



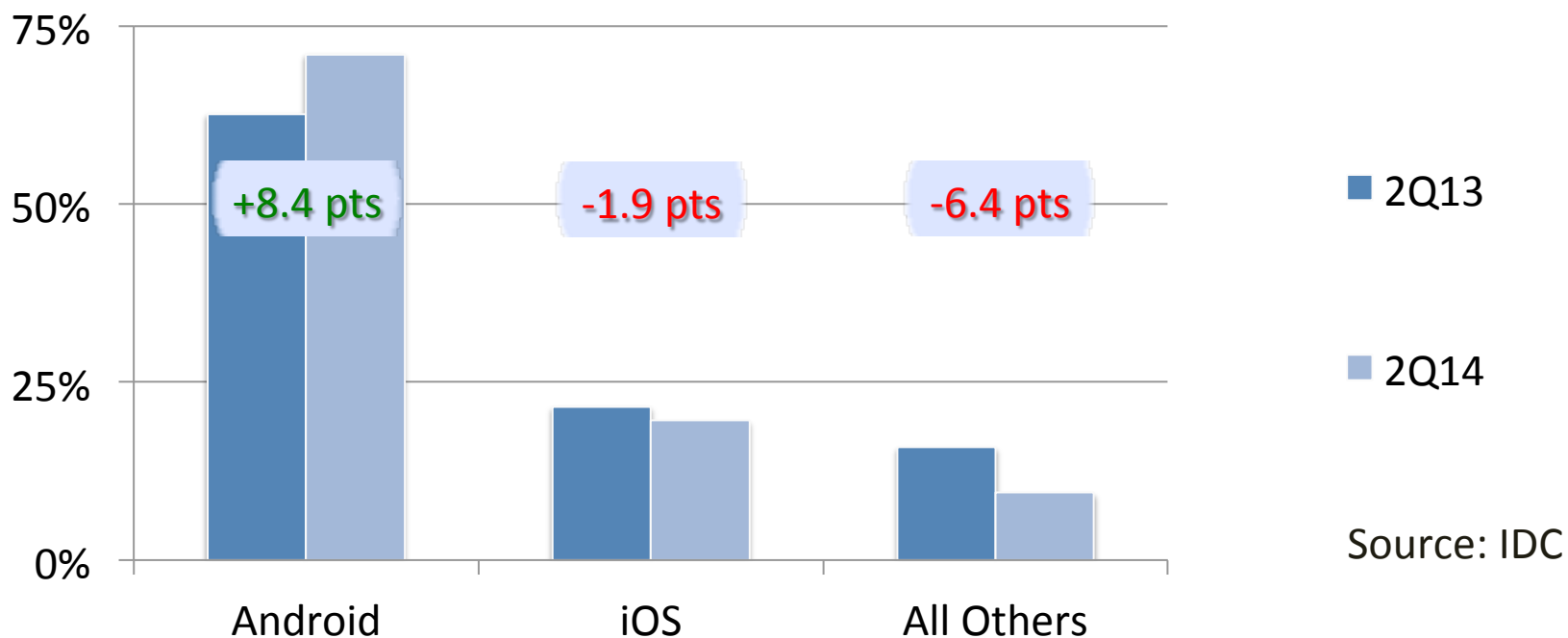
*App Annie*

Portable Gaming Spotlight, 2Q14  
September 2014

# AGENDA

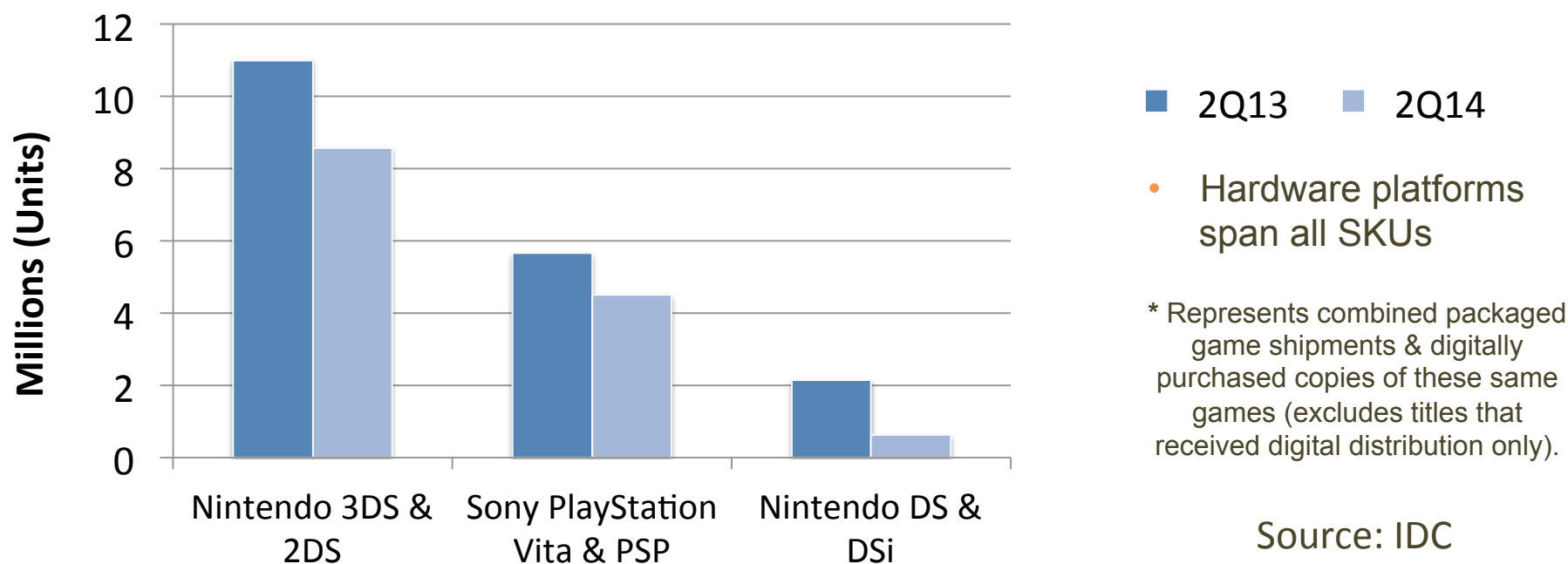
- 1 **Installed Base Snapshot**
- 2 2Q14 Spending Patterns
- 3 Key Themes & Takeaways

# Worldwide Consumer Smartphone & Tablet Installed Base Shares, 2Q13 & 2Q14



- Android's share of the combined consumer smartphone & tablet installed based (IB) hit 70%
- This combined consumer IB topped 2.1 billion worldwide
- "All Others" is mostly Windows Phone, BlackBerry & Symbian devices

## Worldwide Gaming-Optimized Handheld Game Shipments: Packaged Goods & Digital Full Game Downloads, 2Q13 & 2Q14\*

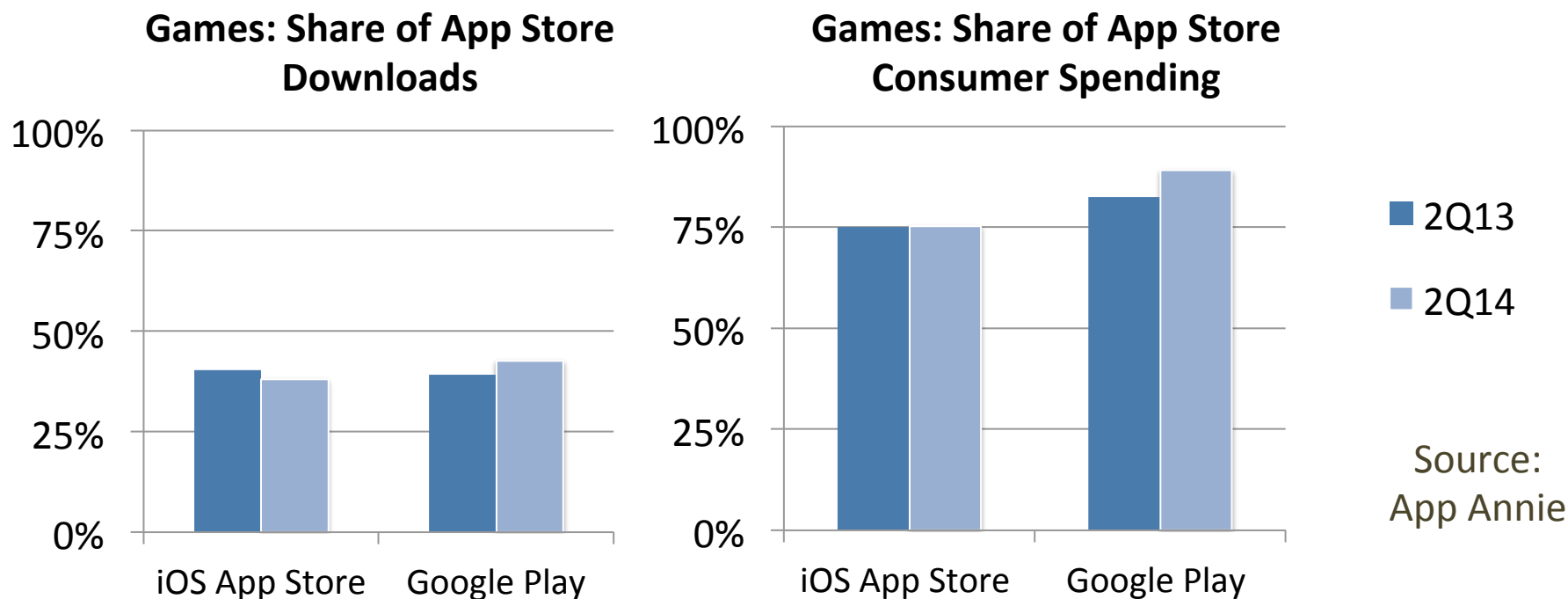


- The total installed base of these devices dipped under 200MM in 2Q14
- Total packaged & digital full game software shipments/sales volumes in 2Q14 were 27% lower than in 2Q13

# AGENDA

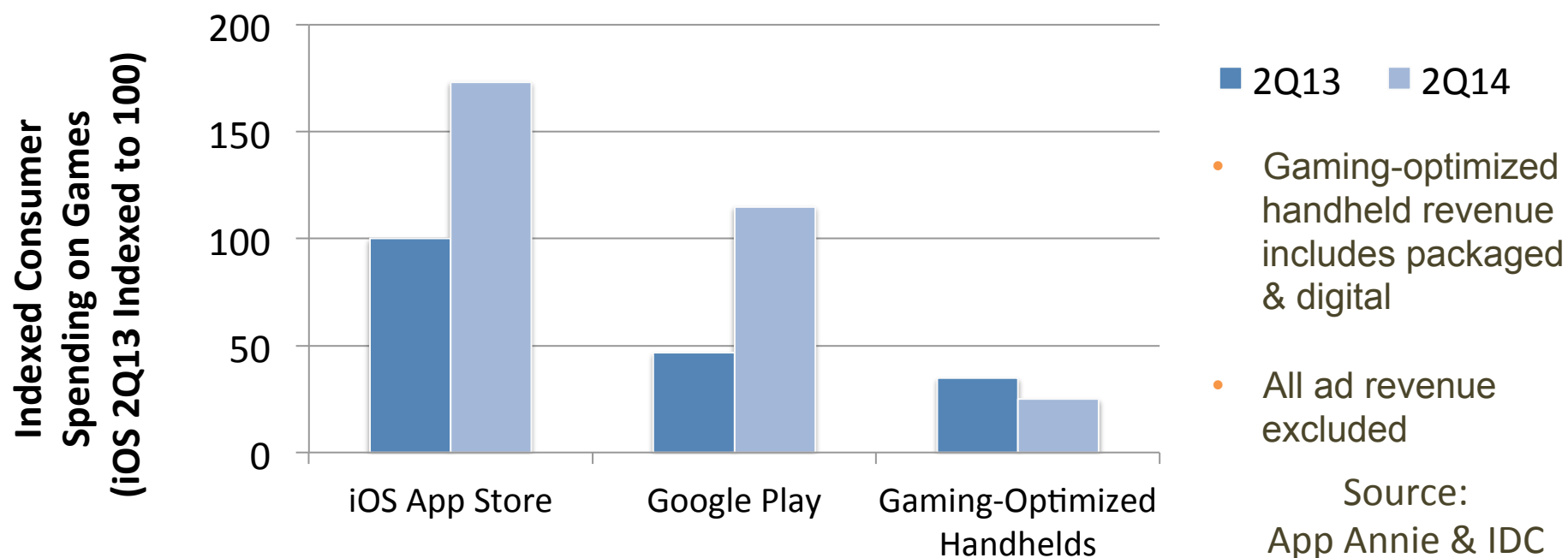
- 1 Installed Base Snapshot
- 2 2Q14 Spending Patterns**
- 3 Key Themes & Takeaways

# Worldwide Share of iOS & Google Play Downloads & Consumer Spending Attributable to Games, 2Q13 & 2Q14



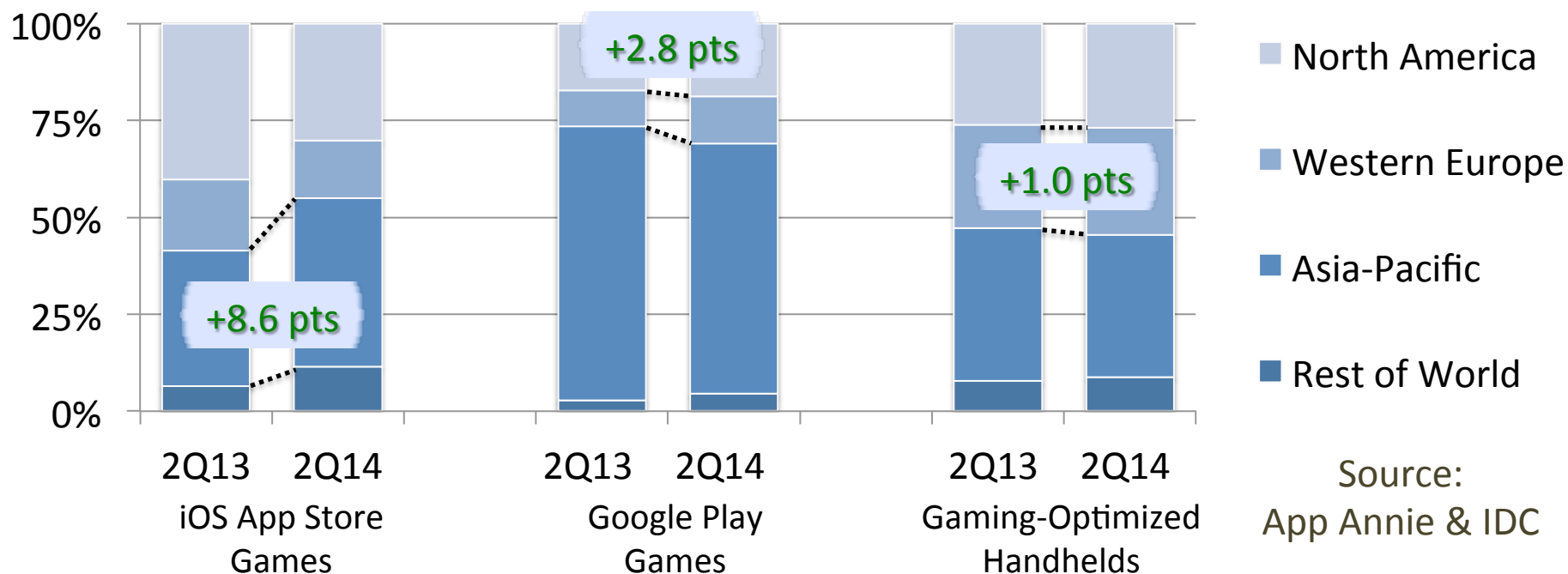
- Games represented around 40% of downloads in both app stores
- The share of consumer spending on games in Google Play grew incrementally from 2Q13 to 2Q14 & was effectively flat for iOS
- Results span applicable smartphones & tablets, plus iPod Touch

# Worldwide Mobile & Portable Game Consumer Spending, 2Q13 & 2Q14



- iOS app store game revenue grew over 70% from 2Q13 to 2Q14 & Google Play more than doubled total game revenue generated
- Gaming-optimized handheld software revenue declined 28% over the same period

# Worldwide Mobile & Portable Game Consumer Spending Shares by Region, 2Q13 & 2Q14



- Asia-Pacific gained in share of game spending in the iOS App Store, while Western Europe outpaced the market on Google Play
- On gaming-optimized handheld platforms, Western Europe (& Rest of World) showed incremental share gains



# Top 5 Grossing Portable Games Worldwide by Platform, 2Q14

Rank	iOS App Store	Google Play	Gaming-Optimized Handhelds
1	<a href="#">Clash of Clans</a> Supercell, Finland	<a href="#">Puzzle &amp; Dragons</a> GungHo Online, Japan	<a href="#">Pokémon X/Y</a> N3DS; Nintendo, Japan
2	<a href="#">Candy Crush Saga</a> King, United Kingdom	<a href="#">Clash of Clans</a> Supercell, Finland	<a href="#">Youkai Watch</a> N3DS; Level-5, Japan ★
3	<a href="#">Puzzle &amp; Dragons</a> GungHo Online, Japan	<a href="#">Candy Crush Saga</a> King, United Kingdom	<a href="#">Kirby: Triple Deluxe</a> N3DS; Nintendo, Japan ★
4	<a href="#">Game of War – Fire Age</a> Machine Zone, United States	<a href="#">モンスターストライク (Monster Strike)</a> Mixi, Japan ★	<a href="#">Animal Crossing: New Leaf</a> N3DS; Nintendo, Japan
5	<a href="#">Hay Day</a> Supercell, Finland	<a href="#">The World of Mystic Wiz</a> COLOPL, Japan	<a href="#">Freedom Wars</a> PSV; SCE Japan Studio, Japan ★

★ = New entrant to top 5 in 2Q14 (not in top 5 for 1Q14)

Source:  
App Annie & IDC

# AGENDA

- 1 Installed Base Snapshot
- 2 2Q14 Spending Patterns
- 3 **Key Themes & Takeaways**

# Key Themes & Takeaways, 2Q14

- Consumer spending on games increased notably from 2Q13 to 2Q14; iOS App Store revenue grew over 70% worldwide, while Google Play more than doubled in revenue
- iOS game revenue held up particularly well in the United States, generating ~2.4 times as much revenue as Google Play games
- Sony's PlayStation Vita showed signs of life in the gaming-optimized handheld space; a Vita title made the top 5 grossing list in consecutive quarters (Final Fantasy X/X2 HD in 1Q14, Freedom Wars in 2Q14)
- Seasonality & a relative lack of AAA-quality title releases depressed gaming-optimized handheld sales, but the launch pipeline suggests sales will rebound sharply in the latter half of this year

# QUESTIONS?



@lewisAWard  
@AppAnnie



[lward@idc.com](mailto:lward@idc.com)  
[press@appannie.com](mailto:press@appannie.com)

