

## Mobile Gaming - China - October 2018

Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“More and more gamers are playing on mobile devices while the average playing time has increased slightly compared to last year. Consumers have more motivations to make in-game purchases than before and they tend to try variety of games. Therefore, increasing players’ retention rate and motivations for in-game purchases are vital to a game’s success.”

**- Terence Zhou, Research Analyst**

This report looks at the following areas:

- How to improve mobile gamers’ retention?
- How to grow big in niche markets?
- How to make in-game ads appealing to mobile gamers?

The market for mobile games accounts for 57% of the total gaming market and is expected to reach RMB 264,550 million in 2023. As mobile technology surges ahead like never before and consumers become more accepting of in-game purchase, the mobile gaming market has great potential in China.

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://store.mintel.com)

**CALL:**  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

**EMAIL:**  
[reports@mintel.com](mailto:reports@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Mobile Gaming - China - October 2018

Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Overview

What you need to know

Covered in this Report

Excluded

### Executive Summary

The market

Figure 1: Market share of gaming market, by gaming devices, China, 2011-18 (est)

Figure 2: Market value of mobile gaming market, China, 2011-18 (est)

Figure 3: Best- and worst-case forecast of market value of mobile gaming market, China, 2013-23

Companies and brands

Figure 4: Market share of top mobile gaming companies, China, 2017

The consumer

More gaming players on mobiles

Figure 5: Gaming devices used in the last three months, by game type, July 2018

Slight increase of gaming hours

Figure 6: Time spent on playing mobile games per day, July 2018

18-19s most explorative with game types

Figure 7: Average numbers of mobile game types played, by gender and age, July 2018

One in five haven't spent a penny yet

Figure 8: Claim rates on 'I haven't spent money on mobile games in the last 3 months', by age, July 2018

Figure 9: Segmentations of mobile game players, July 2018

What we think

### Issues and Insights

How to improve mobile gamers' retention?

The facts

The implications

How to grow big in niche markets?

The facts

The implications

How to make in-game ads appealing to mobile gamers?

The facts

The implications

### The Market – What You Need to Know

A new era of mobile gaming

Mobile penetration and connectivity

Consumers' attitudes are changing

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Mobile Gaming - China - October 2018

Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Market Size and Forecast

Representing 57% of the total gaming market

Figure 10: Market share of gaming market, by gaming devices, China, 2011-18 (est)

Figure 11: Market value of mobile gaming market, China, 2011-18 (est)

Forecasted to hit RMB 264,550 million in 2023

Figure 12: Best- and worst-case forecast of market value of mobile gaming, China, 2013-23

## Market Drivers

Fast-growing mobile phone penetration

The promised world of 5G connectivity

The development of mobile phone hardware/chips

Seeking relaxation and socialisation from mobile games

Increasing willingness to pay for video games

Widely accepted mobile payment

## Key Players – What You Need to Know

Tencent and NetEase are squeezing the market

M&A and promotion

Innovation in game type, advertisement and devices

## Market Share

Top mobile game developers in terms revenue

Figure 13: Leading companies in mobile gaming market, by value share, China, 2017

The competition between Tencent and NetEase

## Competitive Strategies

Publishers moving into development and channels

Advertisements for mobile games on the rise

Figure 14: Gaming 'propaganda'

Fighting on the live streaming platforms

## Who's Innovating?

Asymmetric multiplayer mobile games

Figure 15: Identity V

Rewards now, watch later

Figure 16: Rodeo Stampede

Playing on the cloud

Figure 17: GeForce Now

## The Consumer – What You Need to Know

Mobile phone is the dominant gaming device

Dedicated gamers' personas are diverse

Four types of mobile game players

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Mobile Gaming - China - October 2018

Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### Gaming Devices

Larger gap between the usage of mobile phones and PCs

Figure 18: Gaming devices used in the last three months, by game type, July 2018

Mobiles are attracting more consumers in tier one cities

Figure 19: Gaming devices used for online gaming in the last three months in tier 1 cities, July 2018 vs September 2017

Males remain more passionate about mobile online gaming

Figure 20: Gap between mobile online and mobile single game playing (as benchmark), by gender and age, July 2018

Tablet users are sophisticated online gamers

Figure 21: Gaming devices used in the last three months, by select device users, July 2018

### Mobile Gaming Hours

2.8 hours daily

Figure 22: Time spent on playing mobile games per day, July 2018

25-29s lag 18-19s in gaming hours

Figure 23: Mobile gaming hours, by gender and age, July 2018

Players with high household incomes also tend to play longer

Figure 24: Mobile gaming hours, by monthly household income, July 2018

Console players are the most dedicated gamers

Figure 25: Mobile gaming hours, by gaming devices, July 2018

### Mobile Game Types Played

Preference for high diversity of game types

Figure 26: Types of mobile game played, July 2018

18-19-year-olds most explorative with game types

Figure 27: Average numbers of mobile game types played, by gender and age, July 2018

Females are also fans of popular game types

Figure 28: Types of mobile game played, by gender, July 2018

Figure 29: Penetration of select mobile game type, by gender and age, July 2018

Sandbox and Puzzle games are at the two ends of the timing ladder

Figure 30: Time spent on playing mobile games per day, by mobile game types, July 2018

### In-Game Purchase Motivations

One in five haven't spent a penny yet

Figure 31: Claim rates on 'I haven't spent money on mobile games in the last 3 months', by age, July 2018

Spending is about gaming experience itself

Figure 32: In-game purchase motivations, July 2018

30-39-year-old gamers' alternative motivation

Figure 33: Claim rates on selected in-game purchase motivations, by gender and age, July 2018

Enlarge the user base of arcade games and raise purchasing motivation of puzzle games' players

Figure 34: In-game purchase motivations of Puzzle and Arcade players, July 2018

### Preferred Mobile Game Styles

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Mobile Gaming - China - October 2018

Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### High earners want mobile games that require dedication

Figure 35: Game style preference, by demographic group, July 2018

### Multiple player mode drives up gaming length

Figure 36: Mobile gaming hours, by gaming style preference, July 2018

### More console gamers in lower tier cities

Figure 37: Gaming preference, by city tier, July 2018

### Fast-paced game preferers are more likely to play on mobile phones

Figure 38: Gaming device preference, by game pace preference, July 2018

### Males are more likely to play multiple games at the same time

Figure 39: Multi-gaming preference, by demographic group, July 2018

## Consumer Segmentation

### Four types of mobile game players

Figure 40: Segmentations of mobile game players, July 2018

### Mainstream Players (主流玩家): Experienced, disciplined and outgoing

Figure 41: Gaming expertise, % of strongly agree, by consumer segment, July 2018

### RMB Players (氪金玩家): Undisciplined spenders

Figure 42: In-app purchase attitude, % of strongly agree, by consumer segment, July 2018

### Casual Players (休闲玩家): Learning while relaxing

Figure 43: Perceived gaming benefits, % of strongly agree, by consumer segment, July 2018

### Social Players (社交玩家): Gamers with a clear purpose

Figure 44: Social attitudes, % of strongly agree, by consumer segment, July 2018

## Meet the Mintropolitans

### Mintropolitans are mobile gaming enthusiasts

Figure 45: Consumer segmentation, by consumer classification, July 2018

### More games and more time

Figure 46: Consumer segmentation, by consumer classification, July 2018

## Appendix – Market Size and Forecast

Figure 47: Market value of mobile gaming, China, 2013-23

## Appendix – Methodology and Abbreviations

Methodology

Fan chart forecast

Abbreviations

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)