



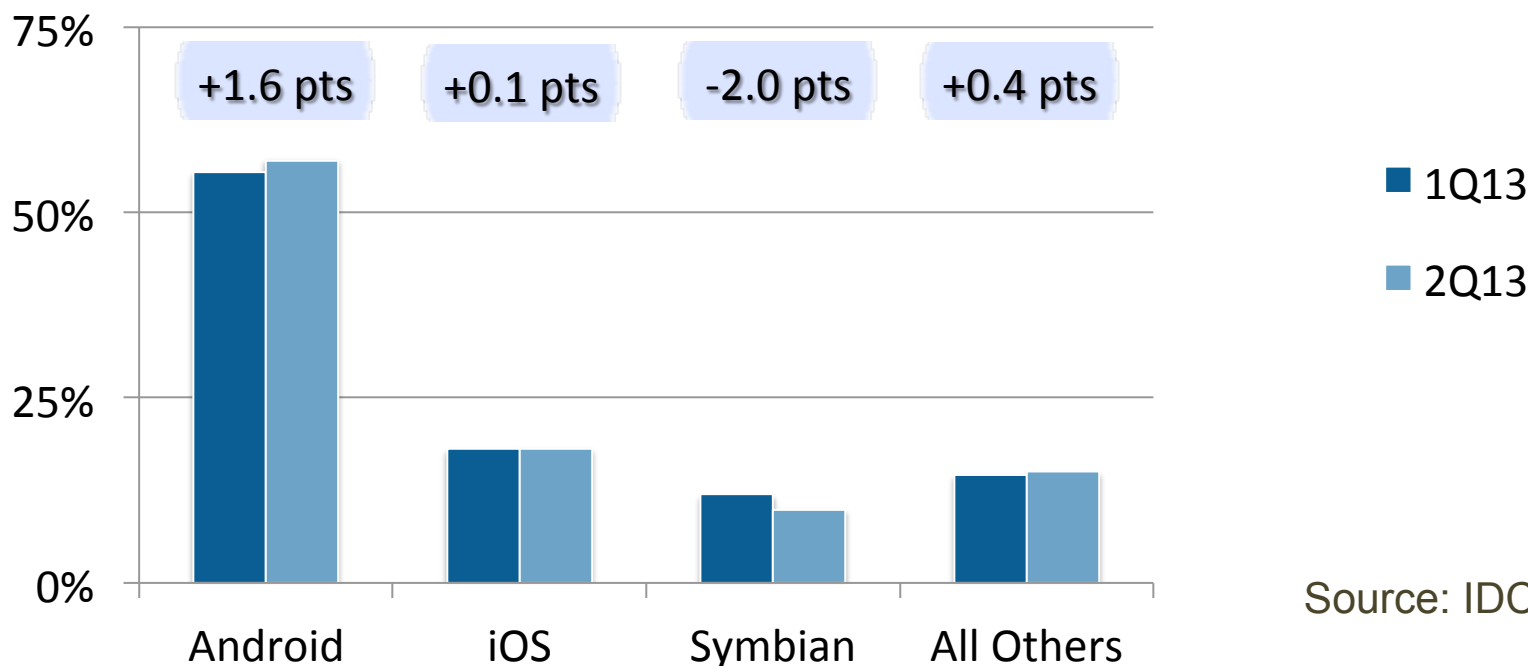
App Annie

Portable Gaming Spotlight, 2Q13
August 2013

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- 1 Installed Base Trends**
- 2 2Q13 Gamer Spending Deep Dive
- 3 Key Themes & Takeaways, 2Q13

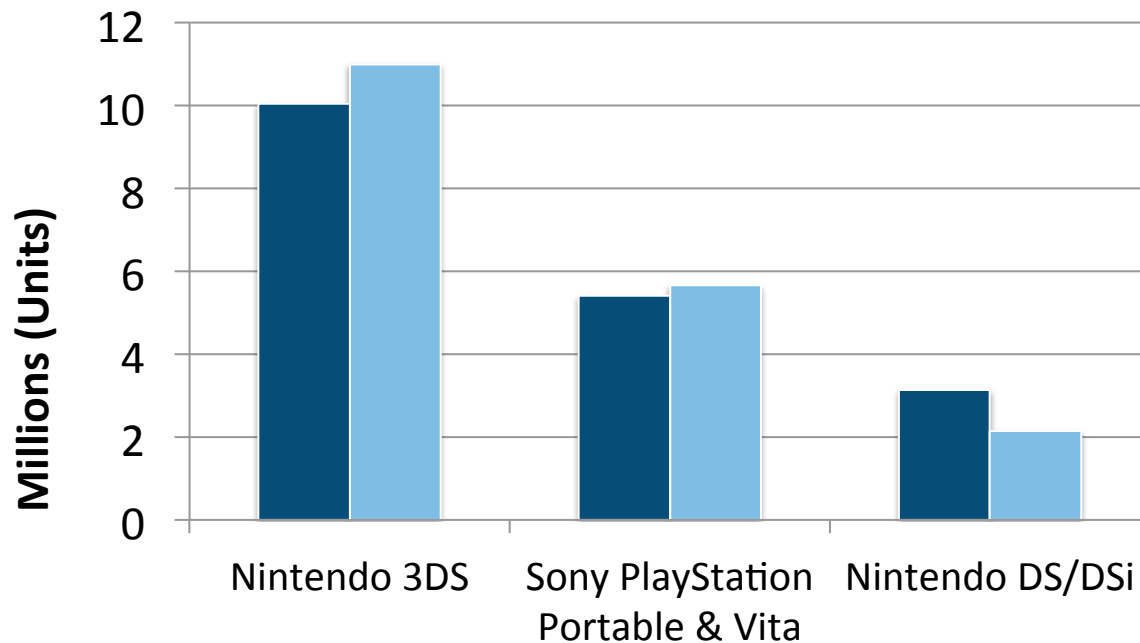
Worldwide Smartphone Installed Base Shares, 1Q13 & 2Q13



Source: IDC, 2013

- Android extended its lead by 1.6 share points
- BlackBerry & Windows-based devices comprised most of “All Others”
- The smartphone installed base grew to nearly 1.25B in 2Q13
- The consumer tablet installed base topped 180MM in 2Q13

Worldwide Gaming-Optimized Handheld Packaged Game Shipments & Digital Full Game Sales Volume, 1Q13 & 2Q13*



■ 1Q13 ■ 2Q13

- Hardware platforms span all SKUs

* This slide now reports combined packaged game shipments & digitally-purchased copies of these same games (titles that only receive digital distribution are excluded).

Source: IDC, 2013

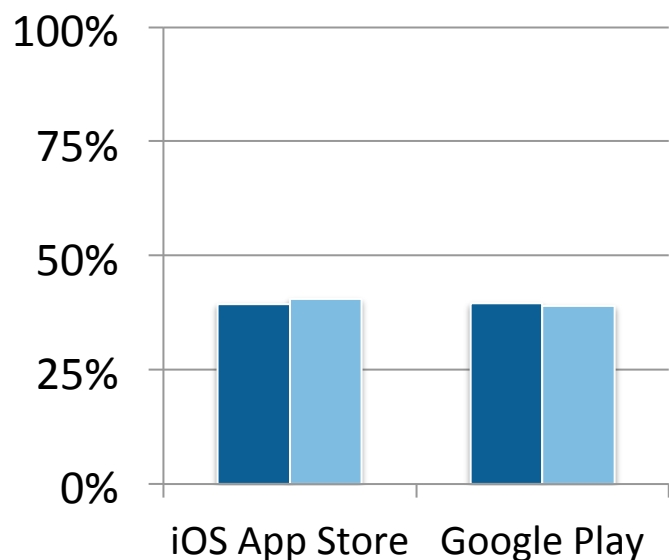
- Overall, card/disc shipments were roughly flat compared to 1Q13
- The gaming-optimized handheld installed base was ~200MM in 2Q13
- Digital sales advanced incrementally

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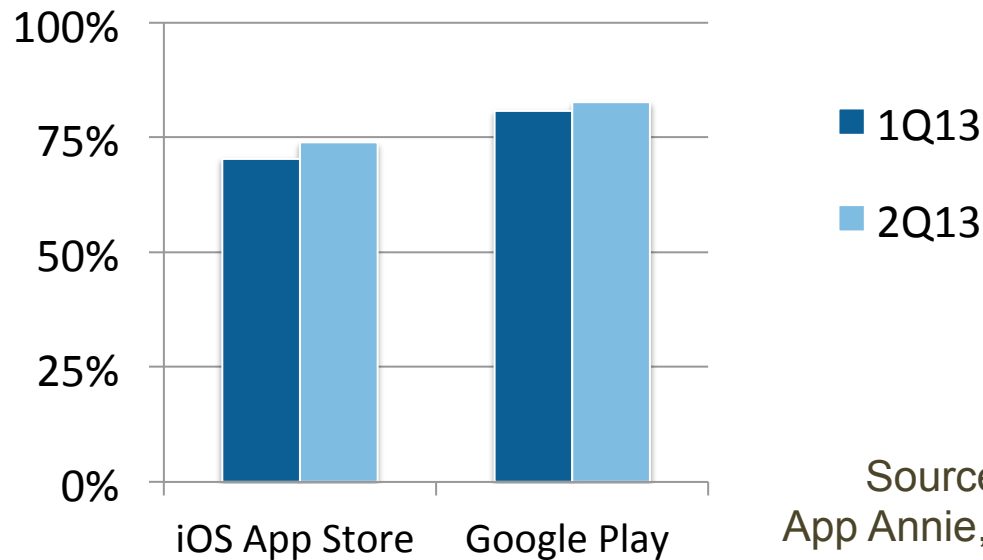
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Worldwide Share of iOS & Google Play Downloads & Consumer Spending Attributable To Games, 1Q13 & 2Q13

Games: Share of App Store Downloads



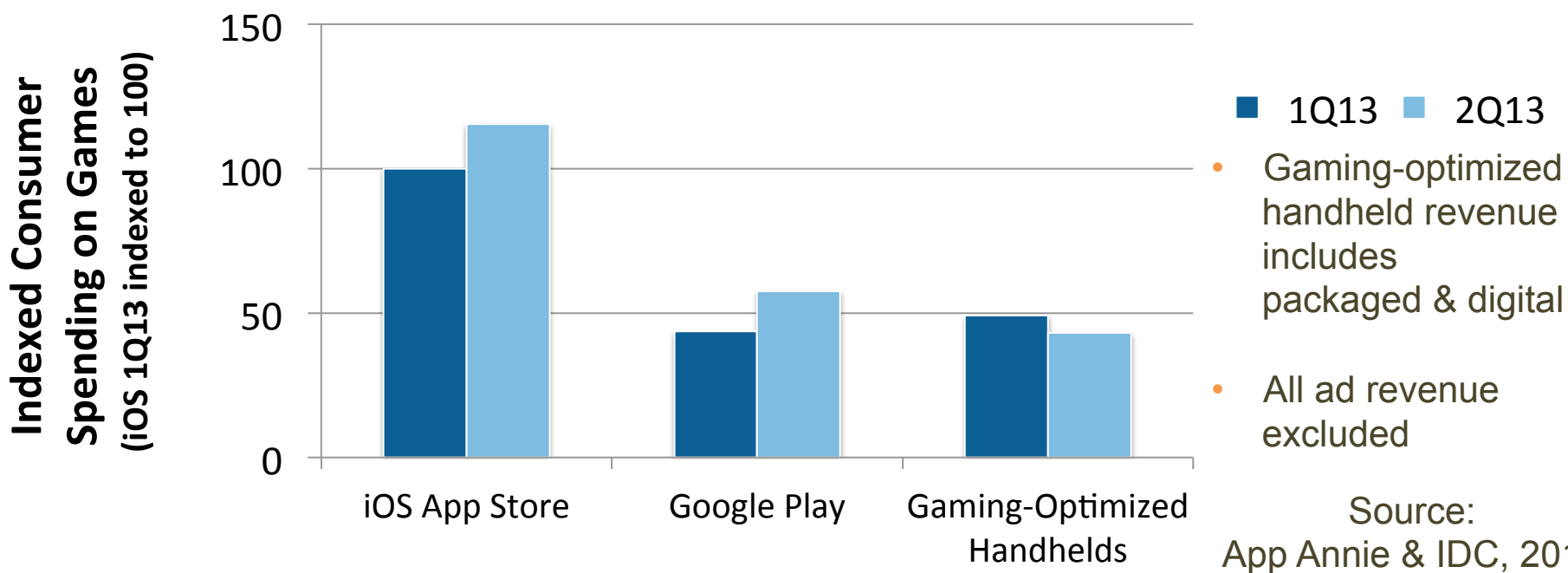
Games: Share of App Store Consumer Spending



Source:
App Annie, 2013

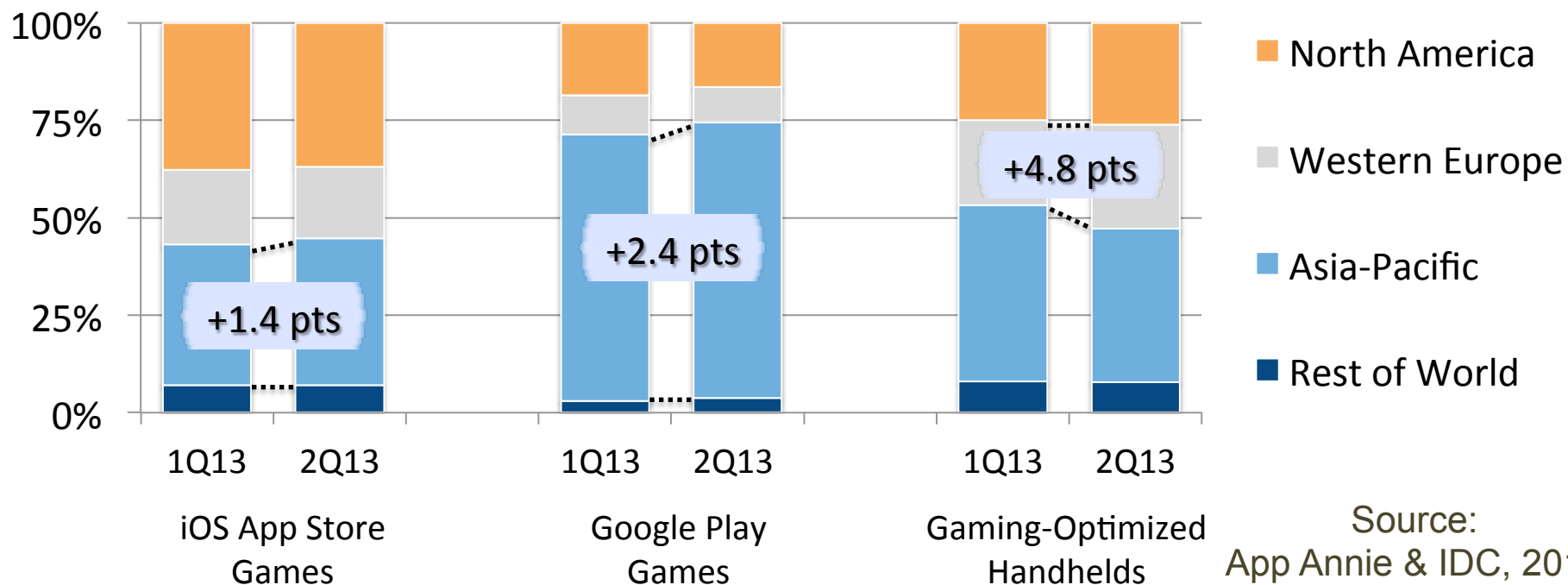
- Games continued to lead app store growth in 2Q13
- Games represented ~40% of downloads in both app stores
- Google Play spending was driven by games even more so than was iOS
- Includes all applicable smartphones & tablets, plus iPod touch

Worldwide Portable Game Consumer Spending, 1Q13 & 2Q13



- Game spend on Google Play surpassed that of gaming-optimized handhelds in 2Q13
- Both iOS App Store and Google Play grew game sales from 1Q13 to 2Q13

Portable Game Consumer Spending Shares by Region, 1Q13 & 2Q13



Source: App Annie & IDC, 2013

- Asia-Pacific gained in share of consumer game spending on both Google Play and iOS App Store
- Western Europe rebounded in the gaming-optimized handheld category

Top 5 Grossing Portable Games Worldwide by Platform, 2Q13

Rank	iOS App Store	Google Play	Gaming-Optimized Handhelds
1	<u>Clash of Clans</u> Supercell, Finland	<u>Puzzle & Dragons</u> GungHo Online, Japan	<u>Tomodachi Collection: Shin Seikatsu (New Life)</u> ★ N3DS; Nintendo, Japan
2	<u>Puzzle & Dragons</u> GungHo Online, Japan	<u>Candy Crush Saga</u> King, United Kingdom	<u>Animal Crossing: New Leaf</u> N3DS; Nintendo, Japan
3	<u>Candy Crush Saga</u> King, United Kingdom	<u>윈드러너 (Windrunner) for Kakao</u> WeMade, South Korea	<u>Luigi's Mansion: Dark Moon</u> N3DS; Nintendo, Japan
4	<u>Hay Day</u> Supercell, Finland	<u>쿠키런 (Cookie Run) for Kakao</u> ★ Devsisters, South Korea	<u>Donkey Kong Country Returns 3D</u> ★ N3DS; Nintendo, Japan
5	<u>The Simpsons™: Tapped Out</u> Electronic Arts, United States	<u>마구마구 (Fives) 2013 for Kakao</u> ★ CJ E&M, South Korea	<u>New Super Mario Bros. 2</u> N3DS; Nintendo, Japan

★ = New entrant to Top 5 in 2Q13 (not in Top 5 for 1Q13)

Source:
App Annie & IDC, 2013

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Key Themes & Takeaways, 2Q13

- Google Play game spending surpassed that of gaming-optimized handhelds in 2Q13
- Consumer spending on games for iOS App Store & Google Play combined rose to 4x that of gaming-optimized handhelds
- Games represented over 40% of app downloads and over 70% of app revenue in both the iOS App Store and Google Play
- Google Play game revenue continued to come mostly from the Asia-Pacific, especially Japan & South Korea
- Gaming-optimized handheld spending grew in Western Europe
- Nintendo 3DS continued to lead in gaming-optimized handheld software spending

QUESTIONS?



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