

**FINDINGS FROM**

# **THE MOBILE GAMING EXPERIENCE SURVEY**

December 7, 2011, Prepared by Ethan Kim

# 1. Introduction

Between December 5<sup>th</sup> and 6<sup>th</sup>, 2011, GameCircle Team conducted the first survey of “Mobile Gaming Experience.” The online survey link was sent to internal e-mail lists including “iPhone-users (n=1,279),” “iPad-users (n=131),” “Android-users (n=843),” “Windows-mobile (n=163),” “Kindle-Fire-users (n=130),” and “Blackberry-users (n=202).” 206 Amazon employees participated.

The survey goals were to answer the following questions:

- Who are mobile gamers?
- What are their common gaming behaviors?
- How do mobile gamers use their social gaming networks?
- What are their pain or delight points of using mobile social gaming networks?
- Is mobile gamers’ interest aligned with the features the team considers to offer for GameCircle?

The team plans to bring in 8 to 10 people from the survey participants for usability study on the most recent GameCircle mockups (study dates are TBA). The following phone tool icons are to be awarded to participants respectively for the survey and usability study.



## 2. Key Findings

The findings have been derived from the survey data, numerous graphs and charts.

- **91% (n=188) of participants reported that they play games on their mobile devices.** 56% play both phone and tablet (43% own both iPhone and iPad). Smart phones were the dominant devices for playing mobile games.
- **96% of mobile gamers (n=181) download less than 5 games per month** and 58% currently have less than 10 games on their mobile devices. 89% of mobile gamers have been playing mobile games less than 5 years. 66% are playing for a few hours every week or longer.
- **76% (n=142) of mobile gamers reported that “Word of mouth” was the top source of getting mobile game information** followed by “Websites and blogs (47%),” “Amazon Appstore (45%),” “Apple App Store (41%),” “Social network websites (33%).” 82% have downloaded a mobile game based on what their friends play or recommend.
- **About one-third of mobile gamers had a social gaming network account on their mobile devices.** “Game Center” and “OpenFeint” were the two primary networks.
- **Primary reasons of using mobile social gaming network were “Compare or view scores” and “Socialize with friends (e.g. invite or challenge friends, keep up with the games friends are playing).”** These two were also the top two best features of their mobile social gaming networks: “Compare or view scores” and “Access friends list.”
- **Top worst features of mobile social gaming network were “Hard to link with friends” and “Too much overhead.”** “Unfriendly UI” and “Annoying features” followed.
- Mobile gamers who reported they had social gaming network accounts rated the following social gaming network features based on usage frequency and in order of importance:

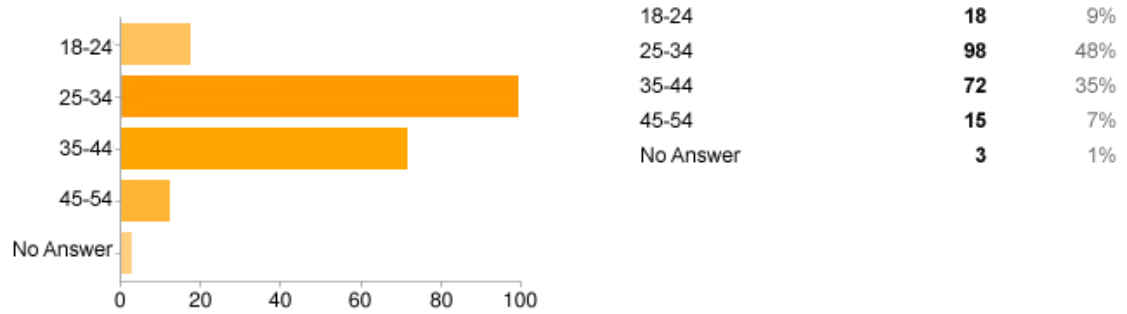
| Use Frequently / Important   | Use Sparsely / Important  | Use Sparsely / Not Important   |
|--|---|--|
| <p><b>View friends’ games</b><br/> <b>Compare scores</b><br/> <b>View rankings</b><br/> <b>View achievements</b></p> | <p><b>Invite friends to games</b><br/> <b>Recommend games</b><br/> <b>Manage friends</b><br/> <b>View friends’ status</b><br/> <b>Read friends’ activities</b><br/> <b>Discover new games</b></p> | <p>Send messages<br/> Post comments<br/> Check in<br/> Get gameplay help<br/> Manage profile info<br/> Read game news<br/> Update your status<br/> Chat with friends</p> |

- **Top features that mobile gamers are interested in are “Sync games across devices (82%),” “See what games friends buy and play (67%),” and “Invite friends to try out your games (56%).**

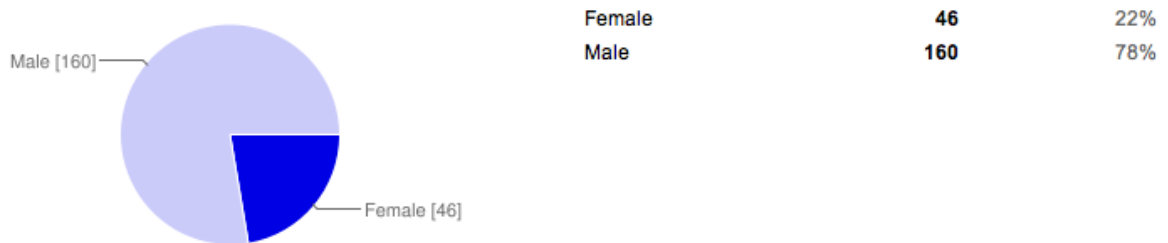
# 3. Demographics

Participants were asked basic questions about age, gender, and job title. “Engineer” was the dominant job title group (about 44%), as internal researches often result in a skewed job group ratio.

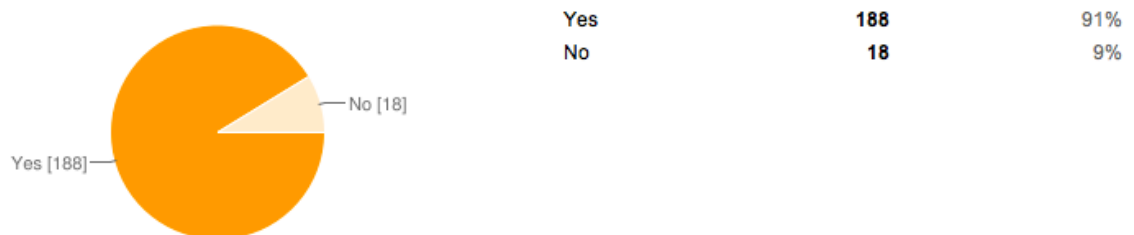
## 3.1 Age



## 3.2 Gender

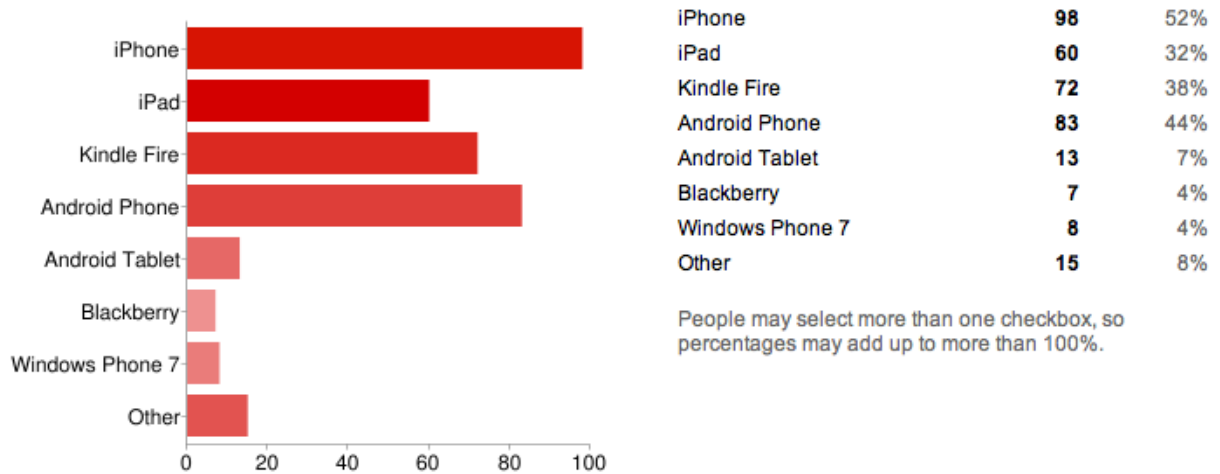


**3.3 Most participants were mobile gamers.** When participants answered “No” to the question “Do you play games on your mobile device?” the survey ended.

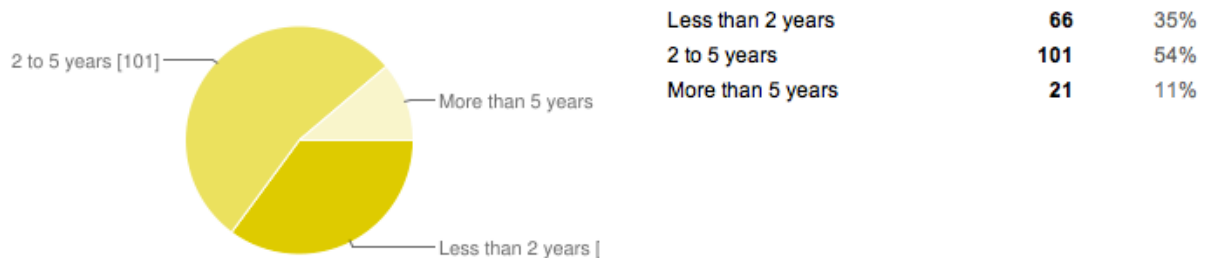


## 4. Mobile Gamers

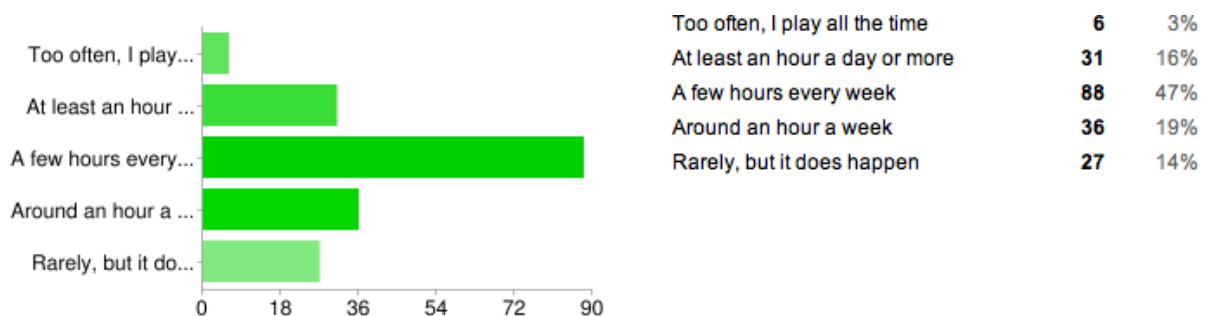
**4.1 56% (n=116) of participants play games on both mobile phone and tablet.** 43% had both iPhone and iPad, 17% had both Android phone and Android tablet including Kindle Fire. 5% had both Android phone and iPad.



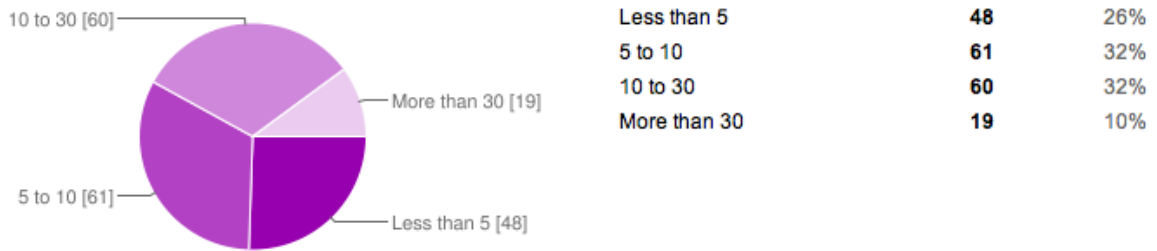
**4.2 Most participants (82%) have been playing mobile games less than 5 years.**



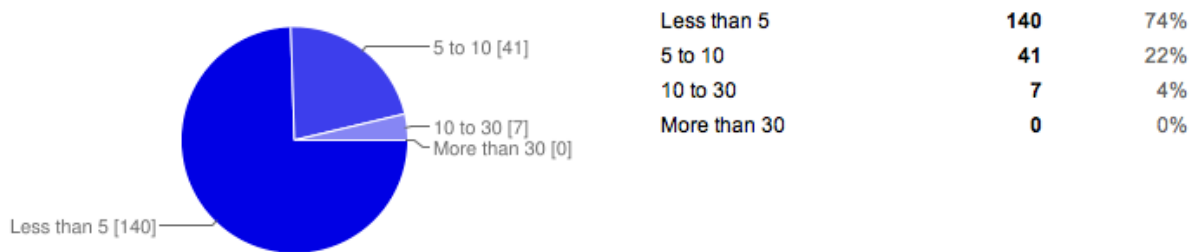
**4.3 66% are playing games for a few hours every week or longer.**



**4.4 Over half of mobile gamers (58%) have less than 10 games on their mobile devices.**



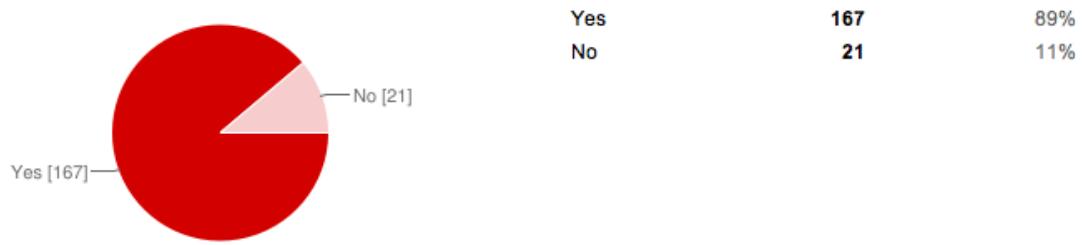
**4.5 Most mobile gamers (96%) download less than 5 games per month.**



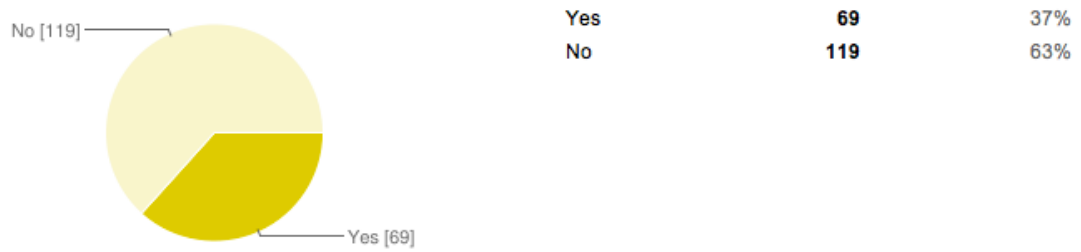
**4.6 Most mobile gamers (76%) reported that “Word of mouth” was the top source of getting mobile game information, followed by “Websites and blogs,” “Amazon Appstore,” “Apple App Store,” “Social network websites.”**



**4.7 Most mobile gamers have downloaded mobile games based on what their friends play or recommend.**

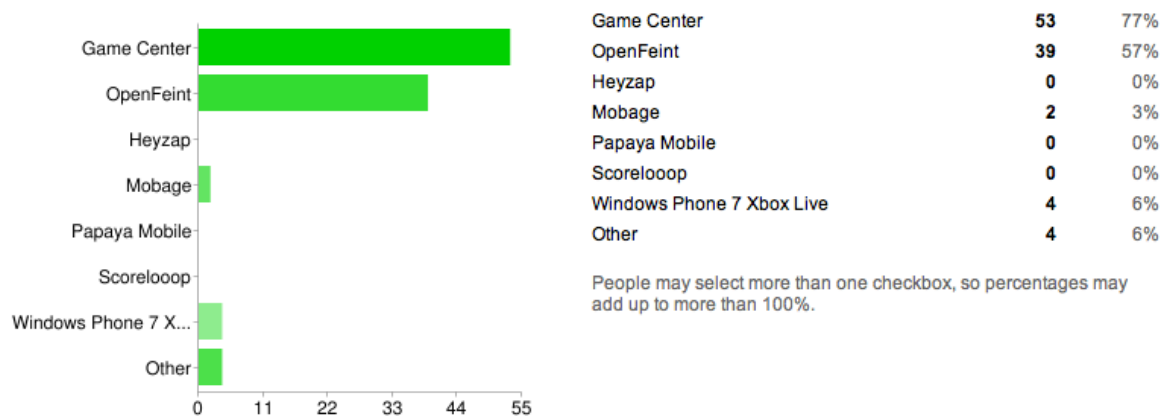


**4.8 Over one-third of mobile gamers have a social gaming network account on their mobile devices.**



# 5. Social Gaming Network

5.1 “Game Center” and “OpenFeint” were two primary social gaming networks. “Other” included “Crystal,” “Facebook (Scrabble integration),” and “Plus+.”



5.2 “Compare or view scores” and “Socialize with friends” were the top reasons for using mobile social gaming network. Participants were asked to list one to three primary reasons.

- a. **Compare or view scores (n=36)**
- b. **Socialize with friends (n=29)**
- c. Game discovery (n=3)
- d. Have an account but don’t use it (n=17)

5.3 Top best features of mobile social gaming network were “Compare or view scores” and “Access friend list.”

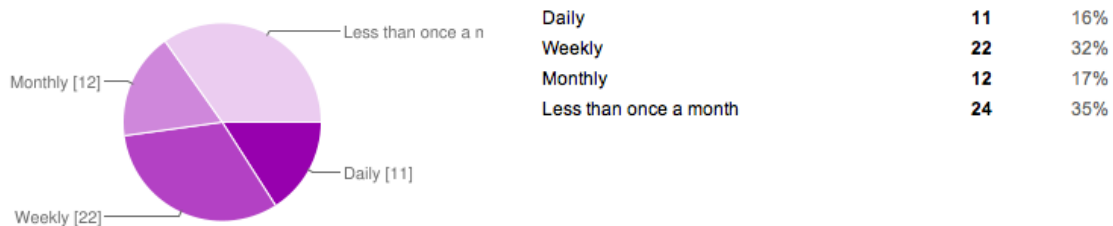
- a. **Compare / view scores (n=29)**
- b. **Access friend list (n=12)**
- c. No gameplay interruption (n=2)
- d. Clean UI (n=1)
- e. Access game list (n=1)
- f. Decorate avatar (n=1)
- g. Integration with Xbox (n=1)



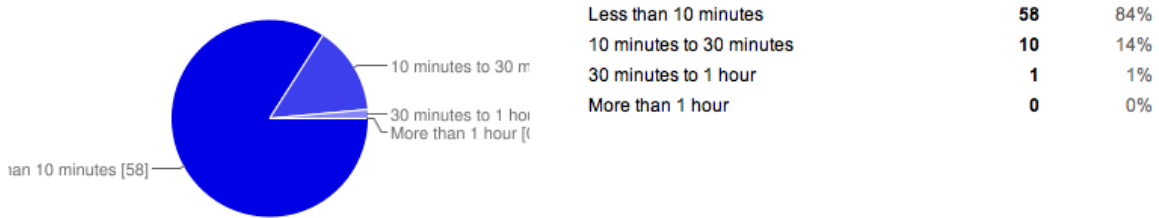
**5.4 Top worst features of mobile social gaming network were “Hard to link with friends” and “Too much overhead.” “Unfriendly UI” and “Annoying features” followed.**

- a. **Hard to link with friends (n=13)**  
*“Searching for friends is not easy.”*  
*“Lack of integration with existing accounts like Facebook and Foursquare.”*  
*“I do not like fragmentation – having multiple networks on a single device.”*
- b. **Too much overhead (n=9)**  
*“Signing-in eats up too much time when starting up the game app.”*  
*“I want it to auto-login.”*  
*“Some games require you to sign up before you can get to playing.”*
- c. **Unfriendly UI (n=7)**  
*“Game Center has terrible UI.”*  
*“The user interface is horrible.”*
- d. **Annoying features (n=4)**  
*“OpenFeint has annoying message boards and newsfeed.”*  
*“Unwanted gaming invites.”*  
*“Too much focus on friends. I just want world scores.”*
- e. **Privacy concern (n=3)**  
*“The threat of some shady company doing who-knows-what with my identity and data.”*  
*“I don’t want to post my games on social networks.”*
- f. **Connectivity (n=2)**  
*“Sometimes too slow.”*
- g. **Fake scores (n=2)**  
*“The high scores are so outrageous that cheating is the only way they make sense.”*
- h. **No interest at all (n=2)**  
*“I have no interest in the social gaming network.”*
- i. **Update issues (n=2)**  
*“Doesn’t always update properly.”*

**5.5 Only 16% access their social gaming networks daily.**



**5.6 Most spend less than 10 minutes on their mobile social gaming network per visit.**

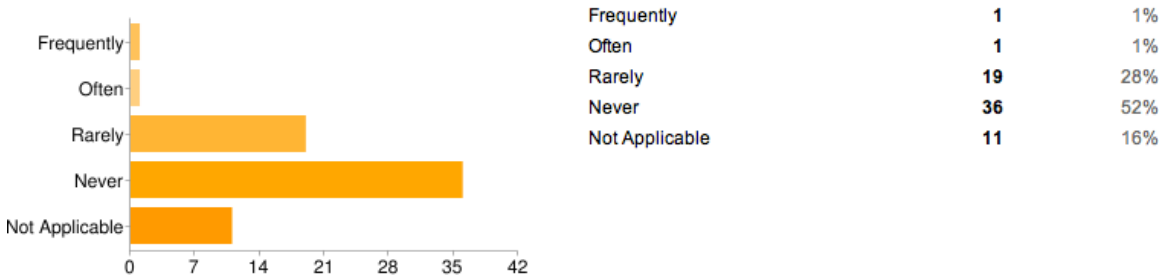


**5.7 Mobile gamers who reported they had mobile social gaming network accounts were asked to rate the following features based on their usage frequency and then separately asked to rate the same features in order of importance.**

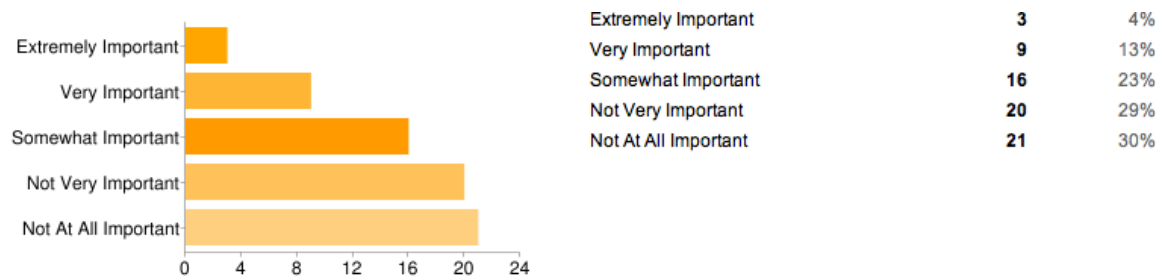
**Send messages**

Over half rarely or never “send messages” and reported it is not an important feature.

*Usage frequency*



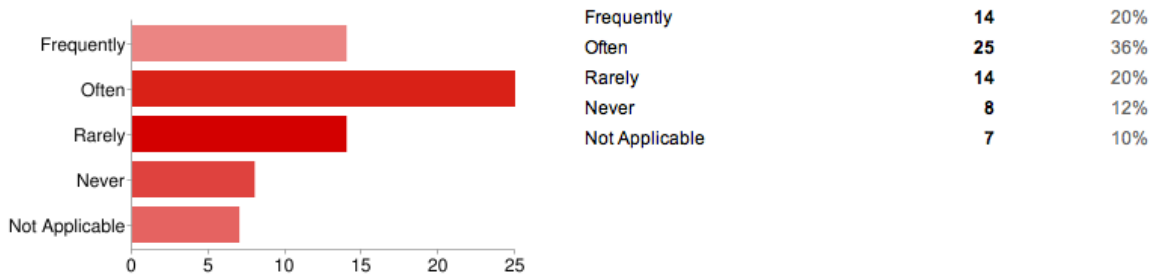
*Importance*



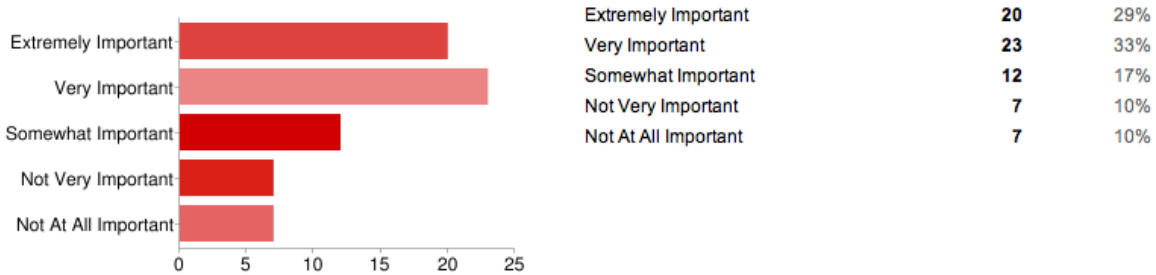
**Compare scores**

Over half frequently “compare scores” and reported it is an important feature.

*Usage frequency*



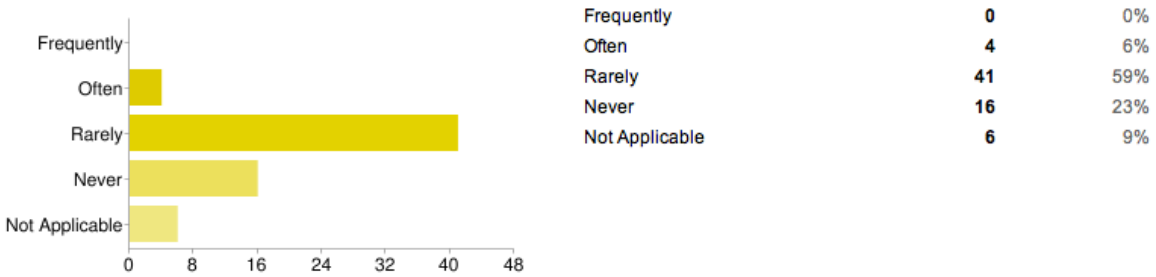
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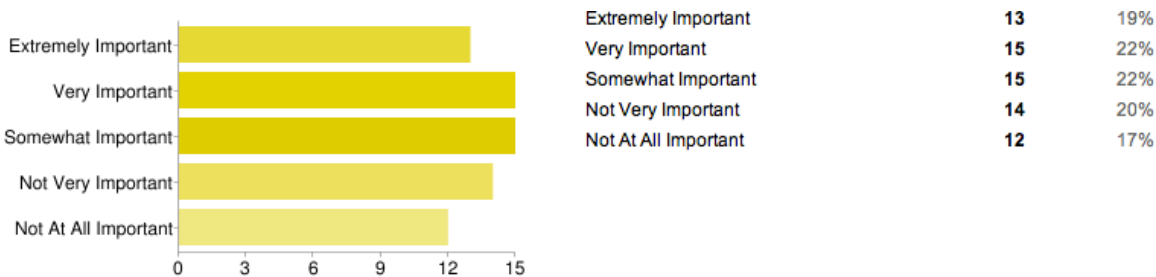
**Manage profile information**

Most rarely or never “manage profile information” but indicated it is an important feature.

*Usage frequency*



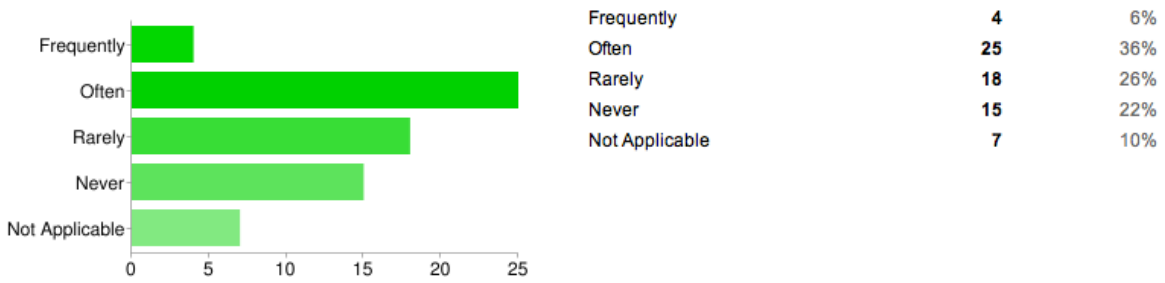
*Importance*



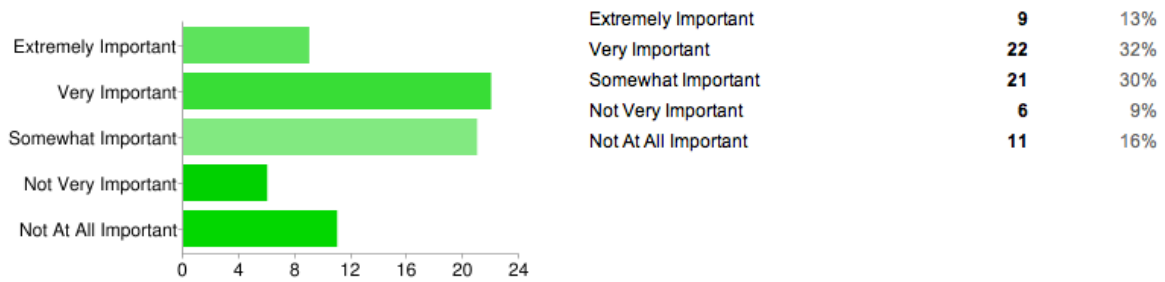
**View friends' games**

About half (42%) frequently or often “view friends’ games.” Most (75%) reported that it is an important feature.

*Usage frequency*



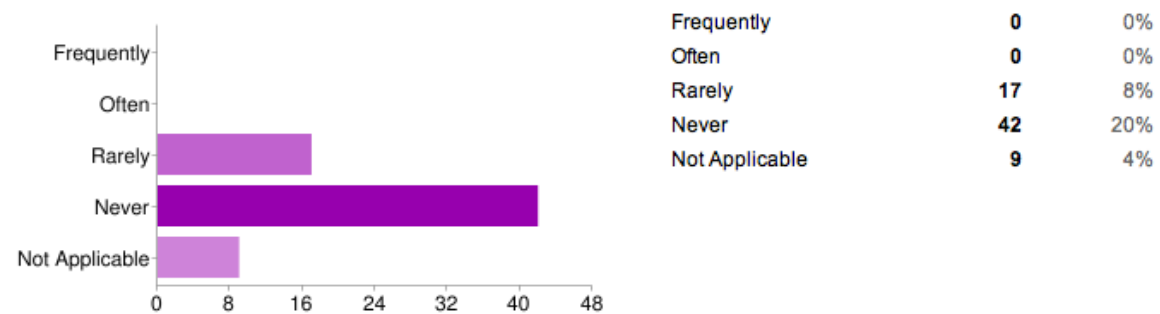
*Importance*



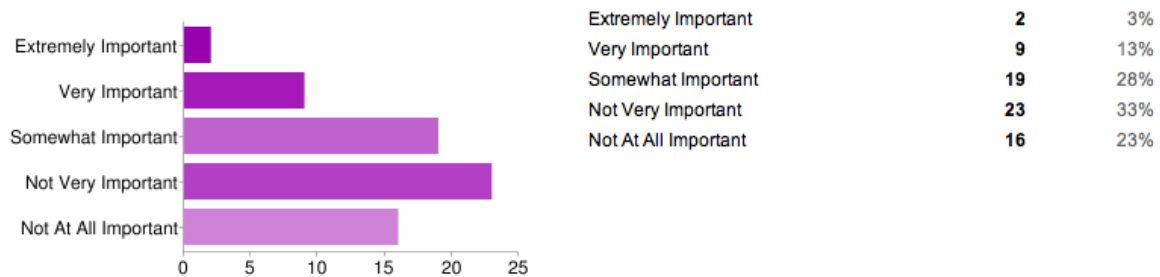
**Post comments**

42% rarely or never “post comments.” Over half (56%) reported that it is not an important feature.

*Usage frequency*



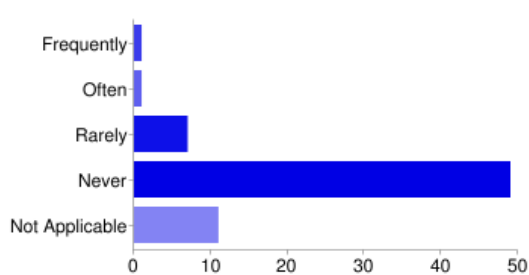
*Importance*



### Check in (let friends know where you are)

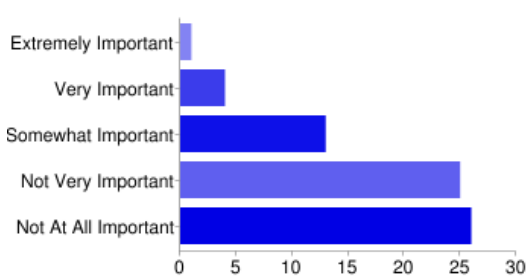
Most never “check in” and reported it is not an important feature.

#### Usage frequency



|                |    |     |
|----------------|----|-----|
| Frequently     | 1  | 1%  |
| Often          | 1  | 1%  |
| Rarely         | 7  | 10% |
| Never          | 49 | 71% |
| Not Applicable | 11 | 16% |

#### Importance

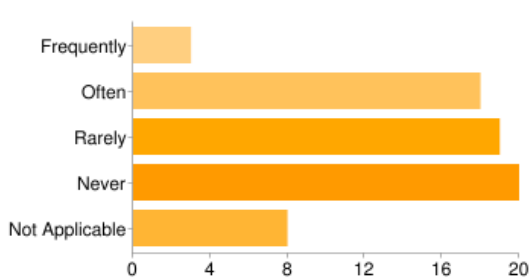


|                      |    |     |
|----------------------|----|-----|
| Extremely Important  | 1  | 1%  |
| Very Important       | 4  | 6%  |
| Somewhat Important   | 13 | 19% |
| Not Very Important   | 25 | 36% |
| Not At All Important | 26 | 38% |

### Invite friends to games

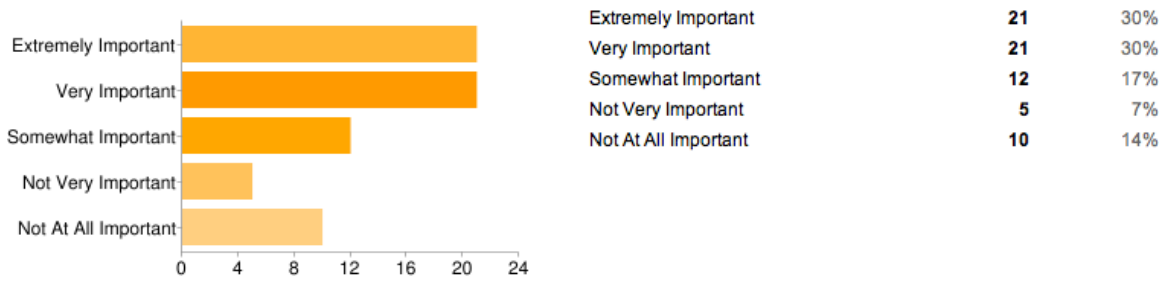
While usage frequency of “inviting friends to games” was evenly divided, most (77%) reported that it is an important feature.

#### Usage frequency



|                |    |     |
|----------------|----|-----|
| Frequently     | 3  | 4%  |
| Often          | 18 | 26% |
| Rarely         | 19 | 28% |
| Never          | 20 | 29% |
| Not Applicable | 8  | 12% |

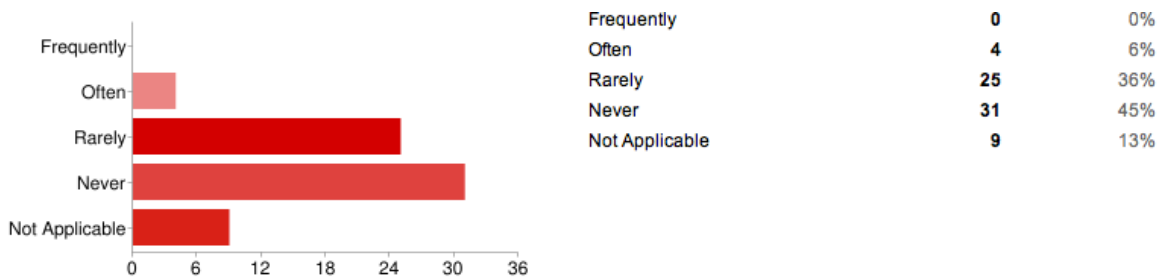
#### Importance



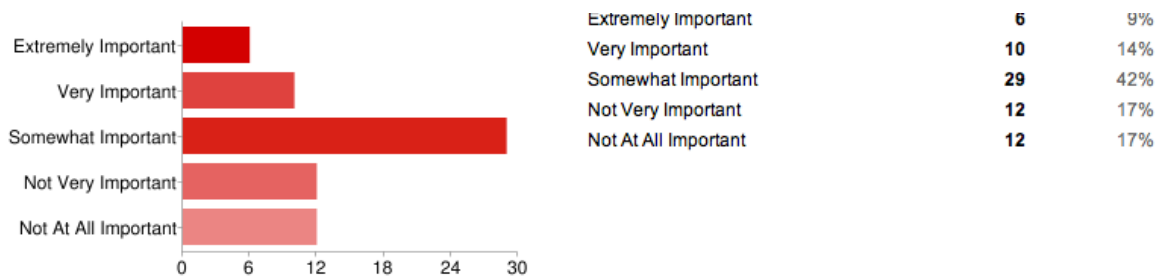
### Recommend games

While most (81%) rarely or never “recommend games,” 65% reported that it is an important feature.

#### Usage frequency



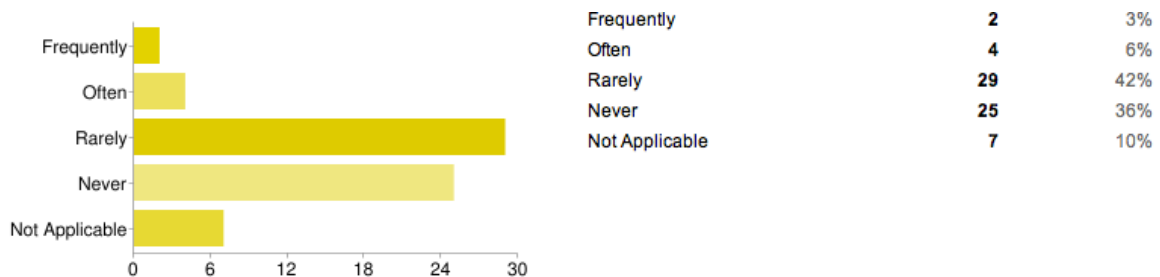
#### Importance



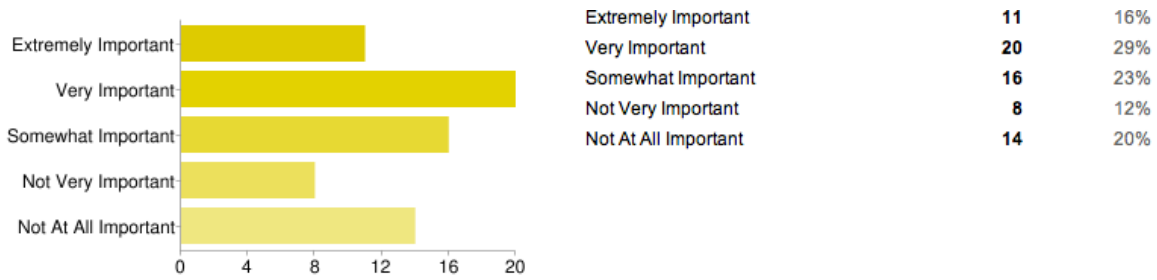
### Manage friends

Most (78%) rarely or never “manage friends” but 68% reported it is an important feature.

#### Usage frequency



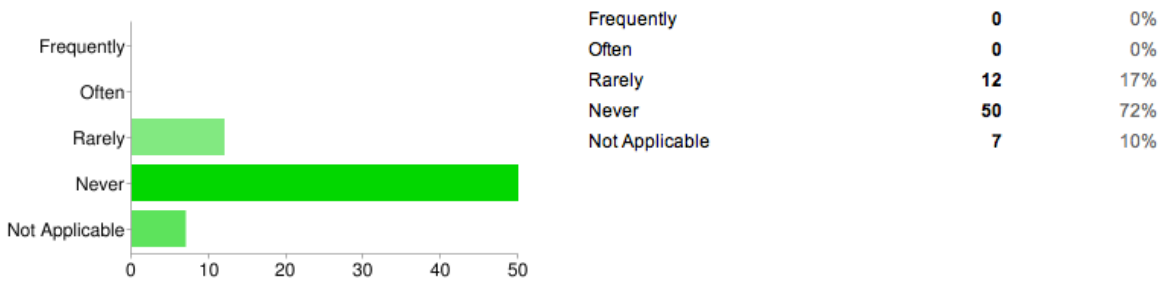
*Importance*



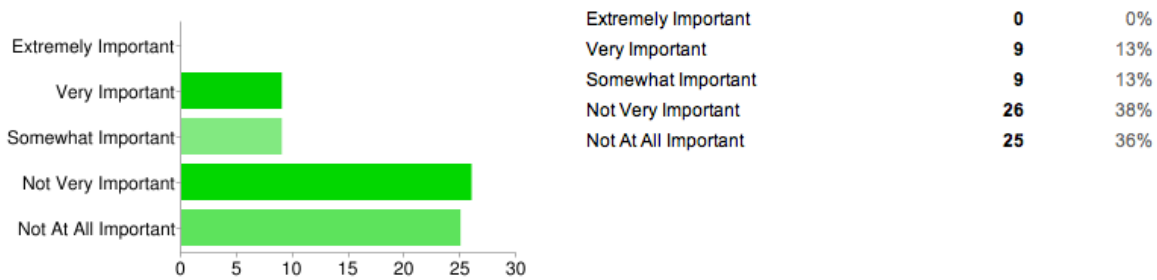
**Get gameplay help**

Most never “get gameplay help” and reported it is not an important feature.

*Usage frequency*



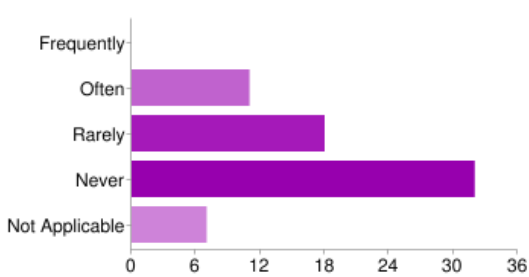
*Importance*



**View friends’ status**

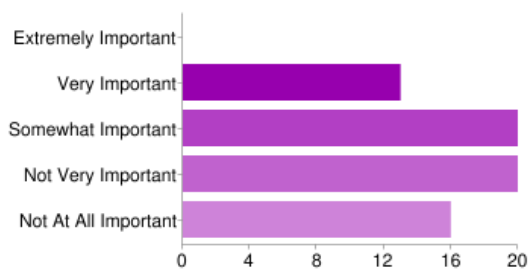
Most (72%) rarely or never “view friends’ status” but over half (58%) reported it is an important feature.

*Usage frequency*



|                |           |     |
|----------------|-----------|-----|
| Frequently     | <b>0</b>  | 0%  |
| Often          | <b>11</b> | 16% |
| Rarely         | <b>18</b> | 26% |
| Never          | <b>32</b> | 46% |
| Not Applicable | <b>7</b>  | 10% |

### Importance

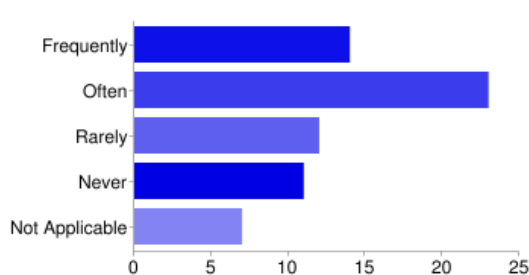


|                      |           |     |
|----------------------|-----------|-----|
| Extremely Important  | <b>0</b>  | 0%  |
| Very Important       | <b>13</b> | 19% |
| Somewhat Important   | <b>20</b> | 29% |
| Not Very Important   | <b>20</b> | 29% |
| Not At All Important | <b>16</b> | 23% |

### View rankings

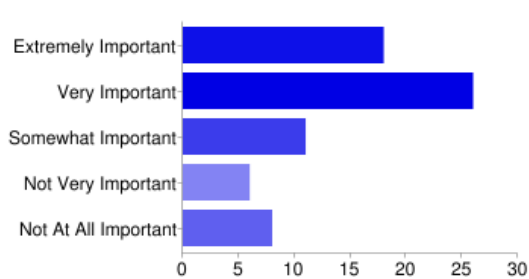
Over half (53%) frequently or often “view rankings” and most (80%) reported that it is an important feature.

### Usage frequency



|                |           |     |
|----------------|-----------|-----|
| Frequently     | <b>14</b> | 20% |
| Often          | <b>23</b> | 33% |
| Rarely         | <b>12</b> | 17% |
| Never          | <b>11</b> | 16% |
| Not Applicable | <b>7</b>  | 10% |

### Importance



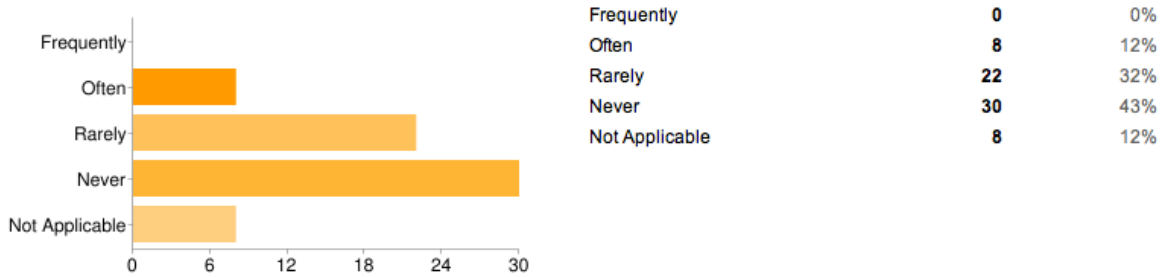
|                      |           |     |
|----------------------|-----------|-----|
| Extremely Important  | <b>18</b> | 26% |
| Very Important       | <b>26</b> | 38% |
| Somewhat Important   | <b>11</b> | 16% |
| Not Very Important   | <b>6</b>  | 9%  |
| Not At All Important | <b>8</b>  | 12% |

### Read friends' activities

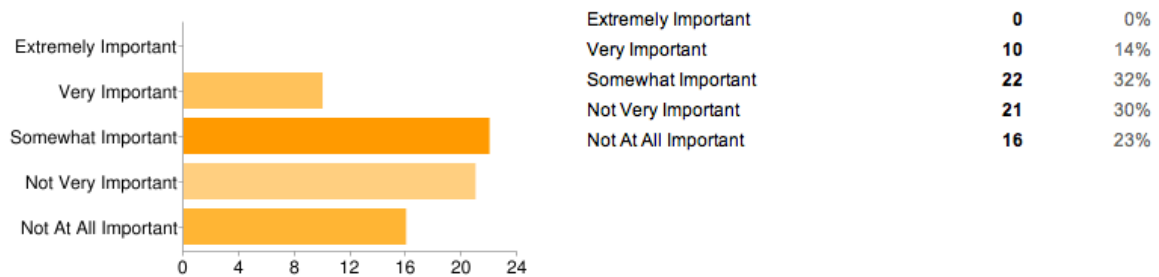


Most (75%) rarely or never “read friends’ activities.” About half (46%) agreed that it is an important feature while the other half (53%) disagreed.

*Usage frequency*



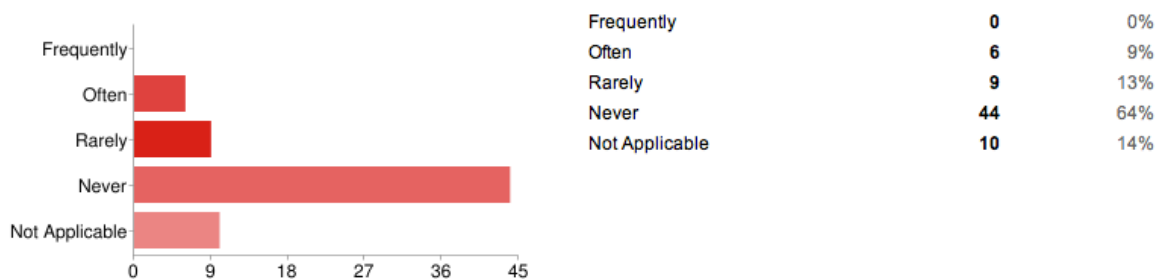
*Importance*



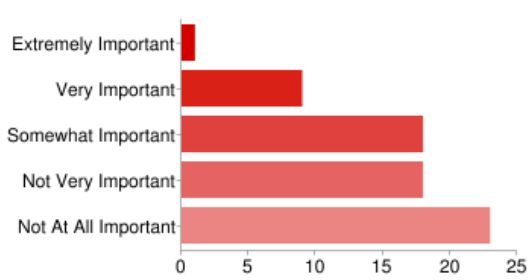
**Read game news**

Most (77%) rarely or never “read game news” on their mobile social gaming network. 59% reported that it is not an important feature.

*Usage frequency*



*Importance*

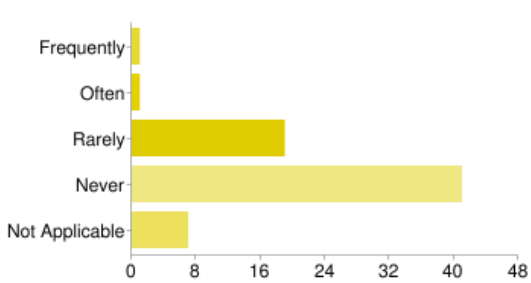


|                      |           |     |
|----------------------|-----------|-----|
| Extremely Important  | <b>1</b>  | 1%  |
| Very Important       | <b>9</b>  | 13% |
| Somewhat Important   | <b>18</b> | 26% |
| Not Very Important   | <b>18</b> | 26% |
| Not At All Important | <b>23</b> | 33% |

### Update your status

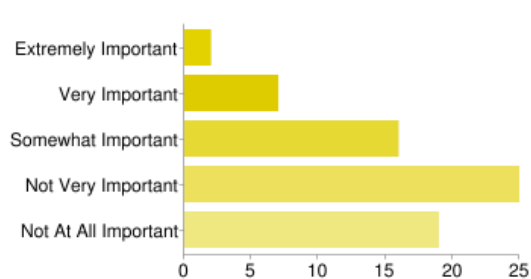
Most (88%) rarely or never “update their status.” 64% reported that it is not an important feature.

#### Usage frequency



|                |           |     |
|----------------|-----------|-----|
| Frequently     | <b>1</b>  | 1%  |
| Often          | <b>1</b>  | 1%  |
| Rarely         | <b>19</b> | 28% |
| Never          | <b>41</b> | 59% |
| Not Applicable | <b>7</b>  | 10% |

#### Importance

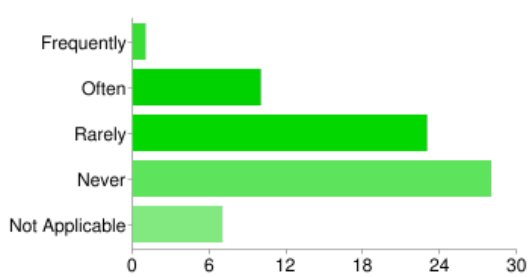


|                      |           |     |
|----------------------|-----------|-----|
| Extremely Important  | <b>2</b>  | 3%  |
| Very Important       | <b>7</b>  | 10% |
| Somewhat Important   | <b>16</b> | 23% |
| Not Very Important   | <b>25</b> | 36% |
| Not At All Important | <b>19</b> | 28% |

### Discover new games

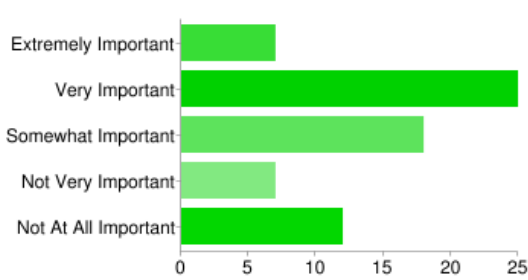
Most (74%) rarely or never “discover new games” on their mobile social gaming network. However, most (72%) agreed that it is an important feature.

#### Usage frequency



|                |           |     |
|----------------|-----------|-----|
| Frequently     | <b>1</b>  | 1%  |
| Often          | <b>10</b> | 14% |
| Rarely         | <b>23</b> | 33% |
| Never          | <b>28</b> | 41% |
| Not Applicable | <b>7</b>  | 10% |

### Importance

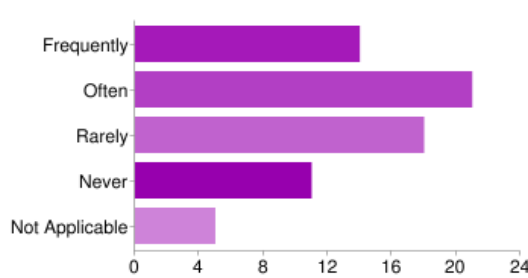


|                      |           |     |
|----------------------|-----------|-----|
| Extremely Important  | <b>7</b>  | 10% |
| Very Important       | <b>25</b> | 36% |
| Somewhat Important   | <b>18</b> | 26% |
| Not Very Important   | <b>7</b>  | 10% |
| Not At All Important | <b>12</b> | 17% |

### View achievements

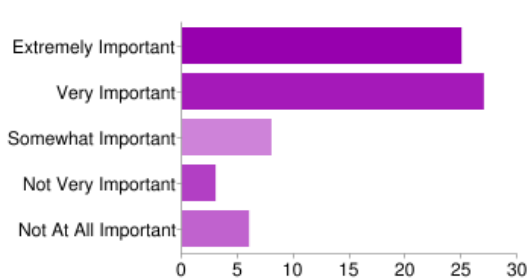
50% of mobile gamers who have social gaming network accounts frequently or often “view achievements” and most (87%) reported that it is an important feature.

### Usage frequency



|                |           |     |
|----------------|-----------|-----|
| Frequently     | <b>14</b> | 20% |
| Often          | <b>21</b> | 30% |
| Rarely         | <b>18</b> | 26% |
| Never          | <b>11</b> | 16% |
| Not Applicable | <b>5</b>  | 7%  |

### Importance

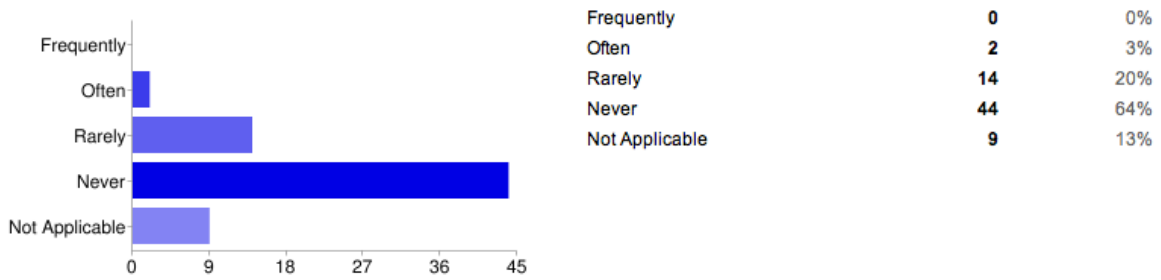


|                      |           |     |
|----------------------|-----------|-----|
| Extremely Important  | <b>25</b> | 36% |
| Very Important       | <b>27</b> | 39% |
| Somewhat Important   | <b>8</b>  | 12% |
| Not Very Important   | <b>3</b>  | 4%  |
| Not At All Important | <b>6</b>  | 9%  |

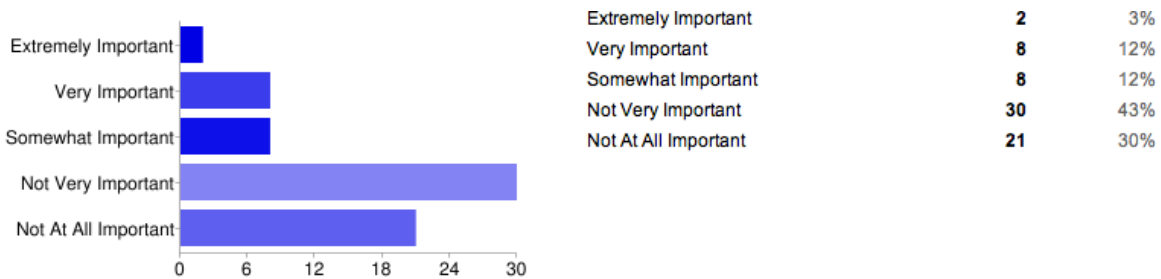
### Chat with friends

Most rarely or never “chat with friends” and reported it is not an important feature.

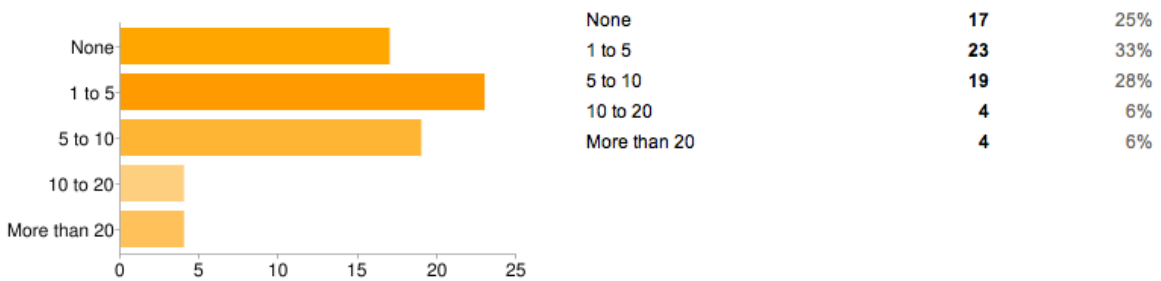
*Usage frequency*



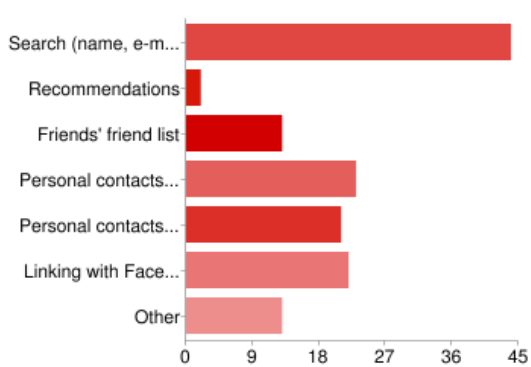
*Importance*



**5.7 Most (86%) had less than 10 friends in their mobile social gaming networks.**



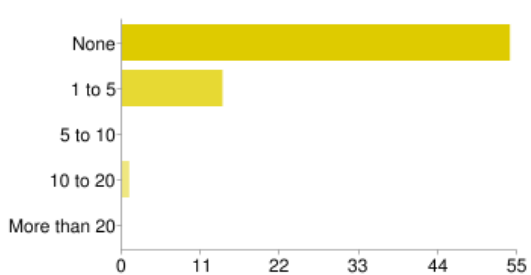
**5.8 Top way of finding friends in their mobile social gaming network was “Search name or e-mails).**



| Method   | Count | Percentage |
|--|-------|------------|
| Search (name, e-mail)                                  | 44    | 64%        |
| Recommendations  | 2     | 3%         |
| Friends' friend list                                   | 13    | 19%        |
| Personal contacts from your e-mail accounts            | 23    | 33%        |
| Personal contacts from your mobile devices             | 21    | 30%        |
| Linking with Facebook or other social network websites | 22    | 32%        |
| Other  | 13    | 19%        |

People may select more than one checkbox, so percentages may add up to more than 100%.

### 5.9 Most reported that they have not added friends to their mobile social gaming networks without actually knowing who they are.



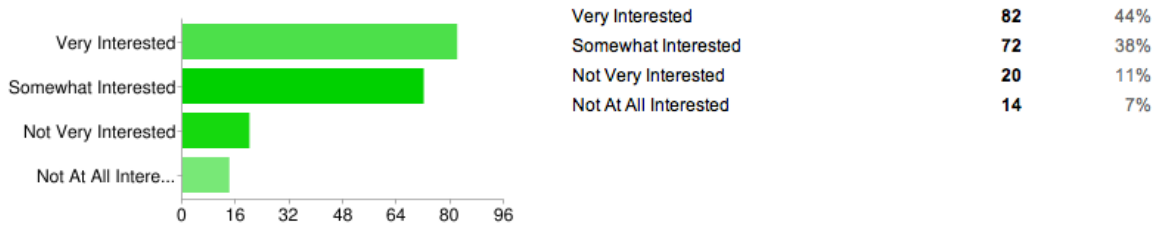
| Category     | Count | Percentage |
|--------------|-------|------------|
| None         | 54    | 78%        |
| 1 to 5       | 14    | 20%        |
| 5 to 10      | 0     | 0%         |
| 10 to 20     | 1     | 1%         |
| More than 20 | 0     | 0%         |

# 6. Feature Preferences

6.1 188 participants who play mobile games were asked to rate the following new features based on their interest.

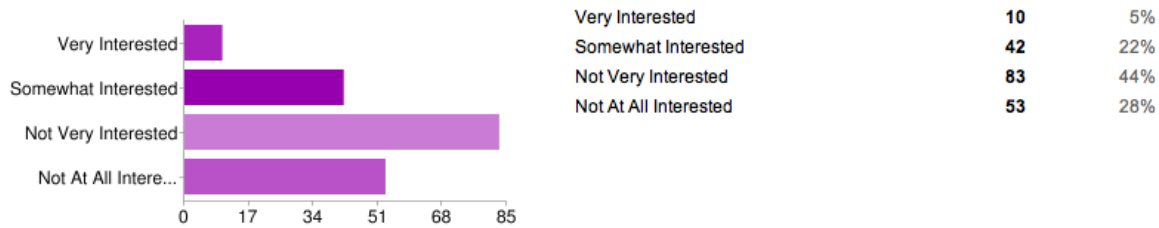
## Sync games across devices

Most (82%) were interested in “Sync games across devices.”



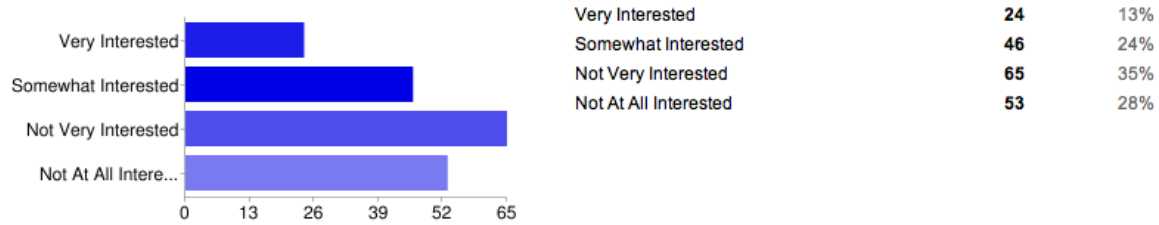
## Broadcast gameplay

Only 27% were interested in “Broadcast gameplay.”



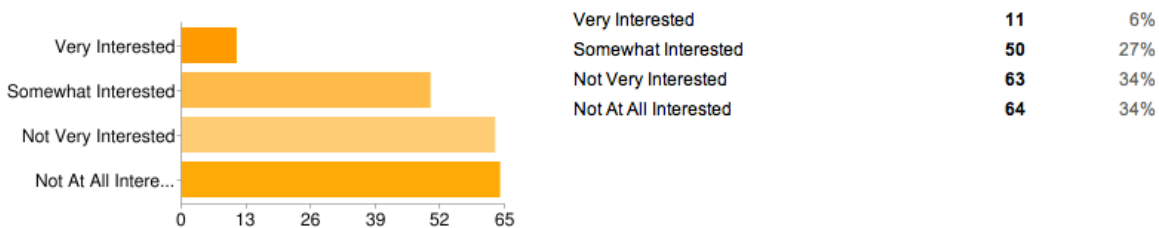
## Brag game scores

37% were interested in “Brag game scores.”



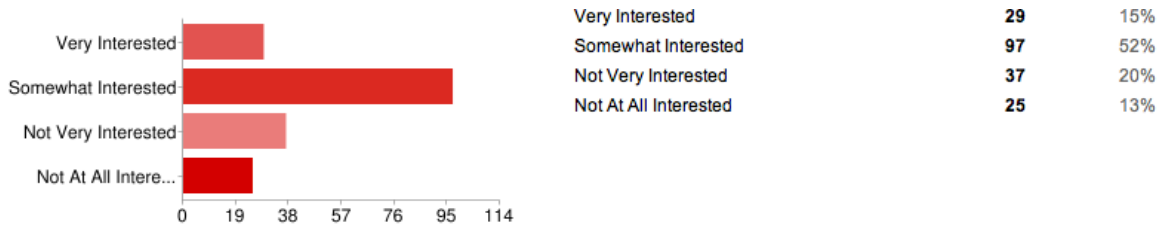
## Access to social network during gameplay

33% were interested in “Access to social network during gameplay.”



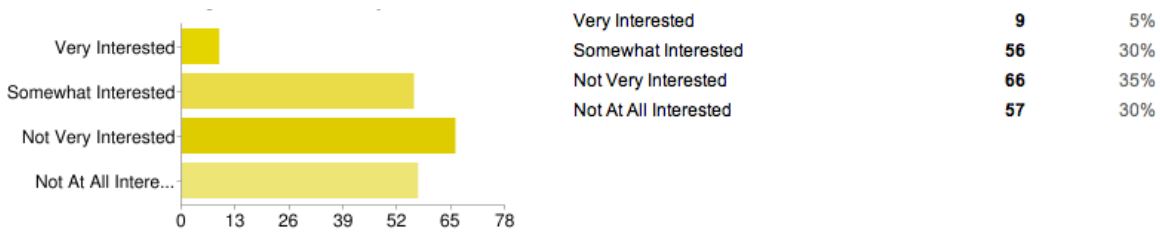
### See what games friends buy and play

67% were interested in "See what games friends buy and play."



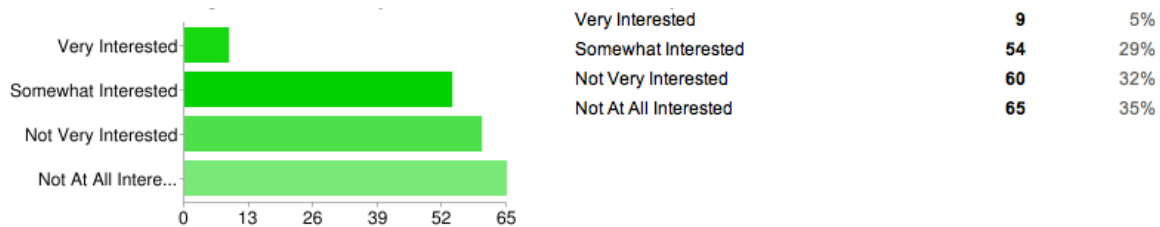
### Decorate avatar

35% were interested in "Decorate avatar."



### Earn virtual currency

34% were interested in "Earn virtual currency."



### Invite friends to try out your games

56% were interested in "Invite friends to try out their games."

