

MARKET RESEARCH
THE STATE OF
ONLINE GAMING - 2018

This report is the latest in Limelight Networks' series of surveys on consumer perceptions and behaviors online



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OVERVIEW

The *State of Online Gaming 2018* market research report highlights the latest findings in an ongoing series of consumer surveys about online activities and perceptions. This report is based on responses from 3,000 consumers age 18 and older in France, Germany, Japan, South Korea, the United Kingdom, and the United States who play video games at least once a week.

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

- People who play video games spend an average of nearly six hours each week playing. Gamers 18-25 spend the most time, at more than seven hours each week.
- Globally, gamers spend more time playing on mobile phones than on computers, tablets, or gaming consoles. However, men and people older than 45 spend more time playing on desktop or laptop computers than any other device.
- Nearly 85 percent of gamers download free games multiple times each year. However, only 55 percent are willing to pay to download games.
- Gamers spend an average of one hour and 48 minutes each week watching other gamers play online on sites such as Twitch. This compares to two hours and 27 minutes spent watching traditional sports on broadcast television.
- Millennial gamers (age 18-35) spend more time watching other people play video games than they spend watching traditional sports on television, while younger gamers (age 18-25) spend almost an hour more each week watching online gaming than watching traditional sports.
- Globally, gamers play consecutively for an average of one hour and 20 minutes at a time.
- More than 27 percent of gamers admit to playing video games at work at least once a month.
- Nearly one third, 32 percent, would quit their job if they could support themselves as professional video gamers.
- Gamers are concerned about online security. More than half will not continue to make purchases or play games on a website that has previously suffered a security breach.
- Globally, gamers are downloading games at the same rate they did a year ago. Younger gamers are downloading games more often than a year ago.
- Gamers' most significant frustration is with the length of time it takes to download game files.
- Gamers play casual single-player games such as Candy Crush or Angry Birds more often than other types of games.
- Fast performance is more important to gamers than a game being simple to play, having an interesting storyline, or being available offline.
- Consumers prefer downloading video games rather than purchasing physical copies or renting or trading them.

EXECUTIVE SUMMARY

Early video games required dedicated consoles or a computer, which limited the access and audience to people who were willing to make the investment in gaming. The growth of mobile smartphones made it easy for anyone to download a game and play it whenever and wherever they want. This easy access to so many different games led to the growth of casual gaming. However, there is still a core group of dedicated or “hard-core” gamers, and that segment is growing.

Gamers spend an average of almost six hours each week playing. However, there is a significant difference between casual gamers and dedicated gamers. More than 20 percent of gamers play for less than one hour each week, while almost seven percent play more than 20 hours a week. Younger gamers spend more time playing each week than older ones. With the rapid growth of casual gaming, mobile phones have become the primary device people use for gaming. However, gaming consoles are still very popular with younger dedicated gamers.

As more mobile gaming apps become available online and major console games grow in size, gamers are downloading games more often than they purchase or rent physical copies. Most gamers (85 percent) download free games multiple times each year, with 44 percent downloading free games at least once a month. Only 55 percent of gamers are willing to pay to download games. Although they are downloading games many times each year, three-quarters of gamers expressed frustration with the download process.

Casual single-player games are played more often than other types of games, reflecting the growth of casual gaming. However, first-person shooter games remain very popular with males. Gamers find fast performance (game loads quickly and performance is speedy) to be most important when playing a game.

More than 60 percent said they had missed sleep while gaming, and 11 percent have missed work. Half of male gamers age 18-25 would quit their job if they could support themselves as a professional gamer.

With the growth of esports and interactive online gaming communities such as Twitch, watching people play video games is rising in popularity. Gamers are spending an average of one hour and 48 minutes each week watching others play. In fact, those under 35 are spending more time watching other gamers than they spend watching traditional sports such as football and basketball on television.

In addition, the security of online gaming sites is highly important to gamers, with 57 percent saying they would not continue to play games or do business with a gaming site that has previously experienced a security breach.

KEY FINDINGS

GAMERS SPEND SIX HOURS EACH WEEK PLAYING

Video gamers spend an average of 5.96 hours each week playing games. 20.1 percent play for an hour or less each week. 36.2 percent play between one and four hours each week. 26.8 percent play seven or more hours.

Gamers in the U.K. spend the most time playing each week, with an average of 7.15 hours. South Korea has the lowest weekly average at 4.42 hours.

Country	Less than 1 hour a week	1-2 hours a week	2-4 hours a week	4-7 hours a week	7-12 hours a week	12-20 hours a week	More than 20 hours a week	Average Hours Each Week
France	17.4%	18.2%	19.4%	18.0%	11.2%	9.0%	6.8%	6.14
Germany	14.6%	19.4%	19.0%	21.0%	11.6%	7.6%	6.8%	6.11
Japan	32.0%	16.2%	16.0%	12.4%	9.0%	6.0%	8.4%	5.48
South Korea	27.8%	20.4%	20.4%	14.6%	8.4%	3.8%	4.6%	4.42
U.K.	14.4%	15.4%	16.4%	17.8%	16.4%	12.0%	7.6%	7.15
U.S.	14.6%	19.2%	17.4%	17.2%	16.8%	7.6%	7.2%	6.44
Global	20.1%	18.1%	18.1%	16.8%	12.2%	7.7%	6.9%	5.96

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

The amount of time spent gaming each week is directly correlated to age, with younger gamers spending more time playing and older gamers spending the least time. Gamers 18-25 years old spend more than seven hours playing each week, with those over 60 playing less than five hours.

Age	Less than 1 hour a week	1-2 hours a week	2-4 hours a week	4-7 hours a week	7-12 hours a week	12-20 hours a week	More than 20 hours a week	Average Hours Each Week
18-25	15.7%	14.7%	21.2%	15.5%	14.2%	8.1%	10.6%	7.08
26-35	16.9%	15.6%	19.7%	18.4%	12.9%	8.7%	7.9%	6.51
36-45	18.8%	18.8%	16.6%	17.2%	12.9%	8.7%	6.9%	6.17
46-60	24.9%	20.6%	16.0%	16.9%	10.1%	6.6%	5.0%	5.10
Over 60	23.2%	20.8%	19.6%	14.0%	12.8%	5.2%	4.4%	4.93
All	20.1%	18.1%	18.1%	16.8%	12.2%	7.7%	6.9%	5.96

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

Men spend more time gaming each week than women, with men averaging 6.69 hours and women averaging 5.19 hours. 31.2 percent of men play seven hours or more each week, compared to 22.2 percent of women.

Gender	Less than 1 hour a week	1-2 hours a week	2-4 hours a week	4-7 hours a week	7-12 hours a week	12-20 hours a week	More than 20 hours a week	Average Hours Each Week
Female	23.6%	19.6%	18.3%	16.2%	10.9%	5.9%	5.4%	5.19
Male	16.8%	16.7%	17.9%	17.4%	13.5%	9.3%	8.4%	6.69
All	20.1%	18.1%	18.1%	16.8%	12.2%	7.7%	6.9%	5.96

Figure 3: How many hours each week do you spend playing video games?

MOBILE PHONES ARE THE PRIMARY GAMING DEVICE

A variety of devices are used for gaming. Globally, mobile phones are the primary device, but preferences vary by country. In France, Germany, and the U.K., computers are the most common device used for gaming. In Japan, South Korea, and the U.S., mobile phones are used most often. The use of gaming consoles is highest in the U.K. and lowest in South Korea where mobile phone usage is the highest.

Country	Gaming console	Computer (laptop or desktop)	Tablet	Mobile phone
France	1.49	2.07	1.03	1.62
Germany	1.30	2.18	0.83	1.54
Japan	1.36	1.40	0.88	1.93
South Korea	0.86	1.90	1.02	2.76
U.K.	1.72	1.74	1.32	1.65
U.S.	1.52	1.64	1.21	1.83
Global	1.38	1.82	1.05	1.89

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

Mobile phones are the primary gaming device for people 45 and younger, while computers are the preferred device for those 46 and older. This data is consistent with other Limelight Networks surveys that show the growing usage of mobile phones by younger consumers. Gaming consoles are most commonly used by people aged 26-35.

Age	Gaming console	Computer (laptop or desktop)	Tablet	Mobile phone
18-25	1.58	1.88	0.93	2.35
26-35	1.86	1.68	1.16	2.16
36-45	1.54	1.71	1.11	2.13
46-60	1.03	1.84	1.00	1.59
Over 60	0.54	2.36	0.96	0.78
All	1.38	1.82	1.05	1.89

Figure 5: How much of your total time playing video games is on the following devices? (Scale 0-4)

Mobile phones are the primary gaming device for women, while men prefer to use a computer. Men also use gaming consoles much more often than women.

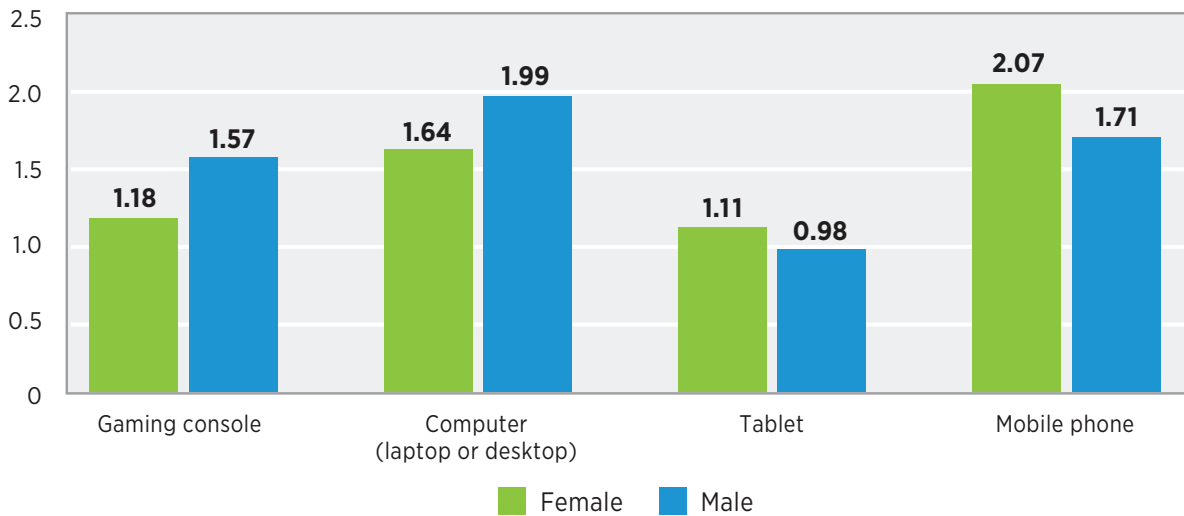


Figure 6: How much of your total time playing video games is on the following devices? (Scale 0-4)

MOST GAMERS PREFER TO DOWNLOAD GAMES

As downloading of game files has become faster and updates are made available online more frequently, downloading has become the primary way games are acquired. Globally, 59.6 percent of gamers prefer to download games rather than purchase a physical copy, rent, or trade. Renting or trading games is preferred by only 8.1 percent.

South Korea has the highest percentage of gamers who prefer to download content at 77.8 percent. The U.K. has the highest percentage who prefer to purchase a physical copy at 44.4 percent.

Country	Buy a physical copy	Download it	Rent it	Trade with another player or trade-in at a retail store
France	43.0%	45.6%	2.0%	9.4%
Germany	30.8%	60.6%	3.6%	5.0%
Japan	25.4%	62.6%	4.0%	8.0%
South Korea	15.0%	77.8%	2.6%	4.6%
U.K.	44.4%	50.8%	2.4%	2.4%
U.S.	35.2%	60.4%	3.2%	1.2%
Global	32.3%	59.6%	3.0%	5.1%

Figure 7: How do you prefer to acquire your video games?

Gamers over 60 are the most likely to download, with 68.8 percent saying they prefer to download games.

Age	Buy a physical copy	Download it	Rent it	Trade with another player or trade-in at a retail store
18-25	34.6%	58.4%	3.0%	4.0%
26-35	37.0%	55.0%	3.3%	4.7%
36-45	35.6%	57.7%	2.2%	4.6%
46-60	28.5%	62.7%	3.6%	5.3%
Over 60	20.4%	68.8%	2.0%	8.8%
All	32.3%	59.6%	3.0%	5.1%

Figure 8: How do you prefer to acquire your video games?

FREE GAMES ARE DOWNLOADED MORE THAN PAID CONTENT

Gamers download and update games frequently. 84.7 percent of gamers download free games multiple times each year. South Korean gamers download free games the most often, with 30.8 percent downloading games at least once a week.

Country	Never	2-3 times each year	Once a month	Once a week	Daily
France	17.0%	44.0%	26.4%	9.0%	3.6%
Germany	15.6%	43.8%	30.2%	8.4%	2.0%
Japan	22.0%	38.2%	23.2%	11.6%	5.0%
South Korea	7.4%	34.2%	27.6%	22.2%	8.6%
U.K.	18.0%	40.4%	26.8%	12.0%	2.8%
U.S.	12.0%	43.0%	29.6%	11.2%	4.2%
Global	15.3%	40.6%	27.3%	12.4%	4.4%

Figure 9: How often do you download free games?

Although 84.7 percent of gamers will download free games, only 72.1 percent will download free updates and new content for those games.

Country	Never	2-3 times each year	Once a month	Once a week	Daily
France	31.8%	28.4%	25.2%	10.4%	4.2%
Germany	31.6%	31.6%	23.8%	10.0%	3.0%
Japan	36.4%	27.6%	22.6%	10.2%	3.2%
South Korea	14.6%	32.6%	29.8%	16.8%	6.2%
U.K.	29.6%	27.2%	27.6%	12.0%	3.6%
U.S.	23.2%	33.4%	23.8%	13.8%	5.8%
Global	27.9%	30.1%	25.5%	12.2%	4.3%

Figure 10: How often do you update existing video games with new free content and levels?

When it comes to paying for video games, only 55.3 percent are willing to pay, compared to 84.7 percent who will download free games.

Gamers in France are the most likely to pay to download games, with more than 65 percent saying they pay to download games multiple times each year. Gamers in Japan are least likely to pay, at 45 percent. Gamers in the U.S. download paid games the most often, with almost 10 percent paying to download games at least once a week.

Country	Never	2-3 times each year	Once a month	Once a week	Daily
France	34.8%	38.4%	18.4%	6.2%	2.2%
Germany	50.0%	30.0%	14.2%	4.4%	1.4%
Japan	55.0%	25.6%	13.4%	4.6%	1.4%
South Korea	40.2%	33.4%	17.8%	7.0%	1.6%
U.K.	43.4%	28.4%	19.4%	6.6%	2.2%
U.S.	45.0%	31.4%	13.8%	5.6%	4.2%
Global	44.7%	31.2%	16.2%	5.7%	2.2%

Figure 11: How often do you pay to download games?

Older gamers are much less likely to pay to download games than younger ones. More than 70 percent of people over 60 will not pay to download them, but only 31.6 percent of those age 18-35 will not pay.

Age	Never	2-3 times each year	Once a month	Once a week	Daily
18-25	34.6%	35.5%	19.1%	7.4%	3.4%
26-35	28.6%	35.4%	24.0%	8.7%	3.3%
36-45	42.2%	30.9%	17.9%	6.0%	2.9%
46-60	56.6%	28.0%	10.8%	3.9%	0.7%
Over 60	70.4%	24.4%	4.4%	0.4%	0.4%
All	44.7%	31.2%	16.2%	5.7%	2.2%

Figure 12: How often do you pay to download games?

Less than half of people who play video games are willing to pay to update games. This indicates they may be downloading many games to try them out, but their satisfaction with those games may not drive them to long-term engagement leading them to update the games in the future.

Country	Never	2-3 times each year	Once a month	Once a week	Daily
France	48.2%	27.8%	16.0%	6.4%	1.6%
Germany	57.8%	26.2%	11.2%	4.2%	0.6%
Japan	60.4%	21.0%	12.8%	4.2%	1.6%
South Korea	41.2%	31.4%	16.0%	8.0%	3.4%
U.K.	51.8%	25.6%	14.0%	6.6%	2.0%
U.S.	50.6%	27.4%	10.4%	7.8%	3.8%
Global	51.7%	26.6%	13.4%	6.2%	2.2%

Figure 13: How often do you pay to update existing video games with new content and levels?

GAMES ARE BEING DOWNLOADED AT SAME RATE AS LAST YEAR

On average, gamers are downloading the same number of games as they were a year ago. However, one-third reported they are downloading fewer games. This is especially true in Japan and South Korea.

Country	I download the same amount as I did a year ago	I download video games less often than I did a year ago	I download video games more often than I did a year ago
France	42.4%	34.6%	23.0%
Germany	51.8%	28.6%	19.6%
Japan	28.2%	46.4%	25.4%
South Korea	31.4%	42.2%	26.4%
U.K.	47.8%	23.4%	28.8%
U.S.	46.6%	23.6%	29.8%
Global	41.4%	33.1%	25.5%

Figure 14: Are you downloading video games more or less often than you did a year ago?

Younger gamers are downloading games more often than a year ago, while very few older gamers are downloading more often.

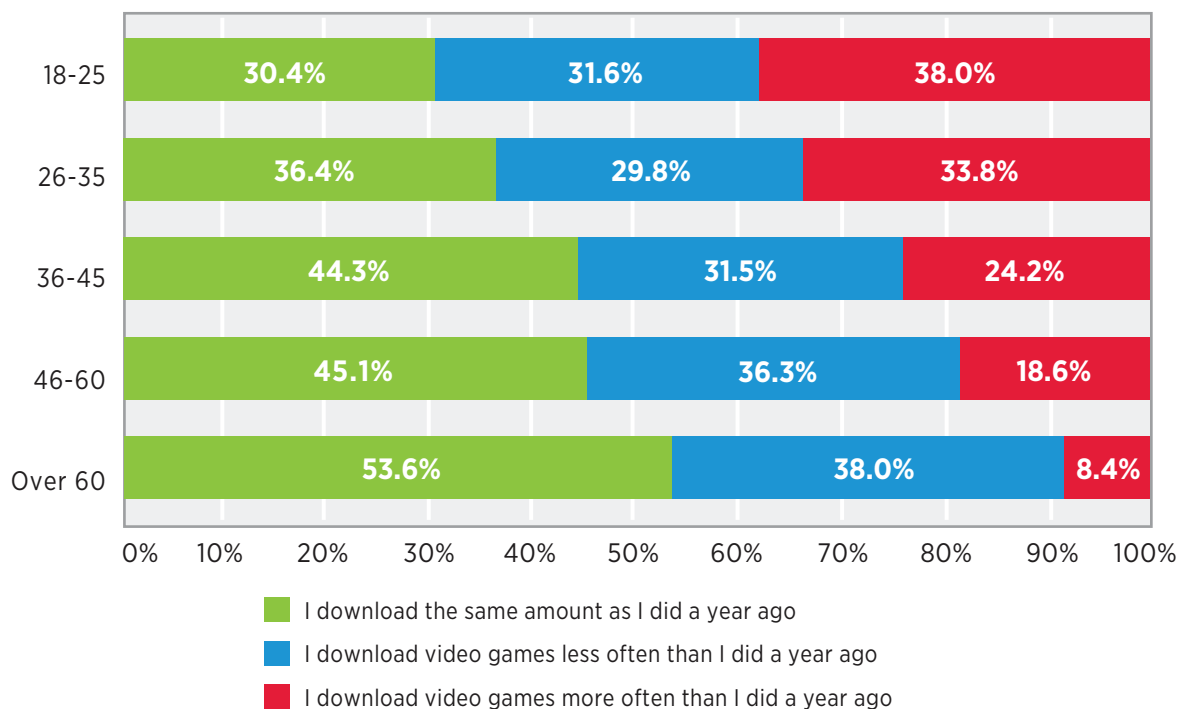


Figure 15: Are you downloading video games more or less often than you did a year ago?

GAMERS ARE FRUSTRATED BY THE DOWNLOAD PROCESS

More than three-quarters of gamers reported frustrations with downloading video games. Only 15.3 percent don't find the process frustrating.

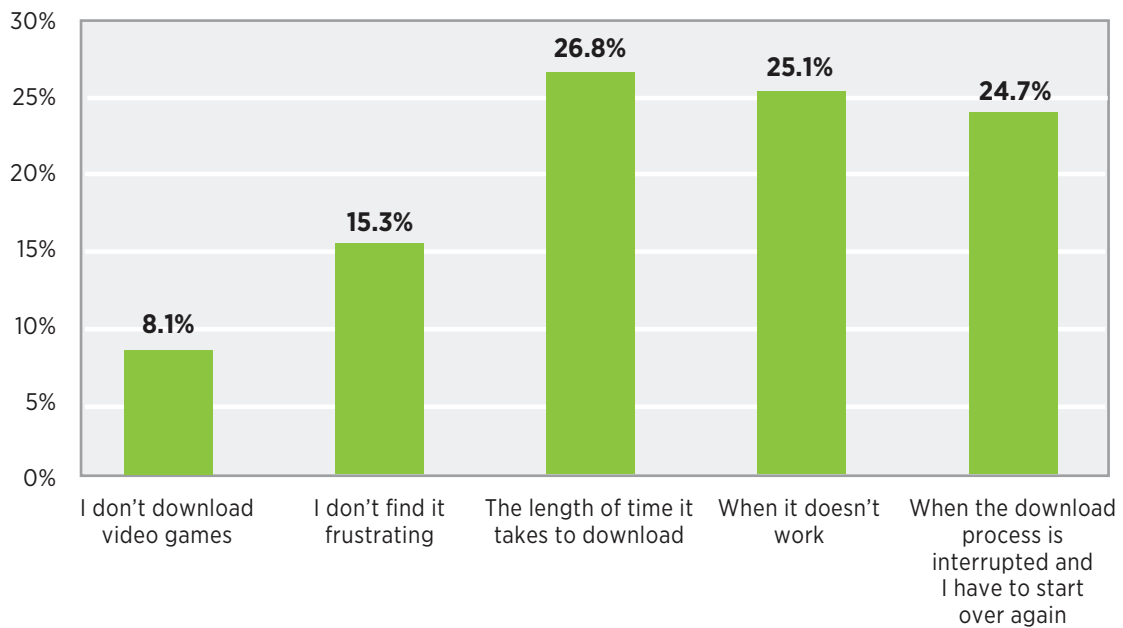


Figure 16: What is the most frustrating part of downloading video games?

Of the people who reported frustrations with downloading games, the prime frustrations were fairly evenly split between the length of time to download, when it doesn't work, and when the process is interrupted and has to be restarted. The length of time it takes to download was cited by gamers in the U.K. more than any other country.

Country	The length of time it takes to download	When it doesn't work	When the download process is interrupted and I have to start over again
France	35.1%	33.2%	31.7%
Germany	28.1%	36.8%	35.2%
Japan	37.2%	26.4%	36.4%
South Korea	31.1%	31.1%	37.9%
U.K.	41.4%	31.6%	27.0%
U.S.	37.5%	37.8%	24.7%
Global	35.0%	32.8%	32.3%

Figure 17: What is the most frustrating part of downloading video games? (Gamers who reported frustration with downloading)

Younger gamers find download speed the most frustrating, while older gamers noted when it doesn't work.

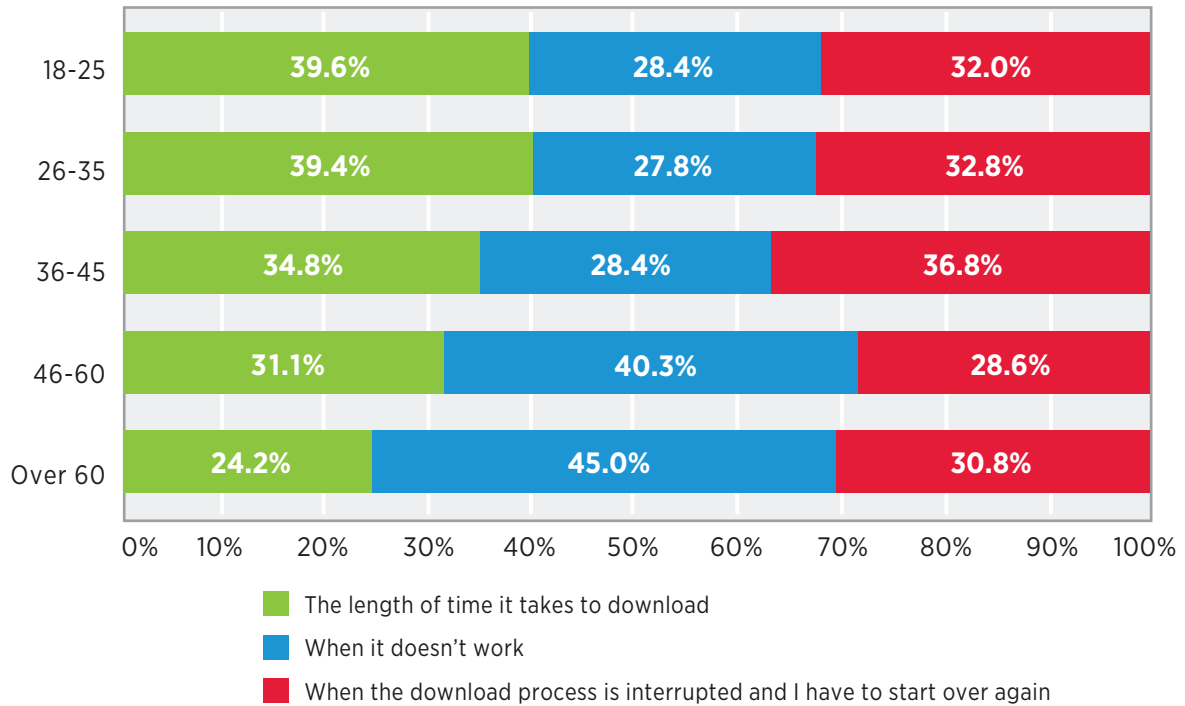


Figure 18: What is the most frustrating part of downloading video games? (Gamers who reported frustration with downloading)

CASUAL SINGLE-PLAYER GAMES ARE MOST POPULAR

Globally, gamers play casual single-player games more than any other type, followed by single-player role play, first-person shooter, massive multi-player online, and casual multi-player games. However, in Japan gamers prefer single player role-play games.

Country	Casual Single-Player games (like Candy Crush or Angry Birds)	Casual Multi-Player games (like Words With Friends)	First-Person Shooter games (like Call of Duty)	Single-Player Role-play games (like The Elder Scrolls)	Massive Multiplayer Online games (like World of Warcraft or League of Legends)
France	2.43	0.90	1.18	1.10	0.90
Germany	1.78	0.78	1.07	1.11	0.98
Japan	1.25	0.81	1.07	1.46	0.97
South Korea	1.74	1.33	1.51	1.47	1.66
U.K.	2.06	1.10	1.37	1.23	0.94
U.S.	2.39	1.28	1.20	1.05	0.90
Global	1.94	1.03	1.23	1.24	1.06

Figure 19: How much of your time playing video games is spent playing each of the following types of games? (Scale 0-4)

Both men and women spend more time playing casual single player games than any other type. However, almost twice as many men play first-person shooter games than women.

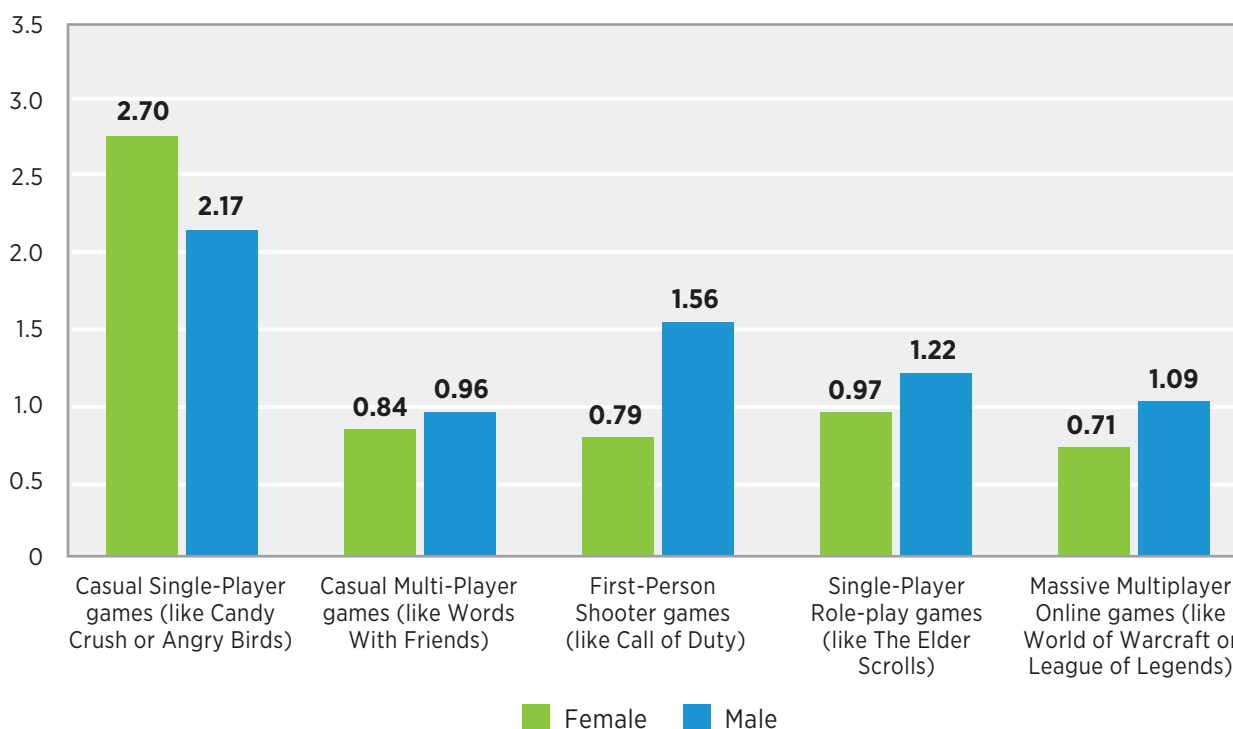


Figure 20: How much of your time playing video games is spent playing each of the following types of games? (Scale 0-4)

Older gamers spend most of their time playing casual single-player games, and very little time playing other types of games. Younger gamers prefer to play casual single-player games, but they also spend a significant amount of time playing role-play games and first-person shooter games as well.

Age	Casual Single-Player games (like Candy Crush or Angry Birds)	Casual Multi-Player games (like Words With Friends)	First-Person Shooter games (like Call of Duty)	Single-Player Role-play games (like The Elder Scrolls)	Massive Multiplayer Online games (like World of Warcraft or League of Legends)
18-25	1.94	0.89	1.41	1.61	1.04
26-35	2.20	1.33	1.39	1.35	1.13
36-45	2.69	1.02	1.41	1.38	1.14
46-60	2.52	0.69	1.01	0.79	0.73
Over 60	2.60	0.38	0.46	0.33	0.27
All	1.94	1.03	1.23	1.24	1.06

Figure 21: How much of your time playing video games is spent playing each of the following types of games? (Scale 0-4)

PERFORMANCE IS THE MOST IMPORTANT CONSIDERATION WHEN PLAYING

Fast performance is a top priority for gamers. Globally, gamers noted it as their top concern, followed by simple gameplay, an interesting storyline, and the ability to play the game when not online. However, gamers in France cited an interesting storyline as their top priority, and gamers in Japan noted simple gameplay as their top concern.

Country	Simple gameplay—the game is easy to learn and play	Interesting storyline—the characters and story are exciting	Fast Performance—the game loads quickly and performance is speedy	I can play the game when I am not connected to the Internet
France	2.51	2.65	2.63	2.58
Germany	2.69	2.60	2.84	2.63
Japan	2.45	2.44	2.38	2.26
South Korea	2.41	2.35	2.76	2.15
U.K.	2.58	2.51	2.74	2.46
U.S.	2.67	2.45	2.92	2.50
Global	2.55	2.50	2.71	2.43

Figure 22: How important are each of the following when playing a video game? (Scale 0-4)

When analyzed by age, fast performance is the top priority for all age groups except for gamers over 60 who prioritize simple gameplay.

Age	Simple gameplay—the game is easy to learn and play	Interesting storyline—the characters and story are exciting	Fast Performance—the game loads quickly and performance is speedy	I can play the game when I am not connected to the Internet
18-25	2.42	2.68	2.81	2.39
26-35	2.44	2.68	2.76	2.44
36-45	2.52	2.53	2.69	2.48
46-60	2.66	2.37	2.68	2.48
Over 60	2.75	2.08	2.54	2.18
All	2.55	2.50	2.71	2.43

Figure 23: How important are each of the following when playing a video game? (Scale 0-4)

WATCHING ONLINE GAMING IS BECOMING INCREASINGLY POPULAR

With the rapid growth of esports and online sites such as Twitch, gamers were asked how often they watch other gamers playing online, esports tournaments, traditional sports online, and traditional sports on broadcast television.

Globally, gamers watch traditional sports such as football and basketball on broadcast television most often, at an average of almost two and a half hours per week. However, in Japan and South Korea, gamers watch other people playing video games online more often than they watch traditional sports online or on broadcast television.

Country	Watch other people play video games online (such as Twitch or YouTube Gaming)	Watch esports tournaments (such as The International or LoL World Championship)	Watch traditional sports online (such as football or basketball)	Watch traditional sports on television (such as football or basketball)
France	1.44	0.94	1.36	1.92
Germany	1.38	0.83	1.81	2.49
Japan	2.01	1.01	1.42	1.86
South Korea	2.64	1.79	1.87	2.28
U.K.	1.76	1.34	1.80	2.76
U.S.	1.56	1.13	1.97	3.41
Global	1.80	1.17	1.70	2.45

Figure 24: How many hours each week do you do the following?

Gamers in South Korea spend the most time watching other people play video games, with almost 80 percent watching weekly.

Country	Never	Less than 1 hour each week	1-3 hours each week	3-7 hours each week	7-15 hours each week	More than 15 hours each week
France	64.8%	13.2%	10.8%	5.8%	2.4%	3.0%
Germany	55.0%	21.8%	10.8%	7.0%	4.2%	1.2%
Japan	44.6%	22.8%	17.4%	7.2%	4.6%	3.4%
South Korea	21.4%	30.8%	24.2%	14.4%	6.2%	3.0%
U.K.	52.0%	18.8%	14.2%	7.4%	5.6%	2.0%
U.S.	52.0%	21.0%	13.4%	8.2%	3.4%	2.0%
Global	48.3%	21.4%	15.1%	8.3%	4.4%	2.4%

Figure 25: How many hours each week do you watch other people play video games online?

Gamers in the U.S. spend the most time watching traditional sports on television, with 78.0 percent watching weekly and 3.8 percent watching more than 15 hours each week.

Country	Never	Less than 1 hour each week	1-3 hours each week	3-7 hours each week	7-15 hours each week	More than 15 hours each week
France	46.4%	17.4%	20.2%	10.0%	3.0%	3.0%
Germany	31.6%	23.0%	21.4%	16.0%	5.0%	3.0%
Japan	36.2%	26.4%	22.4%	8.6%	4.8%	1.6%
South Korea	26.2%	28.2%	25.6%	12.6%	5.4%	2.0%
U.K.	32.6%	18.6%	21.6%	17.2%	7.0%	3.0%
U.S.	22.0%	17.6%	28.0%	19.0%	9.6%	3.8%
Global	32.5%	21.9%	23.2%	13.9%	5.8%	2.7%

Figure 26: How many hours each week do you watch traditional sports on television?

When viewed by age, there are significant differences in time spent watching online gaming and esports tournaments. Gamers 18-35 spend more time watching other people play video games than they spend watching traditional sports on television. Gamers 18-25 spend nearly an hour more each week watching online gaming than watching traditional sports.

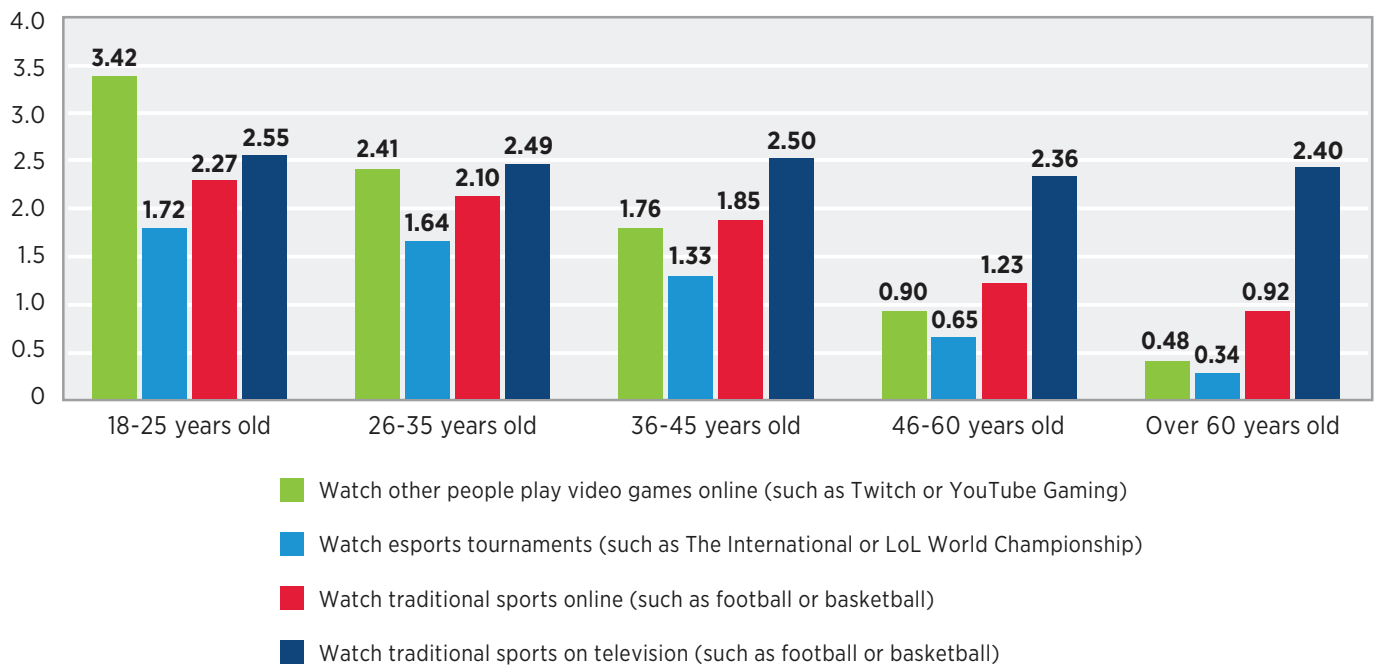


Figure 27: How many hours each week do you do the following?

Younger gamers spend much more time watching other people play video games than older gamers. Almost three-quarters of gamers 18-25 years old watch other people play video games online each week, while less than one-third of those older than 45 do so.

Age	Never	Less than 1 hour each week	1-3 hours each week	3-7 hours each week	7-15 hours each week	More than 15 hours each week
18-25	26.5%	20.4%	22.9%	14.9%	10.4%	4.9%
26-35	33.3%	26.1%	18.4%	13.0%	6.4%	2.8%
36-45	46.3%	24.1%	15.4%	7.7%	3.8%	2.7%
46-60	62.5%	19.8%	11.4%	3.8%	1.5%	1.1%
Over 60	82.8%	9.2%	4.8%	2.0%	0.0%	1.2%
All	48.3%	21.4%	15.1%	8.3%	4.4%	2.4%

Figure 28: How many hours each week do you watch other people play video games online?

When it comes to watching traditional sports on television, there is much less variability in the viewing habits of each age group.

Age	Never	Less than 1 hour each week	1-3 hours each week	3-7 hours each week	7-15 hours each week	More than 15 hours each week
18-25	38.0%	20.6%	20.0%	11.9%	5.1%	4.5%
26-35	29.6%	23.6%	23.7%	14.4%	6.4%	2.4%
36-45	29.4%	23.8%	23.1%	14.6%	7.1%	2.1%
46-60	32.6%	20.5%	25.0%	14.5%	5.1%	2.4%
Over 60	38.0%	19.6%	21.6%	12.4%	4.8%	3.6%
All	32.5%	21.9%	23.2%	13.9%	5.8%	2.7%

Figure 29: How many hours each week do you watch traditional sports on television?

When viewed by gender, men watch significantly more traditional sports each week than women.

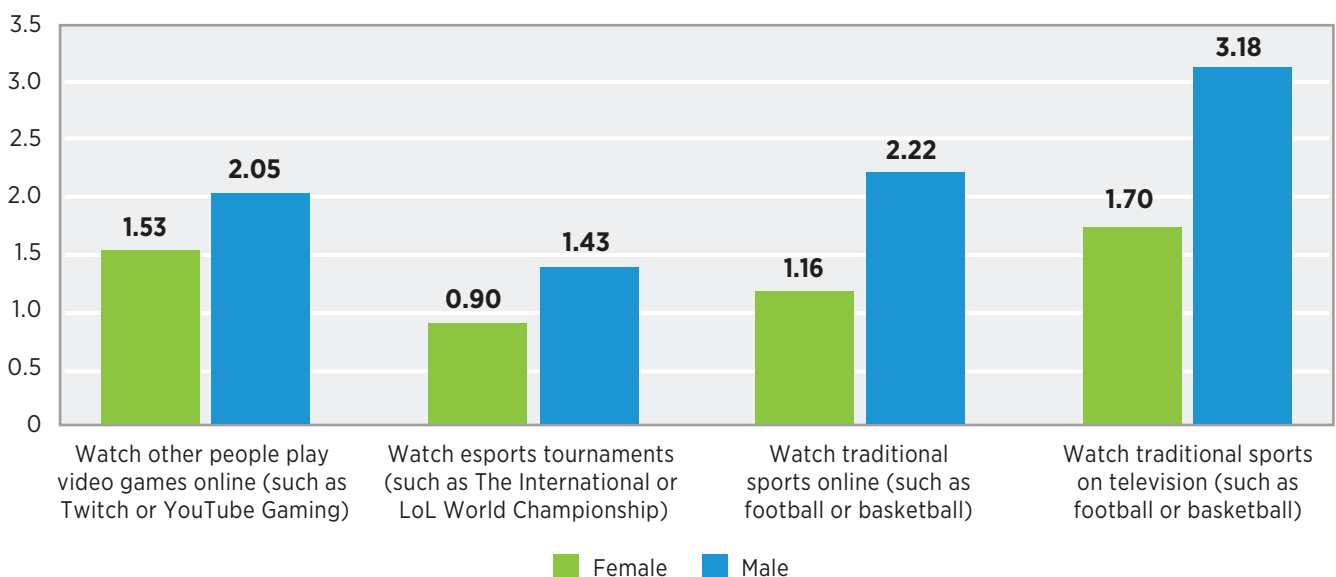


Figure 30: How many hours each week do you do the following?

GAMERS PLAY FOR MORE THAN AN HOUR AT A TIME

When people play video games, they play for an average of one hour and 20 minutes at a time. This average was fairly consistent across the countries in the survey, ranging from a low of one hour and 14 minutes of consecutive play in France to one hour and 28 minutes in South Korea.

Country	Average Time
France	1 hour 14 minutes
Germany	1 hour 20 minutes
Japan	1 hour 16 minutes
South Korea	1 hour 28 minutes
U.K.	1 hour 23 minutes
U.S.	1 hour 22 minutes
Global	1 hour 20 minutes

Figure 31: When you play video games, how long do you consecutively play?

Younger gamers play longer than older gamers, with those 18-25 years old playing for an average of almost two hours consecutively and those older than 45 playing for less than one hour. More than 5 percent of gamers under 26 play for more than 5 hours at a time while less than 1 percent of those older than 60 do so.

Age	Less than 10 minutes at a time	10-30 minutes at a time	30 minutes to 1 hour at a time	1-2 hours at a time	2-5 hours at a time	More than 5 hours at a time	Average Time
18-25	5.5%	9.3%	24.6%	31.4%	23.8%	5.3%	1 hour and 54 minutes
26-35	4.6%	15.4%	25.6%	32.3%	18.7%	3.4%	1 hour and 37 minutes
36-45	4.6%	20.6%	33.5%	28.1%	10.4%	2.8%	1 hour and 19 minutes
46-60	7.1%	27.8%	34.0%	23.5%	6.1%	1.5%	1 hour and one minute
Over 60	8.4%	35.2%	35.6%	16.8%	3.2%	0.8%	49 minutes
All	5.8%	21.1%	30.7%	27.2%	12.4%	2.8%	1 hour and 20 minutes

Figure 32: When you play video games, how long do you consecutively play?

MORE THAN ONE-QUARTER OF GAMERS PLAY AT WORK

More than 27 percent of gamers who work play video games at work at least once a month. The gamers who play during work the most are in South Korea, where 36 percent play at least once a month and more than 10 percent play daily. The lowest rate of gaming at work is in Germany, with less than 3 percent playing daily.

Country	I never play video games during work	I play video games during work once a month	I play video games during work once a week	I play video games during work daily
France	76.6%	8.7%	8.7%	6.0%
Germany	80.3%	9.9%	6.9%	2.9%
Japan	80.0%	8.5%	7.4%	4.1%
South Korea	64.0%	14.8%	10.9%	10.4%
U.K.	73.2%	9.6%	9.8%	7.4%
U.S.	61.0%	14.6%	15.6%	8.9%
Global	72.7%	11.0%	9.7%	6.6%

Figure 33: How often do you play video games during work?

Younger gamers are the most likely to play at work, with more than a third of people 35 and younger playing each month and 8 percent playing daily.

Age	I never play video games during work	I play video games during work once a month	I play video games during work once a week	I play video games during work daily
18-25	65.0%	16.3%	10.1%	8.6%
26-35	66.8%	12.7%	13.0%	7.6%
36-45	72.4%	11.4%	10.3%	5.9%
46-60	80.1%	7.1%	7.1%	5.8%
Over 60	84.8%	7.6%	3.8%	3.8%
All	72.7%	11.0%	9.7%	6.6%

Figure 34: How often do you play video games during work?

ONE-THIRD OF GAMERS WOULD LIKE TO TURN PROFESSIONAL

Nearly one-third of gamers who work would quit their job and become a professional gamer if they could support themselves by doing so. The highest rate of people saying they want to become professional gamers is in the U.K. at 41.8 percent. The lowest rate is in Japan at 23.0 percent.

Country	No	Yes
France	65.3%	34.7%
Germany	66.6%	33.4%
Japan	77.0%	23.0%
South Korea	74.8%	25.2%
U.K.	58.2%	41.8%
U.S.	64.6%	35.4%
Global	67.9%	32.1%

Figure 35: Would you quit your job if you could support yourself as a professional video game player?

Younger gamers are the most interested in becoming professional gamers.

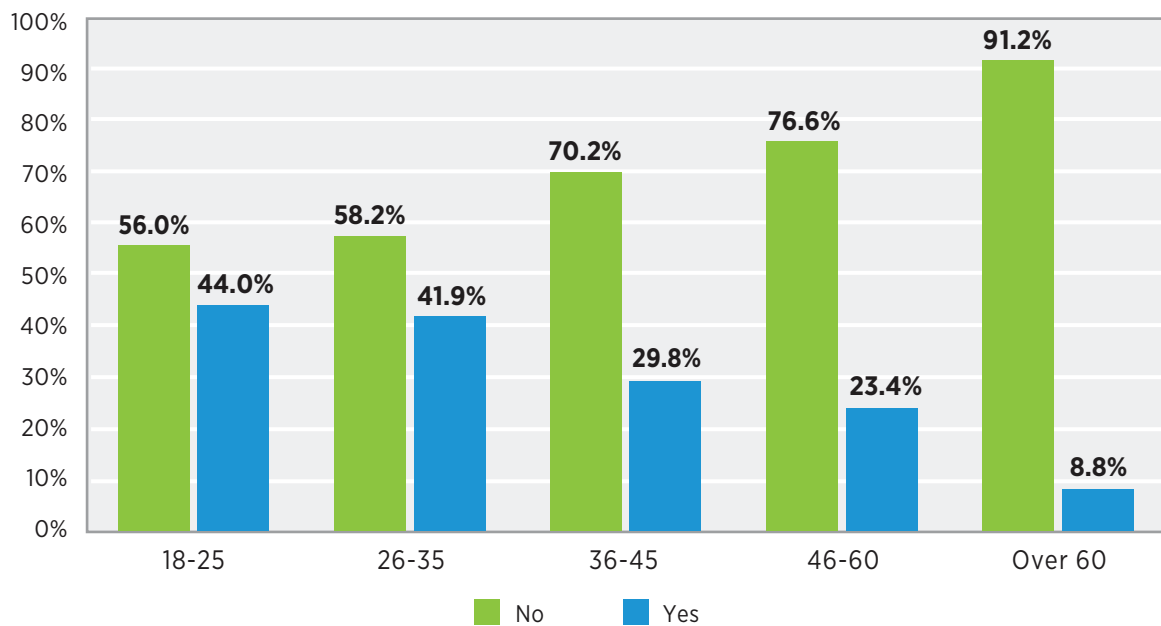


Figure 36: Would you quit your job if you could support yourself as a professional video game player?

When viewed by gender, males are much more likely to want to become professional gamers, with half the males age 18-25 wanting to turn professional.

Males	No	Yes
18-25	50.0%	50.0%
26-35	50.8%	49.2%
36-45	65.8%	34.2%
46-60	73.6%	26.4%
Over 60	94.1%	5.9%
All Males	64.3%	35.7%

Figure 37: Would you quit your job if you could support yourself as a professional video game player? (Males)

GAMERS OFTEN MISS DAILY ACTIVITIES WHILE PLAYING

Gamers often become so engrossed in a game they are playing that they miss common daily activities. 61.6 percent of gamers report missing sleep while playing, 38.9 percent have skipped a meal, 21.2 percent have missed a shower, and 11.1 percent have skipped work.

The sleepest gamers are in South Korea, where 74.4 percent have missed sleep while gaming. The hungriest gamers are in Germany where 57.4 percent have skipped a meal. The gamers most likely to miss work are in France where almost 20 percent have skipped work while gaming.

Country	A Meal	Work	Shower	Sleep
France	41.2%	19.8%	21.0%	55.6%
Germany	57.4%	7.0%	21.8%	51.6%
Japan	24.0%	10.4%	16.8%	66.2%
South Korea	28.8%	15.8%	16.8%	74.4%
U.K.	41.2%	8.2%	23.8%	57.6%
U.S.	41.0%	5.6%	26.8%	64.0%
Global	38.9%	11.1%	21.2%	61.6%

Figure 38: What daily activities have you missed due to playing a video game? (Select all that apply)

MORE THAN HALF OF GAMERS WON'T VISIT WEB SITES THAT HAVE BEEN BREACHED

Gamers are concerned about online security. 57.0 percent will not continue to make purchases or play games on a website that has previously suffered a security breach. Only 13.6 percent said they would continue to do business with a website after it has been hacked.

Gamers in South Korea are most concerned about online security, with 71.2 percent saying they will no longer visit sites that have been hacked.

Country	I am not sure	No	Yes
France	20.4%	68.2%	11.4%
Germany	40.2%	43.0%	16.8%
Japan	24.0%	67.2%	8.8%
South Korea	16.8%	71.2%	12.0%
U.K.	38.6%	45.2%	16.2%
U.S.	36.2%	47.2%	16.6%
Global	29.4%	57.0%	13.6%

Figure 39: Will you continue to play online games or make purchases from a gaming website that has previously experienced a security breach or been hacked?

Women are more concerned about online security than men, with only 9.6 percent saying they will continue to do business with a site that has been hacked, compared to 17.5 percent of men.

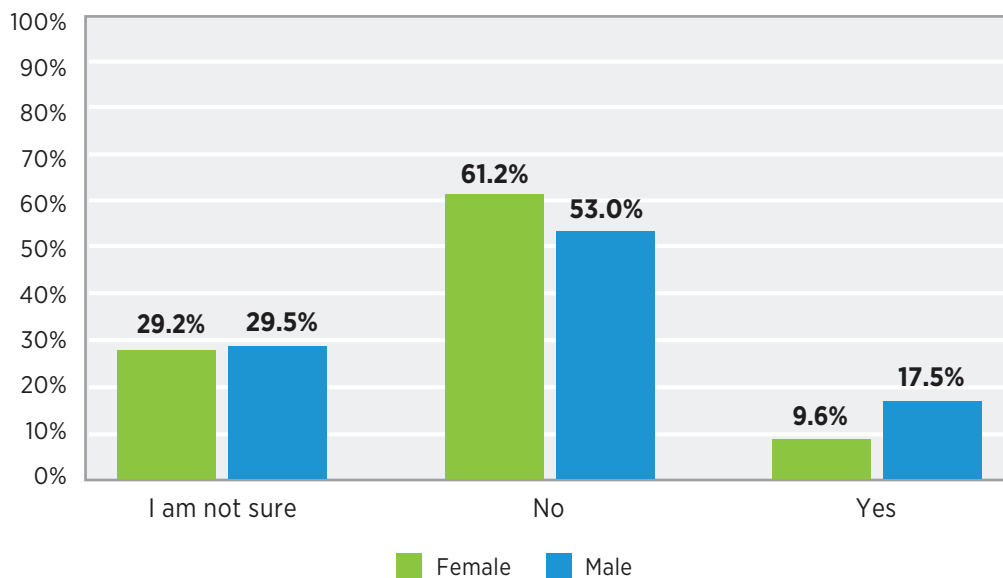


Figure 40: Will you continue to play online games or make purchases from a gaming website that has previously experienced a security breach or been hacked?

CONCLUSIONS AND RECOMMENDATIONS

High quality experiences are the key to keep gamers playing and coming back for more. To maximize marketing and revenue opportunities, gaming sites and game distributors should consider the following:

MAKE IT EASY TO TRY YOUR PAID CONTENT

Although 85 percent of gamers download free games multiple times each year, only 55 percent regularly pay to download games. To encourage customers to pay for your content, make it easy for them to try games for free for a limited period of time to gain their interest. In-app purchases are also a successful strategy to allow gamers to play for free with the option to pay for additional content or enhanced game capabilities.

OPTIMIZE THE GAME DOWNLOAD PROCESS

Gamers download content frequently throughout the year. However, three-quarters expressed frustration with the download process, which can lead to lost sales. To ensure customers receive the best possible download experience, deploy a Content Delivery Network (CDN) that is able to cache content in multiple locations that are close to your customers. The CDN should have ample egress capacity in all global locations to ensure consistent download performance, even during major software launches. A CDN with a dense caching architecture in each Point of Presence is also essential to ensure content stays in cache as long as possible for the fastest performance for all your content, regardless of an end-user's location. New software should be pre-positioned in the global caches prior to release to provide the fastest download experiences as soon as new content is released.

PROTECT YOUR INFRASTRUCTURE WITH CLOUD-BASED SECURITY SOLUTIONS

Gamers are concerned about online security. More than 50 percent will not continue to make purchases or play games on sites that have previously suffered a security breach. To ensure the security of your web site and user data, a Web Application Firewall (WAF) should be utilized to protect web applications from malicious HTTP attacks such as SQL injection and cross-site scripting. Another consideration so WAF protection does not impact site performance, is to integrate it between the CDN and the web application infrastructure. By doing this, only requests for dynamic content or content that has not been previously cached need to be inspected by the WAF, increasing overall content delivery performance. In addition, Distributed Denial of Service (DDoS) protection is necessary so hackers are not able to take your website offline or block access to software downloads by overwhelming it with malicious traffic. For optimal performance under DDoS attack, implement DDoS mitigation utilizing a CDN that has scrubbing centers integrated into its CDN network, rather than needing to divert traffic to a different network when scrubbing is required.

APPENDIX

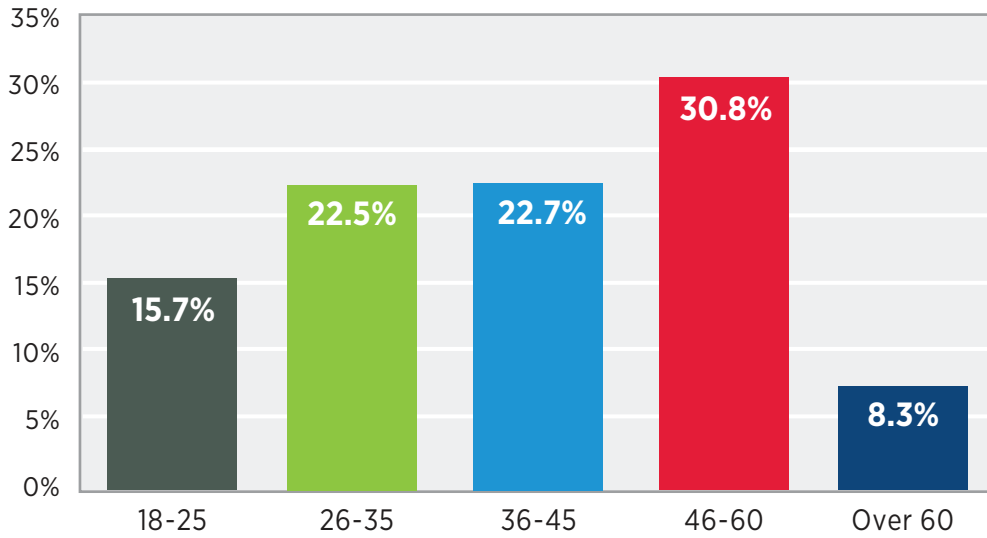


Figure 41: How old are you?

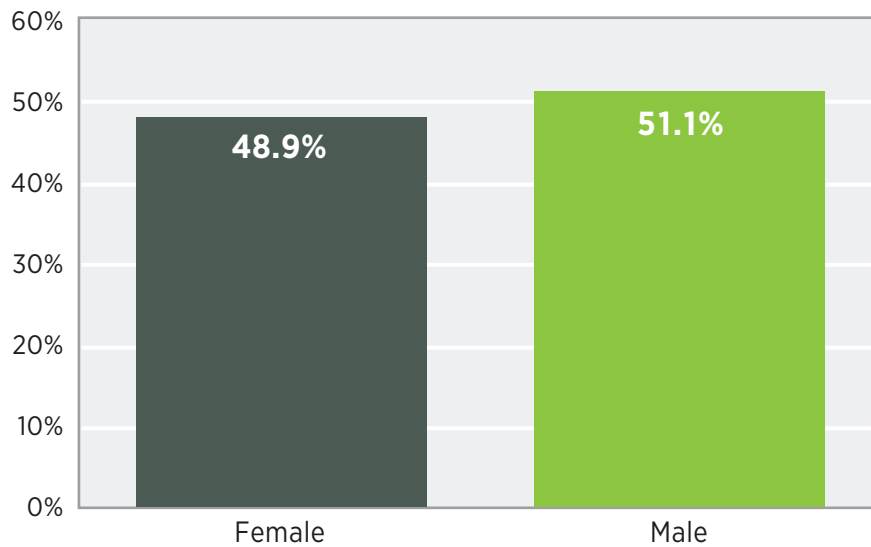


Figure 42: What is your gender?

METHODOLOGY

This survey was fielded by a third-party company with access to consumer panels in France, Germany, Japan, South Korea, the United Kingdom, and the United States. 500 responses were collected from each country for a total of 3,000 global responses. Survey responses were collected between January 12-14, 2018.

ABOUT LIMELIGHT NETWORKS

Limelight Networks, Inc., (NASDAQ: LLNW), a global leader in digital content delivery, empowers customers to better engage online audiences by enabling them to securely manage and globally deliver digital content, on any device. The company's Limelight Orchestrate Platform includes a global infrastructure with a fully-integrated suite of capabilities and services to help you address all your content delivery needs. The Orchestrate Platform solves your most important content delivery challenges so you can deliver the next great digital experience anywhere. For more information, please visit www.limelight.com, and follow us on Twitter, Facebook and LinkedIn.

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