



COMPLEMENTARY PREVIEW

# U.S. Gamer Segmentation

2024 Edition

August 2024

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# Table of Contents

<b>3</b>	<b>DATA SOURCES &amp; METHODOLOGY</b>
<b>4</b>	<b>ANALYST NOTE</b>
<b>5</b>	<b>TOPLINE FINDINGS</b>
6	Introducing the Player Segments
7	Top Headlines
8	U.S. Video Gaming at a Glance
9	Trends in Player Segments
10	Trends in Playing by Age
<b>11</b>	<b>U.S. GAMING AUDIENCE OVERVIEW</b>
12	Market Overview
13	Video Game Play
14	Video Game Spend
15	Device Ownership & Use
16	Planned Device Purchases
17	Video Game Habit Outlook
18	Game-related Live Events by Segment
19	Game-related Live Events by Age
<b>20</b>	<b>BEHAVIORAL SEGMENTATION &amp; PROFILES</b>
21	Segment Demographics
22	Segment Gaming Investment
23 - 34	Gamer Segment Profiles
<b>35</b>	<b>APPENDICES</b>
36	Circana Genre Systems—Mobile   PC/Console



# Data Sources & Methodology

The analysis in this report is based on an online survey of 5,100 active U.S. gamers (ages 2+) conducted in May through June of 2024.

**Participants in this survey were recruited from two representative pools:**

**Adults** (respondents ages 18+) were recruited for participation directly and completed the survey based on their own habits.

**Children/Teens** (ages 2–17) were recruited via parent surrogates.

Children over age 10 were instructed to complete the survey themselves (with parental help, if needed). Parents of younger children were asked to complete the survey on the child's behalf, with the child's help.

**Respondents qualified as active gamers for the purpose of the study if they met the following criteria:**

- Own or have access to (if shared) at least one qualifying device:
  - **Mobile:** iPhone, Android smartphone, iPad, Android tablet, Kindle Fire tablet, Windows Phone, Windows Surface tablet, other smartphone or tablet device
  - **Computer:** Desktop, Laptop, Steam Deck, or other portable PC devices
  - **Console:** PlayStation 5, PlayStation 4, PlayStation 4 Pro, Xbox Series X, Xbox Series S, Xbox One, Xbox One X, Nintendo Switch, Nintendo Wii U, Nintendo Wii
- Personally used at least one qualifying device to play a video game within the month of the survey.

**Platform/Device segments are based on usage within the past month of play on at least one qualifying device:**

- **Mobile Gamer:** played a game on a smartphone or tablet
- **PC Gamer:** played a game on a desktop or laptop or handheld PC device (not specific to Windows OS)
- **Console Gamer:** played on a game on a qualifying console



# Analyst Note

**Mat Piscatella**  
Executive Director, Industry Analyst  
Circana Games & Entertainment



## The video game player base is transitioning to a new, perhaps temporary, normal

Following a period of rapid audience and engagement expansion, when video games provided family and friends the ability to connect virtually when they could not do so in person, we are seeing further shifts in how and why people are engaging with the medium.

Since March 2020, gaming has undergone both a short-term boost – and perhaps a longer-term positive trajectory change. Many of the gains in both player count and engagement experienced during 2020 have held (or fallen only slightly) as people have returned to in-person activities and experiences. It is likely the market will return to its long-term engagement growth trend following this adjustment period.

There have been significant shifts in how the wants and needs of players have changed along with the world around them since the beginning of the COVID-19 pandemic, which are reflected in the following pages and the accompanying data tables. It's true that average hours played, and total player counts, have declined slightly in 2022 compared to 2020. But what may be more important for long-term planning are the shifts around the aging up of the player base, and the expansion of incidental play.

These shifts in player behavior are occurring as the gaming space itself evolves. With cross-play, cross-progression and cloud gaming, barriers between screens and devices are being shattered. As self-publishing becomes easier, and as subscription services expand, gaming experiences of seemingly infinite types and themes are readily available to all types of players regardless of budget. Games have become immersive experiences that retain player attention for years, as current hit franchises such as Fortnite, Roblox and Minecraft suggest that we have entered the era of the forever game.

And all this is happening while significant investment is being applied to other developing, but still nascent, areas of interactive entertainment.

Nearly three of every four U.S. consumers play video games, and this player base comes from across demographics. Video gaming is not just a mainstream entertainment medium to many, it is itself a lifestyle. While the market is indeed transitioning into its new normal, the outlook for the space remains as optimistic as it has ever been.



# Topline Findings



# Introducing the player segments

These six segments represent the dominant play and spending behaviors of U.S. video gamers in our study

## Super Gamers

Super invested and super engaged – the broadest and deepest gamers on the market

## Console Warriors

They keep up with the latest trends and enjoy action-packed multiplayer experiences

## Transitionals

Adult gamers with a preferences for more flexible gaming platforms; heavily invested on mobile

## Easy Accessors

Younger gamers whose platform access is limited, leading them to play primarily on mobile

## Daily Dabblers

Older gamers who regularly play familiar casual games on PC and/or mobile

## Incidental Players

Non-gamers who play mobile games because they provide another way to use their device

of U.S. gamers

of U.S. gamers

of U.S. gamers

of U.S. gamers

of U.S. gamers

of U.S. gamers

**METHODOLOGY:** To get these six segments, we clustered respondents based on the platforms they use, their play habits, investment, and preferences on those platforms, and their unique motivations for gaming. These range from extremely core and invested (on the left) to extremely casual (on the right). These groups are exclusive – meaning a gamer will only fit into one segment at a given time – but they are not static. The average gamer will move through multiple segments during their life, shifting into different segments as they age and encounter major life events. **Learn more starting on page 24.**

# Top Headlines

## PLAYER COUNT DOWN, BUT STILL HIGHER THAN PRE-PANDEMIC COUNTS

A return to outdoor and public activities have caused some churn in the gaming population which surged during the pandemic, but much of those gains have been retained. 71% of U.S. consumers engage with video games, down from the 74% seen during 2020, but higher than the 67% reported in 2018.

## INCIDENTAL PLAYER SEGMENT DROPS, SOME EXIT, SOME TRANSITION

This group of first-time players who usually play on mobile devices and are getting in a convenient introduction to the largest slice of the gaming market is still growing, but at a slower pace than in 2020. Many of these players have moved to mobile consoles in the second half of the gaming ecosystem in 2020, and others have been lured by the convenience of mobile consoles such as Nintendo Switch, which also allows players to transition and effectively play higher-end titles. This group is still growing, but at a slower pace.

## TIME SPENT ON GAMING IS UP OVER 2021, BUT SPENDING IS MIXED

With the shift away from first-time players, average time and spend on gaming has increased across the remaining gaming ecosystem. While Nintendo, Xbox, PlayStation and Steam continue to see growth, mobile gaming has seen a decline in spend. Nintendo Switch, Xbox and PlayStation have seen a decline in spend of 10% on average. This may be due to a shift in the market towards mobile gaming, as well as higher inflation driving consumers to spend on other products.

## CURRENT CONSOLES HAVE SEEN WIDER ADOPTION SINCE 2021

Adoption of the console game has increased since 2021, with PS5 and Xbox Series X/S leading the way. PS5 adoption grew from 11% in 2021 to 15% in 2022, while Xbox Series X/S grew from 11% in 2021 to 15% in 2022, maintaining the lead in the console market. With the introduction of the Switch due to come out in 2023, Switch growth has slowed down, with only 1% in 2022.

## VR GAMING GROWS, PC PORTABLES APPEAL TO THE MOST INVESTED

VR as a segment grew an additional 1% since 2021, with new hardware such as the Meta Quest 2, PlayStation VR2, and Xbox Series X/S leading the way. PC Portables is a new category for 2022. PC Portables adoption stands at 1%. The most significant adoption stands at 1% in the last 1% of the market, with a PC Portables device.

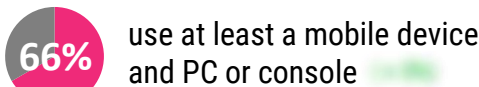
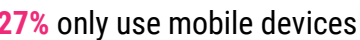
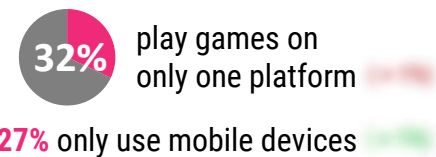




# U.S. Video Gaming at a Glance

Overall gaming participation is down - but time and dollar spend for those who are playing is up since 2022

Total video game revenue rose 10% in 2023, but the number of gamers fell 1%. The average gamer spent 15 hours per week on video games in 2023, up from 14.5 in 2022. Revenue rose 10% to \$56.2 billion, up from \$51.1 billion in 2022. The average gamer spent \$56.20 on video game purchases in the past 6 months, up from \$51.10 in 2022.



## Mobile



Mobile gaming is the most common form of gaming and on average accounts for over half of gamers' weekly play. Most play because the device is one that they already own and carry, and the experiences are cheap / accessible.

## PC



PC gaming does not have a cohesive identity as it appeals both to casual gamers (who enjoy easy access to familiar game types) and core gamers (who like the hardware customizability and range of control options).

## Console



Consoles are the device of choice for gamers who are seeking more action-oriented, core experiences (e.g. Shooters, Sports), want to play with friends (in-person or online), or prefer a more casual setting for their gaming.

## Other



This includes users of designated gaming handhelds, as well as those who use virtual reality headsets, plug-and-play devices (e.g. Nintendo NES Classic Edition), and child-oriented devices (e.g. Leapfrog). Growth in this category is driven by VR. Ownership of these device types is generally low (<6% total per sub-category outside of the 3DS).

Source: The Circana Gamer Segmentation Report, 2024. Gamers are defined as those who have used a qualifying mobile, PC, or console device to play a game in the past month (see pg.15 for list of devices). Time and spend are based on self-reported habits and investment across devices used. 2024 survey data was collected in June 2024, and responses collected refer to engagement during the 30 days prior to the survey.

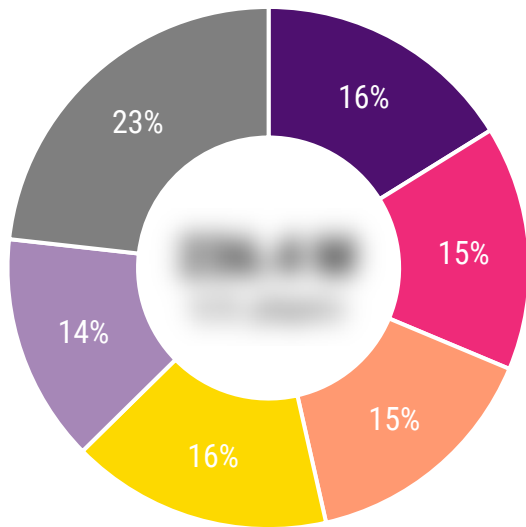


# Trends in player segments

Gaming engagement decreased slightly overall, with a shift away from Daily Dabblers and Incidental Players, toward Super Gamers and Transitionals.



Segment share



- Super Gamers
- Console Warriors
- Transitionals
- Easy Accessors
- Daily Dabblers
- Incidental Players

Segment trends 2018 - 2024

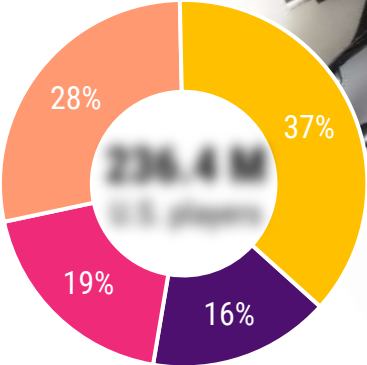
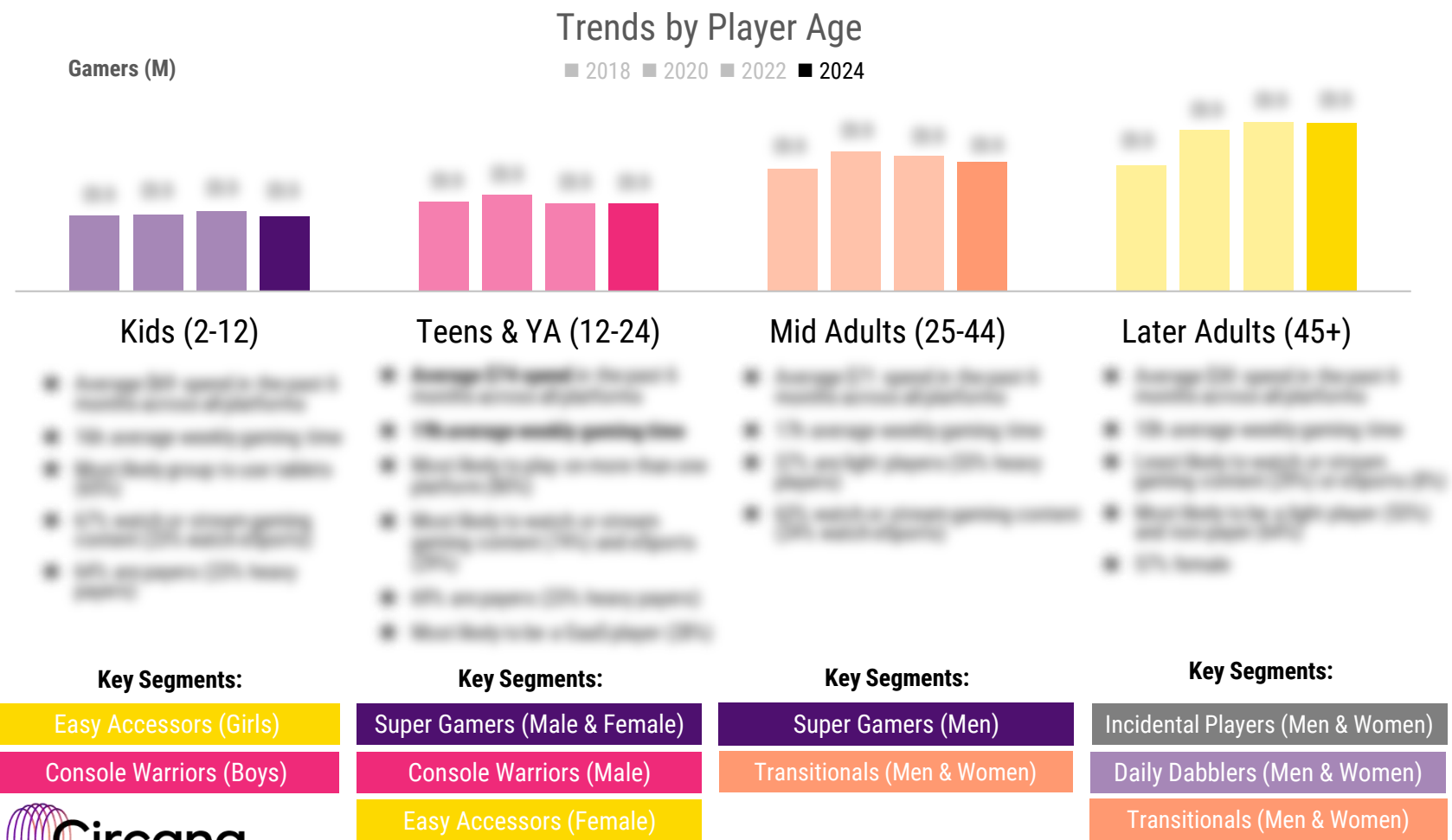


The biggest change to note is a significant decrease in *Incidental Players* and *Daily Dabblers*, which accounted for a combined

37% of total U.S. video game players, down from 40% in 2018. Some of these players have exited the market since the end of the pandemic, leading to the overall decrease in the gaming population in 2024, but many have transitioned into higher investment segments as well, including Transitionals which increased from 10% in 2018, to 15% in 2024, and Super Gamers and Easy Accessors which both had 10% increases since 2018.

# Trends in playing by age

The decline in gamers across the population since 2022 has been consistent across all age groups, but investment in time and spend are up across most segments. Teens & YA are the most valuable by dollar spend and time played.



Age share

In 2024, **Later Adults** accounted for 37% of total U.S. video game players, driven by women and an increased interest in console gaming. While it remains the largest share of gamers, it has decreased for the first time since 2018, but still saw the most growth of any segment in average spend over 2023. On the other hand, average spend by **Teens & Young Adults** is slightly down over 2023, but they remain the most valuable age overall in both time and dollars.





# U.S. Gaming Audience Overview

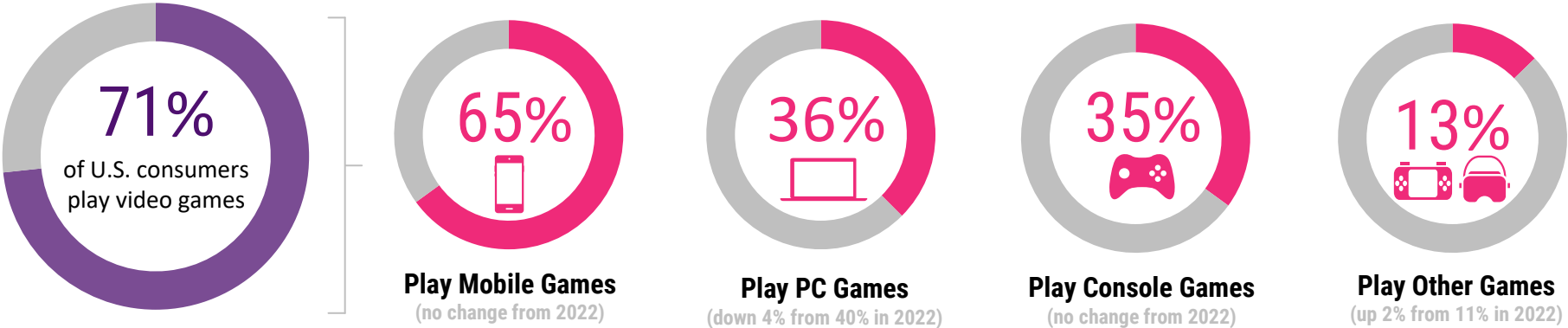


# Market Overview

## Nearly three of every four U.S. consumers play video games

Mobile remains the largest platform with 65% of U.S. consumers engaging in mobile gaming in 2024. Along with the console category, it experienced no point change from 2022. While more than 1/3 of gamers still play on PC, PC gaming has declined by 4% since 2022. Other gaming devices have grown 2% since 2022 due to further adoption of VR.

% of U.S. Consumers...



Total Gamers (Ages 2+)

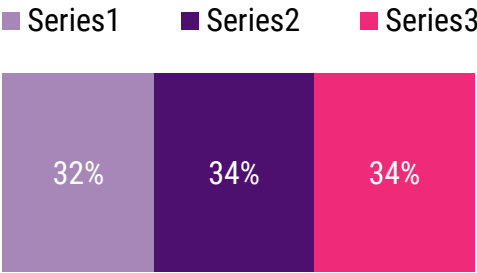
71% of U.S. consumers, or 126.8M, have played video games in the past month. This is up from 65% in 2022. The number of gamers has increased by 10% since 2022, with 10% of gamers using more than one device in 2024.

Most gamers are able to play on at least one multiplatform device. 50% of gamers use a Smartphone, Tablet, Gaming Console, and/or Laptop Computer up from 40% in 2022.

Play on a designated device also increased this year, with 50% of gamers using a console in 2024 compared to 40% in 2022.

### Number of Device Types Used

U.S. Gamers, Ages 2+



Source: The Circana Gamer Segmentation Report, 2024. Play rates reflect total reported use of a qualifying device to play a video game within the past month by U.S. consumers ages 2+. Device types for each platform include mobile (smartphone, tablet), PC (desktop or laptop computer), console (PS5, PS4, PS4 Pro, Xbox Series X, Xbox Series S, Xbox One, Xbox One X, Nintendo Switch, Wii U, Wii), Other (Gaming Handhelds, Portable PC, plug-and-play devices, VR headsets, and child-oriented devices).



# U.S. Video Game Play Time

Gaming time is up across all platforms - but especially on console

On average, gamers are spending more time playing video games across platforms, up 14.5 hours per week compared to 12.7 hours in 2022. Console was the biggest driver of play time, up almost two hours since 2022. While most gamers are still most likely to be lightly involved in gaming at home (41%), light players are down 1% from 2022 while Moderate Players are up 1% and Heavy Players are up 1%. All average play times within these groups are up from 2022.



Gamers spend an average of  
**14.5 Hours a week**  
playing video games  
[across mobile, PC, and console]

▲ 1.8 hours since 2022

## 41% are Light Players

who play less than 5 hours per week -

- They're an average of 1.5 hours a week
- Are likely to play on one device (41%), and are especially likely to be mobile-only gamers (41%)

## 30% are Moderate Players

who play between 5 and 15 hours per week -

- They're an average of 7.1 hours a week
- Are likely to play on multiple devices at least once (66%); 21% only play on mobile

## 28% are Heavy Players

who play more than 15 hours per week -

- They're an average of 21.9 hours a week
- 65% play across multiple platforms, and 31% use 3 or more



**92% play mobile games**

**Mobile gamers play an average of:**

**8.1 hours per week**

▲ 1.1 hours from 2022

- 65% play less than 1 hour per week
- 21% play 1-1.5 hours per week
- 14% play for 1.5 hours or more per week



**51% play PC games**

**PC gamers play an average of:**

**4.6 hours per week**

Flat from 2022

- 65% play less than 1 hour per week
- 21% play 1-1.5 hours per week
- 14% play for 1.5 hours or more per week



**50% play console games**

**Console gamers play an average of:**

**10.2 hours per week**

▲ 1.9 hours from 2022

- 65% play less than 1 hour per week
- 21% play 1-1.5 hours per week
- 14% play for 1.5 hours or more per week

Source: The Circana Gamer Segmentation Report, 2024.

Play time is based on self-reports of device usage on an average week to play games.

Values reported in parentheses reflect difference in reported play habits between 2022 and 2024 – green denotes an increase in reported time spent, pink denotes a decrease in reported time spent, and black reports no change.

# Device Ownership & Use

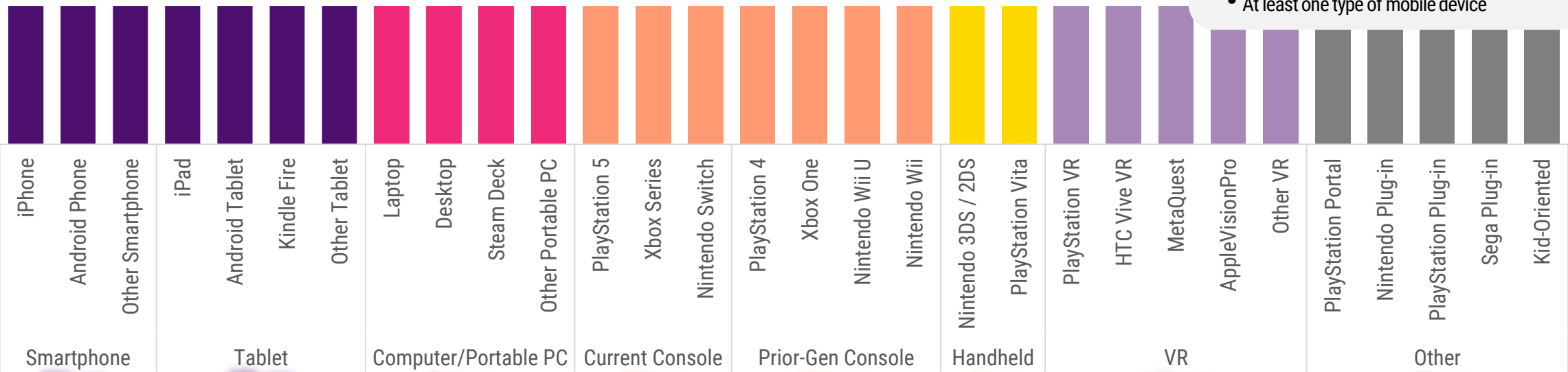
Usage is up across many platforms with current consoles and PS5 as the standouts in ownership/usage growth since 2022



Device Types Used to Play Games – Last Month  
U.S. Gamers, Ages 2+, June 2024



Percentages and change metrics flattened for this white paper



Avg. # of Device Types in Gamers' Households: 5  
Avg. # of Devices Types Used for Gaming: 3  
**The average gamer uses:**

- A PC or console
- At least one type of mobile device



# Behavioral Segmentation & Profiles



# Segment Demographics

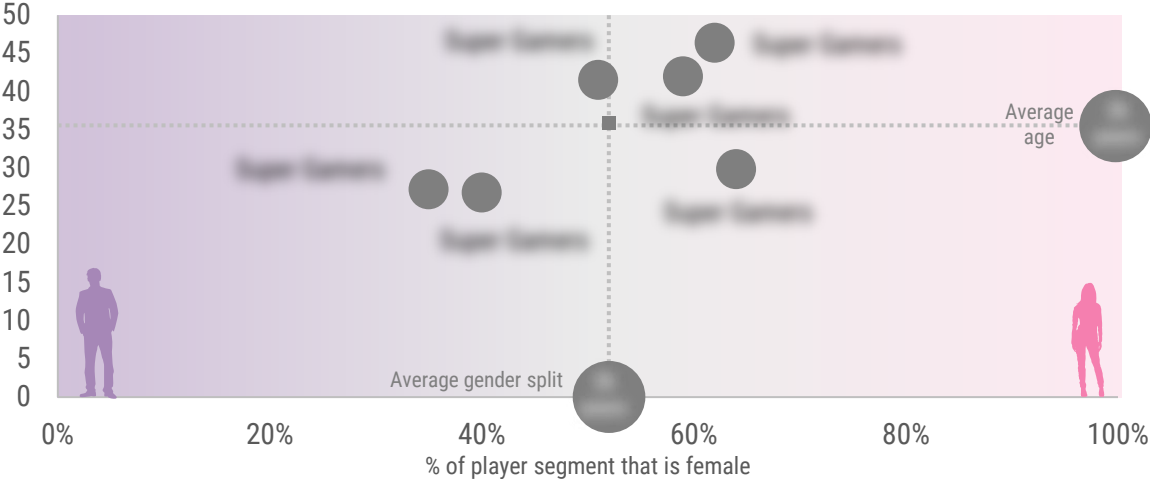
Averages similar to 2022 with small shifts in segments

The most notable shift has been among Transitional and Easy Accessors, which saw an increase in female gamers of 8% and 11%, respectively. The average age of gamers remains unchanged in the total population, at only 37 years from 2022, but the average age of Daily Dabblers has shifted up 3 years. This due to more Daily Dabblers and Incidental Players moving into Easy Accessors.

Average Age  
of Segment

## Segment Age & Gender

U.S. Gamers, Age 2+, 2024



## Key observations

Segments associated with more casual play - Super Gamers and Console Warriors - continued to show stronger and more male than the broader gaming audience.

Transitionals have shifted closer to the market average in 2024 in age and especially gender, as gamers have moved away from less involved formats such as Daily Dabblers and Incidental Players.

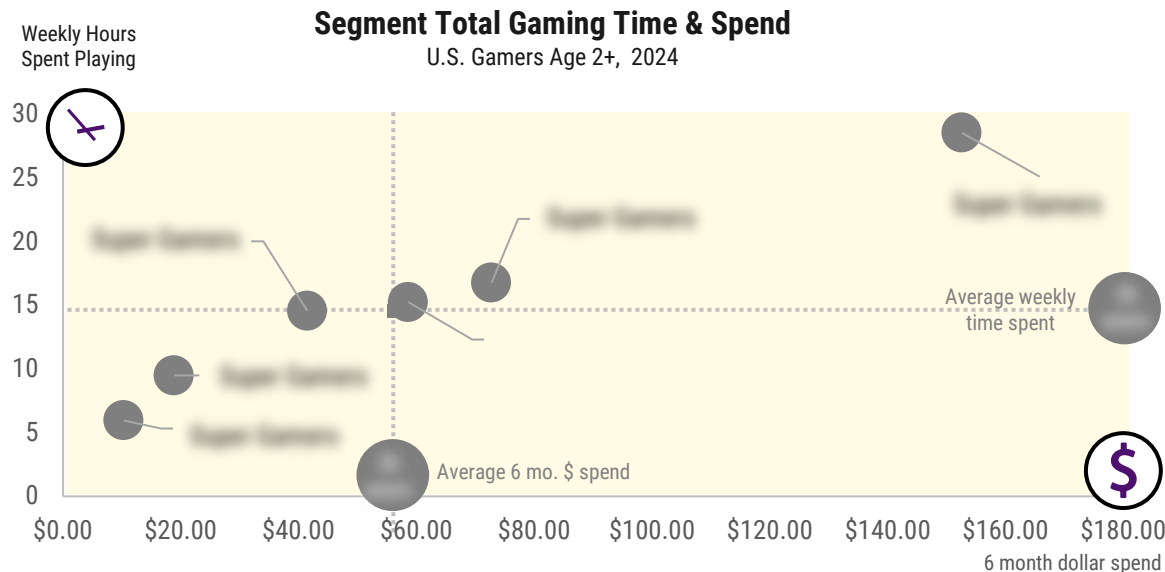
	Super Gamers	Console Warriors	Transitionals	Easy Accessors	Daily Dabblers	Incidental Players
% of Gamers	16%	15%	15%	16%	14%	23%
U.S. Market Size (M)	38.3	35.6	36.6	37.8	34.1	55.1
Final report includes % changes for significant shifts						
Demographics						
Avg. Age	XX	XX	XX	XX	XX	XX
% Female	XX	XX	XX	XX	XX	XX
% Male	XX	XX	XX	XX	XX	XX



# Segment Gaming Investment

Play time is flat or up for every segment, but only Console Warriors report spending more

The top investment groups, Super Gamers and Console Warriors, both made an increase in dollar spend of over 100% each on average, with Super Gamers's also up by half on time spent. The other three segments spent a lower dollar amount, but all reported an increase in time spent. Super Gamers' reported dollar spend is the only one above \$100 per month.



## Key observations

**Super Gamers** are the segment with the strongest growth in investment over 2022, adding 1.8 hours of weekly play and \$6. This additional spend over the six-month period. The \$60 bill about of 2022 gamers' height but represents a strong increase from 2022.

**Console Warriors** have also increased their weekly time spent, getting up to 1.8 hours, but their spending decreased by \$6.40 over the same period, a change of 3% in reported spend since 2022. This change is more notable in spend compared to Console Warriors.

**Easy Accessors** are the only other segment who reported an increase in weekly gaming up to 10 minutes in weekly play since 2022. However, the most other segments reported an increase in spend to \$1.20 versus 2022.

	Super Gamers	Console Warriors	Transitionals	Easy Accessors	Daily Dabblers	Incidental Players
% of Gamers	16%	15%	15%	16%	14%	23%
U.S. Market Size (M)	38.3	35.6	36.6	37.8	34.1	55.1
Final report includes % changes for significant shifts						
Gaming Investment						
Avg. 6-month spend	XX	XX	XX	XX	XX	XX
Avg. weekly time	XX	XX	XX	XX	XX	XX



The Circana Gamer Segmentation Report, 2024. Rates are based on self-reported use of the device to play a video game in the past month. Percentages reported in 8pt. color reflect difference in reported usage between 2022 and 2024 – green denotes an increase in reported usage, pink denotes a decrease in reported usage..

# Super Gamers

The industry's most valuable consumers

Report includes  
detailed profiles for  
every gamer segment

## Profile Summary

**Deeply invested in gaming, these players play heavily across multiple platforms and spend significant amounts of money on their gaming hobby.** Their interest in games extends beyond playing to include broader games media/culture, video game streaming, and esports.

**Demographic Typifier:** Teens to younger adult males (18 to 34)

**Gaming Habits:** heavy players and spenders across multiple platforms, most Super Gamers play on more than 1 platform.

**Gaming Motivations & Preferences:** enjoy a broad range of experiences and tailor their play to platform strengths. Strongly motivated by goals, such as becoming more powerful and completing all content.



Play a mix of casual, mid-core, and core experiences. Enjoy platform's flexibility and convenience.



Play immersive experiences such as RPGs, Action Builders, and Strategy/Simulation. Enjoy the platform's customizability both in hardware and input options.



Play action-oriented experiences such as Action, Shooters, and Fighting. Enjoys playing console due to exclusive games and casual room setting.





# Super Gamers

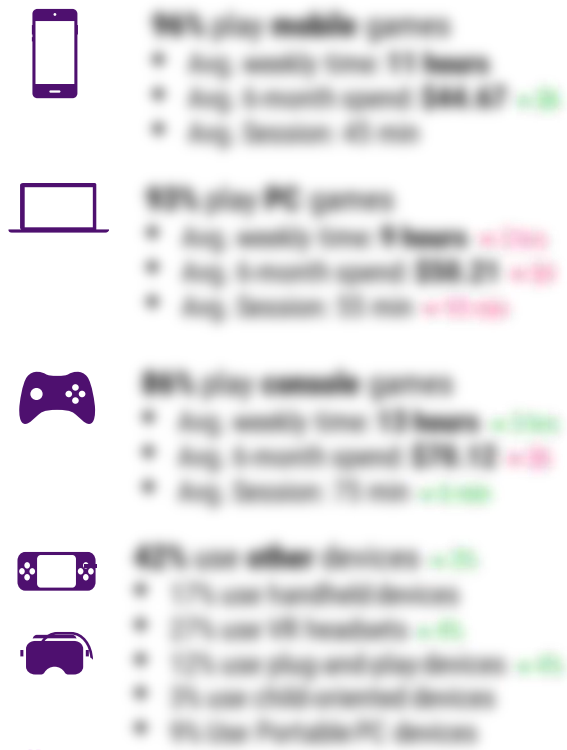
The industry's most valuable consumers

Report includes  
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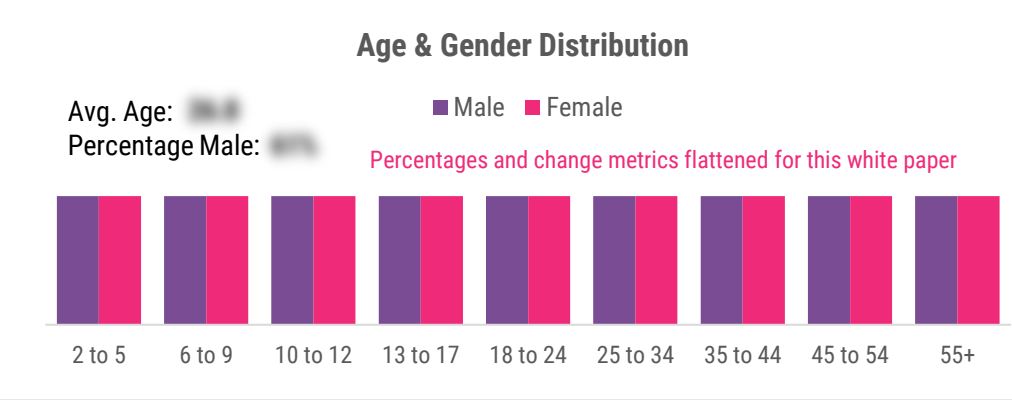
## Gaming Device Summary

97% use multiple device types – 81% use 3 or more  
Play and spend heavily across devices used



## Demographics

Younger and more male than the average gamer  
Likely to be teen males and younger adults (13 to 34)



What percent of demographic audience is in segment?

	2 - 5	6 - 9	10 - 12	13 - 17	18 - 24	25 - 34	35 - 44	45 - 54	55+
Male	XX%	XX%	XX%	XX%	XX%	XX%	XX%	XX%	XX%
Female	XX%	XX%	XX%	XX%	XX%	XX%	XX%	XX%	XX%

## Who they are

Deeply invested in gaming, these players play heavily across multiple platforms and spend significant amounts of money on their gaming hobby. Their interest in games extends beyond playing to include broader gaming media/culture, video game streaming, and esports.

- **Demographic Typifier:** preteen/teen males to younger adults (18 to 34)
- **Gaming Habits:** heavy players and spenders across multiple platforms, most Super Gamers plays on more than 1 platform.
- **Gaming Motivations & Preferences:** enjoy a broad range of experiences and tailor their play to platform strengths





# Appendices



# Circana Genre System – Mobile



Circana classifies genres from core to casual based on how accessible and broadly appealing their experiences are.

**Casual Games** are broadly appealing, highly accessible experiences that require minimal investment and skill to play successfully.

**Mid-core Games** fall on the spectrum between casual and core. They require some time and investment, but stakes are lower, and activities may be more relaxed and sociable.

**Core Games** are more niche in their appeal, requiring greater investment, focus, and skill to meaningfully participate.

Genre	Sub-genres	Description/Examples
Puzzle	Matching	Match-3, Bubble Shooters, Block / Tetris
	Word & Number	Crosswords, Sudoku, Scrabble, Threes
	Hidden Object	Locate specified objects in a series of images
	Physics Puzzle	e.g. Angry Birds, Where's My Water?, Paper Toss
	Quiz / Trivia	e.g. Trivia Crack, Heads Up!, Jeopardy
Arcade	General Arcade	Classic arcade games, "Fever" games, Platformers
	Endless Runner	e.g. Jetpack Joyride, Minion Rush, Temple Run
	Music / Rhythm	Tap, swipe, or otherwise react in time with the music
	Location-based	e.g. Pokémon GO, Ingress
Skill & Chance	Skill & Chance (Non-Casino)	Familiar board, card, dice, and tile games e.g. Monopoly GO
	Casino – Chance	Chance-based casino games, e.g. Slots
	Casino – Skill	Skill-based casino games, e.g. Poker, Blackjack
	Casino – Integrated	Games featuring a variety of casino games
Simulation	Simulation	Simulate a social environment or role e.g. Stardew Valley
	City Builder	Simulate building a city or farm (no combat elements)
Strategy	General Strategy	Focus on skillful planning & tactical thinking
	Combat City Builder	Build a city & army, e.g. Clash of Clans
	Trading Card Game (TCG)	Mimics a traditional strategic tabletop card game e.g. Marvel Snap
	Tower Defense	e.g. Clash Royale, Plants vs. Zombies, Bloons TD
Narrative/RPG	Classic RPG	Mimic HD RPG experiences, e.g. Final Fantasy ports
	Collectible Battle RPG	RPGs with collection mechanics, e.g. Summoners War
	Narrative	Story-driven games without combat
Action	Shooter – General	First-person, Third-person, Arcade, Vehicular
	Shooter – Battle Royale	Players compete to be the last person standing e.g. Fortnite
	Action & Fighting	Action RPGs, 2D or 3D fighting games e.g. Genshin Impact, Diablo Immortal
	Action Builder	Explore, craft, and build, e.g. Minecraft, Terraria
Other	Racing	Racing simulators, drag racers / arcade racers
	Sports	Simulate sports gameplay or sports team management



# Circana Genre System – PC/Console



Circana classifies genres from core to casual based on how accessible and broadly appealing their experiences are.

**Casual Games** are broadly appealing, highly accessible experiences that require minimal investment and skill to play successfully.

**Mid-core Games** fall on the spectrum between casual and core. They require some time and investment, but stakes are lower, and activities may be more relaxed and sociable.

**Core Games** are more niche in their appeal, requiring greater investment, focus, and skill to meaningfully participate.

Sub-genres	Description/Examples
Puzzle	Matching, Word/Number, Hidden Object, etc. e.g. Tetris
Skill & Chance	Familiar board, card, dice, and tile games, e.g. Solitaire, FreeCell
Arcade	Classic arcade games, clicker games, SHMUPs e.g. Pac-Man
Platformer	Maneuver/jump along a 2D or 3D plane, e.g. Super Mario Bros.
Racing	Racing simulations or kart games, e.g. Forza, Mario Kart
Simulation	Simulate a social environment or role, e.g. The Sims, Animal Crossing
City Builder	Simulate building a city, farm, or world, e.g. SimCity, RollerCoaster Tycoon
Narrative	Story-driven games without a combat focus, e.g. Myst, Life is Strange
RPG	Focus on character progression, e.g. Monster Hunter, Skyrim, Dark Souls
MMORPG	Massively multiplayer online role-playing games, e.g. World of Warcraft
Strategy	Focus on skillful planning & tactical thinking, e.g. Civilization, XCOM
Trading Card Game	Mimics a traditional strategic tabletop card game, e.g. Hearthstone
MOBA	Team-based, multi-player arena games, e.g. League of Legends, Dota 2
Action Builder	Emphasize exploration, crafting and building, e.g. Minecraft, Valheim
Action	Focus on active exploration and combat, e.g. Assassin's Creed, GTA
Fighting	2D or 3D fighting games, e.g. Mortal Kombat, Super Smash Bros.
Horror	Focus on frightening settings/story and survival gameplay e.g. Resident Evil
Shooter	Focus on gunplay, e.g. Call of Duty, Destiny, World of Tanks
Battle Royale	Players compete to be the last person standing, e.g. Fortnite, Apex Legends
Sports	Simulate sports gameplay or sports team management, e.g. Madden, NBA 2K





# Interested in the 2024 Gamer Segmentation Report?

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