



App Annie

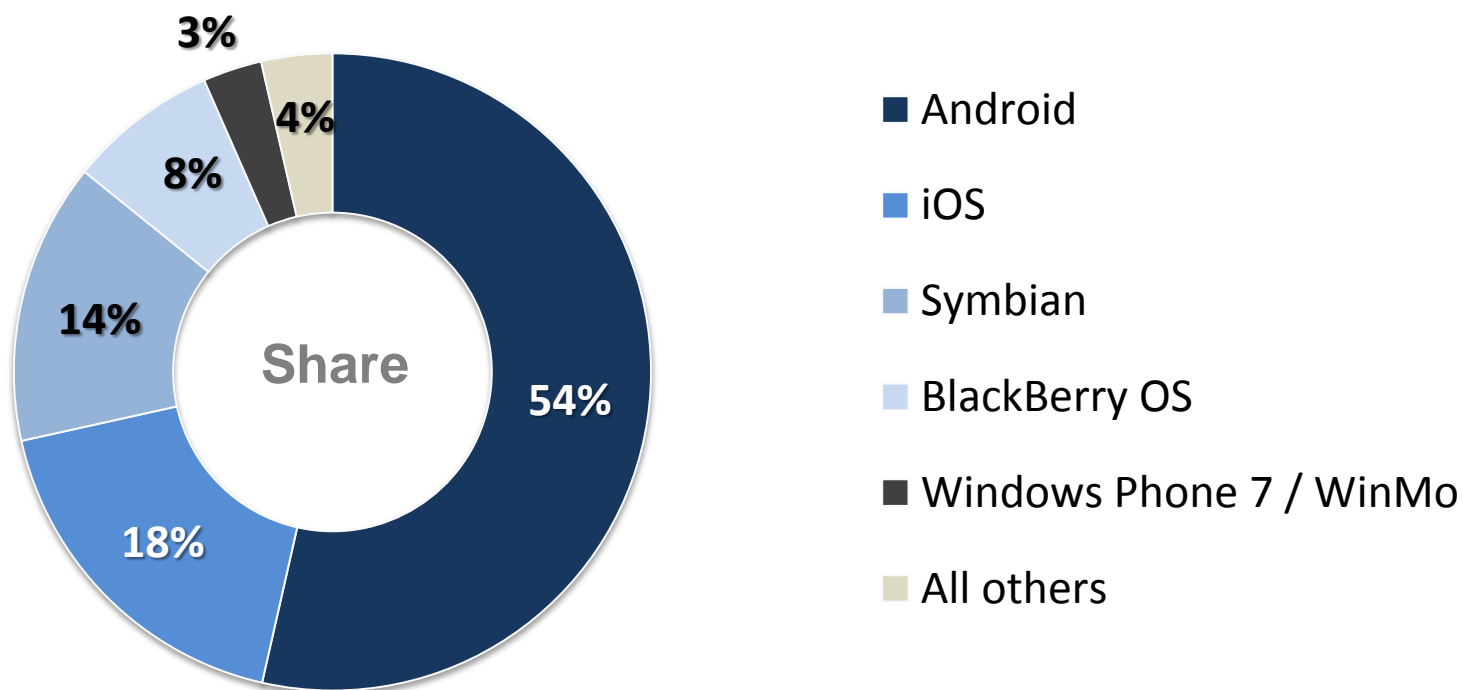
 **IDC**
Analyze the Future

Portable Gaming Report: 2012 Review & 4Q Deep Dive
App Annie & IDC
February 2013

AGENDA

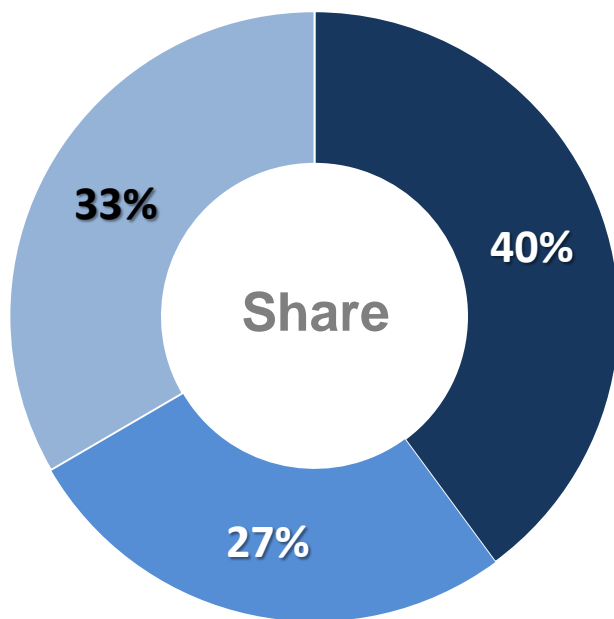
- 1 Portable Gaming 2012 Review**
- 2 4Q12 Consumer Spending Deep Dive**
- 3 Key Themes & Takeaways, 4Q12**

Worldwide Smartphone Installed Base Shares, Year-End 2012



- Android significantly outpaced iOS adoption in 2012

Worldwide Dedicated Handheld Packaged Game Shipments, 2012



Shipped Game Volume:
~120 Million

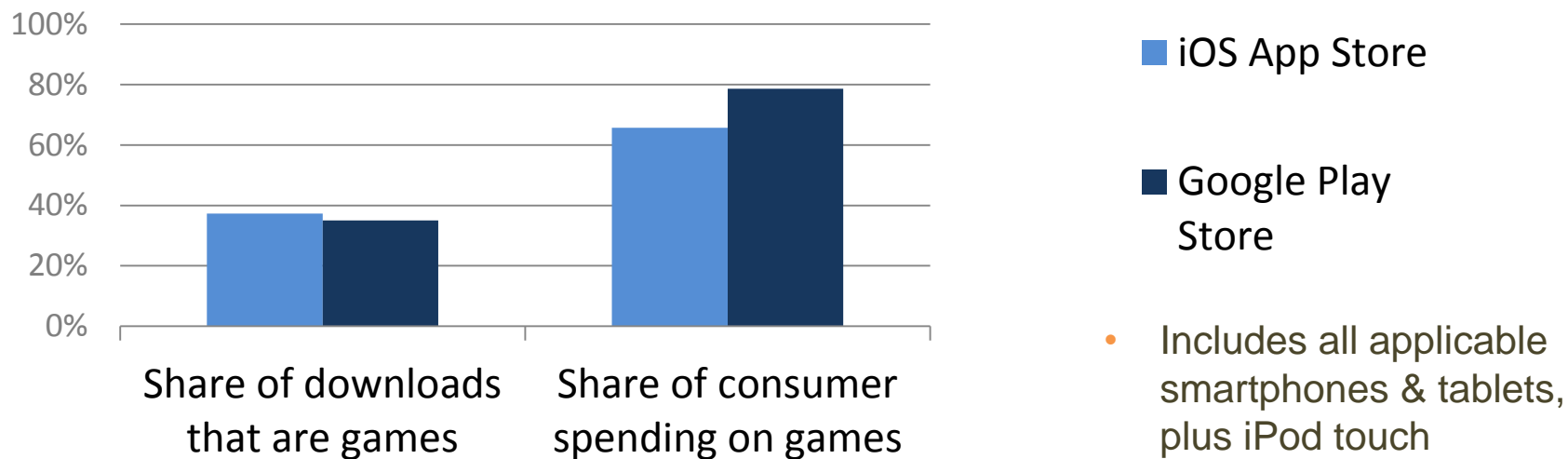
■ Nintendo 3DS

■ Sony PSP & Vita

- Hardware platforms span all SKUs
- Software excludes all digital sales

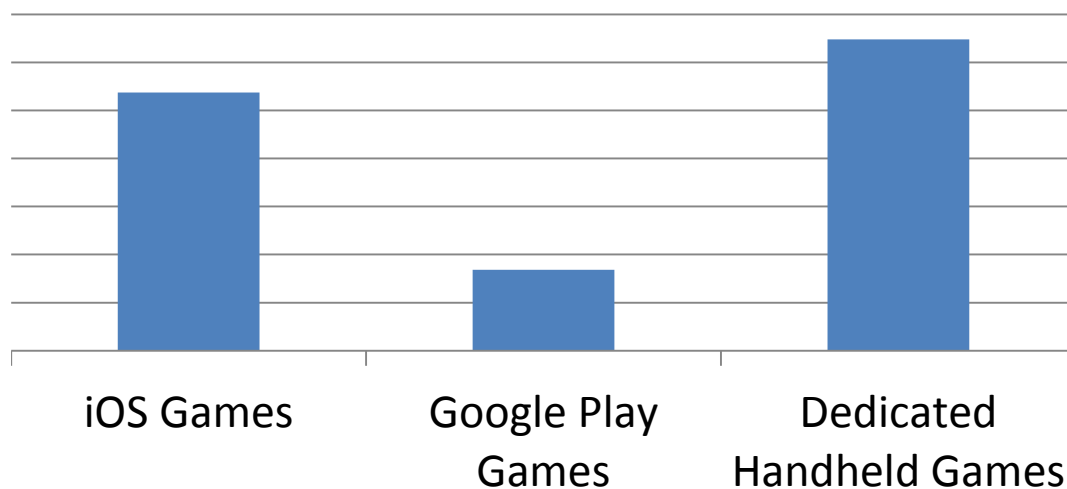
- Nintendo shipments topped Sony nearly 3:1

Worldwide iOS & Google Play Game Downloads and Consumer Spending Shares, 4Q12



- Over one-third of iOS App Store & Google Play app downloads were games; a clear majority of app spending was on games
- IDC surveys indicate that well over 20 billion games were downloaded across all smartphone & tablet platforms in 2012

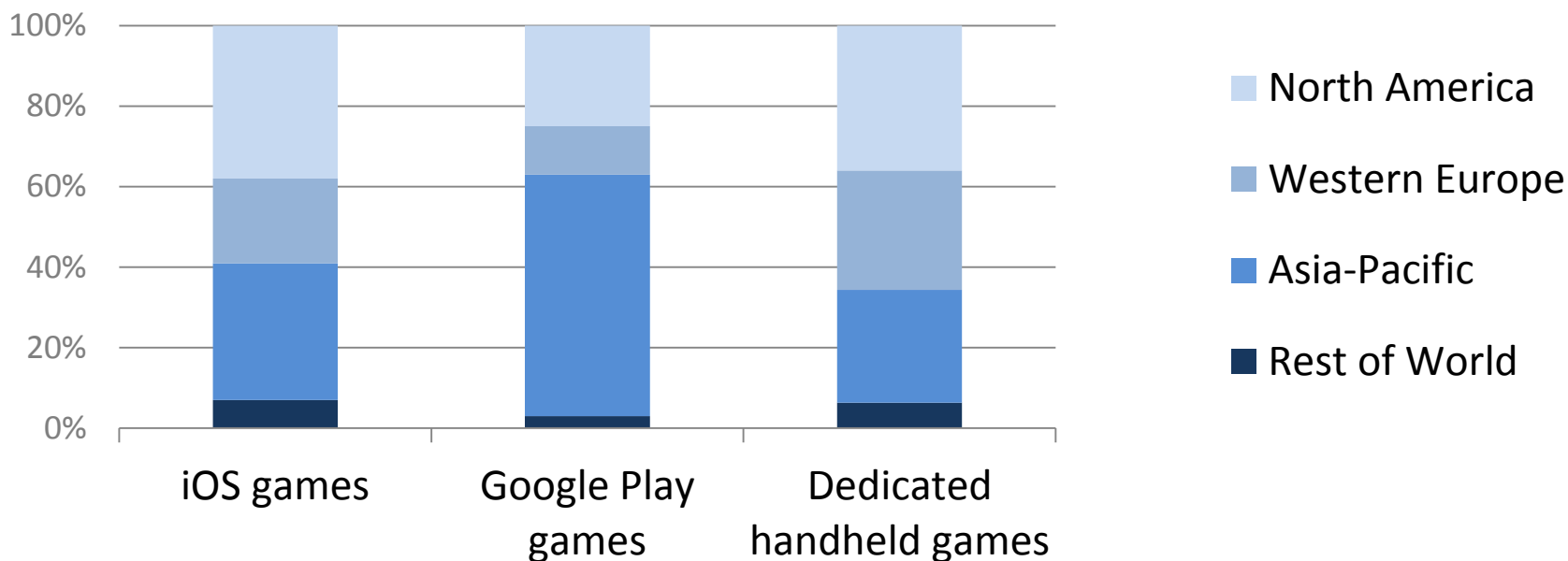
Worldwide Portable Game Consumer Spending, 4Q12



- Dedicated handhelds combine Nintendo & Sony packaged & digital game spending
- All ad revenue excluded

- Total iOS App Store and Google Play consumer spending on games eclipsed that of dedicated handhelds
- Dedicated handheld game consumer spending was significantly more seasonal, with nearly 60% of 4Q spending taking place in December

Portable Game Consumer Spending Shares by Region, 4Q12



- Google Play games revenue skewed toward Asia-Pacific, with Japan and South Korea driving growth in 2012

Top 5 Grossing Portable Games Worldwide by Platform, 4Q12

| Rank | iOS App Store | Google Play | Dedicated Handhelds |
|------|---|---|--|
| 1 | <u>Clash of Clans</u> Supercell, Finland | <u>Puzzle & Dragons</u> GungHo Online, Japan | <u>Pokémon Black / White Version 2</u> NDS; Game Freak, Japan |
| 2 | <u>Puzzle & Dragons</u> GungHo Online, Japan | <u>DragonFlight for Kakao</u> NextFloor, South Korea | <u>New Super Mario Bros. 2</u> N3DS; Nintendo, Japan |
| 3 | <u>Hay Day</u> Supercell, Finland | <u>Anipang for Kakao</u> SUNDAYTOZ, South Korea | <u>Animal Crossing: New Leaf</u> N3DS; Nintendo, Japan |
| 4 | <u>Kingdoms of Camelot: Battle for the North</u> Kabam, U.S. | <u>GREE</u> GREE, Japan | <u>Super Mario 3D Land</u> N3DS; Nintendo, Japan |
| 5 | <u>The Simpsons: Tapped Out</u> Electronic Arts, U.S. | <u>I Love Coffee for Kakao</u> PATISTUDIO, South Korea | <u>Mario Kart 7</u> N3DS; Nintendo, Japan |

Key Themes & Takeaways, 4Q12

- Combined consumer spending on iOS App Store & Google Play games exceed that of dedicated handheld games
- Nintendo & Apple were quite close in terms of total consumer spending on games
- Dedicated handheld gaming showed particular seasonality; close to 60% of 4Q12 consumer spending occurred in December, a significantly higher share than was the case for iOS App Store or Google Play game spending
- Asia-Pacific was quite pronounced in terms of Google Play's regional consumer spending on games, with Japan & South Korea out front

QUESTIONS?



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