

**MODERN
MOBILE
GAMER**

2022: Dev & UA Edition

**THE MODERN
MOBILE GAMER®**

Presented By

mobilevoice
by Tapjoy

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EXECUTIVE SUMMARY



Since 2017, Tapjoy has surveyed tens of thousands of mobile gamers to get a holistic view of their gaming habits, brand and ad preferences, demographic information, and so much more. This year, we're looking back at that first Modern Mobile Gamer® report to see what's changed, as well as looking to the future.

Mobile developers and publishers, as well as user acquisition marketers, were the focus of Modern Mobile Gamer® 2022: Game Dev Edition. We surveyed over 9,000 mobile gamers on the Tapjoy network to find out what, when, and why they're playing. Let's meet the newest class of mobile gamers.

A lot can change in five years.

For the mobile industry, the last half-decade has been a period of massive growth. Mobile games dominate the video game landscape, generating \$93.2 billion¹ in revenue worldwide in 2021 alone. The mass adoption of mobile devices² means that anyone can be a gamer, and advances in technology have given developers tools to create fun, engaging, and thrilling mobile experiences that can hold their own against the AAA games industry. Where mobile gamers were once considered "casual," it's clear that's no longer the case — they're playing just as frequently as console and PC gamers, exploring a wide variety of genres and getting more and more familiar with the mobile ecosystem.

With this report, we've given a voice to thousands of mobile gamers, from the Gen Z digital natives to internet-savvy Millennials and adaptable Gen Xers, in order to help game developers reach these crucial audiences. It's time to meet the 2022 Modern Mobile Gamer®.

¹[GamesIndustry.biz](https://www.gamesindustry.biz)

²[Statista](https://www.statista.com)

KEY FINDINGS



The frequency at which mobile users are playing has increased: **57% play more mobile games now than they did five years ago**, and nearly half (49%) play multiple times a day.



Whereas just 21% of mobile gamers said they favored ad-supported mobile games in Tapjoy's 2017 survey, **50% of today's mobile gamers say they prefer the ad-supported model** over pay-to-play games or those based primarily on in-app purchases, an increase of 138%.



Gamers like feeling a sense of accomplishment. When it comes to Multi-Reward CPE offers, **64% said they like that the progress bar shows how close they are to earning rewards.**



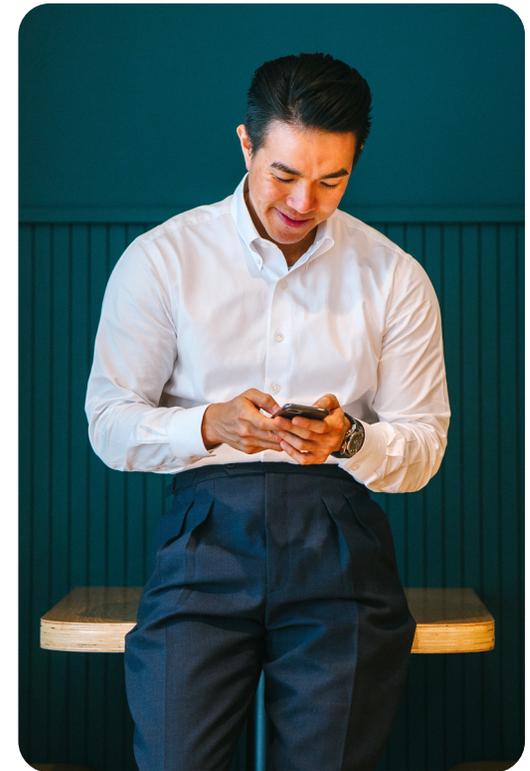
The **puzzle genre has emerged as mobile gamers' favorite**, taking the crown from 2021's top genre, action/adventure. This change was driven by Millennials, Gen X, women, and parents.



The ads are working: 60% said they **discover new mobile games via ads in other mobile games.** The top rewarded ad types are video (53%), surveys (17%), and playables/interactive (16%).



43% of users are open to app tracking on iOS. 39% say they never opt into data tracking. The remaining 18% were not sure. **Top reason to opt in: Trust in the developer/publisher (29%).**



METHODOLOGY



9,352 Respondents

The study's respondents found and completed rewarded MobileVoice® survey offers on the Tapjoy Offerwall.



Opt-in Participation

Respondents reviewed instructional information and opted in to participate in exchange for in-game rewards.



Cohesive Branding

Campaign branding was automatically customized to match each host app's visual style.



Survey Period

Responses were collected and analyzed from multiple surveys launched in February 2022.



Age Verification

All respondents verified that they were 18 years of age or older.



Curated Responses

Responses were filtered to get the most accurate and relevant data. Decimals were rounded to the nearest whole number.



Budget Management

Campaign spend was throttled dynamically based on our goals and requirements.



Geographic Targeting

U.S. targeting was defined by users' device settings at the time the surveys were conducted and confirmed by the respondents.



Virtual Rewards

In exchange for participation, respondents received mobile game rewards or premium content native to each game's virtual economy.



Extensive Reach

The survey campaign was distributed across a variety of popular mobile games in the Tapjoy mobile ad network.

MEET THE 2022 MODERN MOBILE GAMER®

Last year, we did a comprehensive deep dive into four key Modern Mobile Gamer® personas: Generation Z, Millennials, Parents, and Generation X. Over the course of four reports, we found out what makes them tick, how economic and social forces affect their mobile habits, why they play mobile games, and how they interact with ads and their favorite brands.

This year, we're digging further into player motivations and the evolving mobile ecosystem, including how gamers' feelings about the offerwall and rewarded ads have changed in the last five years. Let's meet the 2022 Modern Mobile Gamers!



Aiden, 21

Detroit, MI



Dani, 38

Pittsburgh, PA



Jared, 52

Mount Pleasant, SC

THE DIGITAL NATIVE ZOOMER



Aiden, 21 — Detroit, MI

- Junior at Wayne State University
- Got their first smartphone at age 10
- Fills downtime between classes with mobile games



Mainstream smartphones have existed for more than two-thirds of Aiden's life, so it's no surprise that they grew up with one in their hand. At 21, they can type faster on a touchscreen than on a keyboard, and their phone is never far away. Aiden uses it for everything: group chats with the study group, emails from professors, keeping up with friends and influencers on social media, and — of course — gaming.

Aiden is among the 47% of Generation Z members who play mobile games multiple times a day. They'll open up one of the half-dozen games on their phone when they need to take a break

from a particularly challenging assignment. As a struggling student, Aiden rarely makes in-app purchases, so they turn to rewarded ads to get a little more out of their favorite games.

Favorite mobile games



Jurassic World
Alive



Wizardess
Heart



Color Circles
3D

THE MILLENNIAL MOM



Dani, 38 — Pittsburgh, PA

- Single mother
- Works from home full-time
- Loves mobile games but typically sticks with trusted publishers



With her 40s steadily approaching, Dani has embraced her status as a geriatric Millennial³. During the pandemic, the single mom shifted to remote work that has since been made permanent. She wouldn't have it any other way — cutting out the commute has freed up two hours every day, giving Dani more time to spend with her 10-year-old daughter. During the work day, an app on her phone regularly reminds her to take breaks, which Dani usually spends playing mobile games in quick bursts.

Despite being considered “old” by Gen Z standards, Dani's still quite tech-savvy. She grew up with the internet and was an early smartphone adopter. Her daughter has been begging for a

phone of her own (“But Mom! Everyone else has one!”), but Dani's wary due to the growing concerns she has about data privacy in the mobile ecosystem. She still plays mobile games just about every day, but she only shares tracking data with app publishers and brands she trusts. She's also become a frequent app shopper ever since she realized how convenient it was to get great deals while playing games.

Favorite mobile games



Crosswords with Friends



Carpet Clean Simulation



Kim Kardashian Hollywood

³[Today](#)

THE EMPTY-NESTER GEN XER



Jared, 52 — Mount Pleasant, SC

- Married father of three
- Youngest child recently left for college, making him and his wife empty nesters
- Plays mobile games with his wife and adult children to keep in touch



Jared still doesn't know when he got so old. It seems like just yesterday the media was calling Gen Xers "latchkey kids" and "the MTV generation," but now he finds himself in his 50s with three grown children, the youngest of whom just left for college. The house he and his wife have lived in for decades suddenly feels very empty, and Jared finds himself relying on his smartphone to keep up with his kids. He even joined TikTok to follow his daughter's feed!

Video games were always present in Jared's house, but since the consoles moved out with the kids, he's taken a liking to mobile games. He was delighted to find that some of his old retro favorites have mobile versions,

and he's become an even bigger fan of strategy games. In fact, he regularly challenges his wife and kids, and mobile games have become a way for them all to keep in touch. Though he usually downloads free-to-play mobile games, it's not unusual for him to make in-game purchases. After all, what's a few bucks for a game that offers countless hours of fun and family time?

Favorite mobile games



Carpet Clean Simulation



Wordscapes



Daily Themed Crossword

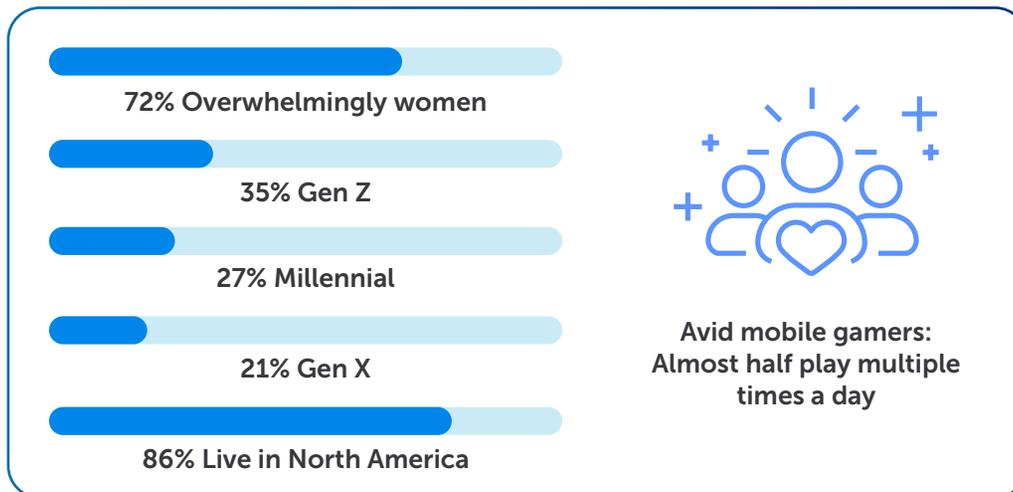
GAME ON!

For mobile game makers, the key to success is understanding why people play mobile games. As it turns out, the answer is pretty simple: They want to be entertained! Nearly three-quarters of respondents (73%) cited “entertainment” as a reason for playing mobile games, with “relaxation” coming in second at 60%. In this way, mobile games aren’t so different from console and PC games.

Of course, once you start digging beneath the surface, there’s so much more to learn about the mobile habits of modern gamers.

Mobile Gamers on the Tapjoy Network

Who are the mobile gamers on the Tapjoy network? According to our most recent surveys, our gamers are...



⁴Tapjoy ⁵Statista



WHEN THEY'RE PLAYING



49% of all respondents reported playing mobile games multiple times a day.

- At 58%, parents are the most likely to play multiple times a day
- Gen X is a close second with 54% of respondents choosing this frequency



50% of gamers play over 10 hours a week⁴. That puts the frequency of mobile gameplay on par with overall gaming habits⁵.

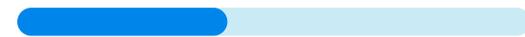
The most popular times to play mobile games are...



47% On breaks from work or school



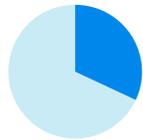
44% Evening or right before bed



38% After getting home from work or school

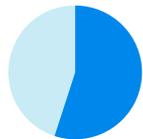


WHAT THEY'RE PLAYING



35% of those surveyed have between 4-7 mobile games on their phones

- 34% of Gen Z have 8+ games on their phones



Puzzle (55%)

- Puzzle is the top genre in every age group, most loved by Gen X (65%) and parents (58%)



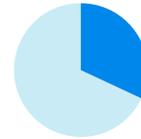
Action/Adventure (33%)

- This genre is more popular among men (48%) than puzzle (37%)
- It's also a very close second for Gen Z (45% enjoy action/adventure apps, while 46% like puzzle games)



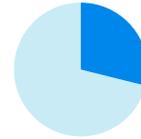
Strategy (33%)

- Especially popular among Gen X (37%)



Simulation (33%)

- Gen Z, Millennials, and women are particular fans of this genre

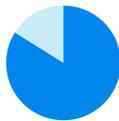


Role-playing (30%)

- Gen Z and non-binary gamers are the biggest RPG fans (41%)



WHY THEY'RE PLAYING



84% play mobile games, compared to 36% who play console/handheld games and 30% who play on PC

- When asked why they prefer mobile games to other platforms, 67% cited the convenience: "I always have my phone on me"



57% say they play more mobile games now than they did five years ago

- 22% feel that mobile games have increased in quality in that time period
- 19% play more genres than they used to
- 20% began interacting with rewarded ads since 2017



Top reasons to remove mobile games from regular rotation:

- Boredom/frustration (39%)
- Finished story/missions (24%)
- Publisher stops adding content (12%)



60% discover new mobile games through ads in other mobile games

- 39% play new games if their friends are playing



ARE THEY SPENDING?



48% of parents report making occasional purchases, compared to 40% who never make purchases



More Gen Xers make occasional purchases (45%) than never make purchases (40%)



Millennials are split: 44% never make purchases in FTP games, but 44% make occasional purchases



TOP REASONS TO MAKE IN-APP PURCHASES IN MOBILE GAMES



Lack of time to earn rewards (27%)



Small price to pay for hours of entertainment (27%)



To reward developers/publishers (15%)



TRACKING SENTIMENT



43% are open to app tracking



39% say they never opt into data tracking on iOS



The remaining 18% were not sure.



Top reason to opt in: Trust in the developer/publisher (29%)



46% say they download free-to-play games and never make purchases, but 41% say they download FTP games and occasionally make purchases



26% of respondents wait months before making an in-game purchase



Parents are the quickest to make IAP: 27% only wait a few days

The Privacy Conundrum

One of the biggest concerns of modern consumers is data privacy. Mobile users want to know who is tracking their preferences and mobile habits and how that data is being used. With Google's intention to get rid of third-party cookies⁶ and Apple's significant IDFA changes⁷, it's clear that publishers face new challenges when it comes to data collection.

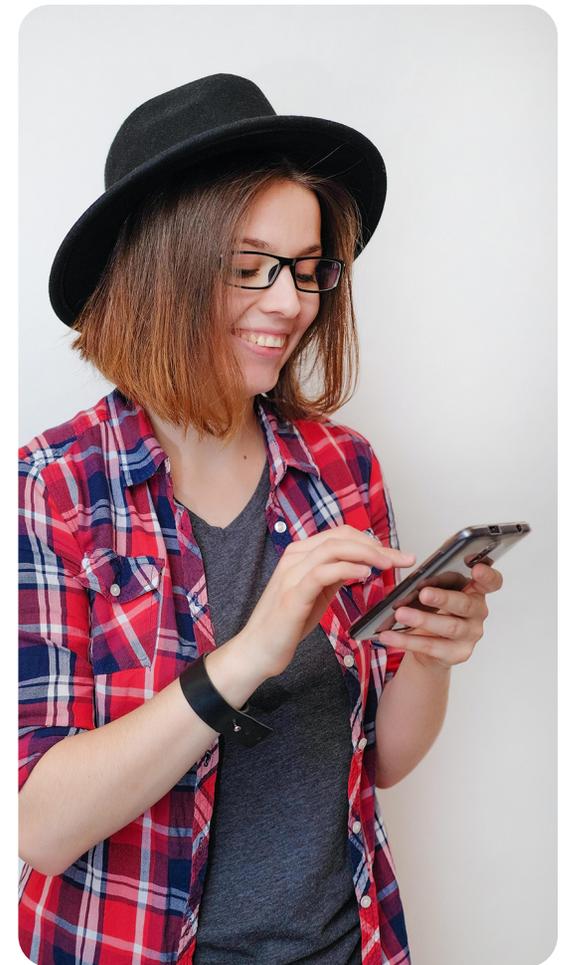
⁶Vox/Recode

⁷Mobile Marketing Magazine

THROWBACK! MODERN MOBILE GAMER® THEN VS. NOW

This year marks the fifth anniversary of the Modern Mobile Gamer® series. To celebrate this significant landmark, we took a look back at our very first report to see how players' perception of the mobile ecosystem has changed.

THEN	NOW
 <p>21% of mobile gamers said they favored ad-supported mobile games in Tapjoy's 2017 survey. 55% of users preferred free apps with in-app purchases.</p>	 <p>With a better understanding of how the mobile ecosystem works, 50% of respondents said they prefer the ad-supported FTP model; only 9% prefer paid apps.</p>
 <p>63% said video ads were their favorite rewarded ad type; app installation rewards were a distant second at 10%.</p>	 <p>Video still reigns supreme at 53%, but support for survey ads (8% to 17%) and playables (9% to 16%) has greatly increased, making them the next most popular choices.</p>
 <p>44% of respondents said humor in video ads was most likely to get their attention.</p>	 <p>The need for humor has only grown — 57% said they're most likely to interact with funny videos. Storytelling and product demonstrations have also increased in importance.</p>



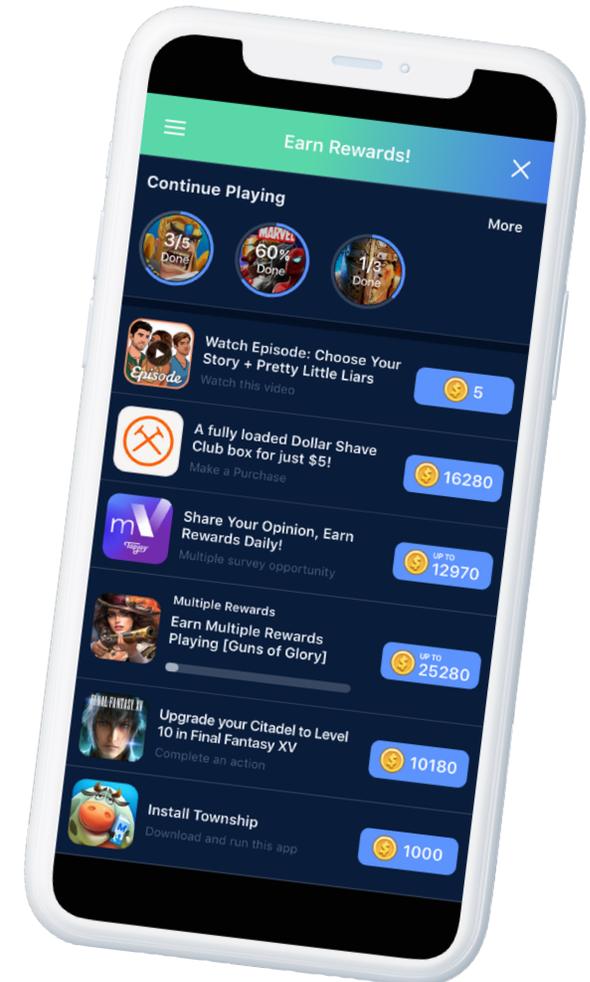


The Evolution of the Tapjoy Offerwall

Originally introduced in 2006, the Tapjoy Offerwall is continually evolving to meet the needs of mobile publishers, advertisers, and gamers. Since our first Modern Mobile Gamer® report, we've added some significant features. We asked mobile gamers how they felt about these key product developments.

Multi-Reward Offers & Progress Bar

As the research reveals, users are largely satisfied with the Multi-Reward format and UI. The growth numbers associated with the format underscore the findings.



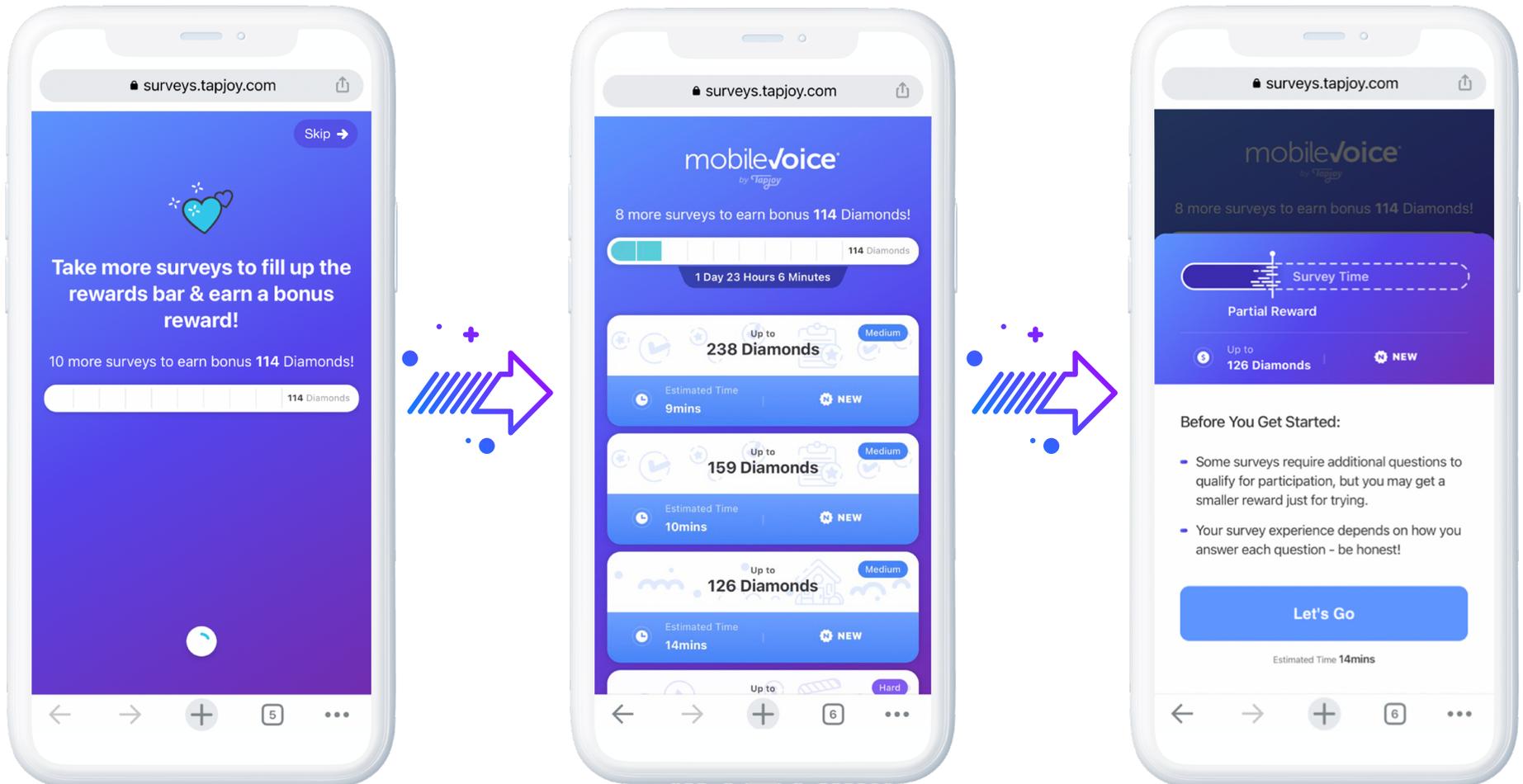
<p>55% of mobile gamers favor offerwalls with Multi-Reward offers.</p>	<p>The progress bar is particularly popular — 64% say they like seeing how close they are to earning rewards.</p>	<p>Multi-Reward saw 420% growth in ad spend in its first year of launch. Over that same period, publisher earnings from the format grew by 5X.</p>
<p>Huuuge Games invested in Multi-Reward for user acquisition and saw an 81% increase in offer initializations. After a year of these campaigns an average of 8.6% D7 ROAD and 17.7% D30 ROAS across five different apps.</p>		<p>Thanks to the presence of Multi-Reward offers, Fanmaum sees a \$342 eCPM on Android.</p>

MOBILEVOICE®

Network of 50 million consumers in 200+ countries

Surveys are one of the fastest-growing categories on the Tapjoy network; 34% of survey respondents said it's the rewarded ad type they're most likely to engage with.

Game developer [IGG](#) used MobileVoice® to ask over 1,200 mobile gamers what story themes they'd prefer to see in their game's next release.





CPA & TAPJOY SHOPPING



CPA represents almost 70% of publisher earnings on iOS and 29% use the offerwall to discover and shop for new products



Advertiser **Manscaped** used CPA ads to drive over 100K first time purchases



LovelyWholesale, a retail app advertiser, used CPA ads to acquire over 30K new users



TAPJOY SHOPPING SENTIMENT

38% have noticed the addition of the Shopping tab on the Tapjoy

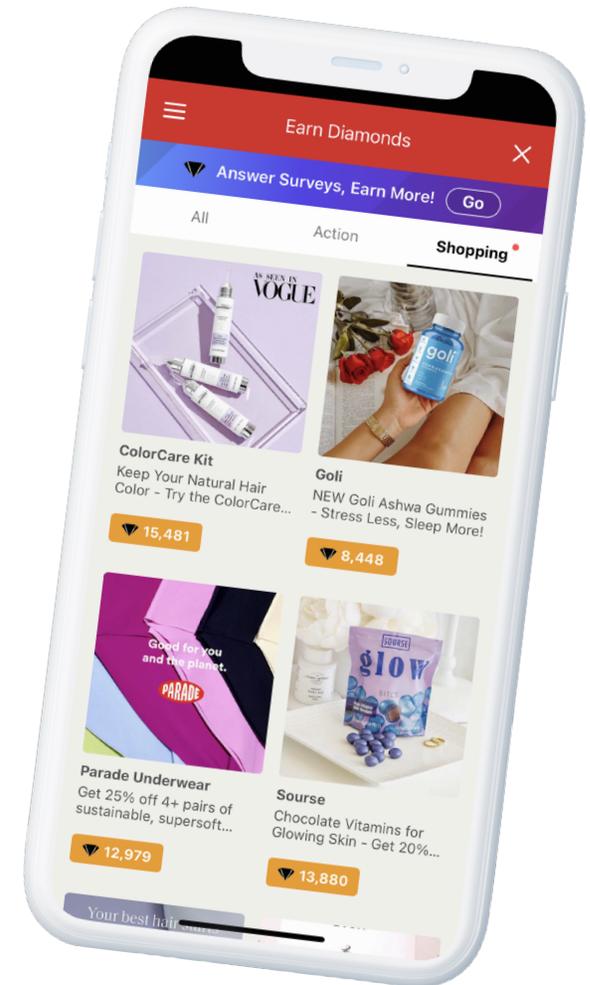
21% think it's great for discovering new brands

26% enjoy getting rewarded for making purchases they would have made anyway

29% use the offerwall to discover and shop for new products

23% have browsed offers

70% of publisher earnings on iOS are represented by CPA



THE MODERN MOBILE GAMER® **CONCLUSION**

Don't underestimate mobile gamers. They know what they like, they understand the mobile ecosystem, and they're just as into their favorites as console and PC gamers are. By now, it's clear that the "casual" label is inaccurate:

Want to know more about the Modern Mobile Gamer®? Check out our 2021 reports featuring Gen Z, Millennials, Gen X, and parents.

57%

play more mobile games than they did five years ago

49%

play multiple times a day; Parents, Gen X, and women are the most likely to play at this frequency

60%

discover new games via mobile game ads

50%

prefer ad-supported games to paid and freemium mobile games

**CONNECT WITH
MORE THAN
1.6 BILLION
MOBILE
CONSUMERS**

Discover the Monetization Potential of the Tapjoy Offerwall

With unparalleled eCPMs and an engaging opt-in model, the Tapjoy Offerwall is the ideal way to monetize mobile gamers without relying on in-app purchases. Offerwalls allow users to browse rewarded offers, choose which ones to engage with, and complete them in exchange for virtual rewards like in-game currency. Our own data shows that 70% of mobile gamers say they love rewarded ads, and 47% say rewarded ads are their preferred way to get virtual currency. On top of that, rewarded ads get results: 43% of users surveyed reported purchasing something they'd seen in one.

Ready to learn more? Get in touch today to connect with one of our mobile strategists and find out how offerwalls drive revenue, retention, and a positive user experience.

CONTACT US