SCOTTS
INTERNATIONAL

Southeast Asia Gaming - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 120 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License $4750.00
- Team License (1-7 Users) $5250.00
- Site License $6500.00
- Corporate License $8750.00

Report description:

Southeast Asia Gaming Market Analysis

Southeast Asia gaming market size in 2026 is estimated at USD 14.86 billion, growing from 2025 value of USD 14.83 billion with 2031 projections showing USD 15 billion, growing at 0.19% CAGR over 2026-2031. Robust user engagement continues, yet saturated addressable audiences, tightening regulations, and currency volatility restrain top-line expansion. Mobile titles retain primacy as 5G coverage improves playability and cloud-based delivery, but low-spec devices cap average revenue per user and limit premium content uptake. Localized payment ecosystems anchored in digital wallets and carrier billing reduce friction for micro-transactions and help offset credit-card under-penetration. Intensifying rivalry among regional champions such as Garena and global publishers, including Tencent and NetEase, accelerates content localization, esports sponsorship, and hybrid monetization experiments. Government esports programs and tax incentives spur professionalization, though compliance costs and content-approval delays temper immediate returns.

Southeast Asia Gaming Market Trends and Insights

Rising Mobile-Internet Penetration and Affordable Smartphones

Indonesia achieved 99.4% smartphone adoption among internet users by 2024, with 96% of players favoring mobile titles. Budget Android devices priced below USD 150 broadened gamer demographics, bringing Vietnam's user base to 54 million and sustaining 9% annual growth. Publishers respond by optimizing asset size, frame rates, and battery consumption to accommodate entry-level hardware, ensuring reach but limiting premium graphics and monetization depth. Lightweight builds cut data costs and improve playability on 3G fallback connections, reinforcing the Southeast Asia gaming market's mobile-first orientation. Yet low disposable income segments restrain in-app purchase intensity, keeping ARPU below USD 15 across most markets. Device vendors collaborating with telcos on gaming-bundled data plans aim to elevate engagement and nudge users toward higher-end handsets.

5G Rollout Enabling Low-Latency Competitive Gaming

Malaysia's 5G network covered 80.2% of the population by December 2024, boosting median download speeds to 105.36 Mbps from 45.57 Mbps a year earlier. Singapore ranks among Asia's fastest for mobile throughput, while Thailand's 5G footprint spans over 90% of urban centers. Low-latency connectivity cuts lag to sub-30 ms, a threshold critical for MOBA and battle-royale esports. TM Global deployed edge facilities to shrink server round-trips, demonstrating 40% latency reduction in pilot cloud-gaming sessions. Telcos bundle data-free game passes and co-host tournaments to popularize 5G services. Rural coverage gaps and spectrum-auction delays in Indonesia temper uniform gains, but government digital-inclusion mandates aim to close disparities by 2027.

Low-Spec Device Base Limits High-Fidelity Titles

Entry-level smartphones with 3 GB RAM or less still account for 52% of handsets in Indonesia and the Philippines. Developers invest in asset-streaming and adaptive-resolution technology to maintain playability, but visual downgrades dilute potential for premium cosmetics and season-pass upselling. Testing matrices encompass over 600 device models, inflating QA budgets by up to 35%. The constraint sustains dominance of casual and hyper-casual genres, keeping average session times under 30 minutes and depressing ad-view CPMs. Hardware upgrades will occur gradually as income levels rise, but near-term monetization upside remains capped.

Other drivers and restraints analyzed in the detailed report include:

Increasing Adoption of Digital Wallets and Carrier BillingGovernment Support for Esports and Tax IncentivesStringent Content Regulations and Approval Delays

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Mobile titles generated 70.78% of 2025 revenues, confirming the Southeast Asia gaming market dependence on handheld devices. The segment still posts mid-single-digit user growth as rural smartphone diffusion progresses, but monetization intensity plateaus. Cloud gaming, although only 1.8% of revenue, records the fastest 0.95% CAGR, benefitting from 5G rollouts and edge-compute partnerships. The Southeast Asia gaming market size for cloud services is projected to surpass USD 365 million by 2031, translating to 2.43% of overall spend. Hybrid models allowing session hand-off between mobile and cloud strengthen retention. PC cafe revenue slips amid higher electricity prices, yet cafes reposition as esports arenas, drawing sponsorship from peripheral brands. Console adoption lags due to USD 400+ hardware pricing and limited official distribution channels, though gray-market imports feed niche enthusiast communities.

Hardware subsidies tied to telco contracts and cloud-streamed console libraries attempt to lower the entry barrier. Content strategy increasingly revolves around cross-platform progression, letting players grind on mobile and enjoy premium visuals in the cafe or at home. Publishers leverage cloud-rendered demos to market upcoming mobile ports, reducing APK download friction and highlighting flagship experiences that were previously inaccessible to low-spec device owners.

The Southeast Asia Gaming Market Report is Segmented by Platform (Mobile, PC, Console, and Cloud/Game-Streaming), Revenue Model (Free-To-Play, Premium/Pay-to-Play, Subscription, and More), Game Genre (MOBA/Strategy, Shooter and Battle Royale, Role-Playing Games, Casual and Puzzle, and More), and Country. The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Asiasoft Corporation Public Company Limited IGG Inc. Com2uS Holdings Corporation Netmarble Corporation Tencent Holdings Limited Bandai Namco Entertainment Asia Pte. Ltd. Sea Limited Nintendo Co., Ltd. Sony Group Corporation NetEase, Inc. VNG Corporation Garena Online Private Limited Gravity Co., Ltd. Sky Mavis Pte. Ltd. Shanghai Moonton Technology Co., Ltd. Electronic Arts Inc. Activision Blizzard, Inc. Ubisoft Entertainment SA Square Enix Holdings Co., Ltd. Supercell Oy Rovio Entertainment Corporation Roblox Corporation Epic Games, Inc. Valve Corporation Riot Games, Inc. KRAFTON, Inc.

Additional Benefits:

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

Table of Contents:

Southeast Asia Gaming - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 120 pages | Mordor Intelligence

To place an Order with Scotts International:

- - Print this form
- - Complete the relevant blank fields and sign
- - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	$4750.00
	Team License (1-7 Users)	$5250.00
	Site License	$6500.00
	Corporate License	$8750.00
	VAT	
	Total	

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-02-26
		Signature	

Scotts International. EU Vat number: PL 6772247784
tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com

Scotts International. EU Vat number: PL 6772247784
tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com