WHITE PAPER

THE STATE OF INDONESIA'S GAME INDUSTRY

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Agate is proud to present The State of Indonesia's Game Industry White Paper, a comprehensive report on Indonesia's gaming industry. This white paper marks a major milestone as the first in-depth report of its kind. Through this initiative, we aim to provide a clearer understanding of Indonesia's gaming landscape and offer valuable insights to help industry players, policymakers, and stakeholders navigate upcoming opportunities and challenges.

This report compiles essential data on Indonesia's gaming industry, covering market potential, regulatory environment, and ecosystem growth. Rather than providing a definitive conclusion, the information presented here is intended to serve as a foundation for informed decision-making and to spark discussions that drive the industry forward.

We explore Indonesia's gaming industry, examine how it is influenced by global trends, and provide insights into its potential. We also highlight how Indonesia's gaming industry has demonstrated resilience and built a growing competitive edge. These developments reaffirm our belief that Indonesia is on track to become a leading force in the global gaming scene.

As Indonesia's gaming industry continues to evolve, collaboration between developers, businesses, government, and investors will be essential. We hope this report provides a valuable resource to guide future strategies and support the industry's long-term success.

Shieny Aprilia
Co-Founder and Chief Executive Officer at Agate

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As the largest game development company in Indonesia and one of the biggest in Southeast Asia, Agate takes pride in helping to build the local gaming industry through initiatives such as this white paper. However, this milestone is not ours alone. Over the past 16 years, we have witnessed the industry's growth, driven by collaboration among the government, studios, regulators, businesses, and the community. All have contributed to the creation of The State of Indonesia's Game Industry White Paper, and we thank them for their support.

The local gaming industry has grown rapidly, from both user and developer perspectives. Indonesian users are spending more on games, but this has not fully translated into benefits for the local ecosystem. Meanwhile, local developers are producing higher-quality games that are increasingly competitive on a global scale. Addressing these challenges is critical to strengthening the ecosystem.

We are optimistic about the future, especially with the government's strong support through Presidential Regulation (PERPRES) No. 19/2024, which aims to accelerate the development of the national gaming industry.

While challenges remain, we believe that through collaboration, we can create a stronger local gaming ecosystem and deliver engaging experiences to everyone.

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ABOUT THIS WHITE PAPER

This research employs a mixed-methods approach to address market challenges in the Indonesian gaming industry by combining open-source data with in-depth interviews of key industry figures. This approach ensures that the findings are grounded in both quantitative data and qualitative perspectives, providing a robust foundation for the recommendations and conclusions presented in this white paper.

The research was conducted from August 2024 to February 2025. Please note that due to changes in government structure in October 2024, some ministry names and officials' titles may have changed since the time of research.

We collected data from a range of publicly available sources to ensure a comprehensive dataset. This includes:

News releases : Information was extracted from news articles, press releases, and industry reports.

Free source data : Data was drawn from publicly available databases and reports.

Analytics tools : Insights on market trends, user behavior, and industry metrics were gathered using free analytics tools.

In-depth interviews : In-depth interviews were conducted with key players in the industry, including both government officials and company representatives with significant influence in the Indonesian gaming market.

List of Interviewees:
- Luat Sihombing - Program Coordinator for Game, Animation, and New Technology at Ministry of Communication and Information Technology of the Republic of Indonesia (2019 – 2024)
- Liz Zeny Merry - Assistant Deputy for Creative Economy Development Ministry for Investment and Maritime Affairs (2019 – 2024)
- Muhammad Neil El Himam - Deputy Chairman for Digital Economy and Creative Products at Ministry of Tourism and Creative Economy - Ministry of Tourism and Creative Economy (2019 – 2024)
- Cipto Adiguno - President of Indonesian Game Association (2019 – 2024)
- Azwin Nugraha - PR Manager Moonton Indonesia

The statements reflect the views of Agate and are intended for educational purposes. Although we make every effort to ensure the information is accurate and up to date, there may still be inadvertent errors or misprints.

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EXECUTIVE SUMMARY

1 Indonesia is the third-largest country globally for game downloads (3.37 billion in 2022). The domestic market is worth USD 2.5 billion, but foreign titles dominate 99.5% of revenues, leaving local games with only 0.5%

2 Mobile gaming drives growth. In 2023, gamers spent USD 370 million on in-app purchases, up 15.6% from 2022. Hyper-casual and simulation genres lead downloads, reflecting demand for accessible and quick entertainment.

3 Esports is booming, with events like the Piala Presiden Esports expanding prize pools, visibility, and inclusivity. Women's divisions and local titles are gaining traction, positioning Indonesia as a regional esports hub.

4 Indonesian games like Coffee Talk, Potion Permit, A Space for the Unbound, and Coral Island sold over 1.3 million copies on Steam, generating USD 22.3 million. These prove local studios can achieve global recognition.

5 Developers largely depend on personal savings or foreign capital, with limited access to structured local investment. Government initiatives under Presidential Regulation No. 19/2024 aim to create financing schemes through banks, venture capital, and public agencies.

6 The government updated the Indonesia Game Rating System (IGRS) and introduced the POP-HC copyright system, making compliance and protection easier. Still, frequent regulatory changes and weak enforcement create ongoing uncertainty.

7 Indonesia has abundant creativity, but lacks technical expertise in programming, game design, and project management. This shortage makes it harder for studios to achieve international quality, forcing many to rely on outsourcing or foreign partners. Stronger training and talent development are needed to close this gap.

8 Presidential Regulation No. 19/2024 establishes seven acceleration programs, targeting funding, talent, promotion, infrastructure, regulations, hardware, and global activation. This marks the most structured government support for the industry to date.

9 With 192 million gamers forecasted by 2025 (43% of Southeast Asia's total) and rising GDP per capita, Indonesia is positioned to evolve from a consumer-driven market into a globally competitive hub for game development and esports leadership.

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TABLE OF CONTENTS

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Chapter 1

REGULATORY ENVIRONMENT

INDONESIA REGULATORY LANDSCAPE

The gaming industry now plays a pivotal role in national economic strategies, as outlined in **Presidential Regulation No. 19/2024**. Given this, ambitious programs and objectives have been established to accelerate its development, recognizing gaming as a vital sub-sector within the creative economy.

Focusing on this sector, the government aims to foster economic transformation, enhance national competitiveness, and boost contributions to the national economy. This includes increasing value-added outputs, gross domestic product (GDP), job creation, and export growth in both the creative and digital economies.

The regulation establishes an Acceleration Program to develop the National Game Industry, assigning various ministries and institutions to oversee it.

Leadership	The Coordinating Minister for Maritime Affairs and Investment acts as the program director and chairman.
Supporting members	Several high-ranking officials, including ministers overseeing politics, economy, culture, and finance, along with the Chief of the Presidential Staff and the Governor of Bank Indonesia, serve as deputy directors.
Execution team	• The Minister of Tourism and Creative Economy leads the daily execution as chairman. • The Minister of Communication and Informatics serves as the deputy chairman. • Additional support comes from ministers handling home affairs, law, finance, education, technology, manpower, industry, trade, national planning, youth, and innovation.

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"Indonesia is the third largest country in the world for game downloads, with 3.37 billion downloads in 2022. This potential should not be overlooked. Indonesia should not only be a growing target market for the global gaming industry; it should also reap economic benefits from it. Currently, the domestic market is valued at USD 2.5 billion. However, **the market is still dominated by foreign games, which hold 99.5% of the market, leaving local games with just 0.5%.** This significant potential needs to be recognized to secure support from various stakeholders."

Liz Zeny Merry

Acting Deputy Assistant for Creative Economy Development, Coordinating Ministry for Maritime Affairs and Investment

(2019 – 2024)

IMAGE SOURCE: ALUCARD (MOBILE LEGEND), WANDERER (GENSHIN IMPACT), RED WHITE CINDERELLA (MEMORIES), MEGA RAYQUAZA (POKEMON), SEA FAIRY (COOKIE RUN), SPRAYBOT (RIFTSTORM)

INDONESIA REGULATORY LANDSCAPE

PROGRAMS TO ACCELERATE THE DEVELOPMENT OF GAME INDUSTRY

Seven Strategic Programs to Accelerate the Gaming Industry

Challenges in the gaming industry are being addressed through dedicated programs and activities designed to meet the sector's unique needs. The formulation of this Presidential Regulation involved thorough consultation with industry associations to ensure that the resulting policies and programs are responsive to the real-world needs and challenges of the industry. Rather than being developed arbitrarily, these programs are carefully tailored to address the industry's priorities.

This strategic approach is structured around seven comprehensive programs aimed at accelerating the development of the National Gaming Industry.

DEVELOPMENT OF HUMAN RESOURCES FOR THE NATIONAL GAMING INDUSTRY

OPENING ACCESS TO FINANCING AND CAPITAL FOR THE NATIONAL GAMING INDUSTRY

ENHANCEMENT OF PROMOTION AND MARKET ACCESS FOR THE NATIONAL GAMING INDUSTRY

PROVISION OF ADEQUATE AND COMPETITIVE TECHNOLOGICAL INFRASTRUCTURE TO SUPPORT THE DEVELOPMENT OF THE NATIONAL GAMING INDUSTRY

FORMULATION OF REGULATIONS AND LEGISLATION TO STRENGTHEN THE NATIONAL GAMING INDUSTRY ECOSYSTEM

DEVELOPMENT OF HARDWARE INDUSTRY FOR THE NATIONAL GAMING SECTOR

ACTIVATION OF NATIONAL GAMING IN REGIONAL AND GLOBAL MARKETS

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The detailed program includes the types of activities and the objectives to be achieved.

One of the seven programs outlined in the presidential regulation

The ministries and governmental legal bodies involved

"The appendix precisely outlines each ministry's responsibilities, making sure that any inquiries or issues can be directly addressed in line with the implemented programs. For a comprehensive view of the challenges and their solutions, we can refer to page 20 of the PERPRES (re: Presidential Regulation), where detailed information is available alongside the related programs listed in the appendix." **Liz Zeny Merry added.**

CAPITAL ACCESS FOR GAME DEVELOPER AND PUBLISHER

The gaming industry in Indonesia is facing three main challenges: capital constraints, a limited number of developers, and the need to improve talent skills. Capital remains the primary challenge, requiring industry stakeholders to address several key business aspects, including:

LIMITED ACCESS TO FUNDING, INVESTMENT, AND BUSINESS MATCHMAKING

Developers struggle to secure local investment due to weak financial support and limited matchmaking opportunities.

CAPITAL IS STILL PRIMARILY FUELED BY PERSONAL SPENDING

Many studios rely on personal savings to fund projects, as loans and structured investments are difficult to obtain.

OUTSOURCED FUNDING IS DOMINATED BY FOREIGN SOURCES

With limited local funding, developers must seek global investors, where competition is much tougher.

To address these issues, Presidential Regulation No. 19/2024 assigns the Ministry of Tourism and Creative Economy (Kemenparekraf) the responsibility of establishing access to funding and capital for the national gaming industry.

"Together with the Ministry of Finance, the Ministry of Tourism and Creative Economy will **develop a pilot program to fund creative content** through BLU (re: Badan Layanan Umum - Public Service Agency), focusing on Indonesia's game industry. The program is currently being finalized and will be launched in the near future."

Muhammad Neil El Himam

Deputy Chairman for Digital Economy and Creative Products at Ministry of Tourism and Creative Economy

(2019 – 2024)

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CAPITAL ACCESS FOR GAME DEVELOPER AND PUBLISHER

NEW FINANCING MODEL IN THE MAKING

In 2025, the government will also collaborate with the Association of State-Owned Banks (Himpunan Bank Negara – Himbara), the Indonesian Game Association (Asosiasi Game Indonesia – AGI), and the Indonesian Intellectual Property Center Association (Asosiasi Sentra Kekayaan Intelektual Indonesia – ASKII) to develop financing systems in collaboration with the banking sector, tailored to intellectual property-based businesses. This will serve as another solution to unlock capital for game developers. To foster a healthy ecosystem, the government is developing guidelines on business competition and collaboration in the gaming industry.

Neil El Himam said, "The Directorate of Digital Economy Governance has been tasked with creating regulations on business competition and collaboration. We have already discussed the matter with relevant stakeholders, including those involved in KPPU (Komisi Pengawas Persaingan Usaha – Commission for the Supervision of Business Competition).
Our goal is to create a healthy and fair business ecosystem in the digital economy sector, especially for the gaming industry, so that businesses can continue to grow."

In conclusion, it remains challenging for local developers and publishers to secure the financial support they need to expand their businesses, given that the industry is still in its early stages of development. The government's structured plans are still being developed; therefore, the effectiveness of these programs in supporting local games has yet to be proven. However, the acceleration plan outlined in Presidential Regulation No. 19/2024 demonstrates the government's commitment to nurturing the industry.

The government is currently working on a financing model that involves securing investments through matching funds and venture capital.

The goal is to have a system that will provide at least

USD 40 million

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LICENSING, INTELLECTUAL PROPERTY, AND COPYRIGHT

Video games are a unique blend of intellectual properties. They combine music, storytelling, visuals, and characters into one immersive experience that takes players on a multidimensional interactive journey. Although we may perceive video games as a singular entity, they are in fact a fusion of diverse creative elements.

	CATEGORY 1	CATEGORY 2	CATEGORY 3
DEFINITION	as Computer Programs	as Distributive Works	as Audiovisual Works
REASON	Highlighting on their dependency on software for the implementation and their digital nature.	Due to their complexity, which involves literary, graphic, audiovisual, and other elements, these components are classified and protected separately based on their specific nature.	Emphasizes the visual and auditory elements of the game, while also acknowledging and protecting the underlying software.
COUNTRIES INCLUDE	Argentina 🇦🇷 / Canada 🇨🇦 / China 🇨🇳 / Israel 🇮🇱 / Italy 🇮🇹 / Russian Federation 🇷🇺 / Singapore 🇸🇬 / Spain 🇪🇸 / Uruguay 🇺🇾 /	Belgium 🇧🇪 / Brazil 🇧🇷 / Denmark 🇩🇰 / Egypt 🇪🇬 / France 🇫🇷 / Germany 🇩🇪 / India 🇮🇳 / Japan 🇯🇵 / South Africa 🇿🇦 / Sweden 🇸🇪 / United States of America 🇺🇸	Kenya 🇰🇪 / Republic of Korea 🇰🇷

Under Indonesian law, there is currently no clear definition of what constitutes a video game. The closest interpretation is found in Article 1, Number 9 of the Indonesian Copyright Law (2014), which aligns with Category 1: *"Computer programs are sets of instructions expressed in the form of language, code, schematics, or in any other form intended to make a computer operate to perform a certain function or achieve a specific result."*

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LICENSING, INTELLECTUAL PROPERTY, AND COPYRIGHT

COPYRIGHT PROTECTION AND RECORDATION IN INDONESIA

Indonesia's current Trademark, Patent, Industrial Design, and Copyright Laws require all Intellectual Property (IP) license agreements to be recorded to have binding force for third parties. Since the enactment of Government Regulation No. 36 of 2018 on the Recording of IP License Agreements (GR 36/2018), the process has been carried out by Indonesia's Directorate-General of Intellectual Property (DGIP).

According to data from the Directorate General of Intellectual Property (DJKI) of the Ministry of Law and Human Rights of the Republic of Indonesia, there is currently an average of 454 copyright registration applications per day. Proof of copyright ownership, typically in the form of a copyright certificate, is required to record a copyright license agreement. This requirement stems from GR 36/2018, which stipulates that before any licensing agreement for a work can be recorded, the work itself must first be registered with the Directorate General of Intellectual Property (DGIP).

Fortunately, obtaining this certificate has become much simpler in recent years. On December 20, 2021, the DGIP implemented a significant change designed to accelerate the copyright registration process. Decision No. HKI-05.TI.03.02 of 2021 introduced the POP-HC system, which stands for *Persetujuan Otomatis Pencatatan Hak Cipta* or Automatic Approval in Copyright Registration Recording System. Razilu, Acting Director General of Intellectual Property, said, "This refinement is concrete proof of our support for accelerating the national economy, specifically through the advancement of science, art, and literature."

This new system has significantly accelerated the process. What once took 14 working days can now be completed in just 10 minutes. By automating the previously complex bureaucratic procedures, the POP-HC system not only simplifies the application process but also enhances efficiency by providing copyright certificates in electronic format.

"In the gaming context, the process involves creation, protection, and commercialization. Once a game is created, it should be protected first and then commercialized. Most of the time, the commercialization part can be done effectively, as well as licensing and franchising. However, the real challenge lies in enforcing protection, especially in combating piracy."

Muhammad Neil El Himam

Deputy Chairman for Digital Economy and Creative Products at Ministry of Tourism and Creative Economy

(2019 – 2024)

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MARKETING AND PROMOTION

As the global gaming industry continues to grow, market competition has become increasingly challenging and complex for local games. According to Sihombing, Program Coordinator for Game, Animation, and New Technology at the Ministry of Communication and Information Technology of the Republic of Indonesia (Kominfo), there are several challenges in promoting locally developed games in the domestic market, including:

COMPETITION WITH GLOBAL GAMES

Global games usually have greater financial resources, enabling them to conduct large-scale marketing activities.

GLOBAL ESPORTS PUBLISHERS

These publishers regularly host tournaments and esports events, generating greater interest in global games.

MARKETING STRATEGY

The limited financial capacity makes it difficult for local marketing efforts to compete. This challenge is compounded by a lack of understanding of the importance of game marketing, resulting in marketing budget allocation not being prioritized.

These three challenges make it more difficult for local developers to compete with the popularity of global games. The government is actively working to address this issue. Following the release of Presidential Regulation No. 19/2024, the government has planned several marketing initiatives to support locally developed games in Indonesia. This will be a collective effort across multiple ministries, pooling resources to support the local gaming industry.

CEREMONIES AND CELEBRATIONS

GAME AWARDS IN INDONESIA

In Indonesia, this commitment is reflected in the Indonesia Game Awards, which are usually held in Q4 of the annual game calendar. The Indonesia Game Awards are held during the Indonesia Game Developer Exchange (IGDX), an annual event organized by Asosiasi Game Indonesia (AGI) and the Ministry of Communication and Information Technology (Kemenkominfo). The awards demonstrate a commitment to nurturing local talent and advancing the gaming industry.

The Indonesia Game Awards honor games in the following categories, with 2024's winners including:

Best visual art
CORAL ISLAND
By Stairways Studio
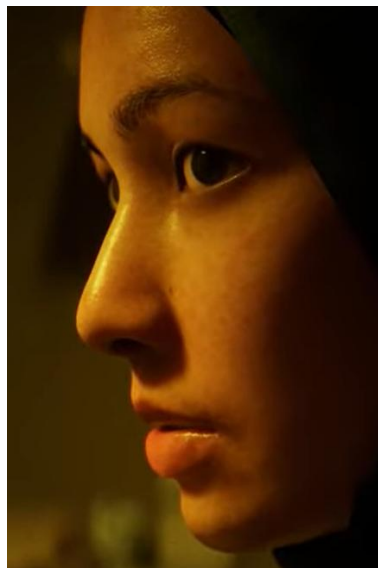
Most anticipated game
PROJECT AGNI
By Separuh Interactive
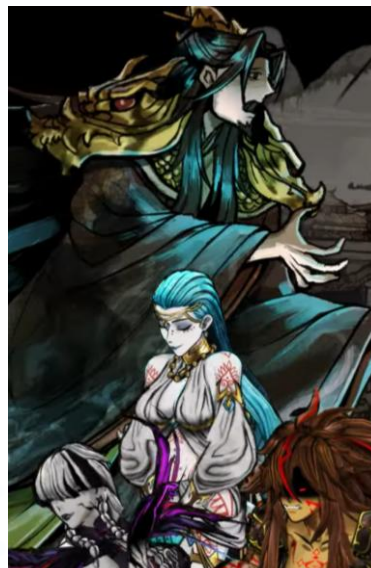
Best narrative
MY LOVELY EMPRESS
By Gamechanger Studio

Best audio/soundtrack
DREADHAUNT
By Digital Happiness
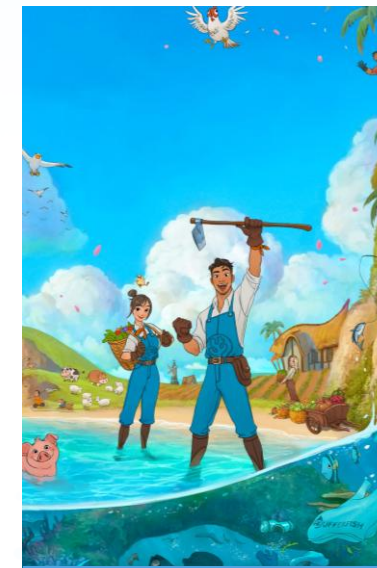
Game of the year Indonesia
CORAL ISLAND
By Stairways Studio

Honorary award
MOHAMMAD SAFRODIN

While honoring the creativity and technical prowess of Indonesian developers, this event also conforms to global standards. This highlights Indonesia's growing presence on the international stage. By providing a venue for local developers to shine, the awards help build a stronger community and foster a culture of growth and excellence within the Indonesian gaming industry. Moreover, these ceremonies demonstrate the government's active support across a broader scope of the gaming industry.

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COMMUNITY BUILDING AND ENGAGEMENT

In line with Presidential Regulation No. 19/2024, a key initiative has been introduced to advance the national gaming industry, which involves the annual promotion of Indonesian games. Thirty games will be promoted internationally and one hundred games domestically. This program is currently being formulated, and its overall impact has yet to be fully assessed.

Notable initiatives within this program include IGDX and Game Prime, which contribute significantly to these goals.
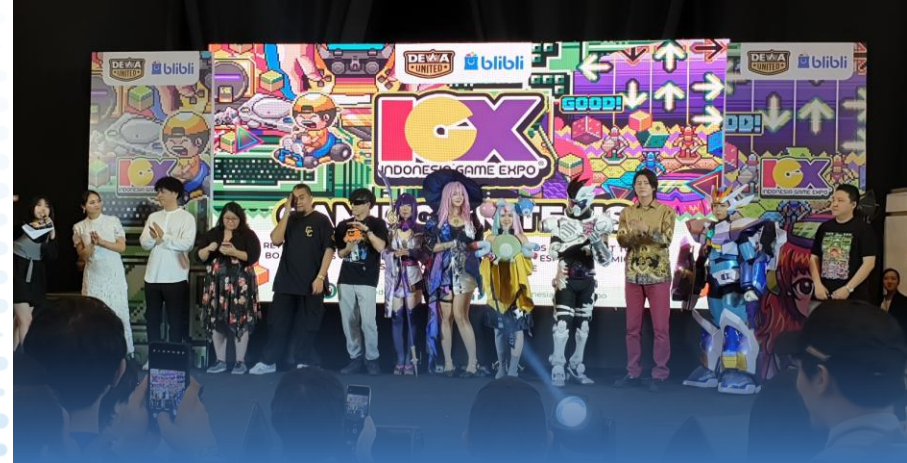
CEREMONIES AND CELEBRATIONS

INDONESIA GAME DEVELOPER EXCHANGE

IGDX INDONESIA GAME DEVELOPER EXCHANGE

The Indonesia Game Developer eXchange (IGDX) is an accelerator initiative organized by the Ministry of Communications and Informatics in partnership with the Indonesian Game Association (Asosiasi Game Indonesia – AGI). IGDX is recognized as the largest game developer event in Southeast Asia, catering specifically to a specialized audience of developers and publishers. While this limited target group makes the event smaller in scale, its impact remains substantial due to its high relevance and strong potential for industry transactions.

The Indonesian Government, through the Ministry of Communications and Informatics, has been a driving force behind the country's flourishing game industry. Since its launch in 2019, IGDX has served as a testament to the government's commitment to supporting local developers by providing a platform to showcase their talents and drive industry growth.

"IGDX has been running since 2018. It is segmented as a B2B event aiming to be clean and focused, with only relevant parties (re: developers and publishers) attending. The goal is to maximize transactions by directly connecting these parties. We take a different approach from other events like Gamescom Asia in Singapore or Level Up KL in Kuala Lumpur, where feedback indicates that 30-50% of attendees were not relevant, as they included entities such as payment gateways, middle tools, or foreign governments seeking investment opportunities."

IGDX 2024 HIGHLIGHT

468
Business visitors

1,602
Meetings in 3 days

275
Attendees took part in multiple meetings

Cipto Adiguno

President of Indonesian Gaming Association (AGI)

(2019 – 2024)

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CEREMONIES AND CELEBRATIONS

GAME PRIME

Through the Creative Economy Agency (Bekraf), the government is collaborating with the Indonesian Game Association (AGI) and GGWP Media to once again host Game Prime. This is the largest national gaming event, serving as a marketing platform for local developers and publishers. It also provides a space for players and consumers in the national gaming industry to engage with local games and meet key players.

Established in 2016, Game Prime showcases local games and returned on August 17–18, 2024, after a hiatus since 2021. The event attracted 10,096 visitors and more than 200 local developers. In addition, it offered free booth spaces for 20 local game companies to showcase their work. The event aims to broaden the gaming audience beyond traditional gamers, emphasizing the positive impact of gaming when enjoyed in moderation.

Game Prime targets a wider demographic, particularly adult and teenage gamers seeking new experiences, while addressing competition from companies like Tencent, Moonton, and Garena. This focus enables local developers to tap into secondary markets and reach less crowded audiences effectively.

"The year 2024 was the return of Baparekraf's (re: Badan Pariwisata dan Ekonomi Kreatif - Tourism and Creative Economy Agency) Game Prime being held offline. We wanted this event to truly highlight the local gaming industry so that it can reach more people."

Brian Chuang
Head of GGWP Media

CEREMONIES AND CELEBRATIONS

GOVERNMENT SUPPORT IN ESPORTS TOURNAMENTS

The rapid growth of esports in Indonesia has captured the government's attention and generated strong support for this creative industry. This progress is attributed to initiatives from the Ministry of Creative Economy (BEKRAF)—now the Ministry of Tourism and Creative Economy (Kemenparekraf)—the Presidential Staff Office (KSP), the Ministry of Youth and Sports (KEMENPORA), and the Ministry of Communication and Information Technology (KEMENKOMINFO). These government institutions subsequently collaborated with the Indonesia Esports Premier League (IESPL) to organize the prestigious tournament.

Muhammad Neil El Himam also stated,

"You might have heard of the Piala Presiden Esports (re: Presidential Esports Cup). When we started organizing it under Bekraf, we were initially focused on using foreign games because we hadn't yet identified suitable local games. However, Pak Triawan, the former head of Bekraf, emphasized that local games should be included in the tournament."

CEREMONIES AND CELEBRATIONS

LIST OF GAME PLAYED IN PIALA PRESIDENT ESPORTS

2019 — MOBILE LEGENDS BANG BANG

2020 — MOBILE LEGENDS BANG BANG | FREE FIRE | eFootball PES2020 | FRUIT DART · MOBILE PREMIER LEAGUE

2021 — MOBILE LEGENDS BANG BANG | FREE FIRE | eFootball PES2021 | PUBG MOBILE | SPEED CHESS CHAMPIONSHIP · MOBILE PREMIER LEAGUE | LOKAPALA | BATTLE OF SATRIA DEWA

2022 — MOBILE LEGENDS BANG BANG | FREE FIRE | PUBG MOBILE | LOKAPALA | BATTLE OF SATRIA DEWA | BATTLE OF GUARDIANS

2023 — MOBILE LEGENDS BANG BANG MEN CATEGORY | MOBILE LEGENDS BANG BANG WOMEN CATEGORY | LOKAPALA | BATTLE OF GUARDIANS

Local games were first included in the President's Cup Esports (PPE) in 2021. Building on this progress, PPE 2022 introduced a submission system for one additional game. Following the screening process, Battle of Guardians was selected as the official local game for the 2022 President's Cup Esports. It also stood out as the sole PC title featured in that year's competition. By including local games, PPE aimed to attract more local gaming communities. Additionally, with participation numbers still relatively low, players had a higher chance of winning in local game tournaments. Reflecting the growing appeal of esports among women in Indonesia, the 2023 Mobile Legends competition was divided into two separate divisions: men's and women's. This demonstrates how, over the years, the President's Cup Esports (PPE) has advanced efforts to showcase local games while promoting inclusivity.

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AGE RATINGS AND CONTENT CLASSIFICATIONS

The Indonesia Game Rating System (IGRS) was first established by Indonesia's Ministry of Communication and Informatics in 2018 and later updated in 2024. It provides age classifications for video games and apps distributed within Indonesia. It is integrated into the International Age Rating Coalition (IARC) framework, which streamlines age rating processes across multiple regions. This integration means that when developers submit their games through platforms like Google Play or the Microsoft Store and complete the IARC questionnaire, they receive age ratings applicable to various regions, including Indonesia.

If your game complies with IGRS standards and you distribute it through platforms that utilize IARC (like Google Play), it will automatically receive appropriate age ratings for other participating regions. This alignment simplifies the process of reaching a global audience while adhering to local content regulations.

Registration for IGRS is free and can be done directly by developers or publishers online by accessing www.igrs.id and providing information related to the game being registered.

1 FILL OUT THE REGISTRATION FORM

2 RECEIVE AN ACTIVATION EMAIL

3 ACTIVATE BY COMPLETING YOUR PROFILE

4 LOG IN AND SUBMIT ACTIVATION REQUEST

The rating system in Indonesia is divided into five age groups

3+ IGRS

SUITABLE FOR AGES 3 AND UP
Content must be free from tobacco, alcohol, drugs, violence, blood, mutilation, cannibalism, profanity, adult humor, sexual content, pornography, gambling, horror, and online chat.

7+ IGRS

SUITABLE FOR AGES 7 AND UP
Content must be free from tobacco, alcohol, drugs, violence, mutilation, cannibalism, profanity, adult humor, sexual content, pornography, gambling, horror, and online chat. Blood depiction allowed but must not resemble real blood.

13+ IGRS

SUITABLE FOR AGES 13 AND UP
Content must be free from tobacco, alcohol, drugs, mutilation and cannibalism on human, adult humor, sexual content, pornography, gambling, and horror. Mild animated violence and blood are allowed. Online chat features permitted with profanity filters.

15+ IGRS

SUITABLE FOR AGES 15 AND UP
Content must be free from tobacco, alcohol, drugs, mutilation and cannibalism on human, sexual content, pornography, gambling, horror. Animated violence and mild mature humor (non-sexual) are allowed. Online chat features permitted with profanity filters.

18+ IGRS

SUITABLE FOR AGES 18 AND UP
Content may include depictions of tobacco, alcohol, drugs, animated violence, blood, mutilation, cannibalism, sexual humor (without nudity), simulated gambling, horror themes, and online chat features. Must be free from pornography and real gambling involving real money or tradeable digital assets.

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AGE RATINGS AND CONTENT CLASSIFICATION

ABOUT IGRS

Initially, the Indonesia Game Rating System (IGRS) was designed for domestically developed games. However, in 2024, the Ministry revised the regulations with the issuance of Ministerial Regulation Number 2 of 2024. This regulation requires all game publishers to establish a legal entity in Indonesia and submit their games to the Ministry for review by IGRS. Failure to comply may result in the game being banned from sale or access in Indonesia.

Before formulating the revised IGRS, the Ministry of Communication and Informatics (Kominfo) involved various stakeholders from both industry and government.

Quoting Sihombing: "Like any regulation-making process, it requires stakeholder involvement, starting with publishers, distributors, and platform owners. We conducted FGDs with them, followed by validation and comparative studies of rating systems in other countries. We actively involved industry players, including developers, publishers, distributors, and other relevant ministries and agencies, such as the Ministry of Education and Culture and the Child Protection Commission. After drafting the policy, we held public hearings to gather feedback. This process ensures active participation and input from various relevant parties."

IMPACT OF THE INDONESIA GAME RATING SYSTEM

With the implementation of IGRS, the government not only provides clear guidelines for developers but also helps educate the public. The system highlights that there are games suitable for children and specific age groups, aiming to shift public perception so that games are no longer viewed solely as harmful or negative. Beyond regulation, IGRS fosters shared awareness that age-appropriate games can serve as positive tools, including for educational purposes, especially in supporting children's learning and development.

"The public has responded positively. We have collaborated with the Ministry of Education and Culture to raise public awareness about the importance of product suitability, ensuring that each product serves a specific purpose. This helps provide guidelines for selecting game products, especially considering the different levels of awareness and understanding among the Indonesian public regarding games and ratings."

Luat Sihombing
Program Coordinator for Game, Animation, and New Technology at Ministry of Communication and Information Technology (2019 – 2024)

"The most significant impact has been seen when comparing the period before the existence of the rating system and after the implementation of IGRS in 2016. We have seen a gradual reduction in the pressure or concerns from MUI or KPAI suggesting games are harmful. Recently, there was an issue where KPAI mentioned that games are bad, but then they acknowledged that there is already a rating system from Kominfo. They are actually quite accommodating and understand that a well-implemented rating system is acceptable."

Cipto Adiguno
President of Indonesian Game Association (2019 – 2024)

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REGULATORY FRAMEWORK FOR ADAPTATION

Regulations continue to evolve in response to real-world conditions, industry needs, and practitioner feedback. According to Cipto Adiguno, President of the Indonesian Game Association (Asosiasi Game Indonesia – AGI), two international regulatory models offer valuable lessons that could be adapted to strengthen Indonesia's regulatory environment.

$ ADAPTATION OF FUNDING MODELS

Adapting funding models from Europe to Indonesia requires careful consideration. Among the French, German, and Polish approaches, the German model appears most feasible. Unlike France's refund-based system, Germany's approach allows developers to apply for partial government funding, supplemented by investors or personal resources. If the project succeeds, repayment is capped, providing both support and risk mitigation. Importantly, the funds must be spent within Indonesia—such as hiring local staff or renting facilities—ensuring that the investment benefits the local economy. This system aligns with the goal of maximizing economic returns through taxation and salaries while demonstrating clear value to the government.

PUBLISHER REGULATORY

Regulating game publishing is another key area that requires adaptation. In some countries, publishers must collaborate with local legal entities, helping retain revenue domestically. Indonesia could adopt a similar framework to strengthen local publishing and reduce revenue outflow. However, regulations must be carefully designed to avoid discouraging collaborations with international partners. The aim should be to encourage successful Indonesian games to be published locally, thereby keeping revenue in Indonesia while still fostering global partnerships. This balanced approach would support the growth of local enterprises and strengthen their position in the international market.

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Chapter 2

COMPETITIVE LANDSCAPE

GAME MONETIZATION

In 2024, the global games market is projected to generate USD 187.7 billion in revenue, representing a 2.1% year-on-year increase. The PC gaming segment, while the smallest, is expected to record the highest growth rate at 4.0%, reaching USD 43.2 billion. However, from 2025 onward, mobile and console revenues are forecasted to once again outpace PC growth.

Looking ahead, the global games market is expected to expand at a CAGR of 3.1% from 2022 to 2027, reaching USD 213.8 billion by 2027. The PC segment will continue steady growth after 2025, accounting for 22% of the total market. Meanwhile, console revenues are projected to accelerate, surpassing PC growth and contributing 30% of the market. By contrast, the mobile gaming sector has seen a decline in revenue share since the end of the pandemic, a trend that is anticipated to persist.

Global game revenue forecasts
2023 – 2027, in USD Bn

Actual | Forecast

213,8

187.7

182.9

183.9

2022A | 2023A | 2024F | 2027F
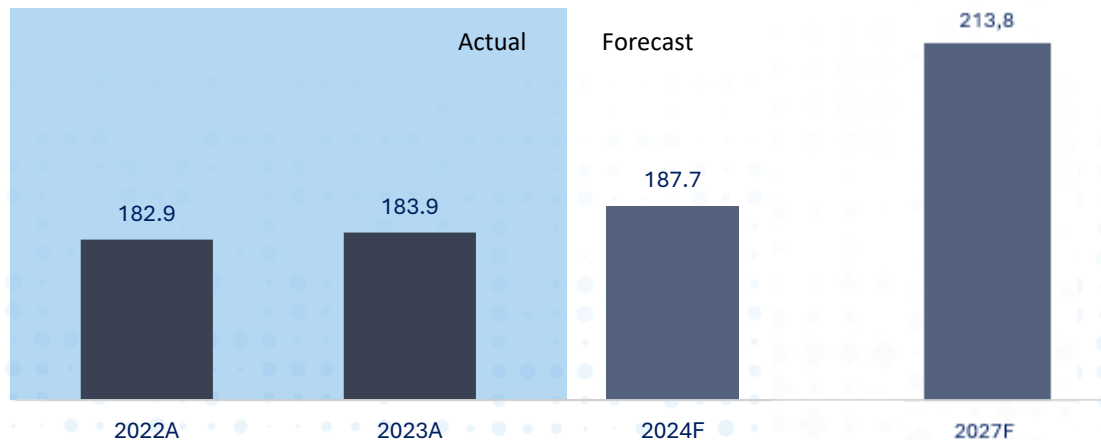
2024 Global Games Market per segment

Console USD 43.2 Bn
-1.0% YoY

28%

2024 TOTAL
USD 187.7 Bn
+2.1% YoY

49%

23%

Mobile
USD 92.6 Bn
+3.0% YoY

PC USD 43.2 Bn
+4.0% YoY

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GAME MONETIZATION
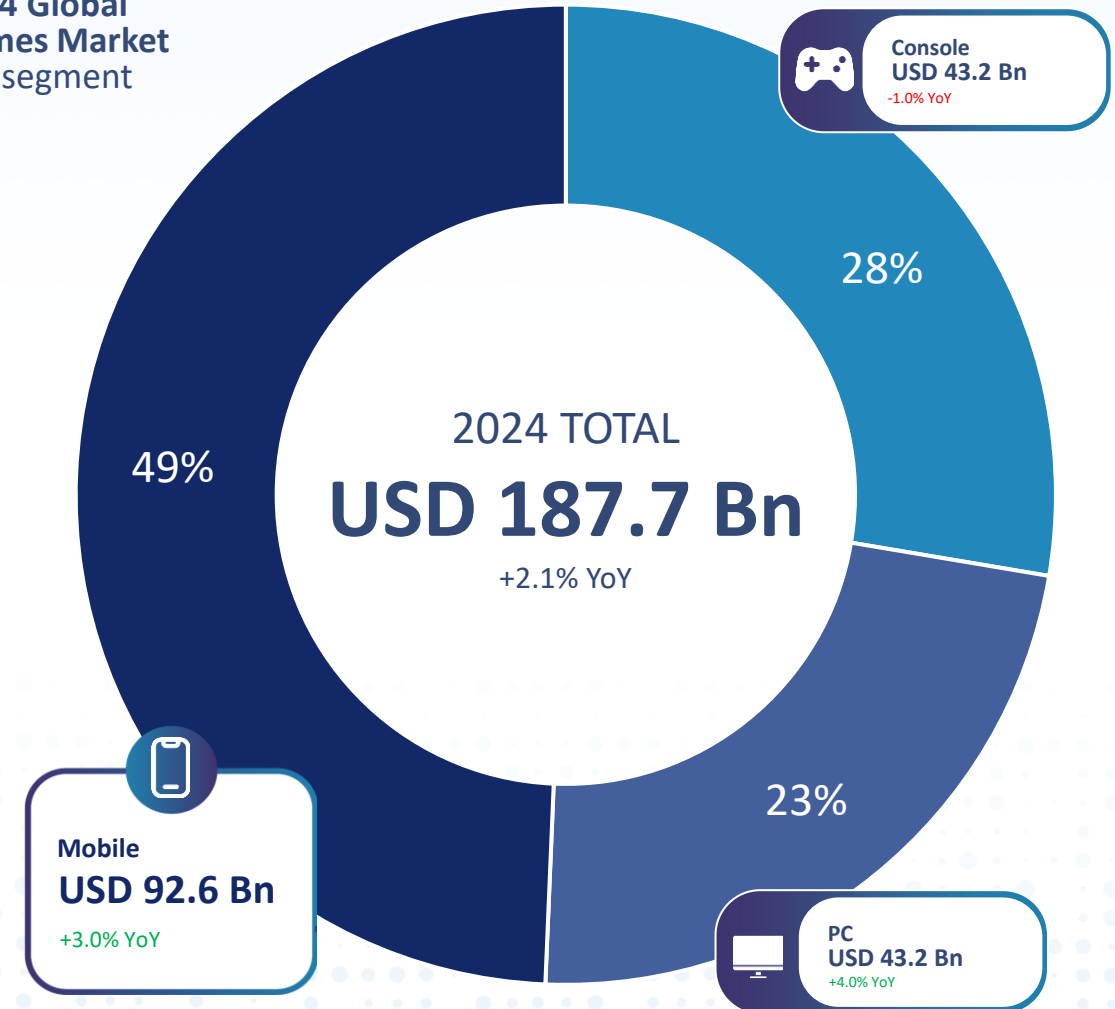
INDONESIAN GAMING MARKET HIGHLIGHT

The Indonesian gaming market has experienced rapid growth in recent years, driven by several key factors:

Mobile Gaming Adoption

Growth is largely fueled by consumer preferences for mobile gaming. The widespread adoption of smartphones and increased mobile internet access have made mobile games an appealing choice for many Indonesians. This segment thrives on convenience and affordability, attracting a broad range of players and driving overall market expansion.

Esports and Competitive Gaming

Esports has emerged as a major force, with professional gaming tournaments attracting large audiences and generating significant revenue. Leading Indonesian teams include ONIC Esports, Rex Regum Qeon (RRQ), EVOS Legends, and Alter Ego. Competitive gaming's popularity is further supported by improved internet infrastructure and a strong interest among Indonesian youth. Popular titles such as Valorant and Mobile Legends have reinforced the demand for interactive and social gaming experiences in the post-COVID-19 era.

Market Size and Government Support

Indonesia's young and sizable population provides a robust consumer base for gaming products and services. The government has actively supported industry development by promoting gaming hubs and offering incentives for game developers and investors, further strengthening the sector's growth trajectory.

2024 FORECASTED MARKET VALUE

USD 3,667 M

MOBILE	: USD 316.8M
CONSOLE	: USD 128.7M
DOWNLOADED GAMES	: USD176.7M

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GAME MONETIZATION

COMMON PRACTICE OF GAMING MONETIZATION

IMAGE SOURCE: DRAGON CITY

01

IN-APP ADS. Mobile ads come in a variety of formats. Playable ads and rewarded videos are especially popular among gaming apps.

IMAGE SOURCE: FREE FIRE

02

IN-APP PURCHASE. Gamers are familiar with the term "top up." Top up includes various in-app purchases that allow users to buy merchandise, cosmetics, exclusive content, or even additional gameplay.

IMAGE SOURCE: GOOGLE PLAY

03
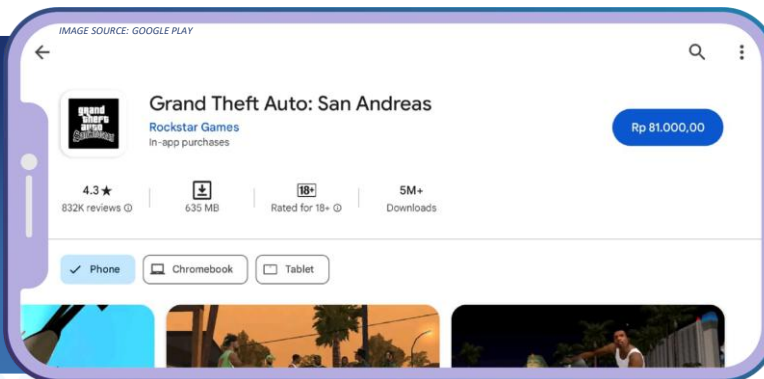
PAID APPS. The simplest monetization model: charge upfront for access. Gamers must pay before playing.

IMAGE SOURCE: HOYOVERSE

04

SUBSCRIPTION SERVICE. Predictable and stable revenue model. Subscription apps offer premium services or functionality, and gamers often view this as the best cost-to-value option a game can provide.

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GAME ENTHUSIASTS

The global gaming population is expected to reach 3.42 billion in 2024, marking a 4.5% year-on-year increase, largely driven by growth in the PC player base. Following a strong lineup of releases in 2023, which included many successful cross-platform titles, the PC player base is projected to grow by 3.9% annually, surpassing 900 million in 2024.

The global gaming population is set to expand across all regions. The Asia-Pacific region, which accounts for 53% of the world's gaming population, is expected to grow by 4.0% year-on-year, reaching 1.8 billion players in 2024, with much of this growth driven by Central and Southeast Asia. Meanwhile, the Middle East and Africa, as well as Latin America—where mobile gaming dominates—will continue to experience the fastest growth, together accounting for 16% and 10% of the global player base, respectively. In comparison, player growth in North America and Europe will be more moderate, at 2.9% and 2.4% year-on-year.

INDONESIA LANDSCAPE

2025 forecasted number of player

192.1 MILLION

Equal to 43% of Southeast Asia gamer

2024 Global Players per region

North America
244M | +2.9% YoY

Latin America
355M | +5.6% YoY

Europe
454M | +2.4% YoY

Middle East & Africa
559M | +8.2% YoY

Asia Pacific
1,809M
+4.0%YoY

7%

11%

13%

16%

53%

2024 TOTAL

3,422 M

+4.5% YoY

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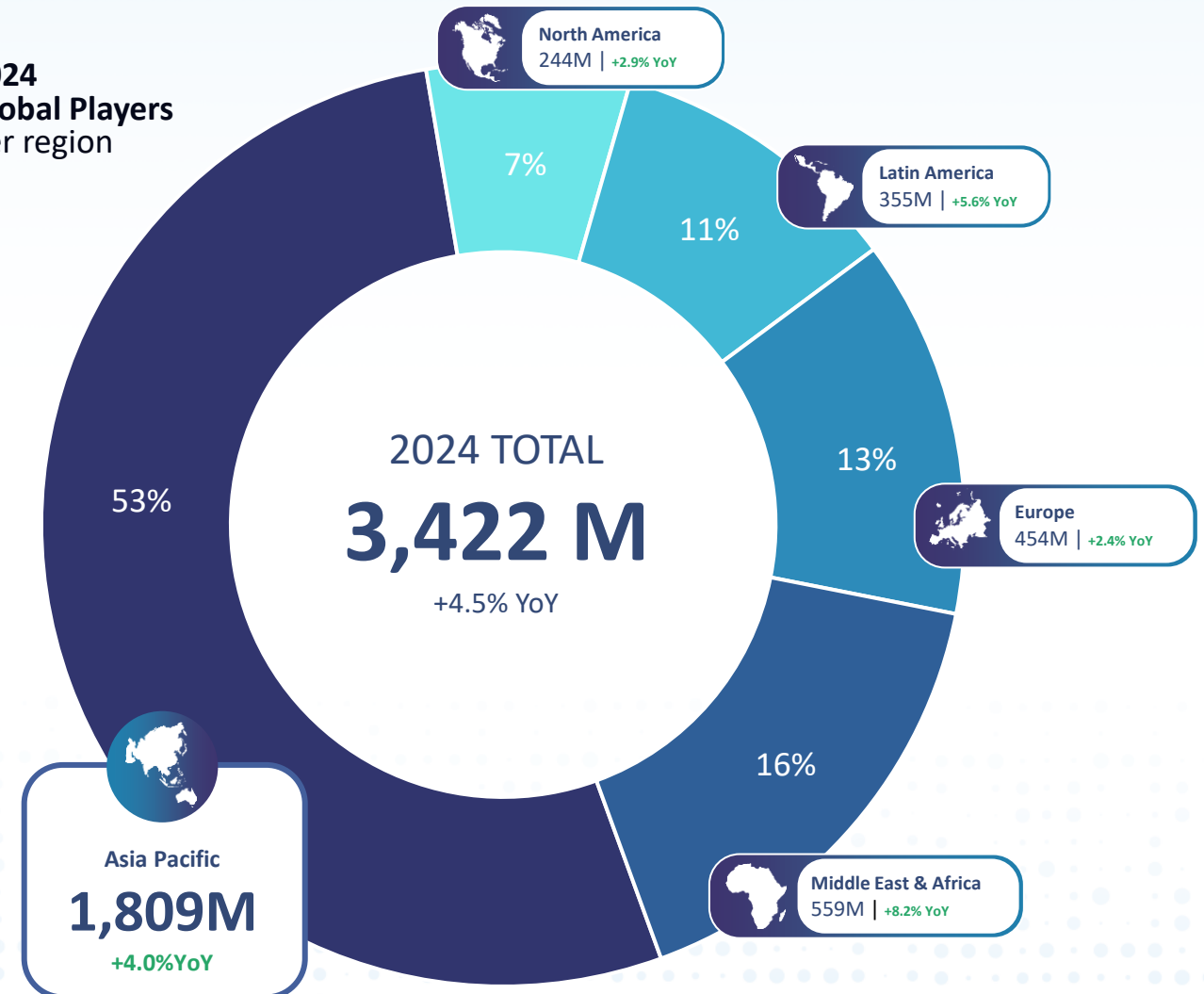
GAME ENTHUSIASTS
ASIA-PACIFIC GAMER HIGHLIGHT

The Asia-Pacific region is the largest gaming market globally, with over half of the world's players residing there. This region boasts 1.73 billion gamers, highlighting its significant influence on the global gaming landscape.

However, despite the region's significant market size, Asia-Pacific's revenues are expected to decline by 0.2% year-on-year in 2023, indicating slower growth compared to the rest of the world. This lag is primarily due to Japan, South Korea, and China weighing down the region's average.

In China, the gaming industry's future is uncertain due to restrictions on minors' gaming time. Even though more games are receiving licenses, the effects of previous freezes and the slow pace of license issuances continue to impact the market.

In Indonesia, player numbers are anticipated to decline in 2024 following the surge in eSports participation in 2022. A total of 578 Indonesian players competed in professional eSports tournaments in 2023, down from 721 in the previous year.

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CREATIVE ECONOMY SUBSECTOR WITH THE HIGHEST GROWTH POTENTIAL IN INDONESIA FOR 2023-2024

Subsector	Percentage
CULINARY	69.05%
FILM, ANIMATION, STUDIO	43.86%
FASHION	40.48%
APPLICATION	33.33%
CRAFT	23.81%
GAME DEVELOPER	16.67%
MUSIC	11.90%
PHOTOGRAPHY	9.52%
PERFORMING ARTS	7.14%

GAME DEVELOPER, PUBLISHER, AND DISTRIBUTORS

The game development sector is among the most promising subsectors of Indonesia's creative economy and is expected to grow rapidly between 2023 and 2024. Ranked sixth among creative economy subsectors, game development accounts for a significant share of 16.67% of the sector.

This growth is driven by a combination of factors, including a large and youthful population, increasing internet penetration, and the growing popularity of mobile gaming.

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GAME DEVELOPER, PUBLISHER, AND DISTRIBUTOR

TOP GLOBAL GAME COMPANIES

This data outlines the top companies ranked by game revenue, based on annual and quarterly financial reports from publicly listed game companies for Q4 2024. Leading the list is Tencent Games, a Chinese video game publisher renowned for its five internal studio groups, which earned USD 24,984.6 million in revenue. Tencent is best known for popular titles such as PUBG Mobile, Arena of Valor, League of Legends, and Honor of Kings.

		Company	Revenues
1.	Tencent 腾讯	Tencent	USD 24,984.6M
2.	Microsoft	Microsoft	USD 14,867.4M
3.	SONY	Sony	USD 14,071.9M
4.	Apple	Apple	USD 11,331.4M
5.	NetEase Games	NetEase	USD 8,229.9M
6.	Google	Google	USD 5,950.9M
7.	Electronic Arts	Electronic Arts	USD 5,464.0M
8.	T2 Take-Two Interactive	Take-Two Interactive	USD 3,711.2M
9.	Nintendo	Nintendo	USD 3,063.4M
10.	Roblox	Roblox	USD 2,613.8 M

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REASON IN RISING REVENUE

Global Launch of Honor of Kings (HOK)

In June 2024, the global release of Honor of Kings (HOK) significantly boosted Tencent's revenues. Unlike the so-called global version, Arena of Valor (AOV), which did not gain momentum between 2015 and 2017, particularly in Indonesia, the latest launch of HOK has been highly successful.

Aggressive Investment with Local Partners

Tencent was reported to have 300 investments in its portfolio as of 2022. This impressive figure reinforces the company's position as a top player in both the online and offline gaming sectors.

Expanding Market to Anime Enthusiasts & Female Games

Tencent has aimed to diversify its portfolio through acquisitions and investments, particularly in companies developing games for female gamers (otome games) and anime-style content. Between 2019 and 2021 alone, Tencent invested in 14 companies specializing in anime-style and female-oriented games. This strategic focus is supported by the fact that, by the end of 2020, China had over 350 million female gamers and 300 million fans of ACGN (Animation, Comics, Games, and Novels).
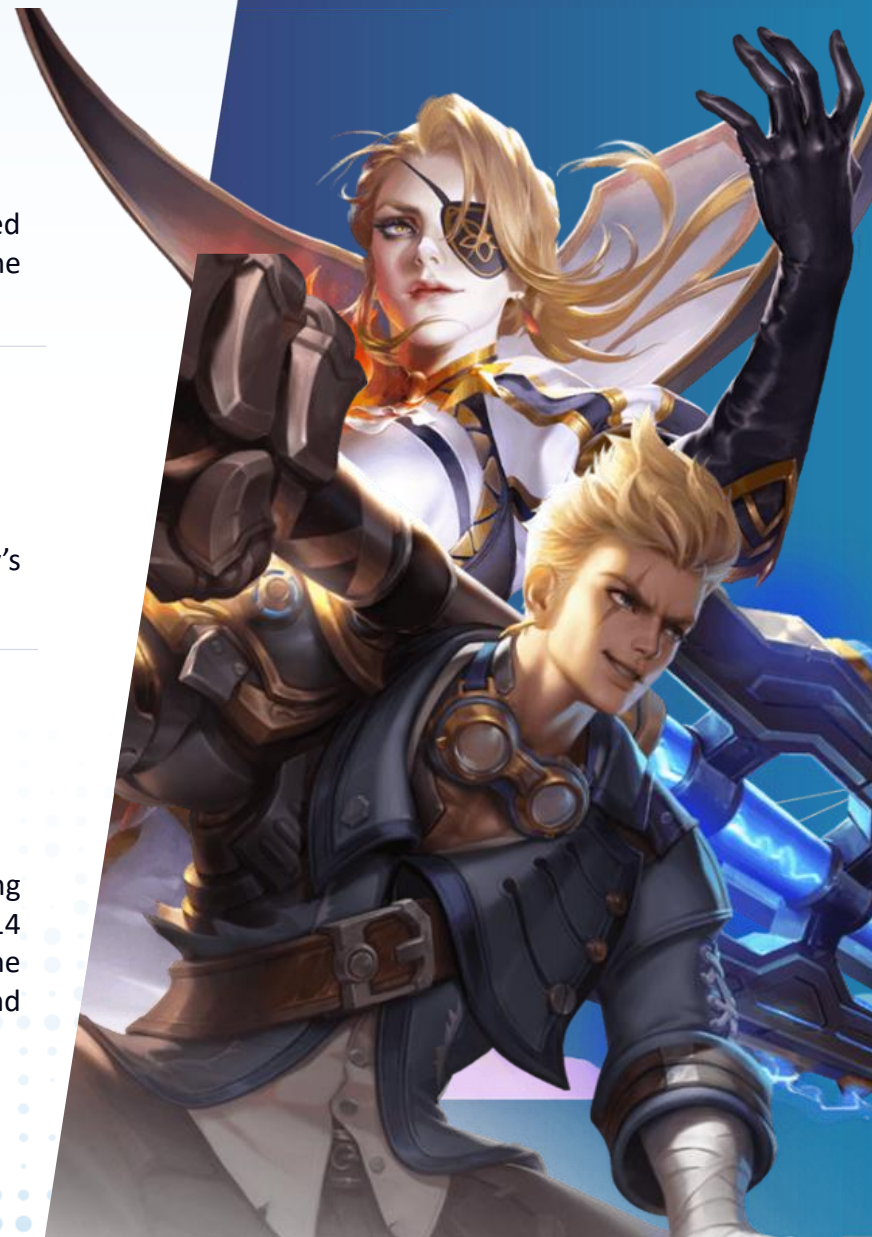
CASE STUDY: TOP 10 MOST DOWNLOADED *OVERALL*

APRIL 2024

	Worms Zone .io - Hungry Snake CASUAL AZUR GAMES	100M-1B
	Lords Mobile: Kingdom Wars IGG.COM	100M-1B
	Melon Sandbox playducky.com	10M-100M
	Wordscapes PeopleFun	10M-100M
	Little Panda Policeman BabyBus	10M-100M
	Kick the Buddy: Second Kick Playgendary Limited	10M-100M
	Genshin Impact COGNOSPHERE PTE. LTD.	10M-100M
	The Baby In Yellow Team Terrible	10M-100M
	Baby Games: Piano & Baby Phone RV AppStudios	10M-100M
	My Cat - Virtual Pet Simulator Appsyoulove	100K-1M

MAY 2024

	Little Panda's Ice Cream Games BabyBus	10M-100M
	Find the Alien MOONEE PUBLISHING LTD	10M-100M
	Town Building Life Simulator XGame Global	10M-100M
	Woodoku - Wood Block Puzzle Tripledot Studios Limited	10M-100M
	Stupid Zombies GameResort	10M-100M
	Crafting and Building GeneRe	10M-100M
	Gangstar New Orleans Gameloft SE	10M-100M
	Free Fire MAX Garena International I	10M-100M
	GT Moto Stunt 3D: Driving Game Zego Studio	10M-100M
	Color Fan - Color By Number Casual World Studio	10M-100M

JUNE 2024

	Roblox Roblox Corporation	10M-100M
	Little Panda's Ice Cream Games BabyBus	10M-100M
	Twerk Race 3d — Fun run game! Freeplay Inc	10M-100M
	Prize Claw Game Circus Studios, LLC	10M-100M
	Honor of Kings Level Infinite	10M-100M
	Squad Busters Supercell	10M-100M
	Granny 3 DVloper	10M-100M
	ASMR Slicing CrazyLabs LTD	10M-100M
	Little Panda's Restaurant BabyBus	10M-100M
	NEW STATE : NEW ERA OF BR KRAFTON, Inc.	10M-100M

Honor of Kings quickly dominated the new game apps market. With its global release on June 20th, it became the 5th most downloaded app in June 2024, surpassing both new and existing games. The global buzz extended to the Indonesian market as well. In June, Honor of Kings claimed the top spot on Google Play's "Top Games" list in Indonesia. However, just a month later, it slipped to #2 (Android), overtaken by Linked Squad's "SCHOOLBOY RUNAWAY - STEALTH" and #6 (Apple).

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GAME DEVELOPER, PUBLISHER, AND DISTRIBUTOR

CASE STUDY: TOP 10 MOST DOWNLOADED *NEW APPS*

APRIL 2024

|		
	Squad Busters Supercell	1M-10M
	Home Hammer: Fix ASMR ABI Games Studio	1M-10M
	Help Monster: Tricky Puzzle Mirai Global Publishing	1M-10M
	Squad La Gilbertona J Froylan	1M-10M
	HypeHype: Play with Friends HypeHype Inc.	1M-10M
	Geng Motor Multiplayer IDBS Studio	1M-10M
	Ragdoll Destroy Break Rag Doll Binge Gamez	1M-10M
	Sandmod: 3D Playzone Miracle Group Studio	1M-10M
	Superhero Bone Smasher Azel Games	1M-10M
	De-Extinct: Jurassic Dinosaurs SeaMo Entertainment	100K-1M

MAY 2024

	Wuthering Waves **HK Kuro Games Limited**	**1M-10M**
	Barber Hair Salon Shop R Edge Games	1M-10M
	Mini Relaxing Game- pop it Stick Hunter	1M-10M
	BangBang Survivor SPGAME	1M-10M
	Zombie Evolution Battle TheSunStudio	1M-10M
	Desert: Dune Bot White Spirit Games	1M-10M
	Mini Puzzle Challenge Stick Hunter	1M-10M
	Offroad Runner BoomBit Games	1M-10M
	Card 2048 Shenzhen Fengqihuixin Network Technology Co., Ltd.	100K-1M
	Save The Eggs: Draw To Save Critical Force Ltd.	100K-1M

JUNE 2024

	Supermarket Store 3D Simulator Playspare	1M-10M
	CookieRun: Tower of Adventures Devsisters Corporation	1M-10M
	Schoolboy Runaway - Stealth Linked Squad	1M-10M
	Delete Story: Brain Puzzle Brames	100K-1M
	BMX Cycle: Bicycle Game Dead Pixel Labs	100K-1M
	Candy Clash Adventure MhmdAwad	100K-1M
	Clothing Store Simulator Zego Studio	100K-1M
	Game Show – Live Quiz Pakistan PlanetBeyond	100K-1M
	City Gas Station Simulator 3D Digital Melody Games	100K-1M
	Tumble Troopers: Shooting Game Critical Force Ltd.	100K-1M

Wuthering Waves had its global release on May 22nd and became the most downloaded new app in May 2024, credits to players who downloaded it on the release date and those who pre-installed it. While Wuthering Wave achieved global acclaim, it didn't quite make waves in Indonesia. In April-June 2024, the game missed the Indonesia top game as its position is #60 (Android) and #23 (Apple) in May 2024. Indonesian gamers found it required higher phone specs than their devices could handle.

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GAME DEVELOPER, PUBLISHER, AND DISTRIBUTOR

LOCAL GAMES HIGHLIGHT

Although the Indonesian market is predominantly mobile-first, the situation differs for locally developed games, which are primarily created for PC and consoles, with some later ported to mobile. Several of these games have achieved global commercial success, demonstrating that the quality of Indonesian game developers continues to improve.

POTION PERMIT by MassHive
Est. unit sold   : 282,100
Est. gross revenue*   : USD 3,900,000

CORAL ISLAND by Stairways Studio
Est. unit sold   : 625,700
Est. gross revenue*   : USD 14,700,000

A SPACE FOR THE UNBOUND by Toge Productions
Est. unit sold   : 66,600
Est. gross revenue*   : USD 895,900
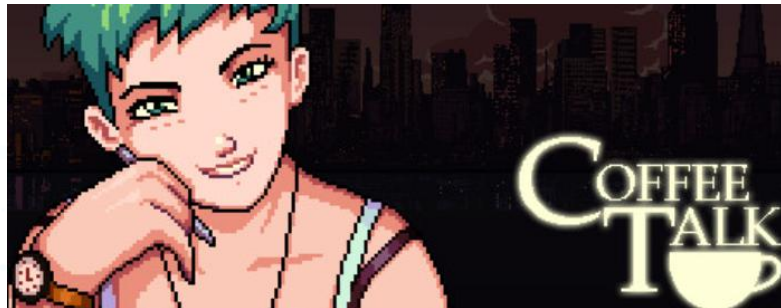
COFFEE TALK by Toge Productions
Est. unit sold   : 371,600
Est. gross revenue** : USD 2,900,000

Several Indonesian-made games, such as *Potion Permit*, *Coral Island*, *A Space for the Unbound*, and *Coffee Talk*, have collectively sold more than 1.3 million copies on Steam. These titles have generated an average gross revenue of USD 22.3 million.

Notably, all of these games were released between 2020 and 2023, reflecting the recent growth of the gaming industry in Indonesia. This underscores that these titles were developed for PC and consoles rather than mobile, highlighting the disparity between local creators' capabilities and prevailing market demand.

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LOCAL GAMES HIGHLIGHT

RIFTSTORM is a co-development project between **Agate** and **Confiction Labs**. It is a multiplayer co-op top-down action looter shooter, where players assume the role of secret operatives within a globe spanning secret organization called the Mythic Protocol. In-game, players can control unique characters known as "Weavers" as they face mythic threats around the world and beyond.

RIFTSTORM has conducted three playtests so far, and it has shown consistent growth across the playtests:
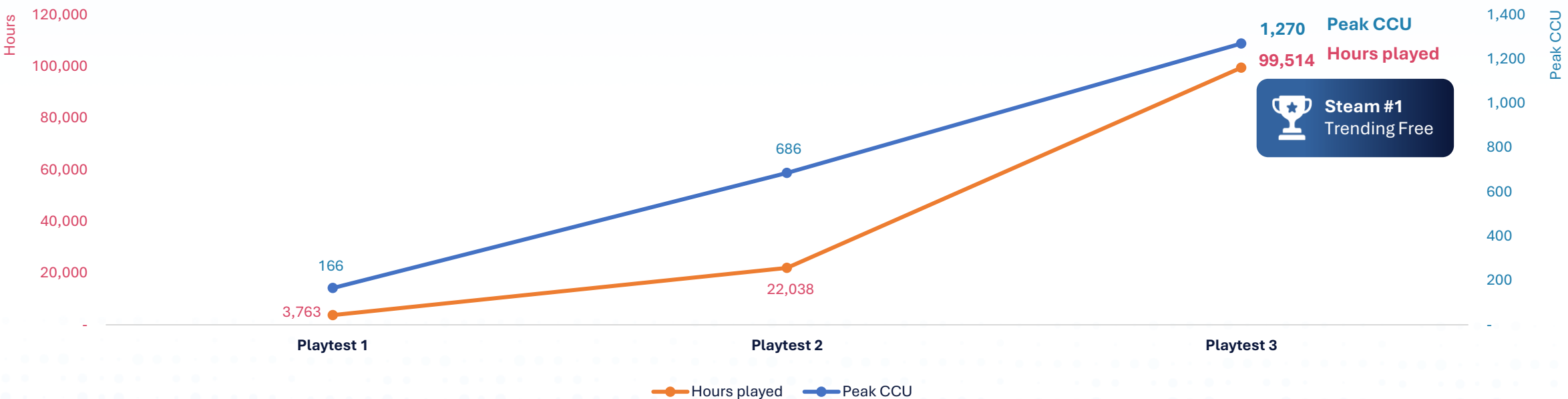
As seen in the chart above, *RIFTSTORM* achieved global success during its third playtest, as evidenced by a peak concurrent user growth of 665% from the first to the third playtest. The third playtest attracted participants from 130 unique countries, with 27% from the Americas, 26% from Europe, 23% from other parts of Asia, and 20% from East Asia. Later in July 2025, RIFTSTORM was listed in the top 50 most-played games out of more than 2,500 featured in Steam Next Fest.

The initial success of *RIFTSTORM* highlights the strong collaboration between both parties, with **Agate**, as a local game developer, demonstrating its ability to build meaningful strategic partnerships, resulting in a game that meets global standards and resonates with players worldwide

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INDONESIAN PLAYER BEHAVIOUR PREFERENCE

Indonesia's gaming scene is booming. With millions of players logging in every day, gaming is no longer just about passing time—it's about finding the right experience. From casual puzzle-solving to conquering kingdoms or competing in esports arenas, Indonesian gamers know exactly what they're looking for. The real question is: what keeps them coming back? From their favorite genres to the triggers that drive in-game spending, we uncover what makes players say "just one more round.

TREND 1

Indonesian gamers prefer free-to-play but are willing to spend when the game delivers real value.

USD 370 M Total money spent in-game

Indonesia is the third largest market for mobile games based on Google Play downloads, with Indonesian mobile gaming users spending USD 0.37 billion (about IDR 5.6 trillion) on in-app purchases, marking a 15.6% increase from 2022. This growth aligns with the rising number of mobile game downloads each year. The expansion is projected to continue in the coming years, with revenue expected to grow by 1.08% in 2024 and the number of mobile gaming users in Indonesia anticipated to reach 68.03 million in the same year.

Monthly gaming spending
In Indonesia

- 10%
- 16%
- 10%
- 17%
- 54%

On average, the monthly video gaming related spending numbers is

IDR 91,362

per video gamer.

- Full game copies (for console, PC, or mobile)
- In-game content
- Essential video game hardware
- Peripheral video gaming hardware
- Video gaming subscription services

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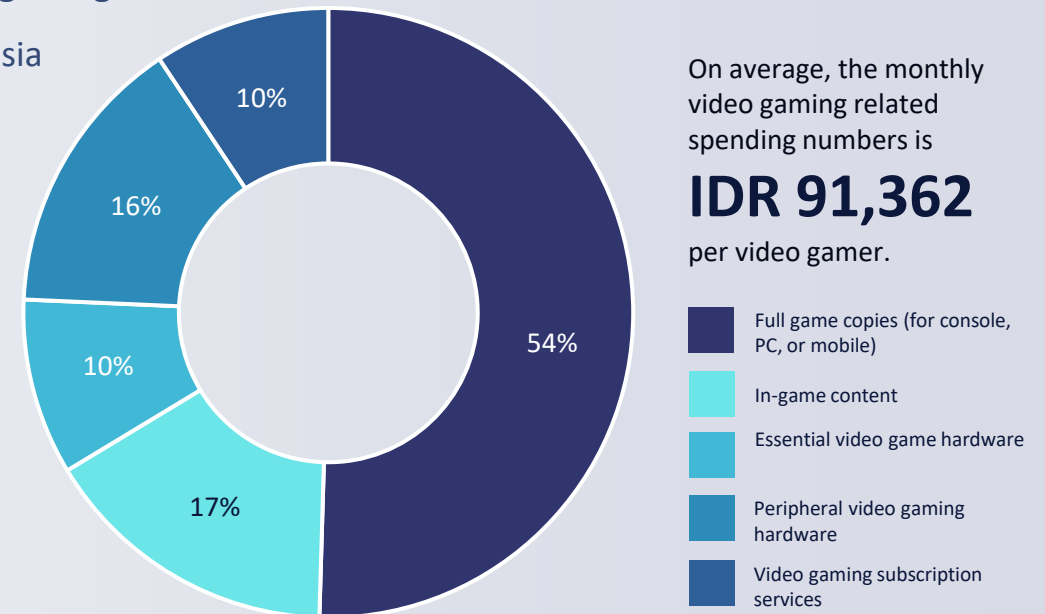
INDONESIAN PLAYER BEHAVIOUR PREFERENCE

TREND 2

Games continue to be perceived as a fun escape from daily life, with hyper-casual being the favorite genre.

Leading Mobile Game Genre in Indonesia
Year 2023, based on total downloads

Genre	Download (million)
HYPER-CASUAL	(image bar)
Simulation	672.5
Kids	359
Action	323.7
Match	183.6
Racing	144.3
Sports	136.9
Puzzle	135

Download in million
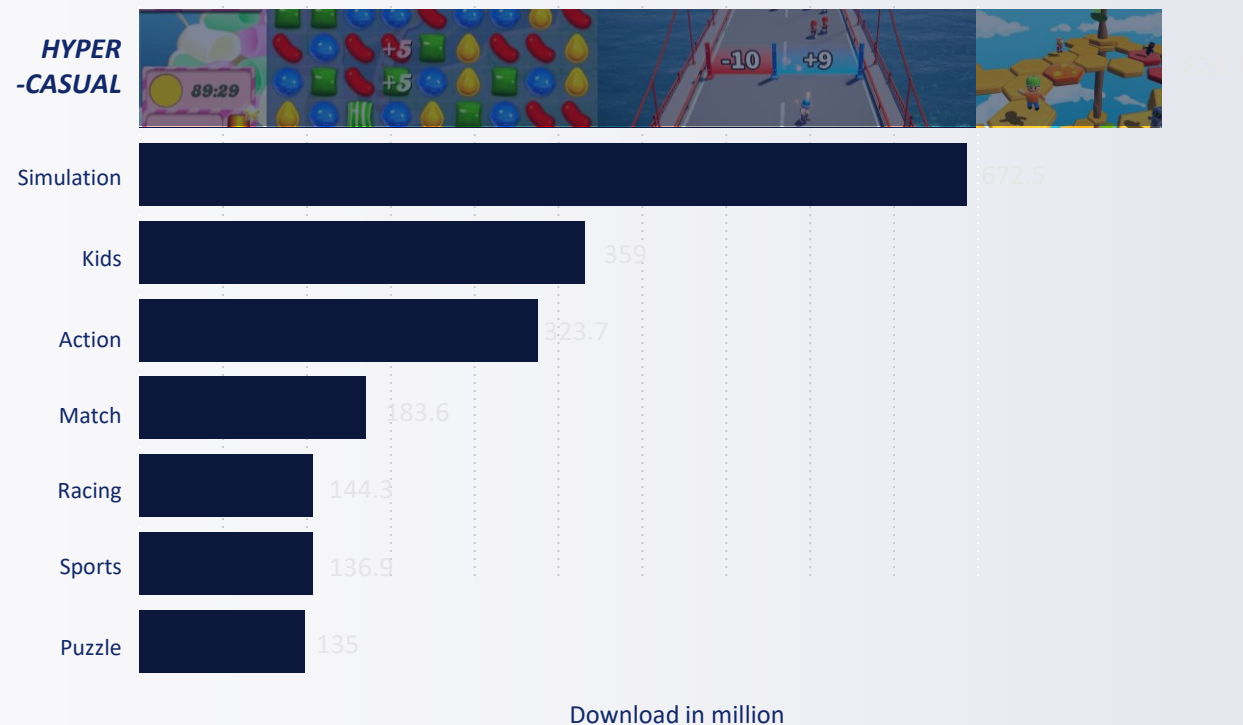
Gaming has continued to be a fun way to escape from daily routines, with mobile gaming taking center stage in 2023. Hyper-casual games stole the show, racking up about 830 million downloads—25% of all mobile game downloads. Their simplicity and quick gameplay make them perfect for Indonesian gamers seeking fun without the fuss.

While action games like Mobile Legends are hugely popular, they did not match the download numbers of hyper-casual games. This trend shows that Indonesian gamers crave convenience and instant fun. Following hyper-casual, simulation games also made waves with around 673 million downloads, appealing to those who enjoy immersive experiences that mimic real life.

Overall, it is about easy enjoyment, with hyper-casual and simulation games leading the charge in Indonesia's mobile gaming scene.

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INDONESIAN PLAYER BEHAVIOUR PREFERENCE

TREND 3

Esports popularity continues to stay relevant among Indonesian gamers and viewers.

While 91% of Indonesians are aware of video games, only 57% actively engage with them commercially. This reveals a notable gap between awareness and participation in the gaming market, suggesting that many potential gamers have yet to enter the world of gaming. Closing this gap could create significant growth opportunities for the industry, as more people transition from awareness to active involvement.

Esports engagement maturity in 2022
% of Indonesian to whom below categories apply

Game awareness	Overall reach	Meaningful reach	Commercial conversion	Regular reach
91%	77%	65	57%	51%
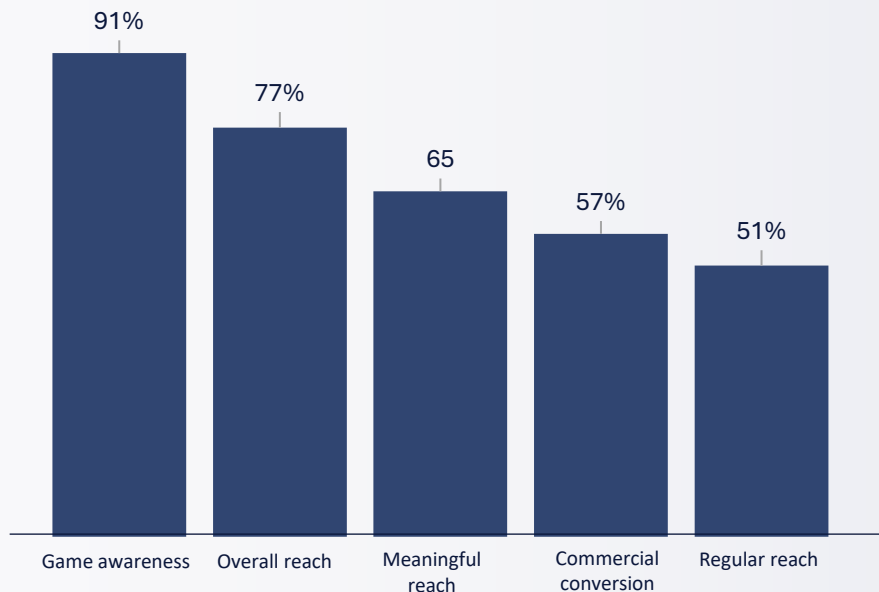
Weekly video gaming consumption times
The percentages indicate the proportion of respondents who have watched professional e-sports competitions at least once during the past six months.

INDONESIA — 50%
11% | 61% | 39%

APAC* — 40%
20% | 41% | 39%

GLOBAL* — 27%
25% | 41% | 34%

■ Watched ≥ 1 hour/day   ■ Watched ≥ 1 hour/week   ■ Watched <1 hour/week
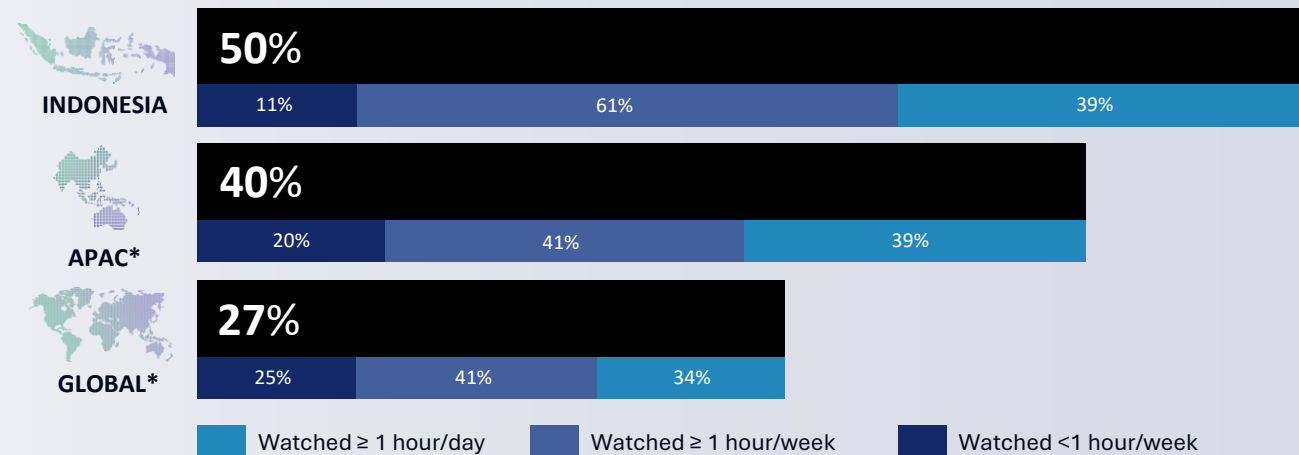
*1) Asia-Pacific (AP) includes data from China, India, Japan, South Korea, Indonesia, Malaysia and Singapore; 2) "Global" refers to all countries included in the consumer survey in "Let's Play, Indonesia! Video gaming & esports 2022" by Deloitte

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INDONESIAN PLAYER BEHAVIOUR PREFERENCE

T R E N D   4

Indonesians are mobile gaming mavericks who live for mobile play.

Mobile gaming continues to be the dominant platform in Indonesia, with its popularity expected to keep rising due to the high smartphone penetration rate of 128% (approximately 353.8 million smartphones, compared to Indonesia's population).

T R E N D   5

The growing appeal of cloud gaming: unlocking high-spec games with *"device kentang"*

Cloud gaming is solidifying its position through strategic smart TV partnerships and highly anticipated applications on the horizon. This has resulted in a projected growth rate of 35.6% (2021–2026), with a forecasted value of $12.49 billion, representing nearly 7% of the total global gaming content market. Major players such as Microsoft Corp. and Tencent Holdings Ltd. are investing heavily in cloud-based content.

Genshin Impact Cloud has been available on the Google Play Store since June 10, 2023, following a trial period launched by HoYoverse in April 2023. HoYoverse acknowledges that the Genshin Impact Cloud platform still has a long way to go and requires further development. Some of its shortcomings include long wait times, reliance on a stable internet connection, and subscription fees. HoYoverse is reportedly addressing these issues to ensure Genshin Impact Cloud can be played more smoothly by everyone. With ongoing improvements, cloud gaming is becoming an increasingly viable solution for playing high-spec open-world and RPG games, offering players greater flexibility and accessibility.

35.6% GROWTH RATE (2021-2026)

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Chapter 3

OPPORTUNITIES AND CHALLENGES

MARKET ENTRY BARRIERS

In the Asia-Pacific region, many publishers tend to focus solely on market powerhouses such as Japan, Korea, and China. This narrow view overlooks broader opportunities available in other countries across the region. While it makes sense to prioritize these major markets due to their strong spending power and established gaming ecosystems, it is important to remember that the Asia-Pacific region encompasses far greater diversity in terms of gamers and game development talent. There is significant potential to be discovered beyond these three giants, with numerous studios and gamers contributing to a vibrant gaming landscape in the region.

However, tapping into the broader APAC region requires navigating a range of complexities, including diverse cultural nuances, varied spending habits, language barriers, and differing regulatory frameworks across countries. Indonesia, in particular, offers significant promise with its rapidly growing gaming market. According to Agate, the business outlook for Indonesia's gaming industry appears highly favorable, driven by a substantial gamer base of 174.1 million and a projected CAGR of 7.32% (2024–2027), according to Statista. This positions Indonesia as a compelling opportunity for global publishers willing to explore beyond the usual markets.

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MARKET ENTRY BARRIERS

CHALLENGE FOR GLOBAL GAME DEVELOPERS IN INDONESIAN MARKET

Compared with established gaming markets such as the US and Japan, Indonesia is still in a dynamic growth phase, offering attractive opportunities for regional and global players such as Level Infinite to connect with new audiences and build lasting relationships. The growing number of local game developers achieving success, both domestically and internationally, is further evidence of Indonesia's expanding gaming industry, highlighting the country's strong creative potential. While the Indonesian market is promising, it also presents unique challenges for global developers seeking to enter it. Key challenges include:

CULTURAL UNDERSTANDING
Games that perform well in global markets might not resonate with Indonesian players due to differing cultures and preferences. Developers need to invest in research and tailor their content to ensure relevance and appeal to local audiences.

PLAYERS' PREFERENCES
Indonesian gamers often have distinct gameplay and feature preferences compared with those in other regions. It is essential to understand these differences and design game mechanics accordingly to achieve success.

REGULATORY ENVIRONMENT
The regulatory landscape in Indonesia can be complex and is subject to frequent changes. Developers must stay informed and ensure compliance to avoid legal issues.

COMPETITION
The market is already highly competitive, with many strong local and global titles competing for players' attention. Developers need to offer a unique selling proposition (USP) and create gaming experiences that stand out.

Securing funding and attracting investors have always been significant challenges for game developers, particularly in an increasingly competitive industry where innovative projects require substantial financial backing. In this context, miHoYo, the company behind the popular game Genshin Impact, recently rebranded as HoYoverse, focusing on expanding its reach and serving users beyond the Chinese market. Beyond the name change, HoYoverse has also committed to developing the latest technology to enhance its ability to deliver top-quality gaming experiences and optimize service quality. One of the most noticeable changes for players is the transition of the official website from genshin.mihoyo.com to genshin.hoyoverse.com. Although this change is significant, HoYoverse did not announce it widely, leading to confusion within the community during the login process.

"Our mission in forming HoYoverse is to create a vast virtual world that combines games, anime, and other forms of entertainment, giving players a high level of freedom. We will continue to focus on long-term operational strategies and innovate in various fields, including artificial intelligence, cloud computing, and pipeline construction, to ensure that the content we create meets the expectations of players worldwide."

– **Haoyu Cai**, Co-founder and CEO of HoYoverse

This change is likely a way for HoYoverse to manage in-game purchases more effectively. With its new headquarters in Singapore, HoYoverse and its publishing arm Cognosphere can circumvent some restrictions imposed by certain countries. China has been facing strained international relations that have hindered profits from flowing into the country and led to stricter regulations on its products. In contrast, Singapore does not have the same constraints. Tencent, for example, has utilized its Singapore office to navigate the ban on its games in India.

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MARKET ENTRY BARRIERS

CASE STUDY: HONOR OF KINGS IN INDONESIA

Despite the challenges, there is no doubt that the Indonesian gaming market holds significant potential. Agung Chaniago, Country Head of Level Infinite Indonesia—a new publishing division of Tencent known for the game Honor of Kings—outlined the key factors that influenced their decision to enter the Indonesian market:

RAPID MARKET GROWTH

Indonesia has been one of the fastest-growing gaming markets in Southeast Asia in recent years. The combination of increased internet penetration and a growing middle class makes it an attractive market for global companies such as Level Infinite.

LARGE AND YOUNG POPULATION

Indonesia has a large population of over 275 million people, with more than 60% younger than 35. This young population is highly engaged in gaming and esports, presenting a vibrant and expanding audience for our games.

MOBILE-FIRST AUDIENCE

Indonesia's predominantly mobile-first market is a major advantage for Level Infinite, with over 70% of the population using mobile devices for entertainment, including gaming. Since 60–70% of gaming activity in Indonesia takes place on mobile devices, this aligns with our strategy to focus on mobile-first games that resonate with local players.

ESPORTS POPULARITY

Indonesia is a rising star in the global esports scene, with its audience projected to reach 53.3 million by the end of 2023. Indonesia's strong esports culture offers a significant opportunity for Level Infinite to engage with the community through competitive gaming events and tournaments.

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MARKET ENTRY BARRIERS

CHALLENGE FOR LOCAL GAME DEVELOPERS IN INTERNATIONAL MARKET

The Indonesian gaming industry is at a critical turning point. There is a need to balance the rich cultural heritage of local developers with the challenges of competing in the global market. Despite facing significant obstacles such as funding constraints and complex regulations, there are still many opportunities for growth. Strategic partnerships with established publishers can help local studios gain recognition and reach more players.

Limited access to funding

Despite the rapid growth of the gaming industry in Indonesia, local developers continue to struggle with limited access to funding and technological resources. This hinders their capacity to produce high-quality games that can compete internationally. The government has recently introduced regulations such as Peraturan Presiden No. 19/2024, aimed at addressing this by providing financial support and development programs. However, the full impact has yet to be seen.

Difficulties in adapting to international standards

Many local game developers struggle to meet the production standards expected in international markets. These challenges include quality assurance, technical skills, and access to advanced development tools. As a result, local games often lack the polish needed to compete with major global titles.

Navigating a complex regulatory environment

Regulations in Indonesia are complex and frequently changing, making it difficult for developers to remain compliant while focusing on innovation. Developers need to navigate both domestic regulations and foreign market requirements, which can be demanding for smaller studios with limited resources.

Competitive market and audience preferences

The Indonesian gaming market is dominated by international titles, which significantly shape the preferences of local gamers. As a result, it is challenging for local games to gain visibility and traction within their own market, let alone internationally. Local developers need to create content that resonates with local culture while also appealing to wider audiences, striking a balance between cultural relevance and global appeal.

Insufficient network and market penetration strategy

To enter the global market, local developers must build strategic partnerships with international publishers and platforms. However, many local studios struggle to establish these partnerships and fully utilize distribution channels due to limited industry connections and insufficient market intelligence.

Talent gap and skill development

Although Indonesia has a growing pool of talent, there remains a gap in technical expertise and experience, particularly in areas such as game design, programming, and project management. Local studios often struggle to attract and retain skilled professionals capable of meeting the demands of high-quality game production.

Cultural and content adaptation

To succeed in international markets, developers must have a solid understanding of cultural differences and player preferences in their target regions. Local developers need to invest in localization to adapt their games to the culture of each area, making them appealing to diverse audiences. However, the process can be both costly and complex.

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MARKET ENTRY BARRIERS

COLLABORATION WITH LOCALS

Compared with the established gaming markets of the US and Japan, Indonesia is in a dynamic growth phase, offering attractive opportunities for regional and global players such as Level Infinite to connect with new audiences and build lasting relationships. The growing number of local game developers achieving success—both domestically and internationally—is further evidence of Indonesia's expanding games industry and the country's strong creative potential.

Global publisher and distributor

With the rapid expansion of the global gaming market, many developers are looking to explore international markets to tap into broader growth opportunities. This shift has led to a surge in discussion of publishing-as-a-service models. Global publishers and distributors play a crucial role by assisting developers in promoting and distributing their games in foreign markets, leveraging deep knowledge of local markets, well-established networks, and a deep understanding of cultural nuances and regulatory requirements.

Agate is actively establishing strategic collaborations with global developers and publishers to enhance the competitiveness of local games. For example, it has partnered with overseas publishers for the global distribution of Agate's Valthirian Arc: Hero School Story 2.

Joint marketing and promotion

To break into new markets, game developers pay close attention to understanding the market and selecting effective promotional channels. Local knowledge from overseas publishing agencies—and the publishing-as-a-service model—can help identify the most effective tactics.

Game roadshows

Bringing the community to multiple locations to create a stronger connection with players—for example, Level Infinite used the "Pejuang Nusantara" campaign to promote HOK in Indonesia.

Rewards and in-game exclusive content

Tailored content for Indonesian gamers, including localized events, costumes, and items released around national festivals.

Twin date promotions

Offering special deals on local payment channels.

Partnership with local IPs

Publishers are always seeking new ways to expand the reach of their live-service games. Collaborating with brands and IPs is a proven strategy to excite audiences and boost sales. Games are emerging as a key entertainment platform for showcasing brands and franchises. Brand and IP collaborations increase engagement: Daily Active Users (DAU) increase by 11% within the first seven days after a collaboration launches, rising to 19% for premium games.

Game IP × other brand

Game makers frequently leverage IP-and-brand collaboration events, such as Genshin Impact's collaboration with local brands in Indonesia—especially common among PC and console publishers.

Game IP × Game IP

One of the most common collaboration types is between game IPs. Of the 477 collaborations we analyzed, 158 originated from another game IP.

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MARKET ENTRY BARRIERS

COLLABORATION WITH GOVERNMENT PARTNERS AND ORGANIZATIONS

"**Level Infinite maintains regular communication with Indonesian government authorities through industry associations, direct meetings, and participation in local forums.** We also support the local game industry by sponsoring Gameseed through collaboration with Economic Creative & Tourism Ministry. We engage with key stakeholders in the Ministry of Communication and Information (Kominfo) and other regulatory bodies to stay updated on the evolving regulations and ensure compliance. By being part of the dialogues surrounding policy-making and regulatory development, we aim to contribute positively to the gaming ecosystem in Indonesia."

Agung Chaniago
Country Head of
Level Infinite Indonesia

Shieny Aprilia
Co-Founder and
CEO of Agate

"**With supportive regulations in place, we are optimistic that local developers can innovate more easily, improve their capabilities along with the quality of games, and compete in the global market.** We also see the role of the government in facilitating collaboration between industry players, academia, and the government itself as an important step to encourage sustainable growth in the local gaming sector."

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PATH FOR EXPLORATION

The Indonesian gaming industry offers huge untapped potential for both global and local publishers. It is a fast-growing market in Southeast Asia with a distinctive blend of gamer preferences and digital culture, much of which remains largely uncharted. Indonesia's young, highly engaged population has a clear need: localized content and strategies tailored to this audience. Deeper exploration of Indonesia's gaming habits and cultural nuances will be essential to unlocking sustainable growth. By aligning with local trends and fostering partnerships, publishers can capitalize on opportunities in this vibrant industry.

PATH FOR EXPLORATION

ESPORTS FUTURE IN INDONESIA

Indonesian gamers favor VR and mobile esports thanks to affordable devices and widespread smartphone use. The market is expanding with more mobile gamers, more tournaments, and rising investor interest, strengthening Indonesia's role on the global esports map. The tech-savvy youth, along with solid infrastructure, are boosting growth, while government support and economic shifts make it an even more promising market.

MOONTON Games has contributed to Indonesia's gaming and digital industries since it launched the popular mobile MOBA game Mobile Legends: Bang Bang (MLBB). The company has taken on new roles to help bridge the digital divide in rural areas—enabling more people to benefit from the booming digital economy and creating opportunities for young esports athletes to shine. As part of this effort, MOONTON Games teamed up with Garudaku Academy, under the MOONTON Games Program, to launch Fostering the Legends.

"There are hundreds of students from seven schools in East Java, who will be beneficiaries under the MOONTON Cares and Garudaku Akademi joint program. We will facilitate the academy's esports training program which includes a variety of programs for students interested in entering the esports industry. Not just as an esports athlete, other opportunities are referees, casters, managers, even influencers or content creators," stated Azwin Nugraha, Public Relations & Communications Manager of MOONTON Games Indonesia during the memorandum of understanding (MoU) signing between MOONTON Games and Garudaku Academy in Malang, East Java. (6)

NOTABLE ESPORTS TOURNAMENTS. Indonesia hosts many major esports tournaments, with more on the way. One notable example is the 2022 PUBG Mobile Global Championship, which offered a prize pool of USD 4 million and featured 48 teams from around the world. The Grand Final was held at Jakarta International Expo (JIEXPO) before thousands of spectators. In 2023, Jakarta hosted the Mobile Legends: M4 World Championship, with a prize pool of USD 800,000; sixteen teams competed over more than two weeks. In July 2023, Bali hosted a Dota 2 Major with 18 teams competing

**2024 FORECASTED
ESPORTS MARKET INDONESIA**

USD 11.1 M

Expected to show on annual growth rate **(CAGR) of 5.53%** from 2024 to 2029, resulting in a projected market value of USD 14.5 million by 2029.

Seeing how promising the esports market is in Indonesia, going pro has become a real dream for Indonesian gamers.

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PATH FOR EXPLORATION

BATTLE ROYALE — THE DOMINATING ESPORTS GENRE IN INDONESIA

Battle Royale is the esports genre with the greatest reach among esports fans and players in Indonesia, even when compared with other countries in the Asia-Pacific region. Following closely are the MOBA and FPS genres, indicating diverse audience preferences. Among non-gamers, MOBA trails slightly behind Battle Royale; however, the gap between the two is much wider among active gamers.

RELATIVE AND OVERALL REACH OF SELECTED ESPORTS & GAMING GENRE*

Some video gaming genres do not have a relevant esport scene and therefore have an esport reach of 0%.
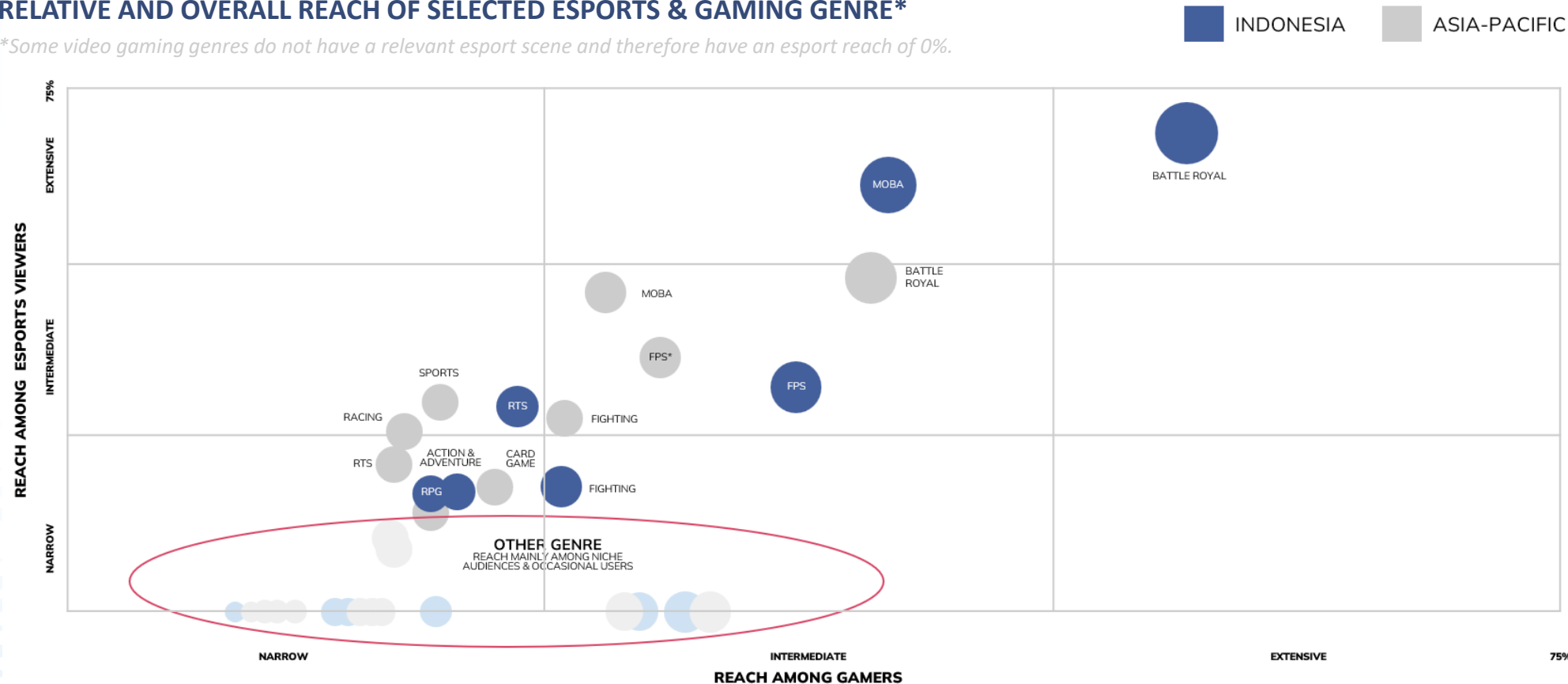
FPS: first-person shooter | RTS: real time strategy | MOBA: Multiplayer online battle arena

PATH FOR EXPLORATION
COMMUNITY CULTURE

The Indonesian gaming scene is deeply rooted in a lively, ever-growing community where creativity and collaboration take center stage. Driven by passionate developers, artists, and gamers, the industry has formed an exciting space where homegrown talent meets global trends. This strong community spirit not only sparks innovation but also creates a supportive environment for emerging creators to thrive.

Indonesia's gaming community is highly social, using virtual platforms as a new interaction hub for gamers. The country also ranks among the top for consumption of gaming-related media, with 65% of gamers watching gaming streams and 22% live-streaming their own gameplay. Despite this, many still view gaming as a personal escape from daily routines: 70% prefer single-player modes, 55% play with online friends, and 35% play with local friends. For game developers, tapping into this social behavior through game design and promotional strategies is key. Designing features that encourage in-game social interactions, together with influencer collaborations and community-driven campaigns, can help brands resonate more deeply with Indonesian gamers, driving higher engagement and building brand loyalty.

70%	**PLAYED SINGLE-PLAYER MODE**
65%	**WATCHED GAMING STREAMS**
55%	**PLAYED ONLINE WITH FRIENDS**
35%	**PLAYED LOCALLY WITH FRIENDS**
25%	**BOUGHT A PRODUCT THEY FIRST SAW IN A GAMING STREAM**
25%	**BOUGHT A PRODUCT THEY FIRST SAW WHILE PLAYING**
24%	**USED A SERVICE THEY FIRST SAW IN A GAMING STREAM**
22%	**LIVE-STREAMED THEIR OWN GAMEPLAY**
19%	**USED A SERVICE THEY FIRST SAW WHILE PLAYING**

■ PLAYING BEHAVIOUR   ■ VIDEO GAME STREAMING   ■ PURCHASE DRIVEN BY VIDEO GAMING

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PATH FOR EXPLORATION
LOCALIZATION

Successfully entering the Indonesian gaming market goes beyond translation; it is about effective localization. This means not only adapting the language but also tailoring content to align with cultural preferences, regulatory frameworks, and the distinct traits of the local audience. Indonesia's diverse gaming community values experiences that feel close to home, resonating with language, culture, and societal norms.

Language adaptation

Language plays a significant role in capturing the interest of Indonesian gamers. While English is widely understood among urban audiences, incorporating the Indonesian language can enhance accessibility and appeal—particularly in casual games where players seek simplicity and humor. A notable example is Genshin Impact, where character-dialogue subtitles are localized using everyday, informal expressions. This localization includes onomatopoeic sound effects such as "JEDUK!" and "BUAKKHI!" that align with the local context.

Cultural preference

Integrating elements that resonate with local tastes and cultural nuances can significantly boost player engagement and foster brand loyalty. Moonton, the developer behind the global hit Mobile Legends: Bang Bang (MLBB), exemplified this with its successful localization strategy by introducing Gatotkaca, a character derived from the country's wayang stories. This thoughtful cultural adaptation not only made the game more relatable but also strengthened its position in the market.

Adherence to local regulations

A key aspect of effective localization is understanding local regulations. Indonesia enforces strict content policies, especially concerning sensitive themes such as sexuality, alcohol, and gambling. Failure to comply can jeopardize a game's acceptance and market access. An example is the adaptation of Mario Kart Tour by Nintendo Co., in which a scene showing characters celebrating with champagne had to be modified for the Indonesian market due to restrictions on alcohol-related imagery.

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PATH FOR EXPLORATION

GAME FOR GIRL

The vice chair of the MLBB Women's Invitational 2023 organizing committee, Ginta Kamka, said that the esports industry's growing reach is increasingly visible, particularly through potential cross-industry collaborations, including with beauty brands.

"The growth of female gamers, especially in Asia, continues to increase year by year, currently reaching 38 percent of the total 1.33 billion gamer population in Asia. In Indonesia, female esports teams have also started to become popular, which in turn influences the esports business ecosystem itself," she stated to Bisnis during the MLBB (Mobile Legends: Bang Bang Women's Invitational 2023 #HEReTOPROVE Press Conference.

The Indonesian gaming landscape is seeing rising interest among female gamers, with 54% of women engaging in esports content and 54% engaging with video-game content. One popular genre is otome games, which are story-driven titles aimed at a female audience. Their success can be attributed to three main factors:

Captivating storytelling: Engages players with intricate plots, unexpected twists, and strong emotional arcs.

Empowering female protagonists: Offers players the opportunity to embody strong, independent characters.

Romantic escapism: Provides a virtual space for exploring romantic fantasies and building emotional connections (10).

Gamer gender distribution
Year 2023

54% 46%
54% 46%
55% 45%
<1%
<1%
<1%

Esports viewers (Outer circle)
Video gamers (Center circle)
Overall sample (Inner circle)

■ MALE   ■ FEMALE   ■ OTHER

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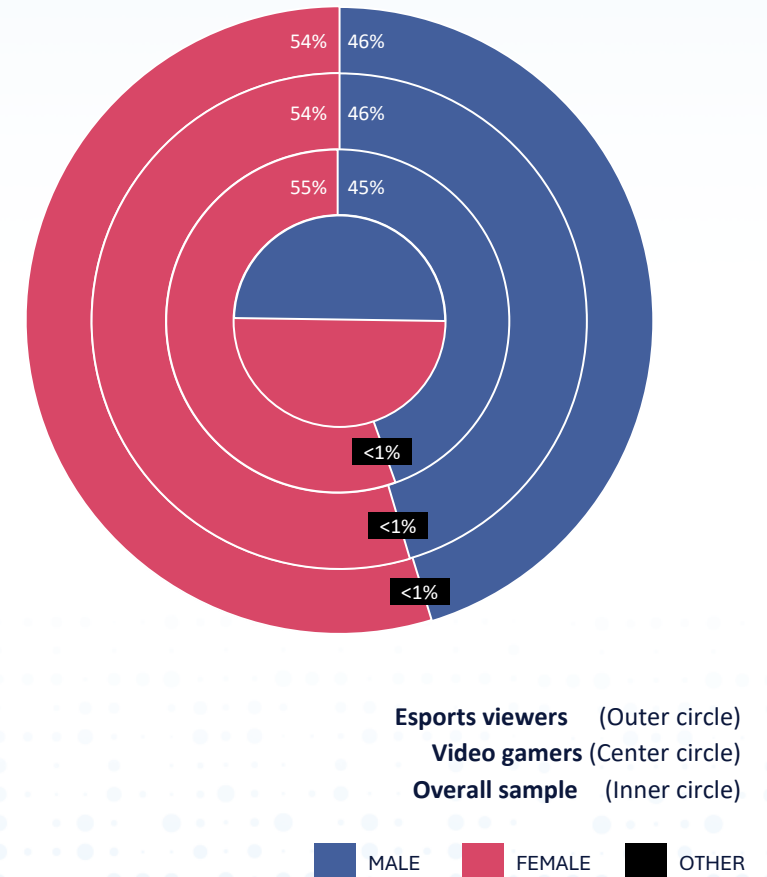
PATH FOR EXPLORATION

GAME FOR GIRL

Female gamers worldwide are drawn to intense, hardcore mobile games that offer strategic gameplay and a variety of characters. They particularly enjoy genres like Massively Multiplayer Online Role-Playing Games (MMORPGs), Anime, Comics, and Games (ACGs), as well as Multiplayer Online Battle Arenas (MOBAs) and shooter games. This growing interest creates a big opportunity for brands to tap into the female audience by crafting content and marketing strategies that align with their preferences and gaming habits. Marketers can draw inspiration from successful titles like Onmyoji, Miracle Nikki, and Jianxiaqingquan, which each boast at least 50% female user bases. (11)

Additionally, even games like Genshin Impact which are not specifically aimed at women manage to attract them by featuring character archetypes commonly found in otome games, such as "ikkemen"—handsome male characters with soft personalities. Notable examples include Kamisato Ayato, Zhongli, Kaeya, and Thoma.

To appeal to female gamers, game design and mechanics should focus on delivering strong strategy elements that challenge and keep players deeply engaged. Using visually stunning, traditional art styles can tap into the aesthetic preferences of female players, while rich storytelling and diverse characters help build emotional connections and offer fresh perspectives. By focusing on these aspects, marketers can create games that not only draw in female players but also keep them engaged and loyal for the long run.

Female gamers' favorite mobile genres
Year 2023

MOBA
PUZZLE
BATTLE ROYALE
SHOOTER
RPG
RACING
STRATEGY/SLG
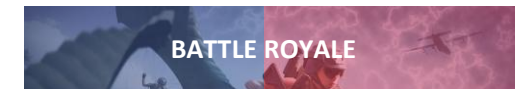
20% 16% 12% 8% 4% 0 4% 8% 12% 16% 20%

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PATH FOR EXPLORATION

GAME SUBCULTURE

In 1993, the live-action film adaptation of "Super Mario Bros." hit theaters, but it received such poor reviews that Nintendo decided to stop licensing adaptations of its games. Fast forward 30 years, and "The Super Mario Bros. Movie" has soared to become the highest-grossing video game adaptation ever. Today, video games are part of the mainstream entertainment scene, drawing in a diverse crowd, including casual fans who might not usually engage with gaming but are hooked to other forms of media. Movie adaptations have emerged as a prominent aspect of this trend.

Over the past decade, the way we view gaming adaptations has significantly flipped, from being seen as poorly made cash grabs into critically acclaimed works that even non-gamers can enjoy. This change raises a question: what are the factors behind this transformation?

String of successes on the big and small screens

A trend driven by Gen Z

Coming full circle

Hollywood's next big thing

Video game adaptations, whether live-action or animated, are experiencing remarkable success across various platforms. "The Super Mario Bros. Movie" secured its spot as the second highest-grossing film of 2023, just behind "Barbie." On the television front, "The Last of Us" garnered widespread acclaim, winning eight Emmy Awards in 2024.

A recent survey indicated that 50% of Gen Z adults in the U.S. expressed a strong interest in video game movie adaptations, making them the biggest fans compared to any other demographic. This trend likely comes from the improving quality of these adaptations, and the increasing acceptance of gaming as a legit hobby and art form.

Brand recognition drives the success of adaptations while introducing new stories and characters to wider audiences, including non-gamers. A prime example of this is the *Fallout* series' Prime debut in April 2024 reignited interest in the franchise, pushing *Fallout 4* to its highest Steam player peak in a decade and boosting Twitch viewership.

With box office revenues declining and superhero fatigue setting in, Hollywood is turning to video game adaptations. Studios are rushing to acquire game rights, aiming for big-screen success. Recently, Sony announced a live-action *Legend of Zelda*, signaling Nintendo's renewed confidence in adaptations.

Top grossing movie and TV adaptation from game

The Super Mario Bros Movie
USD 1.361 B

Detective Pikachu
USD 450.1 M

Warcraft
USD 439 M

Rampage
USD 428 M

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PATH FOR EXPLORATION
BRAND GAMIFICATION

Gamers, including those in Indonesia, love to dive deeply into the fictional worlds of their favorite games, driven by a desire to conquer the next challenge. As gaming culture continues to evolve, Indonesian consumers are are now seeking the same thrills and engagement from brands. While it might sound a bit ambitious, this excitement is achievable through gamification in marketing. Gamification is all about adding a touch of fun and competition to your marketing strategies, turning customers into active players in your brand's story and making everyday interactions into unforgettable. Whether it's a one-time event or an ongoing campaign, gamification can be a powerful way-in to showcase your brand's unique assets and make a lasting impression.

Benefits of Gamification for business through marketing:

Increasing engagement
Gamification captures the attention of potential customers and keeping them hooked by making marketing campaigns more interactive, fun, and enjoyable.

Enhancing brand awareness
Interactive and engaging gamified experiences can create buzz among audiences. By leveraging word-of-mouth marketing, your brand's reach can significantly expand.

Boosting customer loyalty
Gamification platforms can provide customers with direct feedback, allowing them to track their progress and make informed decisions.

Identifying consumer behavior
Gamification can provide valuable data about customer behavior and preferences, enabling you to adjust marketing strategies more effectively.

Gamification isn't a one-size-fits-all concept it's more like a playground with endless possibilities. Different researchers have their own unique takes on it, which means there's still plenty of uncharted territory to explore. In marketing companies are starting to use gamification to level up their strategies and keep customers engaged.

Here are several samples by **Level Up powered by Agate**:

Case Study of Gopay
Suwit's main objective was to increase the engagement and transaction volumes of P2P on the GoPay platform. They wanted to use gamification to incentivize users, making it fun for people to do P2P transfers and encourage them to do it more often.

RESULT:
- **40%** Average increase in P2P transfers
- **Increase in user engagement** on the first day

Case study of Richeese Factory
Fun Cooking With Richeese aimed to boost user retention and sales through mobile game integration, extending the fun of Richeese Factory's Activity Book campaign to attract and engage users while promoting their products

RESULT:
The game achieved a monthly average of 2,000 sales prior to the launch of the game. After the game's introduction, this number skyrocketed to 40,000 units.

Case Study of AXA Experience Zone
The main goal of "AXA City Defender" was revamping communication strategies to connect with a younger, digitally engaged audience. They wanted to raise awareness on life risks and the importance of life insurance by creating an immersive experience that sparks interest.

RESULT:
It effectively communicated the importance of protecting oneself and loved ones through insurance, generating positive word-of-mouth and social media buzz for the brand.

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CRAFTING GROUNDBREAKING GAMES

Agate is the leading game development company in Indonesia and one of the largest in Southeast Asia. We are positioning ourselves as a development partner, working closely with partners and contributing to the overall creative and strategic direction of each game.

16+
Years of experience

300+
Games developed

200+
Clients

200+
Skilled professionals

5 Locations:
US, Canada, Germany, South Korea, Indonesia

With Talents Who Have Been Involved In AAA Titles:

INDONESIAN GAME START-UP

ABOUT AGATE

Founded in 2009, **Agate** has reshaped Indonesia's gaming landscape and achieved global success.

Growth driven by full-cycle development services, including co-development, highlighting Agate's ability to deliver high-quality gaming experiences and foster strong global partnerships.

Agate, now with a growing global presence in Canada, Germany, South Korea, and a developing team in the Americas, is poised to further its international reach. Agate aims to enhance its global market share and extend its influence worldwide, delivering innovative and immersive gaming experiences to millions of players.

CANADA

GERMANY

SOUTH KOREA

AMERICA

INDONESIA
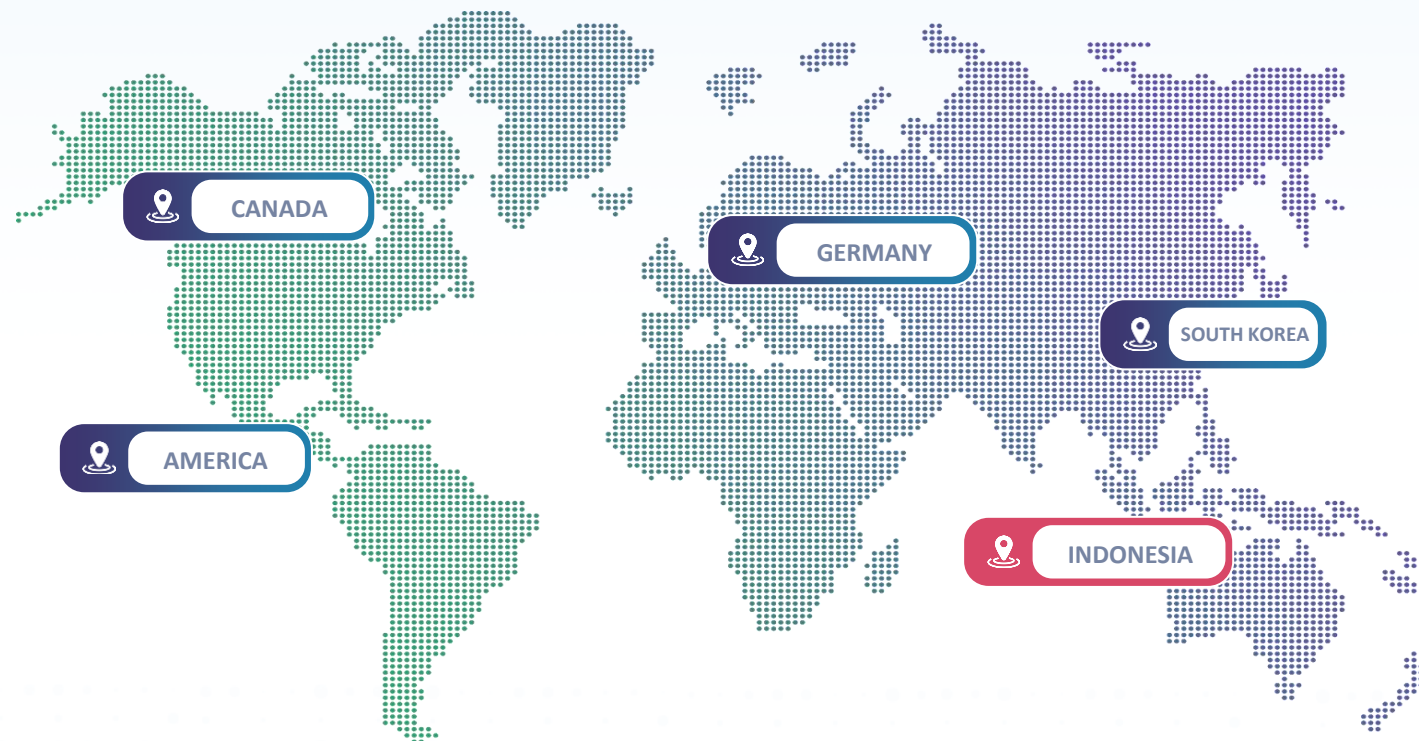
Consumer Games

50+
Games across various platforms

9
Active IPs across PC and Console

10M+
Lifetime players across platforms

Gamification Business

150+
Corporate Clients worldwide

30%
Savings for corporate training clients

20x
Increase in sales and activations