

# Decoding The Gaming Audience

MMA Webinar Series  
June 15, 2020

In Partnership with:





# MMA IS 800+ MEMBERS STRONG GLOBALLY

## MARKETERS, AGENCIES, MEDIA SELLERS, TECHNOLOGY & OPERATORS



# MMA PURPOSE

## WHO

### The People We Serve

**Prime Audience:** *Chief Marketers*

By helping Marketers do Mobile better, everyone wins. MMA membership represents Marketers, Agency, Media and Technology Enablers from across the globe.

## WHY

### Our Reason for Being

**Mission:** To accelerate the transformation and innovation of marketing through mobile, driving business growth with closer and stronger consumer engagement.

## WHAT

### Our Strategic Priorities



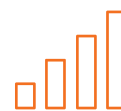
#### **Cultivating Inspiration**

Aimed at the Chief Marketer;  
guiding best practices and  
driving innovation



#### **Building Capability for Success**

Fostering know-how and  
confidence within the Chief  
Marketer's organization



#### **Demonstrating Measurement and Impact**

Proving the effectiveness and  
impact of mobile through  
research providing tangible ROI  
measurement and other data







#### **Advocacy**

Working with partners and  
our members to protect the  
mobile marketing industry



# MMA: RESHAPING THE FUTURE OF MOBILE MARKETING

 <b>Mobile ROI Research</b>	 <b>Marketing Attribution Think Tank</b>	 <b>To Rethink Mrktg Org</b>	 <b>Marketer Brand Safety Council</b>
<b>Industry Working Groups</b> <b>Driving the Future of Marketing &amp; Mobile</b>	<b>Guidelines &amp; Best Practices</b> <b>Viewability, Location, Native</b>	<b>MM25 Marketer Peer Group</b> <b>Tackling Core Issues for Marketers</b>	<b>Shared Knowledge of 800+ Members</b> <b>Entire Mobile Ecosystem Worldwide</b>
<b>SMARTIES</b> <b>Awarding Best in Class Mobile Campaigns</b>	<b>CEO &amp; CMO Summit</b> <b>Annual Mobile Think Tank</b>	<b>1,000+ Mobile Case Studies</b> <b>Inspiring Creative Innovation</b>	<b>30+ MMA Events</b> <b>Spread across 20 Countries</b>



# UPCOMING WEBINARS

- ≡ June 17 - Social Commerce: The Next Normal?
- ≡ June 19 - #ShapingTheFuture with Mobile Economy & Advertising ....there is no Playbook for this
- ≡ June 25 - The Marketer's Guide to Fighting Marketing & Mobile Fraud
- ≡ June 25 - Using Artificial Intelligence and Data to Transform Marketing
- ≡ June 26 - #NewBusinessModels through Venture Building: Ideate, Incubate, Accelerate
- ≡ July 3 - #Energizing Customer Experience & Communication



[ABOUT](#) [MEMBER CENTER](#) [PROGRAMS](#) [EVENTS](#) [EDUCATION](#) [RESEARCH & INSIGHTS](#) [MATT / MOSTT / SAVE](#) [SMARTIES](#) [JOIN MMA](#) [Q](#)

# MMA COVID-19 Marketer Support Hub

#WeAreInItTogether



Select region: **Global** | [APAC](#) | [EMEA](#) | [LATAM](#) | [North America](#)

## RECENT UPDATES

**Best Of COVID-19 Ads**  
10 hours 40 min ago

**COVID-19 Emails: Key Considerations And Tips**  
10 hours 54 min ago

**What The Coronavirus (COVID-19) Means For Marketers**  
10 hours 59 min ago

**How to Adapt Your Marketing During the Coronavirus (COVID-19)**  
11 hours 2 min ago

Search...

**TRACKING COVID-19 AND ITS  
IMPACT AROUND THE  
WORLD**

**HUMAN RESOURCES,  
BUSINESS TOOLS AND TIPS**

**MARKETING AND  
ADVERTISING TODAY! & IN  
THE FUTURE**

**BUILDING OUR MARKETING**

**CONSUMER TRENDS AND**

**LIGHT-HEARTED**









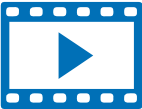

<https://www.mmaglobal.com/marketersupporthub/weareinitttogether>



# MMA PROGRAMS & INITIATIVES



Our programs and working groups consist of executives who discuss key issues for a specific industry segment, technology or business issue. The programs and working groups meet on an ongoing basis to develop and execute industry initiatives that reflect the needs of their initiative area and membership.

 Currency Measurement	 Internet of Things	 Location	 Mobile Games	 Mobile Messaging
 Mobile Native Advertising	 Mobile Programmatic	 Mobile Shopper Marketing	 Mobile Video	 Privacy



Enroll by emailing [committees@mmaglobal.com](mailto:committees@mmaglobal.com)





# MANAGING YOUR QUESTIONS

Share the Insights

#MMAWeb

The screenshot shows the GoToWebinar Control Panel window. At the top, the title bar reads "GoToWebinar Control Panel". Below it is a blue header bar labeled "Audio". Under the "Audio" section, there are two radio buttons: "Use: Telephone" and "Mic & Speakers", with "Mic & Speakers" selected. Below the radio buttons is a microphone icon, the word "MUTED" in red, a speaker icon, and a volume level indicator. Below the audio section is a "Talking:" label. Underneath is a blue header bar labeled "Questions". Below the "Questions" header is a large empty text area for typing a question. At the bottom of the text area is a "Send" button. Below the "Send" button is a text box containing the text "Tentative: Mobile & Privacy: Actionable Steps for Success" and "Webinar ID#" followed by a blue input field. At the very bottom is the "GoToWebinar" logo.





## PRESENTER

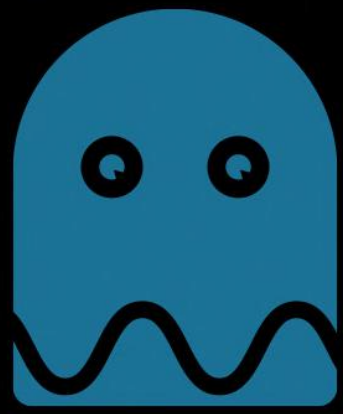
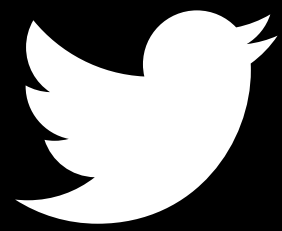


**Martyn U'ren**  
Head of Research, Asia Pacific and MENA  
Twitter

## MODERATOR/HOST



**Shanti Tolani**  
Country Manager Indonesia  
Mobile Marketing Association



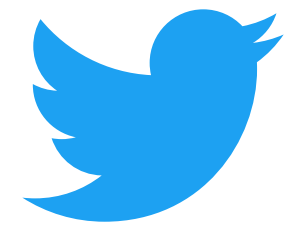
# Decoding the gaming audience





# **Poll:** **What do you think is the most talked-about game of 2020?**

- **Animal Crossing**
- **Fortnite**
- **League of Legends**
- **PUBG**



# Poll: What do you think is the most talked-about game of 2020?

13.33%

Fornite

20%

Animal Crossing

13.33%

League of Legends

43.33%

PUBG

10%

Mobile Legends

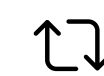




Martyn U'ren  
@martynuren



How's [#circuitbreakersg](#) dinner took a bit longer tonight - but thanks [@IdrisUren](#) (plasters are for show no fingers we're hurt)



08 Apr 2020

**Martyn  
U'ren**

Head of Research, APAC & MENA, Twitter

[@martynuren](#)



# APAC Gaming 2020







Not a new trend but an accelerated one  
**Strong position to offer  
more than TV?**







## 1990

Gaming Consoles were popular

Atari 2600 VCS  
Nintendo Entertainment System  
Nintendo's Gameboy  
Sega Genesis  
Sony's Playstation  
Pre-installed, Snake

## 2000s

Move into more portable gaming methods

PS2  
Microsoft's Xbox  
Nintendo release DS  
Sony's Playstation Portable  
X360  
Cross Fire  
Angry Birds (2009)  
Plants vs Zombies (2009)

## 2010s

Rise of Mobile gaming

Nintendo Wii U2  
Candy Crush Saga (2012)  
PS, PS4 Pro  
Pokemon GO (2016)  
PUBG Fortnite  
Just Dance  
Hyper Casual Gaming

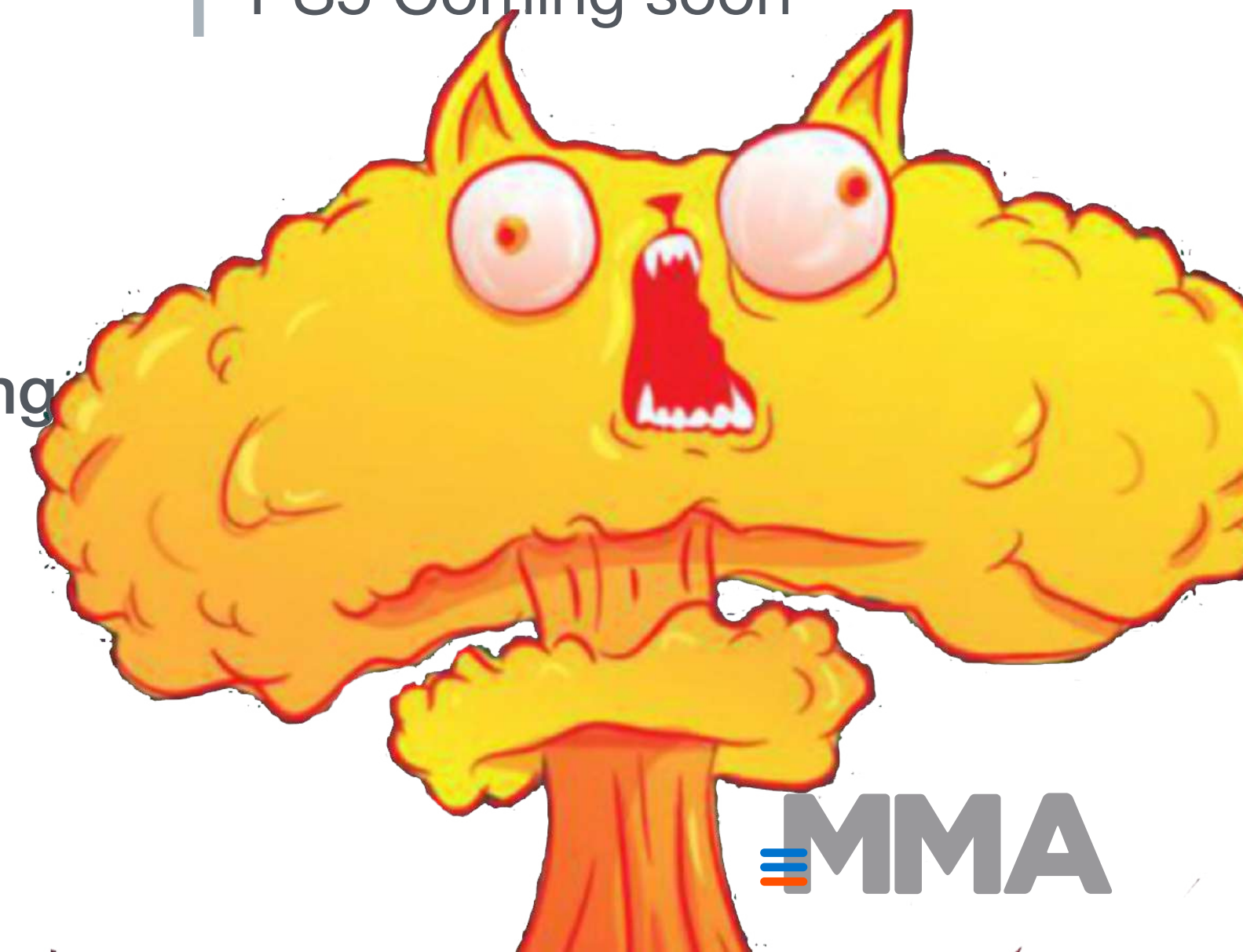
## 2020s

Rise in a different

Animal Crossing increases in popularity  
PS5 Coming soon

# Gaming Timeline

Source | Twitter MI&A APAC | <https://www.techtimes.com/articles/57048/20150604/gaming-go-future-mobile-vs-consoles.htm>



MMA



A League of Legends character, likely Yasuo, is shown in a dynamic pose on the left side of the image, holding a long sword. The character is wearing traditional Japanese-inspired armor in shades of gold and brown.

# 100M

unique online viewers for the  
“League of Legends” World  
Championship finals in South Korea  
in Nov. 2018

# vs

# 98M

Number of viewers during  
the Super Bowl 2018





# 5M

Viewers up to date on Twitter for the best Fortnite solo player in the world

Source | Twitter MI&A APAC







# +28%

the Twitter audience is more likely to play games  
(online, on their phone, or on a console) vs. online population

Source | Kantar Twitter Audience Deep Dive Research, market: APAC







# APAC Gaming conversation is rising



Source | Twitter Internal data, Gaming, JAPAC(SG, ID, MY, TH, PH, AU, IN, JP), April 1st 2019 - May 11th 2020.







# APAC Gaming conversation is rising

COVID boost

**+55%**

April 2020 yoy



Source | Twitter Internal data, Gaming, JAPAC(SG, ID, MY, TH, PH, AU, IN, JP), April 1st 2019 - May 11th 2020.







# 247M

Tweets about Gaming across  
APAC in April

Source | Twitter Internal data, Gaming, JAPAC(SG, ID, MY, TH, PH, AU, IN, JP), April 2020.



MMA





# 103M

Unique Authors



Source | Twitter Internal data, Gaming, JAPAC(SG, ID, MY, TH, PH, AU, IN, JP), April 2020.





# Gaming 2020







# 16.7M

Tweets around Animal crossing  
from 1- 12 May 2020 globally







Having fun but also staying  
connected to friends - especially  
for GenZ in SEA







Source | Twitter Internal data, May 2020



Tom Nook UK  
@AC\_Isabelle



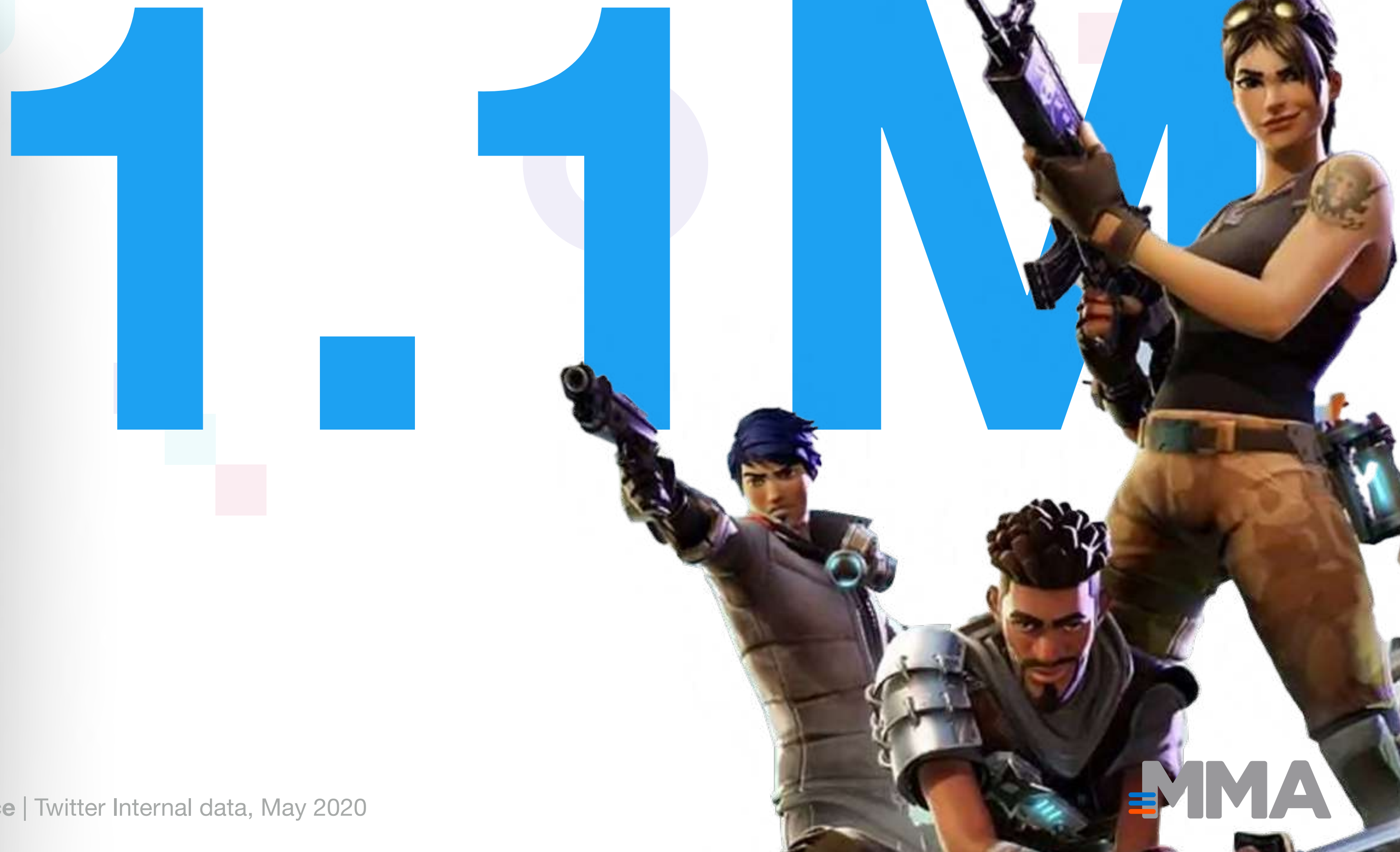
[News] The musicians behind the main theme of [#AnimalCrossing](#) 🦊: New Horizons have come together virtually for this special performance. We hope you enjoy it! [#ACNH](#) 🦊







## views of Fortnite Party Royale LIVE on Twitter



Source | Twitter Internal data, May 2020









**EPIC | EMOTE**  
**GLOWSTICKS**

Make it glow.  
Introduced in **Season 7**.

**V 800**

**V PURCHASE**

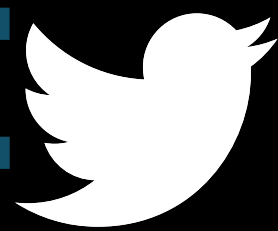
**X BUY AS A GIFT**

2FA required to send gifts

**V 3,050**







# Audience







of the Gaming audience on Twitter  
have taken an action on Twitter

92%



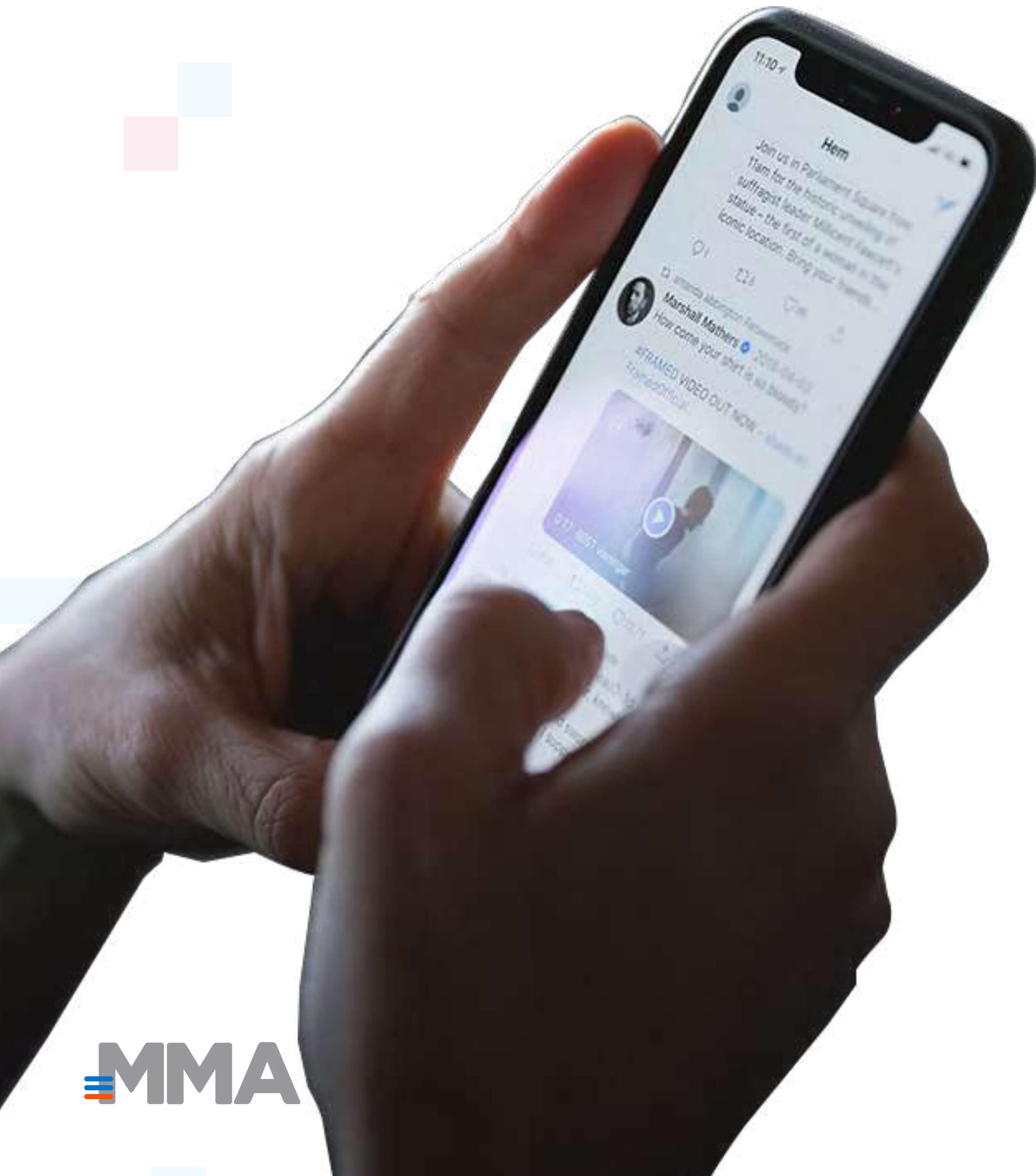
Source | Kantar TNS Twitter Consumer Deep Dive Survey, APAC, 2018

Twitter users want to see  
more from Gaming brands

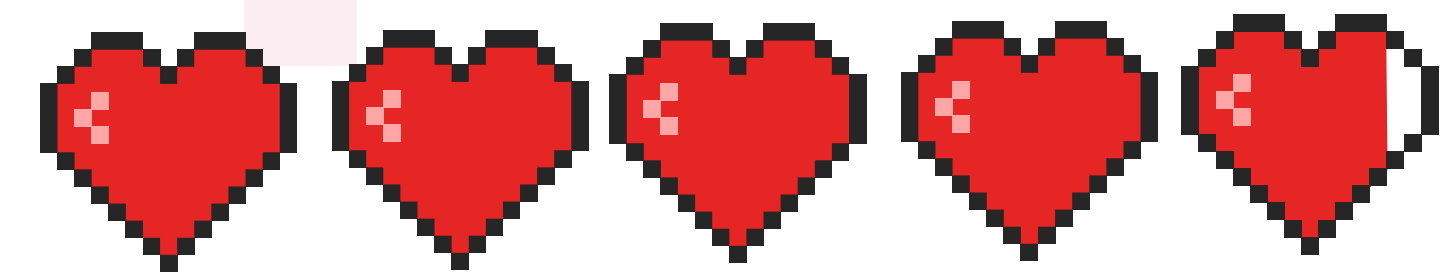
91%



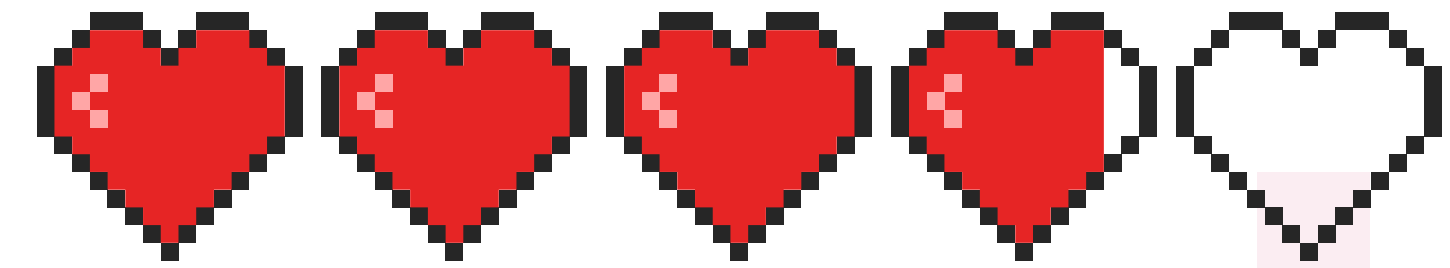




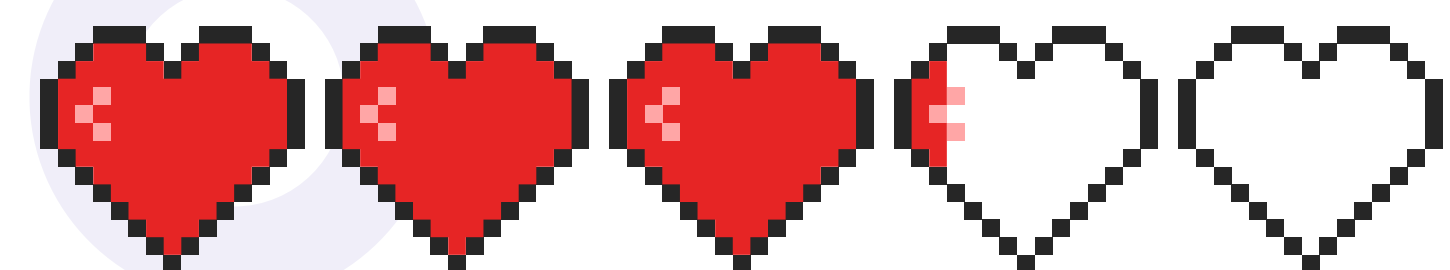
**94%**  
Weekly or more often



**78%**  
Daily or more likely



**62%**  
Constantly or  
Multiple Times a day



# Twitter Activity for Gamers





# 48%

follow brands on  
Twitter

Source | Kantar TNS Twitter Consumer Deep Dive Survey, APAC, 2018







# Understand the behaviour and needstate of gaming during COVID

Source | Twitter Internal, conversation data around Gaming, 1 Jan 2020 - 31 Mar 2020, location: ID/MY/PH/SG/TH, retrieved Apr 2020.





# Levelling up during COVID-19

Analysis of 5M tweets

(Jan-Apr 2020)

Insights into the  
conversation

SEA - TH, ID, SG, MY, PH

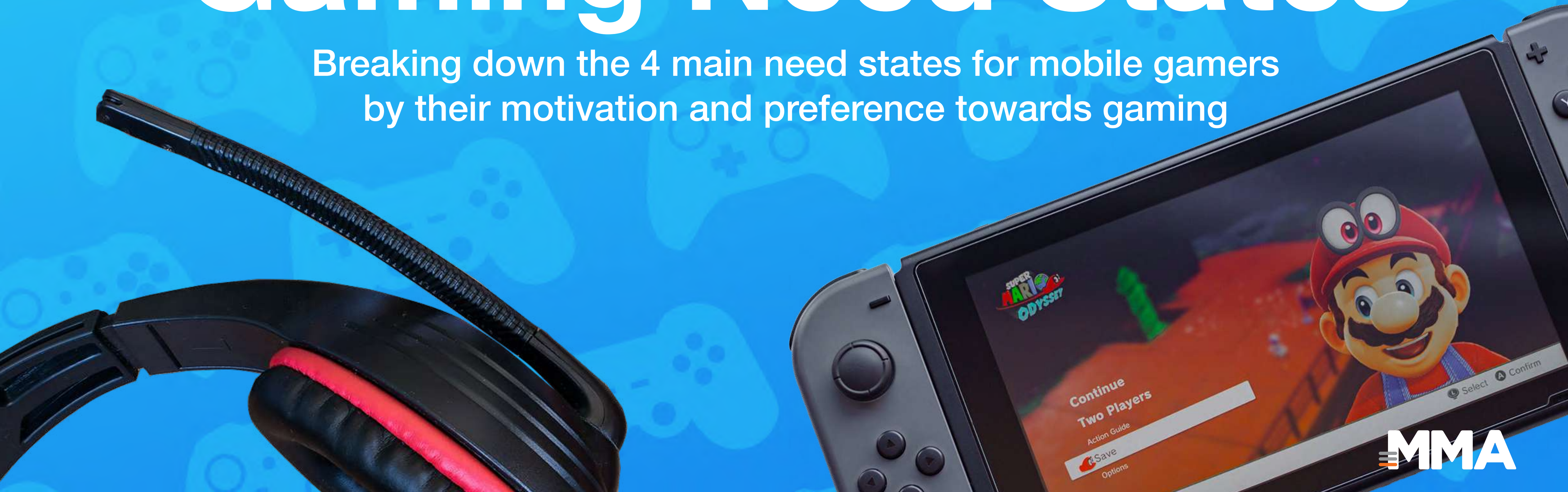






# Gaming Need States

Breaking down the 4 main need states for mobile gamers  
by their motivation and preference towards gaming







	Achieving	Thrill Seeking	Unwinding	Exciting
<b>Most likely to play:</b>	<ul style="list-style-type: none"><li>• Racing Games</li><li>• Educational Games</li><li>• Sports Games</li></ul>	<ul style="list-style-type: none"><li>• Strategic Games</li><li>• Action &amp; Arcade Games</li><li>• Role- Playing Games</li></ul>	<ul style="list-style-type: none"><li>• Puzzle games</li></ul>	<ul style="list-style-type: none"><li>• Up to 7 Genres with no preference</li></ul>
<b>Why they download:</b>	<ul style="list-style-type: none"><li>• Poses a new challenge</li><li>• Has high quality graphics</li></ul>	<ul style="list-style-type: none"><li>• Generates excitement</li><li>• Poses a new challenge</li><li>• Links to real life interests</li></ul>	<ul style="list-style-type: none"><li>• Generates excitement</li><li>• Links to real-life interests</li><li>• Has good reviews</li></ul>	<ul style="list-style-type: none"><li>• Generate excitement</li><li>• Poses a new challenge</li><li>• It's a new genre/ type of game</li></ul>
<b>Why they uninstall:</b>	<ul style="list-style-type: none"><li>• Finished the game</li><li>• Took too much memory</li><li>• Got bored</li></ul>	<ul style="list-style-type: none"><li>• Got bored</li><li>• Took up too much memory</li><li>• Finished the game</li></ul>	<ul style="list-style-type: none"><li>• Got bored</li><li>• Took up too much memory</li><li>• Finished the game</li></ul>	<ul style="list-style-type: none"><li>• Got bored</li><li>• Took up too much memory</li><li>• Finished the game</li></ul>







COVID-19 triggered need states:  
**Socialising. Normalising.  
Idling**





## Socialising

Most confined within their own homes, individuals are turning to games to stay connected with their friends and families.

## Normalising

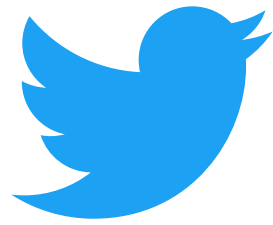
With the pandemic disrupting everyone's lives one way or another, individuals are turning to games to seek some form of normalcy in their daily routine.

## Idling

Restricted movement limits the activities that can be done indoors, and gaming serves as an outlet to pass time during this mundane period.



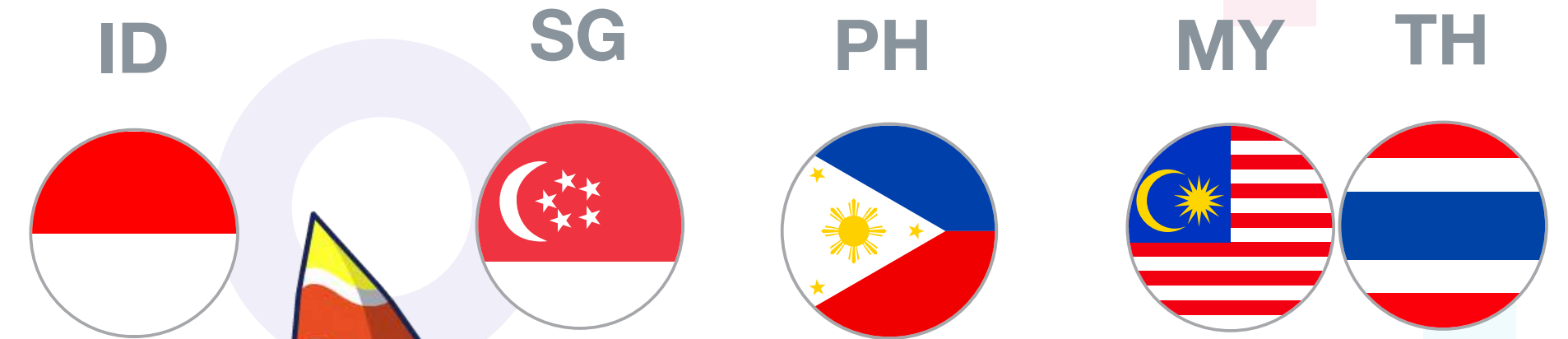




# Socialising

Staying connected to Family and Friends

Not keen to Connect



Most socialising







# Singapore

Friends and partners are virtually spending time together by having their game characters interact in the same space within games like Animal Crossing and Minecraft.



Just my boyfriend I being cute in [#ACNH](#) 

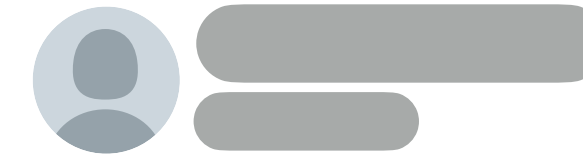






# Malaysia

Not limited to friends, social activities also prioritise family time as well as getting to engage with netizens online



**nampak macam best je main game dekat instagram story. tapi followers aku ramai yang tak mesra alam hahshshahs**

**masa aku buat question pun, followers dari twitter jugak yang reply. ada baik aku main twitter je.**

[Translate](#)

**Although it seems like playing IG games is fun, my followers are less friendly. When I ask**





# Thailand

Socialising in gaming has been led by Esports groups who have launched “Esports from home” tournaments to keep people from going out



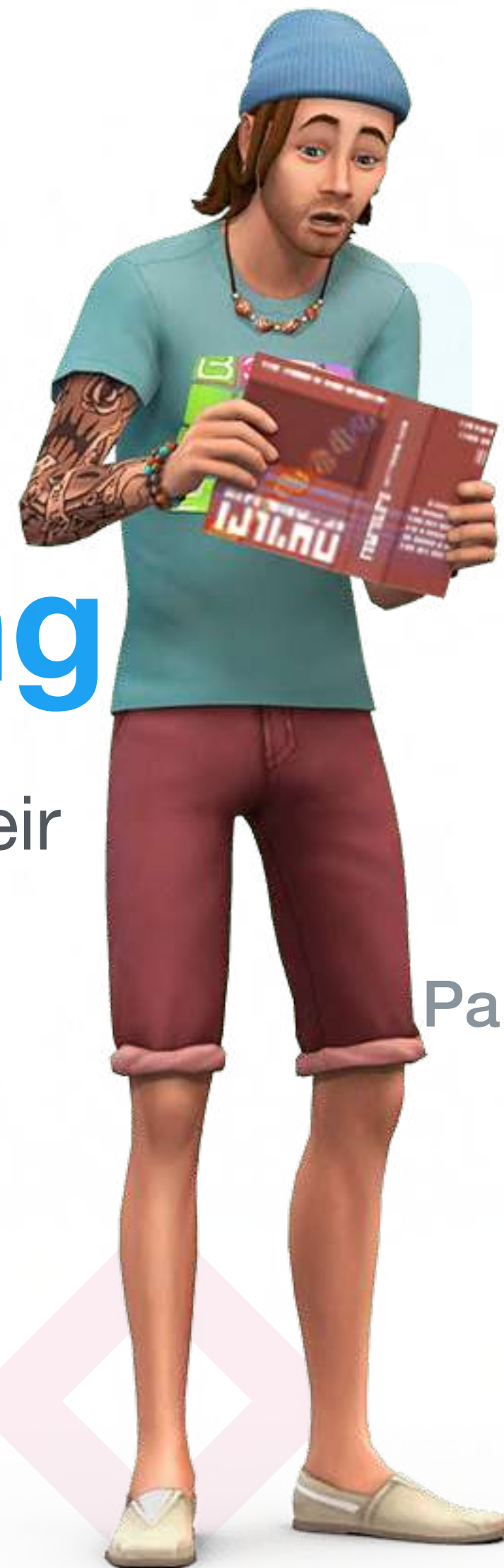
**The official PUBG MOBILE competition for prizes worth over 2 million baht**





# Normalising

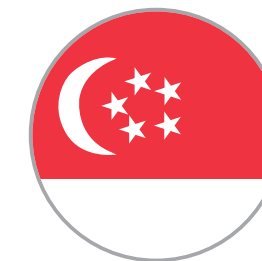
Seeking normalcy in their daily routine



MY



SG



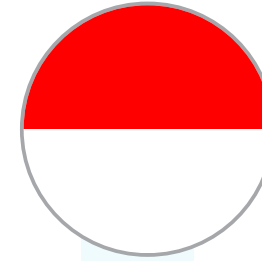
TH



PH



ID



Part of Normal Routine

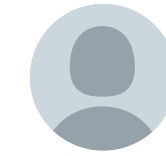
Escape from Reality





# Singapore

Amidst the Circuit Breaker, people are balancing their daily routine of work, studying and chores with some form of gaming involved. Some have even hosted graduation ceremonies in games like Minecraft.



**I really can't understand boredom during the CB like seriously do y'all not have things to do.**

- **organising room/house**
- **Cleaning**
- **laundry**
- **more cleaning**
- **binging shows**
- **talking to friends online**
- **gaming**
- **eating**





# Malaysia

Individuals use games as their way to continue with mundane daily routines, especially during a time of restricted movement.



**Few days in quarantine, I've picked up a new book, played some games with my little brother, spent time with my mom, made some videos with my nephews and learned a new song on my piano.**



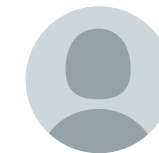
**I like to open animal crossing a few times a day just to run around the island for like 20 minutes not do anything, just run around, it's relaxing**





# Thailand

Gaming has been promoted to relieve stress during the pandemic.



คือทุกวันนี้เบื่อบ้างอะ อยู่แต่บ้าน  
เล่นเกม ดูหนังเล่น โทรศัพท์ กิน นอน

[Translate](#)

**During this situation, gaming  
can help you relax and  
minimise stress.**







# Indonesia

Gaming plays less of a cohesive role, where individuals are not as keen to chat or establish a relationship through the channels



**"Keluarga Sim-ku hidup bahagia walau di dunia nyata sedang terjadi pandemi, dan aku ikutan senang melihatnya."**

[Translate](#)

**My SIMS family is living in bliss though the world is facing a pandemic, I'm happy to have that.**

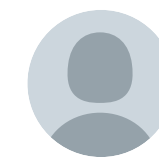






# Philippines

Filipinos have not just used games as a venue to hangout with friends but also to have creative collaboration with them (especially with games like Animal Crossing and Minecraft).

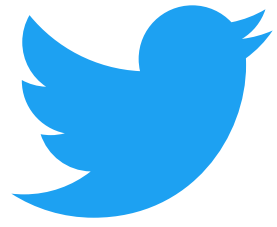


[Redacted name]



**This lockdown has got to my fiancé... I said to him “apparently there was a meteor shower tonight” and he asked whether irl or in [#ACNH](#) 🐻**





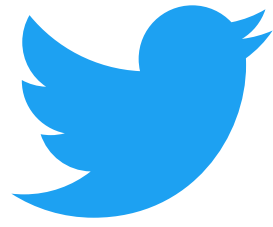
# Key Insights for targeting

1

**Gaming exposes  
differences in  
purchasing power**

Singapore vs.  
Thailand





# Key Insights for targeting

1

**Gaming exposes  
differences in  
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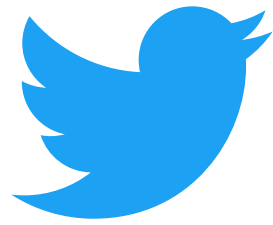
Singapore vs.  
Thailand

2

**Need-state  
fulfilment reduces  
\$ barriers**

Thailand eSports  
now carries greater  
value





# Key Insights for targeting

1

Gaming exposes differences in purchasing power

Singapore vs. Thailand

2

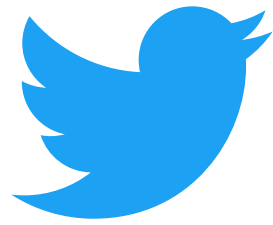
Need-state fulfilment reduces \$ barriers

Thailand Esports now carries greater value

3

Indonesia struggles with connectivity - look towards offline gaming





# Key Insights for targeting

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Gaming exposes differences in purchasing power

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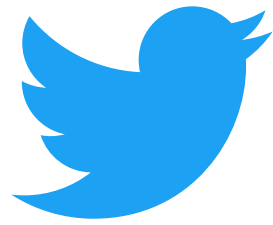
3

Indonesia struggles with connectivity - look towards offline gaming

4

Malaysia female gamers more focused on developing an external connection





# Key Insights for targeting

1

Gaming exposes differences in purchasing power

Singapore vs. Thailand

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Need-state fulfilment reduces \$ barriers

Thailand eSports now carries greater value

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Malaysia female gamers more focused on developing an external connection

5

Philippines & Thailand expressions of normalising focused on eSports conversations





## Level 2

### Accelerated

---

Gaming conversation has been boosted and continues to rise

### Interactive

---

Delivering key need states to connect with friends - an advantage over TV?

### Twitter

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Connecting to the gaming conversation





# Connect with what's happening in Gaming and eSports with Amplify Sponsorships

## Esports



## General Gaming



## Always on





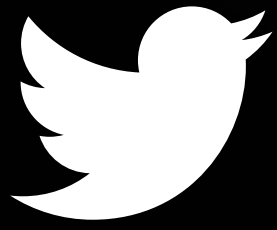


Get  
Inspired



MMA





# The Game: E3 Expo

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Gaming Convention / Location : E3 2019  
(@XBoxANZ)

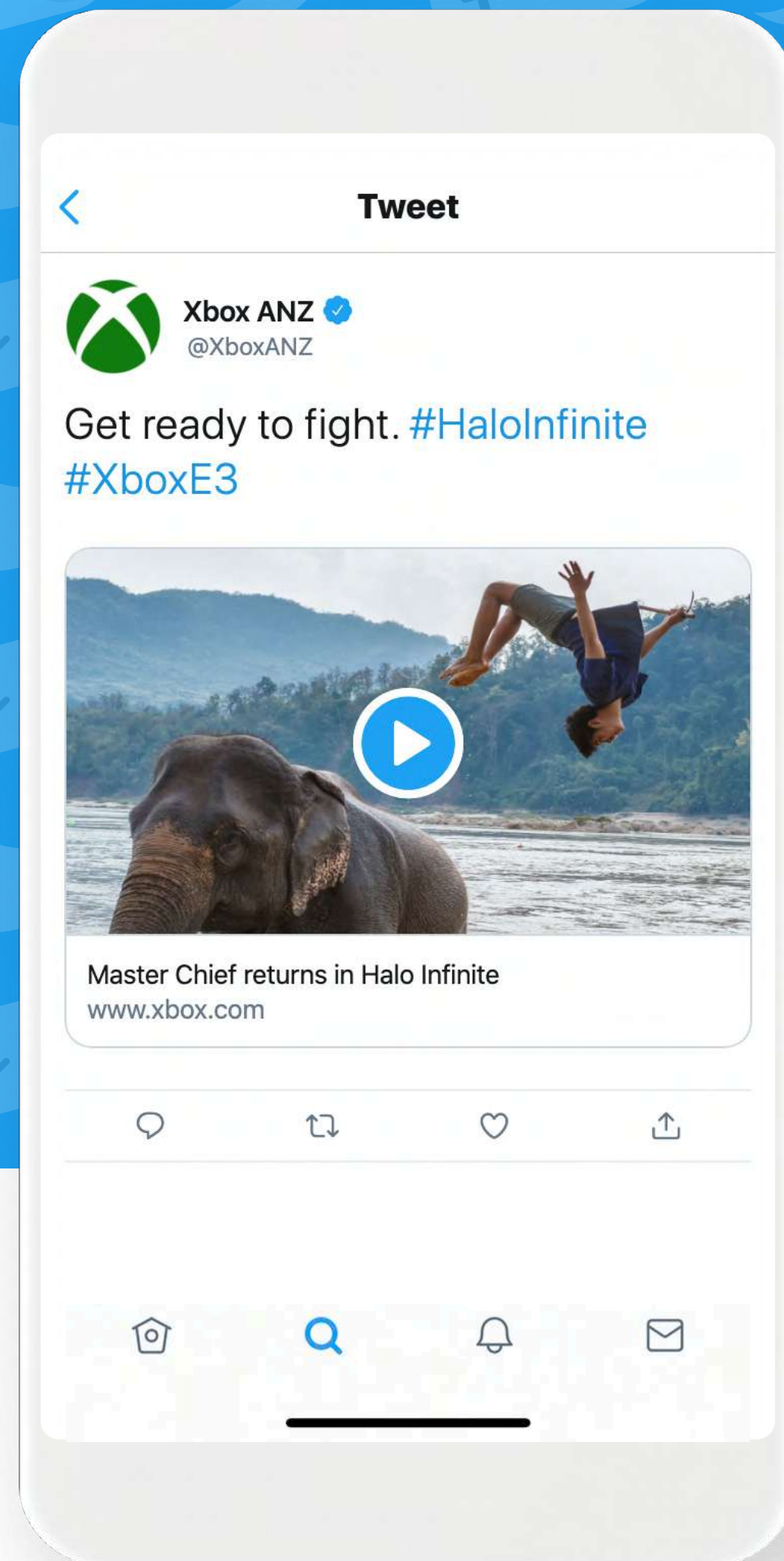
Attendance: 70K

Player: XboxANZ (@XboxANZ)

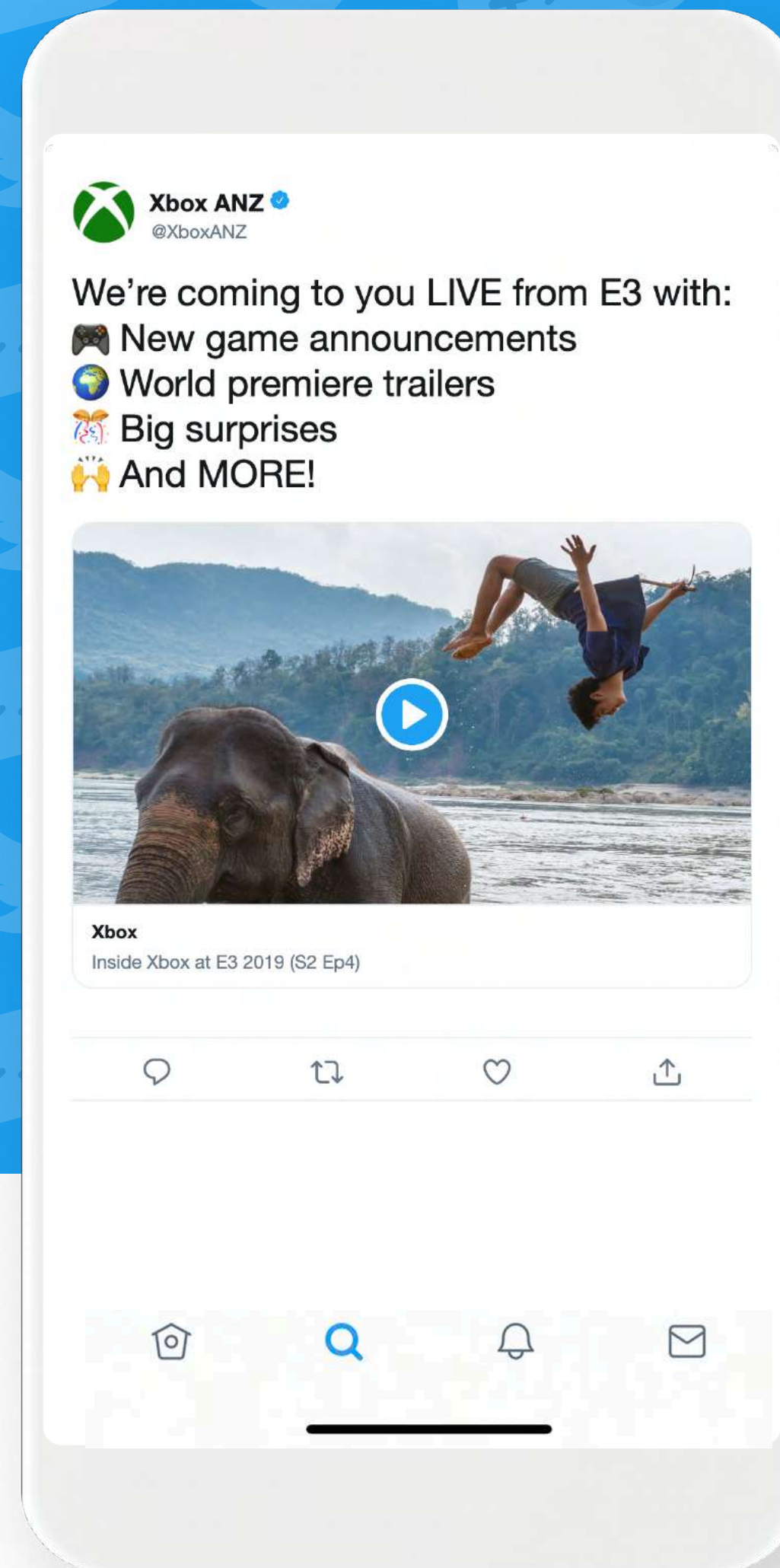
Challenge: Generate Brand Awareness, Increase  
Brand Affinity, Connect with growing network of  
gamers







First View



Auto Reply



Promoted Trend





# Xbox's Successful Results

Drive real-time engagement during E3 2020

**Benchmark Rate**

**+30%**

**Overall Sentiment**

**+2x**

**Share Voice**

**+20%**





Thank you.  
@martynuren

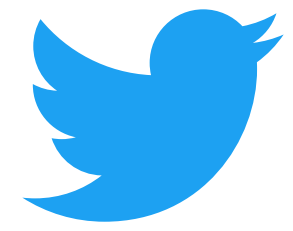




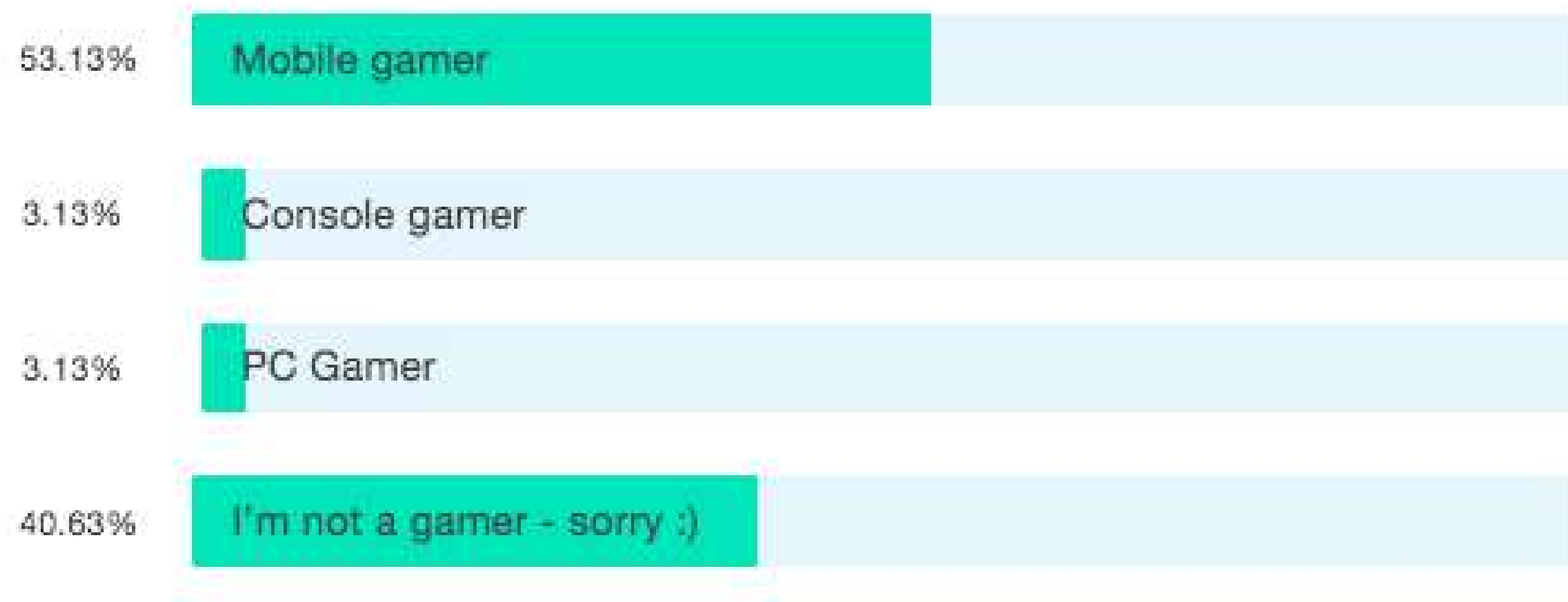
# Poll: What kind of gamer are you?

- Mobile gamer
- PC gamer
- Console gamer
- I'm not a gamer - sorry :)





# Poll: What kind of gamer are you?







# Q&A Time







Thank you!





# Decoding The Gaming Audience

MMA Webinar Series  
June 15, 2020

In Partnership with:

