

# **MONTHLY MOBILE GAME INDUSTRY REPORT**

**June 2022**

**MOBIDICTUM**



# MOBIDICTUM

## BUSINESS CONFERENCE



September 5-6, 2022



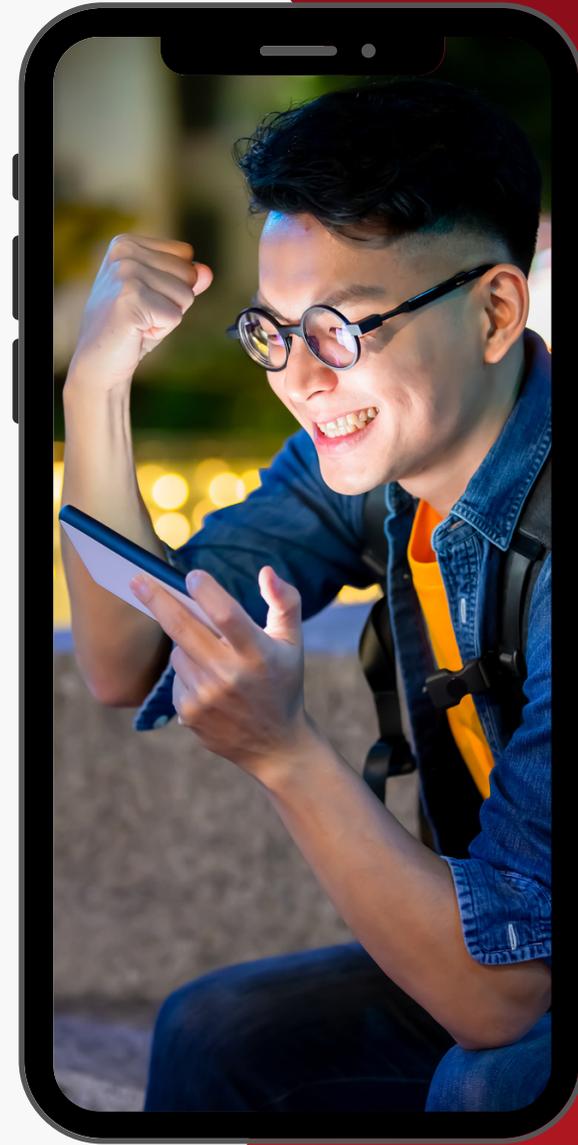
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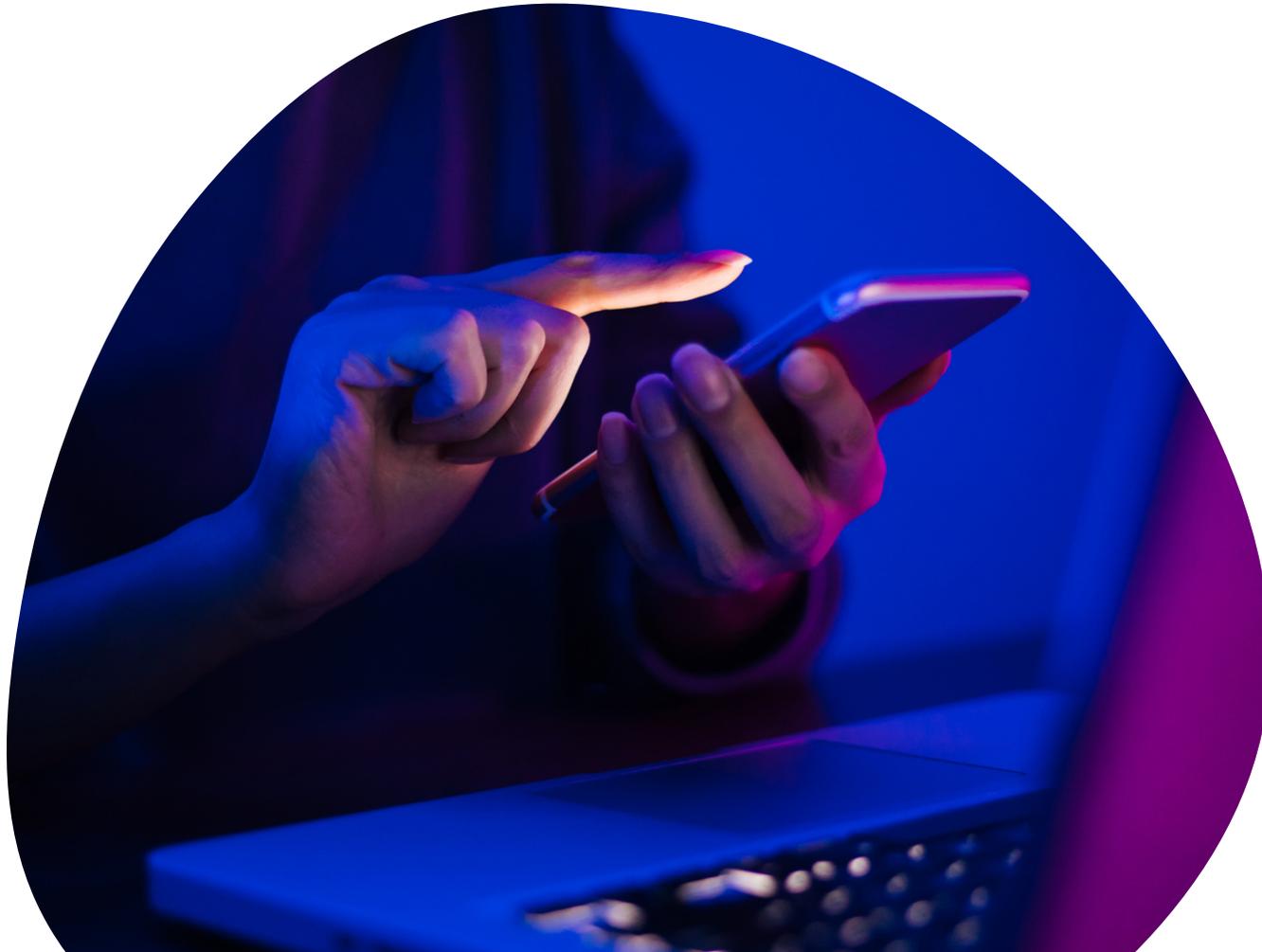


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# INDUSTRY REPORTS



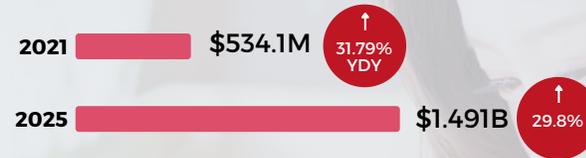
# World's Fastest Growing Game Market: India

Nearly 1.4 billion people live in India according to official numbers, and per SocialPeta's reliable data 0.9 billion of them are young people with a high potential to become users. The size of the Indian gaming market is reported as 136 billion rupees (about \$1.8 billion). Although this number seems slightly lower than some of the other major countries, India is growing much faster than its rivals.

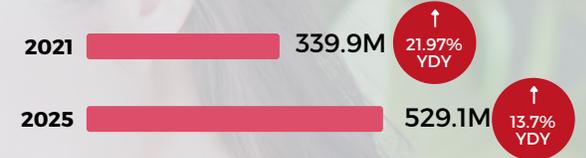
Simulation, action, and sports games make up India's three most popular game genres. Simulation games hold the lead with 23%, followed by action with 14%, and sports with 11%.

## INDIA'S VIDEO GAMES MARKET

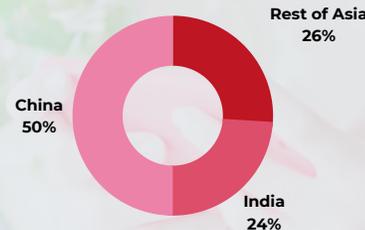
### PC & MOBILE GAME REVENUE (USD)



### PC & MOBILE GAMERS



### INDIA VS ASIA BY GAMERS



### INDIA VS WORLD BY GAMERS



### FASTEST GROWING MARKET IN ASIA



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

# Popular mobile games in the Indian market, revenues and downloads

Ludo King has long been the most popular game in the Indian market. Battlegrounds Mobile India, Subway Surfers, and Temple Run 2 also top the list of most downloaded games.

Candy Crush Saga from King is at the top of the list of games that generate the most revenue. It is followed by Clash of Clans and Age of Origins.

Indian Mobile Game Revenue And Download Top 10 | March 2022

App Store Revenue				App Store Download			
Rank	APP	Total Revenue	环比变化	Rank	APP	Total Download	MoM
1	 <b>Candy Crush Saga</b> King	1.5M	51.9% ▼	1	 <b>Ludo King</b> Gametion	237.5K	51.8% ▲
2	 <b>Clash of Clans</b> Supercell	709.9K	30.6% ▲	2	 <b>BATTLEGROUND'S MOBILE INDIA</b> KRAFTON	188K	33.1% ▼
3	 <b>Age of Origins</b> Hong Kong Ke Mo	483.1K	1000%+ ▲	3	 <b>1xBet MoM</b> 1XC Corp	108.7K	82.9%+ ▲
4	 <b>eFootball PES 2021</b> KONAMI	456.8K	141.1% ▲	4	 <b>Subway Surfers</b> Sybo Games	101.6K	46.4%+ ▲
5	 <b>Roblox</b> Roblox	348.1K	26.8% ▲	5	 <b>Temple Run 2</b> Imangi Studios	82.5K	80.9% ▲
6	 <b>Evony</b> TOP GAMES	334K	21.8% ▲	6	 <b>Slap And Run</b> Voodoo	73.1K	NEW
7	 <b>The Ants</b> ChengDu Starunion	321.3K	8.4% ▲	7	 <b>WinZO Games</b> TICTOK SKILL GAMES	71K	136.7% ▲
8	 <b>Candy Crush Soda Saga</b> King	246K	14.1% ▲	8	 <b>Dr. Driving</b> SUD	68K	53.3% ▲
9	 <b>State of Survival</b> FunPlus	221.1K	54.8% ▼	9	 <b>Candy Crush Saga</b> King	66.1K	17.7% ▲
10	 <b>BATTLEGROUND'S MOBILE INDIA</b> KRAFTON	198.6K	39.1% ▲	10	 <b>Ludo Supreme Gold</b> Cashgrail Private Limited	66K	NEW

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

## Mobile Gaming Market Insights for 2022



- Since the pandemic-related restrictions are being lifted and the world is going "back to normal", the video games market has proven that its strength does not depend on lockdowns. Gaming revenues are still growing in 2022. By the end of the year, the revenue generated through consumer spending is expected to reach \$203.1 billion, an annual increase of 5.4%.
- According to the market analysis by Newzoo, there will be a big increase in the number of players. By the end of 2022, global players are expected to reach 3.09 billion.

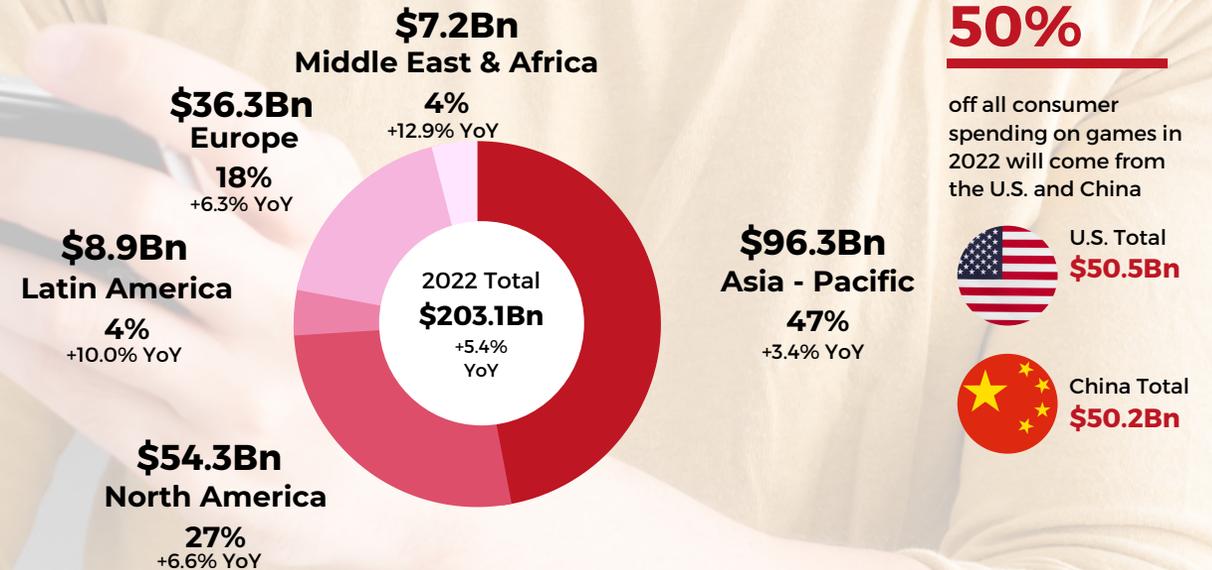
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# Game Revenues by Regions

- According to projections, in terms of gaming revenues from consumer spending, the US (\$50.5 billion) will generate more revenue than China (\$50.2 billion) in 2022.
- Considering the Chinese government's sanctions on the game industry and new games and limiting the playtime of young people in the country, this should be a somewhat expected outcome.
- Asia-Pacific will remain by far the largest region in terms of income.
- More developed European and Northern American regions are showing strong growth thanks to the PC and console performance. Still, it looks like the mobile will continue to generate more revenue than the sum of these two platforms in 2022.

## 2022 Global Games Market

Per Region With Year-on-Year Growth Rates



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

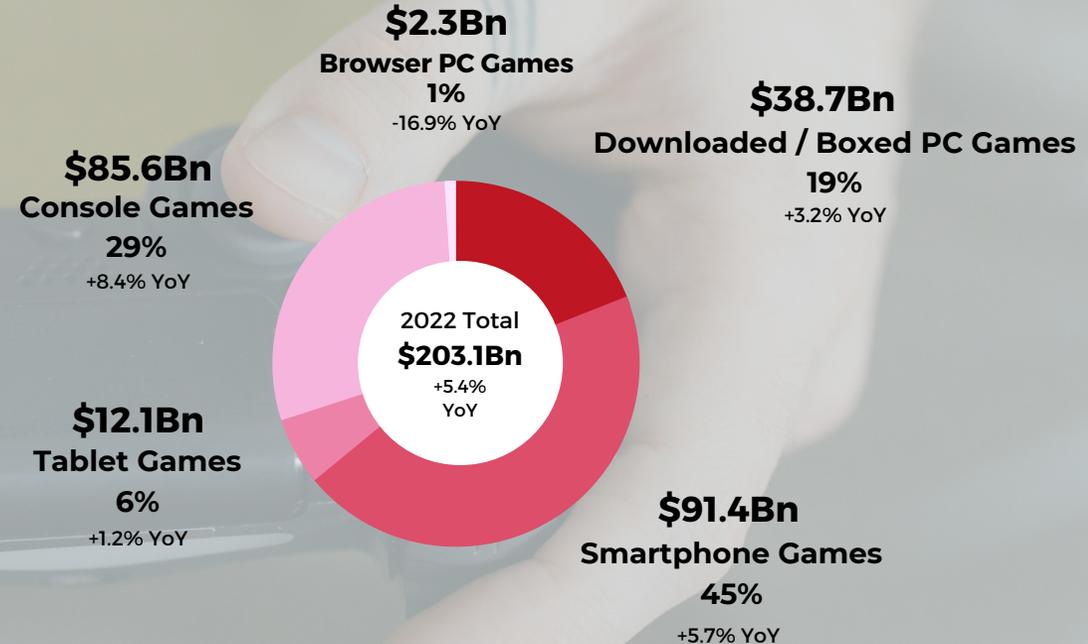
# Comparison of Mobile, Console and PC Gaming Industries



- Annual mobile game revenues will exceed \$100 billion for the first time in 2022 and will reach \$103.5 billion, increasing by 5.1% year-on-year.
- The effects of the pandemic-induced growth in the mobile games market are fading. The market share of mobile games, which alone accounted for 52% of all game revenues last year, is down one point to 51%. This decline is likely to continue for a while.
- Console game revenues will grow 8.4% annually to \$58.6 billion in 2022.
- PC games show a more modest growth compared to consoles. The industry is expected to reach \$41.0 billion during the year, up by 1.9%.

## 2022 Global Games Market

Per Segment With Year-on-Year Growth Rates



**\$103.5Bn**

Mobile game revenues in 2022 will account for 51% of the global market.

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

# Game industry revenues to reach \$222.6 billion by 2024



The global game market is expected to continue to grow steadily in the coming years. Studies covering the years 2020-2024 indicate that the industry will grow by 5.6% in this process and reach 222.6 billion dollars.

## Global Games Market Forecast

Forecast Toward 2024

\$250Bn

\$200Bn

\$150Bn

\$100Bn

\$50Bn

\$0Bn

2020

2021

2022

2024

**+5.6%**

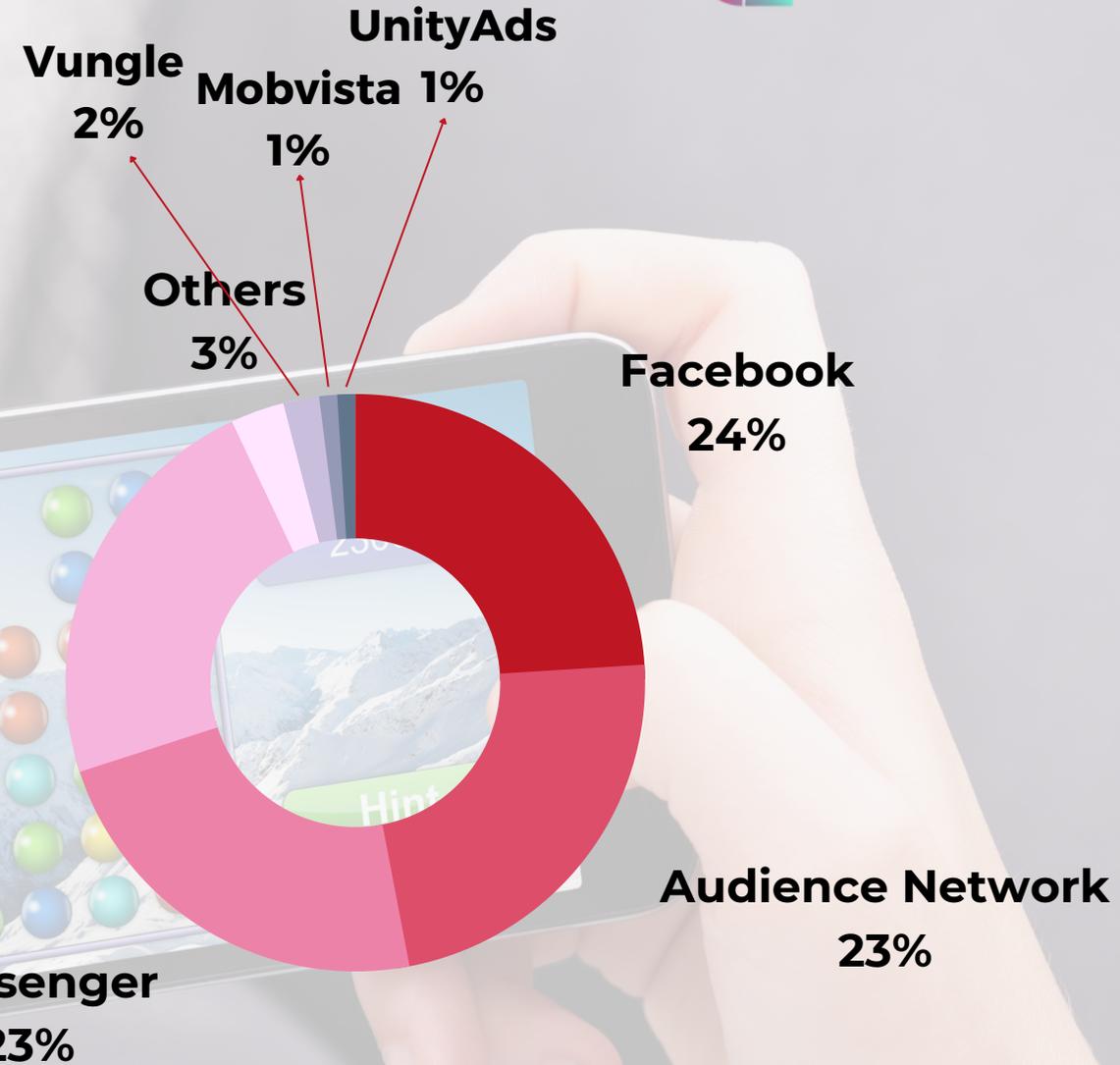
Total Market CAGR  
2020 - 2024

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

## Top Mobile Game Advertising Platforms

Ads are the key factors that directly affect mobile game revenues.

According to data provided by SocialPeta, Facebook, Audience Network, Messenger, and Instagram are the leading ad platforms, with over 23% creatives each. Other platforms make up only 7% of mobile game advertising.



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

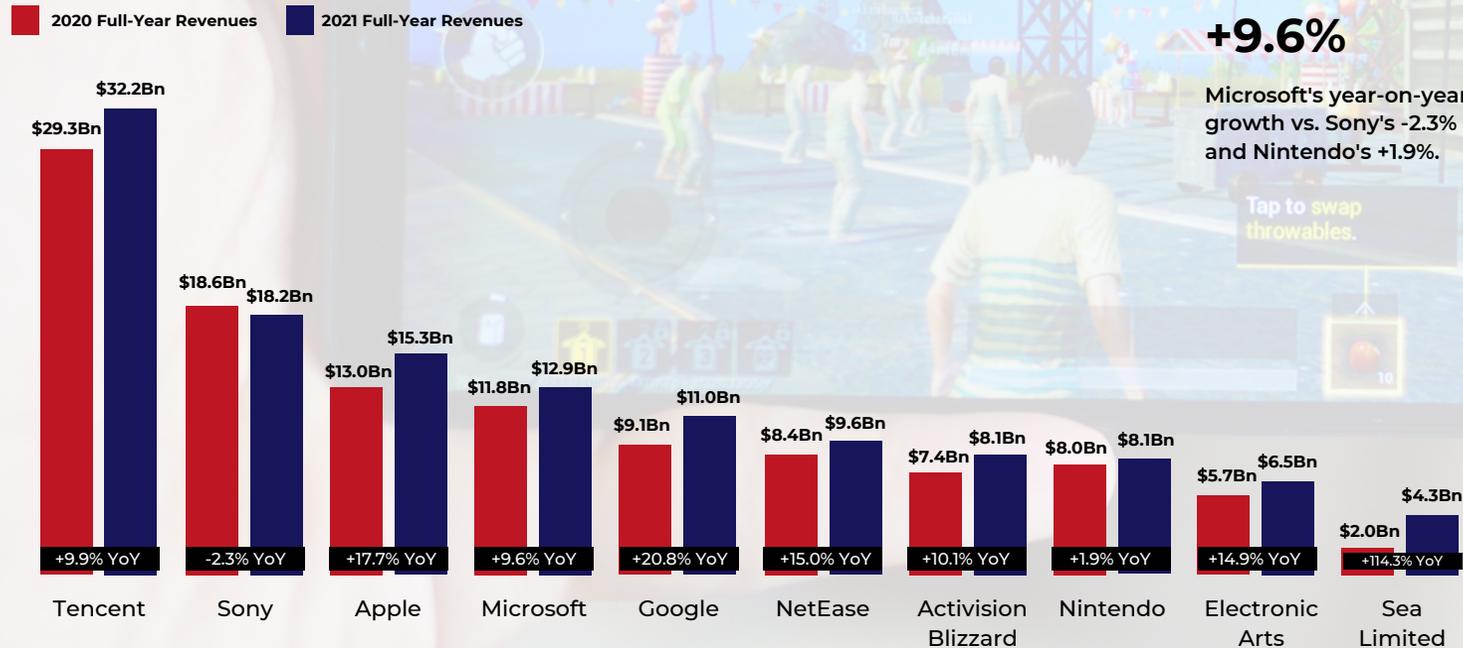
# Top 10 Gaming Companies and Their Revenues



In 2021, the game industry generated \$ 192.7 billion in revenue. The top 10 video game companies provided \$126 billion (65.3%) of this revenue. While Tencent maintains its title as the world's most revenue-generating video game company, Microsoft has made a significant breakthrough with its recent acquisitions and the Xbox Game Pass system. Year-over-year revenue growth was observed for all gaming-related publicly traded firms except Sony.

## Top 10 Public Companies by Game Revenues

Comparing 2020 and 2021



Microsoft  
**+9.6%**  
 Microsoft's year-on-year growth vs. Sony's -2.3% and Nintendo's +1.9%.

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

# Global Mobile Gaming Statistics: Revenue

Genshin Impact seems to be recovering from the loss of income it has experienced in the past period. The game generated \$ 66.5 million in revenue in April, an increase of 7% compared to the previous month. However, in SocialPeta's view, the game's revenues will begin to decline by early summer again.

Also, Roblox's revenue continues to decline. Roblox revenues fell to \$70.5 million in April, a massive drop of 21.2% compared to the previous month.

## Global Mobile Game Revenue TOP 10 | April 2022

### App Store

### Google Play

Rank	APP	Revenue (\$)	MoM	Rank	APP	Revenue (\$)	MoM
1	 <b>Candy Crush Saga</b> King	43.4M	10.2%▲	1	 <b>Coin Master</b> Moon Active	47.2M	7.5%▲
2	 <b>Roblox</b> Roblox	42.3M	21.2%▼	2	 <b>Candy Crush Saga</b> King	37.9M	9.2%▲
3	 <b>Genshin Impact</b> miHoYo	36.2M	2.7%▼	3	 <b>Uma Musume: Pretty Derby</b> Cygames	37.8M	14.7%▼
4	 <b>PUBG MOBILE</b> Tencent Games&KRAFTON	32.3M	3.9%▲	4	 <b>Lineage W</b> NCSOFT	34.1M	29.7%▼
5	 <b>Homescapes</b> Playrix	27.7M	6.1%▼	5	 <b>Genshin Impact</b> miHoYo	30.3M	22.7%▲
6	 <b>Clash of Clans</b> Supercell	26.1M	2%▲	6	 <b>Lineage M</b> NCSOFT	28.6M	84.5%▲
7	 <b>Pro Baseball Spirits A</b> KONAMI	25.8M	65.4%▲	7	 <b>Roblox</b> Roblox	28.5M	2.9%▲
8	 <b>Royal Match</b> Dream Games	24M	8.1%▲	8	 <b>Fate/Grand Order</b> Aniplex	23.3M	156%▲
9	 <b>Monster Strike</b> XFLAG	23.6M	4.8%▼	9	 <b>State of Survival</b> FunPlus	22M	47.7%▲
10	 <b>Pokémon GO</b> Niantic	22.2M	5.7%▲	10	 <b>Gardenscapes</b> Playrix	20.8M	5.9%▼

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

# Global Mobile Game Statistics: Downloads

First on the list of global downloads was Subway Surfers for both iOS and Android. In April, the game reached 5.5 million downloads with an increase of 17% in the App Store compared to the previous month, and 18.7 million downloads in Google Play with 20.6%.

Published by Rollic Games, Fill The Fridge! managed to keep the second place in the App Store list with 3.4 million downloads, even though it saw a decrease of 17.1% compared to March. The reason why the number of downloads fluctuates is thought to be related to the game's variable advertising strategy.

The download numbers on the App Store seem to be more stable compared to Google Play. The highest growth was seen in Miniclip's simulation game Carrom Pool. The game reached 1.08 million downloads, showing a 25.6% growth compared to the previous month. The biggest drop was seen in Merge Master, the arcade game of Homa Games. The game achieved 1.2 million downloads, a decrease of 51.4% compared to the previous month.

## Global Mobile Game Download TOP 10 | April 2022

### App Store

### Google Play

Rank	APP	Downloads	MoM	Rank	APP	Downloads	MoM
1	 <b>Subway Surfers</b> Sybo Games	5.5M	17% ▲	1	 <b>Subway Surfers</b> Sybo Games	18.7M	20.6% ▲
2	 <b>Fill The Fridge!</b> Rollic Games	3.4M	17.1% ▼	2	 <b>Ludo King™</b> Gametion	15.9M	21.4% ▲
3	 <b>Roblox</b> Roblox	3.1M	3.1% ▼	3	 <b>DOP 4</b> SayGames	12.6M	15.6% ▲
4	 <b>Fishdom</b> Playrix	3.1M	14.8% ▲	4	 <b>Candy Crush Saga</b> King	12.1M	8% ▲
5	 <b>Wordle!</b> Goldfinch Studios	2.9M	25.6% ▼	5	 <b>Merge Master</b> HOMA GAMES	12M	51.4% ▼
6	 <b>8 Ball Pool™</b> Miniclip.com	2.8M	=	6	 <b>Garena Free Fire MAX</b> Garena	11.5M	1.7% ▼
7	 <b>Coloring Match</b> SUPERSONIC	2.5M	21.9% ▼	7	 <b>Carrom Pool</b> Miniclip	10.8M	25.6% ▲
8	 <b>Magic Tiles 3</b> Amanotes	2.2M	=	8	 <b>My Talking Tom Friends</b> Outfit7	10.3M	19.8% ▲
9	 <b>Count Masters</b> FreePlay	2.2M	15.4% ▼	9	 <b>Garena Free Fire</b> Garena	10M	22% ▲
10	 <b>Going Balls</b> SUPERSONIC	2.2M	22.2% ▲	10	 <b>Race Master 3D</b> SayGames	9.8M	14% ▲

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

# Global Mobile Gaming Statistics: Ads

AntWars, an ant-themed SLG game published by Eskyfun, managed to take first place in the iOS ad list. The game concentrated its ads in Hong Kong, Macau, and Taiwan regions. Since its official release on April 25, the game managed to top the list of free games on the App Store for four consecutive days.

The newly released Ragnarok Labyrinth NFT is the second NFT game to hit the chart after Trivia Blitz debuted in March. Although it is a new NFT game, it has many different categories. The company that released the game also developed a blockchain-based role-playing game called Ragnarok Online and focused its ads on Southeast Asia. This advertising strategy and the fact that it contains multiple categories made the game quickly attract attention.

Global Mobile Game Advertising TOP 10 | April 2022

iOS					Android				
Rank	APP	Deduped Ads	MoM	Rank	APP	Deduped Ads	MoM		
1	 蟻族奇兵AntWars ESKYFUN	3.8K	574.8%▲	1	 The Grand Mafia Yotta Games	7.7K	17.3%▲		
2	 Two Dots Playdots	3.1K	51.4%▲	2	 Mafia City Yotta Games	6.7K	3.1%▲		
3	 The Ants Star Union Gam	2.2K	17.4%▲	3	 Car Fix Tycoon SONOW	5.6K	7.7%▲		
4	 Fishdom Playrix	2.2K	21.4%▲	4	 Jackpot World™ BoleGaming	5.4K	19%▼		
5	 The Grand Mafia Yotta Games	1.9K	11%▲	5	 Kingdom Guard Tap4Fun	5.2K	22.3%▲		
6	 Evertale ZigZaGame	1.8K	192.6%▲	6	 Lords Mobile IGG	5.1K	3.8%▲		
7	 Ragnarok Labyrinth NFT Gravity Game Link	1.8K	284%▲	7	 Braindom Matchingham Games	4.8K	55.5%▲		
8	 Bricks Ball Crusher PoseidonGames	1.6K	41.2%▲	8	 Evony TG Inc.	4.8K	40%▲		
9	 AZUREA-空の唄- ZLONGAME	1.6K	41.1%▼	9	 Last Shelter IM30.NET	4.6K	92.8%▲		
10	 Kingdom Guard Tap4Fun	1.6K	76.5%▲	10	 Braindom 2 Matchingham Games	4.5K	9.3%▼		

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

# MONTHLY MOBILE GAME INDUSTRY REPORT

June 2022

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