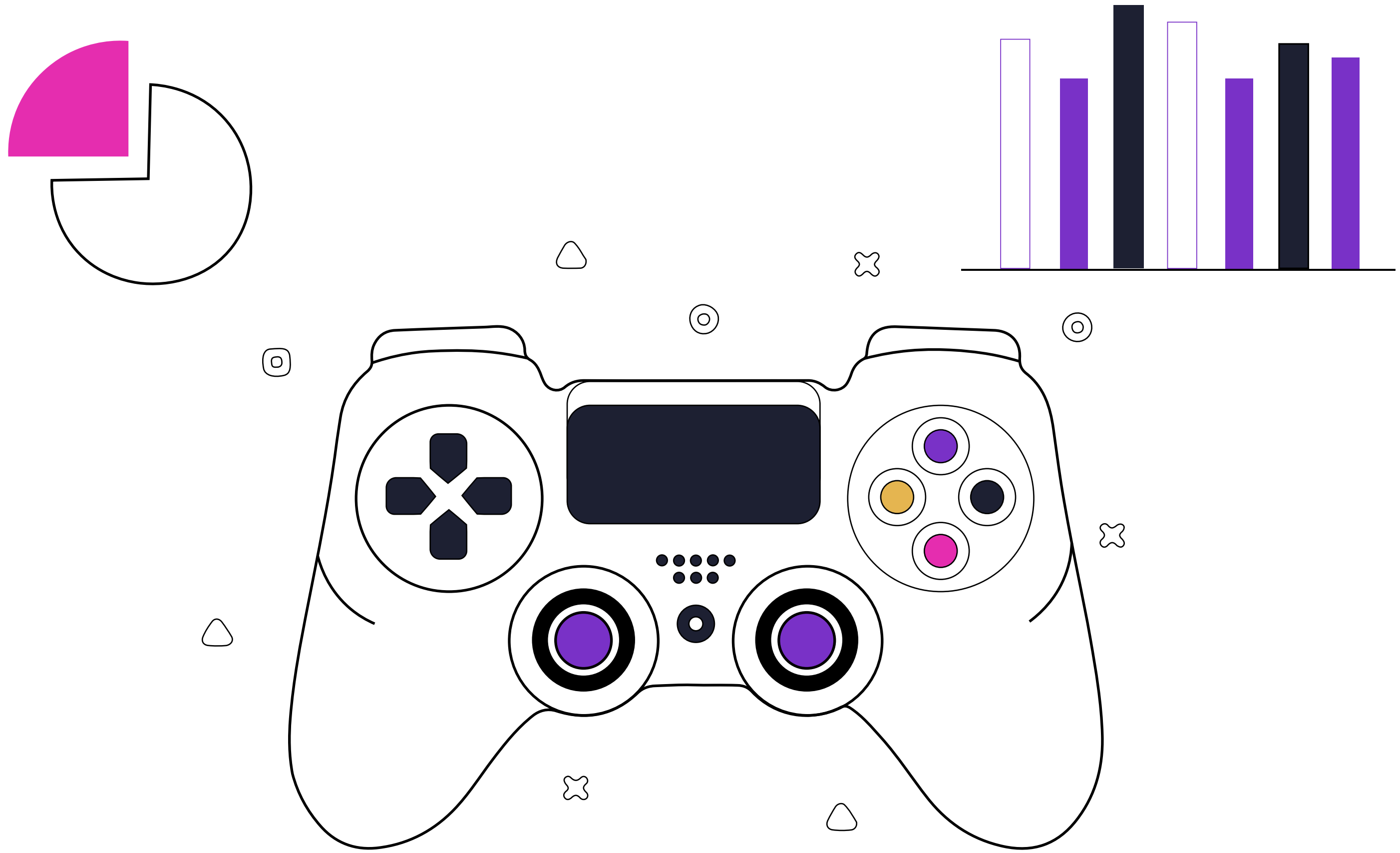
Mobile games: state of the market

H1, 2023



Apptica

Methodology

The purpose of this study is to analyse the application in gaming category in H1 2023.

All data presented in this report has been collected from Apptica platform.

“Games” category is defined by a store’s tag.

The basis of this analysis is made up of data from the Apptica's Store, Ad and Market Intelligence sections.

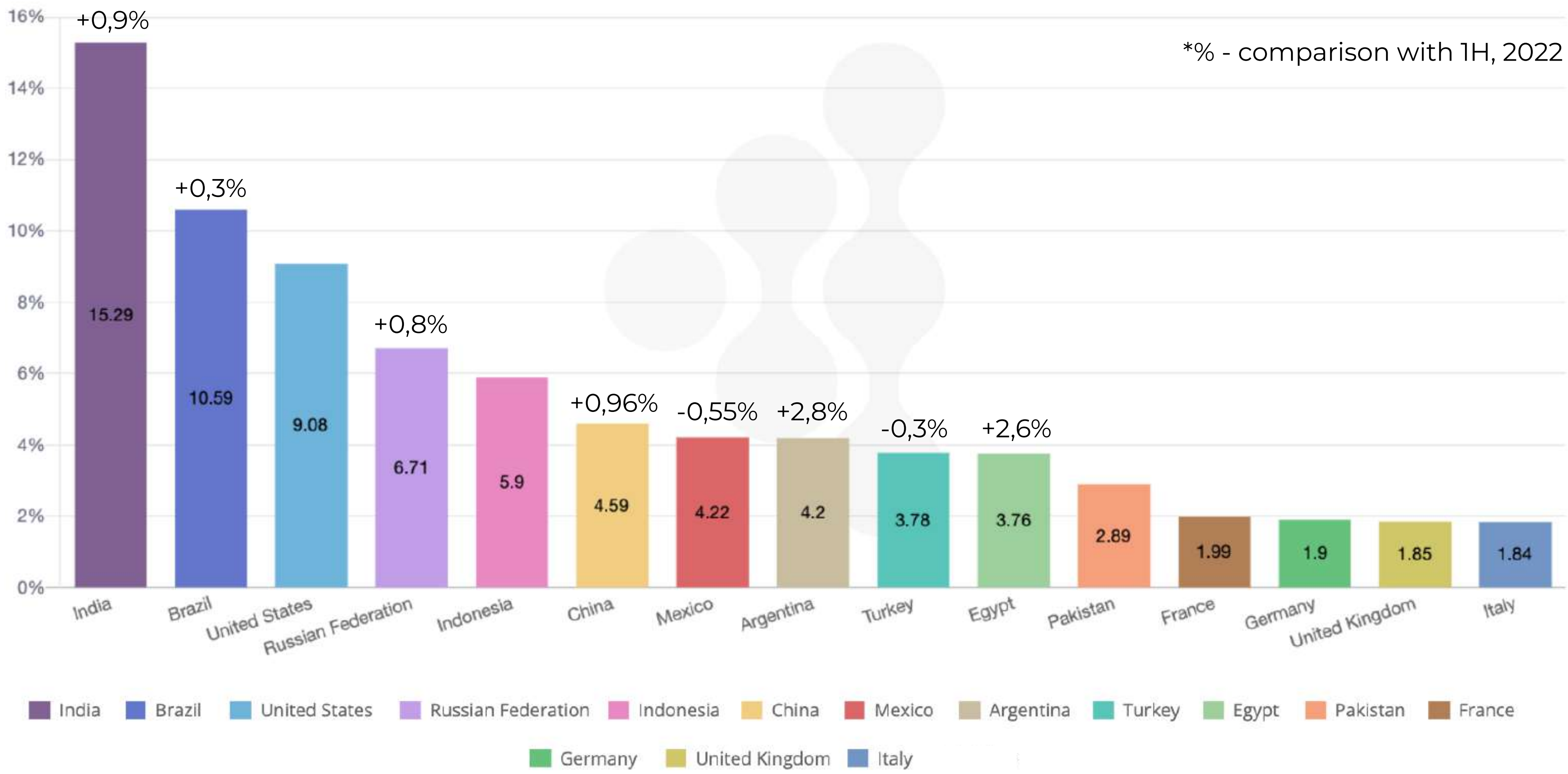
We collect data only from App Store and Google Play, we do not cover other alternative stores.

To obtain accurate results, we have analysed data on 37 countries collected from January 01 to June 30, 2023.

We have not used additional information from other analytical services or resources without mentioning them.

Revenue figures are based on IAP figures, we do not cover other revenue sources.

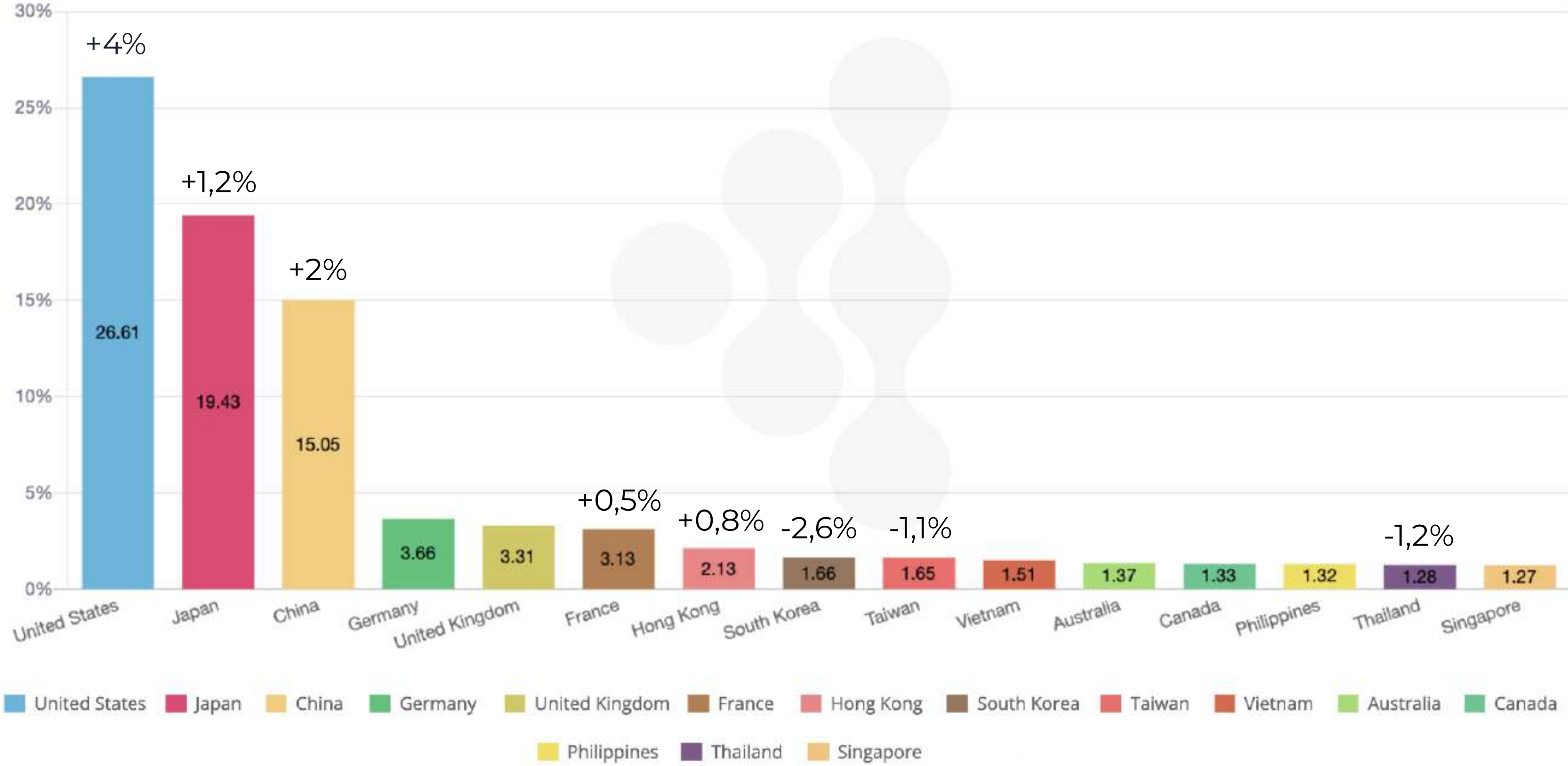
Downloads | Top-15 Countries



India (4,32B) remains the largest market for downloads, accumulating 15,29%. Brazil (2,99B) takes the second place surpassing the US (2.57B). Thailand (357,4M) left the ranking with a drastic drop (-8,6%).
China (1.3B) gains a larger share (+0,96%) leaving behind Mexico (-0,5% | 1.19B). Egypt (+2,6% | 1.06B) and Argentina (+2,8% | 1.19B) join the list replacing Saudi Arabia (-0,3% | 447.8M) and Thailand.

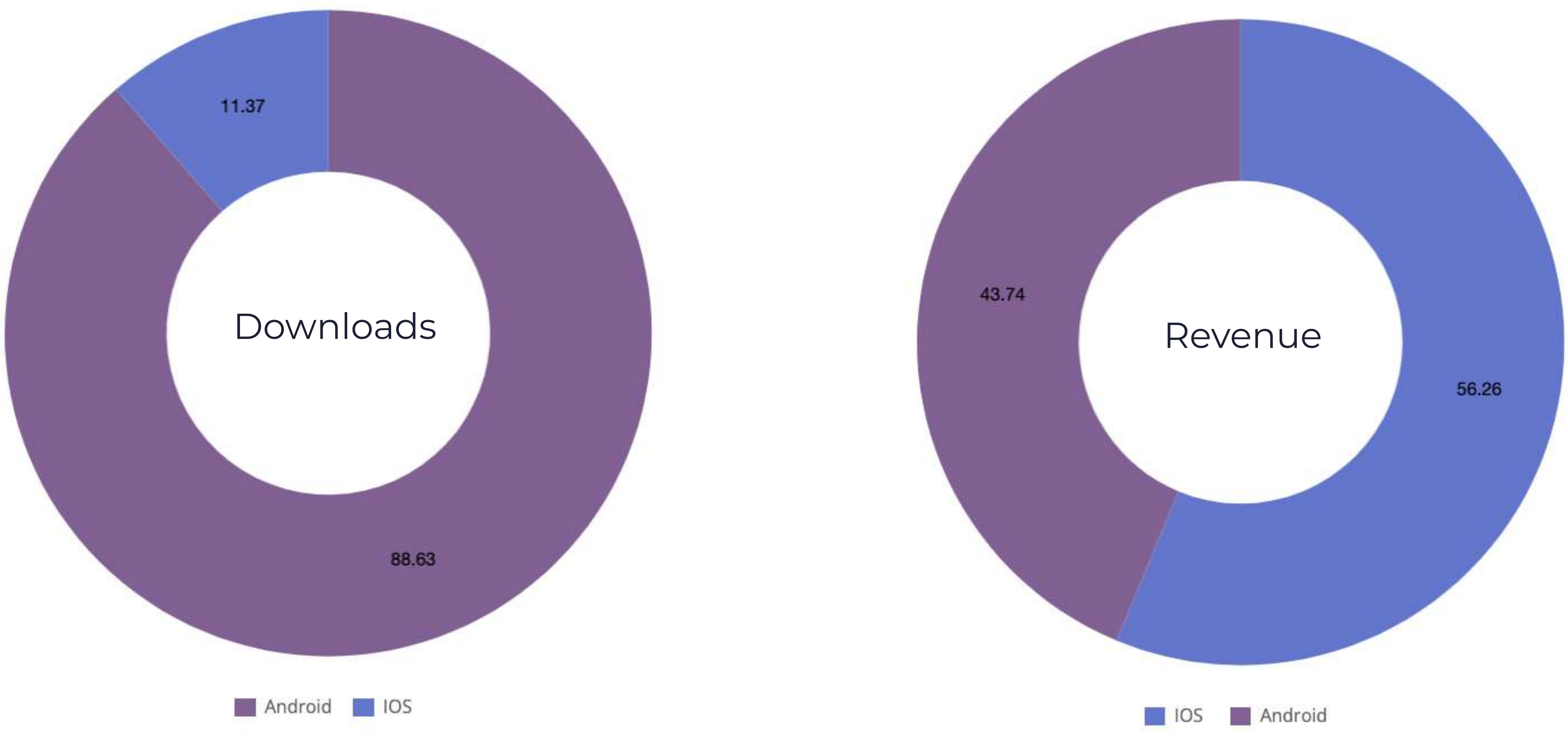
Revenue | Top-15 Countries

*% - comparison with 1H, 2022



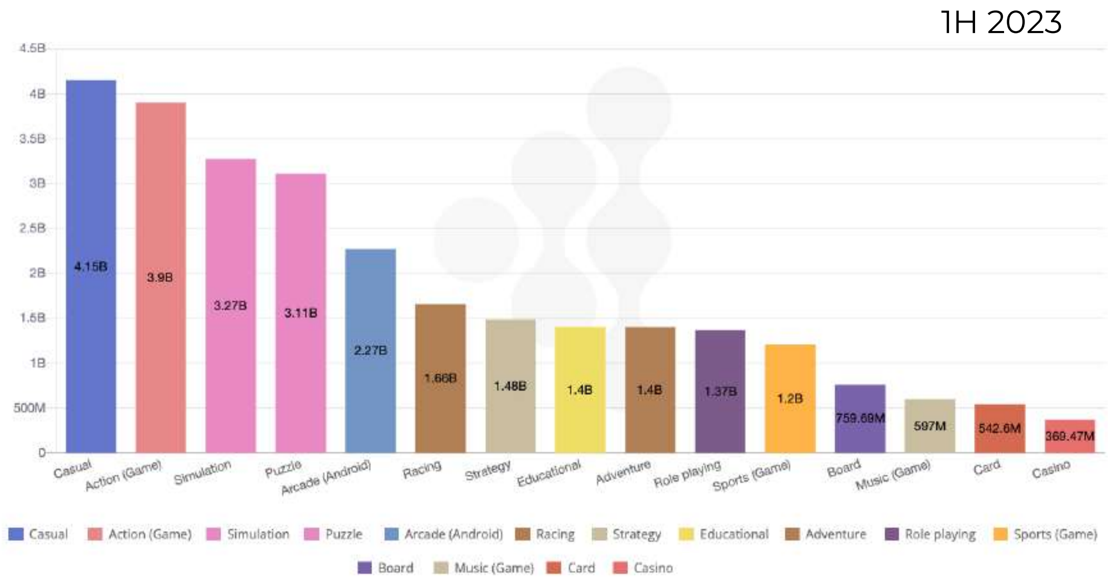
The United States ($5,71B) continues to gain market share (+4% compared to the first half of 2022) along with Japan (+1,2% | $4,17B), China (+2%| $3.23B). South Korea experiences the biggest decline (-2,6% | $356.3M). While the Russian Federation leaves the Top-15 countries (-0,49% | $183M), South Africa (-0,7% | $163.3M), Vietnam (+0,35% | $324.3M) and Australia (+0,17% | $294.2M) join the list.

Downloads & Revenue by Platform

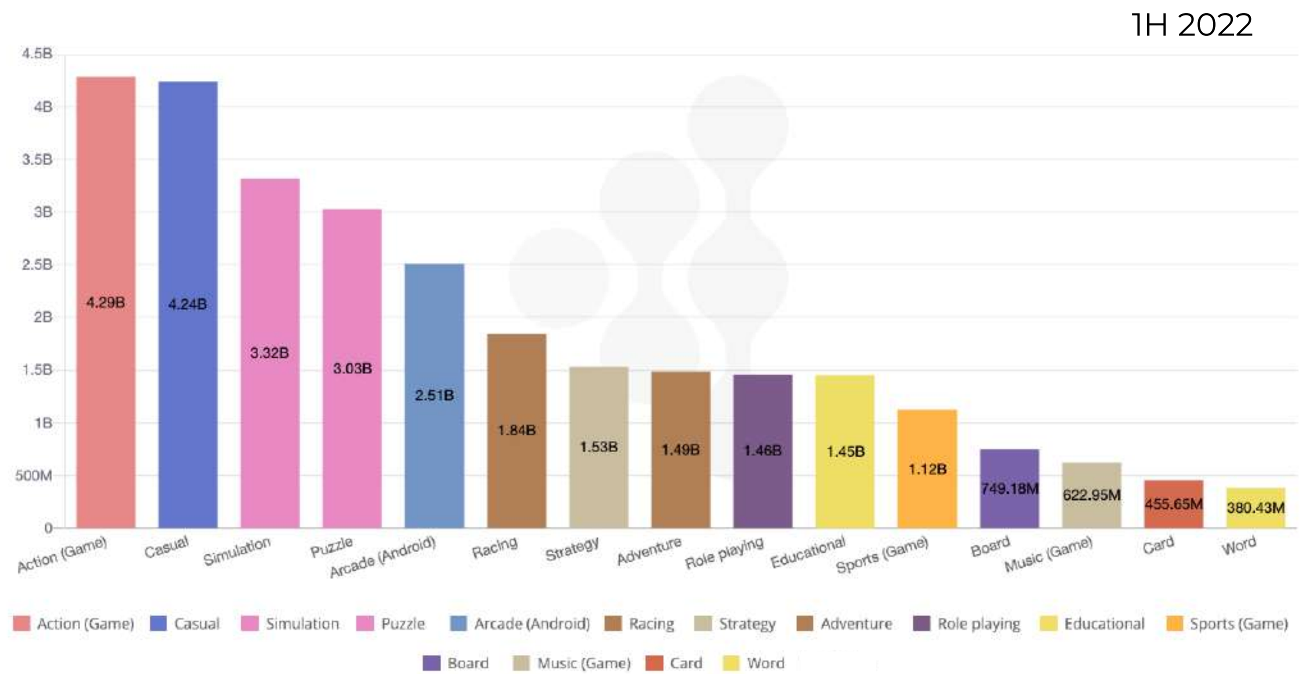


The platform divergency brings no surprise. The most downloads are secured by Google Play (88,6%), whereas the biggest share of revenue is generated by AppStore (56,3%).

Subcategories in gaming | Downloads



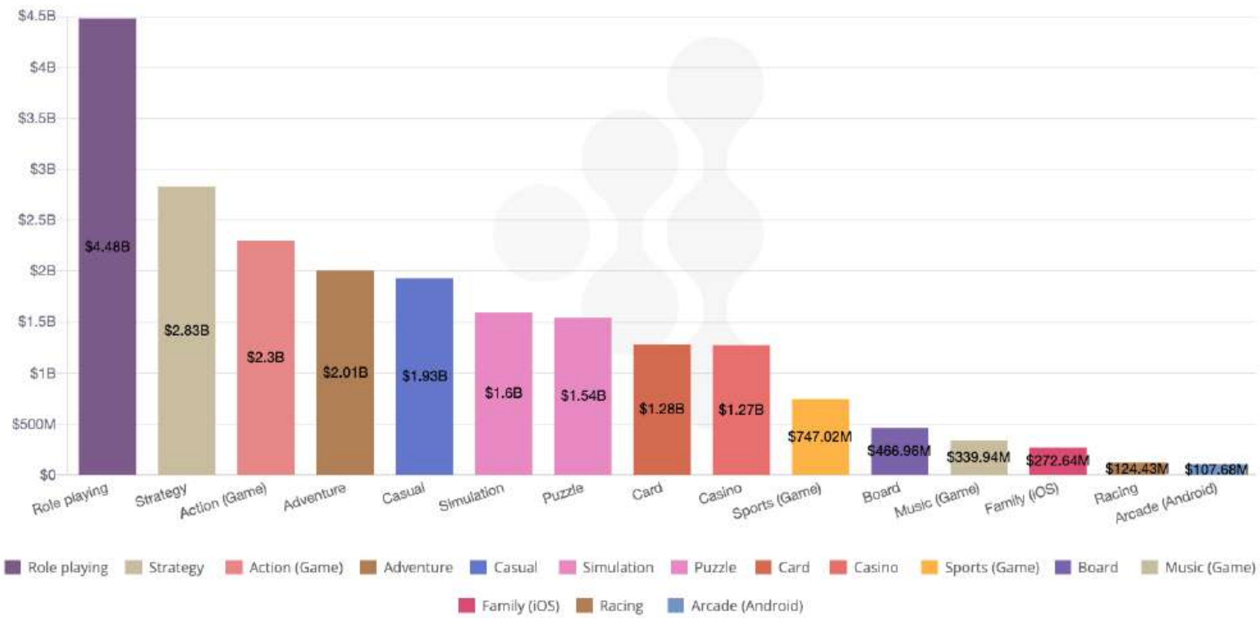
Almost all genres demonstrate a decline in downloads compared to 1H 2022. Within top-5 genres Casual gain the first position in terms of share (+0,62%) with total downloads going down from 4.24B to 4.14B.



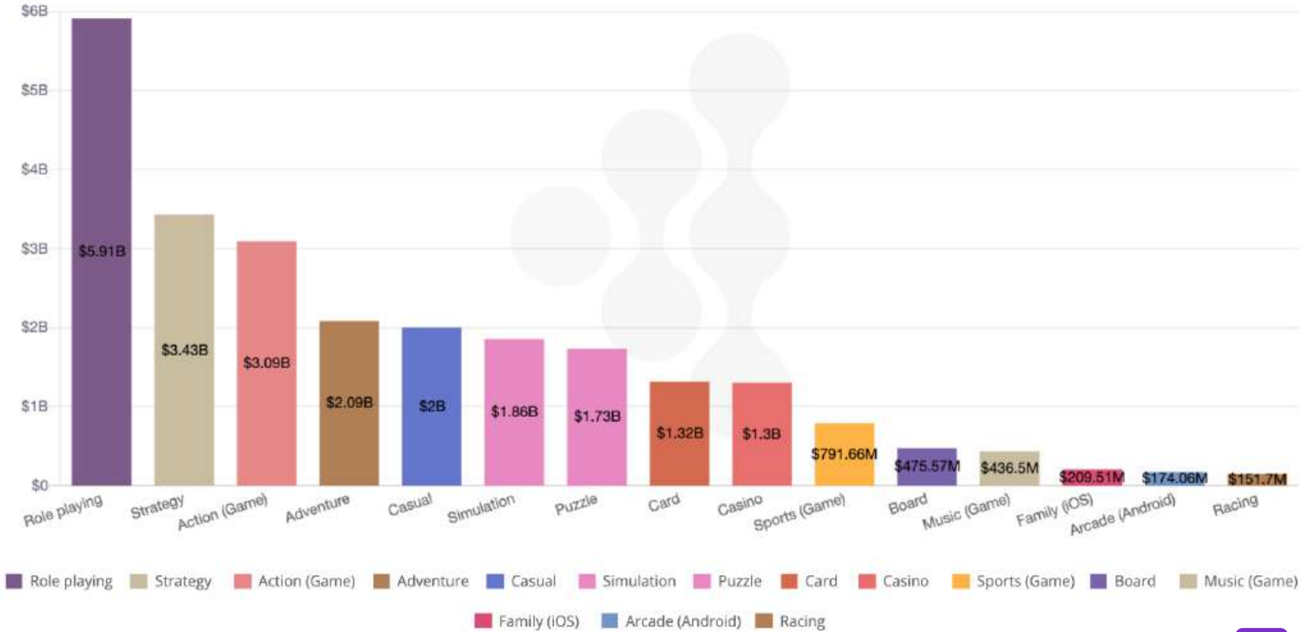
The same pattern applies to Action (drop from 4.29B to 3.9B) that loses its share by 0,18%, Simulation (-50M), Arcade (-24M). Puzzles shows a positive trend with +90M downloads and +0,57% of share. Casino and Card are also among the categories with upward dynamic (+121M and +87M)

Subcategories in gaming | Revenue

1H 2023

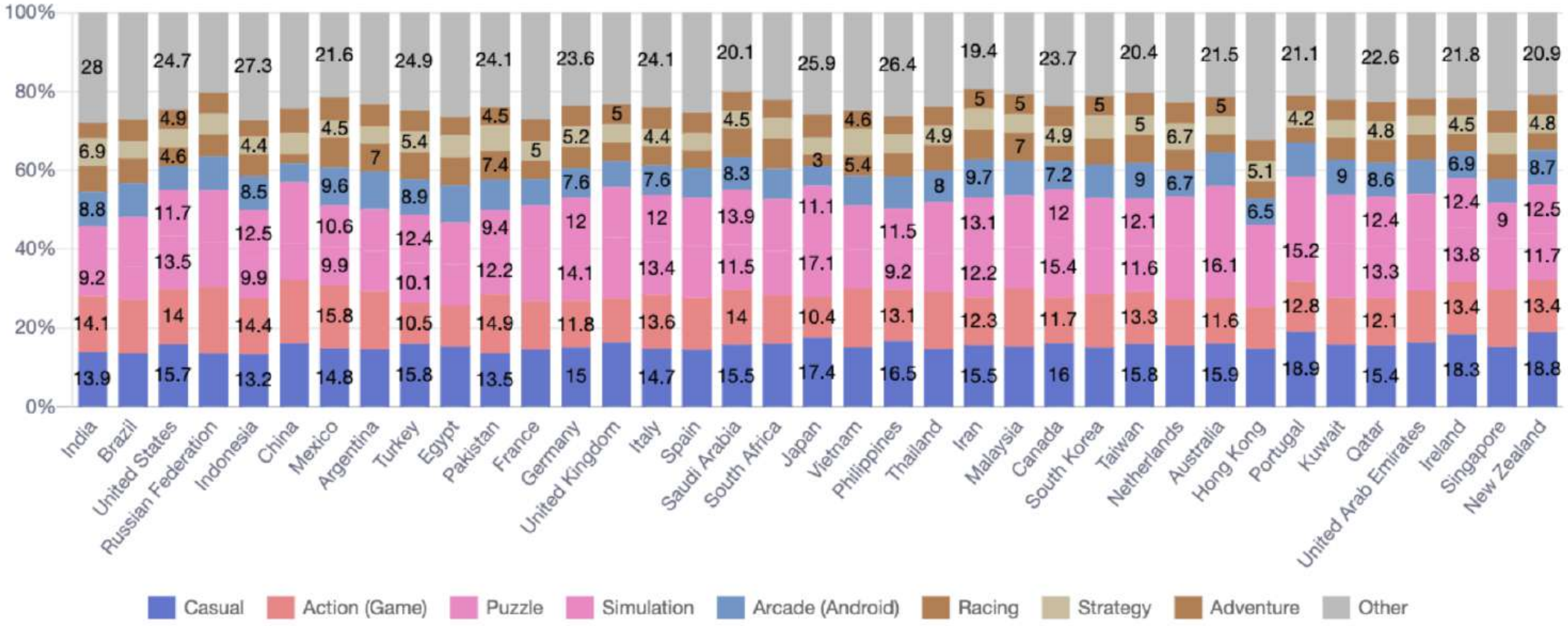


1H 2022



RPG demonstrates a gradual decline in the past two years, with revenue falling from $5.9B in the first half of 2022 to $4.4B in the first half of 2023 (-3,2% of total share). However, RPG still ranks as the largest genre. All other genres demonstrate a negative revenue trend as well.

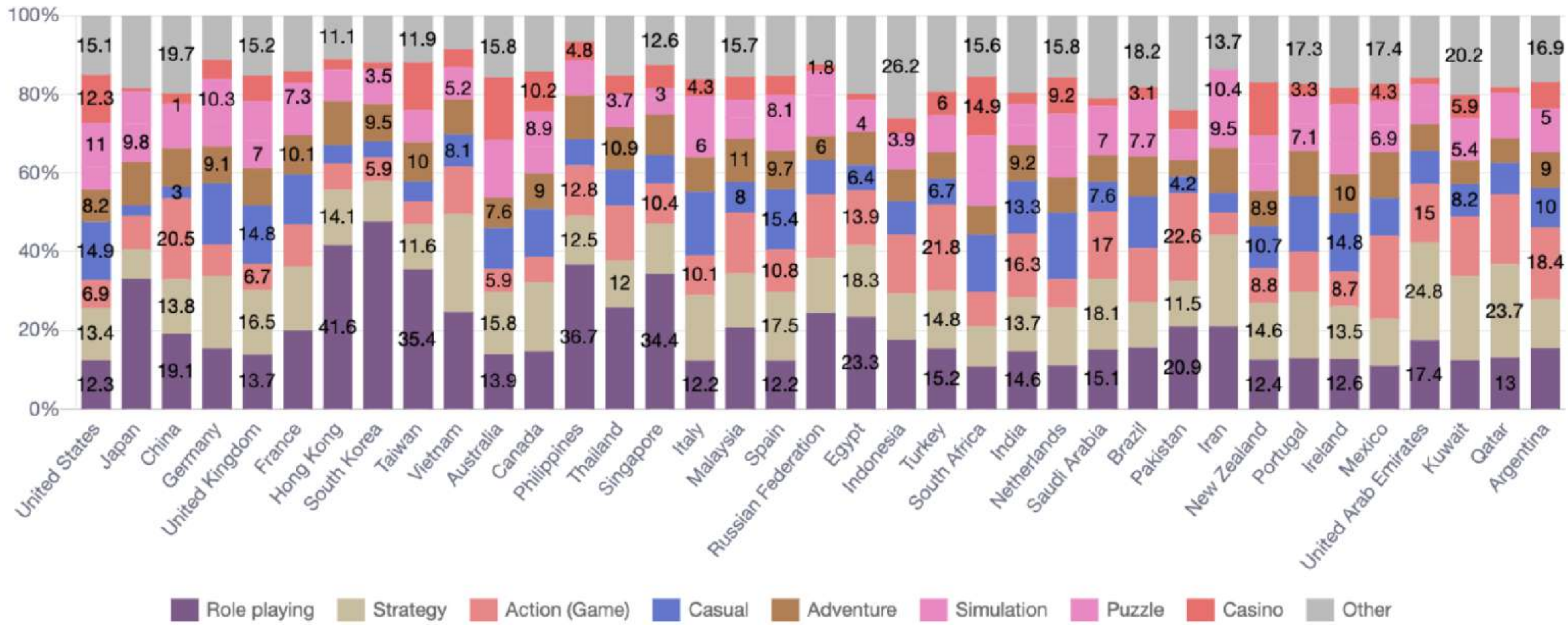
Downloads | Shares of subcategories



Casual takes the largest share in the most of countries, except for India, Brazil, Russia, Indonesia, China, Mexico, Argentina, Pakistan, Vietnam with Action, Australia with Puzzles (16%).

Puzzles category in Japan has a strong position alongside Casual (17,07%). Simulation is more popular in China compared to other countries in the list (15,6%). The largest shares of Casual are taken by Portugal, Ireland and New Zealand (around 18%).

Revenue | Shares of subcategories



RPG takes a lion share in Japan (33%), Hong Kong (41.6%), South Korea (47,6%), Taiwan (35,4%), Philippines (36,7%), Singapore (34,4%).
Action has a strong position in China (20,5%), Turkey (21,8%), Pakistan (22,6%), Mexico (21%). Large shares of Strategy are taken by Vietnam (24,9%), Iran (23,3%), UAE (24,8%), Kuwait (21,4%), Qatar (23,7%).

Top apps | Downloads

Android		Downloads
1.	Subway Surfers	116,5 M
2.	Candy Crush Saga	106,3 M
3.	Free Fire: 6th Anniversary	88 M
4.	Roblox	86,8 M
5.	Ludo King	84,3 M
6.	Free Fire MAX	68,6 M
7.	My Talking Tom 2	59,4 M
8.	My Talking Tom Friends	59,1 M
9.	FIFA Soccer	54,6M
10.	Block Blast Adventure Master	53,7 M

iOS		Downloads
1.	蛋仔派对	32,2 M
2.	Royal Match	20,2 M
3.	Roblox	19,5 M
4.	Discord - Chat, Talk&Hangout	19,5 M
5.	MONOPOLY GO!	19,1 M
6.	Gardenscapes	18,8 M
7.	Subway Surfers	17,5 M
8.	Block Blast Adventure Mater	12,9 M
9.	Attack Hole - Black Hole Games	12,4 M
10.	Parking Jam 3D	11,9 M

Total downloads of all apps: 95,4B. Gaming covers 29,6%

Top apps | Revenue

Android

#	App	Revenue (USD)
1.	Coin Master	228 M
2.	Candy Crush Saga	220 M
3.	Roblox	167 M
4.	Royal Match	134 M
5.	Genshin Impact	119 M
6.	Pokémon GO	113 M
7.	Gardenscapes	103 M
8.	ウマ娘 プリティーダービー	89 M
9.	Township	85 M
10.	Puzzles&Survival: Z Express	85 M

iOS

#	App	Revenue (USD)
1.	王者荣耀	766 M
2.	和平精英	344 M
3.	原神	209 M
4.	Roblox	194 M
5.	Royal Match	168 M
6.	Coin Master	168 M
7.	Candy Crush Saga	156 M
8.	Gardenscapes	154 M
9.	三国志·战略版	134 M
10.	モンスターストライク	133 M

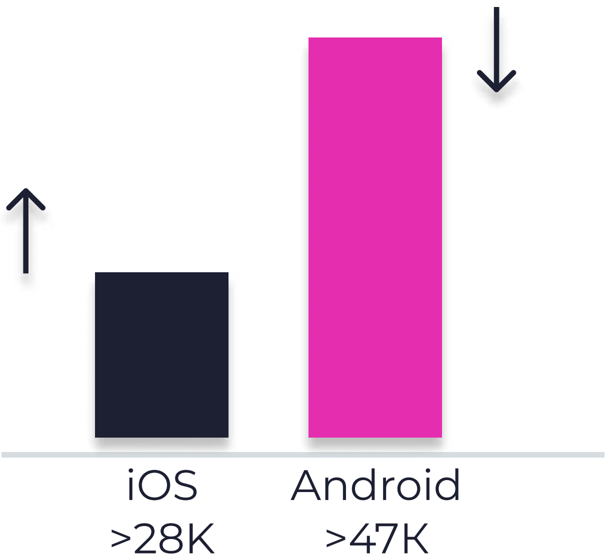
Total Revenue of all apps: $42B. Gaming covers 51%

Overview of Advertisers | All categories

Total number of advertisers: >75K

Number of Advertisers

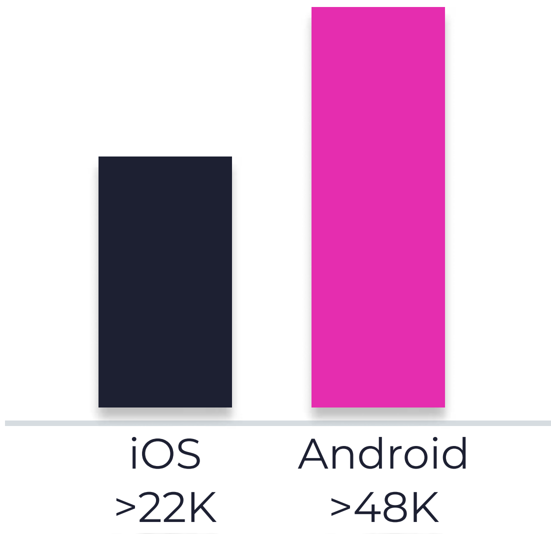
1st Half 2023



Total number of advertisers: >70K

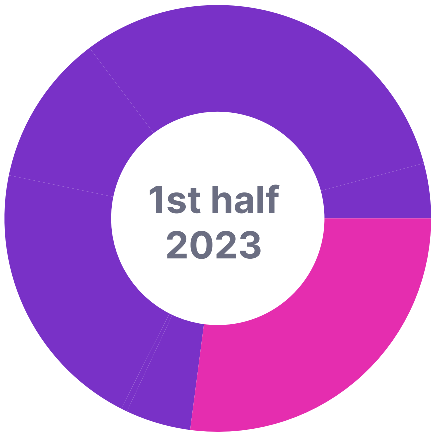
Number of Advertisers

1st Half 2022

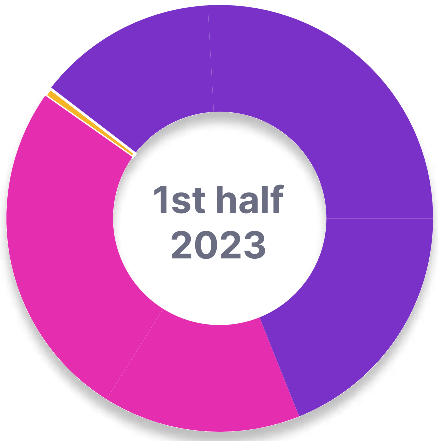


Distribution of ad creatives: platforms + format

Total number of creatives for the 1st half 2023: 15,8M



Overall



- **Android** – 70,5%
- **iOS** – 29,5%

- **Image** – 33%
- **Video** – 65% ↗
- **Interactive** – 2%

Gaming:

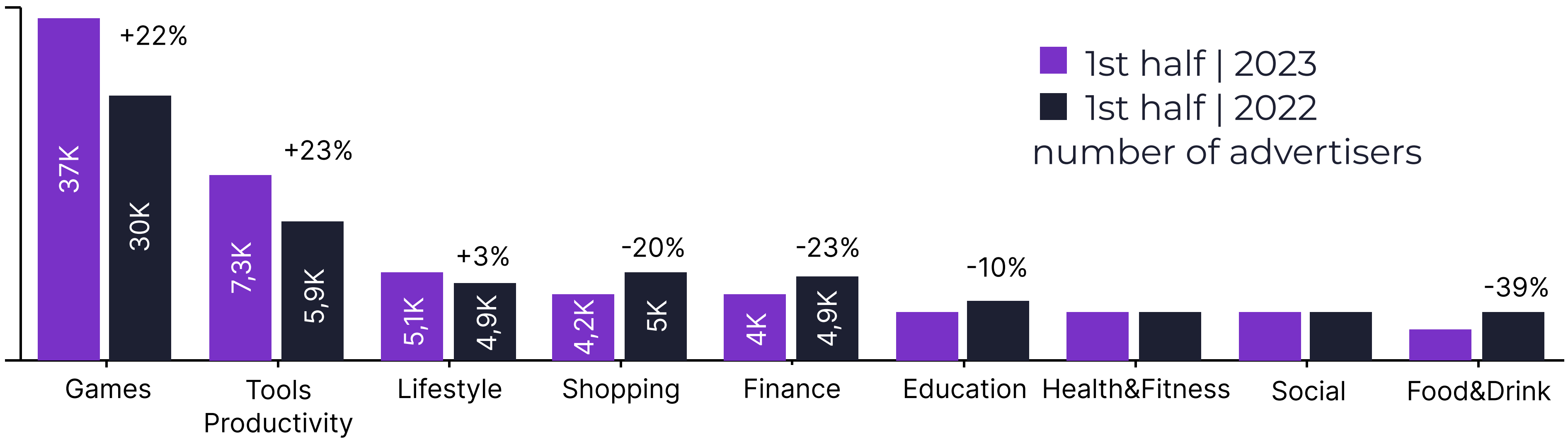
Number of creatives in gaming categories: 8,9M (56%)

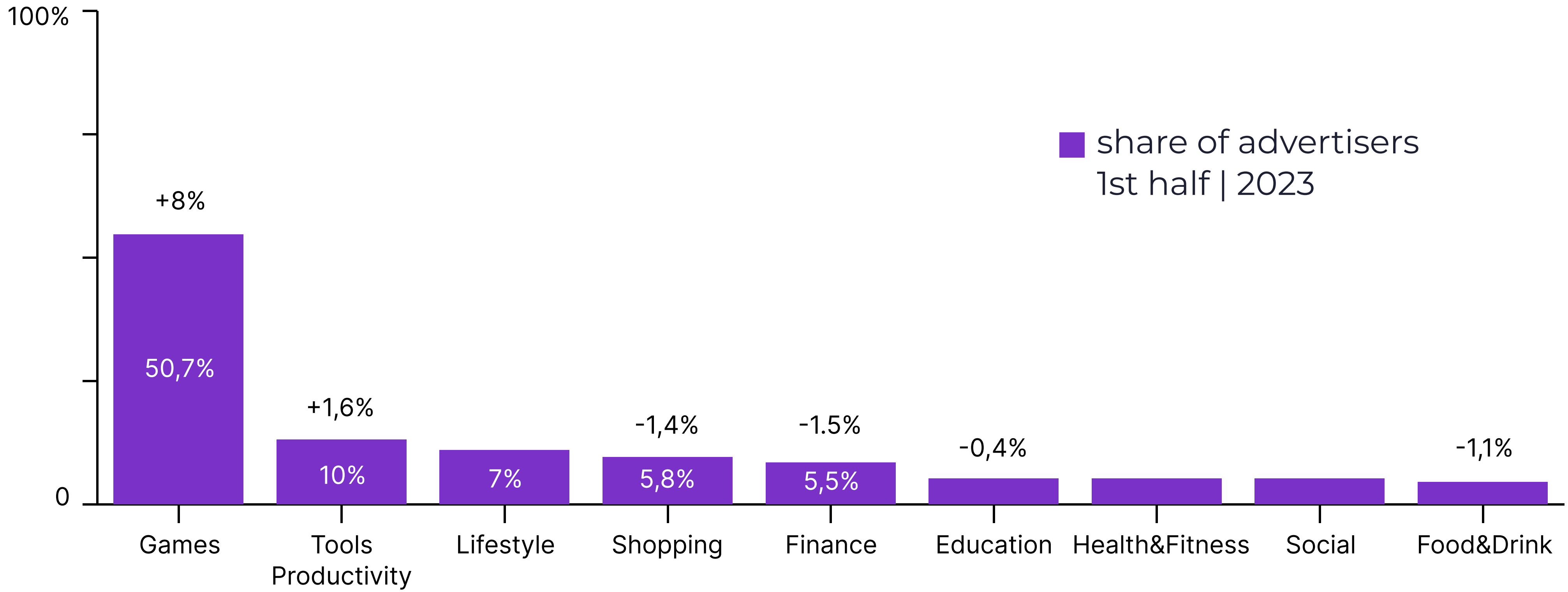
Video - 72%; Image - 25%; Interactive - 3%

Android: 68,6%

iOS: 31,4%

Number of advertisers per category





Key Takeaways

- Downloads: India (4,32B) remains the largest market for downloads, accumulating 15,29%. Brazil (2,99B) takes the second place surpassing the US (2.57B). Thailand (357,4M) left the ranking with a drastic drop (-8,6% compared to the first half of 2022). China (1.3B) gains a larger share (+0,96%) leaving behind Mexico (-0,5% | 1.19B). Egypt (+2,6% | 1.06B) and Argentina (+2,8% | 1.19B) join the list replacing Saudi Arabia (-0,3% | 447.8M) and Thailand.
- Revenue: The United States ($5,71B) continues to gain market share (+4% compared to the first half of 2022) along with Japan (+1,2% | $4,17B), China (+2%| $3.23B). South Korea experiences the biggest decline (-2,6% | $356.3M). While the Russian Federation leaves the Top-15 countries (-0,49% | $183M), South Africa (-0,7% | $163.3M), Vietnam (+0,35% | $324.3M) and Australia (+0,17% | $294.2M) join the list.
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- Gaming covers 29,6% of total downloads and 51% of total revenue.

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- Overall number of advertisers demonstrates a slight growth in iOS (+6K) and a drop in Android (-1K). Advertisers in gaming cover 50,7% of all advertisers that is by 8% more than in 1H 2022 (30K in 1H, 2022 vs 37K 1H, 2023, growth of 22%).

- Video format takes the biggest share among all categories (65%), followed by images (33%) and interactive (2%). In general, the trend of video format expansion remains in 2023. In mobile games, advertisers are even more keen on using videos (72%).

- In total, gaming apps generated 8.9M creatives that equals to 56% of the total number of all creatives. 68,6% of the creatives are running on Android and 31,4% - on iOS.

Apptica

Providing the most accurate data on applications, publishers and ad creatives since 2017