

# ***MONTHLY GAME INDUSTRY REPORT***

**October 2022**

**MOBiDiCTUM**

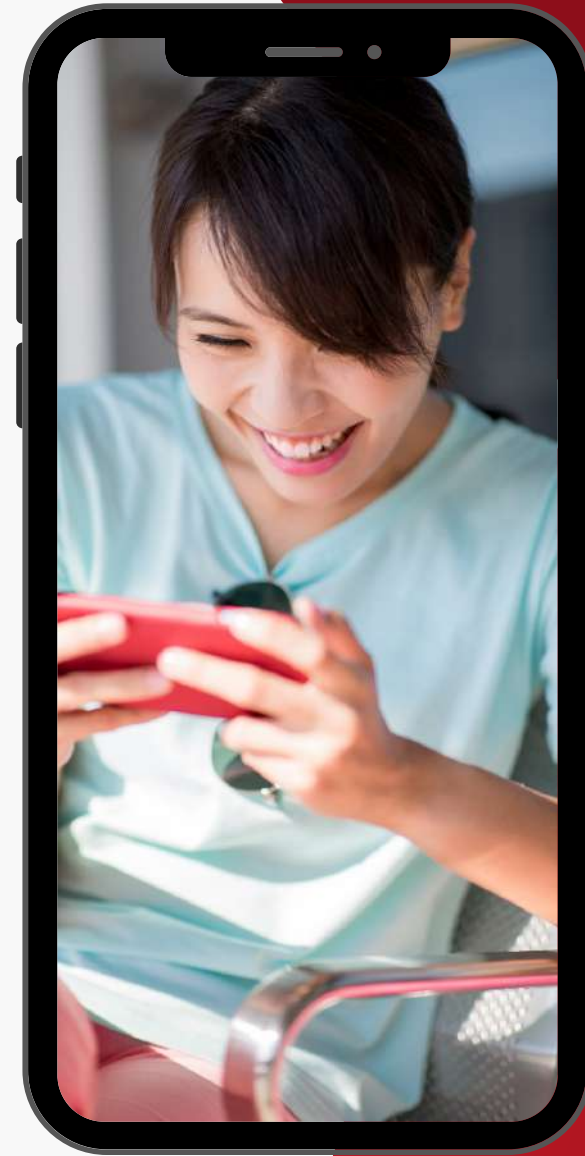


# Index

## Games and Apps

1. Highest-grossing mobile games in 2022
2. Most downloaded mobile games of August 2022
3. Top 20 Mobile games in August 2022 by revenue, downloads, and ad creatives
4. Best performing games of Q2 2022 per consumer spending
5. RAID: Shadow Legends hits the \$1 billion milestone
6. Call of Duty: Mobile reaches 300 million downloads and more earns "way above \$1 billion"
7. Genshin Impact reaches \$3.7 billion in lifetime player spending

## Financial Reports



# Index

## Genres

1. Case study: Are arcade idle games dying?
2. Tenjin Q3 2022 Hyper-Casual Benchmark report
3. Unity's latest report claims 77% of gamers play multiplayer titles
4. Hardcore mobile games in Western Europe saw a growth of 27%

## Market Research

1. Mobile games will make up half of all the revenue in the gaming industry by 2030, per GlobalData.
2. Full-screen ad eCPMS showed growth across all mobile markets in Q2 2022
3. Accessible and immersive experiences are the future of gaming, says CTA
4. Mobile games market revenue declines in the first half of 2022
5. Virtual reality in the gaming market value to reach \$86 billion by 2031
6. SocialPeta H1 2022 Mobile Game: Israel is home to the best casual games in the world



# GAMES & APPS



































## Highest grossing mobile games of August 2022

“Change is an inevitable part of life” is a memo Tencent apparently didn’t get. As per usual, Honor of Kings and PUBG Mobile from the Chinese gaming giant top the overall revenue chart, per Sensor Tower’s data.

The top four spots saw no change in August 2022 in worldwide overall revenue, however, two interesting changes catch the eye almost immediately. The first one is Activision Blizzard’s Diablo Immortal reaching the top 10 once again, this far climbing as high as the sixth spot, and the second one is Sony’s Fate/Grand Order ranking as the fifth most revenue-generating game in the 31-day period.

OVERALL REVENUE		
1	 <b>Honor of Kings</b> TENCENT	—
2	 <b>PUBG Mobile</b> TENCENT	—
3	 <b>Genshin Impact</b> MIHOYO	—
4	 <b>Candy Crush Saga</b> KING	—
5	 <b>Fate/Grand Order</b> SONY	△
6	 <b>Diablo Immortal</b> BLIZZARD	★
7	 <b>Roblox</b> ROBLOX	▽
8	 <b>Uma Musume Pretty Derby</b> CYBERAGENT	▽
9	 <b>Coin Master</b> MOON ACTIVE	▽
10	 <b>Pokémon GO</b> NIANTIC	▽
APP STORE REVENUE		
1	 <b>Honor of Kings</b> TENCENT	—
2	 <b>PUBG Mobile</b> TENCENT	—
3	 <b>Genshin Impact</b> MIHOYO	—
4	 <b>Diablo Immortal</b> BLIZZARD	△
5	 <b>Fate/Grand Order</b> SONY	△
6	 <b>Candy Crush Saga</b> KING	▽
7	 <b>Roblox</b> ROBLOX	▽
8	 <b>Three Kingdoms Tactics</b> ALIBABA	▽
9	 <b>Uma Musume Pretty Derby</b> CYBERAGENT	—
10	 <b>Pokémon GO</b> NIANTIC	△
GOOGLE PLAY REVENUE		
1	 <b>Lineage M</b> NCSoft	△
2	 <b>Coin Master</b> MOON ACTIVE	▽
3	 <b>Candy Crush Saga</b> KING	▽
4	 <b>Lineage W</b> NCSoft	△
5	 <b>Uma Musume Pretty Derby</b> CYBERAGENT	▽
6	 <b>Pokémon GO</b> NIANTIC	—
7	 <b>Roblox</b> ROBLOX	—
8	 <b>Genshin Impact</b> MIHOYO	△
9	 <b>Garena Free Fire</b> GARENA	▽
10	 <b>Fate/Grand Order</b> SONY	▽

[See the full report here](#)

## Highest grossing mobile games of August 2022

Tencent's Honor of Kings generated over \$222 million in revenue in August and held its throne. The mobile MOBA is still heavily China-dependent in terms of revenue, as about 94% of its income comes from home grounds. Tencent and its publishing arm Level Infinite soft-launched the game in a number of countries nearly a month ago, but it's too early to see any drastic changes and the game is yet to fully launch worldwide. Taiwan (2.3%) and Thailand (1.8) come second and third in player spending for Honor of Kings.

Another Tencent title, PUBG Mobile, is doing quite well and ranks second in overall revenue and Apple's App Store revenue charts. The mobile battle royale game earned approximately \$156.3 million and roughly 60% of the revenue came from China, where the title is dubbed "Game for Peace". The United States-based players brought 8.8% of the revenue and ranked second in this regard. Sensor Tower didn't share the third-ranking country for PUBG Mobile, but it's usually Turkey following after these two countries.

MiHoYo's Genshin Impact and King's Candy Crush Saga held their third and fourth positions, while Sony's Fate/Grand Order took over Roblox's place in August.

[See the full report here](#)



## Highest grossing mobile games of August 2022

It's no surprise to see Activision Blizzard and NetEase's Diablo Immortal, if anything the game should have made it to the list way earlier, but its China release was delayed till July 25 due to several reasons.

Diablo Immortal generated a hefty \$97 million in just one month, seeing a 42% month-over-month increase in revenue. Despite the heavy criticism coming from the fans, the role-playing game is doing quite well in terms of both download numbers and revenue.

China takes first place again as nearly 61% of the game's overall revenue comes from the far eastern country, USA follows with a little over 16%; the third country with the most revenue wasn't disclosed.






























[See the full report here](#)



## Most downloaded mobile games of August 2022

According to Sensor Tower's data mobile games generated over 4.6 million downloads across App Store and Google Play, the decrease year-over-year is marked at 1.6%. The country with the most mobile game downloads is India with over 787 million (17%), followed by Brazil (8.2%) and the US (8.1%).

Reminder; Sensor Tower's Android data is strictly based on Google Play. Downloads from third-party Android stores in China or other regions aren't included in the report.

OVERALL DOWNLOADS				APP STORE DOWNLOADS				GOOGLE PLAY DOWNLOADS			
1		Subway Surfers	MINICLIP	1		Subway Surfers	MINICLIP	1		Subway Surfers	MINICLIP
2		Stumble Guys	KITKA GAMES	2		Stumble Guys	KITKA GAMES	2		Stumble Guys	KITKA GAMES
3		Garena Free Fire	GARENA	3		Survivor! io	HABBY	3		Garena Free Fire	GARENA
4		GT Car Stunt Master 3D	ZEGO GLOBAL	4		Roblox	ROBLOX	4		GT Car Stunt Master 3D	ZEGO GLOBAL
5		Candy Crush Saga	KING	5		Fishdom	PLAYRIS	5		Ludo King	GAMETION
6		Ludo King	GAMETION	6		Tower of Fantasy	PERFECT WORLD	6		Candy Crush Saga	KING
7		Roblox	ROBLOX	7		PUBG Mobile	TENCENT	7		Save the Doge	WONDER GROUP
8		Save the Doge	WONDER GROUP	8		Honor of Kings	TENCENT	8		School Party Craft	CANDY BOOM GAMES
9		School Party Craft	CANDY BOOM GAMES	9		Call of Duty: Mobile	ACTIVISION	9		Snow Race	CYBERAGENT
10		Snow Race	CYBERAGENT	10		Candy Crush Saga	KING	10		Roblox	ROBLOX

[See the full report here](#)



## Most downloaded mobile games of August 2022

Sybo Games' Subway Surfers continues to thrive. The game saw over 33.5 million installs in August 2022 alone. Compared to the last year this time around, the game saw an increase of 89.4% in regard downloads. According to Sensor Tower, the game generates most of its downloads in China (28.5%), followed by India (13.3%).

Kitka Games' Stumble Guys —the studio was acquired by Scopely earlier this month— was the second most installed mobile game, generating over 26 million downloads. The game was highly popular in Indonesia (15.2%) and in the US (14%).

Garena Free Fire from Garena didn't move at all and kept third place in August 2022, meanwhile, GT Car Stunt Master 3D from Zego Global appeared on the list for the first time, landing in fourth place immediately.

[See the full report here](#)

## Mobile Games in August – Top 20 revenue, downloads, and ad creatives

With the aid of its App Intelligence and other modules, SocialPeta sorted out the top 20 global mobile games by revenue, download, and advertising in August 2022, hoping to be of assistance to more people in the mobile app industry who try to understand the changing trends of the global mobile market.

The overall performance of global mobile games in August:

- FGO recorded a 150% surge in revenue to top the revenue chart thanks to its 7th-anniversary celebration.
- Uma Musume Pretty Derby's South Korean version experienced a slump in revenue, which was all the operator's fault.
- Talking Tom and Temple Run were on the download chart, indicating that old parkour games were gaining popularity again.
- Midcore and hardcore mobile games beat puzzle casual games in advertising to greatly change the advertising charts.

Here on out, a reminder is in order. SocialPeta's data comes from App Store and Google Play alone. Third-party Android channels are excluded from this report

[Check out the full report here](#)



# Highest-grossing mobile games in August 2022

Though it has been 7 years since its release, Fate/Grand Order can still generate very high revenue. In August, the game had events and updates including the 7th-anniversary celebration for its Japanese version, a rerun of the popular character Ryōgi Shiki, a collaboration with “Tsukihime”, and the introduction of summer swimwear.

Boosted by such high-frequency, high-quality, and high-popularity card pool updates, FGO recorded a soaring revenue. The game raked in nearly \$70 million in revenue from the App Store and Google Play, up 150% Month-on-Month (MoM) on the App Store and up 63.4% MoM on Google Play, which was the highest revenue in the year. Gamers were also surprised that the game’s Japanese version generated a revenue of over 10 billion yen in one month.

Unlike the old yet popular FGO, Uma Musume Pretty Derby didn’t show a good performance. First, the revenue of its Japanese version went down on both the App Store and Google Play, down 25% MoM on the App Store and 13.4% MoM on Google Play. Due to the stupidity of its operator Kakao Games, the game’s South Korean version (released in June) saw a rapid collapse in its reputation, its rating dropped to 1.4 on Google Play, and its revenue declined by 33.2% MoM on Google Play in August.

## Global Mobile Game Revenue TOP20 | Aug. 2022

App Store

Google Play

1	NEW	Candy Crush Saga	King	1	+1	Coin Master	Moon Active
2		Roblox	Roblox	2	-1	리니지M	NCSoft
3	NEW	Fate/Grand Order	Aniplex	3	+4	Fate/Grand Order	Aniplex
4	-1	Pokémon GO	Niantic	4	-1	Candy Crush Saga	King
5	+1	Homescapes	Playrix	5	-1	Roblox	Roblox
6	-2	Genshin Impact	miHoYo	6	NEW	Lineage W	NCSoft
7	+5	PUBG MOBILE	Tencent	7	-2	ウマ娘 プリティーダービー	Cygames
8	-3	Royal Match	Dream Games	8	=	Pokémon GO	Niantic
9	-1	Clash of Clans	Supercell	9	+3	Gardenscapes	Playrix
10	+1	モンスターストライク	XFLAG	10	NEW	Clash of Clans	Supercell
11	-1	Coin Master	Moon Active	11	-5	モンスターストライク	XFLAG
12	-5	Diablo Immortal	Blizzard Entertainment	12	NEW	PUBG MOBILE	Level Infinite
13	+3	Puzzles & survival	37GAMES	13	+4	Royal Match	Dream Games
14	=	Evony	Top Games	14	+1	Garena Free Fire	Garena
15	+4	Fishdom	Playrix	15	+1	Evony	Top Games
16	-3	State of Survival	FunPlus	16	-7	Genshin Impact	miHoYo
17	-8	ウマ娘 プリティーダービー	Cygames	17	+1	Homescapes	Playrix
18	+2	Gardenscapes	Playrix	18	-7	우마무스메 프리티 더비	Kakao Games
19	NEW	Call of Duty : Mobile	Activision Publishing	19	=	Township	Playrix
20	-3	Rise of Kingdoms	Lilith Games	20	-6	State of Survival	FunPlus

[Check out the full report here](#)

# Most downloaded mobile games in August 2022

Subway Surfers received about 19 million downloads on Google Play in August, up 2.7% MoM. Most of its downloads were from India (accounting for 24.3%), Brazil, and Pakistan. With its novel and fun gameplay of racing and driven by the influence of TikTok's web celebrity lexakt\_, Subway Surfers triggered a wave of racing in Brazil. For instance, there was an amazingly huge number of Brazilian gamers ranked on the global racing rankings of Subway Surfers.

The old parkour game Temple Run was popular again on social media thanks to the funny live-action parkour videos. The game got over 10.3 million downloads on Google Play, up 30.4% MoM. According to sources, recently Warner Bros considered producing a film adapted from Temple Run. Talking Tom Gold Run, another game of the Talking Tom series, took a spot on the chart with about 2 million downloads on the App Store in August, up 26.7% MoM.

Antistress is a casual mobile game released by JindoBlu in November 2016. With its simple gameplay and diversified new items, the game attracted gamers' attention again through TikTok receiving 8.4 million downloads on Google Play in August. Save the Doge, a casual game of Wonder Game was new on the charts of Google Play and the App Store. Thanks to its eye-catching dog heads, massive ads, and gameplay of drawing lines, the game was a big surprise in August and rapidly popular in advertising. It had been downloaded a total of 12.5 million times.

## Global Mobile Game Download TOP20 | Aug. 2022

App Store

Google Play

1	■	 Stumble Guys	Kitka Games	1	+1	 Subway Surfers	Sybo Games
2	NEW	 Survivor! io	HABBY	2	+2	 Candy Crush Saga	King
3	-1	 Subway Surfers	Sybo Games	3	-2	 Ludo King™	Gametion
4	■	 Fishdom	Playrix	4	NEW	 GT Car Stunt Master 3D	Zego Global Publishing
5	-2	 Roblox	Roblox	5	-2	 Stumble Guys	Kitka Games
6	NEW	 Tower of Fantasy	Level Infinite	6	+7	 Snake Lite	Hippo Lab
7	■	 8 Ball Pool™	Miniclip	7	+11	 Snow Race!!	GOODROID
8	■	 Candy Crush Saga	King	8	NEW	 Save the Doge	Wonder Game
9	-4	 Magic Tiles 3	Amanotes	9	NEW	 School Party Craft	Candy Room Games & RabbitCo
10	NEW	 Save the Doge	Wonder Game	10	+1	 Carrom Pool	Miniclip
11	NEW	 Township	Playrix	11	NEW	 Temple Run	Imangi Studios
12	-2	 Among Us!	InnerSloth	12	-4	 Race Master 3D	SayGames
13	-2	 UNO!™	MatteH63	13	-1	 Roblox	Roblox
14	NEW	 Talking Tom Gold Run	Outfit7 Limited	14	-8	 Garena Free Fire MAX	Garena
15	■	 Garena Free Fire	Garena	15	-5	 Bridge Race	Supersonic
16	+2	 Call of Duty : Mobile	Activision Publishing	16	+1	 GT Mega Ramp Stunt Bike Games	TV Games Studios
17	NEW	 Crowd Evolution!	Rollie Games	17	-3	 My Talking Tom Friends	Outfit7 Limited
18	-9	 PUBG MOBILE	Tencent	18	NEW	 Antistress	JindoBlu
19	NEW	 Makeup Kit	Crazy Labs	19	-4	 Garena Free Fire	Garena
20	NEW	 Homescapes	Playrix	20	-15	 Shoot Bubble	IVYGAMES

[Check out the full report here](#)



# Global mobile game advertising in August 2022

There was a total of 27 new advertisers on the charts because many new mobile games started advertising massively in August. Dog heads gained much popularity. There were 3 new mobile games with dog head icons on the top 20 advertising chart in August, including:

- 英雄戰紀, a game of Bingchuan Network, had a total of 4400 creatives released on the App Store and Google Play combined, mainly in China's Hong Kong, Macao, and Taiwan regions;
- X-HERO, a game of Bingchuan Network, had 1300 creatives released on iOS mainly in Switzerland, the UK, and the United States;
- Epic Heroes, a game of Dinosaur Games, had the most creatives, with 6600 creatives released on Android mainly in Brazil, Indonesia, and the United States.

SpringGame's MMO mobile game 엑자일: 어벤징 파이어 started advertising on August 9 and had released over 3400 creatives on the App Store and Google Play combined. Eskyfun's metaverse MMO mobile game 時之約 started advertising on July 27 and had released over 6000 creatives on the App Store and Google Play combined, mainly in China's Hong Kong, Macao, and Taiwan regions, and Singapore and Malaysia.

There were fewer creatives for puzzle casual mobile games. Compared to July, Word Trip and Daily Themed Crossword fell out of the charts. Popular game advertiser Coloring Book! had about 2900 creatives on the App Store and Google Play, down 55.4% MoM, and down 17 spots on the charts.

## Global Mobile Game Advertising TOP20 | Aug. 2022

App Store

Google Play

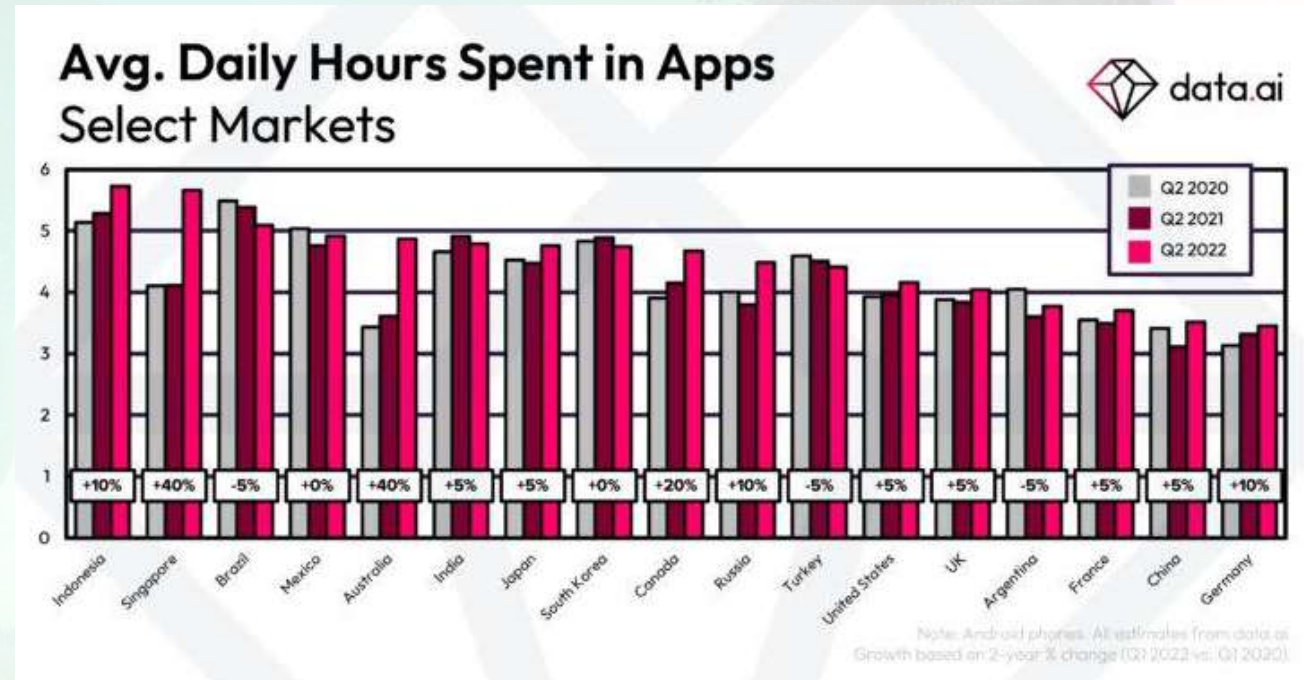
1	+4	The Ants	ChengDu Starvision Interactive Entertainment	1	NEW	Star 371	International Games System
2	NEW	Kids Games Puzzle for Toddler	BEHPOLO	2	NEW	Tower of Fantasy	Level Infinite
3	NEW	엑자일: 어벤징 파이어	sp_games	3	NEW	Vegas Live Slots	PLAYDOGS
4	NEW	英雄戰紀	BINGCHUAN NETWORK	4	NEW	Desert Scarab	Krishna sami
5	NEW	時之約	Sky Entertainment	5	-4	Scatter Slots	Murka Games
6	NEW	歡樂大東家	SINGAPORE JUST GAME	6	+6	Tongits Go	Spirejoy 5G
7	NEW	Township	Playrix	7	+2	Sweet Color	Tapque Tech
8	NEW	T3 Arena	XO Entertainment	8	+10	JinJinJin	ARC PLAY
9	NEW	Sausage Man	XO Entertainment	9	NEW	Merge Master	HCMA GAMES
10	NEW	Giang Hồ Kỳ Hiệp 3D	Funtap	10	NEW	Epic Heroes	Dinosaur Games
11	+2	Fishdom	Playrix	11	-6	Pharaoh's Slinger	Dheeraj maurya
12	NEW	Sniper 3D	Wildlife Studios	12	NEW	Tofu Girl	JoyPac
13	-5	Evertale	ZigZagGame	13	NEW	Mystic Numbers	osman inci
14	NEW	Purrfect Tale	BadMouse	14	NEW	Garena Liên Quân Mobile	Garena
15	NEW	RummyCircle	PLAY GAMES24x7	15	NEW	Snake.io	Koosapps Games
16	NEW	Apex Legends Mobile	Electronic Arts	16	NEW	Braindom	Matchingham Games
17	+1	Tennis Clash	Wildlife Studios	17	NEW	Mr Egg	MPB Game Studio
18	NEW	X-HERO	BINGCHUAN NETWORK	18	+1	Jackpot World™	SpinK Games
19	-17	Coloring Book!	Doodle Mobile	19	NEW	Braindom 2	Matchingham Games
20	NEW	Tower of Fantasy	Level Infinite	20	-12	The Grand Mafia	YOTTA GAMES

[Check out the full report here](#)

## Top games per download and consumer spend in Q2 2022

Mobile usage rates have increased. According to new market research prepared by data.ai, it is seen that many countries have spent more than five hours a day on mobile apps in the last two years.

After the big explosion in the industry during the pandemic, we saw significant usage rates decrease significantly. After the declines in many countries and regions, healthy increases were expected. As published in the report, Indonesia, Singapore, Brazil, Mexico, Australia, India, Japan, South Korea, Canada, Russia, Turkey, the USA, and the UK spent more than four hours daily on mobile applications.



[See the full report here](#)



## Top games per download and consumer spend in Q2 2022

Not every country is on the rise, but after a certain period, it seems that this rise can catch up with the pandemic era. Australia and Singapore were the most striking countries on the list, which allocated 40% more time to mobile applications in the second quarter of this year than in Q2 2020.

When we look at the global game lists in downloads, Subway Surfers, developed by Sybo, and Free Fire, developed by Garena, are at the top of many lists. In addition, Stumble Guys, one of the most remarkable titles that have increased its metrics quickly, seems to have increased 23 rankings this quarter.

Bridge Race and Tall Man Run are in the fourth and fifth positions on the global list. In this period, when the industry is rapidly evolving, and the transition from hyper-casual to hybrid-casual is accelerating, such games are frequently seen on global lists.

Top Games by Downloads   Q2 2022										
Worldwide	Australia	France	Germany	Japan	India	Indonesia	Singapore	South Korea	United Kingdom	United States
1 Free Fire	Subway Surfers	Subway Surfers	Subway Surfers	Apex Legends	Ludo King	Free Fire	Subway Surfers	Diablo Immortal	Subway Surfers	Subway Surfers
2 Subway Surfers	Wondle by Goldfinch Studios	Stumble Guys	Fill The Fridge	Dead by Daylight	Free Fire	Stumble Guys	Free Fire	미픽트 이레나	Fill The Fridge	ROBLOX
3 Ludo King	Fill The Fridge	Clash Royale	Hay Day	Project Sekai Colorful Stage! feat. Hatsune Miku	Carrom Pool	Higgs Domino Island	Fishdom: Deep Dive	한부스크로미 2V22	Wondle by Goldfinch Studios	Wondle by Goldfinch Studios
4 Bridge Race	Tall Man Run	Fill The Fridge	Count Masters	Miracle Match	Bridge Race	Mobile Legends: Bang Bang	Fill The Fridge	미픽트 이레나	Tall Man Run	Tall Man Run
5 Tall Man Run	ROBLOX	ROBLOX	Fishdom: Deep Dive	Count Masters	Subway Princess Runner	Subway Surfers	Mobile Legends: Bang Bang	Pokémon GO	ROBLOX	Fill The Fridge

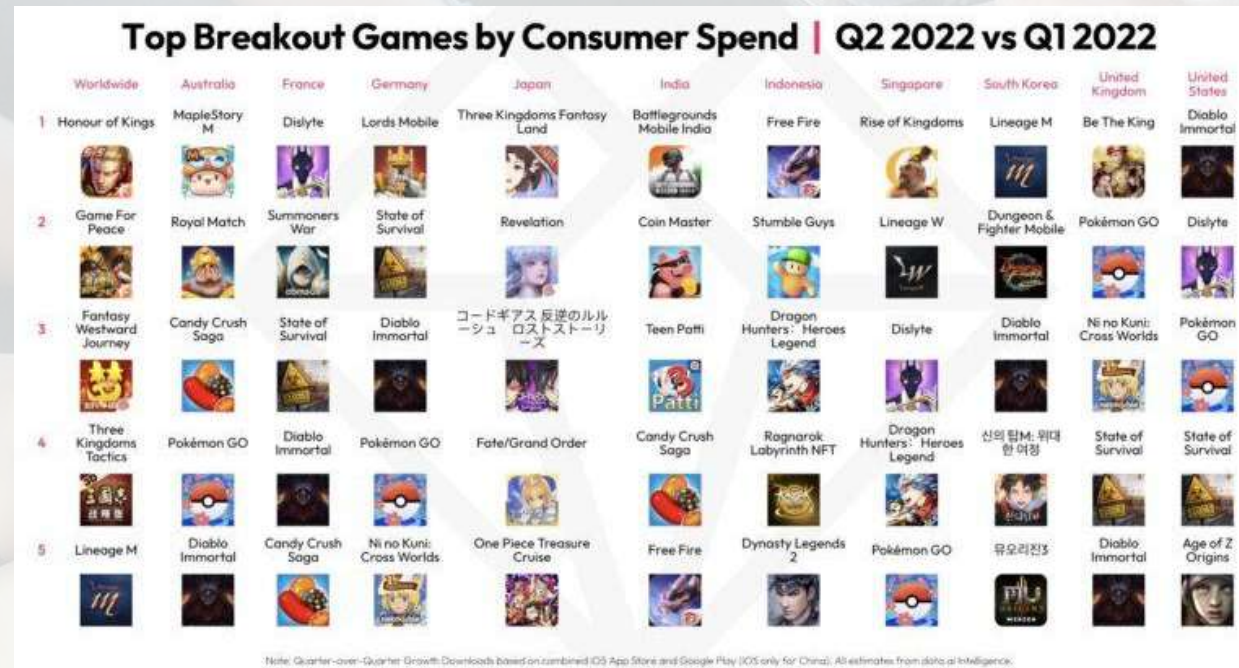
[See the full report here](#)



## Top games per download and consumer spend in Q2 2022

Regarding consumer spending, many games are distributed among countries, but the most prominent game is Pokemon Go. Niantic, which managed to revive the game with its investments and initiatives in emerging markets, ignited a healthy growth even though it could not create the excitement of the first day.

Through various regional events and competitions, the game ranked high in many countries, such as England, Turkey, America, Germany, and Australia, in terms of user spending compared to the same quarter last year. data.ai said that with the upcoming Pokemon GO Fest 2022, it expects another substantial rise in the game's rankings.



[See the full report here](#)



## **RAID: Shadow Legends generated about \$1 billion in revenue**

“Israeli manufacturers seem to be only good at casual and gaming games,” but that argument has been proved wrong by the emergence of Plarium Global, an Israeli gaming company founded in 2009 that is one of the most successful studios in the video game industry, with 380 million gamers worldwide and more than 20 games released. They range from role-playing games in the Vikings: War of Clans and Stormfall series to casual games such as Lost Island: Blast Adventure.

The most famous product of the company is RAID: Shadow Legends. Released in 2019, the game quickly occupied the RPG market in Europe and the United States. The game has been downloaded more than 60 million times and grossed around \$1 billion, thanks to its effective advertising strategy. This year, its average daily quantity of ad creatives is 1,00, and the quantity on Android is 1,600 times that on iOS. However, it saw an obvious decline trend in advertising on Android, in the middle of May, the average daily quantity on iOS devices surpassed the Android devices. The products are mainly promoted in North America and European countries, and the quantity of creatives in the United States accounts for 7.85% of the highest proportion.

In terms of creatives, RAID is far above the high standards of the industry. While most of the materials of RPG games are still in UE form, the character of RAID's creative even has vivid expression changes. In addition, Plarium's video production department specializes in integrating games with players' lives. The high-quality CG brings high expectations to the game, and the “down-to-earth” story also makes players feel more engaged.

[Check out the full report here](#)

## Call of Duty: Mobile exceeds the 300 million download and earns \$1 billion revenue for Activision and Tencent

Call of Duty: Mobile has exceeded the 300 million download milestone and has brought in over \$1 billion in revenue to Activision and Tencent. Consumer spending on Call of Duty: Mobile was "well above" \$1 billion in 2021 alone says Activision.

The weekly earnings sum up to \$5.8 million, and the monthly revenue is \$25.8 million. These numbers are calculated without the 30% cut that Google Play Store and App Store get from every game. Activision also has to share some of its earnings with co-developer Tencent.

Call of Duty: Mobile had a stellar reception with 9.8 million downloads in just 24 hours after its launch. After the first 24 hours, on the second day, the game reached its maximum level of downloads, with 10.5 million users trying to get their hands on the new FPS game. The game's revenue varies between weekdays and weekends, as players tend to spend more money on the latter. The season seven launch saw a record-breaking \$2.2 million revenue on June 13, 2020.

Google Play Store surpasses the App Store in downloads by 7 million, but revenue firmly belongs to iOS, with \$606 million versus \$424 million. The top five countries regarding download count are the US (78 million), Brazil (28 million), India (26 million), Mexico (24 million), and Russia (18 million).

In-app purchase revenue ratings are slightly different, although the US still tops the charts with \$554 million. Japan follows up with \$138 million, and then the numbers drop to two digits with Germany (\$32 million), Brazil (\$30 million), and the UK (\$27 million).

[Read the news piece here](#)



# Genshin Impact reaches \$3.7 billion in lifetime revenue



Genshin Impact, the critically acclaimed RPG-adventure title from miHoYo, has reached \$3.7 billion from player spending. The number covers the span of two years since the game's launch and includes both Android and iOS revenue worldwide.

MiHoYo initially launched the game on September 28, 2020, and it was well received by fans and critics alike. Genshin Impact is placed at number three in the global mobile revenue list, behind two popular games from Tencent. PUBG Mobile takes second place with \$4.9 billion, while Honor of Kings takes the “crown” with a whopping \$5.5 billion in revenue in the past two years.

The data provided by SensorTower also shows the international success of the game. Genshin Impact has accumulated \$2.5 billion outside of China in the App Store, and Play Store combined. This amount coins the game second place in the international revenue list, surpassing Candy Crush Saga, which has \$2.3 billion. Topping the charts is Roblox Corporation's hit game Roblox with \$2.5 billion.

According to the information, Genshin Impact also sits on the throne among games that use gacha monetization. During Q1 and Q2 of 2022, the global mobile games market saw a constant decline on a year-over-year comparison. In contrast, Genshin Impact's player spending increased by 6% in Q1 to \$556 million, and Q2 revenue saw an increase of 28 percent to \$413.5 million year-over-year.

SensorTower points out that Genshin Impact has done well in China, Japan, and the USA, as the countries brought in 33%, 24%, and 17% of the game's total revenue, respectively. The data company shares, however, that Q3 of 2022 might bring a decline to Genshin Impact's year-over-year revenue.

[Read the report here](#)



# FINANCIAL STATEMENTS



## Nexters reports record-high revenue growth for H1 2022



The company reported a net loss of \$20 million in the same period last year and achieved a record net income of \$33 million in Q2 2022. It also adjusted the company's EBITDA to \$73 million in the first half of this year and \$46 million in the second quarter. These numbers are high compared to the \$22 million in the first half of last year and the \$15 million in the second quarter.

Revenues in the first half of 2022 were announced as 252 million dollars and 126 million dollars in the second quarter. These numbers mean 28% and 15% year-on-year increases, respectively, compared to last year.

The company seems to have generated a relatively high inflow of money from its operating activities. Nexters reported an operating profit of \$39 million in the first half and \$21 million in the second quarter.

## Board changes took place

The Q1 2022 financial report published by the company last month stated that there would be changes in the board of directors. Noting that Nexters made these changes to increase sustainability, the company announced that Ivan Tavrín would resign from the board of directors and chairman of the board.

The board changes announced by Nexters in its latest report were as follows:

- Marie Holive, Olga Loskutova, and Tal Shoham were elected as the new Independent Directors at the general meeting.
- Natasha Braginsky Mounier has been named Chairperson of the Board by the newly composed Board of Directors.

[Read the financial report here](#)



# GENRES



## Are arcade idle games really dying? – Aquarium Land Case Study

In the last few years, hyper-casual games have been the driving force in the mobile games space, however, the genre has been facing one major obstacle after another across both storefronts, App Store and Google Play. Of course, being extremely lucrative and delivering fast results, the hyper-casual games immediately caught the interest of mobile developers and publishers, expanding in the market while giving rise to many sub-genres.

Arcade idle is one of the most eye-catching sub-categories of hyper-casuals and it's been a popular one for quite some time, but of course, its hype train eventually slowed down and came the inevitable question of "is it dying, is it still a lucrative game model?"

Victor Vielliard, Studio Partnerships at Homa Games, decided to address this question (and its variations) with his insights. He also shared a case study on his LinkedIn page, showing how it helped boost Aquarium Land's (an arcade idle by Turquoise) in-app purchases revenue.

Vielliard said "Arcade idle (and any other hybrid games for that matter) require a whole new production pipeline in order for them to work, achieve success and profitability" and added that, "you can't expect to treat them the same way as your hyper-casual games."

The experienced game publisher then explained the following insightful steps;

- Engagement Metrics should be the focus (minimum 40% Day 1 Retention and minimum 20 min of playtime), and CPI comes after.
- You should work at least 3 to 5 months before launching your game to make sure it is polished enough and have as much content as possible for the player to get hooked and continue playing
- Make sure to build the in-game economy as soon as possible to leverage the IAP potential of your game efficiently (aim to have at least 20% of Revenue coming from IAP)

[Read Homa's case study here](#)



## Tenjin shared its Hyper-Casual Benchmark Report for Q3 2022

The report opens up with an executive summary, stating quick facts:

- Android has now reached an all-time high in hyper-casual ad spend share with 57%.
- The CPI gap has decreased between Android and iOS and is just \$0.1 at this point.
- Brazil stands out with a very low CPI when compared to ad spend.
- The USA tops the charts in ad spend for both Android and iOS.
- Mintegral and Unity Ads have the lowest CPI for Android and iOS, respectively.

The summary also contains retention numbers for games in the top 2%. Day one retention has been determined as 51% and 42% on iOS and Android, respectively. Retention numbers for day seven are 22% to 16%.

According to the data, Android increased 7% in ad spend share compared to Q1 2022. The iOS vs. Android CPI gap has moved from its four-year-old place of 15 cents to 10 cents, as Tenjin comments that this could mean “a significant rise in competition” for Android.

[Read Tenjin's hyper-casual report here](#)

## Tenjin shared its Hyper-Casual Benchmark Report for Q3 2022

The top ten countries by ad spend are also included, with the USA, Japan, and Brazil at the top of the list for Android. While the first two countries stay the same for iOS, the UK takes third place on the platform.

Median CPI by ad spend saw the US (\$0.56 and \$0.71) and Japan (\$0.44 and \$0.66) at the top of the charts again for both Android and iOS. Spot number three belonged to Canada (\$0.35) for Android and Australia (\$0.44) for iOS.

AppLovin, Google Ads, and Mintegral were the top three ad networks for Android. AppLovin was determined as the leader for iOS as well, with Mintegral and ironSource following up in second and third place.

Ad network median CPI results revealed Mintegral (\$0.08), AdColony (\$0.10), and ironSource (\$0.10) as the top three for Android. Unity Ads (\$0.15), Mintegral (\$0.19), and ironSource (\$0.23) led the charts for iOS.

In addition, retention benchmarks were specified for the top 2%, top 25%, and median games, which showed a large difference in day one and day seven retention rates on both platforms. Day one and day seven retention rates were better on iOS than on Android for all three categories.

*"This data comes from many thousands of hyper-casual mobile games, offering devs useful insights on where their user acquisition spend can be targeted for maximum impact. On a macro level, it also indicates increasing ad spend and CPIs on Android, continuing the recent trend of Android ascendancy, although retention remains considerably stronger on iOS."*

*-Roman Garbar - Marketing Director, Tenjin*

[Read Tenjin's hyper-casual report here](#)



## Unity 2022 Multiplayer Report states 77% of gamers play multiplayer games

Unity has shared its 2022 Multiplayer Report, focusing on the multiplayer genre and its popularity. The report states that more than half of the global population play games (52%), and 77% of them play multiplayer. The survey was conducted with more than 1500 participants in the US, UK, Japan, and South Korea, which represent four of the world's six biggest gaming markets by revenue.

According to the report, people mostly choose their games based on the genre. In the survey, almost half of the gamers (49%) listed genre as one of the top three reasons for selecting a game. Battle Royale and FPS were the most popular genres, with a 32% vote for each, followed by sports (24%), racing (23%), and fighting (18%).

FPS (9%), sports (8%), and racing (8%) were over the global average in the UK, whereas MOBAs and RTS were significantly more prevalent in Korea. Compared to global averages, US gamers are less likely to play MOBAs (-7%) and more likely to play FPS (7%) and card games (7%). FPS (-12%) and sports games (-12%) remain under the bar among Japanese gamers, while simulations (6%) and fighting games (7%) climb above average.

[Read Unity's extensive report here](#)

## **Hardcore mobile gaming in Western Europe saw a 27% growth, hyper-casual down by 33%**

According to a recent study conducted and published by India-based CyberMedia Research (CMR), in Western Europe, both hardcore mobile gaming and casual mobile gaming experienced growth year-over-year. However, hyper-casual gamer numbers declined drastically per the report.

CMR's data suggests hardcore mobile gaming grew by 27% and casual mobile gamer numbers saw a growth of 8%, meanwhile, hyper-casual gamer numbers saw a decline of 32% in the region.

The report says hardcore gamers participate in 18 online gaming matches per day on average, and the increase in hardcore gaming is driven by game time, powerful smartphones becoming more accessible and the market itself becoming more mature.

CMR's research also claims one-fifth of the total mobile gaming apps are paid apps in the region compared to the same period last year around, and players are more open to making in-game purchases post-covid period. The data provider also adds that they've recorded a 33% jump in the amount of time spent playing mobile games.

[Read the detailed gaming report here](#)



## Hardcore mobile gaming in Western Europe saw a 27% growth, hyper-casual down by 33%

The research company also believes that hardcore mobile gamers are becoming more aware of chipset brands as well as which products offer better game performances, faster loading times, and longer battery lives.

CMR's mobile gaming survey covered 2036 mobile gamers living in major Western European cities, aged between 14 to 30.

*"Through the course of the pandemic, mobile gaming has been on the rise in Western Europe. Our mobile gaming insights in Western Europe point to an inflection in hardcore and casual mobile gamers, driven by smartphones across price tiers. In the Android smartphone market, the rise of these enhanced gaming experiences can be attributed to powerful smartphone processors.*

*"In the recent past, MediaTek has been able to make strong in-roads into the android smartphone gaming market, gaining consumer awareness and acceptance with its MediaTek Dimensity 5G and MediaTek Helio 4G chip series. Going forward, I believe the brand is potentially poised to make stronger market gains."*

*-Prabhu Ram - Head-Industry Intelligence Group, CyberMedia Research*

[Read the detailed gaming report here](#)

# MARKET RESEARCHES





## GlobalData reports mobile will generate over half of a \$470 billion game industry by 2030

The report predicts that the domination of mobile over traditional gaming, which is PC and console, will continue through the years. The game industry has a projected growth of \$470 billion in 2030, which was only \$197 billion in 2021.

Mobile has expanded beyond the combination of the PC and console game industries, per the report, stating that almost 57% of global video game revenue came from mobile games in 2021.

Principal Analyst of the GlobalData Thematic Intelligence team, Rupantar Guha, explains that even giant names in traditional gaming, such as Activision Blizzard and EA, are starting to focus on mobile for its revenue potential and popularity.

Cloud gaming is also looking to shift gears in the upcoming years and is expected to be the fastest-growing segment in the industry. The report predicts a \$30 billion revenue for the cloud industry by 2030, a huge leap from last year's \$2 billion.

[Read GlobalData's extensive report](#)

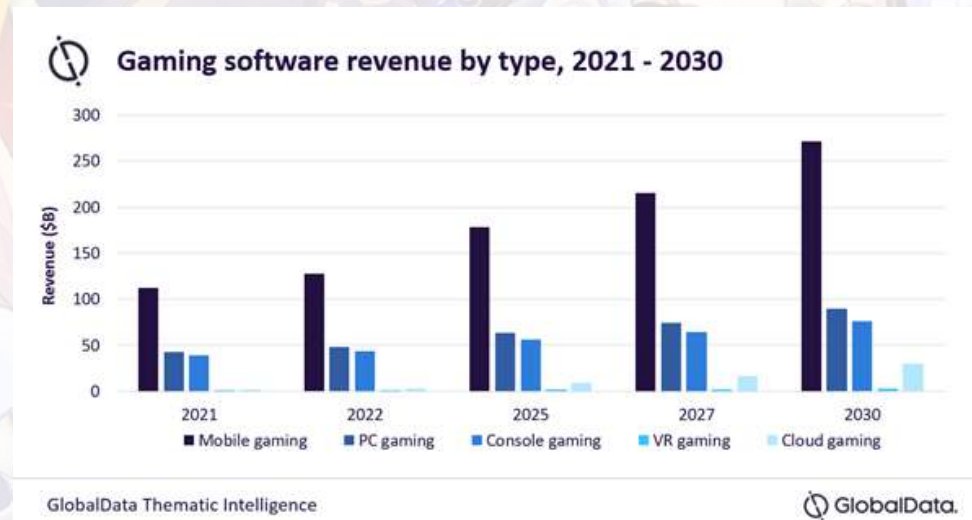


# GlobalData reports mobile will generate over half of a \$470 billion game industry by 2030

Guha has shared his thoughts about the immense progress in the game industry as well:

*“The game industry is in the throes of a transformation driven by themes such as 5G, augmented reality (AR), virtual reality (VR), esports, cloud gaming, and the metaverse. As these themes mature, competition will intensify among traditional game publishers, tech giants, and companies in other sectors like retail and tourism. As a result, several leading game publishers will become M&A targets, with tech giants the likely acquirers.”*

The experienced analyst also commented on the cloud industry, stating that it will fundamentally change the ecosystem over the next ten years. Guha explains that tech companies like Sony, Google, Tencent, Microsoft, Nvidia, Meta, and Amazon, combined with telecommunications companies such as Deutsche Telekom, Sunrise, KT, and China Mobile, will intensify the competition and hasten the growth of cloud gaming.



[Read GlobalData's extensive report](#)



## Full-screen ad eCPMS showed growth across all mobile markets in Q2 2022

According to Appodeal's extensive Mobile In-App Ad Monetization Performance Index, prepared by the Founder and CEO Pavel Golubev, Lead Product Marketing Manager Marc Llobet, and Lead Design Generalist Sergey Baranov, the full-screen ad eCPMs have grown across all mobile markets in Q2 of 2022, including all the sub-regions the report discusses.

The index includes extensive data from six regions: the USA, Europe (West and East separately), the Middle East, Asia, and Latin America. The data source also holds over 200 billion impressions coming from more than 70 ad demand sources across iOS and Android.

Per Appodeal's index, besides iOS full-screen ads in USA, all markets have seen significant year-over-year growth in eCPMs. The previous period for the USA shows \$10.77 for full-screen ad eCPM, while the current 12-month period suggests shows a decrease, down to \$9.58. However, Android data speaks of positive results, growing to \$11.06 from \$9.91 a year before.

In Europe, the growth of eCPMs across iOS and Android are minor but at a steady rate. However, the western side of the continent experienced a better rate of growth here, despite being on the more expensive side already.

In Asia, full-screen ads eCPM jumps to \$4.18 from \$3.23 on iOS and to \$1.91 from \$1.50 on Android. The Middle East also goes through a growth period, \$1.96 on iOS (from \$1.22) and \$1.04 on Android (from \$0.78).

Latin America also shows signs of growth in the last 12-month period compared to the previous one. For iOS, a jump from \$1.67 to \$1.81 is observed, meanwhile for Android the jump is from \$1.23 to \$1.56.

[Check out Appodeal's interactive mobile games and eCPM report](#)

## Accessible and immersive experiences are the future of gaming, says CTA

Consumer Technology Association (CTA) has shared a study that refreshes and updates the content of its November 2019 report on the US game industry. According to the report, 73% of US adolescents and adults are active gamers, which accounts for 164 million people out of the 224 million in total.

In the last three years, 9 million people aged between 13 to 64 joined the ranks, and the number of gamers has increased by 3% in the US. The study also divided gamers into three categories based on their activity rate and determined that an average gamer spends an entire day (24 hours) every week playing video games. The categorization is as follows:

- 40.9 million hardcore gamers (with an average of 37 hours weekly)
- 55.6 million core gamers (with an average of 29 hours weekly)
- 67.3 million casual gamers (with an average of 13 hours weekly)

The study mentions an update about the rivalry between digital stores versus mass retailers and specialty gaming stores as well. Digital stores are ahead in the market with 55%, while mass retail clocks in at 40%, and specialty gaming stores at 38%.

According to the shared data, 69% of gamers have spent money on games in the last six months. Hardcore, AR/VR, and metaverse gamers spend yearly averages of \$577, \$626, and \$593, respectively, while core gamers spend \$426.

[Read CTA's detailed report here](#)



## Accessible and immersive experiences are the future of gaming, says CTA



The company has also shared some predictions based on the data comparison between 2019 and 2022. Reportedly, 38 million gamers state their interest in the metaverse. In the latest study, those who believe AR/VR or metaverse will improve gaming experience rose from 8% in 2019 to 22%.

Average time spent on mobile gaming is also on the rise, surpassing game time on consoles by 2.5 hours a week. The study determines cloud and on-demand platforms are becoming more popular as 43% of gamers subscribe to gaming platforms.

*“Accessible and immersive experiences are the future of entertainment, especially in gaming. Gamers are on the cutting edge, and diverse gaming options meet the interests of ever-wider audiences. As we’ll see at CES 2023, game publishers, hardware manufacturers, and retailers all have an opportunity to capitalize on a growing market.”*

- CTA Researcher Steven Hummel

[Read CTA's detailed report here](#)

## Mobile games market revenue declines in the first half of 2022

Mobile gaming continues to grow and is expected to reach new highs in the upcoming five years or so, per reliable data providers such as Data.ai, Niko Partners, Google Gaming, and many others. However, the revenue growth has come to a check and the first half of 2022 saw a decline year-over-year for both Q1 and Q2 according to Sensor Tower's latest report.

The data provider believes the game industry is facing significant headwinds due to the ever-increasing cost of living crisis, inflation, IDFA changes and a few other factors, but ensure the industry experts that this decline was expected. On top of that, numbers are quite positive when compared to the pre-covid period. Meaning even after the post-boom the game industry is performing quite well, just not as well as it did prior to lockdowns.

According to the report, global player spending on mobile games across the App Store and Google Play saw a decline for the first time ever since the peak in Q1 2021, which was approximately \$22.6 billion in overall revenue. It seems like player spending is down by nearly 6% year-over-year for Q1, and Q2 2022 saw a decline of 6.9%, to \$20.1 billion.

[Read the full report here](#)



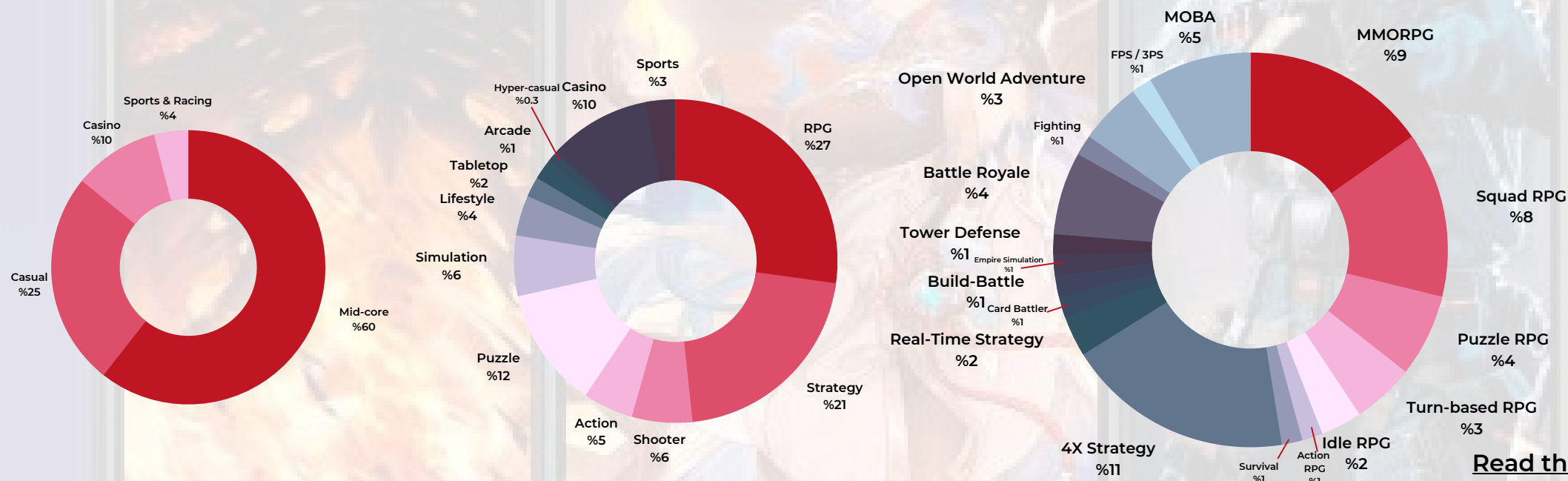
# Mid-core mobile games are the dominant revenue generators

About 60% of the global player spending in mobile games for the first half of 2022 comes from mid-core games. Role-playing games take the number one spot with 27%, followed by strategy games with 21%. Shooters and action games come after, generating 6 and 5% of the overall revenue, respectively.

Meanwhile, casual games generated nearly 26% of the overall revenue for mobile gaming. In this area, puzzle games were the most popular, followed by simulations and lifestyle games.

## The Majority of Mobile Game Spending Is in Mid-Core Games

Worldwide revenue by Game Class, Genre and Sub-Genre in H1 2022



[Read the full report here](#)

# Sensor Tower's global mobile game spending forecast

Despite the headwinds, Sensor Tower predicts ever-increasing player spending figures for both Apple's App Store and Google Play. Per the report, 2022 is just a hiccup along the way (and not even a necessarily bad one), and both markets will see growth every year.

Both stores are forecast to grow at a healthy CAGR, Appstore by 6% and Google Play by 5%; in fact, App Store will continue to grow in 2022 as well and reach \$53 billion. However, the data provider thinks Google Play user spending will dip year-over-year to \$33 billion by the time the year wraps up.

However, Sensor Tower's data doesn't include any third-party marketplaces, meaning China's Android data is non-existent in this report.

## Market Overview: Global Mobile Game Spending Forecast



[Read the full report here](#)



## Virtual reality in gaming market value to reach \$86 billion by 2031

A study conducted by Transparency Market Research predicts that the value of virtual reality (VR) in the gaming market will reach more than \$86.22 billion by 2031. In addition, the research states that between 2022 and 2031, the compound annual growth rate (CAGR) will be 32.3%.

The research covers the regions of North America, Europe, Asia Pacific, South America, the Middle East, and Africa. Among the report's main findings is that the increased spending power in direct proportion to the increasing population of the countries increases the demand for VR game systems. In addition, the research that draws attention to the increase in VR usage in recent years says that this factor creates lucrative opportunities in the game industry.

The research also touches on the fact that cloud technologies are gaining traction in the gaming market. The company also predicts that many innovations brought by cloud technologies to the industry will strengthen the game industry's future.

[Read the full report here](#)

## **SocialPeta H1 2022 Mobile Game Whitepaper: Casual games have grown rapidly since the pandemic**

China is the country that contributed with the most Israeli App installs, accounting for 15% of the total, which is 1% more than the locally installed share. Russian players also account for 12% of the installs, making it the second largest foreign installer of Israeli games. It's worth noting that Israeli games are also very popular in Vietnam, where they account for 8% of installs, just 1% less than in the US.

The most produced genre in Israel in 2021 was casual/hyper-casual games, followed by role-playing and simulation games. About 74% of people work on social/casual game development, followed by about 15% for core games.

[Read the full report here](#)



## Israel is home to the best casual games worldwide



Israeli gaming companies are a relatively new entrant to the global gaming scene, but they have made significant achievements in a short period of time. Israel's homegrown game companies have risen from obscurity in the early 2000s to a global presence in the industry.

Coin Master, developed by Moon Active, is a milestone for the casual gaming sector, with a lifespan of more than 11 years and generating \$1.3 billion in global player spending in 2021. On the hyper-casual and social gaming circuit, Israel is also home to global players like Crazy Labs and Playtika.

[Read the full report here](#)

# MONTHLY MOBILE GAME INDUSTRY REPORT

October 2022

## CONTRIBUTORS

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nexters



HOMA  
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