

# MILLENNIALS ON MILLENNIALS: GAMING MEDIA CONSUMPTION

# WELCOME

Games are no longer child's play. Millennials, the first generation to grow up with widespread access to video games, are now adults between the ages of 22 and 38. The oldest Millennials were four years old when the Nintendo Entertainment System launched in North America in 1985. Those who spent their childhood playing games didn't suddenly abandon the hobby when they reached adulthood.

With myriad platforms, devices and technologies available today, games are more accessible than ever. The arrival of smartphones brought gaming to consumers who didn't own a video game system growing up. Coupled with a paradigm shift where most mobile games are free to play, big hits like *Pokémon GO* can easily attract monthly player counts in the tens of millions.

Among Millennial gamers, seven in 10<sup>1</sup> (71%) watch gaming video content (GVC), or online videos about games, on platforms like YouTube and Twitch. In addition to watching GVC for nearly six hours each week, this highly engaged audience also spends an average of \$29<sup>2</sup> in donations each month to their favorite content creators.

Games have become part and parcel of the Millennial media diet, with two in three U.S. Millennials now playing every month. Brands and media companies should add gaming to their media plans so they reach a highly engaged Millennial audience.



# 71%

OF MILLENNIAL GAMERS WATCH GAMING VIDEO CONTENT (GVC), OR ONLINE VIDEOS ABOUT GAMES, ON PLATFORMS LIKE YOUTUBE AND TWITCH.

<sup>1</sup>SuperData Research, Cloud Gaming Survey of 1000 US respondents of at least 13 years of age that have played a video game in the past month. February 2019

<sup>2</sup>Among those who do spend.

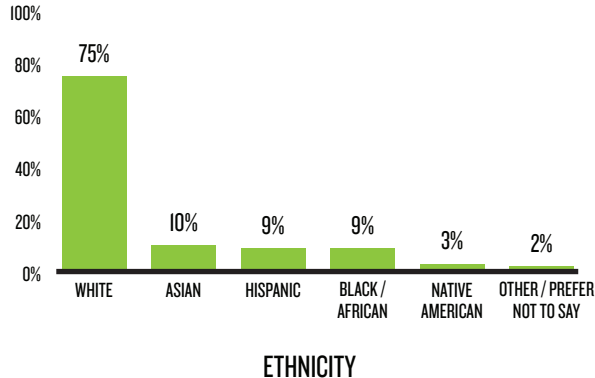
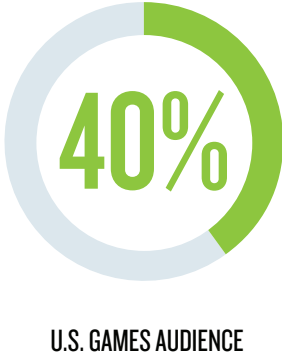
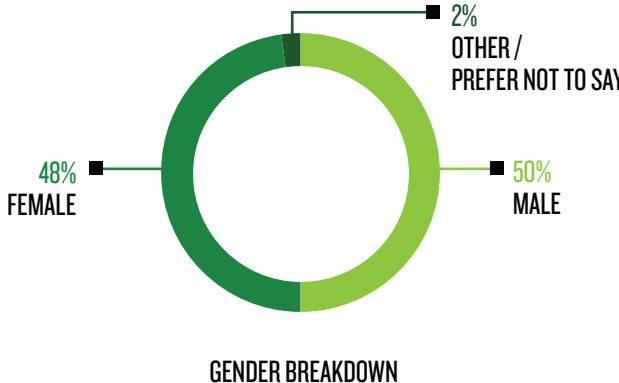
# MILLENNIAL GAMERS ARE A WIDE-RANGING DEMOGRAPHIC GROUP

As an audience, Millennial gamers are far from monolithic. Some Millennials play games to immerse themselves in interactive, movie-like experiences, while others do so for the thrill of competition. And then there are those who simply play to relax and pass the time.

Millennial gamers have moved well into adulthood, and the majority (54%) have full-time jobs. Many are tech early adopters, as nearly half (45%) agree that they're often the first to try new technologies, compared with 37% of Gen Zers and 28% of those in Gen X and up.

Millennial gamers have a roughly even female/male gender split, largely due to the emergence of portable devices. In fact, smartphones brought many women into the audience, and today, 54% of Millennial mobile gamers are women. However, a significant share of women still play on other devices as they make up 43% of the Millennial PC game audience and 41% of the Millennial console player base.

## KEY FACTS:



**54%** WITH FULL-TIME EMPLOYMENT

**46%** WITH CHILDREN<sup>4</sup>

**43%** WITH A BACHELOR'S DEGREE OR HIGHER

**76%** PAY FOR A MOVIE/TV STREAMING SERVICE

**\$58,000** AVERAGE HOUSEHOLD INCOME

**38%** PAY FOR A MUSIC STREAMING SERVICE

<sup>3</sup>Among those 13 and up.  
<sup>4</sup>Share who are the parent or guardian of an individual 17 or younger.

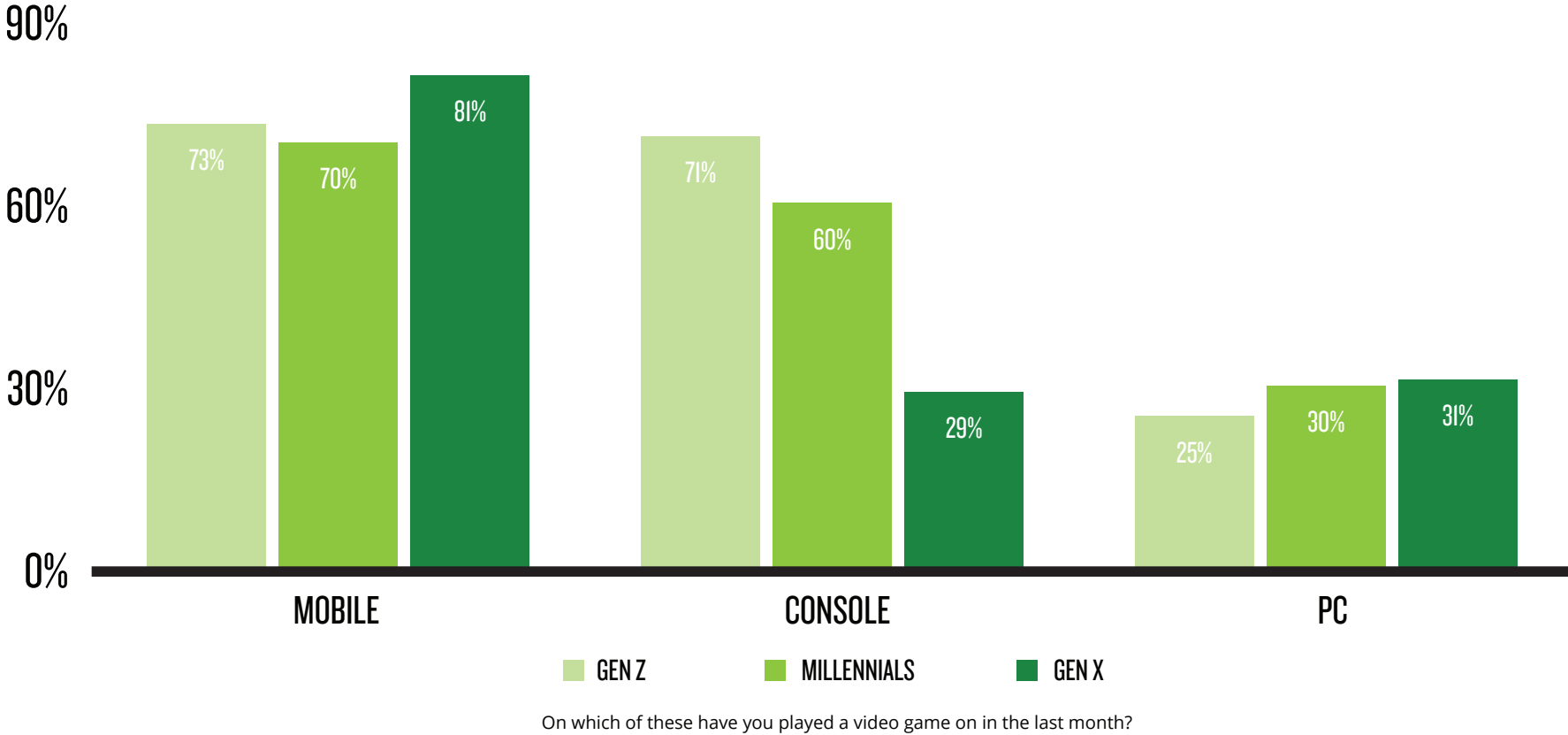
# MILLENNIALS LOVE MOBILE GAMES

While gaming is deeply associated with PCs and consoles, smartphones have overtaken them in the past decade to become the most popular gaming device among gamers. The convenience of smartphones as a gaming device is especially appealing to Millennials, as seven in 10 play mobile games on these devices at least once a month.

That's not to say the appeal of consoles and PCs among Millennials has fallen by the wayside. A significant share of Millennials (60%) still play on consoles like PlayStation 4 and Nintendo Switch. Although not as big as the console or mobile gaming audience, Millennial PC gamers make up 30% of the audience.

Games are capturing a substantial share of their leisure time. Millennials who play on smartphones and tablets spend an average of 9.7 hours a week playing. This playtime is broken up into multiple sessions on the go, but Millennials also invest ample time playing on PCs (seven hours weekly) and consoles (9.6 hours weekly), which tend to be conducive to longer sittings.

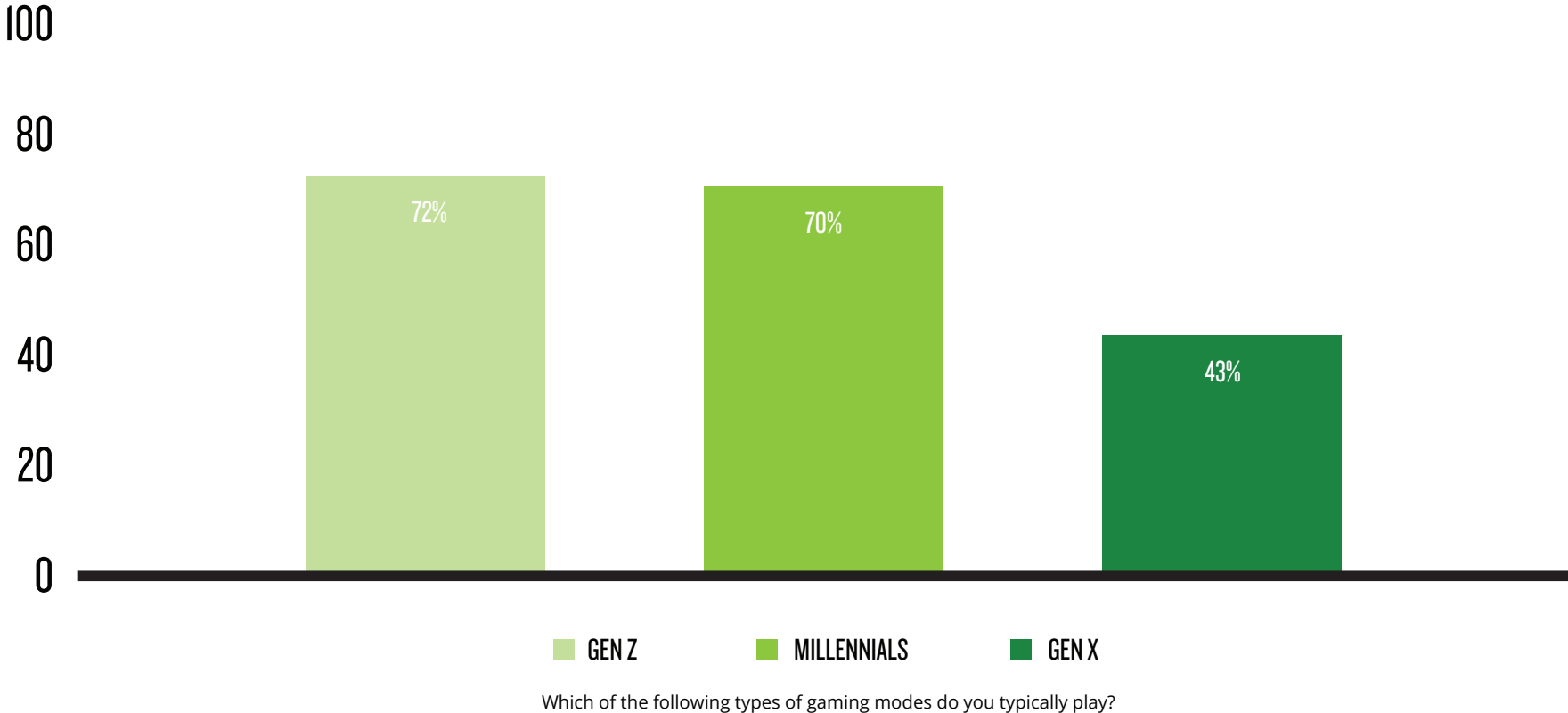
## GAMING DEVICE USE



# GAMES HAVE BECOME A SOCIAL ACTIVITY FOR MILLENNIALS

Thanks to social features that let connected gamers chat and play with each other, a large share of Millennials and Gen Zers play multiplayer games to virtually hang out with their friends and families. Members of Gen X and up are, in contrast, far less likely to play multiplayer titles (43%).

## SHARE OF PLAYERS WHO PLAY MULTIPLAYER GAMES



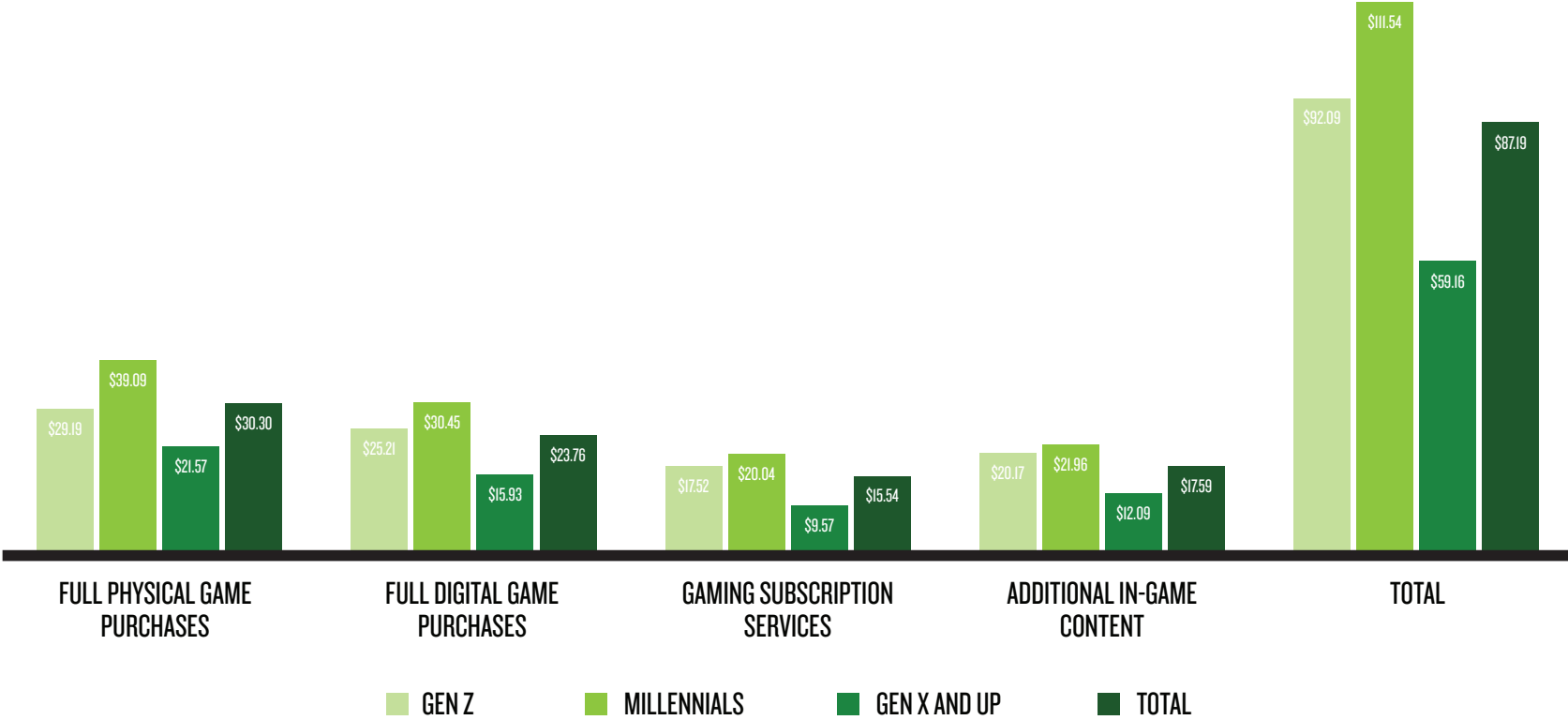
**A LARGE SHARE OF MILLENNIALS AND GEN ZERS PLAY MULTIPLAYER GAMES TO VIRTUALLY HANG OUT WITH THEIR FRIENDS AND FAMILIES**

# MILLENNIALS SPEND THE MOST MONEY ON GAMES OF ANY AGE GROUP

On average, Millennials spend \$112 on games every month, \$20 more than Gen Zers, and nearly twice as much as Gen Xers, who only spend \$59 a month.

Much like the music and movie industries, the video game industry has largely moved online, with in-store purchases of physical games giving way to digital offerings. Overall, Millennial gamers spend \$72 a month on game downloads and gaming subscriptions, compared with \$39 a month on physical copies. They also spend \$22 each month on in-game content, which includes virtual items like costumes for *Fortnite* characters.

## SPENDING ON GAME CONTENT



In a typical month, about how much do you spend on each of the following?



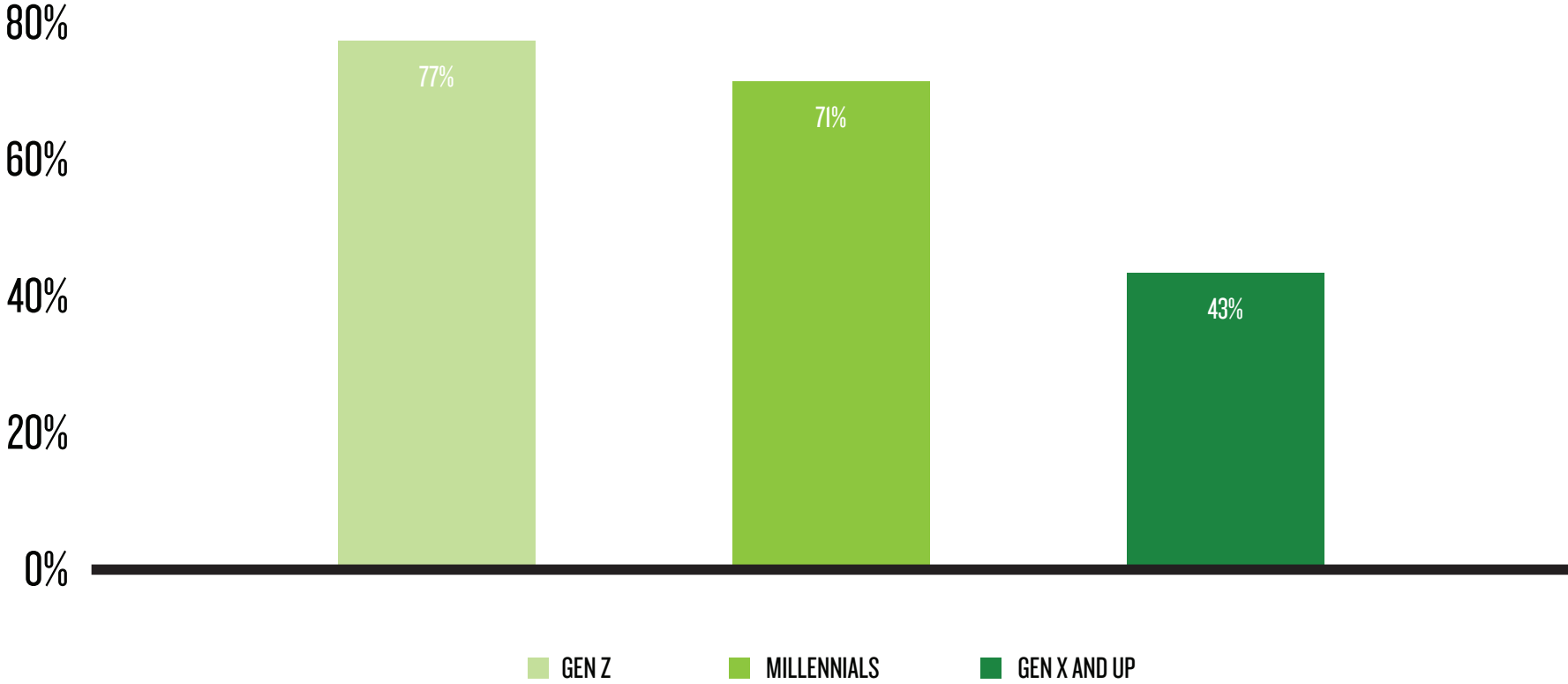
**MILLENNIAL GAMERS  
SPEND \$72 A MONTH  
ON GAME DOWNLOADS AND  
GAMING SUBSCRIPTION**

# GVC KEEPS MILLENNIALS TUNED INTO GAME CULTURE

Supplementing their passion for gaming, Millennials spend ample time watching GVC. Nearly three in four (71%) Millennials who play games also watch some form of GVC.

Gen Zers watch at a similar rate as Millennials, with 77% of Gen Z video game players tuning in to GVC. Gen X and up, on the other hand, are much less likely to watch GVC (43%).

## SHARE OF GAMERS WHO WATCH GVC



Which of the following types of video game-related content, if any, have you watched in the past 12 months?



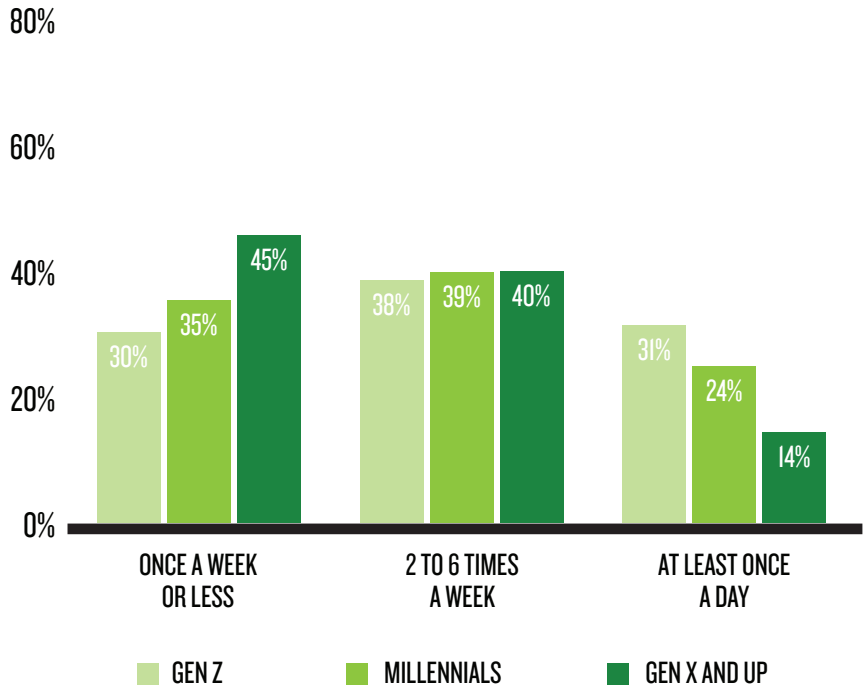
**NEARLY THREE IN FOUR (71%) MILLENNIALS WHO PLAY GAMES ALSO WATCH SOME FORM OF GVC.**

# MILLENNIALS SPEND AN AVERAGE OF ALMOST 6 HOURS A WEEK WATCHING GVC

Millennials and Gen Zers watch more GVC than Gen Xers and up. Millennial GVC viewers watch for 97 minutes per viewing session compared with 106 minutes for their Gen Z counterparts. Gen X and up watch for less time than Millennials and Gen Z, spending only 73 minutes per GVC viewing session. Overall viewing times have similar variance, with Gen Xers and older audiences watching roughly three hours per week, the least of any age group.

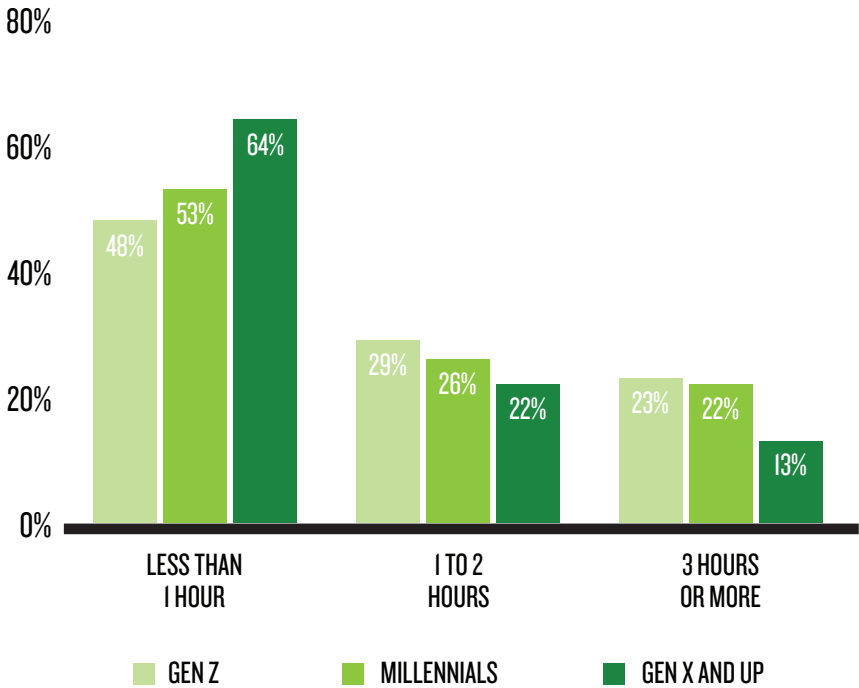
Most viewers watch GVC since it is both entertaining and educational. Many Twitch viewers watch their favorite channel because they can learn gameplay strategies from top players (38%), and nearly as many watch simply because they enjoy the personalities of the creators (36%).

## FREQUENCY

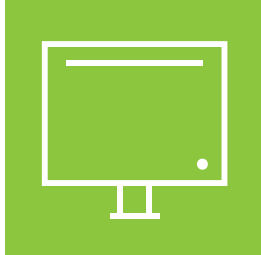


In the past MONTH, how often did you watch gaming video content?

## SESSION LENGTH



On average, how long is your typical gaming video content viewing session?



**MILLENNIAL GVC VIEWERS WATCH FOR 97 MINUTES PER VIEWING SESSION**



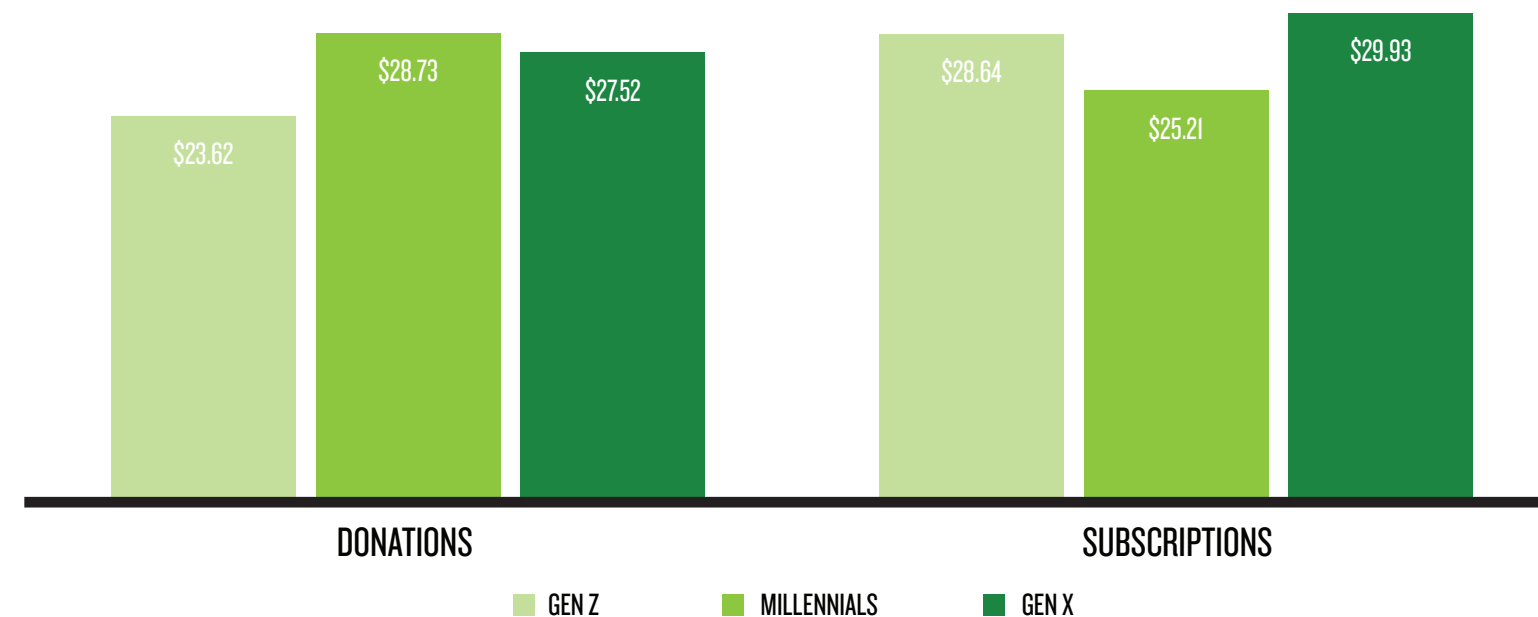
# MILLENNIALS FINANCIALLY SUPPORT THEIR FAVORITE GVC CREATORS

Popular GVC creators typically stick to a regular schedule when broadcasting or uploading videos. In order to maintain a steady level of viewers, creators must be attentive to their audience and provide new content frequently. As a result, creating GVC is a full-time job for the biggest creators.

GVC viewers directly support creators in two primary ways: subscriptions and donations. They pay subscription fees to creators once per month through the platform that creators stream on or upload to, while donations are typically one-time payments of any value that go directly to creators. These two types of payments will make up nearly one-third (30%) of GVC revenue in 2019. Viewers get rewards like on-air shoutouts and exclusive chat emotes in exchange for donating or subscribing. However, the satisfaction of supporting a creator is often a reward in itself for committed fans.

Millennials spend more on donations to their favorite creators (\$29) than they do subscriptions (\$25). They outspend others in donations, but they do spend less on subscriptions (\$25 versus \$30 for Gen Z and \$29 for Gen X and up).

## SPENDING ON GVC



In the past month, approximately how much did you spend on channel subscriptions and/or donations?<sup>5</sup>

<sup>5</sup>Averages do not include those who spend nothing.

## CONCLUSION

Gaming isn't an activity Millennials are about to grow out of anytime soon. They are set to be the first generation of lifelong gamers, and media firms and marketers need to take note. By adding games to their media mix, advertisers can reach Millennials where they spend a significant part of their leisure time and money.



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## ABOUT NIELSEN

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