

# GLOBAL MOBILE GAMING MARKET 2015

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# Global Mobile Gaming Market 2015

## General Information

### Product Details

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### Questions Answered in This Report

- What is the current state and the future prospects of the global mobile gaming market?
- How high are the rates of smartphone and tablet usage for gaming in various countries worldwide?
- How large are the revenues generated by mobile gaming in major markets worldwide and what are their growth rates?



# Global Mobile Gaming Market 2015

## Key Findings

### Mobile gaming grows rapidly worldwide

Worldwide, mobile games are advancing their share on the total games market through rapid growth. More than a billion people worldwide played games on mobile devices last year. While smartphones are ahead in usage, revenues from games played on tablets are growing more rapidly. Another trend is distribution of mobile games from messaging app platforms, especially widespread in Asia.

Asia-Pacific was the largest mobile gaming market in 2014. In China alone, close to a quarter of a billion people were mobile gamers. In Japan, smartphones and tablets accounted for more than half of the total gaming revenues, while in South Korea mobile games managed to triple their share of the games market in just one year. South East Asia is another promising mobile gaming market, as more people there already are playing mobile games than online computer games.

In the USA, mobile gaming revenues from in-app purchases are growing much faster than from mobile game downloads. Similarly, in France free-to-enter games were most played on mobile devices. In Germany, smartphones topped computers as the device most used for game play last year and in the UK free mobile games had the highest penetration of all game types.

Mobile games are booming in other regions worldwide also. In Latin America, Mexico leads in share of smartphone users playing games on their devices, while in the Middle East & Africa, South Africa is another an example of a country where mobile gaming revenues are higher than revenues from computer online games.

While the both the number of mobile games and of companies publishing them are growing, the major titles are still coming from a few leading publishers, including King and Supercell. One major new development in early 2015 was strategic cooperation between video games company Nintendo and mobile games publisher DeNA. Among distributors, game app revenues on Google Play were growing faster at the end of the last year than those on the iOS App Store, while the latter performed better in terms of direct games spending.



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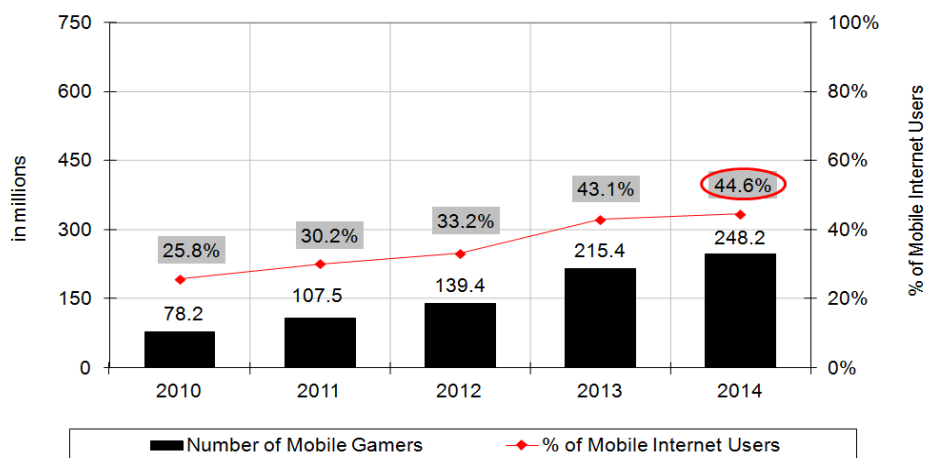
## Samples



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**There were 248 million mobile gamers in China in 2014, with penetration of 45% on mobile Internet users.**

China: Number of Mobile Gamers, in millions and in % of Total Mobile Internet Users, 2010 - 2014



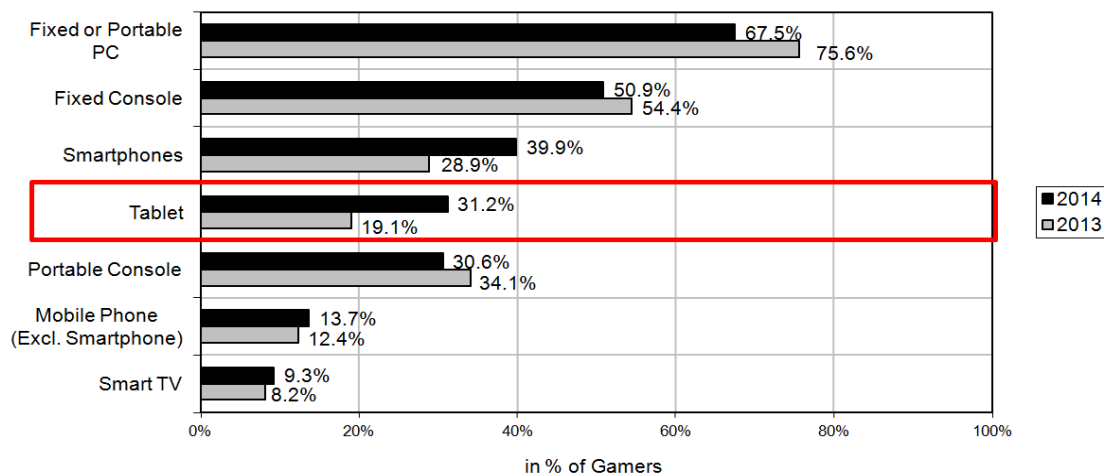
Source: China Internet Network Information Center, February 2015



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**Of all devices, “Tablet” gained the most in terms of share of gamers in France using it to play games, between 2013 (19%) and 2014 (31%).**

France: Devices Used to Play Video Games, in % of Gamers, 2013 & 2014



Note: does not add up to 100% due to multiple answers possible  
Survey: based on a survey of 2,800 individuals, aged 6-65, who played games online or offline in the previous 6 months, conducted online in September 2014  
Source: CNC, TNS, November 2014



# Global Mobile Gaming Market 2015

## Methodology

### General Methodology of Our Market Reports:

- This report includes the results of secondary market research: By using various sources we ensure maximum objectivity for all obtained data. As a result companies get a precise and unbiased impression of the market situation.
- This report covers the online gaming. It takes into account a wide definition of online gaming, including mobile and social gaming.
- Cross referencing of data was conducted in order to ensure validity and reliability.
- The report contains a Management Summary, summarizing the main information provided in each chapter.
- Besides providing information on the specific topic, every chart contains an Action Title, which summarizes the main statement of the chart and a Sub Title, which gives information about the country, the topic, the unit or currency, and the time period the data on the chart refers to.
- Furthermore, the source of information and its release date are provided on every chart. It is possible that the information included in one chart is derived from several sources. Then, all sources are mentioned on the chart.
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- This report includes mainly data from the last 12 months. The exact publication dates are mentioned in every chart.

### Methodology of Our Global Mobile Gaming Report:

- This report covers the global mobile gaming market. It takes into account a wide definition, including games played on mobile devices such as smartphones and tablets.
- The opening chapter of the report is devoted to global development, including global revenues.
- The rest of the report is divided by regions. The regions are presented in the descending order of total gaming revenues. Where applicable, the region was also divided by sub-regions.
- Within each regional chapter, the countries are also covered in the descending order of gaming revenues. For the leading countries in the region or sub-region, an overview of the market was presented first, summarizing important quantitative and qualitative data about total online gaming market and mobile gaming in particular. Afterwards, depending on data availability, the following information was presented: breakdown of total gaming revenues, including mobile, mobile gaming revenues and growth, information about mobile gamers.
- For the remaining countries, available relevant information about the mobile gaming market development was presented, such as revenues and devices used to play games, including mobile ones.



# Global Mobile Gaming Market 2015

## Frequently Asked Questions

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The target group of our B2C E-Commerce reports are decision makers in top-management, for example from the departments E-Commerce, Business Development, Strategy, Marketing, etc. from large corporations worldwide.

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- Red Bull
- BASF
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## Published Related Reports

Report	Publication Date	Price (excl. VAT)*
Global Online Gaming Market 2015	April 2015	€ 950
Europe Online Gaming Market 2015	April 2015	€ 950
Asia-Pacific Online Gaming Market 2015	April 2015	€ 950
Global M-Commerce 2015: Smartphones & Tablets	March 2015	€ 1,950
Europe M-Commerce Snapshot 2015	March 2015	€ 950
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Global Online Payment Methods: Full Year 2014	March 2015	€ 3,950
Europe Online Payment Methods: Full Year 2014	March 2015	€ 1,950
Asia-Pacific Online Payment Methods: Full Year 2014	March 2015	€ 950
Global B2C E-Commerce Market 2014	October 2014	€6,450
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Eastern Europe B2C E-Commerce Market 2014	October 2014	€ 2,950
Middle East B2C E-Commerce Market 2015	March 2014	€ 1,950
Africa B2C E-Commerce Market 2015	February 2015	€ 1,750

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Report	Planned Date	Price (excl. VAT)
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### 2. REPORT AND FULL-ACCESS SUBSCRIPTION OFFERS & ORDERS

**2.1** With respect to the purchase of our Market Reports, purchase can be made either online or offline.

**2.2** Our homepage contains information about pricing, acceptable payment methods and product brochures. To purchase a Market Report directly from our online shop, simply click „Add to Cart“, then „Proceed to Checkout“, where registration and payment details can be entered. As soon as payment is processed successfully, you will receive an Invoice via email and the Report will be available online for download.

**2.3** To purchase a Market Report offline (not via the online shop) simply print the Report Order Form from the appropriate online brochure or by clicking on the Fax Order button on our webpage. Simply fill out the Report Order Form, have a duly authorized representative sign the Report Order Form and then submit the Report Order Form to us via facsimile or email with PDF-attachment. Upon receipt of a completed Report Order Form, you will obtain an Invoice detailing the product ordered, price, and date of payment. Upon successful processing of payment, access and log-in details will be forwarded to the purchaser within two (2) business days.

**2.4** If you order our product "Market Reports", you gain access to the ordered report as identified in the Report Order Form and you may use that report in accordance with Section 5.3 below and the other provisions of the Contract.

**2.5** To purchase one of our Full Access Subscriptions, please contact us through the appropriate forum on our website, located under the Full Access tab on our homepage. Once we receive an inquiry, we will forward an Order Form to be filled out and signed by a duly authorized representative. Once this Order Form has been completed and signed, please send the Order Form via PDF attachment via email or via Facsimile. Upon receipt of the completed Order Form, we will send an Invoice detailing price of the „Full Access Subscription“ and payment method options. Upon successful processing of payment, access and log-in details will be forwarded to the purchaser within two (2) business days. The provision of this information constitutes the acceptance should you not have been provided with a separate acceptance in writing.

**2.6** If you order one of our "Full Access Subscriptions", you gain access to any E-Commerce reports within the scope of your chosen subscription (excluding all custom research services) currently available on our website during the subscription timeframe as identified in the "Order Form" as of the date of the execution of the Contract, and you may use those reports as a "Global Site License" in accordance with Section 5.3 below and the other provisions of the Contract.

### 3. CUSTOM RESEARCH OFFERS & ORDERS

**3.1** Unless expressly agreed upon otherwise in writing, the contents of our offers may not be made available in whole or in part to any third party outside your organization.

**3.2** With respect to research services, upon inquiry, we submit an offer to you in the form of a "Research Order Form" as a PDF, accompanied with a proposal stating the nature of the issue to be researched, the services to be rendered, the time required for the study, structure of payments (if any) and the total fee due. You accept this offer by completing the Research Order Form, having a duly authorized representative sign the Research Order Form and then submitting the Research Order Form to us via facsimile or email with PDF-attachment.

### 4. TERMS OF PAYMENT

**4.1** All prices for offline orders are to be derived exclusively from the Order Form and/or the documents referenced therein. All prices for orders placed via the online shop are those which are displayed on our website.

**4.2** All prices are net and without transportation costs, if applicable. Value Added Tax, if applicable, at the statutory rate shall be added to all fees payable hereunder.

**4.3** For all services that go beyond the scope as agreed under the Order Form, a reasonable additional fee for these services shall be discussed and agreed upon with the customer before commencement of any work and will be itemized on the final Invoice (if applicable) sent to the customer.

**4.4** We will send our invoice to you upon execution of the Contract, unless agreed otherwise in the Order Form. In the event that you order our product "Full Access Subscription", we will send our Invoice for the first contract year upon execution of the Contract. Any Invoice(s) for any subsequent contract year(s), will be sent to you upon commencement of each contract year.

**4.5** All payments shall be due and payable immediately upon the date set forth in the Invoice, without any deductions. Products will not be dispatched and services will not commence until successful processing of payment, excluding the case of custom research orders, in which structured payment terms will be outlined on the Order Form.

**4.6** All customers' rights of retention or set-off are hereby excluded to the extent that they are not based on the same contractual relationship. Retentions or set-offs are allowed only if the customer's claim is undisputed, has become unappealable or is ready for decision.

**4.7** In the event of a customer's default in payment or other apparent credit unworthiness, all remaining claims against customer shall become immediately due and payable in full. This only applies if the customer is responsible for the default. We shall be entitled to rescind payment terms previously agreed upon and to demand payment in advance or other appropriate security with respect to pending deliveries. A customer shall be deemed unworthy of credit in particular when he files a petition in bankruptcy or composition proceedings.

### 5. INTELLECTUAL PROPERTY RIGHTS AND INDEMNITIES

**5.1** All copyrights and other intellectual property rights in connection with our products and all contents of our website remain with us. All data carriers remain our property. The customer/user may not modify, publish, transmit, transfer or sell, reproduce, create derivative works from, distribute, perform, display, or in any way exploit any of the products made available by us, in whole or in part, except as expressly permitted under the Contract.

**5.2** We, as well as any original sources contained within our product, must expressly be named as the author of any data the customer processes further as contractually negotiated.

**5.3** Upon delivery of the product(s) to you and payment of the agreed fee, you obtain a non-exclusive, non-transferable, perpetual right to use the products provided for your internal purposes or any additional purposes set out in the Order Form.

**5.4** In the event that the parties agree on a "Single User License" under the Order Form, this means that only one (1) individually named user of an organization shall be entitled to access the reports. In the event that the parties agree on a "Site License" under the Order Form, this means that up to ten (10) users within a given geographical location (as specified in the Order Form) of an organization shall be entitled to access the report. In the event that the parties agree on a "Global Site License", this means that up to ten (10) worldwide users of an organization shall be entitled to access the report. In both cases, the term "organization" refers to your specific company only and excludes any third parties, including affiliates.

### 6. TECHNICAL INFORMATION

**6.1** We shall provide our products in the following standardized data formats: PowerPoint and PDF. For custom research reports, Excel documents may also be provided, upon request.

**6.2** You must ensure that you have the corresponding technical resources to make use of these data. You may not derive any claims in this connection on grounds of breach of obligation.

**6.3** Upon successful processing of payment, purchases made via the online shop will be immediately available to download. For all offline purchases, upon successful processing of payment, you will receive the requested product(s) and service(s) in the aforementioned standardized data formats, and all additional data pertaining thereto within two (2) business days.

### 7. DEFECTS AS TO QUALITY

**7.1** No claims for defects as to quality are triggered by insignificant discrepancies between our products and services and the warranted quality or fitness for use.

**7.2** Likewise, no claims for defects as to quality may be derived from entrepreneurial risks – e.g., with regard to questions of entrepreneurial discretion, an erroneous assessment of the market situation or the failure to recognize a business action's merit.

**7.3** Defect-based claims are further excluded in cases of excessive or improper use or in connection with damages caused by extraordinary conditions not reflected in the Order Form. This is also true in cases of subsequent changes made by the customers or third parties unless such changes do not affect the analysis and removal of a given defect.

**7.4** Claims for defects as to quality expire within one year from the commencement of the legal statute of limitation. This limitation does not apply to the extent that applicable law stipulates a longer period in cases of intentional or grossly negligent breaches of duty on the part of us, fraudulent concealment of a defect and injuries to life, body and health.

**7.5** Claims for damages and the reimbursement of expenditures are further subject to Section 9.

### 8. LEGAL DEFECTS

**8.1** We are liable for products and services infringing on third party rights only if and to the extent that our products and services are used in accordance with the agreed contractual requirements.

**8.2** Unless agreed otherwise, our liability for the infringement on third-party rights is limited to the territory of the European Union and the European Economic Area as well as the place of its services' proper use as agreed under the applicable Order Form.

**8.3** In the event that a third party asserts claims against the customer, alleging that a service performed by us violates its rights, the customer shall promptly notify us. If a service rendered by us violates third party rights, we shall choose one of the below actions, duly taking into consideration the customer's interests:

a) procuring for the customer the right to use the service; or

b) revising the service to render it free of legal violations.

**8.4** Upon our request, the Customer shall assist us with the defense against third party claims according to this section 7, with each of the Parties bearing the costs of the use of its own personnel and counsel.

**8.5** Claims the Customer may hold for legal defects expire in accordance with Section 7.4.

**8.6** Claims for damages and the reimbursement of expenditures are further subject to Section 9.

### 9. LIABILITY

**9.1** In cases of intentional misconduct and gross negligence, we are fully liable pursuant to applicable law.

**9.2** Besides Section 9.1, we are not liable for any damages, especially but not limited to any incidental, special, punitive or consequential damages, loss of profits or loss of data. This limitation does not apply to any claims for damages due to damage to life, body or health in cases of simple negligence and – subject to the limitations set forth hereinafter – due to damage caused by a breach of a material contractual obligation. Material contractual obligations are obligations that (i) you reasonably relied upon at execution of the applicable Order Form and (ii) was of critical significance to the outcome of performance.

**9.3** In case of a negligent breach of a material contractual obligation our liability for damages – except for damage to life, body or health – is limited to typical and at the time of the formation of this Contract foreseeable damage.

**9.4** The aforementioned limitations do also apply to our liability for fault by our bodies, employees and vicarious agents as well as our bodies', employees' and vicarious agents' personal liability.

**9.5** Our liability for damages under warranties (Beschaffenheitsgarantien) is limited to instances in which the warranty expressly includes such liability.

**9.6** Claims for the reimbursement of expenditures and other liability claims asserted by the Customer against us are subject to sections 9.1 through 9.5.

### 10. CONFIDENTIALITY

**10.1** The Parties shall hold in strict confidence for a period of 10 years of the formation of this Contract regarding all data and information materials of which they gain knowledge as part of a Contract, be it orally, in writing or otherwise, directly or indirectly, provided that such data or information materials are designated confidential or must be considered confidential based on their nature, and shall use them exclusively as part of the services covered by the relevant Order. This duty of confidentiality excludes data and information materials that:

a) were already known or accessible to any third party at the time of disclosure;

b) which is lawfully disclosed to you by a third party that is not subject to a confidentiality obligation regarding this data or information;

c) must be disclosed by order of and to a government agency or another competent third party; and d) must be disclosed to legal or tax advisors of the contractual customer in question for consulting purposes.

In the cases of Sections b) and c) above, the parties shall (i) promptly inform each other about a given request and prior to disclosing confidential information, and (ii) limit the disclosure of confidential information to the minimum required.

**10.2** We may use your company name and logo as a reference so long as no contractual details are divulged.

### 11. JURISDICTION, GOVERNING LAW, MISCELLANEOUS

**11.1** In Contracts with merchants, legal persons under public law, or special assets (Sondervermögen) under public law, the place of payment is Hamburg, Germany.

**11.2** In Contracts with merchants, legal persons under public law, or special assets (Sondervermögen) under public law, all disputes arising from or in connection with any Contract between the Parties shall exclusively be resolved through the courts of Hamburg. Governing law is German law under exclusion of the CISG.