

Mobile Gaming 2022-2024



- Data for Mobile Gaming 2022-2024
- in-app and in-game advertising
- trends in mobile gaming categories
- shifts in top Mobile Gaming countries
2022-2024

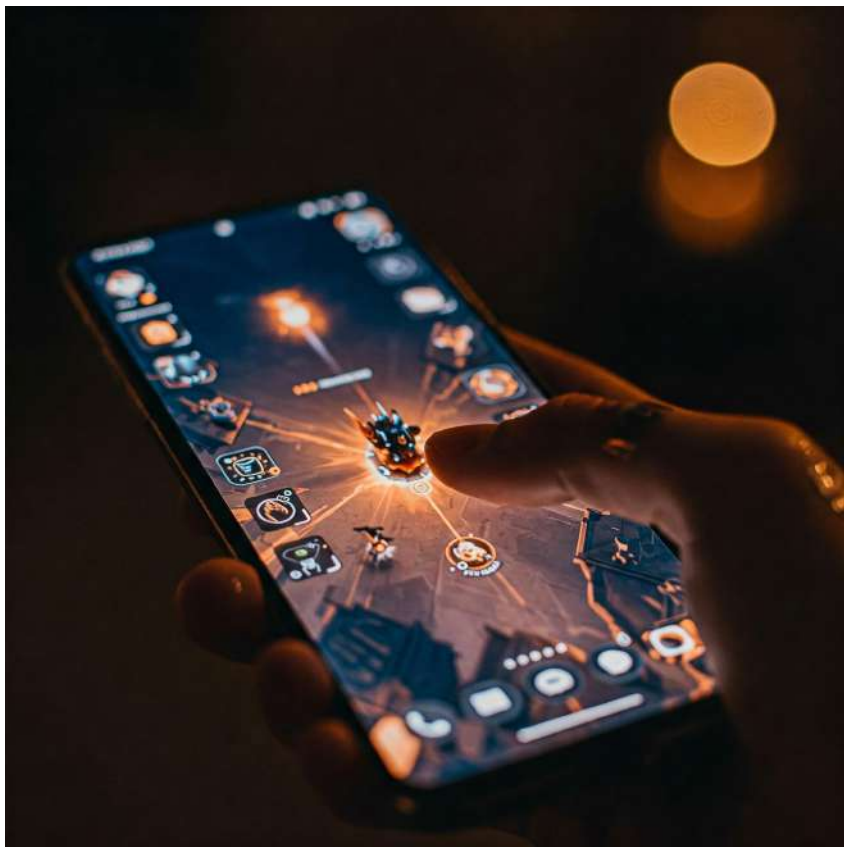
Mariusz Gasiewski
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Executive summary

- Majority of gamers play games on smartphones. Most of new gamers will be playing on Mobile
- There is no danger that gaming will go away. Even very young still users play games
- Users have the preference for free-to-play games, family recommendations, games with good ratings
- Most of new smartphone users will be in Emerging Markets
- In-game advertising is important part of mobile gaming revenue in many countries. It grows faster than in-app purchases.
- Revenue is growing faster than downloads in Mobile Gaming (both in Android and iOS)
- 2024 was very good year for iOS. Mobile gaming was growing faster on iOS than on Android
- In Gaming categories that have strong importance and high growth rates are: Board, Action, Strategy, Puzzle



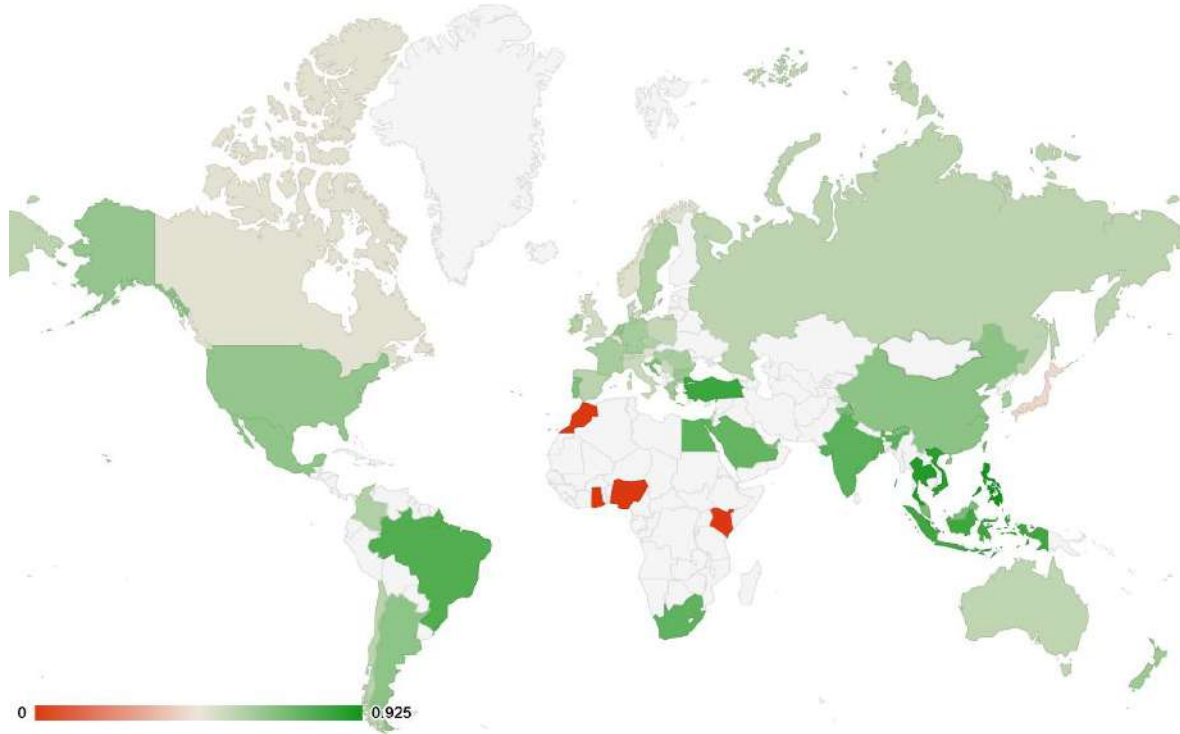


Mobile gaming

(general info)

Gaming is huge. Majority of users play on smartphones.

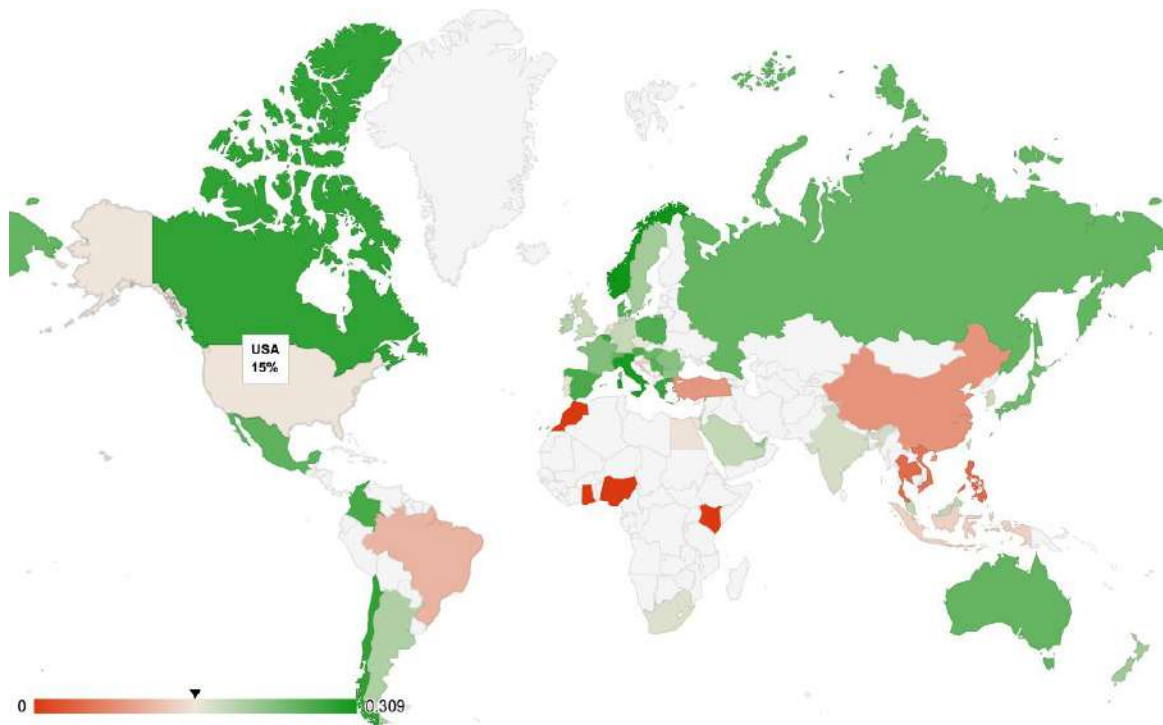
Share of internet user who use smartphones to play games?



Source: GWI, Q3 2024

Gaming is huge

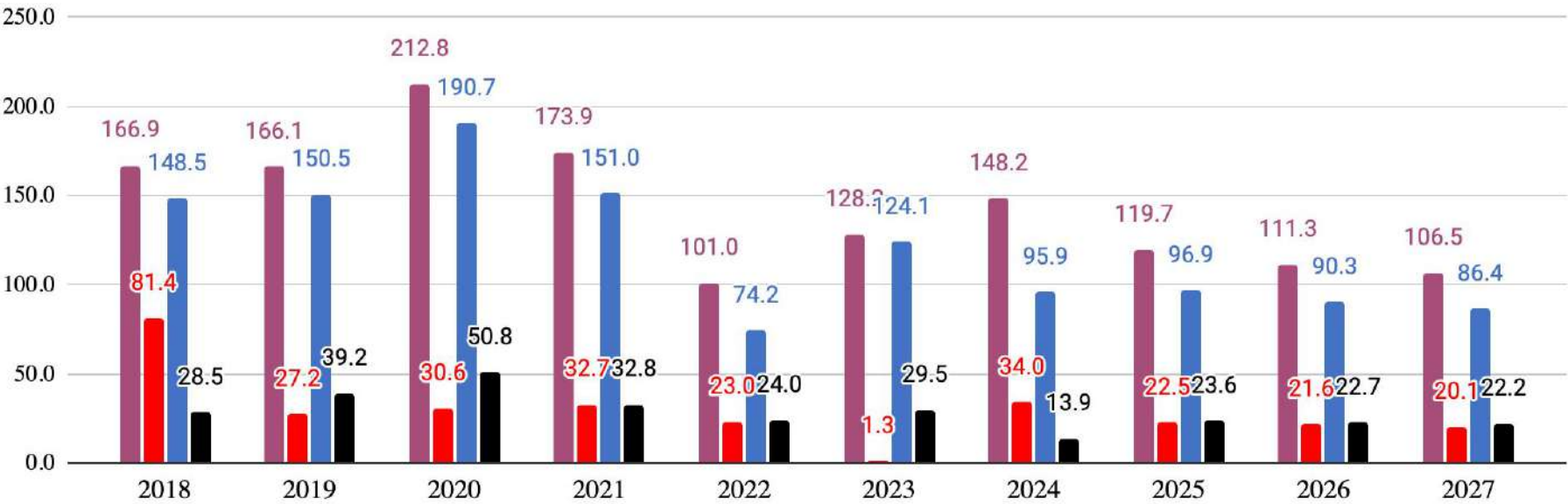
Share of internet user who are playing games on other devices (ie. laptop, tablet, console), although not smartphone



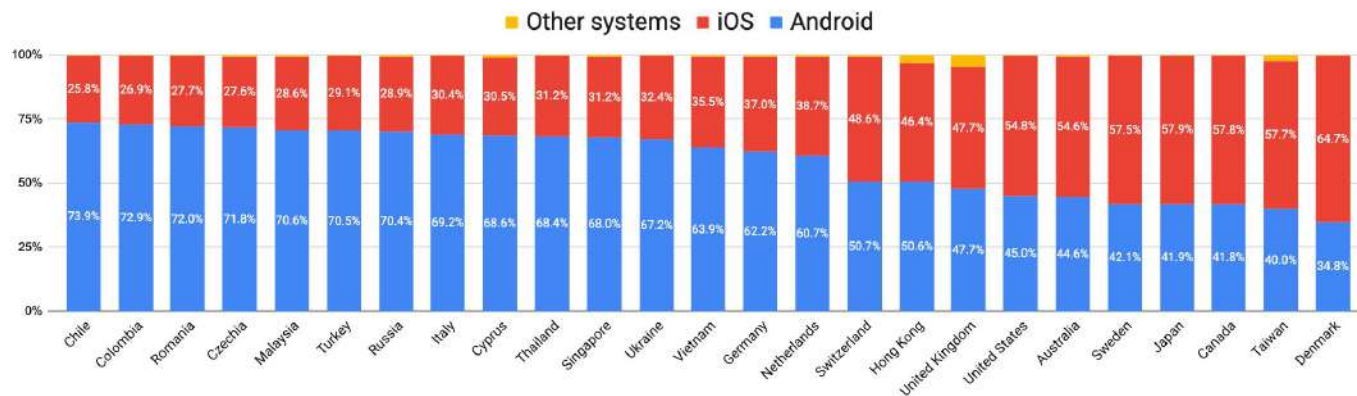
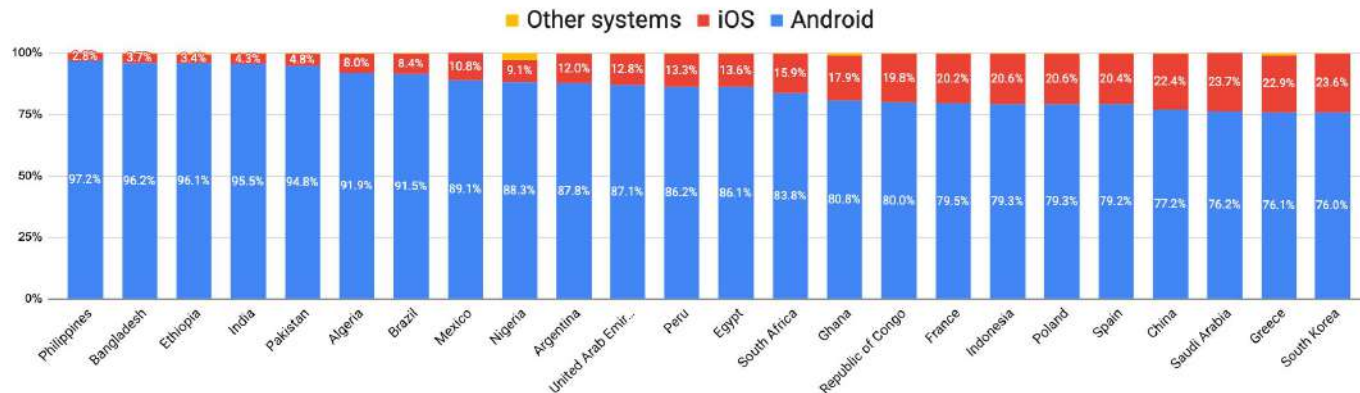
Most of new users will come from Mobile

New users (in mln users)

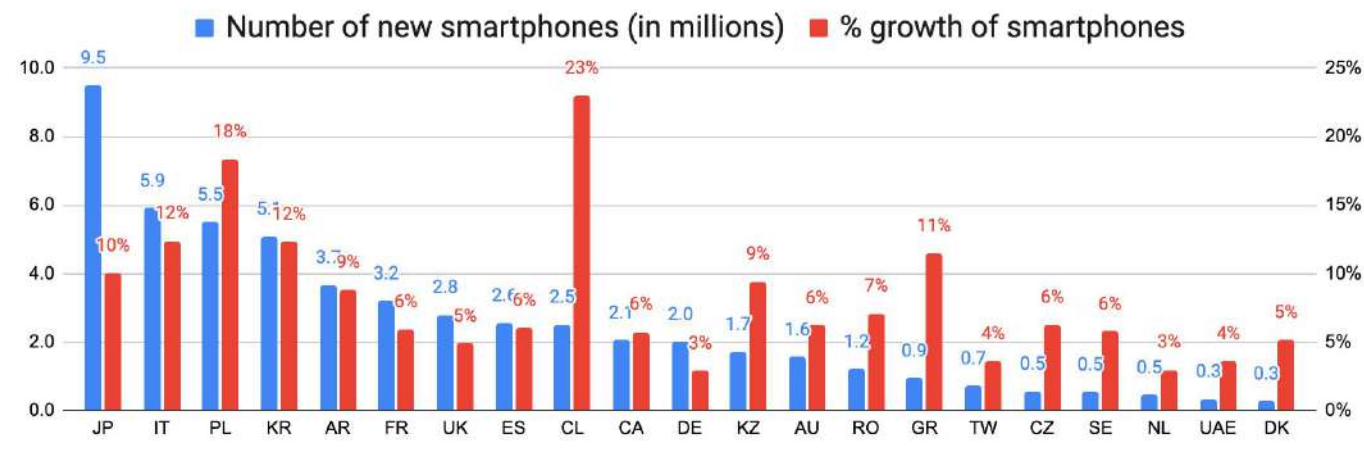
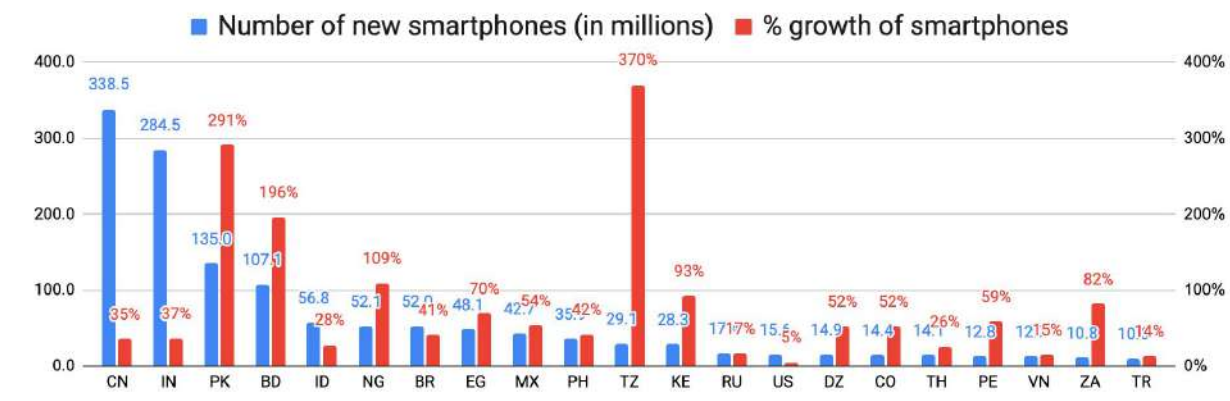
■ Total ■ PC ■ Mobile ■ Console



Mobile operating system market share based on share of traffic



Smartphones in 2024 vs 2029 (net new smartphones, growth of it between 2024 and 2029)



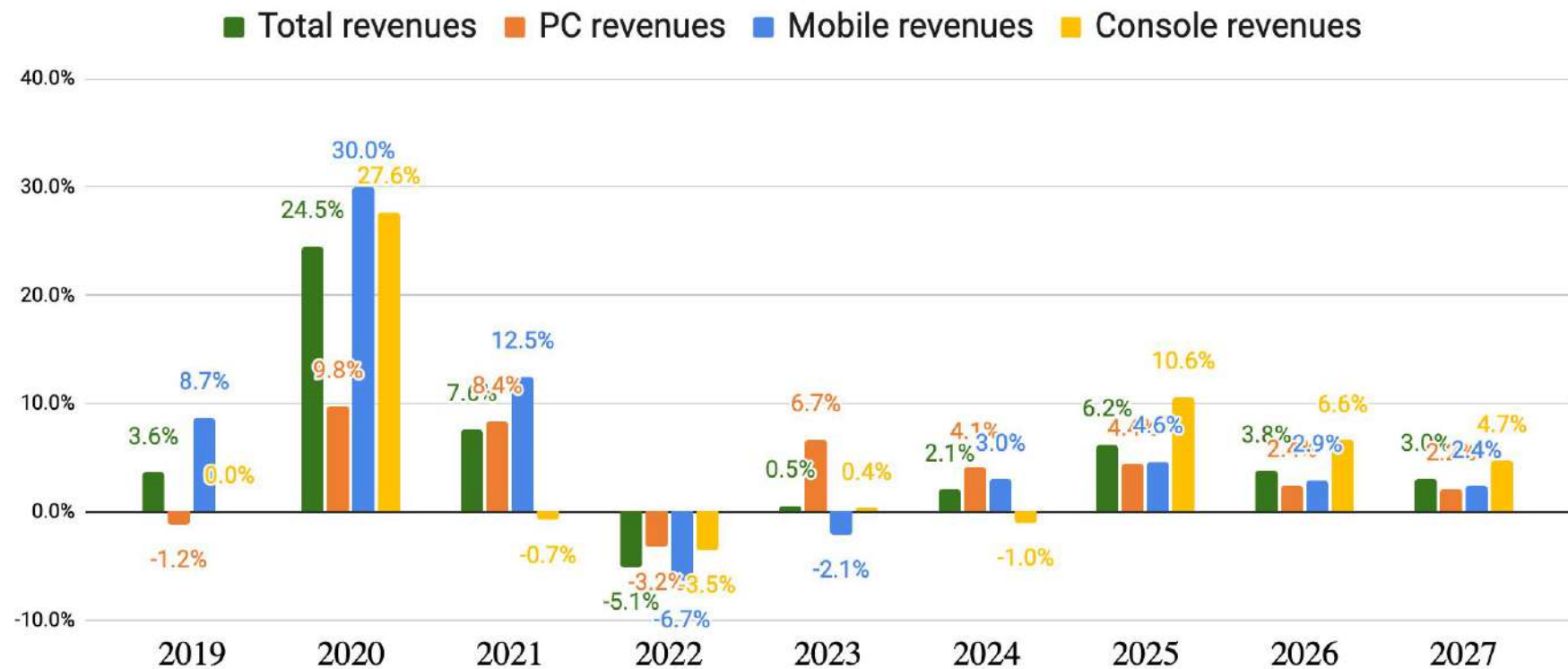


Mobile gaming business

(in general data)

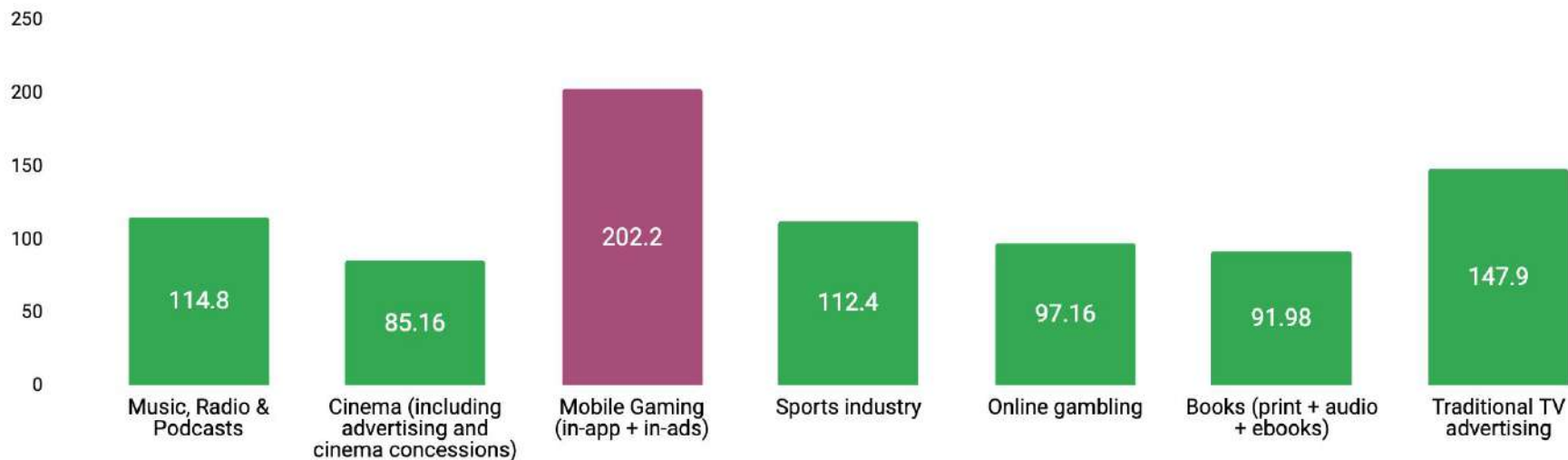


All types of gaming will have some growth in the next years

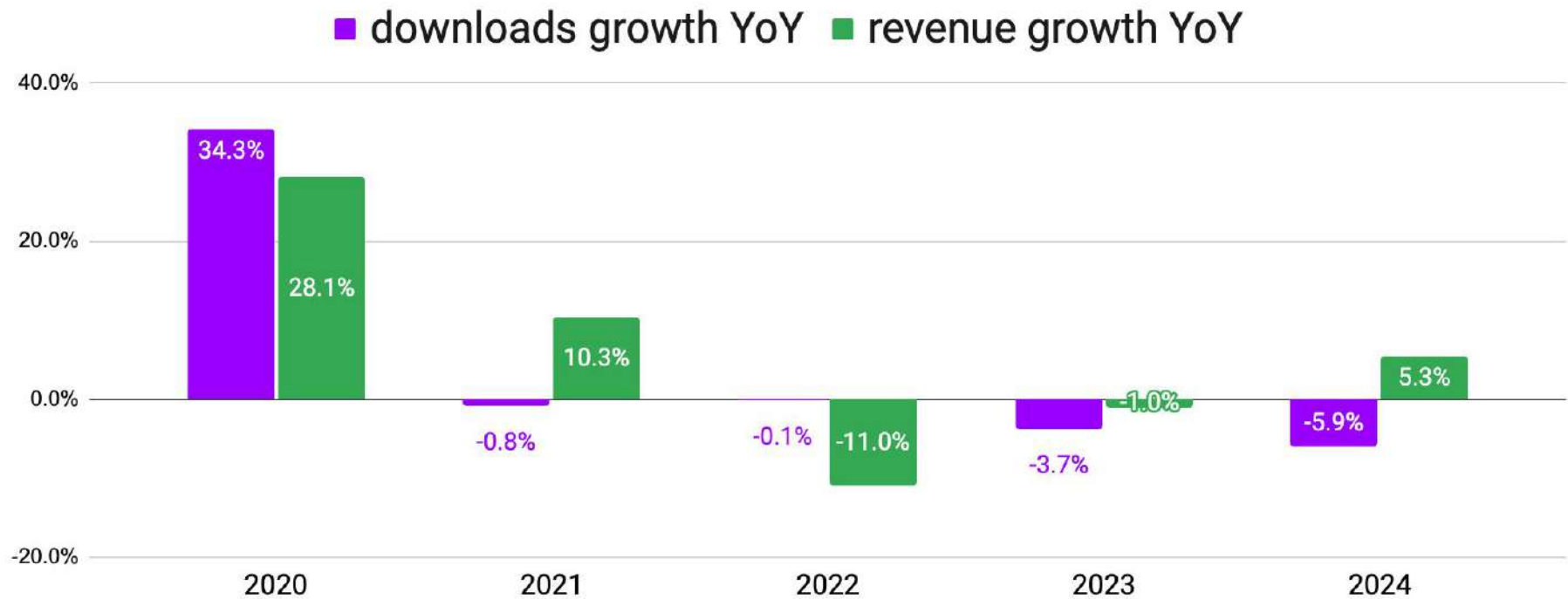


You can see how mobile gaming is huge once you compare it with other area...

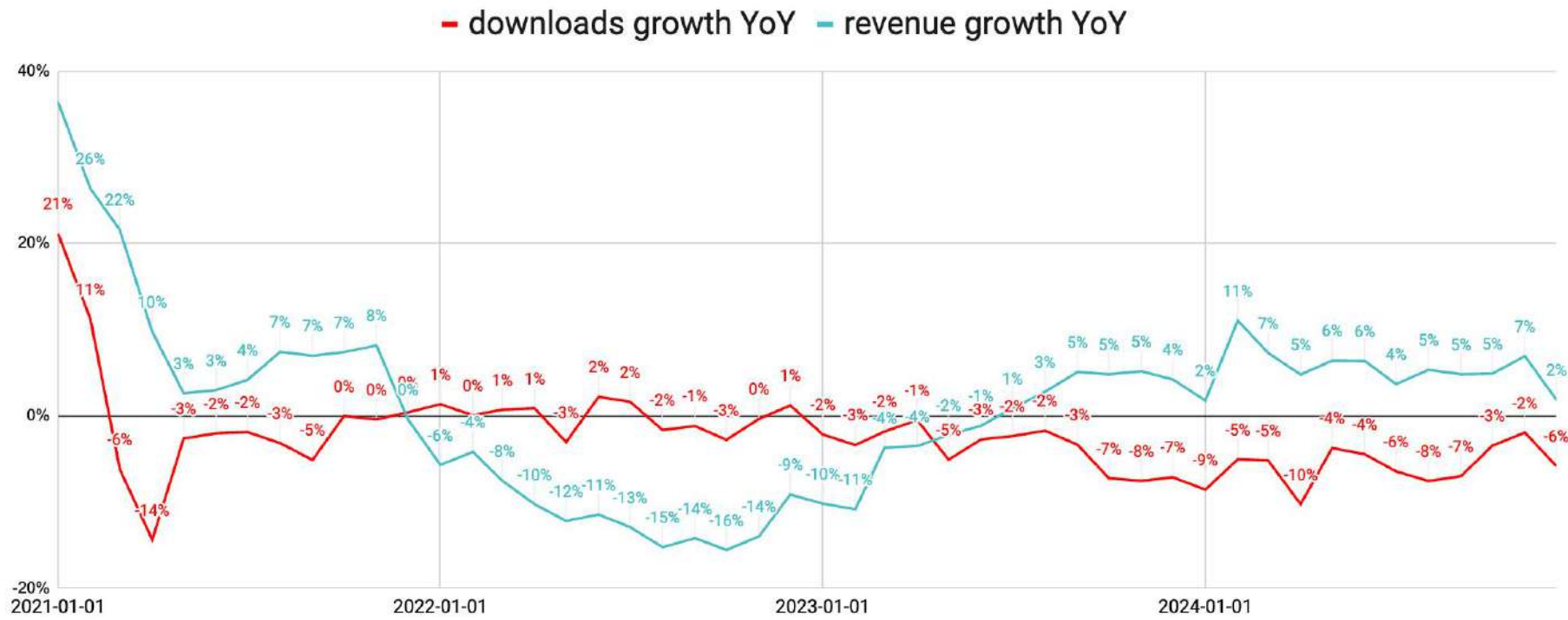
Estimation for values of different business areas in Bn \$, worldwide



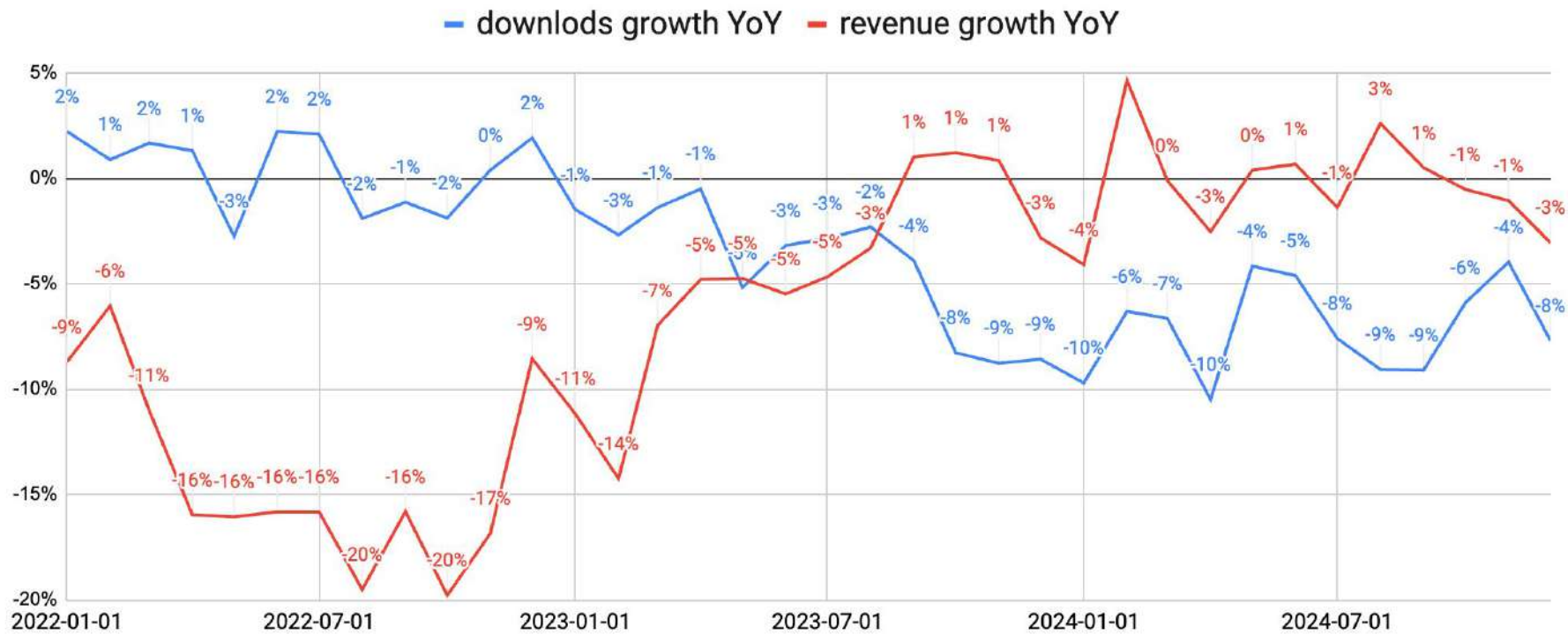
Mobile gaming growth (Android + iOS, excluding China)



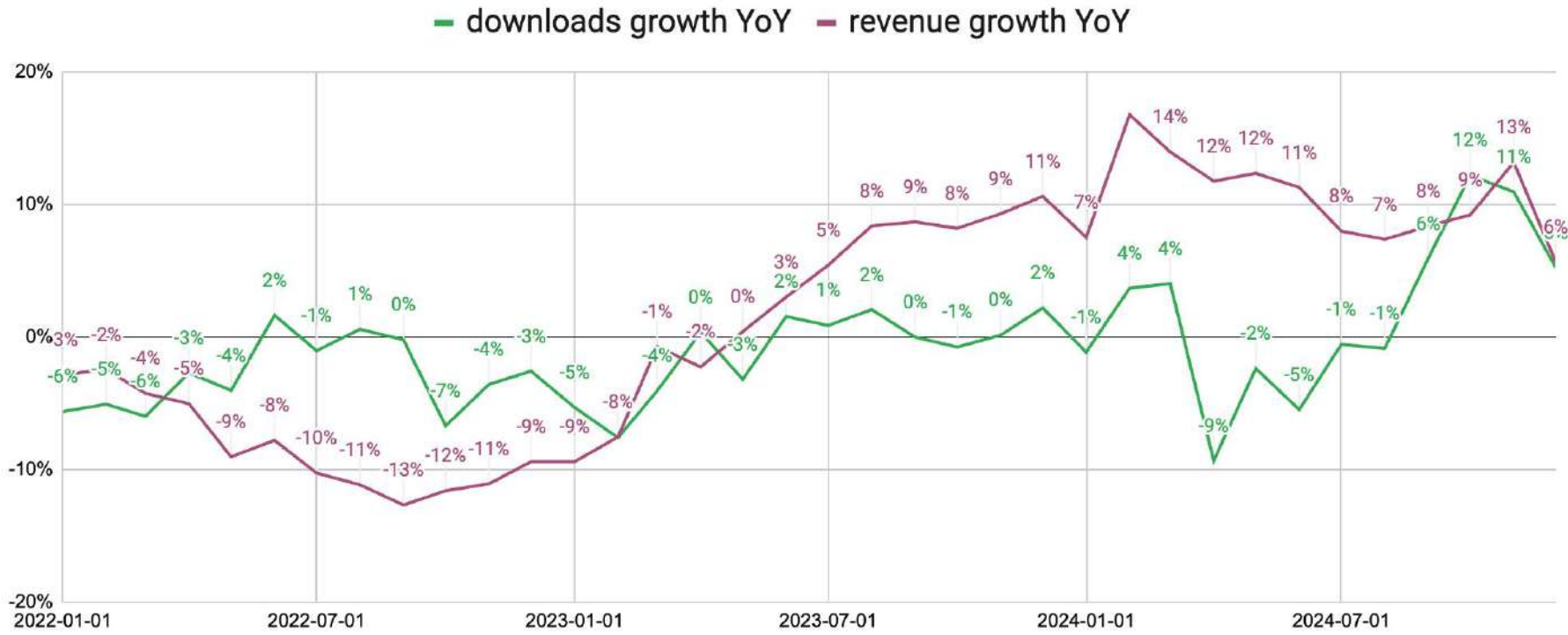
Mobile gaming growth (Android + iOS, excluding China)



Mobile gaming on Android

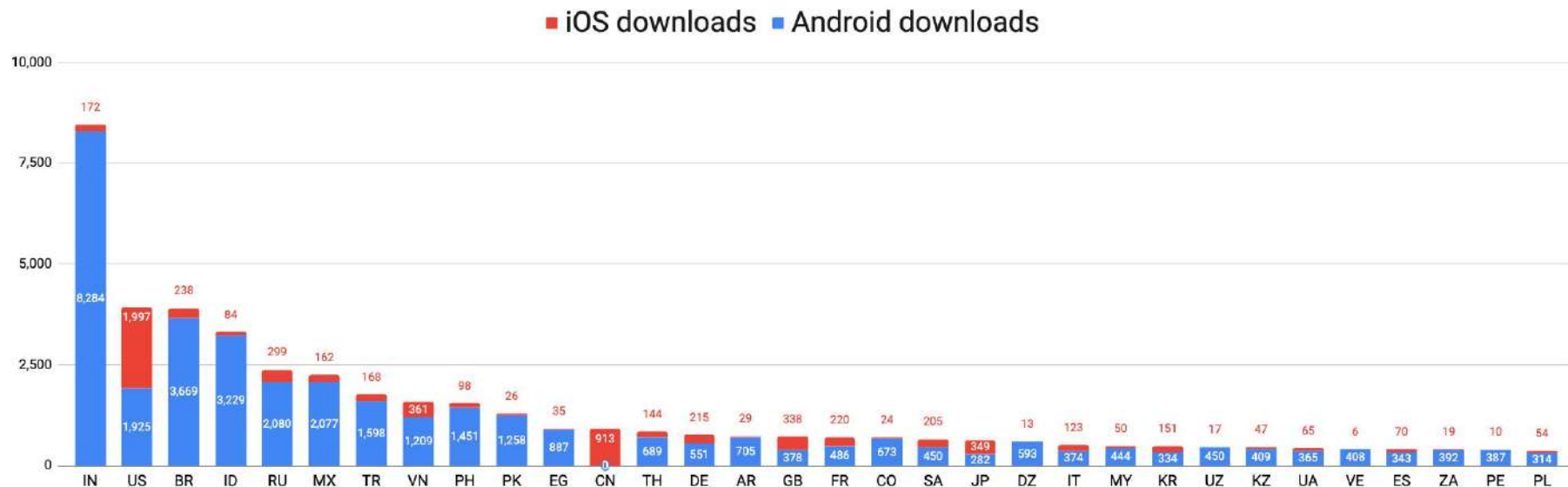


Mobile gaming on iOS (excluding China)



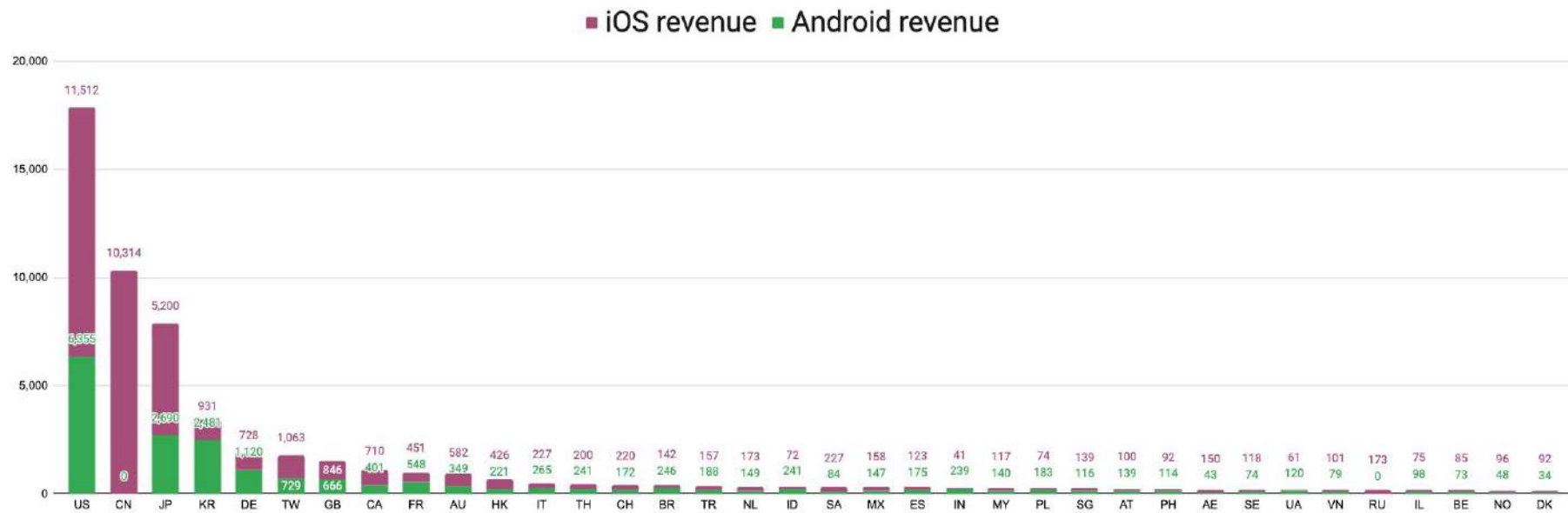
India is the biggest country in the world by number of downloads in Mobile Gaming

Downloads in Mobile Gaming (in mln downloads)



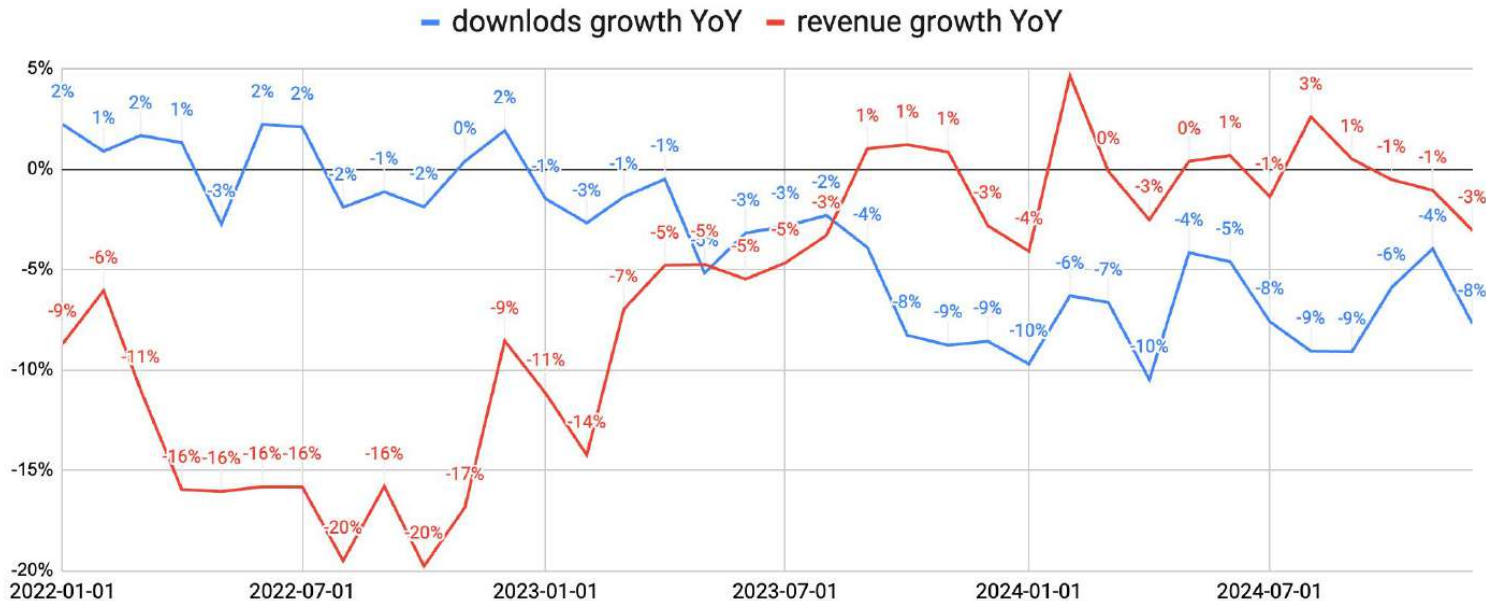
...although at the same time US i China are still the biggest by size of in-app and subscriptions

In-app/subscriptions revenue in Mobile Gaming (in mln USD)



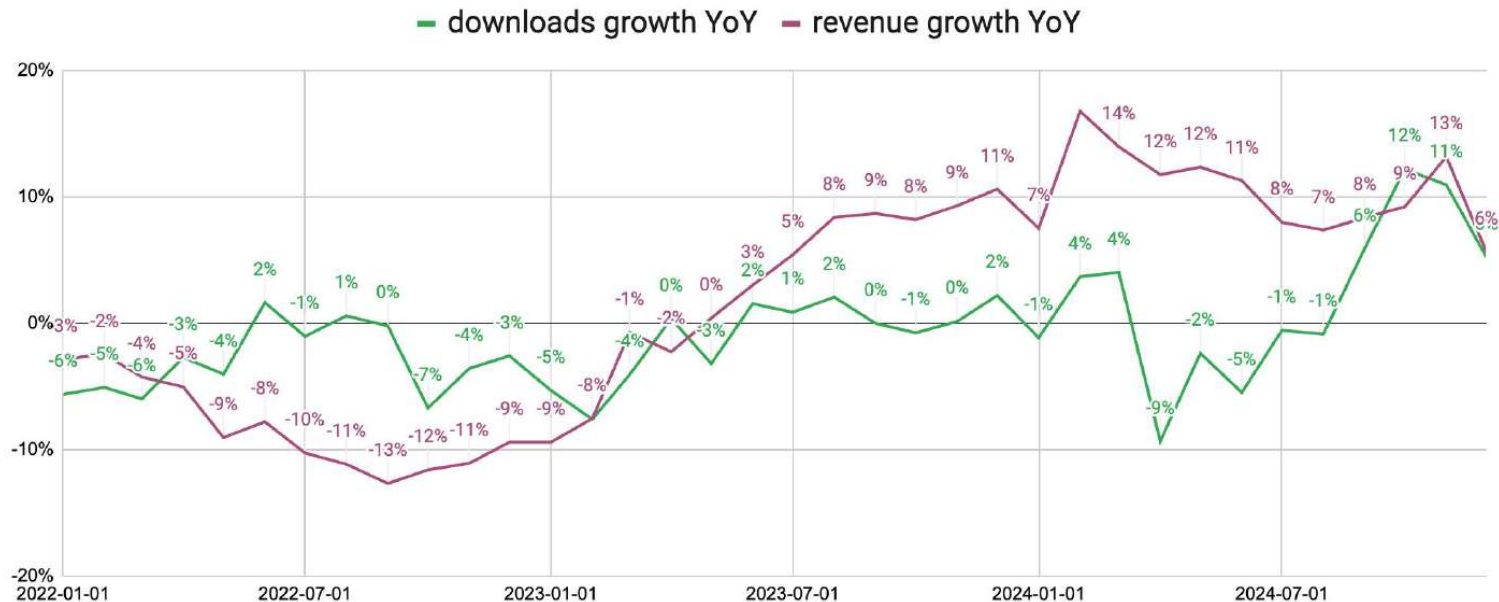
Revenue is growing faster than downloads in Mobile Gaming (Google Play)

Mobile Gaming on Google Play/Android



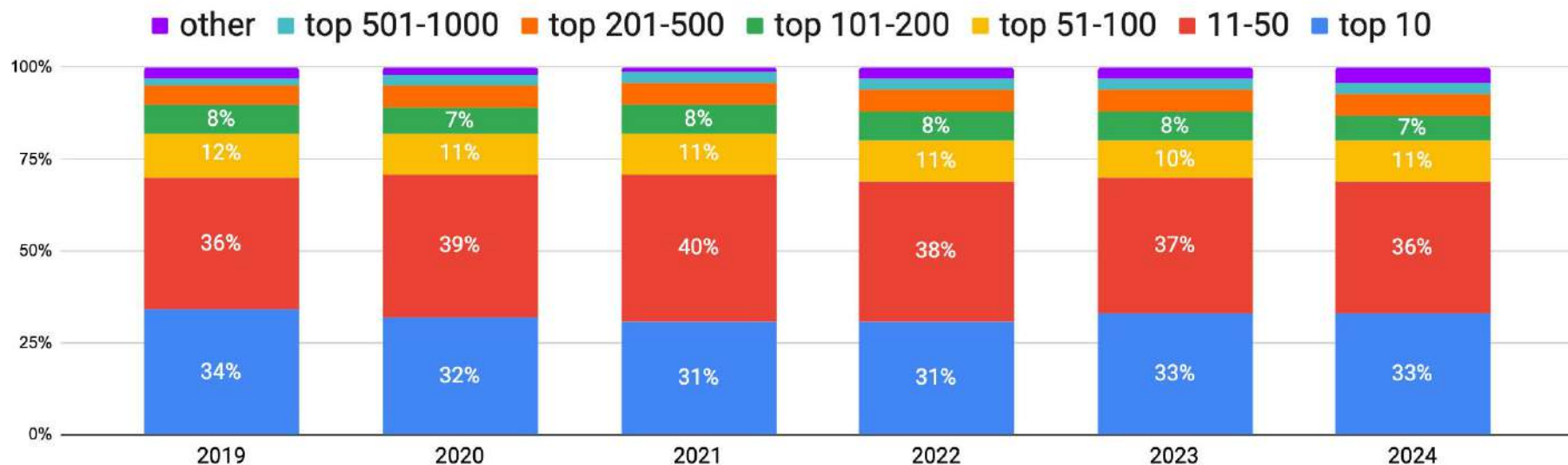
...with similar case in Mobile Gaming on iOS

Mobile Gaming on iOS/Apple Store



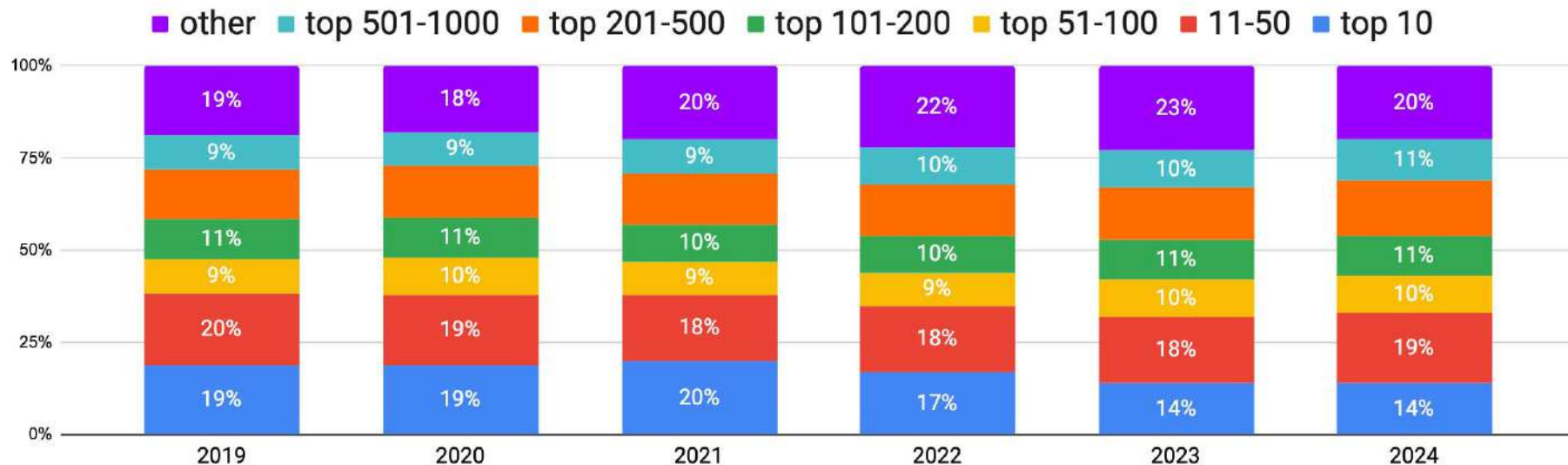
Concentration in revenue among top publishers is not really growing heavily...

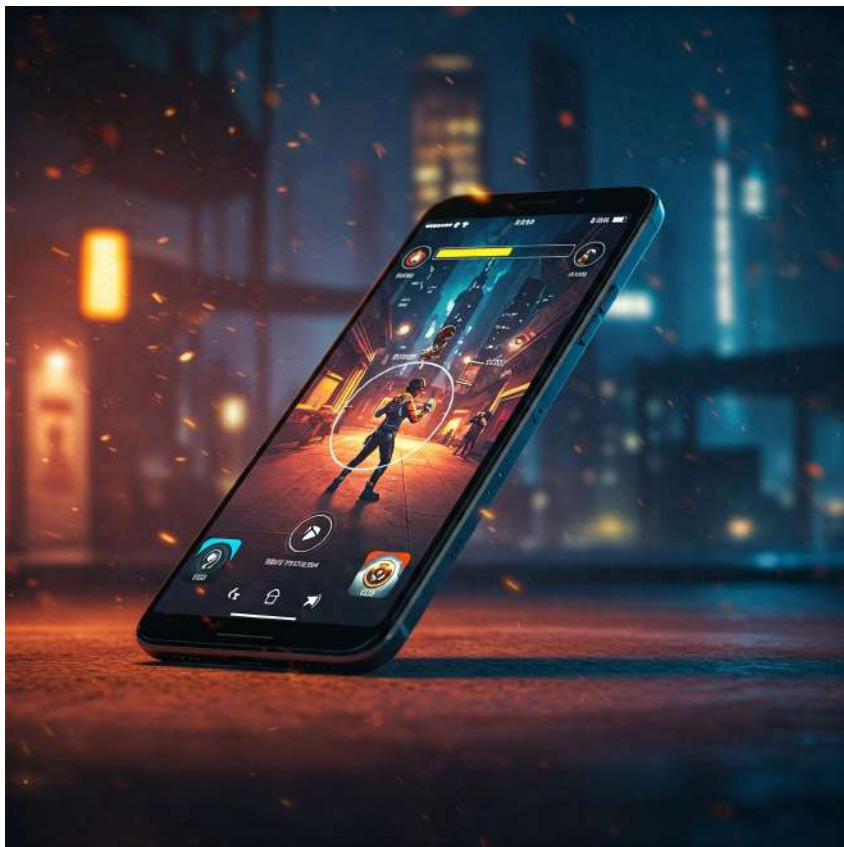
Share of worldwide in-app/subscriptions revenue taken by top publishers



Concentration in downloads is getting even lower over years

Share of worldwide downloads taken by top publishers



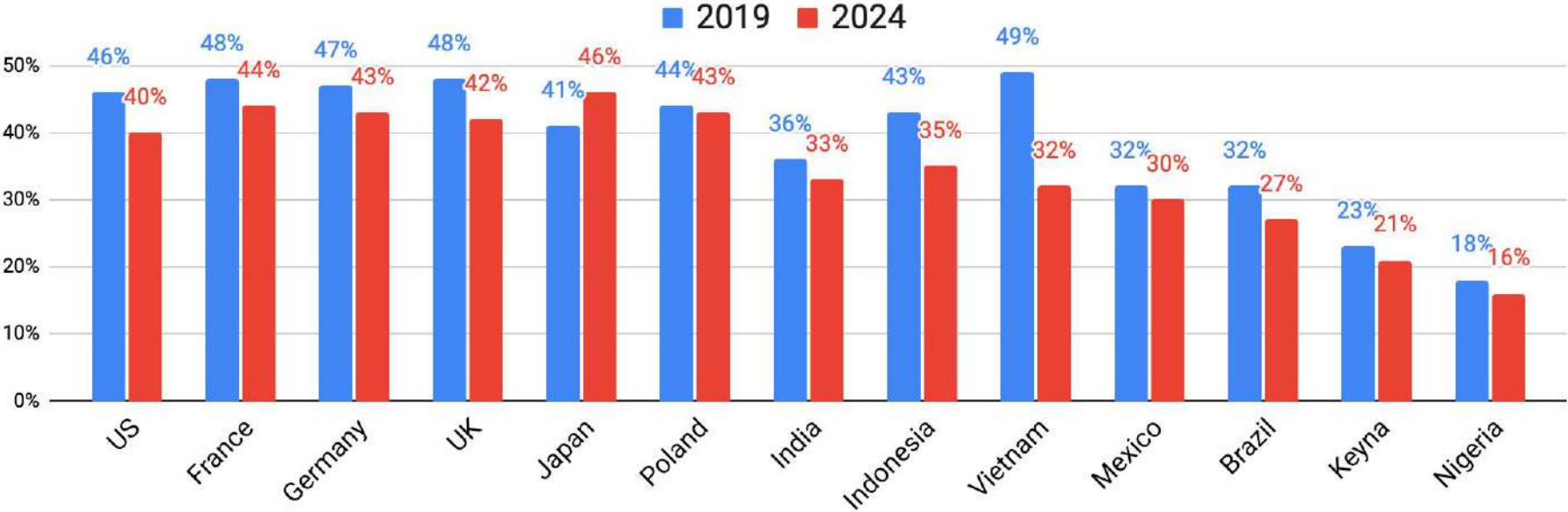


In-app and in-game advertising

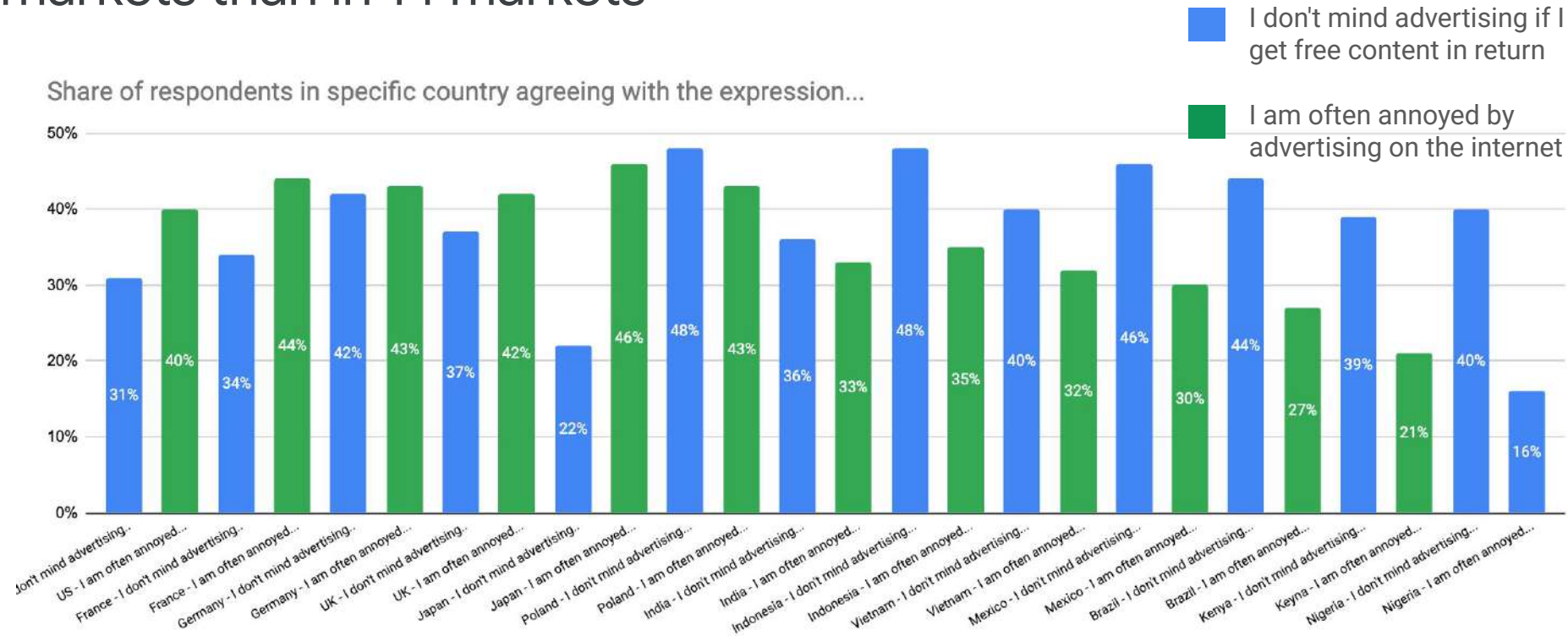


Attitudes towards online advertising is not going more negative over time...

Share of respondents agreeing with the expression: "I am often annoyed by advertising on the internet"

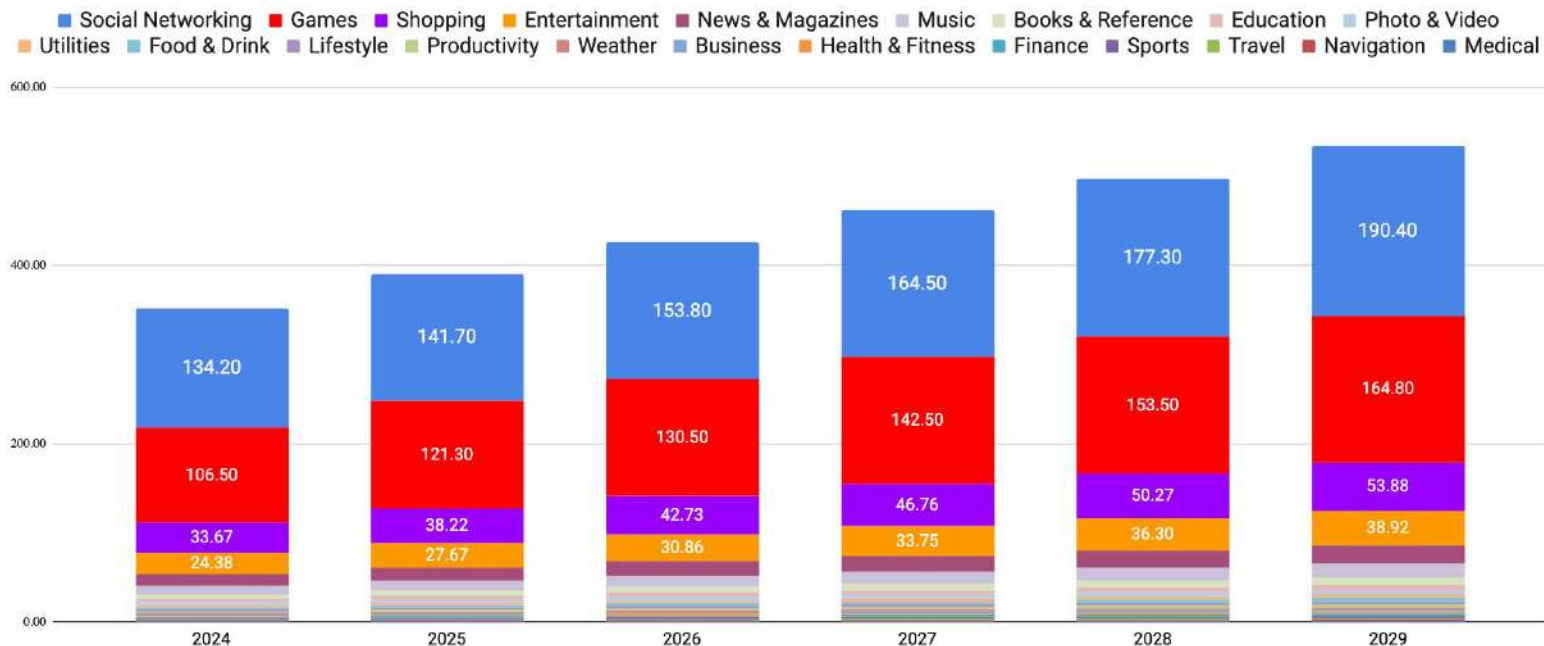


Attitudes towards online advertising is much better in Emerging markets than in T1 markets



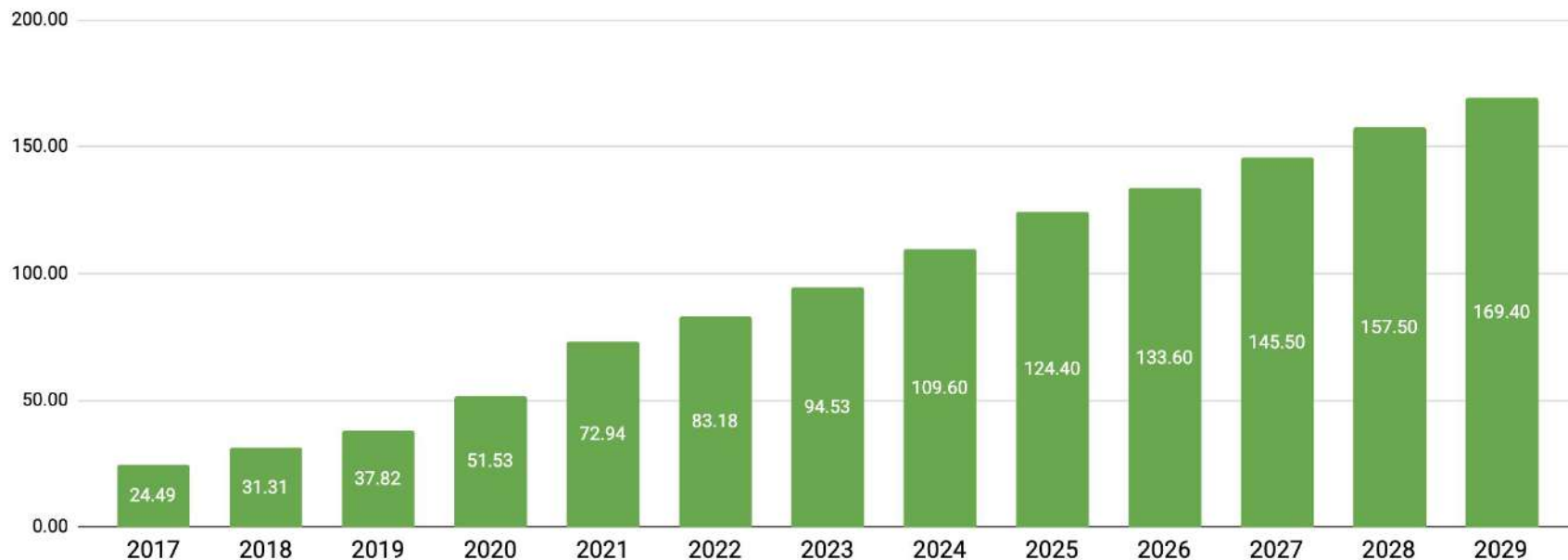
In-app advertising business is growing fast. Gaming is one of biggest parts of in-app advertising.

In-app advertising in billion USD (US\$), estimation for worldwide data



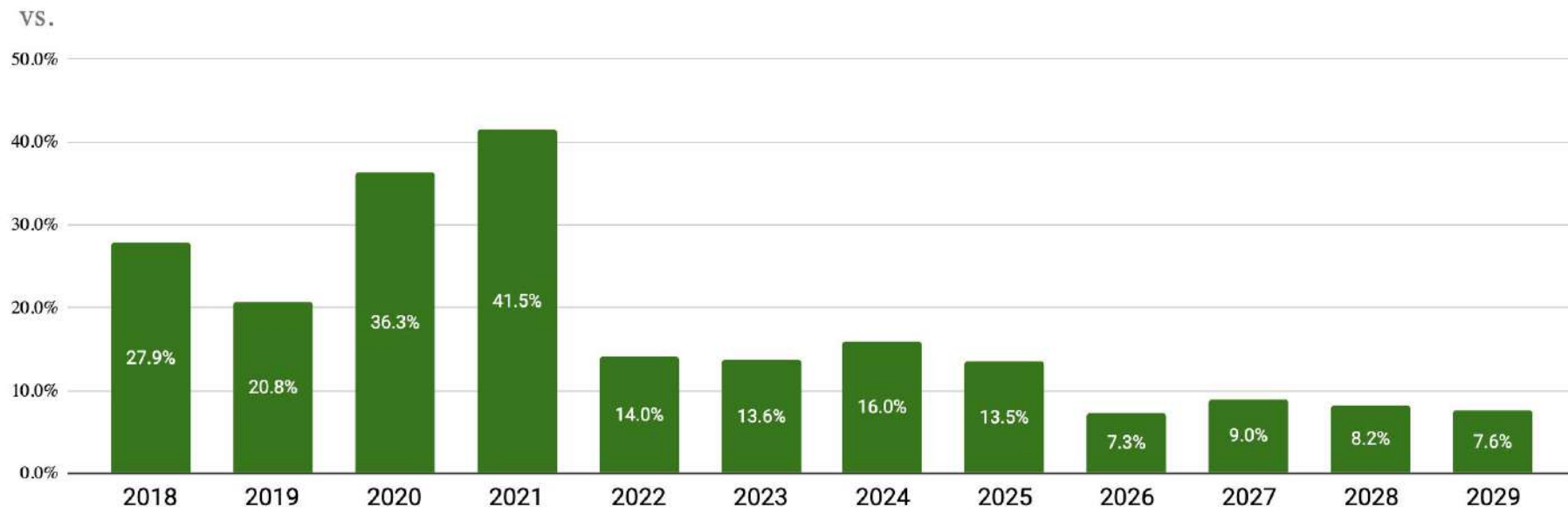
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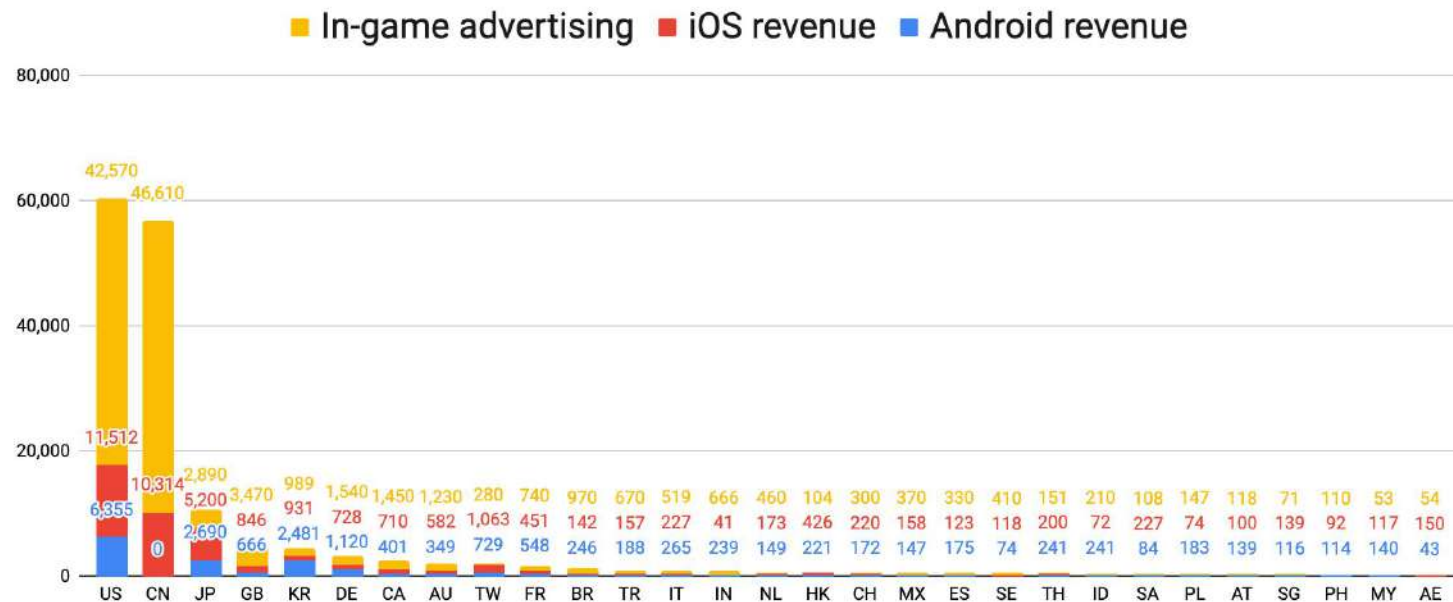
In-app advertising business is growing fast.

Growth of in-app advertising, estimation for worldwide data



In-game advertising is significant part of gaming revenue in many countries

In-game advertising revenue vs in-app/subscription revenue





Gaming categories

(what changed in iOS and Google Play?)



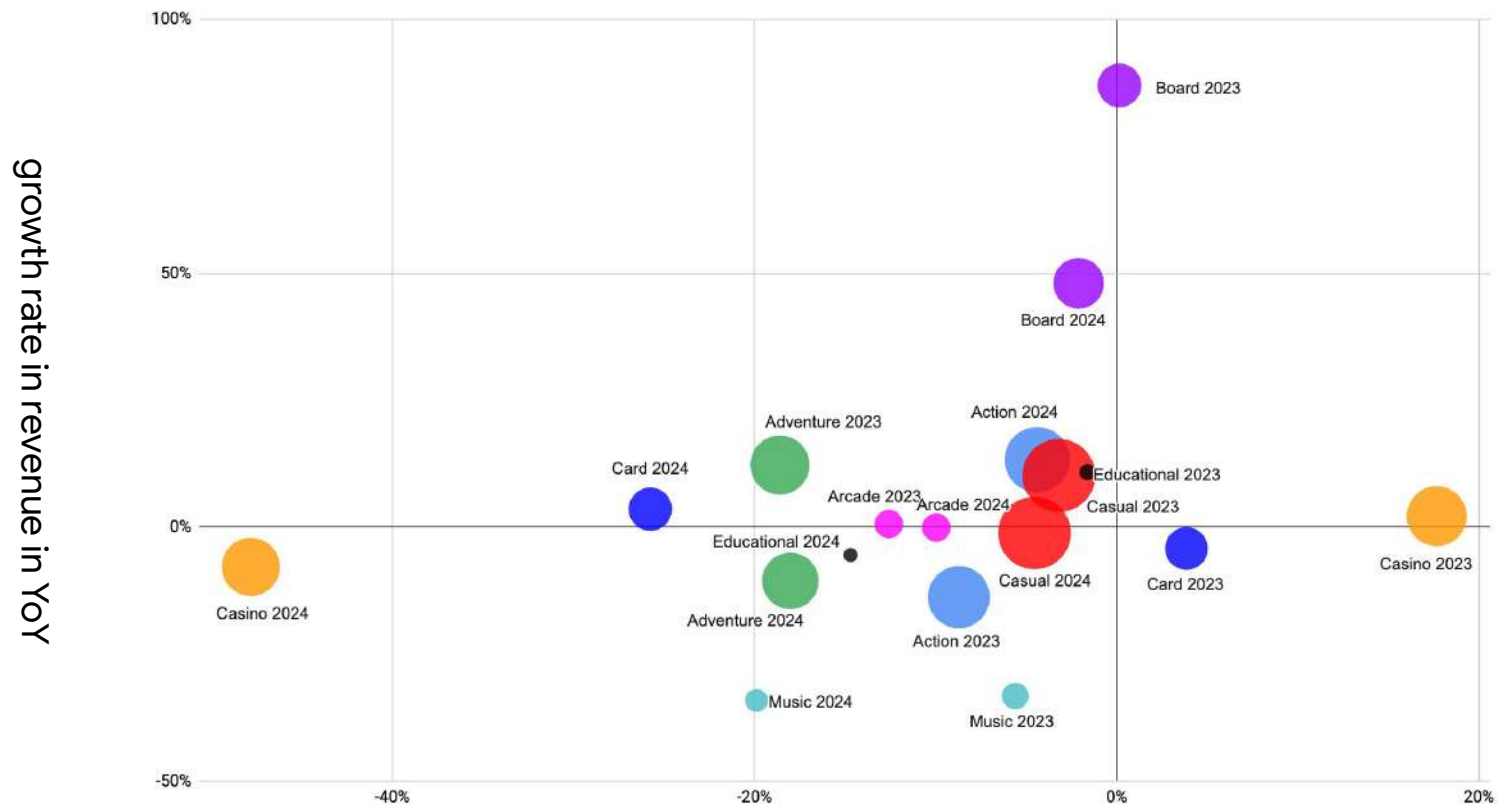
How to read genre and country reports?

- Each bubble with the date 2024 shows growth rate for specific genre in 2024 (2024 vs 2023)
- Each bubble with the date 2023 shows growth rate for specific genre in 2023 (2023 vs 2023)
- Size of the bubble shows revenue of specific genre (size of bubble for 2024 bubbles shows revenue in 2024 and size of the bubble for 2023 bubbles shows revenue in 2023)
- Data for iOS does not include China (as China cannot be targeted by majority of publishers)



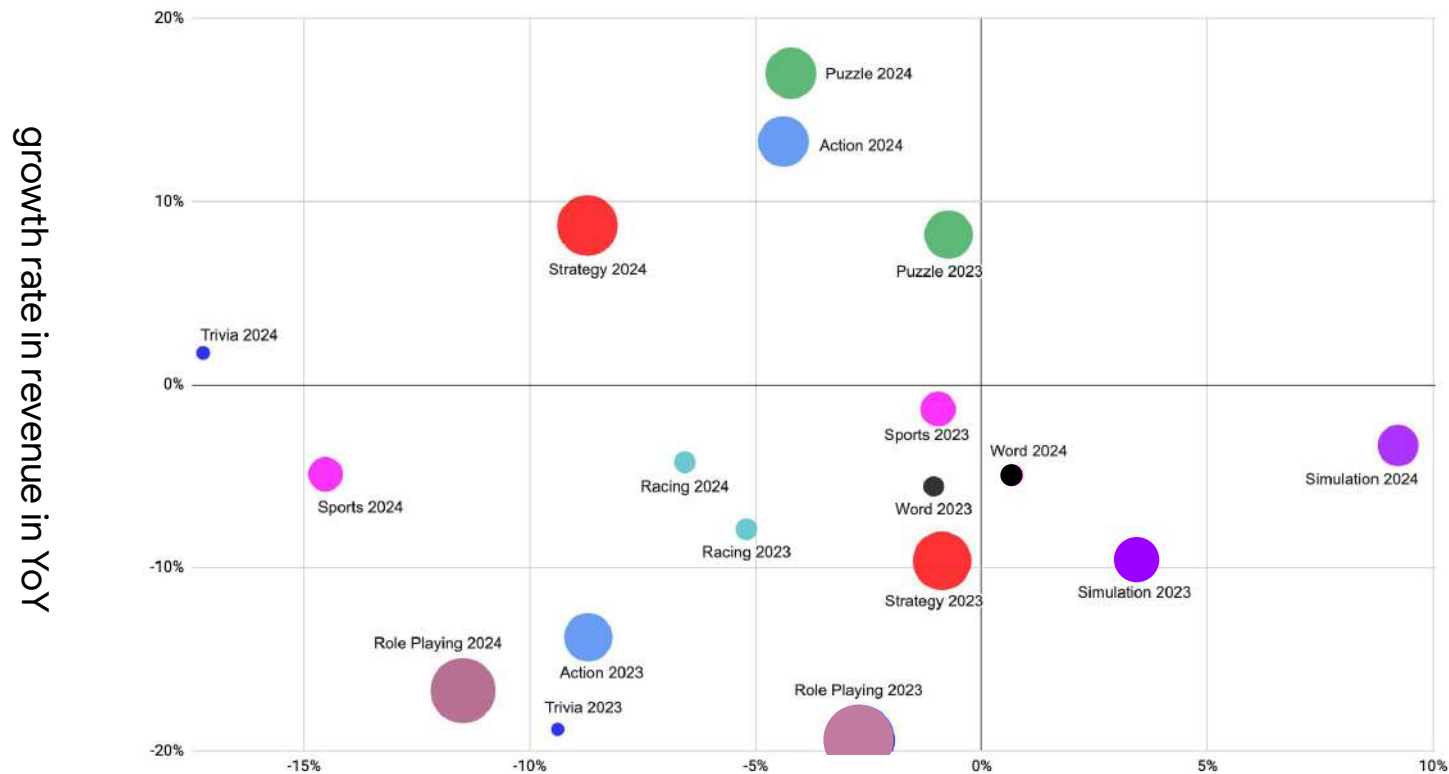
Top countries in mobile gaming - Google Play/Android

(2023 vs 2024 and 2022 vs 2023, size of bubble = revenue)



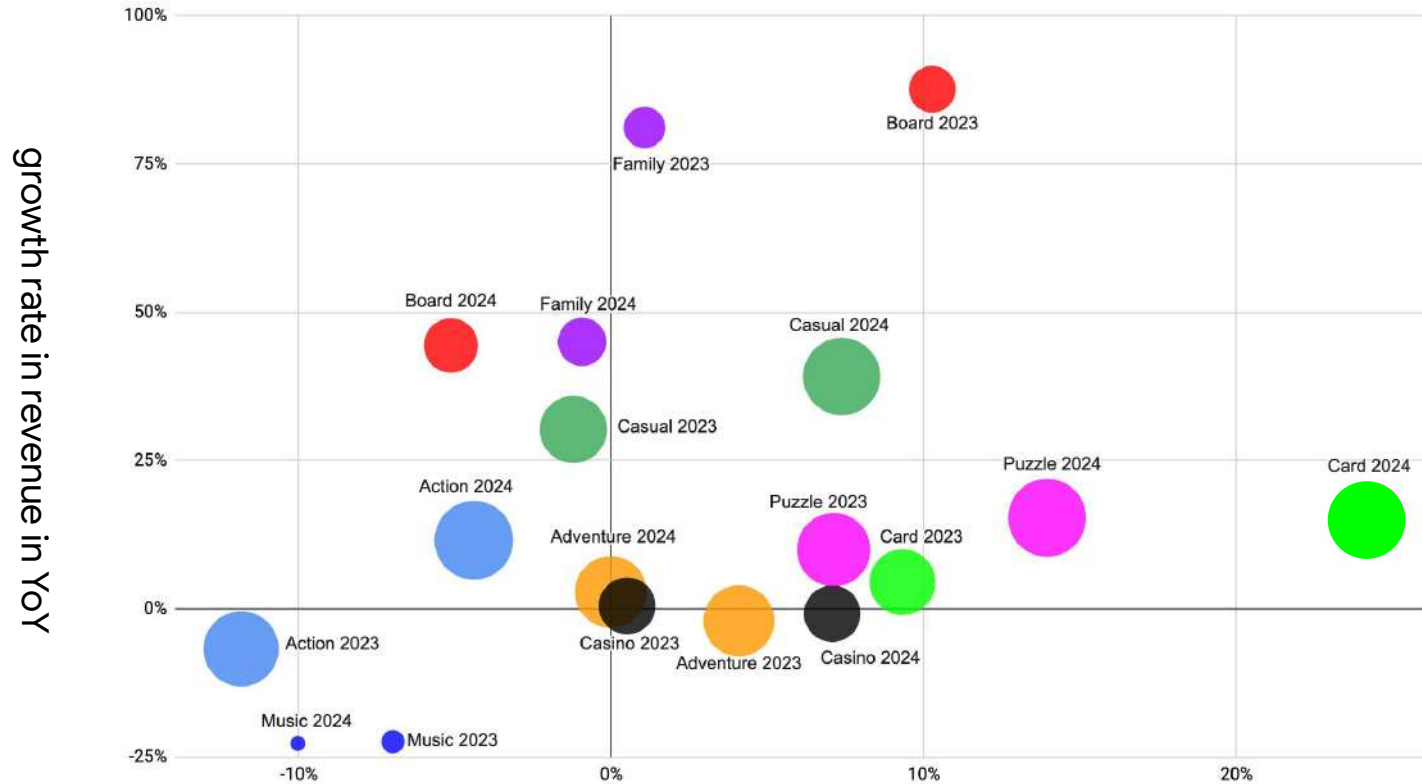
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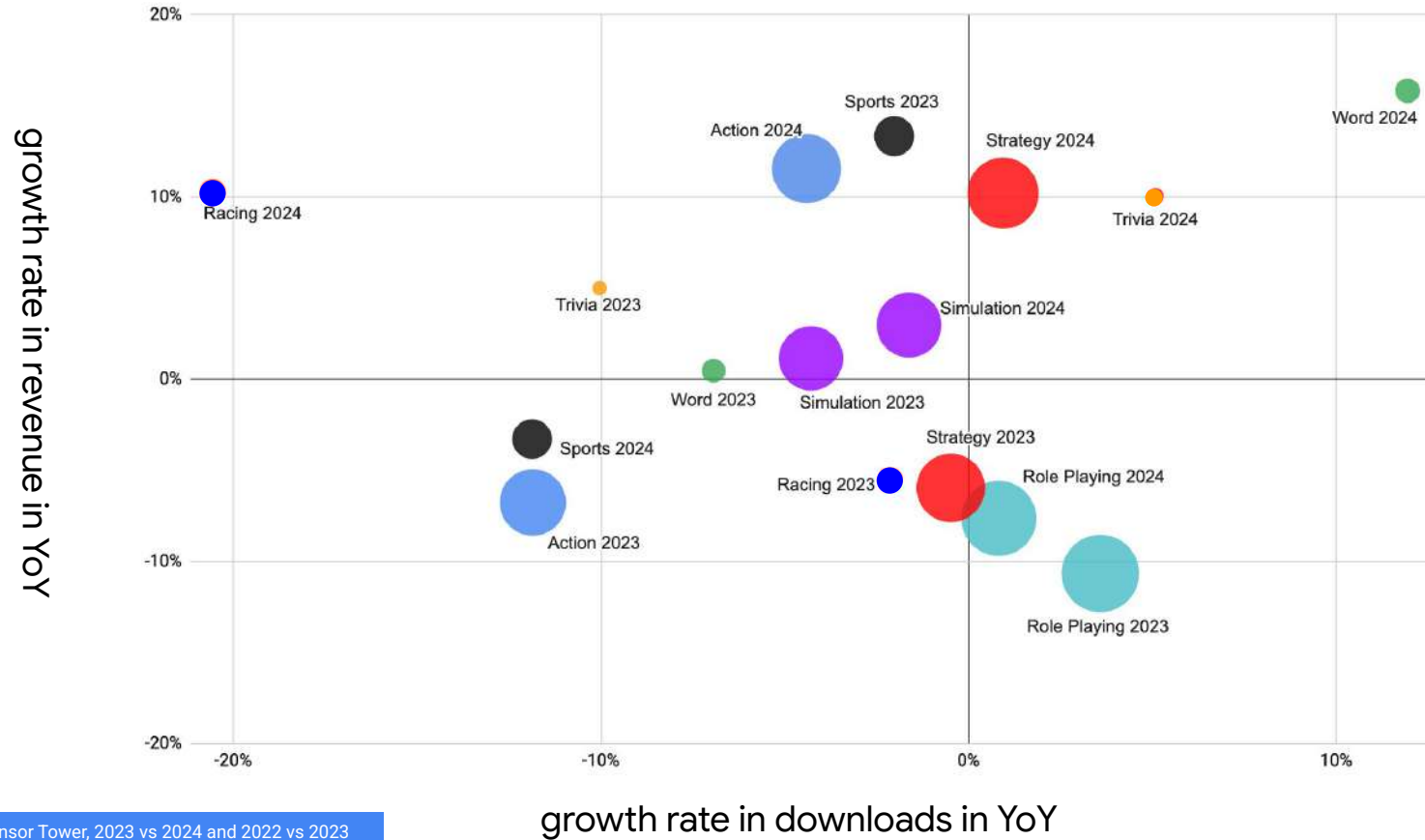
Top countries in mobile gaming - iOS, excluding China

(2023 vs 2024 and 2022 vs 2023, size of bubble = revenue)



Top countries in mobile gaming - iOS, excluding China

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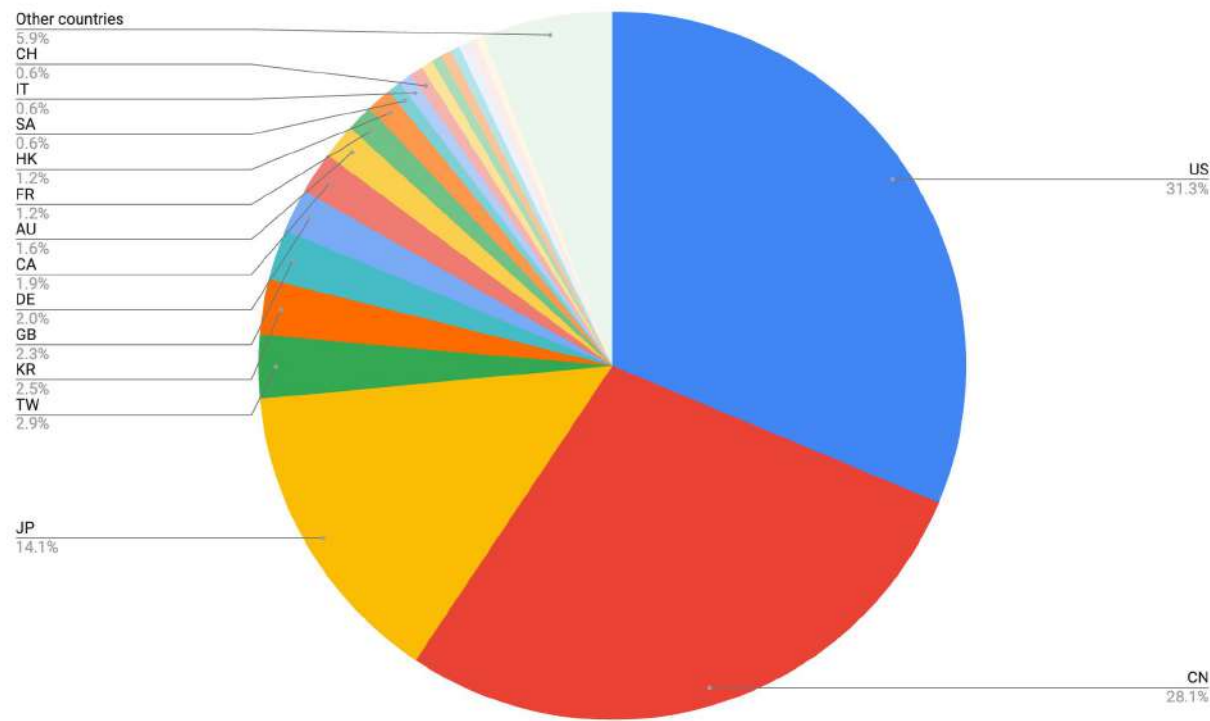




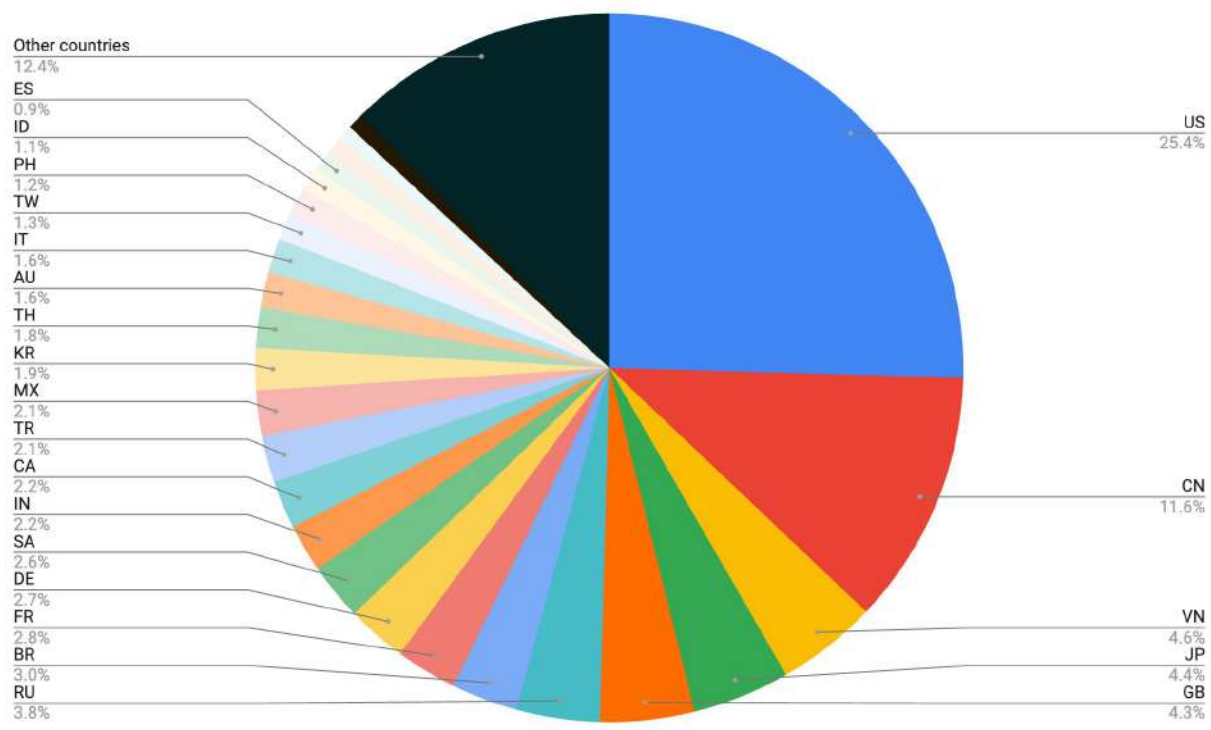
Top countries in mobile gaming

(what changed in iOS?)

Share of revenue in mobile gaming in 2024, iOS worldwide revenue

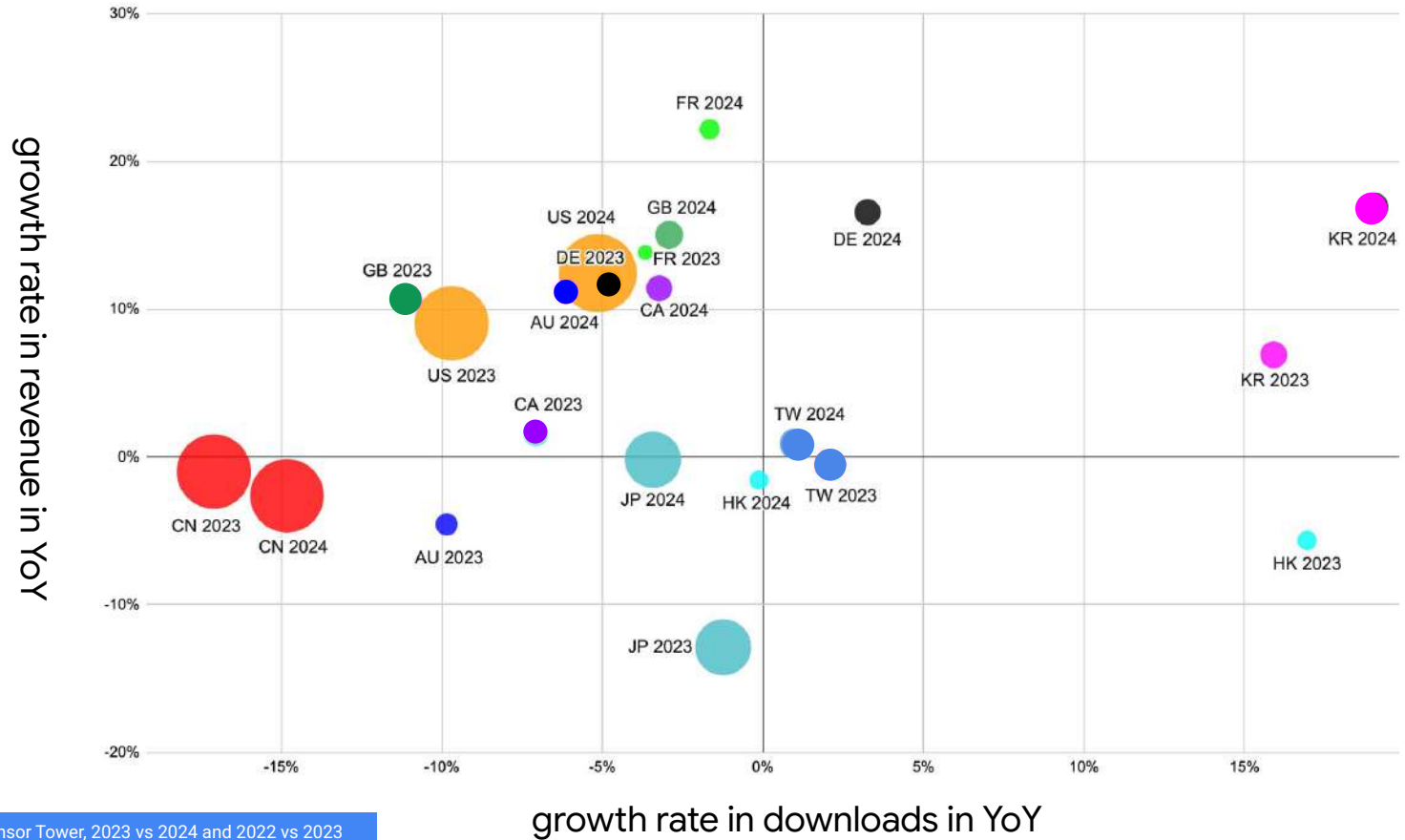


Share of downloads in mobile gaming in 2024, iOS worldwide downloads



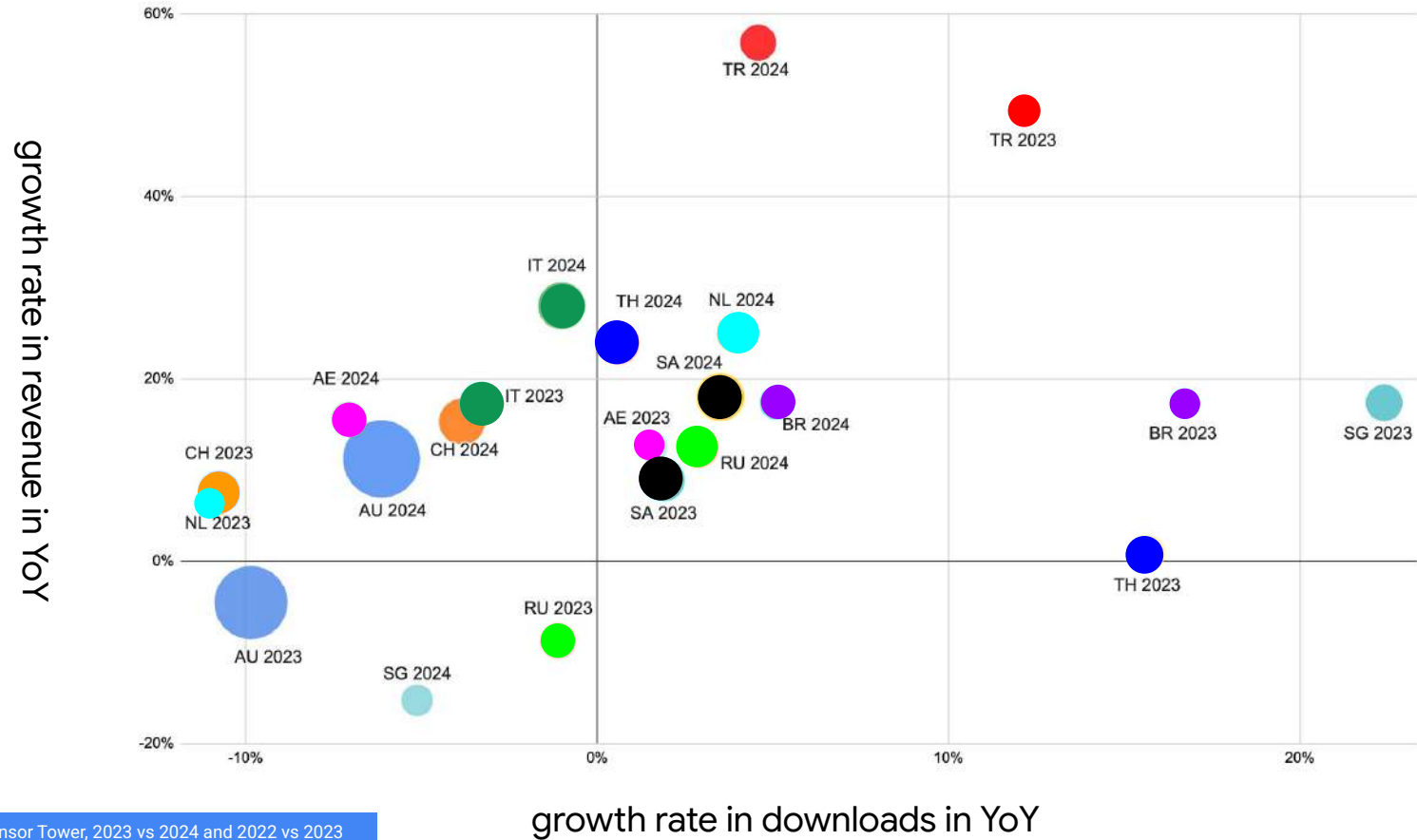
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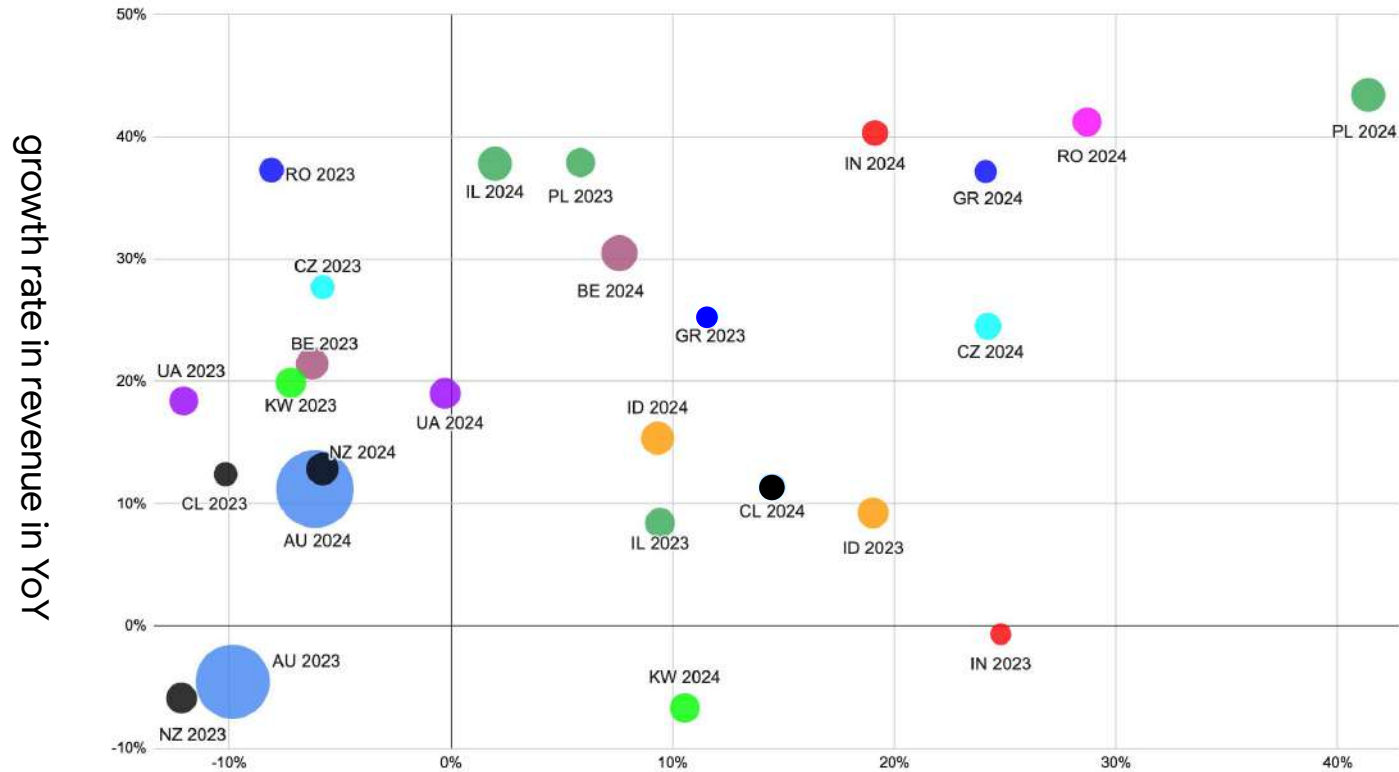
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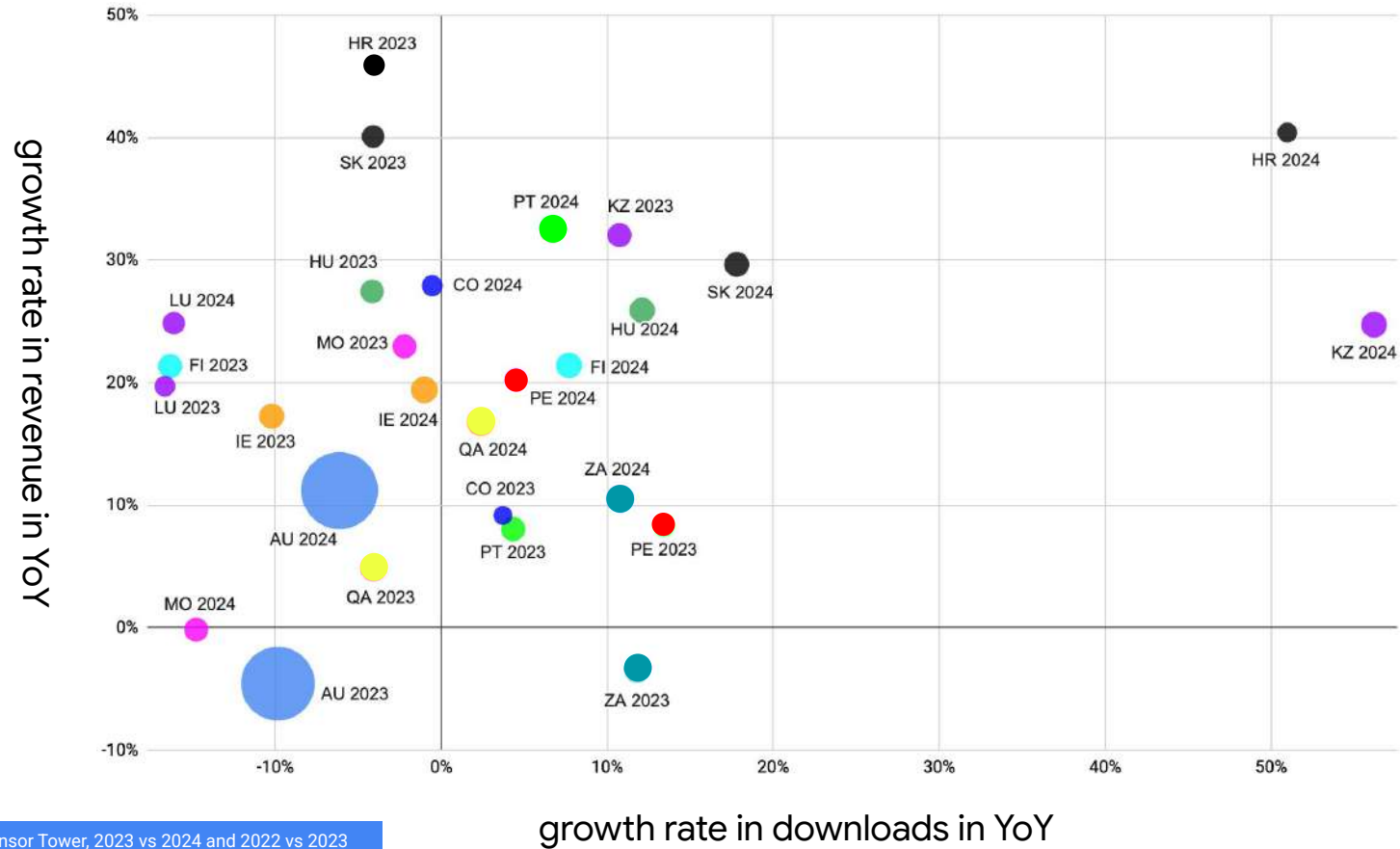
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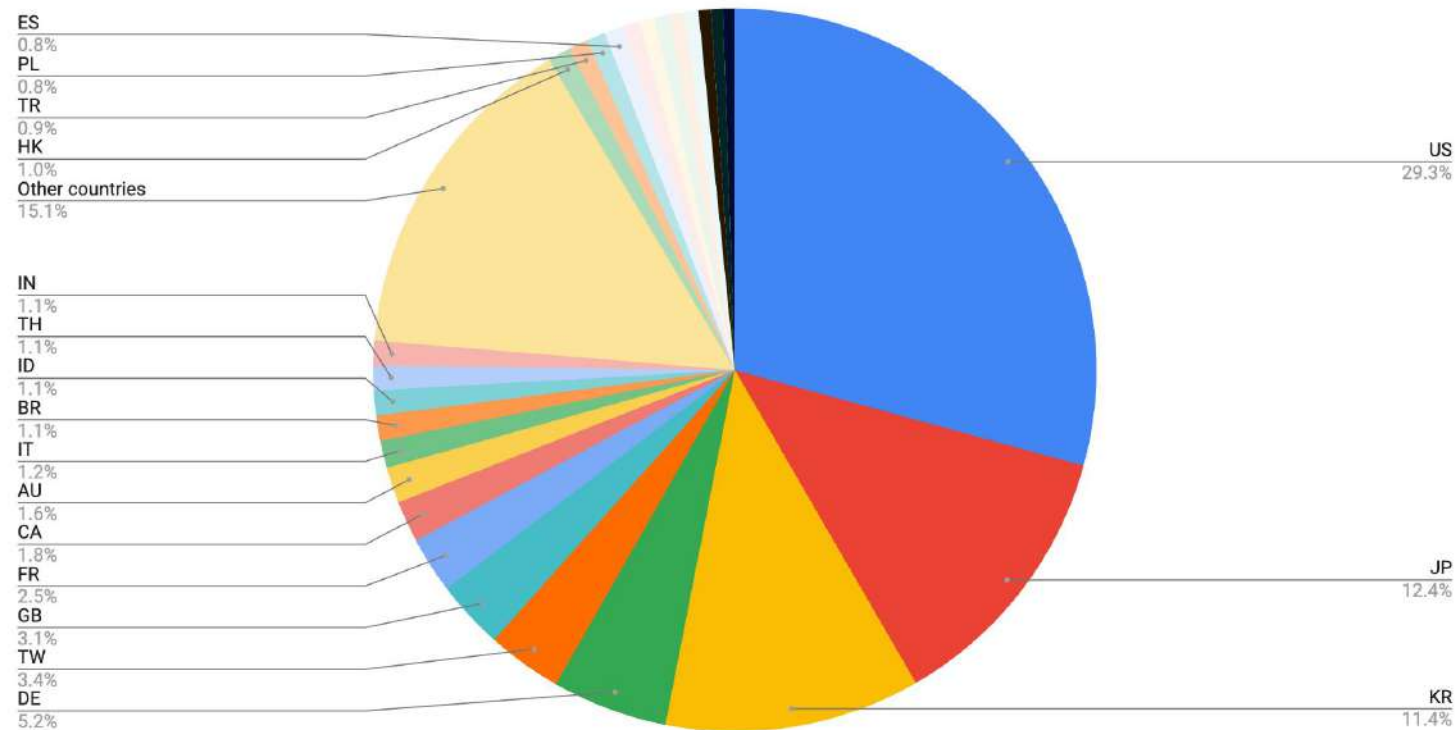


Top countries in mobile gaming

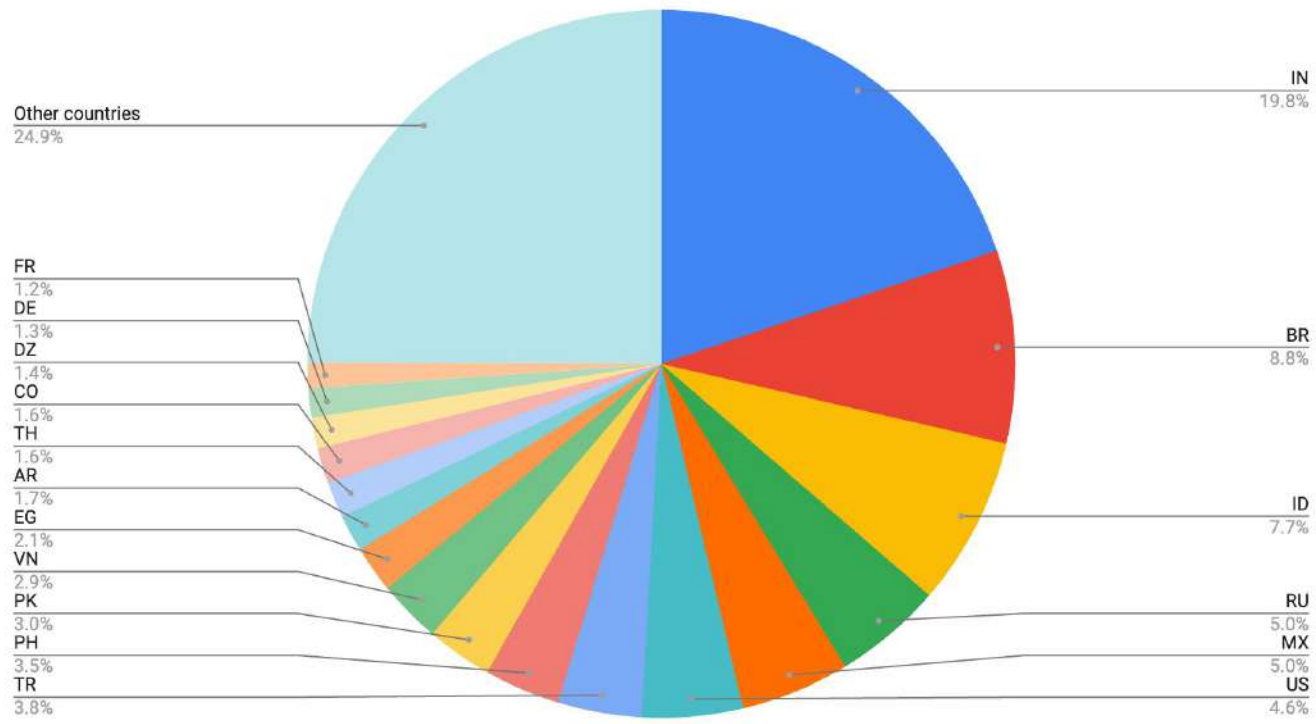
(what changed in Google Play?)



Share of revenue in mobile gaming in 2024

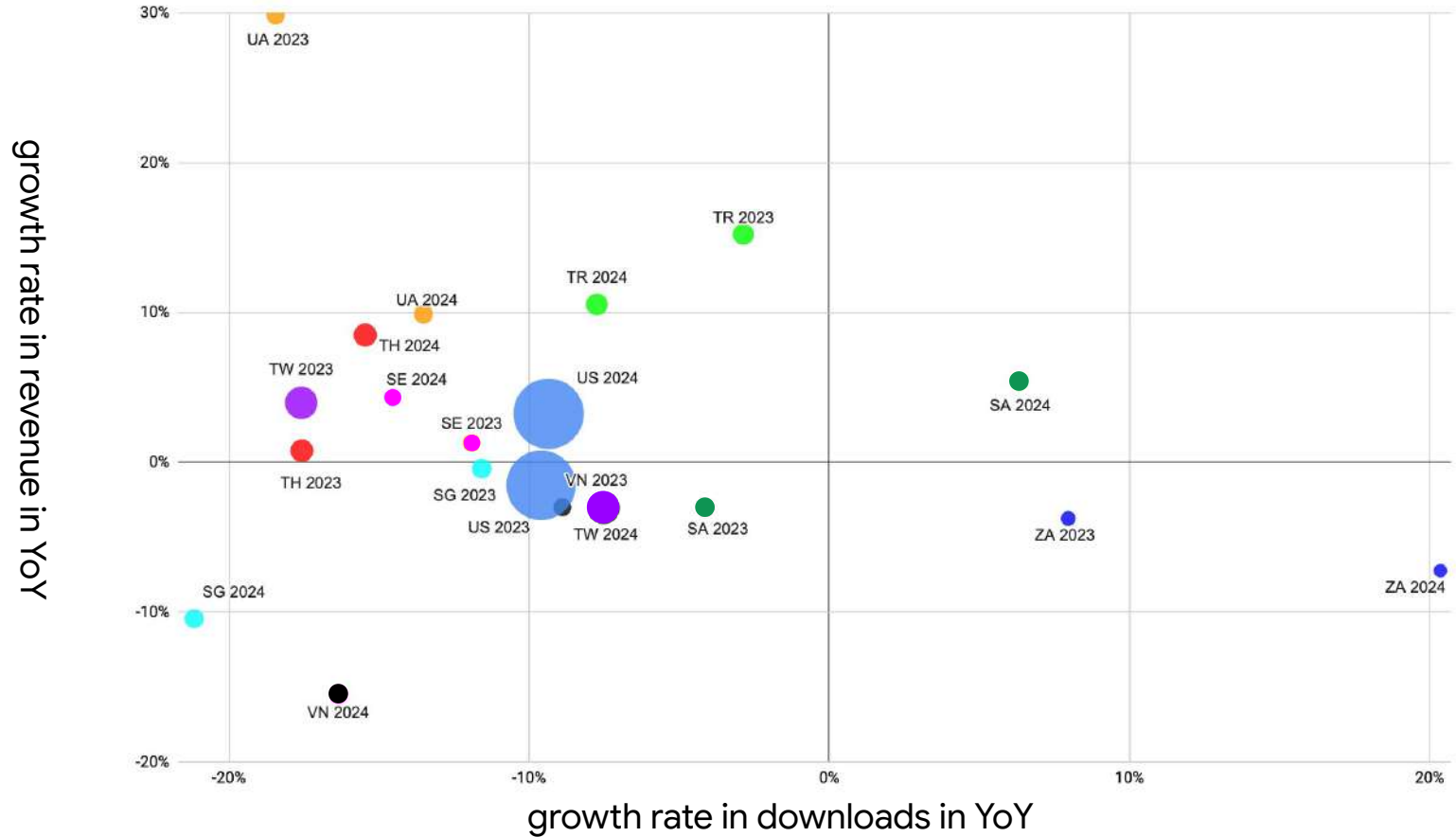


Share of downloads in mobile gaming in 2024



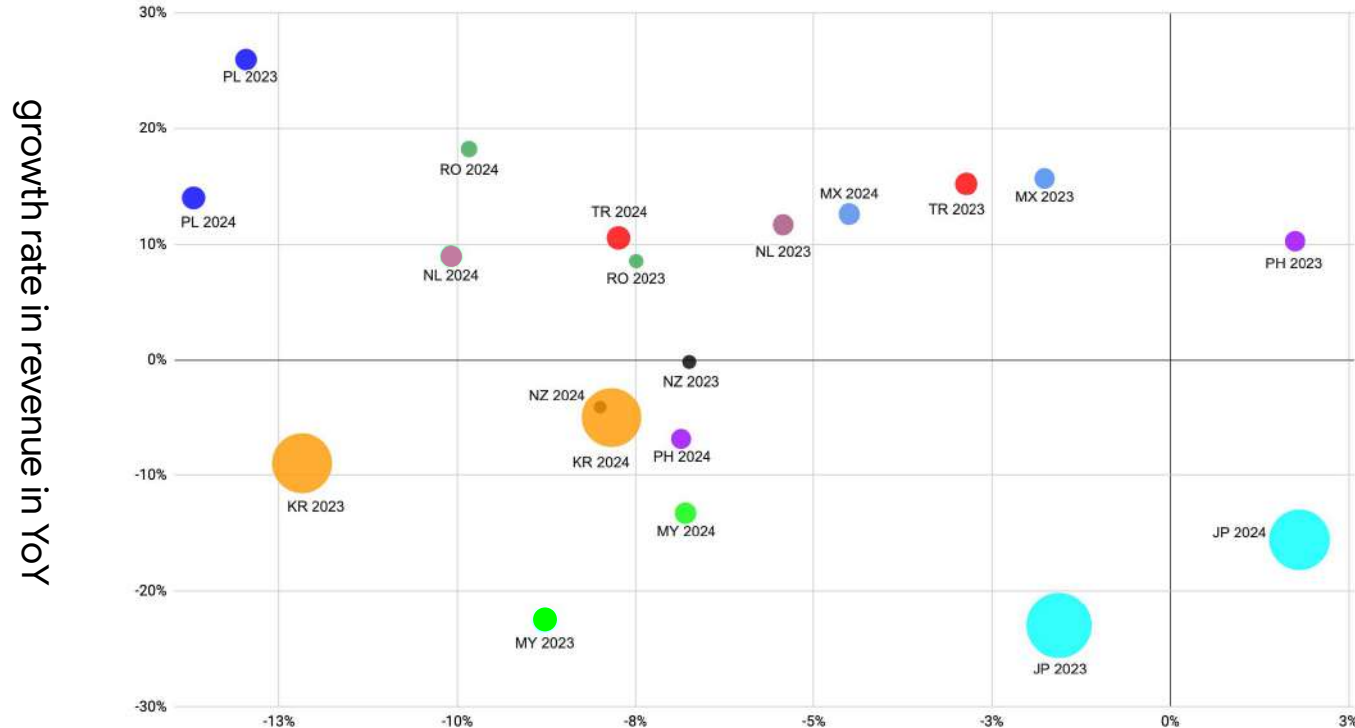
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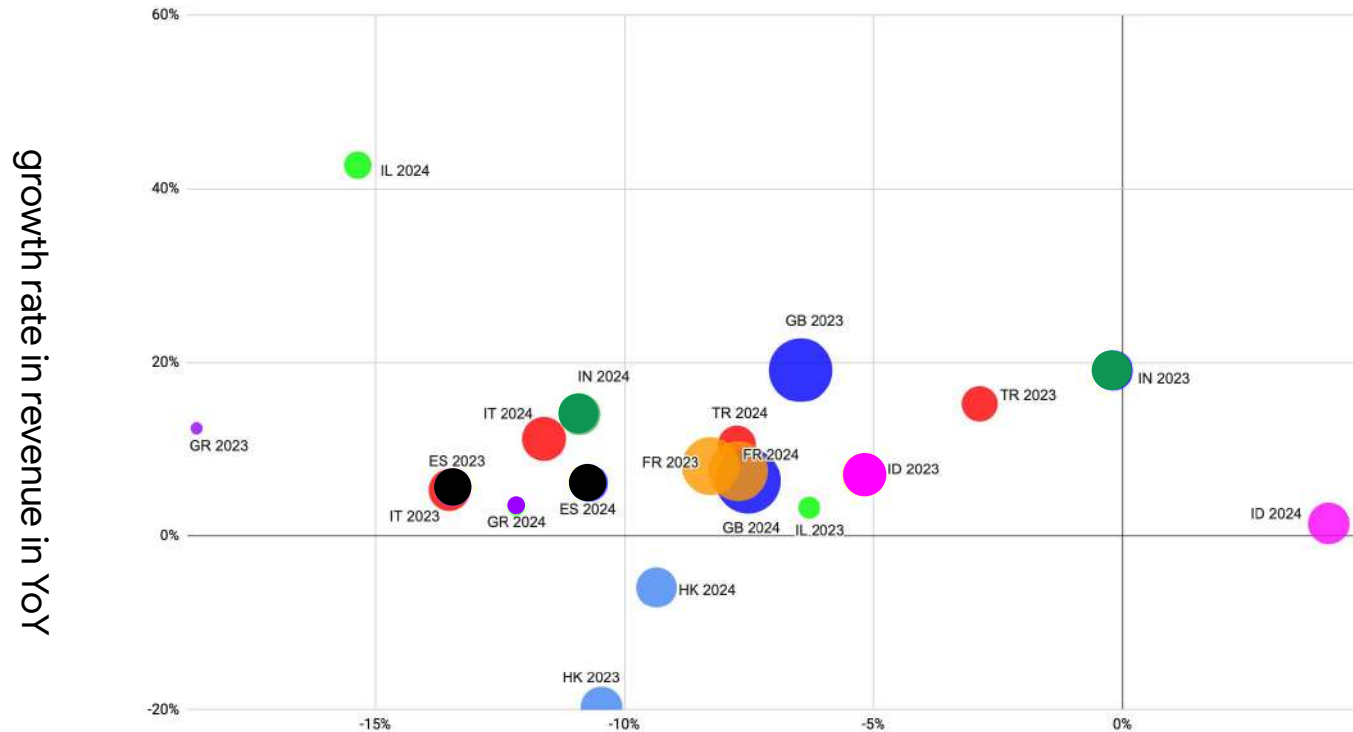


Source: Sensor Tower, 2023 vs 2024 and 2022 vs 2023

growth rate in downloads in YoY

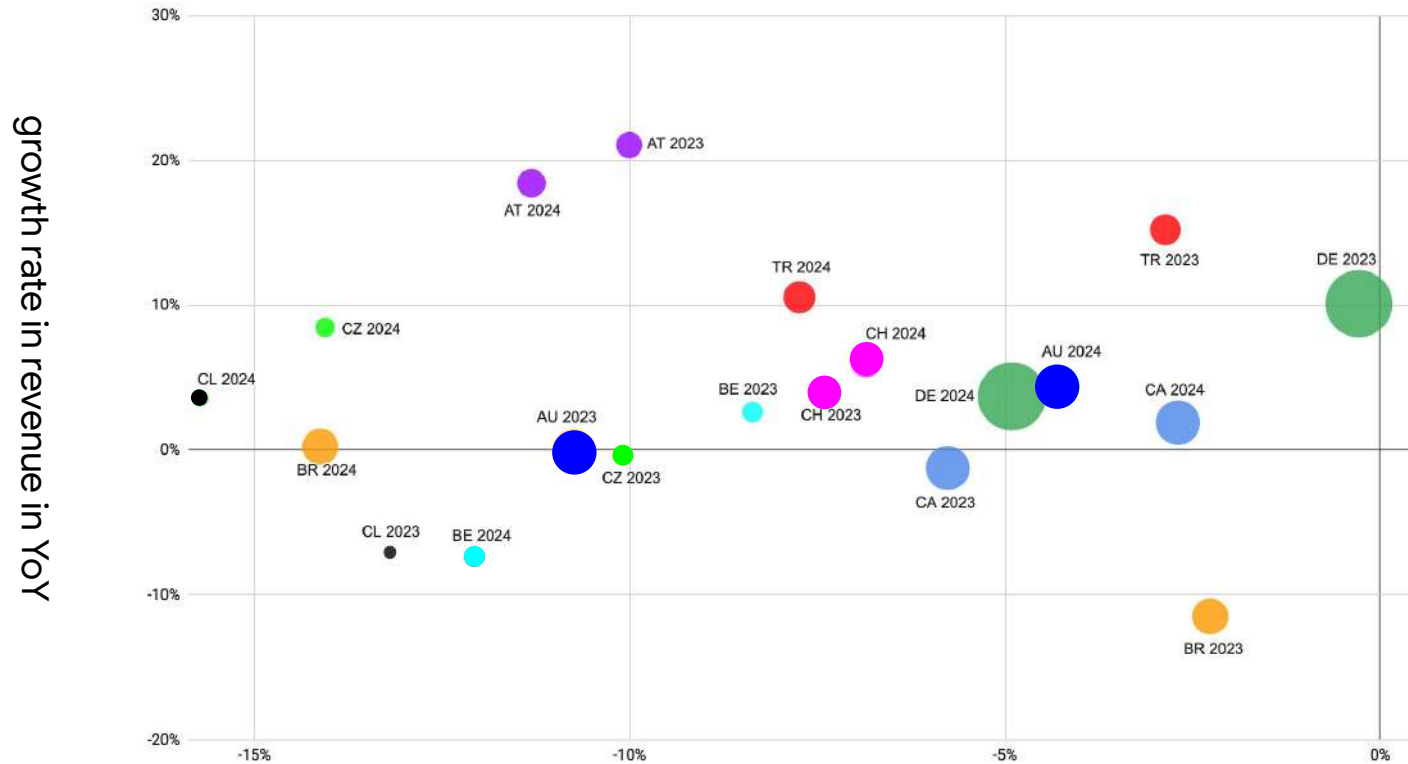
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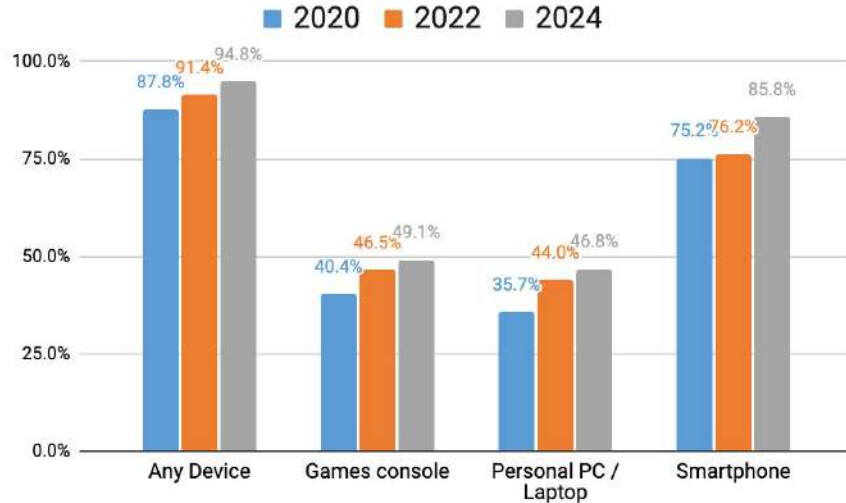


Insights about mobile gaming users

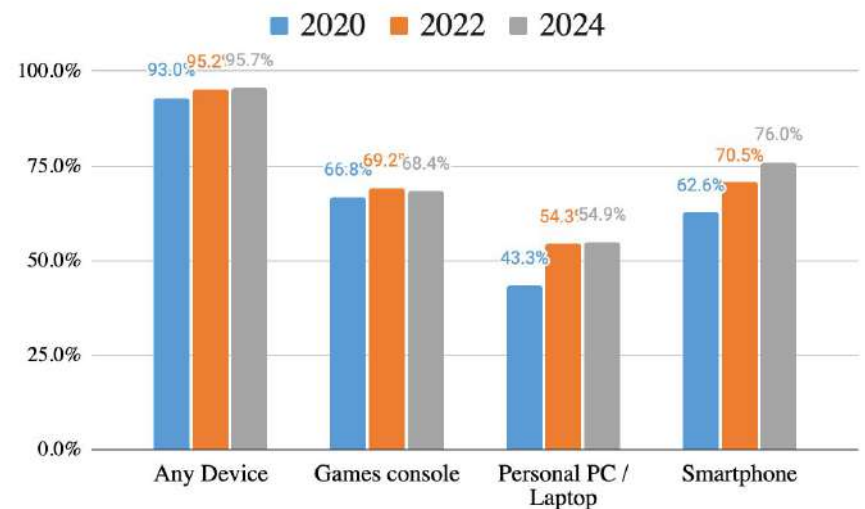
There is no danger that gaming will go away...Even very young users still play games

Which of these devices do you use to play games? **US**

Female, 16-24



Male, 16-24

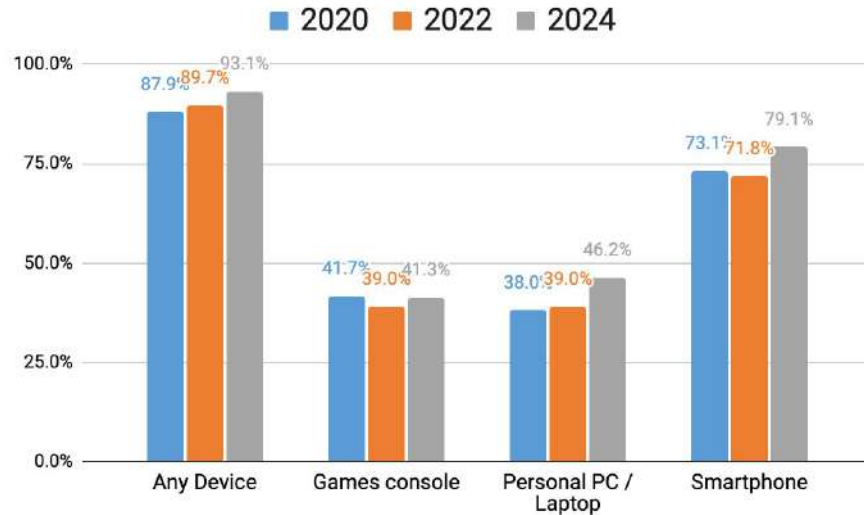


Source:GWI

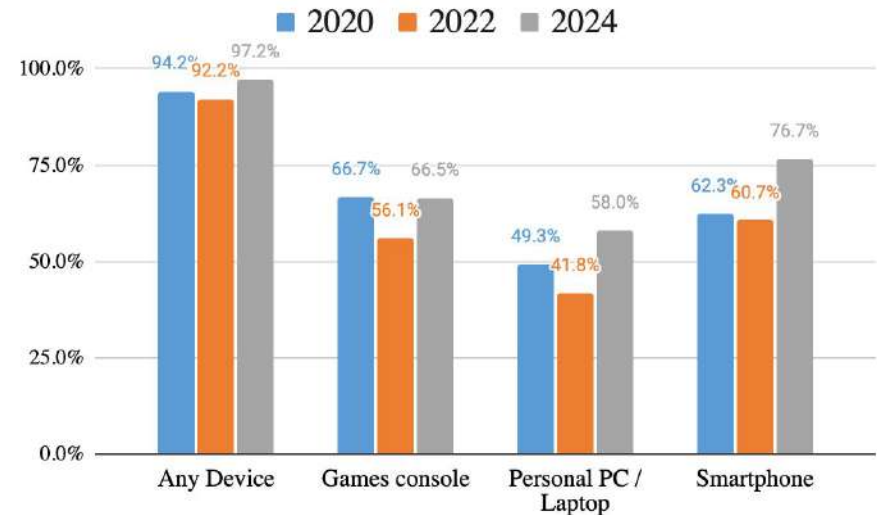
There is no danger that gaming will go away...Even very young users still play games

Which of these devices do you use to play games? **UK**

Female, 16-24



Male, 16-24

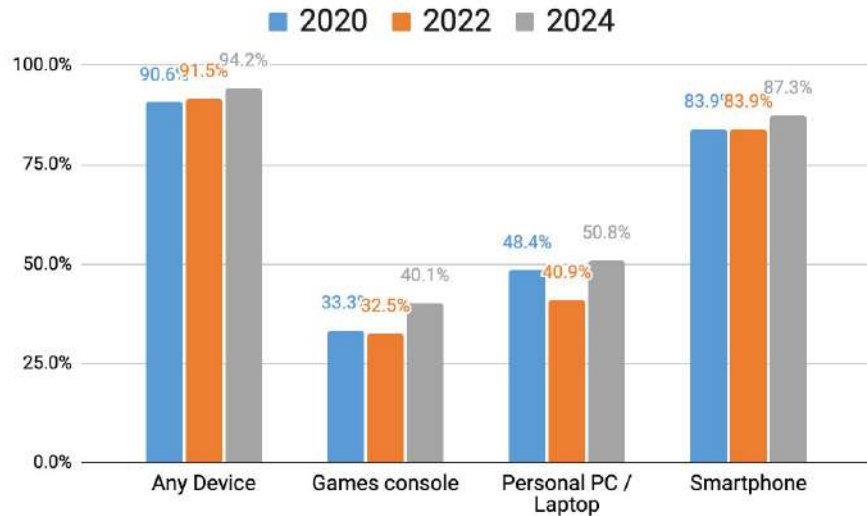


Source:GWI

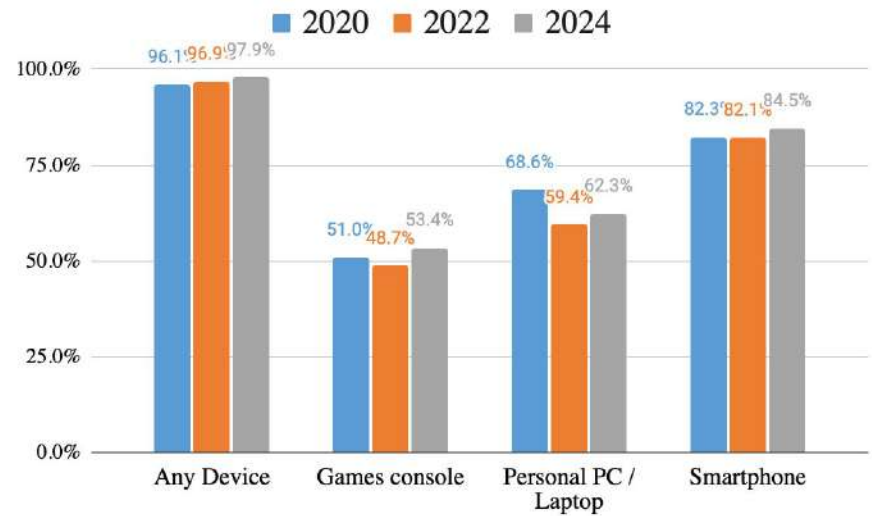
There is no danger that gaming will go away...Even very young users still play games

Which of these devices do you use to play games? **Brazil**

Female, 16-24

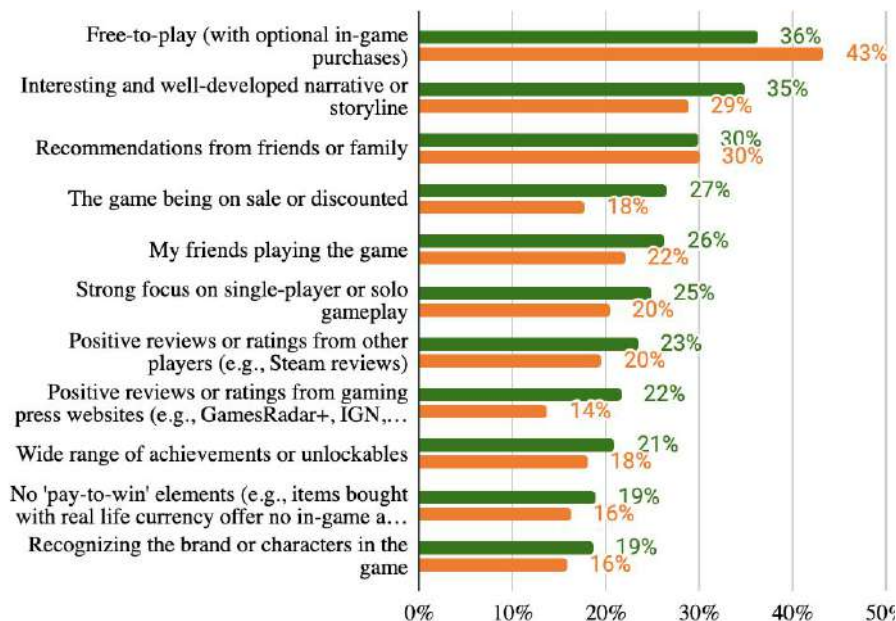


Male, 16-24

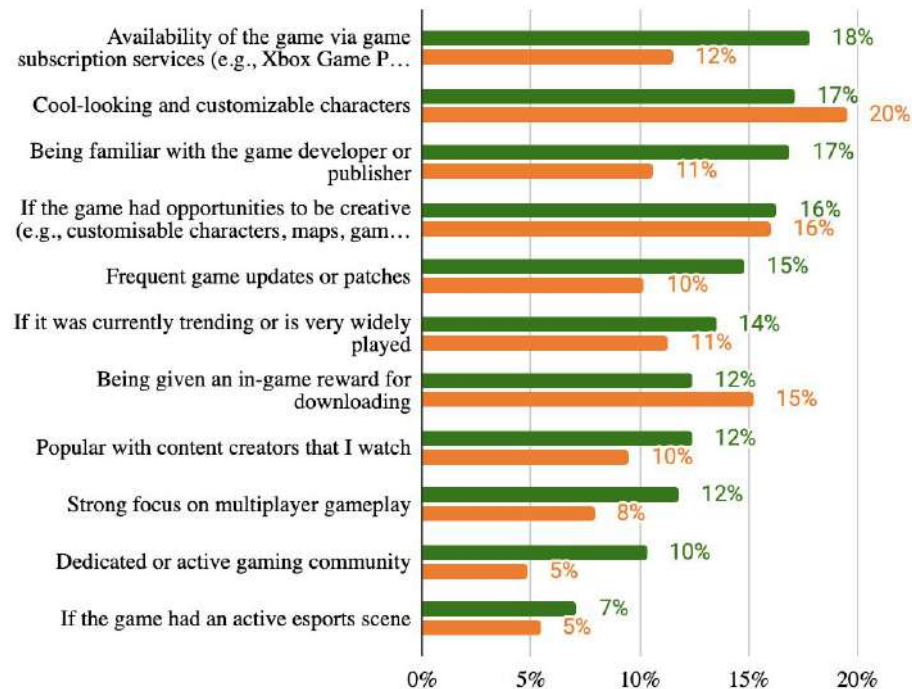


Which of the following, if any, would motivate you to download or play a new game? By "new game", we mean games that you've never played before. These could be games that already exist or are newly released.

■ Male ■ Female



■ Male ■ Female

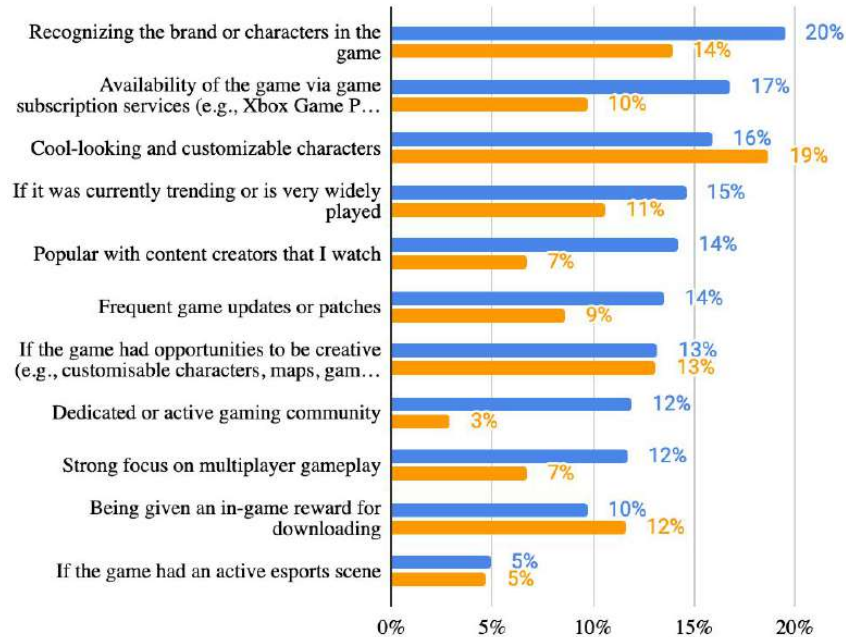
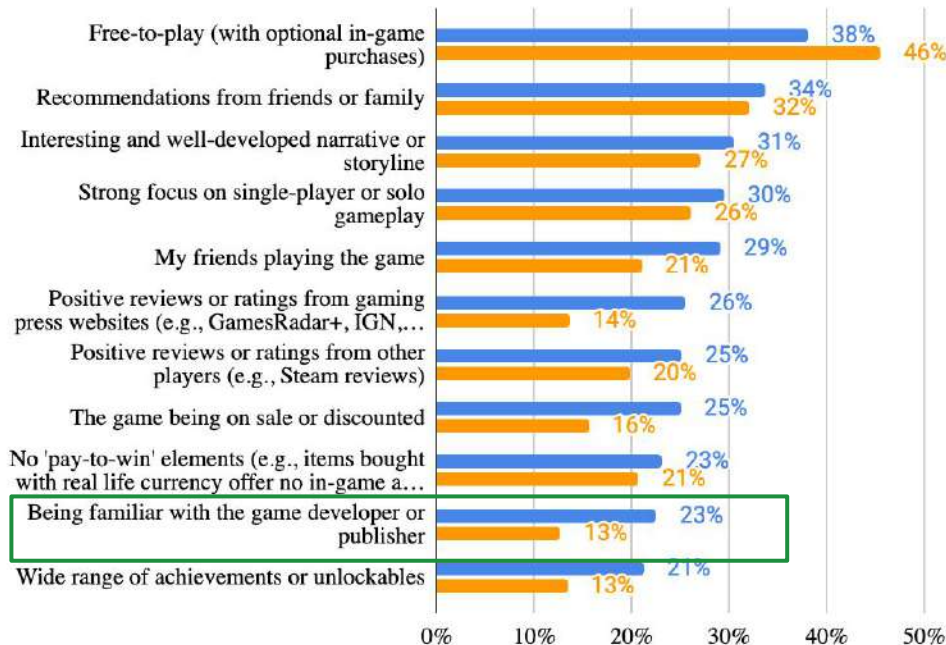


Source:GWI, Q3 2024

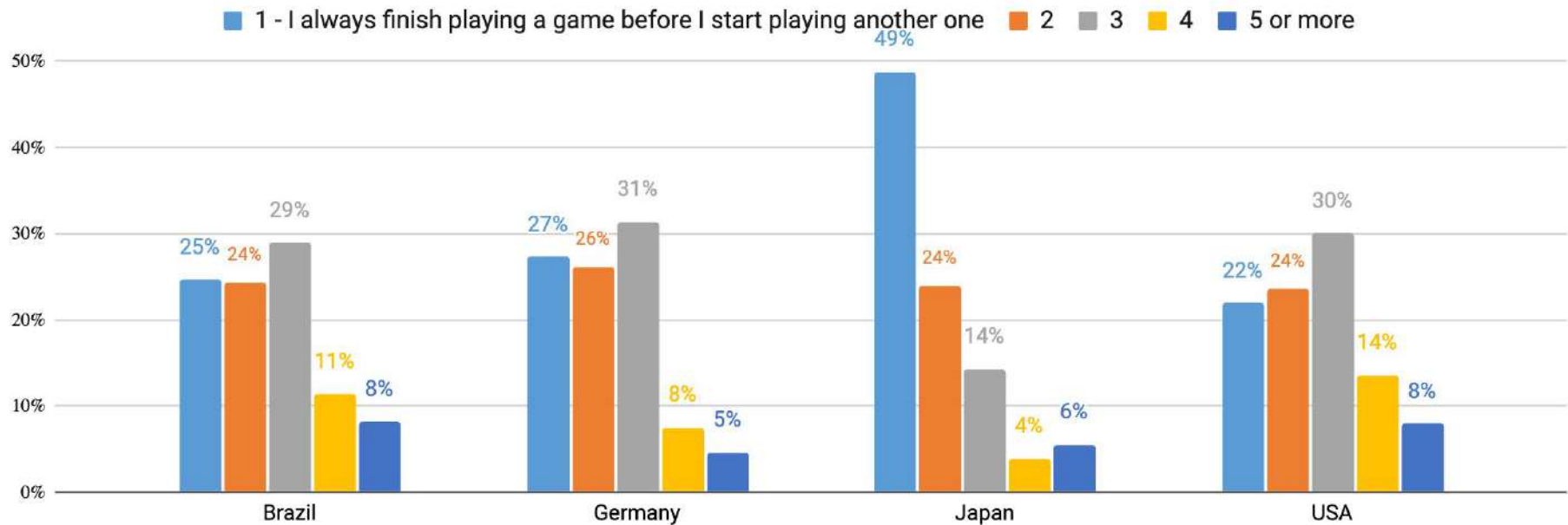


Which of the following, if any, would motivate you to download or play a new game? By "new game", we mean games that you've never played before. These could be games that already exist or are newly released. (US only)

■ Male ■ Female



Most of users play few games



Summary

Proprietary + Confidential

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