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DISSECTING THE MOBILE GAMING AUDIENCE:

UNCOVER THE HIDDEN OPPORTUNITY FOR BRAND MARKETERS

WHAT YOU NEED TO KNOW ABOUT THE MOBILE GAMER

Mobile gaming is no longer a niche industry, it's truly mainstream entertainment. In the U.S. alone, over half the population is now gaming on-the-go with no signs of slowing. What's a little less known is this audience is broad and highly engaged with significant disposable income.

With over 300,000 integrated apps and a reach of over 800M monthly active players, Chartboost is the leading mobile game audience marketplace with direct access to this surging segment of the mobile population. In this report, we analyzed a sample of over 64M devices from the Chartboost network in US across Google Play and iOS. Partnering with Tapfwd and Newzoo, we've gathered the key persona data to help you successfully access this audience.

KEY HIGHLIGHTS

Mobile games in the US are reaching a **bigger daily audience** than prime time viewers on **ABC, CBS** and **NBC**

see more>

The mobile gaming audience is broad: **62% female** and mainly over **25 years old**

see more>

47% of mobile gamers **shop online** over 3 hours per week compared to 28% of non-gamers

see more>

MOBILE GAMES **HAVE REACH**

In the mobile world, the reach of games is growing exponentially. In 2016, 69 percent of mobile phone owners in the US play a game at least once per month and this is expected to grow to 77 percent by 2020.[1]

Games are also dominating all apps across GooglePlay and the iOS App Store. In March 2017, Games represented over 25 percent of all active apps - the largest category followed by Business apps at 9.88 percent.[2]

Mobile games are reaching unprecedented scale, often larger than well established channels for brands. Take a traditional channel such as television, where the top four US ad-supported tv networks are losing their edge to the reach of mobile games in the US.

US MOBILE PHONE OWNERS WHO GAME AT LEAST ONCE A MONTH

69%	75%	77%
2016	2018	2020

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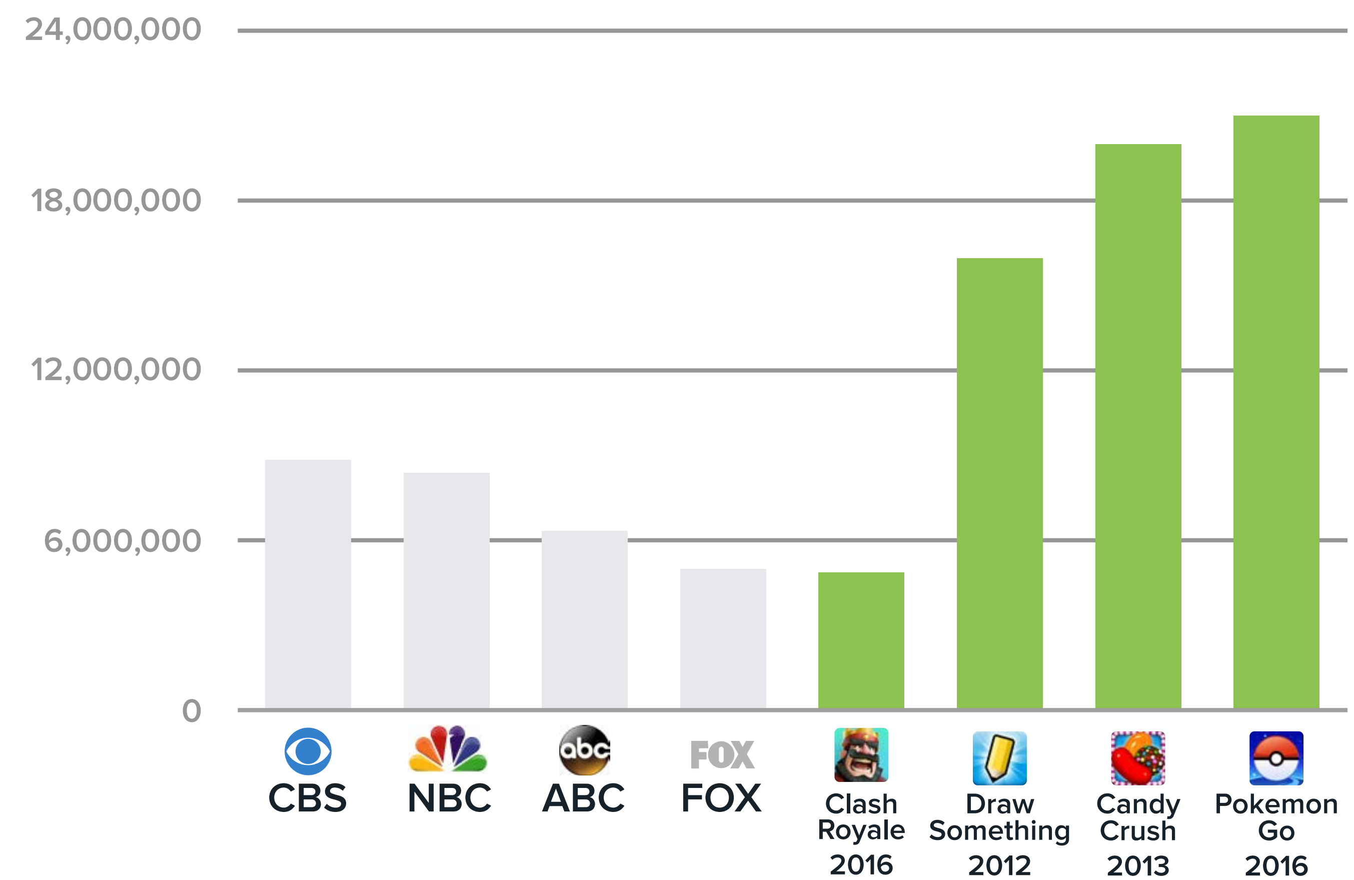
TOP US AD-SUPPORTED TV NETWORKS VS. TOP US MOBILE GAMES 2016[3]

DAILY AVERAGE PRIME TIME VIEWS VS. DAILY PEAK ACTIVE USERS



SOURCES:
eMarketer Aug 2016 (1), Statista (2), Indiewire, CNBC, Superdata (3)

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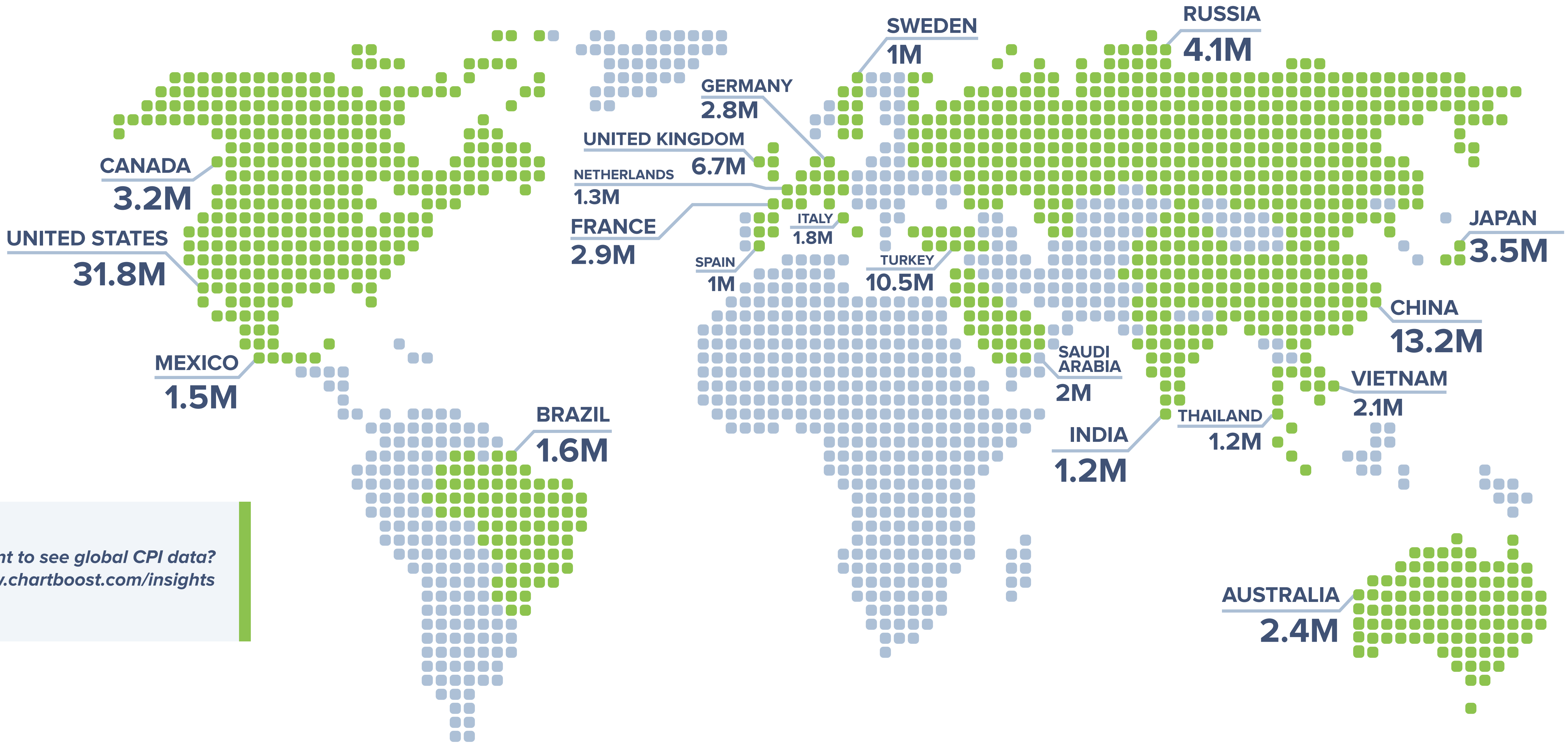
MOBILE GAMERS **ARE GLOBAL**

While the US and China have led in scale and revenue, there are 2.1B mobile gamers worldwide with emerging geographies quickly gaining traction.[1] It's a massive opportunity for global brands.

The iOS Appstore, though seeing half of the downloads compared to GooglePlay, attracts the biggest mobile spenders and generates twice as much revenue as its Android rival.[2]

TOP 20 COUNTRIES BY MONTHLY UNIQUES FROM CHARTBOOST PUBLISHING APPS - iOS

*UNIQUE USERS THAT HAVE SEEN A CHARTBOOST AD IN MARCH 2017 ON IOS



Want to see global CPI data?
Visit www.chartboost.com/insights

SOURCES:
Newzoo 2017 Global Games Market Report(1), Apple Insider(2)

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MOBILE GAMERS **ARE GLOBAL**

As mobile phone adoption becomes more pervasive in emerging markets, gaming will be a key driver of device engagement.

Brazil, Russia, and India show the most growth this year and will likely continue especially as Android dominates these markets.

TOP 20 COUNTRIES BY MONTHLY UNIQUES FROM CHARTBOOST PUBLISHING APPS - GOOGLE PLAY

*UNIQUE USERS THAT HAVE SEEN A CHARTBOOST AD IN MARCH 2017 ON GOOGLE PLAY

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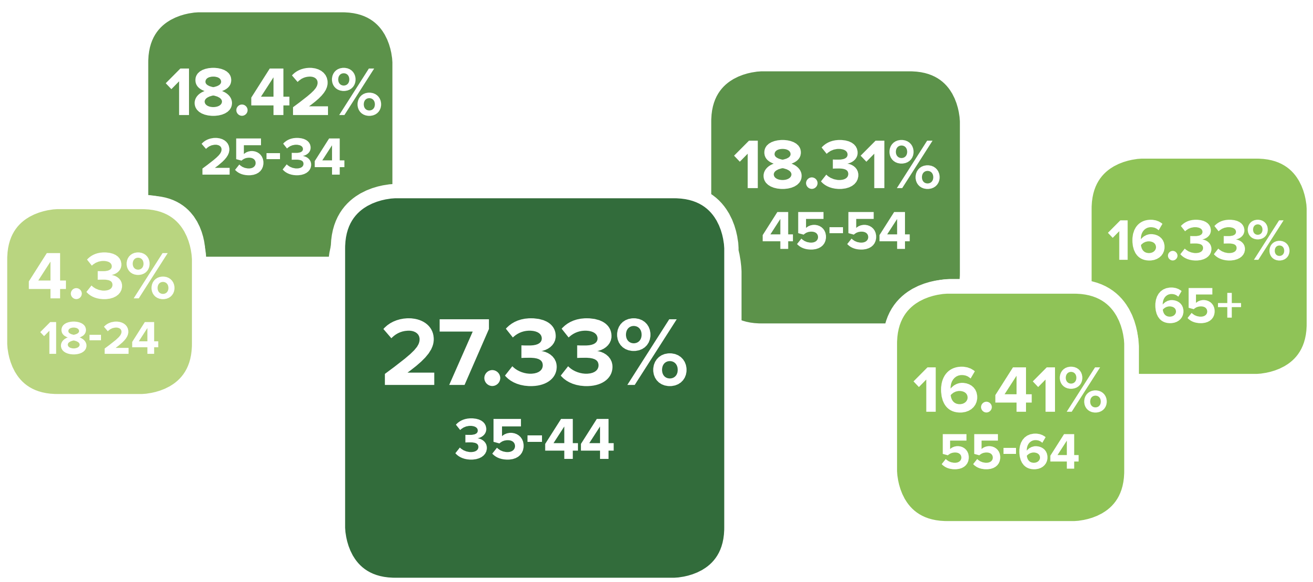
MOBILE GAMES CAPTURE A **BROAD AUDIENCE**

Today's mobile gaming persona is diverse, **mostly female, and between 35 and 44 years old.** The explosion of casual mobile game genres like puzzle and casino have significantly shifted the makeup of the gamer audience. The new typical mobile gamer is likely in a family household and across a spectrum of professional levels.

AGE - ADULT 18+



GENDER

FAMILY DEMOGRAPHICS

Over **66%** of mobile gamers have **1 or more children** in their household

PROFESSIONAL LEVEL

BOARD & OWNERSHIP	3.67%
EXECUTIVE	10.95%
MANAGEMENT	19.97%
NON-MANAGEMENT	65.42%

SOURCES:
Chartboost and TapFwd analyzed 64,289,417 devices from the Chartboost network in the US across iOS and Google Play platforms

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MOBILE GAMES CAPTURE A **LUCRATIVE AUDIENCE**

Today's mobile gamer is a **highly lucrative audience with disposable income to spend.** The majority of this segment is earning $50,000 and above, with 42 percent $30-50k of discretionary annual spending.

So it's not surprising that in mobile gamers are also big spenders in-game. In 2016, game apps generated over 50 billion dollars in revenue compared to the 11.5 billion from non-game apps.[1]

An added value to this audience is that they are highly engaged, with over 40 percent D1 and 20 percent D7 retention in most cases. This offers multiple opportunities for marketers to reach an individual player while creating a positive association with the brand.

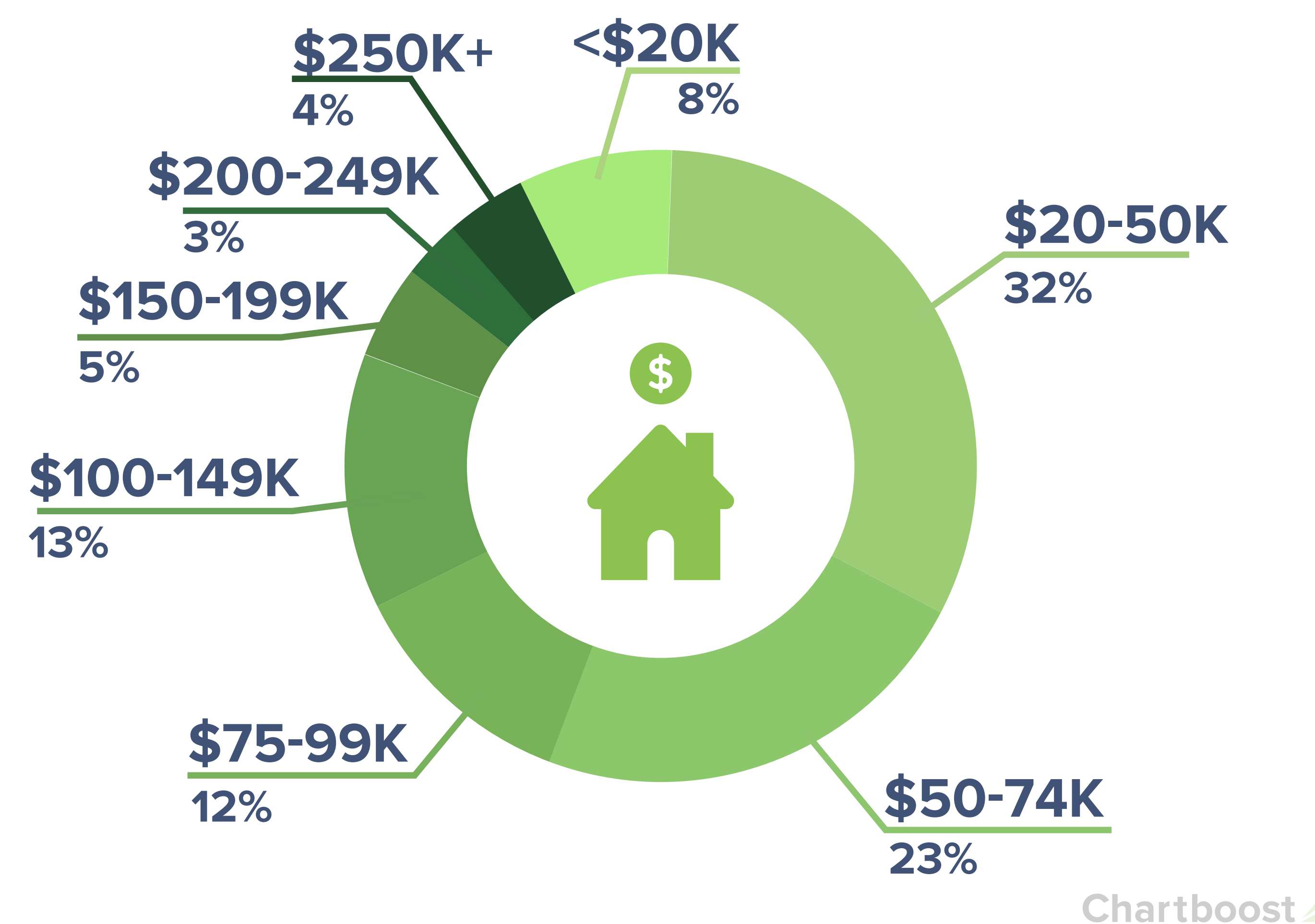
DISCRETIONARY INCOME*

30% have $15-30K
annual discretionary income

42% have $30-50K
annual discretionary income

Disposable income after taxes (income tax) and necessary expenditure (food, clothes and shelter)

HOUSEHOLD INCOME



CREDIT RATING

EXCELLENT	49%	GOOD	27%
FAIR	11%	POOR	13%

SOURCES:
Statista(1), Data analysis of 64,289,417 devices from the Chartboost network in the US across iOS and Google Play platforms

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MOBILE GAMERS ARE **BIG SPENDERS**

Outside of in-game spending, the mobile gaming audience is **shopping more online and highly engaged on mobile** for most content consumption over non-gamers. They are more likely to be paying customers to digital services and spend significantly on apparel, travel, and dining.

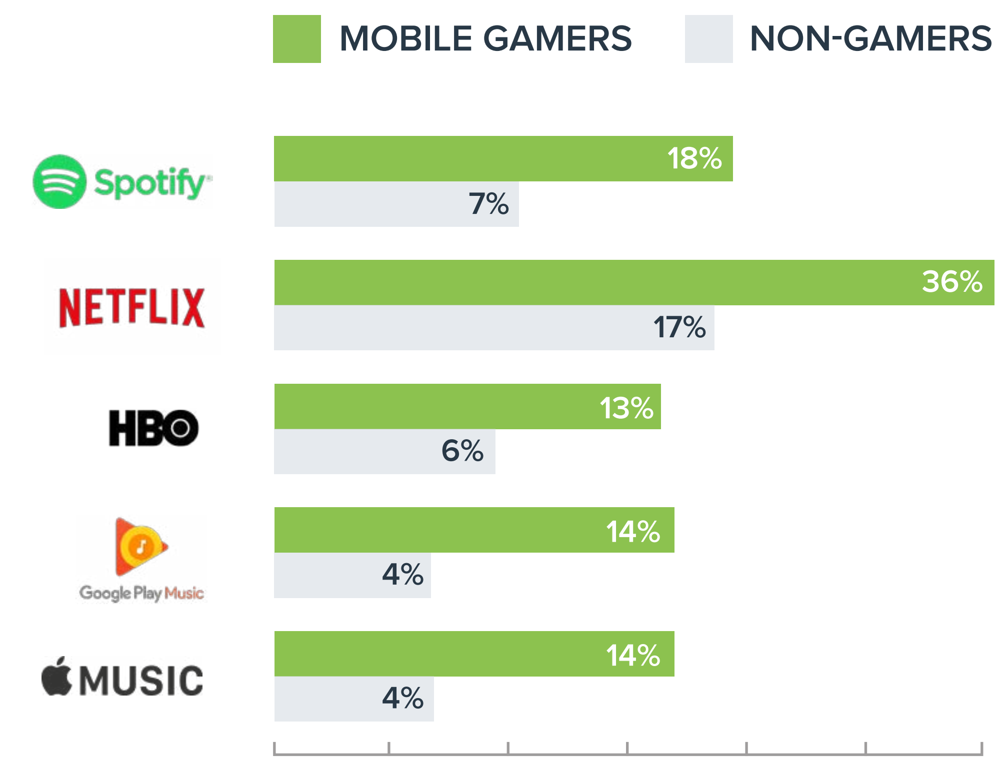
COMMON DISCRETIONARY SPEND PER CATEGORY

PERSONAL CARE	$1,000-$1,499
EDUCATION	$1,500-$5,499
APPAREL	$3,000-$4,999
TRAVEL	$4,000-$4,999
FURNISHINGS	$3,000-$4,999
DINING	$4,000-$4,999
ENTERTAINMENT	$1,750-$3,499

SOURCE:
Data analysis of 64,289,417 devices from the Chartboost network in the US across iOS and Google Play platforms

GAMERS VS. NON-GAMERS DIGITAL SUBSCRIPTIONS

WE SURVEYED “ARE YOU CURRENTLY SUBSCRIBED TO THESE SERVICES?”



GAMERS ARE BIG ONLINE SHOPPERS

47 percent of gamers spend 3+ hours per week shopping online over 28 percent of non-gamers

GAMERS ARE EXTRA ENGAGED ON MOBILE

On average, gamers spend **20 percent more** time on their mobile device shopping, listening to music, watching TV or videos, and reading over non-gamers

SOURCE:
Newzoo global field study, March 2017

CONCLUSION

While each brand measures the effectiveness of its campaign differently, there are two main metrics of success that matter: quality and scale.

In this report, we've seen how the popularity of gaming apps and the value of their audiences continue to grow every year. The mobile gaming audience is highly engaged and with high spend potential. Mobile gaming is an opportunity for brands to connect with advantageous customers in a moment of maximum engagement.

On the other side of the fence, publishers are seeking direct access to brands. Game developers are eager to boost their revenues aligned with relevant brands. For both brand marketers and game developers, Chartboost powers the right engagement at the right time with the right audience.

With Chartboost, reach over 800M monthly active players in over 300,000 mobiles games in our leading mobile audience marketplace.

READY TO ENGAGE WITH THE MOBILE GAMING AUDIENCE?

Email us at advertisers@chartboost.com

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