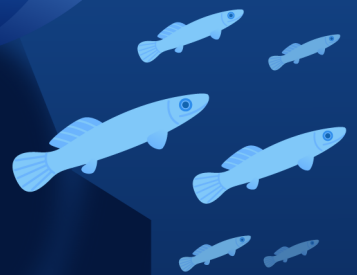


2024



 MISTPLAY<sup>®</sup>

# Mobile Gaming Spender Report

Decoding today's mobile IAP spenders to understand motivations, engagement dynamics, and behavioral shifts on the horizon.





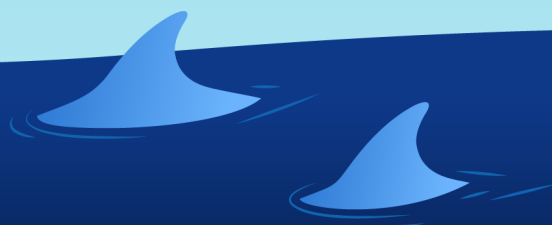
# Foreword

We are entering a new phase of mobile gamer mindsets and behaviors, and a new reality that requires game publishers to develop a deeper understanding of user motivations, spending behavior, and how to create games that have the right product-market fit to capture their share of the IAP wallet. In this new market maturity, there will be a disproportionate skew of winners and losers over time, as sustainable user acquisition becomes even more challenging and expensive, and the competition for a more discerning consumer wallet share intensifies. Understanding the intricacies of spender behavior to drive LTV has therefore become essential as we all navigate this landscape.

As the behavior of modern mobile gamers continues to adapt with the world around us, unraveling the motivations and preferences driving in-game spend becomes more crucial than ever – to not only deliver gaming experiences players will enjoy and invest in but also to consider new strategies for 2024 and beyond as spenders consider cutting back and concentrating discretionary spend. Additionally, the rising trend of publishers shifting focus towards first-party web stores – to preserve margins and better engage core audiences – unlocks an opportunity to re-evaluate engagement and monetization strategies for further impact. This first edition of Mistplay's annual Mobile Gaming Spender Report provides fresh insights into IAP spender behavior to help publishers push their thinking to create a competitive advantage and capitalize on an evolving market.

Our 2024 Mobile Gaming Spender Report is comprised of an analysis of millions of users within the Mistplay platform and a survey of nearly 2,000 IAP spenders to dive into why they spend, how that spend may change in the future, and what factors may influence further investments. With these findings, we aim to equip product, monetization, and acquisition teams with a comprehensive understanding of the modern mobile game spender across cohorts, geographies, and genre-based persona. The report is designed to inform publishers' strategic problem-solving and capability development to build long-term player loyalty and stay ahead of market challenges and new user behavior.

JASON HELLER, CEO

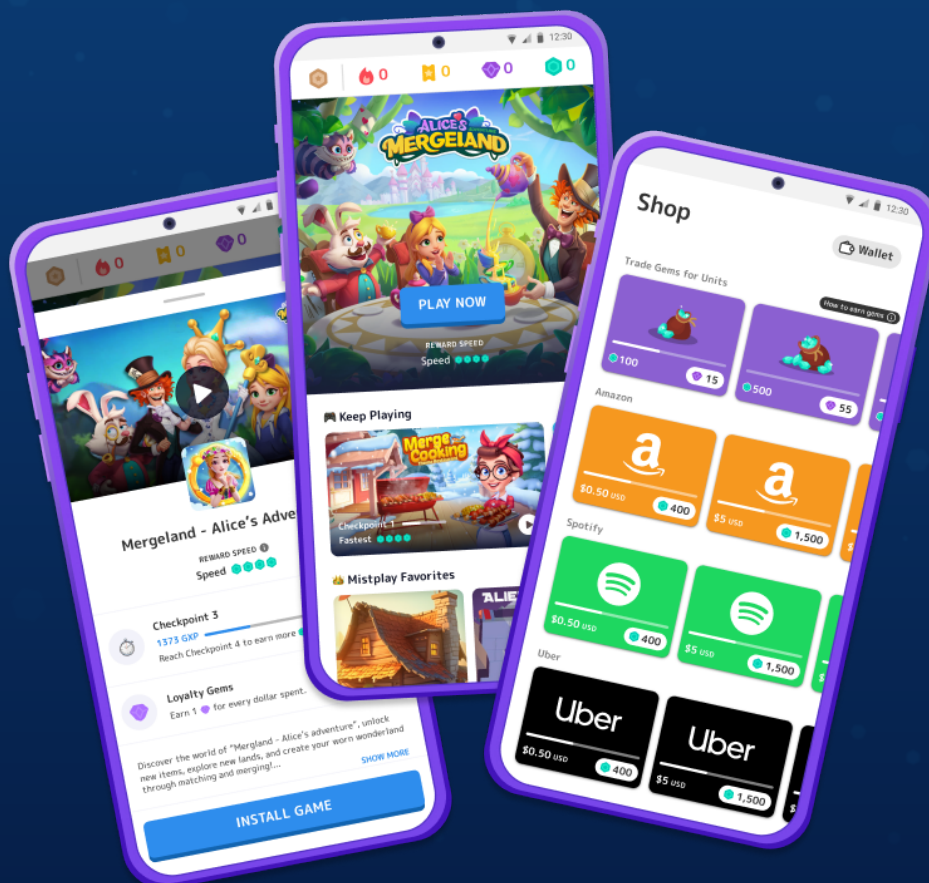


# The Mistplay platform

Mistplay is the **#1 loyalty app** for mobile gamers. Our community of millions of engaged mobile gamers use Mistplay to discover new games to play and spend in to earn rewards. Headquartered in Montreal and launched in 2016, Mistplay has climbed the ranks as a media source for game publishers, most recently achieving **#8** overall on the AppsFlyer Performance Index for Android Retention and Top 10 for ROI and Retention on the 2024 Singular ROI Index.

- **A growing community** of over 2 million monthly gamers means developers can reach a massive audience of engaged players looking for their next favorite game.
- **AI-driven recommendation engine** suggests games based on player habits, ensuring Mistplay users play and spend in games they're most likely to enjoy.
- **Play-and-earn** fosters increased user retention and LTV, as users redeem loyalty points for tangible rewards like gift cards from top brands.

To learn more, visit [www.mistplay.com/advertising](http://www.mistplay.com/advertising).





# Key findings

## 1. Mobile spenders will be more discerning with their spend in 2024

The landscape of mobile game spending may witness a discernible shift this year, with 32% of spenders – and 41% of High-value spenders – planning to reduce their in-game spending and shift towards more budget-conscious decisions for discretionary spend.

[Learn more about future behavior changes >>](#)

## 2. A good (personalized) offer goes a long way

Optimizing the usage of IAP offers and discounts can be a viable strategic approach to encourage investment, given that 33% of spenders indicate they will spend if they encounter a deal too good to pass up, and 40% would be influenced to spend more if given personalized offers.

[Learn more about offers >>](#)

## 3. Social factors influence installs, not always spend

Community is a powerful lever at the top of the funnel, with mobile spenders ranking word-of-mouth recommendations as a top-3 discovery channel and 31% downloading three or more games from referrals in the past year, but it may lose importance further down the funnel, as a majority of spenders (69%) report that social factors don't influence their spending decisions at all.

[Learn more about social factors >>](#)

## 4. Loyalty bonuses are powerful tools to engage spenders

Spenders are looking for ways to make their discretionary spend go further and will engage with brands that help them do so, as a majority (79%) not only engage with a variety of loyalty programs but will also spend more in-game if doing so earns them extra points or monetary rewards (51%).

[Learn more about loyalty programs >>](#)

## 5. Engagement with ads relies on relevant, real gameplay

A majority of spenders will download a new game after seeing ad impressions for a few days or less – and while 72% of mobile spenders will be interested in ads that have appealing gameplay, they are often frustrated with misleading gameplay.

[Learn more about ad engagement >>](#)





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## SPENDER COHORTS IN THIS REPORT

- **High-value spender:** \$100 USD+
- **Mid-value spender:** \$10–99 USD
- **Low-value spender:** <\$10 USD

For more information on how we segmented respondents, please refer to the methodology.



# 1 Understanding mobile spenders

## Uncovering key spender traits

### SPENDER PERSONAS

By recognizing the unique traits and behaviors of three key genre-based mobile spender personas, publishers can tailor their marketing and IAP strategies to better resonate with specific demographics and refine game monetization, ultimately enhancing engagement and maximizing revenue potential.

The three main personas are grouped by survey respondents that regularly spend money on IAP in specific genres.



#### Casual Candace

Spends in Match, Puzzle, and Simulation



#### Midcore Mike

Spends in Strategy, Action, Shooter, and RPG



#### Lucky Lucy

Spends in Social Casino



“For us at Jam City, with such a broad portfolio of games, there’s an importance to understanding our players and ensuring they have an engaging long term experience. We cannot stress enough the importance of layered targeting focused on player behaviours and traits.”

**JON CHEW**  
Director - User Acquisition, Jam City





# Casual Candace

SPENDS IN: MATCH, PUZZLE, SIMULATION

MISTPLAY®

## DEMOGRAPHICS

### Gender

Female (81%)

Male (16%)

Non-binary (3%)

### Age

18-24 (3%)

25-34 (21%)

35-44 (37%)

45-54 (24%)

55+ (14%)

### Employment

Employed (67%)

Unemployed (30%)

Student (3%)

## SPEND BEHAVIOR

### Games spent in per month

1 (38%)

2-3 (51%)

4-5 (8%)

6+ (3%)

### Purchase frequency

Every few months (31%)

1-2/mo (37%)

3-6/mo (17%)

6+/mo (12%)

### Time to first purchase

Within the first day (4%)

Within a couple days (17%)

Within a week (34%)

Within a month (77%)

## MOTIVATIONS

### Top motivations to click an ad & install a game

1. Relevant gameplay (73%)

2. Eye-catching visuals (32%)

3. No longer progressing in current game (27%)

### Top Influential reasons to spend

1. Personalized deals (42%)

2. Holiday/event promos (40%)

3. Limited-time offers (34%)

### Channels to market

1. In-app promo (42%)

2. Email (23%)

3. Social media (17%)

4. Push notifis (16%)

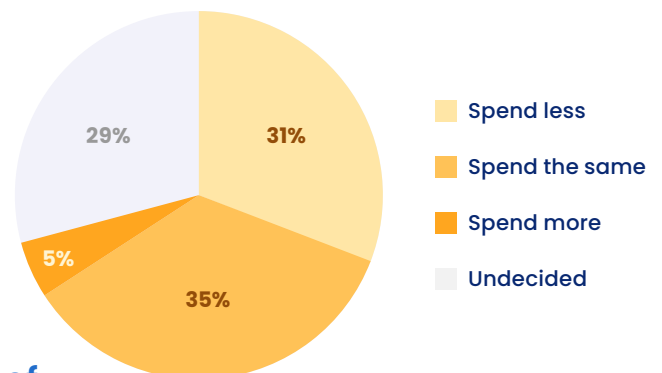
5. Texts (13%)

## LOOKING AHEAD AT 2024

### Top behavioral changes they're thinking about

1. Spending in fewer games overall (28%)
2. Spending less frequently (17%)
3. Purchasing more discount/on-sale items (20%)

### How their spend will change



### What Casual Candace wants to see more of

*"Make continued gameplay more interesting rather than endless levels of the same play."*

*"I'd like to see more opportunities for rewards."*

*"If I receive rewards, I'd make more in app game purchases"*

*"Games where the actual play is exactly like the ads. I've tried too many that are nothing like the ads, and I uninstall them immediately"*



# Midcore Mike

SPENDS IN: STRATEGY, ACTION, SHOOTER, RPG

MISTPLAY®

## DEMOGRAPHICS

### Gender



### Age



### Employment

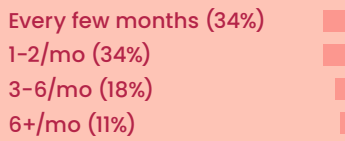


## SPEND BEHAVIOR

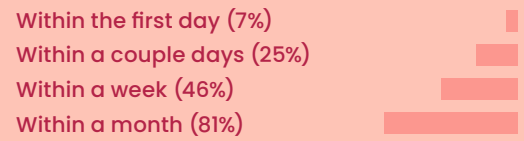
### Games spent in per month



### Purchase frequency



### Time to first purchase



## MOTIVATIONS

### Top motivations to click an ad & install a game

1. Relevant gameplay (74%)
2. Eye-catching visuals (40%)
3. Positive ratings/reviews (27%)

### Top Influential reasons to spend

1. Personalized deals (45%)
2. Holiday/event promos (43%)
3. Limited-time offers (41%)

### Channels to market

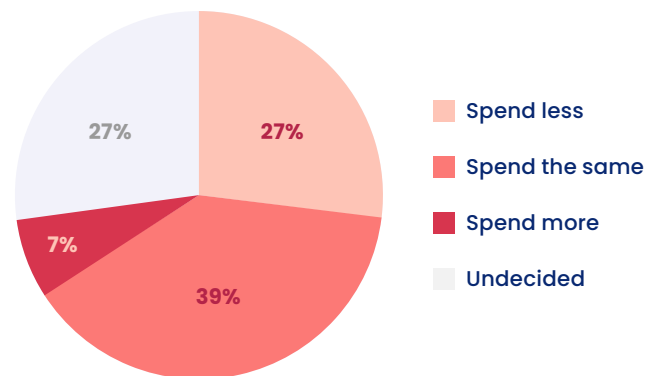
1. In-app promo (38%)
2. Email (28%)
3. Social media (21%)
4. Push notifs (20%)
5. Texts (12%)

## LOOKING AHEAD AT 2024

### Top behavioral changes they're thinking about

1. Spending in fewer games overall (29%)
2. Spending less frequently (18%)
3. Purchasing more discount/ on-sale items (26%)

### How their spend will change



### What Midcore Mike wants to see more of

*"Definitely more personalized rewards and opportunities to earn extra points or free items in games."*

*"Better discount for loyal players."*

*"Getting more for less money – maybe a subscription based purchase where you are given many items per month."*





# Lucky Lucy

SPENDS IN: SOCIAL CASINO

MISTPLAY®

## DEMOGRAPHICS

### Gender

Female (71%)  
 Male (22%)  
 Non-binary (1%)

### Age

18-24 (2%)  
 25-34 (20%)  
 35-44 (41%)  
 45-54 (23%)  
 55+ (15%)

### Employment

Employed (63%)  
 Unemployed (34%)  
 Student (3%)

## SPEND BEHAVIOR

### Games spent in per month

1 (26%)  
 2-3 (55%)  
 4-5 (12%)  
 6+ (7%)

### Purchase frequency

Every few months (24%)  
 1-2/mo (31%)  
 3-6/mo (23%)  
 6+/mo (17%)

### Time to first purchase

Within the first day (7%)  
 Within a couple days (22%)  
 Within a week (43%)  
 Within a month (81%)

## MOTIVATIONS

### Top motivations to click an ad & install a game

1. Relevant gameplay (70%)  
 2. Eye-catching visuals (33%)  
 3. No longer progressing in current game (27%)

### Top Influential reasons to spend

1. Personalized deals (42%)  
 2. Holiday/event promos (40%)  
 3. Limited-time offers (34%)

### Channels to market

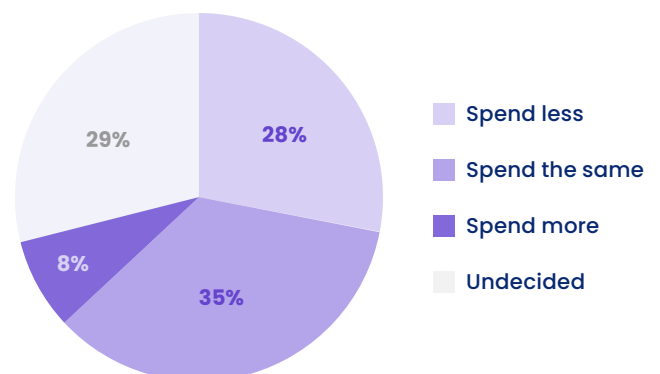
1. In-app promo (37%)  
 2. Email (36%)  
 3. Push notifs (21%)  
 4. Social media (21%)  
 5. Texts (19%)

## LOOKING AHEAD AT 2024

### Top behavioral changes they're thinking about

1. Spending in fewer games overall (27%)
2. Spending less frequently (18%)
3. Purchasing more discount/ on-sale items (21%)

### How their spend will change



### What Lucky Lucy wants to see more of

*"The ability to earn rewards for playing mobile games."*

*"Simpler fun mini games, less ads, and more social chat."*

*"More deals, lower prices, and more give ways to loyal customers and players."*



## Basic spender behaviors

Overarching spender behavior illuminates the continued pressure for game publishers to vie for consumers' share of wallet in order to drive revenue and sustainable growth. This manifests not only in needing to outclass other games on the market, but also in securing consumer spend over other discretionary purchases.

- 39% of spenders are only spending in one game per month, with half spending in 2-3 games – although High-value spenders tend to spend in more games overall
- 37% of overall spenders typically make 1-2 purchases a month, with half of High-value spenders (54%) making three or more

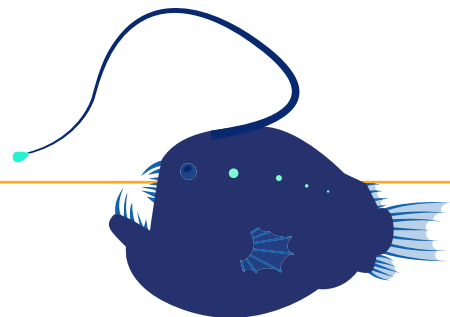


“Players aren’t downloading games as much or as quickly as before, and that signals to marketers that we need to find different sources and ways to ensure our games are visible to players at the right time and from the right source.”

DENIZ KEKEÇ  
Performance Marketing Manager, Innogames

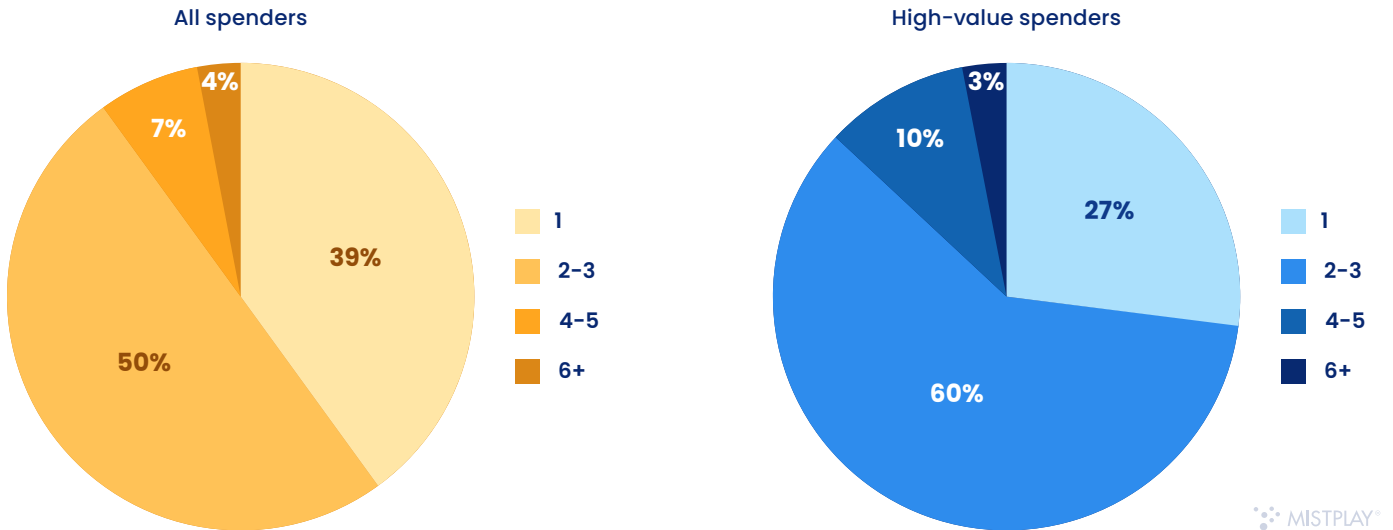
Close to half of High-value spenders (41%) plan to decrease their spending in 2024 – with 23% of them planning to spend *much* less. What other behavioral shifts are on the horizon?

[Read more in Chapter 4:  
The future of mobile gaming spending >>](#)

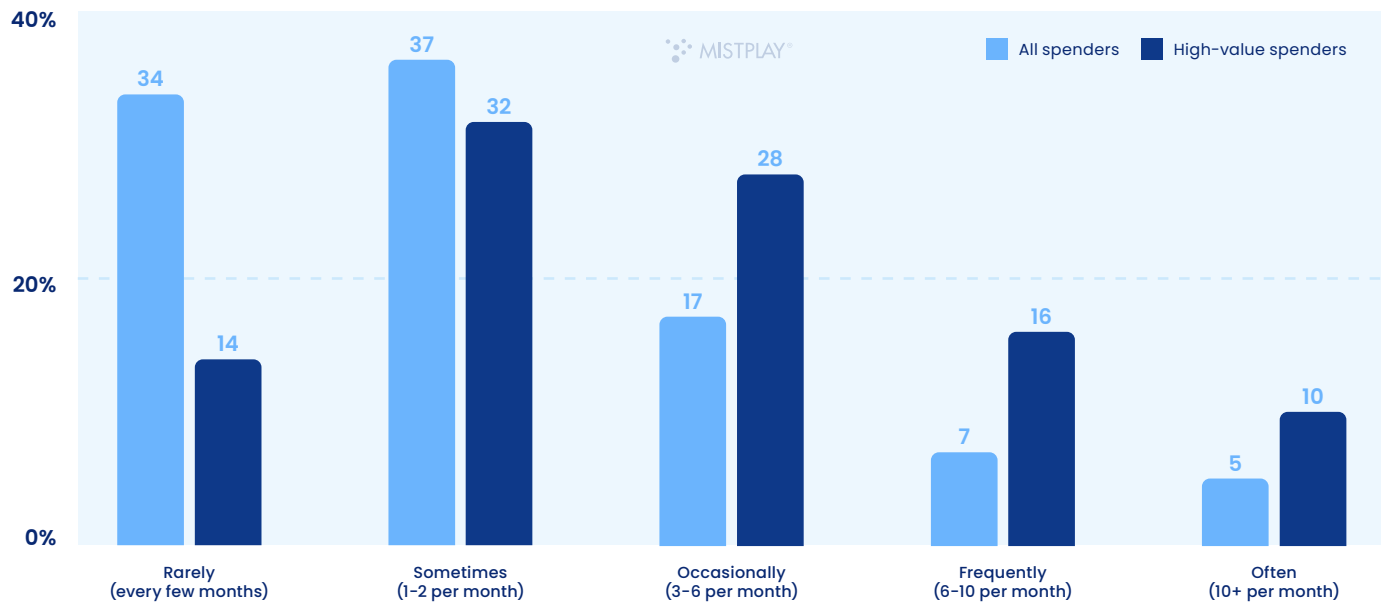




## Average number of games spent in per month

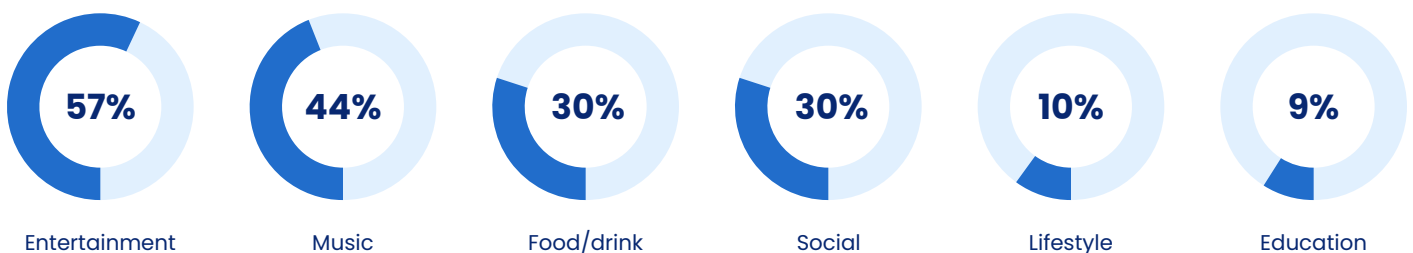


## How often spenders make in-game purchases



Lucky Lucy spends in more games, more frequently than the average spender, being the least likely to spend in only 1 game (26% vs 39% average), and most likely spend in 6+ mobile games (7% vs 4% average) and make 3+ purchases per month (40% vs 29% average).

## Most popular app categories spenders also spend in





# Acquiring spenders

Paid ads remain the bedrock of game discovery and, in today's evolving landscape, marketers must leave no stone unturned while contributing to profitable growth. Effective creative should be accurate and tailored to spenders' underlying motivations while word-of-mouth marketing strategies driven by player loyalty, like referrals, can unlock extra value.

- While 20% of spenders only pay attention to ads if they are seeking new games, 26% will actively engage if it's appealing, which aligns with the top reasons for spenders to click and download being relevant gameplay (72%) and eye-catching visuals (32%)
- 80% of spenders say one of their primary motivations to play mobile games is for Relaxation, with other top choices being Fantasy (53%) and Progression (43%)
- 73% of spenders have installed at least one game from a referral in the past year, with 31% installing three or more



"Referrals represent a valid strategy that games will need to focus on more, especially when we're discussing the increasing need for first-party data. Looking at it through this lens, referrals are more cost-efficient and can really help games grow their user base and help marketers when it comes to attribution."

FAITH PRICE

Director - Growth Marketing, DoubleDown Interactive

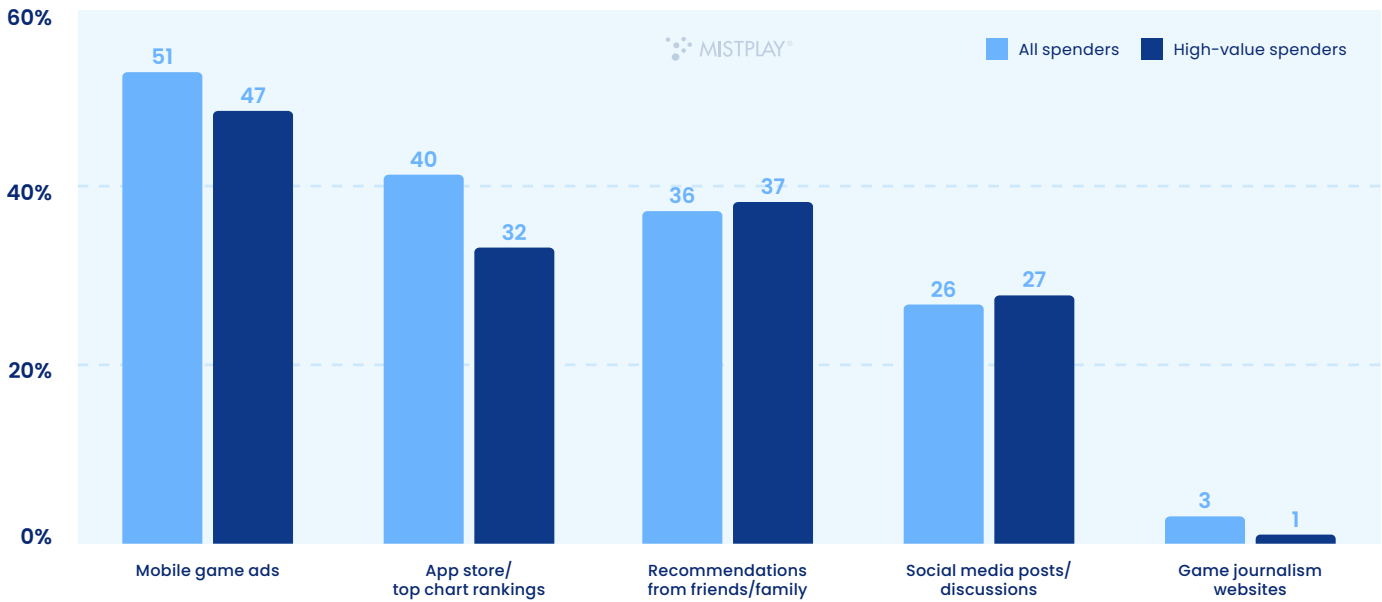




## GAME DISCOVERY

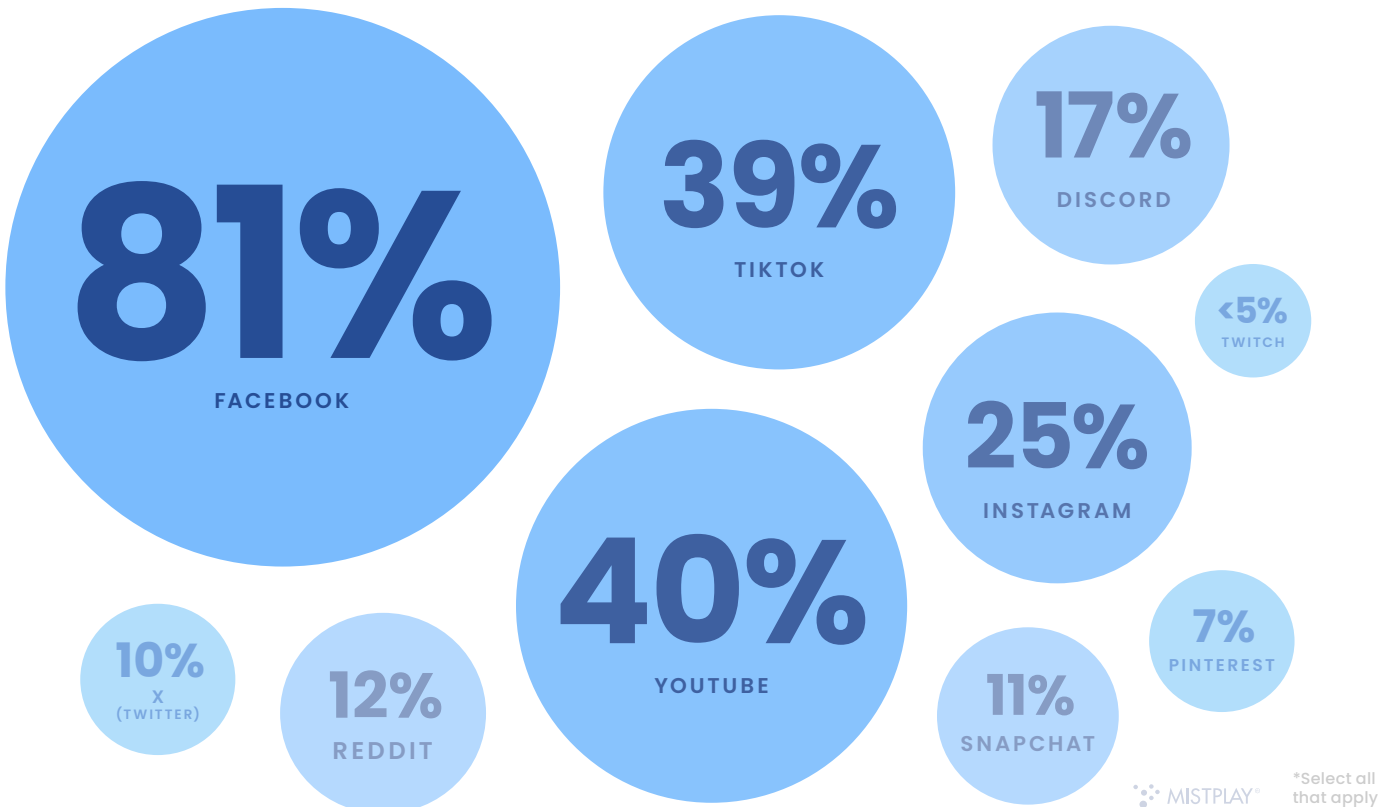
### Main ways spenders discover new mobile games to play

Select all that apply



"I look up games similar to the ones I play regularly." – Anonymous Mid-value spender

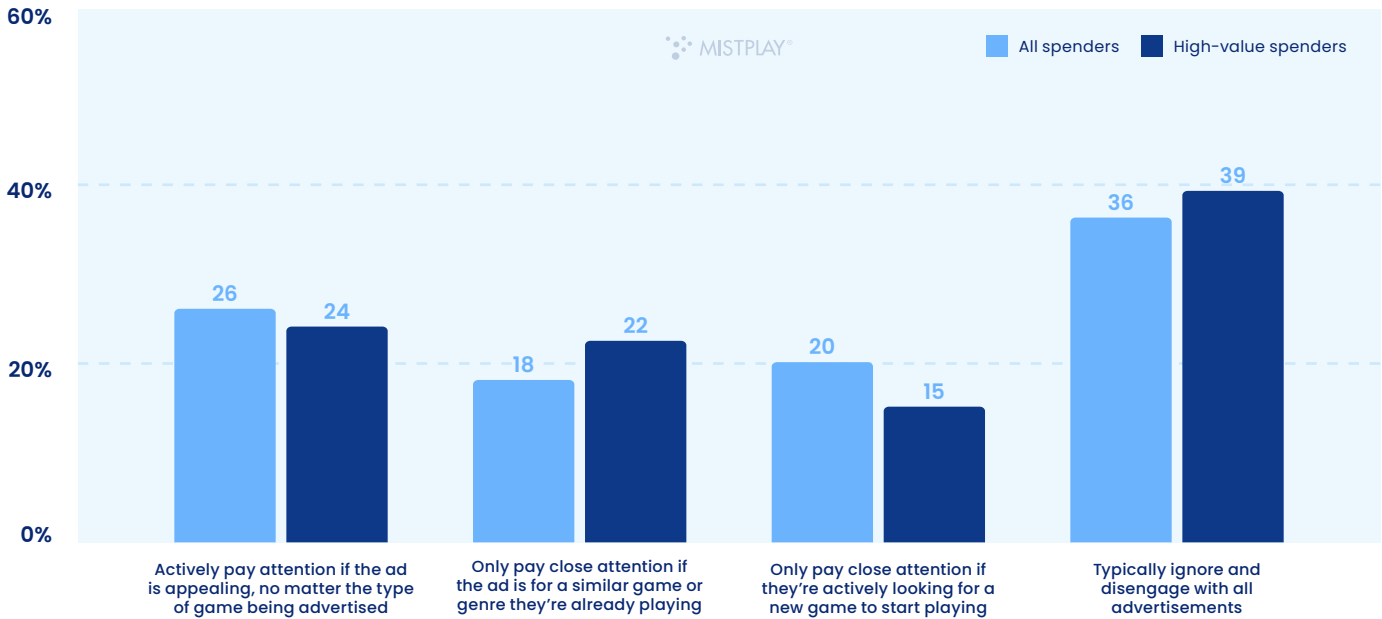
### Top 10 social channels for spenders to discuss and discover mobile games\*





## ADS

### What spenders do when experiencing an ad in the game they're playing

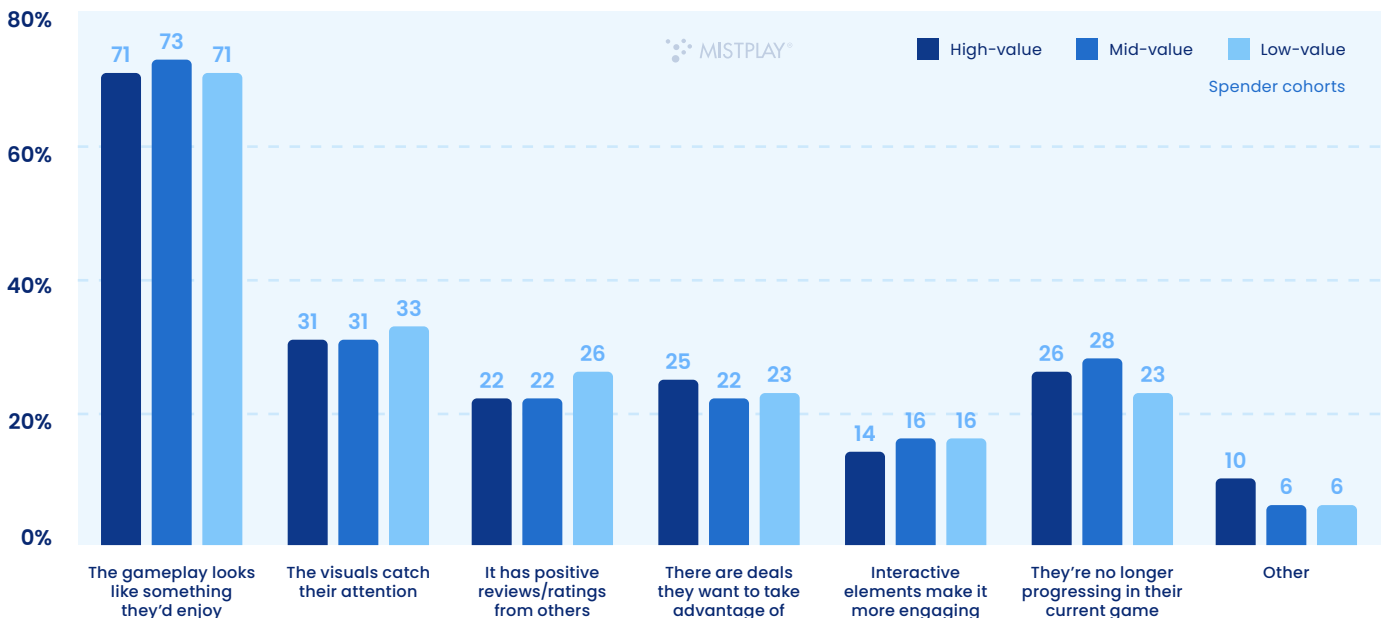


### How long a spender needs to see ads before installing the game\*



### What motivates spenders to click on an ad and download a new game

Select all that apply



Midcore Mike is more swayed by eye-catching visuals and strong graphics than the average spender (40% vs 32%).

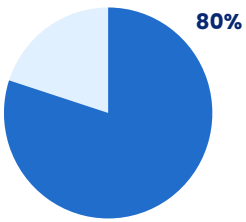


"What I want to see more of in mobile games in 2024 is games where the actual play is exactly like the ads."  
– Anonymous Mid-value spender



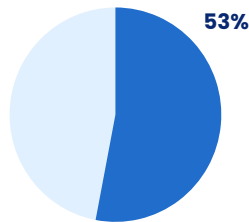
## The top motivations for spenders to play mobile games are...

Select top 3  
MISTPLAY®



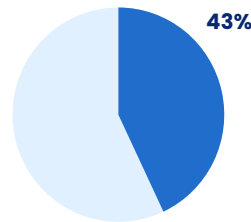
### RELAXATION

Pass time & be entertained



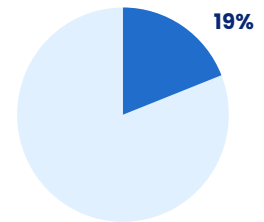
### FANTASY

Seek new virtual worlds and experiences



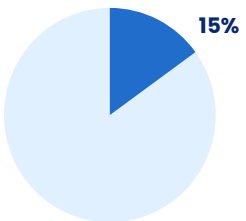
### PROGRESSION

Building, managing, improving things



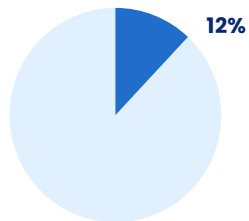
### DISCOVERY

Learn and discover new things



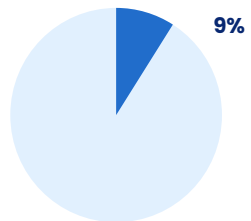
### SELF-EXPRESSION

Creativity and identity



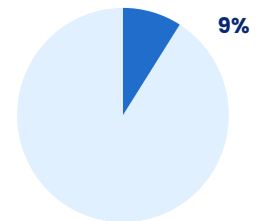
### POWER

Gain power, control, and top rank



### SOCIAL CONNECTION

Bond with old and new friends

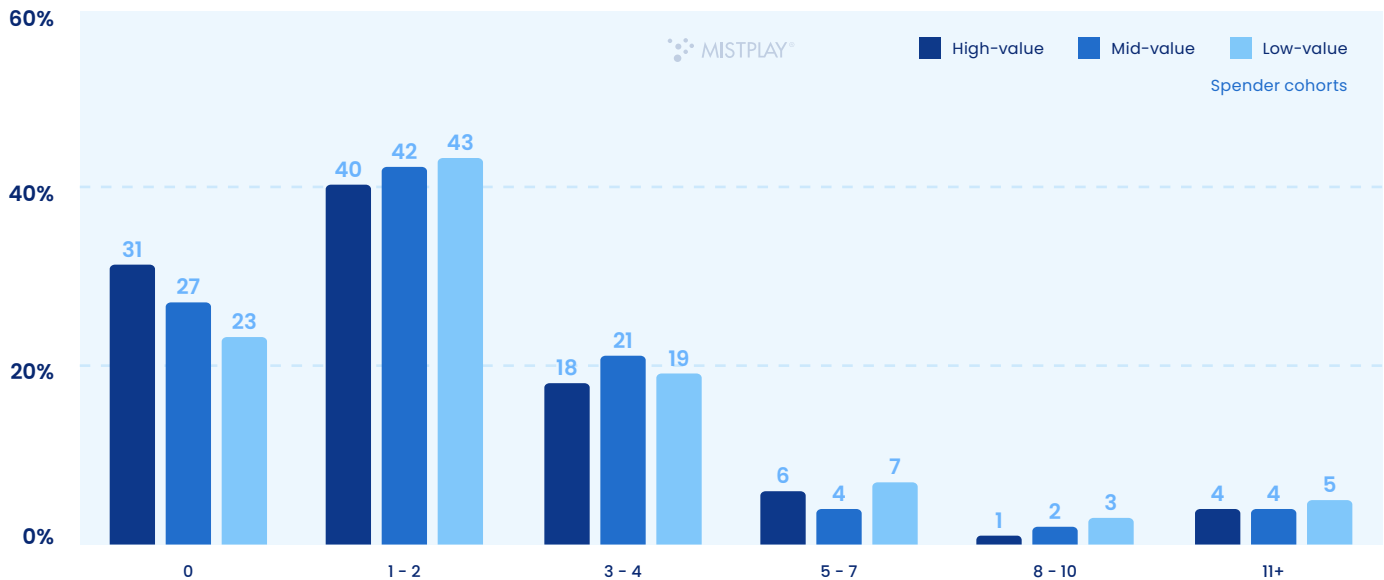


### EXPERTISE

Become the best at something

## REFERRALS

### How many games spenders have installed in the past year from referrals



Lucky Lucy is the most likely to engage with referrals, with 17% installing at least 5 referred games in the last year (compared to 12% average). Casual Candace is the least likely, with 27% not installing any referred titles (compared to 21% for other personas).

# 2 Increasing player LTV

## Encouraging spenders to invest

With increasing competition for players' share of wallet, it is crucial publishers focus on optimizing the first week of the user journey to lay the foundation of long-term loyalty and spending. While initial engagement may be fueled by novelty, true retention (and subsequent spend) lies in carving out a value-driven path of progression by balancing game design with strategically enticing IAP offers to nurture players' motivation to come back daily while creating avenues to spend. Winners who drive outsized performance will be those who invest in personalization capabilities that allow for tailored offers to the user segment or individual player.

- In total, only 18% of mobile spenders will make their first purchase within the first couple days of playing – spenders are more likely to purchase within the first week (36%) or first full month (79%) of playing
- Only 8% of spenders impulse buy items they desire, while others purchase to take advantage of a good deal when it appears (33%) or purchase in order to progress (25%)
- The leading motivator to spend is to enhance gameplay progression (54%), followed by personal enjoyment/satisfaction (44%)
- Personalized in-app offers are the most likely to influence additional spend according to roughly 40% of spenders, and when it comes to external factors, 69% of spenders report they aren't influenced at all by other players

“Players accept offers when they are convinced they are good for them. This is why we will hear more about the importance of personalized offers. These offers might not have to be unique to each user, but they should be based on past purchases or gaming behavior data.”

**DENİZ KEKEÇ**  
Performance Marketing Manager, Innogames

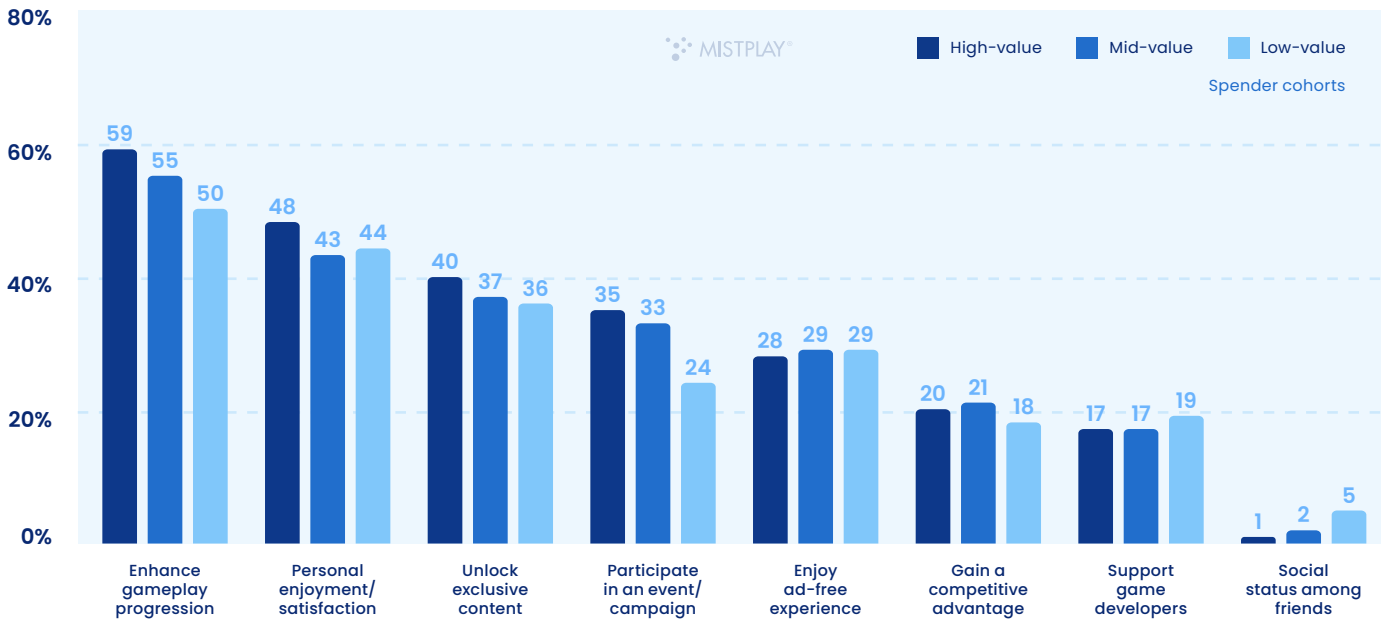




# WHY SPENDERS SPEND

## What motivates spenders to spend in a mobile game

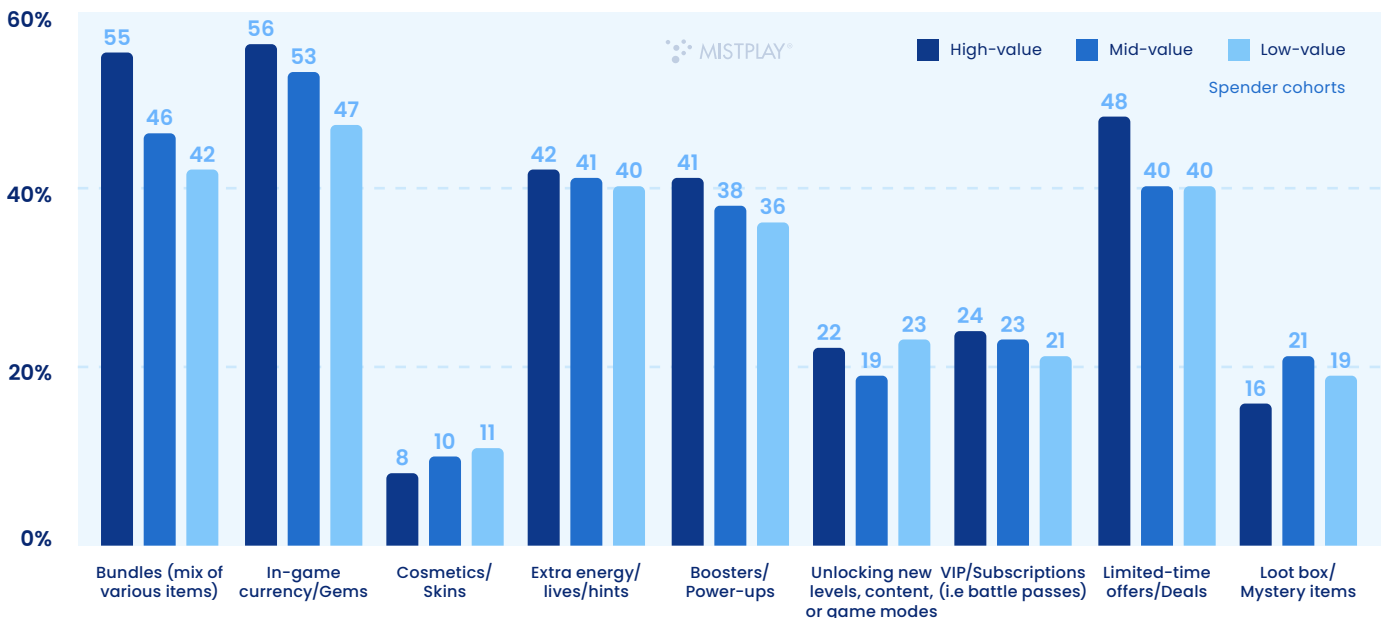
Select all that apply



"Paying for an ad-free experience was my most worthwhile purchase. It was worth not having to watch ads to progress. The more ads a game has, the more likely I am to quit playing before making a purchase." — Anonymous Mid-value spender

## What types of IAP spenders purchase in mobile games

Select all that apply



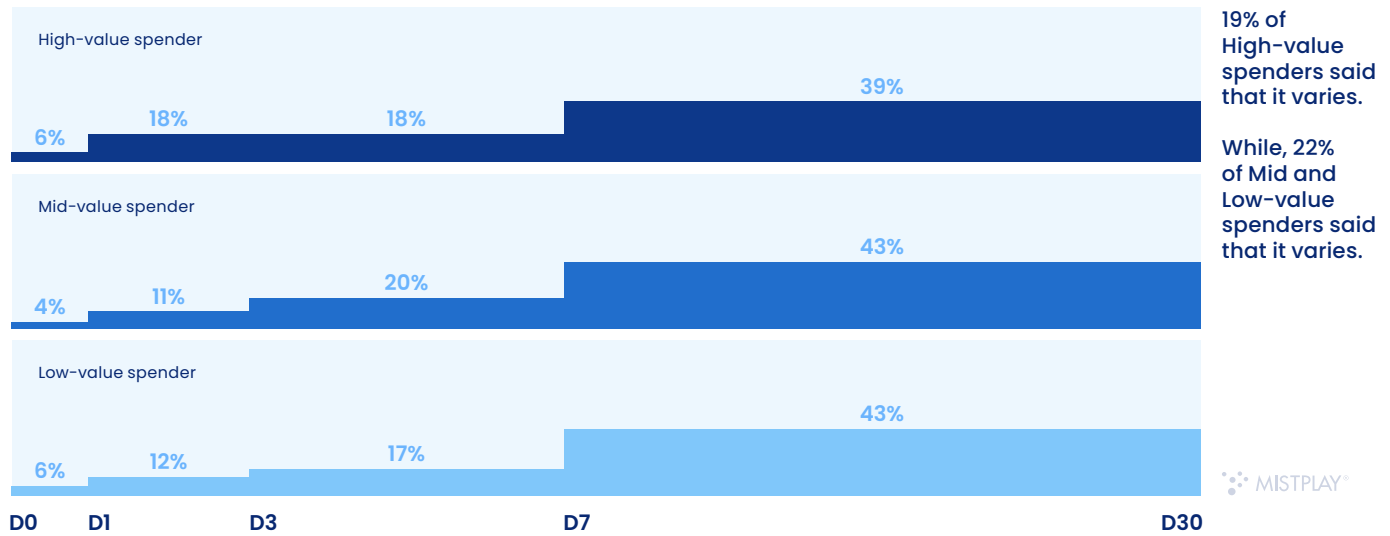
Midcore Mike has a higher propensity to spend on VIP/Subscriptions (35% vs 23% average) and Cosmetics/Skins (20% vs 10% average). They are also more likely to be motivated to spend to support game developers (28% vs 18% average).



## WHEN THEY SPEND

### How soon spenders make their first purchase within the first 30 days

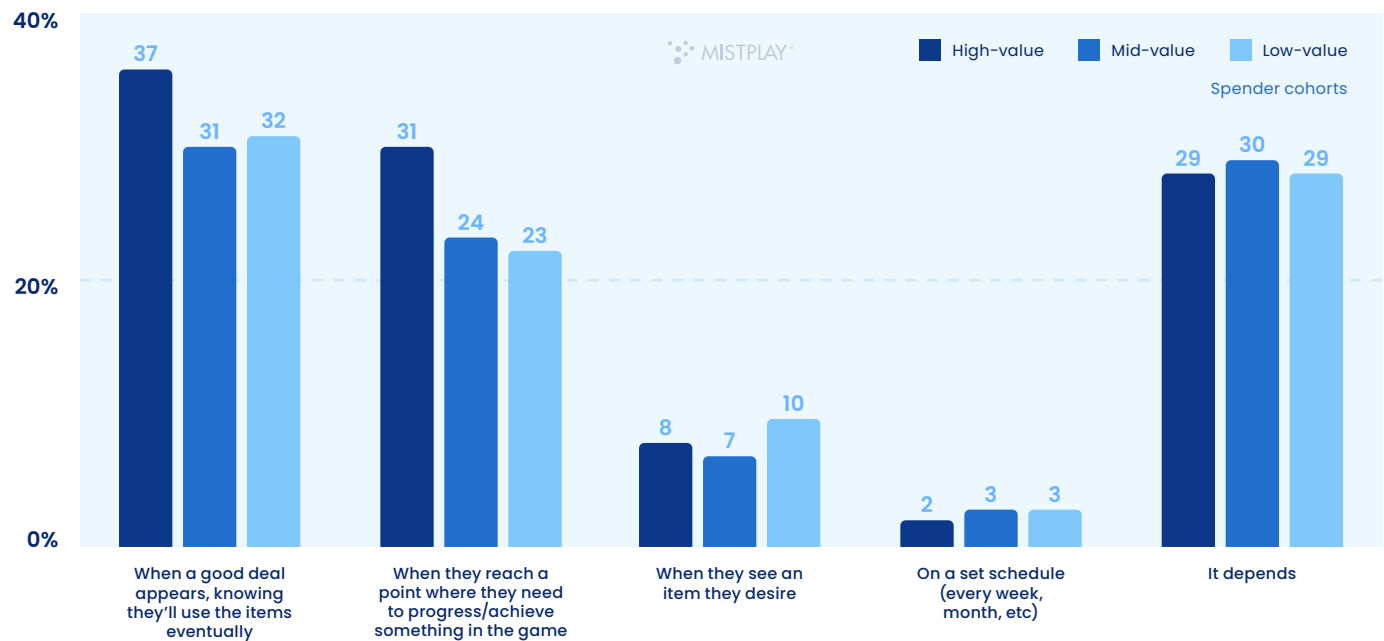
If they enjoy the game



"It depends on how much I like the game, how much I want to progress, and what I expect to gain from the bonus material I'm buying." – Anonymous Mid-value spender

### When do mobile game spenders make a purchase

Select all that apply



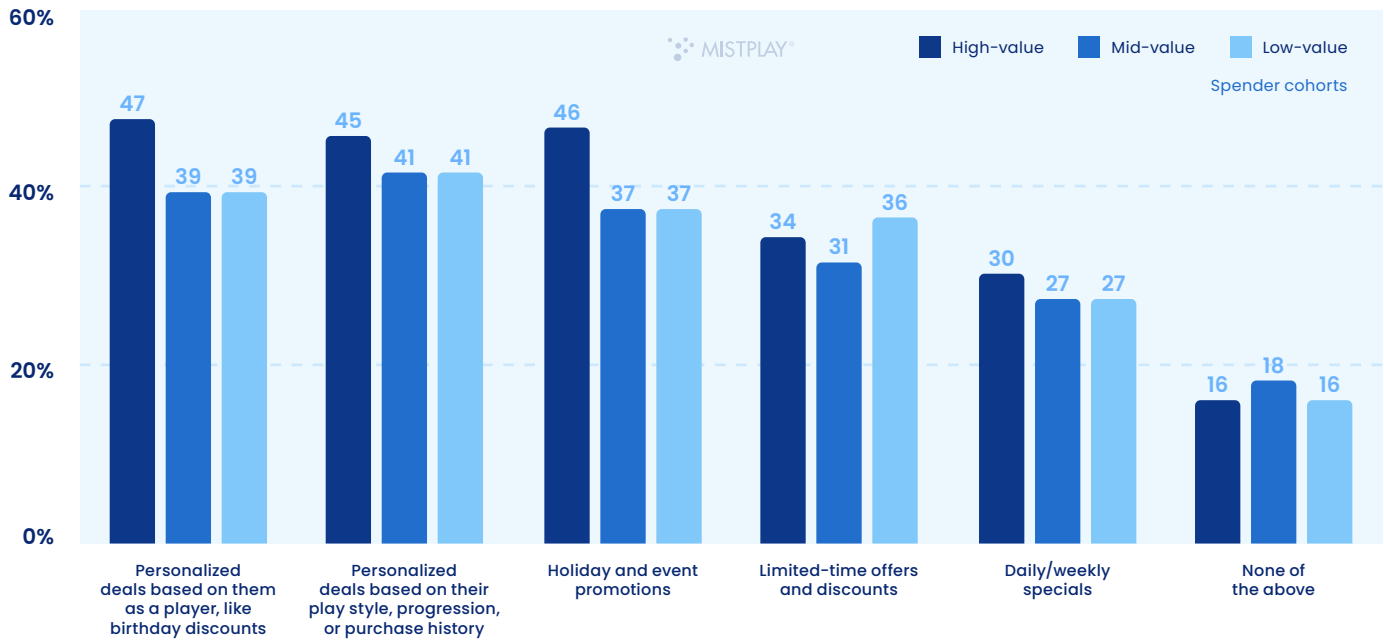
Casual Candace takes more time than other personas to warm up to their first purchase, with only 4% making their first purchase within the first couple days (compared to 7% of other personas).




# INCREASING INVESTMENT FROM SPENDERS


## What types of IAP offers would influence increased spend in games

Select all that apply



 **Midcore Mike is more likely to spend on limited-time offers (41% vs 33% average) and holiday and event promos (43% vs 39% average).**

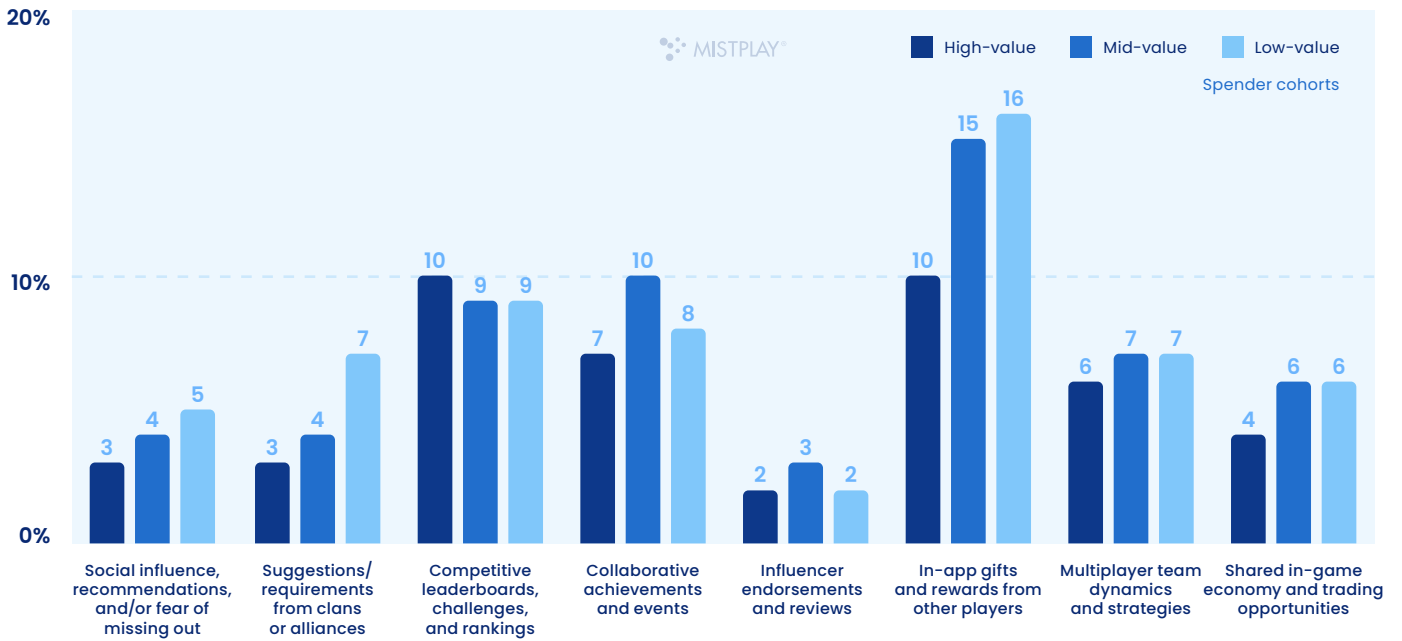
 **"I want a variation of in-game events, not just the same concepts reskinned."**  
– *Anonymous Mid-value spender*

 **"I would be influenced to spend more on forever items – things you buy once to improve game enjoyment and quality of life."**  
– *Anonymous High-value spender*

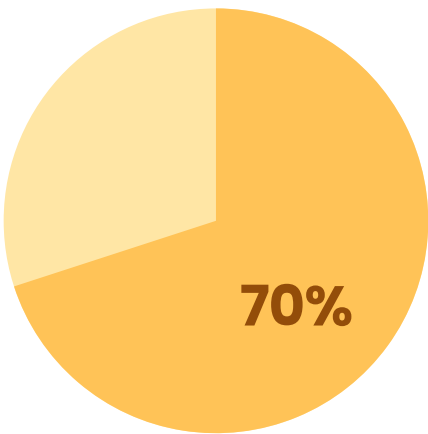


# How other players influence spenders' purchase decisions

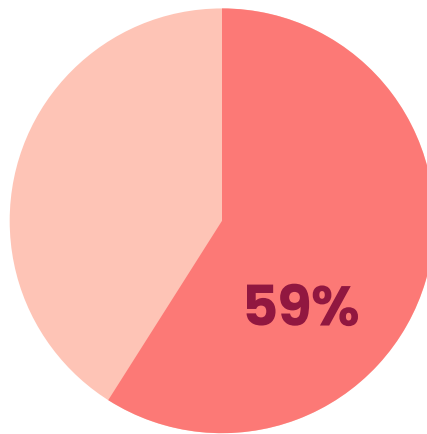
Select all that apply



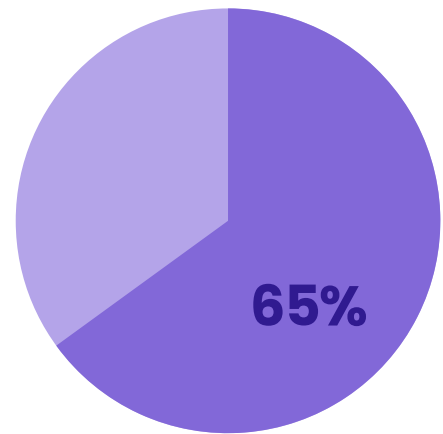
OF CASUAL CANDACES...



OF MIDCORE MIKES...



OF LUCKY LUCYS...



...are not influenced by social factors in their spend decisions

MISTPLAY



Midcore Mike is more influenced by social factors due to the multiplayer nature of their preferred genres, particularly by multiplayer team dynamics (12% vs 6% average) and collaborative achievements and events (13% vs 9% average).



# Engaging and retaining spenders

While in-app promotion remains tried and true, the industry may be overlooking a range of engagement strategies that could drive layers of meaningful impact. Considering initiatives like lifecycle email marketing and robust loyalty programs could offer publishers the chance to elevate engagement levels and minimize negative purchase experiences.

- While in-app promotion is the most popular choice for spenders to hear about offers (39%), emails come in second at 25%, followed by social media at 18%
- Nearly 60% of High-value spenders report they'd be more likely to spend in games if they could receive redeemable points or monetary rewards from their purchase, alongside half of overall spenders
- One out of five spenders (20%) report that spending negatively affects their experience



Loyalty programs have been around for a while...But what is new is the feeling that adding a loyalty program is the minimum you have to offer. It has become the baseline by which all games have to measure themselves, and part of the offer games have to make because it speaks directly to the players and what they want – especially since the players' decision to spend isn't influenced by others as much as the kind of deal the game itself offers.

It's [also] clear here that there are more channels to consider and more reasons for marketers to diversify their portfolio of channels. Part of this is to re-examine organic and broaden our horizons to find new ways to stimulate referral rates, for example."

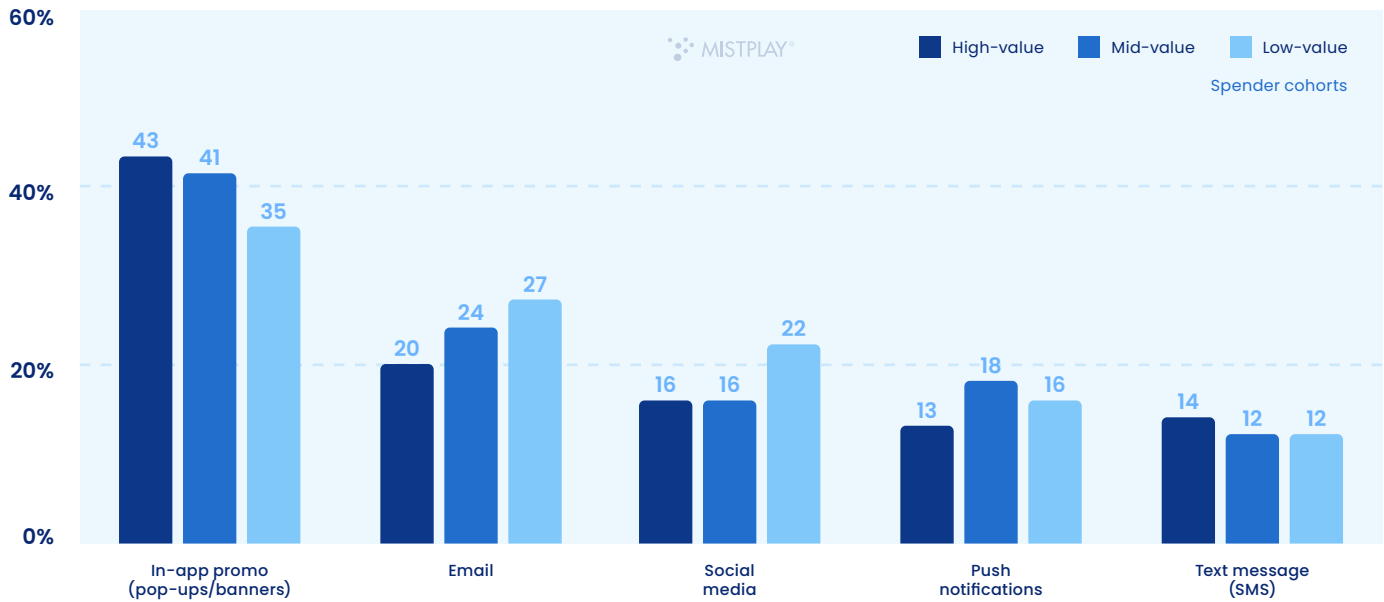
GUS VIEGAS  
VP – Marketing, Cosmic Lounge



## PROMOTIONAL CHANNELS

### How spenders prefer to find out about IAP offers

Select all that apply



Lucky Lucy is the most open to receiving offers through omnichannel marketing such as texts (19% vs 13% average), emails (36% vs 24% average), and push notifications (21% vs 16% average).



"I prefer for there not to be pop-ups, but instead have tabs on the side or top [of the screen] for promotions." – *Anonymous High-value spender*

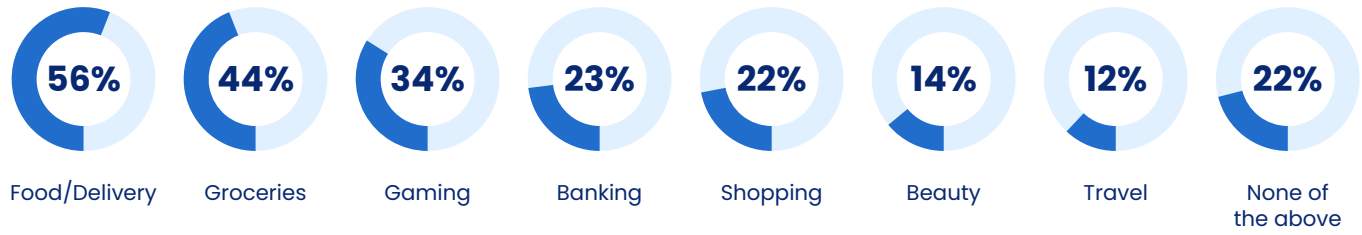




## LOYALTY PROGRAMS

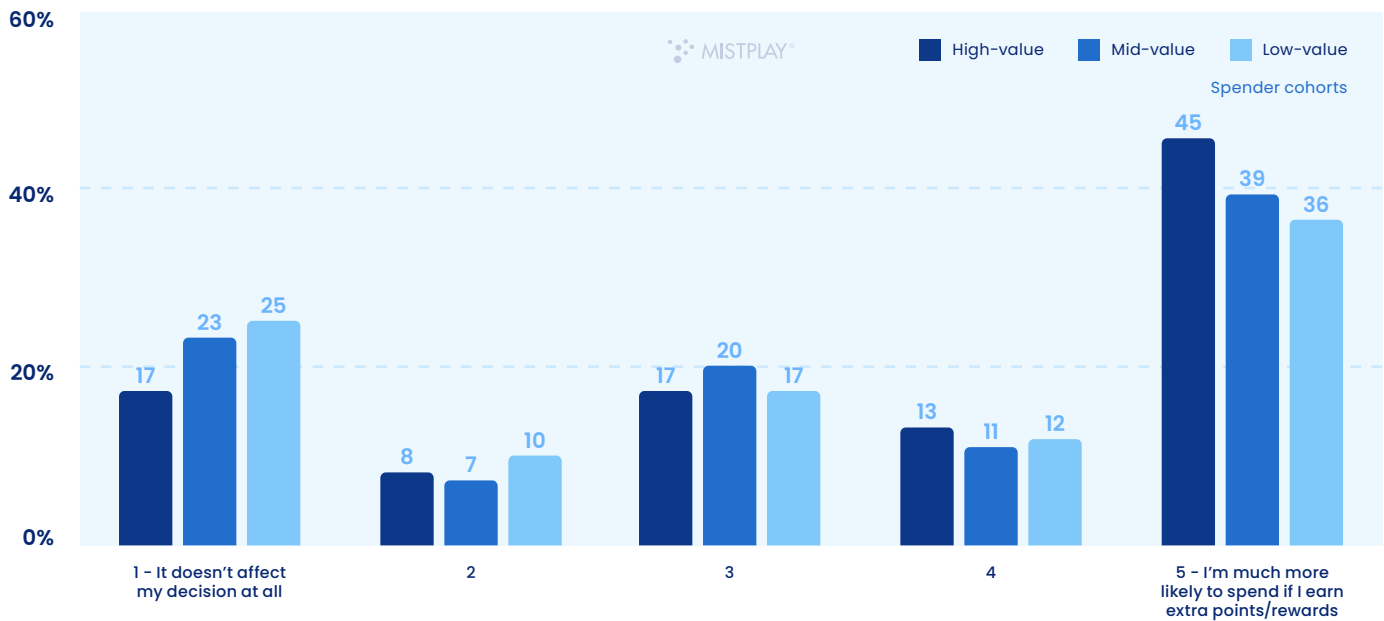
### Types of loyalty programs spenders commonly engage with\*

MISTPLAY\*



\*Select all that apply

### How loyalty programs in games would affect a spenders' likelihood to spend\*



\*Earning rewards like gift cards or in-game currency redeemable for in-game items

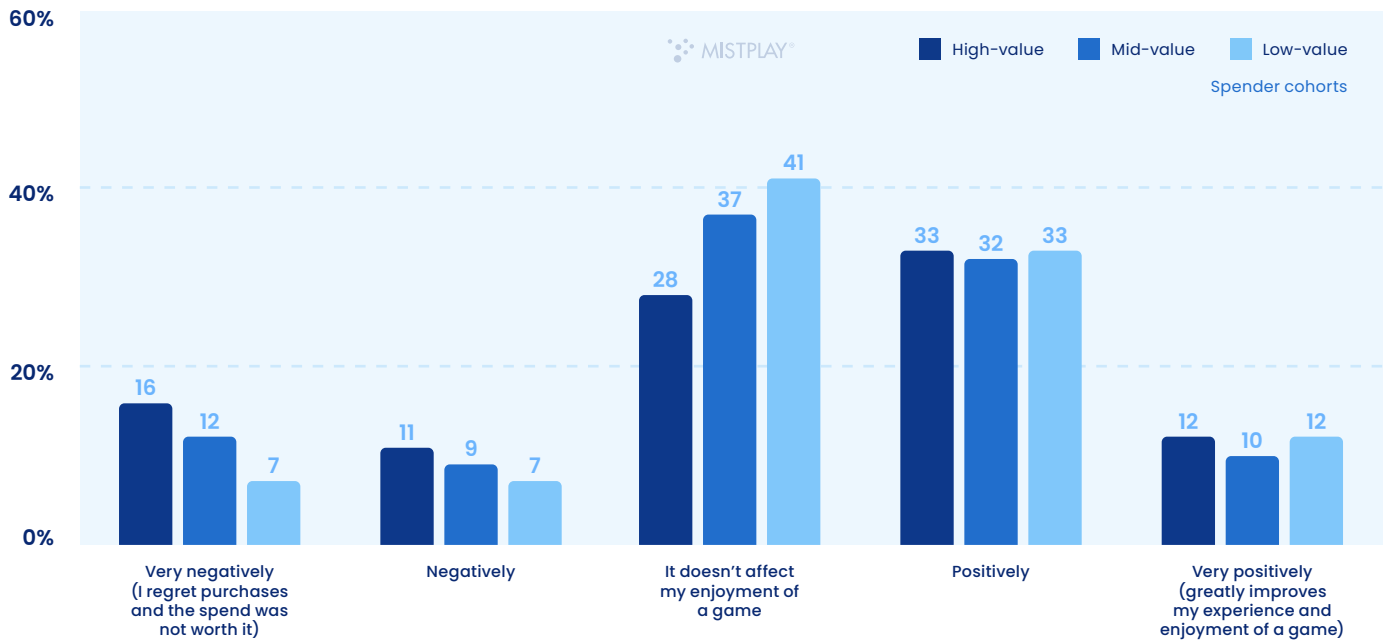


"What I want to see more from in mobile games in 2024 is the ability to make money while I play. I definitely spend more time playing with this incentive." – Anonymous Mid-value spender



## IMPACT OF SPENDING

### How in-game spending affects spenders' enjoyment of a game



A large part of retaining spenders is minimizing buyers' remorse, and with High-value spenders being the most likely to have an overall negative connotation between spend and enjoyment (27%), it's important to consistently evaluate the price-to-value ratio of your IAP.



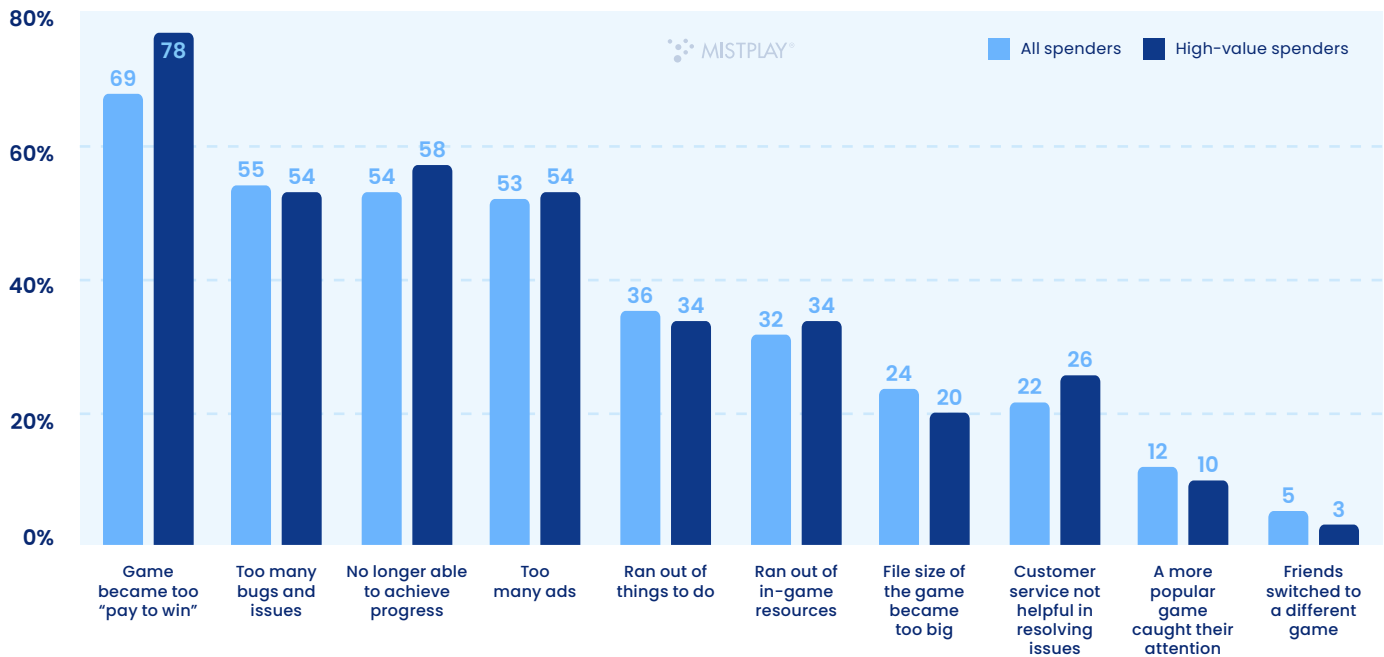
"The most worthwhile [purchases] to me are the **ones that last a while**, so the benefit is not here and then gone quickly" - *Anonymous Mid-value spender*



# CHURN

## Reasons a spender would stop playing a mobile game

Select all that apply



## What makes players stop spending in their favorite mobile game



"When I feel like it is rigged to make me keep spending" – *Anonymous High-value spender*



"Tired of spending money and not getting anywhere in the game. Game becomes a waste of time and money and ends up getting deleted" – *Anonymous Mid-value spender*



"Outrageous prices. I can spend .99 cents on a bundle of gems and sorts without blinking an eye but when you're asking for 9.99 a pop it's a no go for me." – *Anonymous Low-value spender*



# 3 The state of mobile game spending today

Understanding modern spender behavior and preferences across different genres in mobile gaming is crucial for publishers to draw inspiration from as they optimize IAP strategies effectively. Refining the delicate balance between engagement and monetization is key to driving player loyalty and LTV, highlighting the need for comprehensive approaches that cater to player preferences and motivations.

- Puzzle leads the pack in average playtime thanks to mass appeal and intuitive gameplay features, but it's notable across a variety of genres that there's not always a correlation between engagement and monetization cohorts
- High-value spenders index towards spending the most in RPG and Strategy games, fueled by compounding monetization systems and social features that link to deep progression and competitiveness
- Lifestyle stands out as a top genre that can effectively nurture spend among Mid-value spenders and Low-value spenders by driving incremental spend through monetizing on emotion alongside bite-sized content and compelling-repeatable gameplay



"For games in the casual and mid-core space, progression is hugely important. Some will spend money to get to their goal faster, and some will spend their time. Many players would rather spend money than spend time to move forward in a game if they feel like they are getting a valuable offer, and that's where game developers should focus and do more A/B testing to find what is right for them."

**FAITH PRICE**

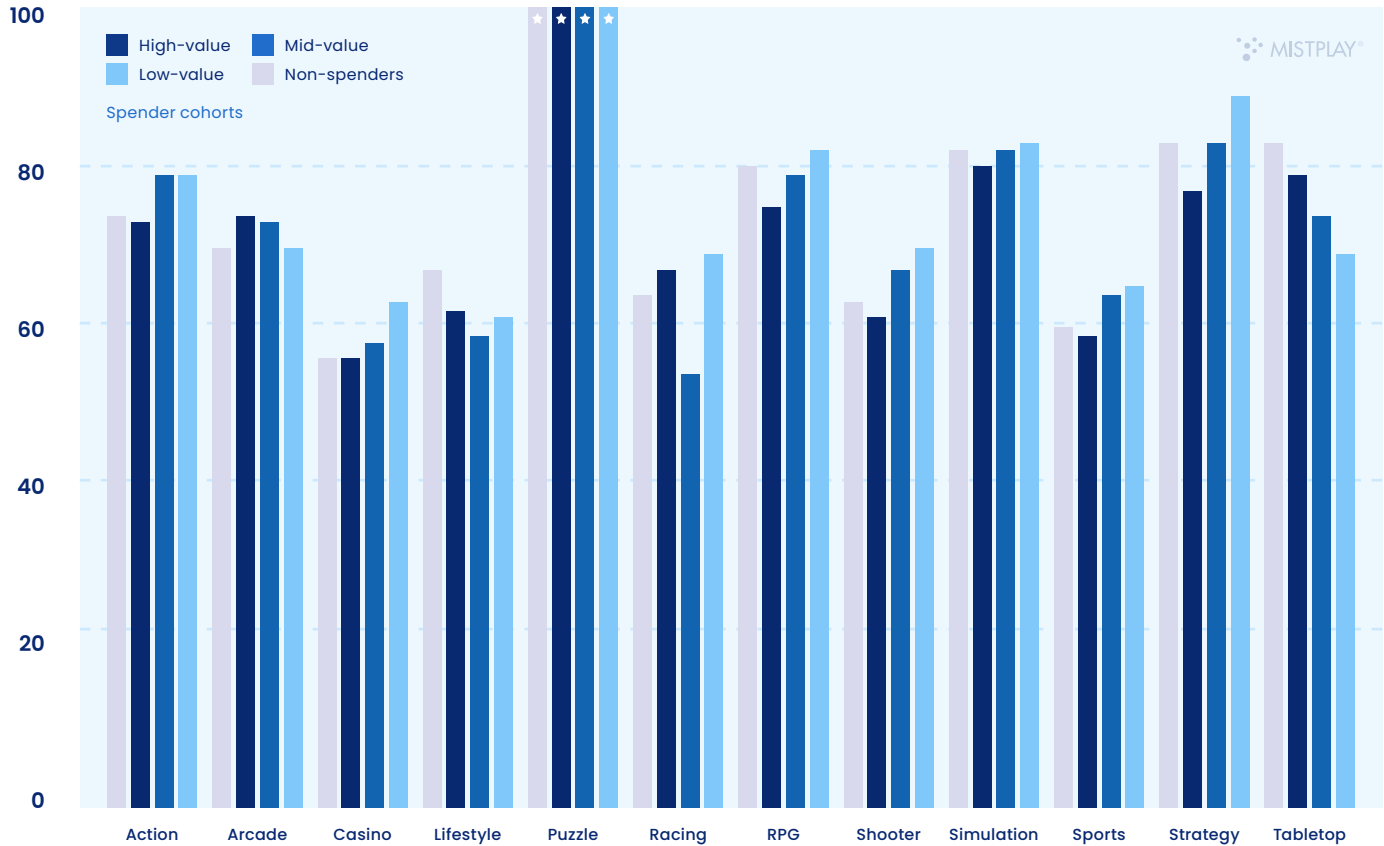
Director - Growth Marketing, DoubleDown Interactive





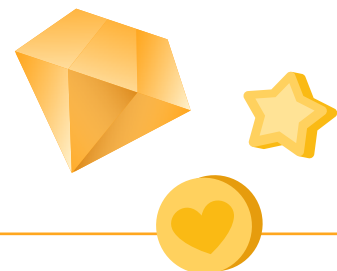
**Note:** Our indexing method utilizes the top genre as a reference point to determine each other genre's position. The index value between 1-100 indicates the rank of each genre relative to the top genre.

### Average playtime per spender cohort (indexed)



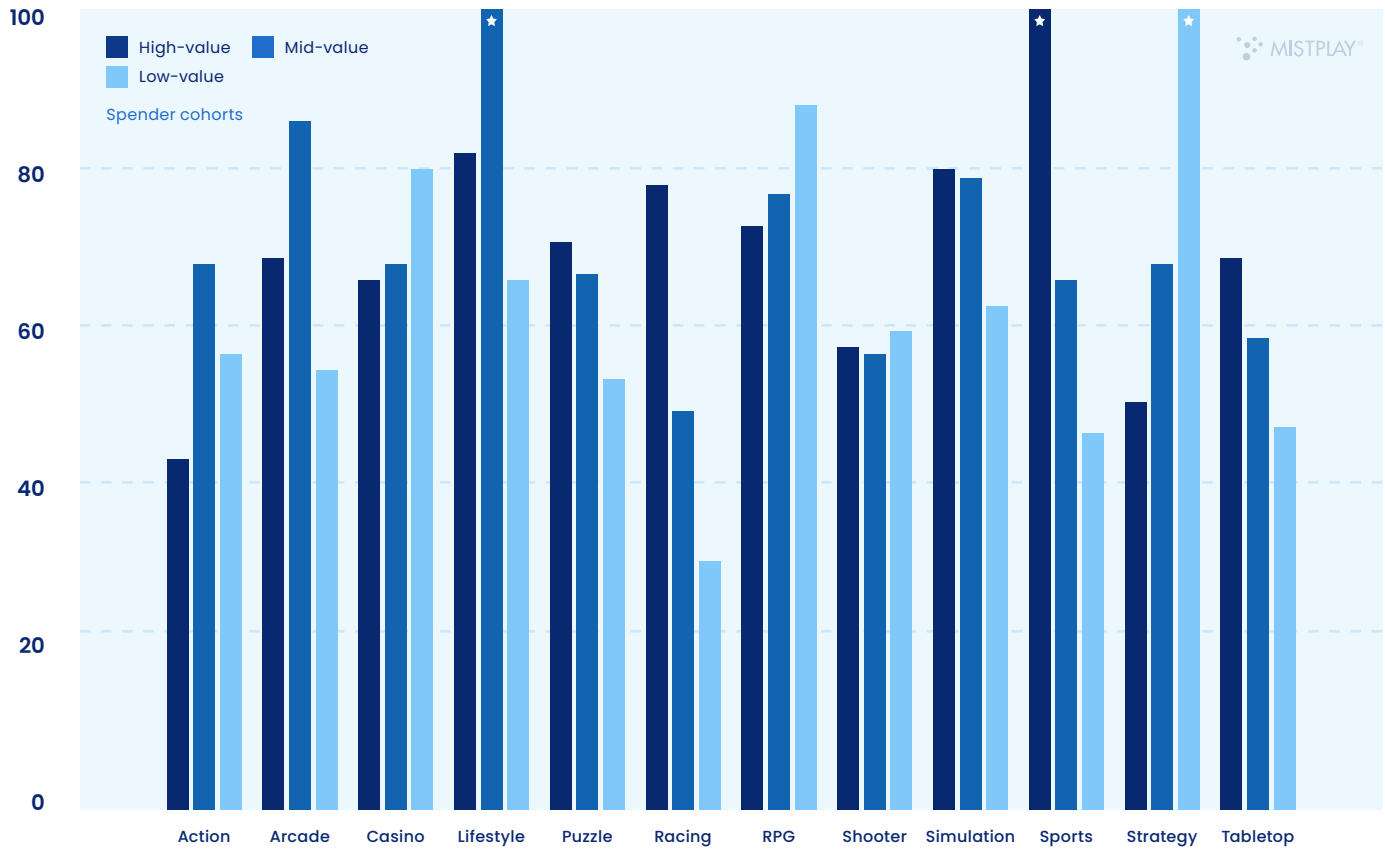
Want to learn more about engagement and monetization for mobile gaming?

[Check out our 2023 Mobile Gaming Loyalty Report.](#)

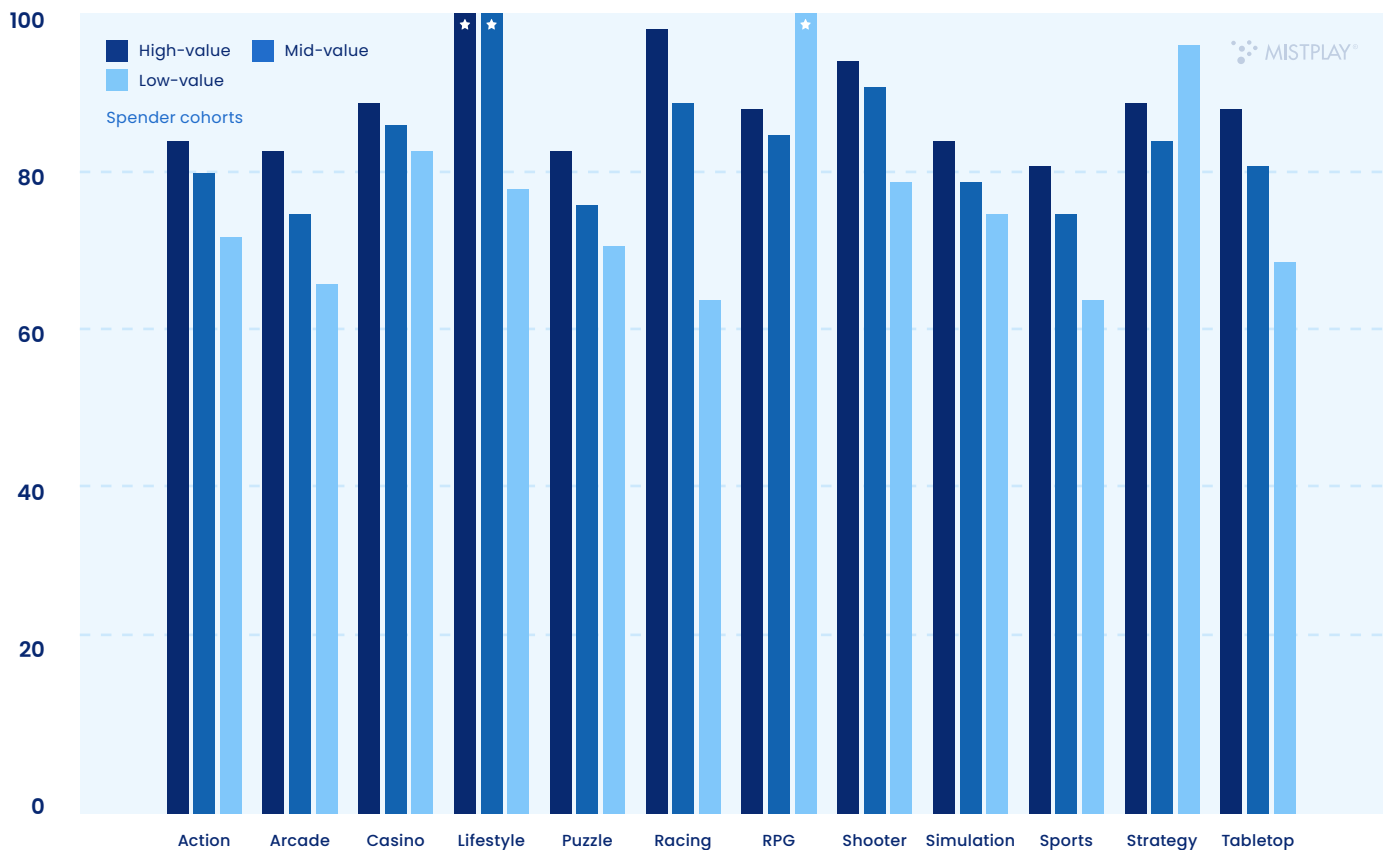




## Average spend per spender cohort (indexed)



## Average number of purchases per spender cohort (indexed)





# 4 The future of mobile game spending

Game spending is closely tied to disposable income, and with data.ai's [State of Mobile 2024](#) highlighting that recent economic headwinds disproportionately impact mobile games, it's clear that the current economy and inflation will continue to have a major impact on the industry. Spenders themselves support this claim, as many plan to reduce spending this year.

“Yes, it is true that players will spend less, and we have a very unstable economy ahead of us. And this amplifies the importance of finding new ways and new placements for advertising and offers that allow us to find new pockets of profitability and revenue.”

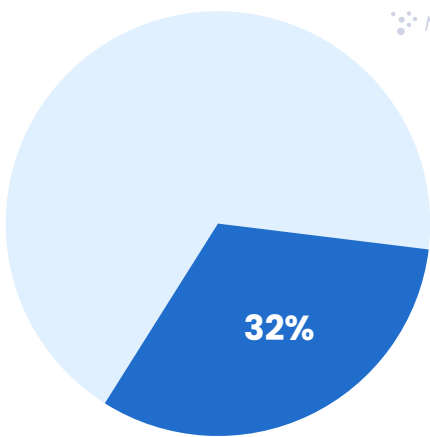
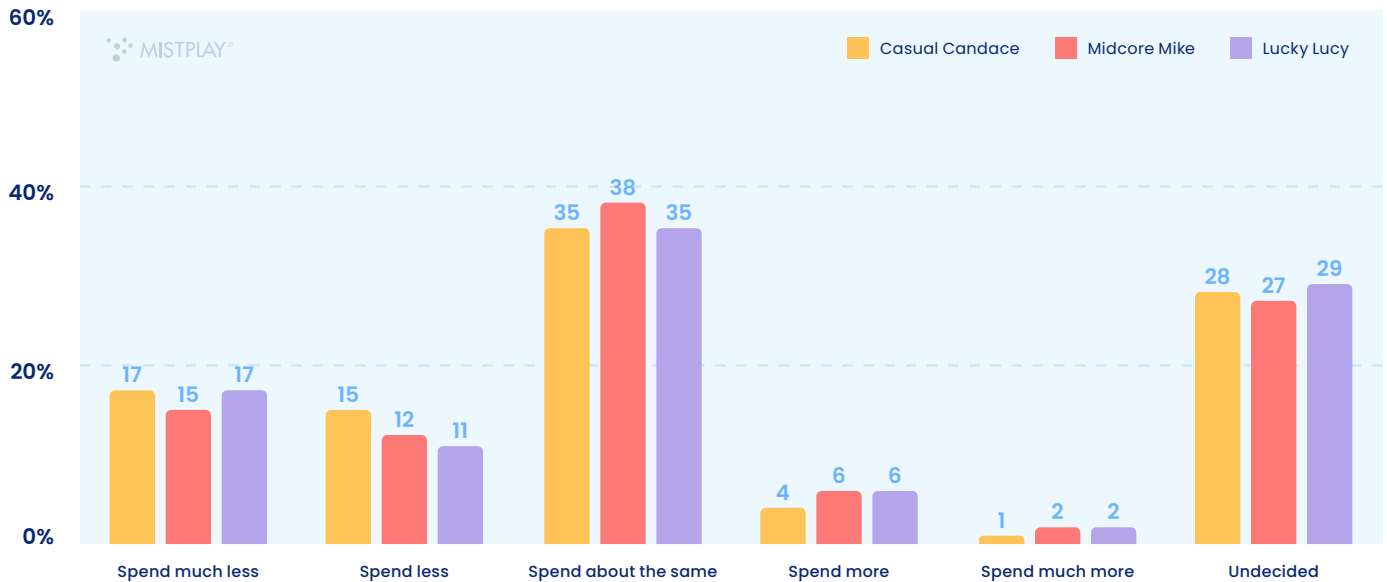
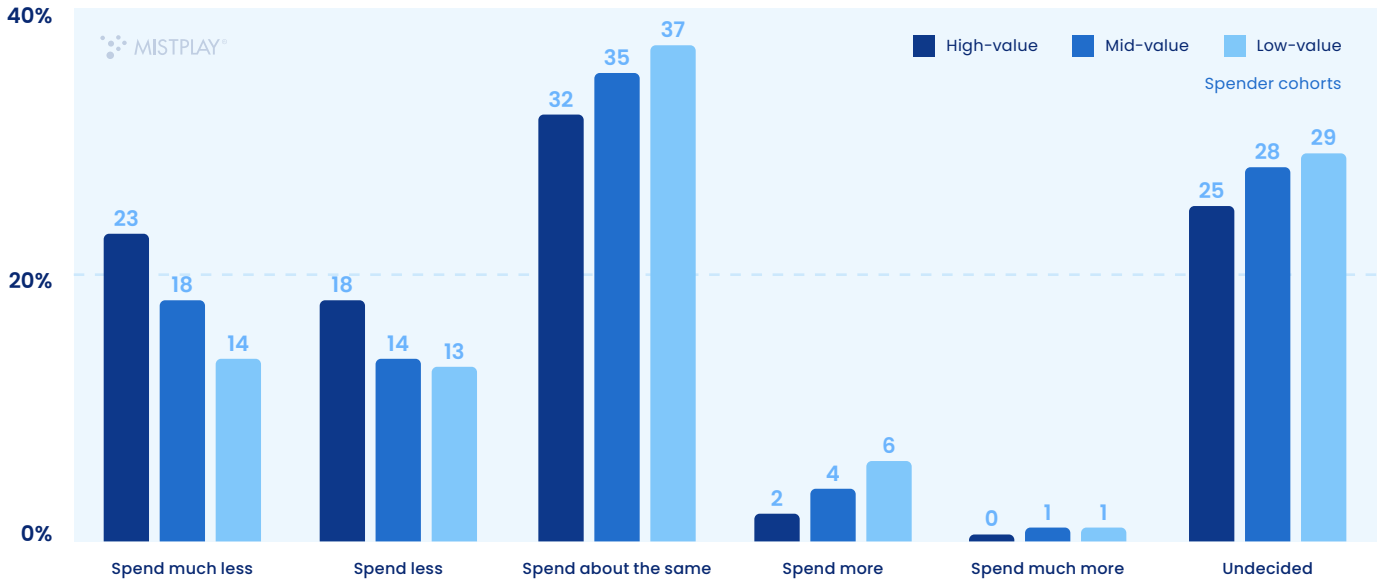
SMITH STEPHINESON DELA PEÑA  
Senior User Acquisition Manager, Gameloft for Brands

“The economy is more challenging, and to get players to spend more, you need to be more precise and personalized on the offer you make—and this means you need to better understand user behavior.”

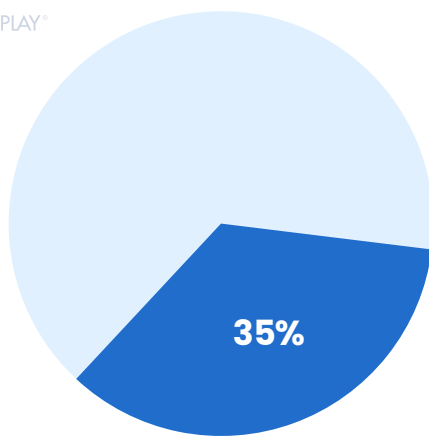
GABRIEL SILVA  
User Acquisition Specialist, Miniclip



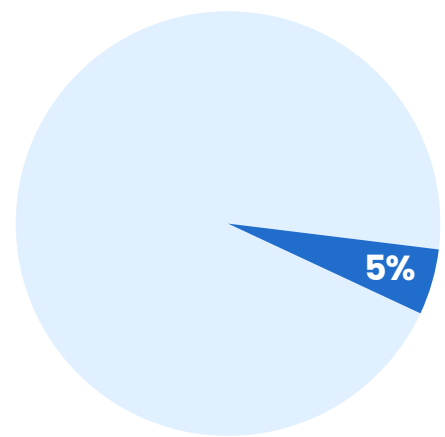
# How mobile game spenders plan to evolve their spending in 2024



**SPEND LESS**



**SPEND THE SAME**



**SPEND MORE**

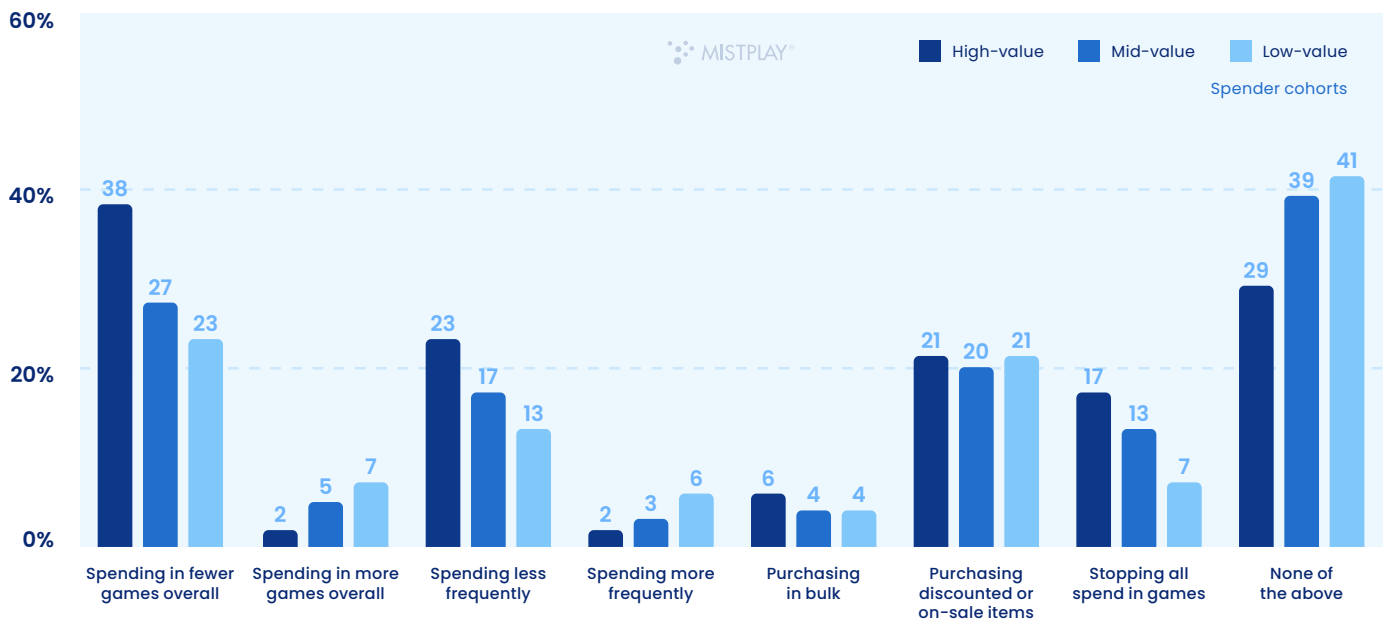


As we move forward into 2024 and beyond, mobile game publishers will continue to face increased competition for player wallet share and brand loyalty. With numerous games and genres vying for a limited pool of player spend, and players tightening their budgets given the current economy, publishers need to strategically position themselves to build long-term loyalty and ultimately scale in a sustainable manner.

This changing landscape demands innovative approaches to IAP strategies, urging publishers to explore tailored offers, robust loyalty programs, and new lifecycle marketing channels to encourage sustained player investment in the years ahead. There may be even more flexibility in adopting these strategies alongside the increasing shift towards direct-to-consumer (DTC) web shops, which can yield revenue increases of **up to 25%** for top publishers.

### How else might spender behavior change in 2024?

Select all that apply



“What I want to see more of in 2024 is affordable prices. Everything has gone up. People want a way to get away from day to day stress, games are a great way to do that. Developers need to get paid as well. At this time it might be worth it for more games to test out the lower cost but more frequent purchases route for income.” - *Anonymous Mid-value spender*



# Methodology

We surveyed roughly 2,000 mobile spenders, aged 18+, in the US and Canada who were active in the Mistplay platform in Q4 2023. The survey ran between Dec 2023 - Jan 2024.

We categorized respondents by lifetime spend in mobile games and segmented into 3 groups\* in order to capture a broad range of trends and insights:

- High-value spender: \$100 USD+
- Mid-value spender: \$10-99 USD
- Low-value spender: <\$10 USD

"Other," including open responses, were available for relevant questions but the results were insignificant and thus omitted in the charts.

For categorical and Likert scale questions, the Top-2-Box or Bottom-2-Box analysis method was used to summarize survey responses to measure the overall preference or dislike.

Indexed data for playtime and spending behaviors in Chapter 3 was analyzed across millions of users within the Mistplay platform from Q2 2023 - Q1 2024.

\*We acknowledge that user segmentation varies greatly between publishers and genres. For the purposes of this report, we defined these groups while accounting for broadly used industry thresholds for general discussion and the need to capture a range of actionable insights for readers. Please reach out to us at [insights@mistplay.com](mailto:insights@mistplay.com) to share feedback on how we can make future releases of this report more valuable.





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