COMPLEMENTARY PREVIEW

U.S. Gamer Segmentation

2024 Edition

August 2024

Table of Contents

3	**DATA SOURCES & METHODOLOGY**
4	**ANALYST NOTE**
5	**TOPLINE FINDINGS**
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
11	**U.S. GAMING AUDIENCE OVERVIEW**
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
20	**BEHAVIORAL SEGMENTATION & PROFILES**
21	Segment Demographics
22	Segment Gaming Investment
23 - 34	Gamer Segment Profiles
35	**APPENDICES**
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

Topline Findings

Circana.

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

of U.S. gamers

Console Warriors

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

of U.S. gamers

Transitionals

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

of U.S. gamers

Easy Accessors

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

of U.S. gamers

Daily Dabblers

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

of U.S. gamers

Incidental Players

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

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.**

Circana

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.

[illegible]

[illegible]

[illegible]

[illegible]

U.S. Video Gaming at a Glance

71%
of U.S. Consumers play video games
(from 2022)

236.4M
Total Gamers (Ages 2+)
(from in 2022)

Gamers spend an average of
15 HOURS
per week playing video games
(from in 2022)

They spent an average of
$56.20
on video game purchases in the past 6 months
(from in 2022)

32% play games on only one platform

27% only use mobile devices

66% use at least a mobile device and PC or console

28% use all three (mobile, PC and console) (flat)

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

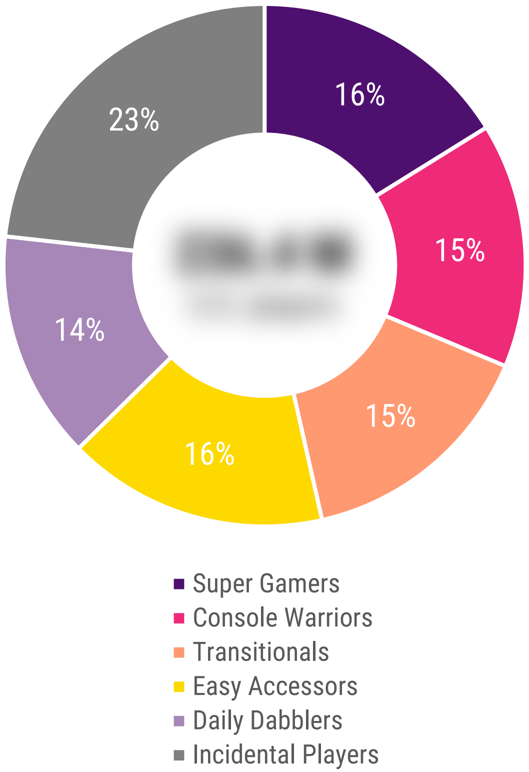
This includes users of designated gaming handhelds, as well as those who use virtual reality headsets, plug-and-play devices (e.g. Nintendo NES Classic Edition), and child-oriented devices (e.g. Leapfrog). Growth in this category is driven by VR. Ownership of these device types is generally low (<6%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

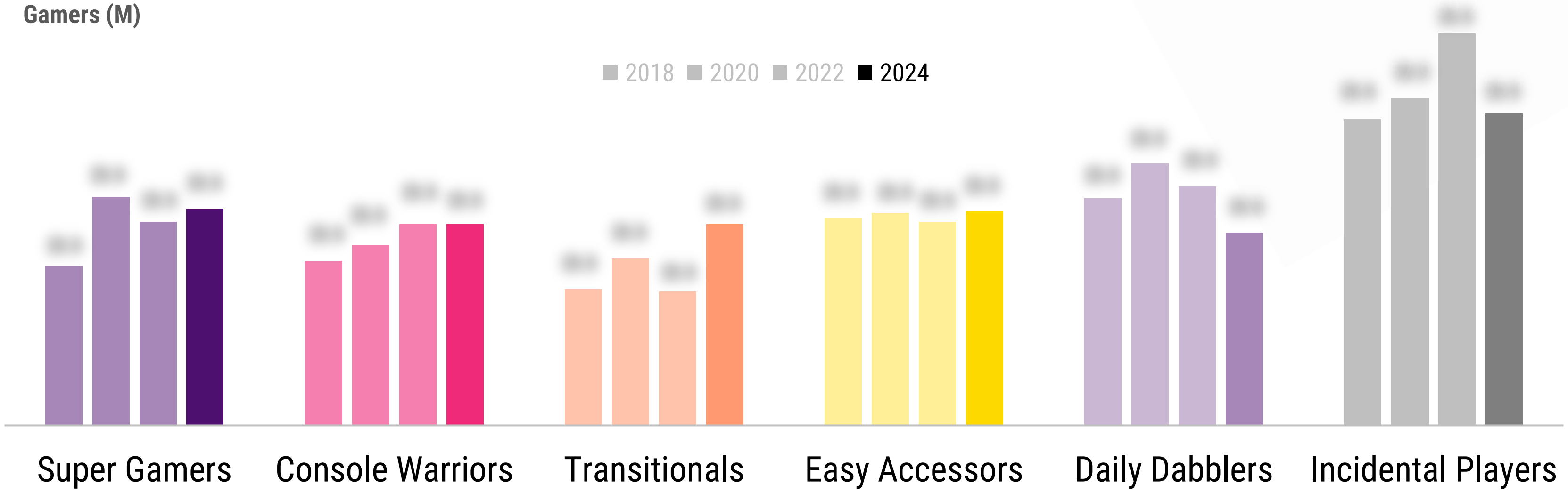
Trends in player segments

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

Segment share



Segment trends 2018 - 2024



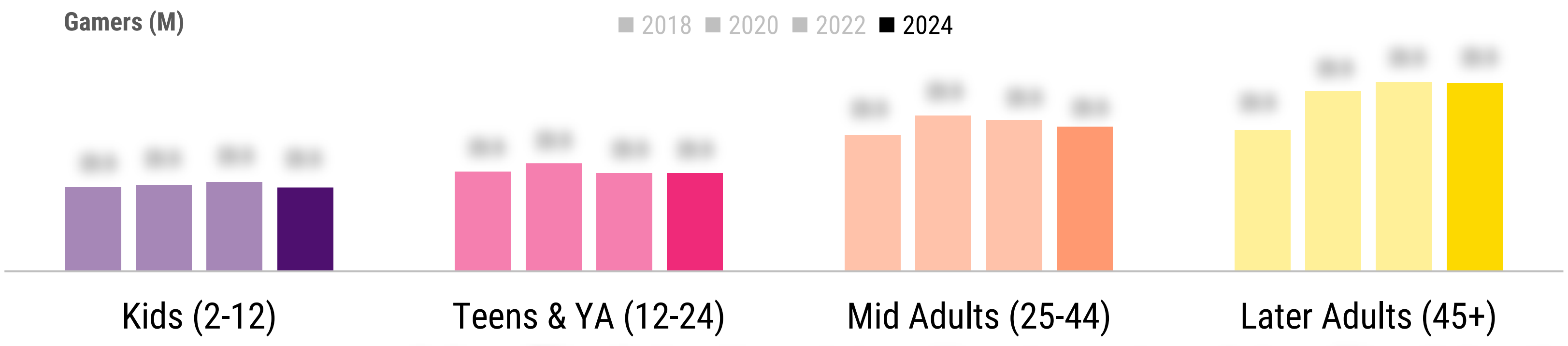
The biggest change to note is a significant decrease in *Incidental Players* and *Daily Dabblers*, which accounted for a combined [illegible]

Circana.

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.

Trends by Player Age

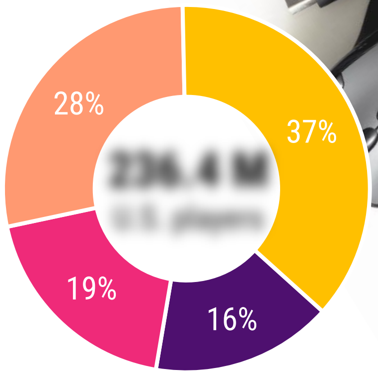


Kids (2-12) – Key Segments:
- Easy Accessors (Girls)
- Console Warriors (Boys)

Teens & YA (12-24) – Key Segments:
- Super Gamers (Male & Female)
- Console Warriors (Male)
- Easy Accessors (Female)

Mid Adults (25-44) – Key Segments:
- Super Gamers (Men)
- Transitionals (Men & Women)

Later Adults (45+) – Key Segments:
- Incidental Players (Men & Women)
- Daily Dabblers (Men & Women)
- Transitionals (Men & Women)



Age share

Circana.

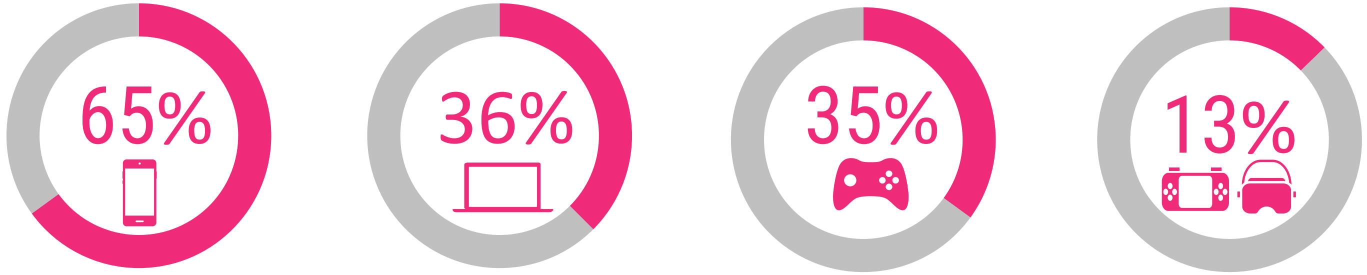
U.S. Gaming Audience Overview

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…



Play Mobile Games
(no change from 2022)

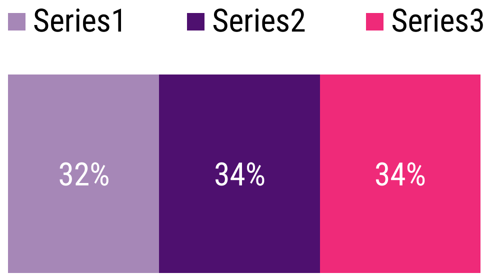
Play PC Games
(down 4% from 40% in 2022)

Play Console Games
(no change from 2022)

Play Other Games
(up 2% from 11% in 2022)

Total Gamers (Ages 2+)

Number of Device Types Used
U.S. Gamers, Ages 2+



Circana.

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).

Source: NPD

U.S. Video Game Play Time

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

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

30% are Moderate Players

28% are Heavy Players

92% play mobile games

Mobile gamers play an average of:

8.1 hours per week

▲ 1.1 hours from 2022

51% play PC games

PC gamers play an average of:

4.6 hours per week

Flat from 2022

50% play console games

Console gamers play an average of:

10.2 hours per week

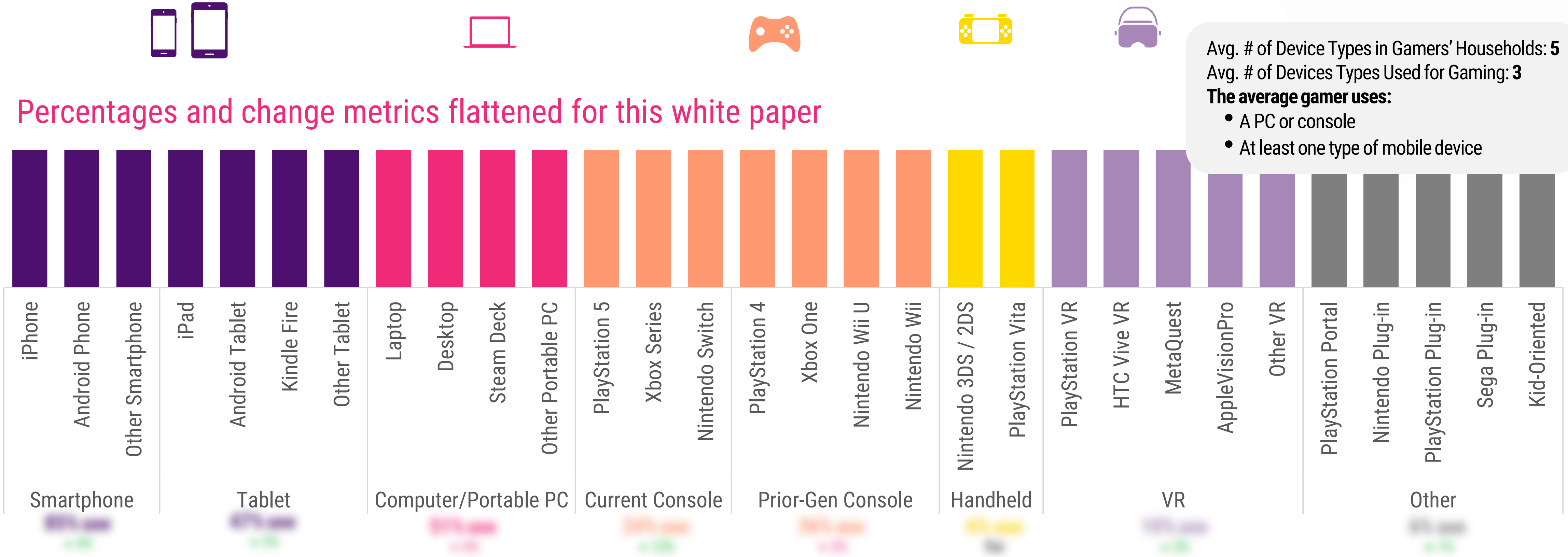
▲ 1.9 hours from 2022

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



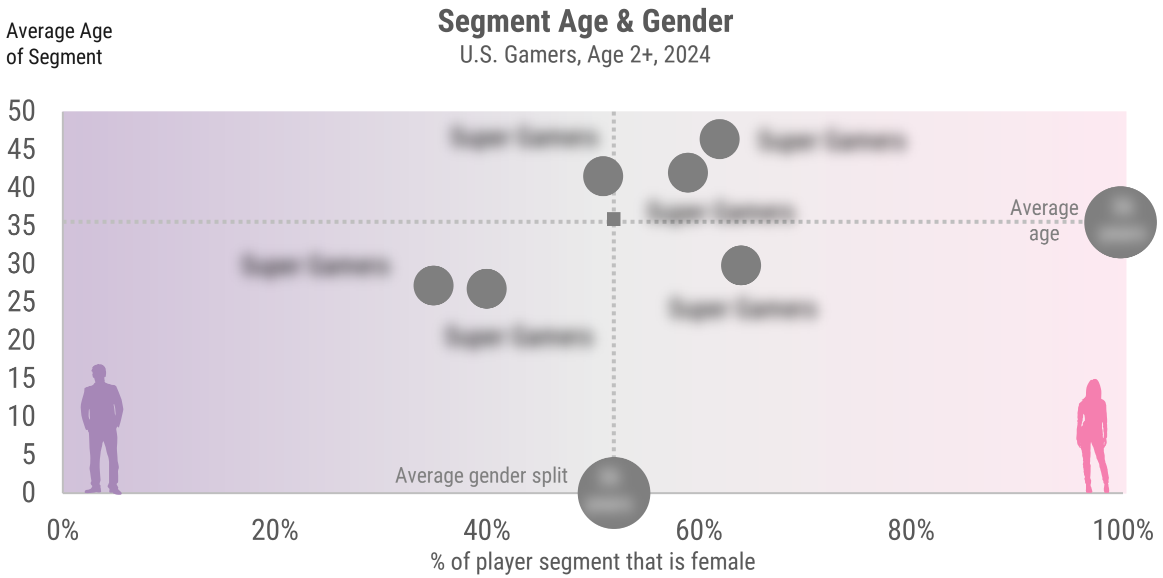
Avg. # of Device Types in Gamers' Households: **5**
Avg. # of Devices Types Used for Gaming: **3**
The average gamer uses:
- A PC or console
- At least one type of mobile device

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, and black represents no change.

Behavioral Segmentation & Profiles

Segment Demographics

Averages similar to 2022 with small shifts in segments



Key observations

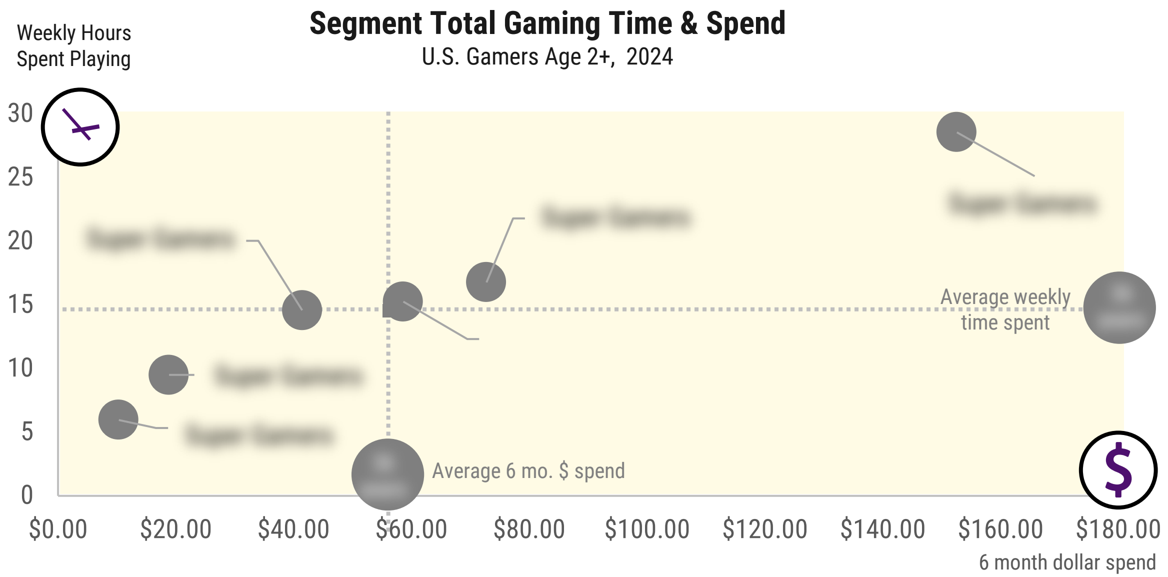
	Super Gamers	Console Warriors	Transitionals	Easy Accessors	Daily Dabblers	Incidental Players
% of Gamers	16%	15%	15%	16%	14%	23%
U.S. Market Size (M)	38.3	35.6	36.6	37.8	34.1	55.1
Final report includes % changes for significant shifts			**Demographics**			
Avg. Age	XX	XX	XX	XX	XX	XX
% Female	XX	XX	XX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

Circana.

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..

Segment Gaming Investment

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



Key observations

	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

Circana.

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.

of U.S. gamers

up from 36M in 2022

Super Gamers

The industry's most valuable consumers

Report includes detailer profiles for every gamer segment

Gaming Device Summary

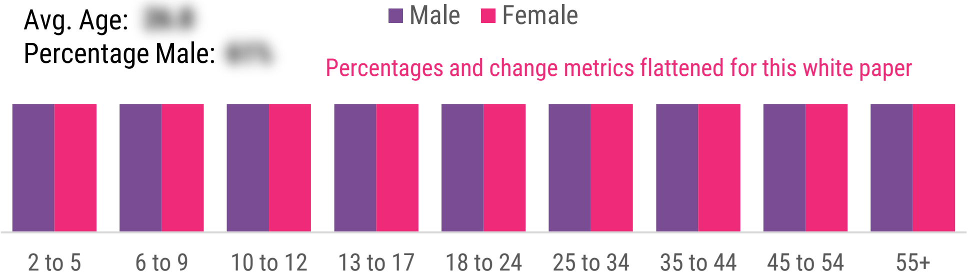
97% use multiple device types – 81% use 3 or more
Play and spend heavily across devices used

Demographics

Age & Gender Distribution

Avg. Age:
Percentage Male:

Percentages and change metrics flattened for this white paper



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

Circana.

Source: The Circana Gamer Segmentation Report, 2024.

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?

For more information contact your Circana representative or email mario.gomes@circana.com

Circana.