

MONTHLY GAME INDUSTRY REPORT

August 2022

MOBiDiCTUM



MOBIDICTUM

BUSINESS CONFERENCE

Game Industry Conference



Sep 5-6, 2022



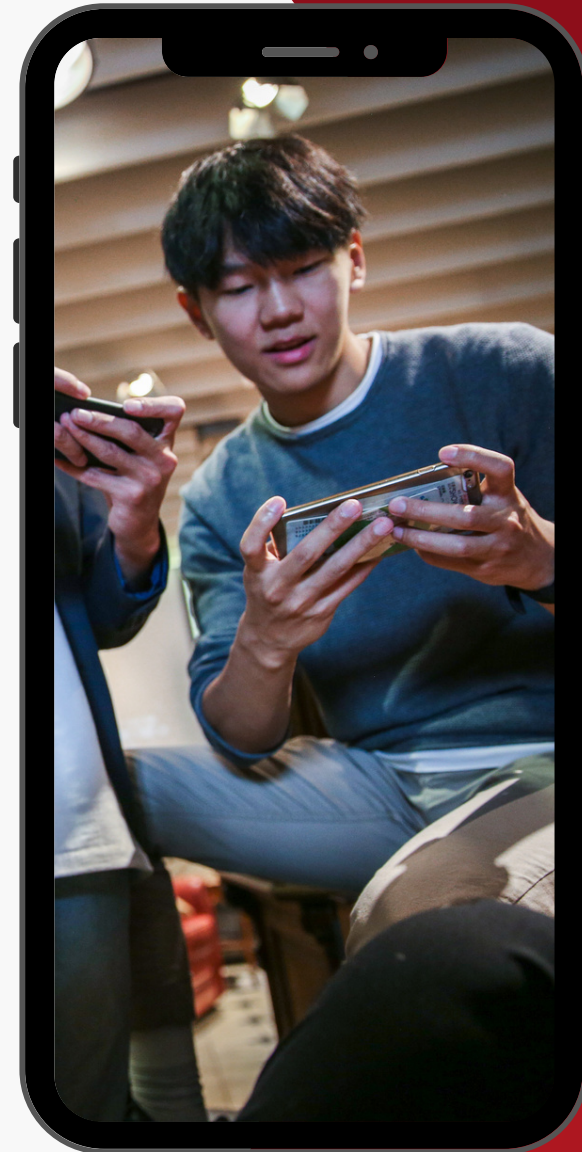
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INDUSTRY REPORTS



What happened in the mobile game market in June 2022?

The game Mirrorverse, released by Disney in the past weeks, achieved great success in the Japanese and US markets and became a finalist in the most promising soft-launch games category of the GameRefinery 2021 Mobile GameDev Awards. Disney will continue to compete with its rivals from many lanes.

Free Fire, the popular battle royale game developed by Garena, made a surprising move. The bomb disposal mode, found in many FPS games, has been added to the game under the 5v5 Bomb Squad. Rise of Kingdoms added Egypt as a new Faction and offered many events to users. Rise of Kingdoms' main event will consist of four episodes, including Words of Eternity.

Diablo Immortal, released globally last month, managed to become one of the top 10 grossing games in the USA. Although the game did not fully meet the expectations of some Blizzard fans, it made its debut without critical problems and managed to make itself popular. In addition, RPG games managed to dominate the list of 200 top-grossing games in all markets this month.

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

What happened in the mobile game market in June 2022?

A somewhat surprising partnership came from the Chinese market. The game, named Onmyoji Arena, partnered with the famous US-based beer company Bud Light and managed to be among the top 200 grossing games.

Battle of the Golden Spatula, the Chinese version of Teamfire Tactics, developed by Riot Games and carried to mobile devices recently, has started a new PvP season with many new heroes. Riot Games' games are in high demand in the Chinese market.

Project Sekai Colorful Stage feat. Hatsune Miku held the first Connect Live concert that the players could attend. Project Makeover and Redecor games created Pride-themed battle tickets to defend LGBT rights.

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

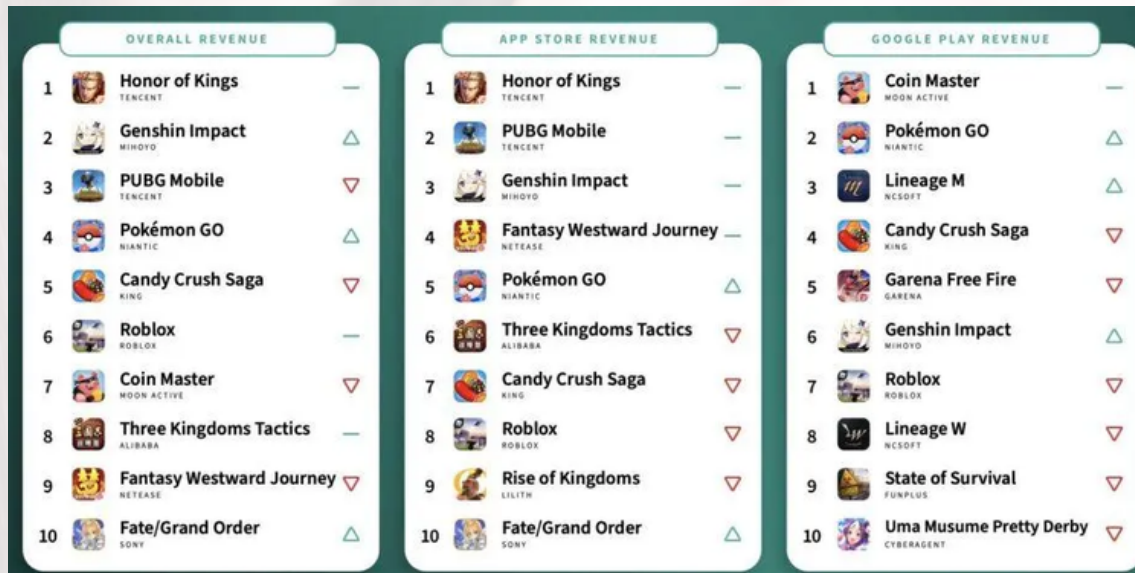
Highest earning mobile games of June 2022

While miHoYo's Genshin Impact finds a place across all three charts provided by Sensor Tower, the number one money-maker is Tencent's Honor of Kings, to no one's surprise. The highly-popular MOBA goes missing in Google Play's top 10 revenue chart but tops the App Store one, and this alone grants Honor of Kings the highest earning mobile game title.

Genshin Impacts seems to be in a recovery phase, climbing one step above in overall revenue and landing in second place. PUBG Mobile, another popular Tencent title, is placed third in overall revenue while keeping second place on Apple's App Store.

One interesting catch is Roblox's performance. Despite losing ground in both App Store and Google Play, Roblox managed to hold onto the sixth spot in June 2022. Niantic's Pokemon Go has also seen a rise across all charts.

Top Mobile Games by Worldwide Revenue for June 2022



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

Highest earning mobile games of June 2022

China alone keeps the boat floating for Tencent's Honor of Kings, which is to be published across the world via Tencent's new publishing division Level Infinite soon. Honor of Kings earned about \$238 million in player spending and nearly four percent of it came from Taiwan and Thailand.

According to Sensor Tower's data, the mobile games market has seen about \$6.4 billion in player spending across Apple and Google stores. The data provider says there's about a 10% decrease year-over-year. The US players generated the most revenue for the mobile games industry with \$1.8 billion, followed by Japan and China. However, Google Play isn't available in China, hence China's unexpected lower ranking.

While Honor of King and PUBG Mobile are making bank at home for the video game giant, the company still faces major issues in China as the government denies video game licenses to Tencent, and their rival NetEase.

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

Highest earning mobile games of June 2022



Pokemon Go had its ups and downs in 2022, but June 2022 proved to be a good month for Niantic, in fact, the best month of the year so far. Pokemon Go generated over \$110 million in June 2022, earning 58% more compared to may and nearly 12% more year-over-year.

The increase in revenue is expected though, as Pokemon Go Fest events are taking place all summer, the final one being on August 27. Niantic's popular augmented reality game may generate even more revenue in July and August compared to last month.

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

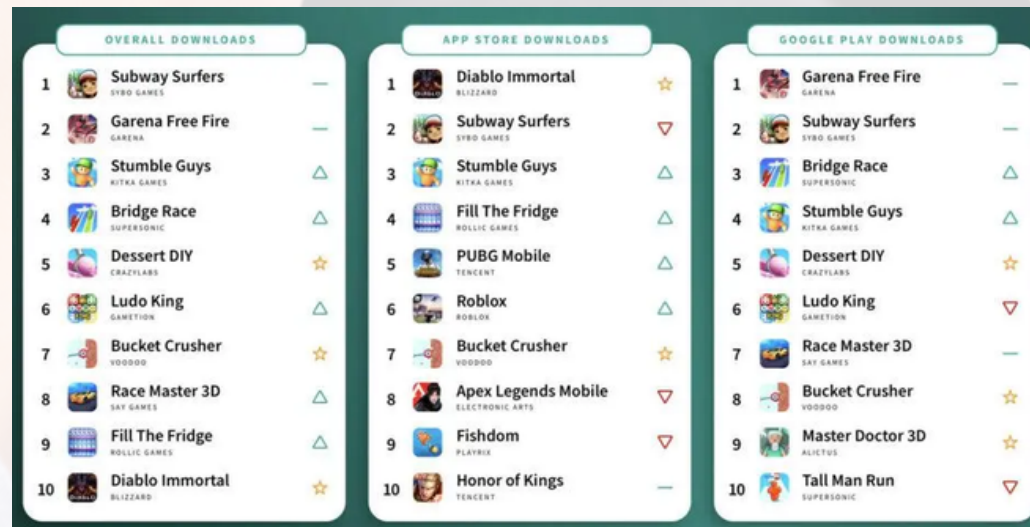
Most downloaded mobile games of June 2022

June has been an interesting month in regards to mobile game downloads. Despite the heavy criticism coming from longtime fans, Diablo Immortal was the most downloaded game on App Store.

The backlash of fans was and is a major handicap for the latest Diablo entry, but it's not the only one. The game had a rough time in China due to having a delayed lunch, and it didn't even release in the Netherlands and Belgium, because loot boxes are banned in these countries unless they meet certain regulations.

The charts show another interesting rise in Kitka Games' Stumble Guys. The Fall Guys clone has been around for some time, but only recently started to make waves. In its lifetime, Stumble Guys was downloaded over 160 million times and brought the company over \$21 million in revenue.

Top Mobile Games by Worldwide Revenue for June 2022



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

Haziran 2022'nin en çok indirilen mobil oyunları



Denmark-based SYBO's endless runner was the most downloaded mobile game across the world in June 2022 with over 26 million installs. The game saw a 63.5% increase in downloads compared to June 2021.

In the 30-day period, Subway Surfers was downloaded the most by Indian gamers with nearly 15%, followed by the United States at 10.2%. Sybo Games have been doing so well that Masomo's owner Miniclip decided to fully acquire the studio, adding the games of the developer to its portfolio.

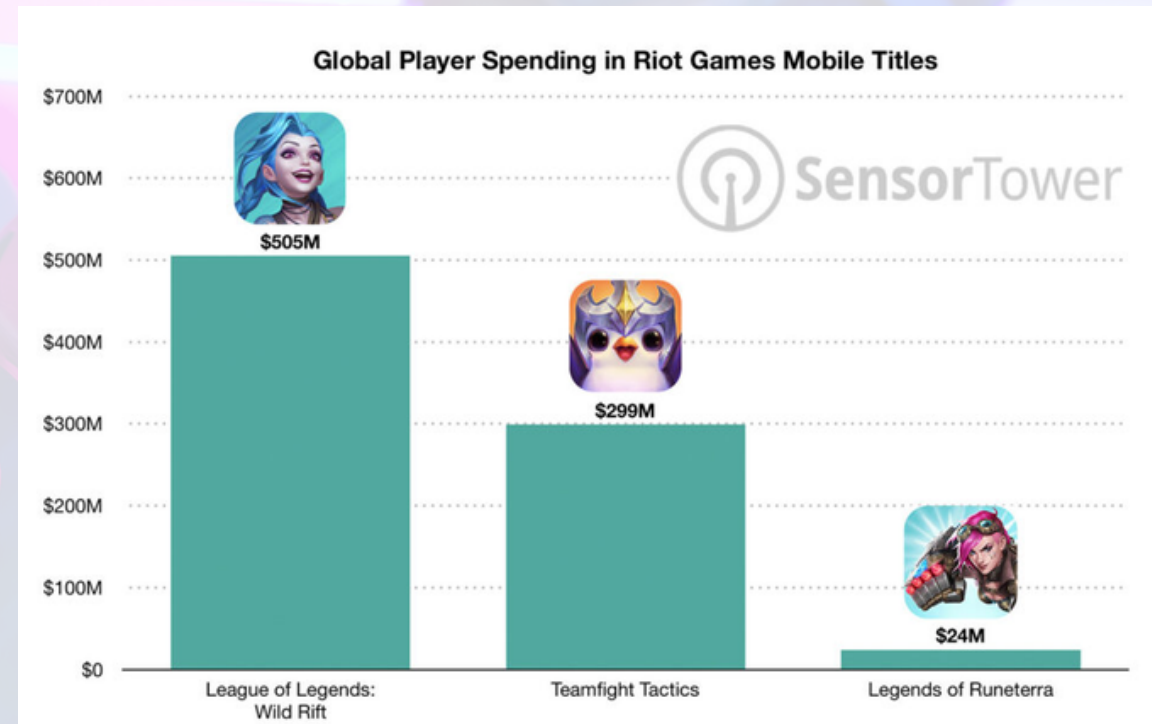
The year-over-year performance for the global mobile games market saw an increase of 2.2% as well, and India again ranked first in terms of total downloads with about 845 million times. The US took second place and Brazil third.

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

League of Legends: Wild Rift reaches \$500 Million in lifetime revenue

The mobile MOBA launched back in October 2020 and has been a massive success for Tencent-owned Riot Games since then. In fact, the only mobile MOBA that earned more than Wild Rift in the first half of 2022 is another Tencent title, Honor of Kings. However, the latter's income almost exclusively comes from China, meanwhile, Wild Rift has a massive player base worldwide.

According to Sensor Tower's data Honor of Kings earned \$1.4 billion in the first six months of 2022, meanwhile LoL: Wild Rift generated about \$218 million, followed by Supercell's Brawl Stars with \$149.5 million. Just like Riot Games, Supercell is also owned by Tencent, meaning the top three revenue-generating mobile MOBA's all belong to the same company.



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

Apps outspend games on the App Store for the first time ever in the US

According to Sensor Tower's data, US users' spending on apps has exceeded spending on games in the Apple Store for the first time since 2014. Although non-game spending decreased by 2.5% in the second quarter of 2022, this did not prevent it from getting ahead of App Store games.

In the second quarter of 2022, applications accounted for 50.3% of the revenues in the App Store. Non-game revenues on the App Store have increased 900% since June 2014. Game revenues also showed a small decline in 2022 compared to previous years. When all these factors came together, the application market appeared to be more profitable than the game market in the second quarter.

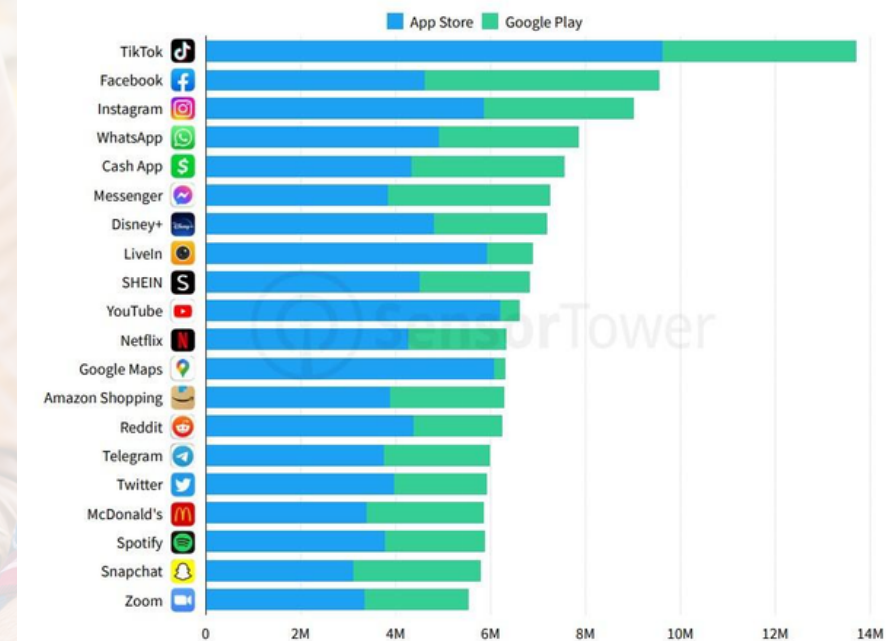
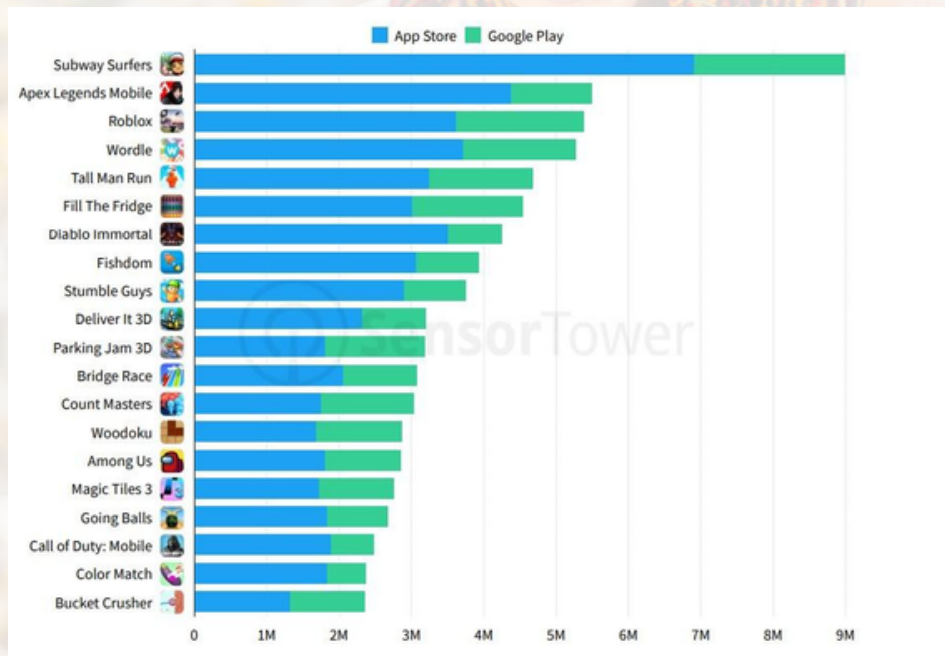


[You can view the full report here.](#)

Subscriptions are the most critical source of app revenues

The most downloaded app in the US is TikTok, and the most downloaded game is Subway Surfers. US users use the App Store more than Google Play and prefer it as the primary store. The App Store accounts for the majority of US downloads for apps and games.

The combined revenues of TikTok, Facebook, Instagram, and WhatsApp are greater than some countries' economies. Games like the newly released Apex Legends or the older Subway Surfers also generate big revenues. While US users see games as an activity for leisure such as travel or vacation, they prefer to use applications as a part of their daily lives.



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

Global Mobile Games in June 2022 - Top 20 by Revenue



Pokemon GO topped the App Store revenue list in June, posting a 60% monthly increase.

Diablo Immortal earned over \$10 million in revenue from the App Store and Google Play in June, ranking number one on the App Store's free game charts in 112 countries. This revenue placed him in 6th place.

The Japanese version of Uma Musume Pretty Derby saw a nearly 40% decrease in revenue in the App Store compared to the previous month. The game fell 13 places on the list and saw a revenue drop of about 12% compared to the last month. This caused the game to drop one place on the Google Play chart.

App Store				Google Play					
1	+3		Pokémon GO	Niantic	1	=		Coin Master	Moon Active
2	-1		Candy Crush Saga	King	2	NEW		리니지M	NCSOFT
3	+7		Genshin Impact	miHoYo	3	-1		ウマ娘 プリティーダービー	Cygames
4	-2		Roblox	Roblox	4	-1		Candy Crush Saga	King
5	=		Homescapes	Playrix	5	NEW		Lineage W	NCSOFT
6	NEW		Diablo Immortal	Blizzard Entertainment	6	-2		Roblox	Roblox
7	+1		Royal Match	Dream Games	7	=		Pokémon GO	Niantic
8	-5		Clash of Clans	Supercell	8	-2		State of Survival	FunPlus
9	+3		PUBG Mobile	Level Infinite	9	-1		Gardenscapes	Playrix
10	+1		State of Survival	FunPlus	10	-5		モンスターストライク	XFLAG
11	+5		Rise of Kingdoms	Lilith Games	11	+5		Fate/Grand Order	Aniplex
12	-3		Coin Master	Moon Active	12	-3		Evony	Top Games
13	+4		Puzzles & Survival	37Games	13	-2		Homescapes	Playrix
14	=		パズル&ドラゴンズ	GungHo	14	+4		Township	Playrix
15	-9		モンスターストライク	XFLAG	15	NEW		Royal Match	Dream Games
16	-3		Evony	Top Games	16	-2		Fishdom	Playrix
17	+2		Fishdom	Playrix	17	NEW		Bingo Blitz	Playtika Santa Monica
18	-3		Gardenscapes	Playrix	18	+1		RAID	Ptarium
19	NEW		プロ野球スピリッツA	KONAMI	19	-4		Lords Mobile	IGG
20	-13		ウマ娘 プリティーダービー	Cygames	20	-10		Garena Free Fire	Garena

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

Global Mobile Games in June 2022 - Top 20 by Download



- Eight games have just joined the list of downloads on the App Store. PUBG Mobile and Garena Free Fire are back on the list.
- Crazy Labs' simulation game Desert DIY has changed with the arrival of summer, resulting in a 486.1 percent increase in downloads.
- Master Doctor 3D added new levels and items, jumping 48 ranks, increasing 55.6% compared to last month.
- Several hyper-casual games showed strong growth in downloads. Join Clash 3D was downloaded more than 6 million times on Google Play in June, up 6.6% compared to the previous month, and rose 23 rank.

App Store			Google Play		
1	Subway Surfers	Sybo Games	1 +2	Ludo King	Gametion
2 +3	Stumble Guys	Kitka Games	2 +2	Garena Free Fire MAX	Garena
3 NEW	Diablo Immortal	Blizzard Entertainment	3 -2	Subway Surfers	Sybo Games
4 +4	Fill The Fridge	Rollic	4 -2	Tall Man Run	Supersonic
5 -1	Fishdom	Playrix	5 +2	Bridge Race	Supersonic
6 =	Roblox	Roblox	6 +2	Race Master 3D	SayGames
7 NEW	Bucket Crusher	Voodoo	7 +9	Carrom Pool	Miniclip
8 -5	Tall Man Run	Supersonic	8 +1	Candy Crush Saga	King
9 -7	Apex Legends Mobile	Electronic Arts	9 NEW	Master Doctor 3D	Abdulkadir Can Karaca
10 +5	Magic Tiles 3	Amanotes	10 +1	Stumble Guys	Kitka Games
11 -2	8 Ball Pool	Miniclip	11 +9	My Talking Tom Friends	Outfit7 Limited
12 -2	Bridge Race	Supersonic	12 NEW	Shoot Bubble	IVYMOBILE
13 +1	Among Us!	InnerSloth	13 -1	Merge Master	HOMA GAMES
14 -3	Candy Crush Saga	King	14 NEW	DOP 4	SayGames
15 NEW	Woodoku	Tripledote Studios	15 NEW	Join Clash 3D	Supersonic
16 NEW	Garena Free Fire	Garena	16 NEW	Traffic Rider	Soner Kara
17 NEW	PUBG MOBILE	Level Infinite	17 -7	Xtreme Motorbikes	Xtreme Games Studio
18 NEW	UNO!	Mattel163	18 =	Subway Princess Runner	IVYMOBILE
19 NEW	Desert DIY	Crazy Labs	19 NEW	Hill Climb Racing	Fingersoft
20 NEW	Project Makeover	Magic Tavern	20 NEW	Fill The Fridge	Rollic

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

Global Mobile Games in June 2022 - Top 20 by Advertising

- Many new games were new to ad graphics. iOS had many new AGCN games, and across Android, there was a surge in advertisements for casino games.
- Many ACGN games were new to the iOS board. Based on Three Kingdoms, developed by Doki Studio, 幻想名將傳 was officially released on June 6 and debuted on May 12 with over 6000 creatives.
- On the Android ad chart, there were five new casino games. Ukraine, Brazil, and Turkey were the main advertising regions. Pharaoh's Slinger released 17000 deduplicated creatives on Android to become #1 on the ad chart.
- Word Trip, a puzzle game from PlaySimpleGames, was new to the iOS ad graphic. The game released more than 5600 deduplicated creatives on iOS in the same month. This represents an increase of over 400% compared to the previous month.

iOS				Android					
1	NEW		Word Trip	PlaySimple Games	1	NEW		Pharaoh's Slinger	DheeraJ maurya
2	+11		Coloring Book!	Doodle Mobile	2	NEW		Tiles Hop	AMANOTES
3	-1		Fishdom	Playrix	3	NEW		Treasure Anubis	App Keep Studio
4	NEW		聖鎗	SpringGame	4	-3		The Grand Mafia	Yotta Games
5	NEW		曉ノ天刃録	Eyougame	5	NEW		Egyptian Princess	ProchyGames
6	NEW		Three Kingdoms Origin	DeNA Hong Kong	6	-4		Mafia City	Yotta Games
7	+9		Dynasty Legends 2	HK TAIHE INTERACTIVE LIMITED	7	NEW		Midnight Climb	Tagnoviq
8	-5		The Ants	Star Union Game	8	-3		聖鎗	SpringGame
9	-4		The Grand Mafia	Yotta Games	9	-3		Lords Mobile	IGG
10	NEW		Party Nốt Nhạc	X.P. Games	10	-1		Braindom	Matchingham Games
11	NEW		幻想名將傳	Doki Studio	11	NEW		Irish Adventure	muhsan apps
12	NEW		Đầu La 3D: Tuyệt Thế Đường Môn	Funtap JSC	12	NEW		Sunlights	Kiwi Technologies
13	NEW		Dream Piano	EyuGame	13	-9		Kingdom Guard	Tap4Fun
14	-10		Evertale	ZigZaGame	14	-3		Car Fix Tycoon	SONOW
15	NEW		Genius Slots	Triwin Games	15	NEW		Tongits Go	PLAYJOY
16	-15		Two Dots	Playdots	16	NEW		Word Trip	PlaySimple Games
17	NEW		Piggy GO	Forever9 Games	17	NEW		幻想名將傳	Doki Studio
18	NEW		Used Car Tycoon Games	Soul Box	18	-15		Jackpot World	BoleGaming
19	+1		Mafia City	Yotta Games	19	NEW		Merge Master Blue Monster	Fgame Global
20	NEW		Homescapes	Playrix	20	NEW		Crazy Fox	ASTAK TECH

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

Diablo Immortal's mobile version crosses \$100 million in revenue



Activision Blizzard's Diablo Immortal continues to thrive despite heavy criticism coming from fans. The mobile version of Diablo Immortal surpassed \$100 million in player spending in just eight weeks across the world.

The demon-slaying experience topped the charts across multiple regions worldwide and generated over \$50 million in revenue in its first month. The latest installment of the Diablo series also saw over 20 million downloads during the two-month period.

Sensor Tower says Diablo Immortal is currently ranked as the number 13 revenue-generating mobile game in the world, but with the game finally going live in China it may make a comeback and reach the top 10 again.

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

Top 10 most downloaded hyper-casual games in Q2 2022

- Bridge Race is still around and in fact, occupying the number one slot in terms of downloads with over 55 million users, while older games like Going Balls and Count Masters – Stickman Clash are also hanging in there, managing to stay in the top 10.
- The rest of the entries are all-new hyper-casual games, as expected from this specific genre. Tall Man Run takes second place with over 49 million downloads, while in third place we see Fill The Fridge with 48+ million downloads.

1. Bridge Race – 55.6 million downloads
2. Tall Man Run – 49.5 million downloads
3. Fill The Fridge – 48.8 million downloads
4. Race Master 3D – Car Racing – 46.7 million downloads
5. Merge Master – Dinosaur Fusion – 39 million downloads
6. Deliver it 3D – 34.2 million downloads
7. DOP 4: Draw One Part – 33.7 million downloads
8. Going Balls – 31.6 million downloads
9. Dessert DIY – 30,3 million downloads
10. Count Masters: Stickman Games – 27.8 million downloads

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



newzoo

Blockchain and play-to-earn games

- Newzoo has published a report examining blockchain and play-to-earn games. According to the report, most players play these games to earn money. Most of the active traffic comes from countries like Brazil, the Philippines, and Vietnam.
-
- The play-to-earn industry is relatively new. Competition is very high, and developers are forced to act quickly. This means sacrificing some of the features found in a regular game. Developers emphasize the business model side of play-to-earn games more than the game. However, developing a play-to-earn game with a sustainable economy is still challenging.

- Players can take real ownership of in-game assets.
- Players can earn money from play-to-earn games.
- In-game assets can be easily traded in open markets.
- Play-to-earn items can be combined. A player can transfer existing game assets to another game.

Advantages of play-to-earn games:

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

Blockchain and play-to-earn games



- As can be seen, the disadvantages of play-to-earn games outweigh the advantages quantitatively. Blockchain-based games still have a long way to go. In short, blockchain and play-to-earn games are successful as a business model but fail when it comes to games.

- Some games have a very high entry cost. The player needs to invest a significant amount.
- The gameplay is still rudimentary and highly focused on economic gain rather than a fun player experience.
- Many play-to-earn games do not have a sustainable system.
- Regulations could undermine the play-to-earn system.
- The necessity of using crypto wallets makes it difficult for play-to-earn games to quickly reach the mainstream audience.
- Most native gamers' distaste for NFTs and blockchain.

The disadvantages of play-to-earn games:

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

Latency issues persist for mobile gamers despite 5G's growth

50% of gamers say their biggest complaint about online games is lag issues. 51% think this lag issue is caused by the game company's servers or is company related.

Of the 2,000-person survey cluster, 34% say they stopped or took a break from playing an online game when faced with lag. For competitive games, this rate is slightly higher.

Lag in online games is quite an annoying problem. According to Edgegap, 72% of gamers experience lag due to network, 53% game software, and 37% to device hardware.

Who's blame for latency?



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

In 2022 H1 there were over 1.5 billion Tweets about gaming says Twitter



Twitter published a report on its blog. In the published report, the titles attract the most attention in the first half of 2022 by categories. Also, gamers sent a total of 1.5 billion tweets about games in 6 months; Twitter drew attention to an increase of 36% yearly.

Top 10 countries that tweet about games

1. Japan
2. United States
3. South Korea
4. Thailand
5. Indonesia
6. Brazil
7. Philippines
8. India
9. United Kingdom
10. Mexico

The most tweeted games

1. Genshin Impact
2. Wordle
3. Ensemble Stars!
4. Final Fantasy
5. Project Sekai
6. Apex Legends
7. Elden Ring
8. Fate/Grand Order
9. Valorant
10. The Legend of Zelda

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

FINANCIAL REPORTS



Meta's Reality Labs loses \$2.8 billion in Q2 2022

Facebook's parent company Meta posted a \$2.8 billion loss during Q2 2022 while earning \$452 million in the same period. The company's total income this quarter increased year-over-year (from \$305 million) and the first half of 2022 outperformed the previous half "first half year". Meta earned nearly \$1.15 billion during the six-month period ending in June, last year this time around the company posted \$839 million in earnings.

While the loss seems massive, it's due to Mark Zuckerberg's aggressive investment strategy in the virtual future metaverse. Meta's governing body believes metaverse, VR and AR will be the next big thing in the near future and they're funding Reality Labs while not worrying about the operating costs as much.

Considering how Reality Labs is working on a lot of technologies and products consumers are yet to see, and the business being a major investment for the future of the industry, the operating loss simply seems tolerable, despite being in billions.

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

Microsoft's gaming revenue and Xbox sales are down this quarter



Microsoft's gaming division reported a major decline in its 2022 Q4 earnings, but this is also the Big Tech company's second-best-ever Q4 performance ever in regards to revenue. The report says gaming revenue decreased by 7% year-over-year (\$259 million) and the company also saw an 11% decrease in Xbox hardware revenue. Microsoft Gaming earned \$4.6 billion this quarter.

Microsoft says the decline is due to lower engagement hours and monetization in third-party and first-party content for Xbox, but the tech giant adds that this offset is in part by growth in Xbox Game Pass subscriptions.

Despite the significant decrease in revenue, this was a record-breaking quarter for Microsoft Gaming though, as it's the division's second-best Q4 ever in terms of revenue.

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

PlayStation 5 sales cross 21.7 million but gaming revenue is down

SONY

PlayStation's owner Sony released its financial report for the three-month period that ends on June 30, 2022, and announced that it has shipped 2.4 million PlayStation 5 consoles in this quarter, meaning Big Tech company shipped a total of 21.7 million PlayStation 5 units worldwide.

The number of shipped units is only up by 0.1 million –from 2.3 million– compared to the same quarter of the previous fiscal year. PlayStation 5 sales reached 20 million earlier in June 2022, but Sony has been facing several issues delivering the next-gen console to the fans, the main problem being the chip shortage due to coronavirus related lockdowns.

Sony managed to keep its hardware sales stable, and even improved it slightly year over year, but this quarter has seen no major first-party releases on PlayStation 5 so far. Horizon Forbidden West and Gran Turismo Sport are the last first-party titles the gaming giant pushed out and these titles were released in February and March, respectively.

Sony's game sales went down from 63.6 million to 47.1 million year-over-year, and the PlayStation Plus rework didn't improve the subscriber number, in fact, it also went down, from 47.4 million to 47.3 million.

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

Ubisoft shares continue to decline in 2022 due to game delays



The financial report covers the three-month period that ends on March 31, and per the report, the sales are down by nearly 10% year-over-year for the same term. The French gaming giant earned €358 from sales in Q1 last year, but 2022's Q1 marks €318.2 in revenue. Having said all that, the numbers are slightly above Ubisoft's projections for this term, and the company is preparing for a strong closing of the year come Fall 2022.

The report says Tom Clancy's Rainbow Six Siege and the Assassin's Creed brands are performing ahead of expectations. The latest entry to Assassin's Creed series was Valhalla, which launched back in November 2020 but received multiple expansion packs, the latest being Dawn of Ragnarök.

Ubisoft will reveal the future of the Assassin's Creed series this September, share gameplay videos from Mario + Rabbids: Sparks of Hope on October 20, and for Skull and Bones on November 8. Ubisoft may also reveal more news for The Division Resurgence, the next game in the series coming to mobile devices.

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



Capcom's Q1 2022 financial report shows a massive decline

The Japanese video game giant shared the financial report for its Q1 2022, and the report shows a significant decline in both net sales and operating income. According to the official statement, Capcom's net sales were down by nearly 48% year-over-year to \$184 million and its operating income fell by 48.9% year-over-year to \$88 million.

Capcom believes the massive decline in revenue generated is due to the company not releasing any new major games in this period and it's a solid observation one can easily back up. Last year this time around, Capcom released Resident Evil Village and Monster Hunter Rise, two big releases for the Japanese firm. Both games did well and generated significant revenue.

The company's Q1 2022 performance is actually stronger than the previous three quarters, as well as compared to the prior Q1s in 2020, 2019, 2018, and 2017. The report shows a major decline, simply because Q1 2021 for Capcom was a big success.

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

Intel shares tank hard after missing Q2 2022 targets badly

The technology company Intel shared the financial report for Q2 2022, and the numbers are way below the chipmaker's expectations. Intel's shares also sank drastically, about 10%, following the release of the report.

The American company's revenue declined by 22% (GAAP) during the three-month period year-over-year. Intel also included its Non-GAAP earnings in the report, showing a 17% decline in revenue. This is still a big loss and the biggest disappointment chipmaker faced –financially– since 1999, per Refinitiv's data. The report also shows a 20.6% decline (GAAP) in gross margin.

With pretty much everything going south, Intel lowered its full-year expectations, and the US-based tech giant is now aiming for \$65 to \$68 billion in earnings in 2022. The company initially set out for \$76 billion, and most reliable analysts expected the company to hit the mark or slightly below.

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

MARKETING ANALYSIS



Mobile game industry state and marketing analysis in H1 2022

In January this year, the total number of global mobile app advertisers dropped to an all-time low of 83,400, with mobile game advertisers accounting for about 22.65%.

- Advertising market data: the total number of creatives dropped by nearly 30%, but there were significant increases in the advertisers in T2 & T3 markets.

Insights into Global Mobile App Marketing

2022 saw a YoY decline of 5.79% in the number of mobile advertisers

The overall marketing of global mobile apps has been impacted by the continuous COVID-19 pandemic and the increasingly complicated global environment. Especially in January this year, the total number of global mobile app advertisers dropped to an all-time low of 83,400. Mobile game advertisers accounted for about 22.65% in 2022.

2022 Mobile Apps (Game & Non-Game)
Monthly Advertisers: 89.5K



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

Mobil oyun sektörünün durumu ve 2022'nin ilk yarısına dair pazarlama analizi

H1 2022 saw a total of 15.8 million mobile game creatives, a YoY decline of nearly 30%. In terms of regions, Oceania and Europe reported declined trends in the number of advertisers, and all the other regions had increased advertisers, with significant increases in advertisers in T2 & T3 markets.

Insights into Global Mobile Game Marketing

Types of advertised games: There was a dramatically reduced percentage of hard-core mobile game advertisers, and an increased number of light mobile game advertisers



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Mobile game industry state and marketing analysis in H1 2022

In H1 2022, casual game advertisers accounted for 26.03% of the total advertisers, up 4.7% YoY. With the pandemic gradually controlled, most hard-core mobile games declined in percentage. RPG advertisers had been the third most during the same period last year, and were the fifth most this year, ranking below simulation and action games.

Percentage of Advertisers by Game Genre

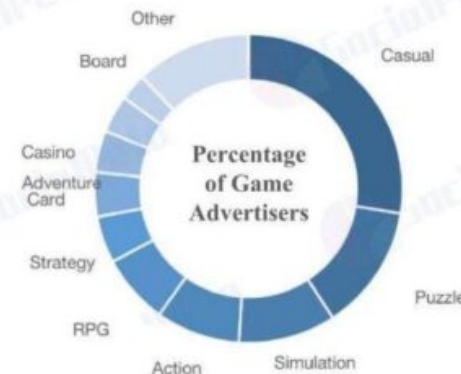
Genre	Percentage of All Genres	YoY Change
Casual	26.03%	+4.70%
Puzzle	12.47%	+0.82%
Simulation	9.64%	+1.19%
Action	8.31%	-0.14%
RPG	6.91%	-2.51%
Strategy	4.63%	-0.57%
Card	4.39%	+0.12%
Casino	4.11%	+0.78%
Adventure	3.73%	-0.42%
Board	2.66%	-0.07%

Top 3 Game Genres by Number of Advertisers

Casual, Puzzle, Simulation

There was a significantly increased percentage of casual game advertisers, accounting for 26.03% of the total advertisers, up 4.7% YoY.

There was a dramatically reduced percentage of RPG advertisers. RPGs had been the third games during the same period last year by the number of advertisers, and were ranked below simulation and action games this year.



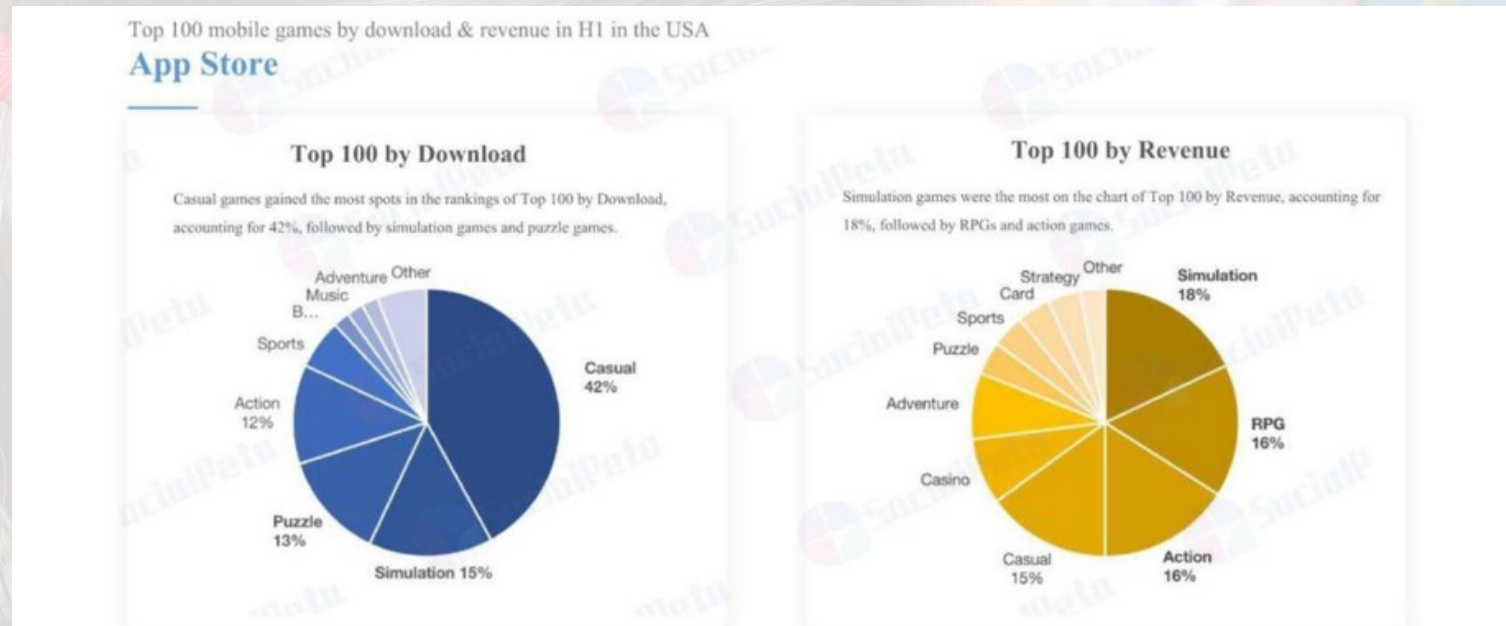
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Mobile game industry state and marketing analysis in H1 2022

In the USA, hyper-casual and puzzle game advertisers together accounted for the highest percentage of over 40%. In terms of total creatives by game type, hard-core games had the most creatives, including SLGs and match-3 games.

In terms of downloads, hyper-casual games and mobile games based on PC game IPs were relatively outstanding, especially [Diablo Immortal] and [Apex Legends Mobile]. In terms of revenue, match-3 games and SLGs were more powerful.

Analysis of Popular Game Genres in the USA



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Mobile game industry trends

- High-budget/high-quality mobile games were growing, ushering in a new era of mobile phone games

In H1 2022, Activision announced that its “Call of Duty: Warzone” would be developed into a brand-new AAA mobile version. Apple chose the mobile game “Genshin Impact” for the demonstration of product performance during the new product launch event this spring, and the game was labeled as “AAA Game” in its slide. Perhaps there will be more big game companies announcing their plans of making AAA mobile games, moving the PC gaming experience to mobile.

- There were 39% of gamers hoping to see metaverse

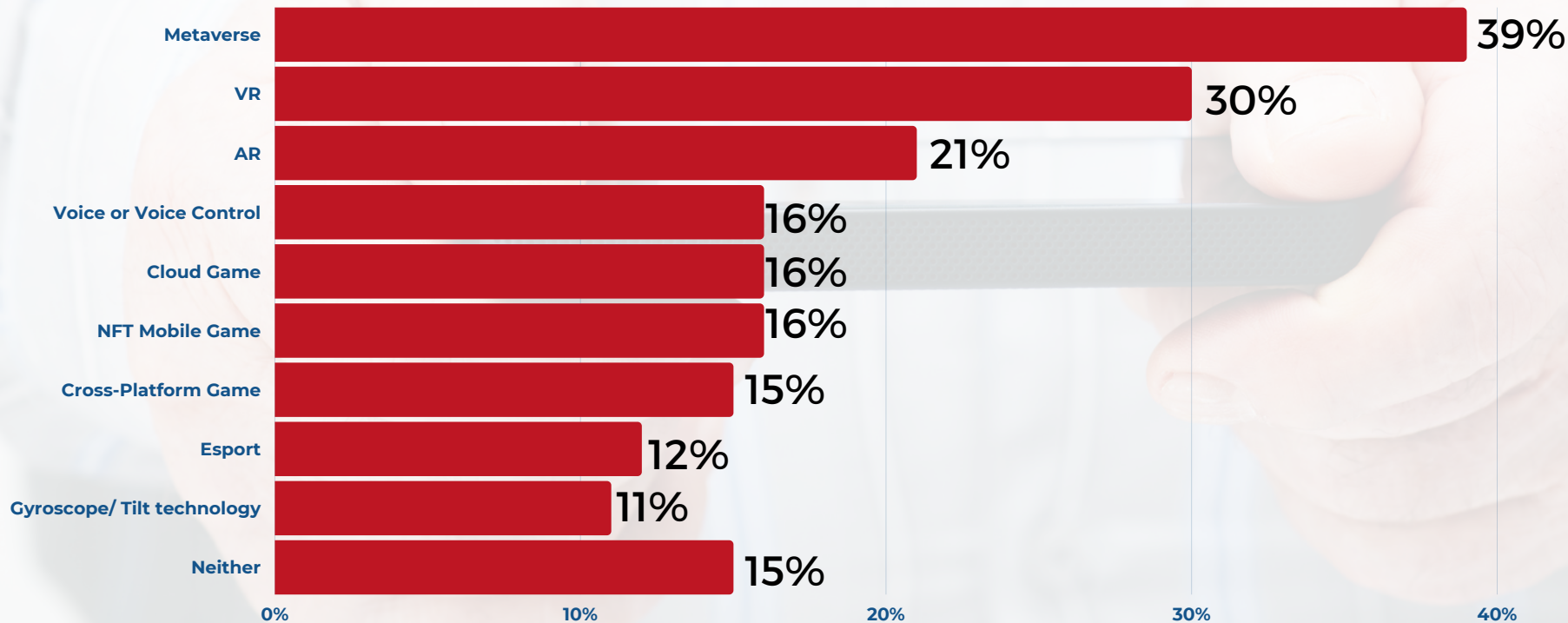
According to the “Mobile Insights Report 2022” released by Google, there are 39% of interviewed gamers who hope to see metaverse used as a new technology in games. According to SocialPeta, Generation Z is the main audience of metaverse and will accept the emerging metaverse games more readily.

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

Mobile game industry trends

- ACGN mobile games were more developed and mature, and may become a sensation worldwide
- “Genshin Impact” continued to top among all global mobile games. On the first day after its release, the Japanese version of “Arknights” topped the App Store’s free game chart, and its in-game events were well-received. According to the Chinese version of TapTap, there are over 145 games that are labeled “ACGN” elements and are planned to be released.

New technologies that are expected to be in future games



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MONTHLY GAME INDUSTRY REPORT

August 2022

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