

# GAMING + MUSIC REPORT





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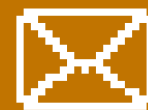
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# START GAME

Gaming has come a long way since its early days when arcades and home computer games were the new on-trend pastime. Nowadays gaming is heavily embedded within the zeitgeist of our times. Whether you are tapping away on the iconic Angry Birds during your commute or spending all weekend playing Call of Duty with friends, millions of people in the U.S. game in some shape or form. And contrary to what most people think, it's not just the younger generations who are gaming away.

Video gaming of today goes far beyond the game itself. As this space continues to evolve, games have become much more elaborate, bending rules on what a video game is. Different entertainment offerings are blended in novel ways to bring unique, immersive experiences to audiences. A game is no longer just a game. While music integration into gaming is nothing new, the level of sophistication and engagement has surpassed what anyone could have imagined when the first Atari came out. Marshmello's debut on Fortnite in 2019 captured nearly 11 million views! And Lil Nax X saw *triple digit growth* in his streaming numbers after his concert on Roblox, which coincided with his single "Holiday" release in 2020. The reason behind these huge successes is not only are they entertaining and fun, but they also successfully tap into gamers' passion point — music.



## INTERESTED IN LEARNING MORE?

We'd love to hear from you. Email us at [data.research@mrcentertainment](mailto:data.research@mrcentertainment).

# LEVEL 1:

## MUSIC AS A PASSION POINT FOR VIDEO GAMERS

While we know that a large majority of the U.S. general population engages with music, video gamers are 13% more likely to do so. With a hankering for all things visual, streaming music videos is the No. 1 music touchpoint among gamers, followed closely behind by audio streaming. Not only are music-listening gamers engaged, they are willing to invest their money in music services. Compared to average music listeners, gamers are 14% more likely to be paying for music streaming services. And their spend doesn't just stop



at the streaming providers. In a typical month, these music enthusiasts are spending 19% more across music categories than the average music listener.

As gamers' engagement with music is high, so are their expectations for how to access music.

The No. 1 factor driving music device selection among gamers is audio quality. They realize that quality comes at a price and they're willing to take out their wallets. Gamers are 24% more likely to own specialized premium headphones, 18% more likely to own smart speakers, and 18% more likely to own smart watches.



**MYTH:** Video gamers are mostly into visual on-screen entertainment.

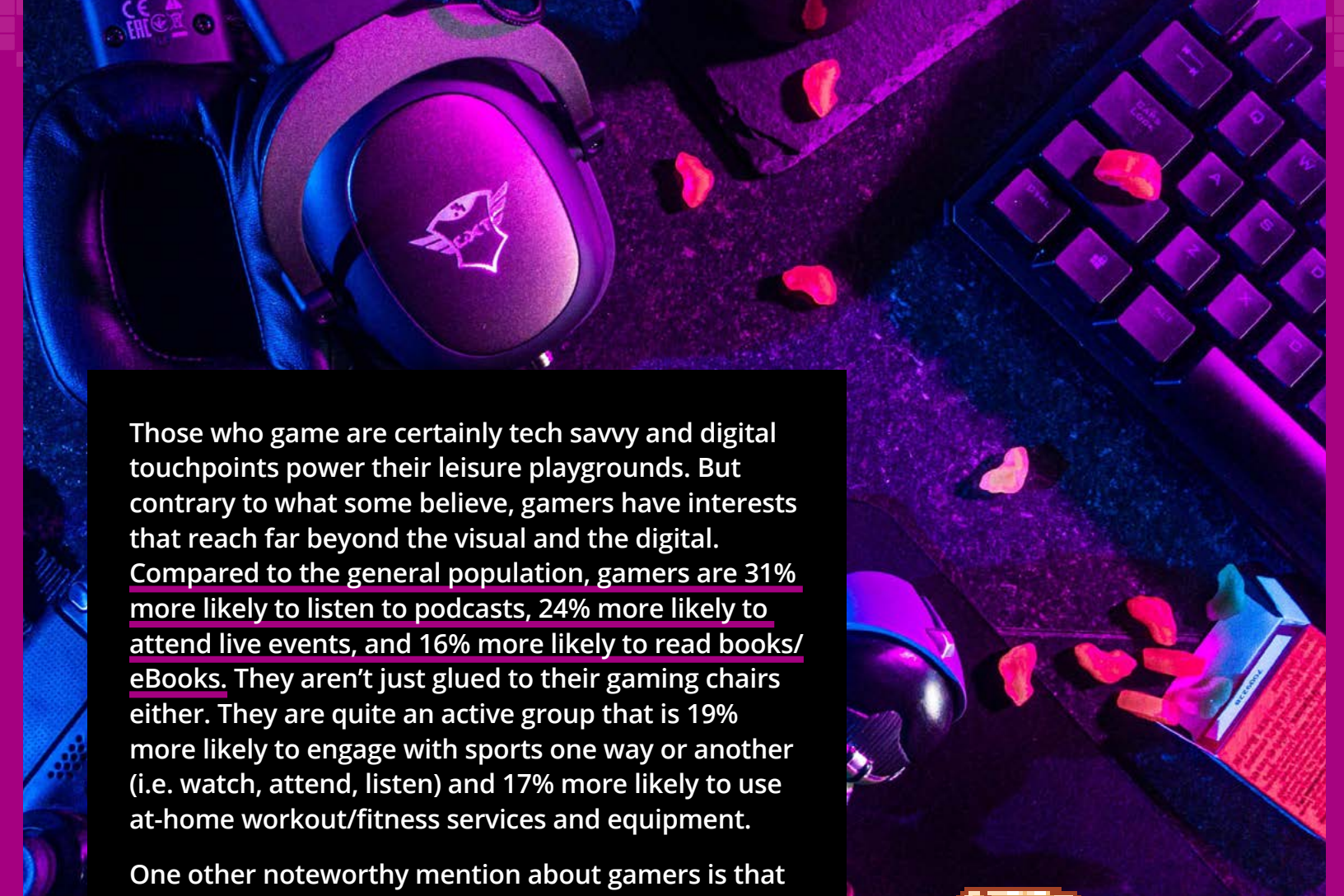
**MYTH BUSTER:** Gamers are multifaceted with a broad range of interests. They are more likely to go to live music events, read books, engage with sports, and listen to podcasts compared to average general population!



LOOT BOX

# 19%

Video gamers who listen to music spend 19% more money on music categories in a typical month than the average music listener.



Those who game are certainly tech savvy and digital touchpoints power their leisure playgrounds. But contrary to what some believe, gamers have interests that reach far beyond the visual and the digital. Compared to the general population, gamers are 31% more likely to listen to podcasts, 24% more likely to attend live events, and 16% more likely to read books/eBooks. They aren't just glued to their gaming chairs either. They are quite an active group that is 19% more likely to engage with sports one way or another (i.e. watch, attend, listen) and 17% more likely to use at-home workout/fitness services and equipment.

One other noteworthy mention about gamers is that they wield social power and leverage social sites to get their message out. Music listening gamers have opinions that carry weight with those around them. Video gamers who engage with music are 22% more likely to say that their friends turn to them for recommendations (new products, music, movies, web series, etc.) and 19% more likely to have influence on friends' lifestyle choices and tastes, compared to average music listeners. Considering that a very large majority of the U.S. population uses social media sites, such as Facebook and Instagram, it's remarkable that gamers are still 14% more likely to use social sites monthly. Plus, gamers using social media are 34% more likely to turn specifically to TikTok compared to the average social media user. Their influence comes not only from their heightened interaction with social sites, but from the receptive eyes and ears of their social circles. If you win with the video gamer, you also win with their friends.



LOOT BOX

22%

Video gamers who listen to music are 22% more likely to agree that their friends turn to them for recommendations (e.g. new products, music, movies, etc.) compared to the average music listener.

# LEVEL 2:

## GEN X "ORIGINAL" GAMERS VS. GEN Z "NEW" GAMERS



Considering that over half of the U.S. general population plays video games in some capacity, gamers can't be pigeonholed into one cohesive group, nor culture. They are diverse and multifaceted not just in terms of their engagement with video games, but more broadly in their interests, habits, and lifestyles. Did you know that over 1/5 of all gamers are ages 55 and above? The "original" gamers, Gen X, make up about 1/4 of all gamers — roughly the same number as the latest "new" generation of gamers, Gen Z.

These two generations are critical to both the gaming and music spaces, driving trends in both arenas. If we consider the average video gamer a music fan, then both Gen Z and Gen X would be considered music super fans. Gen X gamers have the discretionary income to invest — they spend 25% more monthly on music categories than the average gamer. And let's not forget that the average gamer is already spending \$22 dollars more each month on music than the average music listener. That's a lot of cash that Gen X is willing to funnel into music. Gen Z, on



**MYTH:** Video gamers are mostly younger consumers, such as Gen Z.

**MYTH BUSTER:** All generations game. Approximately 50% of gamers are 35 and older, and 22% are in fact ages 55 and above!

**MYTH:** Gamers are mostly into hearing mainstream genres Rap/ Hip-Hop, Rock, and Pop.

**MYTH BUSTER:** While these major genres are certainly popular among gamers, niche genres pop among gamer audiences. For example, did you know that Gen X gamers are more likely to listen to Bollywood, Americana, and World music? And the Gen Z gamers are especially likely to listen to EDM, K-Pop, and New Age?

the other hand, is spending more time. Gen Z gamers who engage with music spend 2 more hours each week listening to music than the average music listener.

When thinking about music-gaming integrations, both generations are grounded in their own music cultures and tastes. Gen Z gamers who listen to music are huge Hip-Hop/Rap fans with this genre being the #1 genre among the group. For Gen X, however, Rock reigns supreme as the top listened-to music genre. Though both generations gravitate toward the most popular genres of today, they are drawn to unique, niche genres that could go a long way in being added to gaming music repertoire. While EDM integrations are likely to resonate exceptionally well with Gen Z who is more likely to tune into EDM than average (56% more likely), a few other genres would add an element of surprise in games. Gen Z gamers are more likely to tune into K-Pop (99% more likely) and New Age (39% more likely) compared to the average music listener. Gen X gamers are more likely to listen to Bollywood (103% more likely), Americana (58% more likely), and World (56% more likely). Unexpected music elements give an opportunity to win big points with consumers who are open to discover new artists as they are uncovering new lands and galaxies.



## LOOT BOX

25%

Gen X gamers who listen to music spend 25% more money on music than the average video gamer.

2+

Gen Z gamers who listen to music spend 2 extra hours each week with music compared to the average music listener.

## WHERE DO THEY HANG OUT?

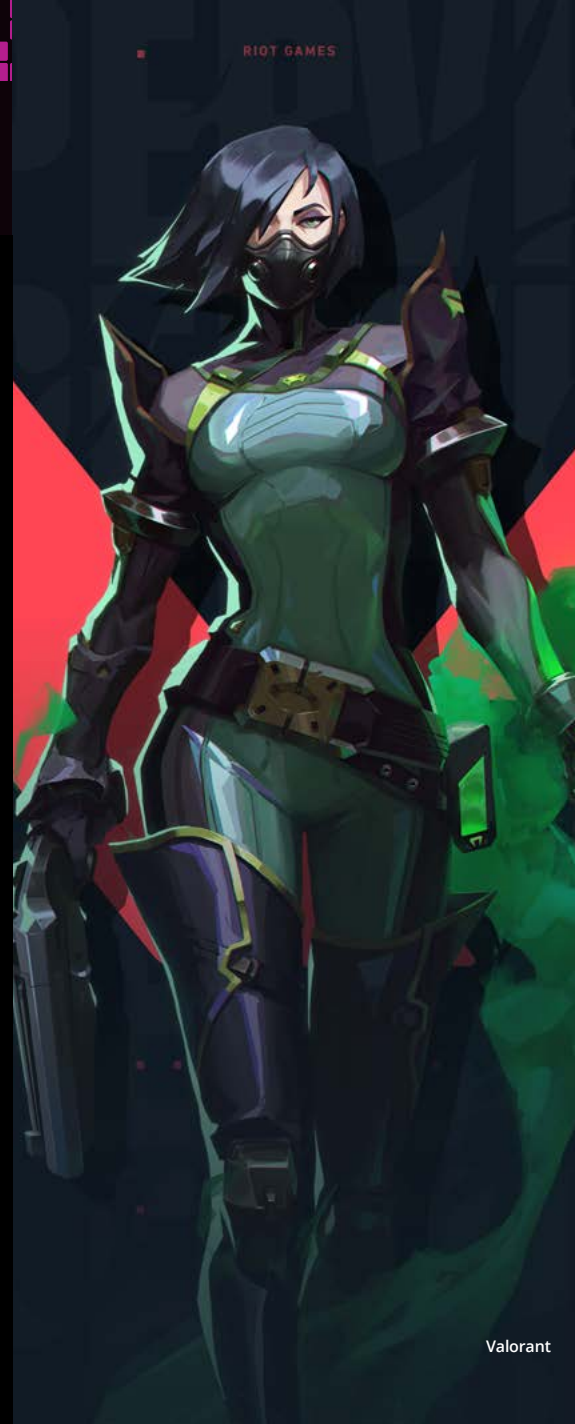
	GEN Z GAMERS	GEN X GAMERS
TOP MUSIC STREAMING PLATFORM — FREE	YouTube	YouTube
TOP MUSIC STREAMING PLATFORM — PREMIUM	Apple Music	Amazon Music
SOCIAL NETWORK SITE USED <i>MOST</i>	TikTok	Facebook

# LEVEL 3:

## NOT ALL GAMERS ARE CREATED EQUAL WHEN IT COMES TO MUSIC

Looking at some of the most popular franchise gamers, who do you think...?

	FRANCHISE GAMERS
Has the highest rate of music listeners?	Fortnite
Spends the most time with music each week?	Call of Duty (Warzone or older release)
Spends the most money on music-related activities monthly?	Dota 2/Dota
Has the highest rate of vinyl records purchasers?	Dota 2/Dota
Spends the most on artist merch in a typical month?	Valorant
Has the highest rate of live music event streaming?	Valorant
Has the highest rate of watching music videos on social video sites monthly (e.g. TikTok)?	Apex Legends



Valorant

## GENRE BREAKDOWN

Which franchise gamers have the highest rate of listening to the following music genres?

MUSIC GENRE	FRANCHISE GAMERS
Rock	Overwatch
Pop/Top 40	Among Us
Rap/Hip-Hop	NBA 2K (or older release)
Country	WatchDogs Legion



MUSIC GENRE	FRANCHISE GAMERS
EDM	Overwatch
Latin	WatchDogs Legion
K-Pop	Dota 2/Dota
R&B	NBA 2K (or older release)



# LEVEL 4: COUNTRY MUSIC LISTENING GAMERS ARE HIGHLY ENGAGED AND A BIT OVERLOOKED



We know that video gamers are very much into the latest mainstream music. But what may come as a surprise is that 40% of music listening gamers tune into the Country genre. That translates into gamers being 174% more likely to listen to Country than EDM! Considering the massive appeal and influence EDM has had on the gaming space, Country could use a little love and leaves an opportunity wide open for Country-game integrations.

Country-listening gamers are quite unique in who they are and how they

choose to connect with music. This group is younger than most expect — over half are Gen Z and Millennials. While Country-listening gamers are 14% more likely to turn to traditional modes of music listening via AM/FM radio, they also stay on top of trends. Vinyl record sales have continued to surge (seeing triple digit growth over the last year), especially among the younger generations as the hot “new” thing. Country-listening



**MYTH:** Video gamers mostly enjoy energetic music with fast beats, like EDM.

**MYTH BUSTER:** Gamers have many music tastes and are 174% more likely to listen to Country than EDM music.



**LOOT BOX**

**60%**

Almost 60% of gamers who listen to Country music use a gaming console.



gamers are jumping on this trend as well — they are 19% more likely to listen to music via vinyl records than average music listeners. Plus, they aren't just the casual, mobile gamers either. They are invested and engaged — almost 60% use a console. Currently, some of the top ranked franchises among Country-listening gamers mirror what's popular in the marketplace — Call of Duty, Minecraft, GTA Online, Mortal Kombat, and Fortnite are among the most popular.

It's clear that music is an integral aspect of Country-listening gamers' leisure time. This group is 29% more likely than the average at-home music listener to play music when engaging with entertainment activities, which reflects the fact that they are 19% more likely to turn to music specifically to set a "fun" mood. Pairing some of their Country music favorites with gaming could be a much-needed and unexpected proposition that would shake up the music mix in gaming — not to mention win over a massive group of underserved gamers who might be feeling a little overlooked.



LOOT BOX

29%

Country music listening gamers are 29% more likely to play music while engaging with entertainment at home than the average music listener.

# LEVEL 5:

## FEMALE GAMERS ARE HIDDEN GEMS

Most assume that a small minority of gamers are female in a space that's traditionally been dominated by their male counterparts. Farther could be from the truth

today — 40% of all gamers are female. And when we look at their entertainment habits and preferences, they are leading the pack and taking their social circles along with them.

When it comes to music engagement, female gamers' engagement rate is almost 10% above that of male gamers. Though it is not entirely surprising that female gamers are listening to some of the most popular genres, what is remarkable is that female gamers are in fact moving some of these genre trends ahead. Female gamers who engage with music outpace the listenership of

male gamers in some of the most popular and fastest growing genres: female gamers are more likely to listen to Pop/Top 40 (34% more likely), R&B (20% more likely), Country (24% more likely), and Latin (28% more likely).

When you consider the audiences' social connections, reaching this group is imperative. Female gamers are 10% more likely than male gamers to be using social



**MYTH:** Males still dominate the gaming space.

**MYTH BUSTER:** While gamers are more likely to be male, females make up 40% of all gamers!



LOOT BOX

# 34%

Female gamers who engage with music are 34% more likely to listen to Pop/Top 40, 28% more likely to listen to Latin, 24% more likely to listen to Country, and 20% more likely to listen to R&B than male gamers.

media sites monthly and rely on a mix of platforms. Compared to male counterparts, female gamers are over 20% more likely to use Facebook, Instagram, Snapchat, and TikTok. Their heightened use of social sites makes this outlet particularly relevant for their music interests. For example, they are more likely to use and discover new music and artists on social short video clip sites (e.g. TikTok) compared to male gamers.

## BRANDS

Considering the high influence potential of female gamers, brands should cater to this group of consumers. Since they are connected to others, they have strong word-of-mouth influence. Music-gaming integrations make sense for brands that want to appeal to these influencers. Among female gamers, the top brand activations to gain most favorability include supporting a charity or community event with a music artist (67%), having giveaways for artist merch and/or music (60%), and offering giveaways for live music events (58%).



Top brand activations to gain favorability among female gamers:

#1

Supporting a charity or community event with a music artist (67%)

#2

Having giveaways for artist merch and/or music (60%)

#3

Offering giveaways for live music events (58%)

## CONSUMPTION

Compared to the average U.S. consumer, female gamers are +% more likely to purchase:



+75%  
COSMETICS



+40%  
SKIN CARE



+24%  
HAIR CARE



+23%  
PERSONAL CARE



+20%  
USE FOOD DELIVERY



+17%  
LUXURY BEAUTY



+17%  
NON-ALCOHOLIC BEVERAGES

Compared to 21+ alcoholic beverage buyers, female 21+ gamers are +% more likely to purchase...

HARD SELTZER... +42%    TEQUILA... +24%    WHITE WINE... +23%    ROSE WINE... +21%



Travis Scott in Fortnite  
NEILSON BARNARD/GETTY IMAGES

# LEVEL 6: THE NEW FRONTIER: LIVE MUSIC INTEGRATIONS

Most of us have heard about Travis Scott's and Lil Nas X's epic performances on Fortnite and Roblox, respectively. These highly successful live streamed performances coincided with both artists' single releases, packing an extra punch. Gamers returned in kind. Post-performance, Lil Nas X's on-demand streams surged in just one week by 155%. Travis Scott's on-demand streams grew by 60M over just the two weeks following his Fortnite show. And the impact resonated into purchasing as well — Scott's digital album sales went up by 299% and physical album sales by 41%.



LOOT BOX

25%

Almost 1/4 of music listening gamers discover new songs and artists through video games.

When we look at gaming integrations that aren't paired with new releases, the story is very similar even though the magnitude may not be as steep. Steve Aoki's Fortnite event bumped his total album sales by 75%, pushing on-demand streaming up by 17% post appearance. Roblox's Royal Blood integration drove Royal Blood's video on-demand streams up by 52%. These double digit figures are quite impressive considering we're talking about short one-night performances on very specific gaming franchises.

Gamers are turning to their favorite games to discover new artists as well. This is evidenced by the fact that 23% of all music listening gamers discover new songs and artists through games. That rate is even higher at 34% among Gen Z gamers. Video games offer artists a platform where audiences are already in a creative discovery mindset, opening up doors for less obvious artist appearances.

Take Ariana Grande's Fortnite virtual appearance. Grande's integration was highly interactive and provided an opportunity to reach a slightly different audience than traditionally makes up her core fanbase. While she may not have been the most surprising artist to join in on the fun, this did have the potential to grow awareness and listenership among a less reached audience. If we take emerging artists from the less represented genres, the discovery component is likely to surge. Considering consumers enjoy the new and unexpected, music has the potential to continue to revolutionize and elevate the gaming space.



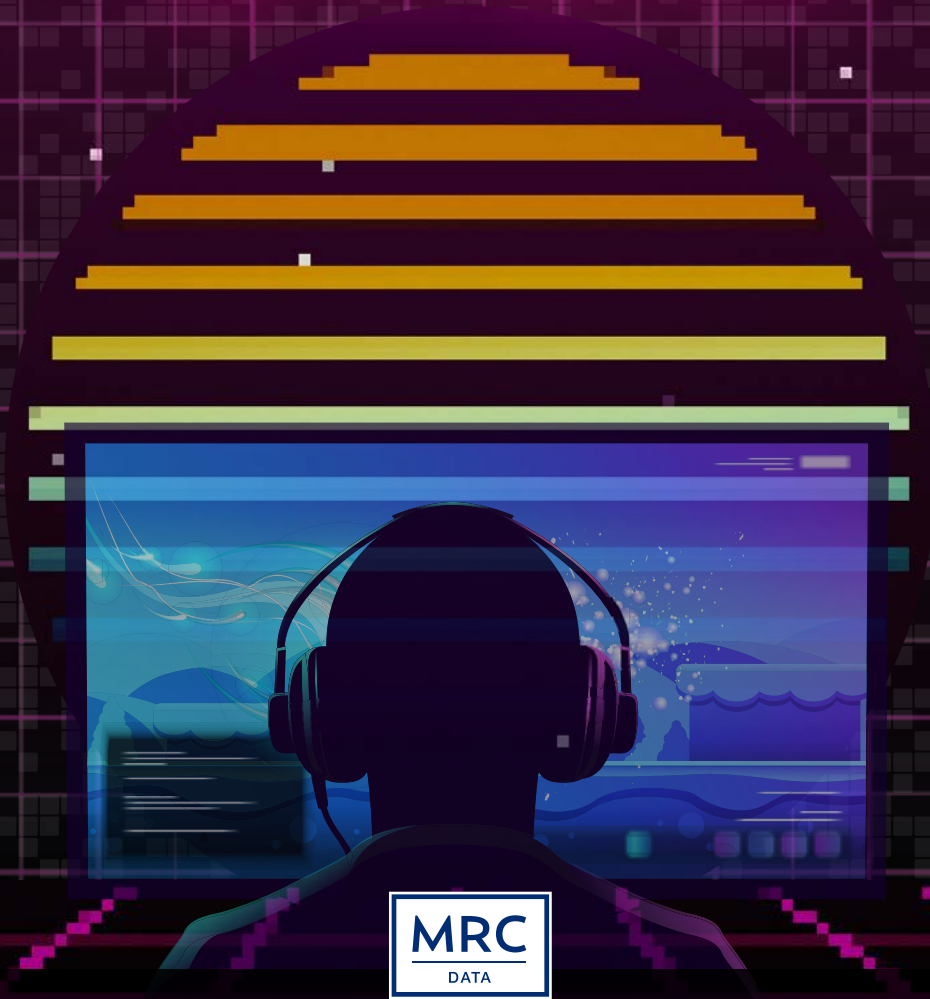
Ariana Grande / Fortnite



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# GAME OVER



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