



# MOBILE GAMES INDUSTRY TRENDS SURVEY

Winter 2024/25

## INTRODUCTION

# 2024 In Mobile Games

**Craig Chapple**

Head of Content, PocketGamer.biz

**So long, 2024. While there were some successes, it wasn't a particularly pleasant period for many.**

The mobile games industry was actually back to growth, but layoffs and closures across the sector continued last year, with some coining the phrase 'survive to '25'. The simple goal? Make it out alive with as few scars as possible.

It all sounds quite dramatic. Let's not forget, of course, that only in 2023 did Scopely release Monopoly Go!, a title that has transformed an already successful company, making \$3 billion in just over 12 months.

Other notable games during the past couple of years include Habby's Cappybara Go, DeNA and The Pokémon Company's Pokémon Trading Card Game Pocket, FirstFun's Last War, Century Games' Whiteout Survival, Joy Nice Games' Legend of Mushroom, Paper Games' Love & Deepspace, and many more.

You can also throw games like Supercell's

Brawl Stars, EA's Sports FC and Konami's eFootball on the list – games released years ago and having the best year ever in 2024.

But that was all at the top. Despite other successes beneath, that wasn't 2024's narrative.

## A TOUGH YEAR

Our Mobile Games Developer Trends Survey Winter 2024/25 takes a snapshot of the sector and the temperature of the business. Naturally, layoffs were high up on the list of key trends on respondents' minds, cited as the biggest trend of last year by 56.7% of those surveyed. That was above rising UA costs, app store regulation, and the cross-platform shift.

And the industry has been squeezed in recent years since our last report in 2021, the height of growth in a bustling sector. Privacy changes and rising UA costs were highlighted as two of the biggest threats to the mobile games business, as well as high marketing and development costs, and a lack of investment.

In 2023, there was almost a denial of sorts. The mobile games industry couldn't be in decline, could it? Years of rampant growth can't just stop. But 2024 was the year reality set in.

One interesting element of this report is the simple question: How long has your organisation

been operating? Most respondents were at companies that have been running for 10 years+, while the number of people from companies operating for less than five years declined since our last survey.

Meanwhile, we asked companies how many games they have released over the past 12 months: just over 40% said none. The second most popular answer was one game at 22.2%. This could be a reflection of the market conditions the industry has found itself in, and a focus on live ops for long-term success.

## GREEN SHOOTS

So with all the doom and gloom out the way, is there much to look forward to in 2025? A new, more positive industry term has arrived: 'thrive in 2025'. While it doesn't change industry realities, it's worth noting again that the mobile games market is back to growth, investment is slowly rising, and there have even been a few big money M&A deals recently, like Miniclip's purchase of Easybrain and Playtika's acquisition of SuperPlay.

There's a hope that many companies in the industry have ridden out the toughest of times, and that firms are largely done with layoffs. Though, these are still ultimately an inescapable part of business.

New trends have emerged, helping developers avoid the budget squeeze they have been put under from rising UA, marketing and development costs, and the 30% platform fees. Regulatory changes, spearheaded in the US by Epic Games' various lawsuits, and the European Union's Digital Markets Act, are slowly creating cracks in the walled gardens of platform holders like Apple and Google.

An opportunity for alternative app stores and payment systems is emerging – though how that ultimately shakes out around the world is still to be seen. Regardless, developers and publishers are skirting commissions with direct-to-consumer practices on their own web shops.

Rewarded play looks set to continue as a trend, with new startups shaking up the UA space. There's also potential for generative AI technology, perhaps not this year, to help alleviate development and marketing costs. But how that ultimately impacts jobs also remains to be seen.

Then there's opportunities in new areas like web gaming and HTML5. That's a term that's been around for quite some time, but is coming into fashion this year. Last year, former EA CEO and founder Trip Hawkins highlighted browser gaming as a major opportunity for developers, and some of our Mobile Mavens also predicted it to be a key trend this year.

"I believe browser crossplay, with HTML5

*"The industry is finding new and creative ways to overcome challenges and bring back the good times. Let's hope that positivity and 'thrive in 2025' sentiment turns into reality."*

and WebGL, I think that's one of the next waves," said Hawkins.

"New hills to go after, not really crowded. Right now you can't really think of a leading company that's doing that, period."

### BETTER TIMES AHEAD?

Despite it all, the outlook for the mobile games sector is a positive one. Just over 44% of those surveyed had a positive to very positive outlook for the next 12 months, with a further 34.3% remaining neutral. Meanwhile, 13.4% had a negative to very negative outlook.

That's not quite the 75% positive outlook we saw in our 2021 survey, but it shows a much more hopeful industry as we move into 2025.

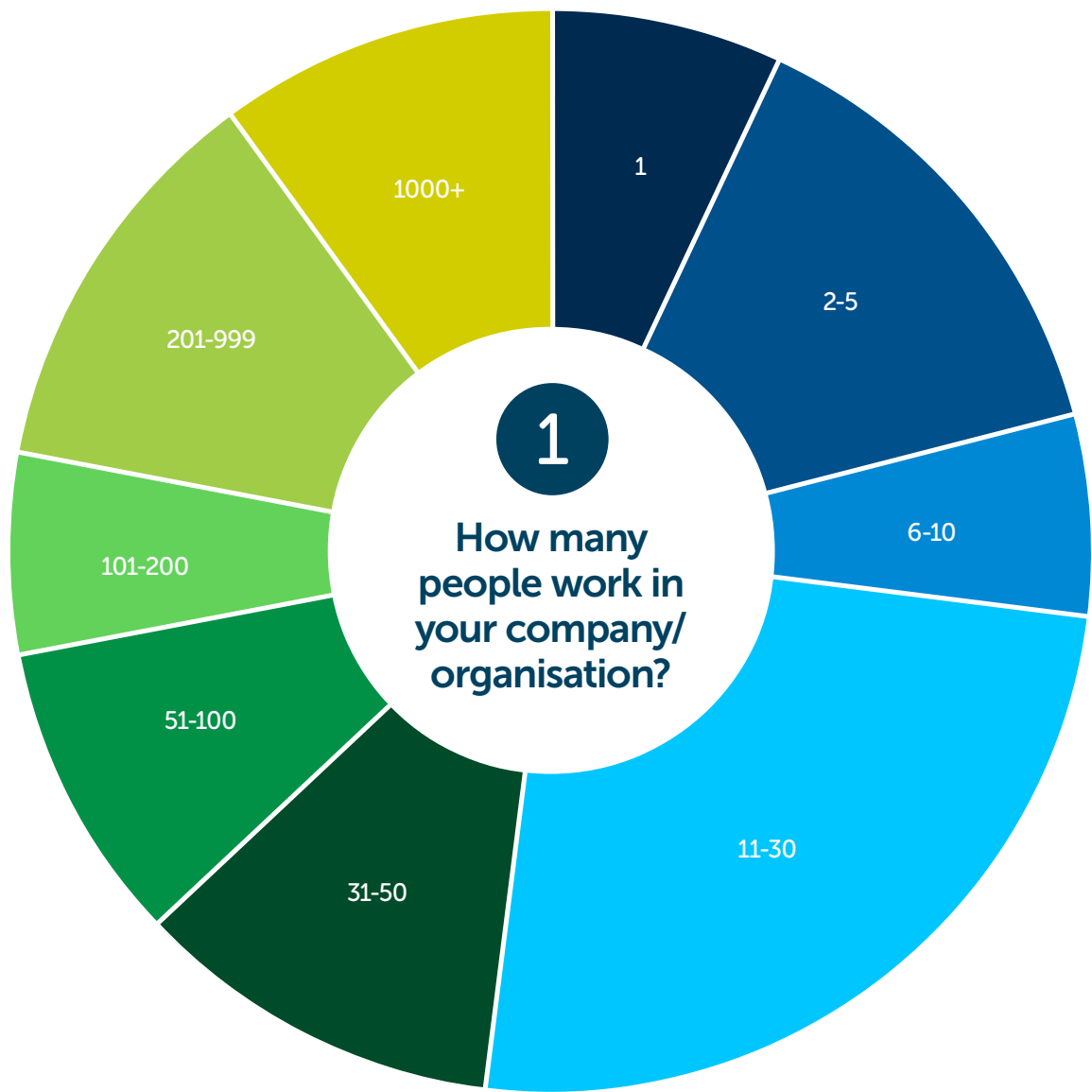
The industry is finding new and creative ways to overcome challenges and bring back the good times. Let's hope that positivity and 'thrive in 2025' sentiment turns into reality.

## CONTENTS

Company Profile	p4
Platforms & Products	p9
Budgets & Profits	p15
The Mobile Games Industry	p21

# COMPANY PROFILE

Your company and how it works

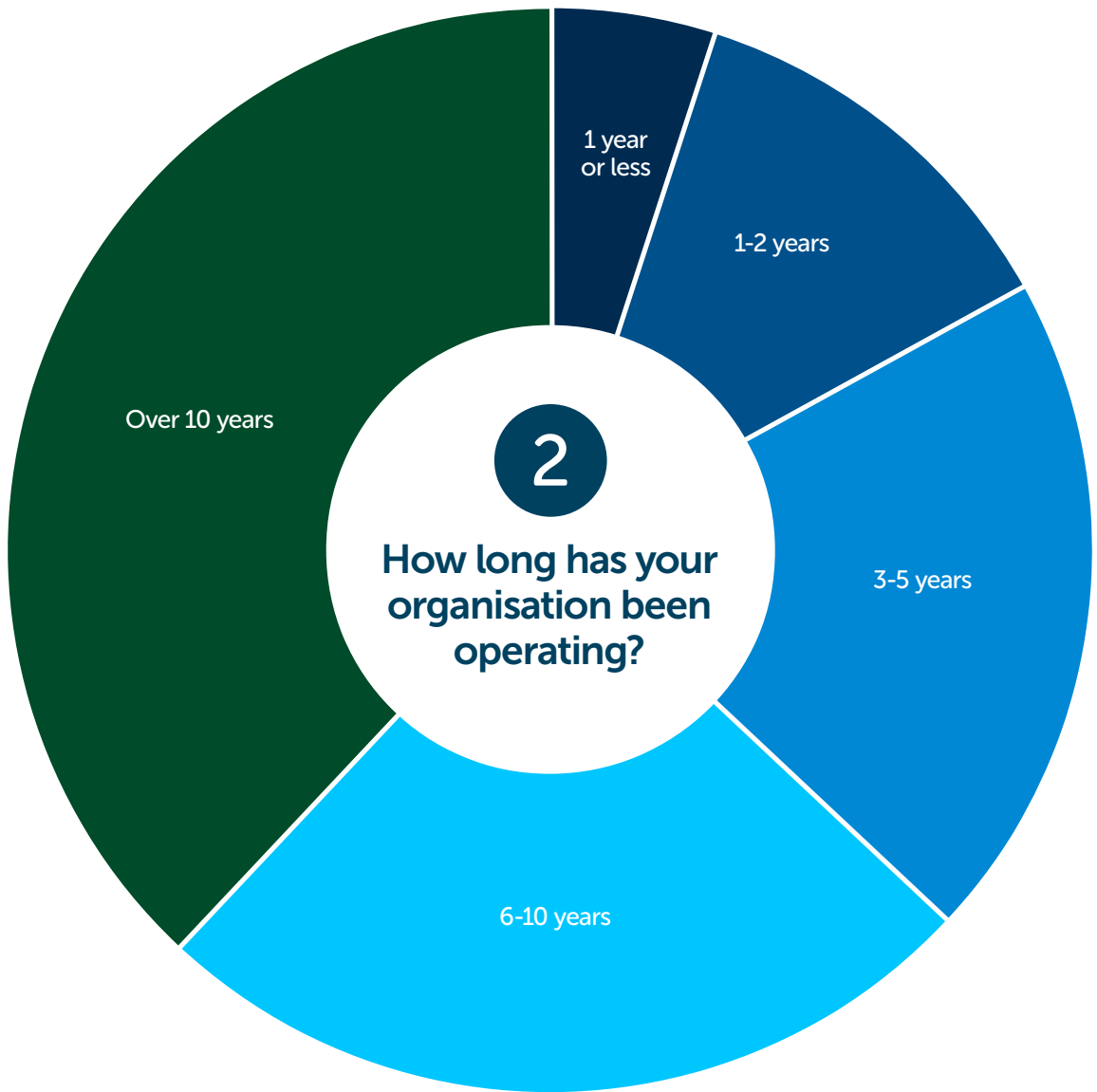


COMPANY PROFILE

TEAM SIZE	2024	2021	2020	2018
1	7.4%	14.9%	15.2%	13.1%
2-5	14.3%	21.6%	26.6%	21.3%
6-10	5.8%	9%	12.7%	9.0%
11-30	25.4%	20.4%	10.8%	16.4%
31-50	10.6%	8.2%	8.2%	7.0%
51-100	9.0%	7.8%	10.8%	7.8%
101-200	5.8%	5.1%	4.4%	7.8%
201-999	12.2%	9%	6.9%	8.2%
1000+	9.5%	3.9%	4.4%	9.4%

It's been a few years since our last report – perfect to see if there have been team size changes. Of those surveyed, 25.4% of respondents said they are part of a team with a headcount of 11 to 30. That's up from 20.4% in 2021, at which time the biggest group was teams of two to five at 21.6%.

Notably, the number of respondents at companies with teams of 11 or more has grown, while smaller operations and indie studios have shrunk – reflecting the challenges faced by small teams on mobile.



**DURATION**

	2024	2021	2020	2018
1 year or less	4.8%	13.7%	10.8%	7.0%
1-2 years	12.2%	18.4%	15.2%	16.0%
3-5 years	19.6%	24.7%	28.5%	29.1%
6-10 years	24.9%	20%	20.2%	23.4%
Over 10 years	38.6%	23.1%	25.3%	24.6%

During the past couple of years, the games industry has been struck by thousands of layoffs and a host of company closures. Investment has dried up for many, which has led companies to pivot in some cases, shut up shop, or reduce headcount.

Our survey shows 38.6% of respondents work at organisations that have been operating for over 10 years. A significant rise from 23.1% in 2021. The number of people representing companies five years and below have all decreased, perhaps reflecting closures and fewer startups. Indeed, the number of companies around for one year or less has fallen from 13.7% to 4.8%.



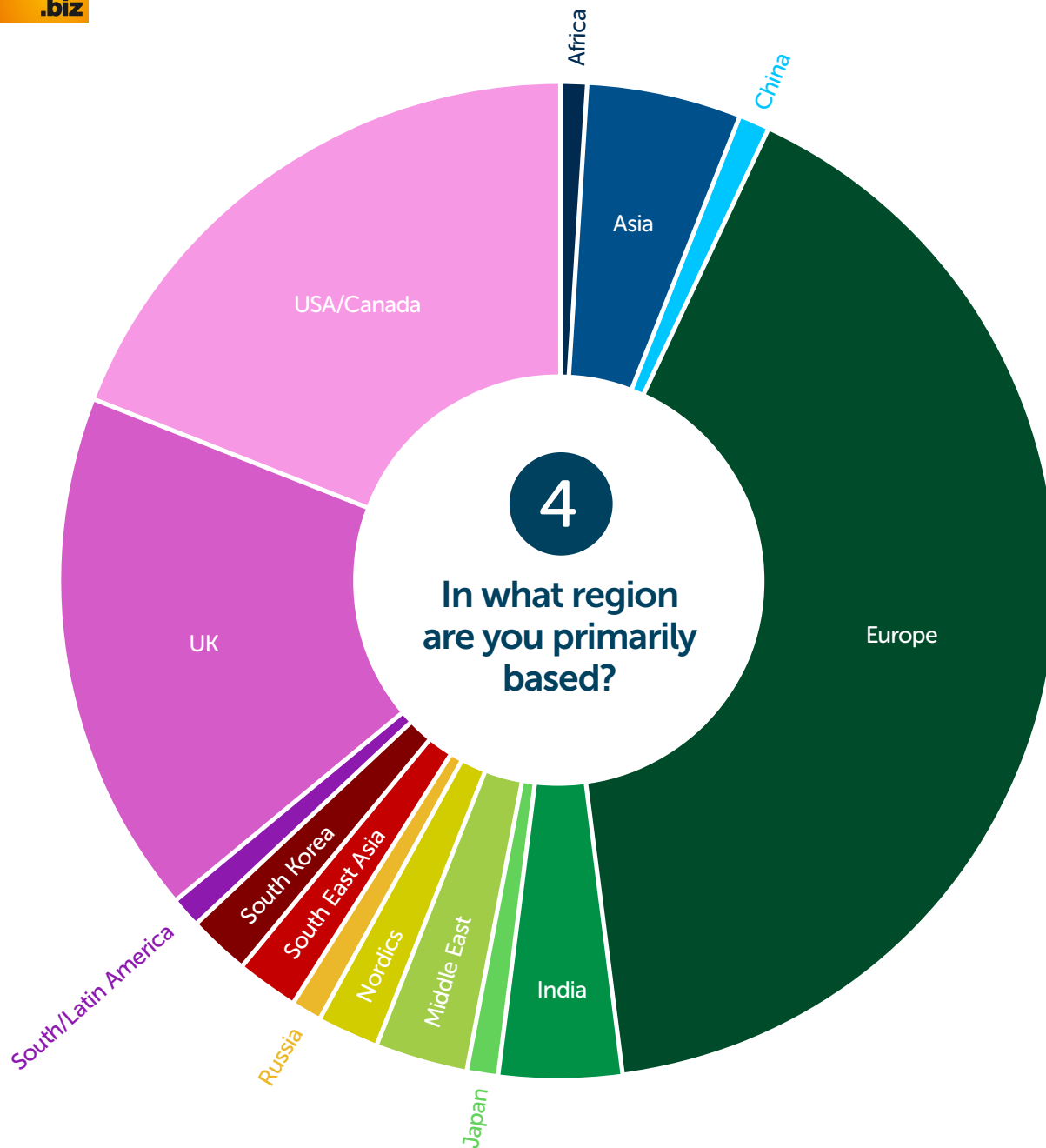
**DATA NOTE:** Some trends were not included prior to 2024

## COMPANY PROFILE

AREA	2024	2021	2020	2018
Developer	50.8%	58%	75.9%	63.5%
Publisher	11.1%	10.6%	6.9%	11.1%
Tools & Services	14.3%	11%	2.5%	9.8%
Investor/Incubator	2.7%	1.9%	1.3%	0.8%
Media	1.6%	5.9%	5.1%	2.9%
Academic	2.1%	0.8%	0.0%	0.8%
Consultant	5.3%	1.9%	1.9%	5.3%
Recruitment	0.5%	1.6%	0.0%	0.0%
Advertising	4.8%	-	-	-
PR	2.7%	-	-	-
Other	4.2%	8.2%	6.3%	5.7%

The games industry is made up of a wide variety of companies that form the ecosystem but the lifeblood of the sector comes from the developers, without which these other companies would have no revenue stream and services to sell. Setting the tone for our report, 61.9% of our respondents are on the development and publishing side of the business, with over half in development.

But we also have a cross-section of various other specialists, helping reflect the industry as a whole.



## COMPANY PROFILE

REGION	2024	2021	2020	2018
Africa	0.5%	1.9%	0.6%	0.0%
Asia	4.8%	5.9%	3.8%	2.9%
Australia/NZ	0%	2.3%	0.6%	0.8%
China	0.5%	1.6%	0.6%	2.1%
Europe	41.8%	28.2%	34.8%	33.2%
India	4.2%	4.7%	2.5%	1.6%
Japan	1.1%	1.6%	0.6%	0.8%
Middle East	3.2%	4.7%	1.3%	0.8%
Nordics	2.1%	3.5%	5.1%	5.7%
Russia	0.5%	1.6%	1.3%	1.6%
South East Asia	1.6%	2.3%	3.2%	1.6%
South Korea	2.1%	0.4%	0%	1.2%
South/Latin America	0.5%	4.3%	6.3%	4.5%
UK	17.5%	15.3%	16.5%	9.8%
USA/Canada	19.6%	21.6%	22.8%	33.2%

The vast majority of our survey respondents are based in Western countries, with Europe making up the largest cohort at 41.8%. The United States and Canada accounted for 19.6%, while the UK – split in this survey from Europe – made up 17.5%.

That means the key takeaways from this report are largely focused on trends in the West's games industry, and not necessarily indicative of those in regions like Asia or the Middle East, which accounted for 4.8% and 3.2%, respectively.

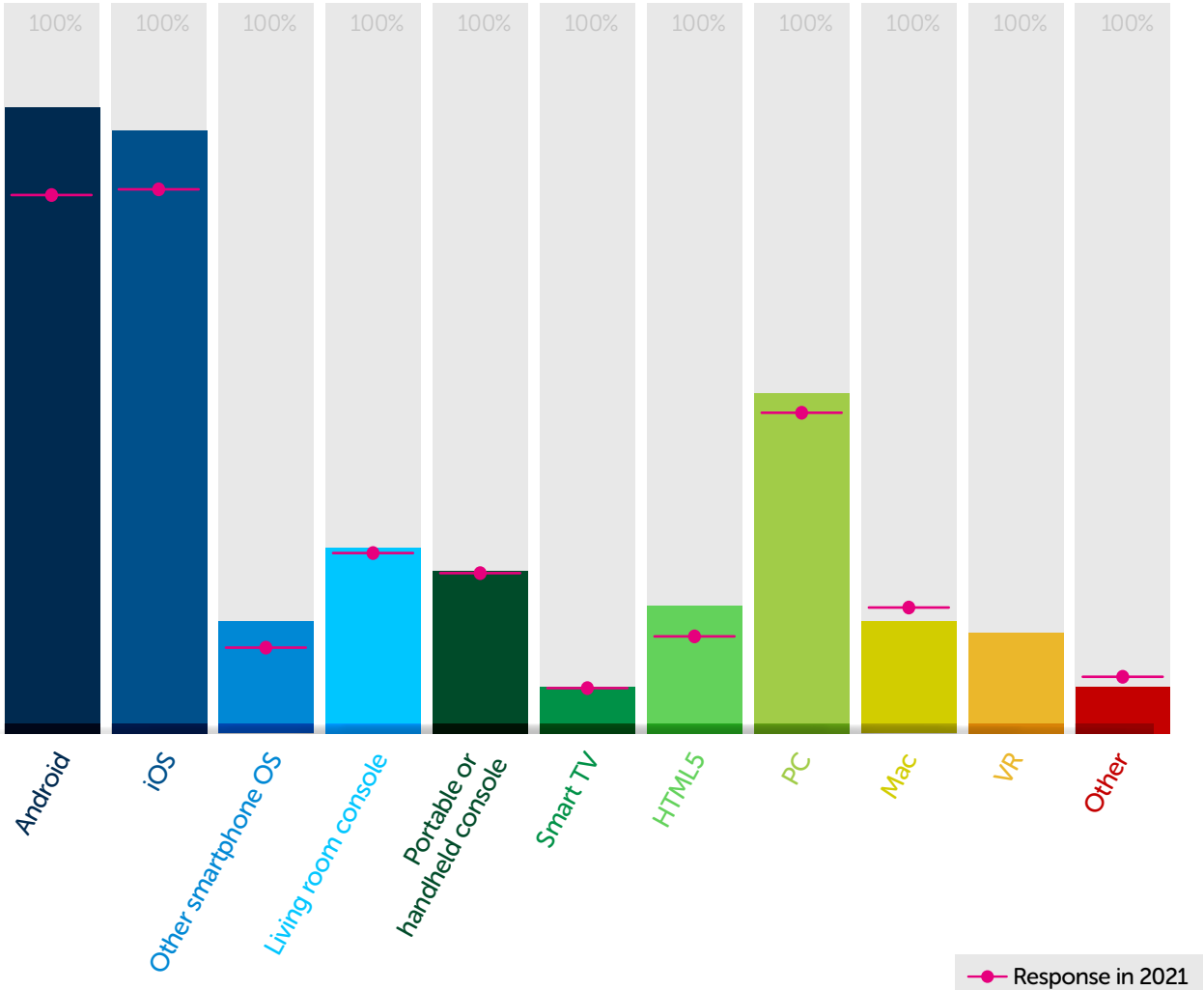


# PLATFORMS & PRODUCTS

Your current development focus

5

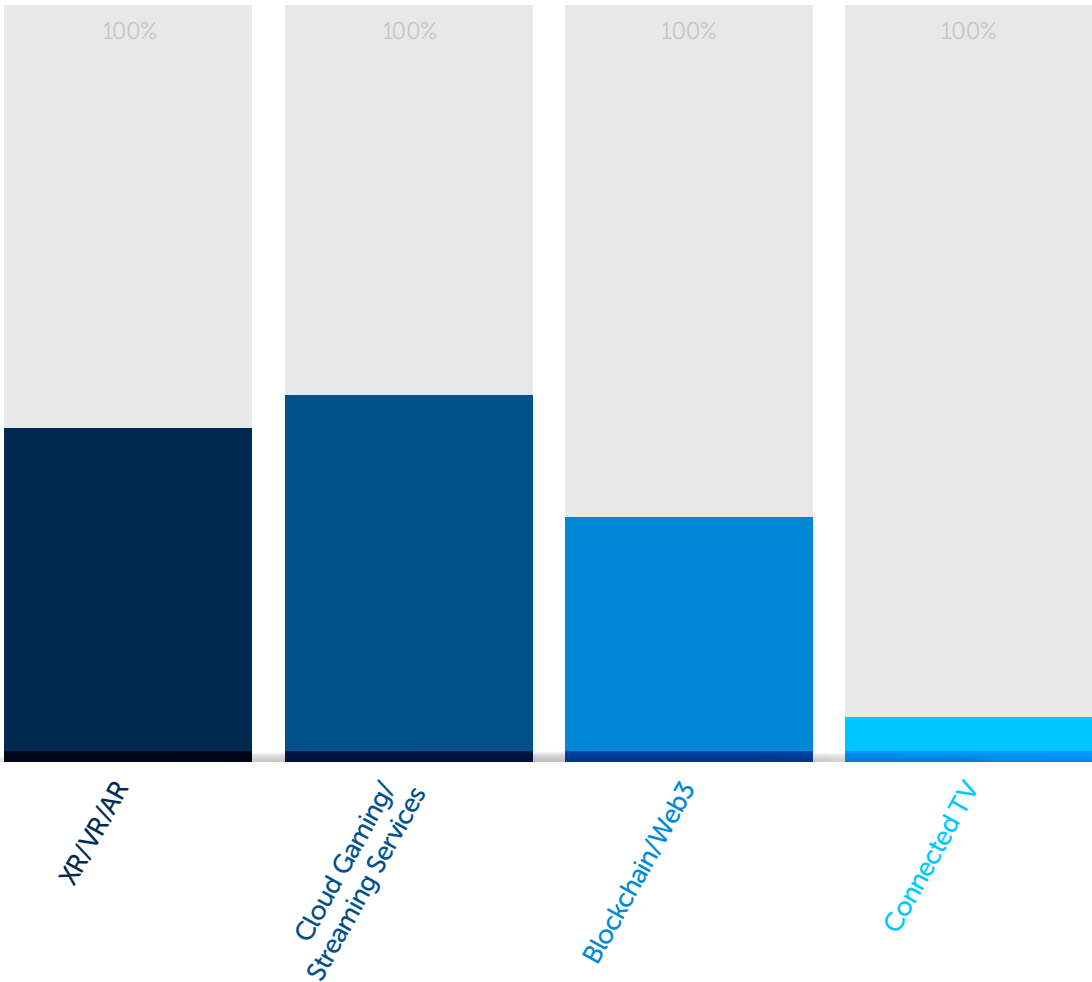
What platforms are most important to your organisation? (Tick all that apply)



DATA NOTE: Some trends were not included in 2021

PLATFORM	2024	2021
Android	85.7%	73.7%
iOS	82.5%	74.5%
Other mobile smartphone OS	15.3%	11.8%
Living room console (Xbox, PlayStation, etc)	25.4%	24.7%
Portable or handheld console (Nintendo Switch etc)	22.2%	22.0%
Smart TV	6.4%	6.3%
HTML5	17.5%	13.3%
PC	46.6%	43.9%
Mac	15.3%	17.3%
VR	13.8%	-
Other	6.4%	7.8%
<p>Spoiler alert: the majority of our respondents consider mobile the most important platform to their studio, with 85.7% reporting Android and 82.5% iOS.</p> <p>Interestingly, 'other mobile OS' has risen from 11.8% to 15.3%, with more opportunities on alternative app stores following global regulatory action and new marketplace launches. And HTML5, a trend to watch in 2025, was considered by 17.5% of respondents as a key platform for them. That's a rise from 13.3% in 2021. Interest in PC has also risen slightly to 46.6%.</p>		

## 6 Do you develop/publish for any of these technologies? (Tick all that apply)



### CHOICES

### RESPONSES

XR/VR/AR

44.8%

Cloud Gaming/  
Streaming Services

53.3%

Blockchain/Web3

35.2%

Connected TV

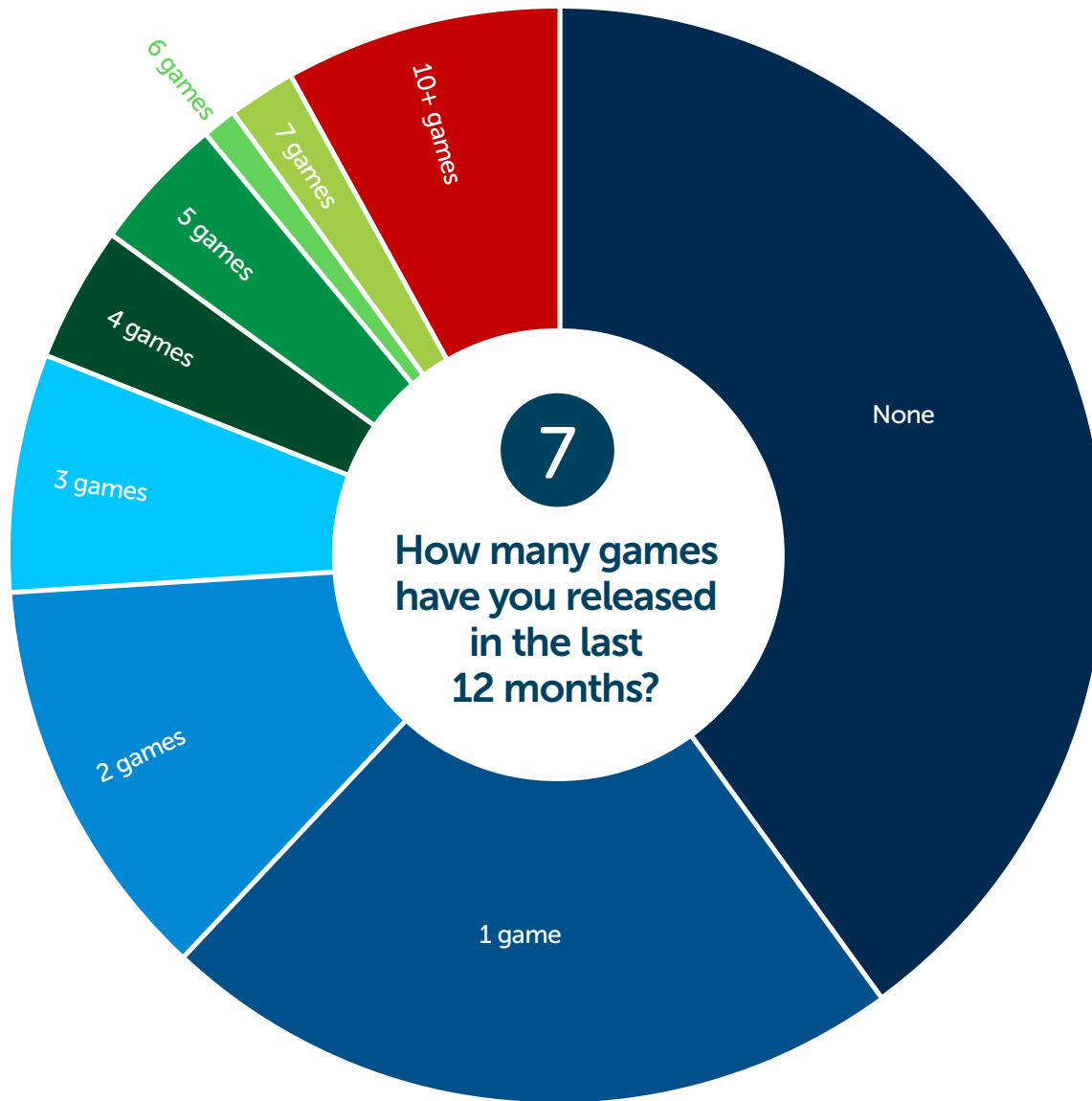
28.6%

New technologies and platforms like XR, cloud gaming, and blockchain haven't quite been able to take significant market share, despite large investments and key industry players such as Meta and Microsoft.

Of those that responded to the question, 53.3% said they develop and publish games for cloud gaming and streaming services, with developers and publishers taking advantage of deals with the likes of Apple, Netflix, and Crunchyroll.

Meanwhile, 44.8% of respondents said they make titles for XR/VR/AR.

Blockchain accounted for 35.2%, while 28.6% of those surveyed said they worked on projects for connected TVs.



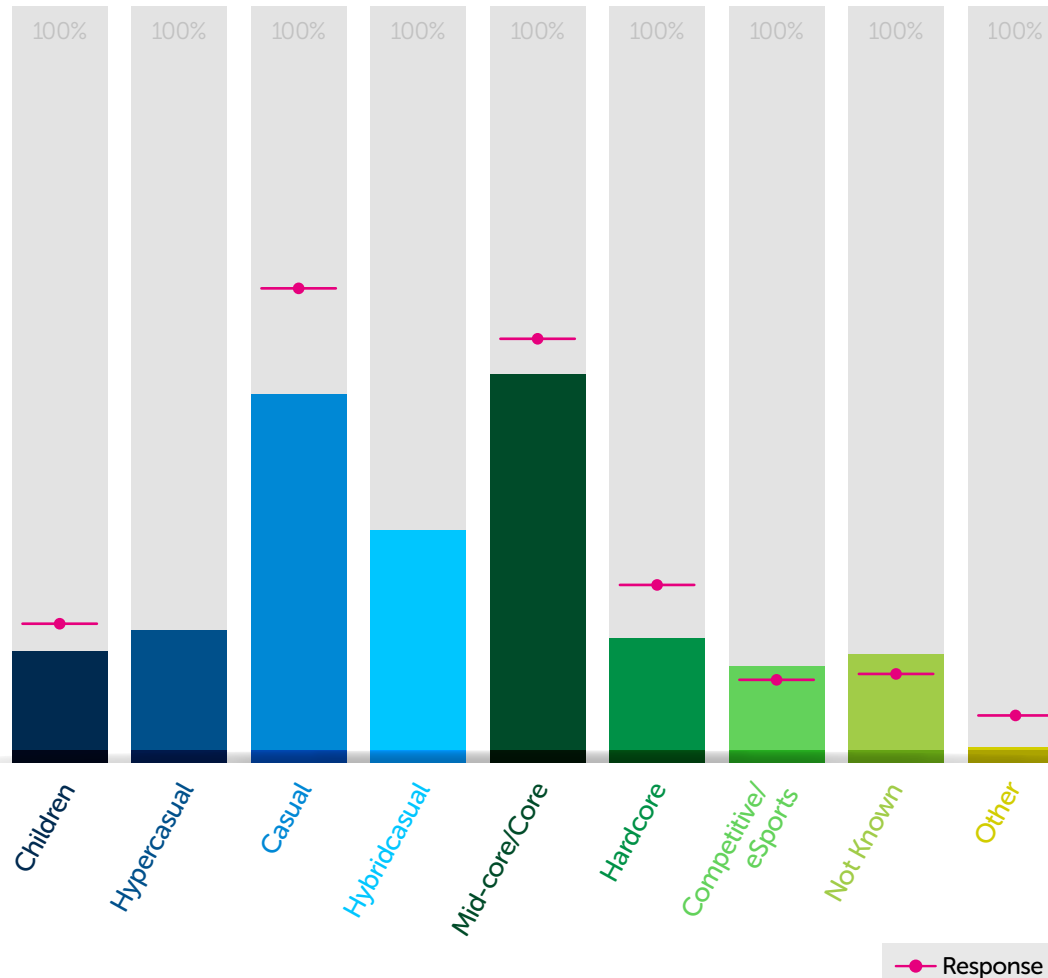
NUMBER	2024	2021	2020	2018
None	40.2%	39.2%	42.4%	25.3%
1 game	22.2%	21.2%	27.9%	23.5%
2 games	11.6%	14.5%	15.8%	21.6%
3 games	7.4%	9%	4.4%	11.7%
4 games	4.2%	2.3%	1.9%	3.1%
5 games	3.7%	5.1%	1.9%	2.5%
6 games	0.5%	0.4%	0%	0.6%
7 games	2.1%	1.9%	1.9%	0.6%
8 games	0%	1.9%	0.6%	1.2%
9 games	0%	0%	0%	0%
10+ games	7.9%	4.3%	3.2%	9.9%

The majority of companies said they had released zero games over the past 12 months, reflecting difficult market conditions and a focus on live ops in the mobile space – games that will run for years.

Of those surveyed, 22.2% said they had released one, 11.6% two, and 7.4% three games – responses not starkly different to the 2021 survey. It's worth noting, however, that in 2018 just 25.3% said they hadn't launched a game in the preceding 12 months, indicating how the sector has evolved since.

8

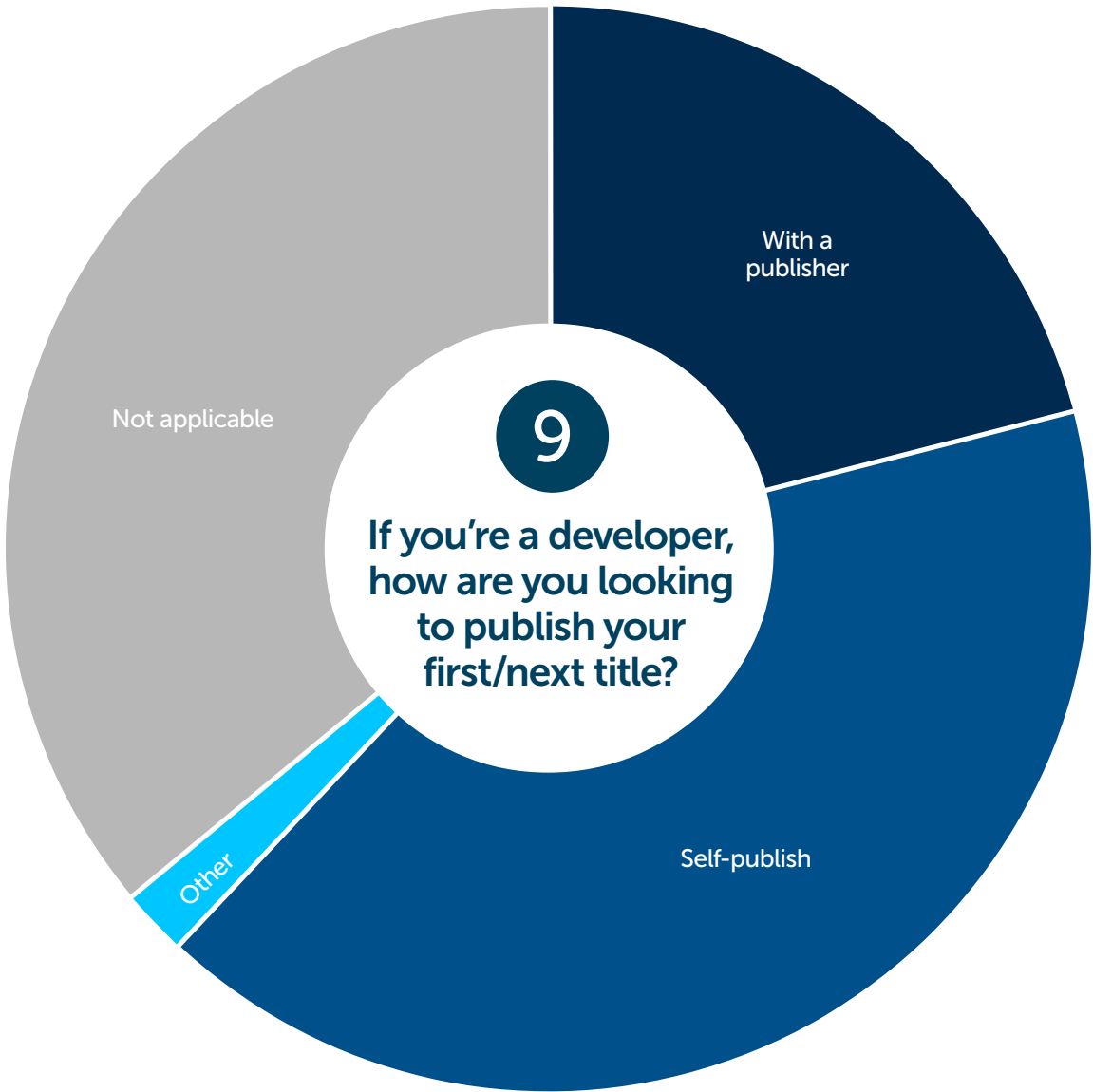
What type of gamer are you primarily developing or publishing for? (Tick all that apply)



DATA NOTE: Some trends were not included in 2021

GAMER TYPE	2024	2021
Children	14.8%	18%
Hypercasual	17.5%	-
Casual	48.7%	62.7%
Hybridcasual	30.7%	-
Mid-core/Core	51.3%	56.1%
Hardcore	16.4%	23.5%
Competitive/esports	12.7%	11%
Not Known	14.3%	11.8%
Other	2.1%	6.3%

Most companies are primarily developing and publishing titles for mid-core/core (51.3%) and casual (48.7%). Both of those spaces have seen a drop in respondents since 2021, with mid-core/core previously cited by 56.1% as an important category, while 62.7% previously mentioned casual. With the challenges in hypercasual, due to privacy changes in recent years on mobile, 17.5% said they were primarily focussed on hypercasual games, while 30.7% said hybridcasual, the evolution of the former's business model that features an extra progression layer and a hybrid mix of ads and IAPs.



CHOICES

2024

2021

With a publisher

20.6%

28.2%

Self-publish

41.3%

40.8%

Other

2.1%

1.9%

Not applicable

36%

29%

20.6% of developers aim to publish their first/next game with a publisher, a notable drop from 28.2% in 2021. Meanwhile, 41.3% of respondents said they plan to self-publish, representing a small increase from 40.8% in 2021.

With 40.2% of those surveyed stating they haven't released a game during the past 12 months, it's perhaps no surprise to see that 36% responded with 'not applicable', a rise from 29% in 2021.

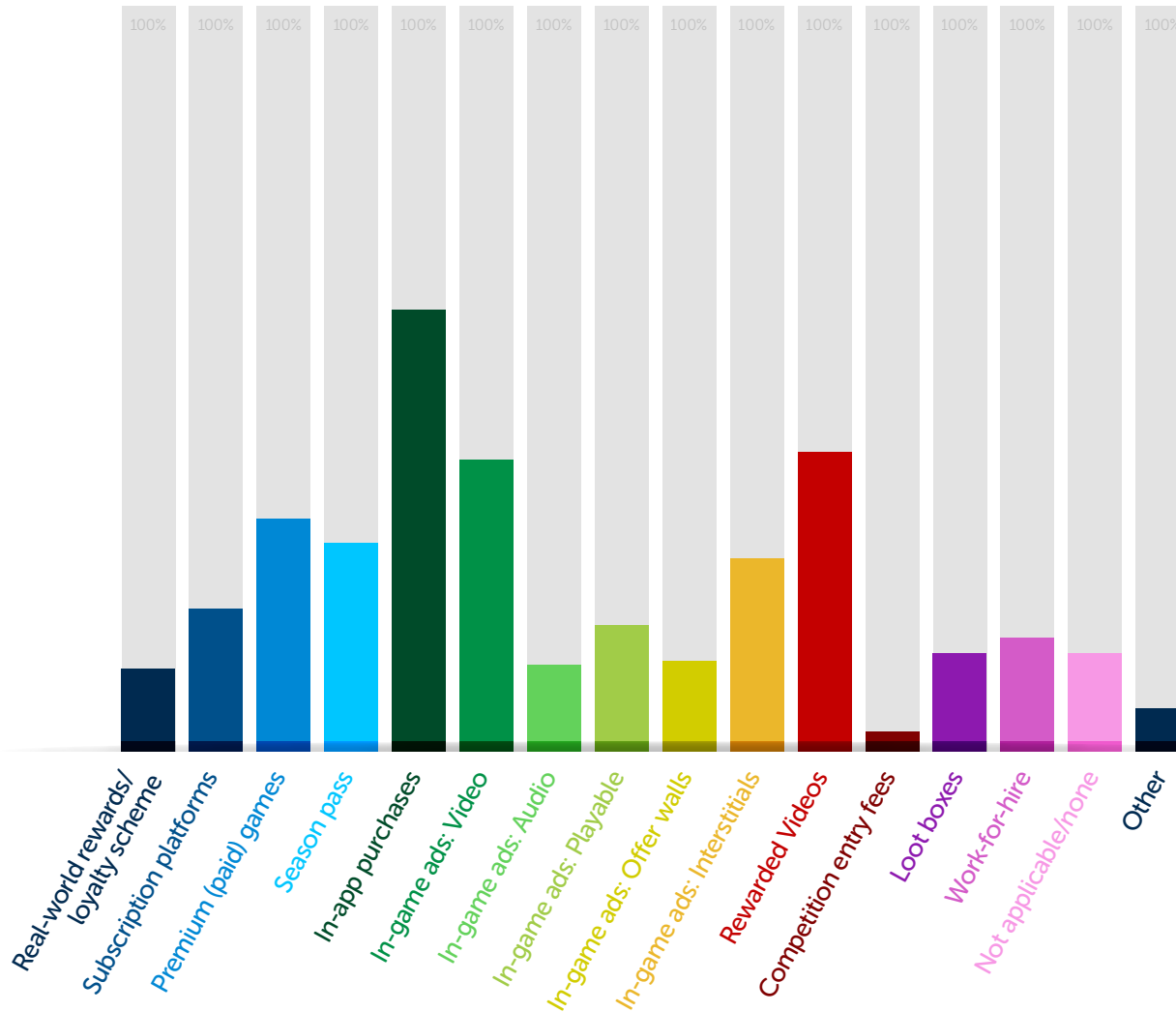
# BUDGETS & PROFITS

How much are you spending on making and promoting your games?

10

## What business models do you use?

(Tick all that apply)



## MODEL

## RESPONSES

Real-world rewards/loyalty scheme	11.1%
Develop for subscription platforms	19.1%
Premium (paid) games	31.2%
Season pass	28%
In-app purchases	59.3%
In-game advertising: Video	39.2%
In-game advertising: Audio	11.6%
In-game advertising: Playable	16.9%
In-game advertising: Offer walls	12.2%
In-game advertising: Interstitials	25.9%
Rewarded Videos	40.2%
Competition entry fees	2.7%
Loot boxes	13.2%
Work-for-hire	15.3%
Not applicable/none	13.2%
Other	5.8%

It's of course no surprise to find in-app purchase leading the way (59.3%) when we asked companies what business model they use. What is interesting, though, is other trends in the market.

The most popular in-game ad formats were video (39.2%), interstitials (25.9%), and playables (16.9%). Of those who responded, 28% said they use season passes, a business model popularised by Fortnite.

Elsewhere, some 31.2% said they make premium (paid) games, while 19.1% develop for subscription platforms.

Meanwhile, just 13.2% of respondents said they use loot boxes.





**DATA NOTE:** Some trends were not included prior to 2024

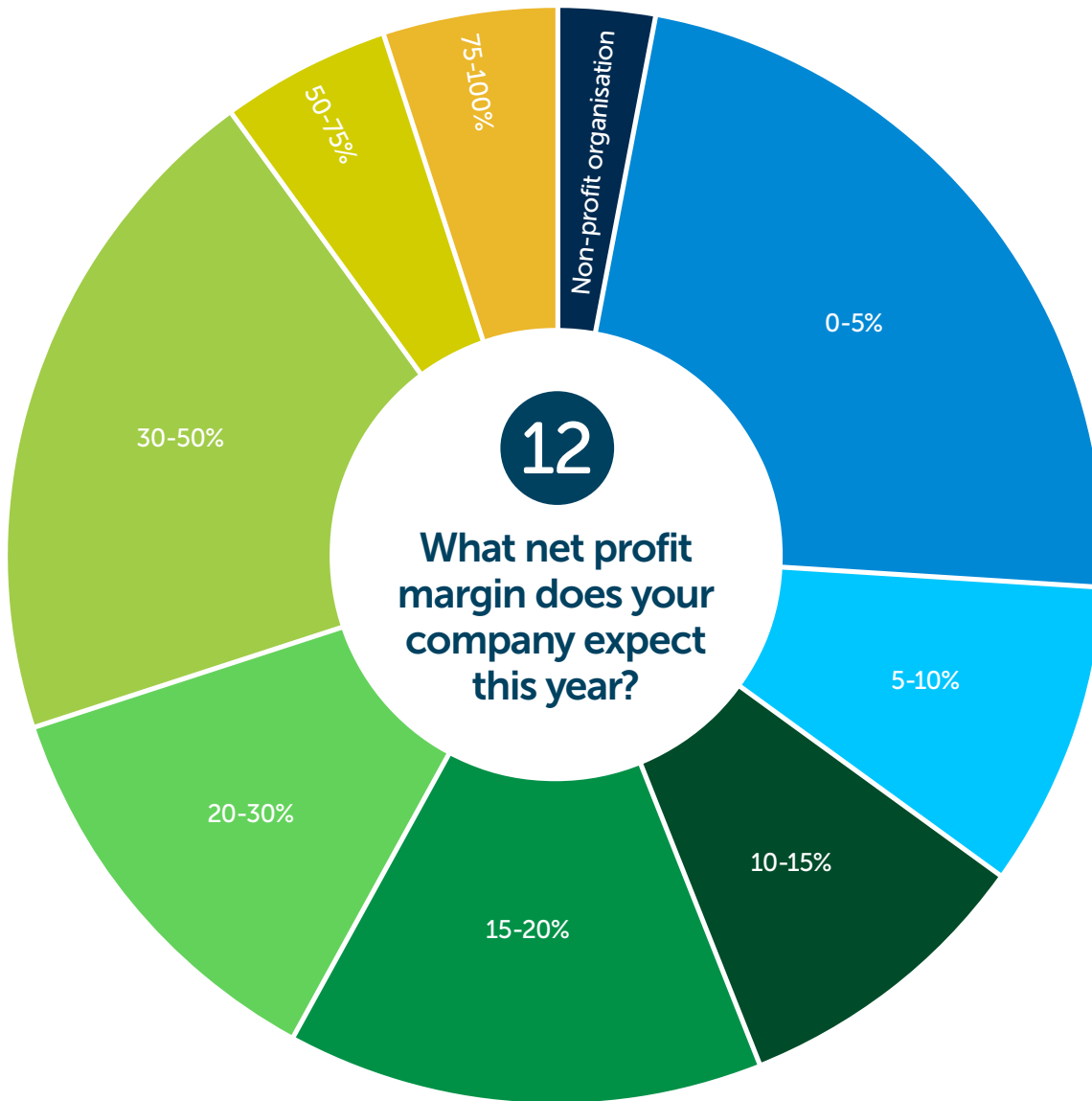
## BUSINESS MODELS & BUDGETS

NUMBER	2024	2021	2020	2018
None	1.8%	9.3%	-	-
Less than \$10k	9.5%	11.1%	13.9%	27.2%
\$10k-\$20k	3.0%	9.73%	10.2%	
\$20k-50k	4.7%	3.5%	6.6%	10.5%
\$50k-100k	4.1%	7.5%	10.2%	4.9%
\$100k-200k	6.5%	9.3%	8%	4.9%
\$200k-300k	5.9%	8.4%	2.2%	6.8%
\$300-500k	4.1%	4%	8.8%	4.9%
\$500-1m	4.7%	4.4%	2.9%	8.0%
\$1m-\$3m	10.1%	4.8%	6.6%	13.6%
\$3m-\$5m	2.4%	4%	3.6%	
\$5m+	4.1%	-	-	-
Not applicable or Prefer not to say	39.1%	23.9%	27.1%	19.1%

The games industry is a notoriously closed-book when it comes to development budgets. Some 39.1% of respondents didn't divulge their range.

10.1% of respondents did share they operate with a budget of \$1 million to \$3 million, up from 4.8% in 2021. Meanwhile, 9.5% said the average budget they worked with was less than \$10,000.

It's worth noting the decreasing distribution across nearly every tier of the \$10k-\$300k range since 2021, reflecting increasing development costs.



**DATA NOTE:** Some trends were not included prior to 2024

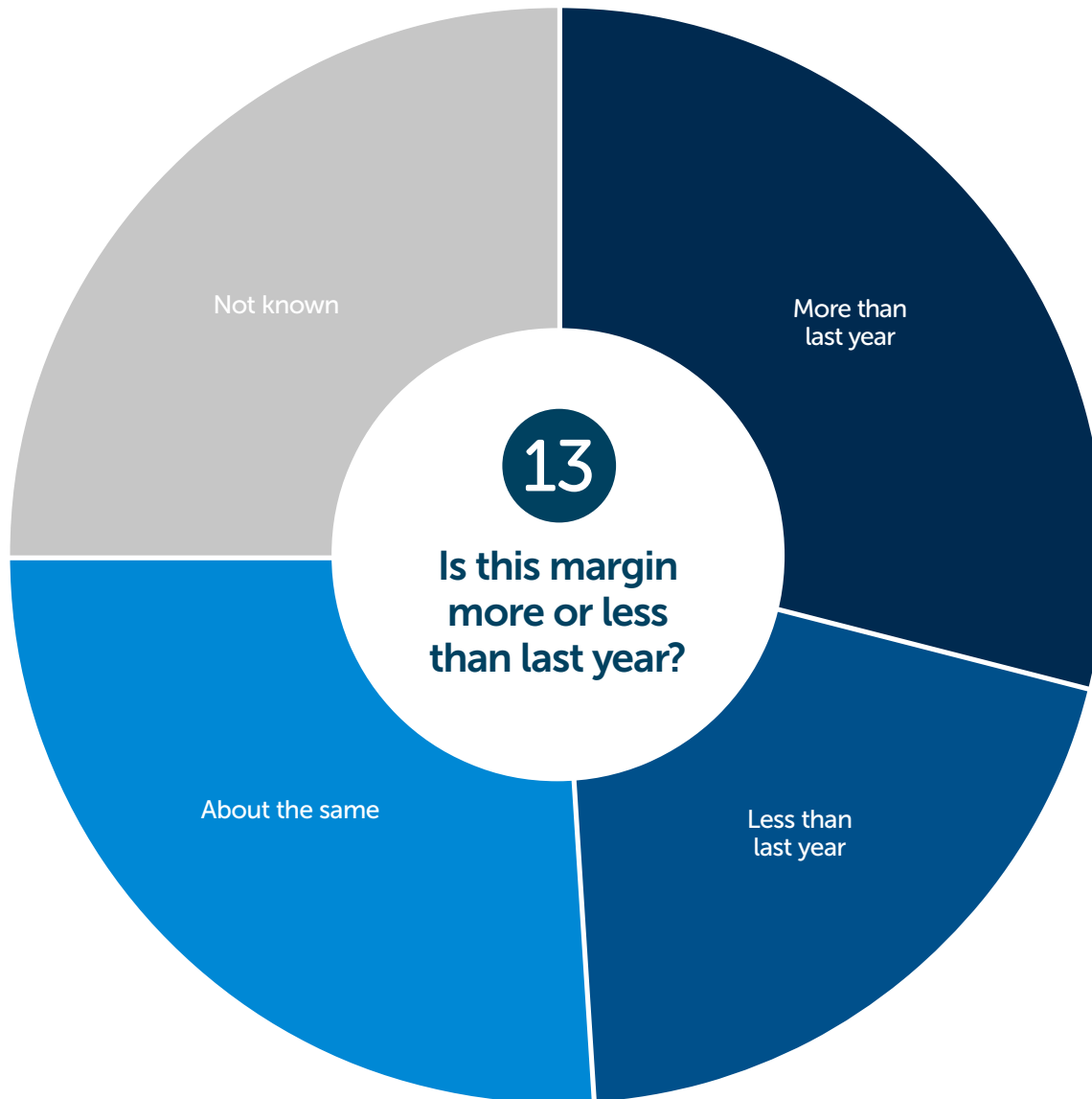
## BUSINESS MODELS & BUDGETS

OPTIONS	2024	2021	2020	2018
Non-profit organisation	3.5%	5.6%	6.2%	5.7%
Loss expected	-	25%	-	-
0-5%	23.3%	9.7%	23.6	28.2%
5-10%	9.3%	2.8%	11.1%	12.8%
10-15%	9.3%	8.3%	4.9%	9.8%
15-20%	14%	8.3%	12.3%	14.1%
20-30%	11.6%	18.1%	14.8%	11.2%
30-50%	19.8%	12.5%	17.2%	7.1%
50-75%	4.7%	2.8%	7.4%	5.7%
75-100%	4.7%	0%	0%	1.4%
100-200%	0%	2.8%	0%	1.4%
Over 200%	0%	4.2%	2.5%	2.7%

Once again, companies kept business numbers a closely guarded secret in our anonymous report, with nearly half (49.1%) of respondents not prepared to reveal their forecasted net profit margin this year.

Of those who did share their figures, 23.3% said they expected a net profit margin of 0-5%, up from 9.7% in our 2021 survey. Meanwhile, 19.8% forecast a margin of 30-50%, and 14% a margin of 15-20%.

With the gradual rise in web shops and direct-to-consumer activities, as well as the potential for new regulatory action and enforcement on platform holders, it'll be interesting to see our next survey.



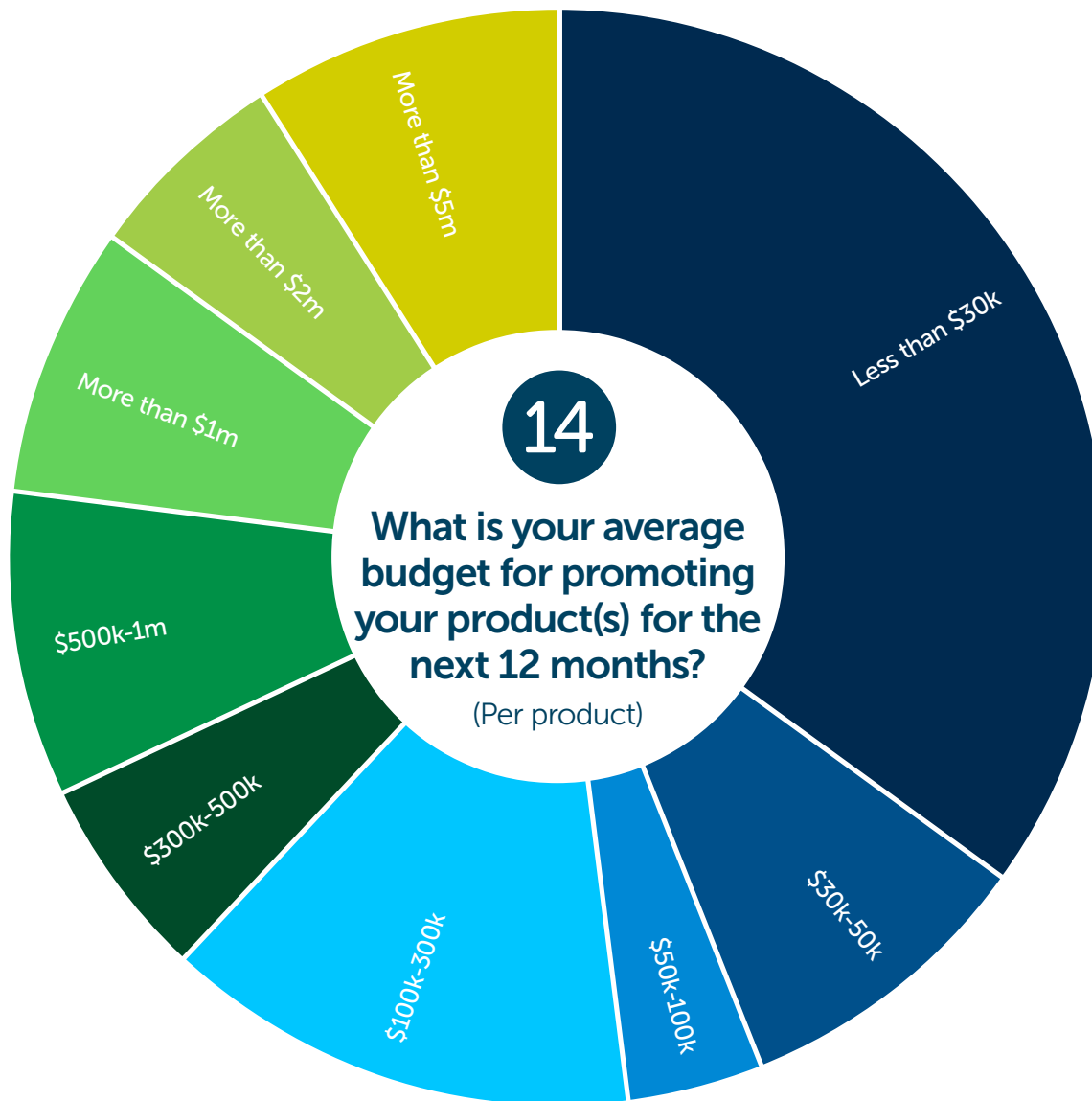
#### CHOICES

	2024	2021	2020	2018
More than last year	29%	34.1%	38.7%	43.2%
Less than last year	19.5%	16.8%	13.9%	7.4%
About the same	26%	23.9%	20.4%	15.4%
Not known	25.4%	25.2%	27%	34%

Expanding on the previous slide of expected net margins, those who did respond supplied a near even spread of answers.

Perhaps owing to a return to growth for the games market and direct-to-consumer practices, 29% said they expect a better net margin than last year in 2025. Meanwhile, 19.5% said they expect less than last year, while 26% forecasted the same.

A quarter of respondents said they did not know what to expect for the coming year.



**DATA NOTE:** Some trends were not included prior to 2024

## BUSINESS MODELS & BUDGETS

BUDGET	2024	2021	2020	2018
Less than \$30k	34.7%	37.6	52.6	48.2
\$30k-50k	9.5%	8.3	4.3	12.5
\$50k-100k	4.2%	8.3	9.7	4.2
\$100k-300k	13.7%	13.8	12.9	6.7
\$300k-500k	6.3%	13.2	1.0	4.2
\$500k-1m	9.5%	6.9	2.2	9.2
More than \$1m	7.4%	11.8	17.2	15.0
More than \$2m	5.3%	-	-	-
More than \$5m	9.5%	-	-	-

When it comes to average marketing budget, 34.7% of respondents said they had a budget of less than \$30k, while 13.7% said they had \$100k to \$300k, 9.5% with \$500k to \$1 million, and a further 9.5% said they had a budget of more than \$5 million.

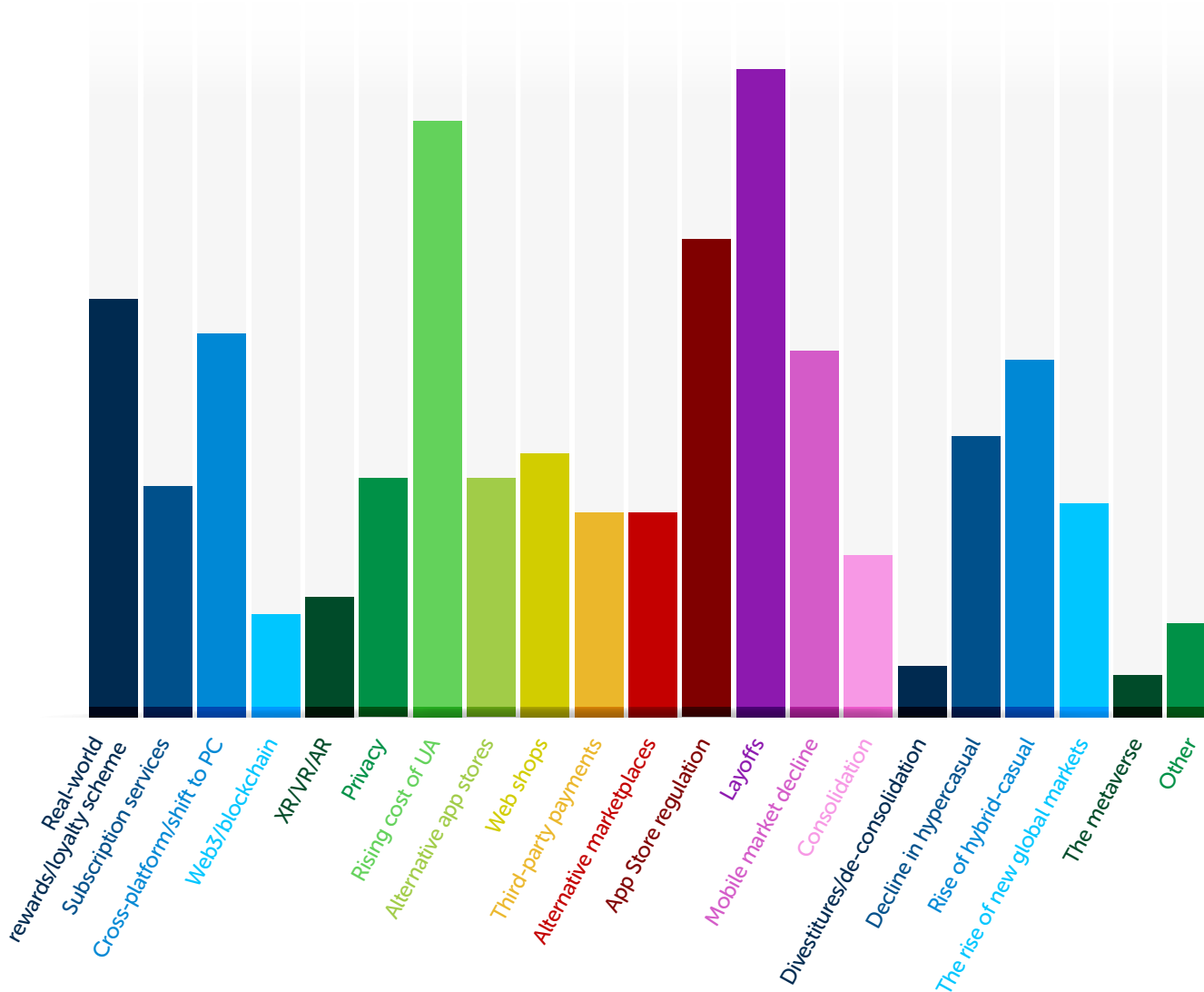
It's worth noting the size of the companies that responded to this survey, as well as the genres and platforms they target. Around 31% of respondents said they made premium games, while 19.1% said they develop for subscription platforms, when asked what business models they used.

# THE MOBILE GAMES INDUSTRY

Global trends and market outlook

15

Looking back at the year so far, what were the key trends for the mobile games industry? (Please tick all that apply)



## TRENDS

## RESPONSE

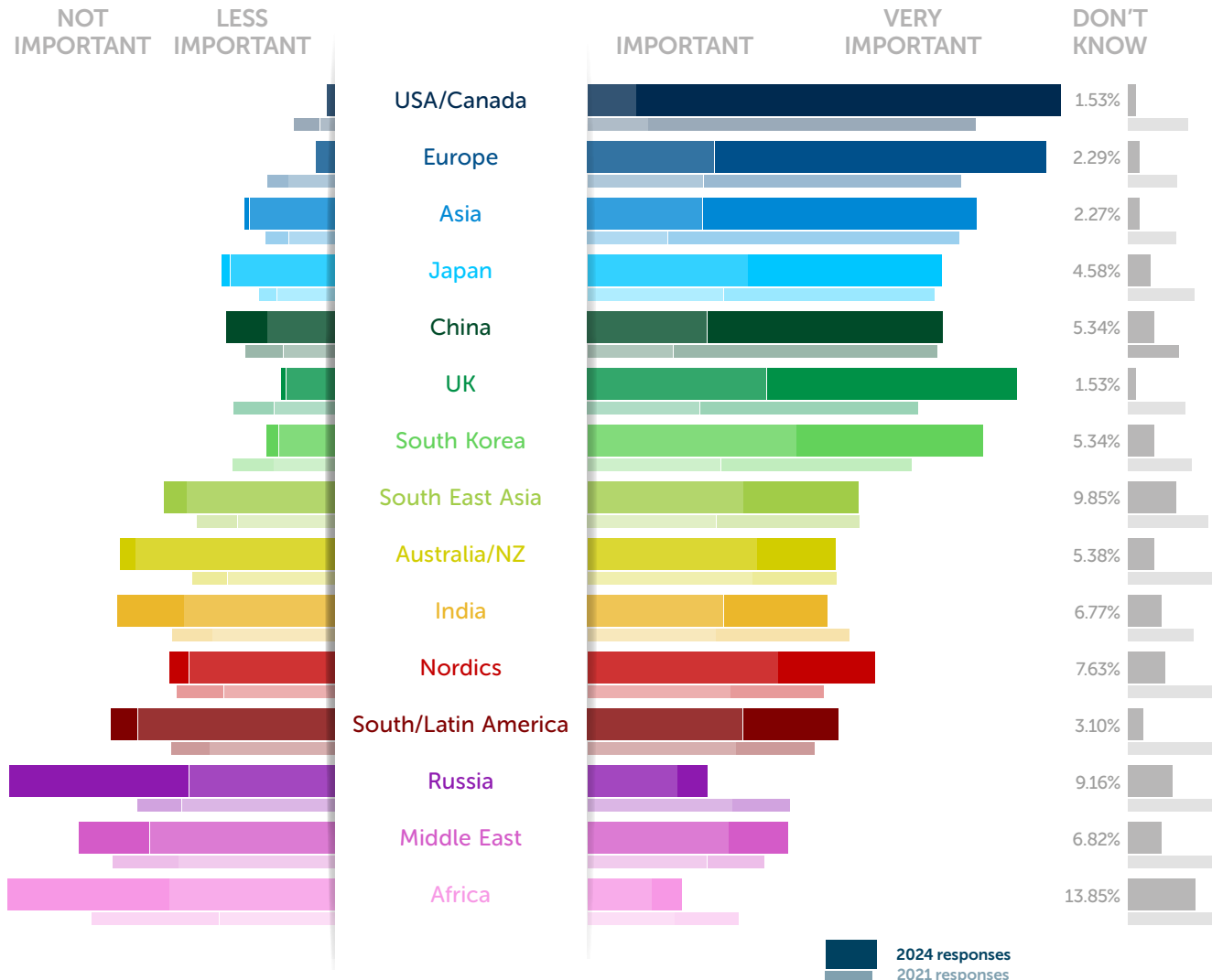
Changes to Unity (or other) pricing models	36.6%
Subscription services	20.2%
Cross-platform/shift to PC	33.6%
Web3/blockchain	9%
XR/VR/AR	10.5%
Privacy	20.9%
Rising cost of UA	52.2%
Alternative app stores	20.9%
Web shops	23.1%
Third-party payments	17.9%
Alternative marketplaces	17.9%
App Store regulation	41.8%
Layoffs	56.7%
Mobile market decline	32.1%
Consolidation	14.2%
Divestitures/de-consolidation	4.5%
Decline in hypercasual	24.6%
Rise of hybrid-casual	31.3%
The rise of new global markets	18.7%
The metaverse	3.7%
Other (please specify)	8.2%

Layoffs, rising cost of UA, and App Store regulation represent the major challenges the games industry has faced over the past couple of years.

Regulation, resulting in alternative payment systems and stores, is one potential remedy and opportunity to improve margins for developers and publishers.

16

In your opinion, rate these regions in terms of importance in the global mobile games industry



## THE MOBILE GAMES INDUSTRY

REGION	NEGATIVE RESPONSE	POSITIVE RESPONSE
USA/Canada	1.5%	96.9%
Europe	3.8%	93.9%
Asia	18.2%	79.5%
Japan	22.9%	72.5%
China	22.1%	72.5%
UK	10.7%	87.8%
South Korea	13.7%	80.9%
South East Asia	34.9%	55.3%
Australia/NZ	43.9%	50.8%
India	44.4%	48.9%
Nordics	33.6%	58.8%
South/Latin America	45.7%	51.2%
Russia	66.4%	24.4%
Middle East	52.3%	40.9%
Africa	66.9%	19.2%

As we noted earlier, a significant proportion of respondents to our survey are based in Western countries. So it makes sense that 96.9% highlighted the USA/Canada as the most important region for the industry, followed by Europe at 93.9%, and the UK at 87.8%. Interesting, however, is that 80.9% responded positively to the importance of lucrative markets like South Korea, while 72.5% highlighted China and Japan, respectively.

On the other end of the spectrum, 66.9% said the Africa market was less important or not important, highlighting its status as an emerging industry.



OUTLOOK	2024	2021	2020	2018
Very Negative	2.2%	2.3%	1.1%	0.5%
Negative	11.2%	7.9%	8.4%	2.6%
Neutral	34.3%	7.3%	13.7%	14.7%
Positive	38.1%	39%	38.0%	44.5%
Very Positive	6.0%	36.7%	29.4%	30.4%
Difficult to say	8.2%	6.8%	9.5%	7.3%

Despite all the layoffs and closures of the past couple of years, the 'survive to 25' mantra saw respondents give a largely positive outlook (38.1%) for the year ahead. In fact, Overall, 44.1% had a positive or very positive outlook for 2025.

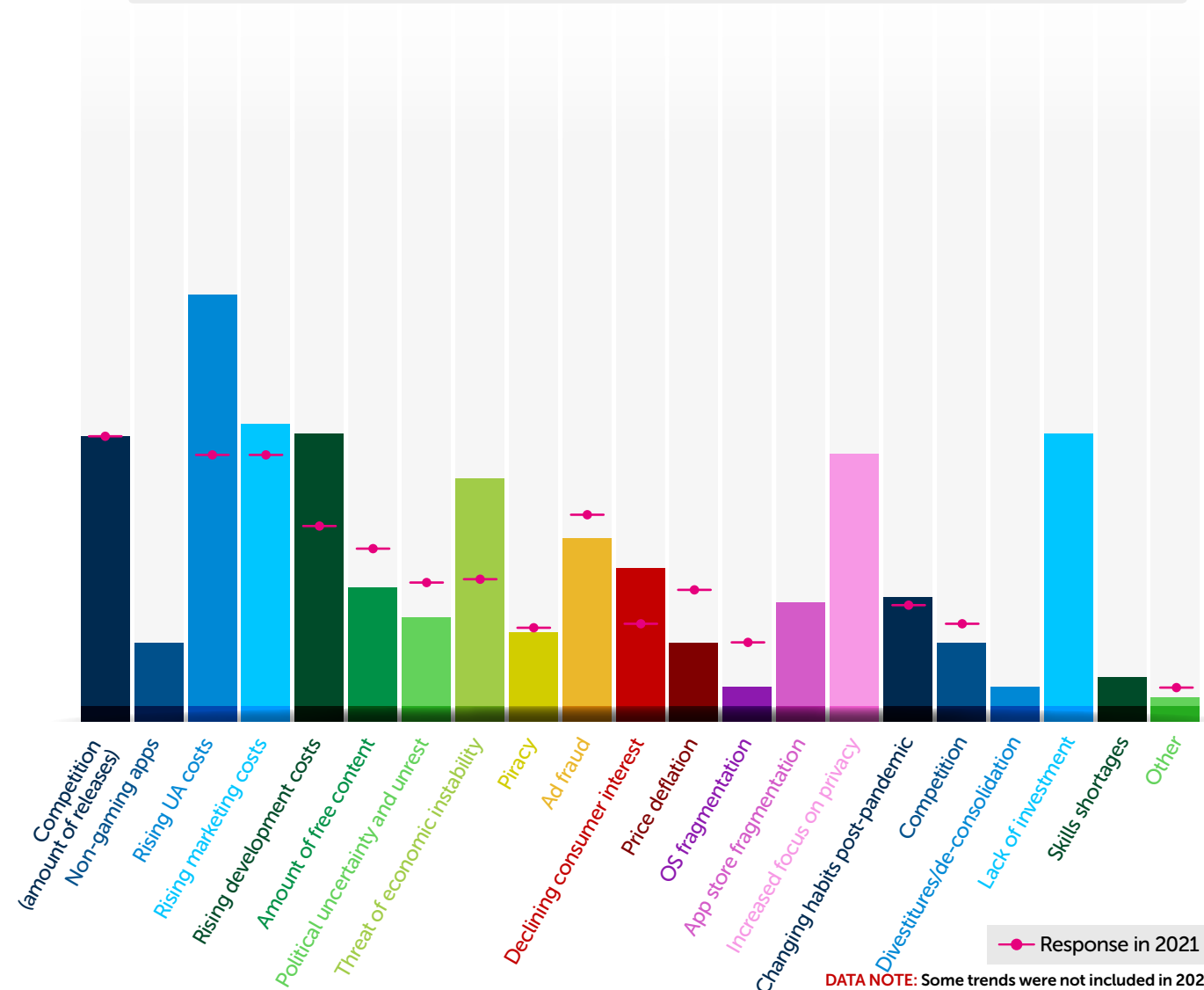
Meanwhile, just 13.4% had a negative or very negative outlook for the year. A further 34.3% of respondents responded naturally.

A new industry term being coined this year is 'thrive in 2025', and while it remains to be seen how the industry will look in 12 months' time, there's clearly more positivity coming back into the sector.



18

What do you think are currently the biggest threats to the global mobile games business? (Tick all that apply)



## THE MOBILE GAMES INDUSTRY

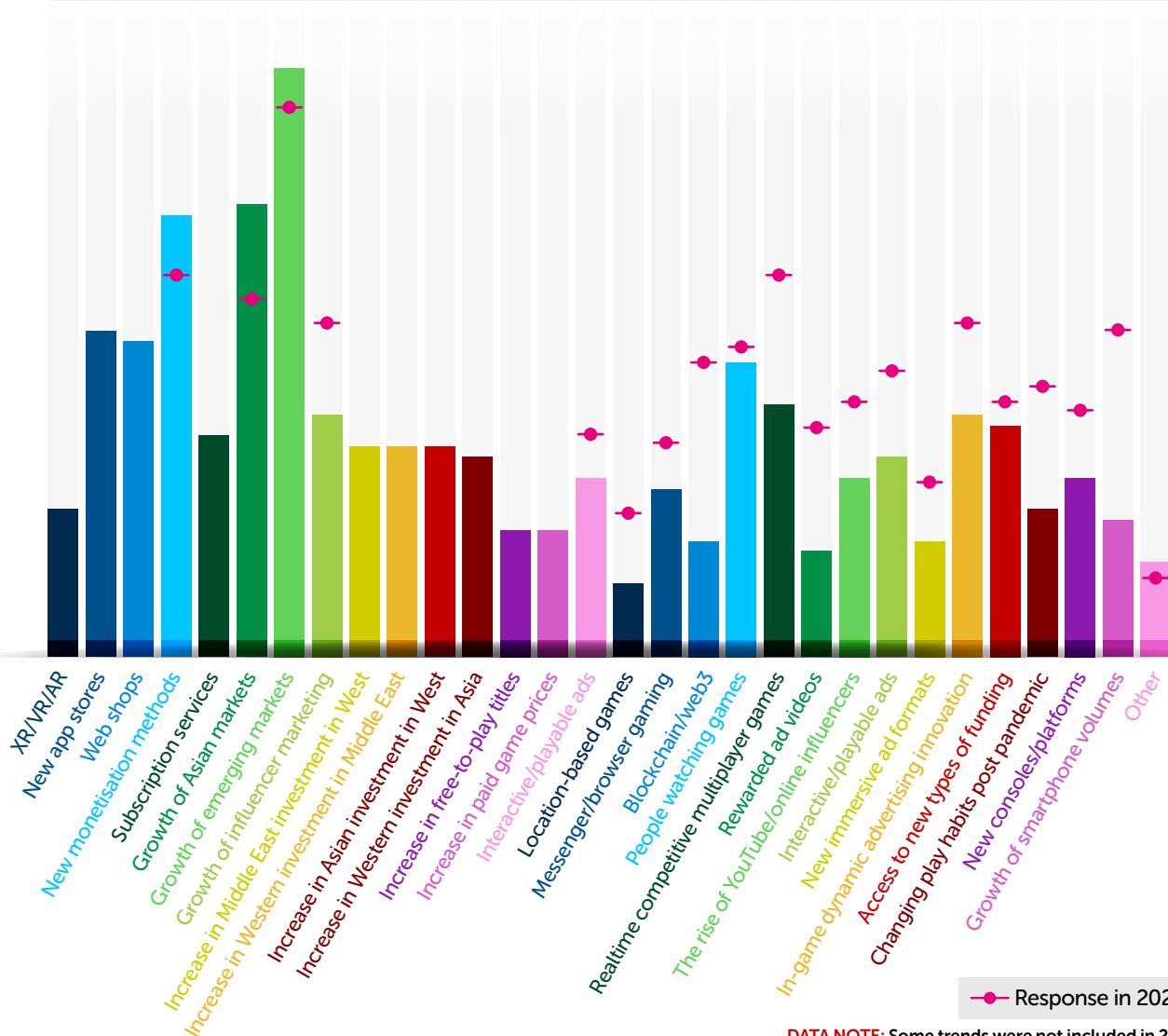
## THREATS

	2024	2021
Competition (amount of releases)	37.3%	42.9%
Non-gaming apps	11.9%	-
Rising UA costs	64.2%	40.1%
Rising marketing costs	44.8%	40.1%
Rising development costs	43.3%	29.4%
Amount of free content	20.2%	26%
Political uncertainty and unrest	15.7%	20.9%
Threat of recession/depression/economic instability	36.6%	21.4%
Piracy	13.4%	14.1%
Ad fraud (fake views, clicks, in-app activity or installs)	27.6%	31.1%
Declining consumer interest	23.1%	14.7%
Price deflation	11.9%	19.8%
OS fragmentation	5.2%	11.9%
App store fragmentation	17.9%	-
Increased focus on privacy	40.3%	-
Changing habits post-pandemic	18.7%	17.5%
Competition from other platforms	11.9%	14.7%
Divestitures/de-consolidation	5.2%	-
Lack of investment	43.3%	-
Skills shortages	6.7%	-
Loss of the iOS IDFA code	-	32.2%
Other	3.7%	5.1%

While rising UA costs is often highlighted as a challenge, a significant 64.2% of respondents highlighted it as one of the biggest threats to the global mobile games business, up from 40.1% in 2021 – reflecting the changes in the privacy and marketing landscape since then.

19

## Where are the key opportunities for the mobile games industry in the year ahead? (Tick all that apply)



DATA NOTE: Some trends were not included in 2021

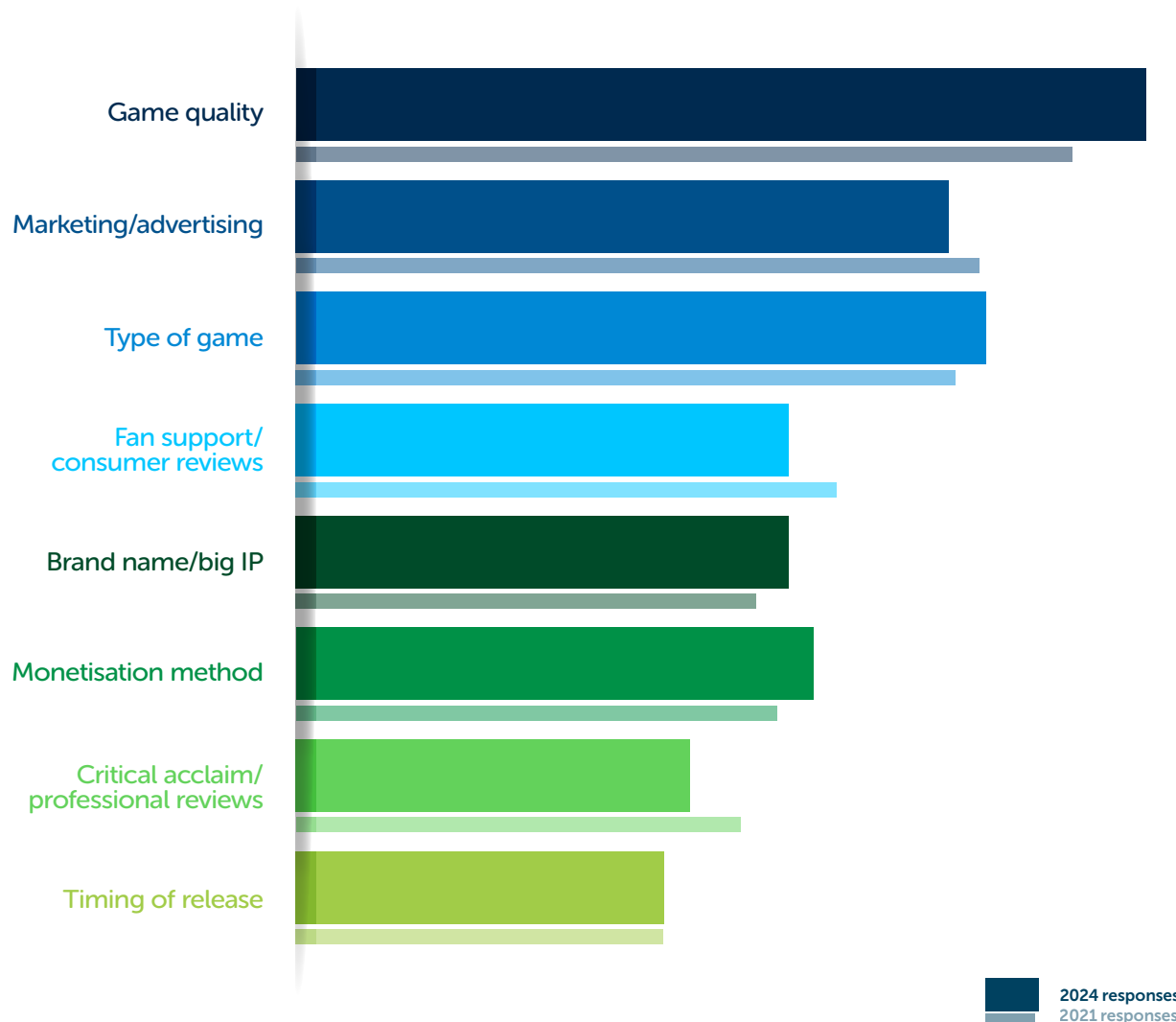
## THE MOBILE GAMES INDUSTRY

### OPPORTUNITIES

	2024	2021
XR/VR/AR	10.5%	-
New app stores	23.1%	-
Web shops	22.4%	-
New monetisation methods	31.3%	27.1%
Subscription services	15.7%	-
Growth of Asian markets	32.1%	25.4%
Growth of emerging markets (Brazil, MENA, Africa, etc)	41.8%	39%
Growth of influencer marketing	17.2%	23.7%
Increase in Middle East investment in Western markets	14.9%	-
Increase in Western investment in Middle East markets	14.9%	-
Increase in Asian investment in Western markets	14.9%	-
Increase in Western investment in Asian markets	14.2%	-
Increase in free-to-play titles	9.0%	-
Increase in paid game prices	9.0%	-
Interactive/playable ads	12.7%	15.8%
Location-based games	5.2%	10.2%
Messenger/browser gaming	11.9%	15.2%
Blockchain/web3	8.2%	20.9%
People watching games	20.9%	22%
Realtime competitive multiplayer games	17.9%	27.1%
Rewarded ad videos	7.5%	15.8%
The rise of YouTube/online influencers	12.7%	18.1%
Interactive/playable ads	14.2%	20.3%
New immersive ad formats (audio/background)	8.2%	12.4%
In-game dynamic advertising innovation	17.2%	23.7%
Access to new types of funding	16.4%	18.1%
Changing play habits following the pandemic	10.5%	19.2%
New consoles/platforms	12.7%	17.5%
Growth of smartphone volumes	9.7%	23.2%
Other (please specify)	6.7%	5.6%

With the emergence of Savvy Games Group, regional governments have been investing heavily in the games and tech sectors, particularly in Saudi Arabia and the United Arab Emirates. That's likely a driving force behind 41.8% of respondents flagging the growth of emerging markets like MENA as a key opportunity for the mobile games industry in 2025.

## 20 Rank the following in terms of their importance when it comes to a game's success.



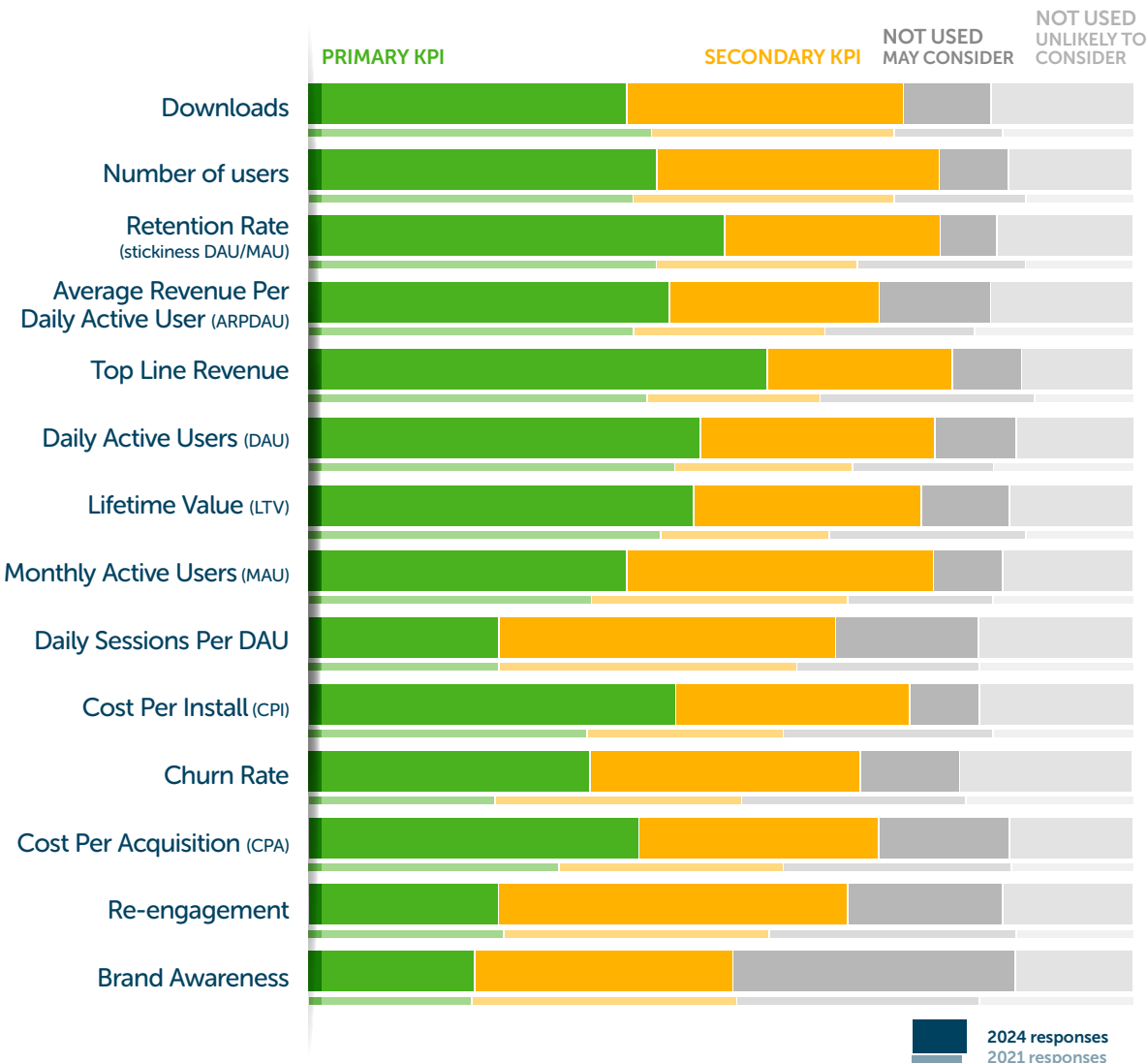
CHOICE	2024	2021
Game quality	6.9	6.3
Marketing/advertising	5.3	5.6
Type of game	5.6	5.4
Fan support/consumer reviews	4.0	4.4
Brand name/big IP	4.0	3.8
Monetisation method	4.2	3.9
Critical acclaim/professional reviews	3.2	3.6
Timing of release	3.0	3.0

For all the challenges and changes the games industry has faced over the past few years since our last report, there was very little change in what our respondents thought about the factors most important to a game's success.

Game quality was, of course, cited as the leading element when it comes to a game's success, followed by marketing/advertising and type of game. Timing of release ranked lowest in importance, likely owing to the majority of respondents hailing from the mobile sector, rather than console and PC.

21

Thinking of your promotion and marketing over the next year, what are your KPIs and how might they change in future?



## KPI

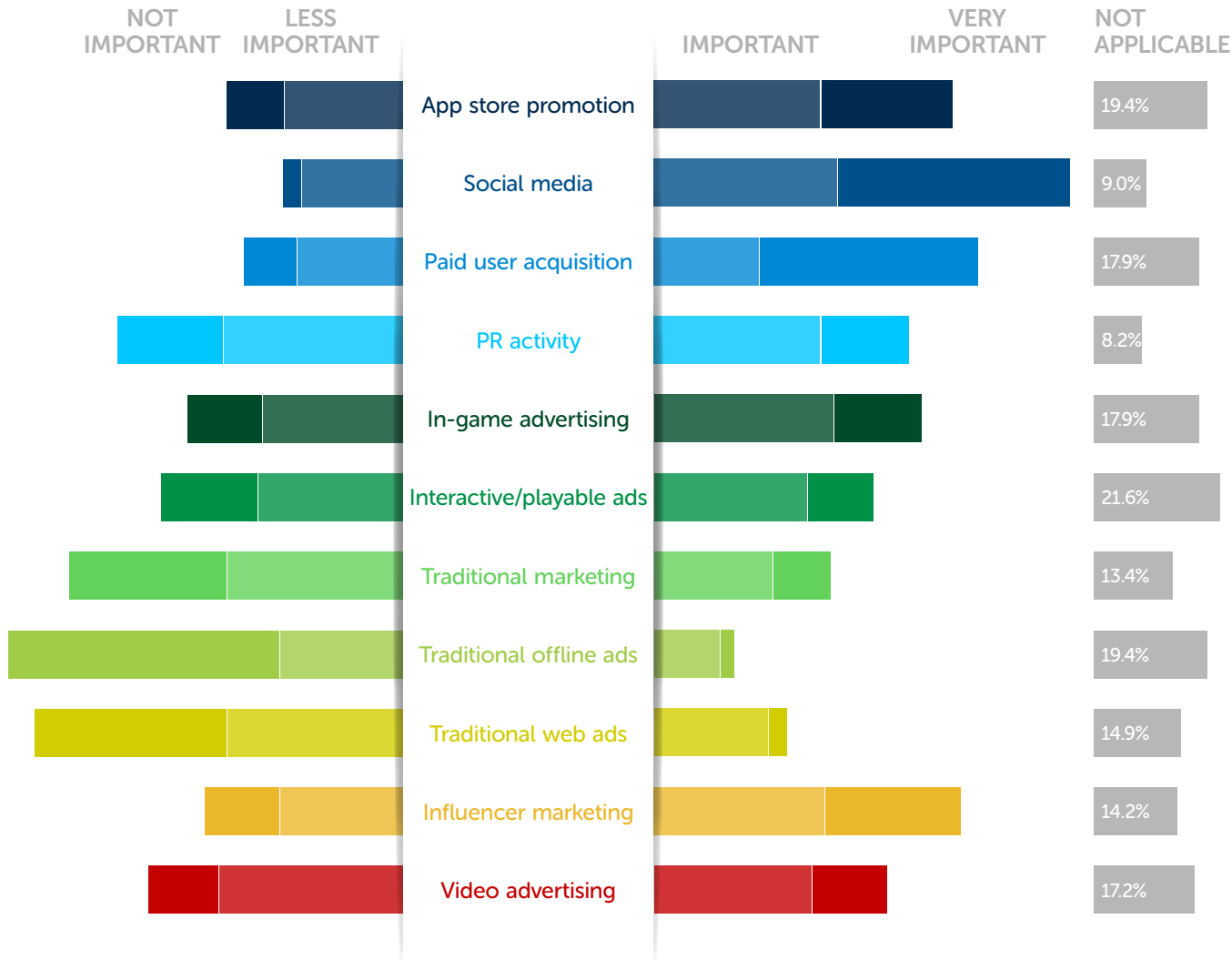
	PRIMARY KPI	SECONDARY KPI	NOT USED MAY CONSIDER	NOT USED UNLIKELY TO CONSIDER
Downloads	38.8%	33.6%	10.5%	17.2%
Number of users	42.5%	34.3%	8.2%	14.9%
Retention Rate (Stickiness DAU/MAU)	50.8%	26.1%	6.7%	16.4%
Average Revenue Per Daily Active User (ARPDau)	44%	25.4%	13.4%	17.2%
Top line revenue	56%	22.4%	8.2%	13.4%
Daily Active Users (DAU)	47.8%	28.4%	9.7%	14.2%
Lifetime Value (LTV)	47%	27.6%	10.5%	14.9%
Monthly Active Users (MAU)	38.8%	37.3%	8.2%	15.7%
Daily Sessions per DAU	23.1%	41%	17.2%	18.7%
Cost Per Install (CPI)	44.8%	28.4%	8.2%	18.7%
Churn Rate	34.3%	32.8%	11.9%	20.9%
Cost Per Acquisition (CPA)	40.3%	29.1%	15.7%	14.9%
Re-engagement	23.1%	42.5%	18.7%	15.7%
Brand Awareness	20.2%	31.3%	34.3%	14.2%

If you work in the mobile games business, you've heard of key performance indicators (KPIs) and you'll know all the terms. As much as game quality was highlighted as the most important aspect for a game's success in Question 20, working with data is also a critical element to longevity.

Top line revenue was cited as the primary KPI (56%), while 50.8% said retention rate, and 47.8% highlighted daily active users. Brand awareness ranked the lowest in terms of primary KPIs, with only this, re-engagement and daily sessions per DAU rated below 30%.

22

## How do you plan to grow your audience over the next 12 months?



REGION	NEGATIVE RESPONSE	POSITIVE RESPONSE
App store promotion	29.9%	50.8%
Social media	20.2%	70.9%
Paid user acquisition	26.9%	55.2%
PR activity	48.5%	43.3%
In-game advertising	36.6%	45.5%
Interactive/playable ads	41.1%	37.3%
Traditional marketing	56.7%	29.9%
Traditional offline ads	67.2%	13.4%
Traditional web ads	62.7%	22.4%
Influencer marketing	33.6%	52.2%
Video advertising	43.3%	39.6%

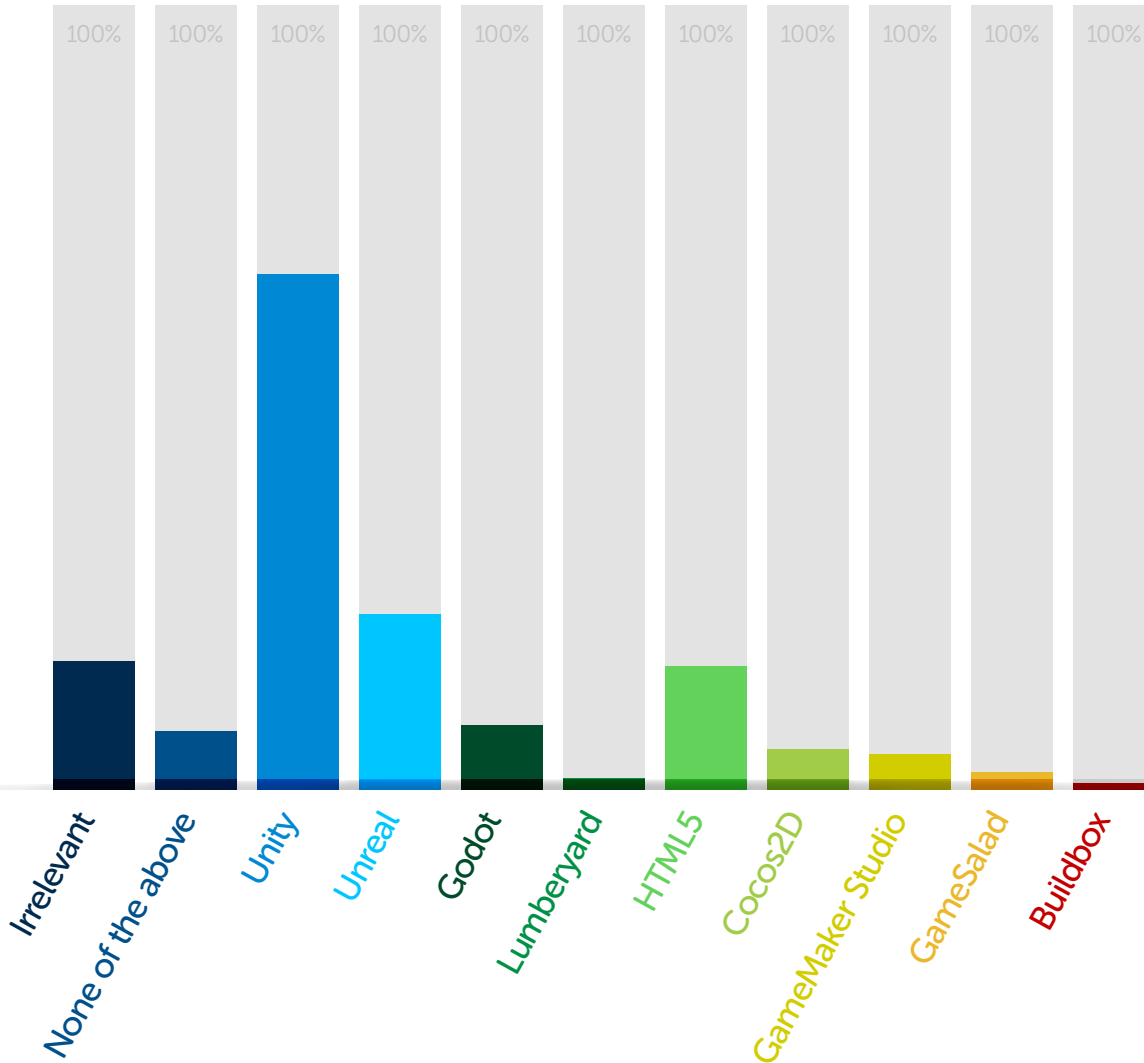
Game quality is a critical factor to a game's success (see Question 20), but if no one hears about it, no one will play it.

When it comes to growing audiences, social media came out on top with the most positive responses (70.9%), above paid user acquisition (55.2%) and influencer marketing (52.2%).

Traditional offline ads and web ads were seen by the majority of respondents as less important or not important. PR activity received a mixed response, with 48.5% seeing it as less or not important, and 43.3% saying it was important or very important.

23

If you are a developer, which game engine(s) do you develop for now? (Tick all that apply)



## CHOICES

## 2024 RESPONSES

Irrelevant/Not a developer	16.4%
None of the above	7.5%
Unity	65.7%
Unreal	22.4%
Godot	8.2%
Lumberyard	1.5%
HTML5	15.7%
Cocos2D	5.2%
GameMaker Studio	4.5%
GameSalad	2.2%
Buildbox	0.8%
In-house/self-developed engine	9.0%

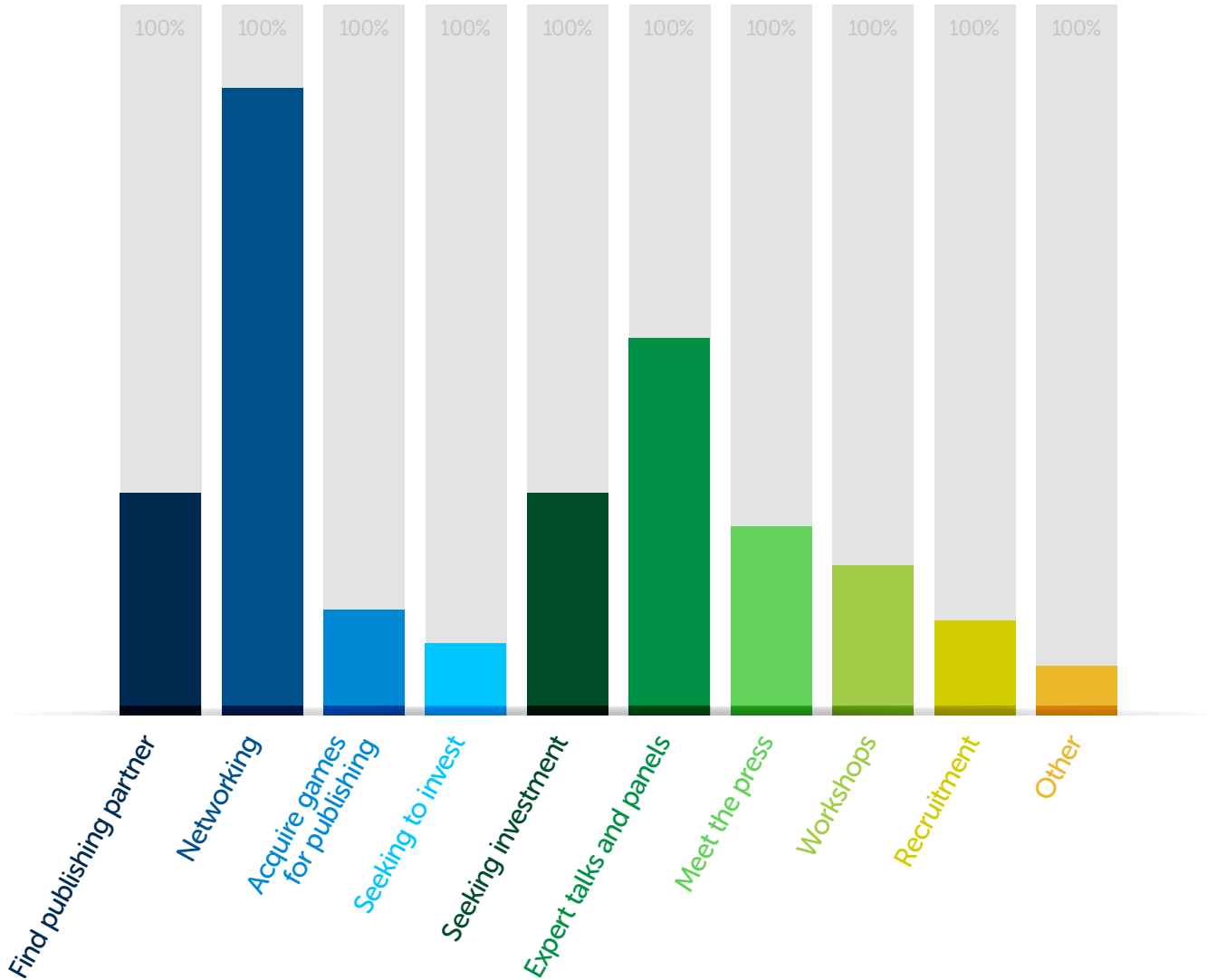
It's safe to say Unity has gone through a difficult period since it announced the controversial and widely criticised Runtime Fee, which has now been scrapped by new CEO Matthew Bromberg. But the game engine is still pervasive in mobile, with 65.7% of developers stating they use the tech for their games.

It remains far and away the leader in the market, with 22.4% developing with rival Unreal Engine, while emerging competitor Godot has been used by 8.2%.

24

What’s the key reason(s) for you to attend industry events?

(Tick all that apply)



CHOICES	2024 RESPONSES
Find publishing partner	31.3%
Networking	88.3%
Acquire games for publishing	14.8%
Seeking to invest	10.2%
Seeking investment	31.3%
Expert talks and panels	53.1%
Meet the press	26.6%
Workshops	21.1%
Recruitment	13.3%
Other	7.0%

There is no shortage of games industry events taking place regularly around the world. We have our own, of course, with 2025's line-up: Pocket Gamer Connects London (Jan 20th–21st), San Francisco (Mar 17th–18th), Dubai May 7th–8th, Barcelona (Jun), Helsinki (Oct 7th–8th), and Aqaba (Nov). (Plus a couple of PGC Summits TBA.)

The key reasons people attend events? Networking is the clear winner at 88.3%, followed by expert talks and panels (53.1%), seeking investment (31.3%), and finding a publishing partner (31.3%).



[www.PocketGamer.biz](http://www.PocketGamer.biz)

## Contacts

EDITORIAL

**Craig Chapple**

Head of Content, PocketGamer.biz

**Email:** [craig.chapple@steelmedianetwork.com](mailto:craig.chapple@steelmedianetwork.com)

**Linkedin:** [linkedin.com/in/craigchapple](https://www.linkedin.com/in/craigchapple)

ADVERTISING

**Lisa Bisset**

VP of Business Development (Global)

**Email:** [lisa.bisset@steelmedianetwork.com](mailto:lisa.bisset@steelmedianetwork.com)

**Skype:** lambisset