

MENA best mobile games regionally unique or hyper localized games are succeeding

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Summary

The mobile games industry in the Middle East and North Africa (MENA) region is experiencing unprecedented growth, driven by increased smartphone penetration, a youthful and tech-savvy population, and significant investments from both public and private sectors. The region, which includes affluent markets such as Saudi Arabia and the United Arab Emirates as well as rapidly developing countries like Egypt and Iraq, offers a unique landscape for mobile game developers.[1][2] The MENA region is now recognized as the fastest-growing gaming market globally, with consumer spending on games reaching \$7.1 billion in 2023, marking a 4.7% increase from the previous year.[3] A key factor in the success of mobile games in the MENA region is the emphasis on regional uniqueness and hyper-localization. Developers who tailor their games to reflect local cultures, languages, and preferences have seen higher engagement and monetization rates. For instance, games that incorporate Arabic language support and culturally relevant themes resonate deeply with the local audience, as evidenced by the popularity of titles like Tencent's Arabic version of PUBG Mobile.[4] Localization efforts extend beyond mere translation, encompassing cultural adaptation to include local festivals, landmarks, and social norms, thereby ensuring that games are both culturally and regionally appropriate.[5]

The historical development of the gaming industry in the MENA region has evolved significantly. Initially, the region lagged behind North America and Europe in large-scale game development. However, recent years have seen rapid growth and significant investment, transforming MENA into a burgeoning hub for game development and innovation.[6] The market's expansion is characterized by the popularity of genres such as strategy, action, and simulation games, which collectively account for a substantial portion of total mobile game revenues.[7] Moreover, the COVID-19 pandemic accelerated the adoption of online gaming services, further boosting the industry's growth trajectory.[8] Despite these promising trends, the MENA mobile gaming market faces several challenges, including monetization barriers and the need for more local game development expertise. Payment system diversity and a reliance on cash transactions complicate the monetization landscape for developers. However, this also presents an opportunity for local developers to create culturally relevant games that cater specifically to the regional audience, thereby filling a significant market gap.[9][10] International companies such as Ubisoft and MENA Mobile are increasingly investing in the region, contributing to local economic growth and knowledge transfer, which bodes well for the future of the MENA mobile gaming industry.[11]

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Overview

The mobile games industry in the Middle East and North Africa (MENA) region is experiencing significant growth, driven by several key factors. The region can be

broadly divided into affluent and rapidly growing markets such as Saudi Arabia and the United Arab Emirates, and countries with a large user base in the early stages of monetization like Egypt and Iraq[1]. These distinctions are crucial for developers aiming to penetrate the market effectively.

Success in the MENA mobile games market requires careful consideration of various aspects. One of the critical steps in the development process is hitting various milestones that ensure the game is on track for a successful launch[2]. Furthermore, adopting the best game marketing strategies is vital for redirecting substantial amounts of genuine traffic towards the application, thereby reflecting its true success[3].

For developers, it is essential to stay updated with the latest mobile games industry news, analysis, and opinions to better understand market trends and consumer preferences[4]. By focusing on these factors, developers can create regionally unique or hyper-localized games that resonate with the MENA audience, thereby achieving higher engagement and monetization.

Historical Development

The Middle East and North Africa (MENA) region has historically been slower to adopt large-scale game development compared to other regions like North America and Europe. Traditionally, game makers and publishers in the MENA region have focused on local player bases and often acted as partners for international companies entering the market[5]. However, this trend began to shift significantly in recent years, with 2023 marking a landmark year for the region's gaming industry.

The MENA region has seen rapid growth and significant investment, setting a promising stage for aspiring developers and investors. According to Newzoo, MENA consumer spending on games increased by 4.7% in 2023, reaching \$7.1 billion, making it the fastest-growing games market worldwide[5].

Mobile gaming, in particular, has experienced remarkable growth, driven by in

creased smartphone penetration and a tech-savvy population. The MENA-3 region—comprising Saudi Arabia, Egypt, and the United Arab Emirates—has been at the forefront of this expansion. The mobile gaming market in this sub-region is expected to grow at a compound annual growth rate (CAGR) of 15.7% from 2021 to 2026, reaching \$3.9 billion in revenue by 2026[6]. This market growth is characterized by the popularity of genres like strategy, action, and simulation, which account for 63% of total mobile game revenues[6].

Localization has played a crucial role in unlocking the region's potential. Companies have been customizing games by adapting language and cultural elements to better resonate with local players. For example, MBC Group's WIZZO developed a game called Invasion, starring Lebanese pop-star Haifa Wehbe in animated form[7]. International firms such as Ubisoft from France and China's MENA Mobile have also tapped into local resources, thereby contributing to the local economy and further accelerating industry growth[7].

Moreover, the COVID-19 pandemic accelerated the use of online gaming services, contributing to the market's rapid expansion. The MENA gaming market is expected to grow at an average annual rate of 13.88% during the forecast period of 2022-2027[8]. This pandemic-induced surge provided a significant boost to mobile gaming revenues, as seen globally[9].

The region's dynamic youth population, escalating disposable incomes, and cutting-edge technology have not only facilitated the growth of mobile gaming but have also positioned MENA as a hub of innovation in the global gaming arena[10]. The growth trends and expanding market size suggest a promising future, making the MENA region a lucrative destination for game developers and investors alike[10][11].

Cultural and Regional Influence

The gaming industry in the MENA-3 region is uniquely positioned for growth due

to its rich cultural heritage and diverse population. This distinctiveness offers both opportunities and challenges for game developers aiming to penetrate this market.

Opportunities for Local Game Developers

The MENA-3 region has a vibrant culture that remains underrepresented in the global gaming industry. This gap presents a significant opportunity for local game developers to create games that are culturally relevant and tailored to local tastes[6].

The report highlights that developers can innovate by integrating elements of the region's heritage and traditions into their games. This not only fills the market gap but also helps in celebrating the region's rich cultural narrative.

Popular Game Genres

Several genres have gained immense popularity in the MENA region. Action and adventure games like PUBG Mobile and Call of Duty: Mobile are particularly popular among younger gamers[12]. The FIFA/FC series and Pro Evolution Soccer also have a significant following, reflecting the region's passion for football[12]. In addition to these globally popular genres, there is a growing interest in games that resonate with local folklore, history, and cultural themes, such as those incorporating elements of Islamic history or Arabian Nights[12].

Importance of Localization

Localization in the MENA region goes beyond mere translation; it involves cultural adaptation to make the content appropriate for local audiences[13]. Successful localization efforts that incorporate local festivals, landmarks, and cultural references have shown higher engagement levels[12]. Conversely, understanding cultural taboos and religious sensitivities is crucial for avoiding negative reactions and ensuring the game's success in the region[12].

Economic and Demographic Factors

Rapid economic growth and increasing disposable incomes in the MENA region have

led to a larger middle class with a growing appetite for mobile gaming[14]. The high smartphone penetration and the young demographic further fuel this growth, making the region a hotspot for mobile gaming innovation and investment[6].

Examples of Successful Localization

A notable example of successful localization is Tencent's deployment of an Arabic version of PUBG Mobile. Since its release, the game has become one of the most downloaded and top-grossing titles in the region, underscoring the importance and effectiveness of culturally relevant content[15].

Future Trends

The region is witnessing a surge in tech startups and increasing investments in esports infrastructure, enhancing opportunities for immersive gaming experiences.

Developers are increasingly emphasizing localization and culturalization, incorporating Arabic language support and culturally relevant themes to enhance user engagement[10]. This trend is accompanied by the adoption of non-disruptive advertising formats and the evolution of mobile games into social platforms that foster community interaction[10].

Localization Strategies

Localization plays an essential role in the success of mobile game developers who strive to conquer international markets. It involves much more than merely translating words; developers must also consider cultural nuances, player preferences, and regional differences to create immersive experiences that resonate with diverse audiences[16].

Understanding the MENA Region

The MENA region presents a unique set of challenges and opportunities for game developers. While countries in MENA all share the same language and mostly follow the same religion, their complex mix of cultures means they vary significantly[1]. This variation necessitates a thorough understanding of the region's cultural diversity to

ensure that games are well-received across different MENA countries.

Language and Cultural Adaptation

For successful localization, it is important to go beyond using official Arabic for navigation. While official Arabic works well for app or game navigation, incorporating Arabic slang in the UI and promotional material helps make the product feel more relevant to users in the region[1]. Moreover, understanding what to avoid is as important as knowing what to include. Religious and cultural sensitivities can make or break a game in MENA, so developers need to be aware of cultural taboos[12].

Incorporating Local Elements

Games that incorporate local festivals, landmarks, and cultural references tend to see higher engagement[12]. By including these elements, developers can create a more immersive and culturally resonant experience for players. For example, successful localization efforts have included local festivals and landmarks that are familiar and meaningful to the MENA audience.

Demographic Considerations

Young people and teenagers form the core of the gaming demographic in the MENA region. This group is particularly drawn to competitive and interactive games, such as PUBG Mobile and Fortnite, which are immensely popular due to their engaging multiplayer modes and high-quality graphics[10]. Understanding the preferences of this demographic is crucial for tailoring games to meet their expectations.

Industry Support and Growth

The MENA market is attracting more international game publishers and developers, partly due to the young population under the age of 25, who make up half of the region's population[17]. Countries like Saudi Arabia and the UAE have launched policies to encourage the local gaming industry, hosting new studios and offices for global gaming companies, as well as organizing industry-related events[17]. This

expanding infrastructure and investment in eSports and competitive gaming further create opportunities for developers.

Tailored Services for Localization

Companies like Laoret emphasize the importance of applying native translation and localization experts who reside in the target region. This approach combines linguistic and technical authority to secure a multilingual gaming experience that is both culturally and technologically sound[18]. Tailored services ensure that games are not only translated but also culturally adapted to meet the unique needs of the MENA market.

Economic Factors

The MENA region's mobile gaming market has seen substantial growth in recent years, driven by various economic factors. Rapid economic growth across the region has led to increased disposable incomes and a burgeoning middle class, both of which contribute to greater purchasing power and a willingness to spend on leisure activities, including mobile games[14]. Countries like Saudi Arabia and the United Arab Emirates represent affluent and fast-growing markets, whereas nations such as Egypt and Iraq have large user bases that are still at an early stage of monetization[1].

Consumer spending on games in the MENA region saw a 4.7% increase in 2023, reaching \$7.1 billion, making it the fastest-growing games market globally[5]. This growth is particularly significant given that other regions such as Europe, North America, and Asia-Pacific experienced declines in the same period[5]. The Saudi government is investing heavily in the sector, with \$38 billion allocated through the Savvy Games Group to establish Saudi Arabia as a major gaming hub[5].

Furthermore, smartphone penetration rates in countries like the UAE and Saudi Arabia exceed 90%, facilitating the widespread adoption of mobile gaming[10]. The mobile gaming market in the MENA-3 region is expected to grow at a compound

annual growth rate (CAGR) of 15.7% from 2021 to 2026, reaching \$3.9 billion in revenue by 2026[6]. This growth is driven by high disposable incomes, a dynamic youth population, and significant public and private investments in the gaming industry[19].

Monetization remains a challenge, with diverse payment systems and a reliance on cash transactions posing barriers for developers. While global platforms like Google Play and Apple App Store offer in-app purchases, many players prefer alternative payment methods such as carrier billing or e-wallets due to limited access to credit cards[10].

The MENA region's mobile gaming market not only attracts international game publishers and developers but also stimulates local economic development by employing local talent and fostering knowledge transfer[7]. Companies such as Ubisoft and MENA Mobile are contributing to the local economy and helping to grow the gaming industry by tapping into local resources[7].

Key Players in the Region

Several companies and organizations are playing pivotal roles in the success of mobile games in the MENA region. These key players range from local firms to international giants who are capitalizing on the unique market dynamics and opportunities present in the region.

Game Power 7

Game Power 7 is a notable name in the MENA gaming industry. Based in Dubai, the company not only develops its own games but also collaborates with third parties to offer localization and distribution services. This dual approach has been especially beneficial for Western companies aiming to establish a presence in the lucrative MENA market. The company's expertise in both game development and publishing makes it a significant player in the region's gaming landscape[20].

Bayantech

Bayantech is another crucial player, specializing in game localization for the MENA region. The company provides comprehensive solutions that include linguistic talent, localization engineering, and voice-over artistry, ensuring that games are culturally and linguistically tailored to the MENA audience. Partnering with a localization specialist like Bayantech can significantly ease the complexities of project management for game developers looking to break into the MENA market[11].

Niko Partners and AppMagic

Niko Partners, in collaboration with AppMagic, has contributed significantly to the understanding of mobile game trends in the MENA region. Their reports provide in-depth analyses of popular mobile game genres such as RPGs, Strategy, MOBA, Puzzle, and Battle Royale, across various metrics like Monetization, Engagement, Esports, and Appeal. These insights are invaluable for companies looking to tailor their strategies for the MENA market[21].

Tamatem

Tamatem is a prominent company specializing in publishing mobile games tailored to the MENA region. They focus on cultural localization, which involves more than just translation. By incorporating local festivals, landmarks, and cultural references, Tamatem ensures higher engagement from the regional audience. Collaboration with local outfits like Tamatem is often essential for achieving true cultural localization[13].

International Collaborations

International companies like Ubisoft from France and MENA Mobile from China are also making strides in the MENA region. These companies are tapping into local resources and contributing to the local economy, thereby fostering growth and attracting further investment. This involvement is not just about market entry but also about knowledge transfer and providing valuable experience to local talent[7].

Savvy Games Group

Savvy Games Group is another influential entity in the MENA gaming sector. Under the leadership of CEO Brian Ward, the group has achieved significant milestones and has ambitious plans for the future. Their efforts are contributing to making the MENA region a hub of innovation and growth in the global mobile gaming arena[4].

These key players, through their various specializations and collaborative efforts, are collectively propelling the MENA mobile gaming industry forward, making it one of the fastest-growing and most dynamic markets in the world.

Popular Genres and Games

The mobile gaming landscape in the MENA region is diverse, with several genres capturing significant player engagement and revenue. Among these, RPGs stand out as the largest genre by revenue, with total spend in 2022 exceeding the combined spend of the next four genres [22]. Strategy games also hold a strong position, especially in terms of player satisfaction and willingness to explore new titles within the genre [22].

Strategy Games

Strategy games have a considerable following in the MENA region, particularly titles like Clash of Clans and Rise of Kingdoms [12]. These games are frequently localized to Arabic, which significantly contributes to their success [1]. Strategy game players in the region show a high level of satisfaction and are notably open to trying new games in the same genre [22]. Additionally, this genre sees significant investment from global developers, making it a lucrative market for new entries [1].

Action and Adventure Games

Action and adventure games such as PUBG Mobile and Call of Duty: Mobile are immensely popular, especially among younger gamers [12]. These games have shown strong growth since 2018 and continue to evolve, maintaining their appeal [1].

The successful localization of these titles, including culturally relevant adaptations, has played a crucial role in their sustained popularity [15].

RPGs

RPGs dominate the MENA market by revenue, underscoring their broad appeal [22]. However, the growth of RPGs has been hampered by challenges in localization, particularly regarding storage and device requirements [1]. Despite these obstacles, RPGs remain a top category, highlighting the potential for growth with better localization efforts [1].

Sports Games

Sports games, particularly those focused on football, such as the FIFA/FC series and Pro Evolution Soccer, have a significant following in the MENA region [12]. These games reflect the region's passion for football and have successfully captured the local audience's interest.

Culturally Specific Games

There is a growing interest in games that resonate with local folklore, history, and cultural themes. Titles incorporating elements of Islamic history or Arabian Nights themes tend to be well-received [12]. This trend emphasizes the importance of cultural adaptation in game development for the MENA market. For instance, Tencent's Arabic version of PUBG Mobile has become one of the top downloaded games in the region, illustrating the impact of culturally tailored content [15].

Casual and Puzzle Games

The number of female gamers in the MENA region is on the rise, with many drawn to casual and puzzle games like Candy Crush Saga and Ludo King [10]. These games are popular due to their accessibility and social components, allowing players to compete with friends and family [10]. The social interaction and light-hearted entertainment these games offer are key drivers of their popularity among women

gamers in the region [10].

Challenges Facing Local Developers

The MENA region's gaming industry has shown enormous growth potential, but it faces significant challenges that hinder local developers from fully capitalizing on this opportunity. One of the primary issues is the lack of local game development, with the majority of mobile games being developed by foreign companies[6]. This limitation affects the region's ability to monetize its gaming industry and create innovative games tailored to local preferences and cultural nuances.

Monetization remains a critical challenge for mobile game developers in the MENA region. The diversity in payment systems and the reliance on cash transactions pose significant barriers. While global platforms like Google Play and Apple App Store offer in-app purchases, many players in the region prefer alternative payment methods, such as carrier billing or e-wallets, due to limited access to credit cards[10]. Additionally, high transaction fees associated with some payment methods can erode profit margins for developers, complicating the monetization strategy and making it challenging to maximize revenue potential[10].

The cultural landscape of the MENA region also presents unique challenges for game developers. Understanding and respecting religious and cultural sensitivities is crucial, as any misstep can significantly impact a game's reception[12]. Games that successfully incorporate local festivals, landmarks, and cultural references tend to see higher engagement[12]. However, the lack of local game development expertise means that these culturally relevant elements are often overlooked, further limiting the region's ability to develop games that resonate with local audiences.

Despite these challenges, the MENA region offers a massive opportunity for local game developers. By focusing on creating culturally relevant games that celebrate the region's rich heritage and traditions, local developers can fill the gap in the

market and attract a dedicated player base[6]. Collaborating with local influencers can also provide an authentic voice that resonates with the target audience, further enhancing the game's appeal[12]. International companies, like Ubisoft and MENA Mobile, are also recognizing this potential and are increasingly investing in the region, contributing to the local economy and facilitating knowledge transfer[7].

Future Trends and Opportunities

The mobile gaming market in the MENA region is experiencing exponential growth, driven by increased smartphone penetration and a tech-savvy population. One significant trend is the rise of localized content, with games tailored to regional cultures and languages gaining popularity[10]. Developers are increasingly incorporating Arabic language support and culturally relevant themes to enhance user engagement[10]. This culturalization effort is helping local games resonate more deeply with players, thereby increasing their appeal and usage.

Investment in local talent is essential to sustain this growth. More than 60% of the MENA population is under the age of 30, creating a robust talent pool that can be trained in game development[5]. Existing studios in the region are playing a pivotal role by upskilling workers from other industries[5]. This not only boosts the local economy but also attracts international companies like Ubisoft and MENA Mobile, which are investing in the region and contributing to knowledge transfer and job creation[7].

Technological advancements have further propelled the mobile gaming market to new heights. Improvements in smartphone hardware have allowed mobile games to become more sophisticated, enhancing the overall user experience[23][24]. High-speed mobile internet adoption has also been a key factor, making it easier for users to download and play high-quality games[10].

The pandemic has notably accelerated the growth of the mobile gaming sector, with

a significant increase in revenues and player counts[9]. Games like "Among Us," "Genshin Impact," and "Fortnite" saw substantial popularity during this period[9]. This boom has opened new avenues for developers to innovate and capture a larger market share.

Looking ahead, the integration of AR and VR technologies is set to create even more immersive gaming experiences[10]. Additionally, the growing infrastructure and investment in eSports are making competitive gaming more accessible and popular in the region[10]. The mobile gaming market is expected to continue its upward trajectory, with revenues projected to exceed \$5 billion by 2025[6].

Despite these promising trends, the industry still faces challenges, such as the need for more local game development. However, this gap presents a significant opportunity for local developers to create culturally relevant games that can fill the market void[6]. With strategic investments and a focus on culturalization, the MENA region is well-positioned to become a global hub for mobile gaming innovation.

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