July 2024

How consumers engage with games today

Newzoo’s Global Gamer Study 2024

Table of contents

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Introduction

Gaming remains a vital pillar of the media and entertainment landscape. **Millions of players across generations** turn to games to unwind, connect, and express themselves. While the ecosystem may be more competitive than ever, many gamers are still eager for new experiences.

The question is, **how do you identify and reach your optimal gaming audiences?**

That's where the Global Gamer Study comes in. Our consumer insights platform gathers **attitudinal and behavioral data** from gamers worldwide to provide the most complete map of gamers.

The Global Gamer Study surveys over 73,000 consumers across 36 markets every year to provide insight into gaming trends, player behaviors, and spending patterns. This free preview includes key findings into who's playing and paying for games today, which players engage the most, and **how to identify your most potential audiences.**

Understanding what drives people to play and pay for games and what keeps them hooked can open opportunities. That's why **we focused on motivations for our 2024 wave of consumer survey data**, to help Global Gamer Study users identify the most exciting and lucrative player segments.

Want to know how Newzoo's consumer insights can help you address industry challenges? Talk to us about subscribing to the Global Gamer Study for a more in-depth exploration. For now, happy reading.

Alexis Pamboris
Research Director

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Head of Consumer Insights

Key takeaways

1

80%

of consumers across the world play video games

Across the world, 85% of consumers engage with games in one form or another, with 80% playing, 64% viewing, and 35% engaging in other ways (like joining online gaming communities or creating content).

Gen Alpha and Gen Z gamers are the most engaged. Over 90% of these younger consumers engage with games, with 86% of Gen Z consumers playing games in the last 12 months.

2

≧$25/month

is how much 22% of console and 15% of PC players spend on average

PC or console gamers are, on average, higher spenders than mobile gamers. More than half of PC or console gamers spend between $5 and $25 on gaming per month, with a significant share of those spenders paying $25 or more per month.

PC or console players are more likely to engage with pay-to-play (P2P) games than mobile players. Over a quarter of console players mostly or only play P2P games.

3

31%

of PC or console players often seek out new or trending games

Even though playtime is declining, and fewer titles and studios take a large share of engagement and revenue, there are still players around the world hungry for the next big thing in gaming.

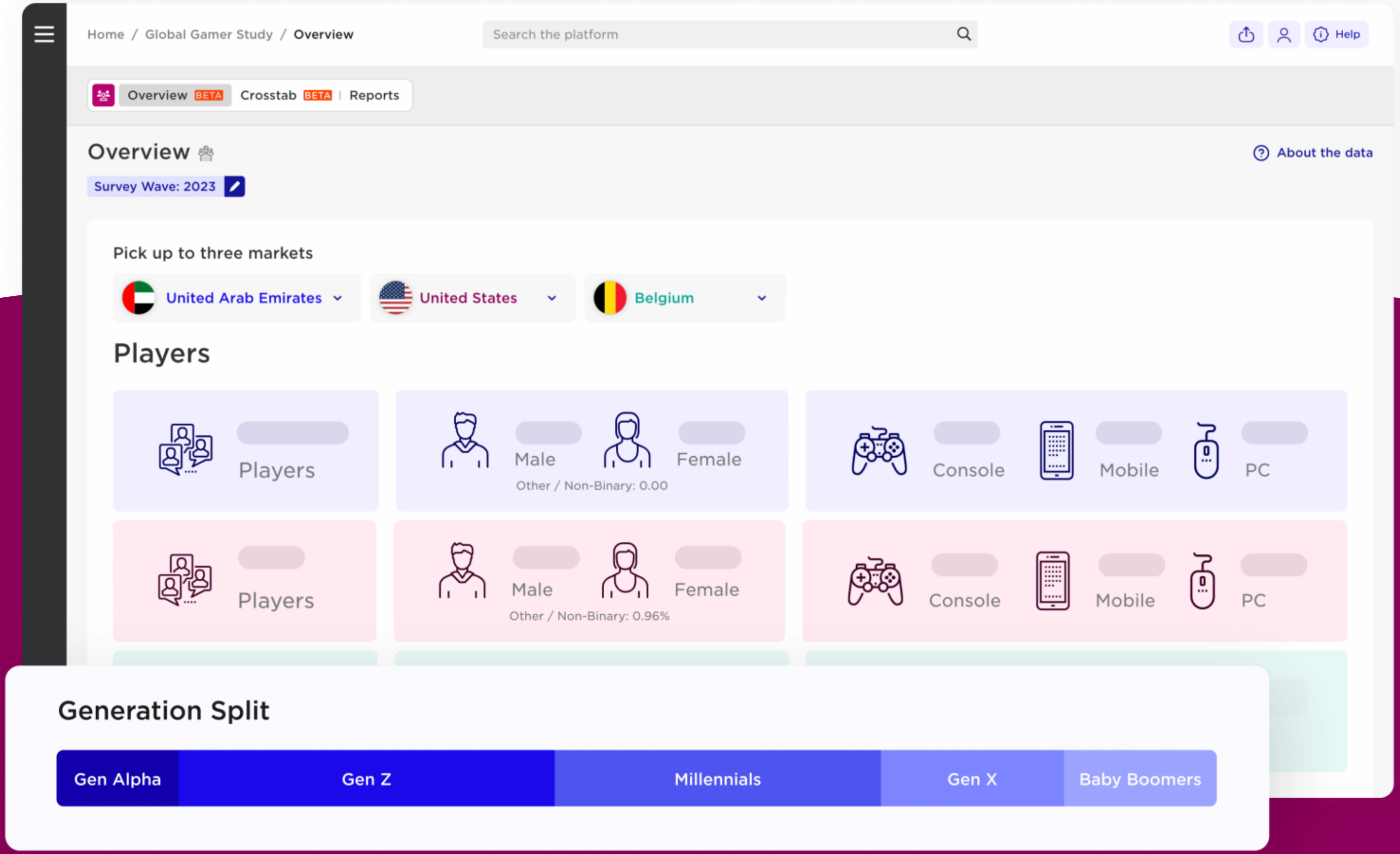
Nearly a third of PC or console players frequently look for new, trending games, and over 80% of this representative group spends money on games every month.

These trend seekers may very well be the most valuable audience for your new game.

Written by Newzoo's Gamer Research Team
Powered by our Global Gamer Study

This report draws from and gives context to the new wave of data in Newzoo's Global Gamer Study.
Dive deeper into the study to understand gamers and what motivates them on a whole new level.

Find out more



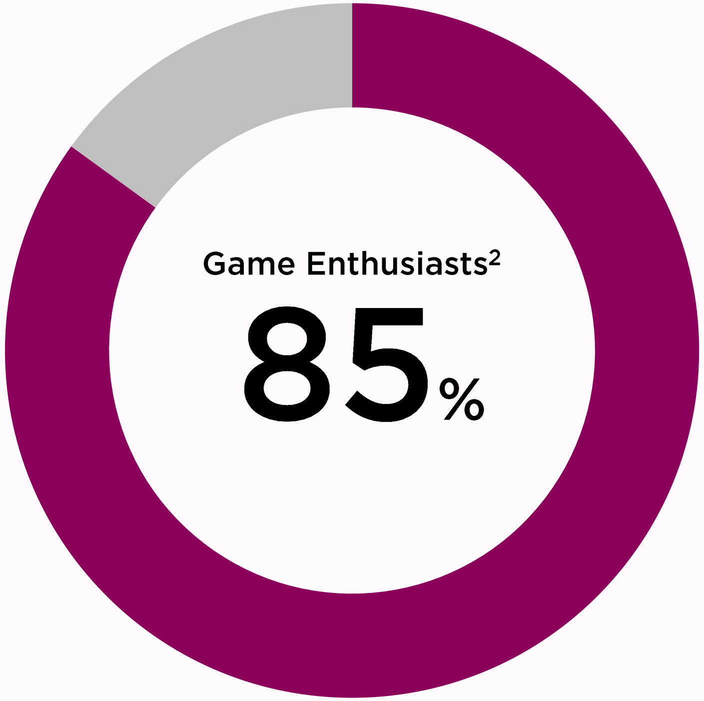
Gaming engagement today

Insights into gamer generations, preferred genres, and engagement outside play

80% of consumers play video games

Gaming engagement

Base: Total online population[1]



Ways to engage with gaming:

Play games
80%

View gaming content
64%

Engage other ways[3]
35%

[1] Aged between 10-65/10-50 (regional coverage and age scope differ by market)
[2] Game Enthusiasts are consumers who engage with gaming through playing, viewing, owning, and/or social behavior
[3] Other engagement includes those who have "often" followed video gaming channels or esports broadcasters, socialized/visited online gaming communities, discussed video games with family and friends, listened to gaming podcasts, and/or attended large in-person gaming conventions in the past 12 months

Video games are a more prominent media and entertainment force than they've ever been.

Across more than 73,000 consumers worldwide, **85% engage with games in one way or another, and 80% play them**. Nearly two-thirds of consumers view gaming content, and over a third engage in other ways.

The fact that more than a third of consumers engage in other ways, including discussions, podcasts, conventions, and esports fandom, **shows how significant gaming has become as a cultural touchstone**.

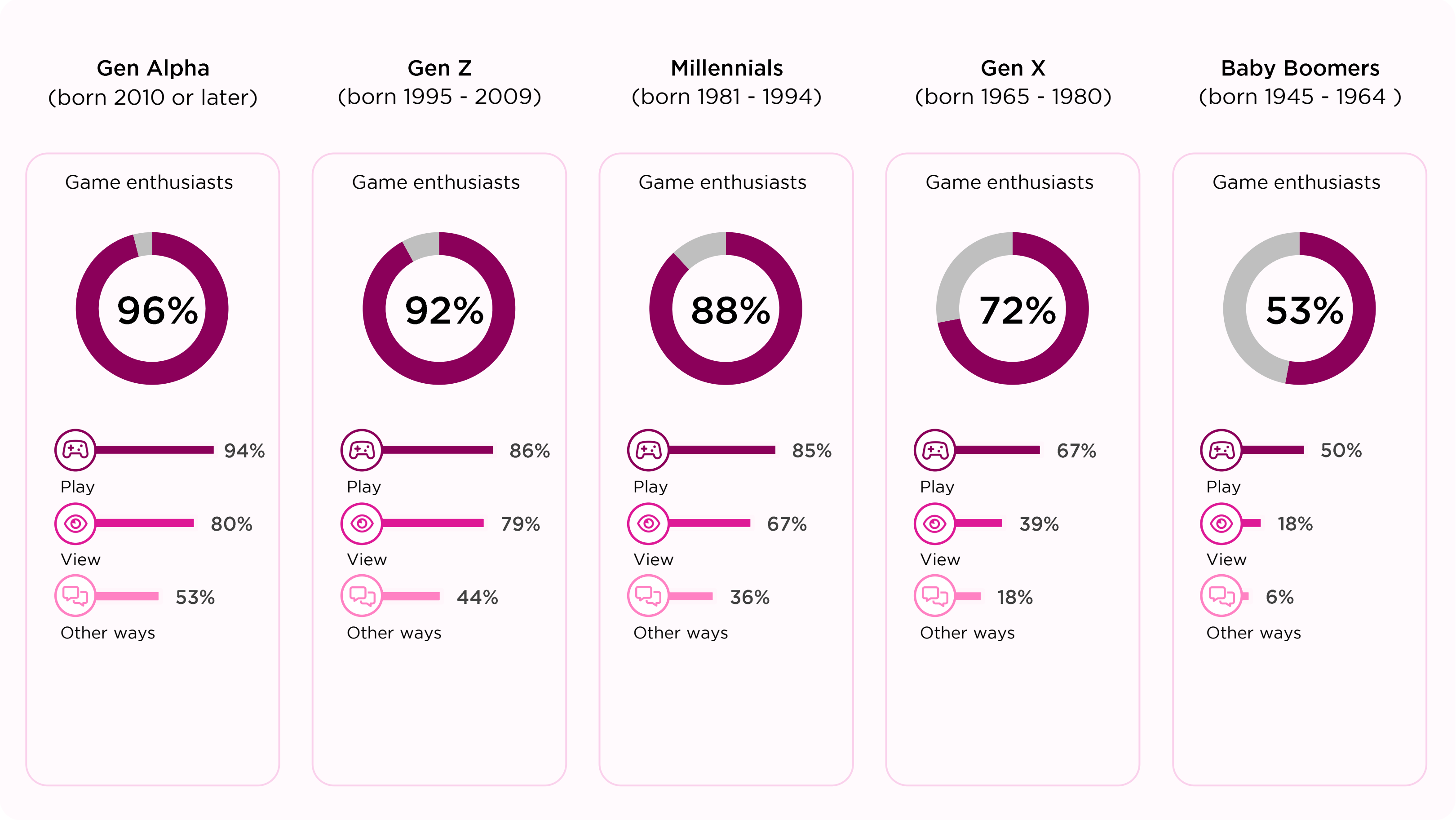
Reaching players nowadays means more than providing a playable experience. It means engaging with them across many dimensions.

Game Enthusiasts: Consumers who play, view, own, and/or engage with games in ways beyond these dimensions.

Over 90% of Gen Alpha and Gen Z consumers engage with video games

Gaming engagement by generation

Base: Total online population



94% of Gen Alpha and 86% of Gen Z game enthusiasts play games and will likely keep playing.

Game enthusiasts across every generation prefer to play games over other types of engagement, and that holds true for younger generations as well.

The digital-first or digital native generations (Gen Z and Gen Alpha and, to a point, Millennials) interact with games in more diverse ways than older game enthusiasts. They are also more likely to play, to begin with, and especially more likely to view gaming content.

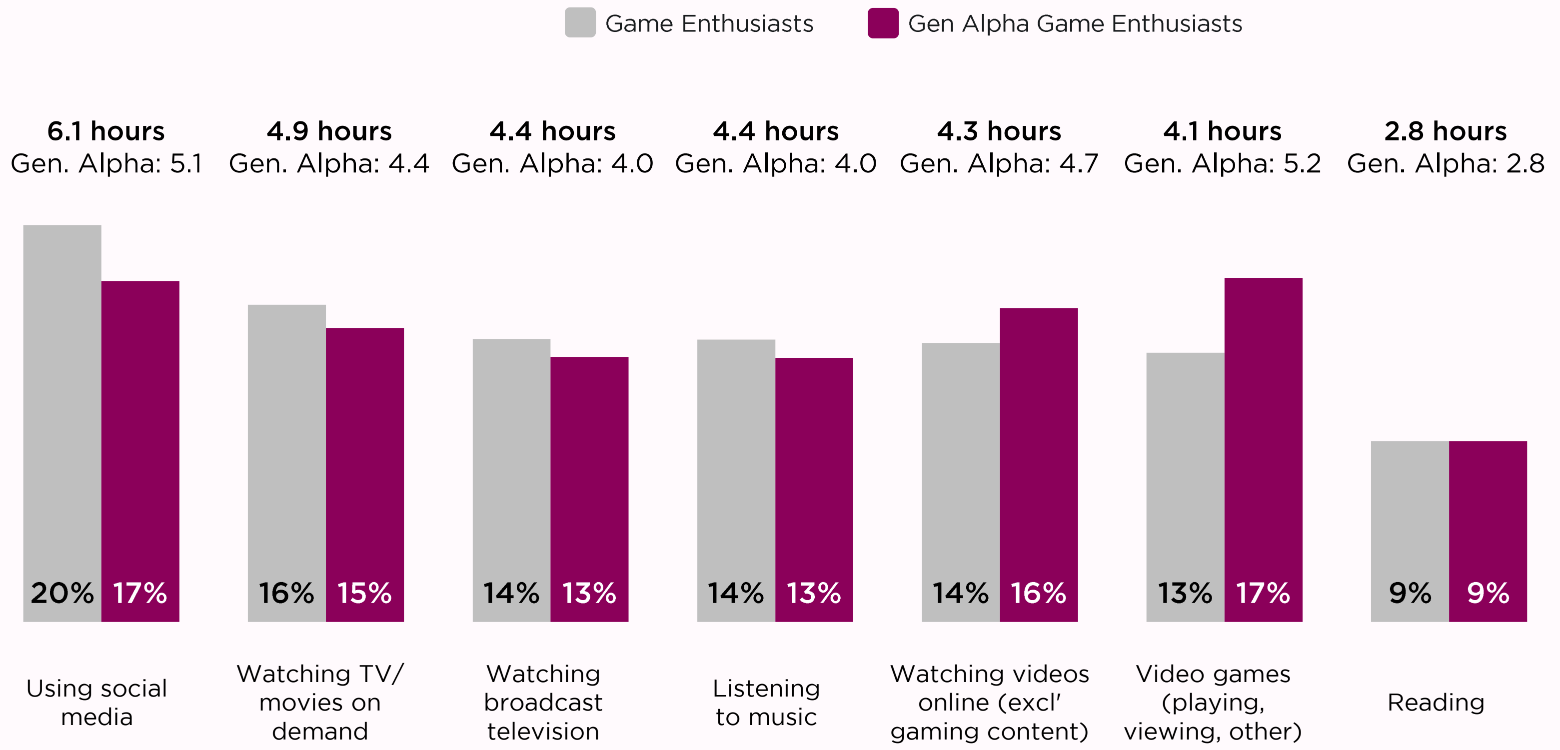
For these younger consumers, gaming is woven into their everyday lives. They are likely to **continue to play and engage with games as they grow up**, similarly to how they do now, representing a significant opportunity for game makers.

Source: Newzoo Global Gamer Study 2024 (Global weighted average across 36 markets)
Q. Game Enthusiasts, Total players (past 6 months), Gaming video content viewers (past 12 months), Those who engage with gaming beyond playing/viewing in the past 12 months (% often). Base: Gen Alpha (n=6,622), Gen Z (n=25,059), Millennials (n=21,988), Gen X (n=15,655), Baby Boomers (n=3,769)

Gen Alpha game enthusiasts spend more time on games than social media

Share of leisure time spent engaging with media forms (average per week)[1]

Base: Game enthusiasts[2]



[1] This is not an exhaustive list of all Game Enthusiast's pastimes; we asked them to indicate the time shared across these pastimes only, hence the total equals 100%.

[2] Game Enthusiasts are consumers who engage with gaming through playing, viewing, owning, and/or social behavior

Game enthusiasts dedicate nearly as much leisure time to video games as they do to TV, films, and music.

Gen Alpha enthusiasts, however, **spend more time engaging with games than every other activity**, including social media.

These younger consumers spend an average of 5.2 hours per week playing, viewing, and engaging with games, 0.1 more hours than on social media.

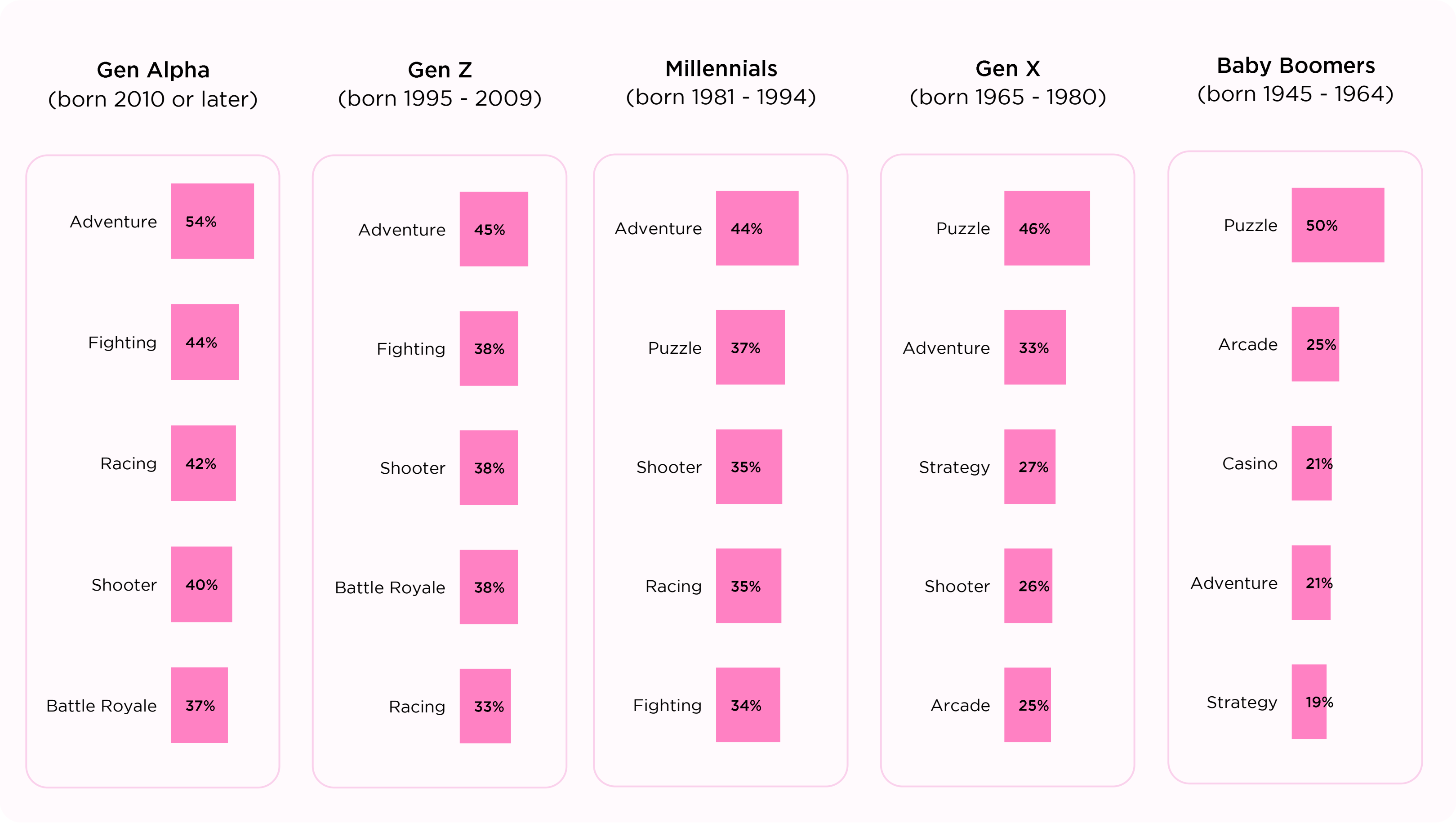
This underscores how gaming has become mainstream and, for each new generation that gets into gaming, **leads the way forward for media and entertainment culture**.

Source: Newzoo Global Gamer Study 2024 (Global weighted average across 36 markets)
Q. Leisure activities. Time spent per week. Base: Game Enthusiasts (n=61,248), Gen Alpha (n=6,622)

Adventure is the top genre among Gen Alpha, Gen Z, and Millennials

Top genres by generation

Base: Total people who played games on any device (past 6 months)



54% of Gen Alpha players say that the Adventure genre is their favorite.

Gen Alpha and Gen Z players are **most likely to play Adventure, Fighting, Racing, and Shooter games**, while Puzzle titles appeal more to older generations of gamers.

Gen Z players who prefer Adventure titles are most likely to have played *Minecraft*, *Fortnite*, or games from the *Call of Duty* or *Grand Theft Auto* series in the past six months.

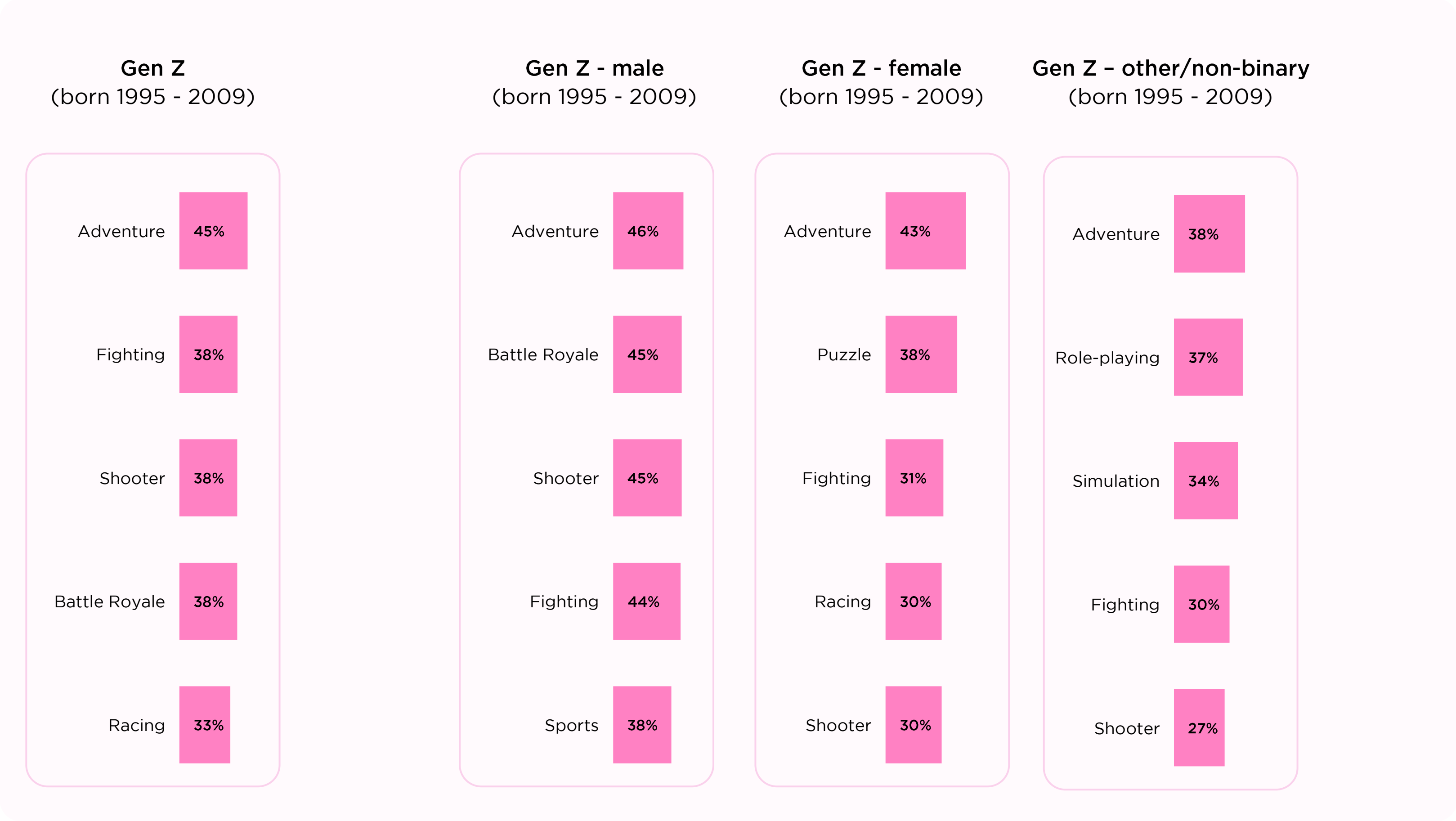
This gives you an idea of **the franchises currently captivating specific player groups** more than others.

Source: Newzoo Global Gamer Study 2024 (Global weighted average across 36 markets)
Q. Genres played on any device (past 6 months). Base: Gen Alpha (n=6,220), Gen Z (n=21,546), Millennials (n=18,197), Gen X (n=10,195), Baby Boomers (n=1,708)

Gen Z players of all genders enjoy Shooter and Fighting games

Top genres Gen Z plays, split by gender

Base: Total people who played games on any device (past 6 months)



37% of Gen Z players who identify as non-binary or in another way name Role-Playing games as a favorite genre.

Among Gen Z players, **Adventure is the favorite genre**, and when you split the generation by gender identity, you find more similarities than differences.

Adventure remains the favorite genre across gender identities, **with Fighting and Shooter games also making it to the top five.** The gap between the share of male, female, and other identities who prefer Fighting games, for instance, is not great enough to say that a new Fighting title should target only male players.

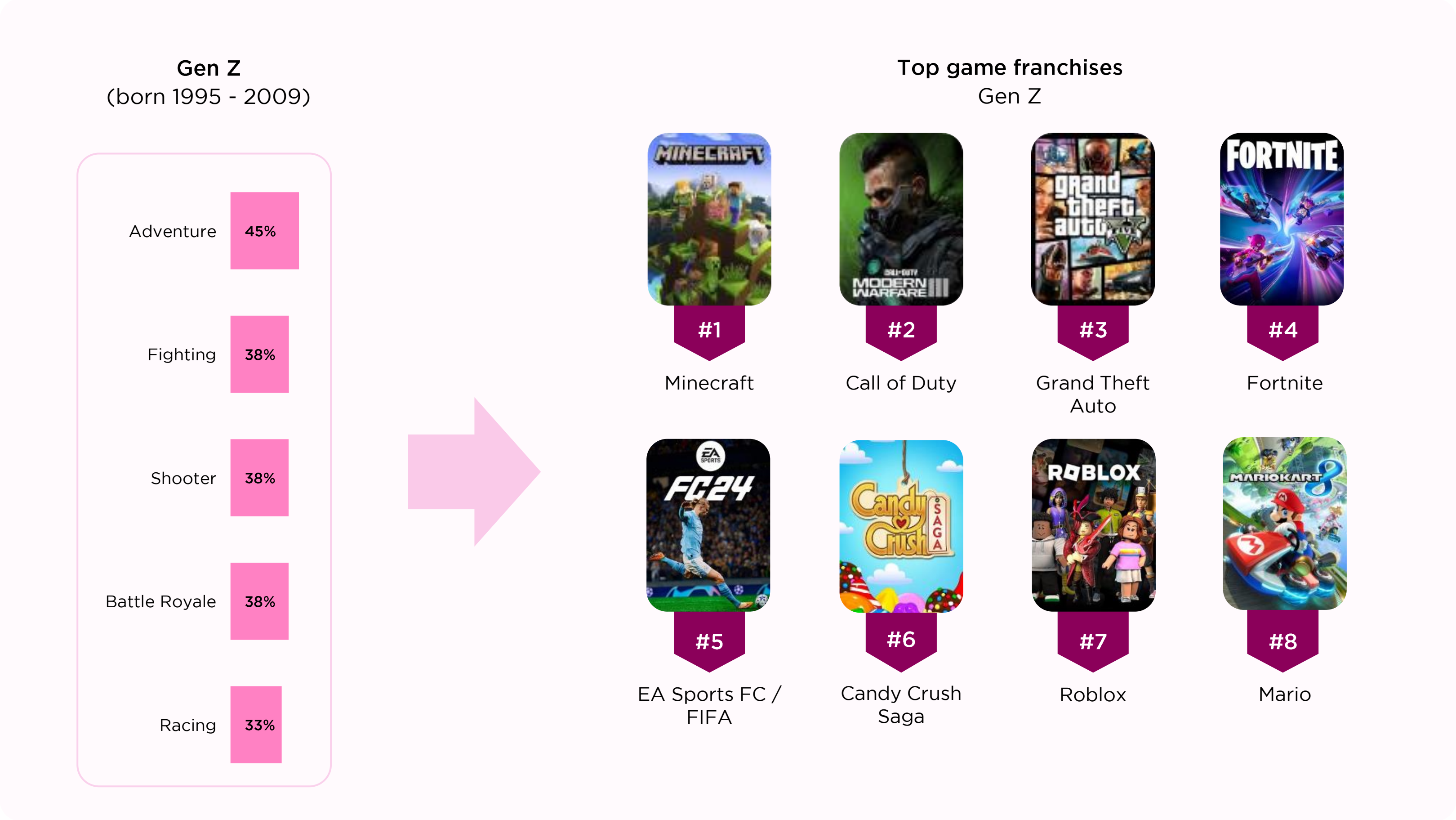
Most importantly, **the gender balance as it pertains to favorite genres becomes more balanced as you look at younger generations**.

Source: Newzoo Global Gamer Study 2024 (Global weighted average across 36 markets)
Q. Genres played on any device (past 6 months). Base: Gen Z (n=21,546), Gen Z male (n=11,345), Gen Z female (n=9,936), Gen Z – other/non-binary (n=265)

Minecraft and Call of Duty are the most popular franchises among Gen Z players

Top genres and game franchises Gen Z plays

Base: Total people who played games on any device (past 6 months)



Many of Gen Z's favorite franchises serve different needs and **transcend single genre definitions, with many modes, mini-games, and other side tasks**. Franchises that do fit squarely into one genre range from relatively serious adult-themed games to virtual playgrounds aimed at younger kids.

On this latter point, there are many factors at play: Gen Z comprises teens to people nearing 30 years old, which supports *Minecraft*'s inclusion on the same list as *Call of Duty* and *Grand Theft Auto* (to say nothing of their industry prevalence overall). Most likely, many Gen Z players are only digging into *Minecraft*, while others say *Call of Duty* or bust.

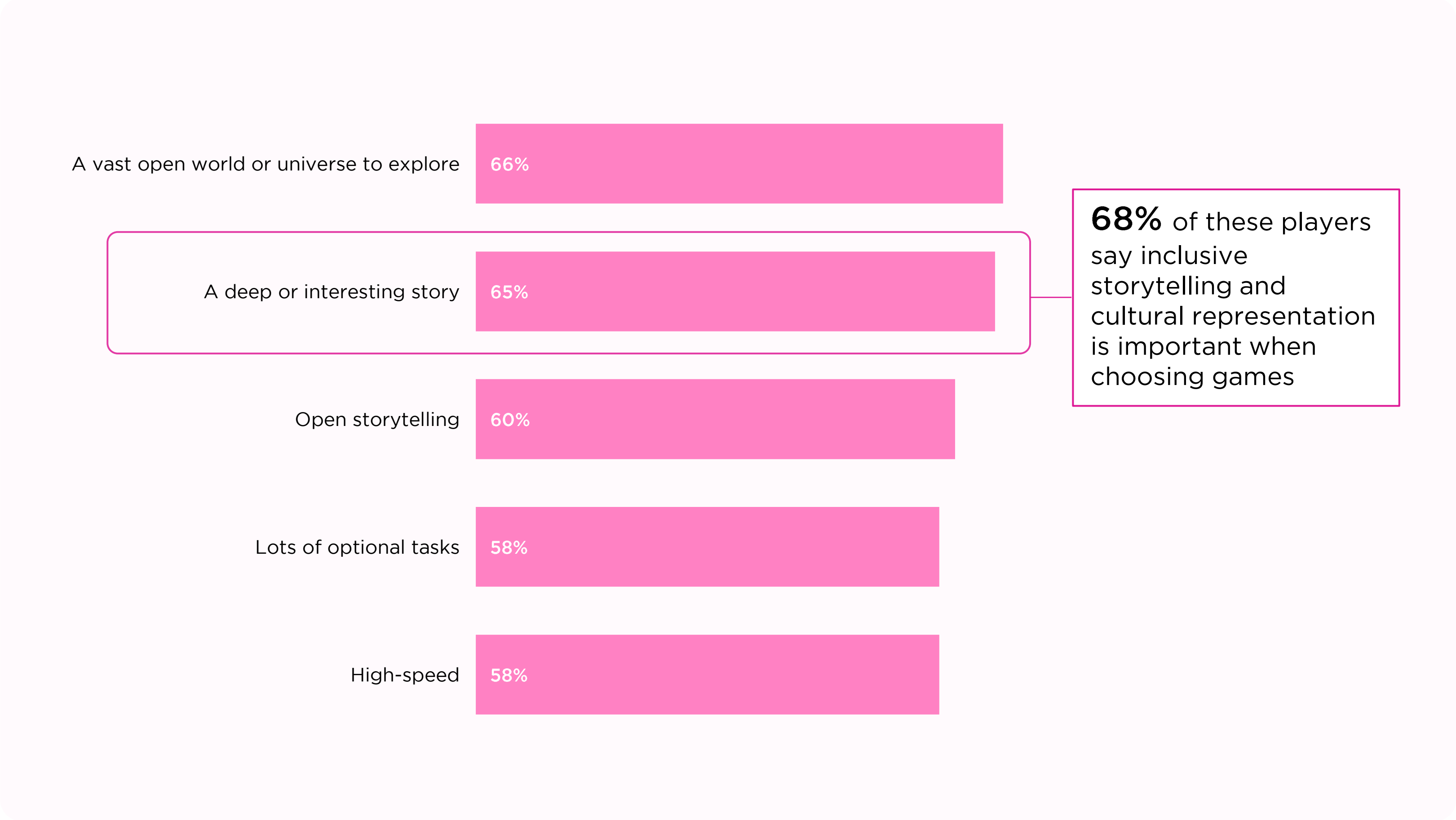
Despite this, **Gen Z's favorite games clearly showcase how important the social element is for these players**.

Source: Newzoo Global Gamer Study 2024 (Global weighted average across 36 markets)
Q. Genres played on any device (past 6 months). Base: Gen Z (n=21,546), Gen Z male (n=11,345), Gen Z female (n=9,936), Gen Z – other/non-binary (n=265)

Open worlds and deep storytelling are the most popular play motivators for PC or console players

Motivations for playing games

Base: PC or console players (past six months)



What motivates PC or console players beyond genre or franchise preference?

Vast open realms and engaging stories are currently the most popular motivators for playing games among PC or console players. **More than two-thirds of players who gravitate toward deep stories also value inclusive and representative storytelling** (with this share rising to 73% among more Gen Alpha players).

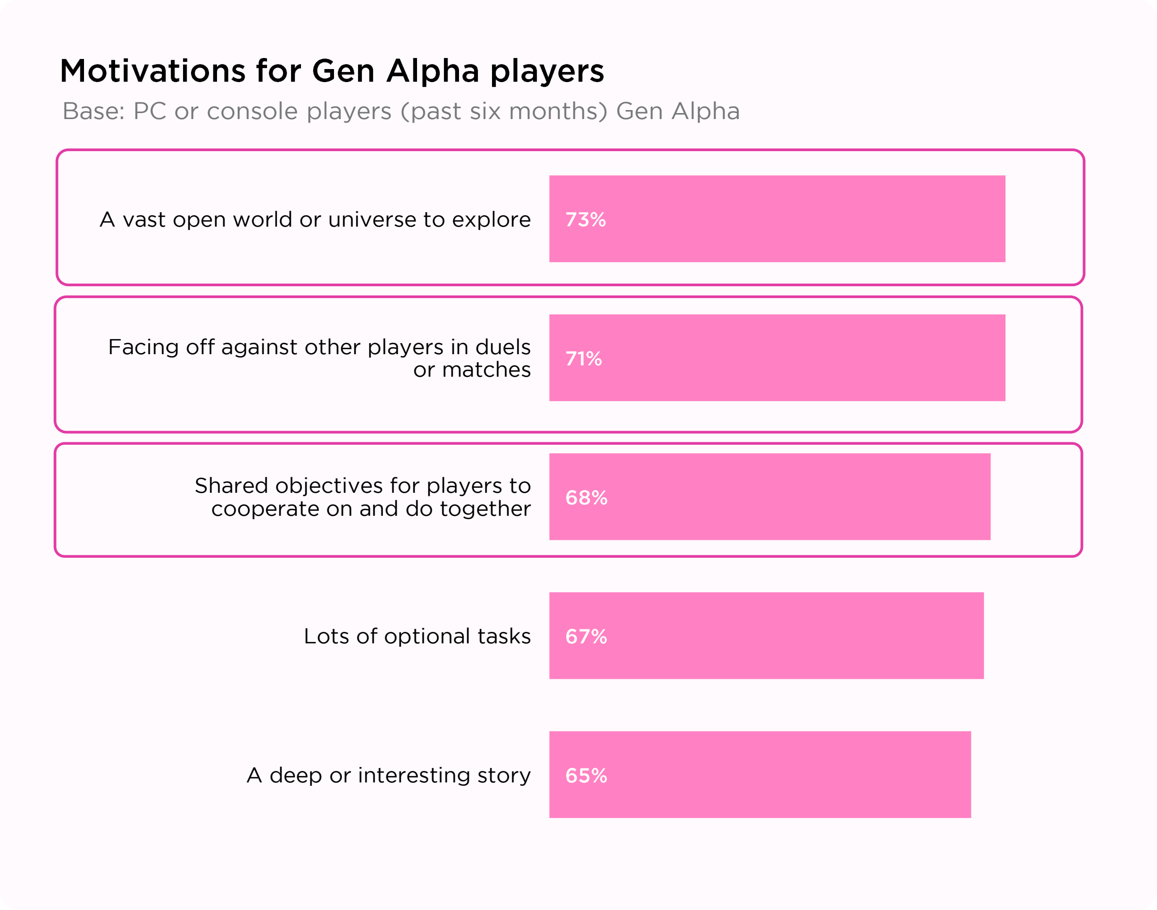
Games that offer these elements, whether via a true open world, narrative elements that suggest one, or choices that impact the story, already have huge potential audiences.

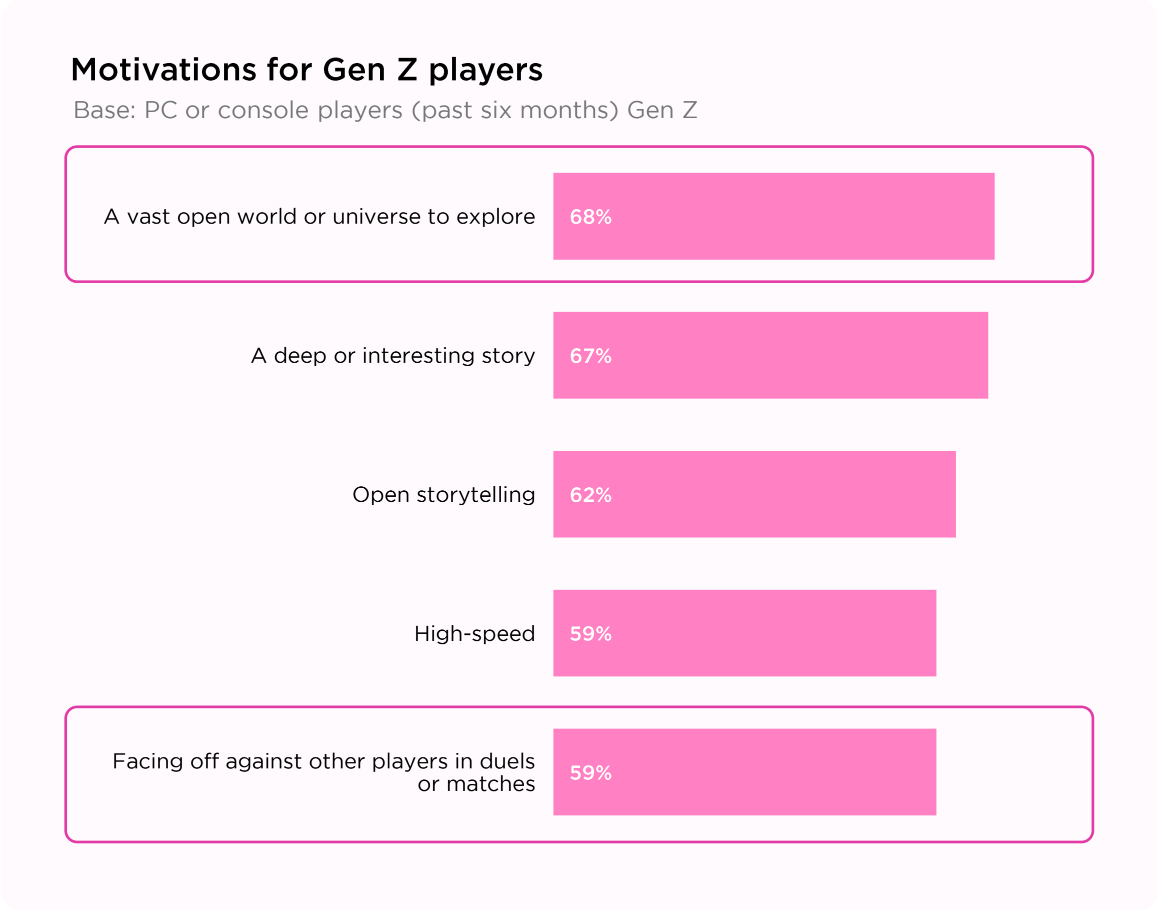
On the flip side, **over 50% of PC or console players were swayed by dueling one another and cooperating on shared goals** (especially younger players).

Not every game has to have a sprawling story or unique PvP mechanic, but it's clear that these types of motivations can help a game stand out in a crowded market (or at least survive).

Source: Newzoo Global Gamer Study 2024 (Global weighted average across 36 markets)
Q. Motivations for playing a game. Base: PC or console Players (n=38,417).
Q. Important aspects of video games (DEI). Base: PC or console Players who are motivated by a deep or interesting story (n=24,059).

Younger players are especially motivated by the competitive and cooperative social elements of gaming





Source: Newzoo Global Gamer Study 2024 (Global weighted average across 36 markets)
Q. Motivations for playing a game. Base: PC or console Players (n=38,417)

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Q. Motivations for playing a game. Base: PC or console Players (n=38,417)

Consumer playtime and spending

How PC and console gamers play and spend versus mobile gamers

PC or console players spend an average of 2.1 hours per day playing games

Spending time on games

Base: Total players

	Mobile	Console	PC
Play times (avg. days per week and avg. hours per week)	**3.4** days per week **5.4** hours per week	**2.6** days per week **5.4** hours per week	**2.7** days per week **5.7** hours per week
Hours spent each day playing (avg. hours per week by avg. days per week)	**1.6** hours per day	**2.1** hours per day	**2.1** hours per day

PC or console players are more dedicated than their mobile counterparts, as they generally spend more time playing games and tend to spend more money on gaming.

On average, **PC or console players spend 30 more minutes per day playing**, though they dedicate fewer days per week to this form of engagement.

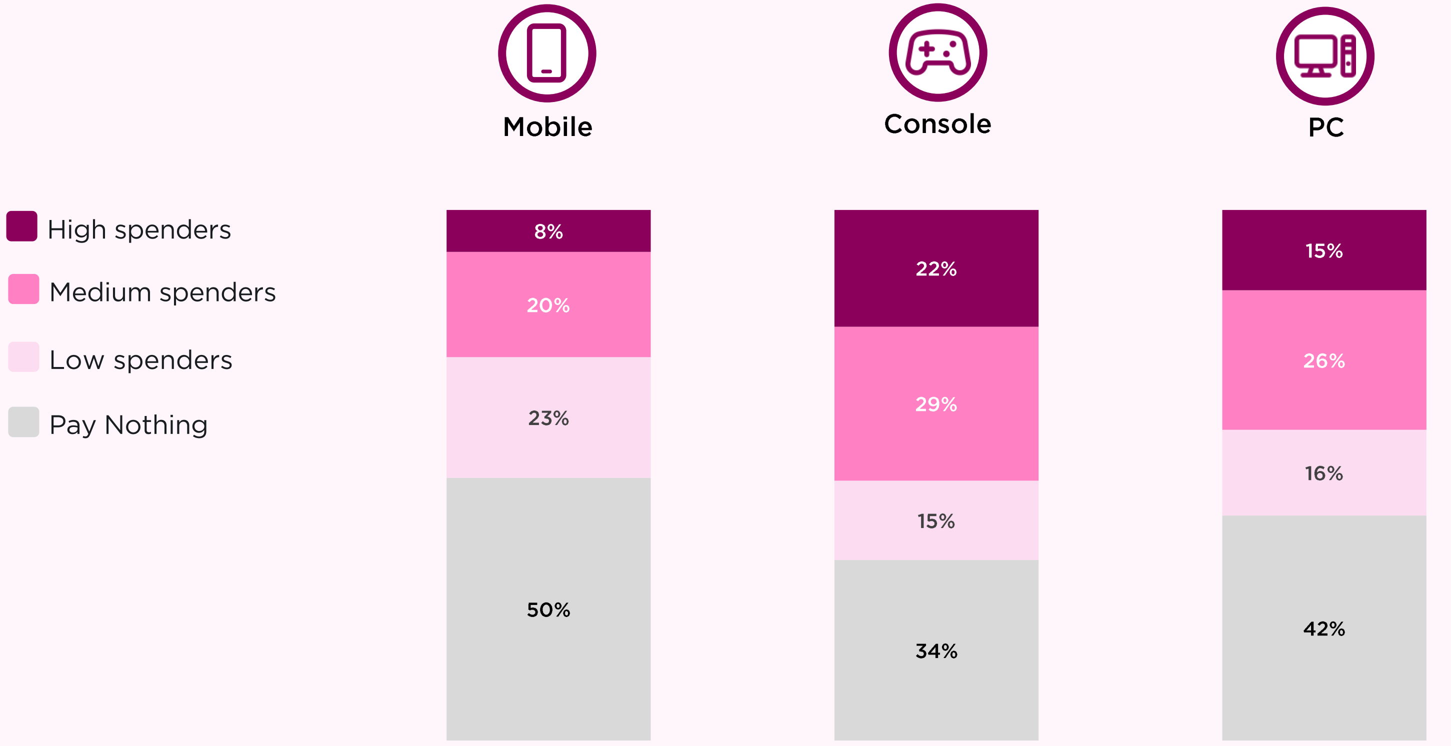
This suggests that PC and console playtime is more condensed to several longer sessions compared to the shorter engagement bursts of mobile gaming.

Source: Newzoo Global Gamer Study 2024 (Global weighted average across 36 markets)
Q. Days per week played, hours per week played for each platform. Base: Mobile (n=44,632), console (n=23,782), PC (n=26,289)

Just over 50% of console players are medium or high spenders

Spending money on games and in-game content

Base: Total players



[1] Payers are categorized into high, medium, low, or no spend relative to the amounts given by respondents in market, to ensure comparisons across markets can be made. The amount itself is the total of spend on games, DLC, MTX and other in-game purchasing. Low spenders spend up to $5 per month, medium spenders spend $5 to $25 per month, and high spenders spend more than $25 monthly on average.

22% of console players and 15% of PC players are high spenders: spending $25 or more on gaming per month.

PC or console players spend more on average than mobile players, with **PC gaming having the highest share of medium or high spenders**.

More than half of console players are medium or high spenders, **spending between $5 and $25 or more per month** on gaming-related purchases.

Each platform employs varying monetization methods. The type of players each platform attracts, though, and how they segment more specifically, also plays a key role in spending patterns.

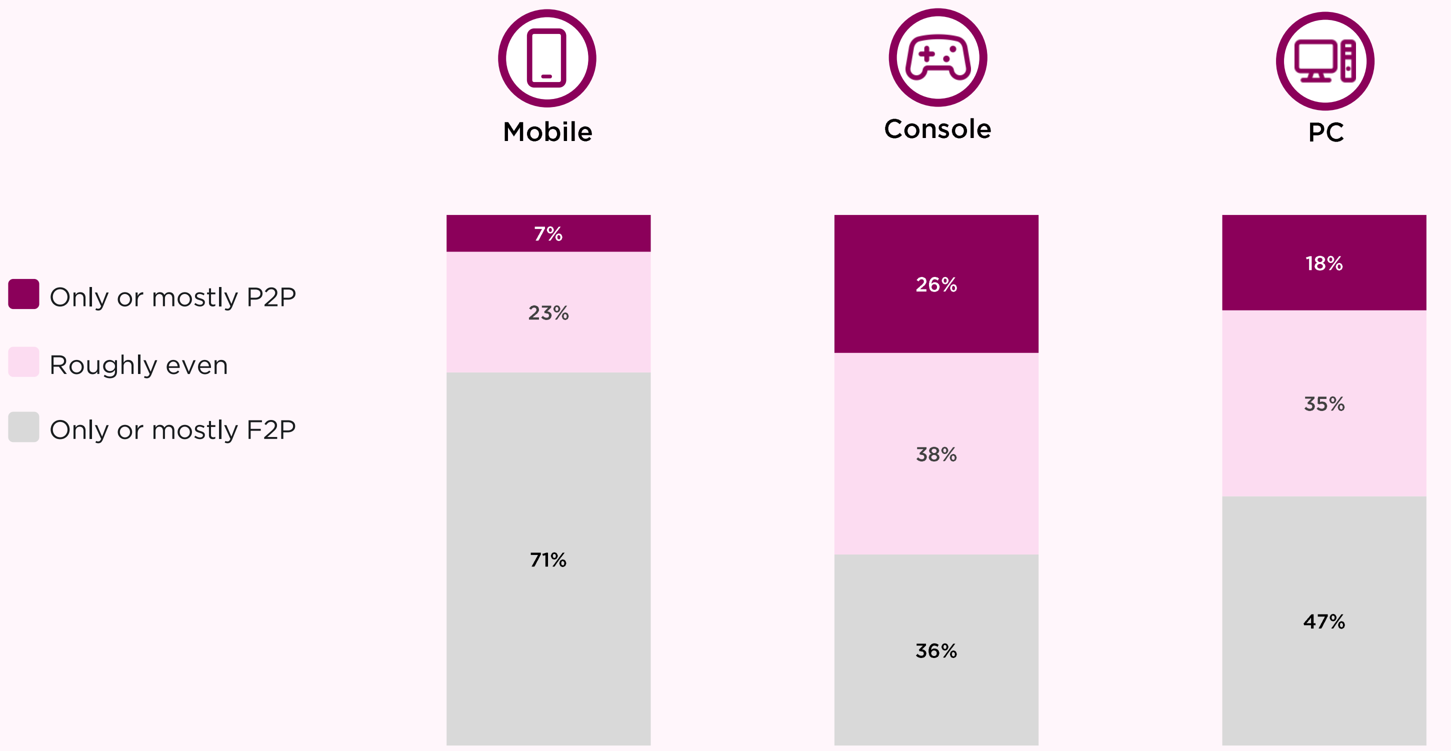
PC and console players are more likely than mobile players to spend on various combinations of **titles, DLC launches and content, microtransactions, and other in-game purchases**.

Source: Newzoo Global Gamer Study 2024 (Global weighted average across 36 markets)
Q. Amount paid and types of game played mostly or rarely (F2P/ P2P) on each platform. Base: Mobile (n=44,632), console (n=23,782), PC (n=26,289)

PC and console audiences expect to pay for their experiences and aren't discouraged by that investment

Spending money on games and in-game content

Base: Total players



[1] Payers are categorized into high, medium, low, or no spend relative to the amounts given by respondents in market, to ensure comparisons across markets can be made. The amount itself is the total of spend on games, DLC, MTX and other in-game purchasing. Low spenders spend up to $5 per month, medium spenders spend %5 to $25 per month, and high spenders spend more than $25 monthly on average.

Not only do PC or console players tend to spend more time and money on games than mobile players in general, but they also gravitate towards experiences that involve an initial investment.

PC or console players are more likely to play pay-to-play (P2P) games, with 26% of console players only or mostly playing titles with this business model.

In contrast, only 7% of mobile players only or mostly play P2P games, suggesting that consumers who prefer mobile are less willing to part ways with cash before they can start engaging with a game.

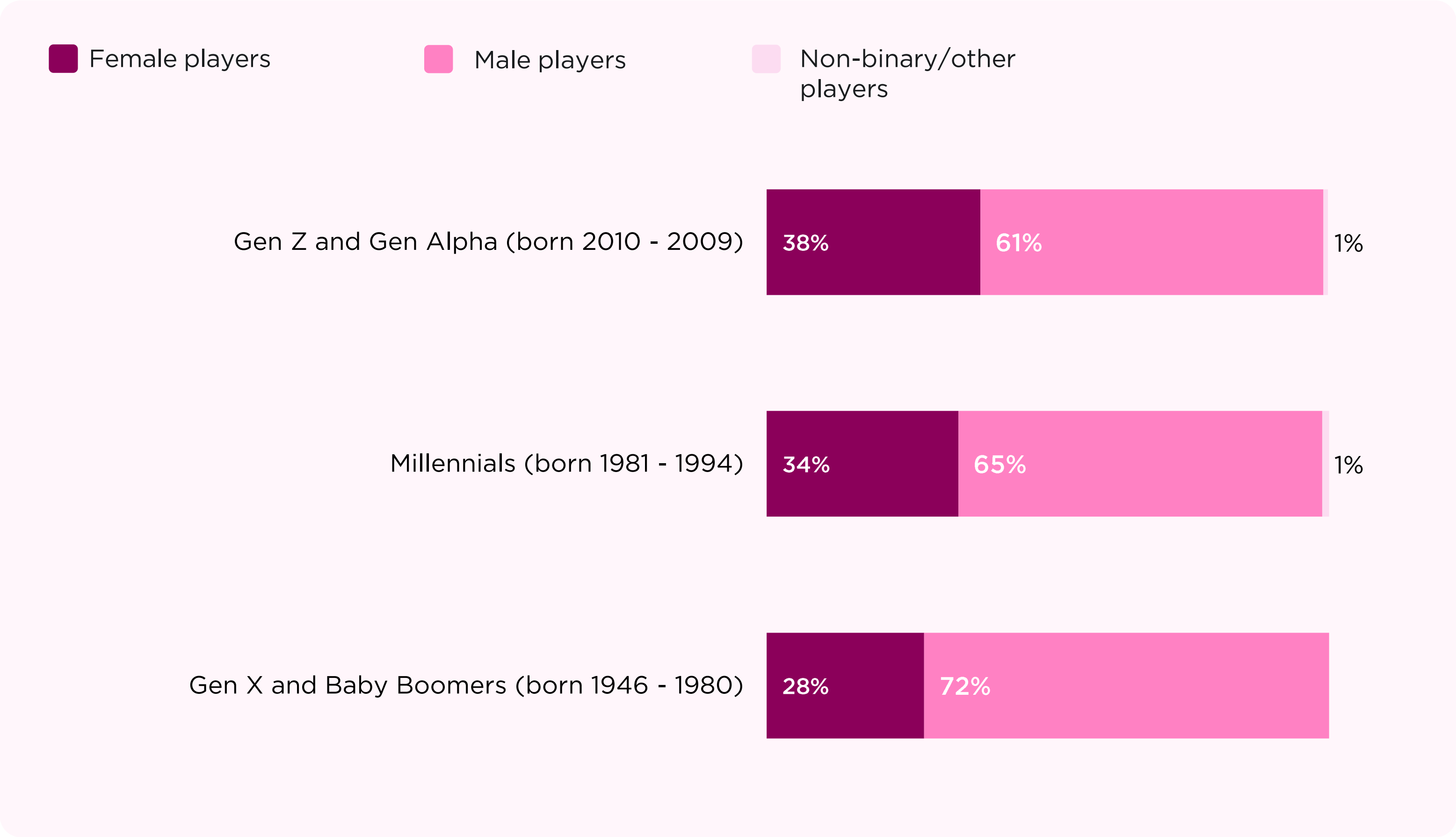
This shows that **PC and console audiences expect to pay for their experiences** and are less discouraged by financial barriers to entry.

Source: Newzoo Global Gamer Study 2024 (Global weighted average across 36 markets)
Q. Amount paid and types of game played mostly or rarely (F2P/ P2P) on each platform. Base: Mobile (n=44,632), console (n=23,782), PC (n=26,289)

Younger female players are more likely to pay and play than older female players

Percentage of players who mostly or only play P2P games by generation

Base: Total players



If you tunnel further into the 26% of players who mostly or only play P2P (pay-to-play) games, you find some valuable distinctions.

Younger generations tend to have higher shares of women and non-binary players opting to mostly or only play P2P games, while that distribution becomes more male-skewed among older gamers.

Gen Z, Gen Alpha, and Millennial female players are all more likely than older gamers to make that upfront investment on a boxed or downloaded game (or subscription).

This shows that paying audiences are growing more diverse with every passing gamer generation – gamers are less of a monolith than they've ever been, and **the profile of a long-term paying player will continue to expand**.

Source: Newzoo Global Gamer Study 2024 (Global weighted average across 36 markets)
Q. Amount paid and types of game played mostly or rarely (F2P/ P2P) on each platform. Base: Mobile (n=44,632), console (n=23,782), PC (n=26,289)

Finding opportunities in a challenging market

There are many players out there on the hunt for new, trending games

Only 66 games accounted for 80% of all playtime in 2023.

Gamers are clocking in fewer playtime hours on PC and console and the market faces considerable economic challenges. The good news is that there are still many players out there seeking new experiences, that “next big thing.”

31% of PC and console players globally say they often seek out and try new or trending games.

In the following slides, we show you who they are, what they play, and how to find them.

Over a third of new game seekers play on three platforms (and play more than seven hours per week on average)

Demographics and playing behavior of PC/console gamers who often seek out new or trending games

Base: Players stating their favorite platform is PC or console

Gender split and age

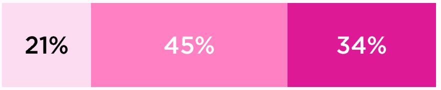
62%

1%: Other/ non-binary

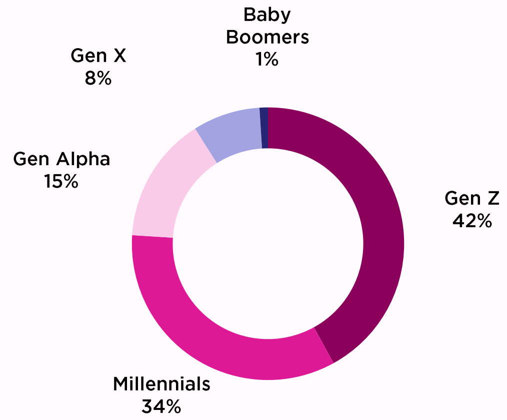
37%

Ave. age: 27.4

Number of platforms used



Generation split



Platforms used (last 6 months)

72% Mobile

67% Console

75% PC

Weekly play hours

7.4 Mobile

7.2 Console

7.1 PC

42% of PC or console players who seek out new and trending games are Gen Z.

If you treat the 31% of PC or console players who often seek new or trending experiences as a potential audience (or set of audiences around the world), you can create a profile of who these players are, what motivates them, and how to communicate with them. Let's call these players "new game seekers."

This cohort mostly consists of Gen Z and Millennials (~76%) male consumers, with **nearly 80% playing on either two or three platforms on average per month.**

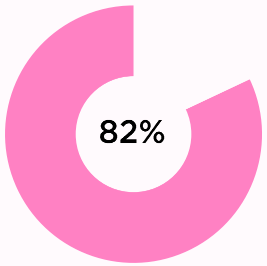
Their playtime on PC and console is almost 50% higher than the global average, indicating that they are a highly engaged global audience.

Over 80% of new game seekers pay for games (and spend most on console)

Payment profile of PC/console gamers who often seek out new or trending games

Base: Players who prefer playing on PC or console

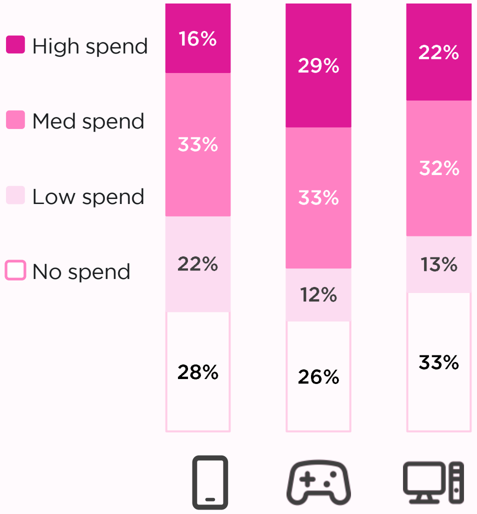
Payers (any platform, last 6 months)[1]



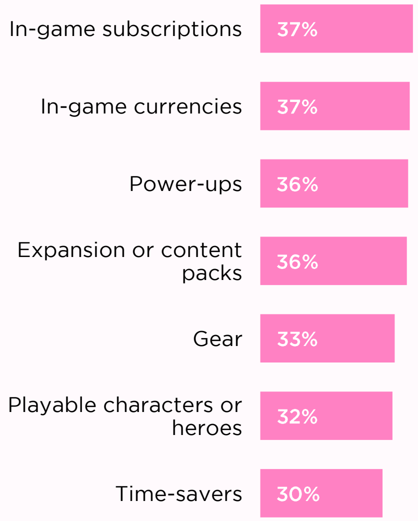
PC / console purchases (last 6 months)

Games (boxed or DL)	76%
In-game/ MTX	58%
Subscriptions	46%

Paying segment (per platform)[2]



In-game purchases (last 6 months)



[1] Players who spend money on average monthly, on games on a PC, console, or mobile device. Spending money includes gifts, downloadable content, subscriptions, and other micro-transactions

[2] Minor spend: up to £/€/$5 a month; Average spend: between £/€/$5 – £/€/$25 a month; Big spend: £/€/$25 or more a month

29% of new game seekers spend over $25 per month on console gaming

It's no surprise that PC or console players who often seek new or trending games and experiences are happy to spend money on them.

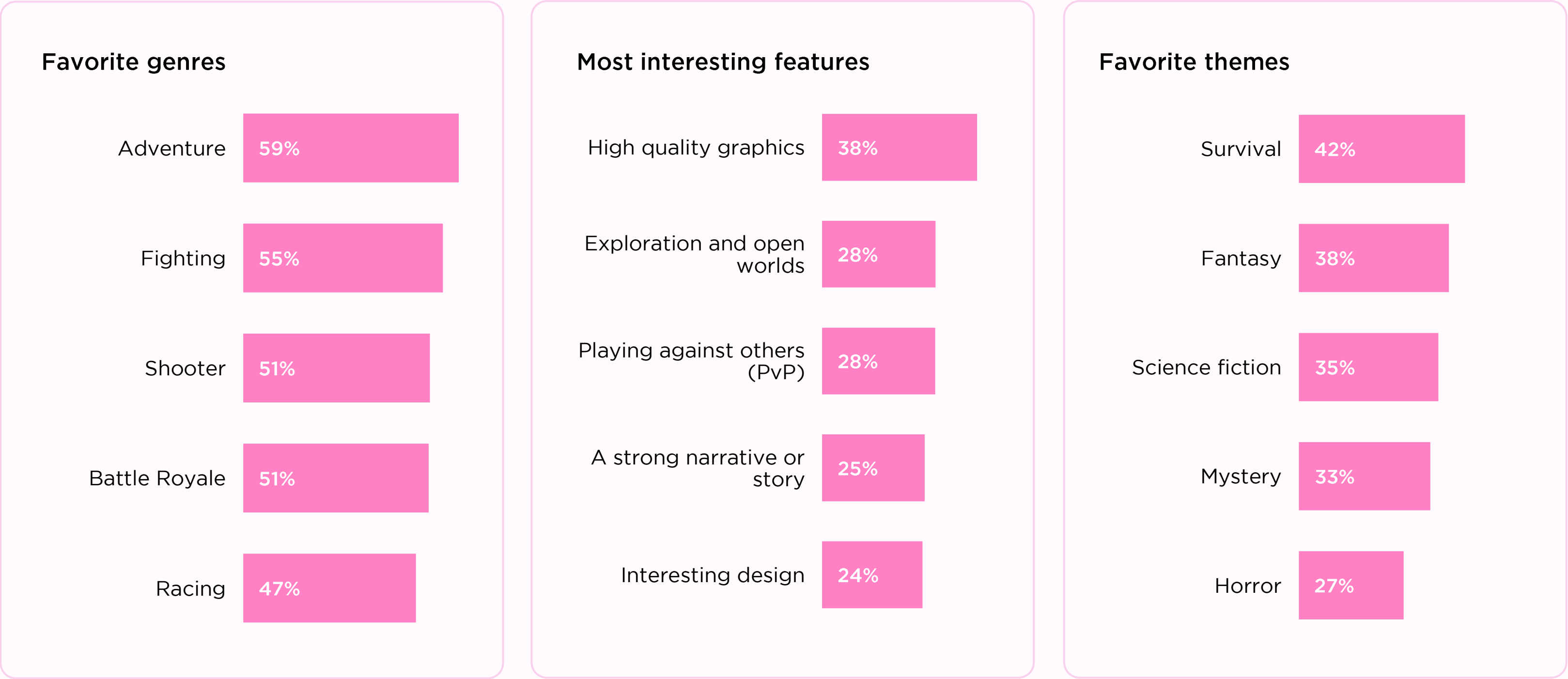
This cohort is more likely than not to spend money on games, with more than three-quarters of them purchasing a game in the last six months. **In-game subscriptions and currencies are particularly popular for this player group.**

Source: Newzoo Global Gamer Study 2024 (Global weighted average across 36 markets)
Q. Gamer identity statements (agree/ disagree scale). Base: Favorite is PC or console (n=27,111) who often seek out new and trending games (n=7,236).

New game seekers are most likely to prefer adventure games, graphical fidelity, and the theme of survival

Game preferences of PC/console gamers who often seek out new or trending games

Base: Players who prefer playing on PC or console



[1] Total aggregated score of five, seven-point scale affinity questions (individual max. score is therefore 35, the min. is 5). Players are divided into four equal-sized categories depending their score (from the lowest 25% to highest 25%)

What kinds of games draw in new game seekers?

It's fair to assume that these PC or console gamers already play at least one or several of the main franchises or spend time on platforms like *Minecraft* or *Fortnite*. So, which elements are most effective in the competition for engagement and revenue?

For this cohort, **games with high graphical fidelity and survival mechanics seem to be the most popular**, though these players also prefer competing against one another almost as much as they love a good Adventure.

Source: Newzoo Global Gamer Study 2024 (Global weighted average across 36 markets)
Q. Gamer identity statements (agree/ disagree scale). Base: Favorite is PC or console (n=27,111) who often seek out new and trending games (n=7,236).

Even the people who seek new games are players of the biggest franchises in gaming

Top franchises played by in the last 6 months by PC/console gamers who often seek out new or trending games

Base: Players who prefer playing on PC or console

#1
Call of Duty

#2
Grand Theft Auto

#3
Minecraft

#4
Fortnite

#5
EA Sports FC / FIFA

#6
Resident Evil

#7
Marvel

#8
God of War

#9
Roblox

#10
Mortal Kombat

New game seekers tend to share many of the same franchise preferences as most PC or console players*. The top five franchises here are the same for them and for players in general.

What's also important to understand is that players within this 31% of new game seekers, as harder-core gamers, simply play more games. **They are far more likely to play a *Call of Duty* or *FIFA Sports FC* game than the average player**, even if they share the same genre preferences.

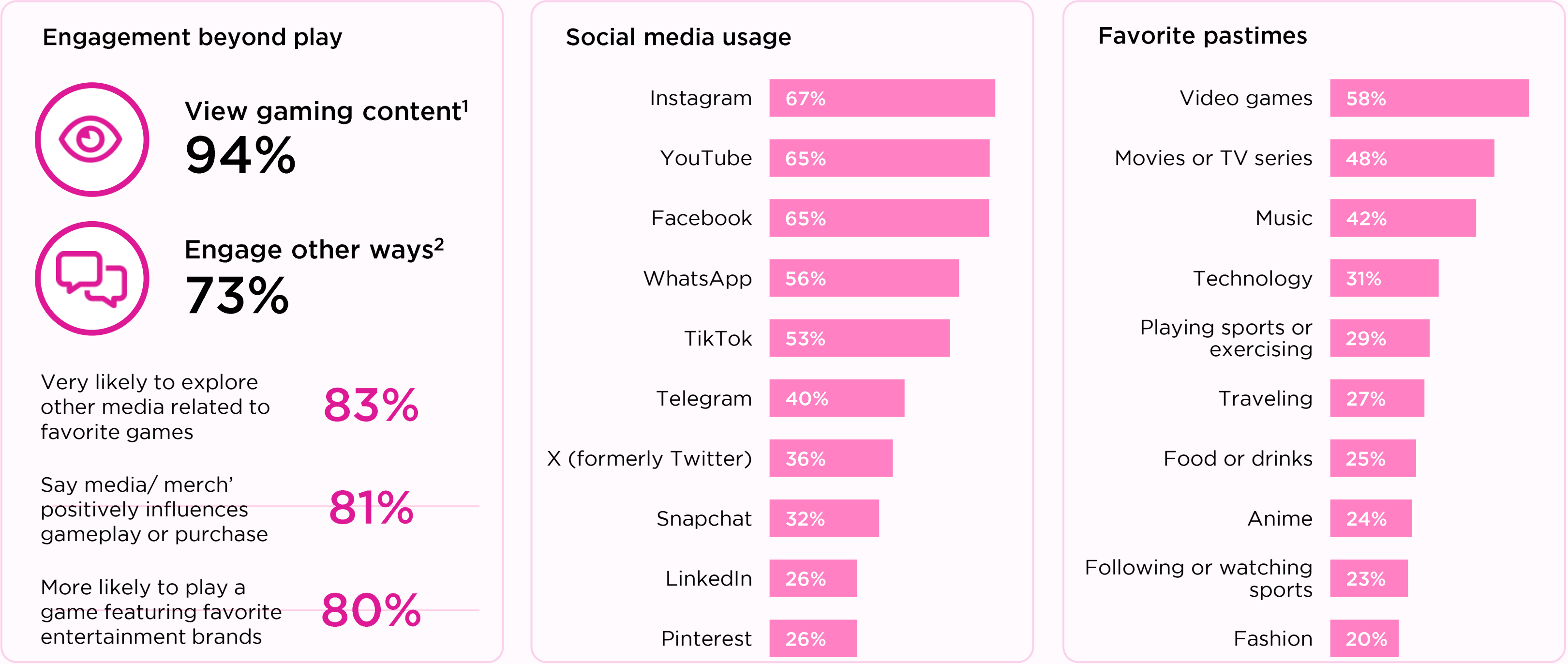
Notably, several of these franchises released new entries in the data collection period for this report, including *Resident Evil 4* (the remake) and *Marvel's Spider-Man 2*. These games called upon IP legacy and brand appeal to draw players away from live-service tentpoles, but **our trend-seeking cohort was more likely to play them than the average player**.

Source: Newzoo Global Gamer Study 2024 (Global weighted average across 36 markets)
Q. Gamer identity statements (agree/ disagree scale). Base: Favorite is PC or console (n=27,111) who often seek out new and trending games (n=7,236).

Over 80% of new game seekers are very likely to explore media related to their favorite games

Payment profile of PC/console gamers who often seek out new or trending games

Base: Players who prefer playing on PC or console



[1] Viewers are those who watched live-streamed or pre-recorded gaming video content in the past 12 months
[2] Other gaming engagement includes those who 'often' or 'sometimes" follow video gaming channels or esports broadcasters, socialized through gaming communities, discussed games with family and friends, listened to podcasts, or attended in-person gaming conventions

Frequent trend seekers tend to be quite likely to engage with video game content beyond playing the game.

Over 90% of this global cohort view gaming content, and 73% engage in other ways, including following gaming channels, socializing via online communities, or attending conventions.

These players are also more likely than average to seek out media related to their favorite games and play games featuring brands they like. Gaming is their favorite pastime, **impacting how they interact with media and entertainment more broadly**.

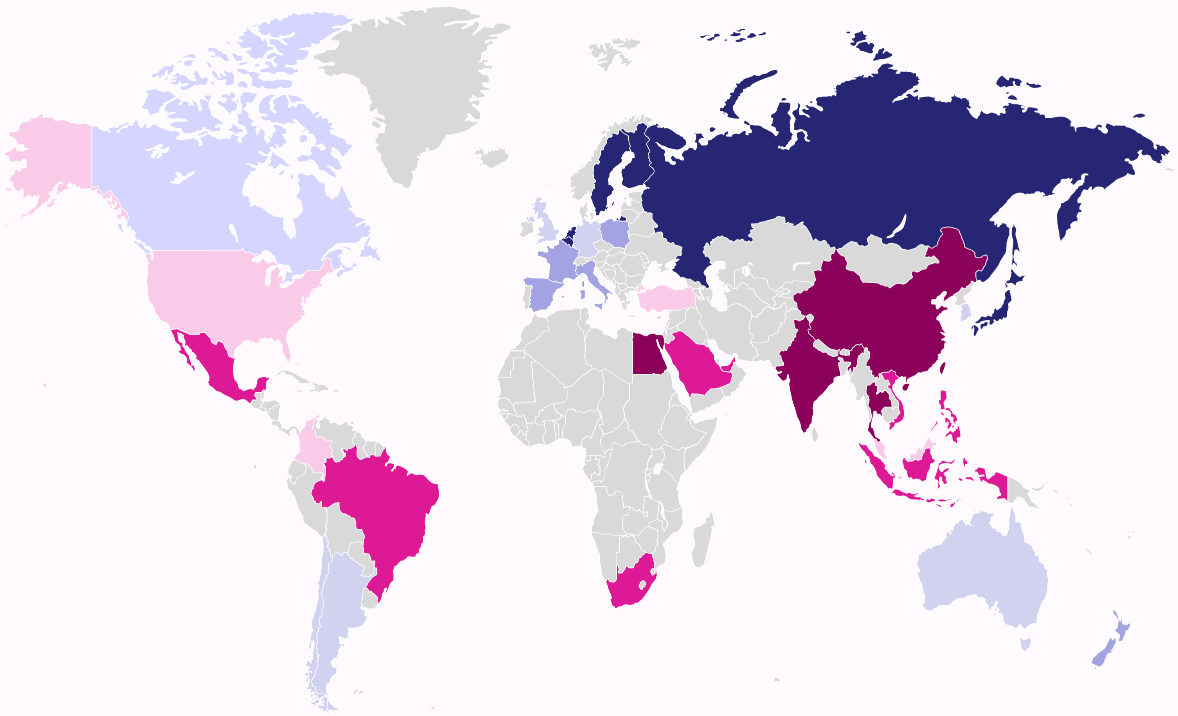
Engagement data gives insight into how to reach these active players, clarifying marketing plans and community-building initiatives.

Source: Newzoo Global Gamer Study 2024 (Global weighted average across 36 markets)
Q. Gamer identity statements (agree/ disagree scale). Base: Favorite is PC or console (n=27,111) who often seek out new and trending games (n=7,236).

Some markets have more new game seekers than others

Geographic distribution of PC/console gamers who often seek out new or trending games

Base: Players who prefer playing on PC or console



- >35%: China, India, Thailand, Egypt, Saudi Arabia, Vietnam
- 30-35% - United Arab Emirates, Philippines, Brazil, Singapore, Indonesia, Taiwan, Mexico, South Africa
- 25-29% - Malaysia, United States, Colombia, Turkey
- 20-24% - Chile, Australia, Canada, South Korea, Germany, United Kingdom, Argentina
- 15-19% - France, Spain, Italy, New Zealand, Poland
- <15% - Sweden, Belgium, Russia, Netherlands, Finland, Japan

On a global scale, nearly a third of players who prefer PC or console often seek out new and trending games.

Some markets have more active new game seekers than others. **Over 35% of PC or console players in China, India, and Saudi Arabia, for instance, say they try new, trending games often**, suggesting a bit more willingness to seek out novel experiences.

In contrast, markets like Sweden, The Netherlands, and Japan are less likely than the average global player to model this gamer behavior.

If you know that you're targeting new game seekers, the second crucial step is **knowing where they are**. This helps you refine your go-to-market priorities for new titles.

Source: Newzoo Global Gamer Study 2024 (Global weighted average across 36 markets)
Q. Gamer identity statements (agree/ disagree scale). Base: Favorite is PC or console (n=27,111) who often seek out new and trending games (n=7,236).

What's motivating players to play and spend, and how can you capitalize on these motivations?

Playtime may be declining, and fewer and fewer titles are taking an outsized chunk of user engagement*. Still, there are still many PC and console players out there hungry for new games and creative engagement opportunities.

Knowing these players are out there is not even close to half the battle. You have to define who these players are and figure out the best ways to connect with them. In short, you should understand their motivations.

That's why we developed ten new **Motivational Gamer Personas**. These personas dig into why certain players pick up and play their games, why others do not, and how to find and communicate with these audiences. If the **Global Gamer Study** is the universe of gamers, the personas are both a map and a compass for better, data-driven segmentation.

We'll introduce our new personas in an upcoming Handbook to **Motivational Gamer Personas**. Want to learn more about them now?

Contact us for a persona walkthrough and start building more refined audience segments.





*Want to know where these stats come from? Learn all about declining playtime hours and what that means for PC and console gaming in this year's report on the state of the market.

The data powering this report

- 73,000+ consumers surveyed
- 36 markets covered
- 200+ variables

The Global Gamer Study is the most comprehensive consumer research product covering gamers in the world:

- Full demographic and psychographic profiles
- Gaming, spending, and viewing behavior and attitudes
- Motivational player segmentation
- Media, lifestyle, and consumer brands consumption
- Hardware, PC, console, mobile, and cloud insights
- Three years of data accessible through our easy-to-use platform & tools

Find out more