

Gaming: Mobile - Canada - 2021

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This report looks at the following areas:

- Mobile gaming behaviours, including smartphones vs tablets and a comparison to PCs/consoles.
- An analysis of where and why consumers play mobile games.
- The types of games played and the role of betting in mobile gaming.
- The types of ads consumers see in games and their experience with clicking through.
- How the mobile gaming category is affecting smartphone, tablet and mobile network demand.

Surprisingly, mobile gaming is often not mobile. Even prior to the pandemic, there were more consumers playing a mobile game in front of their TVs than on their commutes, at work or at school. Mobile gaming's ability to be played on the go has helped it have broad appeal – but that mobility does not define the category.

In fact, at-home mobile gaming helped this category succeed during the COVID-19 pandemic; more than half of gamers said they were playing more as a result of the pandemic and lockdowns. As Canada opens back up, the mobility of these games will help keep the category flexible and able to adapt to consumers spending less time at home.

The biggest challenge for mobile gaming is the disconnect between how many consumers use it and how many are willing to pay. Fewer than half spend money on these games and most of those who do spend small amounts. The result is that much of the category's success is dependent on the few consumers who do pay and advertising partners.

Perhaps the most exciting opportunity for this category is not the games themselves – but its increasingly important role in the overall tech industry. A significant proportion of consumers factor mobile gaming into their mobile device and smartphone plan purchase decisions – and it will be a catalyst for



“Mobile gaming may not be the quintessential video game experience in the same way that Nintendo or PlayStation are – but it represents a billion-dollar category that is used by half of the adult population in Canada. And that broad appeal makes it a particularly useful tool for advertisers to leverage, too.”

– **Scott Stewart, Senior Tech & Media Research Analyst**

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many consumers to upgrade to 5G by making that network's benefits tangible. As simple as mobile games may seem, they have increasingly become a central cog in the consumer electronics industry.

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