

South East Asian Mobile Game Market Insights 2024



Sensor Tower Introduction/Overview

This report provides an in-depth analysis of the App Store and Google Play mobile game markets in Southeast Asian in 2024, covering the overall revenue and download trends in these markets, revenue shares and trends across top game genres, download and revenue changes across different countries, as well as top mobile games by revenue and downloads. Through case study, this report will also help you decode how top games successfully penetrated the Southeast Asian markets.

Clarification on Revenue and Downloads Data

Sensor Tower's revenue figures are derived from estimated in-app purchase (IAP) revenue on the App Store and Google Play, excluding ad revenue, revenue from third-party Android app-store sales, and direct payment revenue from developers' websites and other channels. Unless explicitly stated as net revenue, the revenue figures shown represent gross revenue (before platform deduction).

Sensor Tower's downloads figures are derived from estimated downloads on the App Store and Google Play, excluding pre-installs, duplicate downloads, and downloads from third-party Android app-store. Google Play is not available in Mainland China.



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Overview of the Southeast Asian Mobile Game Market

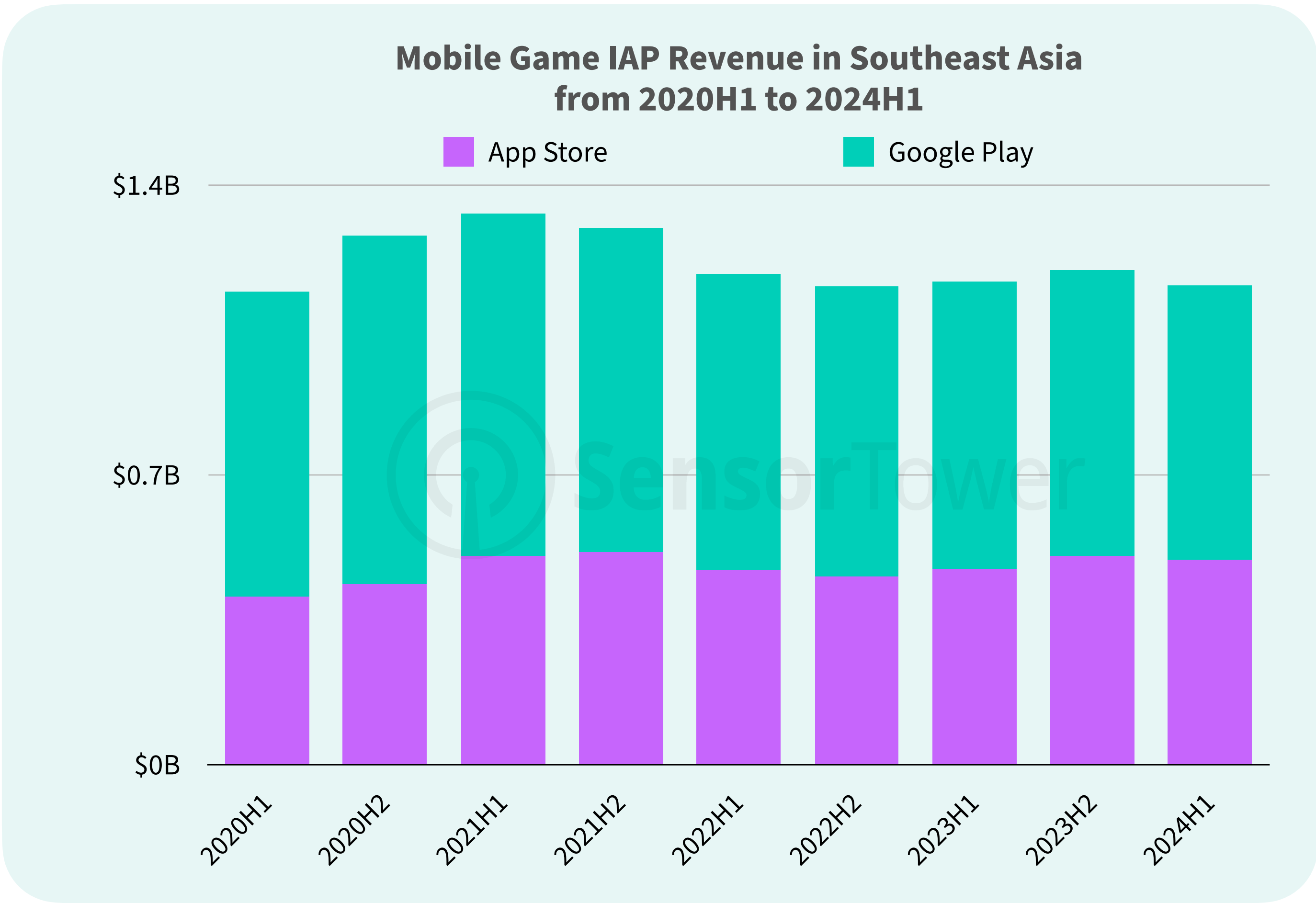
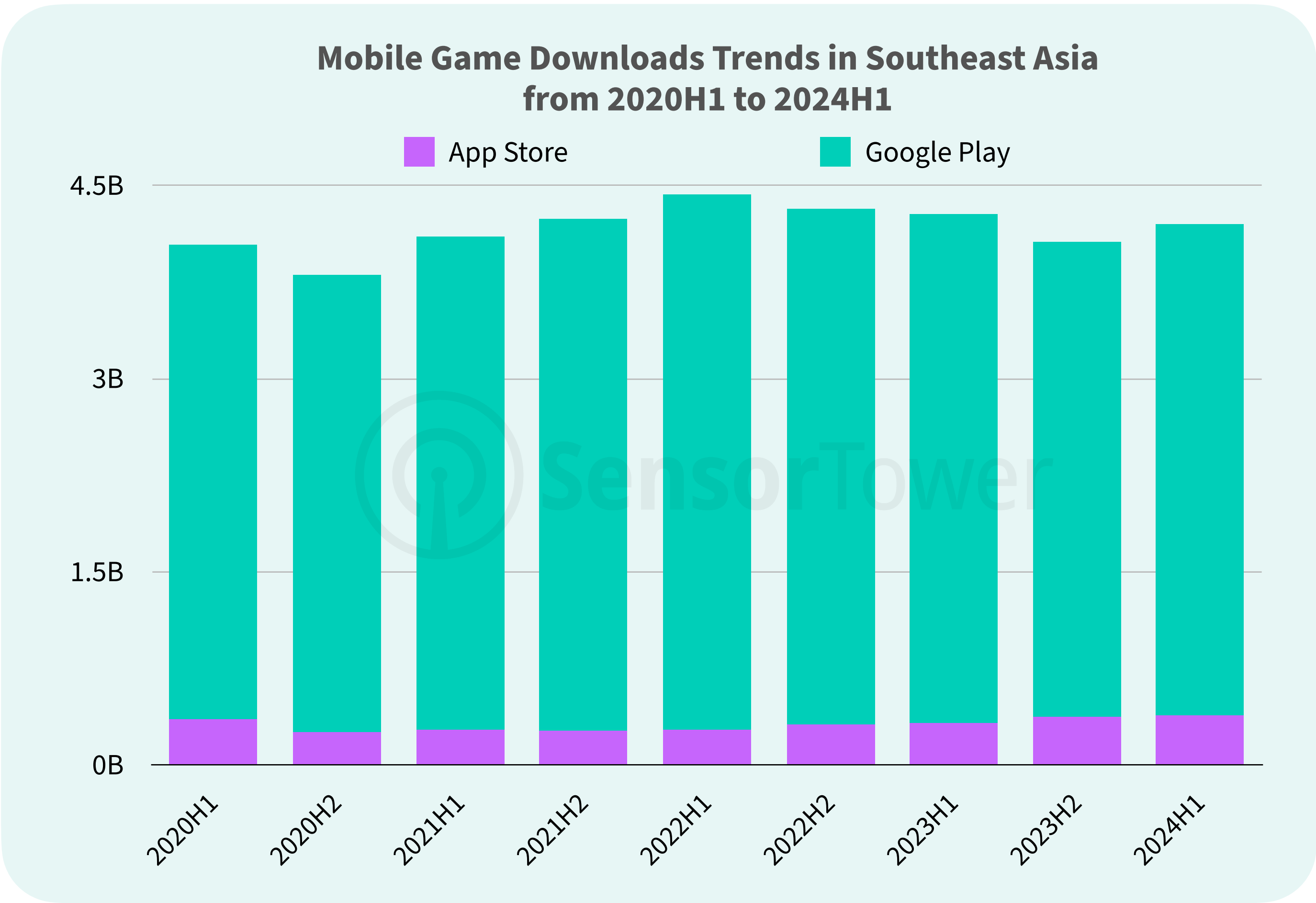


In the first half of 2024, mobile game downloads in Southeast Asia increased by 3.4% compared to the previous half-year period, reaching 4.2 billion, with 91% coming from Google Play

Note: Data as of June 2024. Source: Sensor Tower Store Intelligence
Sensor Tower's download data is derived from estimated downloads on the App Store and Google Play, excluding pre-installs, duplicate downloads, and downloads from third-party Android app-store. Google Play is not available in Mainland China.

During the first half of 2024, mobile game downloads in the Southeast Asian market rose by 3.4% compared to the previous half-year, totalling 4.2 billion downloads, of which 91% were from Google Play.

In the first half of 2024, the IAP revenue of mobile games in the Southeast Asian market decreased slightly by 3.0% compared to previous half-year to \$1.16 billion, close to the level in 2020H1. Google Play revenue accounted for 57% of the total.



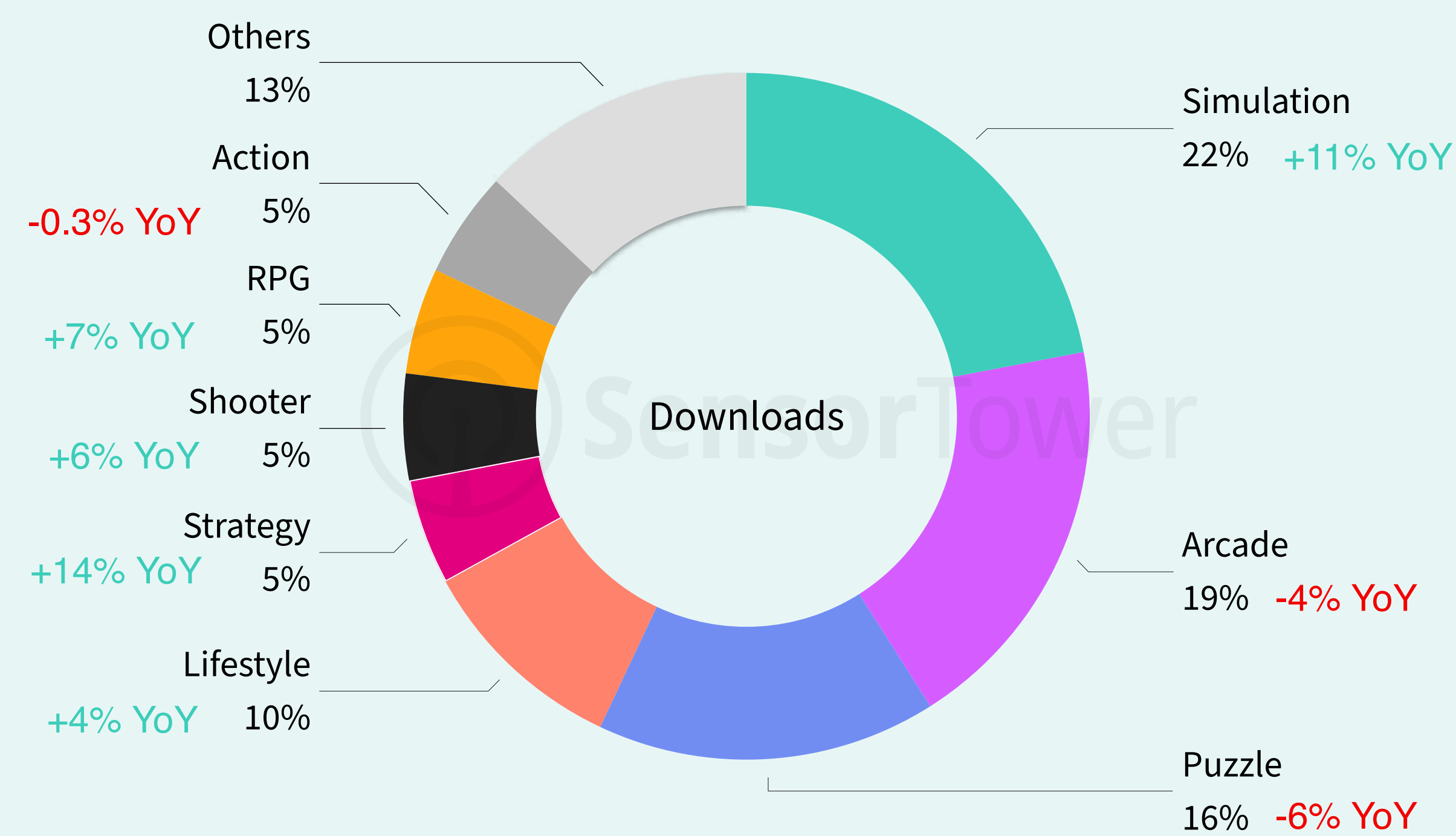
From January to August 2024, downloads of mid-core mobile games in the Southeast Asian market grew significantly, while revenue from sports mobile games increased by 39% period-over-period

Note: Data as of August 2024. Source: Sensor Tower Store Intelligence
Sensor Tower's download data is derived from estimated downloads on the App Store and Google Play, excluding pre-installs, duplicate downloads, and downloads from third-party Android app-store. Google Play is not available in Mainland China.

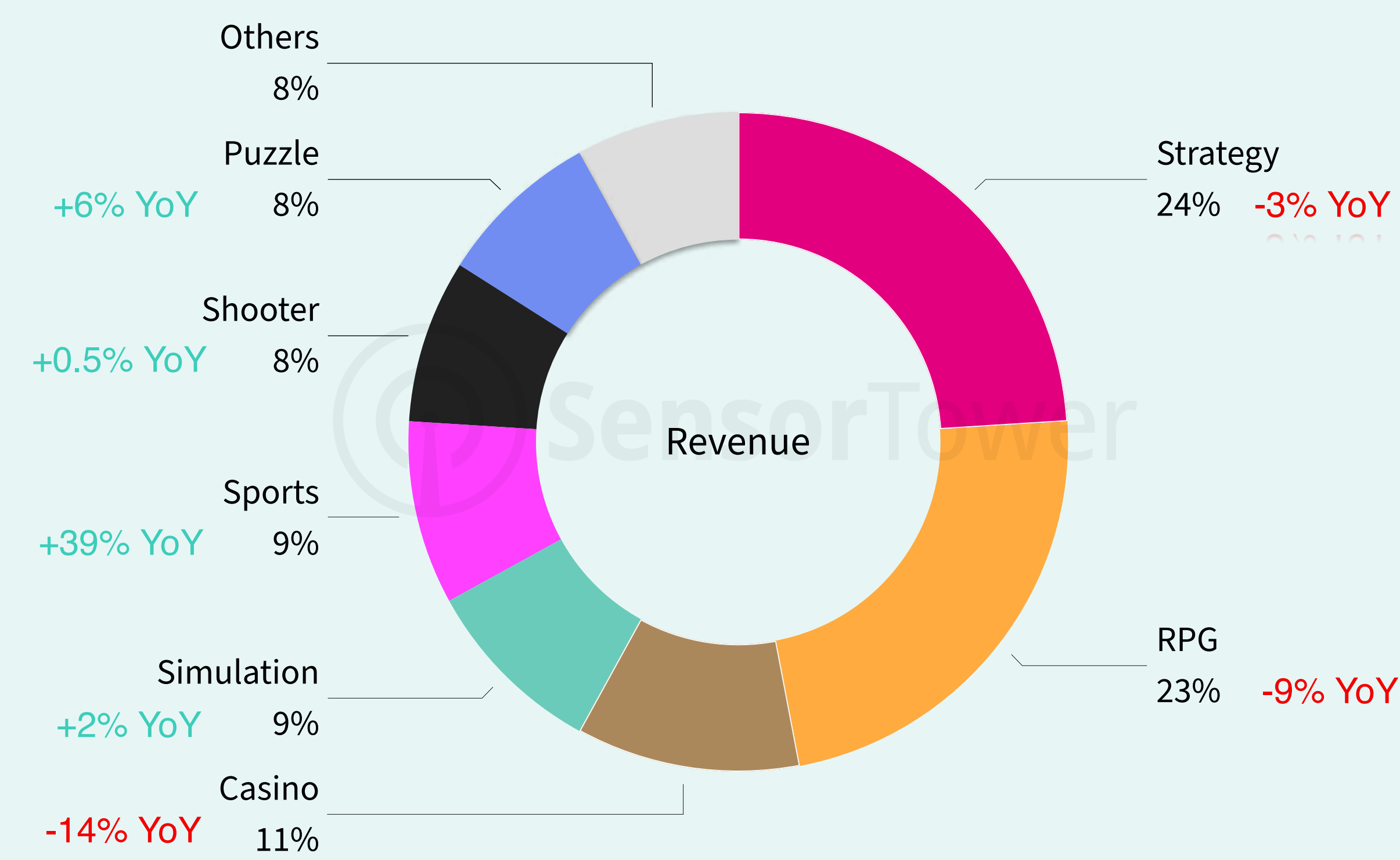
Between January and August 2024, simulation, arcade, puzzle, and lifestyle mobile games accounted for 67% of the total downloads in the Southeast Asian market. Specifically, downloads of simulation, strategy, shooting, and RPG mobile games grew by 11%, 14%, 6%, and 7%, respectively.

On the revenue side, strategy and RPG mobile games collectively accounted for 47% of total, though they experienced period-over-period declines of 3% and 9%, respectively. Meanwhile, revenue from sports mobile games spiked by 39% period-over-period, accounting for 9% of the total mobile game revenue in Southeast Asia.

Mobile Games Downloads Share in Southeast Asia by Genre (January-August 2024)



Mobile Game IAP Revenue Share in Southeast Asia Market by Genre (January-August 2024)

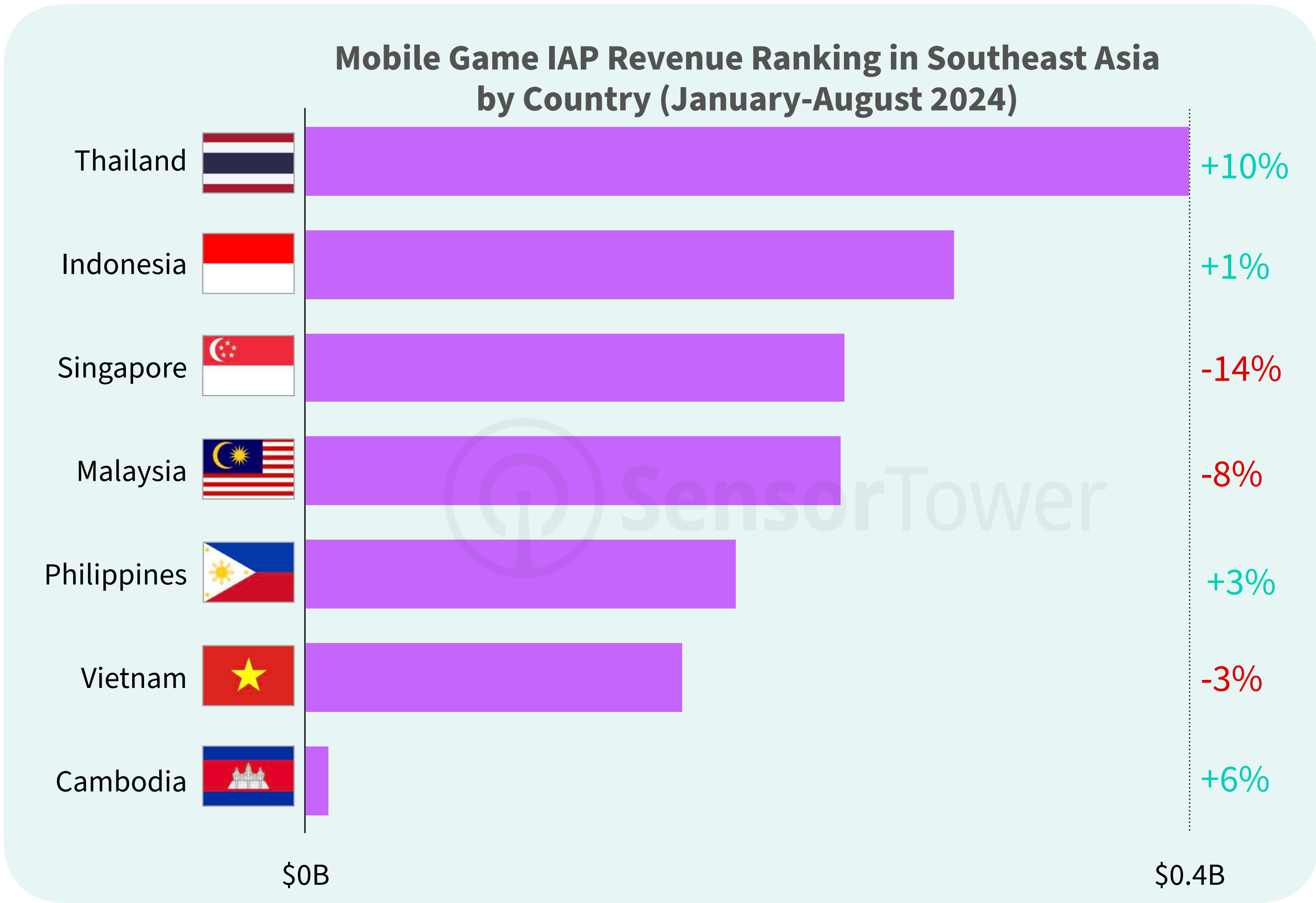
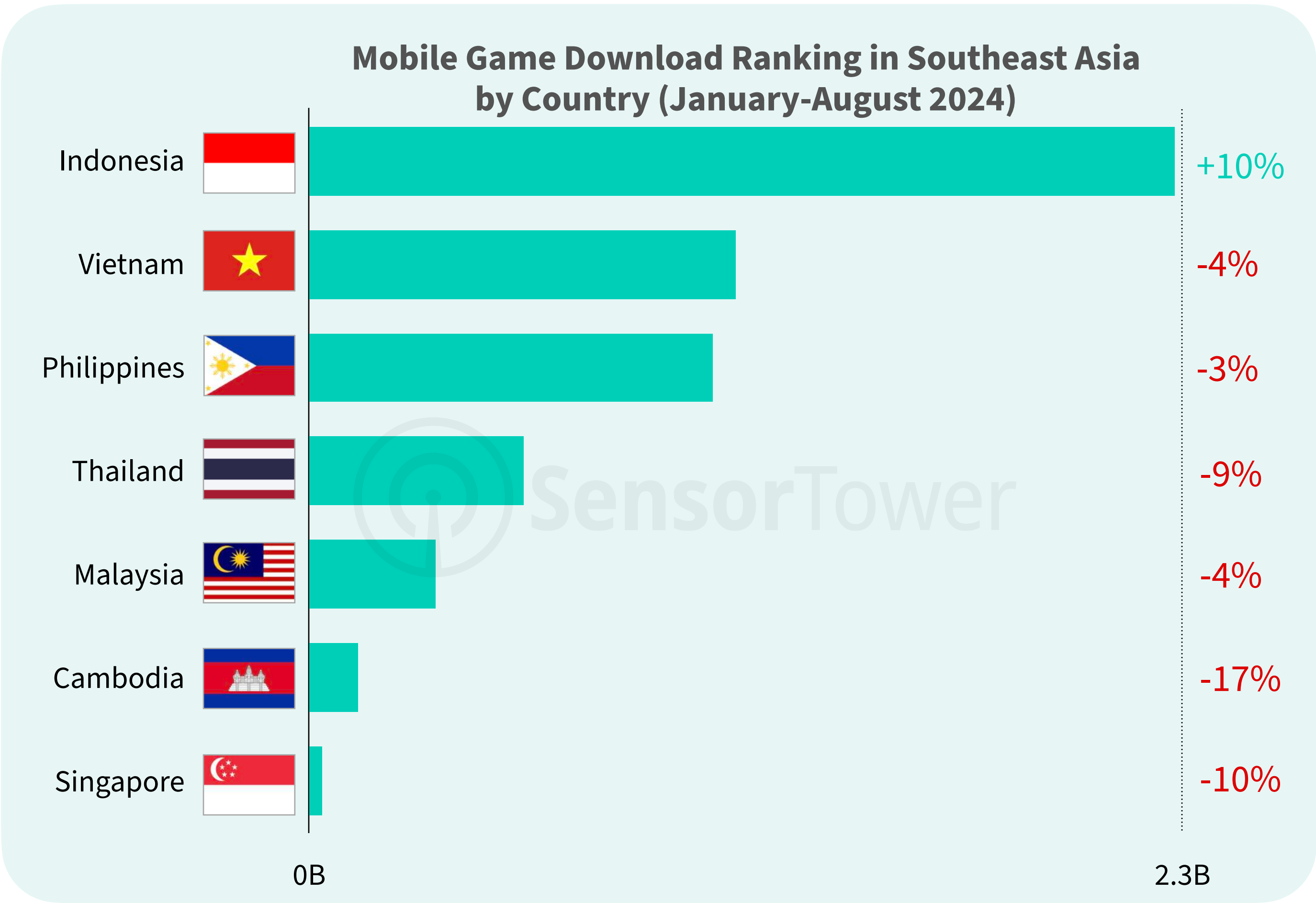


Indonesia is the largest market for mobile game downloads in Southeast Asia, with a 10% period-over-period growth in downloads during the first eight months of 2024

Note: Data as of August 2024. Source: Sensor Tower Store Intelligence
Sensor Tower's download data is derived from estimated downloads on the App Store and Google Play, excluding pre-installs, duplicate downloads, and downloads from third-party Android app-store. Google Play is not available in Mainland China.

In the Southeast Asian region, Indonesia is the market with the largest mobile game downloads. From January to August 2024, its downloads increased by 10% period-over-period, reaching nearly 2.3 billion and accounting for more than 41% of the total.

Thailand and Indonesia are the highest-earning markets for mobile games in Southeast Asia, generating \$400 million and \$300 million respectively from January to August 2024. Notably, Thailand's mobile game revenue increased by 10% period-over-period.













Top Mobile Games in Southeast Asia











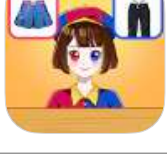

Garena Free Fire continues to dominate mobile game downloads and downloads growth in Southeast Asia

Top 10 Mobile Games in Southeast Asia by Downloads and Downloads Growth from January to August 2024. Source: Sensor Tower Store Intelligence. Sensor Tower's download data is derived from estimated downloads on the App Store and Google Play, excluding pre-installs, duplicate downloads, and downloads from third-party Android app-store. Google Play is not available in Mainland China.

Downloads Ranking

1		Garena Free Fire Garena Games Online
2		Mobile Legends: Bang Bang Moonton
3		Roblox Roblox Corporation
4		8 Ball Pool Miniclip
5		Stick Party 234 MiniGames PlayMax Game Studio
6		Subway Surfers Miniclip
7		Moto Rider, Bike Racing Game Zego Studio
8		Pizza Ready! Supercent
9		SAKURA School Simulator Garusoft
10		Block Blast! Hungry Studio

Downloads Growth Ranking

1		Garena Free Fire Garena Games Online
2		Pizza Ready! Supercent
3		Honor of Kings Tencent
4		Ojol The Game CodeXplore
5		Manage Supermarket Simulator Zego Studio
6		Mobile Legends: Bang Bang Moonton
7		Moto Rider, Bike Racing Game Zego Studio
8		Offline Games - No Wifi Games JindoBlu
9		Left or right: Magic Dress up ABI Games Studio
10		Brain Puzzle King Mangoing Game Studio

During the period from January to August 2024, Garena Free Fire achieved a 54% period-over-period increase in downloads in the Southeast Asian market, maintaining its leading position in both the downloads and download growth charts.

Moonton's MOBA mobile game, Mobile Legends: Bang Bang, recorded a 45% period-over-period growth in downloads, firmly holding the second place in the downloads chart.

Supercell's simulation game, Pizza Ready!, experienced a nearly sixfold increase in downloads period-over-period, ranking eighth in the downloads chart and second in the download growth chart.









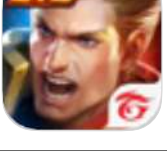

Tencent's MOBA mobile game, Honor of Kings, launched in the Southeast Asian market in June 2024 and quickly climbed to the top of the Google Play downloads charts in countries like Indonesia, securing the third position in the Southeast Asian mobile game downloads growth chart from January to August.













Mobile Legends: Bang Bang remains the top-grossing mobile game, while eFootball™ 2024 leads the revenue growth rankings

Top 10 Mobile Games in Southeast Asia by Revenue and Revenue Growth from January to August 2024. Source: Sensor Tower Store Intelligence. Sensor Tower's revenue figures are derived from estimated in-app purchase (IAP) revenue on the App Store and Google Play, excluding ad revenue, revenue from third-party Android app-store sales, and direct payment revenue from developers' websites and other channels.

Revenue Ranking

1		Mobile Legends: Bang Bang Moonton
2		eFootball™ 2024 Konami
3		Garena Free Fire Garena Games Online
4		Roblox Roblox Corporation
5		Coin Master Moon Active
6		EA SPORTS FC™ Mobile Soccer Electronic Arts
7		MONOPOLY GO! Scopely
8		Candy Crush Saga Activision Blizzard
9		Arena of Valor Garena Games Online
10		Last War:Survival FirstFun

Revenue Growth Ranking

1		eFootball™ 2024 Konami
2		Last War:Survival FirstFun
3		Legend of Mushroom Joy Net Games
4		Whiteout Survival Century Games
5		NIGHT CROWS Wemade
6		Solo Leveling:Arise Netmarble Games Corp.
7		Garena Free Fire Garena Games Online
8		Love and Deepspace INFOLD
9		Mobile Legends: Bang Bang Moonton
10		EA SPORTS FC™ Mobile Soccer Electronic Arts

Moonton's MOBA mobile game, Mobile Legends: Bang Bang, experienced a 6% period-over-period increase in revenue in the Southeast Asian market, maintaining its position at the top of the revenue chart.
























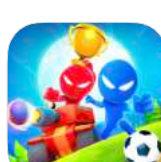
















Konami's sports mobile game, eFootball™ 2024, led the revenue growth chart with a remarkable surge of nearly 90% in period-over-period revenue in Southeast Asia from January to August 2024, securing the second position overall on the revenue chart.

In early March 2024, Joy Net Games' RPG, Legend of Mushroom, rapidly ascended to the top of the App Store and Google Play download charts in markets such as Thailand and Vietnam. By August 2024, the game had generated over \$11 million in revenue across Southeast Asian markets, ranking third on the growth chart, with Thailand and Vietnam each contributing over 25% of total revenue.



Top 10 Mobile Games by Downloads in Indonesia, Thailand, Vietnam, and the Philippines from January to August 2024



























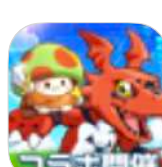
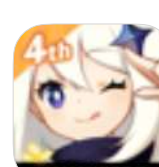












Note: Data for January to August 2024. Source: Sensor Tower Store Intelligence. Sensor Tower's download data is derived from estimated downloads on the App Store and Google Play, excluding pre-installs, duplicate downloads, and downloads from third-party Android app-store. Google Play is not available in Mainland China.

Indonesia	Thailand	Vietnam	Philippines
<div>1</div> <div></div> <div>Garena Free Fire</div> <div>Garena Games Online</div>	<div>1</div> <div></div> <div>Garena Free Fire</div> <div>Garena Games Online</div>	<div>1</div> <div></div> <div>Garena Free Fire</div> <div>Garena Games Online</div>	<div>1</div> <div></div> <div>Mobile Legends: Bang Bang</div> <div>Moonton</div>
<div>2</div> <div></div> <div>Mobile Legends: Bang Bang</div> <div>Moonton</div>	<div>2</div> <div></div> <div>Roblox</div> <div>Roblox Corporation</div>	<div>2</div> <div></div> <div>Roblox</div> <div>Roblox Corporation</div>	<div>2</div> <div></div> <div>Roblox</div> <div>Roblox Corporation</div>
<div>3</div> <div></div> <div>Roblox</div> <div>Roblox Corporation</div>	<div>3</div> <div></div> <div>Arena of Valor</div> <div>Garena Games Online</div>	<div>3</div> <div></div> <div>Arena of Valor</div> <div>Garena Games Online</div>	<div>3</div> <div></div> <div>8 Ball Pool</div> <div>Miniclip</div>
<div>4</div> <div></div> <div>Stick Party 234 MiniGames</div> <div>PlayMax Game Studio</div>	<div>4</div> <div></div> <div>Subway Surfers</div> <div>Miniclip</div>	<div>4</div> <div></div> <div>Giang Hồ Ngũ Tuyệt</div> <div>VTC Mobile</div>	<div>4</div> <div></div> <div>Block Blast!</div> <div>Hungry Studio</div>
<div>5</div> <div></div> <div>Ojol The Game</div> <div>CodeXplore</div>	<div>5</div> <div></div> <div>EA SPORTS FC™ Mobile Soccer</div> <div>Electronic Arts</div>	<div>5</div> <div></div> <div>Brain Puzzle King</div> <div>Mangoing Game Studio</div>	<div>5</div> <div></div> <div>Tongits Go - Mines Pusoy</div> <div>Playjoy</div>
<div>6</div> <div></div> <div>SAKURA School Simulator</div> <div>Garusoft</div>	<div>6</div> <div></div> <div>Mobile Legends: Bang Bang</div> <div>Moonton</div>	<div>6</div> <div></div> <div>Play Together</div> <div>HAEGIN</div>	<div>6</div> <div></div> <div>Stick Party 234 MiniGames</div> <div>PlayMax Game Studio</div>
<div>7</div> <div></div> <div>Subway Surfers</div> <div>Miniclip</div>	<div>7</div> <div></div> <div>8 Ball Pool</div> <div>Miniclip</div>	<div>7</div> <div></div> <div>ZingPlay</div> <div>VNG CORPORATION</div>	<div>7</div> <div></div> <div>Call of Duty®: Mobile</div> <div>Activision Blizzard & VNG Game Studios</div>
<div>8</div> <div></div> <div>Honor of Kings</div> <div>Tencent</div>	<div>8</div> <div></div> <div>Pizza Ready!</div> <div>Supercent</div>	<div>8</div> <div></div> <div>Talking Tom Gold Run</div> <div>Jinke</div>	<div>8</div> <div></div> <div>Subway Surfers</div> <div>Miniclip</div>
<div>9</div> <div></div> <div>Moto Rider, Bike Racing Game</div> <div>Zego Studio</div>	<div>9</div> <div></div> <div>SAKURA School Simulator</div> <div>Garusoft</div>	<div>9</div> <div></div> <div>Mộng Kiếm Tiêu Dao</div> <div>VGP Company</div>	<div>9</div> <div></div> <div>Pooking - Billiards City</div> <div>MOUNTAIN GAME</div>
<div>10</div> <div></div> <div>Avatar World</div> <div>Pazu Games</div>	<div>10</div> <div></div> <div>Hay Day</div> <div>Supercell</div>	<div>10</div> <div></div> <div>Die Again: Troll Game Ever</div> <div>JaCat Games Studio</div>	<div>10</div> <div></div> <div>Mines Land</div> <div>Playjoy PH</div>



Top 10 Mobile Games by Revenue in Indonesia, Thailand, Vietnam, and the Philippines from January to August 2024

Note: Data for January to August 2024. Source: Sensor Tower Store Intelligence. Sensor Tower's revenue figures are derived from estimated in-app purchase (IAP) revenue on the App Store and Google Play, excluding ad revenue, revenue from third-party Android app-store sales, and direct payment revenue from developers' websites and other channels.

Indonesia	Thailand	Vietnam	Philippines
<div>1</div> <div></div> <div>Mobile Legends: Bang Bang</div> <div>Moonton</div>	<div>1</div> <div></div> <div>eFootball™ 2024</div> <div>Konami</div>	<div>1</div> <div></div> <div>Coin Master</div> <div>Moon Active</div>	<div>1</div> <div></div> <div>Mobile Legends: Bang Bang</div> <div>Moonton</div>
<div>2</div> <div></div> <div>Garena Free Fire</div> <div>Garena Games Online</div>	<div>2</div> <div></div> <div>EA SPORTS FC™ Mobile Soccer</div> <div>Electronic Arts</div>	<div>2</div> <div></div> <div>Garena Free Fire</div> <div>Garena Games Online</div>	<div>2</div> <div></div> <div>Roblox</div> <div>Roblox Corporation</div>
<div>3</div> <div></div> <div>Roblox</div> <div>Roblox Corporation</div>	<div>3</div> <div></div> <div>Arena of Valor</div> <div>Garena Games Online</div>	<div>3</div> <div></div> <div>Arena of Valor</div> <div>Garena Games Online</div>	<div>3</div> <div></div> <div>Call of Duty®: Mobile</div> <div>Activision Blizzard & VNG Game Studios</div>
<div>4</div> <div></div> <div>eFootball™ 2024</div> <div>Konami</div>	<div>4</div> <div></div> <div>Garena Free Fire</div> <div>Garena Games Online</div>	<div>4</div> <div></div> <div>Rise of Kingdoms</div> <div>Lilith Games</div>	<div>4</div> <div></div> <div>NIGHT CROWS</div> <div>Wemade</div>
<div>5</div> <div></div> <div>EA SPORTS FC™ Mobile Soccer</div> <div>Electronic Arts</div>	<div>5</div> <div></div> <div>Coin Master</div> <div>Moon Active</div>	<div>5</div> <div></div> <div>Roblox</div> <div>Roblox Corporation</div>	<div>5</div> <div></div> <div>Last War:Survival Game</div> <div>First Fun</div>
<div>6</div> <div></div> <div>PUBG MOBILE</div> <div>Tencent</div>	<div>6</div> <div></div> <div>Roblox</div> <div>Roblox Corporation</div>	<div>6</div> <div></div> <div>Candy Crush Saga</div> <div>Activision Blizzard</div>	<div>6</div> <div></div> <div>Clash of Clans</div> <div>Supercell</div>
<div>7</div> <div></div> <div>Last War:Survival Game</div> <div>First Fun</div>	<div>7</div> <div></div> <div>Candy Crush Saga</div> <div>Activision Blizzard</div>	<div>7</div> <div></div> <div>Legend of Mushroom</div> <div>Joy Net Games</div>	<div>7</div> <div></div> <div>Genshin Impact</div> <div>miHoYo</div>
<div>8</div> <div></div> <div>Clash of Clans</div> <div>Supercell</div>	<div>8</div> <div></div> <div>PUBG MOBILE</div> <div>Tencent</div>	<div>8</div> <div></div> <div>Nobody's Adventure Chop-Chop</div> <div>37 Games</div>	<div>8</div> <div></div> <div>Coin Master</div> <div>Moon Active</div>
<div>9</div> <div></div> <div>Candy Crush Saga</div> <div>Activision Blizzard</div>	<div>9</div> <div></div> <div>LINE Let's Get Rich</div> <div>Netmarble Games Corp.</div>	<div>9</div> <div></div> <div>PUBG MOBILE</div> <div>Tencent</div>	<div>9</div> <div></div> <div>Candy Crush Saga</div> <div>Activision Blizzard</div>
<div>10</div> <div></div> <div>Higgs Games Island</div> <div>PokerCity</div>	<div>10</div> <div></div> <div>Whiteout Survival</div> <div>Century Games</div>	<div>10</div> <div></div> <div>Zombie Waves</div> <div>Fun Formula</div>	<div>10</div> <div></div> <div>Ragnarok Origin Global</div> <div>GravityGameHub</div>



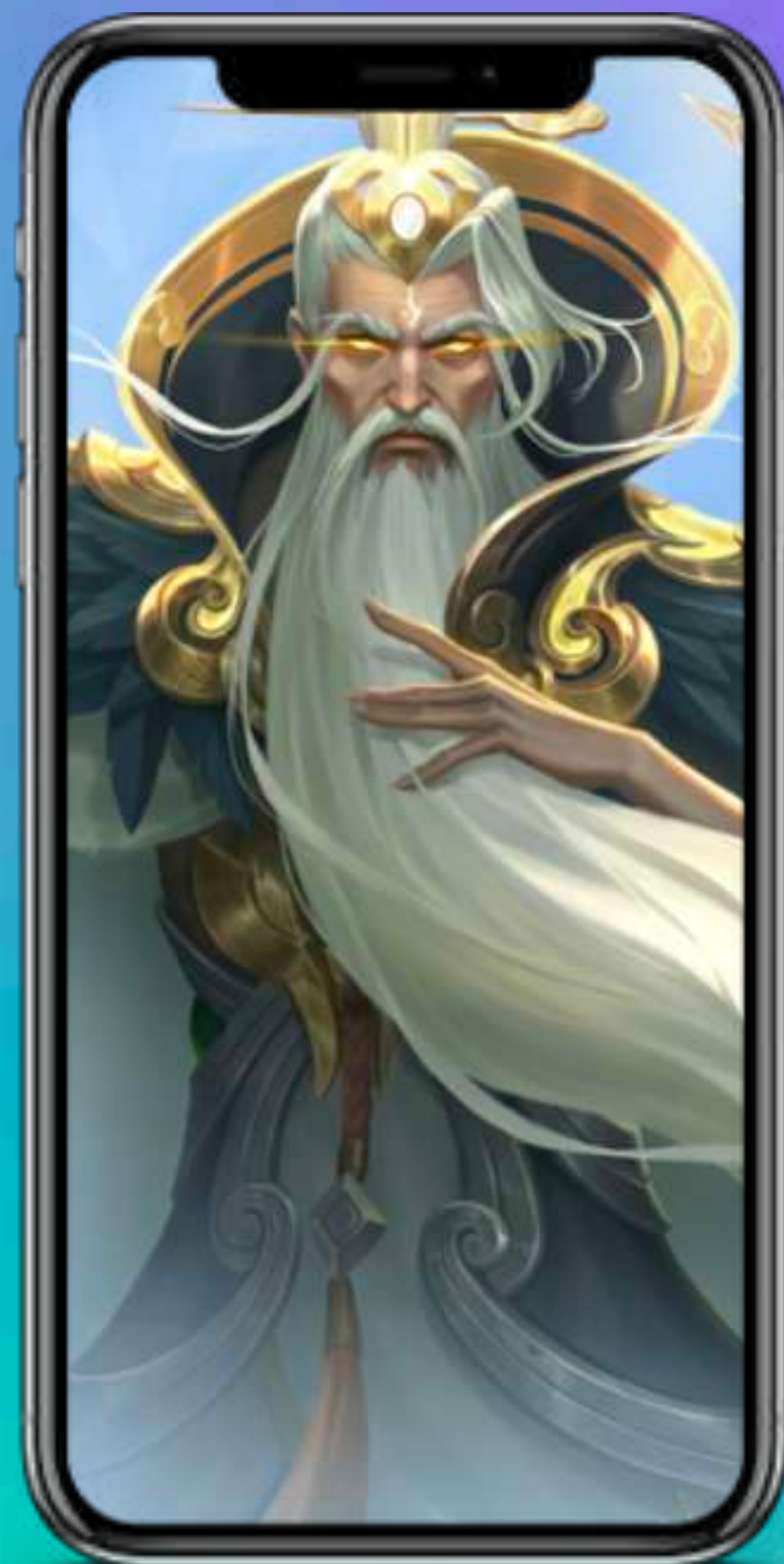
Case Study: Honor of Kings





Honor of Kings

Tencent



Game Overview

Release Date: October 2015 - China

March 2023 - Brazil

June 2024 - Southeast Asia

Art Style: Stylized Realistic

Camera POV: Top-Down

Monetization: Live Ops, Starter Pack,

Genre: Strategy

Sub-Genre: MOBA

Product Model: Mid-core

Setting: High Fantasy

Theme: Combat Arena

Currency Bundles, Loot Box,

Subscription

Game Tags: Character Collection, Social Clans,

PvP, Co-op

Source: Sensor Tower App Intelligence



Honor of Kings has established itself as the highest-grossing mobile game in the world, with total accumulated revenue reaching \$17 billion

As of the end of August 2024, Tencent's Honor of Kings has generated nearly \$17.2 billion in global cumulative revenue, establishing itself as the mobile game with the highest total revenue worldwide.

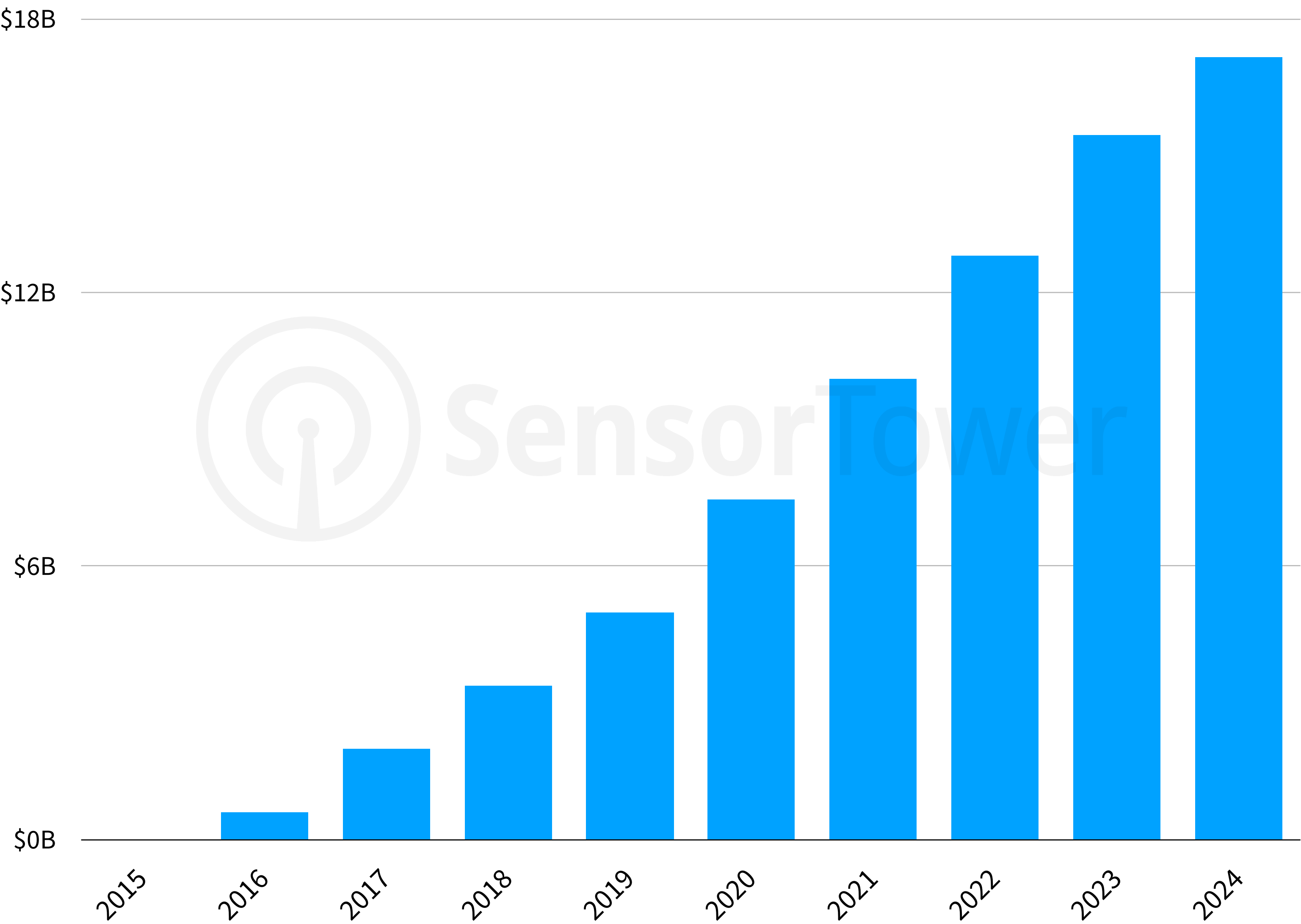
From 2019 to 2023, Honor of Kings consistently ranked as the top-grossing mobile game globally for five consecutive years. In the period from January to August 2024, the game generated nearly \$1.7 billion in revenue, second only to MONOPOLY GO!.

China remains the primary revenue source for Honor of Kings, with over 99% of its revenue in 2024 coming from the Chinese iOS market.

Note: Data as of August 2024. Source: Sensor Tower Store Intelligence

Sensor Tower's revenue figures are derived from estimated in-app purchase (IAP) revenue on the App Store and Google Play, excluding ad revenue, revenue from third-party Android app-store sales, and direct payment revenue from developers' websites and other channels. Unless explicitly stated as net revenue, the revenue figures shown represent gross revenue (before platform deduction).

Honor of Kings' Global Cumulative IAP Revenue

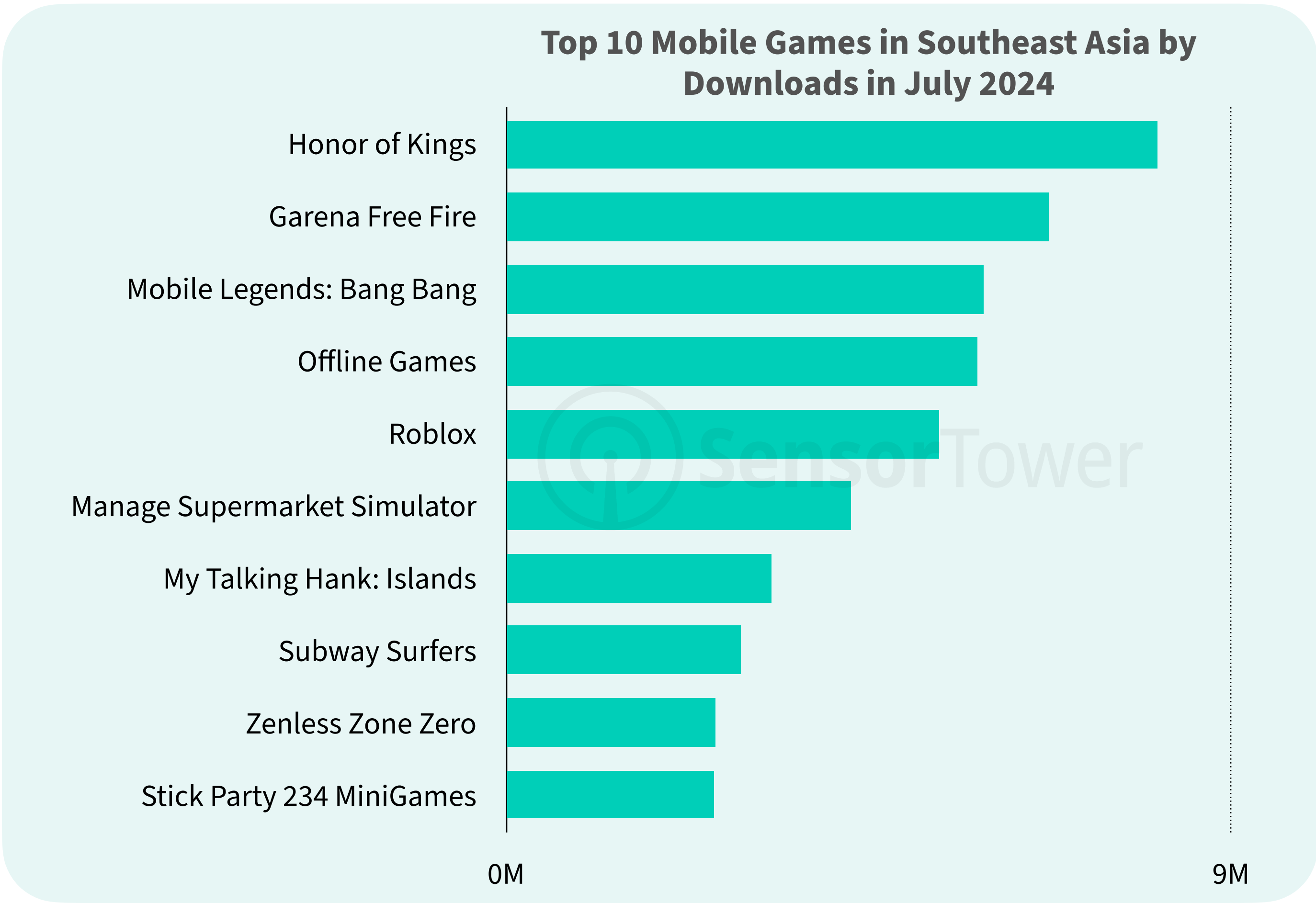
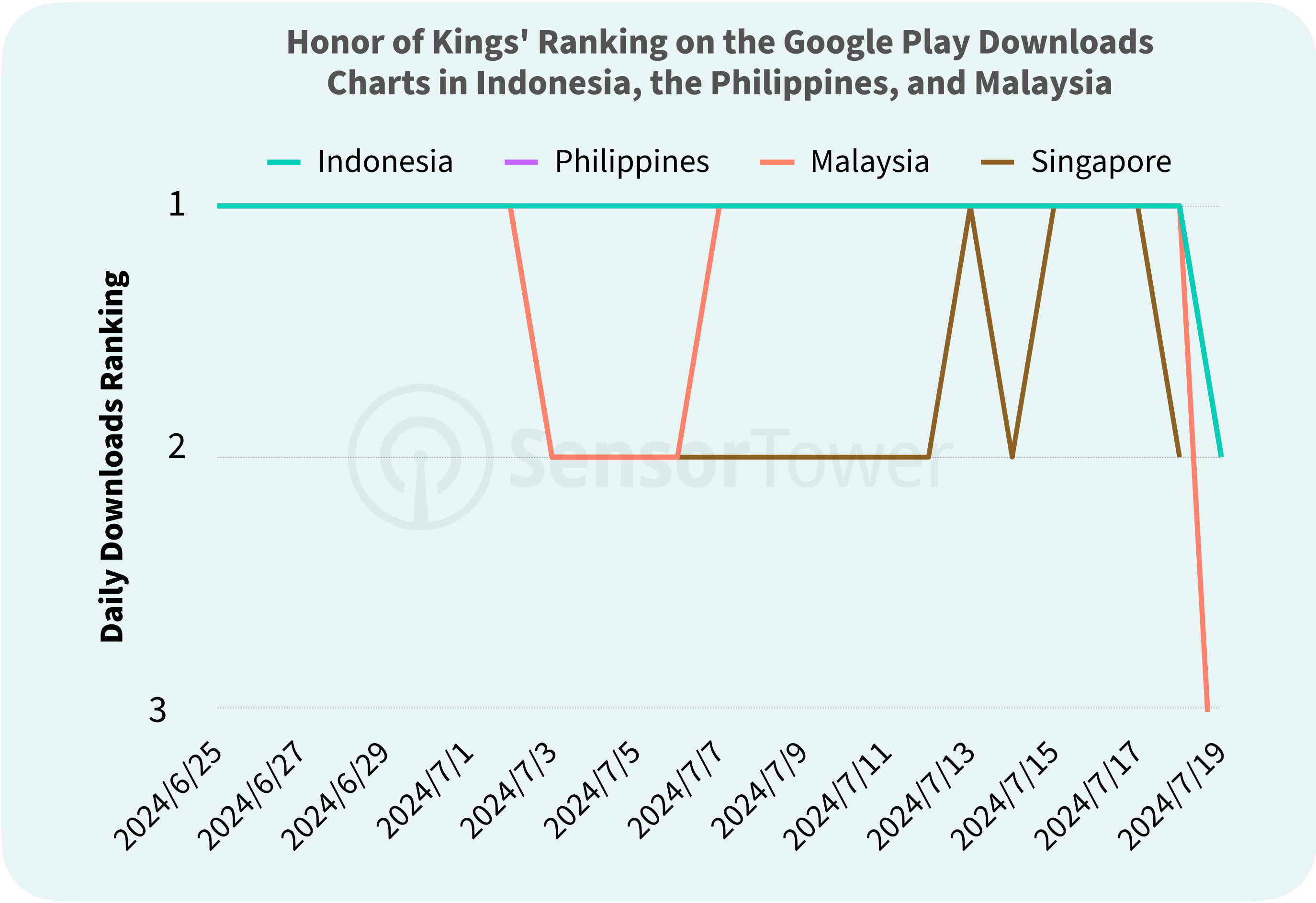


Honor of Kings consistently ranks as the top mobile game on the Google Play downloads chart in markets such as Indonesia and topped the Southeast Asia mobile game downloads chart in July 2024

Note: Data as of July 2024. Source: Sensor Tower Store Intelligence
Sensor Tower's download data is derived from estimated downloads on the App Store and Google Play, excluding pre-installs, duplicate downloads, and downloads from third-party Android app-store. Google Play is not available in Mainland China.

Following its official global launch in mid to late June 2024, Honor of Kings rapidly rose to the top of the Google Play downloads charts in markets like Indonesia, the Philippines, Malaysia, and Singapore, maintaining its position there for several consecutive weeks.

In July 2024, Honor of Kings experienced a 175% month-over-month increase in downloads in the Southeast Asian market, surpassing the perennial favourite Garena Free Fire to claim the top position on the Southeast Asia mobile game download chart for the first time.

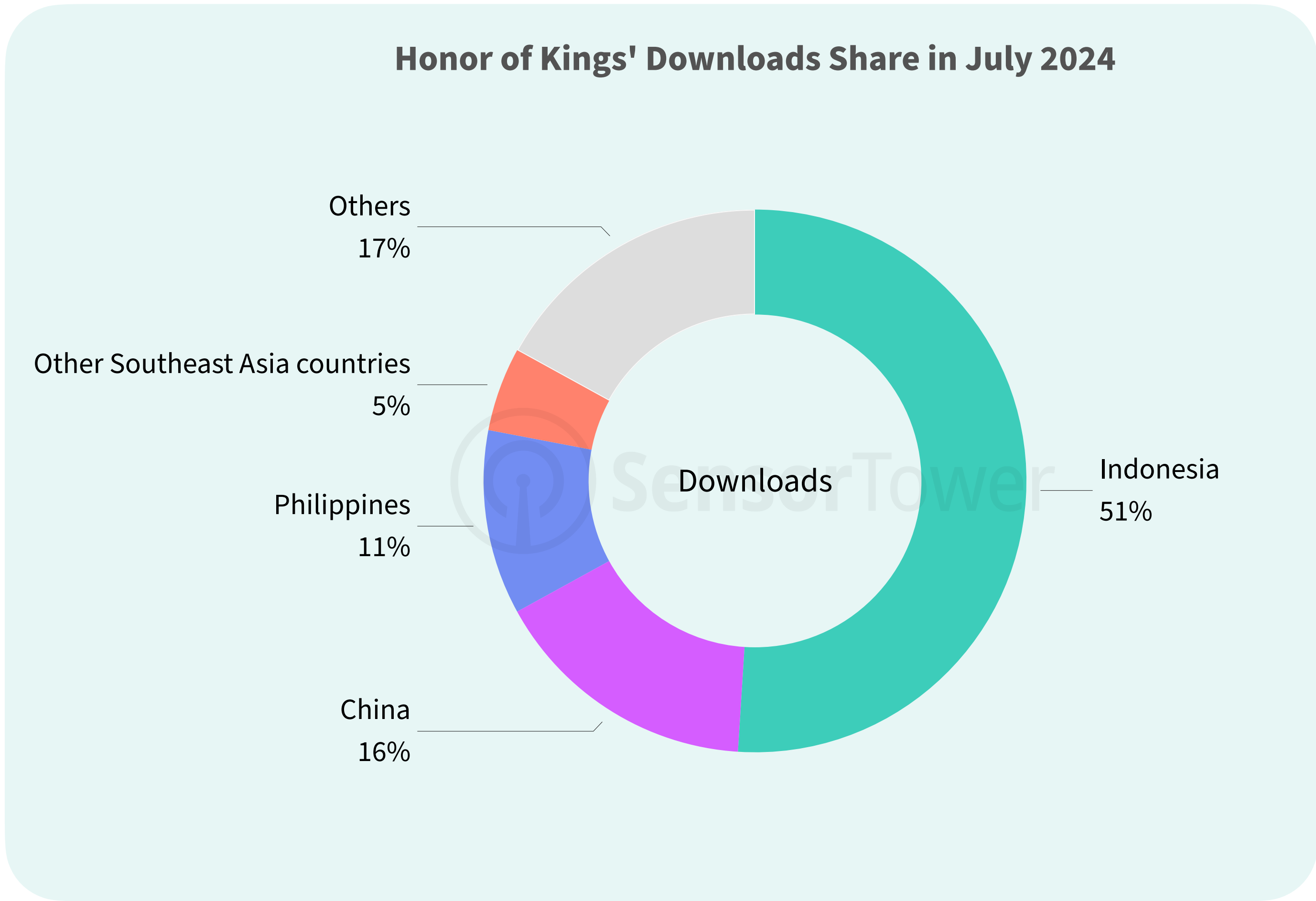
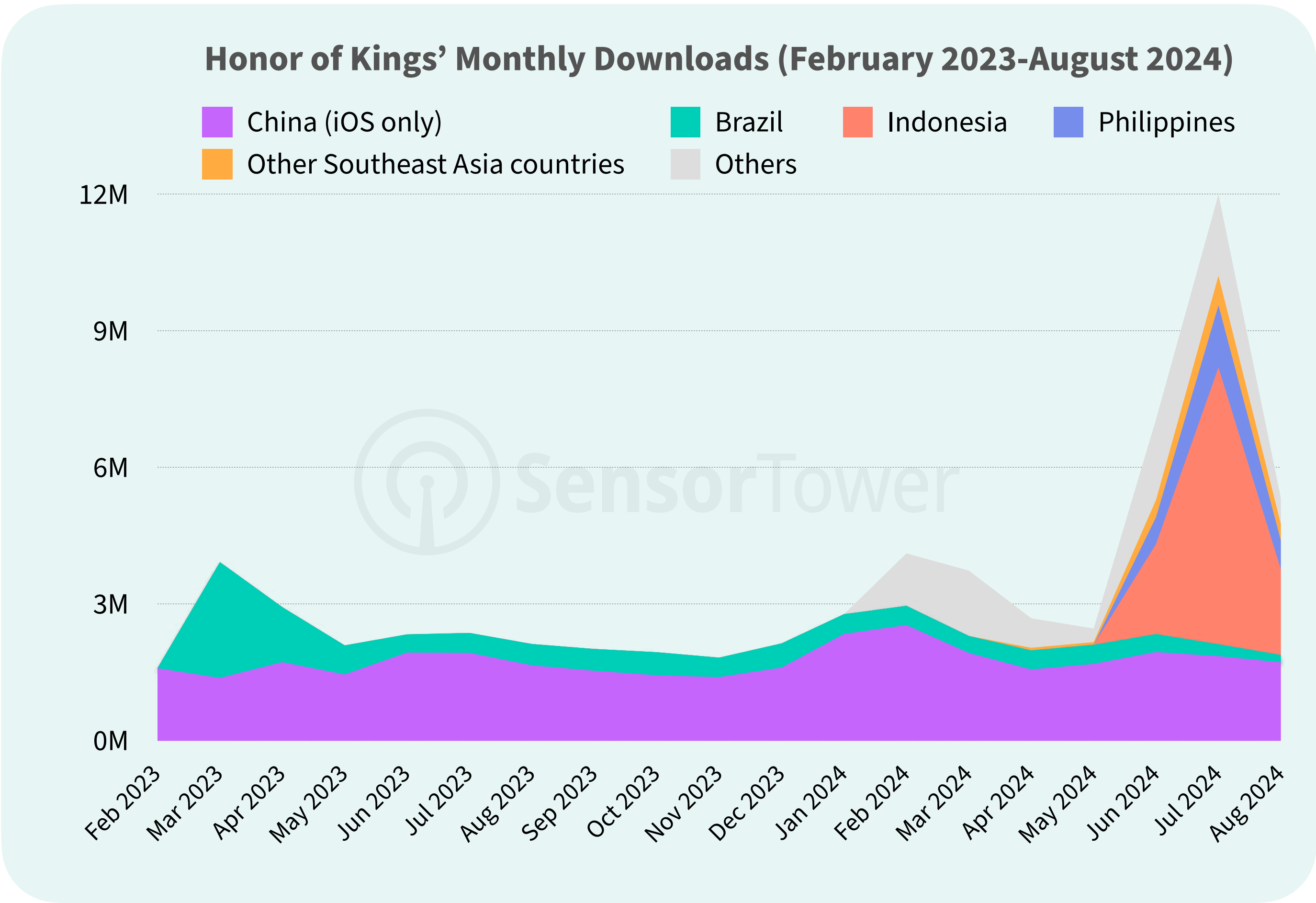


In July 2024, Indonesia contributed to 51% of Honor of Kings' global downloads

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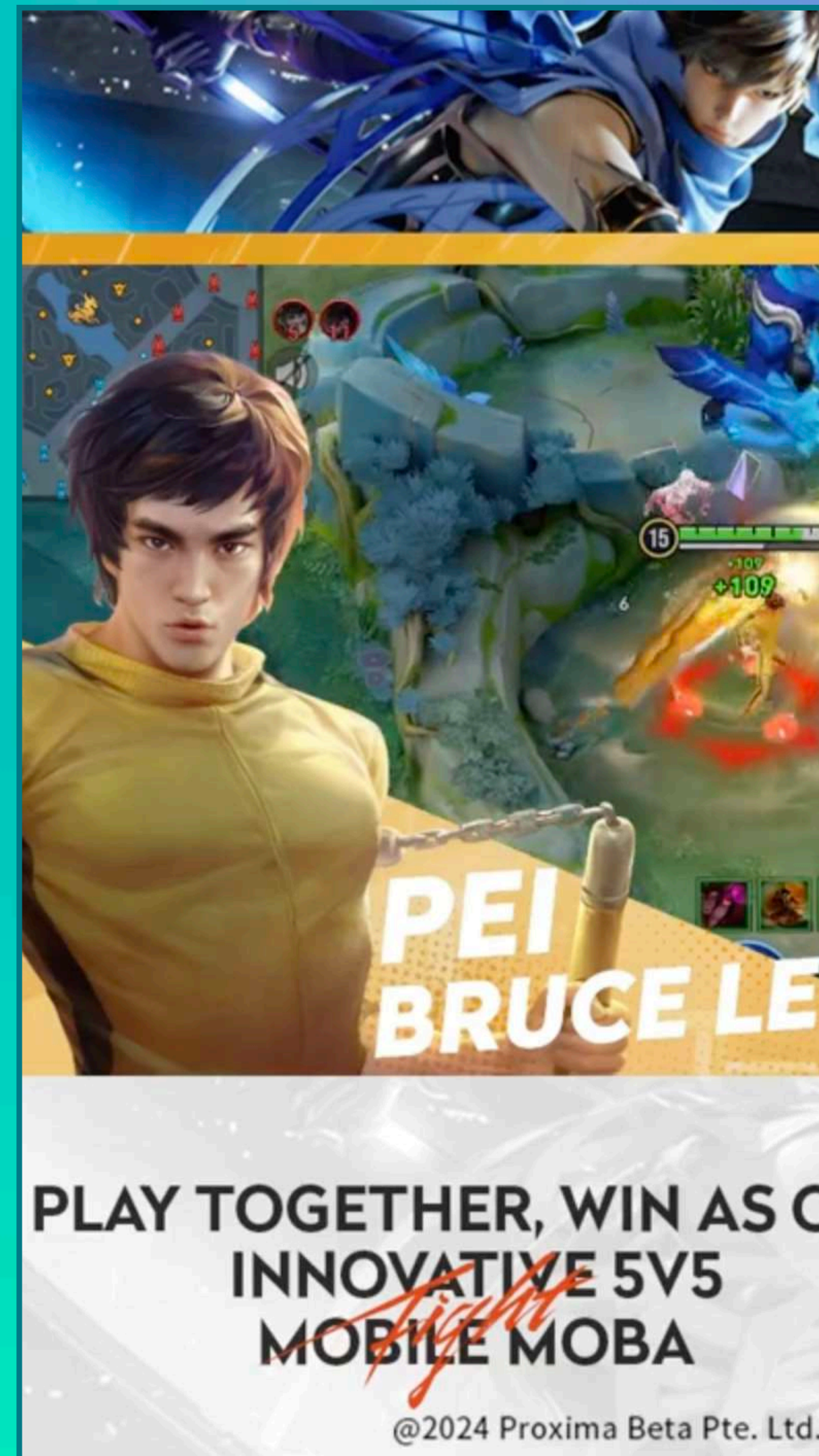
In July 2024, Honor of Kings saw a spike in monthly downloads in Indonesia, with global total downloads rising to nearly five times that of May, reaching a new peak since its launch.

In July 2024, the Indonesian market accounted for 51% of Honor of Kings' global total downloads, 3.2 times that of the Chinese iOS market. The entire Southeast Asian market contributed 67% of its total downloads.



Honor of Kings's creatives focus on localisation and highlighting game characters

Source: Sensor Tower Ad Intelligence



Key Takeaways



In the first half of 2024, mobile game downloads in the Southeast Asian market grew by 3.4% compared to the previous half-year to 4.2 billion.

In the first half of 2024, the IAP revenue of mobile games in the Southeast Asian market decreased slightly by 3.0% compared to the previous half-year to \$1.16 billion, which is close to the level seen in the first half of 2020.



Indonesia has the highest mobile game downloads in Southeast Asia.

From January to August 2024, the mobile game downloads in Indonesia increased by 10% period-over-period to nearly 2.3 billion, accounting for over 41% of the total mobile game downloads in Southeast Asia. Thailand's mobile game revenue grew by 10% period-over-period to \$400 million.



Garena Free Fire continues to dominate mobile game downloads and downloads growth in Southeast Asia.

Moonton's MOBA mobile game, Mobile Legends: Bang Bang, experienced a 6% period-over-period increase in revenue in the Southeast Asian market, maintaining its status as the top-grossing mobile game. Meanwhile, Konami's sports mobile game, eFootball™ 2024, saw a nearly 90% surge in revenue period-over-period in the Southeast Asian market, solidifying its position on the revenue growth chart.



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Singapore



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Sensor Tower About Us

Sensor Tower is a leading and reliable enterprise mobile market insight consulting service platform, aiming to provide enterprises, publishers and developers around the world with comprehensive data performance, user usage and advertising trends in the global mobile market.

Global Data Coverage

Our platform provides the most comprehensive data on **downloads** and **in-app revenue** in the mobile market, with the App Store's global data coverage reaching **99%**

Accurate Data Index

Multiple industry validation of product benchmarking milestone event data error of **<5%**

Store Data Acquisition

Data from the App Store and Google Play Store obtained via the **API** is updated on a daily basis

Product Function Innovation

Our platform continues to **update product** features to better serve partners and customers



Sensor Tower

Solutions



Store Intelligence

Downloads & Revenue
Publishers Breakdown
Country Breakdown
Industry Breakdown
...



App Intelligence

App Overview
Store Recommendations
Keywords Research
Ad Searches
...



Ad Intelligence

Top Advertisers
Creative Gallery
Network Analysis
...



Usage Intelligence

DAU/MAU
User Retention
User Demographics
App Overlap
...



App Teardown

Top SDKs
SDK Detection
...



Consumer Intelligence

Engagement
Cohort Overlap
...



SensorTower

About Us

Sensor Tower is the leading solution for mobile marketers, app developers, and industry analysts who demand competitive insights on the mobile economy. Sensor Tower’s product suite includes: App Intelligence, Store Intelligence, Ad Intelligence, and Usage Intelligence.

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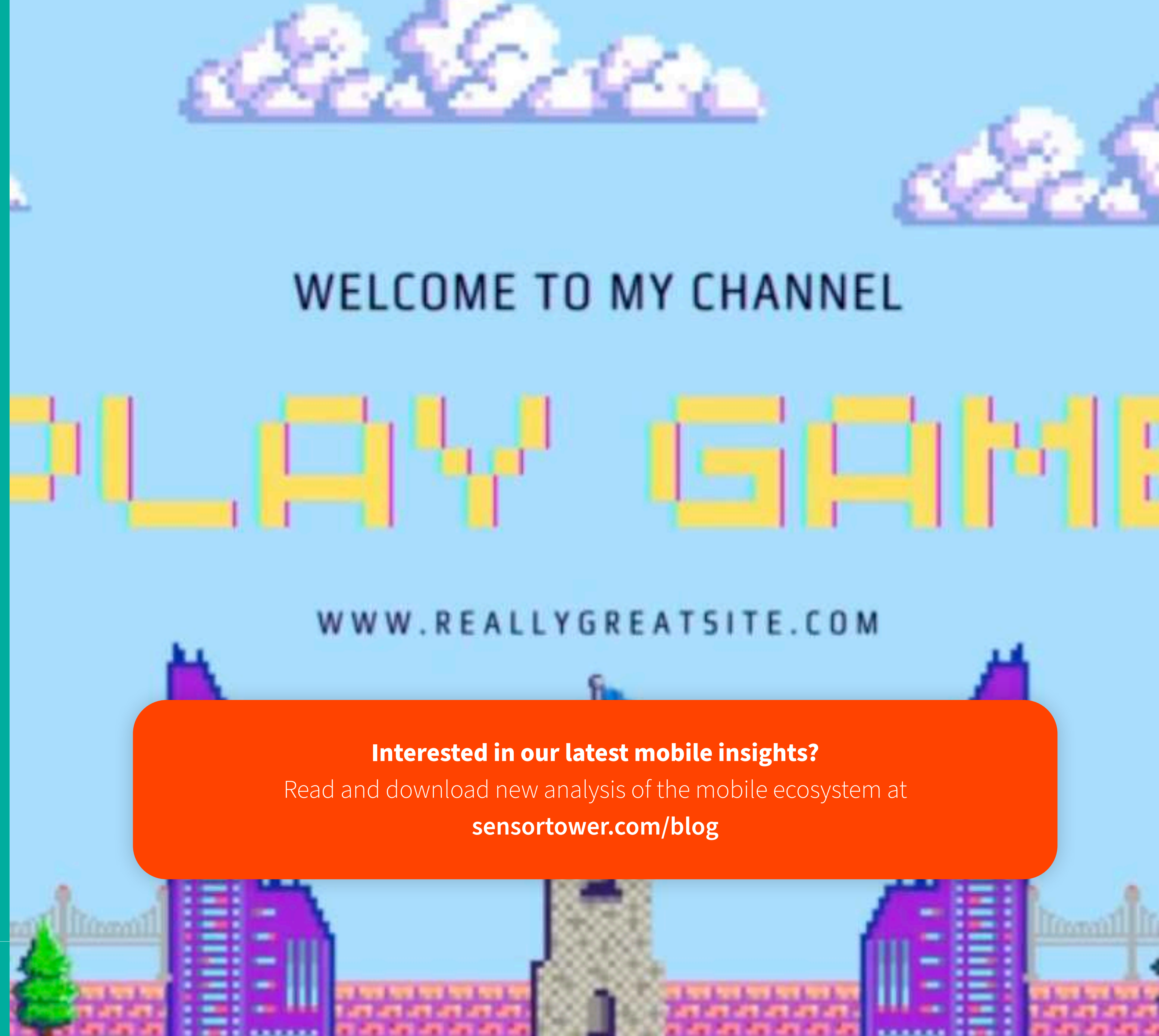
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