GAMOTA
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Market Report

Mobile Game Industry 2024



Team Research and Development - Gamota

2024

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Key Takeaways

Global mobile game market revenue recovers, increased again. Console revenue slightly declined due to fewer game releases.

The total downloads from Vietnam’s game publishers have declined, but revenue remains unchanged, stable game quality.

A breakthrough year for new sub-genres in the Vietnamese market: Auto Chess, Idle RPG, Roguelike, and Tower Defense, with high-quality game releases.

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I. Global Game Market

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1.1. Market Overview

Key Takeaways

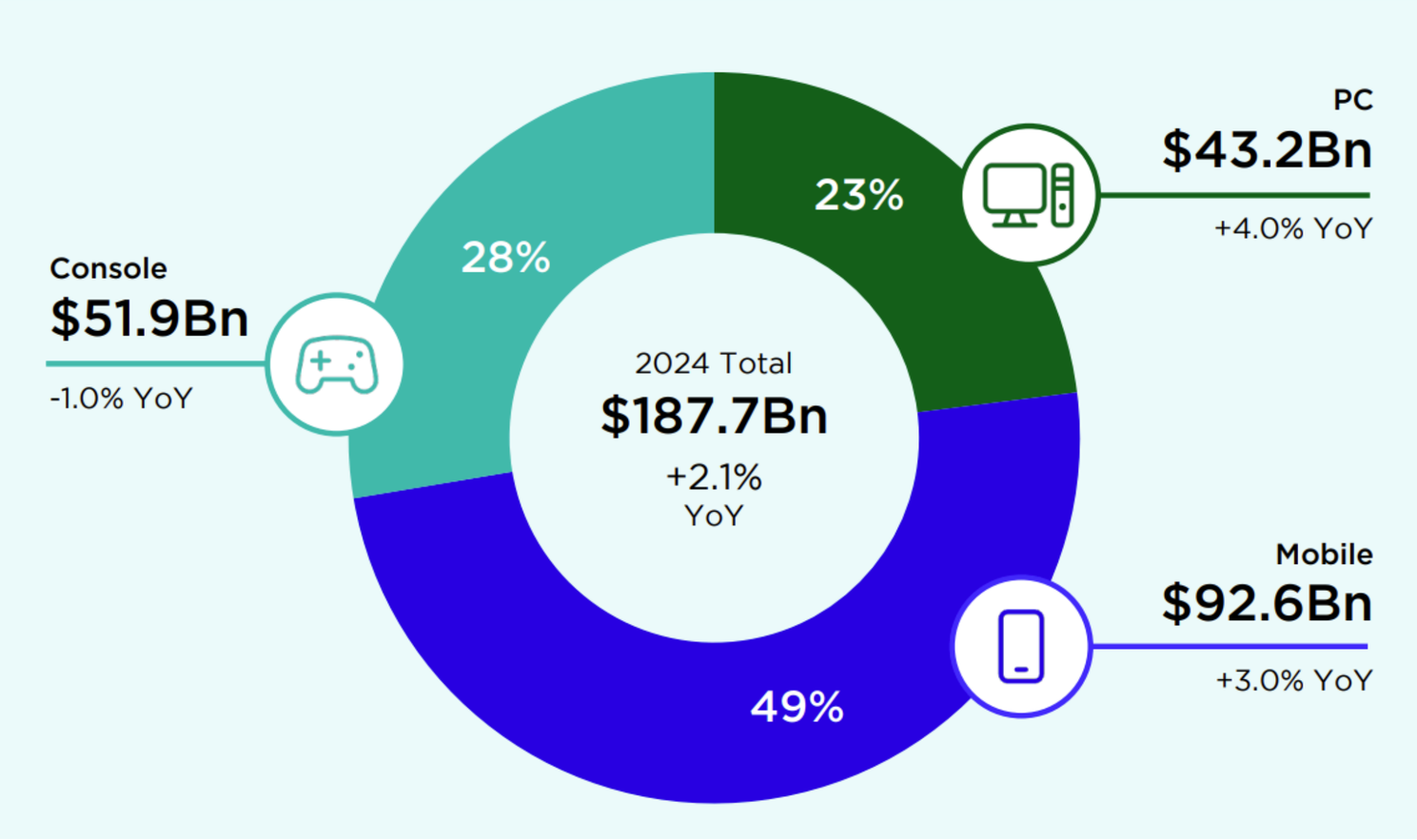
Global game market revenue recovers. Console games revenue slightly declined due to the quality of newly released games.

The global player base continues to grow, reaching approximately 42% of the world's total population in 2024.

Developers from Asia made strong impact with diverse genres and highly acclaimed releases this year.

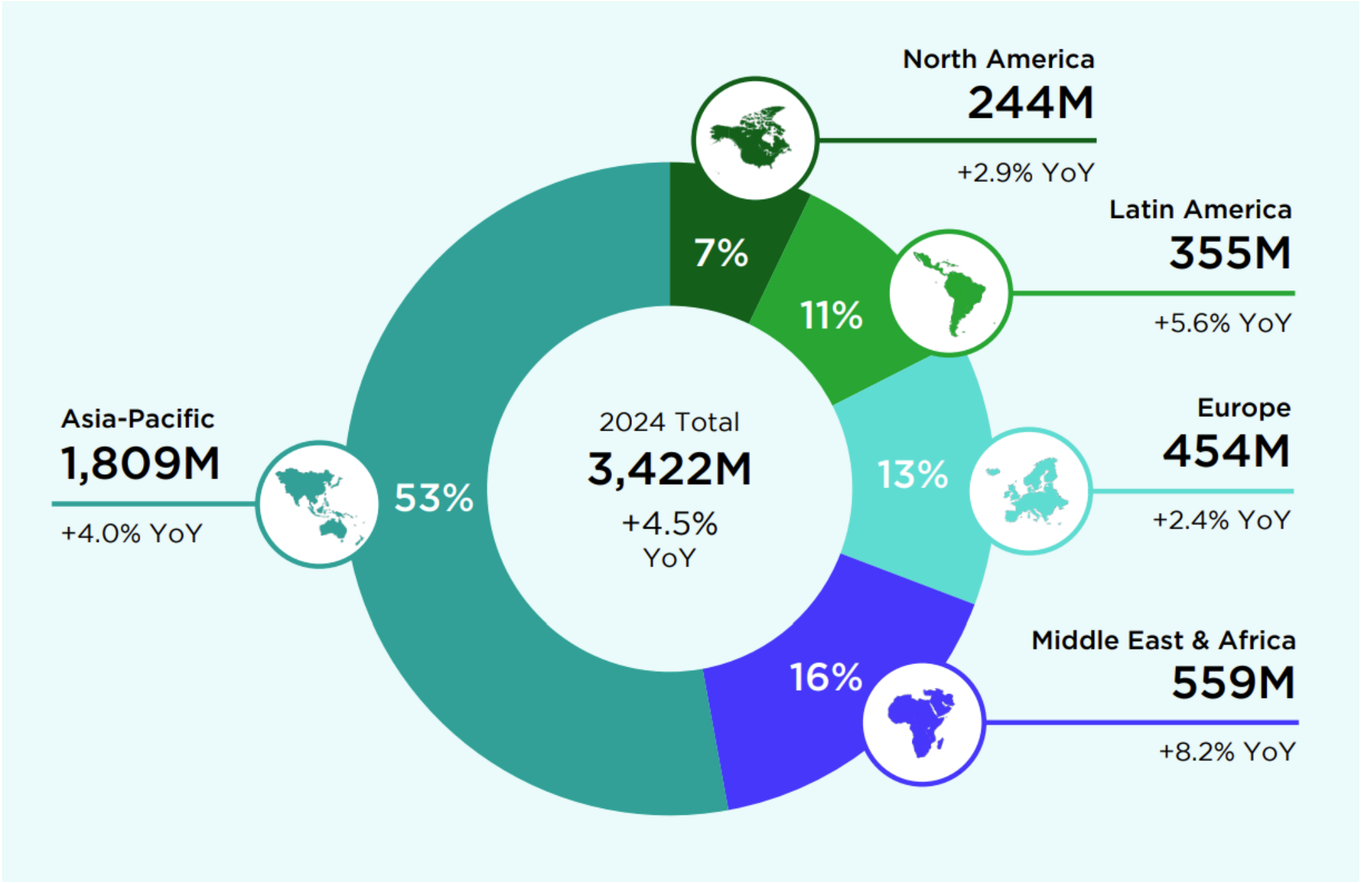
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Mobile games covers most of the Revenue
Console games shows sign of decline



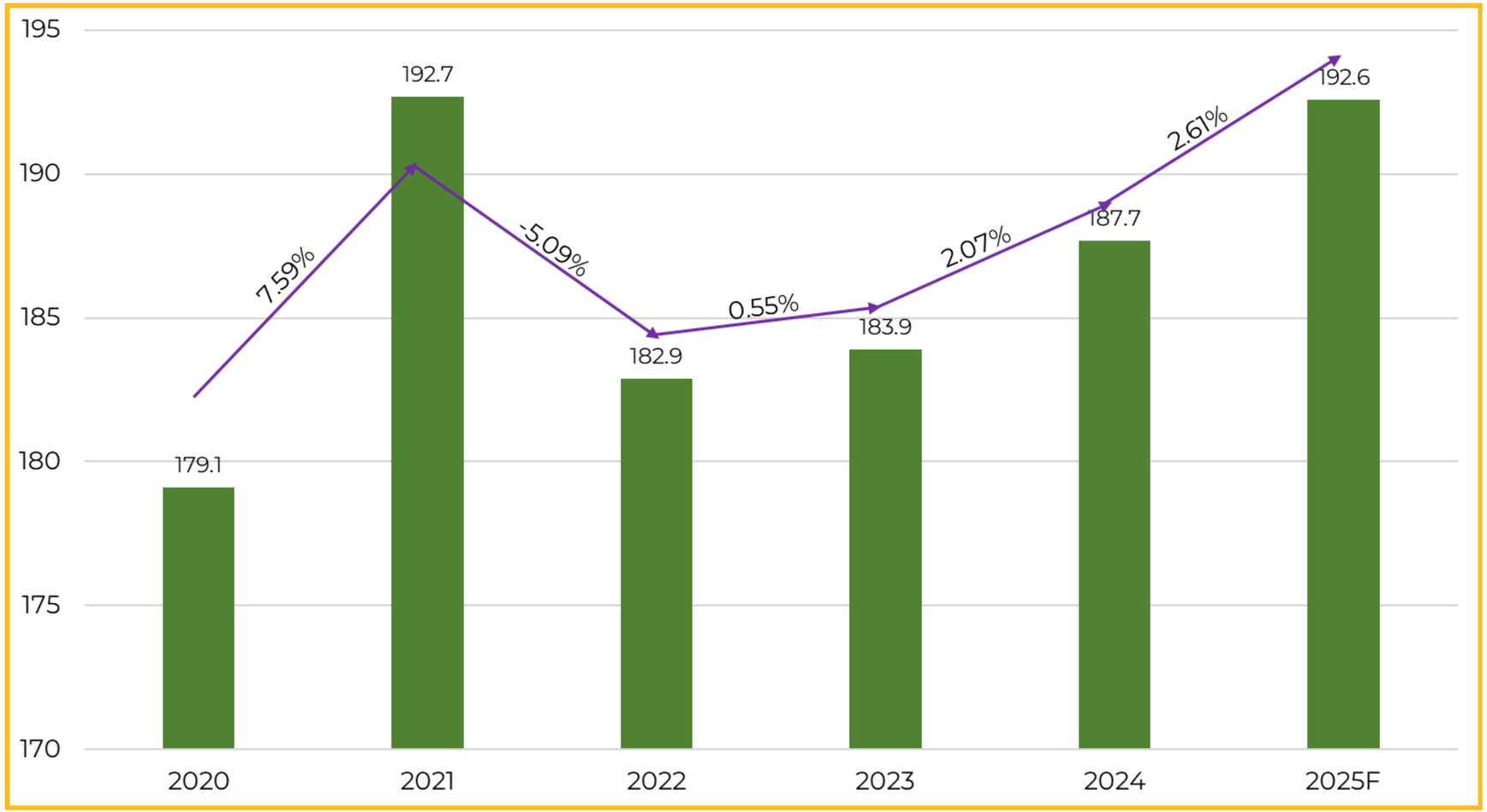
Reference: Newzoo-Global Games Market Report 2024

APAC covers 53% of the global player base
Middle East and Africa show the growth



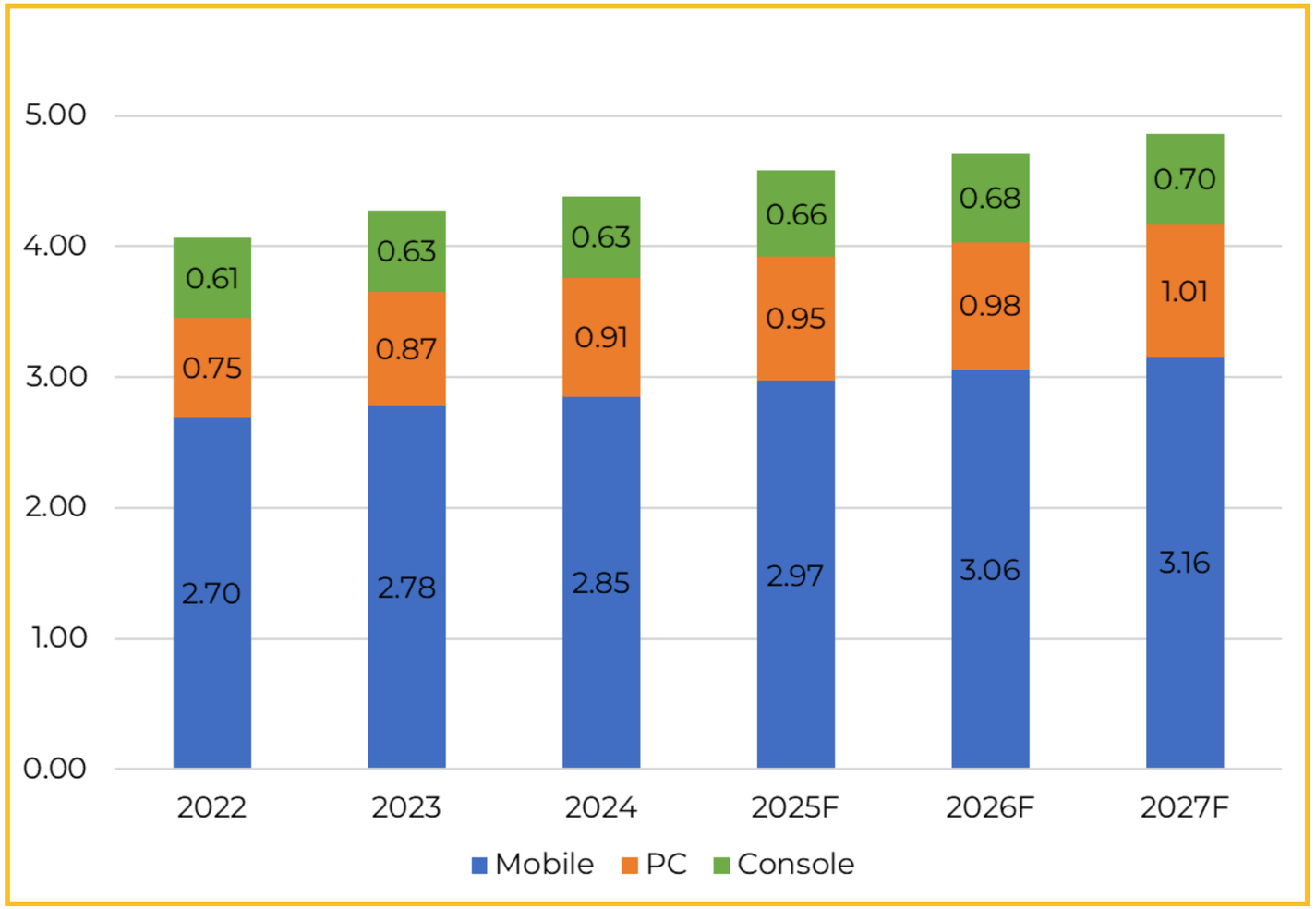
Reference: Newzoo-Global Games Market Report 2024

Revenue growth rate continued to rise
Estimated to 2.61% increase in 2025



Reference: Newzoo-Global Games Market Report 2024

Estimated number of players by device from 2022 to 2027 (in billions people)



Console players in 2024

0.63B

PC players in 2024

0.91B

Mobile players in 2024

2.85B

Reference: Newzoo-Global Games Market Report 2024

Black Myth: Wukong



Release date: 20/08/2024
Subgenre: ARPG Soul-like
Theme: Journey to the West
Publisher: Game Science
Platform: PC/Playstation



Features:

- Main Character design heavily inspired from China’s culture and literature
- The government of the People's Republic of China supports investment in developers, bringing the nation's culture to the global
- The game’s release date has no competitors launching new products, seizing the opportunity in the Soul-like game genre.



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Palworld



Release date: 19/01/2024
Subgenre: ARPG Survival
Theme: Pocket Monster
Publisher: Pocketpair
Platform: PC/XBox





Features:

- Combination of the Monster Catching mechanics from Pokémon and the exploration and survival elements of an Open World game.
- Monster designs are heavily inspired by the Pokémon games, attracting Pokémon players.
- Monsters can use their abilities to assist, attack, and, in some cases, even wield guns, v.v.

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Marvel Rivals

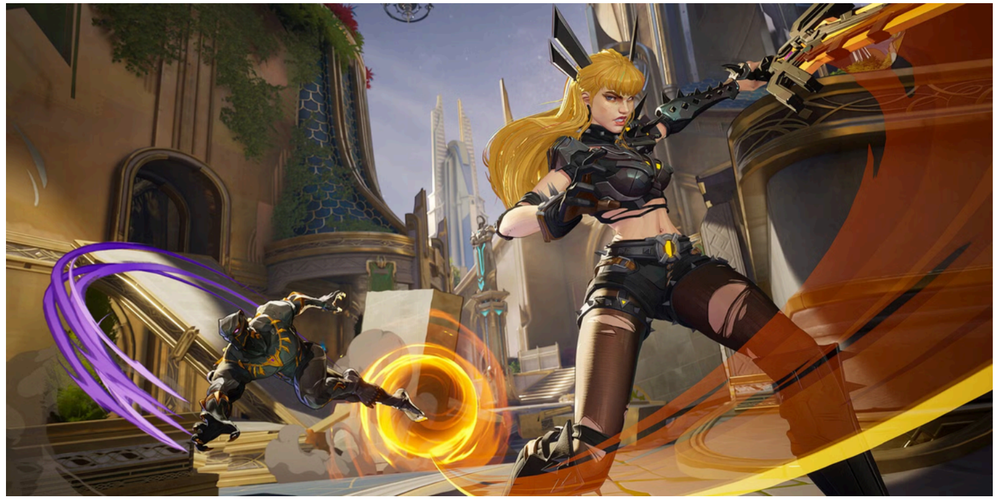


Release date: 06/12/2024
Subgenre: First person shooter
Theme: IP Marvel
Publisher: NetEase
Platform: PC/XBox/Playstation



Features:

- Marvel Rivals recreates a new Marvel universe with unique hero designs and stunning skill effects.
- Team-up in the game influences the abilities of heroes when selected together.
- During the launch, FPS games market was plunging low, with players gradually seeking newer gaming experiences.



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Infinity Nikki



Release date: 05/12/2024
Subgenre: Adventure + Dress up
Theme: IP Nikki
Publisher: Infold Games
Platform: Mobile/PC/XBox/Playstation



Features:

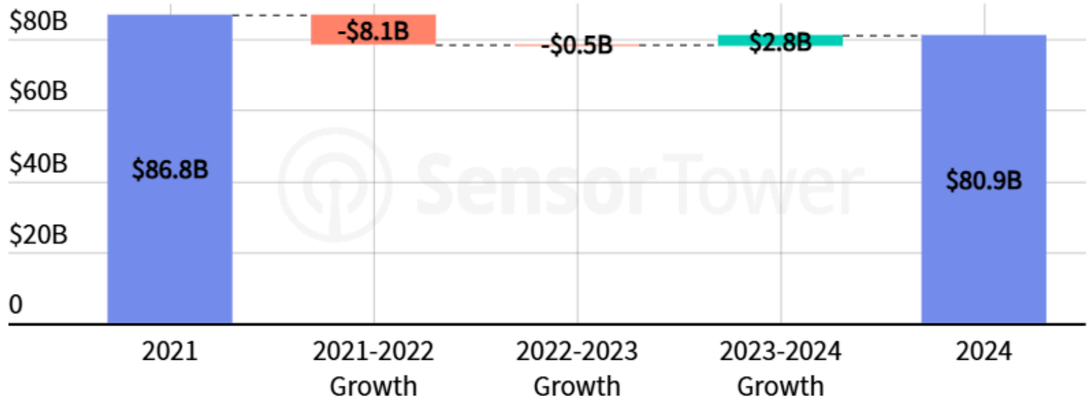
- Based on the famous Nikki, Infinity Nikki is the first open-world game in the series.
- Built a new Dress-up Open-world Adventure, appealing to both old and new players.
- Each costumes with unique abilities, helping players solve puzzles, battle monsters, and overcome challenges in the game.



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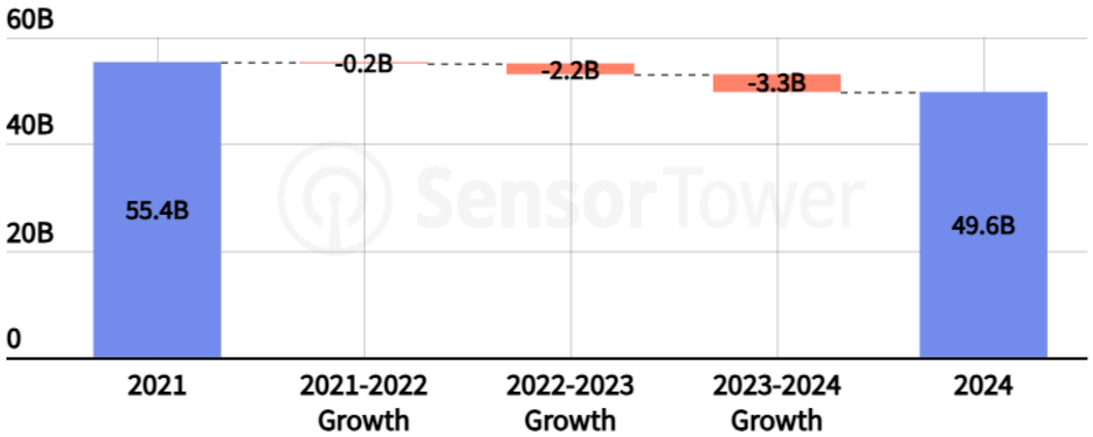
1.2. The Global Mobile Game Market

Total market downloads and revenue



2024 IAP Revenue
$80.9 Billion
(+4% YoY)

- **Turkey** leads revenue **increased 28%**, while **China** revenue **decreased 28.5%** due to economic challenges.



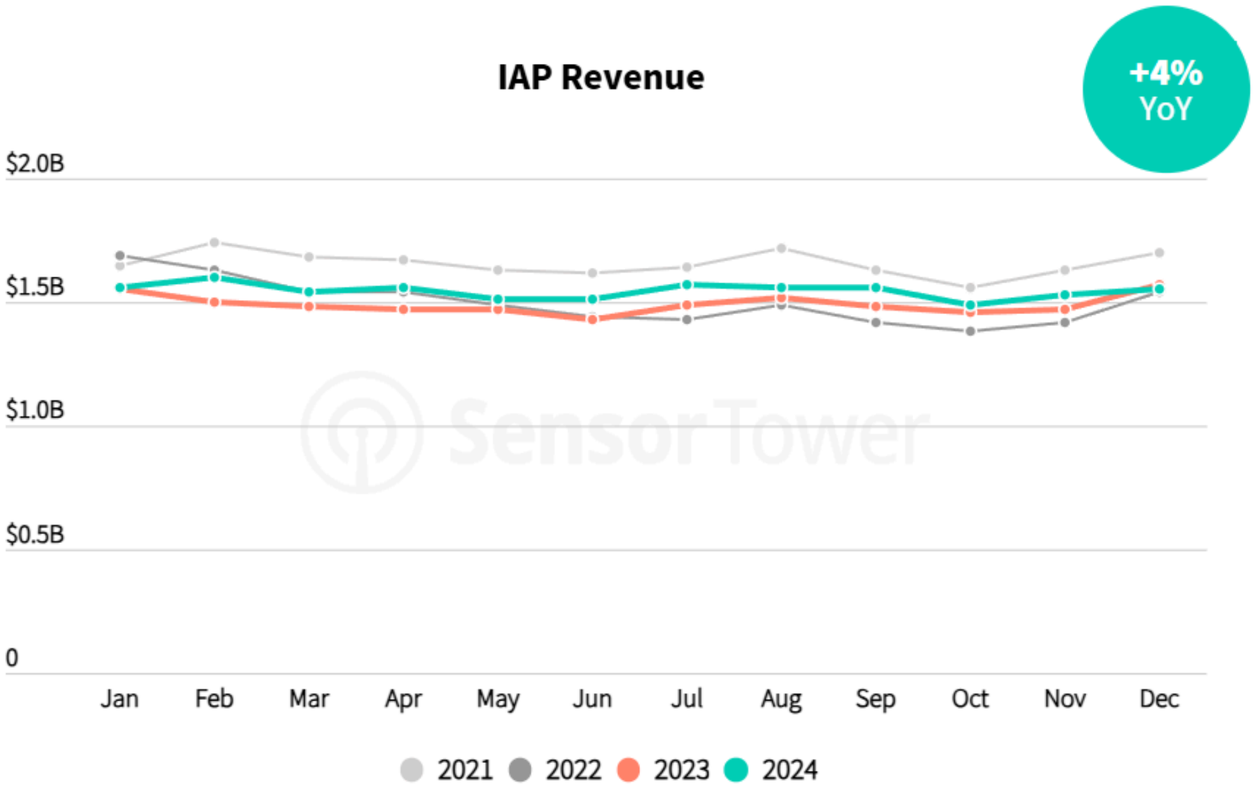
2024 Downloads
49.6 Billion
(-6% YoY)

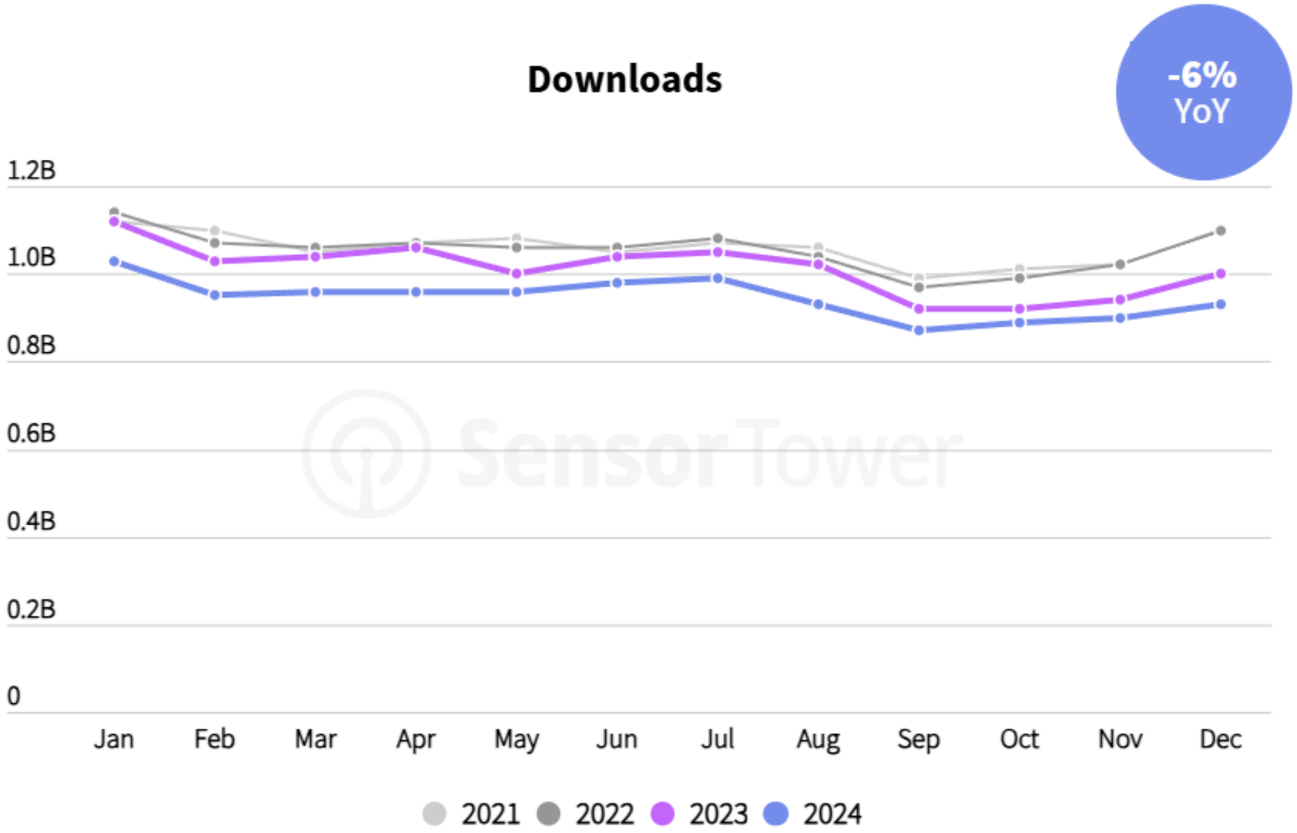
- While **most markets** experienced the **decrease** in Download, regions like **Indonesia and Saudi Arabia** showing signs of **increase**.

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Reference: Sensortower: 2025 State of Mobile

Average Monthly Downloads and Revenue





- Revenue and downloads in the global mobile gaming market remains consistent across years.
- Publishers focus on game releases, boost in the beginning and middle of the year, as this period includes holidays like summer break and New Year, attracting players to spend money in-game.

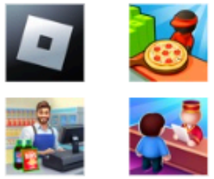
Reference: Sensortower: 2025 State of Mobile

Market share of genres by Downloads



#1 - Simulation

9.8 B in Downloads



YoY Downloads +0.4% ▲

YoY IAP Revenue +8.8% ▲

20% of All Downloads ▲

7.4% of All IAP Revenue ▲

#2 - Puzzle

9.7 B in Downloads



YoY Downloads -3.0% ▼

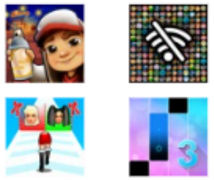
YoY IAP Revenue +14.0% ▲

20% of All Downloads ▲

14.9% of All IAP Revenue ▲

#3 - Arcade

9.6 B in Downloads



YoY Downloads -12.5% ▼

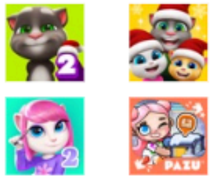
YoY IAP Revenue -22.6% ▼

19% of All Downloads ▼

2.0% of All IAP Revenue ▼

#4 - Lifestyle

4.0 B in Downloads



YoY Downloads -10.0% ▼

YoY IAP Revenue +51.4% ▲

8% of All Downloads ▼

2.5% of All IAP Revenue ▲

#5 - Tabletop

2.6 B in Downloads



YoY Downloads -7.3% ▼

YoY IAP Revenue +1.1% ▲

5% of All Downloads ▼

1.8% of All IAP Revenue ▼

#6 - Action

2.4 B in Downloads



YoY Downloads -7.9% ▼

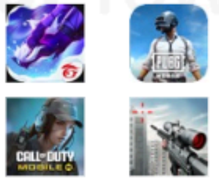
YoY IAP Revenue +46.0% ▲

5% of All Downloads ▼

4.4% of All IAP Revenue ▲

#7 - Shooter

2.4 B in Downloads



YoY Downloads +1.5% ▲

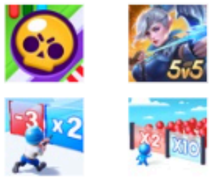
YoY IAP Revenue +3.4% ▲

5% of All Downloads ▲

5.3% of All IAP Revenue ▼

#8 - Strategy

2.1 B in Downloads



YoY Downloads +14.5% ▲

YoY IAP Revenue +16.2% ▲

4% of All Downloads ▲

21.4% of All IAP Revenue ▲

Reference: Sensortower: 2025 State of Mobile

Market share of genres by IAP Revenue



#1 - Strategy

$17.5 B in IAP Revenue

YoY IAP Revenue +16.2% ▲

YoY Downloads +14.5% ▲

21.4% of All IAP Revenue ▲

4% of All Downloads ▲

#2 - RPG

$16.8 B in IAP Revenue

YoY IAP Revenue -17.3% ▼

YoY Downloads -6.1% ▼

20.5% of All IAP Revenue ▼

3% of All Downloads ▲

#3 - Puzzle

$12.2 B in IAP Revenue

YoY IAP Revenue +14.0% ▲

YoY Downloads -3.0% ▼

14.9% of All IAP Revenue ▲

20% of All Downloads ▲

#4 - Casino

$11.7 B in IAP Revenue

YoY IAP Revenue +8.9% ▲

YoY Downloads -39.6% ▼

14.3% of All IAP Revenue ▲

2% of All Downloads ▼

#5 - Simulation

$6.1 B in IAP Revenue

YoY IAP Revenue +8.8% ▲

YoY Downloads +0.4% ▲

7.4% of All IAP Revenue ▲

20% of All Downloads ▲

#6 - Shooter

$4.3 B in IAP Revenue

YoY IAP Revenue +3.4% ▲

YoY Downloads +1.5% ▲

5.3% of All IAP Revenue ▼

5% of All Downloads ▲

#7 - Action

$3.6 B in IAP Revenue

YoY IAP Revenue +46.0% ▲

YoY Downloads -7.9% ▼

4.4% of All IAP Revenue ▲

5% of All Downloads ▼

#8 - Sports

$2.7 B in IAP Revenue

YoY IAP Revenue -6.3% ▼

YoY Downloads -10.6% ▼

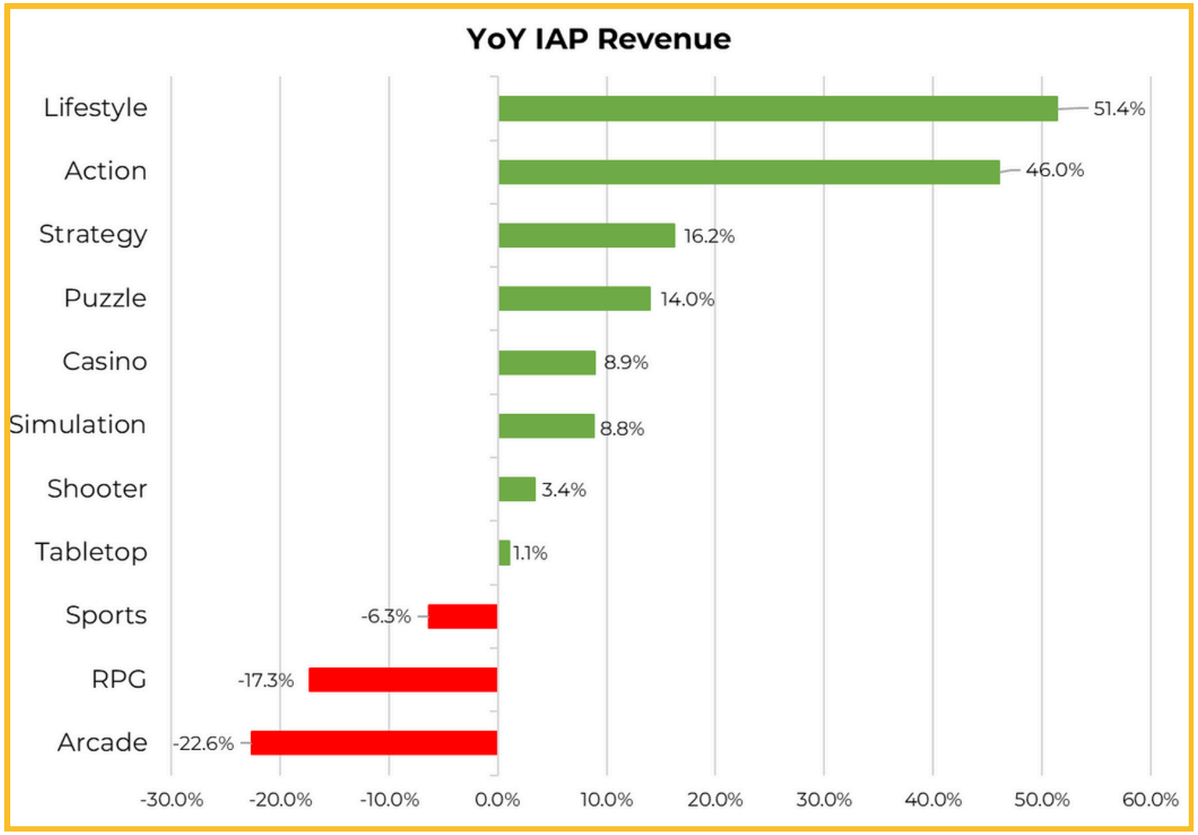
3.4% of All IAP Revenue ▼

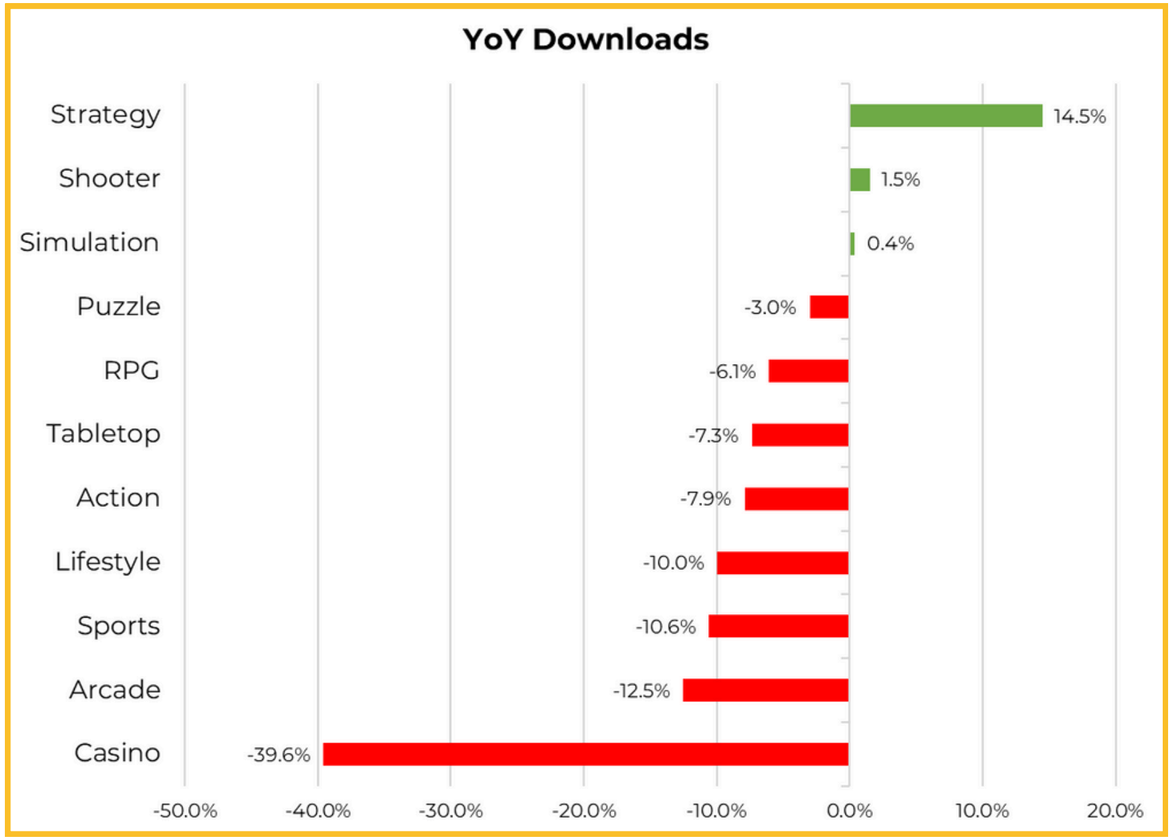
4% of All Downloads ▼

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Reference: Sensortower: 2025 State of Mobile

Top genre by IAP revenue and downloads show opposite trend





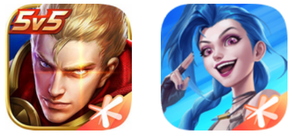
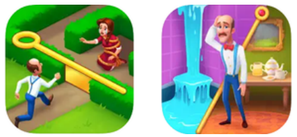
Game quality improves as revenue continues to grow strongly despite a decline in downloads

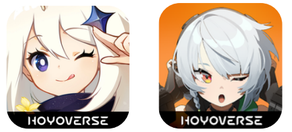
RPGs remain among the top genres in downloads and revenue, but shown of declining trend over the years.

Strategy grows strong in both Downloads and IAP Revenue

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Tencent dominates global mobile game downloads and revenue
Hybrid-casual gaming Publishers occupy most of the rankings

Publisher	Revenue	Download	Featured games
Tencent	$6.3B	358M	
Scopely	$2B	174M	
Playrix	$1.7B	216M	
NetEase	$1.7B	193M	
Dream Games	$1.5B	122M	

Publisher	Revenue	Download	Featured games
King	$1.5B	171M	
Supercell	$1.4B	239M	
miHoYo	$1.3B	82M	
FirstFun	$1.2B	102M	
Roblox Corporation	$1.2B	279M	

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Reference: Anton Slashcev - App Magic

Featured global mobile games

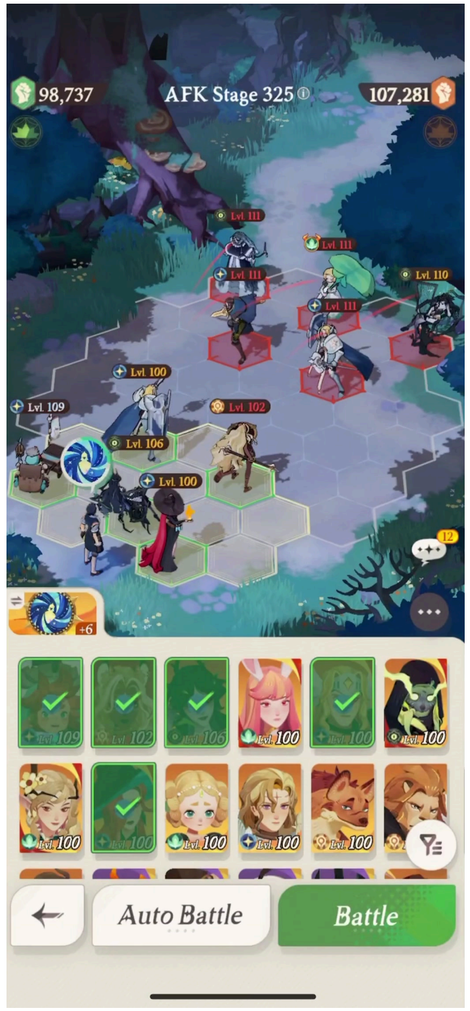
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AFK Journey

Sub-genre: Team Battle + MMORPG
Theme: Fantasy
Publisher: Farlight Games
Platform: Android và IOS
App size: 6.55 GB
Features:

- Building on the popularity of its predecessor, AFK Arena, AFK Journey continues its theme and designs
- Rains the unique stylized designs, transforming characters from 2D to 3D
- Preserves the Team Battle and Idle RPG mechanics, adding the Open World and MMORPG aspects to enhance the game's social experience.





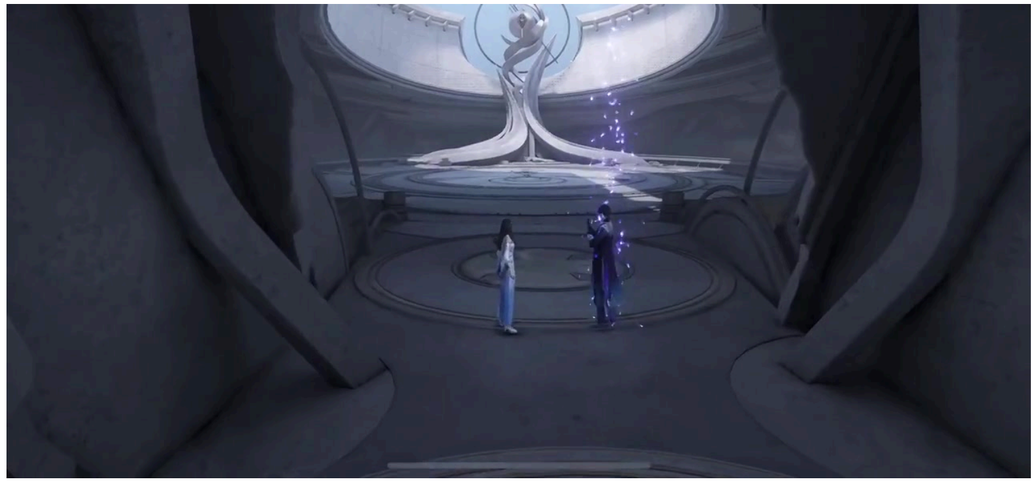


Love and Deepspace

Sub-genre: Otome + ARPG
Theme: Modern Fantasy
Publisher: Infold Games
Platform: Android và IOS
App size: 12 GB
Features:

- Infold Games studied its existing female player base from previous Nikki series games, utilizing user behaviors.
- The game combines dating simulation with ARPG combat
- Featuring real-world interactions, allowing players to work, study, or exercise together.
- Game introduced new features focusing on female players' health and well-being.







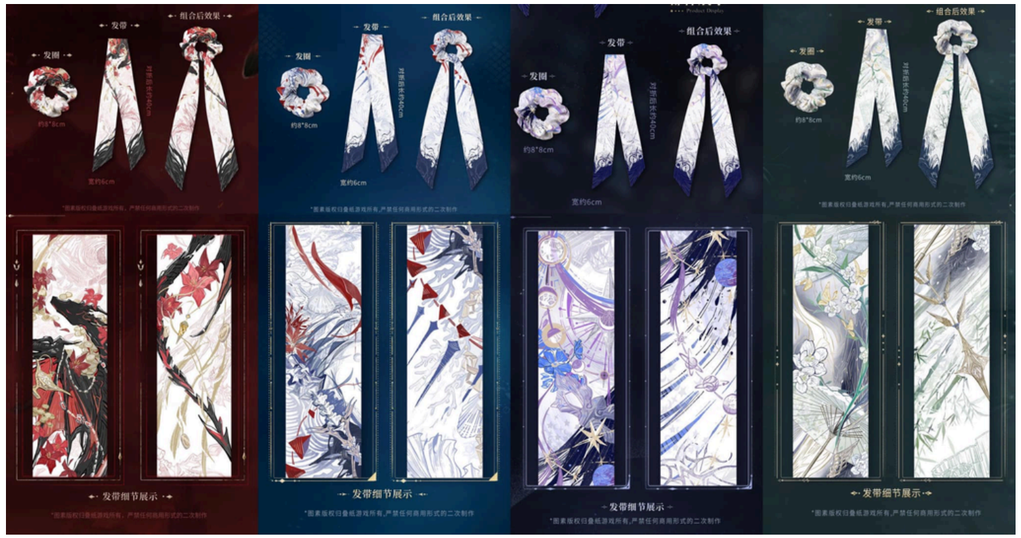
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Love and Deepspace

The game also provides fan service to its community through **costumes, birthday events, story events, and various themed content.**
The publisher creates **merchandise** featuring in-game love-interests, such as pins, hair ties, and figurines, allowing players to feel closer to their ‘lovers’.

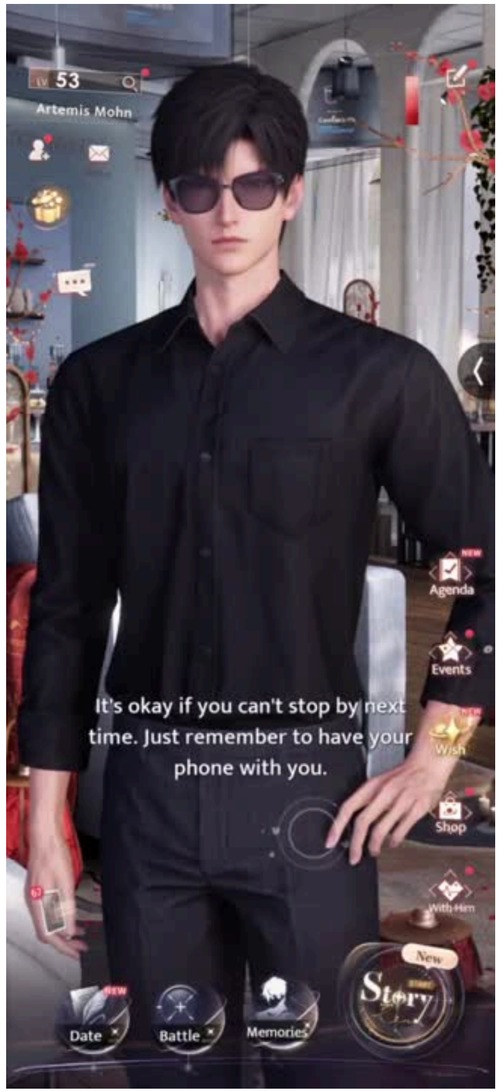






Love and Deepspace

- The health-related features include tracking time to sleep, eat, and wake-up to the player desires.
- It can also remember special days in the player's life such as birthdays, meetings, social events, etc.
- The most unique and newest feature allows players to ask the in-game male characters to track their menstrual cycle.





II. Vietnam Mobile Game Markets

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Total Download declines, Revenue rises

Total Download

1.6B+

-10% YoY

Global rank Dowloads

#9

-1

Total Revenue

$800M+

+2% YoY

** Includes IAP and local payment*

- Revenue continues to grow slightly, **reaching more than $800M**, indicating that Vietnam's market steadily development, though the growth rate slow.
- **Downloads continues to decline**, suggesting the new products in the market shows no attraction to draw in players.

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Note: The data includes both licensed and unlicensed games released in Vietnam.

Information on Vietnamese Publishers in the Vietnamese Mobile Game Market

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Total Downloads and Revenue from Vietnamese Publishers

Total Downloads

130M+

-15% YoY

Total Revenue

$292M

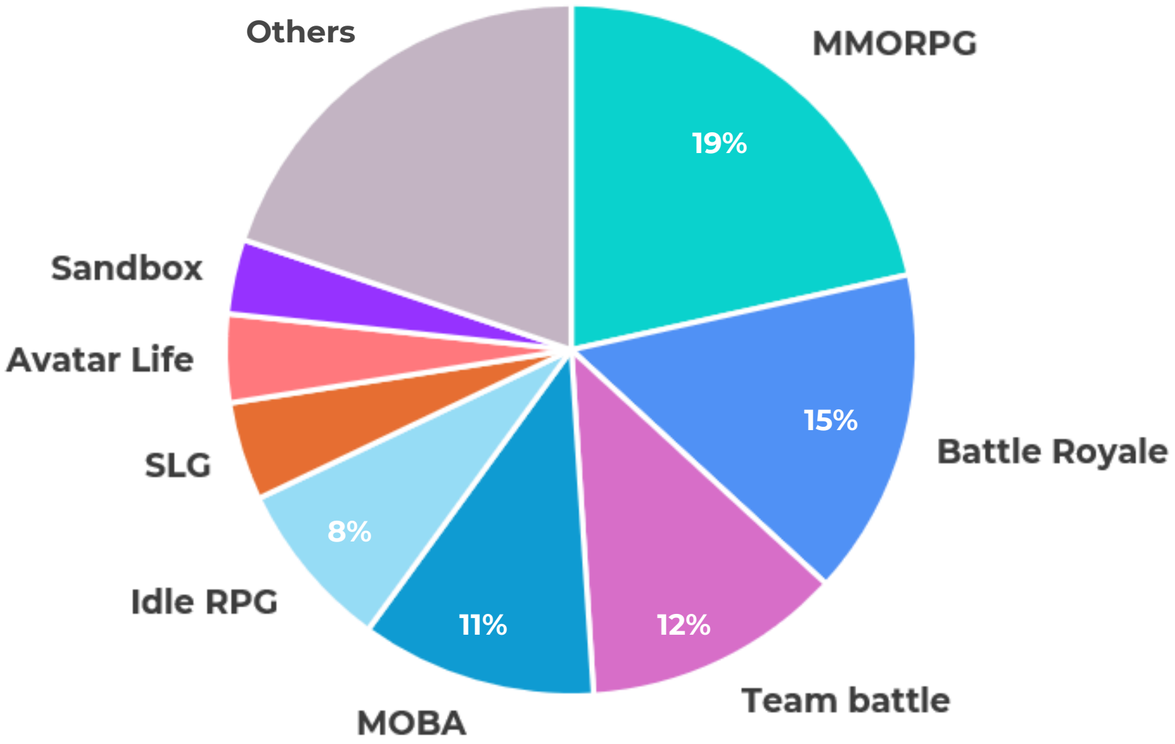
+0.3% YoY

The Vietnamese mobile game market in 2024 experienced a decline in download but total revenue remains nearly unchanged.
Key reasons include:

- An increase in new game releases, but most of the quality were average to low
- Majority of the declining downloads came from sub-genres like **MMORPG and SLG**, which dominate the market.

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Download share by Sub-genre



#1 - MMORPG




24M+ Download
19% of all Download
YoY Download **-42%**

#2 - Battle Royale




19M+ Download
15% of all Download
YoY Download **+19%**

#3 - Team Battle




15M+ Download
12% of all Download
YoY Download **+6%**

#4 - MOBA




13M+ Download
11% of all Download
YoY Download **-17%**

#5 - Idle RPG




10M+ Download
8% of all Download
YoY Download **+66%**

#6 - SLG




5M+ Download
8% of all Download
YoY Download **-11%**

#7 - Avatar Life



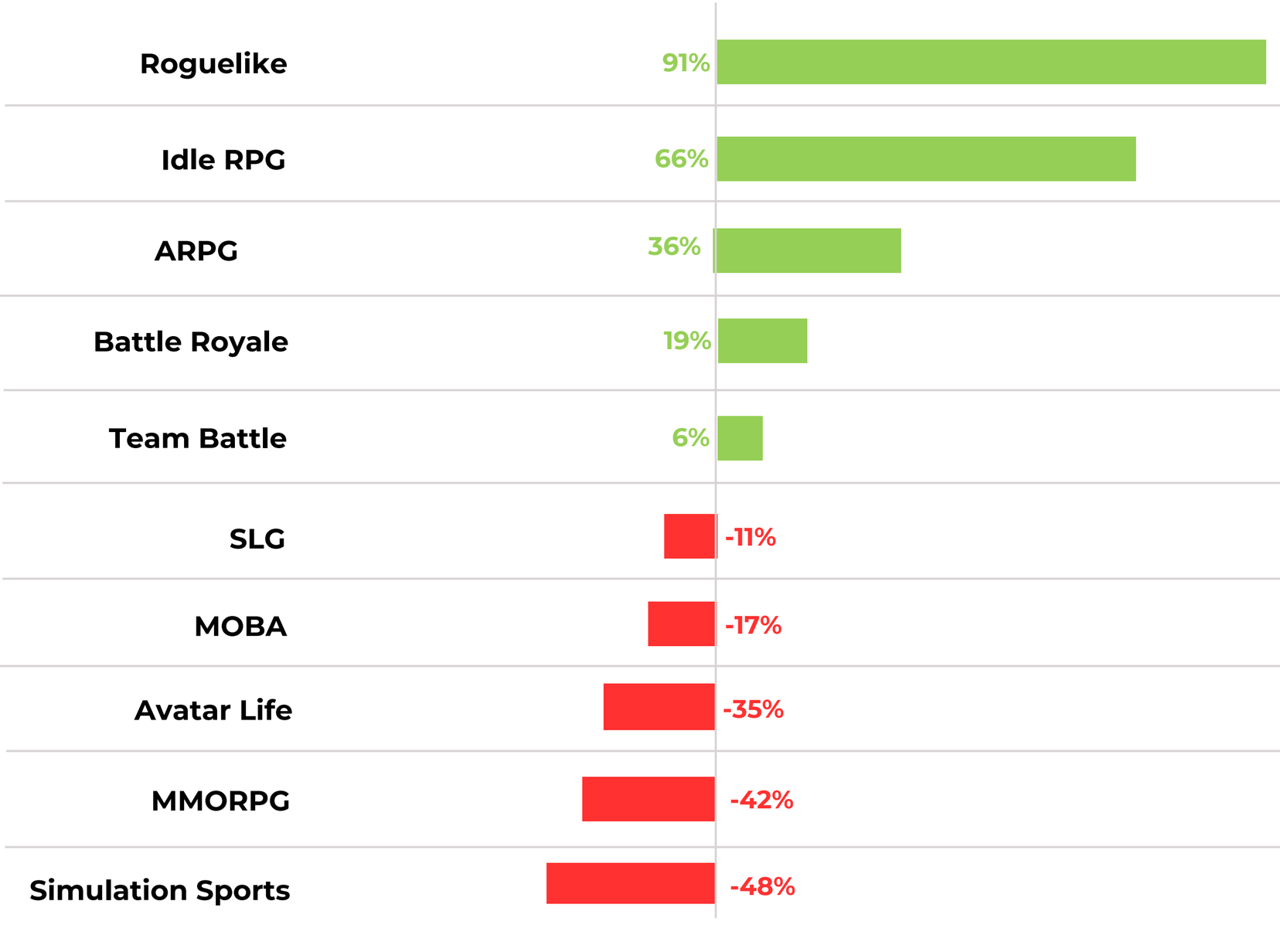
5M+ Download
4% of all Download
YoY Download **-35%**

#8 - Sandbox



4M+ Download
3% of all Download
New Sub-genre

Download Growth by Sub-genre



#1 Game by Downloads



Đại Hiệp Chạy Đi
Download: **900K+**



Tiểu Yêu Tầm Đạo
Download: **2M+**



Đỉnh Phong 2
Download: **500K+**



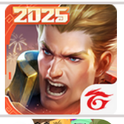
Free Fire
Download: **15M+**



Honkai: Star Rail
Download: **1M+**



Rise of Kingdoms
Download: **500K+**



Arena of Valor
Download: **9M+**



Play Together
Download: **5M+**



Kiếm Thế Origin
Download: **500K+**



Be A Pro VTC
Download: **1M+**

New Games in the Vietnamese Mobile Game Market

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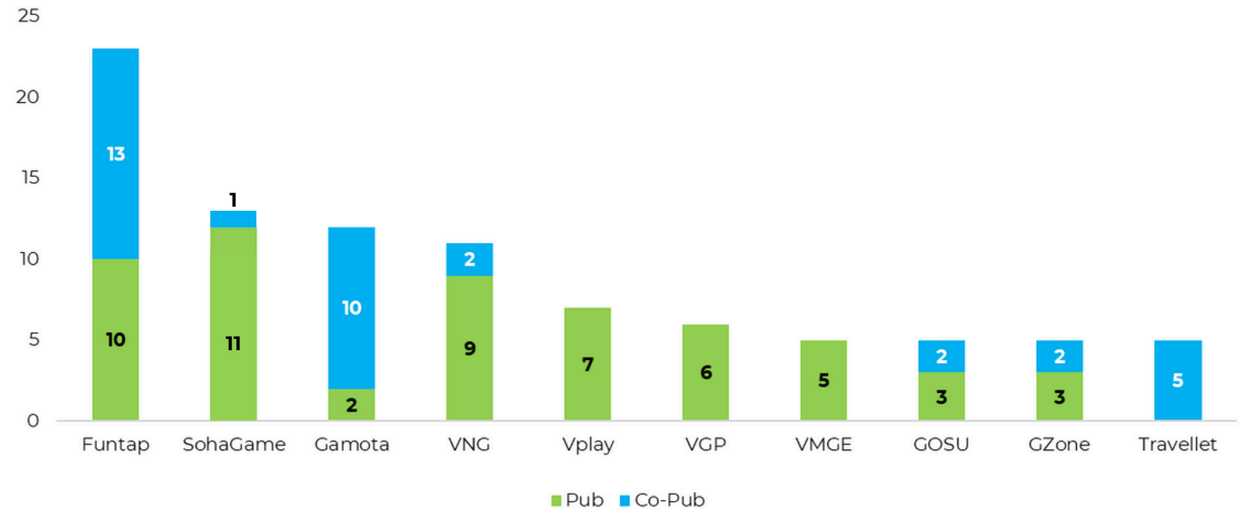
Number of new games in Vietnam in 2024

Total Download
40M+
+12% YoY

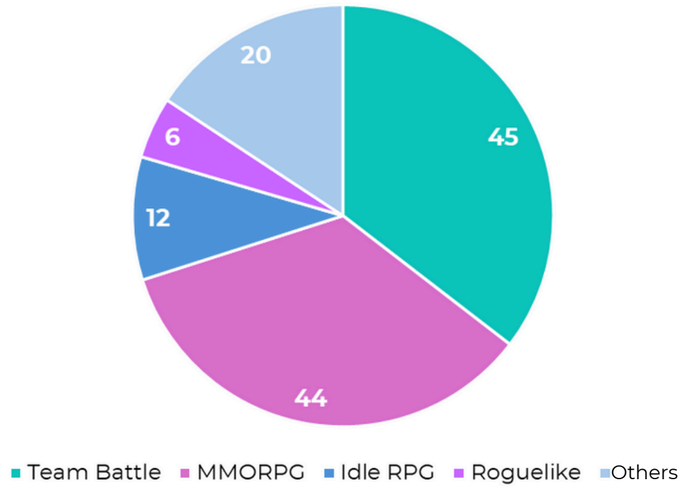
Total Revenue
$70M+
-22% YoY

Total New Games
127
+25 games

Number of games published by Vietnamese publishers in 2024



Number of games by sub-genre



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Featured new games in the Vietnamese market

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Lục Tung Tam Quốc

Release date: September 2024
Sub-genre: Team battle
Theme: Three Kingdom
Publisher: Vplay
Platform: Android, IOS and H5/HTML
App size: 1GB
Features:

- Multi-platform games on Mobile devices and H5 web-based
- Game combines **Team Battle** mechanics with **Idle Lootbox** and equipment systems, allowing players to enhance the entire team's strength.
- Features a classic art style, reminiscent of old H5/HTML games from the past.







Legend of Mushroom

Release date: March 2024
Sub-genre: Idle RPG
Theme: Fantasy
Publisher: Sparkgame
Platform: Android and IOS
App size: 723.99 MB
Features:

- Game features Mushroom themed characters from the Ragnarok and Maple Story
- Incorporates Lootbox system from Slot Machine games, enhancing curiosity and addiction as players gamble for high- or low-tier items.
- Strong social features allow for player interaction beyond just chatting with a social network.







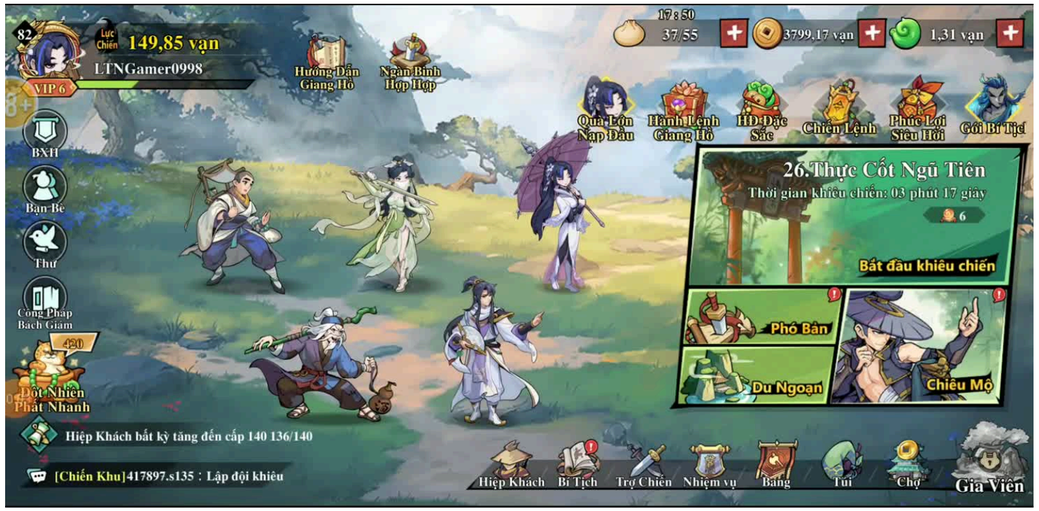
Võ Lâm Đại Minh Tinh

Release date: October 2024
Sub-genre: Tower Defense
Theme: Xianxia/Wuxia
Publisher: MG.OL
Platform: Android and IOS
App size: 1.5 GB
Features:

- A stylized anime art style, each hero is uniquely designed.
- The game combines Tower Defense and Roguelike mechanics, offering a fresh gameplay experience.
- At launch, the Tower Defense genre had very few new releases in 2024, making this hybrid game stand out and quickly attract players.







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III. News and Trends in Gaming

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Key Takeaways

GenAI tools are actively being researched and integrated into the game development process.

Mobile game development is following the success of popular PC games and previously successful mobile titles.

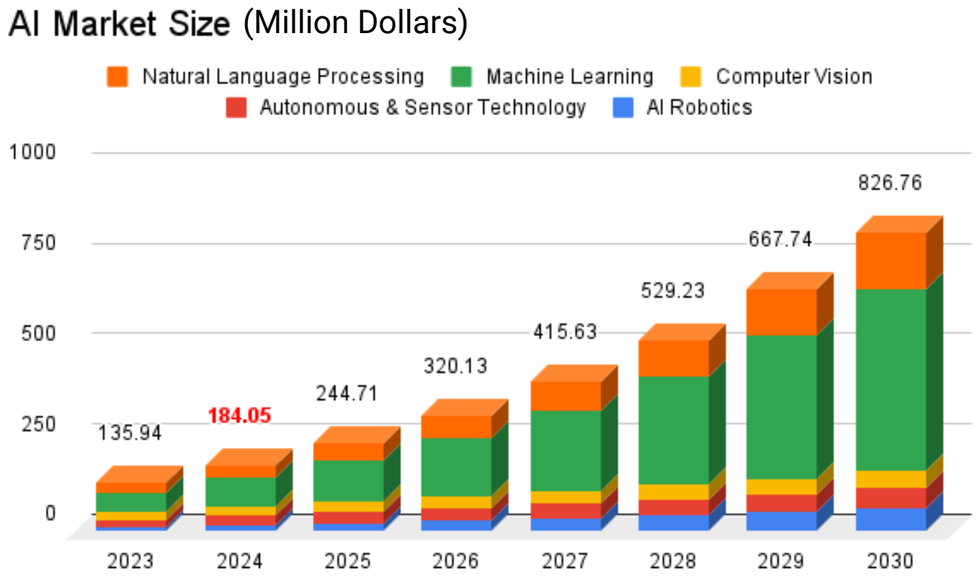
Games now incorporate 2-3 sub-genres, creating unique experiences that attract players from various gaming backgrounds.

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3.1. GenAI Trends in the Gaming Industry 2024

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Market Size AI reached up to 184.05B$ in 2024



AI Market Size 2024

184.05B USD
(+35,38% YoY)

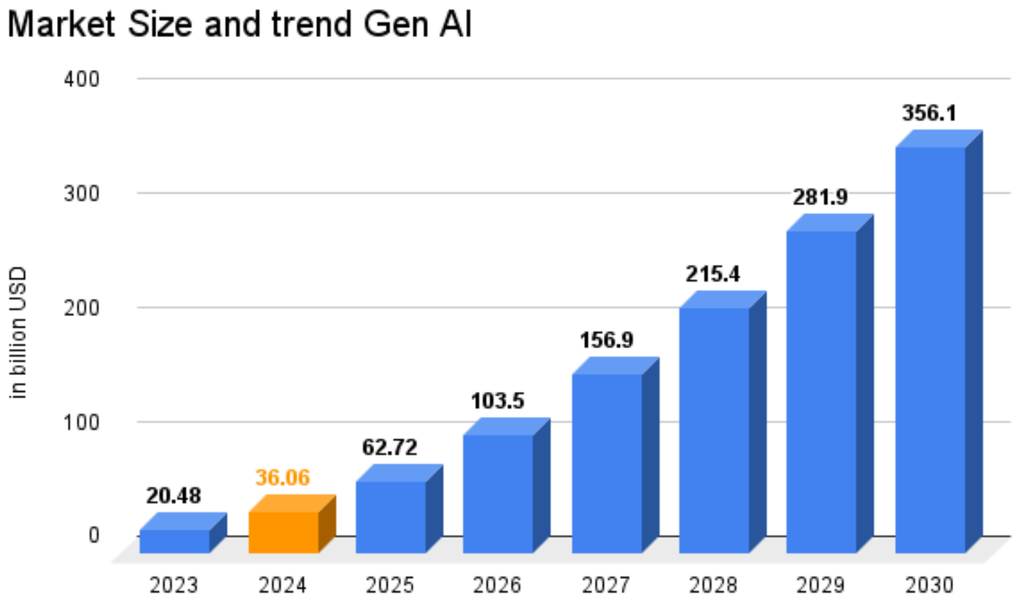
CAGR 26.67%
(2025-2030)

Machine Learning receives the most investment, accounting for 43% of the industry's total market share.

Gen AI Market Size

36.06B USD
(19.5% AI Market Size)

CAGR 32.2%
(2025-2030)

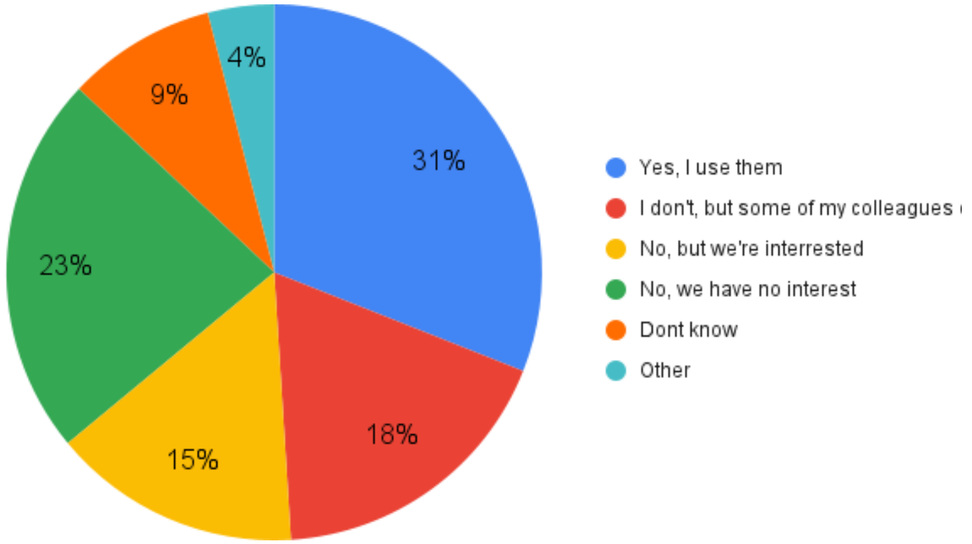


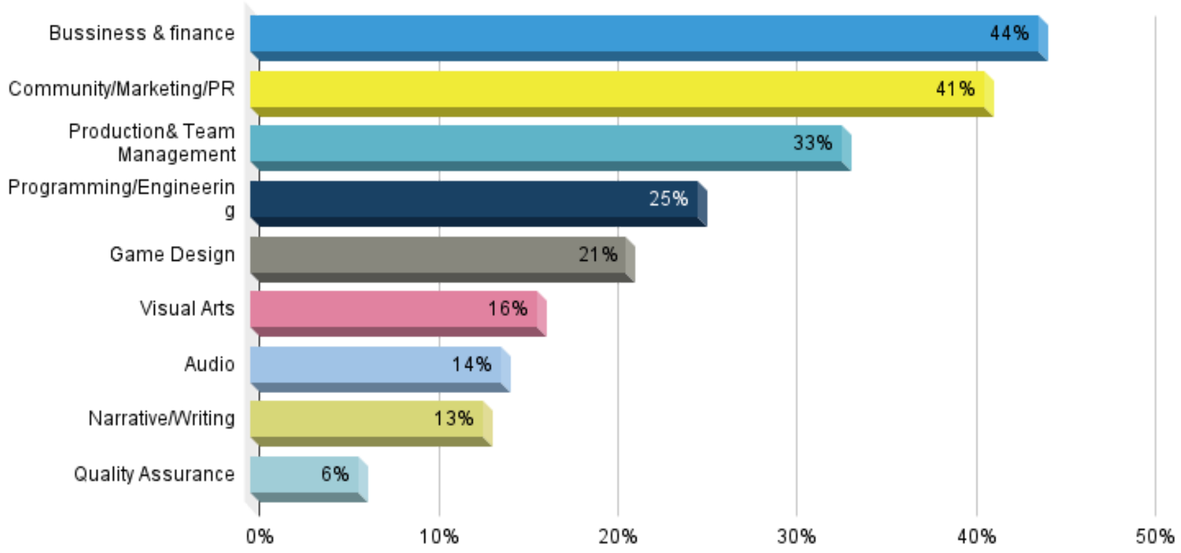
References: Statista

Uses of AI in the Gaming Industry

(Survey of 3000 game studios around the global)

Approximately **64%** of professionals takes interested in using GenAI in the workplace, with nearly **49% already using or having used it**. This reflects the creativity and efficiency-enhancing potential of GenAI tools.





Game studios primarily apply GenAI in **finance (44%)** and **media marketing (41%)**.

GenAI tools for **game production** are also gaining interest and investment, particularly in Programming/Engineering (25%), Game Design (21%), and Visual Art (16%).

Reference: 2024 State of the Game Industry

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Emerging GenAI Trends in 2024



Natural Language Processing (NLP)

- AI Chatbots for Customer Service
- Multilingual AI Systems
- Real-Time Transcription & Translation Tools
- SEAMLESSM4T: *Capable of real-time speech translation in 101 languages, while preserving the speaker's tone and emotions.*



Game Production

- Create Assets in game, Animation and Video (Kling AI, Luma AI, Flux AI, Stable Diffusion,...)



Media Marketing

- **Watson Campaign Automation:** *Uses AI to analyze customer data, predict behavior, and optimize marketing campaigns based on collected insights.*
- **Marketo Engage:** *A marketing automation platform leveraging AI to analyze user behavior, forecast trends, and personalize content, enhancing campaign effectiveness.*

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Reference: Deconstructor of fun

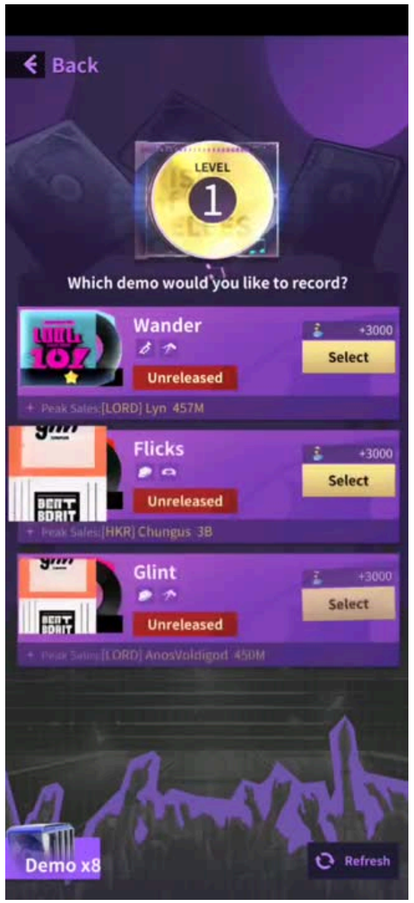
Top Girl - 90% of game assets taken from GenAI

Sub-genre: Simulation
Theme: Realistic
Publisher: A3Games
Platform: Android and IOS
App size: 678 MB
Features:

- Almost all in-game assets are created using GenAI, delivering realistic and captivating AI-generated female characters.
- Players take on the role of a manager, assembling a team of talented AI-generated girls to produce visually stunning and engaging AI-powered music videos (MVs).





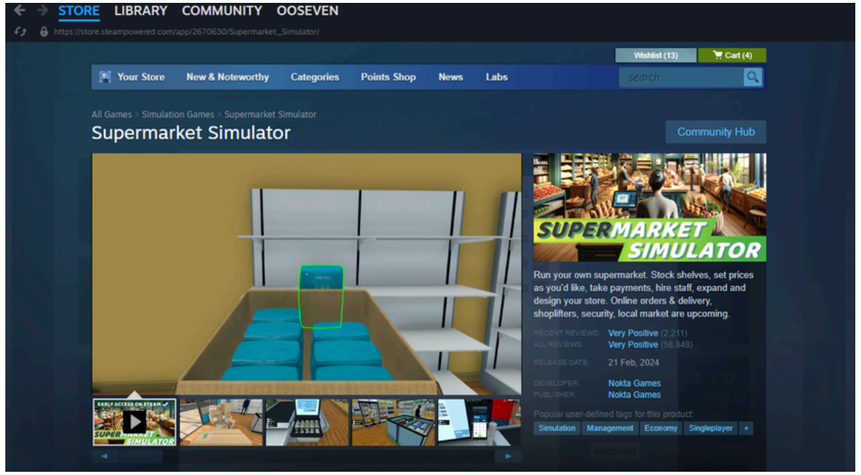


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3.2. Developing Mobile Games from PC Games

Keeping Up with PC Game Trends on Mobile

- PC-Exclusive Hits Expanding to Mobile: Popular Steam-only titles are now launching on mobile with enhanced features. Adapting Market Trends, catching up with trending PC games helps accelerate mobile game success.
- Example of **Supermarket Simulator** (2024): Steam downloads surged, leading to a mobile version with improved UI/UX, graphics, and free installation. Results in **38M+** downloads after launch.



Breakout Rank	Current Period Rank	Change	Unified App	Taxonomy
1	9	▲ 194	Satisroom: Perfectly Organize	Simulation | Simulator
2	3	▲ 5	My Supermarket Simulator 3D	Simulation | Simulator
3	53	▲	The Superhero League 2	Puzzle | Riddle
4	79	▲	Snow Race 3D: Ice Bridge Run	Racing | Arcade Racing
5	31	▲ 284	Count Masters: Stickman Games	Arcade | Platformer / Runner
6	34	▲ 253	Traffic Racer Pro : Car Games	Simulation | Driving / Flight Simulator
7	65	▲ 922	Downhill Race League	Racing | Arcade Racing
8	43	▲ 324	Archery Clash!	Arcade | Arcade Combat
9	21	▲ 65	Vita Mahjong	Casino | Mahjong
10	208	▲	Bus Frenzy : Station Shuffle	Puzzle | Riddle

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Reference: deconstructoroffun

Improving Graphics

Steam/PC Version
(Supermarket Simulator)





Mobile Version
(My Supermarket Simulator 3D)





Reference: deconstructoroffun

Graphics, UI/UX, and Time as Key Success Factors

Most successful Mobile version

Name: My Supermarket Simulator 3D
Release date: 19/07/2024
Download: 1M+ Revenue: $10K+





Name: Supermarket Simulator Games 3D
Release date: 29/08/2024
Download: 1M+ Revenue: $100K+





Non-successful Mobile version

Name: Supermarket Simulator City 3D
Release date: 08/10/2024
Download: 200K+ Revenue: $1K+





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Reference: deconstructoroffun

3.3. Game Templatization

Templatization

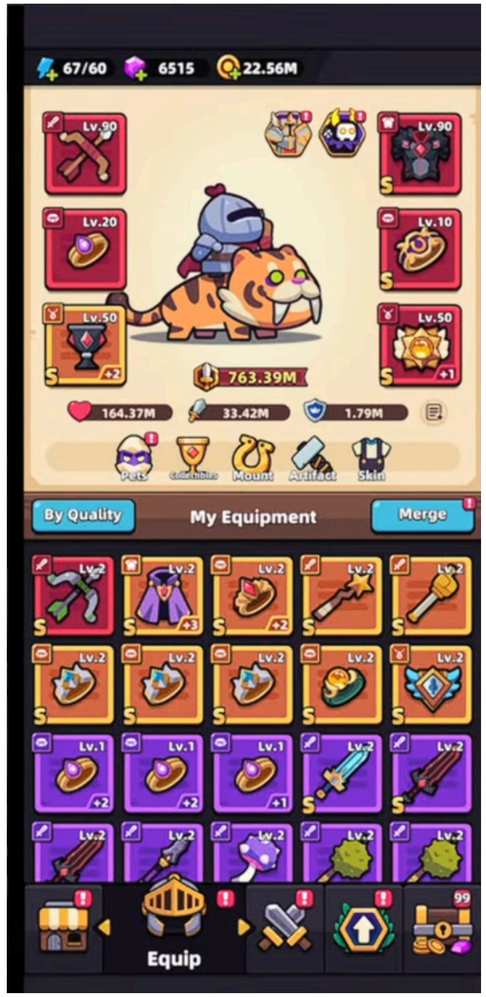
- **Adopting Proven UI/UX & Core Mechanics:** Using or drawing inspiration from successful game designs helps attract both existing and new players within the same genre.
- **UI/UX Evolution in 2024:** Following the rise of polished interfaces, especially after the success of Idle RPGs like Legend of Mushroom and Capybara GO!
- **Publisher Strategy – Sticking to a Core Genre**: Publishers can specialize in a genre while integrating sub-genres. MiHoYo focuses on ARPGs while incorporating Open World, Turn-Based, and Hack 'n' Slash elements.











Reference: deconstructoroffun

3.4. Games Combining Multiple Sub-Genres

Games with Multi-Genre Blends

Game Mobile trends in 2024, combining 2-3 different sub-genres in order to:

- **Innovation & Creativity:** Combining 2-3 sub-genres leads to fresh, engaging gameplay.
- **Broader Audience Appeal:** Attracts players from different game genres, expanding the player base.
- **Enhanced Gameplay Interaction:** Prevents monotony, keeping players engaged longer.
- **Reduced Market Competition:** Unique hybrids help stand out in a crowded market.



Reference: deconstructoroffun

Multi-genres games published in Vietnam

Currently in Vietnam has emerged this multi-genre trends with **Tower Defense + Roguelike**: Võ Lâm Đại Minh Tinh and Zombie Boom! being on top of the Tower Defense Revenue in 2024









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Thanks for watching !

Team RnD - Gamota
For contributions and additions, please send an email:
namnb@appota.com

