

State of the Market: Mobile Gaming in Europe

Mobile Games Forum 2013

Hesham Al-Jehani, Product Manager Mobile Europe | 23rd January 2013

hal-jehani@comscore.com

Agenda

- comScore Intro
- Device Landscape
- Mobile Gaming Trends
- Monetisation
- Summary

Who we are and what we do?

We Provide Insights and Actions

We are an **internet technology** company that **measures** what people do as they navigate the **digital world** –

and turns that information into **insights and actions** for our clients to **maximise the value of their digital investments.**



comScore is a leading internet technology company that provides Analytics for a Digital World™



NASDAQ

SCOR



Clients

2,100+ Worldwide



Employees

1,000+



Headquarters

Reston, Virginia, USA



Global Coverage

Measurement from 172 Countries; 44 Markets Reported



Local Presence

32 Locations in 23 Countries



Big Data

Over 1.5 Trillion Digital Interactions Captured Monthly

Providing Analytics For More Than 2,100 Clients Globally

Media	Agencies	Telecom/Mobile	Financial	Retail	Travel	CPG	Health	Technology

Some of Our Largest EMEA Clients Include...

Media Owners / Advertisers / OEMs / Operators

Agencies

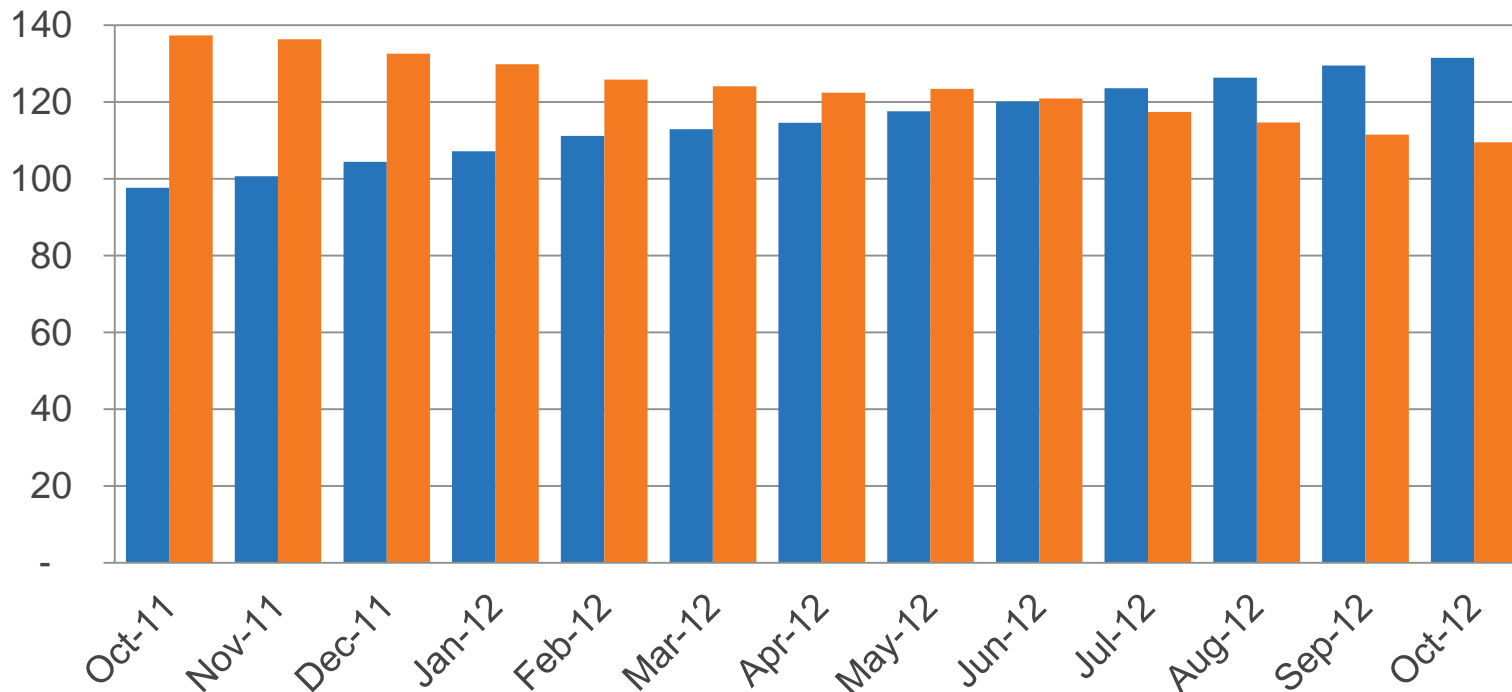


What devices are used in EU5?

55% Smartphone Penetration in EU5, Close to 132 million Smartphone Users

Growth in smartphone user base EU5
(millions)

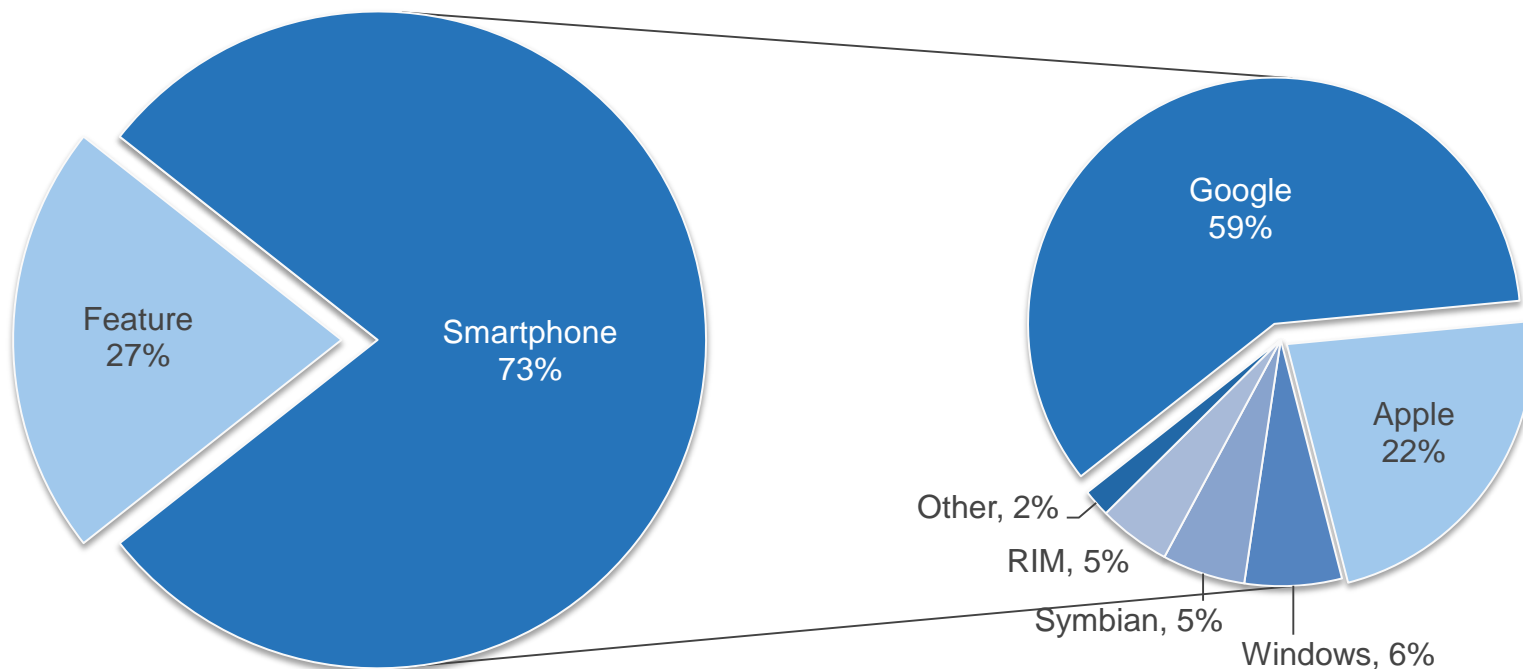
■ Smartphone ■ Feature



35%

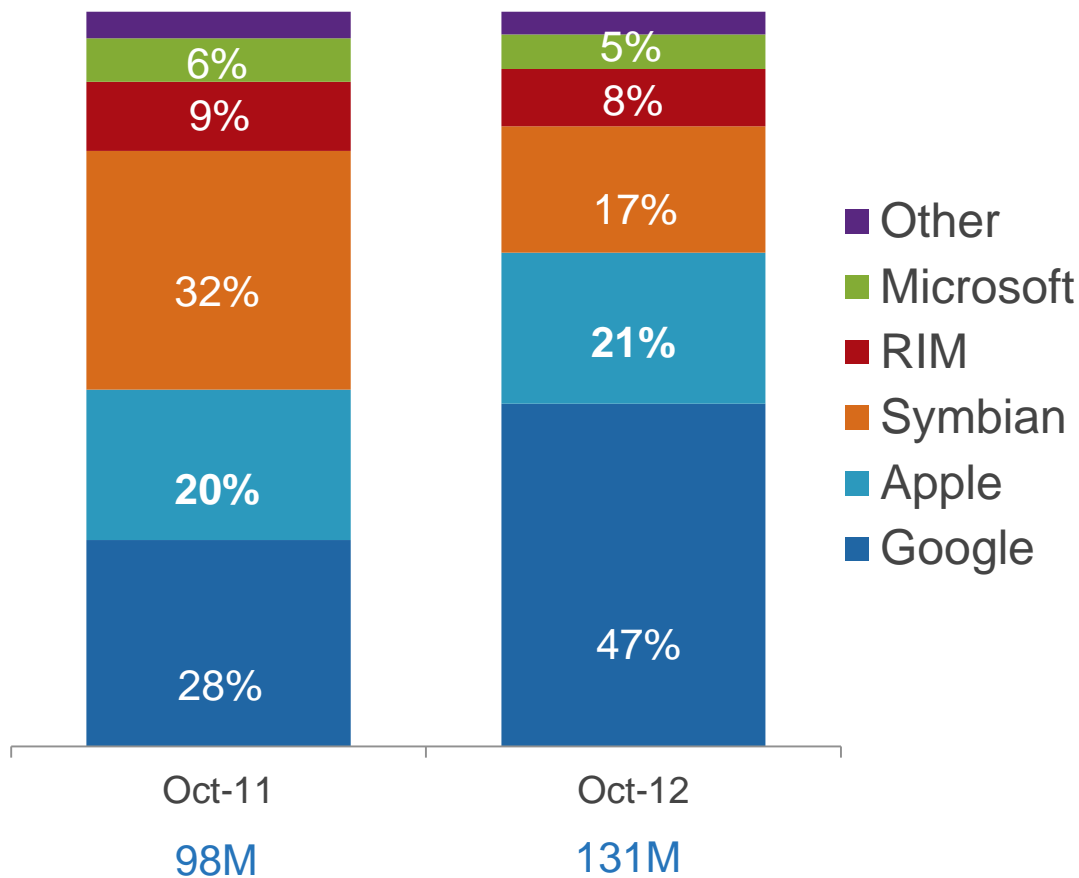
Almost Three Quarters of All New Handset Acquisitions are Smartphones



Newly acquired handsets in October 2012



Smartphone Landscape Is Dominated by Android and iOS Devices With a Combined Total of Over Two Thirds Market Share

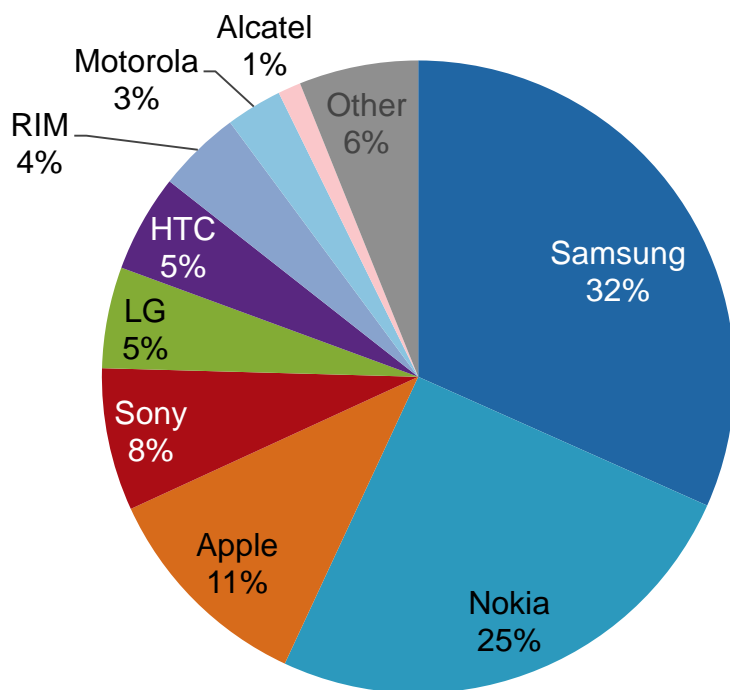
Smartphone platform market share and growth EU5



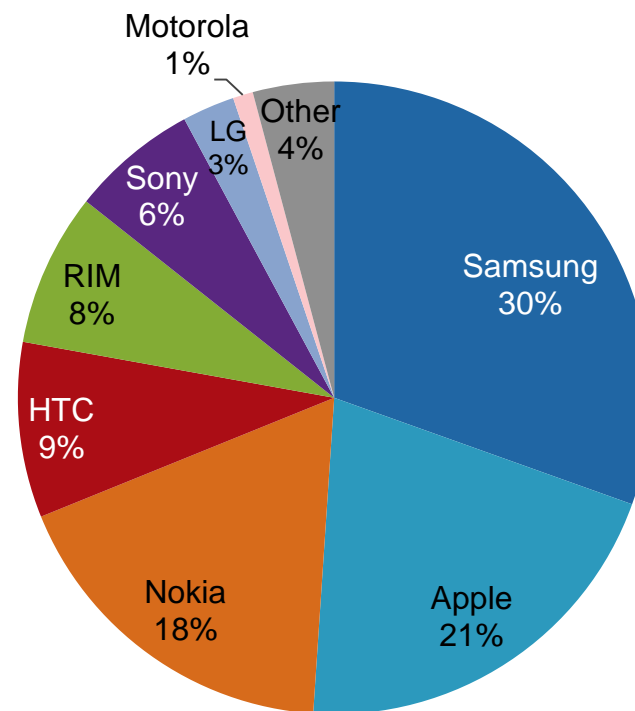
 ANDROID	 124%
	 35%
 BlackBerry	 12%
 Windows Mobile	 7%
 symbian	 -29%

Samsung The Largest OEM in EU5 Region

Device market share by OEM



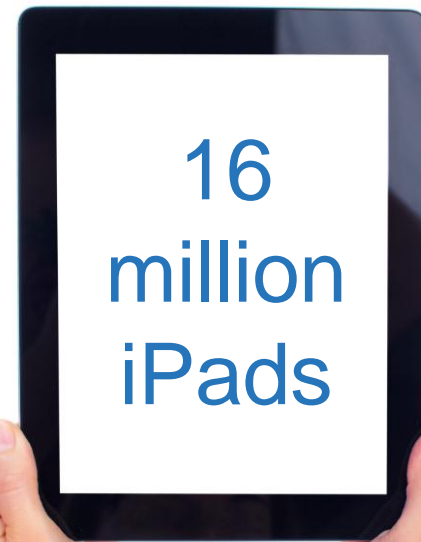
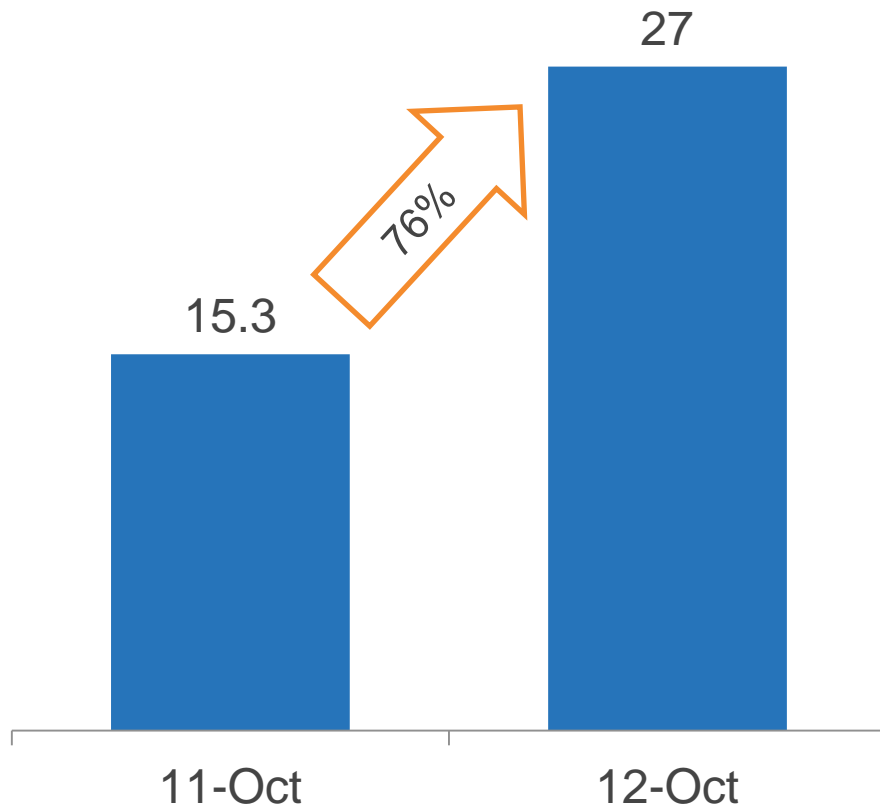
Total Base = 241 Million



Smartphone Base = 131 Million

Tablets Reaching 15% Penetration of Smartphone User Base iPads Make up 60% of the Total Tablet Market in EU5

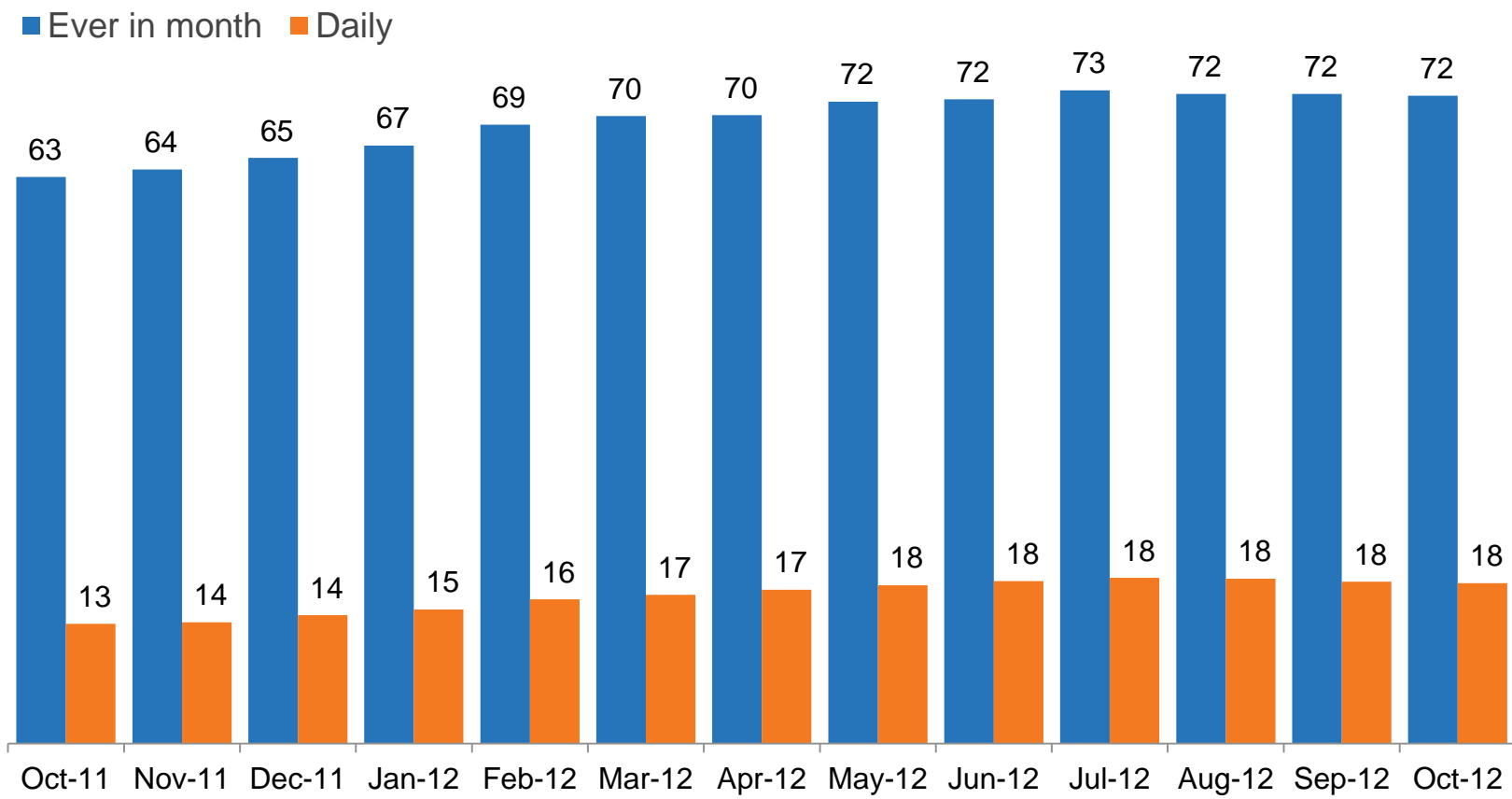
Tablet ownership among mobile users in EU5
(million)



How many mobile gamers and what are they playing?

Almost a Third (72 Million) of all EU5 Users Play Mobile Games 18 Million Play Daily

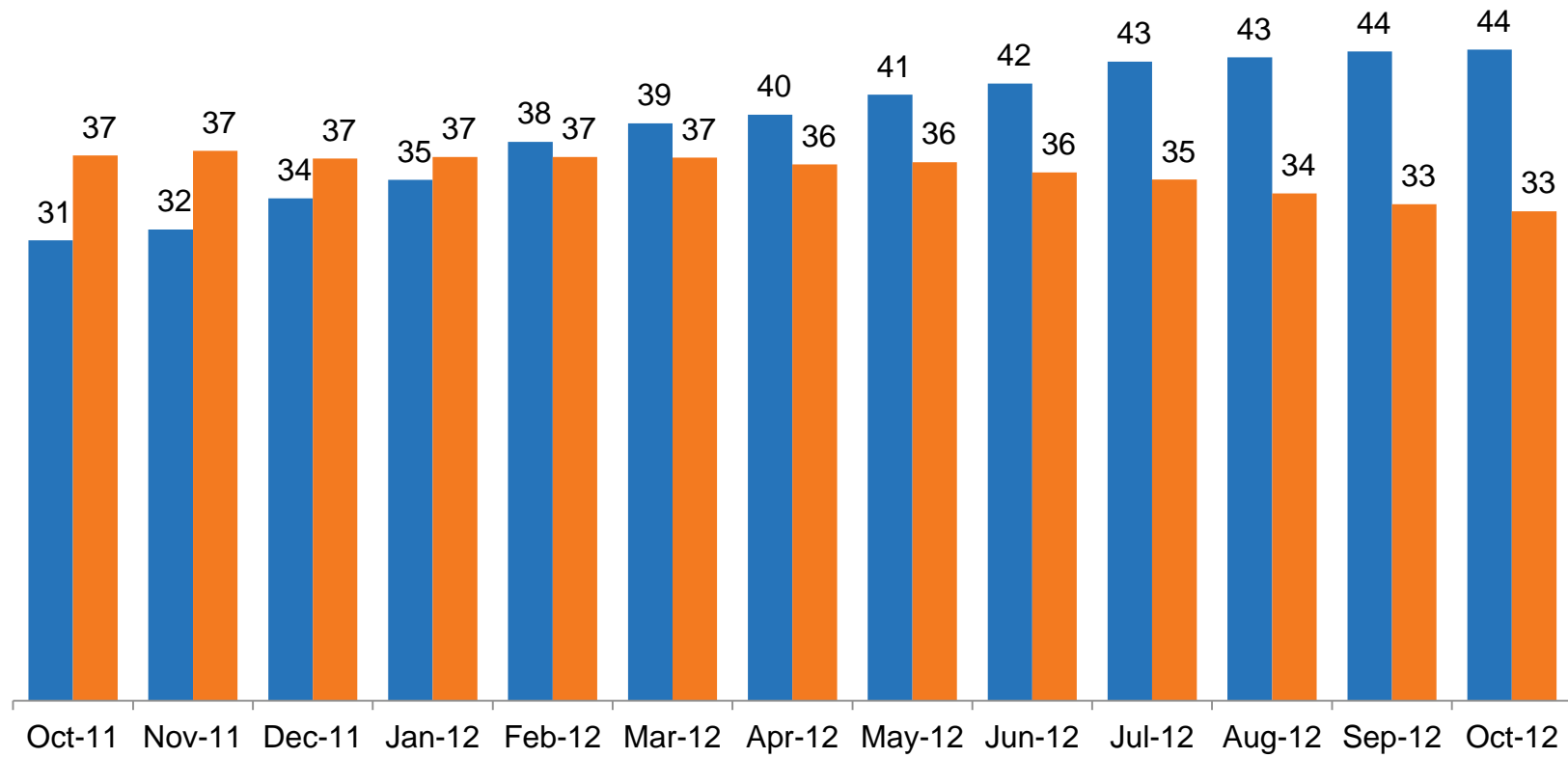
Played mobile game(s)
(millions)



Mobile Game Players Are Increasingly Playing Downloaded Games From App Stores

Downloaded V preloaded game play (millions)

■ Played downloaded games ■ Played native/preloaded games

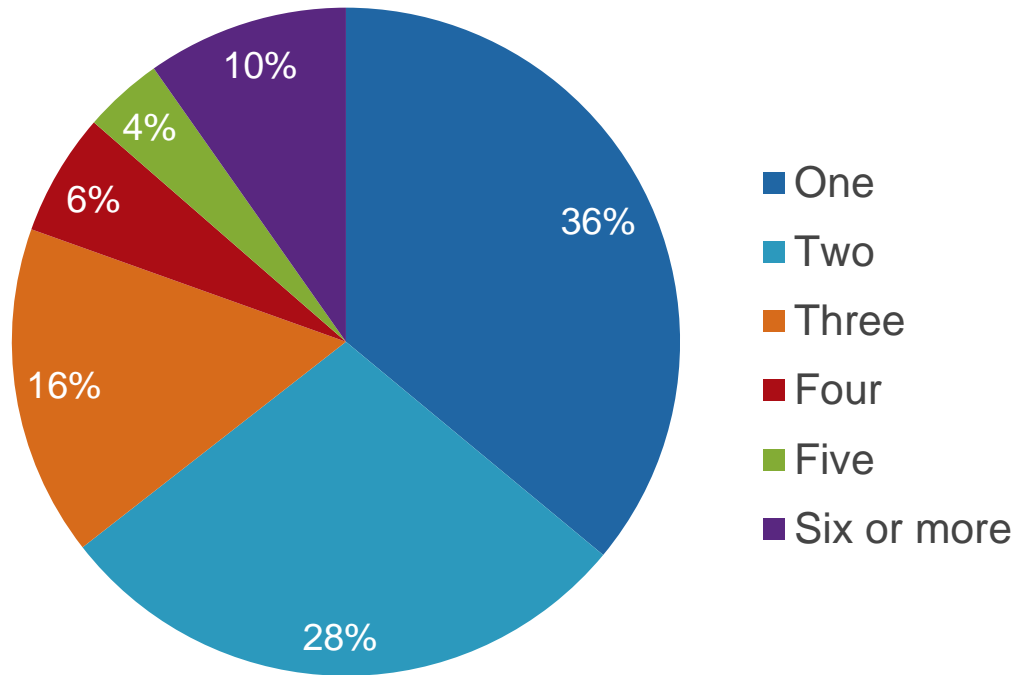


41% YoY

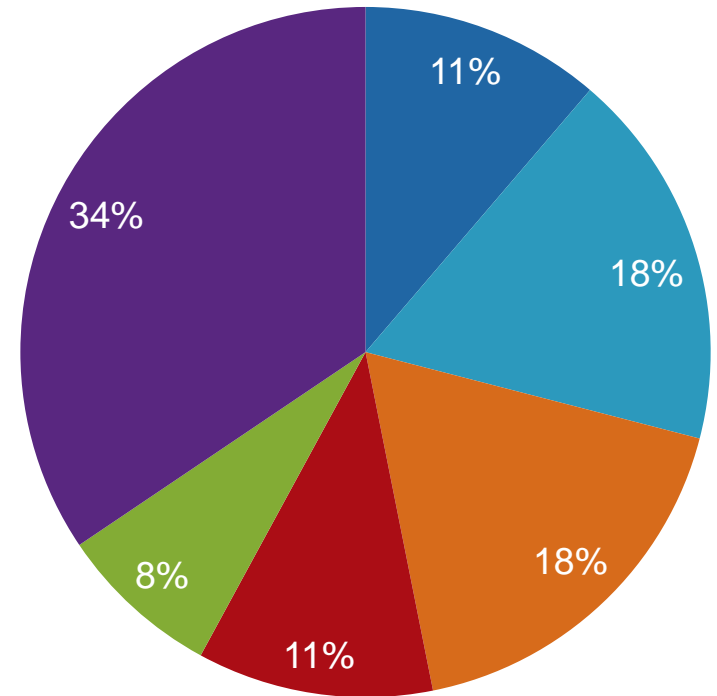
-10%

Most Consumers Download One or Two Games in a Month and Have Four or More Games Installed

Number of games downloaded in month



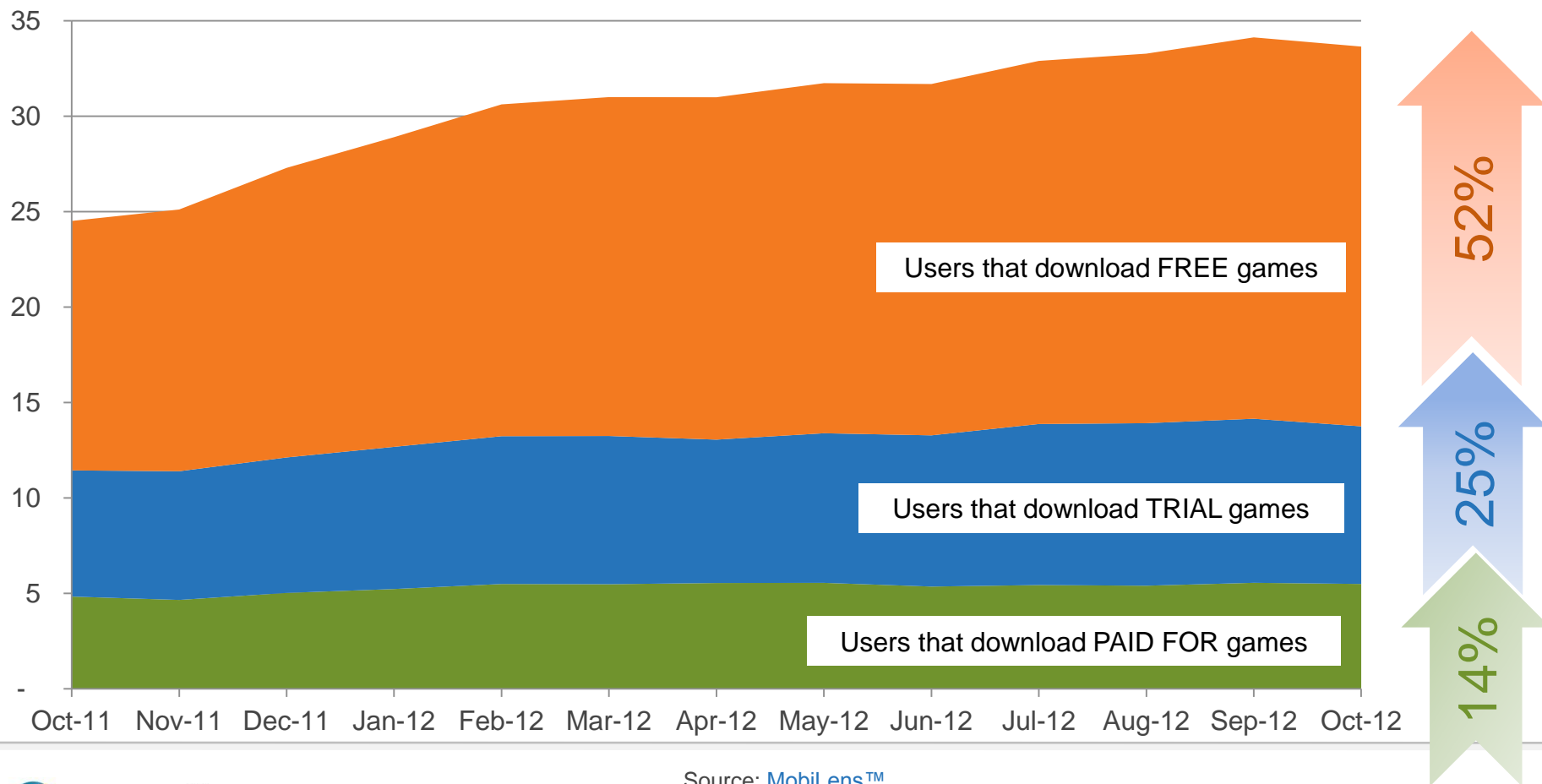
Number of games on phone



Users That Download Games Up 43% YoY to 24M

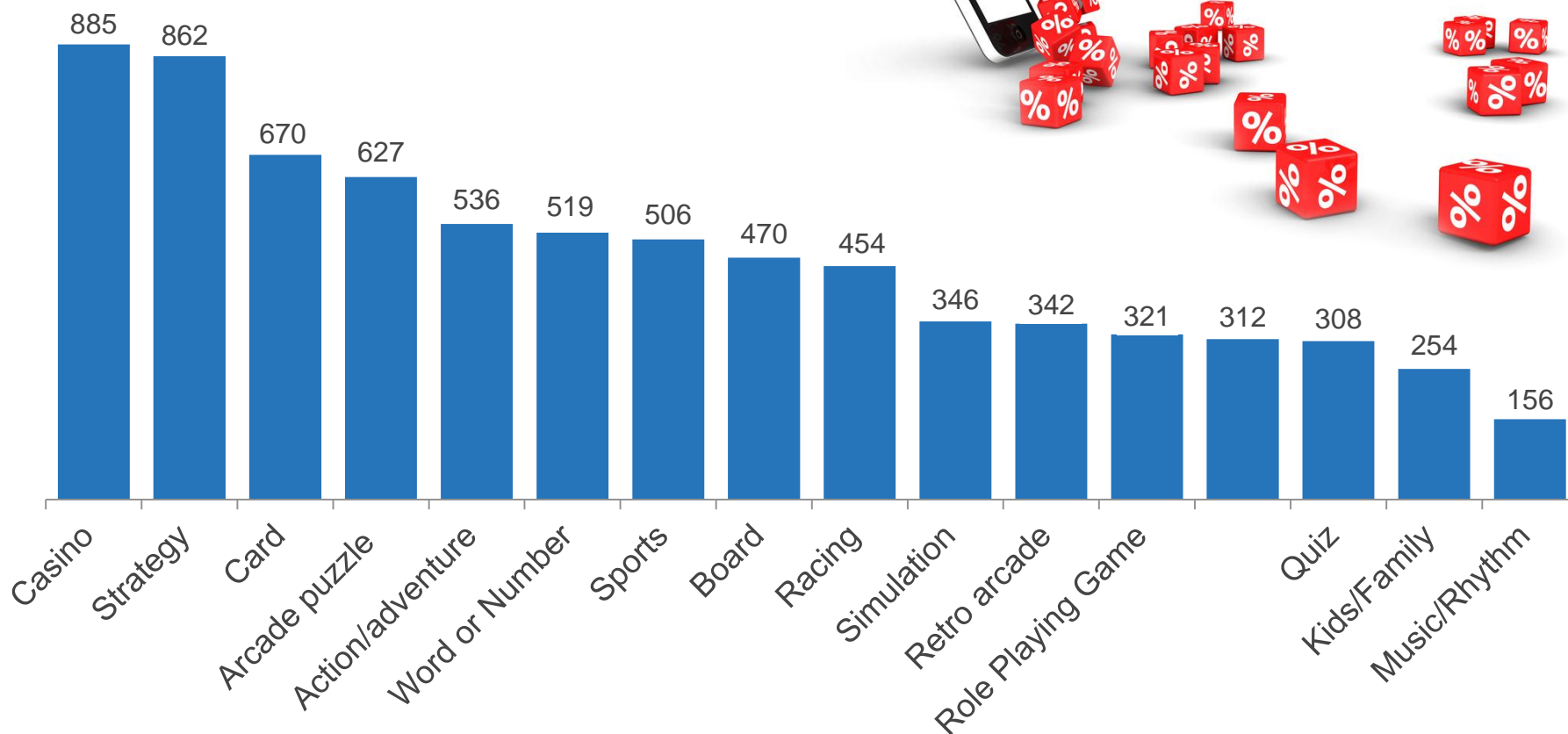
The Majority of Those (20M) Downloaded Free Games

Games downloaded in month
(millions)



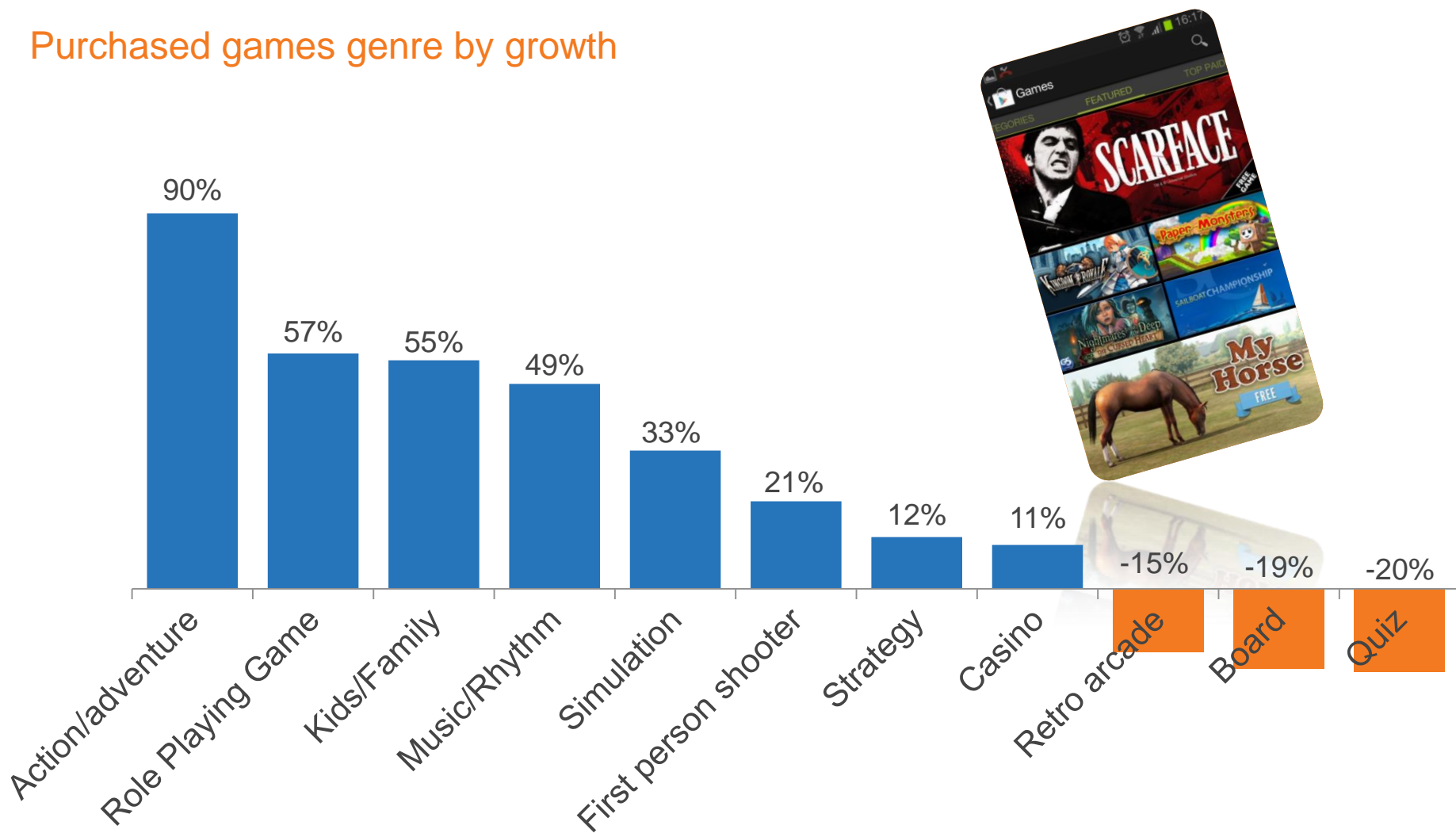
Casino, Strategy and Card Games The Three Most Popular Purchased Gaming Genres

Purchased games by genre
(000s)

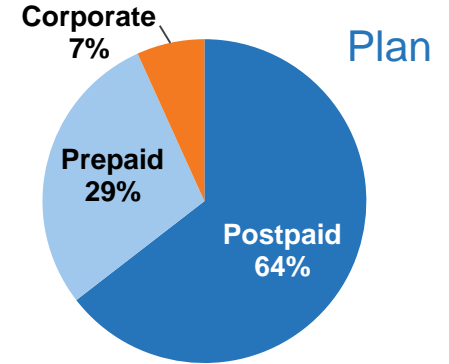
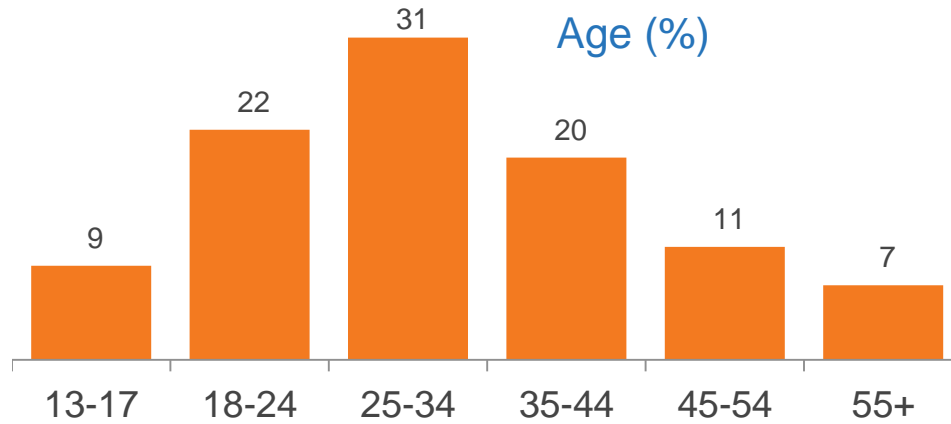
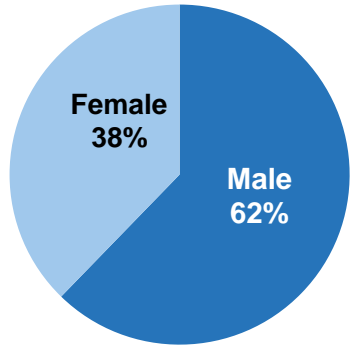


Action & Adventure Games Show the Strongest YoY Growth Whilst Retro Arcade, Board & Quiz Games Are Falling in Popularity

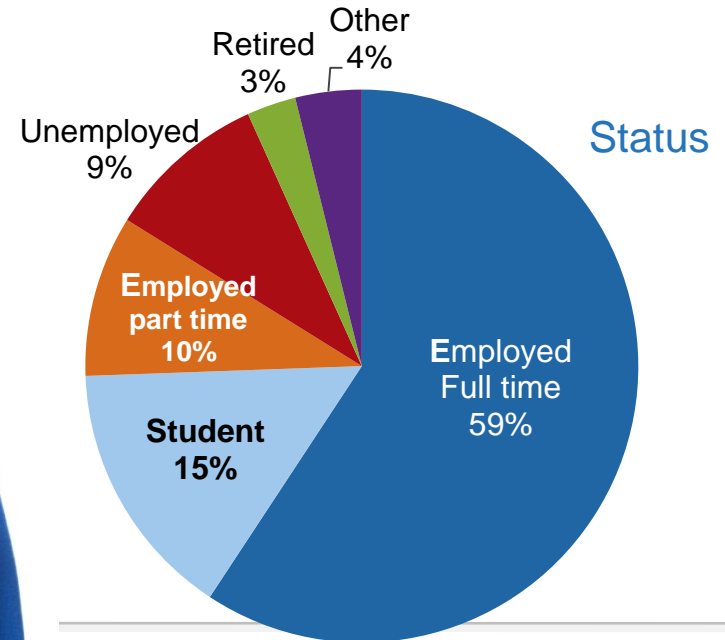
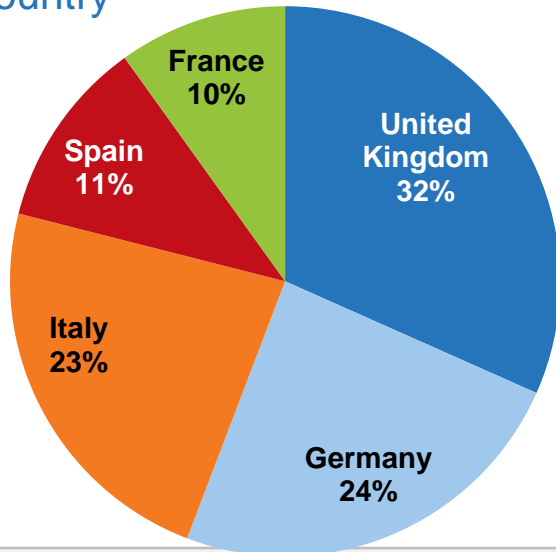
Purchased games genre by growth



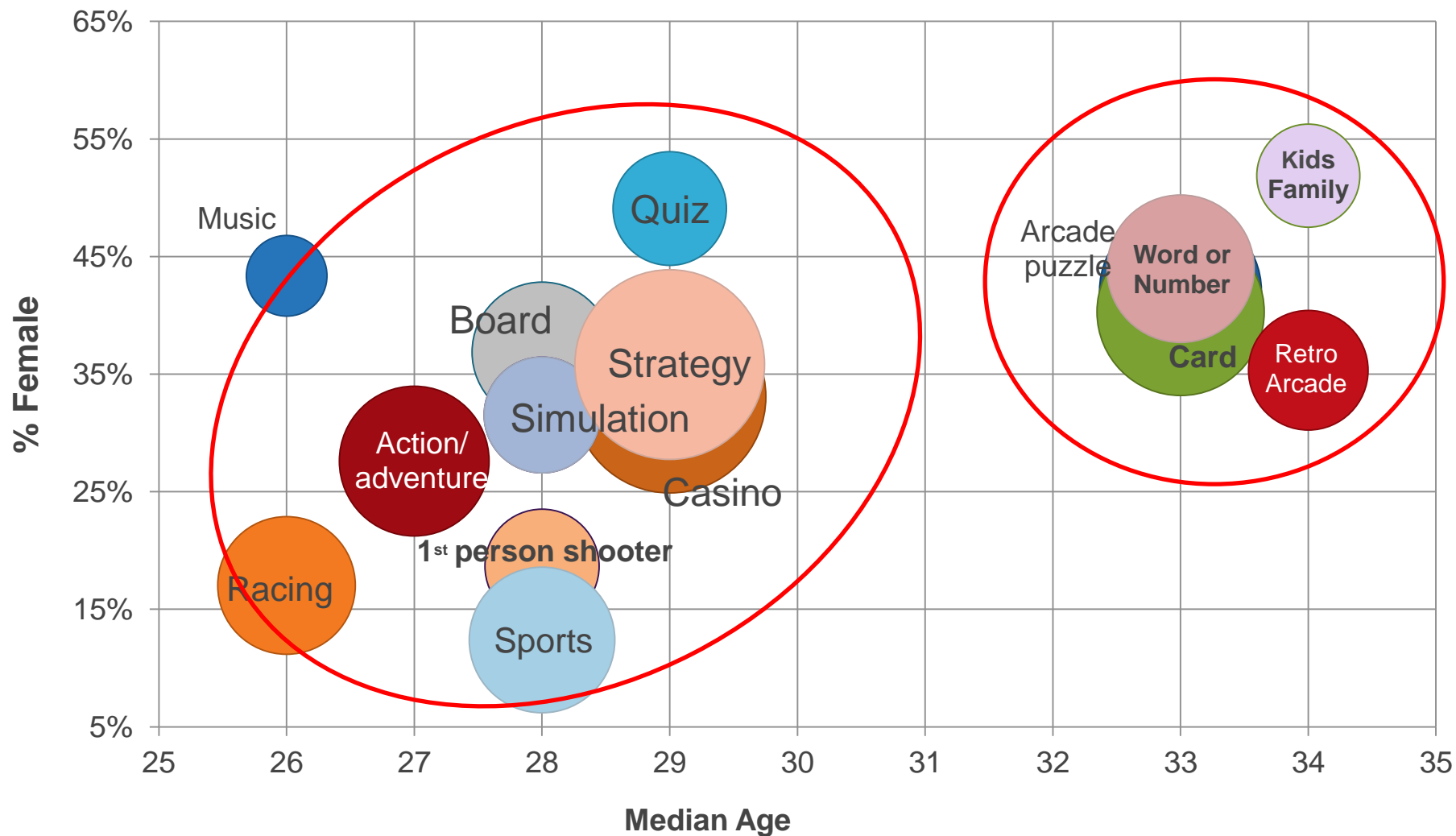
Demographic Profile of Game Purchasers Describe A Typical 25-34 Year Old Employed Male on a Post Paid Tariff in UK, DE and Italy



Country

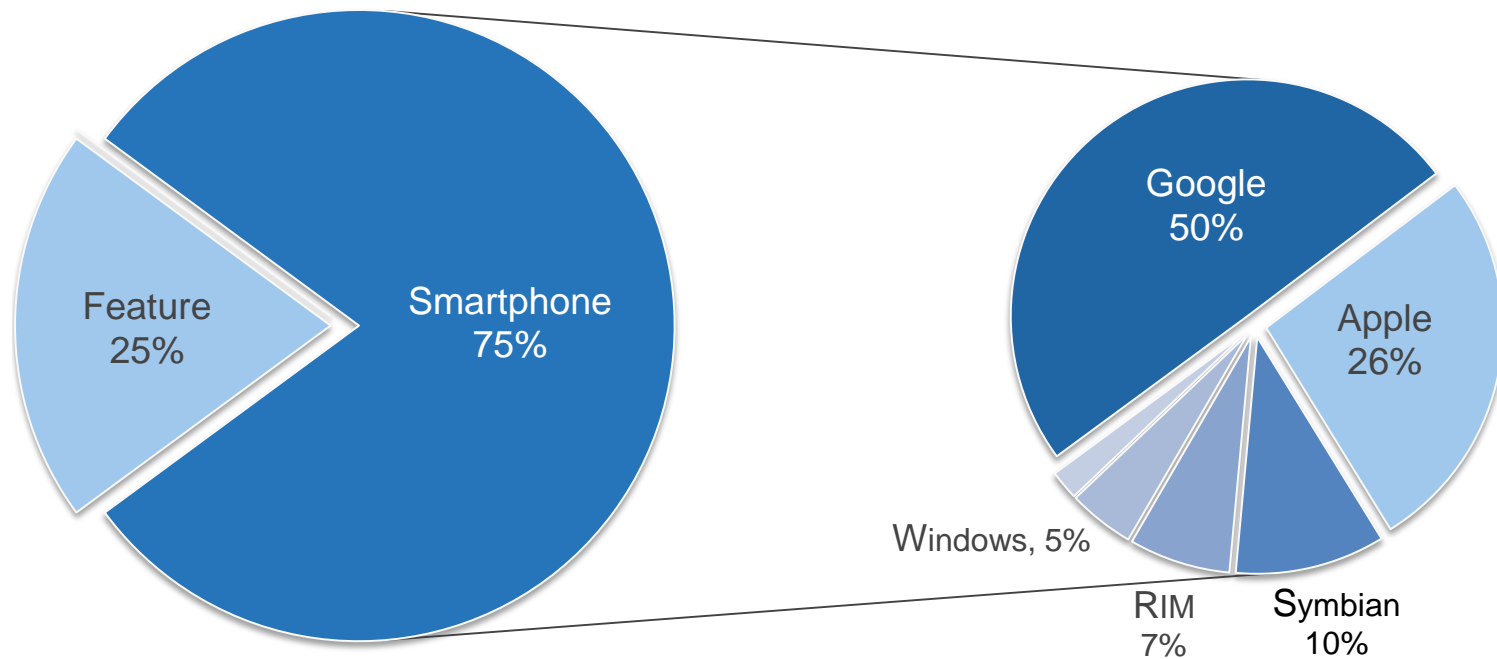


Distinct Audiences For Some Game Genres But Shifts Are Observed in Gaming Preferences Across Age and Gender Demographics



Three Quarters of Mobile Gamers Are Smartphones Owners and Half of Smartphone Gamers Use Android Devices

Platform share of mobile gamers



Top 10 Gaming Handsets Dominated by Apple and Samsung Smartphones in EU5 Region



iPhone 4
5.6M



iPhone 3G
1M



iPhone 4S
4.3M



iPhone 3GS
1M



Galaxy Ace
2.5M



BB Curve
1M



Galaxy S3
1.7M



Galaxy Mini
1M



Galaxy S
1.2M

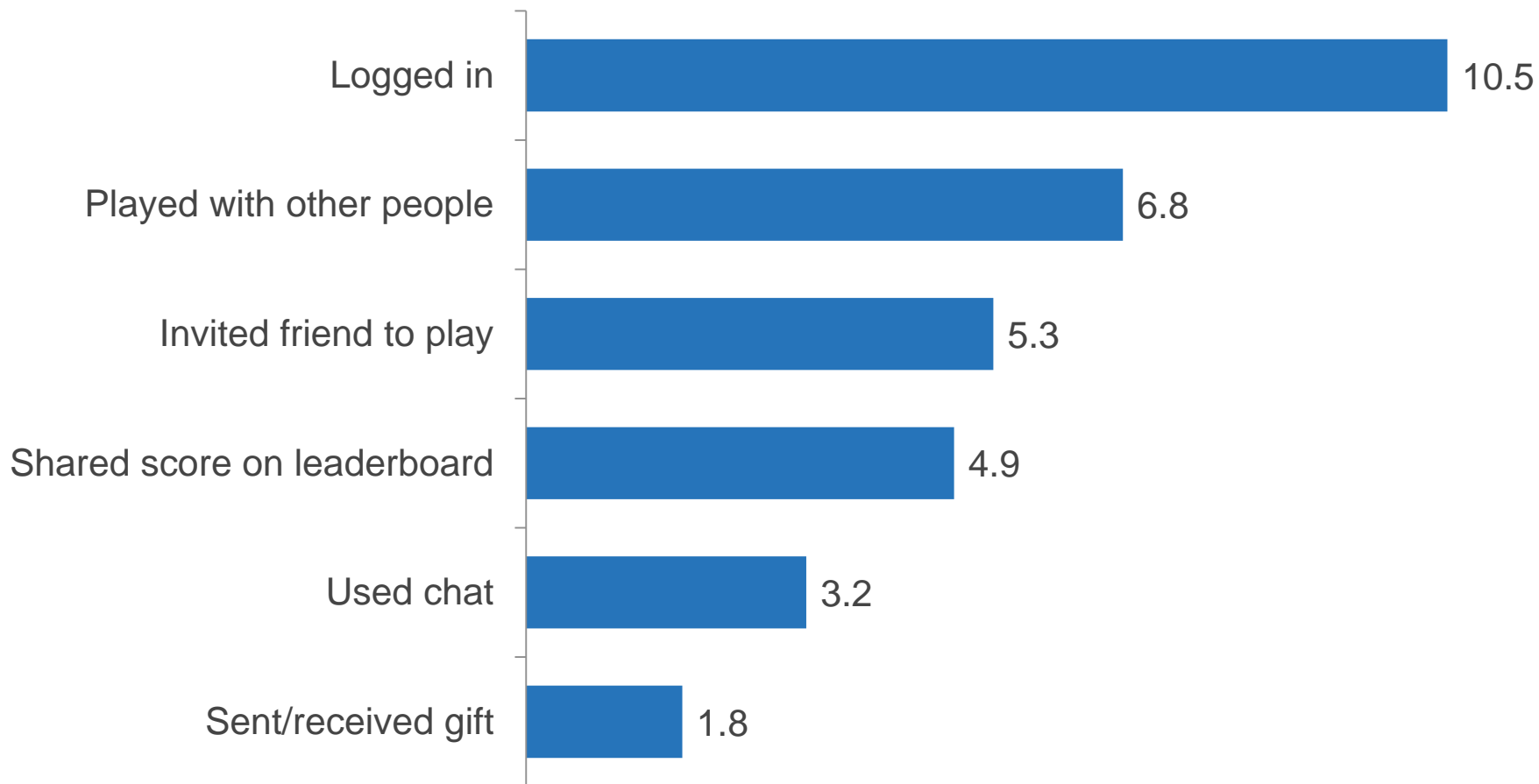


HTC Wildfire S
0.9M



Multi-Player Gaming and Sharing Scores Are The Primary Activities Within Social Gaming

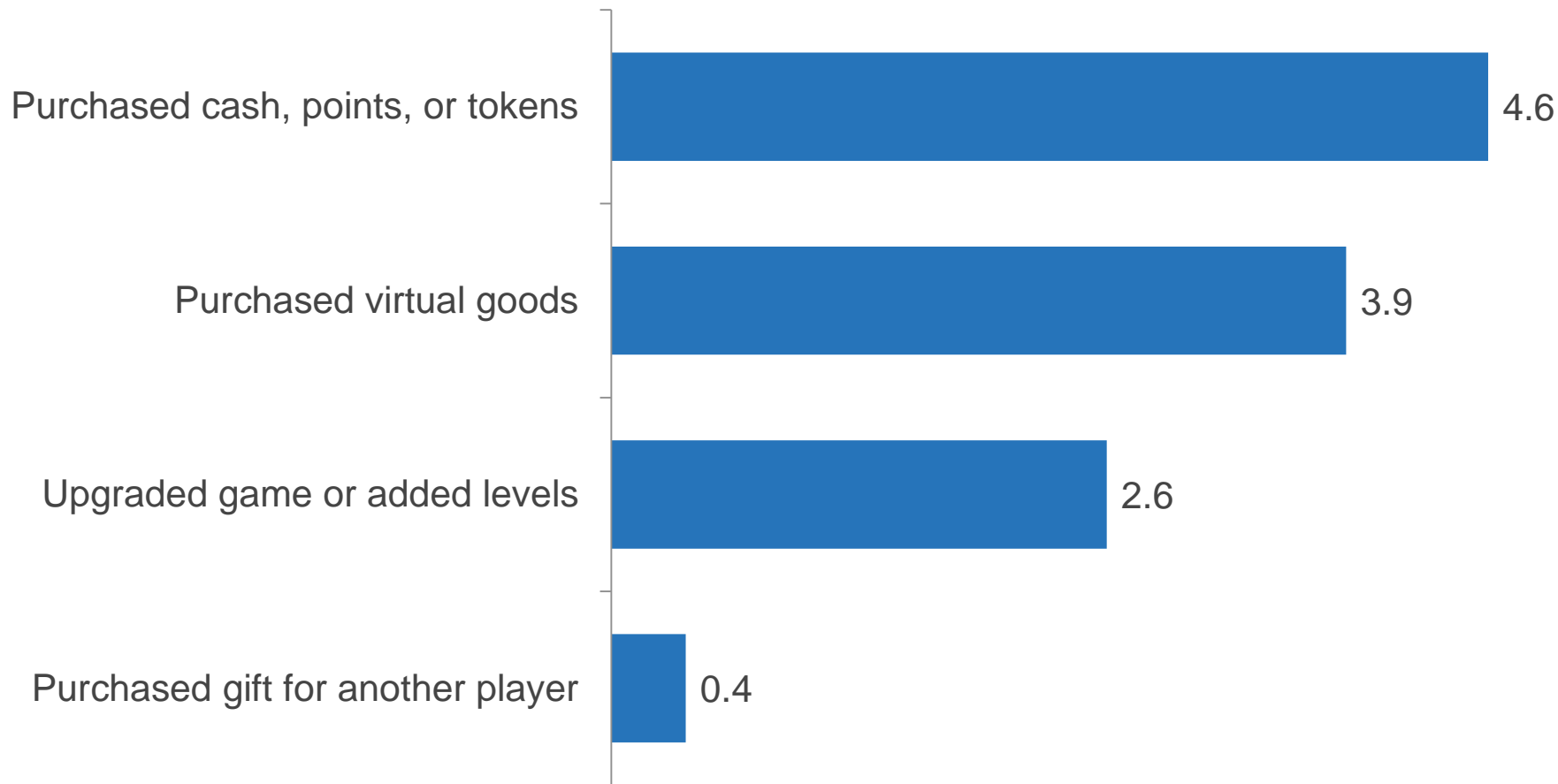
Social gaming activity
(millions)



Where is the ROI?

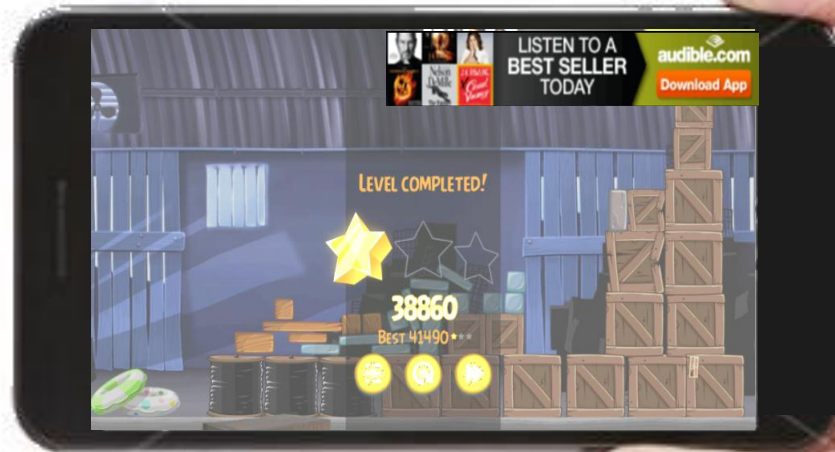
14% of Mobile Gamers Made In-Game Purchases Almost 80% of Those Were Smartphone Users

In-game purchasing
(millions)



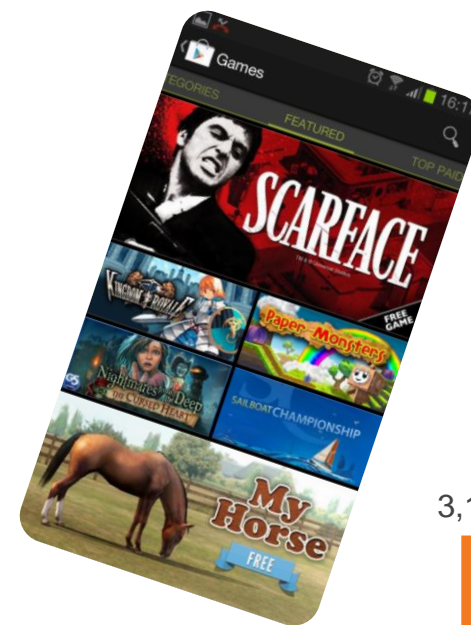
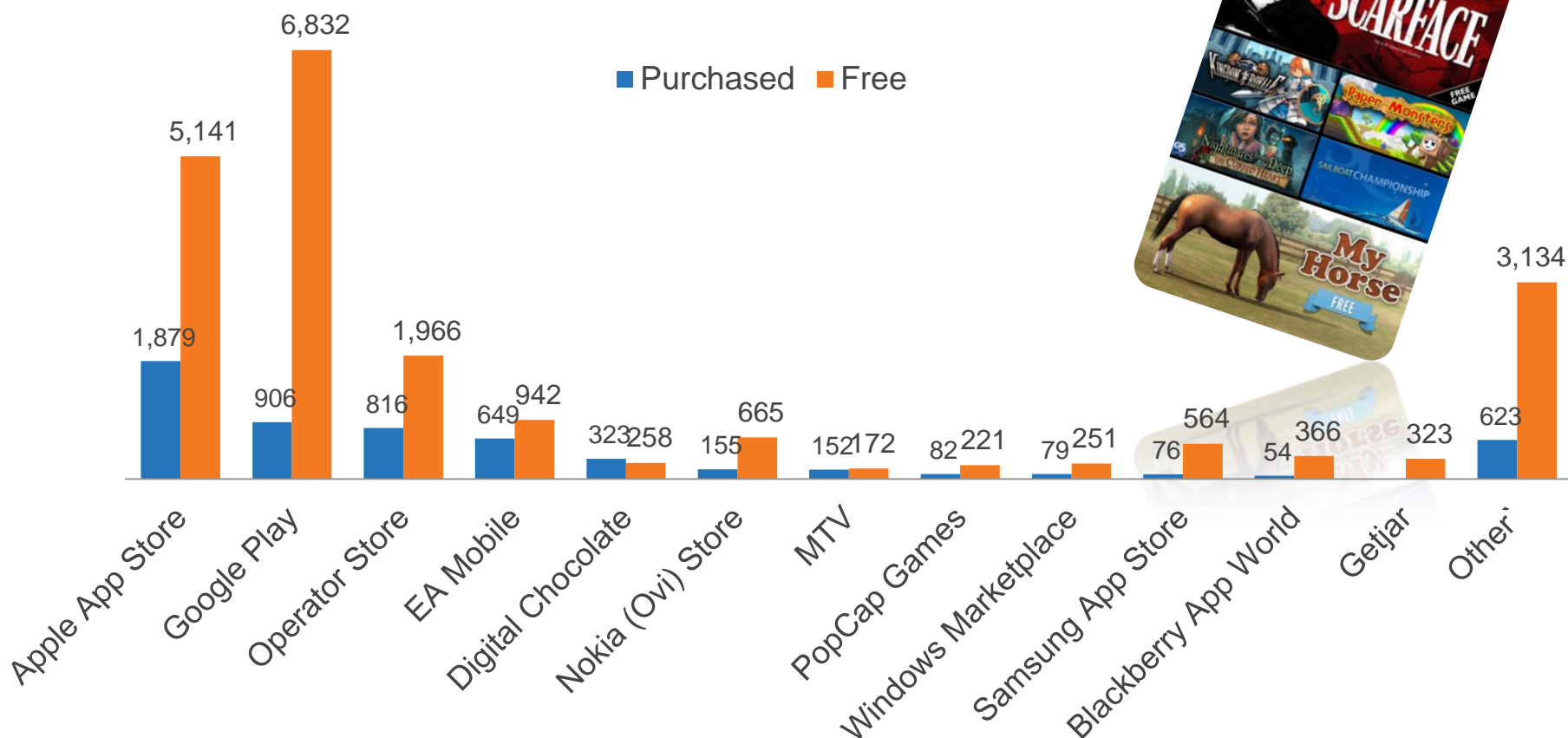
Mobile Gamers Show a Higher Propensity to Recall Seeing In-Game Adverts Than Connected Media Users

36% of Smartphone Gamers Recall Seeing In-Game Adverts



Apple App Store The Most Popular for Game Purchase Google Play the Most Popular for Free Game Downloads

Store Where Mobile Games Was Downloaded (millions)



Take Aways

Summary

- Mobile gaming continues to grow in EU5 region and uptake is driven by increasing ownership of smartphones.
- iPhone gamers display the highest propensity to play, trial and purchase games, although Android platform has the highest volume of gamers.
- Therefore, develop for Android and iOS devices to maximise audience reach for downloadable and purchased games.
- Monetisation still mainly through game purchases, in-game purchases and in-game advertising.
- Operator portals are still an important channel for mobile games downloads - free and purchased.
- There are distinct target audiences for different game genres but preferences change over time.
- For social gaming focus on the multiplayer gaming experience.

Thank you for your attention

- For more information on data source visit **MobiLens™** at comScore.com/Products/Audience_Analytics/MobiLens
- For free mobile data insights visit the comScore **Data Mine** at comScoreDatamine.com/category/mobile
- Look out for the forthcoming **Future in Focus** free White Paper at comScore.com/Insights
- Follow us on Twitter
[@comScoreEMEA](https://twitter.com/comScoreEMEA)