



KANTAR

Mobile Gaming: The New Mainstream Consumer Channel

February 2026



APPLOVIN
Axon

Prepared for Axon by AppLovin

Project Background



Research Objectives

AppLovin operates a large-scale mobile advertising platform that connects app developers and advertisers to drive growth and monetization.

The primary objectives of this research were to:

- Establish who mobile gamers are and why they matter
- Show how mobile gaming fits into everyday mobile life
- Demonstrate the emotional and experiential advantage of mobile gaming
- Prove that mobile game ads drive real commerce impact
- Translate outcomes into advertiser opportunity and best practices



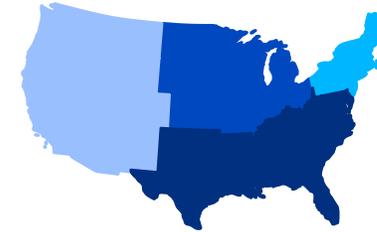
Sample

- **Category:** Mobile Gaming
- **Sample Size:** n2500
- **Qualifications:**
 - Past 3-month mobile gamers
 - Adults 18+



Geography

- **United States**



Fieldwork

- **Methodology:** KAP Custom Survey Automation
- **Fieldwork:** January 2026

Key Findings and Recommendations

Mobile gamers are a mainstream, diverse audience that closely mirrors the US adult population

Mobile gamers broadly reflect the general consumer population across age, gender, education, geography, and household characteristics, reinforcing mobile gaming as a mass-reach environment rather than a niche channel

- Mobile gamers represent a wide range of adult life stages and living situations, reinforcing mobile gaming's ability to reach consumers across varied lifestyles and life moments
- Education and employment patterns align closely with U.S. norms, including a strong presence of full-time workers, underscoring mobile gamers' mainstream economic participation
- Representation across regions and community types demonstrates that mobile gaming delivers national reach rather than concentration in specific geographies or environments

Mobile gamers are influential household decision-makers with strong financial confidence and spending power

Mobile gamers over-index as primary household decision-makers and demonstrate high financial comfort, frequent online shopping behavior, and intent to purchase across both everyday and high-ticket categories

- 70% of mobile gamers report making most household purchase decisions, significantly higher than the general population benchmark
- 70% report feeling financially comfortable, indicating strong discretionary confidence
- 71% shop online at least weekly, and 77% spend \$100 or more per month shopping online
- Future purchase intent is strong across high-value categories such as travel, electronics, furniture, and vehicles

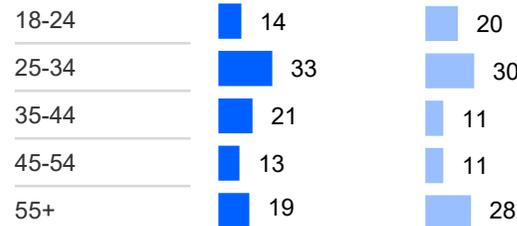
Mobile gaming is a highly engaging, positive, and commercially effective advertising environment

Mobile gaming captures significant daily attention, puts consumers in a positive mindset, and drives fast, incremental purchase behavior following ad exposure

- Mobile gaming is a daily habit for 70% of players and dominates mobile time versus shopping, messaging, and browsing
- Gamers report significantly more positive emotions while playing games than when using social media
- 71% view ads positively while gaming, and 38% report purchasing a product within three months of seeing a mobile gaming ad
- Purchases driven by mobile gaming ads show high satisfaction (92%) and strong intent to purchase again (86%)

Mobile gamers represent a broad, diverse audience that closely mirrors the general consumer population

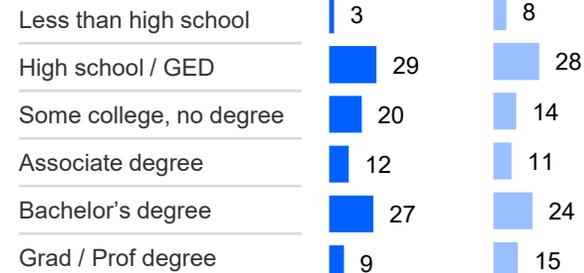
Age (%)



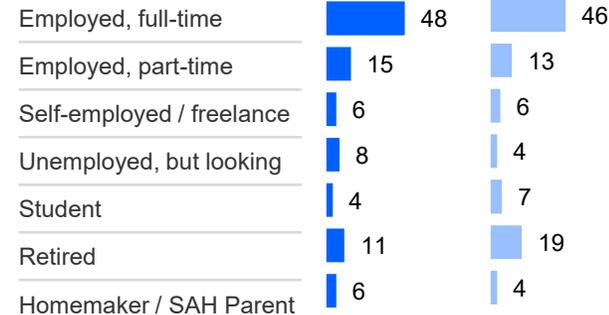
Gender (%)



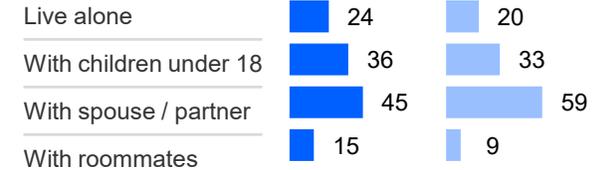
Education (%)



Employment* (%)



Household Composition[^] (%)



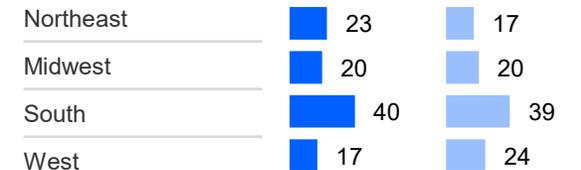
Own/Rent (%)



Urbanicity (%)



Region (%)



■ Mobile Gamers
■ General Population

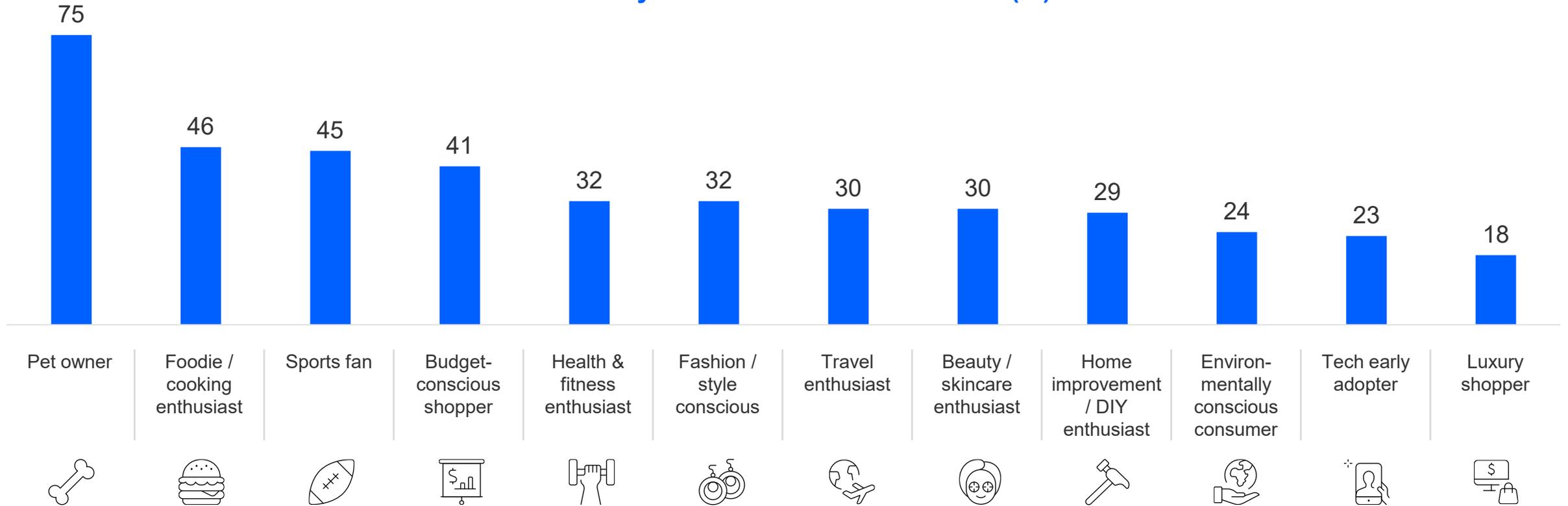
*Employment question offers "Other" as an option; not displayed on chart.

[^]Household Composition question allows multiple selections; "Live alone" is mutually exclusive.

NOTE: General population data is shown for context only; the survey sample is not nationally representative. See speaker notes for sources and methodology.

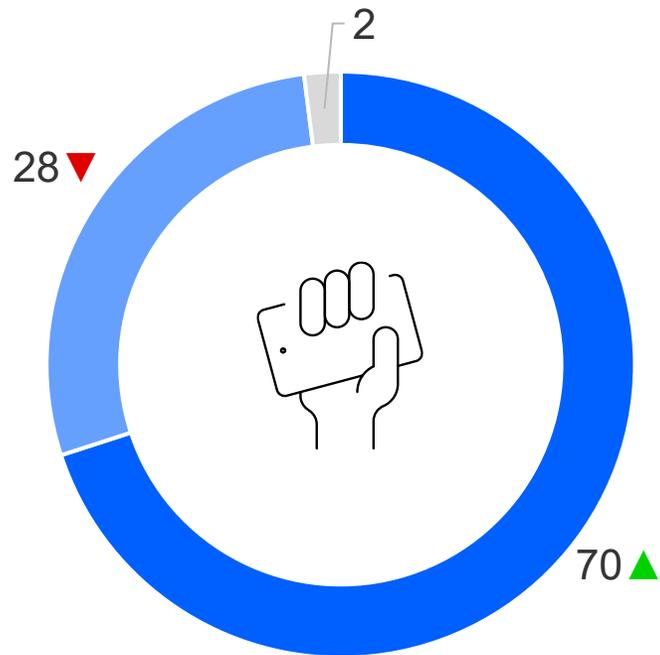
Mobile gaming delivers mainstream consumer lifestyles at scale – across many consumer segments in one place

Lifestyle and Consumer Attitudes (%)



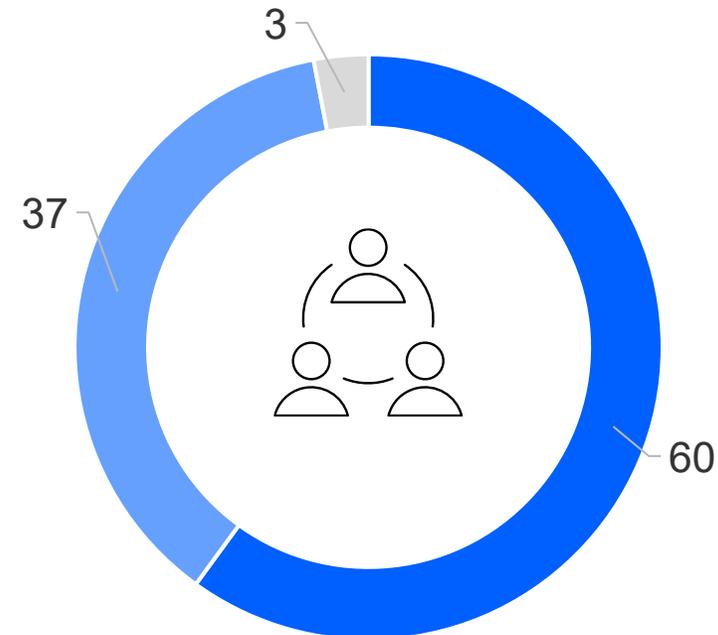
Mobile gamers over-index as primary household decision-makers compared to the general population

Mobile Gamers (%)



- Yes, I make most of the decisions
- Yes, I share decisions equally with someone else
- No, someone else usually makes these decisions

General Population (%)



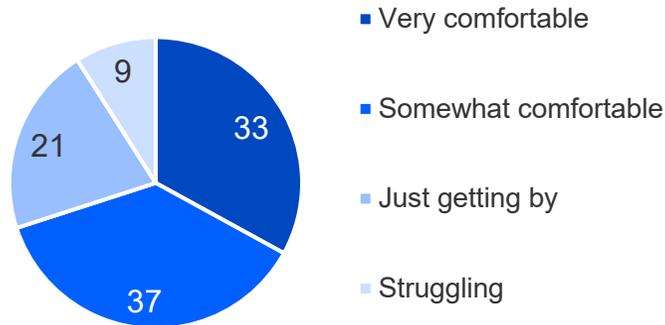
- Yes, I make most of the decisions
- Yes, I share decisions equally with someone else
- No, someone else usually makes these decisions

Mobile gamers are financially secure, and have a propensity to shop online across a broad range of categories

Financial confidence is high among mobile gamers with 70% reporting they feel comfortable with their finances



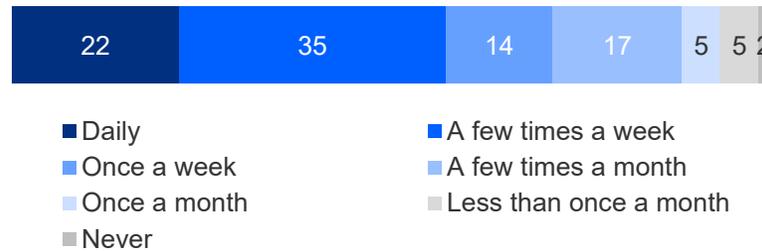
Financial Situation (%)



71% of mobile gamers shop online at least weekly, with 77% spending \$100 or more



Online Shopping Frequency (%)



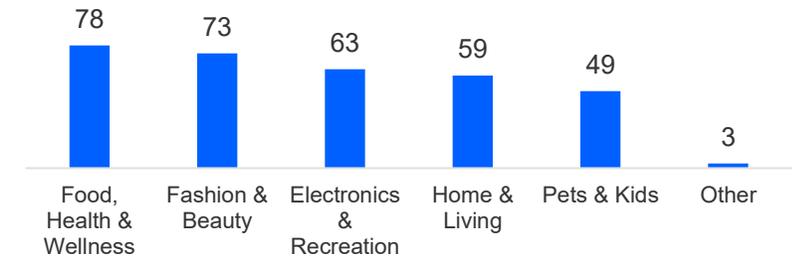
Online Shopping Spend^ (%)



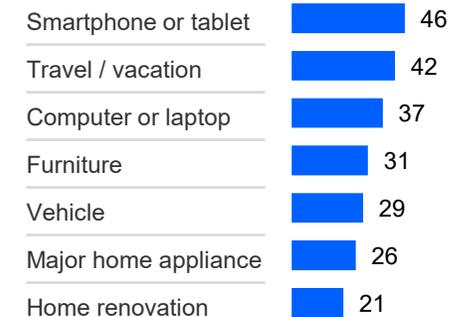
Food, Health & Wellness, and Fashion & Beauty lead recent purchases, while future intent for high-ticket categories is strong



P3M Categories Purchased Online (%)



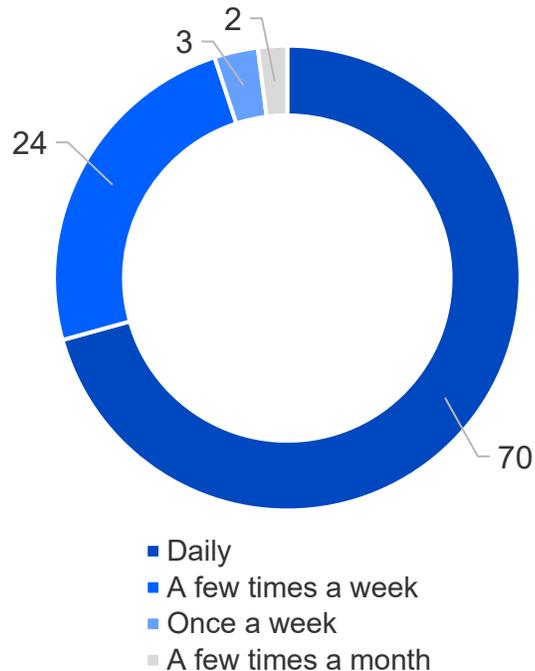
N6M Category Purchase Intent (%)



Mobile gamers are deeply engaged while playing mobile games, making gaming environments especially effective for reaching this audience

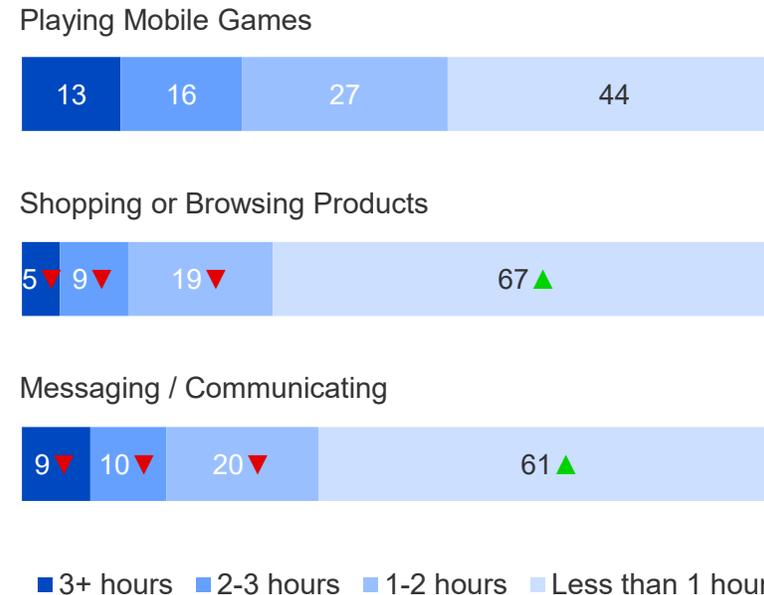
Mobile gaming is a daily habit for most players – 70% play every day; 97% play weekly

Mobile Gaming Frequency (%)



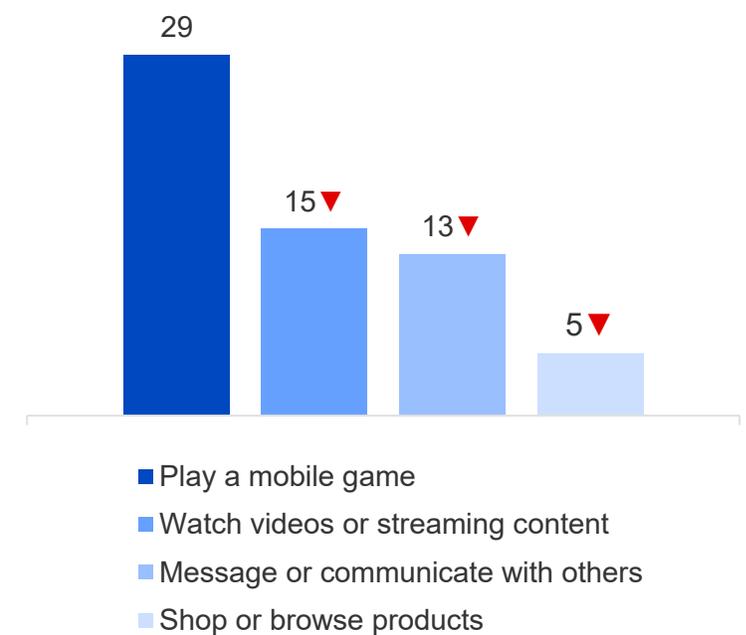
Gaming dominates mobile time – far outweighing shopping / browsing and messaging

Time Spent per Day (%)



Given 10 free minutes, mobile gaming beats video, messaging, and shopping

10 Free Minutes (%)



Mobile gaming combines positive emotional experiences with high levels of brand trust, making it a powerful environment for advertisers

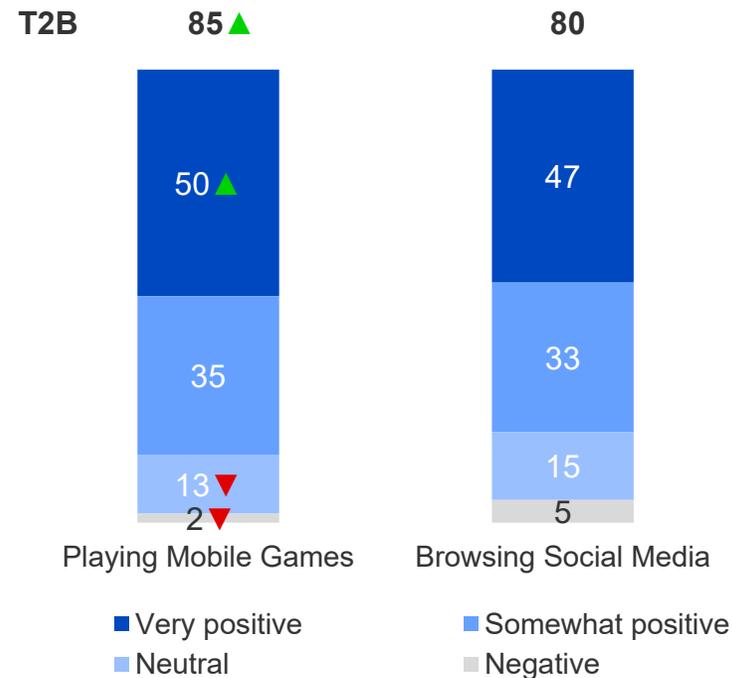
Mobile gaming is woven into everyday moments, with over half playing in the evening at home and while watching TV

Mobile Gaming Moments (%)



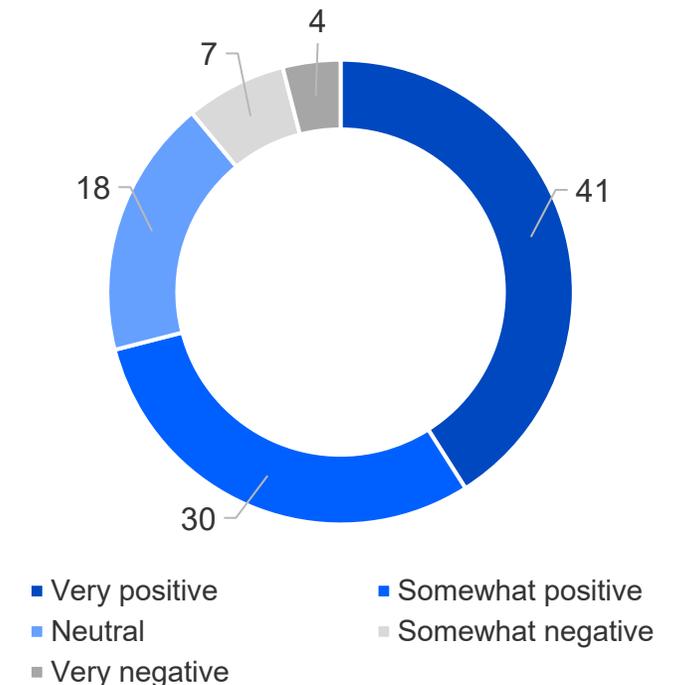
Mobile gamers are in a significantly more positive state of mind while playing games than when browsing social media

Positivity (%)



Ads are viewed positively by 71% of mobile gamers while playing

Ad Experience (%)



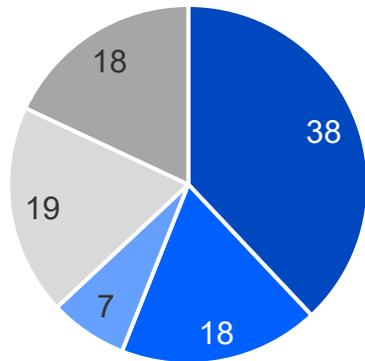
Mobile game ads don't just get noticed—they drive immediate purchase intent and real incremental impact

38% purchased a product within three months of seeing an ad in a mobile game

Mobile game ads prompt fast purchase behavior, with 71% buying the same day

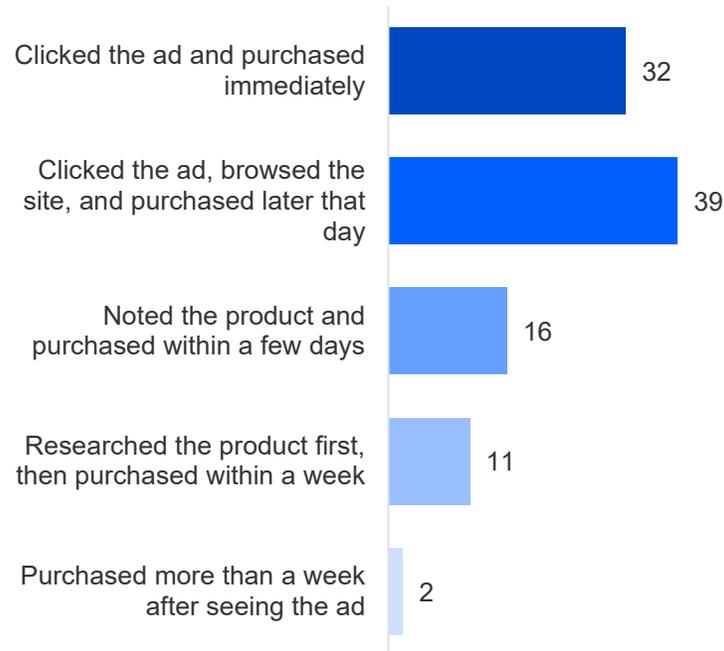
37% of mobile gamers discover something new through ads

Purchase After Mobile Gaming Ad (%)

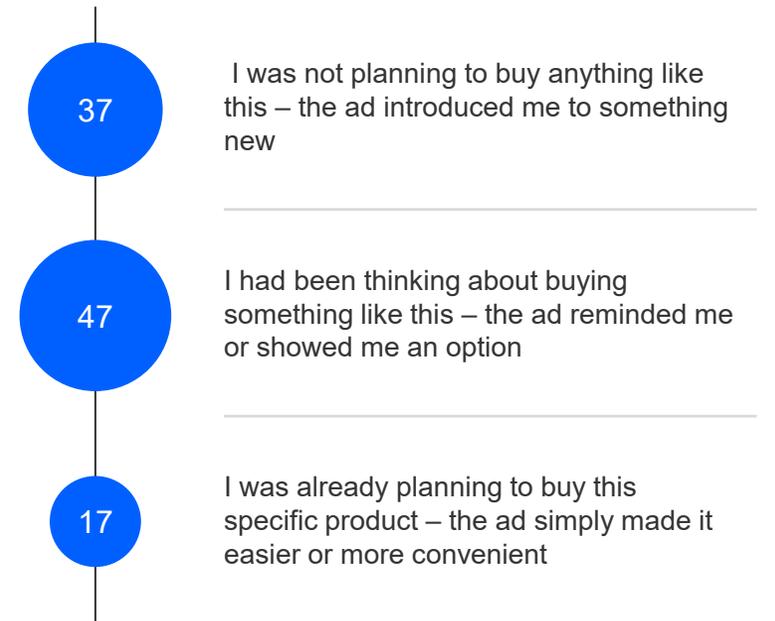


- Yes, within the past 3 months
- Yes, within the past year
- Yes, but more than a year ago
- No, but I have clicked on an ad in a mobile game
- No, I have never engaged with ads in mobile games

Purchase Mode (%)

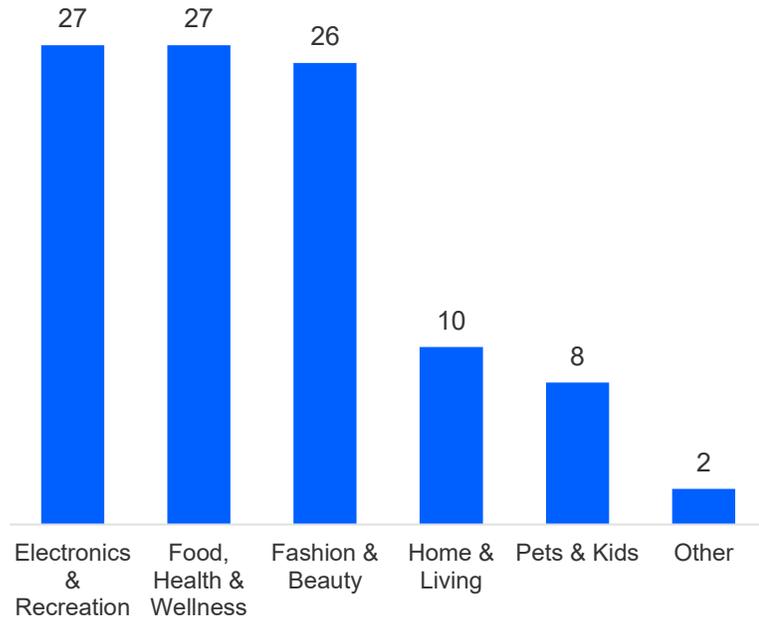


Impulse (%)

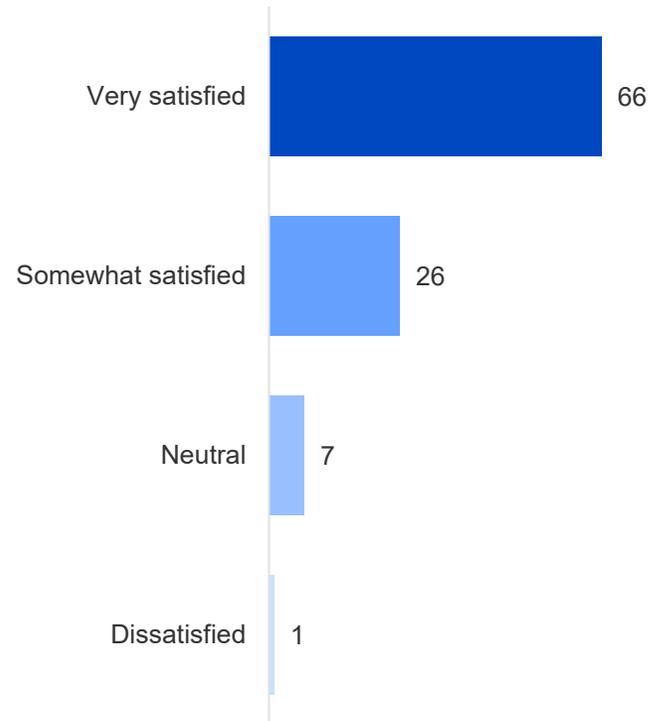


Electronics & Recreation and Food, Health & Wellness lead online purchases, with high satisfaction (92%) and future purchase intent (86%) across categories

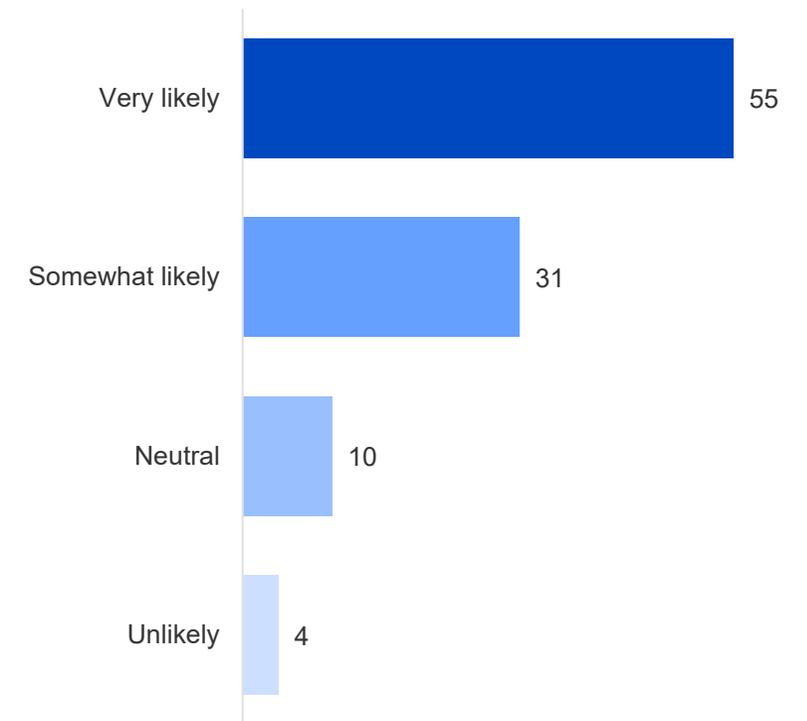
Categories Purchased Online (%)



Purchase Satisfaction (%)



Future Purchase Intent (%)



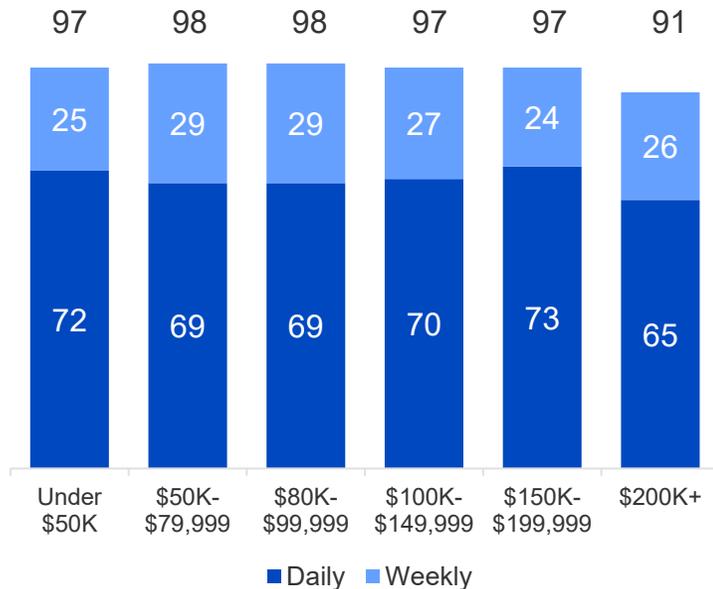
\$100K households game just as often as everyone else—and when they see ads, they’re positive about them and far more likely to buy

Gaming frequency is income-agnostic:
Among \$100K earners, 70% play daily and 96% play weekly

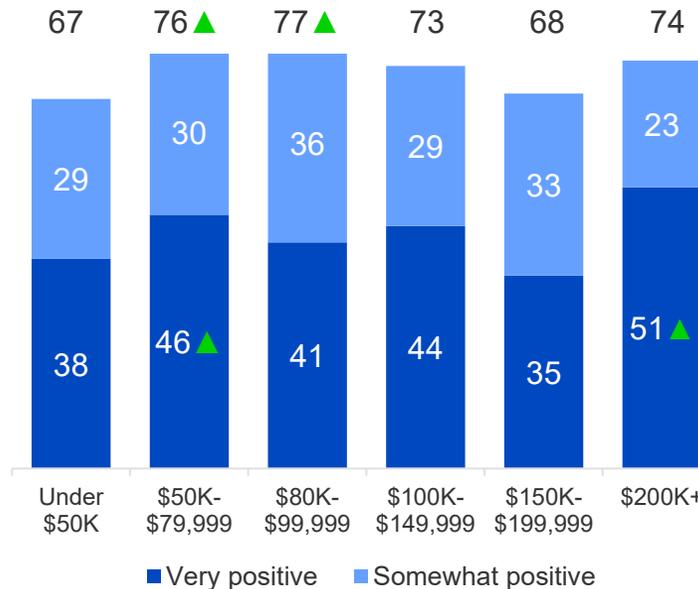
\$200K+ earners are the ad sentiment champions: 51% rate mobile game ads “very positive”

7 in 10 affluent gamers have bought from a mobile game ad, with 45% converting in the past 3 months alone

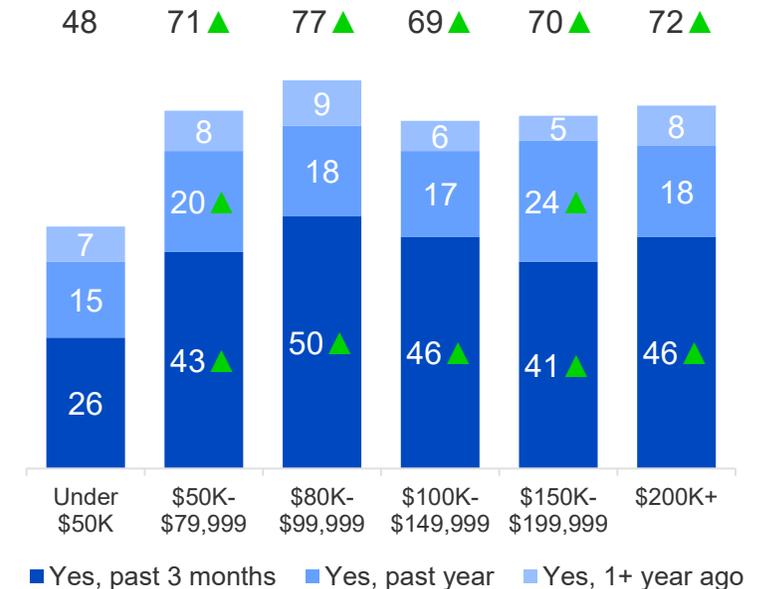
Mobile Gaming Frequency (%)



Ad Experience (%)



Purchase After Mobile Gaming Ad (%)

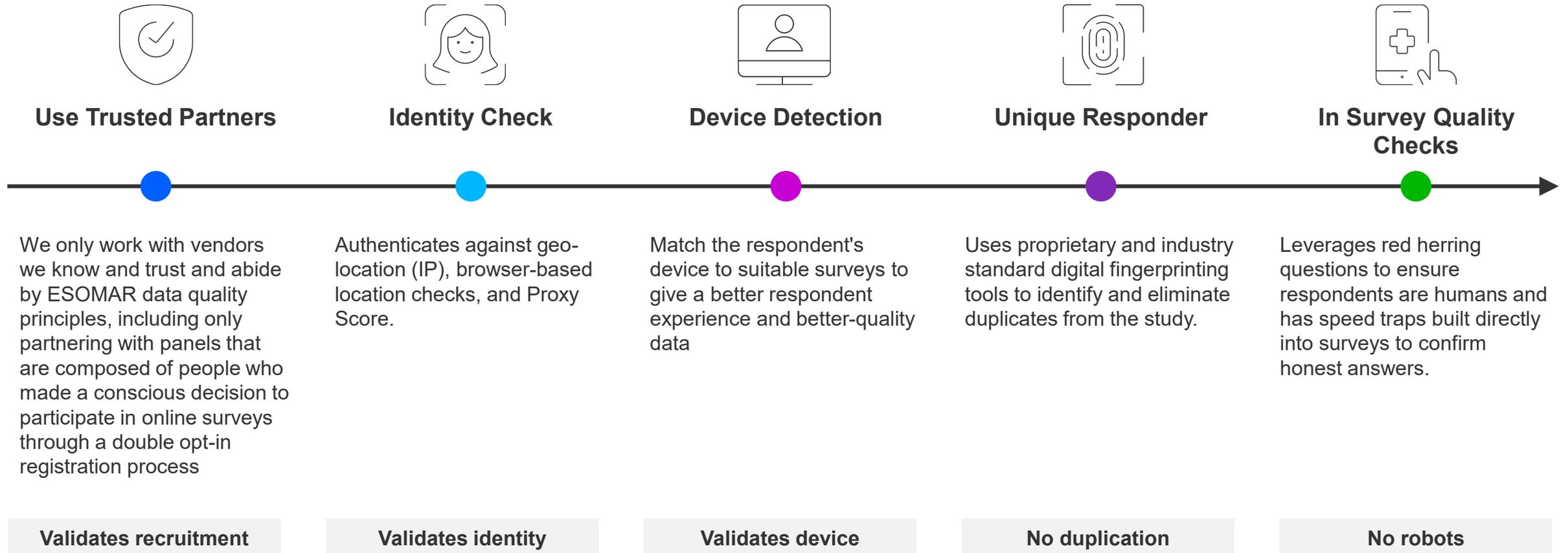


Appendix

The background of the slide is a dark blue gradient. It features several glowing, wavy lines that sweep across the frame from the bottom left towards the top right. These lines are composed of multiple parallel streaks in shades of vibrant blue and magenta, creating a sense of motion and energy. The lines are most prominent in the center and right side of the image, fading into the dark background towards the left.

Kantar has a unique approach to research which ensures reliable and quality results

Quality data is essential for the success of this initiative – and we make no compromises.



Study design is also a key element that contributes to delivering quality sample

Success factors include:



1. Screener Design

We do not tip-off the study purpose until the participant has qualified. We do not ask leading questions such that potential participants can game the screener. Attempting to say “yes” to everything or inflate one’s credentials to qualify results in immediate non-qualification.



2. Data Integrity

All survey questions are pre-tested to ensure question clarity. Rigorous review of soft launch data is conducted to ensure proper survey program functionality and to ensure data responses for all questions are coming back as expected. If needed, we make changes to the survey post pre-test / soft launch based on learnings from these crucial phases.



3. Responsive Tools

Award winning tools for the best survey experience to our respondents, and reliable answers to you.