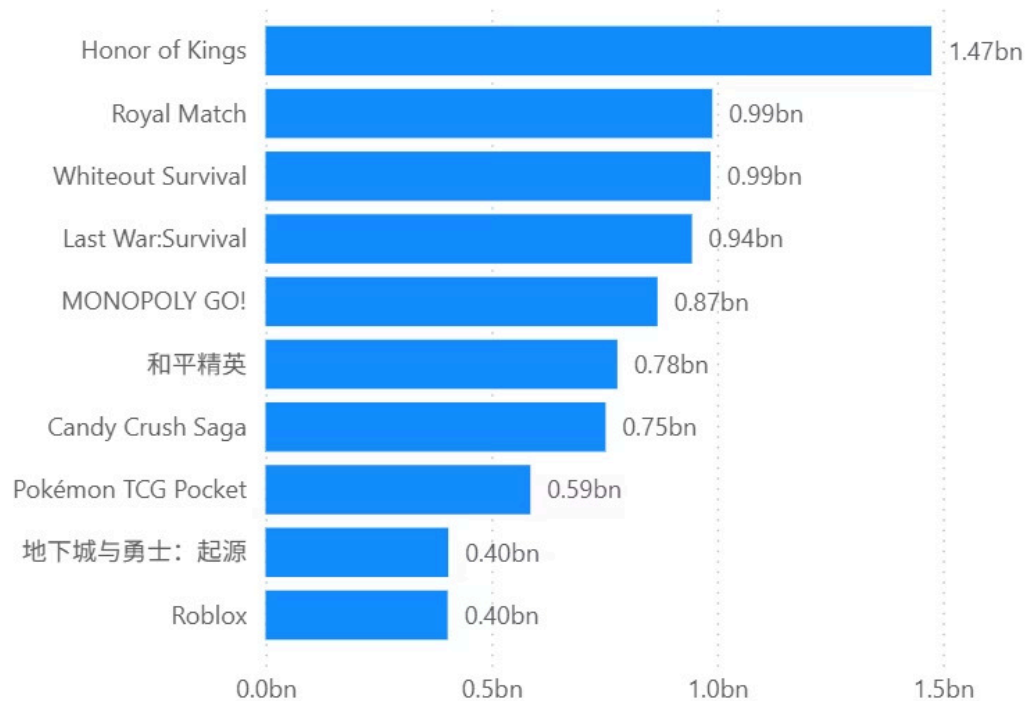


# **App Store Revenue Analytics & Insights Recommendation to Business Development Team**

Comprehensive insights through powerful visual storytelling and data-driven decision making for business stakeholders.

# Top Games & Revenue

Top 10 Games by Revenue



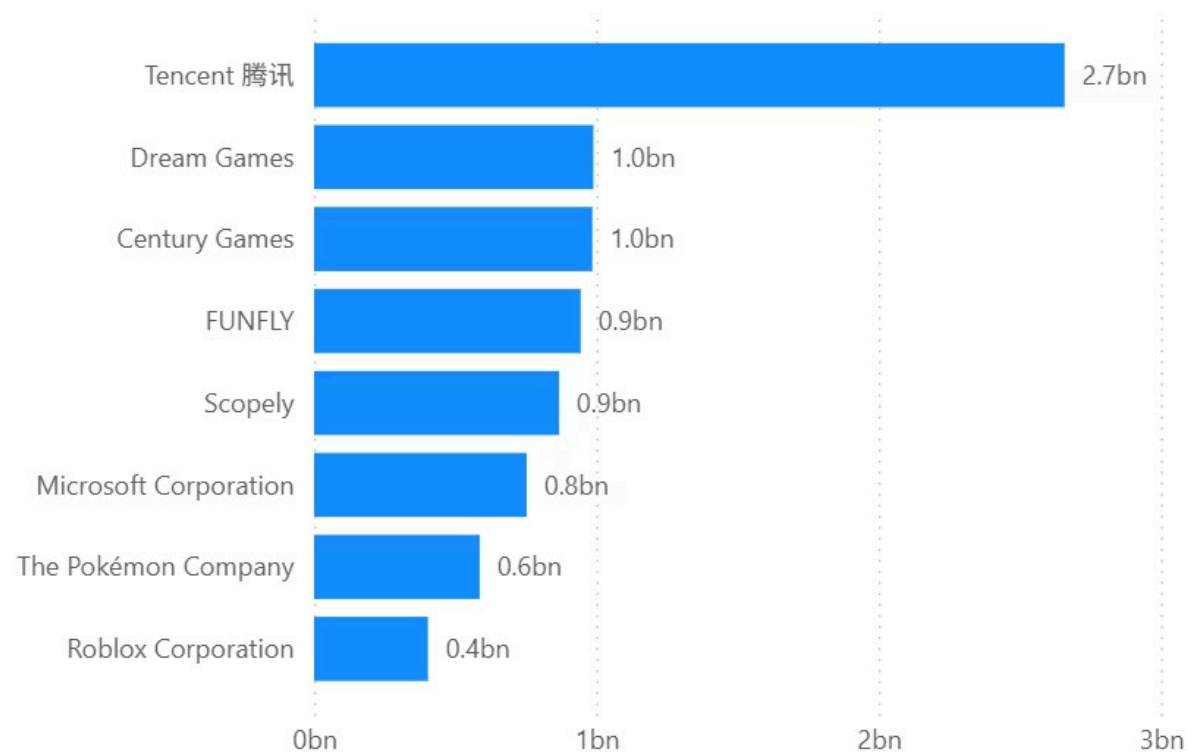
**Honor of Kings** dominates with **\$1.47bn**, significantly higher than all others (almost 50% higher than the next)

**Royal Match** and **Whiteout Survival** are tied at **\$0.99bn**, showing strong global reach for both a puzzle game and a survival game.

The chart shows a **steep drop-off** after the top 5 games. The top 3–4 titles capture a disproportionate share of revenues

# Top Publishers & Revenue

Top 10 Publishers by Revenue



## Strategic Insights

**Tencent** is the clear market leader with **\$2.7bn**, more than **2.5x larger than the next publisher**.

**Dream Games** and **Century Games** tie for second at **\$1.0bn** each, showing strong performance in puzzle and mid-core strategy genres.

There is a **steep gap between Tencent and all others**: Tencent alone makes almost as much as the rest of the top 9 combined.

# Top Sub-genre & Revenue

01

**4X Strategy** is the top sub-genre, generating **\$4.32bn (32.7%)**, making it the largest contributor by a wide margin.

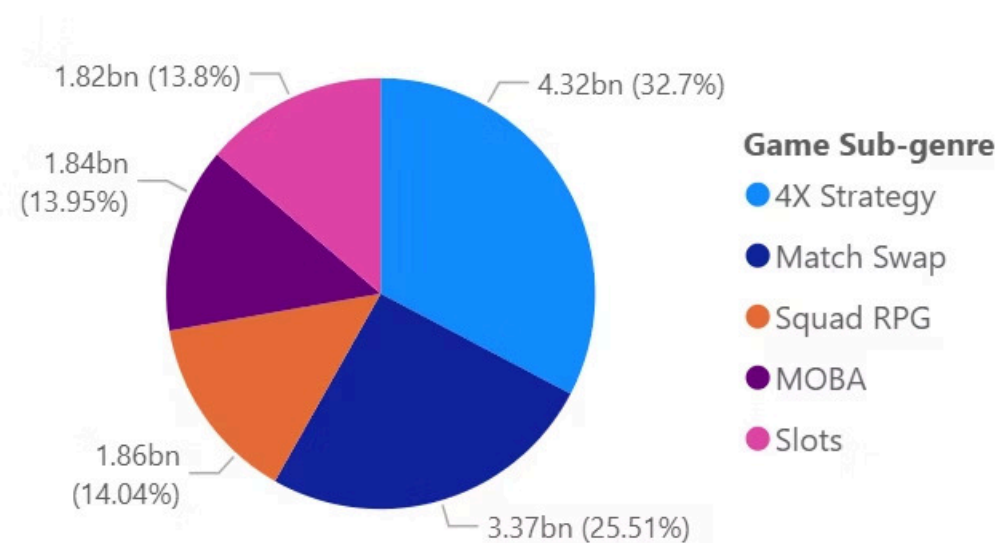
02

**Match Swap (puzzle/match-3 style)** is the second largest, with **\$3.37bn (25.5%)**, showing strong monetization from casual audiences.

03

The market is relatively **diverse**: although 4X Strategy leads, **four other genres each account for ~14%**, showing no single genre completely dominates.

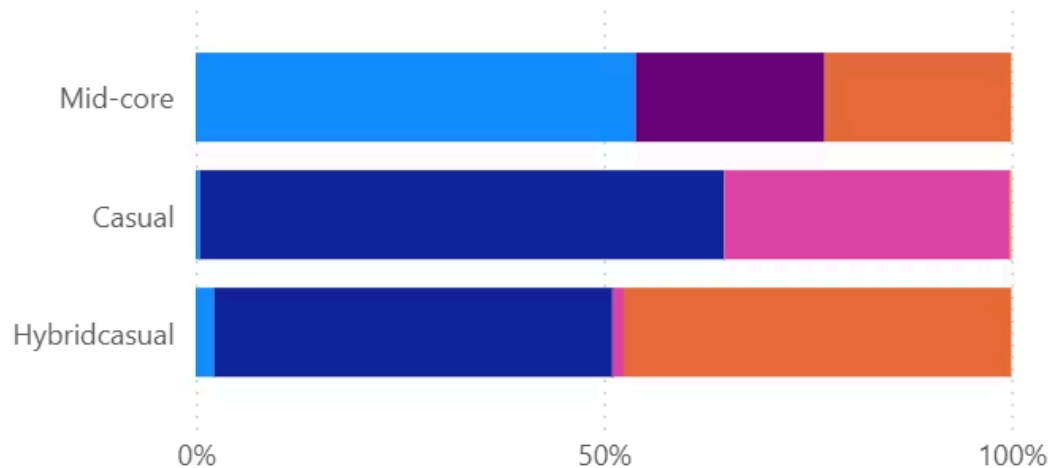
Revenue by Sub-genre



# Product model & Revenue in relation with Top Sub-genre

Revenue by Product Model (stacked by Top 5 Sub-genre)

Game Sub-genre ● 4X Strategy ● Match Swap ● MOBA ● Slots ● Squad RPG



**Mid-core games:** Revenue is heavily weighted towards **4X Strategy**, with additional contributions from **MOBA** and **Squad RPG**. This shows that mid-core is dominated by competitive and strategy-driven genres.

**Casual games:** Almost entirely dominated by **Match Swap (puzzle)** and **Slots**, reflecting the classic casual monetization formula — easy accessibility, broad user base, and high long-term monetization.

**Hybridcasual:** A more balanced mix, but primarily driven by **Squad RPG** with smaller shares from **Match Swap** and **4X Strategy**. This suggests hybridcasual is evolving into a **bridge between puzzle mechanics and mid-core depth**.

5.26bn

Top5 Revenue

36.61bn

Total Revenue

5bn

Total Downloads

## Performance Overview

“

The **Top 5 games** only account for **~14.4% of total revenue** (\$5.26bn / \$36.61bn), showing that while top titles dominate attention, the long tail of games contributes significantly to overall revenue.

”

“

With **5bn downloads** against **\$36.61bn revenue**, the industry generated about **\$7.3 revenue per download on average**.

”

# Publisher Country & Revenue & Downloads

1

The pie charts show that **Asia has the largest relative share**, indicating it is both a **high-download** and **high-revenue region**

2

**North America** contributes a strong share of revenue despite a smaller population than Asia → reflects **higher ARPU/monetization efficiency**

3

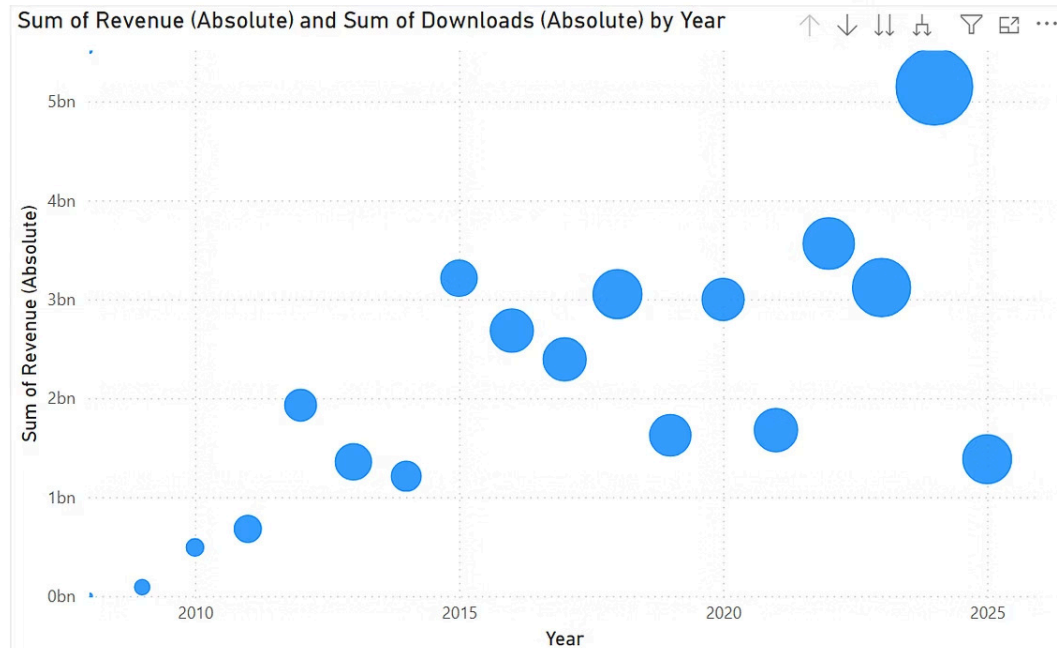
**Europe** also contributes significantly but appears more fragmented across multiple publishers.

Sum of Downloads (Absolute) by Publisher Country and Revenue (Absolute)

Revenue (Absolute) ● 38689.96 ● 38699.08 ● 38701.75 ● 38759.67 ● 38775.42 ● 38801.26 ● 38808.27 ● 38808.8 ● 38822.88 ▶



# Revenue & Downloads by Year



- **2008–2012:** Industry revenue was relatively small but showed rapid early growth.
- **2013–2015:** Strong jump, reaching ~\$3bn annual revenue. This reflects the boom of smartphones and the rise of early hits (e.g., *Clash of Clans*, *Candy Crush*).
- **2016–2019:** Revenue stabilized around \$2–3bn annually with fluctuations. The bubble sizes (downloads) suggest steady growth in player base, though not always matching revenue growth.
- **2020–2022:** COVID-era gaming surge is visible — larger bubbles and higher revenue peaks (~\$3–3.5bn). Engagement and downloads expanded significantly.
- **2023–2025:** Recent years show **revenue hitting its highest point in 2025 (~\$5bn)** with the biggest bubble → highest combined downloads + revenue in history. However, some years before 2025 saw large download bubbles but relatively weaker revenue, suggesting **downloads grew faster than monetization efficiency**.



# Recommendations for Business Development

Strategic focus areas for the Business Development team to target high-value partners and expand market reach.

	<b>High-Value Partners &amp; Genres</b>  Prioritize Chinese mid-core developers (4X, RPG, MOBA) for their proven monetization.  Build bridges with casual game leaders (puzzle, slots) and watch hybridcasual innovators for breakout hits.		<b>Geographic Focus</b>  Essential Asia partnerships for localization and distribution.  Leverage North American partners for high ARPU.  Scout European smaller studios for co-development due to market fragmentation.		<b>Portfolio Balance Strategy</b>  Anchor with mid-core strategy/RPG for high spenders.  Drive installs with mass-market casual games.  Experiment in hybridcasual as a growth frontier with less incumbent dominance.
	<b>IP-driven Growth</b>  Seek licensing deals and co-development with IP holders in anime, sports, or entertainment, capitalizing on strong monetization shown by IP-based games.			<b>Long-Term Bets</b>  Explore early partnerships in emerging markets like LATAM and Africa.  Invest in cross-genre innovation, such as puzzle + RPG or survival + casual hybrids, to discover new hit formulas.	

# Thank You



We appreciate your time and attention today.

Let's connect to discuss these insights further and explore opportunities for growth.