



**EVERYONE'S**

**GAMING**

**AMONG US**

Mobile Gaming through the Pandemic and Beyond



# About the Report

The following report is based on a detailed analysis that explores the mobile advertising opportunity in the mobile gaming space in Southeast Asia. It includes data from the InMobi Marketing Cloud and Audience Intelligence Platform between Jan 2020 to Jan 2021 (over 1.7 trillion auctions) and highlights gaming personas, advertiser insights and the performance of different ad experiences in the gaming category. The analysis is also based on survey conducted in Indonesia between 9th Feb – 16th Feb 2021 on the InMobi Pulse Platform along with data from the InMobi Advertising and Audiences Platform.

## CONSUMER RESEARCH

InMOBI  
**Pulse**

## AUDIENCE INSIGHTS

InMOBI  
**Audience Intelligence**

## ADVERTISING INSIGHTS

InMOBI  
**Marketing Cloud**

# Research methodology



A mobile survey conducted  
using InMobi Pulse



A sample of n=1000+  
Indonesian smartphone users



Respondents recruited  
programmatically via the  
InMobi mobile advertising  
platform in February 2021



Results targeted and  
weighted to  
be representative of  
Indonesia's smartphone  
population



**01**

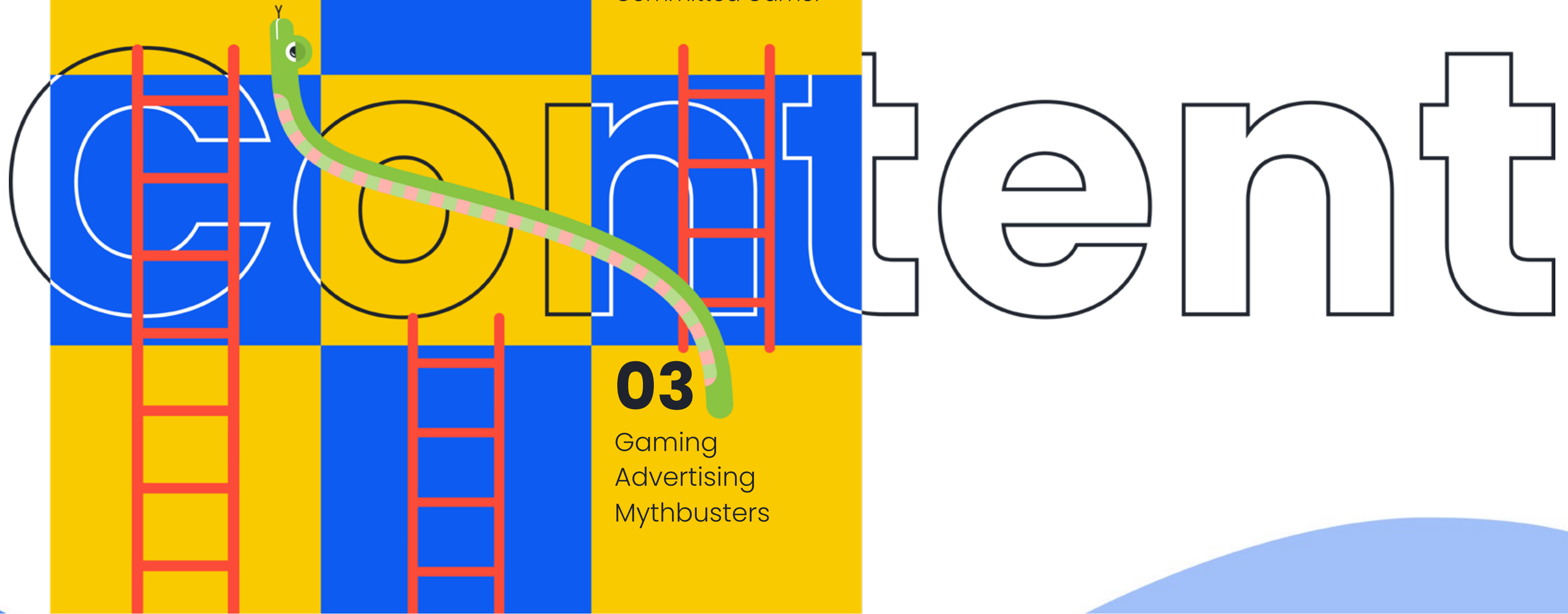
Setting the Stage,  
Southeast Asia

**02**

'Game On'  
Indonesia:  
The Land of the  
Committed Gamer

**03**

Gaming  
Advertising  
Mythbusters





01

# Setting the Stage, Southeast Asia

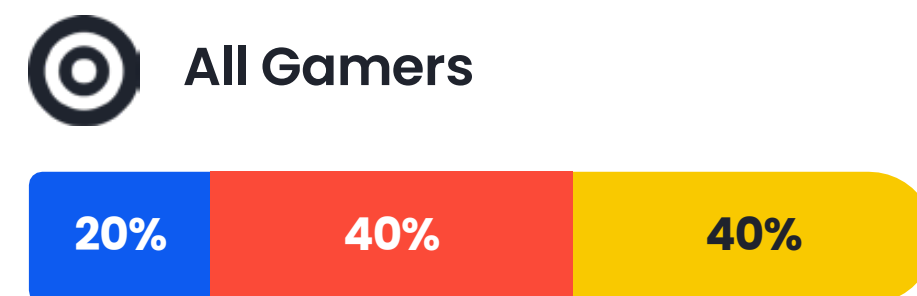
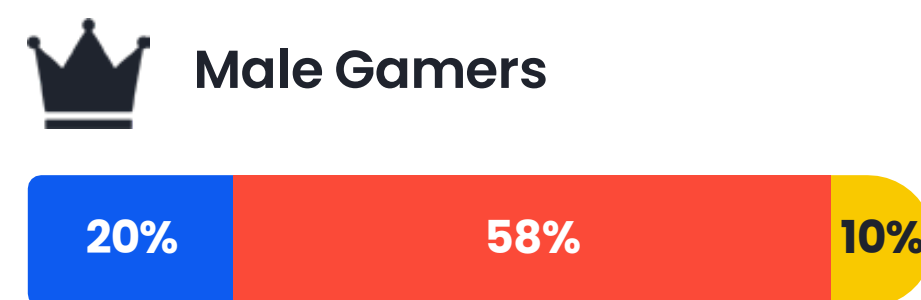
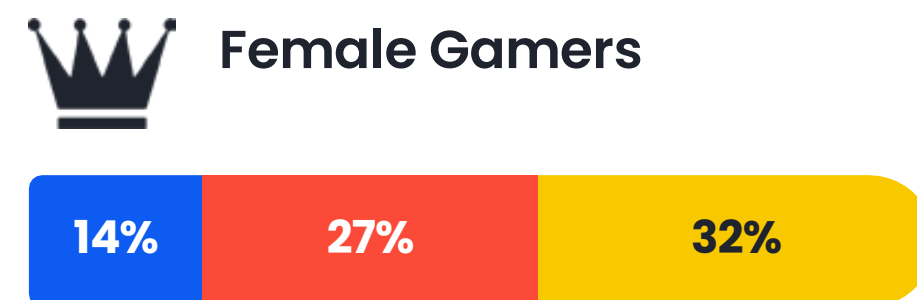
Home to over 250 million mobile gamers, Southeast Asia is a force to reckon with in the global gaming landscape. The mobile-first region has taken to gaming with great gusto, with an understandable preference for smartphone gaming over PC and Console.



# Not just a young urban man's game

It is critical to ditch the notion that gaming is only popular among young men. It is equally popular among women and those in older age groups as well

## Top Gaming Audiences



Gender Split of Mobile Gamers in Indonesia\*



# Different generations across Southeast Asia log on to play their favorite games



Gen Z

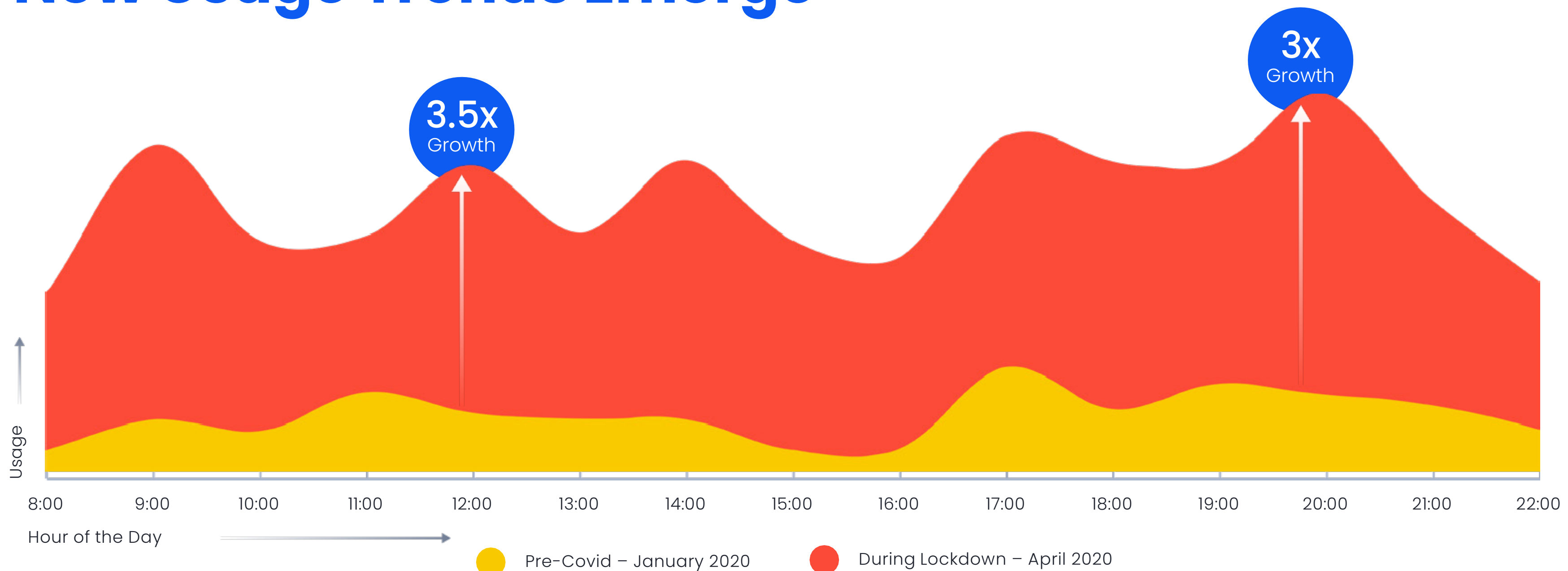


Millennials



Gen X

# Southeast Asia Logs On: New Usage Trends Emerge

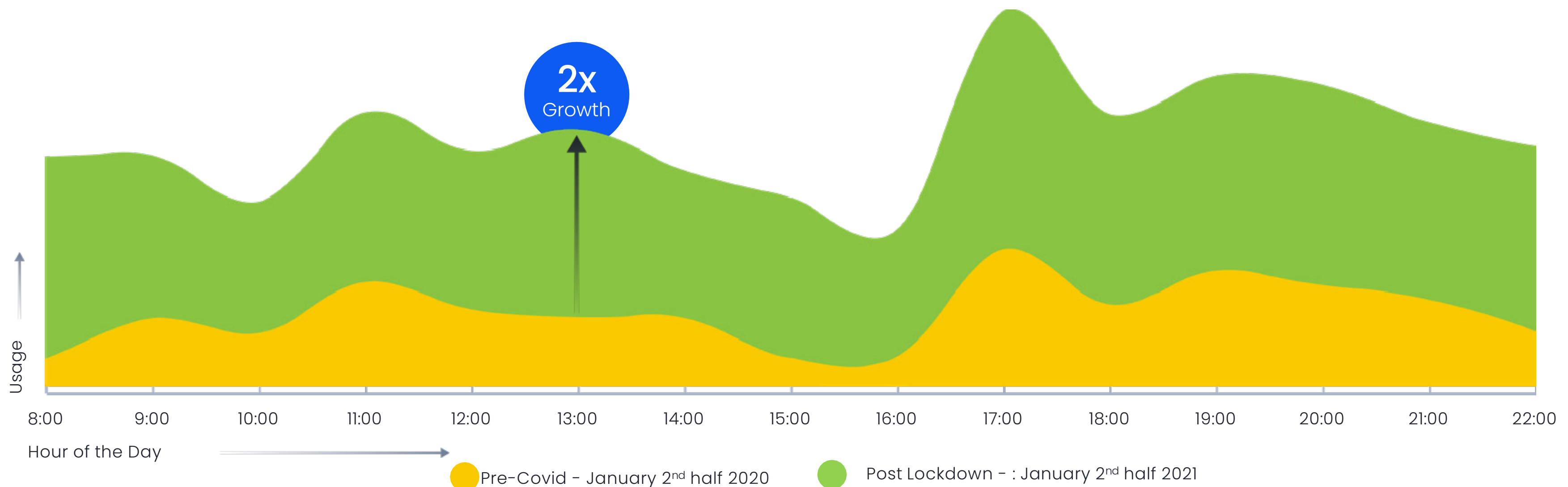


Smartphone users across Southeast Asia took to gaming with great gusto during the initial lockdowns with 3.5X higher engagement during the day. Mobile gaming witnessed several peak times in a day during the initial phases of the lockdown.

Source: InMobi Audience Intelligence Platform, January 2020 to January 2021



# Southeast Asia Games On: New Trend, Lasting Impact



What emerged first as trend, transformed into permanent behavior. Southeast Asia witnessed a permanent shift in behavior which lasted beyond the pandemic, recording over a 2X growth in gaming usage year on year on average and a 2.5X growth in the evening around 5pm.

02

# 'Game On' Indonesia: The Land of the Committed Gamer

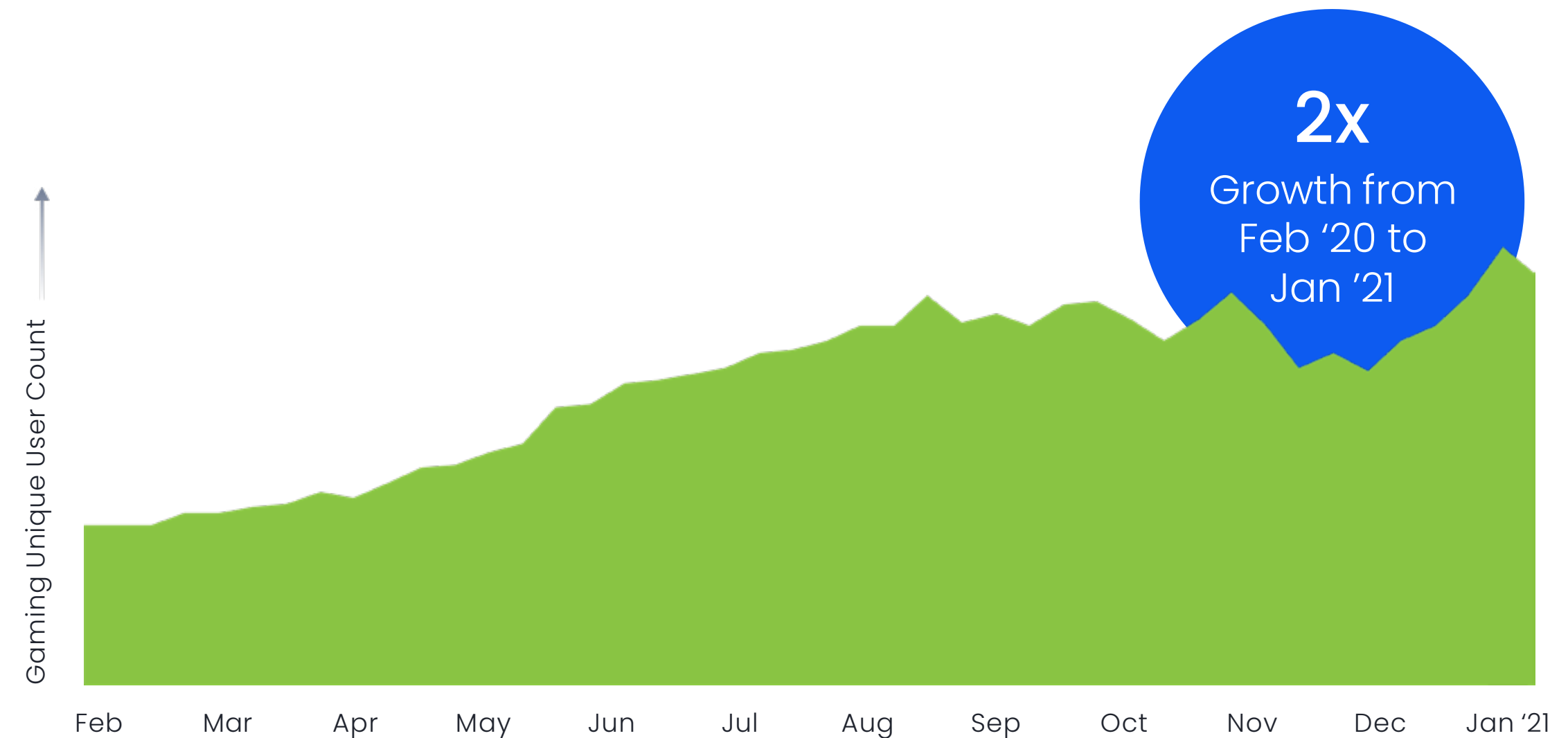
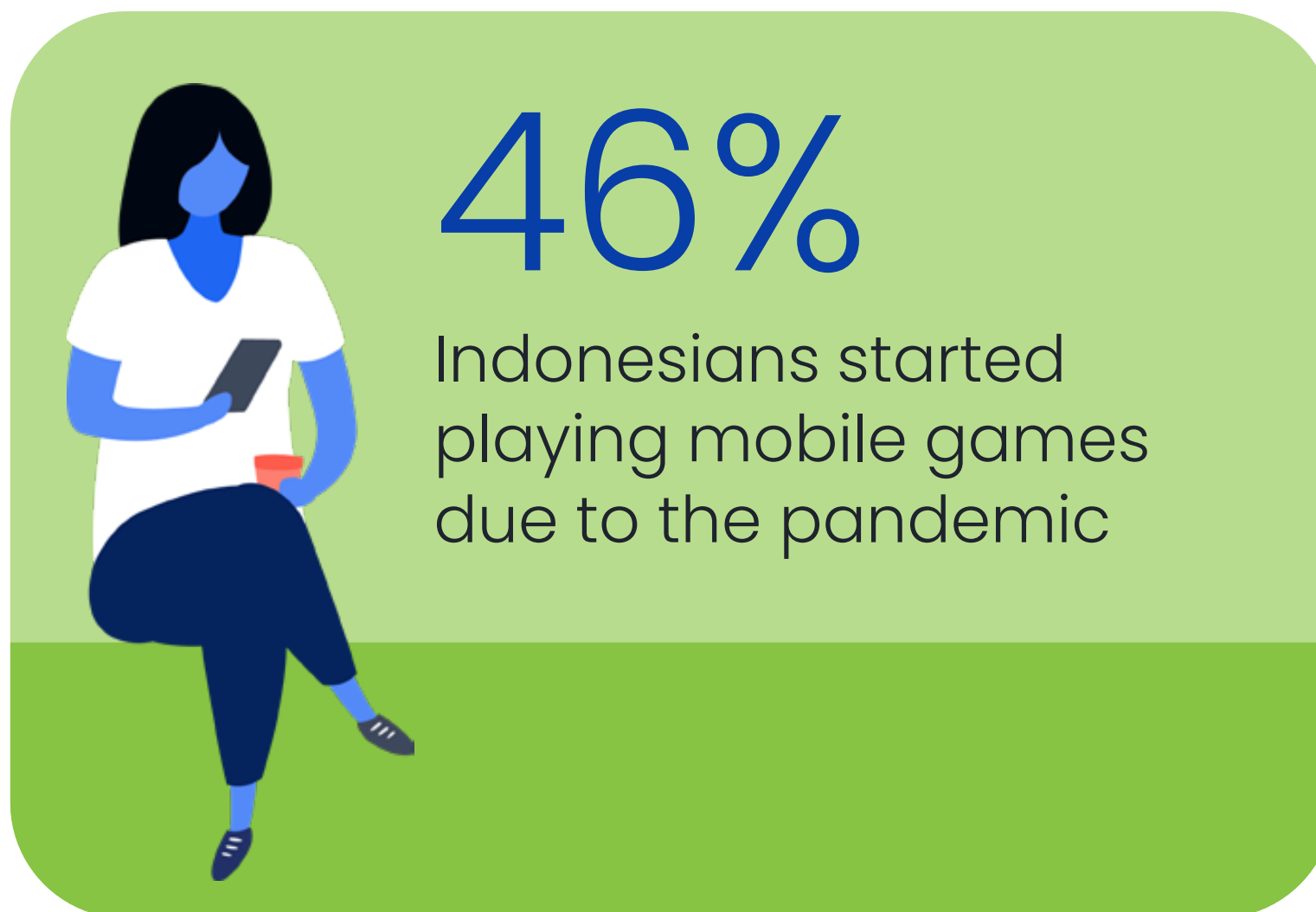
With over 2.7 billion players across the world, can we place each gamer in the same category? Absolutely not, the types of gamers are about as varied as the types of games themselves. In our research we found 3 overarching themes. There are the committed gamers, the regular gamers and the occasional gamers. In this section, we dig deep into their behavior and motivations of gamers in Indonesia.





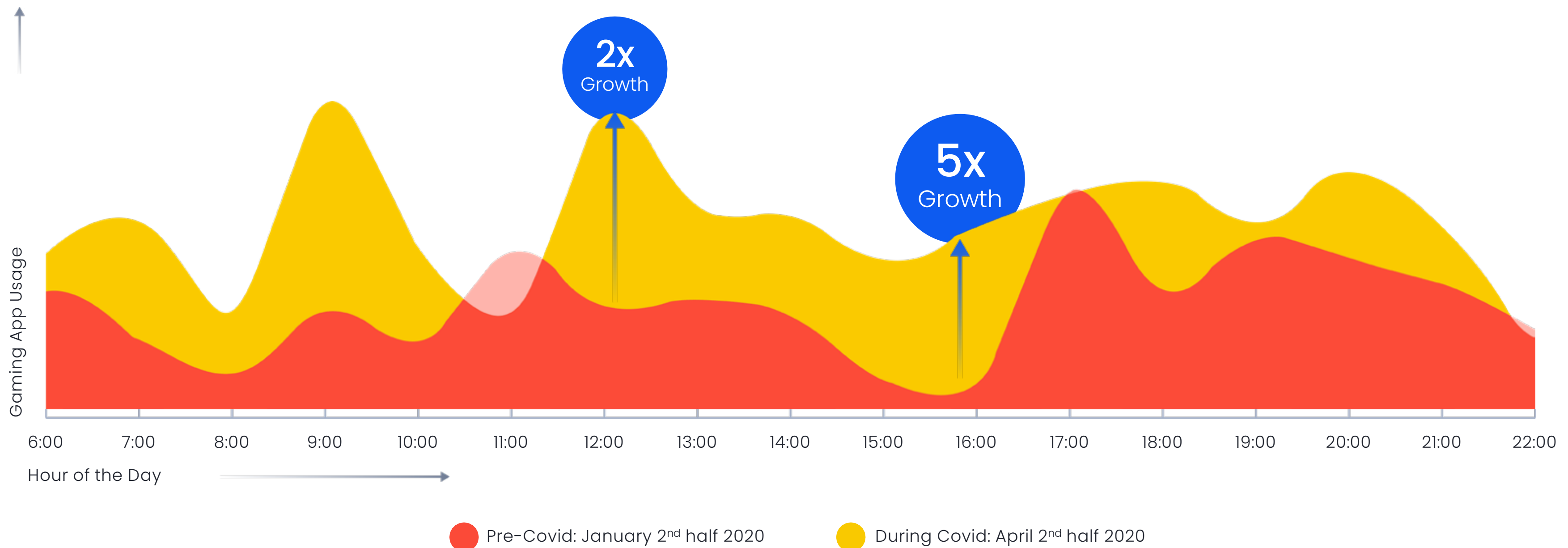
# Emerging Trend: Accelerated Democratization

The Pandemic has brought on board an expansive cohort of mobile gamers



# Emerging Trend: Indonesians Log On

Game App usage pre lockdown and during lockdown

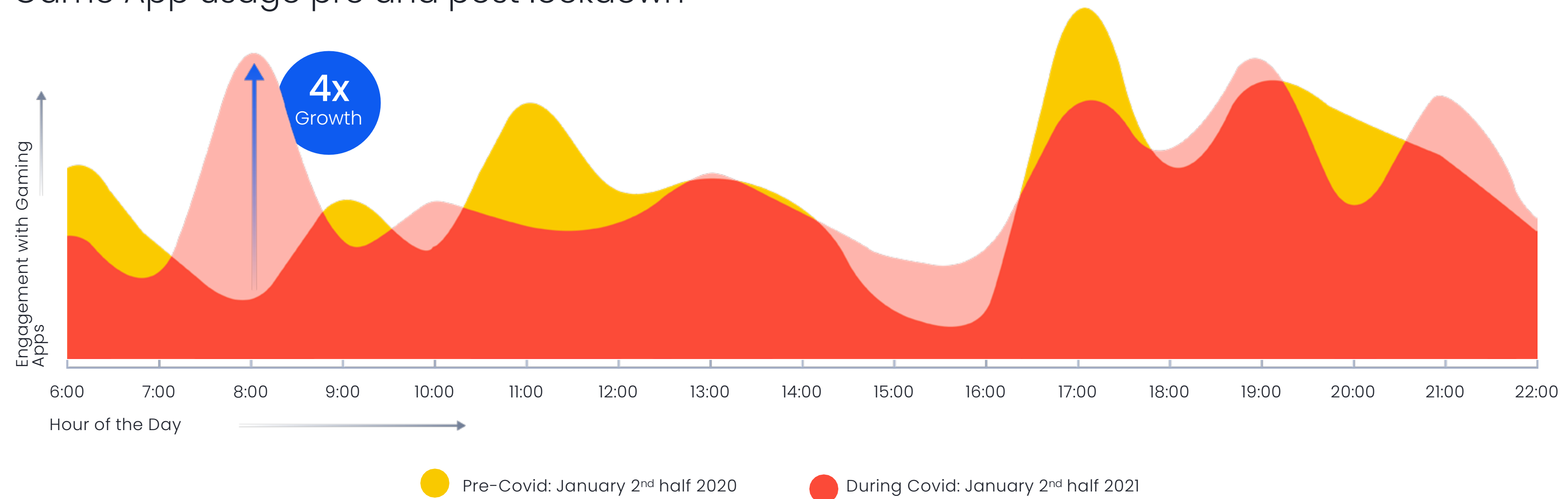


Pre-lockdown, Indonesians would increase their game play post noon till dinner time. However, during lockdown, game play begins a lot earlier around 6am, witnesses a brief lull between 1:00 pm – 5 pm, and then picks up again in the evening hours beginning 6:00 pm till 10:00 pm.



# Lasting Impact: Gaming Finds a Permanent Spot

Game App usage pre and post lockdown

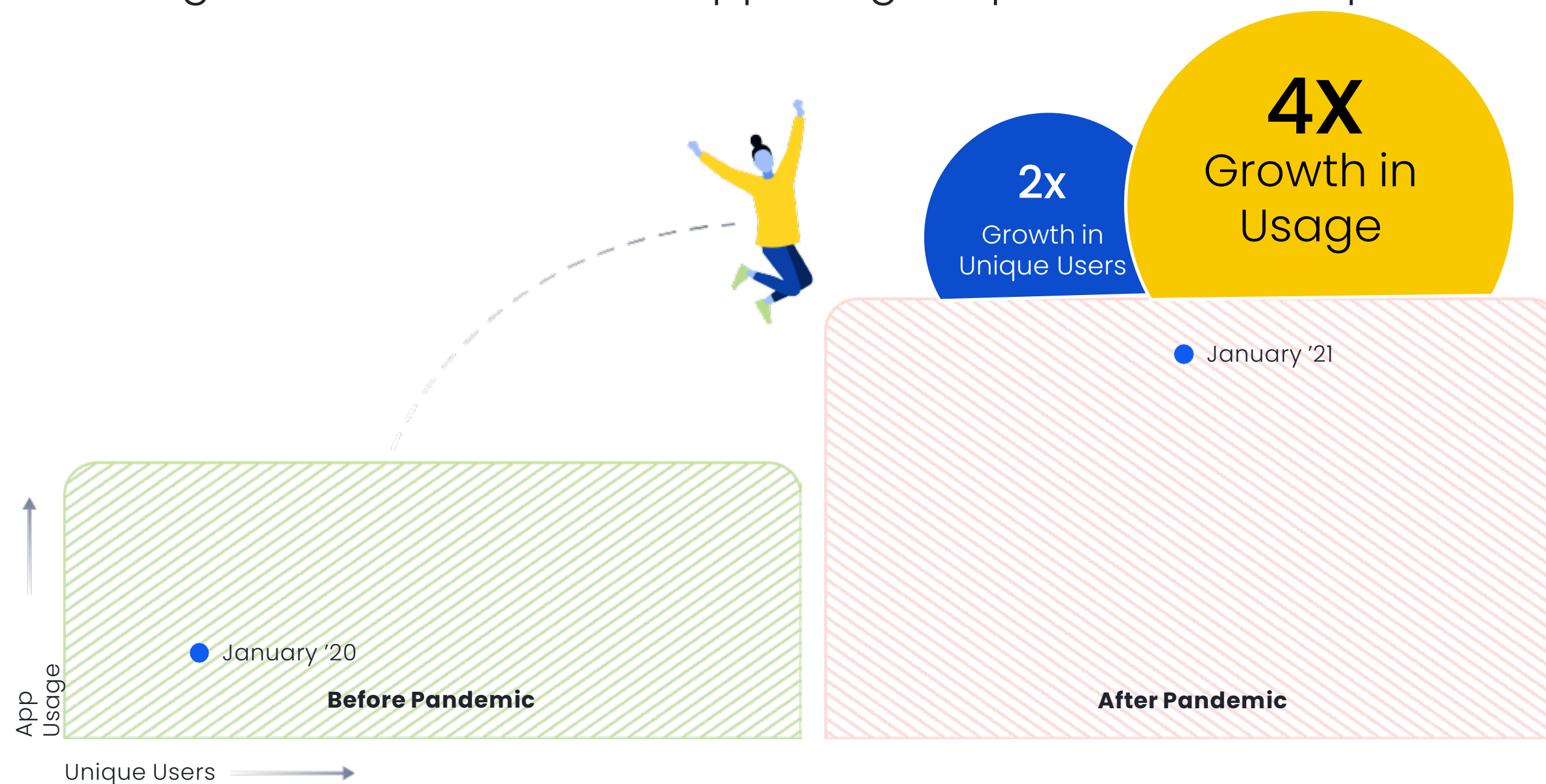


Indonesians have retained their habit of playing more mobile games which started during the pandemic, even much later into Jan-Feb 2021. Pre-lockdown, Indonesians would increase their game play between 12:00 pm – 7:00 pm. However, during and post lockdown, game play declines in the afternoons and then picks up again post 4:00 pm. Clearly, folks are taking the time during the day to spend time with family over meals and reserving game play for a-round-the-day snack.

# Rising Through the Ranks

Mobile Gaming has seen a surge in players and usage since the onset of COVID-19 where more people are spending time indoors due to the lockdown

Gaming Audience Users and App Usage in pre-COVID and post-COVID Times





# Committed Gamer Emerge Victorious

## Type of Gamers in Indonesia



### Committed Gamers

Play once to several times a day

### Regular Gamers

Play at least once a week

### Occasional Gamers

Play once a month or less

## Type of Indonesian Gamers by Gender



### Female Gamers



### Male Gamers

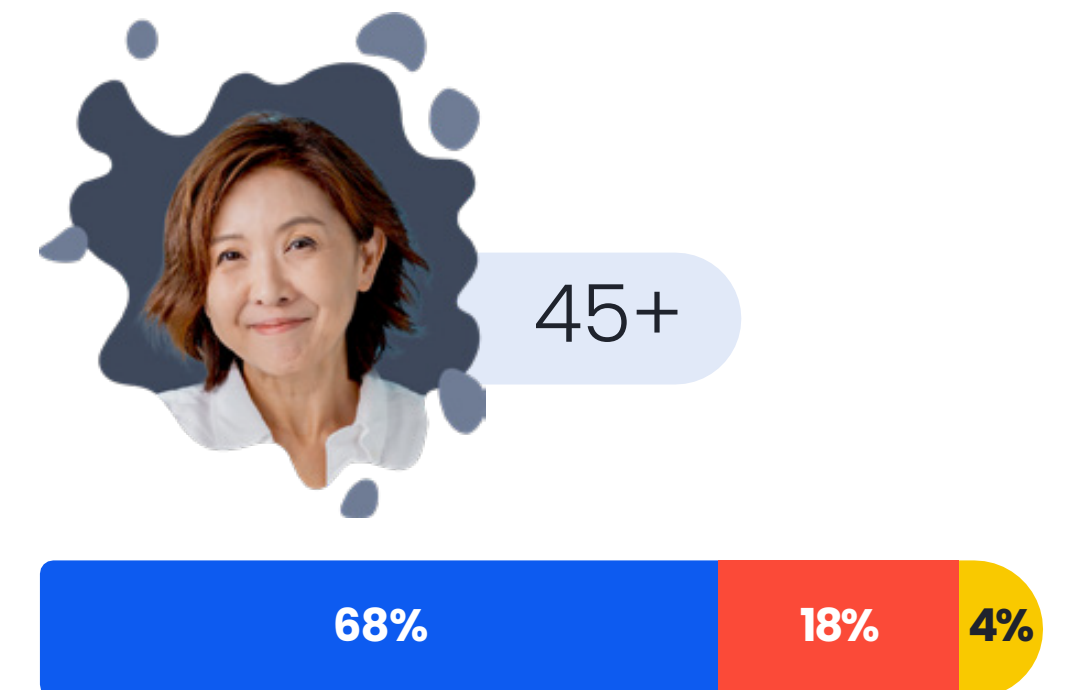


● Committed Gamers
 ● Regular Gamers
 ● Occasional Gamers

Most Indonesians, 80% and above are committed gamers, playing a mobile game every day. The love for mobile games spans across age groups, genders and cities, in Indonesia

# Committed Gamer Emerge Victorious

## Type of Gamers by Age



● Committed Gamers
 ● Regular Gamers
 ● Occasional Gamers

Gaming has become a very popular source of entertainment regardless of age and location. Access to smartphones and high-speed internet have been huge drivers in bringing about this change. Gaming is now truly accessible no matter who you are or where you're from.



# Mobile Gaming = Relaxation / Entertainment

## Top Reasons why Committed Gamers play



#1 Entertainment

#2 Relaxation

#3 Sense of Community/  
Making new friends

## Top Reasons why Married without kids play



#1 Relaxation

#2 Entertainment

#3 Sense of Community/  
Making new friends

## Top Reasons why GenX (45+) play Mobile Games



#1 Relaxation

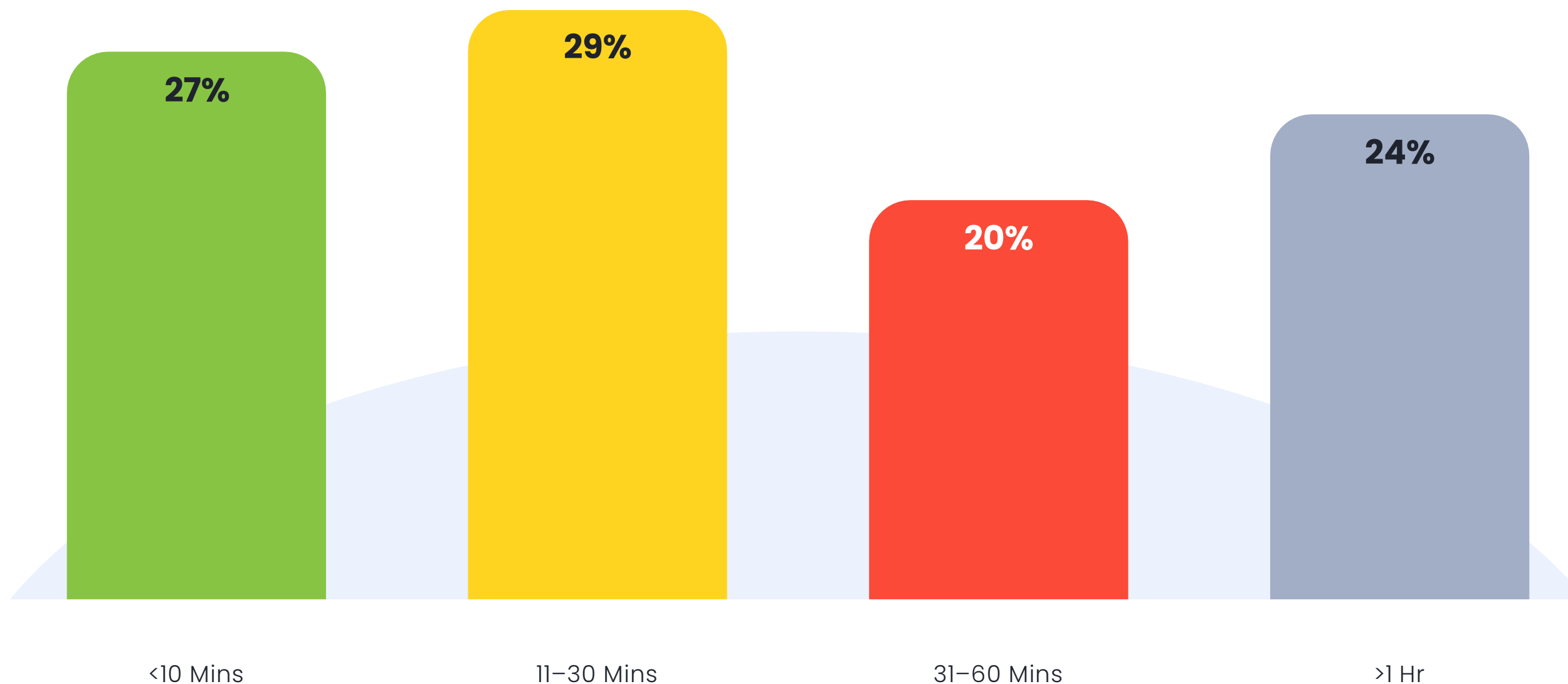
#2 To improve skills

#3 Entertainment/  
To compete and win

Mobile Gaming has democratized playing, helping users relax, unlike console gaming where competition and winning take top priority. With the rapid rise on multiplayer in-app games, gaming has also become an avenue for folks to connect with friends and family, harboring a sense of community on these apps.

# Snackable Entertainment Via Mobile Gaming

Time Spent per Gaming Session on Smartphones

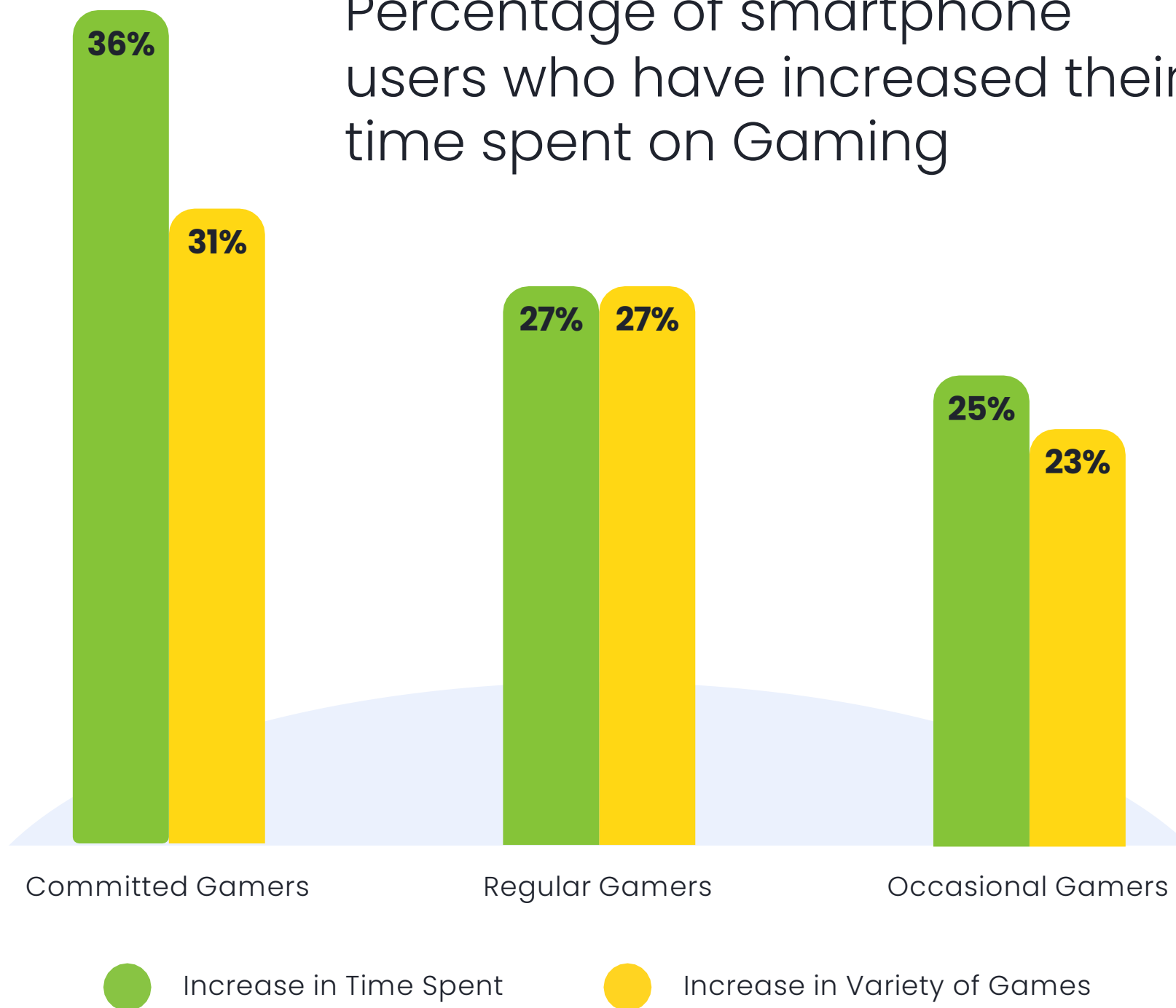


Unlike other countries where the majority play in short 10-minute spurts, Indonesians tend to play for a longer duration of up to 30-minutes or more at a time. With a wide variety of games available to them, Indonesians choose to play games that best suit the amount of time available to them



# Snackable Entertainment Via Mobile Gaming

Percentage of smartphone users who have increased their time spent on Gaming



Time Spent Per Session by Indonesian Gamers

Occasional Gamers



Regular Gamers



Committed Gamers

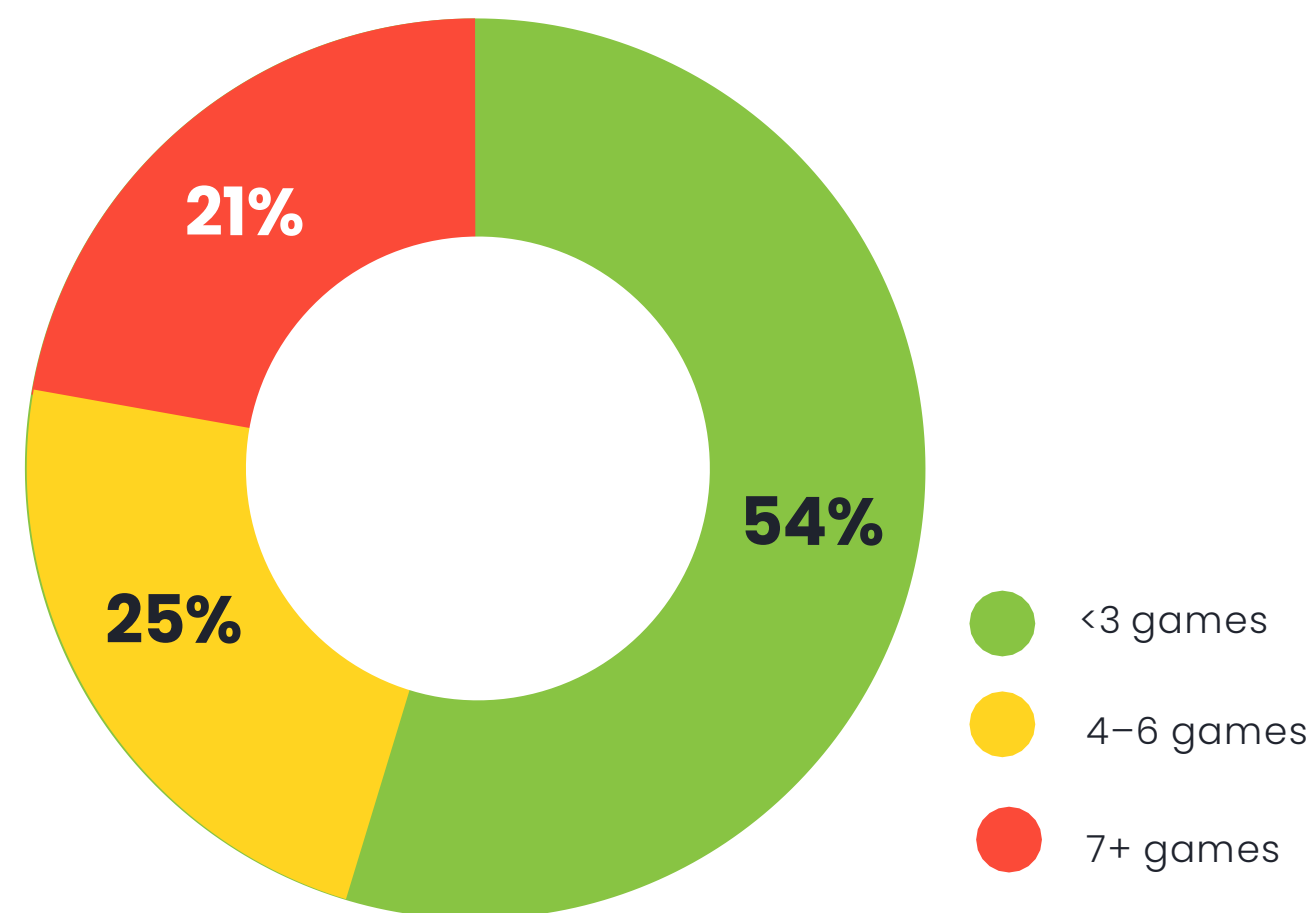


● <10 Mins   
● 11-30 Mins   
● 31-60 Mins   
● >1 Hr

A significantly higher share of Committed gamers spend up to an hour playing mobile games compared to Regular and Occasional gamers. The latter have a higher tendency to snack on mobile games in 30-minute sessions in a single sitting.

# The Race for Space

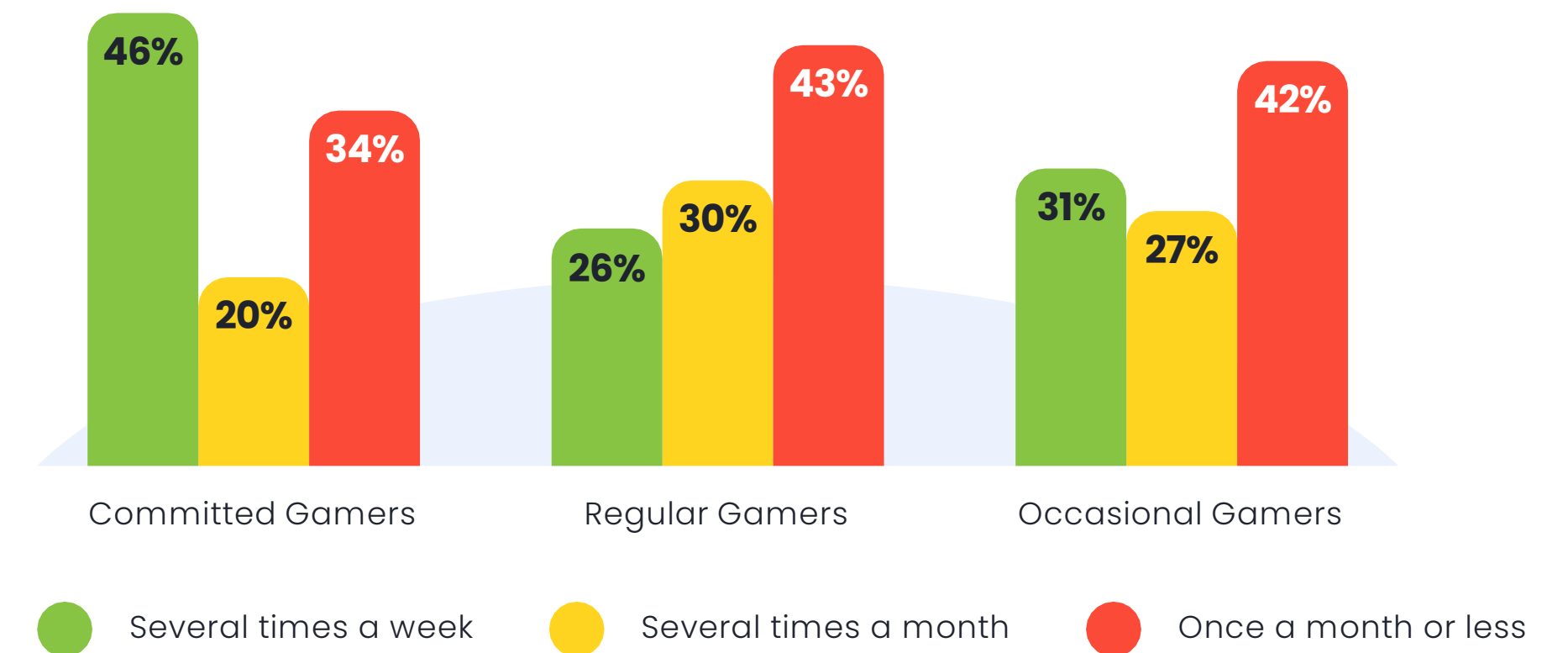
Number of Games installed by the  
Average Indonesian



Despite the availability of improved storage space on smartphones today, Indonesians have more apps to choose from. Combined with increasing app sizes, Indonesian gamers constantly choose between apps they keep on their smartphones

Source: InMobi Pulse Gaming Survey Indonesia, February 2021

Frequency of downloading new games



Indonesian gamers love exploring new games, especially committed gamers who play every day. These folks try new games every week compared to Regular and Occasional gamers who tend to experiment only a few times a month.



# Got to Play Them All!

## Games enjoyed by Committed Players



Multiplayer Online  
Battle Arena (MOBA)



Action/Arcade/  
Adventure



Simulation/  
Roleplaying/Racing



Strategy



Card/Puzzle/Board



## Games enjoyed by Married Women



Card/Puzzle/Board



Casual



Action/Arcade/  
Adventure



Sports



Casino



## Games enjoyed by Gen Z Players



Multiplayer Online  
Battle Arena (MOBA)



Action/Arcade/  
Adventure



Simulation/  
Roleplaying/Racing



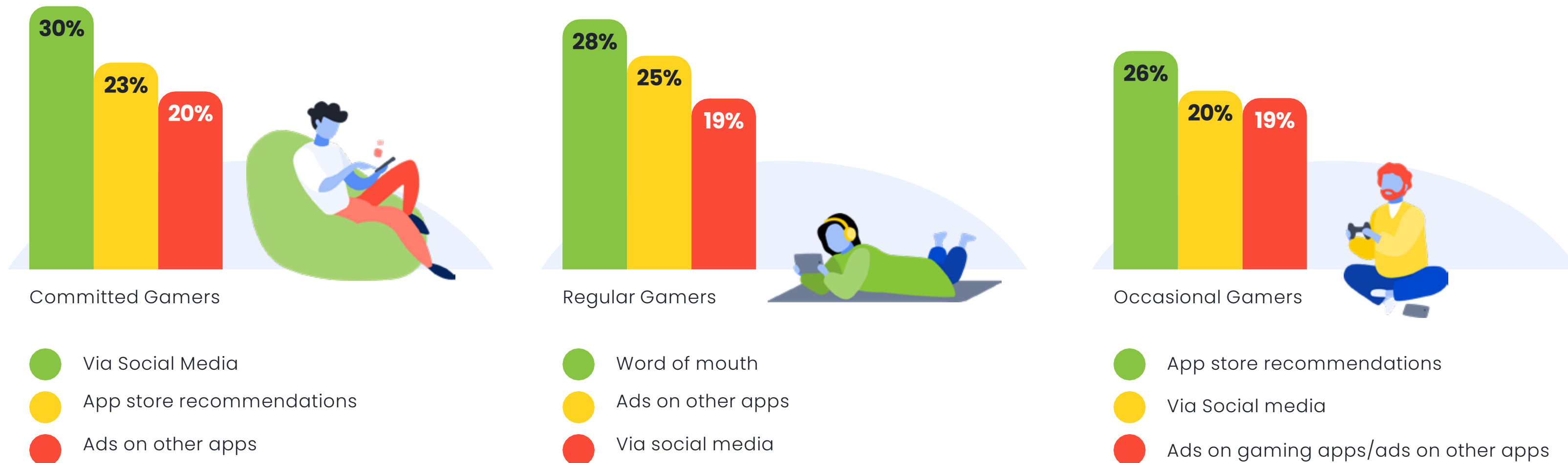
Card/Puzzle/Board



Sports



# Discovering New Mobile Games



When it comes to discovering new games, each avatar has a different source they like to tap into. Committed gamers are most likely to rely on social media and app store recommendations. Whereas regular gamers are far more likely to rely on word of mouth for their next download suggestion. Occasional gamers on the other hand are far more likely to rely on app store recommendations when compared to other groups as they are only interested in playing games that are already popular.



03

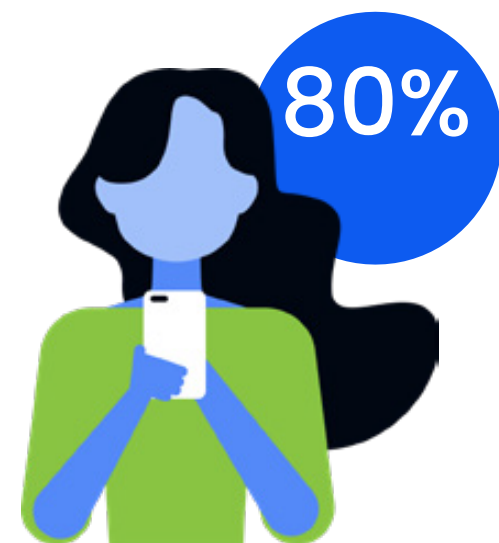
# Gaming Advertising MythBusters

Despite the explosive opportunity right in front of them, marketers seem to be hesitant when it comes to investing in the gaming space. They carry misplaced notions on the lack of personas, placements, engagement, and of course brand safety – but this couldn't be further from the truth! Let's bust some of the most popular myths the advertisers hold today!

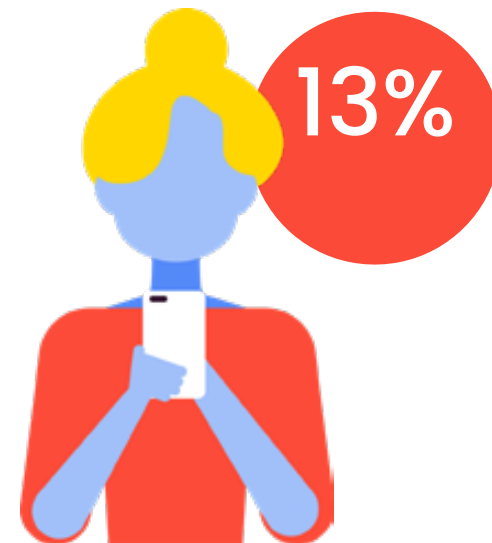


## Busting Myth #1: **Women have entered the arena!**

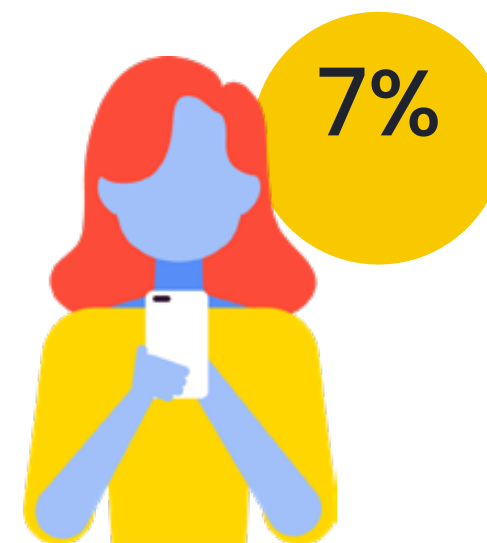
Women Gamers are highly Committed!



**Committed  
Gamers**



**Regular  
Gamers**



**Occasional  
Gamers**

### Games enjoyed by women above the age of 25



Card/Puzzle/Board



Casual



Multiplayer Online  
Battle Arena (MOBA)



Action/Arcade/  
Adventure



Simulation/  
Roleplaying/Racing



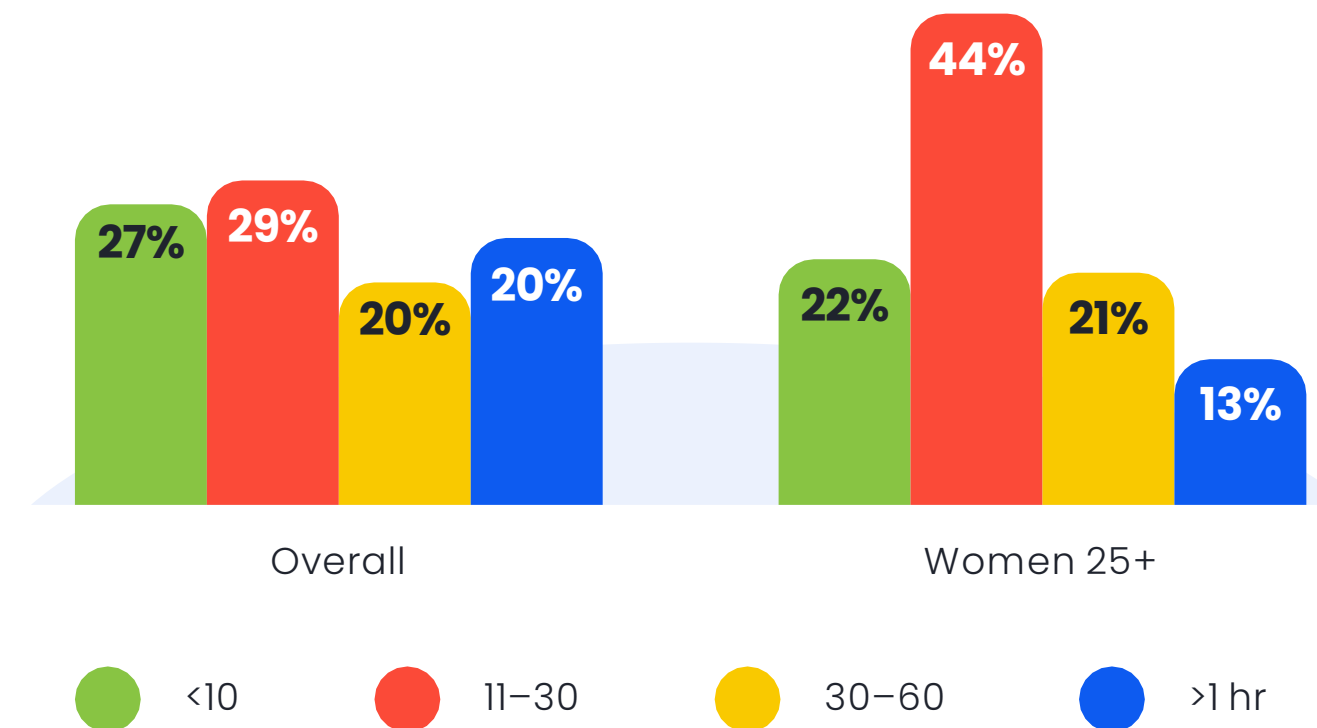
## Busting Myth #1: **Women have entered the arena!**

While some women gamers snack and play in 10-minute increments, a substantial share play for much longer – for up to 30-minutes per session.

Why do women gamers play?



Time spent per session



## Busting Myth #2: **One Gamer, Many Avatars**

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

### In pursuit of the other: Other Apps that Gamers use



### In pursuit of the other: Offline characteristics



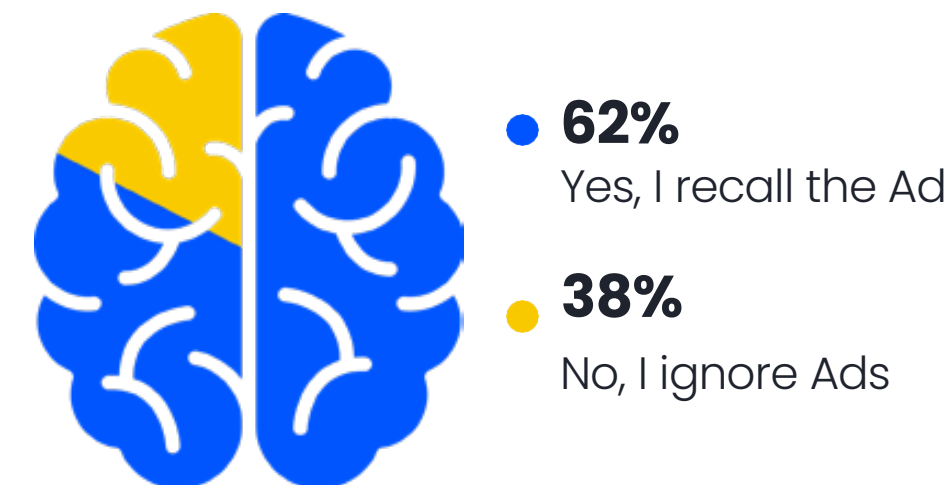
## Busting Myth #3: **An Engaged Audience**

Gamers are familiar with ads and clearly prefer to watch them over and above paying money when looking to progress in a game or in exchange for a benefit. Ad recall is also very high amongst Southeast Asian gamers, especially when it is about a topic of interest.

### Preferred method to progress in a game



### Ad Recall when playing Mobile Games



### Top Reasons for ad recall

- 1 When the ad is about a brand/ product or topic of interest
- 2 When the ad is engaging and interactive
- 3 When the ad helps them benefit in the game



## Busting Myth #4: **No Imposters Amongst Us**

Who's Spending on  
Gaming apps



Shopping



Retail/  
FMCG



Electronics/  
Gadgets



Travel



Automotive

Video Advertising Metrics on  
Gaming Apps

**80%**

of spending on gaming  
apps accounted for by  
top 5 industries

**40%**

higher VCR on ads on gaming  
apps on InMobi Exchange when  
compared to MOAT benchmarks

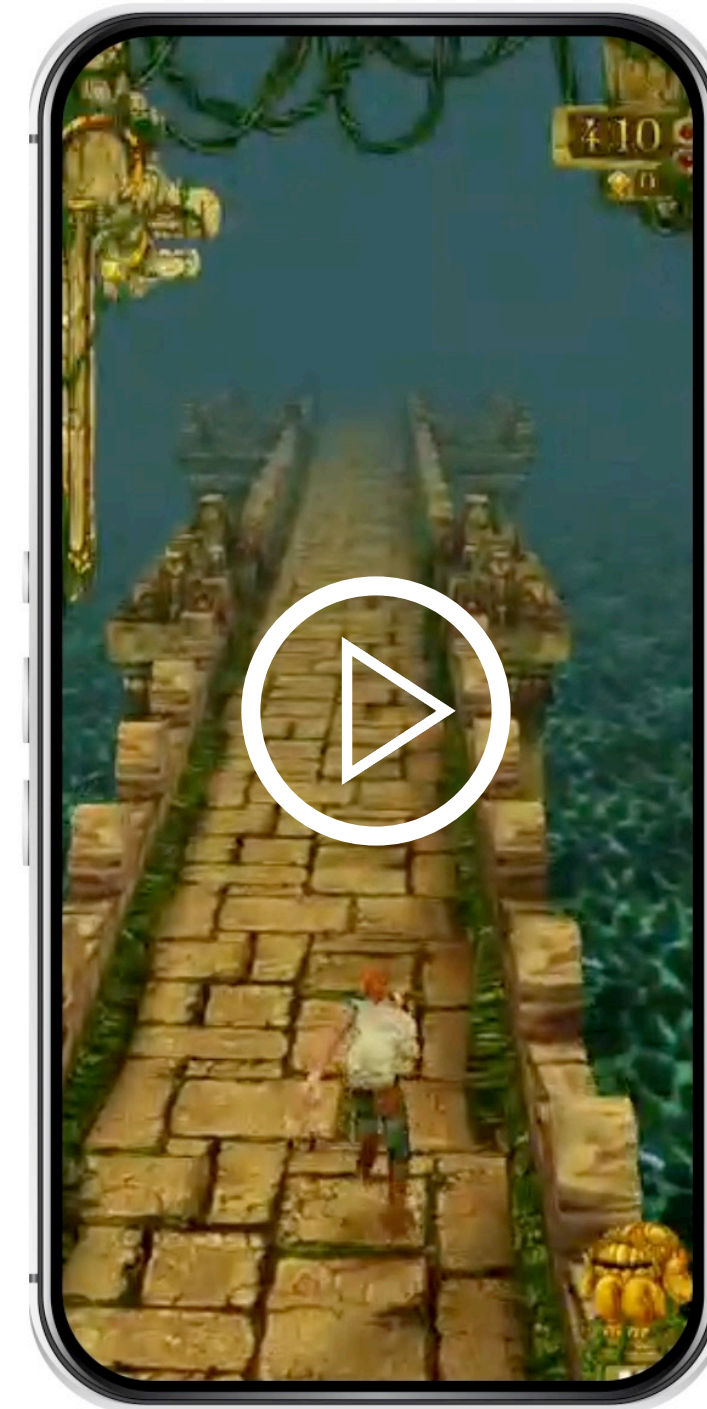
**38%**

higher CTR on ads on  
gaming apps on InMobi  
Exchange (horizontal video)

# Ready, Set, Game On!

Vertical video for the win

Full screen, vertical video ads are a great way to engage with your users. They occur during a natural break in the game play ensuring that there is no interruption in the game play and occurs only during natural breaks. Want to see it in action? Play the video to learn more!

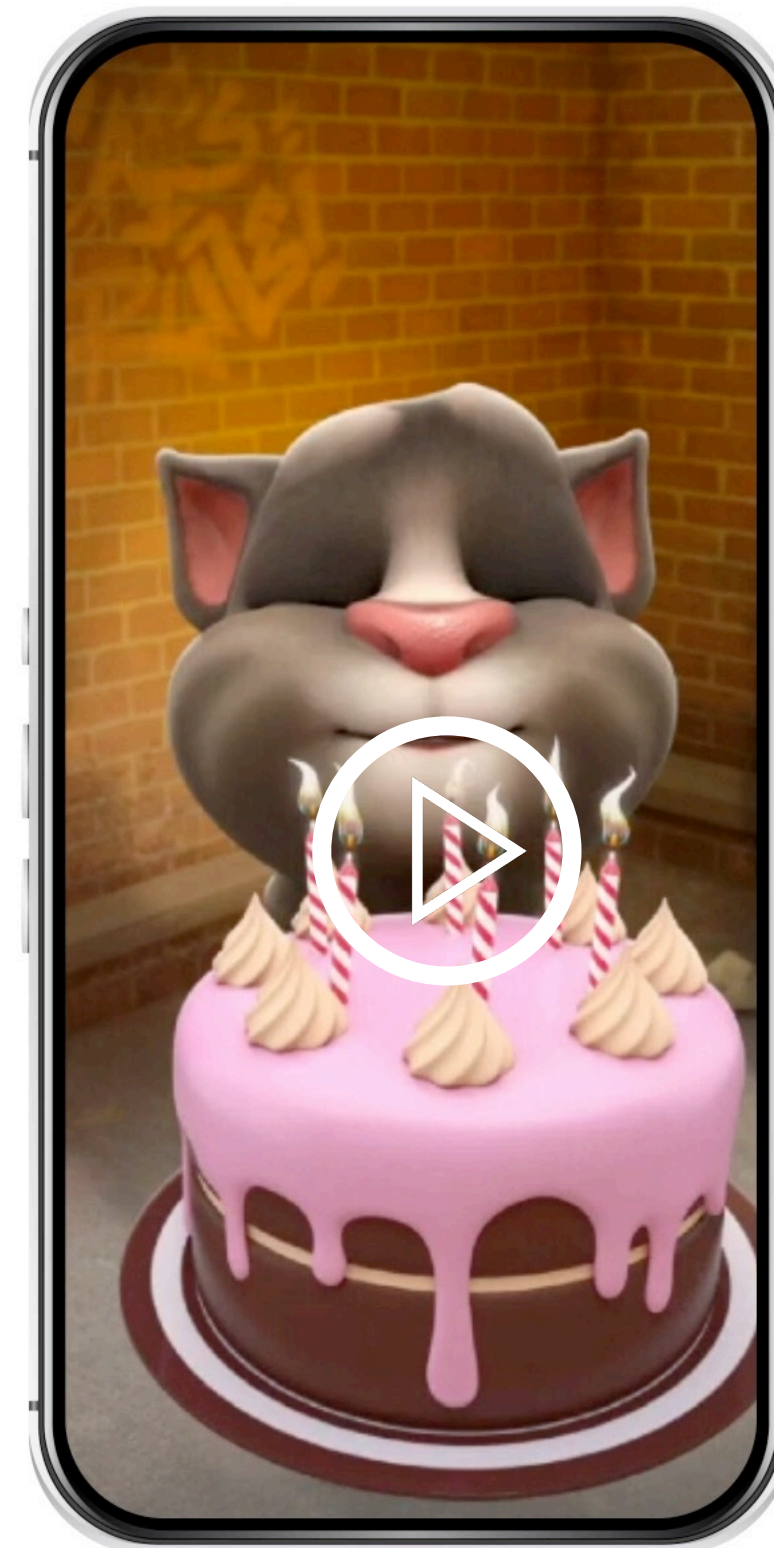


\* For purposes of illustration only

# Ready, Set, Game On!

## Rewarding Experiences with Rewarded Video

Rewarded video is a great way to engage with users in Southeast Asia as they look to advance in the game without having to pay. Brands can showcase impactful ads with a highly engaged and receptive audience. Want to see it in action? Play the video to learn more!



\* For purposes of illustration only



# Ready, Set, Game On!

Getting it right with Landscape Video

Horizontal videos are extremely popular in gaming environments making it easy for brands to leverage existing core assets. Like other formats, they appear during natural breaks during the game. Want to see it in action? Play the video to learn more!



\* For purposes of illustration only

# Ready, Set, Game On!

## Getting it right with Blended In-Game Advertising

This unique in-game inventory enables brands to reach premium mobile users with ads that blend into the game environment, like electronic advertising boards in an in-game sports stadium, in an esports arena or in the extremely popular casual and hyper casual gaming space.



\* For purposes of illustration only



# InMobi 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
- Always On
- Transparent
- Integrated

Interested in learning more? Write to us  
at [mobilemarketing@inmobi.com](mailto:mobilemarketing@inmobi.com)

