

Survey Created by David Pinilla

Analysis prepared by Scott Dunphy

Thanks to all the folks who promoted the survey!

Results and Analysis of the RPG Podcast Listeners Survey 2010

Purpose

The purpose of this survey is to gather data on table-top RPG podcast listeners, their listening habits, and their gaming habits. In addition to providing valuable feedback on the listening audience, these gamers also represent a sample of the broader table-top RPG population. Hopefully the entire table-top RPG community will find these results useful and relevant.

It is not the intent of the survey to promote any particular podcast or game system. Any perceived bias towards or against any podcast or game system is unintentional. While the results may have favored the shows (and possibly the related systems) that promoted the survey, all RPG podcasters were asked and encouraged to promote the survey. Since there is no budget associated with this survey, promotion through podcasts and associated websites is the most efficient and effective method to gather a significant sample size.

2010 Survey Questions: <http://rpgpolls.com/index.php?/fill/survey/14>

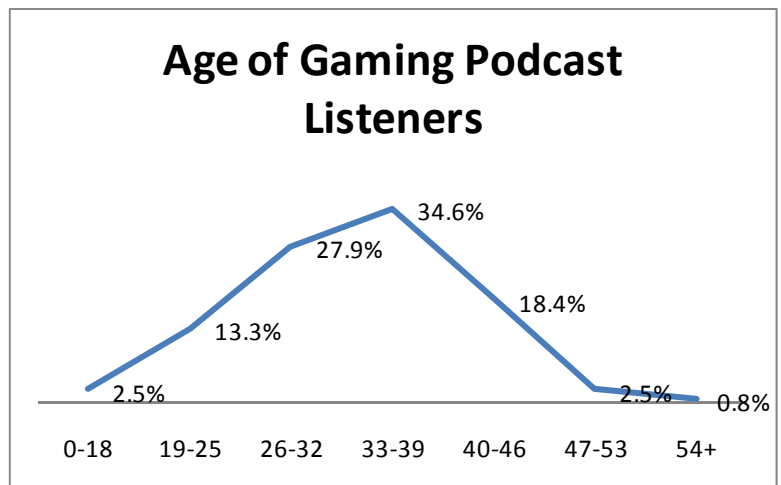
2009 Survey Results: http://storysttick.spookyouthouse.com/files/Podcast_Listener_Survey_Results_and_Analysis_May_09.pdf

Who Are the Listeners?

This year, 492 surveys were completed (down some from 549 last year). Since state-wide polls for US political races use a sample size of at 500 or greater, this is a very significant sample of the entire table-top gamer population.

This year the survey asked listeners to select their age range—see the chart to the right. The vast majority of listeners—62.5%—are between the ages of 26 and 39.

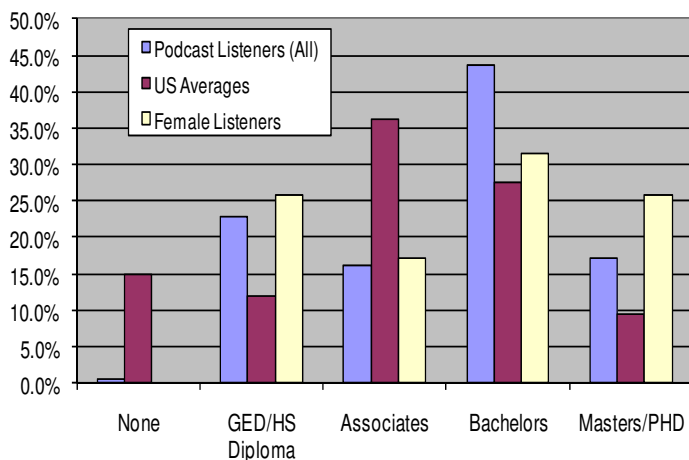
55% of survey respondents (aka listeners) are married this is slight increase from 53% last year and it will be interesting to see if this trend continues. Only 35 respondents (7.1%) were female, but this is still a large enough sample to glean some information on women’s listening and gaming habits compared to men’s.



Listeners were also asked about their education, income, and location. Location will largely be dealt with in a separate product—a Google Earth file—but most of the respondents are from the US. None of the data is considered separately by location as that was not the intent of the survey. Education and income levels are compared against US averages despite the fact that many participants are not from the US. Furthermore, these US averages are from 2008 (same as last year) as more recent information was not available.

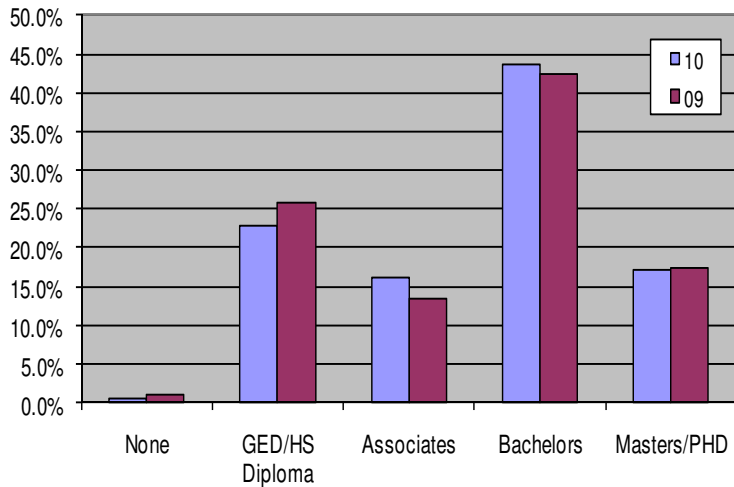
As you can see from the chart on the left, RPG podcast listeners are very well educated compared to the general population—the women even more so than the men. It would appear that table-top RPGs and podcasts about them appeal to the better educated.

Education 2010



Who Are the Listeners? (Cont)

Education 2010 vs 2009

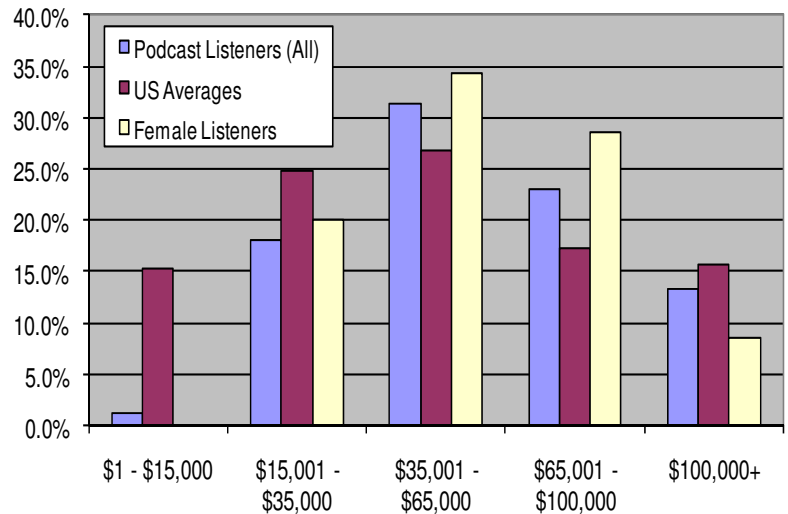


The chart to the left compares the education question results from last year to this year. While there is a slight trend upwards, there doesn't appear to be a significant change in any of these categories. Again, it will be interesting to see if next year's results help us see a continuing trend.

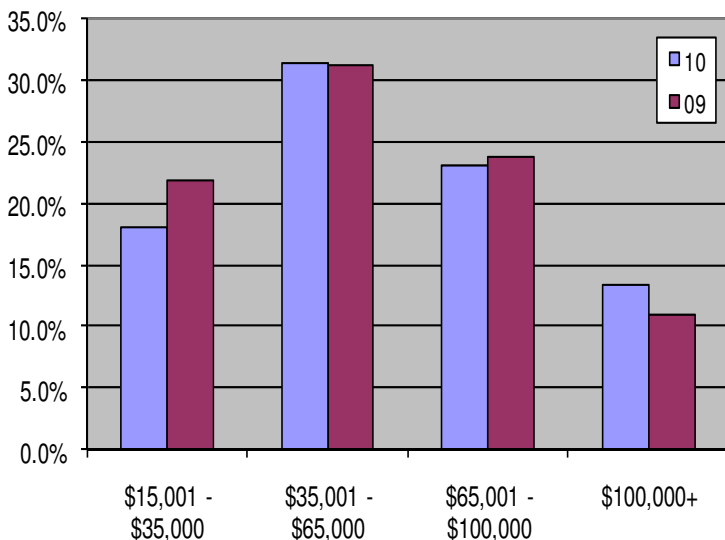
Below are two charts on income. The first compares listeners' incomes to the US averages and the second shows changes from last year's results.

Annual income data was collected only in US dollars for ease of comparison. In addition to the results in these charts, 7.7% of listeners are full-time students and 5.2% are unemployed. This survey was primarily conducted in May 2010 when US unemployment was at 9.7%. In May 2009, gamers reported an unemployment rate of 8.9% when the US was at 7.2%. Hopefully gamers are a leading indicator of unemployment and the US numbers will soon drop.

Income 2010



Income 2010 vs 2009



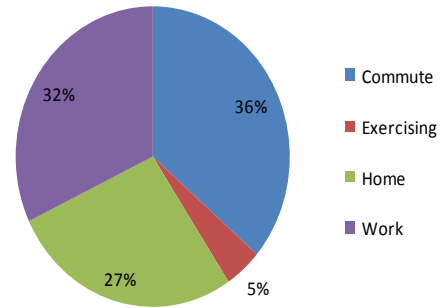
Two significant changes in the income levels from last year's results are in the \$15,000-\$35,000 and \$100,000+ brackets. Gamers appear to be leaving the lower bracket and entering the higher bracket while the brackets in between varied only a little. While the drop in gamer unemployment could certainly be a factor, so could aging. Unfortunately we don't have age information from last year to back this up, so this will be another interesting category to watch next year.

How Do They Listen?

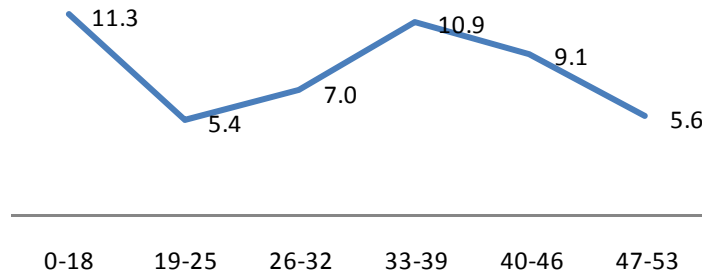
Listeners report subscribing to **8.61** podcasts on average. This is an increase over 7.89 last year. Women also saw an increase from 3.79 to **4.26** podcast subscription. Married listeners subscribe to more podcasts (9.3) than single listeners (7.8). In this context, subscriptions indicates how many podcasts each respondent listens to on a regular basis, not how many podcasts they subscribe to on services such as iTunes.

This year the survey asked where listeners listen to RPG podcasts. The vast majority listen at work or on their commute with far fewer listening at home or while exercising.

Where Listeners Listen

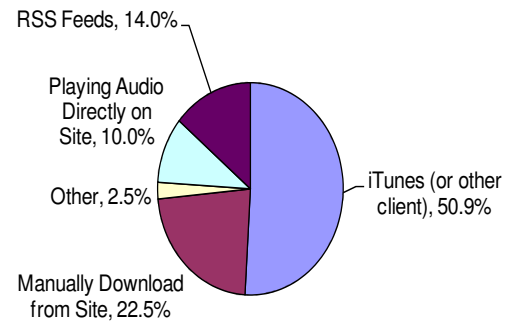


Average # of Podcasts by Age Group



While young listeners (under 18 years old) account for only 2.5% of all listeners, they listen to more shows, on average, than any other group. And while 26 to 32 year olds make up 27.9% of listeners, they listen to far fewer shows than the next two older brackets.

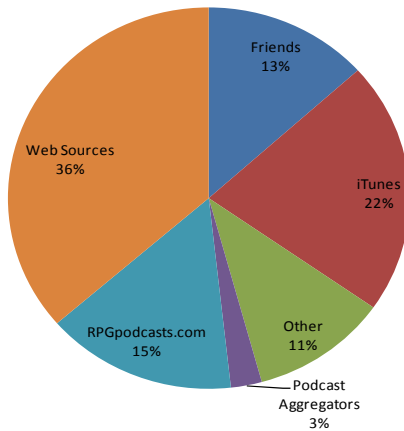
Podcast Download Method



Podcast download methods are relatively unchanged from last year with iTunes and other clients still the preferred method.

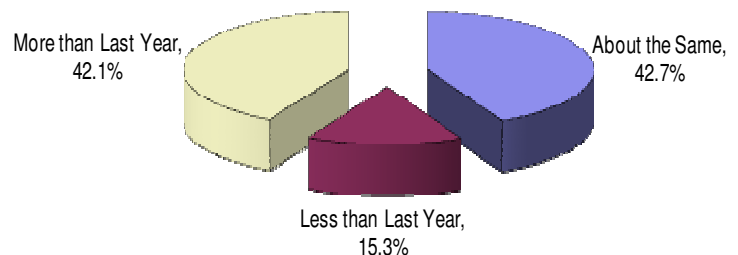
Another new question in this year's survey tried to determine where gamers get their information about gaming podcasts. While RPGpodcasts.com is doing well, it doesn't yet have the level of awareness to be the primary source of this information.

Where Listeners Learn About Podcasts



Podcast listening frequency is a self-reported measure that is difficult to assess when the average number of podcast subscriptions rises and the "More than Last Year" response falls (it was 54.6% in 2009). It will take at least one more year's worth of data to trend and understand these two results.

Podcast Listening Frequency '09 vs. '10



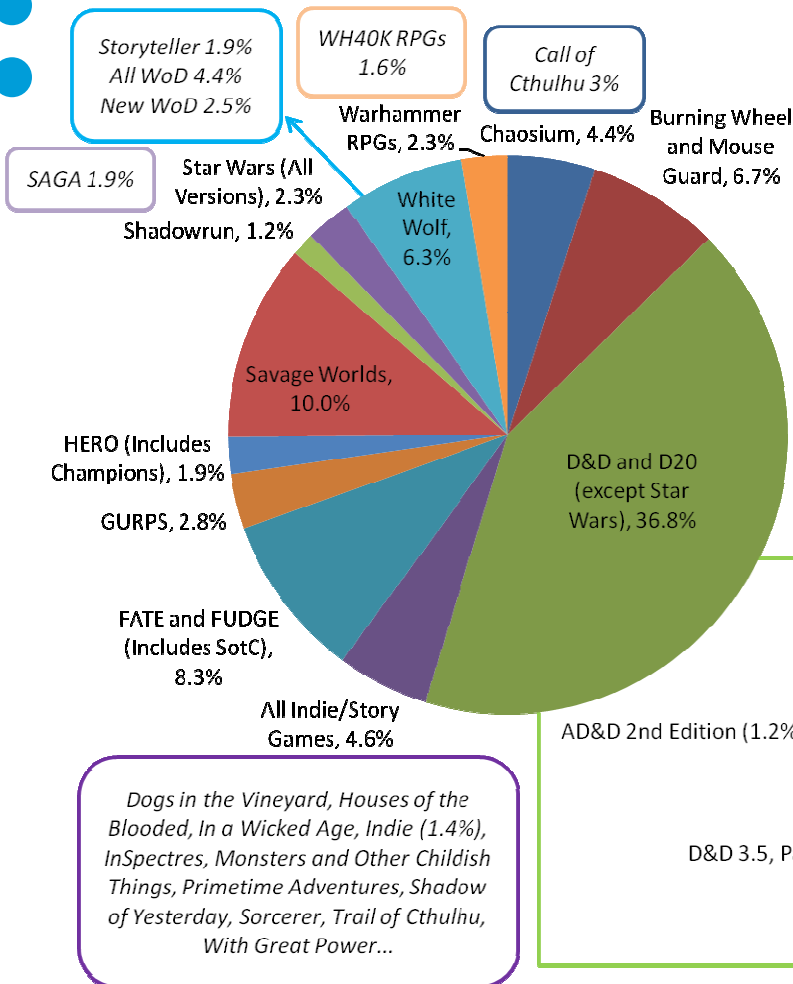
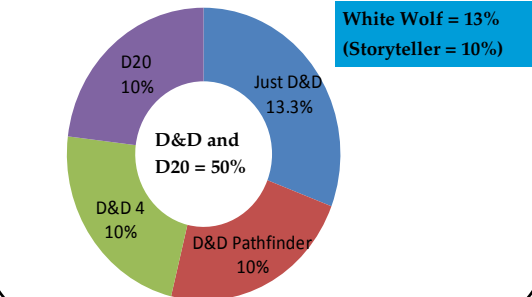
What Games Do They Play?

The "Preferred Gaming System" field was also an open input field. In order to derive meaningful data, I did my best to interpret responses and consolidate games by system, sub-system, version, and company as appropriate for each case. There were many more gaming systems listed than are on the chart below. A game needed to garner at least 1% of all listeners and be distinct from another game system or version to make it onto the chart.

While there are a many valid ways to interpret and present this data, I tried to make meaningful comparisons and call out important bits of data. But there will always be judgment involved in any such analysis. For instance, what constitutes an "Indie" or "Story" game is a subject that could be debated endlessly. The purple box below lists all the games that respondents entered that I consolidated into the category. I tried to use the standard of an independently published RPG, but I listed Luke Crane's products—"Burning Wheel" and "Mouse Guard"—as their own category. If they were considered part of "All Indie/Story Games" that category would be at 11.3%. Also, many FATE and FUDGE games are independently published as these are open-source games. But their significant popularity and perceived association with one game company set them apart.

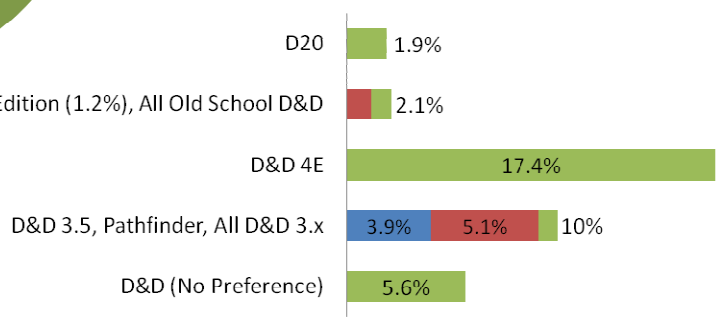
The small sample of women gamers made analysis of their preferred systems more challenging. The bar was raised to 10% and therefore the "Favorite Games for Women" chart is much simpler. While 50% of women listed some form of D&D or D20 as their favorite game, it is interesting that no one version is dominant among women.

Favorite Games for Women

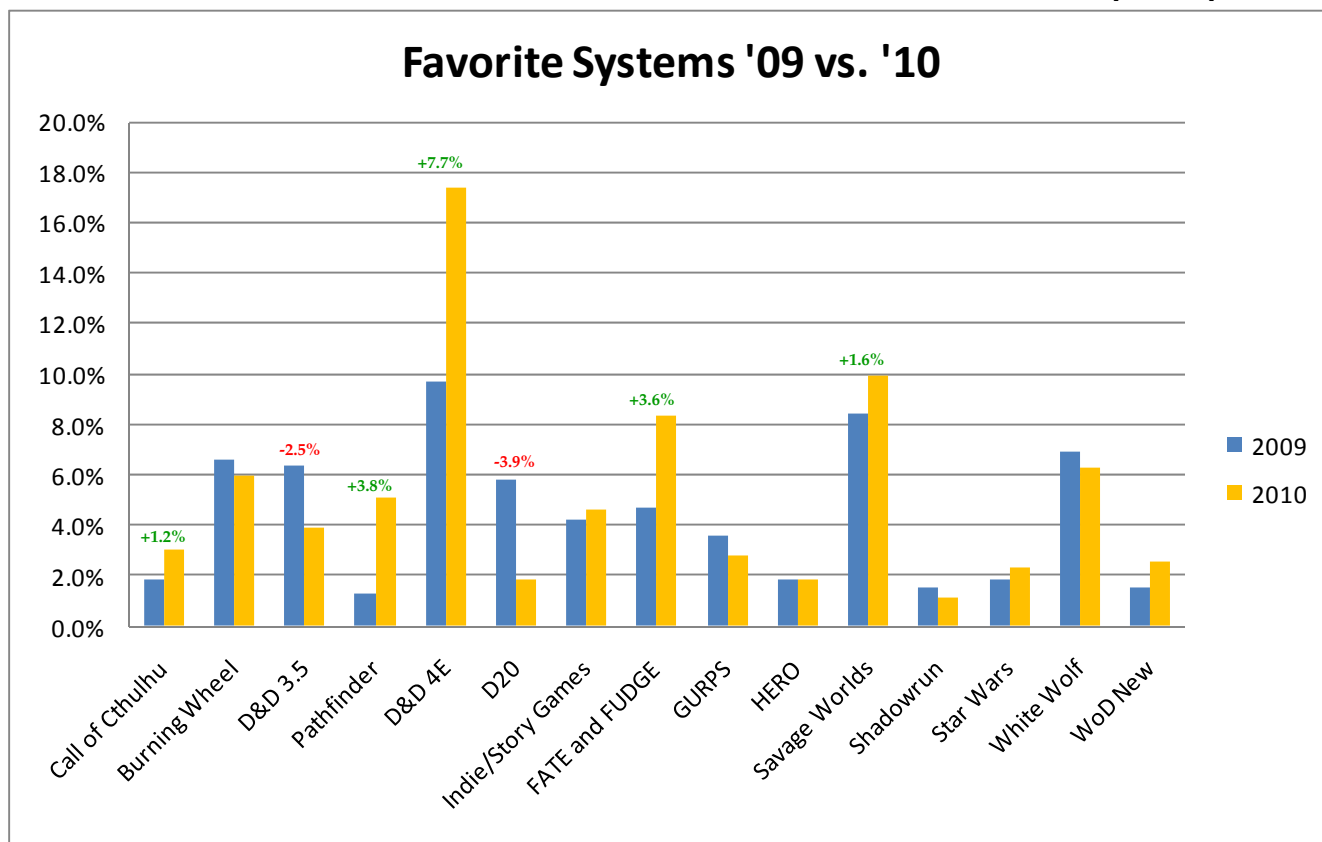


Note that the survey asked "Please list your preferred gaming system, include edition if applicable." It did not ask for an "all-time" favorite or what game you are actually playing most frequently. It's possible that many people listed something they rarely play or possibly haven't ever played. The intent was to determine what gamers want to be playing and therefore what games they are likely to be spending their time and money on and what games they most want to hear about on podcasts.

D&D/D20 Breakout



What Games Do They Play? (Cont)



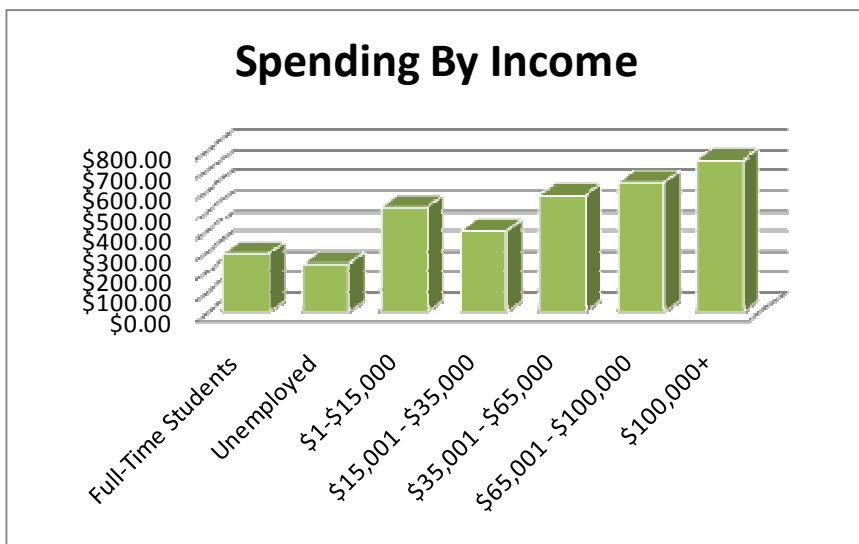
Since the same methodology for determining Preferred Game Systems was used last year, I was able to compare which games had risen and fallen in popularity. Above are the major systems and groups from both years with significant gains and loses indicated in green and red.

Through this chart, I think it's fair to interpret that most D&D 3.5 and D20 players have switched to either Pathfinder or D&D 4E within the last year. While D&D 4E—which was released two years ago—was the big winner, the growth of Pathfinder shows that there is still much interest in the D&D 3E based systems.

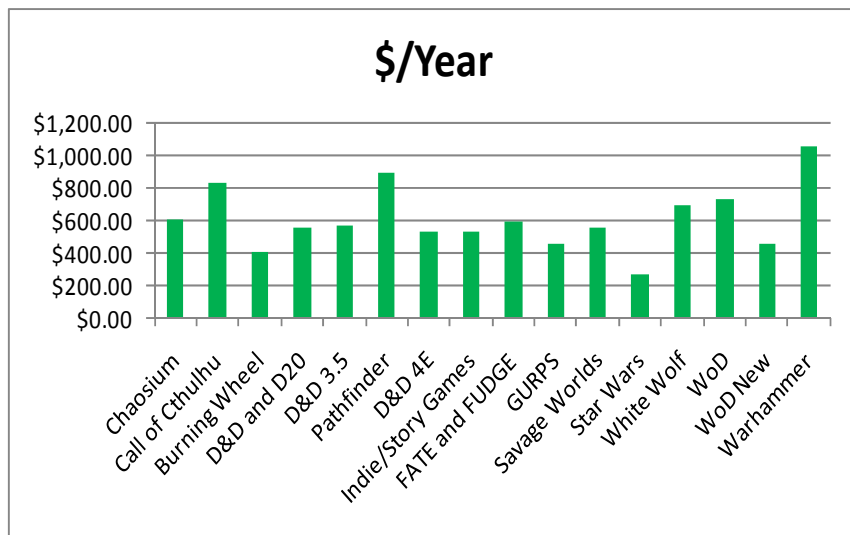
The other large and surprising gain is for the FATE and FUDGE group. Note that this survey was conducted largely before the premiere of the anticipated "Dresden Files RPG" and that no one listed that system as their preferred system. I don't know if FATE and FUDGE are gain adherents from the loses in other game systems listed here or those not listed, but clearly it's having a good year.

In addition to preferred gaming system the survey also tries to ascertain how listeners spend their gaming dollars by asking how many US dollars they spend on tabletop games annually. This number could include minis and board games as well as RPGs. The average for this year was **\$542.75**. Last year the average was \$472.76. This is a significant increase that could backup the claim that gaming is a recession-proof industry.

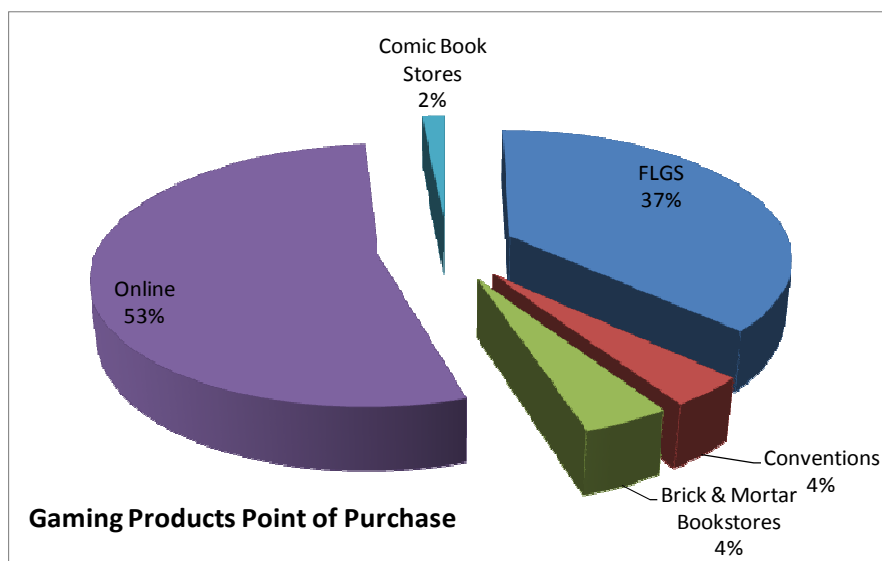
Married people spend more on tabletop games annually (\$569.69) than single people (\$516.63).



What Games Do They Play? (Cont)



The chart above shows the average annual expenditures on tabletop games by preferred game system. This does not indicate how much the listeners spent on these games, but there are some interesting correlations. For instance, Warhammer RPG players (all versions) spend significantly more on tabletop games than gamers that prefer other systems. Is it likely that Warhammer RPG adherents also play some form of Warhammer miniatures game? It's also interesting that fans of Star Wars RPGs spend significantly less. This could be due to the fact that no version of the Star Wars RPG is currently in print.



The available selections for "Gaming Products Point of Purchase" changed this year to include Brick & Mortar Bookstores and Comic Book Stores. These additions did not significantly change the results from last year. None of the other three options—Online, Friendly Local Game Store (FLGS), and Conventions—lost more than 2.5%.

What Shows Do They Listen To?

The Top 20 Podcasts

The table to the right lists the top 20 podcasts by percentage of respondents who listen to them. Last year listeners selected their three favorite shows. This year listeners were asked to select *all* the shows they listen (from a list of 86 RPG podcasts). One outcome of this change is that we can't meaningfully compare these numbers to last year's, but this method allows for a more complete picture of what shows gamers listen to.

In addition to the percentages of listeners, the table also shows the average annual spending on games and the average number of podcasts subscriptions for the listeners of each show. Keep in mind that there is a lot of overlap between groups as most listeners selected many shows—i.e. none of these data sets is unique.

Highlighted in green are the top scores for annual spending on games and podcast subscriptions. The lowest scores for each are in red. Apparently "Kicked in the Dicebags!" listeners are thrifty and "The Game's the Thing" listeners are loaded. Also, Happy Jack's listeners don't need nearly as many other podcasts as the listeners of the "Open Design Podcast". Or perhaps Open Design's listeners are just more podcast savvy?

Listeners of all Top 20 shows listen to more podcasts than the average listener (8.61). It would seem that the more popular shows are good for the less popular ones.

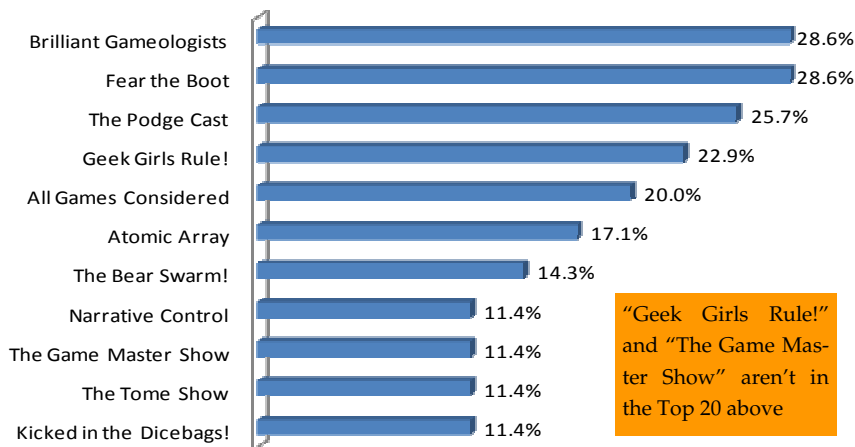
Show	Repondents Who Listen	\$/Year	Average # of Podcasts
Open Design Podcast	13.4%	\$645.66	16.7
The Tome Show	13.7%	\$685.82	15.9
The Game's the Thing	14.1%	\$759.31	15.1
Actual People, Actual Play	14.8%	\$617.09	14.6
Kicked in the Dicebags!	15.0%	\$460.44	15.1
The Walking Eye	17.4%	\$498.45	14.5
Canon Puncture	17.4%	\$585.06	16.3
Have Games, Will Travel	18.4%	\$684.75	15.1
Narrative Control	18.7%	\$671.49	15.1
TrapCast	18.9%	\$521.01	12.8
2d6 Feet in a Random Direction	18.9%	\$713.05	16.6
The Voice of the Revolution	19.3%	\$599.42	16.3
Happy Jacks RPG Podcast	19.5%	\$623.78	9.4
Atomic Array	19.5%	\$673.93	15.1
Brilliant Gameologists	24.1%	\$499.12	15.3
The Bear Swarm!	26.0%	\$529.29	13.9
Role Playing Public Radio	26.2%	\$499.74	9.7
All Games Considered	28.4%	\$611.88	13.9
The Podge Cast	36.4%	\$587.90	12.8
Fear the Boot	44.0%	\$497.93	11.6

Honorable Mentions

These podcasts were selected by at least 10% of the respondents

RPG Circus	10.2%
YSDC: Cthulhu Podcast	10.6%
Pulp Gamer Hard Core	10.8%
The Jank Cast	10.8%
This Modern Death	11.1%
Radio Free Hommlet	11.7%
Gamer's Haven	11.9%
The Game Master Show	12.4%
RPG Countdown	12.4%
That's How We Roll	13.2%

Favorite Podcasts for Women



"Geek Girls Rule!" and "The Game Master Show" aren't in the Top 20 above

One interesting result in this year's survey and last's is the difference between the shows men and women prefer. While the sample sizes have been small, three shows have faired consistently better with women in both years—Brilliant Gameologists, Geek Girls Rule!, and The Game Master Show.