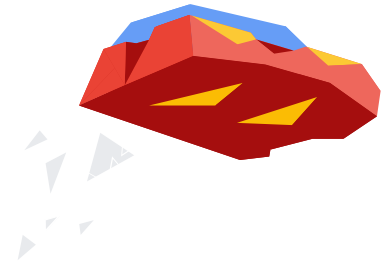




Beyond 2021: Where does gaming go next?

Asia-Pacific gaming market and consumer research report



Foreword

This report is part of a series where we cover the lasting impact of engagement and spending trends on games of the period between February 2020 and June 2021. This report covers the Asia-Pacific region. The series is the result of research conducted by Newzoo commissioned by Google and contains a combination of market analysis, trend research and consumer research.



The APAC gaming region and audience

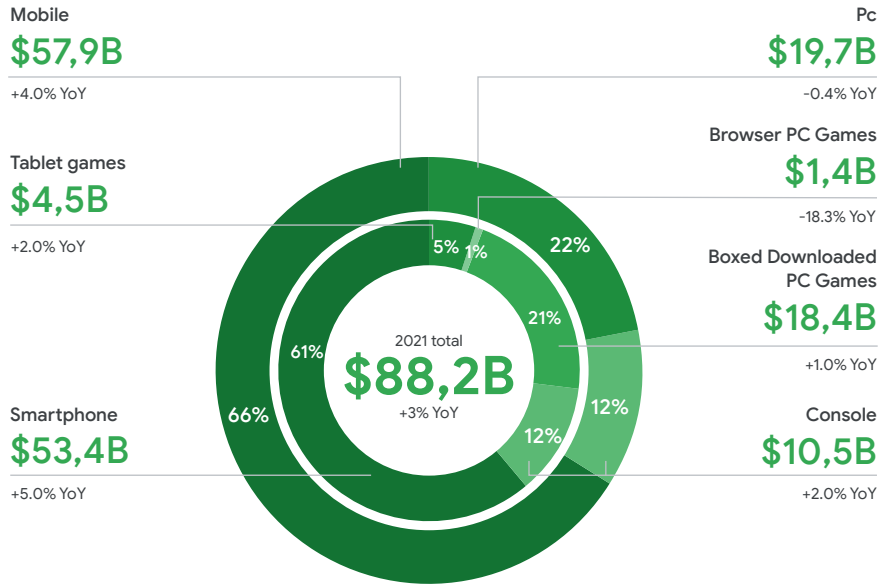


Asia-Pacific's importance to the global gaming market cannot be overstated. It is home to three of the top four gaming markets (by consumer spending), more than half of the world's online population, and 55% of players worldwide, who together represent a combined 49% of global consumer spending on games.

Asia-Pacific is a predominantly mobile-first market; there will be 1.62 billion players in Asia-Pacific (including Oceania) by the end of 2021, nearly all of whom play on mobile. The \$57.9 billion spend on mobile games represents a striking two-thirds of the region's total consumer spending.

For the most part, console gaming isn't as popular in Asia-Pacific as it is in the rest of the world; Japan, home to both Sony and Nintendo, is the exception. Largely driven by the Japanese

Fig.2 | Asia-Pacific games market by consumer spending



market and Oceania, Asia-Pacific's 249.6 million console players will spend a combined \$10.5 billion in 2021. While PC gamers have been switching

to mobile for the past decade, there's still a sizable PC gaming market in Asia-Pacific, largely due to the popularity of PC gaming cafés in mainland China and South Korea, where they are known as PC bangs. PC bangs have been at the heart of the subscription and free-to-play models and PC esports, but recently have declined in popularity. In part this was due to the changing business model, but COVID-19 also accelerated the shift to mobile.

Publishers from the Asia-Pacific region have been setting gaming trends for decades. The dominant free-to-play model now used by nearly all the top-grossing titles across PC, mobile, and console gaming was popularized in countries like South Korea and mainland

Fig.1 | 2015-2024 Asia-Pacific player forecast

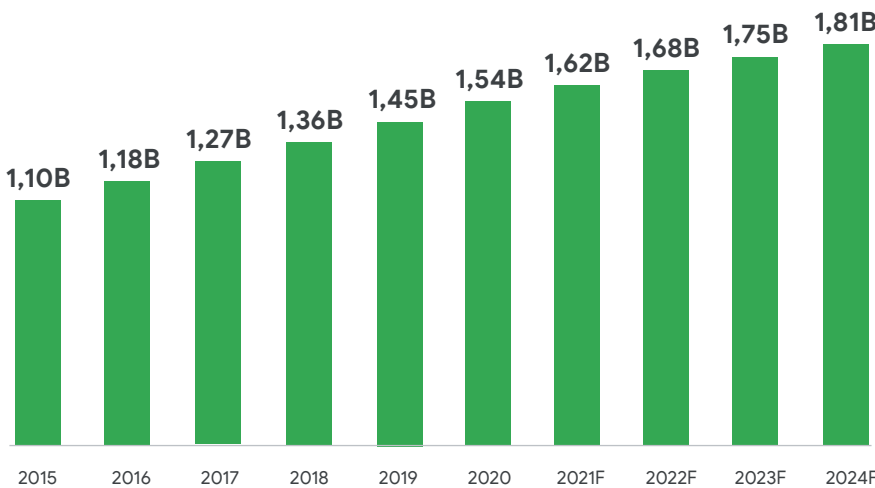


Fig.3 | Top 10 markets ranked by consumer spending on games in 2021 (markets in Asia-Pacific marked green)

	Country	Population	Internet Population	Players	Revenues (USD)
1.	Mainland China	1,444M	977M	685M	\$45.6B
2.	United States	333M	288M	191M	\$39.0B
3.	Japan	126M	115M	75M	\$20.7B
4.	South Korea	51M	49M	33M	\$7.5B
5.	Germany	84M	77M	47M	\$5.7B
6.	United Kingdom	68M	63M	37M	\$5.1B
7.	France	65M	60M	38M	\$4.0B
8.	Canada	38M	34M	21M	\$3.5B
9.	Italy	60M	54M	36M	\$3.2B
10.	India	1.3B	639M	356M	\$2.3B

China in the early 2000s as a way for publishers to monetize their many PC café users. The subscription model used by many of the world's largest massively

multiplayer online games (MMOs) evolved in a similar fashion in mainland China. Mobile gaming trends such as competitive, high-fidelity, esports-friendly titles are

transforming emerging markets like India and Vietnam today.

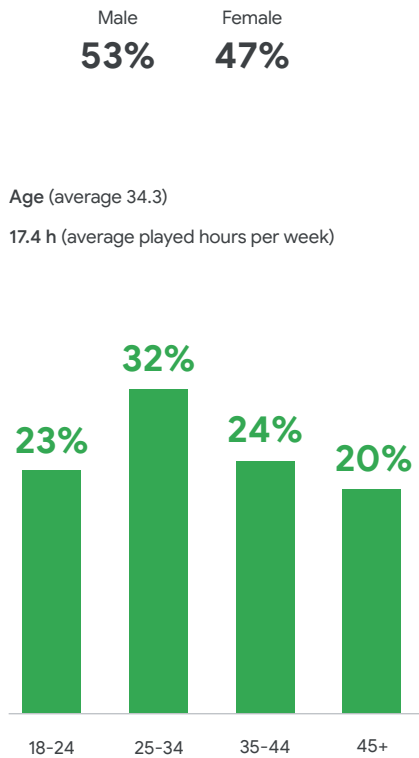
The Asia-Pacific games market remains as diverse as its community. Partly due to economic and regulatory circumstances, its major markets developed independently and each has its own preferences and local publishing giants. Rising technological literacy, affordable smartphones, and improvements to internet infrastructure are driving audience and consumer spending growth in multiple markets in Southeast Asia and India, the latter of which is already the world's 10th-largest

Asia-Pacific is a predominantly mobile-first market; **there will be 1.62 billion players in Asia-Pacific (including Oceania) by the end of 2021, nearly all of whom play on mobile**

market by consumer spending.

Our consumer research in Asia-Pacific focused on six markets: traditional gaming powerhouses mainland China, South Korea, and Japan, and regional growth markets Vietnam, India, and Taiwan. Given these markets' varying trajectories over the past few years, including the period between February 2020 and May 2021, it's no surprise that

Fig.4 | Demographics APAC gamer



- 6% New player since 2020 (base: 421)
- 14% Returning players since 2020 (base: 947)
- 80% Played before 2020 (base: 5,020)

the results differed wildly. This report covers the whole region, but also emphasizes noticeable differences between markets.

Taken as a whole, the demographics of players from our selected Asia-Pacific markets are similar to those from other regions. The average age of 34.3 is slightly younger than other regions. This minor difference is driven by the younger gaming population in growth markets like Vietnam and India, where older generations didn't grow up with gaming as generations have in more mature markets. One important note is that players in Asia-Pacific have the highest weekly average play time of all regions, at 17.4 hours per week.

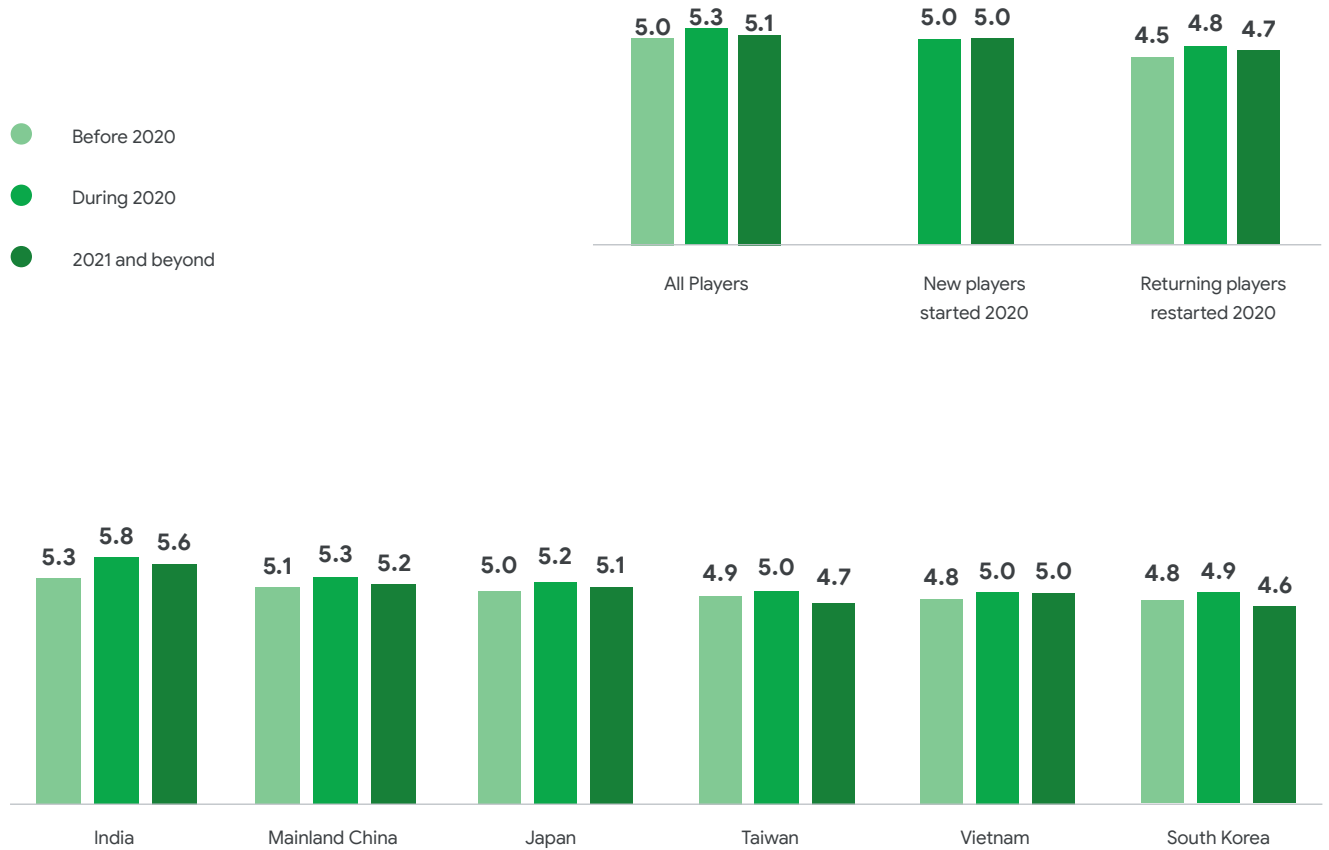
Broadly speaking, we can split our six Asia-Pacific markets into two groups. Players from Vietnam, mainland China, and India were already very positive about their gaming activity and tend to be bullish about their future activity as well. On mobile, play time across these three markets increased from +46% to +74% between February 2020 and May 2021, and expected future growth for play time is between +11% and +37%.

Players from Japan, South Korea, and Taiwan, on the other hand, tend to be more conservative about their present and future play time. Play time increased between +31% (Taiwan) and +46% (South Korea) in the same period, but future expected behavior is far lower, between +6% for Japan and dipping into negative (-7%) in South Korea. When asked to score the importance of video gaming in their lives, respondents from all our Asia-Pacific markets except Taiwan and South Korea indicate they expect video games to become more important, and the dip in these two markets is slight. 2020 saw more consumers spend more time and money on gaming. A large proportion of respondents, however, were already on board with the activity; to them, video gaming was already important, leaving less room for growth.

One noteworthy result is that returning players (those who resumed playing between February 2020 and May 2021 after having stopped) rate the importance of video games consistently lower. For these

Players in Asia-Pacific have the highest weekly average play time of all regions, at 17.4 hours per week

Fig.5 | Importance of video games (mean score out of 7) as rated by players in selected Asia-Pacific markets



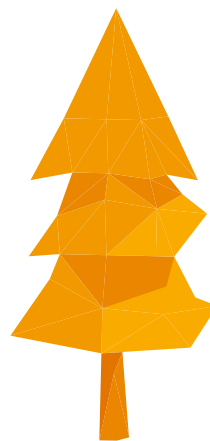
players, it's likely that the lack of entertainment options during COVID-19 lockdowns reignited

an interest in gaming, but they aren't as dedicated as veteran and new players. It could be that new

players, by contrast, would have started playing regardless; four out of our six markets still have a rapidly growing gaming audience.

The Asia-Pacific region is unique when it comes to video games in that it is both established in many constituent markets and primed for growth in others

The Asia-Pacific region is unique when it comes to video games in that it is both established in many constituent markets and primed for growth in others. One indisputable fact is that the region's tastes and preferences will impact every other market around the globe. For publishers looking to expand into Asia-Pacific, understanding the forces shaping the region is essential to informed strategy and decision-making.



Three themes that will shape Asia-Pacific



Theme 1: Gaming technology is promoting social engagement

For many years Asia-Pacific's leading game markets – mainland China, Japan, and South Korea – have set the global standard for social features in games. Tencent, for instance, the company that owns and operates WeChat, became the largest gaming company in the world by producing hit games like Honor of Kings and QQSpeed with

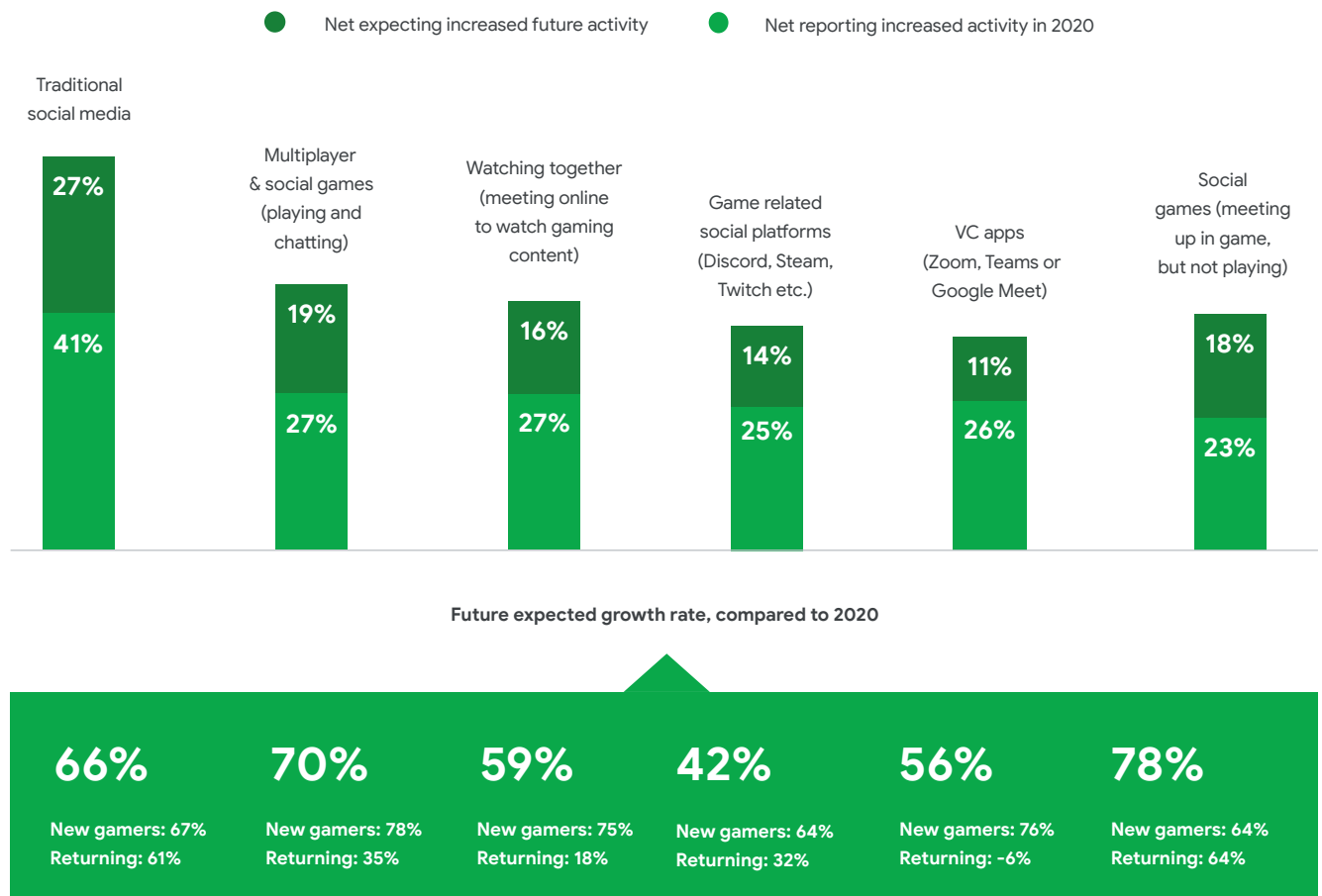
integrated social features.

An emerging trend in the West is using virtual gaming worlds as creative spaces and identities for shared social experiences, a collection of concepts popularly referred to as the metaverse. Asia-Pacific's historically blurred relationship between gaming and social apps suggest that the metaverse has many elements

that should appeal to APAC audiences.

There's a strong appetite for this type of gaming experience in most of the APAC markets we surveyed; we expect strong growth for social gaming, including (and especially) meeting up in game worlds, chatting and socializing while playing multiplayer and social

Fig.6 | Reported usage and expected future usage of social platforms in selected Asia-Pacific markets



games, and watching gaming content in groups.

New players tend to say they're more likely to continue using all social platforms in the future, apart from meeting up to hang out in game worlds (although they're also very likely to say they'll continue to do this). Returning players vary in what they say they'll continue to use, although their interest in game-world hangouts is high and matches new players' interest.

Although Japan and South Korean respondents expect their personal use of social platforms to decrease in the future, virtual non-gaming experiences may be different because of their ability to let users engage with influencers. In August 2020,

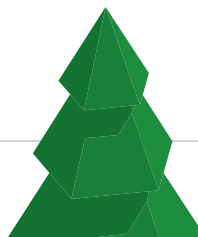
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Fortnite held its first live in-game event for Japan featuring local pop star Kenshi Yonezu. Later, Knives Out held a similar event geared towards its own Japanese audience. There's also a significant market for virtual

idols in Japan, which comes with its own unique collaboration opportunities. VTubers, for example — virtual avatars that replace real-life streamers and influencers — are already a popular group streaming Apex Legends. This preexisting interest may be why these virtual live events are so popular in Japan relative to the West.

Looking to mainland China, Tencent's vision for the metaverse — dubbed "Super Digital Scenario" — featured heavily in its 2021 Tencent Annual Game Conference. Its focus is to blur the boundaries between the online and offline worlds while placing a greater emphasis on integrating offline events than has been seen in the West so far. We saw the first tangible result of this focus last April and May, when Peacekeeper Elite featured collaborations with popular anime and movie IPs like Gundam and Godzilla and held an in-game concert for the title's two-year anniversary.

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Call to action for developers

Mainland China, Taiwan, India, and Vietnam are all seeing growing appetites among players to use games to socialize and share digital, metaverse-like experiences. South Korean and Japanese players have similar interest in virtual non-gaming experiences, but these might take a different form. While it's still early in the process, here are some important lessons and questions publishers should consider.

- How will the Western trend of the emerging metaverse evolve in Asia-Pacific markets? This is an opportunity for publishers to shape this new experience for an already highly receptive audience.
- Collaborating with the right local brands, leveraging locally popular IP, and hosting the right artists are an extremely important aspects of success. Localizing content to individual markets will be critical in a region as varied as Asia-Pacific.

But there are nuances as well. Publishers and developers must realize that this movement towards the idea of the metaverse will evolve differently in each constituent market, and that we will go through multiple phases of this evolution in which multiple metaverses can co-exist. Mainland China will be particularly distinct, as local content regulation and curation will make user-generated content — the driving force behind Minecraft and ROBLOX's success — more difficult. There's less appetite for these types of experiences in Japan (where we believe interest in VTubers and virtual idols will offer a substitute) and South Korea, although players in both markets do expect to increase their consumption of esports and live streamed game video content.



Theme 2: Console gaming reaches Mainland China and South Korea

Console gaming in mainland China, India, South Korea, Taiwan, and Vietnam has never quite reached the popularity it has in Japan and non-Asian markets. Console still has a smaller player share than mobile and PC, and the lowest number of people who call it their most-used platform of those three major gaming platforms.

There are many reasons why consoles lag behind PC and mobile in Asia-Pacific markets other than Japan. To start, consoles and their games were banned in mainland China from 2000 to 2014. In South Korea, meanwhile, the local preference for online competitive and cooperative games didn't match the single player-focused

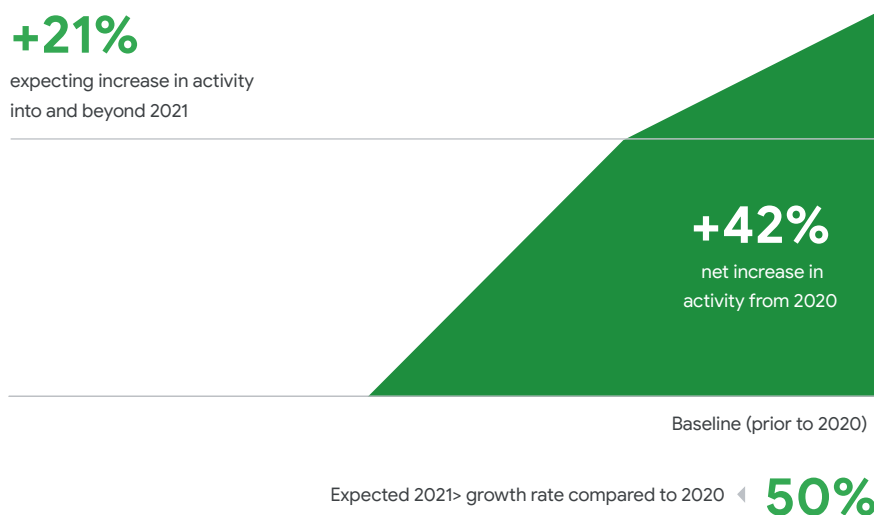
titles that drove console sales. As a result, neither mainland China nor South Korea had an installed base that garnered significant investment from the three major console developers.

But a major shift took place during the pandemic, when this mismatch in preferences was largely disrupted due to the popularity of the Nintendo Switch and its mobile-friendly functionality. The partnership between Tencent and Nintendo to launch the Switch finally made Nintendo's console and games available legally in mainland China, where its franchises have been popular throughout the ban. In South Korea, the pandemic may

have pushed a largely mobile gaming community to crave the more polished experience that consoles can provide. The launch of PlayStation 5 and Xbox Series X|S created further interest in consoles, as this marked the first console generation that launched in mainland China contemporaneously with other major global markets. Players noted a net increase in console gaming activity of +42% after February 2020 and expect their activity to grow another +21% going forward.

Other factors have also influenced the appetite for console games in both countries. Certainly the temporary closure of PC cafés played a role. But many players also discovered that consoles offer a gaming experience that's difficult for mobile games to match. After the Switch became available in mainland China, players found it offers the same on-the-go gaming experience that mobile gaming offers. High-fidelity mobile games, which we define as games featuring advanced graphics and/or complex mechanics and gameplay, have taken a 70% share of consumer spending in mainland China, the exact type of mobile games that would benefit from consoles' larger screen and controls.

Fig. 7 | Growth in console playing activity between February 2020 and May 2021 and expected increase after May 2021

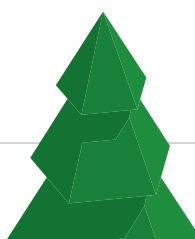


Call to action for developers



While consoles initially struggled to gain a foothold in mainland China and South Korea, that's no longer the case. Publishers across all platforms have a massive opportunity to offer high-quality experiences on consoles, particularly on Nintendo Switch, now that they have an installed base and the ability to match the preferences of local gaming audiences. In order to succeed on consoles in Asia-Pacific, publishers should identify:

- Games that reimagine (or simply port) experiences from mobile to console, enticing mobile gamers to replay their favorite games in a newly rich and immersive way
- Strong regional partners that can help reimagine their games on a new platform by localizing existing console games
- New console experiences that fit the gameplay and storytelling preferences of these new audiences



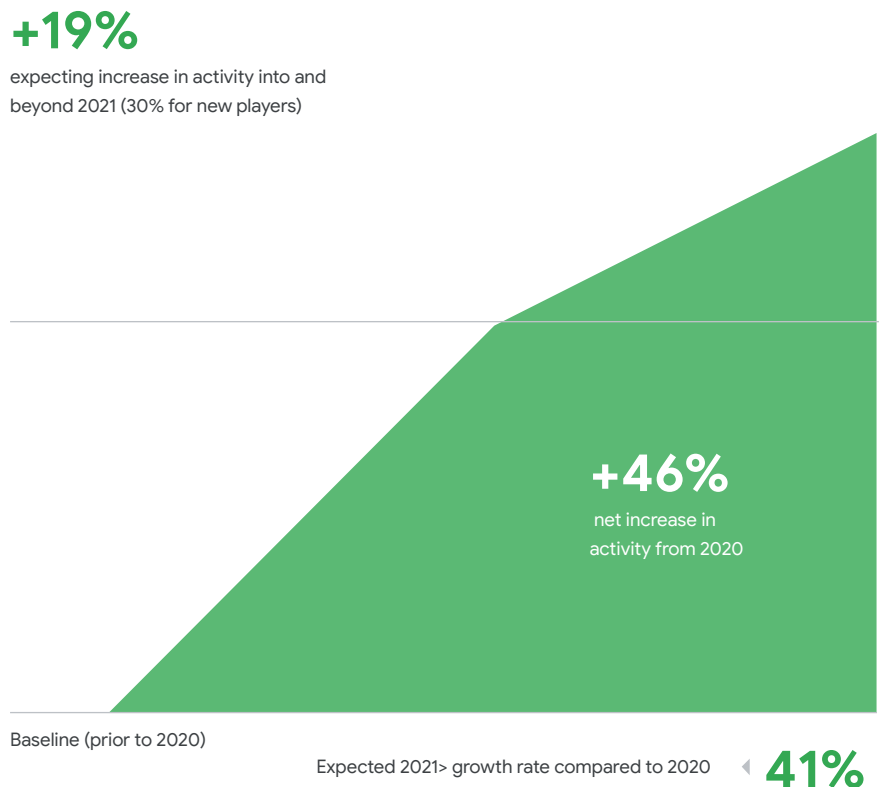
Theme 3: Asia-Pacific will continue to be a mobile-first gaming region

Mobile is the world's most popular gaming platform, and its share in Asia-Pacific is larger than it is anywhere else. This may be a result of Asia-Pacific's high mobile penetration rates and subsequent high usage as a primary gaming device. 92% of players in Vietnam, for example, use mobile as their primary gaming device, as do 90% in India.

The Asia-Pacific gaming audience's appetite for mobile gaming is truly unrivaled. Across all Asia-Pacific markets, including those outside the scope of this report, 97% of all players play (at least) on mobile. 88% of gamers in the markets covered by our research play on mobile the most, and consumers in Asia-Pacific spend 66% of their total gaming budget on mobile games. While Asia-Pacific is already home to many of the largest markets for mobile gaming by players and revenue, mobile gaming activity still grew during the pandemic, and 19% of mobile players expect their play time to increase in 2021 and beyond.

Players reported an increase in mobile gaming activity in 2020 across every market we covered in Asia-Pacific. South Korean mobile players are the only ones that believe their mobile gaming activity will decrease into 2021 and

Fig.8 | Growth in mobile playing activity between February 2020 and May 2021 and expected increase after May 2021



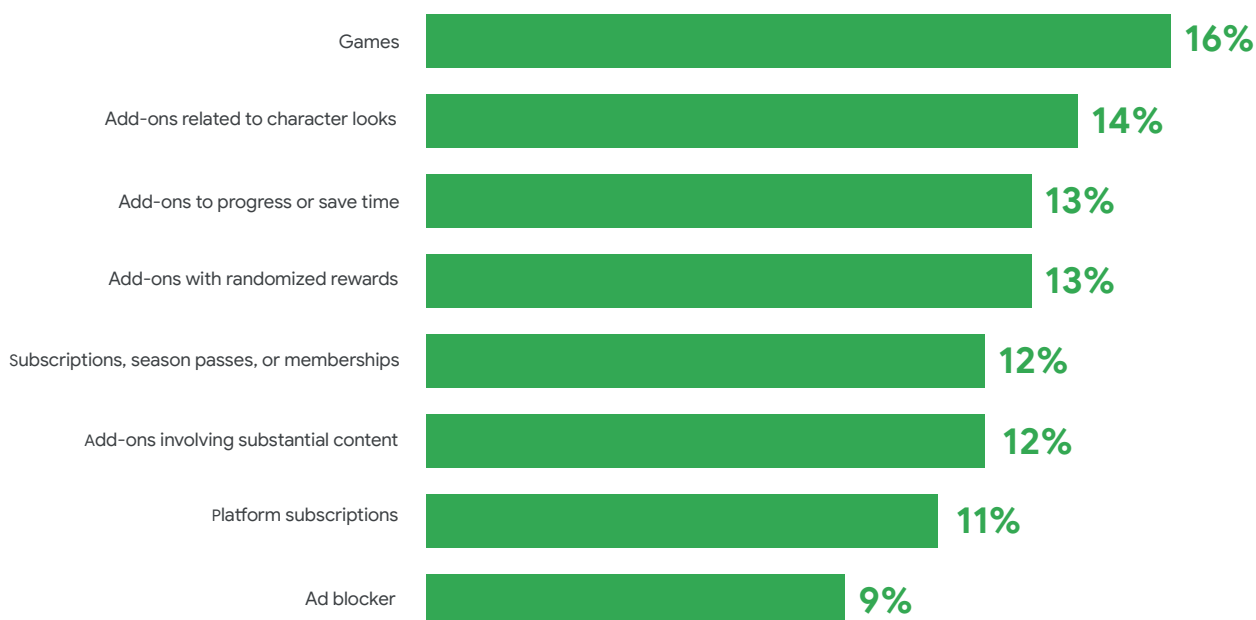
beyond (-7%). But this isn't too concerning, since these players' activity increased +46% in 2020, suggesting this is a correction rather than an outright decrease.

Clearly there's a passionate audience for mobile games in Asia-Pacific. Despite including nearly 1.2 billion mobile players by the end of 2019, the mobile player base expanded during the pandemic, with 5% of players being new and 13% returning to

mobile games. Although part of this growth could be due to pandemic-related events (e.g., the closure of PC cafés), 30% of new players expect their activity to increase after May 2021. This new hobby is here to stay.

A monetization strategy for mobile games in Asia-Pacific needs to account for the wide variety of players and markets. Since free-to-play dominates the platform, for instance, giving

Fig.9 | Share of mobile budget spend by category based on answers of players in selected Asia-Pacific markets



▶ **India, Mainland China & Vietnam:**
Players tend to expect spend to increase everywhere, often by quite a lot (+27% avg. net number of players across all categories*)

▶ **Japan, South Korea & Taiwan:**
Players indicate moderate change in spending (+5% avg. net across all categories)

players numerous options for items to purchase helps convert players into payers. This range in preferences is reflected in players' spending habits. Asia-Pacific's mobile players, having long ago become accustomed to free-to-play monetization and expressing themselves through their avatars, now spend their budget on a

much wider range of items than do players in other regions. This finding also applies to PC and console games; Asia-Pacific's PC and console players spend on a wider variety of categories than their peers in other regions. Although for console, Japanese players' preference to buy full games (and Nintendo's catering

to that preference) means that full games on PC and console take a slightly larger share of budget (21%). Outside of Japan, however, it makes sense to offer a wide variety of spending options across all platforms, as Asia-Pacific's players are willing to spend on a variety of add-ons for a better gaming experience for their playstyle.

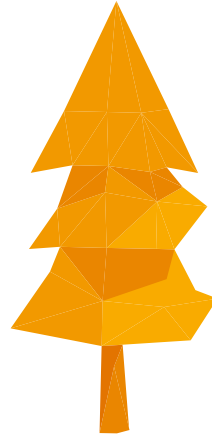
Call to action for developers

Asia-Pacific is a mobile-first region and, based on the development and intentions of the audience we surveyed, that isn't going to change anytime soon.

This growth is particularly strong in India, mainland China, and Vietnam. New players are equally optimistic about their future playing behavior as veterans, with gamers keen to spend on a diverse array of in-game items and benefits.

- Don't be afraid to branch out on your monetization strategy on mobile, as gamers here are more receptive to different ways to enhance their gaming experience.
- Focus on retention; new players want ways to stay and play while returning players indicate they are likely to churn.
- As consoles gain market share in mainland China and South Korea, consider offering mobile-like spending options, as console players in the region are open to spend on a variety of add-ons.
- Based on the increasing popularity of consoles, consider how a mobile game can be lightweight while also retaining highly immersive and rich elements.





Final thoughts

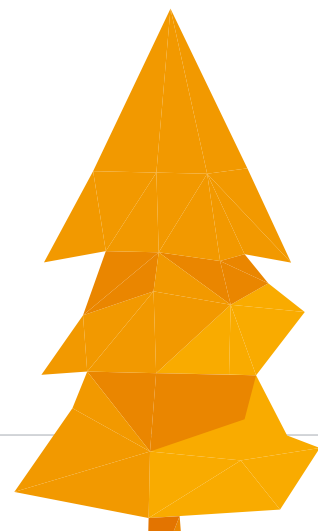
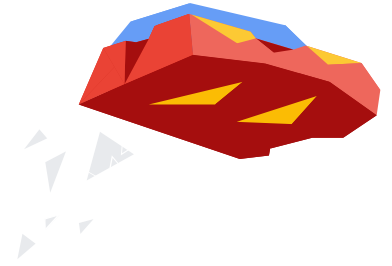


Players in Asia-Pacific report increases in the amount they played since the start of 2020, and expect these increases to continue, albeit at a slightly reduced rate. Asia-Pacific has always been described as a mobile-first market, and this gap between mobile and other platforms widened during the pandemic.

But the unique circumstances of the COVID-19 period have ushered in a new era in gaming. Virtual, digital experiences are changing the way we connect to one another in gaming worlds. Yet it's important to understand how preferences change in different markets. Gamers are demanding richer,

more immersive experiences with dedicated consoles. Finally, mobile proved to be an accessible entry point into gaming in Asia-Pacific, with further growth on the horizon.

What does all this hold for gaming in Asia-Pacific moving forward? How will the online and offline experiences evolve and merge through mobile? How might this impact the emerging trend toward the metaverse? How will consoles make way for the detail, realism, and immersive nature of virtual worlds and virtual technology? The seeds have been planted in a time where more people than ever have sought joy, escape, and connection in the gaming universe.



Country profile



Mainland China

Mainland China is one of the world's highest-potential games markets. Its already massive engagement is only increasing, representing opportunities for both brands and publishers.

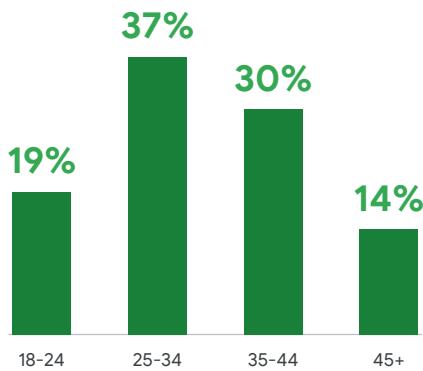
As both the biggest and one of the fastest-growing games markets globally, the Mainland Chinese game market is a sound investment for many brands game publishers. Its gamers are some of the most engaged in the world, spending an average of 19.2 hours

per week on the pastime (the highest of all 16 markets covered here). Like many countries, the gender split of gamers is relatively equal and reflects the global average, and the majority of gamers covered in this analysis are in the 25-44 age group. Mainland

China saw healthy engagement growth across all segments—playing and viewing—from 2020 into 2021 and beyond. Challenges regarding game licenses aside, Mainland China's market is massive and growing in terms of revenues, engagement, and its player base.

Gamer demographics Mainland China profile

Male **52%** Female **48%** Age (average) **33.1**



7% New players since 2020 (base:79)

13% Returning players since 2020 (base:147)

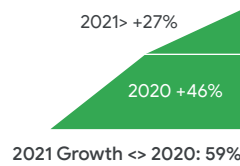
80% Played before 2020 (base:909)

19.2h Average played hours per week

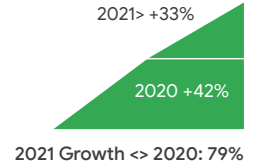
Engagement KPIs

Charts show players who report/expect to play more MINUS players who report/expect to play less

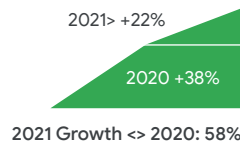
Mobile



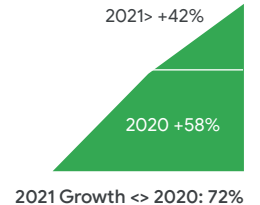
Console



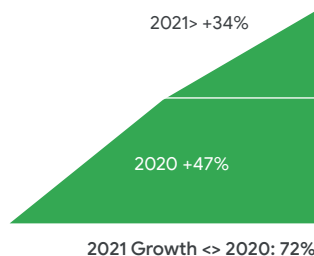
PC



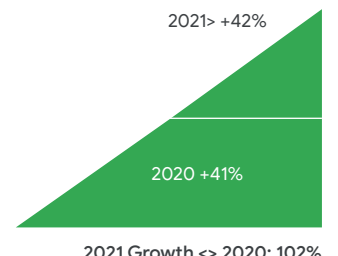
Cloud



Watching streamers



Watching esports



Definitions

2020 = Net % increase in activity from the start of 2020*
 2021> = Net % expecting increase in activity into and beyond 2021
 2021 Growth <-> 2020 = rate of expected growth compared to 2020*

Notes/ questions: * Players reporting an increases, minus those reporting a decrease (note: 2020 figure counts all new players as an increase). ** The projected future net increase divided by 2020's net increase. A12: Since the start of 2020, have you been playing/ watching more, less, or about the same amount, compared to before? (all respondents playing/ watching). F3: How if at all, do you think this might change, once things stabilize, after COVID-19? (all respondents playing / watching)

India

India—like Mainland China—is a high-potential growth market filled with opportunity. It boasts the highest engagement growth of all markets covered.

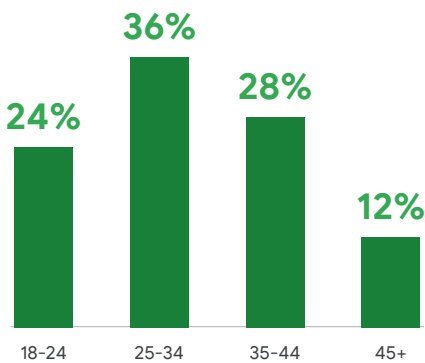
India is a key growth market with a massive population, marking exciting opportunities for many games publishers and brands. Gamers in India skew young and are highly engaged, boasting average play hours of 15.1 hours per week. Taken as a whole,

India's engagement-growth KPIs are more positive than any other country covered in this report. India is an overwhelmingly mobile-first games market, but the segment will still undergo striking growth. The country has the highest net growth for mobile

engagement from 2020 (+74%)—as well as the highest growth into 2021 and beyond (+37%). The same can be said about every playing and viewing segment, making India one of the world's highest-potential long-term gaming investments.

Gamer demographics India profile

Male **53%** Female **47%** Age (average) **32.2**



7% New players since 2020 (base:59)

17% Returning players since 2020 (base:184)

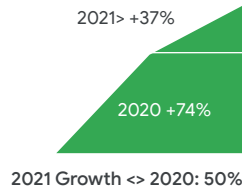
77% Played before 2020 (base:814)

15.1h Average played hours per week

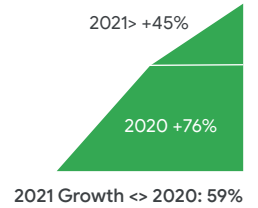
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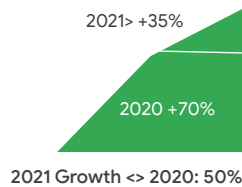
Mobile



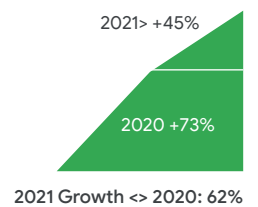
Console



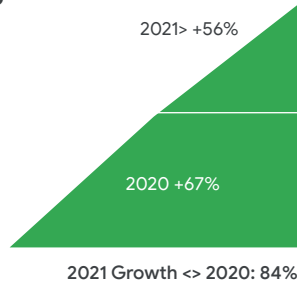
PC



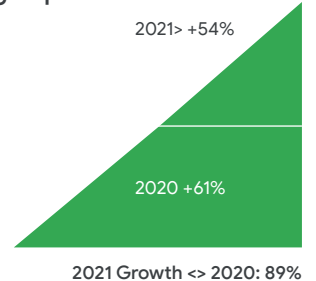
Cloud



Watching streamers



Watching esports



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Japan

Despite being a mature market with high engagement, Japan's players will become more engaged across all segments into 2021 and beyond, making it an opportunity-filled market.

Despite its small population compared to markets like Mainland China and the U.S., Japan is among the global games market's biggest revenue generators, driven by its highly engaged gamers who spend an average of 16.9 hours per week playing games. Japan's gamers skew older compared to

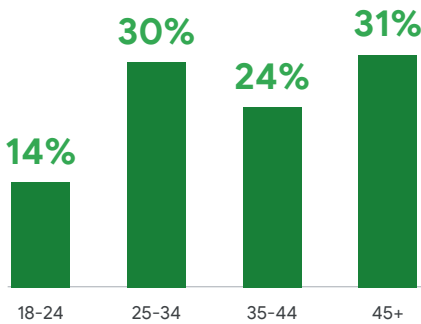
the other Asian countries covered here, a testament to the country's role as an innovator in the early days of the (arcade) games market. Japan's gamers were already remarkably engaged with games before 2020, especially on mobile, explaining why Japan's 2020 engagement rates are more

akin to Western markets than the high-growth Eastern ones. Nevertheless, Japan's engagement growth is strong across all segments, which will continue to grow into and beyond 2021. Japan has always been a games market abundant with opportunities, and this will remain the case.

Gamer demographics

Japan profile

Male **54%** Female **46%** Age (average) **37.6**

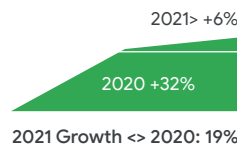


- 4%** New players since 2020 (base:47)
- 12%** Returning players since 2020 (base:131)
- 83%** Played before 2020 (base:882)
- 16.9h** Average played hours per week

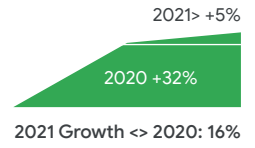
Engagement KPIs

Charts show players who report/expect to play more MINUS players who report/expect to play less

Mobile



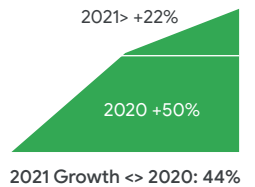
Console



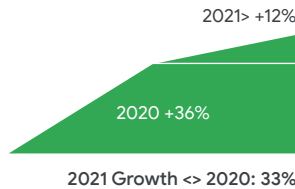
PC



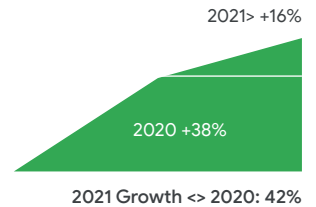
Cloud



Watching streamers



Watching esports



Definitions

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South Korea

With its globally renowned internet speeds and promisingly engaged cloud gamers, South Korea's cloud gaming market seems poised for success.

South Korea is the only Asian market indicating a net decrease for mobile engagement in 2021 (+46% from 2020 and -7% for 2021) and for PC engagement (+31% from 2020 and -5% for 2021 and beyond). However, console will see marginal growth into

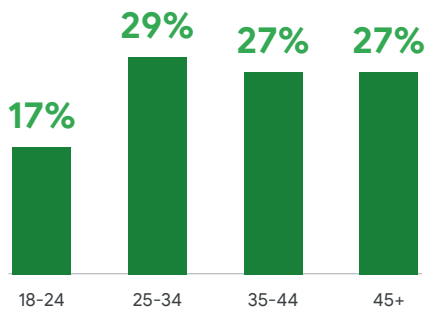
2021 and beyond, representing some stickiness for the segment. South Korea's internet speed and infrastructure are among the best in the world, so it is perhaps unsurprising that cloud saw engagement growth of +50% from the start of 2020 and +23%

into and beyond 2021. Meanwhile, streaming engagement will grow moderately into 2021 and beyond, and esports—which has long faced challenges in the market due to now-amended regulations—will only see marginal future growth (+1%).

Gamer demographics

South Korea profile

Male **56%** Female **44%** Age (average) **36.8**



5% New players since 2020 (base:48)

17% Returning players since 2020 (base:174)

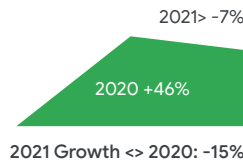
79% Played before 2020 (base:821)

14.8h Average played hours per week

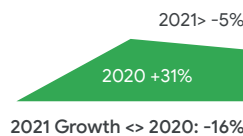
Engagement KPIs

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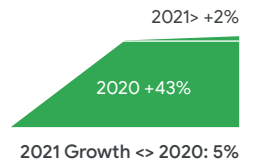
Mobile



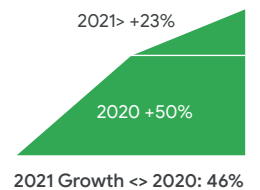
PC



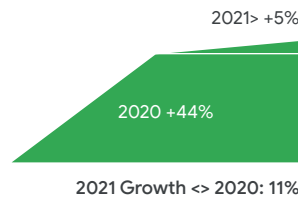
Console



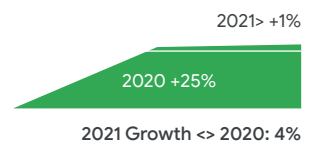
Cloud



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Taiwan

Engagement KPIs were up across the board from 2020 for Taiwan’s gamers. Engagement will likely stick somewhat, but cloud and viewership are especially encouraging.

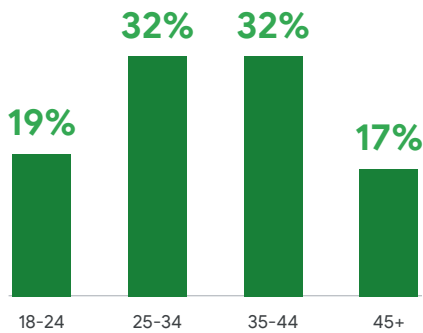
Gamers in the Taiwanese market skew male (55%) and are on the younger side (average age of 34.1). The three major playing segments—mobile, console, and PC—saw healthy engagement growth from 2020, and modest growth into and beyond 2021 (+4%

for all three). The cloud segment saw more significant growth, both from 2020 (+39%) and into 2021 and beyond (+22%). Cloud’s stronger performance here is partially driven by local network partnerships in the market (including a collaboration between Chunghwa Telecom

and Gamestream). Viewing engagement KPIs are also positive in Taiwan. Esports saw +32% engagement growth from 2020, showing stickiness and further growth in 2021 and beyond (+21%). Engagement with game-related streams follows a similar trajectory.

Gamer demographics Taiwan profile

Male 55% Female 45% Age (average) 34.1



9% New players since 2020 (base:97)

14% Returning players since 2020 (base:145)

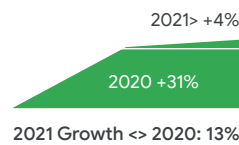
77% Played before 2020 (base:817)

12.4h Average played hours per week

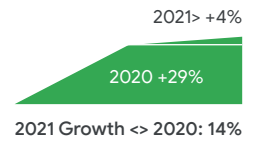
Engagement KPIs

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Mobile



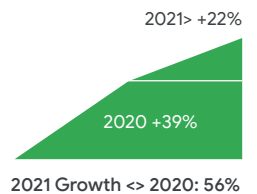
Console



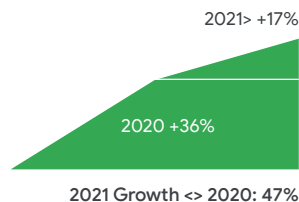
PC



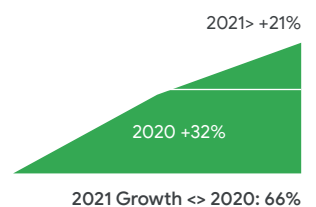
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Vietnam

Vietnam has seen increased engagement from 2020 and into 2021 and beyond. The majority of respondents are aged 19-35, signaling branding opportunities among young professionals.

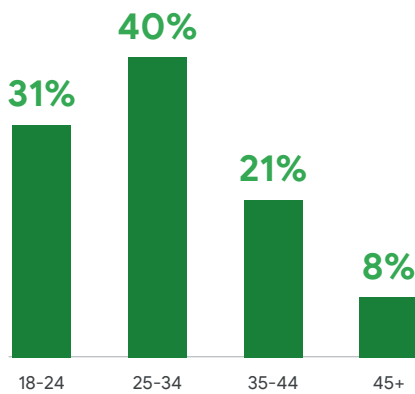
Vietnam's gamers skew very young. The average age of respondents is 30.1 years old, with just over 70% falling into the 18-35 group, making the country a viable choice for brands looking to target young professionals. However, the

country also has the lowest share of gamers over the age of 45 (just 8%), meaning there are fewer opportunities among older groups. Vietnam is a growth market, and all segments—playing and viewing alike—saw healthy engagement

growth since the beginning of 2020. PC's growth is slower than other segments. One possibility here is that some PC engagement growth was offset by the closure of cybercafes (which some PC gamers in Vietnam frequented).

Gamer demographics Vietnam profile

Male **52%** Female **48%** Age (average) **30.1**



9% New players since 2020 (base:92)

18% Returning players since 2020 (base:193)

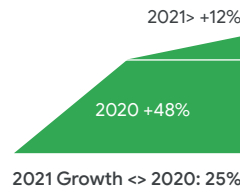
73% Played before 2020 (base:777)

13.4h Average played hours per week

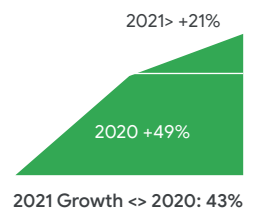
Engagement KPIs

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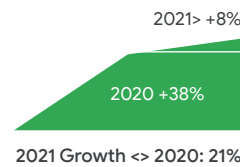
Mobile



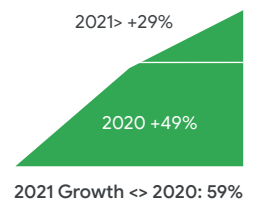
Console



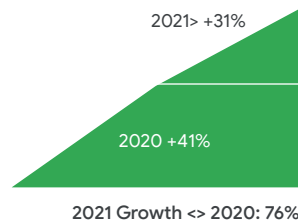
PC



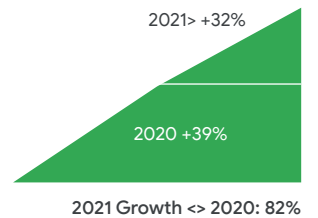
Cloud



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Methodology

This is a research commissioned by Google to Newzoo. It is based on Newzoo's games market sizing and forecast. At the highest level, Newzoo focuses on three key metrics for every market: players, paying gamers, and revenues AKA consumer spending. Newzoo defines a market as a country or geographic region in combination with one or more game segment(s), e.g. PC, console, or mobile. The data on players and payers is mainly based on Newzoo's proprietary consumer research survey, which runs annually between January and April in 33 markets. Revenue data comes from Newzoo's predictive games market model, which uses a top-down approach to market sizing. Newzoo incorporates macroeconomic and census data from the IMF and UN,

such as household income and GDP per capita, transactional and app store revenue data from Newzoo's data partners, primary consumer research, partner data, detailed financial information reported by more than 100 public companies, and third-party research. Newzoo also receives valuable input from clients, often leading international game companies.

The results presented in this report were sourced via an online survey, designed and conducted by Newzoo in April and May 2021 among 6,415 respondents from Asia-Pacific in mainland China, Japan, South Korea, Vietnam, Taiwan, and India. Quotas were set to ensure a nationally representative sample of gamers from each market. Respondents were 18 to 65 years old and were current players of video games (any platform) at the time of the survey.

