Vietnam Mobile Gaming 2025

The Next Billion-Dollar Frontier in Southeast Asia

Vietnam Overview 2025

funtap games

75.3 M
Mobile Users

58.5 M
Mobile Players

82%
of midcore games are imported from China
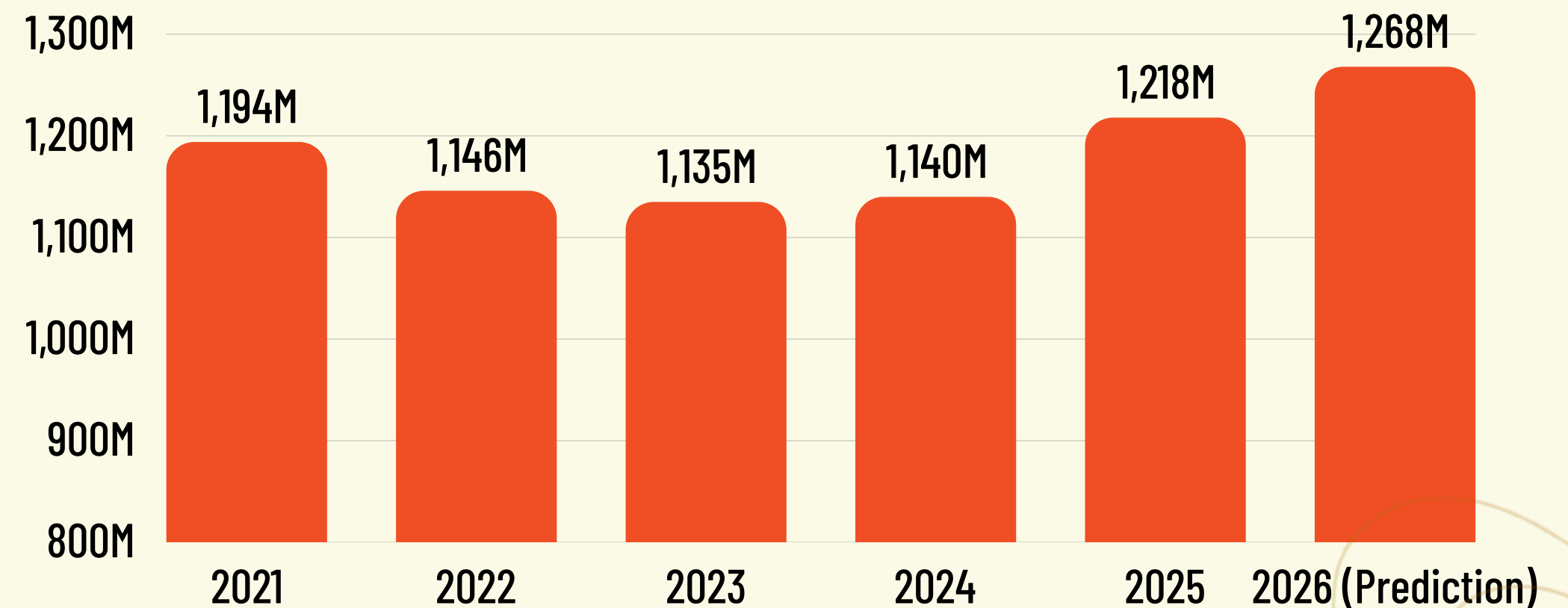
75.7 Mbps
average 5G speed, 99% coverage

x8.9
growth in QR code payments

87.7 %
people aged 15+ have a bank account

Gross Revenue (excluding IAA)
Data is estimated based on internal tools

Growth Rate (all platforms) have remained stable at 9.8% per year, making Vietnam one of the fastest-growing gaming markets in the world.

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Vietnam: Record Drop in Downloads!

1082 unlicensed games were removed, leading to a sharp drop in downloads.

Total downloads have dropped sharply—who benefits?

- Vietnam has entered its most decisive enforcement phase yet. Apple introduced **a dedicated license field** on the App Store for direct government verification.

- A total of 1081 games (mostly mid-core, hybrid casual) were removed, a 40% increase compared to 2024.

- 38 game content licenses were revoked, along with 2 company licenses.

- The removal of unlicensed games has reshaped the market, **creating opportunities for compliant titles**, which contributed to the success of many games in Vietnam in Q4 2025. Further measures are planned for 2026-2027.

-13.7%

Download YoY (2025)

1081

number of games removed

Research Scope & Methodology

Focus: Mid-core Game Data

Although in recent years Funtap Games has been expanding into global game development and publishing, with over 10 years of experience in the Vietnamese market, our data and insights into mid-core games remain our strongest area of expertise.
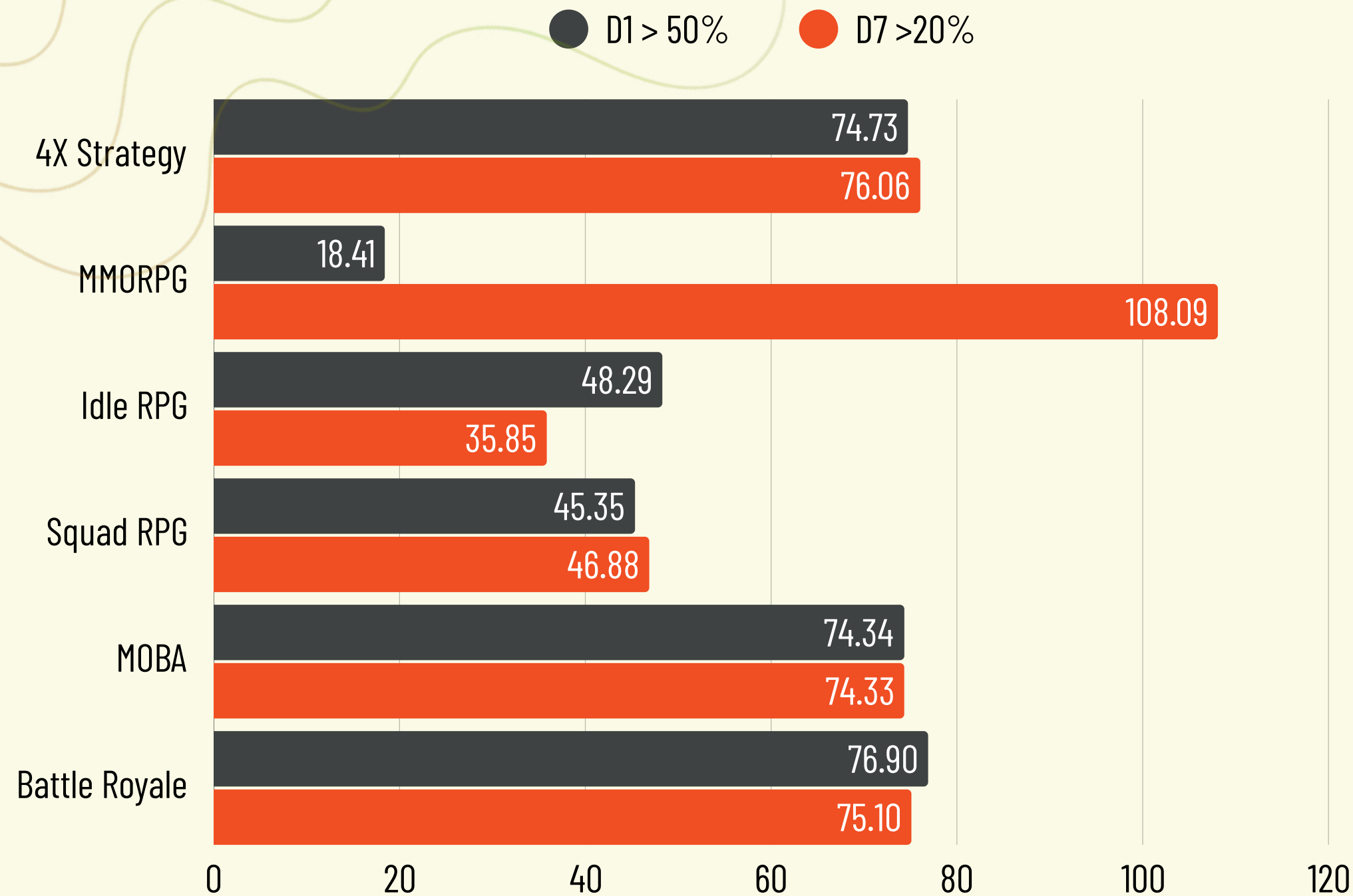
Games Selected for Analysis

We selected over 250 representative games with a sufficiently large number of downloads in Vietnam. The analysis is based on D1 and D7 retention, time spent, as well as the genres with the largest player bases and highest revenue.

Why is this report meaningful?

We observed that even the most reputable tools show significant discrepancies—sometimes higher, sometimes lower—in reported downloads and revenue for the Vietnamese market.

High-Retention Player Behavior

Average Daily Time Spent (minutes) by Game Genre

● D1 > 50%   ● D7 >20%

Genre	D1 > 50%	D7 > 20%
4X Strategy	74.73	76.06
MMORPG	18.41	108.09
Idle RPG	48.29	35.85
Squad RPG	45.35	46.88
MOBA	74.34	74.33
Battle Royale	76.90	75.10

This analysis focuses exclusively on mid-core mobile games with **strong retention** (D1 > 50% and D7 > 20%), aiming to **identify playtime** benchmarks by genre.
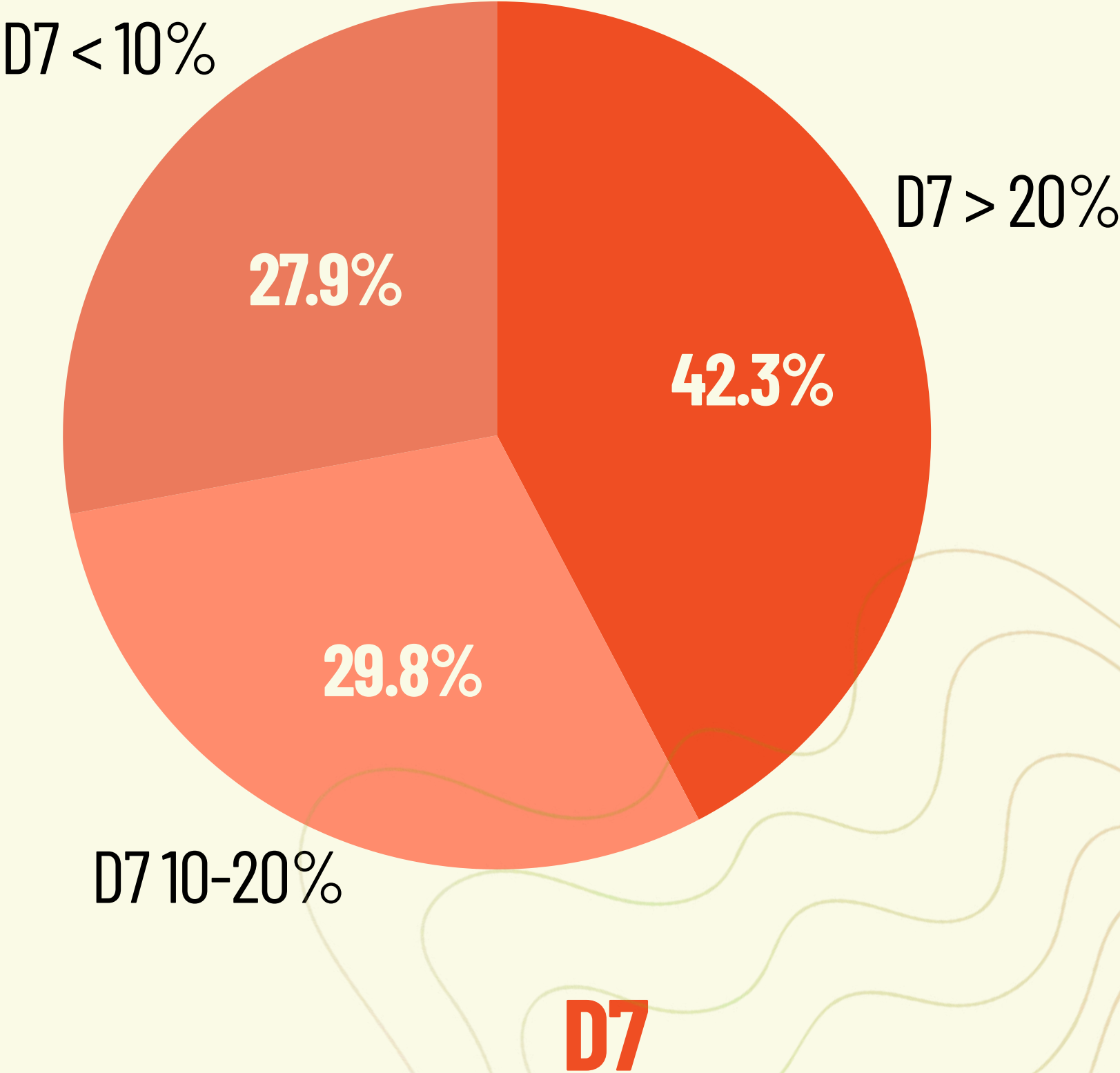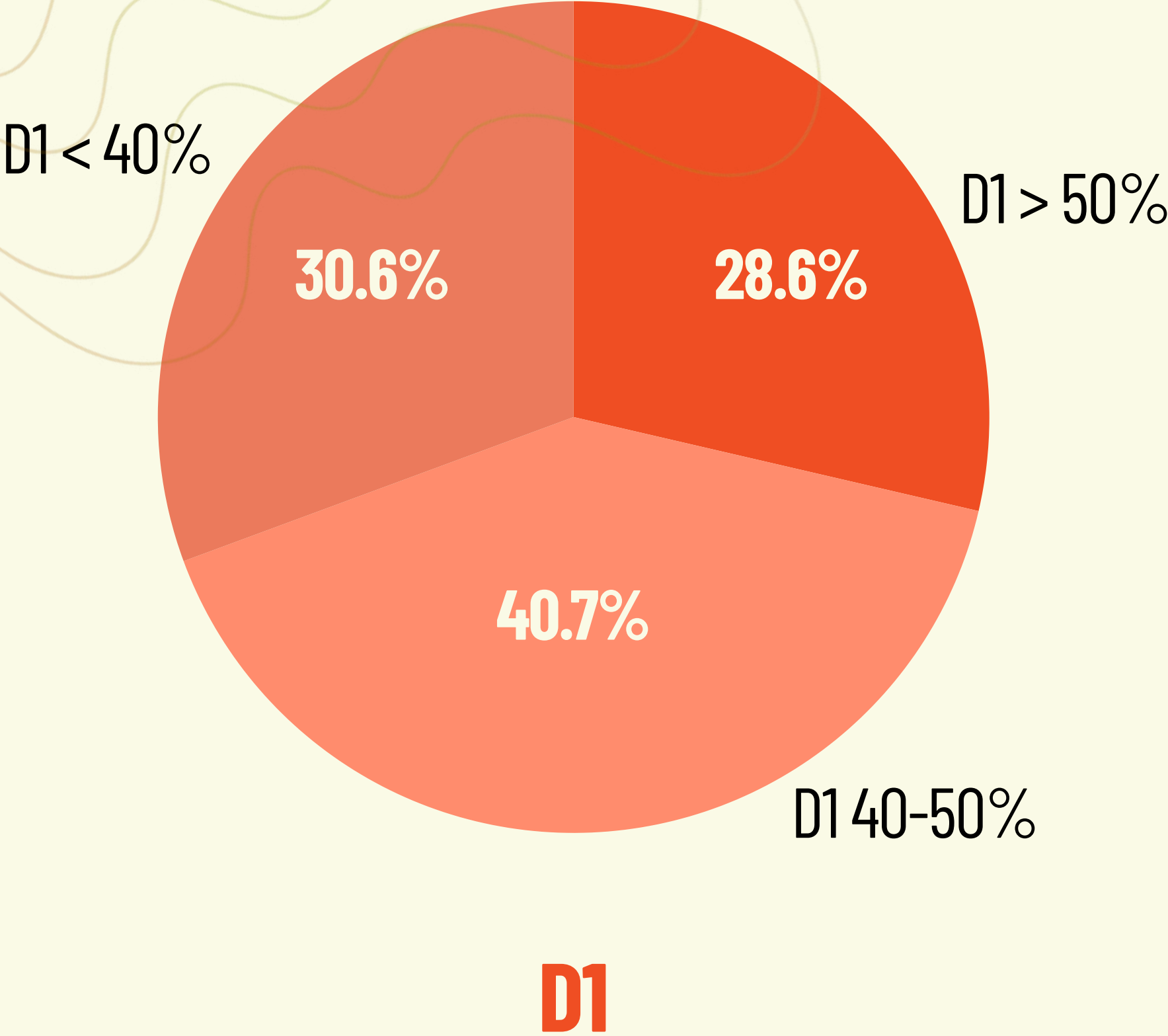
Key Takeaway
- Top-performing 4X strategy, MOBA, and Battle Royale titles average around **75 minutes of daily** player engagement.
- MMORPG players are **extremely picky** when choosing games.
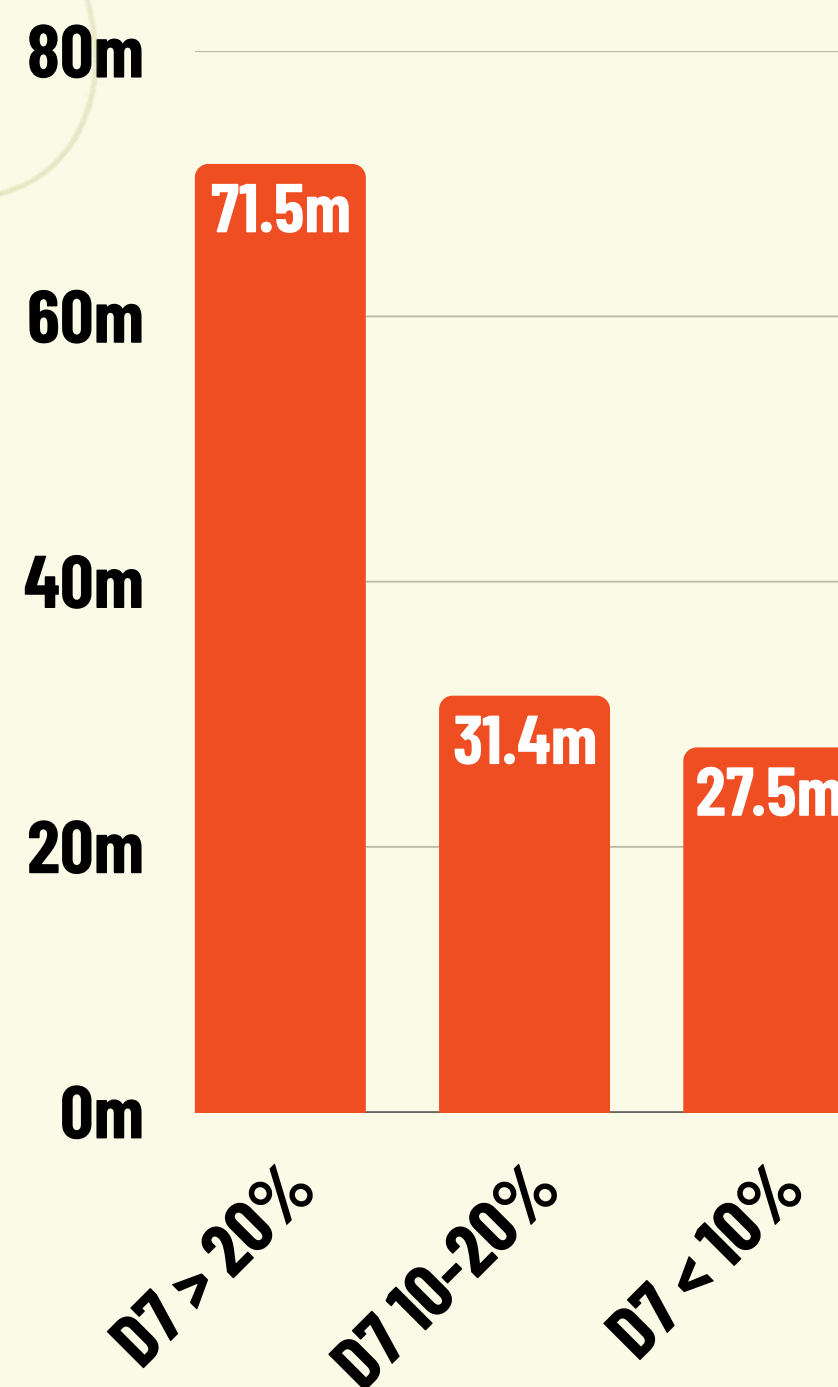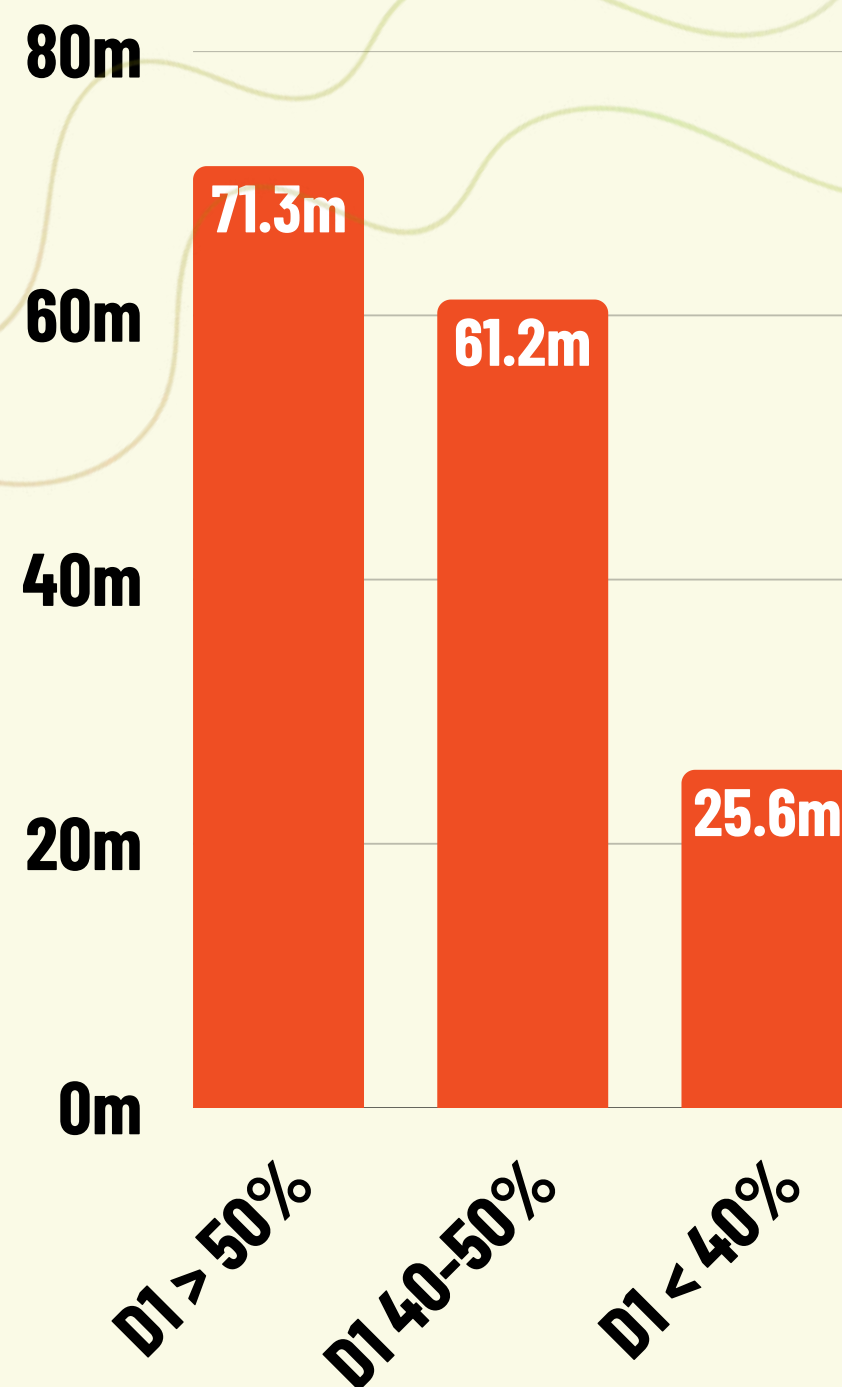- Don't take up too much of the idle game players' time (of course).

Retention Distribution Across Mid-core Games

Share of Downloads

D1

D1 < 40%
30.6%

D1 > 50%
28.6%

D1 40-50%
40.7%

D7

D7 < 10%
27.9%

D7 > 20%
42.3%

D7 10-20%
29.8%

Retention & Playtime Correlation

Chart 1 — D1 Retention:
- D1 > 50%: 71.3m
- D1 40-50%: 61.2m
- D1 < 40%: 25.6m

Chart 2 — D7 Retention:
- D7 > 20%: 71.5m
- D7 10-20%: 31.4m
- D7 < 10%: 27.5m

Insights drawn from 250 representative mid-core games **set new standards**.

Key Takeaway

- **D1 < 40% and D7 < 20%** we believe this is a "hard to scale" zone.

- **D1 > 50% and D7 >20%** we consider this to be the "new standard for mid-core games".

- **D1 40–50%** is a promising range for early-stage testing.

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4X Strategy titles set a Higher Bar

Vietnam Market Insights

- **Interleaved Goals**: never let players complete all objectives at once.
- In 4X games, fun often declines over time (early game > late game) due to rising cognitive load.
- **Replayability** doesn't come from the number of factions, but from adapting to randomized terrain.
- **Bait-and-switch**: Some players admit that even after feeling misled by ads, they continue playing.

Funtap Games has conducted extensive research on this game genre, which we will share on another occasion.
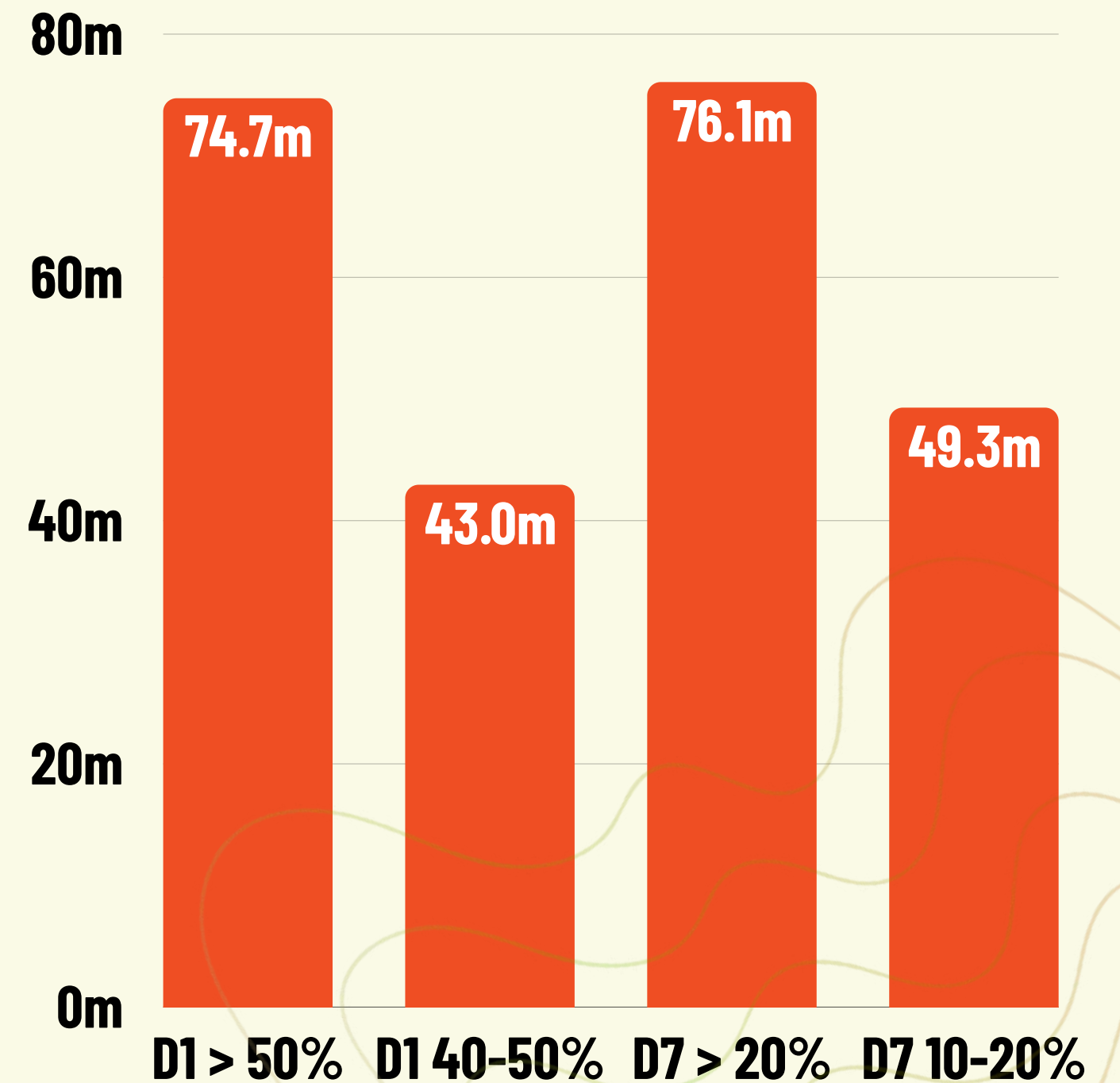
4X Strategy » Game Segments

Game Segments	D1 Retention (Android)	D1 Retention (iOS)	D7 Retention (Overall)	Description
Median	20.7% - 24.9%	24.5% - 31.4%	8.2% - 11.4%	Not competitive enough, **hard to scale**, with thin margins.
Top 20%	29.8% - 35.2%	33.9% - 40.6%	12.5% - 16.8%	The **social ecology functions well**; Guild War and social events have
Top Leaders	39.2% - 45.4%	45.1% - 58.7%	18.4% - 27.6%	**Blockbusters** — highly social games or successful Hybrid 4X titles.

This data was collected through our own surveys and aggregated from other sources:

- **Session Count:** 8–10 sessions/day; Top Leaders: 12+ sessions/day
- **Alliance Join Rate (D3):** >65%; Top Leaders: >80%

Idle RPGs are truly IDLE
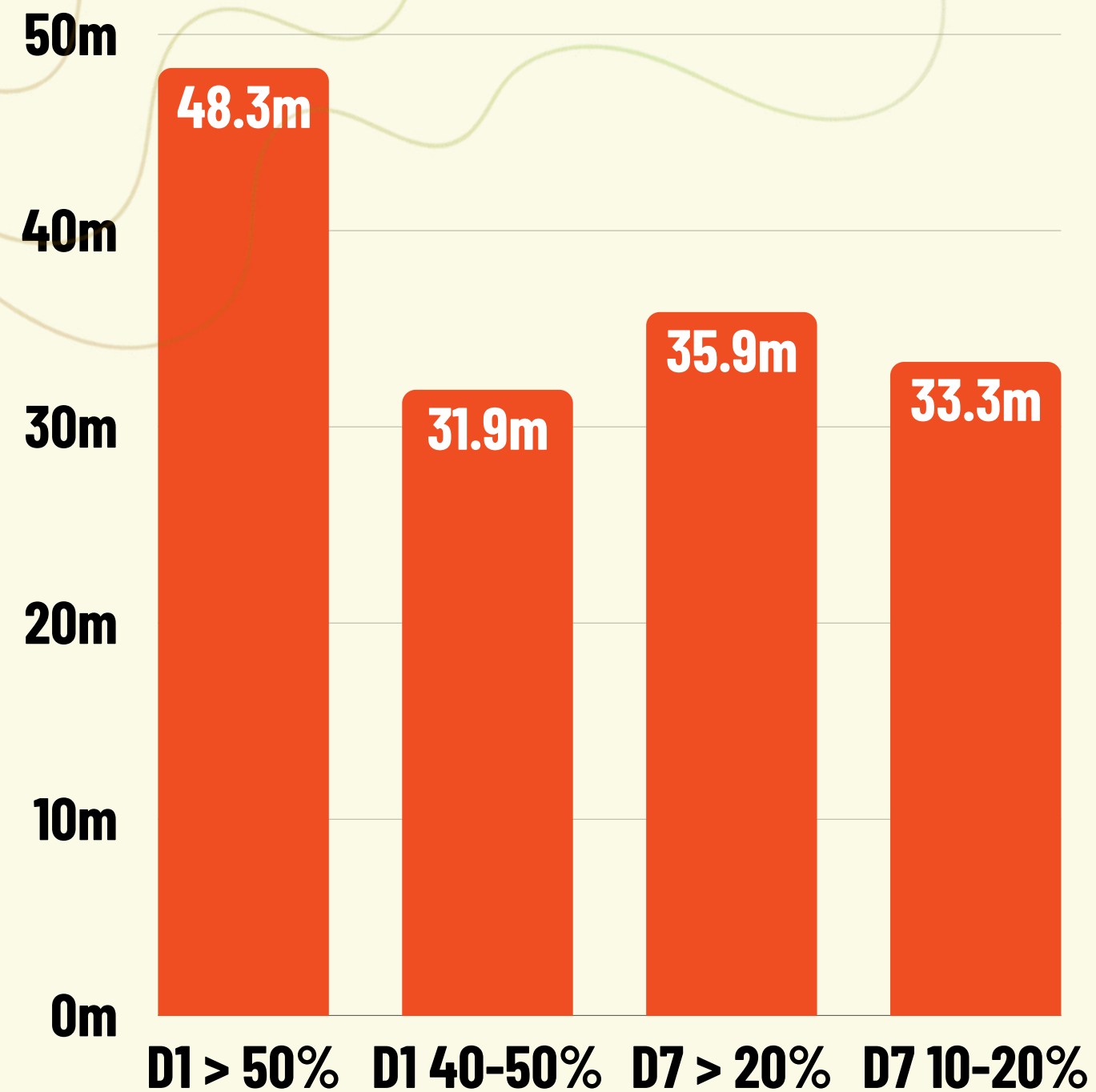
Vietnam Market Insights

- Idle RPG players **fear early cognitive overload**, but crave depth later.

- Players reset not to start over, but to speedrun past previous struggles. **Let's create soft walls.**

- The "Welcome Back" (offline gains) screen is **the most important UI** in the game. Don't show dry numbers— use visuals, sound effects, and celebratory number animations to reward the wait.

Funtap Games: *Target the audience "**Dad Gamers**"!*

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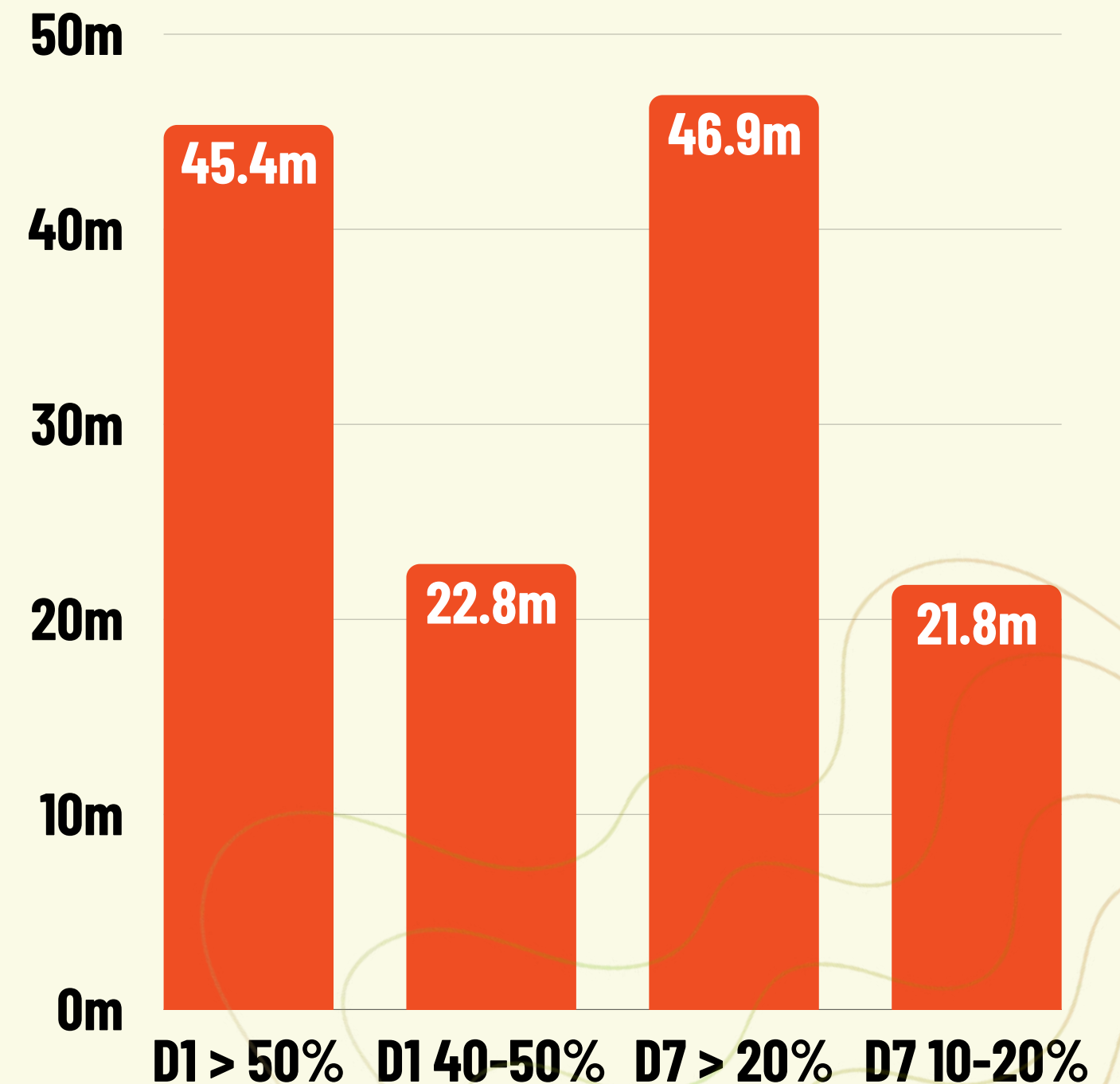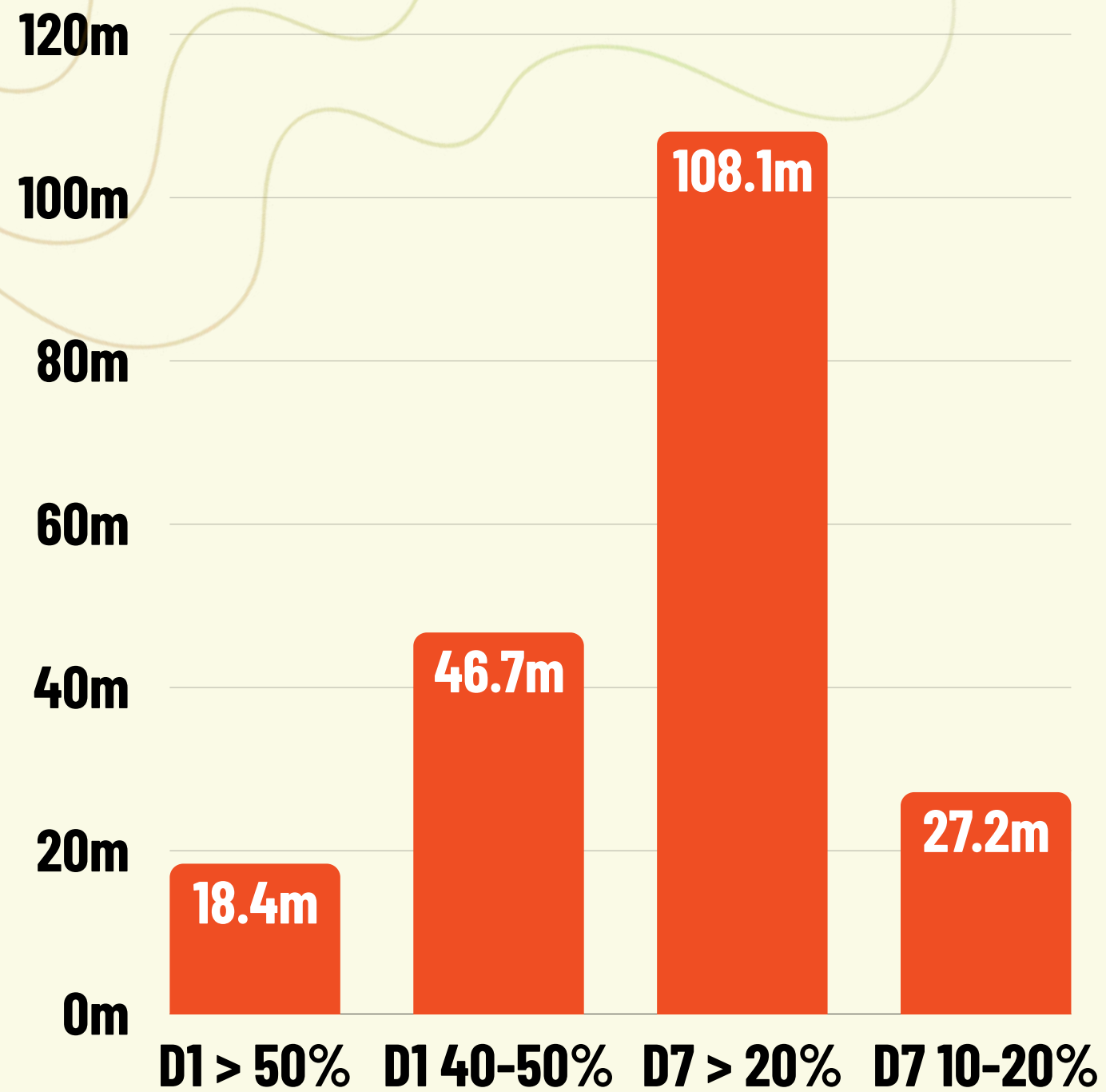
Squad RPG » Management Over Execution

Vietnam Market Insights

- Players want to **manage teams**, not watch repetitive fights. Sweep doesn't reduce playtime—it shifts it from meaningless grind to roster optimization.

- Players churn on D7 when the **"grind wall" appears too early**, as free resources run dry.

- First Purchase isn't the end—trigger a follow-up pack to capitalize on **"already bought" psychology**.

Funtap Games: *At this stage, **D7 >17%** looks solid, while D1 offers limited insight.*

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MMORPGs » Winner-Takes-All Market

Chart

Category	Value
D1 > 50%	18.4m
D1 40-50%	46.7m
D7 > 20%	108.1m
D7 10-20%	27.2m

Y-axis: 0m, 20m, 40m, 60m, 80m, 100m, 120m

Vietnam Market Insights

- Vietnam has a long-standing **grinding culture** rooted in early MMORPGs.

- **LiveOps Pressure**: Over 3.5 hours of daily playtime demonstrates players' strong demand for content.

- Interestingly, even highly engaging games see players just "sample" them on D1. It's like a **good game that should be enjoyed slowly**.

- Use Guild Starter Packs + dedicated CRM to turn Guild leaders into indirect publisher operators.

Funtap Games: *LTV optimization demands **cross-platform**. Mobile-only MMORPGs belong to the past.*

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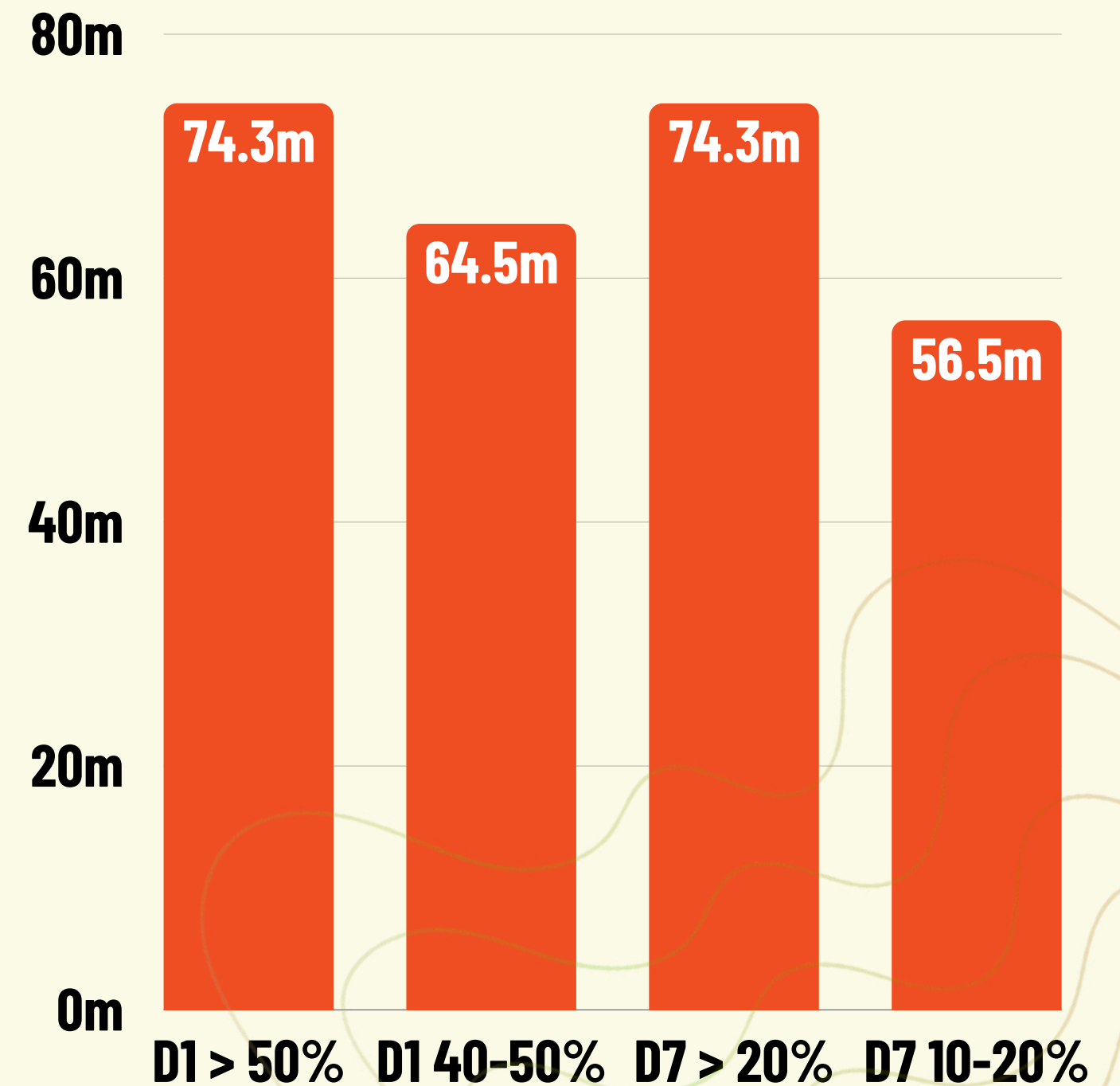
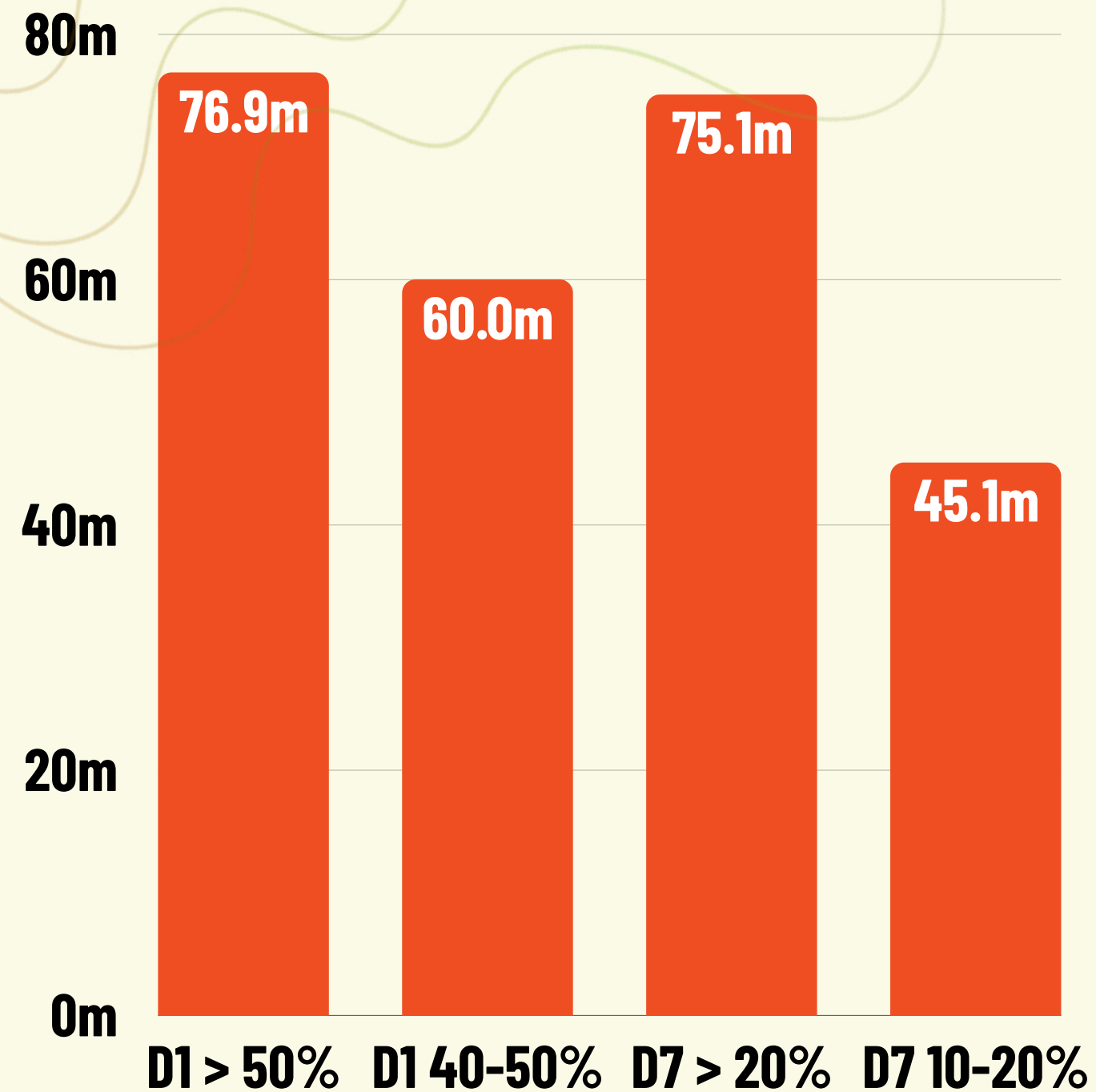# MOBA players Stick with People, not the game

Vietnam Market Insights

- Our research shows that **first-time exposure to toxic behavior** (verbal abuse, griefing) increases immediate churn by over 320% compared to players with normal experiences.
- Esports retention in Vietnam works best with a **multi-tier ecosystem**, not just Pro Leagues. Community to semi-pro tournaments keep players engaged.
- Localization alone isn't enough. Vietnamese gamers are **highly sensitive to UI/UX and cultural nuances**.

Chart values:
- D1 > 50%: 74.3m
- D1 40-50%: 64.5m
- D7 > 20%: 74.3m
- D7 10-20%: 56.5m

(Y-axis: 0m, 20m, 40m, 60m, 80m)

Battle Royale struggles to maintain player interest

Chart:

Category	Value
D1 > 50%	76.9m
D1 40-50%	60.0m
D7 > 20%	75.1m
D7 10-20%	45.1m

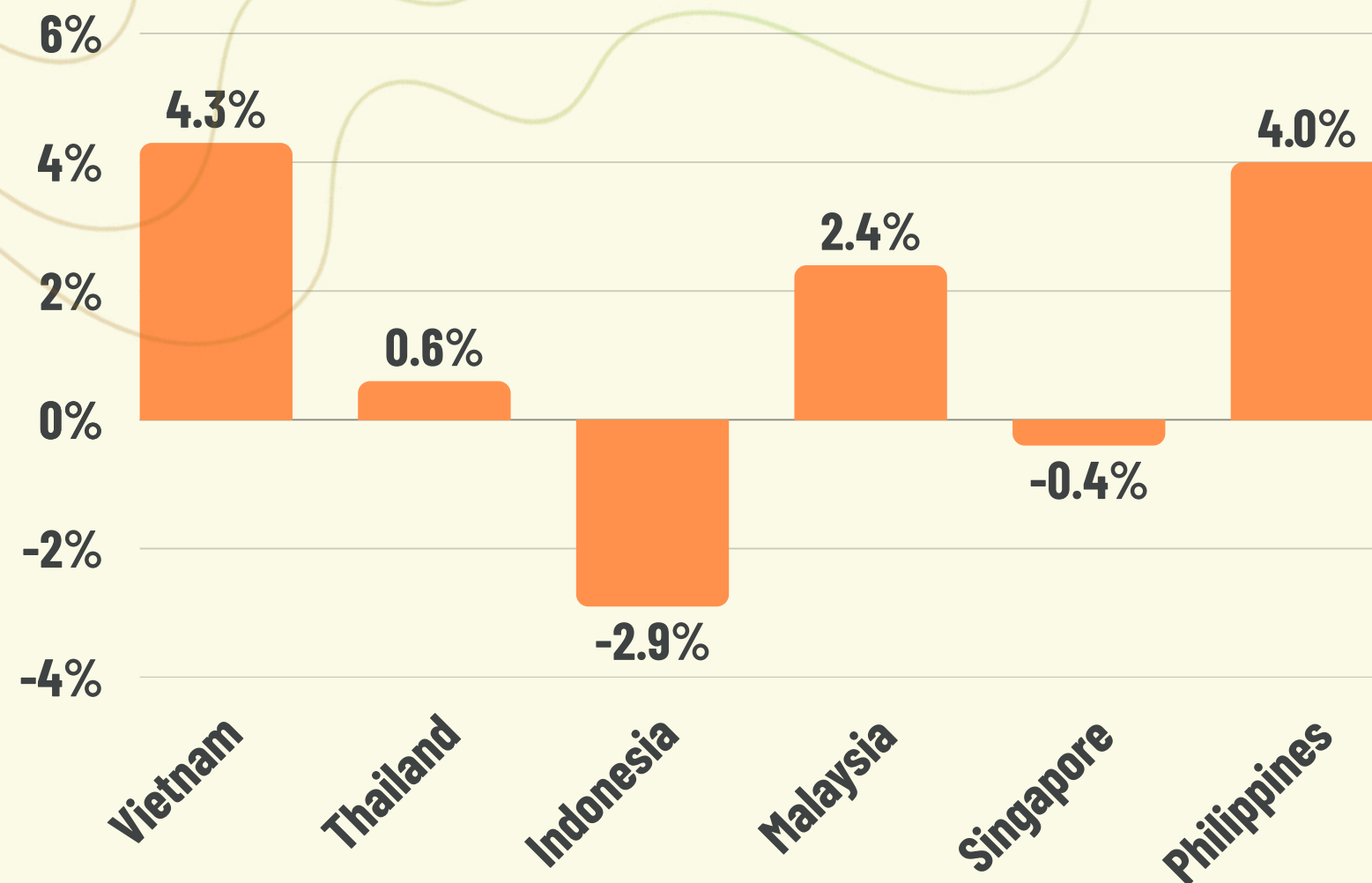Y-axis: 0m, 20m, 40m, 60m, 80m

Vietnam Market Insights

- **Overlapping Segments**: Sandbox (like Roblox) are aggressively targeting this segment, as an inevitable evolution.

- **Fairness is Crucial**: In a 100-player match, **one hacker can ruin** the experience for the other 99.

- **Overloading matches with bots** leads to "hollow victories." Players feel deceived about their actual skill.

- Loot for 20 minutes, die in 2 seconds—Gen Z and Alpha players are **increasingly impatient**.
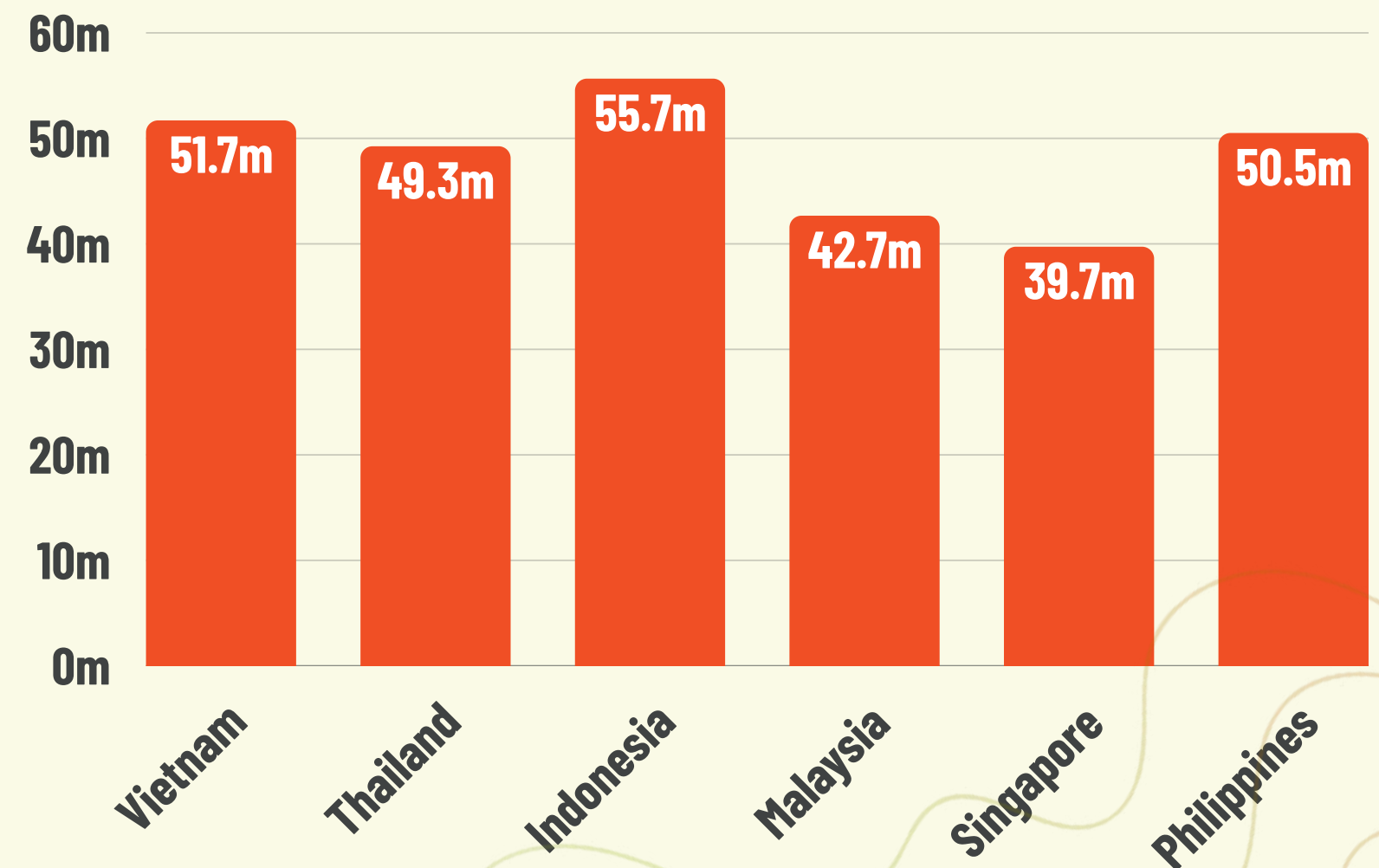
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Vietnam vs. SEA » Time Spent Differences

SEA Market Time Spent Growth (%, 2025)

- Vietnam: 4.3%
- Thailand: 0.6%
- Indonesia: -2.9%
- Malaysia: 2.4%
- Singapore: -0.4%
- Philippines: 4.0%

SEA Market Time Spent (2025)

- Vietnam: 51.7m
- Thailand: 49.3m
- Indonesia: 55.7m
- Malaysia: 42.7m
- Singapore: 39.7m
- Philippines: 50.5m

Mid-core games are seeing a sharp increase in daily playtime.

Vietnam and the Philippines both show clear growth in playtime. However, our research indicates that revenue per download in Vietnam is significantly (at least 28%) higher than in the Philippines.

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Other useful insights

Join Vietnam Gameverse 2026

The largest gaming event in Vietnam, attracting tens of thousands of gamers and offering opportunities to learn from developers and publishers as well as engage in dialogue with government authorities, will take place on May 8–9, 2026, at SECC, Tan My Ward, District 7, Ho Chi Minh City.

Apply for the license early

The removal of unlicensed games creates room for legally compliant titles to grow. All the numbers can be improved, but getting game licenses should be done immediately.

Need more support?

Contact Funtap Games — we're happy to connect you with the right people and provide free guidance on procedures in Vietnam, especially insights into player behavior and habits.

Our Standout Titles
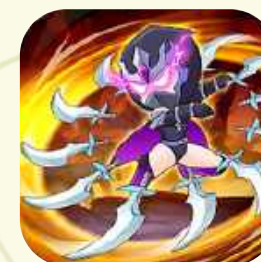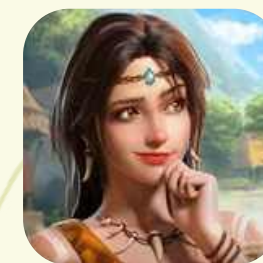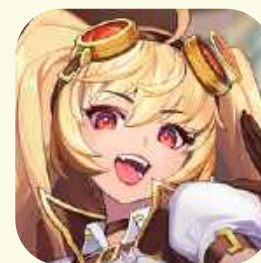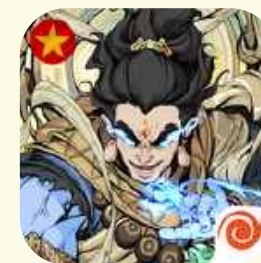
![funtap games logo]

Connect With Us

Funtap Games holds the largest number of game licenses in Vietnam, backed by a team of over 450 people and more than 10 years of operation.

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