



FOR IMMEDIATE RELEASE:

**SOUTHEAST ASIAN PC ONLINE AND MOBILE GAMES REVENUE  
PROJECTED TO REACH \$3.3 BILLION BY 2020**

*Mobile game usage and revenue to overtake PC online games by 2018*

**SAN JOSE, Calif. – November 3, 2016** – According to a new market research study on the Southeast Asian countries of Indonesia, Malaysia, the Philippines, Singapore, Thailand and Vietnam, the region will enjoy strong growth in digital gamers and games revenue in the next 5 years, to exceed \$3 billion dollars by 2020. The analysis is by Niko Partners, the Leader in Asian Games Market Intelligence™, who today announced the availability of their *2016 Southeast Asian Games Market Report with Forecast through 2020*.

Key takeaways from the 124-slide report include:

- Southeast Asia (SEA) games revenue (PC online and mobile) will grow to more than \$3 billion dollars by 2020
- SEA mobile games revenue will rise by a CAGR of 25% from \$587 million in 2015 to \$1.8 billion in 2020
- Mobile game usage and revenue will overtake PC online games by 2018 due to the lower cost of mobile games
- More gamers in Thailand are “hardcore”, playing more than 21 hours per week, than in any of the other countries.
- The ITV countries (Indonesia, Thailand and Vietnam) are the three to watch for the highest revenue and growth.



- The ratio of client-based Massively Multiplayer Online Role-Playing Games (MMORPGs) to non-RPGs, which include battle arena, shooter, racing, sports and other MMO genres, is falling sharply. In 2016 MMORPGs make up merely 20% of the PC online games by revenue.
- SEA represents 6.5% of Valve's global Steam gamers, who primarily are playing Dota 2. Countries with lower demand for Dota 2 happen to have higher than average demand for Riot's League of Legends, operated by Garena in the region.
- Very popular international games in SEA include Hearthstone, Overwatch, Pokémon Go, Supercell games, Dota2, League of Legends, FIFA OL 3, and many more.

"The primary driver of demand for PC online games in SEA is eSports, and the primary driver of demand for mobile games is the appetite for a wide selection of lower cost digital entertainment," said Lisa Cosmas Hanson, managing partner of Niko Partners. "Gamers in many of the Southeast Asian countries that we track are restricted by lower disposable income, and that makes local parity pricing important for foreign game developers to acquire greater numbers of users who can afford to play their games, hence ultimately generating higher overall revenue."

Niko's methodology included an online survey of 1,500 gamers, interviews with executives at major Southeast Asian online games companies, payment companies, mobile game developers, and profiles of three gamers in Thailand, Vietnam and even Myanmar. The report provides market share estimates for online game operators in each country, and a list of their leading games. The analysis includes a comprehensive market model and 5-year forecast by country



and games segment, and qualitative and quantitative analysis on gamer demand, behavior, and usage for PC online and mobile games at home and in I-café's.

The data-intensive 124-slide report with 144 exhibits is available now for \$7,500 (US) and comes with Niko's August 2016 Southeast Asian eSports Bulletin (16 pages, 10 exhibits) for FREE. The topic of eSports was contained in that bulletin rather than in the report. For more information and to purchase visit [www.nikopartners.com/researchstore](http://www.nikopartners.com/researchstore) or email [sales@nikopartners.com](mailto:sales@nikopartners.com).

#### ABOUT NIKO PARTNERS

Niko Partners is the leader in Asian Games Market Intelligence™, specializing in the Chinese and Southeast Asian game markets. Founded in 2002 and in its 13th year of detailed analysis on the Chinese market, the firm conducts syndicated and custom research studies on Chinese gamers, Southeast Asian gamers, online games, mobile games, consoles, Smart TV gaming, regulatory issues, piracy, development, online operators, distribution, and retail. Niko Partners also offers consulting services including focus groups, partnership selection, market opportunity analysis, custom surveys in cities throughout China and the Asia-Pacific region and customized data analysis. The goal of the research and strategic advisory services is to help understand the market, strategically enter or expand market share, and continue to profitably grow within China and Southeast Asia's impressive markets.

The company is based in Silicon Valley and Shanghai, and its clients include worldwide leaders in game software, hardware, and services, as well as hedge funds, media companies, trade associations, and management consulting firms,

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all of whom have a vested interest in a thorough understanding of the games industry in Southeast Asian and China.

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