



Report

# Southeast Asia: Mobile Game Market Insights 2025



# About Sensor Tower

Sensor Tower is the leading source of mobile app, digital advertising, retail media, and audience insights for the largest brands and app publishers across the globe.

With a mission to measure the world's digital economy, Sensor Tower's award-winning platform delivers unmatched visibility into the mobile app and digital ecosystem, empowering organizations to stay ahead of changing market dynamics and make informed, strategic decisions.

Founded in 2013, Sensor Tower's mobile app insights have helped marketers, app, and game developers demystify the mobile app landscape with visibility into usage, engagement, and paid acquisition strategies. Today, Sensor Tower's digital market insights platform has expanded to include Audience, Retail Media, and Pathmatics Digital Advertising Insights, helping brands and advertisers understand their competitor's advertising strategies and audiences across web, social, and mobile.



Press Inquiries : [press-apac@sensortower.com](mailto:press-apac@sensortower.com)

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Health.



Johnson & Johnson



Note: Top publishers by app store revenue | Source: Sensor Tower



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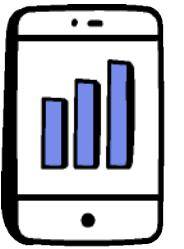


P&G

Revolut



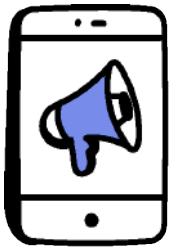
# Sensor Tower Solutions



## Sensor Tower **App Performance Insights**

**For those who need visibility into the mobile app ecosystem.**

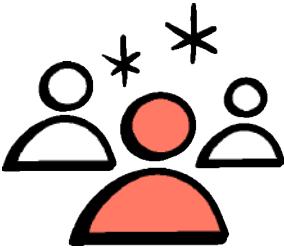
Enjoy insight into: app rankings, downloads, and revenue; active users, demographics, retention, sessions, and time spent; app ratings and reviews, keywords, search ads, and more.



## Sensor Tower **App Advertising Insights**

**For those who need visibility into paid user acquisition strategies.**

Enjoy insight into: global and regional share of voice (SOV) across apps and the biggest mobile app ad networks, top advertisers, publishers, creatives, and more.



## Sensor Tower **Audience Insights**

**For those who need visibility into your existing, competitor, and potential new audiences.**

Enjoy insight into: which apps consumers are actually interacting with (app engagement) AND which ads they're seeing (ad exposure).

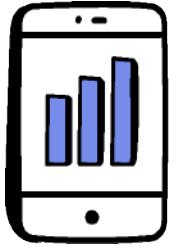


## Sensor Tower **Pathmatics Digital Advertising Insights**

**For those who need visibility into the digital ad ecosystem.**

Gain insight into: ads served, spend and impression estimates, SOV, and more across key channels, like: Facebook, Instagram, X (formerly Twitter), OTT, YouTube, display, video, and others.

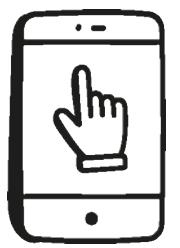
# Sensor Tower Solutions



## Sensor Tower **Gaming Insights**

**For those who need the deepest look into the mobile gaming ecosystem.**

Enjoy insight into: downloads, revenue, RPD, and ARPDAU beyond the top-level category (Lifestyle & Puzzle) and can drill deeper into genres (Puzzle, Arcade, etc.) and sub-genres (Swap, Word, etc.).



## Sensor Tower **Advanced Usage Insights**

**For those who need the deepest look into app user engagement.**

Enjoy insight into: sessions per user; time spent; time of day; days used per time period; new, retained, resurrected, and churned user trends; and cohort usage overlap.



## Sensor Tower **Pathmatics Retail Media Insights**

**For those who need industry-first insight into on- and off-site retail media network investments**

Enjoy insight into: ad spend, media mix, share of wallet, impressions, and SOV for brands and products across retailers – gaining a coveted view into the co-branded digital ad ecosystem and retail media networks.

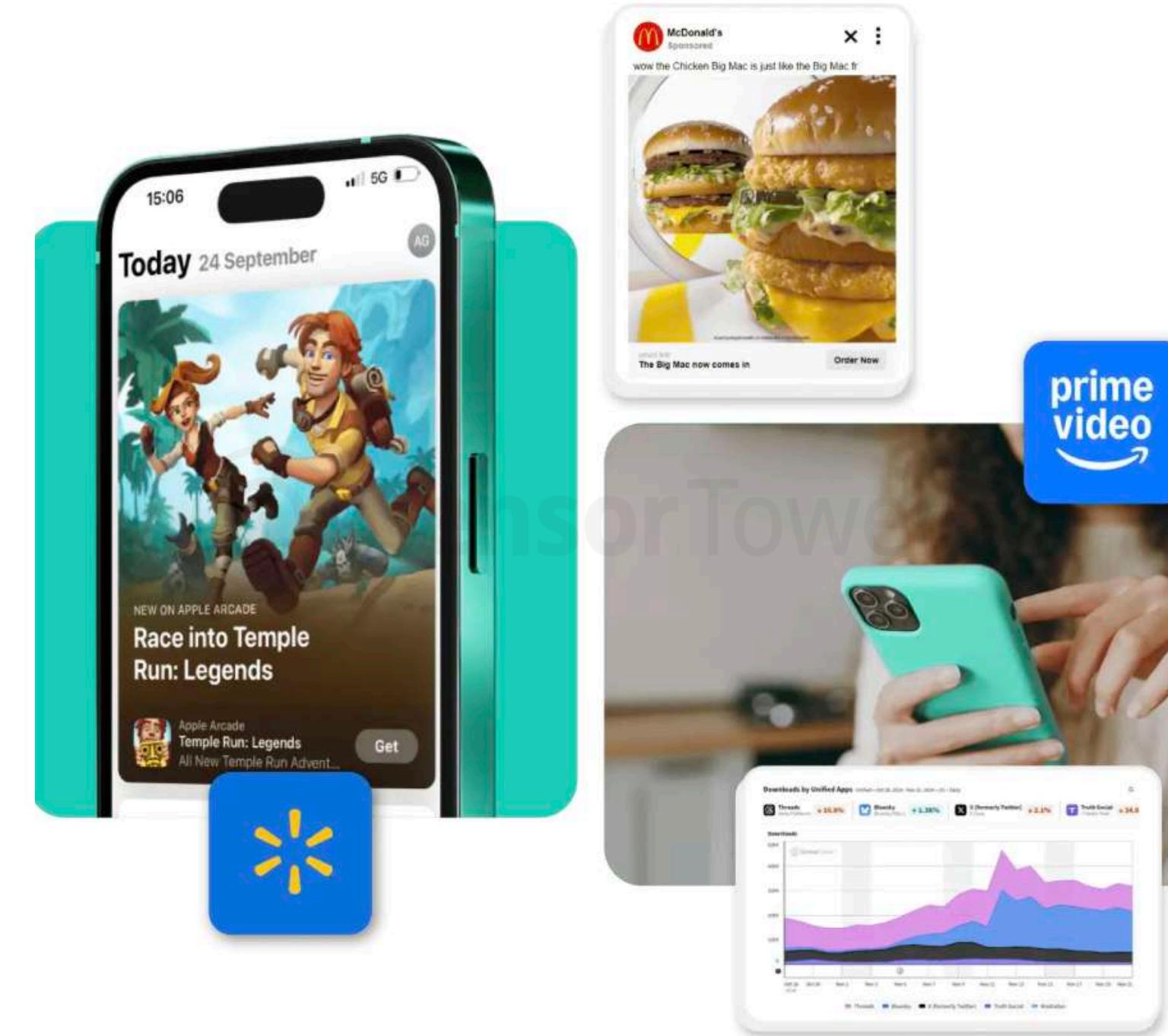
# Sensor Tower

## Executive Summary

This report provides an in-depth analysis of the App Store and Google Play mobile game markets in Southeast Asia in 2025, covering the overall revenue and download trends in these markets, revenue shares and trends across top game genres, download and revenue changes across different countries, as well as top mobile games by revenue and downloads. Featuring a case study on *Mobile Legends: Bang Bang*, this report also helps you understand how leading games successfully cultivate long-standing engagement within Southeast Asian markets.

### Clarification on Revenue and Downloads Data

Sensor Tower's revenue figures are derived from estimated in-app purchase (IAP) revenue on the App Store and Google Play, excluding ad revenue, revenue from third-party Android app-store sales, and direct payment revenue from developers' websites and other channels. Unless explicitly stated as net revenue, the revenue figures shown represent gross revenue (before platform deduction). Sensor Tower's downloads figures are derived from estimated downloads on the App Store and Google Play, excluding pre-installs, duplicate downloads, and downloads from third-party Android app-store. Google Play is not available in Mainland China.



# Sensor Tower

## Data & Methodology

Sensor Tower's **Pathmatics** empowers you to uncover insights into the digital advertising ecosystem, minimize ineffective ad spend, and enhance the precision of your advertising campaigns. With Pathmatics, you gain visibility into the digital advertising landscapes across markets including the United States, Australia, Brazil, Canada, France, Germany, Italy, Japan, Mexico, New Zealand, Spain, and the United Kingdom. Pathmatics provides comprehensive estimates on ad placements, spending, impressions, and share of voice (SOV), as well as in-depth analysis of brands' advertising strategies on platforms like Facebook, Instagram, X (formerly Twitter), YouTube, and TikTok, across formats such as display banners, videos, mobile, and OTT.

**Pathmatics** collects digital ad samples from the web and utilizes statistical sampling methods to estimate the impressions, cost-per-thousand impressions (CPM), and expenditure associated with each creative.

	Digital Advertising Channels Supported by Pathmatics Across Markets												
	United States	United Kingdom	Canada	Australia	New Zealand	Germany	Spain	Italy	France	Brazil	Mexico	Japan	South Korea
Facebook	●	●	●	●	●	●	●	●	●	●	●	●	●
Instagram	●	●	●	●	●	●	●	●	●	●	●	●	●
YouTube	●	●	●	●	●	●		●	●	●	●	●	●
TikTok	●	●	●	●		●	●	●	●	●	●	●	●
Snapchat	●	●	●	●		●	●	●	●				
X	●	●											●
LinkedIn	●	●	●			●							
Pinterest	●	●	●			●		●	●				
Reddit	●	●	●	●		●		●	●				
OTT	●												
Desktop Video	●	●	●	●	●	●							
Desktop Display	●	●	●	●	●	●							
Mobile Video	●	●	●	●	●	●							
Mobile Display	●	●	●	●	●	●							

# Agenda

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# Overview of the Southeast Asian Mobile Game Market



# Southeast Asia: A Mobile Gaming Powerhouse in Downloads with Significant Monetization Headroom

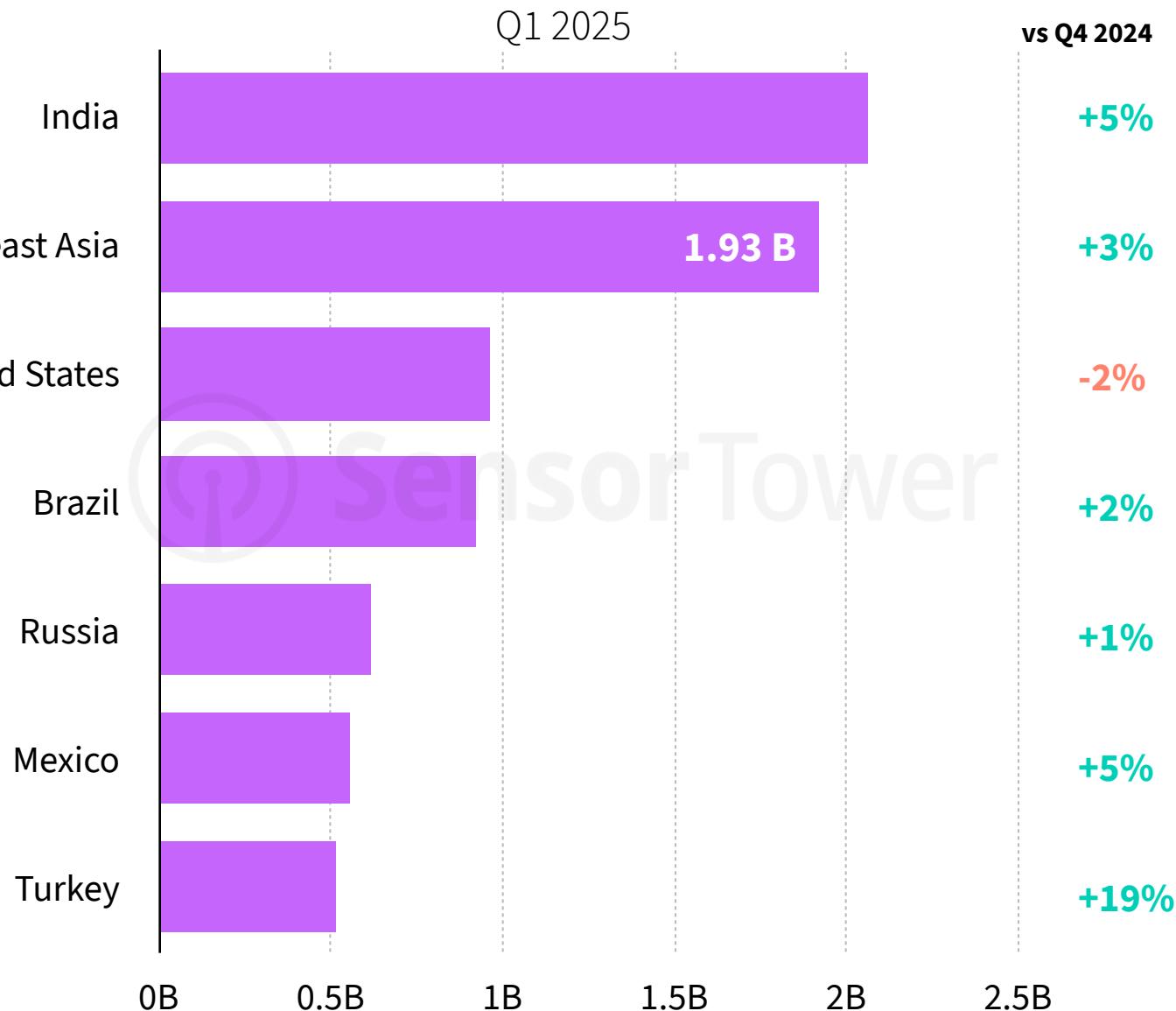
**Data Source:** Sensor Tower App Performance Insights.

**Notes:** Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

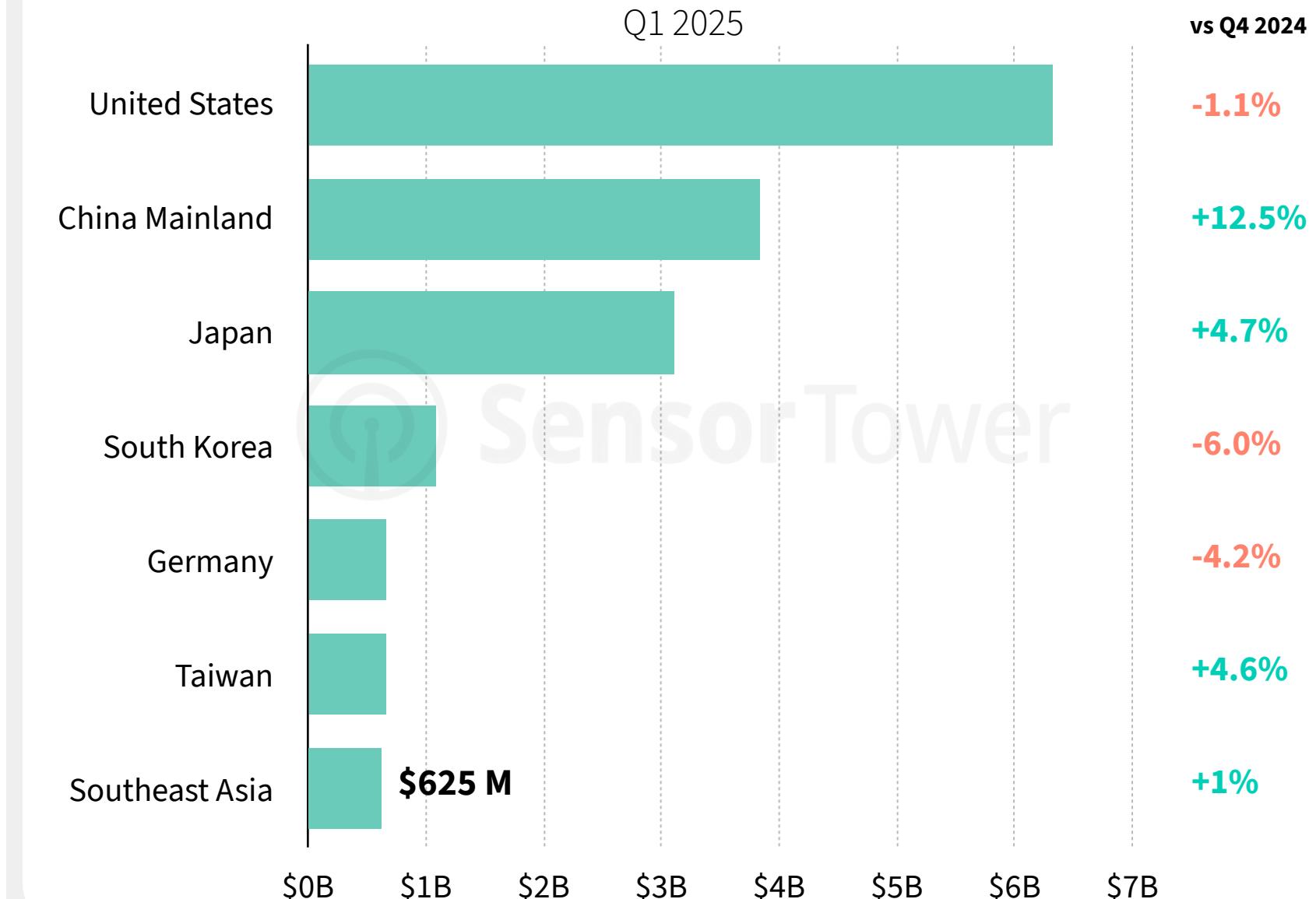
Southeast Asia stands as a pivotal region in the global mobile gaming industry, presenting significant opportunities for developers and publishers. Collectively, the region ranked #2 globally for mobile game downloads in Q1 2025, hitting 1.93 billion new installs—a 3% quarter-over-quarter rise from Q4 2024. This underscores the region's highly engaged and expanding player base, avid for new mobile gaming content and experiences.

Despite ranking #7th globally in Q1 2025 with \$625M in IAP revenue, Southeast Asia nonetheless demonstrates strong monetization potential. Its large gaming community, improved digital payments, and rising smartphone adoption are key drivers indicating untapped revenue. This strong download momentum should drive higher player spending, positioning the region for continued revenue growth.

**Global Mobile Game Markets by Downloads**



**Global Mobile Game Markets by IAP Revenue**

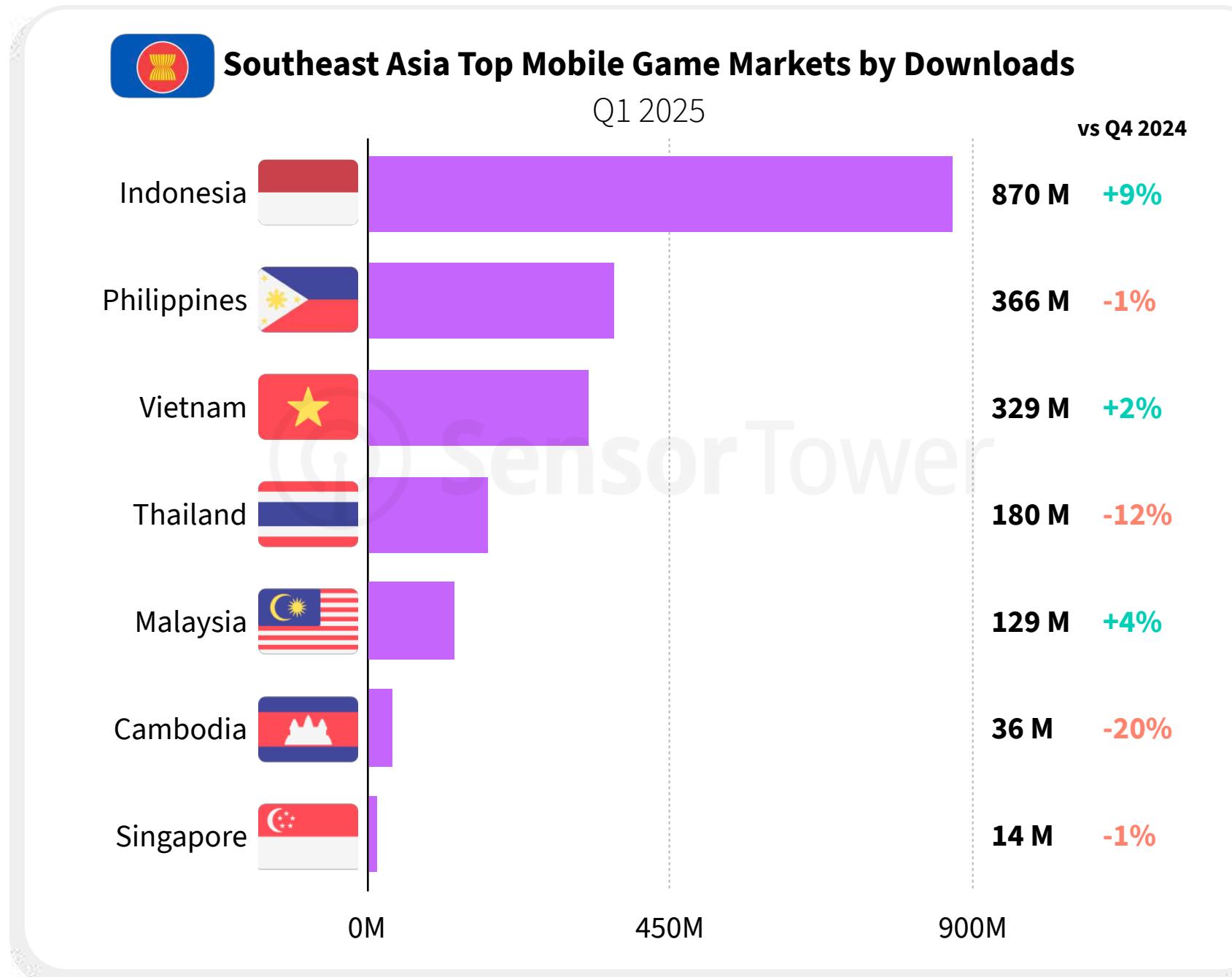


# SEA Mobile Gaming: Indonesia Leads Downloads, Thailand Leads IAP Revenue

**Data Source:** Sensor Tower App Performance Insights.

**Notes:** Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Indonesia remains the dominant force in Southeast Asian mobile game downloads with 870 million in Q1 2025, exhibiting a strong 9% growth from the previous quarter. Following are the Philippines and Vietnam with 366M and 329M downloads respectively. This reaffirms the critical role of Indonesia's large user population in driving mobile game installations across Southeast Asia.



Thailand leads SEA in mobile game revenue (\$162M) partly due to its strong digital payment infrastructure and greater cultural acceptance of in-app spending for upgrades and social play. This, alongside effective localization, drives higher average user spending despite a smaller population than bigger markets such as Indonesia and Philippines.



# Top Gaming Subgenres in Southeast Asia: Arcade and Simulators Lead Downloads, while Strategy, RPG and Shooters Lead Revenue

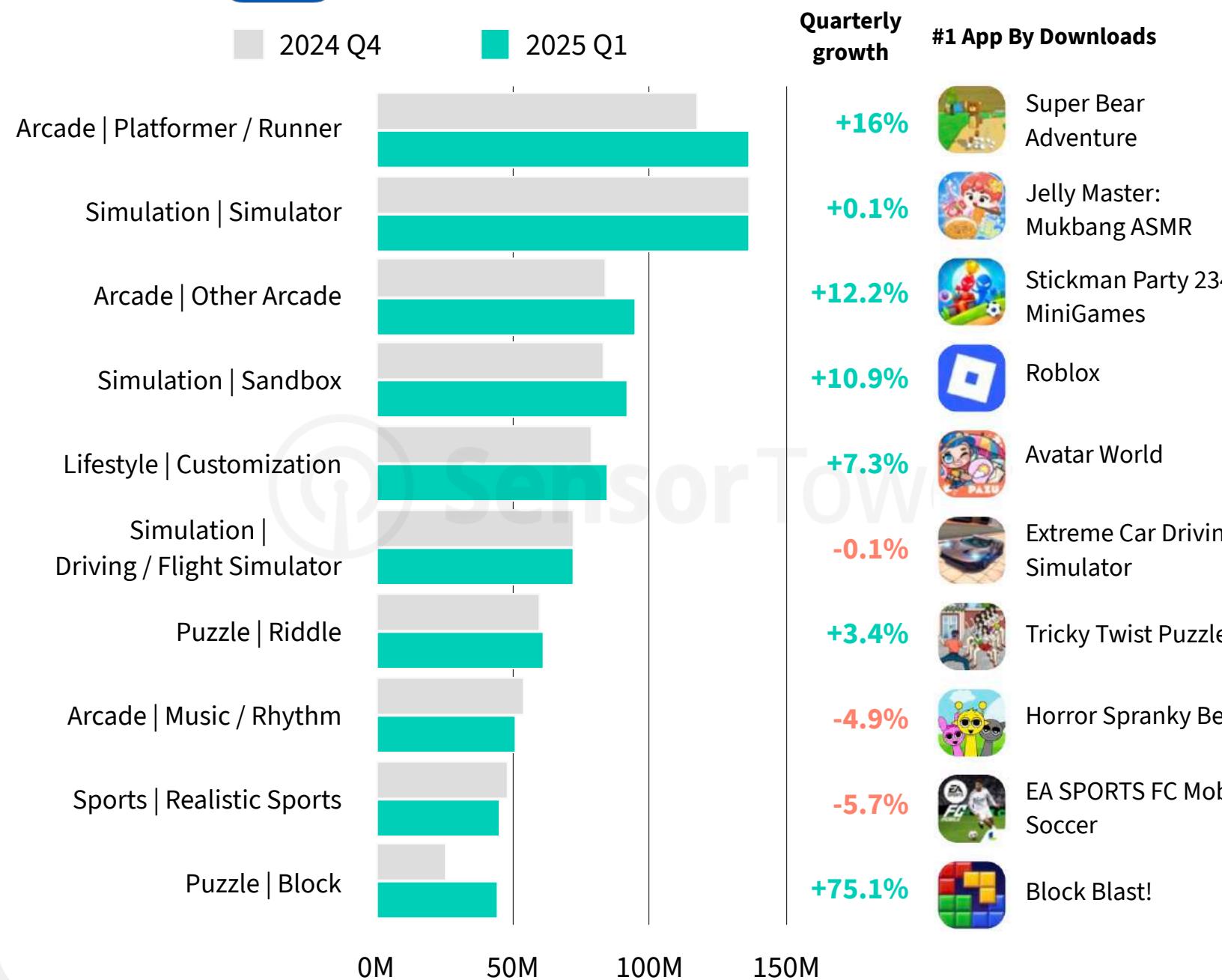
**Data Source:** Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.

**Notes:** Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

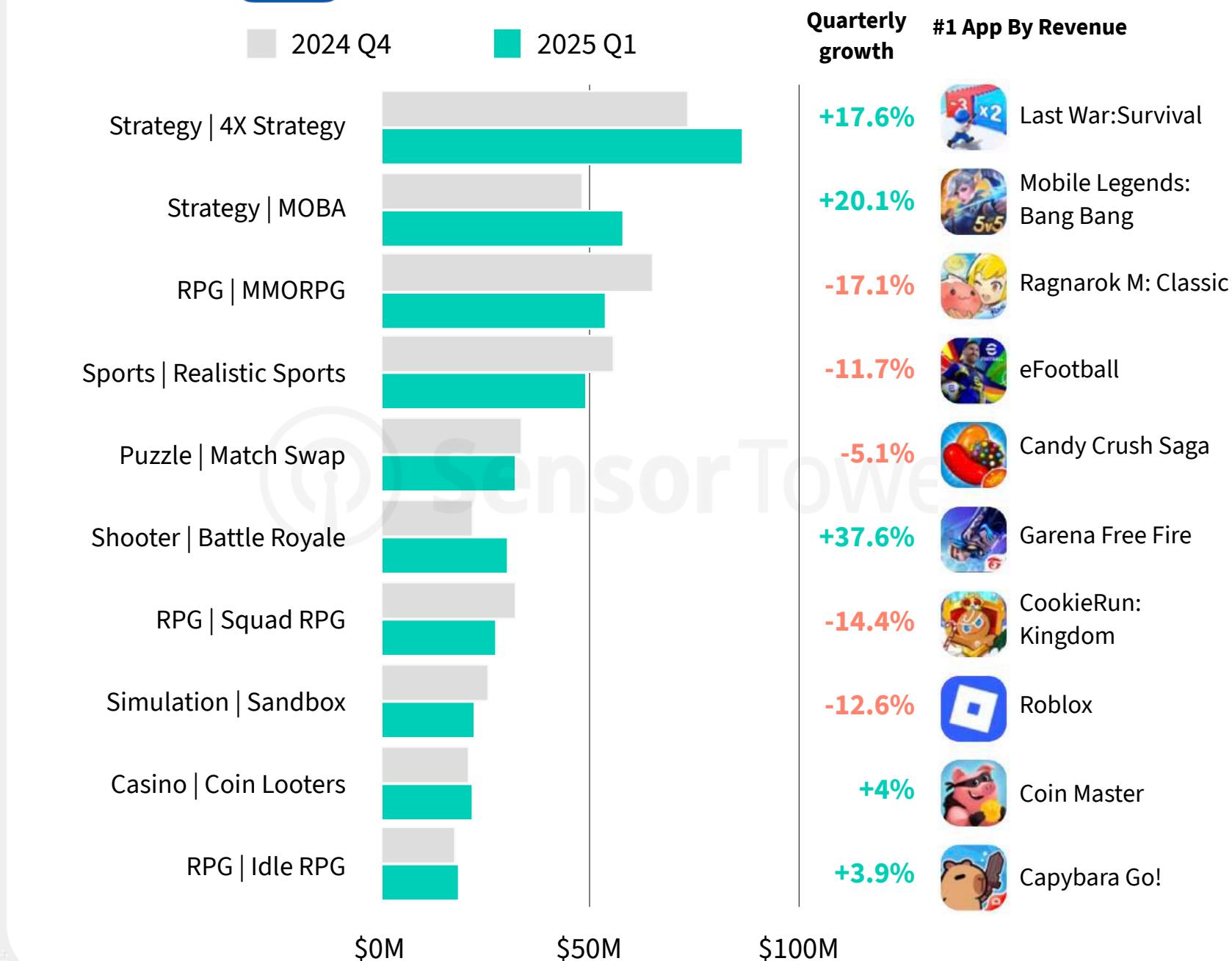
In Southeast Asia, casual genres such as Arcade and Simulation attract vast downloads thanks to their straightforward gameplay. Conversely, deeper genres like Strategy, Shooters, and especially social-driven RPGs—which thrive on collaborative or competitive interaction—command the bulk of IAP revenue. These games, particularly RPGs with integral community features and deep personalisation, effectively convert prolonged player commitment into revenue, as their inherent social dynamics drive both user acquisition and spending.



## Southeast Asia Top Subgenre by Downloads



## Southeast Asia Top Subgenre by IAP Revenue



# Mobile Legends Extends Revenue Reign in SEA Q1 2025 as Sports Titles Gain Spending Power; Downloads Driven by a Diverse Mix of Casual and Core Hits

**Data Source:** Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.

**Notes:** Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

While Garena Free Fire led downloads and Mobile Legends: Bang Bang dominated revenue and growth in Q1 2025, newer titles using popular IP gained notable traction. Moonton's Magic Chess: Go Go, for instance, surged to #2 in download growth. Likewise, the new Ragnarok M: Classic quickly hit the top 4 for revenue growth, underscoring franchise power in a dynamic market that also saw diverse casual and competitive successes.



## Top 10 Mobile Games in Southeast Asia Unified • Jan 1, 2025 - Mar 31, 2025

### Downloads

vs Q4 2024

1		Garena Free Fire	Garena Games Online	=
2		Block Blast!	HungryStudio	▲
3		Roblox	Roblox Corporation	=
4		Mobile Legends: Bang Bang	Moonton	▼
5		Magic Chess: Go Go	Moonton Games	▲
6		Super Bear Adventure	Earthkwak Games	▲
7		Stickman Party 234 MiniGames	PlayMax Game Studio	=
8		Worms Zone .io - Hungry Snake	Azur Interactive Games	▲
9		Last War:Survival	FUNFLY	▲
10		Subway Surfers	Miniclip.com	▼

### Downloads Growth

vs Q4 2024

1		Block Blast!	HungryStudio	▲
2		Magic Chess: Go Go	Moonton Games	▲
3		Super Bear Adventure	Earthkwak Games	▲
4		Garena Free Fire	Garena Games Online	=
5		Dalgona Candy Cookie Games	LIVDG LIMITED	▲
6		Roblox	Roblox Corporation	=
7		Cat Chaos: Prankster	Mirai Games	▲
8		Survival Escape: Prison Game	H2T GLOBAL	▲
9		FPS Strike Ops : Modern Arena	FPS Shooter	▲
10		Trở Về Tuổi Thơ	COROCHTI	NEW

### Revenue

vs Q4 2024

1		Mobile Legends: Bang Bang	Moonton Games	▲
2		eFootball™	Konami	▼
3		Last War:Survival	FUNFLY	▲
4		Garena Free Fire	Garena Games Online	▲
5		Roblox	Roblox Corporation	▼
6		EA SPORTS FC™ Mobile Soccer	Electronic Arts	▼
7		Coin Master	Moon Active	=
8		Whiteout Survival	Century Games	=
9		Candy Crush Saga	Microsoft Corporation	=
10		PUBG MOBILE	Tencent	▲

### Revenue Growth

vs Q4 2024

1		Mobile Legends: Bang Bang	Moonton Games	▲
2		Last War:Survival	FUNFLY	▲
3		Garena Free Fire	Garena Games Online	▲
4		Ragnarok M: Classic	GungHo Online Entertainment, Inc.	NEW
5		Dark War Survival	Florere Game	▲
6		Call of Duty®: Mobile	Microsoft Corporation	▲
7		PUBG MOBILE	Tencent	▲
8		Apex Girl	Tap4Fun	▲
9		TopHeroes	River Game HK	▲
10		Coin Master	Moon Active	=



# SEA Country Spotlights

## Top Genres and Games

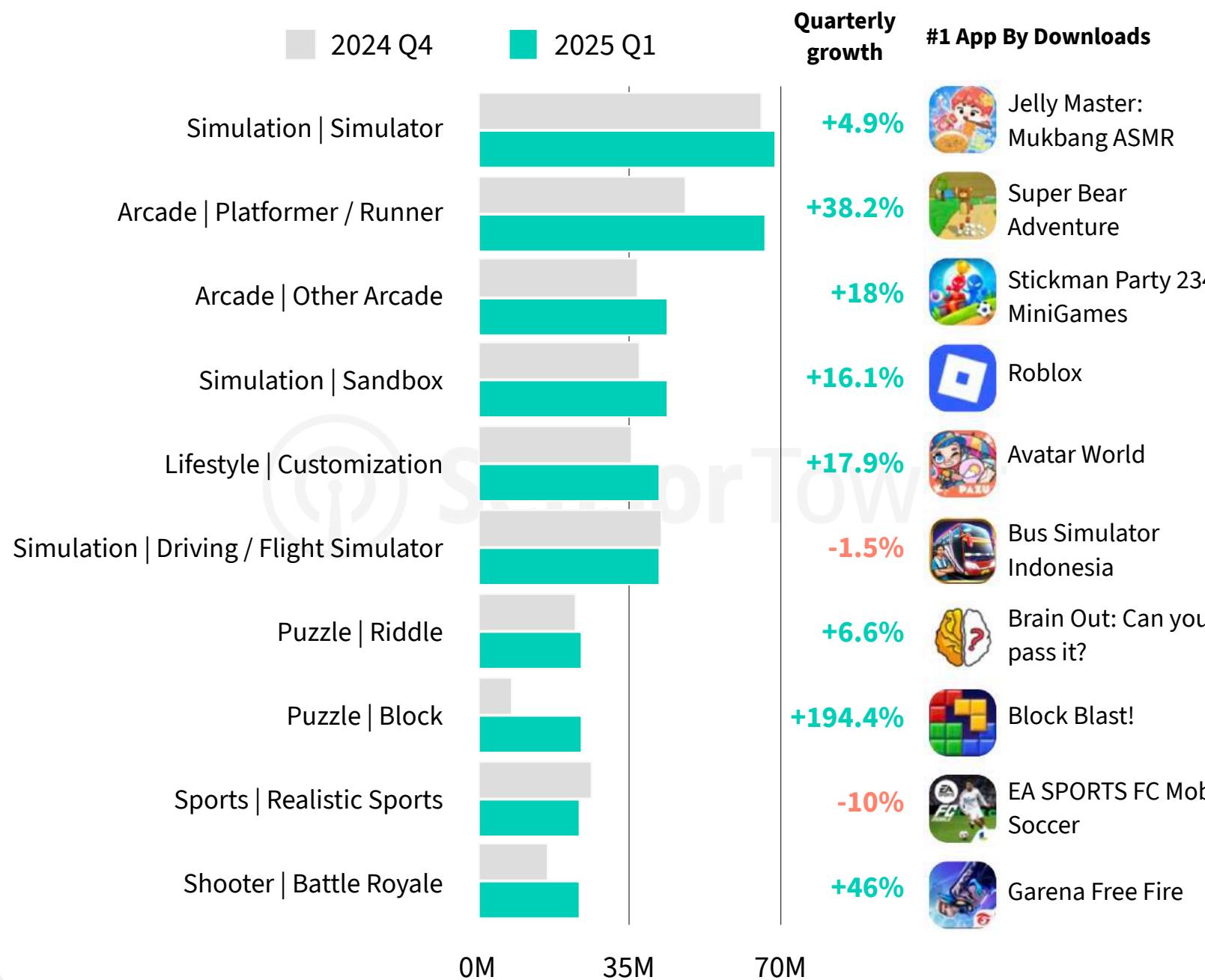
# Indonesia's Mobile Game Market Q1 2025: Simulation & Arcade Top Downloads, MOBA/Strategy Lead Revenue, While Shooters Surge in Growth

**Data Source:** Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.

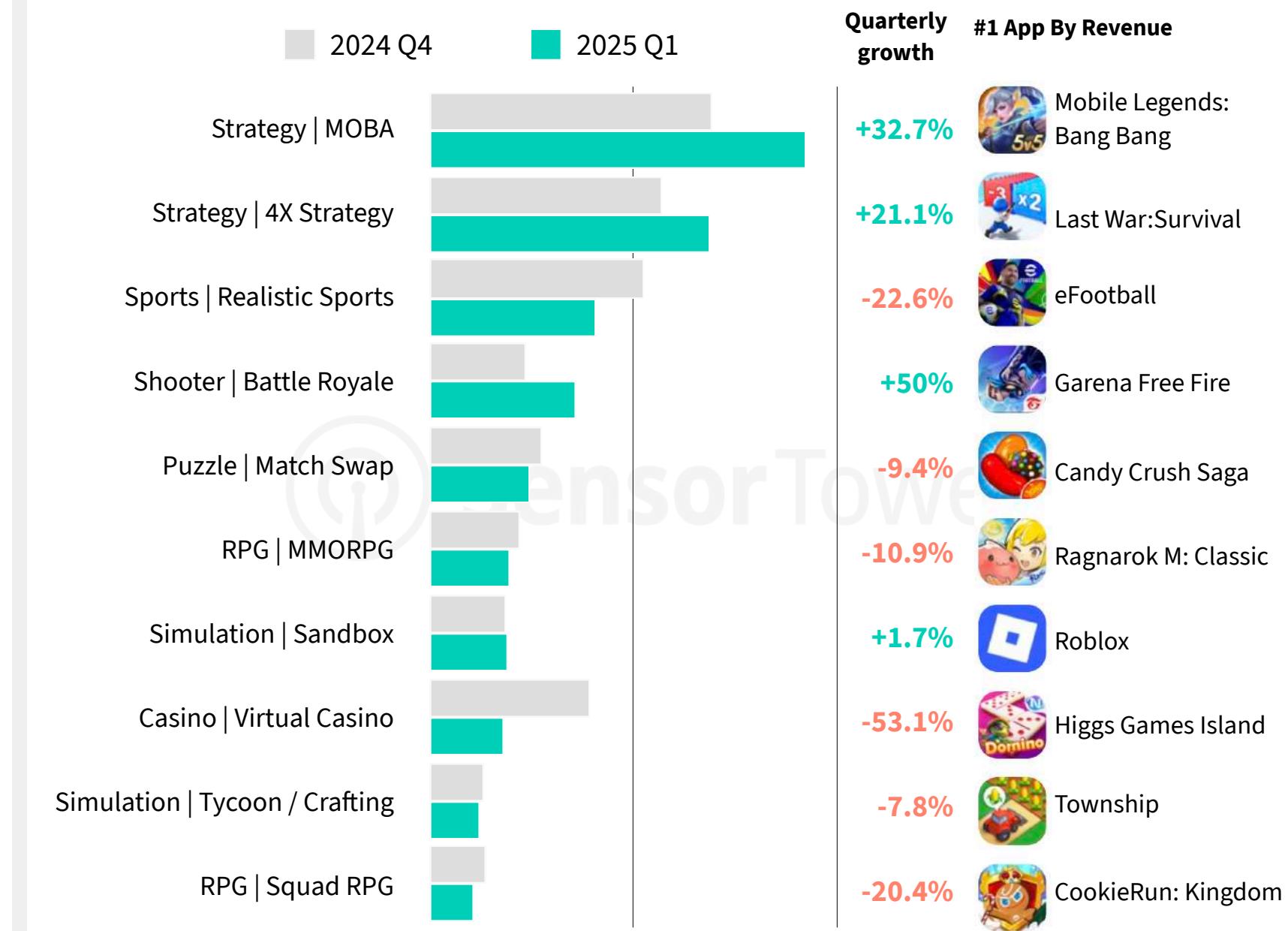
**Notes:** Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Simulator (led by *Jelly Master: Mukbang ASMR*) and Arcade Platformer/Runner (led by *Super Bear Adventure*) ranked as the top two subgenres by downloads in Indonesia, signaling strong appetite for fresh casual titles. Strategy/MOBA, spearheaded by *Mobile Legends: Bang Bang*, dominated Q1 revenue. Furthermore, Shooter/Battle Royale games, led by *Garena Free Fire*, showed exceptional momentum—revenue +50% QoQ and downloads +46% QoQ—its success driven by competitive and social interplay that deepens engagement and boosts monetization.

## Indonesia Top Subgenre by Downloads



## Indonesia Top Subgenre by Revenue



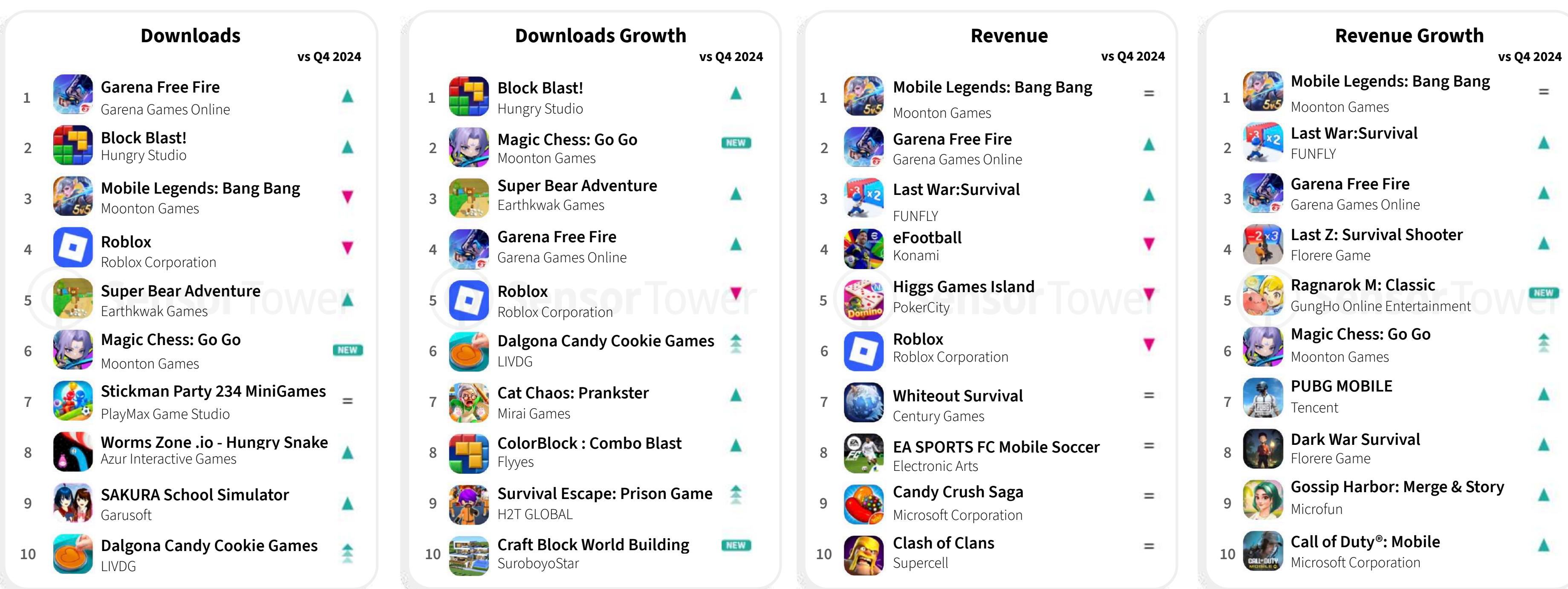
# Mobile Legends & Free Fire Maintain Lead in Indonesia, But Newcomers like Magic Chess: Go Go & Last War:Survival Signal Market Shift in Q1 2025

**Data Source:** Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.

**Notes:** Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Hyper-casual puzzle *Block Blast!* topped download growth, underscoring new accessible games' acquisition power. For revenue growth, newer strategy/survival entries like *Last War:Survival* and other emerging titles such as *Magic Chess: Go Go* and popular RPG *Ragnarok M: Classic* showed strong monetization, indicating a dynamic market receptive to fresh, engaging content.

## Top 10 Mobile Games in Indonesia Unified • Jan 1, 2025 - Mar 31, 2025



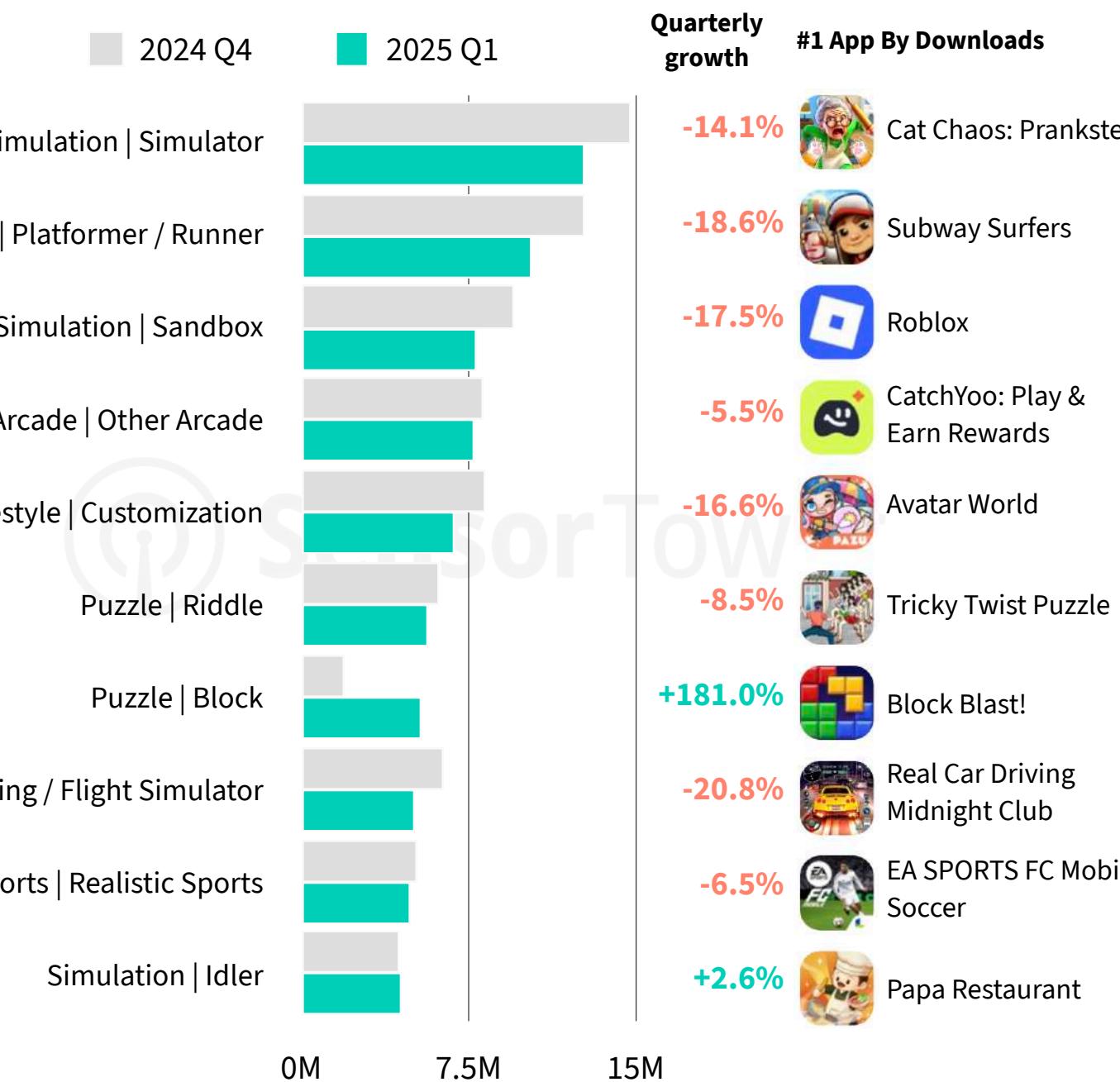
# Thailand Q1 2025: Realistic Sports Leads Revenue, Block Puzzle Surges Amidst Shifting Download Trends

**Data Source:** Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.

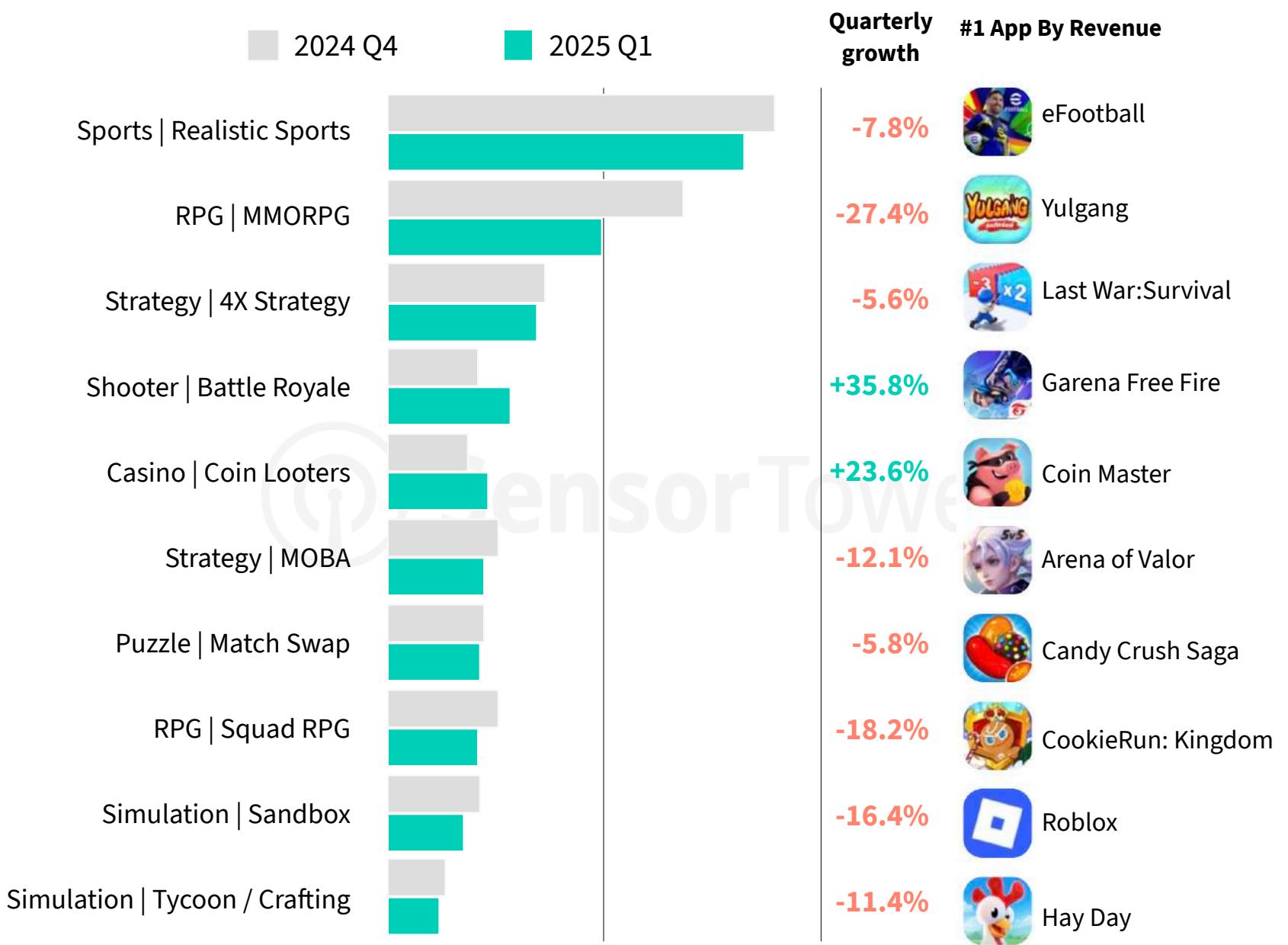
**Notes:** Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Simulators (led by *Cat Chaos: Prankster*) topped mobile downloads despite the category's overall decline, while *Block Blast!* powered an explosive +181% QoQ surge for Puzzle Block downloads. Thailand's unique revenue landscape was defined by Realistic Sports (spearheaded by *eFootball*) ranking as the quarter's top-grossing subgenre. Significant revenue growth also came from Battle Royale (led by *Garena Free Fire*), at 35.8% QoQ growth and Coin Looters (led by *Coin Master*), at 23.6% QoQ growth.

## Thailand Top Subgenre by Downloads



## Thailand Top Subgenre by Revenue



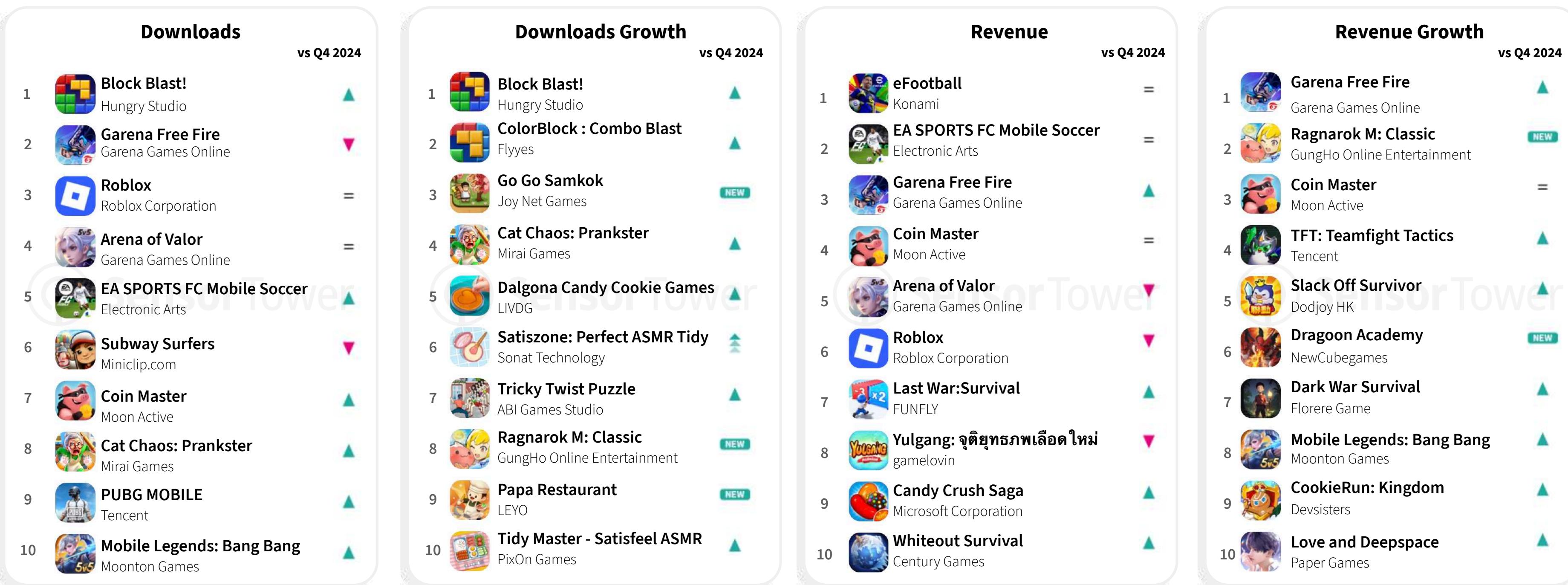
# Thailand Q1 2025: *Block Blast!* Dominates Downloads, Sports Games Lead Revenue, While *Free Fire* and *Ragnarok M: Classic* Spearhead Revenue Growth

**Data Source:** Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.

**Notes:** Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Beyond *Block Blast!*'s Q1 2025 download lead in Thailand, growth charts also featured new hyper-casual and simulation titles like *Go Go Samkok* and *Papa Restaurant*, signaling appetite for fresh, accessible content. While Sports games led spending, Thailand's revenue landscape remained diverse: *Arena of Valor* (MOBA), *Coin Master* (Coin Looter), and *Yulgang* (MMORPG) titles were also top earners, showing varied monetization paths.

## Top 10 Mobile Games in Thailand Unified • Jan 1, 2025 - Mar 31, 2025





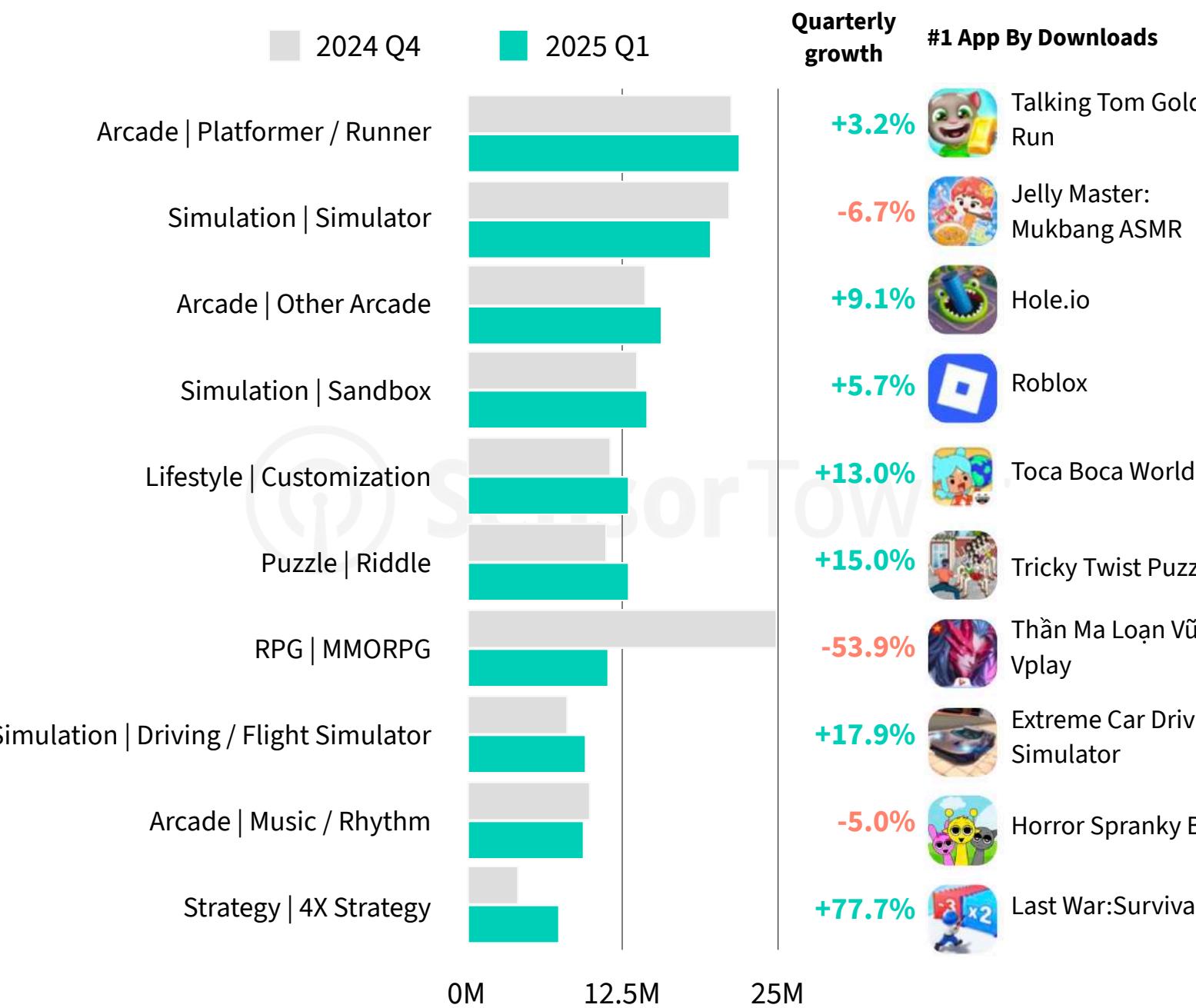
# Vietnam's Subgenre Landscape Q1 2025: 4X Strategy Dominates Growth, Puzzle & Casual Downloads Thrive, Core Genres Expand Revenue

**Data Source:** Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.

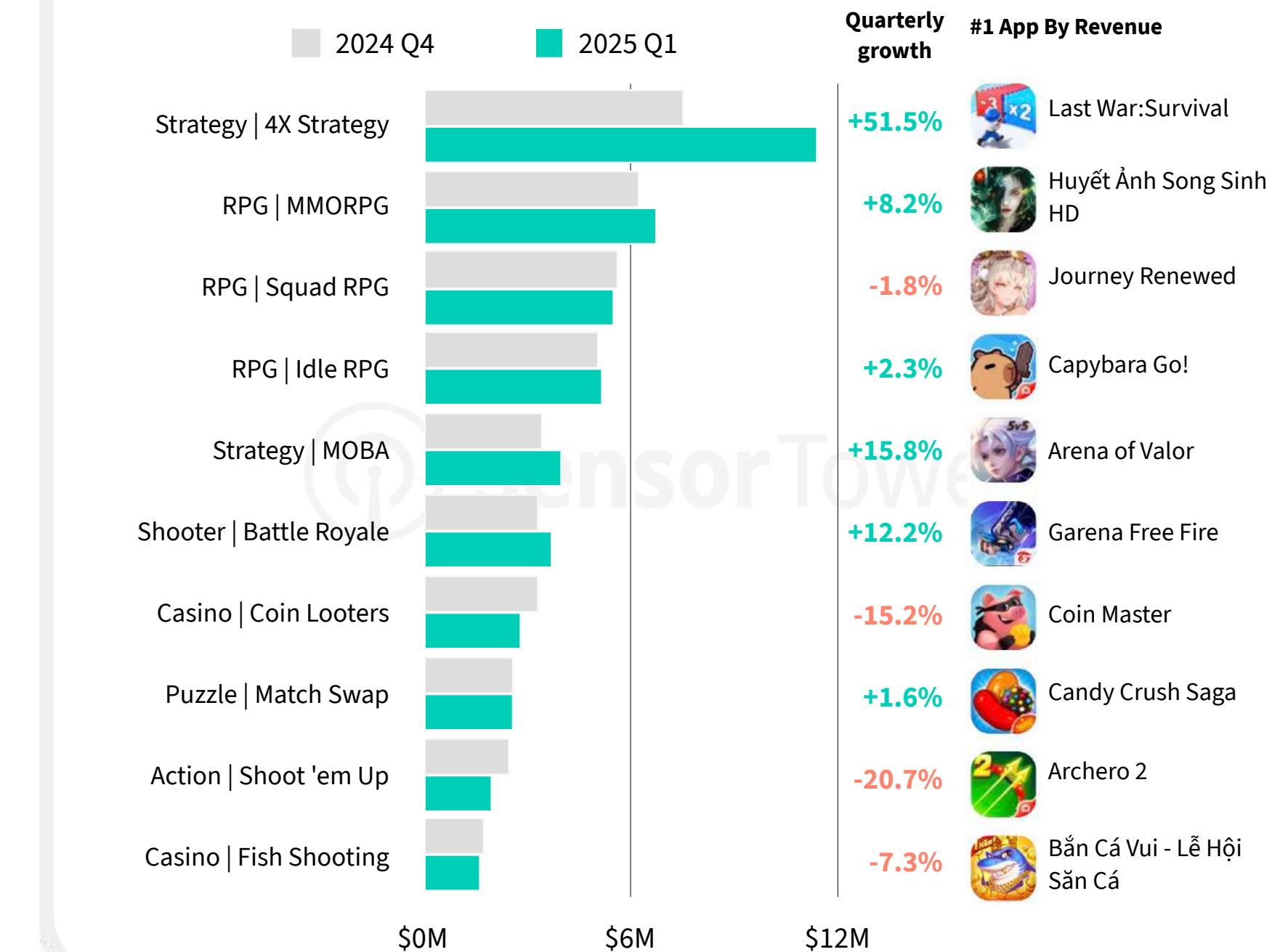
**Notes:** Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Platformer/Runner subgenres, led by *Talking Tom Gold Run* topped download volumes with steady growth; Puzzle Riddle games also climbed. For revenue, beyond 4X Strategy's surge in revenue, MMORPGs like *Huyết Ảnh Song Sinh HD* maintained healthy earnings, reflecting a market valuing diverse, immersive experiences, including single-player ones.

## Vietnam Top Subgenre by Downloads



## Vietnam Top Subgenre by Revenue



# Vietnam's Q1 2025 Top Games: Local Titles Fuels Download Growth, While New RPG/Strategy Titles Show Strong Monetization

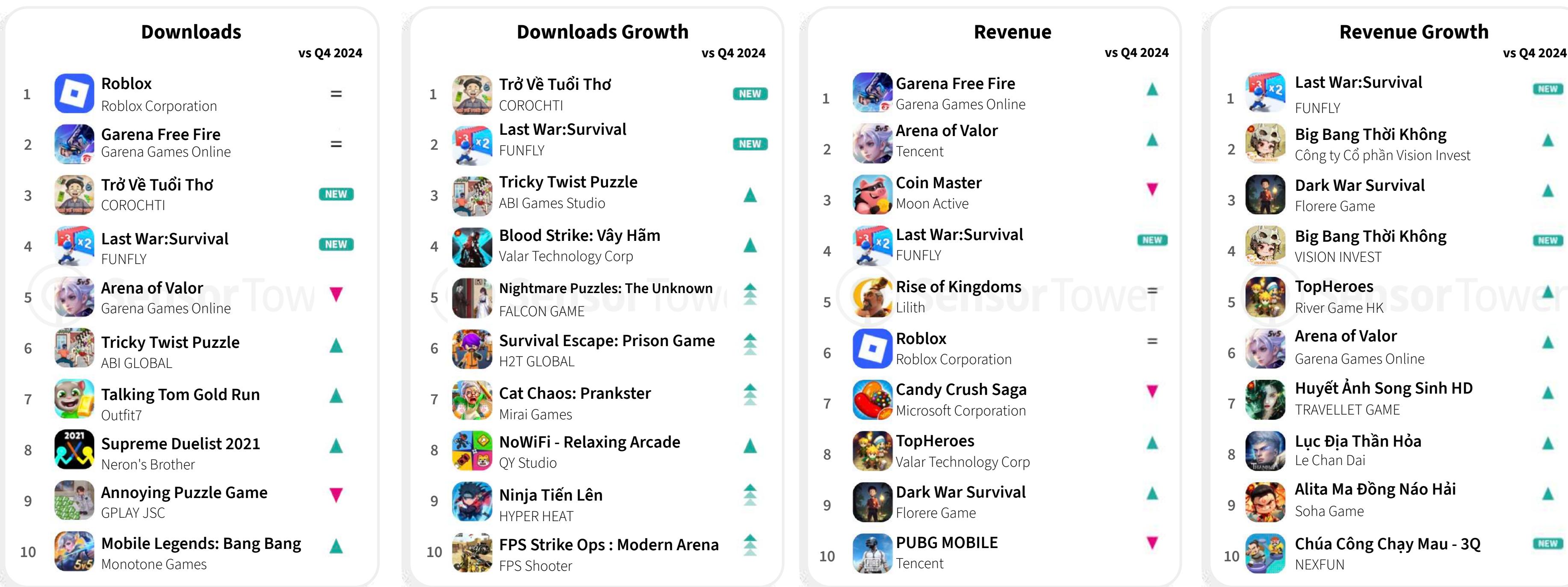
**Data Source:** Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.

**Notes:** Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Roblox remained Vietnam's top game by downloads, driven by the success of its localized version, while Garena Free Fire led revenue (also #2 in downloads). Local casual game *Trò Vẽ Vui Tuổi Thơ* showed strong organic appeal, leading download growth (#3 overall). International titles thrived such as *Last War:Survival* thrived alongside new, locally appealing RPG/Strategy games like *Big Bang Thời Không* and *Huyết Ảnh Song Sinh*, signaling a dynamic Vietnamese market where success often hinges on deep localization or strong local publishing partnerships.



## Top 10 Mobile Games in Vietnam Unified • Jan 1, 2025 - Mar 31, 2025





# Shooter Subgenres Shine in Philippines Q1 2025, Boosting Both Downloads and Revenue Growth Alongside 4X Strategy & MOBA

**Data Source:** Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.

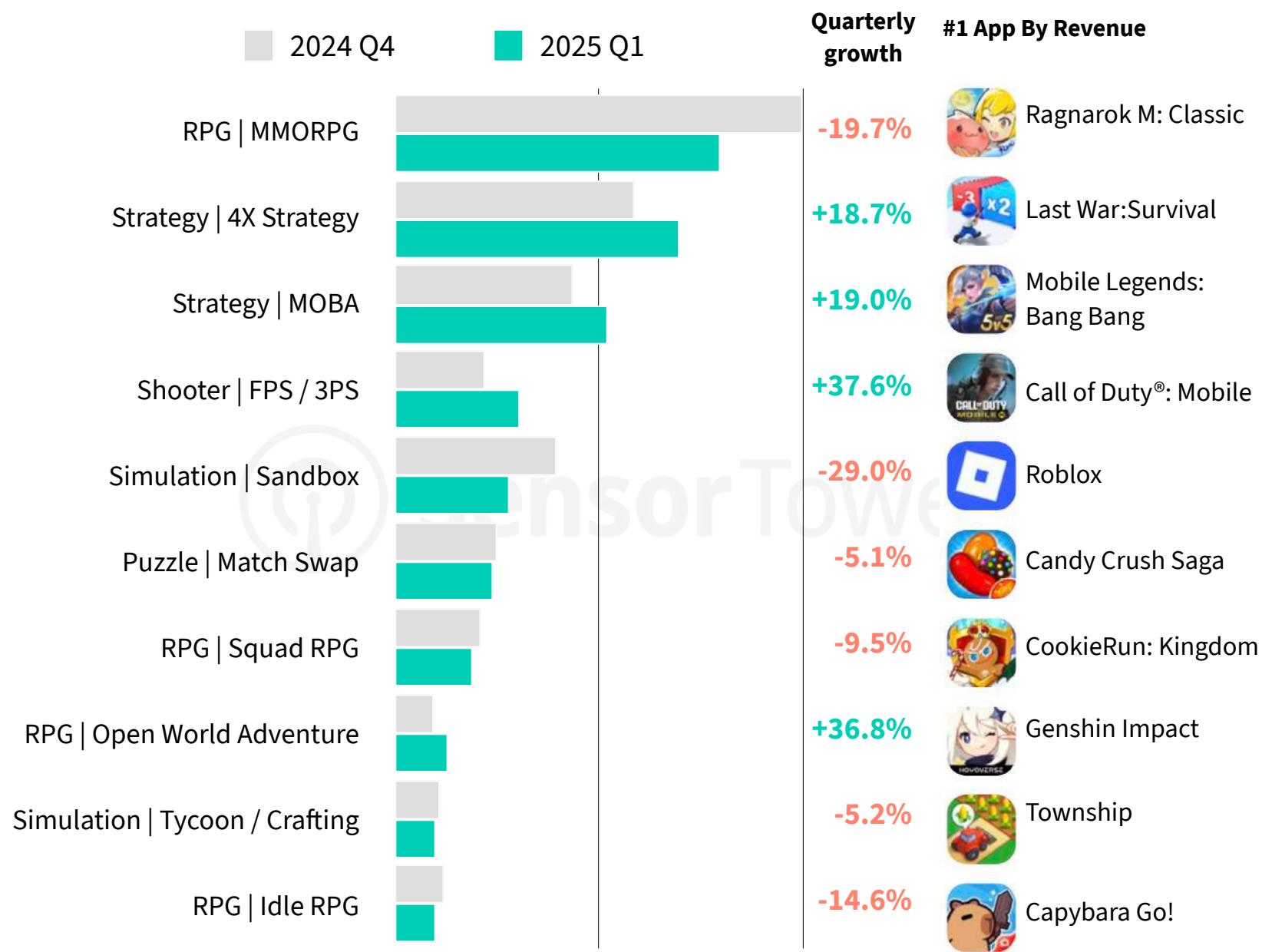
**Notes:** Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Platformer/Runner led download volumes with steady gains; Sandbox Simulation also expanded. While MMORPGs topped revenue by overall volume, the subgenre experienced a notable decline (-19.7% QoQ). Conversely, Open World Adventure RPGs like *Genshin Impact* posted strong revenue growth (+36.8% QoQ). This, coupled with softer demand in some casual download categories, indicates nuanced player preferences.

## Philippines Top Subgenre by Downloads



## Philippines Top Subgenre by Revenue



# Philippines Q1 2025: Newcomers Shine as *Magic Chess: Go Go* Leads Download Growth & *Ragnarok M: Classic* Tops Revenue Growth

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Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Hyper-casual *Block Blast!* secured top downloads, while MOBA powerhouse *Mobile Legends: Bang Bang* dominated overall revenue and also ranked #2 in revenue growth. Beyond the specific newcomers leading growth charts, diverse new titles like horror game *Hapunan Horror Game* also surged in downloads. Established core titles such as *Call of Duty: Mobile* further demonstrated notable strength, ranking high in both revenue and its growth.



## Top 10 Mobile Games in Philippines Unified • Jan 1, 2025 - Mar 31, 2025

### Downloads

vs Q4 2024

Rank	Game	Developer	Change
1	Block Blast!	Hungry Studio	=
2	Mobile Legends: Bang Bang	Moonton Games	=
3	Roblox	Roblox Corporation	=
4	Magic Chess: Go Go	Moonton Games	NEW
5	Hapunan Horror Game	2002 Studio	NEW
6	Call of Duty®: Mobile	Microsoft Corporation	▲
7	Stickman Party 234 MiniGames	PlayMax Game Studio	▲
8	Honor of Kings	Tencent	▲
9	Subway Surfers	Miniclip.com	▼
10	My Supermarket Simulator 3D	Game District	▼

### Downloads Growth

vs Q4 2024

Rank	Game	Developer	Change
1	Magic Chess: Go Go	Moonton Games	NEW
2	Hapunan Horror Game	2002 Studio	NEW
3	I Am Security	Estoty	NEW
4	FPS Strike Ops : Modern Arena	FPS Shooter	▲
5	Survival Escape: Prison Game	H2T GLOBAL	▲
6	Cat Chaos: Prankster	Mirai Games	▲
7	Good Coffee, Great Coffee	TAPBLAZE	NEW
8	Plinko Lucky 365	OctopusMD	▲
9	SCHOOLBOY RUNAWAY -	Linked Squad	▲
10	Color Game-color game	EasyWinz	NEW

### Revenue

vs Q4 2024

Rank	Game	Developer	Change
1	Mobile Legends: Bang Bang	Moonton Games	▲
2	Call of Duty®: Mobile	Microsoft Corporation	▲
3	Roblox	Roblox Corporation	▼
4	Last War:Survival	FUNFLY	=
5	Ragnarok M: Classic	GungHo Online Entertainment	NEW
6	Dark War Survival	Florere Game	▲
7	Clash of Clans	Supercell	=
8	MU Monarch	WEBZEN	▼
9	Genshin Impact	miHoYo	▲
10	Whiteout Survival	Century Games	▼

### Revenue Growth

vs Q4 2024

Rank	Game	Developer	Change
1	Ragnarok M: Classic	GungHo Online Entertainment	NEW
2	Mobile Legends: Bang Bang	Moonton Games	▲
3	Call of Duty®: Mobile	Microsoft Corporation	▲
4	Dark War Survival	Florere Game	▲
5	Last War:Survival	FUNFLY	=
6	Genshin Impact	miHoYo	▲
7	TopHeroes	River Game HK	▲
8	CookieRun: Kingdom	Devsisters	▲
9	Ragnarok Idle Adventure Plus	Gravity Game Hub	NEW
10	Love and Deepspace	Paper Games	▲



# Case Study

# Mobile Legends Bang Bang



# Mobile Legends: Bang Bang

Moonton Games



*Mobile Legends: Bang Bang* (MLBB) maintains remarkable dominance in Southeast Asia, consistently ranking as the region's #1 revenue-generating game in Q1 2025. Launched in 2016, MLBB quickly became an SEA powerhouse, consistently a top 4 download performer and holding a top 2 revenue spot regionally since 2017. This enduring success is largely attributed to Moonton's Hyper-Local Engagement Strategies, including localized content, regional folklore-inspired heroes, dedicated tournaments, and strong community building, keeping MLBB culturally resonant and deeply embedded in SEA's gaming fabric.

## Game Overview

<b>Release Date</b>	November 2016	<b>Art Style</b>	Stylised Realistic
<b>Genre</b>	Strategy	<b>Camera POV</b>	Top-Down
<b>Sub-Genre</b>	MOBA	<b>Monetization</b>	Paid Game, Live Ops, Season Pass, Subscription, Currency Bundles, Starter Pack, Loot Box
<b>Product Model</b>	Mid-core	<b>Game Tags</b>	Character Collection, Co-op, External Stores, Multi-platform, PvP
<b>Setting</b>	High Fantasy		
<b>Theme</b>	Combat Arena		

Source : Sensor Tower App Intelligence

# Mobile Legends: A Dominant Force Across Southeast Asia, Consistently Topping Mobile Game Revenue & Download Charts from 2017 through Q1 2025

**Data Source:** Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.

**Notes:** Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.



## Southeast Asia Top Games by Downloads (2017 - 2025)

#	2017	2018	2019	2020	2021	2022	2023	2024	2025 Q1
1	Mobile Legends: Bang Bang	Mobile Legends: Bang Bang	Garena Free Fire	Worms Zone .io - Hungry Snake	Garena Free Fire	Garena Free Fire	Garena Free Fire	Garena Free Fire	Garena Free Fire
2	Arena of Valor	Helix Jump	Mobile Legends: Bang Bang	Among Us	Mobile Legends: Bang Bang	Mobile Legends: Bang Bang	Mobile Legends: Bang Bang	Mobile Legends: Bang Bang	Block Blast!
3	Subway Surfers	Garena Free Fire	PUBG MOBILE	Mobile Legends: Bang Bang	Higgs Games Island	Roblox	Roblox	Roblox	Roblox
4	Clash of Clans	PUBG MOBILE	Tiles Hop EDM Rush	Garena Free Fire	Roblox	Subway Surfers	8 Ball Pool	Stickman Party 234 MiniGames	Mobile Legends: Bang Bang
5	My Talking Tom	Arena of Valor	Subway Surfers	Brain Out: Can you pass it?	Worms Zone .io	Stumble Guys	Stickman Party 234 MiniGames	Block Blast!	Magic Chess: Go Go



## Southeast Asia Top Games by Revenue (2017 - 2025)

#	2017	2018	2019	2020	2021	2022	2023	2024	2025 Q1
1	Mobile Legends: Bang Bang	Mobile Legends: Bang Bang	Garena Free Fire	Garena Free Fire	Garena Free Fire	Mobile Legends: Bang Bang			
2	Lords Mobile: Kingdom Wars	Lords Mobile: Kingdom Wars	Mobile Legends: Bang Bang	Mobile Legends: Bang Bang	Mobile Legends: Bang Bang	Garena Free Fire	Roblox	eFootball	eFootball
3	Legacy of Discord-FuriousWings	Arena of Valor	PUBG MOBILE	PUBG MOBILE	Genshin Impact	Genshin Impact	Garena Free Fire	Roblox	Last War:Survival
4	Arena of Valor	Dragon Nest M - SEA	Ragnarok M: Eternal Love	Rise of Kingdoms	PUBG MOBILE	Roblox	Arena of Valor	Garena Free Fire	Garena Free Fire
5	Lineage 2: Revolution	Garena Free Fire	Rise of Kingdoms	Coin Master	Roblox	Arena of Valor	eFootball	Coin Master	Roblox

# How Mobile Legends Wins Hearts: Hyper-Local Engagement Strategies

Data Source: Sensor Tower App Advertising Insights

## Community Bonding Through Local Culture Initiatives

Ini dia keseruan acara 100 Community Hero & Moonton Student Leader MLBB ID berbagi berkah weekend lalu 🌟 mimin hepi pol dapat kiriman foto-foto ini!

Semoga kita semua bisa selalu berbagi kebahagiaan di bulan Ramadan dan seterusnya yagesyaaa~ Buat yang masih menjalankan ibadah Puasa, semangat! 🌟 Ayo tabung pahala bareng sebanyak-banyaknya 😎 #MLBBGoldenMonth #MLBBBerbagiBerkah



Install Now

MLBB fosters goodwill by partnering with student leaders and community heroes for charitable activities tied to local culture, like Ramadan. This builds positive sentiment and highlights the game's everyday relevance.

## Authentic & Relatable Streamer Content



Popular local streamers and esports personalities bring authenticity to MLBB's video content. Their influence connects with younger players through humorous, shareable content rooted in actual gameplay.

## Real-World Fan Connections via Pop-Up Booths

Summer saya ang hatid ng MLBB Pop-Up Booth this Saturday, March 22! 🌟🌟

Susugod kami sa Sto. Tomas, Batangas upang mamigay ng ligaya at mga papremyo! Siguradong 3 points ang fun dito! 🎉 + 🎉 BATANGAS 🎉 Brgy. San Rafael, Sto. Tomas I 2PM

<https://maps.app.goo.gl/JzqcG353PgJ6XfRS9> See you, mga ka-MLBB! 🌟 #MLBBPopUp #MLBBBarangayan



Install Now

Offline events like MLBB's pop-up booth create tangible fan connections. These feature live games, giveaways, and meetups, generating memorable brand moments and word-of-mouth.

## Leveraging Regional Fandom with Nostalgic Collection Events

Mainit ba ang KOF collection mo? Ito na ang pagkakataon mong ipagmayabang yan! I-share ang screenshot ng iyong KOF collection at gamitin ang hashtag na #MLBBxKOF!

#MobileLegendsBangBang



Install Now

Tapping into regional fandom, MLBB's "King of Fighters" collaboration prompts players to showcase collections on social media. This boosts participation and taps into nostalgic pop culture recognized across Southeast Asia.



# Southeast Asia Publishers On the Global Stage

# Made in SEA: Publishers from the Region are the World's Top Producers of Mobile Games

The collective output of Southeast Asian mobile game publishers, amounting to over 5.8 billion installs in 2024, established company headquarters in the region as the world's leading source of game downloads.

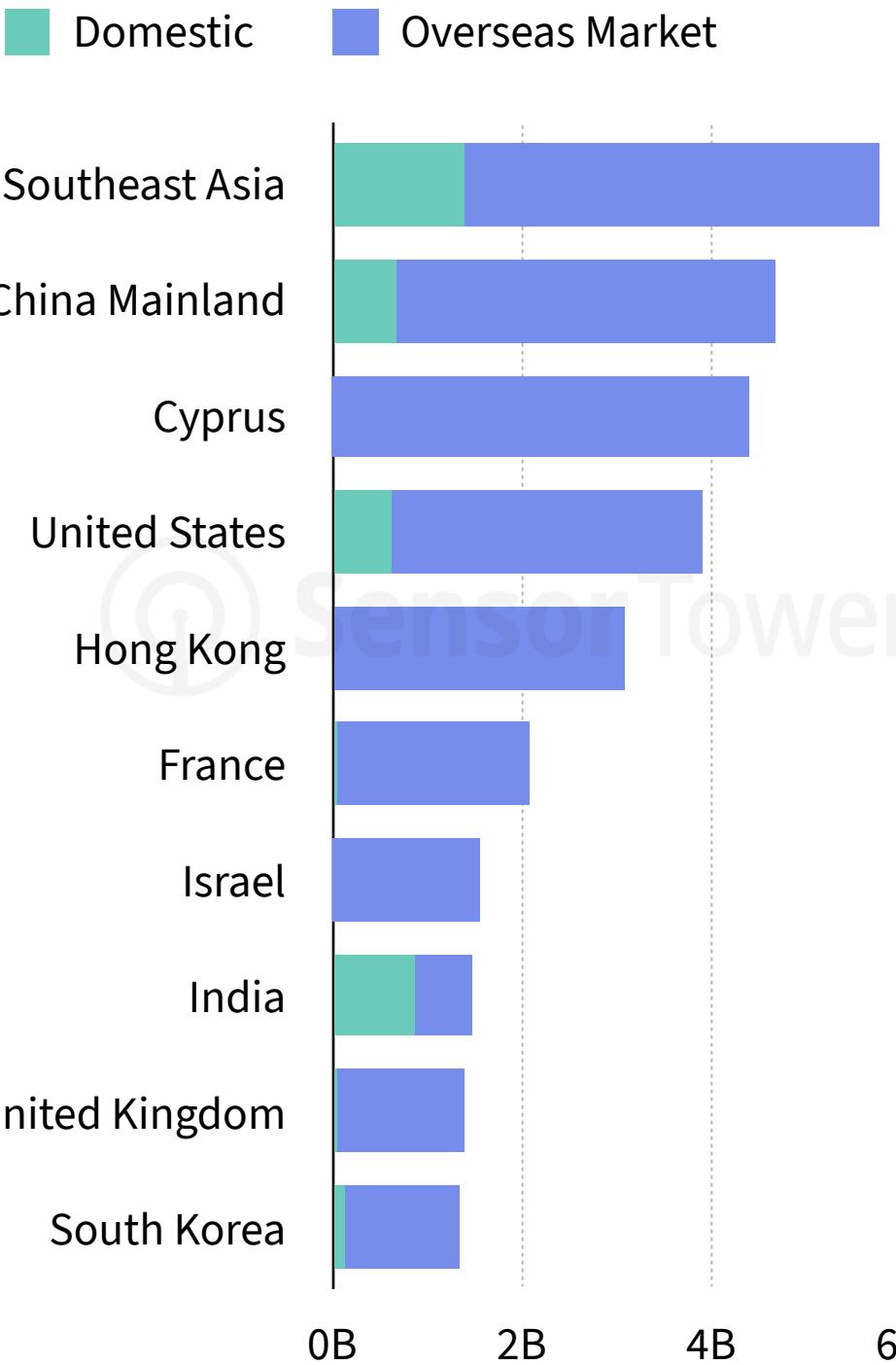
Vietnam's growing influence was particularly evident, with three of its publishers featuring among the global top 15 by downloads, underscoring the nation's rising prominence in global game publishing.

Significantly, the majority of these Southeast Asian game downloads stem from overseas markets, demonstrating the region's strong capability in creating export-ready and globally resonant mobile games.

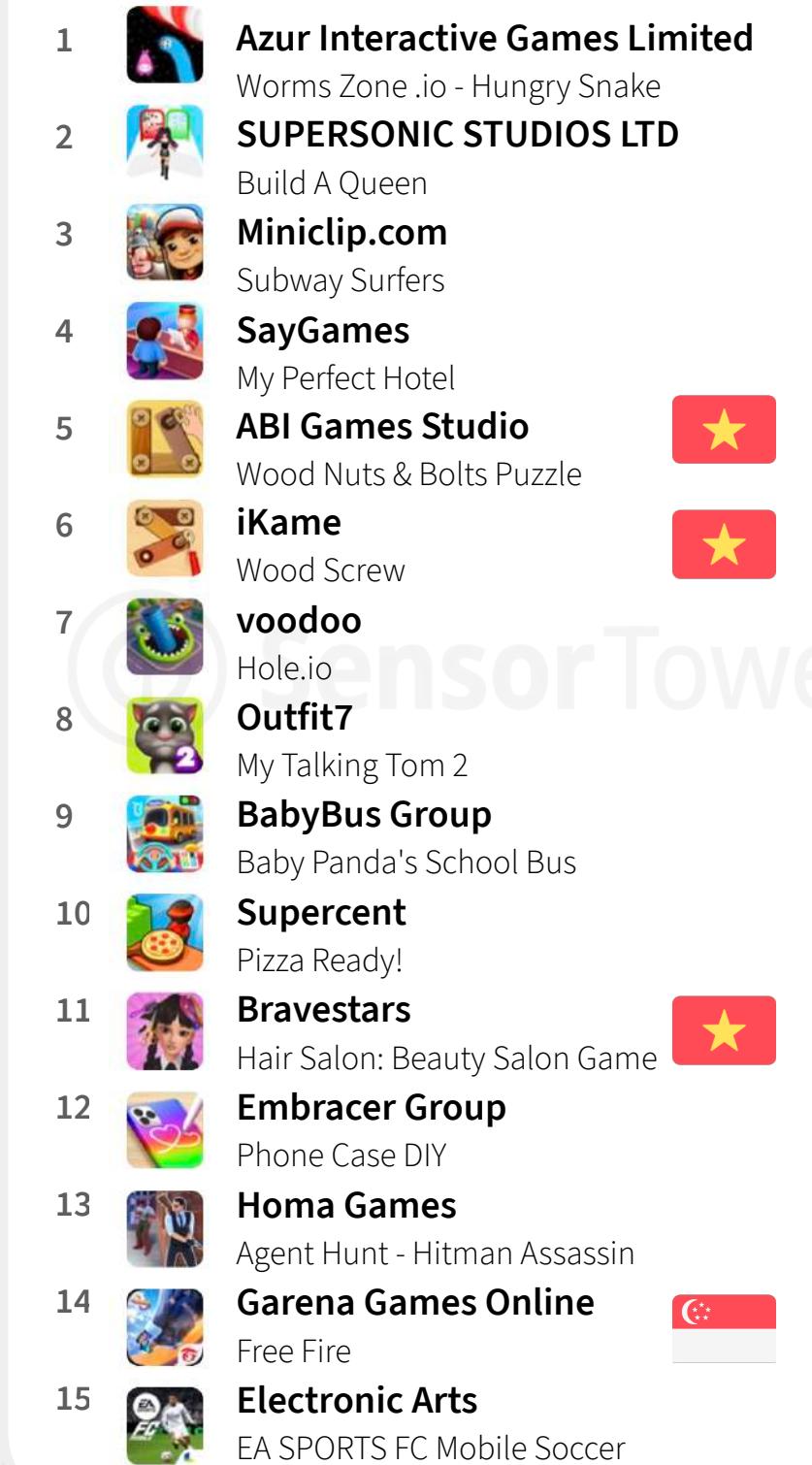
**Data Source:** Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.

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 **Top 10 Mobile Game Headquarters in 2024**  
By Worldwide Game Downloads



**2024 Top Game Publishers by Downloads**  
Worldwide, iOS & Google Play Combined



A table ranking the top 15 game publishers by worldwide downloads in 2024, combining iOS and Google Play data. Each row includes the rank, publisher name, game title, and the flag of the country where the publisher is located.

Rank	Publisher	Game	Flag
1	Azur Interactive Games Limited	Worms Zone.io - Hungry Snake	
2	SUPERSONIC STUDIOS LTD	Build A Queen	
3	Miniclip.com	Subway Surfers	
4	SayGames	My Perfect Hotel	
5	ABI Games Studio	Wood Nuts & Bolts Puzzle	
6	iKame	Wood Screw	
7	voodoo	Hole.io	
8	Outfit7	My Talking Tom 2	
9	BabyBus Group	Baby Panda's School Bus	
10	Supercent	Pizza Ready!	
11	Bravestars	Hair Salon: Beauty Salon Game	
12	Embracer Group	Phone Case DIY	
13	Homa Games	Agent Hunt - Hitman Assassin	
14	Garena Games Online	Free Fire	
15	Electronic Arts	EA SPORTS FC Mobile Soccer	

# Vietnam's Survival Game Surge: Local Publishers Dominate Q1 2025 Global Download Growth with Themed Hits

Vietnamese publishers rode a survival-theme wave in Q1 2025 global download growth.

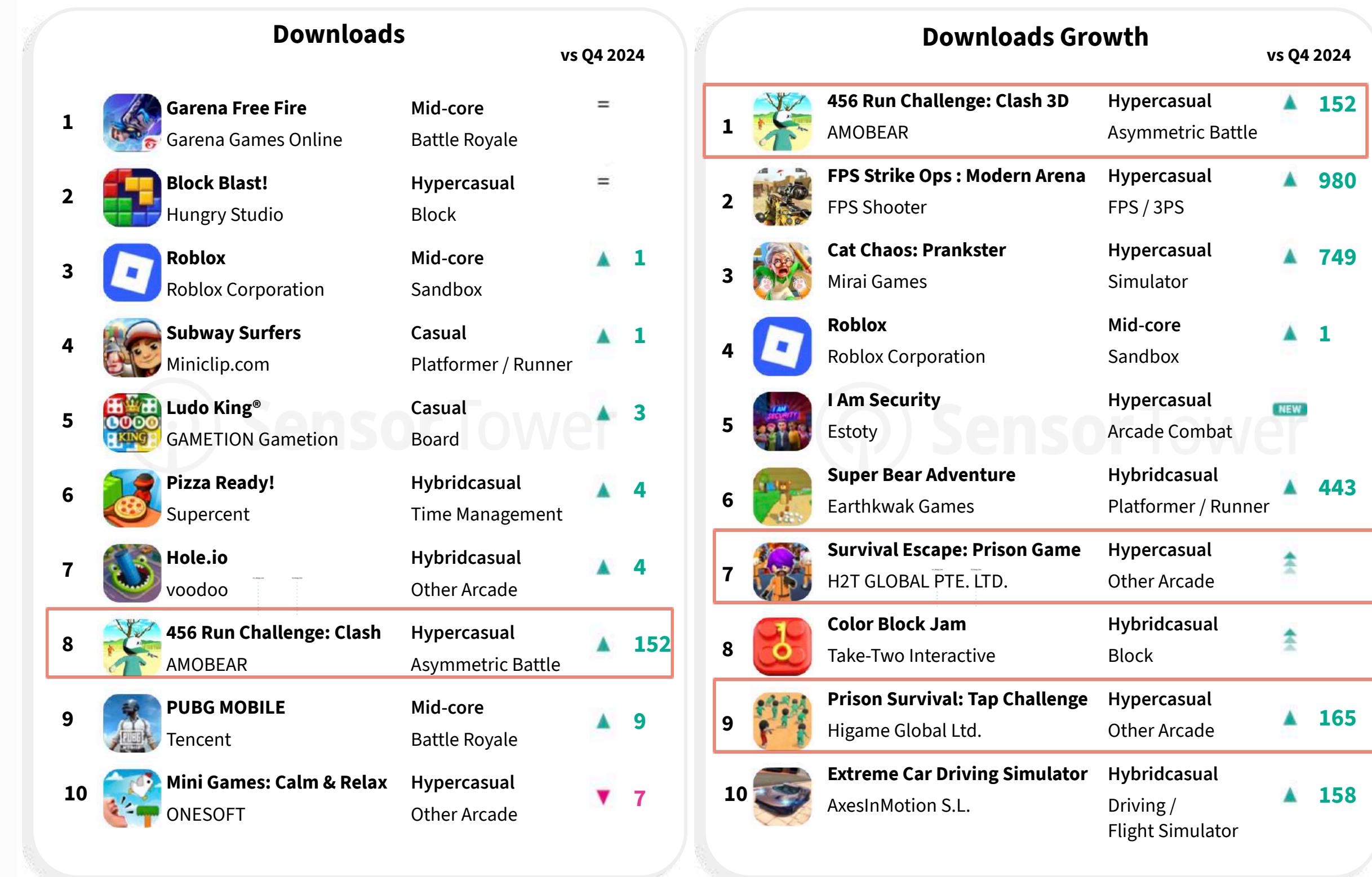
AMOBEAR's *456 Run Challenge*, H2T GLOBAL's *Survival Escape*, and Higame Global's *Prison Survival* surged up charts, showcasing Vietnam's adeptness at creating viral hits and capitalizing on trending gameplay for worldwide audiences.

**Data Source:** Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.

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Q1 2025 Top 10 Mobile Games Unified • Jan 1, 2025 - Mar 31, 2025





## Worldwide Cumulative Downloads of Survival - Themed Games by Vietnam Publishers

Unified • All Time as of May 19th 2025

# Vietnamese Game Publishers Thrive by Tapping into Popular Culture

Vietnamese developers have shown a keen ability to develop mobile games that resonate well with audiences.

By focusing on engaging gameplay and tapping into popular trends, they have successfully positioned their titles among top download charts.

Their strategic incorporation of cultural elements and themes relevant to current global trends enhances user engagement and monetization potential, reflecting their astute market understanding and creative capabilities in the mobile gaming industry.



 **456 Run Challenge: Clash 3D**  
AMOBEAR



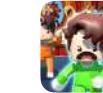
86 M



 **Prison Survival: Tap Challenge**  
Higame Global Ltd.



42 M

 **Survival Escape: Prison Game**  
H2T GLOBAL PTE. LTD.



20 M

**Data Source:** Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.

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# Global Impact of SEA Publishers: Diverse Genres and Local Studios Make Their Mark in Q1 2025

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Garena's Free Fire (Singapore) topped global Q1 2025 downloads, while iKame's Car Race (Vietnam) emerged as a leading racing title globally. These diverse genre successes underscore SEA's regional strength and growing capability to produce varied, globally appealing mobile hits, marking it as an increasingly influential global development hub.

## Top 10 Southeast HQ'd Game Publishers by Worldwide Downloads Unified • Jan 1, 2025 - Mar 31, 2025

Vietnam	Singapore	Malaysia	Thailand	Philippines	Indonesia
1 iKame Car Race	1 Garena Games Online Free Fire	1 QUEEN CITY Boba DIY Bubble Tea	1 GreenTomatoMedia Truth or Dare? Dirty game	1 Kooapps Snake.io - Fun Online Snake	1 Maleo Bus Simulator Indonesia
2 Bravestars Fruit Merge: Match Game	2 H2T GLOBAL PTE. LTD. Survival Escape Minigames	2 AppXplore Sdn Bhd Snaky Cat	2 Metin Yucel Fireboy and Watergirl: Online	2 Remy Games Zoo Dental Care Doctor Dentist	2 Social Game Lab TopTop: Games&Chat
3 HIGAME GLOBAL Prison Survival: Tap Challenge	3 Guru Puzzle Game Solitaire - Card Games Classic	3 Sia Ding Shen TCG Card Shop Tycoon Simulator	3 Jibi Cat Jibi Land : Princess Castle	3 Big Giant Games Prison Escape Puzzle Adventure	3 IDBS Studio Truck Simulator X -Multiplayer
4 ABI Games Studio Galaxy Attack: Space Shooter	4 SkySoft Studio Avatar Life World: My Story	4 Avari Games Studio Fire Grand Battle Royale Games	4 Happy Games Co., Ltd. Fish Royale - Underwater Arena	4 GAVIN VENTURES, INC. OKGames - JILI	4 Noctua Games Hamster Jump: Cake Tower!
5 ONESOFT Goods Puzzle: Sort Challenge	5 Flyyes, Inc. ColorBlock : Combo Blast	5 SAN Susun Kata - TTS Indonesia	5 GAMEINDY Dummy & Toon Poker	5 DigiWards Lovely Pet	5 CodeXplore Ojol The Game
6 XGame Global Town Building Life Simulator	6 Casual Joy Games Happy Merge Home	6 TREASURETECH CO PTE. LTD. Fun Of Vegas - Casino Slots	6 Playpark Company Limited Granado Espada M	6 AB Leisure Exponent Inc. BingoPlus - Bingo Games Online	6 LemauDev Simulator Perang Sarung 3D
7 Think Different FC. Jelly Master: Mukbang ASMR	7 IDLERO Bad Cat: Life Simulator	7 Play Planet Game Time Big Bang	7 Kiragames Co., Ltd. Unblock Me Premium	7 GOSU ONLINE CORPORATION Nine Yin Divine Scripture 2D	7 VerlyGameDev Herex Simulator Indonesia
8 AMOBEAR TECHNOLOGY GROUP 456 Run Challenge: Clash 3D	8 GoKids! publishing Truck games - build a house	8 Zempot Malaysia Winjoy Online	8 Volevi Chayen - word guess party	8 CLOVER-FI Games Window Garden - Lofi Idle Game	8 Angindev INDOCRAFT 5 : Nuansa Santri
9 Zendios Real Car Driving Midnight Club	9 Flyfox Games Water Sort!	9 Lifebelt Games Pte. Ltd. Max Air Motocross	9 LinDuo LinDuo: Learn English	9 Hype Up Game Studio Perya Color Game	9 Gamerz Hive Offroad Jeep Game 4x4 Driving
10 Amanotes Pte. Ltd. Magic Tiles 3	10 BRAINWORKS PUBLISHING PTE. LTD. NumMatch: Logic Puzzle	10 Khuro Games Sopir Travel Simulator ID	10 Funplay World Domino Gaple Online	10 Yangyang Mobile The Letter - Horror Novel Game	10 ESproject ES Truck Simulator ID

# Singapore's Garena Leads Diverse Pack of High-Earning Southeast Asian Game Publishers

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Publishers from Vietnam (e.g., ONESOFT with puzzle games) and Malaysia (TREASURETECH with casino titles) also demonstrated monetization capabilities across varied game genres. This highlights the region's expanding skill in not just developing popular games, but in successfully monetizing diverse gaming experiences on a global scale.

## Top 10 Southeast HQ'd Game Publishers by Worldwide Revenue Unified • Jan 1, 2025 - Mar 31, 2025

Vietnam		Singapore		Malaysia		Thailand		Philippines		Indonesia	
1	ONESOFT Goods Puzzle: Sort Challenge	1	Garena Games Online Free Fire	1	Play Planet Game Trading Legend	1	GreenTomatoMedia Party Roulette: Group games	1	Kooapps Piano Tiles 2™: Fun Piano Game	1	Social Game Lab TopTop: Games&Chat
2	VNG CORPORATION Roblox	2	Happibits Game Merge Cooking®	2	TREASURETECH CO PTE. LTD. Fun Of Vegas - Casino Slots	2	Playpark Company Limited Granado Espada M	2	GOSU ONLINE CORPORATION Silkroad Origin Mobile	2	Mondraw Limited Pokerrrr 2: Texas Holdem Poker
3	iKame Screw Out	3	Mytona Seekers Notes: Hidden Objects	3	Sia Ding Shen TCG Card Shop Tycoon Simulator	3	GAMEINDY Dummy & Toon Poker	3	Anino Pte. Ltd. Double Win Vegas Casino Slots	3	Noctua Games Crazy Ones
4	ABI Games Studio 1945 Air Force: Airplane Games	4	SKYWORK AI Pte.Ltd. The Legend of Neverland	4	7th Beat Games A Dance of Fire and Ice	4	Electronics Extreme Limited Audition Dance & Date	4	Remy Games Zoo Dental Care Doctor Dentist	4	Nick Carney Cracking the Cryptic
5	Amanotes Pte. Ltd. Magic Tiles 3	5	MAX GAME PTE.LTD. Mini Heroes: Magic Throne	5	Kurechii Postknight 2	5	shan xu Horror Legend: ໂຄນີ້	5	Big Giant Games Prison Escape Puzzle Adventure	5	INDOPLAY Mango Capsa Susun
6	LIHUHU PTE. LTD. Match Triple 3D: Matching Tile	6	KINGS FORTUNE PTE.LTD. Happy Match Cafe™	6	Yee Ling Lee Bomb Me	6	BEYOND GAMES Wonderland M	6	EOL Dev EOL NextGen	6	Megaxus Infotech AyoDance Mobile
7	ADONE PTE. LTD. Screw It Out!	7	Casual Joy Games Happy Merge Home	7	AppXplore Sdn Bhd Crab War	7	Digitopolis Co., Ltd. Dummy Pueak	7	Monstronauts Inc. Potion Punch'2	7	Ikan Asin Production Citampi Stories: Love and Life
8	Bravestars Fruit Merge: Match Game	8	VividJoanGames Bingo Wild - Fun Animal Bingo	8	Zempot Malaysia Winjoy Online	8	MiracleSongStudio Isekai : Sky Fantasy	8	CLOVER-FI Games Window Garden - Lofi Idle Game	8	Akhir Pekan Studio Laundry Store Simulator
9	VIETNAM INTERACTIVE TELEVISION JSC Thần Ma Loạn Vũ - Vplay	9	STONE3 PTE. LTD. Nova: Space Armada	9	OPNeon Games TCG Card Shop Tycoon 2	9	Prakasit Sornnam Dummy Hero	9	Ranida Labs Vita Fighters	9	IRFAN DANI S.Pd Revelation Legends
10	Nam Ngo Cake Sort - Color Puzzle Game	10	WEJOY PTE. LTD. Jackaroo King - Original	10	Lifebelt Games Pte. Ltd. Gun Builder ELITE 2	10	Index Asia Ltd Yume 100	10	Yangyang Mobile Love Esquire	10	Deddy Dev True Three Kingdoms: Five Tiger Generals

# Conclusion

1

## Southeast Asia is the Growth Engine for Mobile Gaming, with Indonesia at the Core

Southeast Asia continues to be one of the **largest and most engaged mobile gaming regions globally**. Countries like **Indonesia, the Philippines, and Vietnam** consistently rank among the top markets in both downloads and revenue. High mobile penetration, a young gaming population, and a strong culture of social play make SEA a critical region for publishers looking to scale both user base and monetization over time.

2

## Genre Preferences Vary Widely, but Strategy, Simulation, and Shooters Stand Out

Top-performing subgenres differ slightly by market, but **Simulation, Strategy (especially 4X and MOBA), and Shooters** emerge as common favorites across the region. Puzzle games also continue to gain traction, especially those with low barriers to entry and viral appeal (e.g. *Block Blast!*). Subgenre performance also reflects shifts in local player behavior—such as stronger sandbox demand in Vietnam, spending in sports in Thailand, or a rise in shooter monetization in the Philippines.

3

## Hyper-Localization Fuels Success Across Markets

*Mobile Legends: Bang Bang*'s regional dominance is underpinned by its **deep localization strategy**. Whether it's charity-led Ramadan campaigns in Indonesia, pop-up booths in the Philippines, or influencer activations in Vietnam, MLBB builds cultural resonance through community involvement and local flavor. **IP collaborations** with franchises like *King of Fighters* further strengthen appeal by tapping into shared fandoms in Asia. These efforts show that localization goes far beyond language—it's about timing, relevance, and community connection.

4

## SEA Publishers: Diverse Country HQs Fueling Global Impact

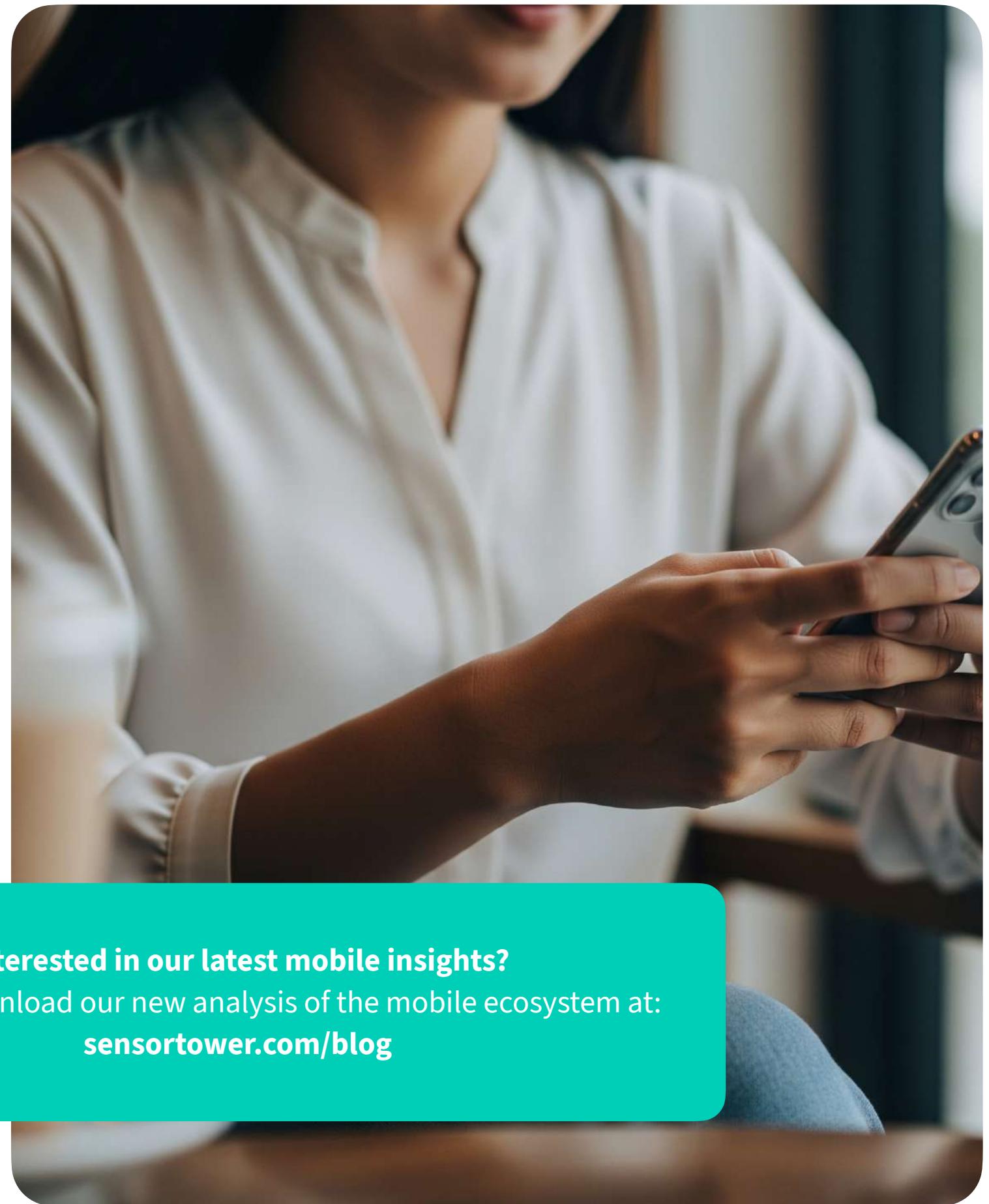
SEA publishers, especially from **Singapore** and **Vietnam**, show global impact, leading in downloads and establishing SEA as a key development hub. Q1 2025 highlights include *Garena Free Fire* (Singapore) topping global downloads and *IKame's Car Race* (Vietnam) gaining significant global traction. Vietnamese publishers dominated Q1 2025 global download growth with viral **survival-themed** hits, leveraging trending gameplay. These varied, appealing, and innovative global hits from diverse SEA HQs cement the region's rising influence in the worldwide gaming market.

# Sensor Tower

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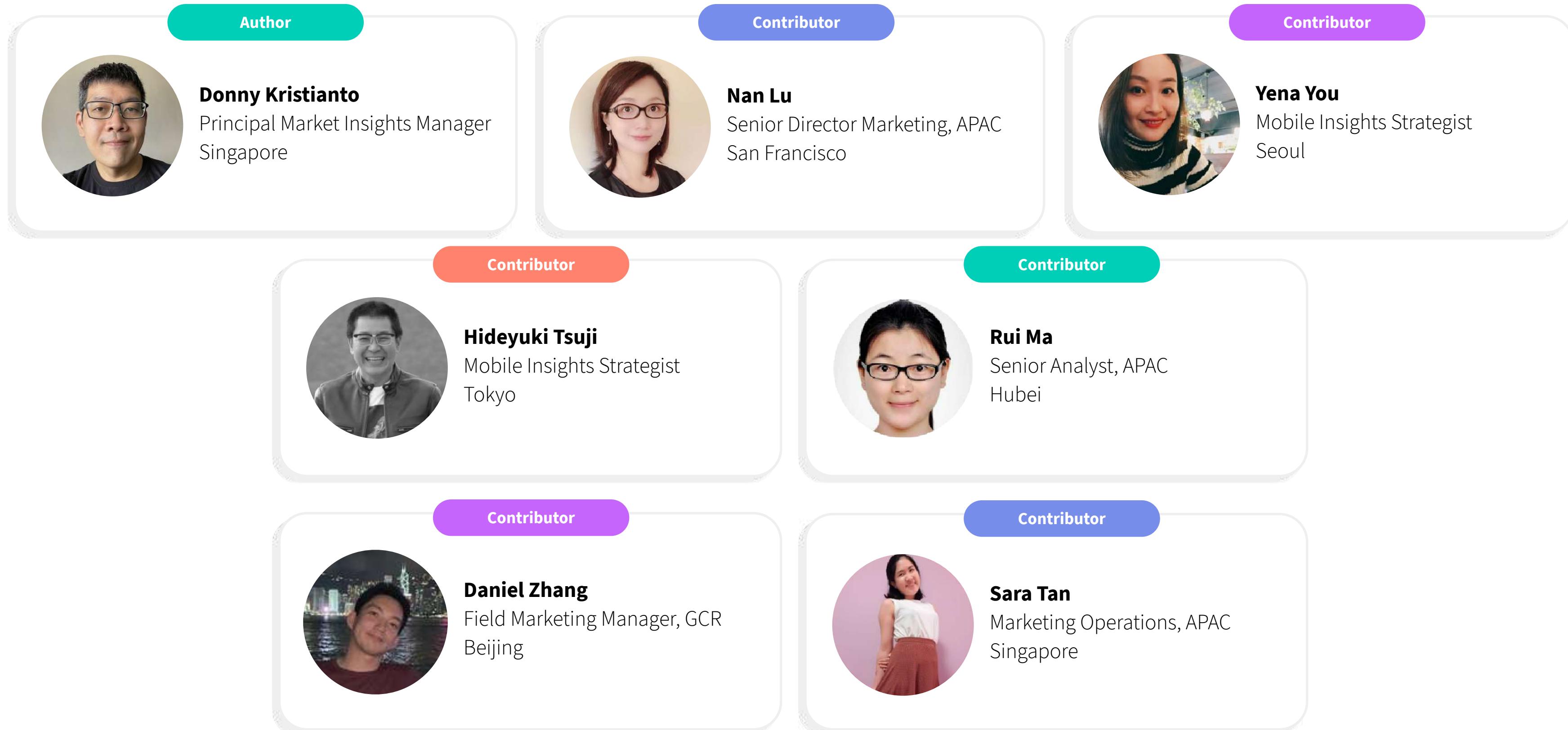


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### Los Angeles

3840 Watseka Ave  
Culver City,  
CA 90232  
United States



### New York City

WeWork  
33 Irving Place  
9th Floor,  
#9031 New York,  
NY 10023  
United States



### San Francisco

44 Montgomery St  
San Francisco,  
CA 94104  
United States



### Vancouver

555 Burrard St  
Vancouver  
BC V7X 1M9  
Canada



### London

3rd Floor,  
Hend House  
233 Shaftesbury Ave  
London  
WC2H 8EE  
United Kingdom



### Seoul

909-ho, 22,  
Teheran-ro 7-gil,  
Gangnam-gu,  
Seoul, South Korea,  
06130



### Singapore

WeWork  
9 Battery Road,  
Level 6  
Singapore 049910  
Singapore



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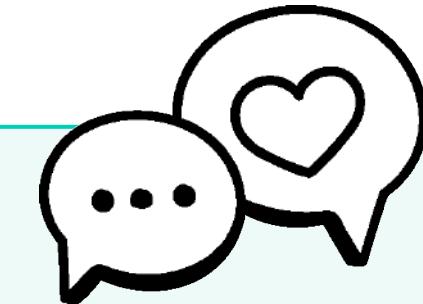
Guanghua Ocean  
International Center,  
10 Jintong Rd (W.),  
Tower AB, 7/F,  
Chaoyang, Beijing,  
100020 China



### Tokyo

Kanda First  
Building,  
45-1 Kandakonyacho,  
Chiyoda-ku,  
Tokyo 101-0035  
Japan

**Contact Info:**  
[sensortower.com](http://sensortower.com)  
[sales@sensortower.com](mailto:sales@sensortower.com)



### Contact Us

Press : [press-apac@sensortower.com](mailto:press-apac@sensortower.com)  
Sales: [sales@sensortower.com](mailto:sales@sensortower.com)

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