



# ***MONTHLY MOBILE GAME INDUSTRY REPORT***

April 2022

**MOBiDiCTUM**



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# INDUSTRY REPORTS





- Mobile game developers are coming up with new monetization alternatives. They take advantage of meta elements to increase player retention and the game's attractiveness. They are regularly adding new features to their games to increase engagement and lower CPIs.
- All 100 of the top-grossing iOS games in the US over the past two years use renovation items.
- Meta items are now an essential part of successful casual games. 70% of the top 100 grossing iOS games in the US contain meta items.
- Renovation and construction properties are among the most popular meta items. 49% of the top 100 grossing iOS Match 3 games in the US have construction elements. This rate was only 7% last year.
- Mini-games and special game modes built into the game are seen more frequently in casual titles. Thus, other players are also addressed in addition to the players who love the main game.
- Social features and community-building elements are also being integrated into traditional single-player games. Thus, a player playing a single-player game can also enter a social environment if they wish. These social features also create a competitive environment, especially in Match 3 games. These features are used to develop a more attractive game for players who like to compete with others.

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



## The Top 10 Grossing Casual Games Between The Fourth Quarter of 2020 and The Fourth quarter of 2021

Between the fourth quarter of 2020 and the fourth quarter of 2021, the top three spots for the top-grossing casual games in the US (iOS) remain unchanged. On the other hand, there are some significant changes toward the bottom of the list.

Games such as Roblox, Pokémon GO, and Homescapes rank high on the list. It's remarkable to see an increased growth rate for Match 3 games on this list. The use of the meta elements mentioned earlier plays an important role in this increase.

1. Roblox
2. Candy Crush Saga
3. Pokémon GO
4. Royal Match
5. Homescapes
6. Toy Blast
7. Gardenscapes
8. Project Makeover
9. Candy Crush Soda Saga
10. Fishdom

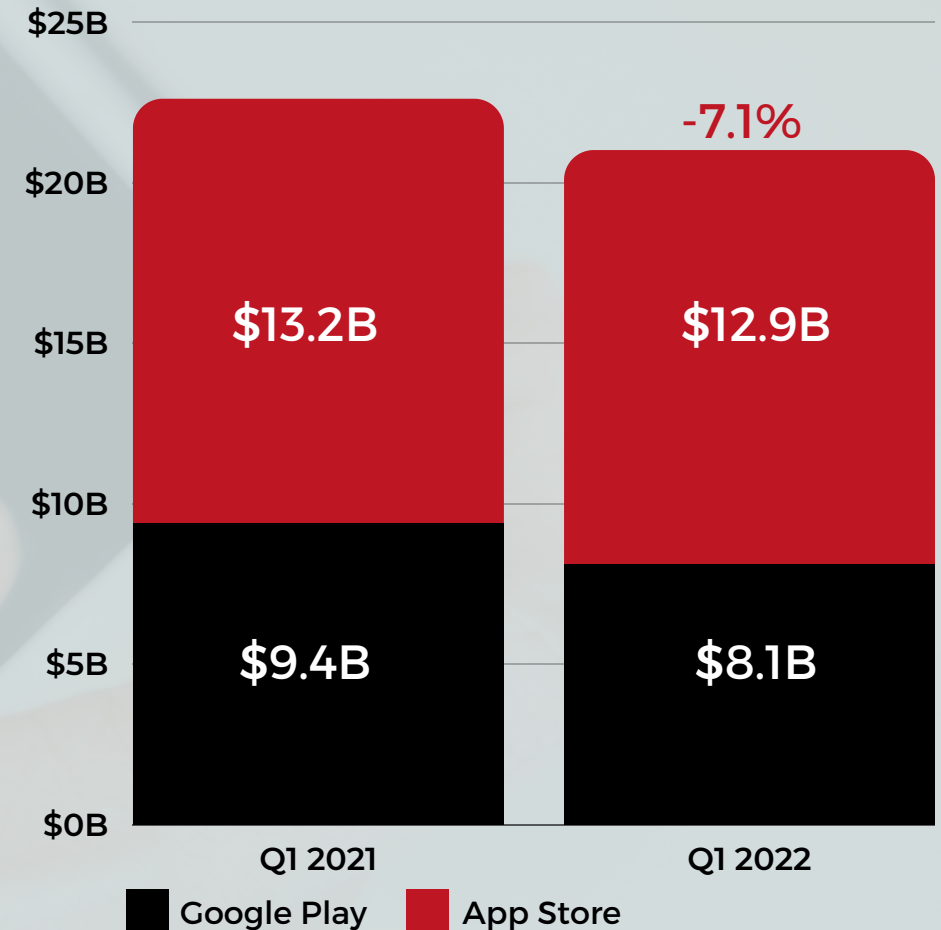
You can view the full report [here](#).

# Spending on Mobile Games in The First Quarter of 2022

Sensor Tower has released its first-quarter 2022 report. According to the report, user spending for mobile games fell 7.1% year-over-year, down to \$21 billion.

Expenditures for mobile games were evaluated separately for Google Play and App Store. A year-over-year decline was detected on both platforms. Mobile game revenues on Google Play fell 13.8% year-over-year to \$8.1 billion. In the App Store, consumer spending on mobile games decreased by 2.3% to \$12.9 billion.

Global consumer Spending in Mobile Games for Q1 2022



Estimated spending on the App Store and Google Play between Jan. 1 and Mar. 31, 2022.

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

## Highest Grossing Games in the First Quarter

The highest-grossing game in the first quarter of 2022 was Honor of Kings, with \$735.4 million. PUBG Mobile was second with \$643 million, and Genshin Impact was third with \$551 million. These three games are also the top three grossing games on the App Store.

### Top-grossing games overall

1. Honor of Kings
2. PUBG Mobile
3. Genshin Impact
4. Roblox
5. Candy Crush Saga
6. Lineage W
7. Coin Master
8. Uma Musume
9. 3 Kingdoms Tactics
10. Garena Free Fire

### Top-grossing games on the App Store

1. Honor of Kings
2. PUBG Mobile
3. Genshin Impact
4. Roblox
5. 3 Kingdoms Tactics
6. Candy Crush Saga
7. Fantasy WW Journey
8. Uma Musume
9. Monster Strike
10. Rise of Kingdoms

### Top-grossing games on Google Play

1. Lineage W
2. Coin Master
3. Candy Crush Saga
4. Genshin Impact
5. Garena Free Fire
6. Roblox
7. PUBG Mobile
8. Pokémon GO
9. Uma Musume
10. Lineage M

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



## Increases in Downloads of Mobile Games

While revenues for mobile games, in general, have decreased, the number of downloads has increased slightly. The download rate of games downloaded from Google Play for the first time increased by 2.5% to 12.1 billion. The number of downloads, which was 2.3 billion, remained stable on the App Store.

### Games by highest total downloads

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

### Games by number of downloads in the App Store

1. Subway Surfers
2. Wordle
3. Coloring Match
4. PUBG Mobile
5. Roblox
6. Coin Masters
7. Honor of Kings
8. Clash Royale
9. Call of Duty: Mobile
10. 8 Ball Pool

### Games by number of downloads on Google Play

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











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

## Top 10 Hyper-casual Games of Q1 2022

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In the fourth quarter of 2021, hyper-casual games collected 4.58 billion downloads in total. In the first quarter of 2022, the market shrank 8.3% to 4.2 billion downloads.

### Top 10 Hyper-casual games by Downloads

	Meerge Master - Dinosaur Fusion	51,438,376
	Count Masters - Stickman Clash	41,914,534
	Race Master 3D - Car Racing	41,825,833
	Find the Alien	36,961,381
	Paper Fold	32,242,844
	Going Balls	29,565,929
	Color Match	29,370,782
	Tiles Hop: EDM Rush!	28,343,560
	Hair Challenge	27,475,004
	Money Rush	26,409,659

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

## Mobile Advertising Costs

According to Liftoff's data, "playable ads" were the most affordable type of mobile ad, with a CPI of \$1.98. The average cost of in-game ad types was announced as \$3.79.

Advertising cost on Android is quite low compared to iOS. The playable ad cost was \$1.41 on Android and \$3.66 on iOS.

The cost of native and banner ads is relatively high. The average cost of ad types other than playable ads is \$4.82 on Android and \$7.38 on iOS.

One of the critical factors affecting advertising costs is player motivations. Correctly targeted ads that appeal to player motivations get more engagement and lower CPI.

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



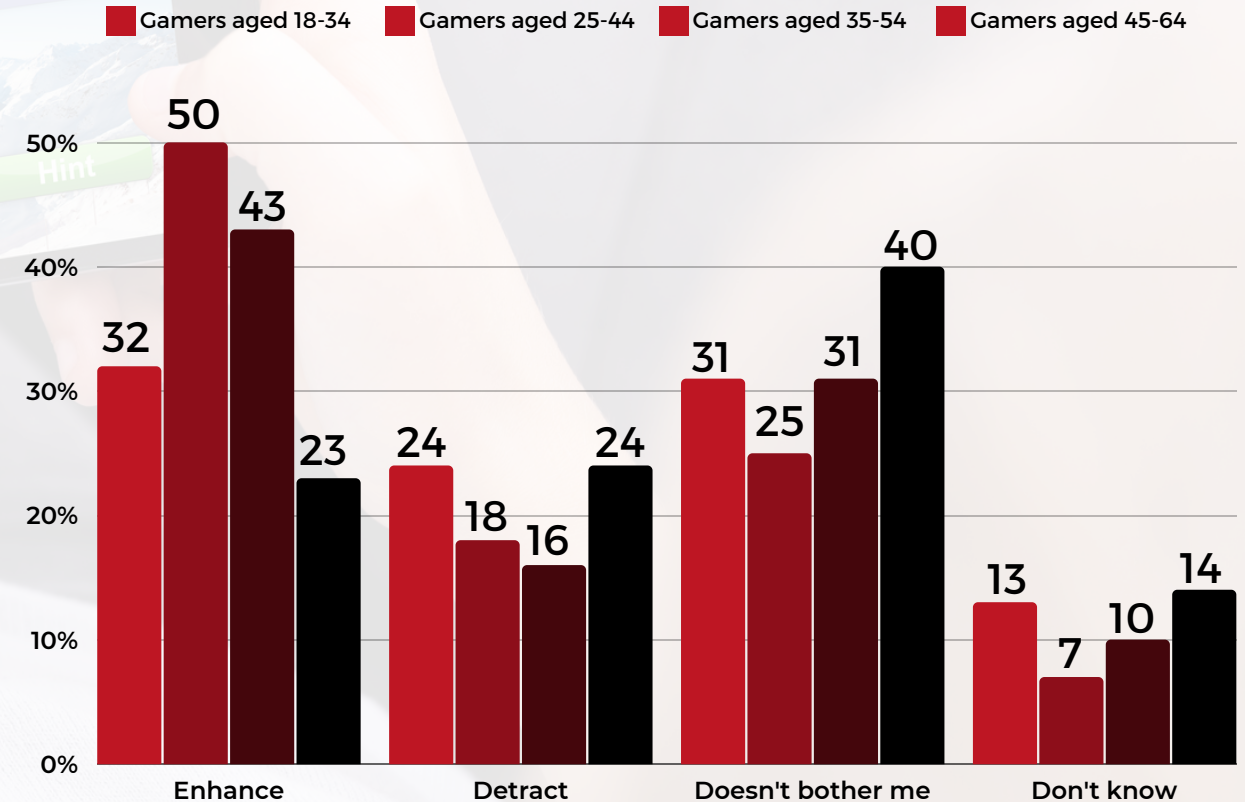
## US Players' In-Game Ad Attitude



Anzu researched a group of American actors. According to the research results, 75% of the players approach the in-game ads positively or neutrally.

50% of the players participating in the survey aged 25 to 44 view in-game ads as “enhancing the gaming experience.” This age group also makes up most advertisers’ main target audience. 78% of players aged 25-44 say it’s okay to see more ads in games.

On the other hand, per these players, these ads shouldn't be “annoying.” Advertisements that harm the game experience, the ones that are incompatible with the game’s theme, or are irrelevant aren't welcomed by players.



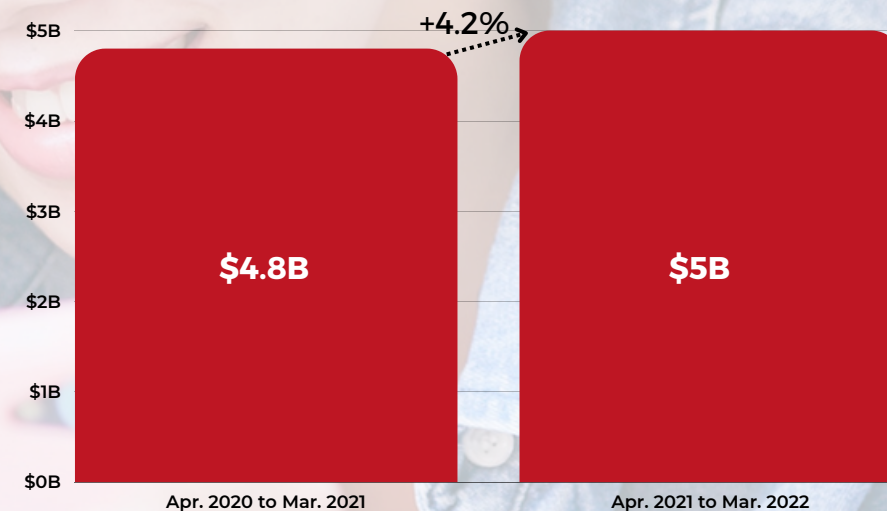
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# US Mobile Puzzle Game Market is Growing

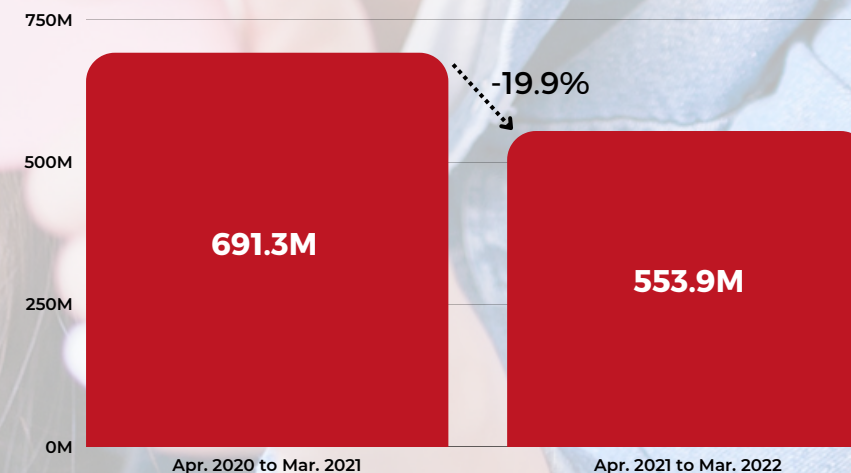
The revenues of puzzle games in the USA increased by 4.2% year on year, reaching \$5 billion. From April 1, 2021, to March 31, 2022, the top-grossing game in the US was King's Candy Crush Saga, with \$845.5 million. Playrix's Homescapes was in second place, and Candy Crush Soda Saga from King was third.

While puzzle game revenues increased, the number of downloads decreased. Games in the US puzzle game market were downloaded 554 million times, down 19.9% yearly. The most downloaded game throughout the year was Project Makeover from Magic Tavern, with 14.5 million downloads. Wordscapes from PeopleFun took second place, and Candy Crush Saga placed third.

**U.S. Mobile Puzzle Game Spending: Apr. 2021 to Mar. 2022**



**U.S. Mobile Puzzle Game Downloads: Apr. 2021 to Mar. 2022**



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



## Top Publisher Companies (2022)

The list of the best publishers includes a high number of companies from the Far East, especially from China. There are also four US-based participants on the list.

1	Tencent	China	Zynga	USA
	NetEase	China	ByteDance	China
	Activision Blizzard	USA	Playtika	Israel
	Playrix	Ireland	Match Group	USA
	Google	USA	10	Netmarble
				South Korea

*Important notice: The revenues, downloads, investments, etc., of the companies in the list may change instantly. For this reason, companies are listed on the “average score” based on data.ai data, and the list is subject to change.*

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



# EMEA Top 10 Publisher Companies

1

Playrix	Ireland	Huuuge Games	Poland
Playtika	Israel	Nexters	Cyprus
Moon Active	Israel	Dream Games	Turkey
Stillfront	Sweden	Rovio Entertainment	Finland
VK	Russia	ProSiebenSat.1 Media	Germany

10

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

# APAC Top 10 Publisher Companies

1

Tencent

China

NetEase

China

ByteDance

China

Netmarble

South Korea

CyberAgent

Japan

miHoYo

China

Aristocrat

Australia

BANDAI NAMCO

Japan

Lilith

China

Sony

Japan

10

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

# AMER Top 10 Publisher Companies

1	Activision Blizzard	USA	Disney	USA
	Google	USA	AppLovin	USA
	Zynga	USA	AT&T	USA
	Match Group	USA	Niantic	USA
	Roblox	USA	Scopely	USA
10				

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



# Hyper-casual Benchmark Report

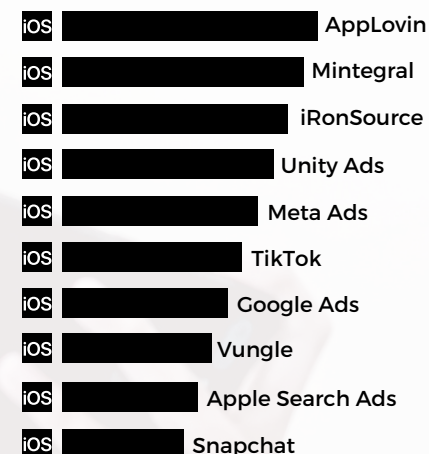
According to the infographic released by Tenjin, ad spending for iOS and Android is almost equal. On the other hand, AppLovin was the ad network with the highest ad spending on both platforms.

The countries with the highest ad spending on both platforms were the US and Japan. Great Britain is placed third for iOS, and Germany is in third place for Android.

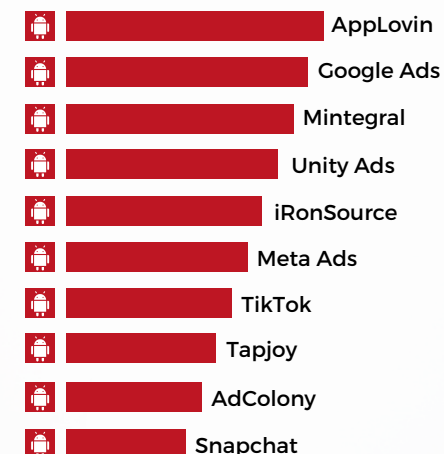
## Ad Spend distribution



## iOS - Top Ad networks by ad spend



## Android - Top Ad networks by ad spend



## Top spend ad networks

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

# Hyper-casual Benchmark Report

Hyper-casual game retentions on iOS and Android are quite close to one another, but the retention values of iOS are ahead by a small margin.

Retention benchmark

GameAnalytics

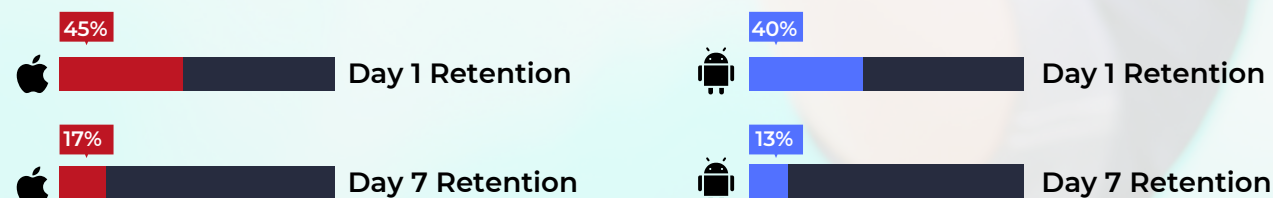
Median of all games



Top 25% of games



Top 2% of games



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

# Video Game Trends and Live Streaming Report: Q1 2022

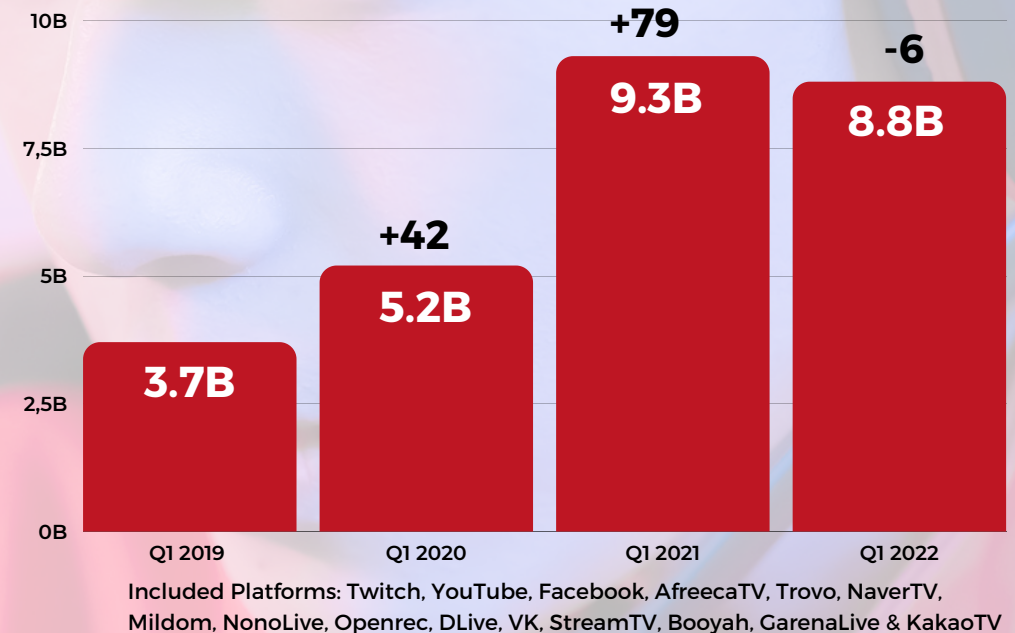
The growth rate of video game live streams achieved due to lockdowns from the Covid-19 pandemic has begun to stabilize: Hours watched decreased 7% this year compared to Q1 2021.

This decrease in hours watched may be partially impacted by creator fatigue: The average amount of channels broadcasting at any given moment during Q1 2022 decreased by nearly 13% from the same period in 2021.

Despite the noticeable decrease, video game streaming viewership has sustained as a pop culture phenomenon: Q1 2022 total hours watched is up 134% relative to the Q1 2019 period.

## Combined Live Video Game Streaming Viewership Trends

Total hours watched across all platforms | Q1 2022



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



# Video Game Streaming Platform Market Share

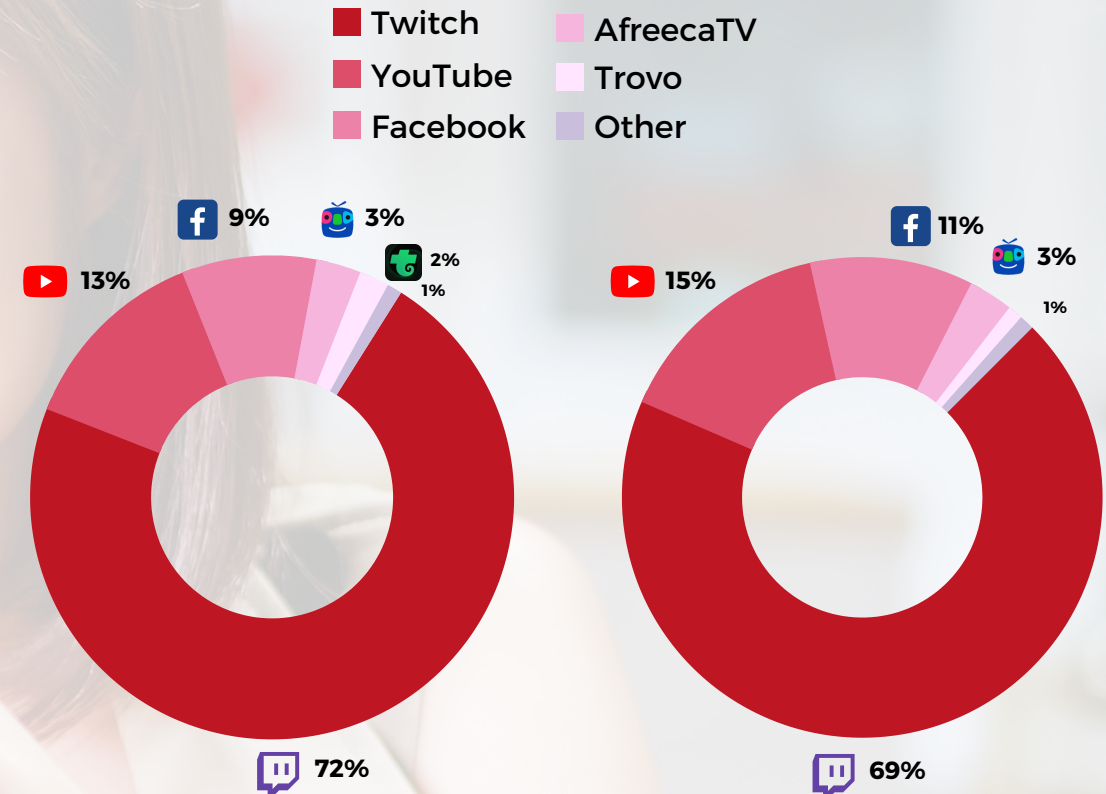
Twitch continues to hold the lion's share of the streaming market, generating nearly 3/4 of the total hours watched.

AfreecaTV, a South Korean live streaming platform, has increased its share significantly relative to last year. In Q1 2022, hours watched grew 5%, totaling 286M hours.

The platforms with the most significant growth from last year are Trovo, the Tencent live streaming platform, and Naver TV, a South Korean live streaming platform. Trovo grew 188% to 136M hours watched, and Naver TV grew 141% to 47M hours watched.

## Video Game Streaming Platform Market Share

Total Hours Watched Across All Platforms | Q1 2021- Q1 2022



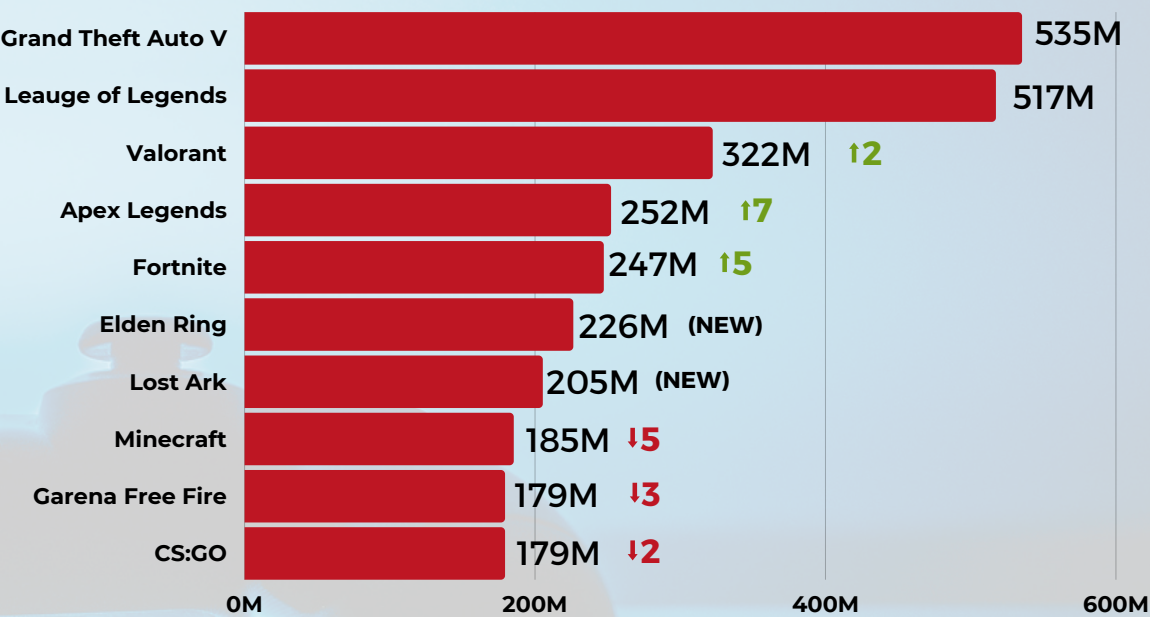
You can view the full report [here](#).

# Most Watched Games

Strong game launches from Elden Ring & Lost Ark have propelled both titles into the top 10. Lost Ark's North American release helped it garner a total of 205M hours watched this quarter. Elden Ring launched just one month before the end of the quarter and was still able to place 6th in the most-watched titles this quarter.

This quarter, mobile game streaming has fallen in popularity; only one game, Garena Free Fire, cracked the top ten. The 2nd most-watched Mobile title, PUBG Mobile, was banned in India, which may have contributed to a 48% drop in hours watched this quarter.

Top Games Q1 2022 & Rank Change Vs Q4 2021



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

# MONTHLY MOBILE GAME INDUSTRY REPORT

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## CONTRIBUTORS



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