



THE CHANGING FACE OF MOBILE GAMERS

WHAT BRANDS NEED TO KNOW TO CONNECT WITH
TODAY'S 1.9 BILLION PLAYERS WORLDWIDE

INTRODUCTION



More than half of the US population and nearly 70% of the country's smartphone owners play games on their mobile devices, and they spend an average of 55 minutes a day doing so. Market research firm Newzoo claims that there are approximately 1.9 billion mobile gamers throughout the world, and it's not just one particular demographic: people of all ages, genders and income brackets play mobile games.

Yet for all their popularity, there are a lot of misconceptions around mobile games and the people who play them. These misconceptions have prevented many marketers from including mobile games as part of their media strategies, tending to favor social networks, messaging apps, and other, more "mainstream" mobile channels instead. But budgets have been shifting as of late, and brands are beginning to re-think how they can align their marketing with consumers' favorite mobile pastime -- mobile games.

To help marketers gain a better understanding of the mobile gaming phenomenon and the people driving it, we decided to ask consumers themselves why they play, when they play, what they play, and how they feel when playing. Some of their answers were expected, while others surprised us.

Here's what we found...



SOURCES:

- <http://www.emarketer.com/Article/Advertisers-Its-Mobile-Game-Time/1012694>
- <http://www.statista.com/statistics/234635/number-of-mobile-gamers-forecast/>
- <https://newzoo.com/insights/segments/mobile/>

EXECUTIVE SUMMARY

With more than 1.9 billion consumers throughout the world playing mobile games for an average of 55 minutes per day, the channel presents an enormous opportunity for brands and marketers to connect with highly engaged audiences



EXECUTIVE SUMMARY

 Although consumers from every age, gender, country and background play mobile games consistently, more than two-thirds of them do not consider themselves "gamers."

 The most popular mobile games are casual and entertaining. Puzzle games are by far the most popular category, played by 59% of respondents. Strategy (38%), Trivia (33%) and Casino/Card (27%) games were next on the list, respectively.

 People tend to play mobile game most often while watching television, with 70% of respondents admitting that they play games while sitting in front of the TV.

 Mobile games put consumers in a different mindset -- and a much better mood -- than social apps like Facebook and Twitter; consumers are twice as likely to say they feel relaxed when playing mobile games than they are when using social apps.

METHODOLOGY

Data for this report is based on a survey of 5,623 unique smartphone and tablet owners. The survey was conducted in September 2016.

Consumers had to be 13 and above to take part. The survey was run through mobile gaming apps on iOS and Android, so by default all respondents played mobile games on at least one occasion.



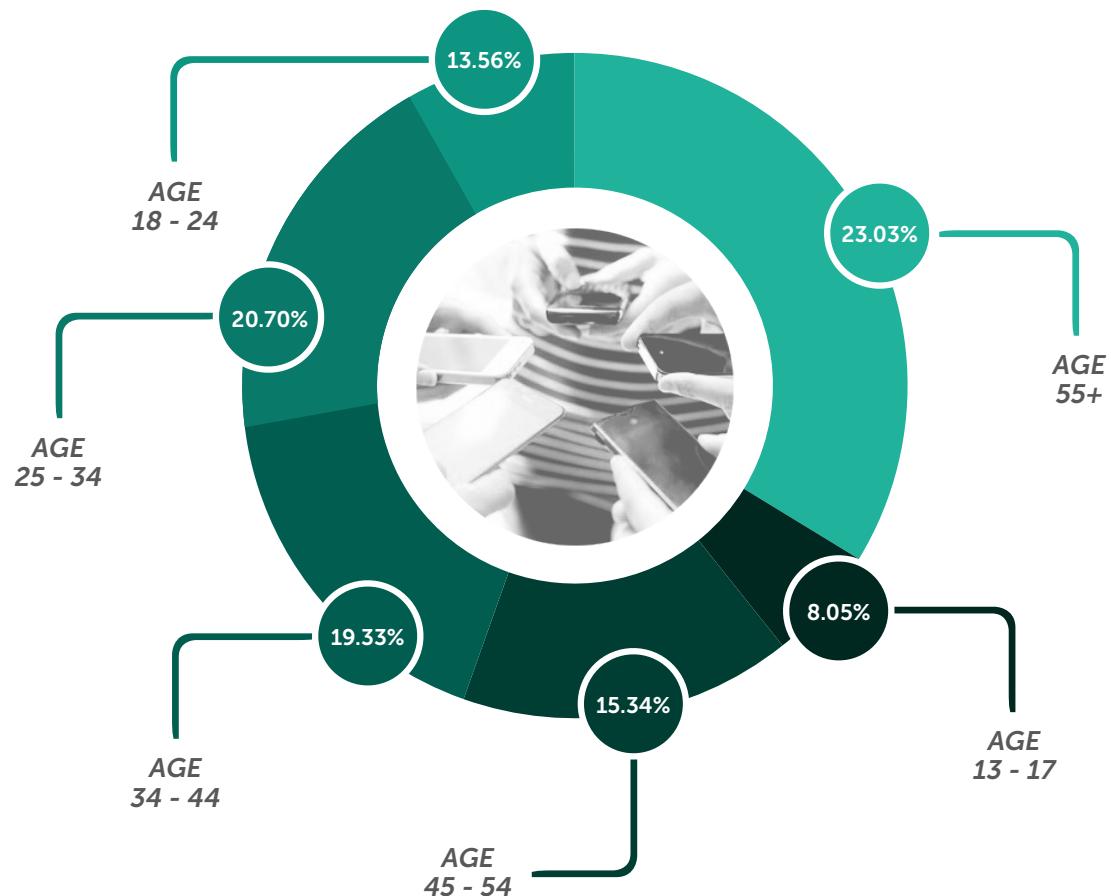
WHO: PEOPLE OF ALL AGES PLAY GAMES ON THEIR MOBILE DEVICE

As mentioned earlier, among the 1.9 billion mobile gamers worldwide, a variety of demographics is represented. In our study, all age ranges were well-represented. Consumers 55 and over were the largest segment, representing 23% of the respondents. Consumers 25 - 34 represented 21%, while those 35 - 44 represented 19%.

♀ 63% ♂ 37%

Females made up 63% of our respondents, with men at 37%.

This supports other research showing that women are the majority of mobile gamers.





HOW: HOW MANY TIMES PER WEEK DO PEOPLE PLAY

TWO-THIRDS OF GAMERS DON'T THINK OF THEMSELVES AS GAMERS

And yet, when asked whether they consider themselves gamers, the answer was a surprising and resounding "No." Only 32% of respondents who play games actually think of himself or herself as a gamer. Even among those who said that they play mobile games at least six times per week, less than one in three identifies as a "gamer."

This gap between behavior and perception shows there is a misconception around the idea and definition of a "gamer." Apparently people do not define "gamers" as people who play games. Rather, they likely think of "gamers" as those whose identity is wrapped up in games -- the quintessential image of a teenage boy spending hours on end playing video games in his basement. In reality, mobile has opened up gaming as entertainment to the masses (the majority of US adults now regularly play mobile games), and the public definition and perception of "gamers" is due for an update.

Women are especially unlikely to identify as gamers. 72% say that they do not consider themselves a "gamer" even though 59% of women say they play games at least ten times per week.

Millennials are the most likely to identify as "gamers." Even though 54% of Millennials play mobile games ten times or more each week, only 44% of mobile gaming Millennials actually think of themselves as a gamer.

Seventy-nine percent of older gamers -- those 45 and over -- do not identify themselves as a gamer, despite the fact that 55% of them play games more than ten times a week.



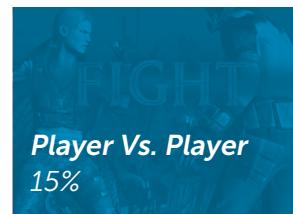
Mobile gamers are highly active.

The vast majority of them -- 69% -- said they play at least three to five times per day. Nearly a quarter of mobile gamers play 10 times or more each day. And they spend a lot of time playing games, too: 71% play for an hour or more every day, and 21% play for more than three hours a day.



WHAT:

MOST POPULAR CATEGORIES OF GAMES



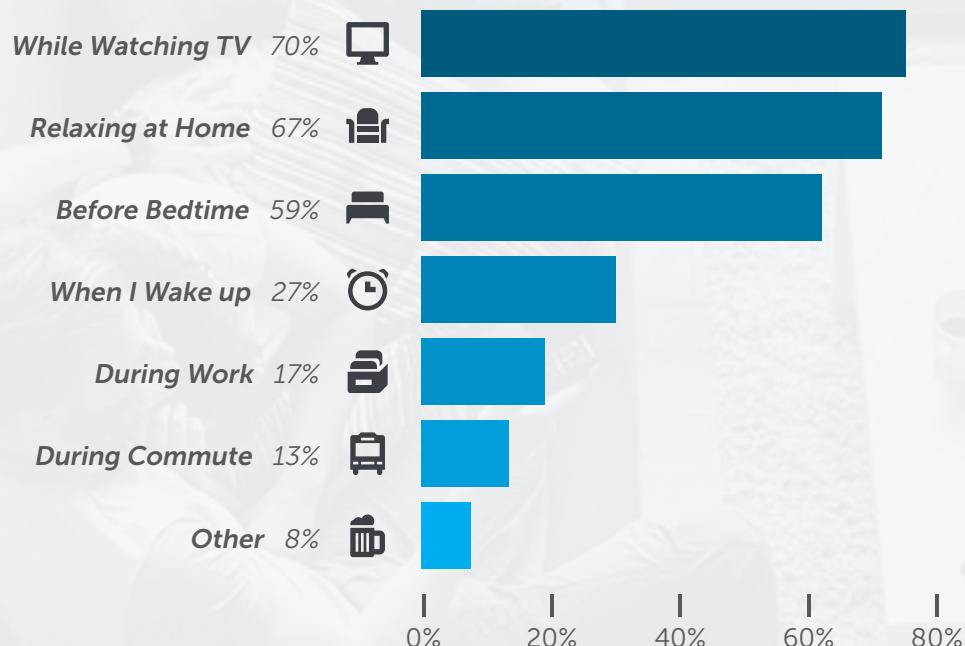
Mobile games do not fit the mold of traditional video games. The most popular mobile games are much more casual than the hardcore role playing games and first-person shooters that are typically found among the most popular games for consoles and PC platforms. The most popular mobile games are more closely related to board games played by families throughout time.

Puzzle games are by far the most popular category, played by 59% of respondents. Strategy (38%), Trivia (33%) and Casino/Card (27%) games were next on the list, respectively. Among the least popular games are Player-vs-Player (15%), Sports (11%) and Shooting (8%). It is worth pointing out that the types of games that are commonly associated with the stereotypical image of a gamer are the least popular categories for mobile games.

Millennials (18 - 34) are about twice as likely as older gamers to play Adventure games (26% of Millennials compared to 11% of gamers 35 and older) and Simulation games (26% to 13%). While older gamers are more than twice as likely as Millennials to play Casino and Card games (32% of those 35 and older compared to 19% of Millennials).

The most popular categories for mobile games are actually closer in style to board games than they are to traditional video games.

⌚ WHEN: WHEN DO CONSUMERS PLAY?



A recent Accenture study found that 87% of consumers use a mobile device while watching TV, and now we know that many of those consumers are using their second screen to play mobile games.

CONSUMERS MOSTLY PLAY MOBILE GAMES WHILE WATCHING TELEVISION

Our survey revealed that consumers tend to play mobile games most often while watching television, with 70% of respondents admitting that they play games while sitting in front of the TV. Women are even more likely to play games while watching TV (73%) than men (62%), while the behavior remains fairly consistent across all age ranges.

Mobile gamers are more than twice as likely to play games at night right before they go to bed than right when they wake up in the morning, 59% to 27%. Millennials are 24% more likely to play games before they go to sleep at night than older players and 42% more likely to play right when they wake up in the morning as well. In fact, Millennials seem to play more consistently throughout the day, over-indexing for just about every activity.

Consumers are more than twice as likely to play mobile games while relaxing at home than they are while at work or commuting. Women, in particular, are likely to play while relaxing at home -- 70% compared to 62% for men. On the other hand, men are more likely than women to play while at work -- 21% compared to 15% for women.

SOURCES:

<https://www.accenture.com/us-en/insight-digital-video-connected-consumer>



⌚ WHY:

CONSUMERS FEEL MORE ENGAGED, LESS STRESSED ON GAMES THAN ON SOCIAL APPS

Mobile games definitely put consumers in a different mindset -- and apparently a much better mood -- than social apps like Facebook and Twitter.

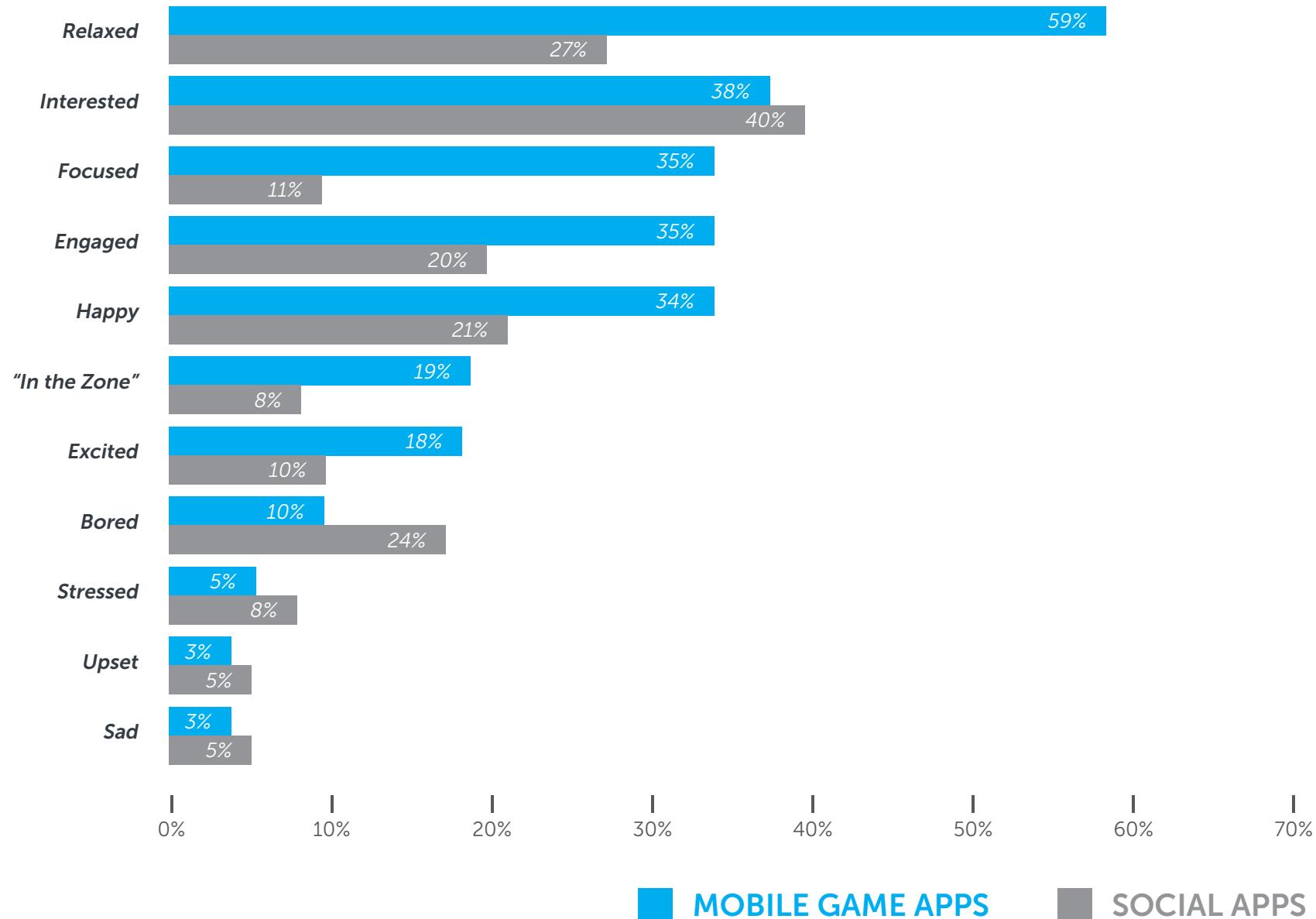
When asked to describe how they feel while playing games on their phones, "relaxed" was by far the most common response, followed by "interested," "focused," "engaged" and "happy." Very few respondents claimed to feel "stressed" or "upset" when playing mobile games, despite the fact that many games, such as action and fighting games, are intentionally designed to put players under stress -- granted, in this case, it is the positive kind of stress that gamers seem to crave. These responses were validated by consumers stated reasons for why they play games on their smartphones and tablets: "To relax," "To have fun," "To unwind / relieve stress" and "To be entertained" were the top selections.

Interestingly, consumers are twice as likely to say they feel relaxed when playing mobile games than they are when using social apps. And they are three times more likely to feel focused playing games than using social apps. They also feel significantly happier and more engaged on games than social apps.

Not only do social apps elicit less positive emotions than gaming apps, but they cause more negative emotions as well. Consumers are more than 2.4 times as likely to feel bored on social apps than gaming apps, and 60 percent more likely to feel stressed. They also report feeling sadder and more upset when using social apps than when playing mobile games.

The consumer mindset is an important factor for marketers to consider when setting their digital marketing strategies. The unique state of mind consumers have when playing games on their smartphones or tablets represents an incredible opportunity for brands to connect with consumers from all walks of life. Consumers who are more focused and engaged -- and less bored and stressed -- are understandably more open to advertising messages than consumers in less favorable states of mind, such as those while on social networking apps.

HOW DO CONSUMERS FEEL WHILE PLAYING MOBILE GAMES?





CONCLUSION

With this study, we now have a better understanding of the behaviors, motivations and attitudes of consumers while playing mobile games.



People are playing non-violent, intellectually stimulating games mainly to relax and have fun. And though they play often and consistently, they don't think of themselves as gamers.



They generally feel more positive emotions while playing mobile games compared to social apps and are in a better mindset to receive an ad and connect with a brand.



The combination of this unique mindset and the fact that mobile gaming has now reached critical mass presents an incredible opportunity for marketers to connect with consumers while they engage in one of their favorite mobile activities -- *playing games*.

THANKS!

FOR MORE INFORMATION, EMAIL ADVERTISE@TAPJOY.COM

