

The background of the entire image is a photograph of three people, two women and one man, who are smiling and looking at their mobile devices. The image is dimmed to allow the text to stand out. The woman on the left is holding a small white dog. The woman in the center is wearing a colorful patterned shirt. The man on the right is wearing a grey blazer and glasses.

MODERN MOBILE GAMER

PERSONAS 2019

Presented by: *Tapjoy*[®]

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There's no debating it: mobile gaming has become universal.

Consumers from every walk of life play mobile games: young and old, male and female, urban and rural. They play mobile games several times a day, for many hours a week. Mobile games have in fact become so ingrained into their daily lives that a majority of them -- 69% -- said they would rather give up social media or television than mobile gaming.

As gaming becomes an even greater force in mainstream global culture, individuals that once distanced themselves from the label of "gamer" now wear it proudly. Almost 60% of respondents in this year's report openly identified as gamers. This points to dwindling stigmas, and represents a 26% increase from the results of our first report conducted two years ago.

Mobile gamers represent diverse audience groups, with this year's report suggesting that many are well educated, affluent, and exploring new and exciting parts of commercial life. This, above all else, should be a wake

up call for advertisers looking to reach just about any demographic.

The rise of mobile gaming among U.S. audiences has created a wealth of opportunities for brands and advertisers. Consumers surveyed said they're more likely to pay attention to advertisements in mobile games than those on TV, the Internet, or other mediums. People playing mobile games understand the role ads play in allowing games to be free, many (72%) saying they actually prefer interacting with ads in exchange for in-app currency or premium content.

With 18,442 responses included in this 2019 report, we've taken a closer look at 3 core audience groups: maturing millennials, busy parents, and thriving professionals. In the pages that follow, we're proud to offer a collection of valuable insights into each of their unique demographics and behavioral trends.

These are the Modern Mobile Gamers, and they can't wait to meet you.

MEET THE MODERN MOBILE GAMER

For its third annual Modern Mobile Gamer market intelligence report, Tapjoy surveyed more than 18,000 consumers over the course of three days to learn who they are, what they use their phones for, and how mobile gaming fits into their lives.

Methodology

Tapjoy surveyed 18,442 respondents via in-app offerwall in a variety of mobile games. Responses were collected from March 27th to 29th, 2019. All respondents were over the age of 18 and reside within the continental United States.

Research revealed a variety of consistent trends across all survey respondents, including:

69% would rather give up social networks or television than mobile games

Most work in the Healthcare, Education, or Food & Beverage industries

They vastly (72%) prefer rewarded advertising to interstitial ads

75% live in communities with high population density

They are predominantly female

Gaming is second only to texting in terms of mobile usage

They are largely college educated

Their favorite game genres are Puzzle, Strategy, and Role Playing Games

60% of respondents now consider themselves "gamers," 26% more than did two years ago

MEET THE MODERN MOBILE GAMER

In addition to these high-level insights, our analysts took a deep dive into three major market segments that emerged from the study's findings. They were selected and studied in greater detail due to their above-average value to advertisers. The three segments identified are:

MILLENNIAL MOBILE GAMERS

MOBILE GAMER PARENTS

HIGH INCOME MOBILE GAMERS



What follows is an in-depth exploration of each segment's unique demographic and behavioral mobile trends.



Sasha is a 28 year old nurse from Chicago, IL. She lives downtown with her partner, with whom she'll soon be starting a family. They've both made major steps in their careers and spend their hard-won disposable income on vacations, dinners at funky restaurants, or shopping online for clothing and beauty products. She and her partner are currently renting but have started casually browsing the classifieds for their first real family home.

Just last week, Sasha enjoyed a much deserved adventure on an exotic vacation to Thailand that she bought through an app she saw advertised on her phone. She disabled notifications on Facebook, Twitter, and Gmail so that she could fully unplug, and explore the sites. When back at her hotel, she would unwind and play a game on her phone before resting up for the next day of her trip.

Once back in the States, she flips between texting her closest friends photos of her trip and adjusting back to her normal routine. To kill time on her bus ride to work she powers through levels in Design Home. After watching a rewarded video ad in exchange for virtual currency, she makes note of a cool new movie coming to theaters this weekend. Sasha and her partner make plans to decompress after their vacation with a movie date and catch some downtime before their next work week.

Most Likely to Engage With:

- Entertainment & Movie Promotions
- eCommerce Apps
- Meal Delivery Apps
- Travel Apps



CHICAGO, IL

DEMOGRAPHICS

MILLENNIAL MOBILE GAMERS



Primarily **educated females** living in **densely populated areas** throughout the US who **do not have children**.



Many have taken steps in **starting their careers** and the majority are in **serious committed relationships**.



More than half have entered an earning bracket that allows for **some disposable income**.

Household



62% female, **38%** male



75% urban/suburban
25% rural

Family

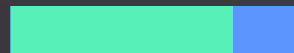


52% are married or in a serious relationship



54% do not have children

Professional



77% have post secondary education



66% are employed either part-time or full-time



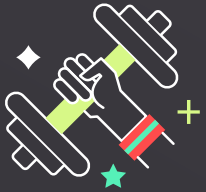
54% earn more than \$50K per year

Careers

- 1.** Healthcare/Medical/Pharm
- 2.** Education
- 3.** Food/Beverage Services
- 4.** Retail & Trade
- 5.** Engineering
- 6.** Manufacturing
- 7.** Finance/Insurance

GAME & APP USAGE

MILLENNIAL MOBILE GAMERS



Prefer the most
mentally challenging
game categories.



Play **multiple times per day** throughout the week.



Would rather give
up social networks
than games.

Attitudes Toward Advertising



76% prefer opt-in
rewarded ads over
interstitial ads



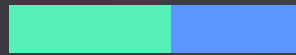
Only **10%** avoid
engaging with
rewarded in-app ads

Attitudes Towards Gaming

88% have been playing mobile games
for 2+ years



67% said they would rather give up
social media or TV than mobile games



68% prefer to play games while relaxing
at home, away from distractions



Top 5 Mobile Activities

#1 - Texting

#2 - **Gaming**

#3 - Photo & Video

#4 - Social Networking

#5 - Music & Podcasts

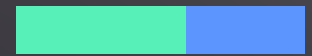
Top Game Genres

- Puzzle
- Strategy
- Word

Majority pay more
attention to ads in
mobile games versus
any other medium

Gaming Frequency

59% play mobile games
4+ times per day



87% play 2+ mobile
games per week



47% play 7+ hours
per week



PARENT MOBILE GAMERS



Ava is a 43 year old high school principal from Houston, Texas.

For the past five years, she's lived in a suburban bungalow with her husband and two daughters. Both Ava and her husband have good incomes thanks to their established careers, which helps cover the costs of their eldest's passion for basketball and youngest's goal to learn guitar. Their remaining disposable income goes toward home entertainment streaming packages and a weekly night out for dinner and a movie.

Between managing work and raising two kids, Ava has far less free time than she once did. After she drops her kids off at their after school activities, she takes an hour to herself for a yoga or zumba class at her local gym. In between pickups and drop offs she finds time for a few rounds of Wordscapes on her phone, usually a couple times per day. Once the kids are in bed, she looks forward to playing a few levels while her husband catches up on TV. She finds puzzle games relaxing, they're one of her favorite ways to wind down.

When she's not working, Ava is often snapping pictures of her kids or planning movie nights with her friends. While she's still a regular Amazon shopper, lately she's been buying books or games the family can enjoy instead. If they can save up enough money, the family is hoping to visit Disney World next summer -- unless she folds and agrees to lease that new car for her daughter.

Most Likely to Engage With:

- eCommerce Apps
- Real Estate Apps
- Entertainment & Movie Promotions
- Puzzle Games



HOUSTON, TX

DEMOGRAPHICS

PARENT MOBILE GAMERS



Primarily **educated females** living in **suburban areas** with **two or more children**.



Most have **established careers** and are **married or in committed relationships**.



More than half are in an earning bracket that allows for **disposable income**.

Household



65% female, **35%** male

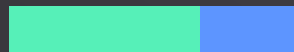


74% urban/suburban
26% rural

Family



17% are single



66% are either married or in a serious relationship



54% have two or more children

Professional



73% have post secondary education



62% are employed either part time or full-time

Careers

1. Healthcare/Medical/Pharm
2. Education
3. Food/Beverage Services
4. Retail & Trade
5. Government
6. Finance/Insurance
7. Arts/Entertainment

GAME & APP USAGE

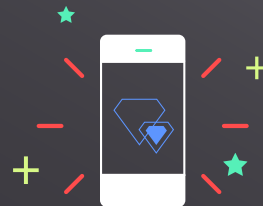
PARENT MOBILE GAMERS



Only market segment where **photo & video** app usage **surpasses gaming**



Often play **multiple short gaming sessions** per day



Frequently engage with ads, & prefer ads that impact gameplay

Attitudes Toward Advertising



Only **13%** avoid engaging with rewarded in-app ads



67% would likely engage with a video ad in exchange for a reward



93% prefer to view ads as part of gameplay

Top Game Genres

- Puzzle
- Strategy
- Word

Top 5 Mobile Activities

- #1** - Texting
- #2** - Photo & Video
- #3** - **Gaming**
- #4** - Social Networking
- #5** - Shopping

Attitudes Towards Gaming



100% said they play mobile games while at home relaxing, watching TV or before bed



84% have been playing mobile games 2+ years



55% spend more time playing games on their phones than using social networks

Gaming Frequency

87% play mobile games 2+ times per day



84% play 2+ different games per week





Foster is a 37 year old financial analyst living in New York with his wife and newborn son. After finally paying off their student loans, the couple decided to purchase a new Long Island property. While the mortgage payments are higher than Foster's old East Village rent, the family earns enough to make regular trips to the city for brunch with friends or to catch some live music on a night out.

Foster's success leaves him with free time mostly in the late evenings or on the weekends. He has a decent one hour commute to and from work each day, which he spends playing whichever mobile game he's in the mood for. He has his favorite 3 games, but often checks the top charts to download and try something new. While he could afford a high-end console or gaming PC, he prefers the flexibility and ease of playing on his phone.

Beyond gaming, Foster uses his mobile phone across all areas of his life. He relies on apps to track his fitness and finances, and he is in constant communication with his colleagues and clients around the world. He enjoys high-end fashion and his guilty pleasure is online retail - even more so now that he is shopping for his son too. In a year, once the family has adjusted to their new living arrangements, Foster plans to take that European vacation he's always dreamed of.

Most Likely to Engage With:

- Financial Apps
- eCommerce Apps
- Travel Apps
- Entertainment & Movie Promotions



NEW YORK, NY

DEMOGRAPHICS

HIGH INCOME MOBILE GAMERS



Represent an **equal split**
between males &
females



Most are in a **serious**
committed relationship &
have **one or more children.**



Vast majority are **highly**
educated & hold senior
positions in their careers.

Family



57% are married or
in a serious relationship



60% have one or
more children

Household



50% male, **50%** female



43% are 39 or older,
57% are younger than 39



77% urban/suburban,
23% rural

Professional



85% have post
secondary education



6% are
self-employed



62% earn more than
\$75K per year

Careers

1. Healthcare/Medical/Pharm
2. Education
3. Finance/Insurance
4. Government
5. IT/Data Services
6. Computer Hardware/Software
7. Engineering

GAME & APP USAGE

HIGH INCOME MOBILE GAMERS



Majority play **2 or more different games** each week.



Prefer opt-in rewarded ads & understand that advertisements support game developers.



Many are also **console gamers** & engage with a variety of franchises across platforms.

Attitudes Toward Advertising



40% understood that rewarded ads support game developers



74% prefer opt-in rewarded ads



Only **6%** said it's unlikely they would engage with a rewarded video ad

Top Game Genres

- Puzzle
- Strategy
- Word

Top 5 Mobile Activities

- #1** - Texting
- #2** - **Gaming**
- #3** - Photos & Video
- #4** - Social Networking
- #5** - Shopping

Attitudes Towards Gaming



88% have been playing mobile games for 2+ years



55% spend more time playing games on their phones than using social networks

Gaming Frequency

87% play mobile games 2+ times per day



85% play 2+ different games per week



56% also game on consoles





Mobile gaming is universal -- but not all mobile gamers are alike. They come from a wide range of interests, educational backgrounds, marital statuses, and careers. What they all have in common, however, is the time they spend playing mobile games -- often on a daily basis.

More than any other medium, mobile gamers are attentive and receptive to the messages made available through opt-in rewarded ad placements that are already driving growth for the world's most successful brands and app developers.

Few markets have the monetization potential of mobile games, or such a diverse range of audiences. Which is why having a mobile games advertising strategy is crucial for any forward-thinking industry leader.

The opportunity is here. Are you ready for it?

*Want to connect with
mobile advertising experts
at Tapjoy?*

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