

# ASIA-PACIFIC ONLINE GAMING MARKET 2015

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# Asia-Pacific Online Gaming Market 2015

## General Information

### Product Details

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Single User License:	€ 950 (excl. VAT)
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### Questions Answered in This Report

- What is the current state and furthermore future prospects of online and mobile games in the leading markets of the Asia-Pacific region?
- How does online gaming evolve in emerging markets of Southeast Asia?
- What major trends are shaping the digital gaming markets in Asia-Pacific and worldwide?



# Asia-Pacific Online Gaming Market 2015

## Key Findings

### Asia-Pacific Leads the Way in Global Mobile Gaming Boom

Asia-Pacific is reported to be both the largest and the fastest growing gaming market worldwide. While the shift to digital games is happening worldwide, Asia-Pacific already leads the way in mobile gaming revenues, topping all other regions in 2014. Asia-Pacific also stands out in online gaming on computers, with five countries from this region on the list of the top ten countries in online gamer penetration of Internet users last year. Overall, the online gaming market in Asia-Pacific is forecasted to retain double-digit growth rate for the coming years.

China, Japan and South Korea are the largest markets for online games in Asia-Pacific and among the most prominent worldwide. In China, the number of people playing games online is nearly four hundred million and a quarter of a billion play mobile games. Distribution of games through mobile chat applications is a major trend, with close to two-thirds of mobile gamers discovering new games through this channel. This trend is also persistent in Japan, where a popular messaging app LINE carries an ever growing number of mobile free-to-play games.. In South Korea, mobile games tripled their share of the gaming market between 2012 and 2013.

The South East Asia sub-region is increasingly gaining attention of the global games market players. In 2014, there were close to a hundred million online gamers there and even a large number of mobile gamers. Countries like Thailand, Indonesia, and Vietnam are expanding their market potential with growing Internet and smartphone penetration. While Oceania is an advanced sub-region in these two parameters, Australia and New Zealand are still seeing double-digit growth rates in the digital gaming segment.

Some major digital games companies operate in the Asia Pacific region. China-based Tencent, which both publishes and distributes games through its platforms, generated several billion of Euros in online and mobile games revenues in 2014. Japan, is home to prominent digital games publishers such as Nexon and GungHo, and made news in early 2015 announcing the strategic cooperation between video games maker Nintendo and mobile games developer DeNA.



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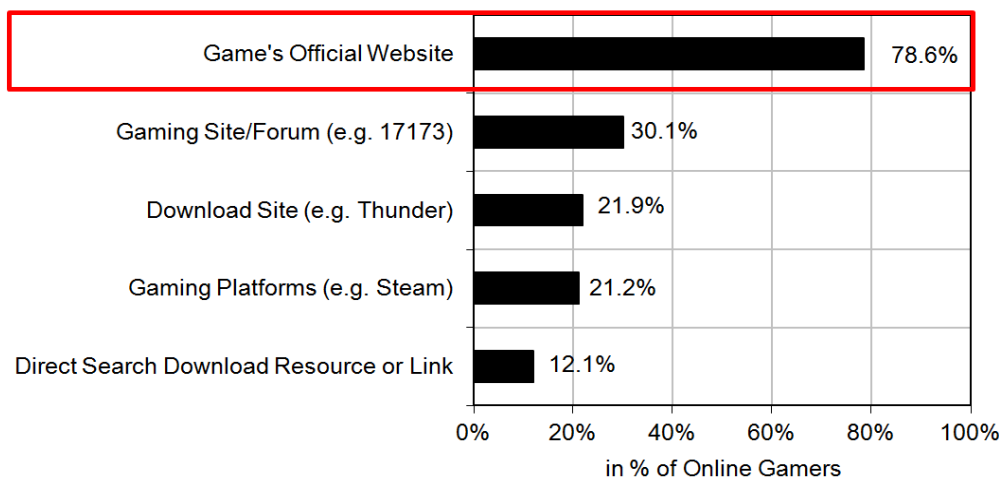


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**79% of online gamers in China downloaded online PC games from the “Game’s Official Website” in 2014.**

China: Online Games Download Channels, in % of Online Gamers, 2014



Note: only PC online gamers included; does not add up to 100% due to multiple answers possible  
Source: China Internet Network Information Center, February 2015

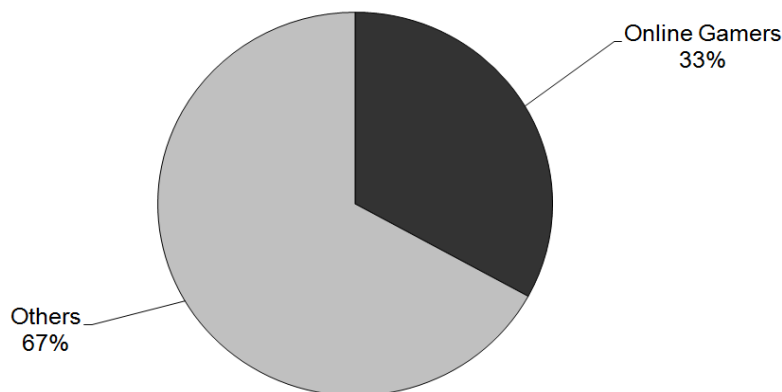


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**The penetration of online gamers on total Internet users in Vietnam in 2014 amounted to 33%.**

Vietnam: Online Gamer Penetration, in % of Internet Users, 2014



Survey: based on a survey of over 900 Internet users  
Source: Vietnam E-commerce and Information Technology Agency (VECITA) cited by Tuoitrenews, February 2015





# Asia-Pacific Online 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.
- This report also includes rankings. Within these rankings, it is possible that the total amount adds up to more than 100%. If this is the case, multiple answers were possible, and this is then mentioned in the note of the chart.
- If available, additional information about the data collection, for example the time of survey and number of people surveyed, is provided in the form of a note. In some cases, the note also contains additional information needed to fully understand the contents of the respective data.
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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 Asia-Pacific Online Gaming Report:

- This report covers the online gaming market. It takes into account a wide definition of online gaming, including mobile games.
- The opening chapter of the report is devoted to global development, including revenues and trends. In particular, mobile and social gaming trends were covered.
- The next chapter covers regional development and country comparisons.
- The rest of the report is divided by sub-regions. Within the sub-regions, countries are presented in the descending order of total gaming revenues.
- For the leading countries in the region, an overview of the market was presented first, summarizing important quantitative and qualitative data and trends. Afterwards, depending on data availability, the following information was presented: breakdown of total gaming revenues, including online and mobile, online/mobile gaming revenues growth, information about online/mobile gamers and gaming companies based in this country.
- For the remaining countries, available quantitative information about the online and mobile gaming market development was presented, such as revenues, penetration of online/mobile gamers and devices used to play games.



# Asia-Pacific Online 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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## Published Related Reports

Report	Publication Date	Price (excl. VAT)*
Global Online Gaming Market 2015	April 2015	€ 1,950
Europe Online Gaming Market 2015	April 2015	€ 950
Global Mobile Gaming Market 2015	April 2015	€ 950
Global M-Commerce 2015: Smartphones & Tablets	March 2015	€ 1,950
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**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 that 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 report(s). 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.  
**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 (Beschaffungsgarantien) 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.