



playspan™

# *Games and Virtual Goods* Consumer Spending Report

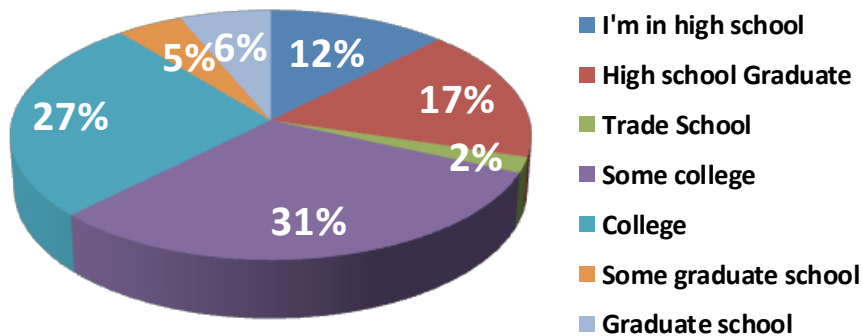
Research conducted by



# Audience Demographic Profile

## VGMarket Audience Panel

### Education



### US General Gamer Population

- 1,006 total respondents between 13 and 65 (inclusive)
- 72% male
- Average respondent age: 25.3
- Average household income: \$68,897



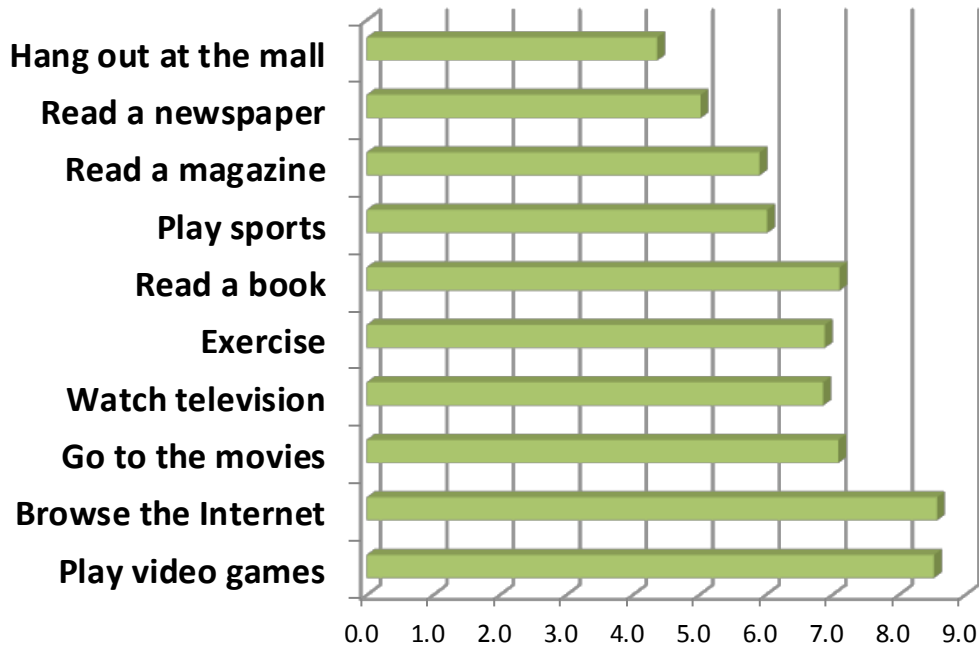
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# Audience Demographic Profile

## VGMarket Audience Panel

### Interest in Types of Activities



What region of the United States do you live in?

<b>East</b>	<b>31%</b>
<b>West</b>	<b>31%</b>
<b>Midwest</b>	<b>21%</b>
<b>South</b>	<b>17%</b>



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The median spent on In-Game Currency and Subscription Codes more than doubled while in-game virtual gifts declined slightly

### Median Spent on Digital Content By Content Type

Content Type	From First Party		From Third Party	
	July 2011	July 2010	July 2011	July 2010
In-Game Currency	<b>\$50</b>	\$31	<b>\$45</b>	\$20
Subscription Codes	<b>\$50</b>	\$20	<b>\$25</b>	\$15
Armor or Equipment*	<b>\$30</b>	\$28	<b>\$20</b>	\$20
Maps/Levels	<b>\$30</b>	\$20	<b>\$30</b>	\$11
Weapons	<b>\$25</b>	\$20	<b>\$20</b>	\$15
Virtual Gifts	<b>\$23</b>	\$30	<b>\$25</b>	\$20
Powerups	<b>\$20</b>	\$20	<b>\$20</b>	\$15
Other	<b>\$30</b>	\$20	<b>\$25</b>	\$10



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As the availability of many more Free2Play and other games with online play has captured more consumer dollars away from casual and social games

### Median Spent on Digital Content By Game Type

Game Type	From First Party		From Third Party	
	July 2011	July 2010	July 2011	July 2010
MMOs	<b>\$70</b>	\$37	<b>\$50</b>	\$35
Free-to-Play Games	<b>\$60</b>	\$20	<b>\$50</b>	\$25
Console Games with Online Play	<b>\$60</b>	\$40	<b>\$50</b>	\$20
PC Games with Online Play	<b>\$50</b>	\$40	<b>\$48</b>	\$10
Casual Games	<b>\$25</b>	\$40	<b>\$23</b>	\$30
Social Networking Games	<b>\$20</b>	\$50	<b>\$20</b>	\$30



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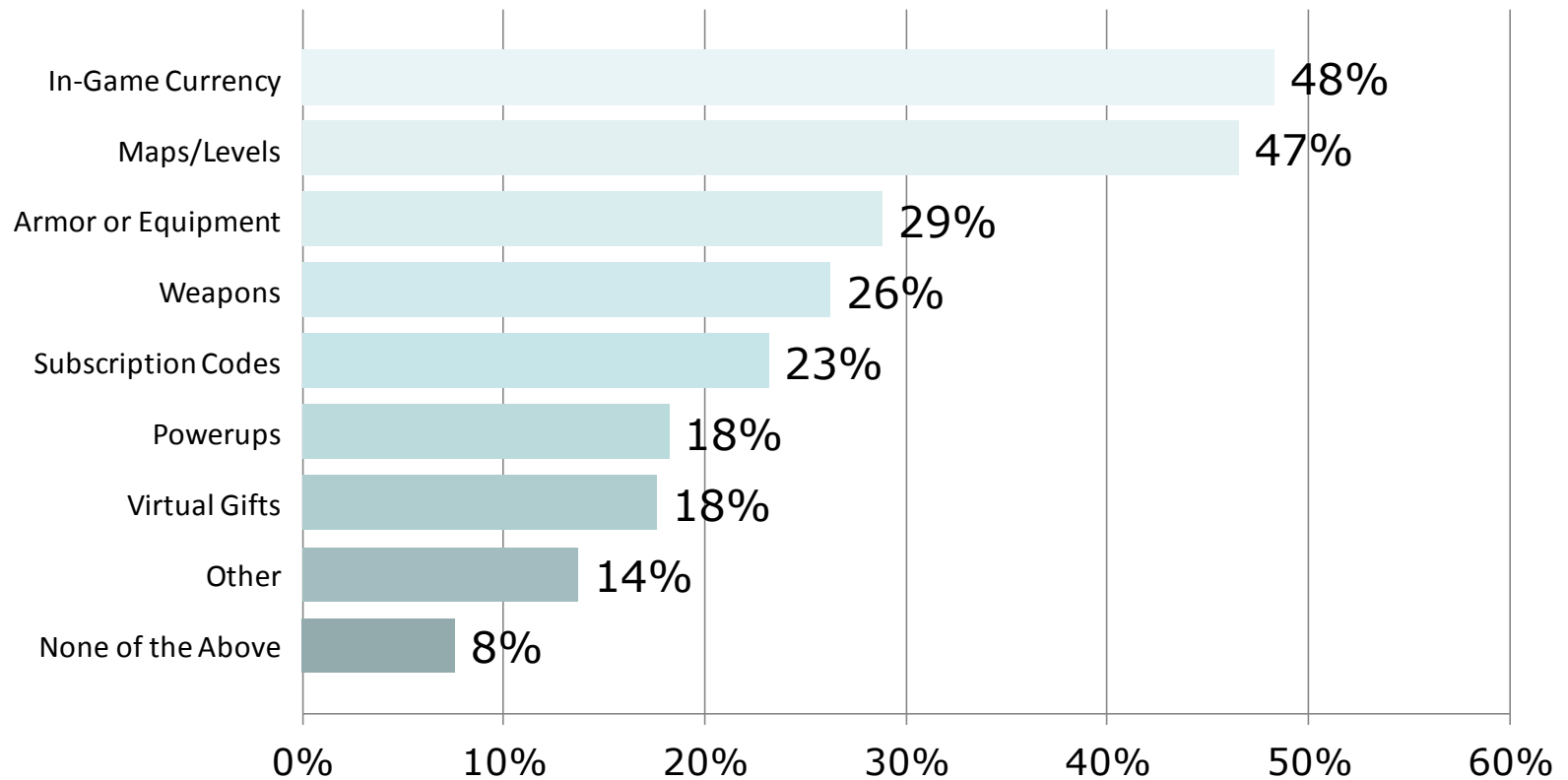
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# Games and Virtual Goods Consumer Spending



More than 47% of the General Gamer Population respondents have purchased In-Game Currency and Maps/Levels in the last 12 months.

In the last 12 months, which of the following types of virtual items or content have you purchased using real-world money?

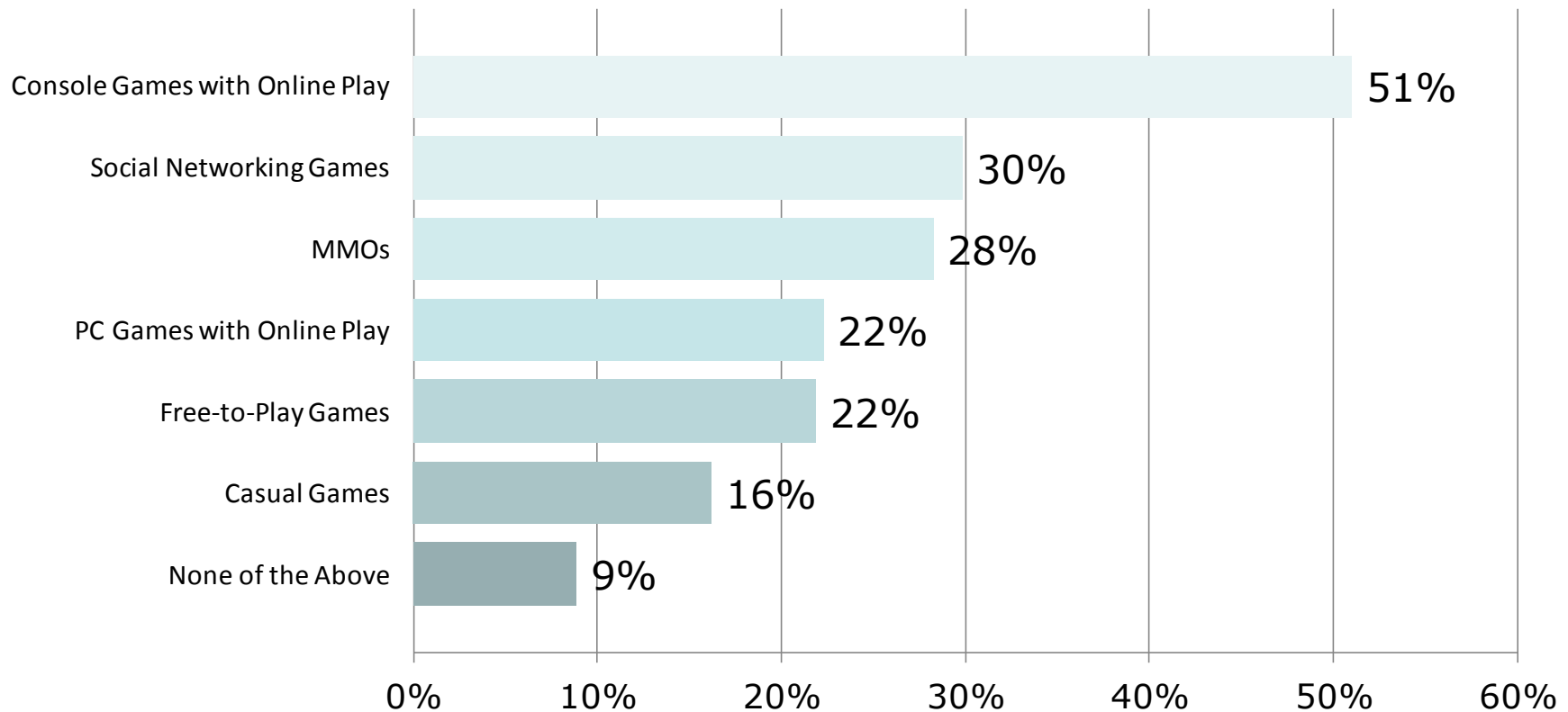


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# While Social Games and MMO's are often associated with virtual goods purchases, over 51% of respondents purchased virtual goods for Console Games with Online Play

In the last 12 months, for which of the following types of online games have you purchased virtual currency, items, or content using real-world money?



## Games & Virtual Goods

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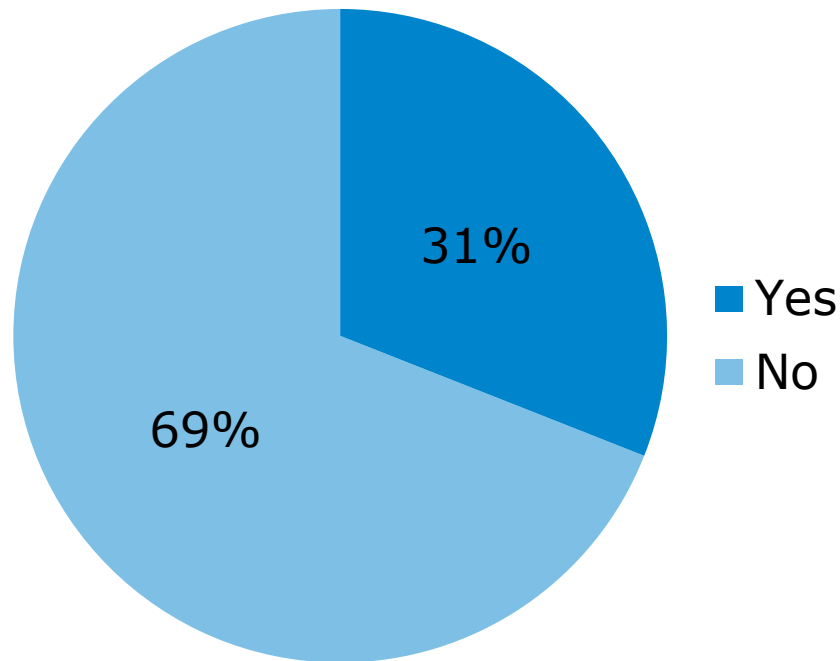
# Spending Habits



One third of the General Gamer Population purchases virtual content.

### 2011 General Gamer Population

In an online game, have you ever used real-world money to purchase virtual content from another player or third-party site?

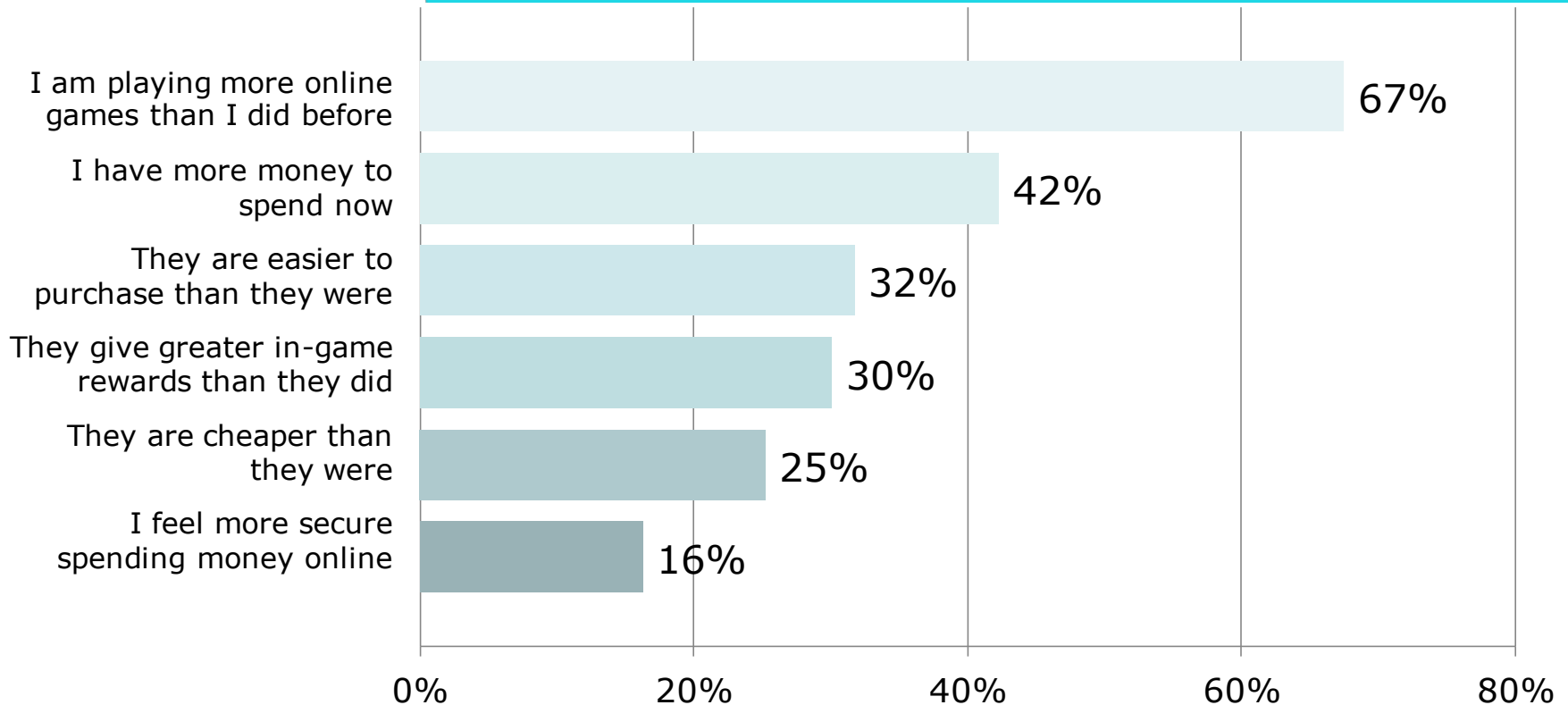


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General Gamer respondents cite “playing more online games” as the top reason for planning to spend more.

### Why do you plan to spend more on virtual goods than last year?

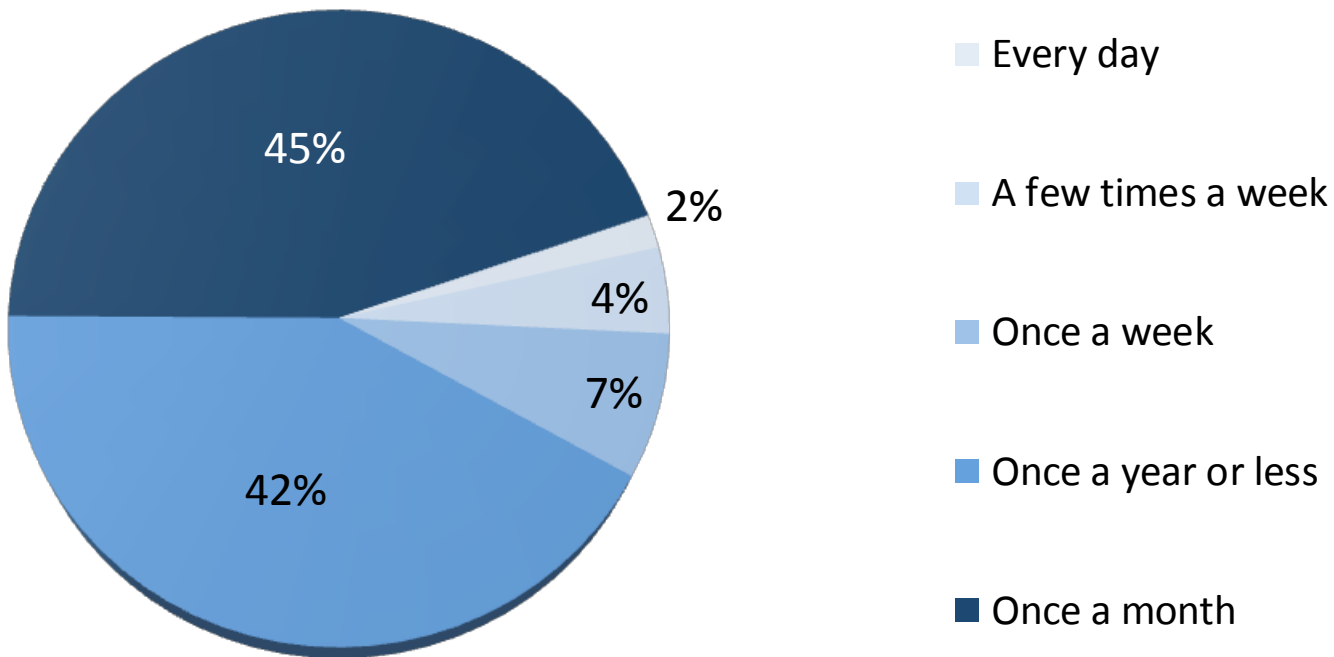


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# 58% of game players that purchase Virtual Goods do so at least once a month

Approximately how often do you purchase virtual items or content with real-world money?

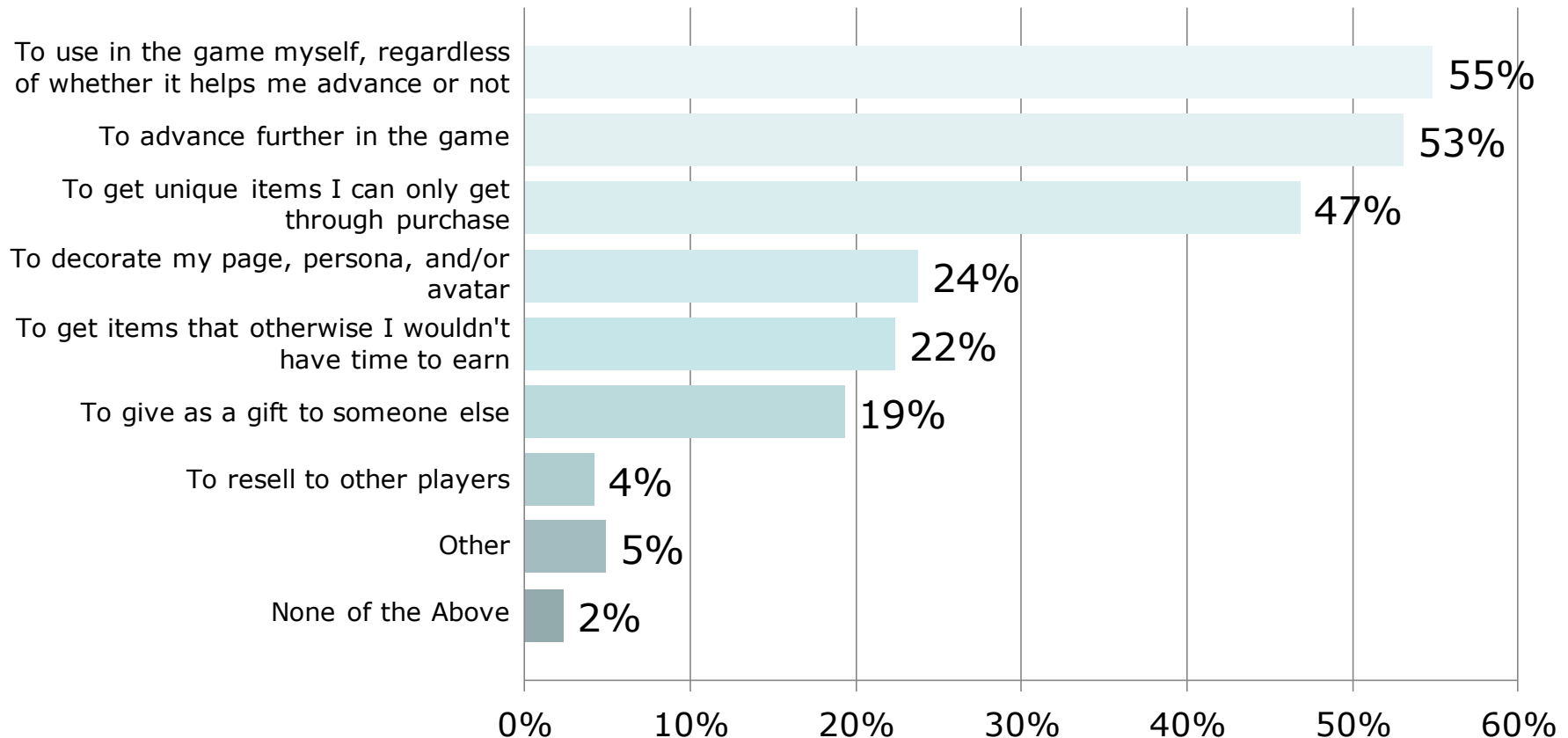


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# Personalization, progress and exclusive items are the main motivators behind Virtual Goods purchases

## What are your reasons for purchasing virtual items or content?



### **Games & Virtual Goods**

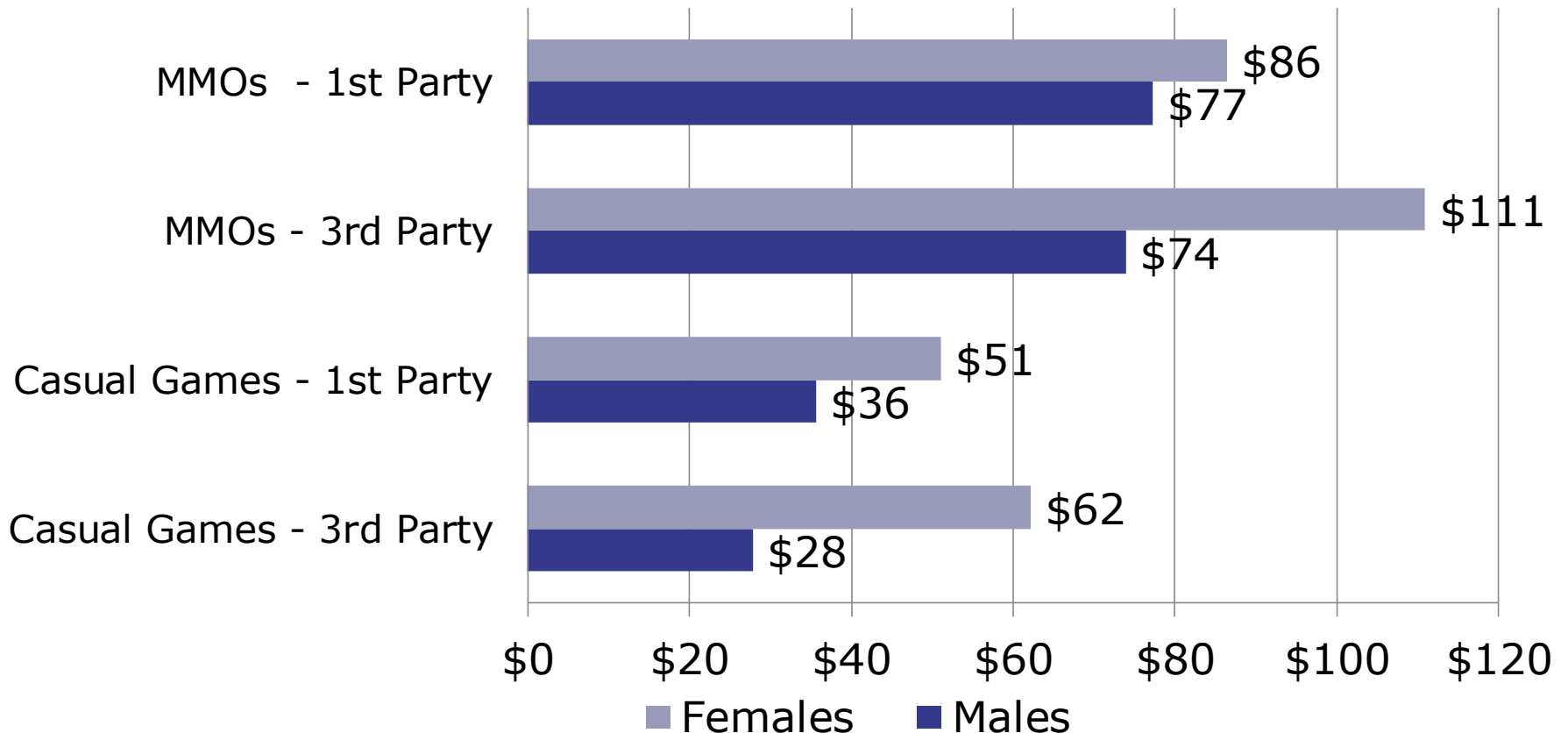
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# Demographic Differences



# Female game players dominate males in virtual goods purchases for both F2P/MMOs and Casual Games

**Average real-world money spent buying virtual content from first-party and third-party in the last 12 months.**



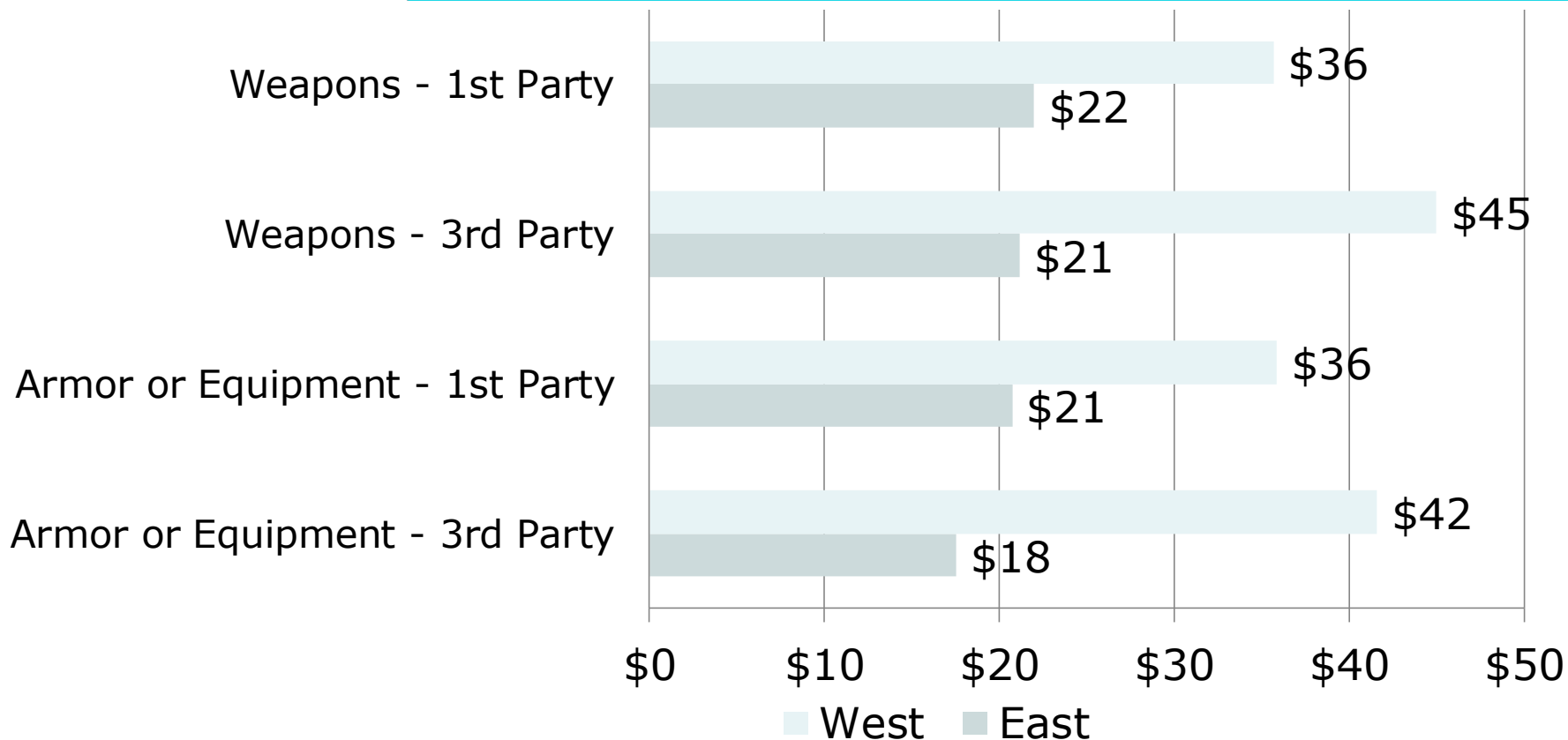
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# Game players from the west coast spend more on both Weapons and Armor compared to those on the east coast

**Average real-world money spent buying virtual content from first-party and third-party in the last 12 months.**



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Game player respondents that play Sports spend much more on MMOs than game player respondents that read Books

**Average real-world money spent buying virtual content from first-party and third-party in the last 12 months.**



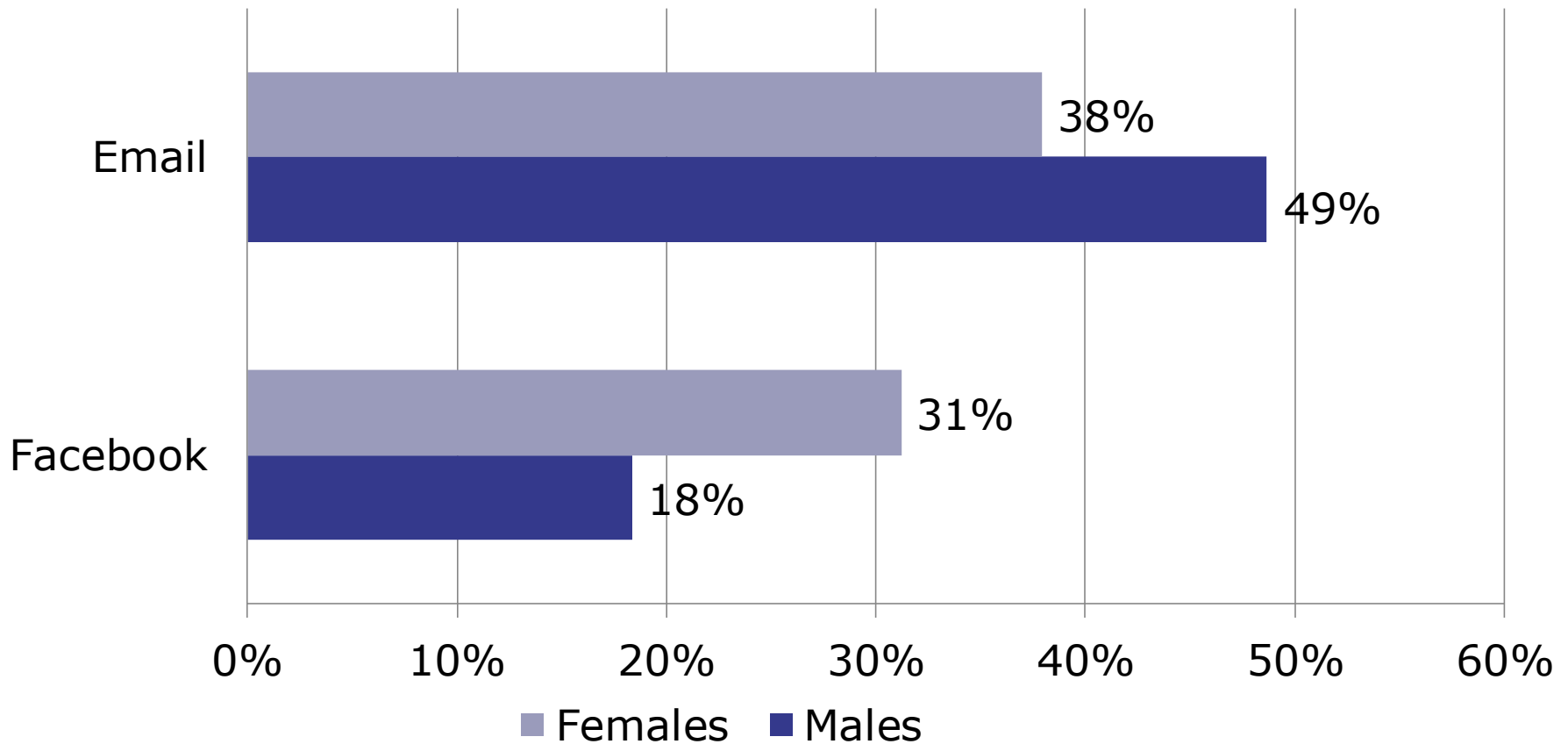
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Male game players are more receptive to email communications than women, while women game players are more accepting of receiving promotions on Facebook than men

**Average real-world money spent buying virtual content from first-party and third-party in the last 12 months.**



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# Objectives and Methodology

## Objectives:

- To assess interest in virtual content in 2011.
- To compare spending on virtual content year over year.
- To identify virtual content of interest and compare spending across different genres.

## Methodology:

- Respondents rate the various methods they have used to pay for virtual goods.
- Respondents then indicate the frequency and types of their purchases and whether they are through first- or third-party channels.
- Respondents indicate how they think their spending habits will change.
- Finally, respondents answer questions regarding their gaming habits.



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# Thank You!

To explore how PlaySpan can power your virtual goods and virtual currencies contact PlaySpan today

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