Google Play

Mobile gaming in the context of Covid-19

Summary of insights across 10 markets
US, UK, BR, JP, KR, FR, DE, RU, CN, IN

July 2020

Google Play In partnership with Savanta

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Background and methodology

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Research background

Research objectives

- Understand how the context around how lockdowns have impacted mobile gaming behaviours
- Specifically explore:
    - Motivations, gaming occasions, genre preferences, usage of social features, and spend
- Understand any differences between light, medium and heavy players, as well as mobile only and x-platform players
- Understand behaviours of new mobile gamers

Methodology

Google partnered with Savanta to conduct an online survey of mobile gamers across 10 markets, from May 22nd to July 6th 2020.

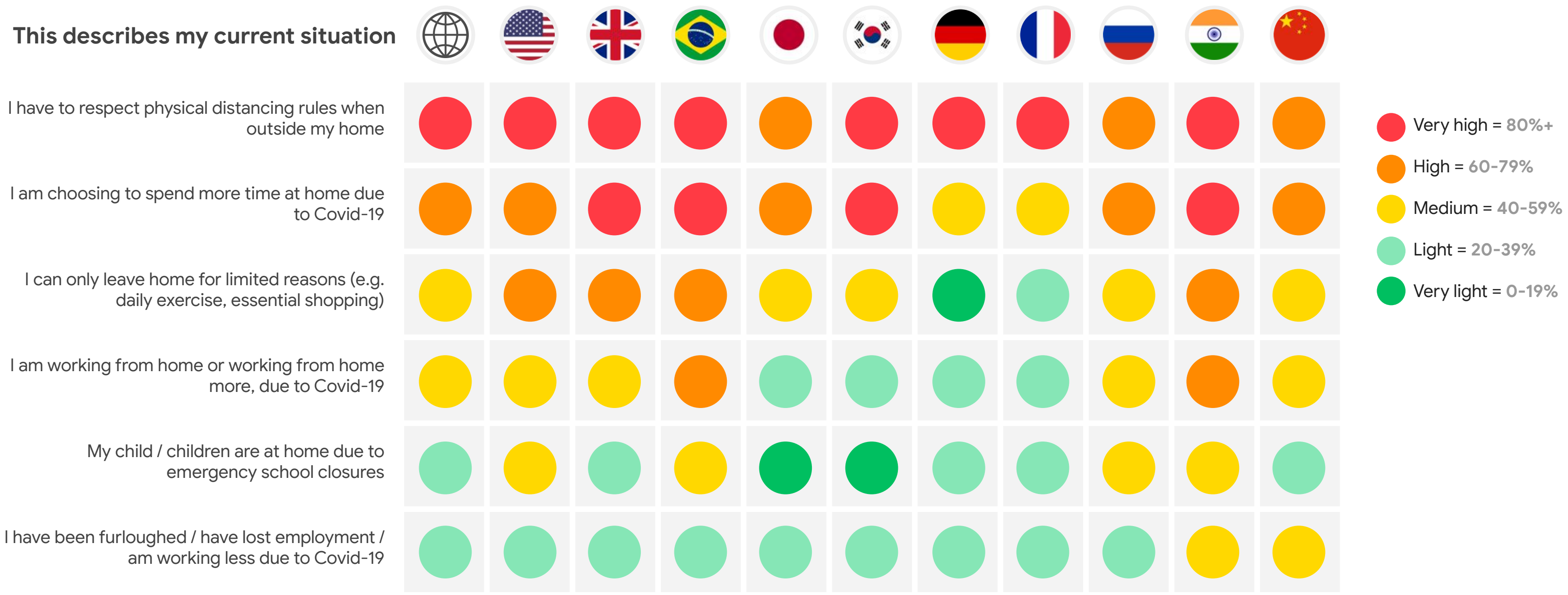
Sample size:
US: 1128, UK: 1103, JP: 1095, KR: 1105, BR: 1165, FR: 1084, DE: 1069, RU: 1101, CN: 2228, IN: 2205
Global figures in the report cover all 10 markets

Played on a smartphone in the last 3 months
Mix of iOS and Android gamers
Mix of x-platform and mobile only gamers
Mix of light (<3 hours per week), medium (3-10 hours per week), and heavy (10+ hours per week)

The sample also includes new mobile gamers who started playing mobile games in the past 3 months

Research background

At the time of the survey, the majority of respondents had been impacted by the lockdown or restrictions in some way.



01
Executive summary

Executive summary

1 More play, and longer sessions

Overall, over two thirds of mobile gamers say they are playing more often than before, and 65% say their sessions are longer.

This holds across countries and demographics, with lower impact where there were limited or no lockdowns, as expected.

Out of home occasions have been replaced by more ad hoc playing during the day and sessions upon waking up. Players also report that notifications are more likely to trigger a gaming session.

2 Social gaming has increased

Whilst entertainment and boredom relief are the key motivations for playing more, over a third of gamers globally are doing so to connect with family and friends.

This is also reflected in the top 3 mobile genres being played more - MOBA, Battle Royale and MMORPGs.

Gamers are mostly looking for new games that are skill based and are quick to pick up and learn- action, arcade and puzzle genres top the list.

3 One third have spent more

Globally, 37% say they have spent more than before. This is not limited to the most engaged gamers - 25% of light gamers say they have done so.

In general, spend to deepen engagement with the game has tended to increase, whereas spend to simply play for longer has dropped in most markets.

Overall, one third say they will continue to spend more - but there are clear market differences - 66% of Chinese gamers vs. 21% of German gamers say they will do so.

4 New gamers plan to continue

New mobile gamers have similar motivations to existing gamers - though they are less interested in simply making progress in the game.

Puzzle games are the most popular genre, except in Korea, Brazil and Germany where the most popular are simulation, word and trivia games respectively.

New gamers are already fairly engaged, with a third already watching gaming content and playing with family and friends. This supports their claim that they will continue to play - overall 40% say they are very or extremely likely to do so.

02

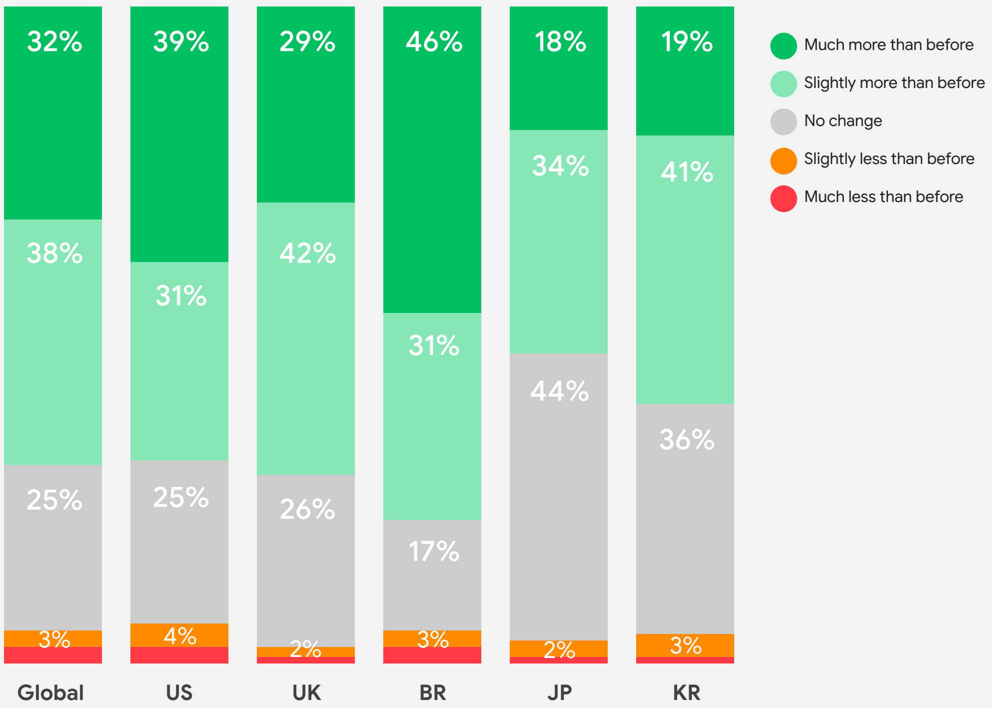
Behaviours & motivations

Globally, 70% of mobile gamers are playing more than before

Globally, **18-34 year olds** are slightly more likely to be playing more than 35-45 year olds, and **male gamers** slightly more than female gamers.

X-platform gamers are also more likely to be playing more on mobile than mobile-only gamers (75% vs 65%).

Change in time spent playing games on mobile compared to before Covid-19



Base: Existing gamers [10932] Q12. In comparison to before Covid-19, are you playing games on a smartphone...?

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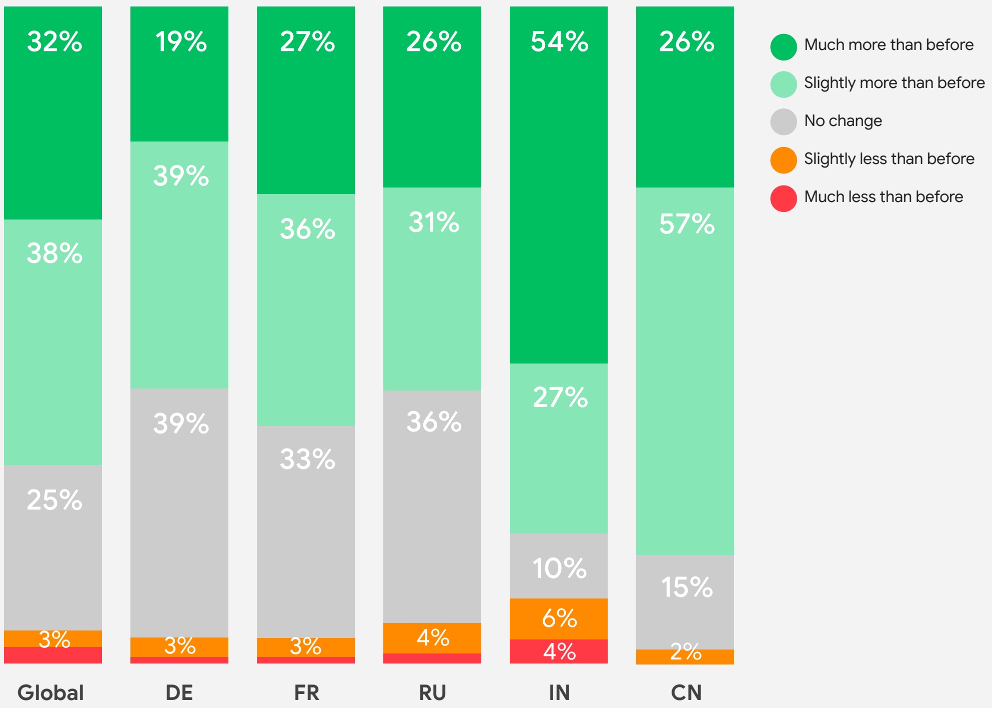
Mobile gamers in China are the most likely to be playing more

Mobile gamers in **Japan**, **Russia**, and **Germany** are the **least likely** across all 10 markets to be spending more time playing.

Change in time spent playing games on mobile compared to before Covid-19



Base: Existing gamers [10932] Q12. In comparison to before Covid-19, are you playing games on a smartphone...?

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Gaming sessions are also longer than before

Globally, **65% of gamers** say their gaming sessions are longer than before.

Longer sessions are reported across gamer types globally - **54% of light gamers, 70% of medium gamers and 73% of heavy gamers** say their sessions are longer.

Across markets, this follows the same pattern as those saying they are gaming more - **Chinese and Indian mobile gamers** are the most likely to be playing longer gaming sessions, while **Japanese and German mobile gamers** are the least likely to do so.

Base: Existing gamers [10932] Q17. In comparison to your situation before Covid-19, are your typical gaming sessions on a smartphone....?

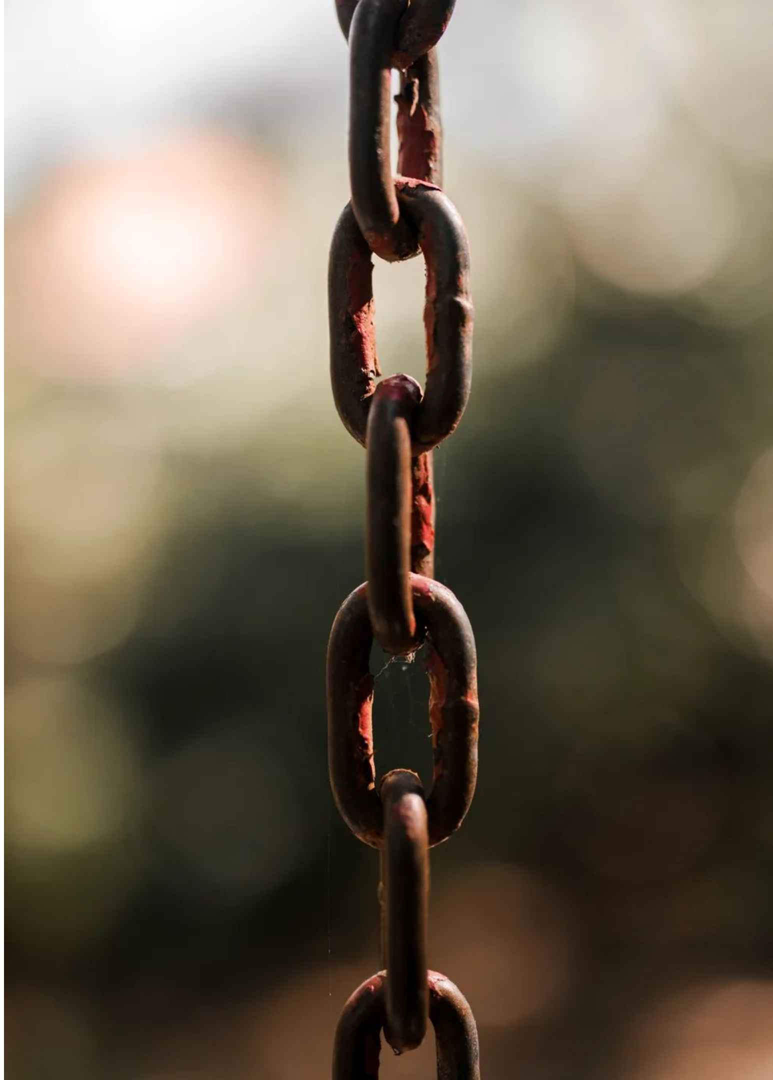
Motivations for playing mobile games have stayed largely the same

However, overall, there has been a slight increase in **playing to connect with friends and family** and to relieve **boredom and stress**.

India, **Russia**, and **Brazil** have seen the biggest shifts towards playing to **connect with friends and family**.

In the **UK**, the biggest shift has been towards **gaming for stress relief**, while in Germany this has actually dipped.

In **India**, **making progress in the game** has also grown as a motivation.



Mobile gamers appear to be more receptive to ‘nudges’

Unsurprisingly, playing while **commuting** and otherwise **out of home**, has **decreased**.

Instead, gamers are now much more likely to play at **ad hoc times during the day** (+8%), **as soon as they wake up** (+7%), and when they **receive notifications** (+5%), suggesting they are more receptive to ‘prods’ at those times.

Playing at **weekday evenings** has also increased significantly in **Brazil** and **the US**, while **Germany** is the market seeing the biggest increase in **weekend sessions**.

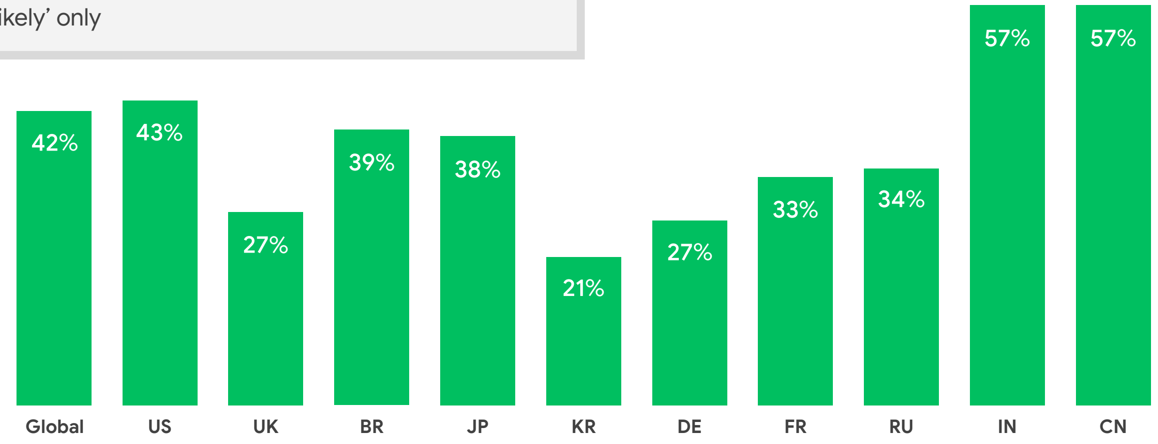
Most markets are also seeing **directional increases** in mobile gaming sessions **before gamers go to sleep.**

Many mobile gamers playing more say they are likely to continue

Globally, **gamers aged 25+** are significantly more likely than younger gamers to say they will play more, and men are significantly more likely than women.

Unsurprisingly, heavy gamers are the most likely to say they will continue to spend more time playing mobile games.

Likelihood to continue spending more time mobile gaming after Covid-19
Showing 'Very / Extremely likely' only



Source: Existing gamers playing more [7611], showing Very / Extremely likely only
Q61. You said you are spending more time playing games on a smartphone than before coronavirus / Covid-19. How likely are you to continue doing this once Covid-19 is over?

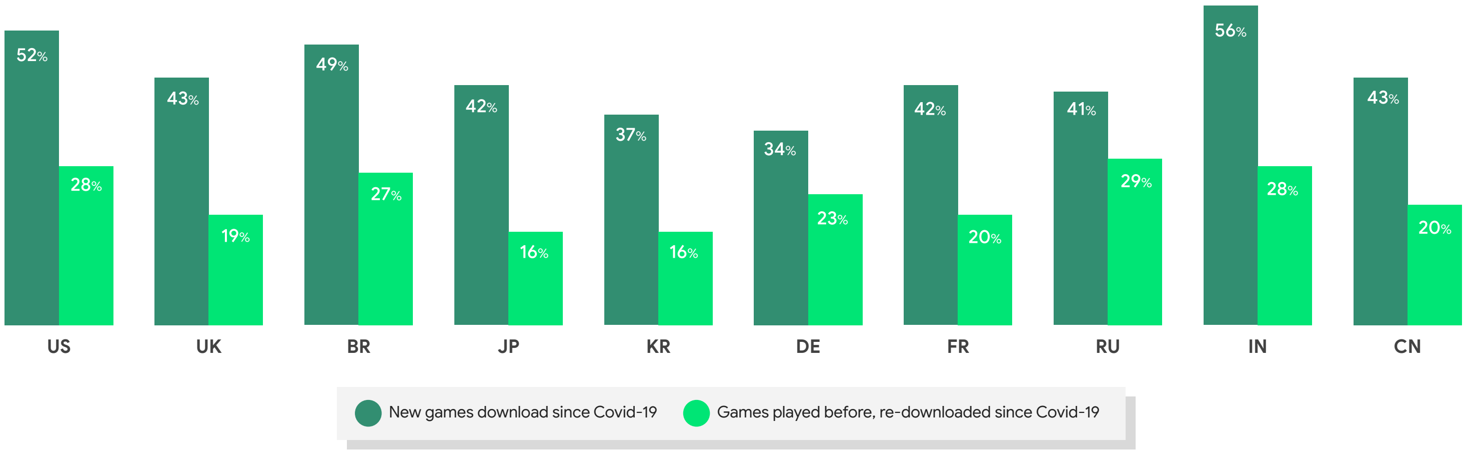
03

Game selection

Many gamers are playing new games downloaded since the start of Covid-19, but quite a few are also re-downloading old games

Gamers in **India, the US** and **Brazil** are most likely to be playing new games downloaded since lockdown.

Globally, **25-34 year olds** are more likely to be buying new games than other age groups. Whilst heavy gamers unsurprisingly are most likely to be downloading new games (52%), globally **37% of light and 46% of medium gamers have also downloaded a new game** since the start of the pandemic.



Base: All respondents [13283] Q24. On a smartphone, are you playing...? Not showing: Current games downloaded before Covid-19

Developers may benefit from promoting older games with a strong nostalgia factor, and advertising content updates

Nostalgia / wanting to revisit an old favourite game is the most common reason globally (49%) for playing re-bought / installed games since lockdown.

Japanese, Korean, Russian and Chinese gamers are the most likely to be driven by nostalgia.

Updates made to the game is the second most common reason (36%), especially for gamers in the **US, Brazil and India.**

Base: All playing re-bought / re-installed games [3017]
Q25. You said you are playing games you previously owned or used to play, and have now re-bought or re-installed, since coronavirus / Covid-19. Why is this?

Since lockdown players prefer games relying on skill, but which are quick to pick up

Since the lockdowns and/or restrictions, nearly half (46%) of mobile gamers say they prefer to play games **that rely on skill** rather than games relying on chance (9%), particularly male and younger players.

Games which are quick to pick up and learn is the second overall preference (40%), rather than games taking a long time to master (15%), especially for women, 35-45 year olds and light gamers.

34% prefer games with shorter playing sessions vs **18%** who prefer games with longer sessions, and despite an uptick in social gaming overall, **32%** prefer games your play on your own vs **30%** who want games to play with others.

Base: Existing gamers [10932] Q29. Since Covid-19, which of the following types of games do you prefer?

There is a difference between what players say they are playing more of vs types of new games downloaded

However, both lists support the range of motivations and preferences expressed.

Overall**,** the top 3 genres being played more than before on mobile are **MOBA, Battle Royale** and **MMORPGs**, which is in line the increase seen in **social play**. Domination by a few core titles also provides fewer opportunities for new downloads in these genres.

There are some market differences, as **FPS** comes top in **Brazil**, and **educational** games in the **US and France**.

However, in terms of **new games**, **action**, **arcade and puzzle** top the list, suggesting the desire for **social features** is at least matched by the desire to **pick up and quickly have skill based fun.**

	Genres they are playing more of (global)	Genres of new games downloaded (global)
1	MOBA	Action
2	Battle Royale	Arcade
3	MMORPG	Puzzle
4	FPS	Board
5	Educational	Simulation
6	Sports	Battle Royale
7	Action	Adventure
8	Racing	RPG
9	Adventure	Sports
10	Music	Strategy

04
Social gaming

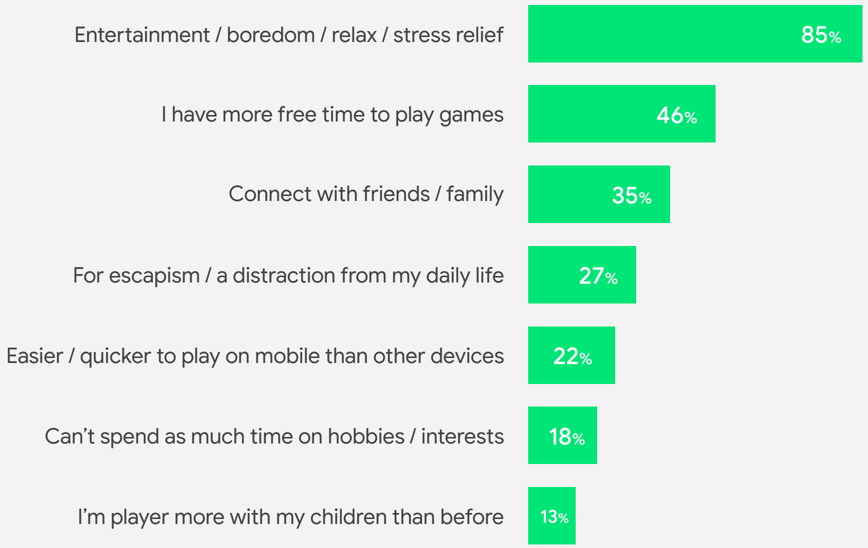
Overall, social is one of the key drivers of playing mobile games more often

Globally, over a third of gamers are playing more in order to **connect with family and friends**.

38% of gamers in the US are playing more for social motivations, followed by **28% in Brazil, 26% in the UK** but just **21% in Korea** and **18% in Japan.**

In line with the desire for entertainment, **just over a quarter** of mobile gamers globally are watching **more esports content,** and over a third say they are watching more gaming content, including strategies, trailers and how to's.

Reasons for spending more time playing games on mobile than before Covid-19

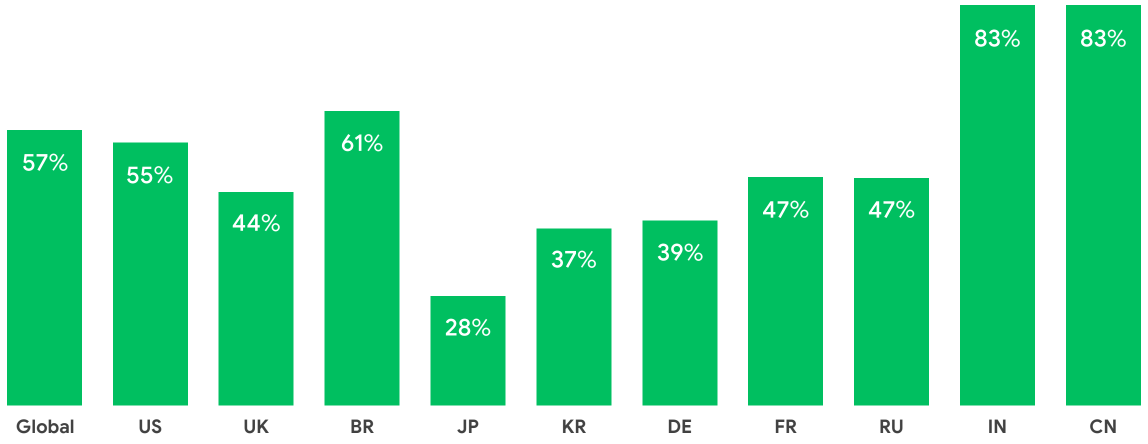


Base: All existing mobile gamers spending more time playing than before Covid-19 [7554]. Global
Q18. You said you are spending more time playing games on a smartphone than before Covid-19. Why is that?

Most are playing more with friends and family than before

This trend has even impacted **light gamers** - globally, **47%** say they are playing more with friends and family, compared to **65% of heavy gamers**.

Multiplayer gaming with friends / family outside and inside household
Showing 'Playing more than before' only



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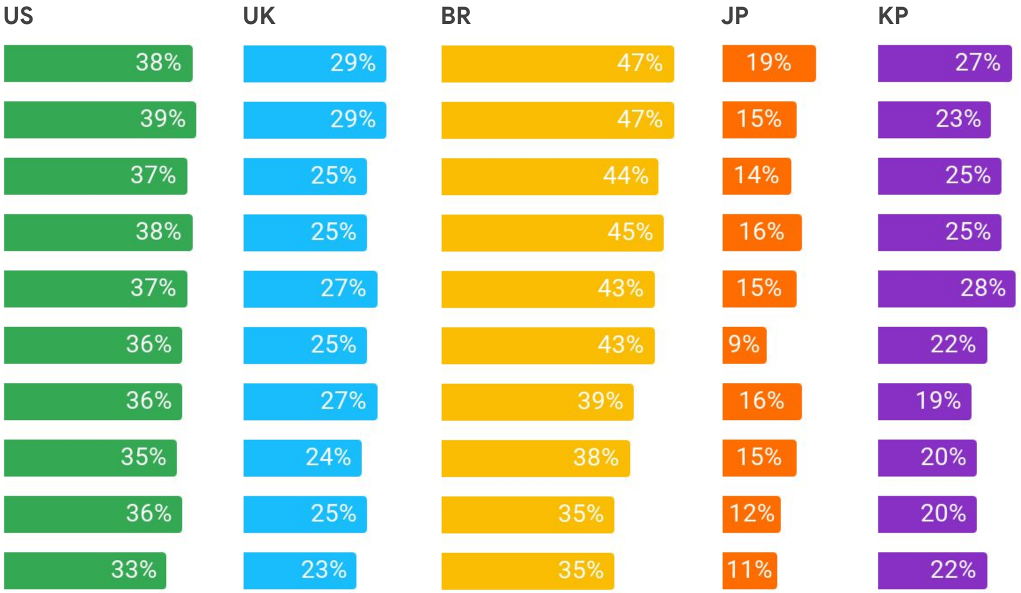
Base: Existing gamers [10932] Showing NET of friends / family outside and inside household (4 different answer options). Global
Q30. Thinking about the smartphone games you are playing most often, which of these best describes your approach to multiplayer gaming?

There has also been a marked increase in other social behaviours across most markets

Top 10 social features and activities

Showing 'More than before' only



	US	UK	BR	JP	KP
Customizing my character	38%	29%	47%	19%	27%
Tracking position against others in leaderboards	39%	29%	47%	15%	23%
Connecting with friends real-time in the game	37%	25%	44%	14%	25%
Connecting with other players real-time in the game	38%	25%	45%	16%	25%
Using social media / integration logins	37%	27%	43%	15%	28%
Sending invitations to friends	36%	25%	43%	9%	22%
Connecting with friends outside game	36%	27%	39%	16%	19%
Discussing level of progress	35%	24%	38%	15%	20%
Connecting with other players outside game	36%	25%	35%	12%	20%
Sharing my scores / achievements	33%	23%	35%	11%	22%

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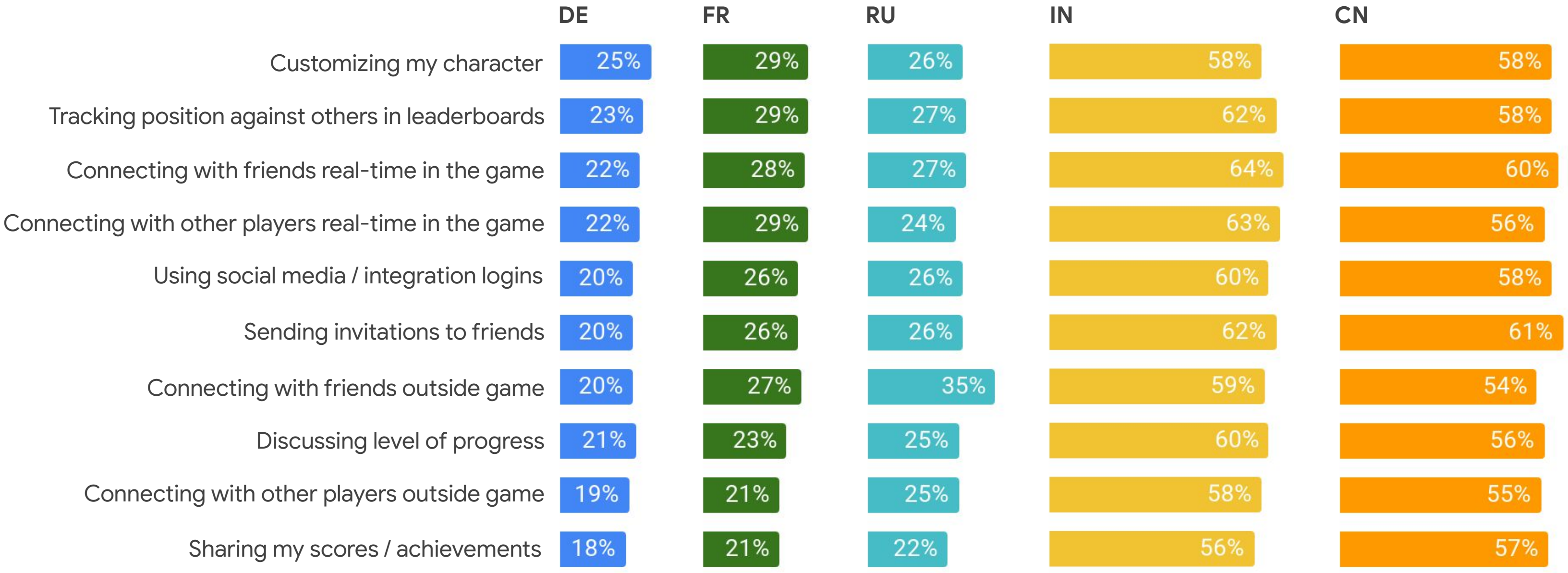
Base: Existing gamers [10932] Q31. Thinking about the smartphone games you are playing most often, which of these best describes your approach to social features / activities? I am...

India and China show the biggest uptick in social behaviours

Top 10 social features and activities

Showing ‘More than before’ only



Base: Existing gamers [10932] Q31. Thinking about the smartphone games you are playing most often, which of these best describes your approach to social features / activities? I am...

05

New mobile gamers

New mobile gamers are already engaging socially and with gaming content

Many new gamers are already engaging with content and gaming with others - **34% globally play with friends and family outside their household**, and nearly **one third** of new gamers have watched game trailer, review or strategy videos.

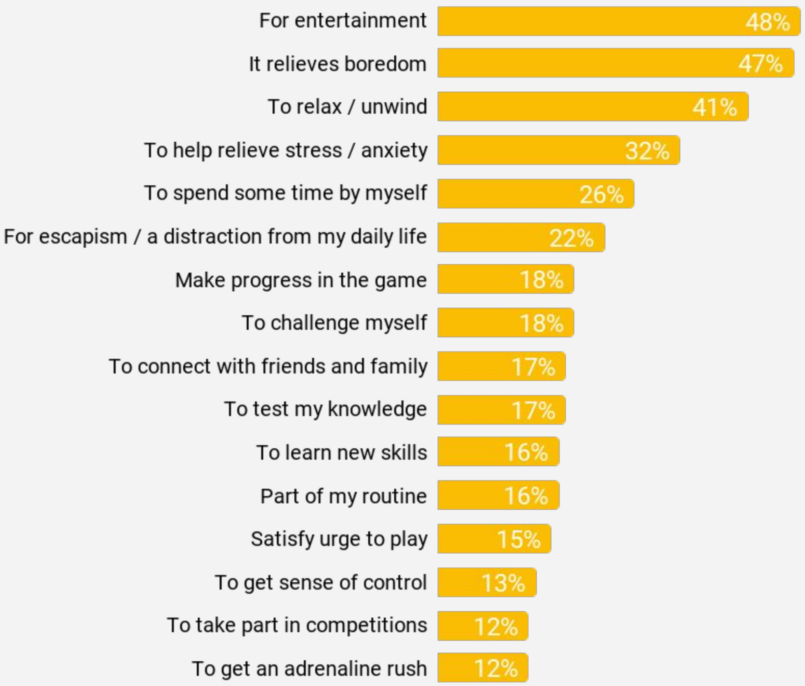
53% of new mobile gamers already played on other gaming platforms, which may help explain this degree of engagement.

New mobile gamers' motivations to play are broadly the same as existing gamers

New mobile gamers are **less motivated by making progress in the game** (18% vs 24%), but aside from that their motivations are very similar to existing gamers.

Wanting to relax and unwind is the main motivation for new gamers in **Brazil**.

New mobile gamers: motivations for mobile gaming



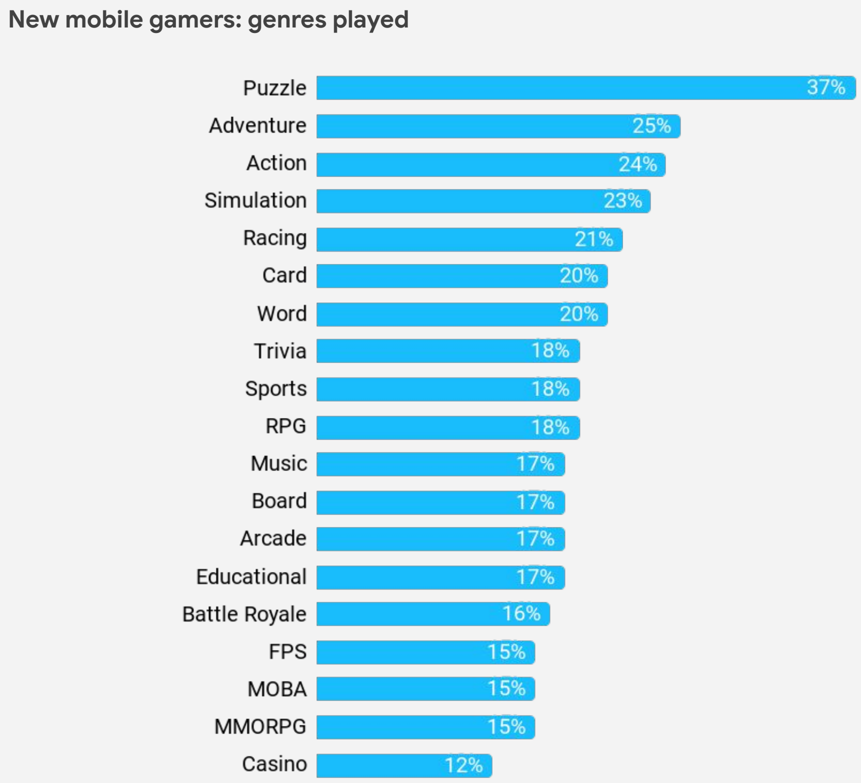
Base: New gamers, global [2351] Q33. Since Covid-19, which of the following are reasons why you are currently playing games on a smartphone?

Overall, puzzle games are the most popular genre for new mobile gamers

New mobile gamers in the UK, India, Japan and US are the most likely to play puzzle games.

There are only three markets where puzzle isn't the most popular genre for new gamers. **In Korea** they are the most likely to play **simulation games**, in **Brazil word games** and in **Germany trivia games**.

Male new gamers are most likely to play action games.



Base: New gamers, global [2351]
Q26. Since Covid-19, are you playing the following game categories or genres on a smartphone?

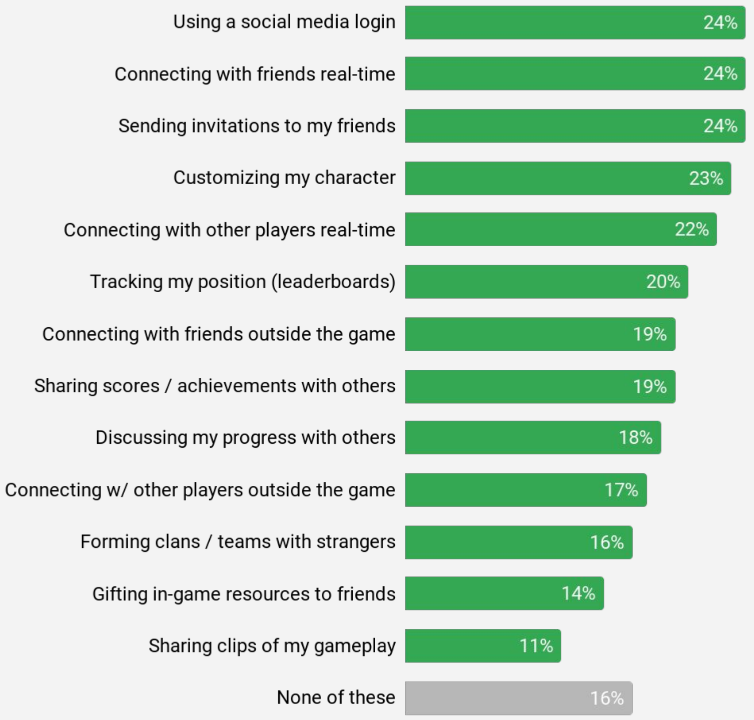
A quarter of new gamers are using social media logins and connecting with or sending invitations to their friends

India and China are the most social markets overall. Of the remainder, **Brazilian new gamers** use social media logins the most.

US new gamers are most likely to connect with friends real-time in the game, while **Korean new gamers** send invitations to friends the most.

Japanese new gamers are the least likely to engage with social features - nearly half use none of these.

New mobile gamers: social features & activities

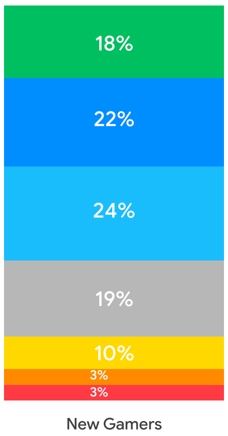


Base: New gamers. Global [2351] Q48. Thinking about the smartphone games you are playing, which of these best describes your approach to social features / activities? I am...

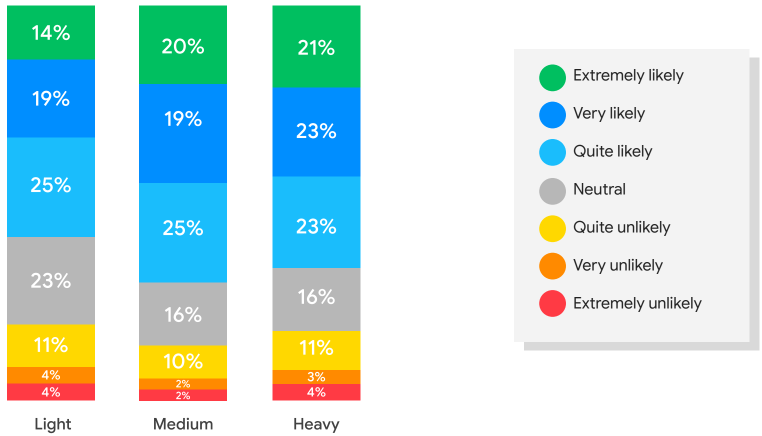
The vast majority of new mobile gamers say they are likely to continue their playing habits

Overall, **40%** say they are very or extremely likely to continue how they currently play games once normal life resumes. **Indian, Chinese and Brazilian new gamers** are most likely to say they will continue, while **Japanese new gamers** are the least likely.

New gamers: Likelihood to continue gaming behaviour after Covid-19



New gamers: Likelihood to continue gaming behaviour after Covid-19 by light, medium and heavy gamers



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Source: New gamers. Global [2351]
Q62. Thinking about the answers you have given throughout this survey, how likely are you to continue the way you currently play games once Coronavirus / Covid-19 is over...?

06
Spend

A third have spent more on mobile games than before

37% of existing mobile gamers have spent more than they typically would before.

Men are more likely to have spent more than women (43% vs 32%).

As expected, **x-platform and heavy gamers** are more likely to have spent more but **a quarter of light gamers** also say they have spent more..

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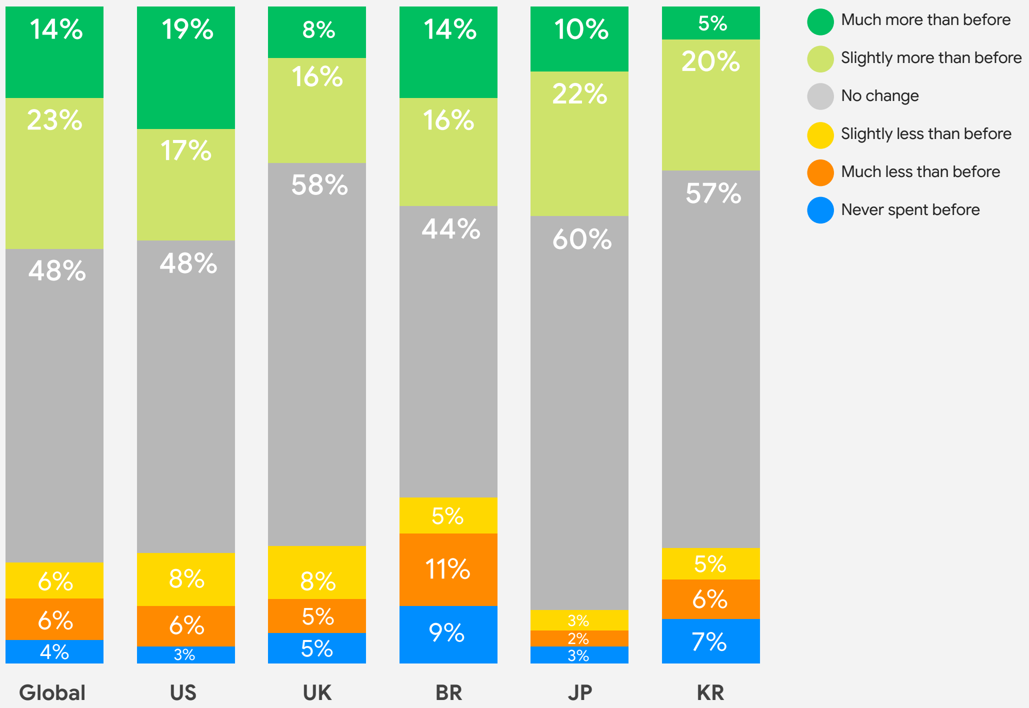
Change in typical spend behaviour on mobile games compared to before Covid-19

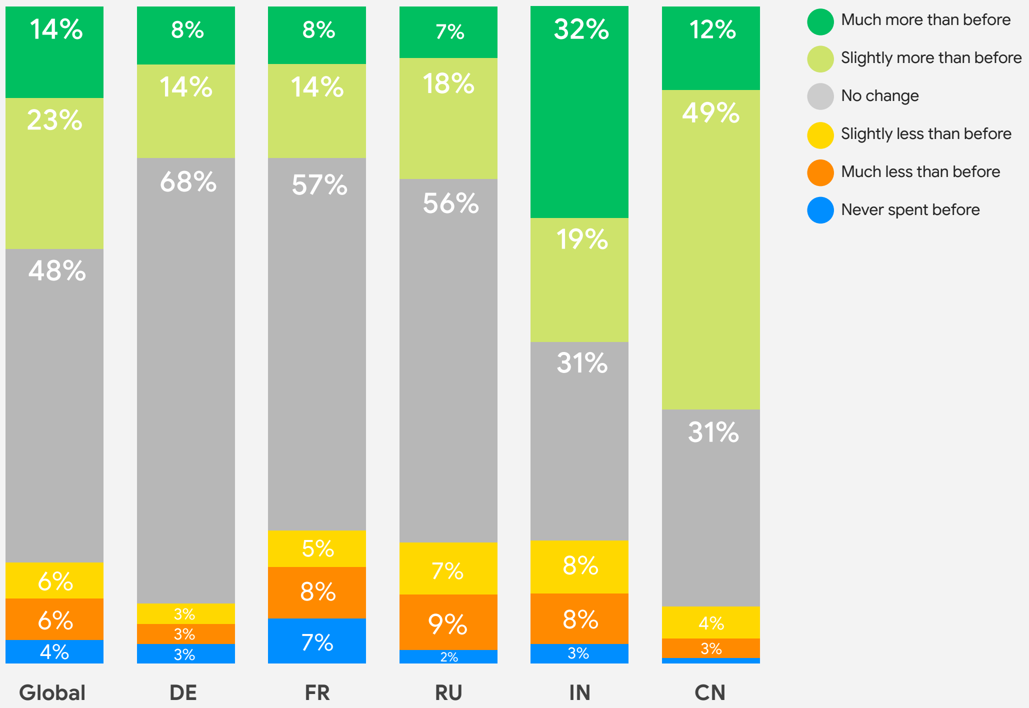


Base: Existing gamers [10579] Q50. Compared to how much you used to typically spend on mobile gaming before Covid-19, is that...

A third have spent more on mobile games than before

Across all markets, **Chinese gamers** are the most likely to have spent more than before lockdown.

Change in typical spend behaviour on mobile games compared to before Covid-19



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Base: Existing gamers [10579] Q50. Compared to how much you used to typically spend on mobile gaming before Covid-19, is that...

Spend appears to be increasing in areas that deepen connections with the game

Virtual currency has seen the biggest increases overall, especially in the UK (+11%), France (+10%), the UK (+7%) and the US (+7%).

Overall, there has been a shift **away from spend that simply allows for longer play** such as speeding up progress or unlocking lives.

Instead, many players prefer to spend to **deepen their experience of the game** - spending more on special items and customization.

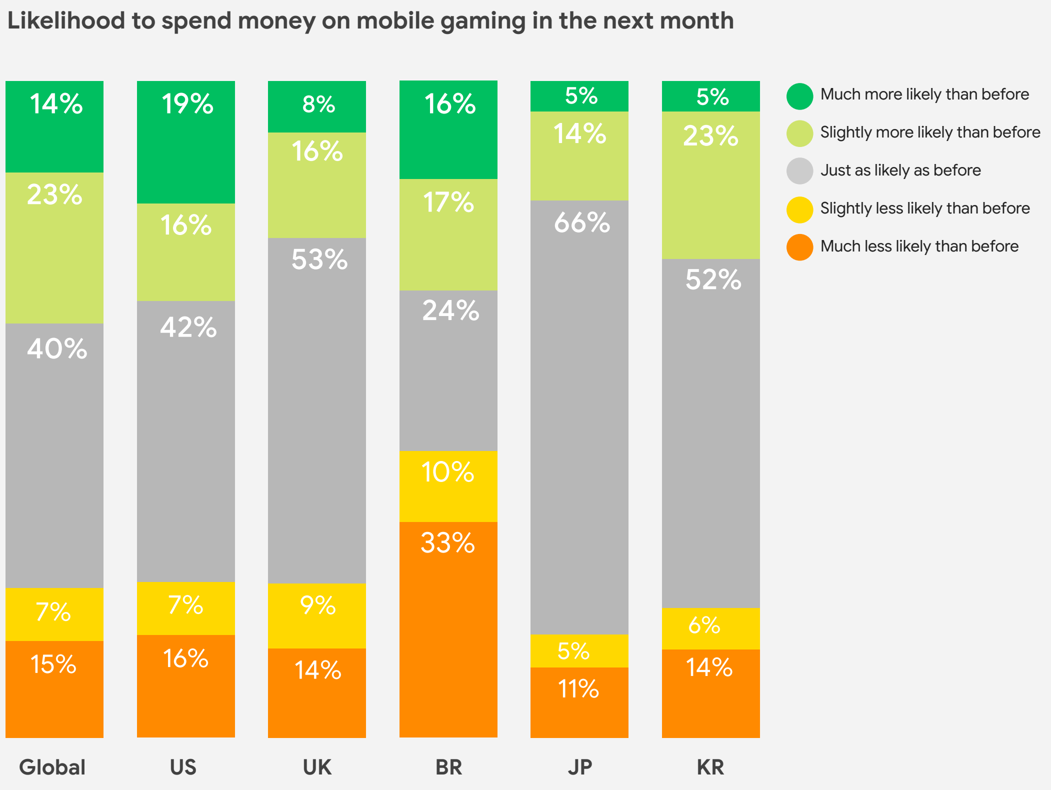
Changing in-game purchase habits (global)

Purchasing virtual currency for in-game transactions	+4%
Buying a special bundle with useful in-game items	+3%
Unlocking special / collectible / rare items or characters	+2%
Customising characters' appearance	+2%
Unlocking new content / characters	+1%
Accessing tournaments / special events	+1%
Giving a gift to a friend	+1%
Speed up progress in the game	0%
Removing adverts	0%
Unlocking extra lives / continuing a level	0%
Powering up characters	-1%

Base: Existing gamers making in-game purchases before Covid-19 and in last month [3733], not showing Other
Q54. You mentioned that during the past month, you have made in-game purchases. What were these for?
Q55. Before Covid-19, what were the typical reasons why you would make in-game purchases?

Over one third say they are more likely than before to keep spending

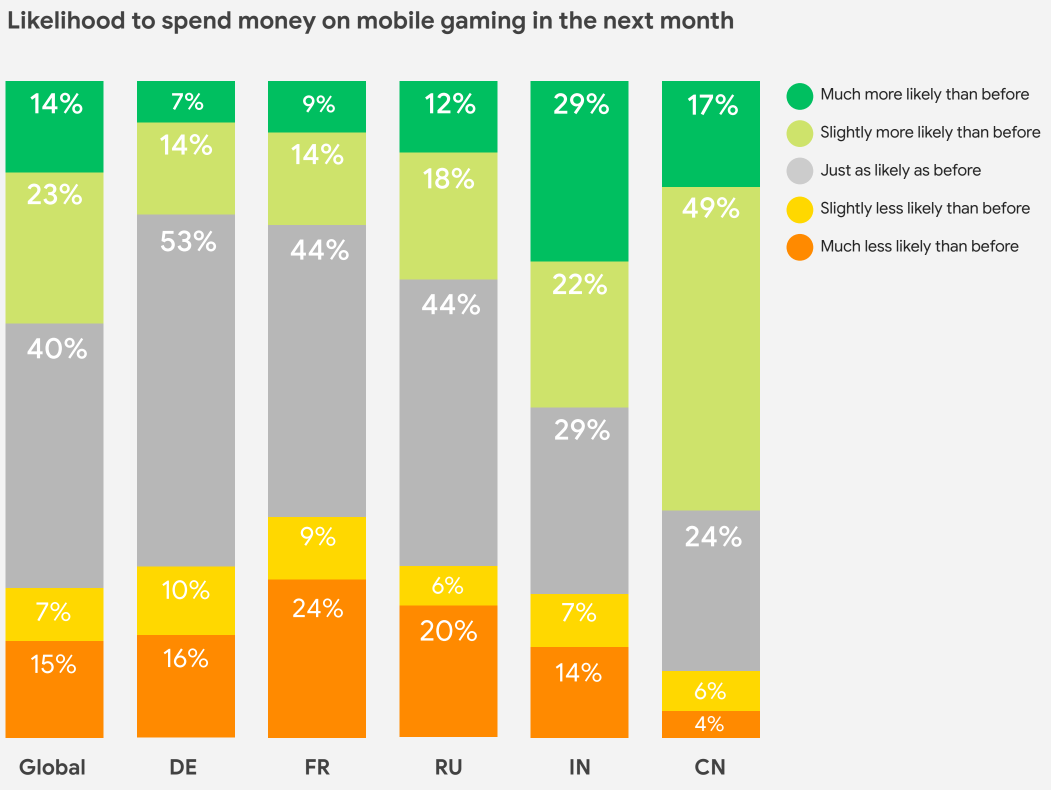
Overall, **37%** of mobile gamers say they are more likely than before to spend in the next month, though this rises to 66% in China and drops to 19% in Japan.



Base: All respondents [13283] Q56. During the next month, how likely / unlikely are you to spend money on smartphone gaming?

One third say they are more likely than before to keep spending

X-platform, heavy, and new mobile gamers are the most likely to say they will spend money on mobile gaming during the next month.



Base: All respondents [13283] Q56. During the next month, how likely / unlikely are you to spend money on smartphone gaming?

07

Appendix

Sample

Total	**13283**	**1128**	**1103**	**1165**	**1095**	**1105**
Light (<3H pw mobile gaming)	4612	440	405	447	444	362
Medium (3-10H pw mobile gaming)	4348	383	383	375	227	339
Heavy (10H+ pw mobile gaming)	4323	305	315	343	424	404
Existing mobile gamers	10932	929	903	964	905	905
New mobile gamers	2351	199	200	201	190	200
Mobile-only gamers	6625	518	510	647	558	542
X-Platform gamers	6658	610	593	518	537	563

Sample

Total	**13283**	**1069**	**1084**	**1101**	**2205**	**2228**
Light (<3H pw mobile gaming)	4612	396	414	375	767	562
Medium (3-10H pw mobile gaming)	4348	381	409	375	764	712
Heavy (10H+ pw mobile gaming)	4323	292	261	351	674	954
Existing mobile gamers	10932	905	905	899	1806	1811
New mobile gamers	2351	164	179	202	399	417
Mobile-only gamers	6625	365	469	397	1227	1392
X-Platform gamers	6658	704	615	704	978	836