

# Mom's Got Game.

Understanding the growing population of Gamer Moms

Published by Activision Blizzard Media, May 2020



ACTIVISION | BLIZZARD  
M E D I A

## CONTENTS

<b>1. Introduction</b>	<b>3</b>
a. Mom's Got Game	4
b. Research methodology and scope	5
<b>2. Key Takeaways</b>	<b>7</b>
a. Most moms are gamers	10
b. Gamer moms are content consumption machines	15
c. Gaming delivers moms value and positivity	19
d. Gamer moms are primed for brands	23
<b>3. Conclusion</b>	<b>30</b>
a. Gamer moms are the next level	31
b. About Activision Blizzard Media	32

MOM'S GOT GAME

# Introduction.



## INTRODUCTION

# Mom's Got Game.

The numbers in gaming are staggering: a global audience of over two billion and an industry worth more than \$160 billion.<sup>1</sup> But contrary to popular opinion, gaming is not purely dominated by young males. A significant portion of the audience is made up of women with children, a segment that until now has remained largely unstudied.

Historically, women gamers, and especially moms, have been written out of the narrative around gaming. The discourse around women and gaming has typically focused on mobile phones. This behavior, deemed casual gaming, has given the sense that women were not true "gamers". Images in the media reinforce that moms are a particular kind of player, usually women playing casual games in their down time. In these stories, their gaming was a novelty, and they certainly were not considered to be part of the broader gaming community.

Our research shows that gamer moms account for the majority of moms, with over two-thirds of moms gaming. Gamer moms represent the full spectrum of gamers, playing games on PC and console, in addition to mobile.

This highly valuable audience is at the center of the household. Gamer moms make decisions for the family, enjoy entertainment together and report feeling close with their children. They are desirable shoppers who love to discover new things and are receptive to relevant advertising, making them a key opportunity for brands.

This report takes a closer look at gamer moms, including their entertainment consumption, connectivity with their family, social influence and interaction with brands. It compares the behaviors of gamer moms to their non-gaming counterparts, while also analyzing the differences between moms who play on different platforms. The report challenges the industry to rethink the collective view and understanding of who gamers are today while showcasing the opportunity for brands to reach and connect with these economic powerhouses.

“ I have always been a gamer.”

- Mom of one, 46yrs, California, USA



## INTRODUCTION

# Research methodology and scope.

### Research Objectives

This consumer research project was aimed at better understanding gamer moms, including their attitudes and behaviors while exploring the opportunities to engage with them. Specifically, this report was designed to answer questions around their shopping and entertainment habits, purchasing power, role in the family unit, and explore how gamer moms are different from their non-gamer counterparts.

### Respondents & Methodology

To better understand the gamer mom audience, Activision Blizzard Media, in partnership with independent research agency Alter Agents, conducted a quantitative research study among 25-54 year-old women who have at least one child at home under the age of 18. Our work in this space has revealed a distinct set of insights for this audience that extends across the gaming vertical, as well as their sphere of influence, unique behaviors and habits.

The online-based study surveyed 4,002 gamer moms and 3,200 non-gamer moms, split equally across the United States, United Kingdom, France, and Germany. The methodology, questionnaire and analysis were conducted by Alter Agents, based out of the United States.

A supplementary sample of 26,399 Moms and 10,242 Dads was also collected in order to estimate gaming incidence across the four markets. This sample is only referenced on pages 8 and 11 of this report.

	US	UK	Germany	France
<b>Gamer Moms</b> (Play mobile or video games)	n=1000	n=1000	n=1002	n=1000
<b>Non-Gamer Moms</b> (Do not play mobile or video games)	n=800	n=800	n=800	n=800

## Definitions of Key Terms

### Moms

Female respondents aged 25-54 with at least one child under 18 in the household

### Gamer moms

Moms who play video games across mobile, tablet, PC or console

### Non-gamer moms

Moms who do not play video games across mobile, tablet, PC or console

### Mobile-only moms

Gamer moms who only play video games across mobile or tablet

### Multi-platform moms

Gamer moms who play on mobile and another platform

## Statistics

Where comparisons have been made between gamer moms and non-gamer moms, percentages were tested for statistical significance at  $p < .05$  and all comparisons were found significant with 95% confidence.

MOM'S GOT GAME

Key takeaways.



## KEY TAKEAWAYS

### Most moms are gamers.

Gamer moms account for the majority of all moms. In the four markets surveyed, over two-thirds of moms reported engagement with video games, playing across mobile, tablet, console and PC, making gaming a powerful platform to reach this influential consumer group.

TOTAL:



In the four markets surveyed, over two-thirds of moms reported engagement with video games

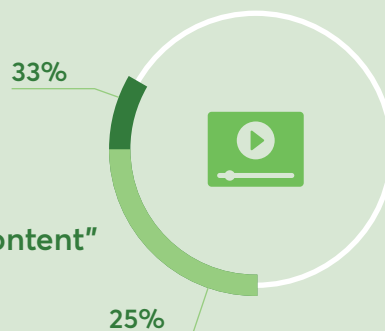
### Gamer Moms are content consumption machines.

These highly-engaged enthusiasts watch more entertainment, engage more with social media, and are more likely to be content advocates than non-gamer moms.

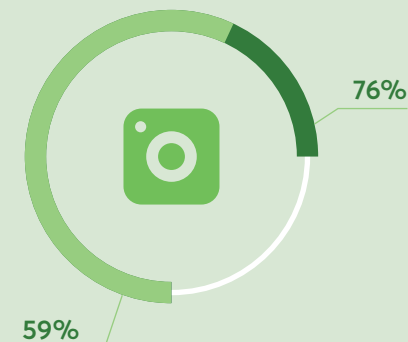
Paid for a streaming/entertainment subscription in the past 12 months



"I regularly binge-watch content"



Use social media daily



● Gamer Moms ● Non-Gamer Moms

Footnote:

Total n=26,399: Gamer Moms n=4,002, Non-Gamer Moms n=3,200



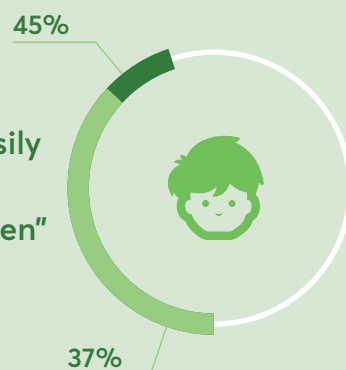
## Gaming delivers moms value and positivity.

Gamer moms view entertainment, including gaming, as an important and positive part of their lives compared to their non-gaming mom counterparts. They are also more likely to feel they can easily relate to their children. For gamer moms, gaming is a connective tissue in their relationships with their kids.



Believe entertainment improves their mood

"I can easily relate to my children"



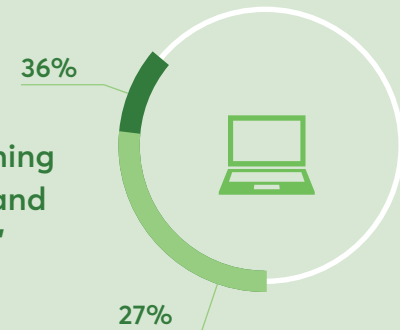
## Gamer Moms are primed for brands.

Gamer moms are more engaged with products and brands on social media, and they are more likely to recommend them to their friends and family. These mega-consumers are also at the center of household purchasing decisions.



Offer advice to friends on purchases

"I love researching new products and entertainment"



● Gamer Moms ● Non-Gamer Moms

## INSIGHT ONE

Most moms  
are gamers.



## MOST MOMS ARE GAMERS

# The gamer stereotype is inaccurate.

While 71% of moms are playing video games, only 48% of mom gamers actually describe themselves as gamers. This lack of self-identification has led to the perception of gaming as an activity enjoyed solely by men, which is both outdated and inaccurate.

Gamer moms account for almost half of parents who game. While dad gamers outpace their female counterparts, gamer moms are quickly closing the gap.

### Footnote:

Total Dads n=10,242, Total Moms n=26,399; US Dads n=1,822, US Moms n=5,222; UK Dads n= 2,868, UK Moms n=7,379; France Dads n=2,807, France Moms n=6,858; Germany Dads n=2,745, Germany Moms n=6,940  
Upweighted sample leveraged for global incidence reporting.

Gender  
breakdown  
of gamer  
parents



Moms



Dads

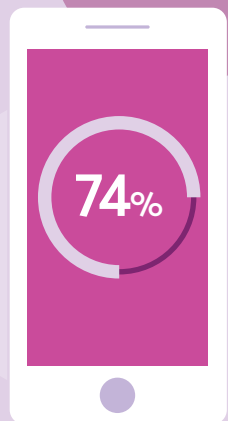


## Moms play on different platforms

The growth of mobile gaming has increased the accessibility of gaming for women, lowering the barrier to entry by removing the need to purchase additional hardware to play and making it easy to discover new titles. Over 90% of gamer moms play mobile games at least weekly, and about 74% play mobile games daily.

However, focusing exclusively on mobile gaming doesn't tell the full story, as gamer moms are not only playing on their phones. The majority of gamers are playing on mobile and at least one other platform (console or PC). They're spending many hours each week playing games, including big Triple-A action<sup>2</sup> and MMORPG<sup>3</sup> titles, and 61% of these multi-platform moms self-identify as gamers. Except for moms in Germany, almost half of gamer moms have been playing games for 10 years or more.

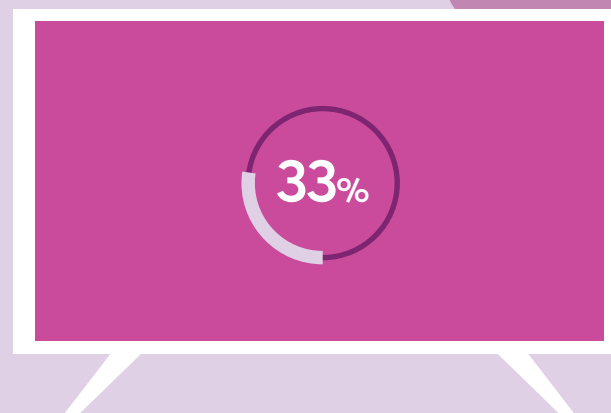
Gamer moms  
playing mobile  
games daily



Gamer moms  
playing PC/laptop  
games daily



Gamer moms  
playing console  
games daily



### Footnote:

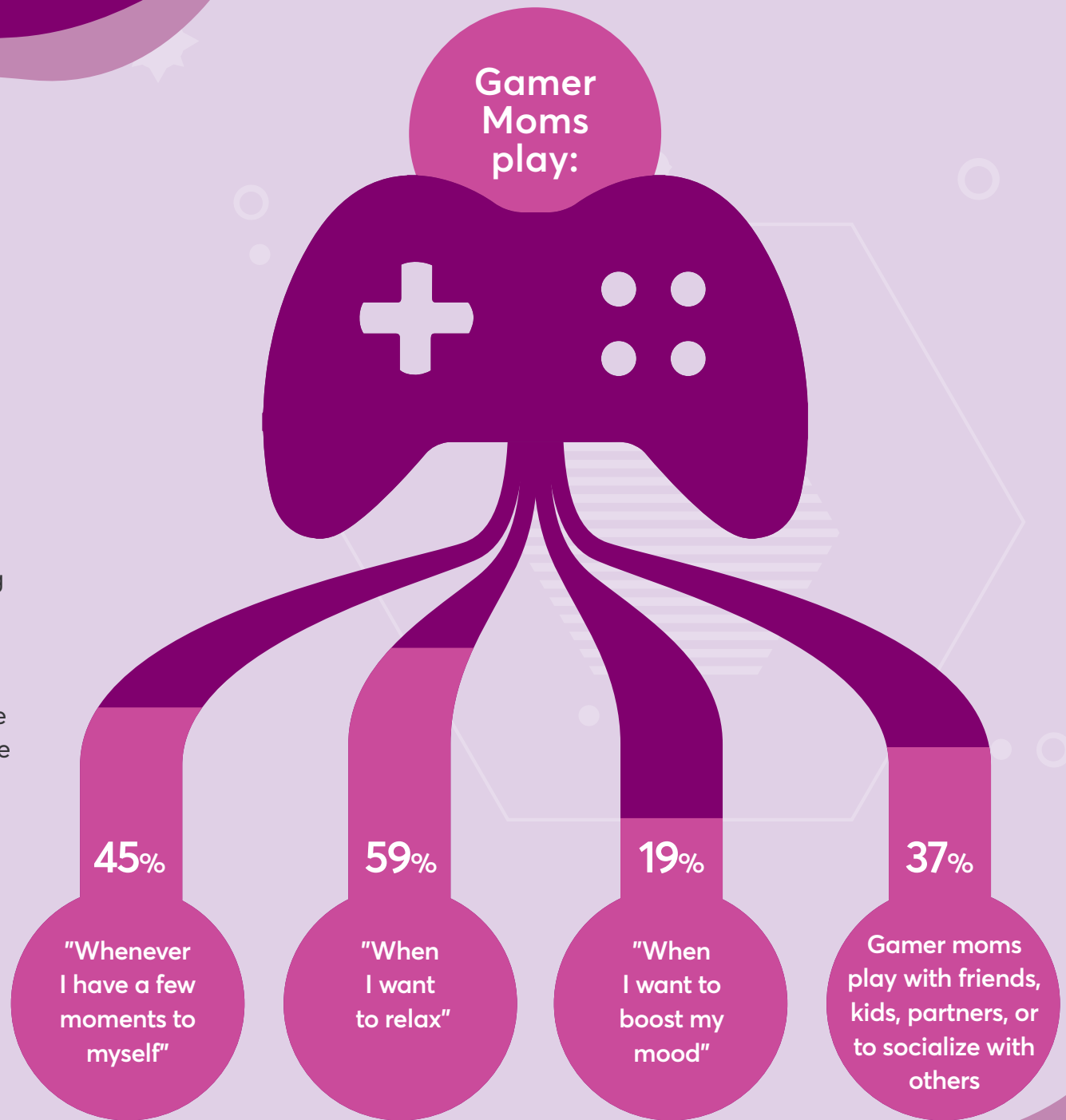
Gamer Moms n=4,002; Multi-platform Moms n=2,093

<sup>2</sup> Video games produced and distributed by a mid-sized or major publisher with higher development and marketing budgets

<sup>3</sup> Massively multiplayer online role-playing games

## The gamer mom audience is diverse

Just as there is no typical 'gamer', there is no typical 'gamer mom.' The segment is made up of a rich kaleidoscope of women with different motivations and preferences for games. While some moms, particularly mobile-only moms, see gaming as a mostly solitary activity which they enjoy playing on their phone, others view it as a social activity that helps them stay close to their family and friends. Multi-platform moms are connected to other players inside and outside of their homes, which makes them an influential target for advertising partners.



**Footnote:**  
Gamer Moms n=4,002

# When Gamer Moms started playing video games

Less than  
10 years ago



More than  
10 years ago



All Gamer  
Moms



Mobile-only  
Moms



Multi-platform  
Moms



United  
States



United  
Kingdom



France



Germany



“

I play every day mainly because it's fun. It's one of my favorite hobbies. I've been playing video games since I was little. I enjoy seeing how games have developed and improved over the years. Video games help me relax especially when I'm stressed out.”

- Mom of two, 27yrs, Kentucky, USA

**Footnote:**

Total n=4,002; US n=1,000, UK n=1,000, France n=1,000, Germany n=1,002; Multi-platform Moms n=2,093; Mobile-only Moms n=1,343

## INSIGHT TWO

Gamer Moms  
are content  
consumption  
machines.



## CONTENT CONSUMPTION MACHINES

# Gamer Moms like to be entertained.

Beyond their gaming passions, this content-hungry audience consumes more entertainment and engages more with social media than non-gamer moms.

Among gamer moms, it's those that play across a variety of platforms that are the biggest content consumers. Even in comparison to mobile-only moms, multi-platform moms are 10% more likely to regularly binge watch content and 13% more likely to want access to entertainment from anywhere.

## Gamer Moms like the latest tech

Unsurprisingly, this love of entertainment means that they invest in entertainment technology. More gamer moms see entertainment technology as something they cannot live without than their non-gaming equivalents, and they are also more likely to have a streaming service subscription. Multi-platform moms are also more likely than mobile-only moms to keep up with the latest hardware, buying consoles and accessories as soon as they're released.

Gamer moms' appetite for entertainment doesn't end there. Their social media content consumption is 30% higher than non-gamer moms. And they're not only using major social media platforms more often but also posting more content. Video is the biggest driver of engagement within their two most used social platforms: YouTube and Facebook.

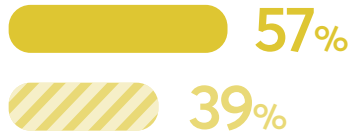
### Footnote:

Multi-platform Moms n=2,093; Mobile-only Moms n=1,343

Tested for statistical significance at  $p < .05$  and all comparisons were found significant with 95% confidence.

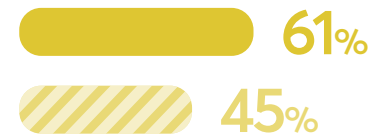


Pay for  
streaming  
services



Paid for a streaming/entertainment subscription in the past 12 months

Regularly watch  
streaming  
video



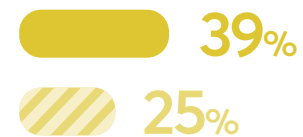
Use streaming services weekly or more often

Heavy social  
media users




Use social media daily

Use  
entertainment  
as a social  
conduit



Discuss entertainment with their friends

 Gamer Moms

 Non-Gamer Moms

**Footnote:**

Total n=7,202; Gamer Moms n=4,002, Non-Gamer Moms n=3,200

“ I consider [gaming] to be a form of entertainment/escapism akin to watching TV or reading a book.”

- Mom of one, 39yrs, UK



Moms see gaming  
as part of their  
entertainment repertoire.



“

When my husband studies every evening I need a hobby and that's why I find myself going on games, to pass the time and I find it more interactive than watching TV for example.”

- Mom of three, 30yrs, UK



“

They play an important part/role. They allow me to escape from the daily stress. It's a kind of entertainment that I have been particularly enjoying since I was 20, so the last 25 years.”

- Mom of three, 45yrs, FR



“

It's always been another source of fun, like TV and movies. Just more interactive.”

- Mom of one, 38yrs, US



“

As common and normal as watching TV or a movie. Entertainment with family. Or as calming as reading a book.”

- Mom of two, 33yrs, US



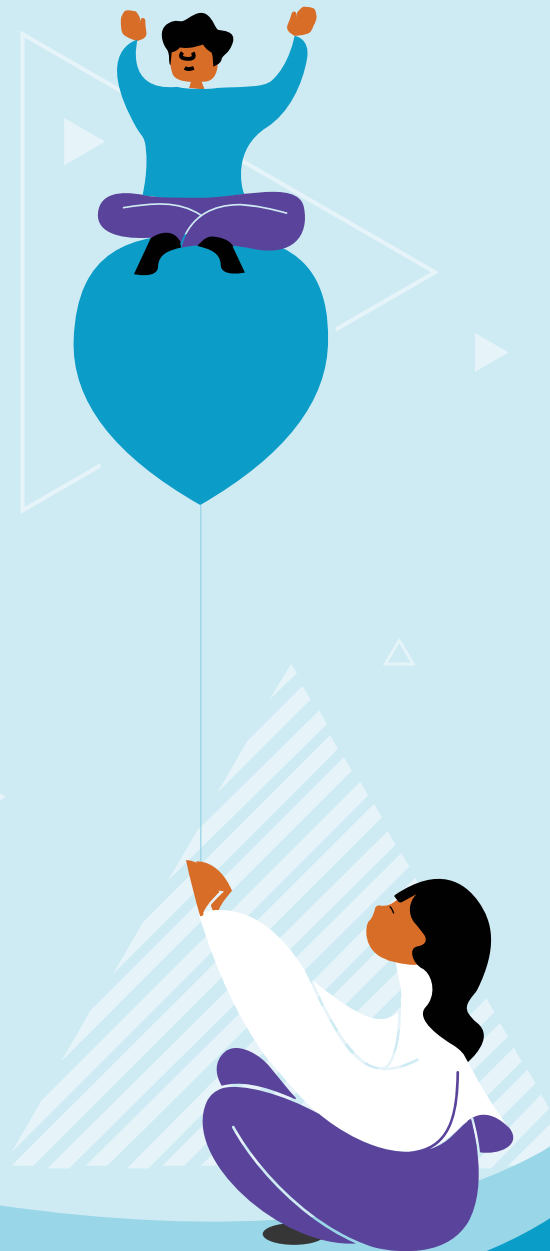
“

It plays a very important role in my life. It is probably my number one, go to method of entertaining and relaxing.”

- Mom of two, 45yrs, UK

### INSIGHT THREE

Gaming delivers  
moms value  
and positivity.



## GAMING BRINGS VALUE AND POSITIVITY

# ▶ Gaming is an important part of moms' lives.

For gamer moms, gaming is a key part of the entertainment that they love so much. They view entertainment, including gaming, as an important and positive part of their lives, more than their non-gaming mom peers.

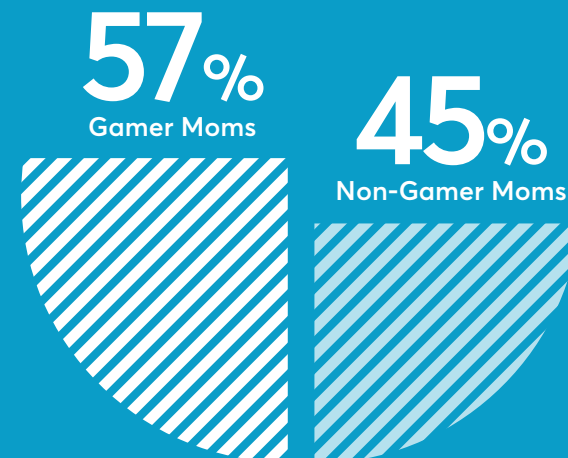
More gamer moms believe entertainment improves their mood compared to non-gamer moms. This sentiment only increases when looking at multi-platform moms, who are 28% more likely to agree that "entertainment improves my mood" than mobile-only moms. For this group, entertainment is a mood booster that is solving problems and making them smarter.

### More than just a hobby

When it comes to gaming specifically, multi-platform gamer moms report being entertained, happy, excited, and competitive, with some also feeling creative, smart, and powerful when they game. Gaming for these moms is more than just a hobby, it is something that enriches and adds value to their lives day-to-day.

## More joyful.

"Entertainment improves my mood"



### **Gaming fosters a sense of connectedness**

The joy that gamer moms get from entertainment goes beyond the individual experience. Gamer moms believe entertainment technology is bringing people closer together, more so than their non-gaming counterparts.

This feeling of connection extends into the family. Gamer moms outpace non-gamer moms in their hopefulness for their children's future. They are also more likely to feel they can easily relate to their children. For gamer moms, gaming is a connective tissue in their relationships with their kids - the more they game, the more they can relate to their children.



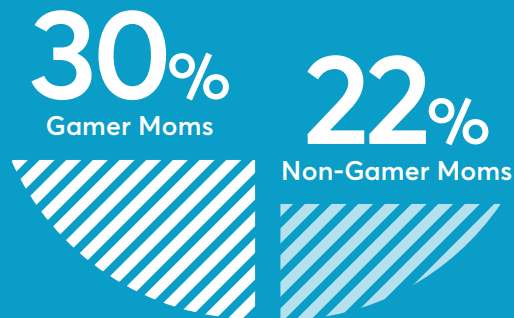
“

[Gaming] helps me relax and unwind, helps me bond with and create fun memories with others, helps me feel a sense of accomplishment, entertains me and others, is fun, is a challenge, and is mentally invigorating. It also helps teach my children many important skills like problem-solving, teamwork, perseverance, gives a sense of accomplishment, enhances concentration, gives opportunities for creativity, etc.”

- Mom of two, 39yrs, Florida, USA

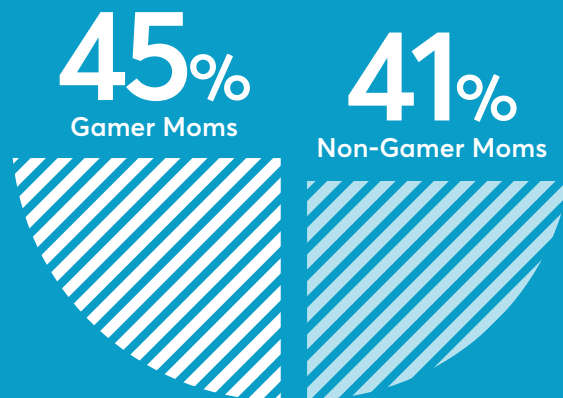
# More united.

Believe entertainment technology brings people closer together.



# More optimistic.

Have hopefulness for their children's future.



# More connected.

Feel they can easily relate to their children.





#### INSIGHT FOUR

Gamer Moms  
are primed  
for brands.

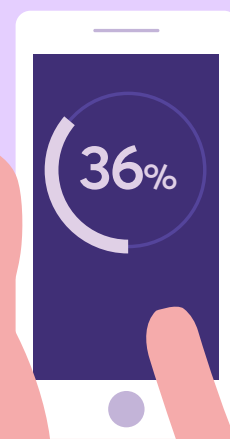


## GAMER MOMS ARE PRIMED FOR BRANDS

# Gamer Moms have purchase influence.

At the heart of their family, gamer moms are also at the center of their household's decision-making. When it comes to gaming, gamer moms are making decisions for themselves, but they're also more likely to be a primary or shared decision-maker on purchases for the family.<sup>4</sup>

They also like to shop and seek out new products, driven by a sense of pride in being the first person to try something new. These mega-consumers have a willingness to put in time researching and discovering new products, creating key opportunities for brands to directly connect with them along their path to purchase.



of gamer moms agree they love researching new products and entertainment

<sup>4</sup> Source: Newzoo 'Betting on Billions: Unlocking the Power of Mobile Gamers', December 2018



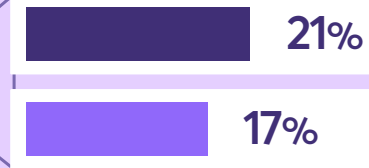
● Gamer Moms

● Non-Gamer Moms

## Gamer Moms are receptive to advertising

Gamer moms also have an interest in advertising that exposes them to new products. As they are more likely to shop online, there are greater opportunities for brands to achieve easier conversion through digital advertising.

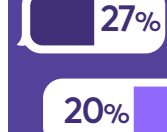
"I like seeing ads from my favorite brands"



"I appreciate advertising that exposes me to something new"



"My friends often come to me for recommendations"



**Footer:**

Gamer Moms n=4,002; Non-Gamer Moms n=3,200



"If I really like a product, and I believe in the product and it's something that I use... then yeah I definitely share it. I have a younger sister and we share a lot of things like that, and my mum as well."

- Mom of one, 29yrs, UK

## A prime opportunity for brands

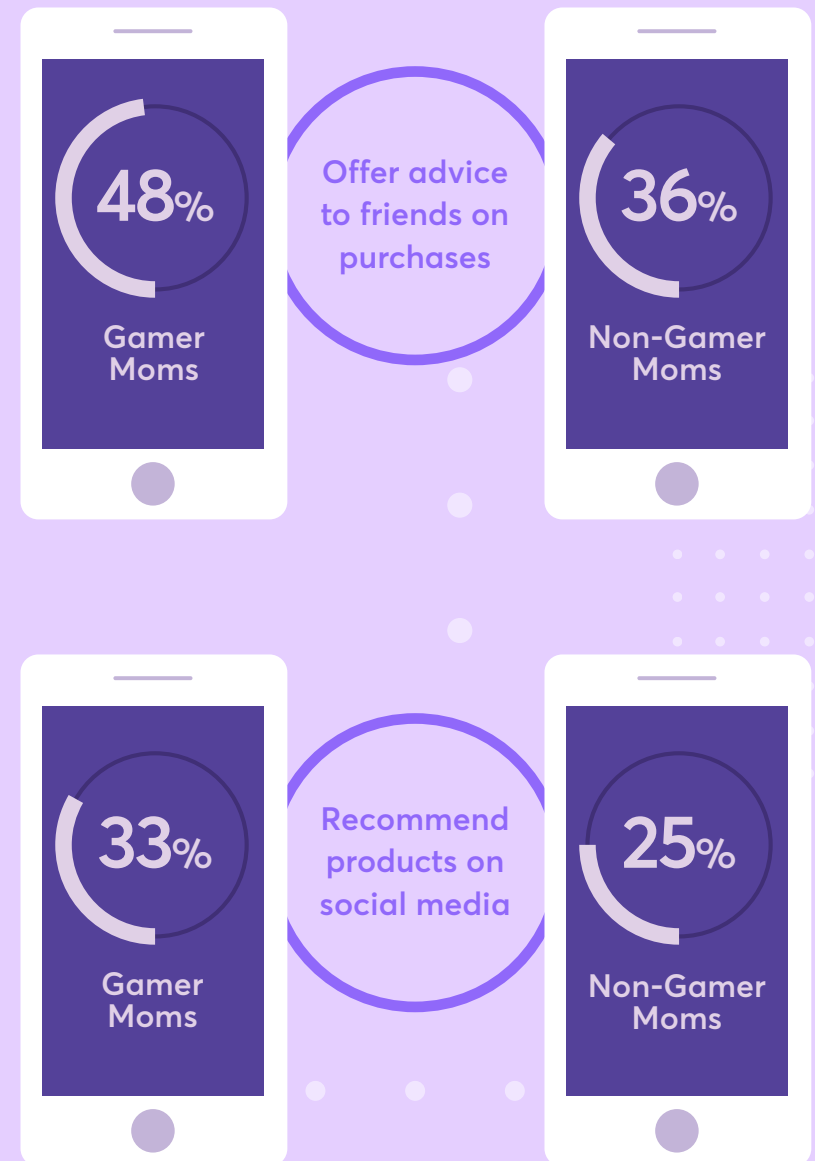
Once gamer moms have found something new that they love, they're more likely to share it. They are more engaged with brands on social media and more likely to recommend those brands to their friends and family than non-gamer moms. Beyond unparalleled levels of engagement, gamer moms are very active among their peers, offering recommendations, tips and even sharing brand posts they like within their networks.

The purchasing power and social influence of gamer moms presents a prime opportunity for brands who want direct access to household decision-makers.



“I’m a massive binge-watcher of things. I’m the one who is always like ‘You must watch this’ and they’re like ‘Oh yeah, maybe...’ and when they watch they’re like ‘Oh it was amazing!’”

- Mom of two, 43yrs, UK

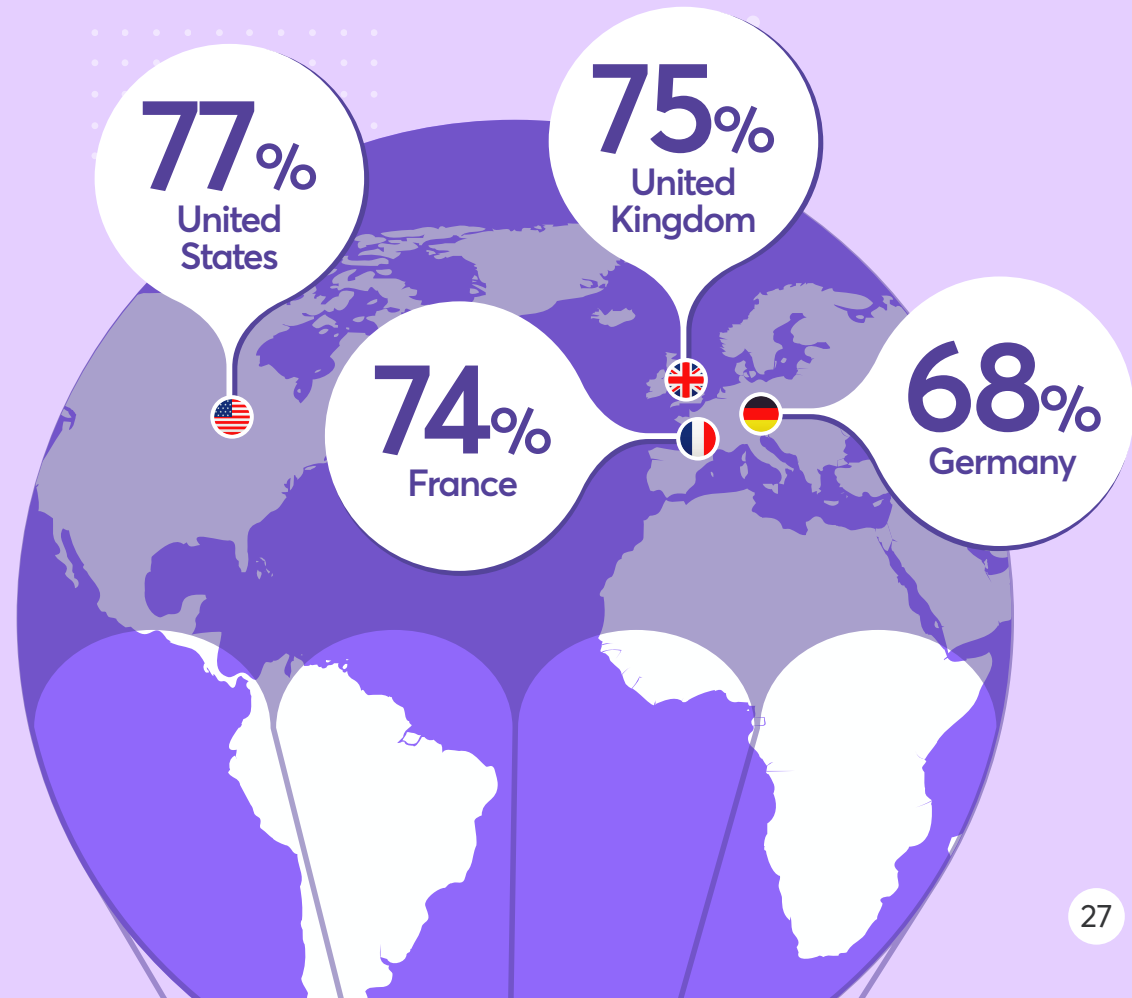


**Footnote:**  
Total n=7,202; Gamer Moms n=4,002,  
Non-Gamer Moms n=3,200"

## Gamer Moms that play mobile games daily

### A global opportunity

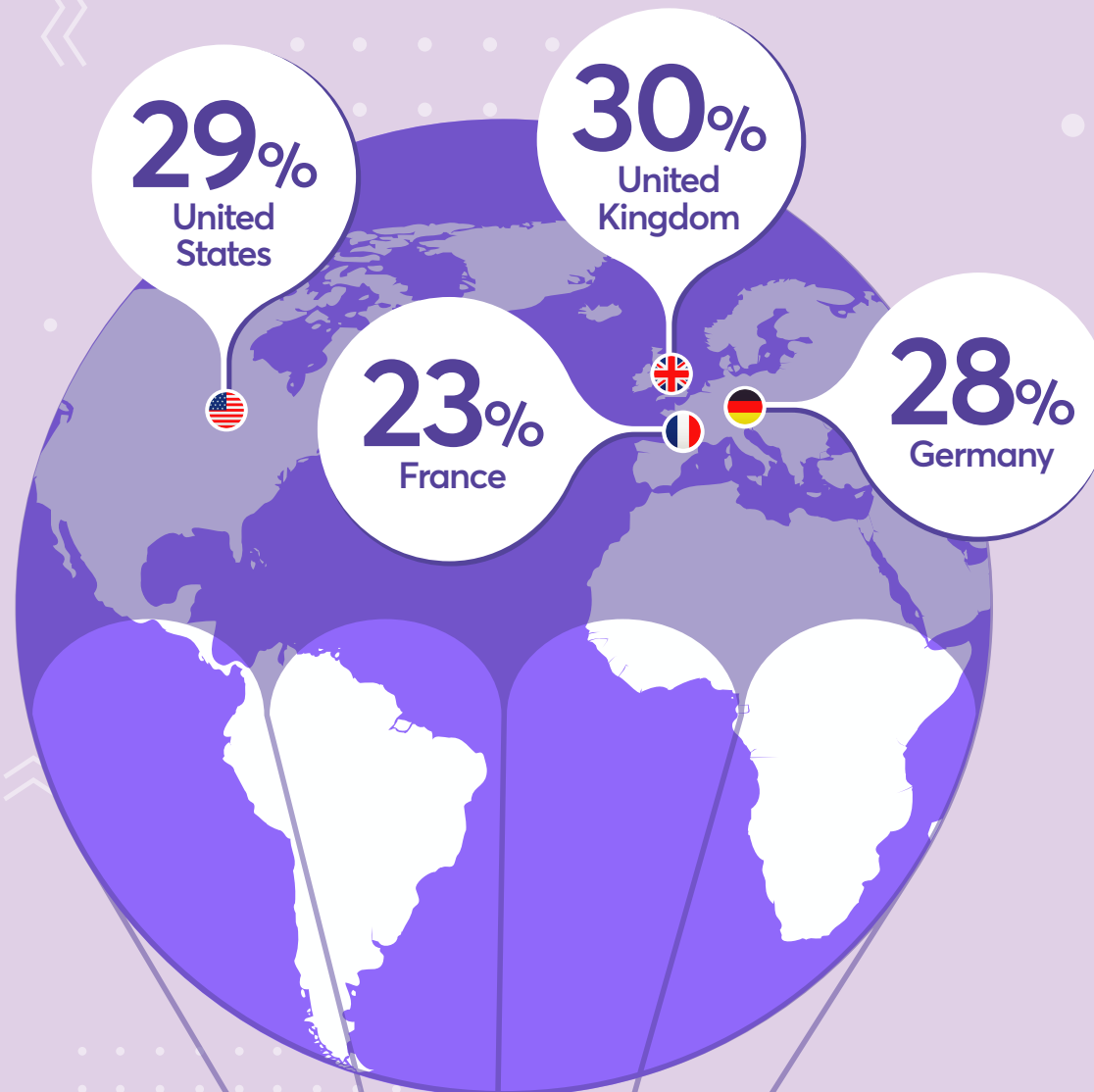
The opportunity to reach gamer moms extends across continents. In the four key global markets featured in this study, the United States, United Kingdom, France and Germany, the prevalence of gamer moms was consistent, with moms playing frequently and for long periods of time per week.

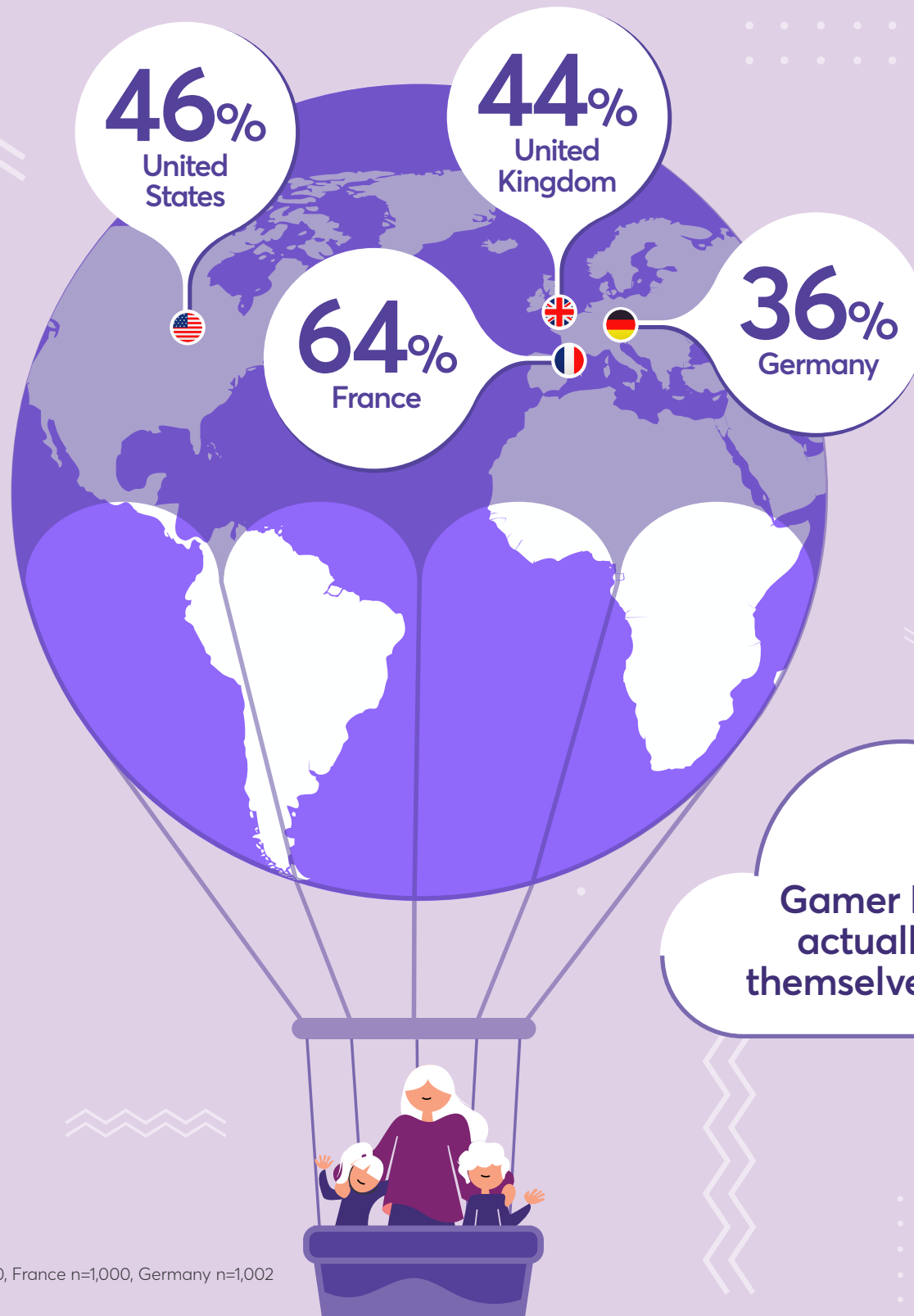


**Footer:**

US n=1,000, UK n=1,000, France n=1,000, Germany n=1,002

Gamer Moms  
that play games  
10+ hours a week





Gamer Moms that  
actually *describe*  
themselves as gamers

## IN SUMMARY

Gamer Moms are  
the next level.



## GAMER MOMS ARE THE NEXT LEVEL

# Moms got game.

The stereotype that women, and especially moms, don't enjoy playing video games couldn't be further from the truth. Women don't just play video games, they love them. They see gaming as an important part of their lives, one which brings them value and joy.

This shift in the perception of women and gaming is becoming increasingly evident within the gaming industry. Games are being designed with women in mind, there is greater representation of women both in games themselves and gaming advertising, and more brands are starting to take notice.

While much of this can be attributed to the explosion of mobile as the entry point for women and moms into gaming, a more complete picture includes the full spectrum of gaming across mobile, console and PC. Women are playing more games more often. Moms, in particular, are spending many hours each week playing games, from casual mobile games to Triple-A action and MMORPG titles, and many of them have been gaming for 10 years or more.

The purchasing power of moms has long been recognized by brands, but reaching them hasn't always been clear-cut. Gaming represents a unique opportunity for brands to tap into the key household decision-makers when they are highly engaged, receptive to advertising and in a positive mindset. Increasingly, brands are becoming aware of the value of the gamer mom audience and the accessibility to reach and influence this core consumer.

“Gaming is a huge part of my life. I play a lot and it is a part of who I am. Gaming offers me an escape that nothing else can.”

- Mom of three, 24yrs, Minnesota, USA



# About Activision Blizzard Media

Activision Blizzard Media is the gateway for brands to the #1 cross-platform gaming company in the western world, with hundreds of millions of players across over 190 countries. Our legendary portfolio includes iconic mobile game franchises such as Candy Crush™, esports opportunities like the Call of Duty® and Overwatch® Leagues, and some of the top PC and console gaming franchises such as World of Warcraft®, Call of Duty®, and StarCraft®. The idea is simple: great game experiences offer great marketing experiences.

To learn more about the research or how your brand can reach the gamer mom audience, please contact:

[gammomoms@activision.com](mailto:gammomoms@activision.com)



# About Alter Agents

Alter Agents is a full-service strategic market research consultancy reimagining research in the age of shifting decision making. Alter Agents curates leading edge research technologies and current methodologies to deliver insightfully designed research projects geared towards challenging issues.

[contact@alteragents.com](mailto:contact@alteragents.com)  
[alteragents.com](https://alteragents.com)

