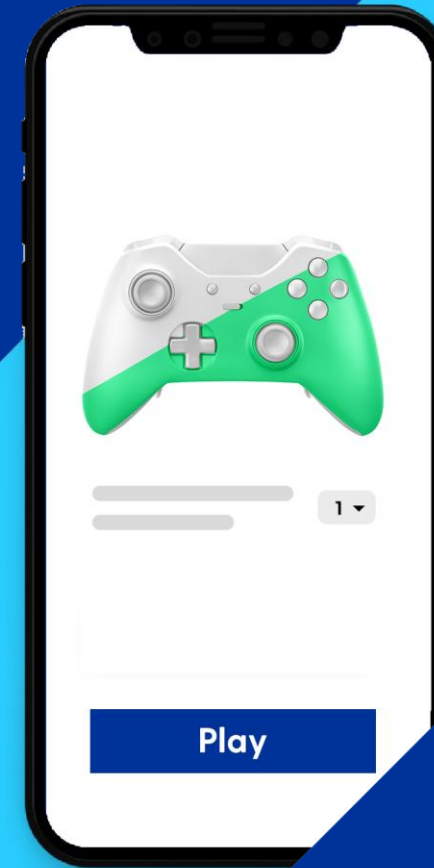


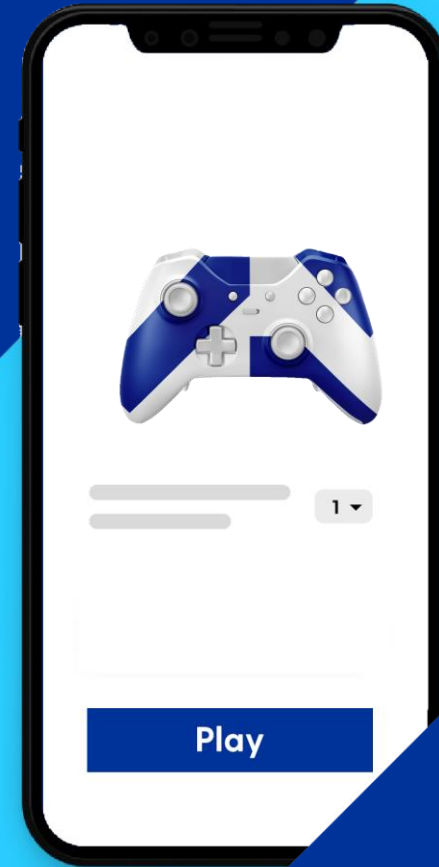
Mobile Gaming Study

November 2020



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Markets studied and field schedule

Fieldwork took place between November 5th - 18th 2020

- ▶ Data was collected from a sample of 5,151 mobile gamers globally, including those interested in mobile gaming, between the ages of 16-45.
- ▶ Roughly 1,000 completes in 5 markets (see breakdown to the right) were collected.
- ▶ Quotas were set and the data was weighted by age/gender (interlocked) based on a profile of mobile gamers in each market.

Market		Completed Interviews
	US	1,046
	UK	1,060
	France	1,022
	Germany	1,015
	Australia	1,008

Mobile Gaming Attitudes

Making the most of monetization



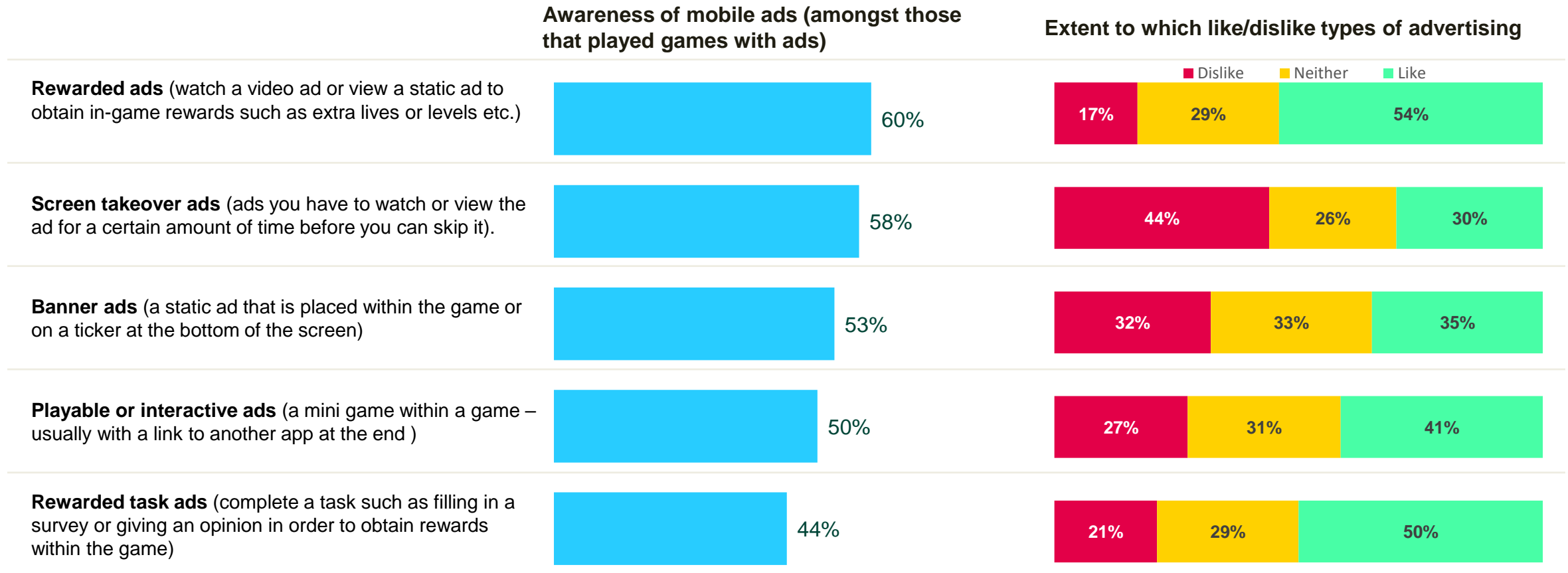
Make more use of interactive ads and reward task ads

- ▶ Interactive ads and reward task ads have the lowest awareness but are liked more by mobile gamers.
- ▶ Reduce usage of screen-takeovers and banner ads, as they are seen more but less preferred.

Be fair in offering multiple ways to gain in-game items

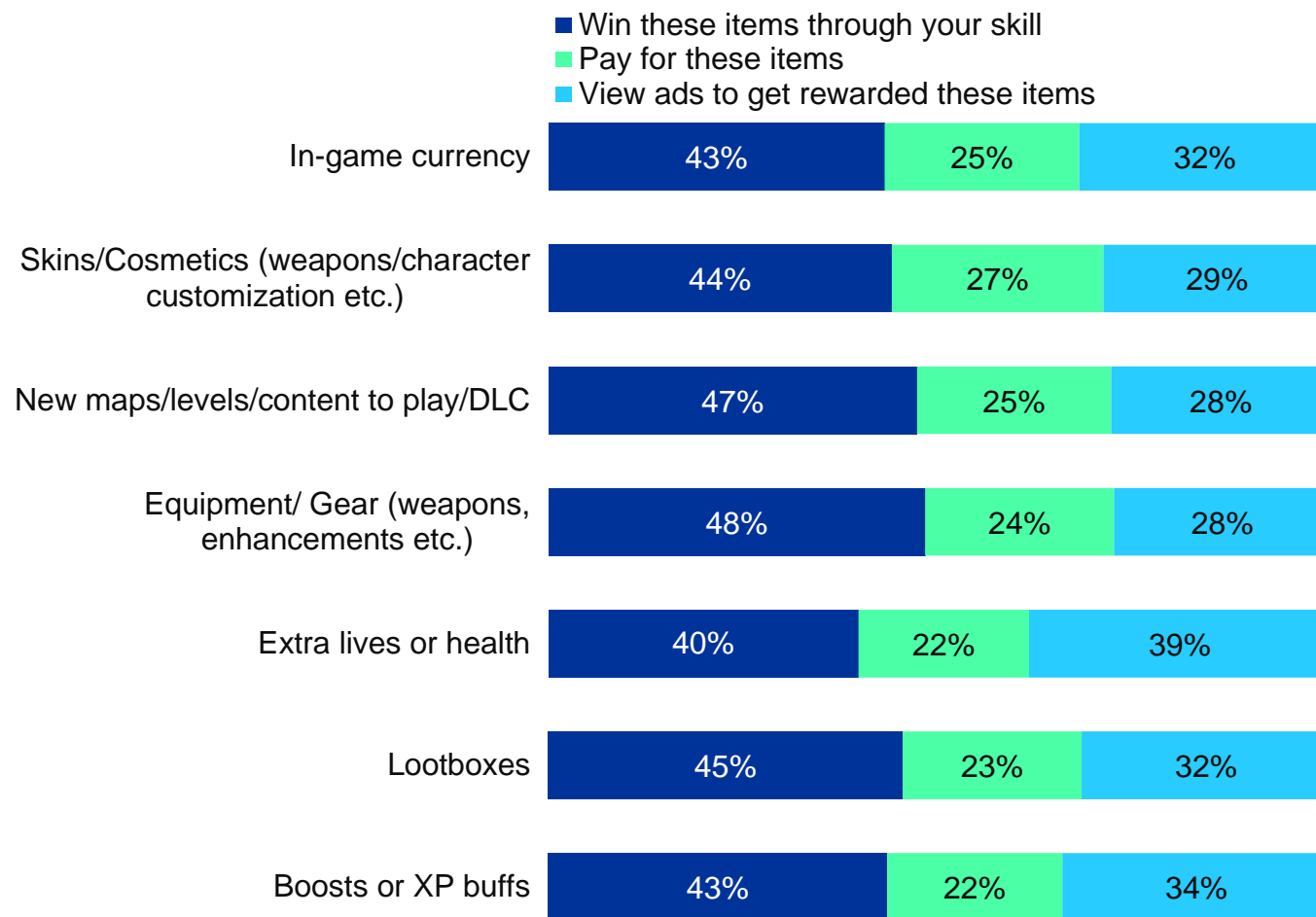
- ▶ Mobile gamers tend to prefer viewing ads when asked which is more acceptable between viewing ads or paying to gain in-game items.
- ▶ Viewing ads is seen as most acceptable for gaining extra lives, while gamers tend to think purchasing in-game currency and skins/cosmetics are also acceptable (but still not as acceptable as viewing ads).
- ▶ When asked their preference, most mobile gamers prefer to win in-app items with skill over viewing ads or paying, so make sure to offer a fair challenge to those who don't want to pay/view.

Game developers can make more of playable/interactive ads and rewarded task ads as they have high likeability but lower awareness



When asked which they prefer between winning these items vs. paying/viewing ads for them, people tended to choose winning as a preference. It is key to accommodate all needs, but make sure to be fair to those gamers who want to win through skill

Preferred method of obtaining the below items



Mobile Gaming Monetization

Which models to use when



Use free games to reach the wider market – great for if you're a smaller developer

- ▶ Free to play with ads OR with in-app purchases are the types of models that most gamers tend to play.
- ▶ Mobile gamers tend to avoid games that use multiple ways to monetize (such as combining pay to download with in-app purchases).

Capitalize on greater engagement with pay to play games when you're more established

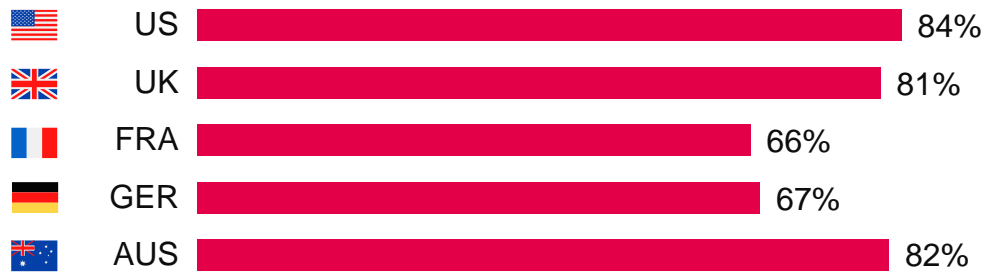
- ▶ There are fewer multi-payment, pay to download and subscription gamers, but they tend to play more of those types of games.

Think about optimizing your in-game purchase offering

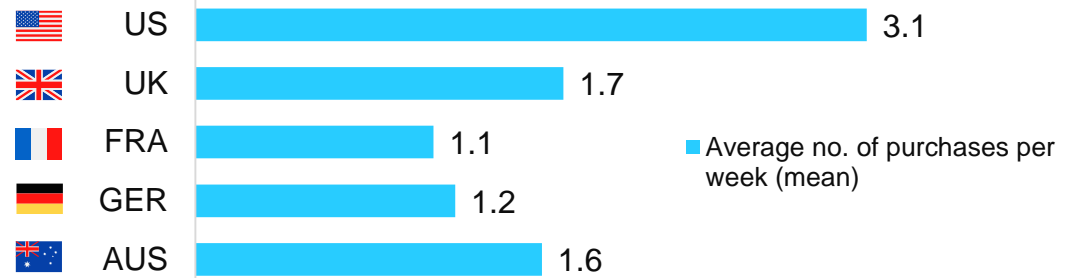
- ▶ Many of those that played games with in-app purchases in the last 12 months actually made a purchase.
- ▶ Optimize your payment model using concept testing to enable more engagement and increase revenue over time.

Mobile gamers in the US, UK and Australia play more in-app purchase games, with US gamers actually making in-app purchases more frequently; there are major differences by market in the type of in-app purchase made too

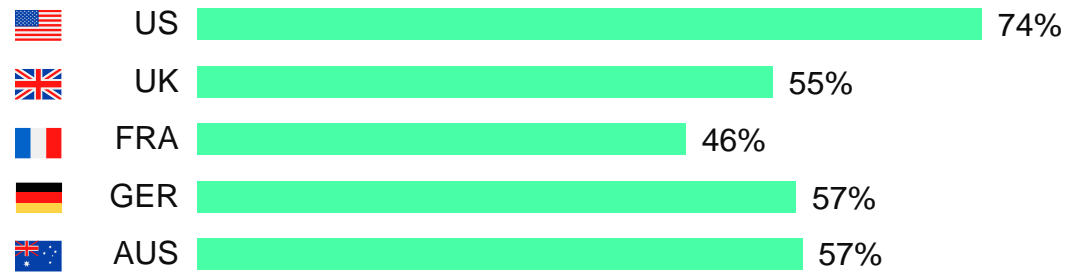
Played mobile games with in-app purchases (in the last 12 months)



How often do they make in-app purchases? (of those made in-app purchases)



Have you made any in-app purchases in the last 12 months? (of those play games with in-app purchases)

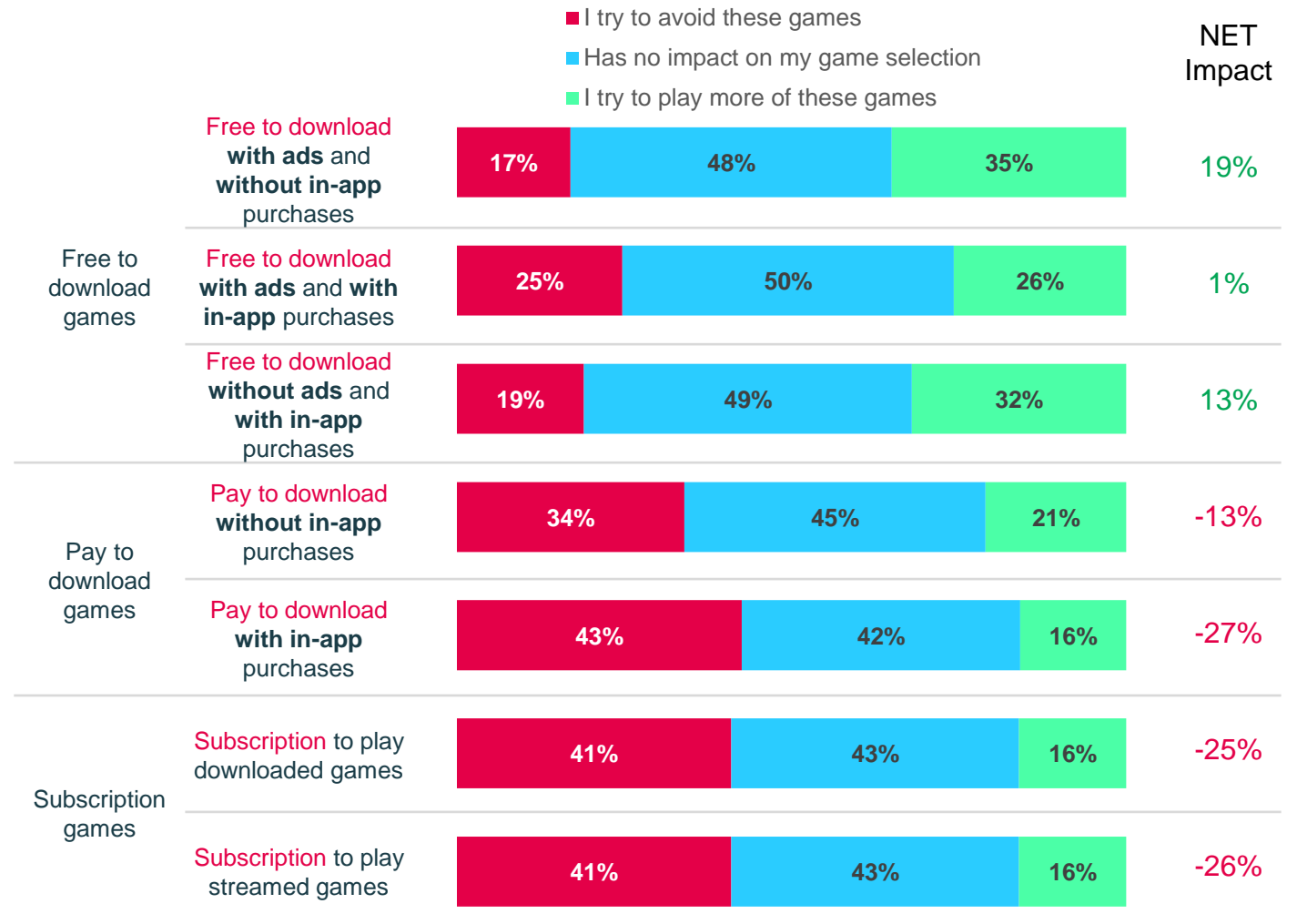


What in-app purchases have you made (of those made in-app purchases)

	US	UK	FRA	GER	AUS
In-game currency	60%	49%	31%	45%	55%
Extra lives or health	47%	41%	30%	34%	38%
Equipment/ Gear (weapons, enhancements etc.)	43%	32%	40%	34%	36%
Skins/Cosmetics (customization etc.)	40%	34%	35%	25%	32%
New maps/levels/content to play/DLC	36%	30%	41%	29%	27%
Boosts or XP buffs	38%	30%	31%	24%	28%
Lootboxes	29%	26%	20%	19%	24%

A large minority of people actively avoid having to pay for mobile games, while free to play games with ads are the most likely to encourage people to play

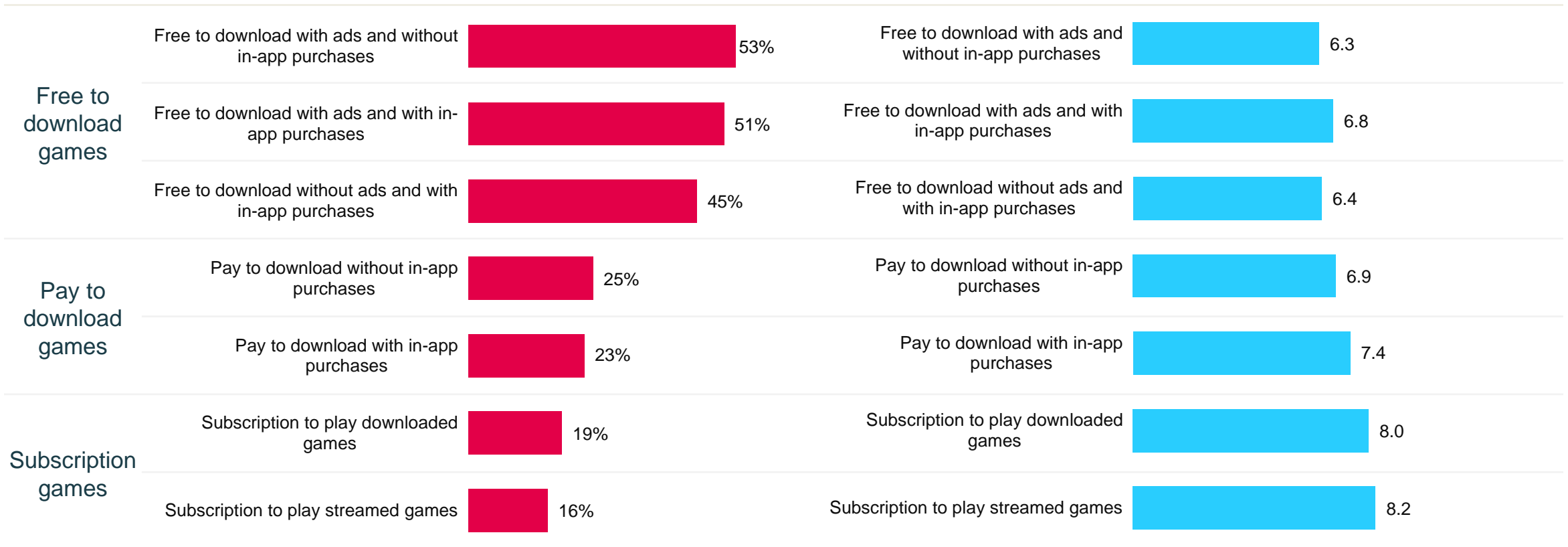
- ▶ And which of the below best applies to the impact the monetization model has on your selection of a mobile game?



While free to play is more popular, don't ignore the paid market as gamers who pay to play or subscribe to games on their mobile tend to play more of them than free ones

Types of mobile games played over the last 12 months?

Average number of games played this way in the last 12 months? (of those that play games this way)



Mobile Gaming Engagement

Which models to use when



There are many gaps in the market across genres

- ▶ Across all genres, around half of those interested in a genre haven't actually played a mobile game in that genre.

There are many genres where unmet needs can be addressed

- ▶ When asked if it was easy or hard to find games across genres, Adventure, Racing, Strategy, Simulation/Management, and Music games had high interest levels but around 1 in 4 found it hard to find games within those genres they liked for them.
- ▶ Role-Playing, Action and Location-Based games had slightly lower interest but many also found it hard to find games in those genres (again at least 1 in 4).

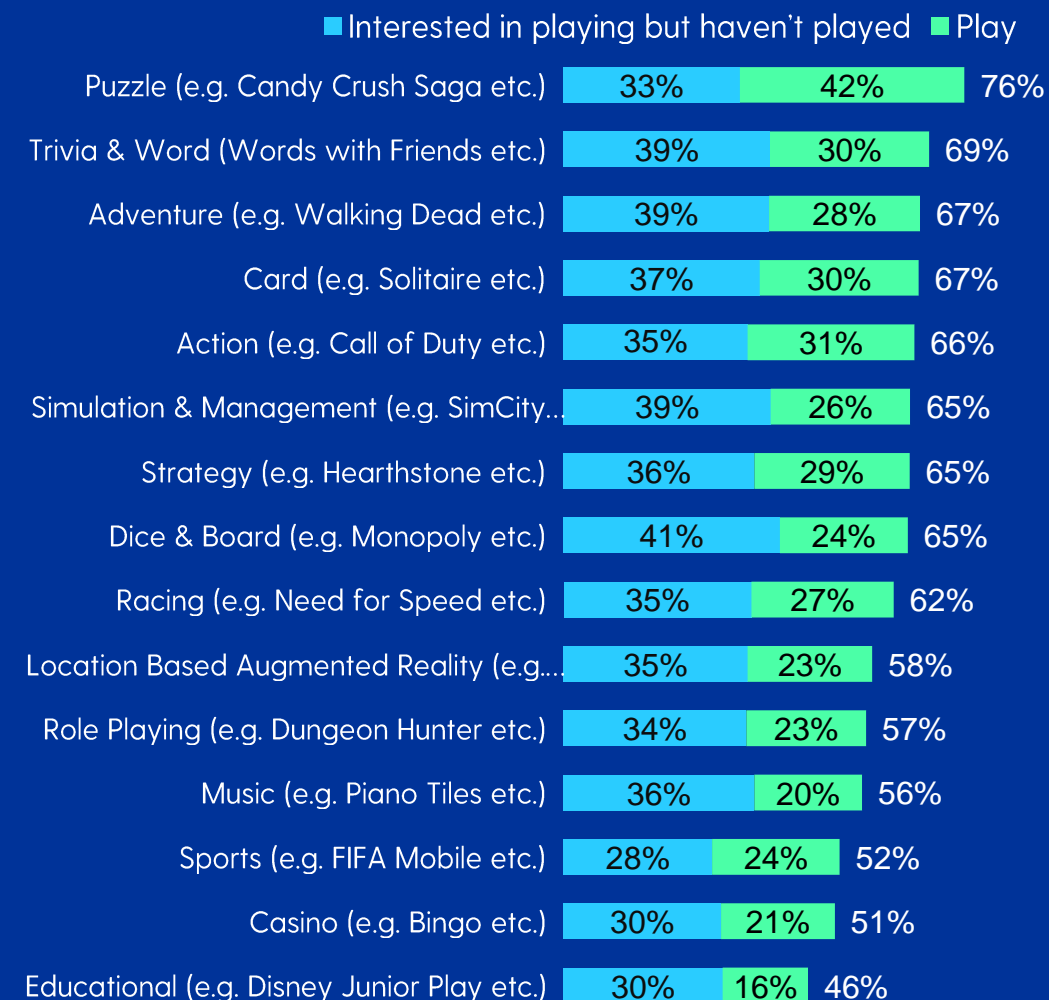
Research can help to understand how to meet unaddressed needs

- ▶ Target those gamers who find it hard to locate and play certain games/genres to better understand what types of games they want to play in those genres, and what the barriers are to finding those games.

Dice & Board, Trivia, Adventure, and Simulation & Management games have high levels of gamers who are interested but don't currently play on mobile

Mobile game companies could do more to tap into unrealized demand across game genres

Engagement with each of the below mobile game genres ...



Creating better targeted Role-Playing, Adventure, Action, Strategy, Racing Simulation and AR games will help satisfy demand that isn't currently being met in those genres

Interested in mobile games vs can't find the games I want.

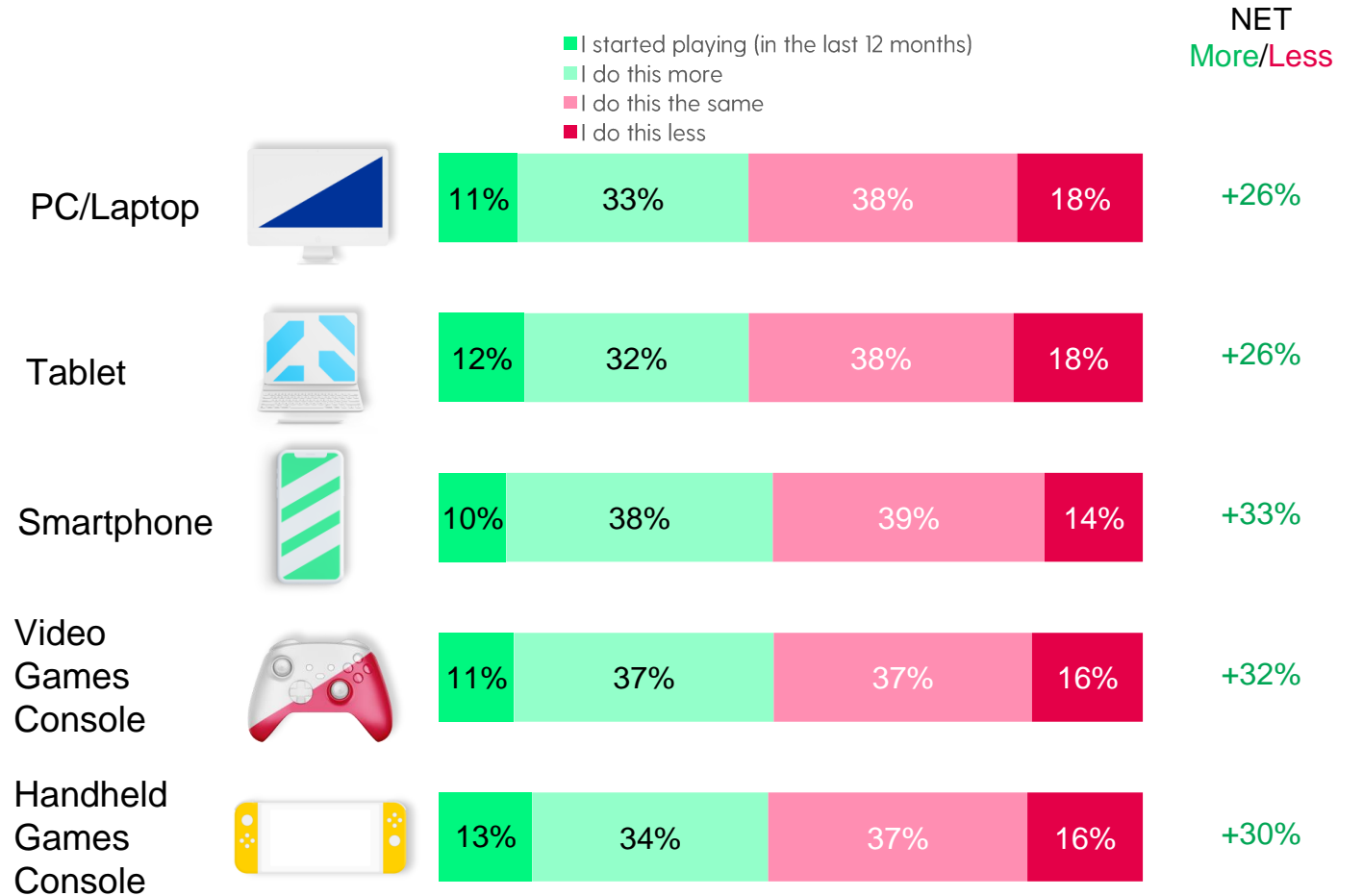
1 in 5

gamers who are interested in or play Role-Playing and Adventure games struggle to find a game they want to play!



Gaming across all devices has increased among mobile gamers in the last 12 months – developers could make use of that, offering more cross-device playing options

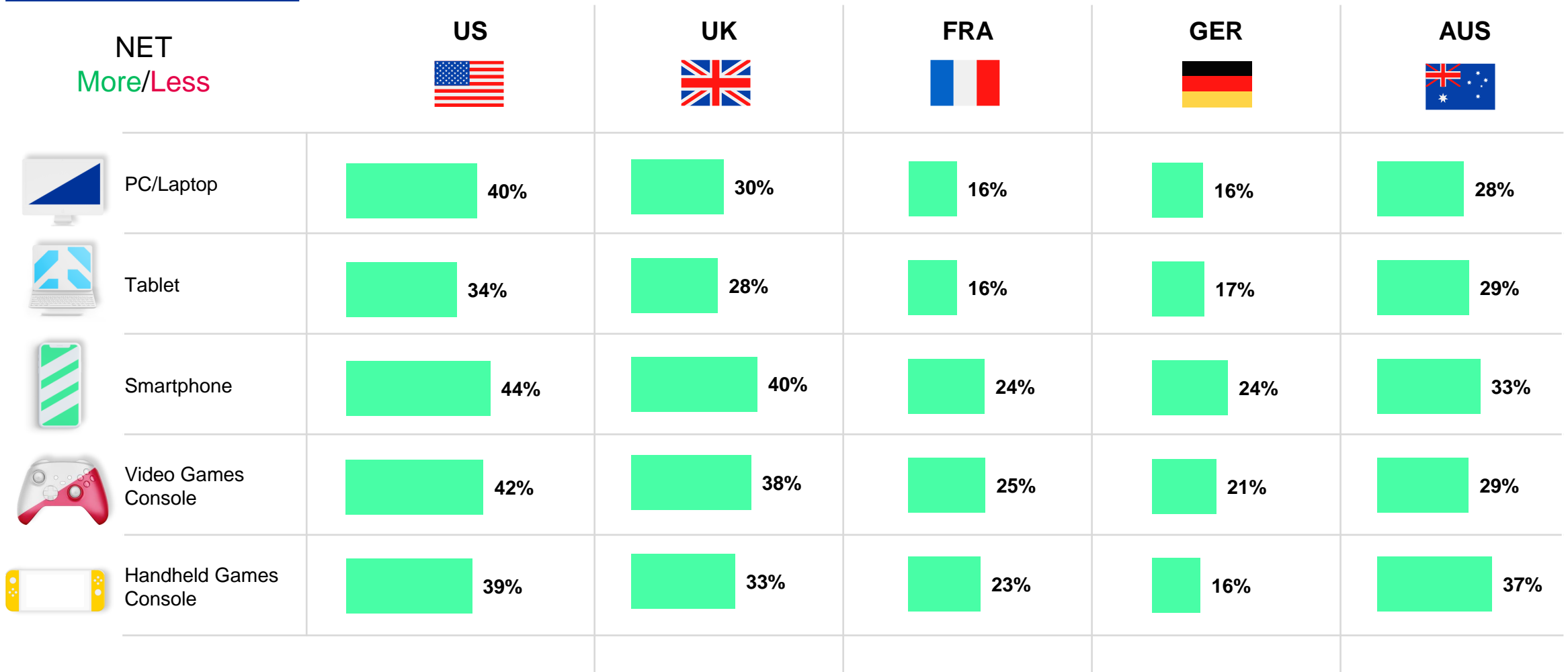
- ▶ Do you play games more, less or the same than 12 months ago? (of those play games on the following devices)



Gaming on all devices has increased significantly in the US, UK and Australia among mobile gamers





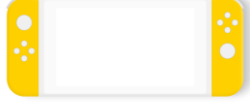





Market View

Change in behavior over the last 12 months



US mobile gamers more frequently play games across devices in general and particularly on smartphone

How often, on average do you play video games on the following devices?
(Of those with access to these devices)





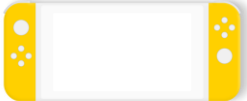





Average (mean) frequency play games per week		PC/Laptop 	Tablet 	Smartphone 	Video Games Console 	Handheld Games Console 
US		5.6	5.7	8.0	6.0	5.7
UK		3.8	3.6	6.3	5.0	4.1
FRA		3.5	3.1	6.3	4.1	3.2
GER		3.2	3.2	5.8	3.6	3.3
AUS		3.8	3.9	6.1	3.8	3.6

As with frequency, we see longer gaming sessions in the US vs. other markets

Market View

Average number of minutes spent playing games on the following devices
(Of those play games on the following devices in the last 12 months)

Average (mean) minutes spent per gaming session

		 PC/Laptop	 Tablet	 Smartphone	 Video Games Console	 Handheld Games Console
US		122 mins	101 mins	114 mins	133 mins	123 mins
UK		99 mins	69 mins	80 mins	125 mins	90 mins
FRA		95 mins	55 mins	70 mins	106 mins	82 mins
GER		104 mins	73 mins	82 mins	119 mins	95 mins
AUS		100 mins	68 mins	79 mins	110 mins	86 mins

Get in touch

Get in touch if you'd like to talk through any of the details in this e-book and receive access to our full and comprehensive Mobile Gaming Report.

