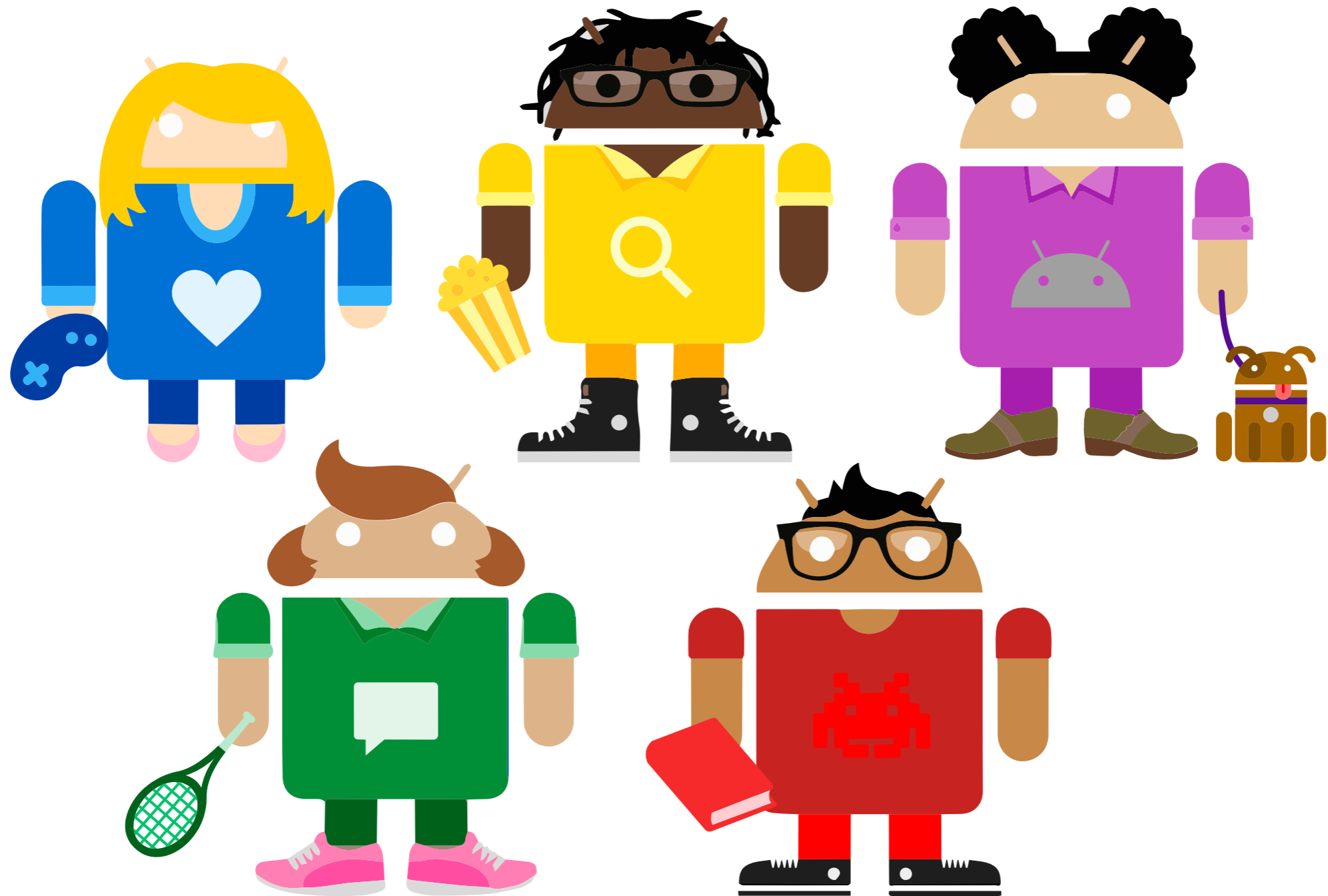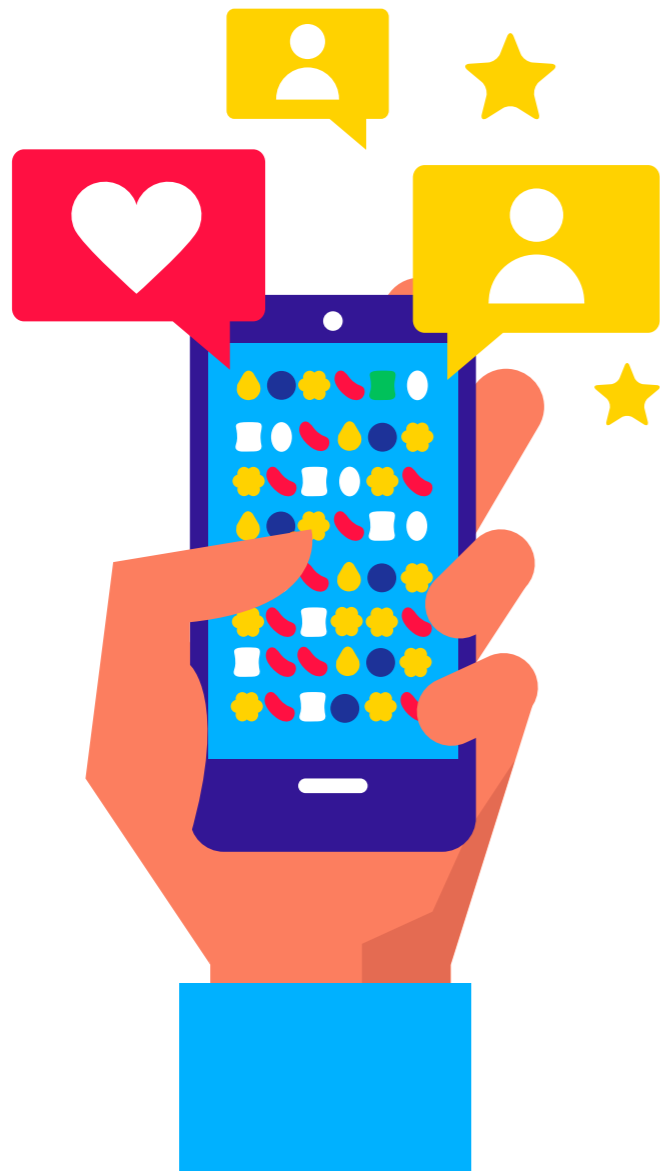# Who plays mobile games?

Player insights to help developers win

Google Play

June 2017

Mobile games are an essential part of the Android user experience. Google Play commissioned a large scale international research study to understand differences and similarities in the needs and behaviors of mobile games players across the world.

Over 22,000 mobile game players in 8 markets (Japan, South Korea, Taiwan, United States, United Kingdom, France, Germany and Russia) responded to our survey about how and why they played mobile games.

# Key Findings

Understanding mobile games players in the context of their needs rather than simple demographics reveal opportunities for games developers.
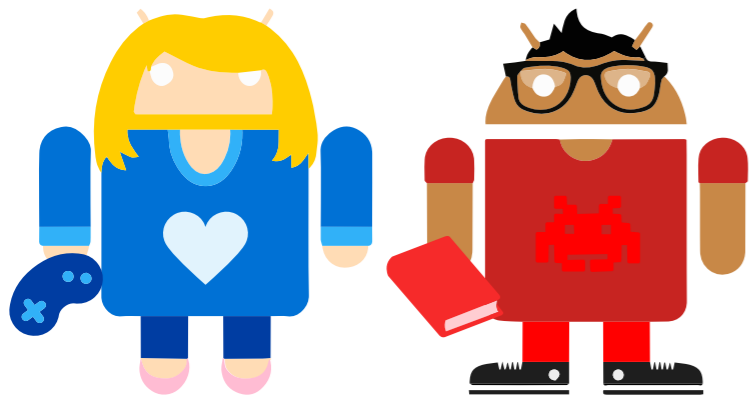


## Game playing is a spectrum

With most players falling between the extremes of 'hardcore' and 'casual'
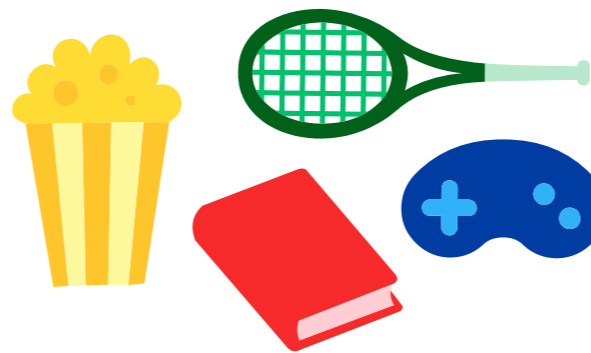


## Demographics don't determine game playing behavior

The role of games in the players' lives and their social behaviors do



## Players vary not only in terms of their needs

But also in terms of the games they play, how they discover them and why they continue to engage with the games they love

# Why segment players?

To understand the similarities and differences in the needs of the diverse groups of people who play mobile games.

# Players are not just 'casual' or 'hardcore'

It can be easy to think of people who play games belonging to one of two extreme groups - the 'hardcore' gamers living and breathing complex highly skilled games, and the 'casual' gamers playing low skill, non challenging games. These extremes are also associated with a range of demographic assumptions and stereotypes. The reality is a majority of players fall somewhere between these two extremes along the game playing spectrum.

**Players**
(population distribution)

More
**"Hardcore"**

More
**"Casual"**
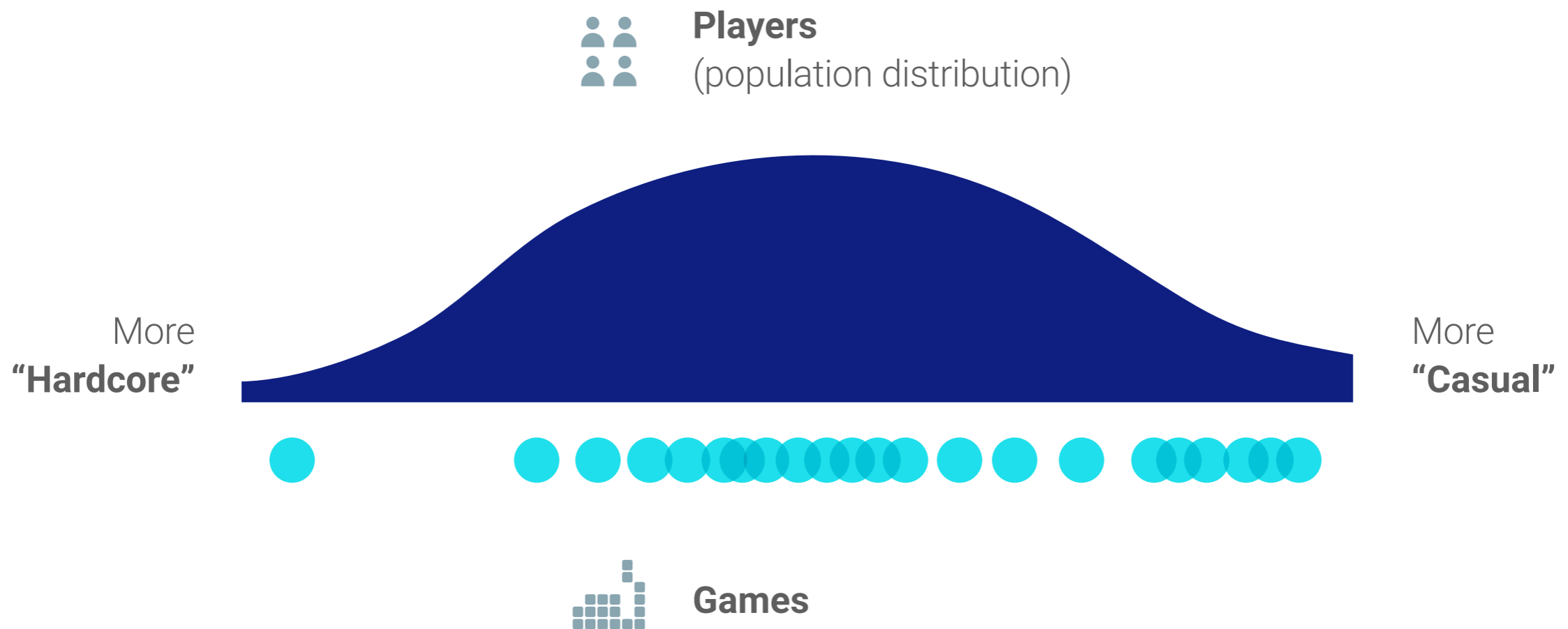
**Games**

Core needs of mobile games players

In the many research studies we ran across the world, we found that key gaming behaviors and attitudes can be framed as an aspect of social behavior and/or passion for gaming.

At first glance, mobile gaming may seem to be a solitary activity, but **social behavior** in mobile games can take many forms, from competing with others to building communities and alliances. Independently of social behavior, **passion for gaming** is way to think about how central games are in your players' daily lives.

# Social and passion for games defined

**Social** = Social influence and social activity

Top 3 statements for those driven by Social behavior
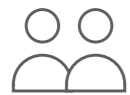
Learn about new games from my friends playing the game

Recommended by friends / family is an important reason to download a game

My friends are playing the game is an important reason to download a game

**Passion** = interest in games & fandom

Top 3 statements for those driven by Passion for gaming

I connect with other players within my mobile game in order to obtain more items / prizes / higher scores

I enjoy collecting items and characters in a smartphone game. / I enjoy collecting virtual items / cards / characters within mobile games

I'm always interested in exploring new mobile games

8

# The mobile game players segments

In our research, we found five segments of mobile game players globally, defined by the relative importance of social aspects of game play, and their level of passion for gaming

**High** Social - **Low** Passion

**High** Social - **High** Passion

Tentative
Followers

Connected
Enthusiasts

Influenced
Players

Playful
Explorers

Passive
Players

**Low** Social - **Low** Passion

**Low** Social - **High** Passion

9
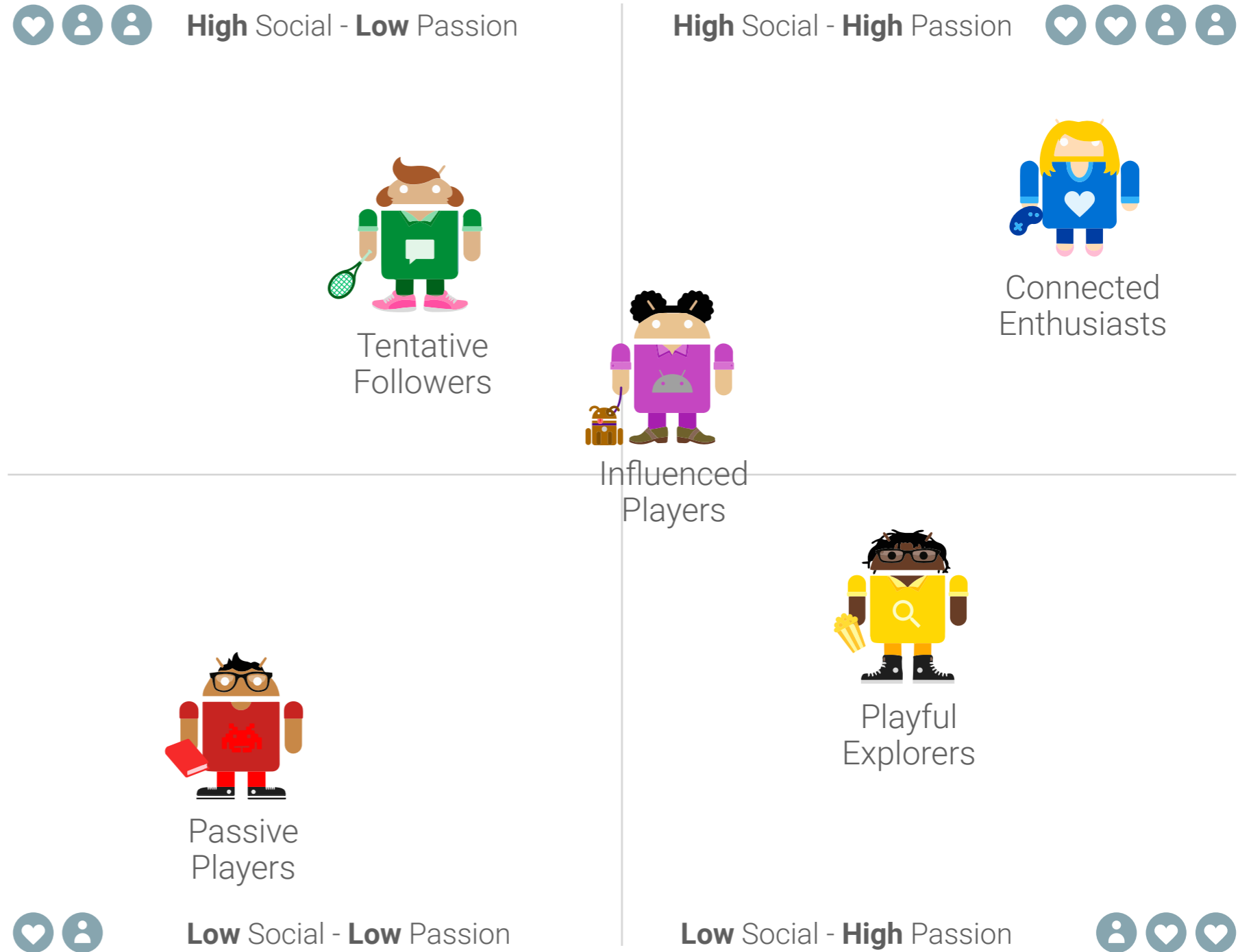
# The drivers of segment differences are not demographics

While there are some demographic differences between these segments in terms of the gender and age of the players in each group, their gaming needs and behaviors are more different - and more meaningful - than any demographic features.

| | Connected Enthusiasts | Playful Explorers | Influenced Players | Tentative Followers | Passive Players |
|---|---|---|---|---|---|
| **% of population** | 16% | 25% | 12% | 21% | 27% |
| **Gender** | M 56% / 44% F | M 55% / 45% F | M 44% / 56% F | M 39% / 61% F | M 43% / 57% F |
| **Age** | 26-45 (13-17 ... 46+) | 26-45 (13-17 ... 46+) | 26-45 (13-17 ... 46+) | 26-45 (13-17 ... 46+) | 26-45 (13-17 ... 46+) |
| **Top social drivers** (over index) | I stopped spending money on one game when I followed my friends when they switched to other games | I connect with other players within my mobile game in order to obtain more items / prizes / higher scores. | Learn about new games from my friends playing the game | Learn about new games from my friends playing the game | I choose only mobile games that are well-ranked |
| **Top passion drivers** (over index) | I love to collect action figures and other merchandise that are related to characters in games. | I love to collect action figures and other merchandise that are related to characters in games. | Made an in-app purchase to add items to a collection | I'd rather spend money on other non-gaming activities than spend a lot on mobile games. | I'd rather spend money on other non-gaming activities than spend a lot on mobile games. |
| **Average years playing** | 4.3 | 4.1 | 3.9 | 3.8 | 3.5 |

Building a player needs based strategy

# We found five segments of game players that vary according to their needs, but what does that mean for developers?

Think of your players in terms of the needs and behaviors that define these segments to inform your strategy for game features, genre fit, user acquisition and engagement.

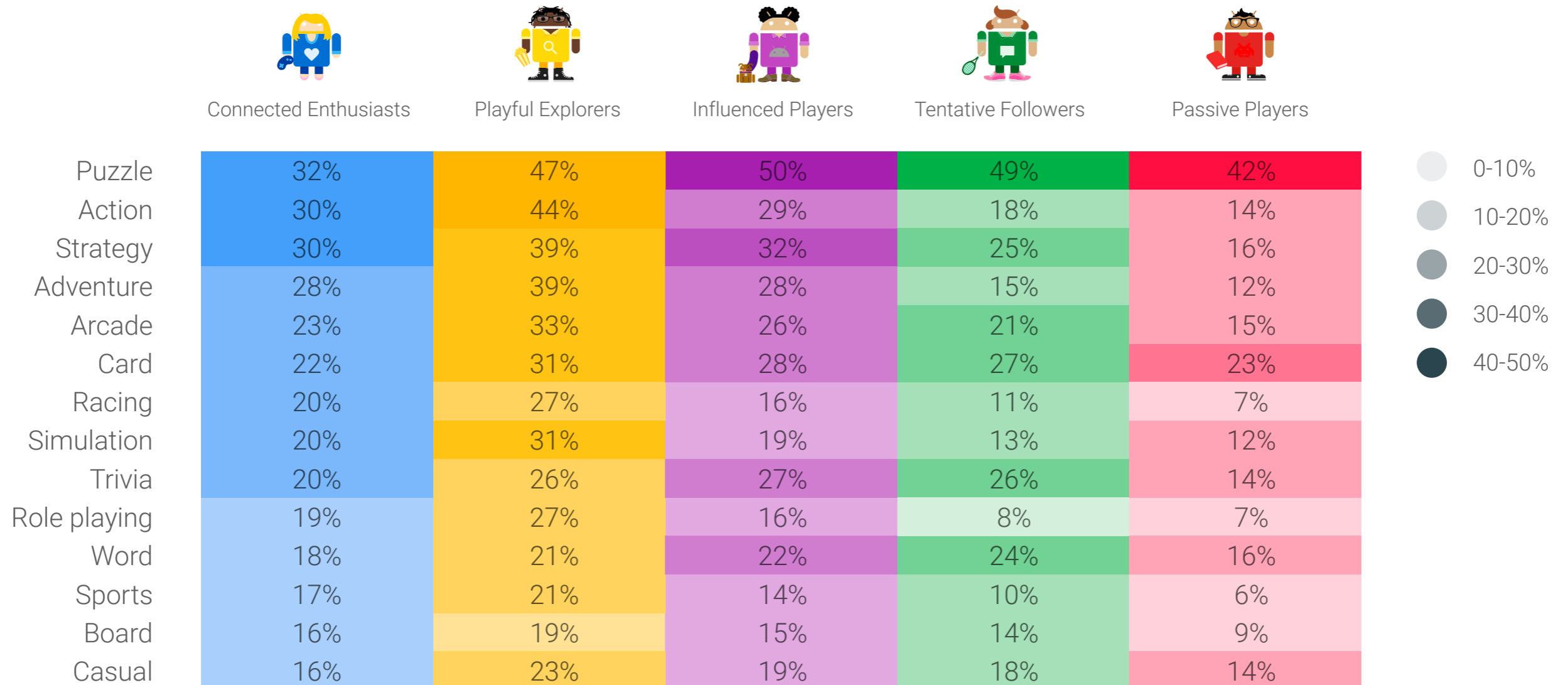Connected
Enthusiasts

Playful
Explorers

Influenced
Players

Tentative
Followers

Passive
Players

# Some genres appear to specific segments, while others have a more general appeal

While puzzle games are universally appealing, we see some specific clusters of game types that appeal to certain segments. 'Playful explorers' skew more towards action and adventure games. 'Influenced players' are big puzzle fans, but also enjoy adventure, strategy & trivia. 'Tentative followers' enjoy card, trivia and word games, while 'passive players' are all about puzzles and card games.

| | Connected Enthusiasts | Playful Explorers | Influenced Players | Tentative Followers | Passive Players |
|---|---|---|---|---|---|
| Puzzle | 32% | 47% | 50% | 49% | 42% |
| Action | 30% | 44% | 29% | 18% | 14% |
| Strategy | 30% | 39% | 32% | 25% | 16% |
| Adventure | 28% | 39% | 28% | 15% | 12% |
| Arcade | 23% | 33% | 26% | 21% | 15% |
| Card | 22% | 31% | 28% | 27% | 23% |
| Racing | 20% | 27% | 16% | 11% | 7% |
| Simulation | 20% | 31% | 19% | 13% | 12% |
| Trivia | 20% | 26% | 27% | 26% | 14% |
| Role playing | 19% | 27% | 16% | 8% | 7% |
| Word | 18% | 21% | 22% | 24% | 16% |
| Sports | 17% | 21% | 14% | 10% | 6% |
| Board | 16% | 19% | 15% | 14% | 9% |
| Casual | 16% | 23% | 19% | 18% | 14% |

Legend:
- 0-10%
- 10-20%
- 20-30%
- 30-40%
- 40-50%

# Different segments of users are more likely to use different channels for discovery

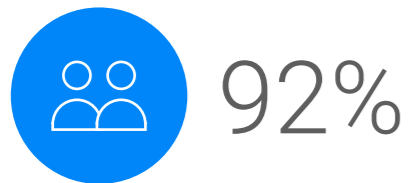**Google Play**

| Connected Enthusiasts | Playful Explorers | Influenced Players | Tentative Followers | Passive Players |
|---|---|---|---|---|

**92%**
My friends are playing the game

**36%**
Top charts in app stores

**65%**
My friends are playing the game

**81%**
My friends are playing the game

**28%**
Advertising in other games or apps I use

**56%**
Seeing someone else play the game

**35%**
Advertising in other games or apps I use

**41%**
Seeing someone else play the game

**50%**
Seeing someone else play the game

**28%**
Top charts in app stores

**45%**
Advertising in other games or apps I use
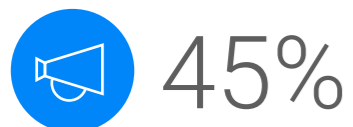
**34%**
YouTube (gaming videos)

**35%**
Advertising in other games or apps I use

**27%**
Top charts in app stores

**20%**
Ratings of game in app stores

# Motivators of engagement go beyond just relaxation and boredom

Relaxation and boredom relief are universal motivators to keep people playing games. However, we see some other drivers of engagement that vary across segments.

## Connected Enthusiasts

are all about making progress, testing their skills (both personally & with others) and rewarding themselves with the pleasure of game play
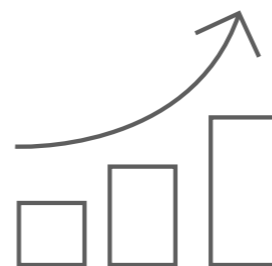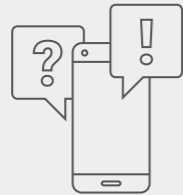
## Playful Explorers & Influenced Players

also see playing games & making progress as a reward, but are less focussed on testing skills compared to others

## Tentative Followers and Passive Players

are less likely to focus on the pleasure of game playing. They see game playing as a way to relieve boredom and relax

# Checklist for Developers

**1**

Consider the various gaming needs of your players. Unless your game is highly targeted towards a specific demographic group, don't fall for demographic stereotypes. Instead, think about the different gaming needs being met by your game and the key experiences your game provides.

**2**
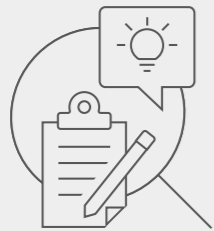
Take player differences into account when designing your game or adding new features:
- Be specific: Is this feature for a certain segment of players, or all players in general?
- Be informed: Get feedback from the right segments of players.
- Be concrete: Articulate how a feature will change specific aspects of these players' experience, and why that is important to them.

**3**

Tailor your customer acquisition strategy. Use the best acquisition channels to reach each desired player segment. Players of all kinds discover new games in many ways, but if you're building a game for a specific kind of player, you should optimize your strategy to emphasize the channels they engage with most.

**4**

Tailor engagement strategies to motivate your target player segment(s). 'Connected enthusiasts' love leaderboards and challenging their community while 'playful explorers' are more interested in personal progress. Use the game content that is the most meaningful to your players to help them love playing your game.

For more information on growing your games business with Google Play, visit the [Android Developers Website](#).