

Mobile Gaming - US - 2021

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This report looks at the following areas:

- How mobile gaming brands can respond to ever-increasing competition and app monetization challenges
- The risks of app sprawl, privacy battles and misleading mobile ads
- How mobile game brands can effectively expand their target audience, without alienating their core players
- Momentum for cloud gaming and subscription gaming services as well as how mobile game franchises can benefit

While 44% of mobile gamers purchased a game or spent money on features/items within a game over a three-month period, only a small fraction (16%) of those who made a purchase estimated they spent \$30 or more. As more mobile games enter the market and look to drive revenue through purchases, they'll be competing for attention from a small fraction of the market. When looking at user retention, it becomes even more clear that many developers and advertisers will need to rethink their approach to promoting and creating games – the seven-day median user retention rate for mobile games at the end of 2020 was just under 7%.

Another challenge mobile gaming faces comes as the US recovers from COVID-19 and businesses reopen. Consumers are eager to get out of their homes, which may result in a decline of mobile gaming as people start seeking all the activities that they weren't able to do regularly over the pandemic. 44% of mobile gamers agree that mobile gaming will be less important to them as more activities outside their home open up.

It will become increasingly difficult for any individual mobile game to stand out as more brands expand into mobile gaming. This is no longer a segment filled with only simple or casual games, but one that caters to a wide variety of gamers. Brands should take this opportunity to creatively explore how they can engage new audiences or create twists on common game genres that keep experienced gamers invested.



"This is the time for mobile gaming brands to take calculated, creative risks. New and established gaming brands alike are entering the mobile space, and they're bringing their resources and creativity with them."

– Fiona O'Donnell – Senior Director, Mintel Reports

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Mobile gaming is still early in its lifecycle as an entertainment medium, but this is a critical transition moment for the sector. Mobile devices have become capable of running more sophisticated games and cloud gaming promises to make multiplatform gaming even easier than it already is. Mobile brands will have opportunities to establish robust legacies that rival PC and console games, but they will need to be willing to take creative risks, create unique mechanics and push the envelope on what can be done in a smartphone or tablet game.



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