

## **South Asia Mobile Gaming - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The South Asia Mobile Gaming Market is expected to register a CAGR of 8.5% during the forecast period.

#### Key Highlights

- The key factors fuelling mobile gaming growth in the region are accessibility and technological advancement. The gaming industry is changing its attention to mobile-first to accommodate players' modern on-the-go lifestyles. This includes gaming studios that had previously focused solely on PC development has shifted their focus to mobile. They don't have to deteriorate the game quality because of the updated smartphone technology and software developments. As a result, mobile versions of some of the most popular PC and console games are now available. South Asia region is one of the dominating markets for smartphones for which mobile gaming in the region is increasing. For example, due to the significant concentration of younger smartphone owners in Vietnam, the social video platform Tik Tok is already experimenting with mobile games with users. In addition, Incredible speeds (20 times 4G) and low latency were possible with 5G. (20 ms to 5 ms). As a result, the market is seeing an increase in AAA-quality mobile games with high production values.
- People in the region choose to watch and play sports online because mobile eSports is expected to be one of the most important aspects of the growth of the mobile game market in the region. For example, because of mobile gamers' explosive expansion, several publishers have shifted their focus to creating more accessible games that foster a sense of community among players. Tencent's PUBG Mobile is one such game that has gained a devoted audience. PUBG Mobile has created a dedicated community with good contact in the region. In addition, Esports at the 2021 Southeast Asian Games were held in the National Convention Center in Hanoi, Vietnam. It will be the second time the International Olympic Committee has sanctioned an esports tournament as a medal event in a multi-sport competition.
- Cloud gaming has eliminated the need for frequent hardware updates, allowing gamers worldwide to play cloud games on their current devices and future devices that may have poor specs but can play cloud games. The biggest opportunity for vendors in

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the market is to reach out to smartphone gamers, who make up a sizable portion of the gaming audience and prefer to play PC and console games on their phones. For example, Microsoft's Xbox Game Pass subscription program encompasses PC, mobile, and cloud gaming. It is now available in Indonesia, Malaysia, Thailand, and Vietnam. It shows the growth potential of the South Asia Mobile gaming market.

- User retention for mobile gaming in the region is a major challenge for the game developer. Bugs, a lack of gamification, a difficult UI, better alternatives, and so on are some of the most typical reasons. In the case of games, gamers can quickly become bored with a certain sort of game. The developers must keep adding new stages, characters, and design features to the game regularly, which is a very difficult task because of the fluctuating customer demand.

- All the countries in the region were under lockdown during the pandemic to prevent the COVID 19 f. Because of this, there has been a huge increase in the consumption of digital entertainment, particularly mobile games. In the COVID-19-affected markets, major gaming suppliers have significantly increased downloads of various mobile games.

## South Asia Mobile Gaming Market Trends

The growth of eSports in the region is driving the Mobile Gaming Market in South Asia Region.

- South Asia's rapidly rising internet population and high smartphone penetration have aided the emergence of mobile esports, inspired by the region's younger demographic. Infrastructure and internet access will help support the region's growing gaming industry. Companies are also encouraged to keep gamers in the region. For example, BreederDAO is an esports firm that helps players breed the strongest NFTs in play-to-earn games. In contrast, AcadArena helps student gamers in South Asia compete globally.

- The trend of providing esports infrastructure in the region is remarkable. Technological advancement, 5G technology, and Emerging economies are fuelling the growth, and even hotels are built according to the esports gaming theme. For example, The SEM9 Senai Esports Hotel is in Senai, Johor, Malaysia, and offers beautiful accommodations with the most up-to-date mobile gaming technology. This shows the market potential for mobile gaming in the region.

- Thailand's Digital Economy Promotion Agency (DEPA) is working to promote the Thai gaming industry to grow and create new jobs while also stimulating economic growth. The Tourism and Sports Ministry and Thailand's Sports Authority (SAT) have teamed with Garena Online Thailand to strengthen the country's e-sports business and establish Thailand as an e-sports tournament hub in ASEAN. According to the minister, the e-sports business in ASEAN was worth USD 39 million in 2020 and is predicted to grow to USD 72 million by 2024 as people spend more time playing online games.

- The region is witnessing various mergers and acquisitions in the esports sector, positively impacting the South Asia Mobile gaming market. For example, Ampverse, an esports company based in Singapore, has raised USD 12 million in Series A funding headed by Falcon Capital. Based on statistics from Pitchbook and other third-party sources, the firm claims that this is the largest Series A raised by an esports organization in South Asia. The funds will be used to expand Ampverse's play-to-earn business in Indonesia and the Philippines, as well as to acquire new esports teams and scale the company's play-to-earn unit.

- In addition, Skylightz Gaming, a gaming and esports company based in Singapore, has announced its aspirations for India. By financing USD 150,000 by FY22, the company hopes to enable massive effect and growth for all Indian esports players. With the expansion in India, it hopes to give international exposure to the rising esports talent across the country. Skylightz Gaming's investment will be used to provide players with new devices, boot camps, and studios for post-production purposes and practices. The gaming corporation supports multiple esports teams in Indonesia with great BGMI experience. Because of this development in esports, the South Asia Mobile Gaming market will grow exponentially.

5G network and increasing usage of smartphones in the region are driving the mobile gaming market in the South Asia region.

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- With the initial Razer Phone, the American-Singapore tech company Razer attempted to bring gaming to a mobile device. This was a particularly excellent initial try. The phone, on the other hand, has several serious problems. As a result, the Razer Phone 2 was released after the business addressed some of the shortcomings of its first product. Under the hood, the second iteration has additional power. However, it is aimed squarely at mobile gamers. The phone sports an Ultra Motion IGZO display with HDR support. It also features a 120Hz refresh rate. This will help the mobile gaming market to grow in the region.
- The increasing rate of 5G adoption in the region makes phones more suitable for gaming and directly drives the mobile gaming market in South Asia. Companies in the region are also partnering with telecom providers to implement 5G. For example, Taiwan Mobile (TWM) has chosen Nokia to provide technology to support its growth strategy to expand 5G coverage across the country.
- In addition, TWM's spectrum assets, which comprise the 700MHz and 2100MHz bands, will also benefit from the introduction of 4G/5G dynamic spectrum sharing. Nokia will assist the operator in modernizing its LTE infrastructure and consolidating network management and optimization into a single solution for improved 4G/5G RAN network performance. This improved network performance will be helpful for mobile gaming's smooth functioning and ultimately drive the mobile gaming market in South Asia.
- With a new cloud gaming service announced by Singapore-based telco Star Hub, it is now feasible to play high-end video games on the go and on low-end smartphones. Gamers on the go can benefit from the new service by playing on 5G mobile networks, which are predicted to have less lag than 4G. This results in a more smooth and responsive gameplay experience.
- Many gaming production companies have transformed their businesses by prioritizing launching games for mobiles. For example, Hyper Front, a mobile-optimized first-person shooter, is now available in the Google Play Store for users in the Philippines, Thailand, Malaysia, and Singapore. This can be understandable by the growth of mobile gaming in the South Asia region.

#### South Asia Mobile Gaming Industry Overview

The South Asia Mobile Gaming Market is highly fragmented as the demand for online games. The companies are involved in various strategies such as product innovation, service innovation, mergers, and acquisitions to remain ahead of the competition and expand their reach.

- MAY 2022: There's no denying that mobile gaming is huge in South Asia. Many firms are attempting to enter the mobile gaming market, such as EA's recently released Apex Legends Mobile, which is free-to-play, accessible, and easy on our pocket money. Sony now wants a piece of the action as well.
- May 2022: Players from South Asia will be able to join the fight against the Burning Hells in Diablo Immortal, according to Blizzard Entertainment. Diablo Immortal will be available on iOS and Android in Indonesia, Malaysia, the Philippines, Singapore, and Thailand. Diablo Immortal has cross-play and cross-progression, allowing Sanctuary's heroes to fight alongside one another regardless of platform and to transition between mobile and PC games easily.
- April 2022: Malaysia Digital Economy Corporation (MDEC), Malaysia's leading digital economy agency, and Larian Studios, an industry partner, hosted a 10-day fact-finding mission for the Howest University of Applied Sciences Digital Arts and Entertainment (DAE) program team to explore potential collaboration with local universities and industry players to elevate game development education and the broader ecosystem holistically.

#### Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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