Google for Games

Ipsos

2022 Global Mobile Gamers' Key Behavior Shifts

1

Laser-focused on spending smartly

Inflation concerns are driving more focus on managing finances.

Gamers are triggered to spend by great value in-game promotions and high-quality content, which can deepen long-term gamer value.

Top In-Game Spend Triggers

29% Pay-to-purchase items were great value

29% Special promotions attracted me

27% To unlock new playable content

> "I wouldn't spend more on gaming packages with money now because I have two kids and COVID really messed with our money situation."
>
> — Female, USA, Tycoon Experienced Gamer

2

Demand for seamless cross-device gaming experiences

7-in-10 mobile gamers play on more than one device.

Games that originate from different platforms greatly appeal as they embrace cross-platform features, but enhanced expectations of graphics, audio, a clearer screen and control mechanisms are demanded.

71%

of cross-device gamers will download or purchase a PC or console game of the current mobile game they are playing

> "I feel like mobile games have come a long way with graphics, but not with music and sound effects. I feel like they should do better in that regard."
>
> — Male, USA, 4X SLG Experienced Gamer

3

Reconnected with others via mobile gaming

Social interaction is an increasing demand with gamers.

Building connections with others in game becomes even stronger. In the early stages of a game release, establishing WOM and social interaction can enhance the connection among gamers.

Top Growing Mobile Gaming Triggers

1. Have common topics to talk about
2. Recommended by the influencer I follow
3. Feel excitement

> "I've made some online friends through playing games, but mostly it's by sending in-game gifts to people I went to high school with but haven't spoken to since then."
>
> — Female, USA, Merge New Gamer

Source: Google / Ipsos, 2022 The Shifting Needs of Global Mobile Gamers. USA / Japan / Germany / South Korea / Brazil / Indonesia, April 2022

Google and Ipsos listened to 6,000 mobile gamers from USA, Japan, South Korea, Germany, Brazil, and Indonesia to understand the shifting dynamics of life and gaming which have created the desire of a new gaming experience that game developers need to respond to.