



UNITY 2022 MULTIPLAYER REPORT

A cartoon illustration of a green, frog-like character with large eyes and a purple hood, standing on a mossy rock. The character is wearing brown pants and black shoes. The background is a solid blue color. The text "Ship of Fools, Fika Productions" is visible in the lower right area, and "2 of 26 | unity.com" is at the bottom right.

INTRODUCTION

More than half the global population (52%) play games, and of those gamers, 77% play multiplayer games.

As the market expands and more complex multiplayer games are made, the list of areas to focus on and understand grows.

Unity has surveyed players in key gaming markets around the world to discover more about the features and functionality players want from their multiplayer games.

These insights are not an instructional piece on what type of game you should build. This data can influence decisions, but it's open to your interpretation. Additionally, If you want to find out more about the dataset, check out the “about the data” section.

WE ASKED QUESTIONS AROUND WHAT GAMERS ARE PLAYING, DISCOVERING:

- The most important factors for players when choosing a new multiplayer game
- The most important factors for a positive multiplayer experience
- Favored genres
- How people are playing games
- Who do they play with and how do they communicate
- The differences between core and casual gamers
- How they buy DLC

Knockout City, Velan Studios

MOST POPULAR GENRES

According to Unity data, genre is the number one factor for what people choose to play (49% put genre in their top three factors). While this is to be expected, what specific genres stand out as the current top choice for multiplayer gamers?

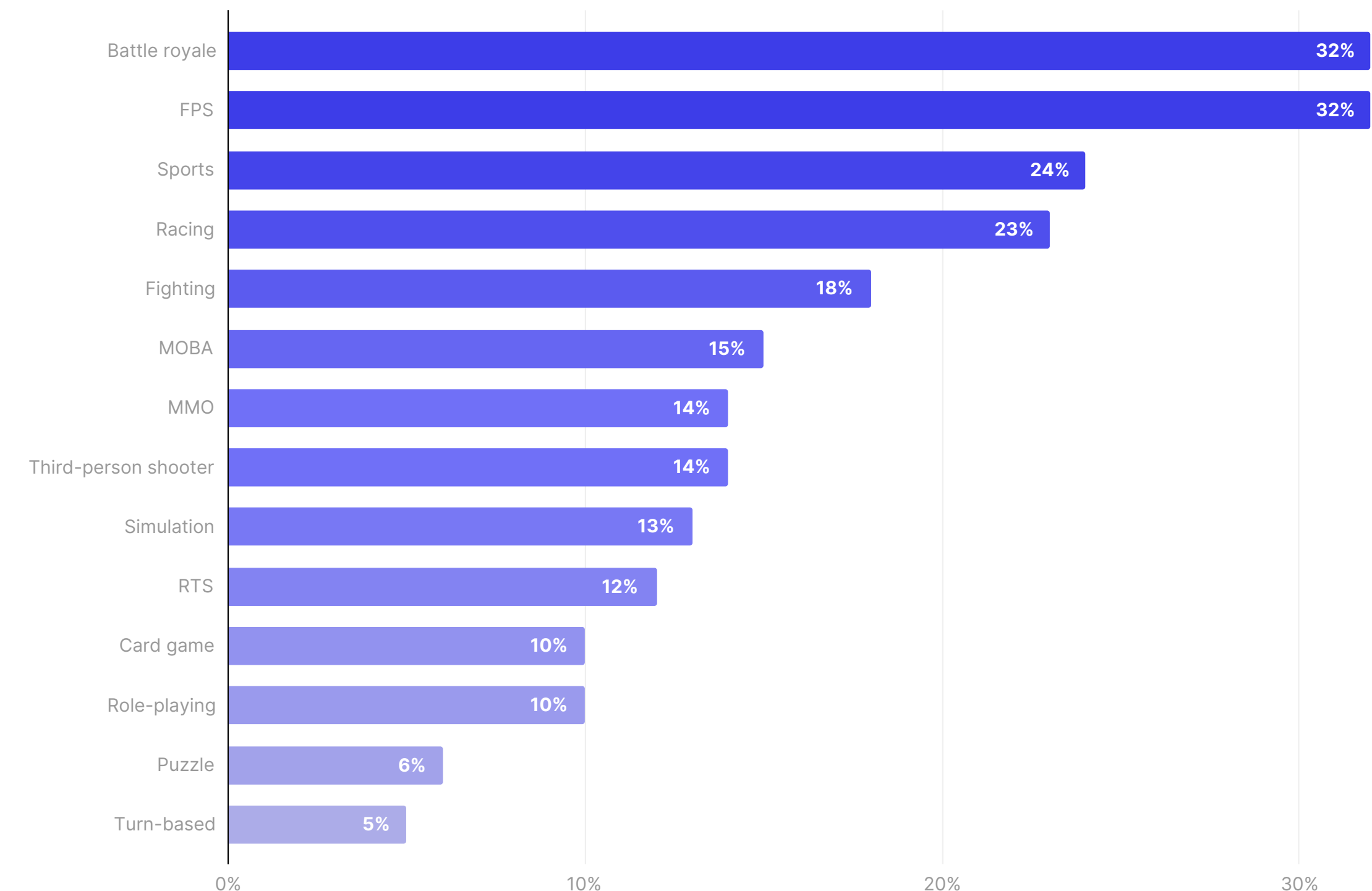
Across the countries surveyed (U.S., U.K, Japan, South Korea – representing four of the top six by gaming revenue globally), battle royale and FPS games take the cake in the overall popularity contest with multiplayer gamers, but there's healthy interest in a wide variety of game types.

32%
OF MULTIPLAYER
GAMERS PICK
BATTLE ROYALE
AND **FPS**
AMONG THEIR
FAVORITE GENRES

To note, we surveyed multiplayer gamers, so while all of these genres can have multiplayer features, we would expect this distribution to skew towards the “classic” genres.

Picking up the last spot on the popularity contest are turn-based games. With popularity skewing towards sports and FPS, it stands to reason that perhaps the most stereotypically single-player genre is the least played multiplayer game genre.

What percentage of multiplayer gamers choose each of these as their top three genres?



MOBA AND RTS
GENRES ARE MOST
POPULAR IN
KOREA

But how does genre popularity vary across the globe?

Using this overall distribution, we compared each country's results as a distance from the mean below. You can then see how a demographic reacts to a genre relative to the other demographics.

Where does multiplayer genre popularity vary from the average?



Multiplayer gamers have more polarized thoughts when it comes to MOBA, RTS, FPS, and sports genres – they are either very popular or unpopular, depending on the region.

For example, the MOBA and RTS genres are significantly more popular in Korea than any other region.

Another stand out genre for regional popularity is sports, where the U.K gamers' strong preference for the genre shows – especially in contrast to gamers in Japan, where sports games are less popular in comparison.

We also see a couple of genre and region combinations that index much lower than the other cohorts. Japanese gamers under-index on FPS as well sports, while Korean gamers under-index on racing, fighting, and FPS games.

U.K gamers as a whole prefer FPS and sports genres comparatively more than other regions, but rank lower in RTS and MOBA games compared to the other nations.

U.S. gamers stay mostly in-line with the global averages, however, do index low with MOBA, and high with card games as well as FPS.

WHAT ARE MULTIPLAYER GAMERS PLAYING?

Multiplayer gaming comes in all shapes and sizes, and the idea that it revolves around any single genre is a thing of the past. While FPS and other shooter games dominate the headlines, there is much more diversity in what people are playing in 2022.

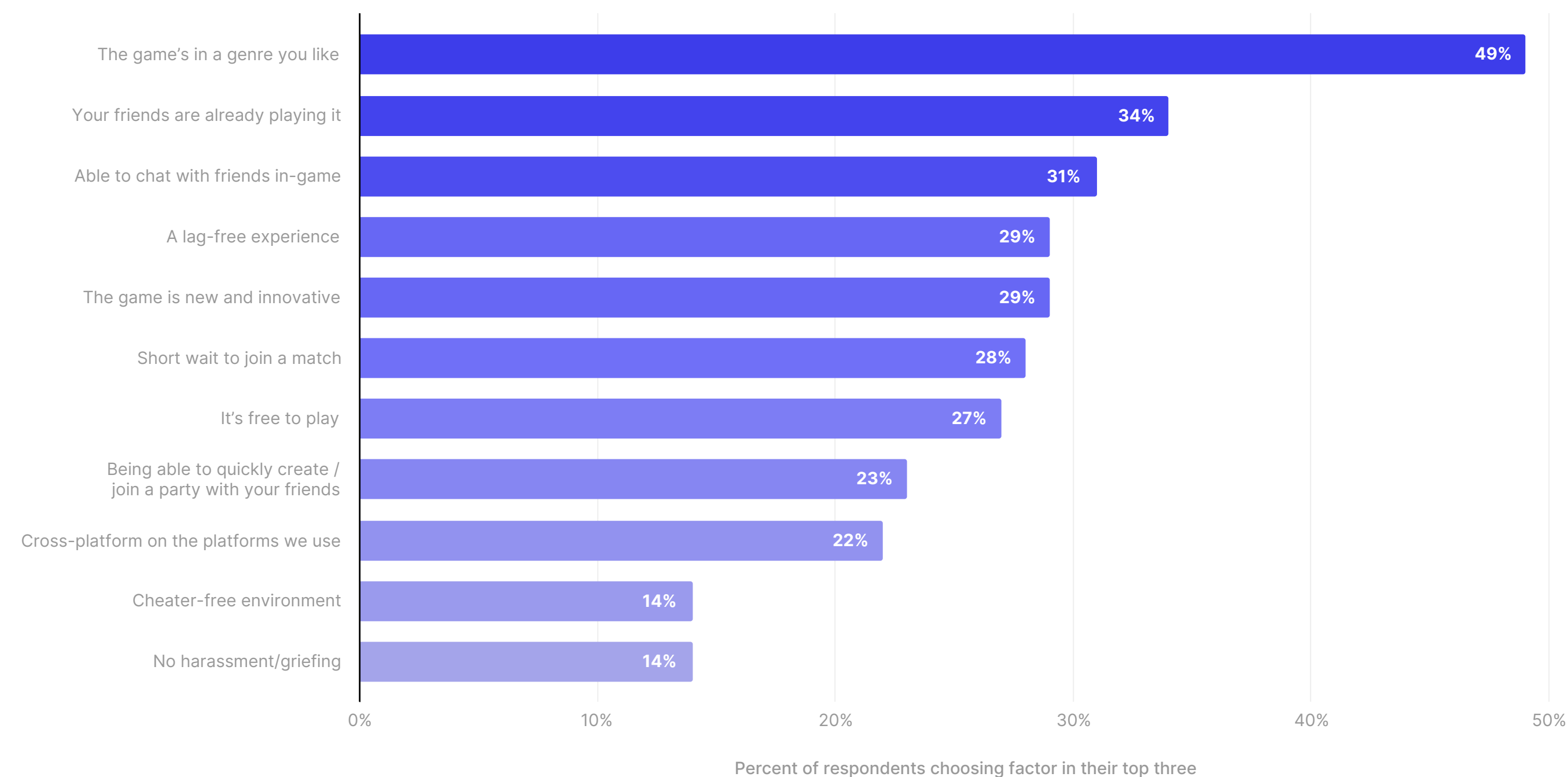
Games are often popular depending on region, some rank higher for casual gamers, and others are picked for the social aspects that allow you to communicate with other players.

Let's begin with a breakdown of what gamers are looking for when they pick their next online game.



CHOOSING A NEW MULTIPLAYER GAME

What are the most important features when multiplayer gamers choose a new game?



31%
CONSIDER
IN-GAME CHAT
AS A KEY FACTOR
FOR CHOOSING
THEIR NEXT GAME

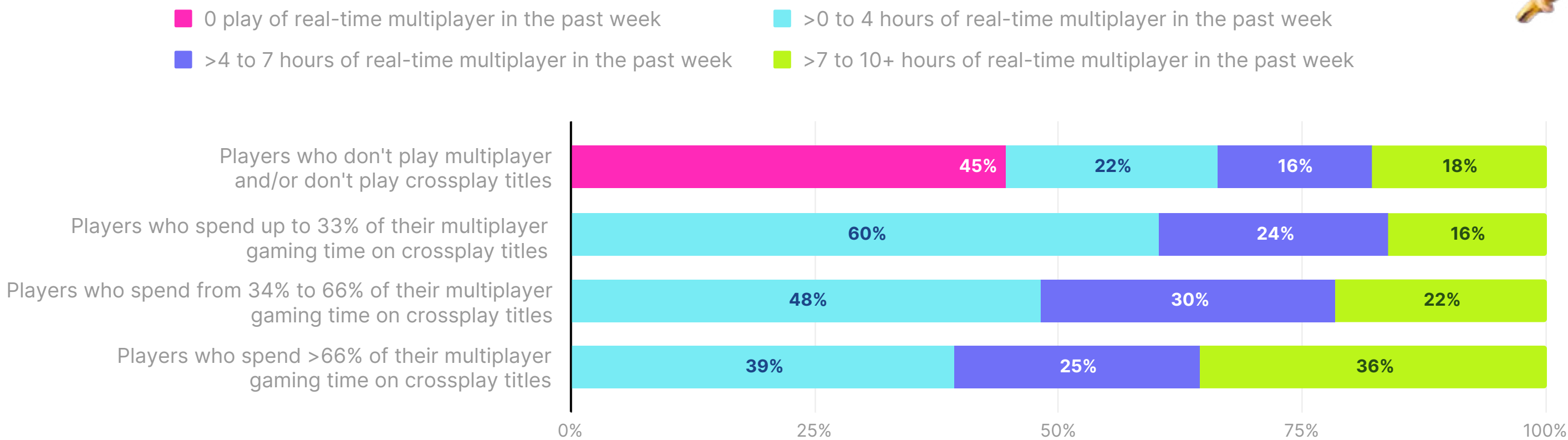
When it comes to choosing the next game to play, social features are a prime decision driver.

Game genre aside, the second and third most important game features center around social connection – with the ability to chat with friends in-game and having friends already playing the game being key decision factors.

Prospective gamers want to pick up a game that their friends are playing and chat with them while they play. Providing an in-game chat option to facilitate that connection within the game is a priority, as gamers prefer an in-game option rather than using a separate app or device.

Multiplayer gaming isn't only about the social experience – gamers also prioritize more technical aspects of the experience like smoothness, lag-free gameplay, innovative mechanics, and short waits to join matches.

Does crossplay gaming lead to more engagement?



GAMERS WHO PLAY
CROSSPLAY
TITLES SPEND MORE TIME
PLAYING **MULTIPLAYER**

- 22% of gamers responded that crossplay capabilities was a top three factor for them. This may suggest that friend groups have already gathered on the same platform.
- 91% of real-time multiplayer gamers play crossplay games, and gamers who spend more time playing crossplay titles spend more time playing multiplayer.



Last Epoch, Eleventh Hour Games

CASUAL VERSUS CORE GAMER GENRES

When talking about genre popularity, a factor to consider with how we gathered our data is the type of multiplayer gamer – are they casual or core gamers*? How does their type affect the genres they frequent?

In this survey, we separated respondents into two types, casual or core, based on their time investment into a few categories. We collected responses from ~1,400 gamers, split about 50/50 between core and casual groups.

*Defined in about the [data section](#)



Casual gamers

Those who spend at least two hours gaming per week, of which at least 30 minutes is playing multiplayer.

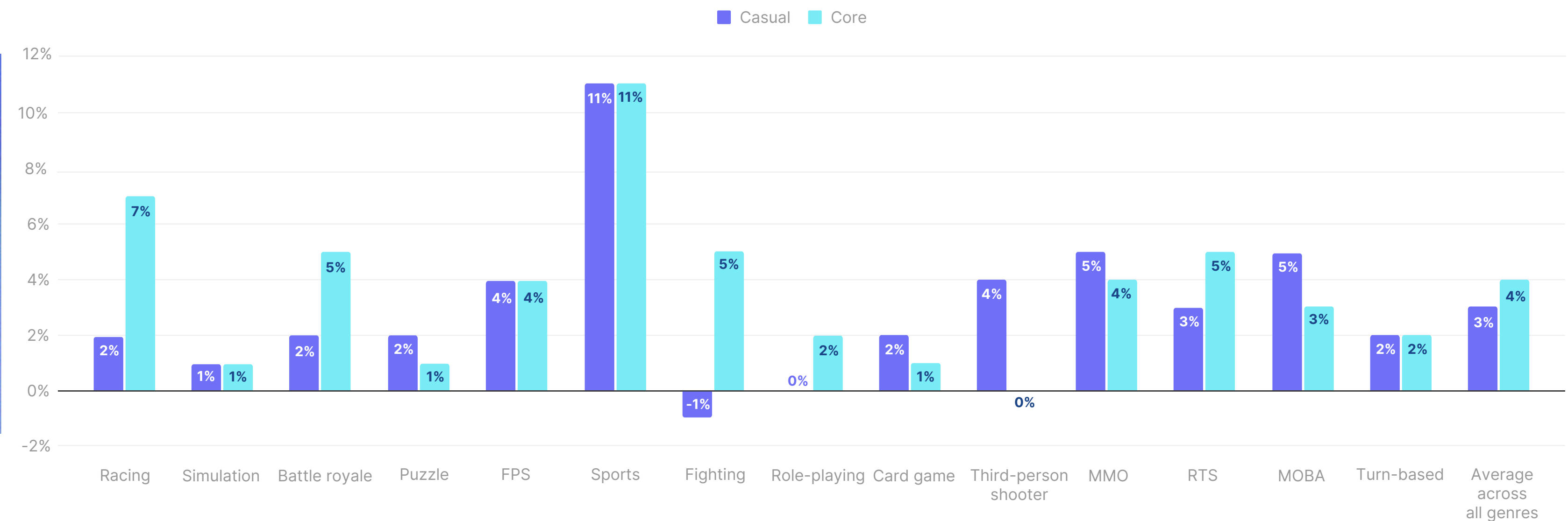


Core gamers

Those who spend at least four hours playing multiplayer games per week in any combination of the “traditionally” multiplayer genres of shooters (battle royale, FPS, third person shooter), MOBAs, MMOs, racing, sports, or fighting games.

What genres had core and casual gamers played the week preceding survey completion?

EVERY GENRE
SURVEYED **INCREASED**
IN PLAYTIME FROM
2021 BY AN AVERAGE
3%



While core audiences index higher on traditional multiplayer games by definition, casual gamers weren't restricted to specific game types, such as card and puzzle games.

All gamers show equal or near interest in card games, puzzle, simulation and role-playing games whether they are core or casual gamers, indicating that these genres are more inviting for gamers of all backgrounds and experience levels.

However, the genres with the largest gaps in interest were in FPS, sports, and fighting games with core gamers being 23% more likely to have played an FPS in the last week than a casual gamer.

Racing is actually the most popular genre for casual gamers. Simulation takes the second prize for casual interest and puzzle and battle royale come in joint third despite battle royale being 15% more likely to be played by a core gamer.

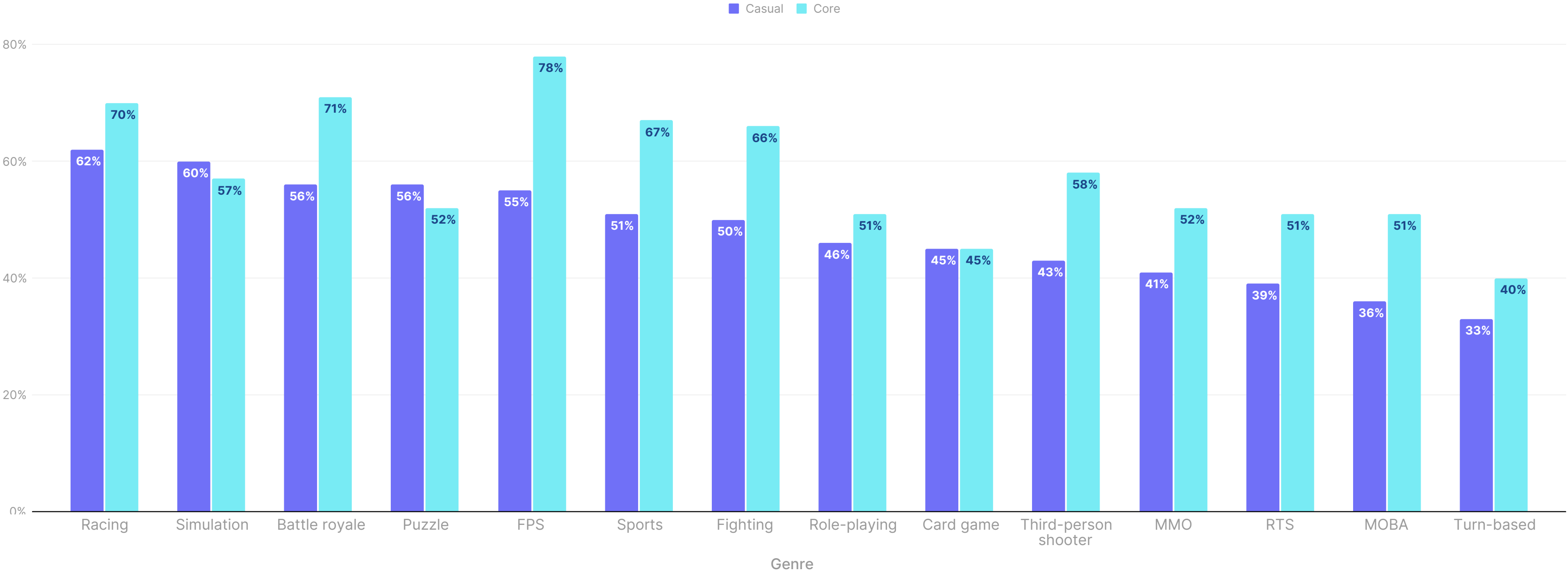
Also note-worthy here is the medium-high percentage of gamers reporting having played a puzzle game recently, though it ranks second-to-last on the “favorite genres” question, above.

The shooter genres (battle royale, FPS, third-person shooter) are an interesting group for casual gamers, as while battle royale and FPS are in the top half of their preferences, third person shooters rank in the bottom half.

For the most part, however, there wasn't too significant a gap between core and casual audiences for most genres.

THE LARGEST
DIFFERENCE IN
PLAYTIME BETWEEN
CORE AND CASUAL
GAMERS WAS IN
FPS GAMES

2021 vs 2022:
What genres had
core and casual
gamers played the
week preceding
survey completion?



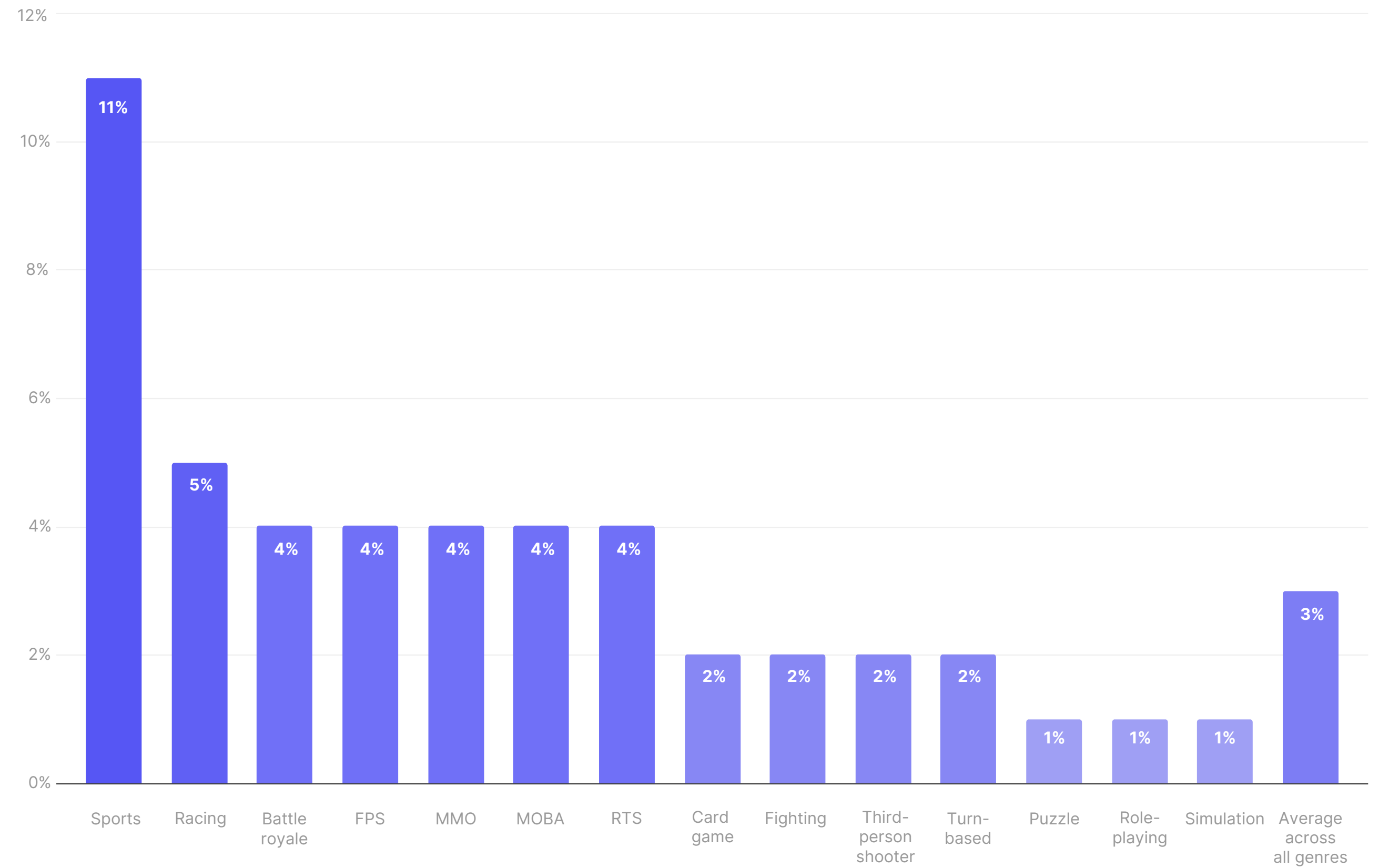
SPORTS GAMERS ARE

11%

MORE ENGAGED
THAN LAST YEAR



How much more engaged were multiplayer gamers
in each genre in 2022 vs 2021?



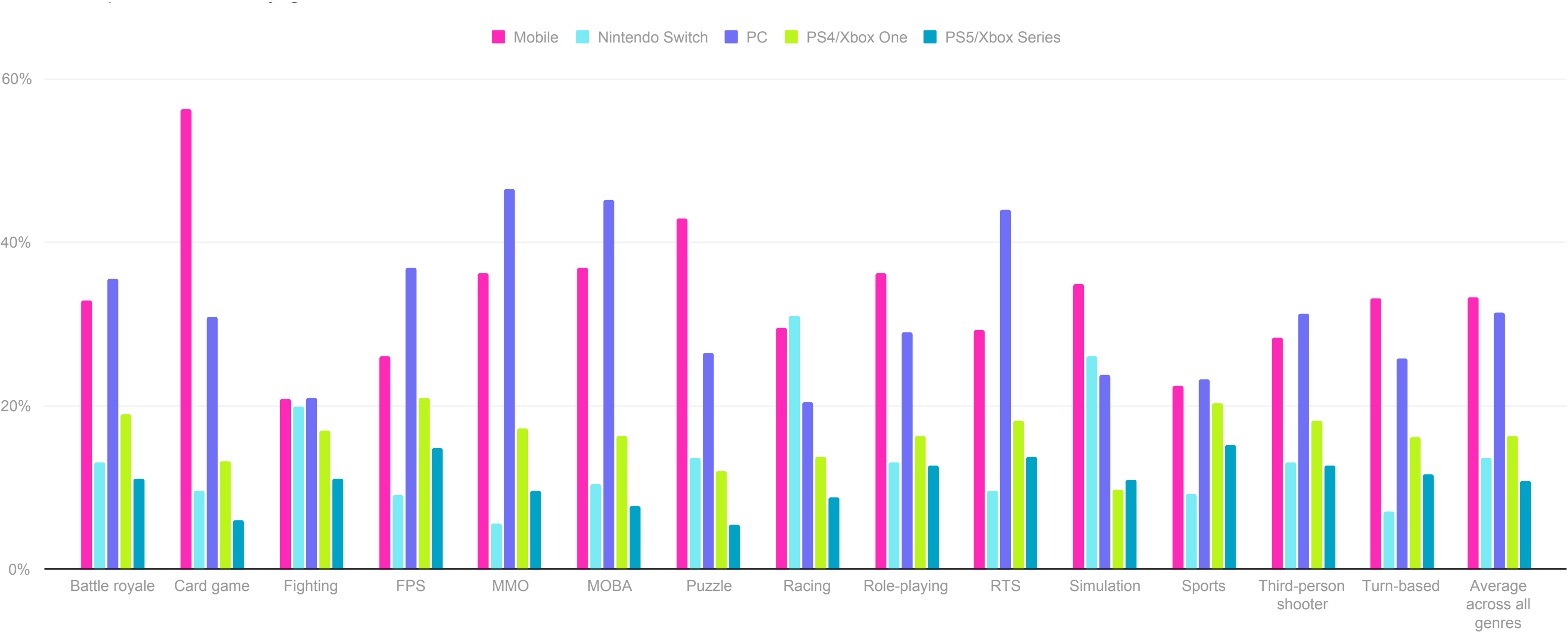
When we compare the popularity results from the same question last year, we see every genre had an increase in engagement based on play time. The largest spike in popularity was with sports games, which rose in frequency of play by both casual and core gamers.

PLATFORMS VS GENRES

Now we know what gamers are playing, what are they playing on?
Defining what genres are most popular on each platform can help you identify where to reach your audience.

MOST GENRES **DON'T**
HAVE A **DOMINANT** PLATFORM

What platforms do gamers pick for each genre they play?



By asking which platforms the multiplayer gamers use to play each of these genres, we notice a few stand out combinations, and we also are able to infer the overall platform preferences at an aggregate level by taking a look at the last “genre” average across all.

The platform of choice per genre are as follows:

- MOBAs, RTS, MMOs, and FPS are most popular on PC
- Puzzle, card, simulation, RPG, and turn-based games are most popular on mobile
- The racing genre has the highest platform relationship with Nintendo Switch™, followed by mobile, and then PlayStation® 4
- Third person shooter, sports, and fighting genres do not have a clear platform preference

*Nintendo Switch is a trademark of Nintendo.

HOW DO MULTIPLAYER GAMERS PLAY?

There's a lot that players think about when choosing multiplayer games that doesn't relate to the actual gameplay, and these things are becoming table-stakes for a market saturated with options.

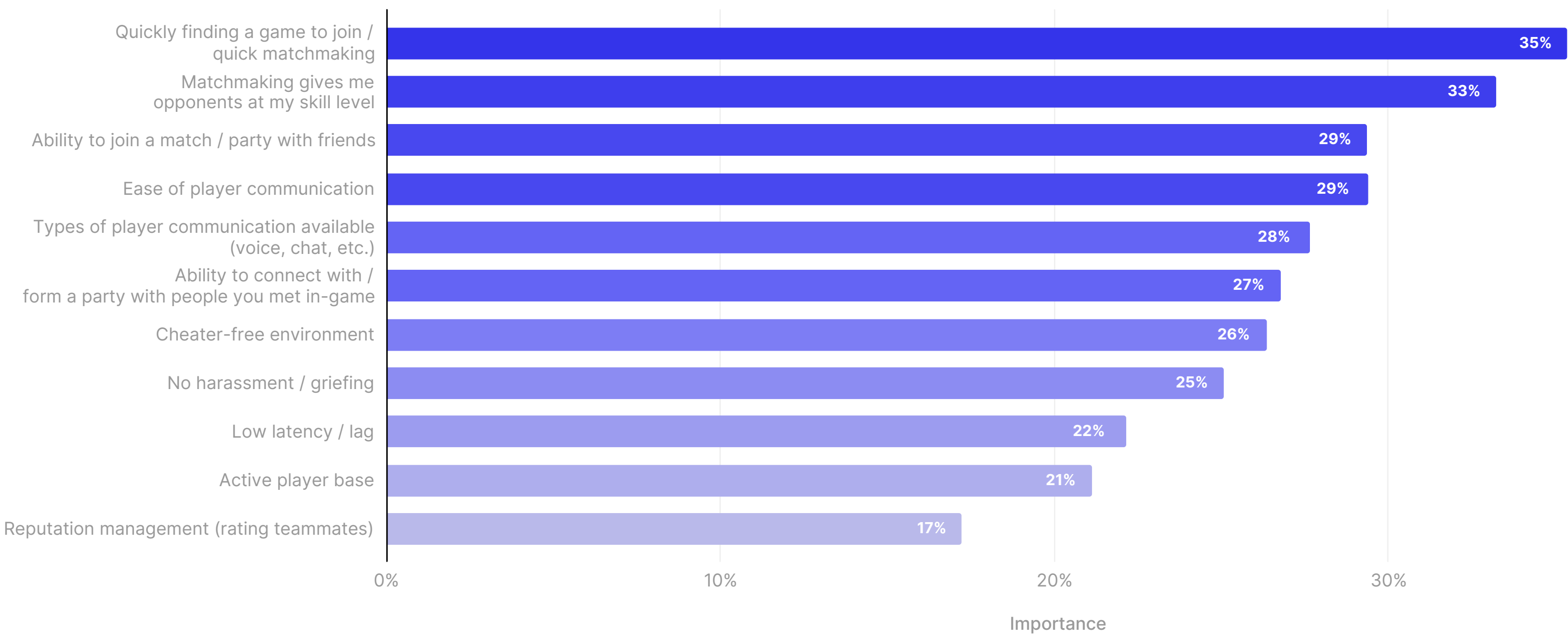
Social elements like in-game chat, community toxicity, and connectivity with friends are highly valued by players alongside the technical elements you'd expect like reduced lag and quick matchmaking.

Let's take a closer look at how our surveyed gamers rated these features.



PERFORMANCE REQUIREMENTS

What features do gamers rank in their top three to ensure an enjoyable multiplayer experience?



Multiplayer gamers' chosen order of importance shows that features around speed and ease of use rank the highest, with anti-toxicity following closely behind.

Smart matchmaking was uncovered as a must for multiplayer gamers, with the top three most important features ranked for the enjoyment of a game being the ability to quickly find a match (35%), finding a match at the right skill level (33%), and being able to join a match with friends (29%).

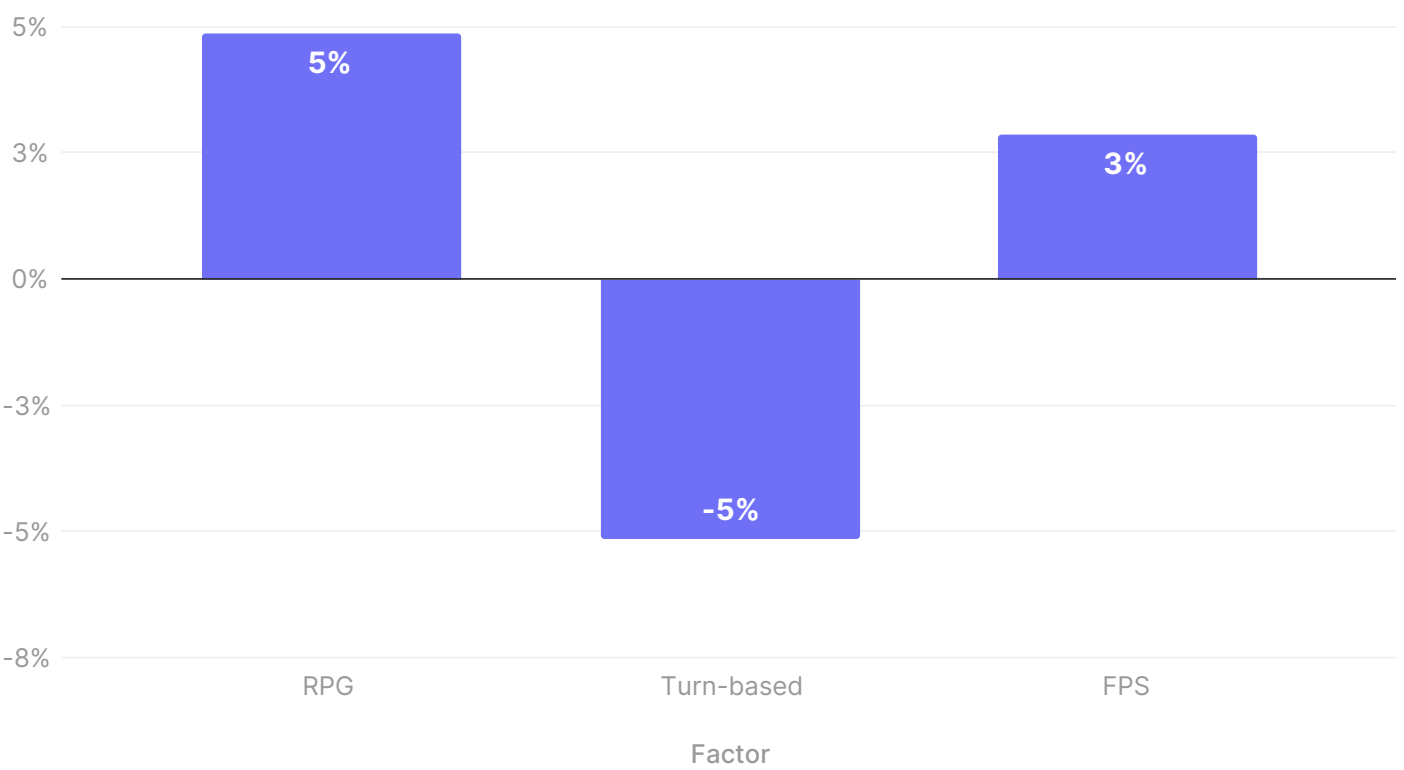
When it comes to the more technical aspects of a gameplay experience, having a lag-free experience and game mechanics that feel new and innovative are also important.

Some of these multiplayer performance issues are of more concern in specific genres, as we see next.

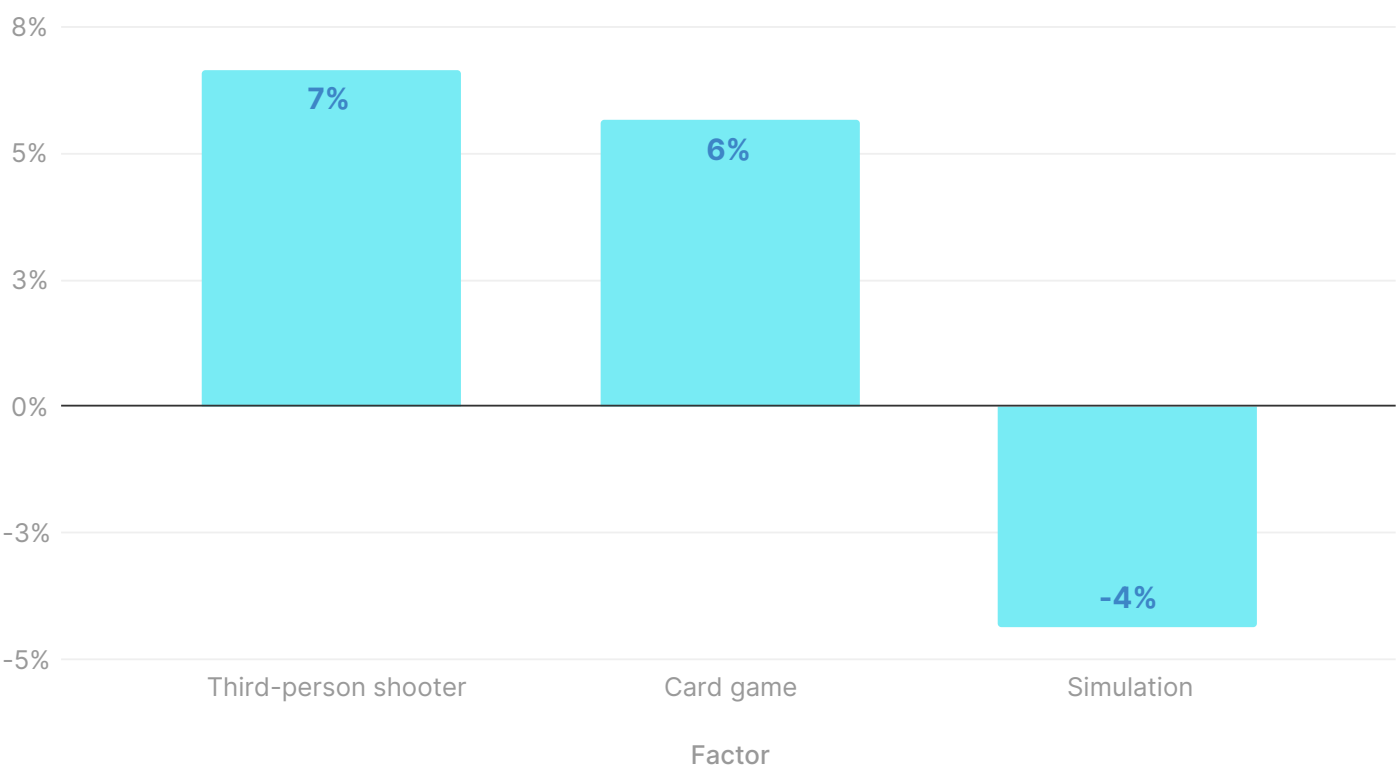
By genre: What features do gamers rank in their top three to ensure an enjoyable multiplayer experience?

Difference between aggregate and genres shown

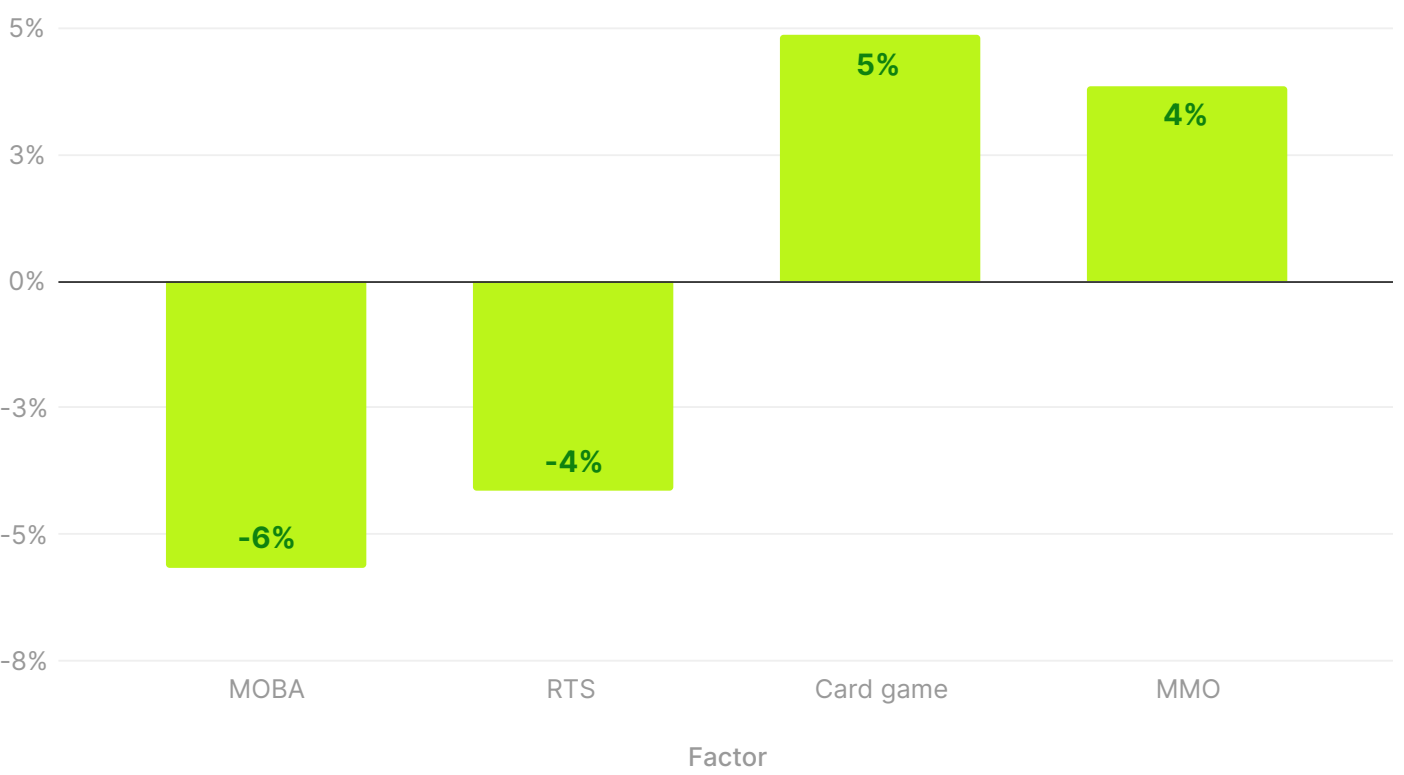
Comparative interest in low latency / lag



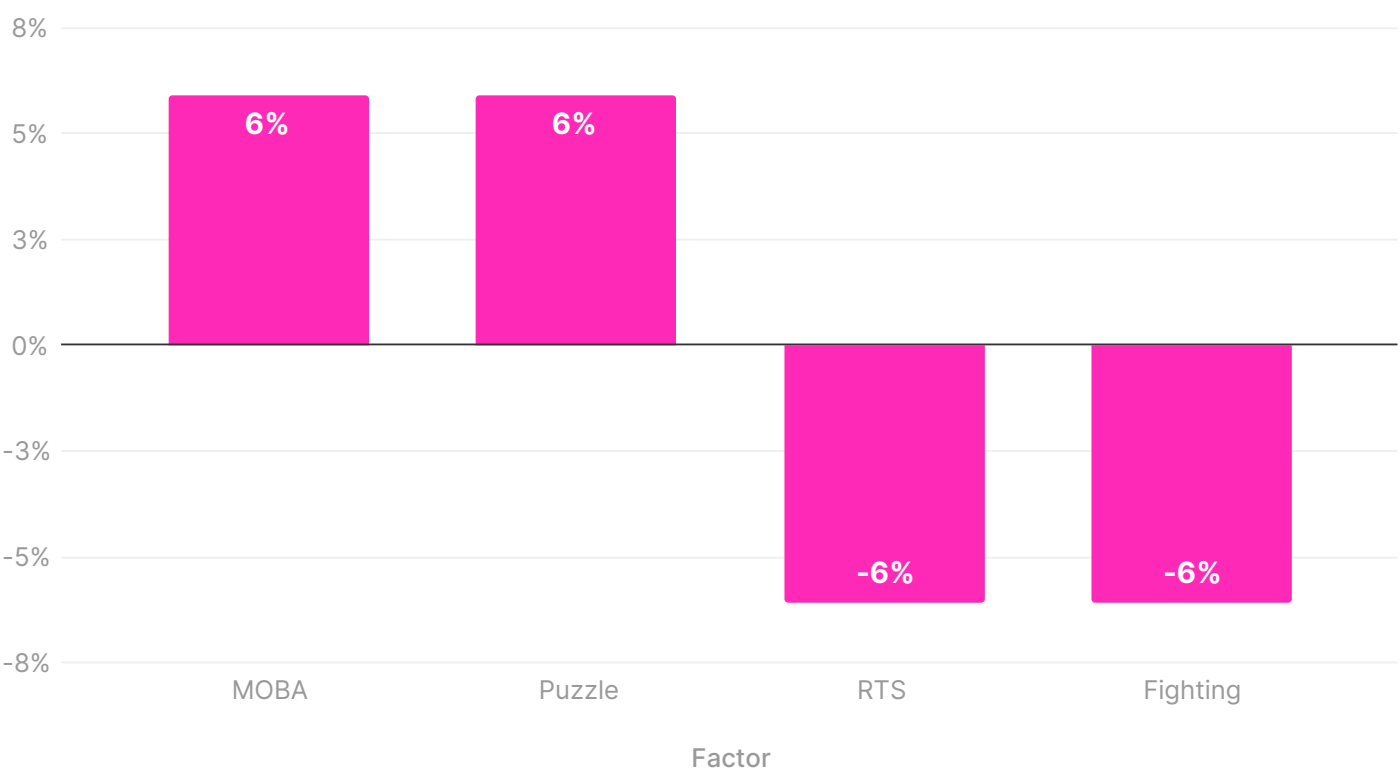
Comparative interest in a cheater-free environment



Comparative interest in an active player base



Comparative interest in no harassment / griefing



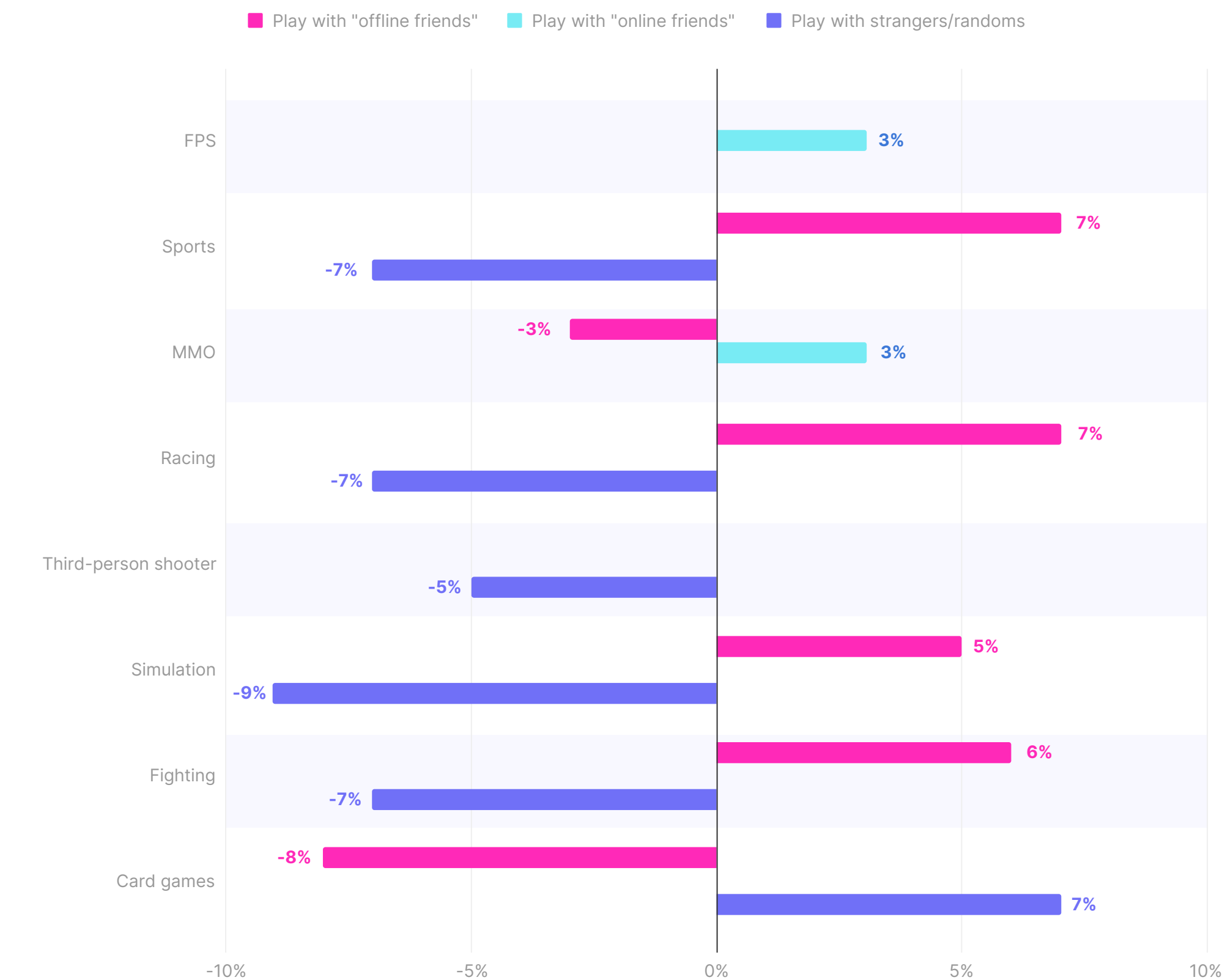
The stand out differences between how performance issues are received by each genre are:

- Low latency is most important for RPG and FPS players, which could be due to the immersive nature and quick response times necessitated by these games.
- Low latency is not as important for players of turn-based games, perhaps due to the success in these games being less dependent on reactionary gameplay.
- A cheater-free gaming experience is highly important for players of third person shooters and card games.
- Active player base is significantly more important for card game and MMO players, where the gameplay is based on large community activity, compared to players of MOBAs or RTS games.
- Harassment-free gameplay experience is important to puzzle and MOBA players. On the other hand, it is less important to players of RTS and fighting games.

**GAMERS WHO PLAY
FIGHTERS ARE THE
LEAST CONCERNED
BY GRIEFERS**

PARTY PREFERENCES

Who do multiplayer gamers prefer to play with in each genre?



Charts shows variance from the average for all genres and only notable differences are shown.

Multiplayer gamers have plenty of choices when it comes to who to play with, and who to play against.

We see here that there's a lot of nuance in who gamers want to play with – whether friends or strangers – depending on the kind of game they're playing.

A few genres lend themselves to playing with strangers more often, though our respondents played most often with offline (real life) or online friends – which speaks to the social power of multiplayer games creating new connections with players around the globe.

- Playing with offline friends is most common in the racing and sports genres, followed by fighting games, which are also genres that often offer local multiplayer or “couch co-op” gameplay modes
- Card games tend to be played more with strangers or random opponents, and were the only genre that indexed higher on playing with strangers than friends
- Playing with online friends is most common with FPS, MMO, third person shooters and simulation genres



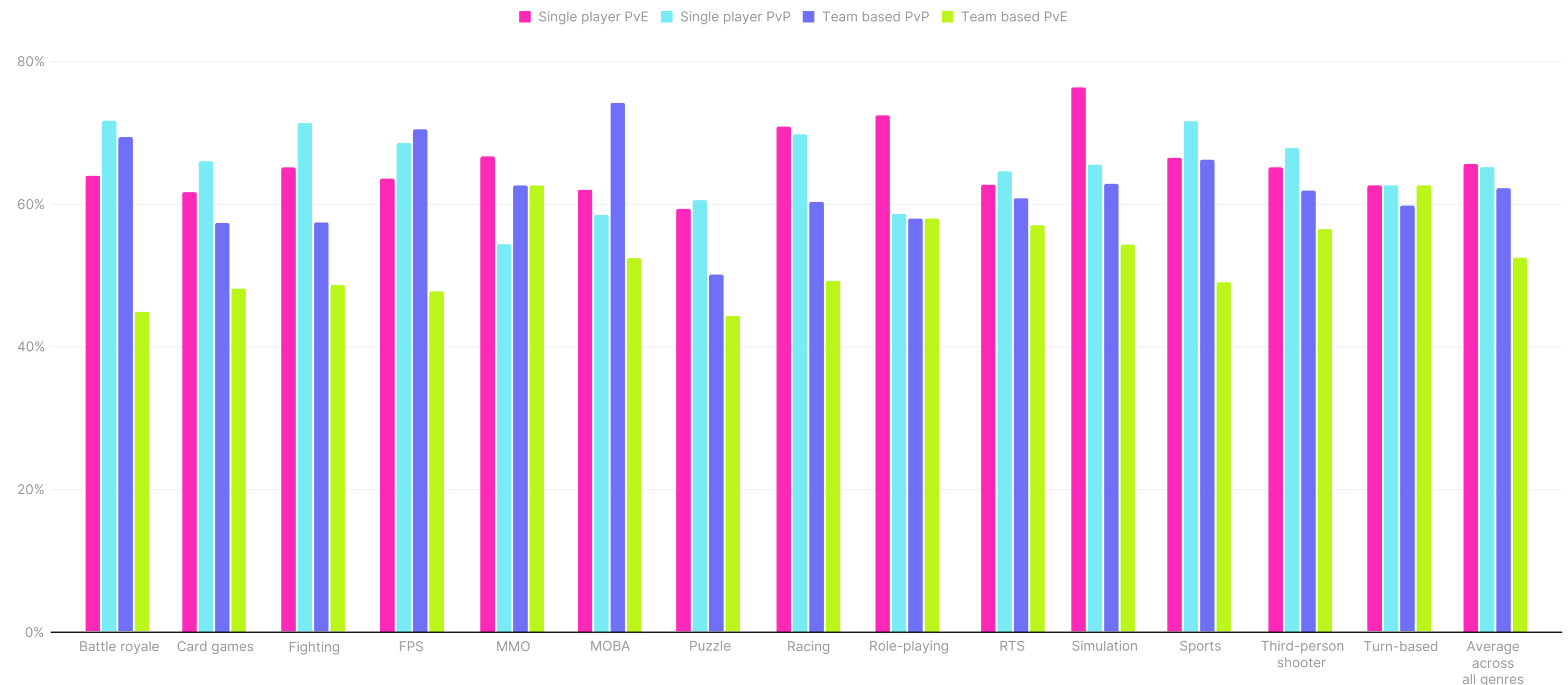
SOLO PVP vs TEAM PVP vs PVE

SINGLE-PLAYER PVP AND PVE ARE
THE MOST POPULAR GAME MODES

Team based PvE is the least popular game mode, although the differences in preference was not as significant for RTS and RPG gamers.

- Survey results show that across almost all the genres, team-based player vs. environment is the least preferable game mode. The genres that indexed the highest on team-based player vs environment modes were turn-based, MMO, and RPG.
- Solo gameplay is the most played game mode for multiplayer gamers in all genres except MOBA and FPS.
- Interestingly, single-player PvE was the most popular on average overall.
- Most of the genres trend towards PvP gameplay modes. Those that leaned towards PvE modes were RPG, simulation, MMO, and RTS.

What online games and game modes did people play in the last week?



GAMERS PREFER TO CREATE VOICE CHAT PARTIES IN-GAME



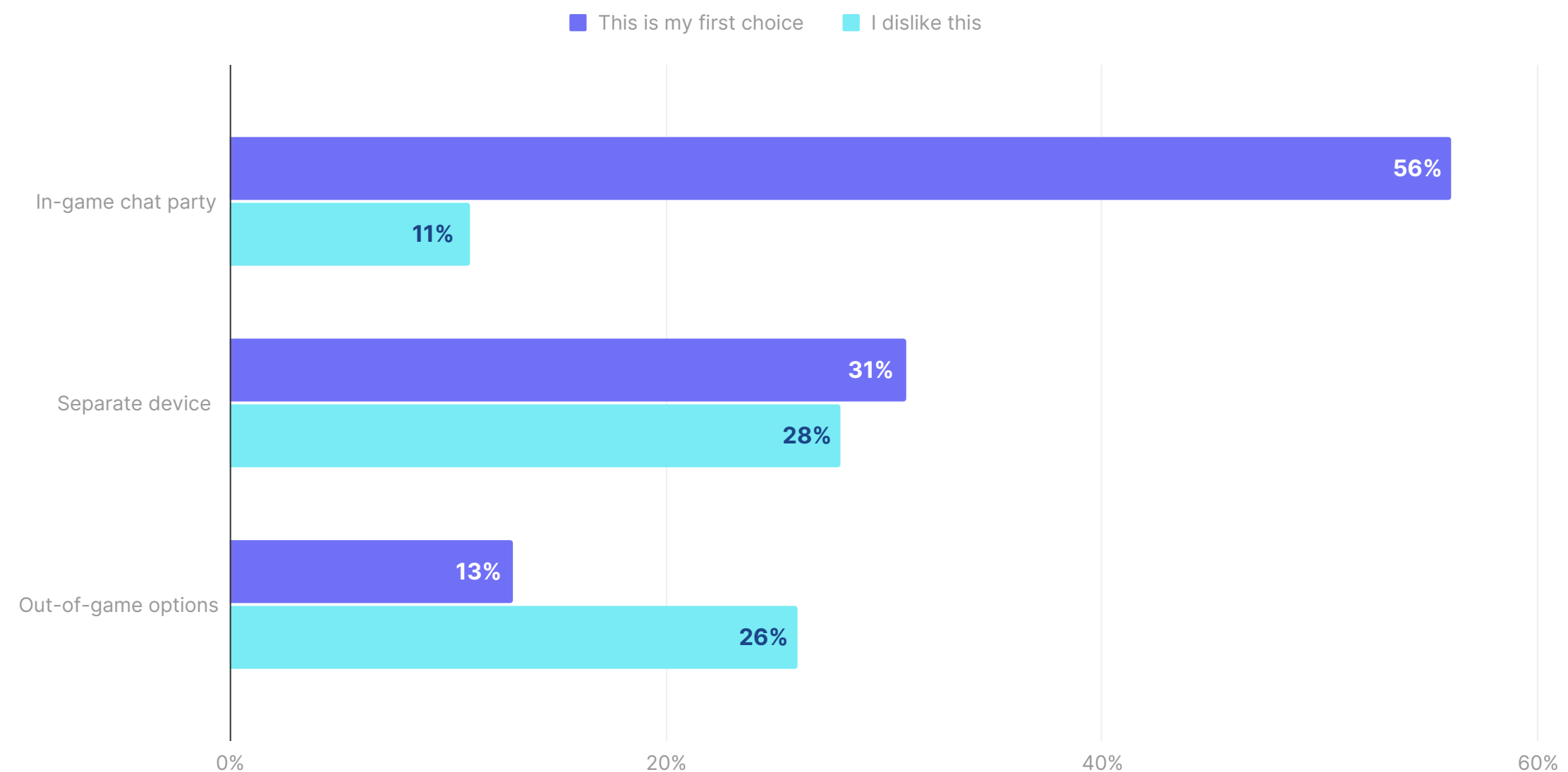
Standoff 2, Axelbolt

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CHAT PARTY TOOLS

Communication is an important aspect of the multiplayer experience, and giving gamers the ability to chat through text or voice with their teammates (or opponents) in-game is preferred over using a separate app or device.

How do multiplayer gamers prefer to talk with the people they're playing with?

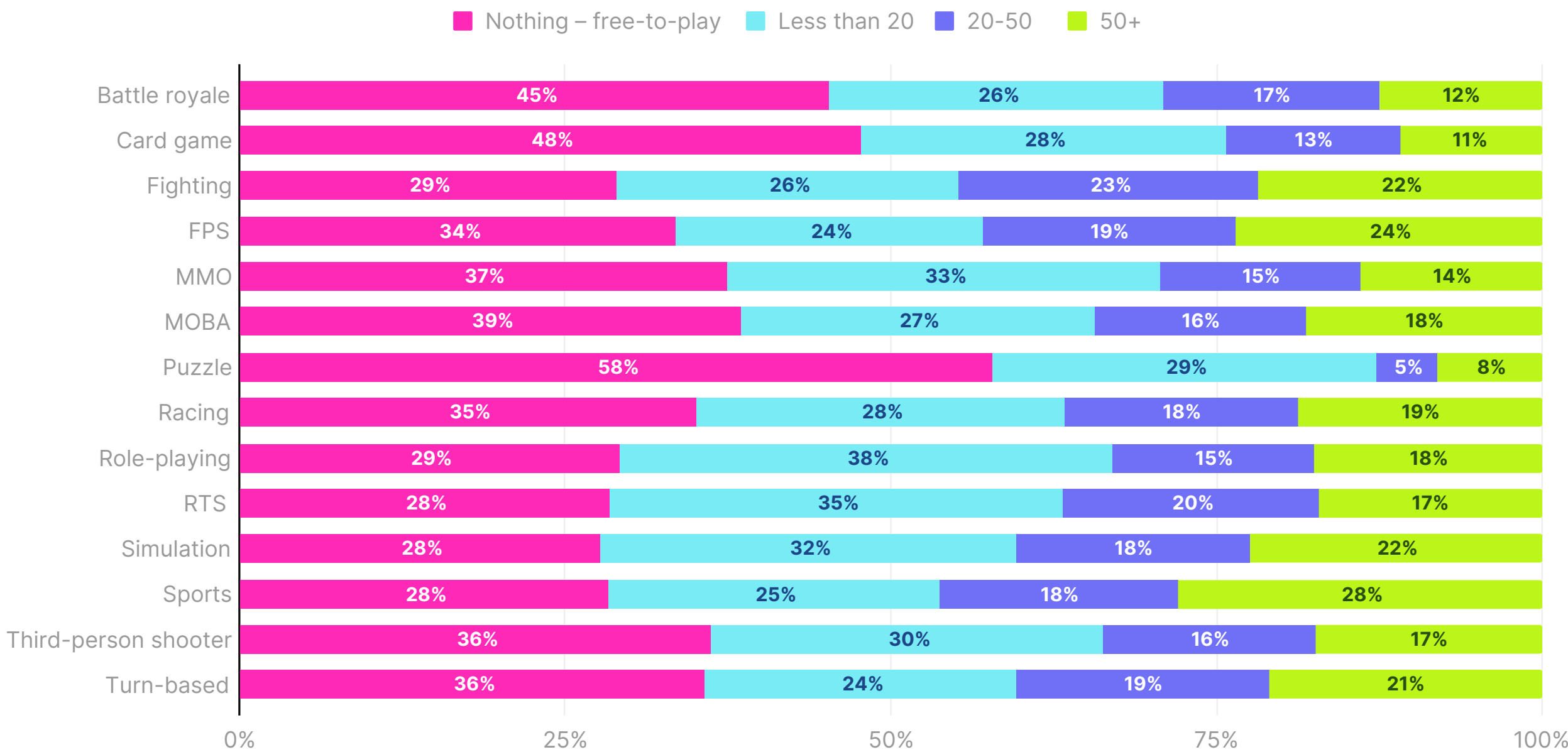


Overall, across all countries surveyed, 56% of respondents prefer creating chat parties with menus inside of their games, while 31% prefer using a separate device or software solution, and only 13% of respondents preferred out of game options. We've omitted the people who were indifferent on chat party preferences from this chart, for brevity.

SPENDING BEHAVIOR, PREMIUM GAMES, AND DLC

Which genres of games are multiplayer gamers happy to pay for?

Price of game last played in USD/GBP or JPY/KRW equivalent



We asked gamers to consider the most recent game they’ve played in a genre, the initial purchase price of that title, and what they have spent on the game since.

Starting off, we reviewed the prevalence of free-to-play games within each genre category.

Puzzle, card games, MOBAs, and battle royales lead the way as most likely to have been free-to-play – genres often supported by in app purchases such as boosters, battlepasses, or cosmetic sales.

The genres that are least likely to be free-to-play are simulation, sports, RTS, fighting, and role-playing, with gamers likely expecting these to be more all-in-one gaming experiences that they’re willing to pay a premium for.

The sports genre in particular is one that releases titles in association with real-life sports organizations and existing intellectual property, the nature of which perhaps does not lend itself to a free-to-play model.

Sports and FPS were the most likely to be full price (between 50–70 USD/GBP). These are also genres that frequently release annual updates and offer in-game purchase options.

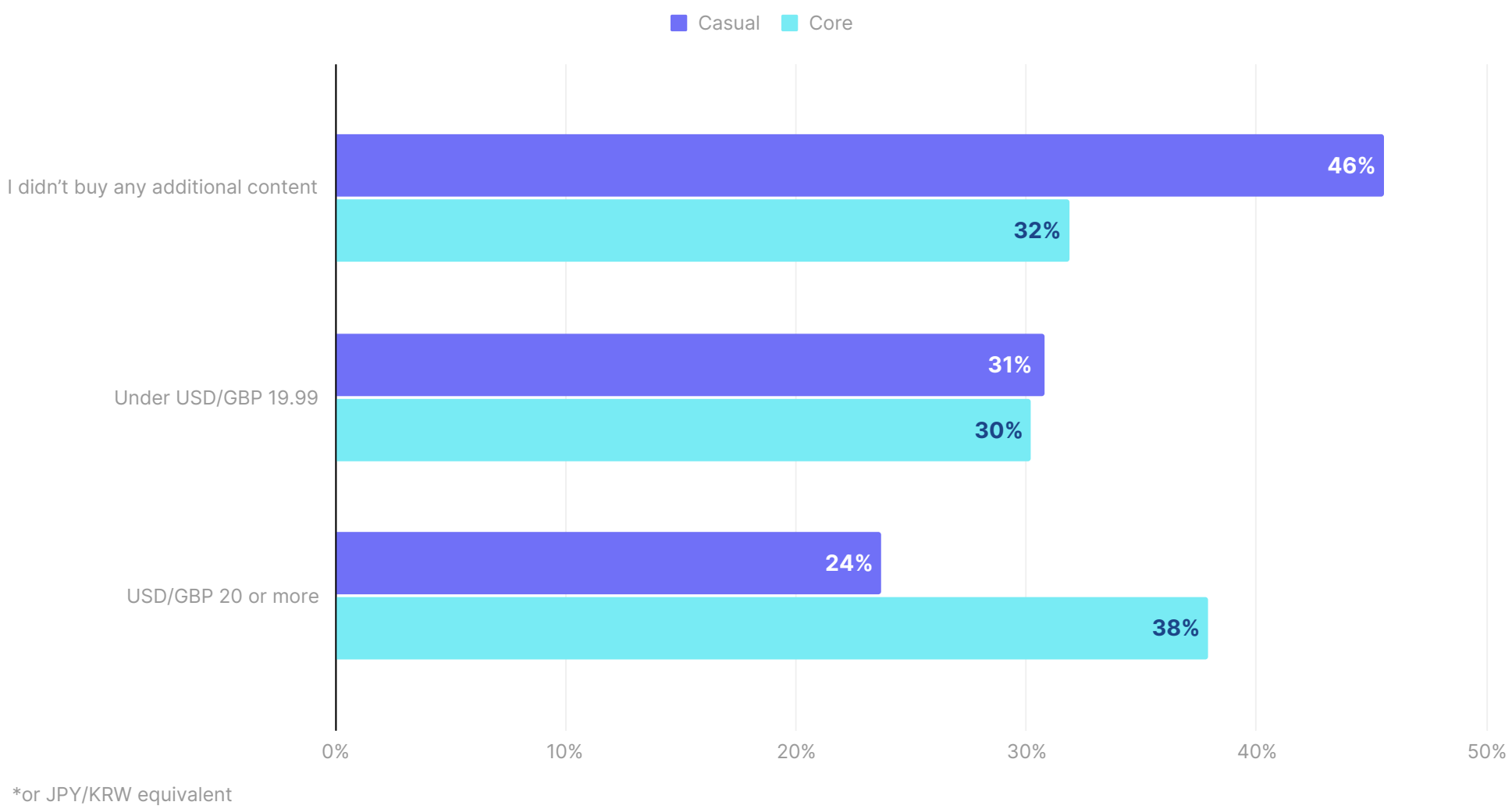
Most of the genres were represented equally in the 20–50 USD/GBP range, with the exception of puzzle games where only 5% of players were happy to pay at that price point.

In the “less than 20 USD/GBP” bucket, we find role-playing games to be the leader with RTS, MMO, and simulation close behind them. At the low end of this group is turn-based, sports, and FPS, which gamers expect to clock in at a higher price point.

But the purchase price isn’t everything in gaming – what about pricing your DLC packages? We asked gamers what amount they’ve spent on DLC in games they’ve played in the last month.



What DLC did multiplayer gamers buy in the last thirty days?



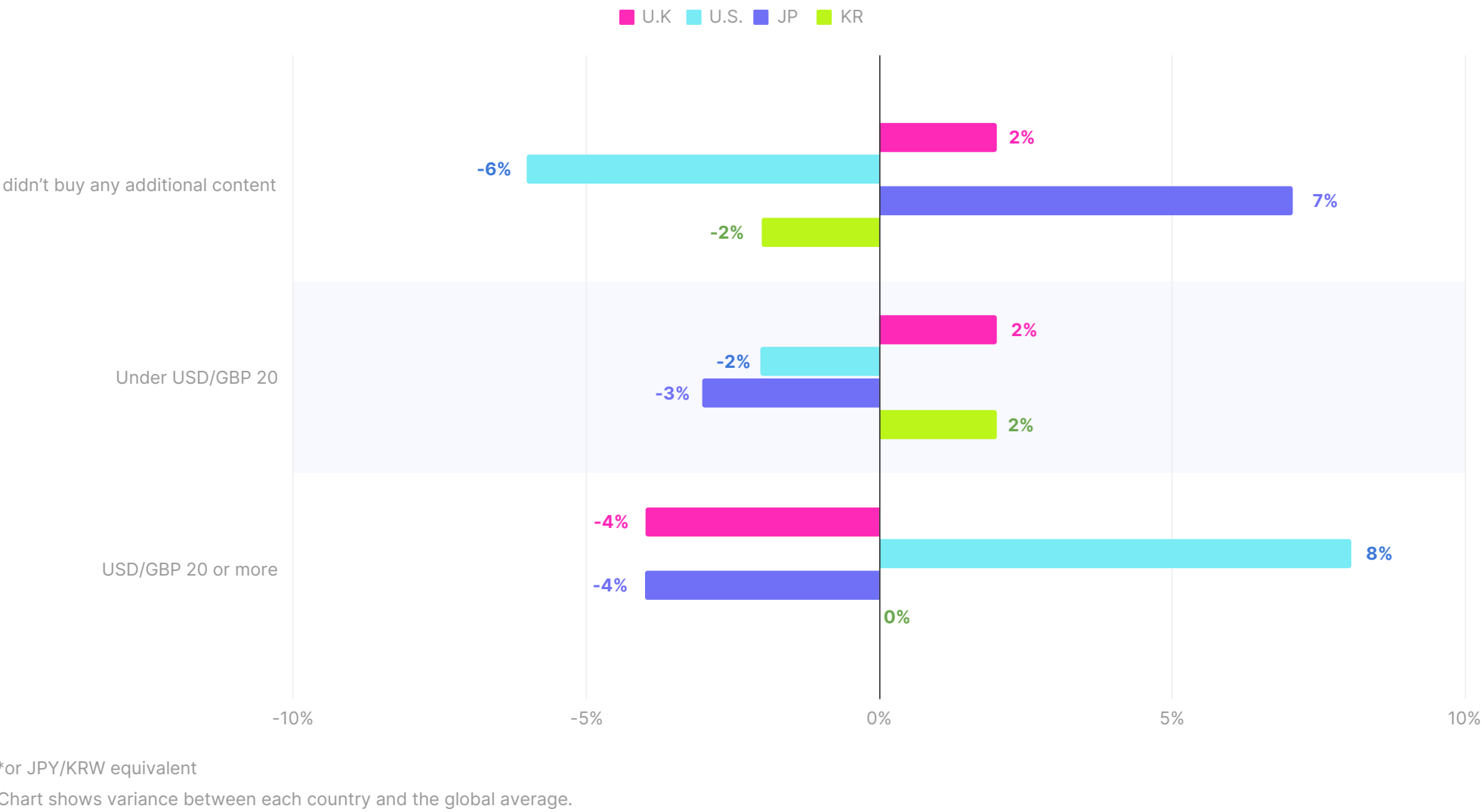
Overall, both casual and core audiences are prepared to spend on additional game content if they enjoy the experience – and, in fact, the amount of gamers spending money on DLC has increased by 5% since 2021.

Only 39% of gamers (down from 44% last year) reported not having spent money on any DLC for their multiplayer games in the last thirty days.

When broken out by casual and core audiences, we see distinct differences in spending behavior. Core gamers that frequent multiplayer games are 58% more likely to spend 20 or more USD/GBP on DLC than their casual counterparts.

Even more surprising is that casual gamers are slightly more likely (1% more) to spend in the sub 20 USD/GBP band than core gamers are.

By region: What DLC did multiplayer gamers buy in the last thirty days?



Geographical differences also play a big role in DLC spending behavior. We found that U.S. respondents were the most likely to purchase downloadable content, and they were also the most likely to spend more than 20 USD/GBP.

We found that the Japanese respondents were the least likely to purchase any DLC, which indicates that the Japanese audience expects a one time purchase for their multiplayer games, and isn't interested in content add-ons. The Korean respondents indexed highest, compared to others, in the 0–20 USD/GBP band.

**JAPANESE GAMERS ARE
LEAST LIKELY TO SPEND ON DLC**

ARE UNITY DEVELOPERS MAKING MULTIPLAYER GAMES?

MULTIPLAYER DEVELOPMENT
IN UNITY SHOWS
CONSISTENT GROWTH
ON MOBILE AND PC

By inspecting packages of development projects and features being used, we can see what games currently being developed in Unity have multiplayer features.

We can see there has been sustained growth in PC and mobile multiplayer game development in Unity since January 2021.

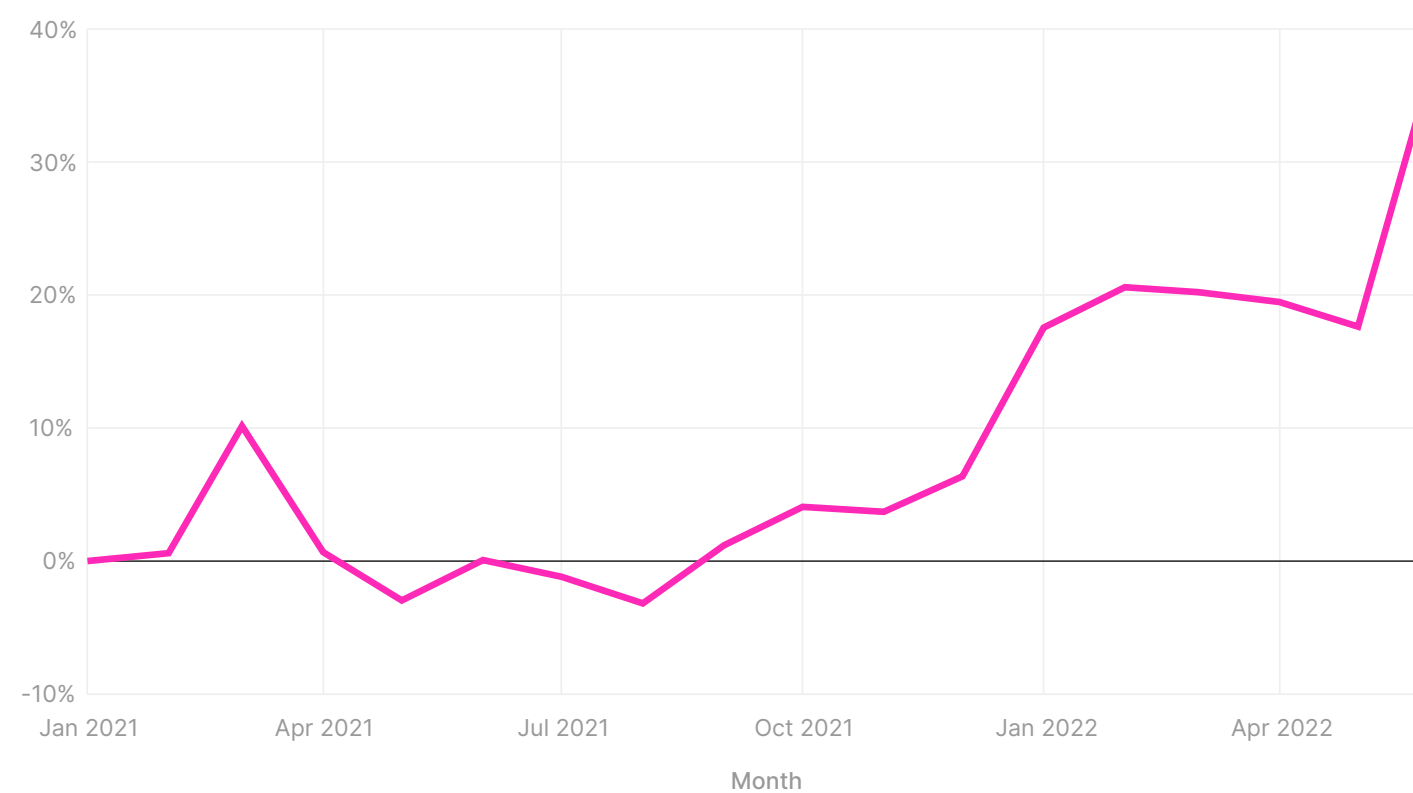
According to internal Unity data, there has been 150% growth in PC multiplayer titles being Made with Unity since January 2021.

Additionally, mobile multiplayer development in the Unity platform has risen by 40% in the same time period.

Overall, developers and studios of all sizes have recognized the growing demand for multiplayer games and are subsequently planning more multiplayer-centric titles for 2022 and beyond.

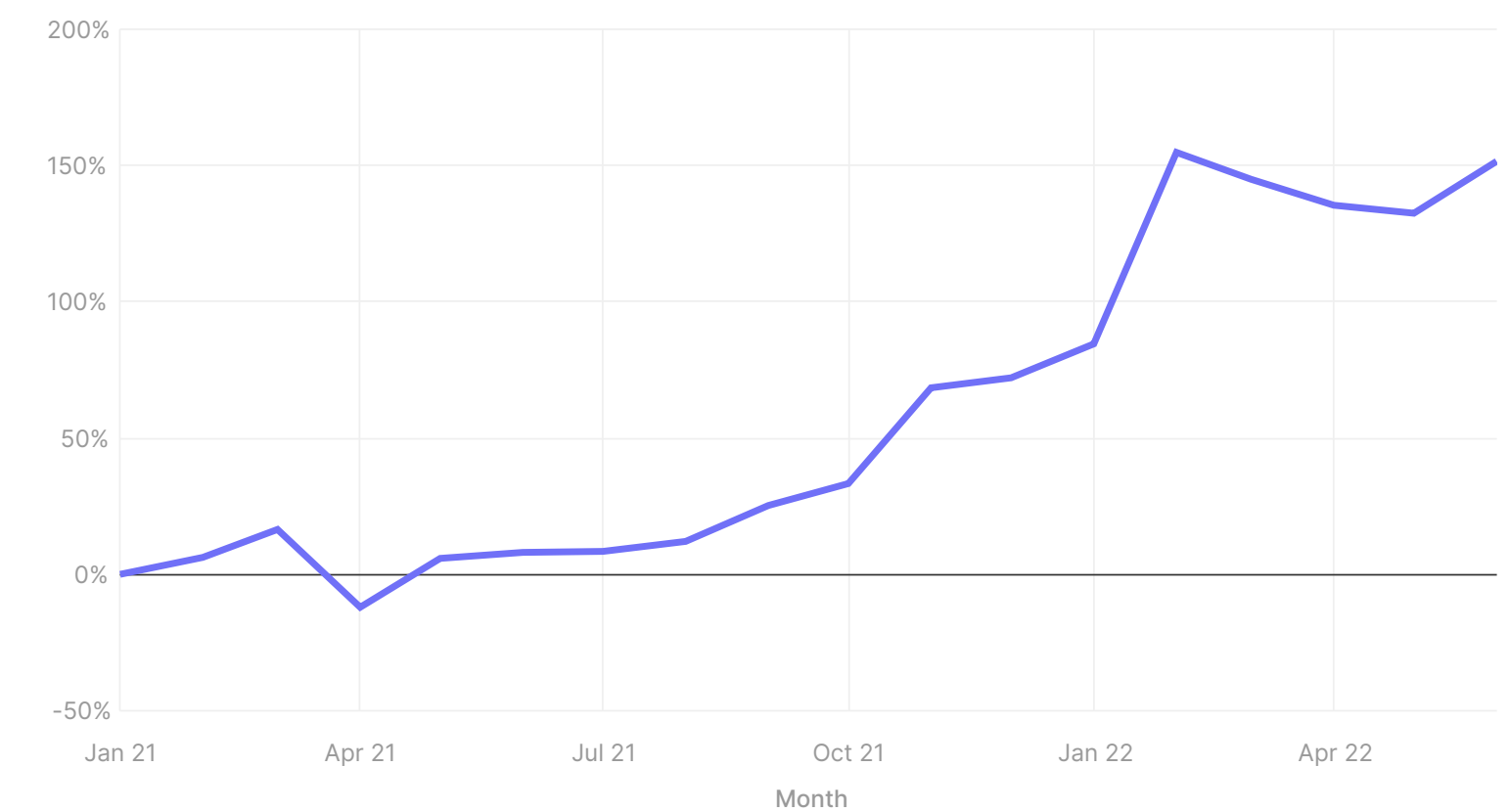
How many mobile multiplayer games are being worked on in Unity each month?

Percentage growth in mobile multiplayer titles being work on in Unity each month



How many PC multiplayer games are being worked on in Unity each month?

Percentage growth in PC multiplayer titles being work on in Unity each month



CONCLUSION: THE MAJOR MOVES IN MULTIPLAYER

The multiplayer gaming industry is evolving fast, but there is always value in pausing to ask players directly what it is they want from their experiences.

Some of the key takeaways we found from gamers worldwide:

Multiplayer demand is strong and continuing to grow

77% of gamers play online, whether with strangers or friends, and there has been a rise in popularity of online play across all genres of 3.3%.

Driving engagement hinges on strong social aspects

When it comes to choosing a new multiplayer game to play, discounting picking their preferred genre, people care about having in-game chat options and their friends with them more than the game being innovative or being lag-free.

Although the spending habits are different, both core and casual audiences will pay for DLC

Multiplayer gamers, core or casual, will pay for post-launch content to keep engaging with games they enjoy.

All genres can find casual and core audiences

We see that core audiences are a bit more engaged with certain multiplayer genres, but this doesn't exclude casual players and there are no genres that have a heavy preference for core or casual gamers.

We'd love to hear your thoughts on this survey, answer any questions, and gain some insight into what else you'd like to know from similar surveys in the future. Feel free to email us at insights@unity3d.com with any thoughts or questions.

ABOUT THE DATA

Data collected by Unity Technologies in Q3 2021 and again Q3 2022 through an online survey of multiplayer gamers in the U.S., U.K, Korea, and Japan.

In each country, we focused on two categories of multiplayer gamers, casual and core. Casual gamers are defined in the following results as gamers who spend at least two hours gaming per week, of which at least 30 minutes is playing multiplayer.

Core gamers, on the other hand, spend at least four hours per week playing multiplayer games in any combination of the following traditionally multiplayer genres: Shooter (battle royale, FPS, third person shooter), MOBA, MMO, racing, sports, or fighting.

We collected responses from about ~1500 gamers, with our data set being about 50% core gamers, and 50% casual gamers.

Additionally, multiplayer data has been analyzed from Unity's live gaming solutions to provide insight into genre activity by time of day and by location. All internal data has been aggregated and anonymized in order to protect the privacy of our partners' and their data.

ABOUT UNITY

Unity (NYSE: U) is the world's leading platform for creating and operating real-time 3D (RT3D) content. Creators, ranging from game developers to artists,architects, automotive designers, filmmakers, and others, use Unity to make their imaginations come to life.

Unity's platform provides a comprehensive set of software solutions to create, run and monetize interactive, real-time 2D and 3D content for mobile phones, tablets, PCs, consoles, and augmented and virtual reality devices.

The company's 1,800+ person research and development team keeps Unity at the forefront of development by working alongside partners to ensure optimized support for the latest releases and platforms. Apps developed by Unity creators have been downloaded more than five billion times per month in 2020.

For support in building and optimizing your multiplayer experience, check out [Unity Gaming Services](#).

ACCELERATE YOUR MULTIPLAYER DEVELOPMENT

Unity’s Multiplayer Suite provides a wide range of solutions you need to build and operate your game, so you can keep your time to market down while focusing on gameplay.

Our multiplayer products work with any game engine, on all platforms, and can support your game in any region that you launch in.

Learn more

PREMIUM INSIGHT, STRAIGHT TO YOUR INBOX

Sign up to receive workshops, e-books, real-world insight, and more from around the world of Unity Gaming Services.

Sign up

