



THE 50-PLUS GAMER OF TODAY AND TOMORROW

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Key Takeaways

Key Takeaways

1

Gaming is increasing its share of attention.

While roughly the same amount of people play games as was seen in 2019, the average amount of time individuals spend playing video games has increased over 40% from 8.5 hours of weekly play to 12 hours.

2

Mobile continues its ascendancy as the primary device for gaming.

*Over 80% use a mobile device to game, with 30% of monthly gamers **only** using a mobile device to play.*

3

The Wordle effect.

The massive growth of Wordle has brought Word games to the forefront of preferences, sitting just behind perennial favorites card/tile and puzzle/logic.

4

“50-plus Gamer” is not a homogenous entity.

5 uniquely motivating gaming segments emerge, from the least passionate Dabblers motivated by wanting something fun to occasionally pass the time, to the heavily passionate Immersives, lifelong gamers.

5

Most gamers perceive some benefit to playing video games.

Seven in ten gamers across all age groups perceive meaningful play- which includes gaming- as an important part of healthy aging.

Key Takeaways

6

Gamers are spending across multiple categories.

The number of 50-plus gamers has grown to 52.4 million since 2019. 50-plus gamers spent on average \$49 on gaming within a six-month timeframe [January- June].

7

Gaming is primarily used as a means of having fun, reducing stress, and passing time.

These motivators are consistent across both today's 50-plus gamers and 40-49 gamers.

8

Cost is the biggest inhibitor to playing more for gamers.

Gated progress behind advertising and microtransactions is also among the biggest pain points for today's 50-plus gamers.

9

50-plus gamers feel like an afterthought of the gaming industry.

Almost 70% feel games are designed with older players as an afterthought.

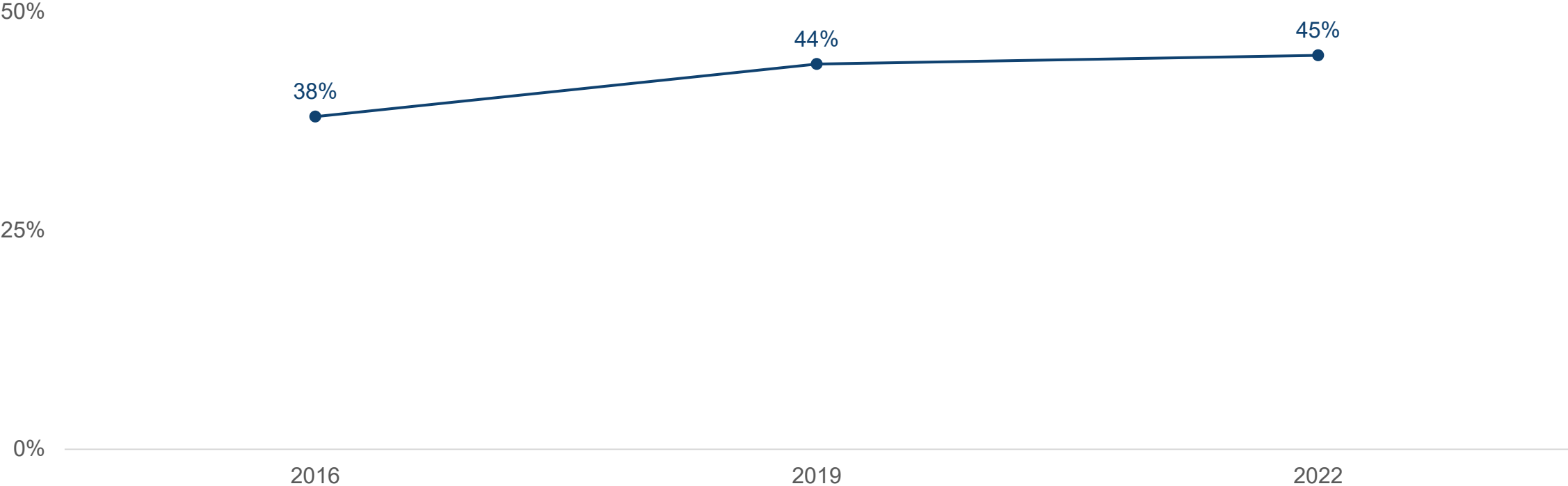


The 50-plus Gamer of Today

The share of the 50-plus playing games is consistent with 2019.

Monthly gaming among 50-plus continues to track above levels seen in 2016.

Percent playing video games at least once a month
Among adults ages 50-plus



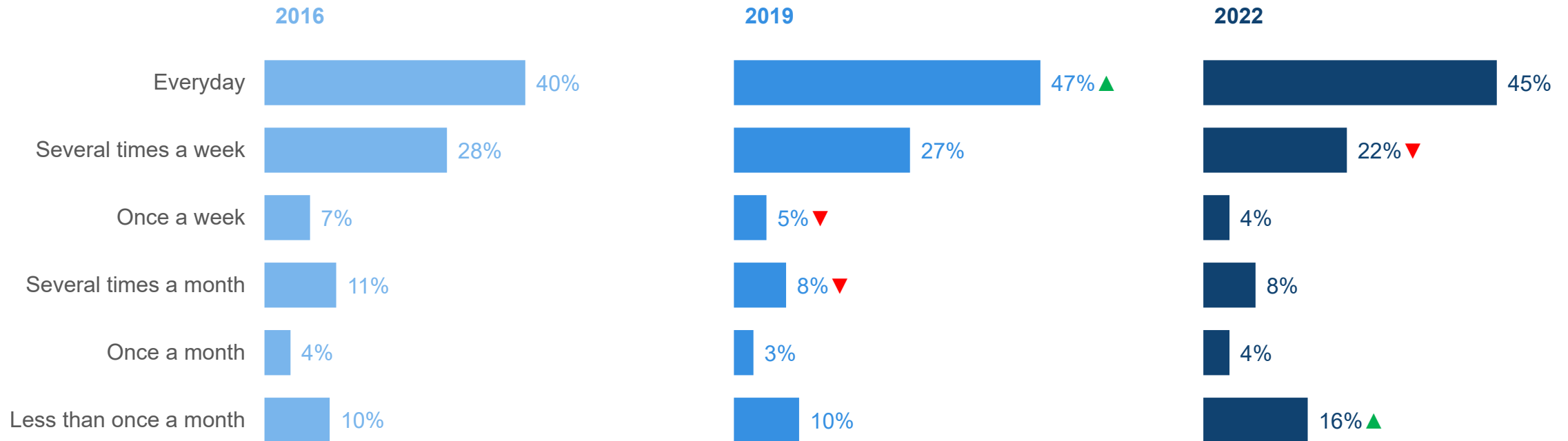
Base: Total Screened (2016: n=3,929; 2019: n=3,775, 2022: unweighted 50-plus n=5,953)

Q7: Generally speaking, how often do you play video games? Video games were defined as an interactive digital entertainment that you “play” via a computer, a game console (like the Xbox or PlayStation) or a phone or tablet. This can include more casual games/gaming apps you play on your phone

Frequency of daily play remains consistent with 2019.

There is a small uptick in the number of 50-plus playing less than once a month.

Frequency of playing video games
Among Gamers ages 50-plus



Base: 50-plus Gamers (2016: n=1,112, 2019: n=1,664, 2022: n=3,170 50-plus gamers of any frequency)

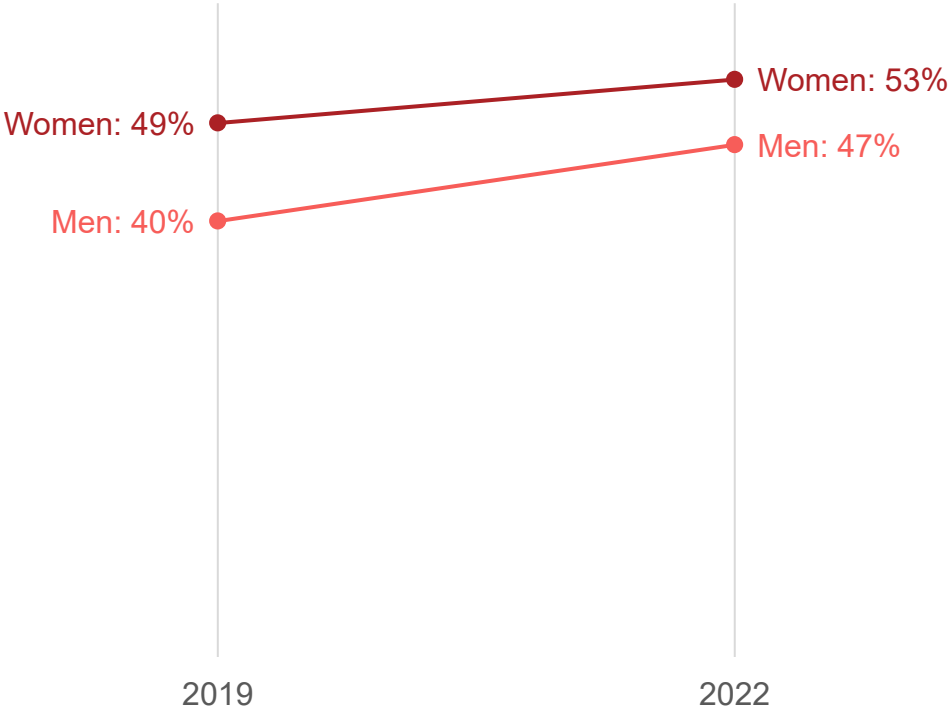
Q7: Generally speaking, how often do you play video games?

▲ ▼ Indicates a significant difference vs. previous time period at 95 confidence level

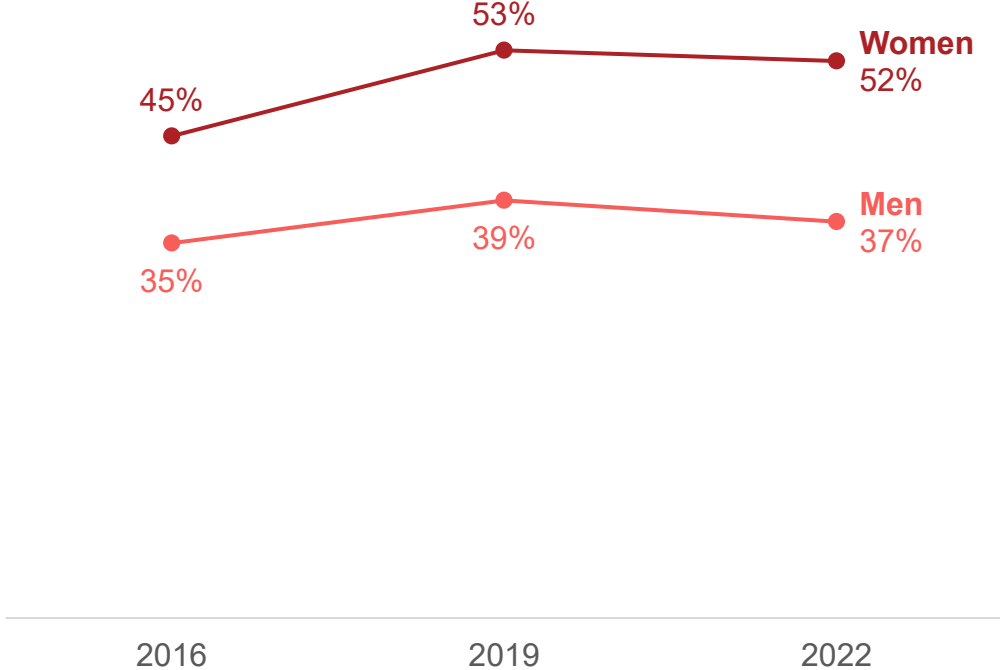
Women 50-plus continue to be more frequent Gamers.

Incidence and frequency of daily play shows no change since 2019 among Men and Women.

Percent playing video games at least once a month
Among adults ages 50-plus, by gender



Percent who play every day
Among Gamers ages 50-plus, by gender



Base: Total Screened – 2019 (n=3,775; n=1,899 Men, n=1,876 Women), 2022 (n=5,953 unweighted 50-plus, n=2,797 Men, n=3,155 Women)

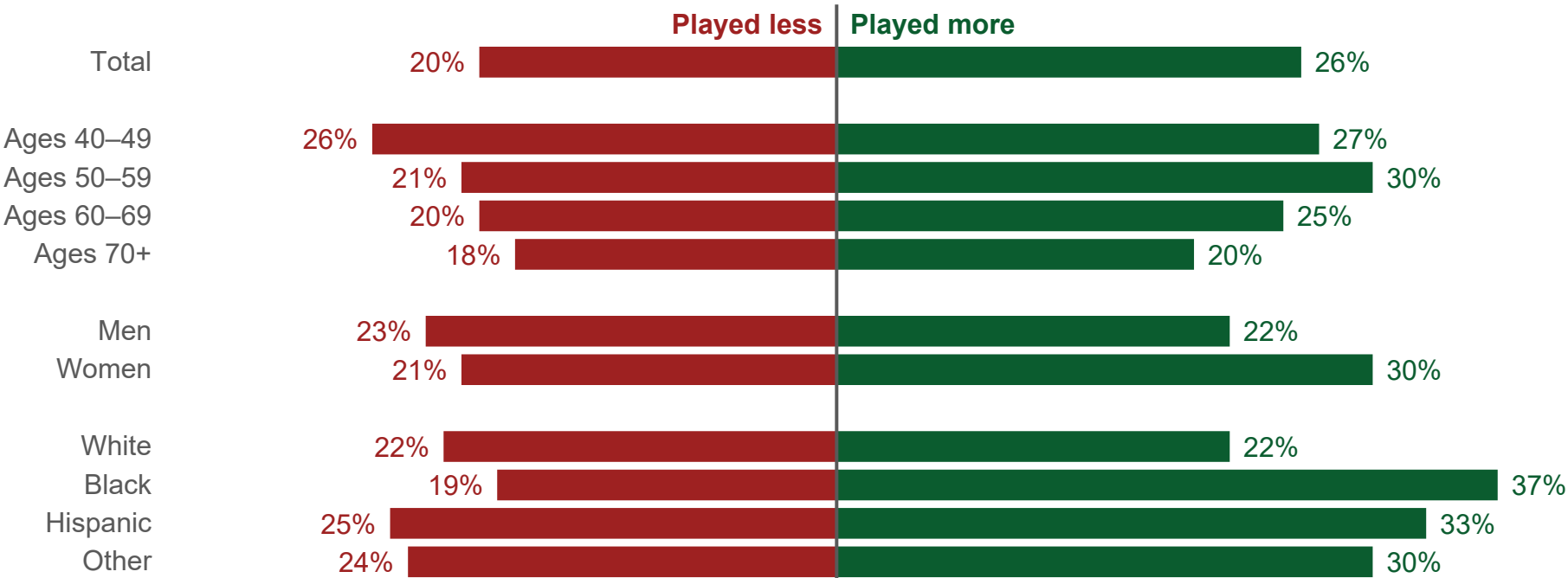
Base: Gamers – 2016 (n=1,112), 2019 (n=1,664), 2022 (n=3,170 50-plus gamers of any frequency)

Q7: Generally speaking, how often do you play video games?

Women, Blacks, and the 50-59 increased play most since COVID.

Play frequency remained consistent for 50-plus Men, Whites, and those ages 40-49 or 70-plus.

Change in gaming behavior since COVID
Among Gamers ages 50-plus, and by demographic characteristics



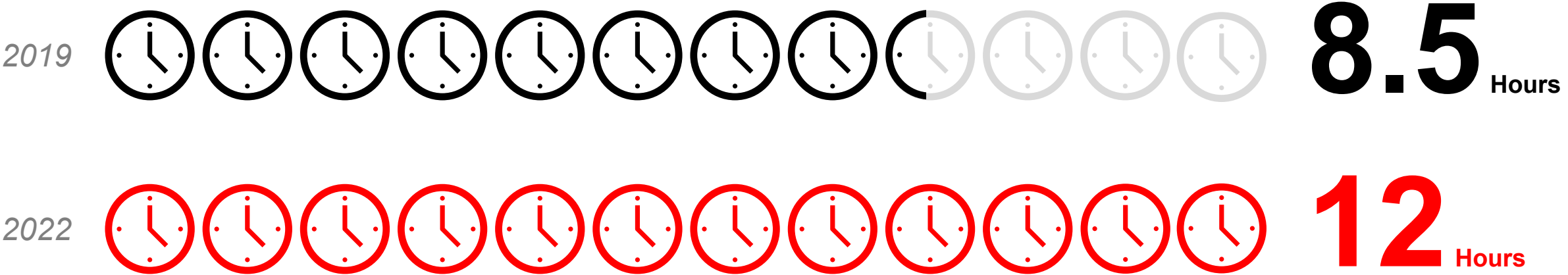
Base: Monthly Gamers – Total: 50-plus gamers of any frequency (n=3,170), 40-49 (n=1,428), 50-59 (1,264), 60-69 (1,089), 70+ (n=817) Male (n=2,195), Female (n=), White (n=3,080), Black (n=474), Hispanic (n=586), Other (n=458)

Q19: Compared to March 2020, approximately 2 years ago, would you say you currently play video games more than, less than, or about the same amount as at the height of the COVID-19 pandemic?

Covid play impact is in overall hours, rather than daily play.

Average hours played across devices increased over 40% since 2019.

Average hours played across all devices in the past 6 months
(Among Gamers Ages 50-plus)

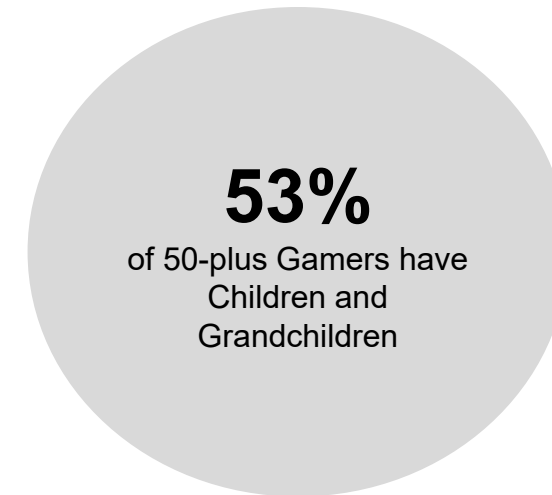
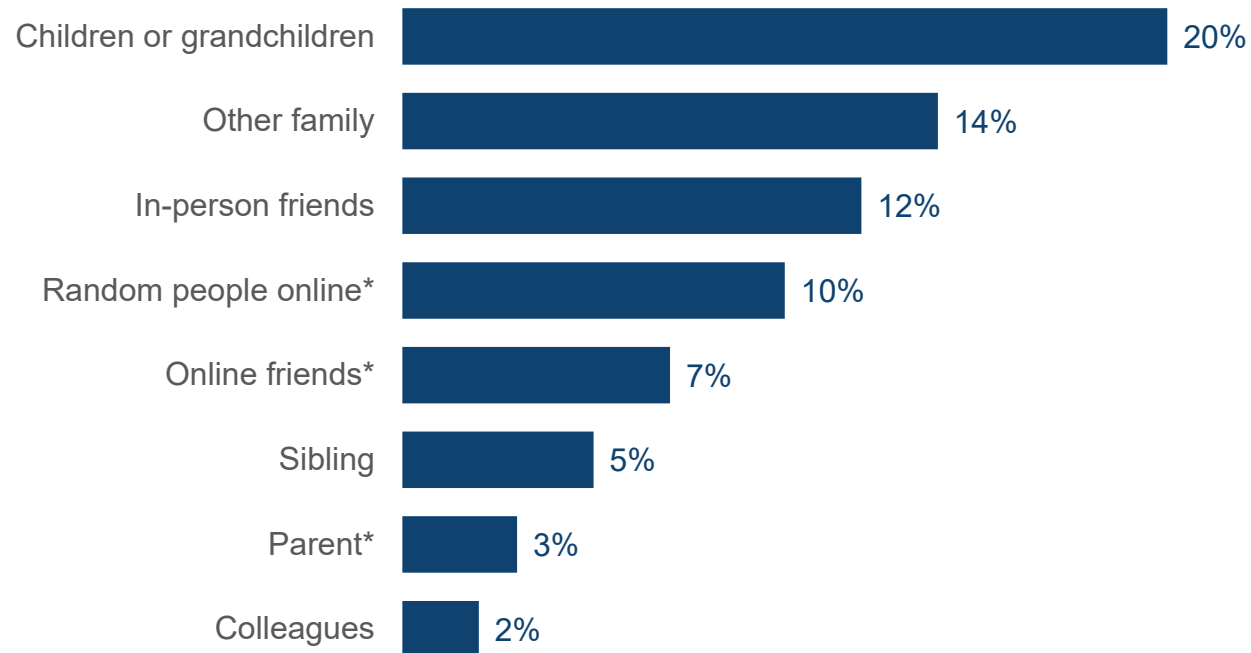


Base: 50-plus Gamers – 2019 (n=1,664), 2022 (n=3,170 50-plus gamers of any frequency)
Q9. Thinking about the past 6 months... how many hours per week would you say you personally spend gaming...?

Children are the most common play companions for 50-plus gamers.

Among those who play with others, children are the top gaming partner.

Percent who play video games with the following
Among Gamers ages 50-plus



Base: 50-plus Monthly Gamers -2022 (n=2,657)

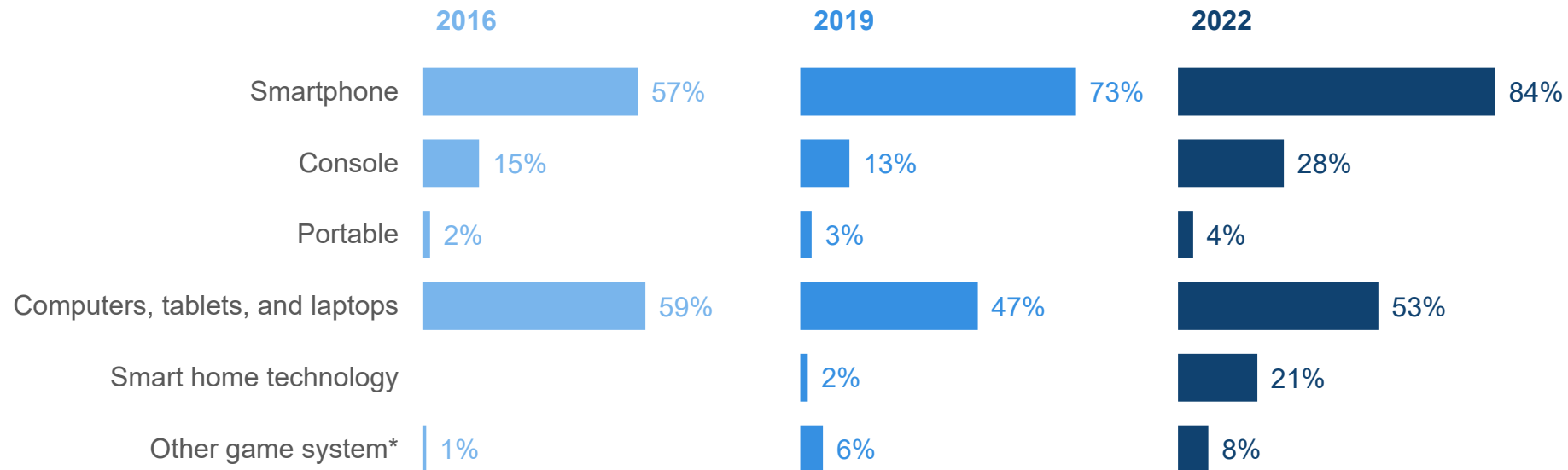
Q22: Who do you typically play video games with when playing on the following devices (either virtually or in person)? Q74. Do you have any of the following?

*New answer options were added to this question in 2022.

The dominance of mobile continues among 50-plus Gamers.

Console usage has increased substantially, partly owing to the growth of the Nintendo Switch and longevity of Gen 8 consoles (replaced with Gen 9 in early 2021), as did non-device gaming through devices such as smart speakers and smart TV's.

Percent of Gamers who use the following devices for gaming
Among Gamers ages 50-plus



30%
only play on mobile

Base: 50-plus Monthly Gamers – 2016 (n=1,112), 2019 (n=1,664), 2022 (n=2,657)

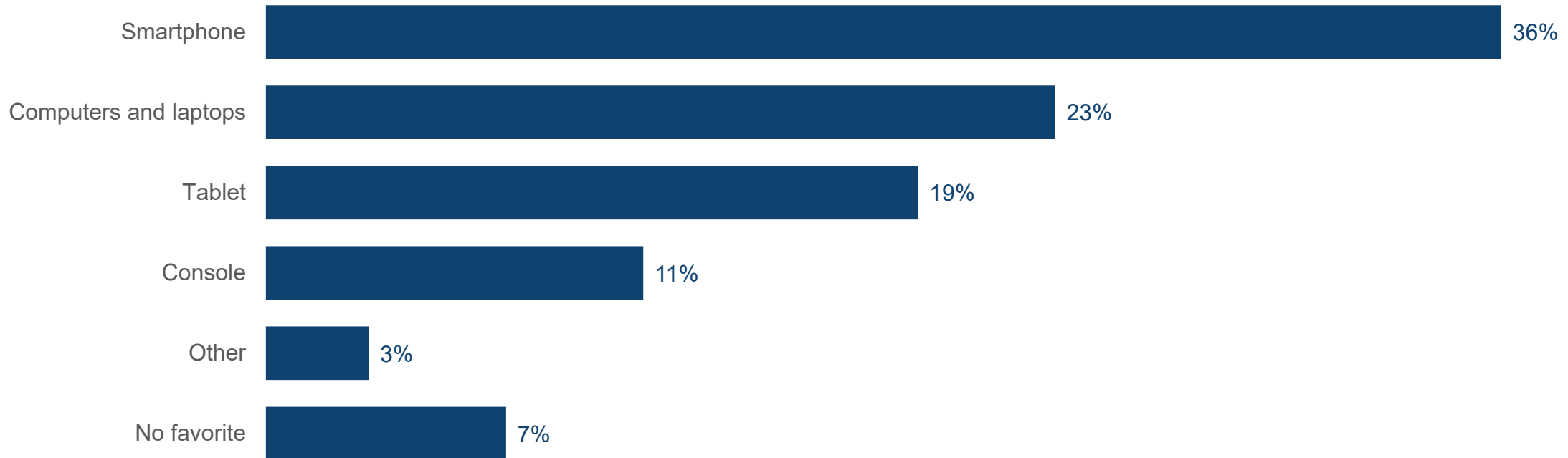
Q8: Which of these systems or devices do you personally use for playing video games on at least once per month?

*Other game system includes Virtual Reality headsets, Plus and Play/all-in-one systems, and other systems not listed. Smart Home technology includes Smart TV, Digital Media Players and Home Assistants

Mobile is the preferred device for gaming.

Mobile devices (smartphones and tablets) accounts for over half of 50-plus gamers favorite device for gaming, while consoles are an emerging presence.

Favorite devices for gaming
Among gamers ages 50-plus



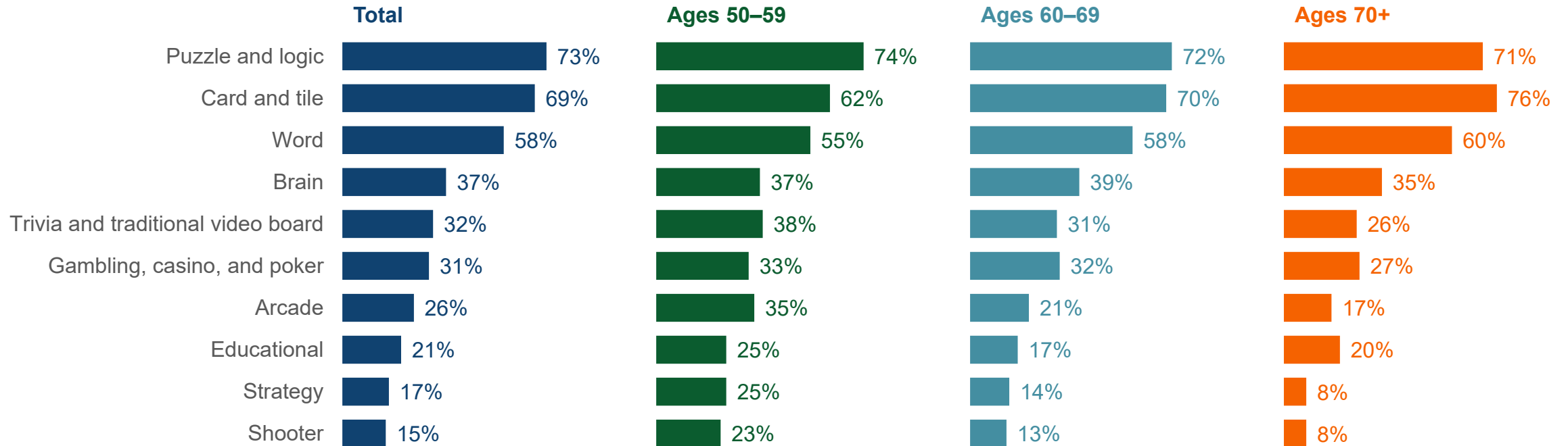
Base: 50-plus Monthly Gamers (n=2,657)

Q10: Which of the following is your favorite device to play video games on?

The top 3 most played genres are clear favorites.

Top preferred genres still reflect a traditionally mobile and/or casual PC mode of play.

Percent who play the following game genres
Among Gamers ages 50-plus, and by age range

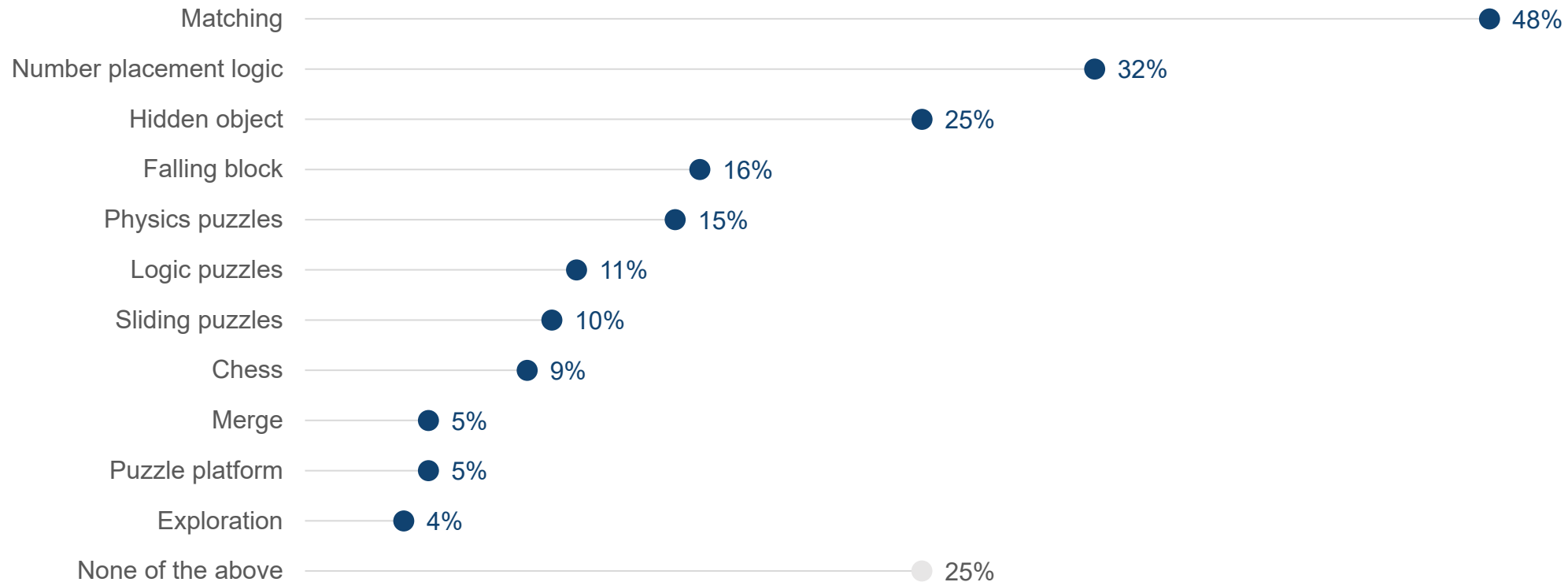


Base: 50-plus Monthly Gamers (n=2,657), 50-59 (n=1,059), 60-69 (n=896), 70+ (n=703)

Q12: Please select the types of games from the list below that you typically like to play...

Matching and number placement games are the top puzzle and logic game formats.

Percent who play the following types of puzzle or logic games
Among Gamers ages 50-plus



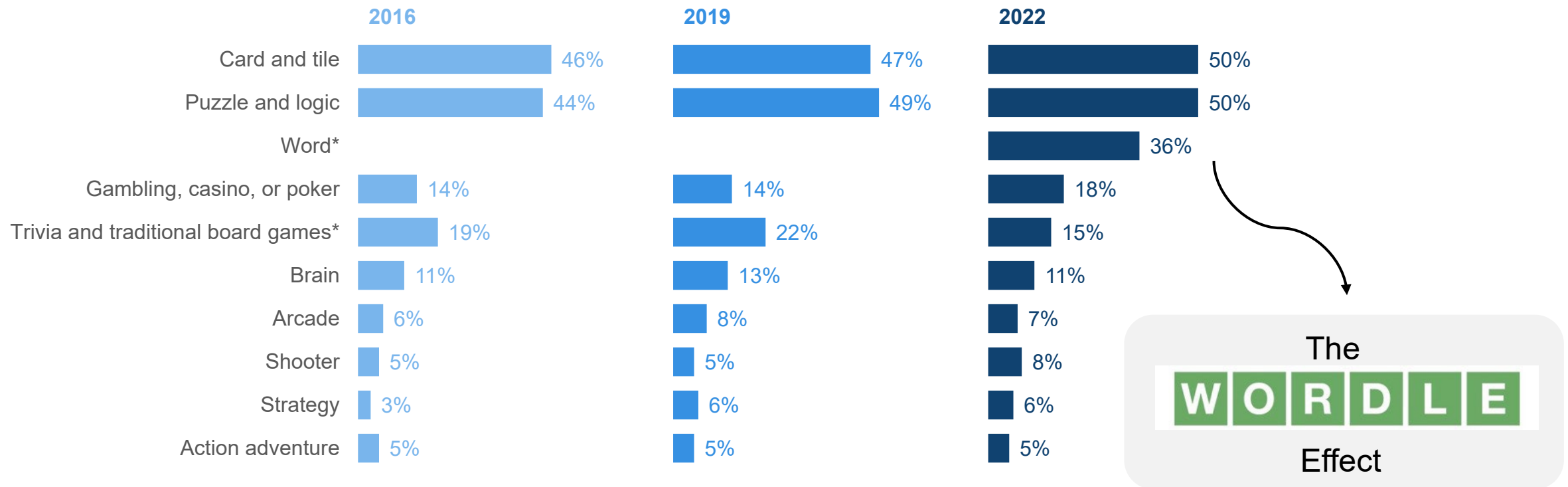
Base: 50-plus Monthly Gamers (n=2,657)

Q14. Which, if any, of the following types of puzzle/logic video games do you typically like to play on any device?

Wordle has propelled the enjoyment of word-based games.

Card & tile and puzzle & logic still remain firm 50-plus genre favorites.

Percent who say the following gaming genres are in their three favorite types of games
Among Gamers ages 50-plus



Base: 50-plus Monthly Gamers – 2016 (n=1,112), 2019 (n=1,664), 2022 (n=2,640)

Q13: Please select your three favorite types of games...

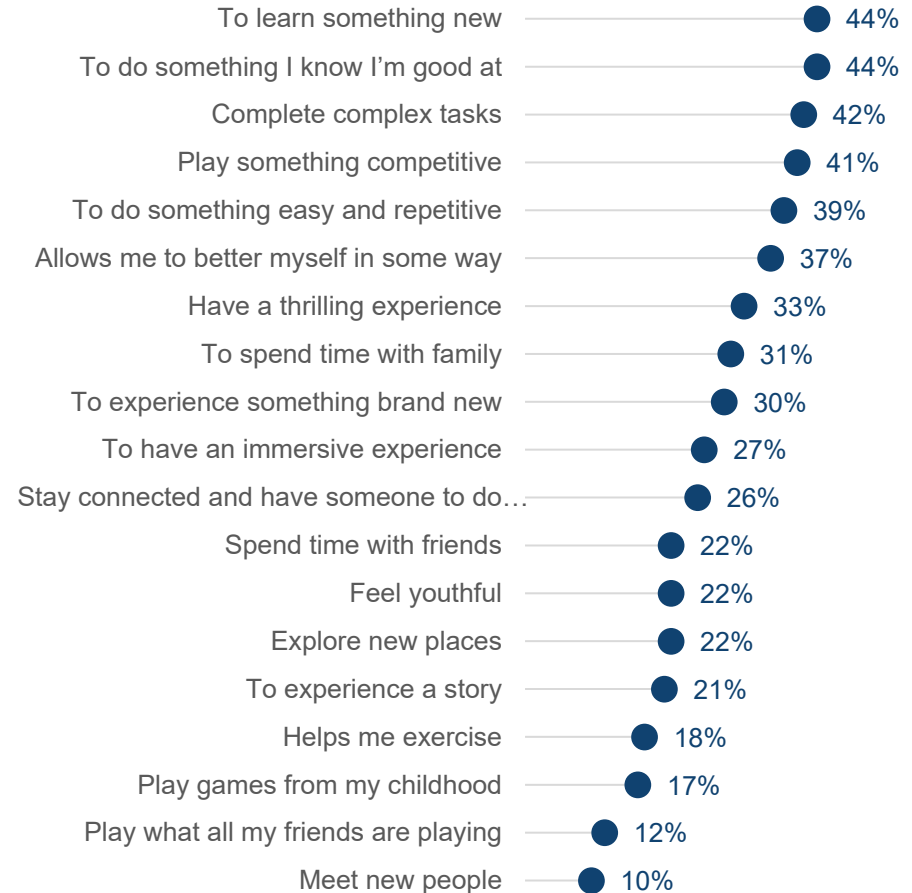
*Trivia and traditional was split from word games in 2022 given the expected growth of Wordle.

Having fun is the top reason for gaming.

Percent who say the following reasons are important for playing video games
Among Gamers ages 50-plus



Percent who say the following reasons are important for playing video games
Among Gamers ages 50-plus



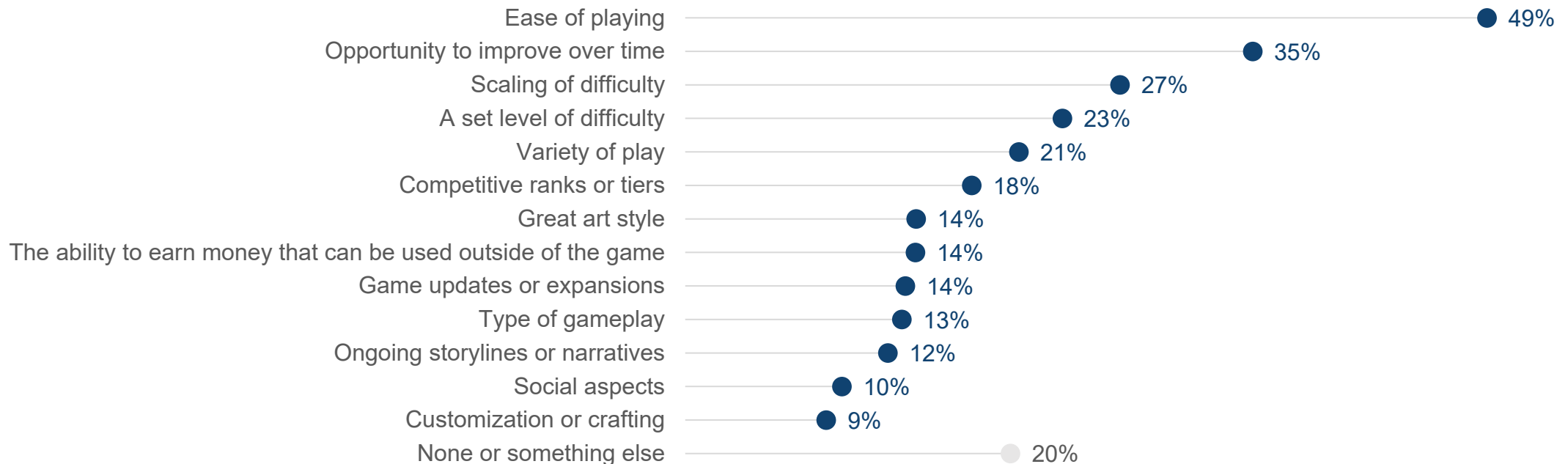
Base: 50-plus Monthly Gamers (n=2,657)

Q42: In general, how important are the following reasons for playing video games?

Gamers want to play games that are easy to start but slightly challenging and allow room for improvement.

Most older Gamers want gaming features that allow them to be challenged in skill level or competition.

Percent who rate the following video game features as extremely/very important
Among Gamers ages 50-plus



Base: 50-plus Monthly Gamers (n=2,657)

Q44. Which of the following features are most important for video games to have for you to want to play them?

More gamers are spending on gaming.

While more gamers have spent something on gaming overall, 6-month spending is slightly down compared to 2019. Mobile app purchases are outweighed by spending on accessories, consoles, and digital game purchases.

Percent who spent on gaming and average amount spent on gaming
Among Gamers ages 50-plus

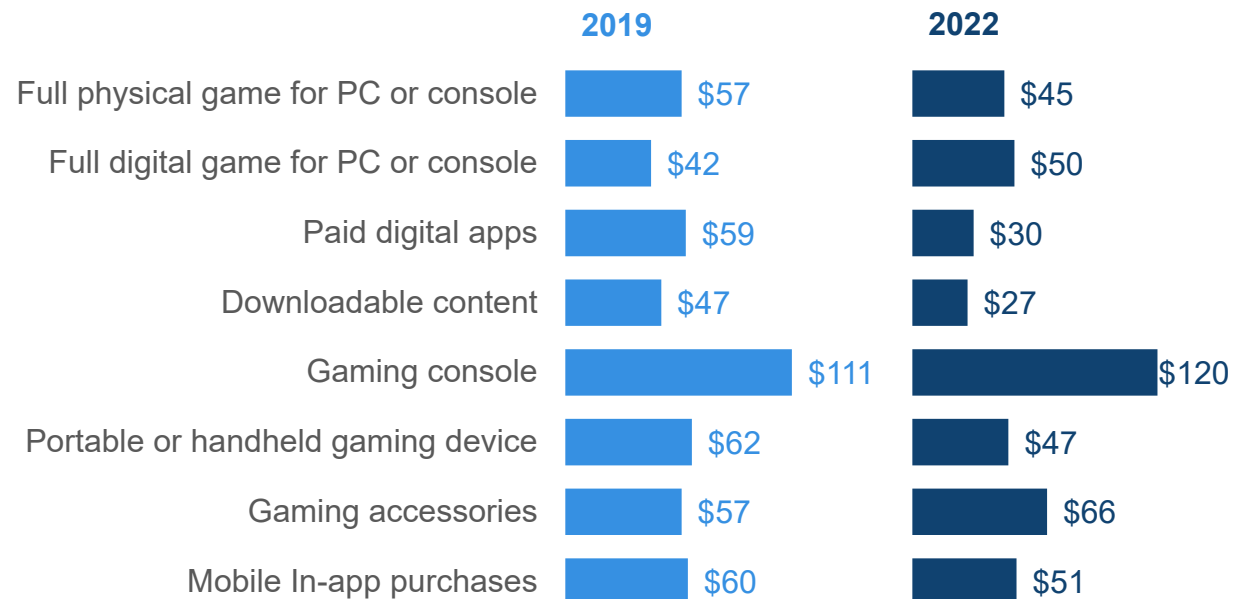
Percent who spent on gaming



Average amount spent on gaming



Average amount spent by category
Among Gamers 50-plus who are buyers of items in each category

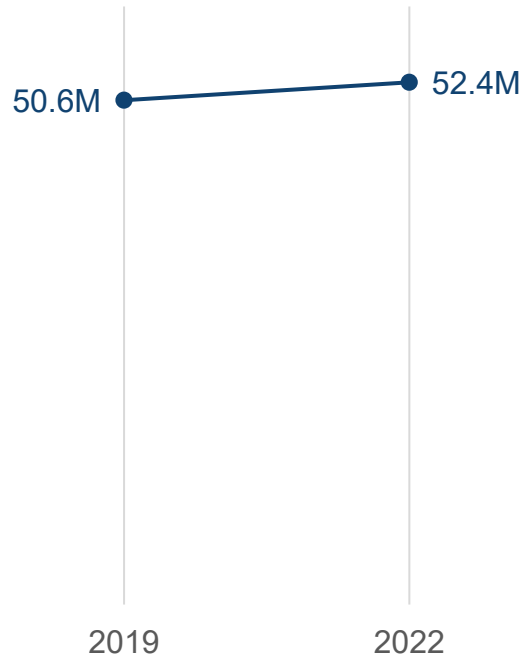


Base: 50-plus Monthly Gamers – 2019 (n=1,664), 2022 (n=2,657)

Q31: For the video-game related purchases you have made in the past 6 months, how much have you spent for these items? We know it may be difficult to remember, but please do your best to estimate your spending. *New answer options were added to this question in 2022.

Continued growth in the number of older gamers could lead to an opportunity for massive spending power on gaming.

Number of 50-plus Gamers

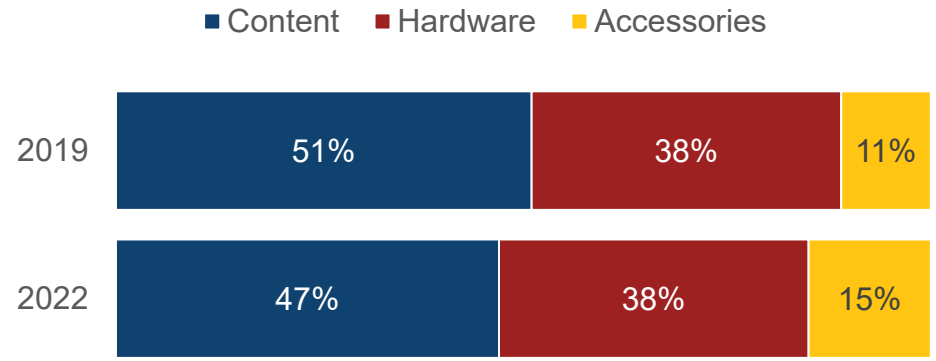


Average six-month gaming spend [January-June]

\$49

\$2.5B

Breakdown of gaming spend Among Gamers ages 50-plus




Projected Spend Calculation

52.4M x \$49 biannual spend

Source: US Census and AARP. Population estimates calculated by AARP.

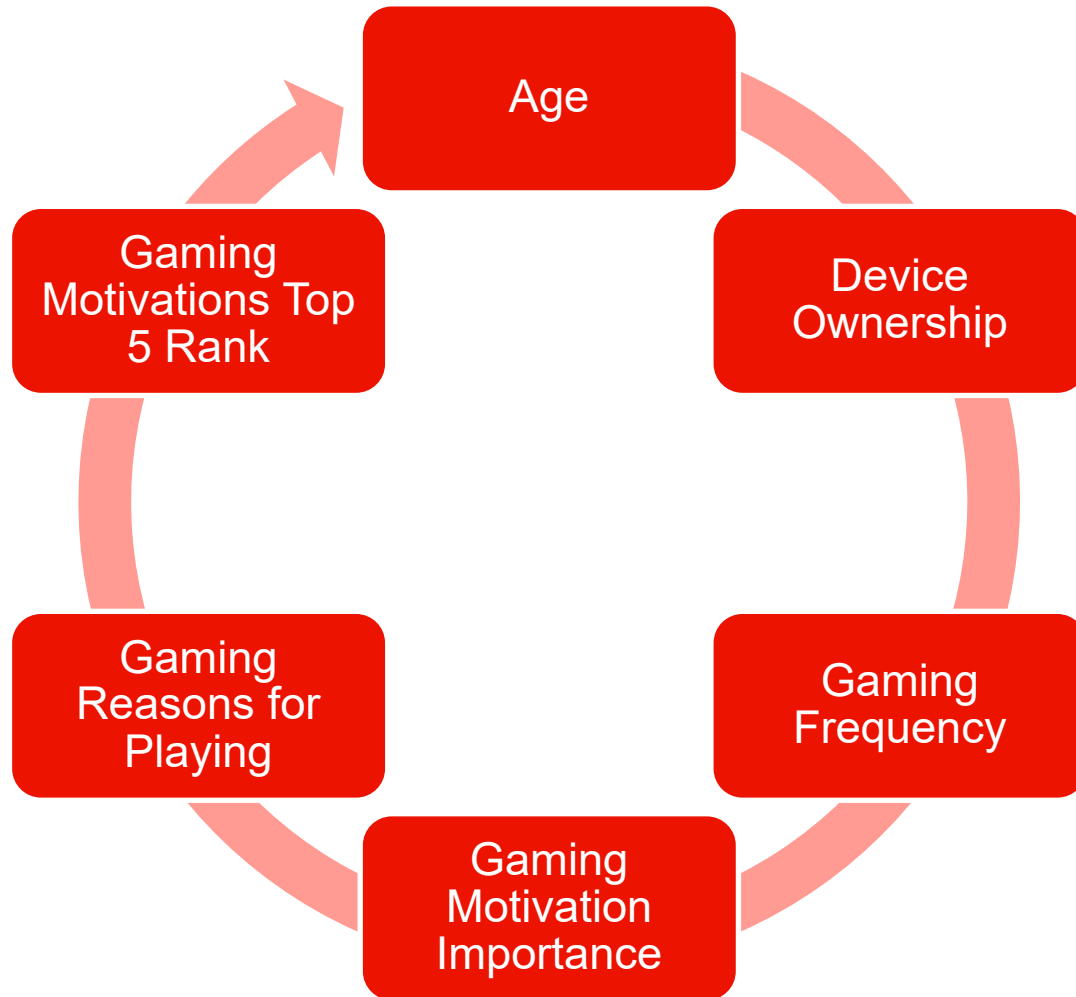
*Content includes the digital or physical game as well as in-app purchases, virtual items, features, or customizations for video game avatars, bases, and characters. Accessories includes physical gaming items such as headsets, controllers, microphones, etc. Hardware includes gaming consoles or handheld devices.

Base: 50-plus Monthly Gamers – 2019 (n=1,664), 2022 (n=3,168)
Q31: For the video-game related purchases you have made in the past 6 months, how much have you spent for these items?

A photograph showing three older adults sitting on a couch and playing video games. In the foreground, a woman with short brown hair, wearing a yellow t-shirt and a necklace, is smiling and looking towards the right. Behind her, a man with a balding head and a goatee, wearing a blue and red plaid shirt, is laughing and holding a game controller. To his right, another man with white hair, wearing a blue button-down shirt, is also smiling and holding a game controller. The background is slightly blurred, showing other people in a social setting.

The Segmented 50-plus Gamer

The 50-plus Gamer Segments



The 50-plus Gamer was **segmented**, or divided into smaller, more specific groups based on certain characteristics or traits they share.

Segmenting the 50-plus Gamer into meaningful, actionable cohorts is a useful technique to better understand shared and unique characteristics.

Six key characteristics were identified as relevant.*

**Refer to the methodology report for more information about segmentation and the technique used.*

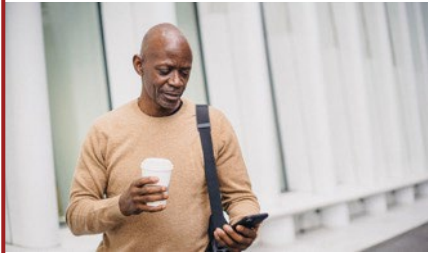
The 50-plus Gamer Segments

← Less passionate

More Passionate →

Dabblers

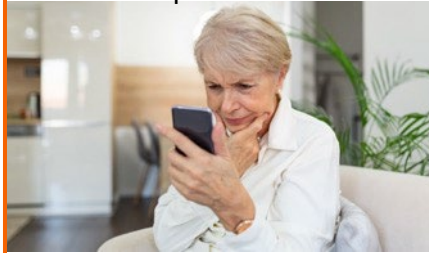
15%
of 50-plus Gamers



Gaming is not an integral aspect of the Dabblers' life; they play infrequently to **pass the time** and **relieve boredom**. Gaming is not perceived as hugely beneficial to them as they age, and they have **no desire to game more than they already do**. When playing, they're doing it mostly alone, playing **card, tile, and puzzle games** on their PCs or phones.

Mainstreamers

35%
of 50-plus Gamers

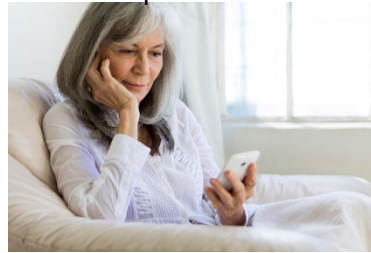


The Mainstreamers are the everyday gamers; they play somewhat frequently, but **don't feel passionately about playing games**.

With the greatest concentration of mobile-only players, these more casual players use gaming for **enjoyment and mental stimulation**. Word games such as Wordle are very popular with this group.

Indulgers

23%
of 50-plus Gamers

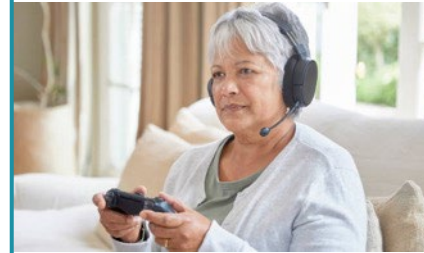


Indulgers have the strongest daily play habit, but don't play the most hours overall. Despite this, they feel they **play too much**, leading to guilt about how **beneficial it is to them as they get older**.

These mobile/tablet gamers incorporate casino games into their repertoire of puzzle/card/tiles with gaming helping to **reduce stress**.

Enthusiasts

19%
of 50-plus Gamers



Enthusiasts are passionate gamers, but **don't let gaming absorb them**, despite a strong appetite to play more. Gaming fills the evening entertainment void, where they **engross themselves** in a more expanded range of genres such as Action Adventure and RPG. Enthusiasts are narrative-seekers looking for a **strong story and compelling gameplay**.

Immersives

7%
of 50-plus Gamers



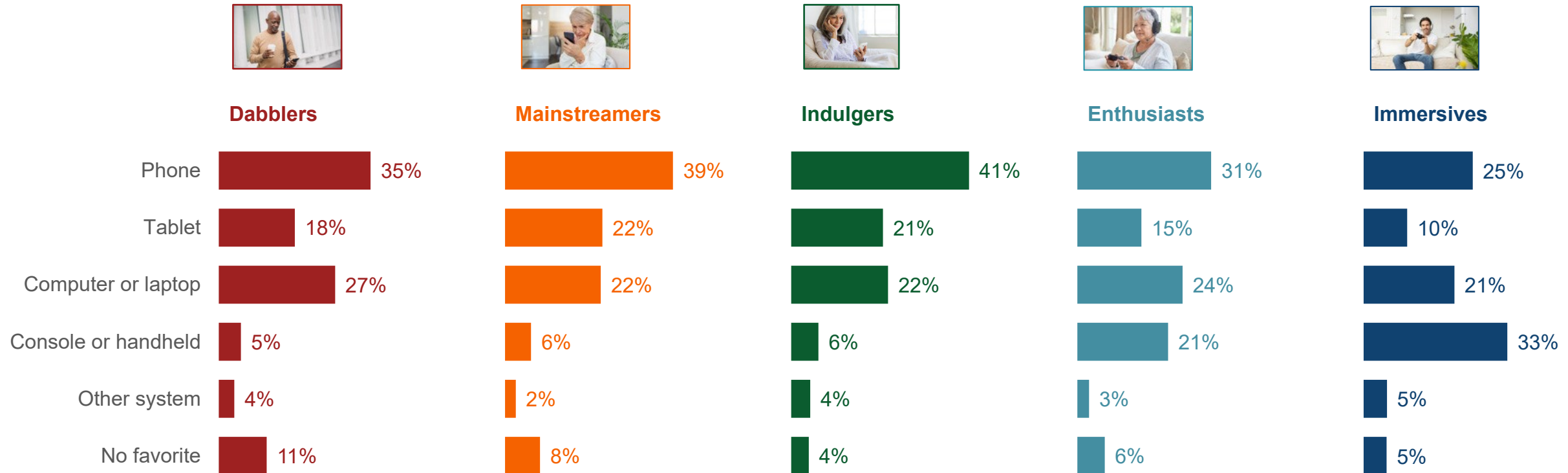
The **leading-edge core**, Immersives are on the forefront of new gaming trends - gaming is a **fundamental part of their identity and lifestyle**. These console/PC gamers are **lifelong players** with the heaviest overall weekly hours recorded. **Social connection is more integral** to their choices, playing genres like fantasy/make-believe more often.

Immersives are the only segment where phones are not the #1 preferred gaming device.

Consoles have deeper play integration for Enthusiasts and Immersives.

Percent who say the following devices are their favorite video gaming device

By 50-plus Gamer segment



Base: Dabblers (n=403), Mainstream (n=934), Indulgents (n=612), Enthusiasts (n=511), Immersives (n=197)

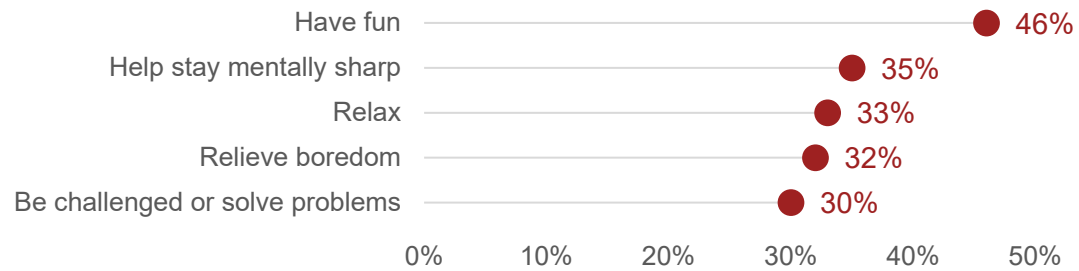
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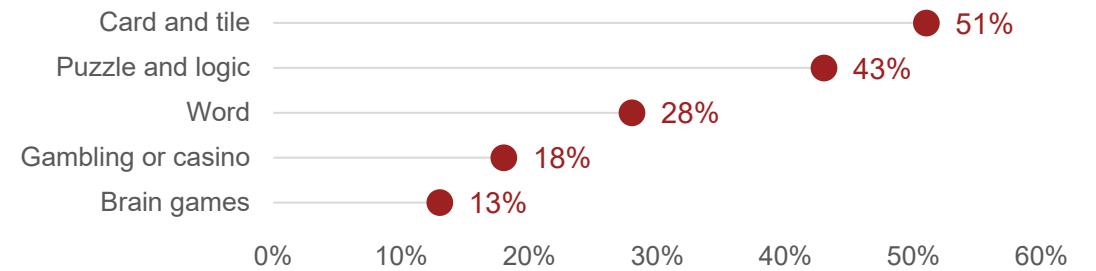
Dabblers (15% of 50-plus Gamers)

Dabblers are motivated to game in order to pass the time.

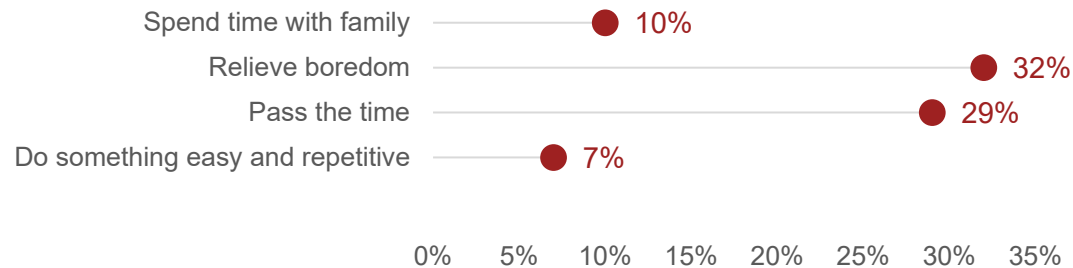
Top 5 motivations to play



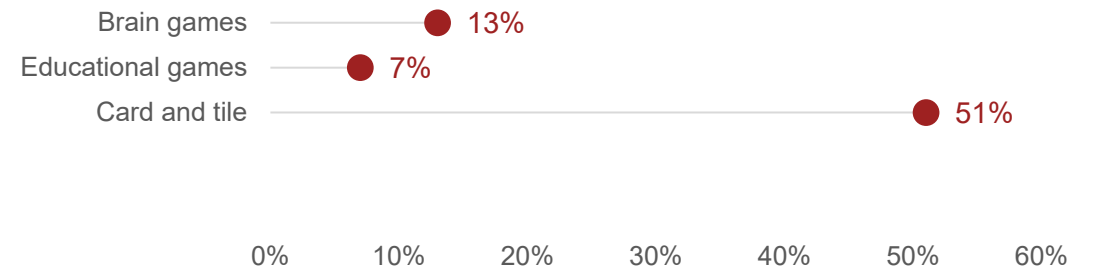
Top 5 genres to play



Top 5 unique motivations to play*



Top 3 unique genres to play*



Base: Dabblers (n=403)

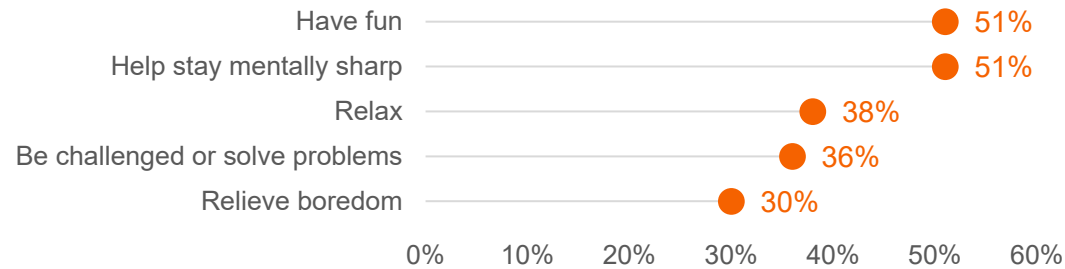
Q43: Which of the following reasons are the most important to your enjoyment of video games? Q13: Please select your three favorite types of games from the list below that you typically like to play. Data shows any motivation selected 1 through 5. *Unique refers to sorted high to low by strength of over-indexing. See methodology for full definition.



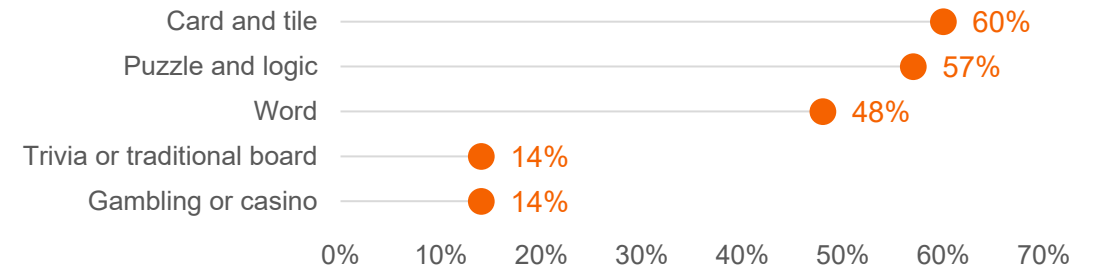
Mainstreamers (35% of 50-plus Gamers)

Mainstreamers are the largest segment of the 50-plus Gamer. They prioritize mental acuity and love games that allow them to solve problems.

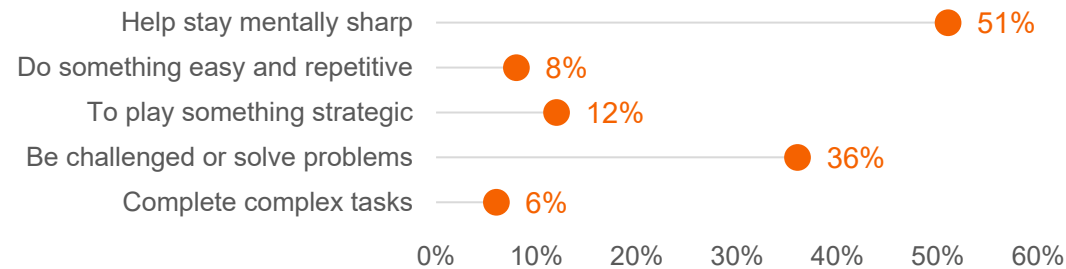
Top 5 motivations to play



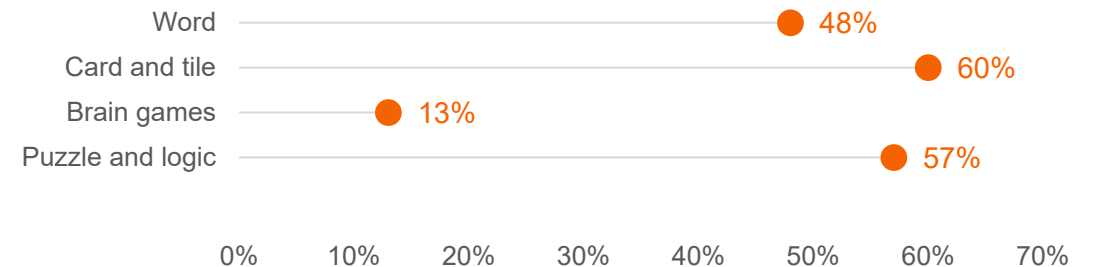
Top 5 genres to play



Top 5 unique motivations to play*



Top 4 unique genres to play*



Base: Mainstreamer (n=934)

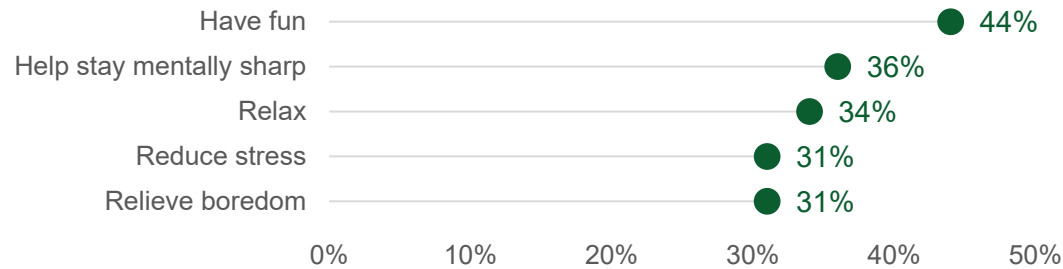
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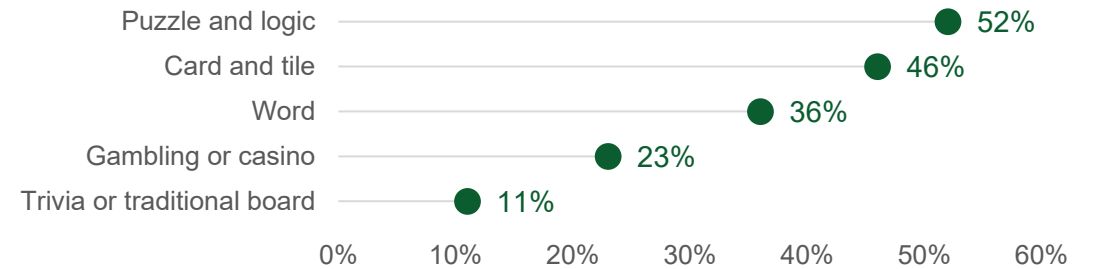
Indulgers (23% of 50-plus Gamers)

Indulgers may feel a little guilty about gaming, but they love the fun experience of gaming-especially from gambling and casino games.

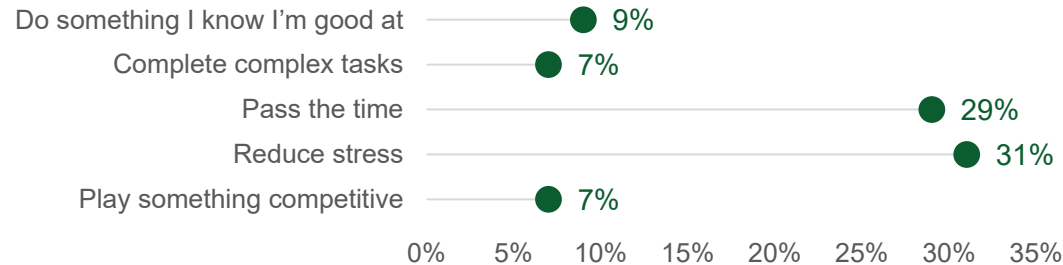
Top 5 motivations to play



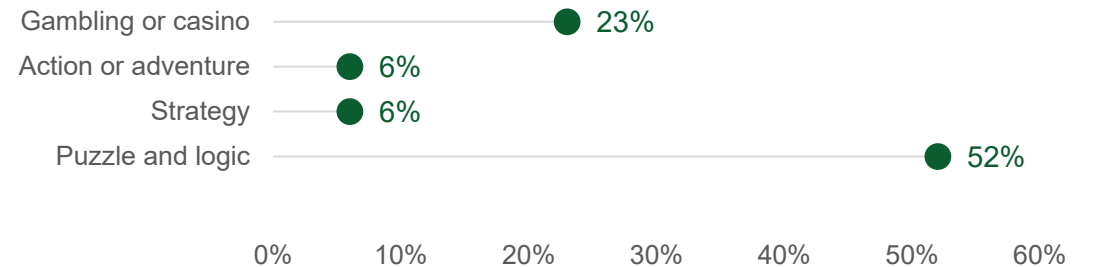
Top 5 genres to play



Top 5 unique motivations to play*



Top 5 unique genres to play*



Base: Indulgers (n=612)

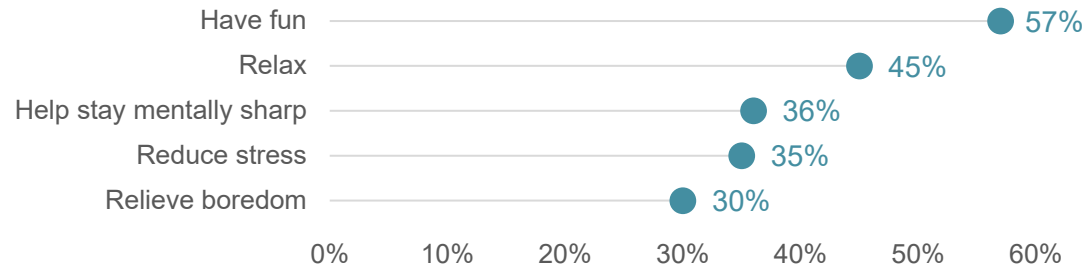
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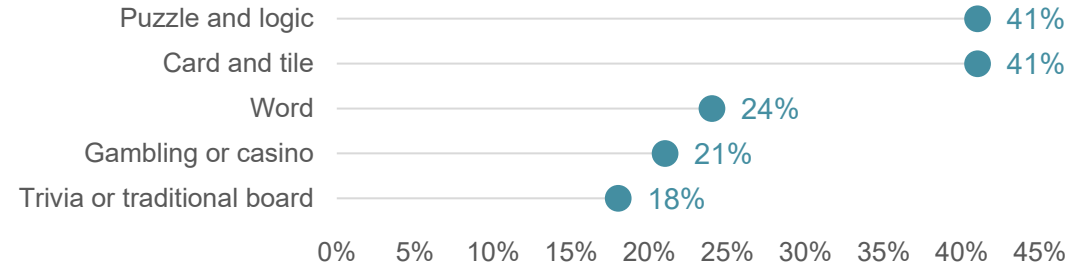
Enthusiasts (19% of 50-plus Gamers)

Enthusiasts are active gamers and love the energy and enjoyment they get from gaming.

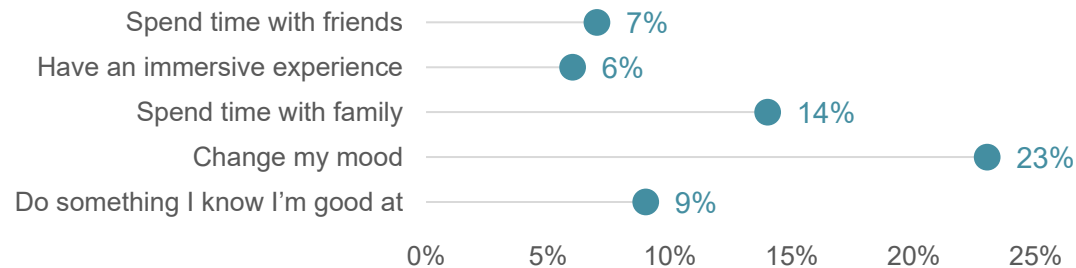
Top 5 motivations to play



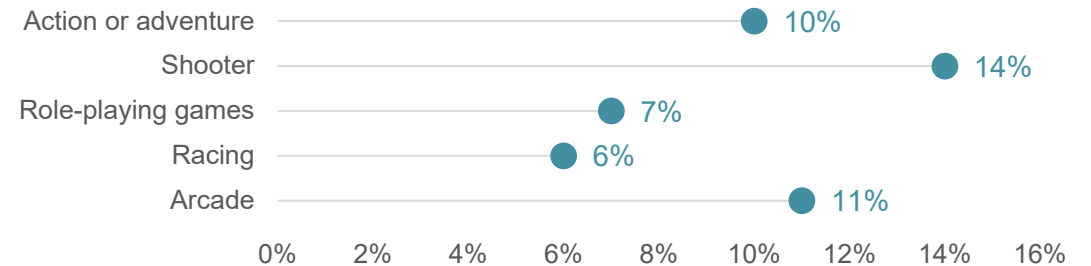
Top 5 genres to play



Top 5 unique motivations to play*



Top 5 unique genres to play*



Base: Enthusiasts (n=511)

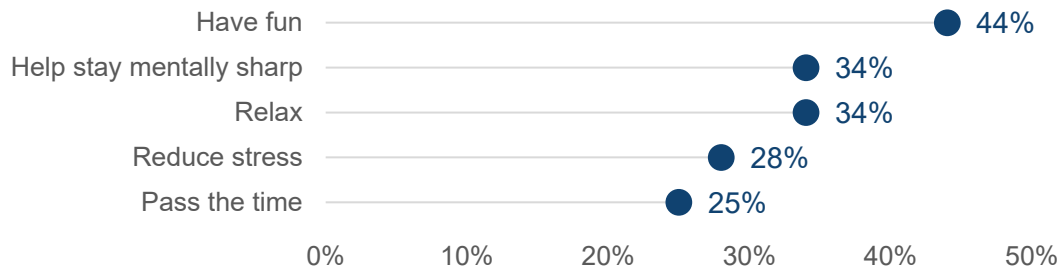
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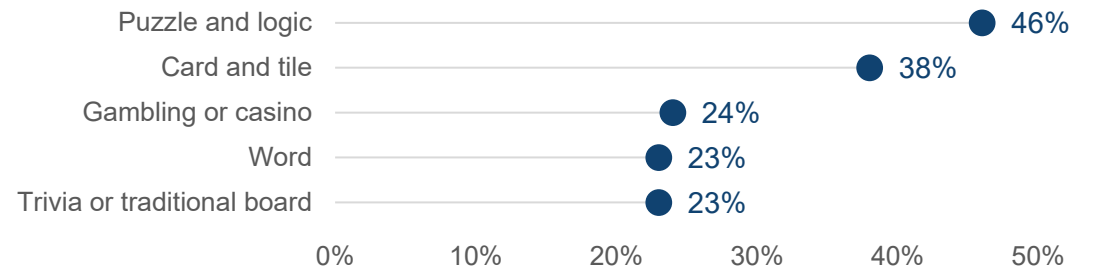
Immersives (7% of 50-plus Gamers)

Immersives are the most passionate about gaming and feel gaming is a part of their identity. They enjoy social and experience-driven genres.

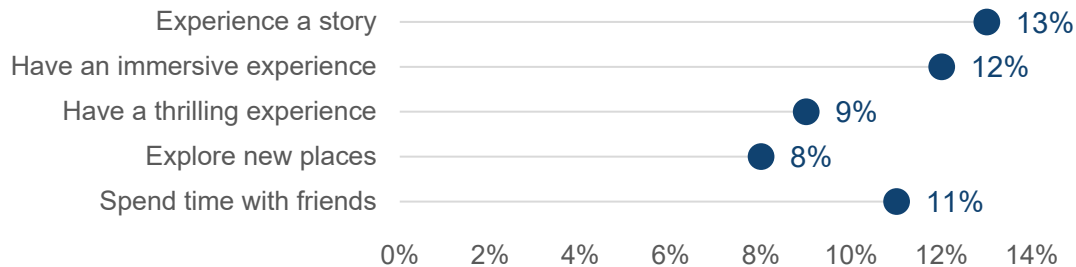
Top 5 motivations to play



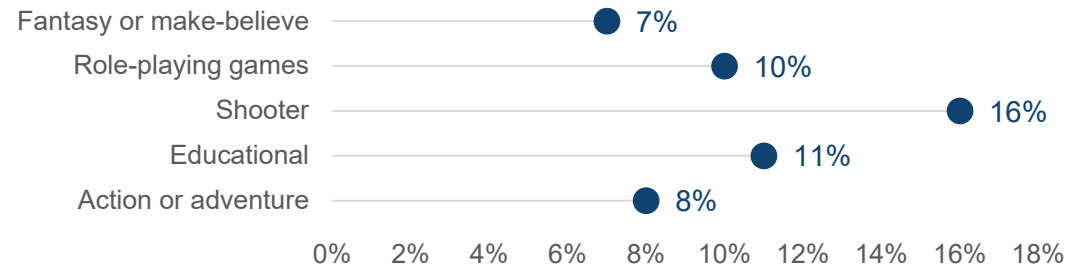
Top 5 genres to play



Top 5 unique motivations to play*



Top 5 unique genres to play*



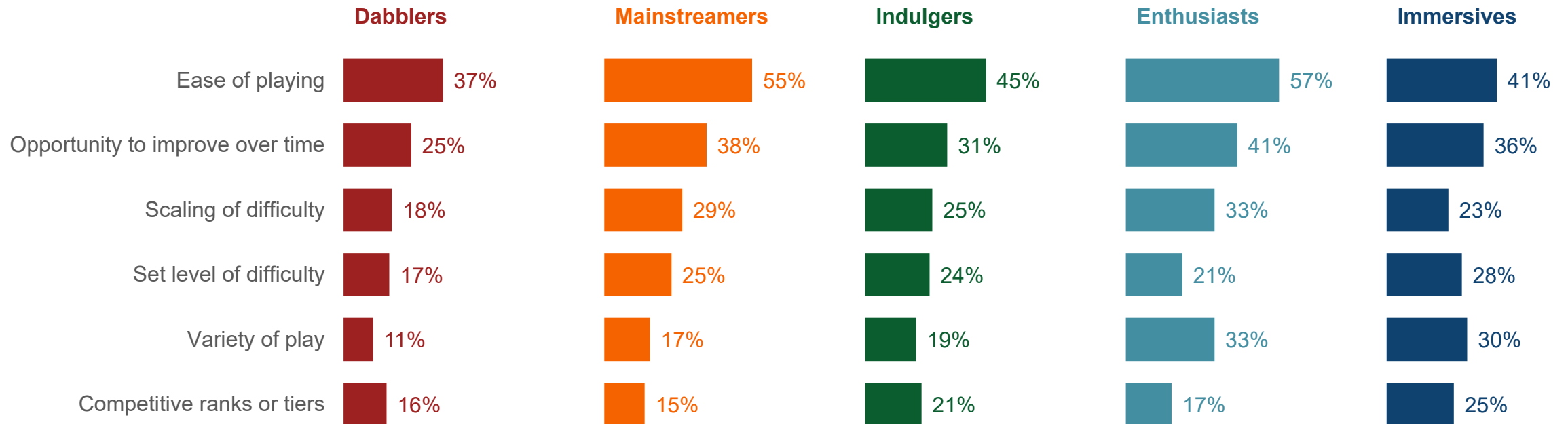
Base: Immersives (n=197)

Q43: Which of the following reasons are the most important to your enjoyment of video games? Q13: Please select your three favorite types of games from the list below that you typically like to play. Data shows any motivation selected 1 through 5. *Unique refers to sorted high to low by strength of over-indexing. See methodology for full definition.

Ease of play and opportunity to improve drive all segments.

Mainstream and Dabblers prioritize ease of play, while Enthusiasts and Immersives also look for variety and something that gives them a scaling challenge.

Percent who say the following are the most important features for video games
By 50-plus Gamer segment

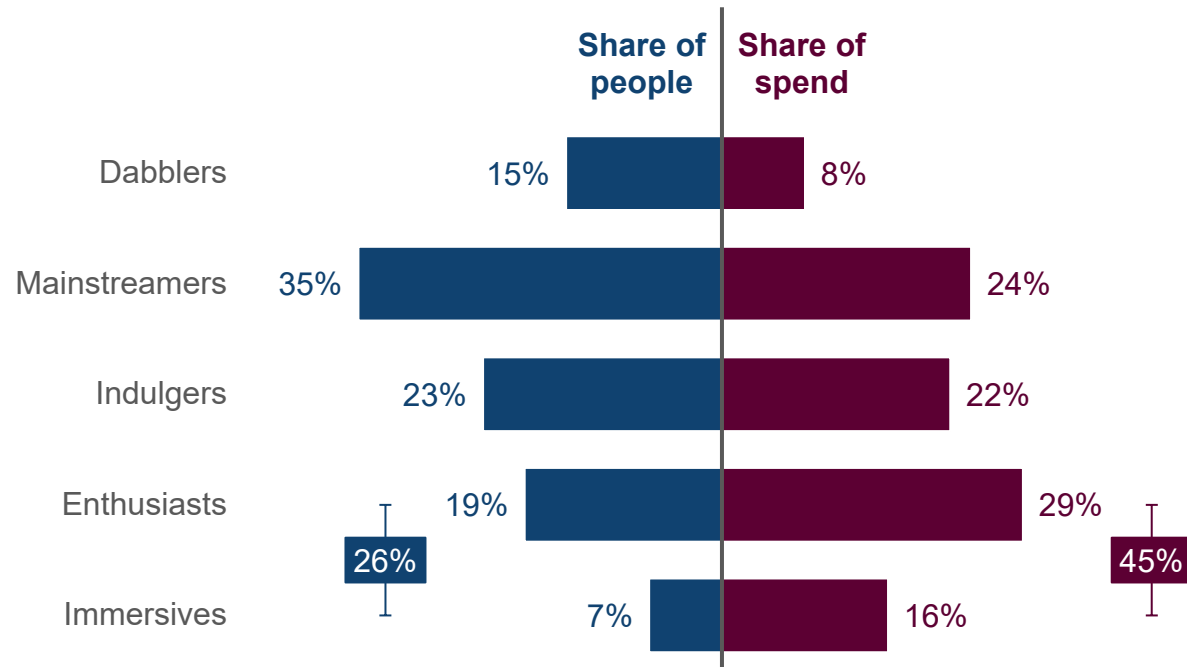


Base: Dabblers (n=403), Mainstream (n=934), Indulgents (n=612), Enthusiasts (n=511), Immersives (n=197)
Q44. Which of the following features are most important for video games to have for you to want to play them?

As passion for gaming increases, so does spending.

Less passionate “casual gamers” make up seventy-three (73%) percent of the 50-plus gamer segments, but Enthusiasts and Immersives account for almost half (45%) of all spend vs. 26% of older gamers.

Share of **people** versus share of **spend**
By gamer segment



Average six-month spend [January-June]
By gamer segment



Base: Dabblers (n=403), Mainstream (n=934), Indulgents (n=612), Enthusiasts (n=511), Immersives (n=197)

Q31. For the video-game related purchases you have made in the past 6 months, how much have you spent for these items

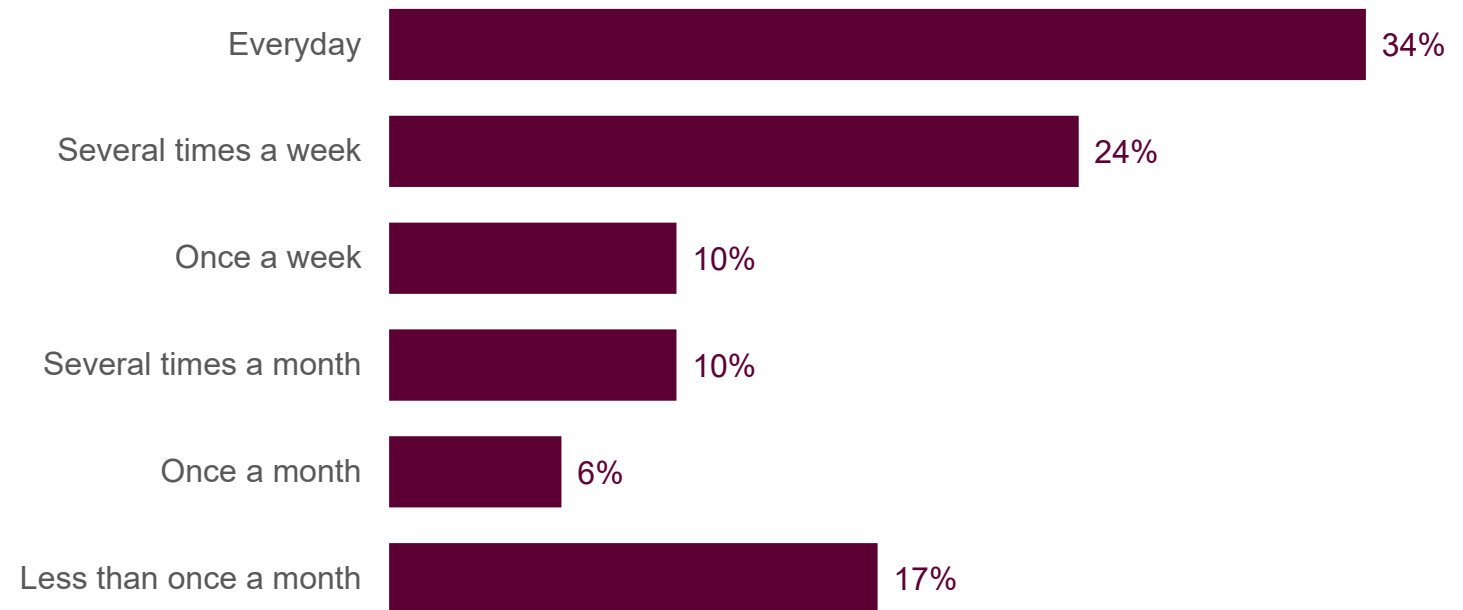
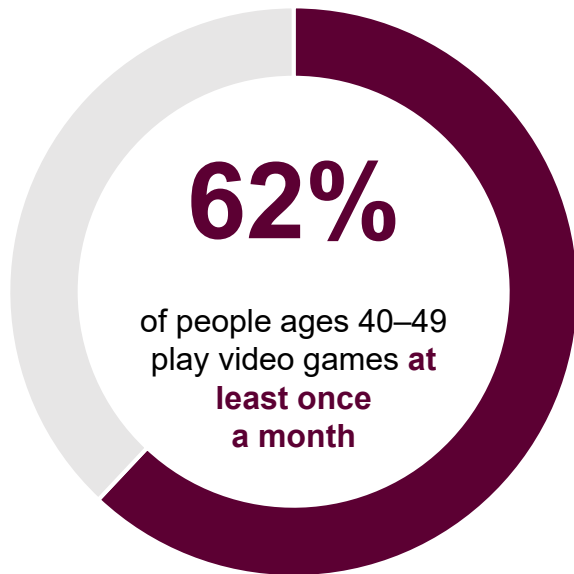


The 50-plus Gamer of Tomorrow

Gaming is a much more common activity for 40–49-year-olds.

Almost two-in-three play games monthly contrasting to less than half for 50-plus.

Frequency of playing video games
Among Gamers ages 40–49



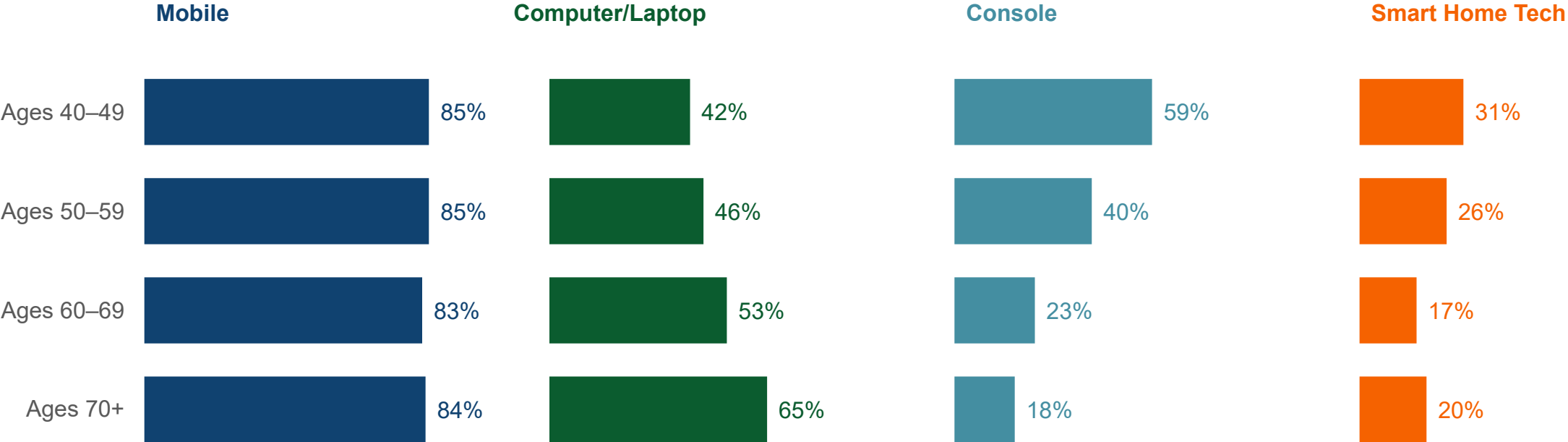
Base: (n=2,025 unweighted 40-49 years old, n=1,428 monthly gamers ages 40-49)

Q7: Generally speaking, how often do you play video games?

Age cohorts diverge drastically on PC and Console play.

Screen-free gaming on smart home tech is a potential opportunity to cater to gamers of all ages and abilities.

Devices used to play video games at least once a month
Among Gamers ages 40+, by age range

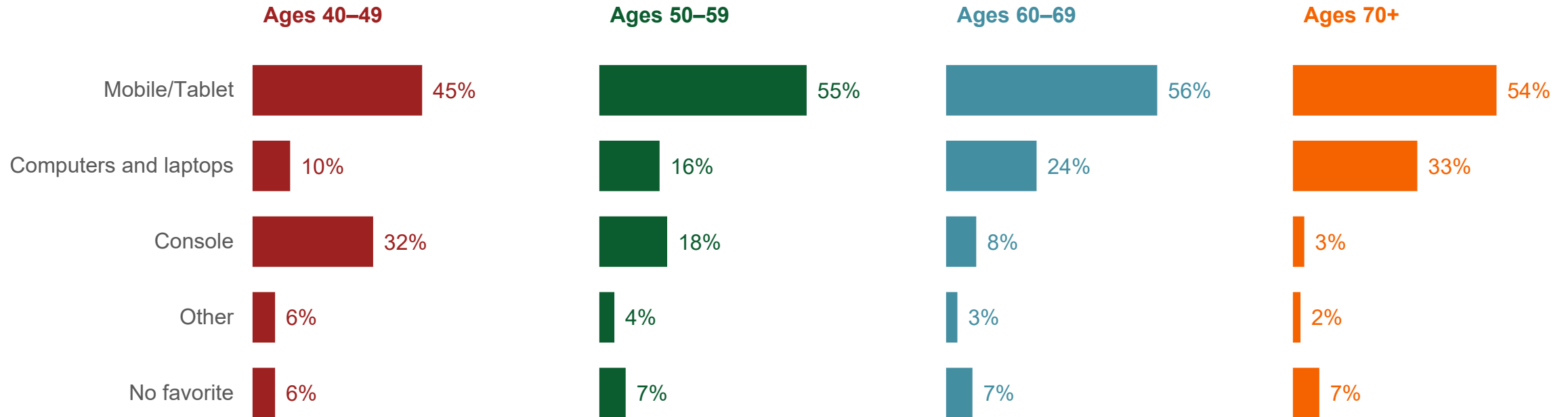


Base: Monthly Gamers – 40-49 (n=1,184), 50-59 (n=1,059), 60-69 (n=896), 70+ (n=703)
 Q8: Which of these systems or devices do you personally use for playing video games on at least once per month?
 *Smart Home technology includes Smart TV, Digital Media Players and Home Assistants.

Importance of mobile exemplified by its status as favorite.

Regardless of age, over half of 40-plus gamers say a mobile is their favorite device for gaming. Consoles are an emerging presence among 50-plus gamers but preferred more among the 40-49.

Favorite devices for gaming
Among gamers ages 40-plus, by age range



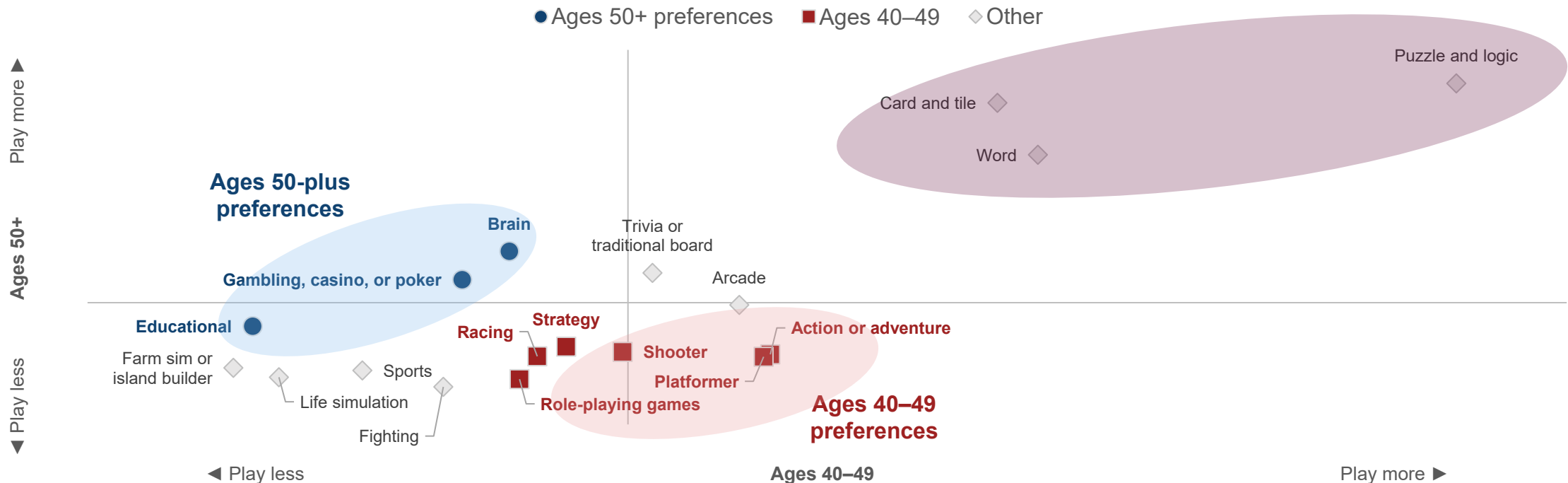
Base: Monthly Gamers 40-49 (n=1,184), 50-59 (n=1,059), 60-69 (n=896), 70-plus (n=703)

Q10: Which of the following is your favorite device to play video games on?

The top three genres; puzzle/logic, card and tile, and word, are consistently played across ages.

But 50-plus Gamers prefer brain and gambling/casino games more than younger gamers.

Percent who play the following game genres, ages 40–49 vs. ages 50-plus
Among gamers ages 40-plus who play games at least monthly



Base: Monthly Gamers – 40-49 (n=1,265), 50-plus (n=3,168)

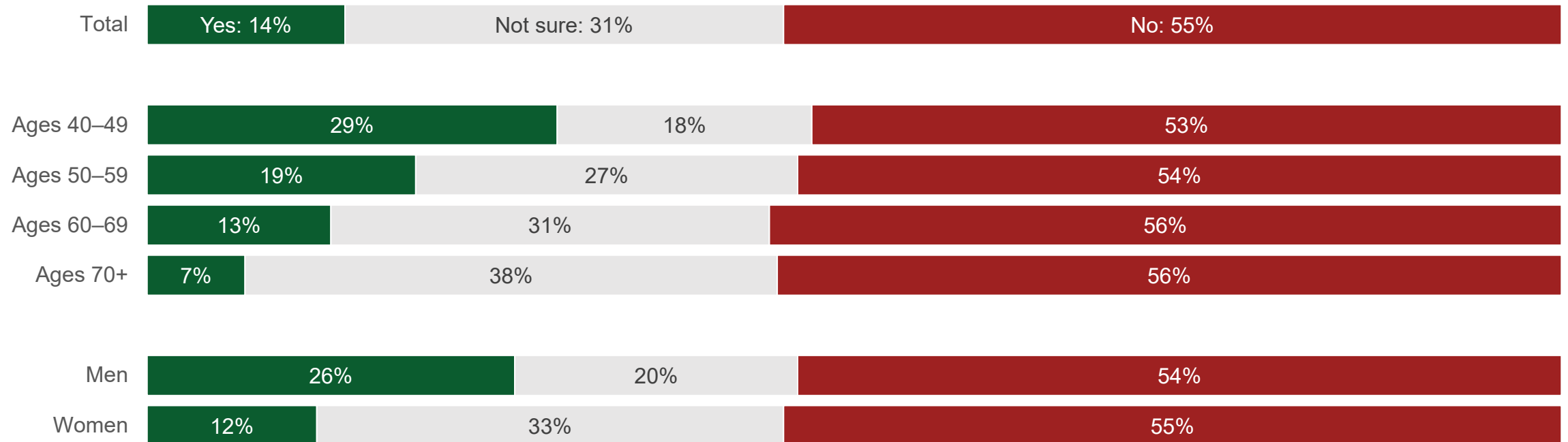
Q12: Please select the types of games from the list below that you typically like to play?

Excludes genres with less than 25% play for both 40-49 and 50-plus

Retro gaming is more popular among younger males.

The concept of retro is not analogous across audiences, with older gamers and women not sure if they've played a retro game in the past 6 months.

Percent who have played a retro game in the past six months
Among Gamers ages 40+ , and by demographic characteristics



Base: Monthly Gamers - 50-plus (n=2,657, 40-49 (n=1,184), 50-59(n=1,059), 60-69 (n=896), 70+ (n=703), Male (n=1,750), Female (n=2,091)

Q52B: In the last 6 months have you played a retro game?

A photograph of two women sitting on a couch, both holding and aiming green water guns. The woman on the left is older, with short white hair and glasses, wearing a light-colored top and a yellow scarf. The woman on the right is younger, with braided hair, wearing a pink top and a yellow scarf. They are both smiling and looking towards the camera. The background is a blurred indoor setting with a dark couch and wooden paneling.

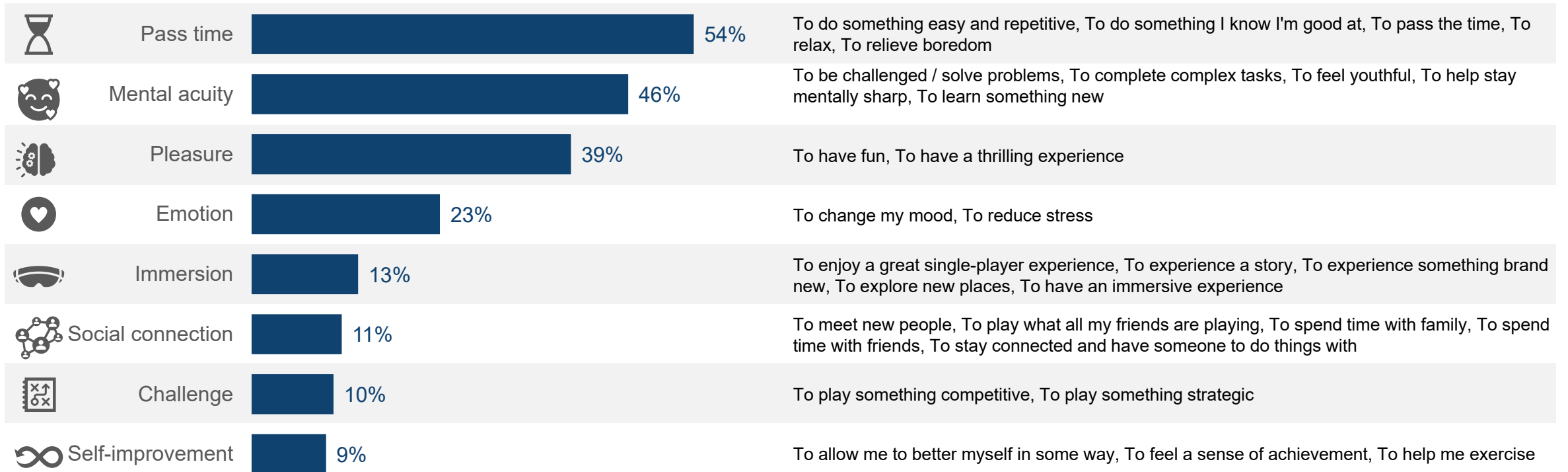
The Benefits of Play

Play motivations factor into 8 categories.

30 motivations for gaming with similar ratings were grouped together into eight categories.*

Motivations for gaming (percent ranking 1, 2 or 3)
Among Gamers ages 50-plus

Motivational Factor Components



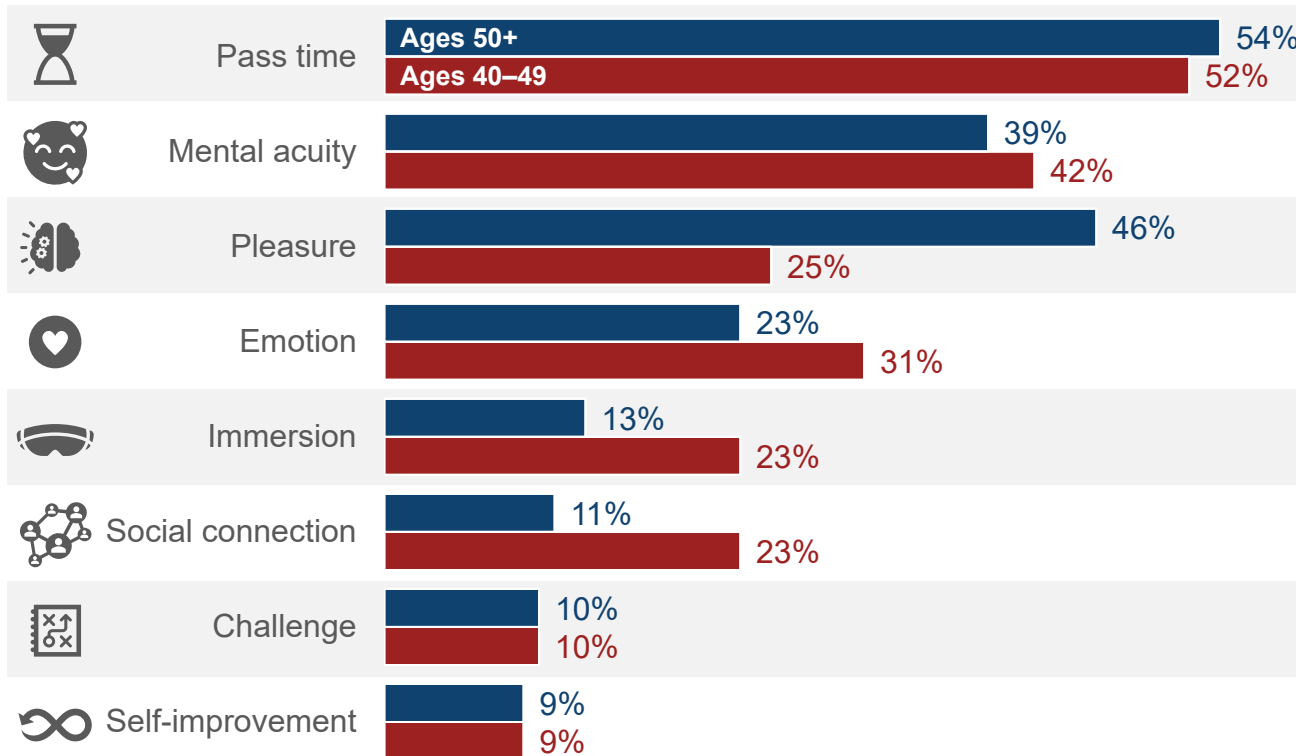
Base: 50-plus Monthly Gamers (n=2,657)

Q43: Which of the following reasons are the most important to your enjoyment of video games?...

*Refer to the methodology report for more information about factor analysis and the technique used.

Mental Acuity is a strong motivating factor for 50-plus Gamers.

Motivations for gaming (percent ranking 1, 2 or 3)
Among Gamers ages 40+ , by age



Passing the time is the top motivator for game play across age cohorts, but that's where similarities largely end. The 40-49 are playing more frequently for emotional benefits, feeling immersed and social connection, while the 50-plus enjoy games that offer them greater mental stimulation.

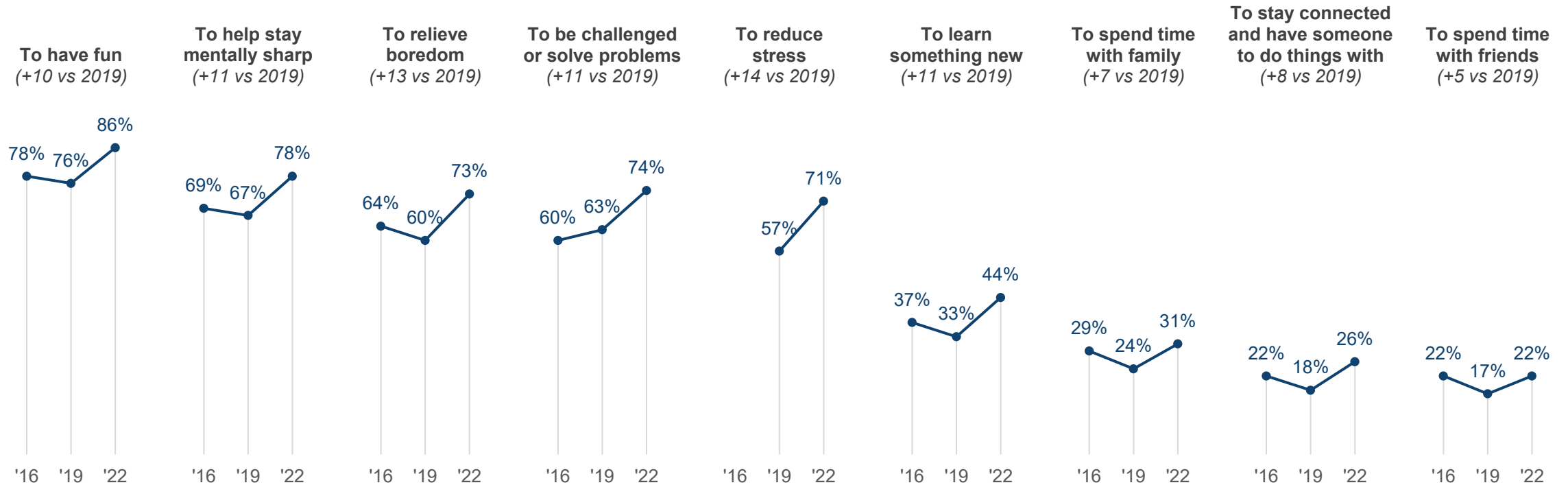
Base: Monthly Gamers 40-49 (n=1,265), 50-plus (n=3,168)

Q43: Which of the following reasons are the most important to your enjoyment of video games?...

Relieving stress and boredom have grown most in importance.

Potentially due to restrictions/stresses associated with COVID, these two motivators for playing have outpaced many other reasons for play among 50-plus Gamers.

Percent who say the following reasons for playing video games are extremely/very important
Among Gamers ages 50-plus



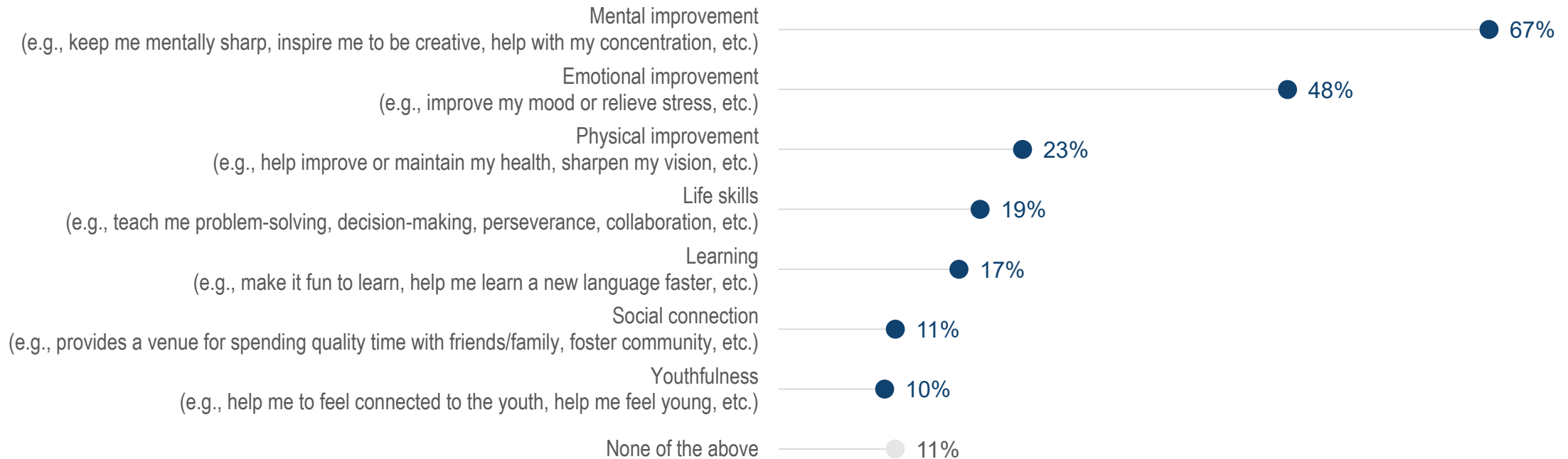
Base: 50-plus Gamers – 2016 (n=1,112), 2019 (n=1,664), 2022 (n=2,657)

Q42: In general, how important are the following reasons for playing video games?

Mental and emotional reasons dominate core benefits of play.

Mental and emotional stimulation underpin the core benefits 50-plus gamers feel they get from play. Youthfulness and social connection are less pronounced benefits, but still important.

Percent who say video games help them in the following ways
Among Gamers ages 50-plus



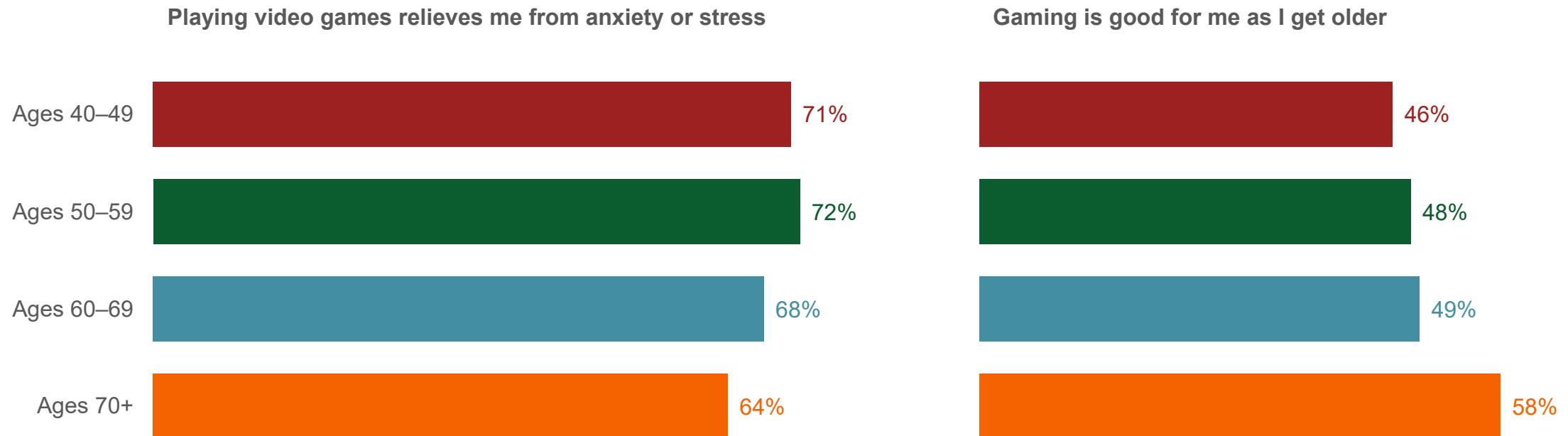
Base: 50-plus Monthly Gamers (n=2,657)

QTERM4: Gamers - In what ways do you believe playing video games most helps you?

The benefit of gaming becomes more apparent as you age.

While players of all ages feel relief from anxiety/stress, gaming is viewed as more beneficial to players as they get older.

Percent who completely or somewhat agree with the following statements about gaming
Among Gamers ages 40+, by age range



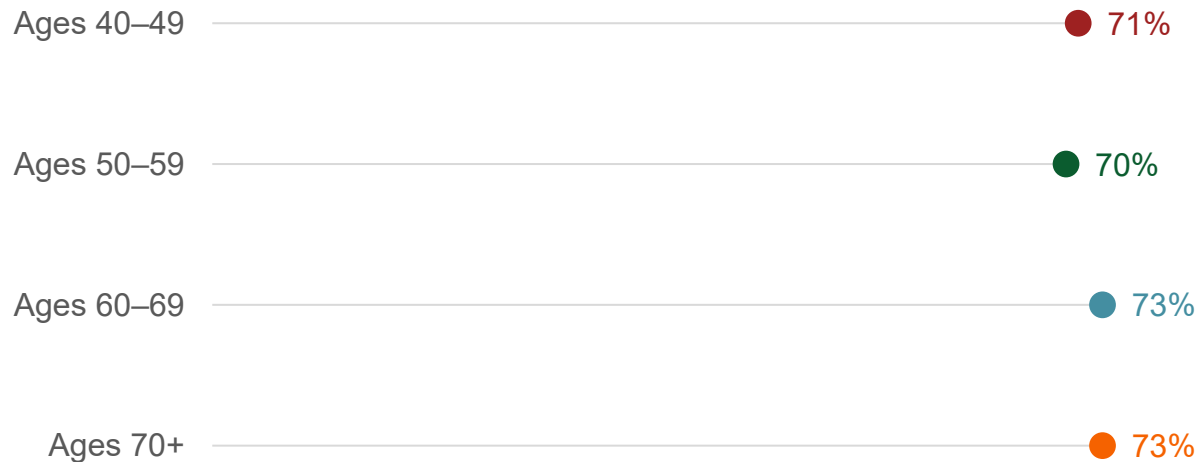
Base: Monthly Gamers – 40-49 (n=1,184), 50-59 (n=1,059), 60-69 (n=896), 70+ (n=703)
Q48. Please indicate how much you agree or disagree with each of the following statements

‘Play’ is an important aspect of healthy aging for everyone.

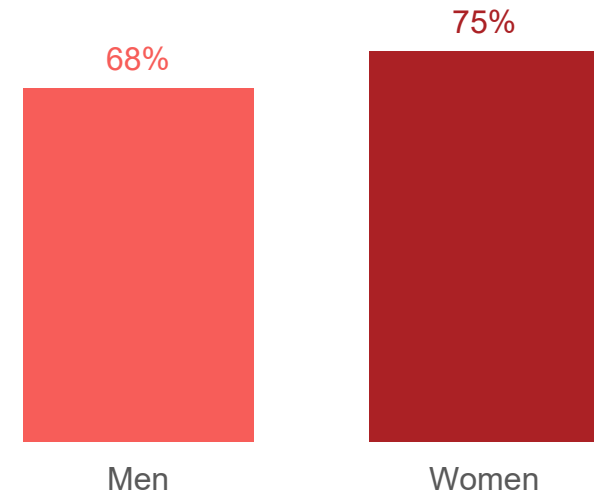
Three in four (77%) 50-plus gamers view meaningful play- which includes gaming- as important to healthy aging. Women (both gamers and non-gamers) view ‘play’ as more important, potentially explaining the greater number of Women Gamers ages 50-plus.

Percent who think play is extremely or very important for aging
Among adults ages 40+

By age range



By gender



Base: Gamers and Non-Gamers - 40-49 (n=1,919), 50-59 (n=2,052), 60-69 (n=2,014), 70+ (n=1,900), Male (n=3,697), Female (n=4,188)

QTERM5: Thinking about your life experience overall, how important do you consider 'play' to be for aging? Play can be any internally motivated activity done for fun, pleasure or enjoyment.

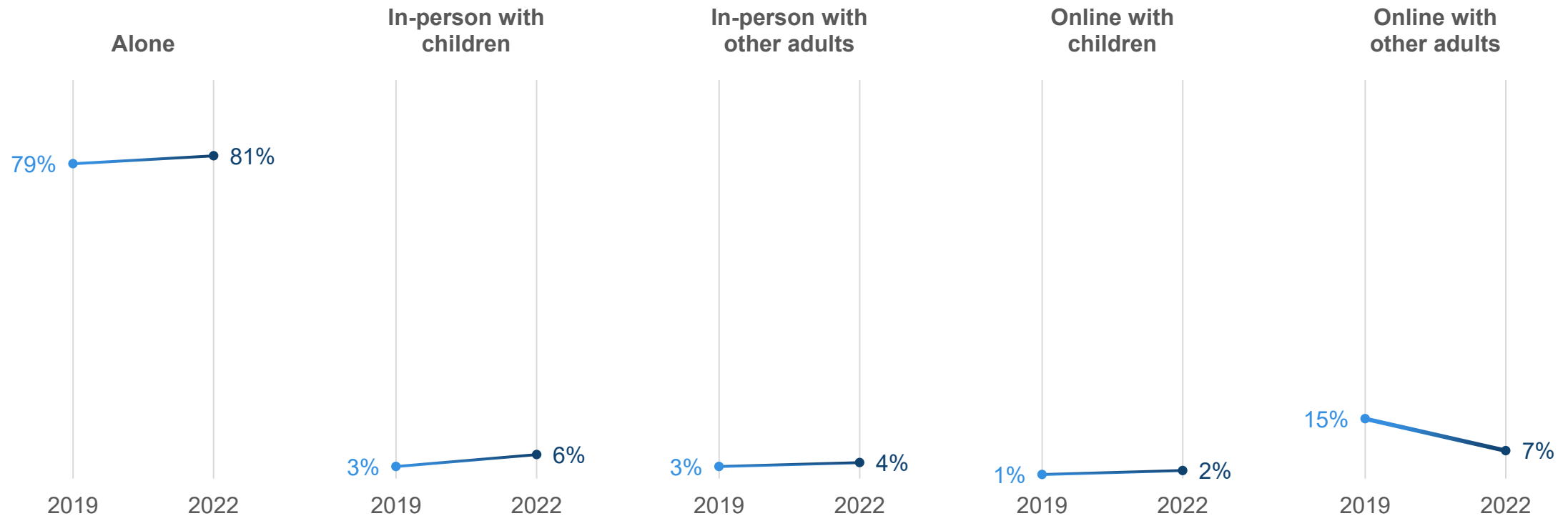


Gaming and Social Connections

Play continues to be a predominantly solo endeavor.

The share of time 50-plus Gamers spend playing online with other adults has dropped since 2019.

Percentage of time spent playing video games alone versus with other people
Among Gamers ages 50-plus



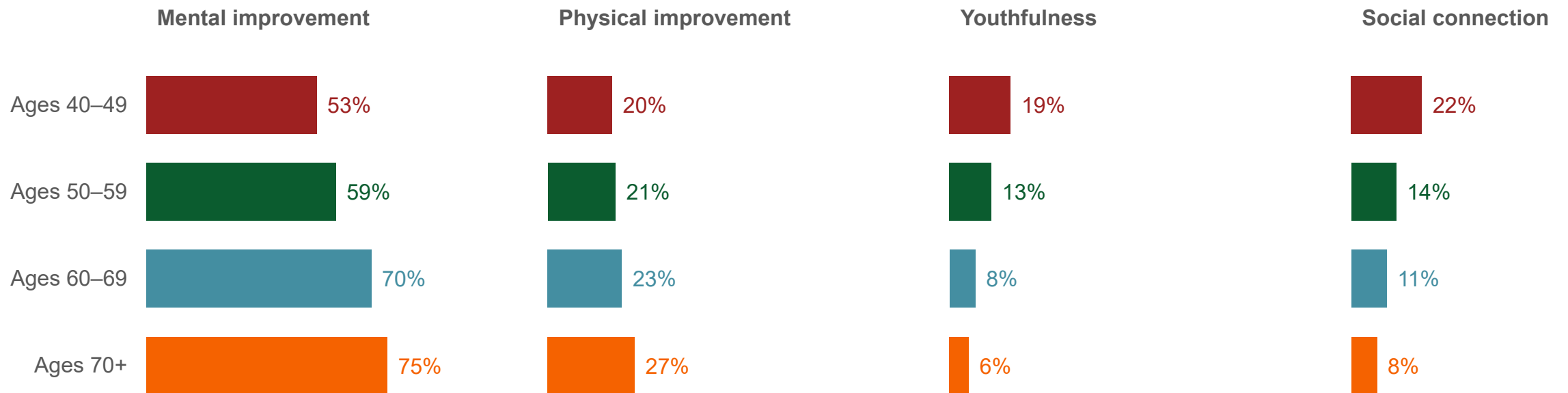
Base: 50-plus Monthly Gamers – 2019 (n=1,664), 2022 (n=2,657)

Q23A: What proportion of your game play would you say is done alone versus playing other people, such as children (under 18 years of age) or adults?

Younger Gamers believe they benefit more from the social connection aspect of gaming.

Mental improvement is more important to older age groups, while emotional improvement transcends age cohorts.

Percent who say playing video games benefits them in the following ways
Among Gamers ages 40+, by age range



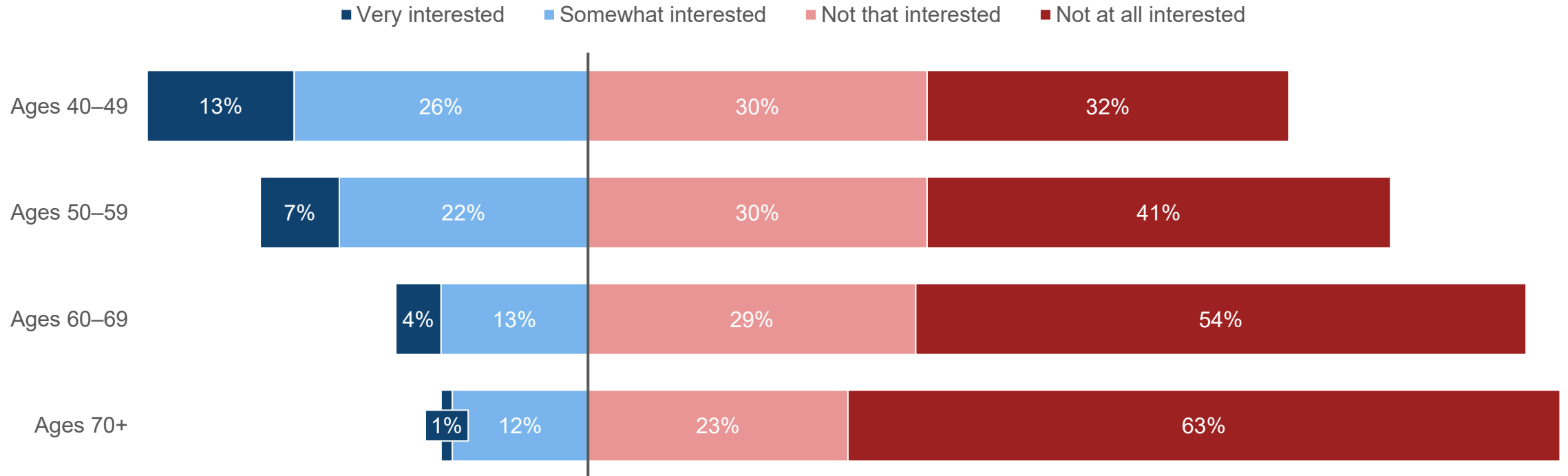
Base: Monthly Gamers – 40-49 (n=1,184), 50-59(n=1,059), 60-69 (n=896), 70+ (n=703)

QTERM4: Gamers - In what ways do you believe playing video games most helps you? Non-Gamers - In what ways do you believe playing video games could most help you if you were to start playing?

Younger age cohorts have stronger community desires when it comes to gaming.


Two in five Gamers in their 40's are interested in social gaming communities.

Level of interest in being part of a social community of gamers like themselves
Among gamers ages 40+ who play games at least monthly, by age range



Base: Monthly Gamers - 40-49 (n=1,184), 50-59(n=1,059), 60-69 (n=896), 70+ (n=703)

Q51B: How interested would you be in being part of a social community of Gamers or connecting with Gamers like you?



Barriers to Play and Frustrations With Gaming

Gating progress behind ads derails enjoyment of a game.

Gating progress behind microtransactions, e.g., requiring gamers to watch ads or make a purchase to continue, is a major frustration to over half of all older Gamers.

Percent who say the following somewhat or strongly decreases their enjoyment of video games
Among Gamers ages 50-plus



Cost
is the biggest barrier to playing more for 50-plus Gamers

Base: 50-plus Monthly Gamers (n=2,657)

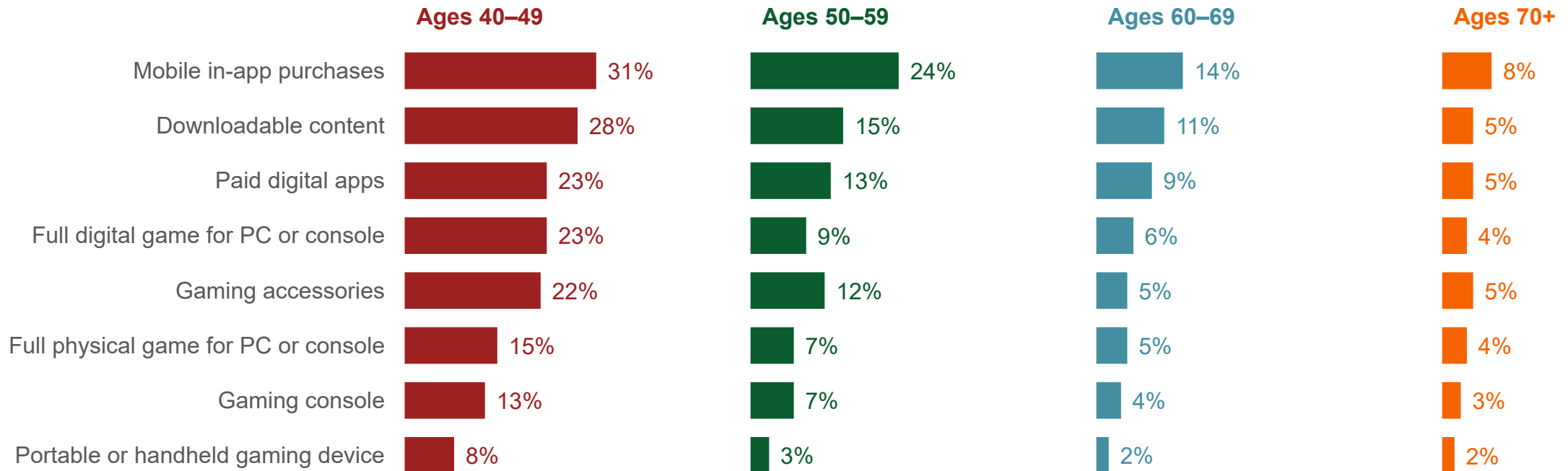
Q33: How much do the following impact your enjoyment of video games? Q49A. Please select the top 3 barriers you believe hold you back from playing video games as much as you would like. Rank your top 3 barriers from 1 through 3 where 1 is the biggest barrier and 3 is the smallest

Younger Gamers have more expensive gaming behaviors than older Gamers.

Gaming-related purchases across categories are more elevated in younger age cohorts.

Percent who have purchased the following video game-related items for themselves in the past six months

Among Gamers ages 40+, by age range



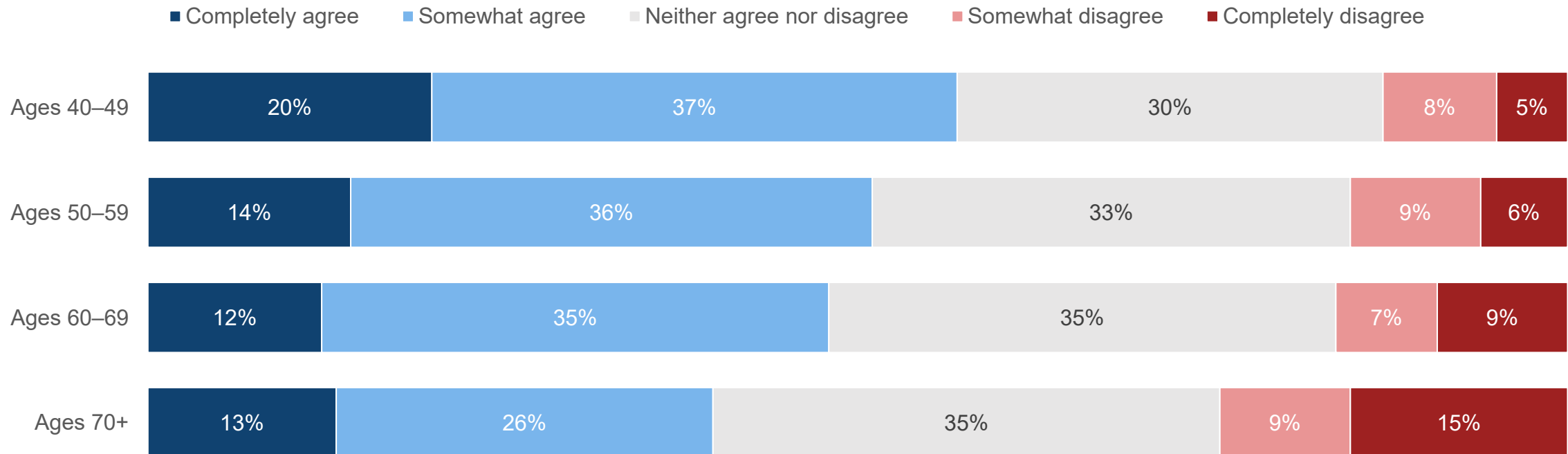
Base: Monthly Gamers - 40-49 (n=1,184), 50-59(n=1,059), 60-69 (n=896), 70+ (n=703)

Q30: In the last 6 months, which of the following video-game related items have you purchased for yourself?

Gamers age 70-plus are more likely to struggle to find games made for them.

Less than half of all age groups over 50 agree that they're able to find games made for them.

Agreement with "I can find video games that are made for me"
Among Gamers ages 40+, by age range



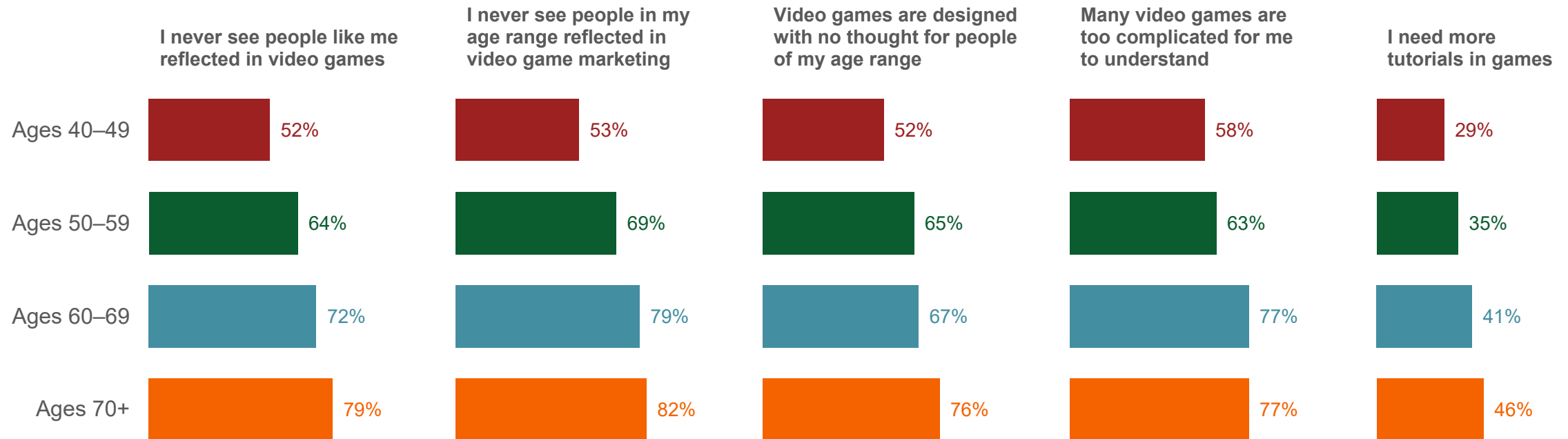
Base: Monthly Gamers – 40-49 (n=1,184), 50-59(n=1,059), 60-69 n=896), 70+ (n=703)

Q48. Please indicate how much you agree or disagree with each of the following statements:

Older Gamers feel marginalized from the industry.

From not seeing themselves reflected in marketing, to not feeling reflected in games themselves, older Gamers don't feel like the industry is serving them appropriately.

Percent who choose the following statements about video games
Among Gamers ages 40+, by age range



Base: Monthly Gamers – 40-49 (n=1,184), 50-59 (n=1,059), 60-69 (n=8961,175), 70+ (n=703)

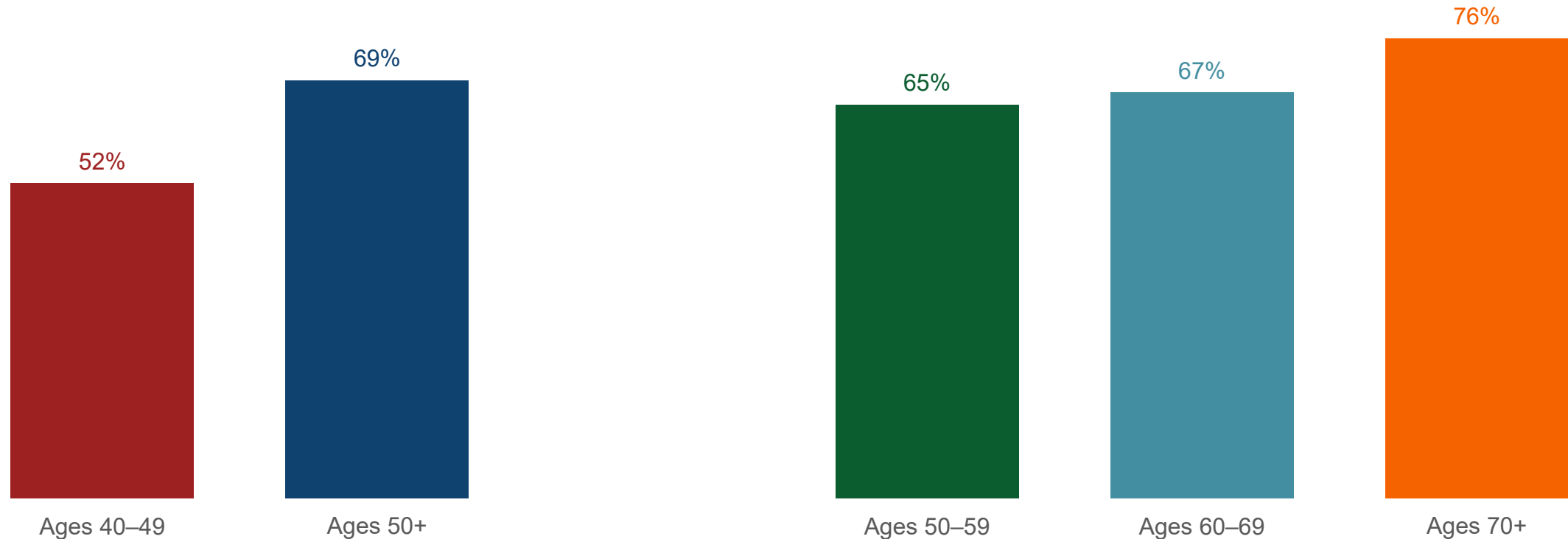
Q50: Which of the following best represents your opinion about video games?

Most older Gamers believe games lack age-inclusive design.

Seven in ten (69%) 50-plus Gamers feel video games are designed without consideration of being age-inclusive.

Percent who agree that "video games are designed with no thought for people my age range."

Among gamers ages 40+ who play games at least monthly, by age range



Base: Monthly Gamers – 40-49 (n=1,184), 50-59 (n=1,059), 60-69 (n=896), 70+ (n=703), 50-plus Monthly Gamers (n=2,657)

Q50. Which of the following best represents your opinion about video games?

Objectives

- Track the evolution of the 50-plus gamer over time (since 2016), including how overall market size, gaming perceptions, behaviors, attitudes, motivations, and preferences have changed.
- Segment the 50-plus gamer in meaningful, actionable cohorts to better understand shared and unique characteristics.
- Assess the 50-plus gamers of the future: how do 40–49-year-old gamers differ in their gaming behaviors and motivations compared to the 50-plus gamer.
- Gauge what barriers still exist to play among gamers and non-gamers, and what can be done to potential encourage the benefits of gaming.



Methodology

- **Methodology:** Online survey via NORC's *Foresight 50-plus*® Panel, supplemented with respondents from non-probabilistic consumer panels.
- **Qualifications: Gamers:** Ages 40+, owns a gaming-eligible device (e.g., mobile, tablet, computer, laptop, console, or other device), and plays video games on that device at least once per month.
- **Non-Gamers:** A subset of Non-Gamers was fielded a smaller survey with a more limited scope of questioning.
- **Sample:** N=7,885 50-plus total completes.
 - Gamers 50-plus: n=5,953
 - Gamers 40-49: n=2,025
 - Non-Gamers 40-plus: n=2,630
- **Interviewing Dates:** June 23rd – July 13th, 2022.
- **Weighing:** Data was weighted using population benchmarks from NORC's Current Population Survey for age, gender, division, race/ethnicity, education, housing tenure, household phone status, age x gender, and age x race/ethnicity.
- **Survey Length:** Median – Gamers (32 minutes), Non-Gamers (7 minutes).



Segmentation Methodology and Process 1

Methodology: K-Means Clustering Analysis

Process:

1. Initial questions were identified for model input based on:

- a. Overall study objectives
- b. Prior research and segmentation X
- c. Degree of variability within the data upon analysis

2. 5 separate models were run and analyzed with the following intent:

- a. Like-for-like 2019 model (device, time of day play, genre, spend, motivations, eSports familiarity)
- b. 50-plus model with expanded variables (device, hours spent playing, play behavior, social connection interest, meaningful play, motivations, gameplay features, gaming reasons)
- c. 40+ model with expanded variables (device, hours spent playing, play behavior, social connection interest, meaningful play, motivations, gameplay features, gaming reasons)
- d. 50-plus model with selected variables (motivations, gaming self-perceptions)
- e. 40+ model with selected variables (motivations, gaming self-perceptions)
- f. Unique Motivations to Play represent highest indexing Motivations for the segment vs. total. Motivation had to have been selected by more than 5% of the segment and scored higher than total to qualify as uniquely motivating.

3. Variables were adjusted and transformed

- a. Initial gaming motivations was overpowering initial models, so gaming motivations (any ranked 1-3) was used as an alternative input into the scheme
- b. Any variable with the Responses “Don’t Know”, “Refused” or “Skipped” were given a value of zero.

Segmentation Methodology and Process 2

Process:

4. Schemes were analyzed on various criteria:

- a. No uneven distribution of segments (i.e., no segment over 40%, no segment under 5%).
- b. Segments that displayed diversity across data outside of input variables.
- c. Intuitiveness of segments and ease of understanding.
- d. Simplicity of replication in future studies.

5. All models produced strong contender segmentation schemes, but schemes 4 and 5 stood out.

- a. Schemes 4 and 5 produced very comparable segments, except for the Enthusiast segment which did not exist in Segment 4.
- b. Scheme 4 had slightly more muted behaviors that diluted the more passionate segments, whereas scheme 5 more effectively highlighted Enthusiast and Immersive segments. Scheme 5 has the added benefit of native 40–49-year-old segment allocation, meaning no loss in accuracy when looking at the segment breakdown of the 40–49-year-old group.

6. Final scheme selected (scheme 5), can be predicted using the least number of questions in future studies:

- a. Age (minimum 40+)
- b. Device Ownership (must own at least one electronic device that can be used for gaming)
- c. Gaming Frequency (must play video games at least once per month – can be stretched to any gaming frequency)
- d. Gaming Motivation Importance
- e. Gaming Motivations: Rank Top 5 Motivations
- f. Gaming Reasons for Play

Factor Analysis Methodology and Process

- Principal Component Analysis was run to understand how different individual gaming motivations bucket into groups (factors) underpinning video game enjoyment.
- Analysis was performed on the **most important** reasons underpinning enjoyment – respondents were asked to select and rank their top 5.
- Initial Principal Component Analysis isolated 10 factors; some showing promise while others needed logical adjustments. Factors were a-priori adjusted to better combine “like-for-like” motivations, ultimately creating 8 factors.
- Factor scores were calculated using the net score for top 3 importance for any item within the factor.

Final Factor Composition

Passing Time	To do something easy and repetitive, To do something I know I'm good at, To pass the time, To relax, To relieve boredom
Pleasure	To have fun, To have a thrilling experience
Mental Acuity	To be challenged / solve problems, To complete complex tasks, To feel youthful, To help stay mentally sharp, To learn something new
Emotion	To change my mood, To reduce stress
Immersion	To enjoy a great single-player experience, To experience a story, To experience something brand new, To explore new places, To have an immersive experience
Social-Connection	To meet new people, To play what all my friends are playing, To spend time with family, To spend time with friends, To stay connected and have someone to do things with
Challenge	To play something competitive, To play something strategic
Self-Improvement	To allow me to better myself in some way, To feel a sense of achievement, To help me exercise

Base: 40+ Gamers of any frequency (n=3,841) Q43. Which of the following reasons are the most important to your enjoyment of video games? Please select and rank your top 5 reasons from 1-5, with 1 being the most important reason



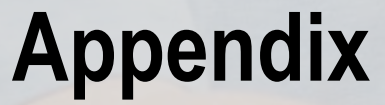
Brittne Kakulla, PhD AARP Research

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For media inquiries, please contact

media@aarp.org

This research was designed and executed by AARP Research

The word 'Appendix' is written in a large, bold, black sans-serif font. It is centered within a light gray rectangular box that has a red square on its left side. The box is overlaid on the photograph of the man and woman playing video games.

Two-thirds of 50-plus Gamers who play with others communicate with their gaming partners.

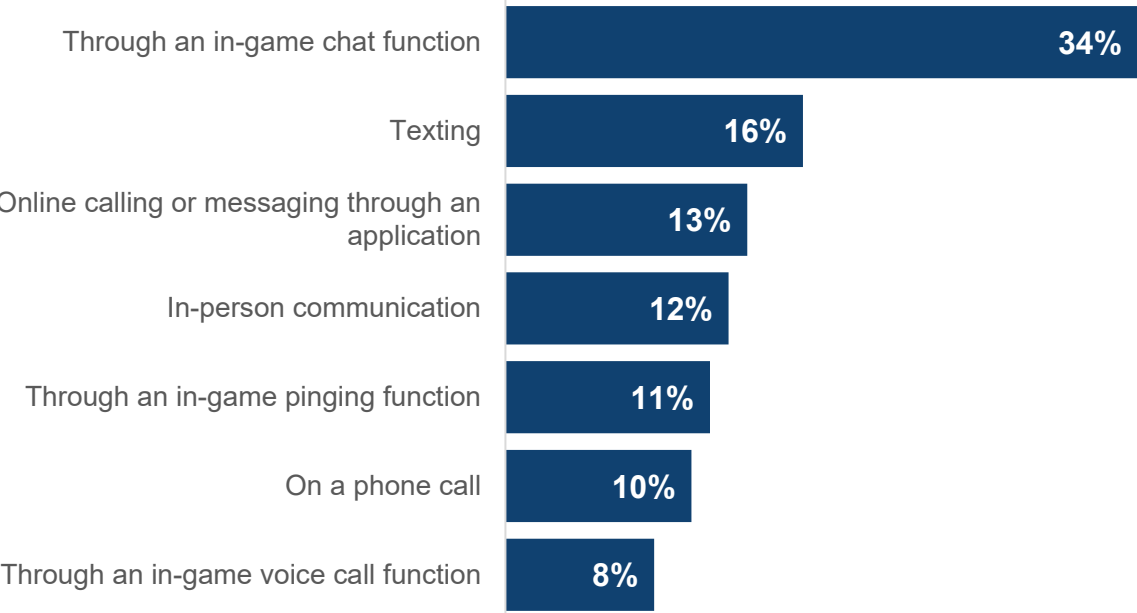
In-game chat functions are the most popular means for communication.

68%



Of 50-plus Gamers who play with others use communication tools while gaming.

Online gaming communication tools
(Among 50-plus Gamers who play with other people)

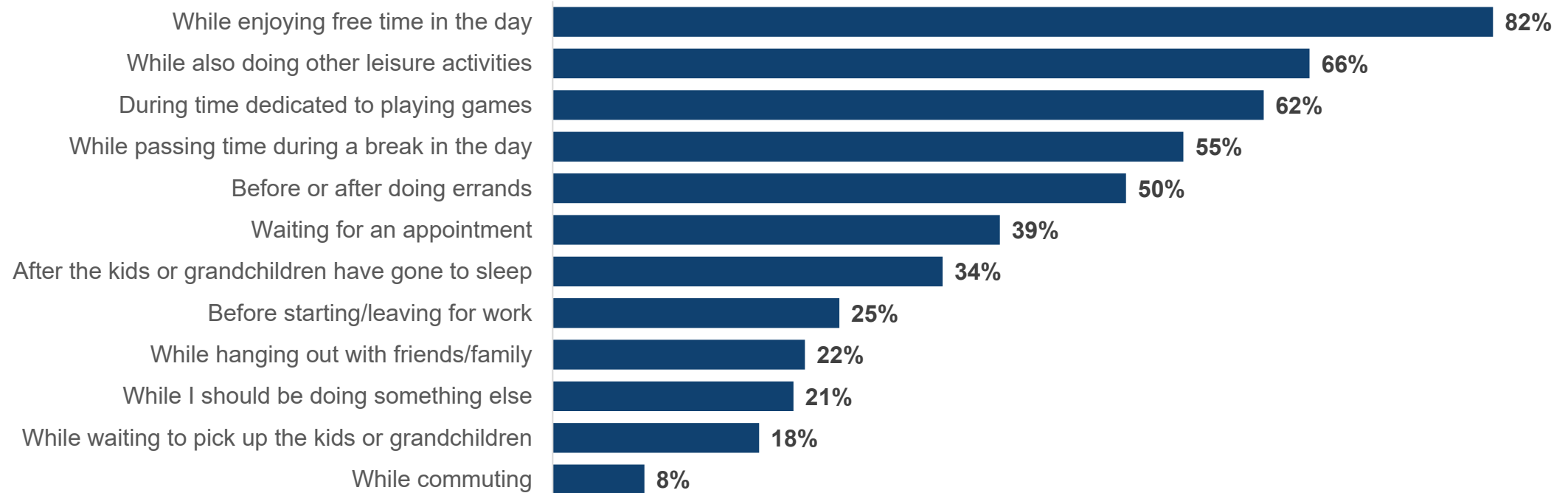


Base: 50-plus Monthly Gamers who play online with other people (n=827)
Q24: When you play video games with other people online, how do you typically communicate with them?

Gaming mostly fills the void in free-time throughout the day.

Older gamers also frequently fit gaming around other activities, be that leisure activities, breaks in the day, errands, or appointments.

Participation in Other Activities While Gaming (Gamers age 50-plus)

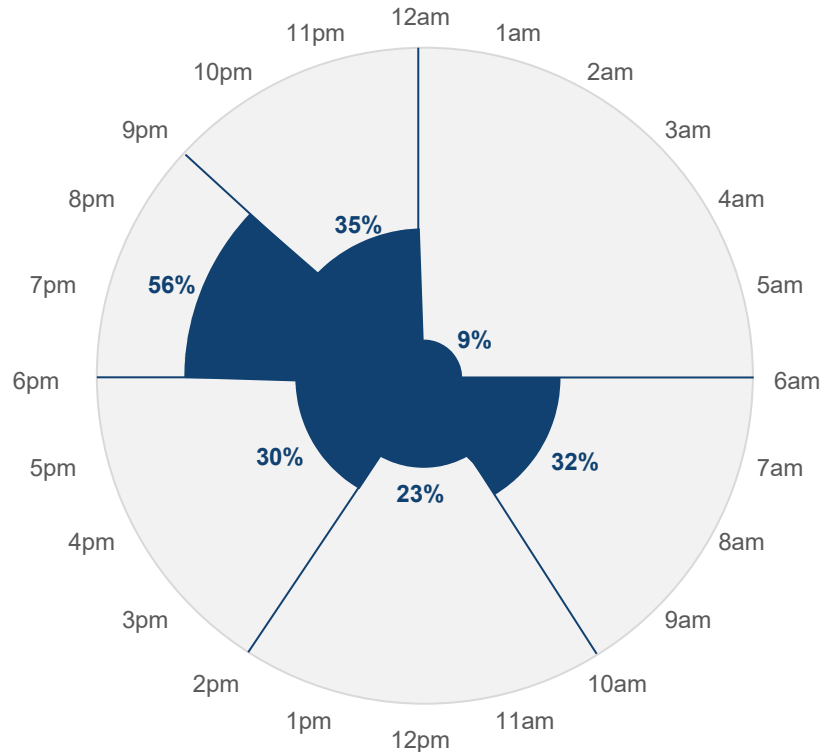


Base: 50-plus Gamers (n=2,657)

Q28A. Are you ever likely to be playing games while doing any of the following activities during this time period?

Evening (6pm-9pm) is the prime gaming window.

Times of day playing video games
(Gamers age 50-plus)




Base: 50-plus Gamers (n=2,657)

Q28: What times of day do you typically play video games?


Q29A: Do you ever play video games at any of the following times?

Play fluctuates a lot throughout the day with peaks of activity throughout the day, but the hours of 6pm-9pm is where the majority of gaming is played for 50-plus Gamers.



77%

Reporting playing right before they going to bed at night

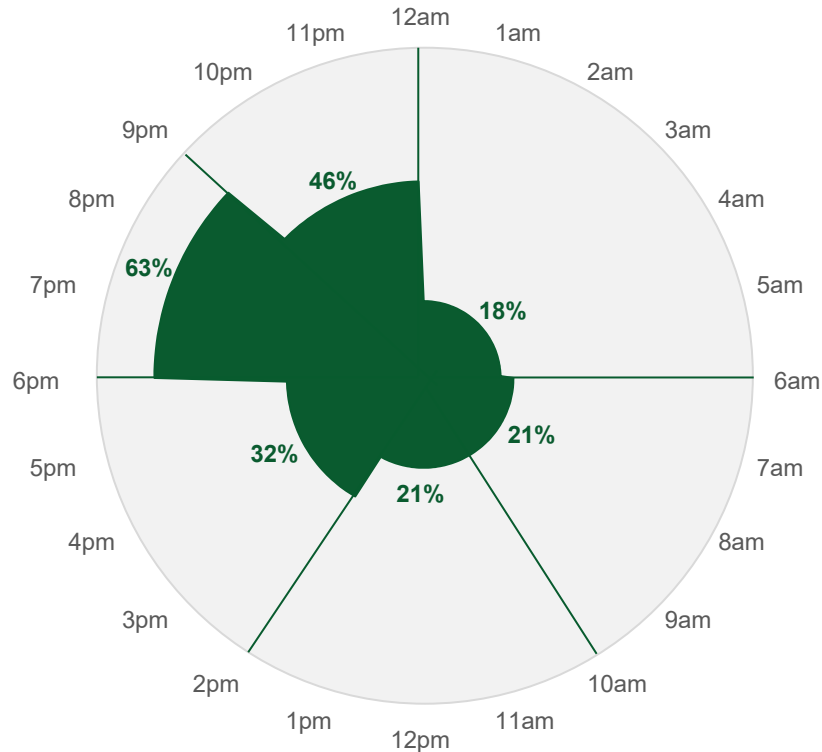


40%


Reporting playing right when they wake up in the morning

Evening is also the prime gaming window for Gamers in their 40s.

Times of day playing video games
(Gamers ages 40-49)




40–49-year old gaming hours bleed more frequently into the later hours of the night, with nearly half (44%) playing between 9pm and 12am.



85%

Reporting playing right before they going to bed at night



43%

Reporting playing right when they wake up in the morning

Base: 40-49 Gamers (n=1,919)

Q28: What times of day do you typically play video games?

Q29A: Do you ever play video games at any of the following times?

Top Game Names by Genre for 50-plus Gamers

Card & Tile Games (net)	1540
Solitaire (sub-net)	1122
Solitaire (non-specific)	920
Free Cell	247
Spider Solitaire	129
Pyramid solitaire	88
Tri Peak solitaire	83
Klondike Solitaire	80
Miscellaneous mentions of solitaire	47
Card games (non-specific)	42
Mahjong	40
Spades	37
Hearts	29
Dominos	28
Euchre	23
Pokémon	21
Pokémon Go	17
Uno	17
Yahtzee	14
Gin Rummy (various mentions)	14
Miscellaneous mentions of Mahjong	14

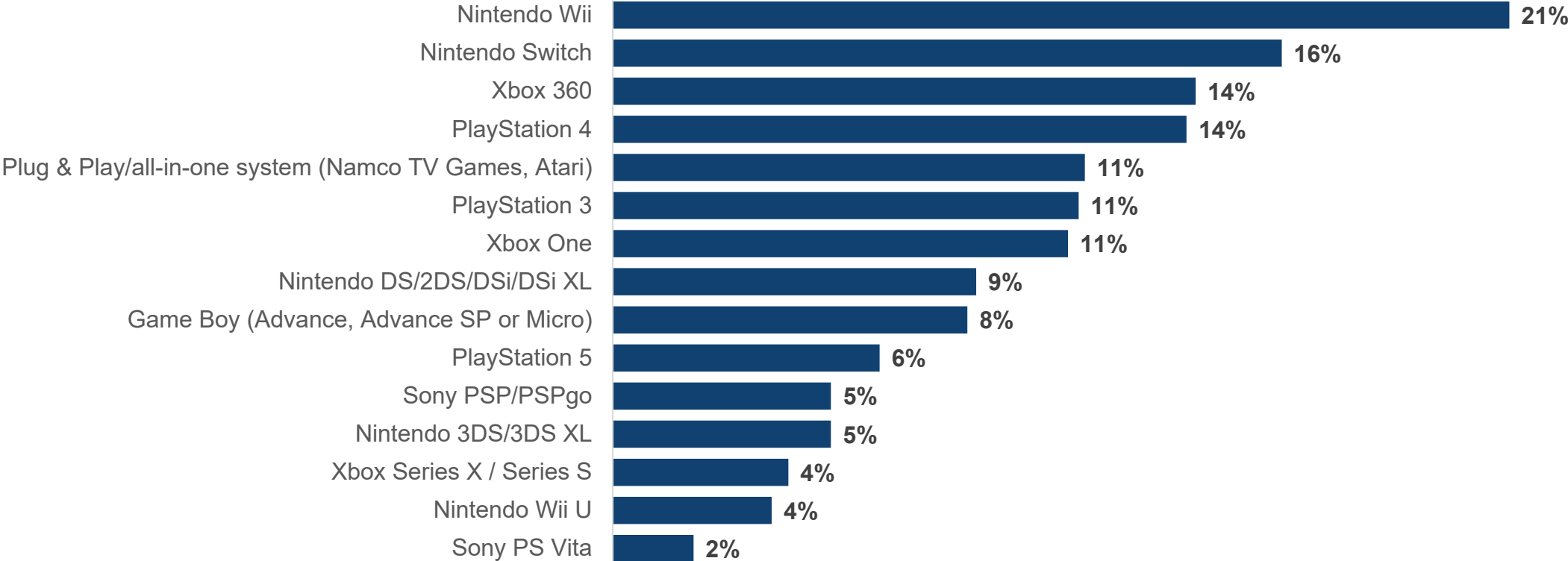
Puzzle/Logic games (net)	1508
Candy crush (sub-net)	532
Candy crush (non-specific)	437
Sudoku	380
All other mentions of puzzle/logic games	311
Bejeweled (sub-net)	149
Bejeweled/jewel	100
Angry Birds	99
Miscellaneous mentions of match games	82
Hidden Objects	74
Candy Crush Saga	70
Puzzles	69
Tetris	67
Jigsaw puzzles	67
Candy Crush Soda	65
Miscellaneous mentions of jewel/bejeweled games	50
Royal Match	29
Other Merge game mentions	20
Merge Dragons	19
Miscellaneous mentions of angry birds	18
Gardenscapes	17
Candy Crush Friends	15
Miscellaneous mentions of Candy Crush	11

Word Games (sub-net)	1137
Miscellaneous mentions of word games	356
Wordle	344
Words with friends	235
Scrabble	135
Wordscapes	123
Crosswords	110
Word search	41
Quordle	34
Word games	33
Words (non-specific)	28
Word trip	26
Word cookies	21
Word find	18
Word Stacks	17

Base: 50-plus Monthly Gamers (n=2,657) Q16. What were your favorite video games that you have played in the last 6 months? Please enter five names of the games in the spaces provided below. You do not have to enter games into all 5 boxes if there were not 5 games you would consider in your favorites.

Top Game Consoles Owned by 50-plus Gamers

Name of gaming device owned
(Gamers ages 50-plus)



Base: 50-plus monthly Gamers (n=2,657)

Q5. Which of the following systems or devices do you currently have in your home? Please think about those systems or devices that are currently being used by at least one member of your household.