
Sept. 2014

IAB Mobile Gamers

Who They Are, How They Shop, and How to Reach Them

Methodology

IAB conducted a custom analysis of syndicated Prosper Insight data to look at consumer and media behaviors of 'Mobile Gamers', or those who use mobile gaming apps, as compared to the general US Adult 18 and older population. Since the data supports the finding that Mobile Gamers rely heavily on their smartphones, the report further examines the behaviors and economic outlook of mobile phone owners who use their smartphone for all of its functions as compared to the general US Adult 18 and over population.

The report is derived from the Media Behaviors & Influence™ (MBI) Study (Jan 2014) of 15,410 respondents surveyed online and the Monthly Mobile Consumer Survey (July 2014) of 6178 respondents surveyed online. The study has a margin of error of less than 1%, at a 99% confidence level. Two percentage points is statistically significant at 99% confidence level.

Sample Sizes

- **Prosper Insights & Analytics Media Behaviors & Influence Annual Survey**
 - **15,410 Adults 18+** representative of the general US population
 - **5727 Mobile Gamers, Adults 18+** who download mobile apps and who use mobile gaming apps
- **Prosper Insights & Analytics Monthly Mobile Consumer Survey**
 - **6178 Adults 18+** representative of the general US population
 - **1278 Heavy Smartphone Users, Adults 18+** who answer 'I use my smartphone for all of the functions – it's my life'

About ProsperInsight™

ProsperInsight delivers customized timely market intelligence from various sources through its cloud-based technology-driven Integrated Solutions Platform. Solutions are delivered on multiple devices (PC/Tablet/Smartphone) though the InsightCenter™ tool using diverse information sources relevant to clients' business needs. www.GoProsper.com.

Mobile Gamers: Who They Are, How They Shop, and How to Reach Them

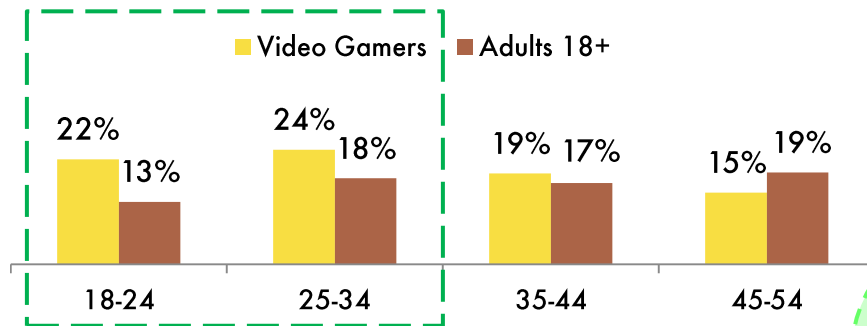
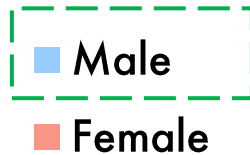
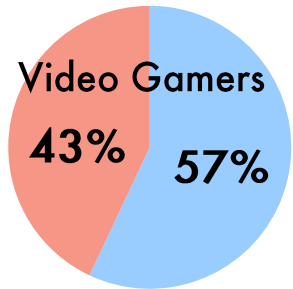
- **Mobile Gaming is mainstream:** Gaming Apps are the #1 mobile app used. Two-thirds of those who download apps use gaming apps (37% of the US adult population), representing casual gamers on the go. The typical Mobile Gamer is a young, female professional with above average income and plans to spend it.
- While Male Mobile Gamers are likely to be heavier gamers, Female Mobile Gamers are mainstream casual gamers. **This younger, mobile, affluent audience is also reachable outside the game.**
- **Mobile Gamers are planning major purchases** and here's how to reach them:
- **Mobile Gamers are heavy digital and mobile users**, making online the best place to reach them.
- **Mobile Gamers are more likely to own a smartphone than a desktop** and regularly use their smartphones almost as much as they use their computers. Smartphones have become their 'go to' device while computers remain 'on standby.'
- Being digitally savvy and mobile focused, **they regularly research products online** and use their smartphones before buying. They're also much more likely than the general US adult population to make purchases using their mobile devices.
- Mobile Gamers are **more prone to being persuaded in their purchases by digital advertising**. Thus, ads served to them while researching products (online or in the store on their phones) will likely be rewarded. **Internet ads and Email ads have more influence on them than Cable TV** and nearly as much influence as Broadcast TV.

Mobile Gamers are Planning Major Purchases and Here's How to Reach Them:

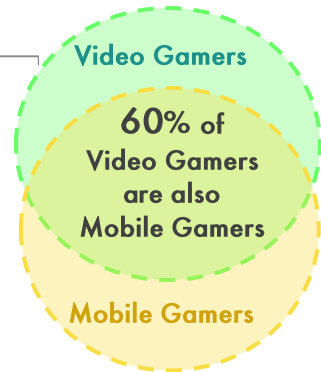
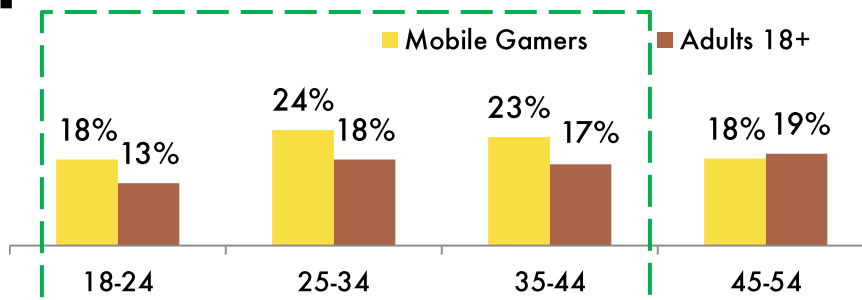
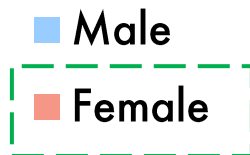
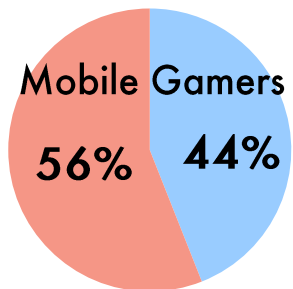
- Conveniently, **Electronics and Clothing are the top products for which Mobile Gamers do both online research and are influenced by online advertising**, presenting an ideal environment to serve such ads.
- **Mobile Gamers are also more likely than the general public to both check email on their smartphones and to be influenced by email ads.**
- **Mobile, Social, Video and In-Game advertising also have greater influence on Mobile Gamers than on US adults over 18.**
- **Mobile Gamers 'showroom' regularly, but most often end up buying the product in person at the store or at a competitor's store. Their next most popular 'showrooming' activity is to leave the store and buy online, offering a second chance for advertisers to reach them through digital media.**
- **Since they're reachable on the go via mobile while in the stores, targeted ads, offers or email coupons during their shopping experience would likely sway their purchases.**
- **In addition, Mobile Gamers are influencers themselves, being more likely than the average American to give advice to friends and colleagues on products and services in person or online.**
- **Thus, ads served to Mobile Gamers are likely to have an amplification effect via digital sharing and social channels.**
- **In summary, Mobile Gamers are planning to spend and they shop armed with a smartphone. As casual gamers, they are reachable outside of the video game and as heavy mobile users, they are always connected. Digital and Mobile ads are likely to influence their purchases so intercepting their online research with ads and offers is likely to pay off.**

Gamers vs. Mobile Gamers

- **44% of the US adult (18+) population plays video games during a typical week:**



- **37% of the US adult (18+) population uses mobile gaming apps:**



IAB Mobile Gamers: Who They Are, How They Shop, and How to Reach Them, Sept. 2014
IAB Analysis of ProsperInsight Data, N = 15,410 A18+, N = 5,727 Mobile Gamers

Gaming is the #1 Type of Mobile App Used

- Two-thirds of those who download apps use mobile gaming apps, representing 37% of the US population
- These Mobile Gamers are the focus of this report

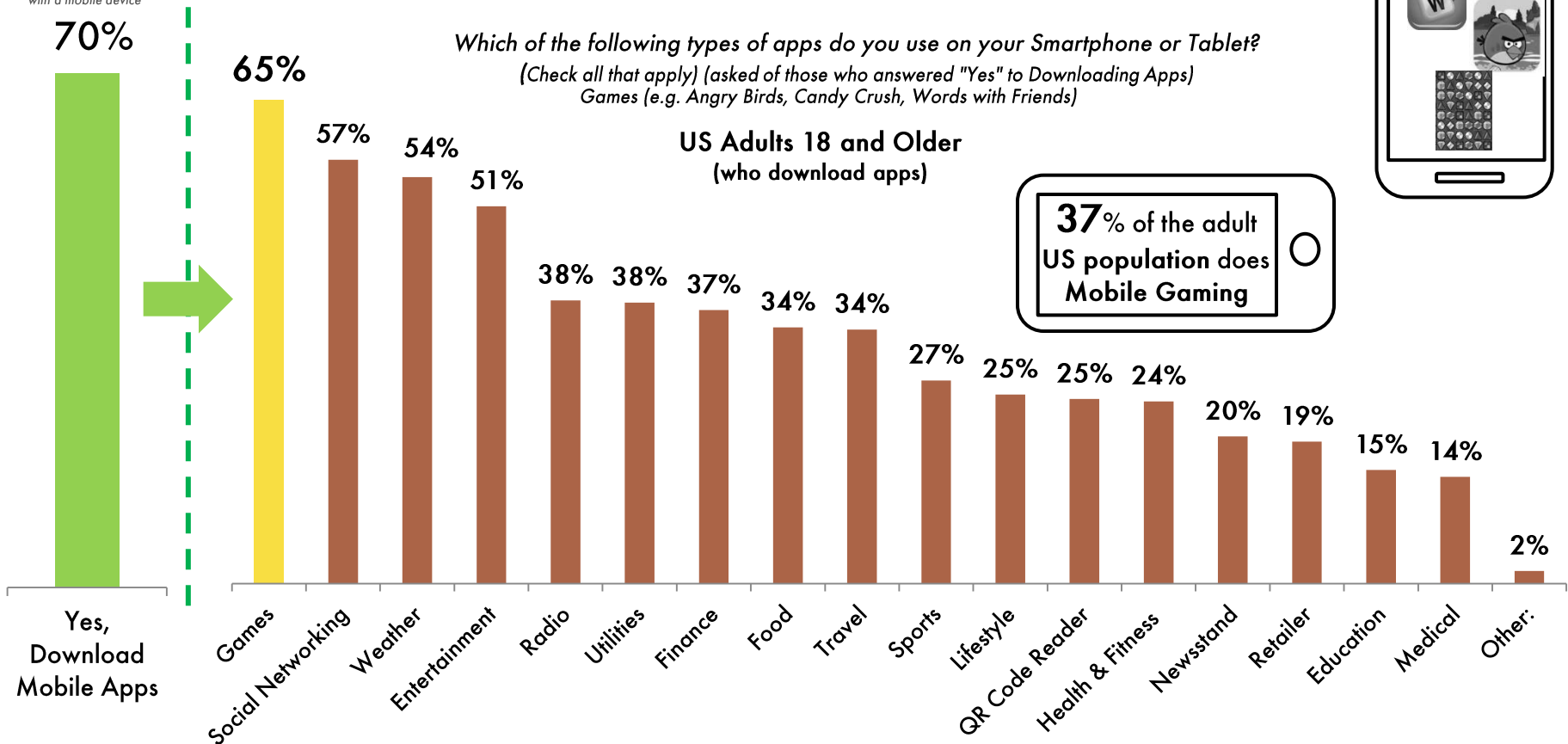
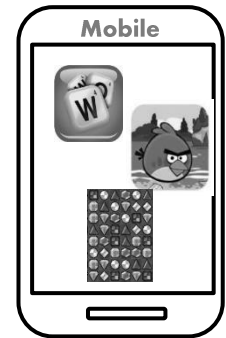
Do you download apps to your mobile device?
(US Adults 18+)
with a mobile device

70%

Which of the following types of apps do you use on your Smartphone or Tablet?
(Check all that apply) (asked of those who answered "Yes" to Downloading Apps)
Games (e.g. Angry Birds, Candy Crush, Words with Friends)

US Adults 18 and Older
(who download apps)

37% of the adult US population does Mobile Gaming

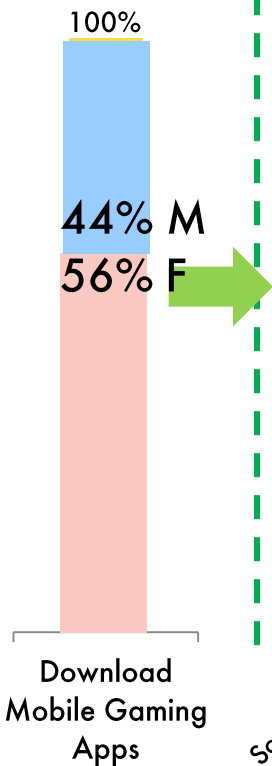


What Other Apps are Popular Among Male and Female Mobile Gamers?

37% of the overall US population are Mobile Gamers

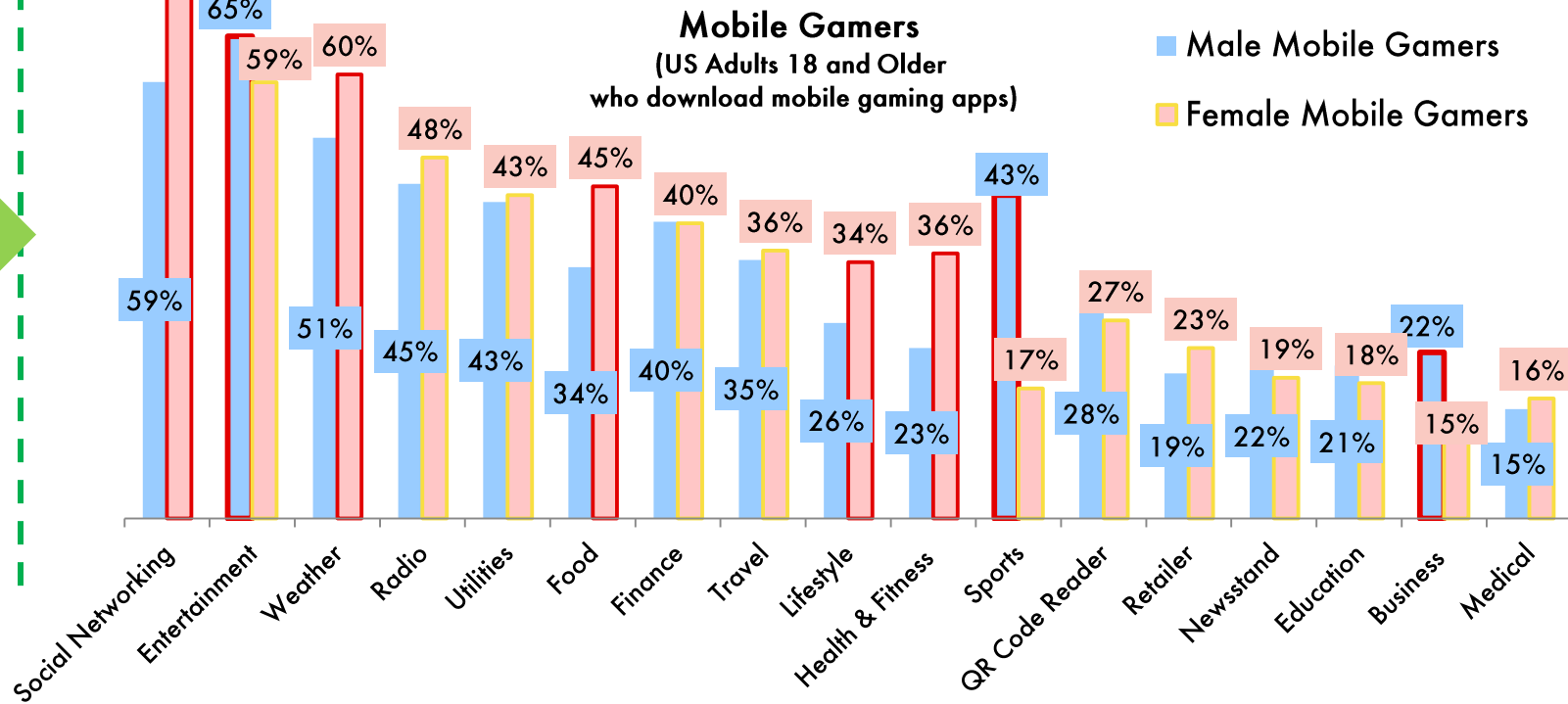
- Mobile Gamers more likely to be female
- Female Mobile Gamers more likely to download apps for: **Social Networking, Weather, Food, Lifestyle, Health**
- Male Mobile Gamers more likely to download: **Entertainment, Sports, Business apps**

Mobile Gamers



Which of the following types of apps do you use on your Smartphone or Tablet?

(Check all that apply) (asked of those who answered "Yes" to Downloading Apps)
Games (e.g. Angry Birds, Candy Crush, Words with Friends)



Who are Mobile Gamers?

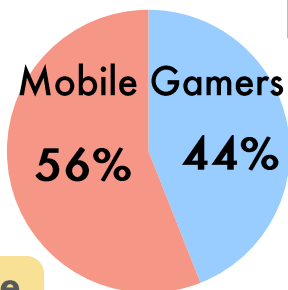
Young

Female

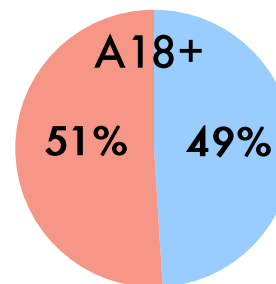
Professional

Higher Income

Purchase Influencer



Male
Female

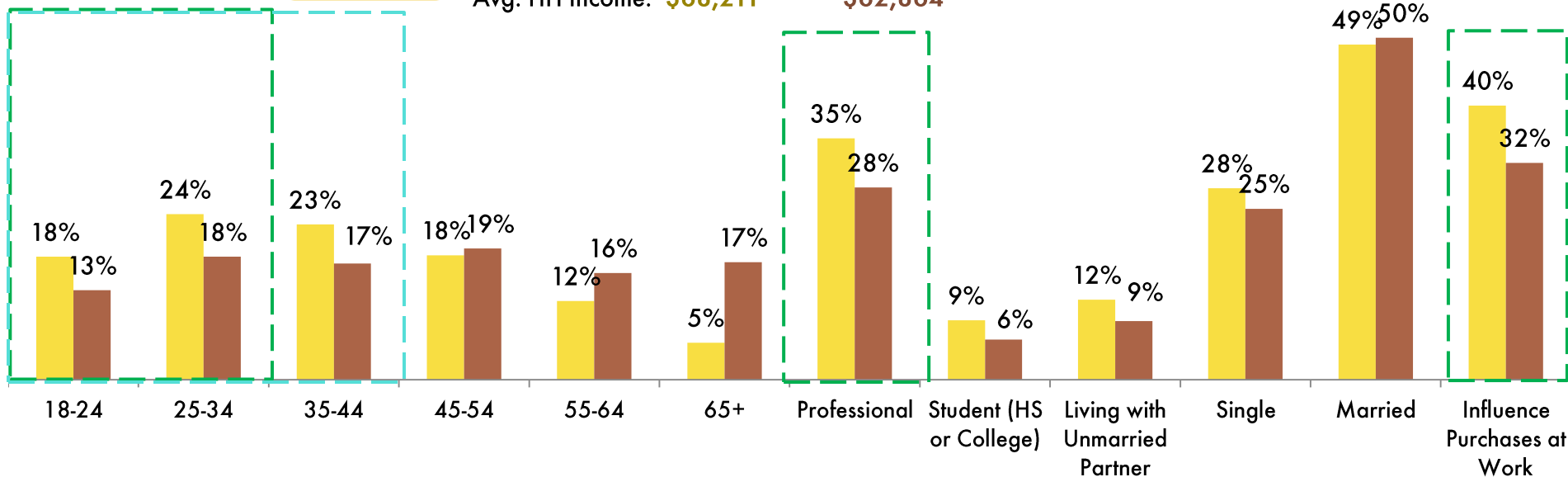


42% are under 35

65% are under 45

■ Mobile Gamers ■ Adults 18+
Avg. HH Income: \$68,211 \$62,864

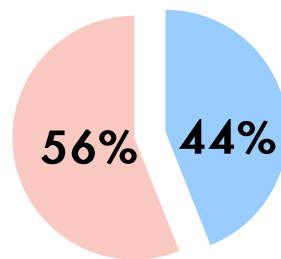
Student



Male and Female Mobile Gamers Are Different

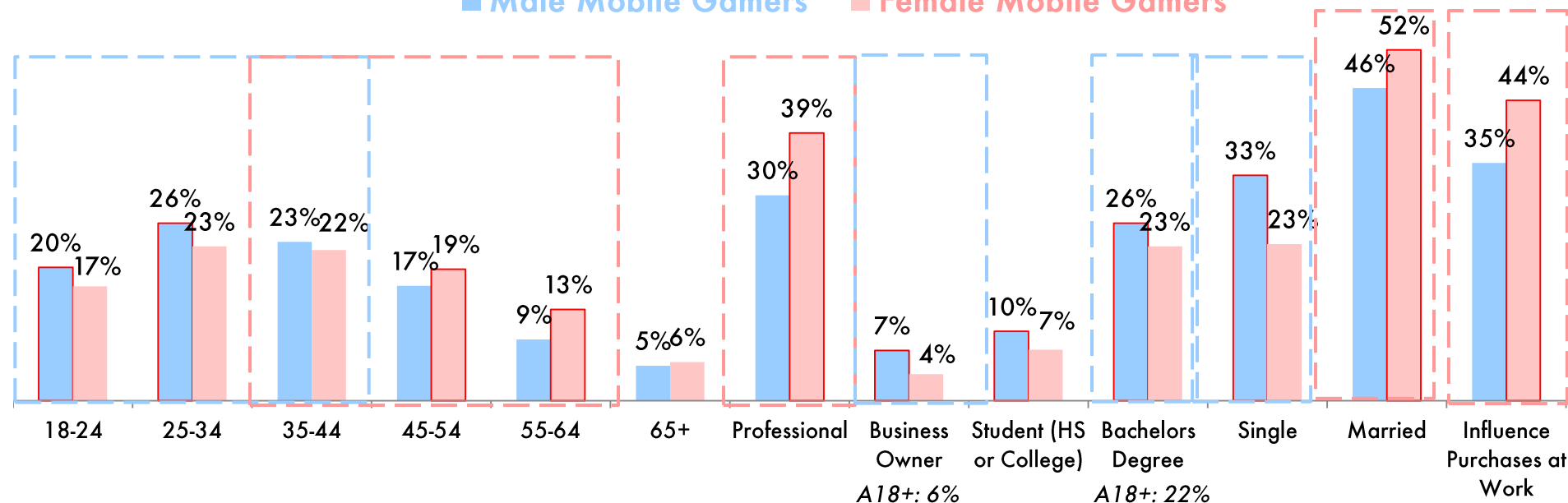
Female Mobile Gamers:
Professional
Purchase Influencer
Married

Mobile Gamers



Male Mobile Gamers:
College Graduate
Business Owner
Younger
Single
Student

■ Male Mobile Gamers ■ Female Mobile Gamers

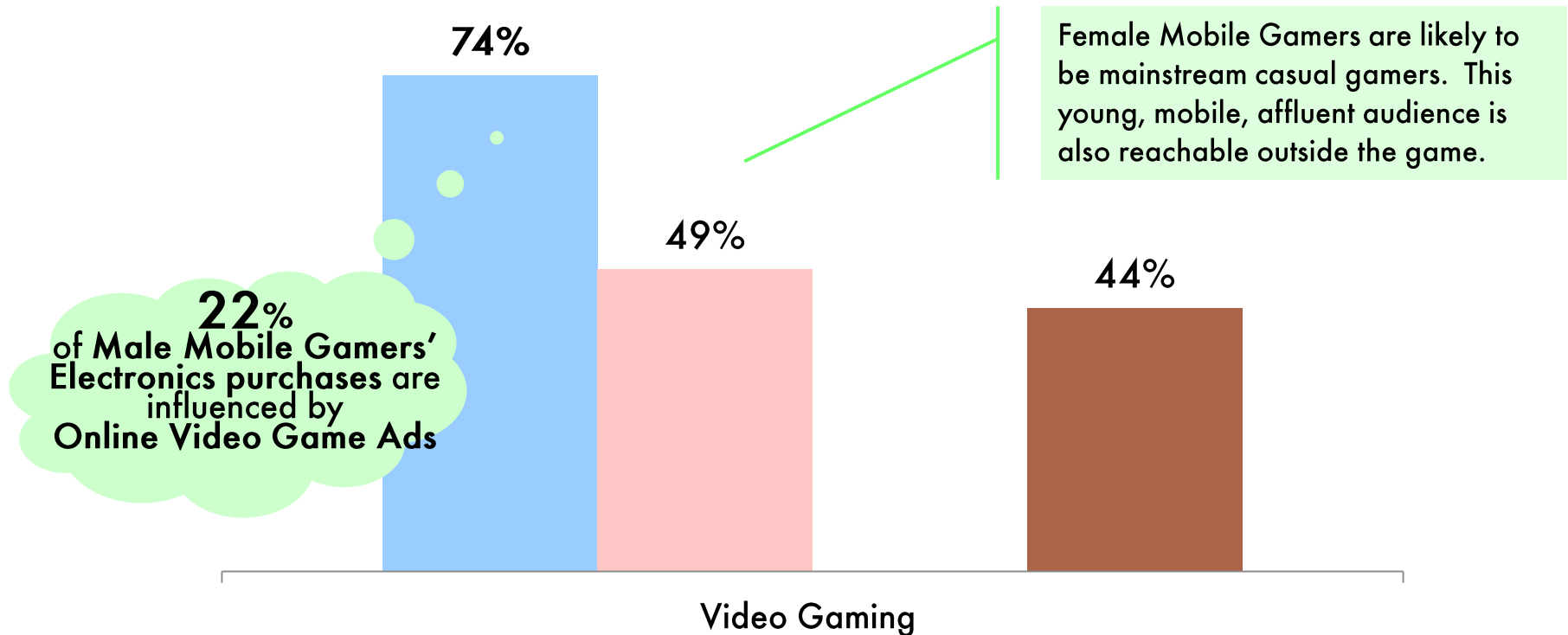


Male Mobile Gamers are Heavier Video Gamers While Female Mobile Gamers Play Only Slightly More than Average

- Implies that Female Mobile Gamers are more likely to be casual gamers

■ Male Mobile Gamers ■ Female Mobile Gamers ■ Adults 18+

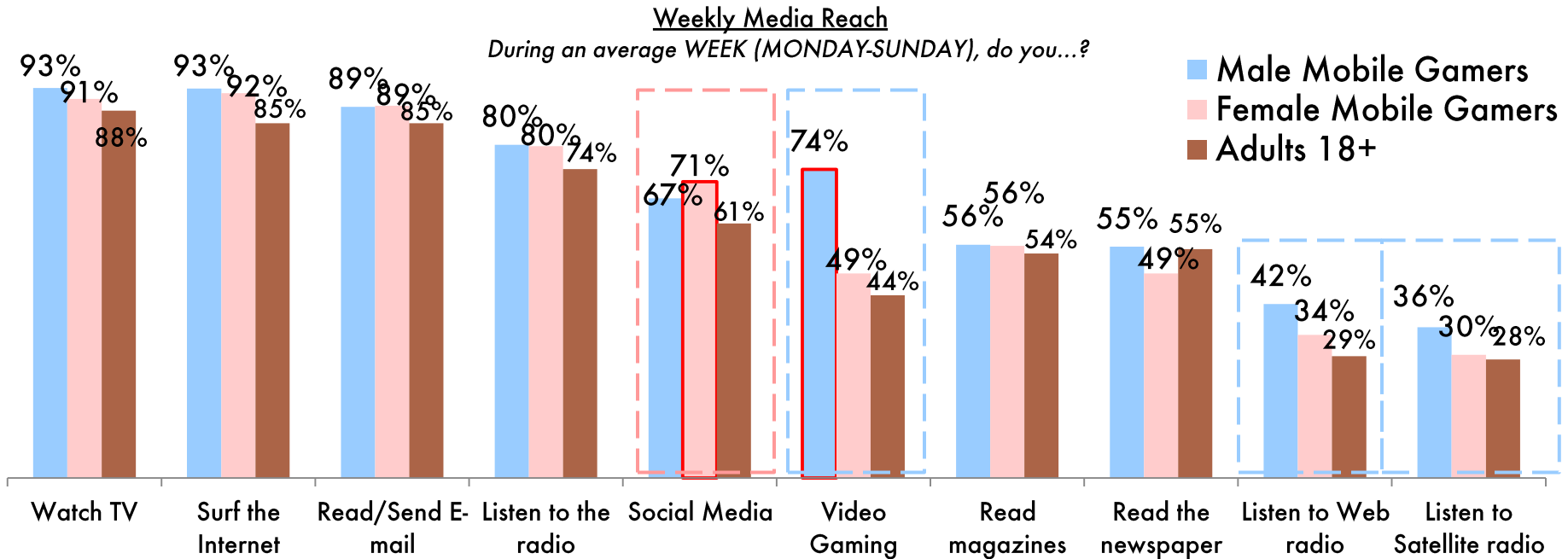
During an average WEEK (MONDAY-SUNDAY), do you...?



Mobile Gamers More Likely to Use Any Digital Media in a Given Week

Male Mobile Gamers More Likely to be Heavy Gamers

- Female Mobile Gamers more likely to use **Social Media**
- Male Mobile Gamers more likely to use **Video Games, Web & Satellite Radio**



Female Mobile Gamers:
Heavy Social Media Users

Male Mobile Gamers:
Heavy Video Gamers

Online and Satellite Radio Listeners

Mobile Gamers

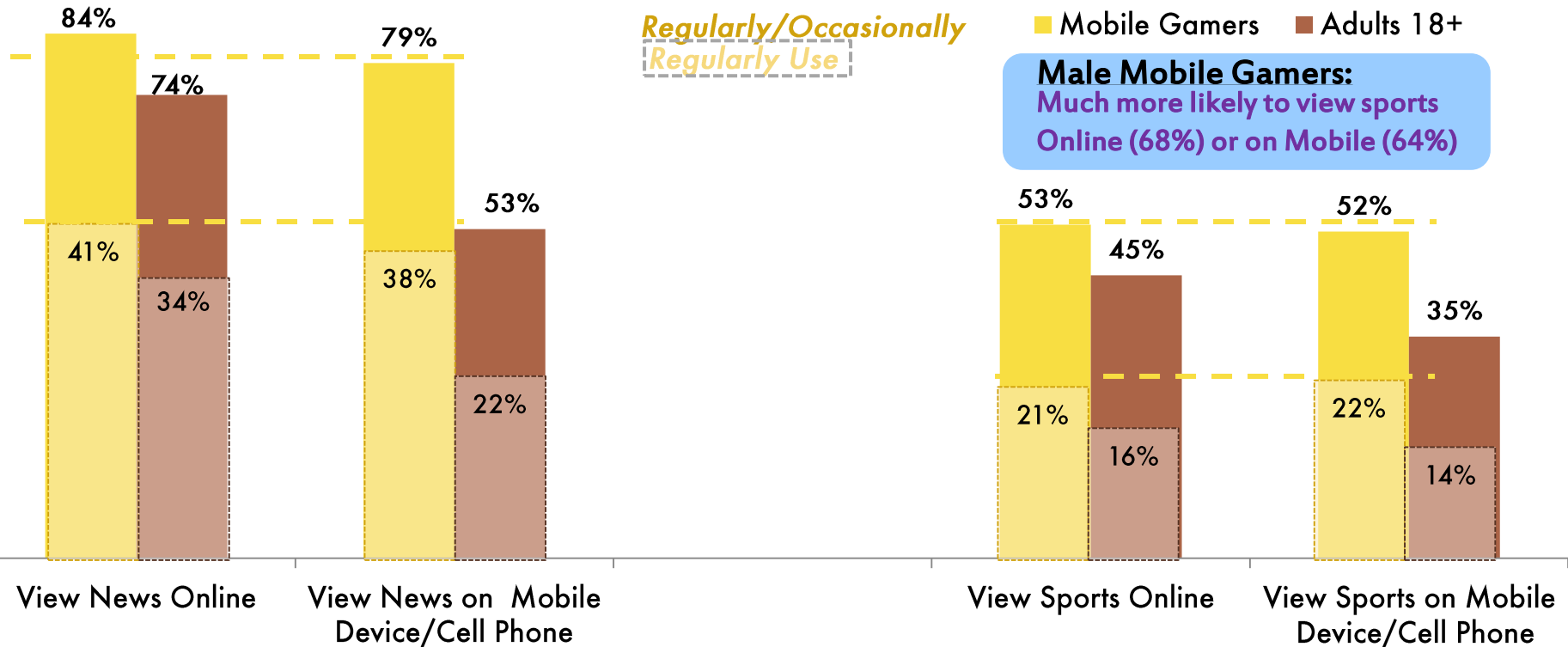
Mobile Devices and Usage

Mobile is Their Life

Mobile Gamers are About as Likely to View News or Sports on Mobile as Online

- In stark contrast to the general population, who is more likely to view these online
- Over three-quarters of Mobile Gamers view News online or on mobile
- Half of Mobile Gamers watch Sports online or on mobile

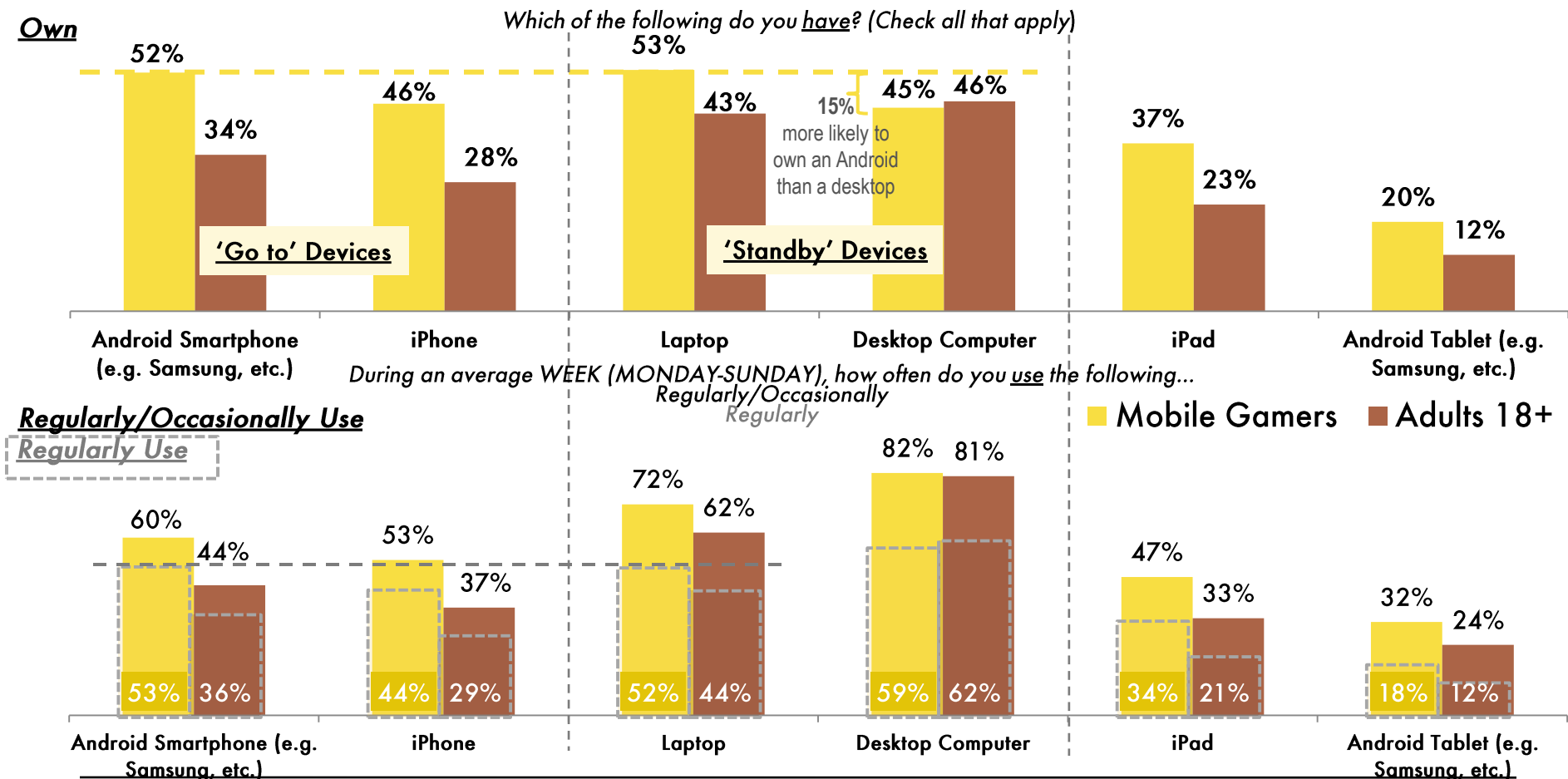
During an average WEEK (MONDAY-SUNDAY), how often do you use the following... (Check all that apply).



Mobile Gamers are More Likely to Own a Smartphone Than a Desktop Computer

Their Smartphone is Their Life – Replacing Their Computer

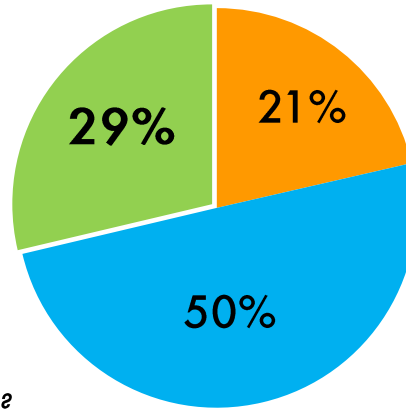
- Smartphones have become their 'go to' device while computers remain 'on standby'
- Mobile Gamers use their computers on occasion but they regularly use their smartphones as much as they use their laptops
- In contrast, the general US population is much more likely to own and use computers than smartphones



'My Smartphone is My Life'

Which of the following best describes how you use your Smartphone?

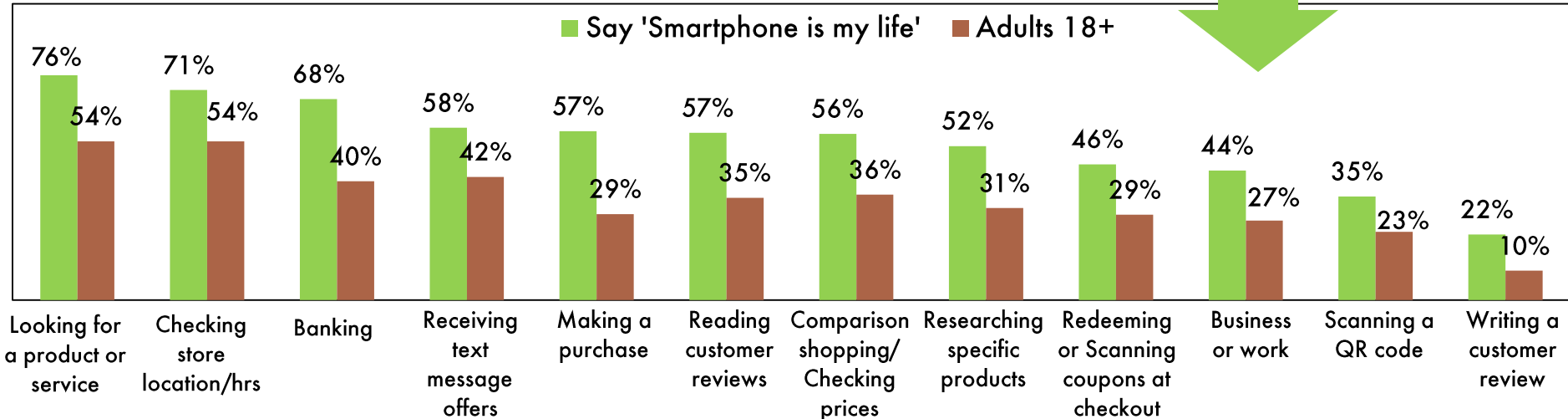
**Those Who Say
'My Smartphone is My Life'
are also More Likely to Use
Their Smartphone for:**



- I use my smartphone for basic functions (call, text, email)
- I use my smartphone for basic functions and some applications (weather, GPS, social media - e.g. Facebook, Twitter, etc.)
- I use my smartphone for all the functions - it's my life.

Do you use your Smartphone for any of the following activities?
(Check all that apply)

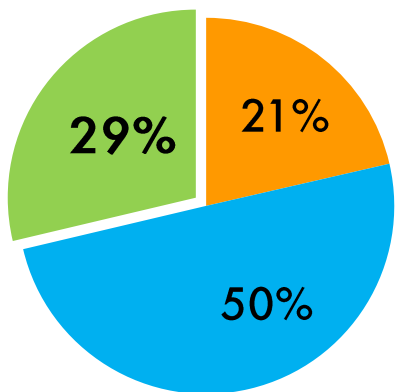
Adults 18+



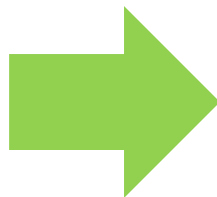
Those Who Say 'My Smartphone is My Life' are Financially Optimistic

Which of the following best describes how you use your Smartphone?

- I use my smartphone for basic functions (call, text, email)
- I use my smartphone for basic functions and some applications (weather, GPS, social media - e.g. Facebook, Twitter, etc.)
- I use my smartphone for all the functions - it's my life.



Adults 18+



Hot or Not?

↑ Hot: iPhone 6 (65% vs. 50% A18+)

↑ Hot: Samsung Galaxy S5 (65% vs 56% A18+)

Smartphone

Those Who Say 'My Smartphone is My Life' are also More Likely to:

Have a more **positive outlook on the economy**:

- **47%** (vs. 32%A18+) are **confident of a strong economy** in the next 6 mos.
- **41%** (vs. 35% A18+) expect the economy to fully **rebound** to pre-crash levels

Have a **better personal economic situation**:

- **63%** (vs. 41% A18+) are **employed full time***
- **23%** (vs. 18% A18+) '**feel wealthier**' than yr ago
- **30%** (vs. 24% A18+) have a '**Live for today**' attitude on **spending**

Spend on **Clothing and Electronics**:

- Feel **importance** of newest **trends** and styles in clothing (**33%** vs. 19% A18+) and familiar clothing **labels** (**65%** vs 50% A18+)
- Spend **more on shoes** (**\$41** vs \$32 A18+)
- Shop for **Electronics Online** (**19%** vs 14% A18+)
- Have **deferred** purchases last month of **Clothing** (**34%** vs. 31%A18+), **Electronics** (**26%** vs 22%A18+), **Entertainment** (**34%** vs. 28% A18+)
- **45%** (vs. 41%A18+) **plan to spend same or more on holiday gifts** this year.

*Includes retirees. See appendix for full questions

Mobile Gamers are Planning Major Purchases And Here's How to Reach Them

Research, Showrooming and Ad Influence

Mobile Gamers are Planning Major Purchases

- Mobile Gamers are more likely than the general population to be planning major purchases of all kinds
- Top big ticket items that Mobile Gamers are planning to buy include a car, a new computer or vacation travel.

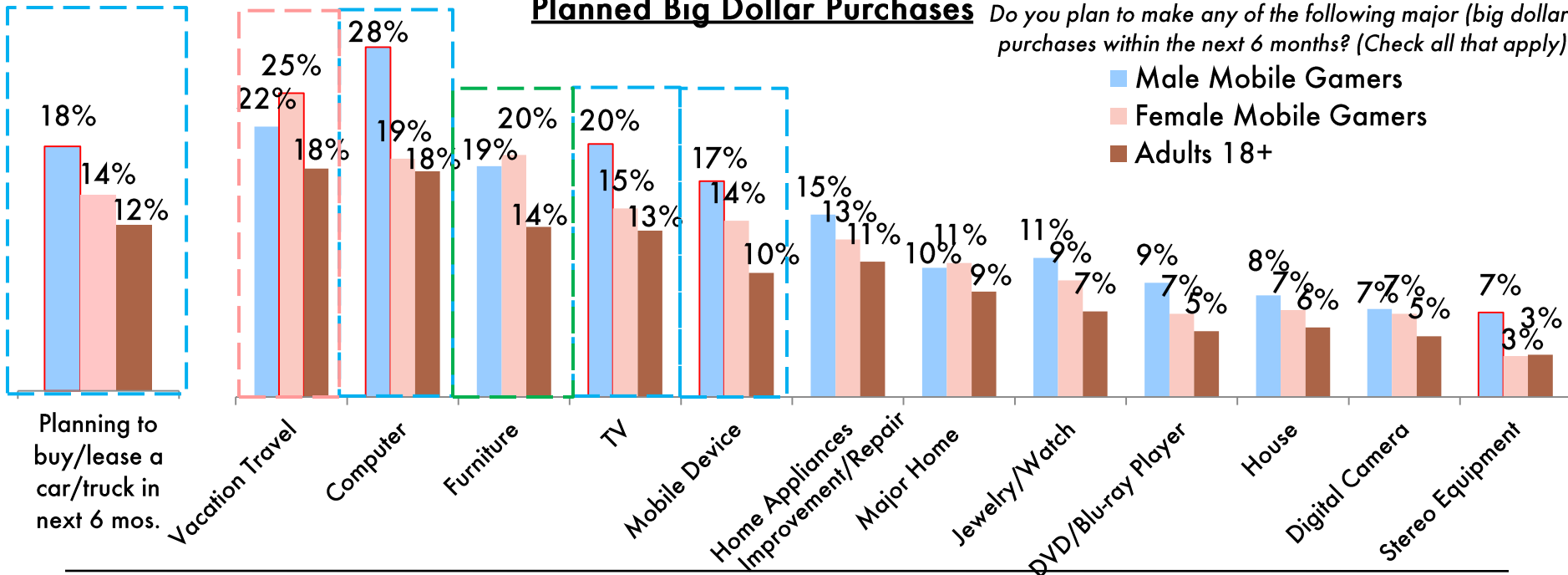
Female Mobile Gamers:
 More likely to be planning a Vacation (25%)
 or to buy Furniture (20%)

Male Mobile Gamers:
 More likely to be planning to purchase an Auto (18%),
 Computer (28%), TV (20%), Mobile (17%) or Stereo (7%)

Planned Big Dollar Purchases

Do you plan to make any of the following major (big dollar) purchases within the next 6 months? (Check all that apply)

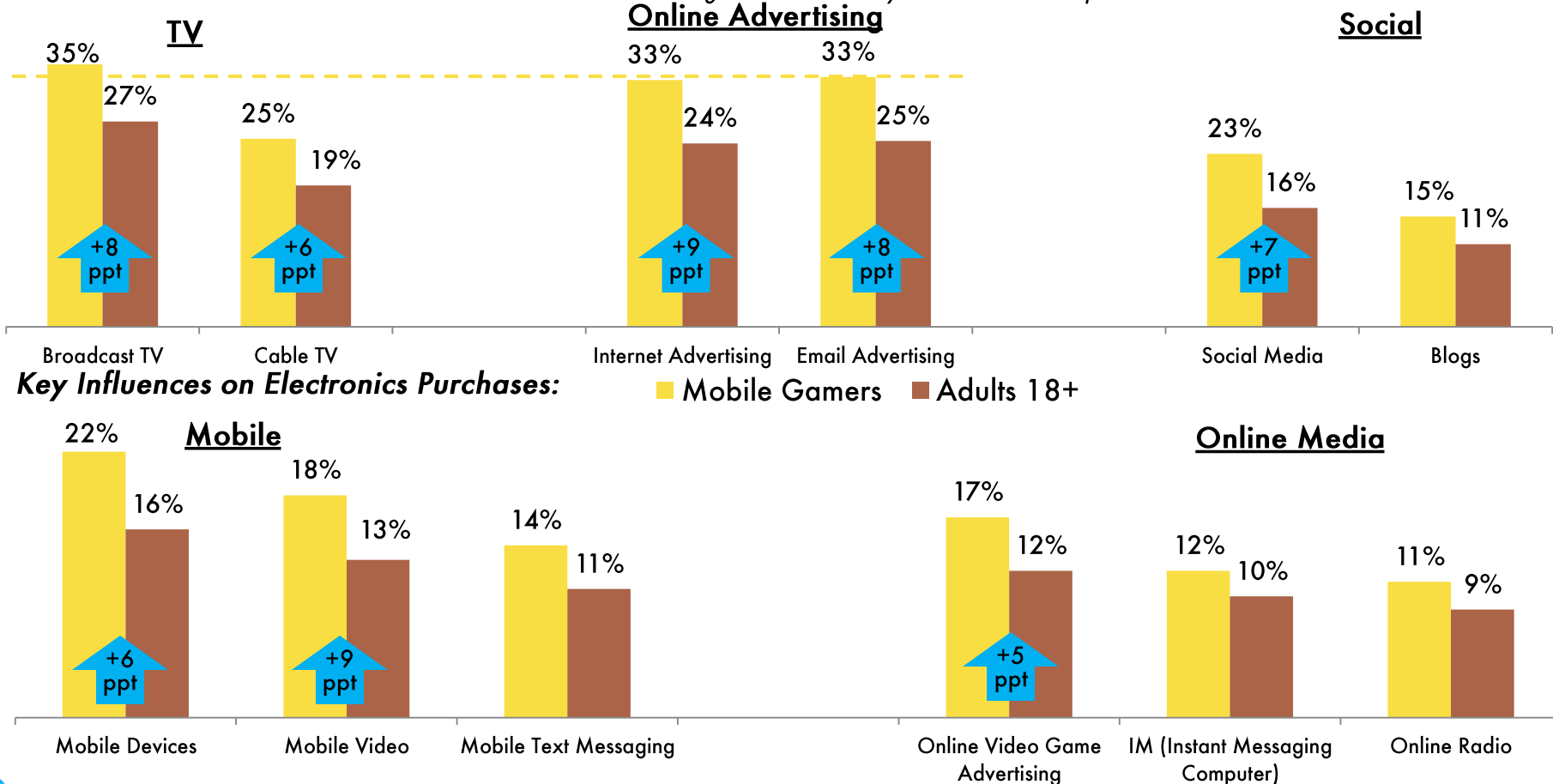
■ Male Mobile Gamers
 ■ Female Mobile Gamers
 ■ Adults 18+



Mobile Gamers' Electronics Purchases Are More Influenced by Digital and Mobile Media

- Email and Internet ads have much more influence on Mobile Gamers' Electronics purchases than Cable TV does and are almost as influential as Broadcast TV

Please tell us which of the following media influences your ELECTRONICS purchases:

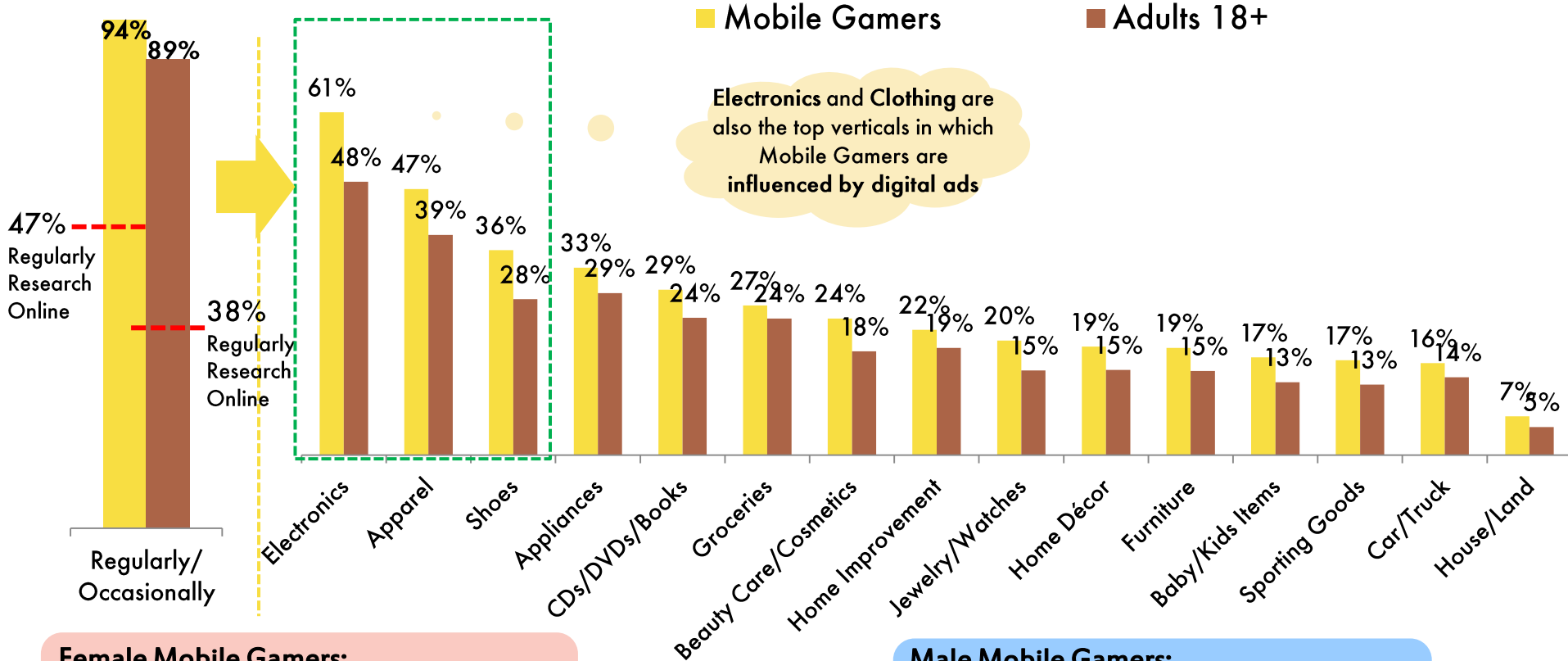


Blue Arrows indicate a much larger likelihood (by percentage point difference, +x% ppt) of Mobile Gamers to be influenced by this media than is the General Population.

Mobile Gamers Research Products Online Before Buying... Especially Electronics and Clothing

How often do you research products online before purchasing them in person or in a store?

Over the last 90 days, which types of products did you research online before buying them in person? (Check all that apply) (Those who answered "Regularly" or "Occasionally" to Researching Online)



Female Mobile Gamers:

More likely to research before buying Clothing (52%), Cosmetics (36%), Décor (23%)

Male Mobile Gamers:

More likely to research before buying Electronics (72%), Auto (20%), Sports (24%)

Internet Ads are More Likely to Influence Mobile Gamers' Purchases

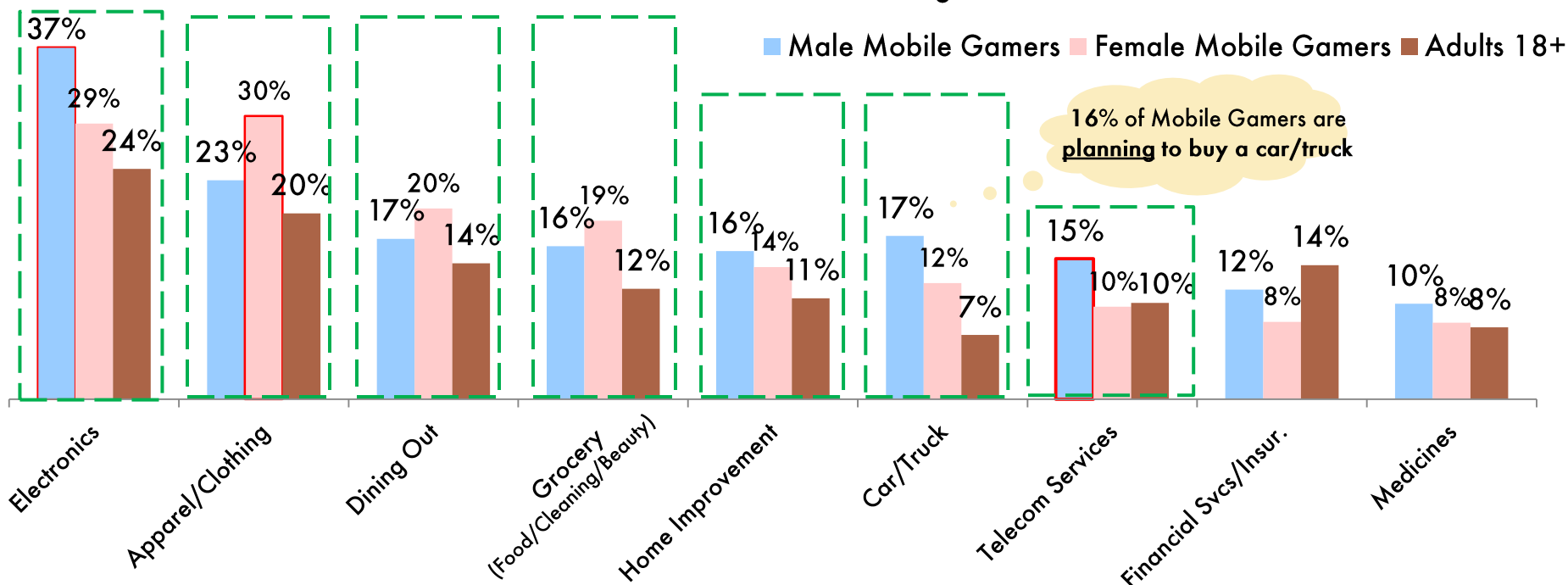
Especially Electronics and Clothing

- **Electronics and Clothing are also the top products for which Mobile Gamers do online research, presenting an ideal environment to serve ads**
- **Internet Ads are much more likely to influence Male Mobile Gamers' Electronics, Auto, Telco, Financial purchases and Female Mobile Gamers' Clothing purchases**

For each of the following retail categories, please tell us which of the following media influences your purchases.

(Please check all that apply): (Internet Advertising)

Influence of Internet Advertising on Purchases



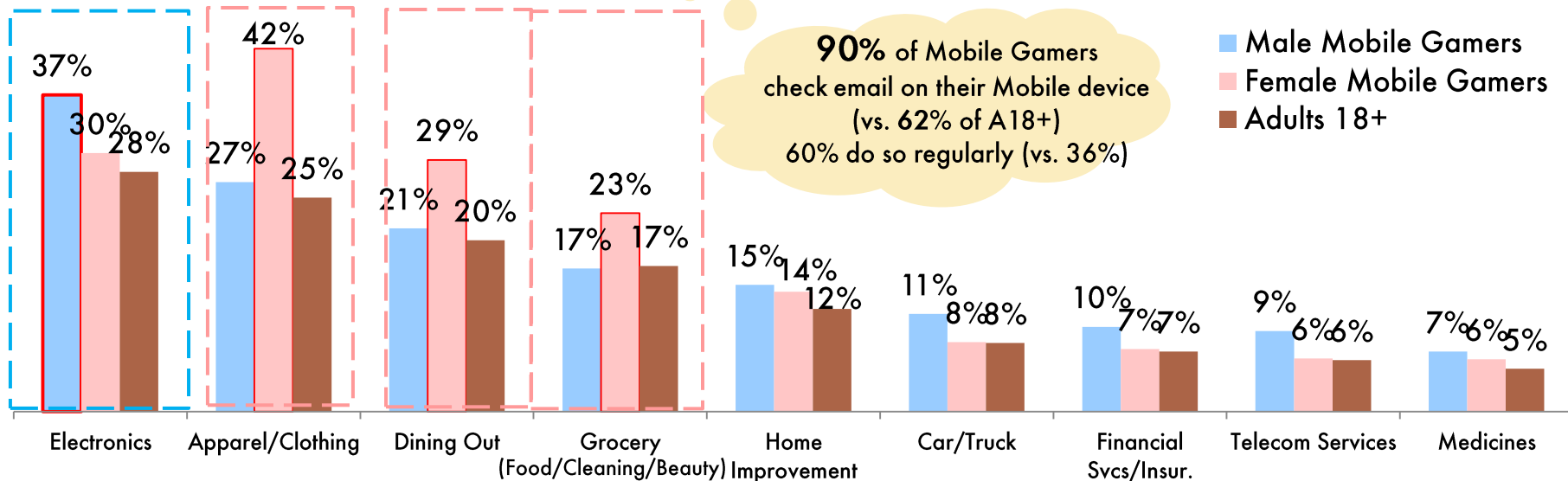
Email Also Influences Mobile Gamers' Purchases

Especially Electronics, Clothing and Dining Out

- **Mobile Gamers check email on their mobile phones regularly. They also showroom, research and buy from their mobile. Email them to influence their purchases while in the store.**
- **Email is more likely to influence Male Mobile Gamers' **Electronics** purchases and Female Mobile Gamers' **Clothing, Dining, Grocery** purchases.**

Influence of Email Advertising on Purchases

For each of the following retail categories, please tell us which of the following media influences your purchases.
(Please check all that apply): (Email Advertising)



IAB

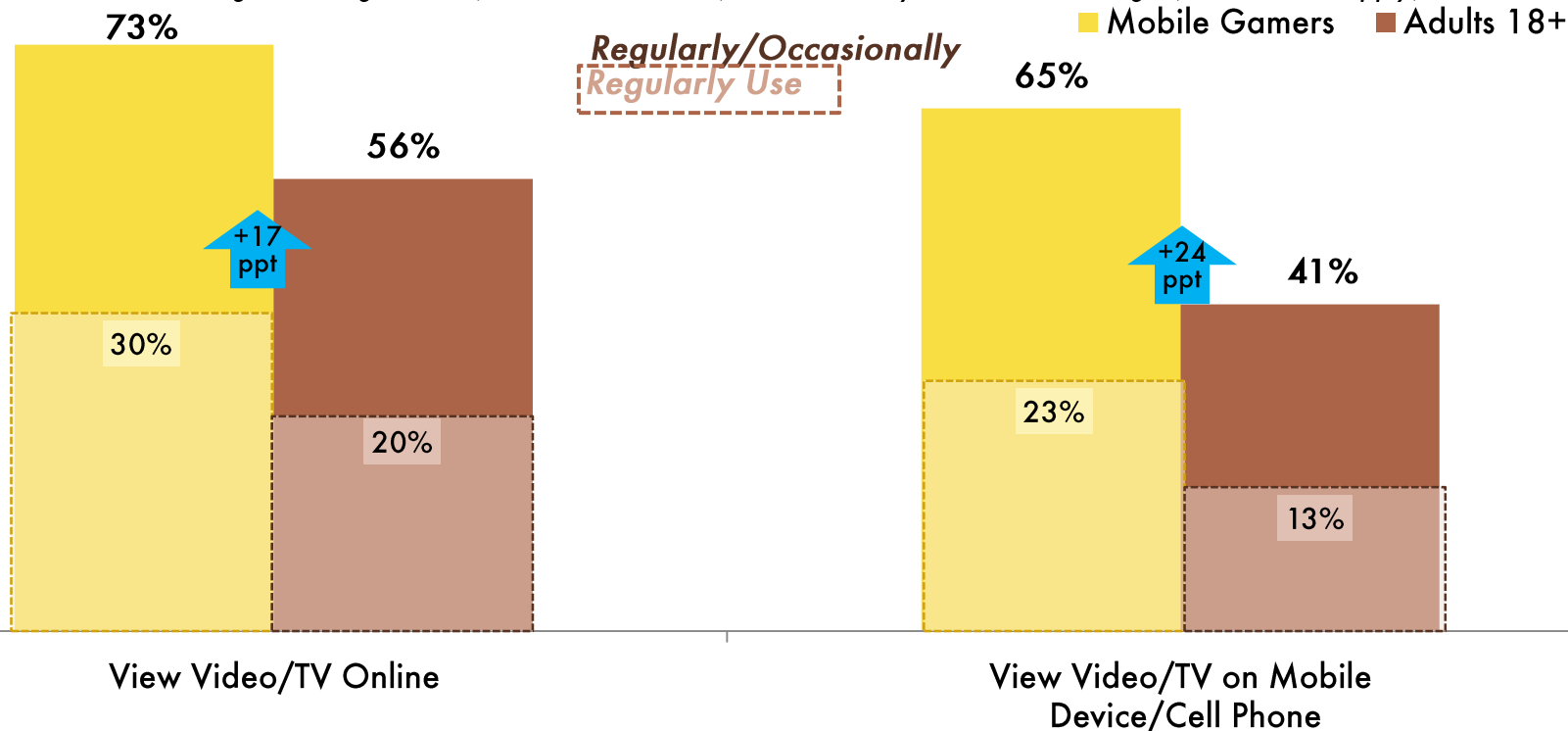
Video

Mobile Gamers

Mobile Gamers Are Much More Likely to Watch Video Online and on Mobile Devices

- Three in four watch Video/TV online and two-thirds watch on their mobile compared to about half of the general population who does so

During an average WEEK (MONDAY-SUNDAY), how often do you use the following... (Check all that apply)

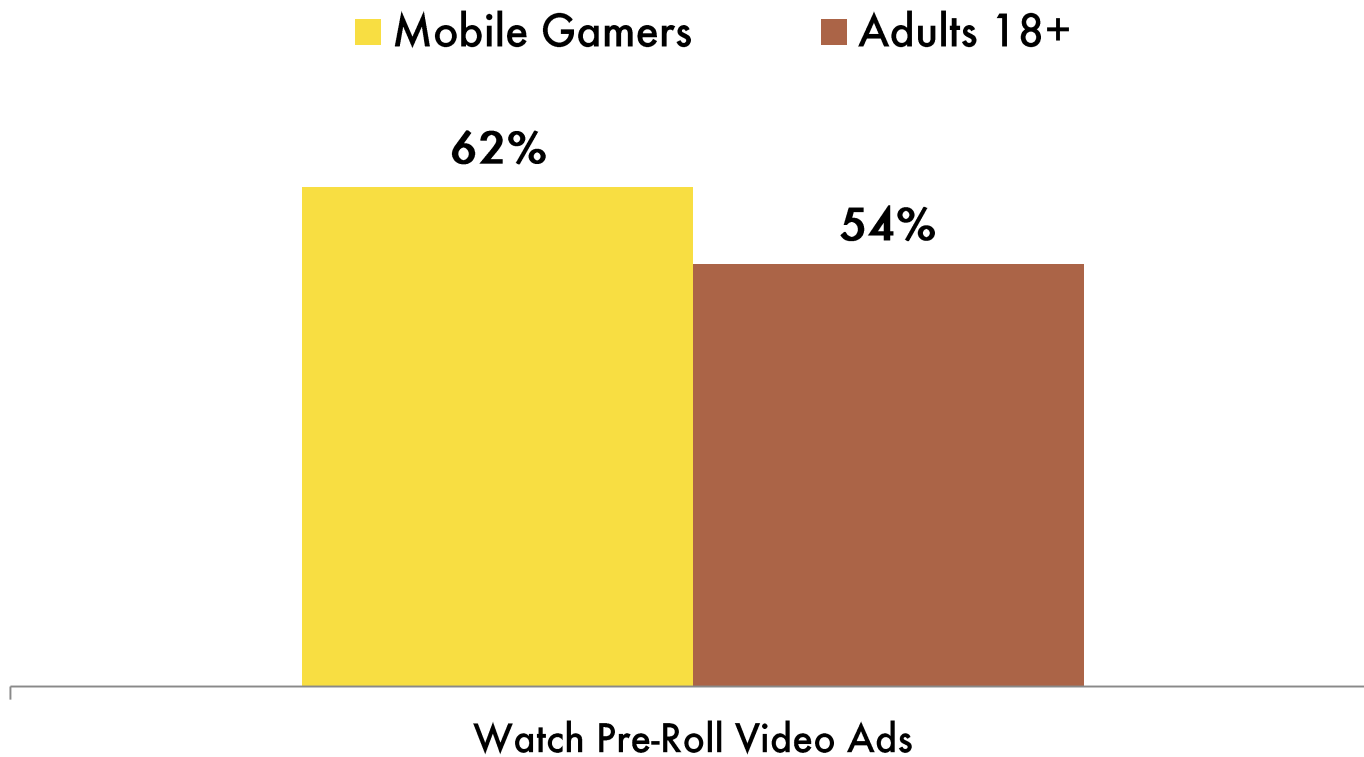


Blue Arrows indicate a much larger likelihood (by percentage point difference, +x% ppt) of Mobile Gamers to watch video on this medium as compared to the General Pop.

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 N = 15,410 A18+, N = 5,727 Mobile Gamers

Mobile Gamers Watch Video Ads

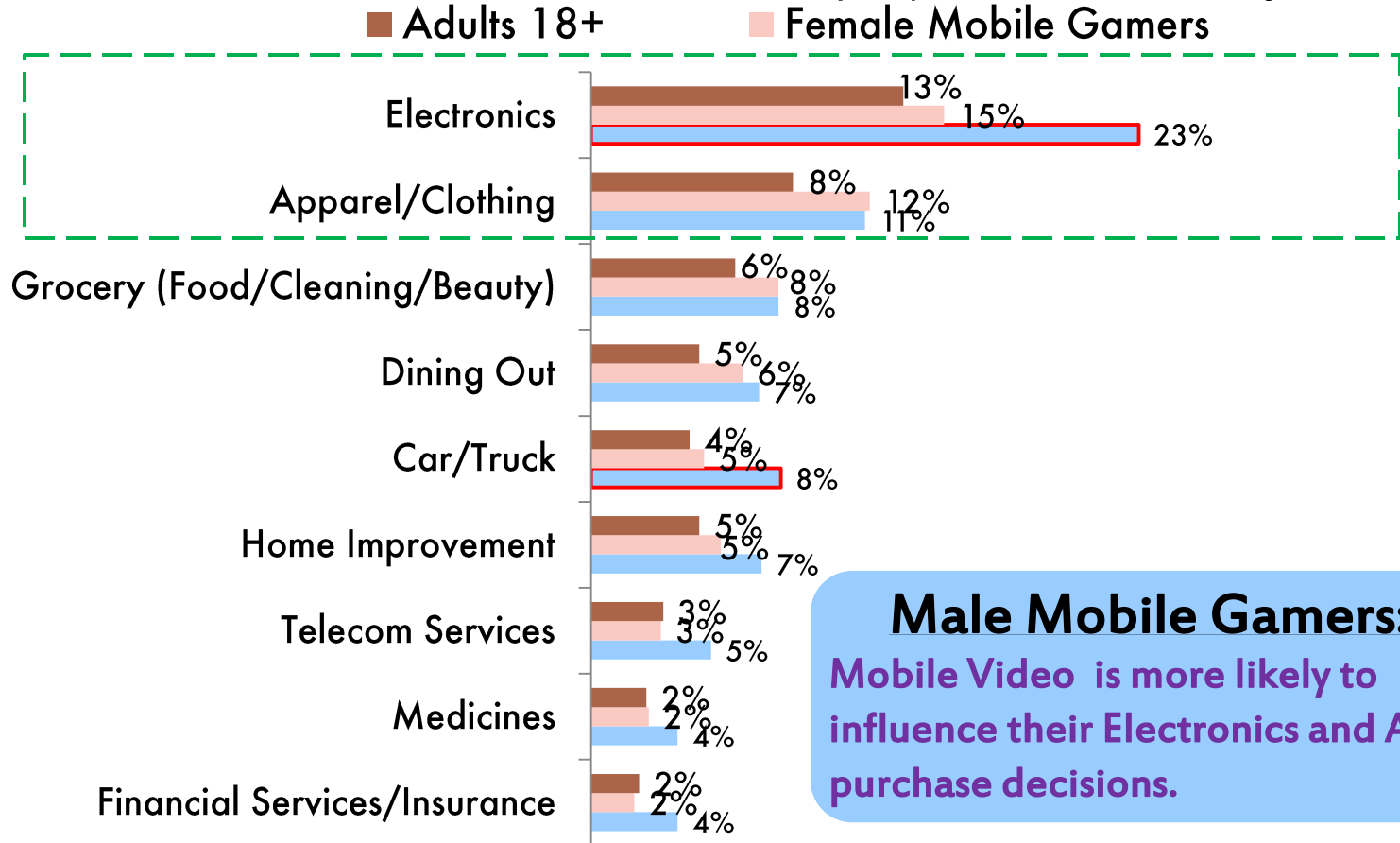
*Many websites play a video commercial prior to playing the video content.
Please tell us how often you watch those commercials. (Regularly/Occasionally)*



Mobile Gamers' Electronics and Clothing Purchases are More Influenced by Mobile Video Ads

- Male Mobile Gamers are much more likely to be influenced by Mobile Video in their **Electronics** purchases

Please tell us if Video on Mobile Devices influences your purchases of the following:



Male Mobile Gamers:
 Mobile Video is more likely to influence their Electronics and Auto purchase decisions.

Mobile Gamers

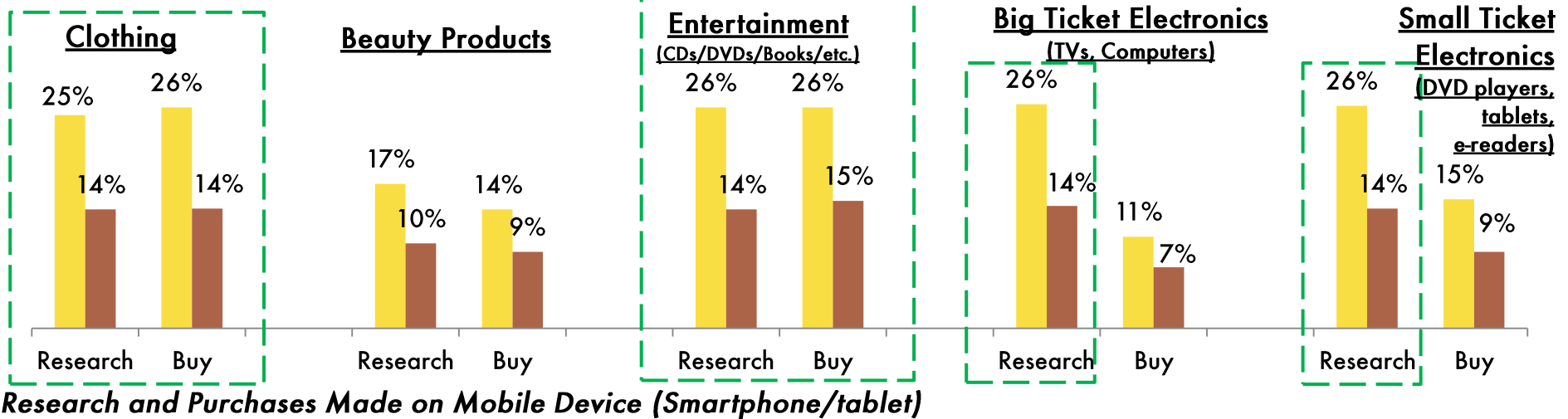
Mobile Influence and Showrooming

Mobile Gamers also Research and Buy Products on their Mobile Devices

- They're most likely to use their mobile devices to research Electronics, Clothing, Entertainment and Appliances
- They're most likely to use their mobile devices to buy Clothing and Entertainment

Which of these ways do you research the following items before purchasing? (Mobile device (Smartphone/tablet)
 Have you ever purchased any of the following items on a mobile device, online on a computer, or in a store? (Mobile device (Smartphone/tablet)

Green box indicates that Mobile Gamers are significantly more likely to research or buy this product on their mobile.



Research and Purchases Made on Mobile Device (Smartphone/tablet)

Female Mobile Gamers:
 More likely to use mobile to research Beauty (22%)
 and buy Clothing (29%), Beauty (17%)

Male Mobile Gamers:
 More likely to use mobile to research Big Electronics (29%)
 and buy Small Electronics (18%)

Their Mobile Devices in Turn Influence Mobile Gamers' Purchases

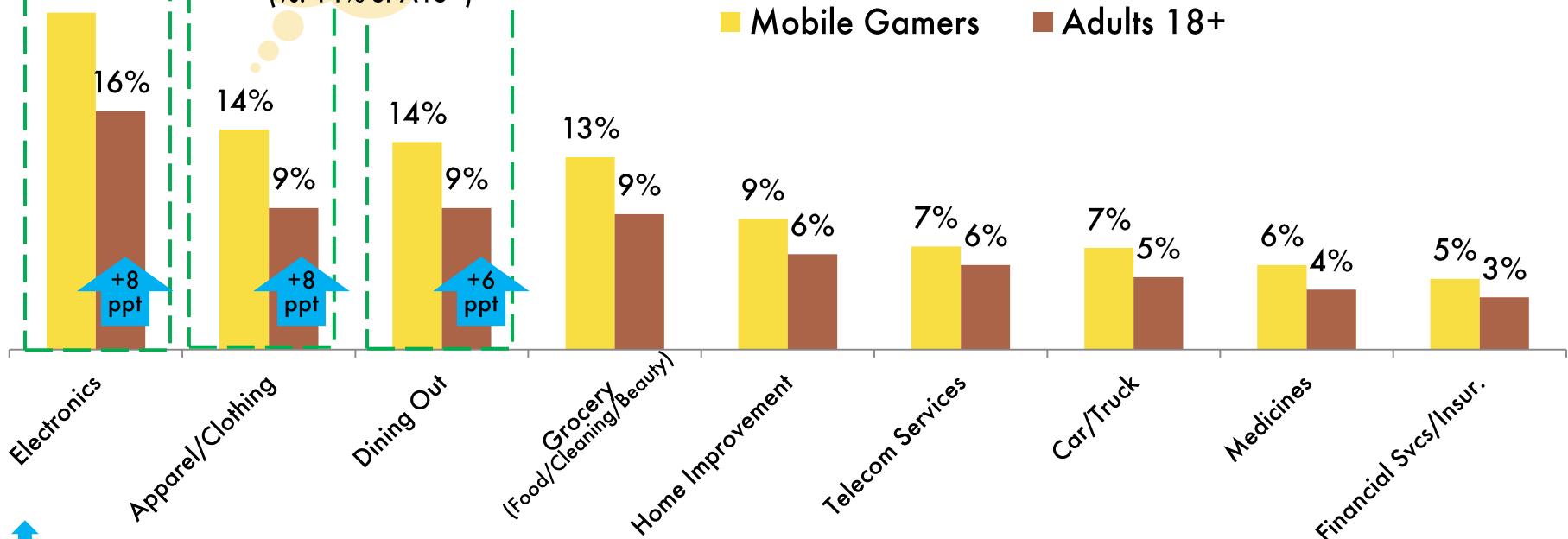
● Especially Electronics, Clothing and Dining Out

1 in 4
Mobile Gamers Research
Electronics using their
Mobile device
(vs. 14% of A18+)

1 in 4
Mobile Gamers
Research or Buy Clothing
using their
Mobile device
(vs. 14% of A18+)

For each of the following retail categories, please tell us which of the following media influences your purchases. (Please check all that apply): (Email Advertising)

Influence of Mobile Devices on Purchases



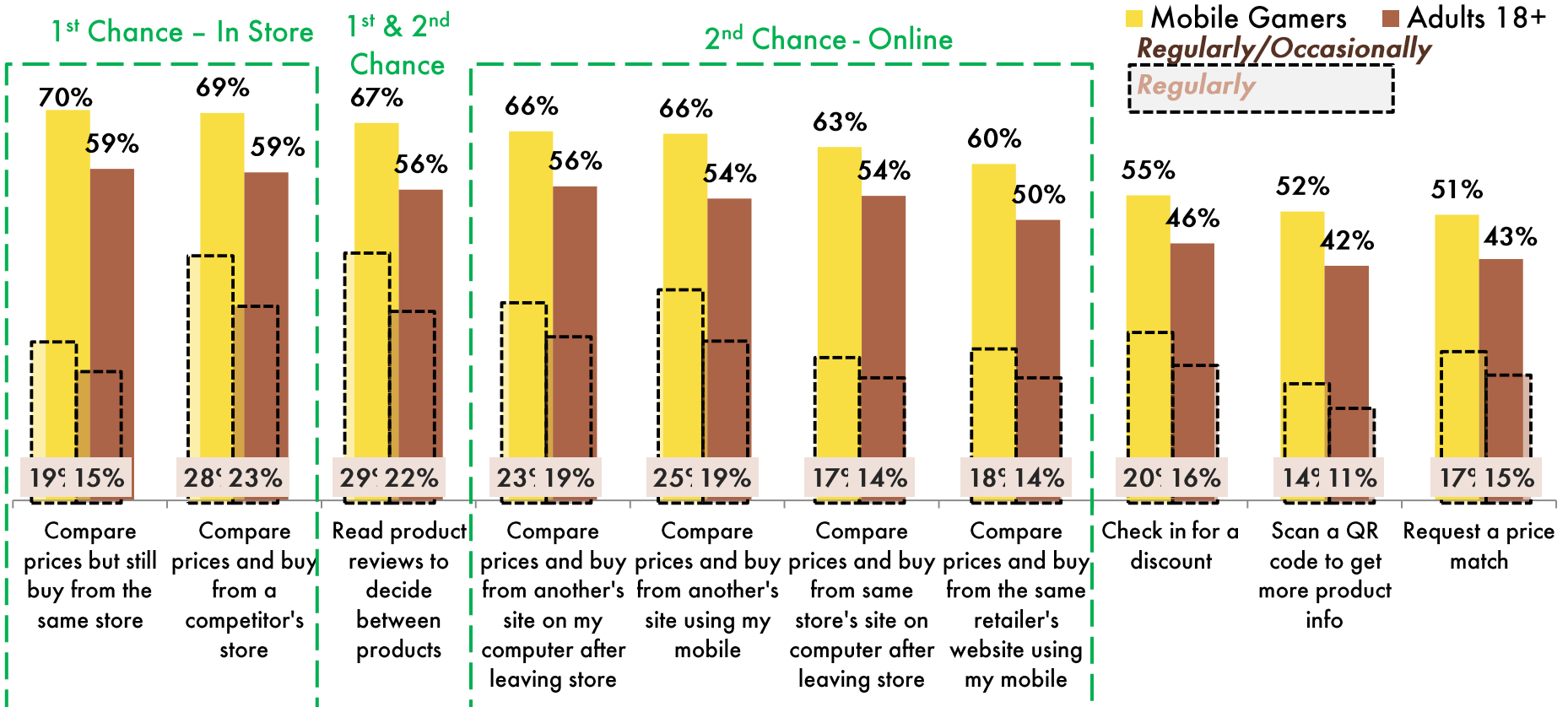
Blue Arrows indicate a much larger likelihood (by percentage point difference, +x% ppt) of Mobile Gamers to be influenced in this purchase than is the Gen. Pop.

Here's How Mobile Influences them while in the Store:

Showrooming and Mobile Shopping

- At least two-thirds of Mobile Gamers check prices or read reviews on their phones while in the store
- Price checking leads them to in-store purchase... yours or your competitors
- This presents an opportunity to serve a mobile ad, email coupon, targeted offer or price guarantee to close the sale – first chance is in-store, second chance is after they leave and buy online

How often do you do any of the following on your smartphone or tablet while shopping in a store?:



After Purchasing, the Cycle Continues:

Social Influence

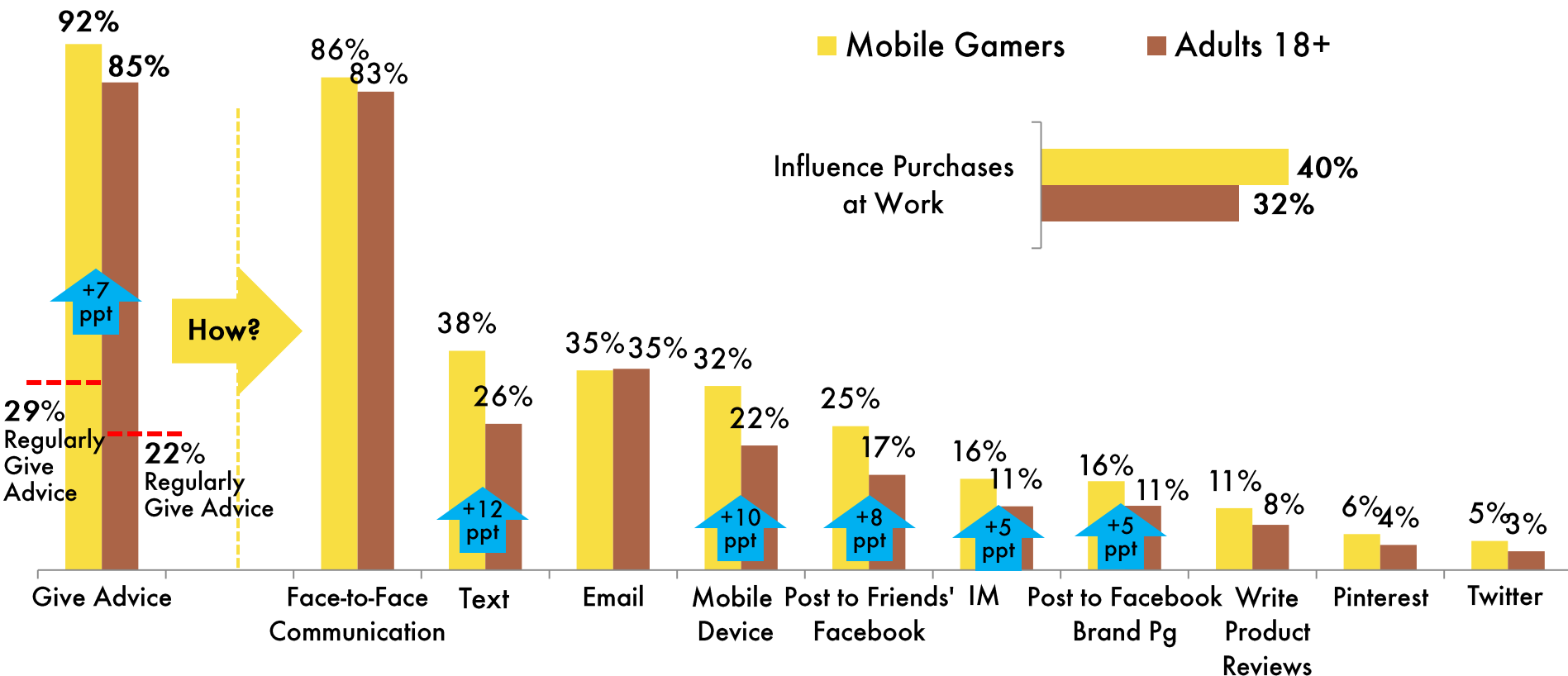
Mobile Gamers are Influencers

After Purchasing, the Cycle Continues:

Mobile Gamers Influence Others' Purchases... Mostly Digitally

Do you give advice to others about products or services you have purchased?
(Regularly/Occasionally)

How do you give advice to others about products and services you have purchased?
(Check all that apply)

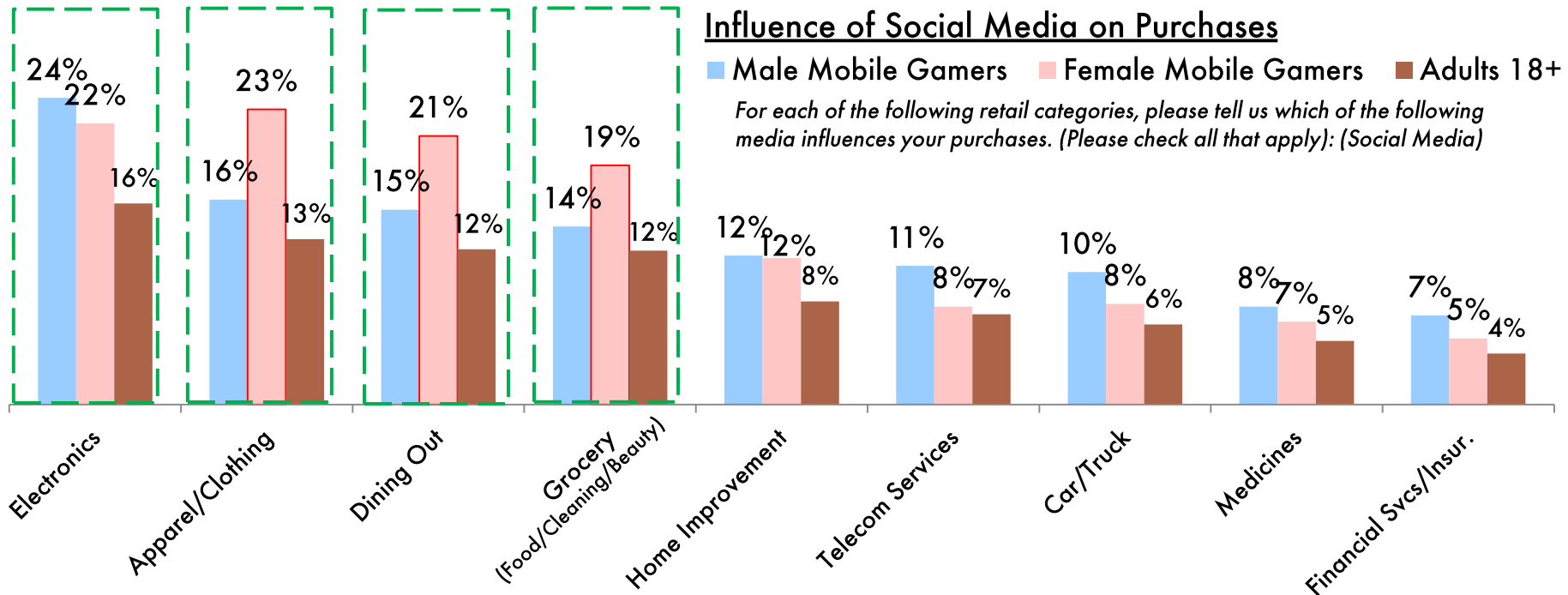


Blue Arrows indicate a much larger likelihood (by percentage point difference, +x% ppt) of Mobile Gamers than A18+ to influence others using this media.

Social Media Influences Mobile Gamers' Purchases

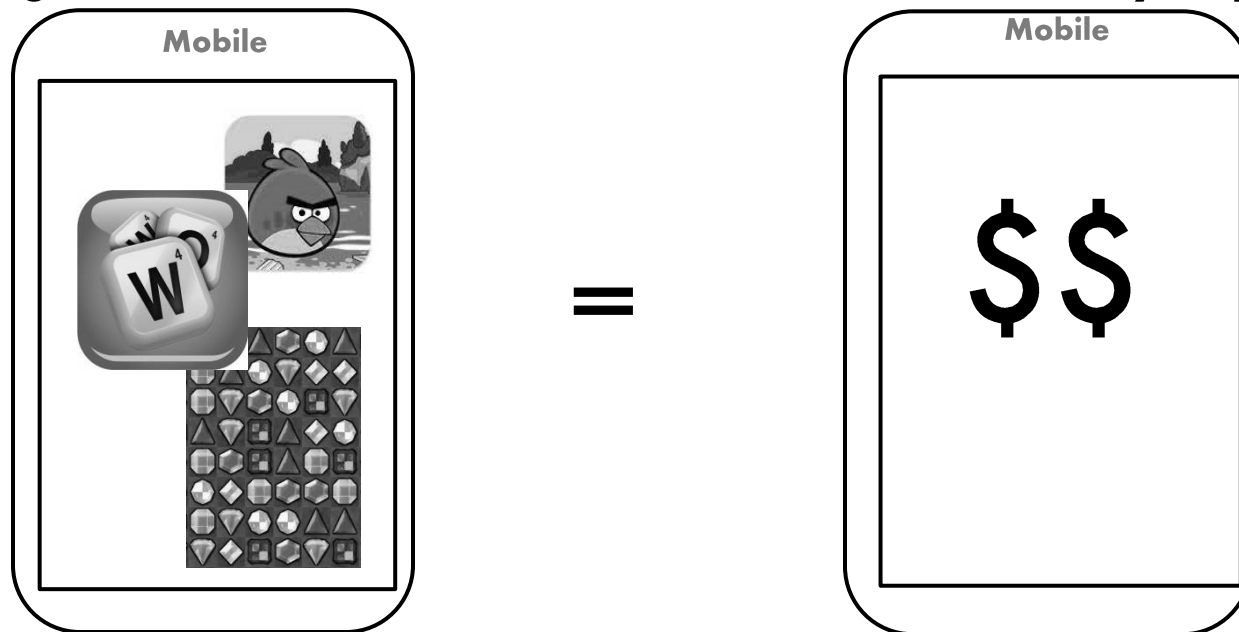
- Especially Electronics, Clothing and Dining Out
- Social Media is much more likely to influence Female Mobile Gamers' **Electronics, Clothing, Dining, Grocery** purchases and Male Mobile Gamers' **Electronics** purchases.

25% of Mobile Gamers say they give product advice by posting to friends' Facebook pages (vs. 17% A18+) and 16% (vs. 11% A18+) give advice on Facebook brand pages.



Mobile Gamers Respond to Digital and Mobile Ads

- In summary, Mobile Gamers can be reached beyond their gaming apps since they are heavy digital and mobile users.
- Mobile Gamers are upscale and planning to spend... and they shop armed with a smartphone.
- Digital and Mobile ads are likely to influence their purchases so intercepting their online research with ads and offers is likely to pay off.



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IAB Mobile Gamers

Who They Are, How They Shop, and
How to Reach Them

Questions?

Kristina Sruoginis
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Appendix

Mobile Gamers

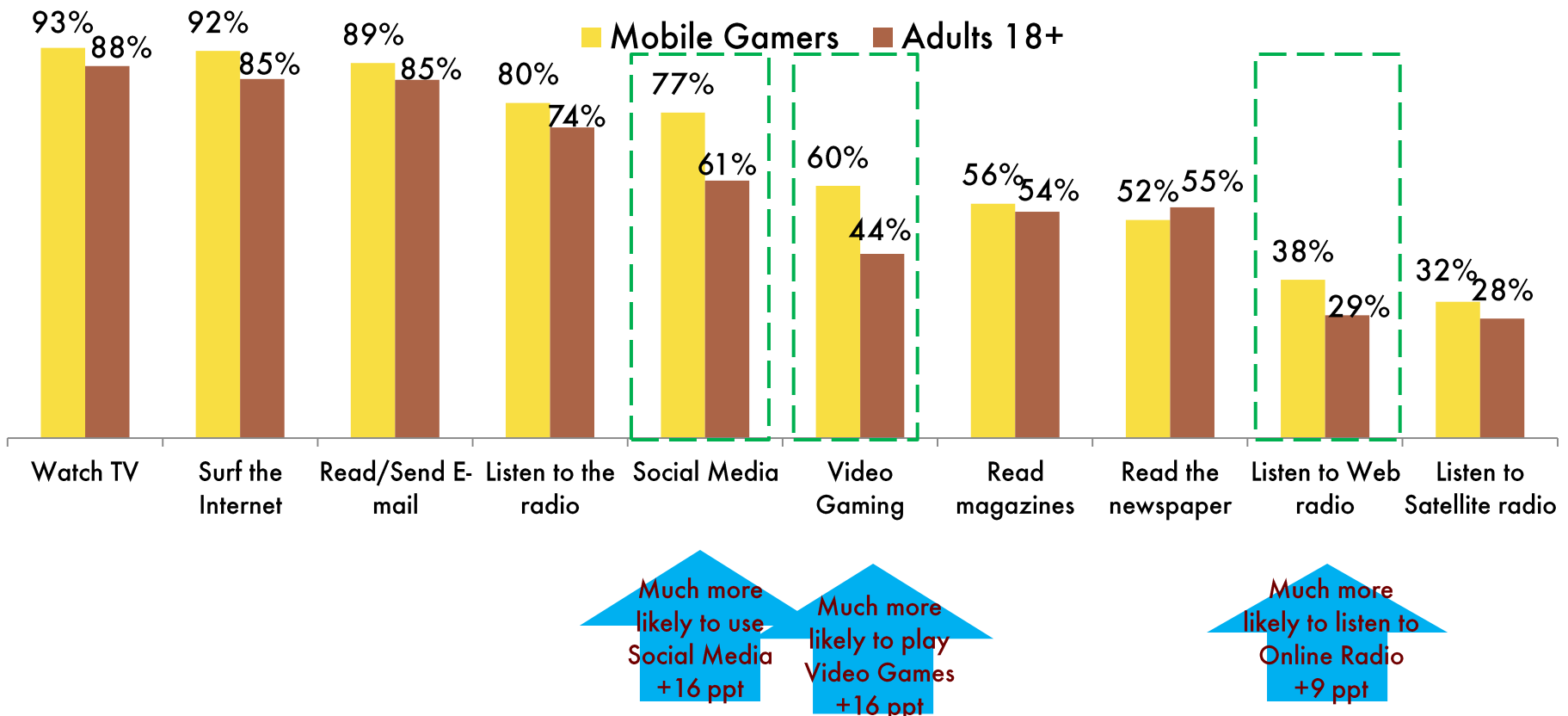
Questions?

Kristina Sruoginis
IAB Research Director
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Mobile Gamers Use All Media More, Especially Digital

During an average WEEK (MONDAY-SUNDAY), do you...?

Weekly Media Reach



Arrows (ppt) indicate that Mobile Gamers are much more likely than the general population to do this, with a larger percentage point difference.

Mobile Gamers Play General Video Games Too

During an average WEEK (MONDAY-SUNDAY), do you...?

■ Mobile Gamers ■ Adults 18+

60%

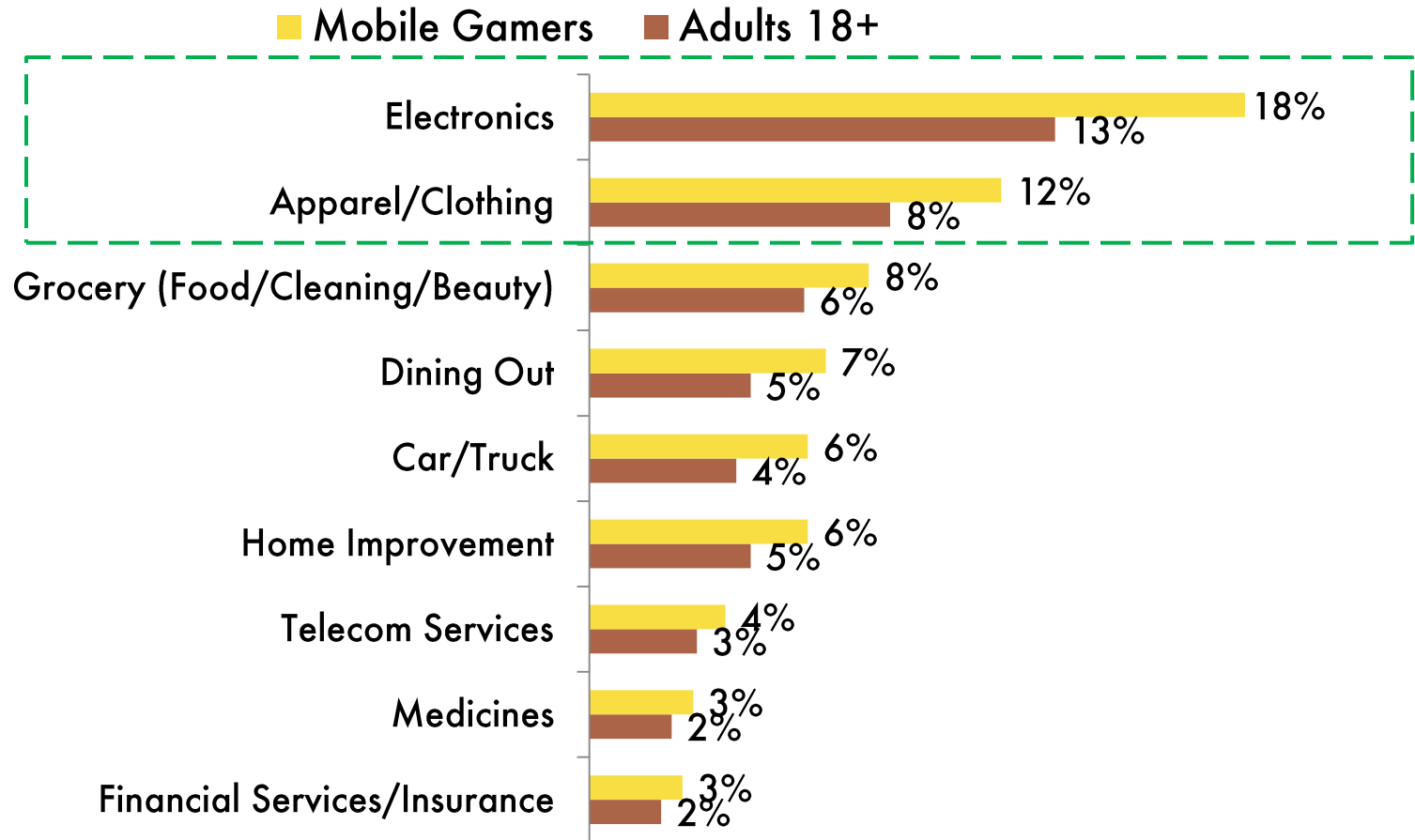
44%

17%
of Mobile Gamers
admit that their
Electronics purchase
decisions are
influenced by
Online Video Game Ads
(vs. 12% of A18+)

Video Gaming

Mobile Gamers' Electronics and Clothing Purchases are More Influenced by Mobile Video Ads

Please tell us if Video on Mobile Devices influences your purchases of the following:

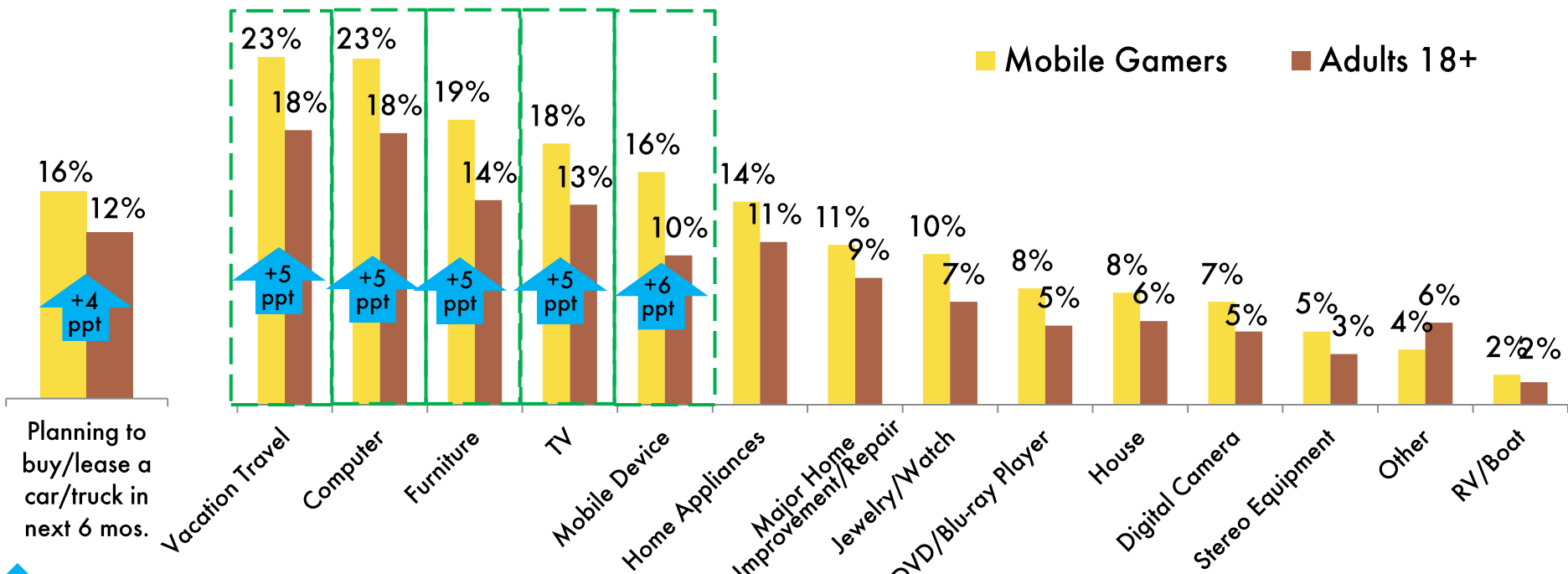


Mobile Gamers are Planning Major Purchases:

- Nearly 1 in 4 plan to buy a new computer or go on vacation
- 16% are planning to buy a car

Planned Big Dollar Purchases

Do you plan to make any of the following major (big dollar) purchases within the next 6 months? (Check all that apply)



Blue Arrows indicate a much larger likelihood (by percentage point difference, +x% ppt) that Mobile Gamers are planning to buy this compared to the general population.

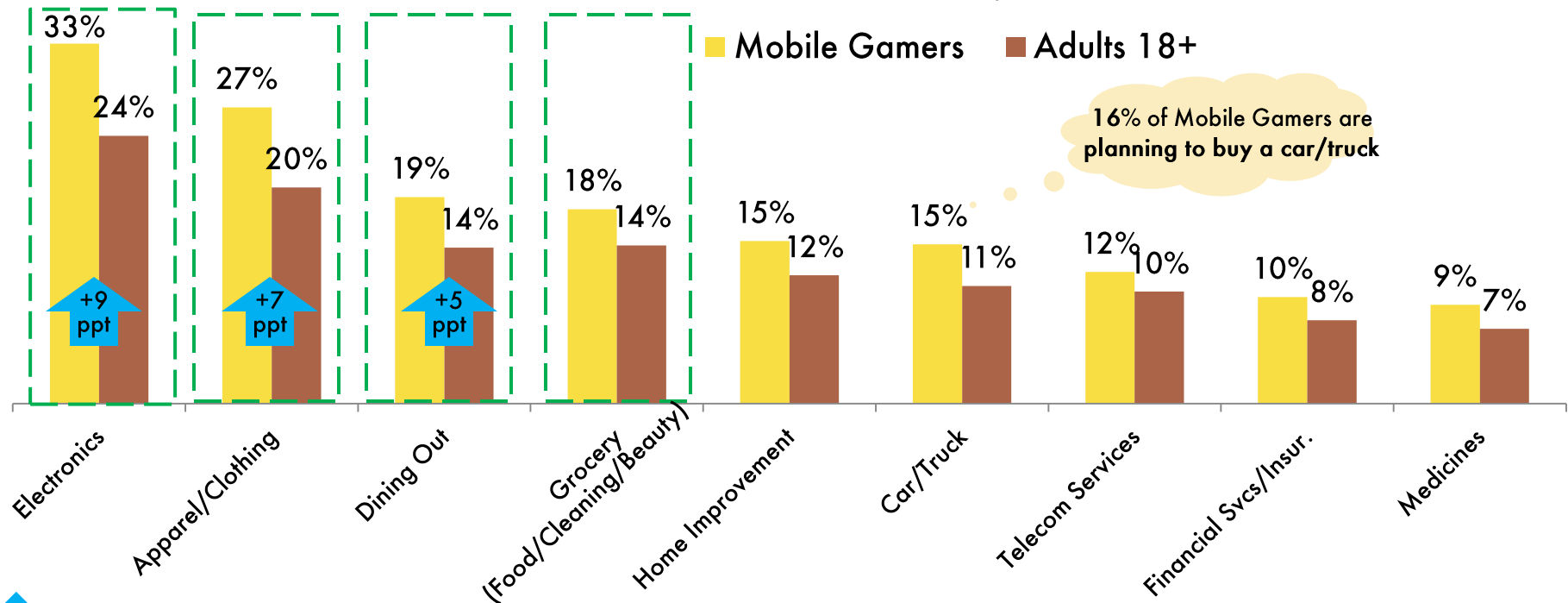
Internet Ads are More Likely to Influence Mobile Gamers' Purchases

Especially Electronics and Clothing

- **Electronics and Clothing are also the top products for which Mobile Gamers do online research, presenting an ideal environment to serve ads**

For each of the following retail categories, please tell us which of the following media influences your purchases. (Please check all that apply): (Internet Advertising)

Influence of Internet Advertising on Purchases



Blue Arrows indicate a much larger likelihood (by percentage point difference, +x% ppt) of Mobile Gamers to be influenced in this purchase than the Gen. Pop. is

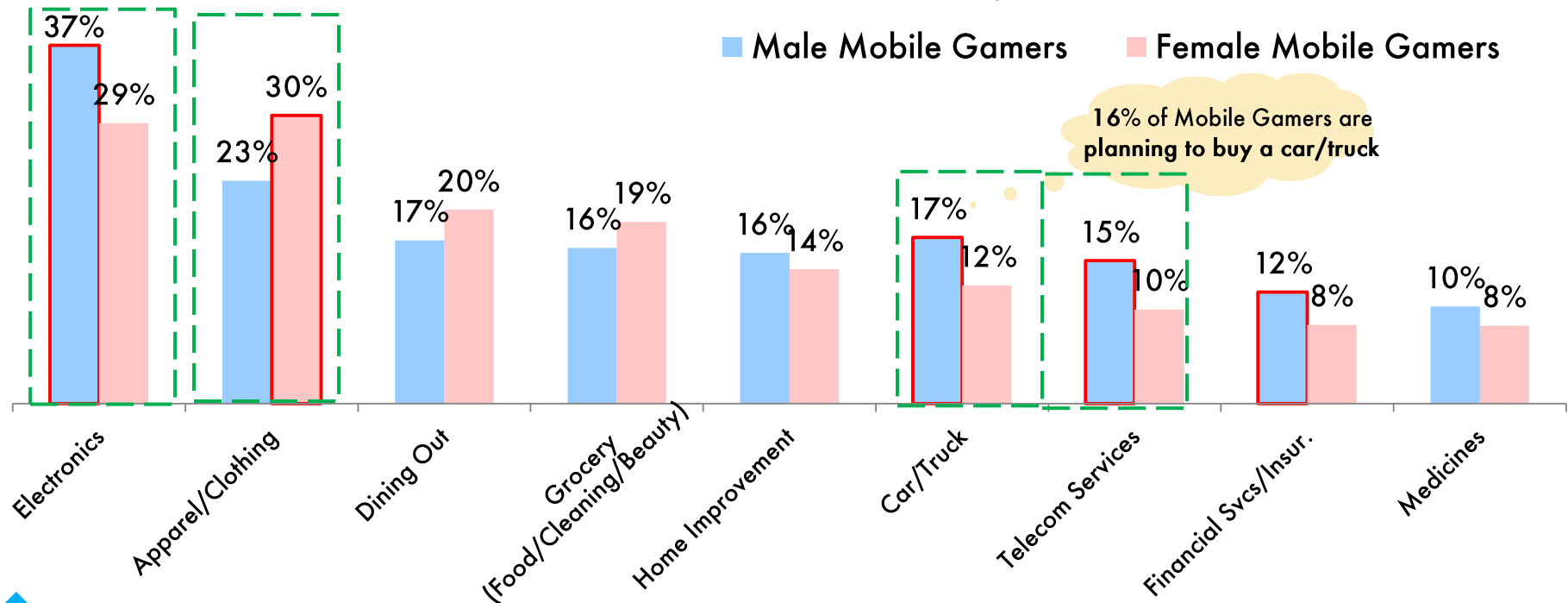
Internet Ads are More Likely to Influence Mobile Gamers' Purchases

Especially Electronics and Clothing

- **Electronics and Clothing are also the top products for which Mobile Gamers do online research, presenting an ideal environment to serve ads**
- **Internet Ads more likely to influence Male Mobile Gamers' Electronics, Auto, Telco, Financial purchases and Female Mobile Gamers' Clothing purchases**

For each of the following retail categories, please tell us which of the following media influences your purchases. (Please check all that apply): (Internet Advertising)

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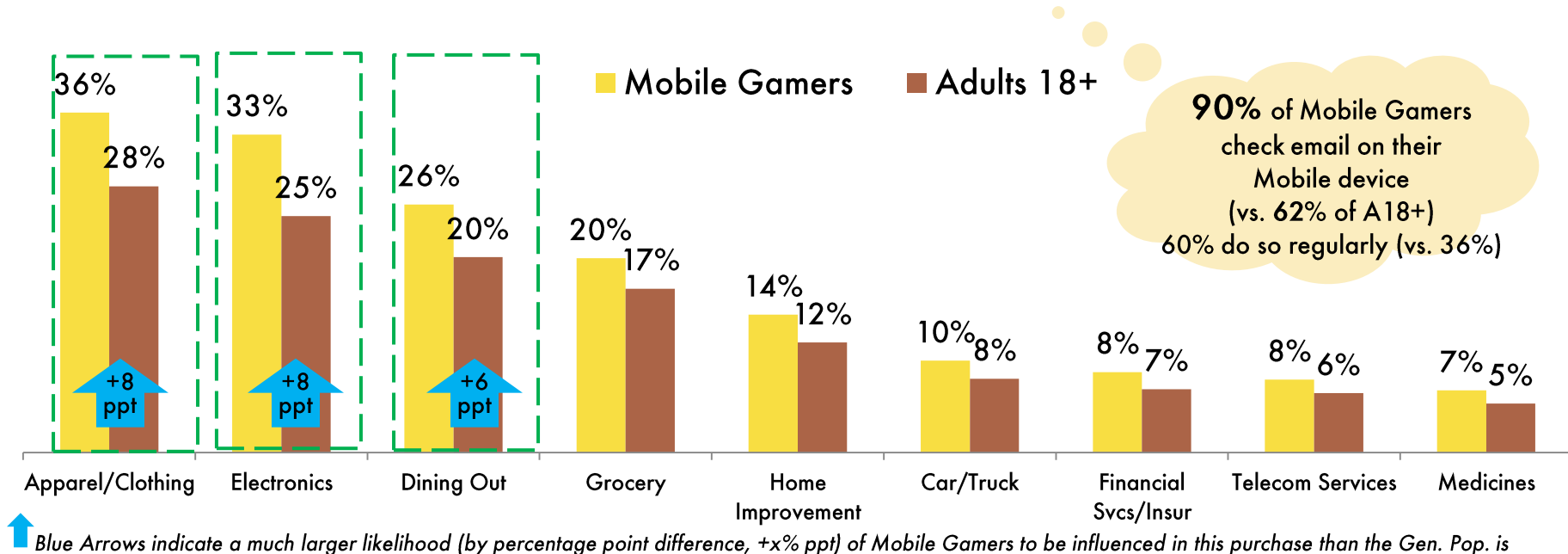
Email Also Influences Mobile Gamers' Purchases

Epecially Clothing, Electronics and Dining Out

- **Mobile Gamers check email on their mobile phones regularly. They also showroom, research and buy from their mobile. Email them to influence their purchases while in the store.**

For each of the following retail categories, please tell us which of the following media influences your purchases.
(Please check all that apply): (Email Advertising)

Influence of Email Advertising on Purchases



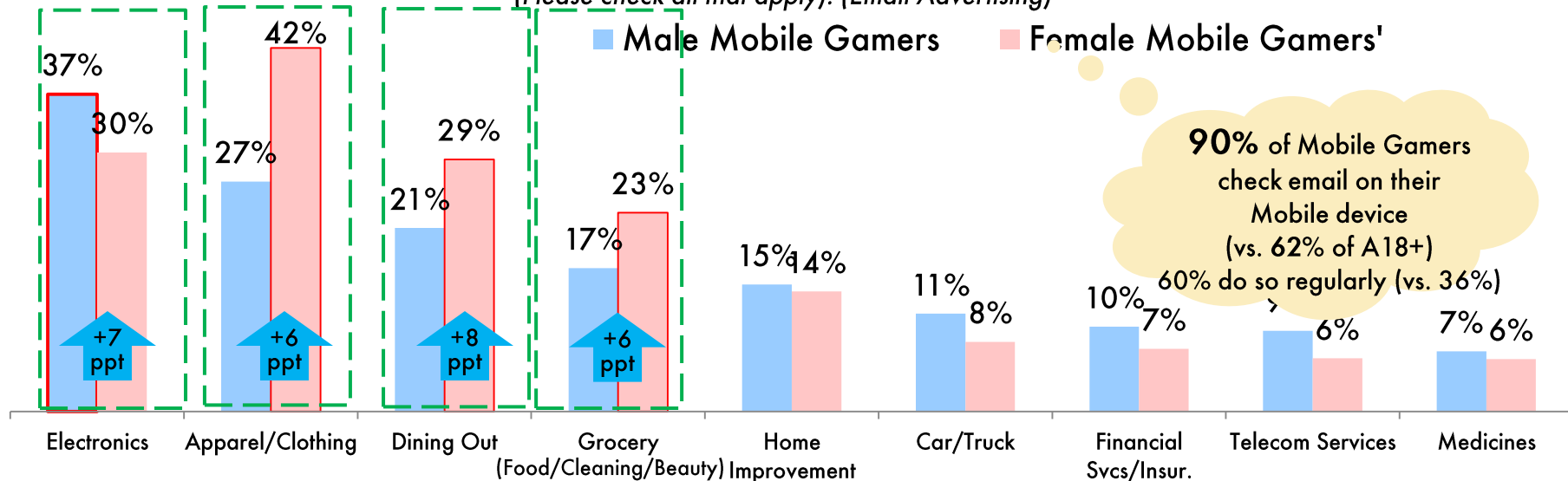
Email Also Influences Mobile Gamers' Purchases

Especially Clothing, Electronics and Dining Out

- **Mobile Gamers check email on their mobile phones regularly. They also showroom, research and buy from their mobile. Email them to influence their purchases while in the store.**
- **Email more likely to influence Male Mobile Gamers' Electronics purchases and Female Mobile Gamers' Clothing, Dining, Grocery purchases.**

Influence of Email Advertising on Purchases

For each of the following retail categories, please tell us which of the following media influences your purchases.
(Please check all that apply): (Email Advertising)



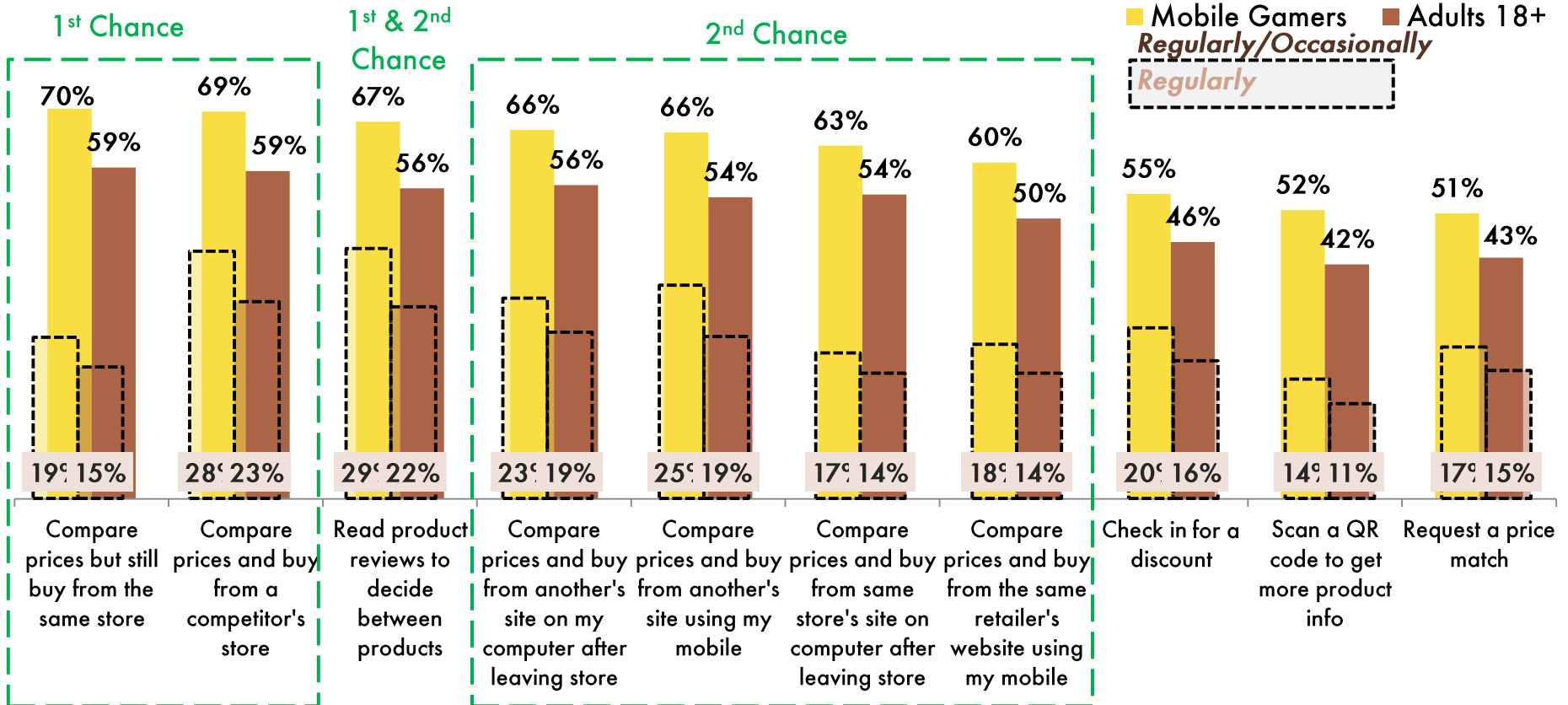
Blue Arrows indicate a much larger likelihood (by percentage point difference, +x% ppt) of Mobile Gamers to be influenced in this purchase than the Gen. Pop. is

Here's How Mobile Influences them while in the Store:

Showrooming and Mobile Shopping

- At least two-thirds of Mobile Gamers check prices or read reviews on their phones while in the store
- Price checking leads them to in-store purchase... yours or your competitors
- This presents an opportunity to serve a mobile ad, email coupon, targeted offer or price guarantee to close the sale – first chance is in-store, second chance is after they leave and buy online

How often do you do any of the following on your smartphone or tablet while shopping in a store?:



Male Mobile Gamers:

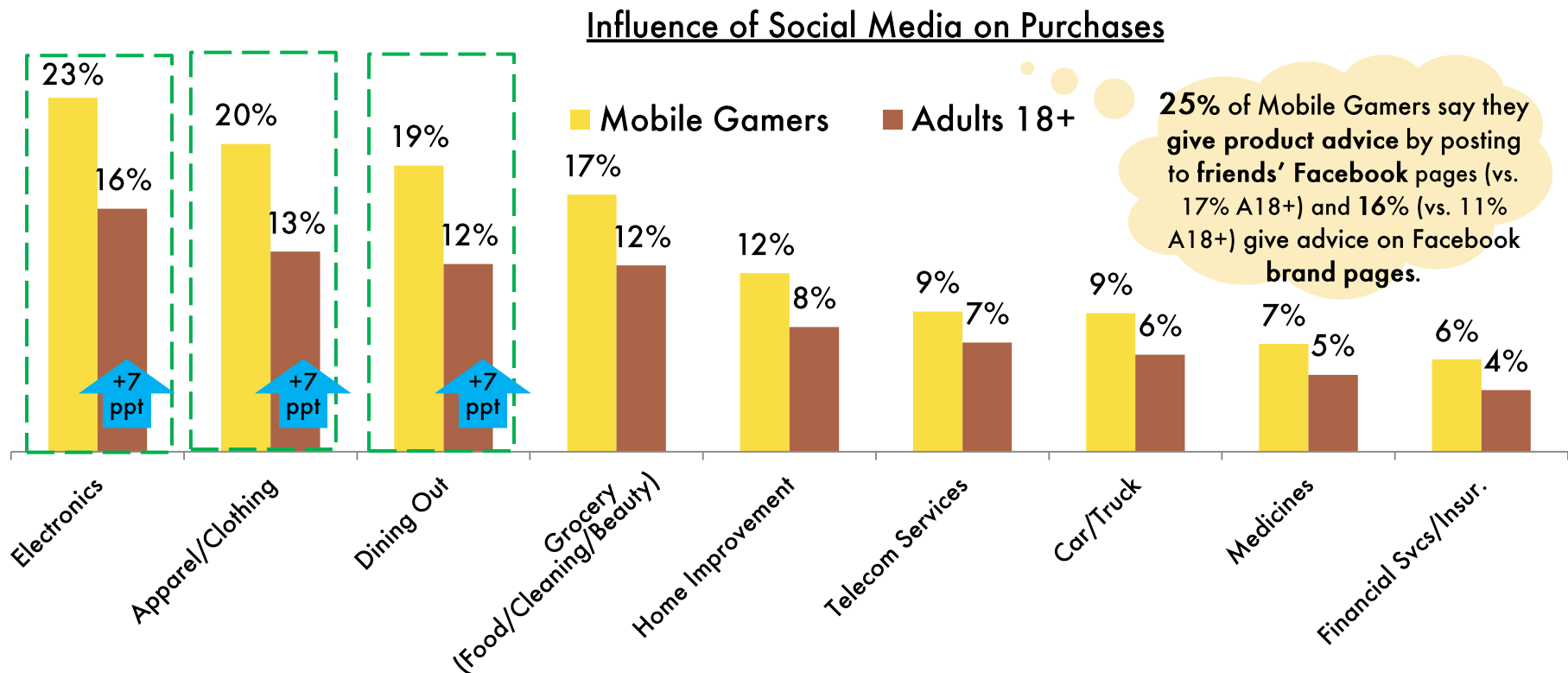
More likely to use mobile to Compare Prices and Buy from Same Store's Site (64%), Request Price Match (55%), Read Reviews (71%), Scan QR (56%)

IAB Mobile Gamers: Who They Are, How They Shop, and How to Reach Them, Sept. 2014

Social Media Influences Mobile Gamers' Purchases

● Especially Electronics, Clothing and Dining Out

For each of the following retail categories, please tell us which of the following media influences your purchases. (Please check all that apply): (Social Media)

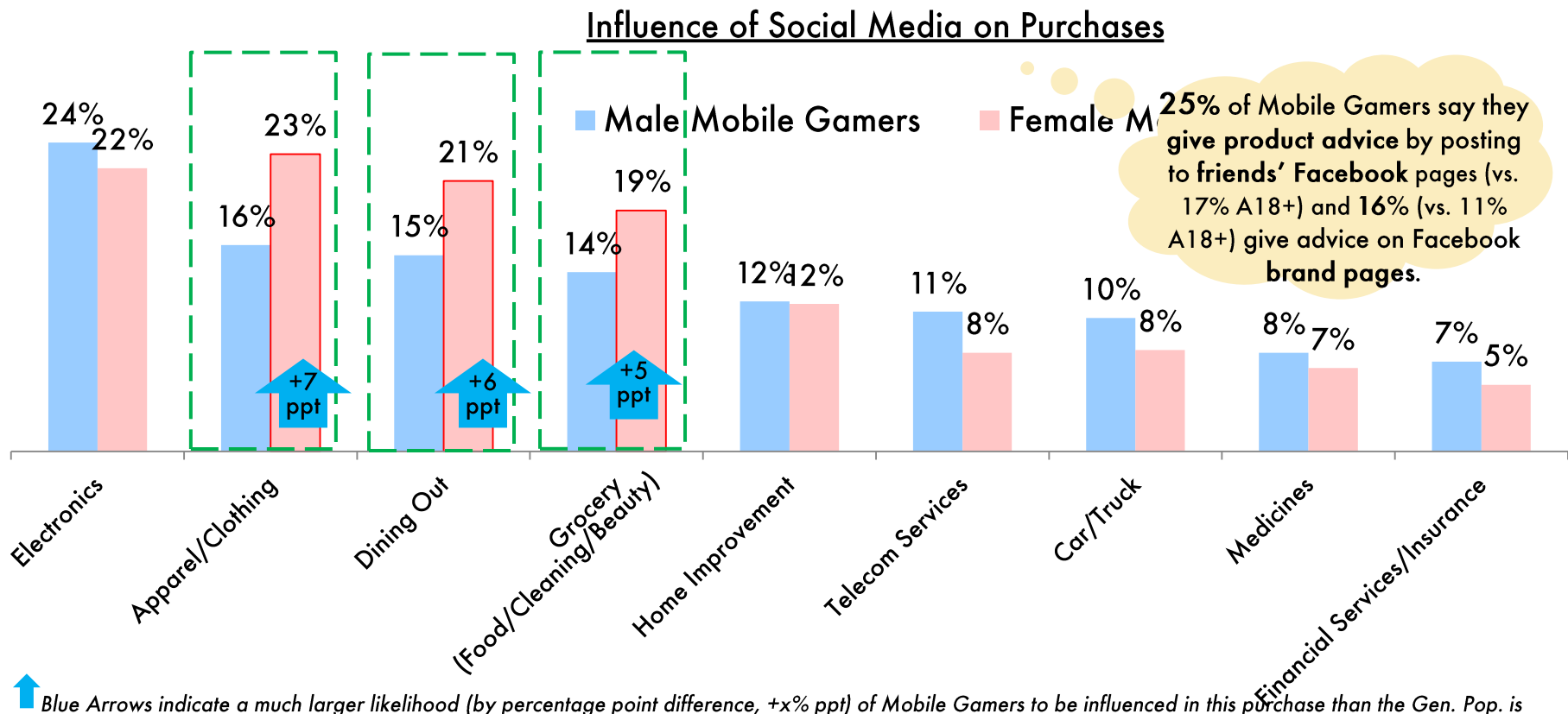


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Social Media Influences Mobile Gamers' Purchases

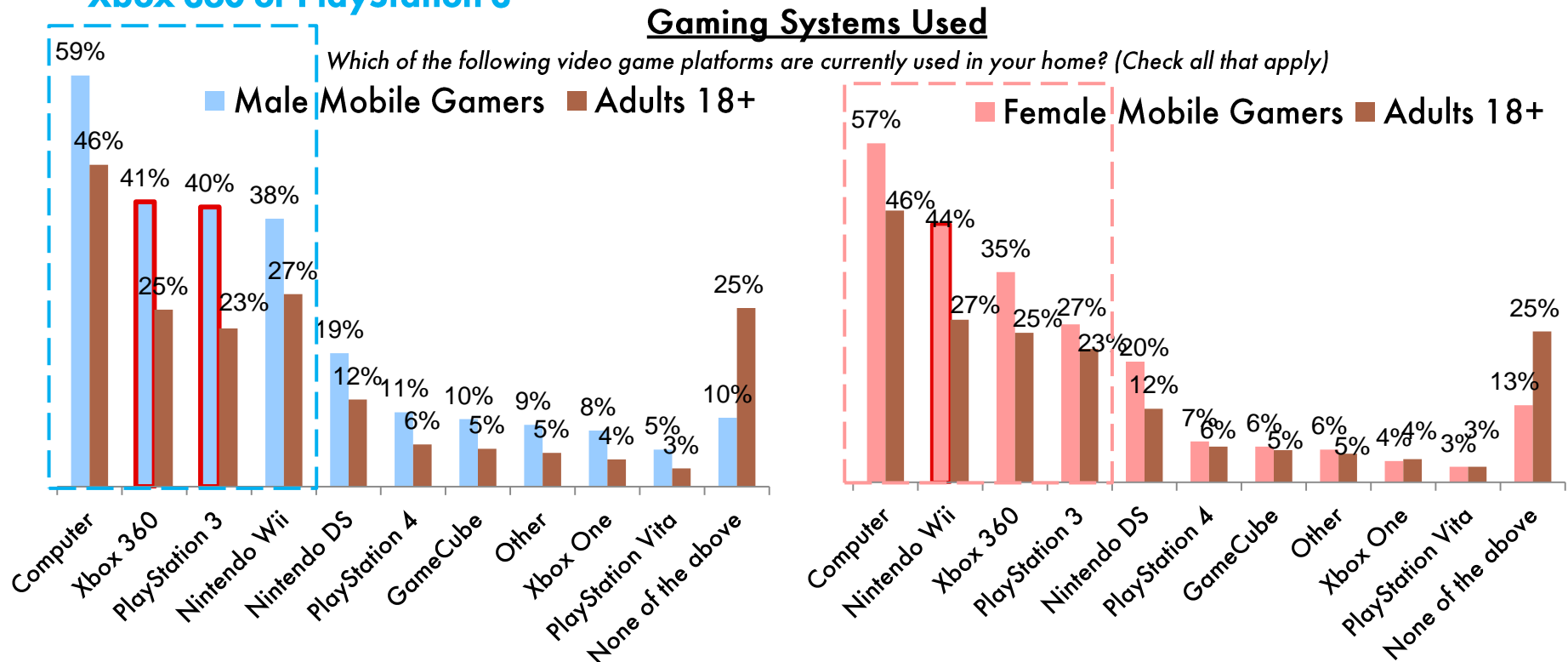
Especially Electronics, Clothing and Dining Out

For each of the following retail categories, please tell us which of the following media influences your purchases. (Please check all that apply): (Social Media)



Video Game Platforms Used by Mobile Gamers

- In addition to their mobile phone, vast majority of Mobile Gamers use their computer for gaming
- Male Mobile Gamers are much more likely to use any gaming system.
- Female Mobile Gamers most likely to use a **Wii**, Male Mobile Gamers most likely to use an **Xbox 360 or PlayStation 3**



Sept. 2014

IAB Mobile Gamers

Who They Are, How They Shop, and
How to Reach Them

Questions?

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