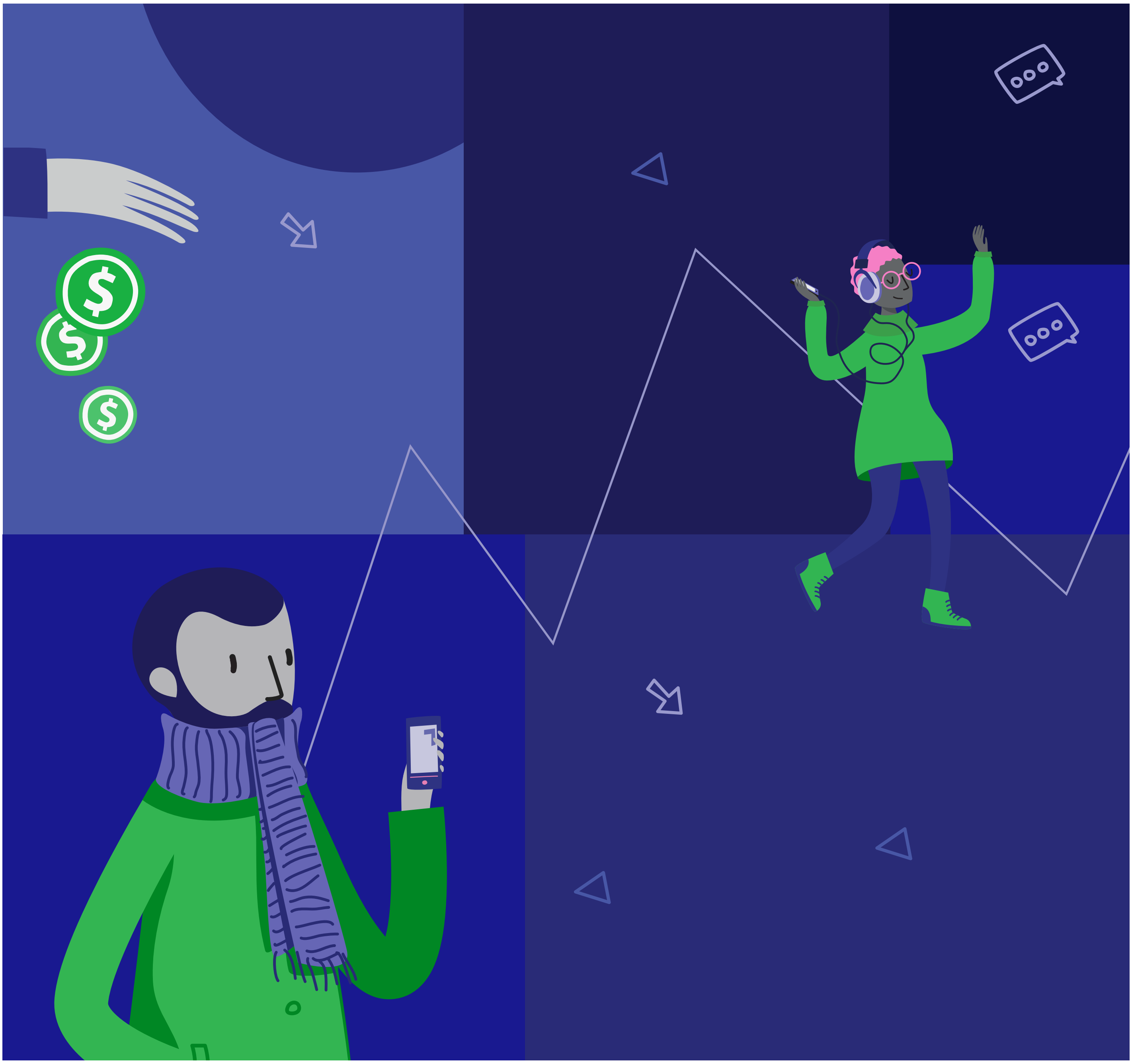
Free Version | 2021

Global Mobile Market Report

Key Trends | Market Sizing & Forecasts
Special Focus Topic | Rankings



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Foreword

Newzoo's 2021 Global Mobile Market Report

We and our partner Apptopia are proud to present the 2021 edition of our Global Mobile Market Report, which launches during a crossroads for the mobile market and the games market within it.

As always, the mobile (games) market is bigger, more lucrative, and more diverse than ever before. The number of smartphone users and active smartphones is rising, mobile game revenues are up, and 5G is, at last, starting to hit its stride. However, the market has been disrupted, and there are even more changes on the horizon.

While mobile has always been a fast-moving space, the past year has shaken its foundations. Mobile gaming builds much of its success on data-driven insight, enabled through smart tracking and targeting of players. **Stringent privacy-based policies** from the most dominant mobile platforms—Apple and Google—as well as regulators have created new challenges for developers, publishers, ad tech, and marketers, impacting almost all aspects of the mobile ecosystem. **The lawsuit between Apple and Epic Games** has also created huge uncertainties in the mobile ecosystem. While it is still too early to judge the lasting impact of the U.S. court's injunction on Apple for its anti-steering App Store policies, it sets a precedent for in-app payments that can open up the mobile app economy.

Perhaps the most influential change is Apple's App Tracking Transparency, requiring users to manually opt in for companies to track their iOS devices. Apple's—and to a lesser extent, Google's—new stance on privacy has rippled across the market, shifting the face of mobile user acquisition and monetization while putting more power in the hands of platforms such as Apple's and Google's own.

To retain some of the tracking ability they had, mobile companies are turning into content fortresses, and publishers are doubling down on internal ad networks. The latter two developments are resulting in more merger-and-acquisition activity and consolidation across the industry.

In terms of game design, these new challenges have accelerated strategies like **hybrid monetization** and IP-based games.

Understanding the future impact of these changes—and how consumers might react to them—means exploring mobile gamers' motivations, attitudes around in-game advertisements, and IP preferences. We went straight to source to spotlight **consumer sentiment** across these topics, surveying 5,400 mobile gamers across China, the United States, Germany, and Japan.

As you will discover, all signs point to mobile consumers accepting many of the new strategies from platforms, publishers, and ad tech firms. These companies must continue to adapt to these new changes and the challenges they present. Yet, the market boasts some of the biggest, brightest, and most innovative minds in tech and gaming, and we already see companies beginning to thrive in this new age of mobile.

We are confident that these successes will continue into 2022 and beyond.

Tianyi Gu
Market Lead Telecom
& Mobile Services

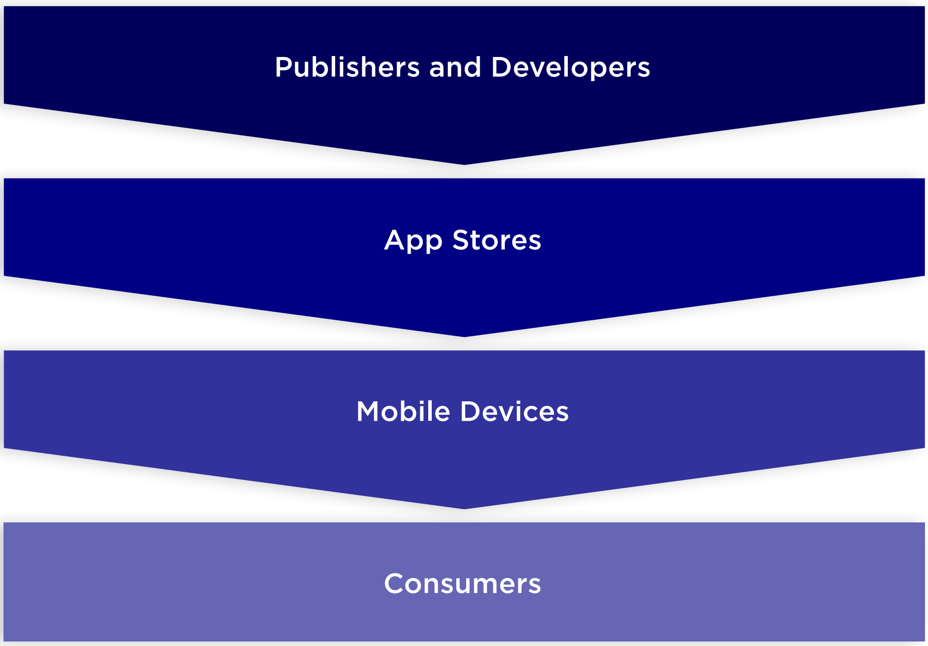
01. Introduction

Scope of the Report

Mobile Hardware and Mobile Games

Consumers are at the heart of the games business. Key players in the value chain for delivering mobile game content to end-consumers include publishers/developers, app stores, and mobile devices. In this report, we classify the key players in the value chain into two major markets: the mobile hardware market and the mobile games market. In the mobile hardware market, we look at smartphone users, active smartphones, and 5G-ready smartphones. In the mobile games market, we focus on game revenues generated by direct consumer spending (excluding ad revenues).

Mobile Games Value Chain



02. Methodology & Terminology

Methodology

Sizing the Market with A Variety of Data

Newzoo aims to provide its community with the most insightful knowledge of the mobile market by combing intelligence from our market forecasts and tracking service. By synthesizing many data points, we provide estimates on a global, regional, and individual country/market level. Below, we describe our approach in more detail to help our community understand what underpins our models, facilitating comparisons with other data sources.

At the highest level, Newzoo focuses on the mobile hardware market and the mobile games market. This report combines data from our market forecasts (smartphone user, 5G-ready smartphone, and mobile game revenue forecasts) and tracking service (smartphone usage tracking). These models are closely linked and form the basis of the most important takeaways in the report. We re-evaluate all our models regularly, ensuring up-to-date market information for our community.

Smartphone User Forecast

A key part of the report is sizing the smartphone market in terms of active users rather than units shipped. We focus on how many consumers use a smartphone on at least a monthly basis. To calculate this, we have developed a detailed model using several socio-economic development indicators per market from data sources including UN, ITU, and government reports. Key indicators are a country's total population, online population, urbanization rates, demographic makeup, and accessibility to wireless networks.

5G-Ready Smartphone Forecast

Newzoo's 5G-ready smartphone forecast model is built on our Mobile Device Data (see next page), using a bottom-up approach. We benchmark the market penetration of a new generation of smartphones over years at a country level by analyzing historical data since mid-2016. The first two years (2019 and 2020) of the new generation forecast is based on actual data from our Mobile Device Data. Macroeconomic, census data, and local 5G development analysis enable us to reach an estimate of the share of 5G-ready smartphones among all new devices sold in all the years we forecast. The combination of all these factors yields a share of devices that are 5G-ready for every market and every year. Multiplying this share with the number of devices per country and per year from the abovementioned smartphone user forecast model generates an absolute number of 5G-ready smartphones in each market. This is then aggregated per region and summed for the global total.

Mobile Device Data

Newzoo's Mobile Device Data service is based on a combination of various data sources. We collect and process global monthly device usage data from strategic partners—Pushwoosh and TalkingData, giving us aggregated data on the number of actively used devices and models around the world, enriched with more detailed information, such as chipset, screen size, or memory size per model. In total, the monthly sample consists of more than 400 million devices. The results are extrapolated to total smartphones and tablets actively used in each market and provide key insights into the MAU of brands, models, and spec details (e.g., type of device, battery sizes, screen resolutions, and many more characteristics). We focus on the two dominant mobile operating systems, iOS and Android, and cover 100 markets in total. Together, these 100 markets cover 98.5% of smartphone users in the world.

Mobile Game Revenue Forecast

Newzoo's total mobile game revenue data comes from our predictive global games market model, which uses a top-down approach to market sizing. We incorporate macroeconomic and census data from the IMF and UN, such as household income and GDP per capita. Further, we use transactional and app store revenue data from our data partners Airnow Data and Apptopia, our primary consumer research, detailed financial information reported by more than 100 public companies, and third-party research.

We define revenues as the amount the industry generates in consumer spending on mobile games through in-app purchases, subscriptions, or paid installs from apps that are categorized as games by app stores. Our revenue numbers exclude hardware sales, taxes, advertising revenues earned in and around games, business-to-business services, and the traditionally regulated online gambling and betting industry (e.g., BWIN and William Hill).

In terms of countries and regions, we define the market size as the amount companies generate from consumers in that specific territory, as opposed to the amount companies based in a particular territory generate worldwide.

Total mobile game revenues are broken down into revenues from the Apple App Store, Google Play Store, and an aggregate of all available third-party app stores per region and market. To break down mobile game revenues by app store, we use multiple data inputs with a bottom-up approach.

Firstly, our Mobile Device Data serves as our most important input from which we split individual markets by operating systems (iOS vs. Android). Secondly, based on Newzoo's primary consumer research and mobile metrics data from our partners Airnow Data and Apptopia, we calculate the spending multiplier of iOS gamers compared to Android gamers on a country/market level. By combining the operating system share and spending multiplier, we break down mobile game revenues by iOS and Android for individual markets. Thirdly, Android mobile game revenues are further split between Google Play and third-party app stores based on our consumer research where we look at third-party Android store usage in 33 key markets and mobile gamers' spending behavior across various app stores. Examples of third-party app stores include Amazon Appstore, Samsung Galaxy Store, Garena, and, most importantly, all existing Android app stores in China where Google Play is not available.

Global Mobile Market Model

Population & Economic Census Data
Projecting organic growth on a local and global scale

Tracking Data
Device usage, app downloads, and revenues

Primary Consumer Research in Key Markets
Understanding playing and paying behavior

Global Financial Company Analysis
Mobile game revenues of public and non-public companies

Third-Party Research
Reported on a local and global scale

Mobile Hardware

Smartphone User and 5G-Ready Smartphone Forecasts

Market Forecasts

Mobile Games

Mobile Game Revenue Forecast

Terminology

Definition of Main Terms

Android emulator: A tool that creates virtual Android devices (with software and hardware) on a user's computer.

5G-ready smartphone: A smartphone that can connect to 5G networks via an embedded 5G modem. When 5G networks are not available, the device will be able to switch to previous generations of networks, including 4G LTE, 3G, and below.

5G penetration: The share of 5G-ready smartphones among all active smartphones. Active smartphone: A smartphone used at least once per month.

Apple App Store revenues: Mobile game revenues generated from apps downloaded from Apple's App Store.

Augmented reality: A technology that supplements the users' real-life views with computer-generated sensory input as images or sounds.

Cloud gaming: The ability to play a game on any device without owning the physical hardware required to process it or needing a local copy of the game itself.

Compound annual growth rate (CAGR): The constant growth rate over a period of years. In this report, all CAGRs are based on the years 2019-2024 except those for active 5G-ready smartphones. CAGRs for active 5G-ready smartphones are based on the years 2020-2024.

Cross-play: A functionality that allows players on different platforms to play together, regardless of the input method used.

Device brand: The manufacturer or brand name of the device as indicated by the device software.

Esports: Competitive gaming at a professional level and in an organized format (a tournament or league) with a specific goal (i.e., winning a champion title or prize money) and a clear distinction between players and teams competing against each other.

Game enthusiasts: All people who engage with gaming content through playing, viewing, and/or owning.

Gamer personas: A new way of segmenting game enthusiasts across playing, viewing, and owning behavior. Gamer personas include the Ultimate Gamer, the All-Round Enthusiast, the Bargain Buyer, the Community Gamer, the Hardware Enthusiast, the Popcorn Gamer, the Backseat Viewer, the Time Filler, and the Lapsed Gamer. Please refer **here** to find the definition of each persona.

Google Play revenues: Mobile game revenues generated from apps downloaded from Google Play.

High-fidelity mobile games: Mobile games that feature advanced graphics and/or complex mechanics and gameplay, including "lite" versions of complex mobile games, such as PUBG Mobile Lite and Garena Free Fire. Typically, we classify the following types of games as high-fidelity: MMO, MOBA, 3D action RPG, 3D racing, 3D shooter/ battle royale, and 3D 4X strategy games.

Metaverse: A virtual social environment where people can create and engage in shared experiences.

Mobile game: A game played on a smartphone or a tablet.

Mobile game payer: An individual who spent money on at least one mobile game in the past six months.

Mobile game player or mobile gamer: An individual who played at least one mobile game in the past six months.

Mobile game revenues: Revenues generated through in-app purchases, subscriptions, or paid installs from apps categorized as games by app stores, excluding hardware sales, tax, business-to-business services, advertising, and online gambling and betting revenues.

Online population: People within a country or region who have access to the internet via a computer or mobile device.

Peripherals: Gaming-related hardware products that are used for gaming, such as gaming mice, keyboards, headsets, controllers, or monitors.

Smartphone: A device with a screen size under seven inches and an advanced operating system.

Smartphone penetration: The share of the total population that uses a smartphone.

Smartphone user: An individual who possesses his/her own smartphone and uses it at least once per month.

Tablet: A device with a screen size of seven inches or larger and an advanced operating system.

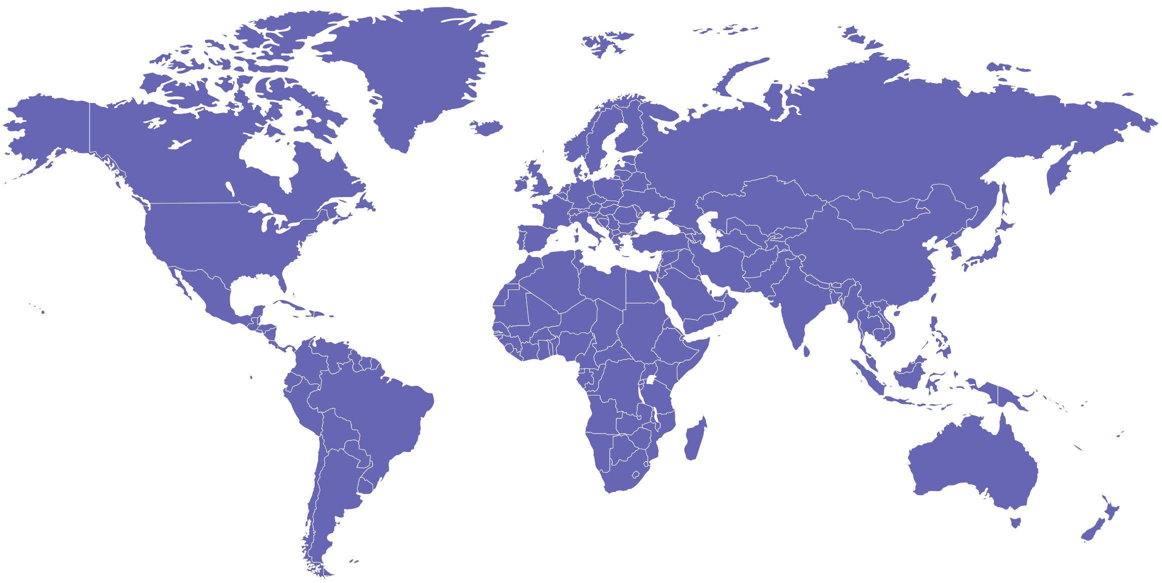
Third-party store revenues: Mobile game revenues generated from apps downloaded from third-party Android app stores such as Amazon Appstore, Samsung Galaxy Store, Garena, and, most importantly, all existing Android app stores in China where Google Play is not available.

Virtual reality: The computer-generated simulation of a three-dimensional image or environment that can be interacted with in a seemingly real or physical way by a person using special electronic equipment, such as a headset with a screen inside or gloves fitted with sensors.

03. The Global Mobile Market

These estimates are from September 2021. We review these quarterly and update them if needed here: newzoo.com/key-numbers.

Global



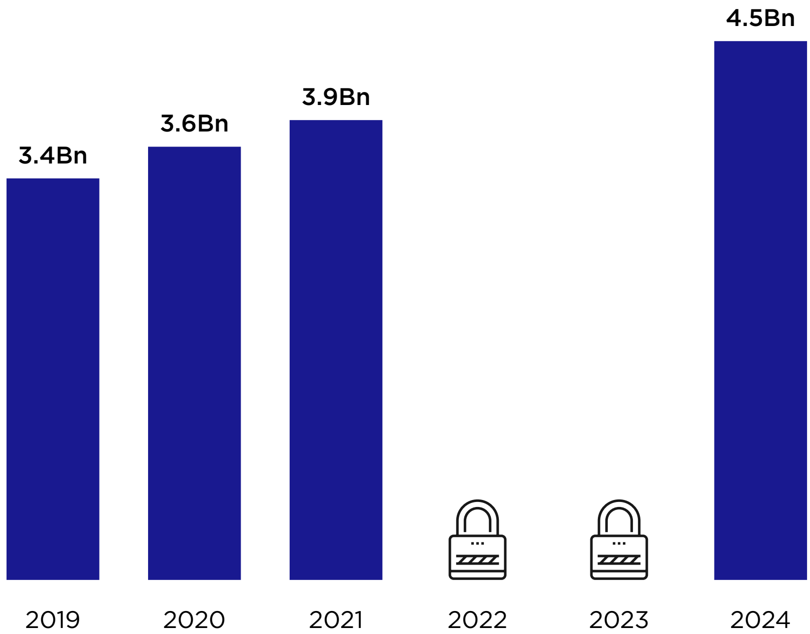
2021	
Population	7,874.8M
Online Population	4,778.6M
Smartphone Users	3,856.7M
Active Smartphones	4,569.8M
5G-Ready Smartphones	703.5M
Mobile Game Revenues	$90.7Bn

Smartphone User Forecast

The total number of smartphone users will reach 3.9 billion worldwide in 2021, representing a modest year-on-year growth of +6.1%. Asia-Pacific will be the largest region in terms of smartphone users, accounting for more than half (56.2%) of the global total. The global number of smartphone users will grow at a +6.1% CAGR (2019-2024) to reach 4.5 billion in 2024.

Smartphone Users

Global | 2019-2024



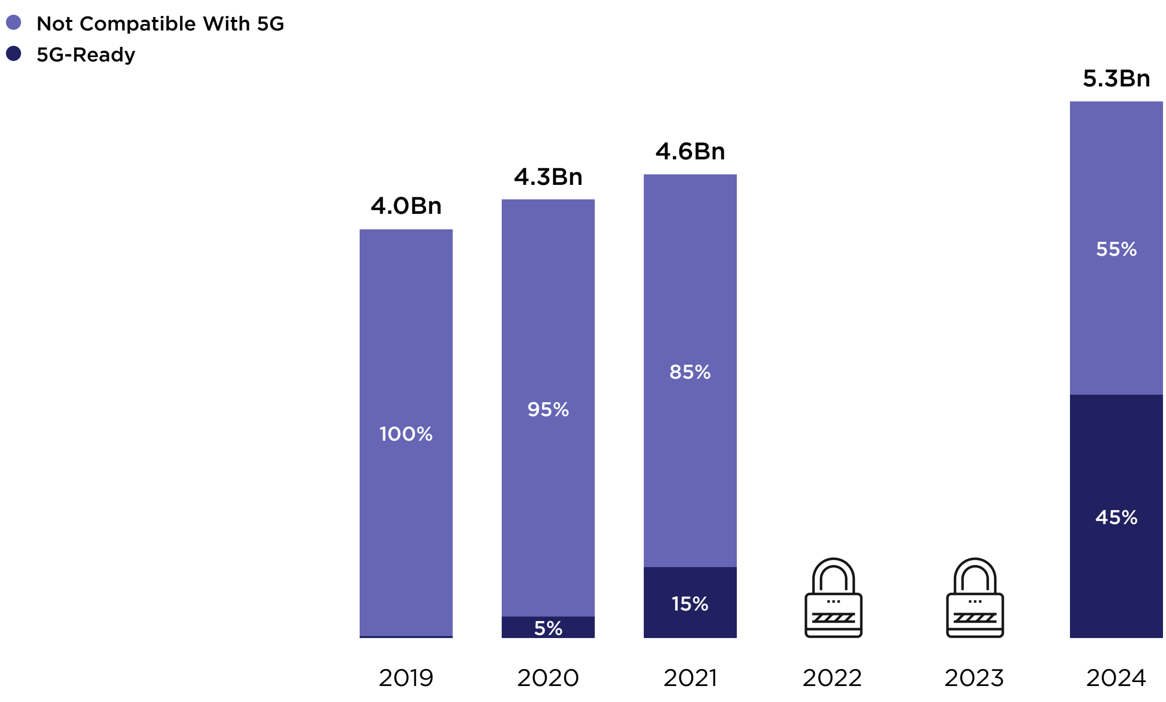
Find the complete smartphone user forecast per market in the full report.

Active Smartphones and 5G-Ready Smartphones

In 2021, the global number of active smartphones will reach 4.6 billion (+5.7% year on year), among which 15.4%, or 703.5 million, are 5G-ready. This represents an impressive year-on-year growth of +230.9% in the number of active 5G-ready smartphones worldwide. By 2024, there will be 2.4 billion active 5G-ready smartphones worldwide, accounting for 45.4% of total active smartphones. The global number of 5G-ready smartphones will grow at a strong four-year CAGR (2020-2024) of +83.4%.

Active Smartphones & 5G-Ready Smartphones

Global | 2019-2024



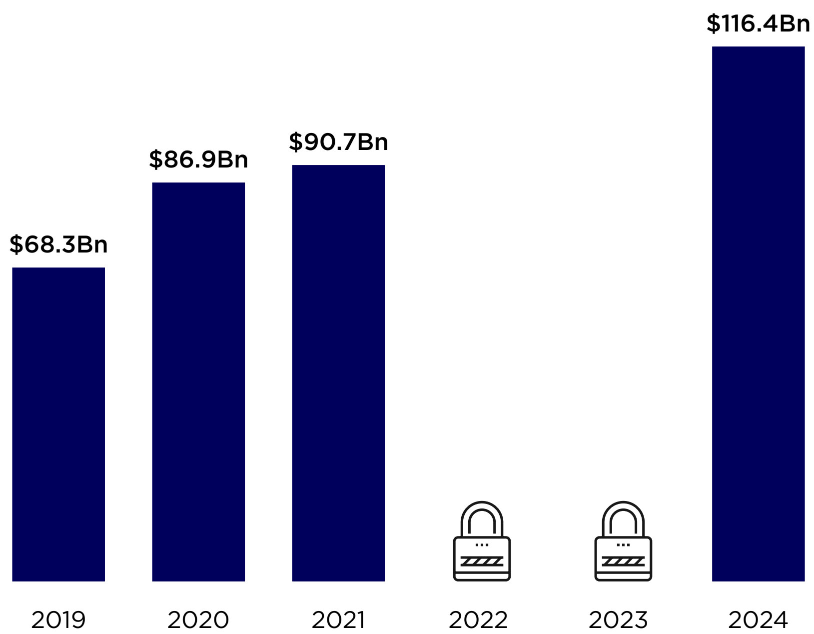
Find the complete active & 5G-ready smartphone forecast in the full report.

Mobile Game Revenue Forecast

In 2021's $90.7-billion mobile games market (direct consumer spending only, excluding ad revenues), 45.3%, or $41.1 billion, will come from the App Store. Google Play will produce $28.2 billion, or 31.1% of the global total. Third-party app stores will contribute to the remaining 23.5% ($21.3 billion). The global mobile games market will grow with a +11.2% CAGR (2019-2024) to reach $116.4 billion in 2024.

Mobile Game Revenues

Global | 2019-2024



Find the complete mobile game revenue forecast per market in the full report.

04. Rankings

Top 100 Markets 2021

By Smartphone Users

The table below shows key data points, including population, online population, smartphone users, active smartphones, and smartphone penetration, for the top 100 countries/markets worldwide by number of smartphone users in 2021.

Market/Region	Global Rank	Population	Online Population	Smartphone Users	Active Smartphones	Smartphone Penetration
China	1	1,444.2M	976.7M	953.5M	1,145.2M	66.0%
India	2	1,393.4M	693.0M	492.8M	596.5M	35.4%
United States	3	332.9M	287.8M	273.8M	312.3M	82.2%
Indonesia	4	276.4M	184.9M	170.4M	206.3M	61.7%
Brazil	5	214.0M	160.1M	118.5M	138.9M	55.4%
Russia	6	145.9M	122.6M	102.2M	116.9M	70.1%
Japan	7	126.1M	115.4M	83.0M	94.1M	65.9%
Mexico	8	130.3M	98.1M	74.8M	87.7M	57.4%
Vietnam	9	98.2M	75.2M	66.9M	81.0M	68.2%
Germany	10	83.9M	76.6M	66.2M	75.5M	78.8%

Find the complete ranking in the full report.

Top 100 Markets 2021

By Mobile Game Revenues

The table below shows key data points, including total mobile game revenues, App Store revenues, Google Play revenues, and third-party store revenues, for the top 100 countries/markets worldwide by mobile game revenues in 2021.

Market/Region	Global Rank	Mobile Game Revenues	App Store Revenues	Google Play Revenues	Third-Party Store Revenues
China	1	$31,368.7M	$11,400.0M	$0.0M	$19,968.7M
United States	2	$14,779.9M	$9,555.6M	$4,969.8M	$254.5M
Japan	3	$12,385.3M	$8,862.2M	$3,329.9M	$193.2M
South Korea	4	$4,207.5M	$1,339.4M	$2,766.0M	$102.1M
India	5	$2,249.1M	$224.0M	$1,968.6M	$56.6M
United Kingdom	6	$1,599.8M	$924.2M	$614.0M	$61.5M
Germany	7	$1,522.5M	$607.1M	$844.3M	$71.1M
Indonesia	8	$1,511.2M	$209.9M	$1,265.6M	$35.8M
Canada	9	$1,342.5M	$790.3M	$513.7M	$38.5M
Australia	10	$1,097.8M	$703.8M	$362.7M	$31.3M

Find the complete ranking in the full report.

05. Key Global Trends

Trend 1

Privacy Changes Ripple Across the Mobile Market: Summary, Impacts, and Implications

The past months have seen further shifts around privacy and tracking in the mobile market. Perhaps the most influential change is **Apple**'s ATT (App Tracking Transparency), which launched in late April 2021 following two months of beta testing. The release is part of the iOS 14.5 update and means users must manually opt in for ATT to track their iOS devices, making it more challenging for developers to use targeted advertising for iOS users. Apple revoking its identifier for advertisers (IDFA) has disrupted marketing and user acquisition across the global mobile market, where mobile gaming plays a significant role in terms of engagement and revenues.

As of July 2021, roughly 85% of iOS users updated to the iOS 14.5 firmware (or above), as shown by Newzoo's Mobile Device Data. However, opt-in rates for ATT were just 17% globally as of mid-September, according to app monetization specialist Fyber.

The effects of ATT's implementation have rippled through the mobile ecosystem.

One direct impact of ATT is that advertisers have limited spend on iOS and, in some cases, have shifted part of their ad spending from iOS to Android. Nevertheless, iOS advertising spend is still significant and growing, albeit at a slower rate than Android. According to Fyber, since mid-June, overall ad spend has been around 50/50 between the two platforms, with more days in which Android ad spend was marginally higher than that of iOS.

Fyber is also seeing substantial gaps between eCPMs on IDFA opt-in inventory and IDFA opt-out inventory across different ad formats.

"The rollout of the new framework and the industry's adaptation has been both challenging and inspiring. Consumer privacy will get better. Mobile marketing will get harder. That's the reality, and marketers and app developers will be best served by changing their mindset and investing in understanding everything they can about their audience while not necessarily knowing who each user is.

Mobile game developers have enjoyed the luxury of instantly reaching their target audiences. Moving forward, developers must work smarter to mobilize their data and create measurement methods that work for them. Mobile marketers are now facing challenges that TV and radio marketers know all too well, but mobile companies have so much more data, even in the absence of user-level data. Contextual targeting, smart audience building, and other innovations are the new recipe for success in the mobile market. But becoming a success story will require more work than before."

David Simon, CRO and Global Head of Revenue Operations, Fyber

Fyber | a digital turbine company

Privacy Changes Disrupt Both Mobile Advertising and In-Game Monetization

Government Policies and Pressure Are Also Creating Ad Monetization Challenges

Find the complete trend on privacy changes in the full report.

Trend 2

Changes to the Mobile Market Accentuate the Pros and Cons of Hybrid Monetization

In last year's Global Mobile Market Report, we analyzed the hybrid-casual trend, which was catalyzed by oversaturation in the hypercasual space. The key takeaway was that hypercasual games, facing increased competition, needed to seek more diverse ways to monetize their player bases by taking inspiration from more core titles; for example, by complementing their in-game advertisements (IAAs) with in-app purchases (IAPs) and subscription monetization models. The resulting titles are called hybrid-casual games.

This year, the importance of a hybrid approach to monetization has become more pronounced, again due to the tightening privacy measures across the mobile market. More limited user tracking has amplified the necessity for diverse monetization and user acquisition (UA) strategies across casual games. These strategies can appeal to broader audiences and keep users engaged and retained for longer.

Core Games Are Also Adopting Strategies from the (Hyper)casual Space

Finding the Equilibrium in Hybrid Monetization

Find the complete trend on hybrid monetization in the full report.

Trend 3

The Apple vs. Epic Lawsuit's Anti-Steering Ruling Can Change Mobile (Game) Payments Forever, But the Lasting Impact Is Too Early to Judge

The results of the **Apple** vs. **Epic** lawsuit were revealed in mid-September 2021, following a year of deliberations (a relatively short turnaround given the complexity of the case). Ultimately, the judge decided in Apple's favor on nine-out-ten counts but chose to penalize Apple via an injunction for its anti-steering App Store policies. Anti-steering is when platform holders stop sellers from advertising alternate means to buy items or services outside their ecosystems.

Please note that at the time of writing, it is unclear if third-party payments will be allowed directly within apps or if developers can only provide external web links. Unless a higher court enjoins the injunction, the rule will take effect on December 9 (90 days after the announcement).

App Store Payment Changes Were Already Happening

The Injunction's Impact on the Mobile Market

Find the complete trend on the Apple vs. Epic Games lawsuit in the full report.

Trend 4

Apple and Google Expand Their Ad Businesses

Trend 5

A Throne of Games: Developers Are Constructing Content Fortresses to Ease Tracking Challenges

Trend 6

High-Fidelity Mobile Games: Growth, Challenges, and a Promising Future

Trend 7

A Short Update on Blurring Platform Lines: The (Mobile) Games Market Takes Important Steps

Find all seven trends in the full report.

06. Special Focus Topic

Consumer Insights into Mobile Gaming

Uncovering Mobile Gamers' Motivations, Attitudes Toward In-Game Ads, and IP Preferences

To get a consumer perspective from mobile gamers on their gaming motivations, their playing and spending behavior, and their attitudes toward in-game ads and IP preferences, we surveyed a representative sample of 5,400 mobile gamers aged 10-50, spread evenly over four key markets: the United States, China, Germany, and Japan.

Mobile gaming has become mainstream, and its popularity shows no halting. Understanding motivations and key sources that influence how players pick new mobile games and which audiences are most receptive to in-game ads and purchases is crucial for developers and advertisers alike. Moreover, IP-based games will have a vital role to play in a post-IDFA mobile market, as publishers are increasingly looking to diversify the ways they organically acquire users. Along this line, we've also investigated what entertainment IPs (books/comics/movies/TV shows) players think would make great mobile games.

Based on their self-reported spending habits, we've segmented the sample into four groups: non-spenders, minor spenders (gamers who spend up to $5/month on mobile games), average spenders ($5-$25/month), and big spenders ($25+/month). Our following analysis emphasizes the key differences among these four segments.

Key Takeaways

- The Pareto Principle (a.k.a. the 80/20 rule, stating that 80% of outcomes come from 20% of the causes) applies to the mobile gaming market. While big spenders only account for 20% of total mobile players, they make up nearly 80% of total spend.

- The bigger the spender, the more likely that the player looks for exciting, social, and competitive experiences in mobile gaming.

- Social media is a key channel to discover new mobile games. Streaming platforms, influencers, and game review/news sites are important sources of discovery for big and average spenders.

- Openness to in-game ads increases with players' level of investment in mobile games. As gamers become more engaged, they are more open to paying for subscriptions/content.

- IP preferences vary slightly across different genre players. Developers must think carefully about IP fit with the genre of their game.

Find more complete consumer motivations and attitudes in the full report.

apptopia

About

Apptopia is the leader in real-time competitive intelligence. Brands and financial firms use our platform to generate insights across mobile apps and connected devices. Powered by machine learning technology, we collect and analyze billions of complex data points to surface critical business signals.

More information and contact: **https://apptopia.com/**

Four Types of Competitive Intelligence

- Performance insights
- Search insights (ASO)
- Review insights
- Audience insights

Five Ways to Access Our Data

Webtool Subscription

Log into Apptopia's Web GUI and quickly identify interesting growth trends, monitor market share, or perform a competitive market growth analysis.

API

Full, unfiltered, and unlimited access to work with our data the way you want. Our API can integrate with virtually any of your existing systems and serve as a complement to your current data sets.

Custom Export Tool

Export any and all performance data from our site with our Custom Export Tool. Customize the data, granularity, and format exactly to your needs.

Integration Partners

Get quick and easy access to Apptopia data through AWS Data Exchange, Snowflake, or Salesforce.

Custom Database Integration

We will work directly with your team to build out a custom data feed to get the Apptopia data you want, where you want it, in the format which is actionable.

Newzoo: The Global Standard for Games Data

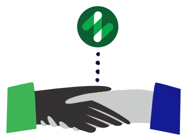
Our Services

Newzoo Platform

The go-to destination for accurate and actionable metrics, including game-level MAU for all platforms. Also includes our global reports data.

Consumer Insights

The best way to understand consumer engagement and profile your target group, including our gamer segmentation.



Consulting

Custom projects that put our experience and expertise to work on strategic and financial challenges.

Global Games Market Report,

Global Esports & Live Streaming Market Report

Newzoo Platform

Every report subscription includes access to our easy-to-use platform so you can slice and dice the data in multiple ways.

Questions?

Email us at:
questions@newzoo.com

Newzoo Expert

The ultimate games data tool. Newzoo Expert offers a 360-degree view of the games market to support your strategic decisions with a range of unique and actionable metrics. All in one easy-to-use platform.

- Game-level KPIs incl. MAU, retention, and churn
- Playing, viewing, social, and player engagement data
- 1500+ PC and console games, 1000s of mobile games
- Easy-to-use dashboard and API access
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