MARKET RESEARCH

THE STATE OF ONLINE GAMING – 2020

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EXECUTIVE SUMMARY AND OVERVIEW

The *State of Online Gaming 2020* research report highlights the latest findings in an ongoing series of consumer surveys about online habits and opinions. This report is based on responses from 4,500 consumers in France, Germany, India, Italy, Japan, Singapore, South Korea, the U.K., and the U.S., age 18 and older who play video games at least once a week.

Respondents were asked questions on a variety of topics to determine the types of games they play and how often, the devices they use, how they access content, and what they believe is important for a successful gaming experience.

In the past year since the *State of Online Gaming 2019* report, there are new gaming options and shifts in online gaming behavior. A new category of online gaming is included in this year's survey – Console-less Gaming Services (such as Google Stadia). In terms of the most notable behavior shift, binge-gaming is on the rise, with most gamers reporting having played for more than four hours consecutively.

Highlights of this report include:

- New console-less gaming services are gaining traction. Globally, 44 percent of gamers reported they would subscribe to a service, with gamers ages 18-45, aspiring professionals and expert gamers the most interested. Too high pricing and poor performance are the top obstacles to subscribing.

- Binge-gaming is on the rise. Gamers 18-60 have played for more than four hours consecutively. Globally, gamers reported their average longest consecutive playing session lasting four hours and 36 minutes, a seven percent increase over 2019. Younger gamers ages 18-25 have longer consecutive playing times, with the longest average duration of six hours and 34 minutes, up 11 percent over 2019.

- Mobile phones remain the primary gaming device followed by computers, gaming consoles and tablets. The gap widened this year with the preference for mobile phones increasing 13 percent.

- Download speed matters. Globally, 87 percent of gamers find the process of downloading games frustrating, a small increase of two percent since last year which may represent an improvement in performance. The length of time it takes to download games was noted as the top issue, with 32 percent of gamers citing this as their primary concern. Expert gamers and aspiring professionals have the most frustration with download speed, with half of them noting this.

- Globally, Casual Single-Player games such as Candy Crush, Angry Birds, and Spider Solitaire, are the most popular, and First-Person shooter games including Call of Duty, Destiny 2 and Overwatch, are the second most popular type of video game played, and they increased in popularity by more than six percent in the past year.

- Watching gamers play video games online is more popular than watching sports for 18-25 year olds.

- Fast performance is critical to gamers, being cited as the most important aspect of game play across all age groups.

- Gaming can interfere with daily activities. Gamers from novices to aspiring professionals report they've missed daily activities due to playing video games for long periods of time. Across all the countries surveyed, missed sleep is the most pervasive.

- More than 38 percent of gamers would like to become professionals if they could support themselves as professional video gamers, an increase of three percent in the past year.

- Online video gaming continues to be popular. On average, video gamers spend six hours, 20 minutes each week playing games. However, this is a decrease in playing time of 11 percent in the past year.

- It's a toss-up between the preference for playing video games versus watching TV shows or movies in most countries but there is a clear preference by age groups. Gamers ages 18 to 45 year olds prefer to play video games while those 46 and older prefer watching movies and TV shows.

KEY FINDINGS

GAMERS SPEND MORE THAN SIX HOURS EACH WEEK PLAYING

Video gamers spend an average of six hours, 20 minutes each week playing games. This is a decrease of 11 percent in the last year. Nearly one-third (32 percent) play more than seven hours each week, with 17 percent playing more than 12 hours a week.

Gamers in Germany spend the most time playing, at an average of almost seven hours a week. South Korea had the lowest weekly average at 5.04 hours. Japan and the U.K. had the most gamers who play more than 20 hours each week at 12 percent and 10 percent respectively.

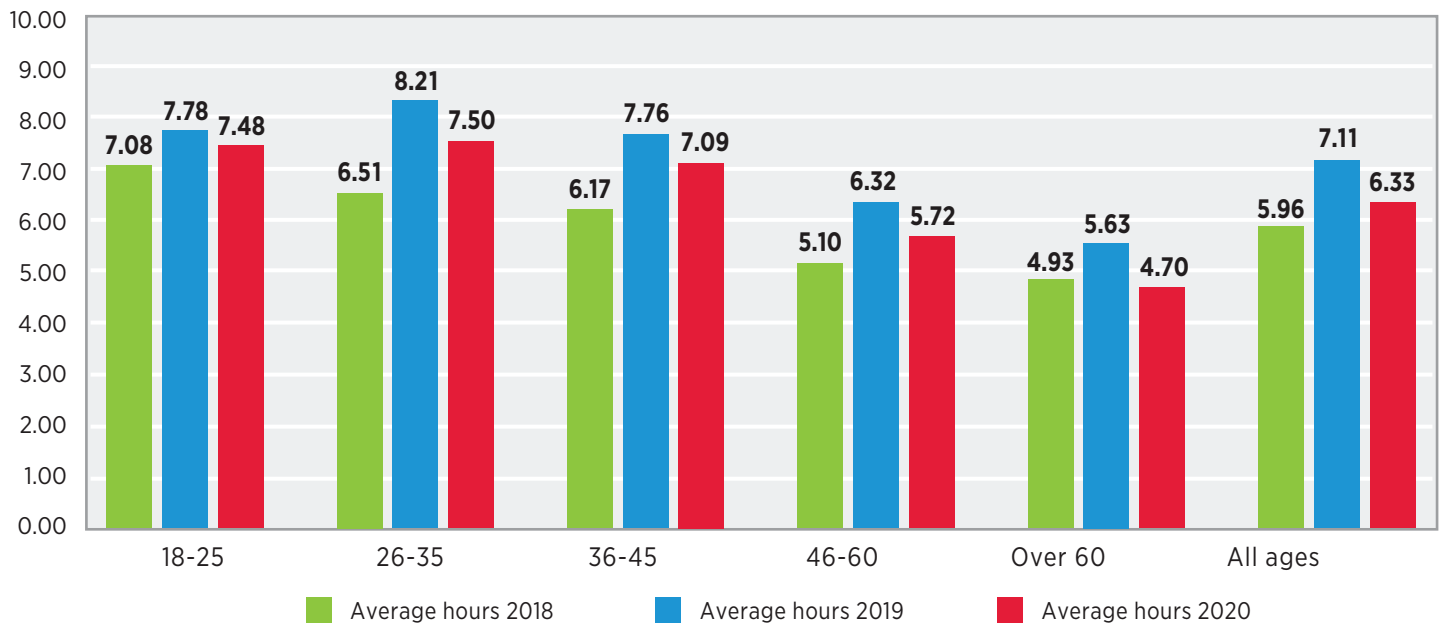| Country	Less than 1 hour a week	1-2 hours a week	2-4 hours a week	4-7 hours a week	7-12 hours a week	12-20 hours a week	More than 20 hours a week	Average Hours Each Week
France	14.7%	13.9%	19.7%	20.9%	14.7%	10.5%	5.6%	**6.22**
Germany	10.8%	16.8%	15.0%	21.0%	16.4%	13.0%	6.8%	**6.92**
India	12.4%	17.2%	21.2%	16.6%	15.0%	11.6%	6.0%	**6.35**
Italy	10.0%	18.4%	20.2%	19.8%	16.2%	9.4%	6.0%	**6.26**
Japan	22.0%	12.6%	15.6%	17.4%	11.6%	8.6%	12.2%	**6.64**
South Korea	19.8%	20.2%	19.4%	18.6%	10.4%	6.8%	4.8%	**5.04**
Singapore	15.5%	16.6%	19.8%	19.0%	16.0%	6.1%	7.0%	**5.85**
United Kingdom	11.4%	17.0%	19.6%	16.0%	16.2%	9.8%	10.0%	**6.89**
United States	13.6%	15.2%	17.4%	18.2%	16.4%	11.4%	7.8%	**6.76**
Global	**14.5%**	**16.4%**	**18.7%**	**18.6%**	**14.8%**	**9.7%**	**7.4%**	**6.33**

Figure 1: How many hours each week do you spend playing video games?

Gamers age 26-35 spend the most time playing, at 7.5 hours a week. Those over 60 spend the least, at 4.7 hours playing.

Ages	Less than 1 hour a week	1-2 hours a week	2-4 hours a week	4-7 hours a week	7-12 hours a week	12-20 hours a week	More than 20 hours a week	Average Hours Each Week
18-25 years old	9.1%	14.5%	16.9%	21.0%	16.1%	11.5%	11.0%	**7.48**
26-35 years old	8.0%	13.4%	19.2%	20.2%	17.0%	11.6%	10.5%	**7.50**
36-45 years old	9.3%	14.7%	21.1%	18.9%	15.0%	12.3%	8.8%	**7.09**
46-60 years old	15.9%	17.6%	18.9%	19.6%	14.7%	8.6%	4.9%	**5.72**
Over 60 years old	26.5%	20.3%	16.9%	14.0%	11.7%	6.1%	4.5%	**4.70**
All ages	**14.5%**	**16.4%**	**18.7%**	**18.6%**	**14.8%**	**9.7%**	**7.4%**	**6.33**

Figure 2: How many hours each week do you spend playing video games?

The age group with the highest decrease in gaming time during the last year is gamers over 60, who have decreased their weekly playing time by more than 16 percent. Gamers 18-25 decreased their playing time slightly by just under four percent.

Figure 3: How many hours each week do you spend playing video games? (2018, 2019 and 2020)

Men play nearly seven hours per week. This is an average of one hour and two minutes longer than women, who play 5.80 hours. 19.6 percent of men play for 12 hours or more, compared to just 14.4 percent of women.

Gender	Less than 1 hour a week	1-2 hours a week	2-4 hours a week	4-7 hours a week	7-12 hours a week	12-20 hours a week	More than 20 hours a week	Average Hours Each Week
Female	15.6%	17.5%	21.0%	18.2%	13.2%	7.9%	6.5%	**5.80**
Male	13.4%	15.4%	16.4%	19.0%	16.3%	11.4%	8.2%	**6.84**
All	**14.5%**	**16.4%**	**18.7%**	**18.6%**	**14.8%**	**9.7%**	**7.4%**	**7.11**

Figure 4: How many hours each week do you spend playing video games?

Not surprisingly, gamers identifying as aspiring professionals or experts play the most per week, while most casual gamers and novices play less than seven hours per week.

Gamer type	Less than 1 hour a week	1-2 hours a week	2-4 hours a week	4-7 hours a week	7-12 hours a week	12-20 hours a week	More than 20 hours a week
Aspiring professional	4.4%	4.4%	8.0%	17.5%	15.3%	21.9%	28.5%
Expert	2.2%	6.5%	13.1%	17.5%	22.2%	22.1%	16.6%
Casual gamer	11.1%	17.6%	22.2%	20.7%	15.4%	8.0%	5.1%
Novice	34.5%	22.5%	15.0%	14.1%	7.3%	3.2%	3.4%

Figure 5: How many hours each week do you spend playing video games?

MOBILE PHONES REMAIN THE PRIMARY GAMING DEVICE

Mobile phones remain the most popular device used to play video games globally. Gaming consoles have the highest usage in the U.K., tablets are used in India more than any other country and Italy has the highest computer usage.

| Country	Computer	Tablet	Gaming console	Mobile phone
France	1.72	1.11	1.60	2.12
Germany	1.73	0.95	1.39	1.83
India	1.87	1.24	1.40	2.63
Italy	1.99	1.06	1.64	2.21
Japan	1.10	0.94	0.97	2.82
South Korea	1.77	0.97	0.91	2.48
Singapore	1.57	1.09	1.03	2.41
United Kingdom	1.51	1.17	1.66	1.82
United States	1.55	1.15	1.52	2.11
Global	**1.65**	**1.08**	**1.35**	**2.27**

Figure 6: How much of your total time playing video games is on the following devices? (Scale 0-4 where 0 indicates the device is never used and 4 signifies the device is used most of the time)

Mobile phones are the most popular device across every age group followed by computers. Gaming consoles are most popular with gamers 26-35.

Age	Computer	Gaming console	Tablet	Mobile phone
18-25 years old	1.69	1.68	0.91	2.40
26-35 years old	1.74	1.97	1.32	2.45
36-45 years old	1.56	1.70	1.25	2.52
46-60 years old	1.56	1.16	1.01	2.30
Over 60 years old	1.74	0.52	0.92	1.76
All ages	**1.65**	**1.35**	**1.08**	**2.27**

Figure 7: How much of your total time playing video games is on the following devices? (Scale 0-4)

Women are more likely to use mobile phones for gaming than men, while men use computers and gaming consoles more than women.
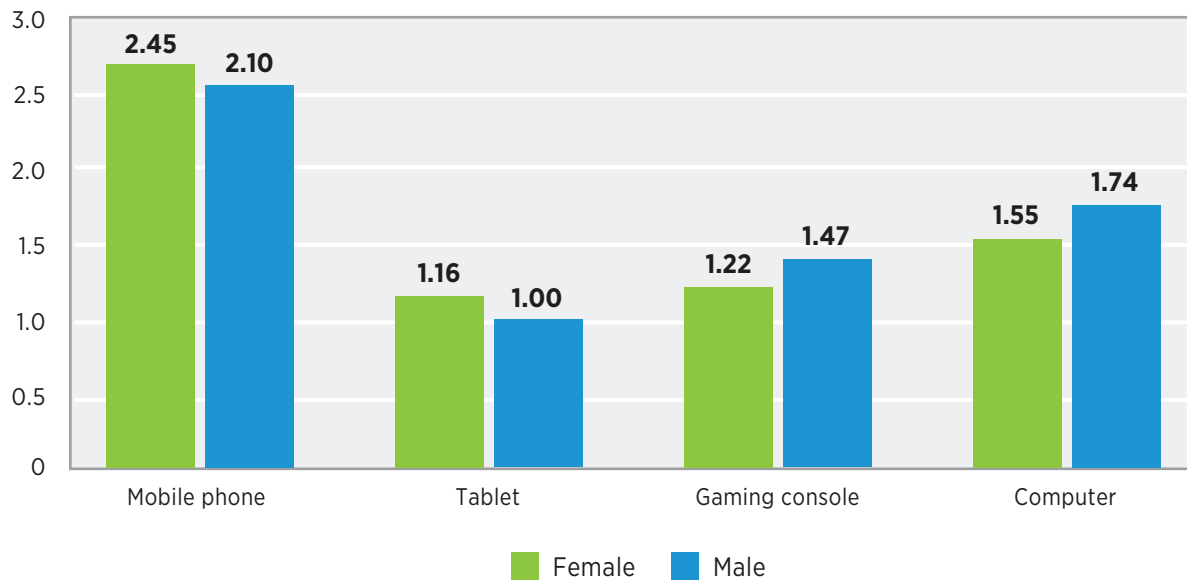
Figure 8: How much of your total time playing video games is on the following devices? (Scale 0-4)

GAMERS ARE FRUSTRATED BY SLOW DOWNLOADS

Globally, 87 percent of gamers find the *process of downloading* video games frustrating, increasing slightly (two percent) since 2019. In India, that number was 94 percent. The *length of time it takes to download* games was noted as the top issue globally, with 32 percent noting this as their primary issue. Frustration with *download speeds* is highest in India where 41 percent of gamers report slow downloads as their top concern. Gamers in Germany noted *downloads that don't work* as their primary frustration. In France, Italy, Korea, and Singapore, *downloads being interrupted* and *having to start over again* was the top issue.

Country	I don't find it frustrating	The length of time it takes to download	When it doesn't work	When the download process is interrupted and I have to start over again
France	10.4%	30.7%	26.3%	32.6%
Germany	28.6%	27.9%	33.0%	10.5%
India	6.0%	40.6%	17.8%	35.6%
Italy	13.3%	17.3%	33.3%	36.1%
Japan	19.0%	37.8%	25.1%	18.1%
South Korea	13.5%	31.7%	20.1%	34.8%
Singapore	10.4%	28.8%	30.1%	30.7%
United Kingdom	13.5%	35.7%	28.5%	22.4%
United States	16.0%	36.9%	25.8%	21.3%
Global	**14.3%**	**31.9%**	**26.6%**	**27.2%**

Figure 9: What is the most frustrating part of downloading video games?

Frustrations with download speeds are the biggest issue for gamers 18-45, and for gamers 46 and older, downloads that don't work is the biggest issue.

Age	I don't find it frustrating	The length of time it takes to download	When it doesn't work	When the download process is interrupted and I have to start over again
18-25 years old	12.2%	42.2%	21.6%	24.1%
26-35 years old	9.1%	37.6%	23.1%	30.2%
36-45 years old	11.3%	34.4%	26.0%	28.3%
46-60 years old	16.9%	26.7%	30.1%	26.4%
Over 60 years old	20.7%	23.3%	29.2%	26.8%
All ages	**14.3%**	**31.9%**	**26.6%**	**27.2%**

Figure 10: What is the most frustrating part of downloading video games?

Both expert gamers and aspiring professionals have the most frustration with *download speed,* with 41 percent of experts and 58 percent of aspiring professionals noting this as their primary frustration. This is because experienced gamers are more likely to play more complex games that require larger downloads, so download performance has a greater impact on their gaming experience. For casual gamers, *download speed* wasn't as critical, but *when downloads don't work* ranked close to equal with *download speed*. This could be due to this level of gamer being less technically astute than experts and therefore struggling more with the download process. Novices also noted *download speed* as their primary frustration.

Gamer type	I don't find it frustrating	The length of time it takes to download	When it doesn't work	When the download process is interrupted and I have to start over again
Aspiring professional	7.8%	58.1%	10.9%	23.3%
Expert	11.0%	41.4%	18.8%	28.9%
Casual gamer	14.2%	28.7%	29.1%	28.0%
Novice	18.6%	28.9%	28.3%	24.1%
All	14.3%	31.9%	26.6%	27.2%

Figure 11: What is the most frustrating part of downloading video games?

CASUAL SINGLE-PLAYER GAMES ARE MOST POPULAR

Globally, Casual Single-Player games like Candy Crush, Angry Birds and Spider Solitaire, and First-person shooter games such as Call of Duty, Destiny 2 and Overwatch, remain the first and second most popular type of video game. In the past year, these types of games increased in popularity by more than 12 percent and over ten percent respectively in the past year. These were followed by Casual Multiplayer games such as Words With Friends, Single-Player Role-play games like The Elder Scrolls Online, Battle Royale games like Fortnite and PUBG, Multiplayer Online Battle Arena games including League of Legends and DOTA 2, and Massively Multiplayer Online Role-Playing Games such as World of Warcraft.

Country	Battle Royale games (e.g. Fortnite)	Casual multiplayer video games (e.g. Words With Friends)	Casual single-player video games (e.g. Candy Crush or Angry Birds)	First-person shooter video games (e.g. Call of Duty)	Massively Multiplayer Online Role-Playing games (e.g. World of Warcraft)	Multiplayer Online Battle Arena games video games (e.g. League of Legends, DOTA 2)	Single-player role-play video games (e.g. The Elder Scrolls)
France	1.15	1.02	2.15	1.33	0.88	0.90	0.92
Germany	0.88	0.92	1.99	1.15	0.94	0.84	1.05
India	1.79	1.77	2.15	1.82	1.54	1.60	1.56
Italy	1.25	1.23	1.89	1.34	1.12	1.19	1.22
Japan	0.72	0.75	1.72	0.80	0.64	0.58	1.09
South Korea	1.27	1.38	1.57	1.47	1.10	1.39	1.36
Singapore	1.13	1.24	1.97	1.36	1.07	1.13	1.15
U.K.	0.90	1.14	2.09	1.30	0.77	0.80	1.05
U.S.	0.89	1.23	2.22	1.26	0.83	0.77	1.08
Global	1.11	1.19	1.97	1.32	0.99	1.02	1.16

Figure 12: How much of your time playing video games is spent playing each of the following types of games? (Scale 0-4)

Although Casual Single-Player games are the most played game type across all age groups, gamers 18-25 continue to prefer First-Person Shooter and Battle Royale games, and these games strengthened their popularity in this age group by as much as 23 percent compared to 2019. Gamers 46 and older show a clear preference for casual single-player games, and their popularity also increased nearly 15 percent in the past year.

| Age	Battle Royale games	Casual multiplayer video games	Casual single-player video games	First-person shooter video games	Massively Multiplayer Online role-playing games	Multiplayer Online Battle Arena games video games	Single-player role-play video games
18-25 years old	1.63	1.43	1.53	1.81	1.16	1.40	1.38
26-35 years old	1.54	1.56	1.91	1.74	1.43	1.41	1.62
36-45 years old	1.30	1.36	2.10	1.50	1.23	1.24	1.35
46-60 years old	0.91	1.06	2.09	1.12	0.83	0.85	1.01
Over 60 years old	0.49	0.72	2.03	0.71	0.49	0.47	0.67
All ages	**1.11**	**1.19**	**1.97**	**1.32**	**0.99**	**1.02**	**1.16**

Figure 13: How much of your time playing video games is spent playing each of the following types of games? (Scale 0-4)

Both women and men play Casual Single-Player games more than any other game type. Coming in second for women is Casual Multiplayer games and for men, First-Person Shooter games. The largest gaps in playing time between men and women is with Casual Single-Player games and First-Person Shooter.

Gender	Battle Royale games	Casual multiplayer video games	Casual single-player video games	First-person shooter video games	Massively Multiplayer Online role-playing games	Multiplayer Online Battle Arena games video games	Single-player role-play video games
Female	0.95	1.22	2.22	1.10	0.90	0.90	1.08
Male	1.26	1.15	1.73	1.52	1.07	1.14	1.25
All	**1.11**	**1.19**	**1.97**	**1.32**	**0.99**	**1.02**	**1.16**

Figure 14: How much of your time playing video games is spent playing each of the following types of games? (Scale 0-4)

The line graph below clearly shows how closely the gaming preferences for experts and aspiring professionals for First-Person Shooter, Multiplayer and Battle Royal games track across the variety of game types. Likewise, casual and novice gamers both prefer Casual Single-Player games.
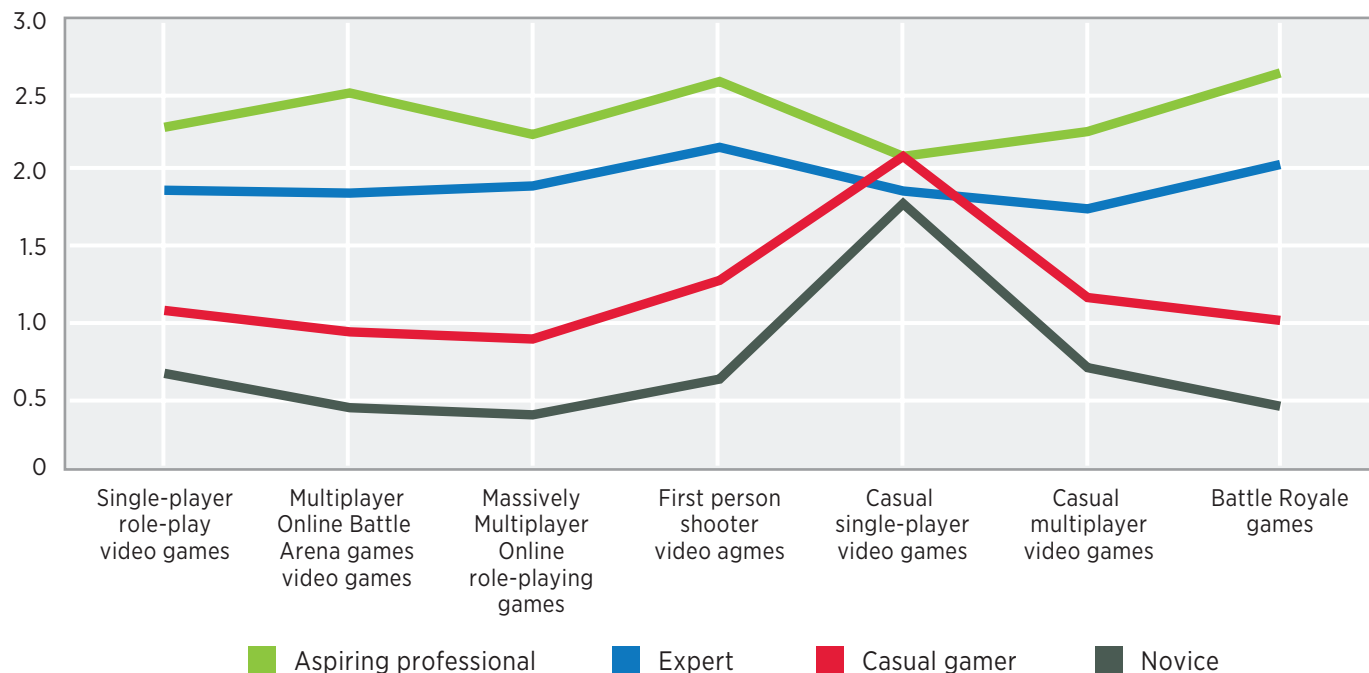
Figure 15: How much of your time playing video games is spent playing each of the following types of games? (Scale 0-4)

WATCHING OTHER GAMERS PLAY ONLINE IS POPULAR WITH YOUNGER GAMERS

People who play video games are spending less time watching traditional sports, both online and on traditional broadcast TV. The hours watching traditional sports online went from 2.37 hours per week in 2019, to 2.26 hours this year, down five percent. The hours watching sports on TV went from 3.08 hours per week in 2019, to 2.79 hours this year, down ten percent. Watching other people play video games online such as on Twitch or YouTube, has also fallen six percent from 2.43 hours per week in 2019, to 2.29 hours this year. Major esports tournaments have maintained their popularity.

Globally, gamers spend 32 minutes more per week watching traditional sports on television than watching traditional sports programming online or watching other players stream games online on gaming sites like Twitch. However, in Japan and South Korea, gamers watch other people play video games online more than they watch traditional broadcast sports.

Country	Watching traditional sports online	Watching esports tournaments (such as The International or LoL World Championship)	Watching other people play video games online (such as Twitch or YouTube gaming)	Watching traditional sports on television
France	1.91	1.41	2.24	2.40
Germany	2.01	1.59	1.97	2.29
India	4.50	3.60	3.98	4.67
Italy	2.35	1.69	2.06	2.76
Japan	1.03	1.07	2.01	1.60
South Korea	2.23	1.92	2.67	2.57
Singapore	2.05	1.73	2.18	2.20
United Kingdom	2.01	1.16	1.71	2.86
United States	2.25	1.34	1.78	3.77
Global	**2.26**	**1.72**	**2.29**	**2.79**

Figure 16: How many hours each week do you do the following?

Gamers 18-25 watch more traditional sports online than on television, and gamers 18-35 top viewing choice is watching people play video games online.

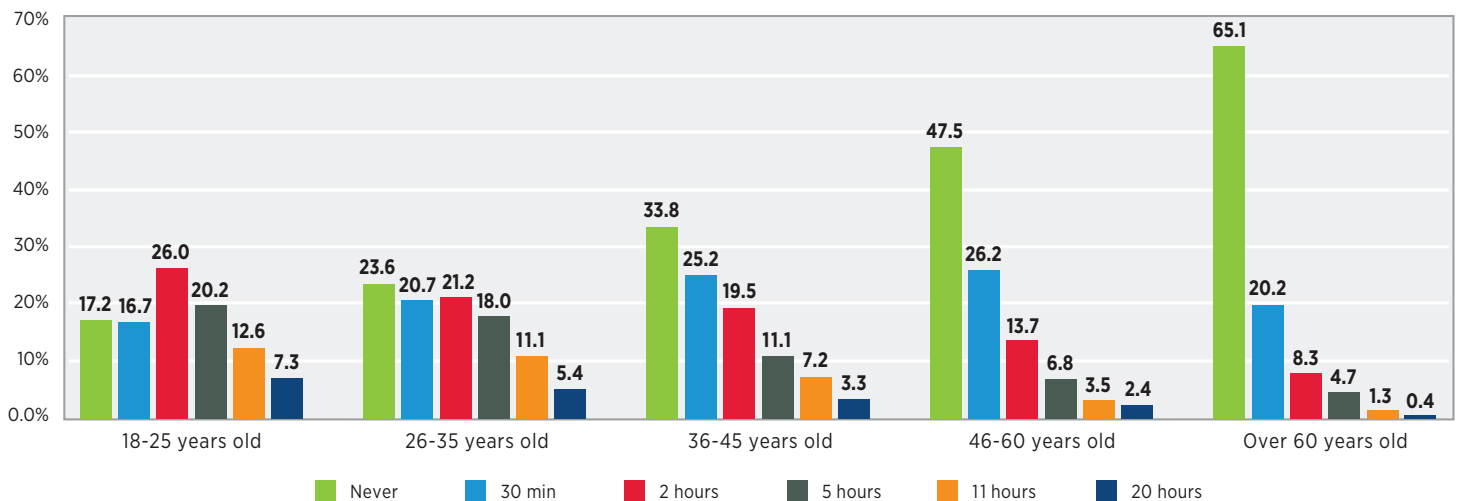| Age	Watching traditional sports online	Watching esports tournaments (such as The International or LoL World Championship)	Watching other people play video games online (such as Twitch or YouTube gaming)	Watching traditional sports on television
18-25 years old	2.60	2.20	4.12	2.57
26-35 years old	3.06	2.76	3.51	3.31
36-45 years old	2.73	2.08	2.45	3.08
46-60 years old	1.94	1.32	1.60	2.76
Over 60 years old	1.38	0.74	0.81	2.28
All ages	**2.26**	**1.72**	**2.29**	**2.79**

Figure 17: How many hours each week do you do the following?

Half (51 percent) of gamers globally watch other people play online weekly. However, viewing rates vary greatly by country, with nearly 80 percent of gamers in India watching weekly but just 46 percent in Japan doing so.

Country	Never	30 min	2 hours	5 hours	11 hours	20 hours	Average Viewing Hours per Week
France	40.9%	23.3%	15.7%	9.9%	7.4%	2.8%	2.31
Germany	46.5%	21.8%	14.2%	8.8%	5.8%	2.8%	2.04
India	20.6%	24.4%	18.6%	15.4%	12.4%	8.6%	4.35
Italy	37.0%	24.8%	19.4%	11.4%	5.8%	1.6%	2.04
Japan	53.6%	16.8%	12.4%	7.4%	5.4%	4.4%	2.18
South Korea	25.0%	28.0%	21.2%	16.4%	5.8%	3.6%	2.74
Singapore	33.1%	27.2%	19.6%	12.7%	4.9%	2.5%	2.19
United Kingdom	51.2%	18.2%	15.0%	9.0%	4.8%	1.8%	1.73
United States	52.2%	17.8%	14.2%	8.4%	4.8%	2.6%	1.84
Global	51.4%	18.1%	14.6%	9.1%	4.5%	2.3%	2.38

Figure 18: How many hours each week do you watch other people play video games online (such as Twitch or YouTube Gaming)?

Not surprisingly, popularity of watching others play video games is at its highest with the youngest age groups.

Figure 19: How many hours each week do you watch other people play video games online (such as Twitch or YouTube Gaming)?

Globally the number of gamers watching traditional sports on television remained the same year over year. The two countries with the highest average hours of TV sports viewing are India and the U.S., while Japan has the lowest average viewing hours. The overall global average hours fell from three hours five minutes in 2019 to two hours 54 minutes this year, a six percent drop.

Country	Never	30 min	2 hours	5 hours	11 hours	20 hours	Average Hours
France	28.2%	21.7%	28.8%	13.7%	5.0%	2.6%	2.44
Germany	32.5%	19.8%	26.5%	13.4%	6.2%	1.6%	2.30
India	9.2%	17.4%	27.6%	23.6%	12.6%	9.6%	5.13
Italy	22.6%	22.0%	27.6%	18.8%	6.8%	2.2%	2.79
Japan	44.4%	23.8%	18.6%	8.6%	2.8%	1.8%	1.59
South Korea	26.0%	24.2%	25.6%	15.6%	5.6%	3.0%	2.63
Singapore	28.2%	26.6%	26.0%	12.9%	4.1%	2.3%	2.20
United Kingdom	26.4%	19.2%	24.6%	19.6%	7.4%	2.8%	2.94
United States	25.2%	12.6%	23.4%	20.6%	13.0%	5.2%	4.03
Global	27.0%	20.8%	25.4%	16.3%	7.1%	3.5%	2.90

Figure 20: How many hours each week do you watch traditional sports on television?

Younger gamers are moving away from watching traditional sports on television. This trend, combined with the five percent drop in watching sports online, will have a major impact on the value of broadcast sports rights in the near future.

Age	Never	30 min	2 hours	5 hours	11 hours	20 hours	Average Hours
18-25 years old	35.2%	19.1%	20.5%	15.3%	6.1%	3.8%	2.70
26-35 years old	23.8%	16.9%	24.9%	20.7%	9.9%	3.8%	3.47
36-45 years old	22.1%	20.8%	27.5%	17.9%	7.4%	4.3%	3.23
46-60 years old	24.9%	22.7%	26.8%	15.5%	6.4%	3.6%	2.86
Over 60 years old	31.3%	22.7%	25.2%	12.9%	6.0%	1.9%	2.29
All ages	27.0%	20.8%	25.4%	16.3%	7.1%	3.5%	2.90

Figure 21: How many hours each week do you watch traditional sports on television?

Female gamers are less likely to watch broadcast sports than males, and they watch one hour and 10 minutes less per week.

Gender	Never	30 min	2 hours	5 hours	11 hours	20 hours	Average Hours
Female	33.7%	23.0%	22.7%	12.9%	5.0%	2.7%	2.31
Male	20.5%	18.7%	28.0%	19.6%	9.1%	4.2%	3.47
All	27.0%	20.8%	25.4%	16.3%	7.1%	3.5%	2.90

Figure 22: How many hours each week do you watch traditional sports on television?

Gamers age 26-35 watch the most esports tournaments, and the highest average hours of weekly viewing. Gamers older than 46 watch the least esports.

| Age	Never	30 min	2 hours	5 hours	11 hours	20 hours	Average Hours
18-25 years old	46.3%	16.7%	15.3%	12.3%	5.9%	3.5%	2.35
26-35 years old	36.1%	16.5%	20.5%	14.2%	8.5%	4.2%	2.98
36-45 years old	43.2%	19.0%	17.6%	12.5%	4.9%	2.8%	2.18
46-60 years old	55.5%	20.7%	12.7%	6.4%	3.3%	1.4%	1.32
Over 60 years old	69.9%	15.9%	9.0%	3.2%	1.4%	0.7%	0.70
All ages	51.4%	18.1%	14.6%	9.1%	4.5%	2.3%	1.79

Figure 23: How many hours each week do you watch esports tournaments?

Gamers age 26-35 are most likely to watch sports online, and have the highest average hours of weekly viewing. Gamers older than 60 watch the least sports online and have the lowest average weekly viewing hours.

Age	Never	30 min	2 hours	5 hours	11 hours	20 hours	Average Hours
18-25 years old	38.1%	19.1%	16.7%	15.6%	6.4%	4.1%	2.74
26-35 years old	30.5%	14.2%	24.2%	18.1%	9.6%	3.5%	3.21
36-45 years old	31.2%	20.4%	22.1%	15.7%	6.9%	3.8%	2.85
46-60 years old	39.4%	22.2%	20.9%	11.5%	4.3%	1.8%	1.94
Over 60 years old	51.2%	20.0%	17.0%	8.1%	2.7%	1.0%	1.34
All ages	38.5%	19.5%	20.3%	13.3%	5.7%	2.6%	2.32

Figure 24: How many hours each week do you watch traditional sports online?

Female gamers consistently spend less time watching traditional sports, online sports, esports and others play online.
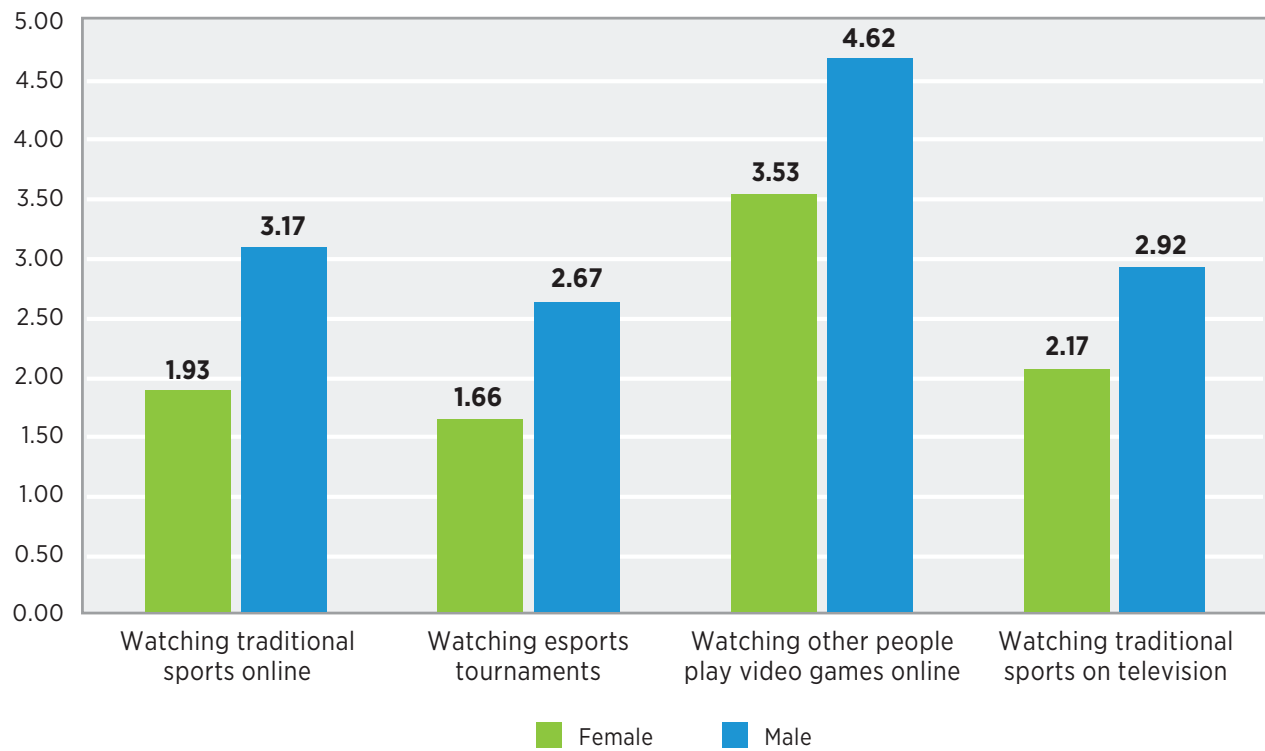
Figure 25: How many hours each week do you do the following?

PERFORMANCE IS CRITICAL TO GAMERS

Gamers rated the importance of various aspects of playing video games. In every country except Japan, France, the U.K and the U.S., *fast performance* is the most critical aspect of playing a video game, followed by *simple gameplay*, the *ability to play offline*, *interesting storyline* and *ability to interact with other players*.

Country	Interesting storyline – the characters and story are exciting	Able to play the game while disconnected from the internet	Fast performance – the games load quickly and performance is speedy	I am able to interact with other players	Simple gameplay – the game is easy to learn and play
France	2.58	2.48	2.53	2.06	2.49
Germany	2.35	2.34	2.45	1.91	2.39
India	2.72	2.58	2.87	2.57	2.86
Italy	2.56	2.62	2.69	2.28	2.58
Japan	2.57	2.47	2.60	1.48	2.68
South Korea	2.40	2.32	2.59	2.20	2.50
Singapore	2.25	2.42	2.61	1.89	2.44
U.K.	2.43	2.51	2.63	1.64	2.69
U. S.	2.40	2.52	2.60	1.73	2.67
Global	**2.47**	**2.48**	**2.62**	**1.97**	**2.59**

Figure 26: How important are each of the following when playing a video game? (Scale 0-4)

Fast performance is the top priority of gamers 46 and under.

Age	Interesting storyline - the characters and story line are exciting	Able to play the game while disconnected from the internet	Fast performance - games load quickly and performance is speedy	I am able to interact with other players	Simple gameplay
18-25 years old	2.61	2.45	2.71	2.35	2.43
26-35 years old	2.68	2.53	2.67	2.32	2.58
36-45 years old	2.59	2.53	2.72	2.11	2.63
46-60 years old	2.41	2.52	2.62	1.87	2.64
Over 60 years old	2.18	2.33	2.43	1.44	2.60
All ages	**2.47**	**2.48**	**2.62**	**1.97**	**2.59**

Figure 27: How important are each of the following when playing a video game?

Performance is the leading issue for both men and women. *Simple gameplay* was the second most important.

Gender	Interesting storyline	Able to play the game while disconnected from the internet	Fast performance – games load quickly and performance is speedy	Able to interact with other players	Simple gameplay
Female	2.45	2.52	2.65	1.85	2.65
Male	2.49	2.43	2.59	2.09	2.53
All	**2.47**	**2.48**	**2.62**	**1.97**	**2.59**

Figure 28: How important are each of the following when playing a video game?

MOST GAMERS HAVE PLAYED FOR MORE THAN FOUR HOURS CONSECUTIVELY

Globally, gamers reported their average longest consecutive playing session lasted four hours, 36 minutes, a seven percent increase over 2019. However, longest playing session times range from a low of 3.36 hours in South Korea to 5.33 hours in Japan where 8.6 percent have played for more than 15 hours consecutively.

Country	Up to 1 hour	1-3 hours	3-5 hours	5-10 hours	10-15 hours	More than 15 hours	Average longest duration
France	15.5%	29.4%	24.6%	18.7%	5.0%	6.8%	4.78
Germany	12.8%	28.3%	24.7%	19.0%	7.6%	7.6%	5.20
India	19.6%	32.4%	24.6%	14.4%	5.2%	3.8%	4.13
Italy	17.0%	29.4%	32.0%	17.2%	4.0%	0.4%	3.89
Japan	17.0%	22.6%	22.6%	22.8%	6.4%	8.6%	5.33
South Korea	27.2%	37.4%	19.2%	10.2%	3.6%	2.4%	3.36
Singapore	12.5%	31.3%	29.0%	14.7%	7.6%	4.9%	4.70
United Kingdom	13.4%	27.0%	26.2%	21.4%	8.6%	3.4%	4.91
United States	12.4%	26.8%	27.0%	19.8%	7.6%	6.4%	5.14
Global	16.4%	29.4%	25.5%	17.6%	6.2%	4.9%	4.60

Figure 29: What is the longest you have ever consecutively played video games at one time?

Younger gamers have longer consecutive playing times than older gamers, and the longest average duration of six hours and 34 minutes for ages 18-25 is up 11 percent over 2019.

Age	Up to 1 hour	1-3 hours	3-5 hours	5-10 hours	10-15 hours	More than 15 hours	Average longest duration
18-25 years old	6.7%	17.0%	26.3%	28.7%	9.9%	11.5%	6.56
26-35 years old	5.3%	22.3%	32.2%	24.9%	9.9%	5.4%	5.70
36-45 years old	11.1%	25.5%	29.4%	20.1%	8.5%	5.4%	5.18
46-60 years old	18.2%	35.0%	24.1%	14.8%	4.2%	3.8%	4.04
Over 60 years old	34.9%	39.5%	17.8%	5.4%	1.2%	1.2%	2.58
All ages	16.4%	29.4%	25.5%	17.6%	6.2%	4.9%	4.60

Figure 30: What is the longest you have ever consecutively played video games at one time?

Not only do male gamers watch more game play online than female gamers, they also play an hour and nine minutes per week more than females.

Gender	Up to 1 hour	1-3 hours	3-5 hours	5-10 hours	10-15 hours	More than 15 hours	Average longest duration
Female	18.7%	33.2%	25.8%	14.6%	5.0%	2.8%	4.02
Male	14.2%	25.7%	25.3%	20.5%	7.3%	7.0%	5.17
All	16.4%	29.4%	25.5%	17.6%	6.2%	4.9%	4.60

Figure 31: What is the longest you have ever consecutively played video games at one time?

Not surprisingly, aspiring pros and experts have longer consecutive playing times than casual or novice gamers. The average aspiring pro's longest session averages eight hours, 25 minutes. It is worth noting the consistency of play time between aspiring professionals and experts. More than half of casual gamers and novices have never played for more than 3 hours at a time.

Gamer Type	Up to 1 hour	1-3 hours	3-5 hours	5-10 hours	10-15 hours	More than 15 hours	Average Hours
Aspiring professional	5.1%	8.8%	23.4%	22.6%	19.0%	21.2%	**8.41**
Expert	1.8%	13.5%	28.7%	31.2%	12.8%	12.1%	**7.19**
Novice	34.7%	36.0%	15.9%	8.6%	2.5%	2.3%	**4.27**
Casual gamer	14.3%	32.5%	28.3%	16.8%	5.0%	3.0%	**3.00**
All	**16.4%**	**29.4%**	**25.5%**	**17.6%**	**6.2%**	**4.9%**	**4.60**

Figure 32: What is the longest you have ever consecutively played video games at one time?

GAMING CAN INTERFERE WITH DAILY ACTIVITIES

Gamers from novices to aspiring professionals all experience gaming sessions that cause them to miss miss normal daily activities. Across all the counties surveyed, *missed sleep* is most pervasive, with a global average above half of gamers and Singapore leading the way at almost 60 percent missing sleep. *Skipping a meal* is the second most reported daily activity missed due to long game playing closely followed by *time to socialize with friends*. In 2019, German gamers missed the most meals, but this year gamers in India took the top spots in missing meals, showers and work to play games. Italians missed the least time from work, and U.K. gamers skipped the fewest meals.

| Country	Missed work	Missed time to socialize	Missed sleep	Missed a shower	Missed a meal
France	9.1%	28.8%	59.2%	21.3%	**9.1%**
Germany	9.0%	24.6%	49.1%	17.0%	**9.0%**
India	29.8%	35.6%	49.2%	29.2%	**29.8%**
Italy	6.6%	35.6%	45.8%	19.8%	**6.6%**
Japan	8.6%	4.4%	55.2%	27.0%	**8.6%**
South Korea	14.6%	28.0%	54.4%	15.4%	**14.6%**
Singapore	12.9%	36.0%	59.7%	24.3%	**12.9%**
United Kingdom	7.4%	22.4%	59.0%	23.0%	**7.4%**
United States	8.8%	23.0%	59.0%	23.8%	**8.8%**
Global	**11.9%**	**26.5%**	**54.5%**	**22.3%**	**31.7%**

Figure 33: What daily activities have you missed due to playing a video game? (Select all that apply)

Age does not have a strong correlation with missed activities, but younger gamers are more likely to miss a meal, work or a shower to play a video game.

Age	Missed work	Missed time to socialize	Missed sleep	Missed a shower	Missed a meal
18-25 years old	15.0%	31.1%	52.1%	34.6%	38.9%
26-35 years old	20.0%	26.6%	51.7%	28.5%	38.2%
36-45 years old	16.4%	27.3%	55.0%	24.5%	33.3%
46-60 years old	7.6%	25.1%	56.8%	17.5%	29.2%
Over 60 years old	4.7%	24.5%	54.9%	13.4%	23.1%
All	**11.9%**	**26.5%**	**54.5%**	**22.3%**	**31.7%**

Figure 34: What daily activities have you missed due to playing a video game? (Select all that apply)

Not surprisingly, aspiring professionals are most likely to miss activities across the board, with the exception of sleep.
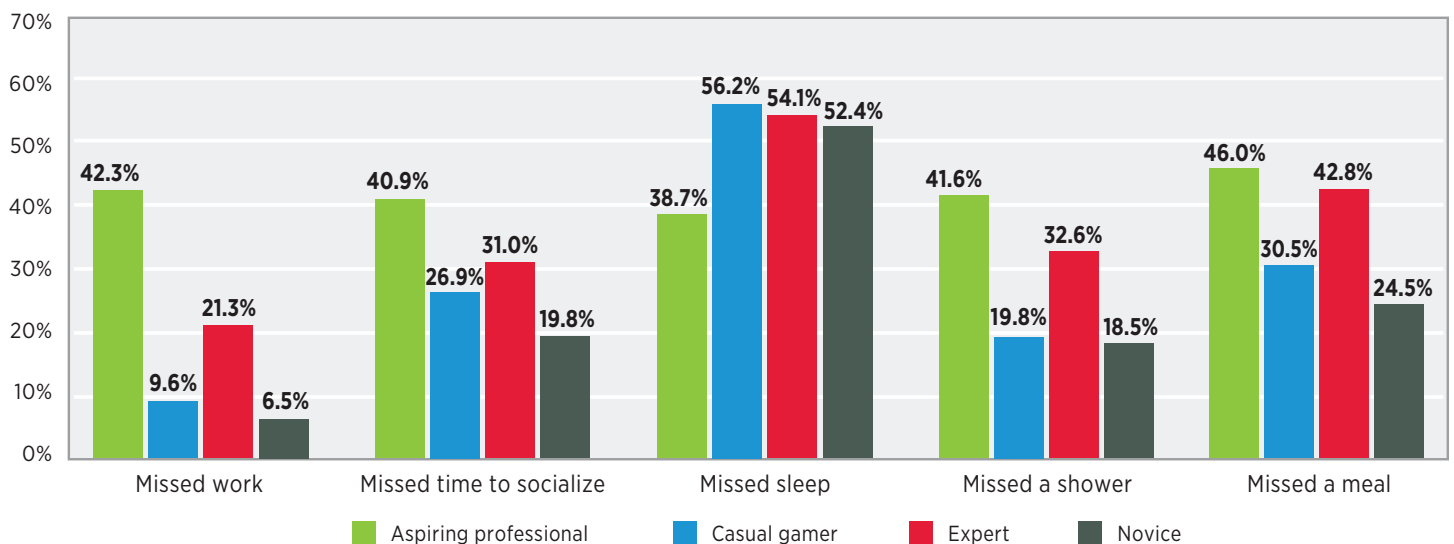
Figure 35: What daily activities have you missed due to playing a video game? (Select all that apply)

ONE-THIRD OF GAMERS PLAY AT WORK

More than one-third (34 percent) of gamers play video games during work. Daily play is up 16 percent compared to 2019. The highest rate is in India where 57 percent play during work, and the lowest is in Italy at 21 percent.

Country	I never play video games during work	I play video games during work daily	I play video games during work once a month	I play video games during work once a week
France	69.9%	7.6%	12.7%	9.9%
Germany	75.5%	5.7%	9.4%	9.4%
India	43.3%	29.6%	10.9%	16.2%
Italy	78.8%	3.2%	9.0%	9.0%
Japan	77.9%	6.5%	9.1%	6.5%
South Korea	68.8%	7.3%	8.7%	15.3%
Singapore	62.1%	13.3%	10.4%	14.3%
United Kingdom	67.9%	7.4%	13.6%	11.1%
United States	59.3%	13.8%	11.8%	15.2%
Global	66.3%	11.0%	10.6%	12.1%

Figure 36: How often do you play video games during work?

Gamers 18-45 are most likely to play at work. Less than 19 percent of gamers over 60 who are employed play at work.

Age	I never play video games during work	I play video games during work daily	I play video games during work once a month	I play video games during work once a week
18-25 years old	55.2%	12.6%	15.8%	16.4%
26-35 years old	54.2%	15.6%	16.3%	13.8%
36-45 years old	60.4%	13.2%	11.7%	14.7%
46-60 years old	76.7%	7.7%	6.4%	9.2%
Over 60 years old	81.3%	6.3%	4.6%	7.8%
All	66.3%	11.0%	10.6%	12.1%

Figure 37: How often do you play video games during work?

MORE THAN 38 PERCENT OF GAMERS WOULD LIKE TO BECOME PROFESSIONALS

Prize money from gaming tournaments is approaching salaries in traditional professional sports, resulting in people considering video gaming as a possible professional career. Nearly two-fifths (38 percent)" of global gamers would quit their jobs and become professional gamers if they could support themselves by doing so, an increase of seven percent in the past year. India had the highest percentage of gamers wanting to turn pro at 53 percent. Japan had the lowest number considering a professional career at just 17 percent.

Country	No	Yes
France	63.8%	36.2%
Germany	65.0%	35.0%
India	47.3%	52.7%
Italy	56.4%	43.6%
Japan	83.2%	16.8%
South Korea	62.3%	37.7%
Singapore	67.4%	32.6%
United Kingdom	54.1%	45.9%
United States	56.8%	43.2%
Global	61.6%	38.4%

Figure 38: Would you quit your job if you could support yourself as a professional video game player?

Younger gamers are most interested in the prospect of becoming professionals, with 53 percent of those 18-35 wanting to turn pro.
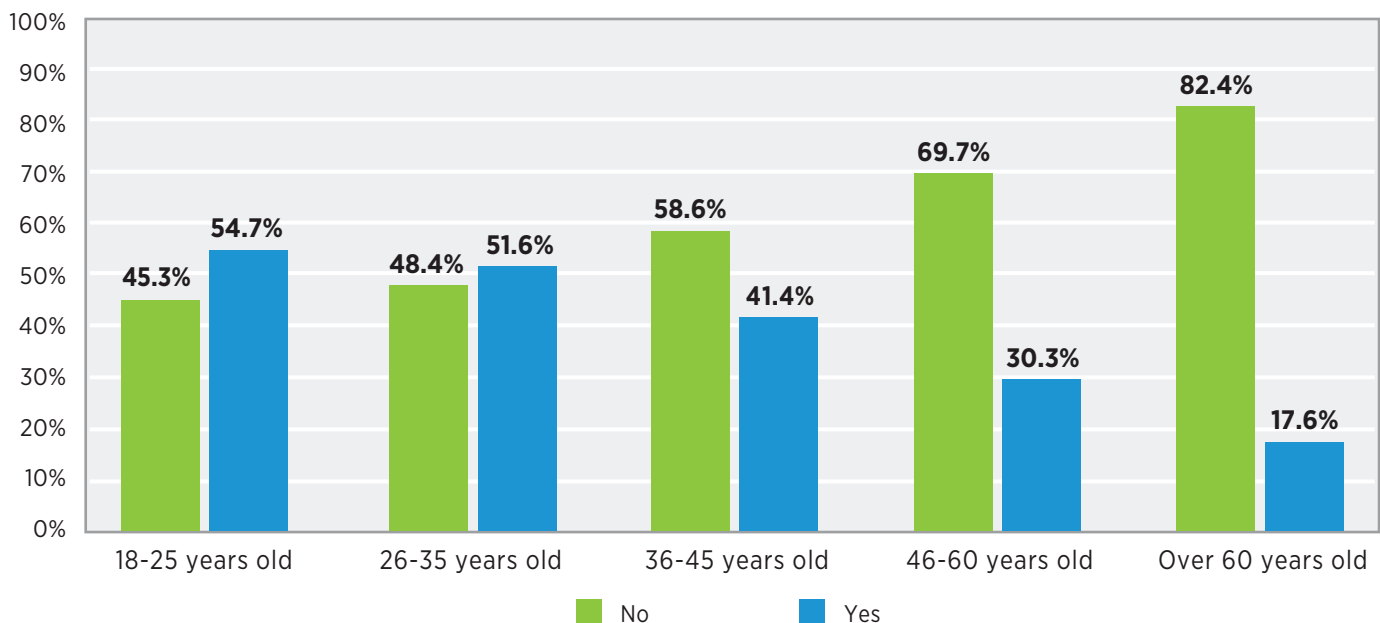
Figure 39: Would you quit your job if you could support yourself as a professional video game player?

Just as men play games more than females, they are much more interested in a career as a professional gamer than women, with 41 percent of men willing to quit their jobs and become professional gamers compared to just 29 percent of women. Both figures are up over seven percent since 2019.

Gender	No	Yes
Female	70.9%	29.1%
Male	58.8%	41.2%
All	61.6%	38.4%

Figure 40: Would you quit your job if you could support yourself as a professional video game player?

CONSOLE-LESS GAMING SERVICES ARE GAINING TRACTION

Forty-four percent of gamers are interested in console-less gaming. Gamers in India are significantly more interested in console-less gaming than those in other countries, with almost 83 percent willing to subscribe. Japanese gamers were least interested with only 21 percent willing to subscribe.

Country	No	Yes
France	63.3%	36.7%
Germany	67.5%	32.5%
India	17.2%	82.9%
Italy	51.2%	48.8%
Japan	79.1%	20.9%
South Korea	49.0%	51.0%
Singapore	54.3%	45.7%
United Kingdom	67.3%	32.7%
United States	61.7%	38.3%
Global	56.0%	44.0%

Figure 41: When available in your area, would you subscribe to a live streaming console-less gaming service (such as Google Stadia)?

Younger gamers age 18-45 are most interested in subscribing to console-less gaming services. Only 41 percent of those 46-60 and 23 percent over 60 have interest in console-less gaming.
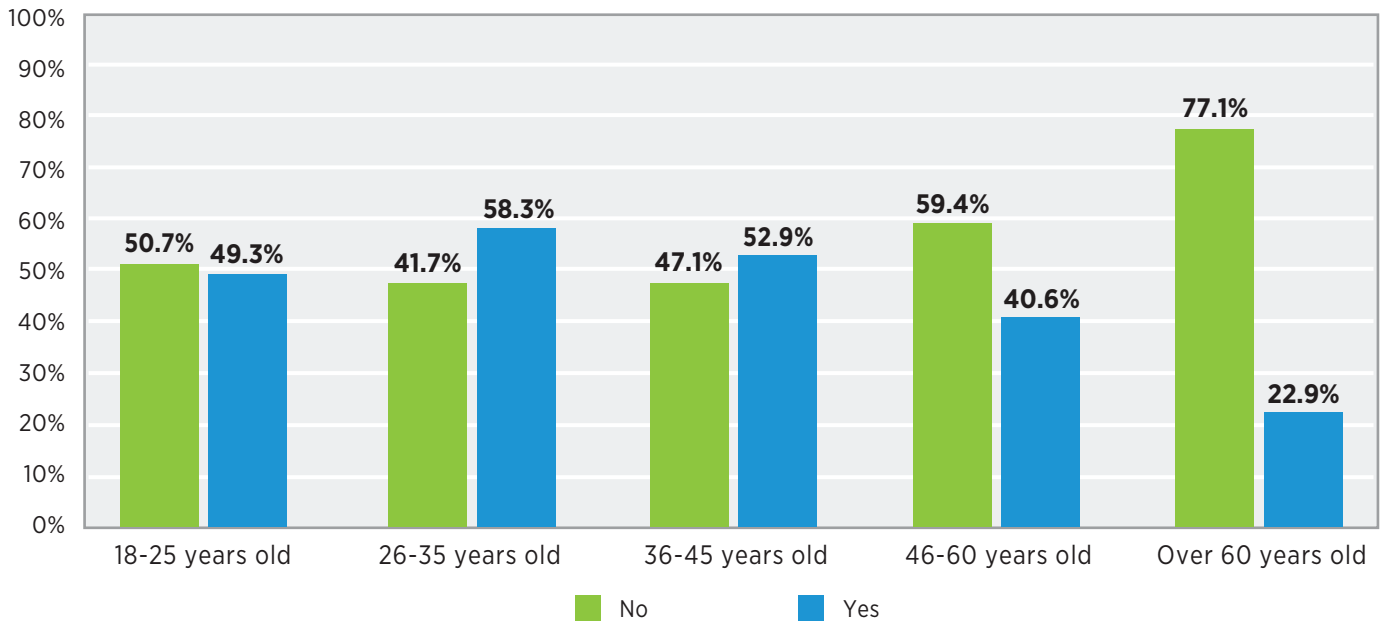
Figure 42: When available in your area, would you subscribe to a live streaming console-less gaming service (such as Google Stadia)?

Expert and aspiring gamers are the most interested in subscribing to console-less gaming services.

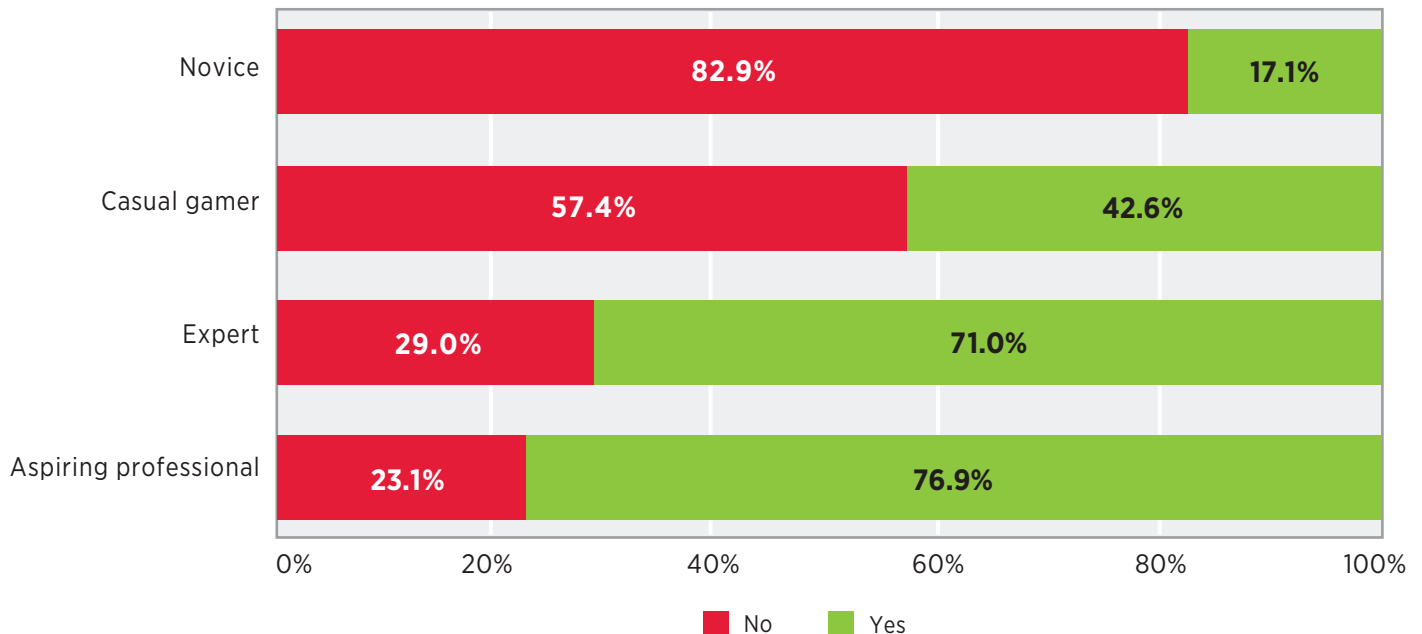**Figure 43:** When available in your area, would you subscribe to a live streaming console-less gaming service (such as Google Stadia)?

THE STATE OF ONLINE GAMING – 2020

PRICE IS A MAJOR FACTOR IN SUBSCRIBING TO A CONSOLE-LESS GAMING SERVICE

Price sensitivity is the dominant reason gamers globally cite as most likely to prevent subscribing to a console-less service, followed by performance issues such as latency.

Country	Content (the content offering is too limited)	Performance (there are performance issues / delays)	Price (the cost is too high)	Privacy (I don't think the service is secure)
France	13.6%	15.3%	60.3%	10.8%
Germany	12.4%	21.2%	49.3%	17.1%
India	9.3%	28.0%	52.6%	10.2%
Italy	13.5%	24.2%	54.3%	8.1%
Japan	6.1%	19.4%	52.9%	21.6%
South Korea	17.8%	24.6%	46.5%	11.1%
Singapore	11.5%	16.1%	62.7%	9.7%
United Kingdom	9.5%	16.1%	65.6%	8.8%
United States	8.0%	17.7%	66.8%	7.6%
Global	**11.4%**	**20.3%**	**57.2%**	**11.2%**

Figure 44: Of the following options, which is most likely to prevent you from subscribing to a live streaming console-less gaming service (such as Google Stadia)?

Performance concerns are the secondary issue for gamers 18-45 that could prevent them from subscribing to a service.
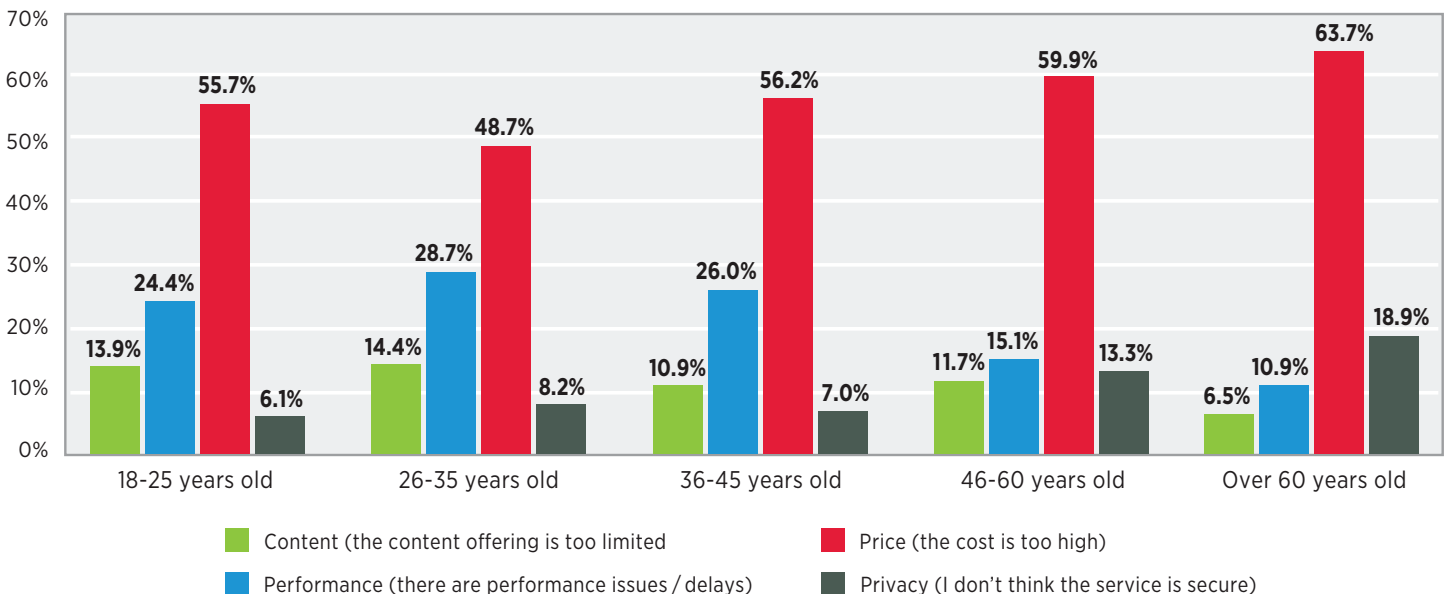
Figure 45: Of the following options, which is most likely to prevent you from subscribing to a live streaming console-less gaming service (such as Google Stadia)?

As you might expect, aspiring professionals and experts put performance above other non-pricing concerns for their willingness to subscribe to console-less gaming services.
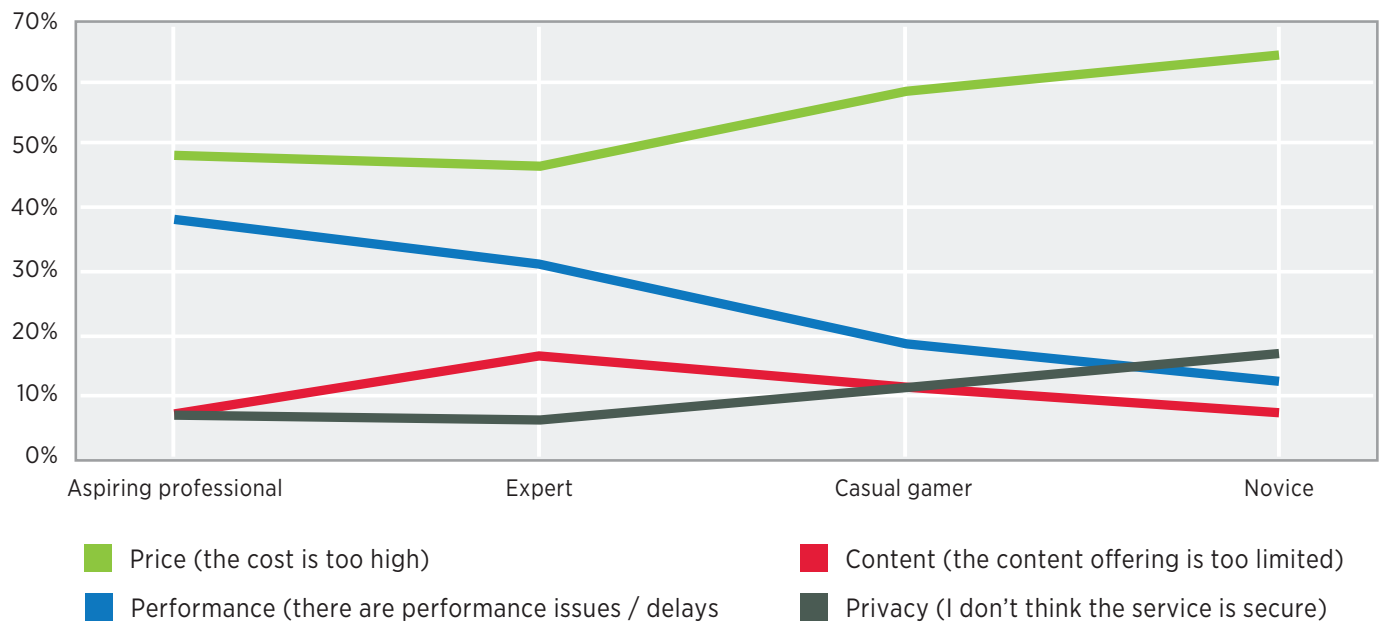

Figure 46: Of the following options, which is most likely to prevent you from subscribing to a live streaming console-less gaming service (such as Google Stadia)?

YOUNGER GAMERS PREFER VIDEO GAMES VERSUS WATCHING TV AND MOVIES

In most of the countries surveyed, the preference for playing games or watching movies or TV shows is a toss-up, except in India, where there is a strong preference for game play, and Japan where most would rather watch TV shows and movies.
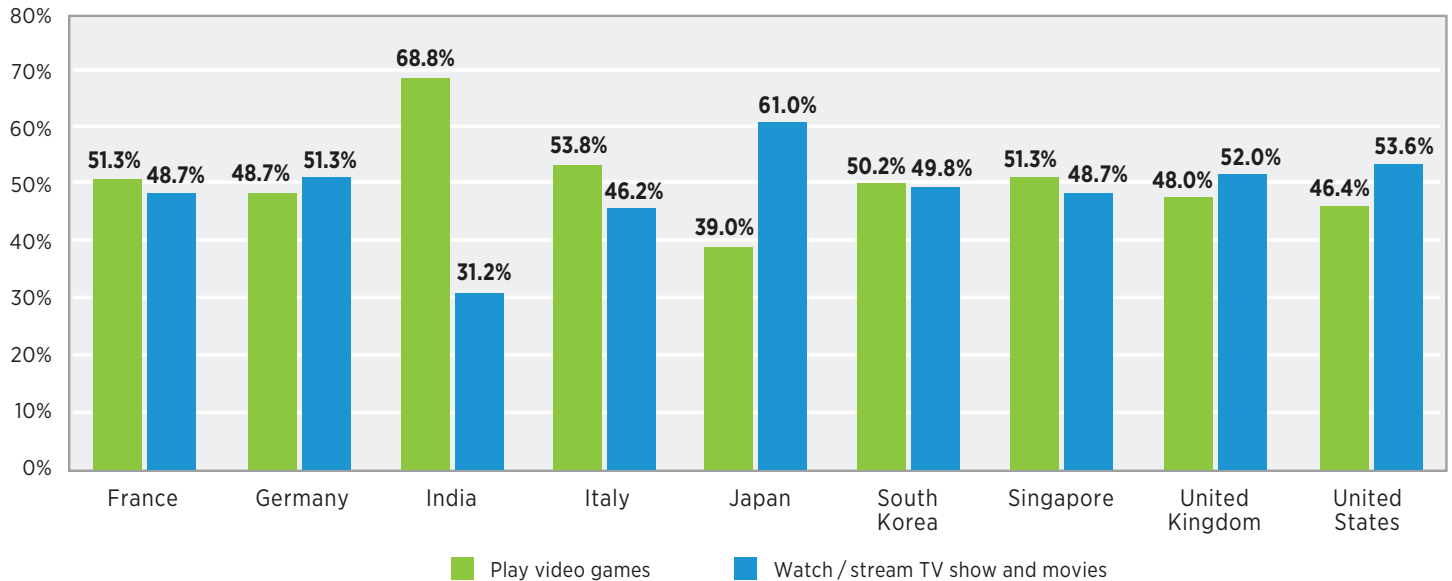
Figure 47: Would you rather play video games or watch TV shows and movies?

While preference globally overall is a toss-up between playing games and watching TV shows or movies, there are clear preferences by age groups, where gamers 18-45 prefer to play video games, and those 46 and older prefer watching movies and TV shows.
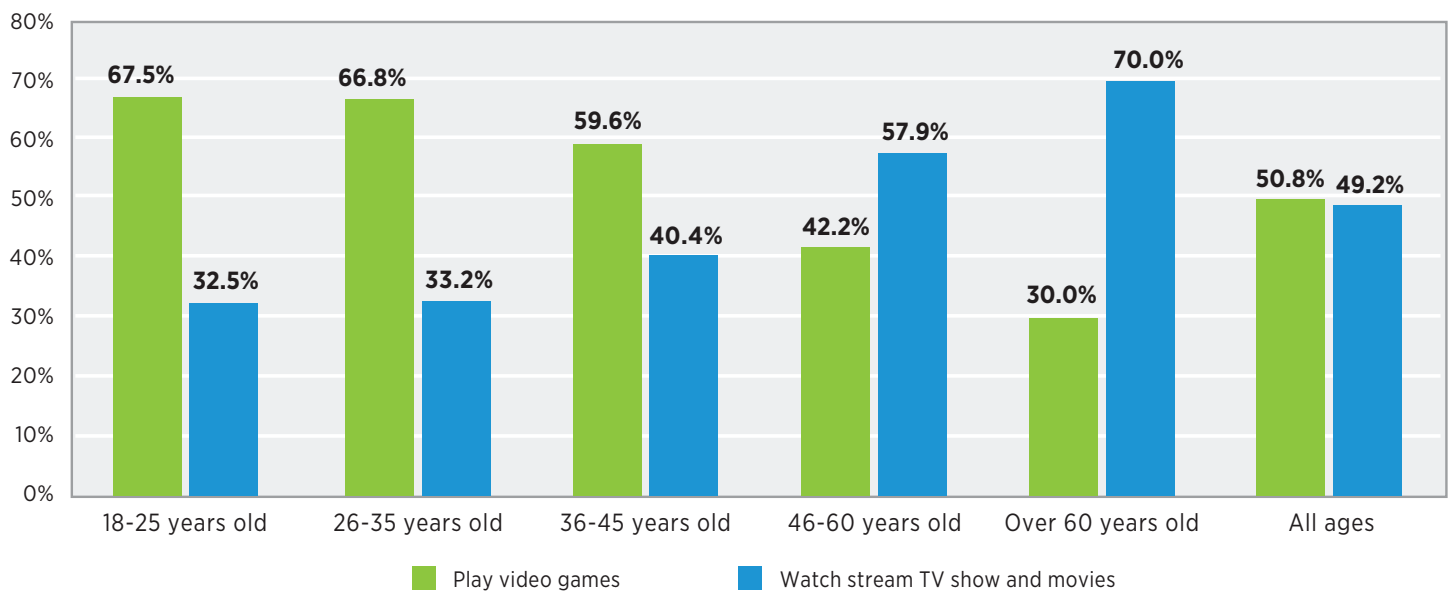
Figure 48: Would you rather play video games or watch TV shows and movies?

Given that males play games more than females, it's not surprising that they prefer game play to watching TV shows and movies.
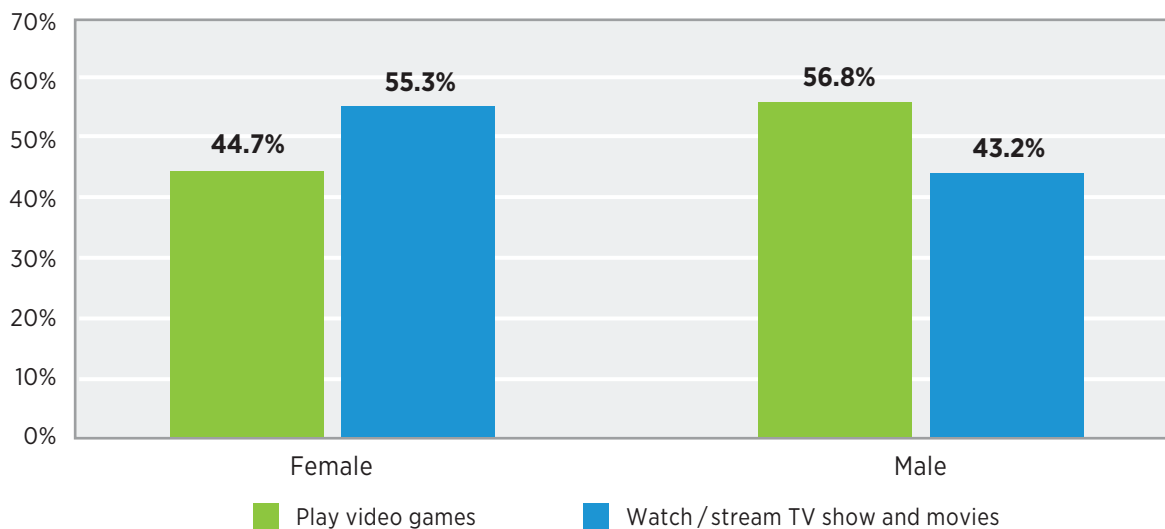
Figure 49: Would you rather play video games or watch TV shows and movies?

Since aspiring professionals and experts play games many more hours per week than casual gamers and novices, they would be expected to prefer game play to watching TV shows and movies.
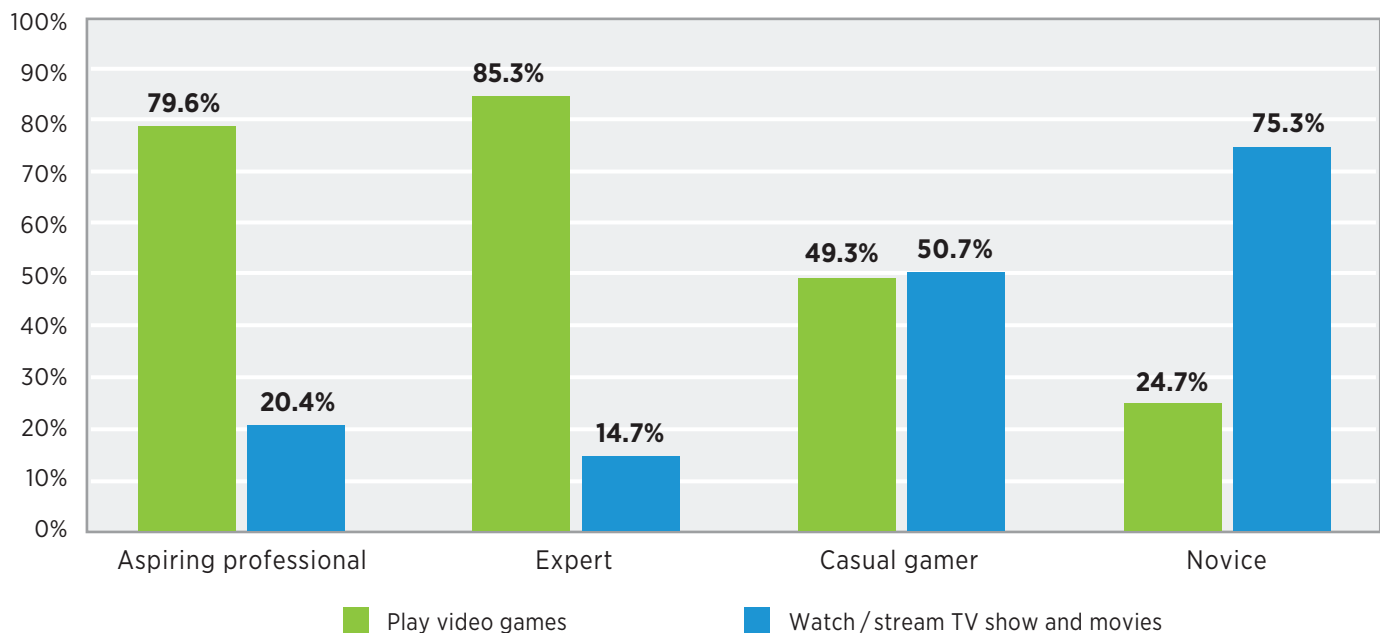
Figure 50: Would you rather play video games or watch TV shows and movies?
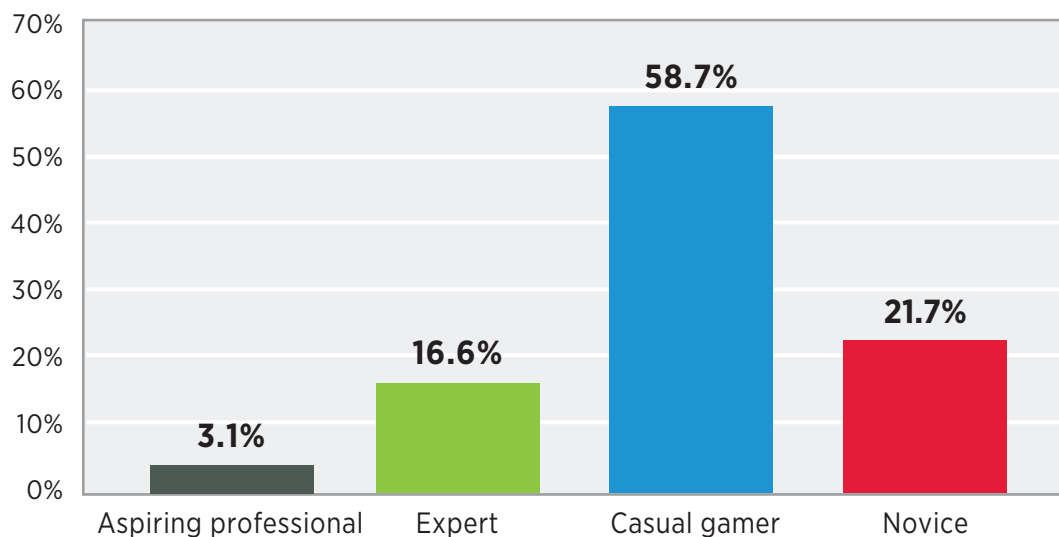
DEMOGRAPHICS
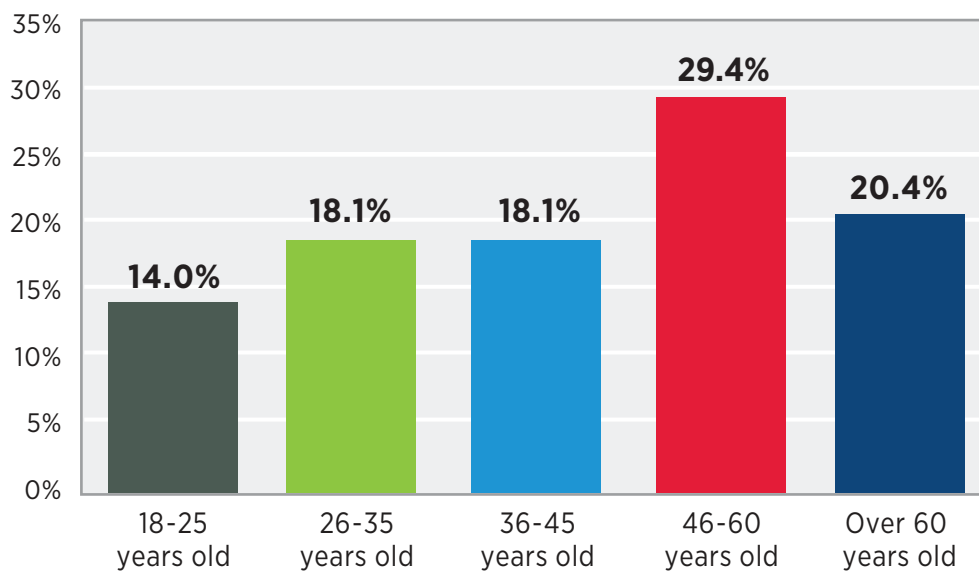

Figure 51: Gamer Type

Figure 52: How old are you?

CONCLUSIONS AND RECOMMENDATIONS

To maximize revenue opportunities, gaming companies should consider the following:

CONSOLE-LESS GAMING SERVICES ARE GAINING TRACTION – MAKE SURE THE GAMES PERFORM

The top concern regarding Console-less Gaming Services among expert and aspiring professional gamers – after subscription pricing – is game performance, specifically latency. Already numerous articles in the press discuss latency issues affecting game play, especially with fast action play. Players notice the difference when comparing performance against downloaded versions of the same game. A high-quality gaming experience is dependent on high quality and high-speed internet connections to be able to handle the interactions between the remote gaming servers and the player. In addition, Edge Compute places game compute near gamers to reduce latency. These edge nodes directly connect to game origin data centers to handle the heavy throughput demands of fast paced games.

OPTIMIZE THE GAME DOWNLOAD PROCESS

Providing gamers with the highest-quality online experiences that keep them playing longer and coming back for more should be the top priority for gaming companies. Nearly 79 percent of gamers find the downloading of video games process frustrating, with slow download speeds as the primary complaint. Other complaints included interruptions during the download process, and when it doesn't work. To ensure all customers receive the fastest download speeds during a major new release or software update, utilize the services of a Content Delivery Network (CDN) with the global capacity and performance to handle spikes in traffic. Utilizing CDN storage that places content such as game files close to your audience will help speed download times. A CDN with a dense caching architecture and direct peering with ISPs and major end-user networks provide the highest performance by ensuring gamers are able to download games from a direct connection to a local point of presence where the software is available. Be sure to position game software in caches prior to release to ensure all gamers get the fastest download performance as soon as the software is available.

METHODOLOGY

This survey was fielded by a third-party company with access to consumer panels in France, Germany, India, Italy, Japan, Singapore, South Korea, the United Kingdom, and the U.S. Approximately 500 responses were collected from each country for a total of 4,500 global responses. Survey responses were collected between January 3 and January 21, 2020.

ABOUT LIMELIGHT NETWORKS

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+1 602.850.5000	+44 203 728 6300	+65 6829 7125