

The Tenth Annual Game Design Think Tank Project Horseshoe 2015



Group Report: Designing Games for the Growing 35+ Market

Participants: *A.K.A. "Life-long Play"*

Aaron Steelman, Bungie

Nikki Graham, DeVry University

Nick Yee, Quantic Foundry

Ted Brown, Oregonik

Facilitator: Kyle Brink, Viggle

Problem Statement

New data show that player motivations have predictably consistent trends by age. The same dataset also indicates a shift in game preferences for both men and women.

Report Goal: This report explores how game designers can use these data findings to build appropriate and successful games for the growing age 35+ demographic.

Report Fundamentals:

- **The home video game market is 38-40 years old**, as Home Pong systems released in 1975, while the Apple II computer and Atari 2600 console arrived in 1977 [1].
- **The oldest lifetime game players are turning 60** (players who began gaming before the age of 18), as Pong cabinets arrived in 1972 [1].
- **Today, 97% of children play video games** [6], meaning the population of lifetime players in every age category is slated to expand significantly year-over-year.
- **44% of gamers are over 35**. For males, the average gamer age is 35, and for females, the average gamer age is 43 [1].

Report Focus:

- While there is likely a correlation between player preferences and life stages (child, adolescent, young adult, parent, empty nest, retired, etc.), this report focuses on age demarcations because the data are available.
- The overall focus of this report is on players 35 and over:
 - At age 35, player motivation differences between the genders begin to be eclipsed by the effects of age (according to the data compiled by Quantic Foundry).

Age 35 is the low-end limit of a traditional target-marketing demographic (that is, generic marketing brackets for all products, typically applied to games) [10].

Solution Statement

The data show a marked age-related change in player motivations and preferences. Examining this more deeply, we find several specific areas where this emerges: pacing, interruptibility, cooperative play, and

context. Armed with this analysis, there are several ways in which innovation can be employed to reduce potential player erosion and increase player recruitment in the 35+ market.

The Data

Much of the data used to formulate the content of this report originates from Quantic Foundry's Gamer Motivation Profile. Over 140,000 gamers provided data on their gameplay motivations as well as their favorite games. While the dataset focuses on core PC/console gamers, the age and gender trends are likely still helpful in providing insight for gaming preferences in general.

The motivation model that Quantic Foundry developed consists of 6 clusters of motivations, covering a broad range of gameplay preferences (such as the appeal of fast-paced action, collaboration, and exploration).

					
Action "Boom!"	Social "Let's Play Together"	Mastery "Let Me Think"	Achievement "I Want More"	Immersion "Once Upon a Time"	Creativity "What If?"
Destruction Guns, Explosives, Chaos, Mayhem.	Competition Duels, Matches, High on Ranking.	Challenge Practice, High Difficulty, Challenges.	Completion Get All Collectibles, Complete All Missions.	Fantasy Being someone else, somewhere else.	Design Expression, Customization.
Excitement Fast-Paced, Action, Surprises, Thrills.	Community Being on Team, Chatting, Interacting.	Strategy Thinking Ahead, Making Decisions.	Power Powerful Character, Powerful Equipment.	Story Elaborate plots, Interesting characters.	Discovery Explore, Tinker, Experiment.

Game Motivations by Age

Changes in motivation varied between men and women. All motivation changes were **decreases**.

Male Player Motivation Declines:

1. Competition (duels / matches) decreases the most with age,
2. followed by Excitement (fast-paced / intense),
3. Challenge (difficult missions & mastery),
4. and Community (interaction & collaboration).

Female Player Motivation Declines:

1. Excitement decreases the most with age,
2. followed by Story (narrative / character stories).

Male		Female	
Motivation	Age	Motivation	Age
Competition	-.305	Excitement	-.257
Excitement	-.286	Story	-.204
Challenge	-.245		
Community	-.197		

Stable Motivations Across Age: Strategy (thinking / planning ahead), Completion (finishing / collection), and Discovery (tinkering / exploration). For women, Community also remained stable.

Male		Female	
Motivation	Age	Motivation	Age
Strategy	-.05	Completion	-.01
Completion	-.06	Community	-.04
Discovery	-.07	Strategy	-.03
		Discovery	-.06

The data showed **no motivations that increase with age** (i.e., positive correlations). This finding could be interpreted in multiple ways:

- The keying of the motivations is somewhat arbitrary; for example, low Excitement could have been labeled high Serenity. Thus, it's equally justifiable to say that 35+ players prefer calmer gameplay and that this motivation increases with age.
- Motivations are keyed in the way they are traditionally understood in the gaming market, and thus another interpretation is that as gamers age, the appeal of traditional game mechanics declines as a whole.

Popular Games by Age

The Quantic Foundry dataset also allowed us to identify the games that are disproportionately popular among different age and gender groups. As a baseline, we first identified the games popular among gamers 35 and under. Among men, competitive games and action games (such as Counter-Strike, DoTA, and Dark Souls) are popular. Among women, life simulation games (such as Harvest Moon and The Sims) and narrative puzzles (Professor Layton and Phoenix Wright) are popular.

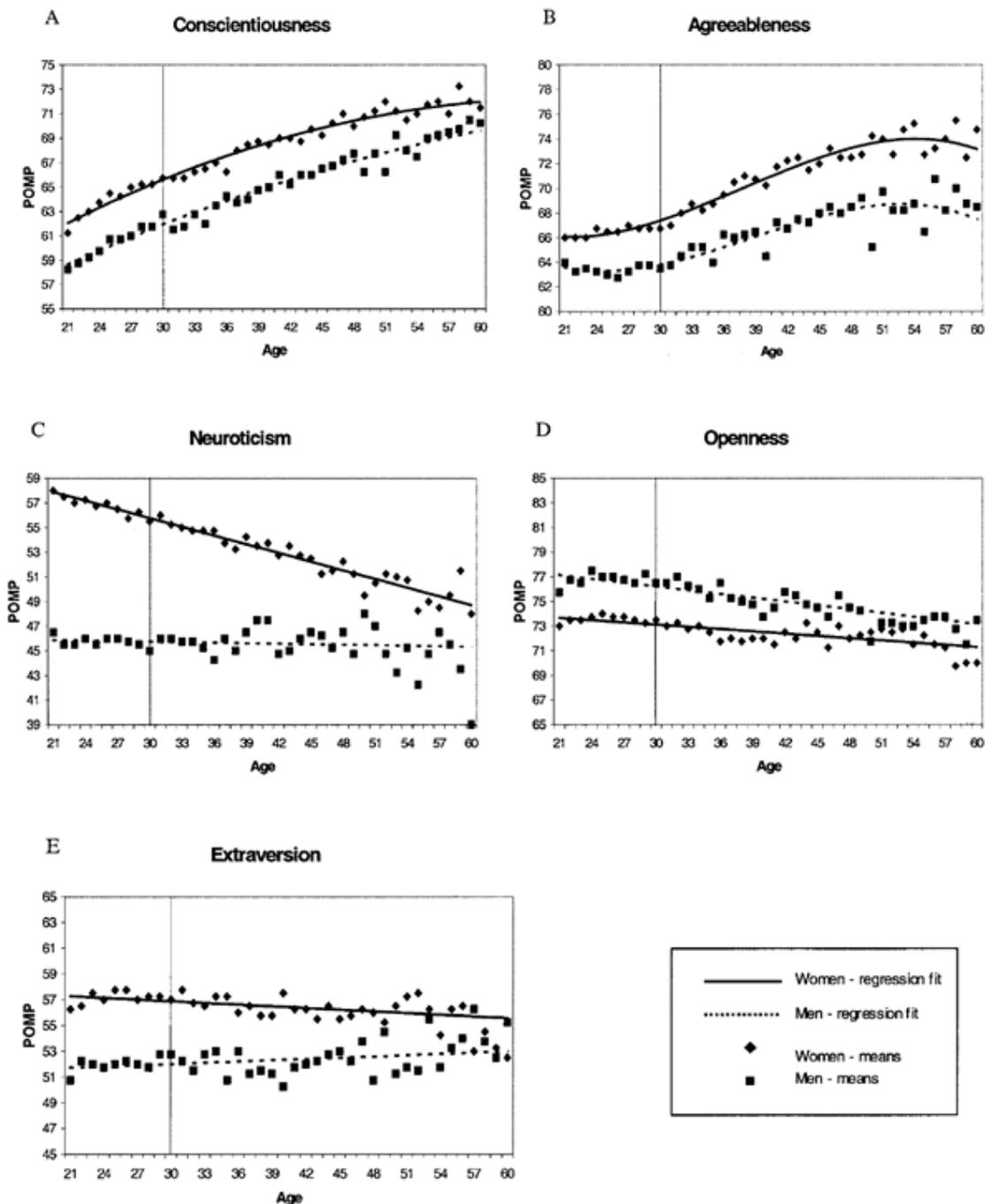
We then tabulated the games for gamers older than 35. Among men, the list shifted to mostly 4X strategy games (such as Master of Orion and Civilization) and MMOs (City of Heroes, EverQuest), with the interesting exception of World of Tanks. Among women, the list shifted to a combination of online games (Second Life, EverQuest) and casual games (Candy Crush, Plants vs. Zombies).

And finally for gamers older than 45, we found that the list for men overlaps a lot with the previous list, with the MMO and 4X games carrying over, and the interesting addition of a few action games (Far Cry, and Thief). Among women, again there is a good deal of overlap with the addition of digital versions of traditional games (Scrabble, Sudoku) as well as social online games (like Farmville and Glitch).

Personality Trends by Age (Big 5 Personality Factors)

The Big 5 personality factors is a widely-adopted personality model and assessment tool in personality psychology research. It has been shown to be reliable and cross-culturally valid. The model identifies 5 key personality factors that account for a large amount of interpersonal differences in personality.

Studies have also explored how personality changes with age [12]. Extraversion (social, energetic, assertive) and Openness to Experience (imaginative, artistic, open to change) are largely stable across age. Conscientiousness (organized, disciplined, planning) and Agreeableness (sympathetic, trusting, kind) increase with age. And finally, Neuroticism decreases with age among women and is stable across age among men.



What Does it Mean?

Gamers over 35 prefer games with slower action

Male gamers younger than 35 overwhelmingly prefer twitch action games with titles like Counter-Strike and DoTA topping their list of preferred titles. For female gamers under 35, the top titles are primarily narrative-focused, real-time, and/or puzzle-focused games like Professor Layton, Harvest Moon, and The Sims.

The game preferences of over-35 gamers seem to indicate a reduced interest in fast-paced gaming, trending instead toward turn-based games and social games where individual time pressure is lower. For women over 35, puzzle games like Candy Crush and Plants vs. Zombies top the list along with social games like Second Life. For men the list is dominated by turn-based strategy games such as Master of

Orion and Civilization along with MMOs like EverQuest or City of Heroes. Even World of Tanks may be seen as a transitional game for this group, bridging the gap between twitch- and turn-based gaming with its focus split between traditional FPS and team-based positional gameplay.

Gamers over 35 prefer games they can pause or stop on demand

Whether it's due to the changing time constraints under which they game or merely changing tastes, gamers of both genders over 35 seem to prefer games that are more interruptible (or in which gameplay is segmented in to small, predictably-timed chunks). For male gamers over 35, turn-based and MMO games may offer them the opportunity to step away at a moment's notice without losing significant in-game progress. Similarly, female gamers over 35 appear to prefer games with no penalty for short play sessions; the puzzlers and social games that top their list offer easy off-ramps for busy gamers.

In contrast, gamers of both genders who are under 35 tend to prefer games with longer and/or indefinite play sessions. Titles like Harvest Moon and The Sims can be played for hours on end with no obvious stopping point and are popular with younger female gamers. Male gamers in this segment show a tolerance for very long, uninterrupted play sessions with their dedication to games like DoTA and Dark Souls.

Gamers over 35 prefer more cooperative play

Across genders, gamers over 35 are more interested in cooperative/collaborative experiences than in dominance. Male gamers in this age group overwhelmingly prefer the cooperative gameplay experiences found in MMOs like EverQuest, where team mechanics often trump individual skill requirements. The surprising popularity of World of Tanks for these men may owe as much to its focus on teamplay over lone-wolf mechanics as it does to its slower pace. Female gamers over 35 also heavily favor cooperative and social titles; Second Life and Glitch rank among their favorite games. Even asynchronous cooperative play seems to satisfy this urge, evidenced by the popularity of Farmville among these women.

By contrast, younger gamers tend to prefer either solo play (evidenced in young female gamers' dedication to the Professor Layton titles) or competitive experiences where twitch skill is as or more important than teamplay (such as CS:GO which tops the list of preferred titles for men in this segment).

This difference may be partially explained by the documented increase in both conscientiousness and agreeableness that takes place in both men and women after age 35.

Context still matters

While game preferences are starkly divided along gender lines early in life, once gamers age out of the under-35 demographic their tastes seem to converge. It is notable, though, that despite the strong correlations in genre and mechanics across genders at this age, there are still significant differences in their contextual preferences. For instance, both men and women of this age prefer MMOs, but not the *same* MMOs. Men over 35 overwhelmingly prefer Sci-Fi, fantasy, and military contexts. Women of the same age seem to gravitate toward fantasy, real-world, or acontextual puzzle games.

What do we do?

In order to serve the evolving desires of game players over 35, the following innovation opportunities present themselves:

- **Preempt the decline in game engagement** among player population as they age (presaged by the decline in game-related motivations seen in the Quantic Foundry survey).

- **Expand the market** in 35+ age brackets - beyond those served by existing games.

These innovations will be most effective when considered in the historical context of video game market penetration. Current game players in the 35+ age range are a heterogeneous mix of lifelong players and adult adopters. Later cohorts entering this age range will consist of ever-increasing numbers of lifelong players.

We determined a number of game elements that could serve the tastes of the 35+ population, based on life experiences and in demonstrated play preferences in current games.

Play Preferences

In the Quantic Foundry survey, players aged 35+ demonstrated increased interest in the OCEAN characteristics of Affinity and Conscientiousness. This suggests that innovation in the following game elements could be engaging and fun for this group.

- **Co-operative play**
- **Asynchronous asymmetrical play**, where a strategic player can directly assist an action player
- **Synchronous asymmetrical play**, where a parent can play with a child

Relatable Experiences

The adult experience is not broadly or deeply represented in the current game marketplace. This represents a potential opportunity for innovation that could prove engaging for the 35+ audience. Some ideas in this regard:

- **Legacy play**, where an avatar can pass something of value on to a successor
- **Altruistic play**, where one avatar assists, protects, or cares for another
- **“Apples for Oranges” exchanges**, where one path of significant potential is exchanged for another that, while not quantifiably “better” or “worse,” is different and valuable.

PDT Stages

Some of these ideas are informed by the work of Eric Erickson. In his Psychosocial Development Theory, there are crises which, if unaddressed, lead to psychic baggage that leads to a less fulfilling life. Two stages in the PDT model seemed relevant to our discussion here.

Generativity vs Stagnation

During middle adulthood, ages 40 to 65, we establish careers, relationships, families, and a sense of being part of the bigger picture. Failing to achieve these objectives leads to stagnation and being unproductive, while success leads to the virtues of generosity and care.

Ego Integrity vs Despair

Over 65, we tend to slow down and explore life as a retired person. It is a time to contemplate accomplishments, and is a crucial test. A life seen as unproductive or unaccomplished can lead to dissatisfaction, despair, and depression. But a life seen as well-lived leads to “a sense of integrity strong enough to withstand physical disintegration.”

Relevant Questions

Answers to the following questions would assist in guiding game innovation for the 35+ market.

- What are game preferences of players aged 35+ who first played video games before 18?
- What are game preferences of players aged 35+ who first played video games at 18+?

- Is there a correlation in game context preferences with the age of play adoption, and if so, what does it tell us about where innovation will be most engaging?

Endnote: Brainstorming Topics of Value

The following topics came up in discussion and are, we believe, relevant to designers working to satisfy the 35+ market in games.

Altruistic tendencies increase over time.

As sense of mortality increases, desire for immortality via legacy increases. This results in a stronger desire to nurture and “give back” in altruistic manners.

The need for social interaction becomes a health imperative as age increases.

Time spent socializing and communicating is consistent across all age brackets [2], but the *need* for socializing becomes a health imperative as age increases [3] [8].

Predictable rewards for persistent games matter more as age increases.

An impending sense of “end of life” (for later age groups) results in less patience for time investments that have no guaranteed result. As an example, we compared Destiny and World of Tanks. Destiny has a randomized loot system, meaning X hours of play can have wildly different results. Whereas World of Tanks has a reward system which is predictable in nature. World of Tanks is consistently popular for males aged 35+ and 45+. Destiny is not.

Preferred reward systems for time investment are not necessarily linked to age

One “common sense” assertion we made -- and that turns out to be false -- was that people past middle age have an acute sense of the value of time, and therefore prefer predictable reward systems (e.g. resources awarded after game events). As an example, we compared Destiny (which has a random system) and World of Tanks (which has a predictable system). WoT is a consistently popular game for males 35+ and 45+, while Destiny is not. However, on further reflection, casino games are popular with older players (as per Meretzky at GSN), therefore it makes more sense to say that the fast-paced nature of Destiny is what makes it less popular.

Games will always be a good way to fill some time

Some games are ephemeral in nature, and have little “meaning” (in the literary sense), but still allow people to maximize their enjoyment for time remaining in the day. This includes Hidden Object games and games with pseudo-social interaction, such as Invest and Express games on Facebook (e.g. FarmVille).

What is the Mentor’s Journey?

The Hero’s Journey can describe the narrative arc of many games for ages 13-35. However, past a certain age, this sense of wish fulfillment and empowerment is seen as juvenile instead of ideal. The Hero’s Journey emerged from common myths and fables, many of which deal with educating children about life skills through allegory. However, cursory research did not reveal a body of work related to “fables for parents” (and older folks). Are there fables that can teach lessons to this age bracket? From these fables, does a centralized meta-narrative emerge? And if all of this exists, could it inform new themes in traditional structures, such as RPGs?

One method is to look at the appearance of Mentors and Parent Figures in heroic journeys. They can serve as symbolic ciphers for larger social constructs, but in cases where they represent older people with metaphorical keys (e.g. wisdom, tools, etc), it makes sense to explore their point of view. Ideally, if made compelling, it would resonate with older gamers.

Games can provide key social interactions not always available in real-life

As people grow older and geographically disparate, online communication serves a critical social need that can't be feasibly met in the real world. Games such as Words with Friends allow people to be asynchronously engaged with multiple people at the same time, while MMOs provide a context where talking with others is promoted and encouraged.

Online social games may be more important for men

It's anecdotally stated that it's rare for men to meet for the sake of casual conversation. However, shared activities (e.g. televised games, sports, hunting) provide a context where social interaction is acceptable. For those who are at risk of isolation and depression, and unable (or unwilling) to meet in real space with friends and family, online games can serve this role. Note that this implies a symmetrical online presence. We believe that asymmetrical social interaction does not fulfill this need.

Multi-generational gaming is on the horizon

There is anecdotal evidence that parents play MMOs with their children. Not only does this mean "traditions" can be passed on, it also provides a way for players to participate in the same activity using roles they are comfortable with (such as a child who follows their parent and simply heals them all the time). We've shown that interest in game structures changes over time (e.g. action titles fall away in favor of strategy), and the concept of true "multi-generational" titles that allow for different interaction methodologies in the same milieu have the capacity to truly transform multi-generational interactions.

There is a deep-seated need to be acknowledged

Isolation is a self-reinforcing negative feedback loop that greatly increases risk of death [10], and it appears to be a greater risk as people grow older. Through online games, people unable (or unwilling) to circulate in society can have their presence (and contributions) acknowledged.

Games can serve as a substitute for needs unmet in the real world... and these needs change over time

An example is justice, a desire for morally and ethically proper outcomes for work that is done. If this need is unmet in the real world, games can provide a sort of therapeutic treatment. A good question to ask is: does our older age segment have unmet needs that younger gamers simply can't understand?

Anecdotal Information

"I am 61 yrs old and she is 59, we never played video games ever until we saw a demo of Halo Reach and my wife thought it might be interesting to try , I was shocked but said sure, what the hell. It took this game to get us to do "on line" play and love it! It's a bit strange to be matched up with kids but hold my own with their talents. My style is to methodically go through a strike while most other members of the team rip through it like a run away train. :) I see an advantage to be on the offense but still enjoy feeling a bit mortal." [11]

Reference Material

[1] Essential Facts About the Computer and Video Game Industry

<http://www.theesa.com/wp-content/uploads/2015/04/ESA-Essential-Facts-2015.pdf>

[2] Time spent in leisure activities in 2014, by gender, age, and educational attainment

<http://www.bls.gov/opub/ted/2015/time-spent-in-leisure-activities-...-educational-attainment.htm>

[3] Socially Active Older Adults Have Slower Rates of Health Declines

<http://www.cfah.org/hbns/2011/socially-active-older-adults-have-slower-rates-of-health-declines>

[4] Older adults as 21st century game designers

http://tcjg.weebly.com/uploads/9/3/8/5/9385844/marston_tcgj_11_whitsun_2012.pdf

[5] 16 trends that will define the future of video games

<http://www.theguardian.com/technology/2015/jul/23/16-trends-that-will-change-...-industry>

[6] Survey: Nearly every American kid plays video games

<http://abcnews.go.com/Technology/story?id=5817835&page=1>

[7] Senior Gaming Trends

http://www.slate.com/blogs/future_tense/2013/03/06/research_shows_surprising_...games.html

[8] Video Game Benefits: Study Says Beneficial in Aging

<http://www.parentherald.com/articles/9903/20150910/video-game-benefits-...-ageing.htm>

[9] Being Alone vs. Being Lonely: The Psychological Effects Of Social Isolation

<http://www.medicaldaily.com/pulse/being-alone-vs-being-lonely-...-344050>

[10] Marketing Age Demographics

<http://marketingartfully.com/2012/12/13/customer-demographics-age-...-advertising/>

[11] Average Age of a Destiny Player

<http://www.destinyoverwatch.com/threads/average-age-of-a-destiny-player.1134/>

[12] Personality Changes with Age

<http://pages.uoregon.edu/sanjay/pubs/b5development.pdf>

[13] Additional Publication List

<http://www.hannahmarston.co.uk/publications.html>