

PLAY PULSE REPORT

AN OUTLOOK ON ADULT DIGITAL PLAY

2026

ABOUT PAPAYA PLAY PULSE REPORT 2026

Marking a significant milestone, the **2026 Papaya Play Pulse Report** is a new annual publication exploring the role of play in adult life. This comprehensive report examines adult play through a broad, interdisciplinary lens, integrating foundational science from the National Institute for Play, original quantitative findings from an independent market research company (*SRI*), and in-depth player interviews.

The report explores how play supports emotional regulation, social connection, mastery, and overall well-being. While much of the data presented here emerges from digital games contexts, the patterns revealed reflect deeper, cross-platform dynamics of human play - dynamics that extend far beyond any single medium or genre.

Taken together, the evidence reinforces a central insight of play science: play is not a trivial pastime, nor merely a distraction. It is a meaningful vital activity - one that supports emotional resilience, psychological safety, identity development, and healthy social engagement throughout adult life. As this first edition of Play Pulse makes clear, play is not something we grow out of; it is something we grow with.





1ST TREND

THE TRANSITION TO BOUNDED SHARED COMPETITION

Adults who are engaging in mobile games are rejecting chaotic undefined, social settings in favor of shared games experiences that are systematically rule-based, fair, and bounded.

The landscape of adult social play is undergoing a shift away from open-ended, disordered environments toward a preference for shared competition that is rule-based, fair, and bounded.

Across the research literature, this shift suggests that play is more likely to emerge in shared experiences that support psychological safety, identity, and belonging, rather than in chaotic or evaluative settings. This evolution



is reflected in a survey conducted by SRI, which found that it is particularly evident in digital games environments.

Data shows that familiarity and framing are dominant, while *“Skill-based play / Fair competition”* is now the primary motivator for 80% of players entering digital competitions, significantly outperforming prize winning or other incentives. A player's testimony echoes this sentiment, stating *“just entering the familiar competition zone creates the whole excitement.”*

By establishing clear boundaries — including rules, specific settings, and distinct timeframes — play environments transform a quiet pastime into a secure social ecosystem where exploration feels safe because the *“unexpected”* is contained within a reliable framework.

“Skill-based play / Fair competition” is now the primary motivator for 80% of players entering digital competitions

SRI market research, 2025





2ND TREND

SOLO PROFICIENCY AS THE SEQUENCE TO SHARED JOY

Private practice toward mastery serves as a preliminary phase, allowing players to build the confidence and emotional inner strength required for public social competition.

Solo play has evolved from a solitary activity into a vital preliminary sequence that builds the confidence and skill required for healthy social engagement. Players typically begin their journey in private to build competence and emotional regulation before opting into more public, competitive environments. Research highlighted by the National Institute for Play shows that people are more motivated to keep playing as they experience focus and momentum, including signals of progress that encourage



continued engagement. SRI market research shows that player motivation over-indexes significantly when they are exposed to daily goals (65%), streaks (62%), and solo mastering (70%).

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Dr. Stuart Brown, Psychiatrist and the Founder of National Institute for Play

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Many players initially prefer solitary contexts such as daily goals, challenges, and solo mastery loops — before social participation. As one of our skill-based game players describes, this process often involves years of private practice: *“I played for 3 years to get a hang of it...often tried to get better scores before joining a competitive challenge.”*

This sequential approach allows players to master a microcosm of skill and scoring privately, ensuring that when they eventually engage with a community, they do so from a position of readiness and a felt sense of joy and competence.





3RD TREND

PLAY PERSONALITIES ARE THE NEW DEMOGRAPHIC NORTH STAR

Innate play styles, rather than age or gender, serve as the most accurate predictors of how and whether adults engage with digital platforms.

Individual behavior and engagement in digital platforms are increasingly driven by innate “*play personalities*” rather than traditional markers like age or gender.

NIFPlay research suggests that adults possess stable play styles, such as the Competitor, Explorer, or Creator — that persist throughout life, meaning that while the “*where*”



of play may shift to digital platforms, the fundamental “*how*” remains consistent. This is evidenced by SRI research showing that 65% of those questioned in the market survey are categorized as “*Young Explorers*” (averaging 34 years old) or “*Mid-Aged Achievers*” (averaging 40 years old); both groups share similar playing motivations despite belonging to different age brackets and gender profiles.

Consequently, digital environments have become meaningful expression spaces for these primal human drivers, supporting core biological and psychological needs that demographics alone cannot predict.

This consistency across age and gender is highlighted by diverse players who use play for the same incentive, specifically for mental clarity; one 25-year-old male player notes that play helps his brain “*feel quiet*”, while a 43-year-old female player describes her routine as a vital way to “*wind down after a busy day at work.*”

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SRI market research, 2025





4TH TREND

THE ELEVATION OF COMPETITIVE PLAY INTO “SERIOUS LEISURE”

Adults are reclaiming play as a sophisticated cognitive exercise, favoring meaningful engagement and skill-building that support improved mood, optimism, and emotional regulation, rather than relying on passive distraction or escapist use.

Competitive mobile play has transitioned into a “*serious leisure*” category, driven by an intentional mindset comparable to the focus dedicated to traditional sports, complex puzzles, or professional hobbies that are centered on achievement and performance.



The SRI survey found that 75% of players prioritize “*meaningful practice*” over passive escapism (35%). Primary segments rank skill improvement and challenges as significantly higher priorities than pure relaxation. This engagement activates the subcortical Seeking System, which drives curiosity, exploration, and the urge for mastery.

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I'm way good at zoning in and being able to concentrate... repetition has helped me succeed and achieve more

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An active Papaya player testimony

One active player interviewed exemplifies this approach, stating, “*I'm way good at zoning in and being able to concentrate...repetition has helped me succeed and achieve more.*” By treating play as an active state of engagement and mastery and not as a perceived tool for avoidance, adults are reclaiming play as a sophisticated cognitive exercise that promotes focus, neuroplasticity, and energized engagement.





5TH TREND

STRUCTURED PLAY AS A FOUNDATION OF EMOTIONAL SAFETY

Emotional regulation in play can emerge from predictable frameworks and fair rules, which allow for a restorative state of “*pure play.*”

Emotional safety and long-term engagement are increasingly rooted not just in rules, but in the reliability of the play system itself. Players demonstrate deeper commitment when frameworks feel understandable, consistent, and internally coherent — conditions that allow attention to shift toward immersion and increase focus. In these environments, play supports emotional regulation at the nervous-system level, enabling players to enter a state



of “*pure play*” characterized by focus, rhythm, and flow rather than monitoring. This reliance on structure is a primary driver of player value; as one player from Papaya community notes: “*Once I figured out that every player gets the same Solitaire cards deck it changed how I play and helped me strategize my game...My tip for myself is to know when to quit and give up on the specific tournament.*”

NIFPlay research supports this, showing that emotional trust in play emerges, for most people, from reliability and structure rather than complete freedom. When the right blend of challenge, reward, and agency is preserved and underpinned by familiarity and safety, play acts as a restorative force that leaves the players refreshed and alive.

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Mia Sundstrom, CEO of National Institute for Play





“For too long, adult play has been dismissed as a simple escape from reality. Our inaugural report reveals a much deeper truth: play is a vital, restorative force that supports emotional resilience, cognitive growth and healthy social engagement.

We are moving away from the era of “empty” content and toward a preference for bounded competition where skill actually matters.

At our core, we believe in creating the space for these “real” moments - where a player’s proficiency turns into a genuine sense of achievement. We don't just facilitate games; we provide a reliable framework for people to show up, and earn a win that feels meaningful.”

By  **PAPAYA**



Report Sources and References

The National Institute for Play (NIFPlay): Scientific frameworks provided by this global thought leader in the neuroscience of play, defining play as a public health necessity. Key Contributors: Stuart Brown MD (*Founder*), Mia Sundstrom MPP (*CEO*), and Lauren Sundstrom (*COO*).

SRI Market Research: A 12 month study of US digital players, conducted in July '25, November '25, and January '26 with a representative sample of n=15,000 adult respondents.

Direct Player Testimonies (Questionnaires & Interviews): A qualitative data set comprising direct testimonies and detailed responses from ~70 active players, used to establish personal routines, motivations, and histories with play.

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