Games Marketing Insights for 2021

Insights to Inform Game Development, Growth and Monetization

FACEBOOK GAMING | FACEBOOK IQ

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Introduction

When we published the inaugural Facebook Gaming report in November 2019, our goal was to offer insights and analysis on key trends, and ultimately provide a trajectory for the year ahead. However, with the COVID-19 outbreak, the gaming industry, like all industries, faced formidable challenges.

We saw an unprecedented surge in consumer demand and disruption to previous consumption habits as people looked for new forms of entertainment and ways to stay connected with others. More people were playing, watching and streaming than ever before, bringing in new gamers as well as re-engaging lapsed players.

Developers, publishers and marketers have sought to understand evolving gaming motivations, drive new user acquisition, retain player engagement and ultimately understand how this global macro shift will affect gaming business health long term.

To help address these goals and provide insights to inform the year ahead, we conducted new research into player behavior, including their motivations, preferences and habits. We illustrate the increasingly important role of community, especially in the current landscape. Finally, we take a broader look at general consumer behavior and how, in a world that's becoming increasingly platform agnostic, gaming companies must meet the players where they are.

Although we may face more uncertainty in the months ahead, now more than ever, we look forward to continued work with our gaming industry partners as we build the world's gaming community.

Executive summary

2020 brought new and different gamers

- The number of people playing mobile games significantly increased across the globe as a result of COVID-19.
- The increase doesn't seem temporary.
- Many mobile gamers who started playing after the initial COVID-19 outbreak are still playing today.
- 70% of people report spending more time on mobile devices.

Demographics, behaviors, and preferences change

- New mobile gamers (people who started playing after the outbreak) are significantly younger than existing players (people who were playing before) in the US, UK and Germany.
- New mobile gamers show more "core" behaviors in terms of genre preferences, engagement, and propensity to play non-mobile games.
- South Korea is an anomaly; new mobile gamers are older and prefer more casual genres.
- Familiarity is becoming increasingly important for mobile game discovery with only a quarter (or less) of people saying they've tried mobile games they've never heard of.
- Community activities outside of gameplay increased throughout 2020 with streaming platforms seeing record viewing hours.
- New mobile gamers still prefer to play solo, but they're more likely to engage with multiplayer and social features than existing players.

Purchasing behavior shifts

- In all countries, new mobile gamers spend more money in-game than existing players.
- Existing gamers are more engaged than before COVID-19, yet less likely to report spending money on mobile games compared to before the outbreak.
- Online purchases grew as consumers expressed concern about going into physical stores.

The influx of new mobile gamers

With new and existing players turning to gaming en masse, we wanted to understand more about these players. How old are they? Why did they start playing games? What genre do they prefer? Are they spending more or less now than they did before COVID-19?

To answer these questions we commissioned a survey across 9 markets, to determine behavioral trends since the onset of COVID-19.

Throughout this section, we'll look at the findings; habits, motivations, and preferences of new* and existing players** across 4 key markets (UK, US, South Korea and Germany) including time spent across other gaming devices, monetization behaviors, and social engagement.

Study design/methodology

SURVEY RESPONDENTS

13,246

COUNTRIES ANALYZED

United States (US), United Kingdom (UK), Canada (CA), France (FR), Germany (DE), South Korea (KR), Japan (JP), Vietnam (VN), Brazil (BR)

TIME PERIOD

July 2020 (except for Brazil when data was collected in October 2020)

COUNTRY DATA PRESENTED IN REPORT

Germany (DE), South Korea (KR), United States (US), United Kingdom (UK)

COHORTS

All participants were divided into one of 2 cohorts:

- ***New players:** Didn't play mobile games before the initial peak of the pandemic, and continued to play at least an hour a week (July 2020)
- ****Existing players:** People who played mobile games both before the initial peak of the pandemic and continued to play at least an hour a week (July 2020)

There are millions more players

Shelter-in-place and physical distancing measures have led to a surge of new gamers as people look for new forms of entertainment. To understand the impact, it's important to look at how many more people are playing games since the beginning of COVID-19.

GAMING AUDIENCES GROW SINCE MARCH 2020

28M NEW GAMERS
US
28% ↑
mobile gaming audience growth

8.6M NEW GAMERS
UK
50% ↑
mobile gaming audience growth

9.4M NEW GAMERS
S.KOREA
34% ↑
mobile gaming audience growth

6.5M NEW GAMERS
GERMANY
25% ↑
mobile gaming audience growth

NEW GAMERS: A SNAPSHOT

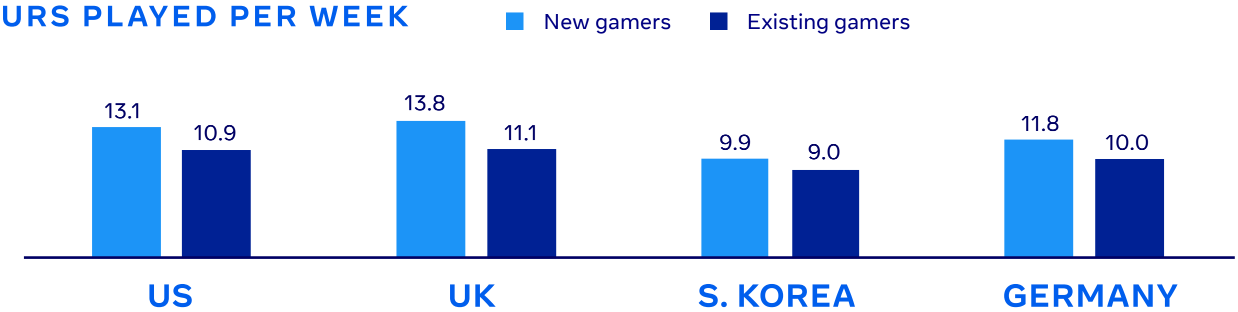
- In the US, UK, and Germany, new gamers are significantly younger than existing players. In South Korea on the other hand, new gamers are significantly older than existing.
- The gender distribution of both cohorts is similar in all markets.
- In the US, new gamers are more likely to own a gaming console (new gamers 64% v. existing gamers: 58%) This is also true in Germany (55% and 50%). There were no differences in the UK (66% v. 64%), and in South Korea existing players were more likely to own one (34% vs. 42%).
- In the US and UK, new gamers were more likely to spend time playing video games on a PC or gaming console.

Source: "Mobile Gaming Behavior Post COVID-19" by Interpret (Facebook IQ-commissioned online survey of 13,246 mobile gamers ages 18+ across BR, CA, DE, FR, JP, KR, UK, US, VN Jul/Oct 2020)

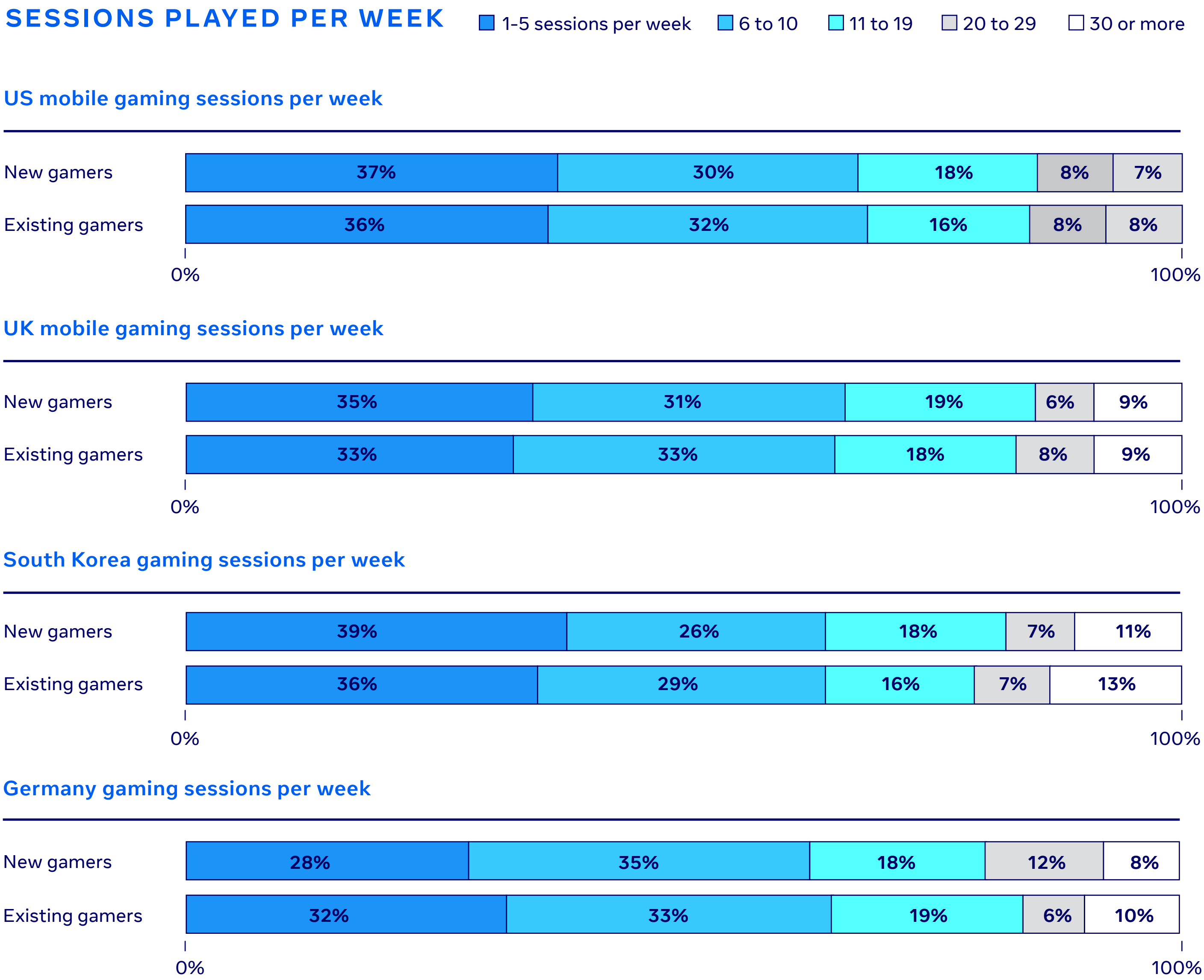
New gamers play more hours a week than existing players

Although new and existing gamers report playing a similar number of sessions per week, new gamers play more hours per week than existing players in all markets.

HOURS PLAYED PER WEEK



SESSIONS PLAYED PER WEEK



Source: "Mobile Gaming Behavior Post COVID-19" by Interpret (Facebook IQ-commissioned online survey of 13,246 mobile gamers ages 18+ across BR, CA, DE, FR, JP, KR, UK, US, VN Jul/Oct 2020)

New gamers like "core" genres

New gamers' favorite genres skewed significantly more core than existing players in the US and the UK, compared to Germany and South Korea, where they liked similar genres.

FAVORITE GENRES

US

NEW GAMERS		EXISTING GAMERS	
Puzzle	23%	Puzzle	33%
Shooter	20%	Card/Casino	17%
Card/Casino	15%	Shooter	8%
Racing	6%	Simulation	7%
RPG	6%	Strategy	7%

UK

NEW GAMERS		EXISTING GAMERS	
Puzzle	33%	Puzzle	41%
Shooter	12%	Simulation	9%
Simulation	9%	Shooter	8%
Sports	8%	Sports	7%
Strategy	7%	Strategy	6%

SOUTH KOREA

NEW GAMERS		EXISTING GAMERS	
Puzzle	22%	Puzzle	24%
RPG	13%	RPG	13%
Simulation	9%	Shooter	10%
Card/Casino	9%	Strategy	9%
Racing	8%	Sports	9%

GERMANY

NEW GAMERS		EXISTING GAMERS	
Puzzle	24%	Puzzle	33%
Simulation	12%	Card/Casino	13%
Shooter	11%	Simulation	10%
Strategy	8%	Strategy	8%
Card/Casino	8%	Hypercasual	7%

Source: "Mobile Gaming Behavior Post COVID-19" by Interpret (Facebook IQ-commissioned online survey of 13,246 mobile gamers ages 18+ across BR, CA, DE, FR, JP, KR, UK, US, VN Jul/Oct 2020)

New gamers are open to social activity

Players across all markets say they prefer single player mobile gaming experiences to multiplayer. Nonetheless, new gamers are more open to cooperative, multiplayer experiences and chatting with others in-game compared to existing players.

PLAYERS' SOCIAL PREFERENCES

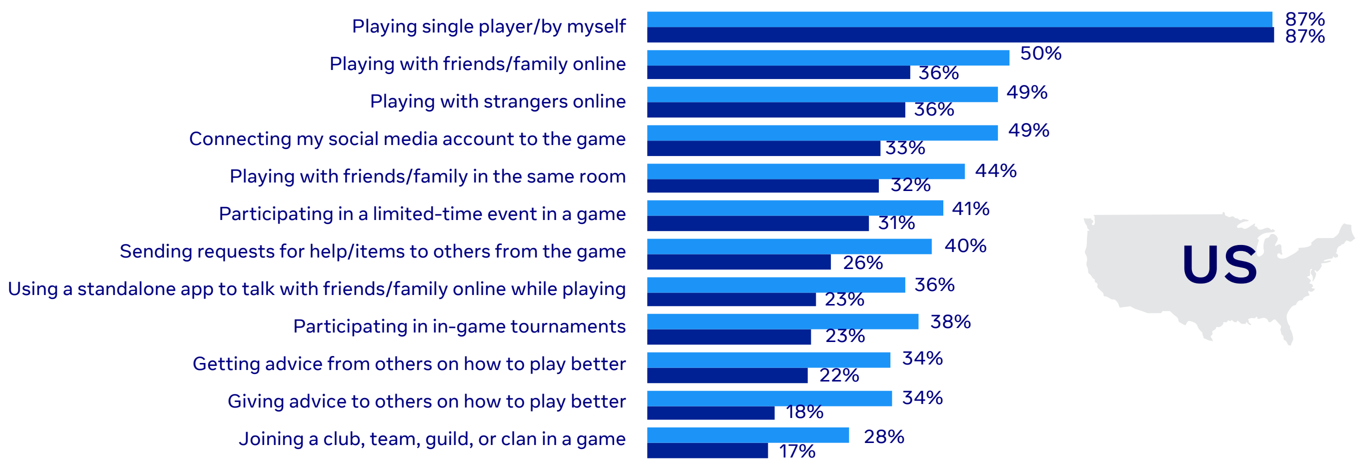
New gamers / Existing gamers

	US		UK		SOUTH KOREA		GERMANY	
	New gamers	Existing gamers	New gamers	Existing gamers	New gamers	Existing gamers	New gamers	Existing gamers
I prefer playing multiplayer/ online modes to single player	33%	25%	30%	21%	41%	34%	33%	24%
I prefer being part of a team when playing against others	54%	41%	49%	42%	44%	39%	50%	45%
I prefer chatting with others when playing games	38%	29%	32%	24%	33%	26%	29%	19%

Across the US, UK, and Germany, new gamers were significantly more likely to engage in social activities within the game, such as playing with others online, participating in in-game tournaments, or getting/giving advice on how to play better. In South Korea, the cohorts engaged equally in these types of activities.

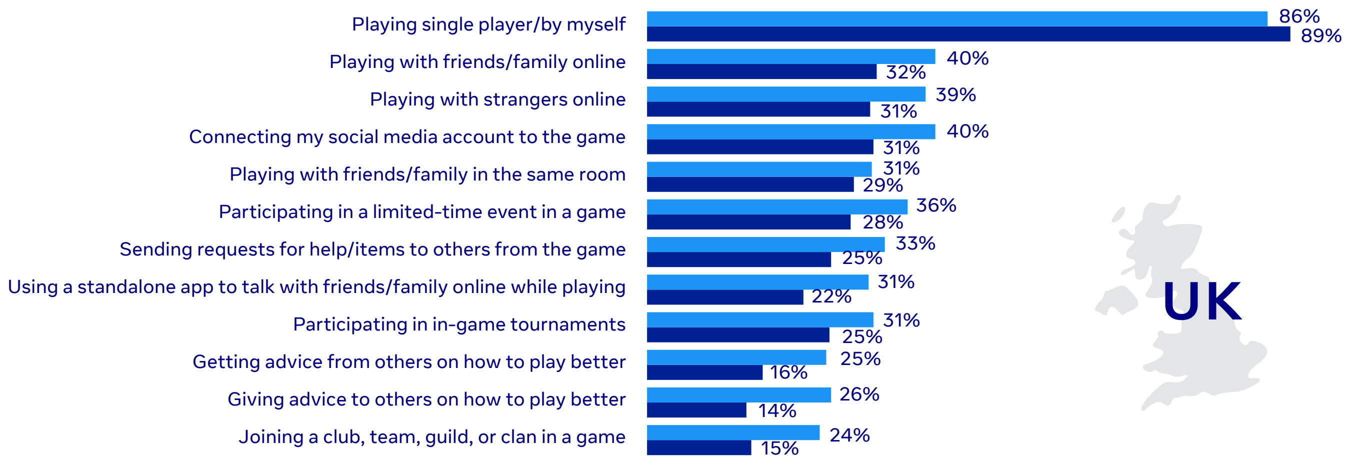
WEEKLY GAMING ACTIVITIES

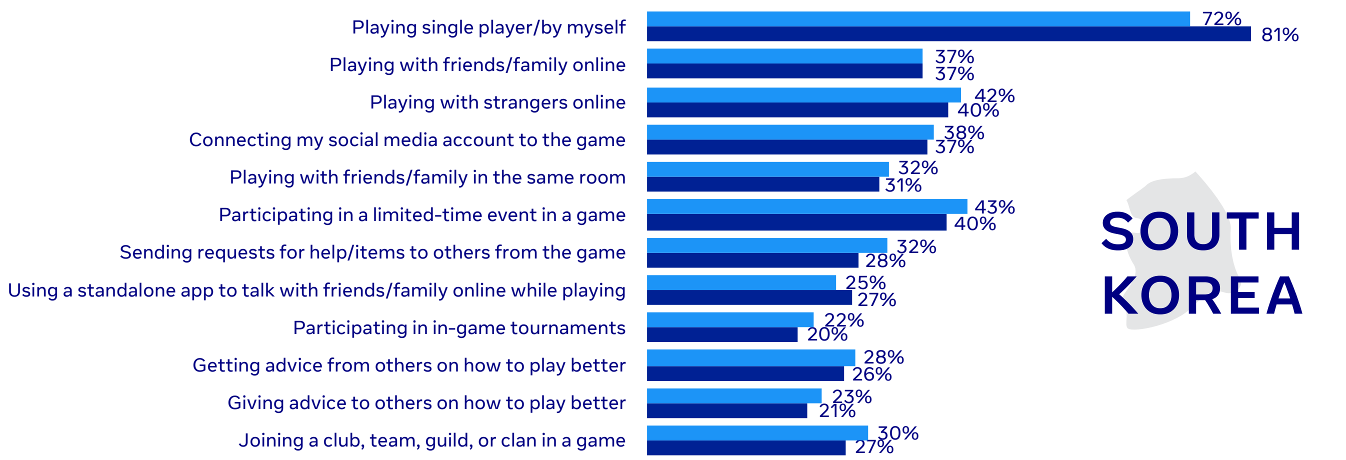
New gamers / Existing gamers

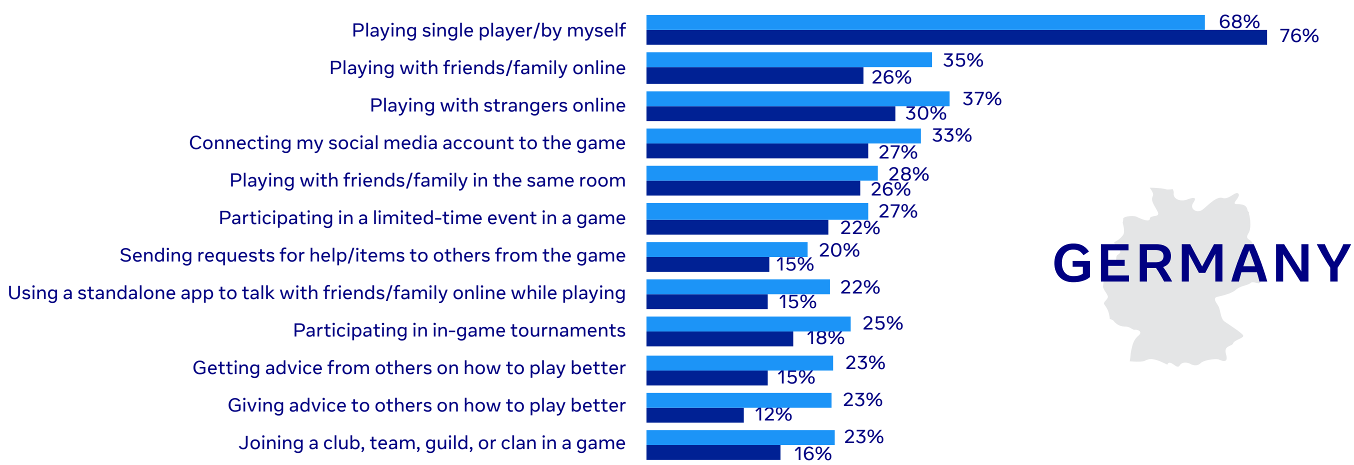


WEEKLY GAMING ACTIVITIES

New gamers   Existing gamers







What new and existing mobile gamers have in common

While there are 2.5 billion gamers in the world, representing a diverse range of interests, behaviors and attributes, our research found some interesting similarities among new and existing gamers. It also highlighted regional nuances, especially when it comes to the reasons people spend money on mobile games.

Both cohorts play for similar reasons

Across all markets, new and existing gamers cited similar reasons for playing mobile games. Relieving stress, passing time, and generating a sense of accomplishment were consistently the top 3 reasons, and reflected what we found in our Genre and Great Games report, published in 2020.

Perhaps understandably, the main reason new gamers started playing during the pandemic was because they had more free time (41%). Other reasons included looking for ways to destress (16%), and it was simple and easy to start playing (11%).

WHY PEOPLE PLAY MOBILE GAMES

NEW GAMERS' TOP 5 REASONS FOR PLAYING MOBILE GAMES

US

- **68%** Relieving stress
- **62%** Passing time
- **57%** Feeling accomplished
- **46%** Being dazzled by something unique
- **46%** Immersing myself in a world

UK

- **62%** Relieving stress
- **55%** Passing time
- **51%** Feeling accomplished
- **38%** Defeating others in competition
- **38%** Immersing myself in a world

SOUTH KOREA

- **52%** Relieving stress
- **34%** Feeling accomplished
- **31%** Passing time
- **26%** Being dazzled by something unique
- **25%** Connect me to a passionate subject

GERMANY

- **60%** Passing time
- **56%** Relieving stress
- **46%** Feeling accomplished
- **36%** Immersing myself in a world
- **34%** Defeating others in competition

Source: "Mobile Gaming Behavior Post COVID-19" by Interpret (Facebook IQ-commissioned online survey of 13,246 mobile gamers ages 18+ across BR, CA, DE, FR, JP, KR, UK, US, VN Jul/Oct 2020)

WHY PEOPLE PLAY MOBILE GAMES

EXISTING GAMERS' TOP 5 REASONS FOR PLAYING MOBILE GAMES

US

62% Relieving stress

56% Passing time

43% Feeling accomplished

33% Defeating others in competition

31% Being dazzled by something unique

UK

52% Passing time

51% Relieving stress

38% Feeling accomplished

30% Immersing myself in a world

26% Defeating others in competition

SOUTH KOREA

49% Relieving stress

28% Passing time

26% Feeling accomplished

22% Being dazzled by something unique

22% Defeating others in competition

GERMANY

57% Passing time

43% Relieving stress

36% Feeling accomplished

26% Immersing myself in a world

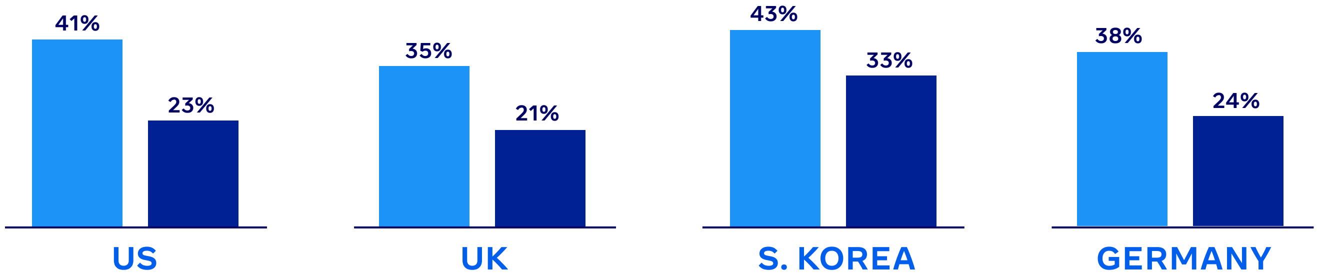
26% Being dazzled by something unique

Spending habits vary more by market than cohort

Compared to existing players, new gamers were significantly more likely to report spending money on mobile games after the initial COVID-19 peak in all markets. They also reported spending more money per month on mobile games. However, when it comes to the reasons why people spend money, there was more variety across markets than between the cohorts, some of which was tied to genre. In the US and UK, people were particularly motivated to pay to remove ads. In South Korea and Germany, people said they pay to avoid waiting or to skip difficult points (more typical of puzzle games).

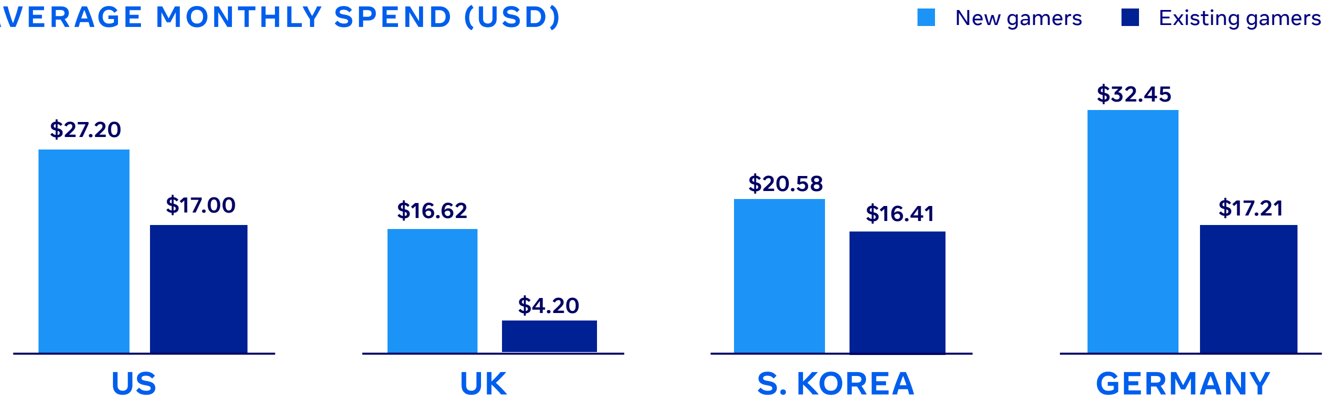
PERCENTAGE OF GAMERS WHO SPEND MONTHLY

New gamers   Existing gamers



Source: "Mobile Gaming Behavior Post COVID-19" by Interpret (Facebook IQ-commissioned online survey of 13,246 mobile gamers ages 18+ across BR, CA, DE, FR, JP, KR, UK, US, VN Jul/Oct 2020)

AVERAGE MONTHLY SPEND (USD)

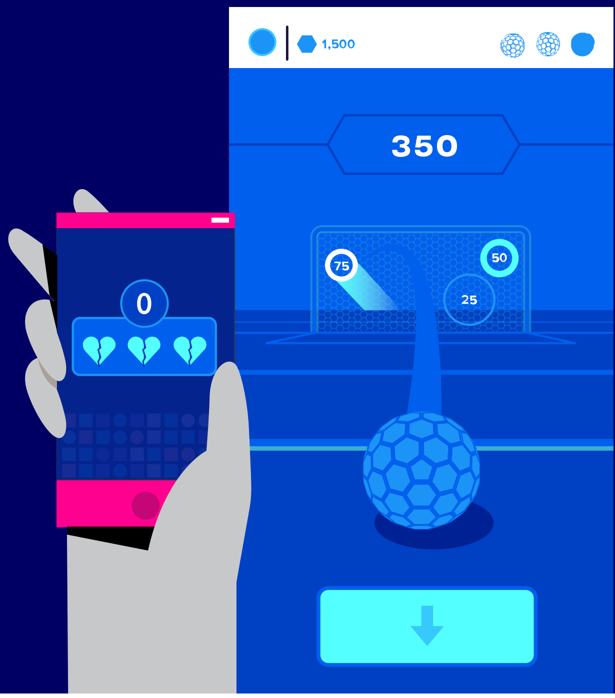


TOP REASONS FOR SPENDING MONEY ON GAMES

NEW GAMERS TOP 3 REASONS FOR SPENDING				EXISTING GAMERS TOP 3 REASONS FOR SPENDING		
41% To personalize my character/ account	42% To complete a game item/ gear collection	43% To make the game exciting again	**US**	41% To make the game exciting again	36% To complete a game item/ gear collection	33% To remove ads
36% To stay competitive against others	40% To remove ads	45% To make the game exciting again	**UK**	39% To remove ads	36% To complete a game item/ gear collection	32% To make the game exciting again
37% To not have to wait to keep playing	40% To complete a game item/ gear collection	43% To advance, beat, or skip a difficult point	**SOUTH KOREA**	50% To complete a game item/ gear collection	45% To advance, beat, or skip a difficult point	36% To personalize my character/ account
31% To complete a game item/ gear collection	31% To advance, beat, or skip a difficult point	34% To not have to wait to keep playing	**GERMANY**	40% To not have to wait to keep playing	34% To advance, beat, or skip a difficult point	31% To make the game exciting again

Source: “Mobile Gaming Behavior Post COVID-19” by Interpret (Facebook IQ-commissioned online survey of 13,246 mobile gamers ages 18+ across BR, CA, DE, FR, JP, KR, UK, US, VN Jul/Oct 2020)

All players prefer ad-supported games



Previous research has shown that people are open to seeing ads in games. In our survey, mobile gamers across all markets said they prefer free-to-play, ad-supported games. In the US, UK, and Germany, the preference for ad-supported models was stronger in existing players. New players, on the other hand, were more open to alternative monetization models such as in-app purchases.

PLAYERS' MONETIZATION PREFERENCES

■ New gamers ■ Existing gamers

	US		UK		SOUTH KOREA		GERMANY	
	New gamers	Existing gamers	New gamers	Existing gamers	New gamers	Existing gamers	New gamers	Existing gamers
Ad-support models	35%	43%	42%	48%	35%	34%	39%	49%
Free-to-play with IAP	25%	24%	24%	19%	30%	31%	21%	21%
Game purchase, no ads	19%	16%	15%	15%	17%	17%	16%	16%
Battle pass	13%	12%	14%	14%	11%	13%	20%	12%
Monthly fee for game bundles	8%	6%	5%	6%	8%	5%	4%	3%

Source: "Mobile Gaming Behavior Post COVID-19" by Interpret (Facebook IQ-commissioned online survey of 13,246 mobile gamers ages 18+ across BR, CA, DE, FR, JP, KR, UK, US, VN Jul/Oct 2020)

Gamers want to see gameplay in ads

When it comes to gaming ads, both cohorts of gamers have similar preferences: everyone prefers to see the main gameplay and characters/story. There are some nuances by market consistent with what we saw in our Genre and Great Games report. For example, in South Korea – a strategy and RPG-heavy market – players prefer to see character progression.

AD PREFERENCES

NEW GAMERS' TOP 3 REASONS FOR SPENDING

Market			
US	23% Showcases the characters/ story	24% Shows the high scores your can achieve	34% Showcases the main gameplay
UK	21% Showcases the game's art style	25% Showcases the characters/ story	44% Showcases the main gameplay
SOUTH KOREA	26% Showcases the progression of your characters	31% Showcases the characters/ story	44% Showcases the main gameplay
GERMANY	20% Showcases the control mechanics	31% Showcases the characters/ story	40% Showcases the main gameplay

EXISTING GAMERS' TOP 3 REASONS FOR SPENDING

Market			
US	46% Showcases the main gameplay	29% Showcases the characters/ story	20% Showcases the game's art style
UK	55% Showcases the main gameplay	27% Showcases the characters/ story	21% Showcases the game's art style
SOUTH KOREA	43% Showcases the main gameplay	30% Showcases the characters/ story	24% Showcases the progression of your characters
GERMANY	49% Showcases the main gameplay	32% Showcases the characters/ story	20% Showcases the high scores you can achieve

Source: "Mobile Gaming Behavior Post COVID-19" by Interpret (Facebook IQ-commissioned online survey of 13,246 mobile gamers ages 18+ across BR, CA, DE, FR, JP, KR, UK, US, VN Jul/Oct 2020)

Existing players have formed new habits

In addition to trying to understand the differences between new and existing gamers, we also looked at how existing players' behavior has shifted from before COVID-19 to after. We asked gamers to describe the impact of the pandemic on their gaming habits in their own words. Here are a few responses:

> "Instead of meeting friends in person, I've been connecting with them through mobile games. Before COVID, it was about 50-50 split between meeting them in person and connecting with them online. Now, it shifted much more towards the online hangout."
>
> - Participant, South Korea

> "I've started playing mobile games with my children more as we've eased restrictions on their playing time."
>
> - Participant, US

> "It increased it by a significant amount. I started to play every type of game and explored new games on the app store."
>
> - Participant, UK

> "I temporarily played significantly more while working remotely and having shorter workdays. I played partly to kill time. I tried many new games and different concepts. Now I am back to normal."
>
> - Participant, Germany

Existing gamers play more, for longer

In all countries, gamers reported that they currently spend more time gaming than they did pre-pandemic. A large portion of these gamers in each market also reported that their individual gaming sessions are longer (US: 40%, UK: 40%, South Korea: 53%, Germany: 30%).

WEEKLY MOBILE GAMING HOURS PRE- AND POST- MARCH 2020

	US	UK	SK	DE
Pre	9.5	9.7	7.8	9.3
Post	11.1	10.9	9.0	10.0

Source: "Mobile Gaming Behavior Post COVID-19" by Interpret (Facebook IQ-commissioned online survey of 13,246 mobile gamers ages 18+ across BR, CA, DE, FR, JP, KR, UK, US, VN Jul/Oct 2020)

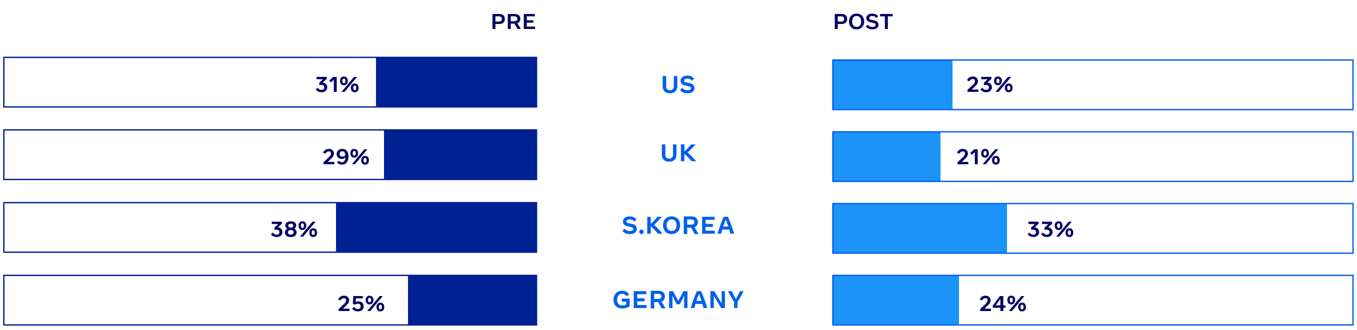
Existing players enjoy solo play

We asked gamers to compare their behavior before and after March 2020 on a number of different gaming activities. In all markets, many gamers reported increasing the time they spent playing single player games specifically (US: 49%, UK: 43%, South Korea: 51%, Germany: 29%). There was also a notable number of gamers who reported spending more time playing games with friends/family members online (US: 30%, UK: 26%, South Korea: 35%, Germany: 21%).

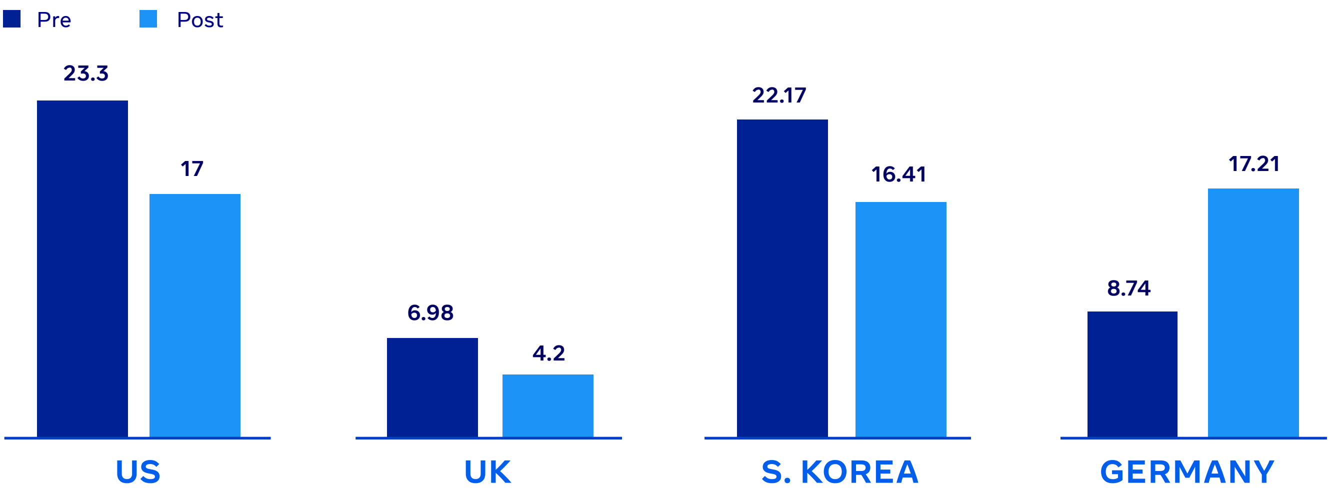
Existing players are spending less

In the US, UK, and South Korea, more gamers reported spending money on a monthly basis before the pandemic. Also in these countries, the gamers reported spending less money per month than before the pandemic. On the other hand, Germans reported being equally likely to spend pre- and post-COVID-19, and actually reported spending more money per month after the pandemic.

PERCENTAGE OF GAMERS WHO SPENT MONTHLY PRE- AND POST-MARCH 2020



AVERAGE MONTHLY SPEND PRE- AND POST-MARCH 2020 (USD)



Gaming communities gather in Groups and live streams

Community has always been a huge part of gaming. As we saw in our research, millions more people are playing games and this, in turn, is contributing to an even greater gaming community. With the influx of new players, general gaming activity outside of in-game saw an uptick in tandem. Even in the sunset year of the current generation of consoles, the number of gaming Facebook Groups grew, streaming sites saw unprecedented surges and anticipation for new releases reached fever pitch.

Live-streaming sites surpass records

Live streaming has been on the rise for many years, including non-gaming content. But just as the number of new gamers increased during the pandemic, the live-streaming sector also saw exponential growth. Streaming platforms such as Twitch, YouTube Gaming and Facebook Gaming all clocked record viewing hours as people went online to seek alternative entertainment.

STREAMING NUMBERS INCREASE[1]

1 billion

Facebook Gaming hours surpassed 1 billion for the first time in Q3 2020. Hours watched were at half a billion in Q4 of 2019, and were at 269 million in the quarter prior.

1.7 billion

YouTube Gaming hours watched continued to steadily rise to 1.7 billion in Q3, up from 1.5 billion in the prior quarter and up from 724 million in Q3 of last year.

4.7 billion

Twitch hours watched in July through September of 2020 reached 4.7 billion, up from 2.8 billion hours watched in the same quarter last year.

Momentum maintained past the initial peak

Achieving headline-grabbing numbers is one thing, but maintaining momentum is another. The appetite for live-streaming remains strong. From July to September 2020, people watched 7.46 billion hours of content across all live streaming platforms, according to Streamlabs, who reported that the live-streaming industry grew by 91.8% year over year.[2]

Source: [1,2]"Streamlabs & Stream Hatchet Q3 2020 Live Streaming Industry Report," by Ethan May, October 2020

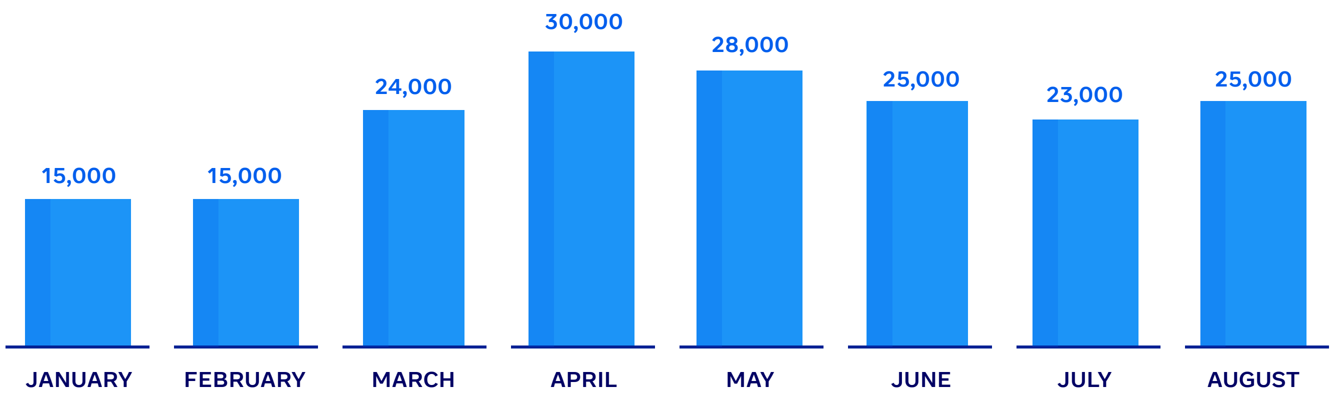
Gaming Groups grow

Active members in gaming Groups on Facebook, as well as the number of Groups, grew during the months following the outbreak as people connected with their gaming communities. Currently, there are more than 230 million people who are active members in over 630,000 gaming Groups on Facebook per month.[1]

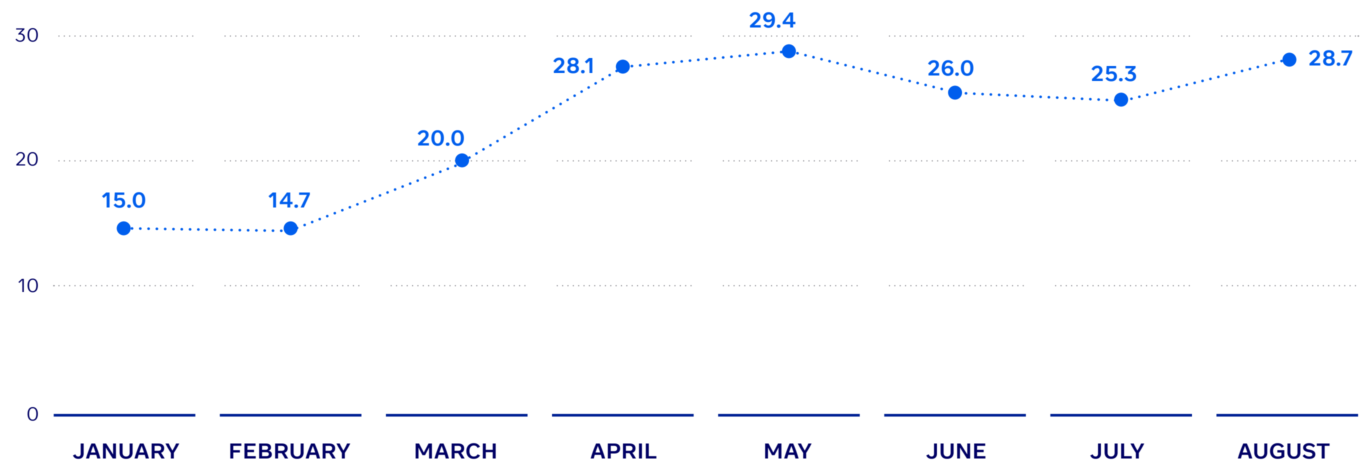
The increasing engagement with Groups is an opportunity to create two-way dialogue with players, and foster and encourage community while creating organic conversations. It's a low-cost way to engage with users to monitor engagement and title resonance.

From January to August 2020, over 185,000 new gaming Groups were created and over 130 million members joined gaming Groups. In the US, UK, and Germany, this increase was largely composed of 25-34 year olds while in South Korea, more than half of new members were between 18-24.[2]

NUMBER OF GAMING GROUPS CREATED IN 2020



NUMBER OF CONSUMERS WHO JOINED GAMING GROUPS IN 2020



Source: [1]Facebook Internal Data, August 2020
Source: [2]Facebook Internal Data, January - August 2020

Shifts in discovery and purchase behaviors

Technology developments in recent years have led players to expect seamless experiences, regardless of the device. As a result, gaming companies are constantly innovating, whether it's through cloud gaming, supporting cross-platform play, or expanding a console title or franchise to mobile and PC. In this section, we look at how consumer behavior in general changed in 2020 and what impact physical distancing and shelter-in-place measures have had on e-commerce.

Rise of online purchases

When we look at game sales, we know that digital sales have been growing in recent years. However, shelter-in-place measures emphasized the fact that people can and will buy online.

Despite safety measures being put in place in stores, 89% of consumers globally – not just gamers – say they are at least somewhat concerned to go into a physical retail store to shop because of the pandemic. This has naturally led to a rise in online shopping and 37% of consumers globally say they've ordered products online that they would have typically purchased in a store[1].

DEVICE WHERE CONSOLE GAMERS PURCHASE GAMES

	US[2]	UK[3]	SOUTH KOREA[4]	GERMANY[5]
Computer	42%	43%	56%	42%
Mobile	33%	29%	52%	31%
Smart speaker	14%	9%	19%	9%
On a game console while using it	48%	40%	39%	47%
In-person	44%	35%	30%	42%
Over the phone	16%	9%	12%	8%
Other	0%	1%	0%	0%

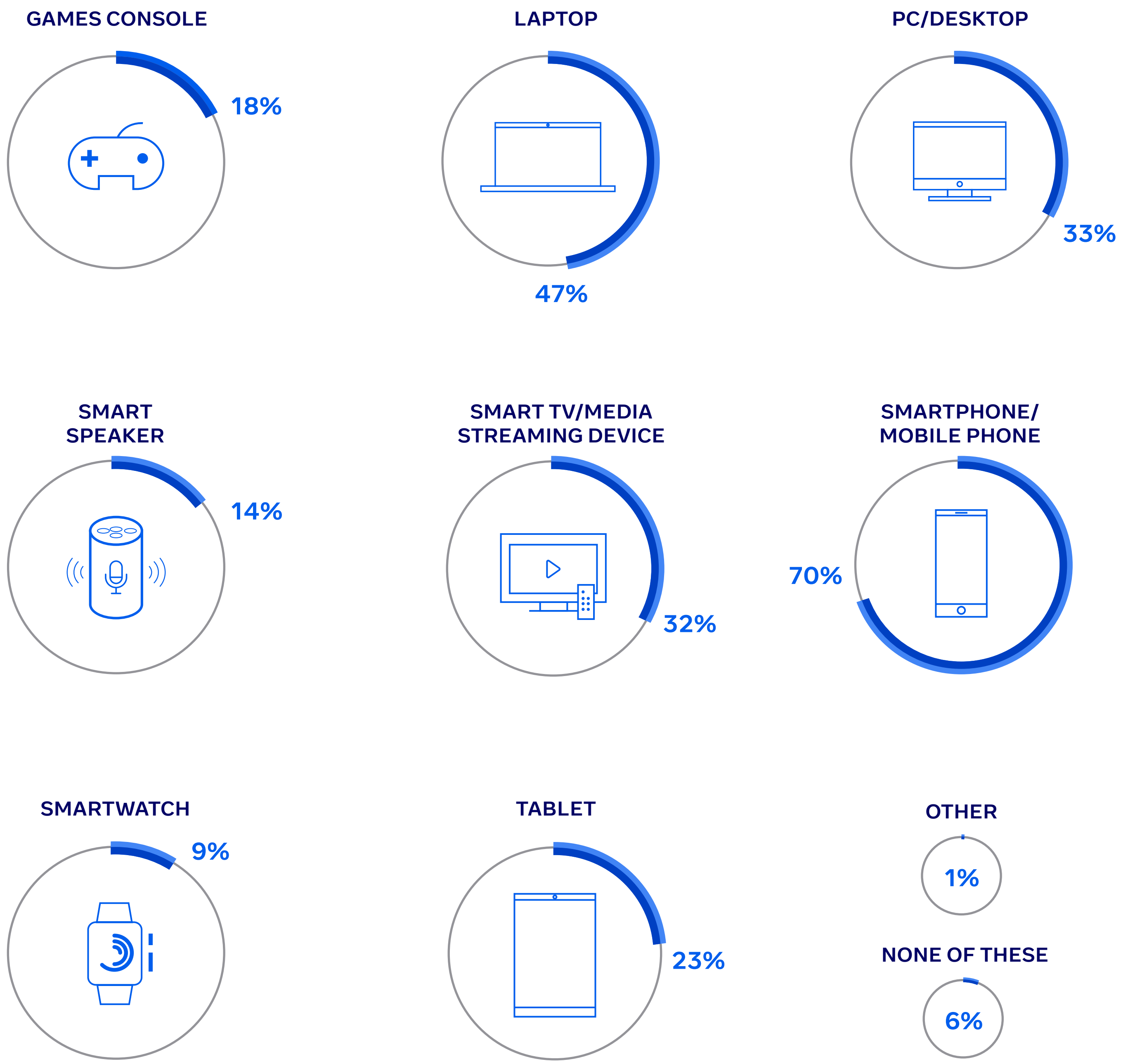
So while in-person game sales continue, the general shift to online shopping (not just gaming) will continue and console marketers should meet the players where they are...online. In fact, 49% of people say they expect to shop online more frequently after the pandemic is over.[6]

[1] "Industry Micro-Shifts Monthly Tracker" by Kantar Profiles (Facebook-commissioned online survey of 96,938 adults across AU, BR, CA, DE, ES, FR, HK, ID, IT, JP, KR, MX, TW, UK, US), May-Aug 2020. Unless otherwise specified, data is a cross-country average across all 16 markets.
[2] US: Console Games Consumer Journey by Kantar Profiles (Facebook-commissioned online survey of 1067 respondents ages 18-64, United States 2020)
[3] UK: Console Games Consumer Journey by Kantar Profiles (Facebook-commissioned online survey of 1012 respondents ages 18-64, United Kingdom 2020)
[4] South Korea: Console Games Consumer Journey by Kantar Profiles (Facebook-commissioned online survey of 1032 respondents ages 18-64, South Korea 2020)
[5] Germany: Console Games Consumer Journey by Kantar Profiles (Facebook-commissioned online survey of 1051 respondents ages 18-64, Germany 2020)
[6] Global Web Index Coronavirus Research July 2020

People spend more time on mobile devices

Not only have online shopping behaviors shifted, 70% of people reported spending more time on their mobile devices since the start of COVID-19.[1] As consumers spend more time searching and discovering products through mobile, navigating shopping risks remain key as consumers face new friction points in-store and online making an always-on mobile-first presence imperative for discovery.

DEVICE(S) PEOPLE HAVE BEEN SPENDING MORE TIME USING SINCE THE START OF COVID-19[2]



Storytelling and familiarity fuel growth

With more than 350,000 mobile games available to download[1], getting your game discovered is no easy feat. Only a quarter of people in the UK and Germany reported trying a game they had never heard of, and this figure continues to decline in the US (23%) and South Korea (11%). This all shows that while title familiarity is a key factor for console gaming, it's just as important for mobile.

HOW LONG BEFORE PEOPLE TRIED A MOBILE GAME VERSUS WHEN THEY FIRST HEARD OF IT BY NAME

	US[2]	UK[3]	SOUTH KOREA[4]	GERMANY[5]
Over 5 years before I tried it	7%	5%	9%	7%
1 to 5 years before I tried it	10%	11%	16%	10%
3 to less than 12 months before I tried it	10%	13%	14%	11%
1 to less than 3 months before I tried it	12%	12%	14%	10%
1 to less than 4 weeks before I tried	15%	14%	14%	15%
1 to 6 days before I tried	22%	21%	23%	22%
I had never heard of this mobile game before the day I tried it	23%	25%	11%	25%

[1]Number of available gaming apps in the Apple App Store from 1st quarter 2015 to 2nd quarter 2020, Statista, September 2020
[2]Mobile Games Consumer Journey by Kantar Profiles (Facebook-commissioned online survey of 3073 respondents ages 18-64, United States 2020)
[3]Mobile Games Consumer Journey by Kantar Profiles (Facebook-commissioned online survey of 3072 respondents ages 18-64, United Kingdom 2020
[4]Mobile Games Consumer Journey by Kantar Profiles (Facebook-commissioned online survey of 3079 respondents ages 18-64, South Korea 2020
[5]Mobile Games Consumer Journey by Kantar Profiles (Facebook-commissioned online survey of 3087 respondents ages 18-64, Germany 2020

Familiarity also drives purchases

Not only can title/brand recognition lead to discovery, it also drives sales. Mobile gaming can learn more from console gaming where we already see sequel and title familiarity among top influential factors when deciding to purchase a new game.

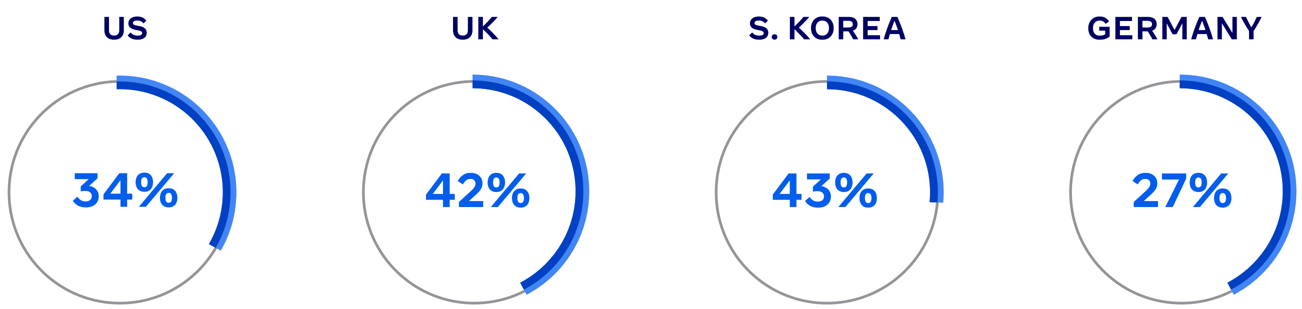
SEQUEL AND TITLE FAMILIARITY, AS WELL AS STUDIO AND IP RANK AS FACTORS INFLUENTIAL TO CONSOLE GAMERS WHEN PURCHASING A NEW CONSOLE GAME

	US		UK		SOUTH KOREA		GERMANY	
	Rank	%	Rank	%	Rank	%	Rank	%
Game Developer/Studio	10	29%	10	26%	9	28%	11	23%
Based on IP I know	12	22%	12	19%	11	23%	12	16%
Sequel familiarity	5	36%	3	35%	7	31%	3	40%
Title familiarity	3	48%	6	32%	5	33%	4	34%

*Ranking is out of 14 influential factors

And we see this pay off with console gamers saying the most recent game they purchased was the latest edition of a game franchise owned before.

THE MOST RECENT GAME PURCHASED WAS THE LATEST EDITION OF A GAME FRANCHISE YOU HAD OWNED BEFORE



Takeaways

01

Connect with new gamers, they're here to stay

Design and develop your games with these new audiences in mind, taking into account their core tendencies (in all markets except South Korea). This also means marketers need to think about how their marketing activities and strategies should shift to reach these new audiences such as broadening campaign targeting and developing creative that will capture and engage to speak to a broader audience.

02

Meet behavior shifts with a mixed model

COVID-19 has led to an unprecedented surge in the number of people playing mobile games compared to pre-pandemic, but decreased gamers' likelihood to spend money. Given gamers are open to seeing ads, as well as make in-app purchases, consider adopting a mixed monetization model to take advantage of this increased engagement.

03

Explore opportunities out of game

More people are taking part in in-game events and out-of-game activities, especially among the new gamer cohort. This creates new opportunities for you to embrace a constant beat in your marketing strategies. Join the conversations where gaming communities are gathering to keep your audiences engaged via in- and out-of-game activities.

04

Create familiarity through awareness, recognition, and distinction

Mobile game marketers can learn from the console industry when it comes to storytelling, taking into consideration that people like to see gameplay in ads. By telling rich stories through immersive experiences and new formats, you can create familiarity, which we know drives discovery. Consider the creative elements in your ads with other creative means of engaging players such as streamer partnerships which have the potential to influence prospective gamers.