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A Behavioral Analysis of Mobile Gamers

VIETNAM, PHILIPPINES, INDONESIA AND
THAILAND

POKKT X DECISION LAB - AUGUST, 2018

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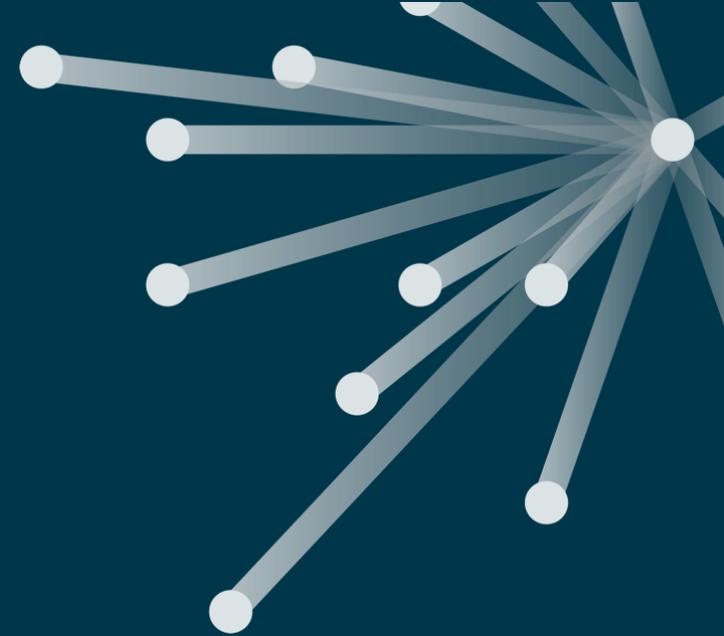
Background

With over 2 billion players worldwide* and 1.1 billion players in APAC* alone, games have proven their popularity. At the global level, gaming market is predicted to grow continuously in the next couple of years. Together with the rapid increase of mobile users, it is believed that mobile games will take a significant share of the gaming market, as well as of total time spending on mobile.

Capitalizing on the growing of mobile games, POKKT is promoting in-game mobile advertising. The in-game advertisement is believed to bring multiple benefits, including the ability to capture the attention of players to the ads and the variety of ad formats provided. However, the lack of data about mobile game penetration and its ability to capture users' attention creates challenges for POKKT to sell the concept to advertisers.

Decision Lab is honored to provide fact-based answers, helping POKKT to clear the concern of advertisers: "Do mobile games have the potential to reach and capture the attention of my target audiences (TA)?"

(* Source: NewZoo Global Game Market Report 2017)

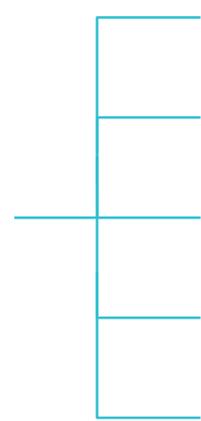


Decision tree



BUSINESS CHALLENGE:

Do mobile games have the potential to reach and capture the attention of my target audiences (TA)?

- 
- A decision tree diagram consisting of a vertical line on the left that branches into five horizontal lines, each pointing to a question. The lines are light blue.
1. Who can I reach if I serve my ads inside the game apps?
 2. Where and when can I catch those gamers?
 3. How much facetime can I have with those gamers?
 4. What types of ad and ad content should I serve to gamers?
 5. What can I do to engage gamers with my ads?

Methodology



Our research methodology⁽¹⁾



Online interview

Advantages of using online survey: wider coverage, faster reporting, respondents can complete at their convenience.



Mobile-first survey

Our research shows the use of mobile is surpassing the big screen. Therefore, we design our surveys to be mobile first.



Trusted sources

Respondents were invited from Decision Lab online community, which consists of people who want to share their opinions.

⁽¹⁾ Please refer to the appendix for a detailed explanation of the methodology

Areas of investigation

MOBILE GAMES MARKET

- How many people play mobile games on a daily basis?
- Who are those players?

GAMER BEHAVIORS

- Which categories of mobile games do people often play?
- On which devices do they often play?
- When and where do they play?
- How often do they play?
- How much time do they usually spend on one game?
- What else are they doing while playing mobile games?

ADVERTISING IN GAMES APPS

- How do players react to in-game advertising?
- Which types of ad are preferable?
- After seeing the in-game ads, what actions will come next?
- What types of campaigns (i.e. branding vs. promotion) are more suitable for in-game advertising?
- What is the role of rewards?

Report terminology

- Mobile Games:
 - Games that are played in-app on mobiles or tablets and do not require advance skills
- Gamers:
 - Play games in-app on mobiles or tablets
- Non-Gamers:
 - Don't play games at all or
 - Don't play games on mobiles nor tablets or
 - Don't play games in-app on neither mobiles nor tablets
- Penetration/Mobile Game Penetration:
 - % of people who have internet connected devices and play mobile games



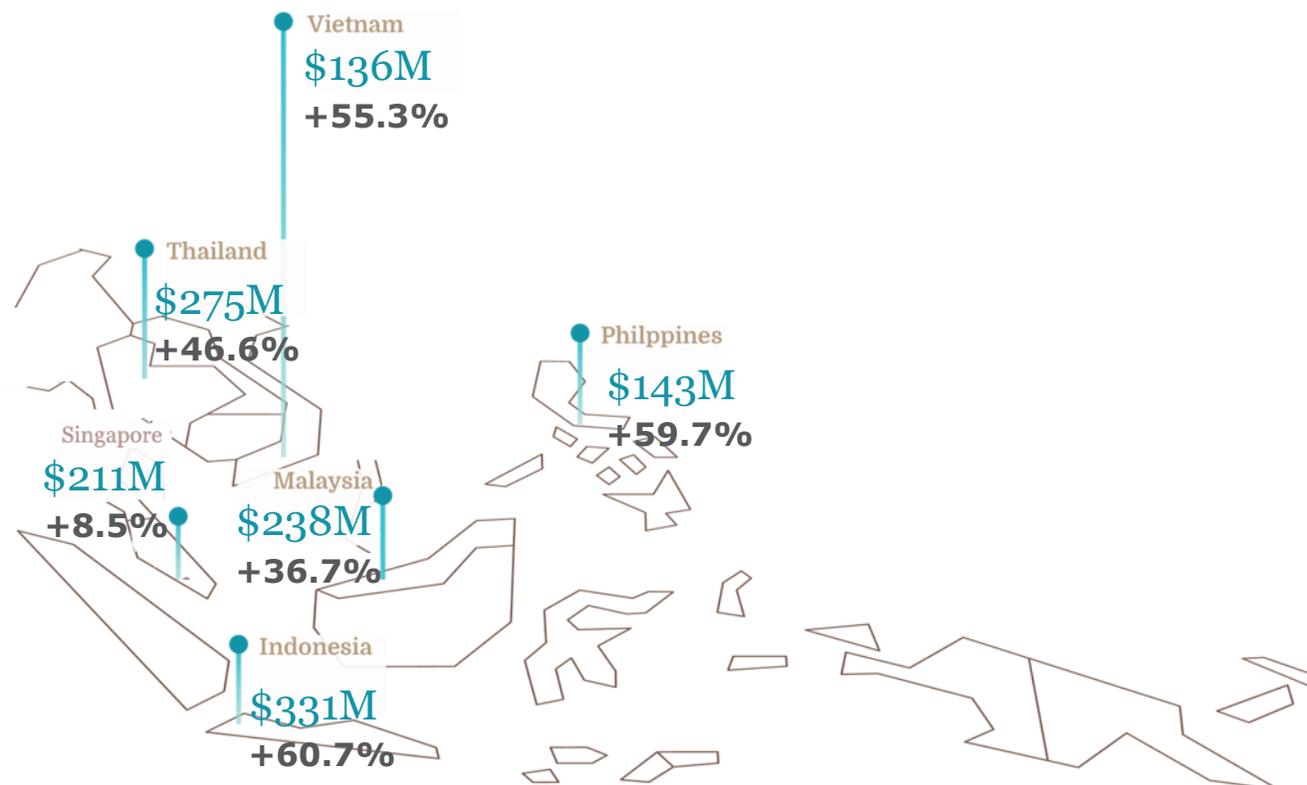


Mobile games in SEA

The fantastic four: Indonesia, Philippines, Vietnam, Thailand and Malaysia

Mobile Games Revenue in South East Asia Region growth with the astonishing rate.

An impressive growth rate of 60.7% made Indonesia defeated Singapore to be the biggest market for mobile games. Following the growth of Indonesia is Philippines, Vietnam, Thailand and Malaysia.



More than half of the online population play mobile games!

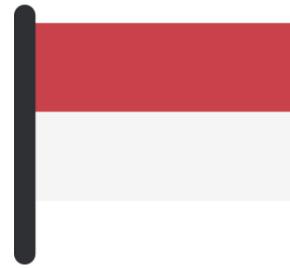
With Philippines and Thailand having the highest mobile penetration



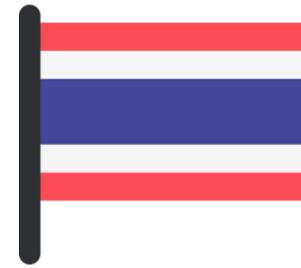
VIETNAM



PHILIPPINES



INDONESIA



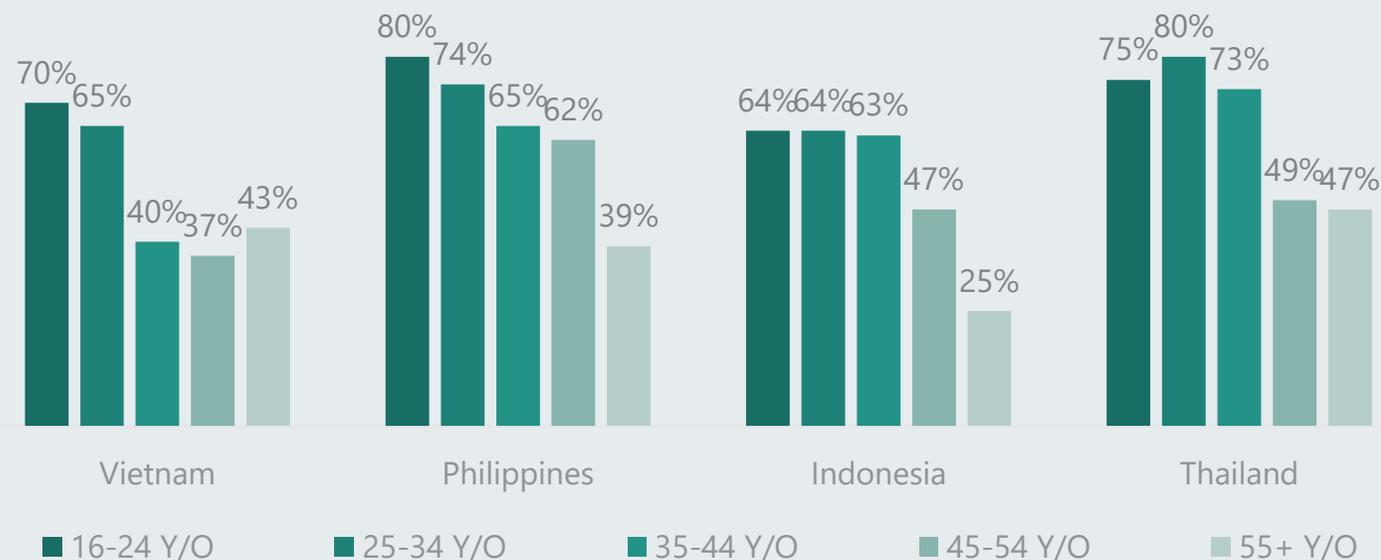
THAILAND



Mobile Games
Penetration (%)

Mobile games are popular amongst people up to the age of 44, with Vietnamese being the exception

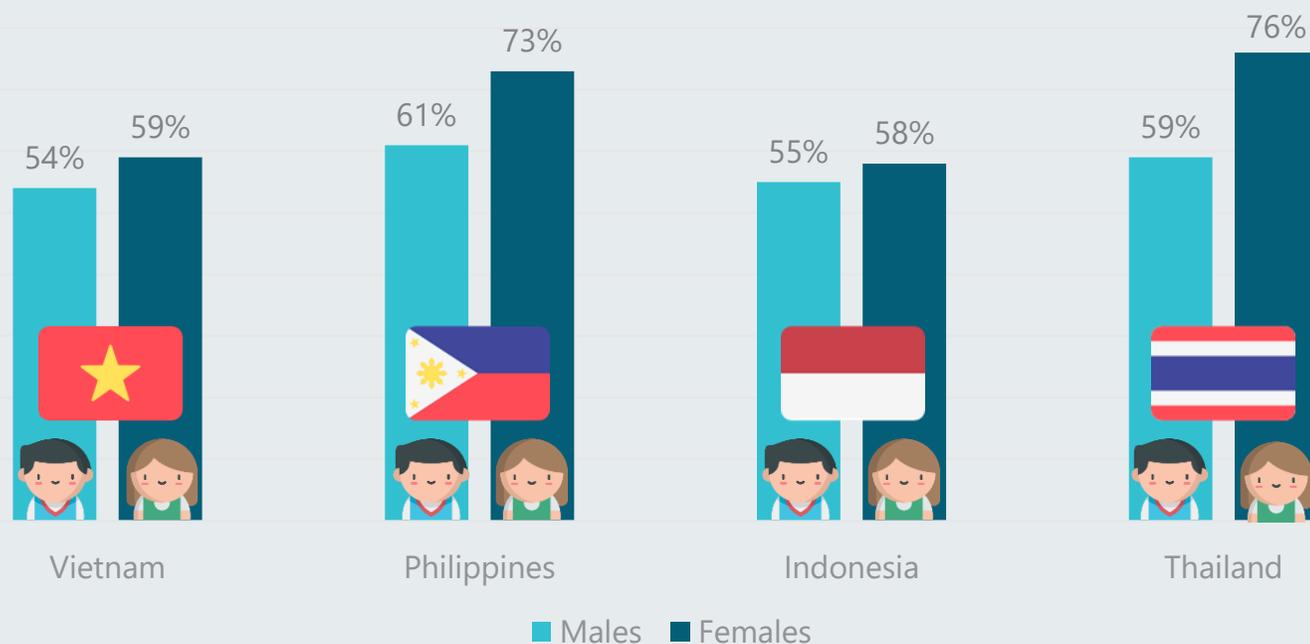
Mobile game penetration by age group



Mobile games penetration of people 35+ in Vietnam is significantly lower than that of the younger group. Meanwhile in Philippines, people 45-54 y/o are still inclined to play mobile games. In Indonesia and Thailand, the primary players are people from 16-44 y/o.

Thailand and Philippines mobile games penetration is driven by Females

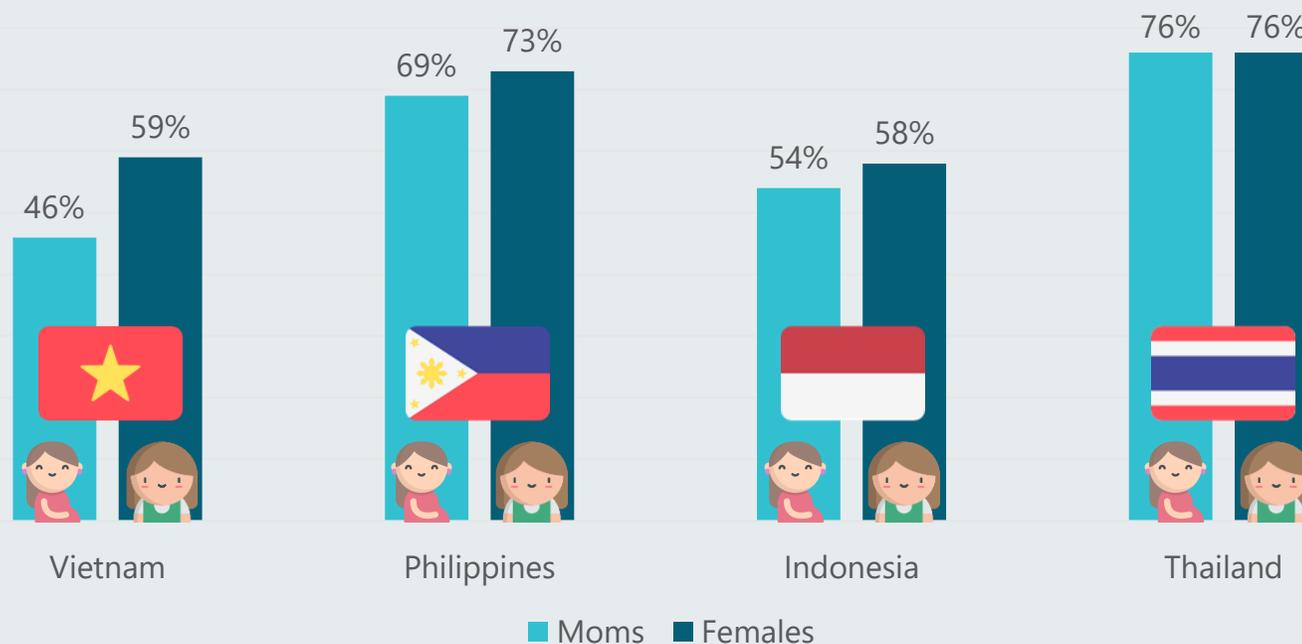
Mobile game penetration by gender



Mobile game penetration is higher for Females than Males, but the difference is more significant in Philippines and Thailand.

Moms are also playing mobile games, especially Thai moms!

Mobile game penetration Moms vs. Females



Vietnam is a unique market where mobile games are less popular amongst Moms than amongst Females. In other markets, the mobile game penetration between the moms and females are roughly equal.

They play casual mobile games, but they are hardcore!

Gamers spend nearly 1 hour each time they play.



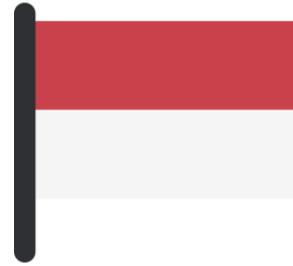
VIETNAM

51



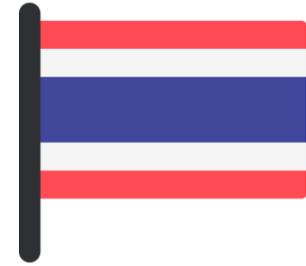
PHILIPPINES

58



INDONESIA

53



THAILAND

56

Average Time
Spent/Session (Mins)

Findings by country



Fast track to...



Vietnam



Indonesia



Philippines



Thailand

Vietnam



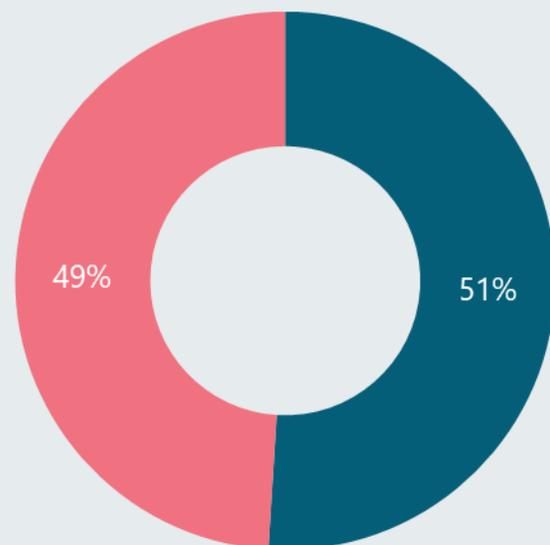
Advertiser question #1

WHO CAN I REACH IF I SERVE MY AD
INSIDE THE GAME APPS?



Gamer demographic

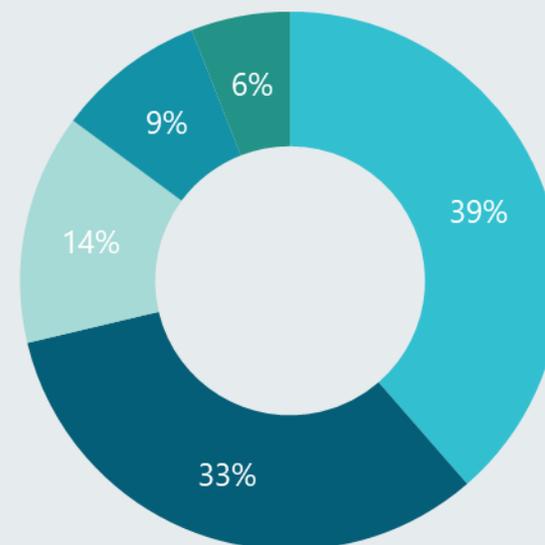
Gamers by gender



■ Males ■ Females

n = 480

Gamers by age groups



■ 16-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55+

n = 480



Mobile gamer penetration

Who are they?

GENDER



54%
Males are Gamers



59%
Females are Gamers

AGE GROUPS



70%

People 16-24
Y/O are Gamers



65%

People 25-34
Y/O are Gamers



40%

People 35-44
Y/O are Gamers

37%

People 45-54
Y/O are Gamers

43%

People 55+ Y/O
are Gamers

TARGET GROUPS IN HIGH DEMAND FOR ADVERTISERS



65%

Males
18-35 Years Old
are Gamers



73%

Females
18-35 Years Old
are Gamers



46%

Moms are Gamers

Moms as mobile gamers

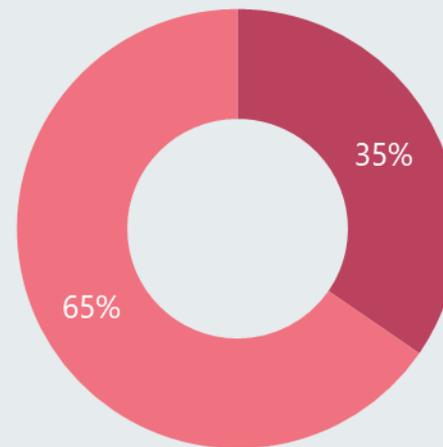
Penetration



46%
of Moms are
gamers

n = 174

Percentage of Moms in Females



■ Moms ■ Females

n = 234



Moms with Kids under 10 years old as mobile gamers

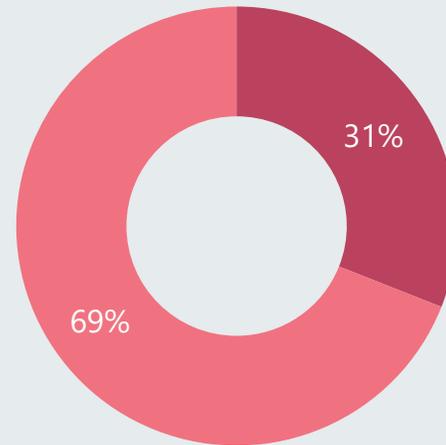
Penetration



53%
of Moms with
Kids under 10
years old are
gamers

n = 136

Percentage of Moms with Kids under 10 years old in Females



■ Moms ■ Females

n = 234

Millennials as mobile gamers

Penetration

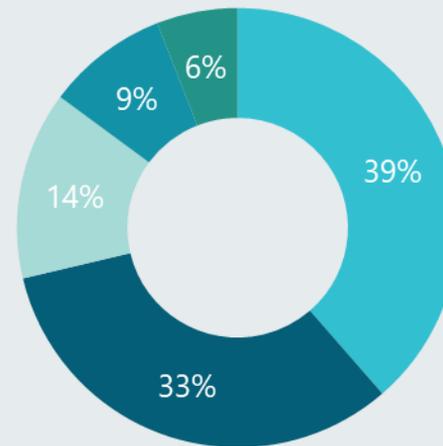
65%

of Millennials
are gamers



n = 241

Percentage of Millennials in mobile gamers



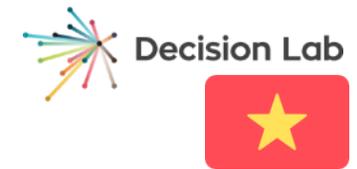
■ 16-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55+

n = 480

Advertiser question #2

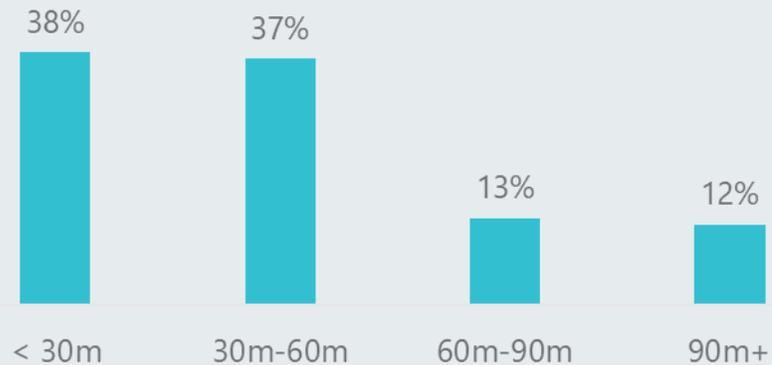
HOW MUCH FACETIME CAN I HAVE WITH
THOSE GAMERS?

Session Time - Overall



Time per each session

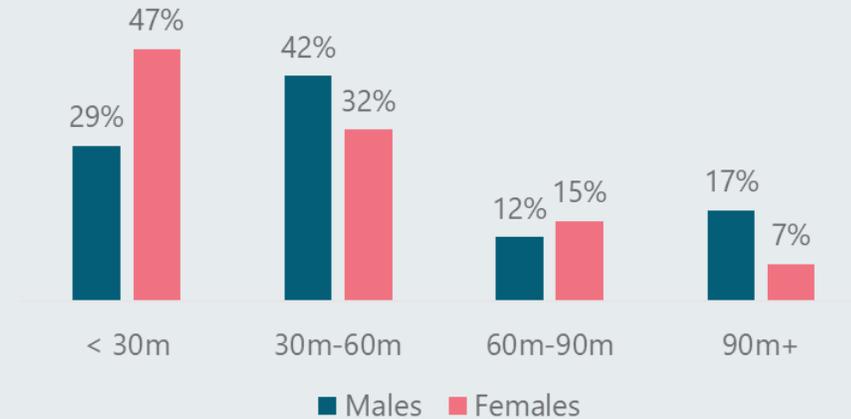
Average time/session:
51 minutes



(*) Q: On average, how much time do you spend playing on each session? n = 480

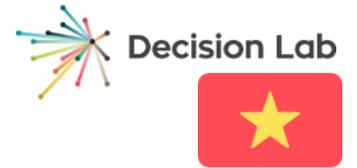
Time per each session by gender

Average time/session:
■ 56 minutes
■ 45 minutes

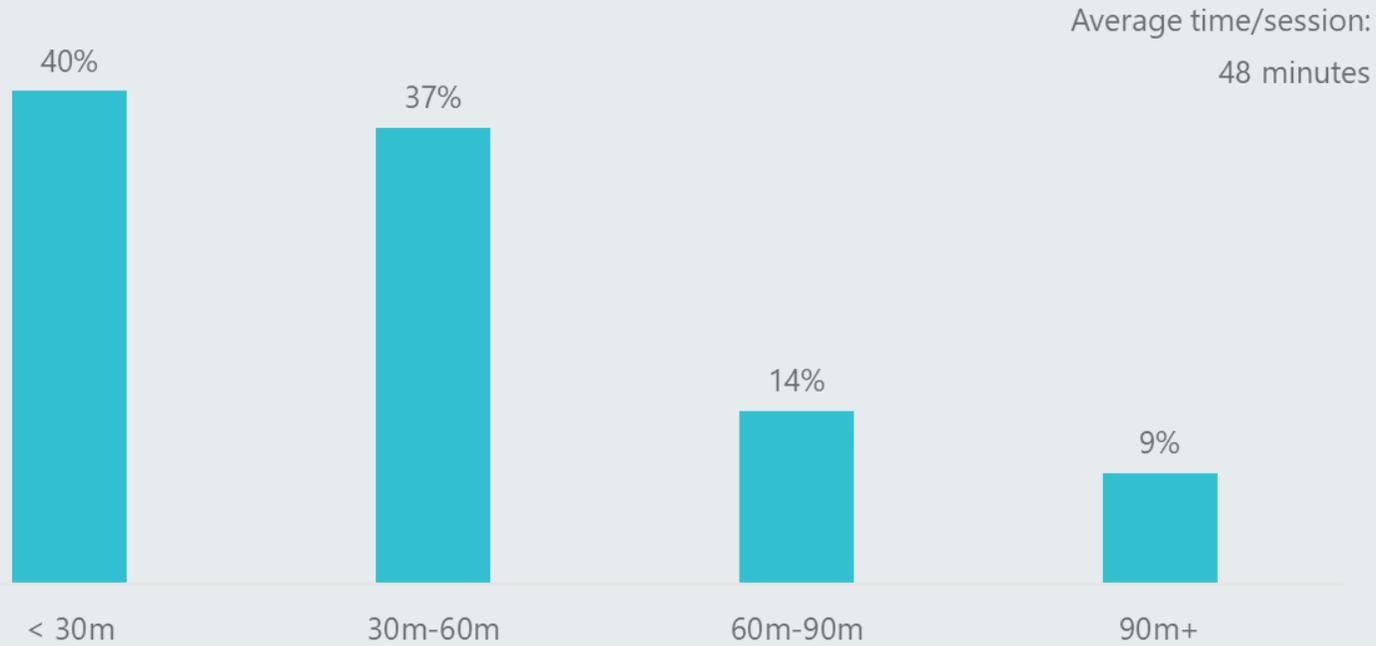


(*) Q: On average, how much time do you spend playing on each session? n = 480

Millennials – Session Time



Millennials – Session Time



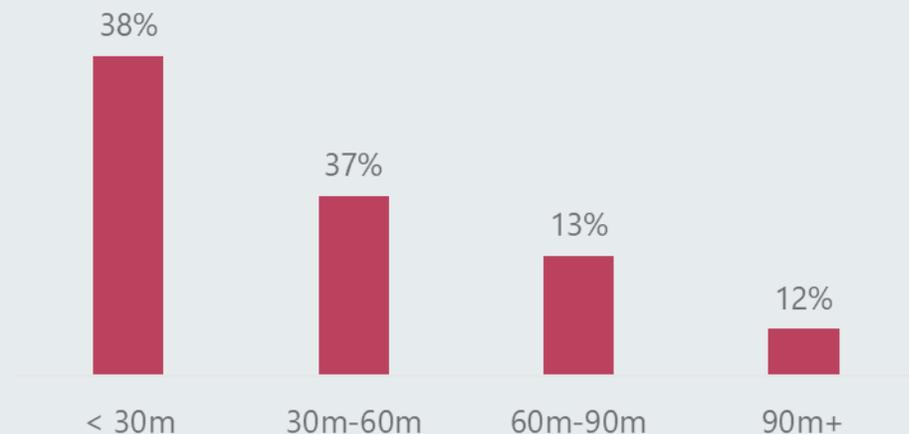
n = 157

Moms – Session Time



Time per each session of Moms

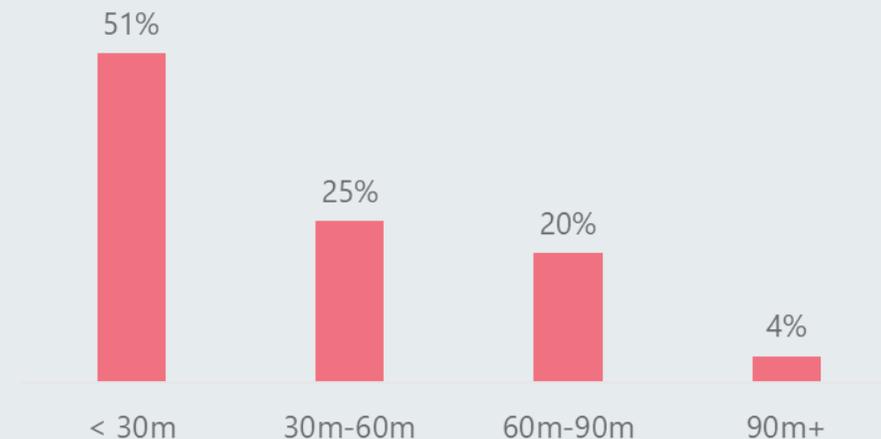
Average time/session:
45 minutes



(*) Q: On average, how much time do you spend playing on each session? n = 80

Time per each session of Moms with Kids under 12 years old

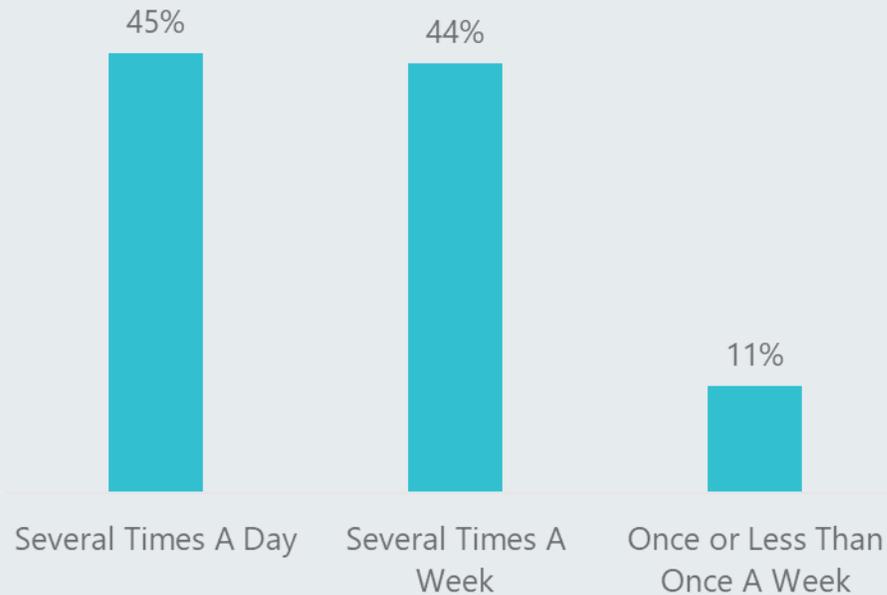
Average time/session:
43 minutes



(*) Q: On average, how much time do you spend playing on each session? n = 72

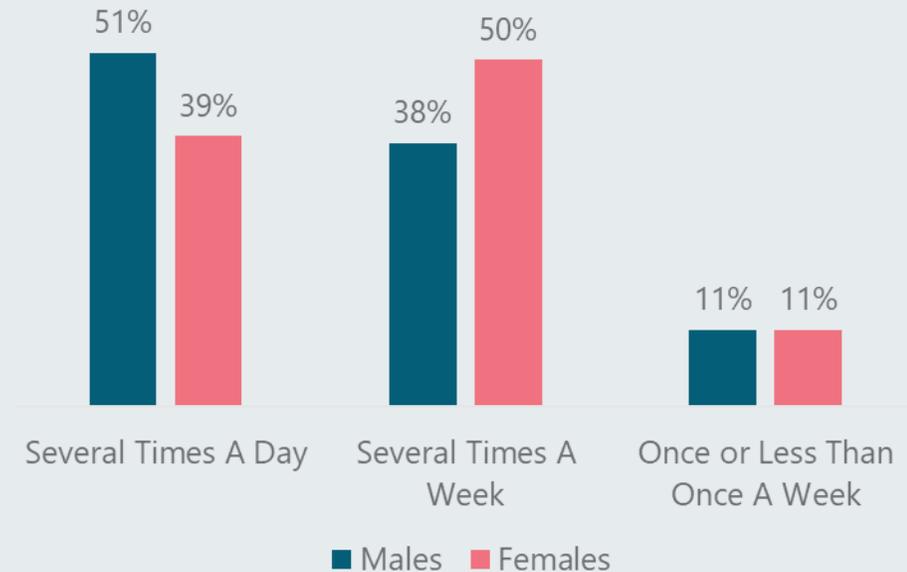
Frequency of playing

Play frequency



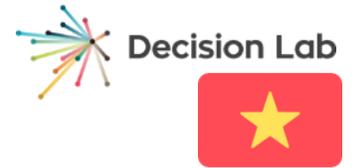
(*) Q: How frequently do you play games using apps on your mobile/tablets? n = 480

Play frequency by gender

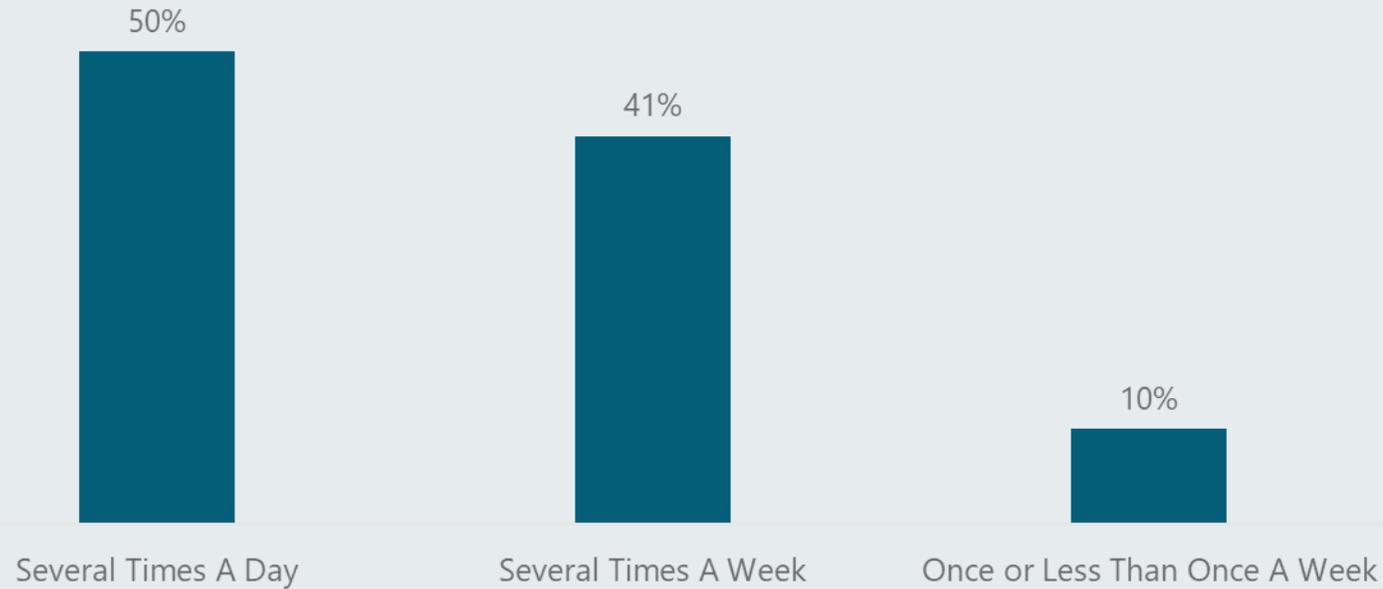


(*) Q: How frequently do you play games using apps on your mobile/tablets? n = 480

Frequency of playing of Millennials

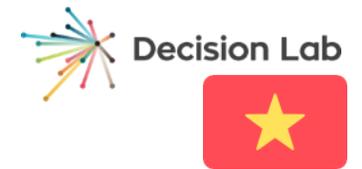


Play frequency of Millennials

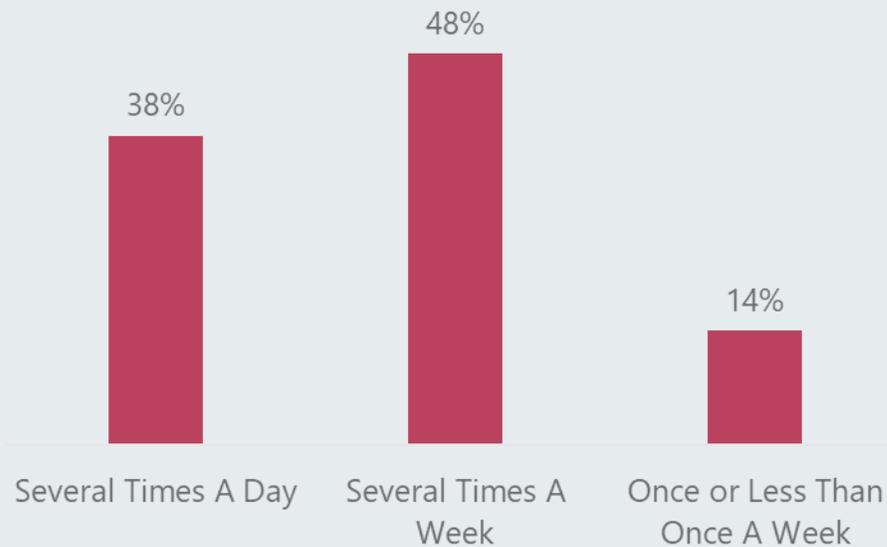


n = 157

Frequency of playing of Moms

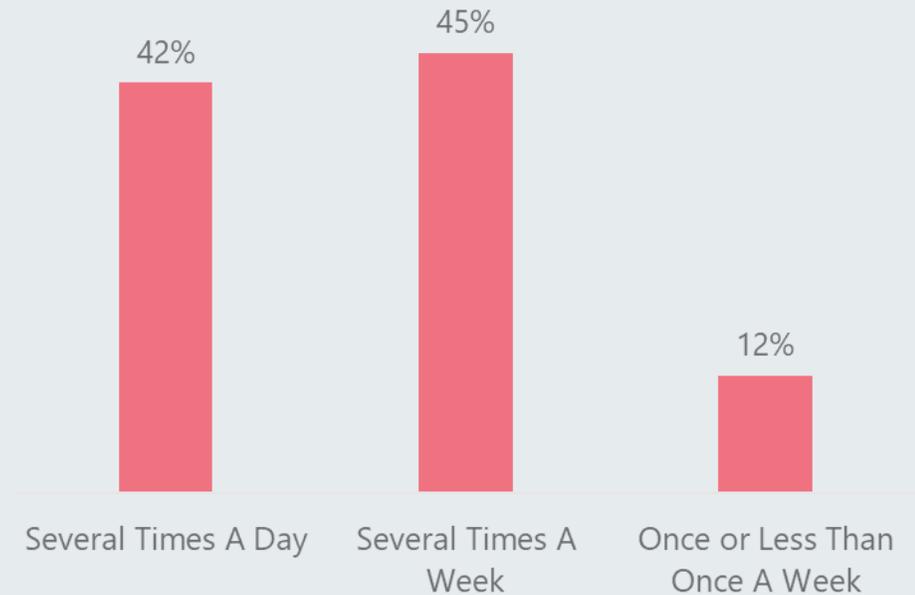


Play frequency of Moms



(*) Q: How frequently do you play games using apps on your mobile/tablets? n = 80

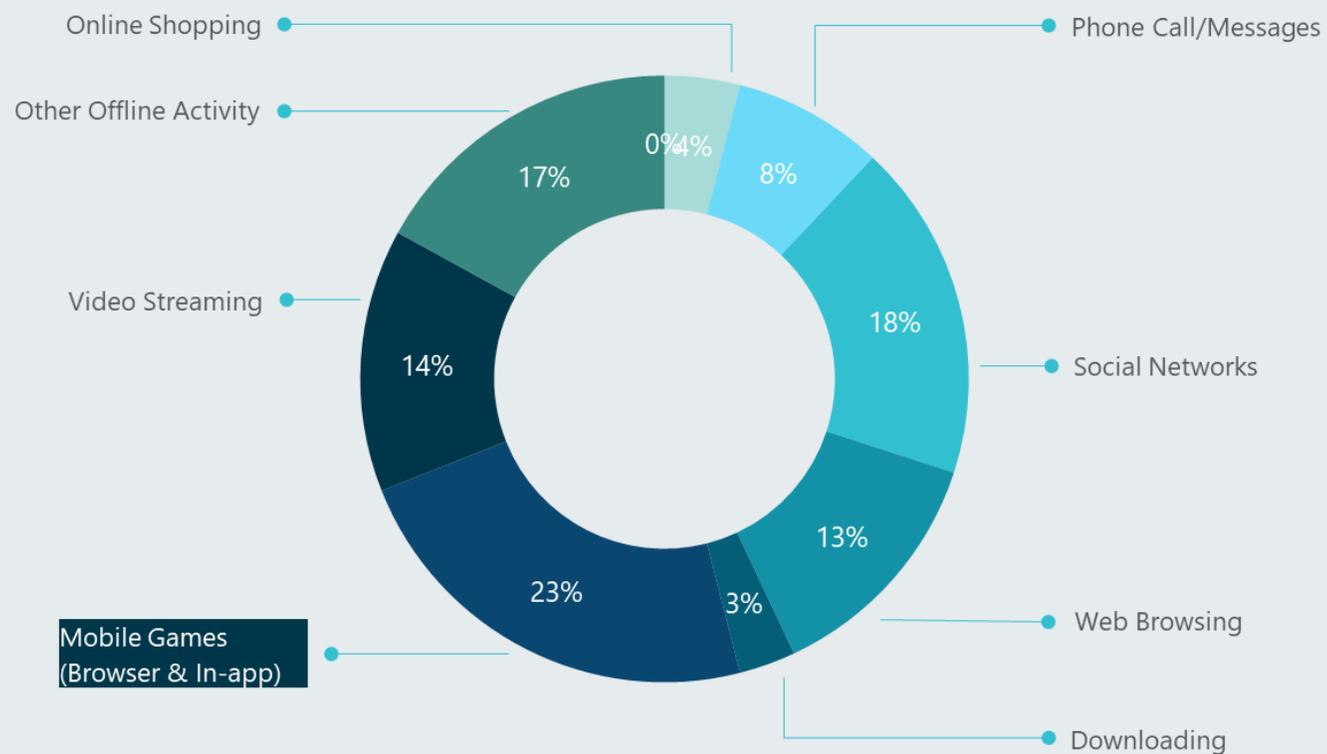
Play frequency of Moms with Kids under 10 years old



(*) Q: How frequently do you play games using apps on your mobile/tablets? n = 72



Share of time on mobile



Share of time on mobile

(*) Q: Thinking about the last 24 hours, how much time do you spend on your mobile for the following activities?

n = 480

Advertiser question #3

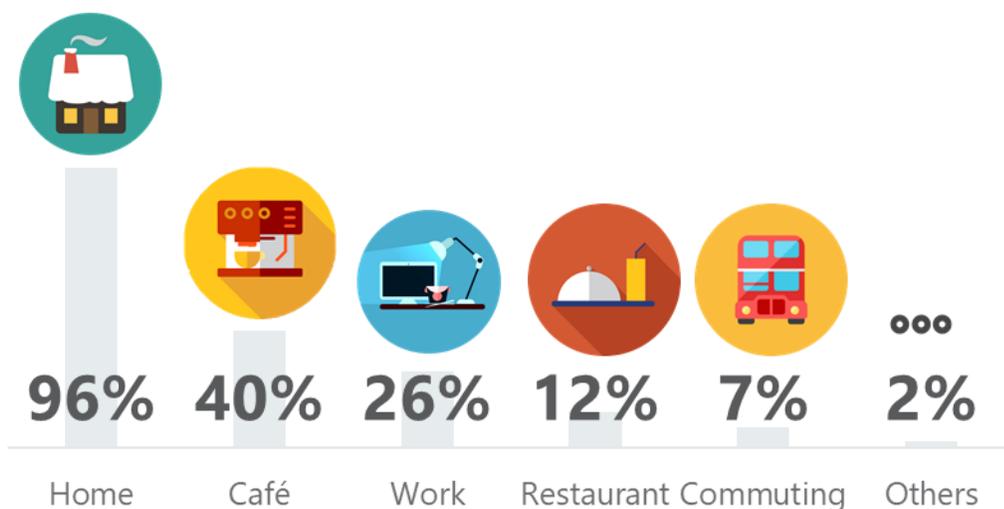
WHERE AND WHEN CAN I CATCH THOSE GAMERS?





Location and time of playing

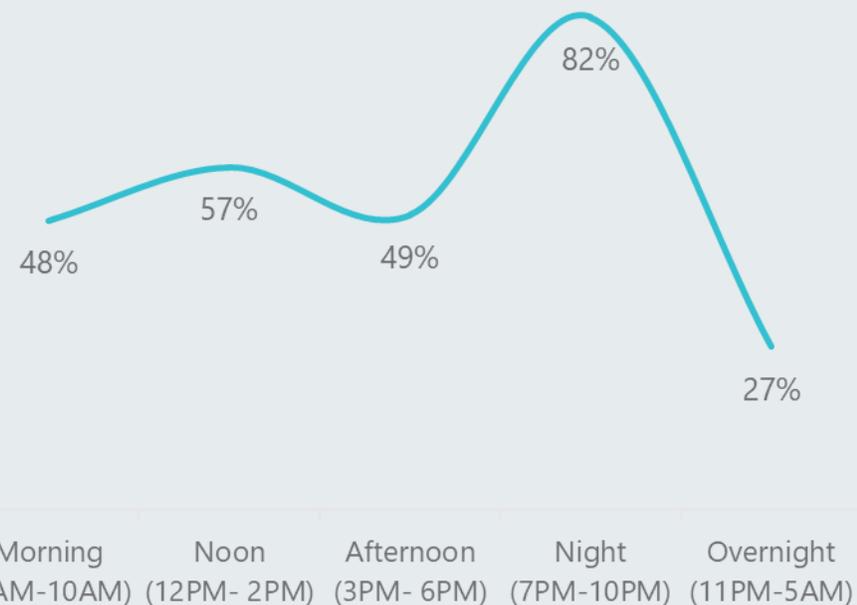
Location to play mobile games



(*) Q: Where are you when you open the game apps and play?

n = 480

Time of playing



(*) Q: At what time of the day do you play games in-app on mobile?

n = 480



Location and time of playing of Males

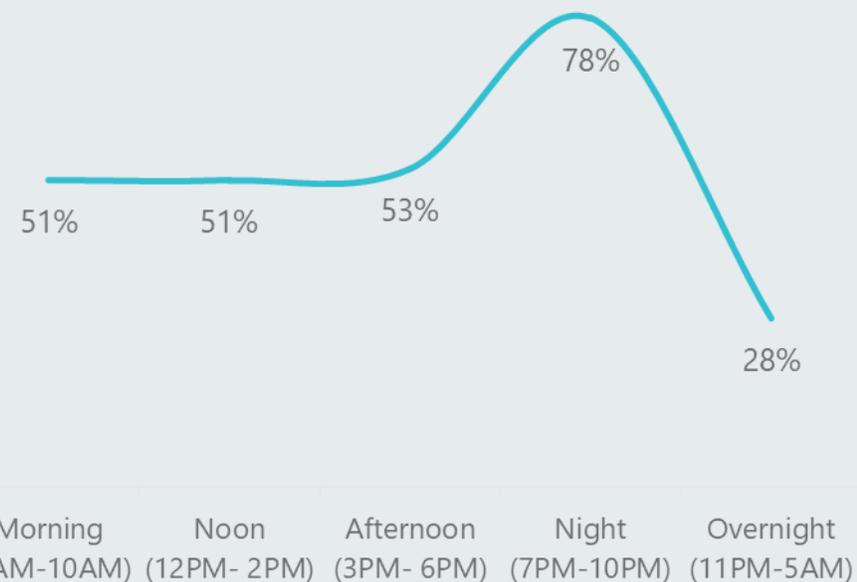
Location to play mobile games



(*) Q: Where are you when you open the game apps and play?

n = 247

Time of playing



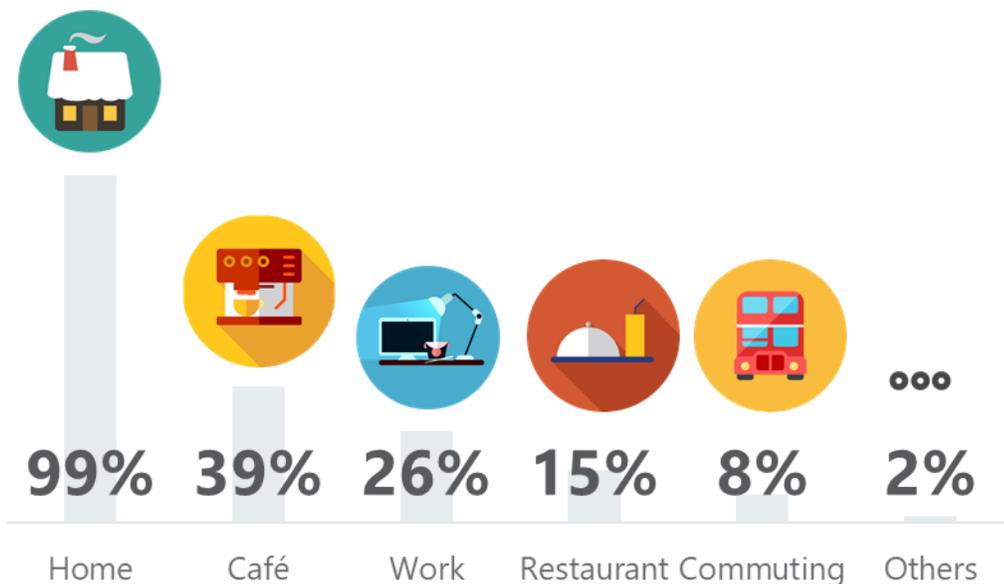
(*) Q: At what time of the day do you play games in-app on mobile?

n = 247



Location and time of playing of Females

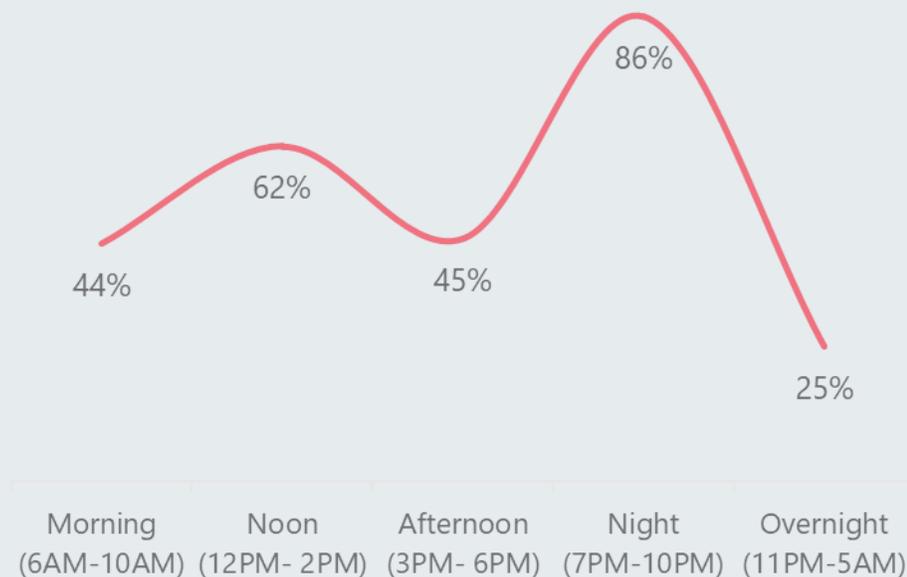
Location to play mobile games



(*) Q: Where are you when you open the game apps and play?

n = 234

Time of playing



(*) Q: At what time of the day do you play games in-app on mobile?

n = 234



Location and time of playing of Millennials

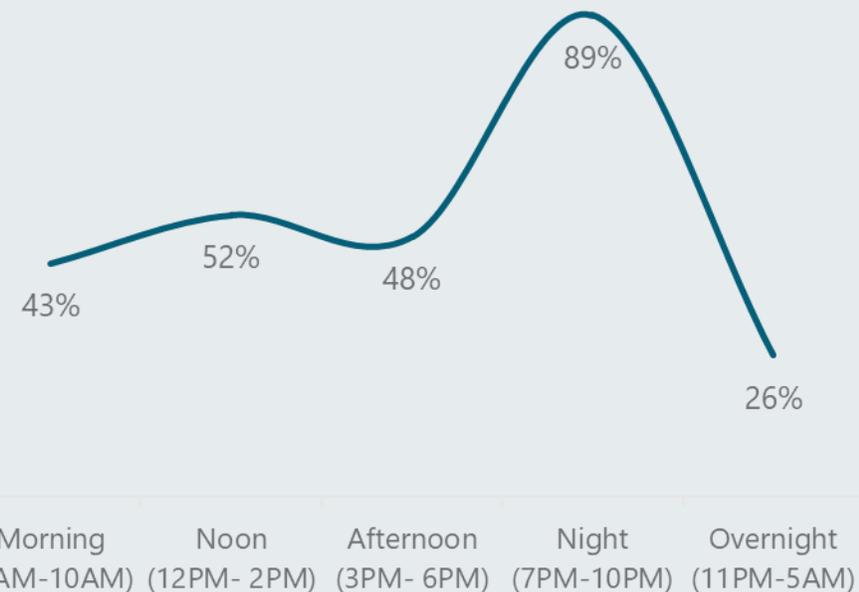
Location to play mobile games



(*) Q: Where are you when you open the game apps and play?

n = 157

Time of playing



(*) Q: At what time of the day do you play games in-app on mobile?

n = 157



Location and time of playing of Moms

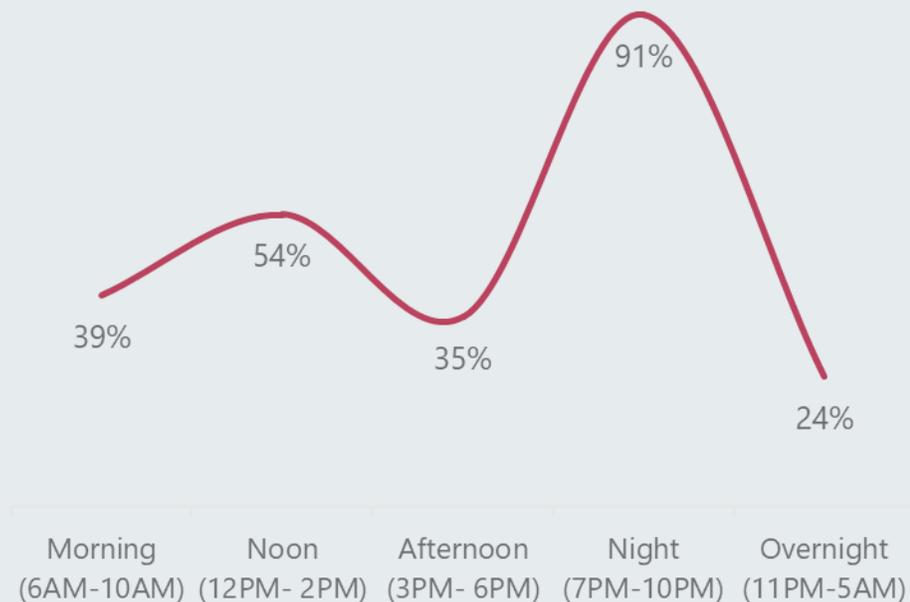
Location to play mobile games



(*) Q: Where are you when you open the game apps and play?

n = 80

Time of playing



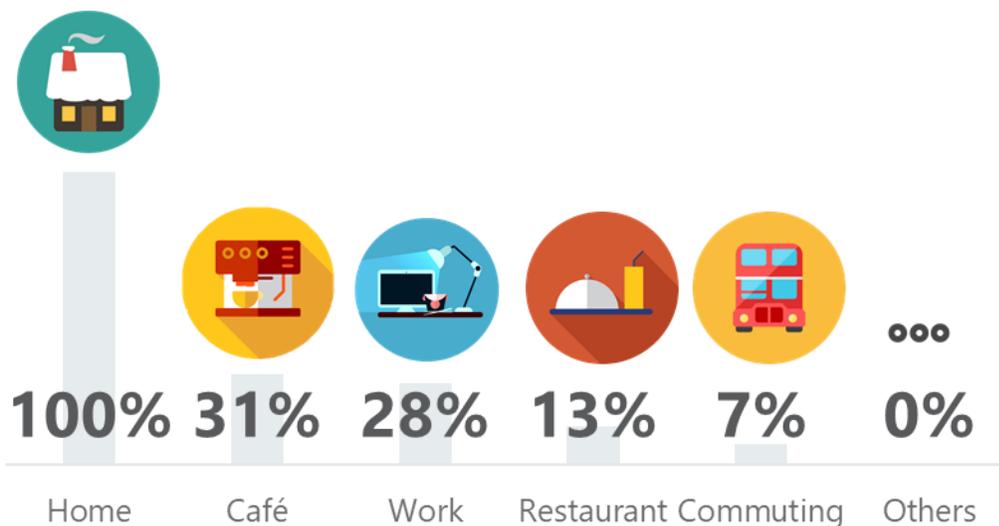
(*) Q: At what time of the day do you play games in-app on mobile?

n = 80



Location and time of playing of Moms with Kids under 10 years old

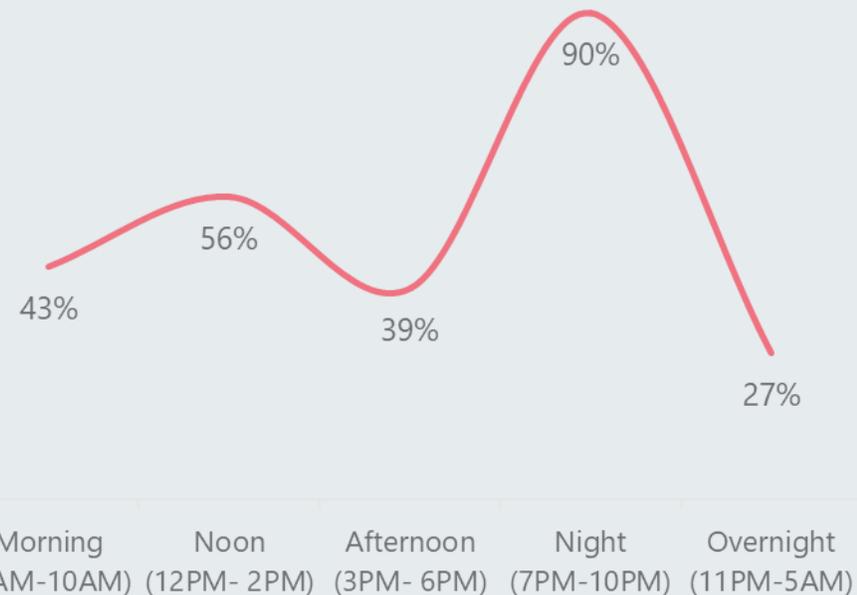
Location to play mobile games



(*) Q: Where are you when you open the game apps and play?

n = 72

Time of playing



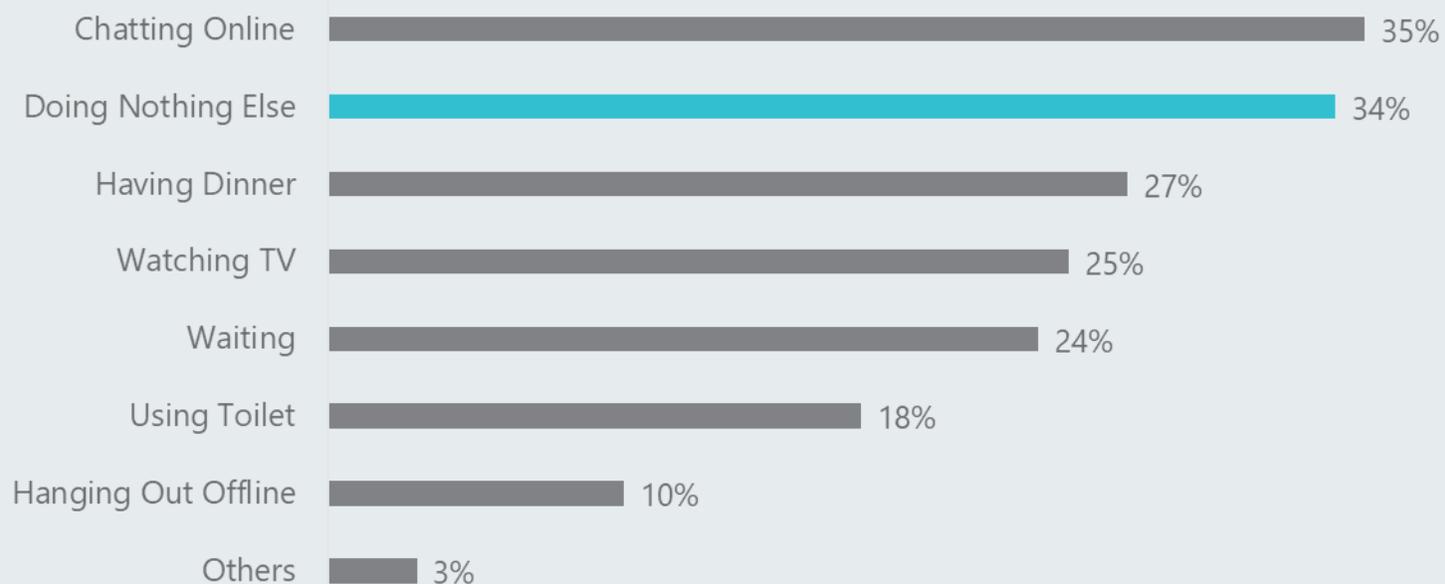
(*) Q: At what time of the day do you play games in-app on mobile?

n = 72



Multi-tasking while playing mobile games at Home

Top 4 activities while playing games at Home



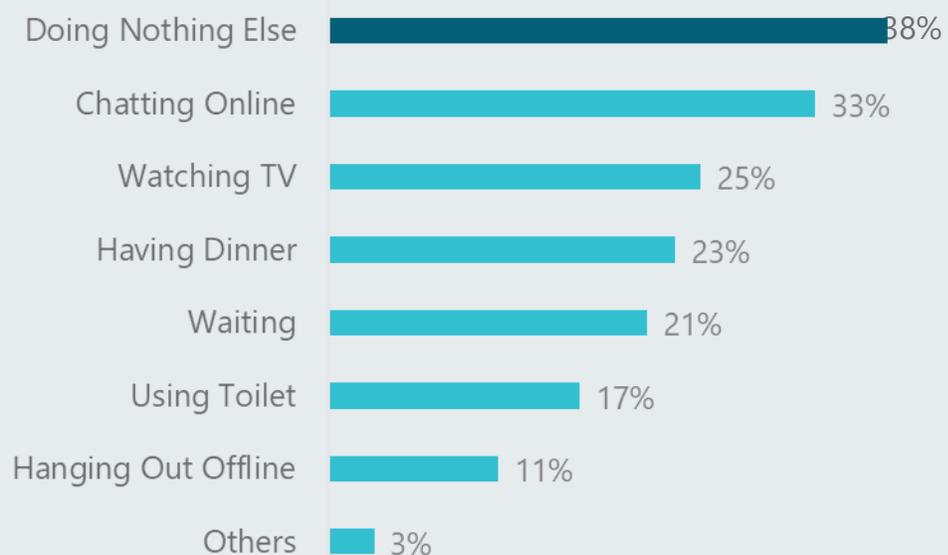
(*) Q: What do you most often do while playing in-app games?

n = 463



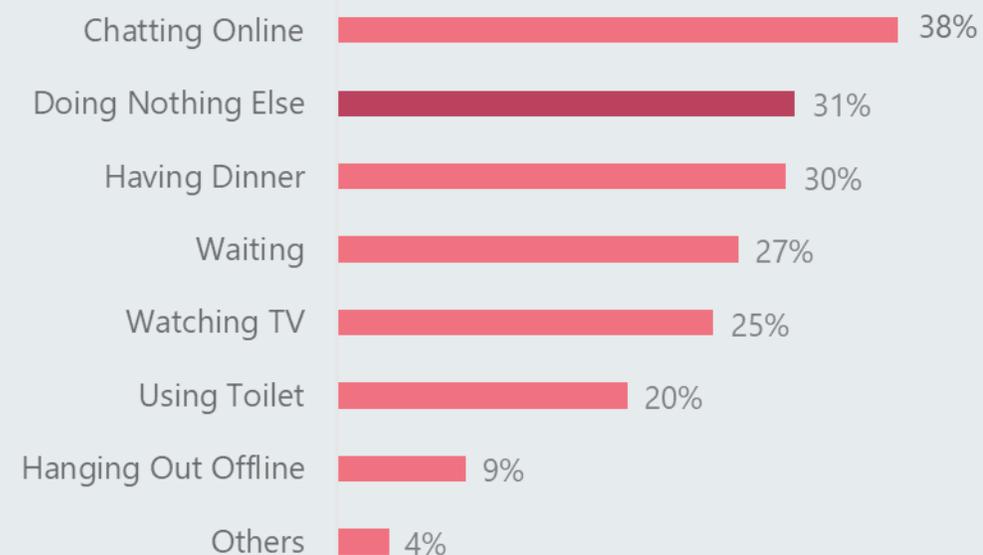
Multi-tasking while playing mobile games at Home by gender

Top 4 activities while playing games at Home for Males



n = 231

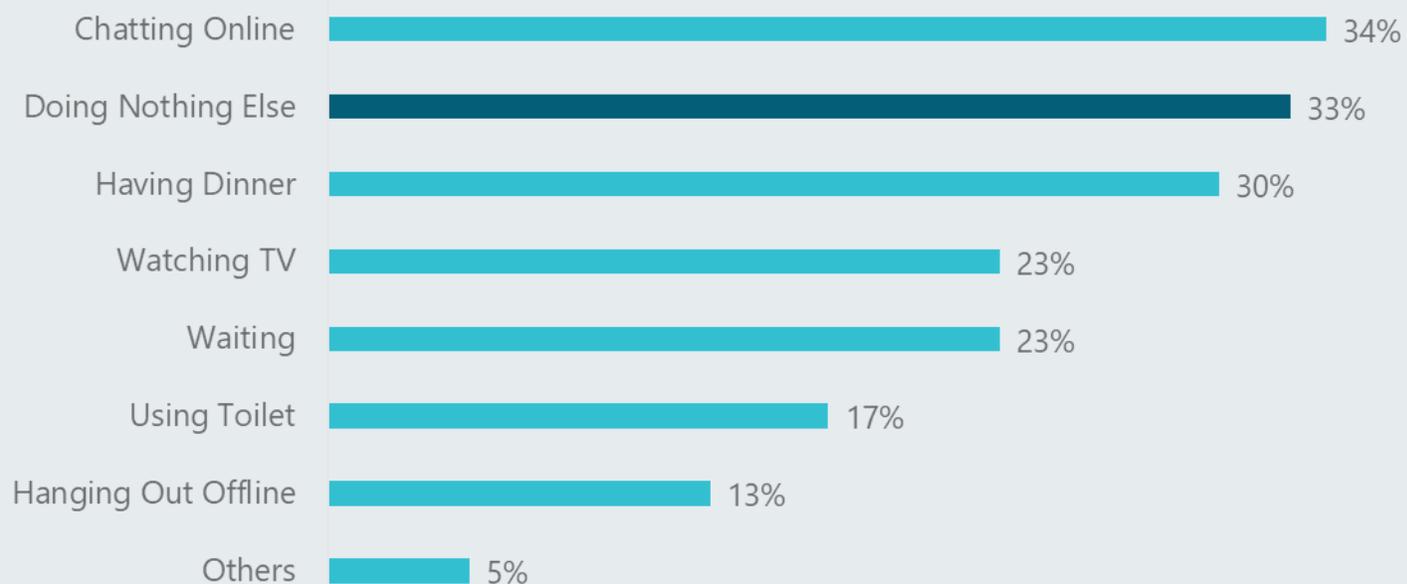
Top 4 activities while playing games at Home for Females



n = 232

Millennials: Multi-tasking while playing mobile games at Home

Top 4 activities while playing games at home for Millennials



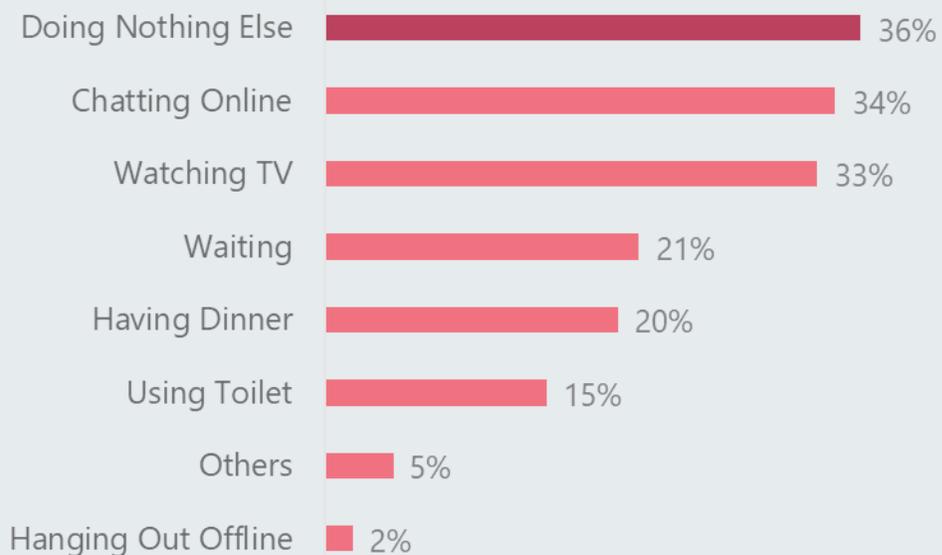
(*) Q: What do you most often do while playing in-app games?

n = 151



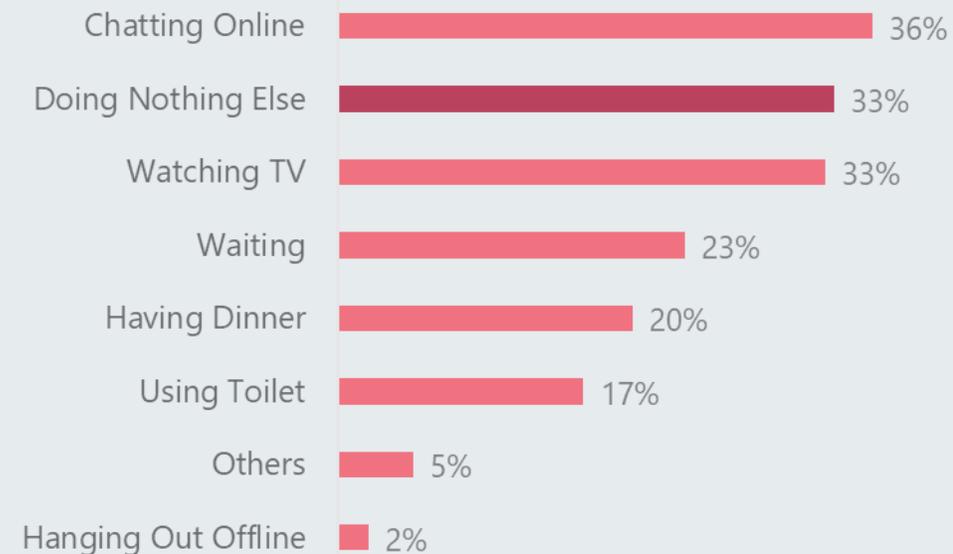
Moms: Multi-tasking while playing mobile games at Home

Top 4 activities while playing games at Home for Moms



n - 80

Top 4 activities while playing games at Home for Moms with Kids younger than 10 years old



n - 72

Device usage



Devices used when playing mobile games



72% Mobile Only



4% Tablet Only



23% Both Devices

Devices used by age groups when playing mobile games



< 35 Years Old



35+ Years Old

Mobile Only

77%

62%

Tablet Only

2%

10%

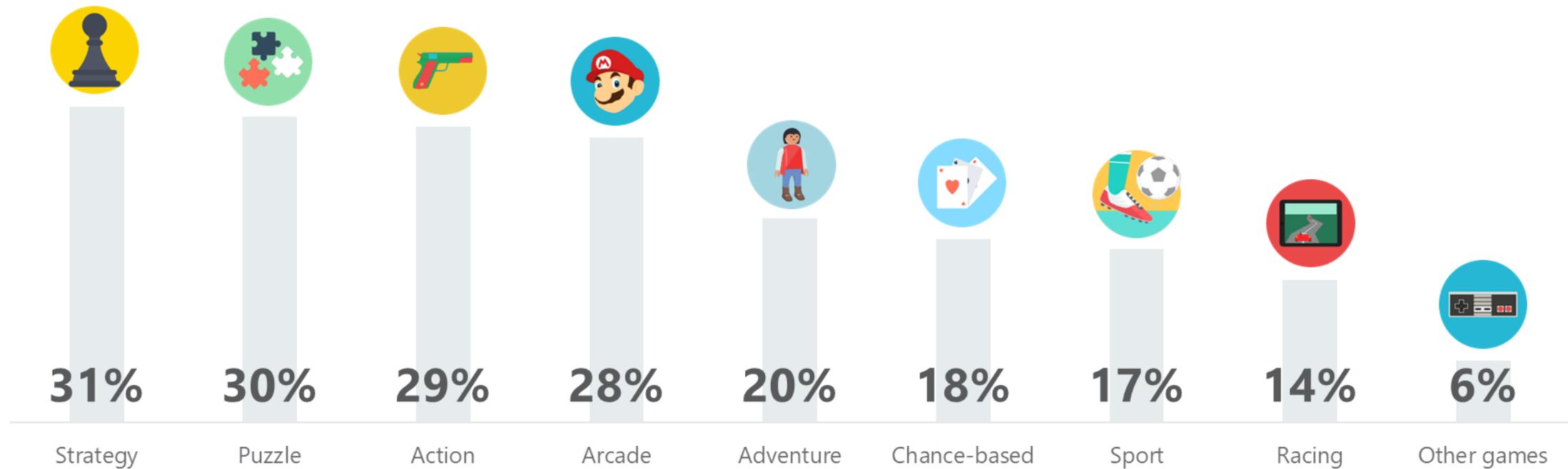
Both Devices

21%

28%

(*) Q: On which devices do you usually use to play mobile games?

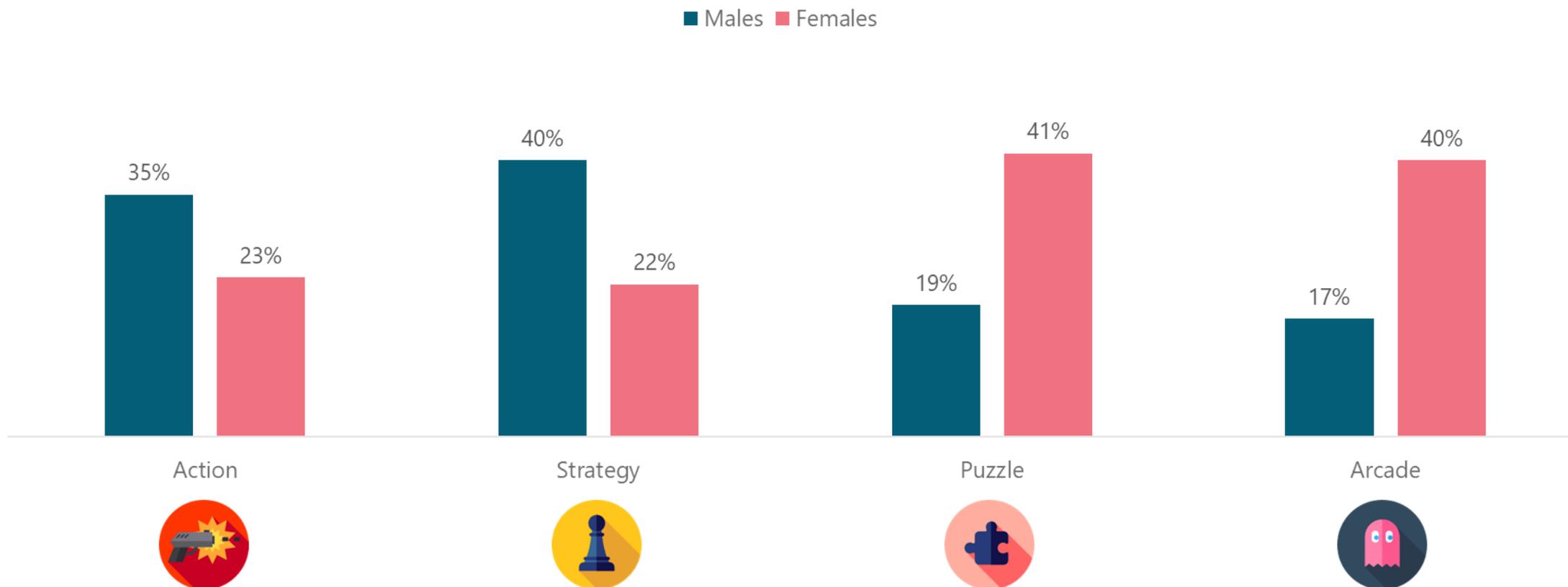
Game types



(*) Q: What genres of online games have you played for the past 4 weeks?

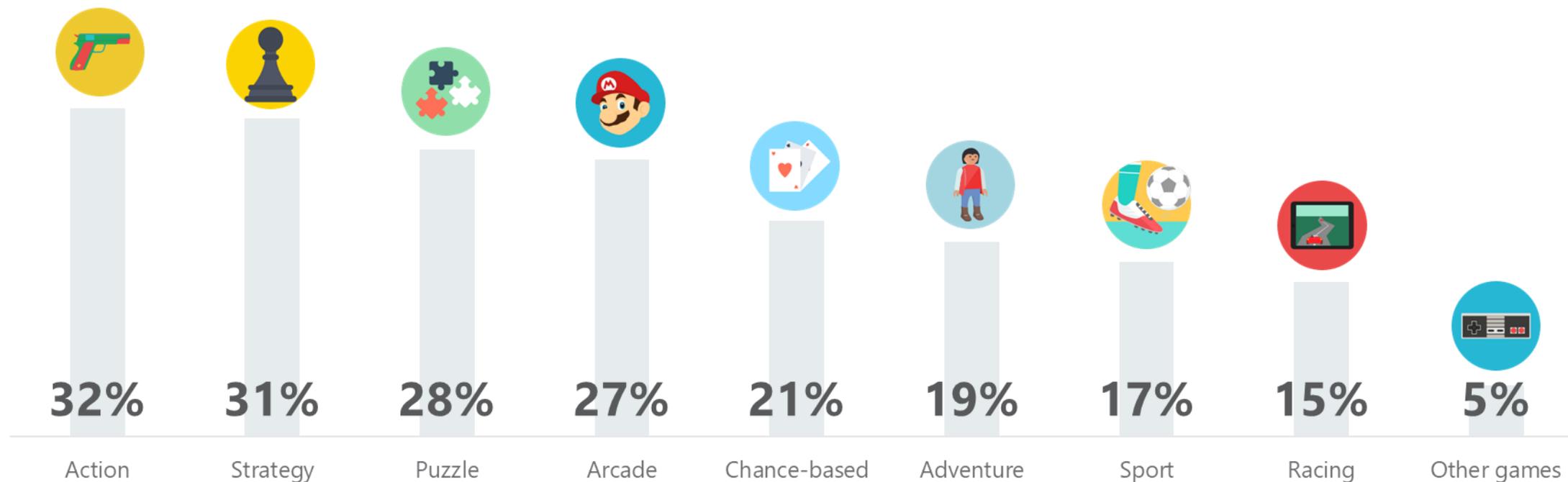


Top game types by gender



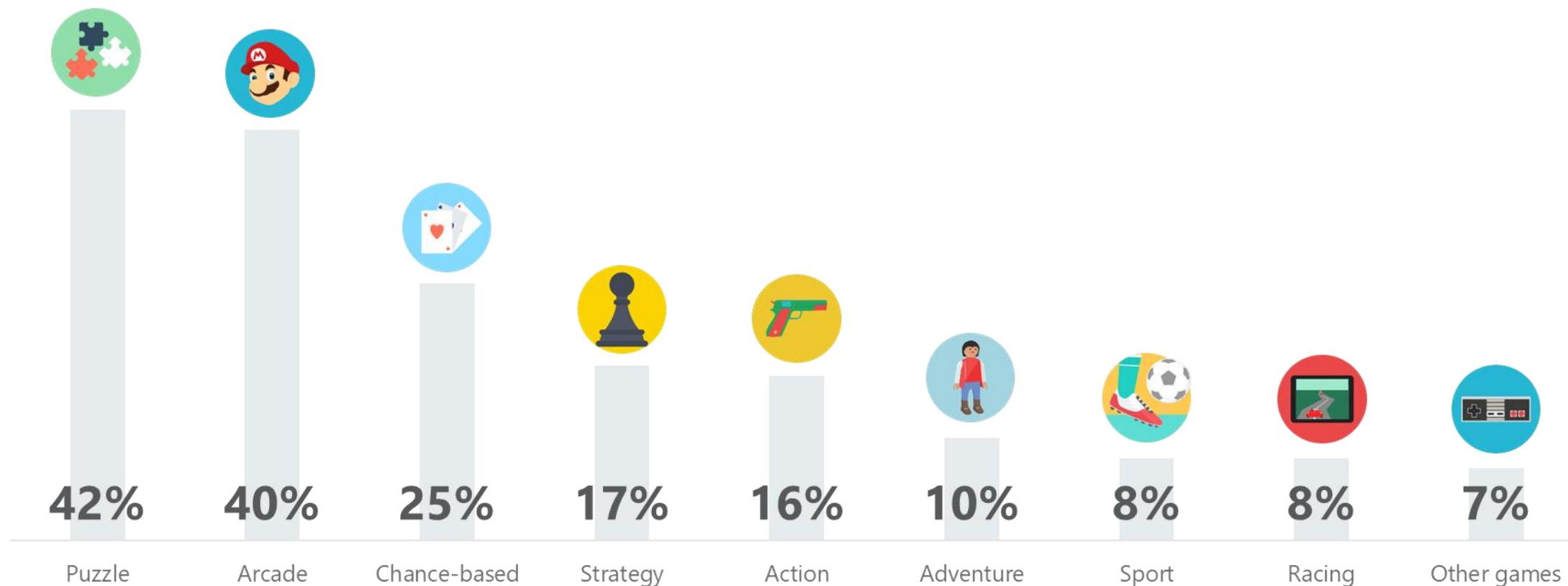
(*) Q: What genres of online games have you played for the past 4 weeks?

Game types played by Millennials



(*) Q: What genres of online games have you played for the past 4 weeks?

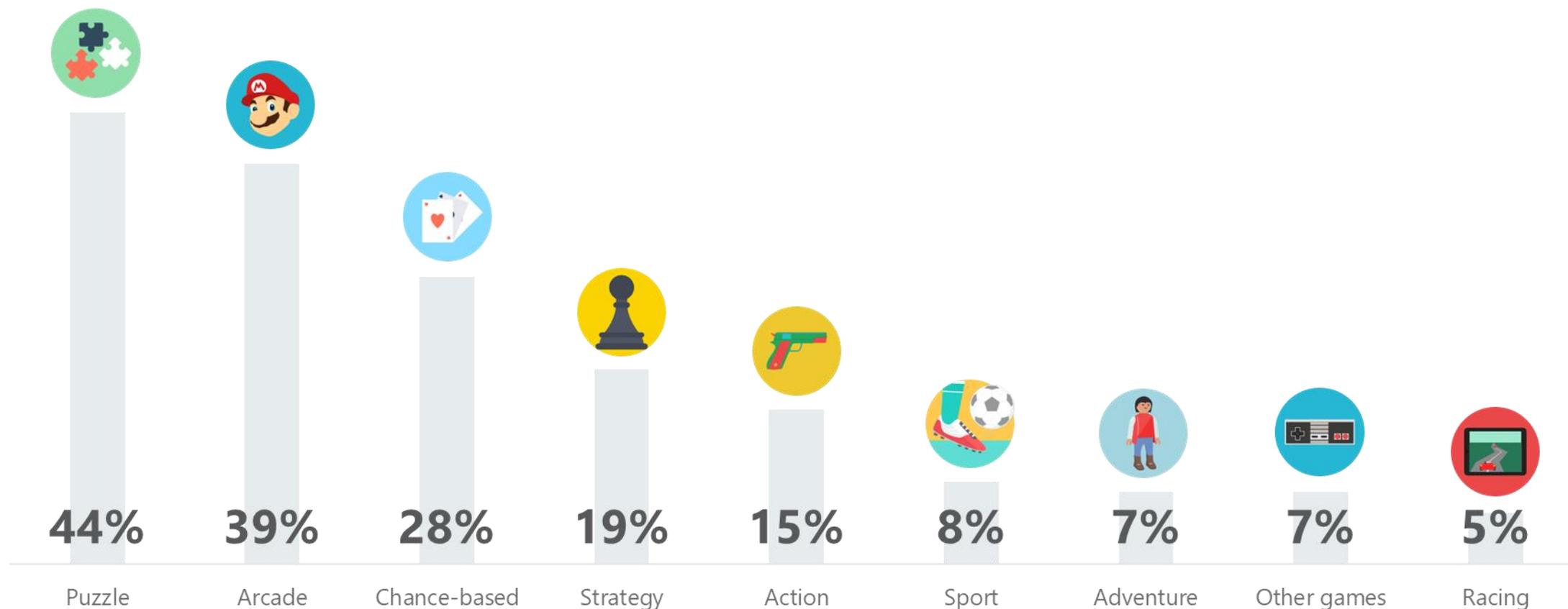
Game types played by Moms



(*) Q: What genres of online games have you played for the past 4 weeks?



Game types played by Moms with Kids under 10 years old



(*) Q: What genres of online games have you played for the past 4 weeks?

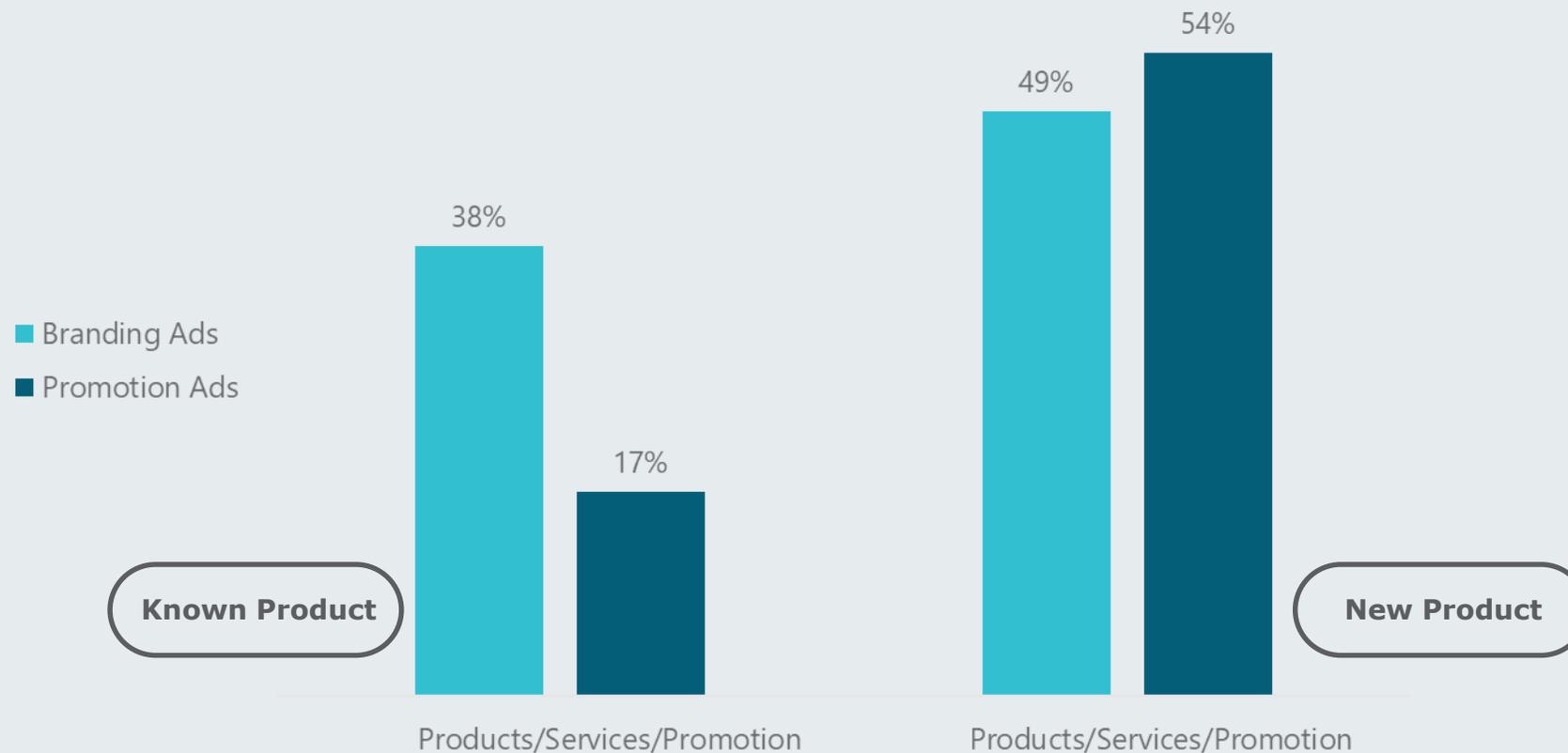
A top-down view of two pairs of hands holding smartphones against a dark, marbled background. The hands are wearing dark suit sleeves. The top pair of hands is holding a smartphone with a thumbs-up icon on the screen. The bottom pair of hands is holding a smartphone with a refresh icon on the screen.

Advertiser question #4

WHAT TYPE OF AD AND AD CONTENT
SHOULD I SERVE TO GAMERS?



Acceptance of ad content



Acceptance of ad content

(*) Q: Which of the following ads information that you are comfortable watching/seeing when you're playing mobile games?

n = 778

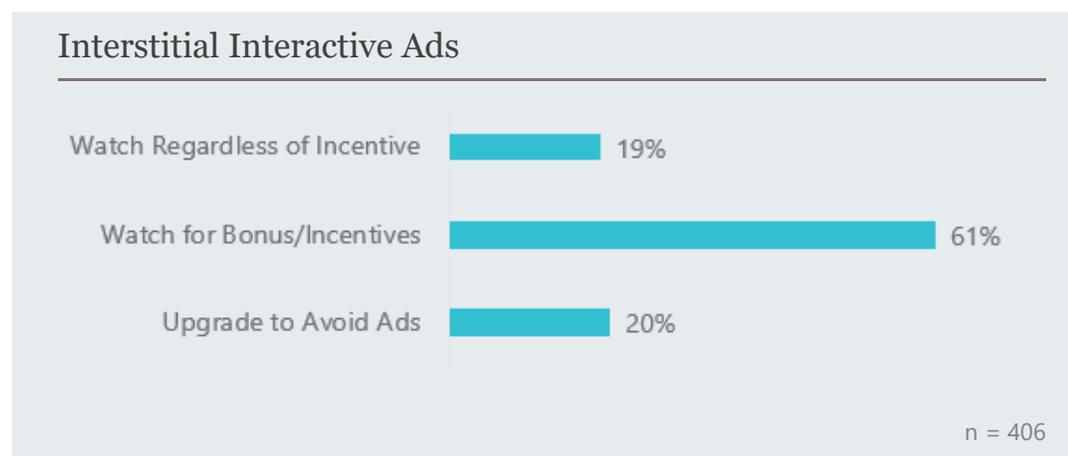
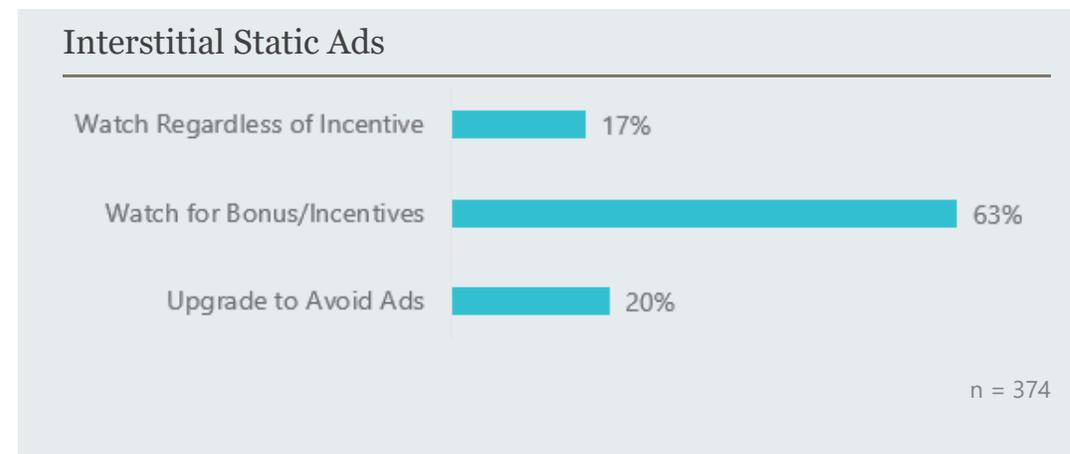
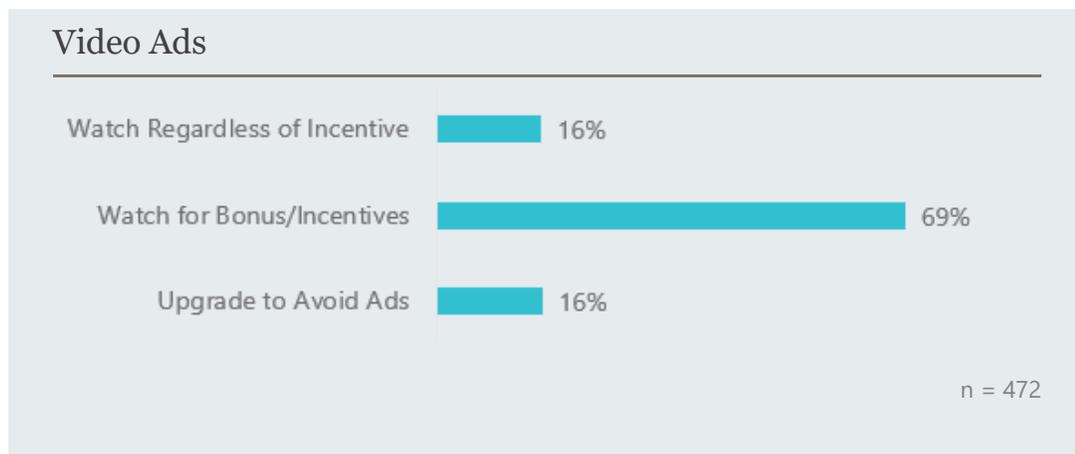
Advertiser question #5

WHAT CAN I DO TO ENGAGE GAMERS
WITH MY ADS?



Gamers reactions to in-game ads

A large proportion of gamers will be willing to see the ads if there are bonus or incentives. (**)

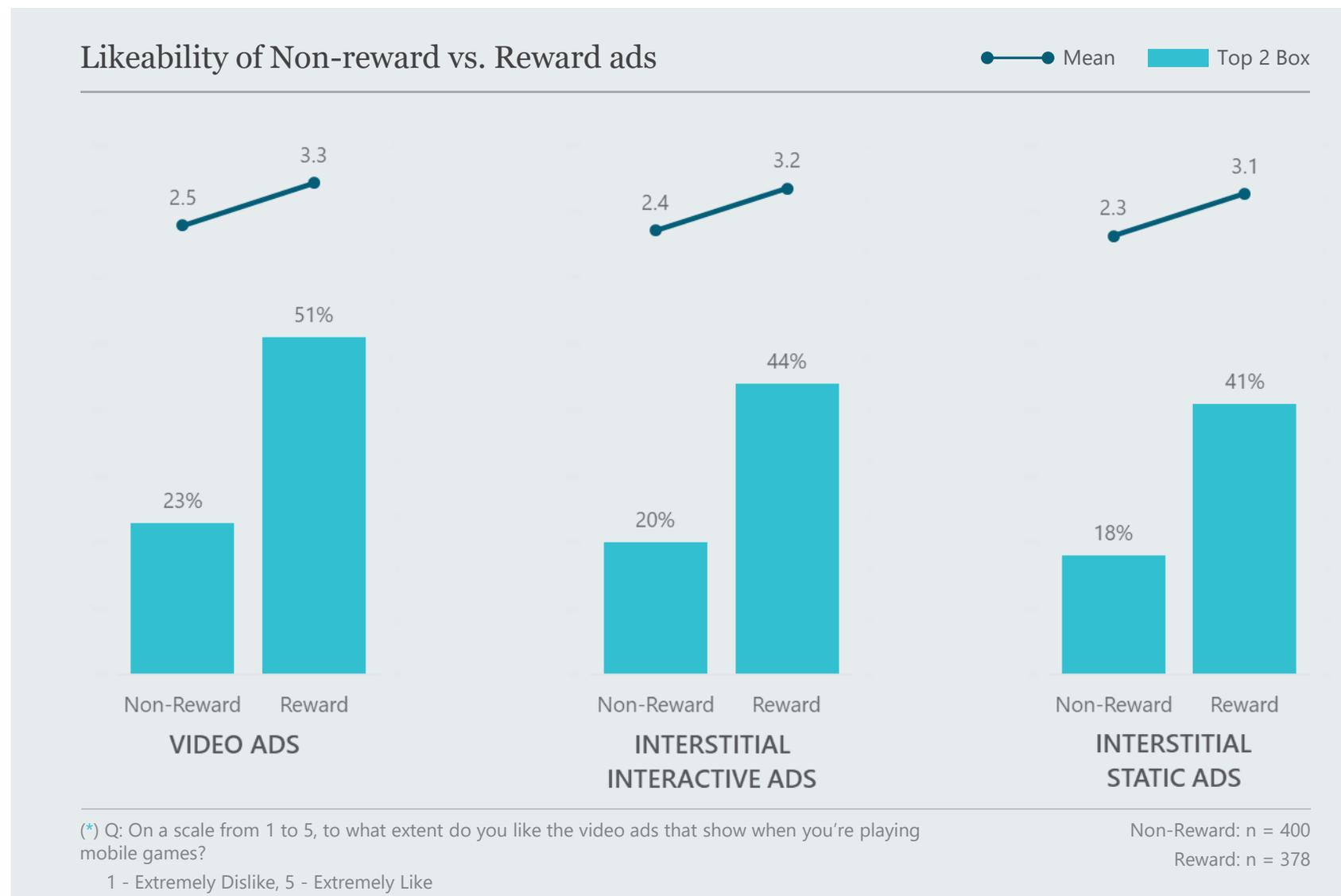


(*) Q: Which of the following action would you most likely to do when you see an ad while playing mobile games?

(**) Exclude people who chose to close/skip ads

The role of reward ads

Rewards can make a difference in how likeable the ads become. On all formats of ads, rewards can shift up the likeability significantly.



The role of reward for video ads

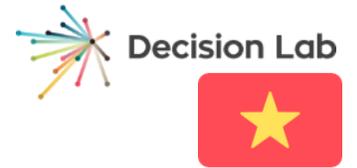
	LIKEABILITY MEAN SCORE	LIKEABILITY TOP 2 BOX	AVERAGE TOLERATED LENGTH (SECONDS)
NON REWARDED VIDEO ADS n = 400	2.5***	23%***	15***
REWARDED VIDEO ADS n = 378	3.3	51%	19

*** Significantly lower than the rewarded video ads at 99% confidence interval

(*) Q: On a scale from 1 to 5, to what extent do you like the video ads that show when you're playing mobile games?

1 - Extremely Dislike, 5 - Extremely Like

Country Summary



WHO CAN I REACH IF I SERVE MY AD INSIDE THE GAME APPS?

- Females and Males up to the age of 34 years old, especially younger generation (both genders)

HOW MUCH FACETIME CAN I HAVE WITH THOSE GAMERS?

- More facetime and more frequently with Males (56 minutes) than Females (45 minutes)

WHERE AND WHEN CAN I CATCH THOSE GAMERS?

- At home and at night, between 7PM-10PM or lunch time between 12PM-2PM
- In Strategy, Puzzle, Action and Arcade games

WHAT TYPE OF AD AND AD CONTENT SHOULD I SERVE TO GAMERS?

- Ads that introduce a new promotion

WHAT CAN I DO TO ENGAGE GAMERS WITH MY ADS?

- Offer rewards for watching ads, especially Video Ads

Fast track to...



Vietnam



Indonesia



Philippines



Thailand

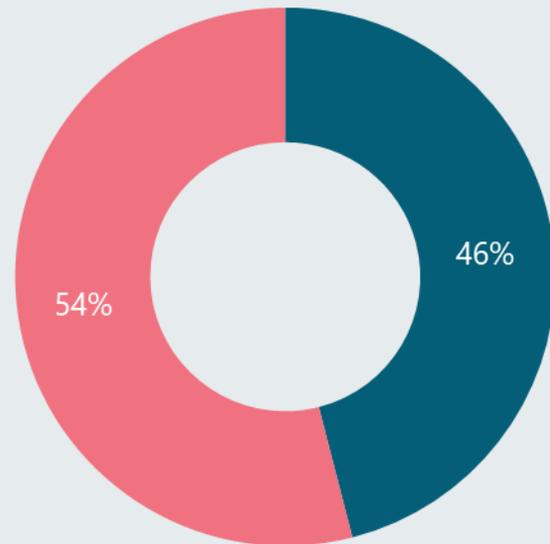
Philippines



Advertiser question #1

WHO CAN I REACH IF I SERVE MY AD
INSIDE THE GAME APPS?

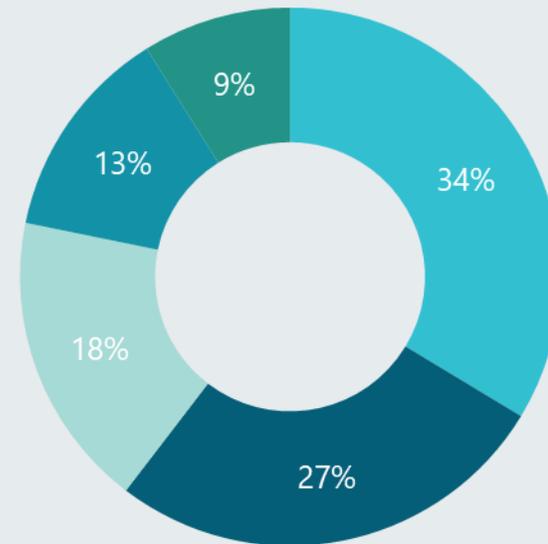
Gamers by gender



■ Males ■ Females

n = 596

Gamers by age groups



■ 16-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55+

n = 596

Gamer demographic

Mobile gamer penetration

Who are they?

GENDER



61 %
Males are Gamers



73 %
Females are Gamers

AGE GROUPS



80%

People 16-24
Y/O are Gamers



74%

People 25-34
Y/O are Gamers



65%

People 35-44
Y/O are Gamers

62%

People 45-54
Y/O are Gamers

39%

People 55+ Y/O
are Gamers

TARGET GROUPS IN HIGH DEMAND FOR ADVERTISERS



74%

Males
18-35 Years Old
are Gamers



83%

Females
18-35 Years Old
are Gamers



69%

Moms are
Gamers

Moms as mobile gamers

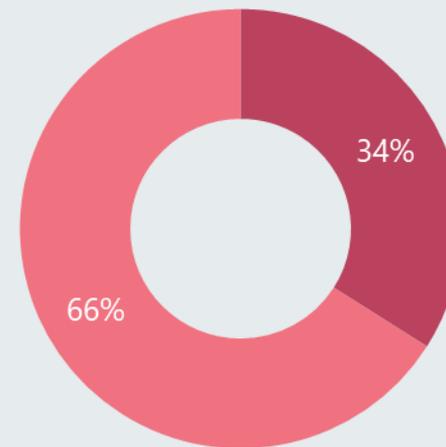
Penetration



69%
of Moms are
gamers

n = 144

Percentage of Moms in Females



■ Moms ■ Females

n = 320

Moms with Kids under 12 years old as mobile gamers

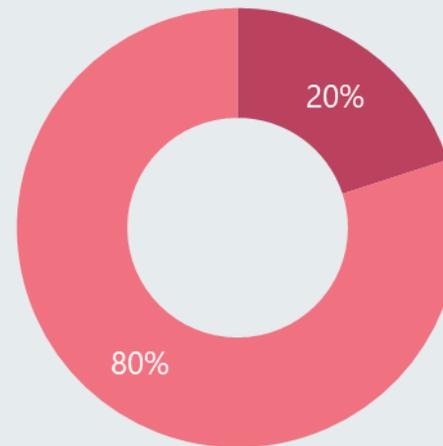
Penetration



71%
of Moms with
Kids under 12
years old are
gamers

n = 88

Percentage of Moms with Kids under 12 years old in Females



■ Moms ■ Females

n = 320

Millennials as mobile gamers

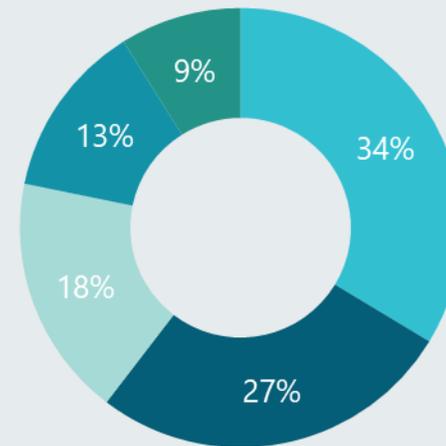
Penetration

74%
of Millennials
are gamers



n = 214

Percentage of Millennials in mobile gamers



■ 16-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55+

n = 596

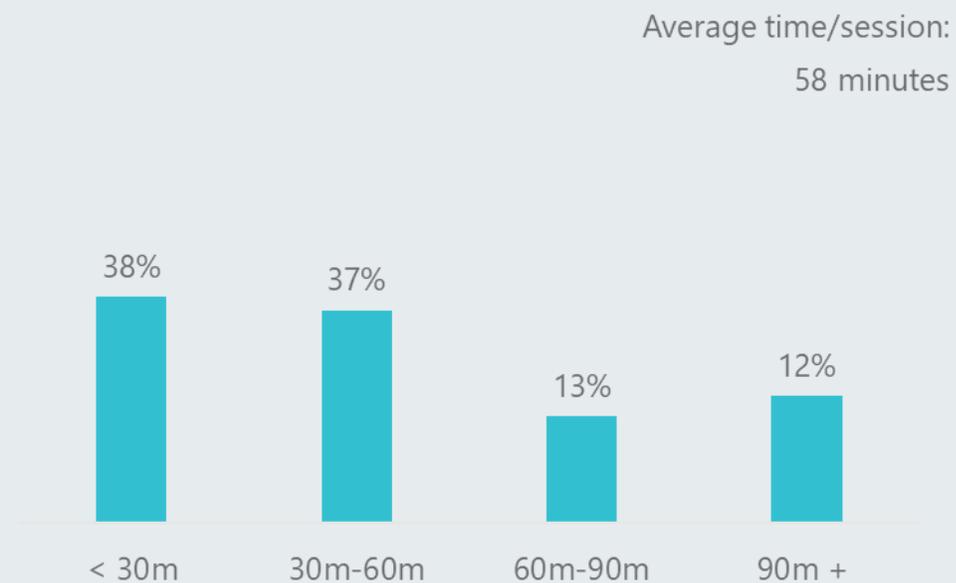
Advertiser question #2

HOW MUCH FACETIME CAN I HAVE WITH
THOSE GAMERS?

Session Time - Overall

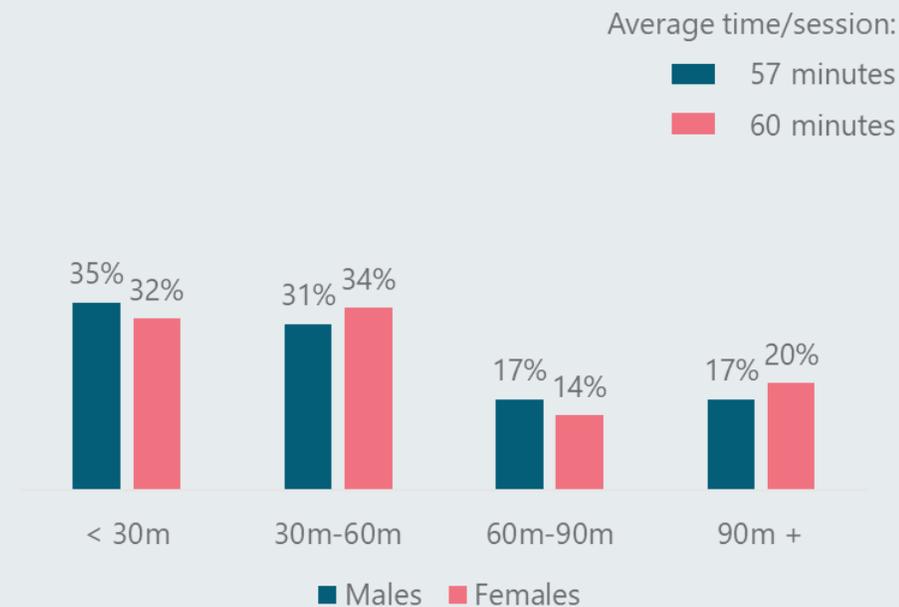
Most gamers spend no more than 60 minutes each time they play mobile games. Both Males and Females spend roughly the same amount of time in game apps.

Time per each session



(*) Q: On average, how much time do you spend playing on each session? n = 596

Time per each session by gender

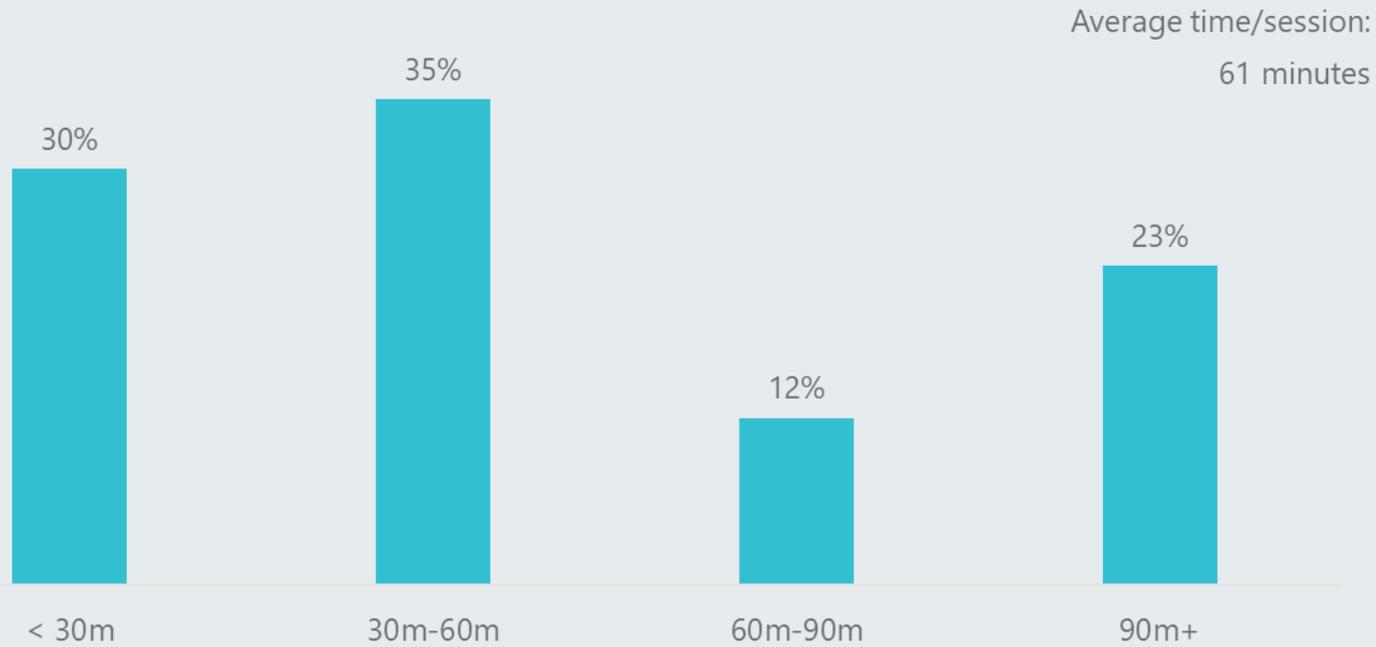


(*) Q: On average, how much time do you spend playing on each session? n = 596

Millennials – Session Time



Time spent each session of Millennials



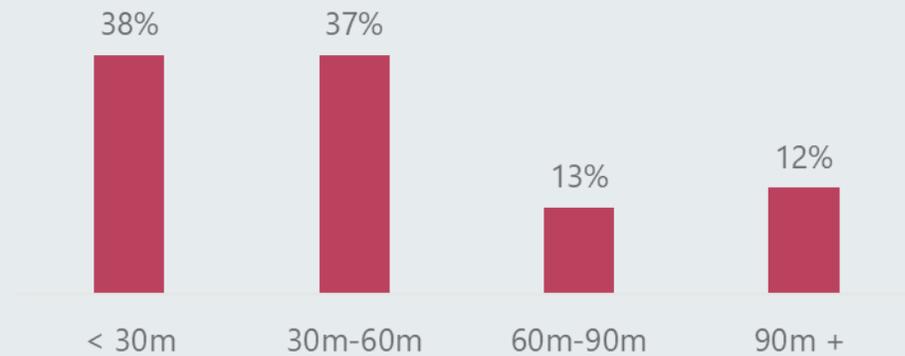
n = 159

Moms – Session Time



Time per each session of Moms

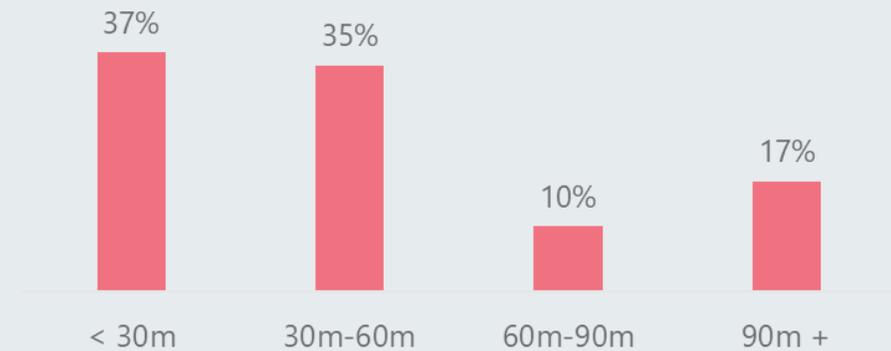
Average time/session:
56 minutes



(*) Q: On average, how much time do you spend playing on each session? n = 99

Time per each session of Moms with Kids under 12 years old

Average time/session:
55 minutes

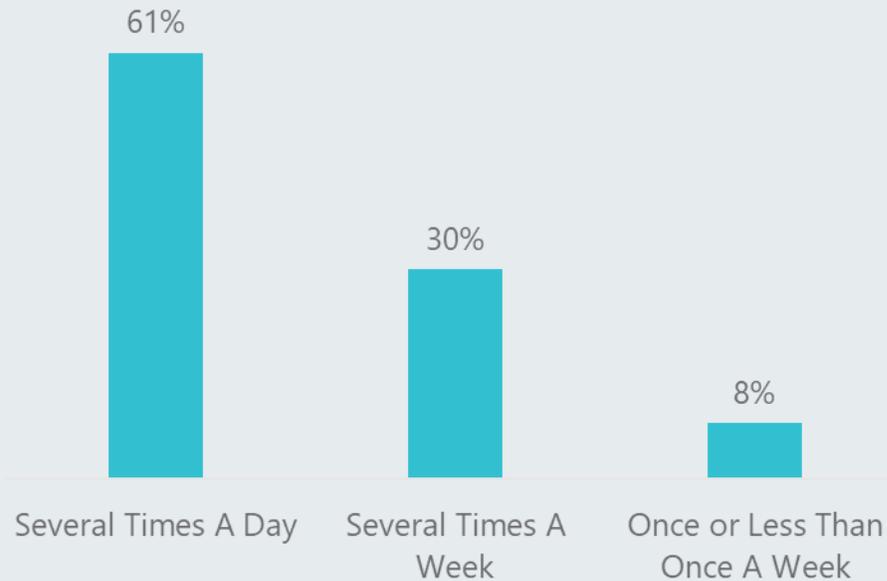


(*) Q: On average, how much time do you spend playing on each session? n = 63

Frequency of playing

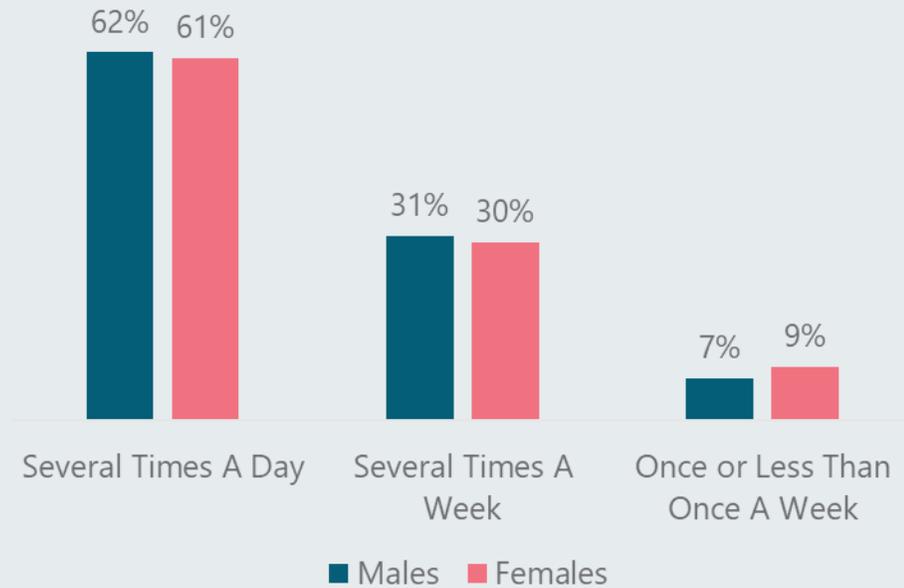
There isn't much difference in the frequency of playing between Males and Females. Advertisers can reach both of them multiple times of the week.

Play frequency



(*) Q: How frequently do you play games using apps on your mobile/tablets? n = 596

Play frequency by gender

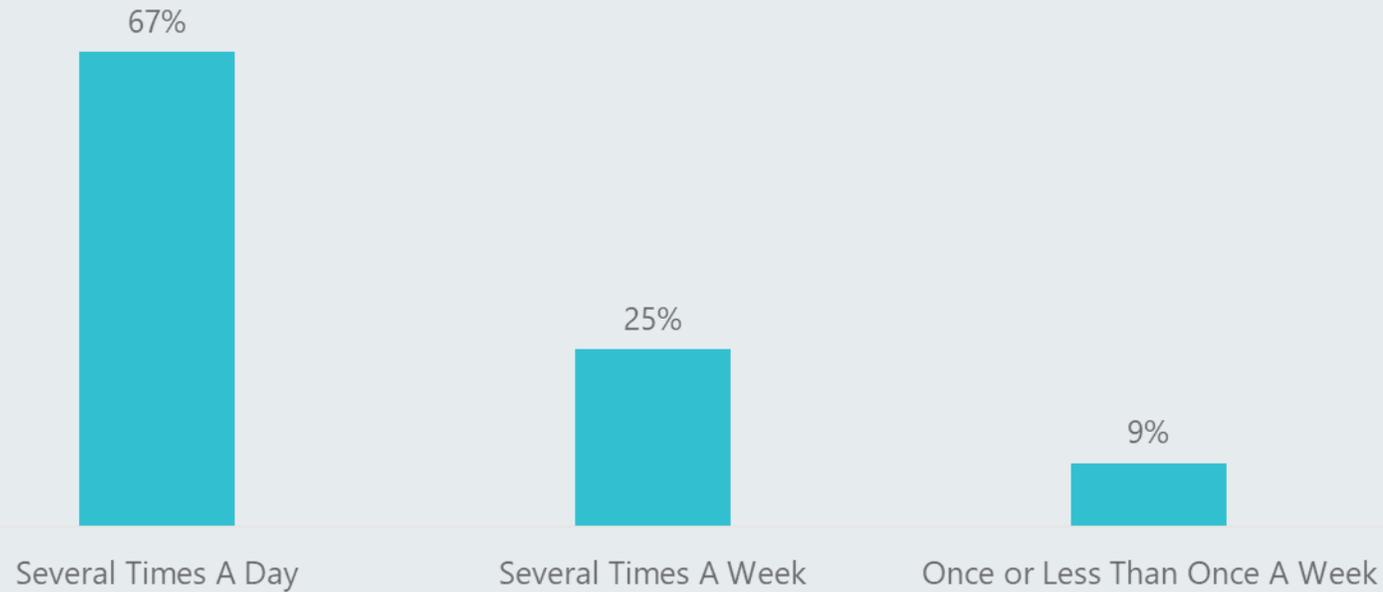


(*) Q: How frequently do you play games using apps on your mobile/tablets? n = 596

Frequency of playing of Millennials



Play frequency of Millennials

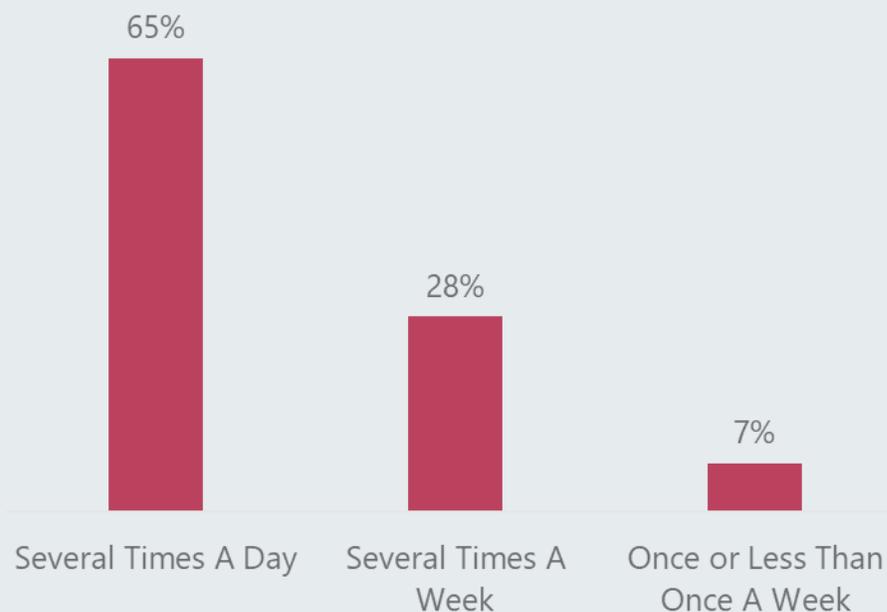


n = 159

Frequency of playing of Moms

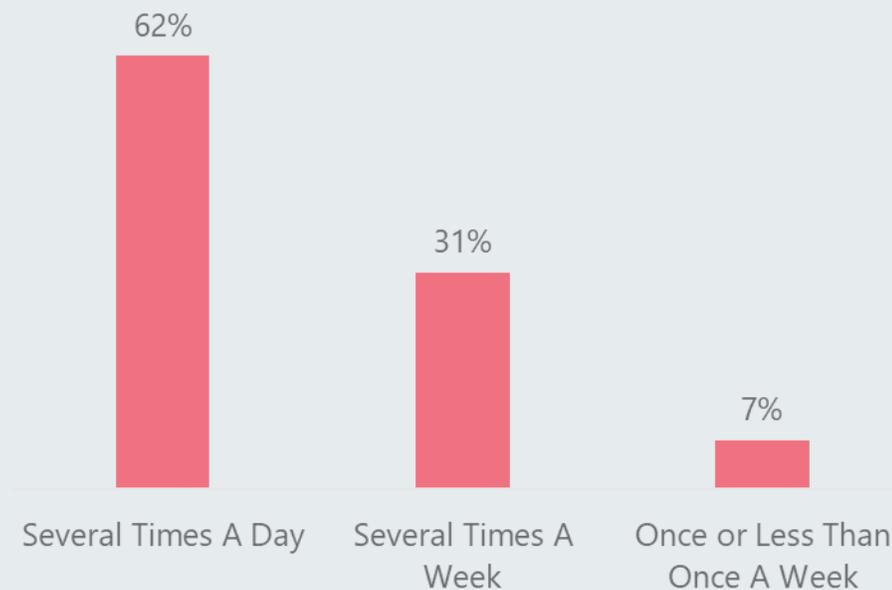
Gamers open the app quite often, at least several times a week. There is not much difference in the frequency of playing between Males and Females. Advertisers can reach both of them multiple times of the week.

Play frequency of Moms



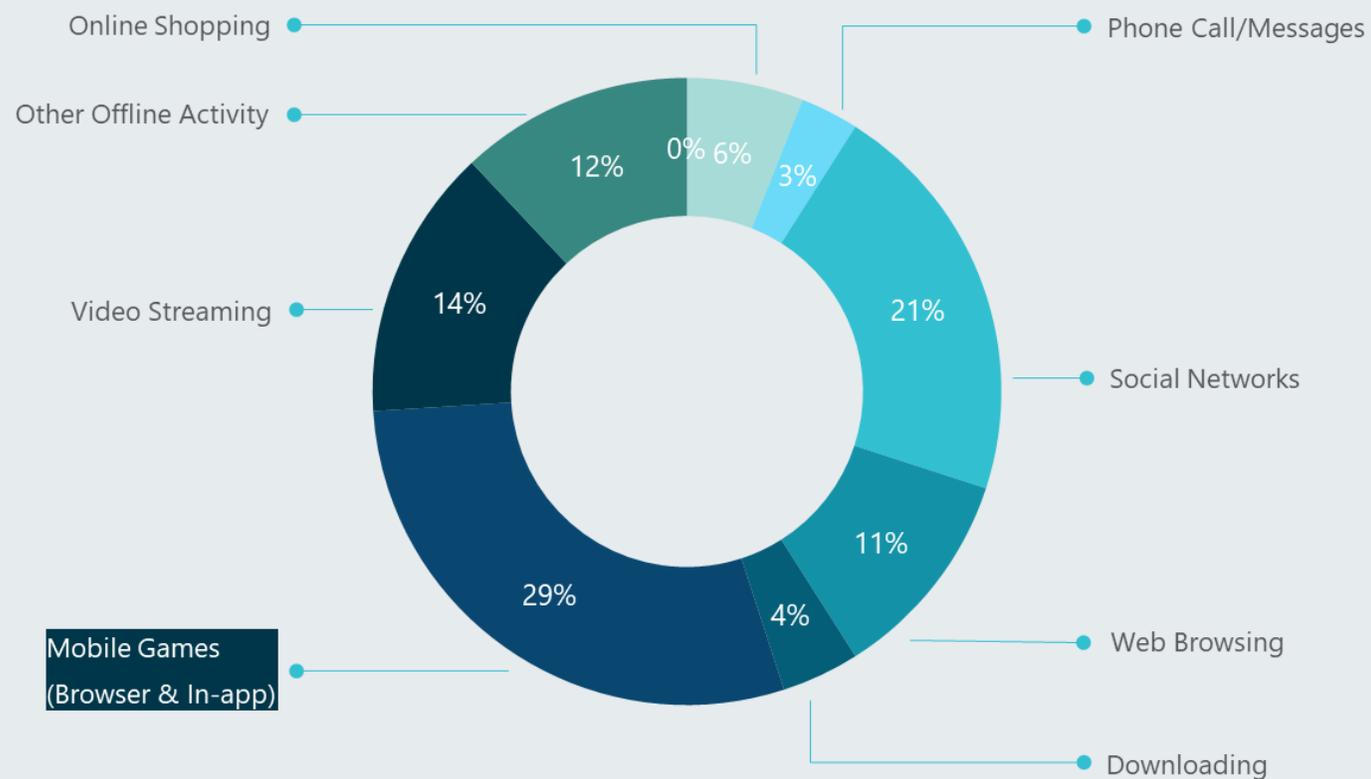
(*) Q: How frequently do you play games using apps on your mobile/tablets? n = 99

Play frequency of Moms with Kids under 12 years old



(*) Q: How frequently do you play games using apps on your mobile/tablets? n = 63

Share of time on mobile



Share of time on mobile

At 29%, playing mobile games takes up the biggest portion of time spent on mobile phones.

(*) Q: Thinking about the last 24 hours, how much time do you spend on your mobile for the following activities?

Advertiser question #3

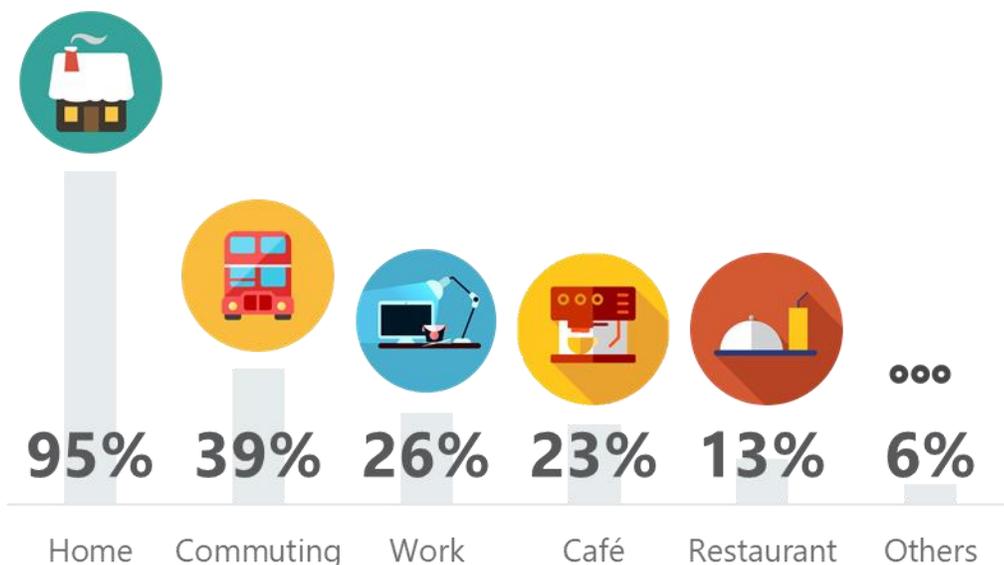
WHERE AND WHEN CAN I CATCH THOSE GAMERS?



Location and time of playing

Gamers mostly play games at home and in the evening. Afternoon from 3PM to 6PM is also a good time to catch them.

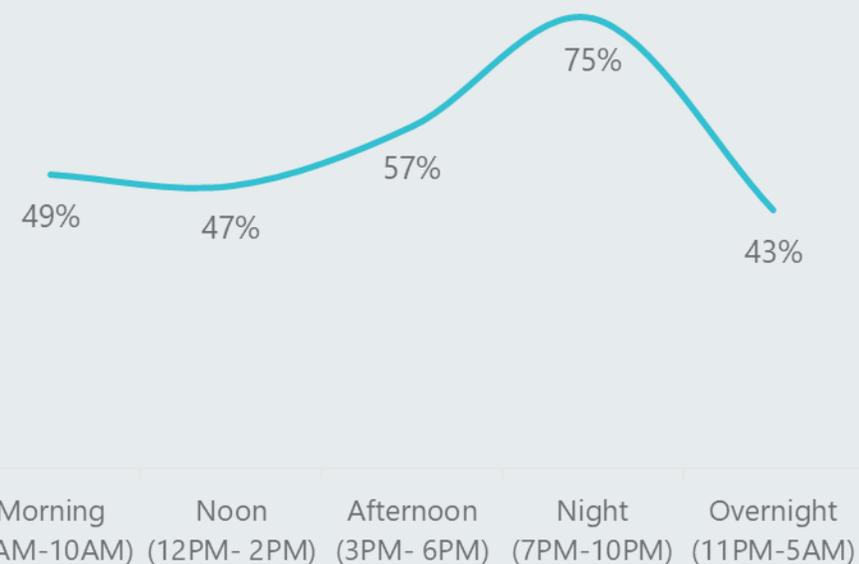
Location to play mobile games



(*) Q: Where are you when you open the game apps and play?

n = 596

Time of playing



(*) Q: At what time of the day do you play games in-app on mobile?

n = 596

Location and time of playing of Males

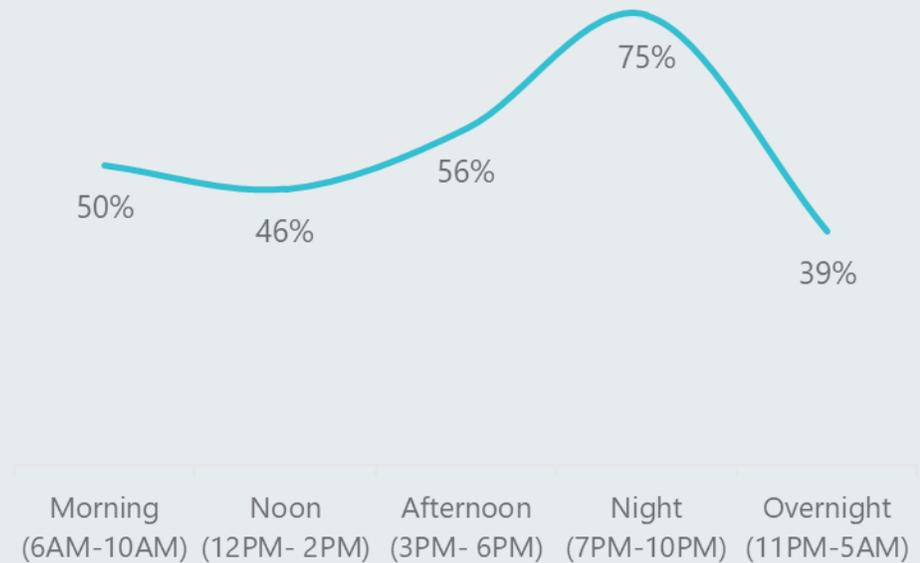
Location to play mobile games



(* Q: Where are you when you open the game apps and play?

n = 276

Time of playing

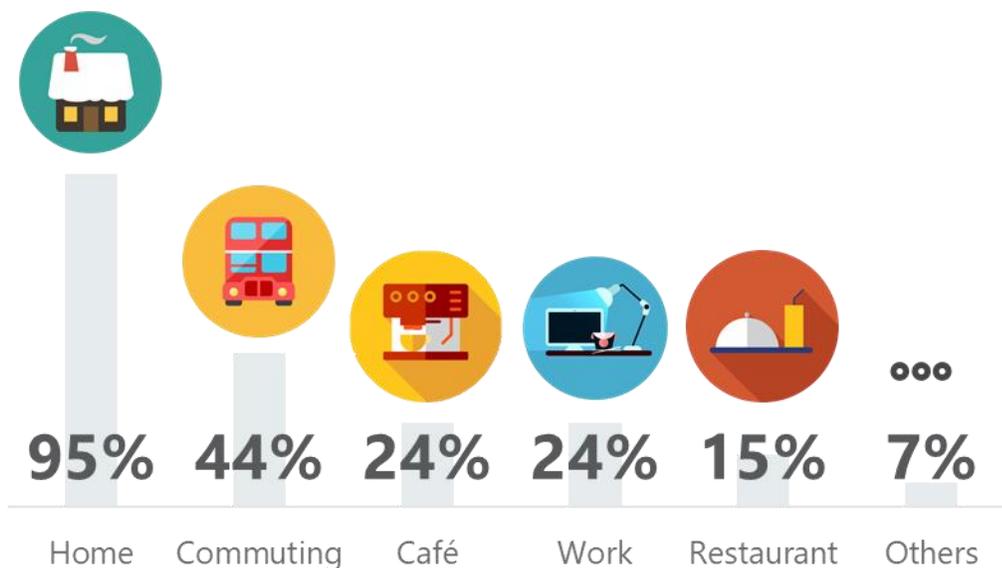


(* Q: At what time of the day do you play games in-app on mobile?

n = 276

Location and time of playing of Females

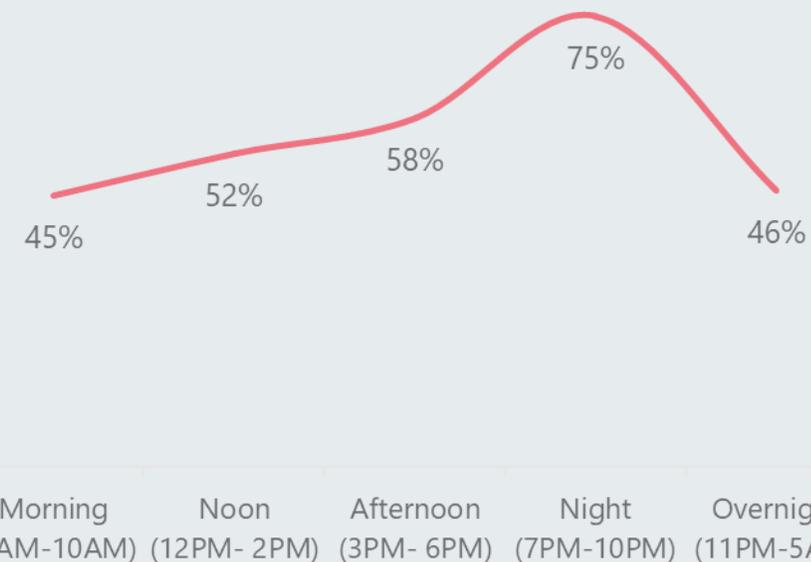
Location to play mobile games



(*) Q: Where are you when you open the game apps and play?

n = 320

Time of playing

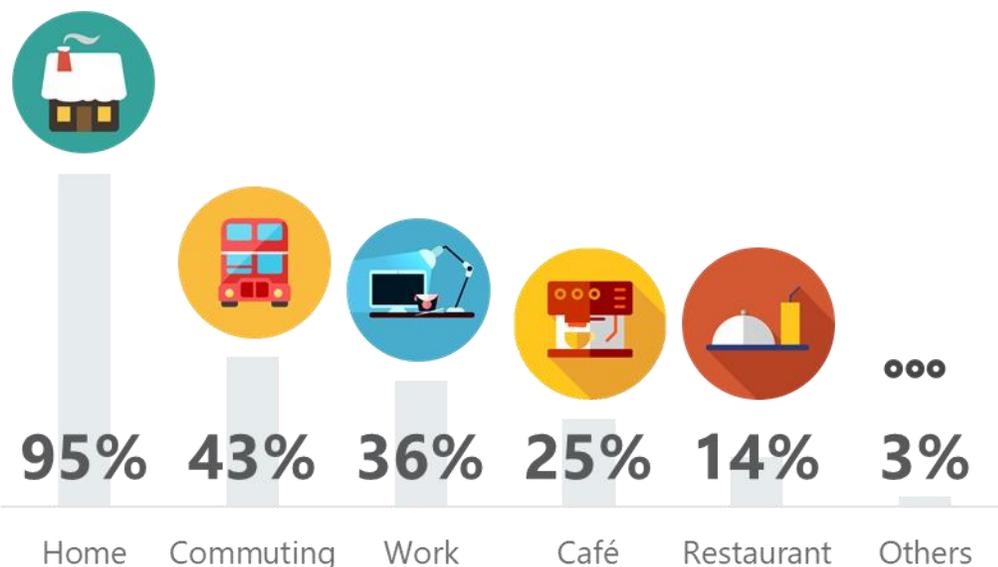


(*) Q: At what time of the day do you play games in-app on mobile?

n = 320

Location and time of playing of Millennials

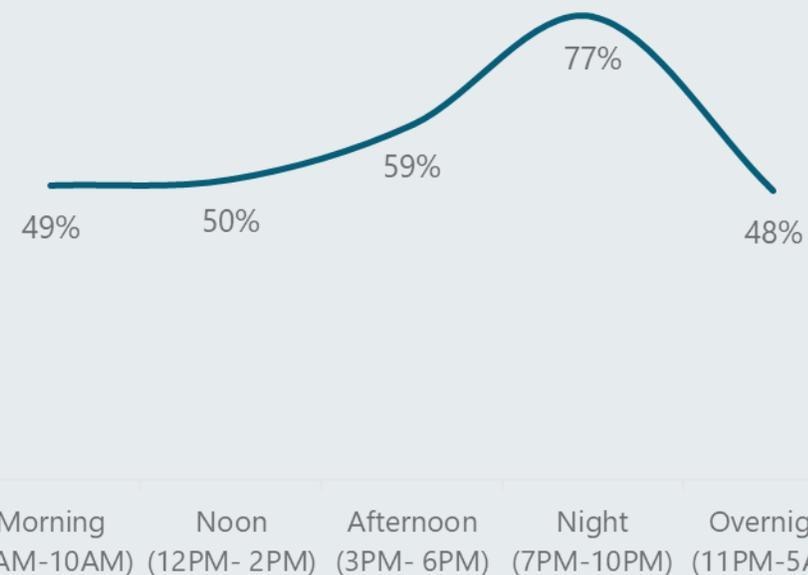
Location to play mobile games



(*) Q: Where are you when you open the game apps and play?

n = 159

Time of playing

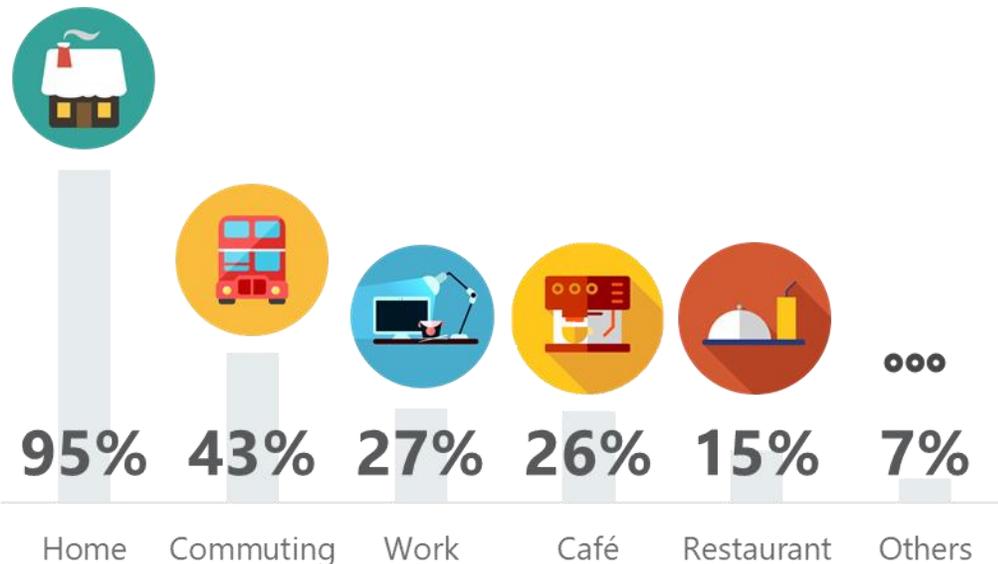


(*) Q: At what time of the day do you play games in-app on mobile?

n = 159

Location and time of playing of Moms

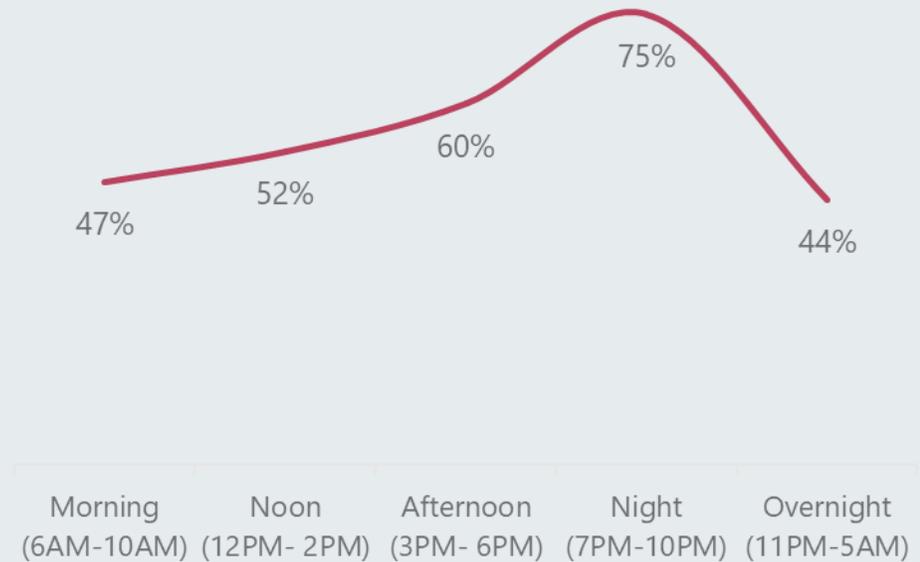
Location to play mobile games



(*) Q: Where are you when you open the game apps and play?

n = 99

Time of playing

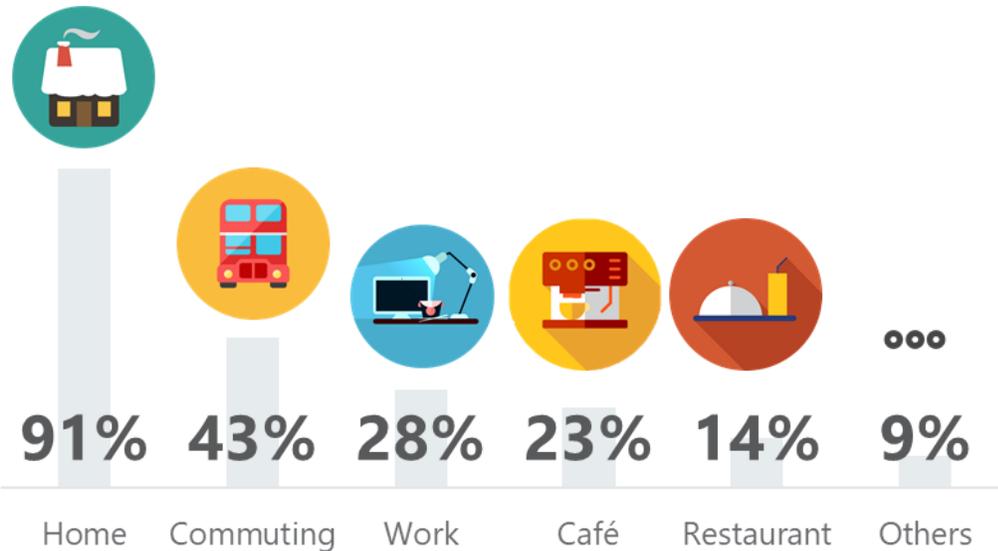


(*) Q: At what time of the day do you play games in-app on mobile?

n = 99

Location and time of playing of Moms with Kids age under 12 years old

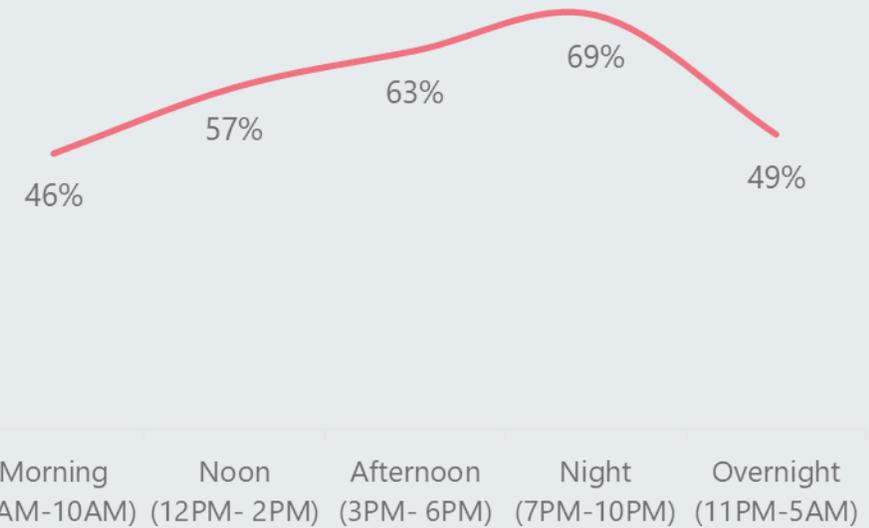
Location to play mobile games



(*) Q: Where are you when you open the game apps and play?

n = 63

Time of playing

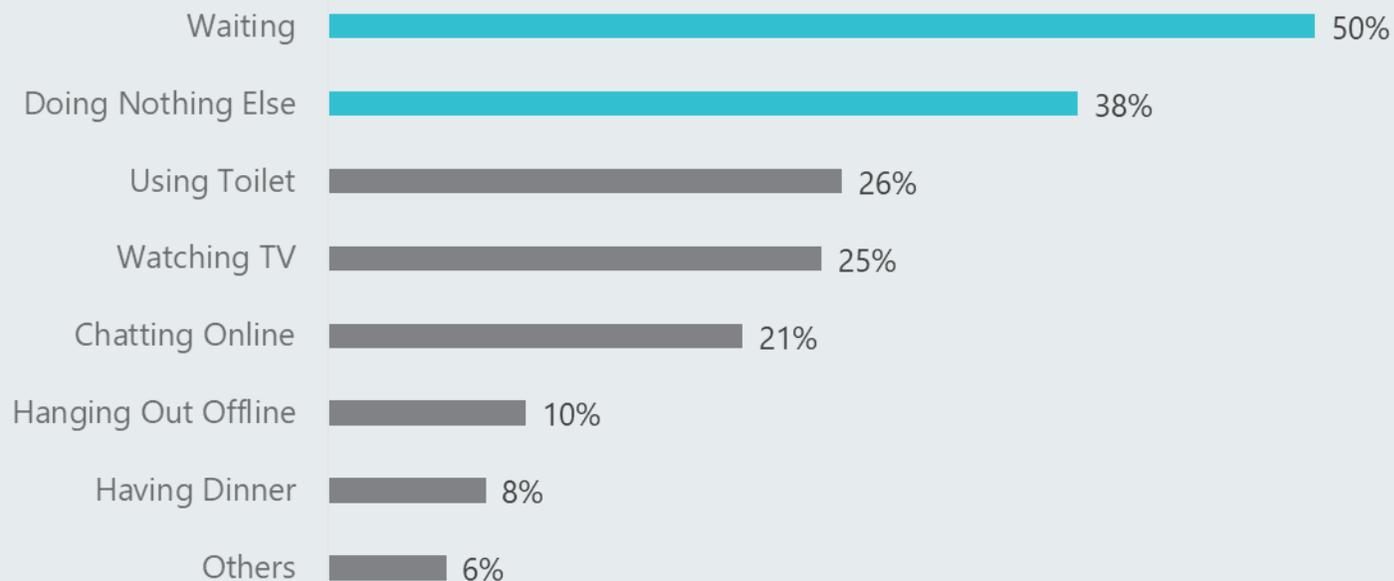


(*) Q: At what time of the day do you play games in-app on mobile?

n = 63

Multi-tasking while playing mobile games at Home

Top 4 activities while playing games at Home



Many people only focus on playing games, but another significant part of them is multi-tasking.

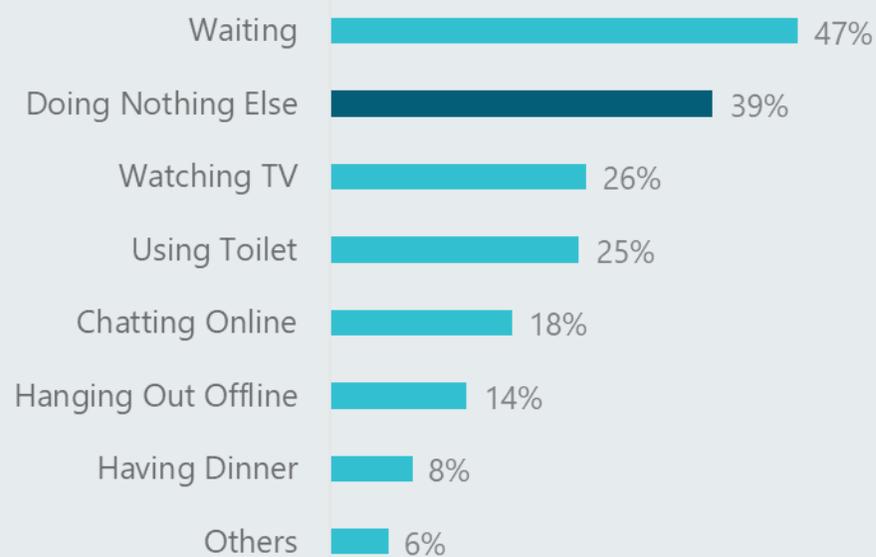
As gamers switch among different activities, it could be difficult to get them exposed to the ads if those ads are placed during games/level break.

(*) Q: What do you most often do while playing in-app games?

n = 568

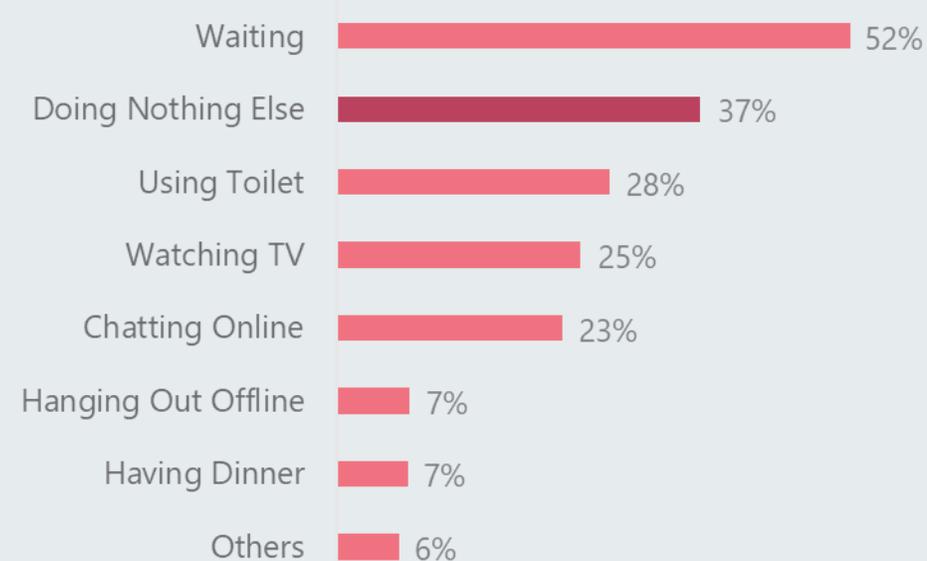
Multi-tasking while playing mobile games at Home by gender

Top 4 activities while playing games at Home for Males



n - 263

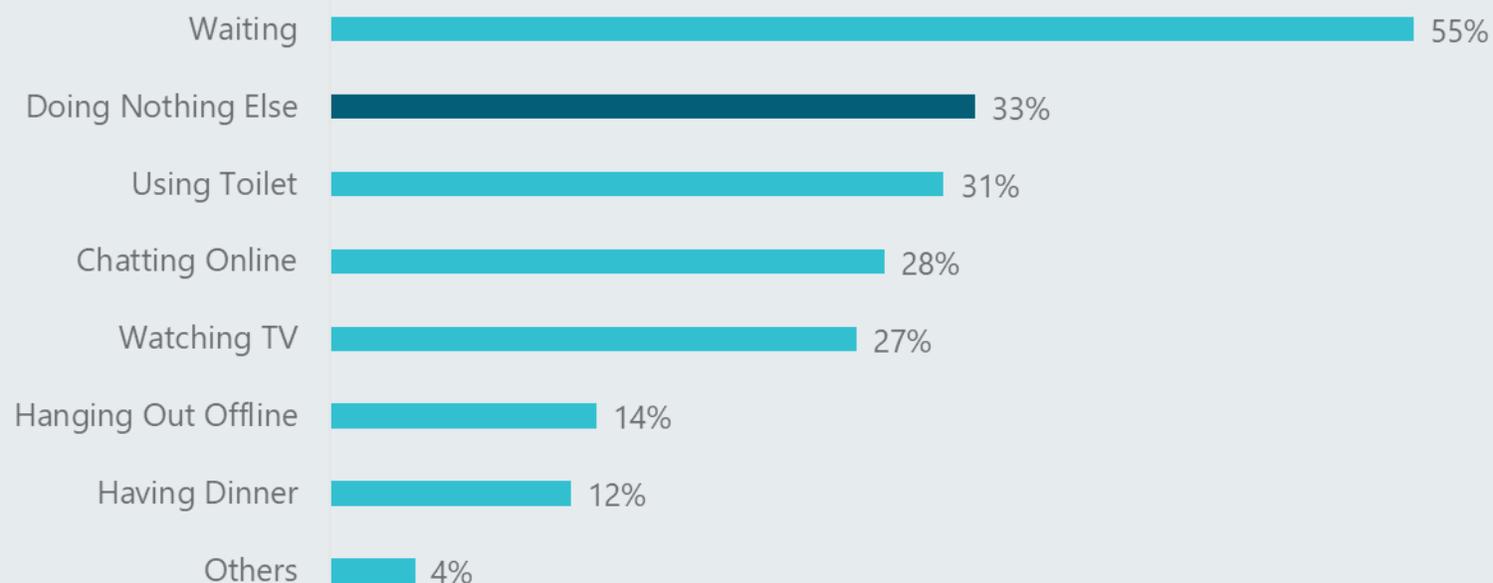
Top 4 activities while playing games at Home for Females



n - 305

Millennials: Multi-tasking while playing mobile games at Home

Top 4 activities while playing games at Home for Millennials

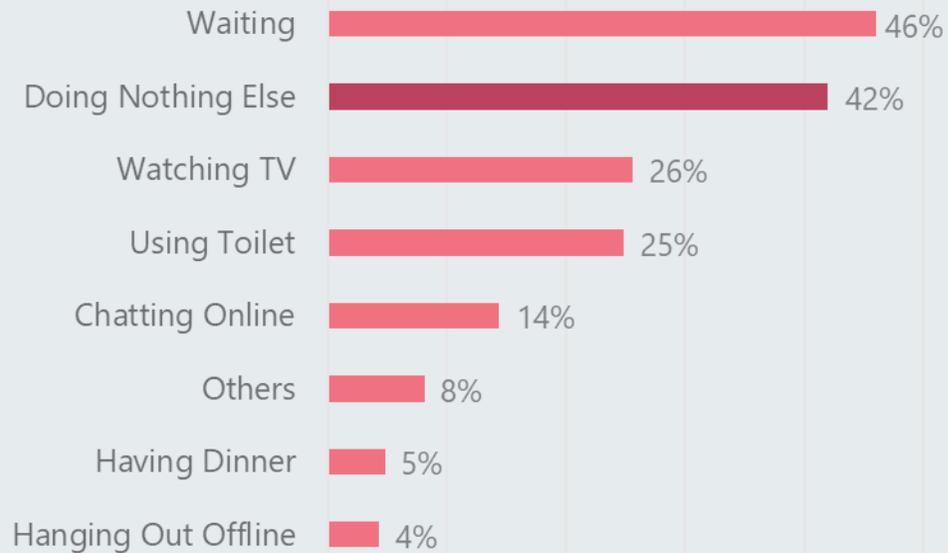


(*) Q: What do you most often do while playing in-app games?

n = 151

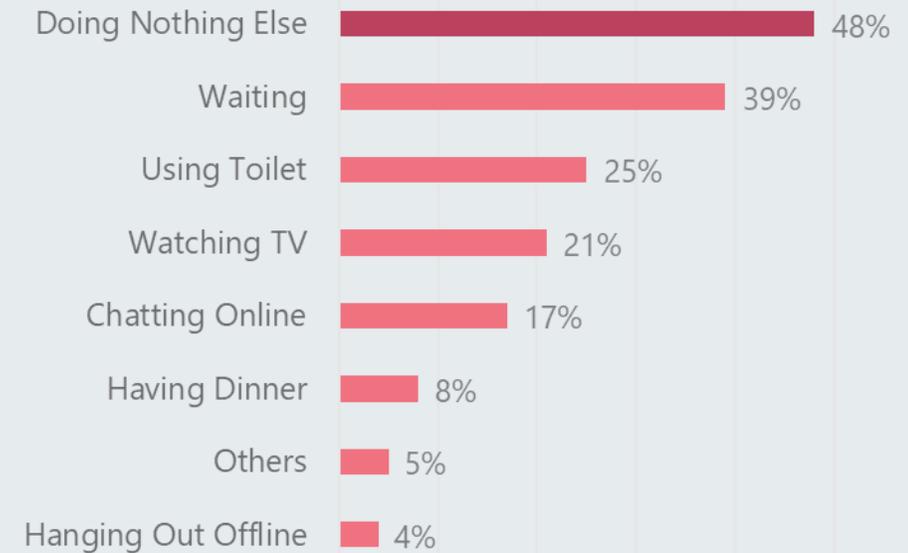
Moms: Multi-tasking while playing mobile games at home

Top 4 activities while playing games at home for Moms



n - 94

Top 4 activities while playing games at home for Moms with kids younger than 12 years old



n - 57

Device usage

Mobiles are considered the most popular devices for gamers to play on. Therefore, it should be the device for the majority of the ad serving. Interestingly, tablets are also quite common for people who are older than 35 years old so that advertisers can also catch them there.

Devices used when playing mobile games



64% Mobile Only



5% Tablet Only



31% Both Devices

Devices used by age groups when playing mobile games



< 35 Years Old



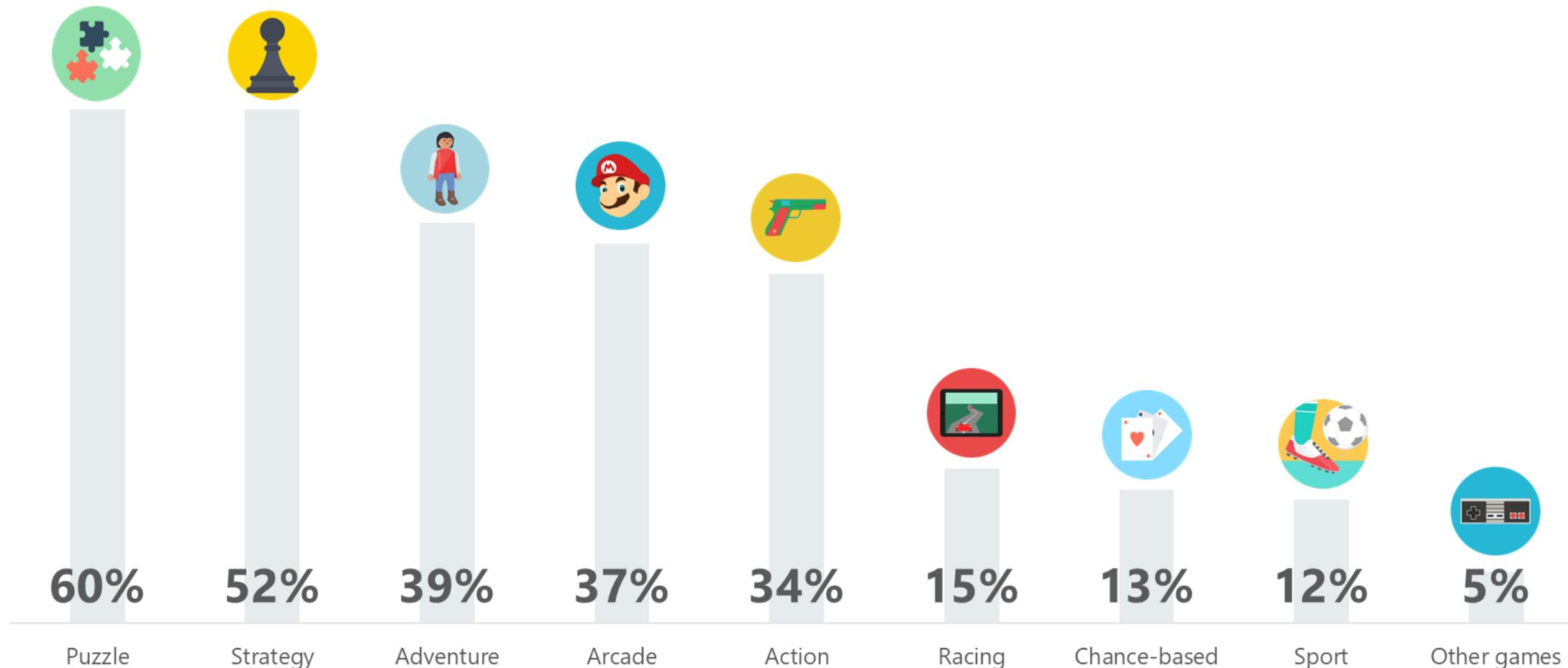
35+ Years Old

Mobile Only	73%	51%
Tablet Only	3%	9%
Both Devices	25%	40%

(*) Q: On which devices do you usually use to play mobile games?

Game types

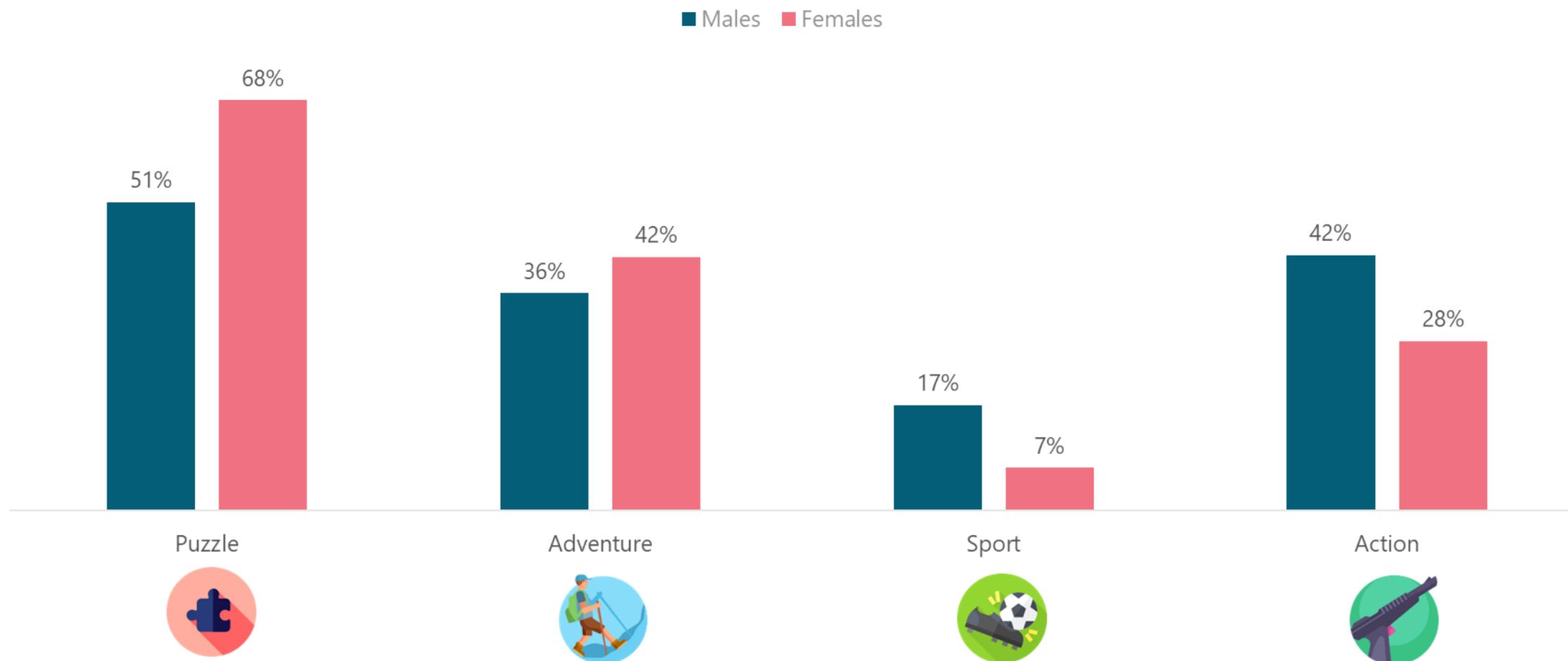
For mobile gamers, Puzzle and Strategy are the two most common types of games, following closely by Adventure, Arcade and Action.



(*) Q: What genres of online games have you played for the past 4 weeks?

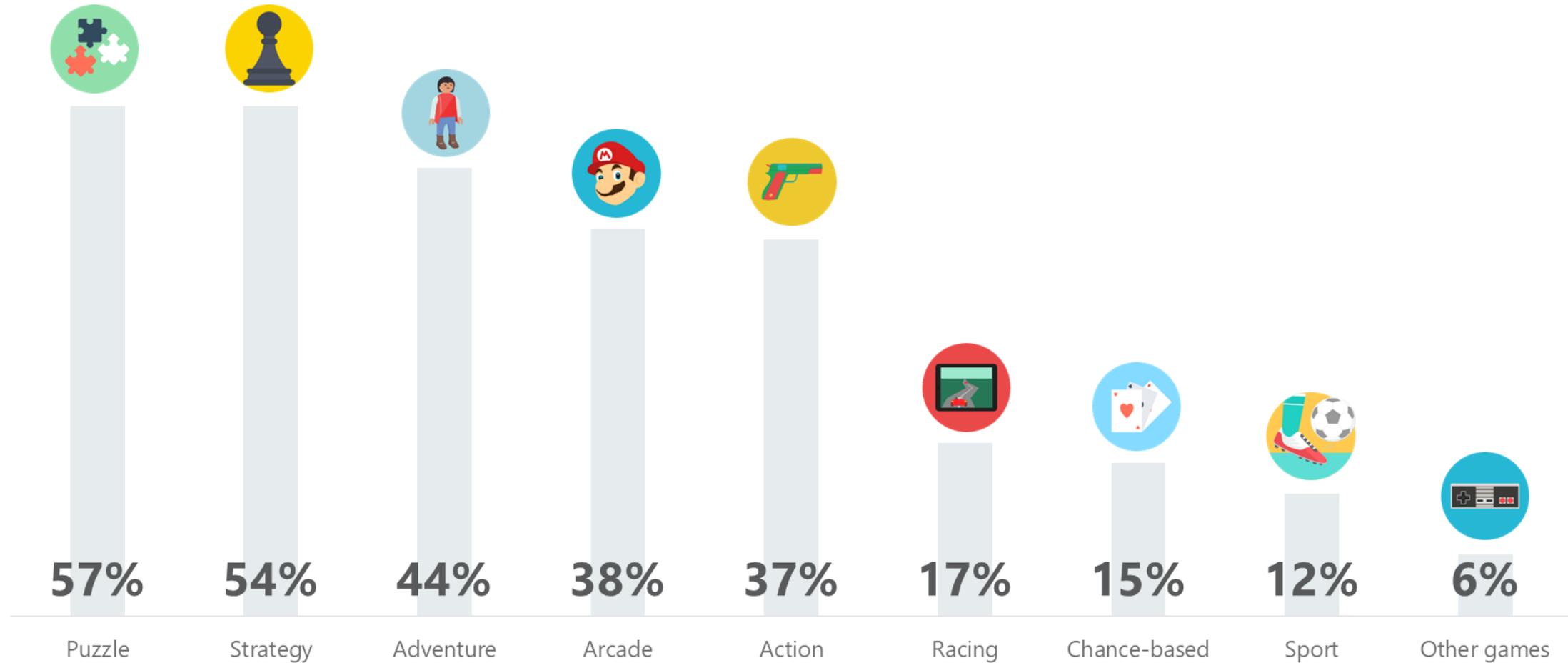
Game types by genders

Comparing to Men, Women are less likely to play Sport and Action, and are leaning toward Puzzle and Adventure.



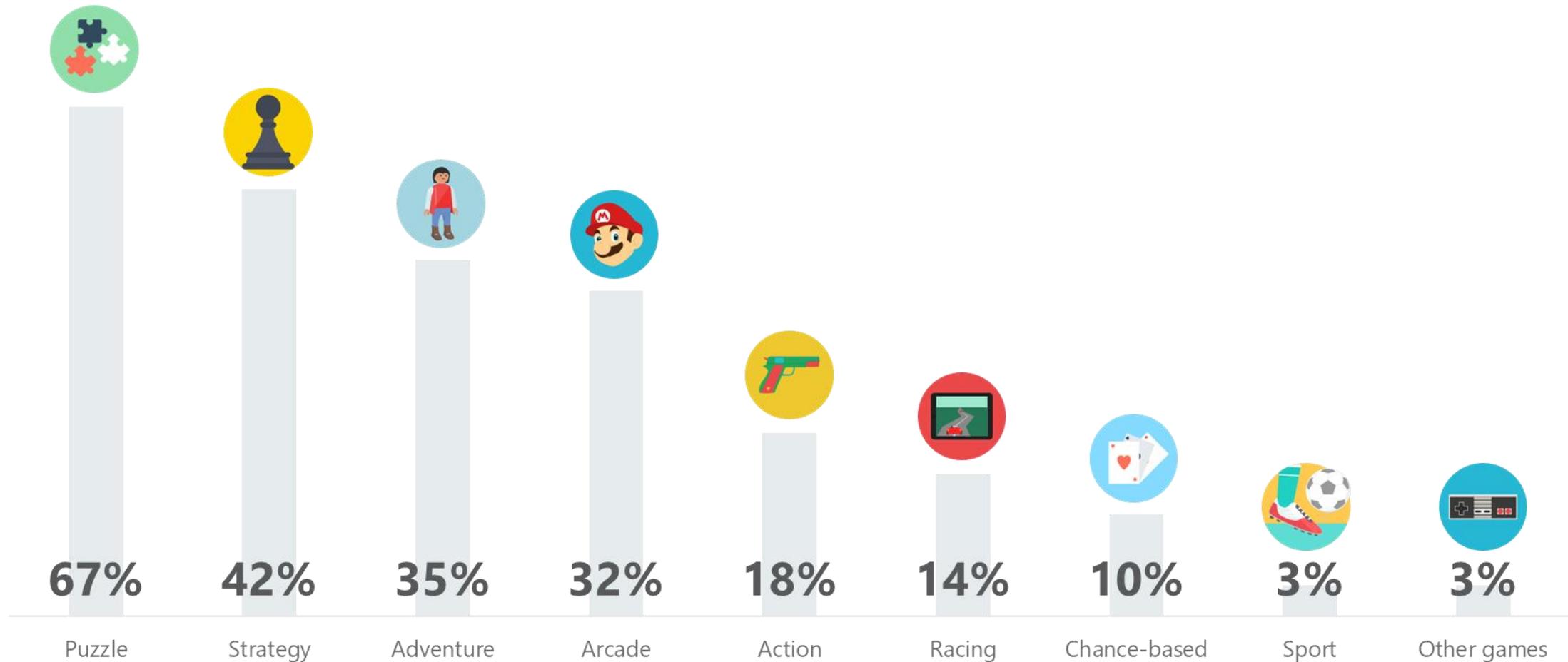
(*) Q: What genres of online games have you played for the past 4 weeks?

Millennials: Game types



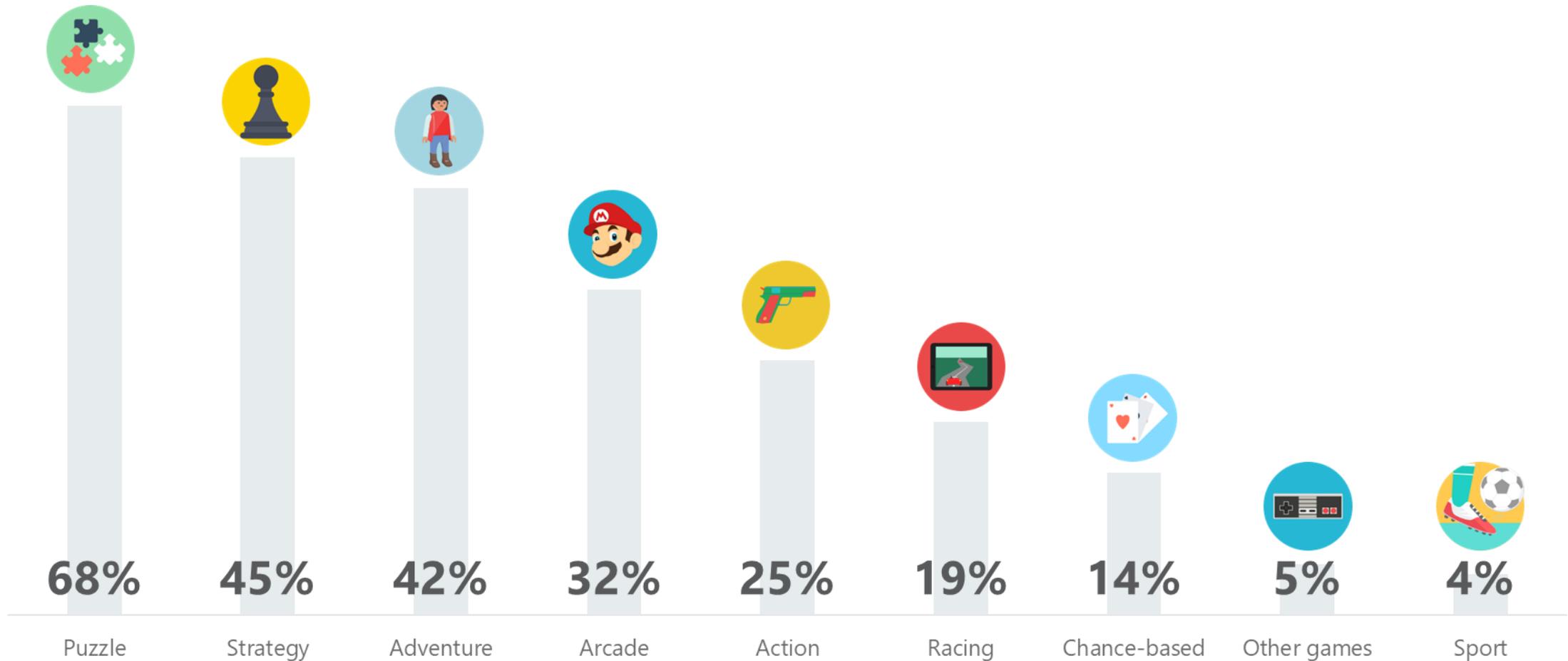
(*) Q: What genres of online games have you played for the past 4 weeks?

Game types played by Moms



(*) Q: What genres of online games have you played for the past 4 weeks?

Game types played by Moms with Kids under 12 years old



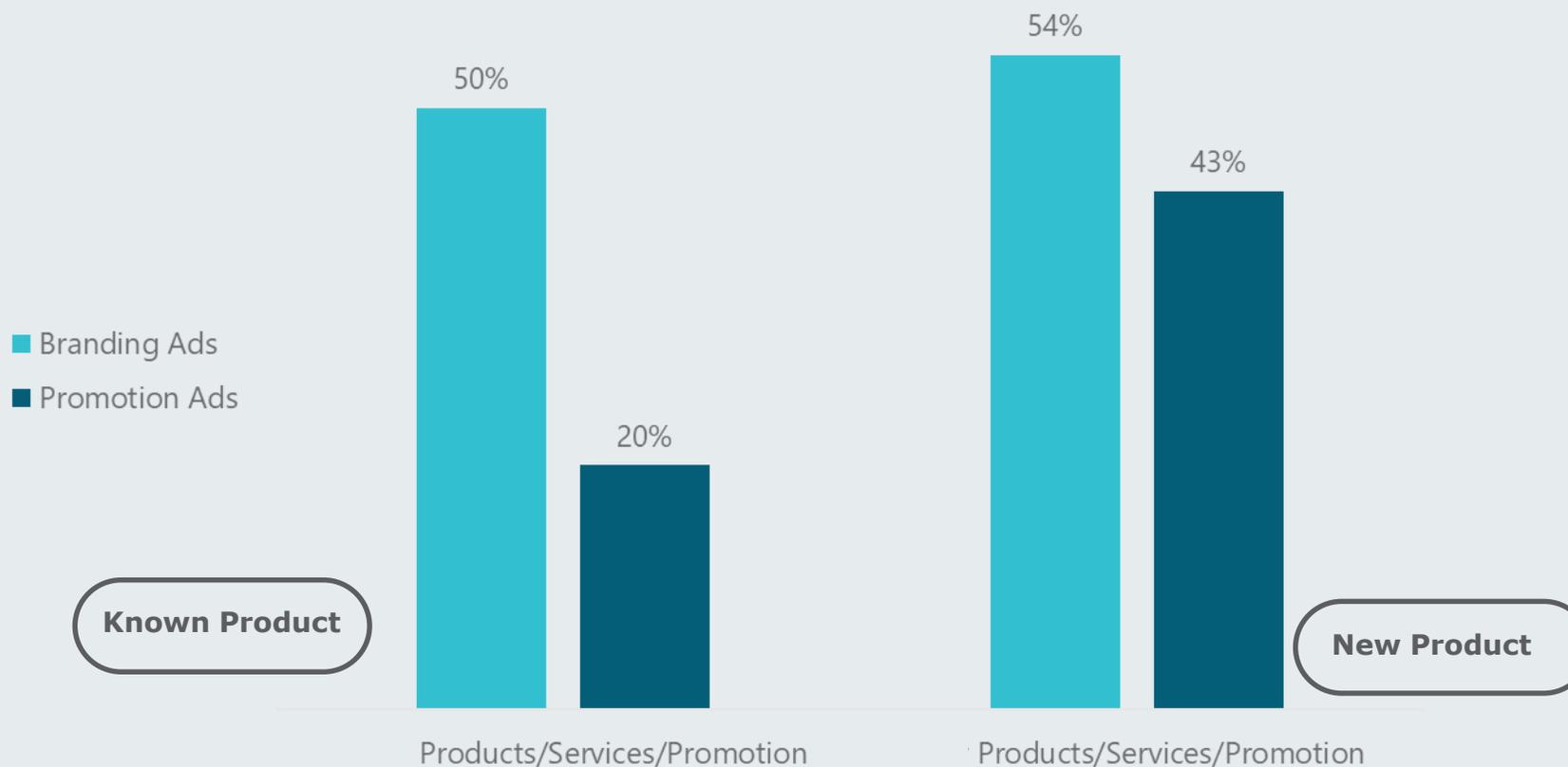
(*) Q: What genres of online games have you played for the past 4 weeks?

The background of the slide is a dark, marbled texture. In the upper left, a person's hands are shown holding a smartphone with a thumbs-up icon on the screen. In the lower right, another person's hands are shown holding a smartphone with a refresh icon on the screen. The overall scene suggests a focus on mobile advertising and user interaction.

Advertiser question #4

WHAT TYPE OF AD AND AD CONTENT
SHOULD I SERVE TO GAMERS?

Acceptance of ad content



Acceptance of ad content

Overall, gamers do not like ads, but if they have to watch/see an ad, many of them are comfortable with ads about new products or services than any other types of ad content.

(*) Q: Which of the following ads information that you are comfortable watching/seeing when you're playing mobile games?

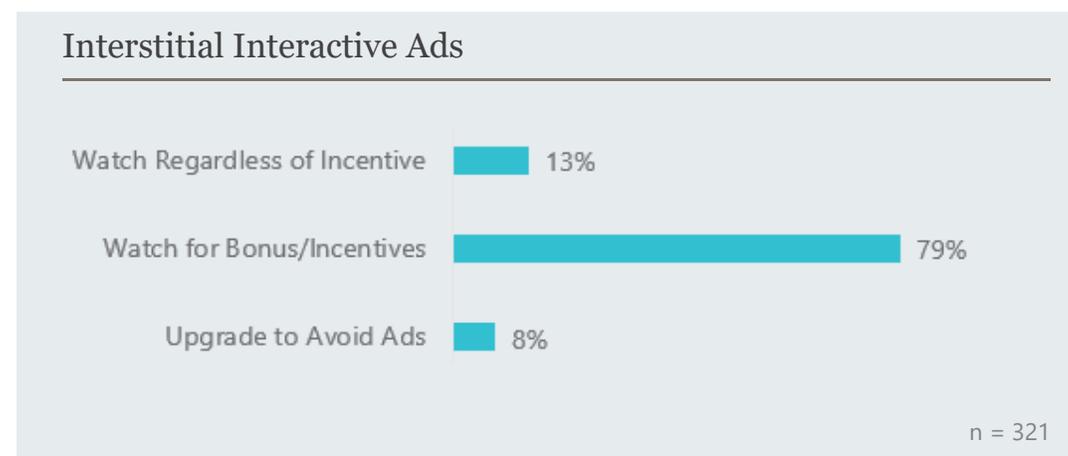
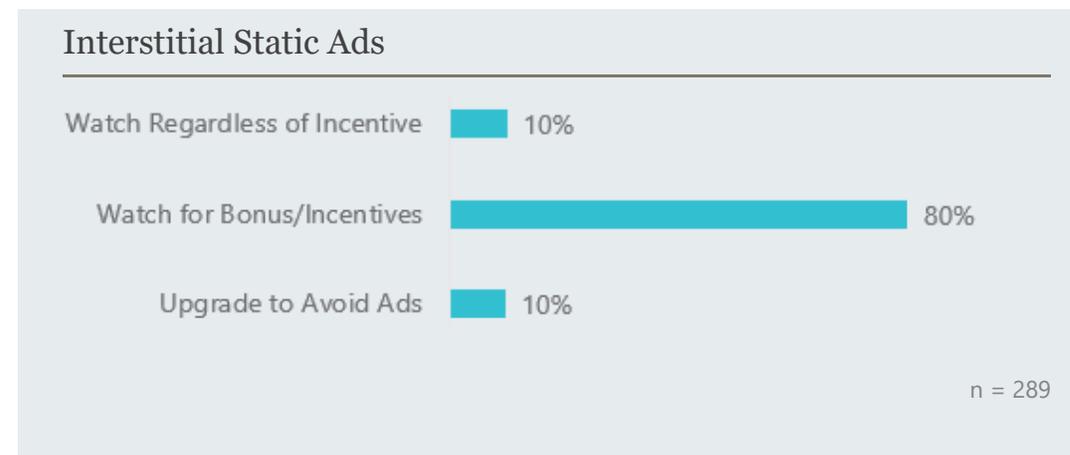
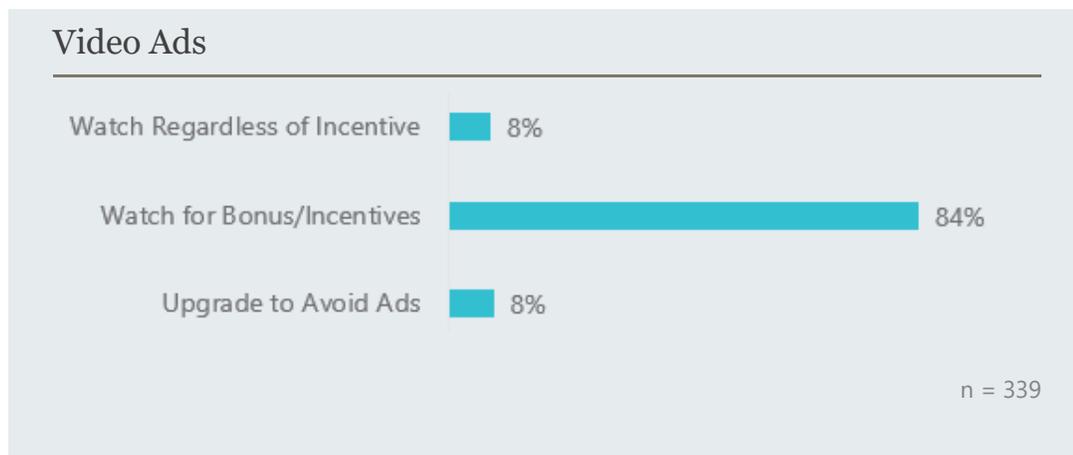
n = 570

Advertiser question #5

WHAT CAN I DO TO ENGAGE GAMERS
WITH MY ADS?

Gamers reactions to in-game ads

If there are incentives/bonus, another large portion of them would choose to watch or see them. (**)

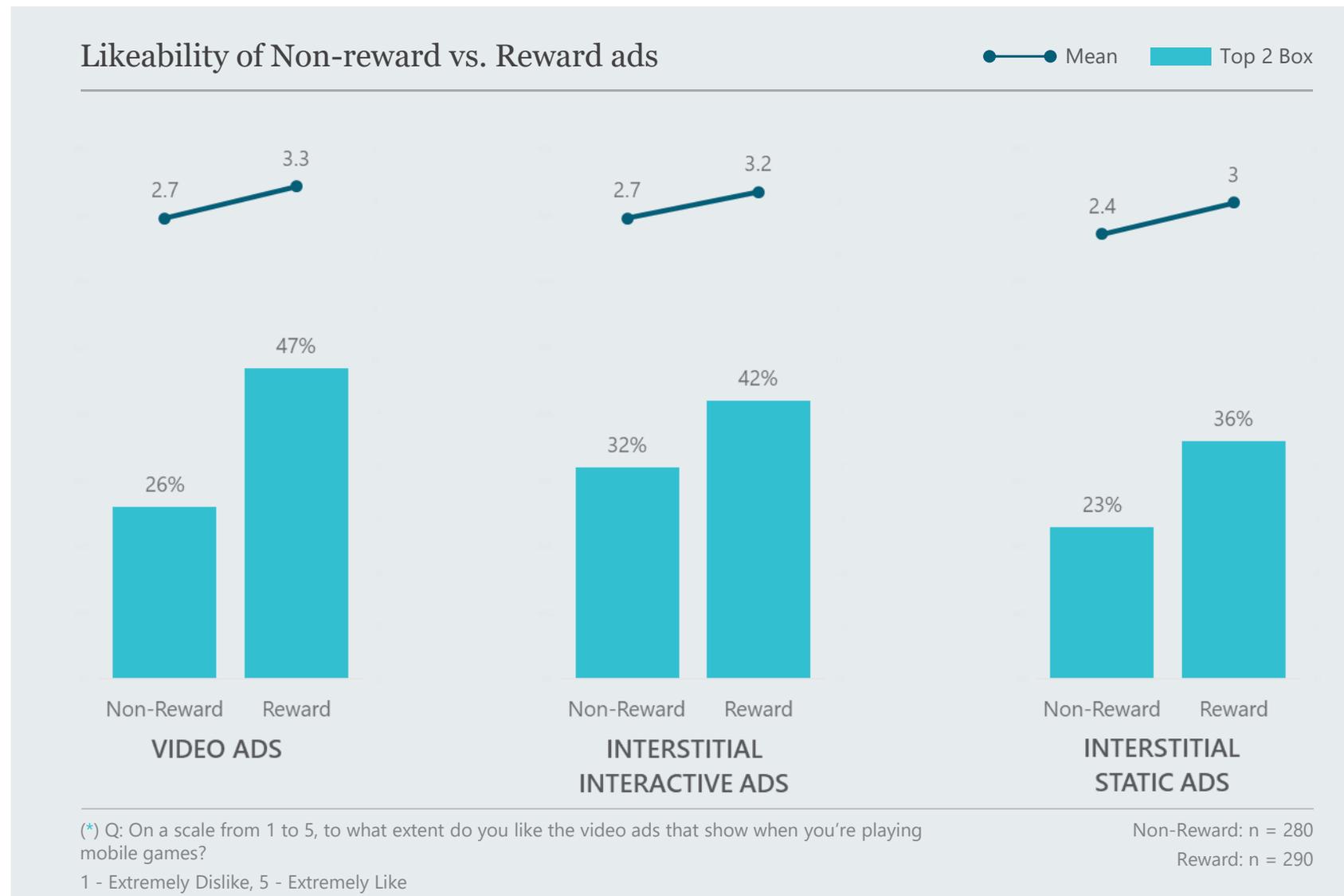


(*) Q: Which of the following action would you most likely to do when you see an ad while playing mobile games?

(**) Exclude people who chose to close/skip ads

The role of reward ads

Rewards make a noticeable difference in how gamers feel about the ads. Regardless of the ad formats, the likeability is remarkably lifted up by adding rewards.



The role of reward for video ads

In addition to shifting up the likability of ads, rewards also increase the tolerated length of Video Ads by 2 seconds.

	LIKEABILITY MEAN SCORE	LIKEABILITY TOP 2 BOX	AVERAGE TOLERATED LENGTH (SECONDS)
NON REWARDED VIDEO ADS n = 280	2.7***	26%***	14***
REWARDED VIDEO ADS n = 290	3.3	47%	16

*** Significantly lower than the rewarded video ads at 99% confidence interval

(*) Q: On a scale from 1 to 5, to what extent do you like the video ads that show when you're playing mobile games?

1 - Extremely Dislike, 5 - Extremely Like



Country summary

WHO CAN I REACH IF I SERVE MY AD INSIDE THE GAME APPS?

- Females and Males up to the age of 54 years old, especially Females (including Moms) and young Males

HOW MUCH FACETIME CAN I HAVE WITH THOSE GAMERS?

- An average of 58 minutes per sessions, several times per day

WHERE AND WHEN CAN I CATCH THOSE GAMERS?

- At home and at night, between 7PM-10PM
- In Puzzle and Strategy games

WHAT TYPES OF AD AND AD CONTENT SHOULD I SERVE TO GAMERS?

- Ads that introduce a new promotion

WHAT CAN I DO TO ENGAGE GAMERS WITH MY ADS?

- Offer rewards for watching ads, especially Video Ads

Fast track to...



Vietnam



Indonesia



Philippines



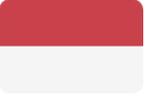
Thailand

Indonesia



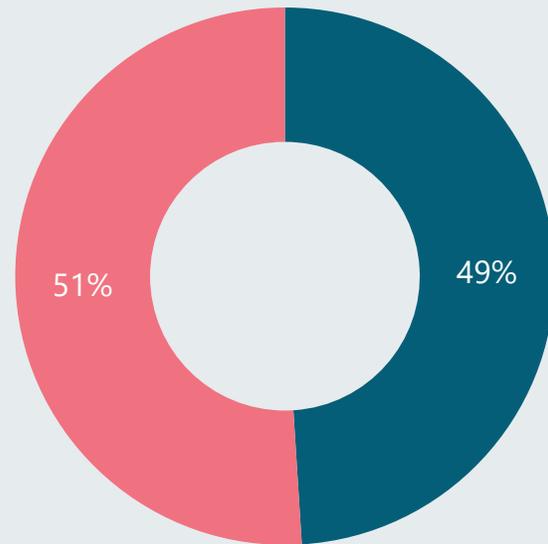
Advertiser question #1

WHO CAN I REACH IF I SERVE MY AD
INSIDE THE GAME APPS?



Gamer demographic

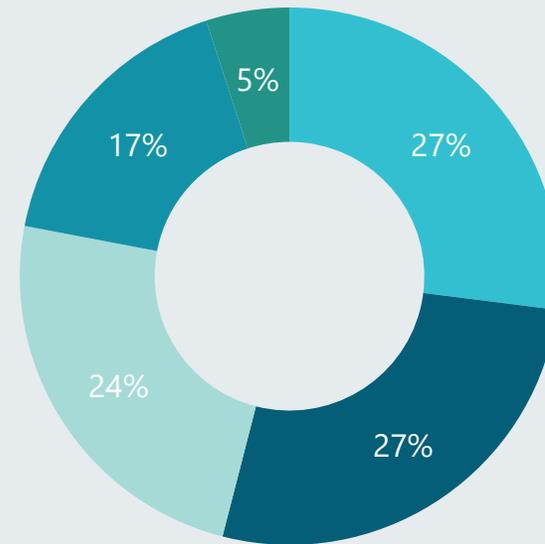
Gamers by gender



■ Males ■ Females

n = 833

Gamers by age groups



■ 16-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55+

n = 833

Mobile gamer penetration

GENDER



55%
Males are Gamers



58%
Females are Gamers

AGE GROUPS



64%
People 16-24
Y/O are Gamers



64%
People 25-34
Y/O are Gamers



63%
People 35-44
Y/O are Gamers



47%
People 45-54
Y/O are Gamers

25%
People 55+ Y/O
are Gamers

TARGET GROUPS IN HIGH DEMAND FOR ADVERTISERS



73%
Males
18-35 Years Old
are Gamers



64%
Females
18-35 Years Old
are Gamers



54%
Moms are
Gamers

Moms as mobile gamers

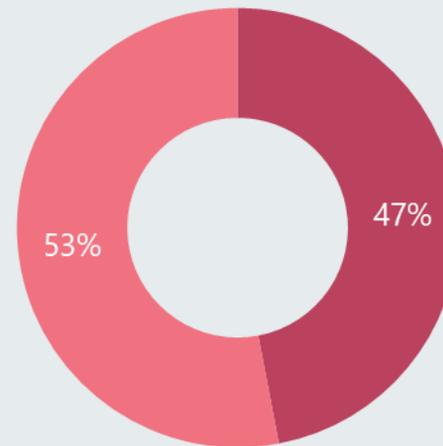
Penetration



54%
of Moms are
gamers

n = 336

Percentage of Moms in Females



■ Moms ■ Females

n = 420

Moms with Kids under 10 years old as mobile gamers

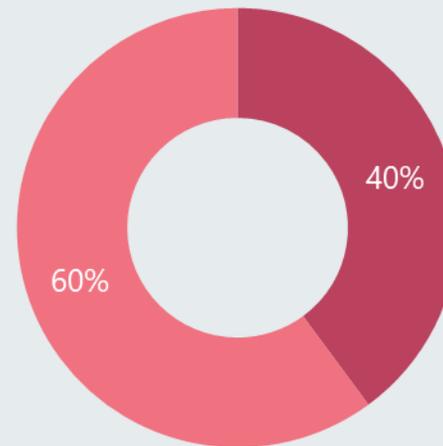
Penetration



56%
of Moms with
Kids age under
10 years old are
gamers

n = 298

Percentage of Moms with Kids under 10 years old in Females



■ Moms ■ Females

n = 420

Millennials as mobile gamers

Penetration

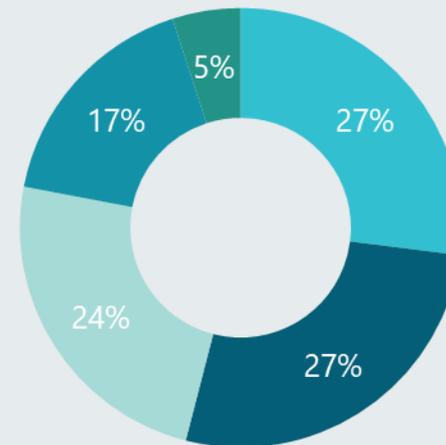
64%

of Millennials
are gamers



n = 356

Percentage of Millennials in mobile gamers



■ 16-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55+

n = 833

Advertiser question #2

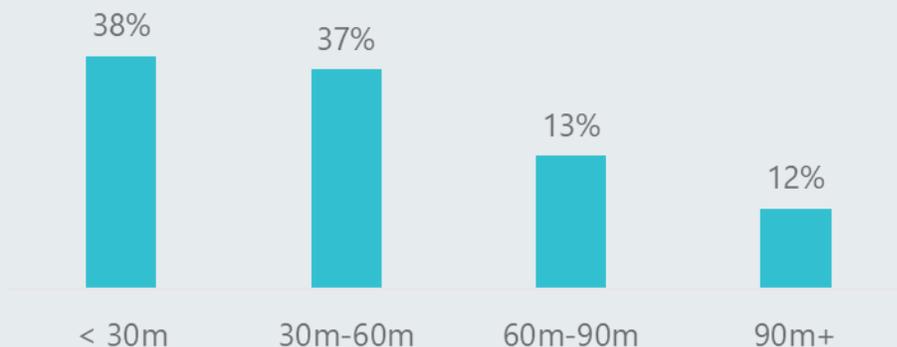
HOW MUCH FACETIME CAN I HAVE WITH
THOSE GAMERS?

Session Time - Overall

Average time per session spent in mobile game apps is 53 minutes, with the large proportion of gamers spends less than 60 minutes each time they open the apps. Although it is harder to catch Males than Females with advertising in-game apps, the facetime that advertisers can have with Males is longer as they tend to spend more time in the apps.

Time per each session

Average time/session:
53 minutes

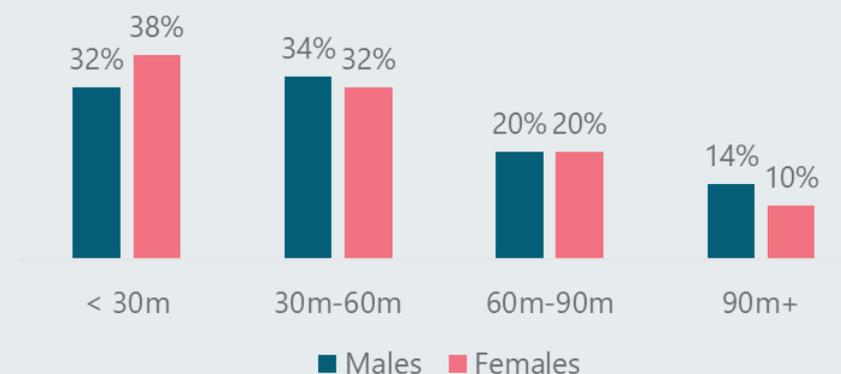


(*) Q: On average, how much time do you spend playing on each session? n = 833

Time per each session by gender

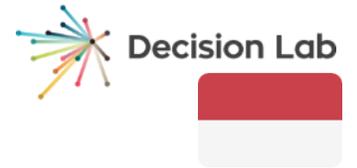
Average time/session:

■ 56 minutes
■ 50 minutes

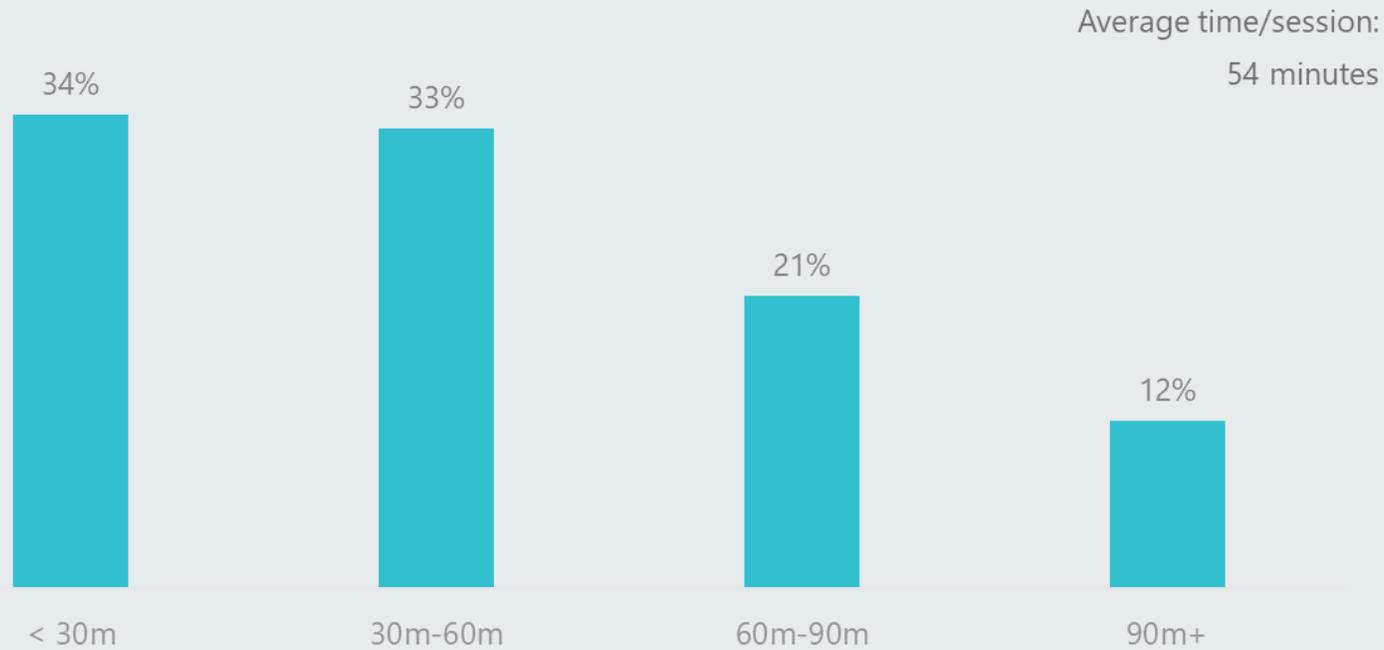


(*) Q: On average, how much time do you spend playing on each session? n = 833

Millennials – Session Time

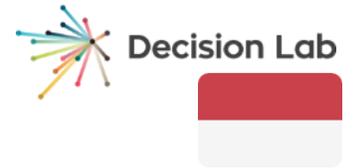


Time spent each session of Millennials



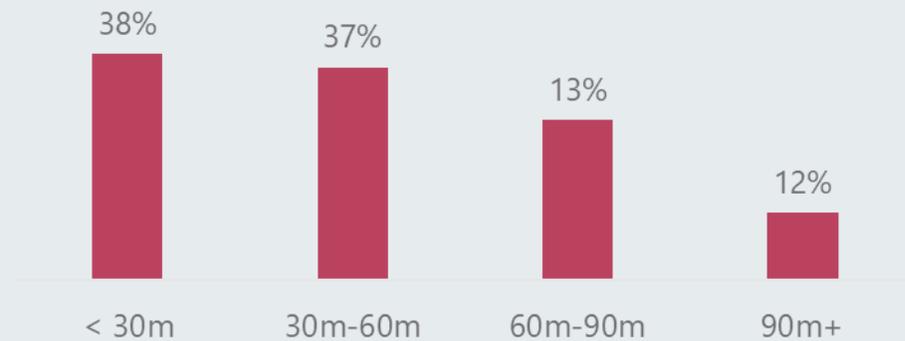
n = 229

Moms – Session Time



Time per each session of Moms

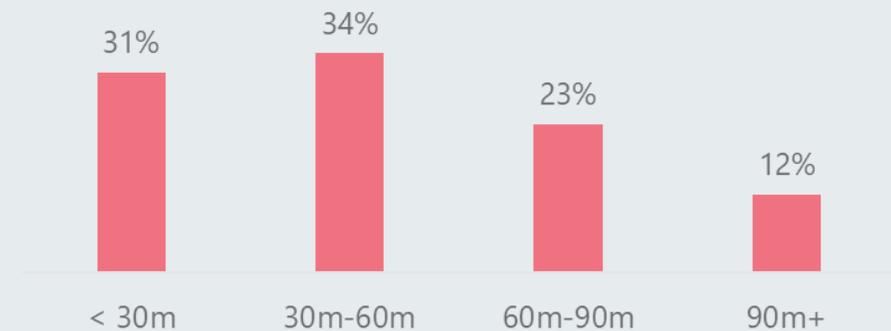
Average time/session:
53 minutes



(*) Q: On average, how much time do you spend playing on each session? n = 198

Time per each session of Moms with Kids under 10 years old

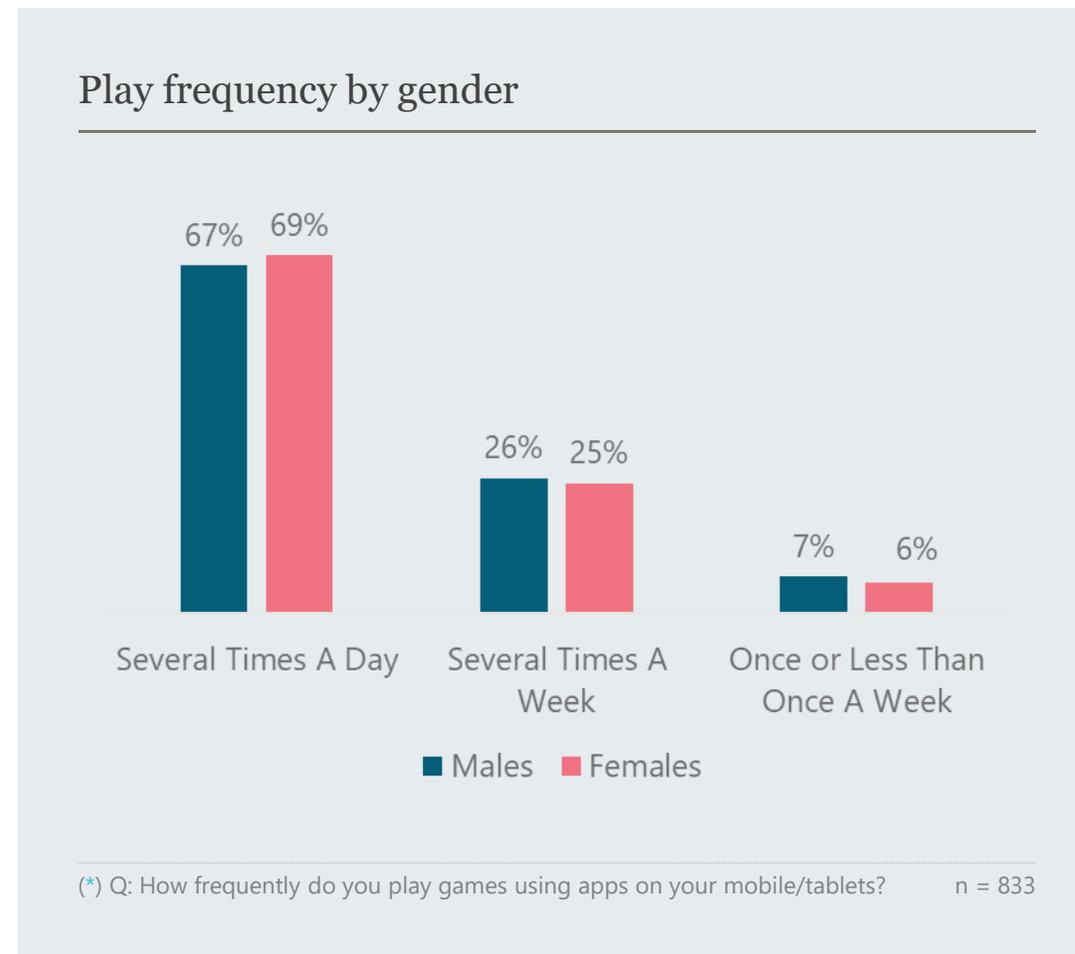
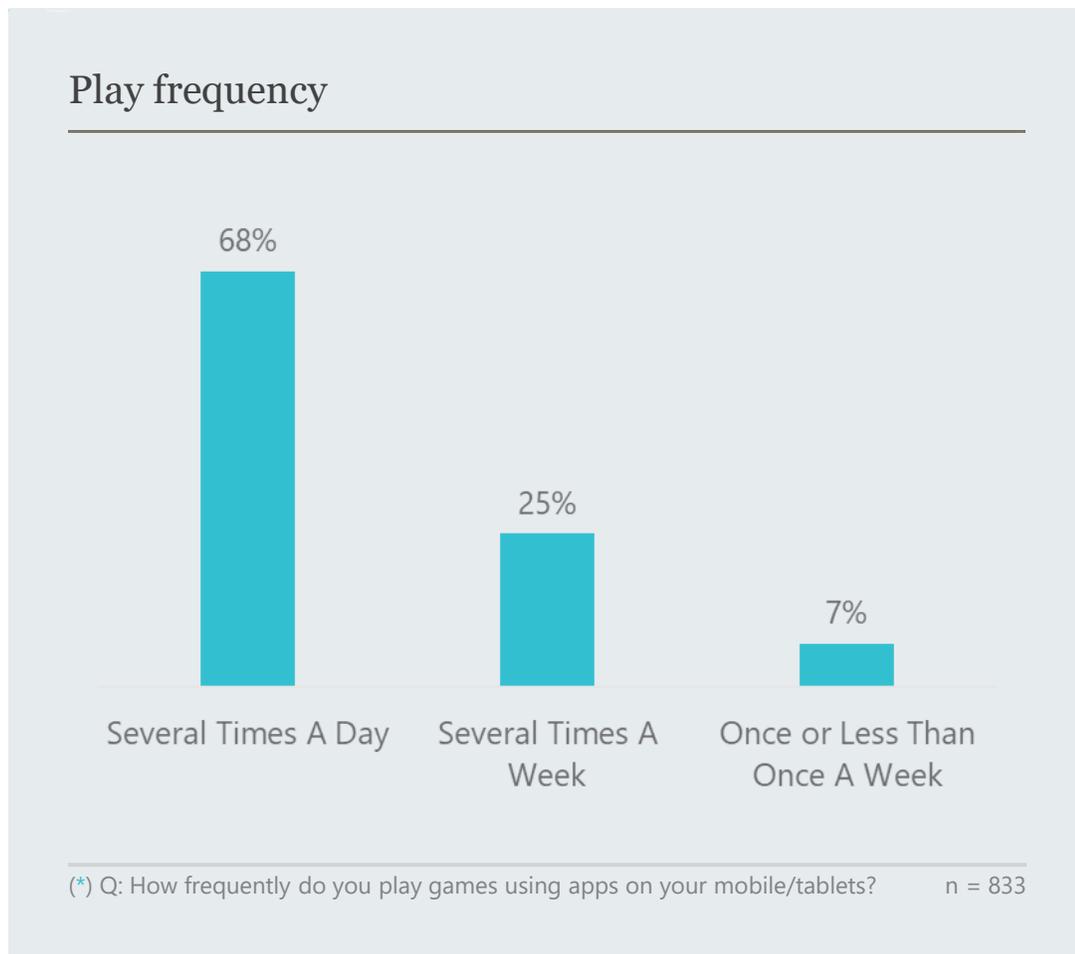
Average time/session:
55 minutes



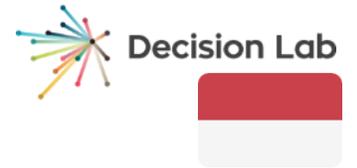
(*) Q: On average, how much time do you spend playing on each session? n = 168

Frequency of playing

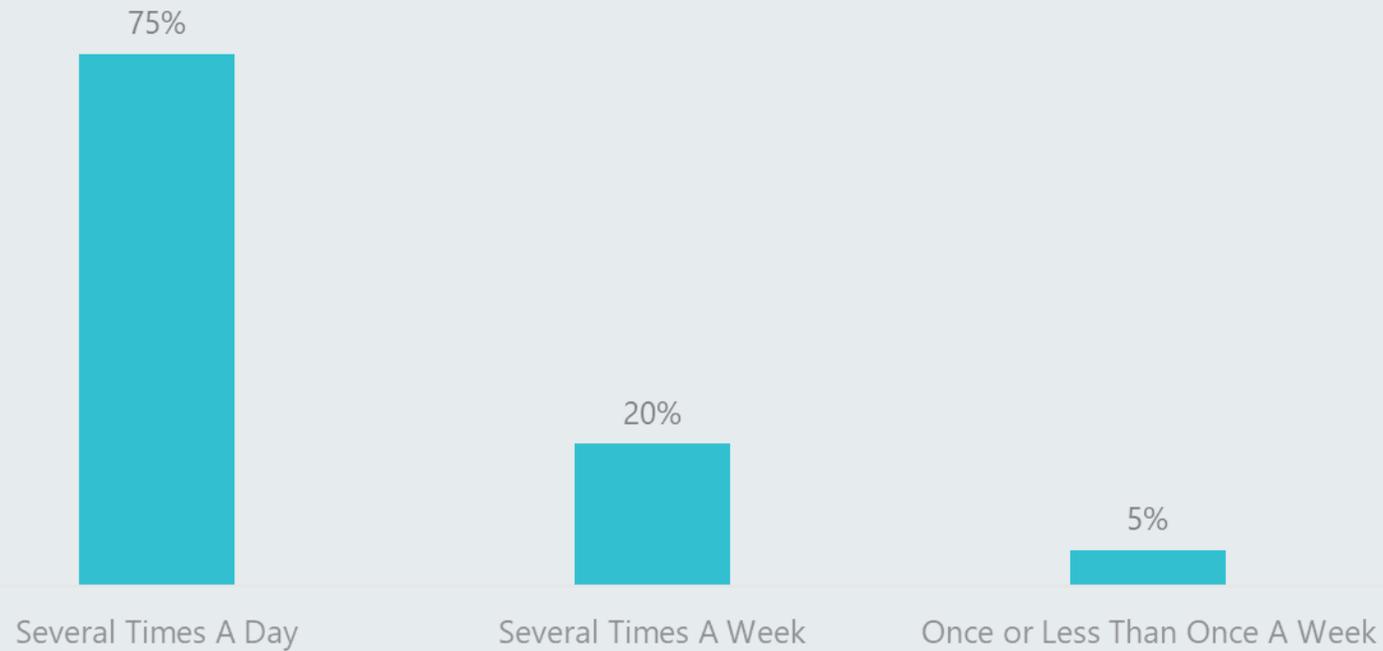
Mobile games playing occurs with high frequency regardless of genders. Hence, users watch ads multiple times a day.



Frequency of playing of Millennials

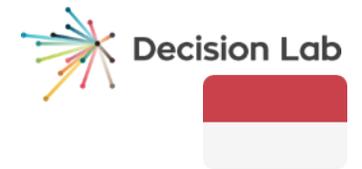


Play frequency of Millennials

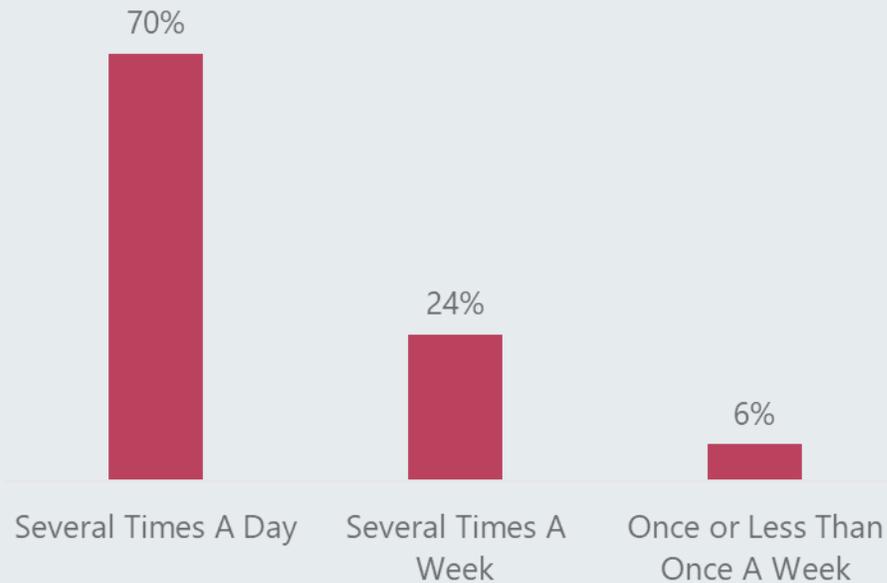


n = 229

Frequency of playing of Moms

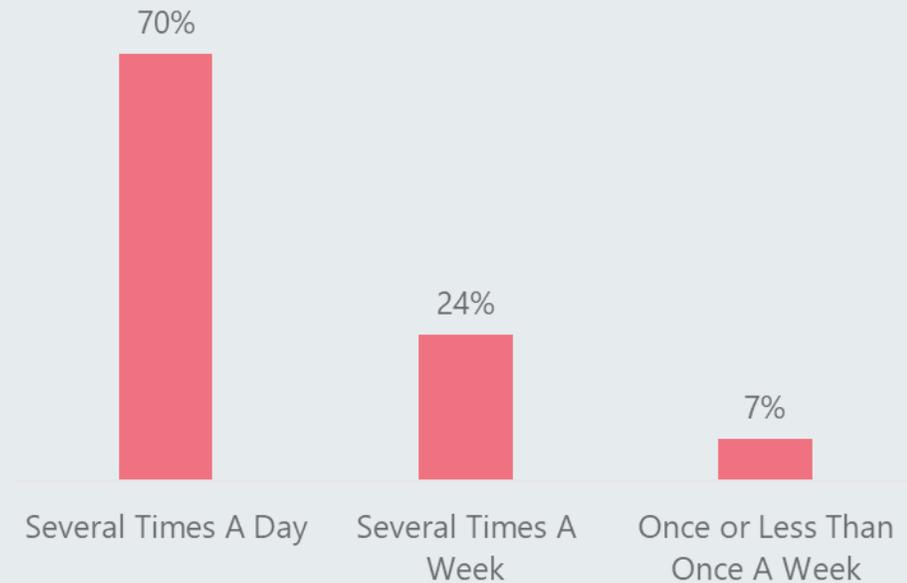


Play frequency of Moms

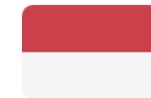


(*) Q: How frequently do you play games using apps on your mobile/tablets? n = 198

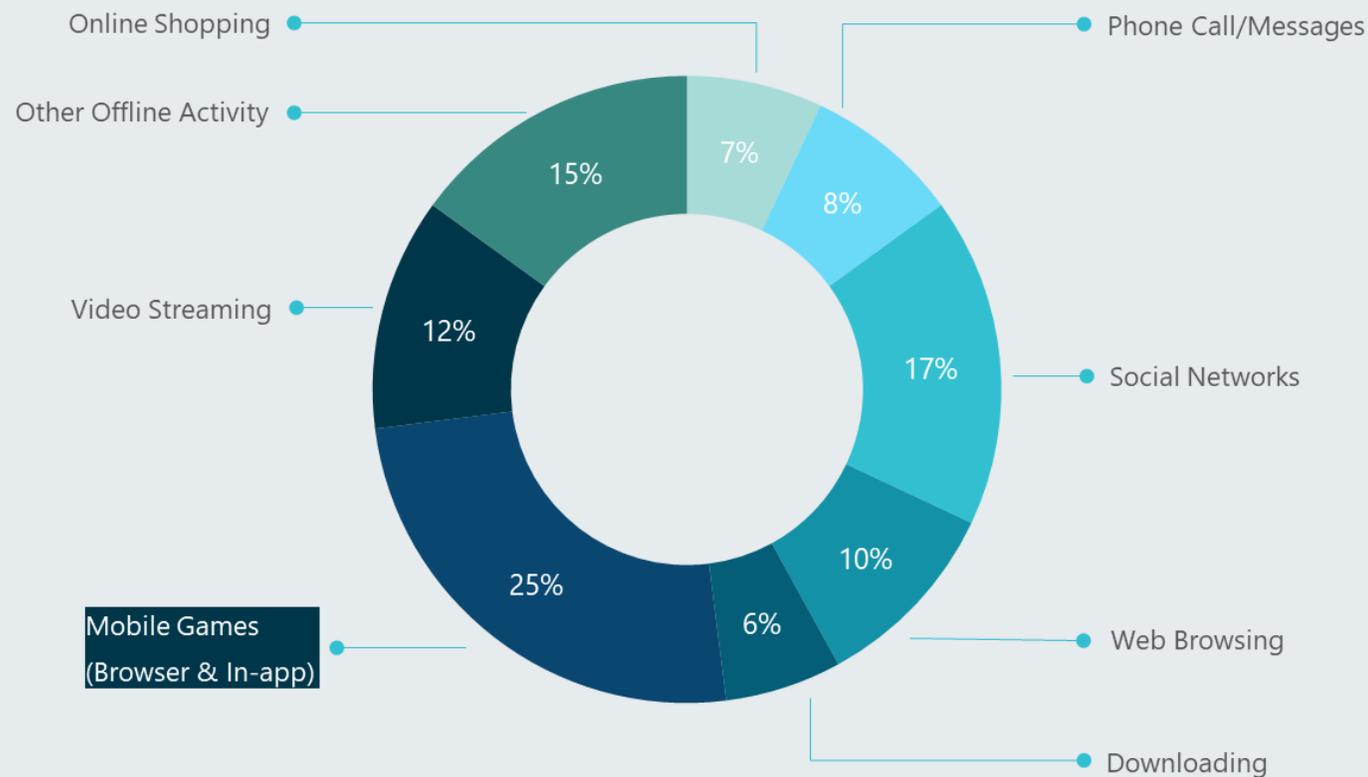
Play frequency of Moms with Kids under 10 years old



(*) Q: How frequently do you play games using apps on your mobile/tablets? n = 168



Share of time on mobile



Share of time on mobile

At 25%, majority of time spent by users on mobile is on gaming. Therefore, providing a strong platform for brands to engage the user via ads multiple times.

(*) Q: Thinking about the last 24 hours, how much time do you spend on your mobile for the following activities?

Advertiser question #3

WHERE AND WHEN CAN I CATCH THOSE GAMERS?



Location and time of playing

Gamers mostly play games at home and in the evening. 7PM-10PM is the golden time to catch them.

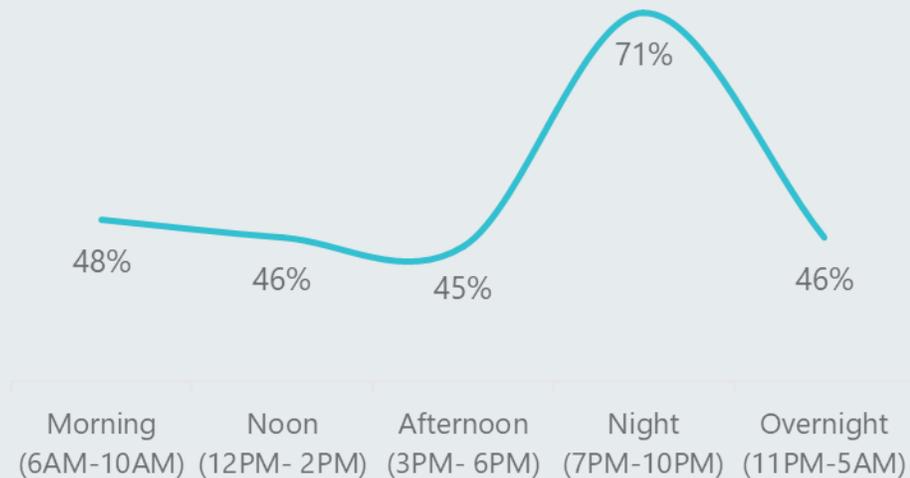
Location to play mobile games



(*) Q: Where are you when you open the game apps and play?

n = 833

Time of playing

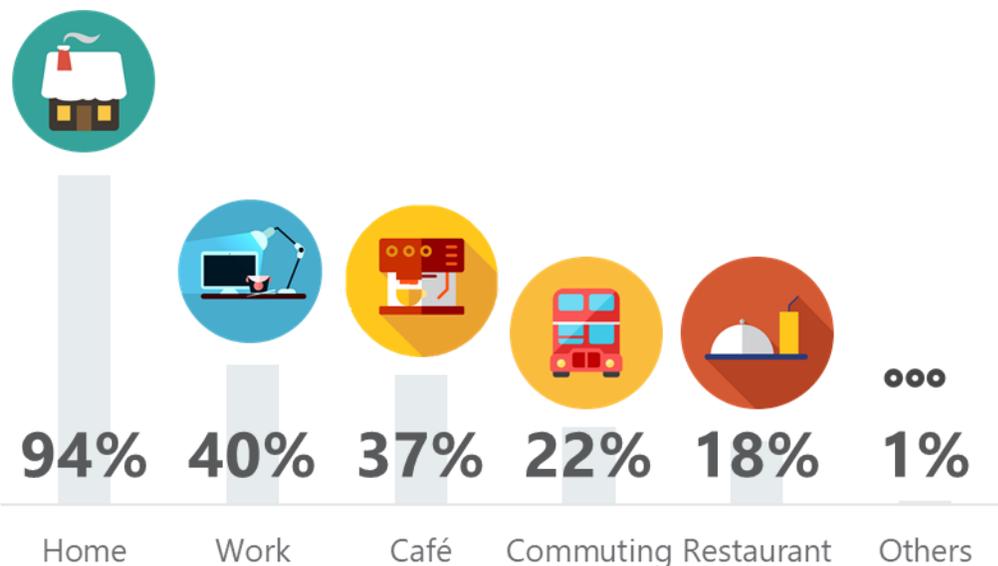


(*) Q: At what time of the day do you play games in-app on mobile?

n = 833

Location and time of playing of Males

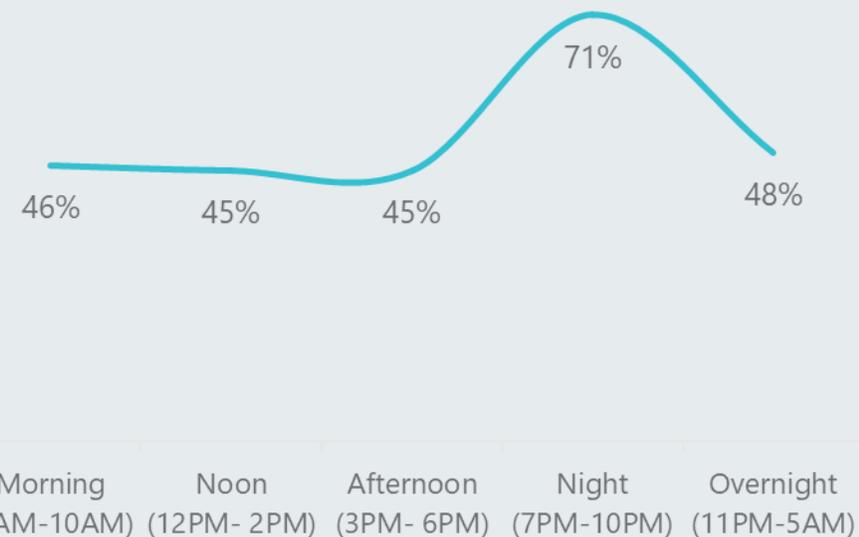
Location to play mobile games



(*) Q: Where are you when you open the game apps and play?

n = 412

Time of playing



(*) Q: At what time of the day do you play games in-app on mobile?

n = 412

Location and time of playing of Females

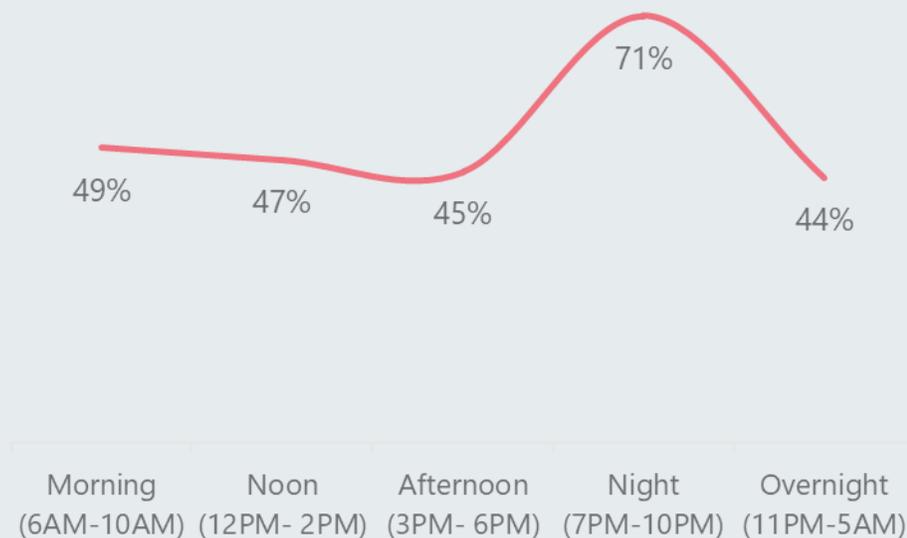
Location to play mobile games



(*) Q: Where are you when you open the game apps and play?

n = 420

Time of playing



(*) Q: At what time of the day do you play games in-app on mobile?

n = 420

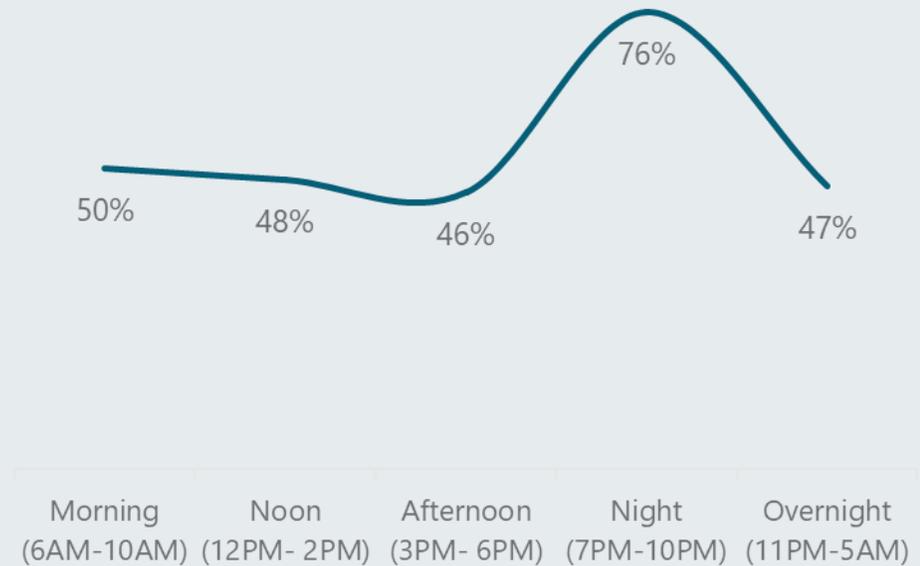
Location and time of playing of Millennials

Location to play mobile games



(*) Q: Where are you when you open the game apps and play? n = 229

Time of playing



(*) Q: At what time of the day do you play games in-app on mobile? n = 229

Location and time of playing of Moms

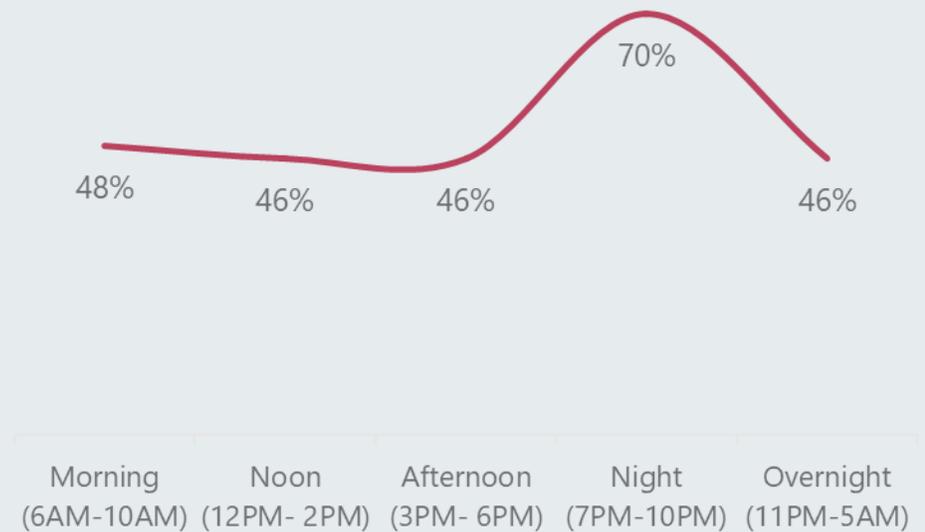
Location to play mobile games



(*) Q: Where are you when you open the game apps and play?

n = 198

Time of playing

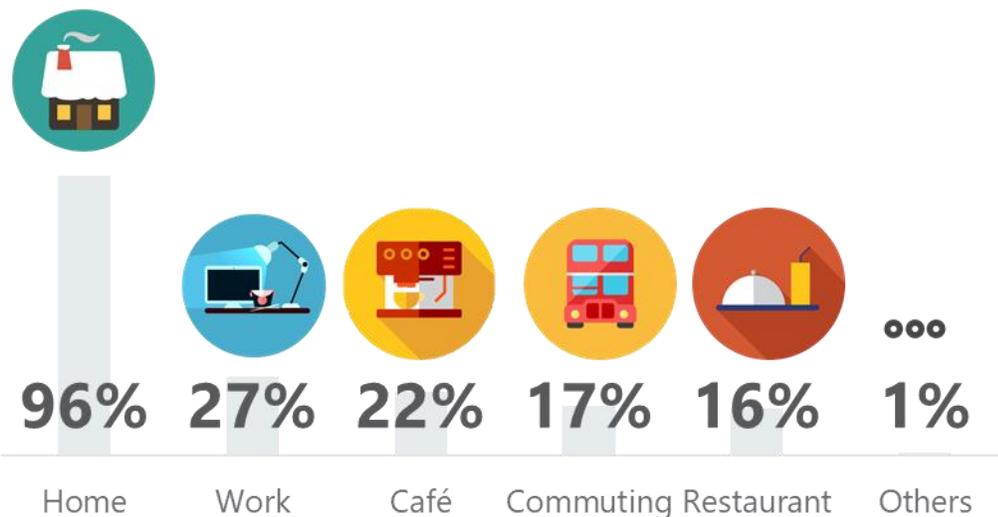


(*) Q: At what time of the day do you play games in-app on mobile?

n = 198

Location and time of playing of Moms with Kids under 10 years old

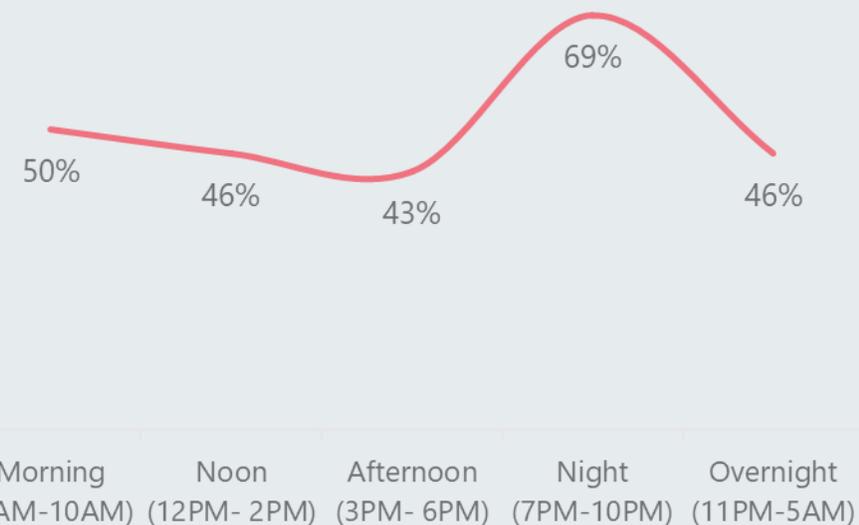
Location to play mobile games



(*) Q: Where are you when you open the game apps and play?

n = 168

Time of playing

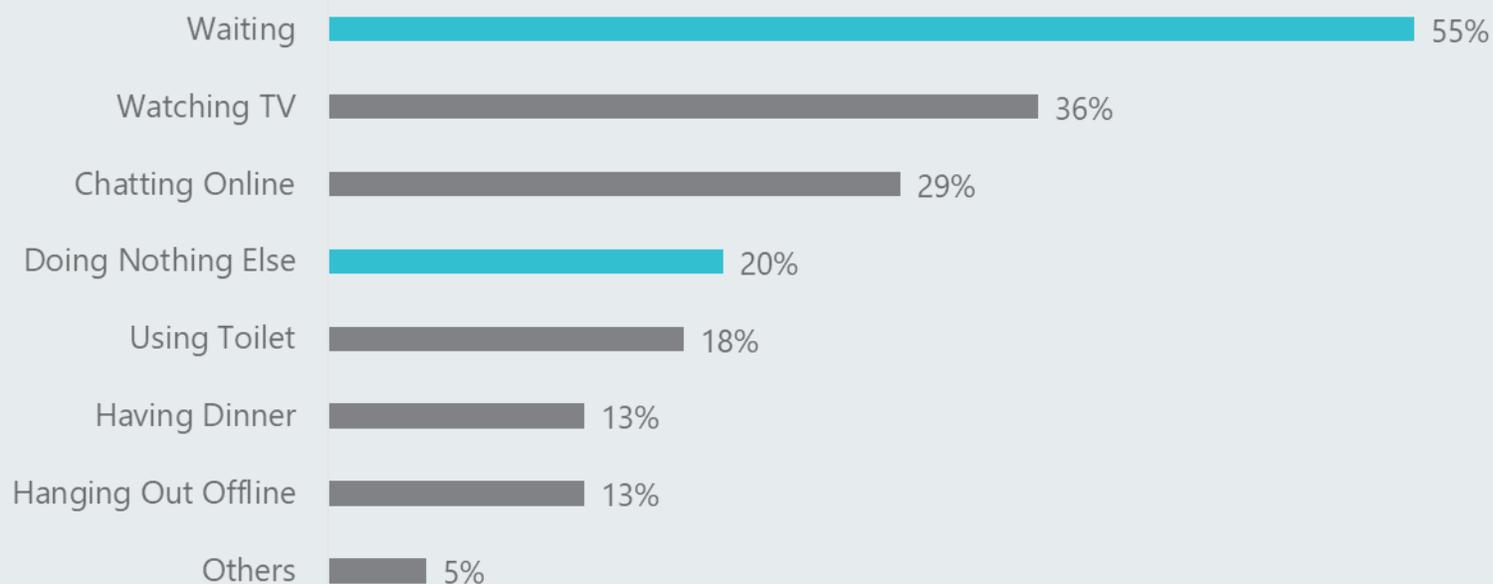


(*) Q: At what time of the day do you play games in-app on mobile?

n = 168

Multi-tasking while playing mobile games at Home

Top 4 activities while playing games at Home



A high proportion of gamers opens the game apps when the distraction is minimal, such as waiting for something or when doing nothing else.

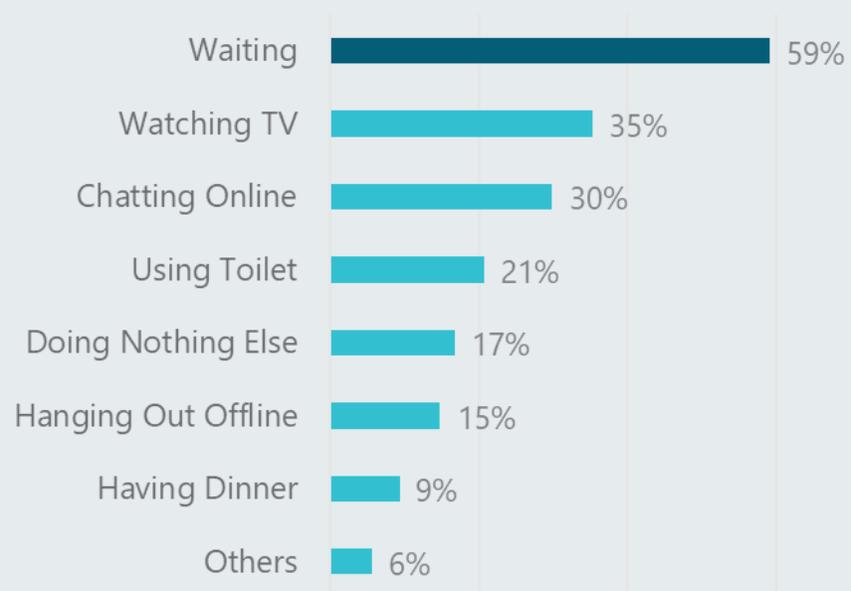
Hence, there is a good chance to capture their attention to games, and subsequently to the ads.

(*) Q: What do you most often do while playing in-app games?

n = 796

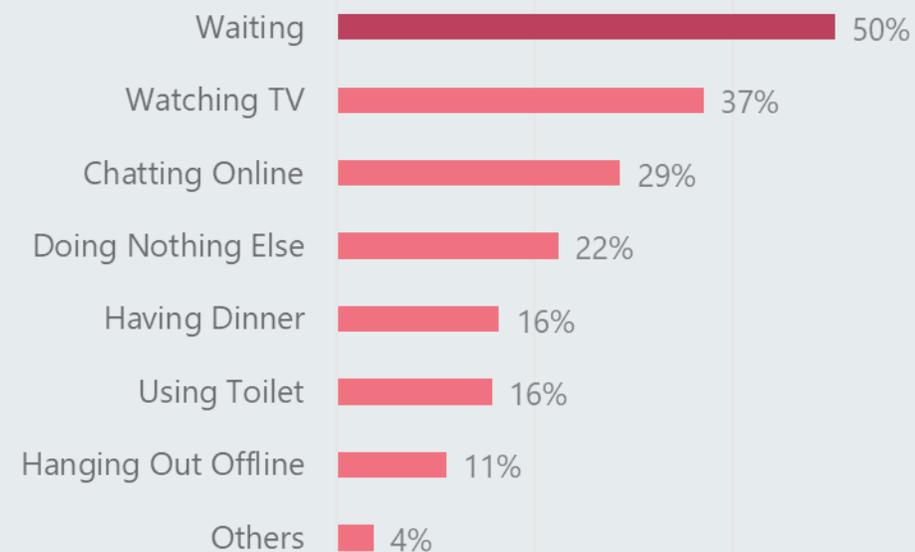
Multi-tasking while playing mobile games at Home by gender

Top 4 activities while playing games at Home for Males



n = 390

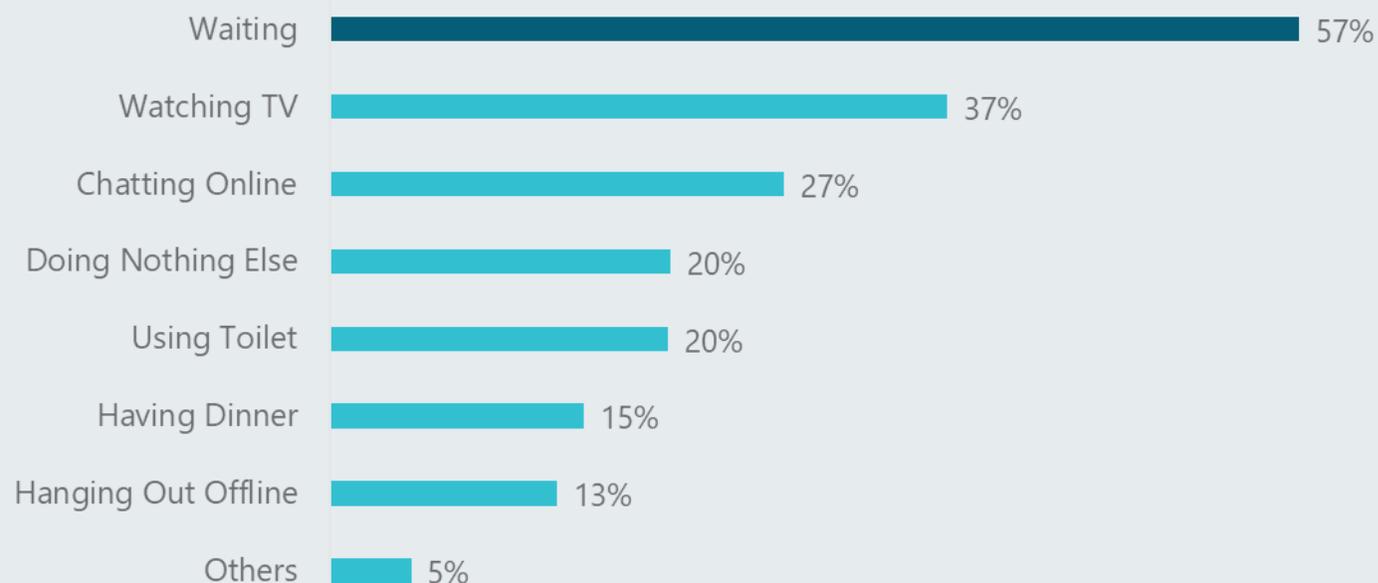
Top 4 activities while playing games at Home for Females



n = 407

Millennials: Multi-tasking while playing mobile games at Home

Top 4 activities while playing games at Home for Millennials

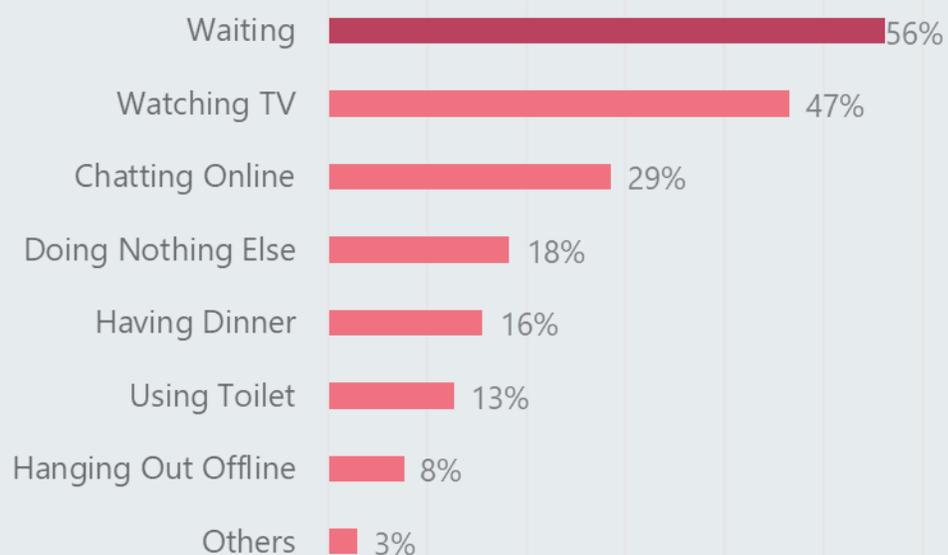


(*) Q: What do you most often do while playing in-app games?

n = 220

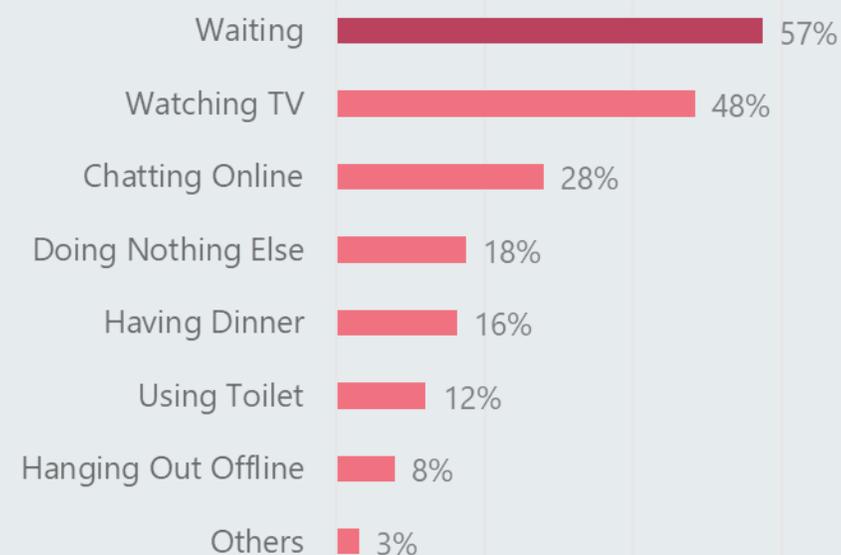
Moms: Multi-tasking while playing mobile games at Home

Top 4 activities while playing games at home for Moms



n = 190

Top 4 activities while playing games at home for Moms with Kids younger than 10 years old



n = 161

Device usage

Mobiles remain the most crucial devices where advertisers can reach their audiences in mobile game apps. Tablets are more popular amongst older group of gamers, but still accounts for a very small proportion.

Devices used when playing mobile games



71% Mobile Only



5% Tablet Only



24% Both Devices

Devices used by age groups when playing mobile games



< 35 Years Old



35+ Years Old

Mobile Only

75%

67%

Tablet Only

3%

7%

Both Devices

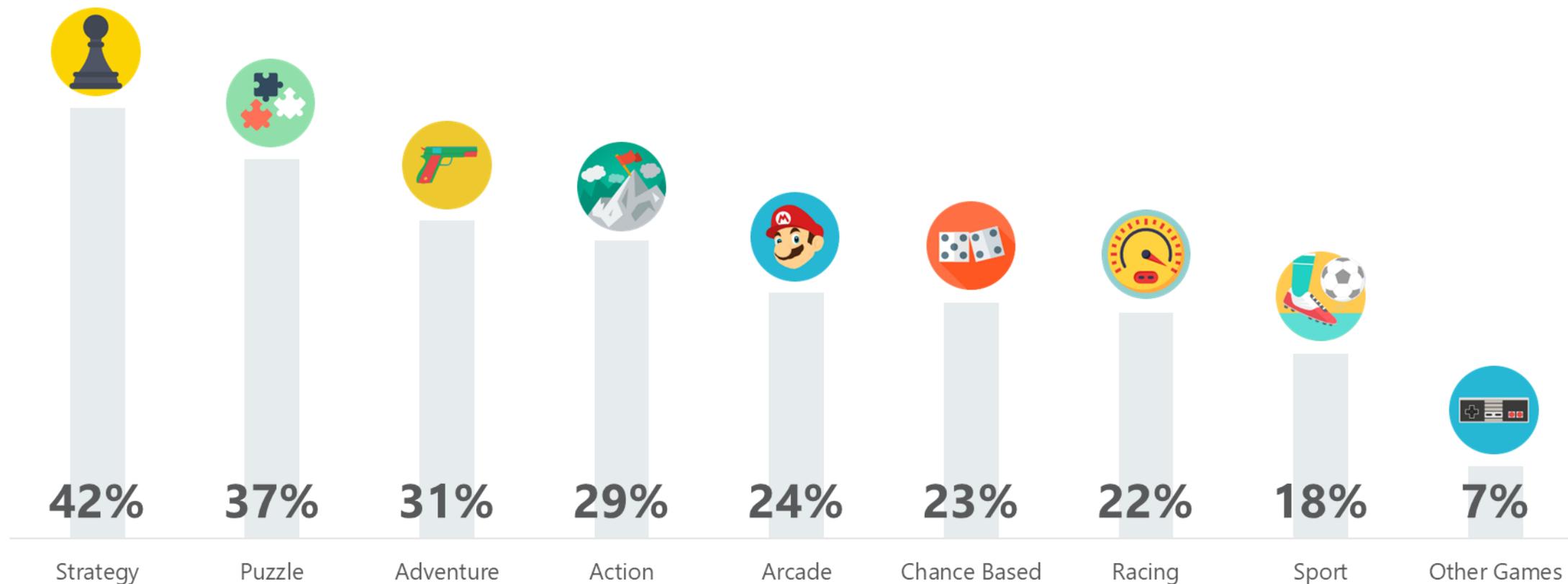
22%

26%

(*) Q: On which devices do you usually use to play mobile games?

Game types

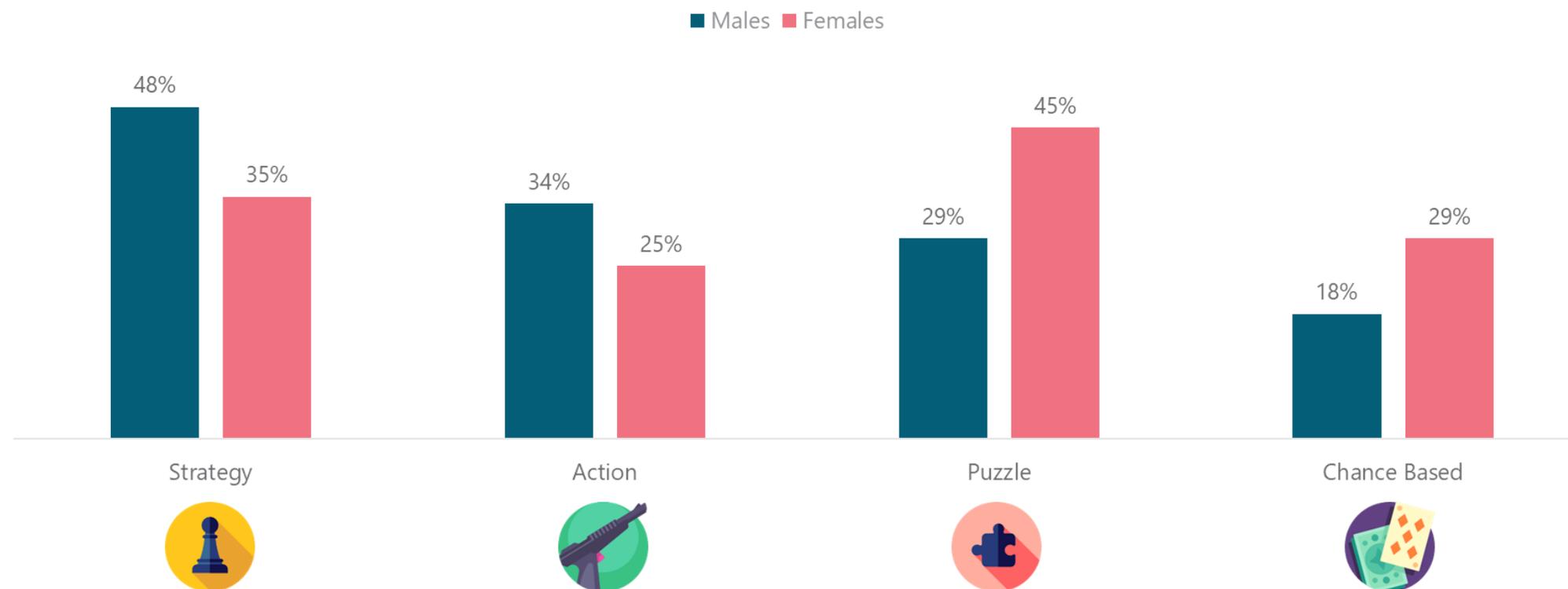
The most popular game types are Strategy, Puzzle, Adventure and Action.



(*) Q: What genres of online games have you played for the past 4 weeks?

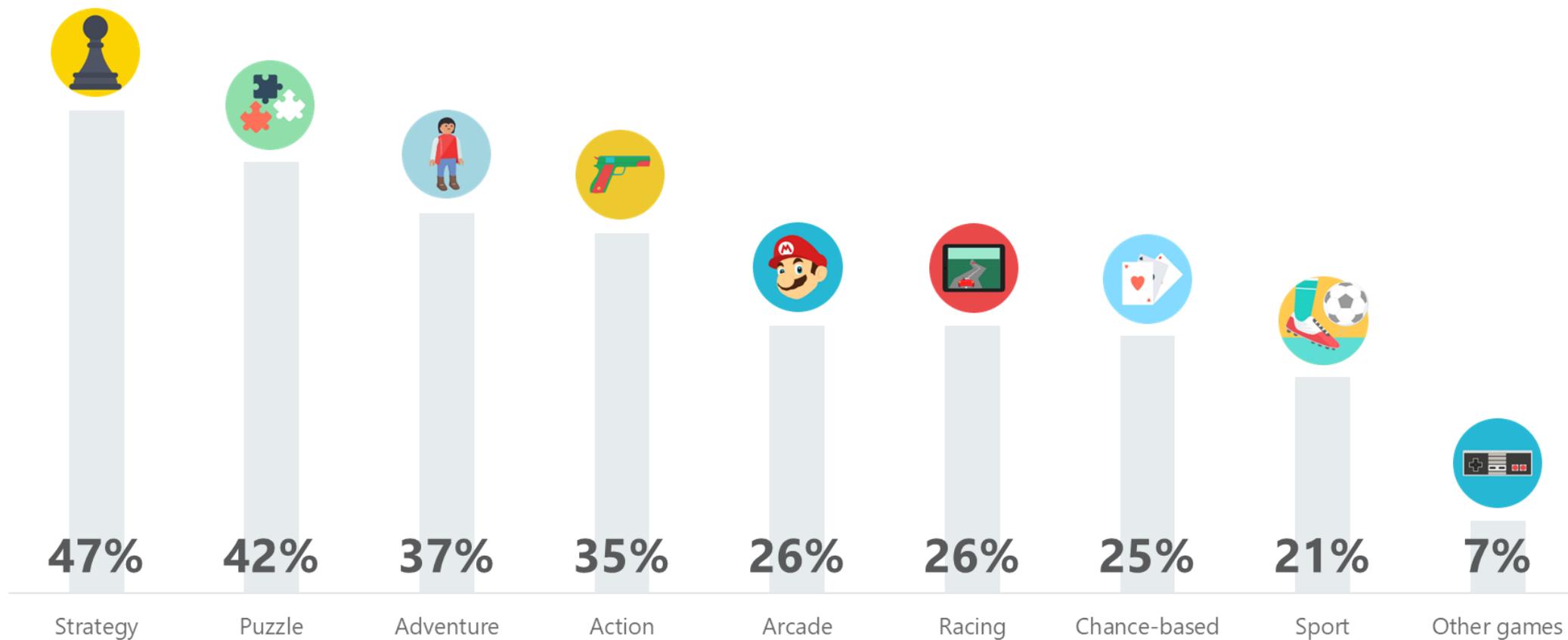
Game types by gender

While Females can be reached in Puzzle and Chance-based games, Strategy and Action games are those most Males are playing.



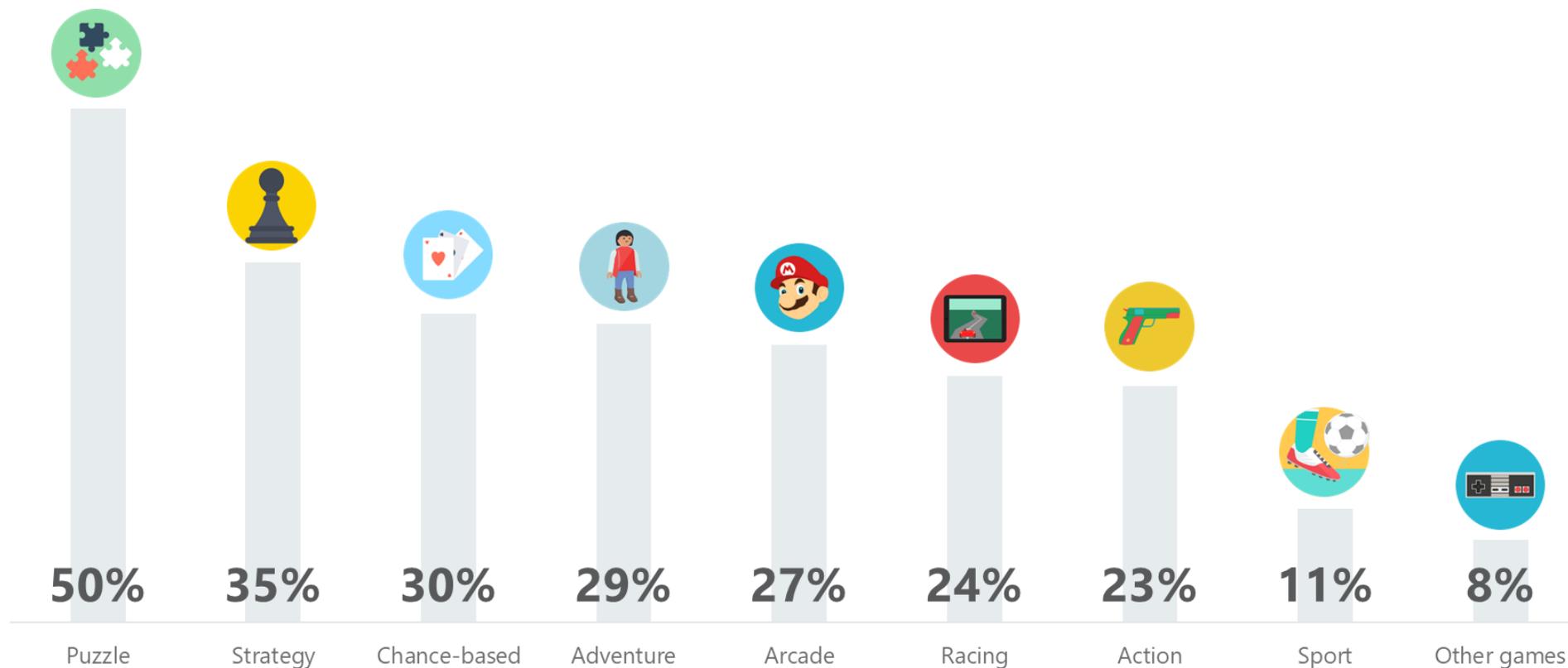
(*) Q: What genres of online games have you played for the past 4 weeks?

Millennials: Game types



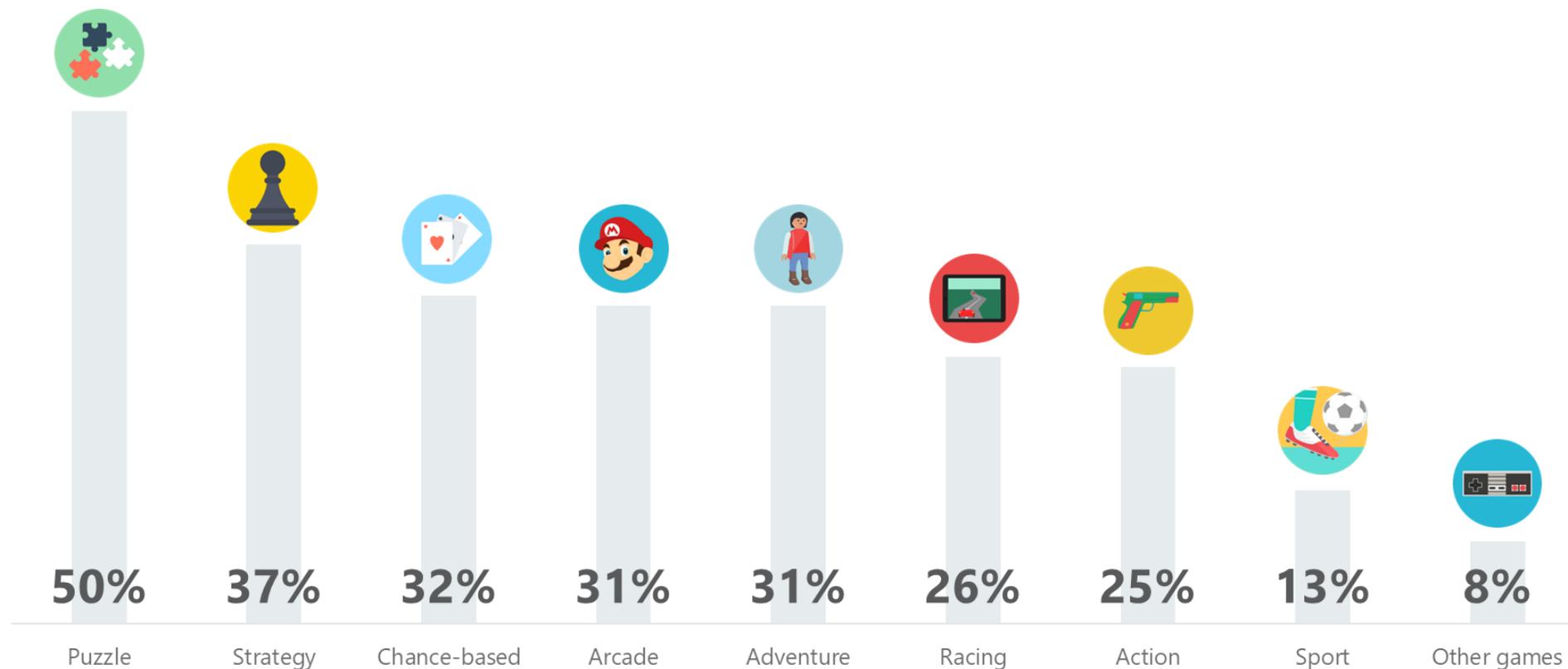
(*) Q: What genres of online games have you played for the past 4 weeks?

Game types played by Moms



(* Q: What genres of online games have you played for the past 4 weeks?

Game types played by Moms with Kids under 10 years old



(*) Q: What genres of online games have you played for the past 4 weeks?

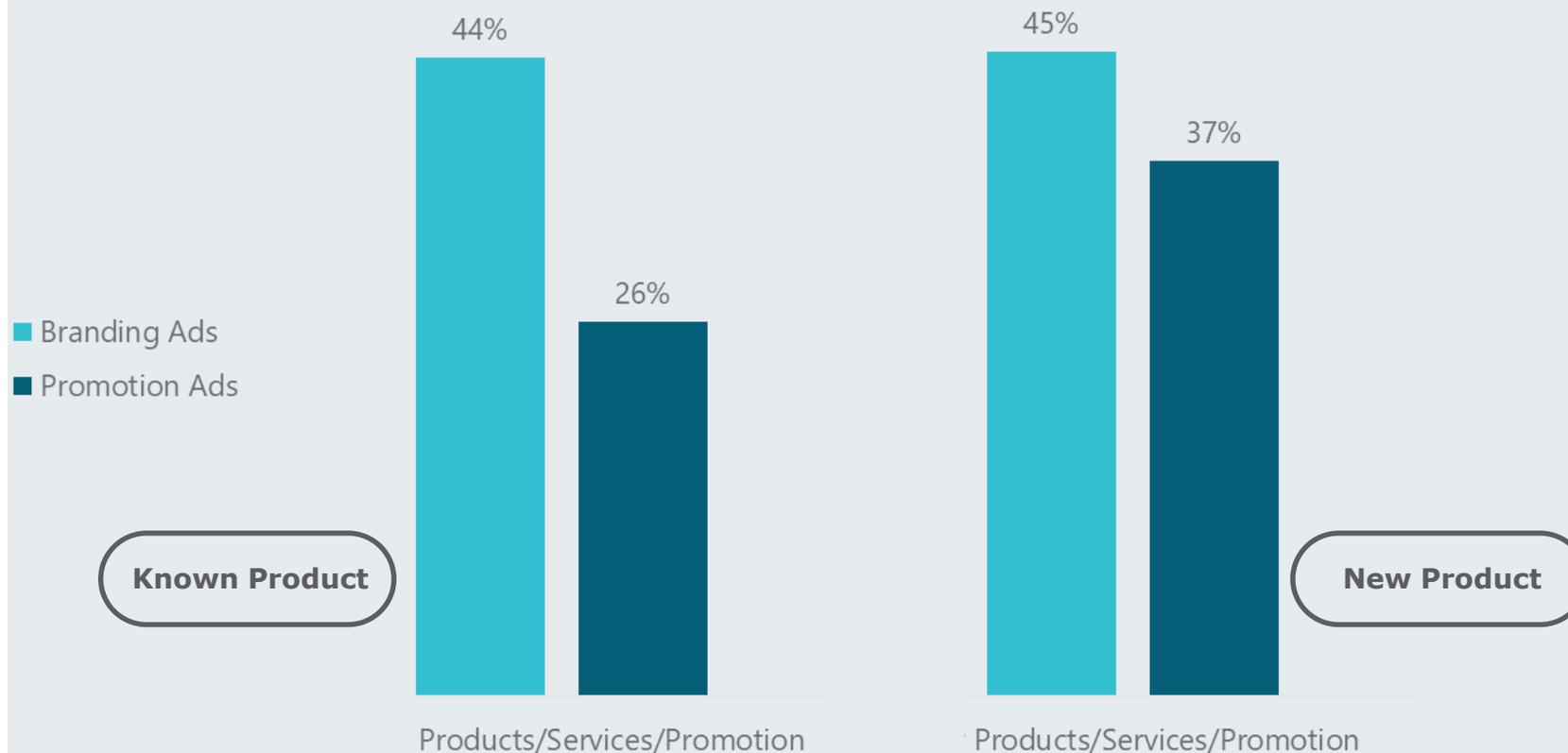
The background of the slide is a dark, marbled texture. In the upper left, a person's hands are shown holding a smartphone with a thumbs-up icon on the screen. In the lower right, another person's hands are shown holding a smartphone with a refresh icon on the screen.

Advertiser question #4

WHAT TYPE OF AD AND AD CONTENT
SHOULD I SERVE TO GAMERS?



Acceptance of ad content



Acceptance of ad content

Overall, acceptance of ads in gamers varies between Brand and Promotion ads. However, brand ads are preferable to promotion ads.

(*) Q: Which of the following ads information that you are comfortable watching/seeing when you're playing mobile games?

n = 789

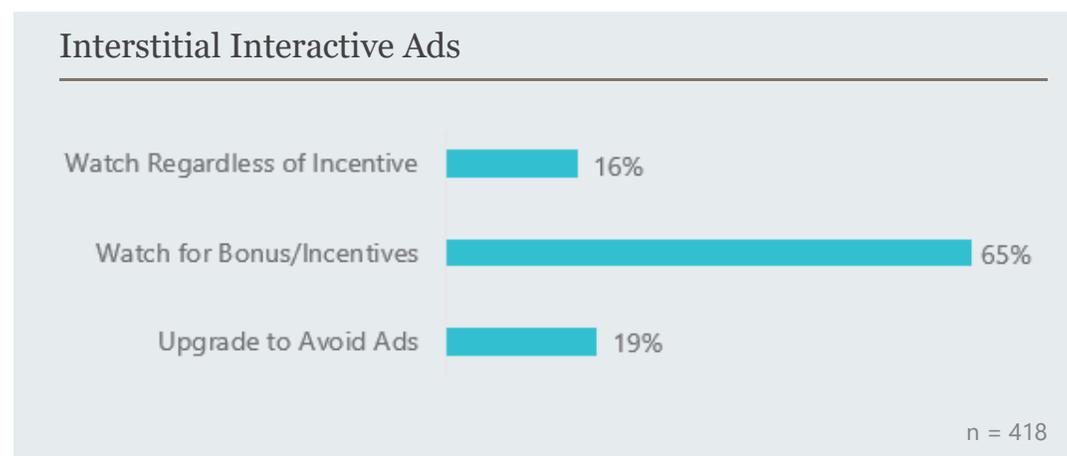
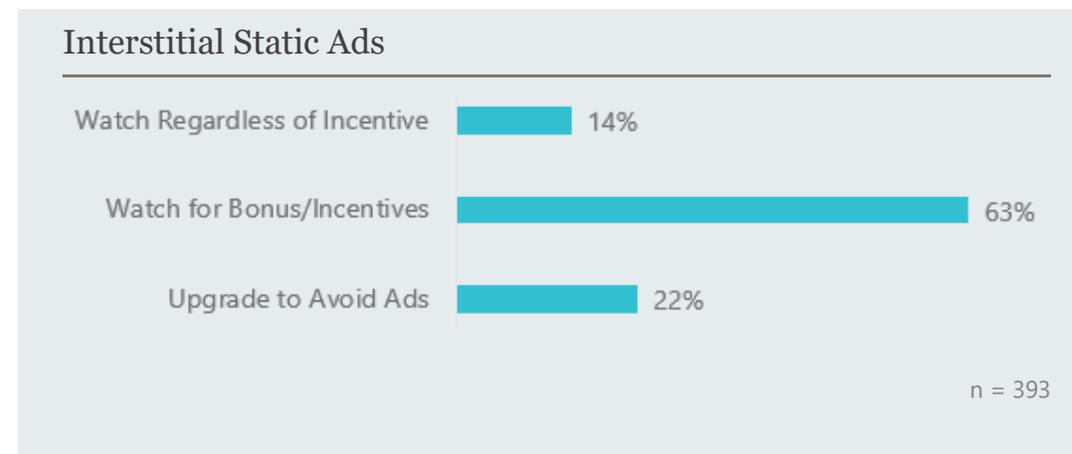
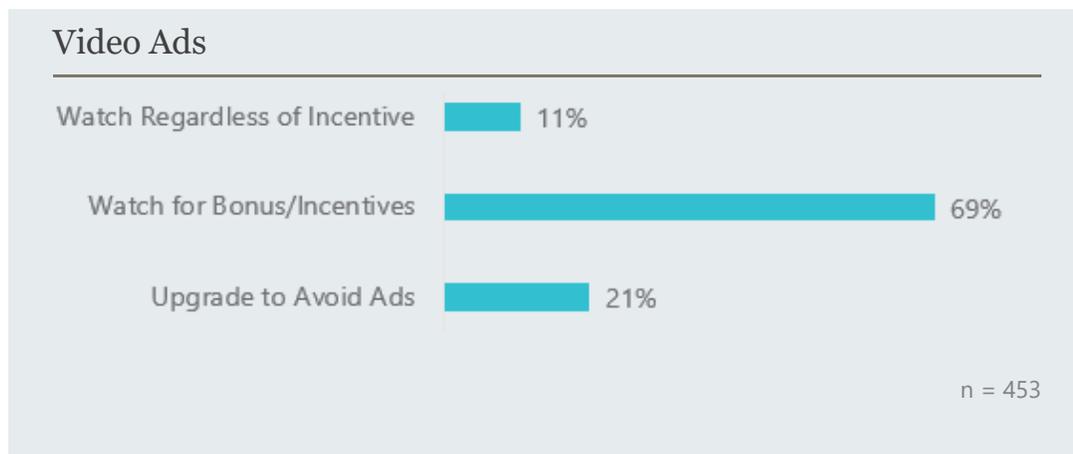
Advertiser question #5

WHAT CAN I DO TO ENGAGE GAMERS
WITH MY ADS?



Gamers reactions to in-game ads

Since few gamers are willing to upgrade to avoid ads but the bonus or incentive is a good trigger to keep them engage with the ads. (**)



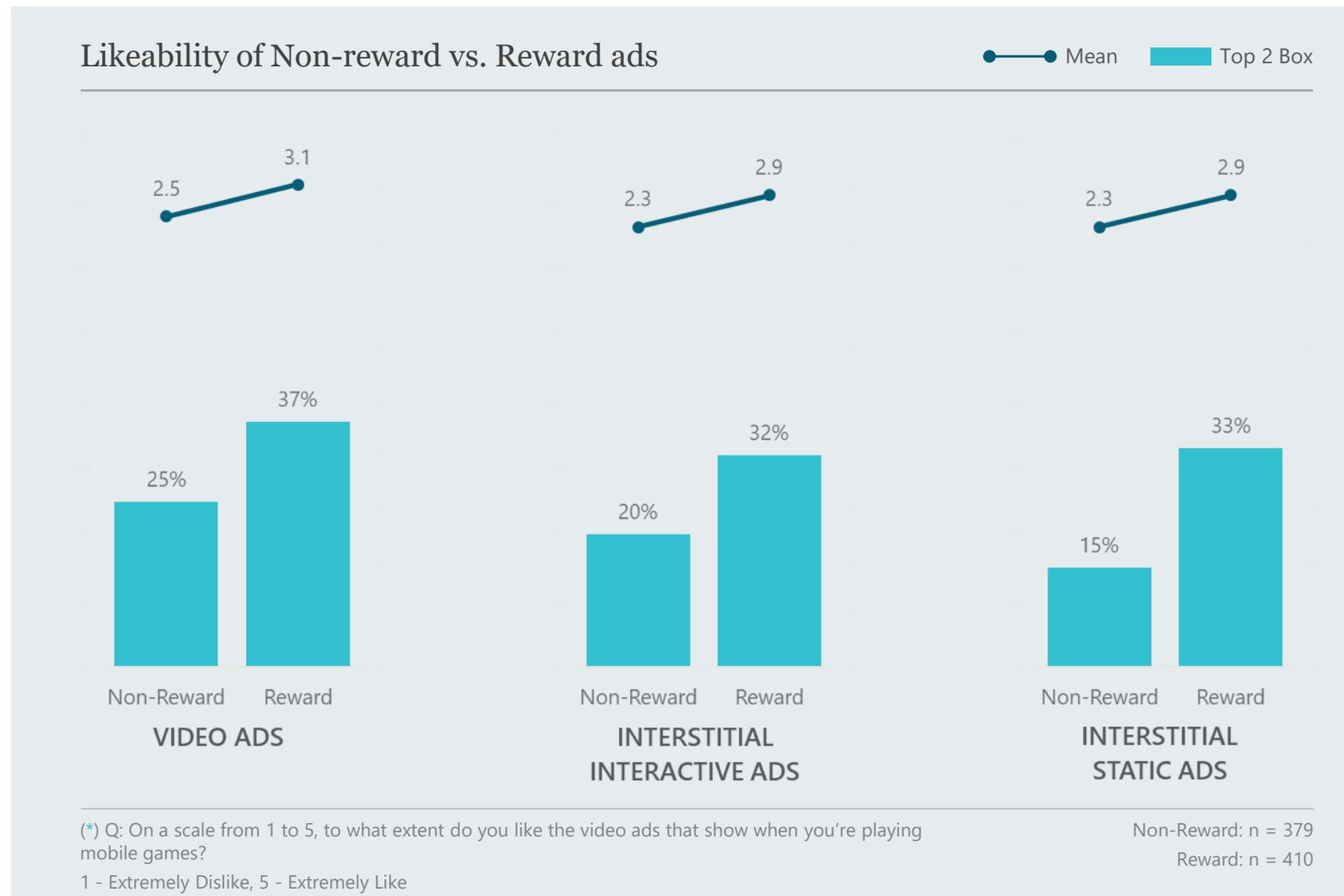
(*) Q: Which of the following action would you most likely to do when you see an ad while playing mobile games?

(**) Exclude people who chose to close/skip ads



The role of reward ads

The effect of rewards in exchange of seeing an ad is certain. Given the rewards, gamers' likeability towards ads improves significantly.



The role of rewards for video ads

For Video Ads in particular, rewards can not only improve the likeability toward the ads but also prolong the acceptance length of the video by 4 seconds.

	LIKEABILITY MEAN SCORE	LIKEABILITY TOP 2 BOX	AVERAGE TOLERATED LENGTH (SECONDS)
NON REWARDED VIDEO ADS n = 379	2.5***	25%***	14***
REWARDED VIDEO ADS n = 410	3.1	37%	18

*** Significantly lower than the rewarded video ads at 99% confidence interval

(*) Q: On a scale from 1 to 5, to what extent do you like the video ads that show when you're playing mobile games?

1 - Extremely Dislike, 5 - Extremely Like

Country summary

WHO CAN I REACH IF I SERVE MY AD INSIDE THE GAME APPS?

- Females and Males up to the age of 44 years old, especially younger Males

HOW MUCH FACETIME CAN I HAVE WITH THOSE GAMERS?

- An average of 53 minutes per sessions, 56 minutes with Males and 50 minutes with Females
- Several times per day

WHERE AND WHEN CAN I CATCH THOSE GAMERS?

- At home and at night, between 7PM-10PM
- In Puzzle, Strategy and Adventure games

WHAT TYPE OF AD AND AD CONTENT SHOULD I SERVE TO GAMERS?

- Ads that introduce a new promotion

WHAT CAN I DO TO ENGAGE GAMERS WITH MY ADS?

- Offer rewards for watching ads, especially Video Ads

Fast track to...



Vietnam



Indonesia



Philippines



Thailand

Thailand

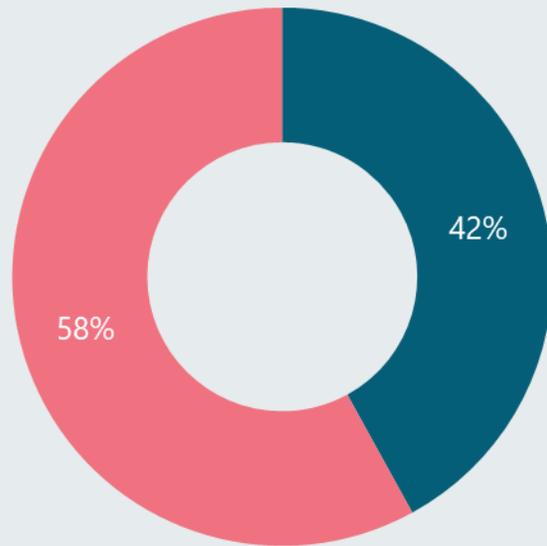


Advertiser question #1

WHO CAN I REACH IF I SERVE MY AD
INSIDE THE GAME APPS?

Gamer demographic

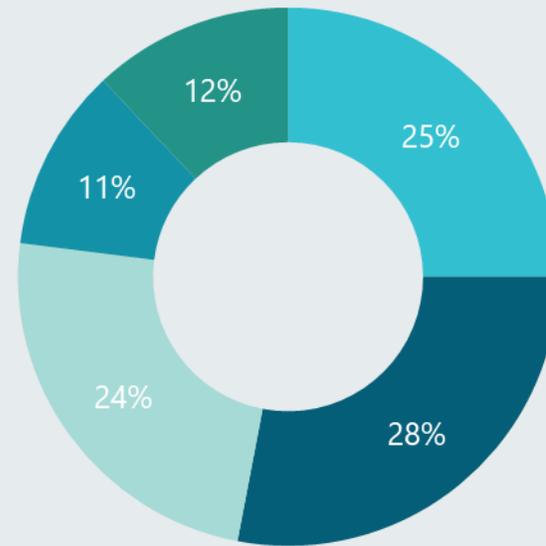
Gamers by gender



■ Males ■ Females

n = 935

Gamers by age groups



■ 16-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55+

n = 935

Mobile games penetration

GENDER



59% Males are Gamers



76% Females are Gamers

AGE GROUPS



75% People 16-24 Y/O are Gamers



80% People 25-34 Y/O are Gamers



73% People 35-44 Y/O are Gamers

49% People 45-54 Y/O are Gamers

47% People 55+ Y/O are Gamers

TARGET GROUPS IN HIGH DEMAND FOR ADVERTISERS



72% Males 18-35 Years Old are Gamers



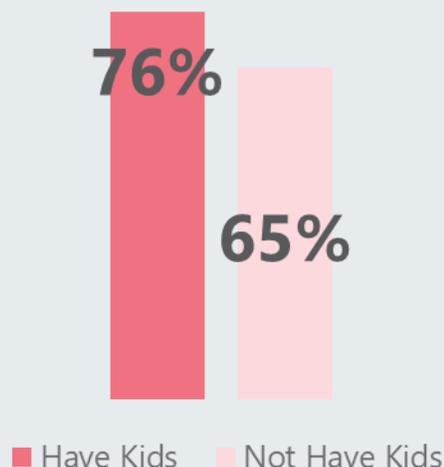
80% Females 18-35 Years Old are Gamers



76% Moms are Gamers

Moms with young Kids' profiles

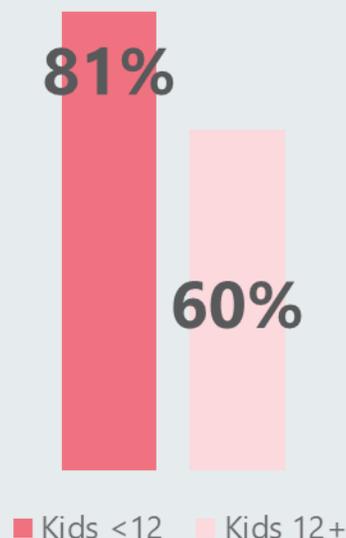
Penetration amongst Females with kids vs. no kids



(*) Q: Do you have any kid?

Moms: n = 164
Non-Moms: n = 769

Penetration amongst Moms with kids < 12 vs. older kids



Moms with Kids <12 Years Old: n = 133
Moms with Kids 12+ Years Old: n = 31

In general, Females with Kids (of all ages) have a higher penetration to mobile games than Females without Kids.

Particularly, Moms with Kids younger than 10 years old can be more likely to be gamers than Moms with Kids of older age.

Moms as mobile gamers

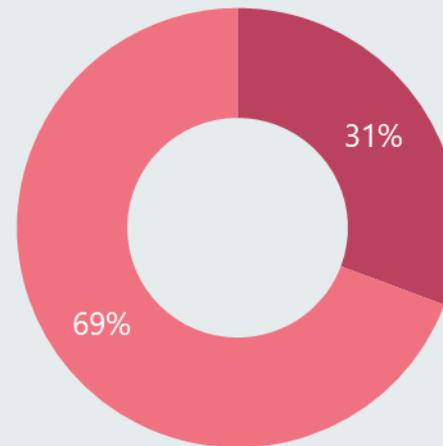
Penetration



76%
of Moms are
gamers

n = 218

Percentage of Moms in Females



■ Moms ■ Females

n = 539

Moms with Kids age under 10 years old as mobile gamers

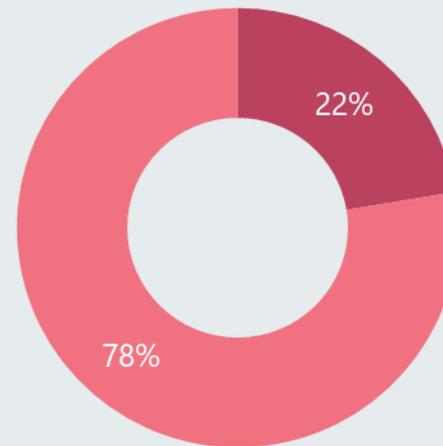
Penetration



81%
of Moms with
Kids age under
10 years old are
gamers

n = 149

Percentage of Moms with Kids under 10 years old in Females



■ Moms ■ Females

n = 539

Millennials as mobile gamers

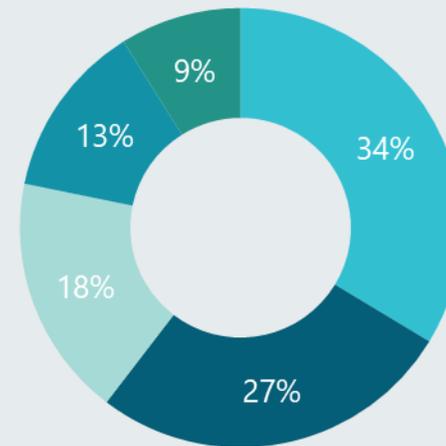
Penetration

80%
of Millennials
are gamers



n = 323

Percentage of Millennials in mobile gamers



■ 16-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55+

n = 935

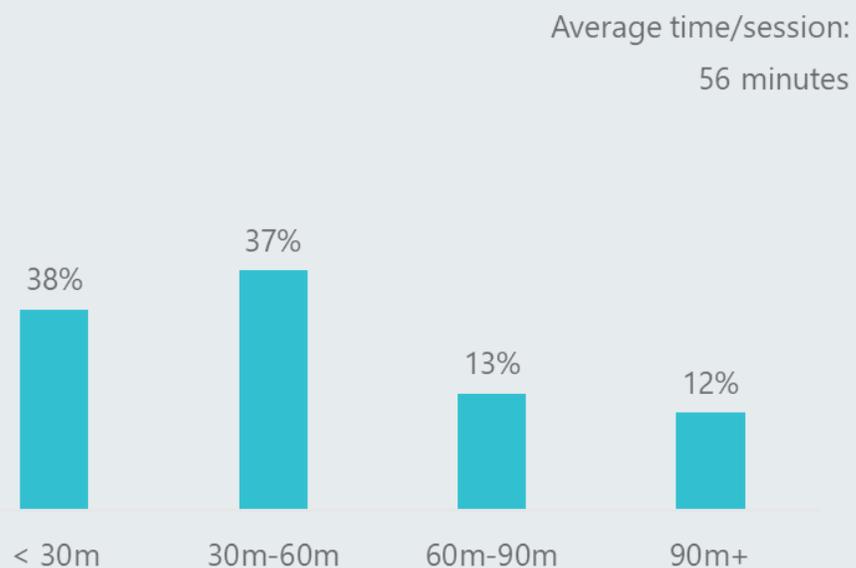
Advertiser question #2

HOW MUCH FACETIME CAN I HAVE WITH THOSE GAMERS?

Session Time - Overall

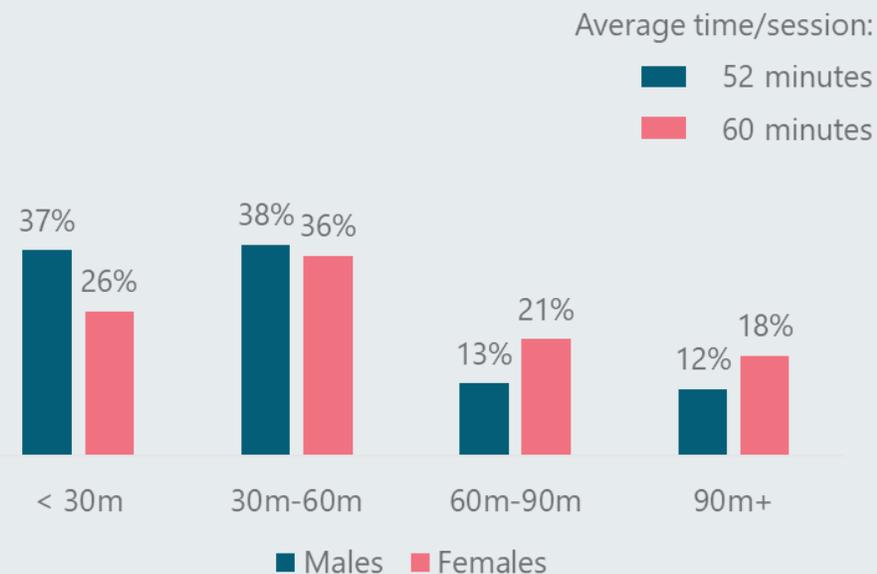
Most of gamers spend 60 minutes or less each time they play mobile games. Advertisers have more time to interact with Females in-game apps as they spend much longer time time in the apps.

Time per each session



(*) Q: On average, how much time do you spend playing on each session? n = 935

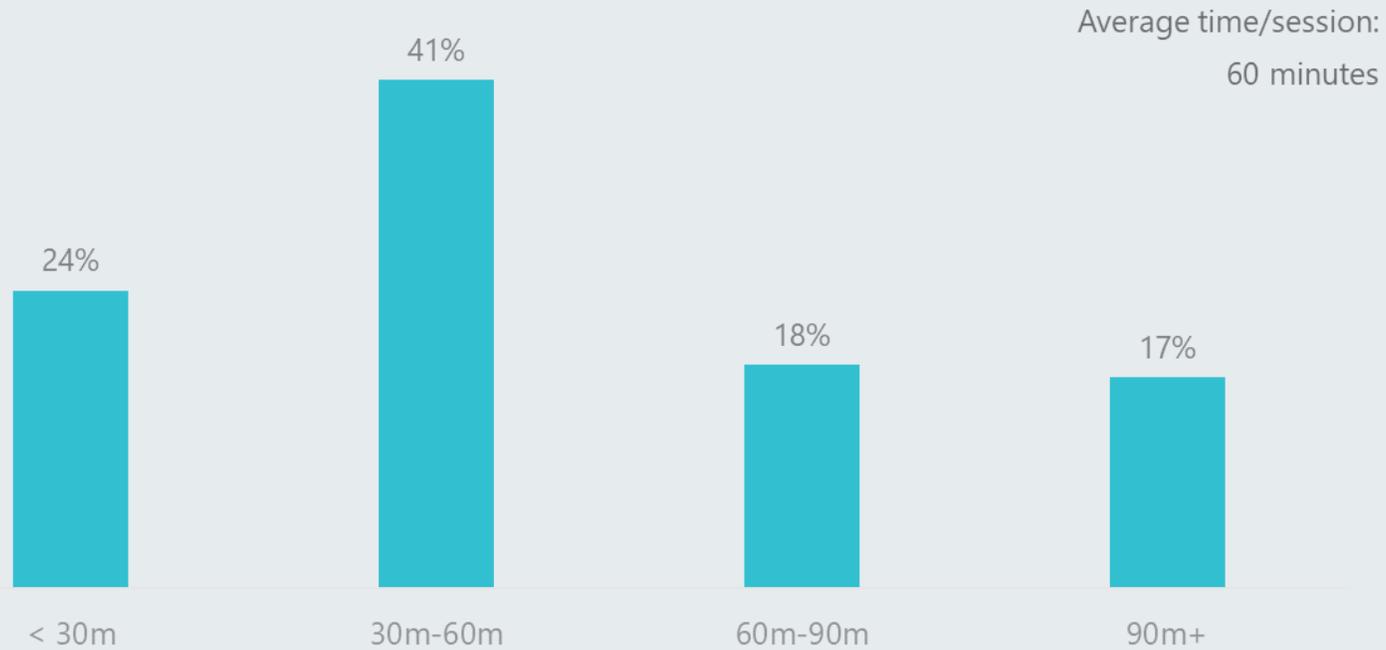
Time per each session by gender



(*) Q: On average, how much time do you spend playing on each session? n = 935

Millennials – Session Time

Time spent each session of Millennials

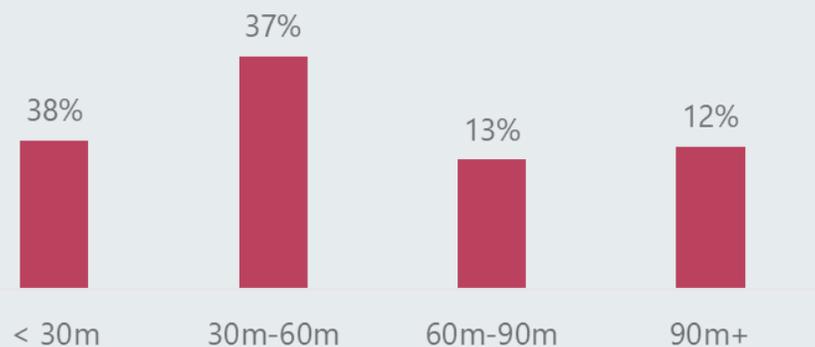


n = 258

Moms – Session Time

Time per each session of all Moms

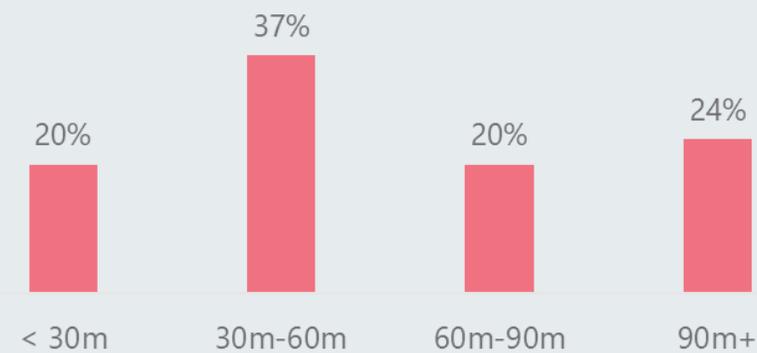
Average time/session:
63 minutes



(*) Q: On average, how much time do you spend playing on each session? n = 165

Time per each session of Moms with Kids under 10 years old

Average time/session:
66 minutes

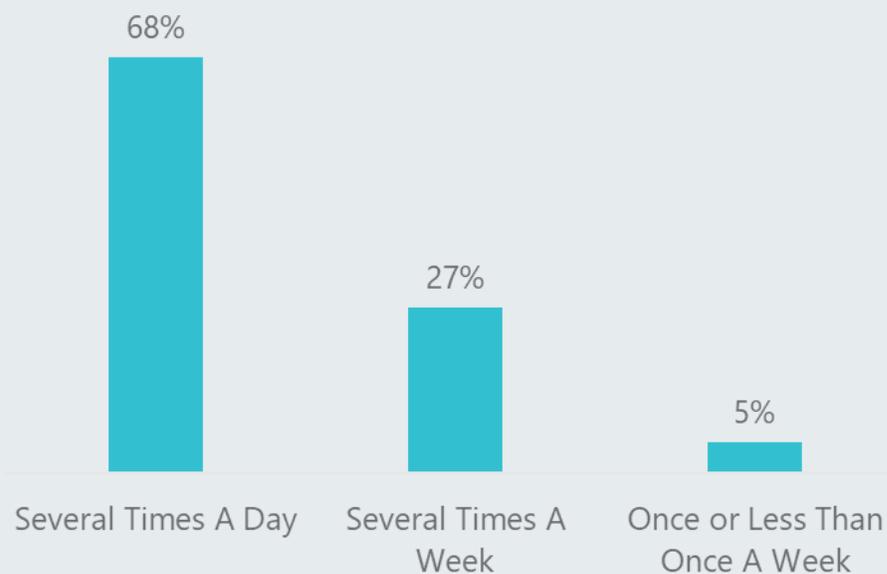


(*) Q: On average, how much time do you spend playing on each session? n = 121

Frequency of playing

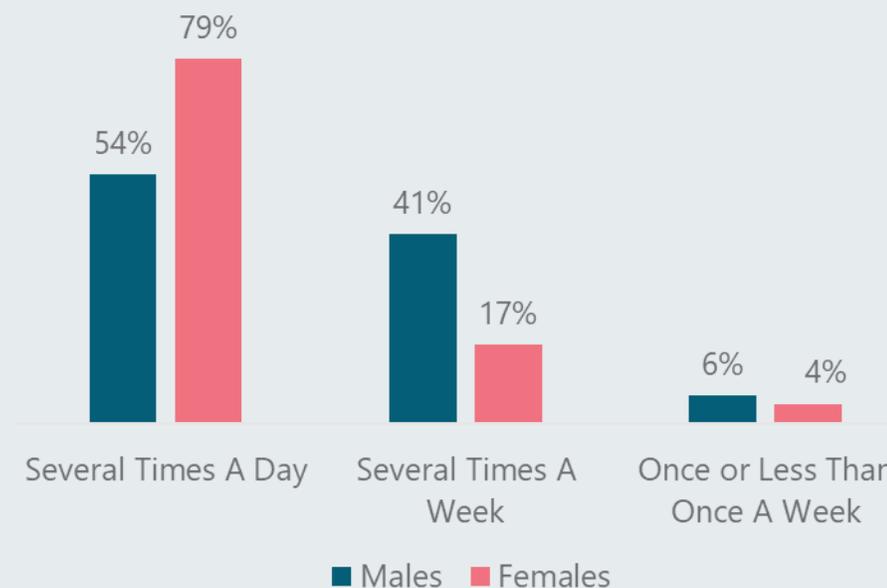
Mobile Gaming occurs several times a day for both genders. The frequency of playing daily is higher amongst Females than Males. That means if advertising in mobile game apps can reach Females, it can do so several times of the day.

Play frequency



(*) Q: How frequently do you play games using apps on your mobile/tablets? n = 935

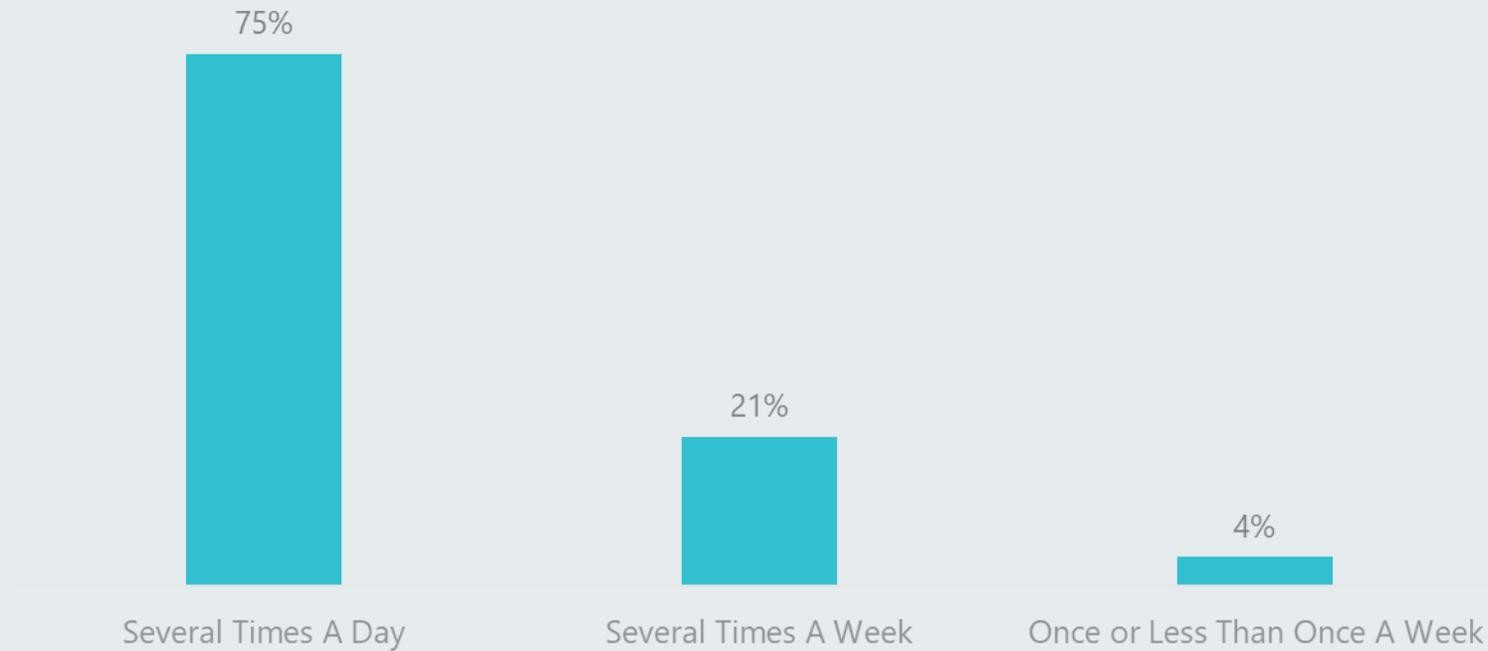
Play frequency by gender



(*) Q: How frequently do you play games using apps on your mobile/tablets? n = 935

Frequency of playing of Millennials

Play frequency of Millennials

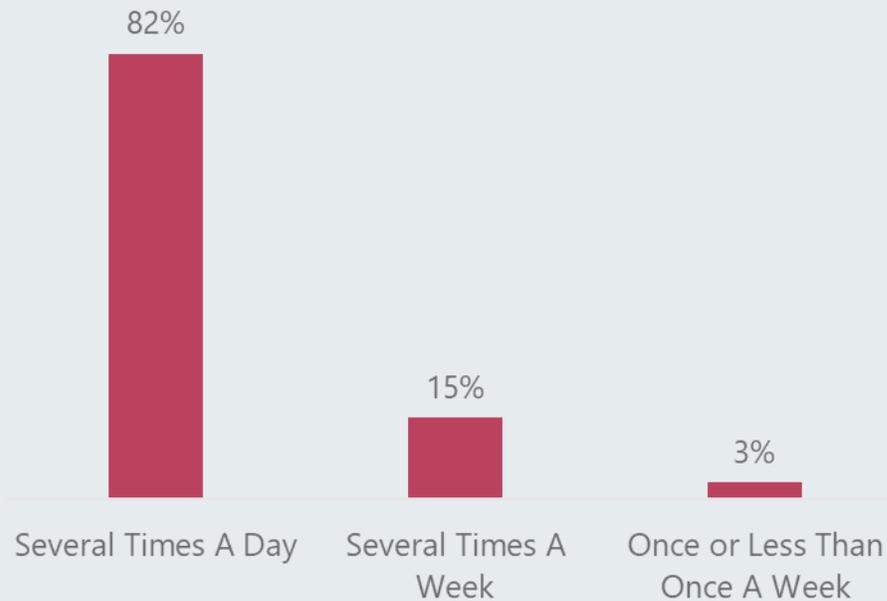


n - 258

Frequency of playing of Moms

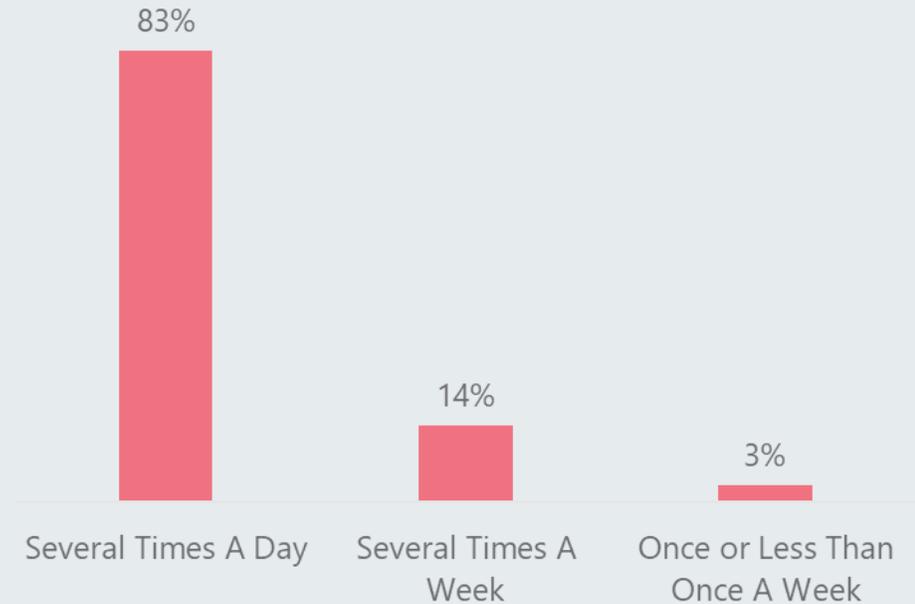


Play frequency of all Moms



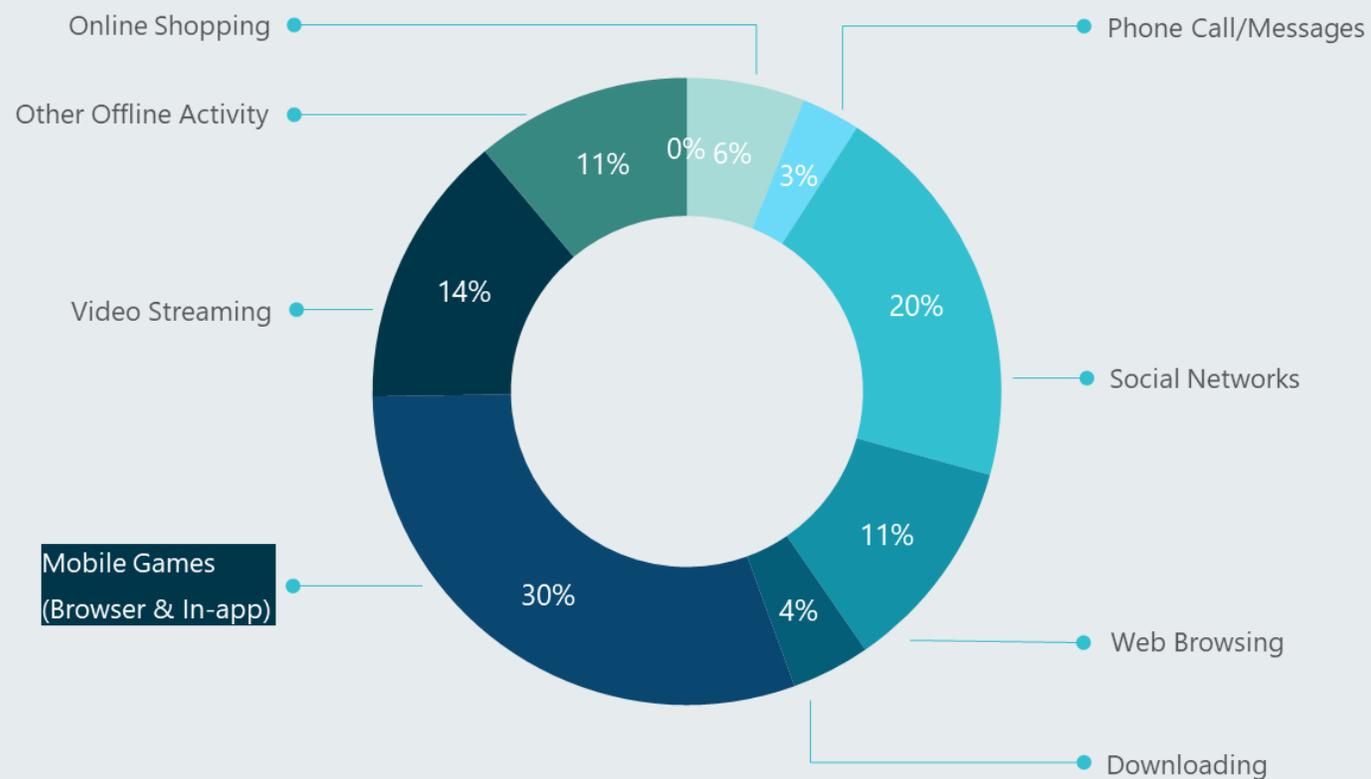
(*) Q: How frequently do you play games using apps on your mobile/tablets? n = 165

Play frequency of Moms with Kids under 10 years old



(*) Q: How frequently do you play games using apps on your mobile/tablets? n = 121

Share of time on mobile



Share of time on mobile

At 30%, time spent on gaming is significantly higher than any other activity by the user on his/her device.

(*) Q: Thinking about the last 24 hours, how much time do you spend on your mobile for the following activities?

n = 935

Advertiser question #3

WHERE AND WHEN CAN I CATCH THOSE GAMERS?



Location and time of playing

Gamers mostly play games at home and in the evening. Morning from 6AM-10AM and midnight from 11PM-5AM are also good periods to catch them.

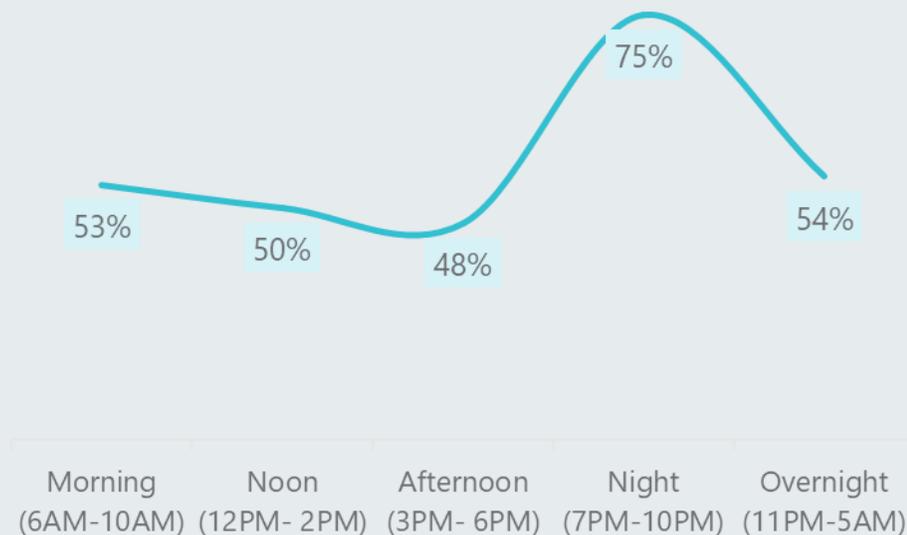
Location to play mobile games



(*) Q: Where are you when you open the game apps and play?

n = 935

Time of playing



(*) Q: At what time of the day do you play games in-app on mobile?

n = 935

Location and time of playing of Males

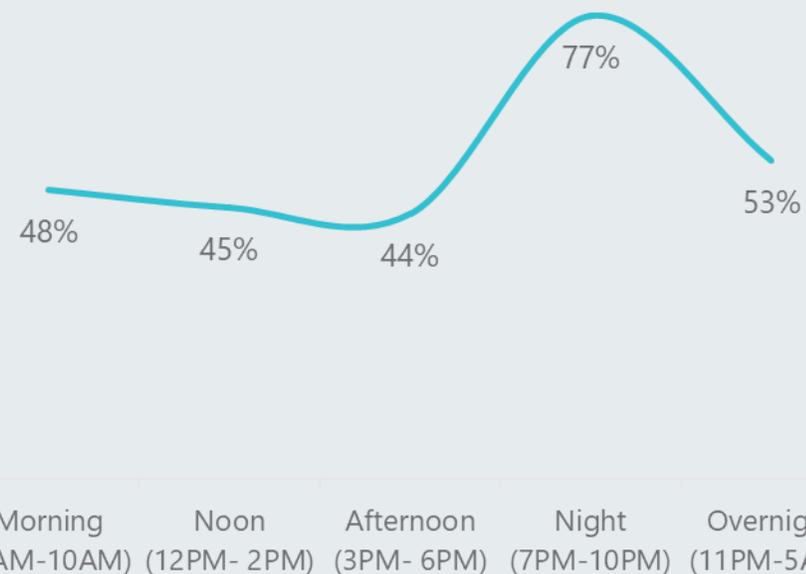
Location to play mobile games



(*) Q: Where are you when you open the game apps and play?

n = 396

Time of playing

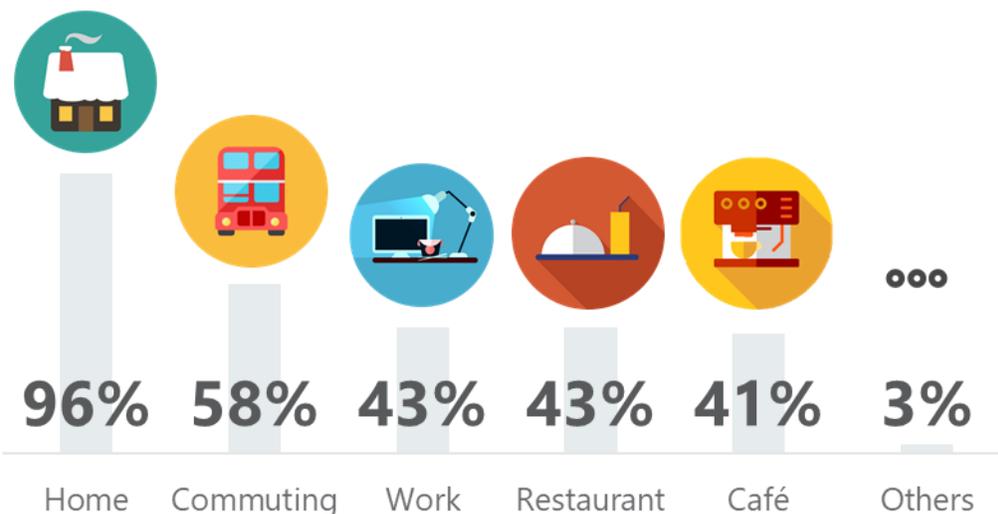


(*) Q: At what time of the day do you play games in-app on mobile?

n = 396

Location and time of playing of Females

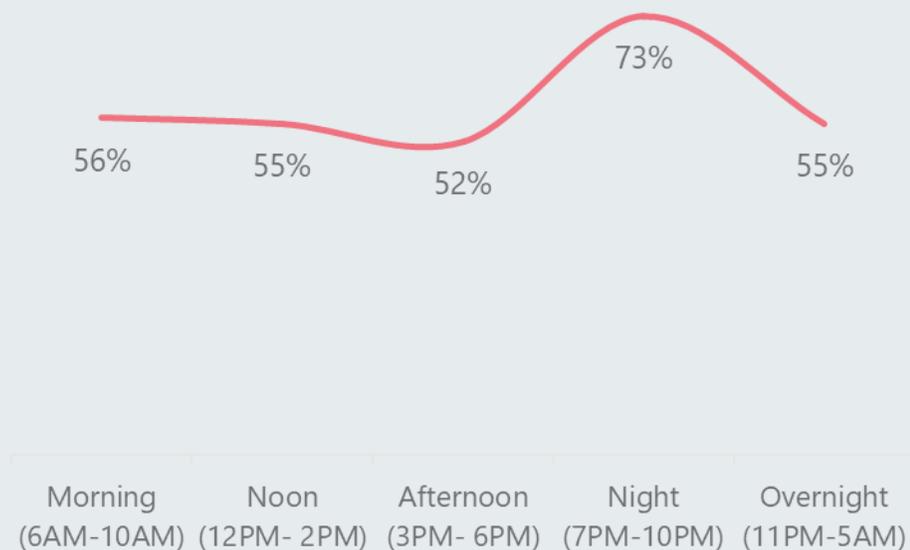
Location to play mobile games



(*) Q: Where are you when you open the game apps and play?

n = 539

Time of playing

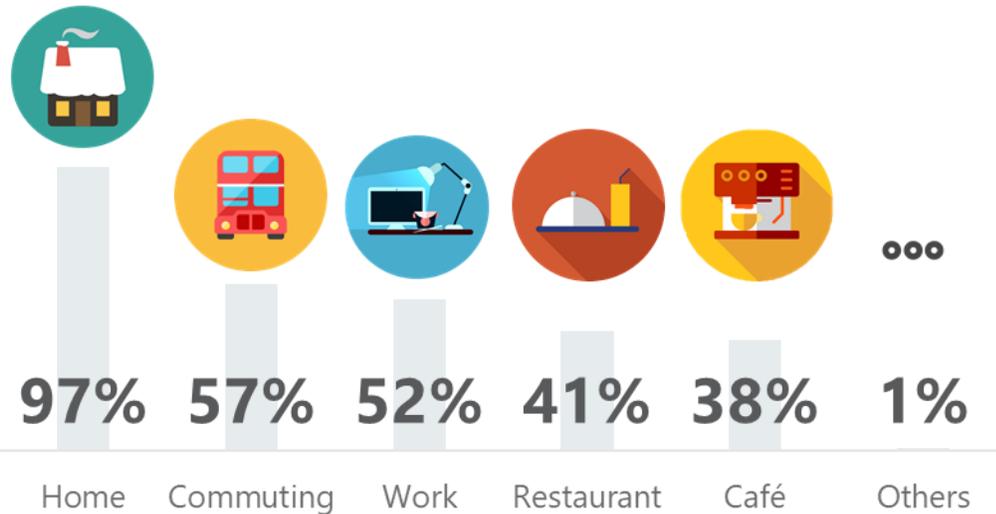


(*) Q: At what time of the day do you play games in-app on mobile?

n = 539

Location and time of playing of Millennials

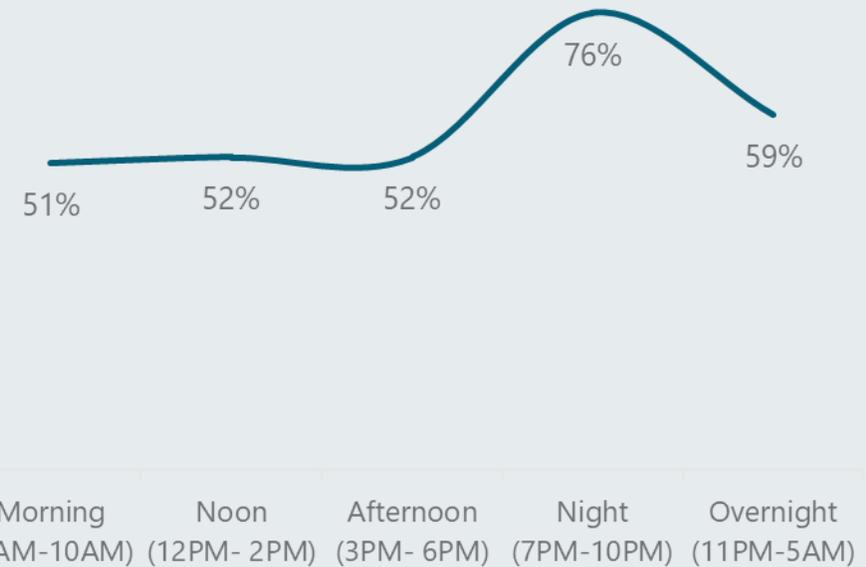
Location to play mobile games



(*) Q: Where are you when you open the game apps and play?

n = 258

Time of playing

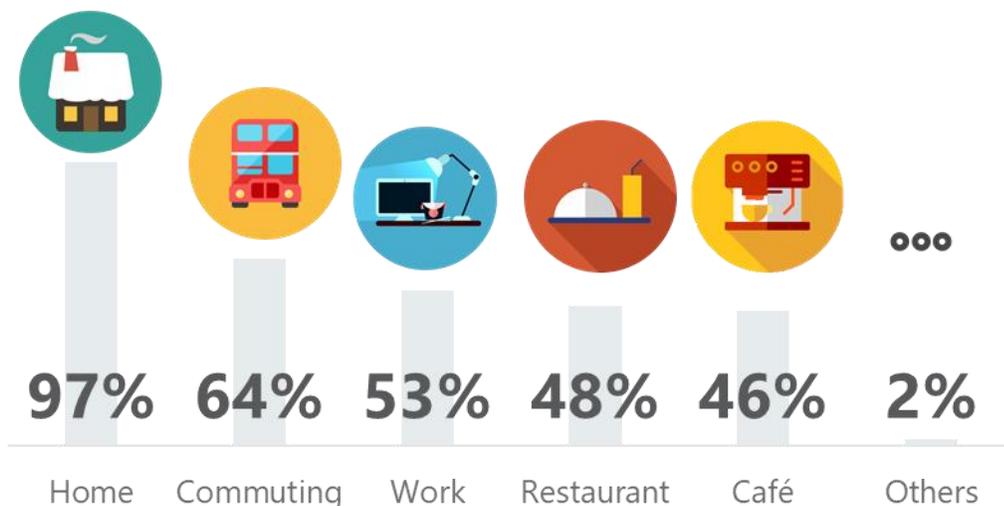


(*) Q: At what time of the day do you play games in-app on mobile?

n = 258

Location and time of playing of Moms

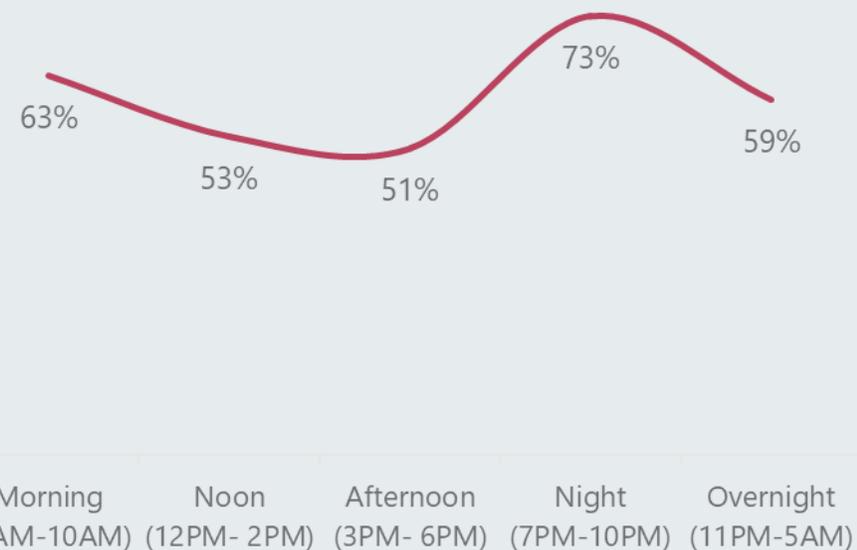
Location to play mobile games



(*) Q: Where are you when you open the game apps and play?

n = 165

Time of playing

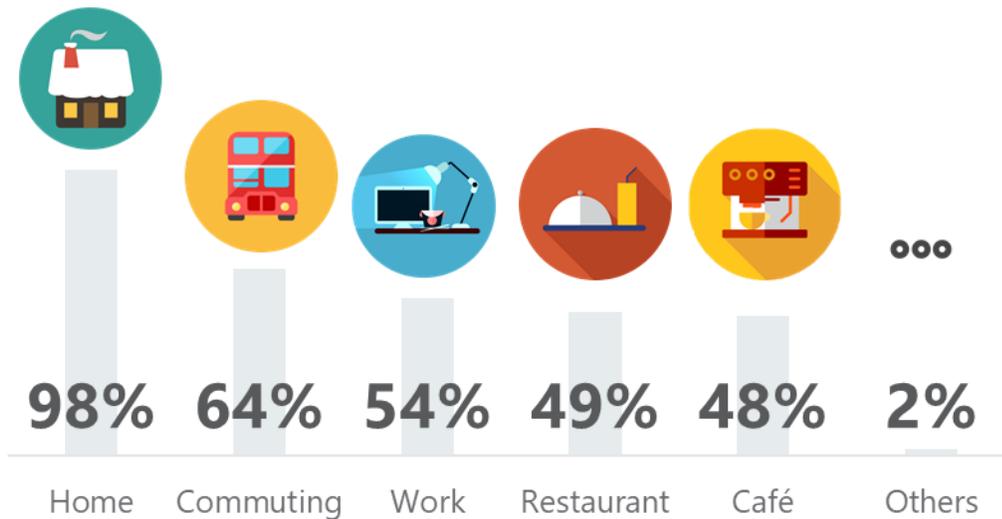


(*) Q: At what time of the day do you play games in-app on mobile?

n = 165

Location and time of playing of Moms with Kids under 10 years old

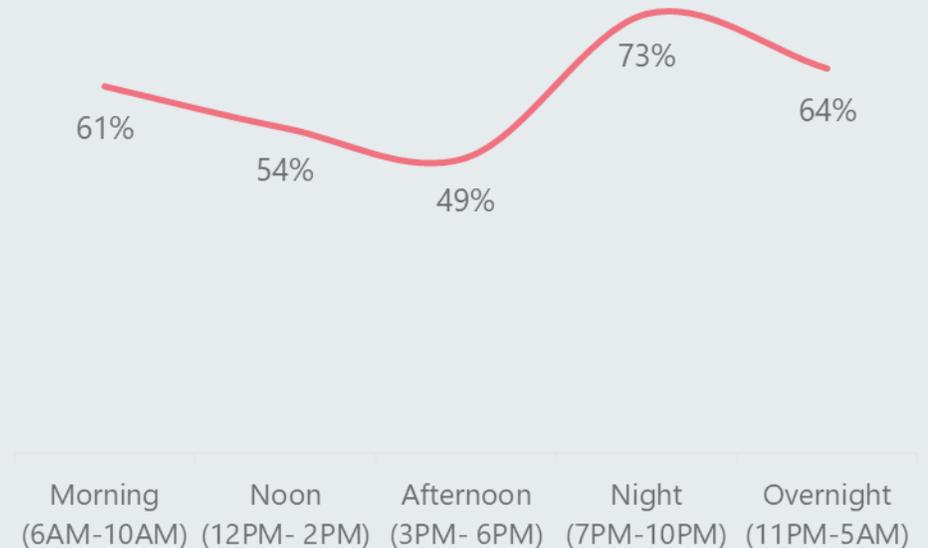
Location to play mobile games



(*) Q: Where are you when you open the game apps and play?

n = 121

Time of playing

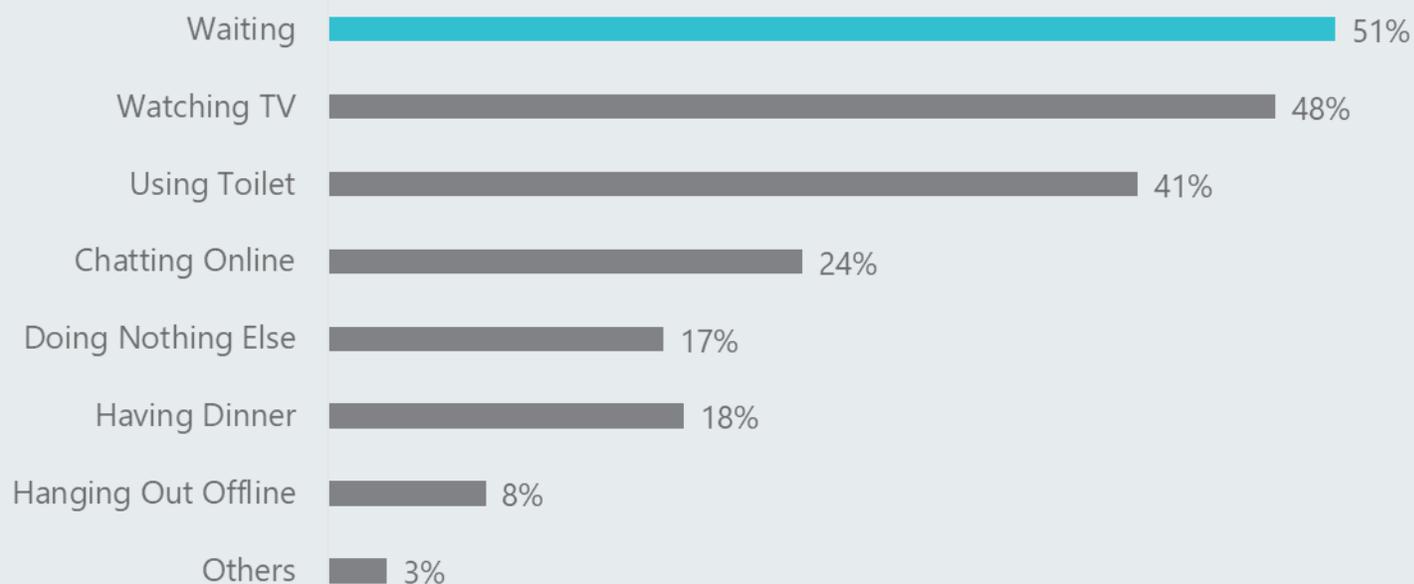


(*) Q: At what time of the day do you play games in-app on mobile?

n = 121

Multi-tasking while playing mobile games at Home

Top 4 activities while playing games at Home



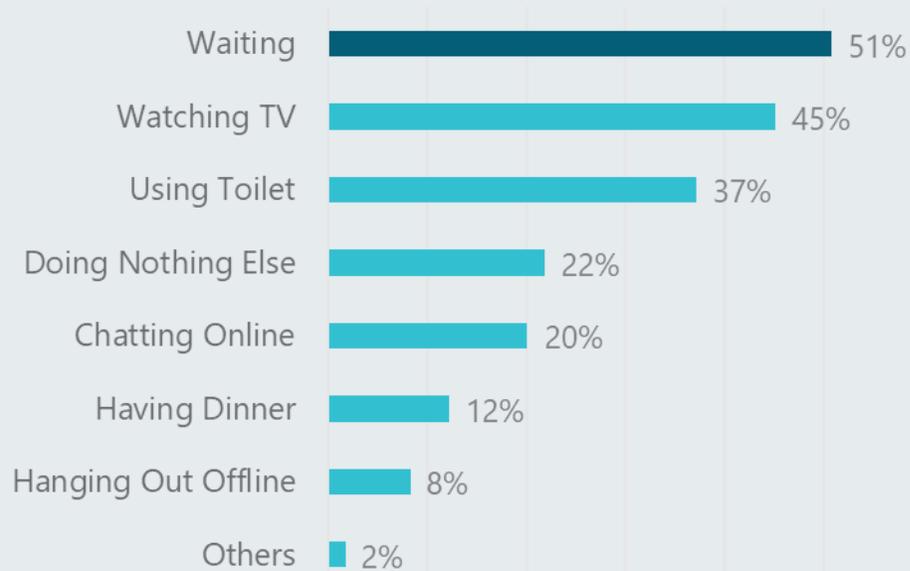
Although there are gamers who absolutely focus on the games and do nothing else, a significant part of them are multi-tasking.

(*) Q: What do you most often do while playing in-app games?

n = 901

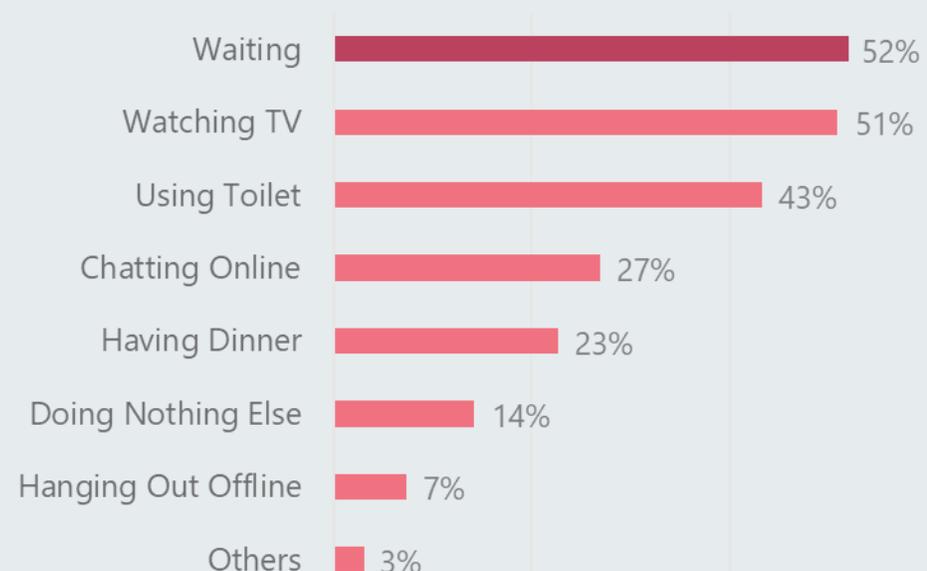
Multi-tasking while playing mobile games at Home by gender

Top 4 activities while playing games at Home for Males



n - 381

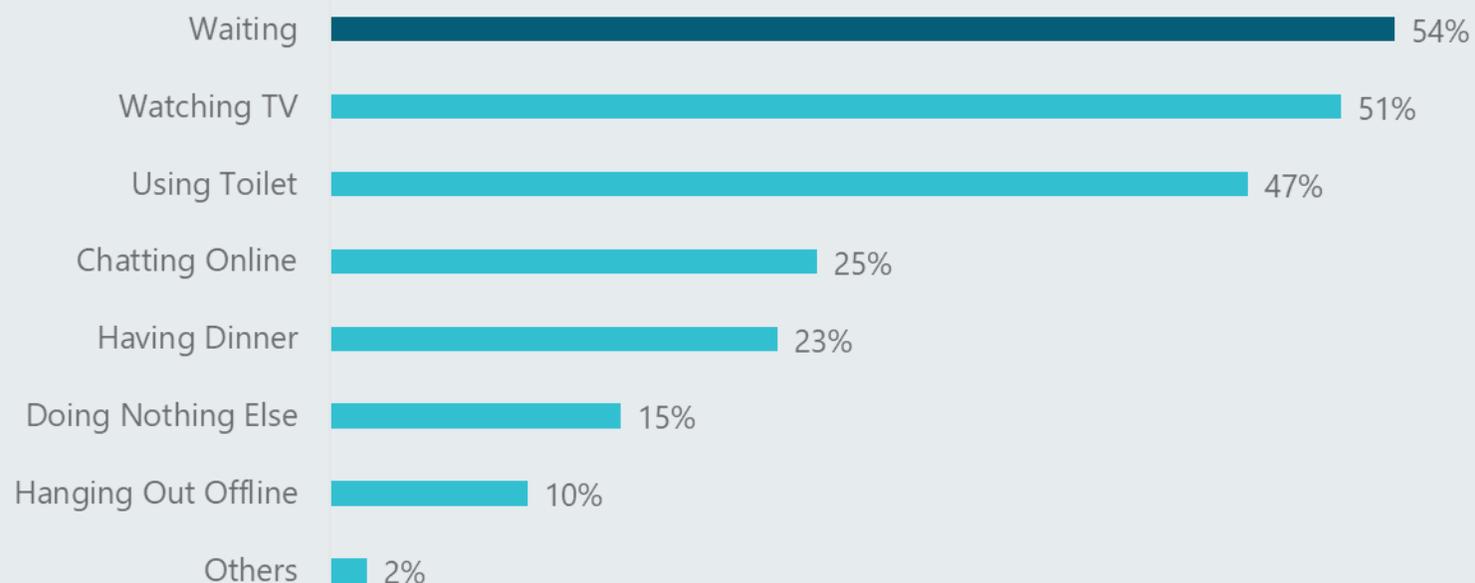
Top 4 activities while playing games at Home for Females



n - 520

Millennials: Multi-tasking while playing mobile games at Home

Top 4 activities while playing games at Home for Millennials

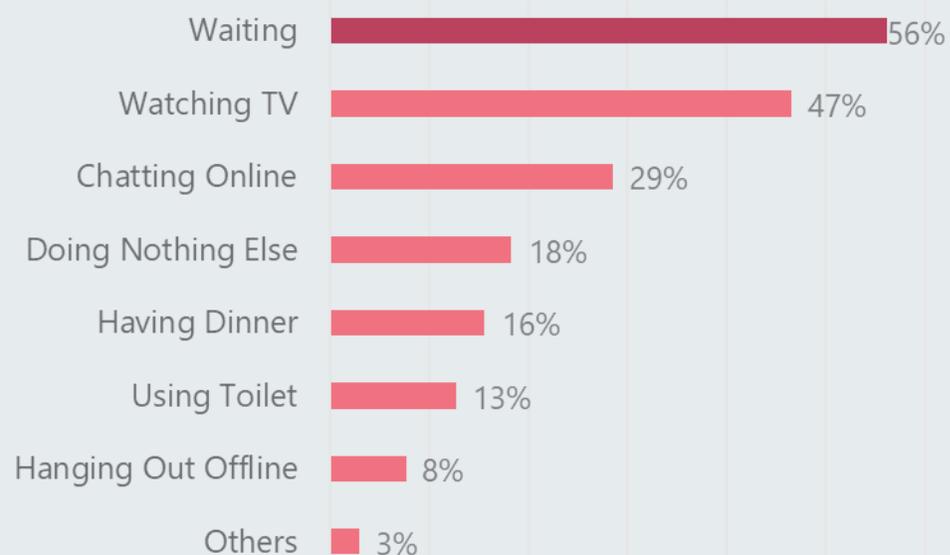


(*) Q: What do you most often do while playing in-app games?

n = 250

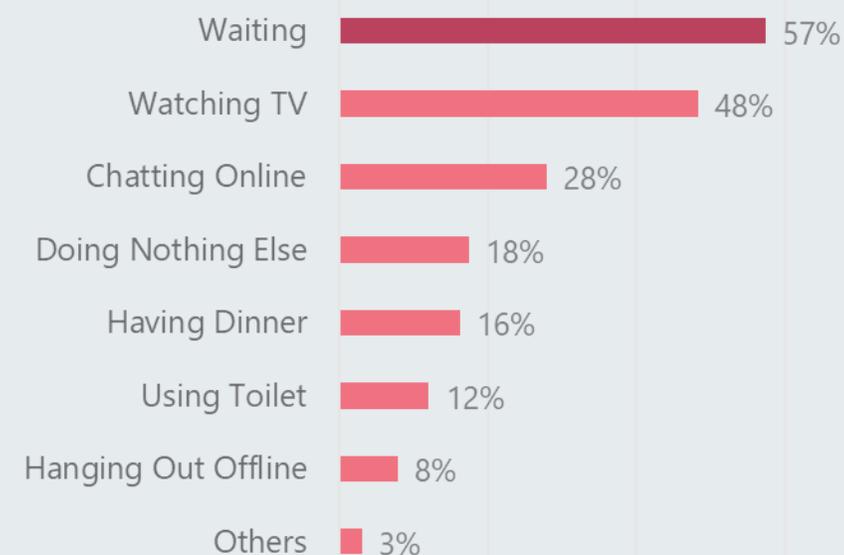
Moms: Multi-tasking while playing mobile games at Home

Top 4 activities while playing games at Home for Moms



n - 190

Top 4 activities while playing games at Home for Moms with Kids younger than 10 years old



n - 161

Device usage

Mobiles remain the most powerful devices where advertisers can reach their audiences in mobile game apps. Meanwhile, even though tablets are more favorable amongst the older group of gamers, it accounts for a very small proportion.

Devices used when playing mobile games



58% Mobile Only



2% Tablet Only



40% Both Devices

Devices used by age groups when playing mobile games



< 35 Years Old



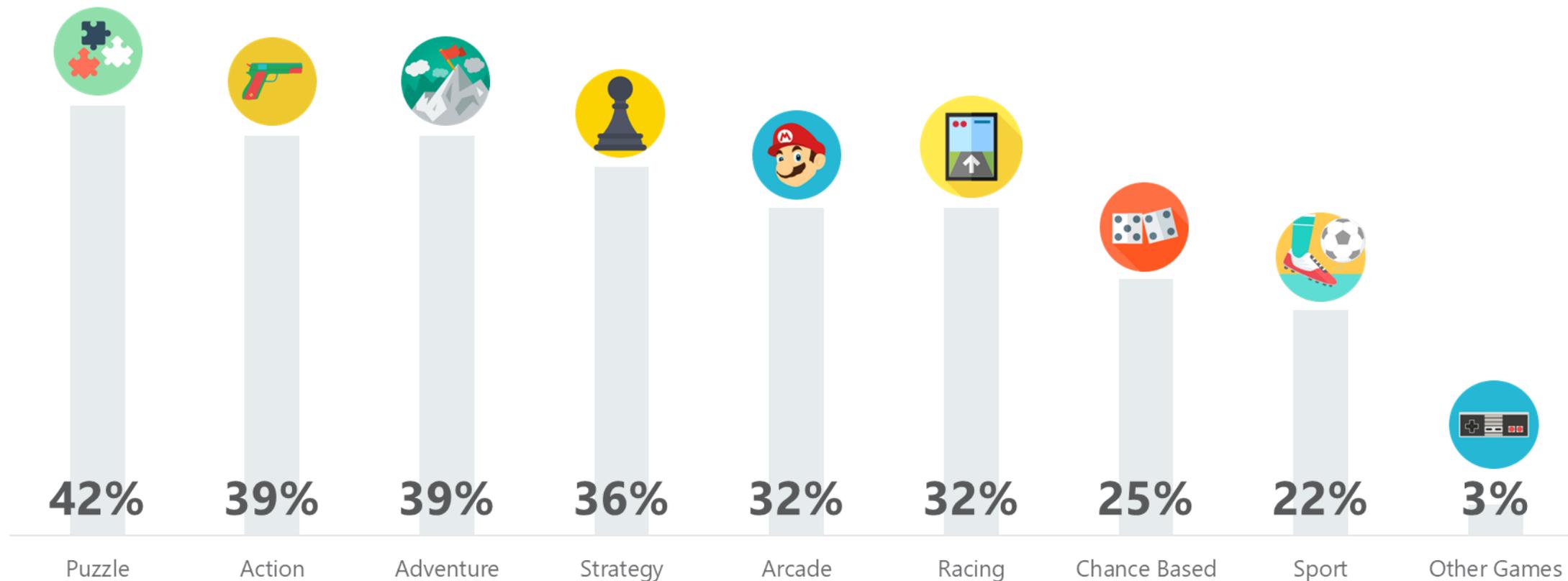
35+ Years Old

Mobile Only	61%	54%
Tablet Only	1%	4%
Both Devices	38%	42%

(*) Q: On which devices do you usually use to play mobile games?

Game types

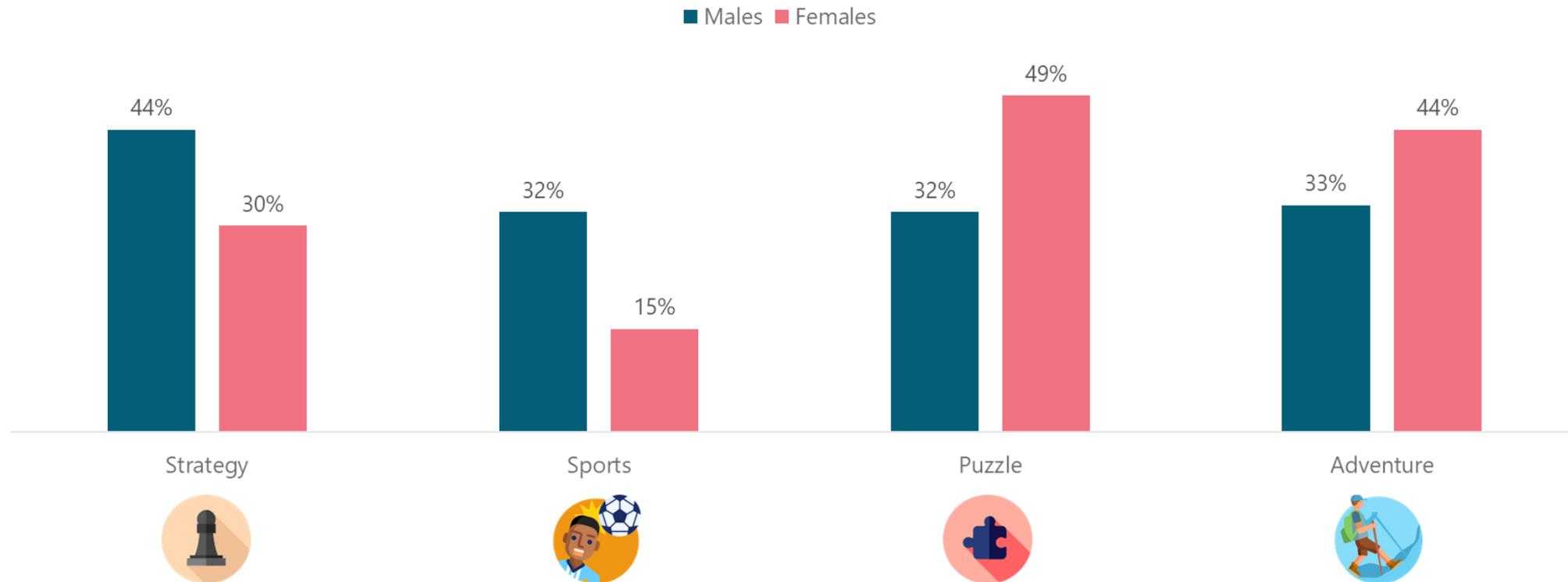
Top 4 game types are Puzzle, Action, Adventure and Strategy accordingly.



(*) Q: What genres of online games have you played for the past 4 weeks?

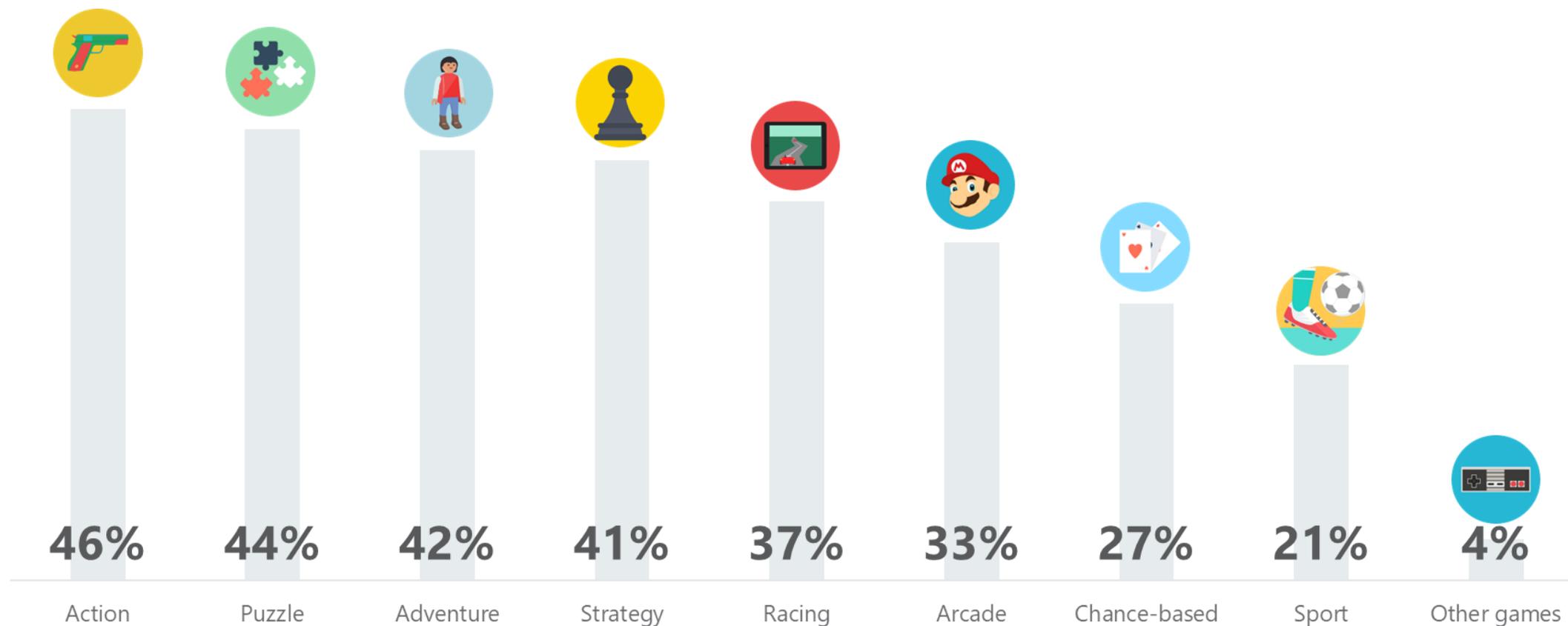
Game types by gender

While Females can largely be reached in Puzzle and Adventure games, Strategy and Sports games are those most Males are playing.



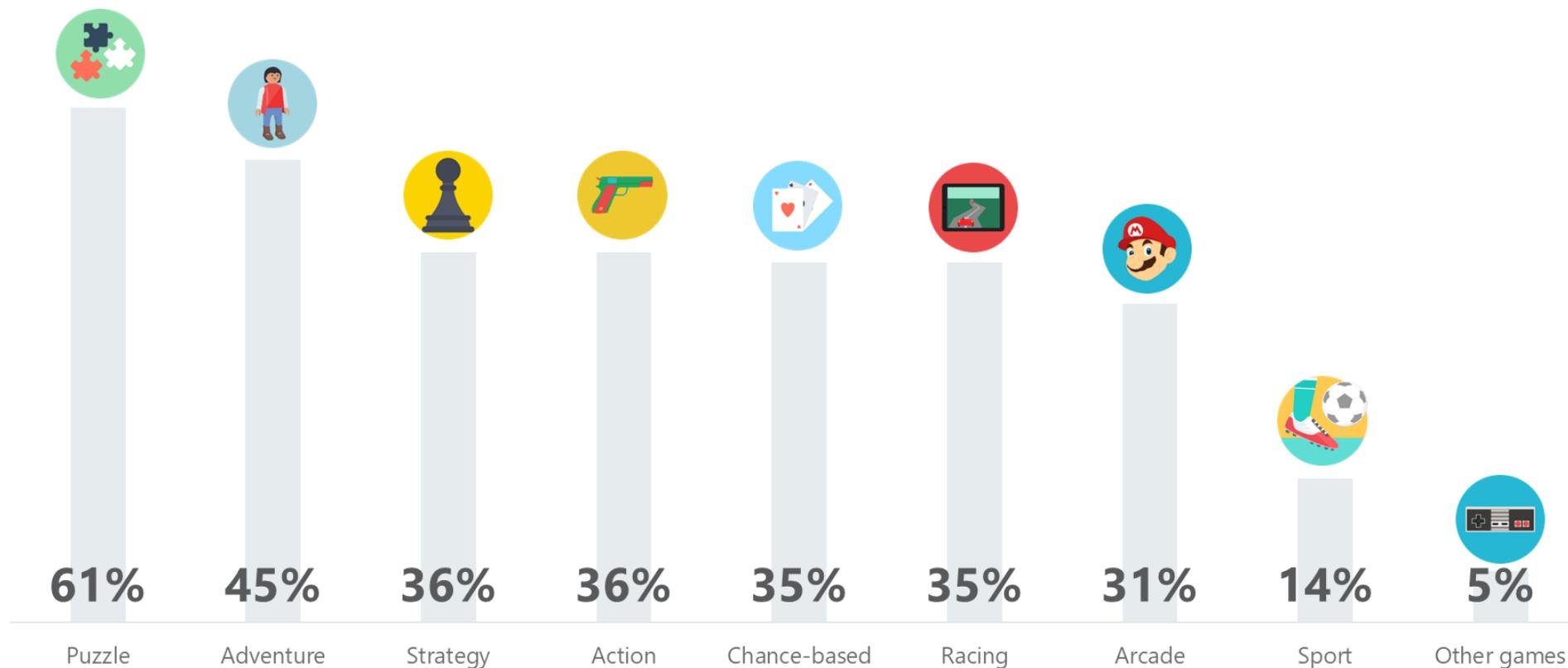
(*) Q: What genres of online games have you played for the past 4 weeks?

Millennials: Game types



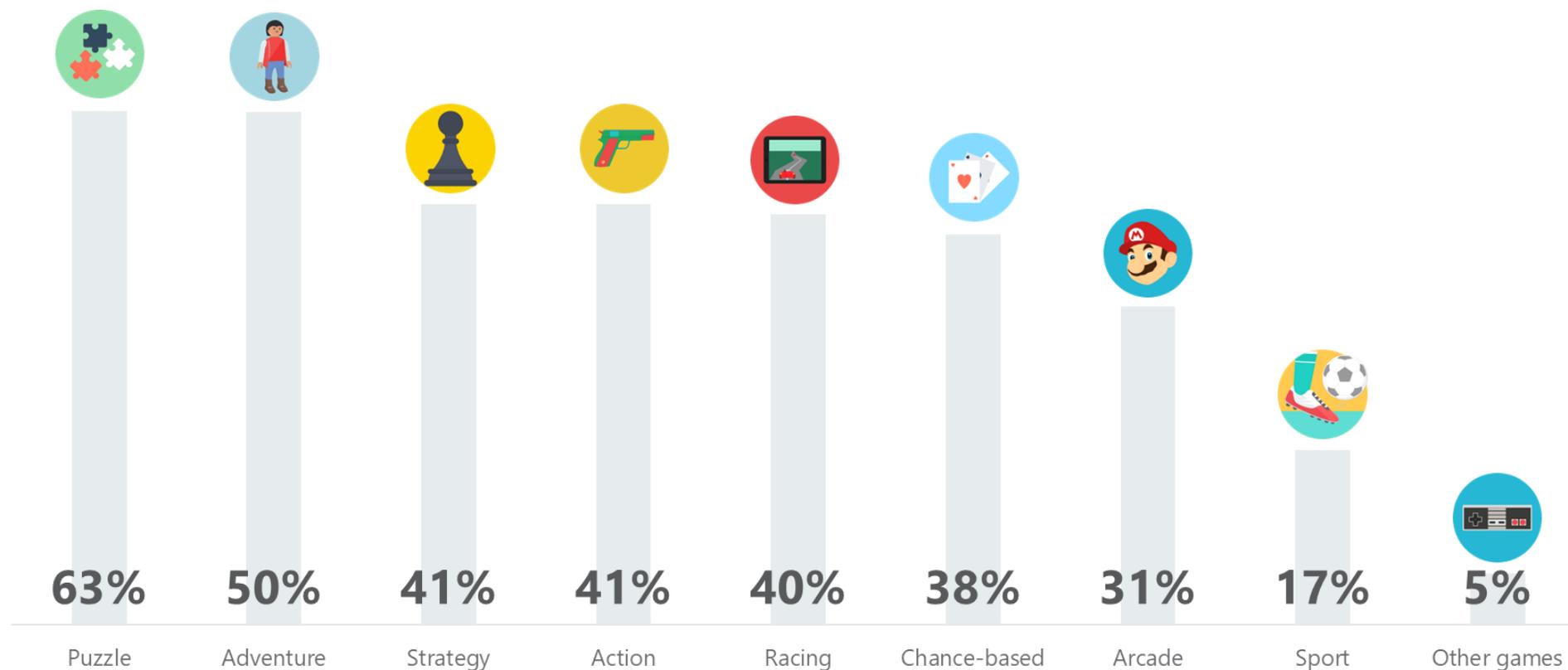
(*) Q: What genres of online games have you played for the past 4 weeks?

Game types played by Moms



(*) Q: What genres of online games have you played for the past 4 weeks?

Game types played by Moms with Kids under 10 years old



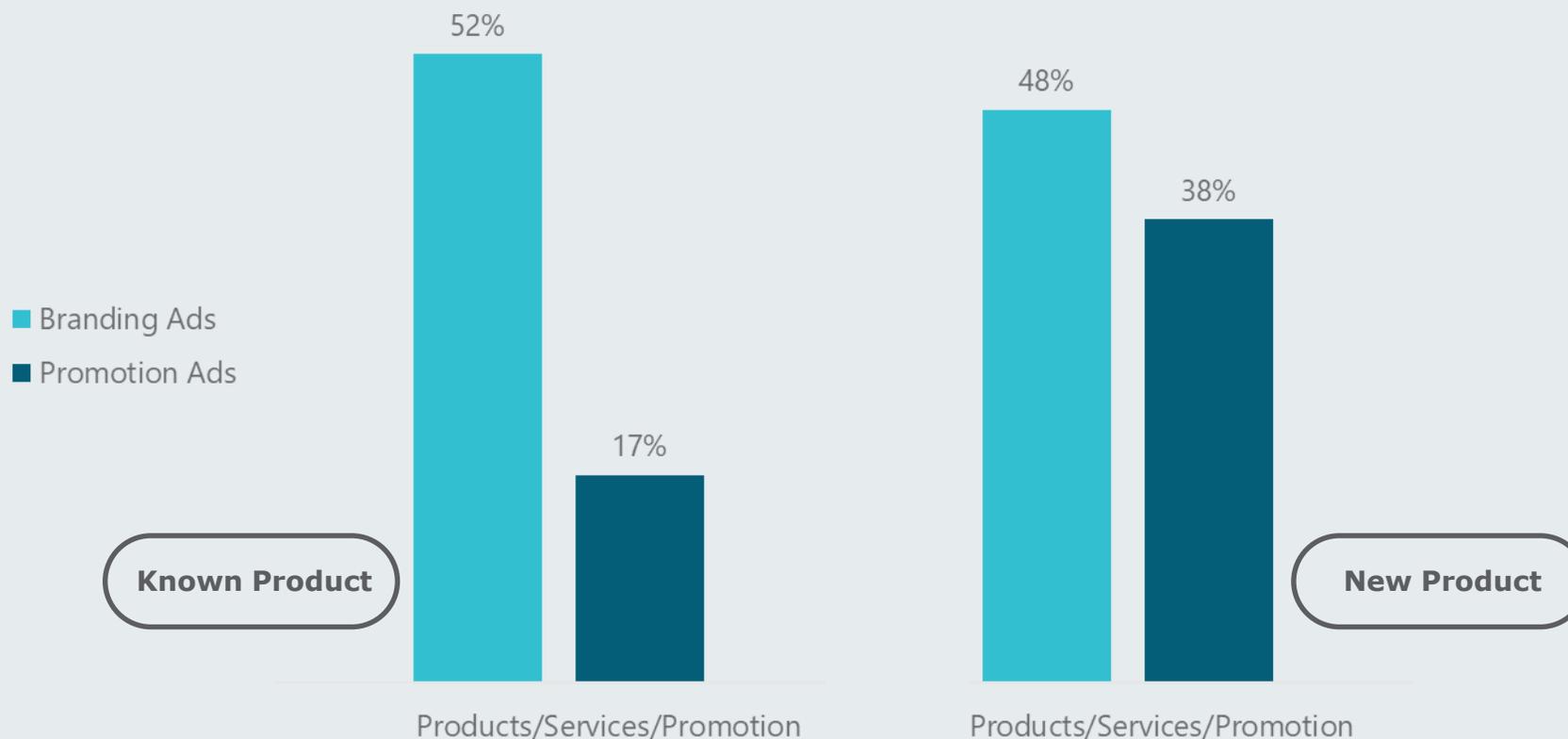
(*) Q: What genres of online games have you played for the past 4 weeks?

A top-down view of two pairs of hands holding smartphones against a dark, marbled background. The top pair of hands is holding a smartphone with a thumbs-up icon on the screen. The bottom pair of hands is holding a smartphone with a refresh icon on the screen.

Advertiser question #4

WHAT TYPE OF AD AND AD CONTENT
SHOULD I SERVE TO GAMERS?

Acceptance of ad content



Acceptance of ad content

Overall, gamers do not like ads, but if they have to watch/see an ad, many of them are comfortable with ads about products or services that they have already known about than any other types of ad content.

(*) Q: Which of the following ads information that you are comfortable watching/seeing when you're playing mobile games?

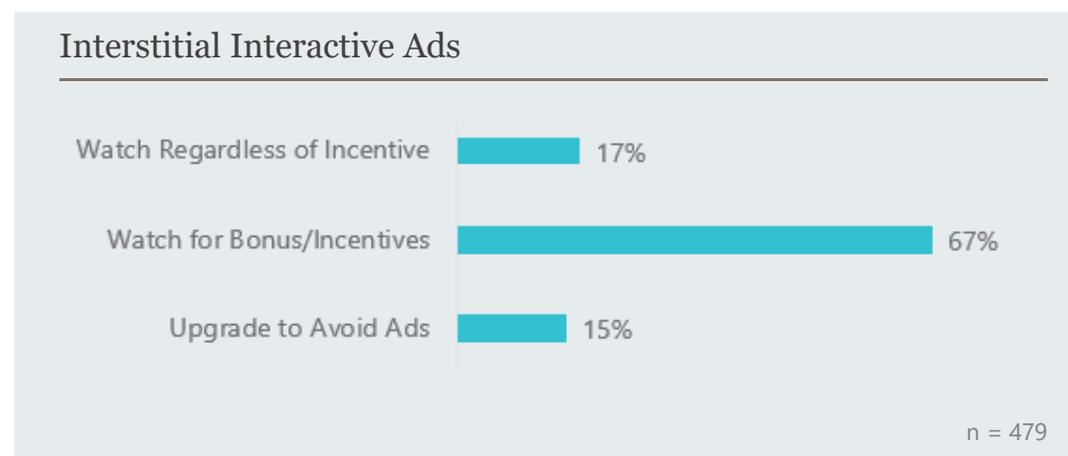
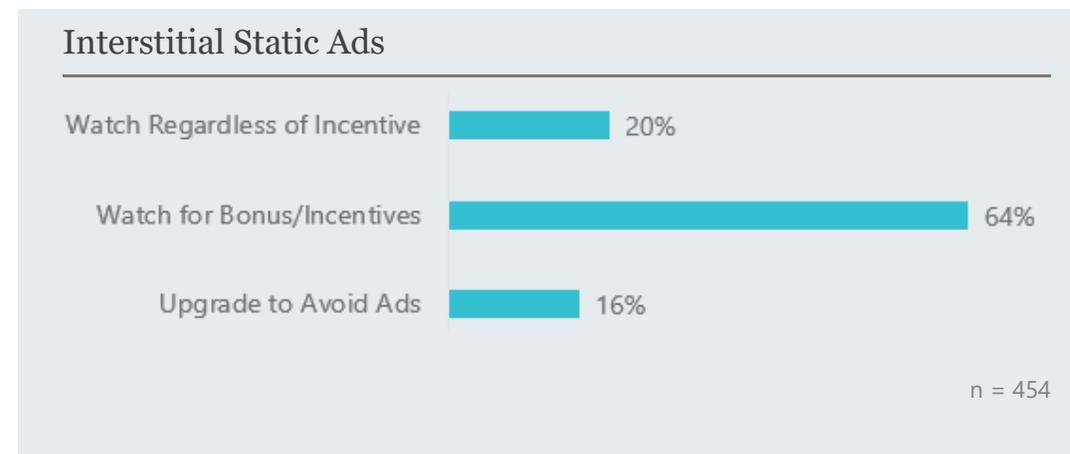
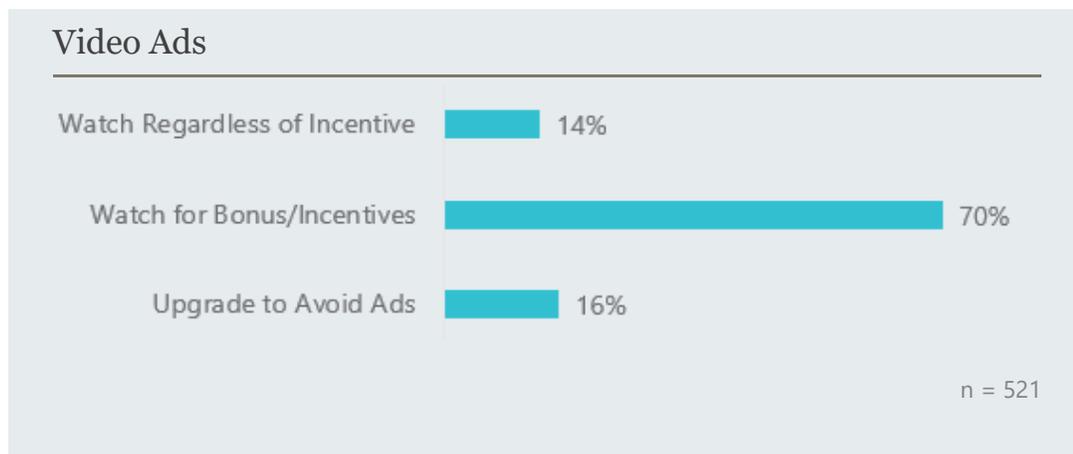
n = 858

Advertiser question #5

WHAT CAN I DO TO ENGAGE GAMERS
WITH MY ADS?

Gamers reactions to in-game ads

Gamers are not really willing to upgrade to avoid them but bonus or incentive provides good motivation for them to engage with the ads. (**)

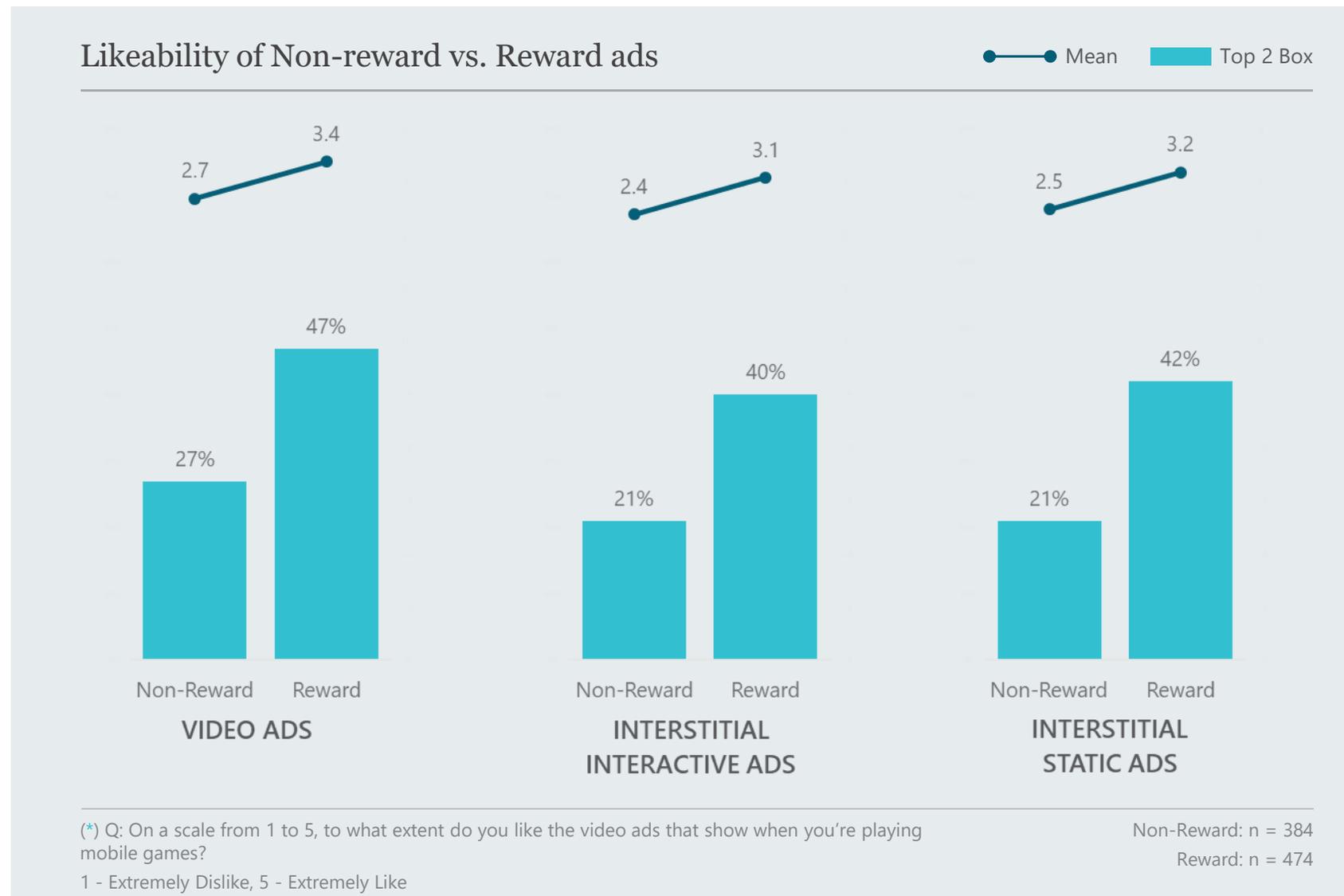


(*) Q: Which of the following action would you most likely to do when you see an ad while playing mobile games?

(**) Exclude people who chose to close/skip ads

The role of reward ads

The effect of reward in exchange of seeing an ad is certain. Given the rewards, gamers' likeability towards ads improves significantly.



The role of reward for video ads

Although rewards significantly lift the favorability of Video Ads, they do not help to prolong the maximum tolerated length.

	LIKEABILITY MEAN SCORE	LIKEABILITY TOP 2 BOX	AVERAGE TOLERATED LENGTH (SECONDS)
NON REWARDED VIDEO ADS n = 384	2.7***	27%***	19
REWARDED VIDEO ADS n = 474	3.4	47%	20

*** Significantly lower than the rewarded video ads at 99% confidence interval

(*) Q: On a scale from 1 to 5, to what extent do you like the video ads that show when you're playing mobile games?

1 - Extremely Dislike, 5 - Extremely Like

Country summary

WHO CAN I REACH IF I SERVE MY AD INSIDE THE GAME APPS?

- Females and Males up to the age of 44 years old, especially Moms with young Kids

HOW MUCH FACETIME CAN I HAVE WITH THOSE GAMERS?

- More facetime and more frequently with Females (60 minutes) than Males (52 minutes)

WHERE AND WHEN CAN I CATCH THOSE GAMERS?

- At home and at night, between 7PM-10PM
- For Moms, early morning and late night are also a good time to catch them
- In Puzzle, Action, Adventure and Strategy games

WHAT TYPE OF AD AND AD CONTENT SHOULD I SERVE TO GAMERS?

- Ads that introduce a new promotion or branding ads from brands that are familiar to them

WHAT CAN I DO TO ENGAGE GAMERS WITH MY ADS?

- Offer rewards for watching ads; however, they only enhance the favorability of the ads, not the maximum acceptable length of video

Appendix



Target population and sampling

- Target population:
 - Nationally representative of online population (online & offline) age 16+ in each surveyed country
- Achieved Sample Size for Survey 1:
 - Vietnam: n = 853 with 146 Moms with Kids under 12 years old
 - Philippines: n = 893 with 88 Moms with Kids under 12 years old
 - Indonesia: n = 1,074 with 214 Moms with Kids under 12 years old
 - Thailand: n = 1,406 with 133 Moms with Kids under 12 years old
- Achieved Sample Size for Survey 2:
 - Vietnam: n = 778 with 97 Moms Kids under 12 years old
 - Philippines: n = 570 with 122 Moms with Kids under 12 years old
 - Indonesia: n = 1,483 with 187 Moms with Kids under 12 years old
 - Thailand: n = 858 with 182 Moms with Kids under 12 years old
- Weighting:
 - Data was weighted according to the distribution of the internet population combining from Local Census Data and Google Barometer (except Vietnam where the distribution obtained from internal research)

Data collection

- Survey data was collected in all countries via online surveys (CAWI):
 - Sample was drawn through random invitations sent to Decision Lab Online Communities
 - Invitation was sent through their email addresses and notifications in social networks
 - Respondents answered the scripted survey online on their own devices at their own convenient time
- Survey is administered with the following languages:
 - Vietnam: Vietnamese
 - Philippines: English
 - Indonesia: Indonesian
 - Thailand: Thai
- Interview Length:
 - 7 minutes for each survey or
 - 14 minutes for the combined survey
- Timing:
 - Fieldwork for all countries ran from July 23 to August 15 of 2018



Reach out to us

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