

MOM'S GOT GAME

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Introduction:

MOM'S GOT GAME

The numbers in gaming are staggering: a global audience of over three billion and an industry worth more than \$188 billion¹. But contrary to popular belief, gaming is not purely dominated by young males. A significant portion of the gaming audience, 1 in 5², is made up of women with children, a segment that until now has remained largely unstudied.

Historically, gamer women—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 often a particular kind of player, usually women who play casual games in their downtime. In these stories, their gaming is a novelty, and they are not considered part of the broader gaming community.

But they're not just playing mobile games. Our research shows that gamer moms account for the majority of moms, with 87%³ 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 are making decisions for the family, enjoying 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 highly valuable audience for brands.

This report takes a closer look at gamer moms—including their lifestyles, connection with their family, buying decision influence, and interaction with brands. It compares the behaviors of gamer moms to their non-gaming counterparts. This research will present a clearer picture of who gamers are today while showcasing the opportunity for brands to reach and connect with these economic powerhouses.

Source:

¹Newzoo Global Games Market Report, July 2023

²GlobalWebIndex, GWI Gaming, Q4 2021 - Q2 2023 (Base: Global Internet Users 18+)

³GlobalWebIndex, GWI Core, Q3 2022 - Q2 2023 (Base: US Internet Users 18+)

Note: Gamer defined as one who uses a device (e.g. console, PC, mobile) to play games

Insight One:

MOST MOMS ARE GAMERS AND GAMING IS A CORE PART OF THEIR LIVES

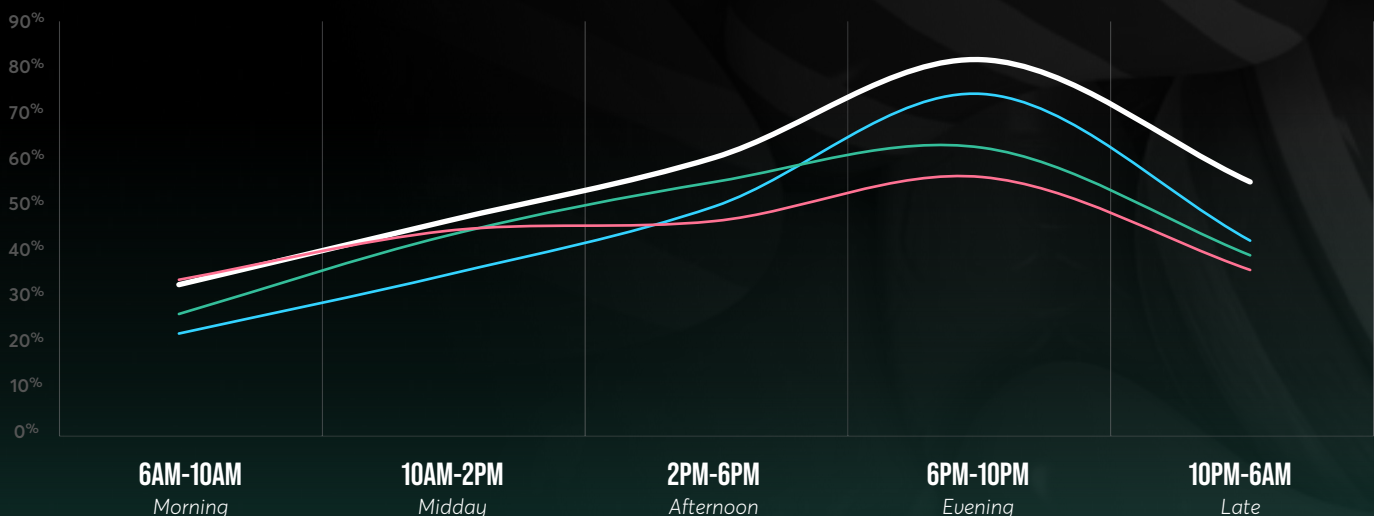
With 87%³ of moms in the US identifying as gamers, the perception of gaming as an activity enjoyed solely by men is both outdated and inaccurate.

And gamer moms aren't new to the table; more than half have been playing games for over 10 years. They are seasoned players, demonstrating a commitment and passion for gaming that has stood the test of time.

Gaming is not just a sporadic activity for these moms; it has become a part of their lifestyle. They can be found gaming throughout the day, with gaming even more popular across dayparts than what's considered the more traditional tenets of people's media diets (e.g. TV, online video, and social media). This is indicative of a larger trend, as gaming continues to grow in popularity and acceptance among diverse demographic groups.

WEEKLY MEDIA CONSUMPTION AMONG GAMER MOMS

● Gaming ● TV ● Online Video ● Social Media



Source:

³GlobalWebIndex, GWI Core, Q3 2022 - Q2 2023 (Base: US Internet Users 18+)

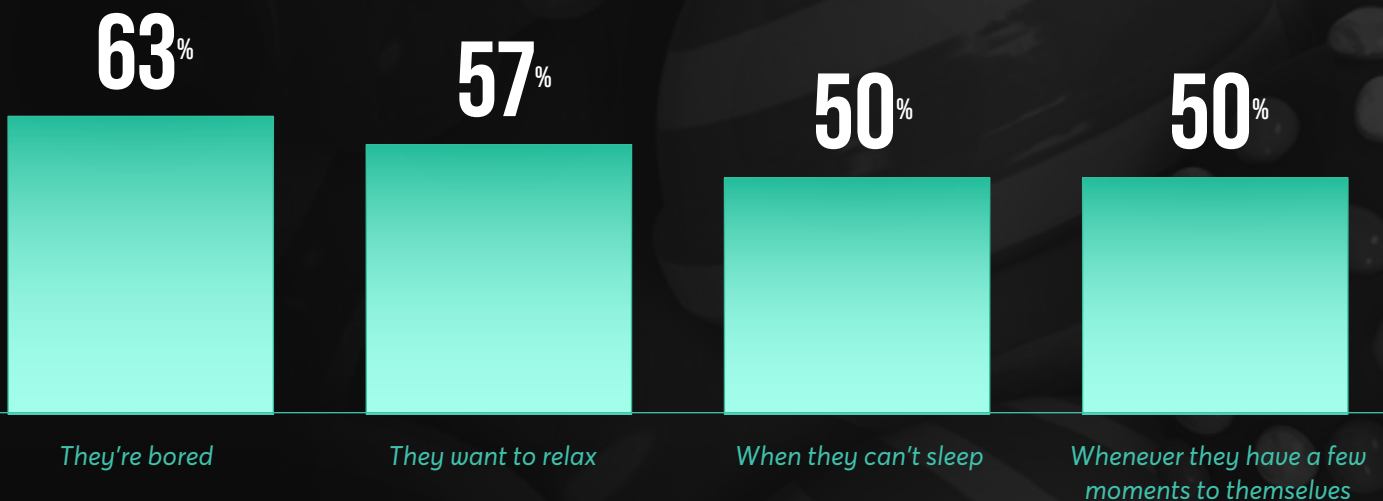
Note: Gamer defined as one who uses a device (e.g. console, PC, mobile) to play games

The Gamer Mom audience is diverse and play for many reasons

Just as there is no typical 'gamer', there is no typical 'gamer mom', with the segment made up of a rich kaleidoscope of women with different motivations and preferences

for games. The variety of moms is reflected in the variety of reasons they game, including boredom and relaxation.

GAMEPLAY TRIGGERS



"Gaming is my peace of mind. My moment to myself. It gives me time to leave my daily thoughts behind for a while."

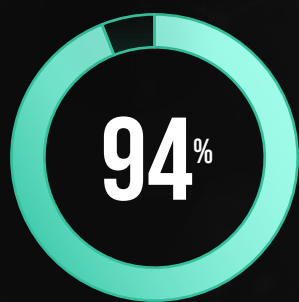
- Mom of 3, 37 years old

Moms play on all platforms

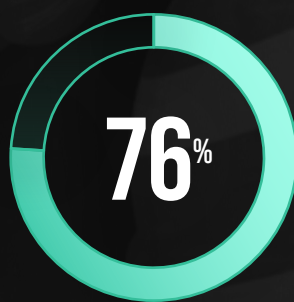
The growth of mobile gaming has increased the accessibility of gaming for women, lowering the barrier for entry by removing the need to purchase additional hardware to play and making it easy to discover new

titles. But 80% of moms are playing on multiple platforms, not just mobile. Of all gamer moms, mobile still reigns with 94% of moms playing mobile games on a monthly basis.

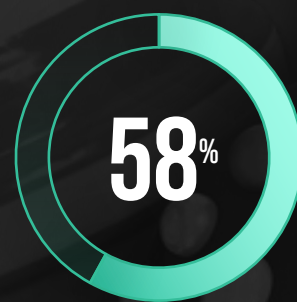
DEVICES PLAYED ON A MONTHLY BASIS



Mobile



Console

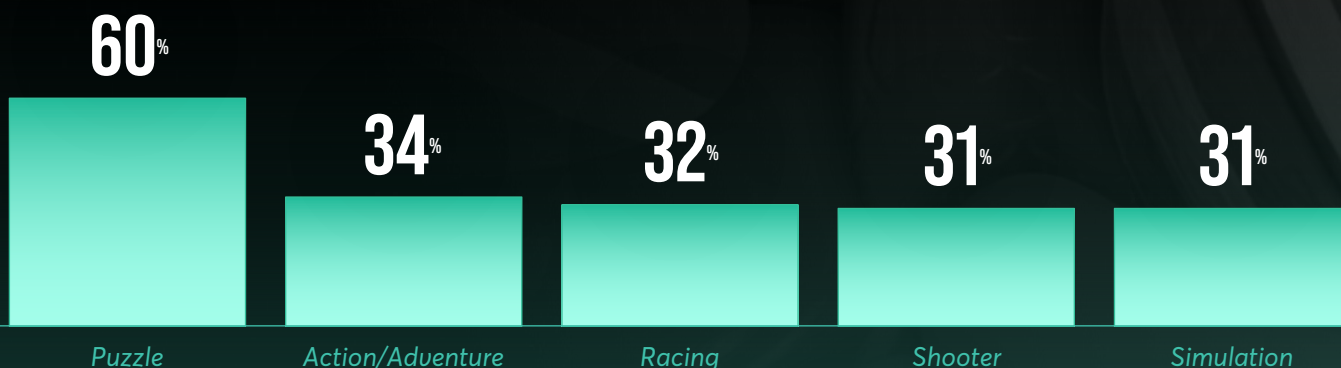


PC

But focusing on mobile gaming doesn't tell the full story, as gamer moms are not only playing on their phones. The majority of gamer moms are also playing games on

consoles and/or PCs, and they're spending many hours each week playing puzzle games, action/adventure, racing, shooter, and simulation games.

TOP GENRES



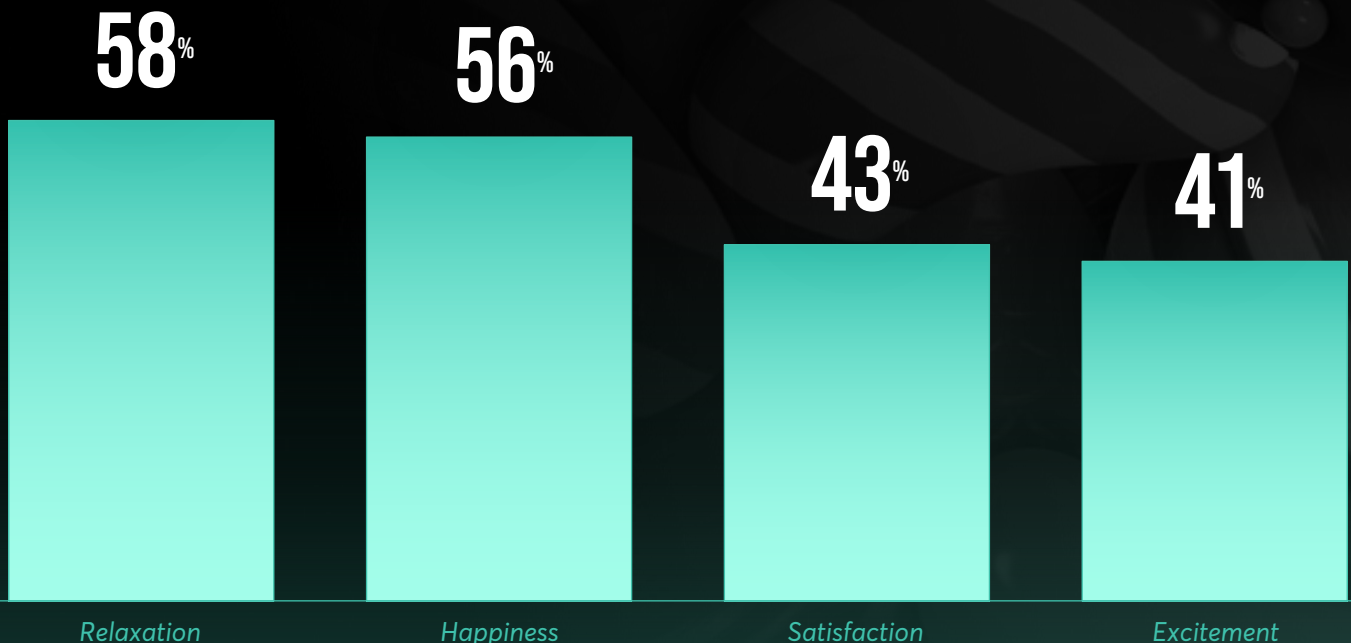
Insight Two:

GAMING DELIVERS MOMS VALUE, POSITIVITY, AND DEEPENS THEIR FAMILY BONDS

For gamer moms, gaming is a key part of the entertainment technology that they love so much. They view entertainment, including gaming, as an important and positive part of their lives, experiencing emotions like relaxation, happiness, satisfaction, and excitement while playing.

Gaming for these moms is more than just a hobby, it is something that enriches and adds value to their lives day-to-day. Half of all gamer moms are playing games whenever they have a few moments to themselves showing that when the busyness of family life hits a lull, 1-in-2 moms are reaching for a game to relax and satisfy them.

EMOTIONS WHILE GAMING

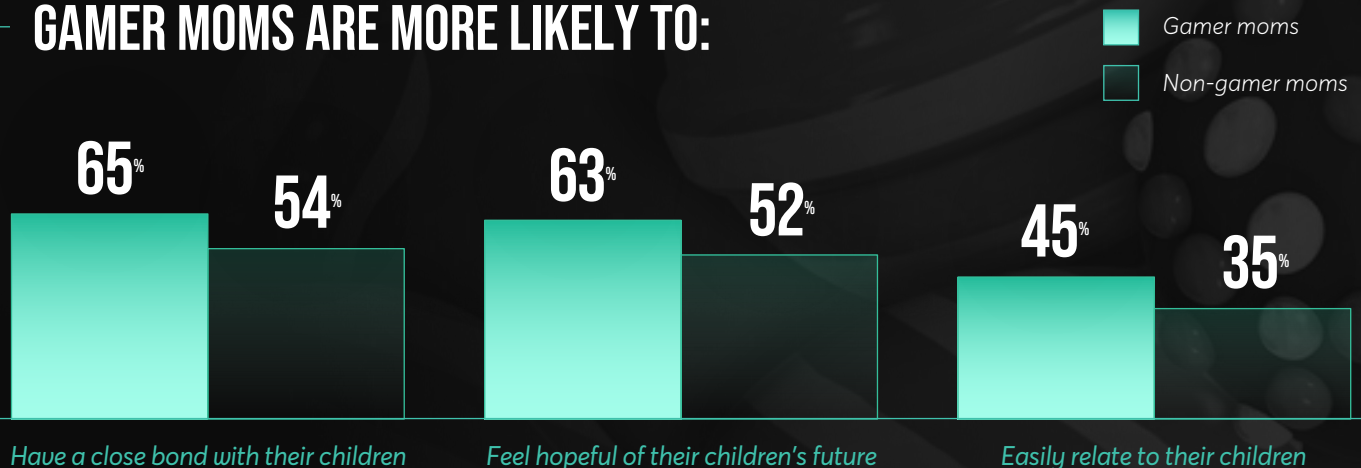


Gaming fosters a sense of connectedness

The joy that gamer moms get from gaming goes beyond the individual experience. Gamer moms believe entertainment technology is bringing people closer together, more so than their non-gaming counterparts. When they do choose to play with others, half of gamer moms will choose to play with their children. 65% of gamer moms feel they have a close bond with their children compared to 54% of non-

gamer moms. This feeling of connection extends to other forms of family bonding, too. Gamer moms outpace non-gamer moms in their hopefulness for their children's future and 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 relate.

GAMER MOMS ARE MORE LIKELY TO:



"Gaming play[s] a huge role in my life. Playing with my children and spouse make it a bonding experience that is fun for the whole family."

- Mom of 2, 31 years old

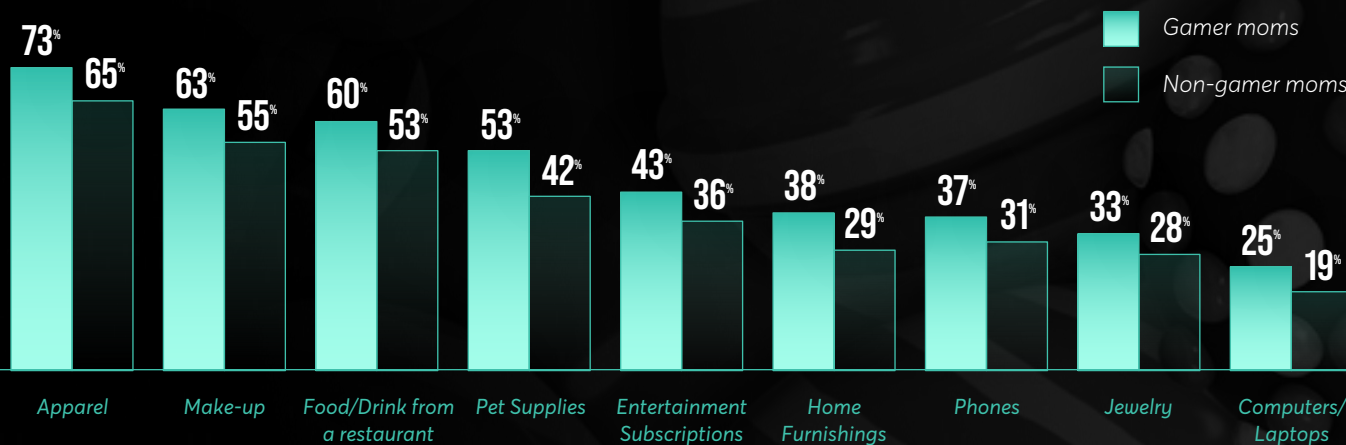
Insight Three:

GAMER MOMS ARE VALUABLE CONSUMERS

At the heart of their family, gamer moms are also at the center of their household's decision making. More so than non-gamer moms, gamer moms are the primary

decision maker across shopping categories, and they're heavily involved during prime shopping seasons like Back To School and Winter Holiday.

MAIN RESPONSIBILITY FOR HOUSEHOLD SHOPPING CATEGORIES



Back to School

72%

of Gamer Moms go back-to-school shopping with their kids

\$470

is spent on back-to-school supplies on average

51%

start school shopping in July or earlier

Winter Holidays

79%

of Gamer Moms buy gifts for their children during the winter holiday

\$970

is spent on winter-holiday shopping on average

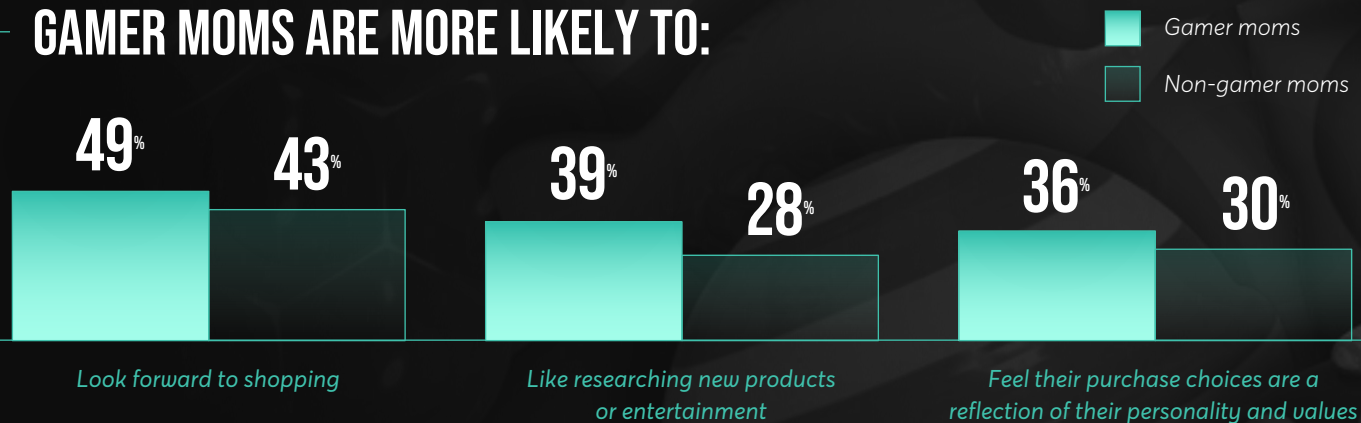
57%

start winter holiday gift shopping at least one month in advance

Gamer moms are mega-consumers who look forward to their weekly shopping, enjoy putting in time researching and discovering

new products or entertainment, creating key opportunities for brands to directly connect with them along their path-to-purchase.

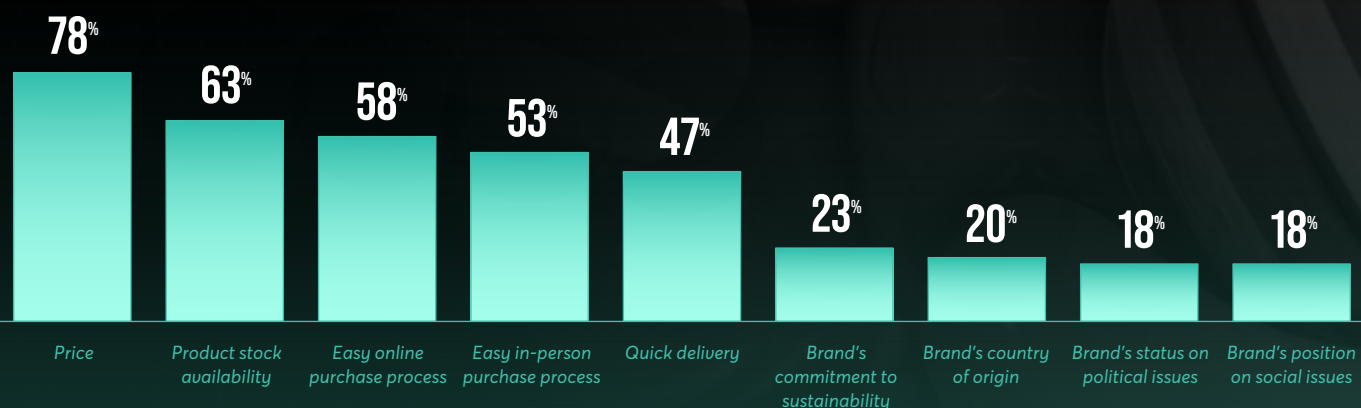
GAMER MOMS ARE MORE LIKELY TO:



Gamer moms are also more receptive to advertising that exposes them to new products. As 56% of gamer moms skew towards a preference for online shopping over in-person shopping, there are greater opportunities for brands to achieve easier conversion through digital advertising. They make purchasing decisions with a high

degree of practicality, looking first to price and availability when buying, then the ease of the purchasing process both online and in person. Gamer moms are largely driven by practicality, price, and convenience when making purchasing decisions. However, they also show a moderate concern for sustainability and the brand's ethical stance.

FACTORS THAT HAVE A MAJOR IMPACT ON PURCHASE DECISIONS



Conclusion:

GAMER MOMS ARE THE NEXT LEVEL

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 life, 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 a large part of this is due to the explosion of mobile gaming and the entry point it has given 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 throughout their day at a rate that outpaces even social media. Moms, in particular, are spending many hours each week playing puzzle games, action/adventure, shooters, and racing games; and more than half 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.



RESEARCH & METHODOLOGY

Activision Blizzard Media utilized Toluna's survey panel to conduct a quantitative research study among 8,500 adults 18+ in the United States. All respondents are female parents 18+ with at least one child under the age of 18 at home. Gamer moms are moms who have either gamed, watched TV, used social media, and/or watched online videos in the past 30 days and who did not work in related industries (i.e.

advertising, media, gaming, or market research). Where comparisons have been made between gamer moms and non-gamer moms, differences were found statistically significant with 90% confidence.

US Sample:

Gamer Moms: N = 842

Non-Gamer Moms: N = 495

ABOUT ACTIVISION BLIZZARD MEDIA

Activision Blizzard Media Ltd is the gateway for brands to the leading interactive entertainment company with hundreds of millions of monthly active users around the world. Our legendary portfolio includes iconic mobile game franchises such as Candy Crush™, esports like the Call of Duty League™, the Overwatch League™ and some of the top PC and console gaming franchises such as Call of Duty®, World of Warcraft®, and StarCraft®. The idea is simple: great game experiences offer great marketing experiences.

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