

MOBILE GAMING – US – 2023

Mobile gaming presents great opportunities, but new regulations and tough competition require knowledge of the latest trends and strategies to ensure success.



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Mobile Gaming - US - 2023

This report looks at the following areas:

- Defined mobile gaming segment by both motivation and device/frequency
- Mobile trends impacting the video game industry
- Who plays mobile games and how their spending has trended over recent years
- How changes to games affects churn and what changes demographics are willing to tolerate
- Lifespan of mobile games on player devices and which demographics will quit a game first
- Players preferences for mobile gaming including who sees mobile as their primary gaming device
- Player attitudes toward mobile game discovery, spending and privacy in the gaming space



Mobile gaming presents great opportunities, but new regulations and tough competition require knowledge of the latest trends and strategies to ensure success.

Overview

67% of adults played video games on their mobile devices in the past three months, and mobile is known as the widest spread gaming option globally. The Apple brand leads as the go-to product of choice with 54% of players, while Samsung branded mobile products follow at 44%. However, from an operating system perspective, Android is the more widely adopted with 57% of gamers using a form of Android OS, compared to 54% for iOS.

The mobile gaming industry's revenue is expected to increase by +0.8% in 2023 despite policy changes implemented by Apple and Google that have impeded user acquisition, indicating

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that the industry will remain resilient despite the constraints. A surge in mobile advertising expenditure in Q1 2023 further demonstrates the industry's strength and stability.

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Report Content

EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Global video game market size
- Market predictions
- Opportunities

CONSUMER INSIGHTS

Consumer fast facts

Spending on mobile games

- In-game spending rebounds from last year's declines
 - Graph 1: monthly spending on mobile games, 2020-23
- Ad engagement rewards that compare favorably to a players' personal spending will be looked upon more favorably
 - Graph 2: mobile game spending, by generation, 2023
- Skipping the Amazon Appstore on Android could mean missing revenue
 - Graph 3: mobile game spending, by mobile brands used, 2023

Spending on mobile gaming content

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 - Graph 4: participation in mobile gaming activities in the past year, 2023
- Paying upfront to get the latest and greatest games is for younger players
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 - Graph 8: participation in mobile gaming activities in the past year, by gamer segments, 2023

Mobile game abandonment

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- Player motivations can help explain and combat game abandonment
 - Graph 10: mobile game abandonment, by gamer segments, 2023

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- Players who engage most frequently can demand new content and change, which may be off-putting to other players if not carefully considered
 - Graph 11: mobile game abandonment, by mobile gaming frequency, 2023

Mobile game lifespans

- Mobile games that beat the odds and become popular are rare and worth the effort to partner with
 - Graph 12: time it takes to decide if a game is a good fit or worth playing after downloading and playing for the first time, 2023
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 - Graph 13: time it takes to decide if a game is a good fit or worth playing after downloading and playing for the first time, men vs women, 2023
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Launch activity and innovation

- A titanium gaming-powerhouse, movie-camera phone?
- Spooky gaming franchise turns to new interactive narrative streaming series on mobile just in time for Halloween

Marketing and advertising

- Mobile games own the "Fastest to reach 150 million downloads" list
- \$60 prices will shock gamers used to freemium
- Unity's pricing blunder is a sign of deep disfunction within the game engine company's business model

Opportunities

- Popular mobile titles may be primed to grow into broader transmedia franchises
- Players flock to mobile games with console quality
- Niantic continues to specialize in location data-based gaming revenue

THE MARKET

Market context

- US economic indicators continue to trend positive even as costs remain high

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