



Google Stadia

Initial impact

UK national survey
Research report

March 2019

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Introduction

Google has announced a new gaming platform called 'Stadia', to be launched in US, UK and the rest of Europe in 2019. Many have called it the Netflix of gaming.

It is a differentiating and potentially disruptive proposition in the gaming market:

- It allows users to play high end video games instantly on a phone, tablet, PC or TV
- Games will be streamed rather than downloaded or purchased on a disc, negating the need for a dedicated console
- It has a direct connection with YouTube, allowing users to broadcast directly to the platform with a press of button on the dedicated controller
- The service will be subscription based

This report looks at the initial impact of the reveal based on the results of a UK survey, representative of UK demographics.



Method and sample

- Online panel survey using the Harris 24 poll service
- 2,146 interviews
- 3-minute survey, fieldwork 21-24 March 2019
- Sample is weighted to national demographics by gender, age and region
- 16-64s interviewed with quotas set by gender/age
see table below

males	900
females	1,246
16-24	276
25-34	461
35-44	492
45-54	437
55-64	480

unweighted bases

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Executive summary – top 5 conclusions

1

Stadia has made an **impressive splash** – within a week of its reveal, 4 in 10 (39%) of the UK public are aware of it, with over 1 in 10 (11%) saying they are very familiar. Over a third of the higher spending gamer community are very familiar with it already. This is a **solid foundation** at this early stage.

2

After describing the service, we see 1 in 3 (34%) saying they are **interested in subscribing**, peaking among console gamers (58%) and higher spenders on gaming (75%). Interest has a male bias (43% versus 25% female) and peaks among 25-34s (56%).

3

The monthly fee is the **core barrier** right now. An additional core barrier among console gamers is the rent rather than own aspect. These reservations are stronger than *technical* barriers (like lag and quality) as it stands, which may become more prevalent as details of Stadia's actual performance in peoples' homes becomes more readily available.

4

While pricing details are yet to be revealed, the expectation is a monthly fee of around **£12 per month**.

5

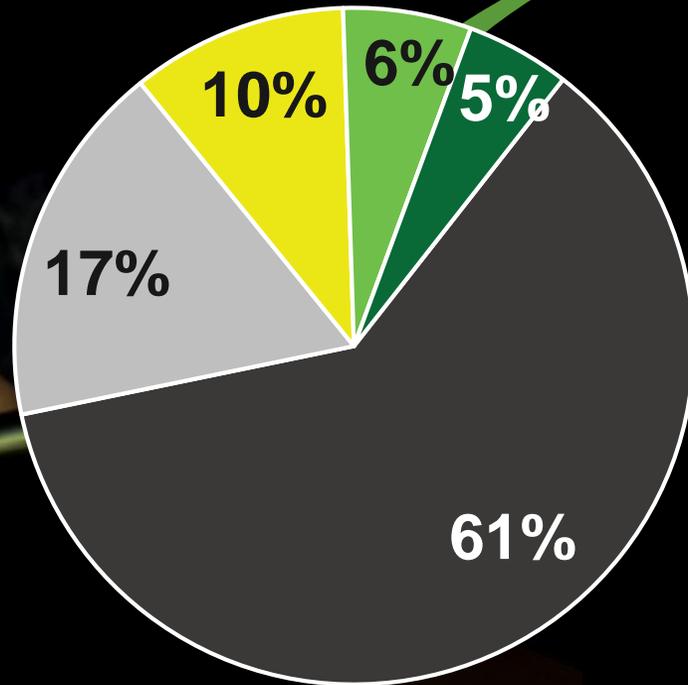
While console gamers are among the most interested in Stadia, they remain strongly **loyal to the idea of the console**. There is more evidence to show loyalty to the console than evidence to show a migration from console to a Stadia subscription.

Within a week of the reveal, we see that 2 in 5 of the UK public are aware of Stadia, with over 1 in 10 very familiar



Familiarity with Stadia

base all UK, 2,146



39% are aware
11% at least very familiar

% at least very familiar

Total UK 11%

Males 17%

Females 5%

16-24 10%

25-34 27%

35-44 13%

45-54 3%

55-64 1%

All gamers 15%

Console gamers 20%

PC gamers 14%

Mobile gamers 9%

Higher spenders 36%

£100+ every 6m

Strong familiarity with Stadia skews male, to 25-34s and is strongest of all among higher spenders.

Q. Recently Google has announced the launch of a new digital gaming platform called "Stadia". How familiar, if at all, are you with this news?

1 in 3 of the public are interested in Stadia – this increases to a majority among console gamers and higher spenders

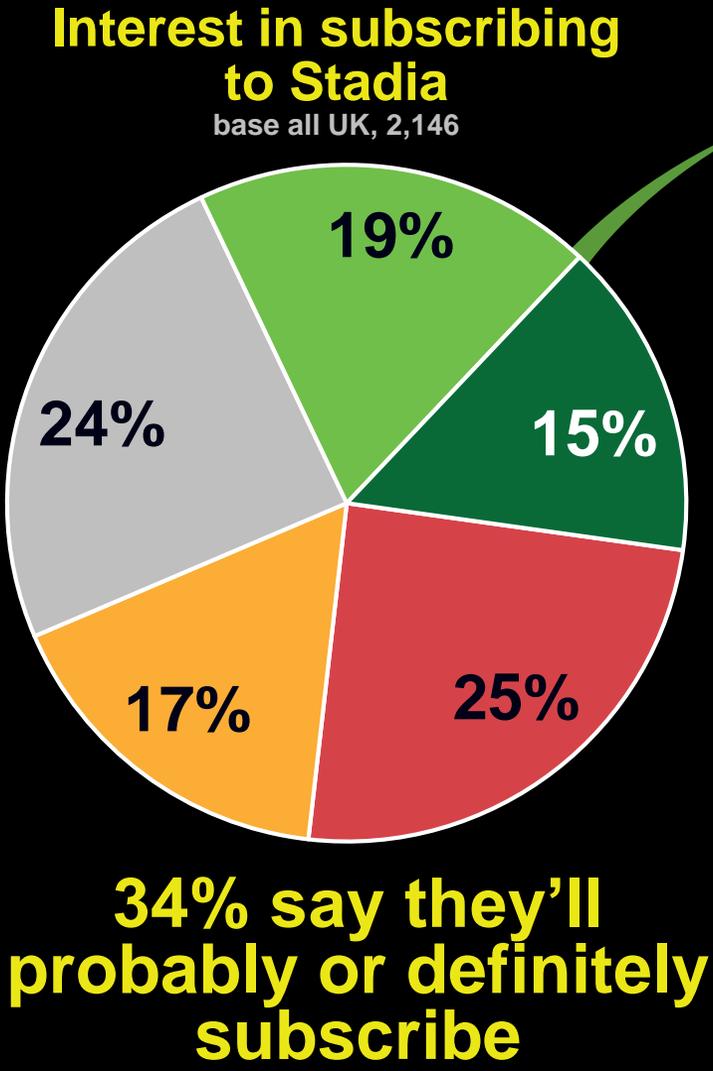
Description of Stadia used in the survey:

“Google Stadia will allow users to play video games instantly on a phone, tablet, PC, or TV.

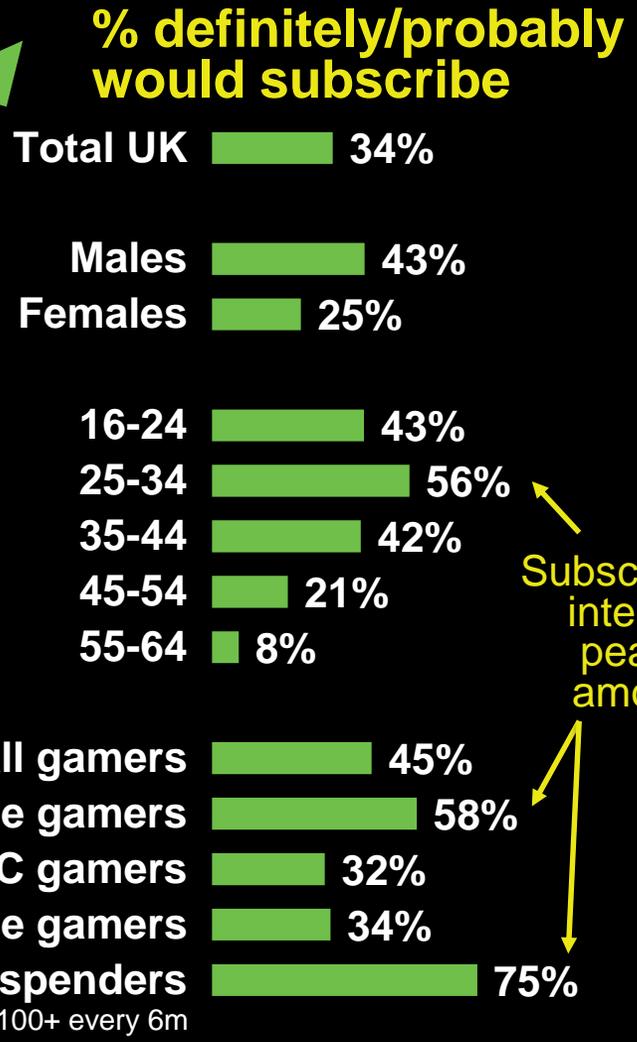
Games (including better-than-current-console-quality games) will be streamed rather than downloaded or purchased on a disc.

A Stadia controller gamepad will enable you to capture and share gaming directly on YouTube.

The service will be available upon the payment of a monthly fee.”

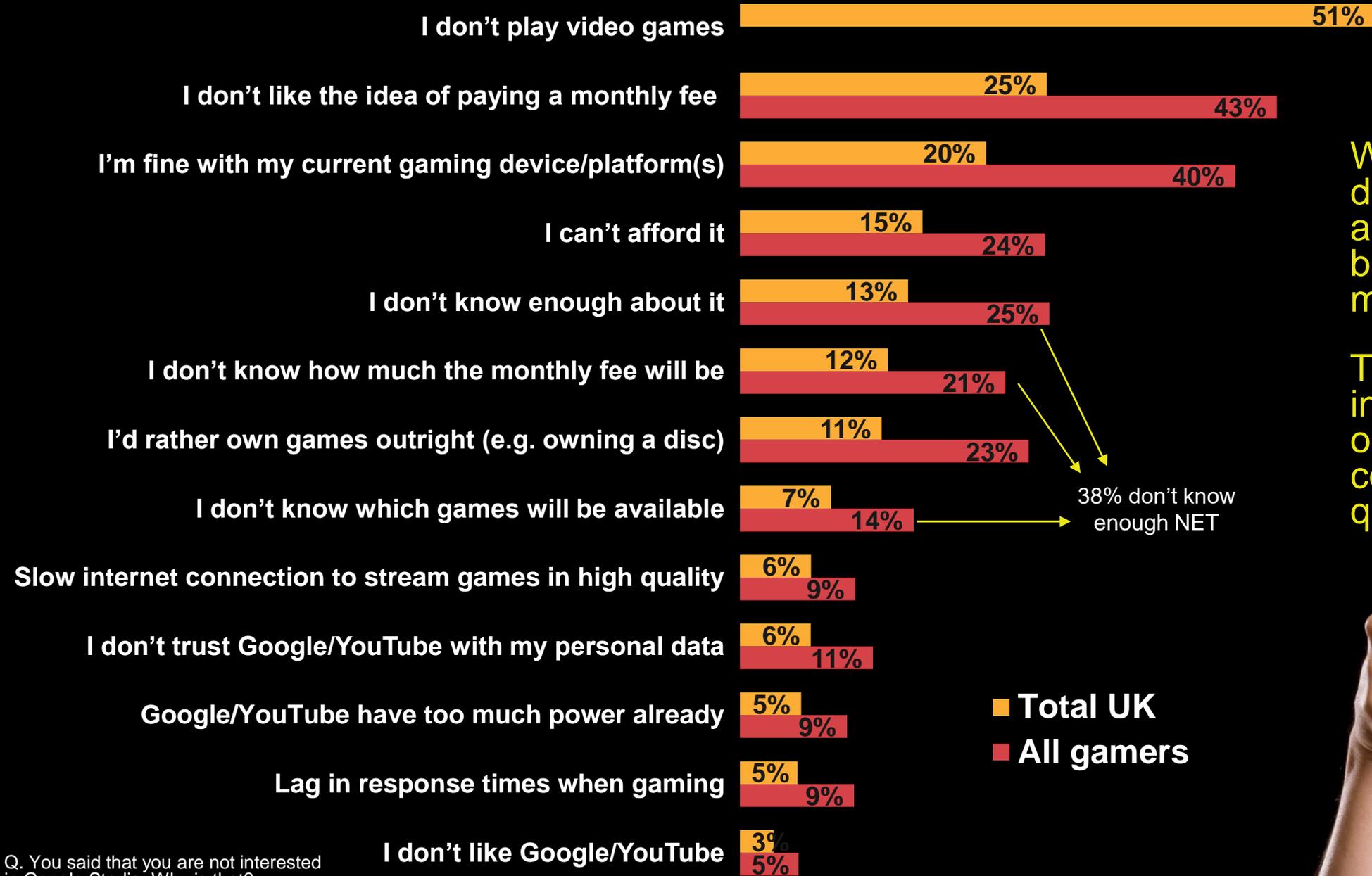


- I definitely would not
- I probably would not
- Might or might not
- I probably would
- I definitely would



Q. Based on the description above, how interested, if at all, would be in purchasing a subscription to Google Stadia?

Reasons for not being interested in Stadia

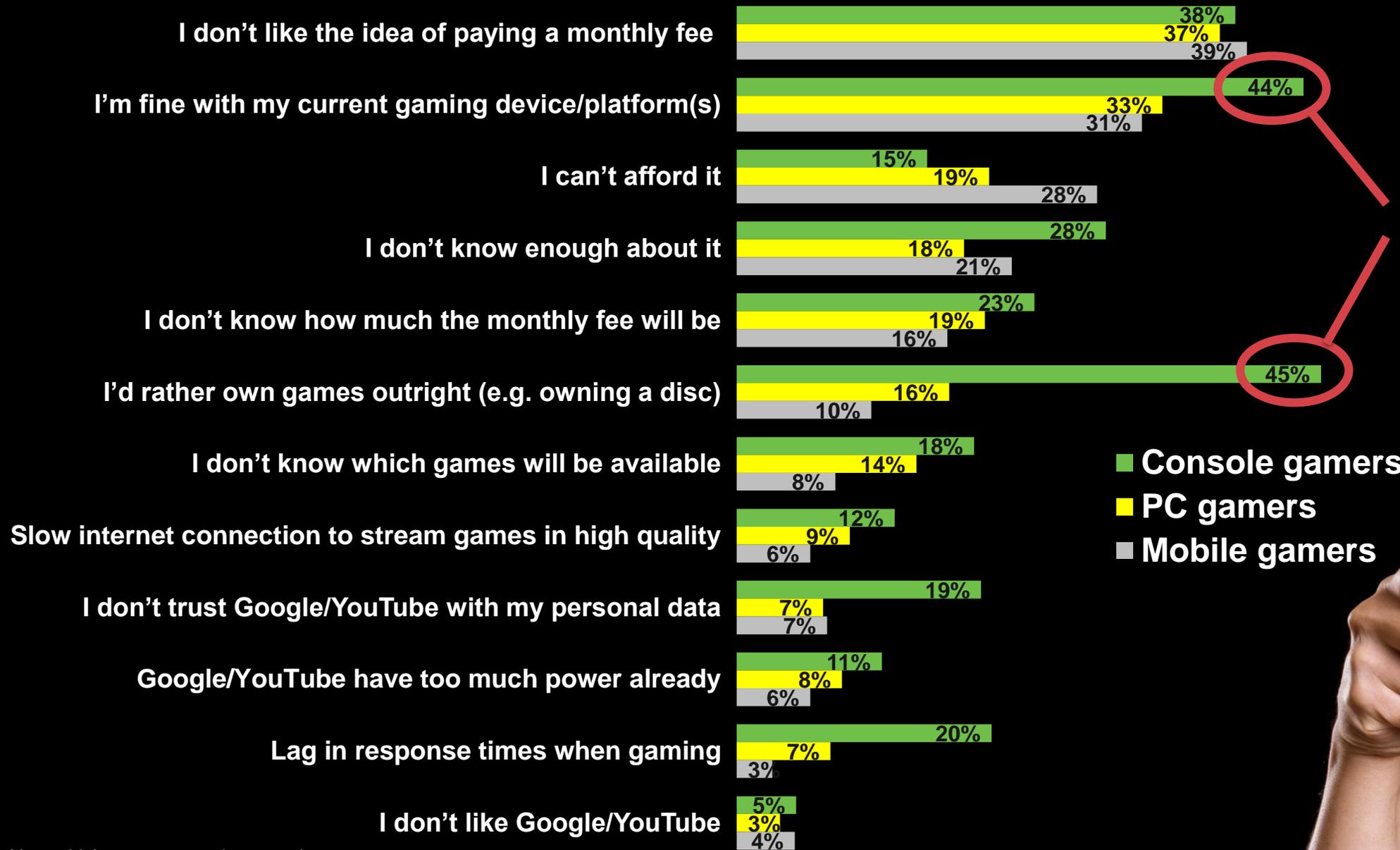


While many need more details on Stadia to form an opinion, the core barrier as it stands is a monthly fee.

The fee and lack of information are outweighing technical concerns (like lag and quality) right now.



Reasons for not being interested in Stadia by gamer type



Console gamers have stronger reservations about Stadia, particularly around renting (rather than owning)

- Console gamers
- PC gamers
- Mobile gamers



Q. You said that you are not interested in Google Stadia. Why is that?

The *expected* monthly fee is around £12, but those who are interested expect it to be substantially higher

Stadia subscription, expected monthly fee

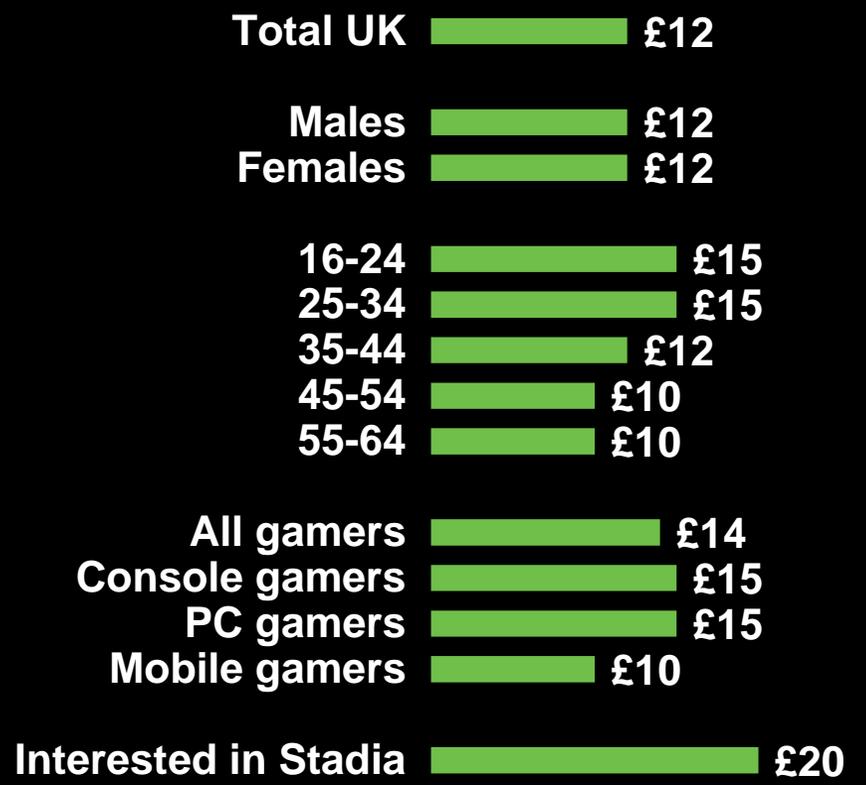
base all UK, 2,146

median = £12 per month



expect the monthly fee to be...

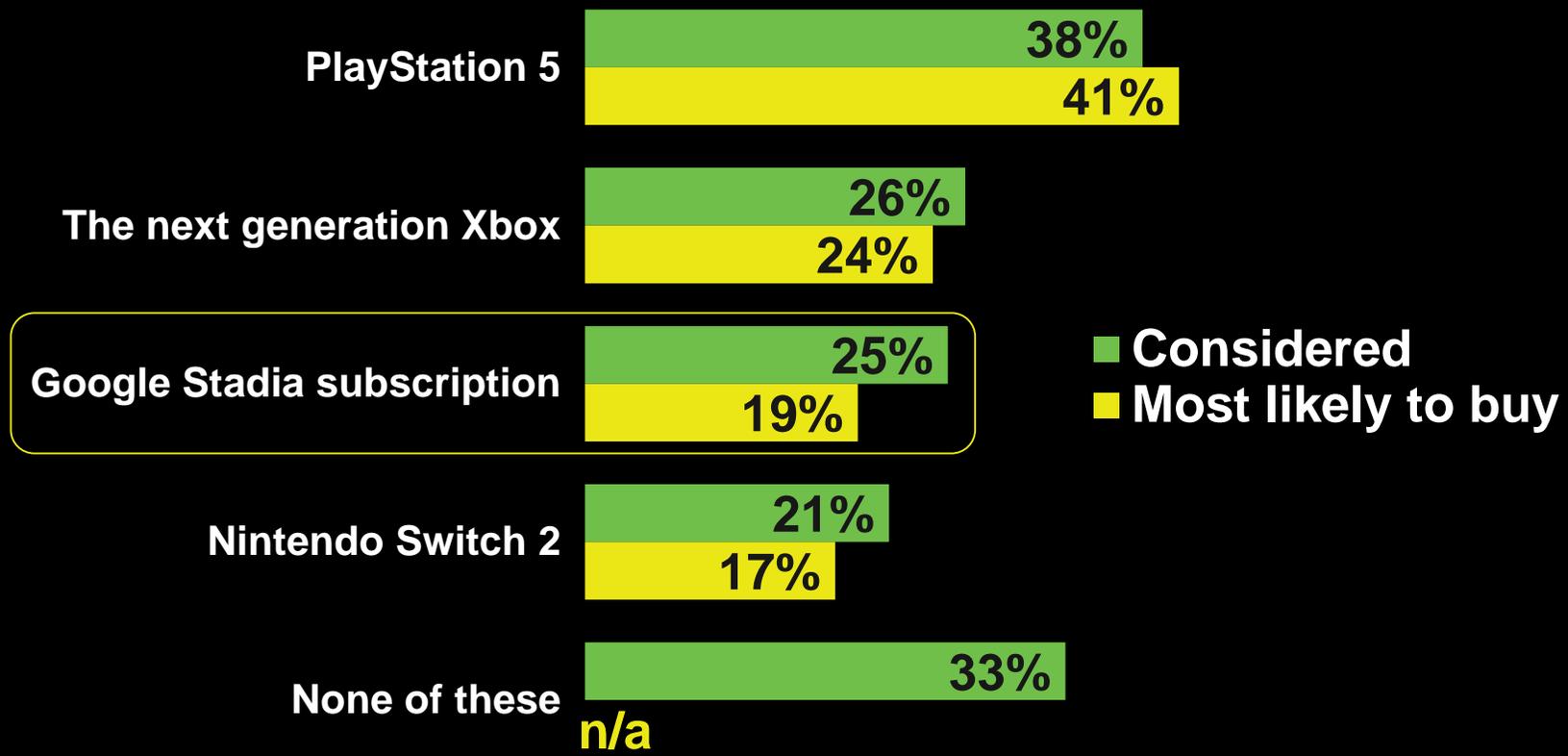
Median expected fee by sub group



When asked for consideration of Stadia against the next generation of consoles, Stadia performs well, just behind the next Xbox and ahead of the next Switch

Consideration of Stadia vs. other upcoming platforms

base all UK, 2,146



Q. Now imagine that you were to buy a new game console, which of the following would you consider buying?
Q. And which one of the following would you be most likely to buy?

Commitment to buying into Stadia is most pronounced among higher gaming spenders and PC gamers, with console owners being least committed

Most likely buy	Total	Male	Female	16-24	25-34	35-44	45-54	55-64	Gamers	Console gamers	PC gamers	Mobile gamers	Higher spenders
PlayStation 5	41%	45%	35%	42%	43%	39%	38%	41%	42%	48%	34%	37%	42%
Next Xbox	24%	26%	21%	26%	19%	22%	29%	27%	24%	28%	23%	19%	23%
Google Stadia	19%	19%	18%	12%	21%	21%	19%	20%	18%	14%	25%	20%	25%
Switch 2	17%	10%	26%	20%	17%	18%	15%	12%	17%	10%	18%	24%	11%

5% points or more greater than total

Console gamers remain a great deal more fixed and loyal on another console rather than Stadia as it stands



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