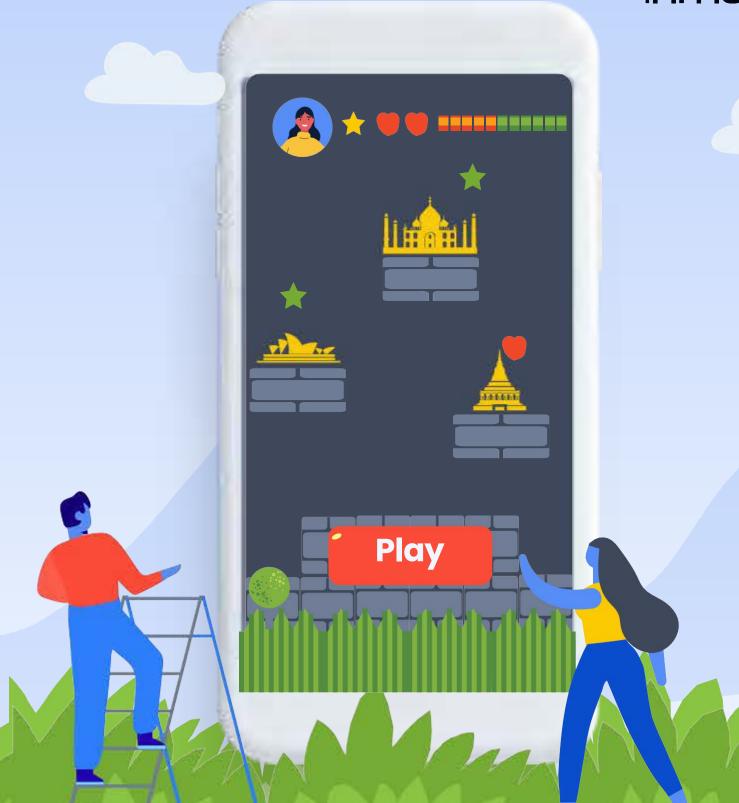
Audience Insights Mobile Gaming

Asia Pacific

The following report is based on a detailed analysis of data from the InMobi Advertising and Audiences Platform. The analysis explores the mobile advertising opportunity in the mobile gaming space in APAC. The analysis explores data from Jan 2020 to April 2020 and highlights the user behaviour of gaming personas, advertiser spends and the performance of different ad formats in the gaming category.



CONTENT

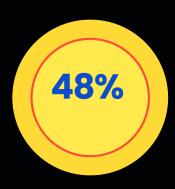




What was once considered to be a niche interest pursued only by a select few who have access to specialized hardware, gaming now claims 4.7 billion devices across the world. Like most entertainment categories, gaming has also witnessed a great democratization driven by smartphones. In fact Mobile Gaming will account for over 48% of overall revenues in beating both console and PC gaming. With over 2.6 billion mobile gamers across the world, we deep dive into 3 key regions: Australia, Indonesia, and India to understand their behavior. We also share insights on the top verticals that are embracing the potential of gaming and what strategies can marketers leverage to make the most of this opportunity.



gaming devices across the world



revenues from mobile



mobile gamers globally

Source: Statista, NewZoo, MoneyControl

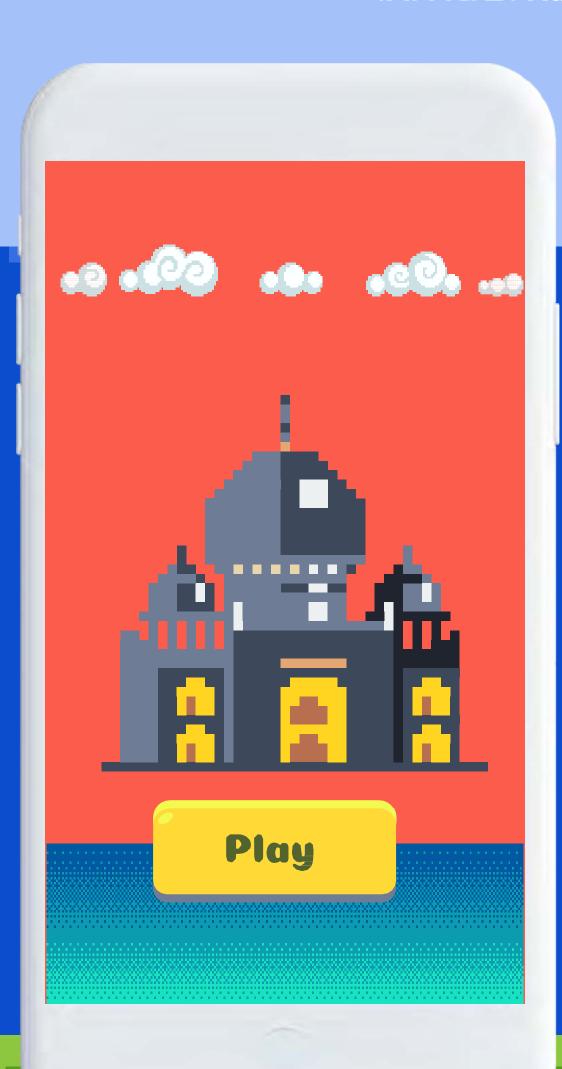




'GAME ON' INDIA

India is home to 1 out 10 of the world's gamers and is poised to become one of the top mobile gaming markets in APAC. With mobile proving to be a low barrier to entry for most, 89% of India's gamers are on mobile with a 20.3% growth year on year. The typical profile of a gamer has shifted over the years in India. Today's gamers come from diverse backgrounds and have a variety of interests.

Source: Statista, NewZoo, MoneyControl

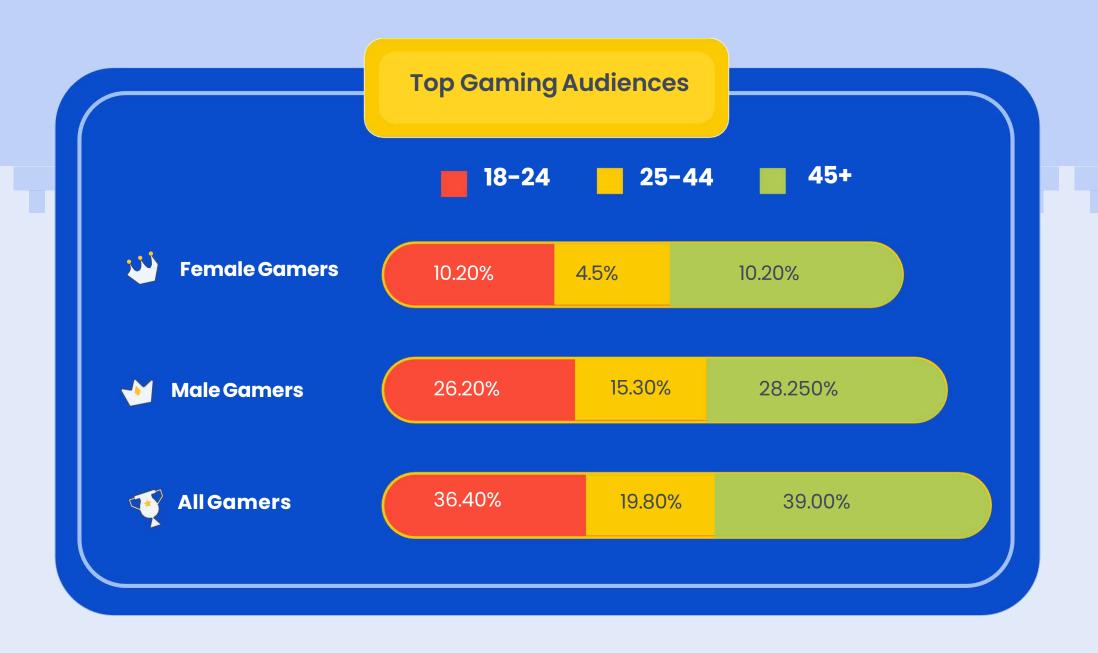




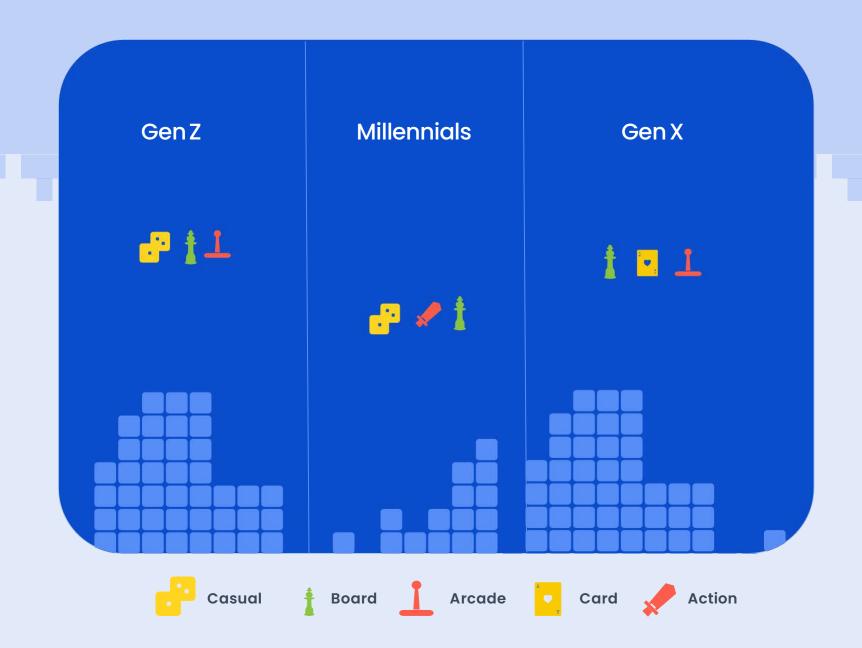


Not just a young person's game

Gaming is not only popular among the Gen Z, but is equally popular among those in the age group of 45 to 54

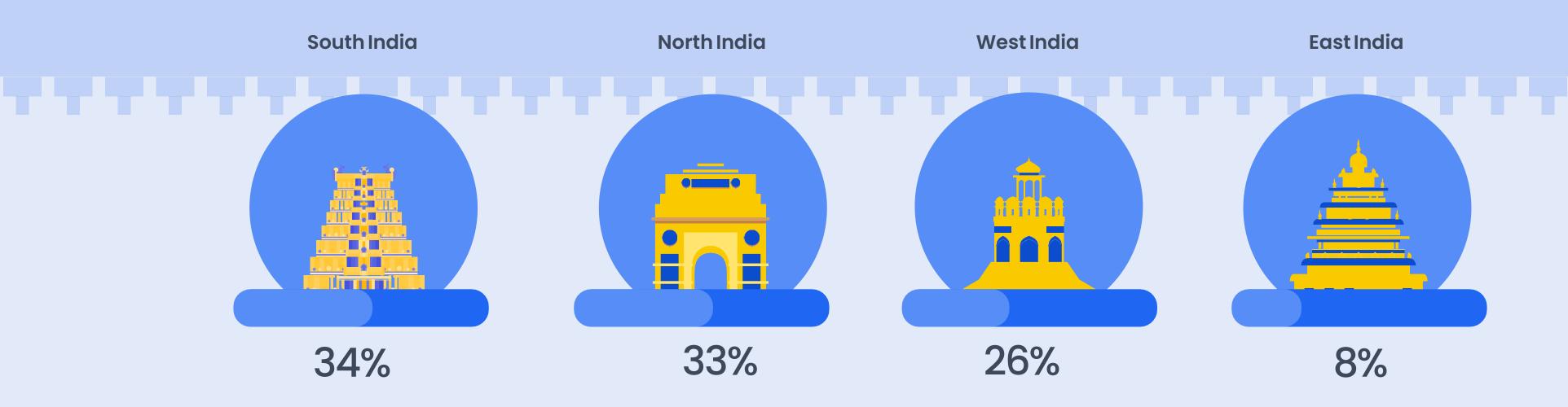


Different generations are logging on to play mobile games, and their favorites include:



Locating India's Gamers

The popularity of mobile gaming in India is varied across regions. This is reflective of several factors such as internet connectivity, digital maturity, and behavioral attributes across these regions.

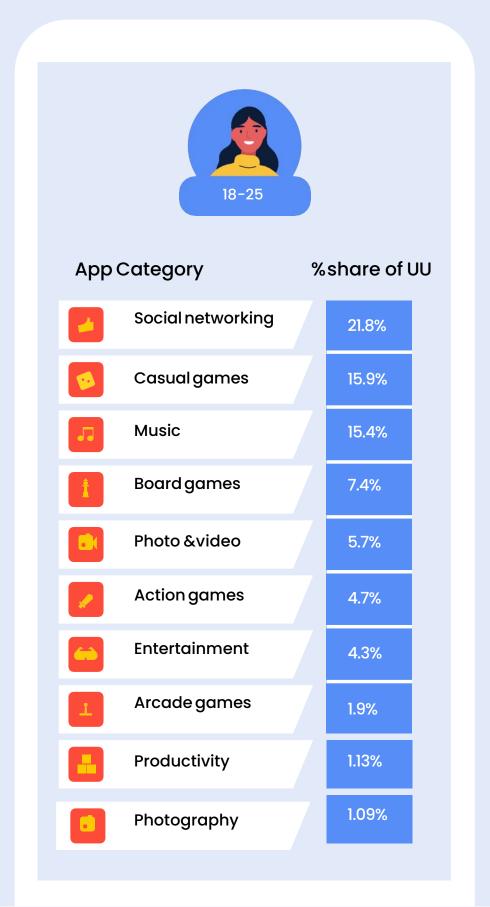




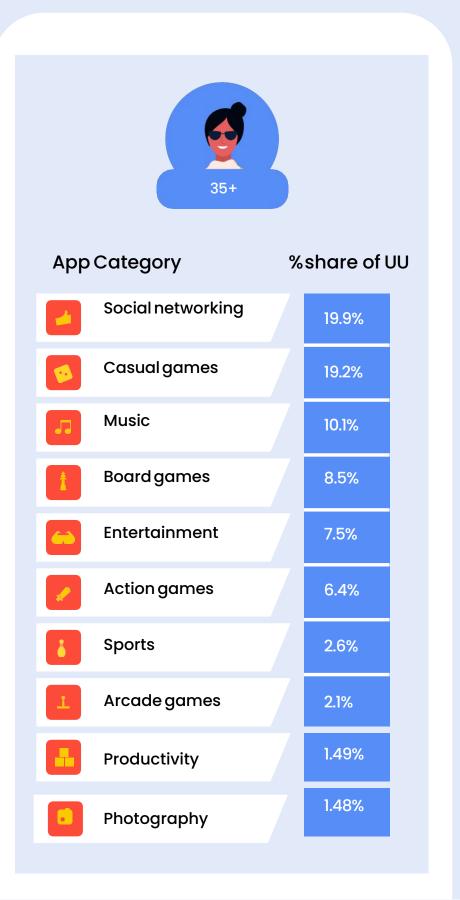


The Indian Woman Mobile Gamer

The Apps that Women Gamers Use

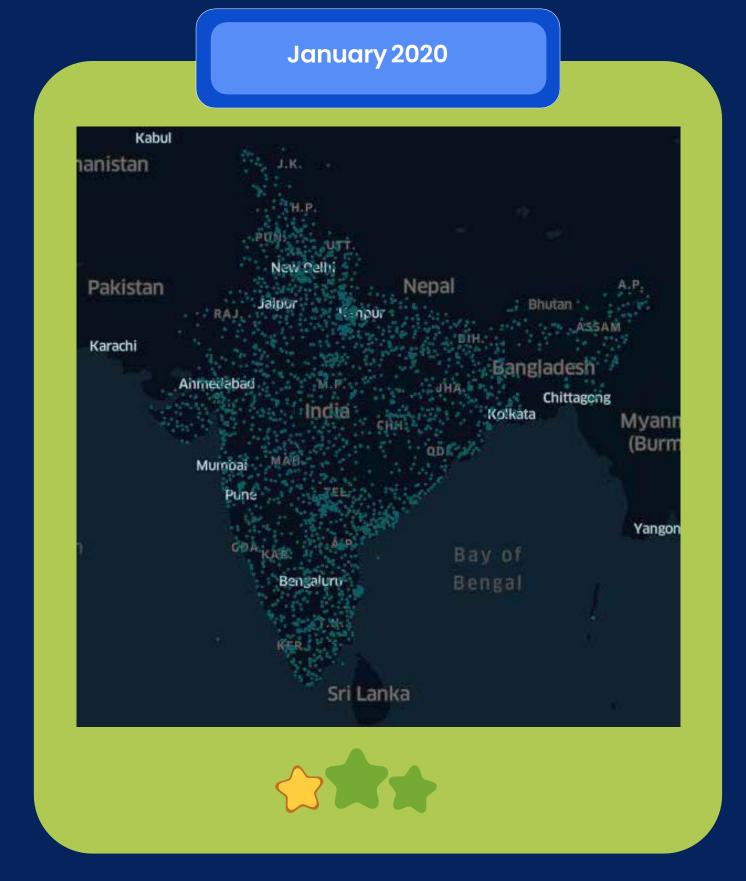


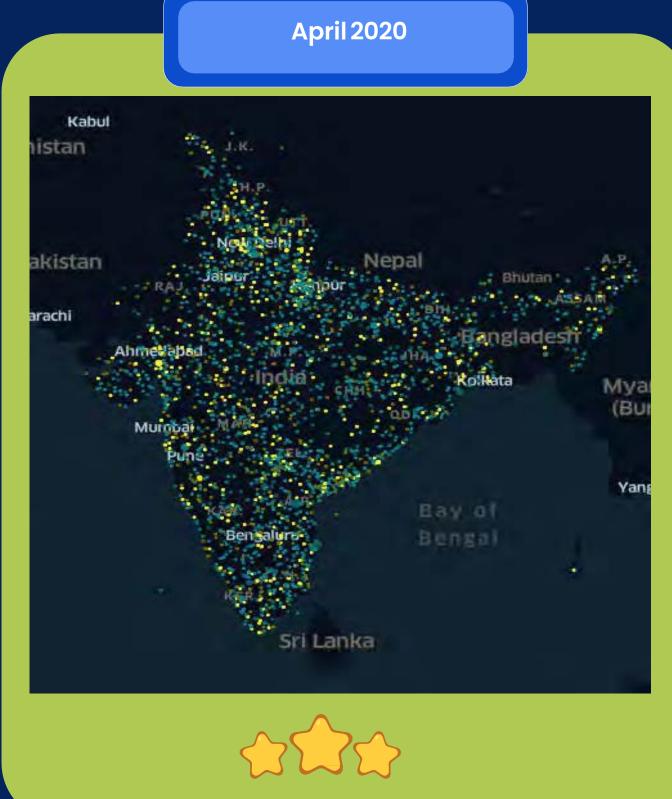






Mobile Gamers in a pre- and post-COVIDworld





- Gaming app usage surge across metros, tier-1, 2 and 3 cities in India
- Minimum 80% growth seen across India during April and May 2020





Rising through the ranks

As people begin to spend more time indoors in 2020, many are turning to their phones as a source of entertainment leading to a significant growth in app usage and unique users



The many lives of An In-app Indian Gamer

Gamers have a wide variety of interests both online and offline. Be it social networking apps or visiting retail store visitors, it is likely that the audiences you are after are gamers too!







The Next Move: Winning Categories

Non-Strategy led games such as Word and Arcade games have witnessed increasing popularity while commanding a larger share of spends. This phenomenon can be attributed to their high accessibility and the ability of an average user to be able to plug and play these games

Top Ranking Games by Spends Q1, 2020

Growth in Spends on Gaming Apps - Jan 2020 - Mar 2020



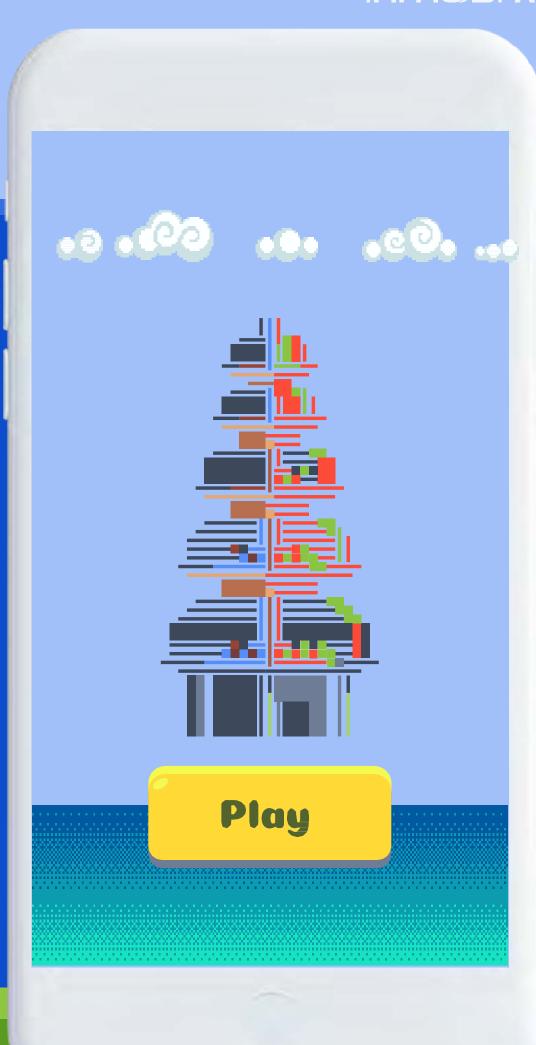




POWER UP: INDONESIA

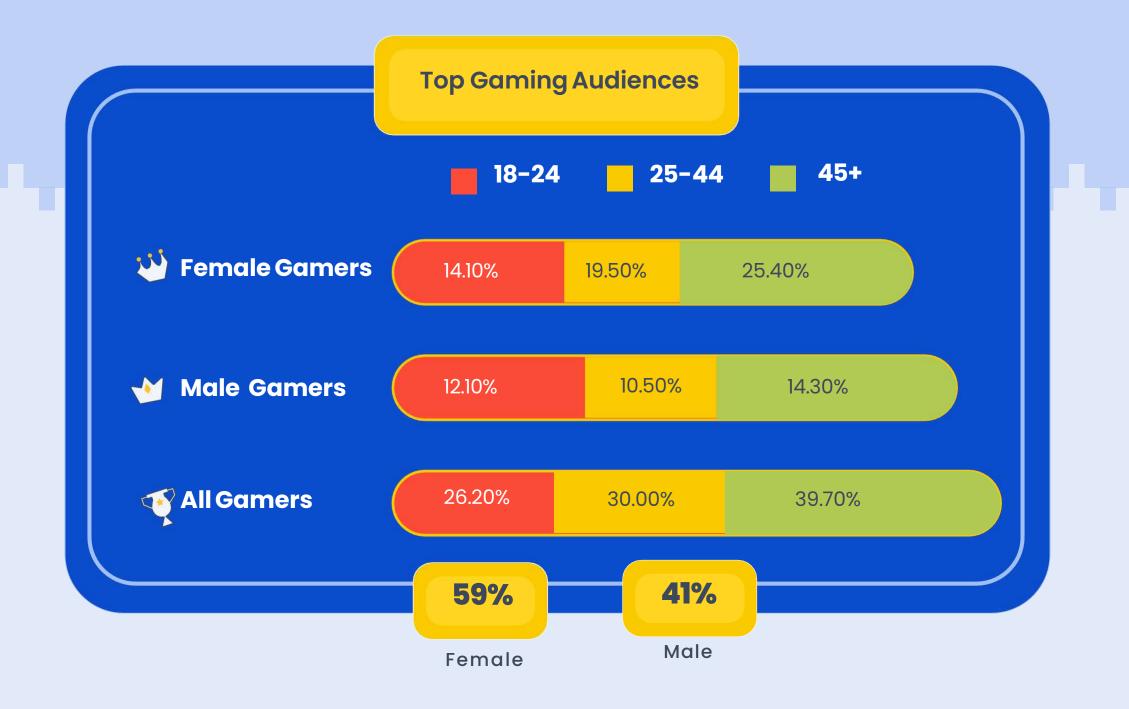
Southeast Asia has become one of the most viable gaming markets around the globe. With thedominance of premium publishers, such as the SEA group (formerly known as Garena), mobile is poised to account for 69.4% of all gaming revenue in the region. Indonesia has become a bright spot in region, with the government hosting e-sport competitions.

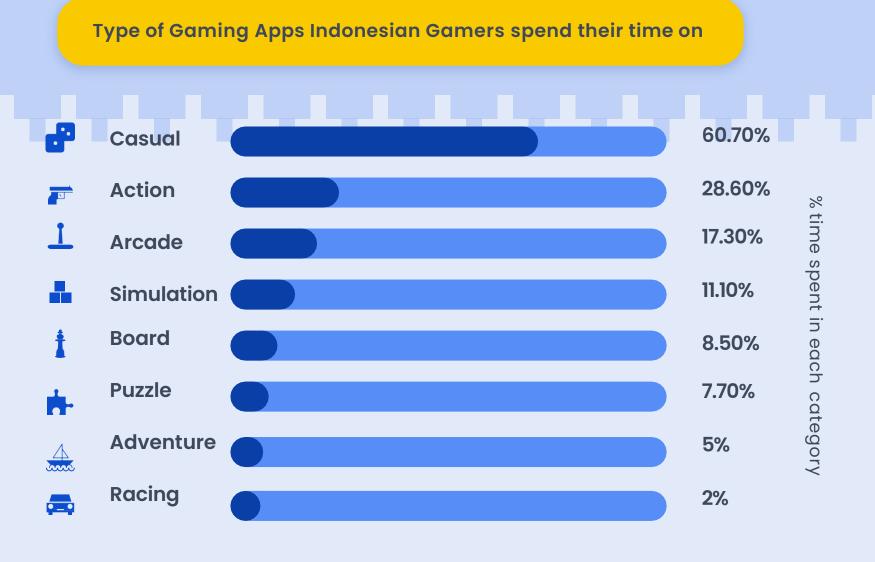
Source: NewZoo



Understanding the Indonesian Gamer

A male dominated hobby in the past, today's Indonesian Gamers are predominantly female. In fact the 3 largest gaming audiences are women led, across different age groups. Southeast Asians enjoy a wide variety of games including casual and simulation games.



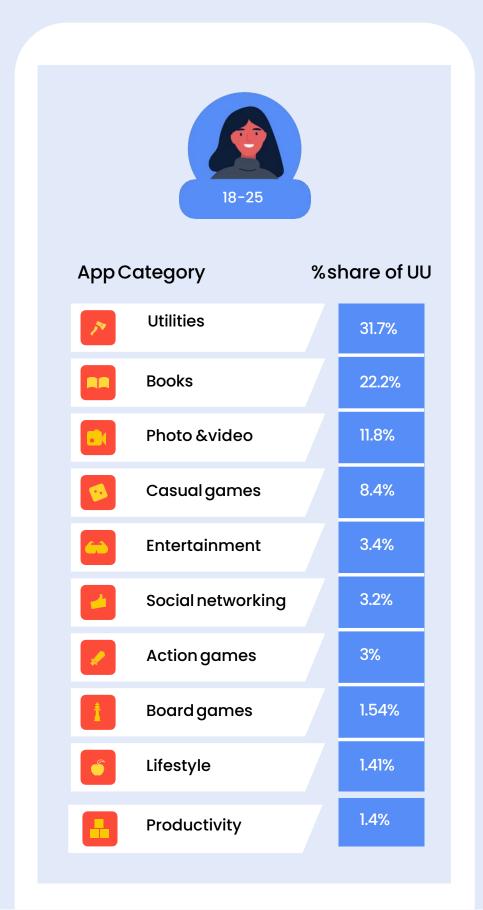




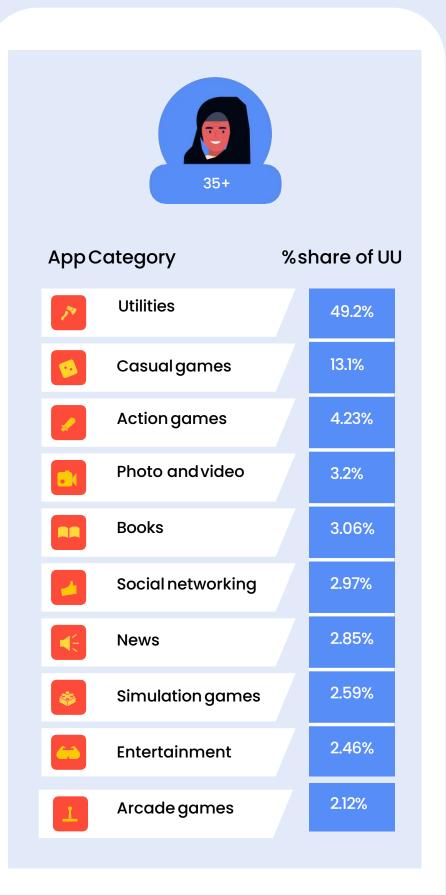


The Indonesian Woman Mobile Gamer

The Apps that Women Gamers Use



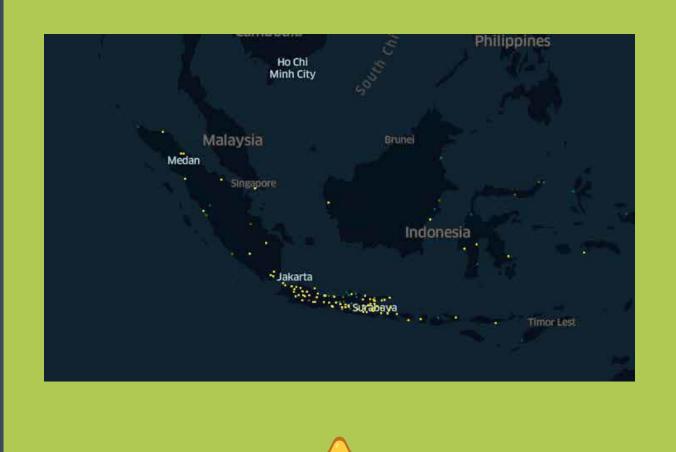




Mobile Gamers in a pre- and post-COVIDworld

January 2020

April 2020



- Gaming app usage surge across cities on the main island and outside of it..
- Minimum 75% growthseen across Indonesia during April and May 2020

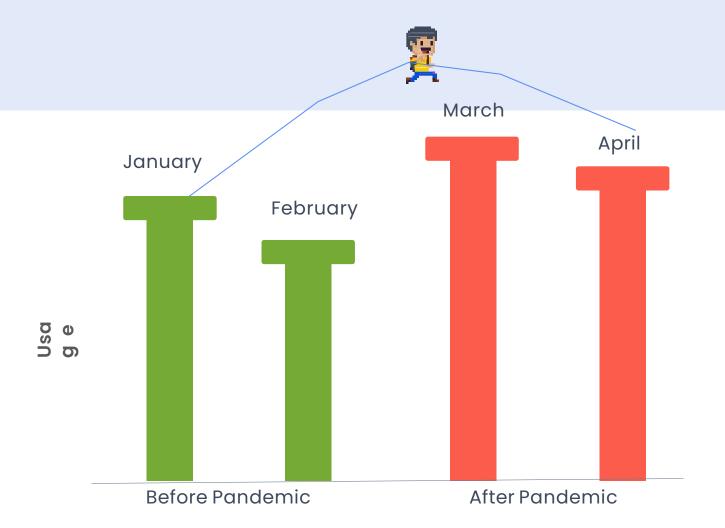






As people begin to spend more time indoors in 2020, many are turning to their phones as a source of entertainment leading to a significant growth in app usage and unique users

Gaming Audience engagement through the months



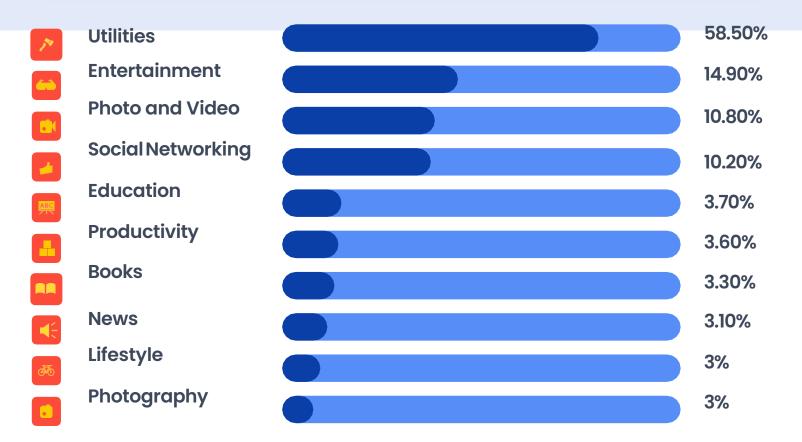
Growth in Gaming App Usuage



The many lives of An In-app Indonesian Gamer

We identified where you can find Southeast Asian gamers both offline and online. Outside of games they spend their time on utility and entertainment apps and visit retail stores and restaurants in theoffline world

Type of Non-gaming apps, Indonesian gamers spend their time on



Percentage time spent in each category

Online and offline characteristics of the Indonesian Gamer







The Next Move: Winning Categories

Non-Strategy led games such as Word and Arcade games have witnessed increasing popularity while commanding a larger share of spends. This phenomenon can be attributed to their high accessibility and the ability of an average user to be able to plug and play these games

Top Ranking Games by Spends Q1, 2020

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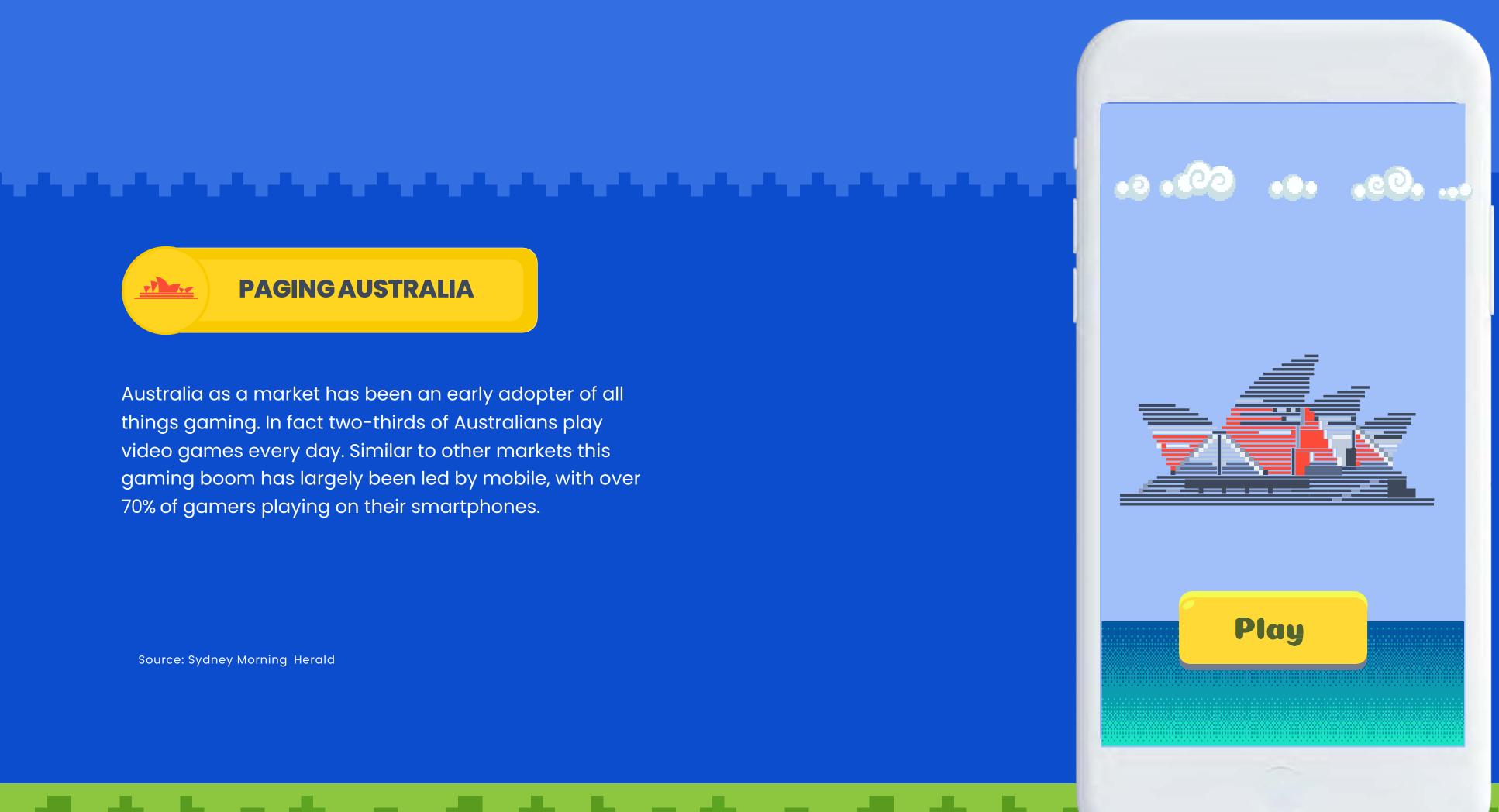




PAGING AUSTRALIA

Australia as a market has been an early adopter of all things gaming. In fact two-thirds of Australians play video games every day. Similar to other markets this gaming boom has largely been led by mobile, with over 70% of gamers playing on their smartphones.

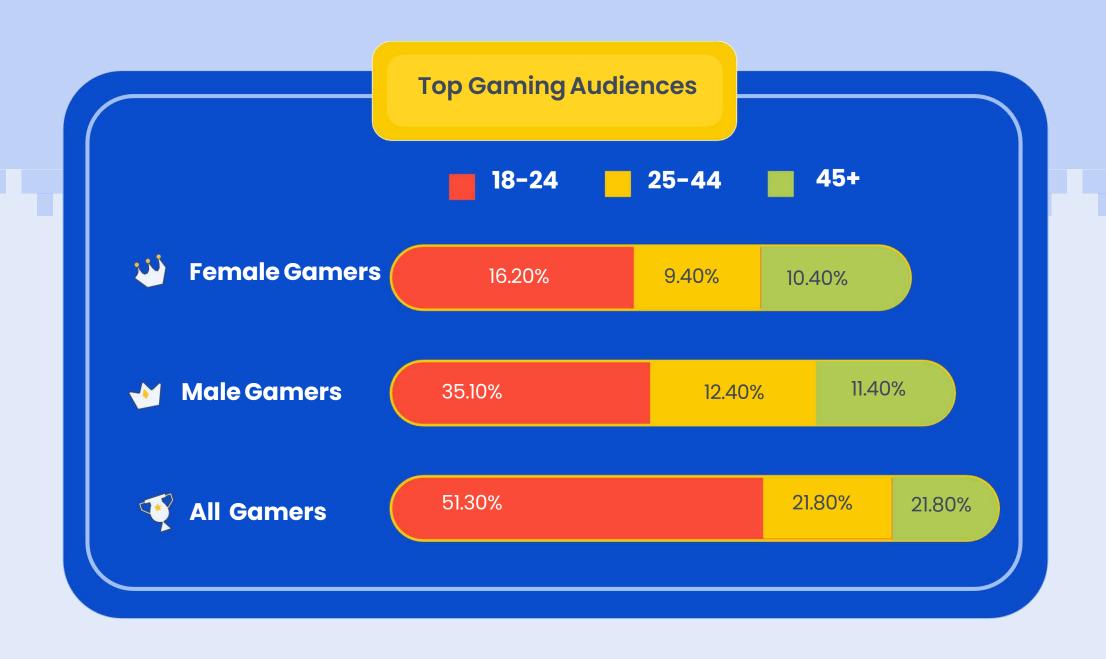
Source: Sydney Morning Herald

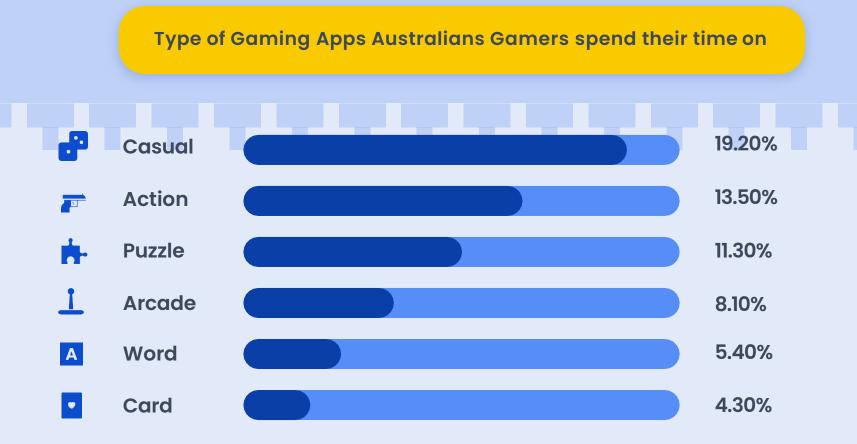




Decoding the Australian Gamer

Played by both men and women, mobile gaming is a well enjoyed hobby in Australia. Finding an audience across generations, time spent on app categories have increased across the board



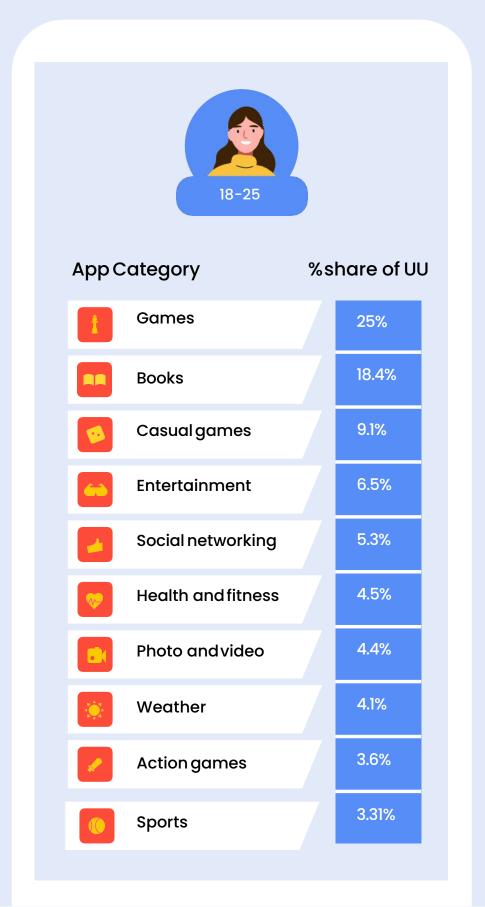




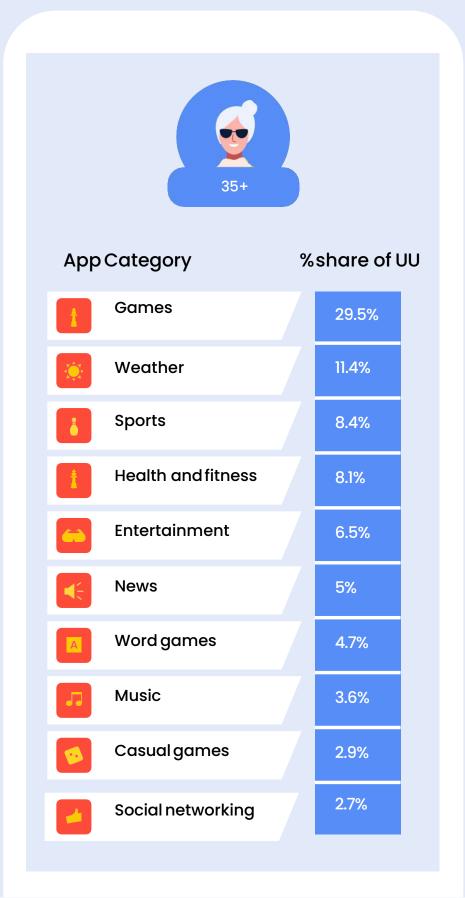


The Australian Woman Mobile Gamer

The Apps that Women Gamers Use







Mobile Gamers in a pre- and post-COVIDworld



Surabaya

Timor Lest

Solomon Islands

Var

Coral Sea

New Caledons

Caledons

S.A.

Perth

S.A.

Perth

N.S.W.

Sydney

Tasman

Sea

TAS.

April 2020

- Gaming app usage surge across cities of varying population in Australia.
- Minimum 100% growth seen across Australia during April and May 2020

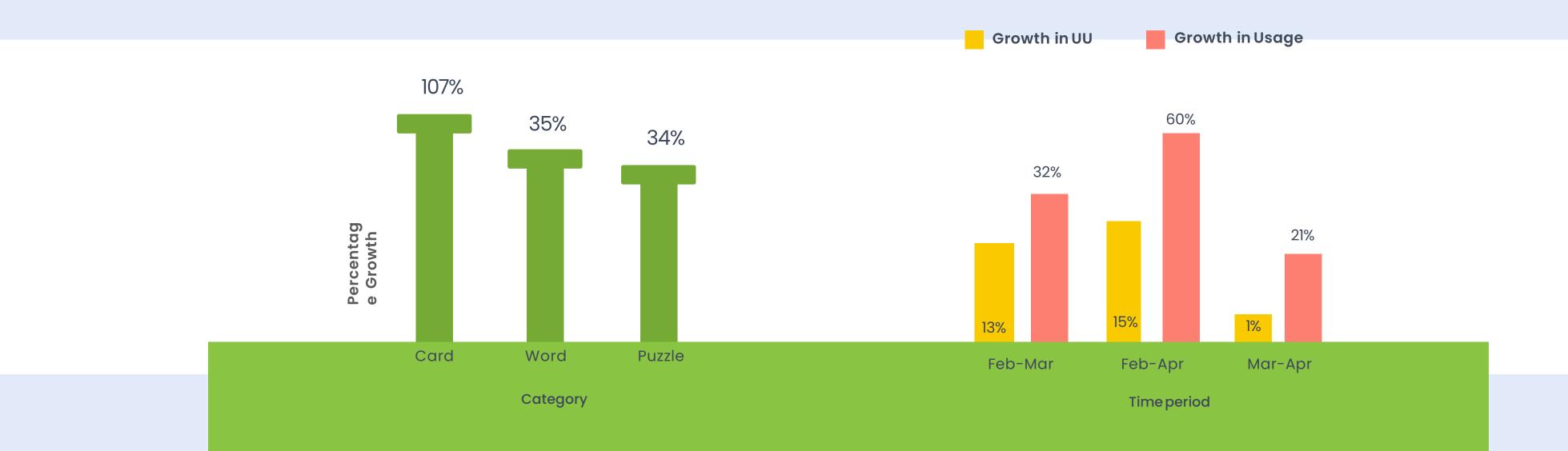






Unlike other countries in the APAC region, Australia was amongst one of the earliest countries to seemingly overcome the first wave of COVID-19. Despite this, there was a steady growth in the number of unique users especially between the months of Feb and April indicating habit forming changes as a result of shifting consumer behavior

Growth in Gaming AppUsage







Locking Coordinates

Australian Gamers are not a monolithic group and have a wide variety of interests both offline and online. You can spot them using other apps such as entertainment and weathers apps and strolling through retail and toy stores in real life

Online and offline characteristics of the Australian Gamer

Type of Non-gaming apps, Australian gamers spend their time on 7.10% **Entertainment** 6.90% Weather 4.90% Health and Fitness 4.40% Sports Photo and Video 3.40% Socialnetworking 3% **Books** 2% 1.80% Music

Percentage time spent in each category







The Next Move: Winning Categories

Non-Strategy led games such as Word and Arcade games have witnessed increasing popularity while commanding a larger share of spends. This phenomenon can be attributed to their high accessibility and the ability of an average user to be able to plug and play these games

Top Ranking Games by Spends Q1, 2020











3.Casual

4.Simulation







5. Arcade

6.Card

7.Board

Growth in Spends on Gaming Apps - Jan 2020 - Mar 2020





The Brand Safety Promise



1 Casual Mobile Gaming Apps Have No Inappropriate
Content

Non-Strategy led games such as Word and Arcade games have witnessed increasing popularity while commanding a larger share of spends. This phenomenon can be attributed to their high accessibility and the ability of an average user to be able to plug and play these games.



2 Allows For Better And Surer Scale Than Via Blacklists
And Whitelists

Brands and agencies rely heavily or exclusively on blacklists and whitelists which can be a manual and rudimentary exercise.





3 Meets Industry Benchmarks And Safeguards For Brand Safe Content

An in-app environment has gating mechanism which helps remove all such objectionable space from being exposed to the brands.



4 Device-Native Ad Formats Add Additional Layer Of Brand Safety

For further protection, brands should seek ad formats that inherently provide an additional layer of security by virtue of their share of the screen.







Marketing Cloud

InMobi drives real connections between brands and consumers by leveraging its technology platforms and exclusive access to mobile intelligence. Its Marketing Cloud creates new paths for brands to understand, identify, engage and acquire connected consumers.

Powered by

- Mobile Intelligence
- Transparent
- Always On
- Integrated





Interested in learning more? Write to use atmobilemarketing@inmobi.com



