

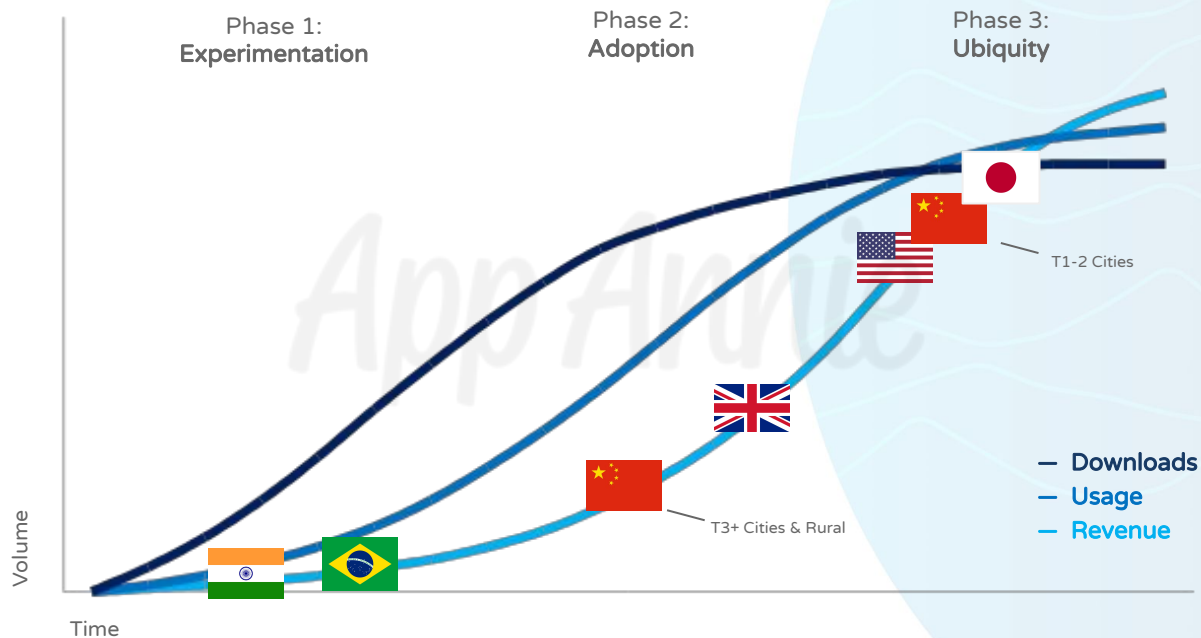
# The Future of Gaming and Global Trends

*App Annie*

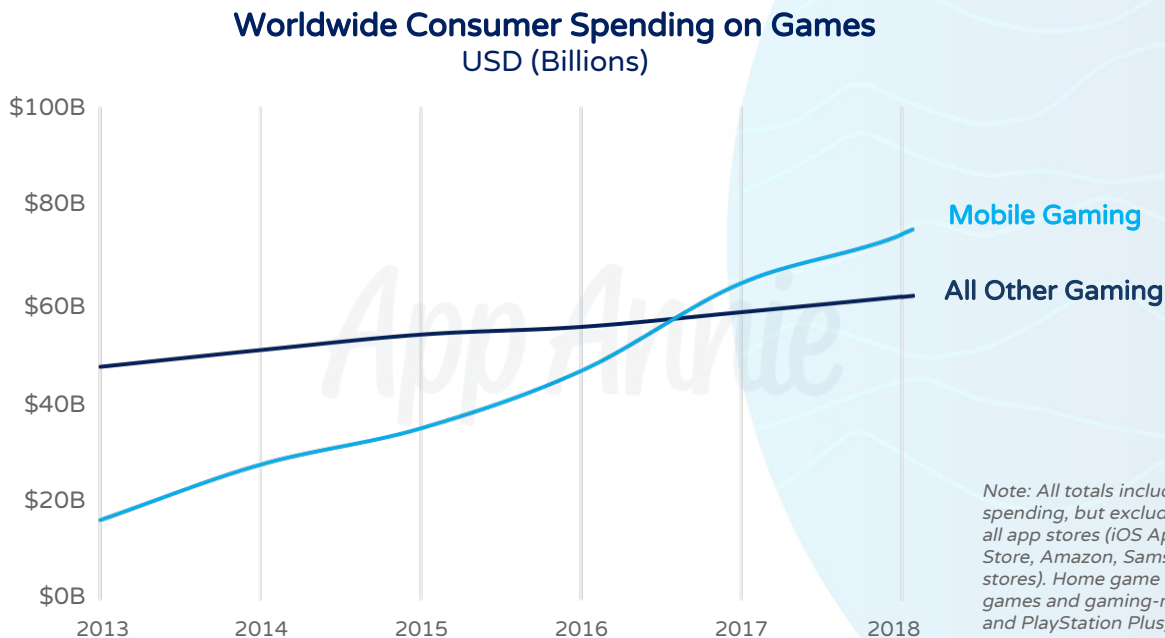
# What Happened in 2018?

*App Annie*

# Monetization opportunities increase as mobile markets mature



# Mobile continued to grow in 2018, expanding its lead over other gaming platforms



# New powerhouses in the Battle Royale and Hyper Casual genres

## Top Games of 2018:

Worldwide Combined iPhone and Android Phone Active Users

Rank	App	Company
1	 Anipop	Happy Elements
2	 Honour of Kings	Tencent
3	 Candy Crush Saga	Activision Blizzard
4	 Clash of Clans	Supercell
5	 PUBG: Exciting Battlefield	Tencent
6	 PUBG MOBILE	Tencent
7	 Clash Royale	Supercell
8	 Pokémon GO	Niantic
9	 Subway Surfers	Kiloo
10	 Helix Jump	Voodoo

# Considering downloads, the trend is even more apparent

## 2018 | Top Games by Downloads

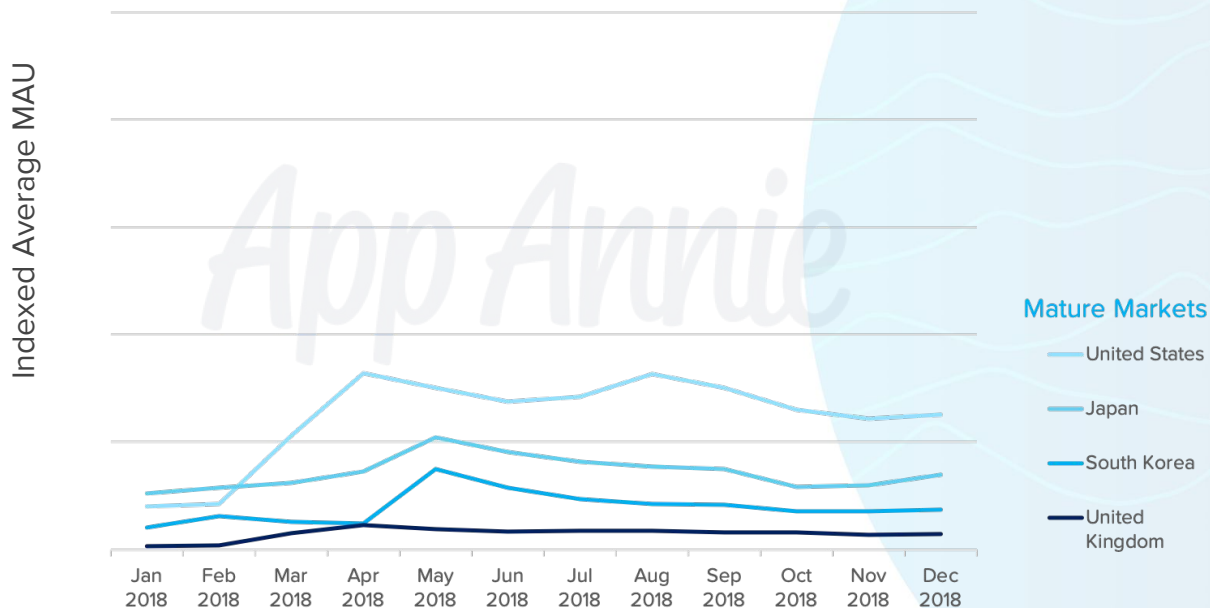
Brazil		Canada		China		France		Germany	
1	Free Fire	Helix Jump	Hole.io	PUBG: Exciting Battlefield	Honour of Kings	Helix Jump	Love Balls	Happy Glass	Love Balls
2	Helix Jump	PUBG MOBILE	Fortnite	QQ Speed	Pixel Art	Knife Hit	Pixel Art	PUBG MOBILE	
3	Subway Surfers	Rise Up		Identity V					
4	PUBG MOBILE								
5	Pou								
India		Japan		South Korea		UK		US	
1	Ludo King	Knives Out	PUBG MOBILE	Black Desert	Helix Jump	Happy Glass	Hole.io	Love Balls	Fortnite
2	Subway Surfers	Happy Glass	Helix Jump	Free Fire	Love Balls	Fortnite			
3	Temple Run 2	Identity V	Will Hero						
4	Candy Crush Saga	Disney Tsum Tsum							
5	Temple Run	Fill							

Battle Royale Hyper-Casual

Note: iOS and Google Play Stores

# MAU in Battle Royale Games Has Stabilised in Mature Markets

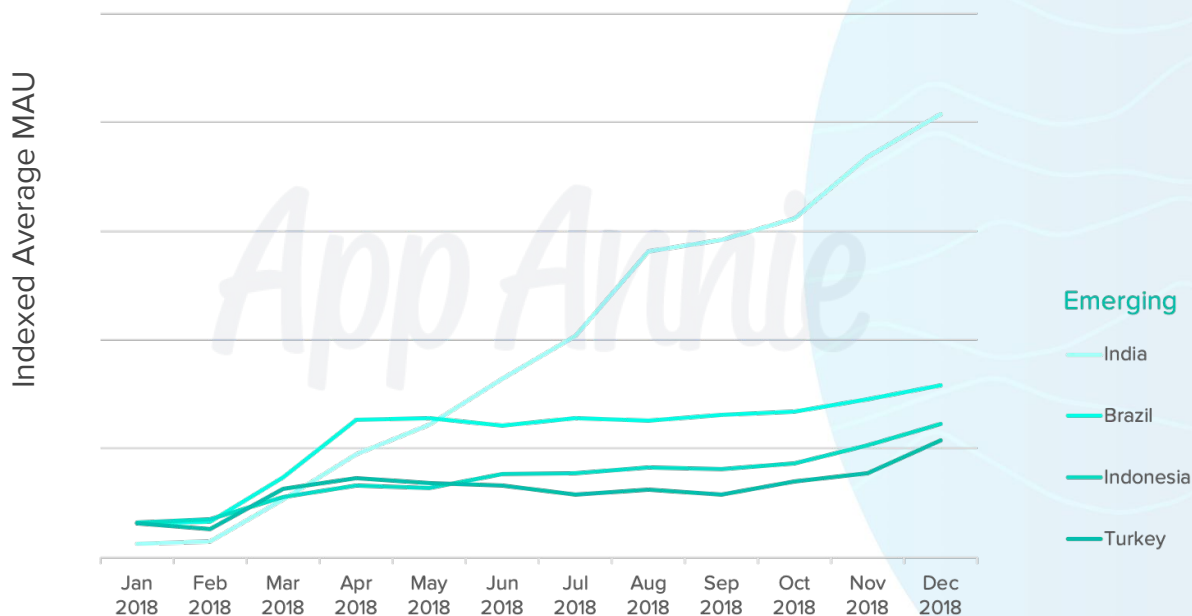
Average MAU in Battle Royale Apps in Selected Countries



Note: iPhone and Android  
Phone users combined

# Hardcore Gaming on Mobile is More Prevalent in Emerging Markets

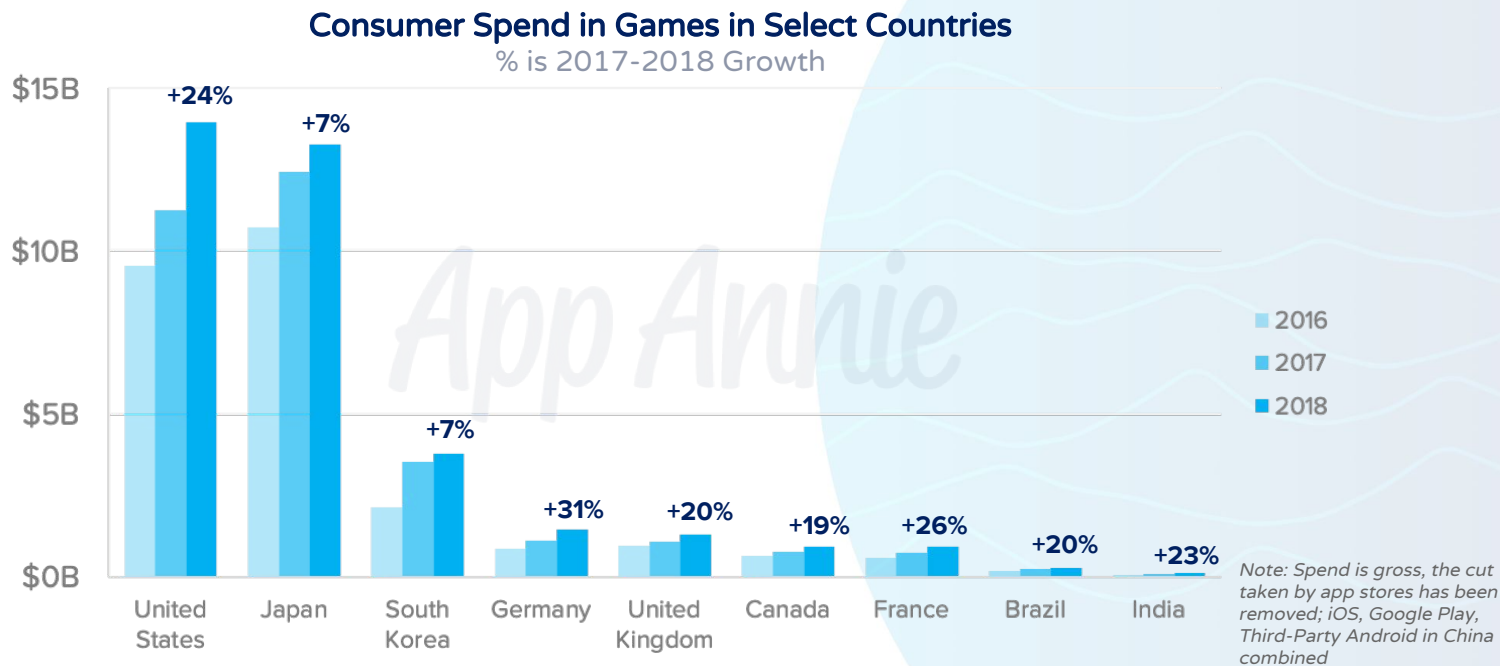
Average MAU in Battle Royale Apps in Selected Countries



Note: iPhone and Android Phone users combined

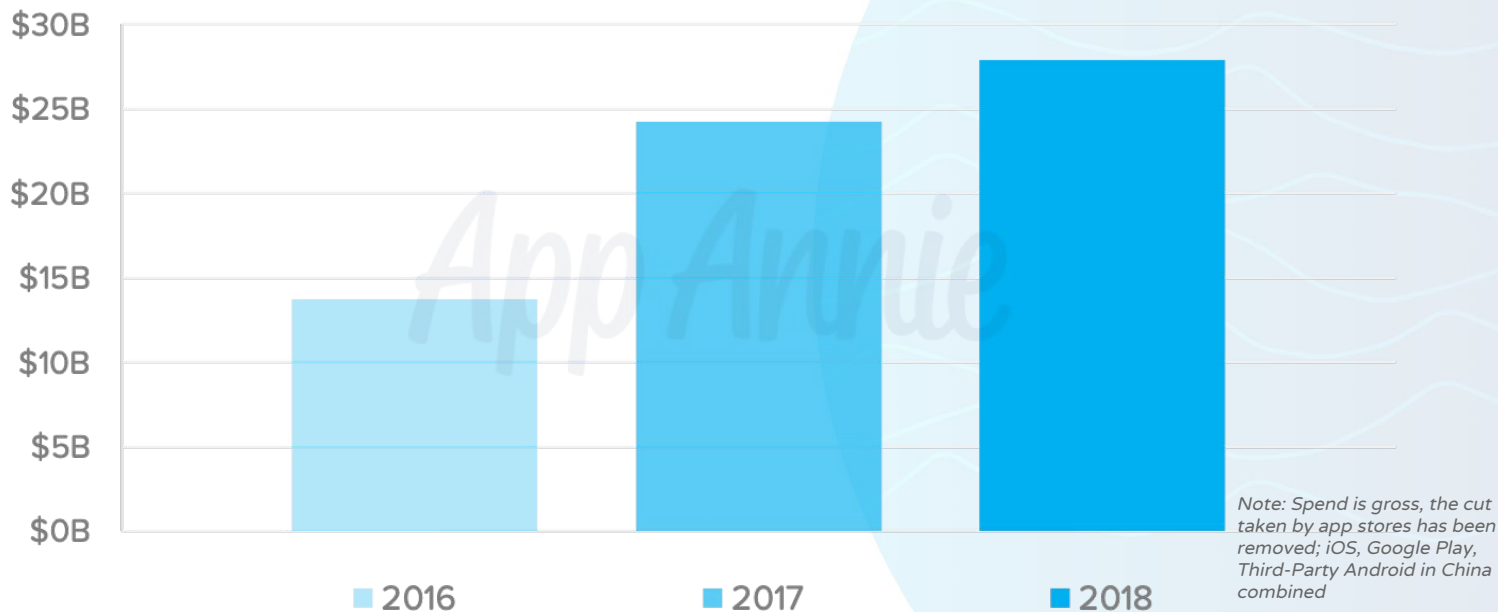


# Game revenue continues to grow globally



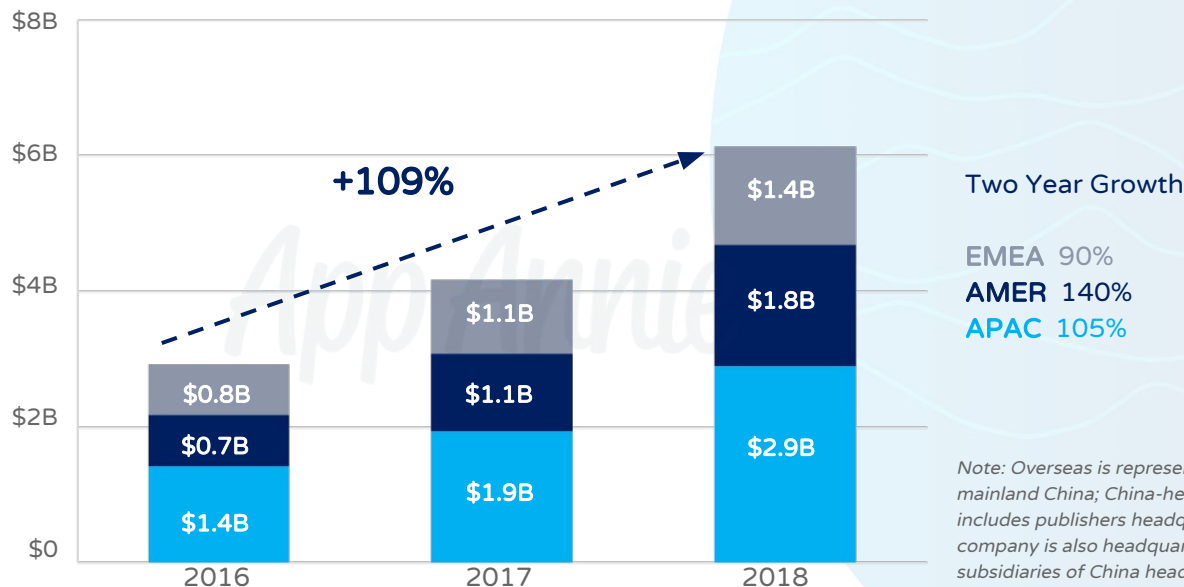
# Growth decelerates in China

Consumer Spend in Games in China



# China-headquartered publishers set their sights on overseas markets to accelerate growth

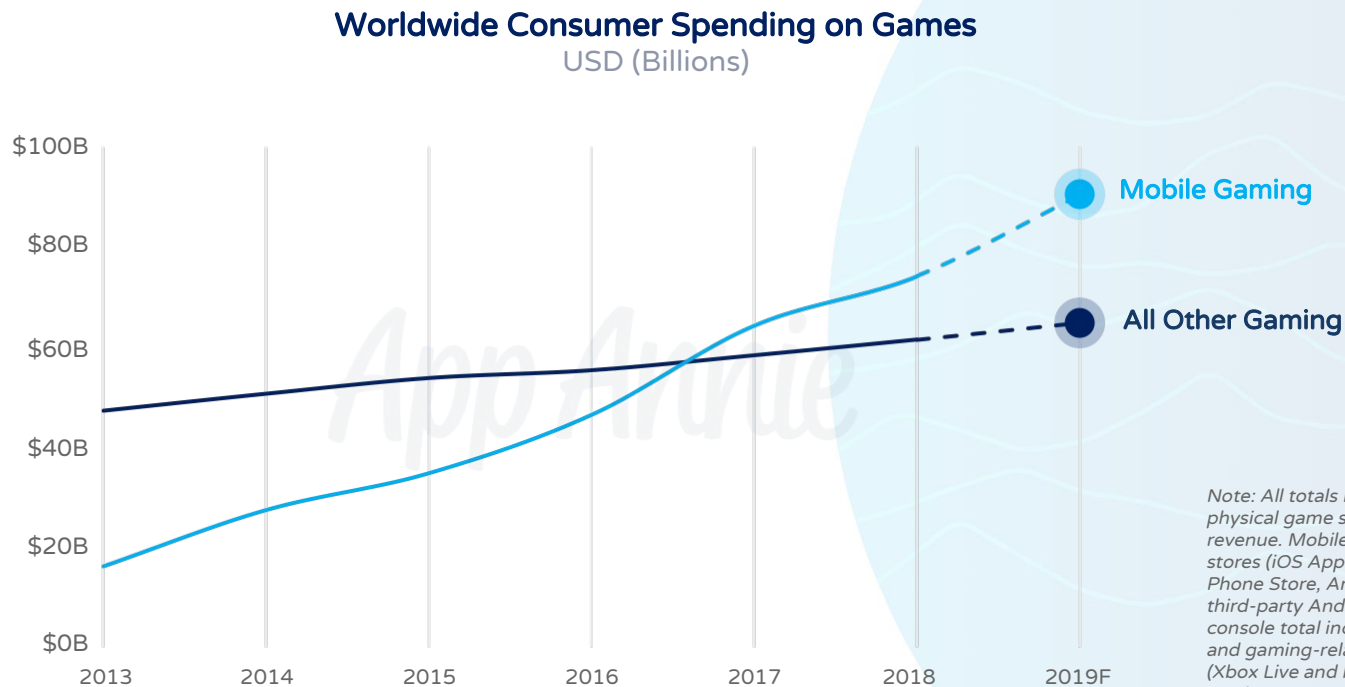
Overseas Consumer Spend on Games From  
China-Headquartered Publishers  
USD (Billions)



# Building a strategy for 2019

*App Annie*

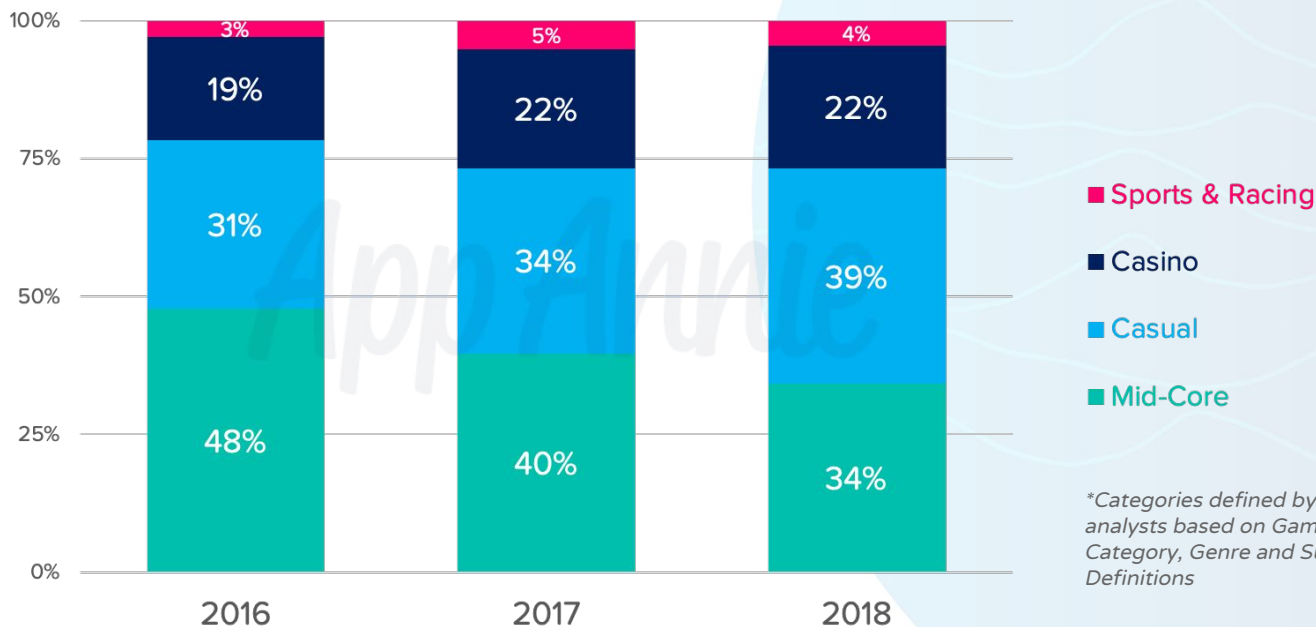
# Mobile will grow to 60% market share in 2019



# Casual games are increasingly lucrative

## Share of Total Revenue by Category\*

2016–2018, Analysis of Top 100 Games by Revenue in the United States

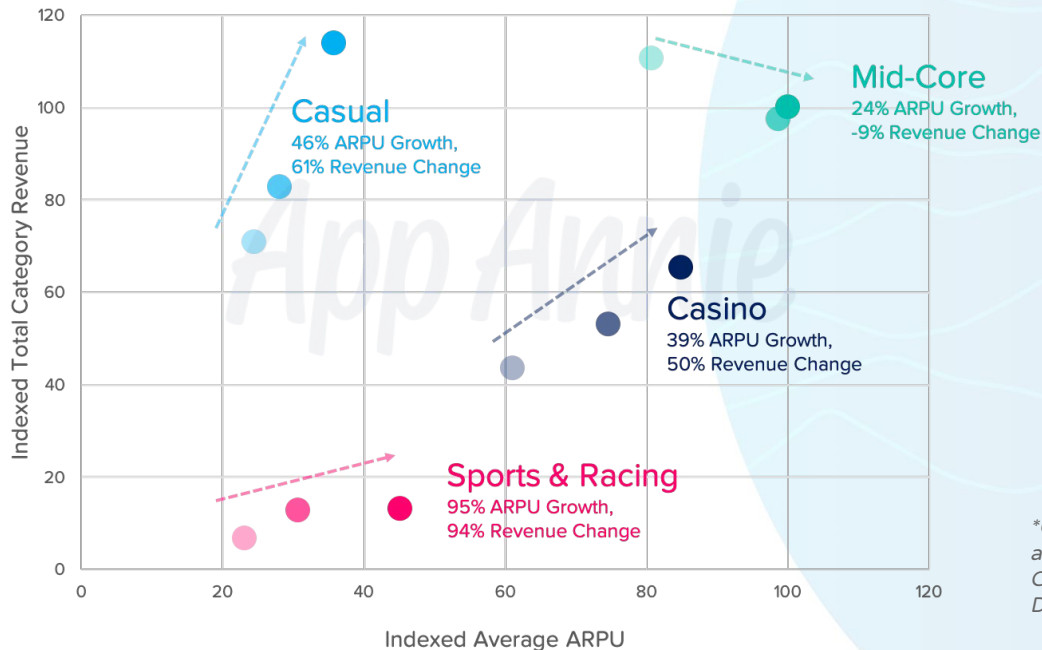


*\*Categories defined by App Annie analysts based on GameRefinery's Category, Genre and Sub-Genre Definitions*

# ARPU growth across categories — user are spending more

## Growth in Average ARPU & Total Revenue by Category\*

2016–2018, Analysis of Top 100 Games by Revenue in the United States

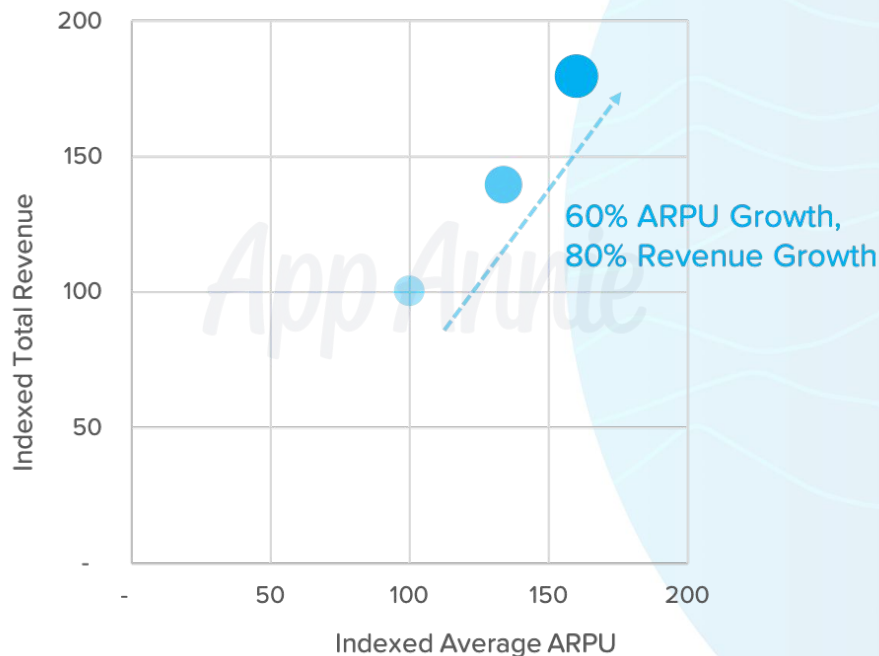


*\*Categories defined by App Annie analysts based on GameRefinery's Category, Genre and Sub-Genre Definitions*

# Casual Puzzle presents a rapidly expanding genre

## Growth in Average ARPU & Total Revenue for Casual Puzzle Games\*

2016–2018, in the United States



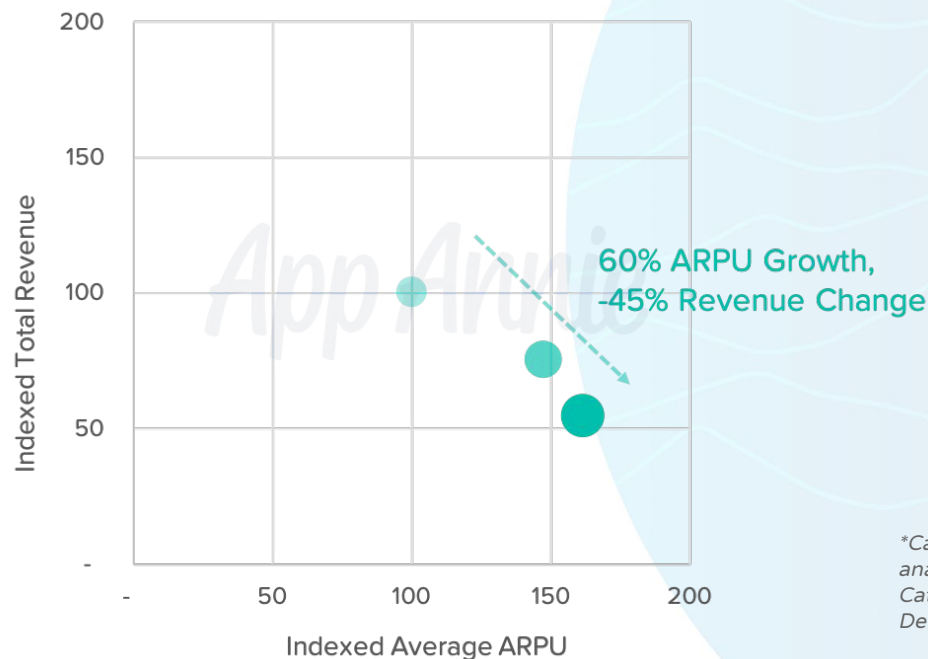
*\*Categories defined by App Annie analysts based on GameRefinery's Category, Genre and Sub-Genre Definitions*



# A gap has opened in the Mid-Core Strategy genre

## Growth in Average ARPU & Total Revenue for Mid-Core Strategy Games\*

2016–2018, in the United States

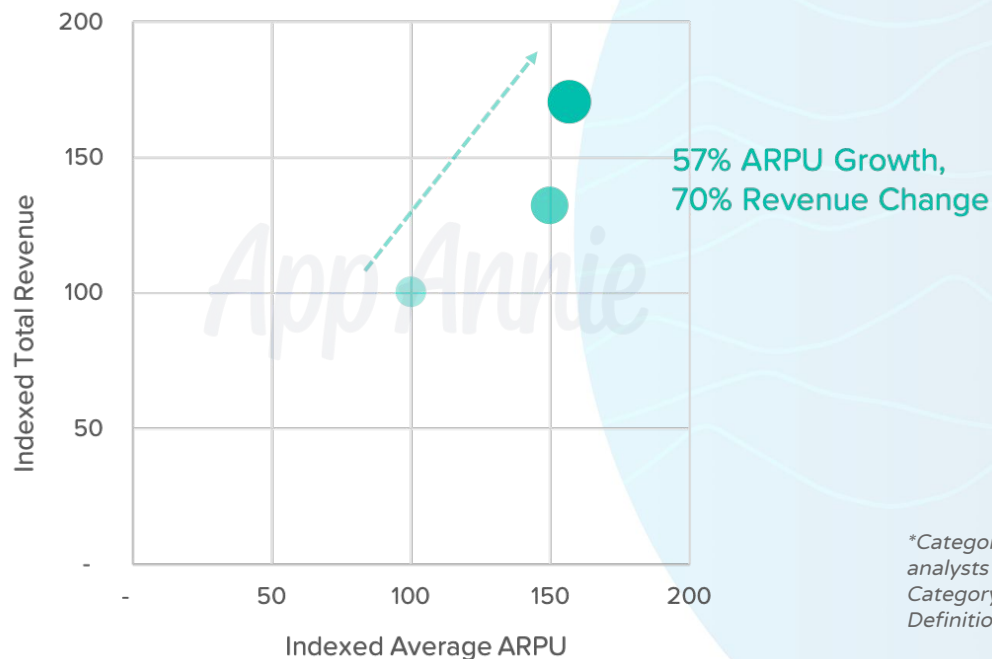


*\*Categories defined by App Annie analysts based on GameRefinery's Category, Genre and Sub-Genre Definitions*

# Mid-Core RPG genre is bucking the trend

## Growth in Average ARPU & Total Revenue for Mid-Core RPGs\*

2016–2018, in the United States



*\*Categories defined by App Annie analysts based on GameRefinery's Category, Genre and Sub-Genre Definitions*

# About App Annie

*App Annie*

# The Most Complete Offering to Confidently Grow Businesses Through Mobile



## DISCOVER

Understand the opportunity, competition and discover key drivers of success



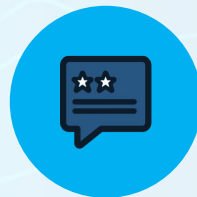
## STRATEGIZE

Develop a mobile strategy to drive market, Corp Dev or global objectives



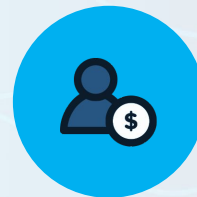
## ACQUIRE

Increase app visibility and optimize user acquisition



## ENGAGE

Better understand targeted users and drive deeper engagement



## MONETIZE

Accelerate revenue through mobile

# Our 1000+ Enterprise Customers Span Industries & the Globe



# Grow Your Games With Us

We deliver the most trusted mobile data and insights for your business to succeed in the global mobile gaming economy.

## App Annie Intelligence

Provides accurate mobile market data and insights for millions of businesses across the globe.

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## App Annie Connect

Gives you a full view of your mobile games performance. Consolidate all your app store, usage and advertising data in one unified dashboard.

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App Annie delivers the most trusted mobile data and insights for your business to succeed in the global mobile economy. Over 1 million registered members rely on App Annie to better understand the mobile market, their businesses and the opportunities around them. The company is headquartered in San Francisco with 15 global offices. App Annie has received \$157 million in financing from investors such as e.ventures, Greenspring Associates, Greycroft Partners, IDG Capital Partners, Institutional Venture Partners and Sequoia Capital.

Report methodology and updates are available [here](#).

*App Annie*