

Mobile Gaming - UK - October 2019

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“The mobile games sector is an already established powerhouse, which will continue to see robust growth through to 2024.”

– Joe Birch, Consumer Technology Analyst

This report looks at the following areas:

Technological infrastructure advancements will provide the platform for the development, distribution and consumption of mobile games, growing a diverse audience and capturing the focus of marketers and brands outside of traditional gaming confines.

- Technological infrastructure and developments will power the mobile gaming market to new heights by 2022
- Gaming subscription models will be the next gold rush for content platforms
- Mobile advertising spend doubles in the space of a year with Gameloft overtaking Niantic as the number one spender

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DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

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The facts

The implications

The Market – What You Need to Know

Mobile gaming continues its upward growth trajectory

Gaming is the most popular category on revenue on both the app store and Google Play in the first half of 2019

2019 looks set to be a ground-breaking year for the mobile gaming genre

Beyond 2019, Mintel forecasts that the mobile gaming market will continue to see further growth until 2022

Gaming continues to be the largest app category for purchasing

The cloud set to unlock mobile gaming potential as tech giants scramble to be first mover

Augmented Reality looks set to surpass Virtual Reality in developer's agenda and AI set to influence game development and gameplay

Investment in mobile gaming hits record highs in 2019

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Mobile gaming continues its upward growth trajectory

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Gaming continues to be the largest app category for purchasing

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5G set to enhance mobile gaming experience

Cloud gaming set to unlock mobile gaming potential

AR looks set to surpass VR on developers' agendas

Continual improvements in AI technology set to drive the market forward

Analysing player behaviour

Identifying potential revenue streams

Enhancing other new technologies

Speciality gaming phones will drive user experience and provide infrastructure for innovation

Mobile esports continued their upward trajectory

Freemium games still lead the way in revenue generated

Loot boxes continue to be monitored by government

Investment in mobile gaming hits record highs in 2019

Direct to consumer propositions – The next gold rush?

Blockchain's impact on the gaming landscape

Companies from outside the gaming sphere, look to make an imprint by gamifying their stable of brands

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Tech giants set out their cloud gaming vision
 Call of Duty: Mobile – Breaks records on release of its free-to-play app game
 Mario Kart Tour September release hits 4.1 million downloads in its first month
 Pokémon Masters launches early on Android and iOS to a deluge of demand
 Konami Slates October release for flagship PES mobile title
 New AR titles released
 Developers continue to capitalise on the global esports phenomenon
 Mobile advertising spend doubles in the space of a year with Gameloft overtaking Niantic as the number one spender
 Niantic makes use of cinema to support Harry Potter: Wizard Unite
 In-game advertising creates its own opportunities

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 Other tech giants launch their own cloud mobile gaming services
 Microsoft enters the arena with xCloud
 Pokémon Masters launches early on Android and iOS to a deluge of demand
 Konami Slates October release for flagship PES mobile title
 Mario Kart Tour September release hits 90 million downloads in its first week, but monetisation strategy dogs the success
 Mobile versions of cult classics to launch at the back end of 2019
 Board Games to become mobile apps
 Final Fantasy... gets multi-player treatment
 New AR titles released
 Call of Duty: Mobile – Breaks records on release of its free-to-play app game
 Developers continue to capitalise on the global esports phenomenon

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Mobile advertising spend doubles in the space of a year with Gameloft overtaking Niantic as the number one spender
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 In-game advertising creates its own opportunities
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 Nielsen Ad Intel

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Gaming app usage static, but overtaken by finance/payment category
 Puzzle, trivia and word games continue to be the most popular
 Male bias remains in key genres but with signs that change is coming
 Older generations are engaged with mobile games
 Smartphone the go to device for gaming

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- The smartphone could be a proxy for the console
- Mobile gaming is most popular in the home environment
- VR and AR games not seen as the Holy Grail by consumers
- Genre drives varying levels of in-game expenditure
- A paid-for subscription service could attract a variety of audiences

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Forecast methodology

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