



The State of Mobile Gaming 2021

—
An Analysis of Mobile Gaming Market Trends
and Top Titles in the U.S., Europe, and Asia



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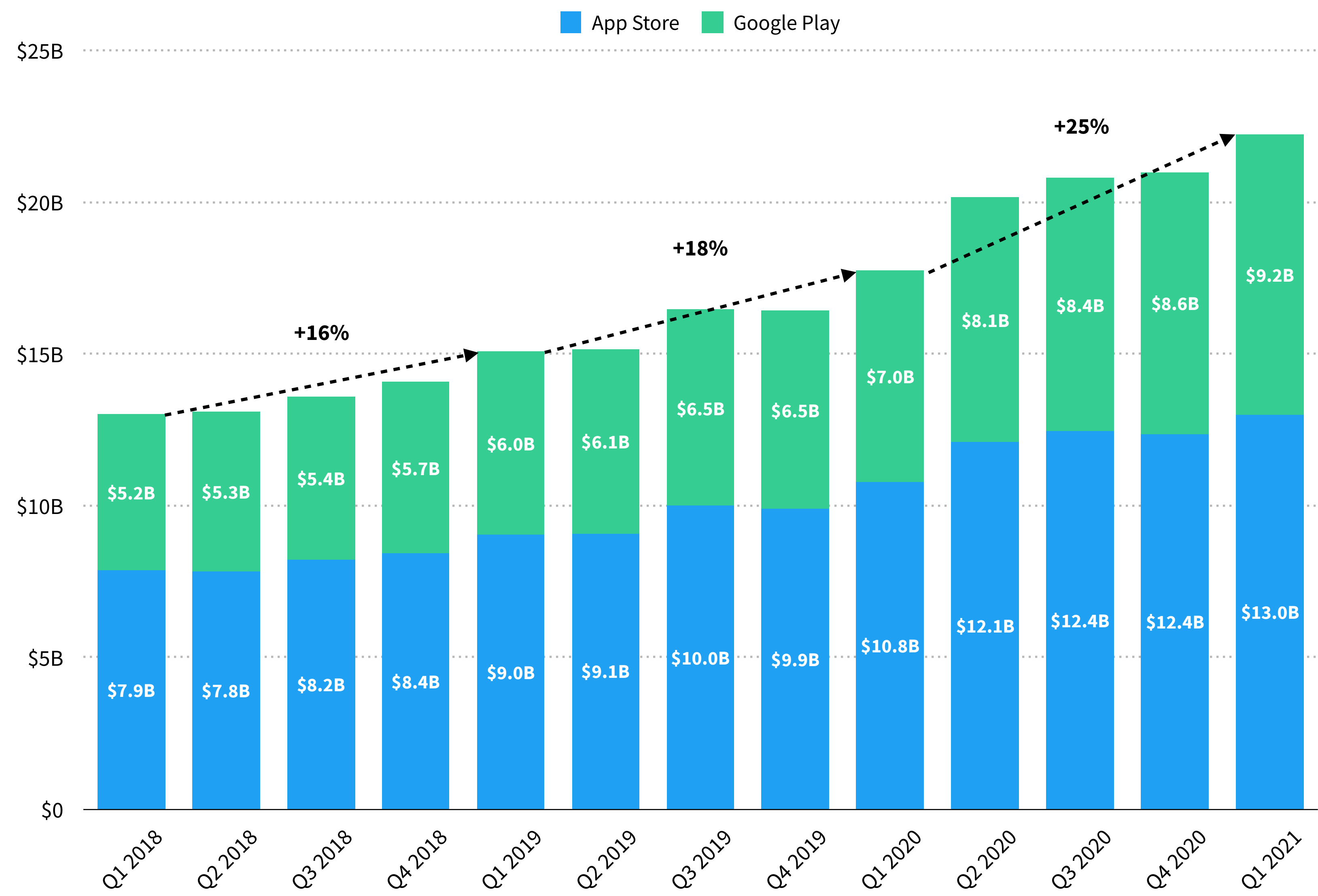


Market Overview: Worldwide

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An Overview of Mobile Gaming Worldwide

Global Game Revenue Surged During the Pandemic

Worldwide quarterly consumer spending in mobile games on the App Store and Google Play



Mobile game revenue spiked during the start of the COVID-19 pandemic, seeing its largest year-over-year growth in Q2 2020 at 33 percent. Games earned more than \$20 billion globally for the first time that quarter.






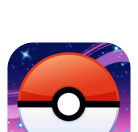




Strong revenue growth continued in the following quarters. The 25 percent Y/Y growth in Q1 2021 easily outpaced the growth during the prior two years.

Note:
Revenue figures are gross revenue (including the cut taken by Apple or Google).










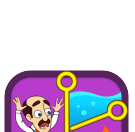
Genshin Impact Shakes Up the Global Revenue Ranking and Eyes Tencent's Top Titles

Top mobile games by worldwide revenue on the App Store and Google Play









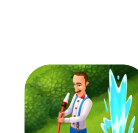
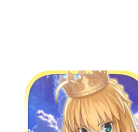
2018

1		Honor of Kings Tencent
2		Monster Strike Mixi
3		Fate/Grand Order Sony
4		Candy Crush Saga King
5		LineageM NCSOFT
6		Pokémon GO Niantic
7		Fantasy WW Journey NetEase
8		DBZ Dokkan Battle BANDAI NAMCO
9		Clash of Clans Supercell
10		Clash Royale Supercell





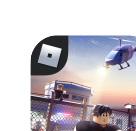


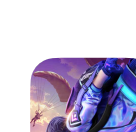
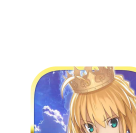
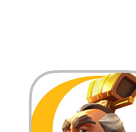
2019

1		Honor of Kings Tencent	-
2		PUBG Mobile Tencent	NEW
3		Fate/Grand Order Sony	-
4		Candy Crush Saga King	-
5		Monster Strike Mixi	-3
6		Pokémon GO Niantic	-
7		Fantasy WW Journey NetEase	-
8		LineageM NCSOFT	-3
9		Clash of Clans Supercell	-
10		Homescapes Playrix	NEW

2020

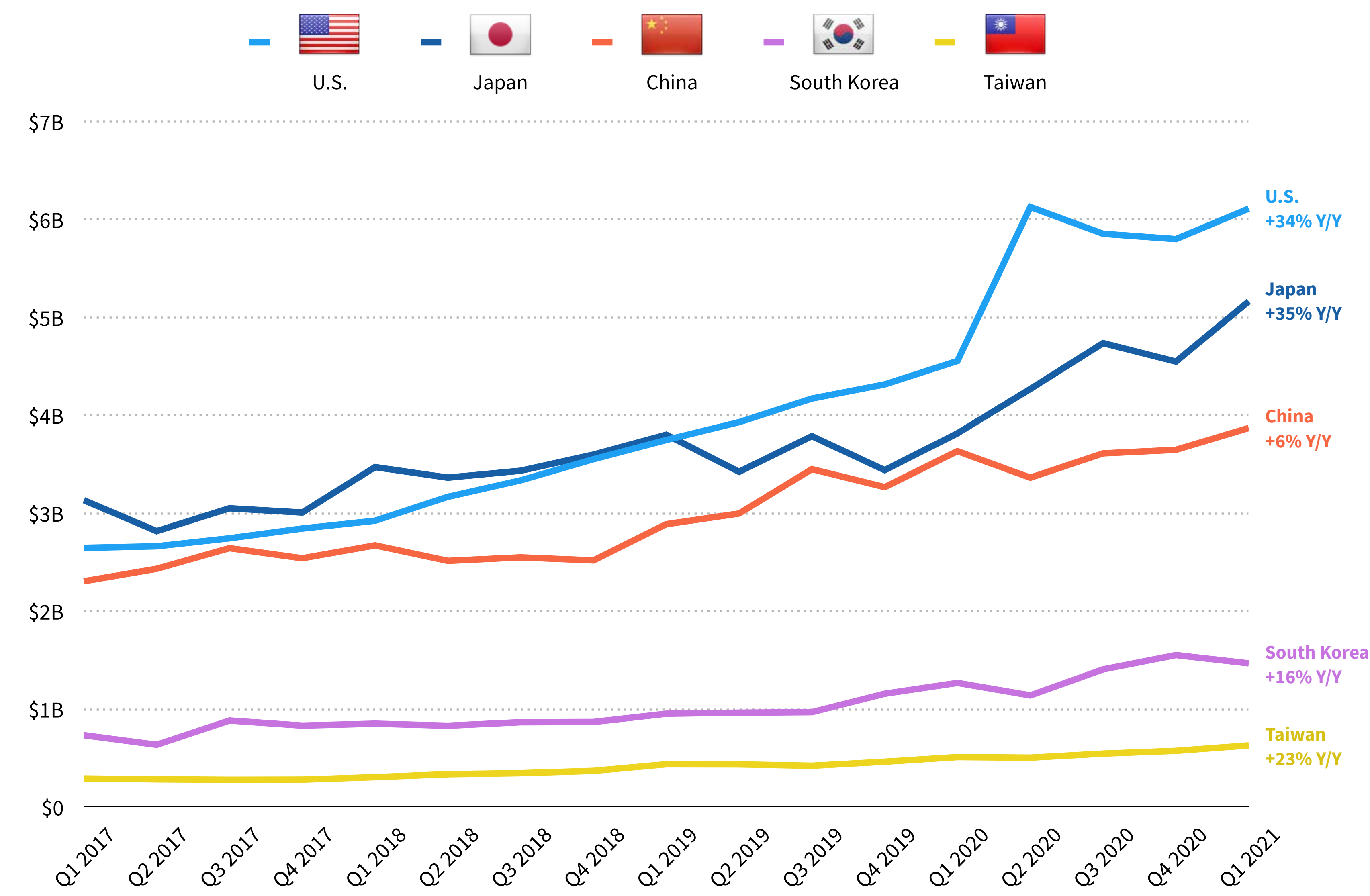
1		PUBG Mobile Tencent	+1
2		Honor of Kings Tencent	-1
3		Pokémon GO Niantic	+3
4		Coin Master Moon Active	NEW
5		Roblox Roblox	NEW
6		Candy Crush Saga King	-2
7		Monster Strike Mixi	-2
8		Rise of Kingdoms Lilith Games	NEW
9		Gardenscapes Playrix	NEW
10		Fate/Grand Order Sony	-7

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1		PUBG Mobile Tencent	-
2		Honor of Kings Tencent	-
3		Genshin Impact miHoYo	NEW
4		Pokémon GO Niantic	-1
5		Roblox Roblox	-
6		Coin Master Moon Active	-2
7		Candy Crush Saga King	-1
8		Garena Free Fire Garena	NEW
9		Fate/Grand Order Sony	+1
10		Rise of Kingdoms Lilith Games	-2

The U.S. Remains the Top Market for Mobile Game Spending

Top countries by mobile game spending, App Store and Google Play



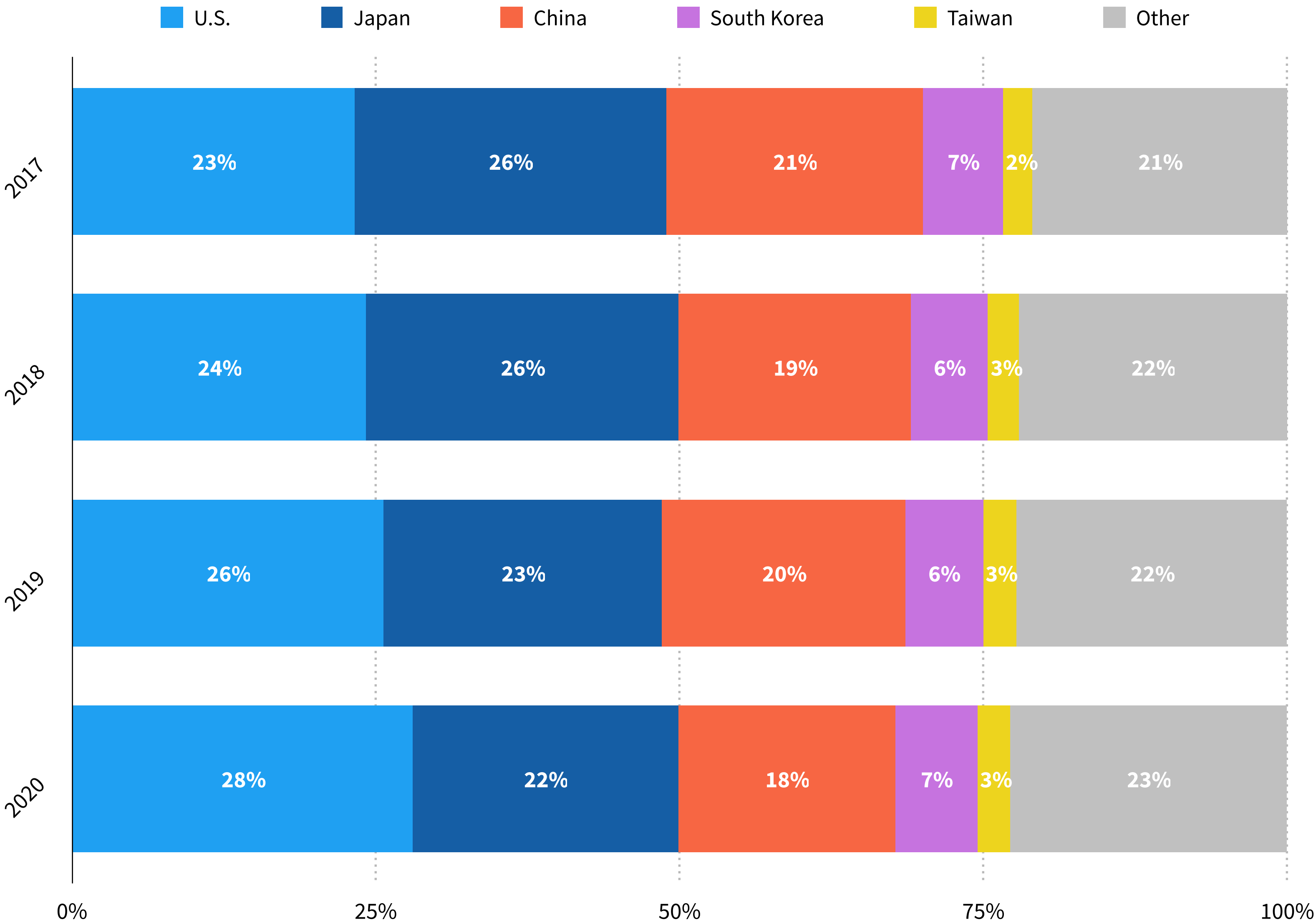
The U.S. remains the top market for mobile games having outpaced Japan in Q2 2019, and surpassed \$6 billion in revenue during Q1 2021. COVID-19 boosted player spending 35 percent Q/Q in Q2 2020. Although revenue fell slightly over the next two quarters, growth picked back up again in Q1 2021.

Japan and China were the next largest markets, well ahead of any other countries. Japan’s revenue climbed 35 percent Y/Y in Q1 2021, while China’s total in particularly impressive considering Google Play is not available in the country.

Note:
Revenue figures are gross revenue (including the cut taken by Apple or Google). China numbers only include the App Store as Google Play is not available there.

The U.S. is Also Gaining Market Share for Revenue

Market share for top countries by mobile game spending, App Store and Google Play



The U.S. passed Japan to become the largest mobile games market in 2019. Its market share has continued to grow since, reaching 28 percent in 2020.

Countries outside of the top five have also slowly gained market share, suggesting that mobile game publishers have turned to less-tapped markets with higher growth potential.

Note:
Revenue figures are gross revenue (including the cut taken by Apple or Google). China numbers only include the App Store as Google Play is not available there.

Spending Grew by More than \$1 Billion in the U.S. and Japan

Top countries by Y/Y mobile game spending growth in Q1 2021, App Store and Google Play



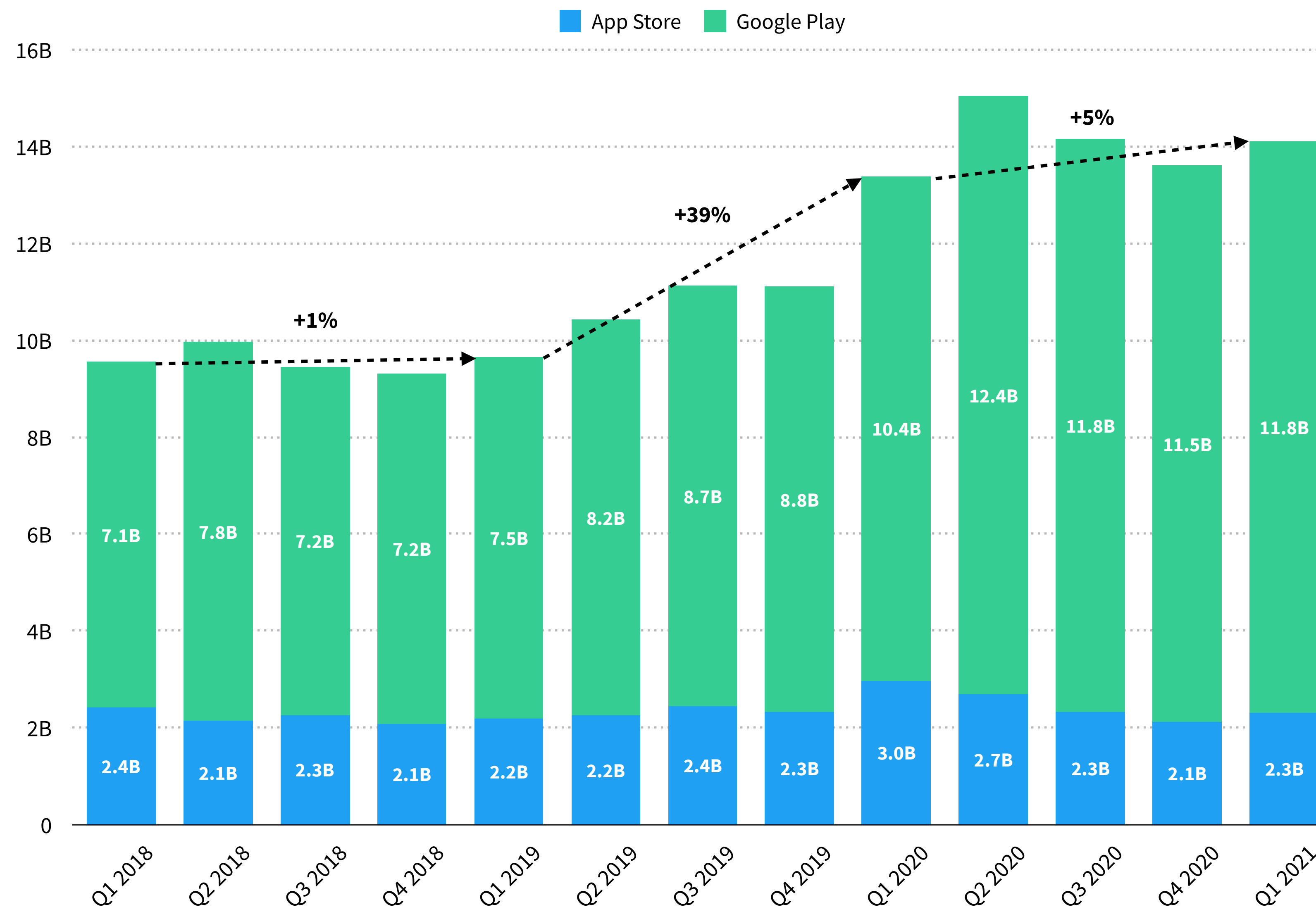
Consumer spending in mobile games in the U.S. grew by more than \$1.5 billion Y/Y in Q1 2021. This growth was more than all but Japan and China earned in total during the quarter.

The top countries by growth included four of the top five countries by overall revenue. The one exception was Germany, the top country in Europe, with 33 percent Y/Y growth to nearly \$600 million.

Note: Revenue figures are gross revenue (including the cut taken by Apple or Google). China numbers only include the App Store as Google Play is not available there.

Mobile Game Adoption Soared 39% Amid the Pandemic

Worldwide quarterly downloads of mobile games on the App Store and Google Play



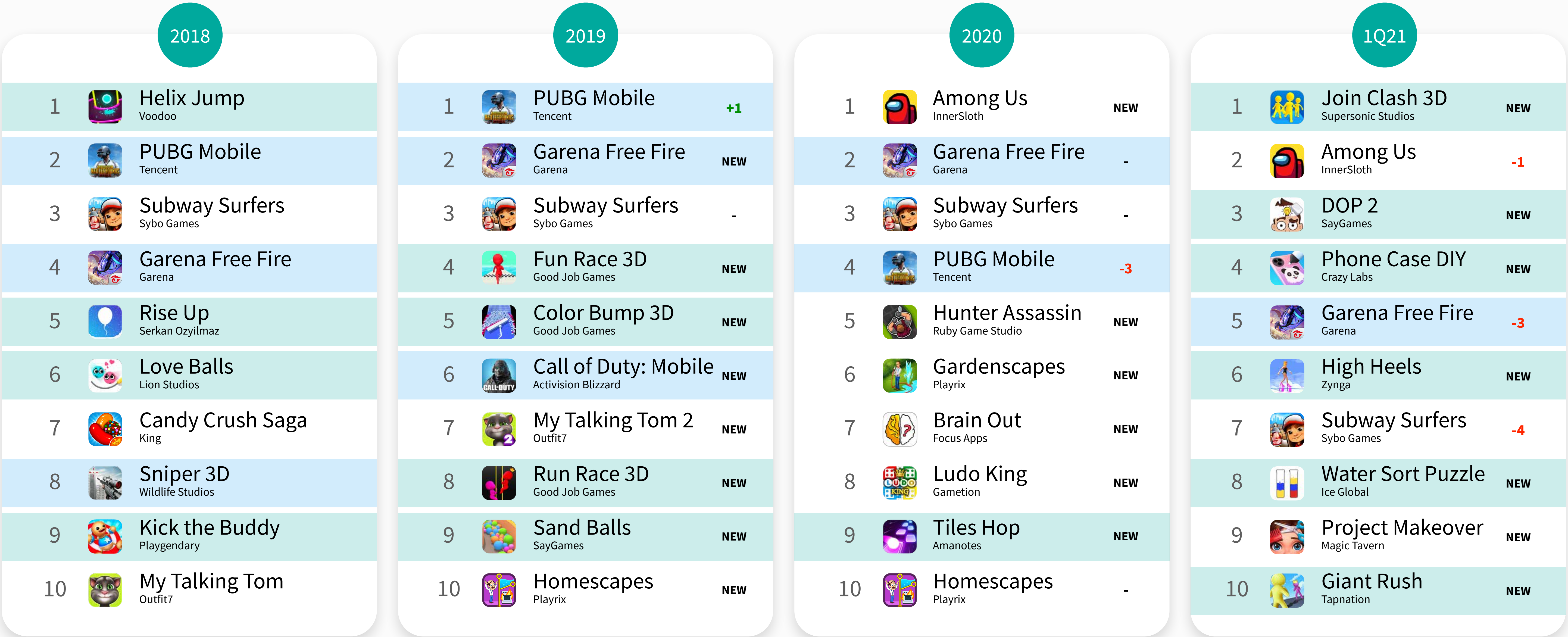
The surge in mobile game downloads preceded that for revenue, with big gains starting in Q1 2020 right at the beginning of the pandemic. Consumers turned to mobile games for entertainment during office and school closures.

Although mobile game adoption has slowed since the peak in Q2 2020, it remained well above pre-pandemic levels. This suggests that some of the gains may persist even as countries begin to re-open in 2021.

Hypercasual and Shooter Titles Frequent the Top 10 for Downloads

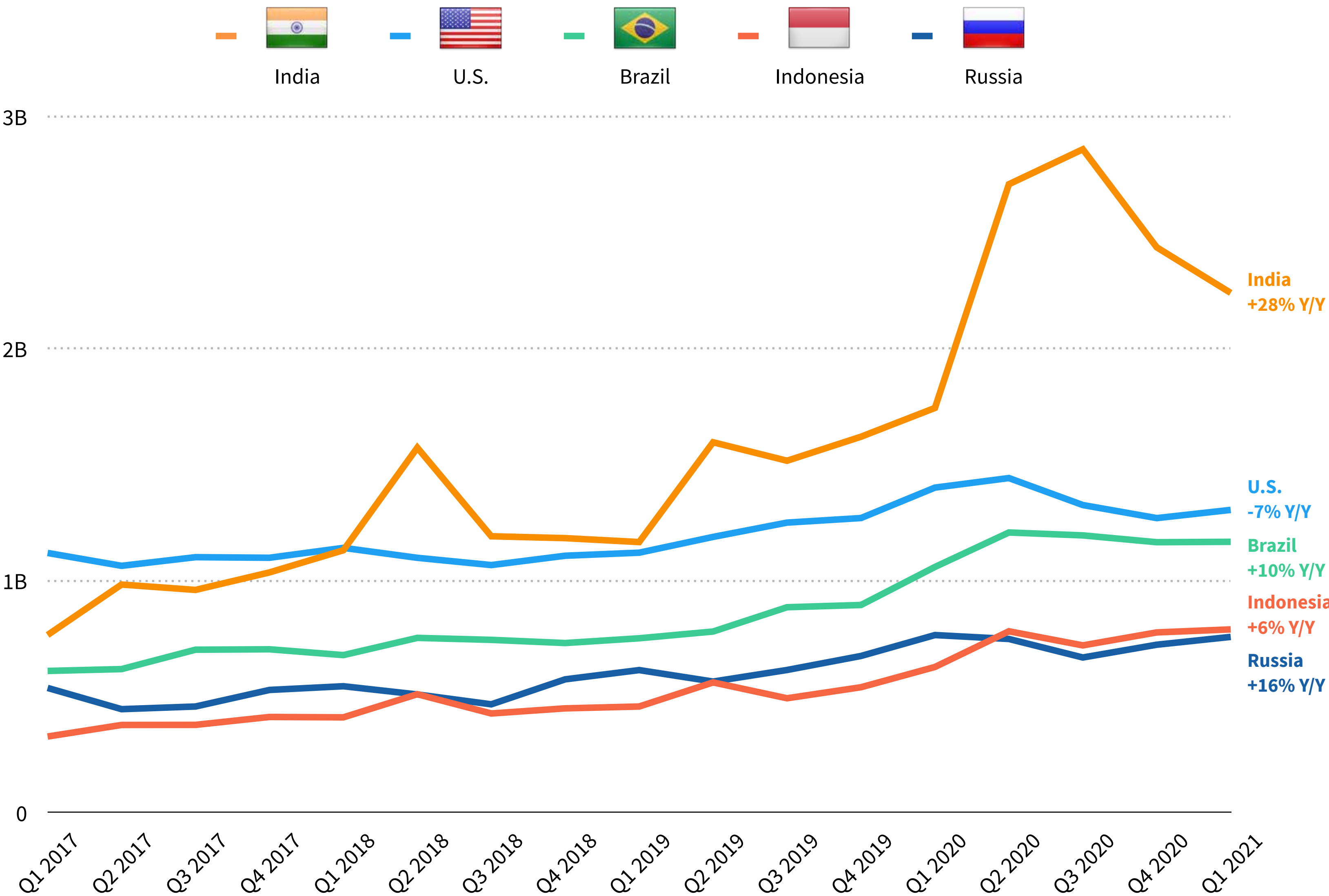
Top mobile games by worldwide downloads on the App Store and Google Play

Hypercasual Shooter



India's Mobile Games Market Pulled Away from the Pack

Top countries by mobile game downloads, App Store and Google Play

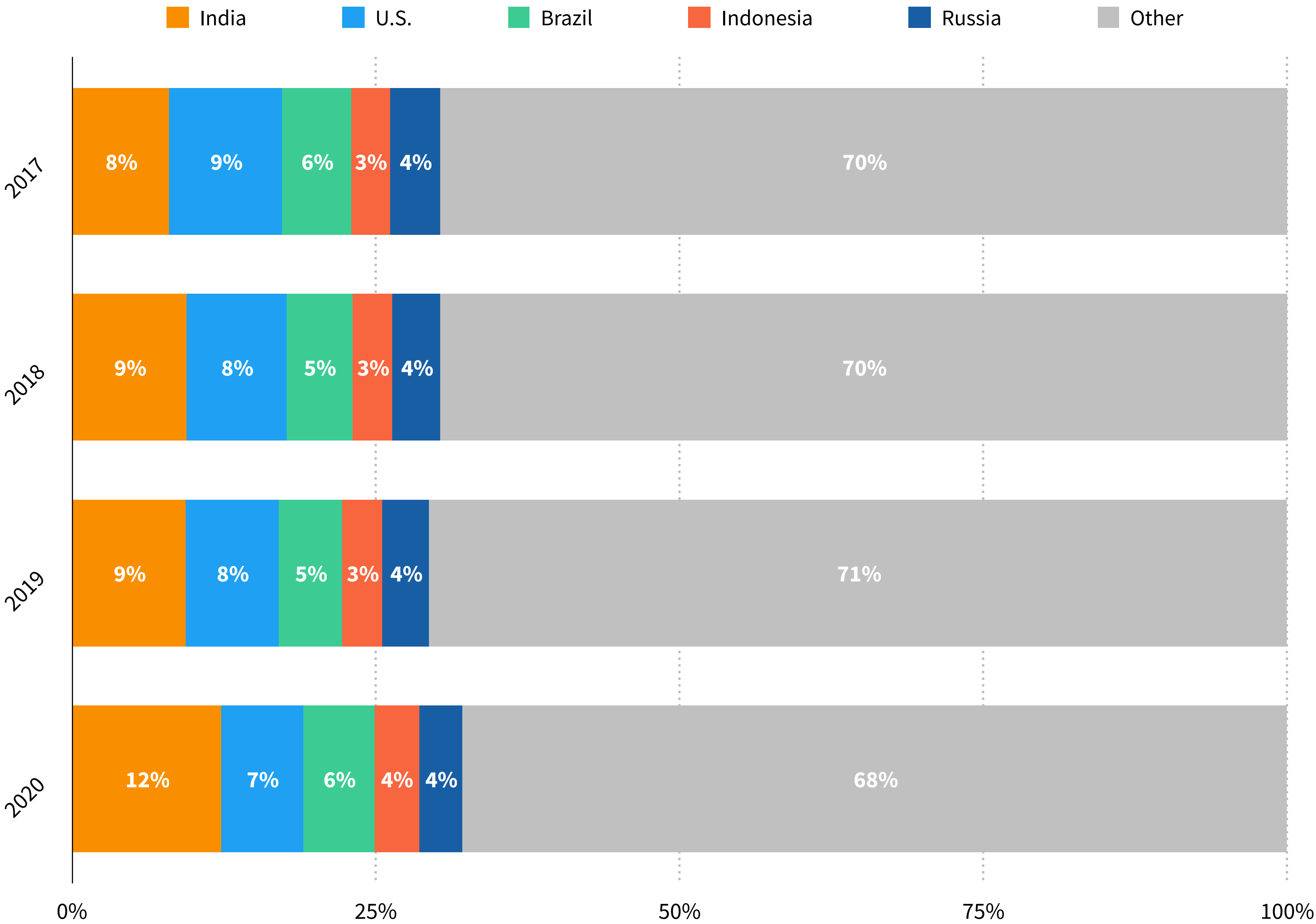


As smartphone penetration in India increased in recent years, it has become the largest market for mobile game downloads. COVID-19 boosted game adoption in the market by 64 percent from 1.7 billion in Q1 2020 to 2.9 billion in Q3 2020.

Emerging markets such as India, Brazil, and Russia achieved double-digit year-over-year download growth in Q1 2021. Meanwhile, relatively mature mobile markets like the U.S. had lower growth.

India Accounted for 12 Percent of Game Downloads in 2020

Market share for top countries by mobile game downloads, App Store and Google Play

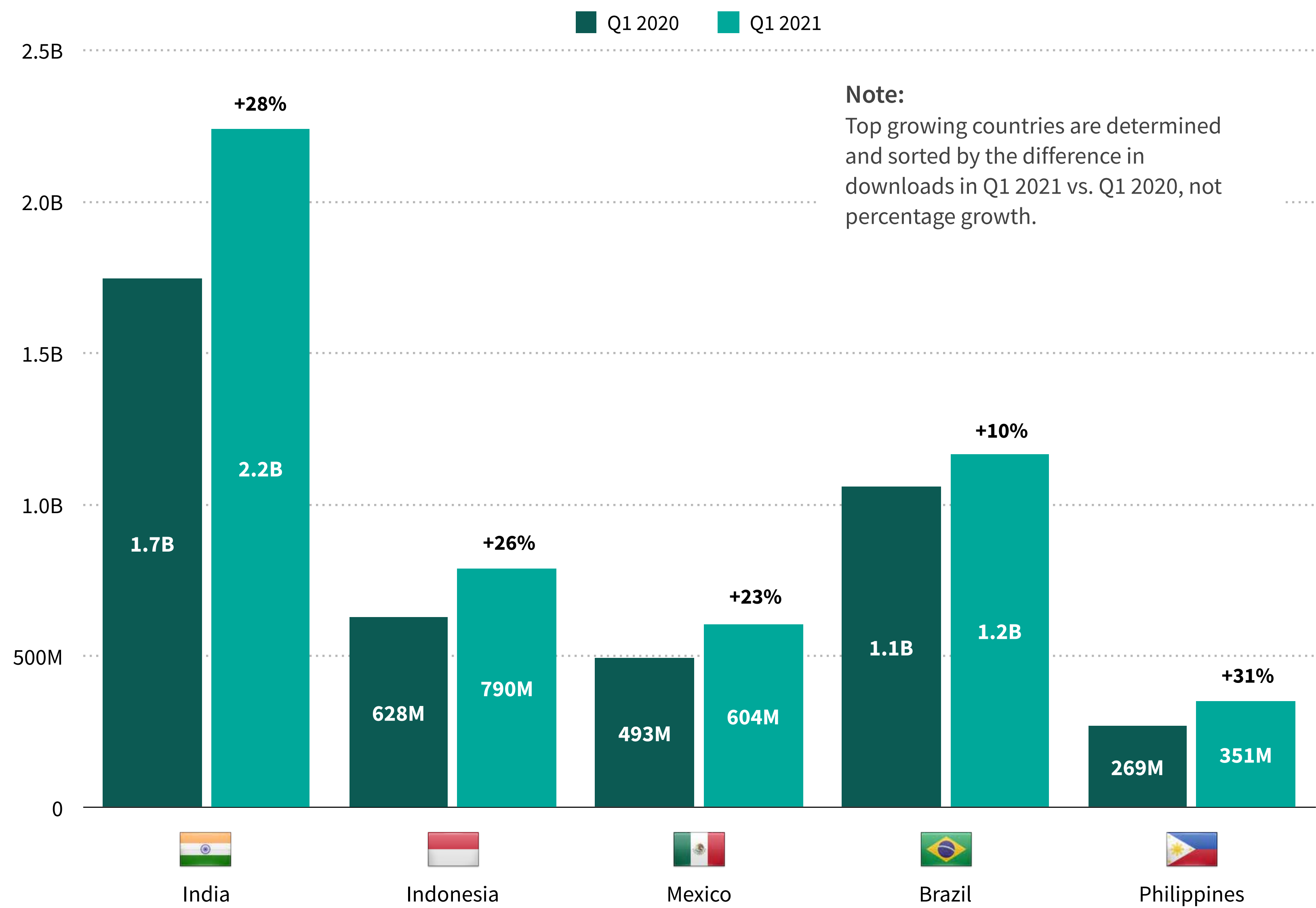


India became the only country to gain more than 10 percent of the global game install market since 2017 in 2020, reaching 12 percent of downloads. The U.S. was next with 7 percent, followed by Brazil at 6 percent.

While 77 percent of mobile game revenue in 2020 was concentrated among the five largest markets, the top five countries by downloads combined for only 32 percent of the installs. This demonstrates how getting users to spend in mobile games remains more challenging than new user adoption in most markets.

Google Play Drove Download Growth in Top Markets

Top countries by Y/Y mobile game download growth in Q1 2021, App Store and Google Play

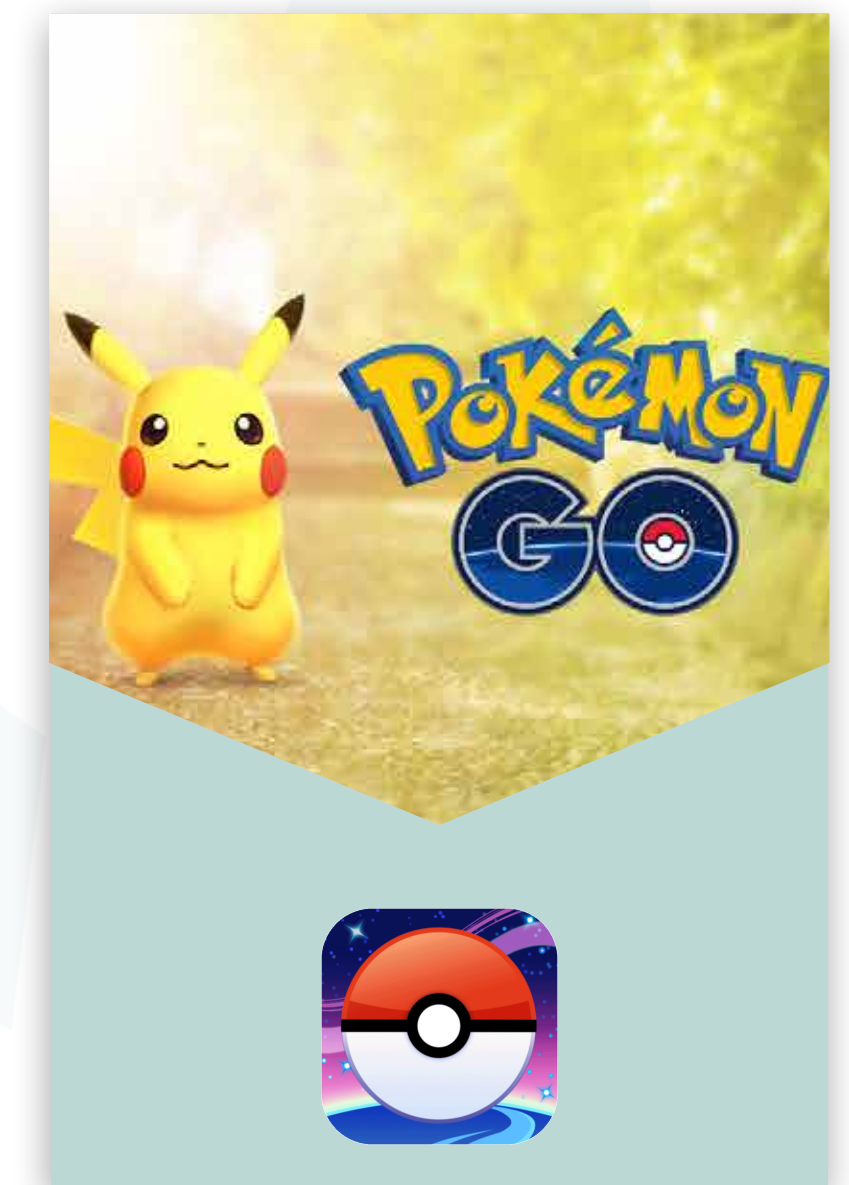
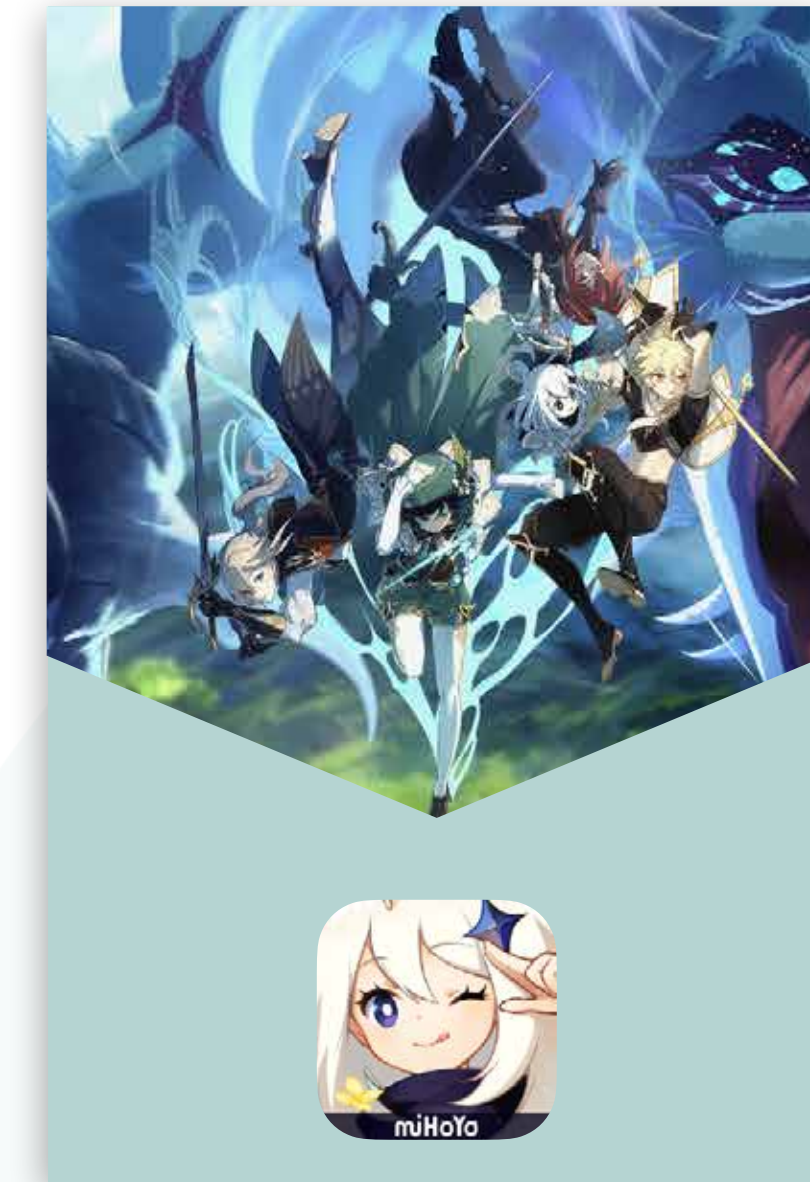


Game downloads in India climbed by nearly half a billion year-over-year in Q1 2021. Indonesia, Mexico, and Brazil also saw downloads grow by more than 100 million.

Each of the top five countries by download growth had at least 90 percent of their installs from Google Play, with less than 10 percent from the App Store. This reflected the trends on each platform, as Google Play installs climbed 66 percent between Q1 2018 and Q1 2021, while App Store download growth was flat over this period.

Key Takeaways: Worldwide

1. The mobile games market is booming, as game revenue growth accelerated during the pandemic. Consumer spending surpassed \$22 billion in Q1 2021, representing an all-time high and 25 percent year-over-year growth.
2. Mobile game downloads also surged during the pandemic. This was primarily led by developing markets like India and Brazil.
3. While more than two-thirds of mobile game revenue comes from just three countries (the U.S., Japan, and China), growth in some smaller markets in Europe and Southeast Asia have exceeded that in these largest markets. It is unlikely that any other country will compete with the top three anytime soon. However, these fast-growing alternatives will provide opportunities for game developers looking to expand to new regions.

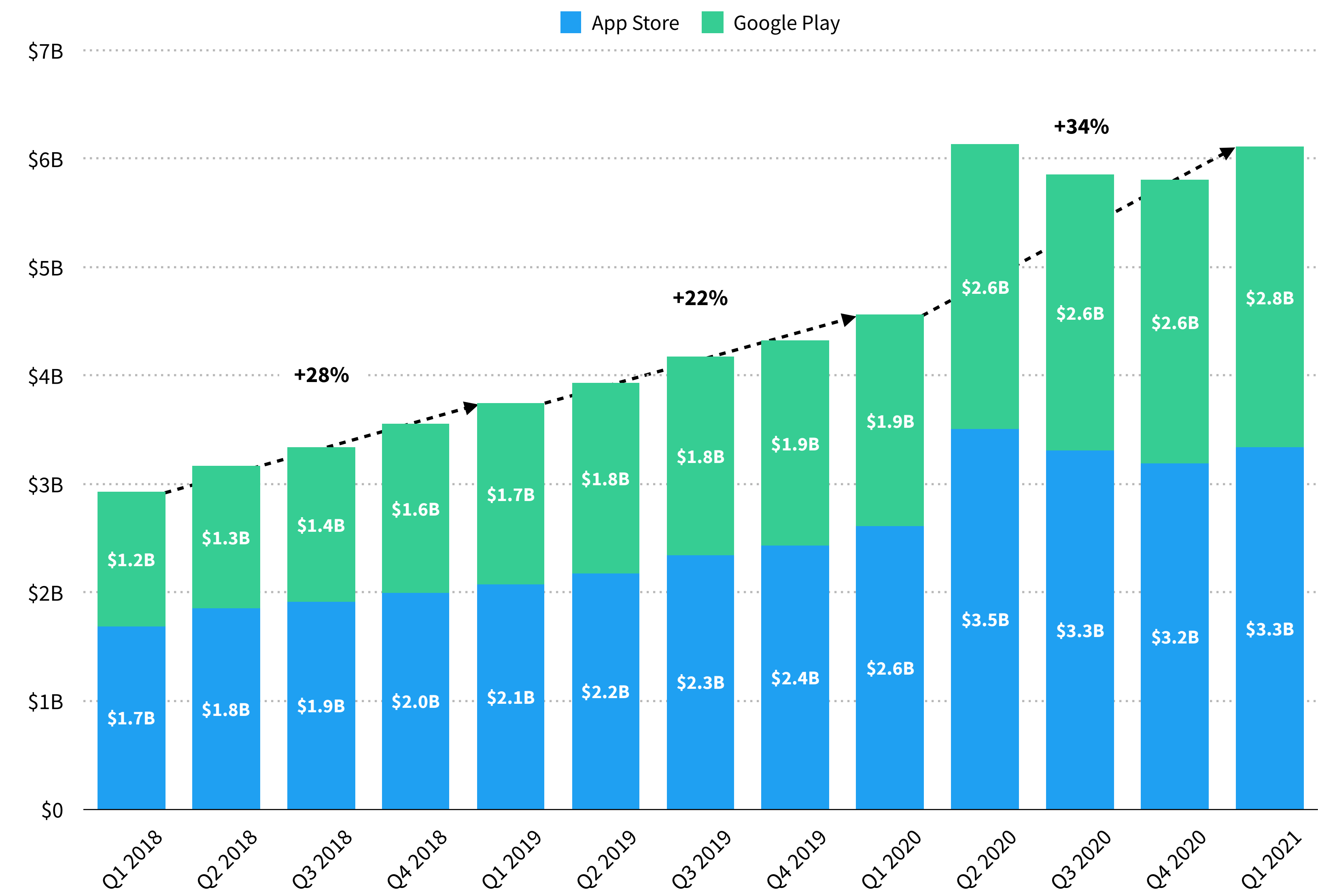


Market Overview: United States

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An Overview of Mobile Gaming in the U.S.

U.S. Game Revenue Growth Outpaced the Global Rate

U.S. quarterly gross revenue from mobile games on the App Store and Google Play



U.S. mobile game consumer spending surpassed \$6 billion for only the second time in Q1 2021, just below the \$6.1 billion spent in Q2 2020. There was a notable increase at the start of the pandemic that persisted into 2021.










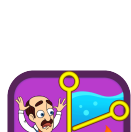
The U.S. is still the top market for mobile gaming. Its revenue has more than doubled since the start of 2018, higher growth than the worldwide rate.

Note:
Revenue figures are gross revenue (including the cut taken by Apple or Google).






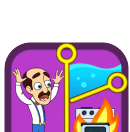

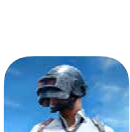


Roblox Became the Top Grossing Mobile Game in the U.S. in 2020

Top mobile games by U.S. revenue on the App Store and Google Play





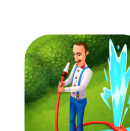
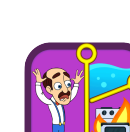


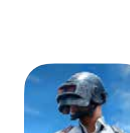
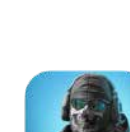
2018

1		Candy Crush Saga King
2		Fortnite Epic Games
3		Pokémon GO Niantic
4		Clash of Clans Supercell
5		Slotomania Playtika
6		Candy Crush Soda Saga King
7		Roblox Roblox
8		Toon Blast Peak Games
9		Final Fantasy XV Epic Action
10		Homescapes Playrix






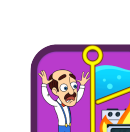
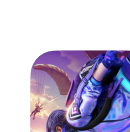

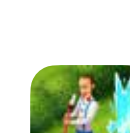

2019

1		Candy Crush Saga King	-
2		Roblox Roblox	+5
3		Clash of Clans Supercell	+1
4		Pokémon GO Niantic	-1
5		Coin Master Moon Active	NEW
6		Homescapes Playrix	+4
7		Slotomania Playtika	-2
8		PUBG Mobile Tencent	NEW
9		Fortnite Epic Games	-7
10		Toon Blast Peak Games	-2

2020

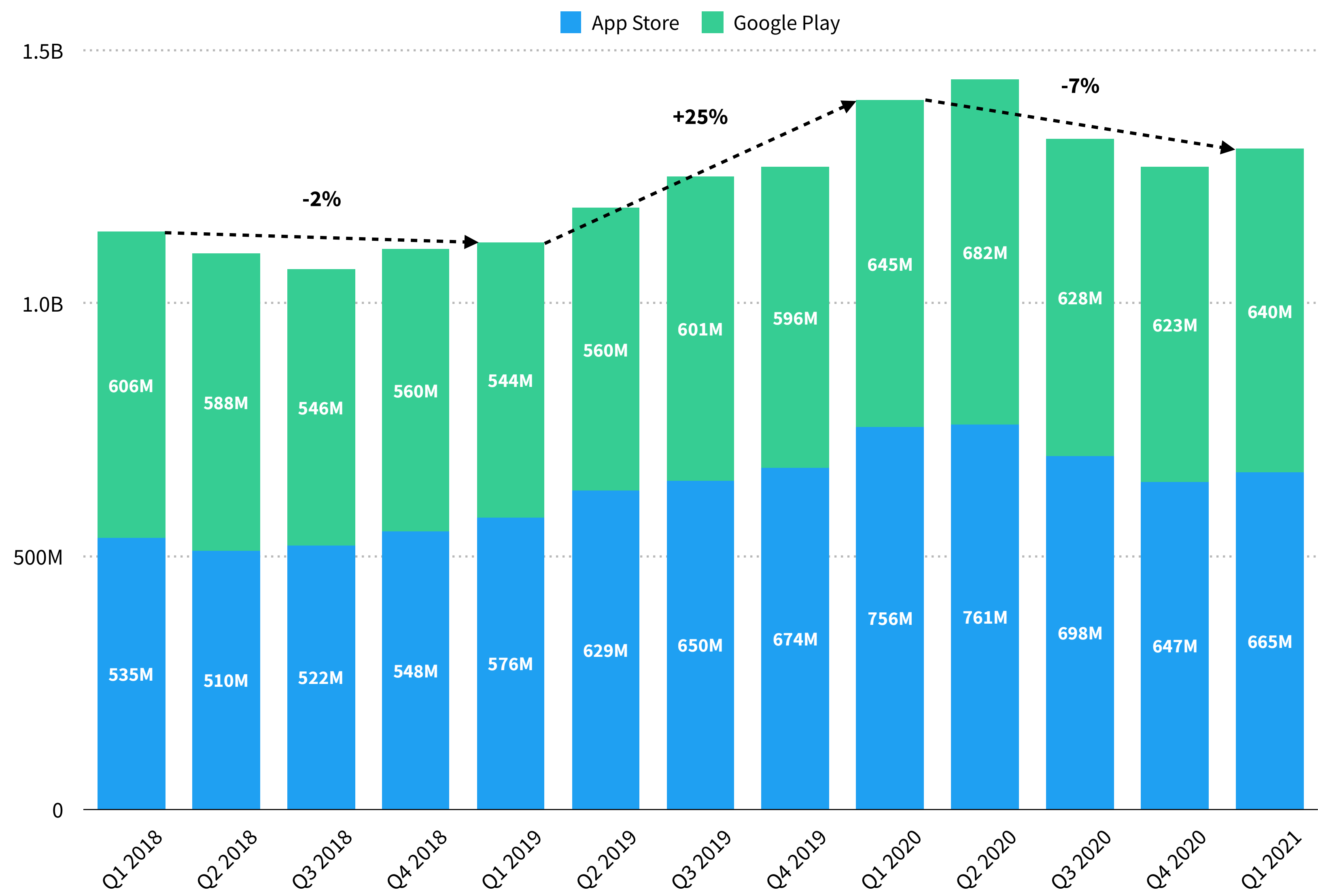
1		Roblox Roblox	+1
2		Candy Crush Saga King	-1
3		Coin Master Moon Active	+2
4		Pokémon GO Niantic	-
5		Gardenscapes Playrix	NEW
6		Homescapes Playrix	-
7		Clash of Clans Supercell	-4
8		Slotomania Playtika	-1
9		PUBG Mobile Tencent	-1
10		Call of Duty: Mobile Activision Blizzard	NEW

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1		Roblox Roblox	-
2		Candy Crush Saga King	-
3		Coin Master Moon Active	-
4		Lords Mobile IGG	NEW
5		Pokémon GO Niantic	-1
6		Homescapes Playrix	-
7		Garena Free Fire Garena	NEW
8		Genshin Impact miHoYo	NEW
9		Gardenscapes Playrix	-4
10		State of Survival FunPlus	NEW

U.S. Game Installs Fell Slightly From a Mid-Pandemic Peak

U.S. quarterly downloads from mobile games on the App Store and Google Play













While U.S. mobile game revenue remained high each quarter during the pandemic, downloads fell off from their peak in the first few quarters of the pandemic. Q1 2021 downloads were still slightly higher than the pre-pandemic quarters.

Download growth had started to pick up in 2019 even before the spread of COVID-19. Quarter-over-quarter growth in Q1 2021 also shows promise for the upcoming quarters.




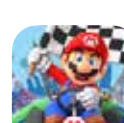


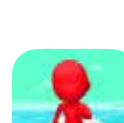

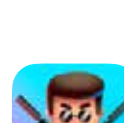
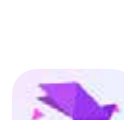
Top Apps by U.S. Downloads Included Many New Launches

Top mobile games by U.S. downloads on the App Store and Google Play




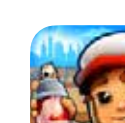






2018

- 1  **Helix Jump**
Voodoo
- 2  **Fortnite**
Epic Games
- 3  **PUBG Mobile**
Tencent
- 4  **Rise Up**
Serkan Ozyilmaz
- 5  **Hole.io**
Voodoo
- 6  **Roblox**
Roblox
- 7  **Love Balls**
Lion Studios
- 8  **Happy Glass**
Lion Studios
- 9  **Granny**
DVloper
- 10  **Hello Stars**
Fastone Games


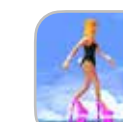


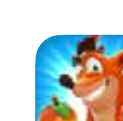
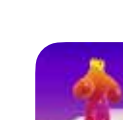



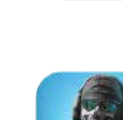
2019

- 1  **Call of Duty: Mobile** NEW
Activision Blizzard
- 2  **Color Bump 3D** NEW
Good Job Games
- 3  **Aquapark.io** NEW
Voodoo
- 4  **Mario Kart Tour** NEW
Nintendo
- 5  **Roblox** +1
Roblox
- 6  **Wordscapes** NEW
PeopleFun
- 7  **Fun Race 3D** NEW
Good Job Games
- 8  **Run Race 3D** NEW
Good Job Games
- 9  **Mr Bullet** NEW
Lion Studios
- 10  **Polysphere** NEW
Playgendary

2020

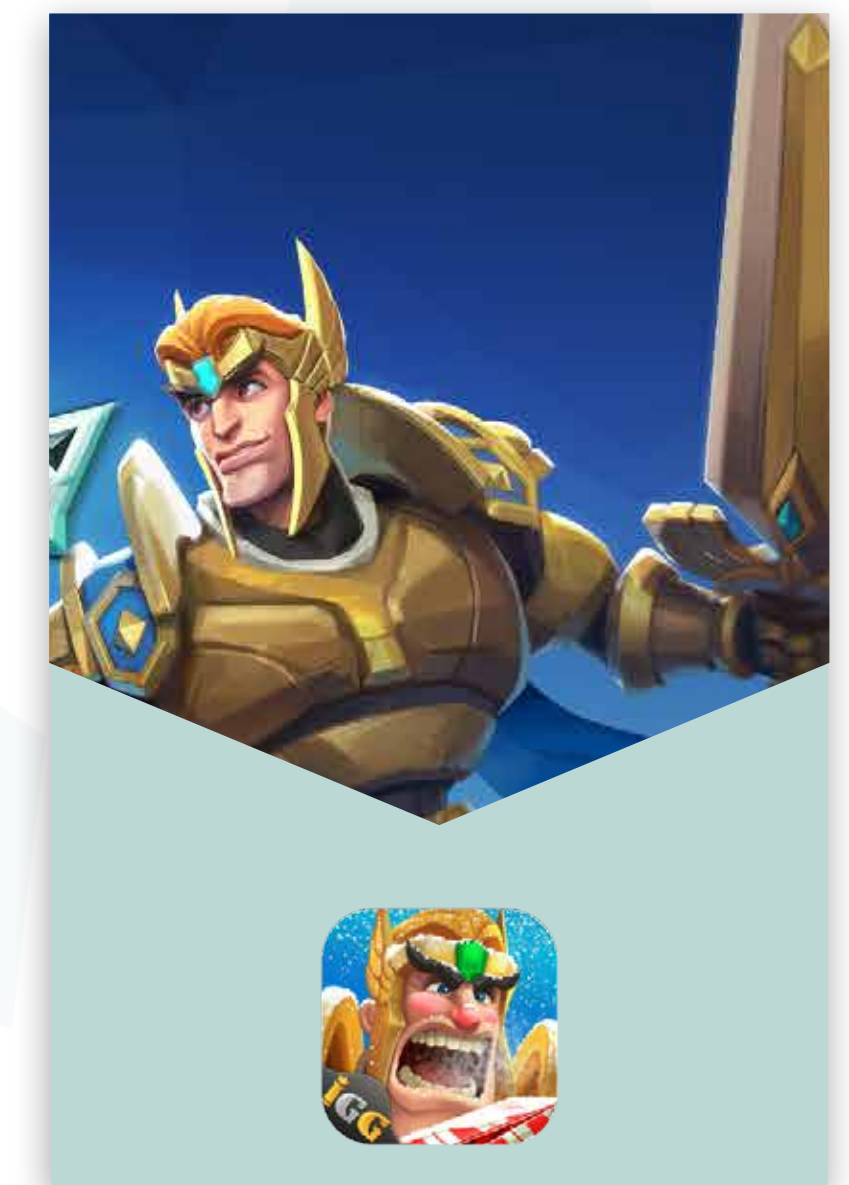
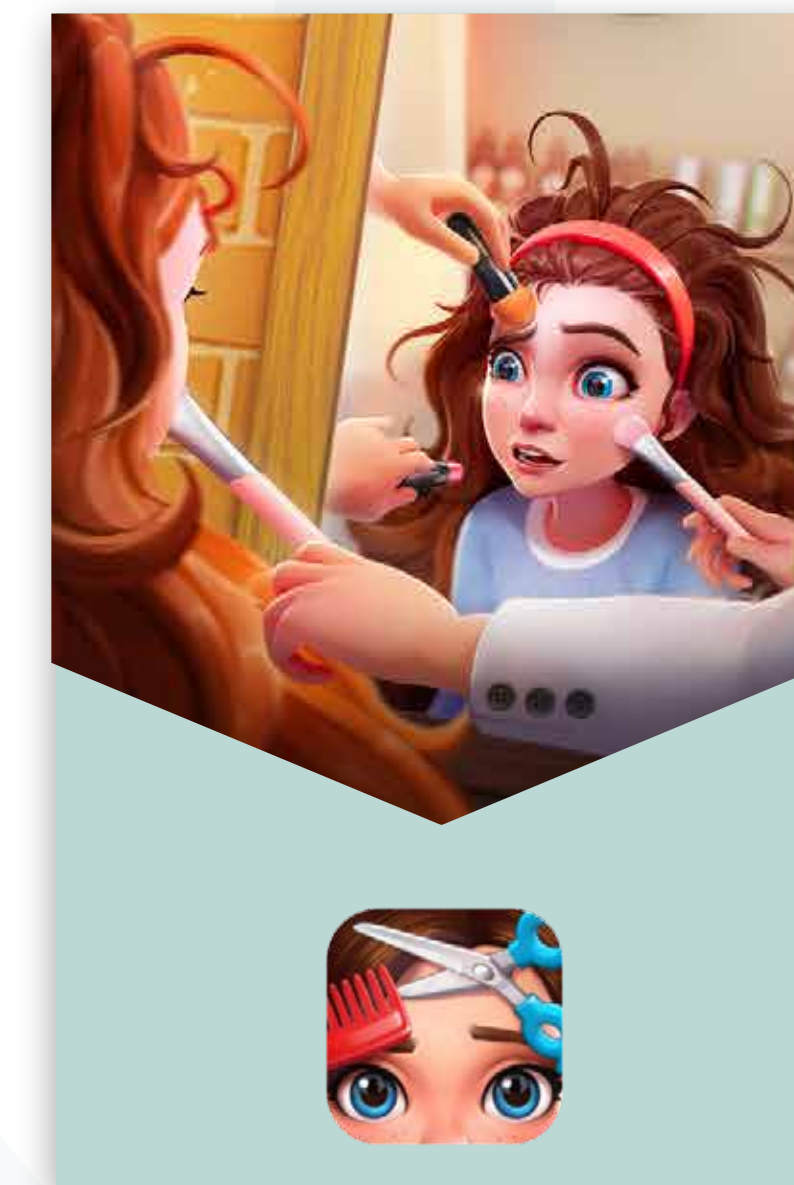
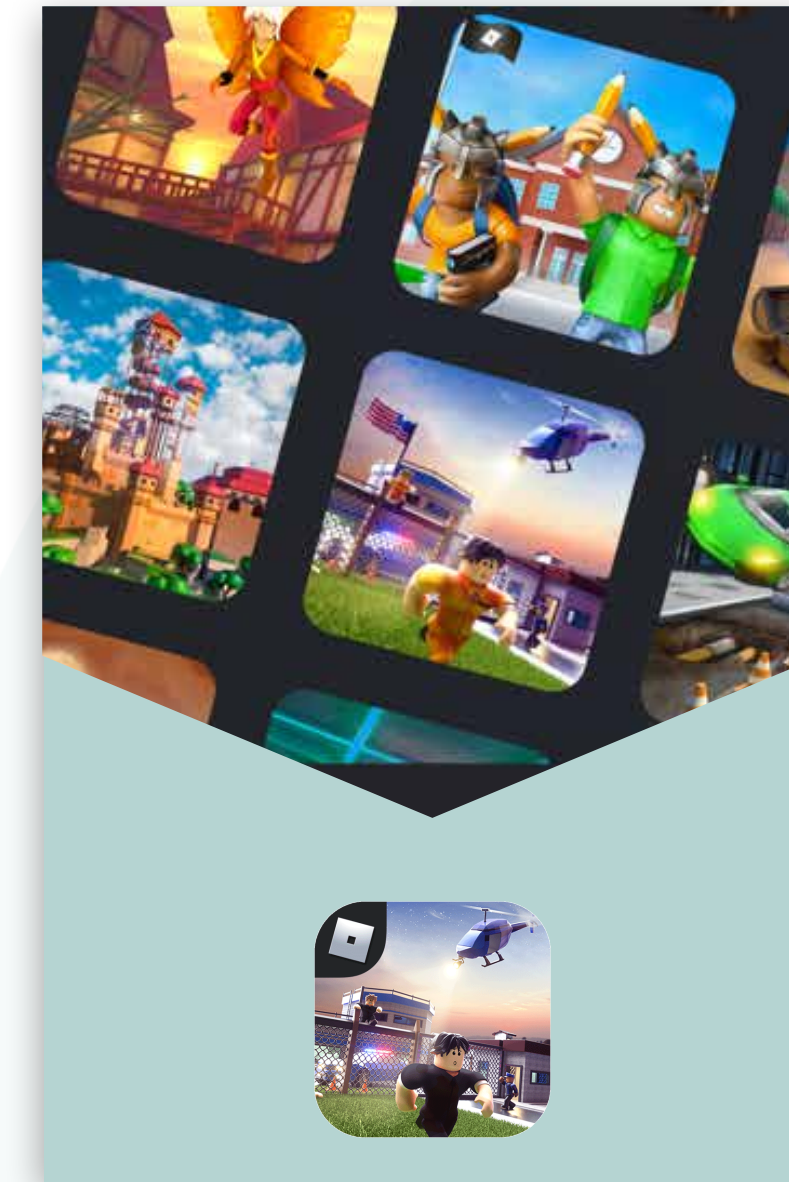
- 1  **Among Us** NEW
InnerSloth
- 2  **Roblox** +3
Roblox
- 3  **Call of Duty: Mobile** -2
Activision Blizzard
- 4  **Subway Surfers** NEW
Sybo Games
- 5  **Brain Test** NEW
Unico Studios
- 6  **Coin Master** NEW
Moon Active
- 7  **Magic Tiles 3** NEW
Amanotes
- 8  **Fishdom** NEW
Playrix
- 9  **Woodturning** NEW
Voodoo
- 10  **Tangle Master 3D** NEW
Zynga

1Q21

- 1  **Project Makeover** NEW
Magic Tavern
- 2  **High Heels** NEW
Zynga
- 3  **Among Us** -2
InnerSloth
- 4  **Roblox** -2
Roblox
- 5  **Crash Bandicoot: OTR** NEW
King
- 6  **Blob Runner 3D** NEW
Zynga
- 7  **Giant Rush** NEW
Tapnation
- 8  **Sushi Roll 3D** NEW
SayGames
- 9  **Oh God** NEW
Alictus
- 10  **Call of Duty: Mobile** -7
Activision Blizzard

Key Takeaways: U.S.

1. The U.S. was already the largest market for mobile games revenue and looks to likely hold this position for the foreseeable future. U.S. game revenue growth has exceeded the worldwide rate for each of the past three years, reaching 34 percent Y/Y growth in Q1 2021.
2. While game revenue continues to climb, expect more modest growth for U.S. mobile game adoption. U.S. game installs have mostly fallen off from the spike seen early in the pandemic. However, steady growth in 2019 plus a strong Q1 2021 suggests that the market may still see steady growth in the coming quarters.
3. The COVID-19 pandemic revealed how games can benefit from having a strong social component. Many multiplayer games like Roblox and Among Us had a breakthrough year in 2020.

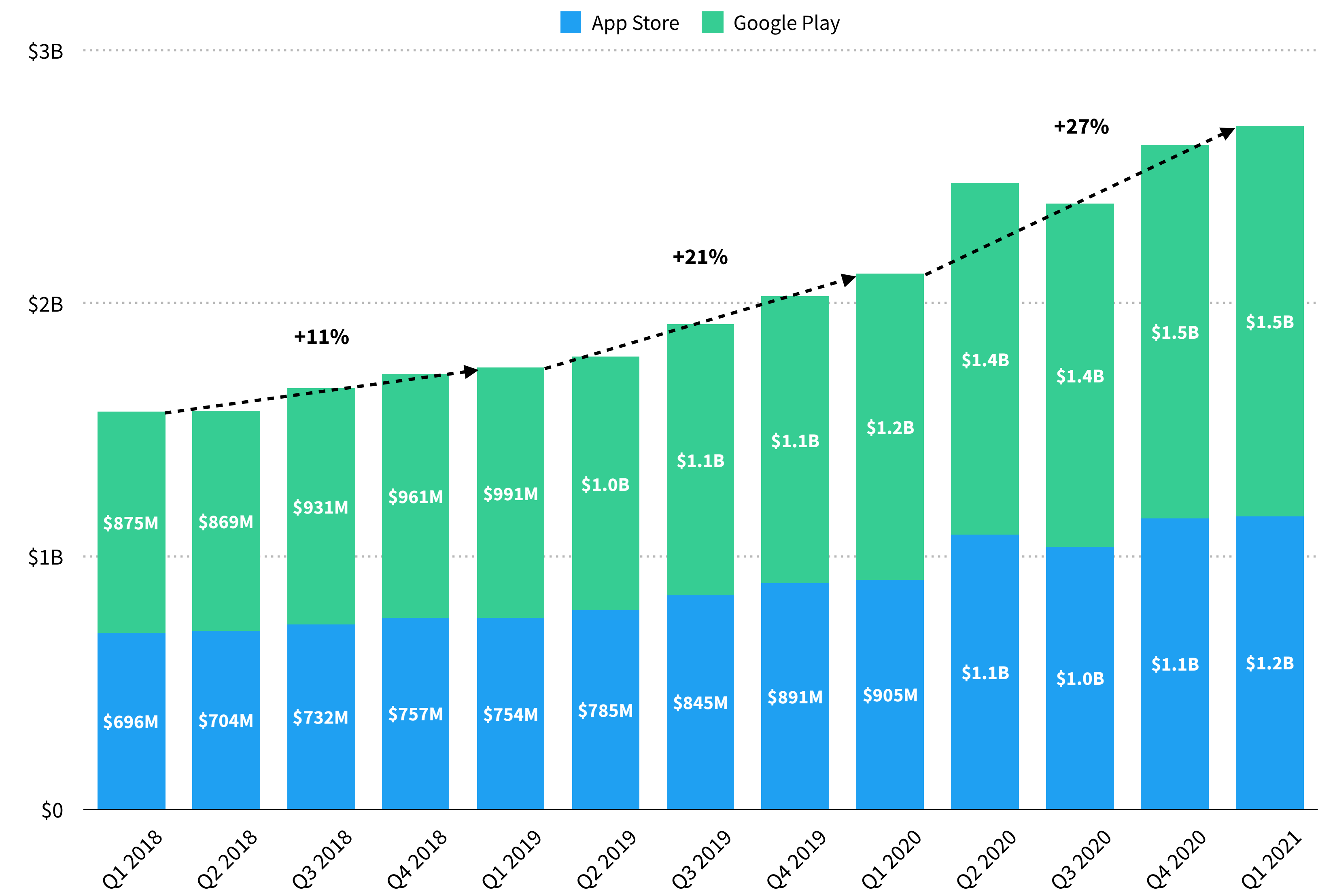


Market Overview: Europe

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An Overview of Mobile Gaming in Europe

The Pandemic Accelerated Europe’s Game Revenue Growth

Europe quarterly gross revenue from mobile games on the App Store and Google Play



Mobile game consumer spending in Europe reached \$2.7 billion in Q1 2021, an all-time high and up 27 percent year-over-year. Revenue was boosted during the pandemic, though to a lesser extent than in the U.S.



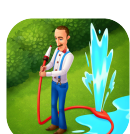




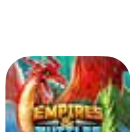


Growth was similar on both platforms, with App Store revenue up 28 percent Y/Y in Q1 2021 compared to 27 percent Y/Y growth on Google Play. Google Play still took the majority of spending between the two platforms.

Note:
Revenue figures are gross revenue (including the cut taken by Apple or Google).





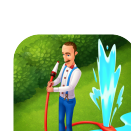
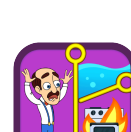




Coin Master Led All Mobile Games In Europe

Top mobile games by Europe revenue on the App Store and Google Play




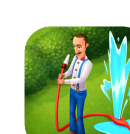

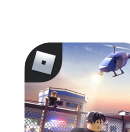

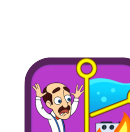

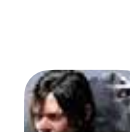
2018

1		Candy Crush Saga King
2		Clash Royale Supercell
3		Gardenscapes Playrix
4		Pokémon GO Niantic
5		Clash of Clans Supercell
6		Lords Mobile IGG
7		Homescapes Playrix
8		Empires & Puzzles Small Giant Games
9		Candy Crush Soda Saga King
10		Guns of Glory FunPlus



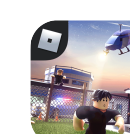


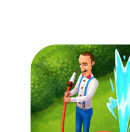
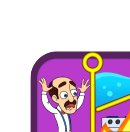



2019

1		Coin Master Moon Active	NEW
2		Candy Crush Saga King	-1
3		Clash of Clans Supercell	+2
4		Brawl Stars Supercell	NEW
5		Gardenscapes Playrix	-2
6		Homescapes Playrix	+1
7		Pokémon GO Niantic	-3
8		Empires & Puzzles Small Giant Games	-
9		Guns of Glory FunPlus	+1
10		Clash Royale Supercell	-8

2020

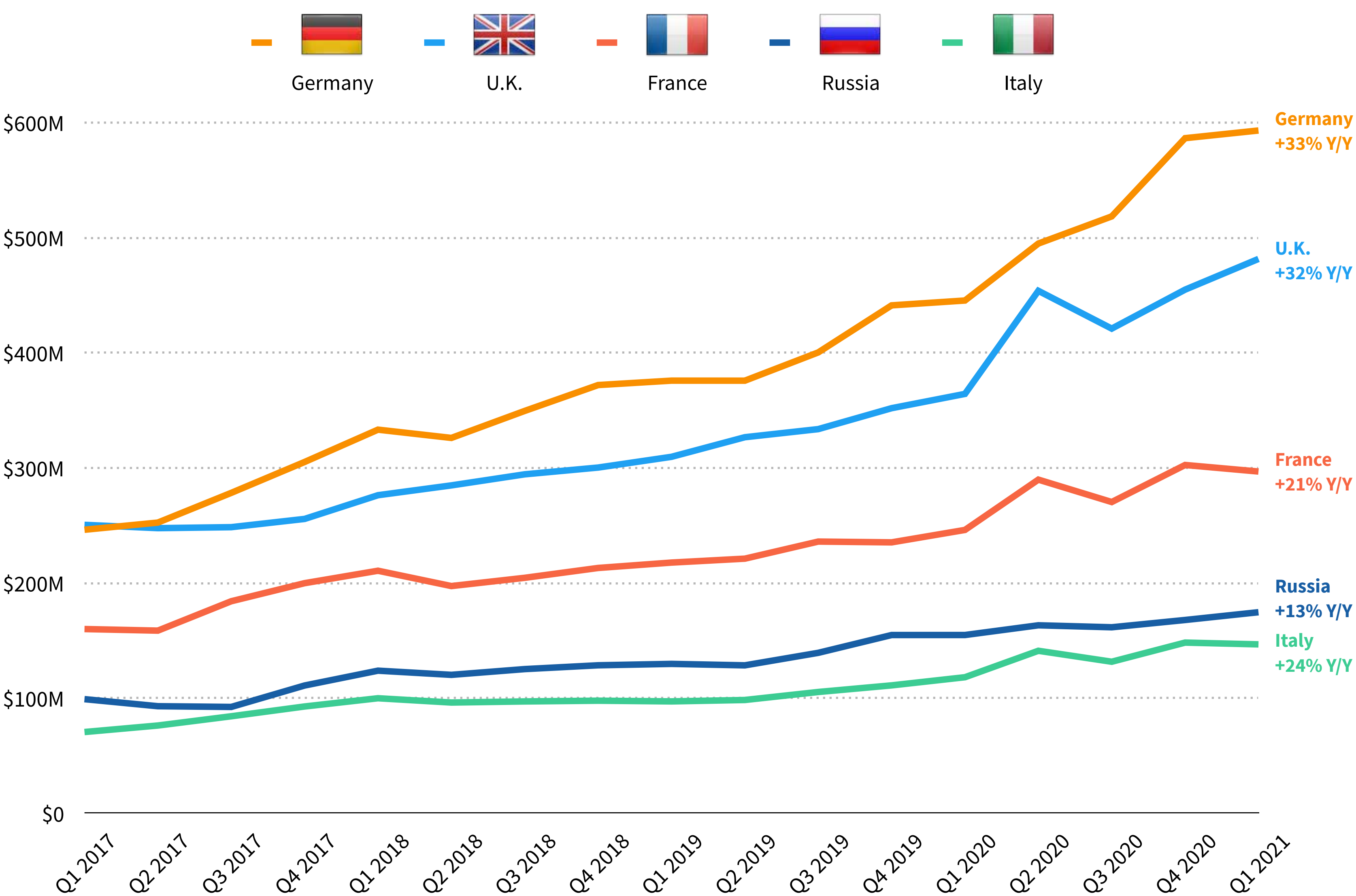
1		Coin Master Moon Active	-
2		Brawl Stars Supercell	+2
3		PUBG Mobile Tencent	NEW
4		Gardenscapes Playrix	+1
5		Pokémon GO Niantic	+2
6		Roblox Roblox	NEW
7		Candy Crush Saga King	-5
8		Homescapes Playrix	-2
9		Clash of Clans Supercell	-6
10		State of Survival FunPlus	NEW

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1		Coin Master Moon Active	-
2		PUBG Mobile Tencent	+1
3		Roblox Roblox	+3
4		State of Survival FunPlus	+6
5		Brawl Stars Supercell	-3
6		Gardenscapes Playrix	-2
7		Homescapes Playrix	+1
8		Pokémon GO Niantic	-3
9		Candy Crush Saga King	-2
10		Lords Mobile IGG	NEW

Germany Led Strong Revenue Growth in Europe

Top European countries by mobile game revenue, App Store and Google Play



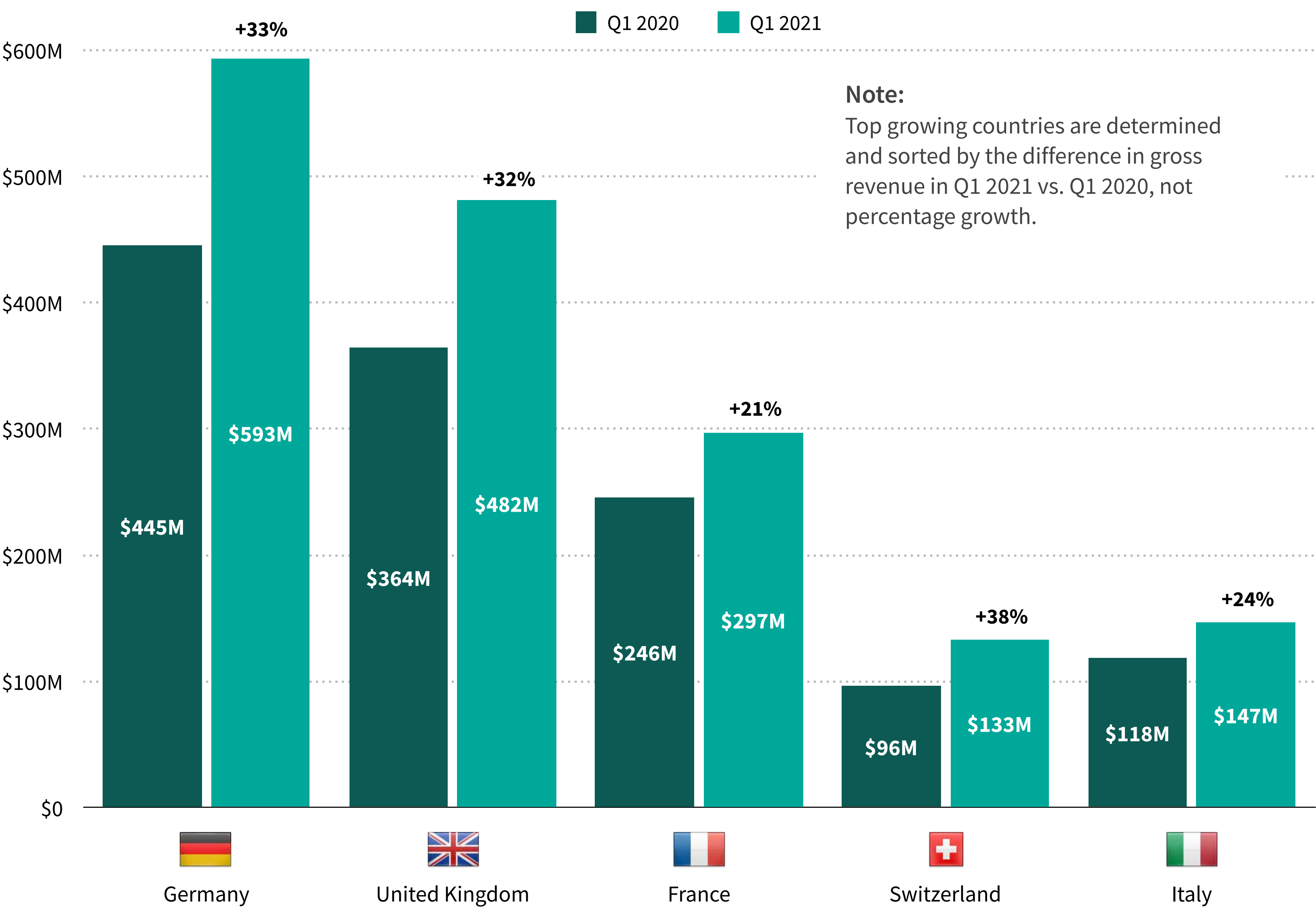
The mobile games market in Germany is booming, with user spending climbing from less than \$250 million in Q1 2017 to nearly \$600 million in Q1 2021. It had a compound annual growth rate (CAGR) of 25 percent over that period, higher growth than any of the other top countries in Europe.

The spikes in revenue during early lockdowns in response to COVID-19 were particularly evident in the U.K., France, and Italy. All three of these markets saw revenue dip after a strong Q2 2020 before climbing again in Q3.

Note:
Revenue figures are gross revenue (including the cut taken by Apple or Google).

Germany and the U.K. Saw Substantial Y/Y Revenue Growth

Top European countries by Y/Y game revenue growth in Q1 2021, App Store and Google Play



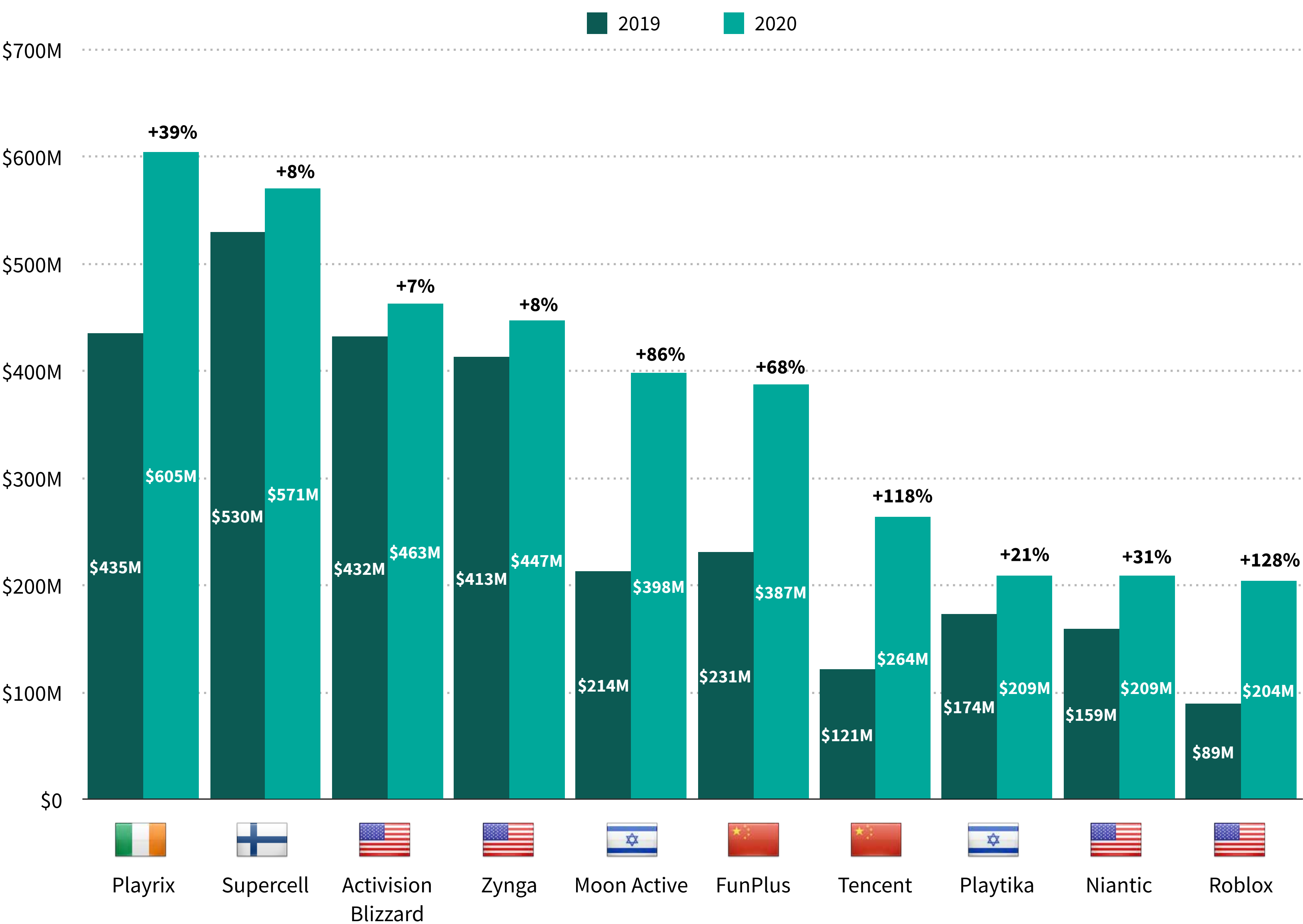
Germany’s mobile game revenue grew by nearly \$150 million Y/Y in Q1 2021, followed by the U.K. at \$118 million and France at \$51 million. No other country in Europe had Y/Y/ growth of more than \$40 million.

Switzerland, a smaller market in Europe, was among the top five by revenue growth with 38 percent Y/Y growth. Netherlands just missed the top five with revenue climbing by \$26 million Y/Y, or 39 percent.

Note:
Revenue figures are gross revenue (including the cut taken by Apple or Google).

Top Publishers by European Revenue are Based in the Region

Top games publishers by European revenue in 2020 on the App Store and Google Play



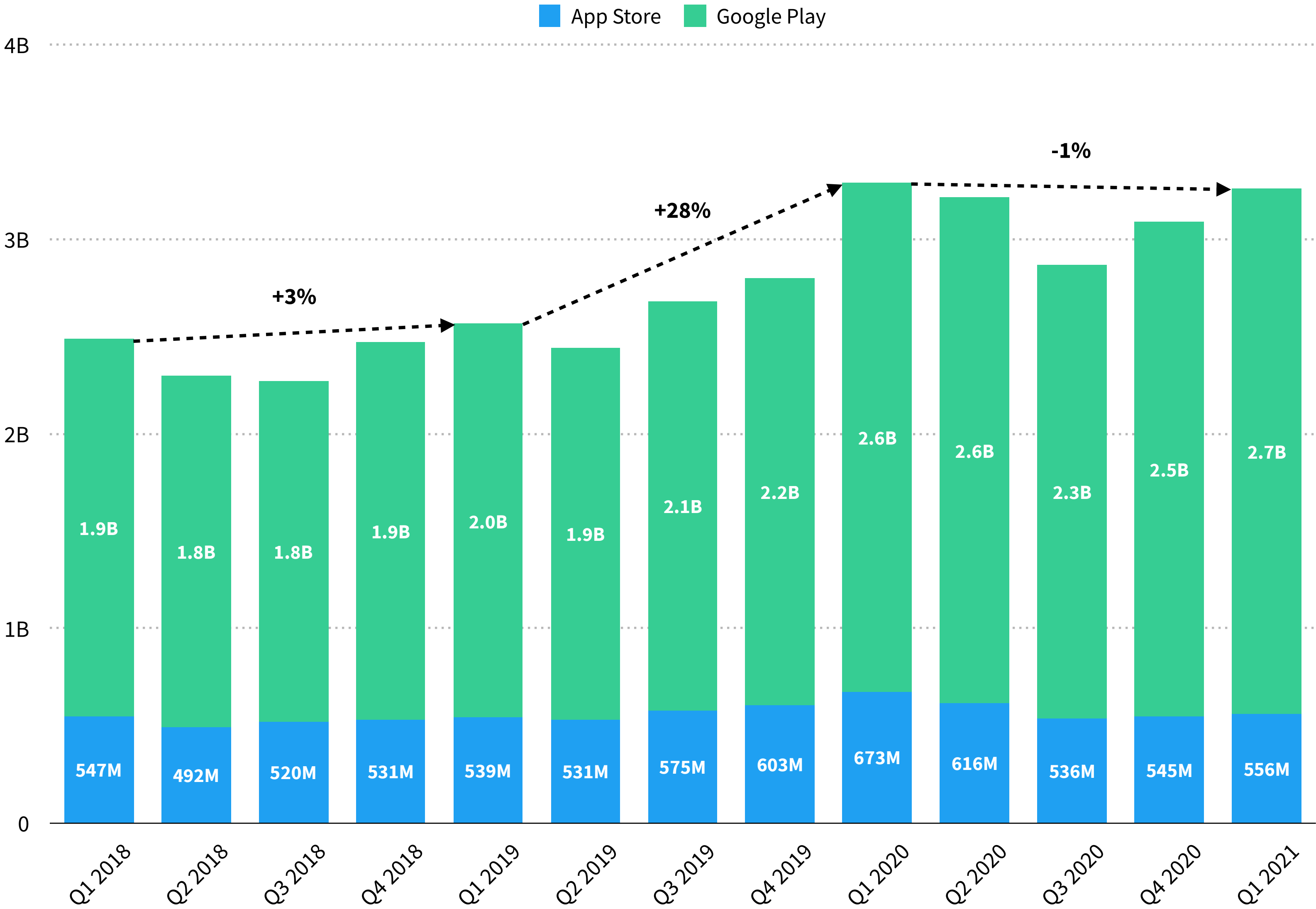
Two Europe-based publishers had the most revenue in Europe in 2020, with the popular puzzle and decorate developer Playrix and strategy game publisher Supercell leading the way. There were also two Israel-based publishers among the top 10.

Outside of Europe, publishers from the U.S. and China found the most success. Tencent and Roblox revenue in the region each grew by more than 100 percent.

Note:
Revenue figures are gross revenue (including the cut taken by Apple or Google).

European Game Installs Approached the Early Pandemic Peak

European quarterly downloads from mobile games on the App Store and Google Play








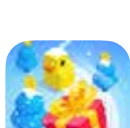




Q1 2021 mobile game installs in Europe were down just one percent from their peak in Q1 2020 at the start of the coronavirus pandemic. Downloads were above the pre-pandemic high for the past five quarters, suggesting that a portion of the pandemic boost will likely persist.

The majority of game installs in Europe were from Google Play. Mobile game adoption on Google Play reached a new high in Q1 2021, while App Store downloads fell 17 percent Y/Y.




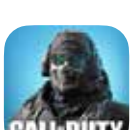




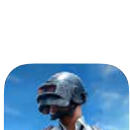

Many Hypercasual and Puzzle Titles Were Among the Top Games in Europe

Top mobile games by Europe downloads on the App Store and Google Play

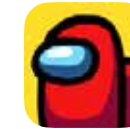

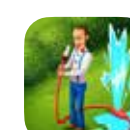



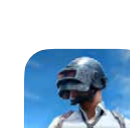



2018

- 1  **Helix Jump**
Voodoo
- 2  **Subway Surfers**
Sybo Games
- 3  **Love Balls**
Lion Studios
- 4  **Rise Up**
Serkan Ozyilmaz
- 5  **PUBG Mobile**
Tencent
- 6  **Paper.io 2**
Voodoo
- 7  **Knife Hit**
Ubisoft
- 8  **Kick the Buddy**
Playgendary
- 9  **Happy Glass**
Lion Studios
- 10  **Granny**
DVloper



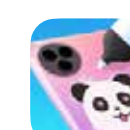


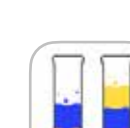
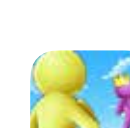
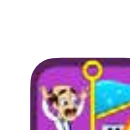


2019

- 1  **Brawl Stars**
Supercell **NEW**
- 2  **Color Bump 3D**
Good Job Games **NEW**
- 3  **Fun Race 3D**
Good Job Games **NEW**
- 4  **Call of Duty: Mobile**
Activision Blizzard **NEW**
- 5  **Homescapes**
Playrix **NEW**
- 6  **Run Race 3D**
Good Job Games **NEW**
- 7  **Sand Balls**
SayGames **NEW**
- 8  **Aquapark.io**
Voodoo **NEW**
- 9  **PUBG Mobile**
Tencent **-4**
- 10  **Subway Surfers**
Sybo Games **-8**

2020

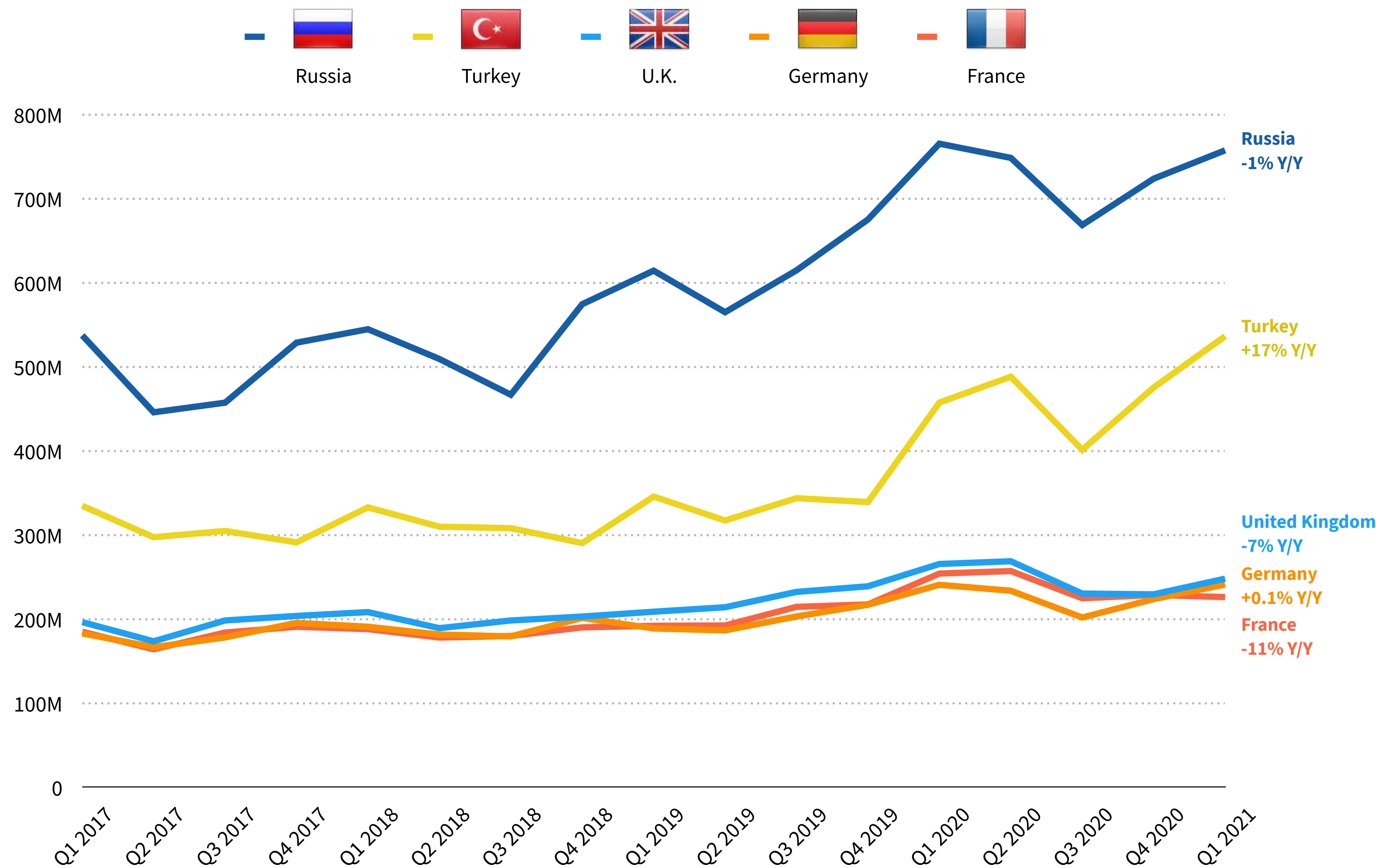
- 1  **Among Us**
InnerSloth **NEW**
- 2  **Brawl Stars**
Supercell **-1**
- 3  **Gardenscapes**
Playrix **NEW**
- 4  **Brain Test**
Unico Studios **NEW**
- 5  **Subway Surfers**
Sybo Games **+5**
- 6  **Roblox**
Roblox **NEW**
- 7  **PUBG Mobile**
Tencent **+2**
- 8  **Brain Out**
Focus Apps **NEW**
- 9  **Woodturning**
Voodoo **NEW**
- 10  **Tiles Hop**
Amanotes **NEW**

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- 1  **DOP 2**
SayGames **NEW**
- 2  **Among Us**
InnerSloth **-1**
- 3  **Phone Case DIY**
Crazy Labs **NEW**
- 4  **Join Clash 3D**
Supersonic Studios **NEW**
- 5  **Project Makeover**
Magic Tavern **NEW**
- 6  **Water Sort Puzzle**
Ice Global **NEW**
- 7  **Giant Rush**
Tapnation **NEW**
- 8  **Homescapes**
Playrix **+5**
- 9  **Brawl Stars**
Supercell **-7**
- 10  **Stacky Dash**
Supersonic Studios **NEW**

Russia and Turkey Drove European Game Downloads

Top European countries by mobile game downloads, App Store and Google Play

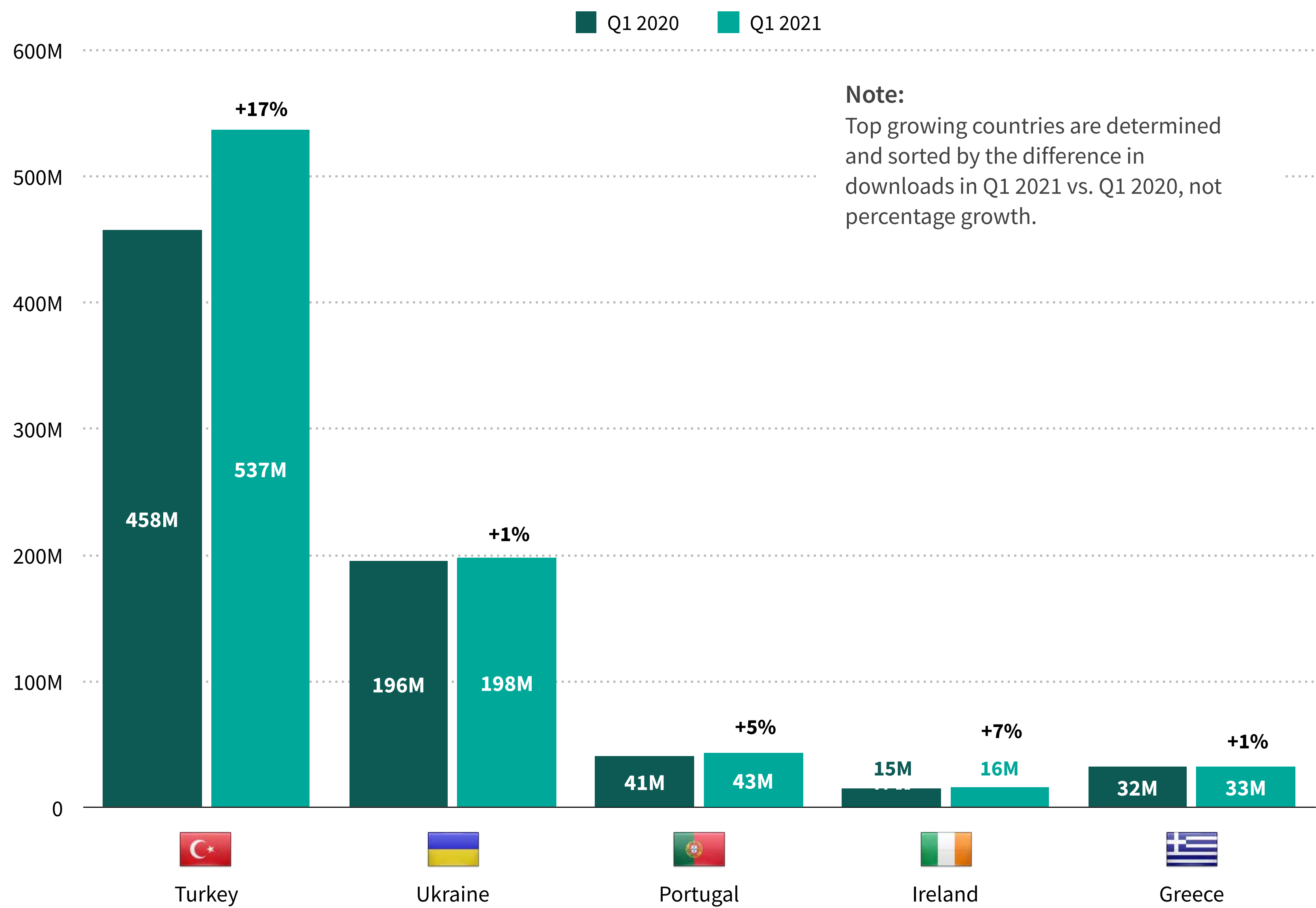


Russia was the top European market in Q1 2021 with 758 million downloads, followed by Turkey at 537 million installs. This was more than double the No. 3 market, the U.K., which had 248 million downloads in the quarter.

Many of the top countries in Europe saw downloads decline year-over-year from the early pandemic highs in Q1 2020. Turkey was a notable exception with 17 percent Y/Y growth, and Germany also managed to experience slightly positive growth.

Turkey Led Download Growth in Europe

Top European countries by Y/Y game download growth in 1Q21, App Store and Google Play



As overall downloads in Europe decreased one percent year-over-year in Q1 2021, most countries saw little to no growth. **Turkey was the exception, with downloads up by nearly 80 million.**

The rest of the top countries by growth were smaller markets such as **Ukraine, Portugal, and Ireland**. Only eight countries in Europe had positive Y/Y growth in Q1 2021.

Key Takeaways: Europe

1. Mobile game revenue also accelerated in Europe in 2020, reaching a record \$2.7 billion in Q1 2021 with 27 percent year-over-year growth. While this Y/Y growth was lower than in the U.S. (which saw a particularly pronounced boost from COVID-19), it was still slightly higher than the global growth rate.
2. Germany, the top European country by mobile game revenue, reached nearly \$600 million in consumer spending in Q1 2021. Revenue growth was strong across top European markets, with the U.K., France, and Italy joining Germany with more than 20 percent Y/Y revenue growth in Q1 2021.
3. Mobile game installs in Q1 2021 were just 1 percent lower than their peak from Q1 2020. However, most countries have seen installs decline from this pandemic-fueled peak, with Turkey as a notable exception.



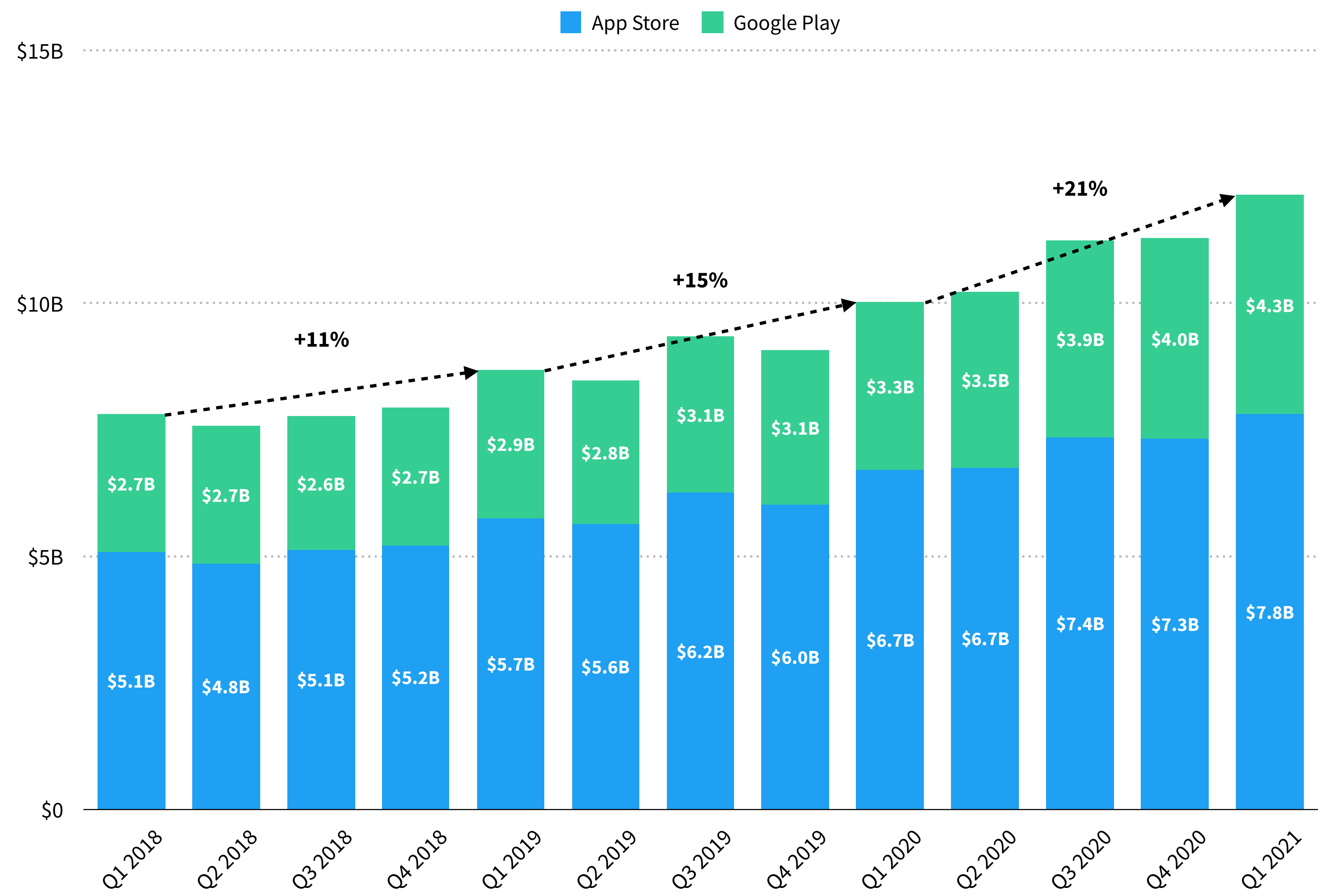
Market Overview:

Asia

—
An Overview of Mobile Gaming in Asia

Asia’s Game Revenue Growth is Picking Up

Asia’s quarterly gross revenue from mobile games on the App Store and Google Play



Asia’s mobile game revenue surpassed \$12 billion for the first time in Q1 2021, up 21 percent year-over-year Growth has only accelerated in recent years.








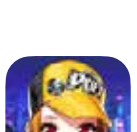


Mobile game revenue growth in Asia lagged behind that seen in the U.S. and Europe. Still, it remains by far the largest region for mobile game revenue, led by China and Japan.

Note:
Revenue figures are gross revenue (including the cut taken by Apple or Google).










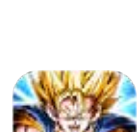
Genshin Impact Emerged as a Top Game in Asia with a Strong Q1 2021

Top mobile games by Asia revenue on the App Store and Google Play










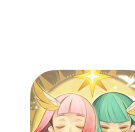
2018

1		Honor of Kings Tencent
2		Monster Strike Mixi
3		Fate/Grand Order Sony
4		LineageM NCSOFT
5		Fantasy WW Journey NetEase
6		Puzzle & Dragons GungHo
7		Knives Out NetEase
8		QQ Speed Tencent
9		Lineage2 Revolution Netmarble
10		DBZ Dokkan Battle Bandai Namco





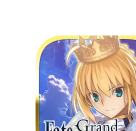
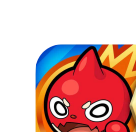
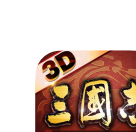



2019

1		Honor of Kings Tencent	-
2		Fate/Grand Order Sony	+1
3		PUBG Mobile Tencent	NEW
4		Monster Strike Mixi	-2
5		Fantasy WW Journey NetEase	-
6		LineageM NCSOFT	-2
7		Puzzle & Dragons GungHo	-1
8		Perfect World Tencent	NEW
9		Knives Out NetEase	-2
10		DBZ Dokkan Battle Bandai Namco	-

2020

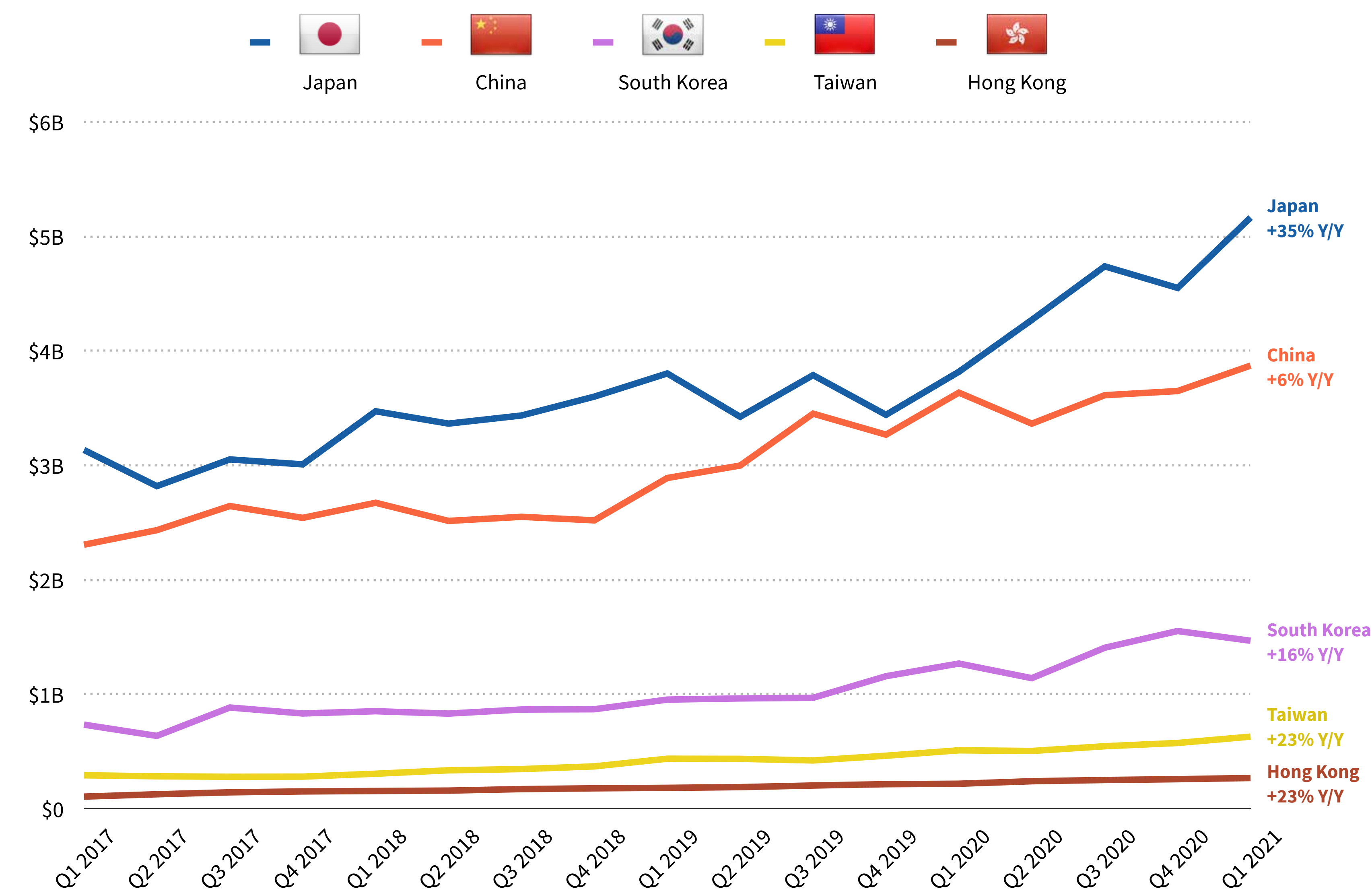
1		Honor of Kings Tencent	-
2		PUBG Mobile Tencent	+1
3		Monster Strike Mixi	+1
4		Fate/Grand Order Sony	-2
5		3 Kingdoms Tactics Alibaba	NEW
6		LineageM NCSOFT	-
7		Lineage2M NCSOFT	NEW
8		Fantasy WW Journey NetEase	-3
9		Knives Out NetEase	-
10		AFK Arena Lilith Games	NEW

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1		Honor of Kings Tencent	-
2		PUBG Mobile Tencent	-
3		Genshin Impact miHoYo	NEW
4		LineageM NCSOFT	+2
5		Fate/Grand Order Sony	-1
6		Monster Strike Mixi	-3
7		3 Kingdoms Tactics Alibaba	-2
8		Pro Baseball Spirits A Konami	NEW
9		Puzzle & Dragons GungHo	+4
10		Fantasy WW Journey NetEase	-2

Japan’s Game Revenue Surpassed \$5 Billion in Q1 2021

Top Asian countries by mobile game revenue, App Store and Google Play



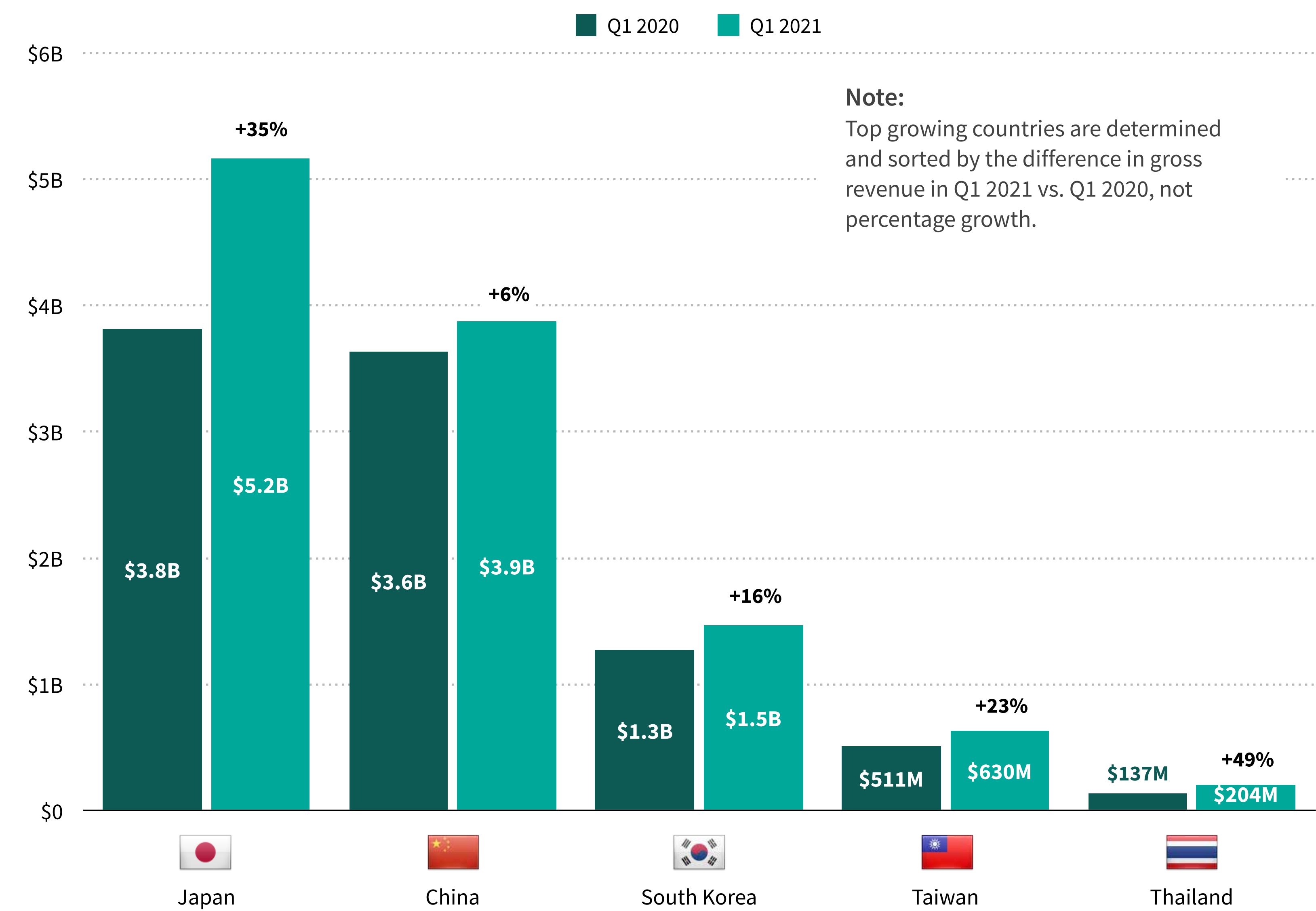
Four of the top five countries globally by mobile game revenue are in Asia, with the U.S. as the only exception. Japan surpassed \$5 billion in Q1 2021, followed by China at \$3.9 billion and South Korea at \$1.5 billion.

While China’s mobile game adoption has decreased in recent years, revenue has continued to grow. Note that China’s revenue also only includes the App Store, as Google Play is not available in the country.

Note: Revenue figures are gross revenue (including the cut taken by Apple or Google). China numbers only include the App Store as Google Play is not available there.

Japan Saw 35 Percent Y/Y Revenue Growth in Q1 2021

Top Asian countries by Y/Y game revenue growth in Q1 2021, App Store and Google Play

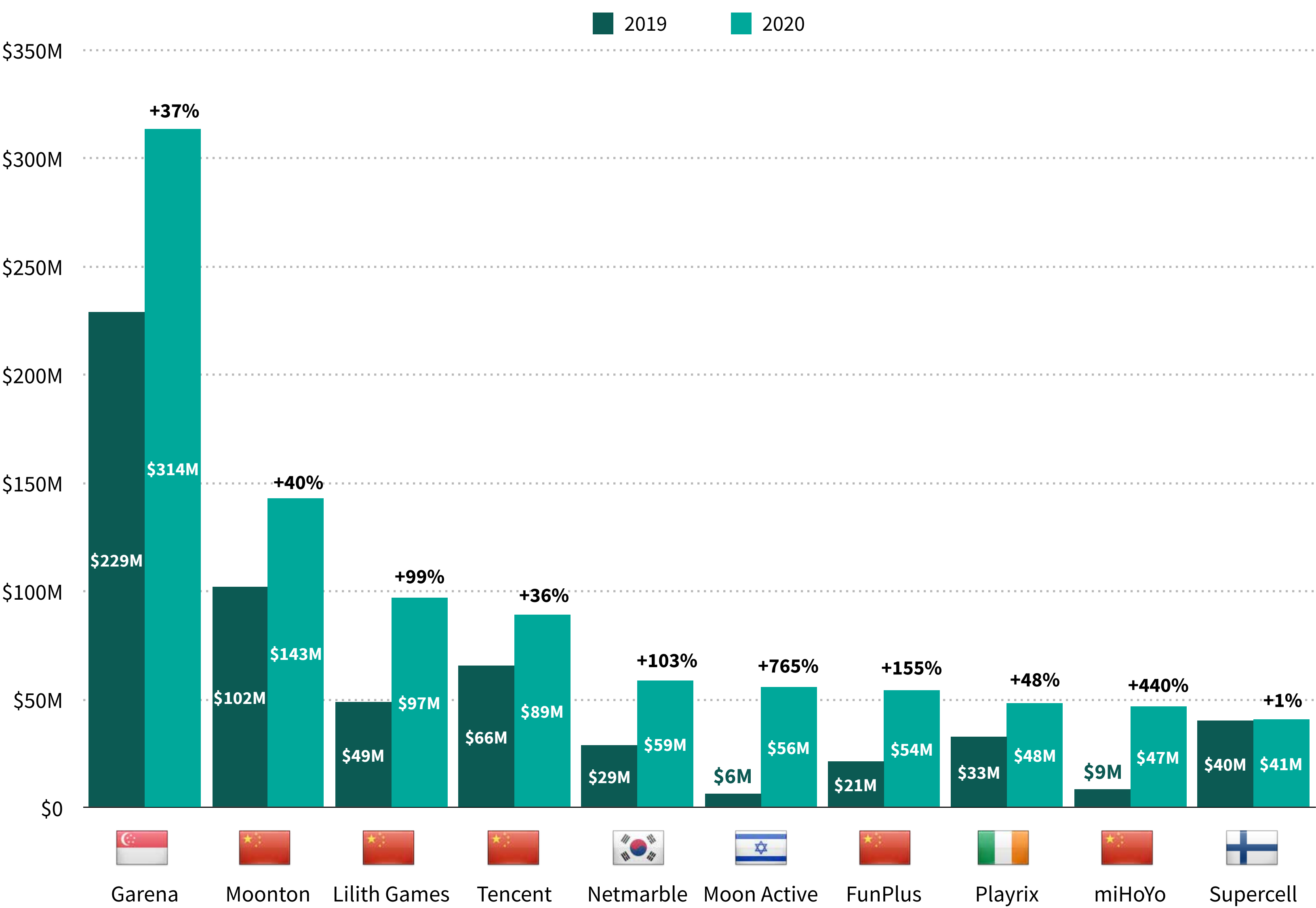


Japan’s game revenue increased by more than \$1.3 billion in Q1 2021 vs. Q1 2020, an increase of 35 percent. China, the No. 2 country by growth, was well behind with year-over-year growth of \$236 million.

Thailand was the No. 5 country in Asia by growth, with user spending up nearly 50 percent Y/Y. Spending surpassed \$200 million in the country for the first time, more than double the total from just two years prior in Q1 2019.

Half of the Top SEA Publishers are Based in China

Top games publishers by SEA revenue in 2020 on the App Store and Google Play



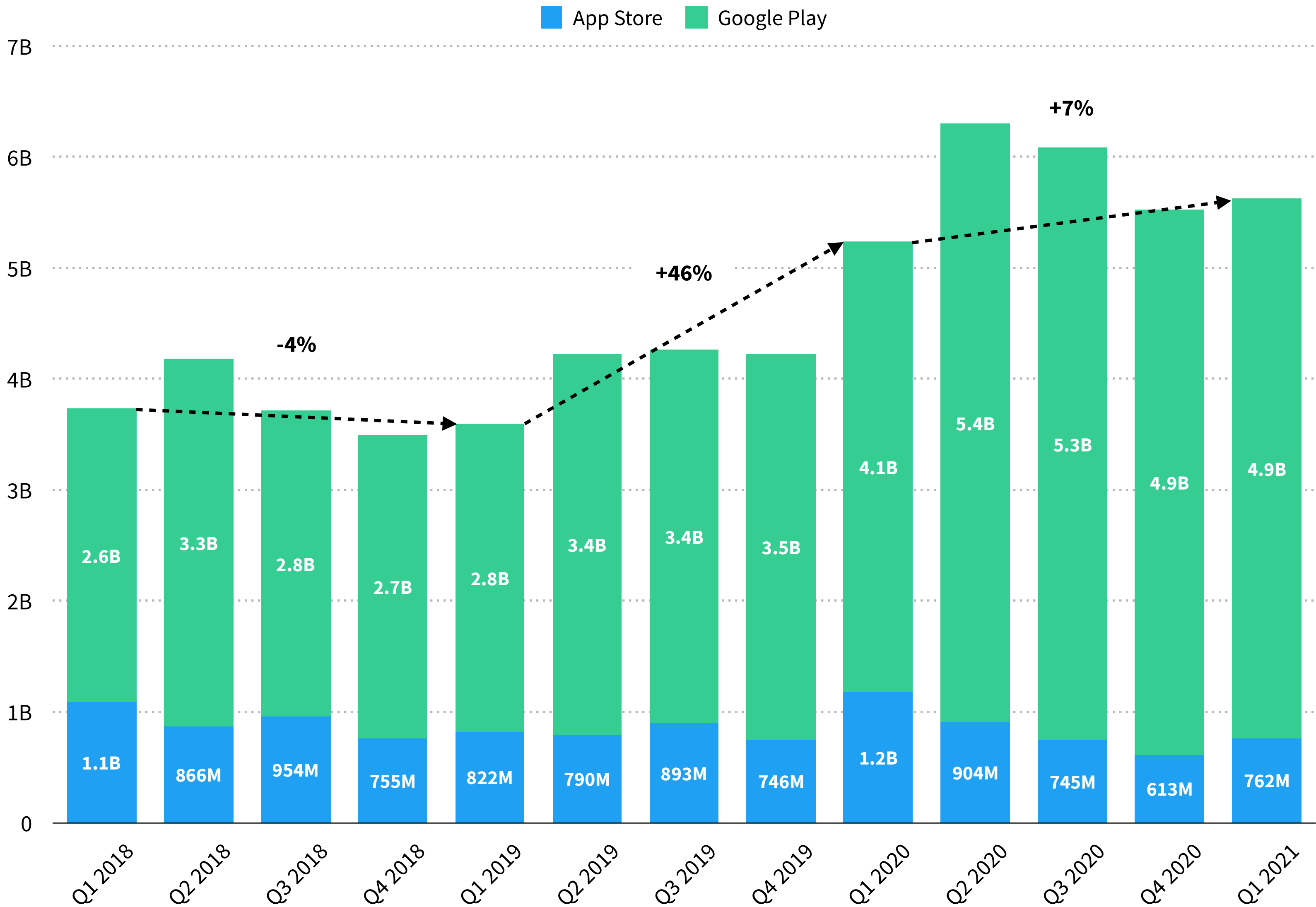
Singapore-based Garena remained the dominant publisher in Southeast Asia (SEA) with more than double the revenue of the next closest publisher (Moonton). It had strong revenue growth at 37 percent year-over-year.

China represented half of the top 10 publishers by revenue in SEA in 2020. Interestingly, half of the top 10 publishers in SEA were also among the top 10 in Europe: Tencent, Moon Active, FunPlus, Playrix, and Supercell.

Note:
Revenue figures are gross revenue (including the cut taken by Apple or Google).

Asia’s Mobile Game Adoption Surged in 2020

Asia’s quarterly downloads from mobile games on the App Store and Google Play











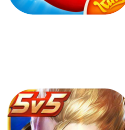
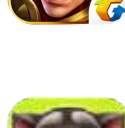
Quarterly mobile game downloads in Asia surpassed 5 billion for the first time in Q1 2020, and then climbed to 6.3 billion in Q2 2020. Although installs dropped off a bit from this peak, they still surpassed 5.5 billion for each of the next three quarters.

The vast majority of game installs in Asia came from Google Play, driven largely by countries like India and Indonesia where Android phones are much more popular than iPhones. About 86 percent of the downloads in Q1 2021 were from Google Play, up from 71 percent in Q1 2018.






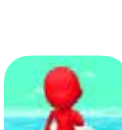



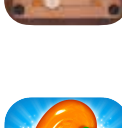
Top Battle Royale Games Were Popular in Asia

Top mobile games by Asia downloads on the App Store and Google Play




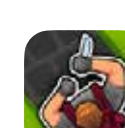



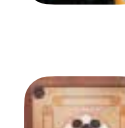
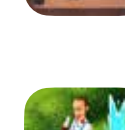
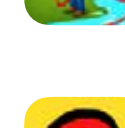
2018

1		PUBG Mobile Tencent
2		Ludo King Gametion
3		Subway Surfers Sybo Games
4		Helix Jump Voodoo
5		Garena Free Fire Garena
6		Mobile Legends: Bang Bang Moonton
7		Temple Run 2 Imangi Studios
8		Candy Crush Saga King
9		Honor of Kings Tencent
10		My Talking Tom Outfit7




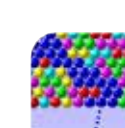




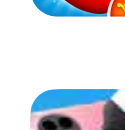
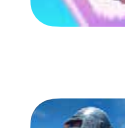
2019

1		PUBG Mobile Tencent	-
2		Garena Free Fire Garena	+3
3		Ludo King Gametion	-1
4		Subway Surfers Sybo Games	-1
5		Mobile Legends: Bang Bang Moonton	+1
6		Fun Race 3D Good Job Games	NEW
7		My Talking Tom 2 Outfit7	NEW
8		Temple Run 2 Imangi Studios	-1
9		Carrom Pool Miniclip	NEW
10		Candy Crush Saga King	-2

2020

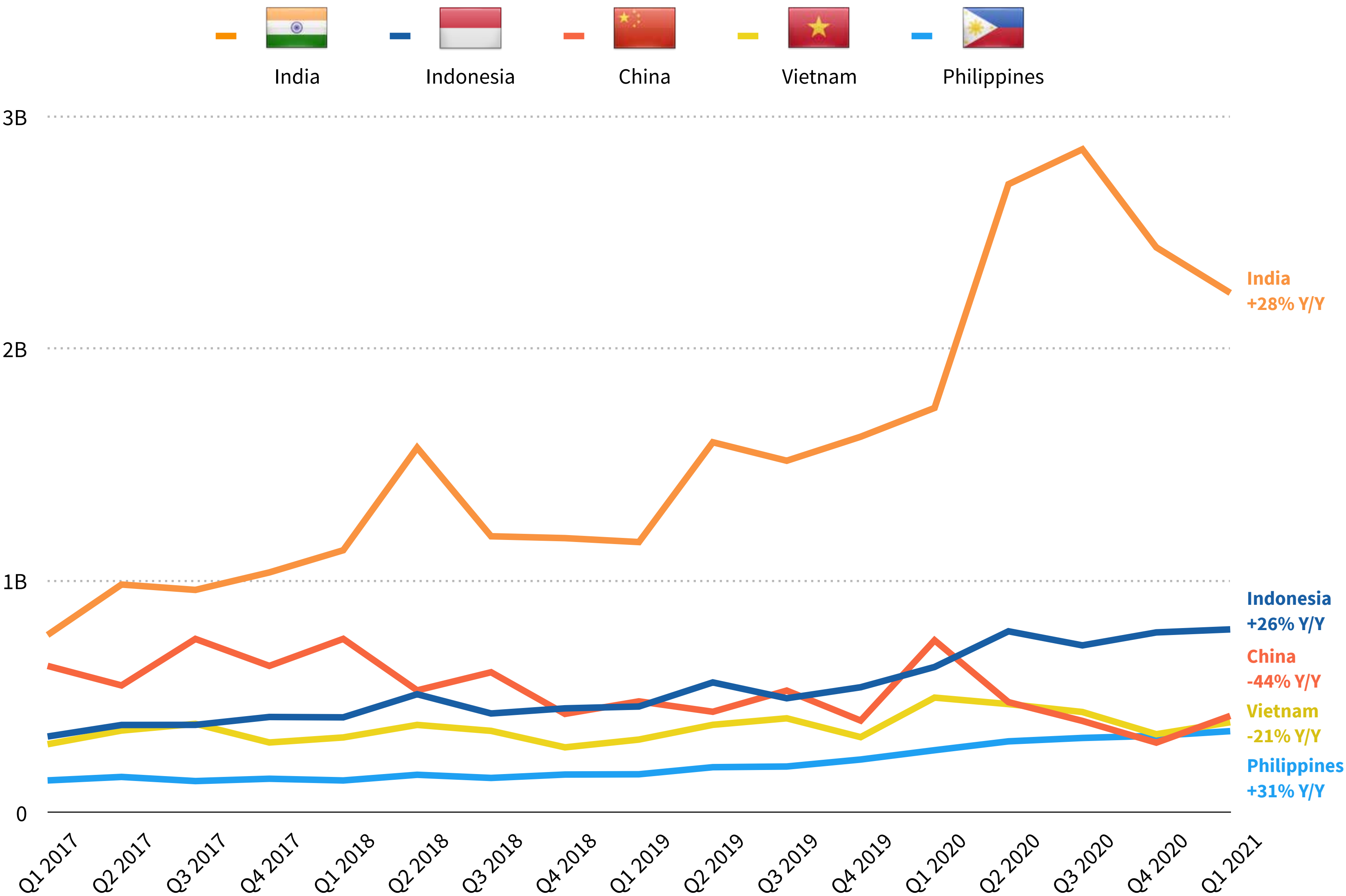
1		Ludo King Gametion	+2
2		Garena Free Fire Garena	-
3		PUBG Mobile Tencent	-2
4		Hunter Assassin Ruby Games	NEW
5		Subway Surfers Sybo Games	-1
6		Brain Out Focus Apps	NEW
7		Worms Zone.io Azur Interactive	NEW
8		Carrom Pool Miniclip	+1
9		Gardenscapes Playrix	NEW
10		Among Us InnerSloth	NEW

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1		Join Clash 3D Supersonic Studios	NEW
2		Ludo King Gametion	-1
3		Garena Free Fire Garena	-1
4		Bubble Shooter Miniclip	NEW
5		Subway Princess Runner Ivy	NEW
6		Subway Surfers Sybo Games	-1
7		Worms Zone.io Azur Interactive	-
8		Candy Crush Saga King	+4
9		Phone Case DIY Crazy Labs	NEW
10		PUBG Mobile Tencent	-7

India's Game Installs Dwarfed All Other Markets

Top Asian countries by mobile game downloads, App Store and Google Play



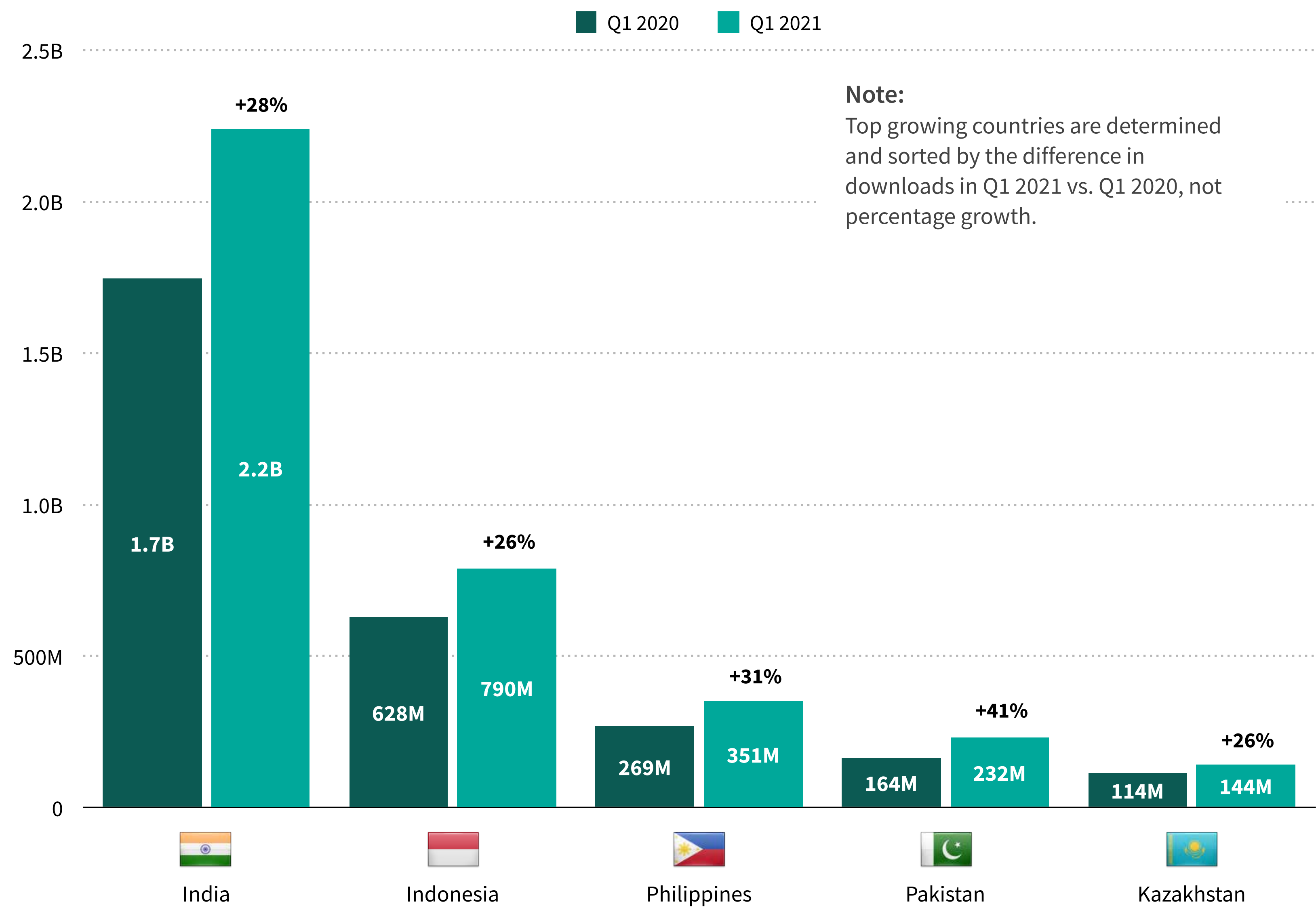
India is the largest mobile games market by downloads in the world. It has seen rapid growth since the start of 2019, climbing from 1.2 billion in Q1 2019 to nearly 2.9 billion in Q3 2020.

Indonesia has also experienced strong growth of 26 percent year-over-year in Q1 2021. China's installs have declined since 2017, with a surge at the start of COVID-19 in Q1 2020 as an exception. However, China's mobile game user spending has continued to climb despite its decline in adoption.

Note:
China numbers only include the App Store as Google Play is not available there.

India and Indonesia Top Install Growth in Asia

Top Asian countries by Y/Y game download growth in Q1 2021, App Store and Google Play



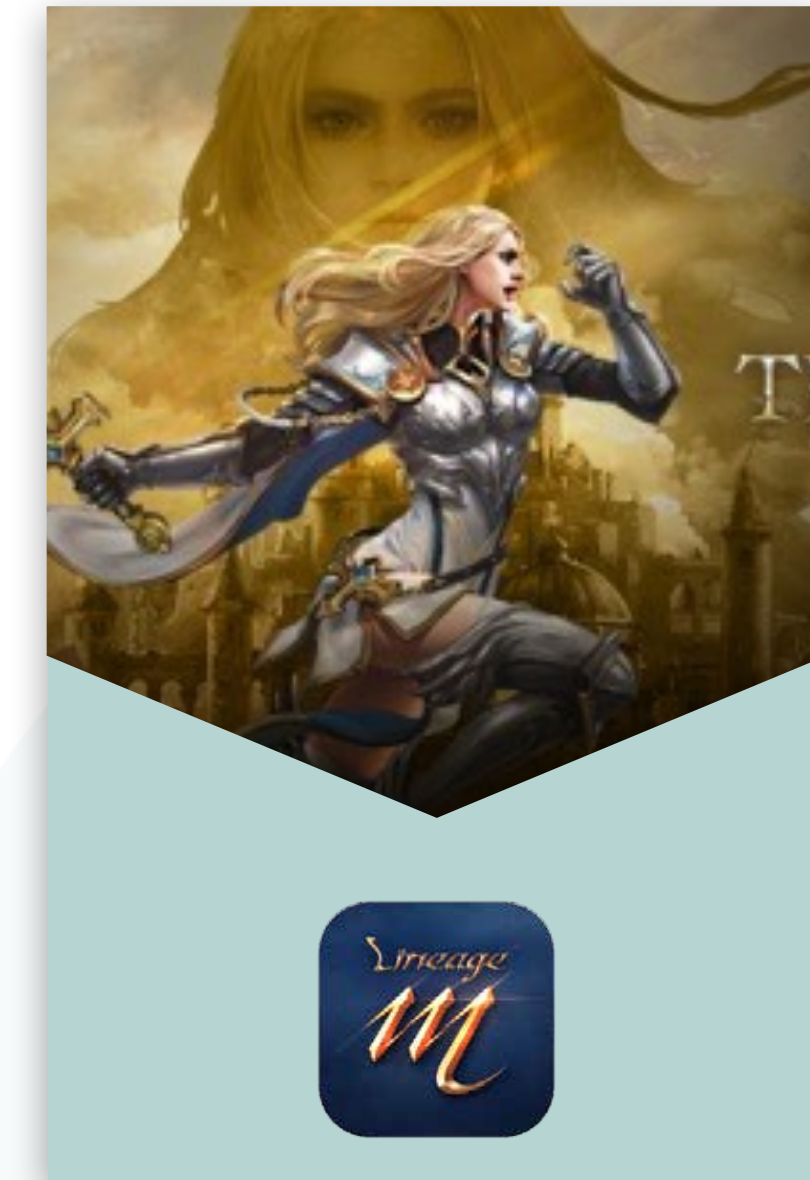
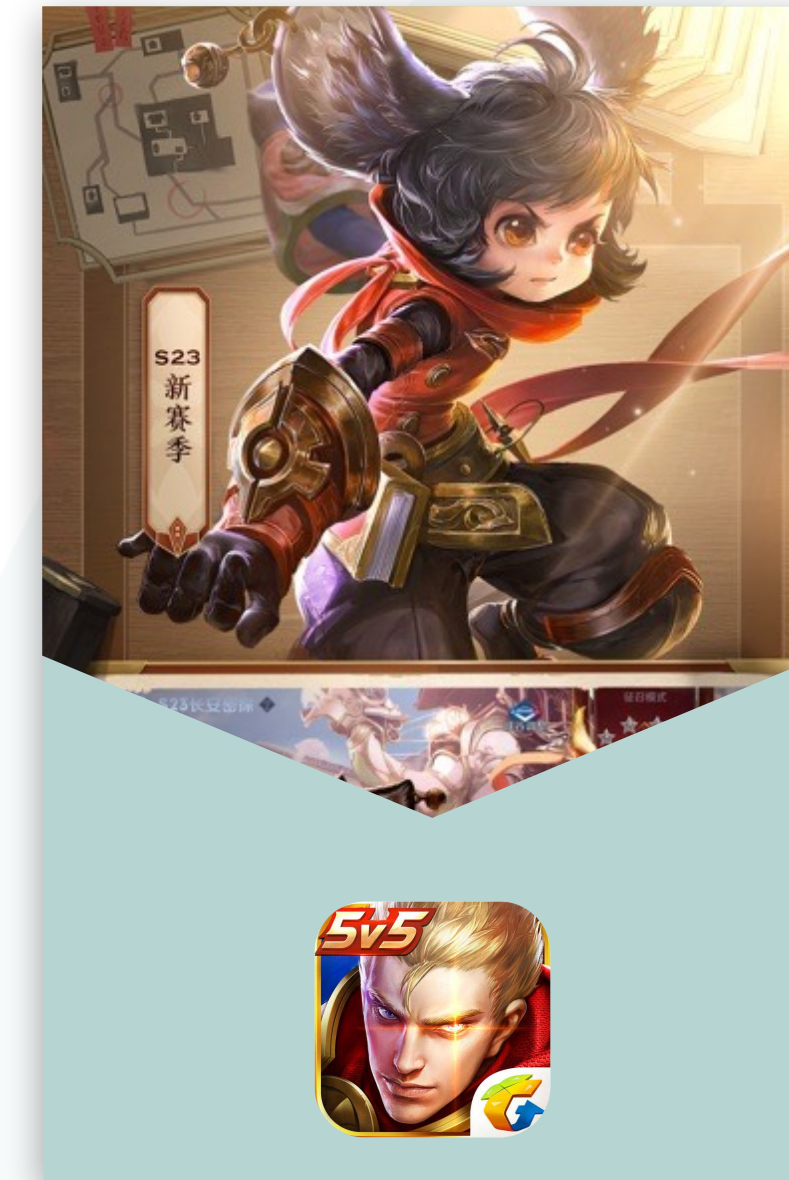
Mobile game installs in India have grown by roughly half a billion year-over-year in Q1 2021. Indonesia was the only other country with growth of more than 100 million downloads.

Pakistan, the No. 7 country in Asia by downloads in Q1 2021, was No. 4 by Y/Y growth that quarter. Kazakhstan, the 10th largest market in Asia by downloads, was another notable country with strong Y/Y growth.

Key Takeaways:

Asia

1. **Asia is the top region for mobile games.** Mobile game consumer spending surpassed \$12 billion there for the first time in Q1 2021, an increase of 21 percent year-over-year. Asia's mobile game revenue growth accelerated during COVID-19, similar to the pattern seen in other regions.
2. **Four of the top five countries by mobile game revenue are in Asia, including Japan, China, and South Korea.** Japan has seen particularly strong growth in recent quarters, as its revenue has climbed 35 percent Y/Y in Q1 2021.
3. **India is the primary driver of mobile game download trends in Asia, reaching nearly 3 billion installs in Q3 2020.** Some other countries including Indonesia, Philippines, and Pakistan have also seen really strong download growth.

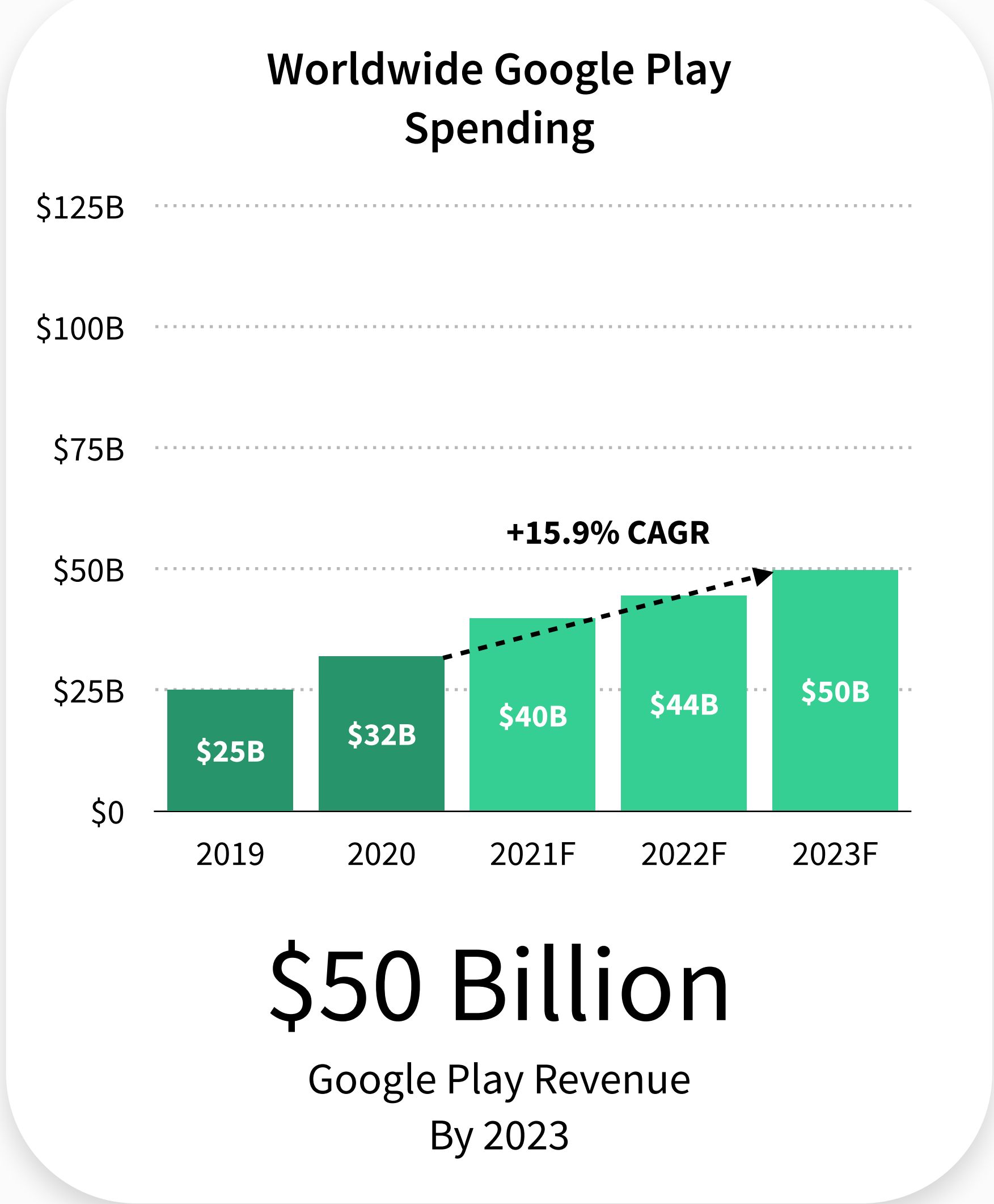
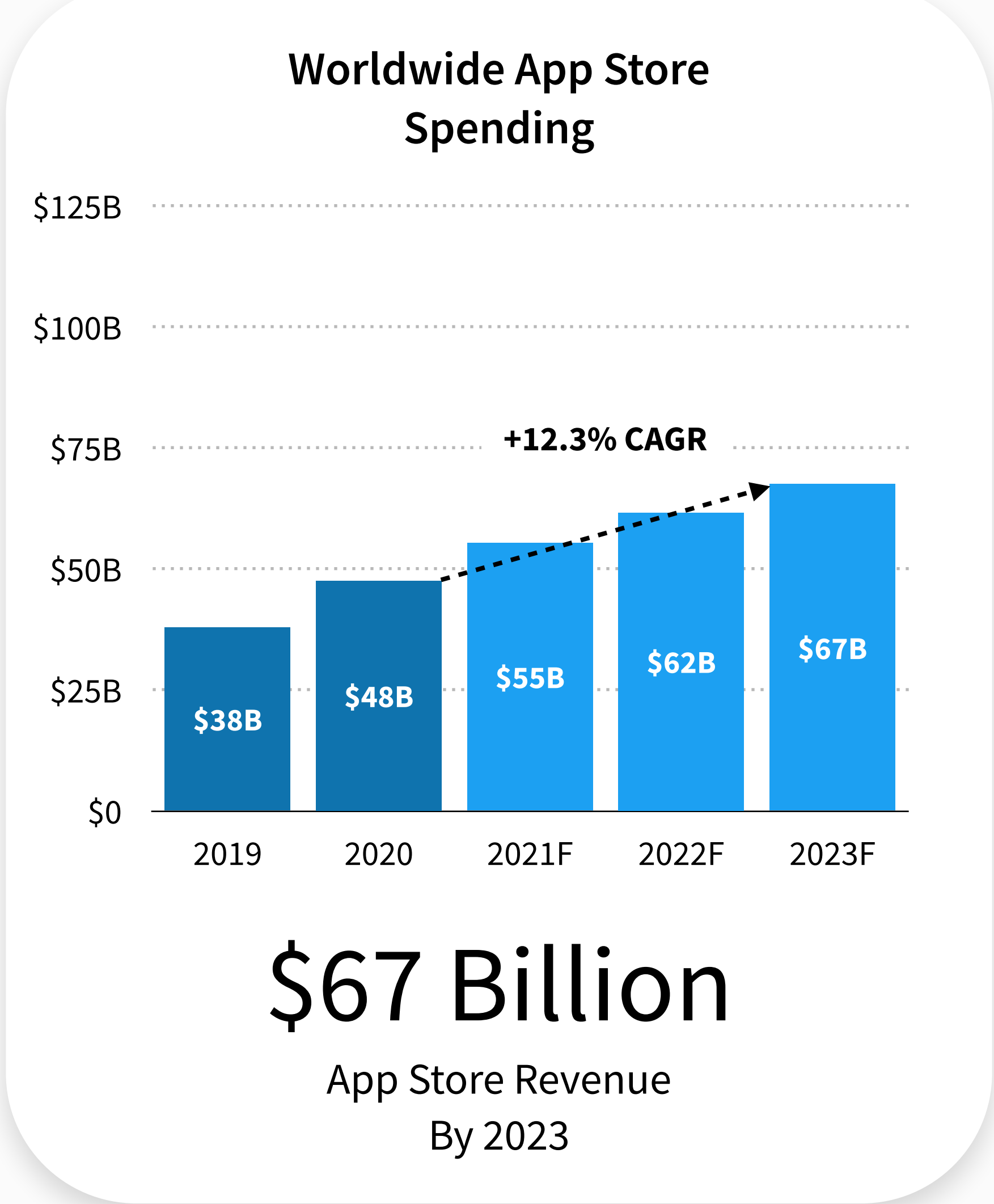
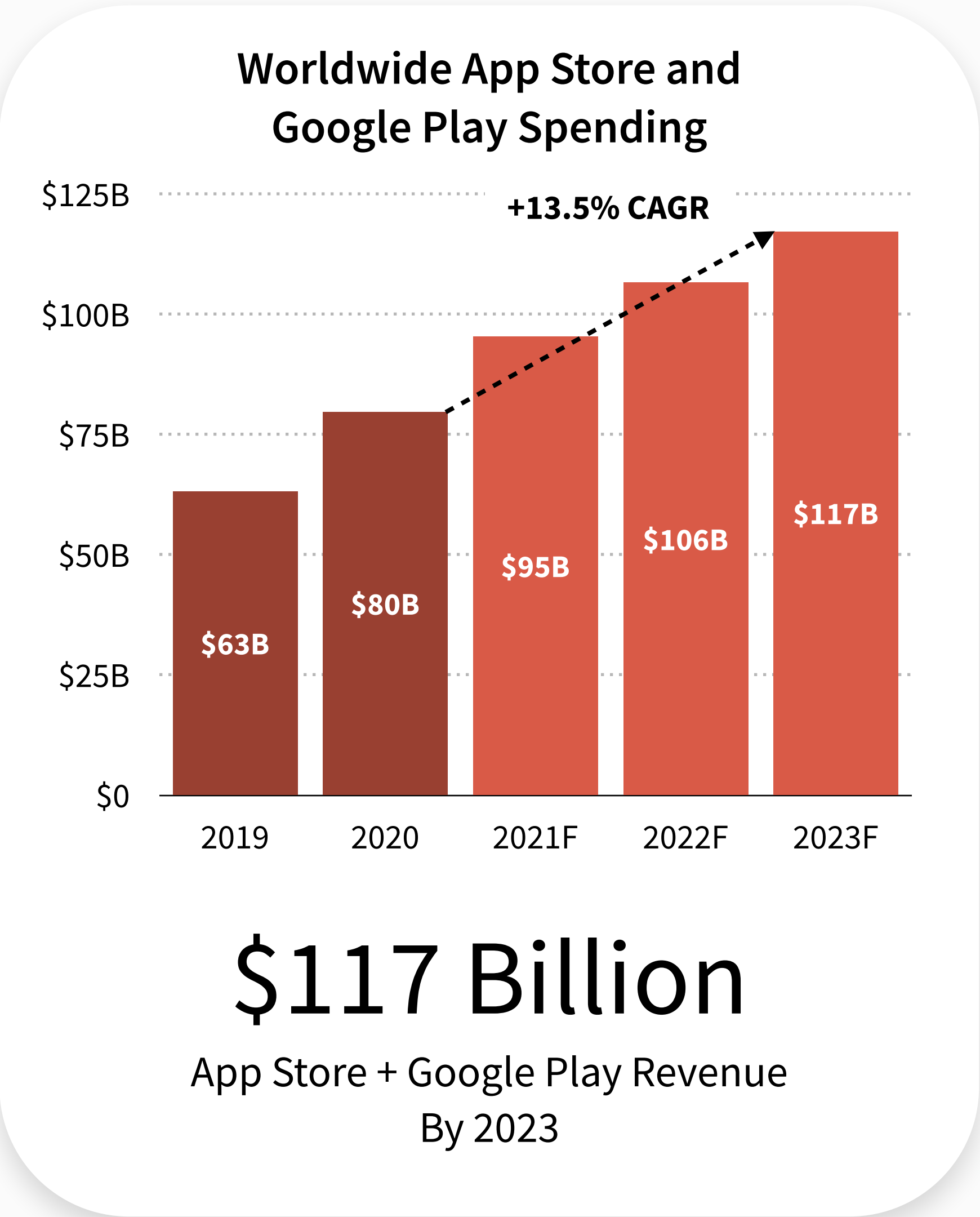


Market Forecast:

3-Year Revenue and Download Forecast

Consumer Spending in Mobile Games Will Reach \$117 Billion by 2023

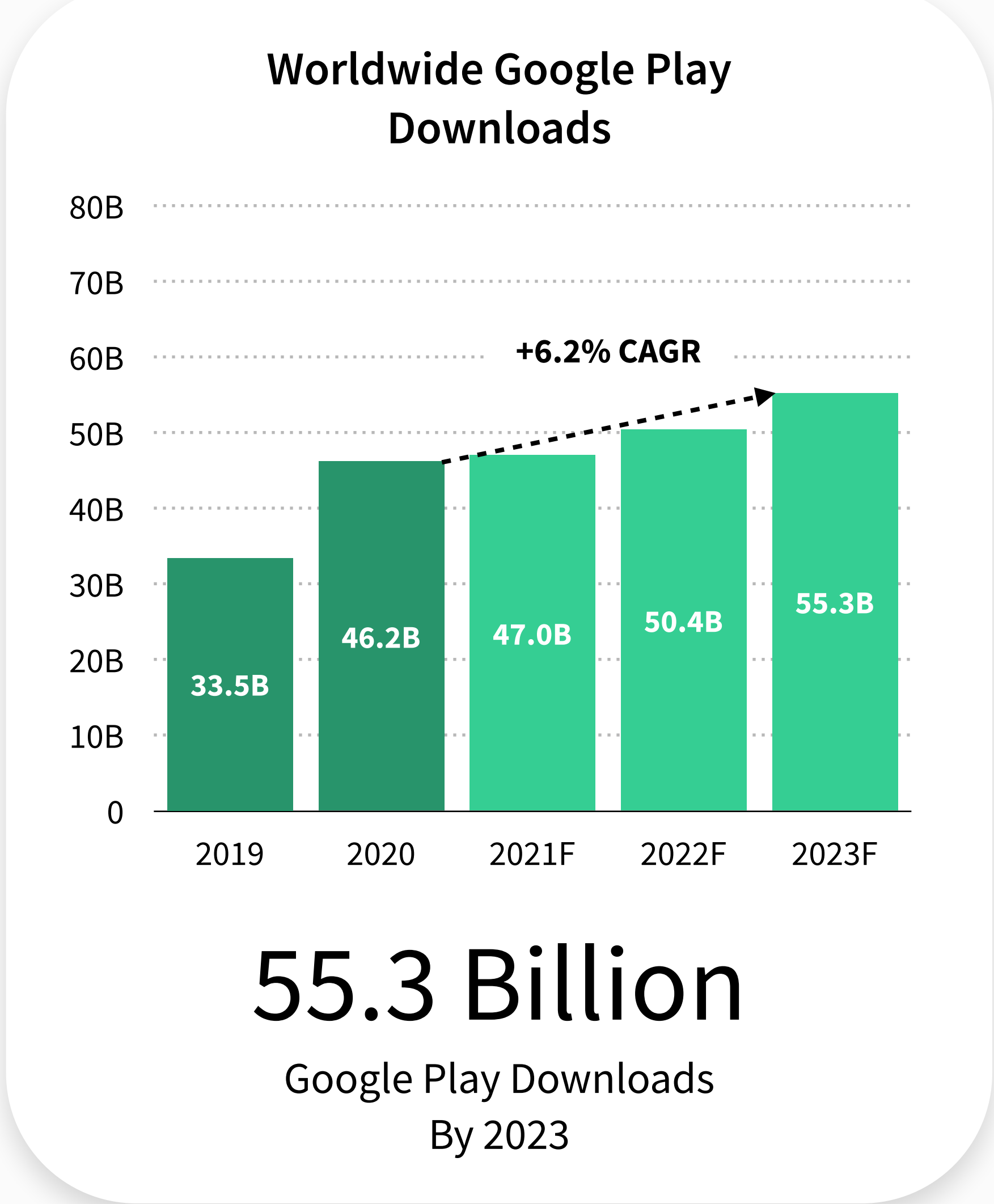
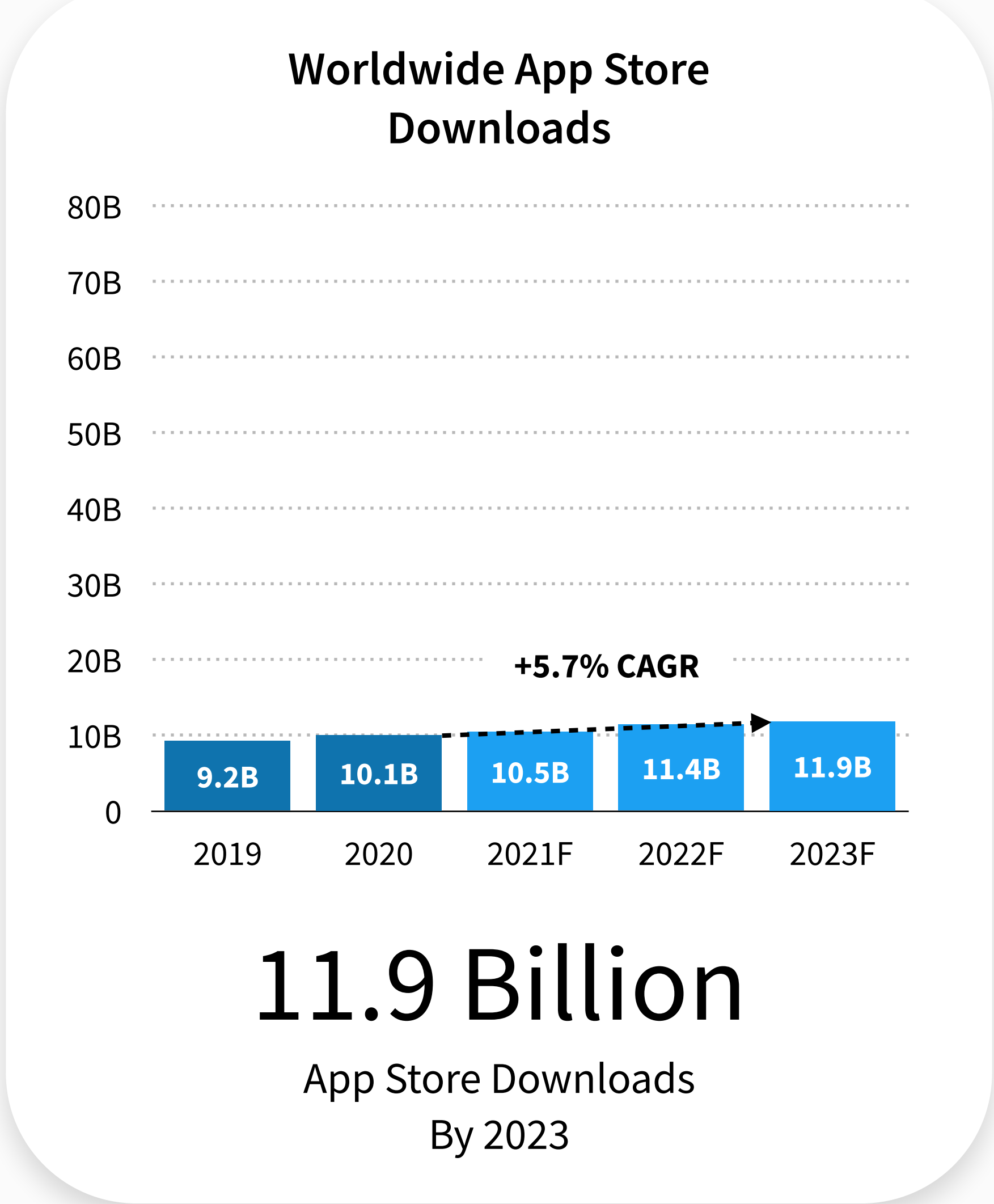
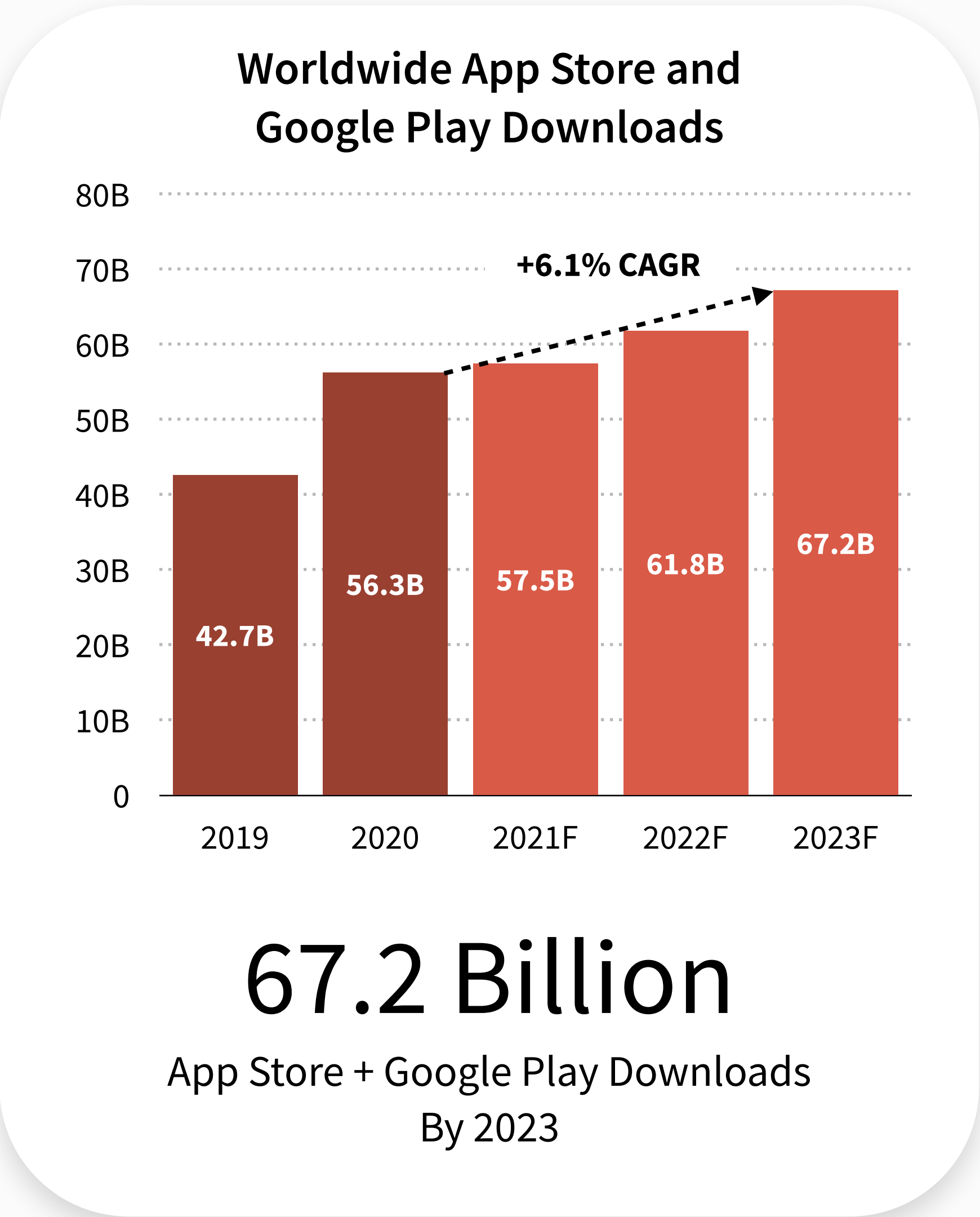
Three-year consumer spending forecast for the Games category on the App Store and Google Play



Note: Revenue figures are gross revenue (including the cut taken by Apple or Google).

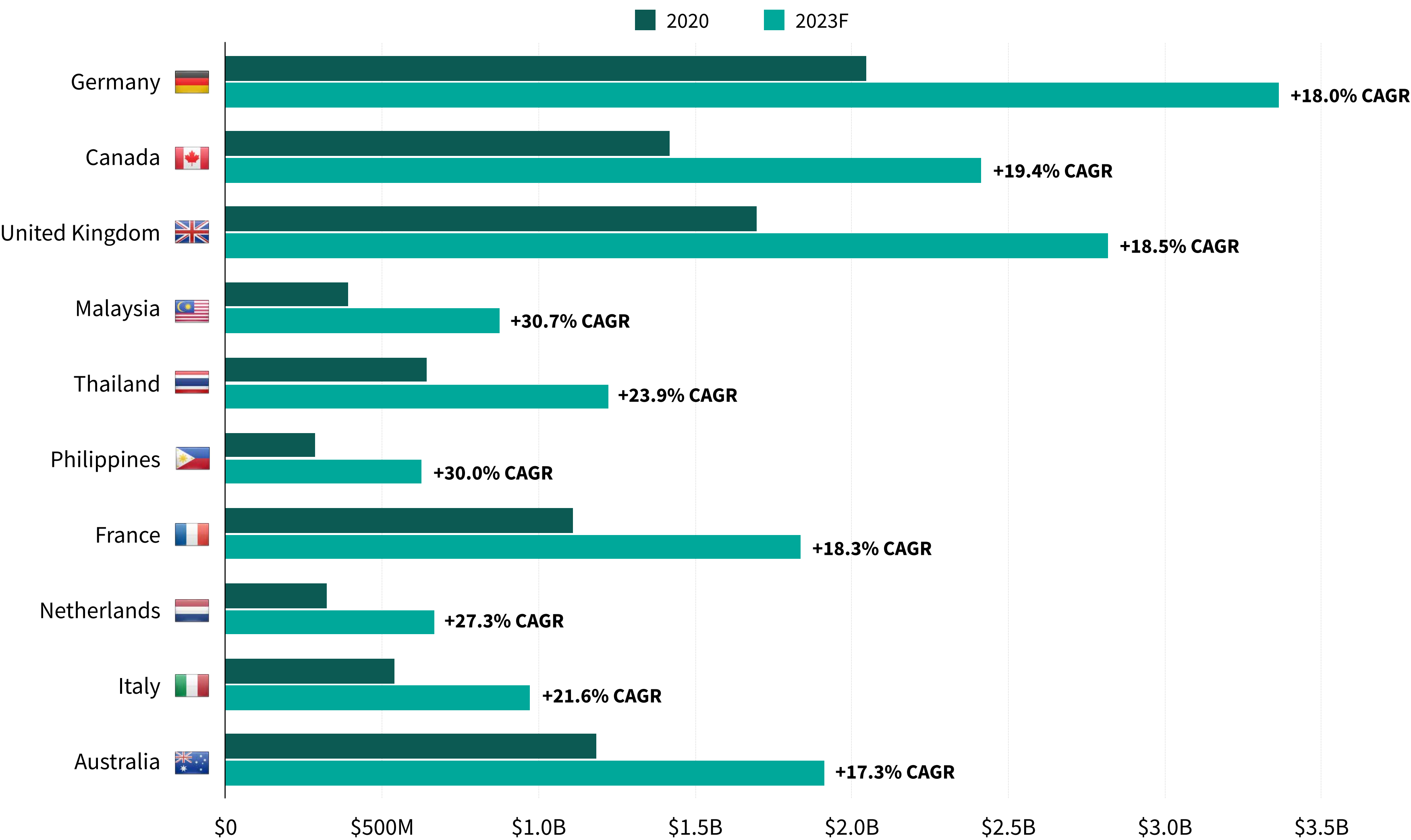
Mobile Game Installs are Projected to Rise Steadily to 67.2 Billion by 2023

Three-year download forecast for the Games category on the App Store and Google Play



European and Asian Markets Projected for Strong Growth

Top 10 countries by projected market share growth between 2020 - 2023



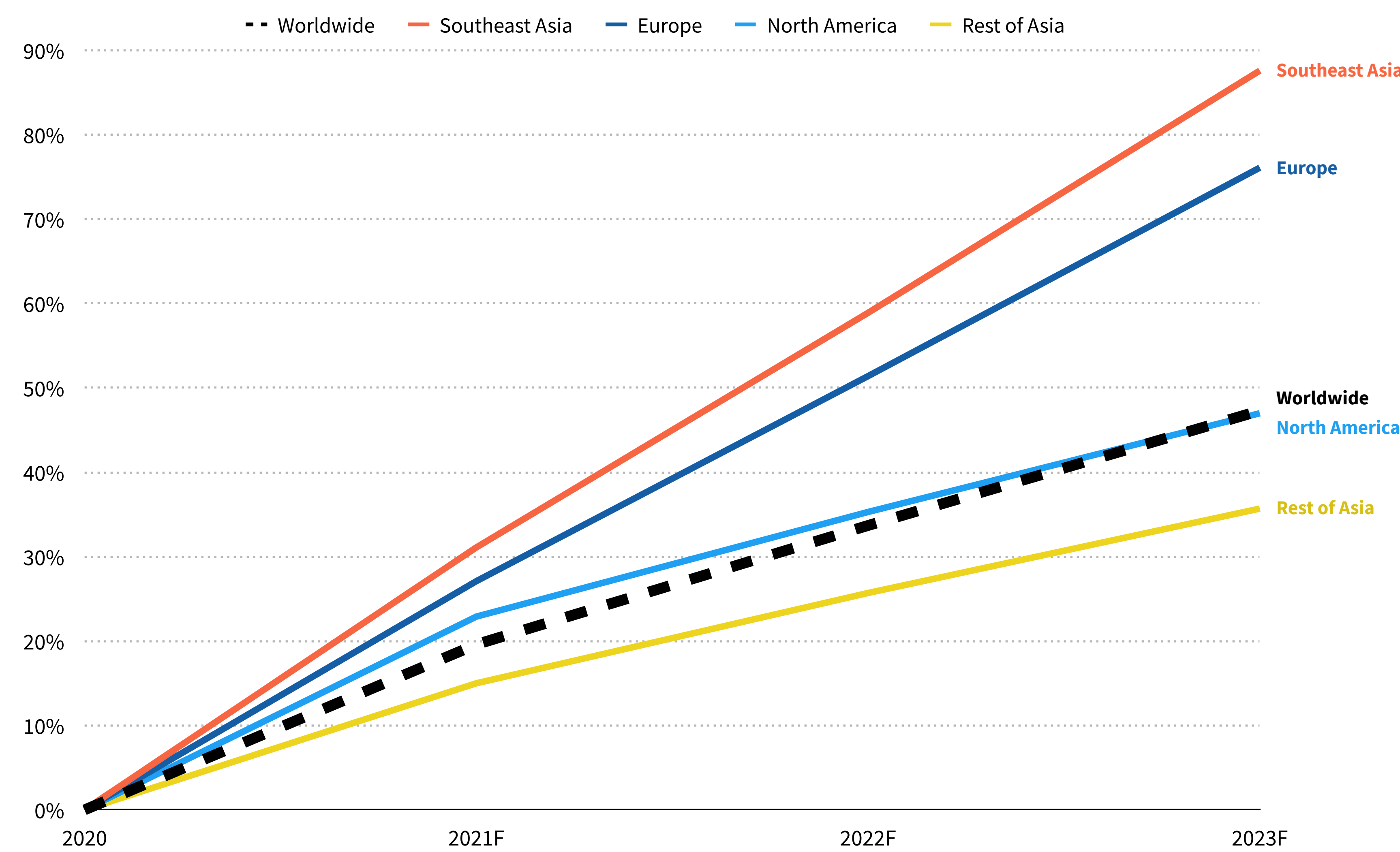
Germany is projected to gain the most market share for mobile game revenue by 2023 with annual growth of 18 percent. Four other European countries will join Germany among the top 10, including the U.K., France, Netherlands, and Italy.

Southeast Asia has three countries among the top 10 by market share growth. Malaysia and Philippines are projected for a compound annual growth rate (CAGR) of 30 percent or higher, while Thailand is projected for a CAGR of 24 percent.

Note:
Revenue figures are gross revenue (including the cut taken by Apple or Google).

Southeast Asia Game Revenue to Rise 90% by 2023

Revenue growth by region, App Store and Google Play

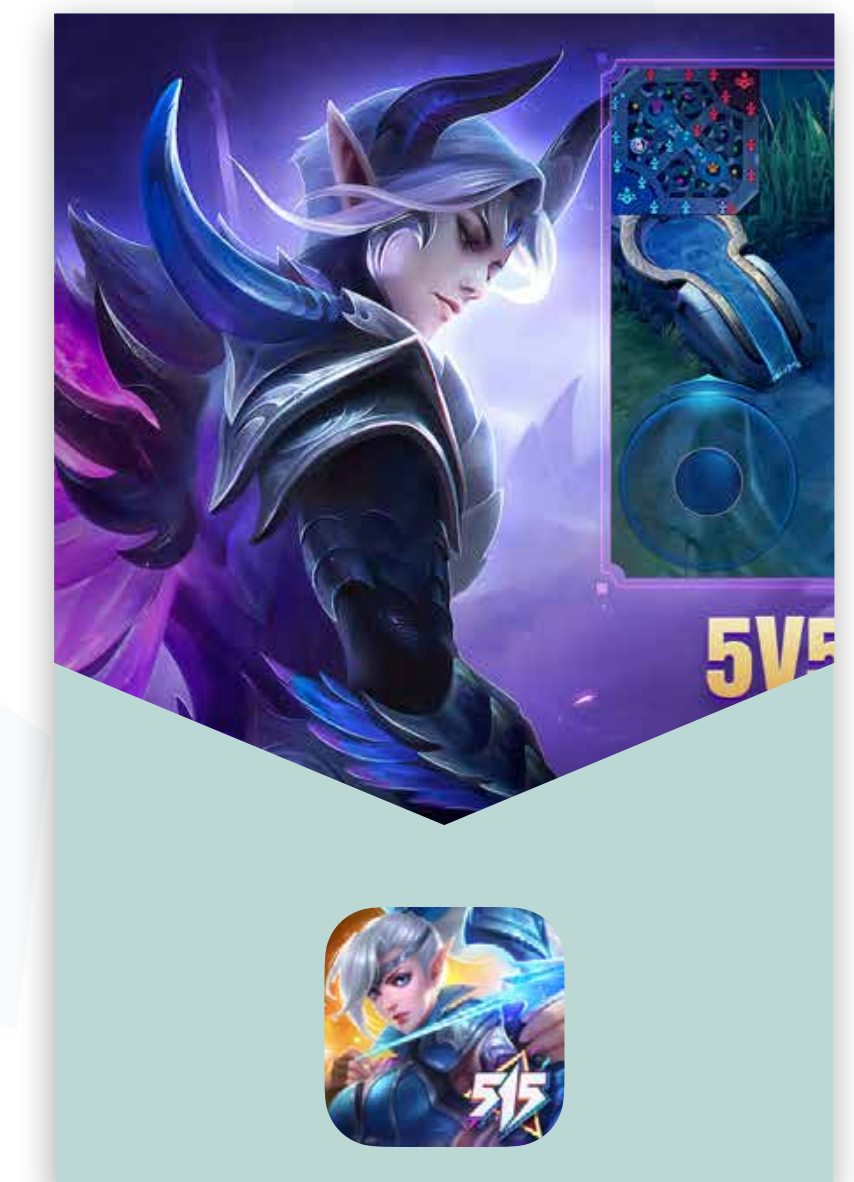
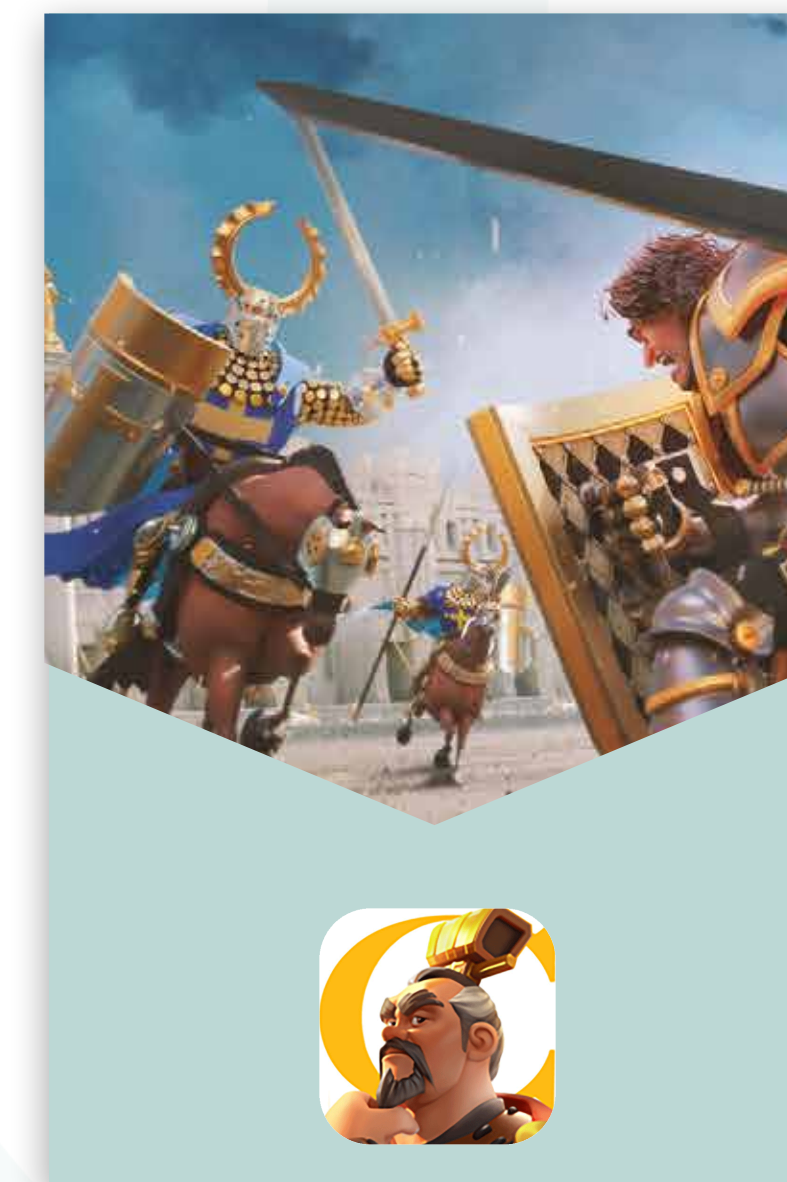
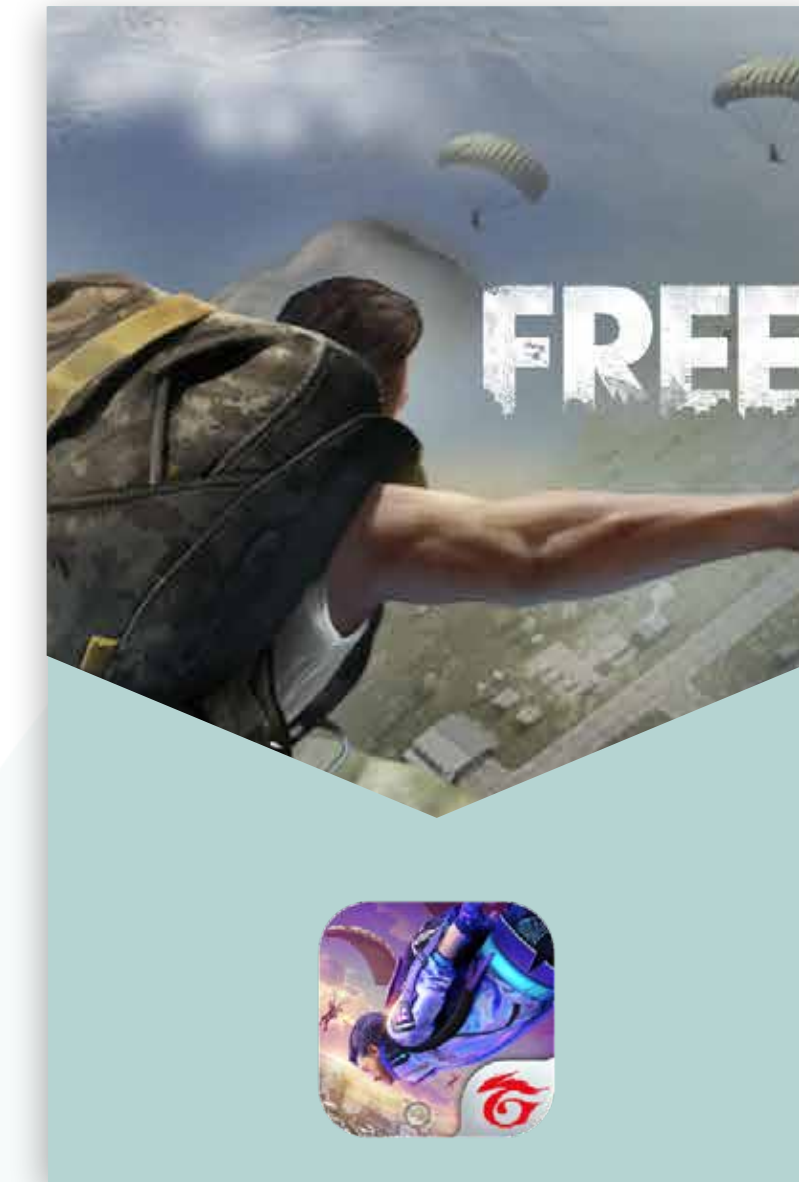
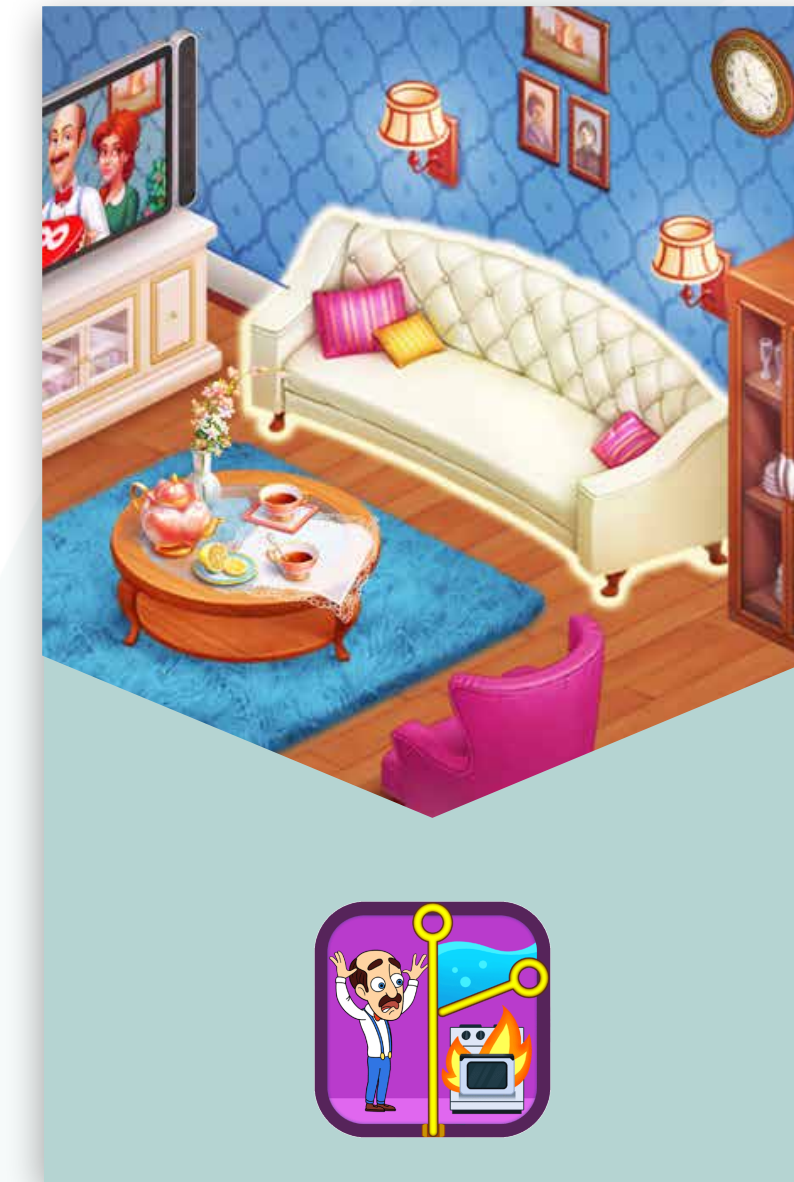


When looking at projected mobile game revenue growth by region, Southeast Asia and Europe are expected to far exceed the worldwide rate. Southeast Asia revenue will grow by 88 percent between 2020 and 2023, while Europe is projected for 76 percent growth over the same period.

North America revenue growth will be similar to the worldwide rate. Meanwhile, slower growth in mature gaming markets like China and Japan will result in a slightly lower growth rate in the rest of Asia (excluding Southeast Asia).

Key Takeaways: Market Forecast

1. Mobile game revenue will reach \$117 billion by 2023, a CAGR of 13.5 percent. The App Store will contribute \$67 billion with a 12.3 percent CAGR, while Google Play will reach \$50 billion with a 15.9 percent CAGR.
2. Mobile game downloads will surpass 67 billion by 2023, or an annual growth rate of 6.1 percent. More than 55 billion of these installs will be from Google Play, with the App Store contributing around 12 billion.
3. Europe and Southeast Asia are key markets for mobile game developers, as revenue growth in these regions are expected to easily outpace the worldwide rate over the next three years. Currently, Europe-based publishers have found the most success in Europe, while some top China-based publishers have emerged as key players in Southeast Asia.

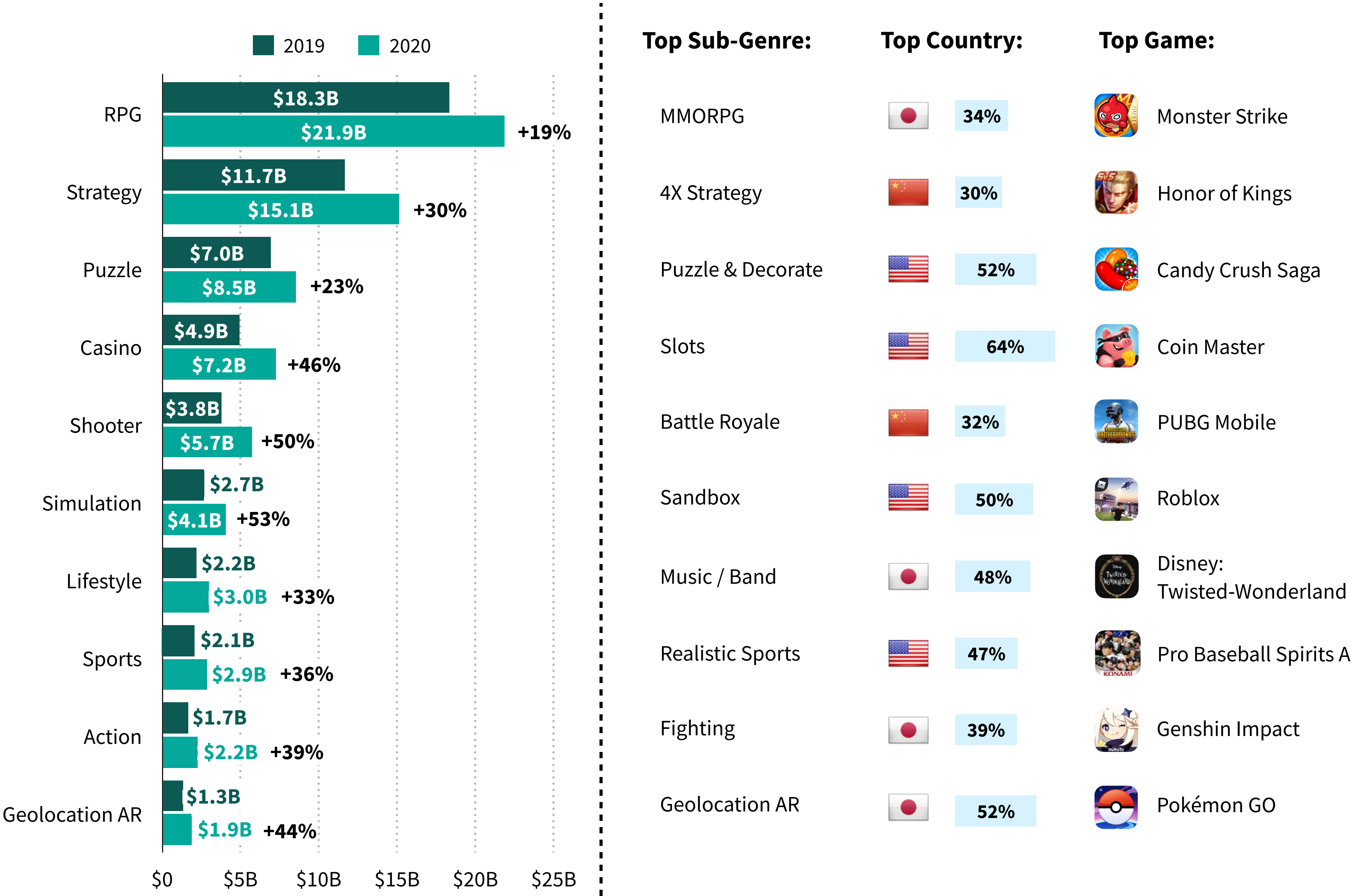


Game Genre Trends

Worldwide Trends by Mobile Game Genre

RPG Was the Top Game Genre by Revenue in 2020

Top 10 game genres by worldwide gross revenue, App Store and Google Play



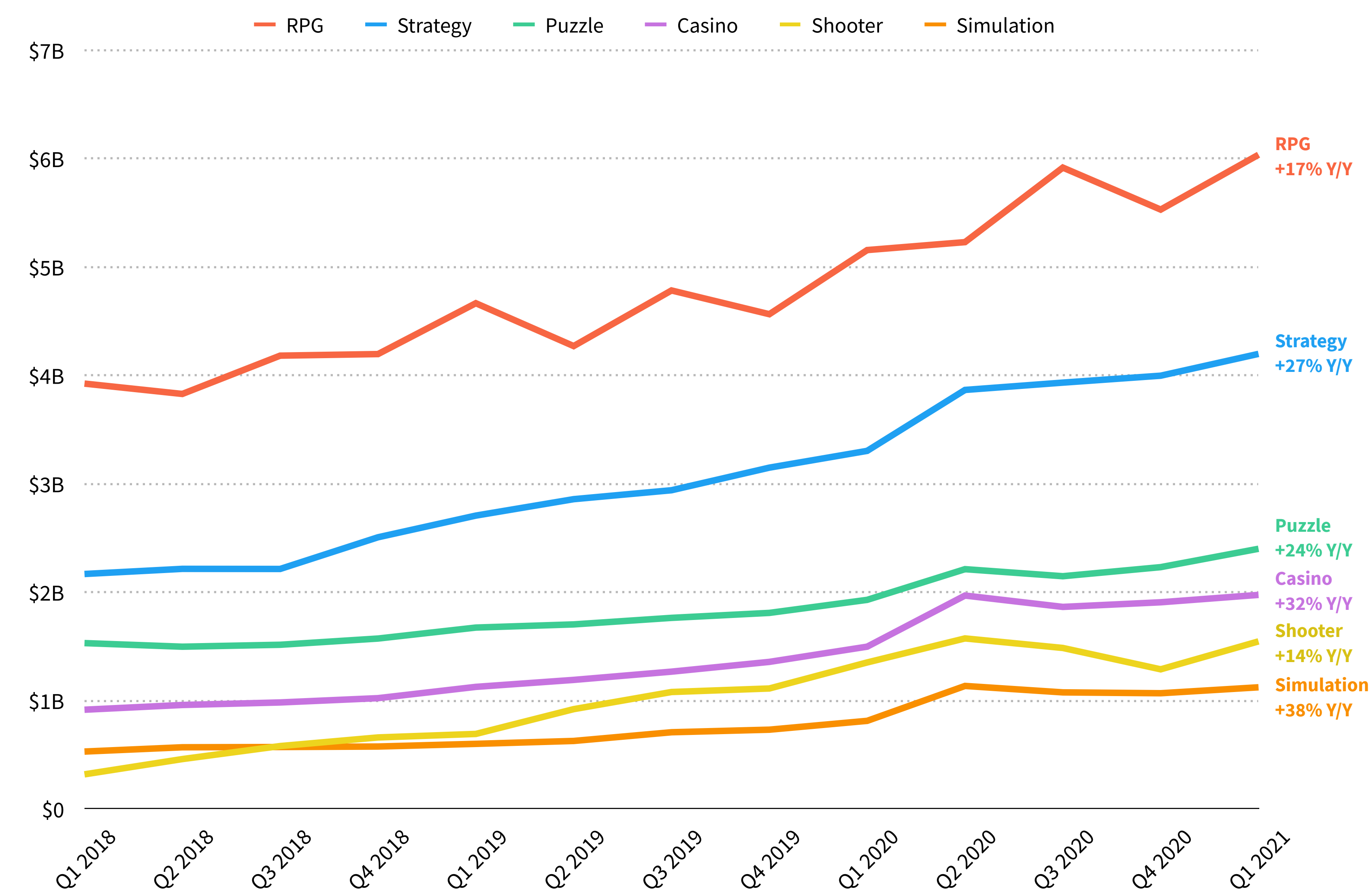
RPG led all genres by mobile game revenue in 2020, followed by Strategy and Puzzle. RPG revenue grew by \$3.6B year-over-year, while Strategy was close behind with growth of \$3.4B.

Among top genres, Simulation led the way by Y/Y growth at 53 percent, followed by Shooter with 50 percent and Casino at 46 percent. Each of these genres had one of the top five games by revenue in 2020, with PUBG Mobile (Shooter), Coin Master (Casino), and Roblox (Simulation).

Note:
Revenue figures are gross revenue (including the cut taken by Apple or Google).

Strategy's Growth Has Kept Pace with RPG Since 2018

Worldwide revenue by game genre, App Store and Google Play



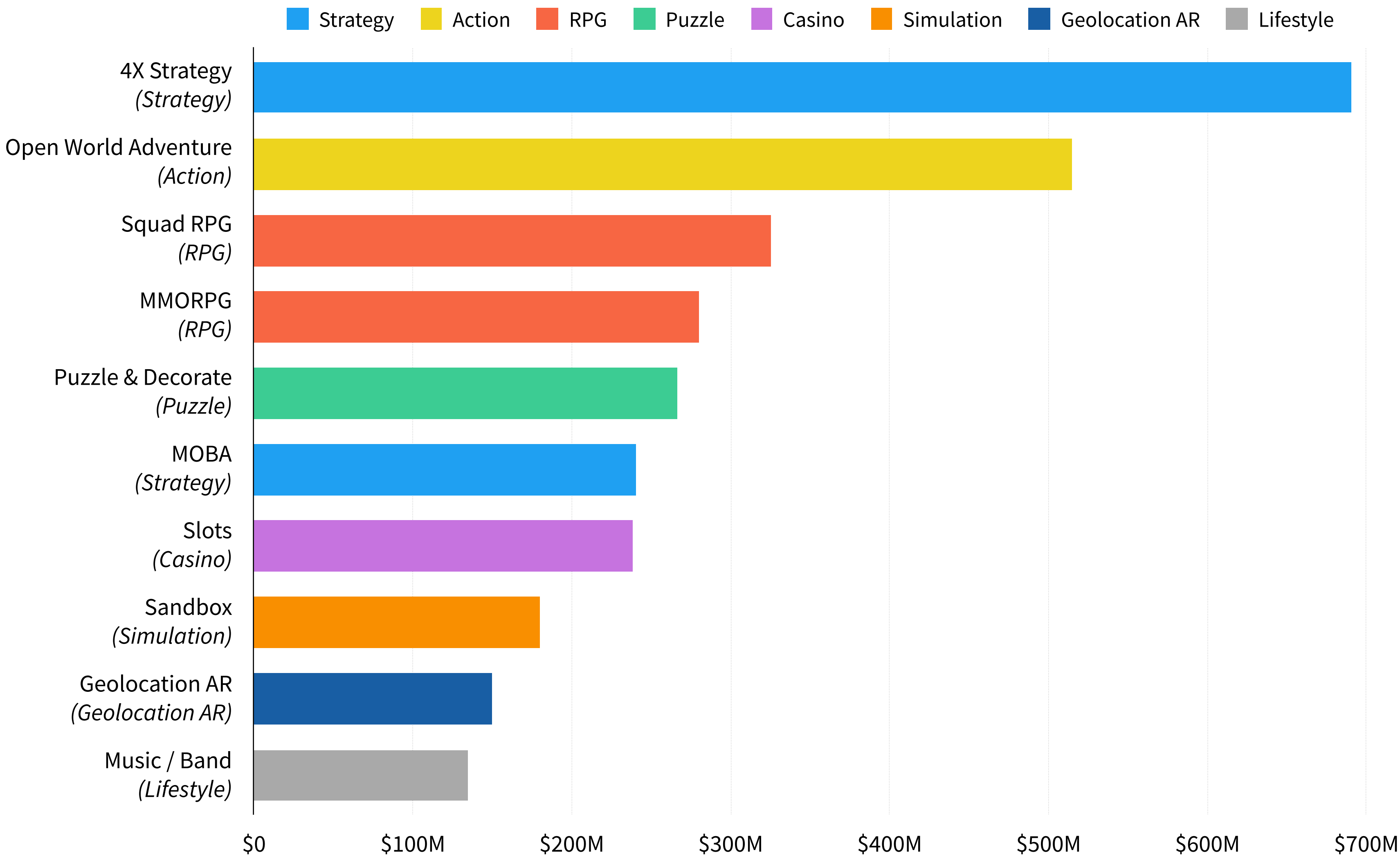
Strategy has been able to stay within \$1.4 billion of RPG gross revenue each quarter since 2018. Strategy has a CAGR of 25 percent since Q1 2018 vs. RPG's CAGR of 15 percent.

Casino and Simulation benefited from a few hit titles gaining traction during the pandemic. Coin Master contributed to much of Casino's revenue gains in 2020, while Roblox was responsible for a large portion of Simulation's growth.

Note:
Revenue figures are gross revenue (including the cut taken by Apple or Google).

4X Strategy is the Fastest Growing Sub-Genre

Top 10 game sub-genres by year-over-year revenue growth in Q1 2021



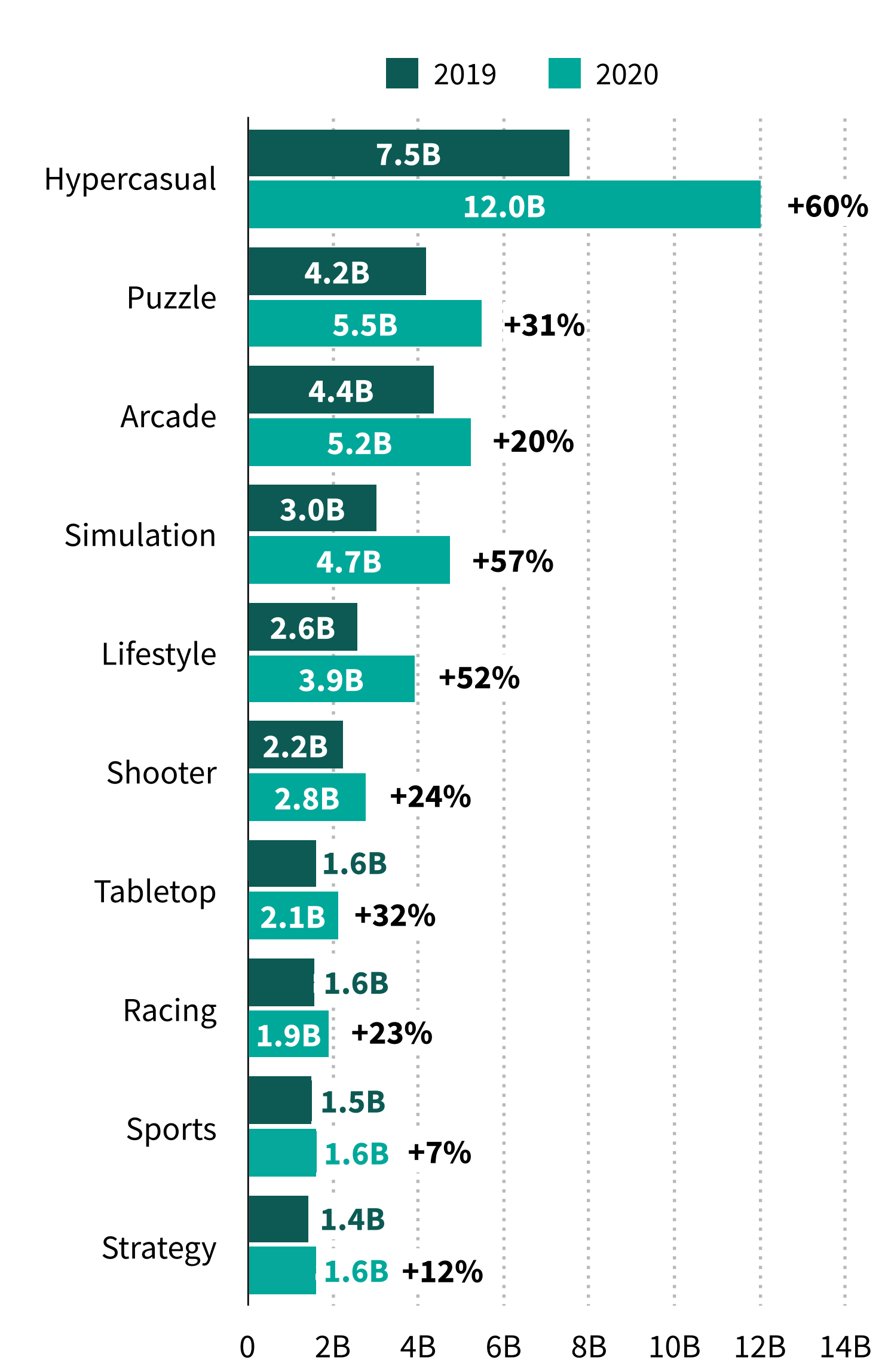
4X Strategy is the fastest growing sub-genre by revenue, followed by Open World Adventure. Six different 4X Strategy games earned at least \$100 million in Q1 2021, while Open World Adventure was boosted by the hugely successful launch of Genshin Impact.

Top growing sub-genres were spread across many different genres. Sub-genres from eight different genres were among the top 10 by growth, with Strategy and RPG as the only two genres with multiple sub-genres.

Note:
Revenue figures are gross revenue (including the cut taken by Apple or Google).

The Assent of Hypercasual Continued in 2020

Top 10 game genres by worldwide downloads, App Store and Google Play



Top Sub-Genre:

Top Country:

Top Game:

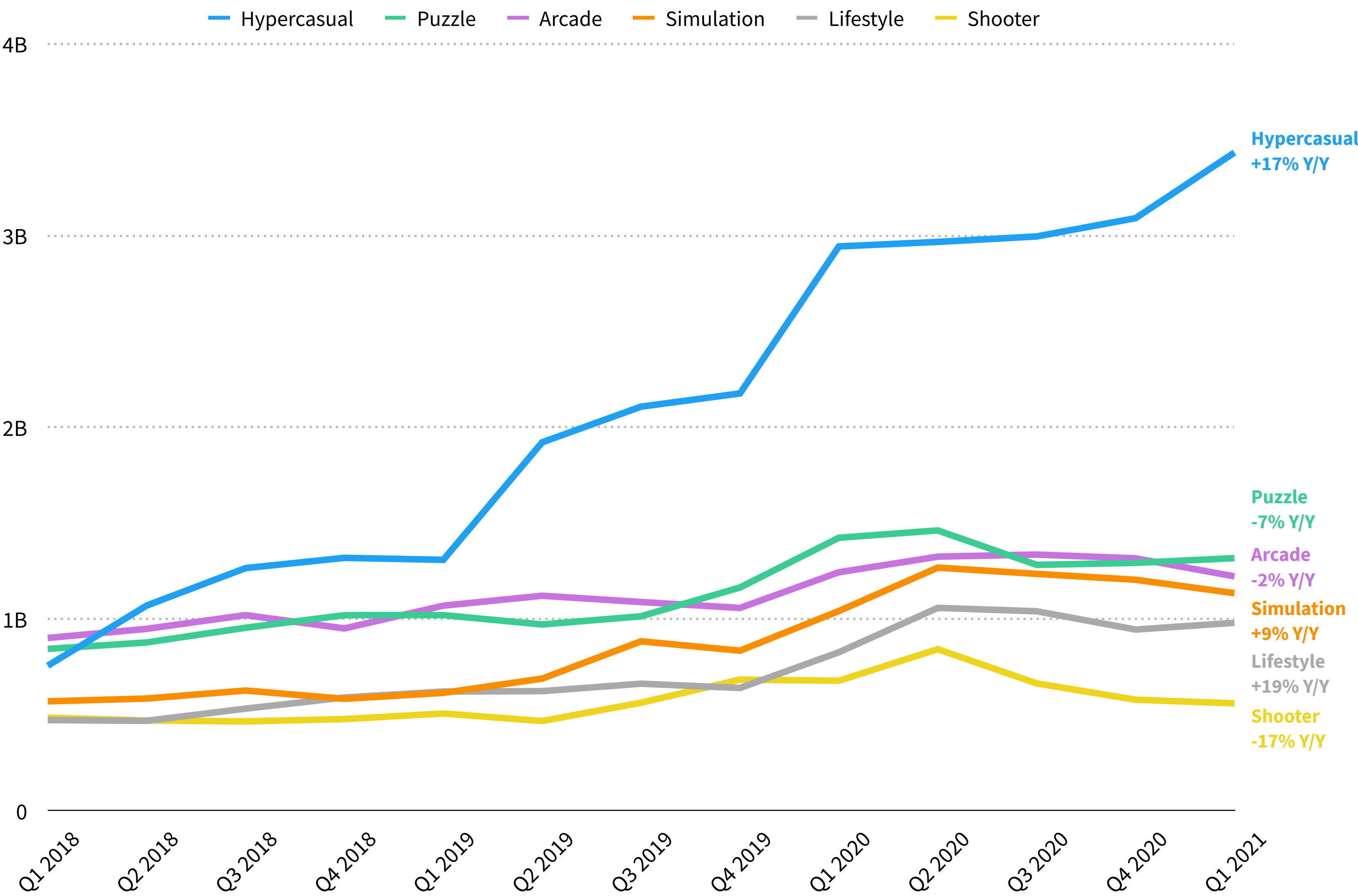
Puzzle		14%		Tiles Hop 3D
Other Puzzle		16%		Gardenscapes
Platformer / Runner		20%		Among Us
Driving / Flight Simulator		18%		Roblox
Lifestyle Simulator		15%		My Talking Tom 2
FPS / 3PS		26%		Garena Free Fire
Board		31%		Ludo King
Realistic Racing		28%		Hill Climb Racing
Realistic Sports		18%		8 Ball Pool
4X Strategy		9%		Brawl Stars

Hypercasual install growth continued in 2020, rising 60 percent year-over-year. Most of the growth occurred early in 2020 as downloads rose 35 percent between Q4 2019 and Q1 2020.

Other top growing genres included Simulation and Lifestyle with 57 percent and 52 percent Y/Y growth, respectively. India was the top country by downloads for both of these genres, followed by Brazil and the U.S.

Hypercasual Has Seen Staggering Growth Since 2018

Worldwide download growth by game genre, App Store and Google Play

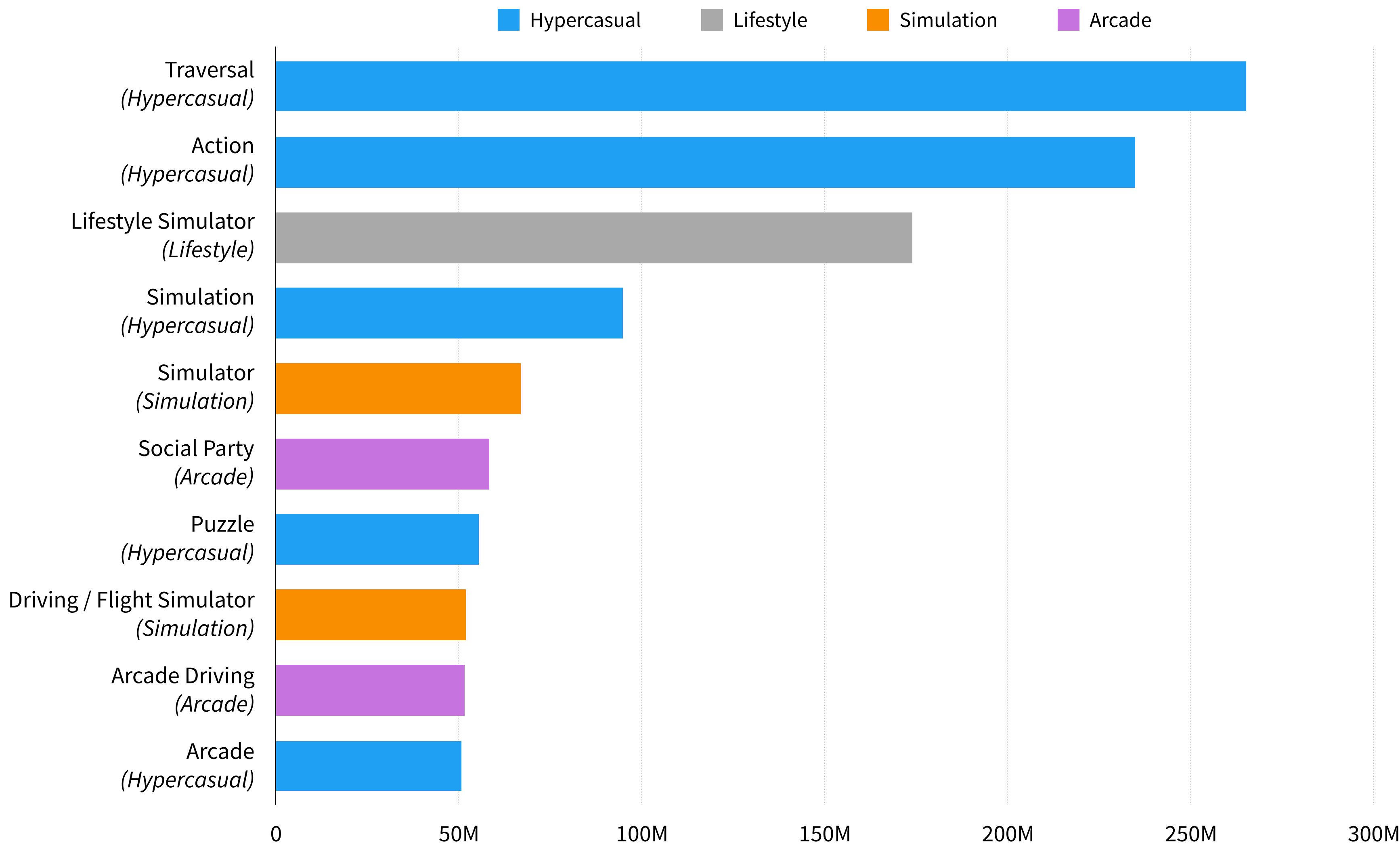


Hypercasual installs have skyrocketed, climbing from 757 million in Q1 2018 to more than 3.4 billion in Q1 2021. The genre was responsible for 31 percent of downloads in Q1 2021; no other genre had more than 12 percent.

Other genres like Puzzle, Arcade, and Shooter saw downloads dip compared to the highs seen during the start of the pandemic. Most genres still saw solid growth compared to 2019 totals.

Hypercasual Sub-Genres Drove Adoption Growth

Top 10 game sub-genres by year-over-year download growth in Q1 2021

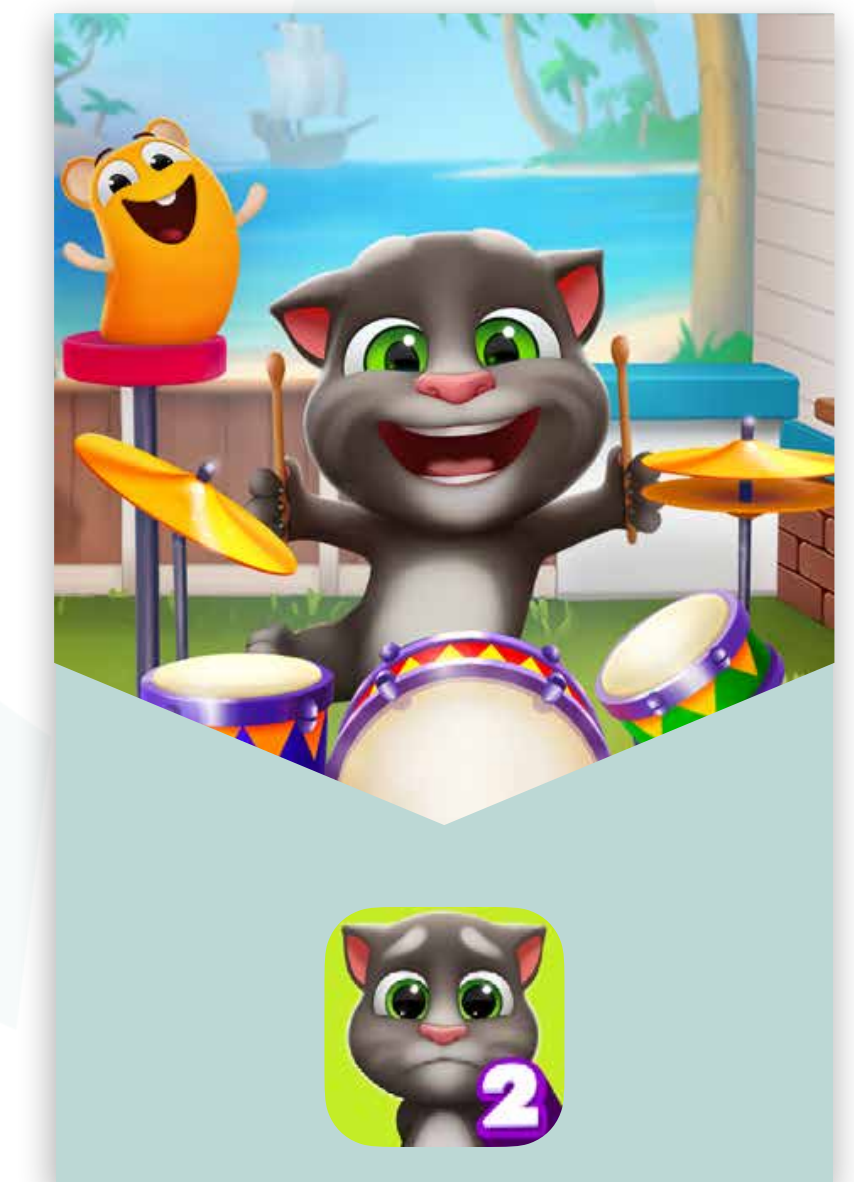
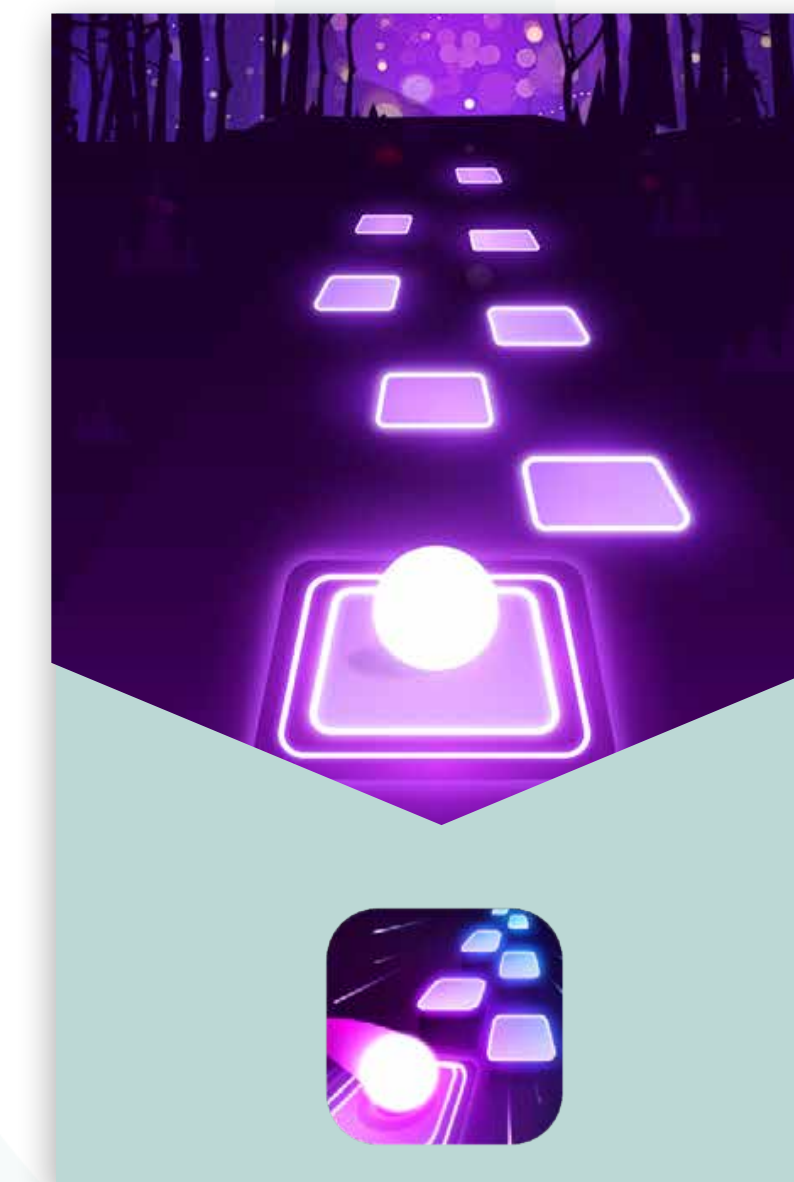
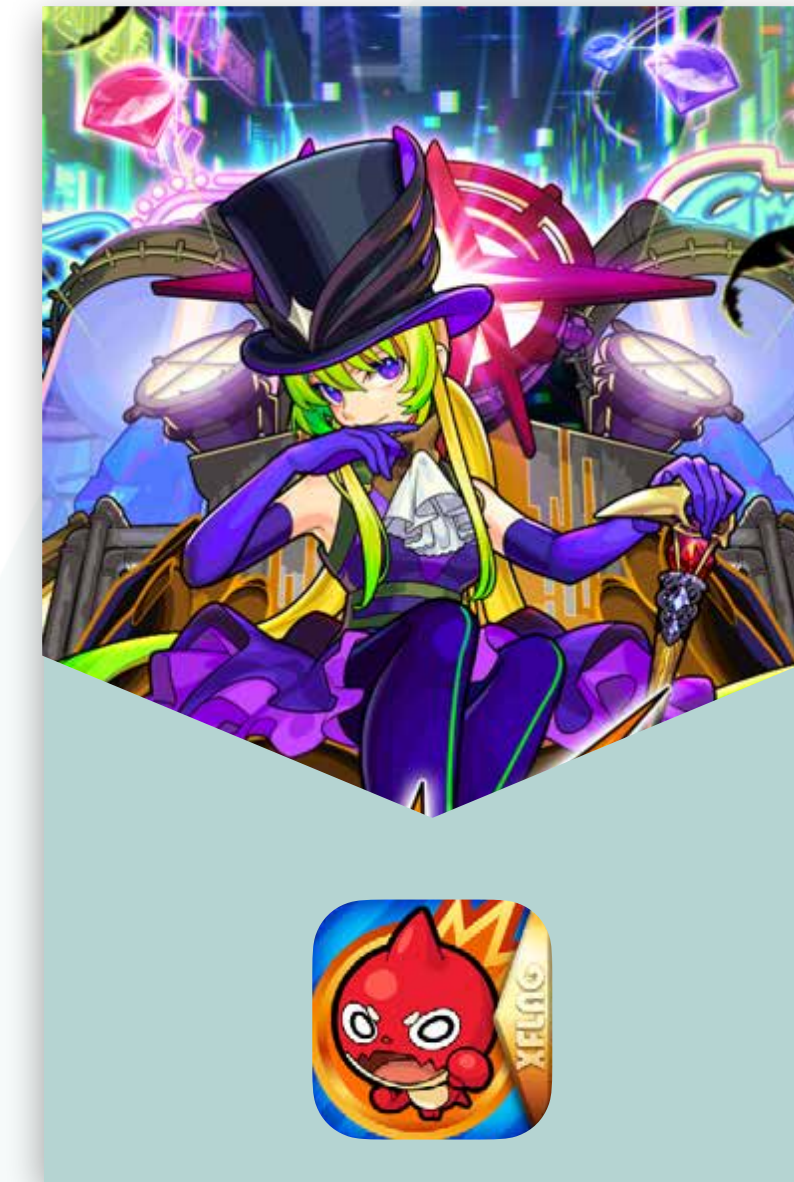


Five of the top 10 fastest growing sub-genres by Y/Y growth in Q1 2021 were in the Hypercasual genre, including the top two. Simulation and Arcade each had two sub-genres represented.

The top game in Q1 2021 was Join Clash 3D from Supersonic Studios with more than 81 million downloads, representing the Hypercasual - Traversal sub-genre. Among Us drove nearly all of the growth for the Arcade - Social Party sub-genre.

Key Takeaways: Game Genre Trends

1. RPG and Strategy were the top two genres by revenue in 2020 at \$21.9 billion and \$15.1 billion, respectively. No other genre had more than \$10 billion in revenue that year.
2. Revenue growth was strong across top genres in 2020, with Simulation (53 percent year-over-year growth), Shooter (50 percent), and Casino (46 percent) leading the way. Eight different genres had one of the top 10 sub-genres by revenue growth in Q1 2021.
3. When it comes to mobile games installs, hypercasual has seen staggering growth in recent years. While hypercasual game download growth slowed after a large spike in Q1 2020, downloads still reached a record high 3.4 billion in Q1 2021, up 17 percent from a year prior. More than 30 percent of game installs in Q1 2021 were from hypercasual games.



Monetization Trends

Trends in Mobile Game Monetization Strategies

Monetization Trends:

Mobile Monetization Strategies

Early on, mobile games primarily monetized by offering a fixed price for full access. Monetization strategies have evolved since, with many top mobile games utilizing different in-app purchase (IAP) and advertising strategies to boost revenue far beyond the levels reached by premium (paid) games at the launch of the app stores. This section explores current strategies used by the leaders in mobile gaming.

1

**Free Games
With IAPs**

PUBG Mobile



Roblox



Pokémon GO



2

**Free Games
With Ads**

Tie Dye



Tiles Hop



Join Clash 3D



3

Paid Games

Minecraft



Heads Up!

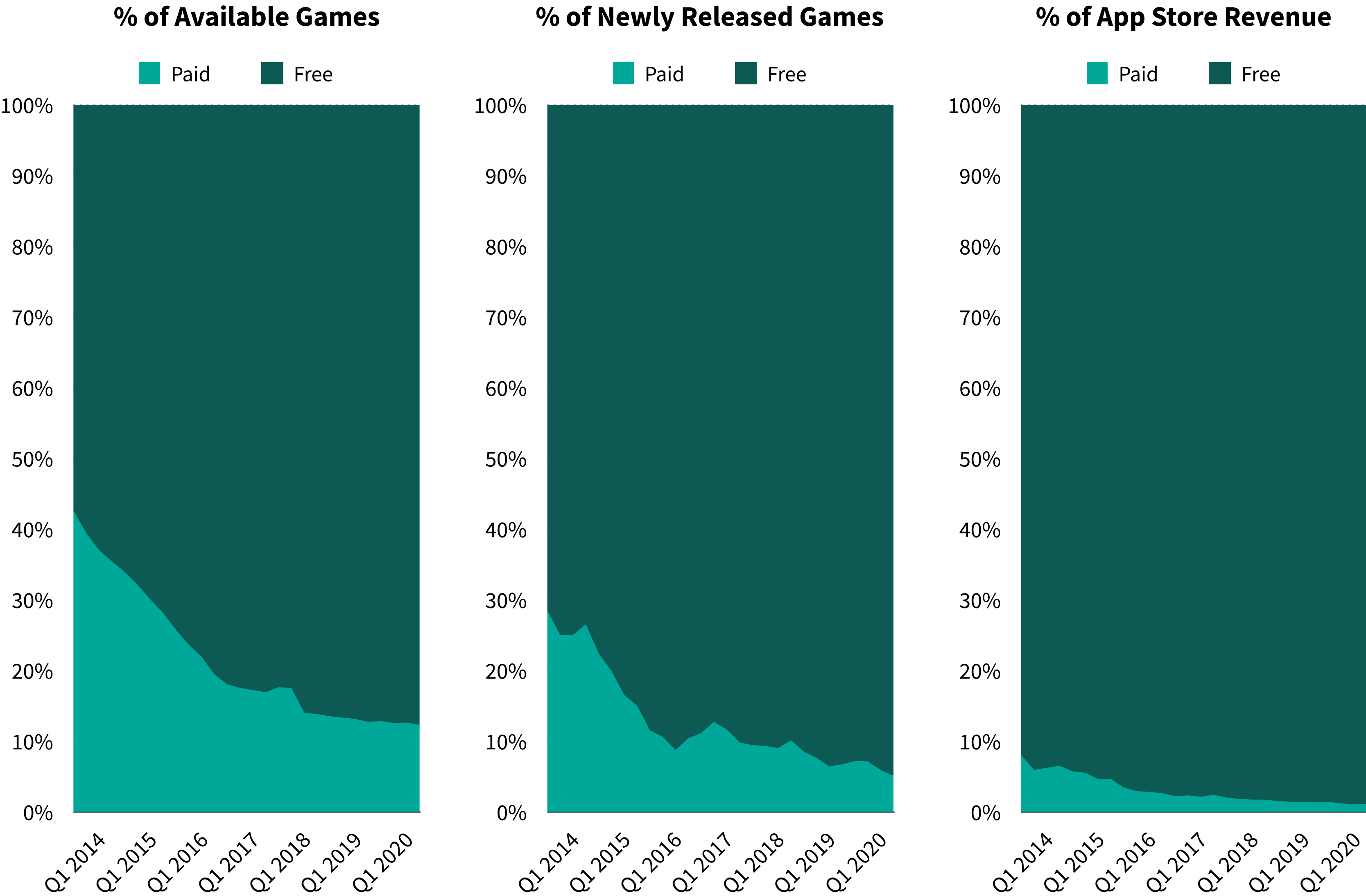


Bloons TD 6



Freemium Has Edged Out Premium in Mobile Gaming

Paid game shares relative to free games on the App Store

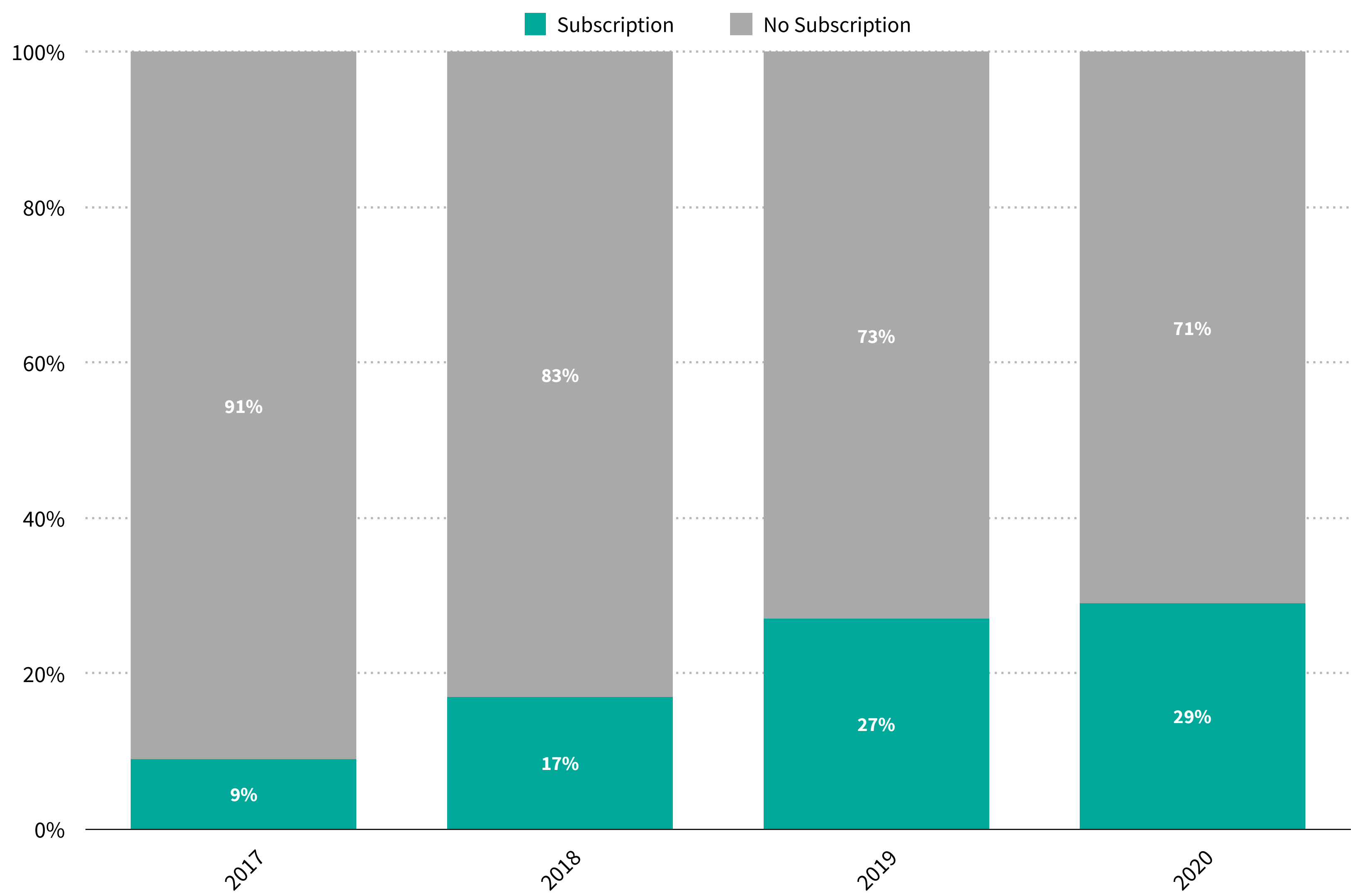


Since the start of 2014, paid (or premium) games have continued to lose market share to free games. By Q4 2020, only five percent of newly released games were paid games, and the share of paid games on the App Store had fallen to 12 percent (down from 43 percent in Q1 2014).

Freemium games have held an edge in monetizing since 2014, explaining the transition away from the premium model. Paid games only accounted for eight percent of mobile game revenue on the App Store at the start of 2014. By Q4 2020 this share had fallen to one percent.

Subscription Model is On the Rise

Share of the top 100 games by U.S. App Store revenue in 2020 that have a subscription



By 2020, 29 percent of the top games by U.S. revenue on the App Store had a subscription. This number has climbed steadily, up from just 9 percent in 2017.

More games have begun to adopt the subscription model, including some top titles like Roblox, Clash of Clans, and PUBG Mobile. While the subscription is no the top in-app purchase for most of these games, it does provide a boost to the freemium model when implemented correctly.

Most Mobile Games Don't Rely on Subscriptions

Top in-app purchases (IAPs) for games with subscriptions



Roblox
Roblox

Name	Price	Rank
Premium 80 Robux	\$0.99	1
800 Robux Premium	\$9.99	2
400 Robux Premium	\$4.99	3
80 ROBUX	\$0.99	4
880 Robux Subscribed	\$9.99	5
Premium 88 Subscribed	\$0.99	6
800 ROBUX	\$9.99	7
Roblox Premium 450	\$4.99	8
400 ROBUX	\$4.99	9
440 Robux Subscribed	\$4.99	10



Clash of Clans
Supercell

Name	Price	Rank
Pile of Gems	\$4.99	1
Bag of Gems	\$9.99	2
Sack of Gems	\$19.99	3
Gold Pass	\$4.99	4
Pocketful of Gems	\$0.99	5
Resource Pack	\$0.99	6
Special Offer	\$2.99	7
Box of Gems	\$49.99	8
Chest of Gems	\$99.99	9
Special Offer	\$9.99	10



PUBG Mobile
Tencent

Name	Price	Rank
60 Unknown Cash	\$0.99	1
600 Unknown Cash	\$9.99	2
300 Unknown Cash	\$4.99	3
1500 Unknown Cash	\$24.99	4
6000 Unknown Cash	\$99.99	5
3000 Unknown Cash	\$49.99	6
PUBGM Prime(1 month)	\$0.99	7
PUBGM PrimePlus(1 month)	\$9.99	8
180 Unknown Cash	\$2.99	9
ig.yiyuan1	\$0.99	10



Rise of Kingdoms
Lilith Games

Name	Price	Rank
Daily Limited	\$2.99	1
Daily Limited	\$0.99	2
Daily Limited	\$1.99	3
Legendary Commander Training	\$4.99	4
Hero Pack	\$4.99	5
Gem Monthly Subscription	\$9.99	6
War Pack	\$4.99	7
1050 Gem Pack	\$4.99	8
Research Pack	\$4.99	9
City Developing Pack	\$4.99	10

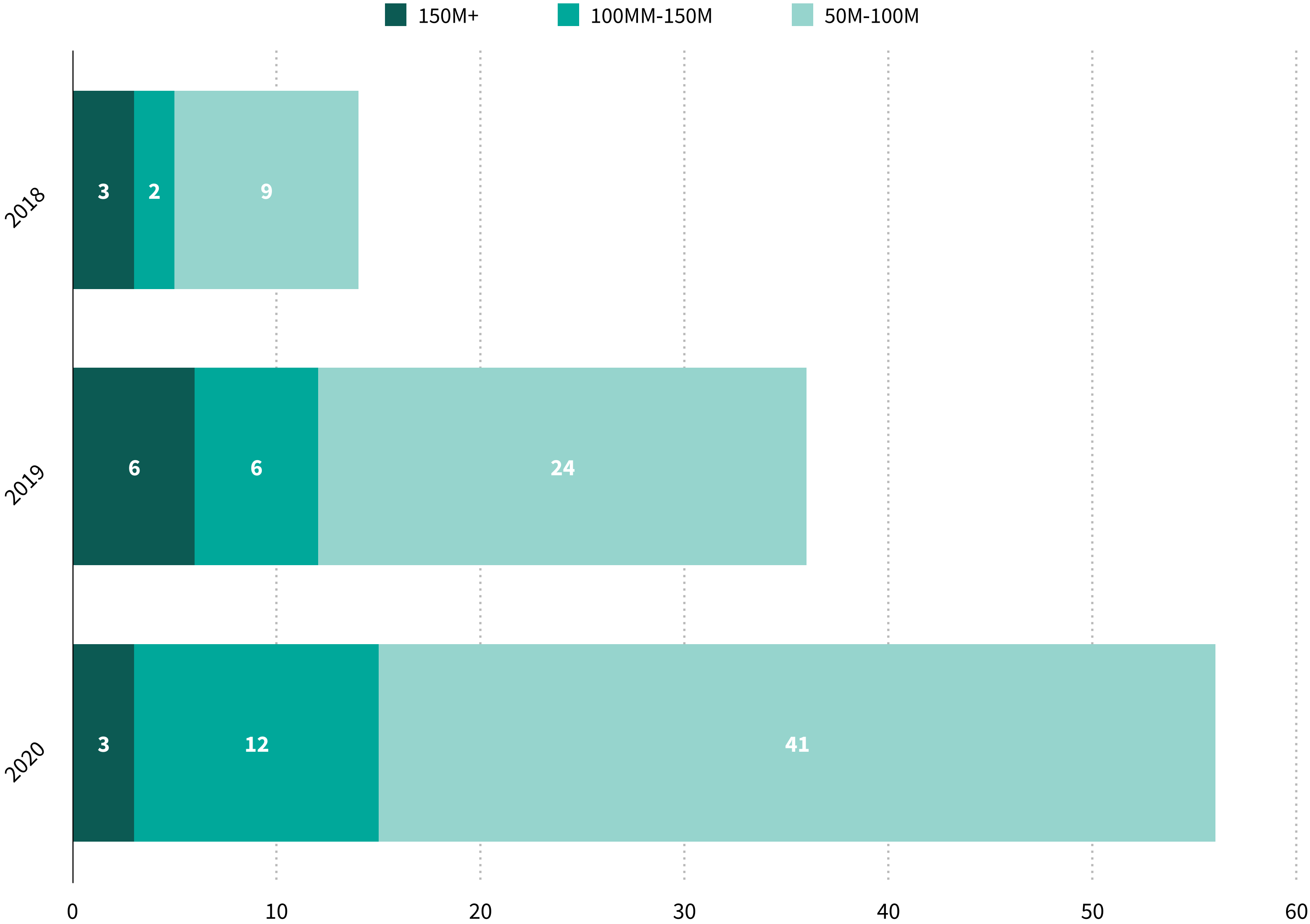
Even games that have successfully implemented the subscription model tend to get the bulk of their revenue from one-time purchases. Roblox is an exception, with monthly recurring subscription as its top three IAPs. Roblox also give subscribers a discount on additional Robux, the in game currency, as an extra incentive to subscribe.

Other top games like Clash of Clans, PUBG Mobile, and Rise of Kingdoms have their subscription among the top 10 IAPs but outside the top three spots. The subscriptions contribute to these games' success but are not the only monetization strategy they use.

Note:
In-app purchase rankings are as of the end of Q1 2021

More Than 50 Hypercasual Titles Crossed 50M Installs in 2020

Number of Hypercasual games reaching 50 million worldwide downloads by year

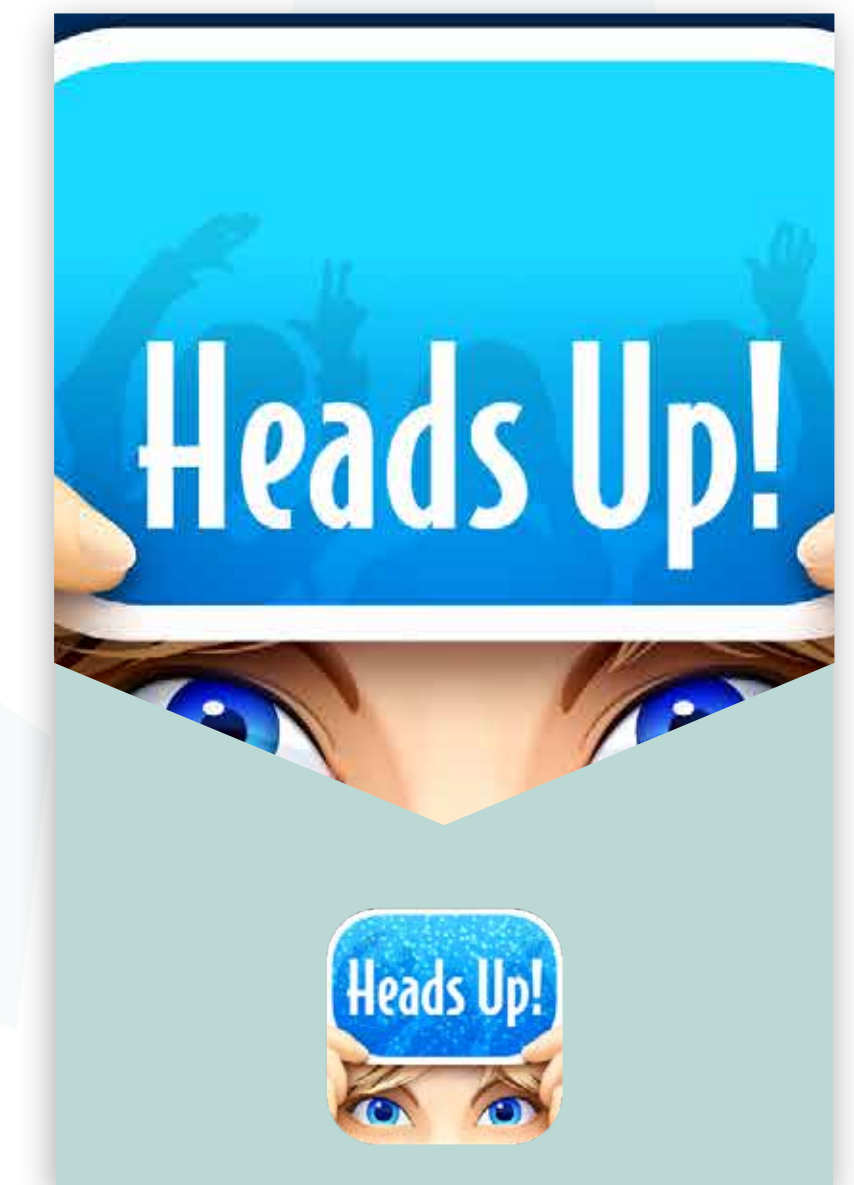
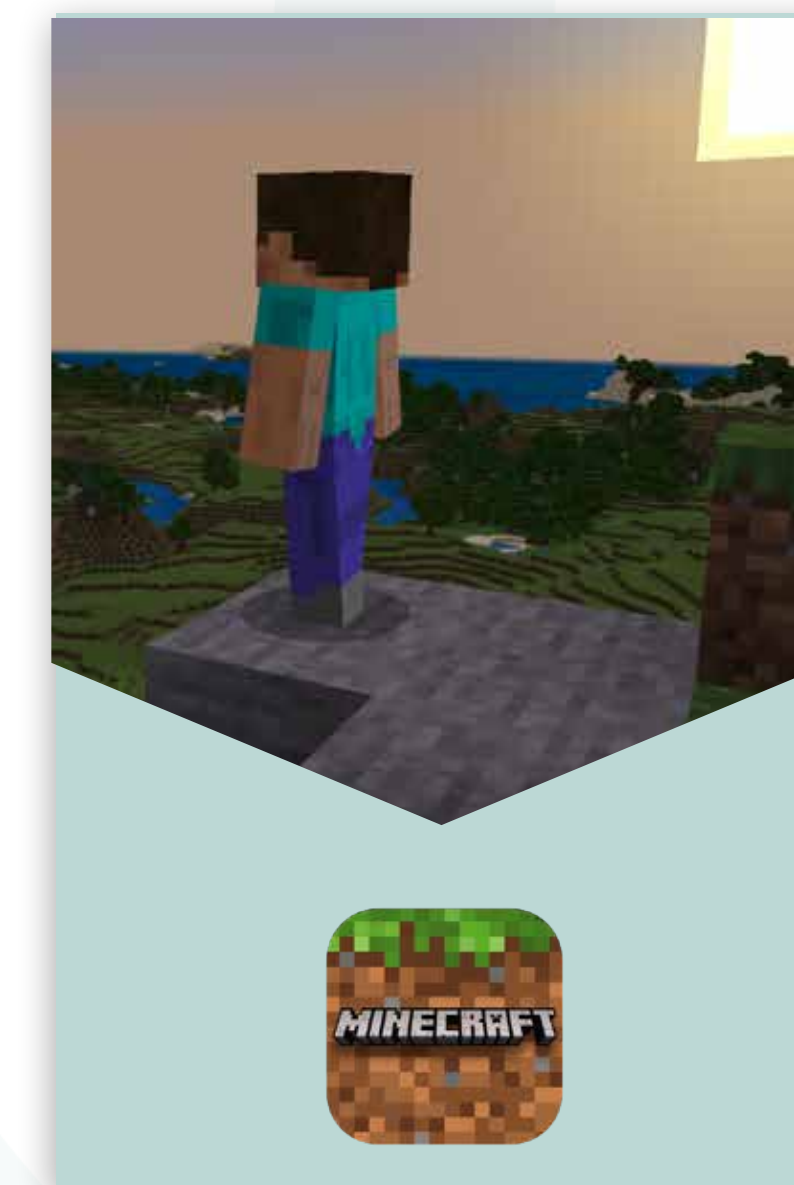
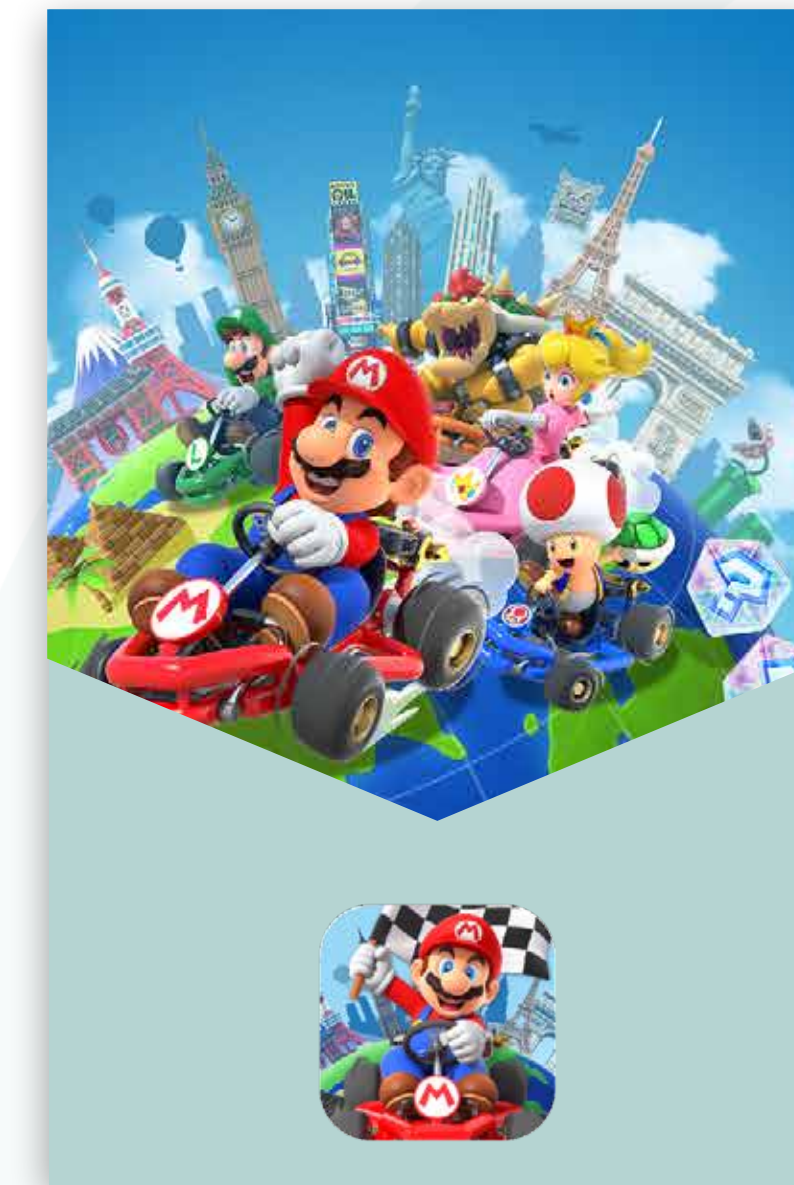


The rise of Hypercasual games illustrates how more and more developers are monetizing primarily through ads. 56 different Hypercasual games surpassed 50 million downloads in 2020, up from just 14 Hypercasual games that reached that threshold in 2018.

It is yet to be seen what the impact of IDFA will be on the Hypercasual games space, and mobile games advertising more broadly.

Key Takeaways: Monetization Trends

1. The vast majority of mobile games utilize the freemium model over the premium model. By Q4 2020, freemium games earned 99 percent of the revenue on the App Store compared to just one percent from premium games.
2. Some top games have found success using the subscription model, with examples including Roblox, PUBG Mobile, Clash of Clans, and Mario Kart Tour. While a subscription can help boost the revenue for games when it fits into the overall monetization strategy, most still rely on one time in-app purchases.
3. More and more games are monetizing through ads, with 56 different Hypercasual games adding at least 50 million users in 2020. The impact of IDFA on this strategy is yet to be seen.



Advertising Trends

Trends in Mobile Game Advertising

Advertising: Definitions

Ad Publisher

The app monetizing its platform by displaying ads to its users

Advertiser

Apps that are running mobile ad campaigns

Game Developer

Developer that publishes the advertising app



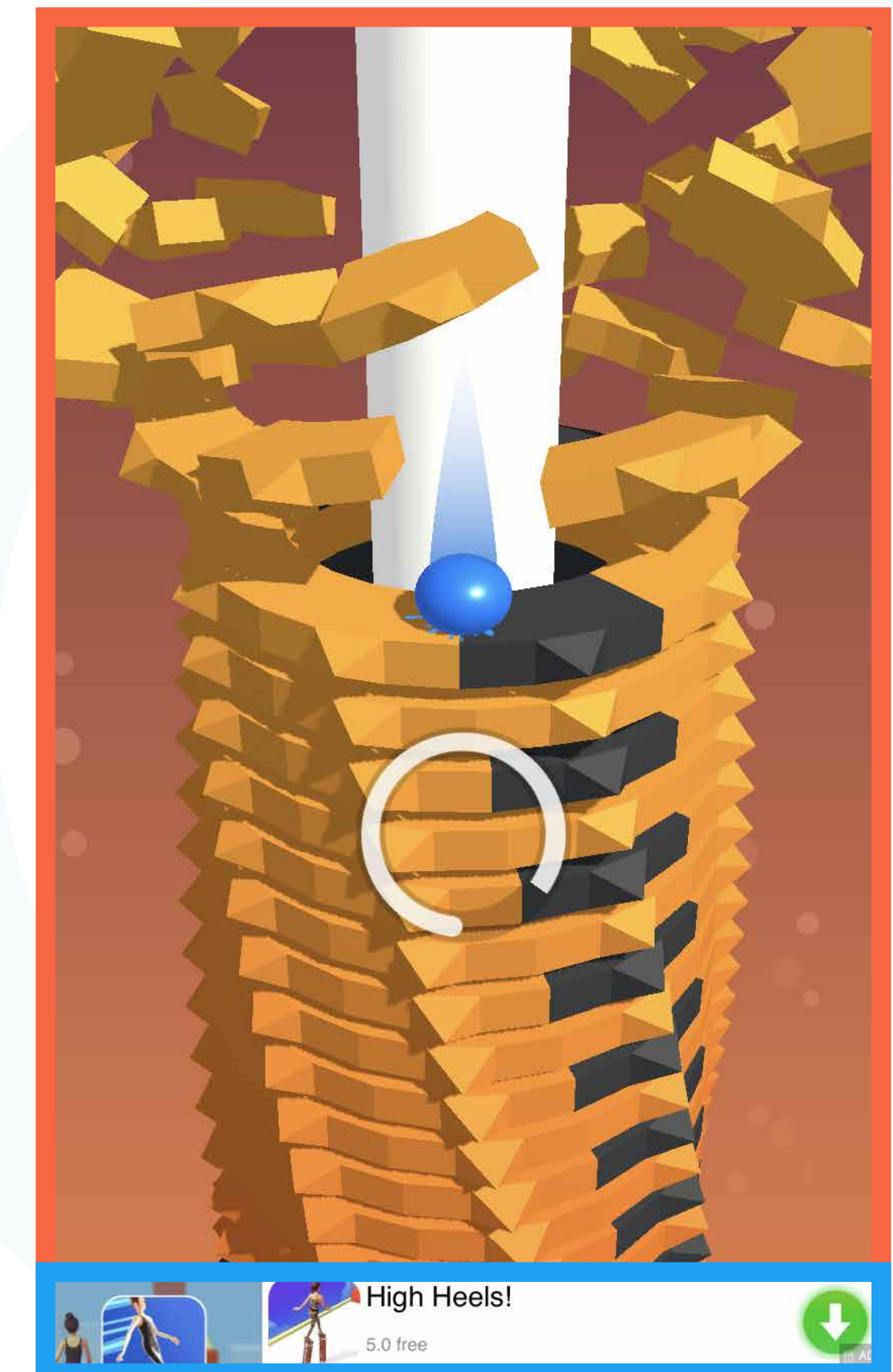
Shortcut Run
Voodoo



Snake.io
Kooapps



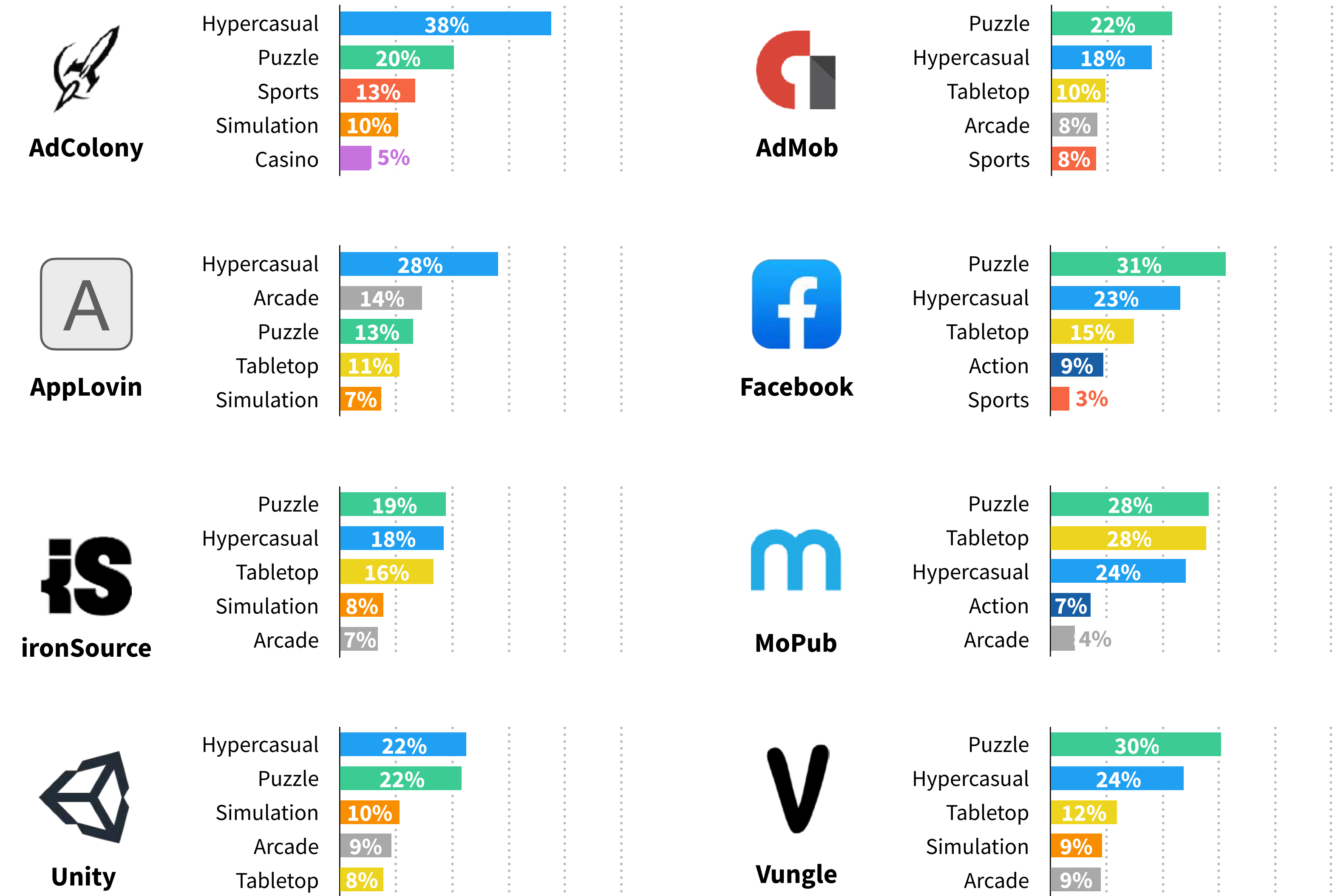
Stack Ball
Azur Interactive



High Heels
Zynga

Hypercasual and Puzzle Genres Rely on Ads the Most

2020 U.S. share of voice by game genre of the ad publishers on iOS



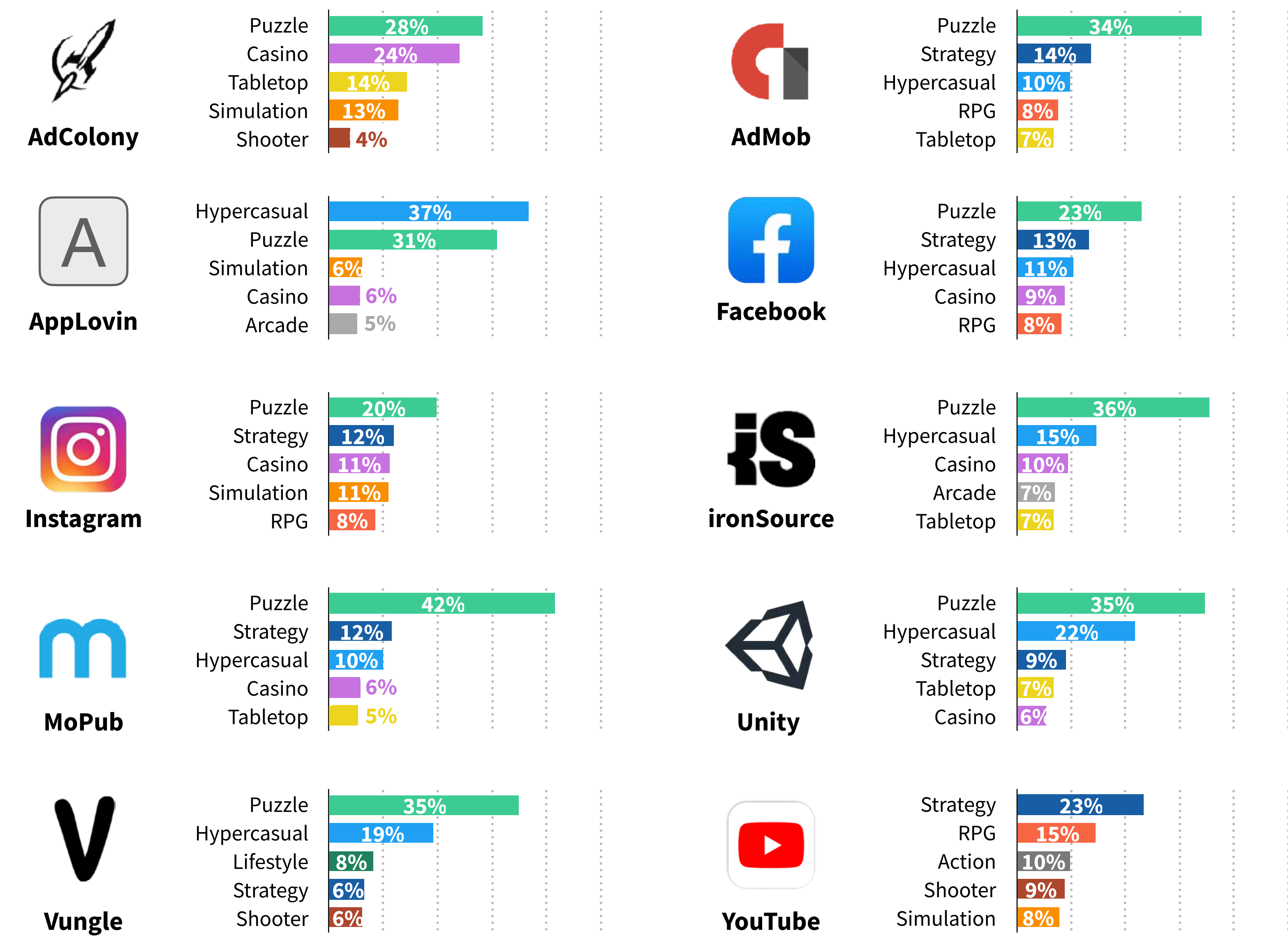
Puzzle was the top genre by ad publishing share of voice on five of the eight ad networks studies, and Hypercasual had the highest share of voice on the remaining three. Hypercasual games in particular monetize through showing ads, so it is not surprising that this genre publishes a high percentage of ads in mobile games.

Tabletop was the No. 2 genre by ad publishing share of voice on MoPub, and it ranked third on AdMob, Facebook, ironSource, and Vungle. Arcade also ranked among the top five on six of the eight networks.

Note:
Share of voice is calculated among game ad publishers only. Non-game ad publishers are excluded.

Puzzle Advertises the Most Across the Majority of Networks

2020 U.S. share of voice by game genre of the advertiser on iOS



When it comes to advertising, Puzzle games advertise frequently on mobile to drive adoption. Puzzle games were responsible for more than 30 percent of the mobile game advertising share of voice (SOV) on six of the 10 ad networks studied, including 42 percent on MoPub and 36 percent on ironSource.






Strategy and Hypercasual game genres also advertise considerably. Hypercasual was the top genre by SOV on AppLovin and it ranked among the top three genres on six other networks. Meanwhile, Strategy was the top genre on YouTube and was the No. 2 genre on four other ad networks.

Note: Share of voice is calculated among game advertisers only. Non-game advertisers are excluded.






AppLovin and Activision Blizzard Are Among the Top Ad Publishing Developers

Top ad publishing developers by U.S. advertising share of voice on iOS






AdColony

- 1  Ninja Kiwi
- 2  Miniclip
- 3  Take-Two Interactive
- 4  Ubisoft
- 5  Sybo Games






AdMob

- 1  Electronic Arts
- 2  AppLovin
- 3  Activision Blizzard
- 4  zplay
- 5  InnerSloth






AppLovin

- 1  AppLovin
- 2  RobTop Games
- 3  Ubisoft
- 4  Playgendary
- 5  Elokence






Facebook

- 1  Activision Blizzard
- 2  Habby
- 3  Zynga
- 4  Voodoo
- 5  Miniclip






MoPub

- 1  X-Flow
- 2  Zynga
- 3  Habby
- 4  Voodoo
- 5  Easybrain






Unity

- 1  AppLovin
- 2  Voodoo
- 3  Zynga
- 4  InnerSloth
- 5  Stillfront Group

Vungle

- 1  X-Flow
- 2  Easybrain
- 3  Voodoo
- 4  Zynga
- 5  AppLovin






ironSource

- 1  Activision Blizzard
- 2  Miniclip
- 3  Jam City
- 4  MobilityWare
- 5  Take-Two Interactive






Zynga Was a Top Advertiser Following Its Rollic Games Acquisition

Top game developers by U.S. advertising share of voice on iOS






AdColony

- 1  Playrix
- 2  Stillfront Group
- 3  Nordcurrent
- 4  Big Run Studios
- 5  Tether Studios






AdMob

- 1  Playrix
- 2  Zynga
- 3  Easybrain
- 4  AppLovin
- 5  Activision Blizzard






AppLovin

- 1  AppLovin
- 2  Voodoo
- 3  Easybrain
- 4  SayGames
- 5  Good Job Games






Facebook

- 1  Zynga
- 2  AppLovin
- 3  Voodoo
- 4  Habby
- 5  Topwar Studio




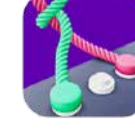

MoPub

- 1  Playrix
- 2  Zynga
- 3  Activision Blizzard
- 4  AppLovin
- 5  Easybrain






Unity

- 1  Zynga
- 2  Playrix
- 3  Easybrain
- 4  Playgendary
- 5  BitMango

Vungle

- 1  Playrix
- 2  Activision Blizzard
- 3  Voodoo
- 4  Zynga
- 5  Crazy Labs

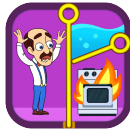




YouTube

- 1  Activision Blizzard
- 2  miHoYo
- 3  Lilith Games
- 4  Aristocrat Technologies
- 5  Moon Active






Homescapes Saw Steady Advertising Across Many Networks

Top apps by U.S. advertising share of voice on iOS






AdColony

- 1  Homescapes
Playrix
- 2  BitLife
Candywriter
- 3  Gardenscapes
Playrix
- 4  Blackout Bingo
Big Run Studios
- 5  Marvel Contest of Champions
Kabam






AdMob

- 1  Homescapes
Playrix
- 2  Toon Blast
Peak Games
- 3  Double Down
Double Down
- 4  Happy Color
X-Flow
- 5  Gardenscapes
Playrix






AppLovin

- 1  Wordscapes
PeopleFun
- 2  Brain Test
Unico Studios
- 3  Ink Inc
Lion Studios
- 4  Save the Girl
Lion Studios
- 5  Cooking Fever
NordCurrent






Facebook

- 1  Archero
Habby
- 2  Top War
Topwar Studio
- 3  Toon Blast
Peak Games
- 4  CSR 2
NaturalMotion
- 5  Wordscapes
PeopleFun






MoPub

- 1  Homescapes
Playrix
- 2  Fishdom
Playrix
- 3  Call of Duty: Mobile
Activision Blizzard
- 4  Township
Playrix
- 5  Gardenscapes
Playrix






Unity

- 1  Homescapes
Playrix
- 2  Gardenscapes
Playrix
- 3  Happy Color
X-Flow
- 4  Word Collect
Super Lucky Games
- 5  Pokémon GO
Niantic

Vungle

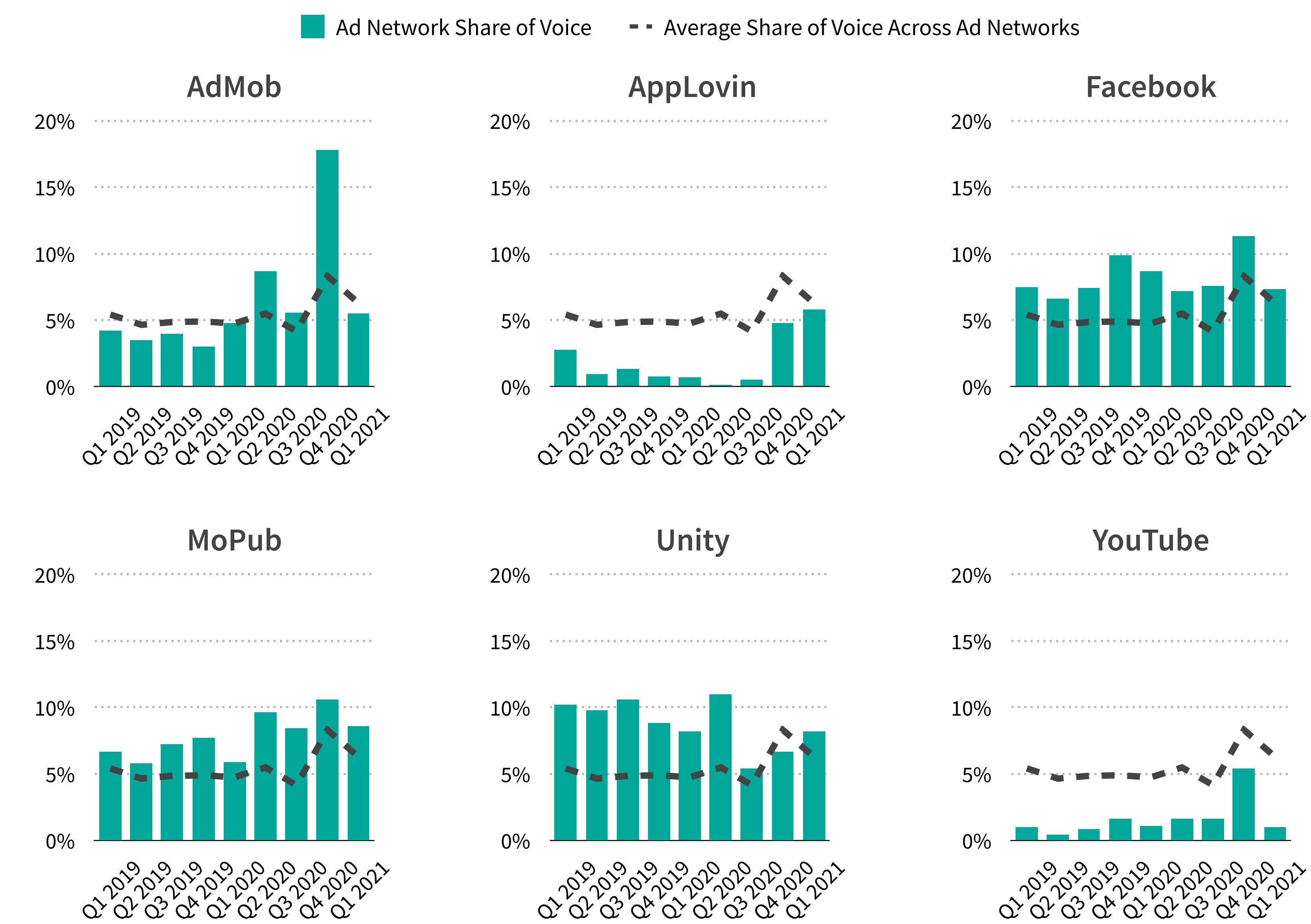
- 1  Homescapes
Playrix
- 2  Call of Duty: Mobile
Activision Blizzard
- 3  Fishdom
Playrix
- 4  Episode
Episode Interactive
- 5  State of Survival
FunPlus

YouTube

- 1  Call of Duty: Mobile
Activision Blizzard
- 2  Genshin Impact
miHoYo
- 3  RAID: Shadow Legends
Plarium
- 4  Coin Master
Moon Active
- 5  Rise of Kingdoms
Lilith Games

Zynga Advertising Increased After Hypercasual Acquisition

Zynga’s U.S. share of voice by ad network



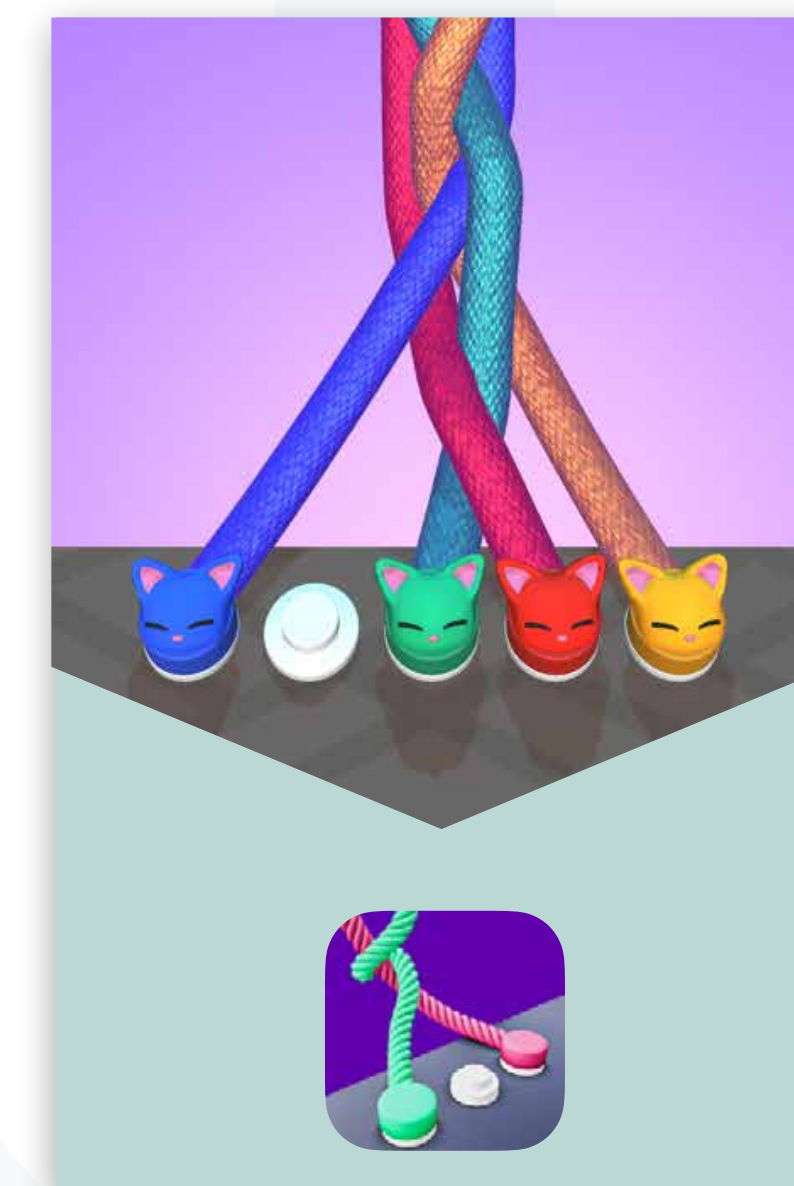
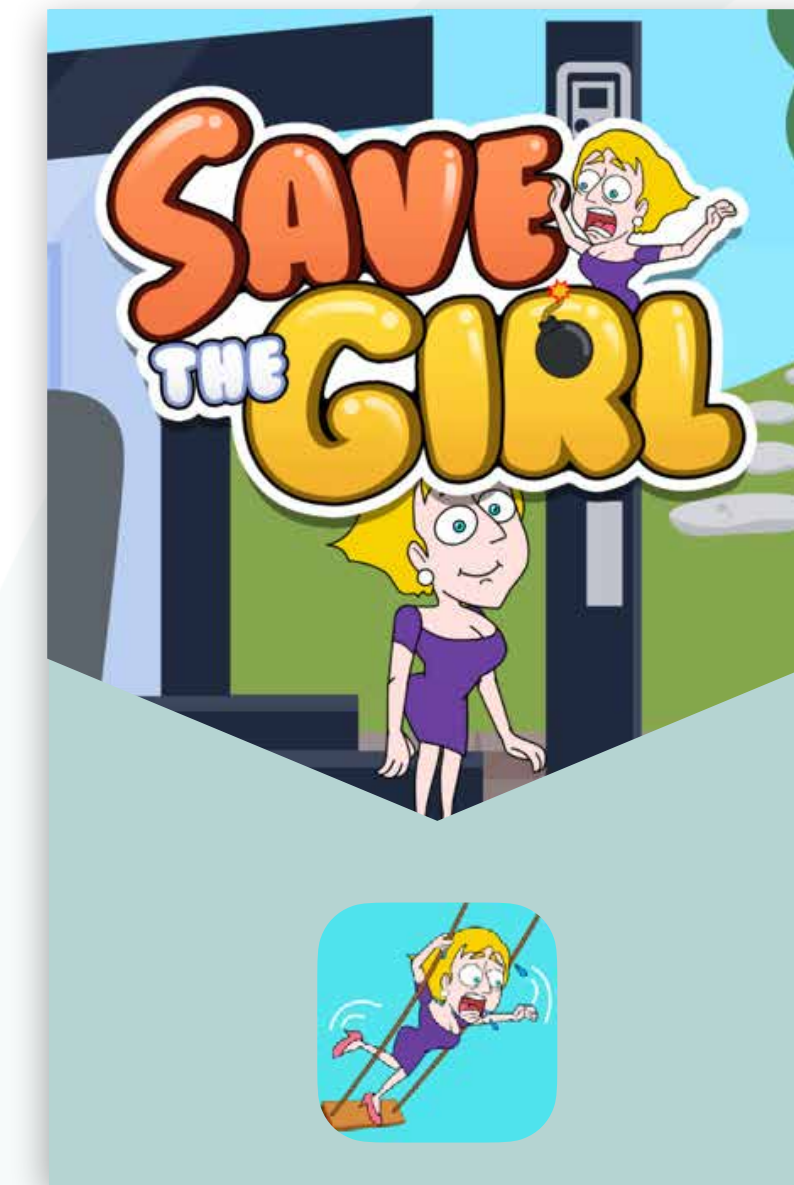
Zynga’s advertising surged in Q4 2020 along with its acquisition of hypercasual games publisher Rollic Games. While its share of voice dipped somewhat in Q1 2021, it was still higher than it had been in Q1 2019 through Q3 2020.

Zynga’s ad push in Q4 2020 was most pronounced on networks including AdMob, AppLovin, Facebook, and YouTube.

Note: Share of voice includes advertising from all games currently owned by Zynga, even if it was prior to the acquisition. Average share of voice takes the mean across 10 ad networks (AdMob, AppLovin, Chartboost, Facebook, Instagram, ironSource, MoPub, Unity, Vungle, and YouTube).

Key Takeaways: Advertising Trends

1. **Hypercasual and Puzzle games published the most ads across ad networks.**
Meanwhile, Puzzle games had the highest share of voice among game advertisers, suggested that these games are particularly reliant on advertising for user acquisition. Strategy and Hypercasual games also had a large portion of the share of voice on a few networks.
2. **Playrix continued to be one of the top advertisers in the U.S., with the highest share of voice on Adcolony, AdMob, and Vungle networks.** Its puzzle and decorate game Homescapes was the top advertising game on each of these networks, and it also advertised heavily for Gardenscapes and Fishdom.
3. **Zynga's acquisition of Hypercasual games publisher Rollic Games suggests that it still believes in the value of the genre despite the concerns around IDFA.** Zynga's share of voice surged following this acquisition.

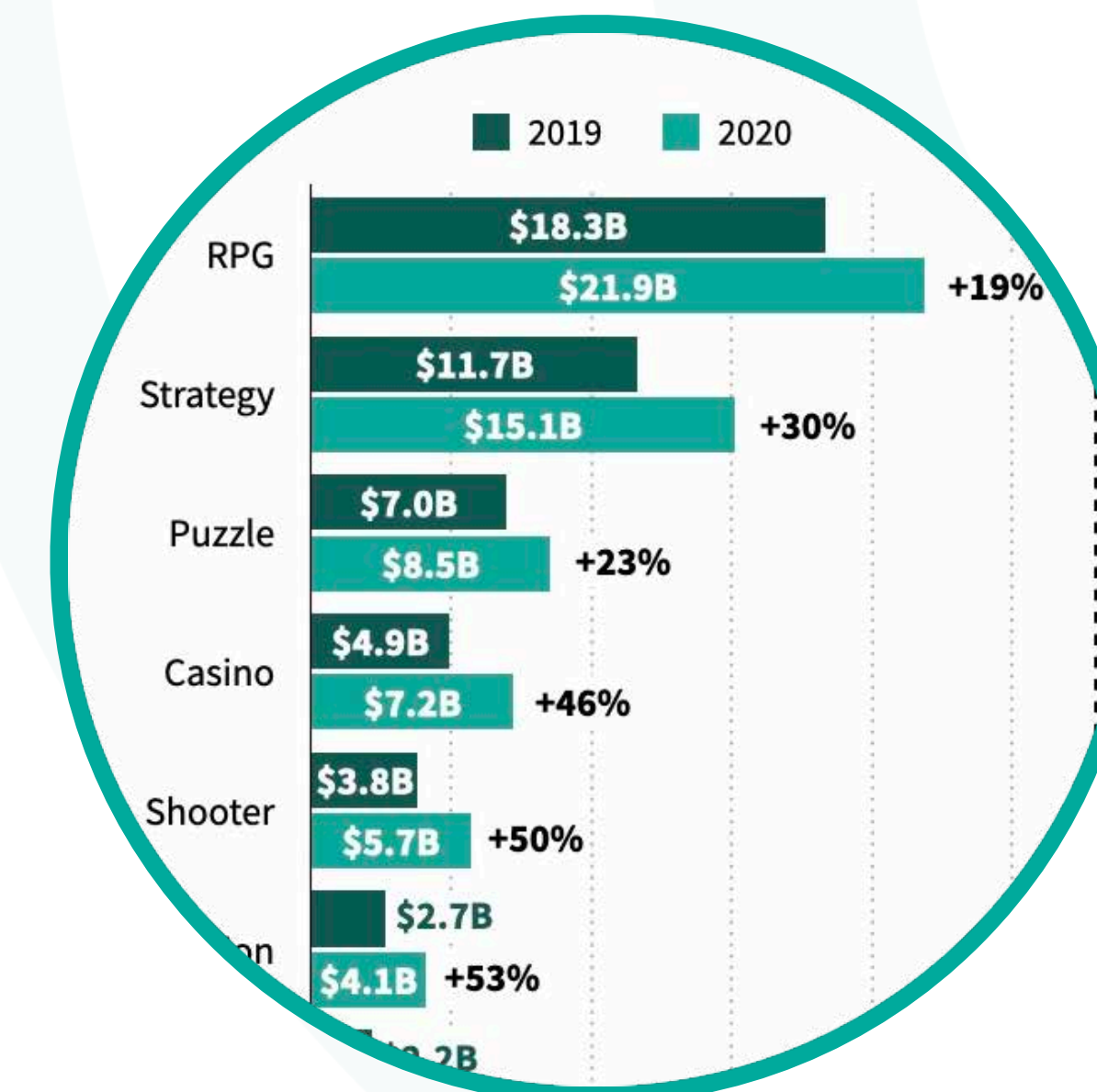
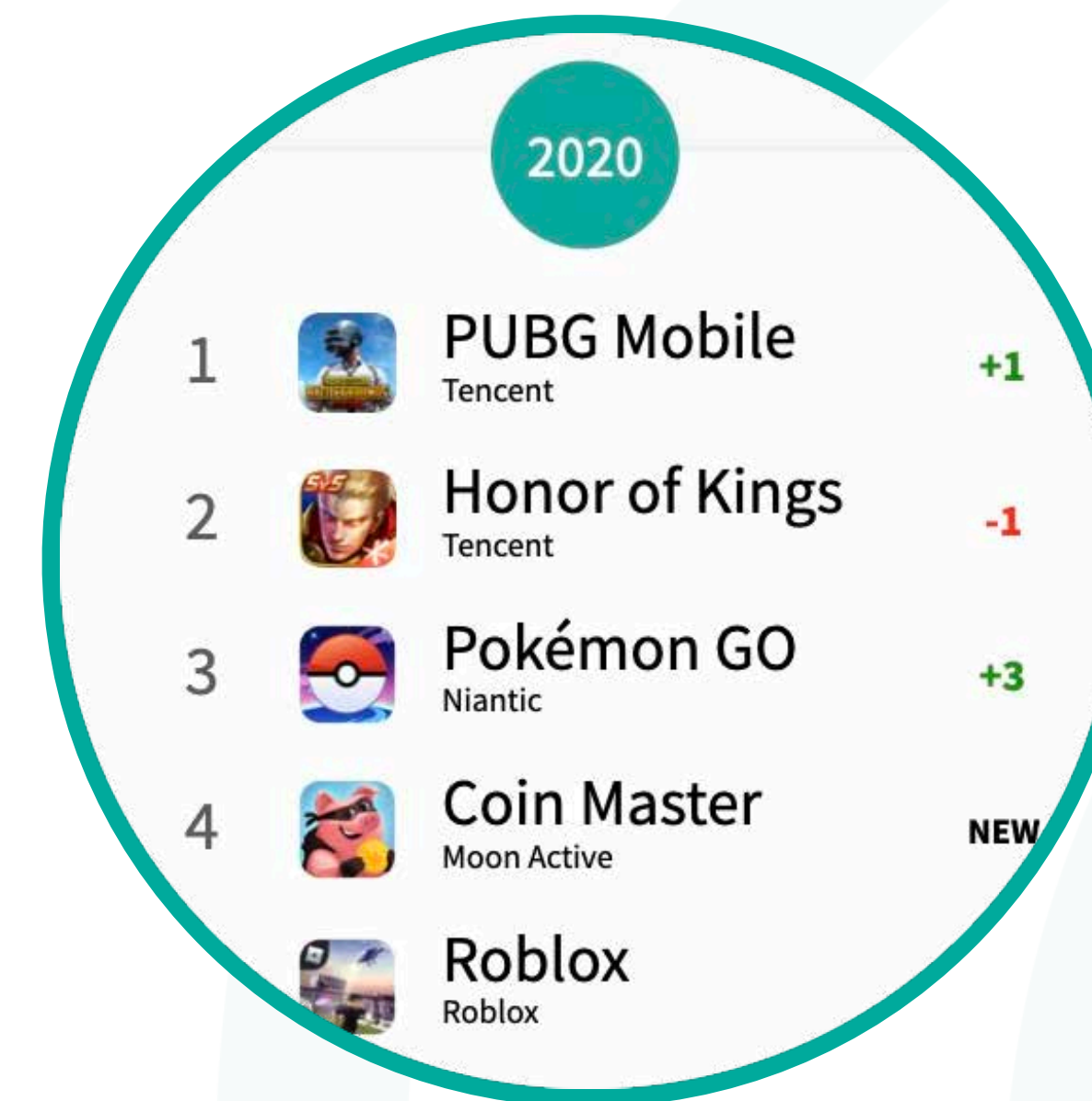


Conclusion

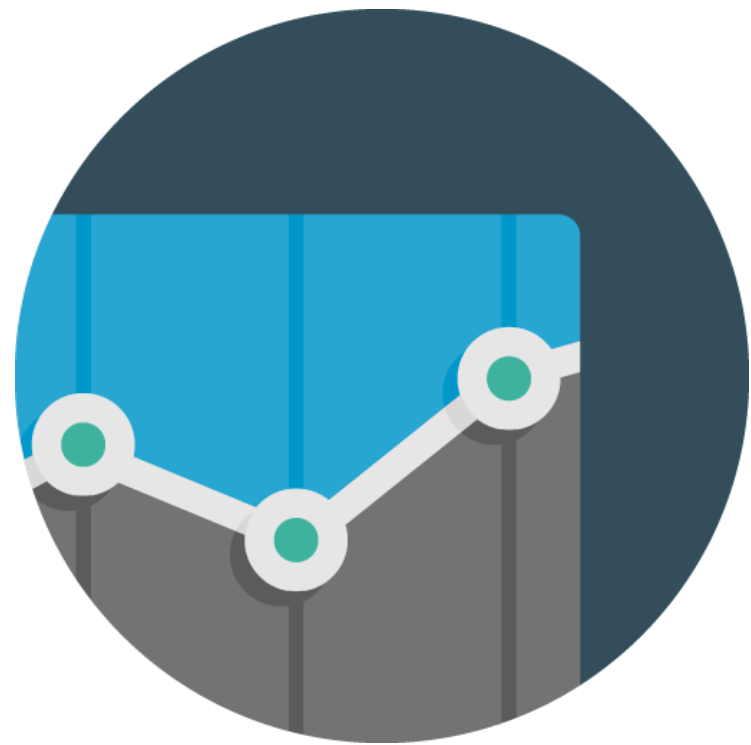
Key Takeaways from the Report

Conclusion

- The mobile games market was larger than ever in 2020 and shows no signs of slowing down. In fact, revenue growth only accelerated during the COVID-19 pandemic and users spent more than \$22 billion in mobile games in Q1 2021.
- The U.S. continues to be the top market for mobile game spending. Mobile game revenue in the country surged at the start of the pandemic, and the U.S. accounted for 28 percent of global game revenue in 2020. Meanwhile, Europe and Southeast Asia are also projected for strong growth over the next several years and are key regions for game developers to expand.
- Mobile game monetization has trended away from premium apps and towards the freemium and ad models in recent years. Some top games have had success with subscriptions, demonstrating how being creative with monetization strategies can give game developers an edge in such a competitive space. It will also be important to monitor how IDFA impacts mobile game advertising and genres such as Hypercasual and Puzzle that rely heavily on ads.



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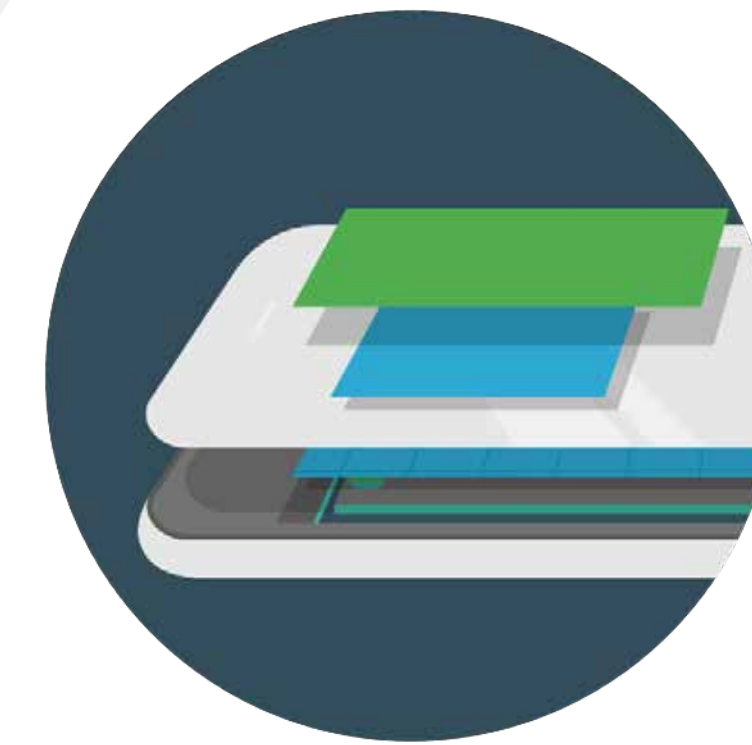
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