

Mobile Application Gaming - UK - February 2012

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“The creation of a uniform android skin will no doubt contribute to a greater trust amongst consumers in the viability of games available for the platform. However, it is unlikely to lead to a paid download rate comparable with Apple's iOS ecosystem, as different hardware settings and capabilities amongst different Android smartphones or tablets provide problems in standardising player experiences.”

-- Samuel Gee, Technology Analyst

In this report we answer the key questions:

- How can developers overcome discoverability issues for casual games?
- Can the lack of pre-release regulation on the Android Market be resisted?
- Does the introduction of a default Android skin resolve the fragmentation problem?
- Is there scope for partnerships with traditional publishers?
- Can smartphones compete with a growing tablet market?

Definition

‘Mobile non-dedicated devices’ in this report refers to smartphones, tablets and portable media players which are based on an advanced operating system capable of downloading and running third-party applications. Examples of these devices include the Apple iPhone, or any phone running the Windows Phone 7 operating system, or the Google Android operating system (such as the Galaxy S2). Throughout the report, following the industry terminology, games which can be downloaded onto these devices will be referred to as ‘casual games’.

Market analysis in this report is mostly based on games designed for the iOS and Android mobile operating systems, downloaded through the Apple App Store and the Google Android Market. As the Apple App Store is the better established and (as of the time of writing) most used method of obtaining applications, data charting app usage, free or paid downloads and predicted trends based on past activity are often based on Apple App Store metrics. However, where the conclusions drawn from these data are unlikely to also apply to the Android Market (or any other application store), this is clearly stated along with separate analysis defining the issue.

Charts showing application store data are for the UK, unless otherwise specified.

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