

# MOBILE GAMERS IN CHINA

A survey of Chinese mobile gamers' behaviour  
and attitudes towards mobile gaming



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## FOREWORD

### **Mobile gamers in China: A survey of Chinese mobile gamers' behaviour and attitudes towards mobile gaming**

The Chinese market has been positioned as a significant opportunity for mobile game companies for some time now. The numbers are compelling; China is now the world's largest games market accounting for over 25% of global gaming revenue or some \$40 billion in 2018 alone.

China is a country of big numbers. There are approximately 800 million smartphone users in China, and the majority of those users are increasingly willing to spend more on virtual goods over material goods as part of their entertainment budget. So it's easy to understand why so many games companies outside of China see it as a market that's important to get into.

But just as the Chinese opportunity is a big talking point, so too are the various barriers to entry. Games and entertainment content is strictly regulated, and China has its own unique mobile ecosystem and social media landscape. This means that for many companies, partnering with local publishers and marketing companies is the only effective way to launch and support their games.

What we seem to miss in these discussions are the views of Chinese consumers themselves. How do they feel about mobile games, and what are their views on the kinds of games and gaming brands from the West that they like to play? How do they discover games, and what do they think about how games are advertised and marketed at them? After all, it's their appetite for mobile games that have created this opportunity in the first place.

In order to represent the voice of Chinese gamers, we worked with research firm Newzoo to survey Chinese consumers directly, to find out their views and opinions. The result is what we believe is the first comprehensive survey of Chinese mobile gamers. We hope that the insights contained in this report will help you to better understand what motivates Chinese gamers to choose and play games, and in doing so understand the nuances of this incredible market a little bit better.

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## METHODOLOGY



We worked with research and insight firm Newzoo, a leading global provider of games and esports analytics, to create and carry out this survey.



We used an online questionnaire to survey 1,007 respondents from tier 1 and tier 2 cities in China, aged between 10 and 50 years old. (With some 338 cities in China, there is an unofficial classification of these cities into six different tiers, depending on their size, population and economic importance. (Tier 1 and 2 cities are drawn from the 50 largest and most populous.)



The online survey was sent out to "invitation only" respondents, and conducted over 10 days (including one weekend for a balanced sample) between March 13th–22nd 2019.

We asked respondents to self-identify as active mobile gamers, who play games at least once per month.

The objective of the research was to gain an overall understanding of Chinese mobile gamers' behaviour and attitudes towards mobile gaming. We asked a series of questions covering six main areas:

- Demographics
- Their mobile gaming habits
- Preferred genres & game types
- Searching & viewing behaviour for new games
- Monthly spending on mobile games
- Opinions on advertisements

## SUMMARY OF KEY FINDINGS

Almost three-quarters of Chinese mobile gamers work full time. 74% of the respondents said they were in full time paid employment, with a further 16% saying they were students. The remaining 10% was made up of self-employed and part-time workers.



**74%** Full time paid employment

**16%** Students

52% of mobile gamers play for more than an hour per day. Based on our survey, the majority (63%) of gamers play for either 30 minutes to an hour per day, or between one and two hours per day. Only 15% said they played for 30 minutes or less.



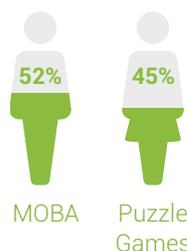
Lunch time

Older gamers are twice as likely to play during their lunch break. 25% of our respondents said they played mobile games during their lunch break, making it the most popular time of day to play. However, while 34% of mobile gamers aged 45–50 cited playing during lunch breaks, only 19% of 21–25-year-olds said the same.

92% of Chinese mobile gamers keep playing a game for more than a week. With so many games competing for attention, player churn is a significant issue right around the world. A huge majority of respondents said they typically play a game for more than a week before swapping to something else, and 87% said that they had played fewer than five different games in the previous month.



Play a game for more than a week



MOBA

Puzzle Games

The two most popular mobile game genres in China are Puzzle Games and MOBAs. Puzzle games were the first choice of 52% of female gamers, whilst 45% of male gamers prefer MOBAs to anything else.



Chinese mobile gamers like interacting with other players. When we asked about what motivated them to play mobile games, 36% of people said the biggest motivator was interacting with and competing against friends and other people. The second main motivator was the quality of the game.



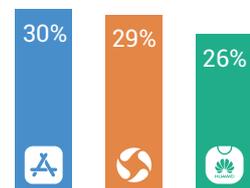
Chinese mobile gamers prefer local publishers over Western ones. When asked to express a preference, 86% of people said they preferred games from Tencent and NetEase to well-known Western publishers such as Supercell.



App store rankings and top charts are essential for finding games. When asked about how they discover games, 36% cited rankings in app stores, followed by 29% of people who sought recommendations from friends and family. Interestingly, despite all the noise about online influencers, only three per cent of people mentioned them as a way to find games to play.



Apple has the most popular app store in China - but only just 30% of our respondents said they downloaded games from the Chinese Apple app store, followed closely by 29% who downloaded Tencent's MyApp store, and 26% from the Huawei app store.



game spend  
< ¥40

Most mobile gamers spend less than ¥40 (\$5.80) per month. A surprisingly low number-15% of respondents said they spend nothing at all on mobile games. While the majority spend less than ¥40, 45% of 26–30-year-olds regularly spend more than ¥70 (\$10). At the extreme end, 3% said they spent more than ¥330, or almost \$50 a month.

Chinese gamers seem happy with adverts and In-App purchases. When asked if they preferred to play F2P, premium or ad-funded mobile games, 44% said F2P games with In-App purchases, and 17% said they preferred games that were totally ad-funded.



## DEMOGRAPHICS AND MOBILE GAMING

### The demographics of the typical Chinese mobile gamer

When we look at the demographics of Chinese mobile gamers, there is almost parity in the gaming habits of men and women. The only significant divergence is amongst gamers that said they play five or more days a week, which shows a 60/40 bias in favour of men. For gamers that said they played fewer than five days a week it was a much even 52/48 split.

Play games five or more days a week:

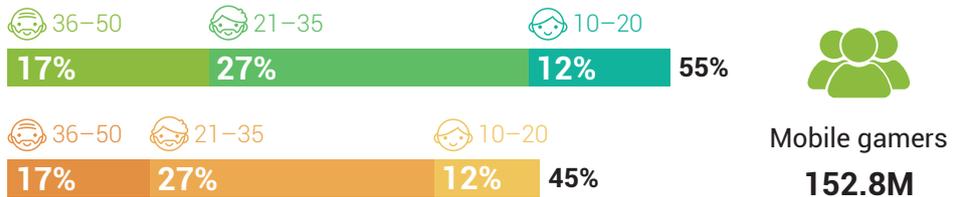


Fewer than 5 days:



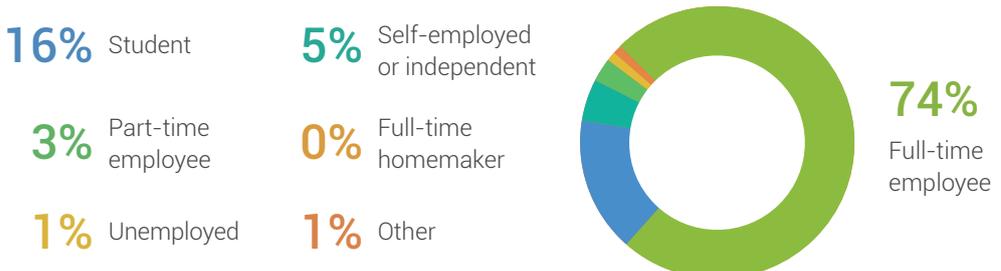
Based on our sample we have estimated that of the approximately 700 million smartphone owners in China, 153 million falls into the category of active mobile gamers-that is, people who play mobile games more than once a month. As we'd expect, the most active gamers fall into the 21-35 age bracket, with close to parity between men and women.

#### AGE-GENDER SPLIT



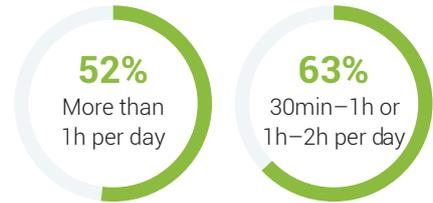
Almost three-quarters of Chinese mobile gamers work full time, with 74% of the respondents saying they were in full time paid employment and a further 16% saying they were students. The remaining 10% was made up of self-employed and part-time workers.

#### WORK SITUATION

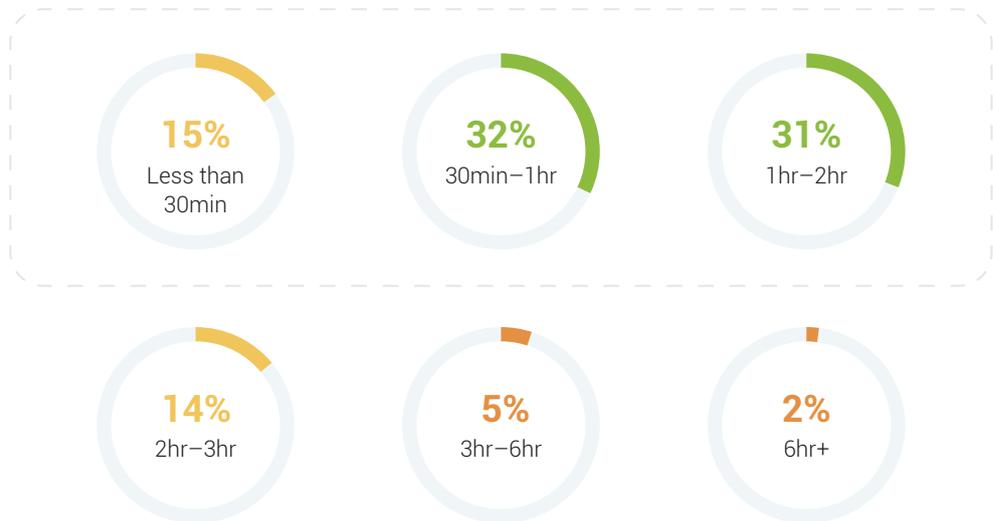


## MOBILE GAMING AS A DAILY HABIT

More than half (52%) of respondents said they play mobile games for more than an hour every day. The majority (63%) of gamers play for either 30 minutes to an hour per day, or between one and two hours per day. Only 15% said they played for 30 minutes or less, and 7% for 3 hours or more.

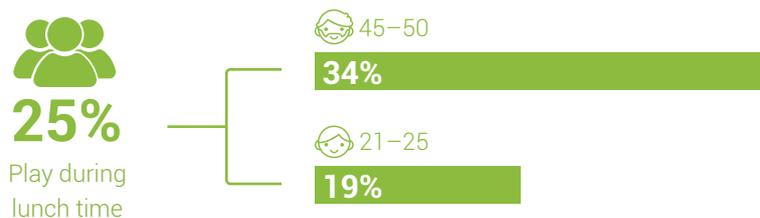


### TIME SPENT ON MOBILE GAMES PER DAY

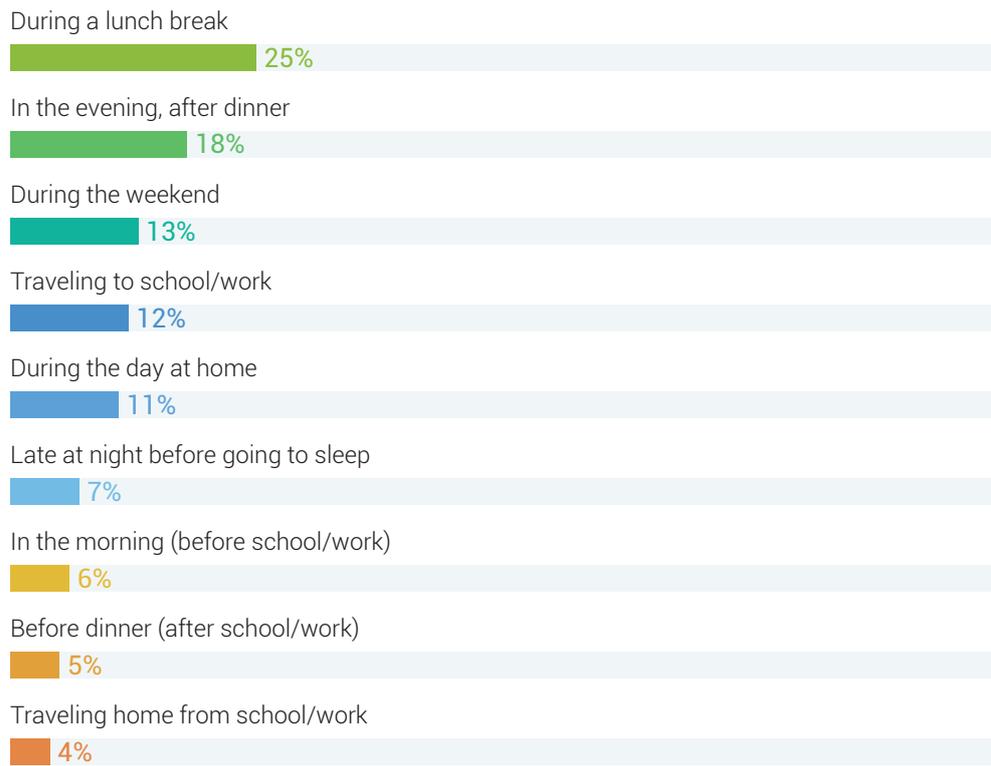


25% of our respondents said they played mobile games during their lunch break, making it the most popular time of day to play. However, while 34% of mobile gamers aged 45-50 cited playing during lunch breaks, only 19% of 21-25-year-olds said the same.

Clearly, mobile gamers in China are like gamers anywhere else in the world, in that they use travel time, work time breaks and time outside of work as opportunities to play their favourite mobile games.



## MOST LIKELY MOMENTS OF PLAYING MOBILE GAMES



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## CHINESE MOBILE GAMERS PLAY FEWER GAMES, FOR LONGER



92% of Chinese mobile gamers keep playing a game for more than a week. With so many games competing for attention, player churn is a significant issue right around the world. A huge majority of respondents said they typically play a game for more than a week before swapping to something else, and 87% said that they had played fewer than five different games in the previous month.



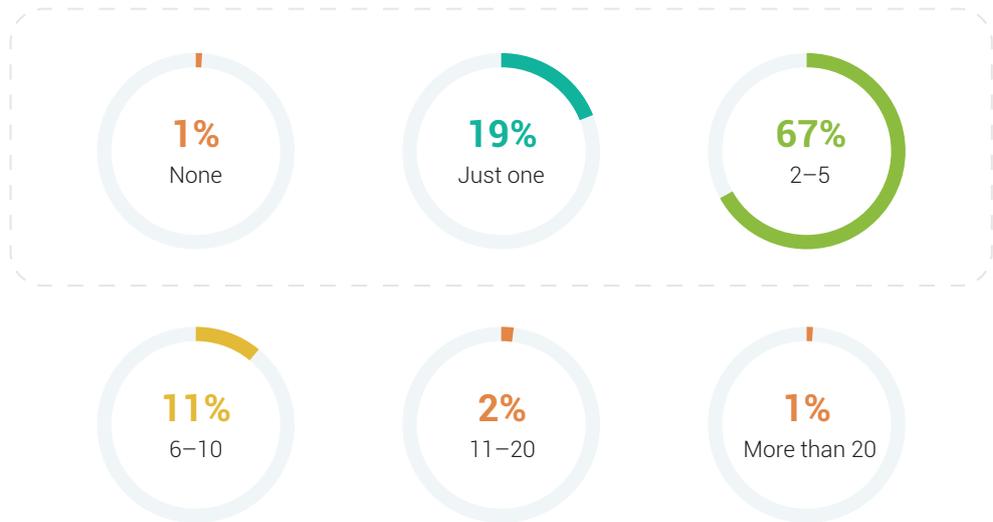
**92%** keep playing a game  
for more than a week



Interestingly, although there was a drop in the number of people saying they were still playing the same game for at least 3 weeks after downloading it, the number of people still playing after a month was 30%-virtually the same as were playing after a week.

Beyond that, an impressive 18% said they were still playing after three months or more. Perhaps this level of engagement and loyalty is linked to the relatively small number of games our respondents told us they were playing at any one time.

## NUMBER OF MOBILE GAMES PLAYED LAST MONTH



## AVERAGE DURATION PLAYING A MOBILE GAME



## MOBILE GENRES AND TYPES PLAYED

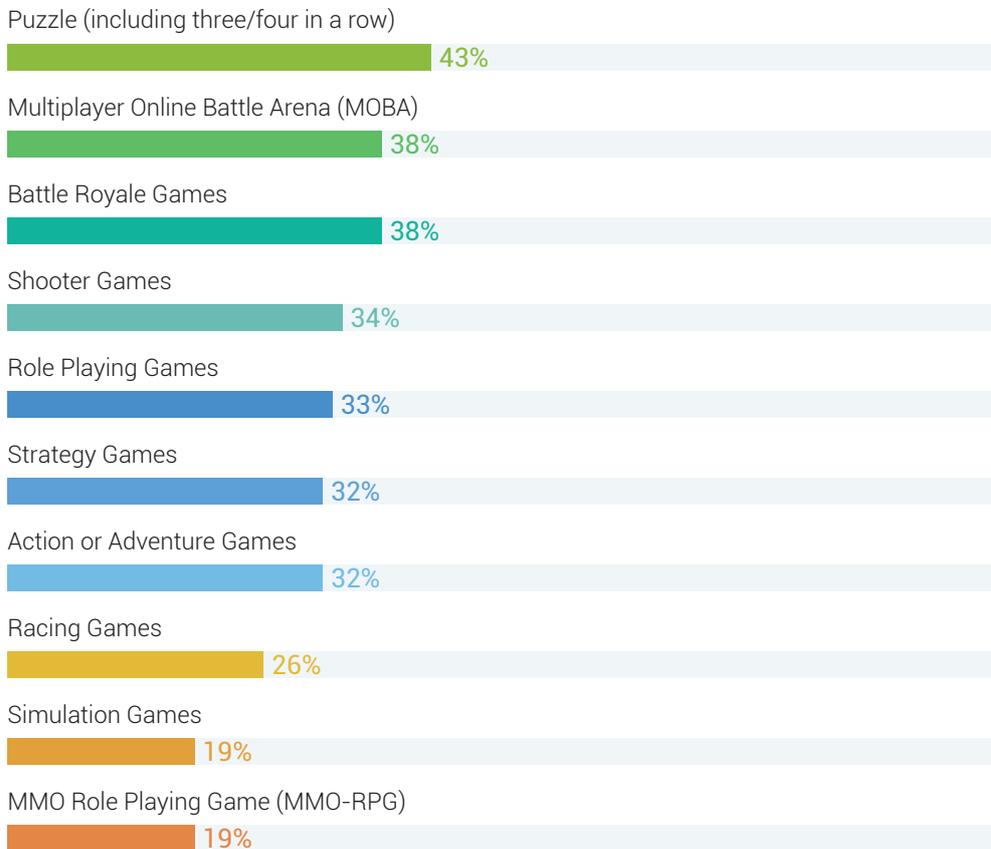
### In China, Puzzle Games and MOBAs are the kings of the charts

The two most popular mobile game genres in China are Puzzle Games and MOBAs. Puzzle Games were the first choice of 52% of female gamers, whilst 45% of male gamers prefer MOBAs to anything else.

The rapid rise of Battle Royale games means that they are now the third favourite genre of game. Even without Fortnite Chinese, gamers have many different million-selling Battle Royale titles to choose from, including PUBG, Knives Out and Rules of Survival.



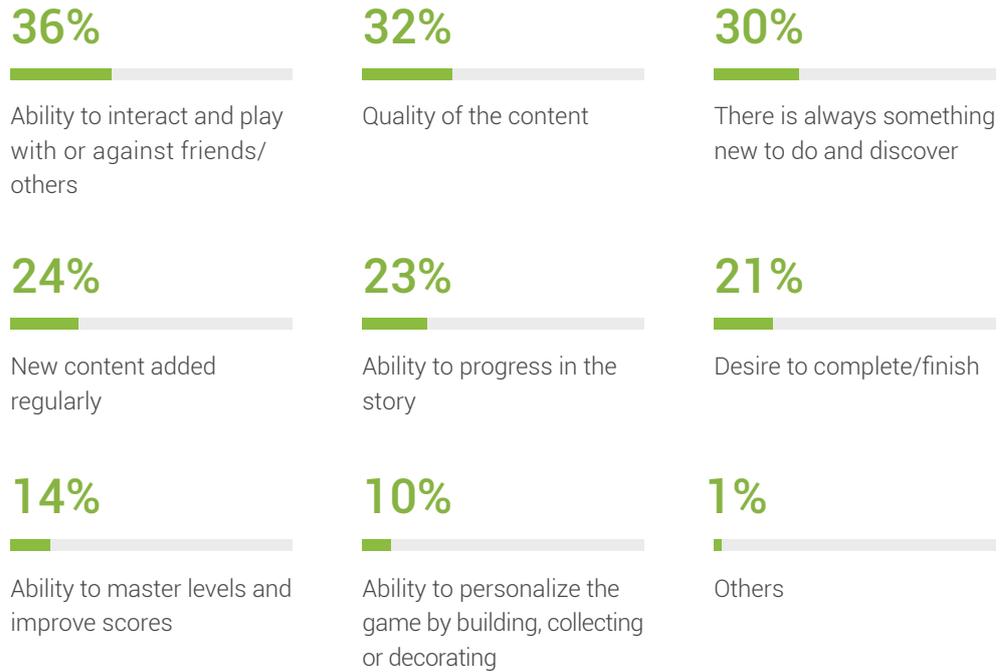
### FAVOURITE MOBILE GAME GENRES



Chinese mobile gamers clearly really like interacting with other players. When we asked about what motivated them to play mobile games, 36% of people said their biggest motivator was interacting with and competing against friends and other people. The second main motivator was the quality of the game.



### MOTIVATION OF PLAYING MOBILE GAMES

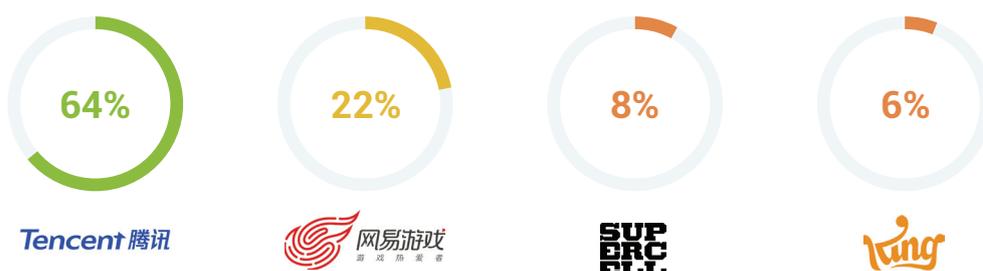


Several of the answers were related to the expectation of new content and challenges in their favourite games, and the motivation we get from a sense of 'mastery' - that is, the satisfaction we get from completing a task or mastering a skill. Game designers have become well versed in designing games that keep people engaged and interested via both of these approaches.

## CHINESE MOBILE GAMERS PREFER HOME-GROWN GAMES OVER WESTERN BRANDS

The Chinese mobile gamers we surveyed clearly preferred local publishers over Western ones. When asked to express a preference, 86% of people said they preferred games from Tencent and NetEase to well-known Western publishers such as Supercell.

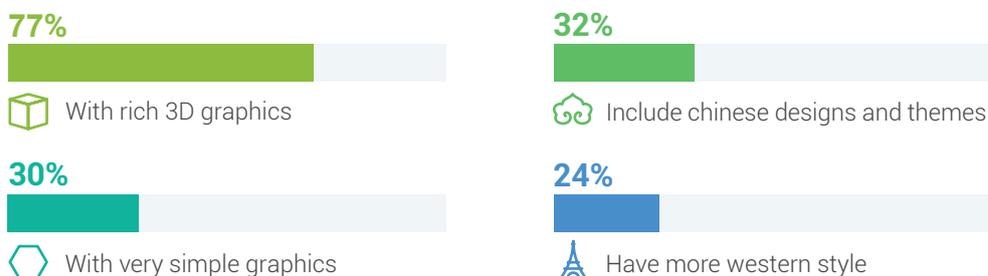
### PREFERRED MOBILE GAME PUBLISHERS



However, it is worth remembering that the Chinese government requires non-Chinese companies to work with either a local partner or to operate via a locally registered office, so many well-known Western games are released under a local publisher brand. For example, FIFA is published in China by Tencent, whereas gamers outside of China recognise the EA and FIFA brands as inseparable.

There is also a clear preference for games that include Chinese designs and themes. Localising games to the extent that character models and environments are changed to be more in tune with local tastes is always a good idea. Some of the most popular games in China feature storylines and characters taken from Chinese literature and history, and this is another way to cater to players in this market.

### PREFERRED MOBILE GAME VISUAL STYLES



Most respondents (77%) said that they preferred games with rich, 3D graphics - perhaps linked to the popularity of MOBA and RPG games, which tend to have a very console-like visual style.

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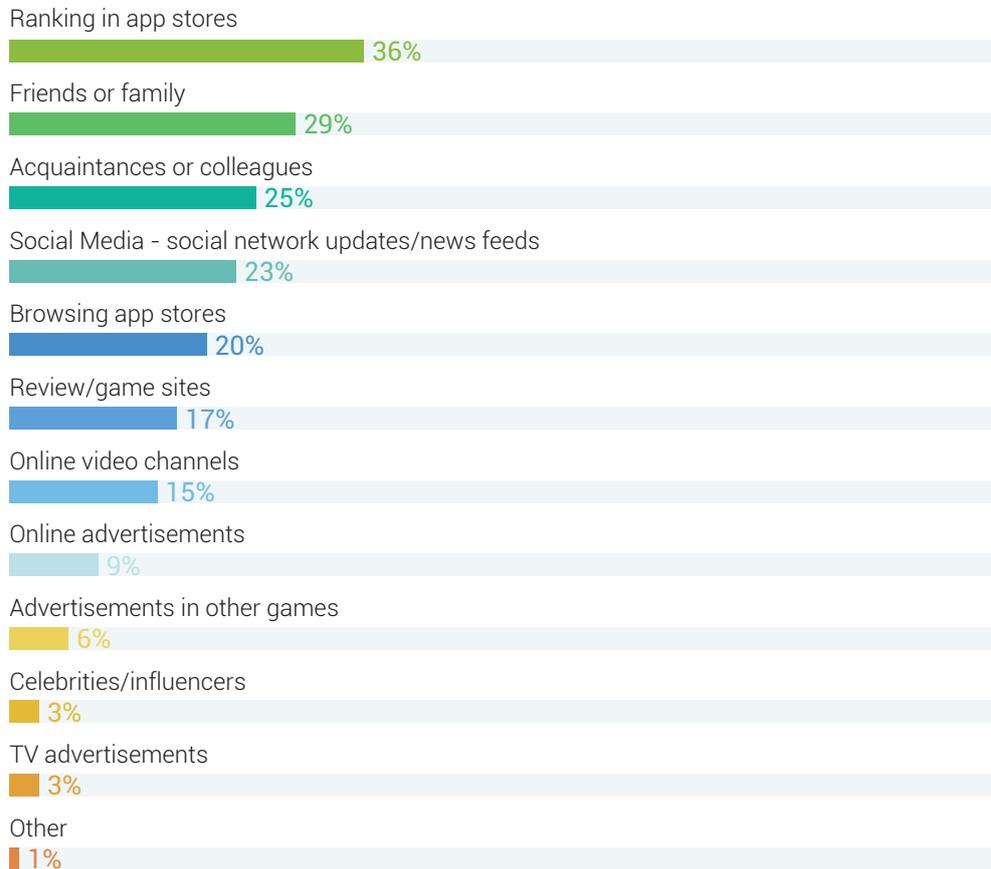
## DISCOVERING MOBILE GAMES

### Rankings and top charts are key to app discovery

When asked about how they discover games, 36% cited rankings in app stores, followed by 29% of people who sought recommendations from friends and family. This shows that app store rankings and placement in top ranking charts continue to be an essential way for consumers to discover new games. Interestingly, despite all the noise about online influencers, only three per cent of people mentioned them as a way to find games to play.

Advertising as a way to discover games was not especially popular, with only 9% saying they responded to online ads, and 6% ads in other games. TV advertising came even lower, with just 3% of gamers saying TV ads helped them find new games to play.

#### SOURCES FOR FINDING MOBILE GAMES



Of course, it is worth remembering that none of these marketing channels exists in isolation and any app company that's serious about marketing will be using a range of approaches to get their app noticed. It's for this reason that companies talk about the concept of a marketing 'journey', with different kinds of customer touch-points helping to encourage and influence any resulting purchases. In this case, it is perfectly feasible that different forms of advertising help to inform any subsequent app store search for a particular game.

## With no Google Play Store in China it's Apple, Tencent and Huawei who have the most popular app stores.

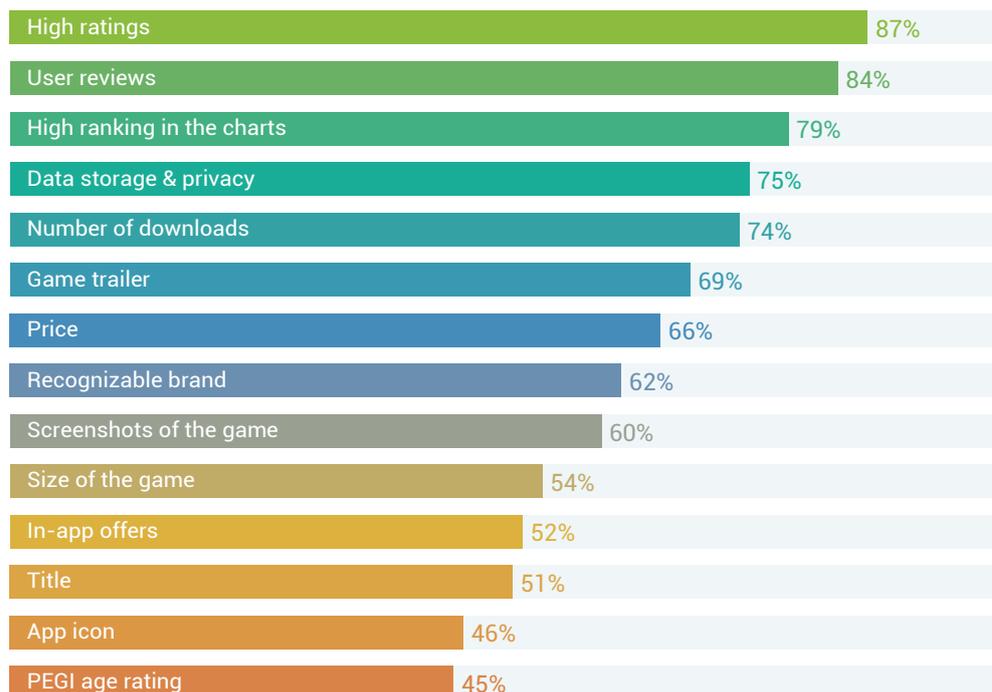
With a market share of 75% in China, Android is by far the most dominant operating system. However, even with less than 25% market share, Apple continues to have the most popular app store in China - but only just. 30% of our respondents said they downloaded games from the Chinese Apple app store, followed closely by 29% who downloaded Tencent's MyApp store, and 26% from the Huawei app store.



Android market share in China

Positive ratings are the first and most important thing our respondents said they looked for once they were on an app store page, with 87% ranking it the most important factor. Second most important is user reviews, and third is whether the app is featured in any top ranking charts within the store. Of course, all of these can be difficult to generate for a game which has only just launched, so it's worth thinking about what marketing can be done to help generate this kind of content quickly.

### IMPORTANCE OF ASPECTS IN PRODUCT PAGE



Video footage and trailers have become more important to consumers, with 69% of people saying they are an important part of the app store page. 28% of Apple device owners in our survey said they watched video trailers before deciding to download a game. In contrast, only 9% said they looked at screenshots.

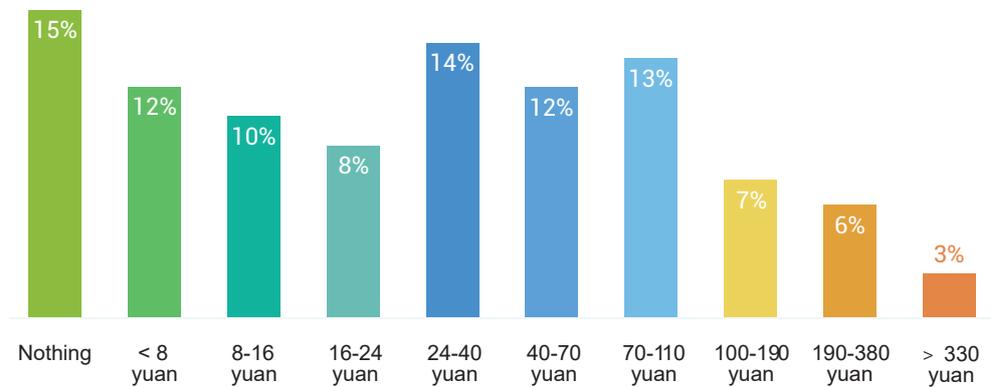
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## MOBILE SPENDING & ADVERTISING

### 85% of gamers we surveyed regularly spend on mobile games

Most of the mobile gamers who completed our survey said they spend less than ¥40 (\$5.80) per month. A surprisingly low number - 15% of respondents said they spend nothing at all on mobile games. While the majority spend less than ¥40, 45% of 26-30-year-olds regularly spend more than ¥70 (\$10). At the extreme end, 3% said they spent more than ¥330, or almost \$50 a month.

MONTHLY SPENDING ON MOBILE GAMES



A majority (72%) also said they pay for monthly VIP membership. This is something that is common in China both as a way of addressing the strict rules around how in-app purchases are implemented, but more as a way of building really strong engagement and monetization. There are often different tiers of VIP memberships with tiered costs that offer anything from exclusive in-game content to 24-hour helplines and VIP-only forums.

## REWARDED VIDEO AND PLAYABLE ADS ARE THE MOST EFFECTIVE FORMATS

The recent crack-down on mobile games in China which aggressively promote In-App purchases and real-money monetization is well documented. Microtransactions and In-App adverts have always been a feature of the Chinese mobile games market, and based on the responses to the survey it appears Chinese gamers continue to be happy with both these forms of monetization.

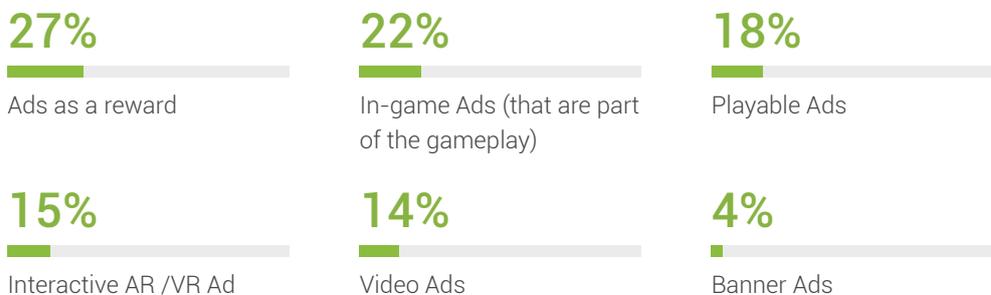
When asked if they preferred to play F2P, premium or ad-funded mobile games, 44% said they preferred F2P games with In-App purchases, and 17% said they preferred games that were totally ad-funded, and 24% chose premium or pay-to-play mobile games.

### PREFERENCE FOR MOBILE GAME TYPES



When it comes to the kinds of adverts Chinese mobile gamers prefer, 27% said rewarded ads. In-game ads which are designed to be part of the game, for example, product placement or ads included in level design - were the next preference. Third was playable ads. In fact, all of the forms of advertising that offer a more immersive experience - from rewarded ads through to video - had a reasonable level of support. It is interesting, therefore, to see how few players were OK with banner ads in their games, with just 4% of people saying these were their preference.

### PREFERRED TYPES OF ADVERTISEMENTS



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## CONCLUSION

Our survey may not have thrown up any great shocks, but it has certainly affirmed the view of Chinese consumers as active and eager gamers.

With more than half of our respondents saying they play games every day, that is considerably higher than gamers in the US and UK, who say they typically play 3-4 times per week. Chinese mobile gamers also seem to be a pretty loyal group, with 92% playing a new game for at least a week, and 30% for more than a month. No wonder that many of the most popular and top grossing mobile games in the world come from Chinese publishers. It seems that if you can keep Chinese gamers happy, you have the ingredients for a global hit.

When it comes to spending money on their favourite games there is a surprisingly even spread across different spending levels, right up to those mobile gaming 'whales' who said they regularly spend more than \$50 a month. But what was most unusual about the spending habits of our sample is that so few (only 15%) said that they spend nothing at all on the games they play. For companies looking to launch into China, there is clearly a big audience of paying mobile gamers - as long as that game has the right look and feel, and the right kind of monetization. As we've covered on our website in the past, localisation is one of the most important factors for success in China - especially when the gamers in our survey clearly preferred games that feature Chinese designs and themes.

It's well known that Free-to-Play (F2P) dominate the mobile games landscape in China, and our research confirms that games built around in-app purchases (IAP) are the preference of the majority. Overall, 17% said they actively preferred ad-funded games, but the attitude to advertising did vary by age. For example, only 10% of gamers aged 26-30 said they preferred free-to-play games with adverts.

Of course, mobile advertising is about more than just monetization. Programmatic mobile ads have become the key user acquisition method for any F2P game. From the responses we collected there was a clear preference for more interactive and engaging ad formats, such as rewarded video, playable ads, and VR and AR content.

Perhaps the biggest takeaway from the data we collected is that Chinese mobile gamers are far from a homogenous bunch. Chinese consumers right across the age spectrum are mobile-savvy as befits residents of a mobile-first country. From hypercasual games to hardcore MOBA's, Chinese gamers are fans of them all, and as a market, it is home to a wealth of innovations and experiments, from VIP memberships to VR advertising.

If China is already the world's biggest games market by the numbers, it must also be near the top when it comes to the passion and enthusiasm of the millions of those consumers that play games every day.



## About Mintegral

Mintegral is a leading mobile advertising platforms in Asia. Driven by AI technology it provides user acquisition and monetization solutions to advertiser sand mobile developers worldwide.



Mintegral brings together the Eastern and Western markets for mobile games and apps, simplifying the challenge of cross-regional mobile app marketing. Mintegral leverages rewarded video, native video, 3D video, playable ads and other interactive creatives to help improve engagement rates and drive higher ROI.



With unmatched expertise in launching and marketing apps in the APAC region, Mintegral is already helping thousands of app developers and publishers bridge the gap between the East and West.



Mintegral International Ltd is headquartered in Beijing, China, with offices in the US, Europe, India and Japan.

Find out more at [www.mintegral.com](http://www.mintegral.com).



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