

MONTHLY MOBILE GAME INDUSTRY REPORT

March 2022

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BUSINESS MEETUP #2



May 13, 2022



IzQ Innovation Center,
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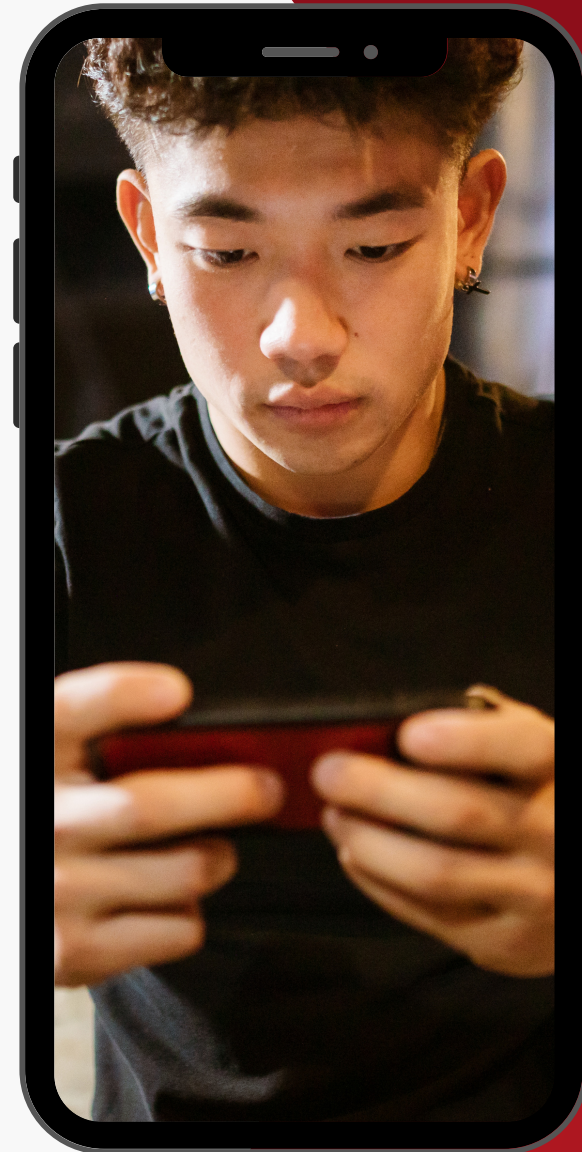


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INDUSTRY REPORTS



Top-grossing mobile games of February 2022

Sensor Tower has listed the highest-grossing games of February 2022. At the top of the list is Honor of Kings from Tencent, whose name we often hear, with a revenue of **225 million dollars**.

China accounts for **95.2%** of **Honor of Kings'** revenues. Although Google Play is not available in China, this vast market is the primary source of income for many games. Of the remaining revenues for Honor of Kings, **2.5%** comes from **Taiwan**, and **1%** comes from **Thailand**.

PUBG Mobile follows Honor of Kings in the list of the most revenue-generating games. PUBG Mobile, also from Tencent, was the second highest-grossing mobile game worldwide in February 2022, with gross revenue of \$205.2 million. As in Honor of Kings, the most revenue-generating market for PUBG Mobile is China. 64.2% of the game's revenues come from China, published under the name Game For Peace, and 7.7% from the USA.

You can view the full report [here](#).

The mobile game market generated \$6.6 billion in revenue in February 2022

The global gaming market generated approximately **\$6.6 billion** in revenue in **February 2022**. This revenue was calculated based on App Store and Google Play data. Compared to last year's same period, global gaming revenues decreased by about 7.6%.

Games with the highest total revenue:

- 1- Honor of Kings
- 2- PUBG Mobile
- 3- Genshin Impact
- 4- Candy Crush Saga
- 5- Roblox
- 6- Coin Master
- 7- Pokémon GO
- 8- Lineage W
- 9- Garena Free Fire
- 10- DBZ Dokkan Battle

Games by App Store revenue:

- 1- Honor of Kings
- 2- PUBG Mobile
- 3- Genshin Impact
- 4- Roblox
- 5- Three Kingdoms Tactics
- 6- Candy Crush Saga
- 7- DBZ Dokkan Battle
- 8- Fantasy Westward Journey
- 9- Pokémon GO
- 10- Umamusume: Pretty Derby

Games by Google Play revenue:

- 1- Candy Crush Saga
- 2- Lineage W
- 3- Coin Master
- 4- Genshin Impact
- 5- Roblox
- 6- Garena Free Fire
- 7- PUBG Mobile
- 8- Pokemon GO
- 9- Clash of Clans
- 10- Evony

You can view the full report [here](#).

49% of mobile gamers use TikTok



Revenue from the mobile platform reached \$93.2 billion in 2021, up 7.3% year on year.

Global streaming hours for TikTok's 100 most popular game themes increased by 533% between the first quarter of 2020 and the first quarter of 2021.

TikTok players were 66% more likely to pay for games than players who don't use TikTok.

According to Newzoo research, **49%** of mobile gamers use TikTok. Mobile gamers using TikTok are more attracted to various genres than non-TikTok users. At the same time, the average TikTok player plays **7.1 types** of games, players who do not use TikTok play about **4.2 types**.

You can view the full report [here](#).

Most downloaded mobile games worldwide: February 2022

Sensor Tower has announced the most downloaded games of February 2022. While India came to the fore with its contribution to the number of downloads, Free Fire from Garena remained the leader in the list.

Compared to the same month of the previous year, **Free Fire** from Garena showed an increase of **22.7%** and reached **21.8 million downloads**. **41%** of the downloads of the game comes from **India**. Brazil follows with **9.4%**.

Subway Surfers from Sybo Games ranks second in the most downloaded mobile games list with **19.5 million** downloads. **18.8%** of Subway Surfers downloads come from **India** and **7.8%** from **Brazil**.

You can view the full report [here](#).

In February 2022, mobile games were downloaded a total of 4.4 billion times

In February 2022, the mobile game market reached **4.4 billion downloads** in total. This means a **0.7% increase** in total downloads compared to last year. About **15%** (670 million) of worldwide downloads came from **India**. The **USA** ranked second with an **8.7%** download rate, followed by **Brazil** with **7.8%**.

Games by highest total downloads

1. Garena Free Fire
2. Subway Surfers
3. Merge Master
4. Candy Crush Saga
5. Roblox
6. PUBG Mobile
7. Twerk Race 3D
8. Ludo King
9. Fishdom
10. Find the Alien

Games by number of downloads in the App Store

1. Wordle
2. Coloring Match
3. Subway Surfers
4. PUBG Mobile
5. Airport Security
6. Roblox
7. Count Masters
8. Clash of Clans
9. Honor of Kings
10. Call of Duty: Mobile

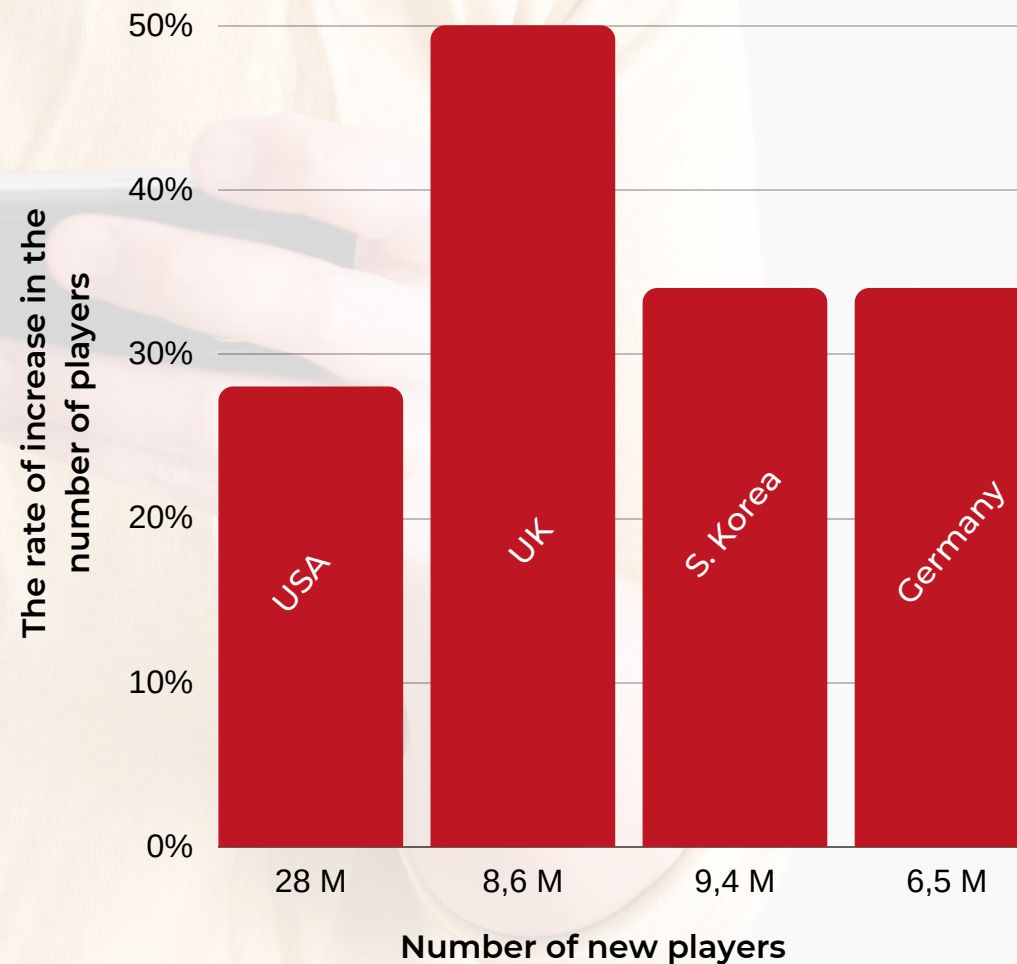
Games by total downloads on Google Play

1. Garena Free Fire
2. Merge Master
3. Subway Surfers
4. Candy Crush Saga
5. Twerk Race 3D
6. Ludo King
7. Find the Alien
8. Roblox
9. Race Master 3D
10. Fishdom

You can view the full report [here](#).

The mobile gaming audience continues to grow

According to Facebook Gaming, the mobile gaming audience has grown since March 2020. Based on the US, UK, South Korea, and Germany mobile game market, the research shows that there are millions of new mobile gamers.



You can view the full report [here](#).

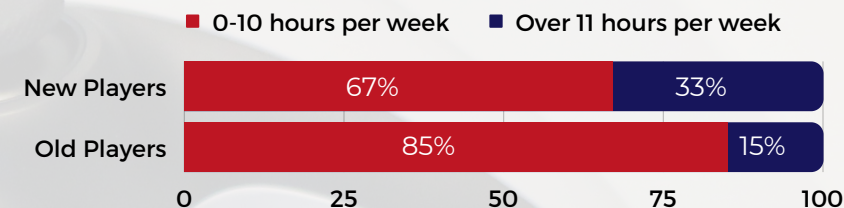
New players spend less time playing the game

New players in the surveyed markets have lower weekly playtimes than older players.

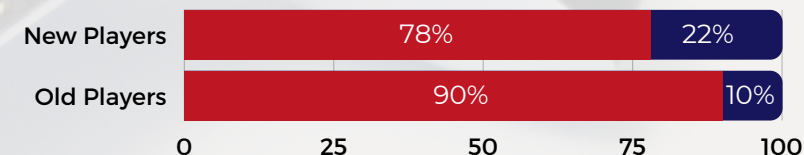
In the US, about 33% of older gamers play for more than 11 hours a week, compared to about 15% of new players.

Weekly Time Spent in Game (Hours)

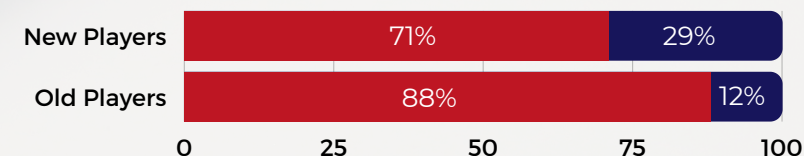
USA



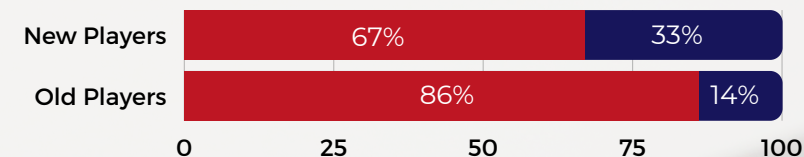
UK



Germany



S. Korea



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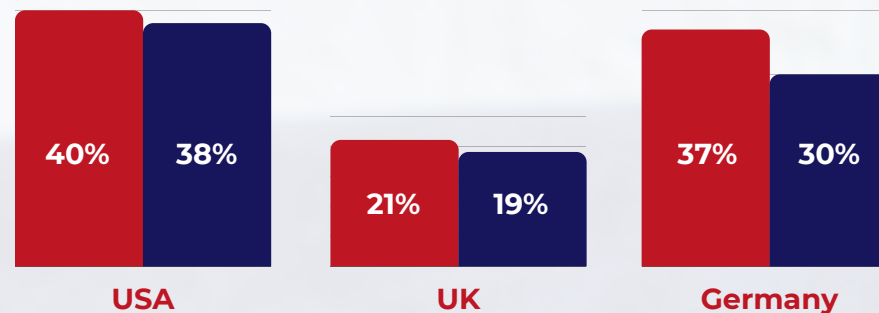
Old players spend more than new players for games

According to Facebook Gaming, former players in the US, UK, and Germany are spending more and playing more. In pre-pandemic reports, the situation was the opposite. Here it is possible to see the impact of the COVID-19 pandemic on young players.

Proportion of Surveyed Players Willing to Spend

From the Players Who Participated in the Survey, Proportion of Spending Per Month*

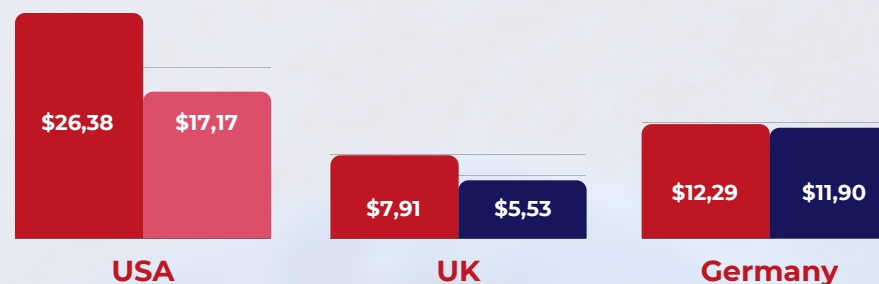
Old Players New Players



*Data not collected for South Korea.

Average Spend (USD)*

Old Players New Players



You can view the full report [here](#).

The majority of the players in the examined markets prefer ad-supported monetization models

Surveys in the US, UK, S. Korea, and Germany showed that most gamers prefer free-to-play and ad-supported games over other monetization models.

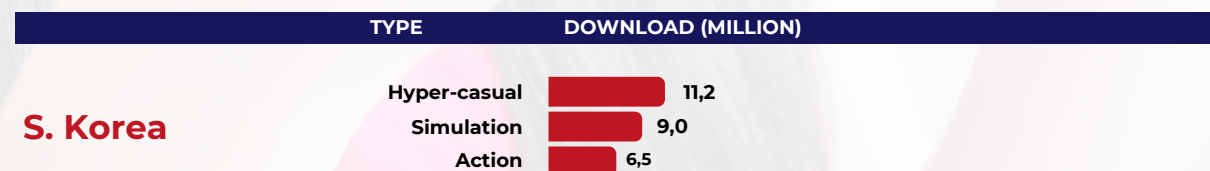
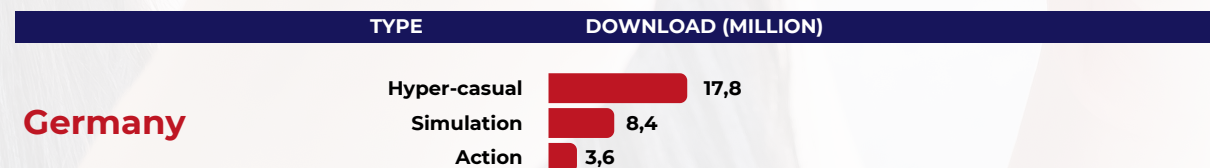
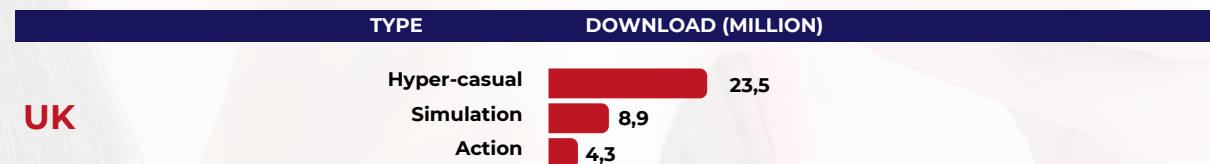
Monetization Model Preference	Old players		New players		USA		UK		Germany		S. Korea	
Ad-supported models	43%	43%	51%	49%	43%	46%	32%	42%				
Game purchase (ad-free)	15%	15%	16%	18%	18%	16%	16%	13%				
Free-to-play with in-app purchases	18%	15%	16%	13%	15%	16%	22%	21%				
Battle pass	17%	18%	12%	14%	16%	16%	19%	16%				
Monthly fee for game bundles	6%	10%	5%	7%	9%	6%	11%	8%				

You can view the full report [here](#).

Preferred game types by country

The hyper-casual game genre remains the most popular genre in the researched countries. The ranking in other game types varies according to the game culture of the players in the market. After hyper-casual, genres such as simulation, RPG (role-playing), puzzle, and action are frequently preferred.

Preferred Species Overview



You can view the full report [here](#).

According to data from AppMagic, Google is the largest publisher with over **200 million** monthly downloads. Although the net downloads of other app publishers in the top 10 cannot be determined, all of them are over **50 million**.

Top Companies by download

1. Google LLC
2. Outfit7 Limited
3. Meta Platforms, Inc.
4. VODOO
5. Crazy Labs by TabTale
6. AZUR GAMES
7. Supersonic Studios LTD
8. Lion Studios
9. SayGames Ltd
10. ABI Global LTD

You can view the full list [here](#).

The list changes a bit when it comes to the top-earning publishers. Chinese game publisher Tencent ranks first with **\$500 million**. In the top 10 of the list many famous names such as NetEase, miHoYo Games, and Playrix.

Top Companies by revenue

1. Tencent Mobile Games
2. Beijing Microlive
3. NetEase
4. Google LLC
5. miHoYo Games
6. Playrix
7. NCSOFT
8. King
9. Cygames, Inc.
10. Supercell

The list of companies with the highest income includes many Chinese companies.

You can view the full list [here](#).

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