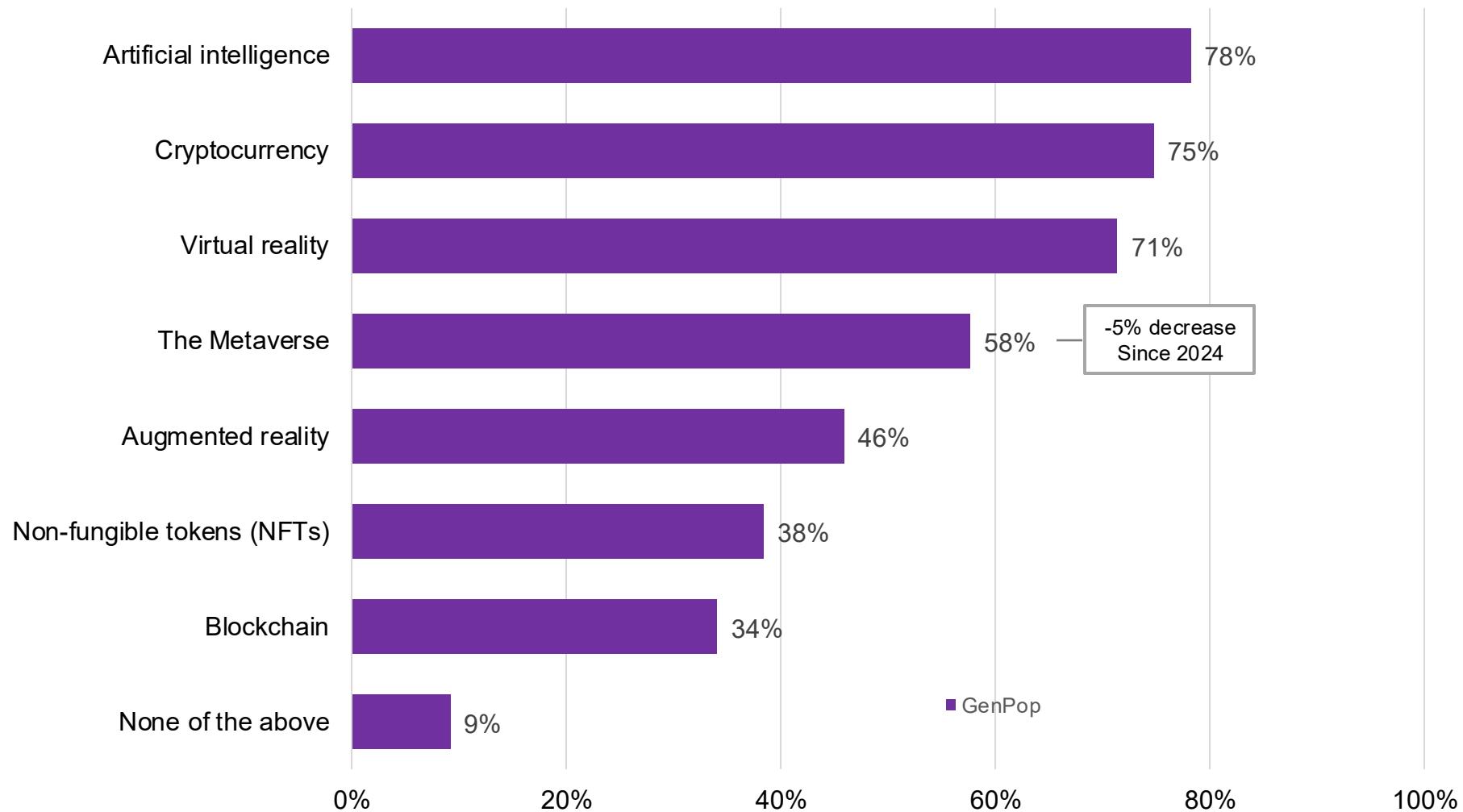
q143aaa: How would your interest in acquiring virtual goods within games increase if you could track the purchase, sale, or trade of your virtual goods on the blockchain? (Among those who make purchases on any platform; N=879; Those who said "I'm not familiar enough with blockchain to answer" n=152)

Technology

Concepts were mostly the same as in 2024 with the exception of The Metaverse which saw a 5% decrease in awareness.

92

Concept awareness



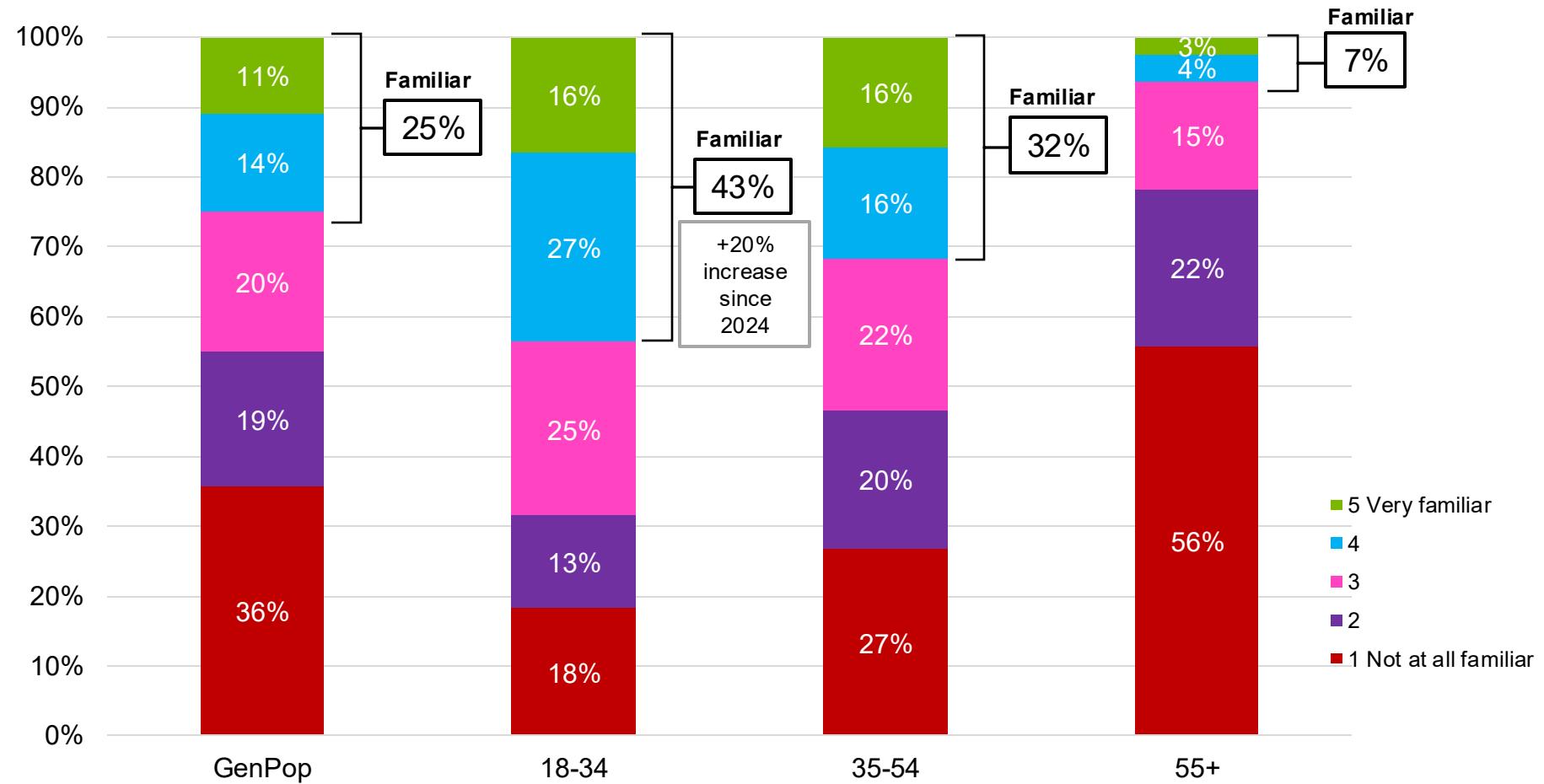
q172: Have you heard of the following terms or concepts before? (N=2,000)

Metaverse

One-Quarter in the U.S. are familiar with the term metaverse. Familiarity has increased sharply among those 18 to 34 compared to 2024, while those 35 and older have not become any more familiar than a year ago.

94

Familiarity with the term “metaverse”

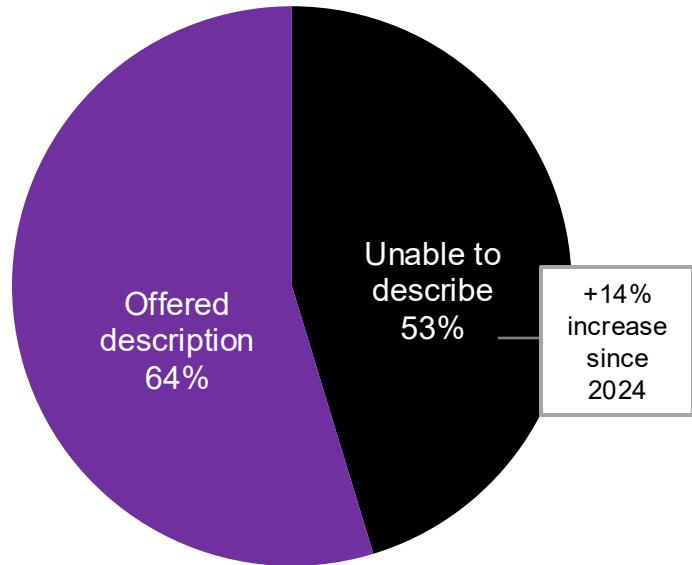


q225e: How would you rate your level of familiarity with the word “Metaverse” in the context of gaming, digital content or digital entertainment? (N=2,000)

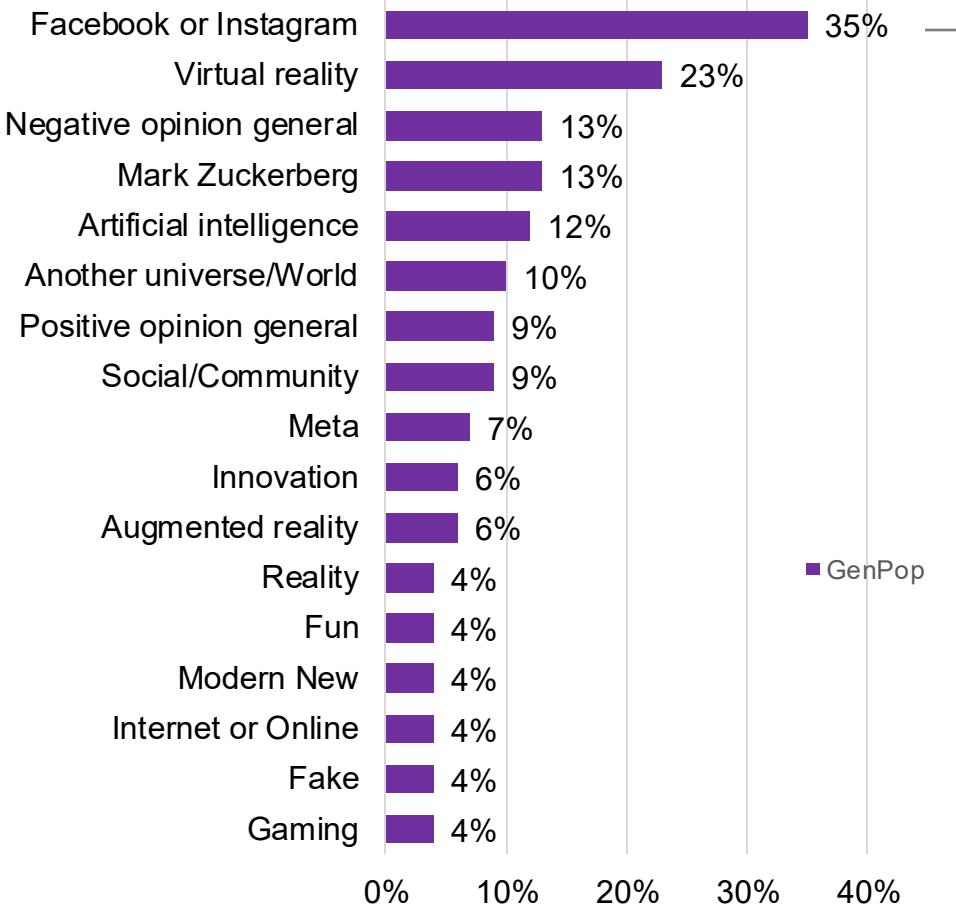
Facebook and virtual reality are the most likely thoughts that come to mind when people hear the word “Metaverse.”

95

Unable to offer top of mind regarding metaverse



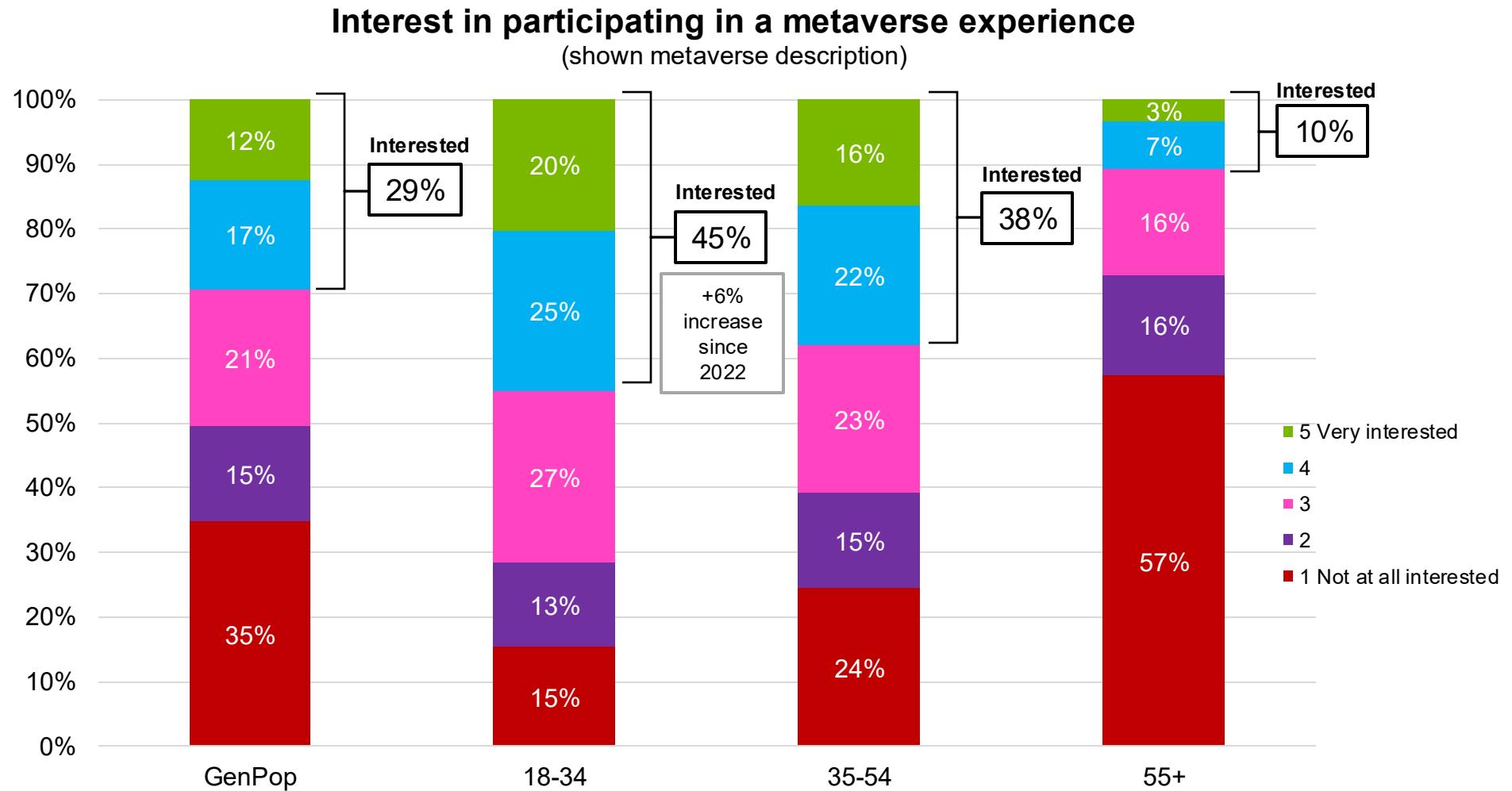
Top of mind when describing metaverse



q225d: When you hear the word “Metaverse,” what are the first three things that come to mind? (N=1305; Those who said “don’t know or no answer” n=695; 3 responses permitted)

25% are interested in participating in the metaverse. Those 18 to 34 are significantly more interested in a metaverse experience than they were in 2022. Interest is the same year over year for those over 34.

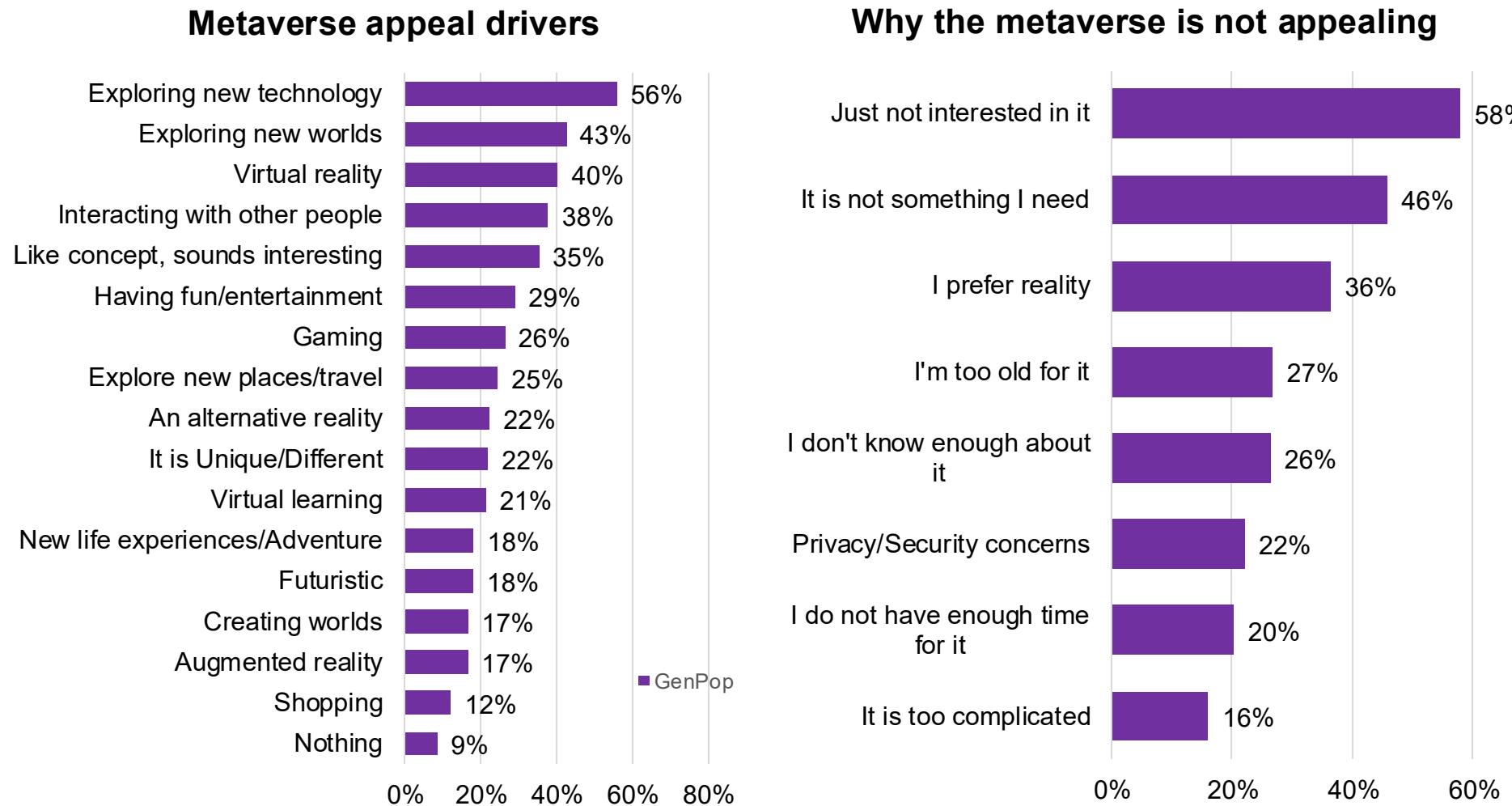
96



q225h: Based on this explanation of the metaverse what is your level of interest in participating in the metaverse or a metaverse-like experience? (N=2,000)

The exploration of a new technology is the greatest driver for those interested in a metaverse experience. Exploring new world and virtual reality are the other top appeal drivers. Barriers to metaverse appeal remain the same compared to 2024.

97



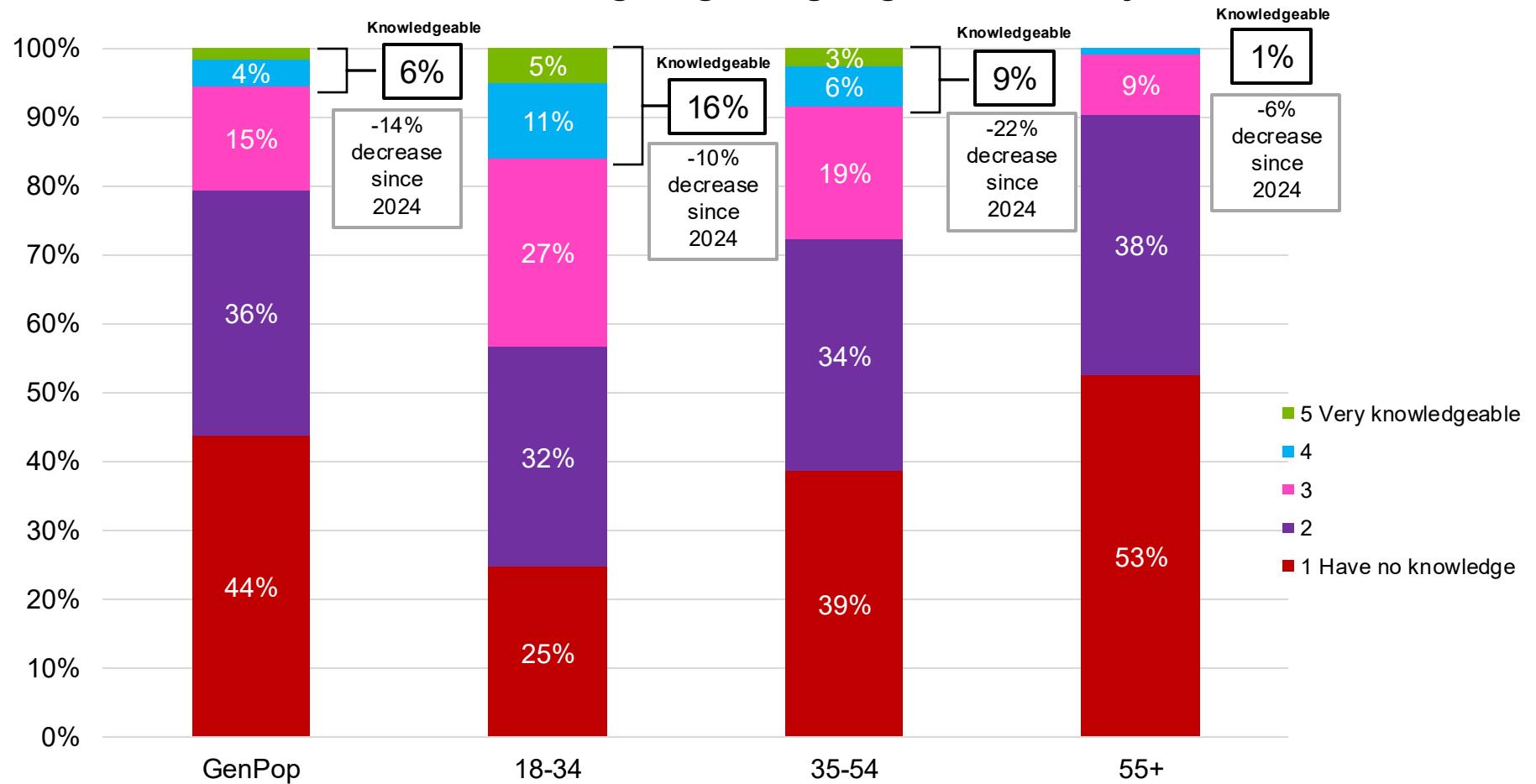
q225i: What appeals to you about the metaverse? (Among those who are interested in a metaverse experience N=1,010) q225k: Why are you not interested in the metaverse? (Among those who are NOT interested in a metaverse experience N=990)

Augmented Reality

Among those who have heard about augmented reality, significantly less say they have knowledge of it compared to 2024.

99

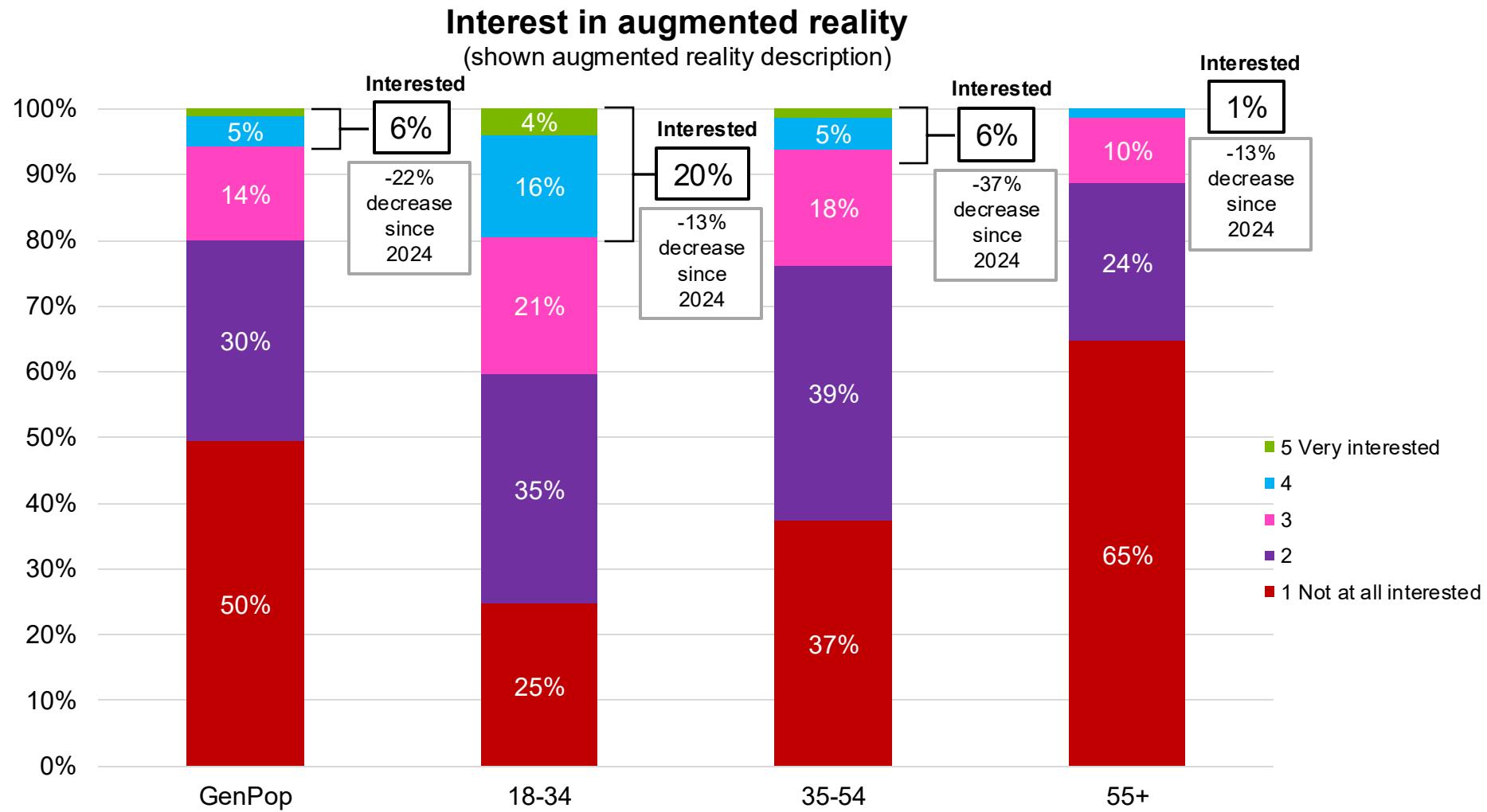
Level of knowledge regarding augmented reality



q176b: How would you rate your level of knowledge about augmented reality? (Among those who have heard of augmented reality N=506)

There were significant decreases in augmented reality interest across all age categories compared to 2024.

100

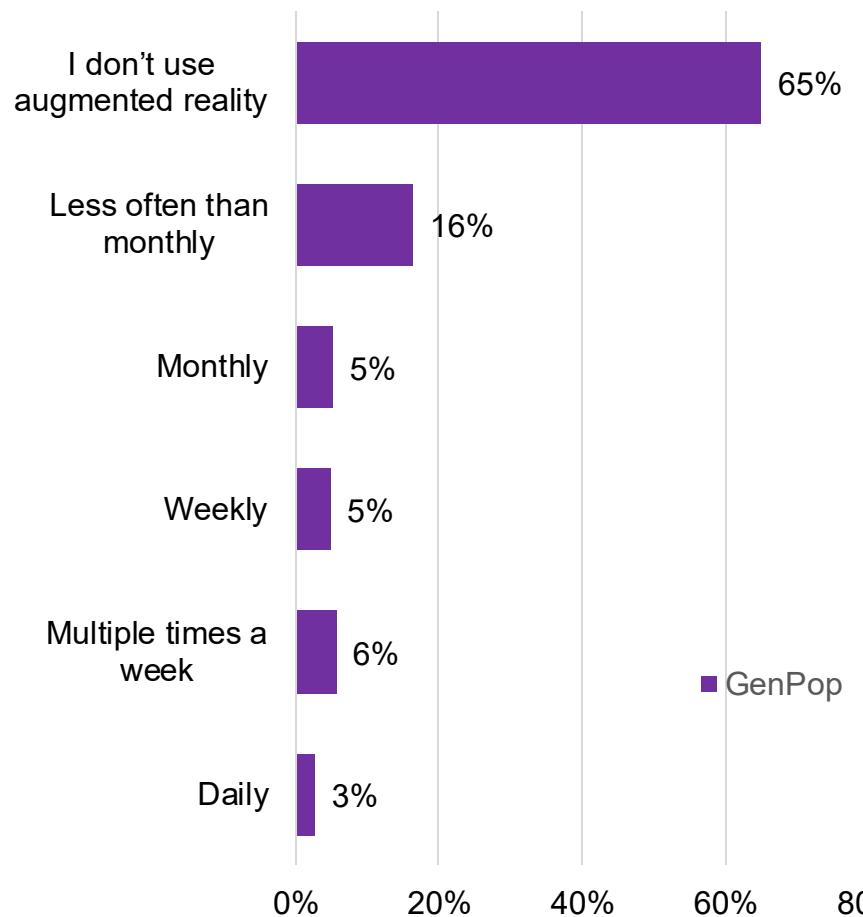


q176: How interested are you in augmented reality? (Among those who have heard of augmented reality N=470)

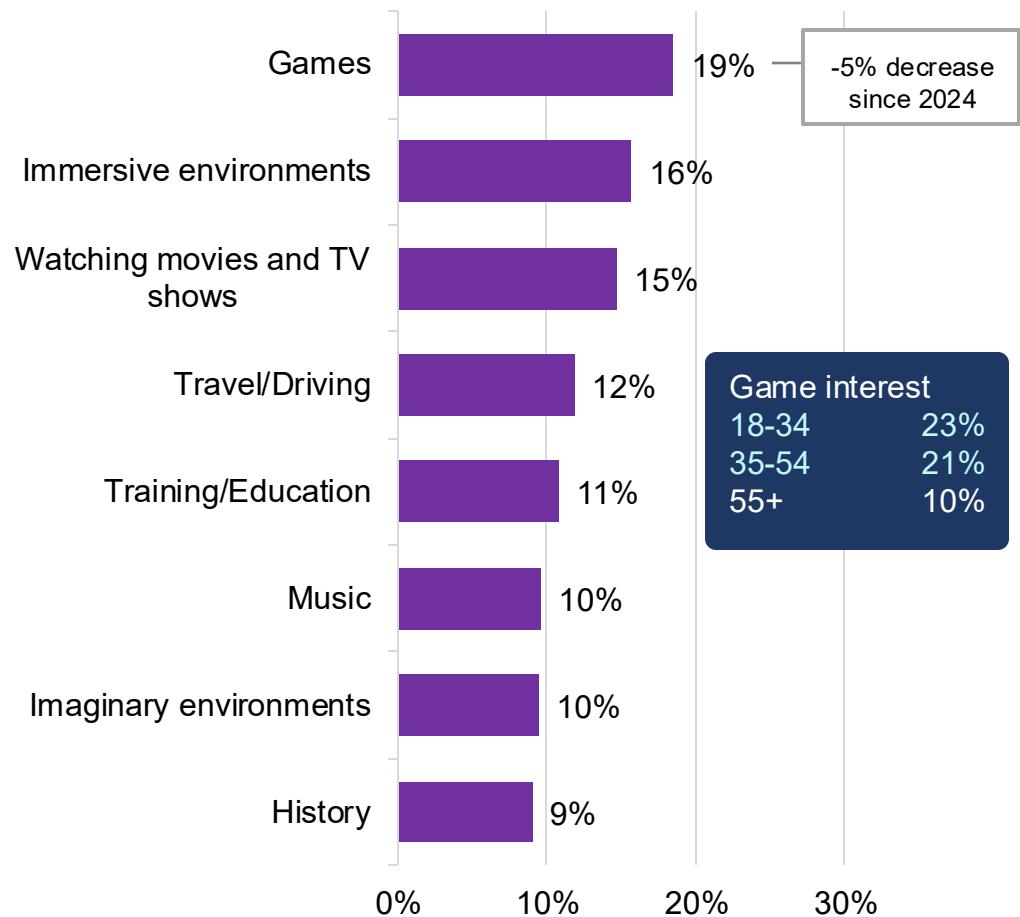
65% of those who have heard of augmented reality don't use it. Those interested in AR are most interested in using it for games, immersive environments, and watching movies and shows.

101

Frequency of augmented reality use



Augmented reality use interest

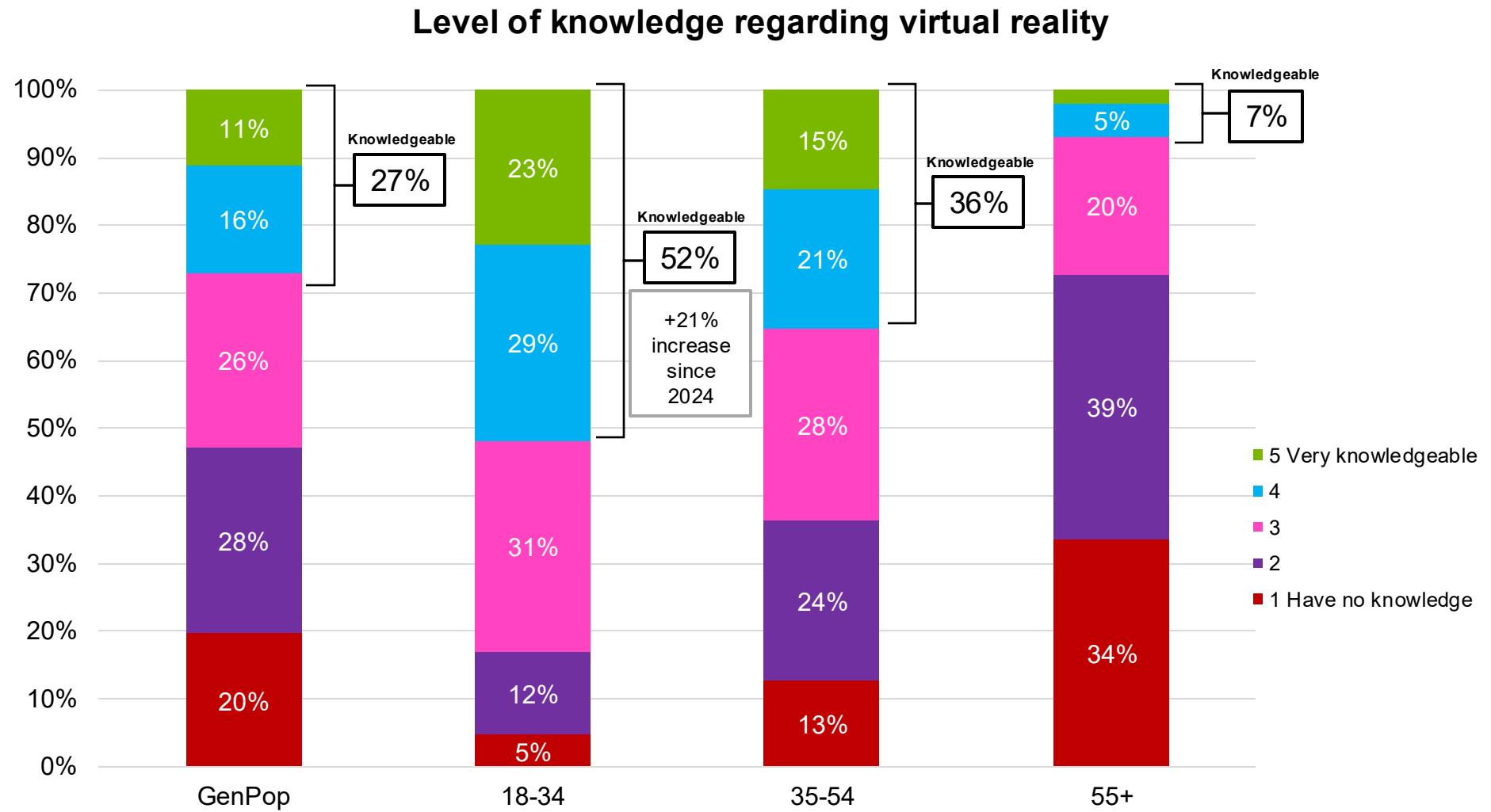


q176ba: How often do you use augmented reality? (Among those who have heard of augmented reality N=919) q176bb: Which of these areas most interests you for using augmented reality? (Among those who are interested in augmented reality N=673)

Virtual Reality

There was a slight increase year over year (2%) among the U.S. population driven by a substantial increase in those knowledgeable 18 to 34.

103

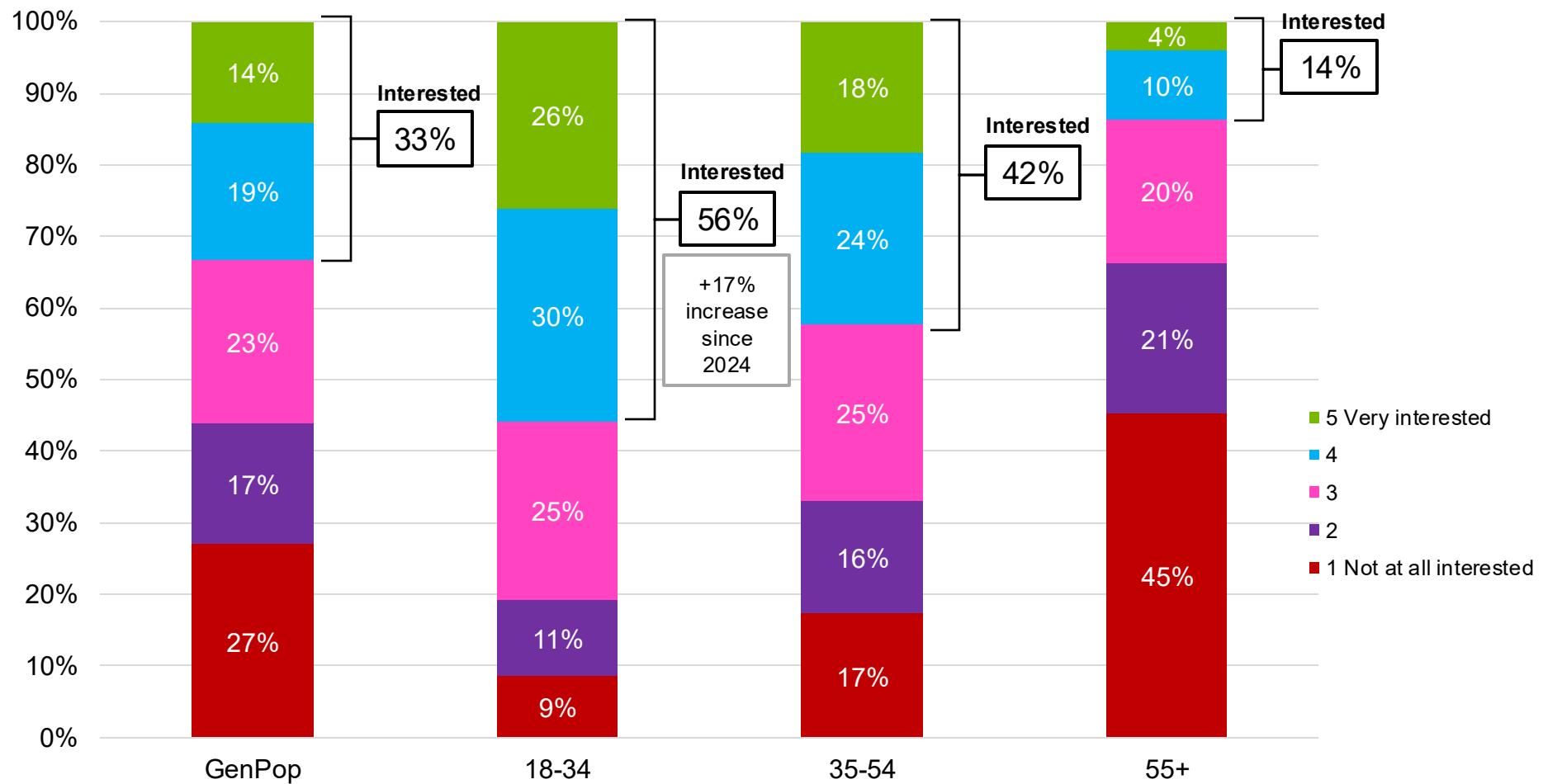


q175a: How would you rate your level of knowledge about virtual reality? (Among those who have heard of virtual reality N=1,429)

One-Third of those in the U.S. are interested in virtual reality. 17% more of those 18 to 34 are interested in virtual reality compared to last year.

104

Interest in virtual reality

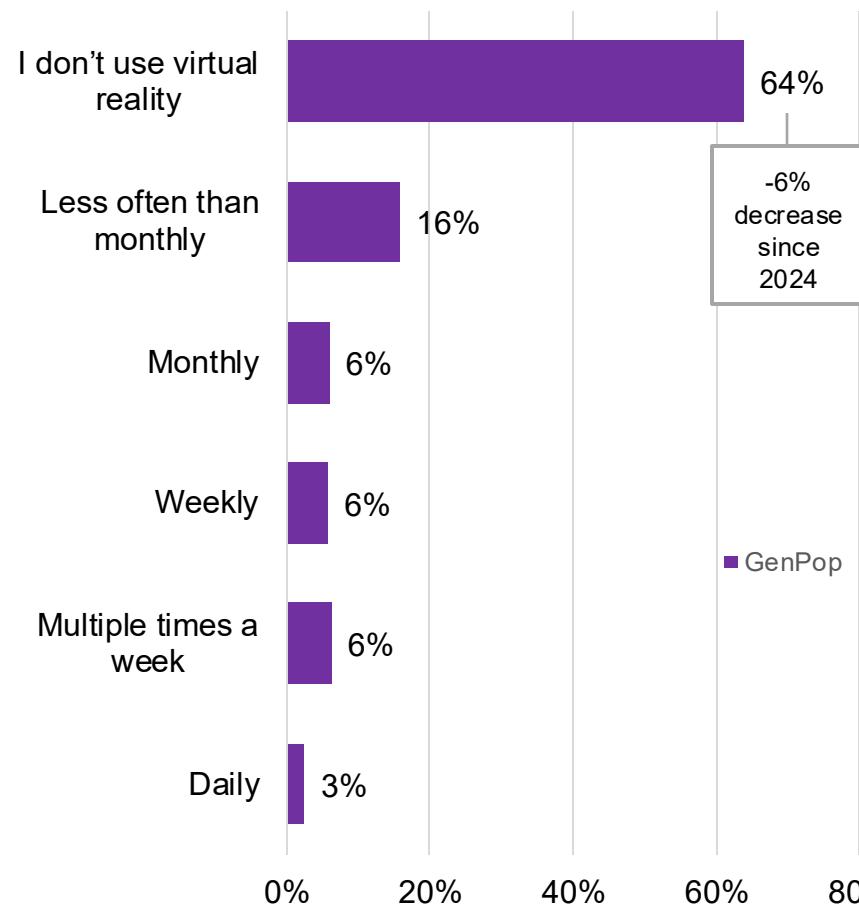


q175: How interested are you in virtual reality? (Among those who have heard of virtual reality N=1,429)

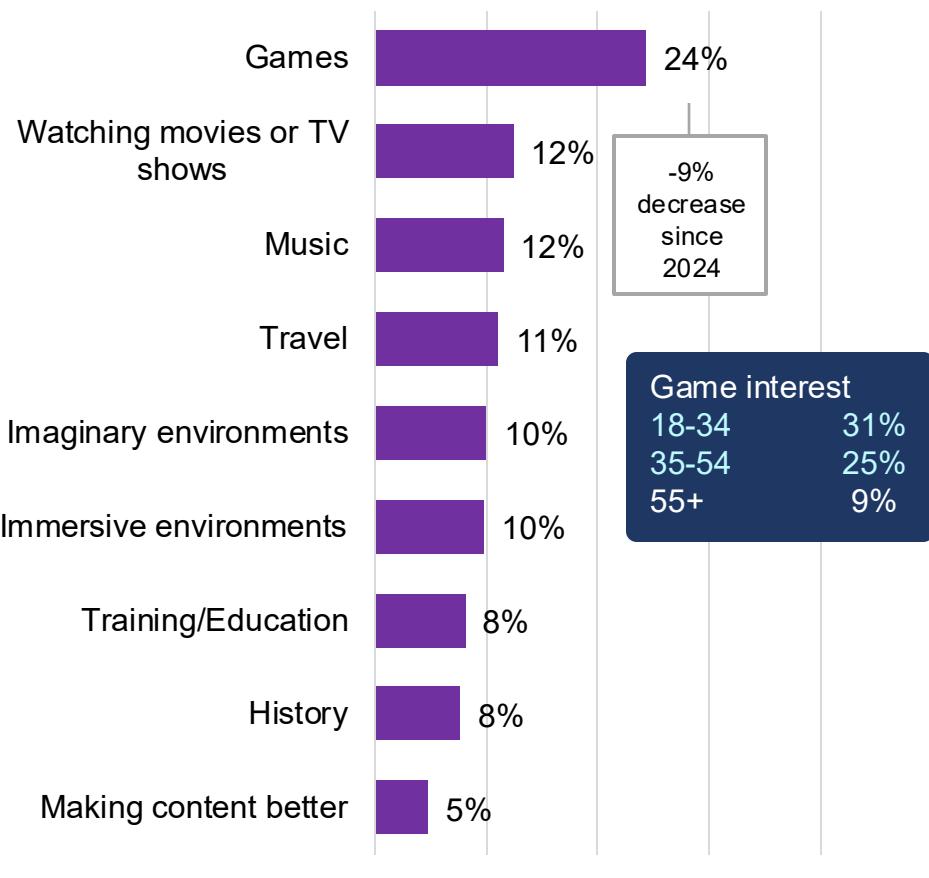
Those who have heard of virtual reality but do not use virtual reality is down 6% among the U.S. general population. Those who do use VR, are most interested in using it for gaming though there was a drop in this proportion year over year.

105

Frequency of virtual reality use



Virtual reality use interest



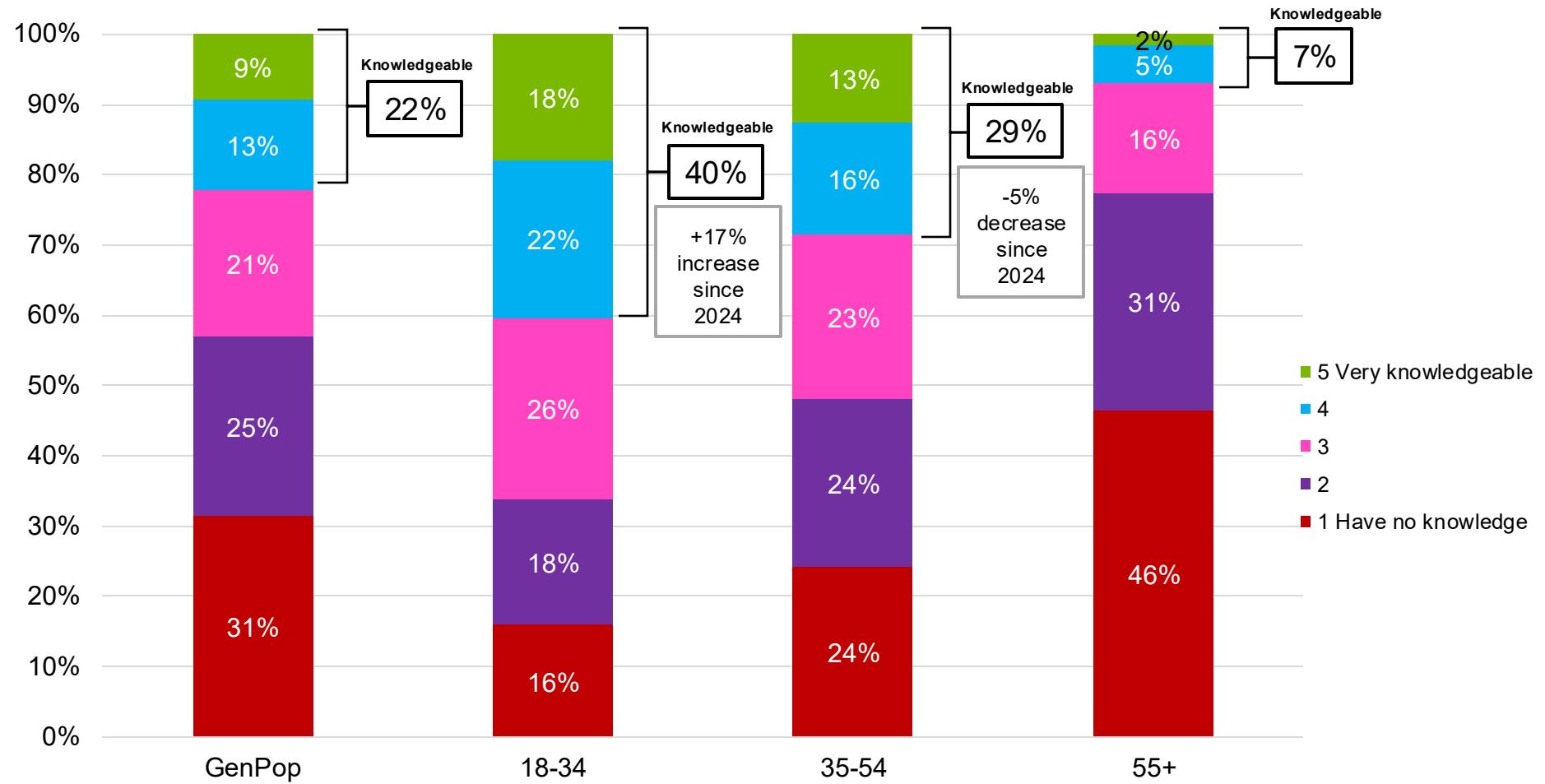
q175b: How often do you use virtual reality? (Among those who have heard of virtual reality N=1,429) q175c: Which of these areas most interests you for using virtual reality? (Among those who are using virtual reality N=764)

Cryptocurrency

Just 1 in 5 of those who are aware of cryptocurrency claim to have knowledge of it. Those under 35 are more likely than they were in 2024 to report having knowledge of cryptocurrency.

107

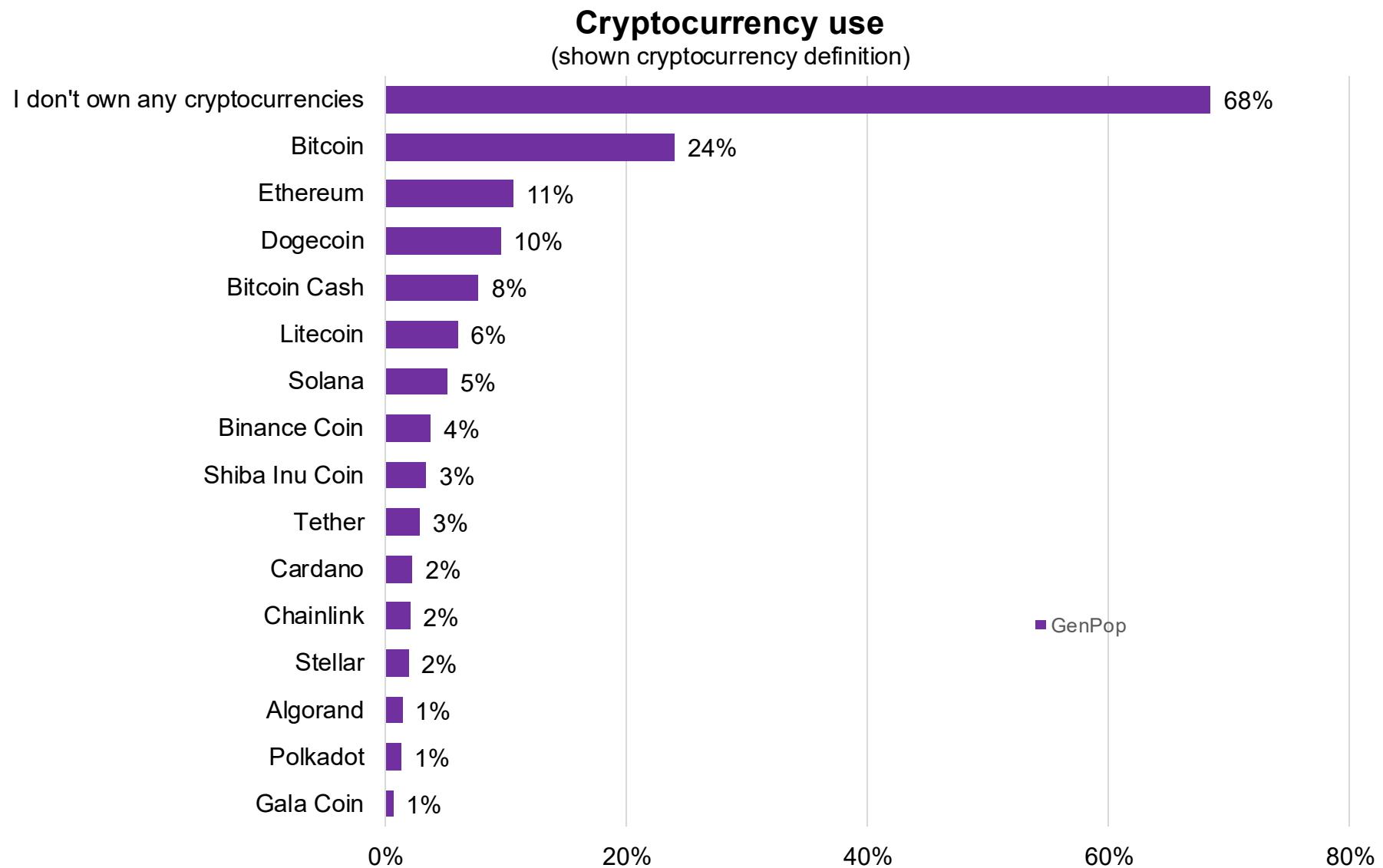
Level of knowledge regarding cryptocurrency



q173f: How would you rate your level of knowledge about crypto currency? (Among those who have heard of virtual reality N=1,496)

68% of those who are aware of cryptocurrency do not own or use it. There were no significant changes in the percentages for any of these cryptocurrency uses.

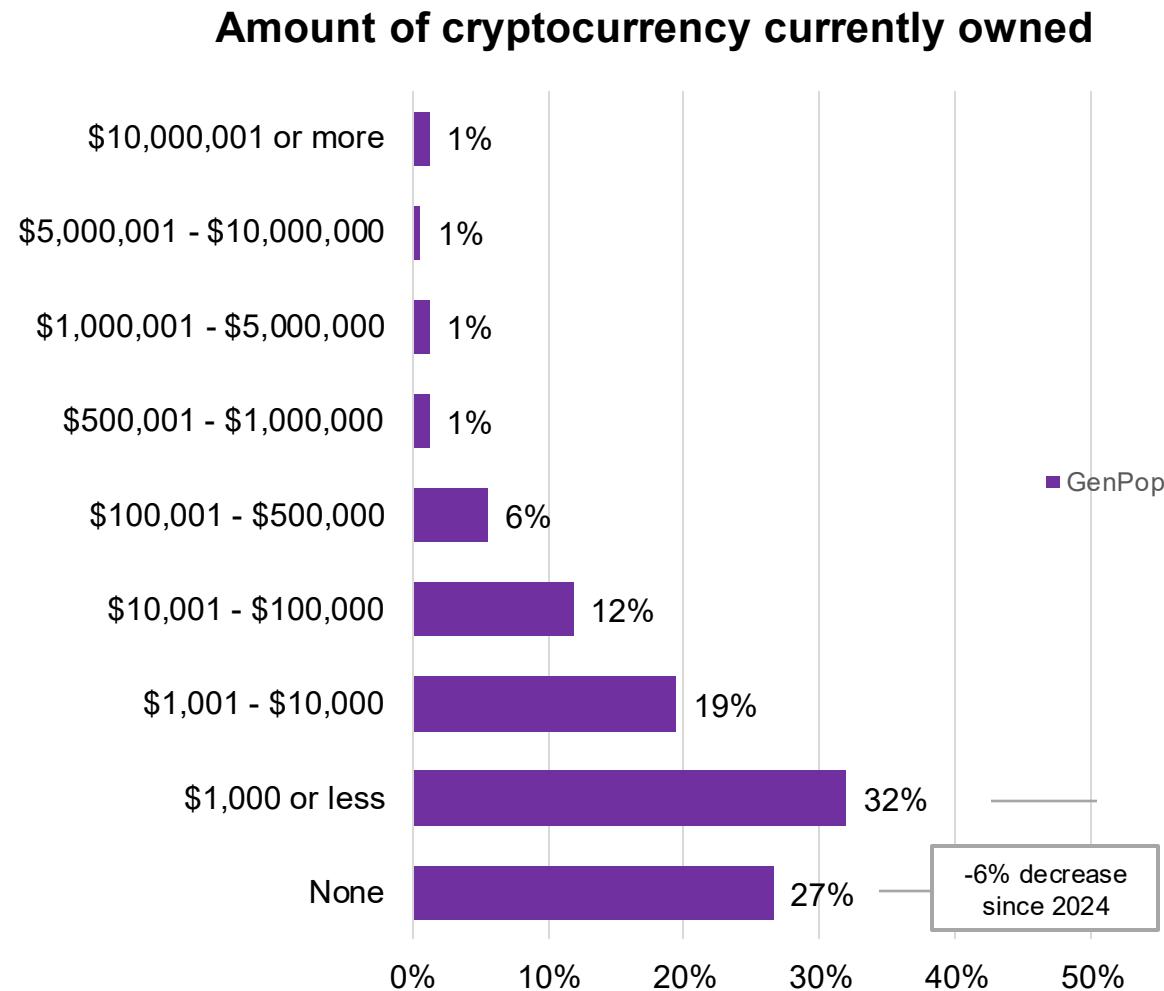
108



q173: Do you currently, or have you ever owned/used any of the following cryptocurrencies or cryptocurrency services? (Among those who have heard of cryptocurrency N=1,495; multiple response)

Just over a quarter say they do not own any cryptocurrency. This is a 6% decrease compared to 2024 but there is no change compared to 2022.

109

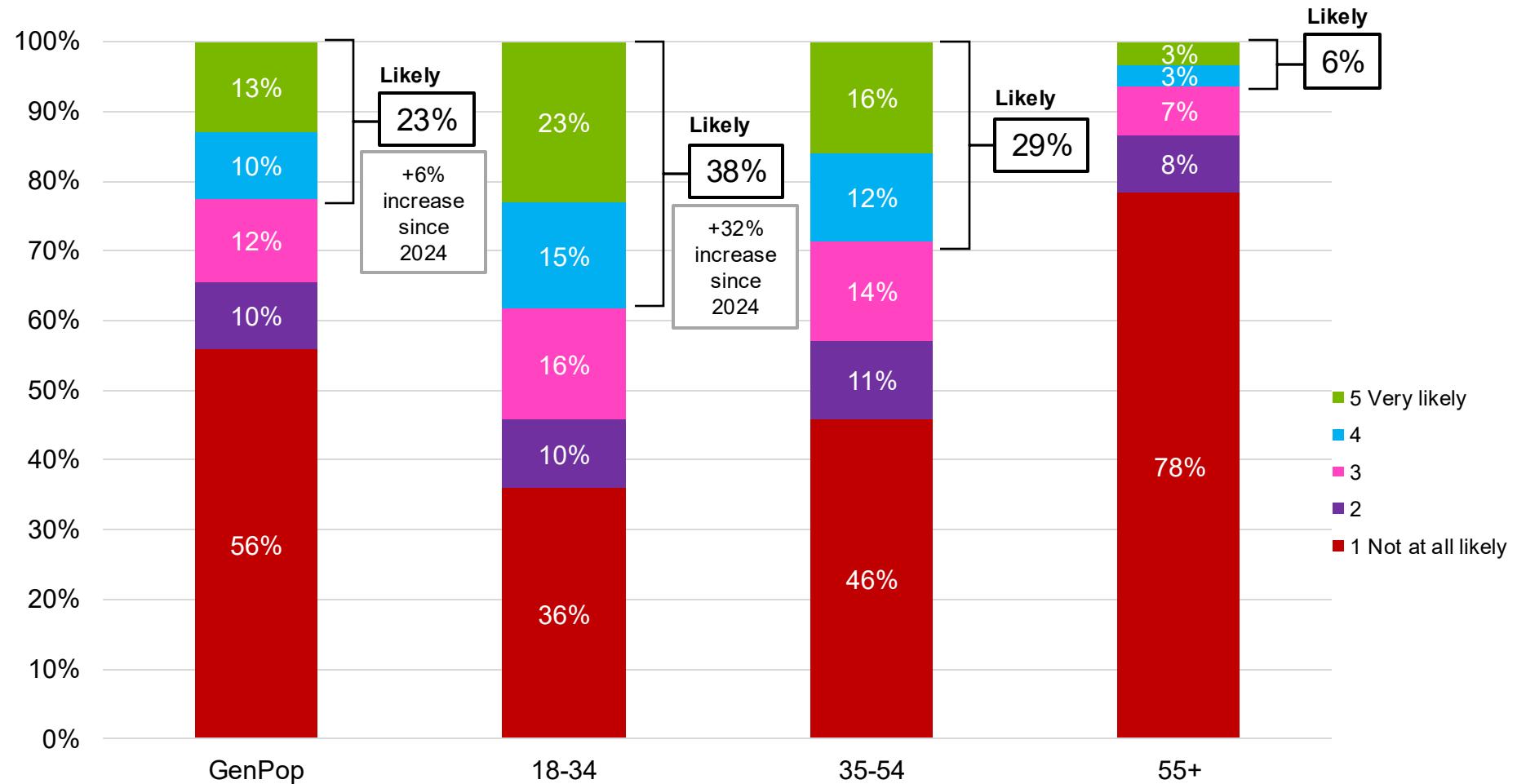


q173a: In U.S. dollars, approximately how much cryptocurrency do you currently own? (Among those who use cryptocurrency N=463, those who said "not sure" n=9)

23% of the general population say they are likely to buy cryptocurrency in the next year. Though there was a 32% increase in likelihood among those 18 to 34, this is just 4% higher than the 34% reported in 2022.

110

Likelihood to buy cryptocurrency within the next year

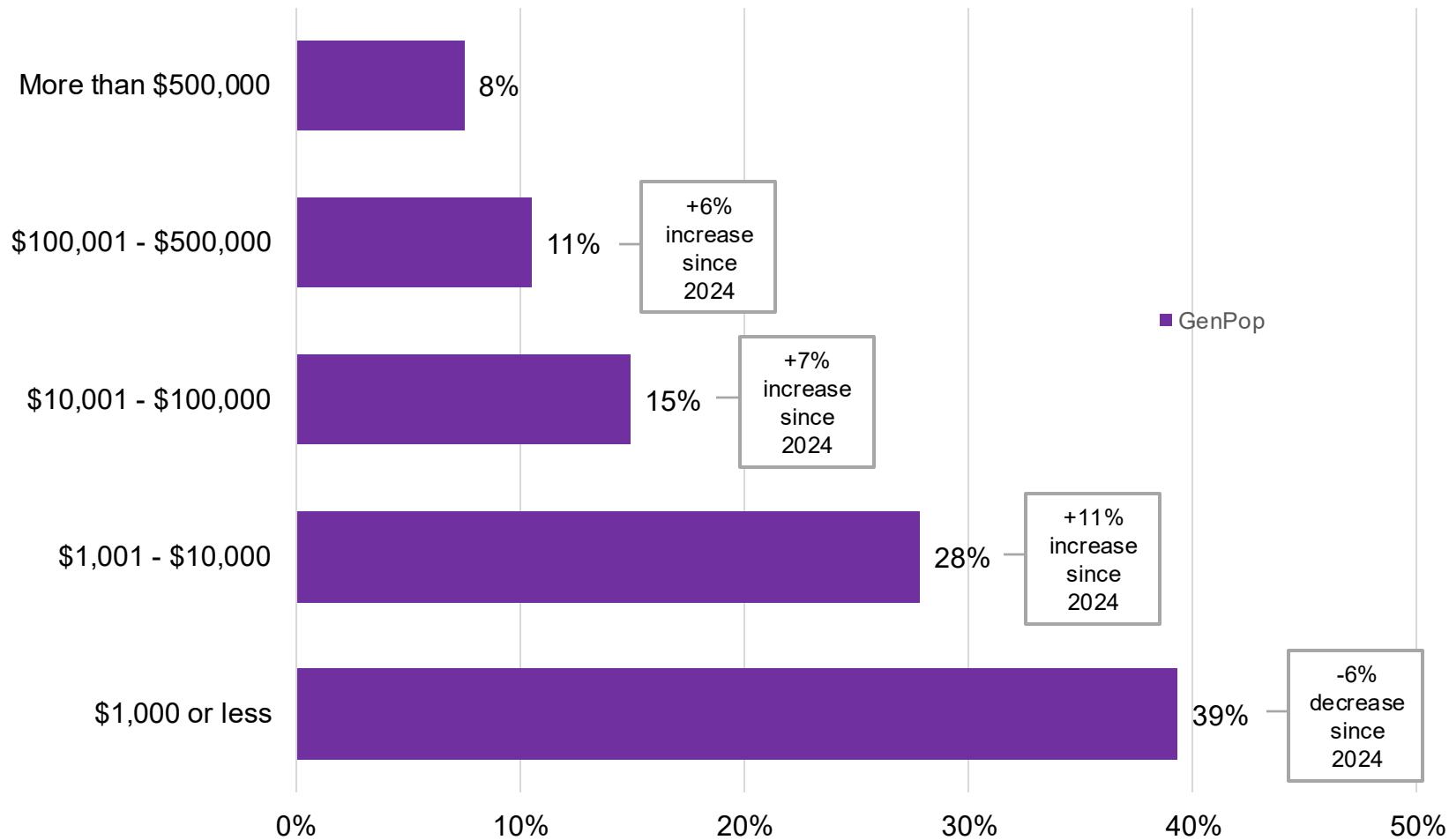


q174: How likely are you to buy any cryptocurrency in the next 12 months? (N=2,000)

61% of those who are likely to purchase cryptocurrency in the next year anticipate investing over \$1,000 in purchasing cryptocurrency.

111

Planned amount of cryptocurrency purchases anticipated in the next year

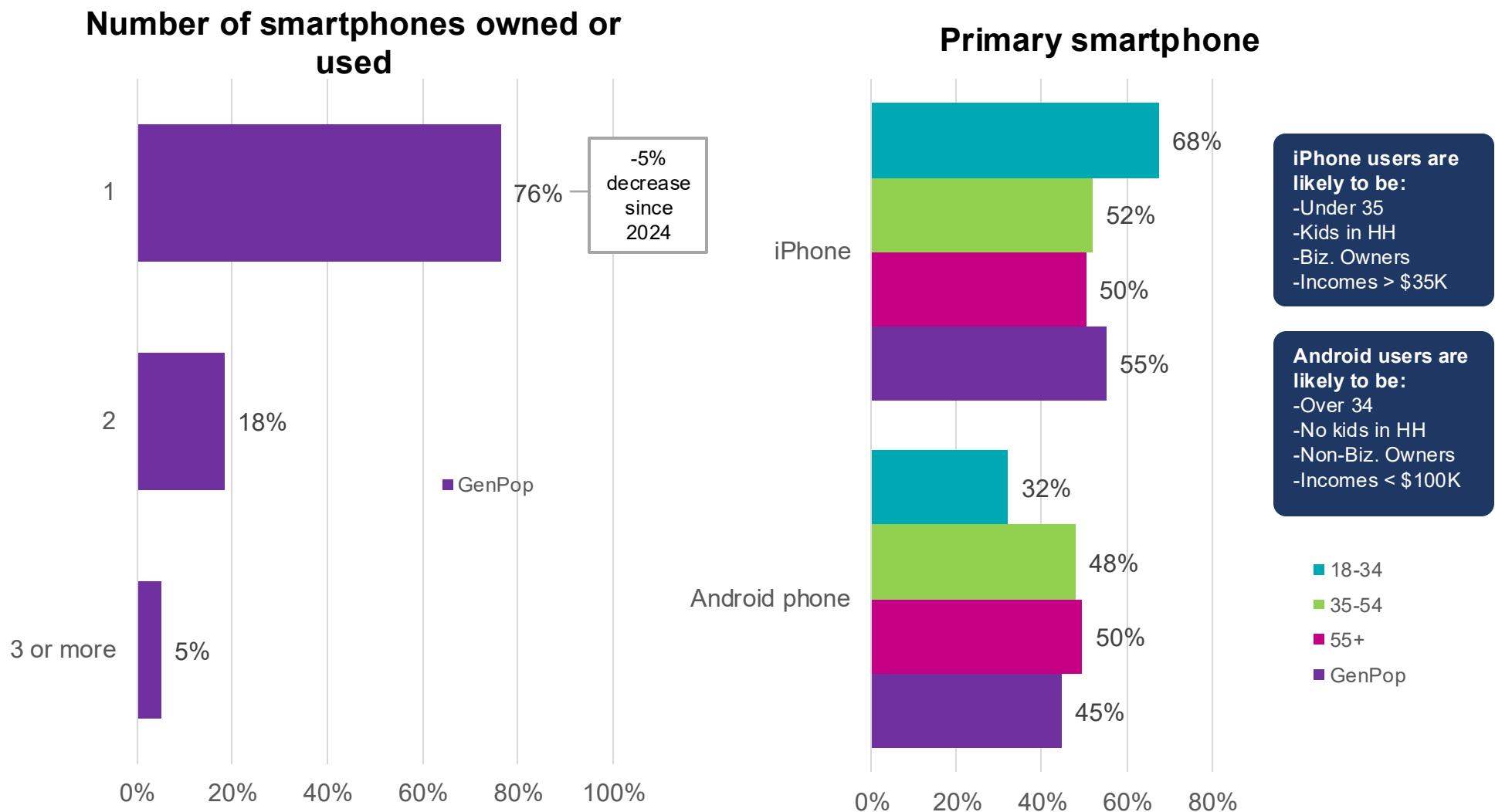


q174a: How much do you anticipate buying in cryptocurrency, within the next 12 months? (Among those who rate their likelihood to buy cryptocurrency a 3 or higher N=611; Those who said "not sure" n=77)

Smartphone

Most people have 1 phone. iPhones represent 63% of the market driven by those under 35. The Android market is strongest among those 35+, no kids, or those earning less than \$100K annually.

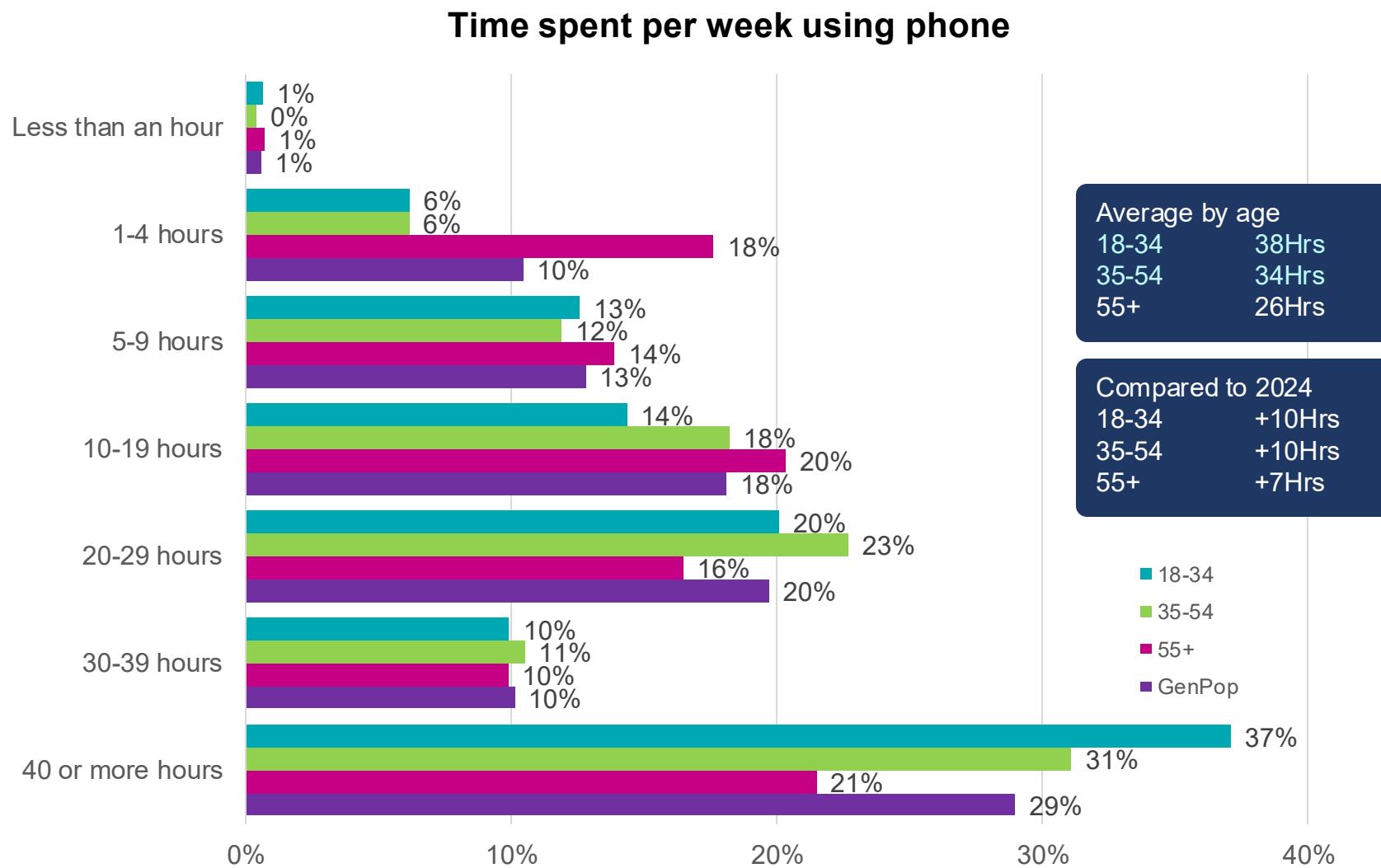
113



q187: How many smartphones do you own or use? (Among those who use a smartphone regularly N=1,882) q188: Which smartphone is your primary smartphone? (Among those who use a smartphone regularly; N=1,882)

Those below the age of 55 spend on average 36 hours a week on their phones. Those over 55 spend much less time on their phone. Average time spent using a smartphone has increased by 15 hours for those 18 to 34 and those 55+ since 2022.

114

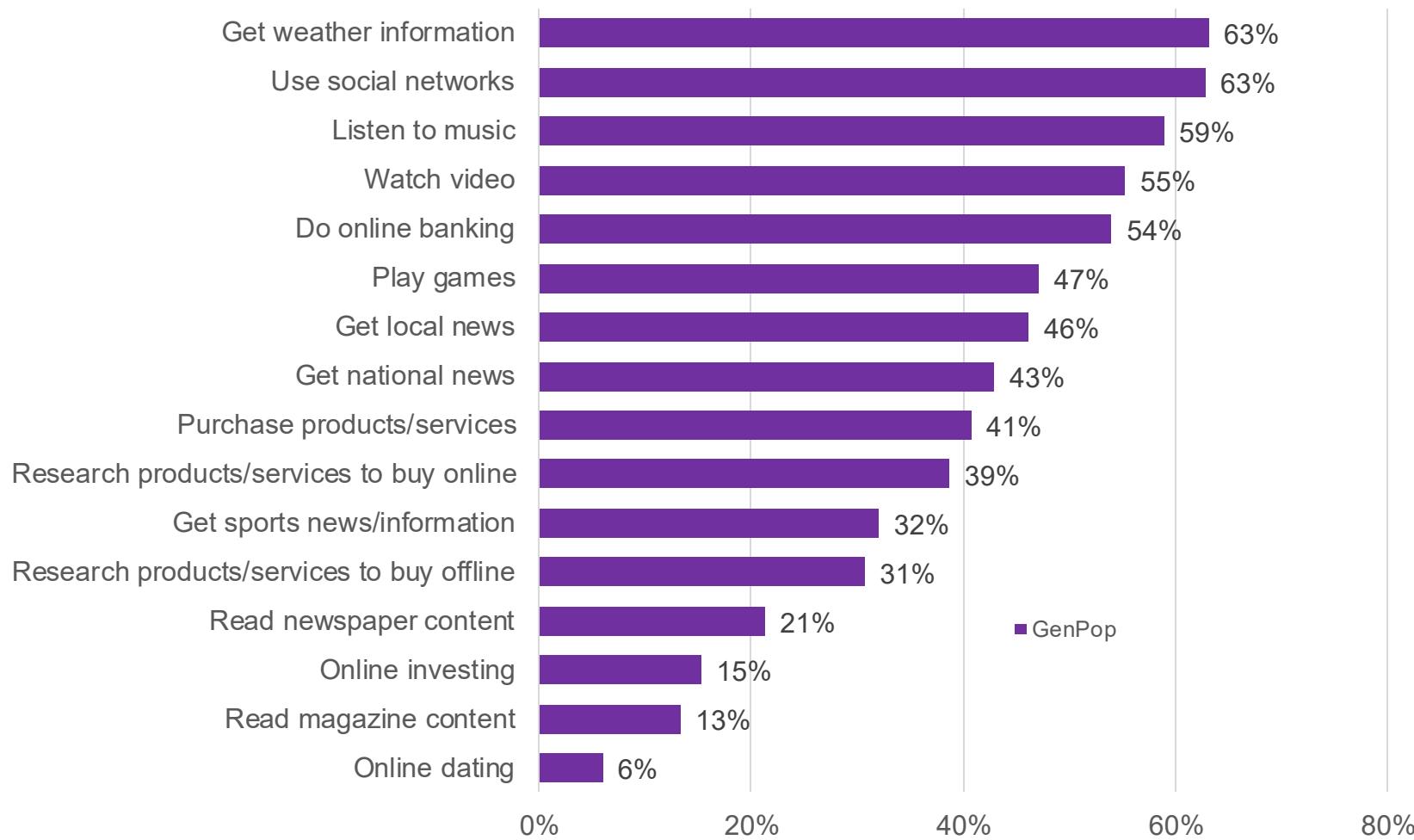


q189: About how much time do you spend using your smartphone in a typical week? (Among those who use a smartphone regularly; N=1,867; Those who said "not sure" n=15)

Weather information, social networks, and music are the most popular ways in which Americans use the phones every week. These population proportions are nearly identical to those reported in 2024.

115

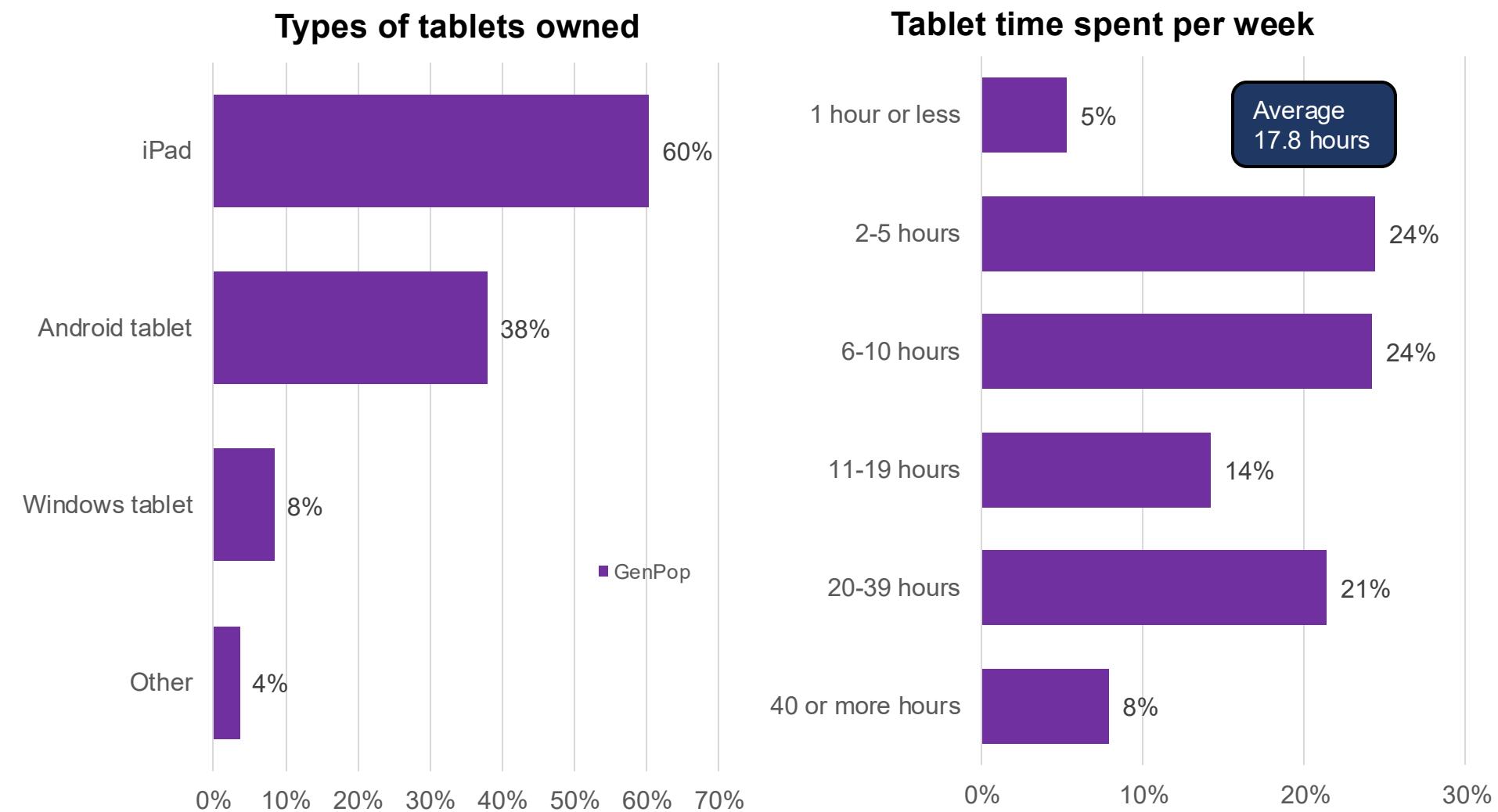
Weekly smartphone utilization



q190: Which of the following things do you do regularly (at least once per week) on your smartphone? (Among those who use a smartphone regularly N=1,882; multiple response)

People in the U.S. are much more likely to own an iPad rather than an Android tablet. On average, they are spending 18 hours on the tablet per week. A 4-hour gain compared to 2024.

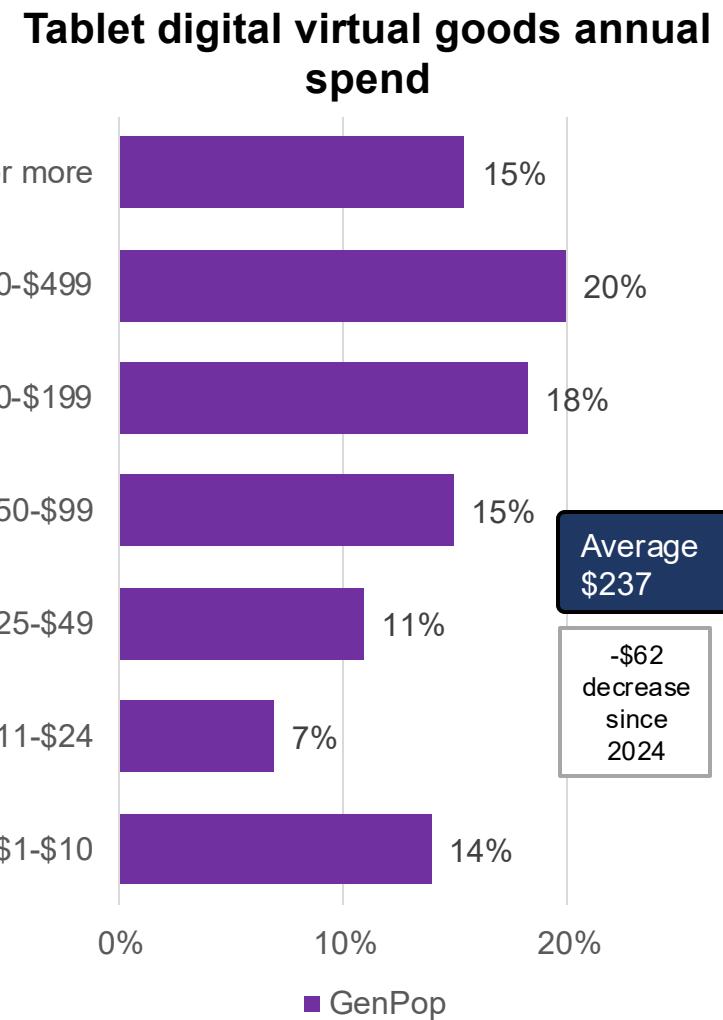
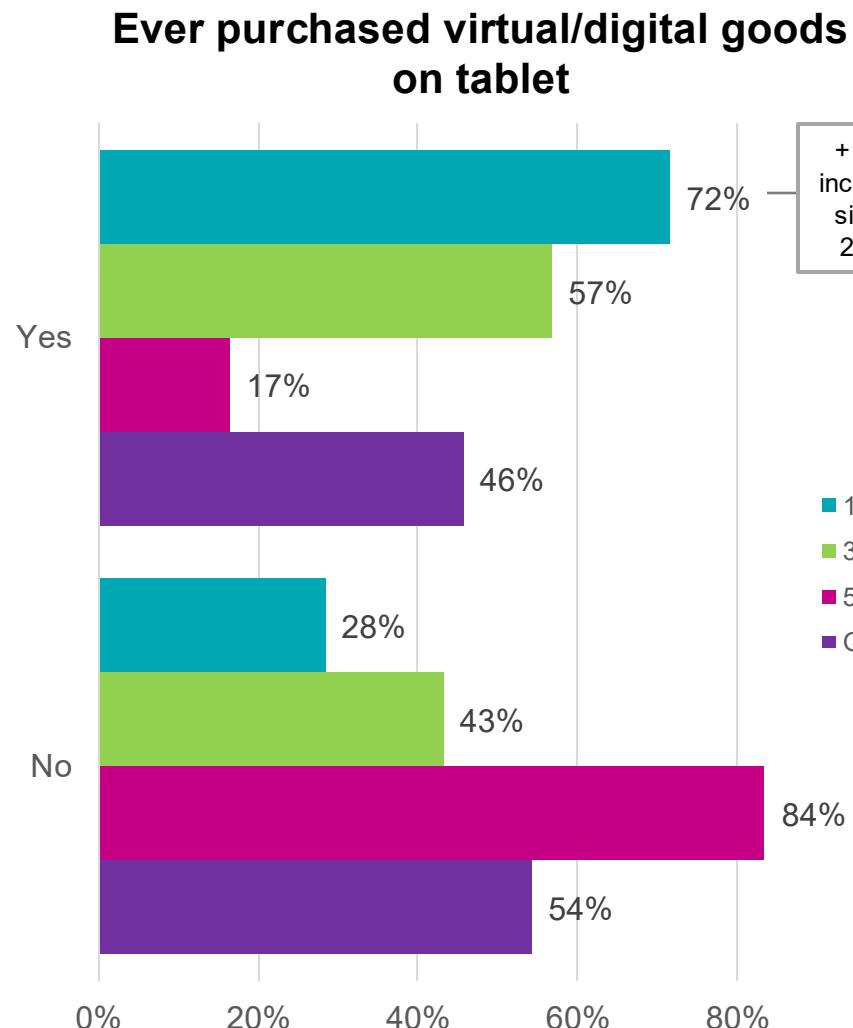
116



q14: Earlier you mentioned that you use a tablet. Which type of tablet(s) do you own or use? (Among those who use a tablet at least once per week; N=1,028; multiple response) q15: About how much time do you spend using your tablet in a typical week? (Among those who use a tablet at least once per week; N=941; Those who said "Not sure" n=2)

Tablet purchases are up 4% year over year driven by those 18 to 34. More are making purchases on tablet, but they are spending \$62 less on average since 2024.

117



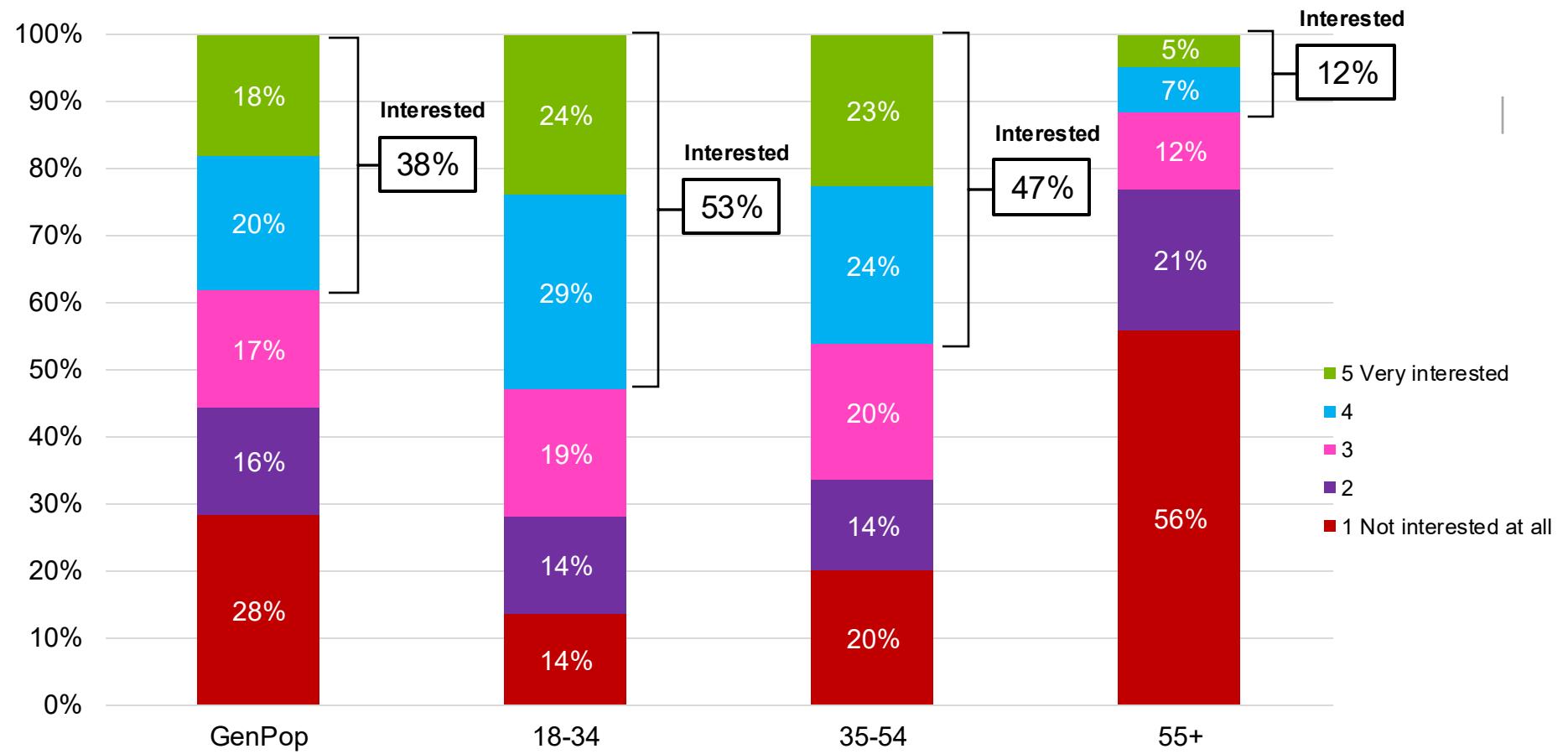
q16: Have you ever bought virtual/digital goods in games on your tablet? (Among those who use a tablet at least once per week; N=926; Those who said "not sure" n=17) q17: About how much did you spend in total on virtual/digital goods in games on your tablet in the last 12 months? (Among those who have bought digital/virtual goods on a tablet; N=423)

Augmented Reality Games

38% of regular mobile game players are interested in playing a mobile augmented reality game. Interest is in line with results from 2022.

119

Interest in playing an augmented reality game on their phone



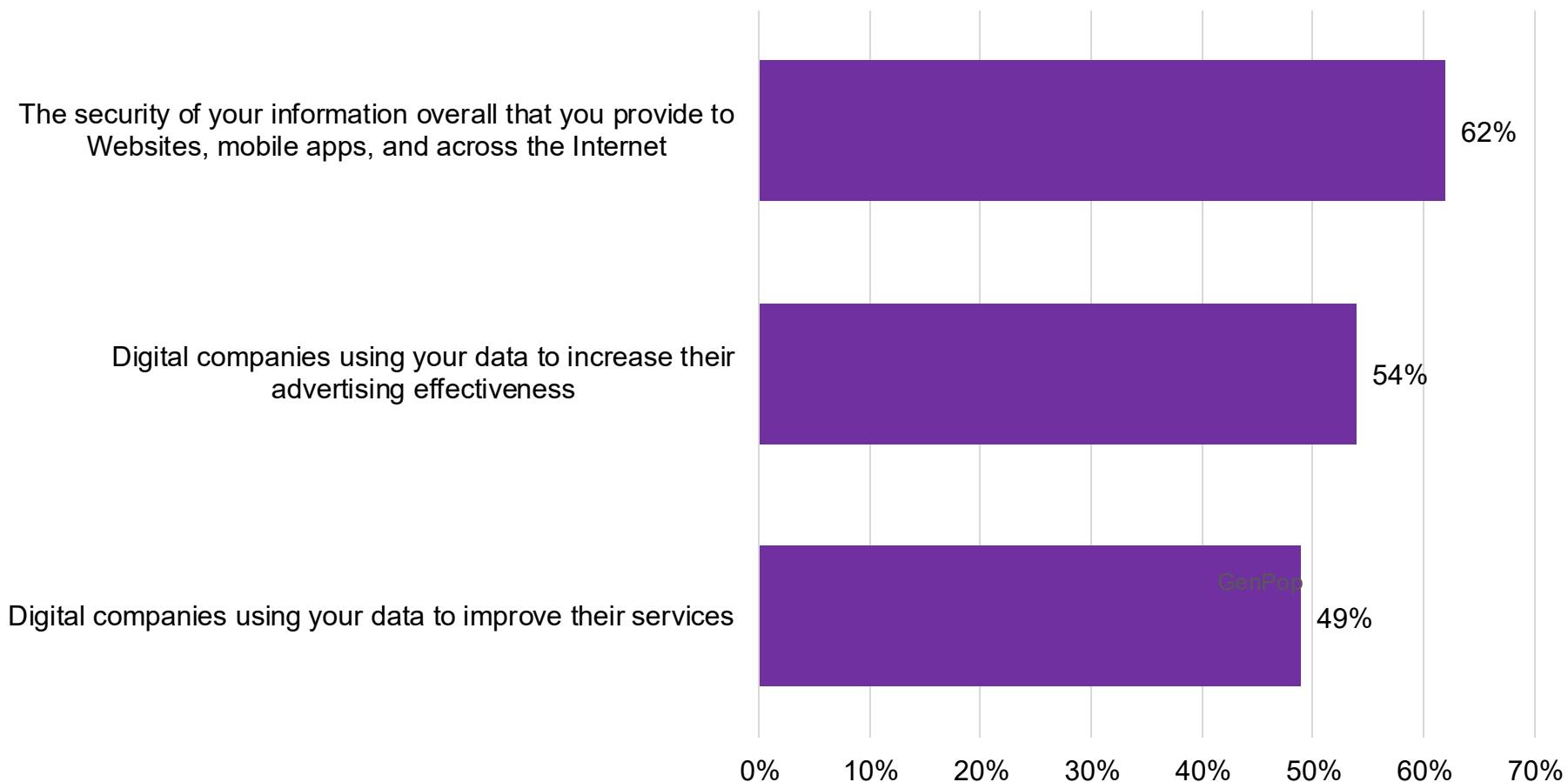
q193: How interested are you in playing a game on your phone that interacts with the real world (Augmented Reality) and use your actual physical location in the game (Geo-location game)? (Among those who play games on their smartphone at least once a week N=855)

Privacy Concerns

50% of Americans are concerned about digital companies using their data for ad effectiveness or service improvement. 62% are concerned with information privacy.

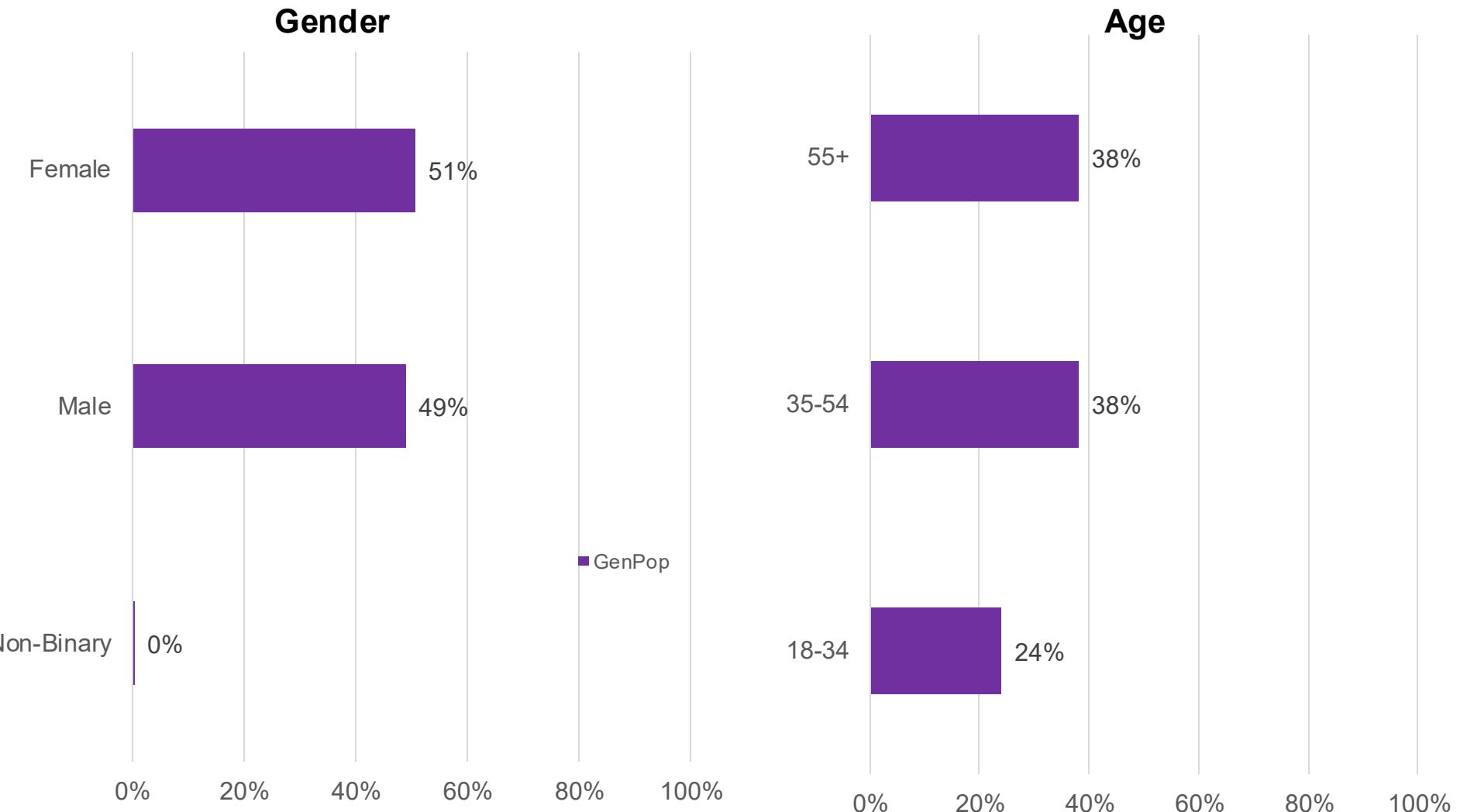
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Digital Privacy Concerns 2025



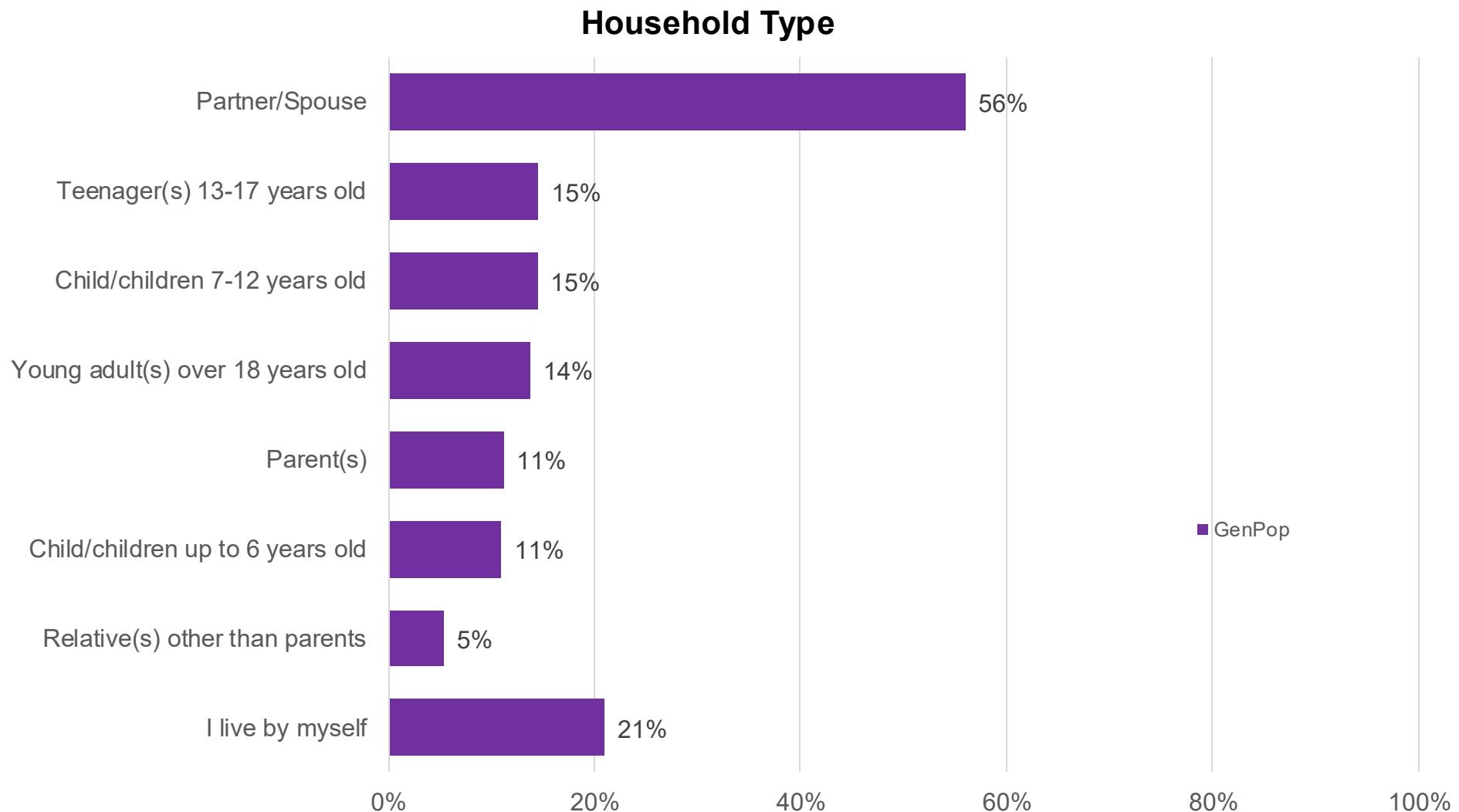
q221b: How concerned are you about the following? (N=2,000)

Classification



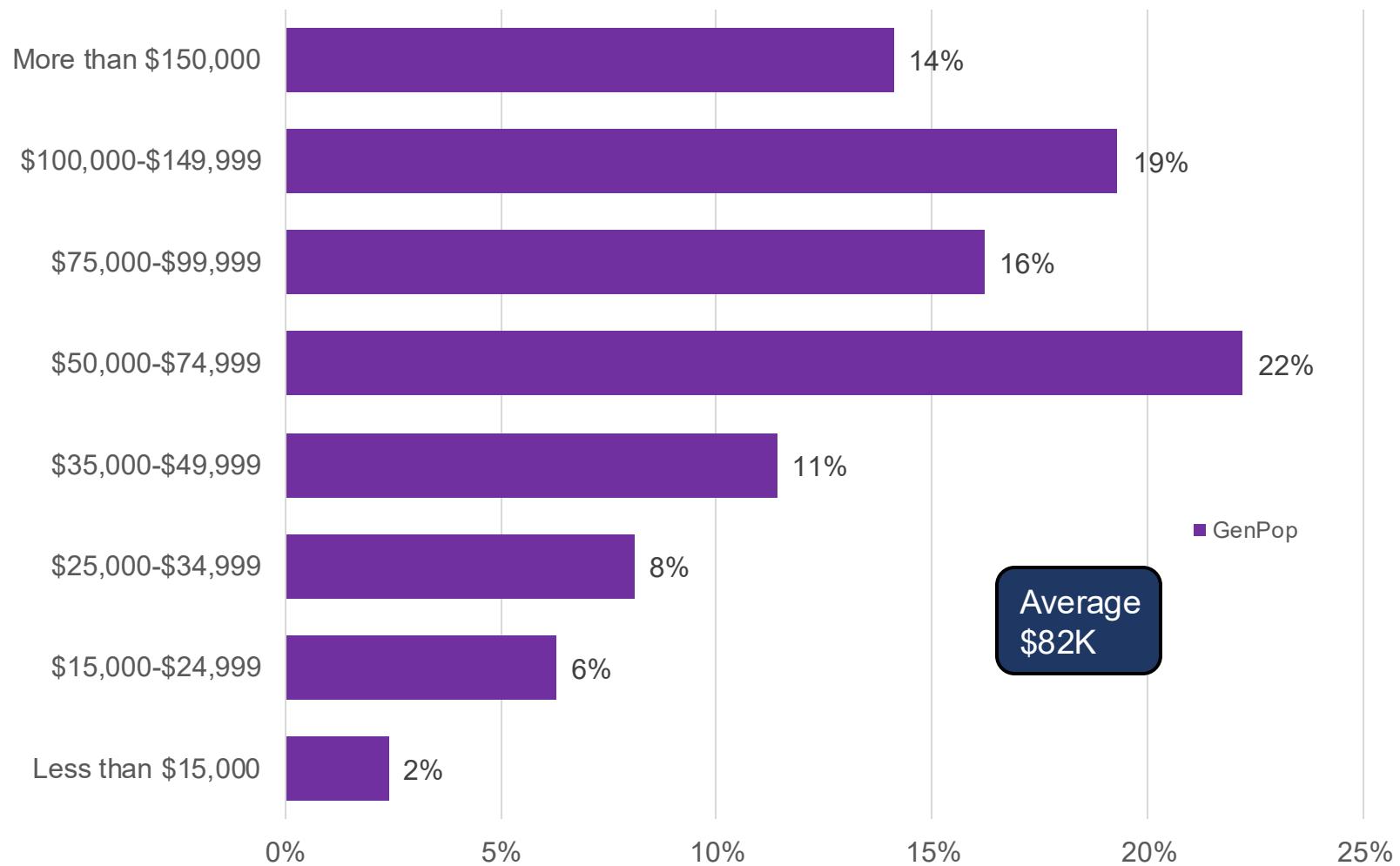
q2: What is your gender? (N=2,000)

q3: How old are you? (N=2,000)

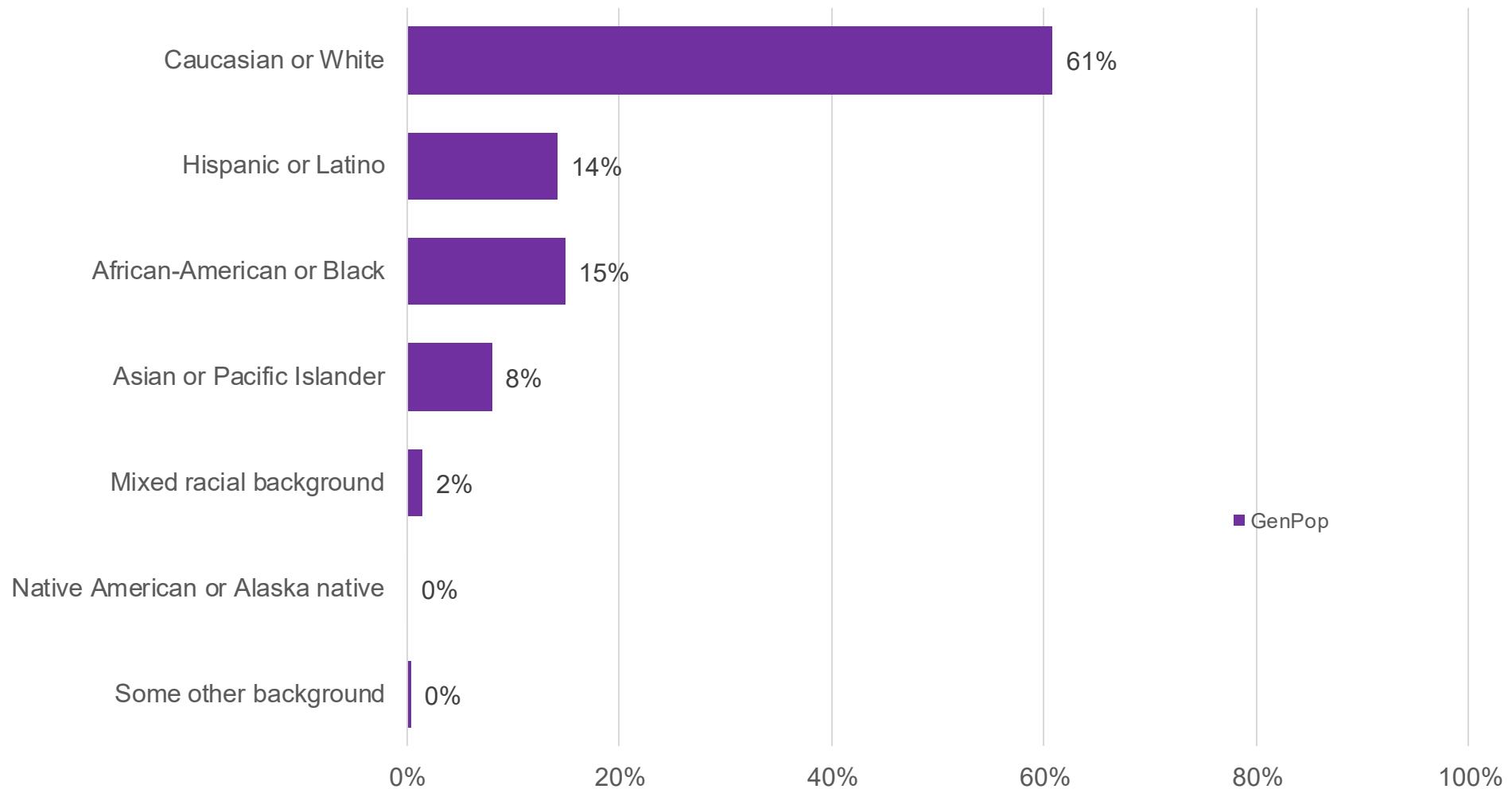


q4: Who lives with you in your household? (N=2,000; multiple response)

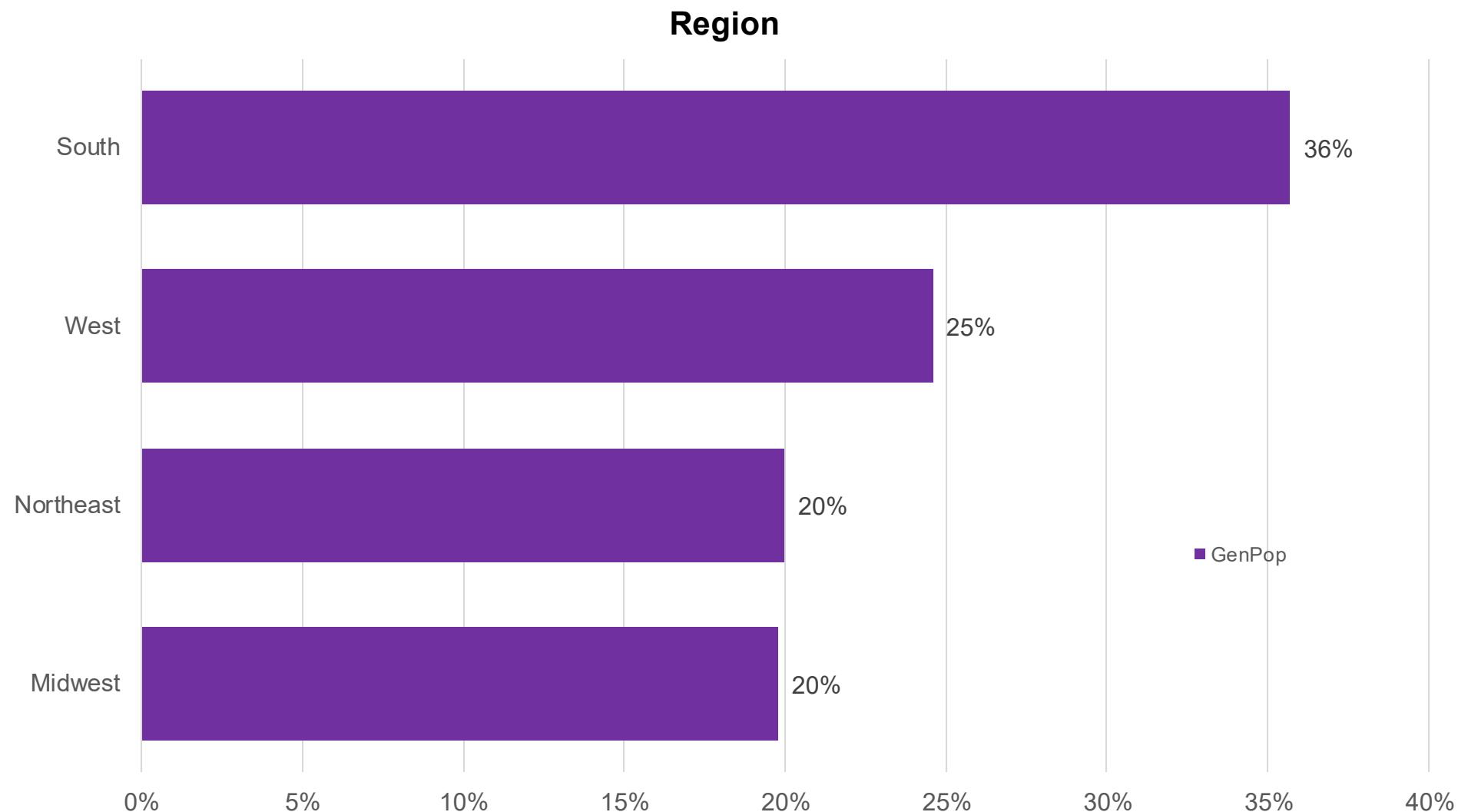
Annual Household Income



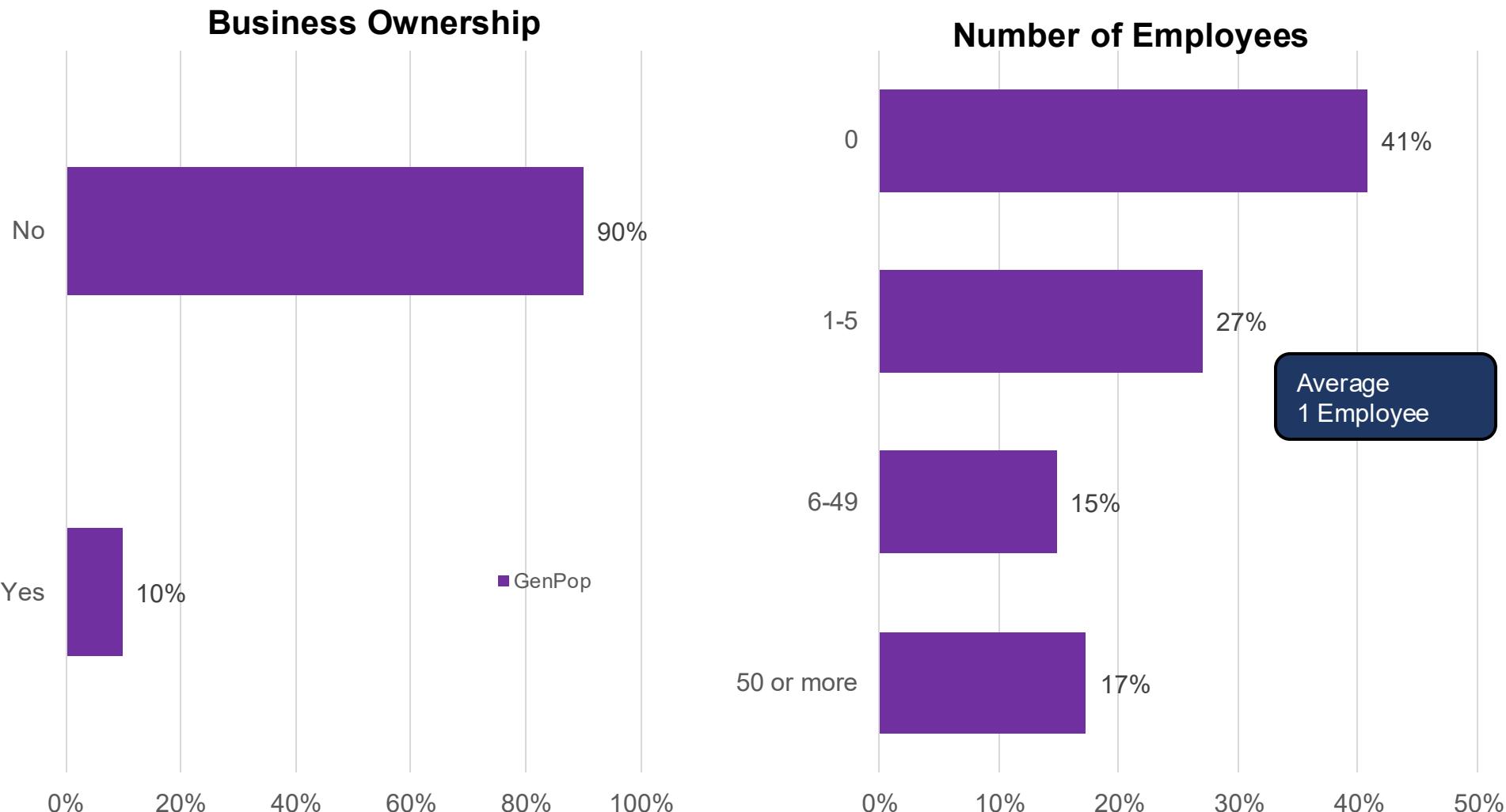
q227: What is your approximate annual household income before taxes? (N=1,987; Those that said “don’t know or declined to answer” n=13)

Ethnicity

q7: Which of the following best describes your racial background? (N=1,993 ; Those who said “prefer not to answer” n=7)

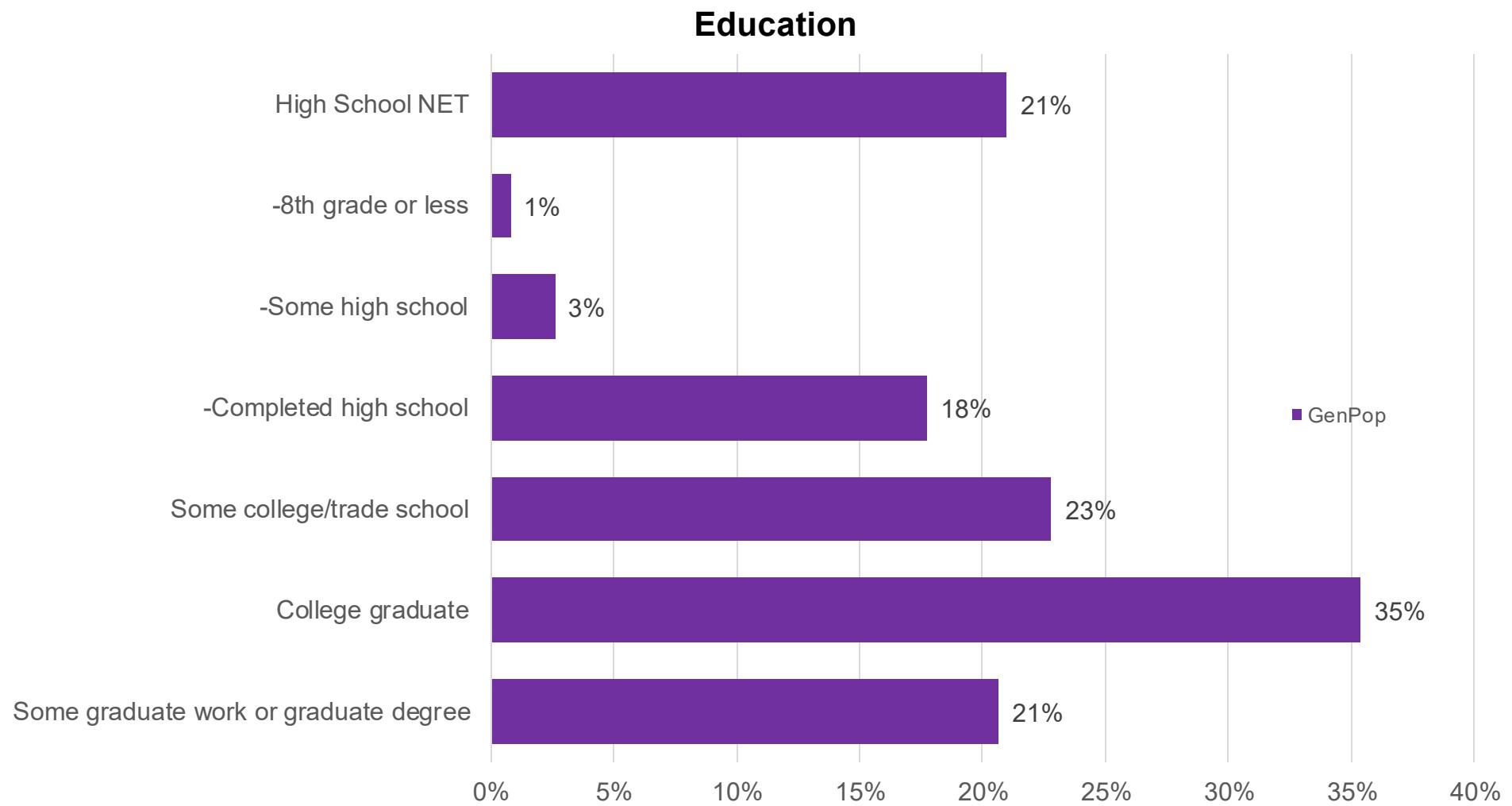


Region: Census region based on state lived in. (N=2,000)

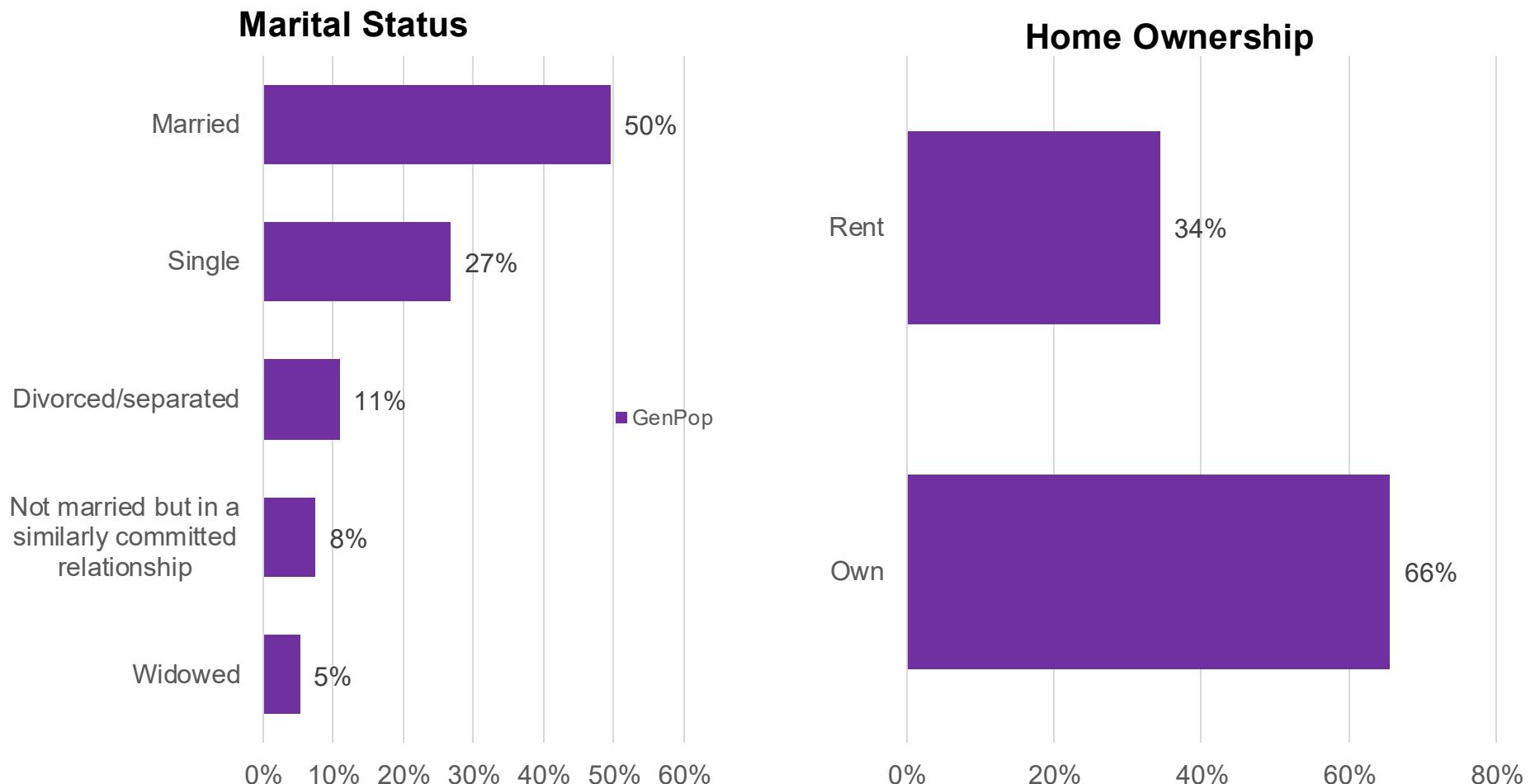


q8: Do you currently own your own business? (N=2,000)

o_q8: How many employees do you have? (Among those who own their own business; N=196)



q226: What was the last grade or level of school you completed? (N=1,990; Those who said "decline to answer" n=10)

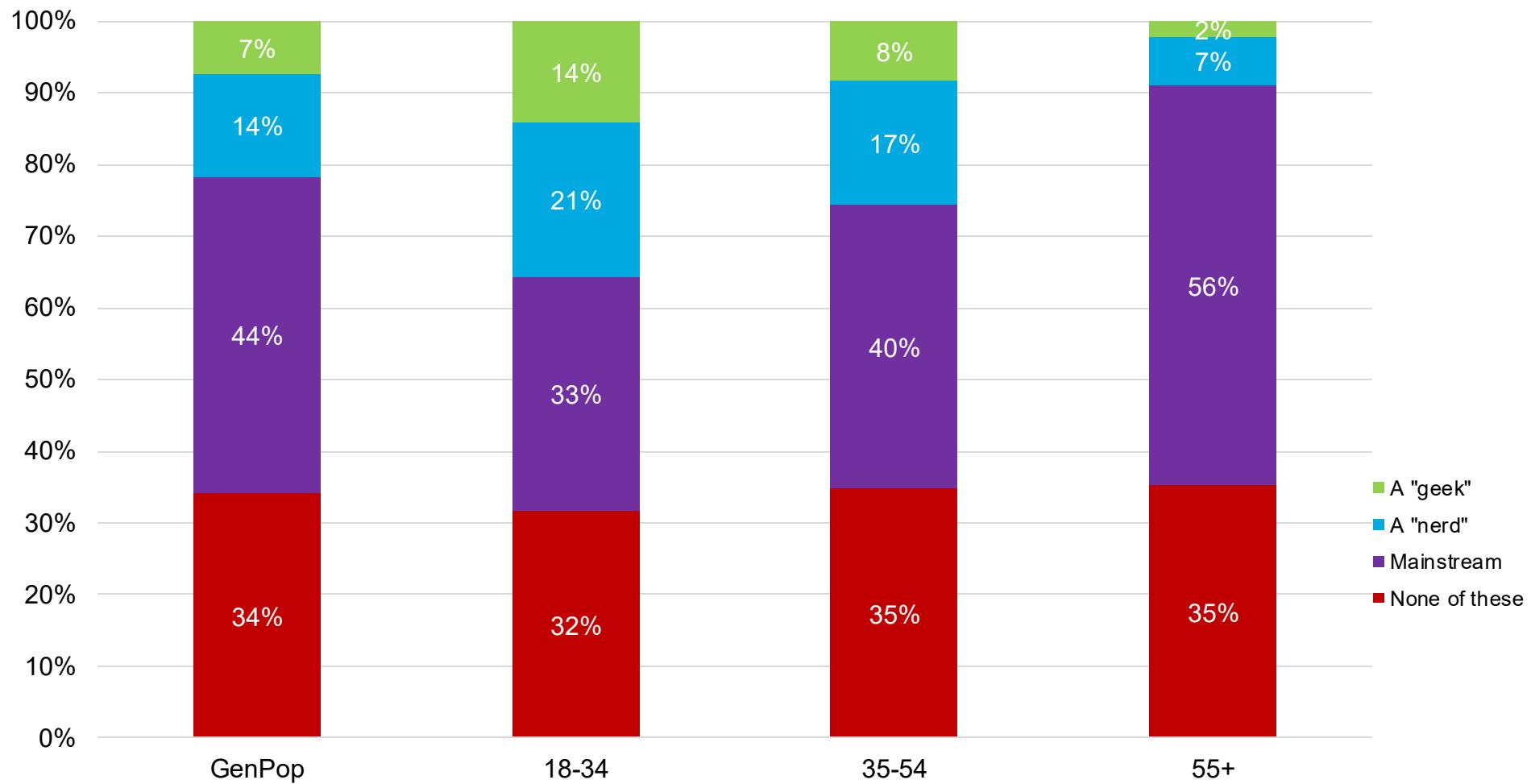


q228: What is your marital status? Are you currently...? (N=1,995; Those that said "decline to answer" n=5) q229: Do you own or rent your home? (N=1,966; Those that said "don't know/not sure" n=44)

35% of those 18-34 are likely to think of themselves as “nerds” or “geeks.” 56% of those 55+ describe themselves as mainstream.

131

Which of these describes you?



q230: Which of the following best describes you? (N=2,000)



Mike Vorhaus
CEO, Vorhaus Advisors



Nate Laban
CEO, Growth Survey Systems