



Report

Southeast Asia: **Mobile Game Market** Insights **2025**



About Sensor Tower

Sensor Tower is the leading source of mobile app, digital advertising, retail media, and audience insights for the largest brands and app publishers across the globe.

With a mission to measure the world's digital economy, Sensor Tower's award-winning platform delivers unmatched visibility into the mobile app and digital ecosystem, empowering organizations to stay ahead of changing market dynamics and make informed, strategic decisions.

Founded in 2013, Sensor Tower's mobile app insights have helped marketers, app, and game developers demystify the mobile app landscape with visibility into usage, engagement, and paid acquisition strategies. Today, Sensor Tower's digital market insights platform has expanded to include Audience, Retail Media, and Pathmatics Digital Advertising Insights, helping brands and advertisers understand their competitor's advertising strategies and audiences across web, social, and mobile.











Press Inquiries : press-apac@sensortower.com

Business Inquiries : sales@sensortower.com



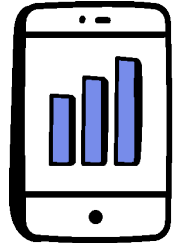
Sensor Tower | Our Customers

Top publishers trust Sensor Tower insights to grow their business.

L'ORÉAL		Google		 European Commission	Disney
petco	HERSHEY	amazon	ROVIO	DOORDASH	depop
Walmart		Microsoft	SEGA	dyson	SONY
 fetch REWARDS		Meta	OUTFIT7	Gett.	ByteDance
Alibaba	POPeYes	Tencent 腾讯	 WARNER BROS. GAMES	P&G	NBA
 CVS Health	 Domino's	Johnson & Johnson		Welch's	Revolut

Note: Top publishers by app store revenue | Source: Sensor Tower

Sensor Tower Solutions



Sensor Tower **App Performance Insights**

**For those who need visibility
into the mobile app ecosystem.**

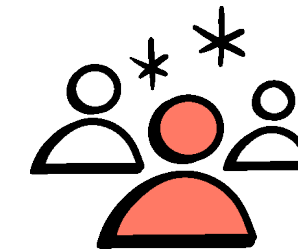
Enjoy insight into: app rankings, downloads, and revenue; active users, demographics, retention, sessions, and time spent; app ratings and reviews, keywords, search ads, and more.



Sensor Tower **App Advertising Insights**

**For those who need visibility
into paid user acquisition
strategies.**

Enjoy insight into: global and regional share of voice (SOV) across apps and the biggest mobile app ad networks, top advertisers, publishers, creatives, and more.



Sensor Tower **Audience Insights**

**For those who need visibility
into your existing, competitor,
and potential new audiences.**

Enjoy insight into: which apps consumers are actually interacting with (app engagement) AND which ads they're seeing (ad exposure).

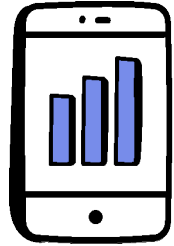


Sensor Tower **Pathmatics Digital Advertising Insights**

**For those who need visibility
into the digital ad ecosystem.**

Gain insight into: ads served, spend and impression estimates, SOV, and more across key channels, like: Facebook, Instagram, X (formerly Twitter), OTT, YouTube, display, video, and others.

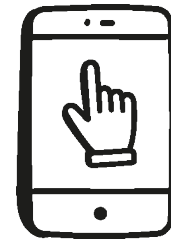
Sensor Tower Solutions



Sensor Tower **Gaming Insights**

For those who need the deepest look into the mobile gaming ecosystem.

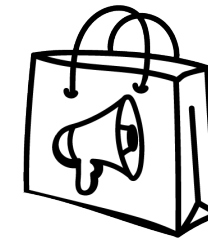
Enjoy insight into: downloads, revenue, RPD, and ARPDAU beyond the top-level category (Lifestyle & Puzzle) and can drill deeper into genres (Puzzle, Arcade, etc.) and sub-genres (Swap, Word, etc.).



Sensor Tower **Advanced Usage Insights**

For those who need the deepest look into app user engagement.

Enjoy insight into: sessions per user; time spent; time of day; days used per time period; new, retained, resurrected, and churned user trends; and cohort usage overlap.



Sensor Tower **Pathmatics Retail Media Insights**

For those who need industry-first insight into on- and off-site retail media network investments

Enjoy insight into: ad spend, media mix, share of wallet, impressions, and SOV for brands and products across retailers – gaining a coveted view into the co-branded digital ad ecosystem and retail media networks.

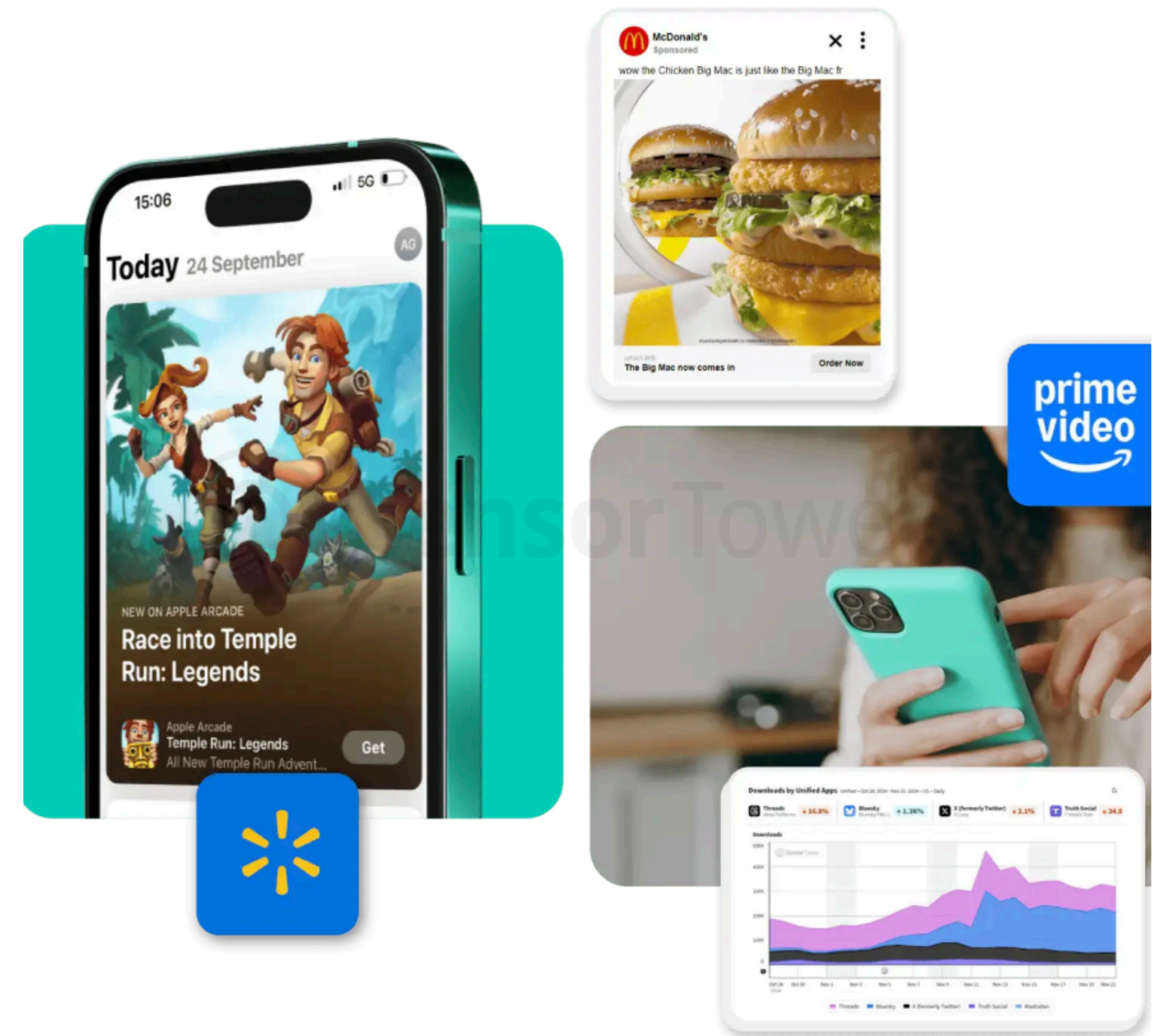
Sensor Tower

Executive Summary

This report provides an in-depth analysis of the App Store and Google Play mobile game markets in Southeast Asia in 2025, 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. Featuring a case study on *Mobile Legends: Bang Bang*, this report also helps you understand how leading games successfully cultivate long-standing engagement within 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.



Sensor Tower

Data & Methodology

Sensor Tower’s **Pathmatics** empowers you to uncover insights into the digital advertising ecosystem, minimize ineffective ad spend, and enhance the precision of your advertising campaigns. With Pathmatics, you gain visibility into the digital advertising landscapes across markets including the United States, Australia, Brazil, Canada, France, Germany, Italy, Japan, Mexico, New Zealand, Spain, and the United Kingdom. Pathmatics provides comprehensive estimates on ad placements, spending, impressions, and share of voice (SOV), as well as in-depth analysis of brands' advertising strategies on platforms like Facebook, Instagram, X (formerly Twitter), YouTube, and TikTok, across formats such as display banners, videos, mobile, and OTT.

Pathmatics collects digital ad samples from the web and utilizes statistical sampling methods to estimate the impressions, cost-per-thousand impressions (CPM), and expenditure associated with each creative.

Digital Advertising Channels Supported by Pathmatics Across Markets													
	United States	United Kingdom	Canada	Australia	New Zealand	Germany	Spain	Italy	France	Brazil	Mexico	Japan	South Korea
Facebook	•	•	•	•	•	•	•	•	•	•	•	•	•
Instagram	•	•	•	•	•	•	•	•	•	•	•	•	•
YouTube	•	•	•	•	•	•		•	•		•	•	
TikTok	•	•	•	•		•	•	•	•	•	•	•	
Snapchat	•	•	•	•		•	•	•	•				
X	•	•										•	
Linkedin	•	•	•			•			•				
Pinterest	•	•	•			•		•	•				
Reddit	•	•	•	•		•		•	•				
OTT	•												
Desktop Video	•	•	•	•	•	•							
Desktop Display	•	•	•	•	•	•							
Mobile Video	•	•	•	•	•	•							
Mobile Display	•	•	•	•	•	•							

Agenda

Executive Summary	06
Overview of the Southeast Asian Mobile Game Market	09
SEA Country Spotlights: Top Genres and Games	14
Indonesia	15
Thailand	17
Vietnam	19
Philippines	21
Case Study : Mobile Legends Bang Bang	23
Southeast Asia Publishers On the Global Stage	27
Conclusion	33

Overview of the Southeast Asian Mobile Game Market





Southeast Asia: A Mobile Gaming Powerhouse in Downloads with Significant Monetization Headroom

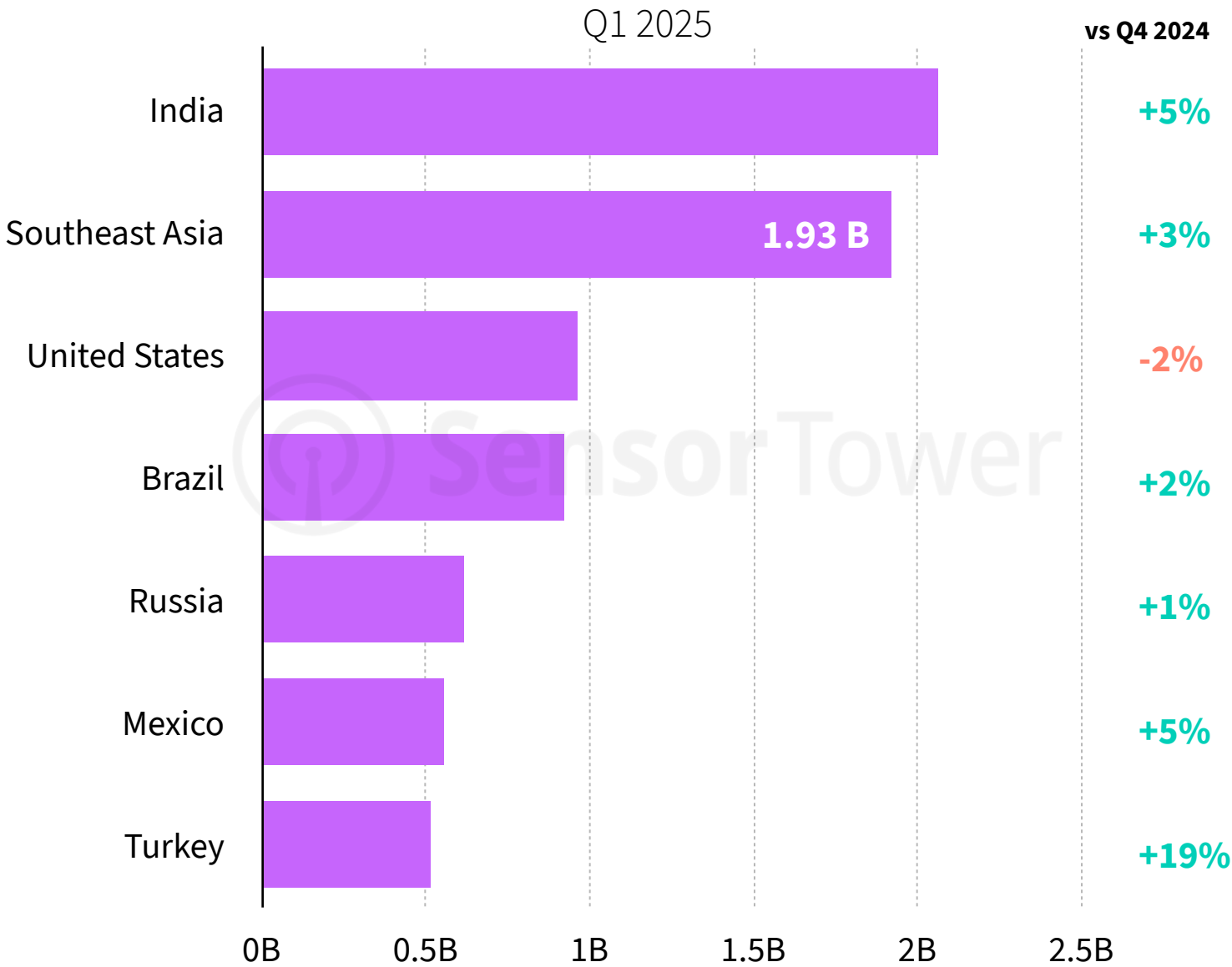
Data Source: Sensor Tower App Performance Insights.

Notes: Sensor Tower’s data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

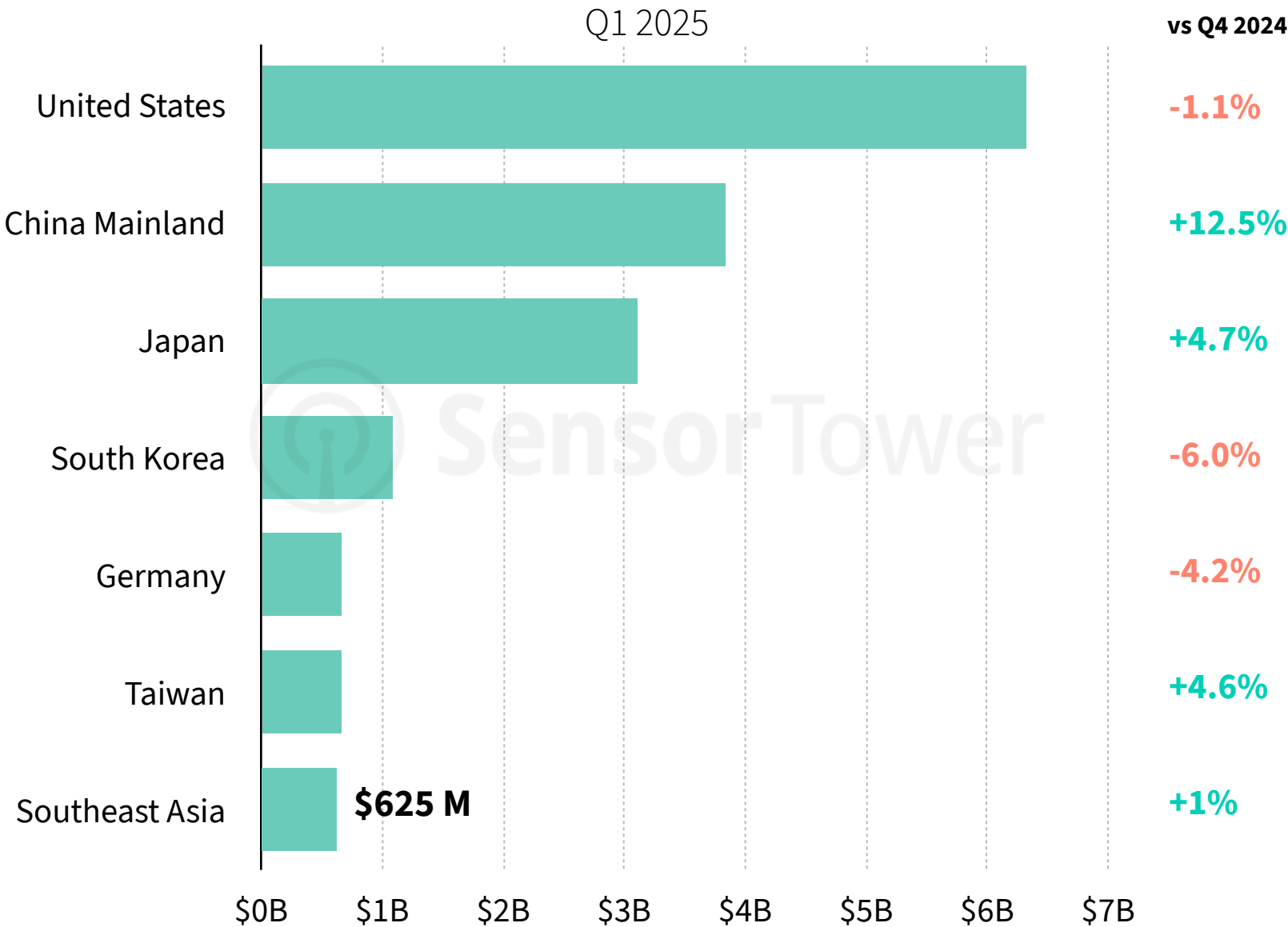
Southeast Asia stands as a pivotal region in the global mobile gaming industry, presenting significant opportunities for developers and publishers. Collectively, the region ranked #2 globally for mobile game downloads in Q1 2025, hitting 1.93 billion new installs—a 3% quarter-over-quarter rise from Q4 2024. This underscores the region's highly engaged and expanding player base, avid for new mobile gaming content and experiences.

Despite ranking #7th globally in Q1 2025 with \$625M in IAP revenue, Southeast Asia nonetheless demonstrates strong monetization potential. Its large gaming community, improved digital payments, and rising smartphone adoption are key drivers indicating untapped revenue. This strong download momentum should drive higher player spending, positioning the region for continued revenue growth.

Global Mobile Game Markets by Downloads



Global Mobile Game Markets by IAP Revenue

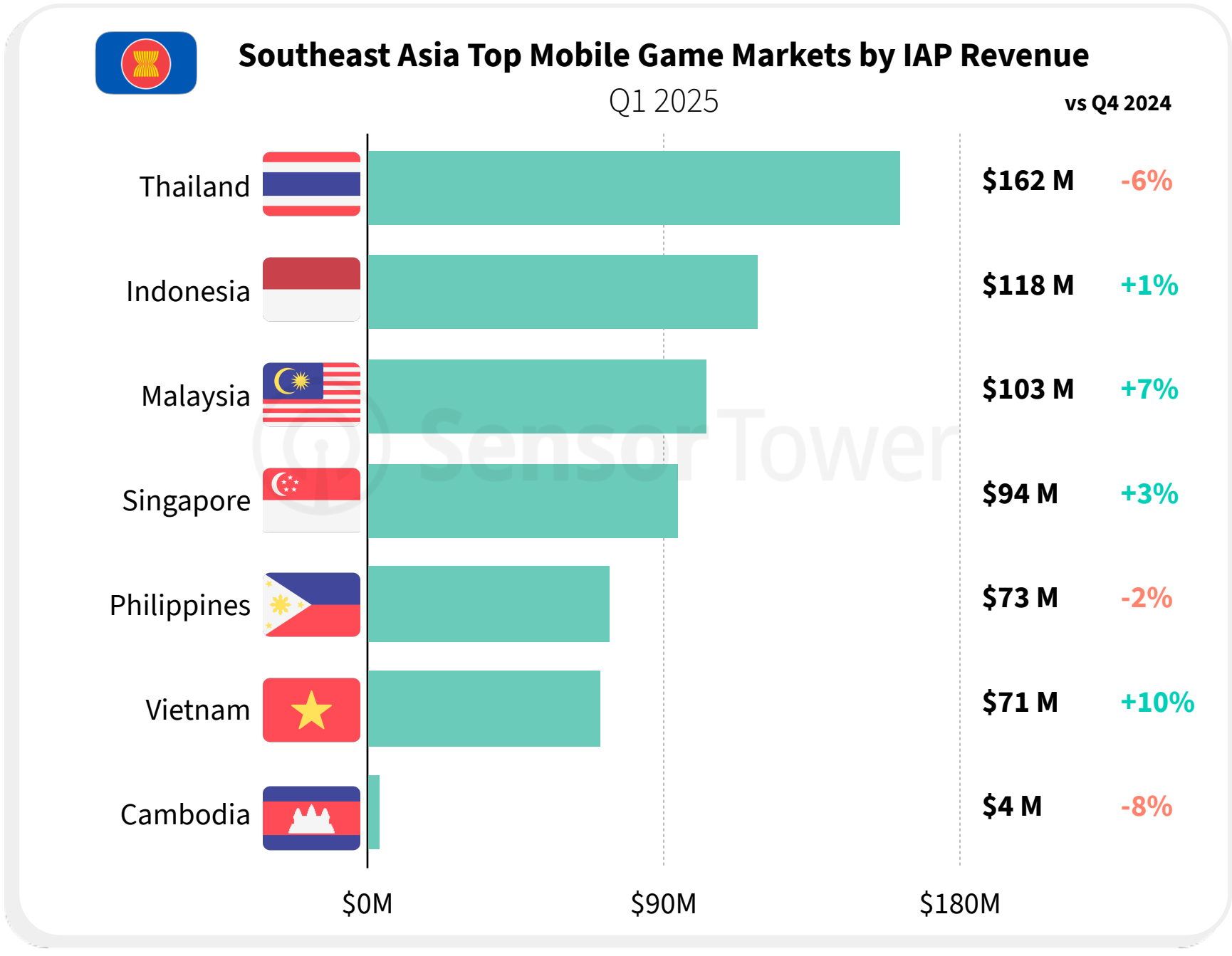
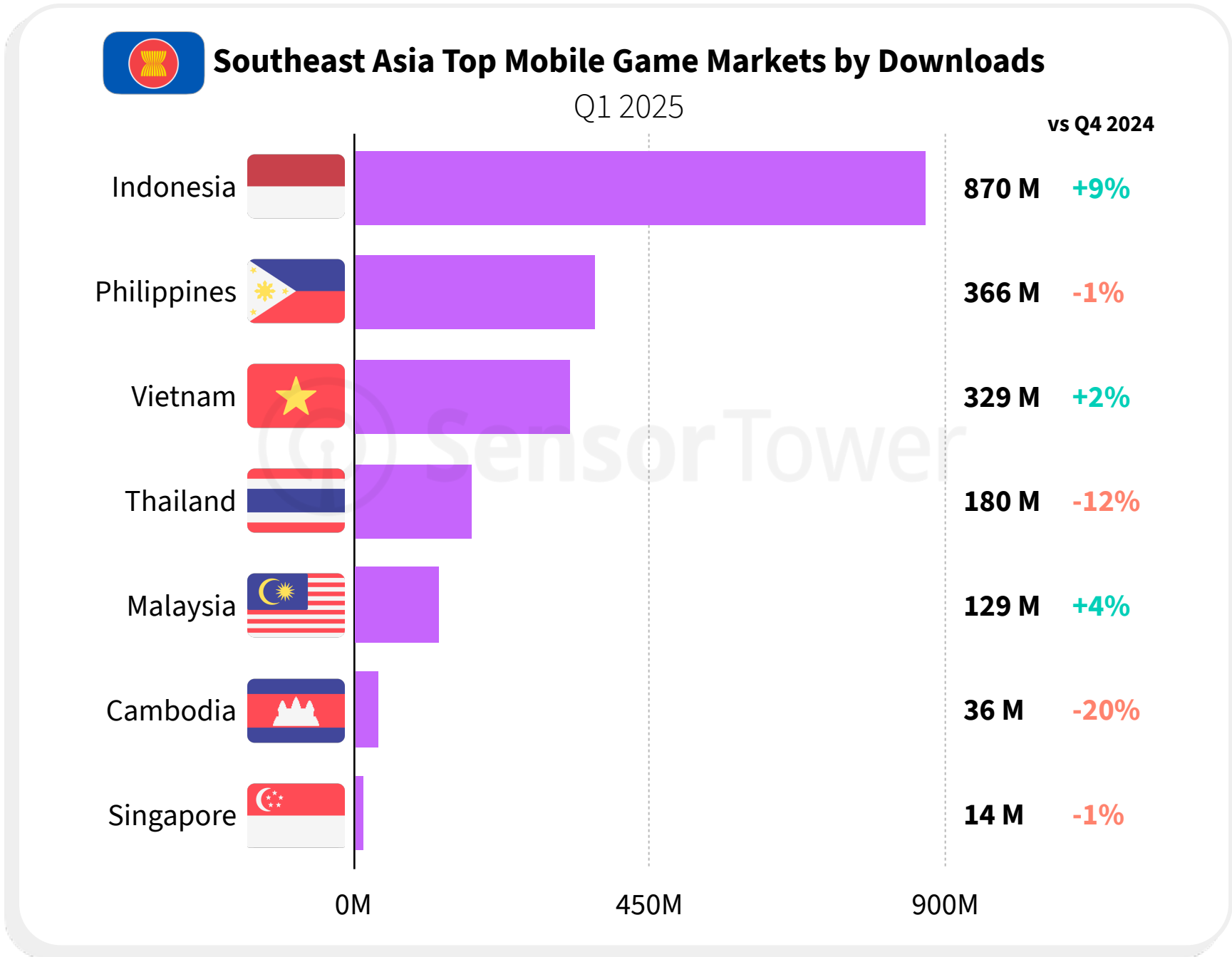


SEA Mobile Gaming: Indonesia Leads Downloads, Thailand Leads IAP Revenue

Data Source: Sensor Tower App Performance Insights.
Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Indonesia remains the dominant force in Southeast Asian mobile game downloads with 870 million in Q1 2025, exhibiting a strong 9% growth from the previous quarter. Following are the Philippines and Vietnam with 366M and 329M downloads respectively. This reaffirms the critical role of Indonesia's large user population in driving mobile game installations across Southeast Asia.

Thailand leads SEA in mobile game revenue (\$162M) partly due to its strong digital payment infrastructure and greater cultural acceptance of in-app spending for upgrades and social play. This, alongside effective localization, drives higher average user spending despite a smaller population than bigger markets such as Indonesia and Philippines.



Top Gaming Subgenres in Southeast Asia: Arcade and Simulators Lead Downloads, while Strategy, RPG and Shooters Lead Revenue

Data Source: Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.

Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

In Southeast Asia, casual genres such as Arcade and Simulation attract vast downloads thanks to their straightforward gameplay. Conversely, deeper genres like Strategy, Shooters, and especially social-driven RPGs—which thrive on collaborative or competitive interaction—command the bulk of IAP revenue. These games, particularly RPGs with integral community features and deep personalisation, effectively convert prolonged player commitment into revenue, as their inherent social dynamics drive both user acquisition and spending.



***Mobile Legends* Extends Revenue Reign in SEA Q1 2025 as Sports Titles Gain Spending Power; Downloads Driven by a Diverse Mix of Casual and Core Hits**

Data Source: Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.

Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

While *Garena Free Fire* led downloads and *Mobile Legends: Bang Bang* dominated revenue and growth in Q1 2025, newer titles using popular IP gained notable traction. Moonton's *Magic Chess: Go Go*, for instance, surged to #2 in download growth. Likewise, the new *Ragnarok M: Classic* quickly hit the top 4 for revenue growth, underscoring franchise power in a dynamic market that also saw diverse casual and competitive successes.



Top 10 Mobile Games in Southeast Asia

Unified • Jan 1, 2025 - Mar 31, 2025

Downloads

vs Q4 2024

1		Garena Free Fire Garena Games Online	=
2		Block Blast! HungryStudio	▲
3		Roblox Roblox Corporation	=
4		Mobile Legends: Bang Bang Moonton	▼
5		Magic Chess: Go Go Moonton Games	▲
6		Super Bear Adventure Earthkwak Games	▲
7		Stickman Party 234 MiniGames PlayMax Game Studio	=
8		Worms Zone .io - Hungry Snake Azur Interactive Games	▲
9		Last War:Survival FUNFLY	▲
10		Subway Surfers Miniclip.com	▼

Downloads Growth

vs Q4 2024

1		Block Blast! HungryStudio	▲
2		Magic Chess: Go Go Moonton Games	▲
3		Super Bear Adventure Earthkwak Games	▲
4		Garena Free Fire Garena Games Online	=
5		Dalgona Candy Cookie Games LIVDG LIMITED	▲▲
6		Roblox Roblox Corporation	=
7		Cat Chaos: Prankster Mirai Games	▲
8		Survival Escape: Prison Game H2T GLOBAL	▲▲
9		FPS Strike Ops : Modern Arena FPS Shooter	▲▲
10		Trở Về Tuổi Thơ COROCHTI	NEW

Revenue

vs Q4 2024

1		Mobile Legends: Bang Bang Moonton Games	▲
2		eFootball™ Konami	▼
3		Last War:Survival FUNFLY	▲
4		Garena Free Fire Garena Games Online	▲
5		Roblox Roblox Corporation	▼
6		EA SPORTS FC™ Mobile Soccer Electronic Arts	▼
7		Coin Master Moon Active	=
8		Whiteout Survival Century Games	=
9		Candy Crush Saga Microsoft Corporation	=
10		PUBG MOBILE Tencent	▲

Revenue Growth

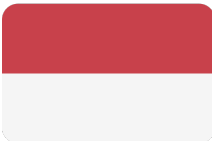
vs Q4 2024

1		Mobile Legends: Bang Bang Moonton Games	▲
2		Last War:Survival FUNFLY	▲
3		Garena Free Fire Garena Games Online	▲
4		Ragnarok M: Classic GungHo Online Entertainment, Inc.	NEW
5		Dark War Survival Florere Game	▲
6		Call of Duty®: Mobile Microsoft Corporation	▲
7		PUBG MOBILE Tencent	▲
8		Apex Girl Tap4Fun	▲
9		TopHeroes River Game HK	▲
10		Coin Master Moon Active	=



SEA Country Spotlights

Top Genres and Games

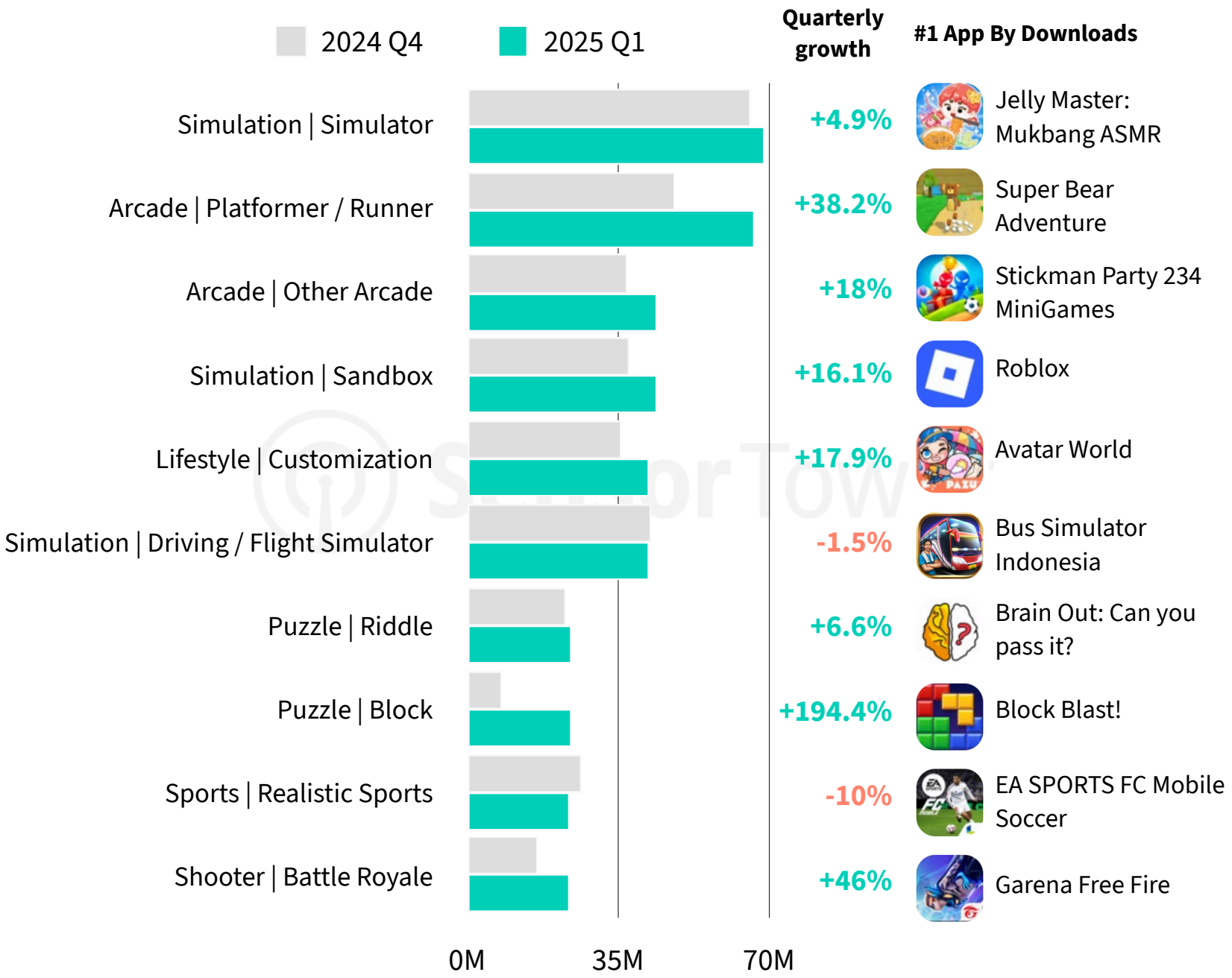


Indonesia's Mobile Game Market Q1 2025: Simulation & Arcade Top Downloads, MOBA/Strategy Lead Revenue, While Shooters Surge in Growth

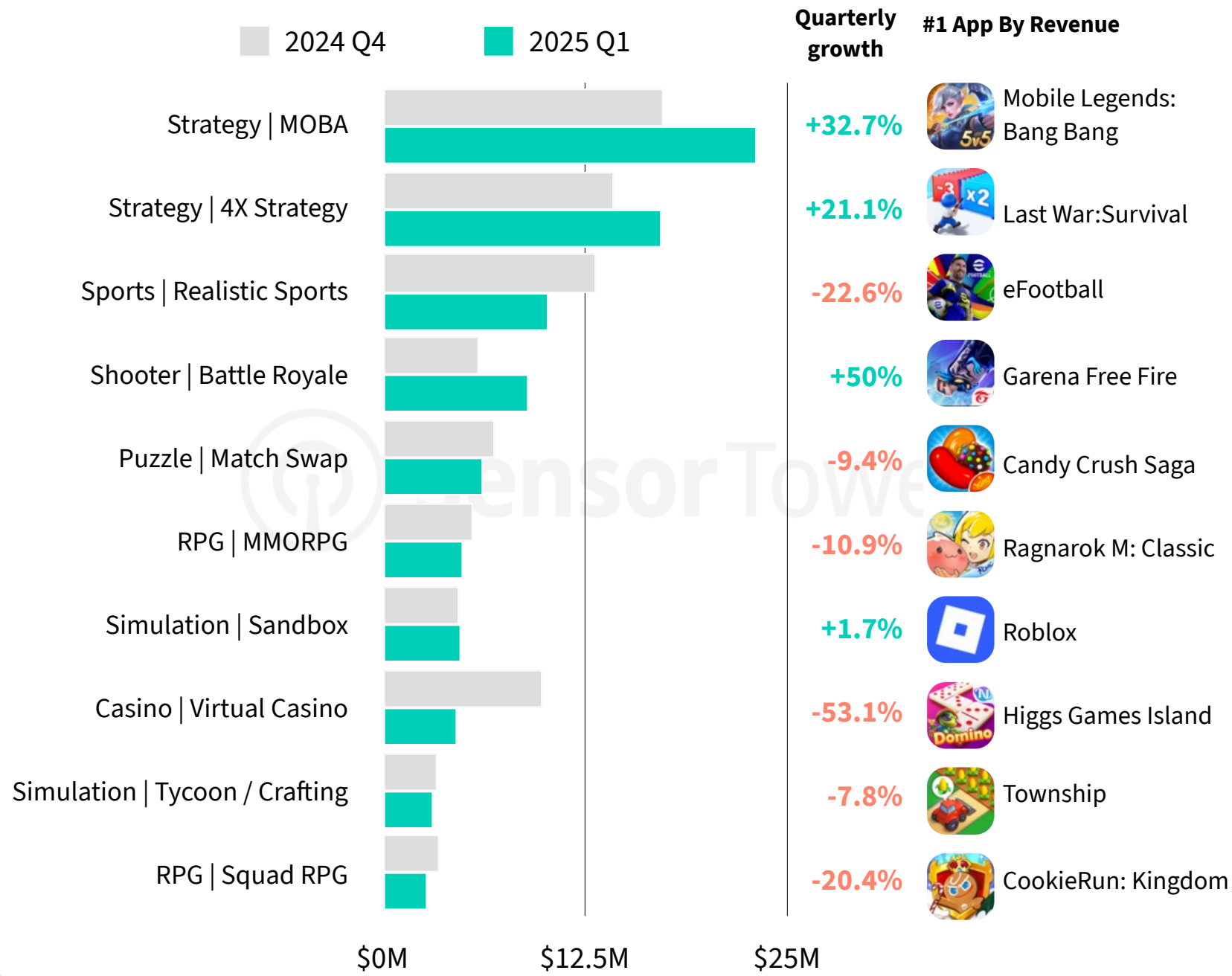
Data Source: Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.
Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Simulator (led by *Jelly Master: Mukbang ASMR*) and Arcade Platformer/Runner (led by *Super Bear Adventure*) ranked as the top two subgenres by downloads in Indonesia, signaling strong appetite for fresh casual titles. Strategy/MOBA, spearheaded by *Mobile Legends: Bang Bang*, dominated Q1 revenue. Furthermore, Shooter/Battle Royale games, led by *Garena Free Fire*, showed exceptional momentum—revenue +50% QoQ and downloads +46% QoQ —its success driven by competitive and social interplay that deepens engagement and boosts monetization.

Indonesia Top Subgenre by Downloads



Indonesia Top Subgenre by Revenue



Mobile Legends & Free Fire Maintain Lead in Indonesia, But Newcomers like Magic Chess: Go Go & Last War:Survival Signal Market Shift in Q1 2025

Data Source: Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.
Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Hyper-casual puzzle *Block Blast!* topped download growth, underscoring new accessible games' acquisition power. For revenue growth, newer strategy/survival entries like *Last War:Survival* and other emerging titles such as *Magic Chess: Go Go* and popular RPG *Ragnarok M: Classic* showed strong monetization, indicating a dynamic market receptive to fresh, engaging content.






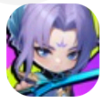

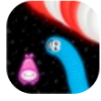




Top 10 Mobile Games in Indonesia

Unified • Jan 1, 2025 - Mar 31, 2025











Downloads

vs Q4 2024

1		Garena Free Fire Garena Games Online	▲
2		Block Blast! Hungry Studio	▲
3		Mobile Legends: Bang Bang Moonton Games	▼
4		Roblox Roblox Corporation	▼
5		Super Bear Adventure Earthkwak Games	▲
6		Magic Chess: Go Go Moonton Games	NEW
7		Stickman Party 234 MiniGames PlayMax Game Studio	=
8		Worms Zone .io - Hungry Snake Azur Interactive Games	▲
9		SAKURA School Simulator Garusoft	▲
10		Dalgona Candy Cookie Games LIVDG	▲▲

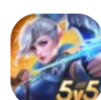






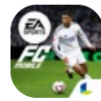


Downloads Growth

vs Q4 2024

1		Block Blast! Hungry Studio	▲
2		Magic Chess: Go Go Moonton Games	NEW
3		Super Bear Adventure Earthkwak Games	▲
4		Garena Free Fire Garena Games Online	▲
5		Roblox Roblox Corporation	▼
6		Dalgona Candy Cookie Games LIVDG	▲▲
7		Cat Chaos: Prankster Mirai Games	▲
8		ColorBlock : Combo Blast Flyyes	▲
9		Survival Escape: Prison Game H2T GLOBAL	▲▲
10		Craft Block World Building SuroboyoStar	NEW






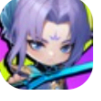

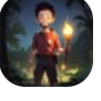
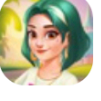
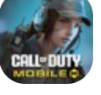
Revenue

vs Q4 2024

1		Mobile Legends: Bang Bang Moonton Games	=
2		Garena Free Fire Garena Games Online	▲
3		Last War:Survival FUNFLY	▲
4		eFootball Konami	▼
5		Higgs Games Island PokerCity	▼
6		Roblox Roblox Corporation	▼
7		Whiteout Survival Century Games	=
8		EA SPORTS FC Mobile Soccer Electronic Arts	=
9		Candy Crush Saga Microsoft Corporation	=
10		Clash of Clans Supercell	=

Revenue Growth

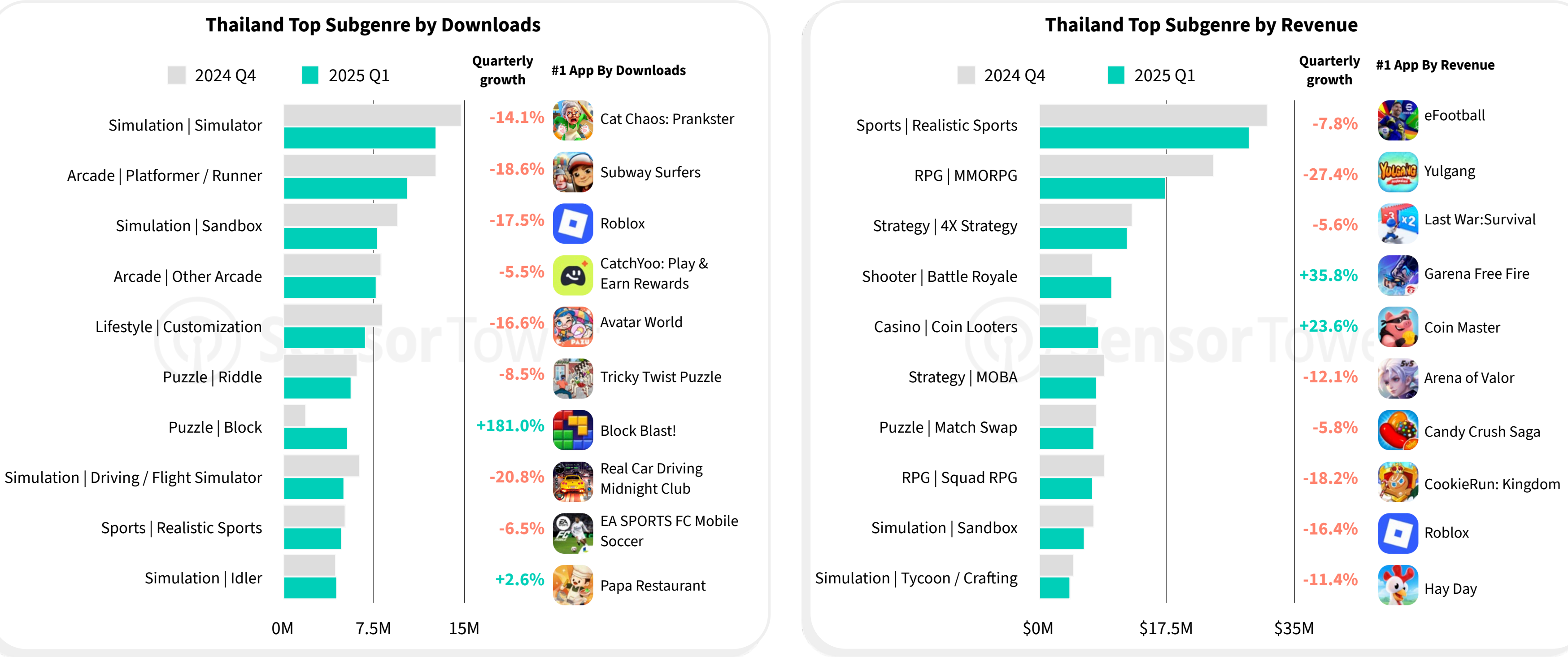
vs Q4 2024

1		Mobile Legends: Bang Bang Moonton Games	=
2		Last War:Survival FUNFLY	▲
3		Garena Free Fire Garena Games Online	▲
4		Last Z: Survival Shooter Florere Game	▲
5		Ragnarok M: Classic GungHo Online Entertainment	NEW
6		Magic Chess: Go Go Moonton Games	▲▲
7		PUBG MOBILE Tencent	▲
8		Dark War Survival Florere Game	▲
9		Gossip Harbor: Merge & Story Microfun	▲
10		Call of Duty®: Mobile Microsoft Corporation	▲

Thailand Q1 2025: Realistic Sports Leads Revenue, Block Puzzle Surges Amidst Shifting Download Trends

Data Source: Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.
Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Simulators (led by *Cat Chaos: Prankster*) topped mobile downloads despite the category's overall decline, while *Block Blast!* powered an explosive +181% QoQ surge for Puzzle Block downloads. Thailand's unique revenue landscape was defined by Realistic Sports (spearheaded by *eFootball*) ranking as the quarter's top-grossing subgenre. Significant revenue growth also came from Battle Royale (led by *Garena Free Fire*), at 35.8% QoQ growth and Coin Looters (led by *Coin Master*), at 23.6% QoQ growth.



Thailand Q1 2025: *Block Blast!* Dominates Downloads, Sports Games Lead Revenue, While *Free Fire* and *Ragnarok M: Classic* Spearhead Revenue Growth

Data Source: Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.
Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.











Beyond *Block Blast!*'s Q1 2025 download lead in Thailand, growth charts also featured new hyper-casual and simulation titles like *Go Go Samkok* and *Papa Restaurant*, signaling appetite for fresh, accessible content. While Sports games led spending, Thailand's revenue landscape remained diverse: *Arena of Valor* (MOBA), *Coin Master* (Coin Looter), and *Yulgang* (MMORPG) titles were also top earners, showing varied monetization paths.



Top 10 Mobile Games in Thailand Unified • Jan 1, 2025 - Mar 31, 2025











Downloads

vs Q4 2024

1		Block Blast! Hungry Studio	▲
2		Garena Free Fire Garena Games Online	▼
3		Roblox Roblox Corporation	=
4		Arena of Valor Garena Games Online	=
5		EA SPORTS FC Mobile Soccer Electronic Arts	▲
6		Subway Surfers Miniclip.com	▼
7		Coin Master Moon Active	▲
8		Cat Chaos: Prankster Mirai Games	▲
9		PUBG MOBILE Tencent	▲
10		Mobile Legends: Bang Bang Moonton Games	▲











Downloads Growth

vs Q4 2024

1		Block Blast! Hungry Studio	▲
2		ColorBlock : Combo Blast Flyyes	▲
3		Go Go Samkok Joy Net Games	NEW
4		Cat Chaos: Prankster Mirai Games	▲
5		Dalgona Candy Cookie Games LIVDG	▲
6		Satiszone: Perfect ASMR Tidy Sonat Technology	▲
7		Tricky Twist Puzzle ABI Games Studio	▲
8		Ragnarok M: Classic GungHo Online Entertainment	NEW
9		Papa Restaurant LEYO	NEW
10		Tidy Master - Satisfel ASMR PixOn Games	▲











Revenue

vs Q4 2024

1		eFootball Konami	=
2		EA SPORTS FC Mobile Soccer Electronic Arts	=
3		Garena Free Fire Garena Games Online	▲
4		Coin Master Moon Active	=
5		Arena of Valor Garena Games Online	▼
6		Roblox Roblox Corporation	▼
7		Last War:Survival FUNFLY	▲
8		Yulgang: จุติยุทธภพเลือดใหม่ gamelovin	▼
9		Candy Crush Saga Microsoft Corporation	▲
10		Whiteout Survival Century Games	▲

Revenue Growth

vs Q4 2024

1		Garena Free Fire Garena Games Online	▲
2		Ragnarok M: Classic GungHo Online Entertainment	NEW
3		Coin Master Moon Active	=
4		TFT: Teamfight Tactics Tencent	▲
5		Slack Off Survivor Dodjoy HK	▲
6		Dragoon Academy NewCubegames	NEW
7		Dark War Survival Florere Game	▲
8		Mobile Legends: Bang Bang Moonton Games	▲
9		CookieRun: Kingdom Devsisters	▲
10		Love and Deepspace Paper Games	▲

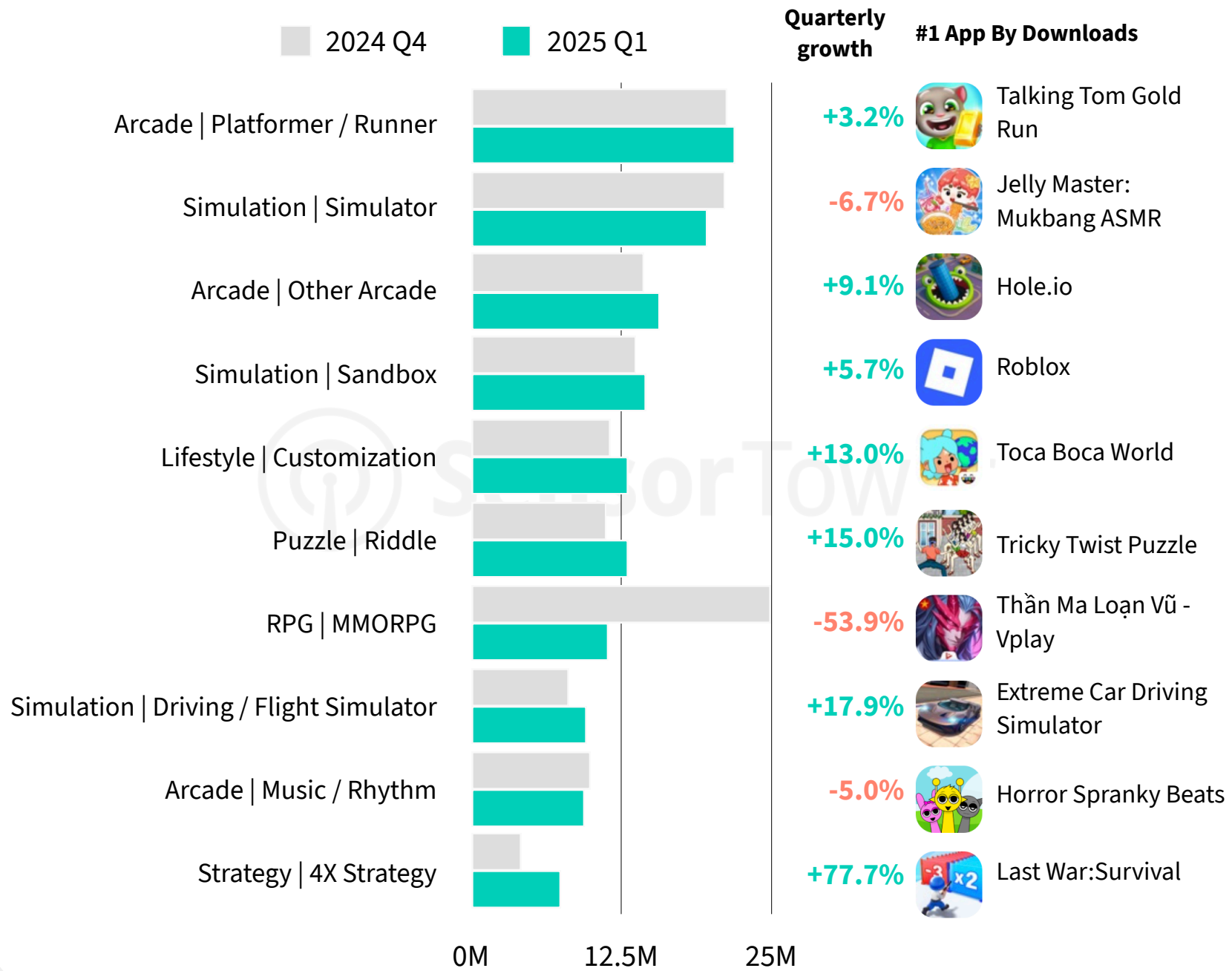


Vietnam's Subgenre Landscape Q1 2025: 4X Strategy Dominates Growth, Puzzle & Casual Downloads Thrive, Core Genres Expand Revenue

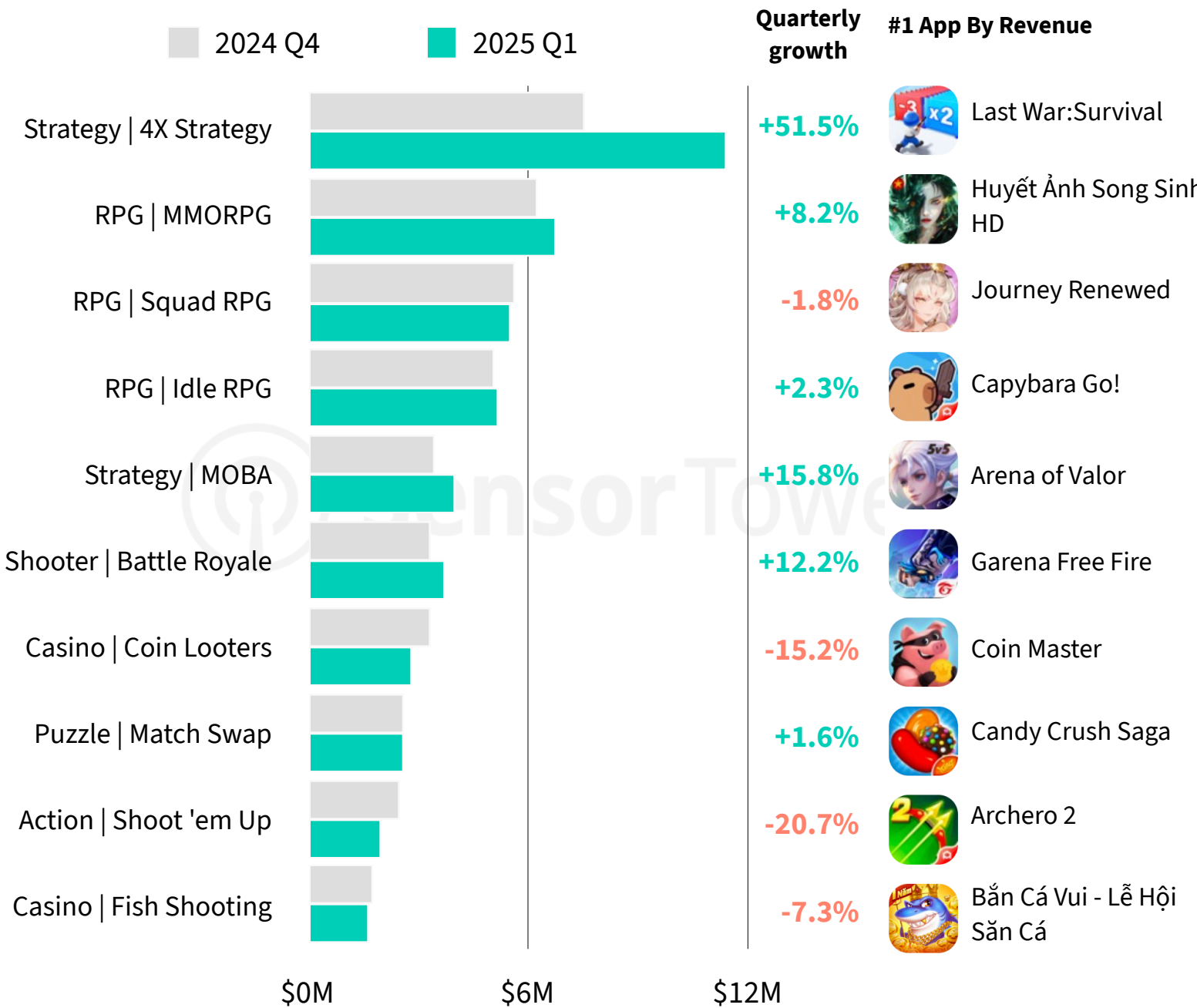
Data Source: Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.
Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Platformer/Runner subgenres, led by *Talking Tom Gold Run* topped download volumes with steady growth; Puzzle Riddle games also climbed. For revenue, beyond 4X Strategy's surge in revenue, MMORPGs like *Huyết Ảnh Song Sinh HD* maintained healthy earnings, reflecting a market valuing diverse, immersive experiences, including single-player ones.

Vietnam Top Subgenre by Downloads



Vietnam Top Subgenre by Revenue

































Vietnam's Q1 2025 Top Games: Local Titles Fuels Download Growth, While New RPG/Strategy Titles Show Strong Monetization

Data Source: Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.
Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Roblox remained Vietnam's top game by downloads, driven by the success of its localized version, while *Garena Free Fire* led revenue (also #2 in downloads). Local casual game *Trò Vẽ Vui Tuổi Thơ* showed strong organic appeal, leading download growth (#3 overall). International titles thrived such as *Last War:Survival* thrived alongside new, locally appealing RPG/Strategy games like *Big Bang Thời Không* and *Huyết Ảnh Song Sinh*, signaling a dynamic Vietnamese market where success often hinges on deep localization or strong local publishing partnerships.

 **Top 10 Mobile Games in Vietnam** Unified • Jan 1, 2025 - Mar 31, 2025

Downloads			Downloads Growth			Revenue			Revenue Growth			
vs Q4 2024			vs Q4 2024			vs Q4 2024			vs Q4 2024			
1		Roblox Roblox Corporation	=	1		Trở Về Tuổi Thơ COROCHTI	NEW		1		Garena Free Fire Garena Games Online	▲
2		Garena Free Fire Garena Games Online	=	2		Last War:Survival FUNFLY	NEW		2		Arena of Valor Tencent	▲
3		Trở Về Tuổi Thơ COROCHTI	NEW	3		Tricky Twist Puzzle ABI Games Studio	▲		3		Coin Master Moon Active	▼
4		Last War:Survival FUNFLY	NEW	4		Blood Strike: Vây Hãm Valar Technology Corp	▲		4		Last War:Survival FUNFLY	NEW
5		Arena of Valor Garena Games Online	▼	5		Nightmare Puzzles: The Unknown FALCON GAME	▲▲		5		Rise of Kingdoms Lilith	=
6		Tricky Twist Puzzle ABI GLOBAL	▲	6		Survival Escape: Prison Game H2T GLOBAL	▲▲		6		Roblox Roblox Corporation	=
7		Talking Tom Gold Run Outfit7	▲	7		Cat Chaos: Prankster Mirai Games	▲▲		7		Candy Crush Saga Microsoft Corporation	▼
8		Supreme Duelist 2021 Neron's Brother	▲	8		NoWiFi - Relaxing Arcade QY Studio	▲		8		TopHeroes Valar Technology Corp	▲
9		Annoying Puzzle Game GPLAY JSC	▼	9		Ninja Tiến Lên HYPER HEAT	▲▲		9		Dark War Survival Florere Game	▲
10		Mobile Legends: Bang Bang Monotone Games	▲	10		FPS Strike Ops : Modern Arena FPS Shooter	▲▲		10		PUBG MOBILE Tencent	▼
											</	

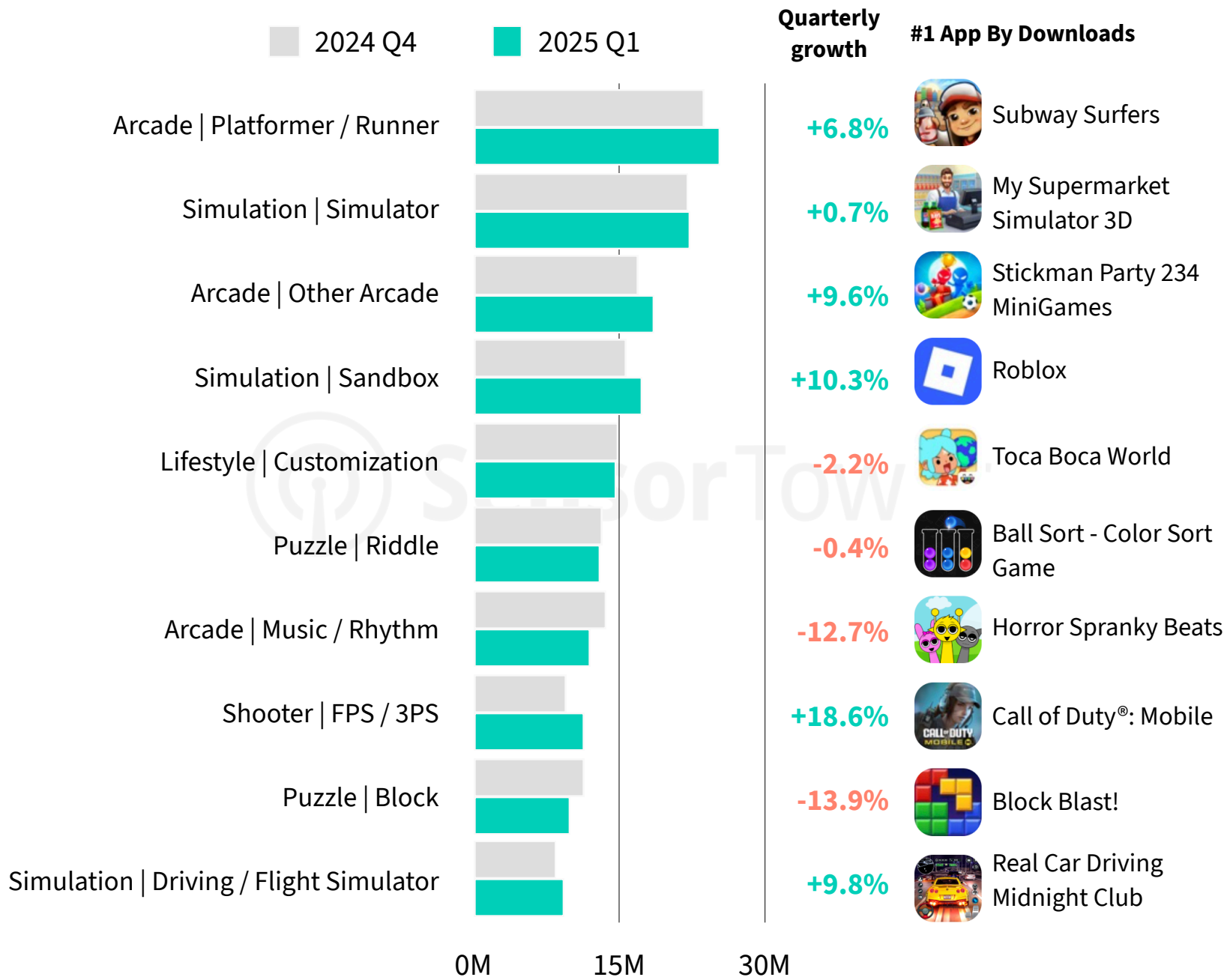


Shooter Subgenres Shine in Philippines Q1 2025, Boosting Both Downloads and Revenue Growth Alongside 4X Strategy & MOBA

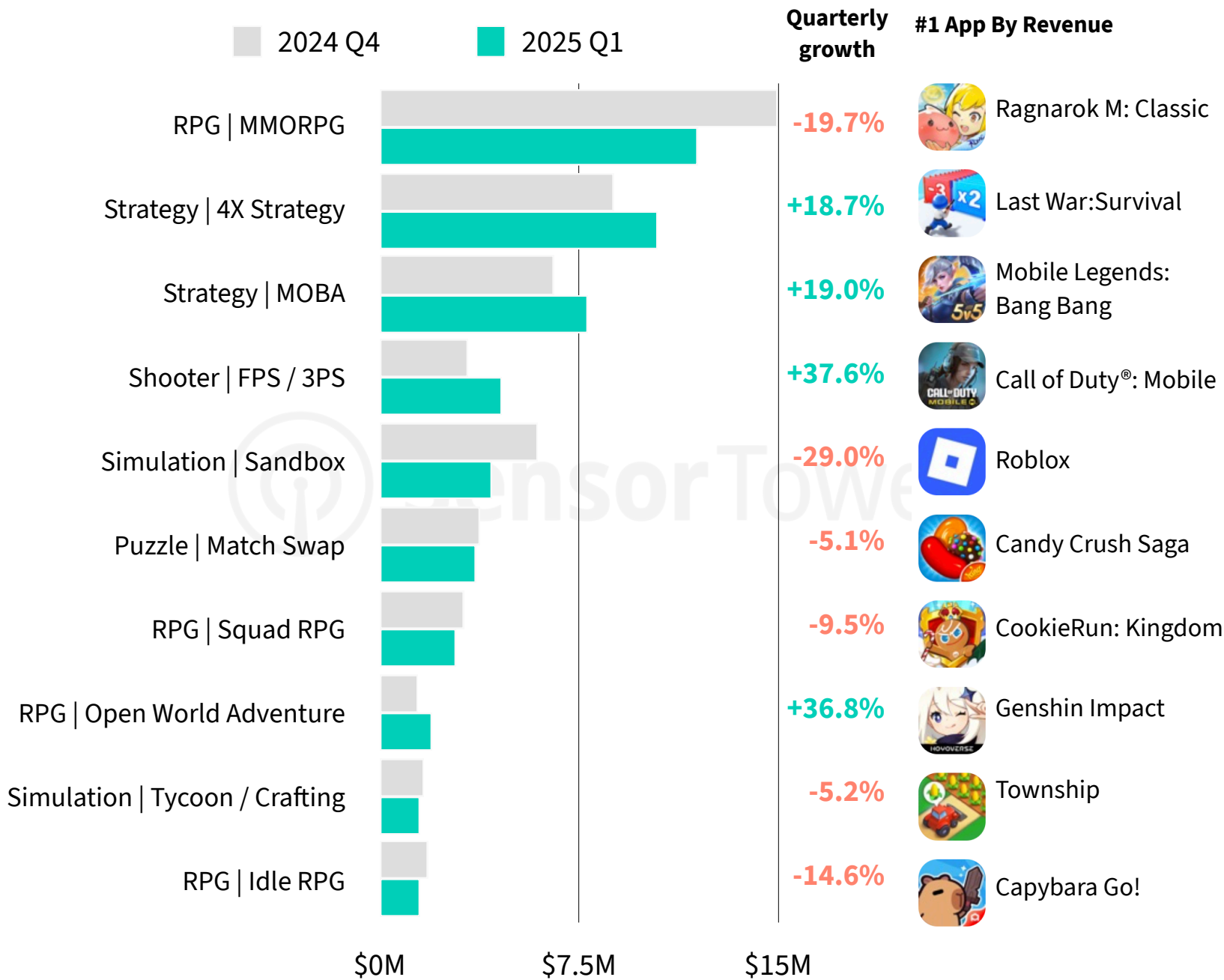
Data Source: Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.
Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Platformer/Runner led download volumes with steady gains; Sandbox Simulation also expanded. While MMORPGs topped revenue by overall volume, the subgenre experienced a notable decline (-19.7% QoQ). Conversely, Open World Adventure RPGs like *Genshin Impact* posted strong revenue growth (+36.8% QoQ). This, coupled with softer demand in some casual download categories, indicates nuanced player preferences.

Philippines Top Subgenre by Downloads



Philippines Top Subgenre by Revenue



Philippines Q1 2025: Newcomers Shine as *Magic Chess: Go Go* Leads Download Growth & *Ragnarok M: Classic* Tops Revenue Growth

Data Source: Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.
Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.











Hyper-casual *Block Blast!* secured top downloads, while MOBA powerhouse *Mobile Legends: Bang Bang* dominated overall revenue and also ranked #2 in revenue growth. Beyond the specific newcomers leading growth charts, diverse new titles like horror game *Hapunan Horror Game* also surged in downloads. Established core titles such as *Call of Duty: Mobile* further demonstrated notable strength, ranking high in both revenue and its growth.



Top 10 Mobile Games in Philippines Unified • Jan 1, 2025 - Mar 31, 2025











Downloads

vs Q4 2024

1		Block Blast! Hungry Studio	=
2		Mobile Legends: Bang Bang Moonton Games	=
3		Roblox Roblox Corporation	=
4		Magic Chess: Go Go Moonton Games	NEW ▲
5		Hapunan Horror Game 2002 Studio	NEW ▲
6		Call of Duty®: Mobile Microsoft Corporation	▲
7		Stickman Party 234 MiniGames PlayMax Game Studio	▲
8		Honor of Kings Tencent	▲
9		Subway Surfers Miniclip.com	▼
10		My Supermarket Simulator 3D Game District	▼











Downloads Growth

vs Q4 2024

1		Magic Chess: Go Go Moonton Games	NEW ▲
2		Hapunan Horror Game 2002 Studio	NEW ▲
3		I Am Security Estoty	NEW ▲
4		FPS Strike Ops : Modern Arena FPS Shooter	▲
5		Survival Escape: Prison Game H2T GLOBAL	▲
6		Cat Chaos: Prankster Mirai Games	▲
7		Good Coffee, Great Coffee TAPBLAZE	NEW ▲
8		Plinko Lucky 365 OctopusMD	▲
9		SCHOOLBOY RUNAWAY - Linked Squad	▲
10		Color Game-color game EasyWinz	NEW ▲











Revenue

vs Q4 2024

1		Mobile Legends: Bang Bang Moonton Games	▲
2		Call of Duty®: Mobile Microsoft Corporation	▲
3		Roblox Roblox Corporation	▼
4		Last War:Survival FUNFLY	=
5		Ragnarok M: Classic GungHo Online Entertainment	NEW ▲
6		Dark War Survival Florere Game	▲
7		Clash of Clans Supercell	=
8		MU Monarch WEBZEN	▼
9		Genshin Impact miHoYo	▲
10		Whiteout Survival Century Games	▼

Revenue Growth

vs Q4 2024

1		Ragnarok M: Classic GungHo Online Entertainment	NEW ▲
2		Mobile Legends: Bang Bang Moonton Games	▲
3		Call of Duty®: Mobile Microsoft Corporation	▲
4		Dark War Survival Florere Game	▲
5		Last War:Survival FUNFLY	=
6		Genshin Impact miHoYo	▲
7		TopHeroes River Game HK	▲
8		CookieRun: Kingdom Devsisters	▲
9		Ragnarok Idle Adventure Plus Gravity Game Hub	NEW ▲
10		Love and Deepspace Paper Games	▲



Case Study

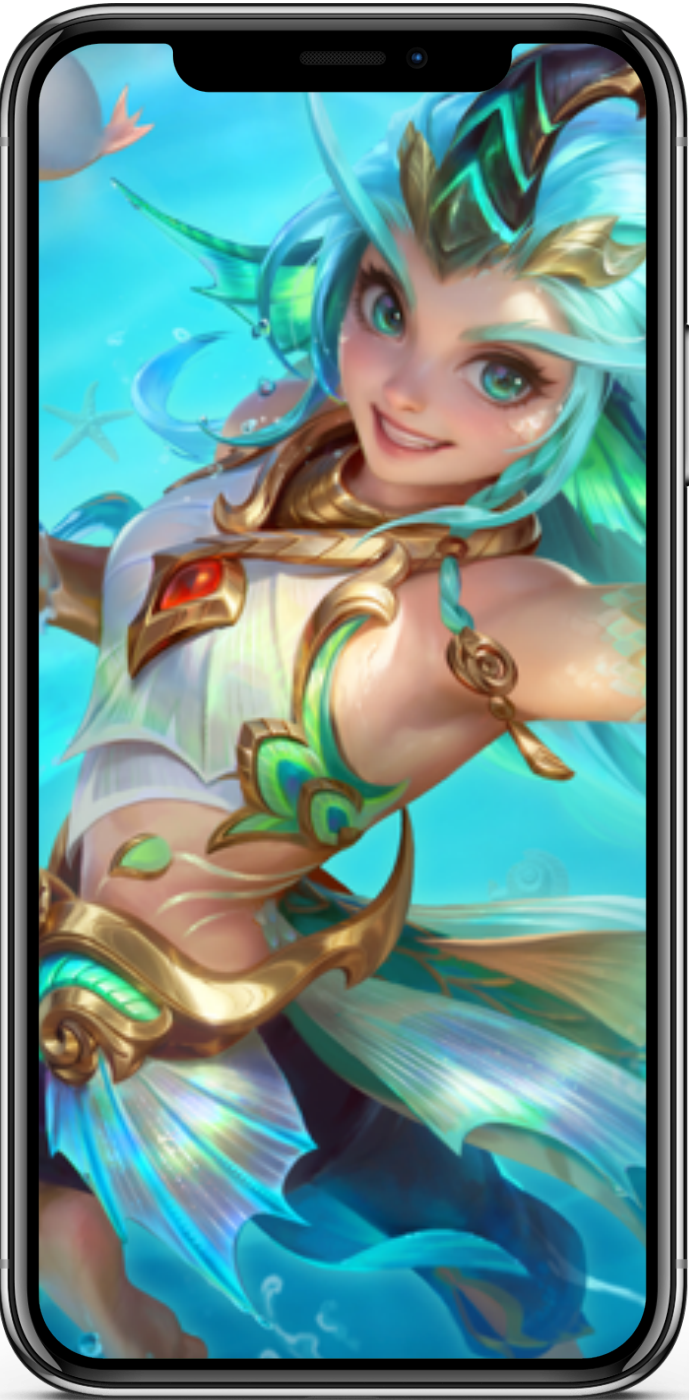
Mobile Legends Bang Bang



Mobile Legends: Bang Bang

Moonton Games

Mobile Legends: Bang Bang (MLBB) maintains remarkable dominance in Southeast Asia, consistently ranking as the region's #1 revenue-generating game in Q1 2025. Launched in 2016, MLBB quickly became an SEA powerhouse, consistently a top 4 download performer and holding a top 2 revenue spot regionally since 2017. This enduring success is largely attributed to Moonton's Hyper-Local Engagement Strategies, including localized content, regional folklore-inspired heroes, dedicated tournaments, and strong community building, keeping MLBB culturally resonant and deeply embedded in SEA's gaming fabric.



Game Overview



















































Release Date	November 2016	Art Style	Stylised Realistic
Genre	Strategy	Camera POV	Top-Down
Sub-Genre	MOBA	Monetization	Paid Game, Live Ops, Season Pass, Subscription, Currency Bundles, Starter Pack, Loot Box
Product Model	Mid-core	Game Tags	Character Collection, Co-op, External Stores, Multi-platform, PvP
Setting	High Fantasy		
Theme	Combat Arena		

Source : Sensor Tower App Intelligence

Mobile Legends: A Dominant Force Across Southeast Asia, Consistently Topping Mobile Game Revenue & Download Charts from 2017 through Q1 2025

Data Source: Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.
Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

🇹🇼 Southeast Asia Top Games by Downloads (2017 - 2025)										
#	2017	2018	2019	2020	2021	2022	2023	2024	2025 Q1	
1	 Mobile Legends: Bang Bang	 Mobile Legends: Bang Bang	 Garena Free Fire	 Worms Zone .io - Hungry Snake	 Garena Free Fire	 Garena Free Fire	 Garena Free Fire	 Garena Free Fire	 Garena Free Fire	 Garena Free Fire
2	 Arena of Valor	 Helix Jump	 Mobile Legends: Bang Bang	 Among Us	 Mobile Legends: Bang Bang	 Mobile Legends: Bang Bang	 Mobile Legends: Bang Bang	 Mobile Legends: Bang Bang	 Mobile Legends: Bang Bang	 Block Blast!
3	 Subway Surfers	 Garena Free Fire	 PUBG MOBILE	 Mobile Legends: Bang Bang	 Higgs Games Island	 Roblox	 Roblox	 Roblox	 Roblox	 Roblox
4	 Clash of Clans	 PUBG MOBILE	 Tiles Hop EDM Rush	 Garena Free Fire	 Roblox	 Subway Surfers	 8 Ball Pool	 Stickman Party 234 MiniGames	 Mobile Legends: Bang Bang	 Mobile Legends: Bang Bang
5	 My Talking Tom	 Arena of Valor	 Subway Surfers	 Brain Out: Can you pass it?	 Worms Zone .io	 Stumble Guys	 Stickman Party 234 MiniGames	 Block Blast!	 Mobile Legends: Bang Bang	 Magic Chess: Go Go

🇹🇼 Southeast Asia Top Games by Revenue (2017 - 2025)										
#	2017	2018	2019	2020	2021	2022	2023	2024	2025 Q1	
1	 Mobile Legends: Bang Bang	 Mobile Legends: Bang Bang	 Garena Free Fire	 Garena Free Fire	 Garena Free Fire	 Mobile Legends: Bang Bang	 Mobile Legends: Bang Bang	 Mobile Legends: Bang Bang	 Mobile Legends: Bang Bang	 Mobile Legends: Bang Bang
2	 Lords Mobile: Kingdom Wars	 Lords Mobile: Kingdom Wars	 Mobile Legends: Bang Bang	 Mobile Legends: Bang	 Mobile Legends: Bang Bang	 Garena Free Fire	 Roblox	 eFootball	 eFootball	 eFootball
3	 Legacy of Discord-FuriousWings	 Arena of Valor	 PUBG MOBILE	 PUBG MOBILE	 Genshin Impact	 Genshin Impact	 Garena Free Fire	 Roblox	 Roblox	 Last War:Survival
4	 Arena of Valor	 Dragon Nest M - SEA	 Ragnarok M: Eternal Love	 Rise of Kingdoms	 PUBG MOBILE	 Roblox	 Arena of Valor	 Garena Free Fire	 Garena Free Fire	 Garena Free Fire
5	 Lineage 2: Revolution	 Garena Free Fire	 Rise of Kingdoms	 Coin Master	 Roblox	 Arena of Valor	 eFootball	 Coin Master	 Roblox	 Roblox

How Mobile Legends Wins Hearts: Hyper-Local Engagement Strategies

Data Source: Sensor Tower App Advertising Insights

Community Bonding Through Local Culture Initiatives

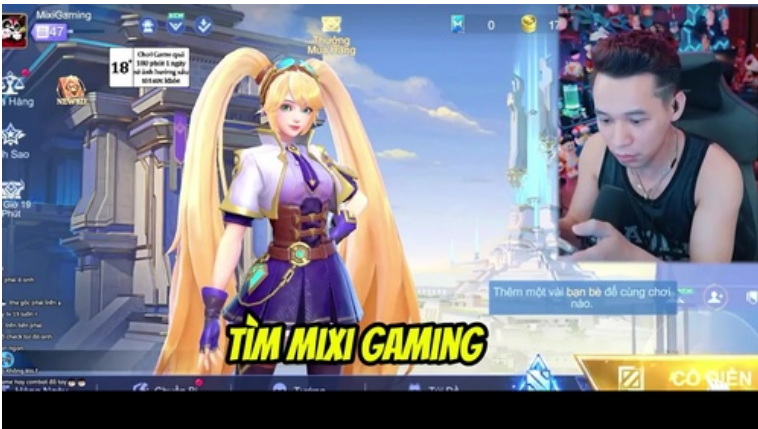
Ini dia keseruan acara 100 Community Hero & Moonton Student Leader MLBB ID berbagi berkah weekend lalu 🙏 mimin hepi pol dapat kiriman foto-foto ini!
Semoga kita semua bisa selalu berbagi kebahagiaan di bulan Ramadan dan seterusnya yagesyaaa~ Buat yang masih menjalankan ibadah Puasa, semangat 🌟 Ayo tabung pahala bareng sebanyak-banyaknya 🙏 #MLBBGoldenMonth #MLBBBerbagiBerkah



Install Now

MLBB fosters goodwill by partnering with student leaders and community heroes for charitable activities tied to local culture, like Ramadan. This builds positive sentiment and highlights the game's everyday relevance.

Authentic & Relatable Streamer Content



Popular local streamers and esports personalities bring authenticity to MLBB's video content. Their influence connects with younger players through humorous, shareable content rooted in actual gameplay.

Real-World Fan Connections via Pop-Up Booths

Summer saya ang hatid ng MLBB Pop-Up Booth this Saturday, March 22! 🌞🎉
Susugod kami sa Sto. Tomas, Batangas upang mamigay ng ligaya at mga papremyo! Siguradong 3 points ang fun dito! 🏀🌟📍 BATANGAS 📍 Brgy. San Rafael, Sto. Tomas | 2PM
<https://maps.app.goo.gl/JzqcG353PgJ6XfRS9> See you, mga ka-MLBB! 🧡 #MLBBPopUp #MLBBBarangayan



Install Now

Offline events like MLBB's pop-up booth create tangible fan connections. These feature live games, giveaways, and meetups, generating memorable brand moments and word-of-mouth.

Leveraging Regional Fandom with Nostalgic Collection Events

Mainit ba ang KOF collection mo? Ito na ang pagkakataon mong ipagmayabang yan! I-share ang screenshot ng iyong KOF collection at gamitin ang hashtag na #MLBBxKOF!
#MobileLegendsBangBang



Install Now

Tapping into regional fandom, MLBB's "King of Fighters" collaboration prompts players to showcase collections on social media. This boosts participation and taps into nostalgic pop culture recognized across Southeast Asia.



Southeast Asia Publishers On the Global Stage

Made in SEA: Publishers from the Region are the World's Top Producers of Mobile Games

The collective output of Southeast Asian mobile game publishers, amounting to over 5.8 billion installs in 2024, established company headquarters in the region as the world's leading source of game downloads.

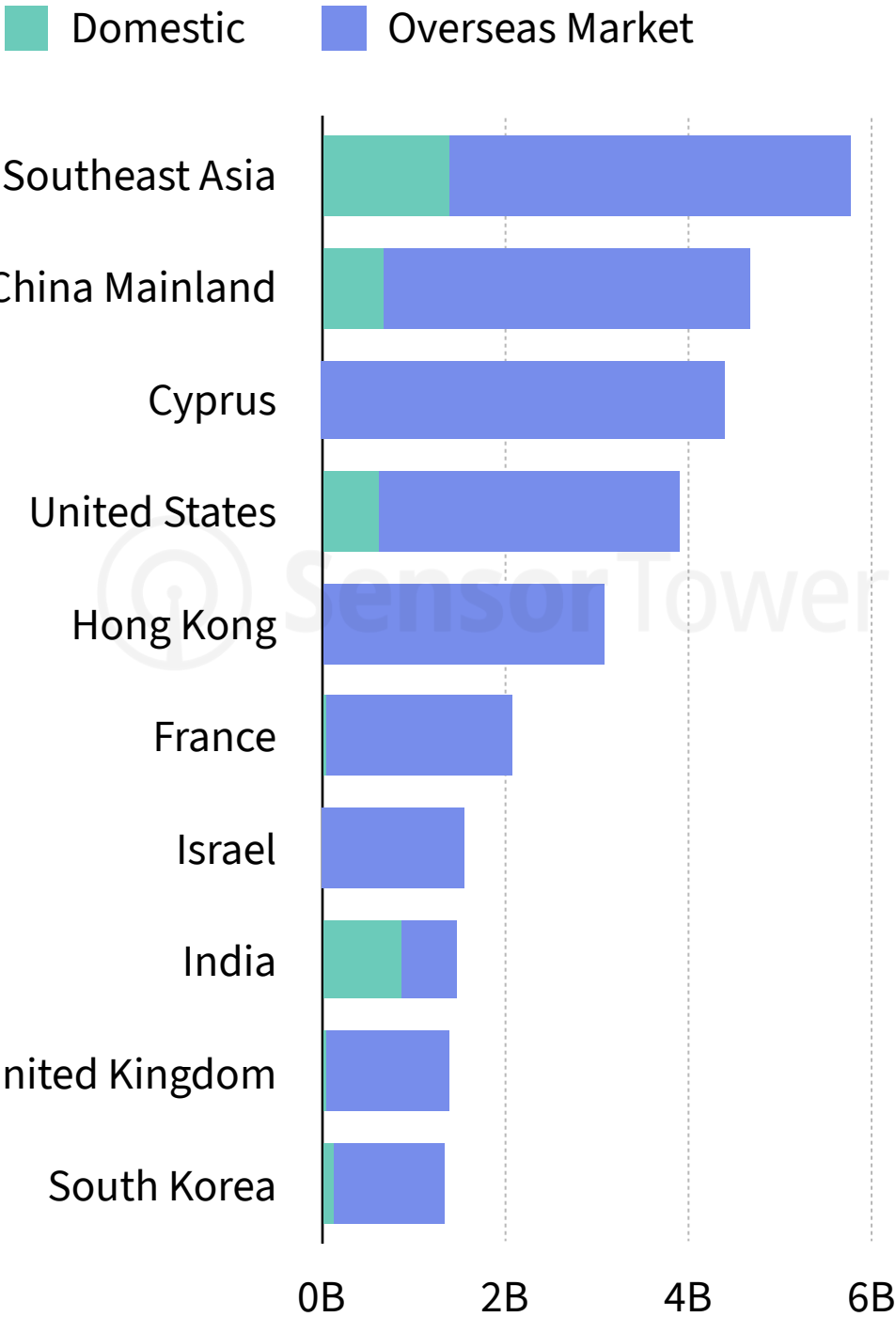
Vietnam's growing influence was particularly evident, with three of its publishers featuring among the global top 15 by downloads, underscoring the nation's rising prominence in global game publishing.

Significantly, the majority of these Southeast Asian game downloads stem from overseas markets, demonstrating the region's strong capability in creating export-ready and globally resonant mobile games.

Data Source: Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.
Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.



Top 10 Mobile Game Headquarters in 2024
By Worldwide Game Downloads



2024 Top Game Publishers by Downloads
Worldwide, iOS & Google Play Combined

- | Rank | Publisher | Flag |
|------|--|-----------|
| 1 | Azur Interactive Games Limited
Worms Zone .io - Hungry Snake | |
| 2 | SUPERSONIC STUDIOS LTD
Build A Queen | |
| 3 | Miniclip.com
Subway Surfers | |
| 4 | SayGames
My Perfect Hotel | |
| 5 | ABI Games Studio
Wood Nuts & Bolts Puzzle | Vietnam |
| 6 | iKame
Wood Screw | Vietnam |
| 7 | voodoo
Hole.io | |
| 8 | Outfit7
My Talking Tom 2 | |
| 9 | BabyBus Group
Baby Panda's School Bus | |
| 10 | Supercell
Pizza Ready! | |
| 11 | Bravestars
Hair Salon: Beauty Salon Game | Vietnam |
| 12 | Embracer Group
Phone Case DIY | |
| 13 | Homa Games
Agent Hunt - Hitman Assassin | |
| 14 | Garena Games Online
Free Fire | Singapore |
| 15 | Electronic Arts
EA SPORTS FC Mobile Soccer | |

Vietnam's Survival Game Surge: Local Publishers Dominate Q1 2025 Global Download Growth with Themed Hits

Vietnamese publishers rode a survival-theme wave in Q1 2025 global download growth.

AMOBEAR’s *456 Run Challenge*, H2T GLOBAL's *Survival Escape*, and Higame Global's *Prison Survival* surged up charts, showcasing Vietnam's adeptness at creating viral hits and capitalizing on trending gameplay for worldwide audiences.

Data Source: Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.

Notes: Sensor Tower’s data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.



Q1 2025 Top 10 Mobile Games Unified • Jan 1, 2025 - Mar 31, 2025

Downloads					Downloads Growth				
vs Q4 2024					vs Q4 2024				
1		Garena Free Fire Garena Games Online	Mid-core Battle Royale	=	1		456 Run Challenge: Clash 3D AMOBEAR	Hypercasual Asymmetric Battle	▲ 152
2		Block Blast! Hungry Studio	Hypercasual Block	=	2		FPS Strike Ops : Modern Arena FPS Shooter	Hypercasual FPS / 3PS	▲ 980
3		Roblox Roblox Corporation	Mid-core Sandbox	▲ 1	3		Cat Chaos: Prankster Mirai Games	Hypercasual Simulator	▲ 749
4		Subway Surfers Miniclip.com	Casual Platformer / Runner	▲ 1	4		Roblox Roblox Corporation	Mid-core Sandbox	▲ 1
5		Ludo King® GAMETION Gametion	Casual Board	▲ 3	5		I Am Security Estoty	Hypercasual Arcade Combat	NEW
6		Pizza Ready! Supercent	Hybridcasual Time Management	▲ 4	6		Super Bear Adventure Earthkwak Games	Hybridcasual Platformer / Runner	▲ 443
7		Hole.io voodoo	Hybridcasual Other Arcade	▲ 4	7		Survival Escape: Prison Game H2T GLOBAL PTE. LTD.	Hypercasual Other Arcade	▲
8		456 Run Challenge: Clash AMOBEAR	Hypercasual Asymmetric Battle	▲ 152	8		Color Block Jam Take-Two Interactive	Hybridcasual Block	▲
9		PUBG MOBILE Tencent	Mid-core Battle Royale	▲ 9	9		Prison Survival: Tap Challenge Higame Global Ltd.	Hypercasual Other Arcade	▲ 165
10		Mini Games: Calm & Relax ONESOFT	Hypercasual Other Arcade	▼ 7	10		Extreme Car Driving Simulator AxesInMotion S.L.	Hybridcasual Driving / Flight Simulator	▲ 158

Vietnamese Game Publishers Thrive by Tapping into Popular Culture

Vietnamese developers have shown a keen ability to develop mobile games that resonate well with audiences.

By focusing on engaging gameplay and tapping into popular trends, they have successfully positioned their titles among top download charts.

Their strategic incorporation of cultural elements and themes relevant to current global trends enhances user engagement and monetization potential, reflecting their astute market understanding and creative capabilities in the mobile gaming industry.

Data Source: Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.

Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.



Worldwide Cumulative Downloads of Survival - Themed Games by Vietnam Publishers

Unified • All Time as of May 19th 2025



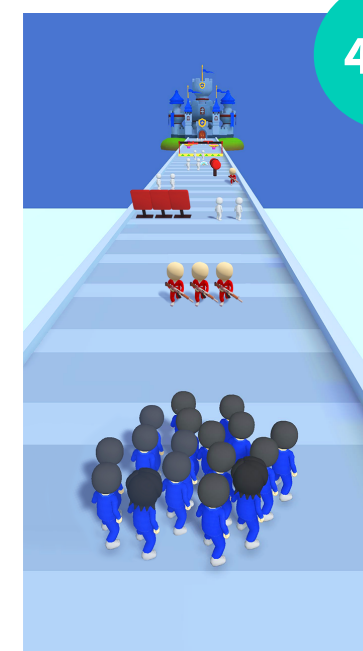
456 Run Challenge: Clash 3D
AMOBEAR



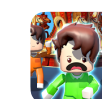
86 M



Prison Survival: Tap Challenge
Higame Global Ltd.



42 M



Survival Escape: Prison Game
H2T GLOBAL PTE. LTD.





































































20 M

Global Impact of SEA Publishers: Diverse Genres and Local Studios Make Their Mark in Q1 2025

Data Source: Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.
Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Garena's *Free Fire* (Singapore) topped global Q1 2025 downloads, while IKame's *Car Race* (Vietnam) emerged as a leading racing title globally. These diverse genre successes underscore SEA's regional strength and growing capability to produce varied, globally appealing mobile hits, marking it as an increasingly influential global development hub.

Top 10 Southeast HQ'd Game Publishers by Worldwide Downloads Unified • Jan 1, 2025 - Mar 31, 2025

 Vietnam	 Singapore	 Malaysia	 Thailand	 Philippines	 Indonesia
<div>1</div> <div> iKame Car Race</div>	<div>1</div> <div> Garena Games Online Free Fire</div>	<div>1</div> <div> QUEEN CITY Boba DIY Bubble Tea</div>	<div>1</div> <div> GreenTomatoMedia Truth or Dare? Dirty game</div>	<div>1</div> <div> Kooapps Snake.io - Fun Online Snake</div>	<div>1</div> <div> Maleo Bus Simulator Indonesia</div>
<div>2</div> <div> Bravestars Fruit Merge: Match Game</div>	<div>2</div> <div> H2T GLOBAL PTE. LTD. Survival Escape Minigames</div>	<div>2</div> <div> AppXplore Sdn Bhd Snaky Cat</div>	<div>2</div> <div> Metin Yucel Fireboy and Watergirl: Online</div>	<div>2</div> <div> Remy Games Zoo Dental Care Doctor Dentist</div>	<div>2</div> <div> Social Game Lab TopTop: Games&Chat</div>
<div>3</div> <div> HIGAME GLOBAL Prison Survival: Tap Challenge</div>	<div>3</div> <div> Guru Puzzle Game Solitaire - Card Games Classic</div>	<div>3</div> <div> Sia Ding Shen TCG Card Shop Tycoon Simulator</div>	<div>3</div> <div> Jibi Cat Jibi Land : Princess Castle</div>	<div>3</div> <div> Big Giant Games Prison Escape Puzzle Adventure</div>	<div>3</div> <div> IDBS Studio Truck Simulator X -Multiplayer</div>
<div>4</div> <div> ABI Games Studio Galaxy Attack: Space Shooter</div>	<div>4</div> <div> SkySoft Studio Avatar Life World: My Story</div>	<div>4</div> <div> Avari Games Studio Fire Grand Battle Royale Games</div>	<div>4</div> <div> Happy Games Co., Ltd. Fish Royale - Underwater Arena</div>	<div>4</div> <div> GAVIN VENTURES,INC. OKGames - JILI</div>	<div>4</div> <div> Noctua Games Hamster Jump: Cake Tower!</div>
<div>5</div> <div> ONESOFT Goods Puzzle: Sort Challenge</div>	<div>5</div> <div> Flyyes, Inc. ColorBlock : Combo Blast</div>	<div>5</div> <div> SAN Susun Kata - TTS Indonesia</div>	<div>5</div> <div> GAMEINDY Dummy & Toon Poker</div>	<div>5</div> <div> DigiWards Lovely Pet</div>	<div>5</div> <div> CodeXplore Ojol The Game</div>
<div>6</div> <div> XGame Global Town Building Life Simulator</div>	<div>6</div> <div> Casual Joy Games Happy Merge Home</div>	<div>6</div> <div> TREASURETECH CO PTE. LTD. Fun Of Vegas - Casino Slots</div>	<div>6</div> <div> Playpark Company Limited Granado Espada M</div>	<div>6</div> <div> AB Leisure Exponent Inc. BingoPlus - Bingo Games Online</div>	<div>6</div> <div> LemauDev Simulator Perang Sarung 3D</div>
<div>7</div> <div> Think Different FC. Jelly Master: Mukbang ASMR</div>	<div>7</div> <div> IDLERO Bad Cat: Life Simulator</div>	<div>7</div> <div> Play Planet Game Time Big Bang</div>	<div>7</div> <div> Kiragames Co., Ltd. Unblock Me Premium</div>	<div>7</div> <div> GOSU ONLINE CORPORATION Nine Yin Divine Scripture 2D</div>	<div>7</div> <div> VerlyGameDev Herex Simulator Indonesia</div>
<div>8</div> <div> AMOBEAR TECHNOLOGY GROUP 456 Run Challenge: Clash 3D</div>	<div>8</div> <div> GoKids! publishing Truck games - build a house</div>	<div>8</div> <div> Zempot Malaysia Winjoy Online</div>	<div>8</div> <div> Volevi Chayen - word guess party</div>	<div>8</div> <div> CLOVER-FI Games Window Garden - Lofi Idle Game</div>	<div>8</div> <div> Angindev INDOCRAFT 5 : Nuansa Santri</div>
<div>9</div> <div> Zendios Real Car Driving Midnight Club</div>	<div>9</div> <div> Flyfox Games Water Sort!</div>	<div>9</div> <div> Lifebelt Games Pte. Ltd. Max Air Motocross</div>	<div>9</div> <div> LinDuo LinDuo: Learn English</div>	<div>9</div> <div> Hype Up Game Studio Perya Color Game</div>	<div>9</div> <div> Gamerz Hive Offroad Jeep Game 4x4 Driving</div>
<div>10</div> <div> Amanotes Pte. Ltd. Magic Tiles 3</div>	<div>10</div> <div> BRAINWORKS PUBLISHING PTE. LTD. NumMatch: Logic Puzzle</div>	<div>10</div> <div> Khuro Games Sopir Travel Simulator ID</div>	<div>10</div> <div> Funplay World Domino Gaple Online</div>	<div>10</div> <div> Yangyang Mobile The Letter - Horror Novel Game</div>	<div>10</div> <div> ESproject ES Truck Simulator ID</div>


Singapore's Garena Leads Diverse Pack of High-Earning Southeast Asian Game Publishers

Data Source: Sensor Tower App Performance Insights. Games classified by Sensor Tower's Game Taxonomy as of May 21, 2025.


Notes: Sensor Tower’s data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Publishers from Vietnam (e.g., ONESOFT with puzzle games) and Malaysia (TREASURETECH with casino titles) also demonstrated monetization capabilities across varied game genres. This highlights the region's expanding skill in not just developing popular games, but in successfully monetizing diverse gaming experiences on a global scale.

Top 10 Southeast HQ’d Game Publishers by Worldwide Revenue Unified • Jan 1, 2025 - Mar 31, 2025


**Vietnam**

1




ONESOFT
Goods Puzzle: Sort Challenge

2




VNG CORPORATION
Roblox

3




iKame
Screw Out

4




ABI Games Studio
1945 Air Force: Airplane Games

5




Amanotes Pte. Ltd.
Magic Tiles 3

6




LIHUHU PTE. LTD.
Match Triple 3D: Matching Tile

7




ADONE PTE. LTD.
Screw It Out!

8




Bravestars
Fruit Merge: Match Game

9

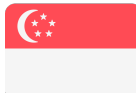


VIETNAM INTERACTIVE TELEVISION JSC
Thần Ma Loạn Vũ - Vplay


10



Nam Ngo
Cake Sort - Color Puzzle Game


**Singapore**

1




Garena Games Online
Free Fire

2




Happibits Game
Merge Cooking®

3




Mytona
Seekers Notes: Hidden Objects

4




SKYWORK AI Pte.Ltd.
The Legend of Neverland

5




MAX GAME PTE.LTD.
Mini Heroes: Magic Throne

6




KINGS FORTUNE PTE.LTD.
Happy Match Cafe™

7




Casual Joy Games
Happy Merge Home

8




VividJoanGames
Bingo Wild - Fun Animal Bingo

9




STONE3 PTE. LTD.
Nova: Space Armada


10



WEJOY PTE. LTD.
Jackaroo King - Original


**Malaysia**

1




Play Planet Game
Trading Legend

2




TREASURETECH CO PTE. LTD.
Fun Of Vegas - Casino Slots

3




Sia Ding Shen
TCG Card Shop Tycoon Simulator

4




7th Beat Games
A Dance of Fire and Ice

5




Kurechii
Postknight 2

6




Yee Ling Lee
Bomb Me

7




AppXplore Sdn Bhd
Crab War

8




Zempot Malaysia
Winjoy Online

9




OPNeon Games
TCG Card Shop Tycoon 2


10



Lifebelt Games Pte. Ltd.
Gun Builder ELITE 2


**Thailand**

1




GreenTomatoMedia
Party Roulette: Group games

2




Playpark Company Limited
Granado Espada M

3




GAMEINDY
Dummy & Toon Poker

4




Electronics Extreme Limited
Audition Dance & Date

5




shan xu
Horror Legend: โลกผี

6




BEYOND GAMES
Wonderland M

7




Digitopolis Co., Ltd.
Dummy Pueak

8




MiracleSongStudio
Isekai : Sky Fantasy

9




Prakasit Sornnam
Dummy Hero


10



Index Asia Ltd
Yume 100


**Philippines**

1




Kooapps
Piano Tiles 2™: Fun Piano Game

2




GOSU ONLINE CORPORATION
Silkroad Origin Mobile

3




Anino Pte. Ltd.
Double Win Vegas Casino Slots

4




Remy Games
Zoo Dental Care Doctor Dentist

5




Big Giant Games
Prison Escape Puzzle Adventure

6




EOL Dev
EOL NextGen

7




Monstronauts Inc.
Potion Punch 2

8




CLOVER-FI Games
Window Garden - Lofi Idle Game

9

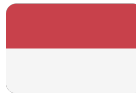


Ranida Labs
Vita Fighters


10



Yangyang Mobile
Love Esquire


**Indonesia**

1




Social Game Lab
TopTop: Games&Chat

2




Mondraw Limited
Pokerrrr 2: Texas Holdem Poker

3




Noctua Games
Crazy Ones

4




Nick Carney
Cracking the Cryptic

5




INDOPLAY
Mango Capsa Susun

6




Megaxus Infotech
AyoDance Mobile

7




Ikan Asin Production
Citampi Stories: Love and Life

8




Akhir Pekan Studio
Laundry Store Simulator

9



IRFAN DANI S.Pd
Revelation Legends

10



Deddy Dev
True Three Kingdoms: Five Tiger Generals

Conclusion

1

Southeast Asia is the Growth Engine for Mobile Gaming, with Indonesia at the Core

Southeast Asia continues to be one of the **largest and most engaged mobile gaming regions globally**. Countries like **Indonesia, the Philippines, and Vietnam** consistently rank among the top markets in both downloads and revenue. High mobile penetration, a young gaming population, and a strong culture of social play make SEA a critical region for publishers looking to scale both user base and monetization over time.

2

Genre Preferences Vary Widely, but Strategy, Simulation, and Shooters Stand Out

Top-performing subgenres differ slightly by market, but **Simulation, Strategy (especially 4X and MOBA), and Shooters** emerge as common favorites across the region. Puzzle games also continue to gain traction, especially those with low barriers to entry and viral appeal (e.g. *Block Blast!*). Subgenre performance also reflects shifts in local player behavior—such as stronger sandbox demand in Vietnam, spending in sports in Thailand, or a rise in shooter monetization in the Philippines.

3

Hyper-Localization Fuels Success Across Markets

Mobile Legends: Bang Bang's regional dominance is underpinned by its **deep localization strategy**. Whether it's charity-led Ramadan campaigns in Indonesia, pop-up booths in the Philippines, or influencer activations in Vietnam, MLBB builds cultural resonance through community involvement and local flavor. **IP collaborations** with franchises like *King of Fighters* further strengthen appeal by tapping into shared fandoms in Asia. These efforts show that localization goes far beyond language—it's about timing, relevance, and community connection.

4

SEA Publishers: Diverse Country HQs Fueling Global Impact

SEA publishers, especially from **Singapore** and **Vietnam**, show global impact, leading in downloads and establishing SEA as a key development hub. Q1 2025 highlights include *Garena Free Fire* (Singapore) topping global downloads and IKame's *Car Race* (Vietnam) gaining significant global traction. Vietnamese publishers dominated Q1 2025 global download growth with viral **survival-themed** hits, leveraging trending gameplay. These varied, appealing, and innovative global hits from diverse SEA HQs cement the region's rising influence in the worldwide gaming market.

Sensor Tower

Terms of Use

This report and all original content contained within are wholly owned by Sensor Tower, Inc. © 2025. Modification, republication, distribution, or other unauthorized usage violate this copyright, unless express permission has been granted. App icons, images, and other branding assets are property of their respective publishers and are used expressly for the purpose of editorial commentary. If you would like to republish any of the data contained in this report, please email info@sensortower.com for further information on how to do so. We're always happy to work with news organizations to provide custom data, insights and commentary.

Contact **press-apac@sensortower.com** for help.

Interested in our latest mobile insights?

Read and download our new analysis of the mobile ecosystem at:
sensortower.com/blog

Sensor Tower

APAC Insights Team

Author



Donny Kristianto
Principal Market Insights Manager
Singapore

Contributor



Nan Lu
Senior Director Marketing, APAC
San Francisco

Contributor



Yena You
Mobile Insights Strategist
Seoul

Contributor



Hideyuki Tsuji
Mobile Insights Strategist
Tokyo

Contributor



Rui Ma
Senior Analyst, APAC
Hubei

Contributor



Daniel Zhang
Field Marketing Manager, GCR
Beijing

Contributor




Sara Tan
Marketing Operations, APAC
Singapore


Sensor Tower

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.




Los Angeles
3840 Watseka Ave
Culver City,
CA 90232
United States




New York City
WeWork
33 Irving Place
9th Floor,
#9031 New York,
NY 10023
United States




San Francisco
44 Montgomery St
San Francisco,
CA 94104
United States



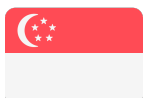
Vancouver
555 Burrard St
Vancouver
BC V7X 1M9
Canada




London
3rd Floor,
Hend House
233 Shaftesbury Ave
London
WC2H 8EE
United Kingdom



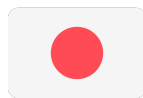
Seoul
909-ho, 22,
Teheran-ro 7-gil,
Gangnam-gu,
Seoul, South Korea,
06130



Singapore
WeWork
9 Battery Road,
Level 6
Singapore 049910
Singapore

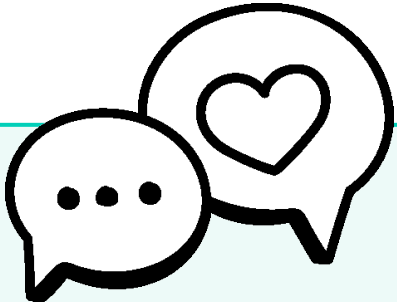


Beijing
Guanghua Ocean
International Center,
10 Jintong Rd (W.),
Tower AB, 7/F,
Chaoyang, Beijing,
100020 China



Tokyo
Kanda First
Building,
45-1 Kandakonyacho,
Chiyoda-ku,
Tokyo 101-0035
Japan

Contact Info:
sensortower.com
sales@sensortower.com



Contact Us

Press : press-apac@sensortower.com
Sales: sales@sensortower.com

[Get in touch](#)

Help site

Your online resource for any
questions you may have

[Learn more](#)

Blog

Check out our blog

[Read more](#)

