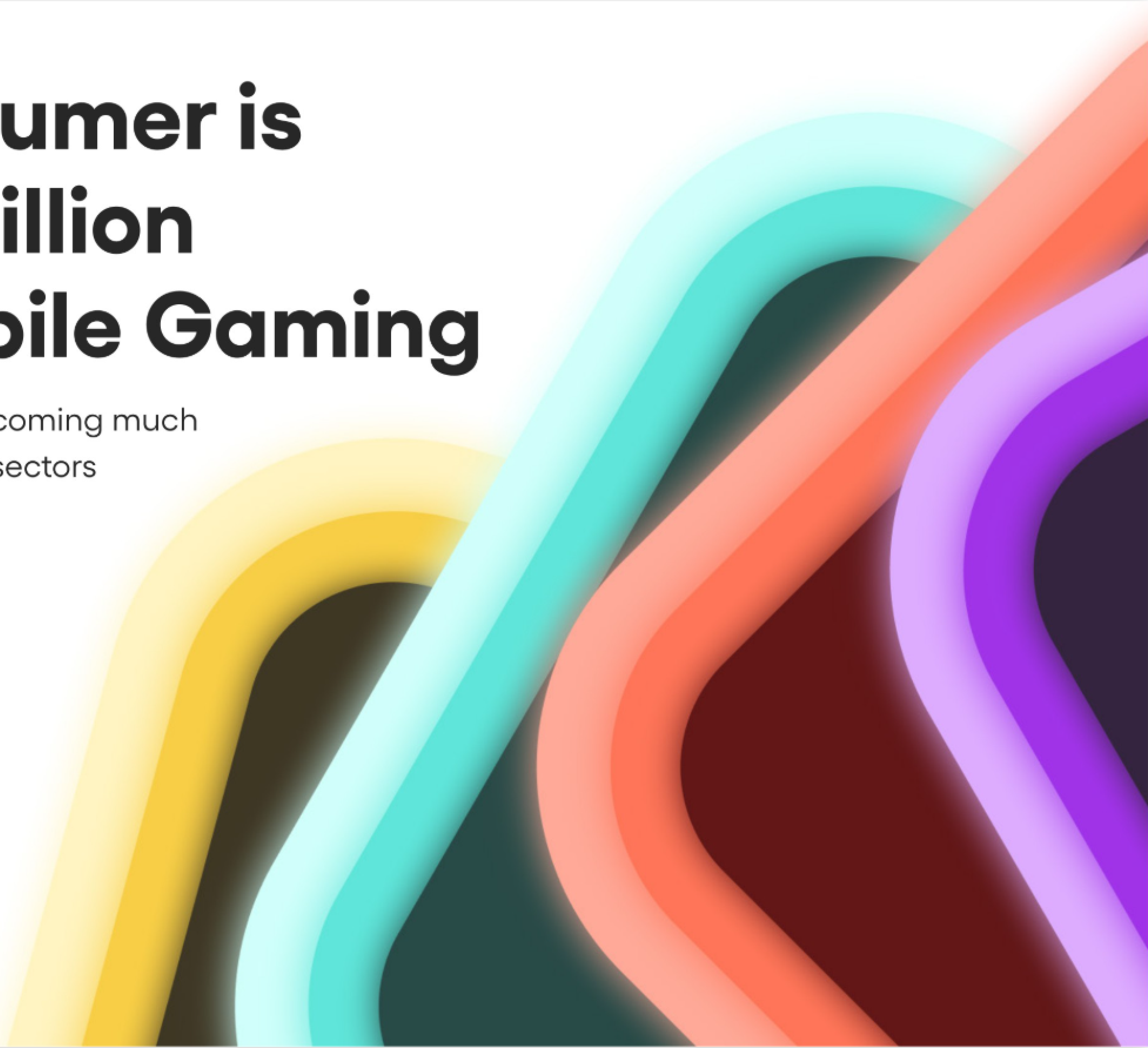
Direct-to-Consumer is Already a $17 Billion Market For Mobile Gaming

What started as a revolt against fees is becoming much more — and is set to be a model for other sectors



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Contents

Introduction

Last year marked a watershed moment for the game industry. On April 30, 2025, a landmark U.S. court ruling forced Apple to let publishers offer in-app transactions directly to their users. That allowed publishers to bypass the 30% transaction fee that went to platforms such as Apple's App Store. Any publisher with an alternative payment system could pocket a double-digit margin increase without breaking a sweat. Boston Consulting Group pegged the total global game market at $254 billion in revenues during 2024.[1] More than $113 billion of that revenue came from in-app purchases, according to Newzoo.[2]

With that amount of money in play, the direct-to-consumer (DTC) channel became a lot more valuable practically overnight. How much more valuable wasn't immediately apparent, however. Web stores operated by game industry professionals have existed for some time, but users haven't necessarily been attuned to their presence, especially if they remained inside the walled gardens of platforms such as Apple's App Store or Google Play. According to Apple, $82 billion flowed through its stores in 2025 via in-app purchases. With those walls breached, developers have new avenues to engage with both new and existing players as well as a substantial ongoing revenue opportunity (see sidebar, "DTC Is at an Inflection Point"). The challenges for developers were essentially twofold: make the DTC channel available and drive users toward it.

To get a better handle on how the channel has changed and what opportunities it might bring, GDC Festival of Gaming surveyed more than 1,200 game industry professionals across a variety of studio sizes and roles on behalf of the game-focused payments company Appcharge. This analysis shows that what may have started as a way around 30% platform fees has, in many cases, become something much bigger. Higher margins, it turns out, are just the beginning of the story.

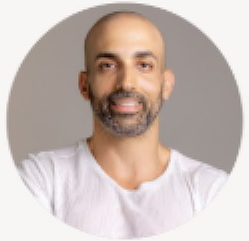
Early adopters of the DTC channel are seeing promising results on a number of fronts. They're reporting rising revenues and expect sales to continue to accelerate. More interaction with users is helping to improve engagement, deepen relationships and create a more fortified competitive position. Momentum has built quickly in less than a year, and early adopters are pouring more resources into building out their DTC channels. But there are still plenty of opportunities for those that haven't yet built out their presence in the channel.

In short, the market is evolving. DTC is no longer a side channel. It's becoming a structural advantage for companies that are able to embrace it and drive traffic to it. Companies that are focusing on DTC as a core priority have an opportunity to widen the competitive gap with companies that remain dependent on app stores.

As rapidly as early adopters have managed to expand the value of their DTC offerings, opportunities still remain. With best practices for taking advantage of the channel at scale still taking shape, even those still on the sidelines could have opportunities to make up ground once they get moving.

As these shifts continue to play out, the DTC opportunity could reach well beyond the game industry. Some estimates forecast platform fee losses for Apple could reach $12.5 billion per year or more. Games are just a portion of app platform offerings. If developers of consumer apps across categories like education, lifestyle, food and drink, health and fitness, shopping, and finance follow suit, developers stand to recoup a substantial slice of revenue.

And for those sectors, like game, higher margins could be just the beginning.



appcharge

Industry Insight: DTC Is at an Inflection Point

Maor Sason, CEO and co-founder, Appcharge

We started building Appcharge when DTC was still considered a workaround. Not because we knew the [Epic v Apple] ruling was coming — nobody did. But because we believed publishers deserved a direct relationship with their players, and that sooner or later, the industry would demand it.

The real story isn't the fee. It's what happens when publishers finally own the relationship with their players. Direct access to data. Control over pricing and offers. And players benefit too — they get more value for their money, because publishers can pass on savings and personalize what they offer.

That's a different business entirely.

Studios aren't just building web stores. They're hiring for roles that didn't exist two years ago, rethinking how they operate, and facing demands the app store model never required.

The publishers who committed to this early aren't just ahead on revenue. They know their players better, they retain them longer, and they have more control over where the business goes next.

In a few years, we won't think of DTC as an alternative. It will simply be how the most successful games operate, with large studios generating 50%+ of their revenue by selling directly to their players.

1. 9 December 2025, Boston Consulting Group. "How Platforms Are Colliding and Why This Will Spark the Next Era of Growth." https://www.bcg.com/publications/2025/video-gaming-report-2026-next-era-of-growth
2. 18 June 2026, Newzoo. "Global Games Revenue Cracked $200 Billion in 2025, https://newzoo.com/resources/blog/global-games-market-q2-2026

Respondents demographics

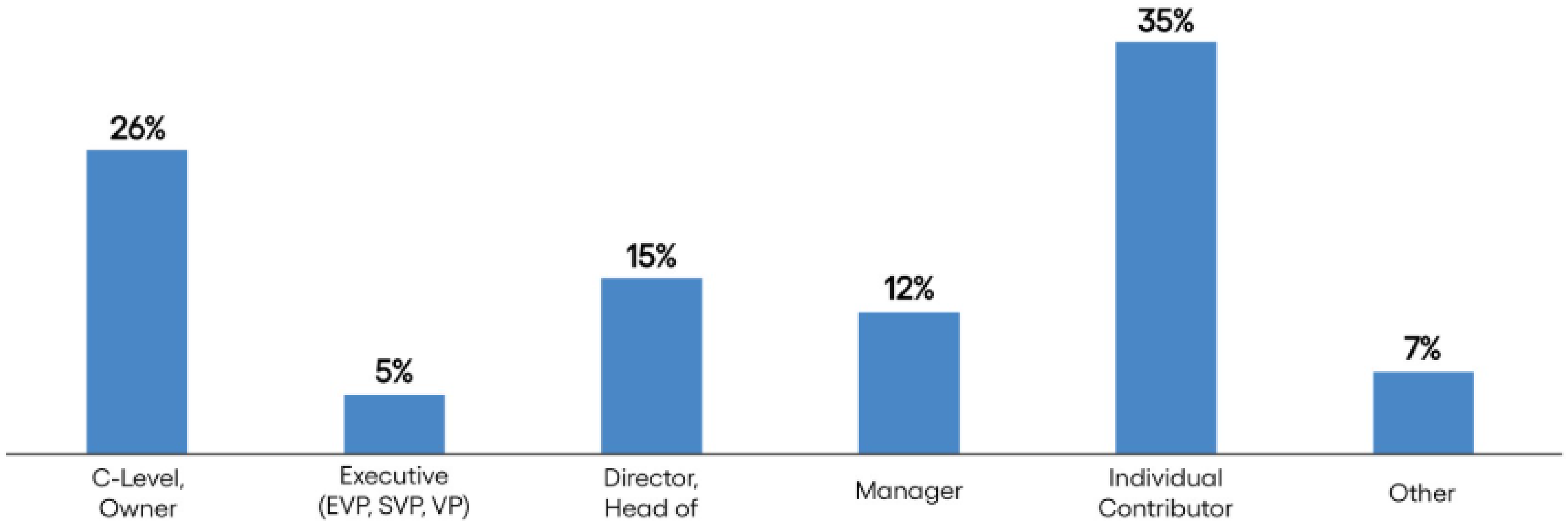
130 qualified respondents responsible for **mobile game strategy and/or development.**

63% of respondents are mobile game strategy decision-makers. Another **28%** are decision influencers.

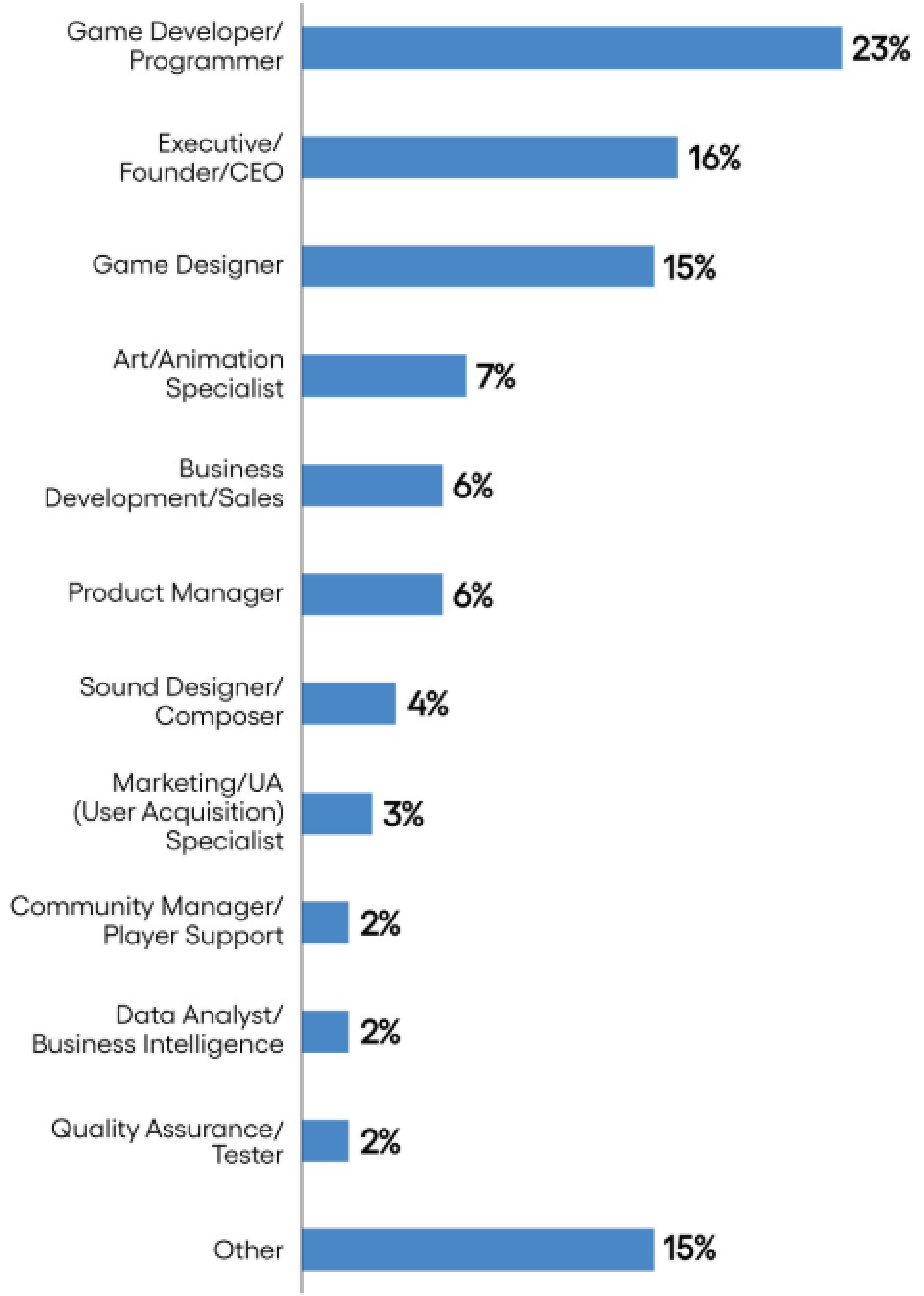
11% of respondents had direct involvement in **mobile games.**

The sample is global, with most respondents based in **North America (68%),** followed by **Europe (18%).**

What is your job level?



What is your primary role/job function?



What did fee changes set in motion?

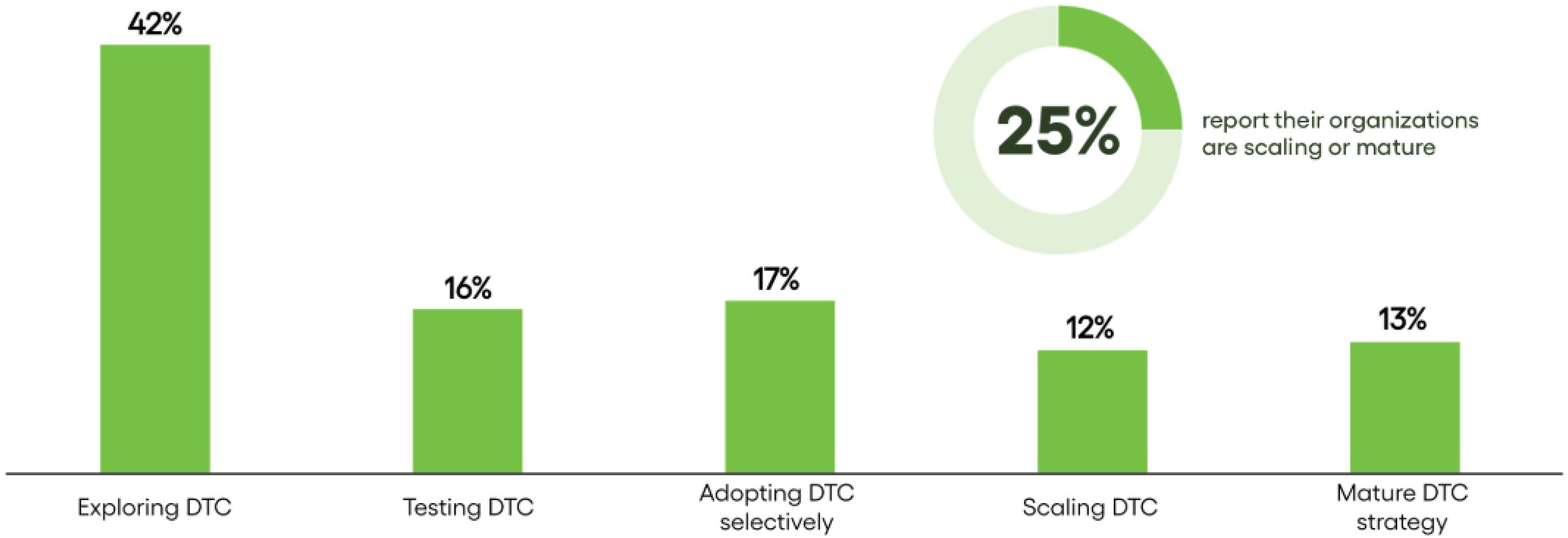
In the wake of recent or anticipated policy changes at Apple and Google, one in four respondents say their organization has increased investment in DTC channels and 16% have deprioritized certain platforms (e.g., iOS, Google Play) for monetization. However, more than half of respondents (52%) have not yet made significant changes to their strategy.

That relative lack of movement reflects the state of DTC strategies across the industry. Most organizations remain in the exploratory or testing stages, after being caught flat-footed as the market underwent rapid changes.

Given the industry's relative lack of experience in the channel, the maturity of DTC strategies is not particularly advanced. Most of the industry (73%) feels at least somewhat confident in their organizational understanding of DTC, but full maturity remains a work in progress. Only about a quarter (27%) of respondents say they are very or completely confident. While the strategic map continues to take shape for many organizations, those at the front are already starting to change the competitive landscape, creating a direct line of communication with their players and raising the potential ROI from the channel. That change has left more than half the industry in the dust.

The shape of the adoption curve suggests a race in its early stages. Innovators are beginning to blaze a trail (see sidebar, "Fee Changes Opened the Floodgates"). The question for the rest of the industry is whether they can follow — and how quickly.

How would you describe the current state of your Direct-to-Consumer (DTC) strategy?



How would you compare your Direct-to-Consumer (DTC) channel strategy to that of your peers in the game industry?

Response Option	%
Lagging behind: We are significantly behind our peers and actively working to catch up.	30%
Catching up: We are slightly behind but making progress to close the gap.	32%
On par: We are roughly in line with the industry average.	24%
Ahead of the curve: We are slightly ahead of most of our peers.	11%
Industry leader: We are leading the industry with a highly advanced DTC strategy.	3%

appcharge

Industry Insight: Fee Changes Opened the Floodgates

Fanny Beili, VP Product, Appcharge

The market is splitting. The publishers who moved early on DTC are pulling ahead fast. Everyone else is still trying to figure out where to start.

And we understand why. For years, the app stores handled everything — payments, fraud, tax, compliance, global currencies. Studios didn't need to think about any of it. That's gone now. Suddenly you need real infrastructure, real expertise, and most teams don't have it internally. And it goes beyond payments. Running DTC at scale means managing your game economy across channels, coordinating LiveOps events with your web store, building monetization strategies that work outside the app store context. These are capabilities that didn't need to exist before. Now they're table stakes.

We see this every day. Setting up a basic web store isn't the hard part. The hard part is making it work at scale — supporting LiveOps cycles, handling chargebacks across 40 markets, keeping conversion high when a player hits a payment wall at 2am in Southeast Asia. That's where most teams run into trouble.

The publishers we work with who are doing this well — they didn't treat DTC as a side project. They made infrastructure decisions early, brought in the right partners, and built it into how they operate. Now the results are compounding. More revenue, yes, but also better player data, better retention, more direct relationships.

Improved margins are only part of the story

Companies that took the plunge into DTC have seen more than just a margin bump. They're also seeing improvements in incremental revenue (see sidebar, "Margin Improvement Is Just the Beginning"). Across all respondents, DTC has provided a median revenue uptick of 15%. Those numbers rise dramatically as companies move up the maturity curve: The median revenue rise for companies that feel they are keeping pace with the competition is 25%. For DTC leaders, it's 35%.

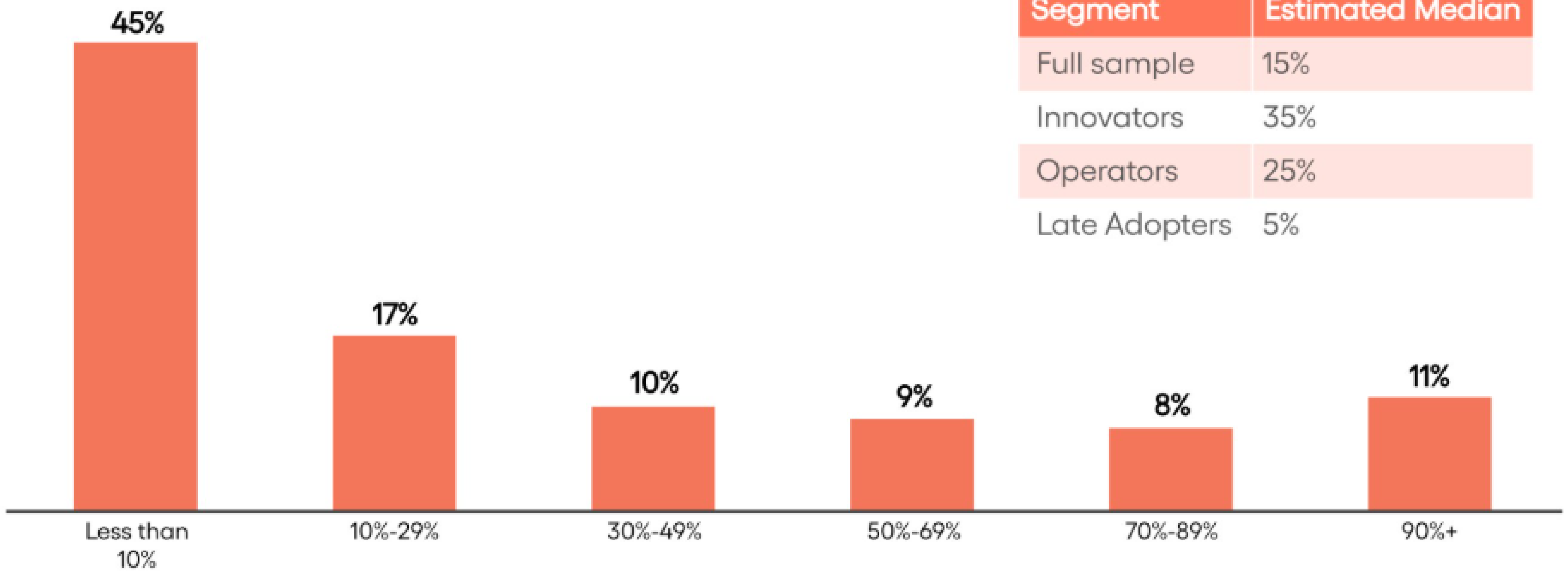
Larger publishers with revenues of $500 million or more have seen greater revenue acceleration than their smaller peers, which hints at the power of scale as this shift continues.

The vast majority of organizations (92%) expect those revenue gains to continue in the near term. In fact, 41% expect double-digit revenue increases in 2026. A meaningful segment even expects DTC revenue to jump 30% or more in the coming year.

And at $113.3 billion of game IAP sales in 2025 per Newzoo, the 15% DTC share across the sample suggests DTC equates to roughly a $17 billion market today.

Approximately what percentage of your revenue comes from DTC?

Segment	Estimated Median
Full sample	15%
Innovators	35%
Operators	25%
Late Adopters	5%



playstudios

Industry Insight: Margin Improvement Is Just the Beginning

Dekel Akela, GM, MGM Live Slots, Playstudios

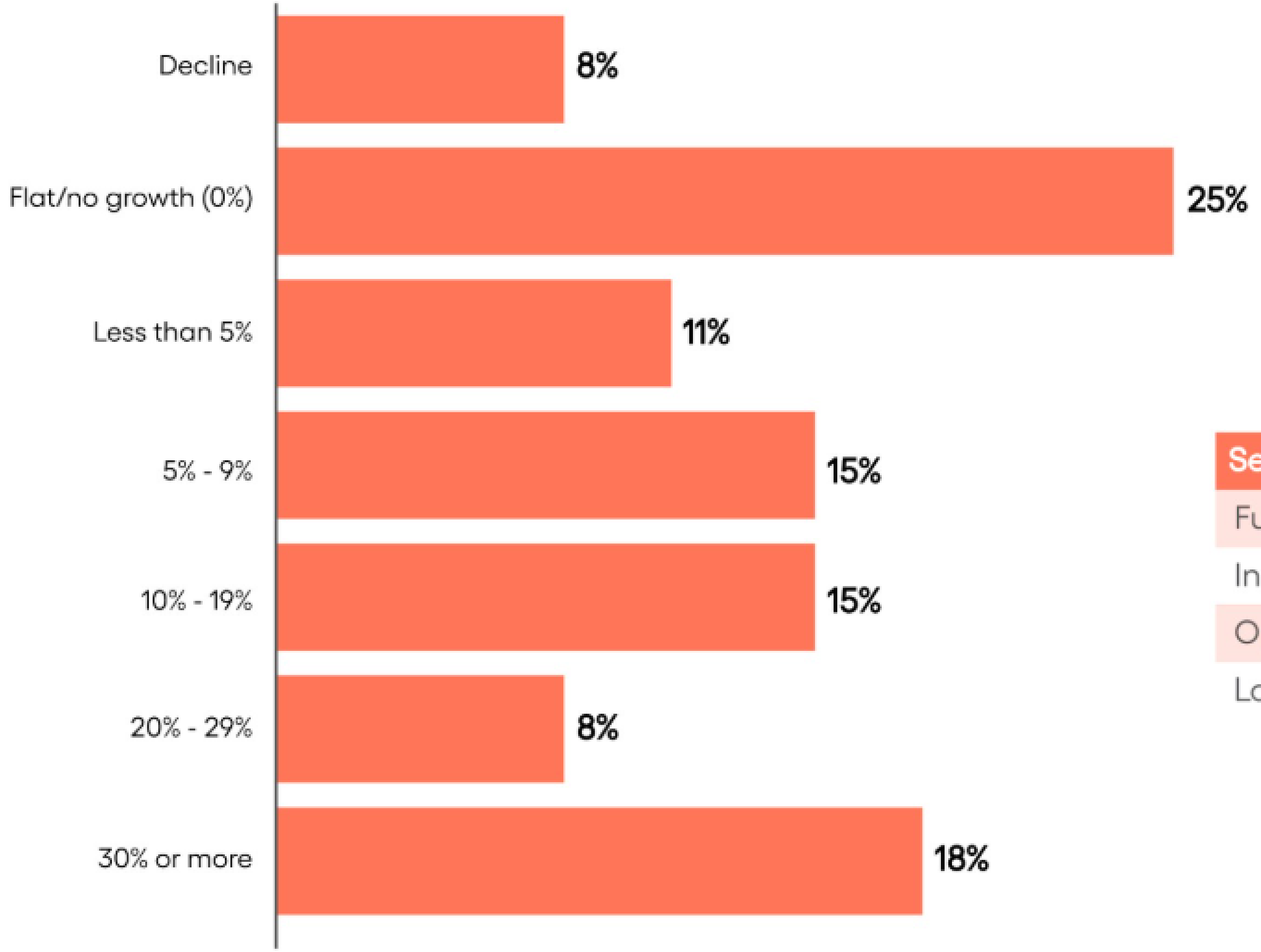
For us at MGM Slots Live, the shift toward Direct-to-Consumer (DTC) was never just about adding a payment method; it was a strategic move to regain control over our margins and player relationships. While we already had a successful DTC foundation in place through our web stores, we realized that to truly scale, we needed to capture player intent at the exact moment it happens – directly within the game flow.

The implementation of Appcharge Payment Links was a turning point. What surprised us most wasn't just the speed of integration, but the lack of friction. Even with a high baseline of existing DTC users, we saw no cannibalization; instead, we unlocked an additional 39% of total revenue through this channel alone, bringing our total DTC share to 60%. Because the checkout experience felt entirely native and secure, players transitioned to direct payments without the psychological barrier of feeling like they were leaving the game environment. This resulted in a peak conversion rate of 80% and a repeat purchase rate exceeding 60%.

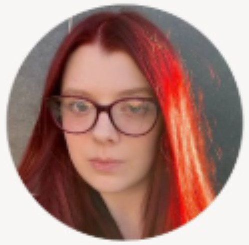
The real impact, however, goes beyond the spreadsheet. By significantly improving our profitability and capturing revenue that would have otherwise been lost to high platform fees, we've created a 'strategic unlock'. This operational efficiency has effectively been converted into investable capital. We are now able to reinvest those margins directly back into MGM Slots Live.

In an evolving market, DTC isn't just an alternative billing solution; it's a growth engine. It allows us to build a more responsive, sustainable business model where every dollar saved from transaction friction is a dollar reinvested into the game.

Approximately how much do you expect your DTC revenue to increase in 2026?



Segment	Estimated Median
Full sample	11%
Innovators	15%
Operators	7%
Late Adopters	7%



APPMAGIC

Industry Insight: DTC Adoption Is Gaining Speed

Alina Zlotnik, Head of Market Insights, AppMagic

DTC revenue across apps is growing rapidly. In the US alone, according to our data, revenue from DTC sources increased by 26% year-over-year.

This revenue growth can already be seen across many major apps. A clear example is MONOPOLY GO!: according to our estimates, more than 30% of the app's revenue has recently been coming from DTC sources, while in mid-2025 this share was several times lower.

We have also started noticing that many large publishers are actively adapting in-game stores to work seamlessly with DTC and webshops. For example, Last War and Dark War Survival recently introduced a special intermediary currency that can be purchased both directly through the App Store / Google Play and through alternative payment methods.

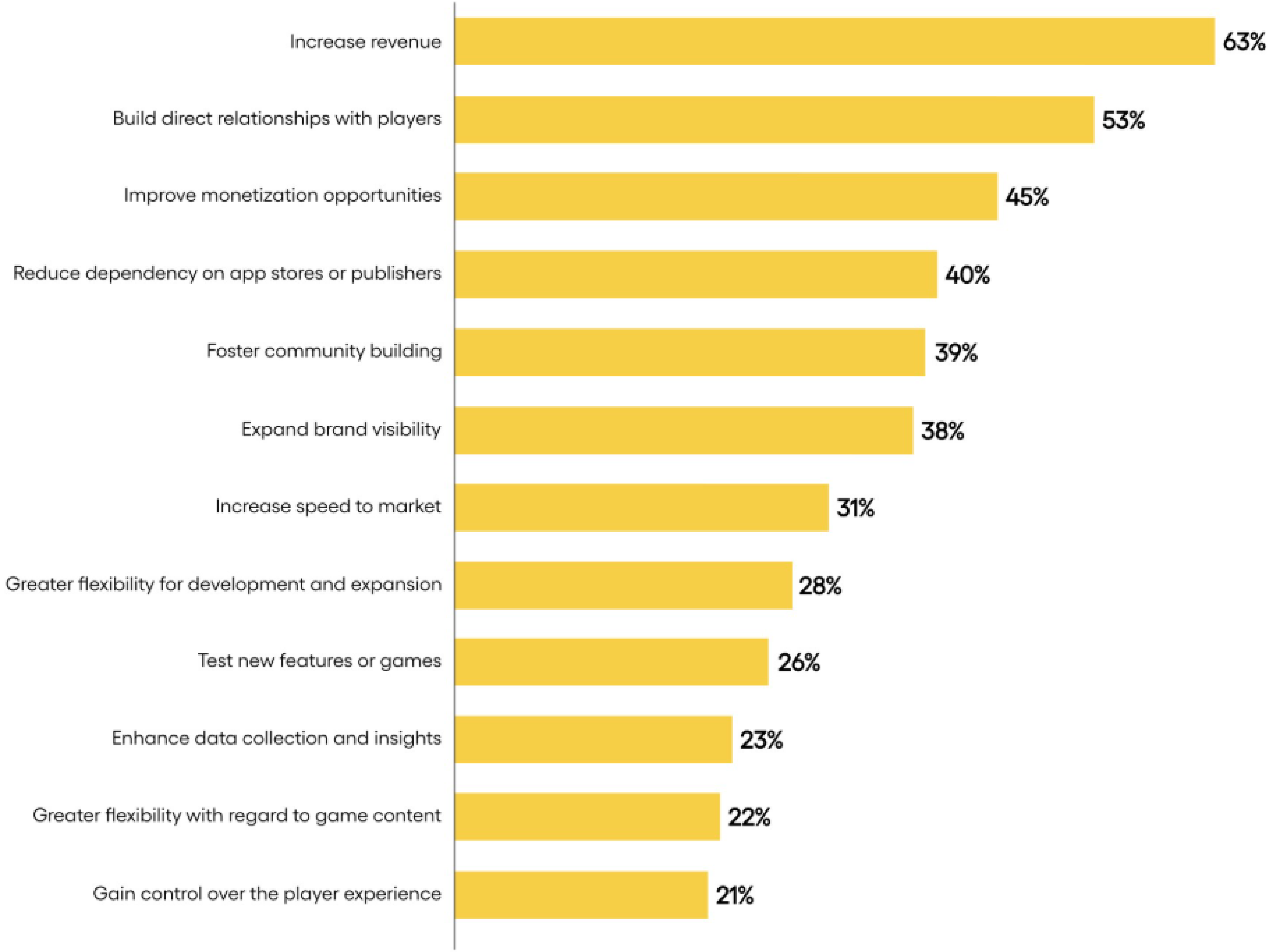
At the same time, we also see that most games are not aggressively pushing users toward DTC purchases. Players can still freely choose the payment method most convenient for them.

Leading adopters are seeing wider business and player benefits

The lack of platform fees means, all other things being equal, each dollar of increased revenue ought to be more profitable for the organization. That expectation is largely bearing out. More than three-quarters of respondents (77%) see their monetization efforts in the DTC channel performing at least as well as their efforts through the app stores.

The more mature a developer's DTC strategy is, the more monetization efforts in the DTC channel tend to outperform the app stores. Nearly two-thirds of leading adopters (63%) say they're making more money out of the DTC channel than through the app stores. Those keeping pace are also more likely to say DTC is performing much better than those lagging behind the industry. Slower adopters are largely seeing the worst relative performance from the channel. As strategies and best practices evolve, performance seems to follow (see sidebar, "How DTC Is Changing the Game").

What are your main objectives for investing in your DTC channel? (Select all that apply.)

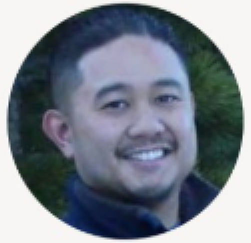


When asked to describe the business benefits in their own words, game industry professionals primarily see DTC as a way to increase margins and revenue by avoiding platform fees. However, revenue and monetization improvements aren't the only DTC objectives for many companies: Developers also see a prime opportunity to build more direct — and deeper — relationships with players.
They see value in gaining direct ownership of customer relationships, data and distribution. Instead of effectively "renting" their user base from platforms, DTC provides opportunities to benefit from stronger direct relationships with users. "Connection with players and their feedback on our projects' insights can help us create more playable games," says one respondent. Another touts "deeper rapport with players, fostering customer loyalty and ongoing relationship building."

Potential related objectives like widening the customer base, targeting underserved segments with more options and cross-selling portfolio games indicate some companies are beginning to view DTC as a growth engine in addition to a revenue and margin amplifier.

When players win, game industry professionals do, too

The DTC channel offers advantages from a player perspective. Reduced fees allow developers to offer better value and pricing. More importantly, however, it can change the way players interact with developers. Direct relationships and deeper community involvement allow developers to offer perks like exclusive and early access to content, faster updates, and more personalized and transparent experiences. As one respondent puts it, "They feel they are part of the development and community and have a direct impact on the product."



tripledot

Industry Insight: How DTC Is Changing the Game

Chris Tabasa, VP Central Game Solutions, Tripledot

With DTC, the dynamic shifts. We're able to build direct relationships with our players, grounded in first party data and supported by much more flexible engagement strategies. That opens up entirely new opportunities, from more personalised offers and targeted campaigns to new touchpoints that extend beyond the app itself.

What's been most important for us is thinking beyond individual web stores and instead building a scalable DTC ecosystem. Rather than treating each game in isolation, we're building a more shared foundation that allows us to apply learnings, optimise performance, and drive more consistent results across multiple titles.

This ecosystem approach means DTC isn't just a monetization channel. It allows us to deepen engagement with our most valuable players and strengthen the player relationship over time. Over time, the real value of DTC isn't just in the transactions. It's in the relationships you build and the long-term player understanding that comes with it. That's what enables more sustainable growth across the portfolio.

A competitive moat is developing

As leading innovators capture revenue gains and improve monetization opportunities, they are also looking for ways to widen their competitive advantage. Those at the top of the maturity curve are pursuing a wider range of objectives in higher numbers than those behind them as they pursue additional areas of potential value (see sidebar, "The Power of First-Party Data").

The industry is generally in agreement on emerging trends that will shape the future of the channel. Growth in cross-platform DTC strategies and an enhanced focus on community-driven development and engagement top the list for obvious reasons: the more users game industry professionals can drive to the DTC channel, the more powerful that channel will be.

More users also means more data that companies can use to tailor experiences. About a third of respondents expect increased use of AI to drive those player experiences in the coming years. About a third also expect expansion of subscription-based models, which appear to be a natural fit for ecosystems looking to nurture community and ongoing engagement while also setting up dependable recurring revenue streams.

AppsFlyer

Industry Insight: The Power of First-Party Data

Adam Smart, Global Director of Product – Gaming, AppsFlyer

From a data perspective, the shift to DTC is creating a clear structural advantage for the publishers moving early.

Higher margins are one part of the story, but the more significant impact comes from direct access to first-party data. When publishers own the relationship with the player, they can build far more sophisticated lifecycle marketing strategies — better segmentation, more precise targeting, and more effective timing across the player journey.

We consistently see that when studios activate direct channels, they unlock higher-value cohorts and stronger retention dynamics. That's because they're no longer relying on aggregated or restricted data — they have a clearer, more continuous view of player behavior, which allows them to optimize engagement and monetization in real time.

Those advantages compound. As more players engage through direct channels, the dataset becomes richer, the models become smarter, and the performance gap versus app store-only approaches widens.

What's being built here is not just a new payment flow, but a data-driven infrastructure layer that connects acquisition, engagement, and monetization. And the publishers investing in that infrastructure now are effectively reshaping how their games will be marketed and monetized over the long term.

DTC, in that sense, is less about short-term margin gain and more about building a durable, data-driven competitive moat.

Building player awareness

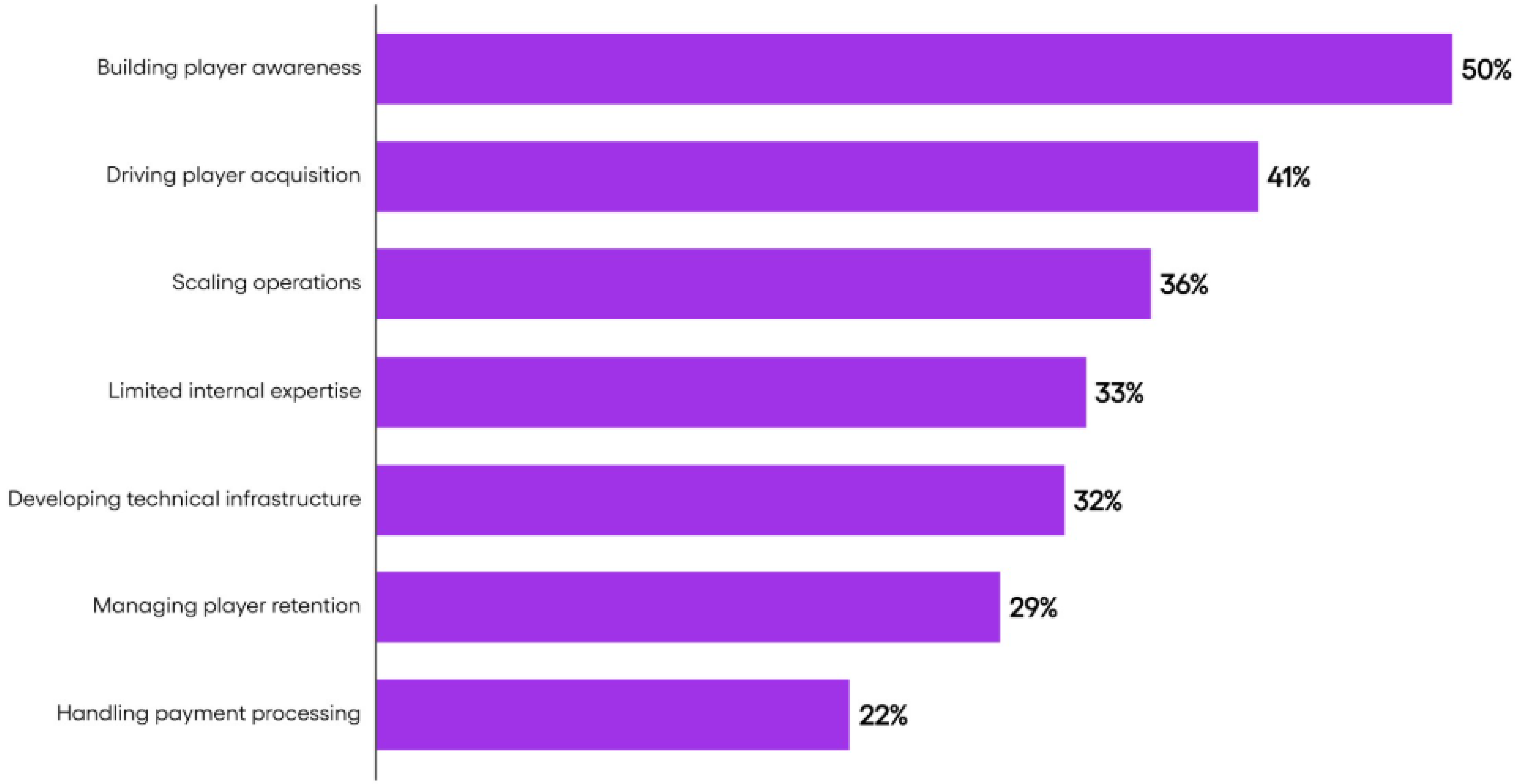
Without a consumer to market to, the DTC channel becomes a dead end. Developers' biggest challenge is getting players to the channel, which requires building awareness that the channel exists and converting potential users once they're there. While DTC solutions can bring many advantages to players, DTC done wrong can move the needle the opposite direction. Commonly cited problems include solutions that create higher friction compared to app store purchases, a lack of resources and expertise to develop the necessary infrastructure, and a lack of trust in the security of DTC payment methods (see sidebar, "Designing for Real-World Complexity").

The most innovative companies have begun to solve for some of these problems. While they remain heavily focused on driving players to the DTC channel, they are much less likely to label player acquisition as a challenge than those who are keeping pace or lagging behind. Alongside their revenue gains, this pattern suggests innovators are seeing success getting more players into — and through — the sales funnel.

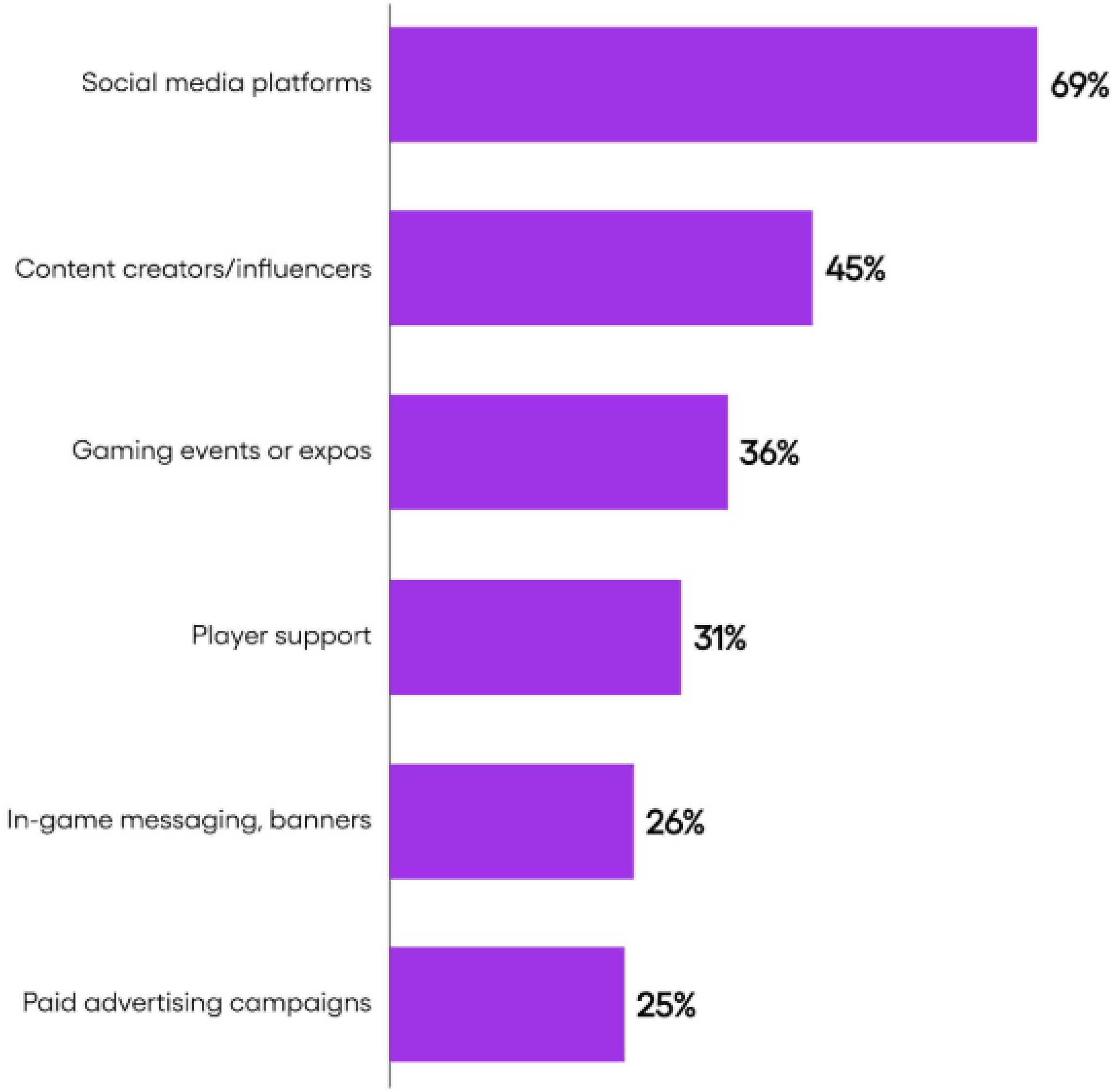
One way they're doing this is through the use of content creators/influencers, whom they use at a significantly higher rate than the rest of the industry. They are also more likely to use in-game messaging to drive player awareness (for U.S. players), which could suggest the development of a more formal cross-platform DTC effort.

Innovators also appear to be addressing the infrastructure shortage by deploying additional resources to their DTC efforts.

What are the primary challenges of scaling your DTC channel? (Select all that apply.)



Which channels are most effective at driving players to your website? (Select all that apply.)



appcharge

Industry Insight: Designing for Real-World Complexity

Amit Porat, CTO, Appcharge

In January 2026, gamers playing *Arknights: Endfield* wound up being mischarged large amounts of money for in-game purchase initiated by other players. The issue wasn't a fraud attack. It was a misconfiguration of the game company's payment system that allowed payment authorizations to be reused across multiple requests — and even multiple users. Lack of experience with payment software can lead to small oversights that carry devastating consequences.

The *Arknights* incident wasn't bad luck. It was a systems problem, and it's the kind of problem we think about every day. When you move payments outside the app store, you inherit everything the platform used to handle. Authorization flows, retry logic, token management, tax calculation, dispute handling across dozens of markets. Most studios have never had to build any of this.

What happened with *Endfield* was a token architecture failure. Player authorization tokens weren't properly scoped to individual users and sessions, which meant they could be reused unintentionally across different requests and different players. Under launch-day traffic, that design flaw became a live incident within minutes. Thousands of dollars charged to the wrong accounts before anyone could respond.

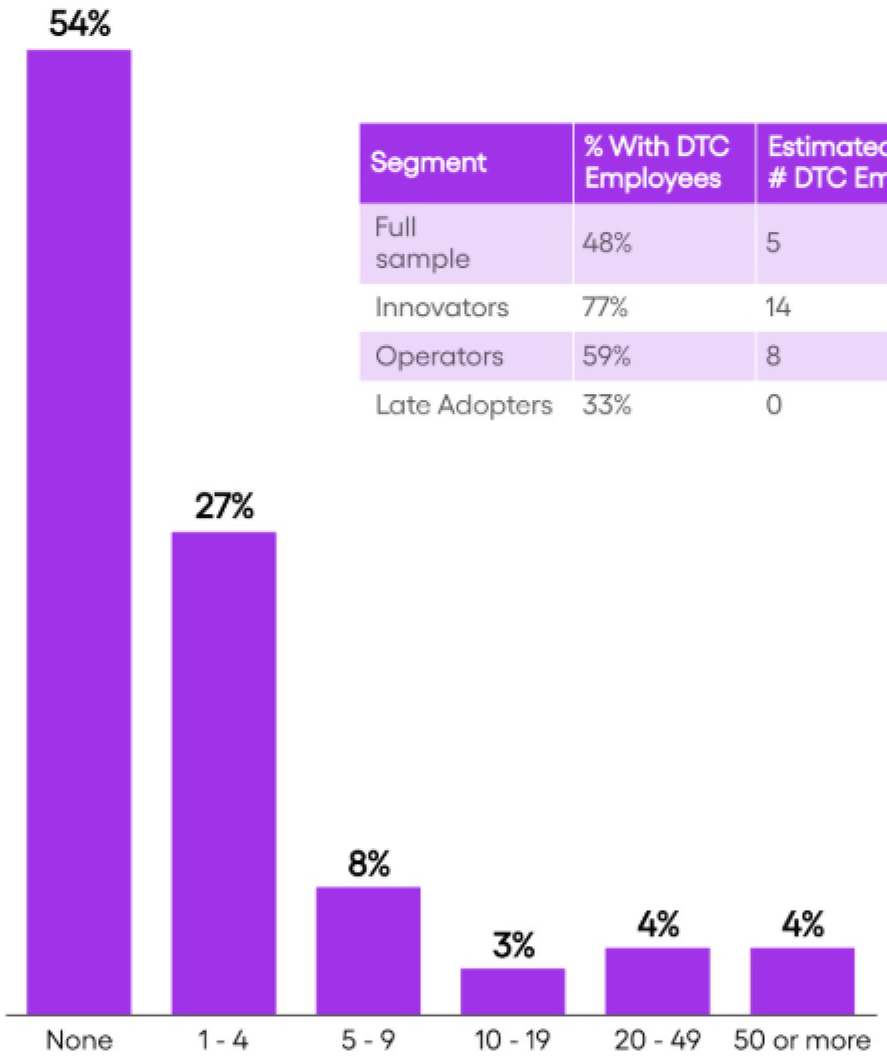
That's the kind of failure that standard functional testing won't catch. It requires concurrency testing under real-world conditions — and most studios aren't set up to run that for payment systems. So it surfaces in production instead, with real players and real money.

We've built Appcharge's infrastructure around this reality. Getting it wrong has real consequences — duplicate charges, failed item delivery, chargebacks, regulatory exposure. In gaming, trust is everything. A payment failure at the wrong moment doesn't just cost you a transaction. It costs you the player.

The studios doing DTC well understand this. They're not trying to build payment infrastructure from scratch on top of everything else. They're focusing on their games and their players, and working with partners who've already solved the infrastructure layer.

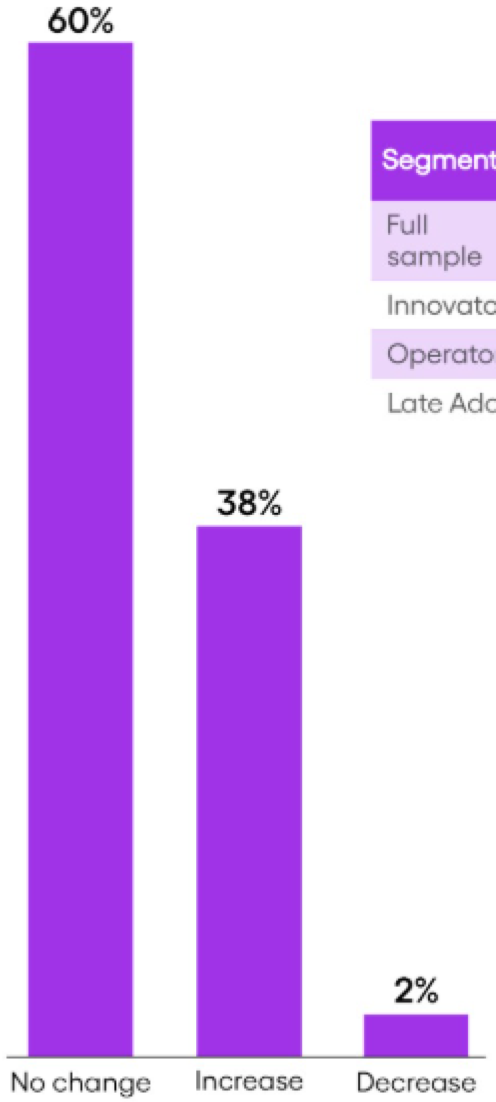
By adding more dedicated employees to DTC teams, developers also are adapting their organizational structures in ways that suggest they are taking DTC strategy seriously. Ultimate accountability for these programs predominantly fall under fairly high-ranking roles: Industry-wide, 83% of companies assign responsibility to an individual at the director level or higher, and 43% make a C-level executive responsible. Typically, these leaders are overseeing functional teams — mainly tech or monetization — or the general manager of a specific game.

How many people at your company are dedicated to DTC?



Segment	% With DTC Employees	Estimated Median # DTC Employees
Full sample	48%	5
Innovators	77%	14
Operators	59%	8
Late Adopters	33%	0

How will that change in 2026?



Segment	% Expecting an Increase
Full sample	48%
Innovators	57%
Operators	34%
Late Adopters	34%

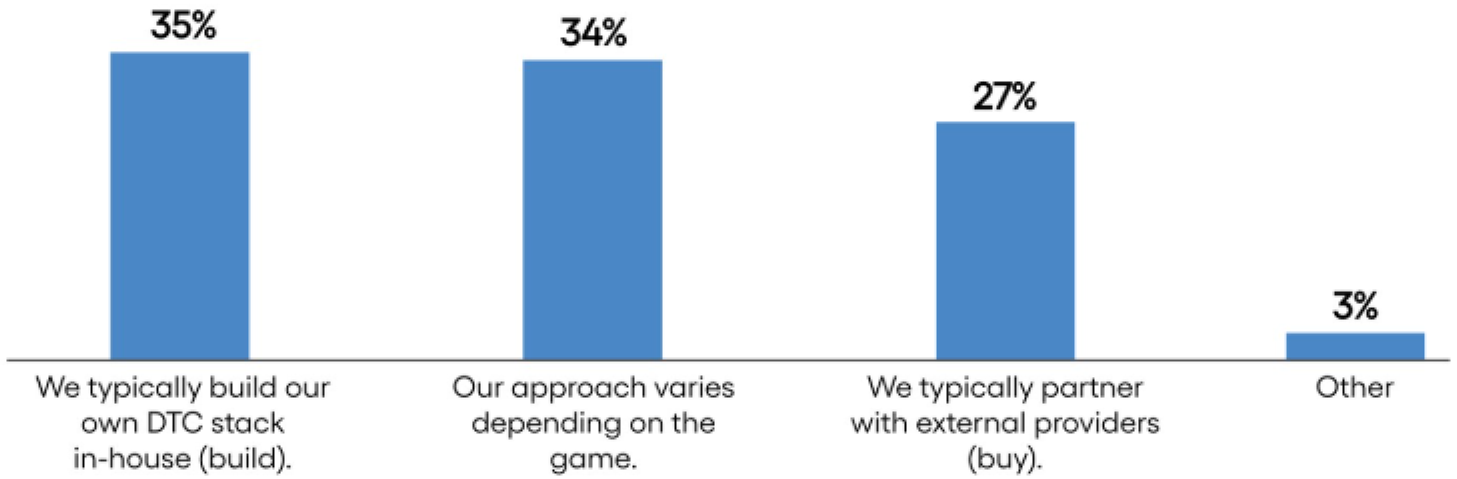
Scale is the next frontier

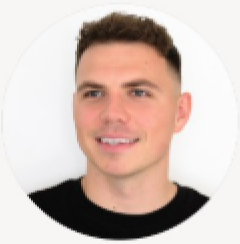
Figuring out how to scale flexibly in the DTC channel could help companies take advantage of opportunities more quickly, as opposed to leaving potential revenue on the table. These companies are more likely to be focused on scaling their DTC operations than those keeping pace with the industry or lagging behind. That continuing hurdle could ultimately be good news for companies not at the forefront of the DTC evolution: Figuring out how to scale flexibly in the DTC channel could provide a way for companies at the low end of the maturity curve to make up a lot of the ground they've lost — and in a hurry (see sidebar, "When You're Scaling, Flexibility Matters").

The data suggests that the structural changes companies have made haven't been enough to support the level of scalability they'd like. Taking another look at their approach to infrastructure suggests a possible reason why.

The potential for partnerships in the DTC space could make expansion more attractive over time. Currently, 61% of developers are at least open to partnering with external providers for some part of their tech stack. Roughly a third (34%) say their approach varies depending on the game. As DTC strategies mature, developers are likely to figure out what they can do efficiently in-house and where it makes more sense to bring in a partner, allowing them to take greater advantage of the flexible opportunities the channel brings.

When implementing Direct-to-Consumer (DTC) tools, what approach do you prefer?





RAGE !%* QUIT GAMES

GAMESTURE

Industry Insight: When You're Scaling, Flexibility Matters

Michal Korek, Executive Advisor at Rage Quit Games and Gamesture

Working with multiple studios on their DTC strategy gives you a useful pattern view: the ones that scale fastest aren't the ones with the biggest in-house teams. They're the ones who decided early what they actually need to own. I've landed on both sides of the build-vs-buy line depending on the environment, and that's the point – DTC isn't one decision, it's a portfolio of decisions about which layers of the stack to own.

The mistake I see most often is treating DTC as a tech project. It isn't. It's a monetization channel that happens to require infrastructure. The build-vs-buy question only makes sense in the context of the whole product environment: what other levers does the company have, where is the product in its lifecycle, what's the team and budget, and where will the next dollar produce the highest ROI across the portfolio.

For one studio, owning the web store end-to-end is the single best lever available. For another, the product is still scaling and the better ROI sits in core game work – here a ready-made solution gets them into the channel fast without pulling focus.

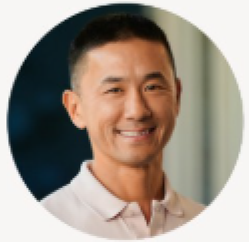
What stays constant is the split underneath: own the player-facing layer – offer design, segmentation, connection to your liveops and economy. Partner on the infrastructure layer – payments, compliance, fraud, global coverage. That's where a strong partner becomes non-negotiable, because the moment friction shows up at checkout, the entire experience collapses.

When I worked on Fishing Clash's web store at Ten Square Games or on scaling Gamesture's DTC portfolio to 70% store-share, the biggest unlock was understanding that a web store has two halves: an extension of the in-game economy and monetization on one side, and a checkout experience frictionless enough that players don't disengage on the other. Get both right and DTC scales. Get one wrong and the rest of the work doesn't matter.

Conclusion

In the game industry, the DTC channel has evolved substantially in a very short time. While improving margins and revenues represent a key benefit for companies embracing the DTC channel, these strategies also are uncovering powerful opportunities to drive operational growth. Industry leaders have demonstrated an ability to improve revenues and drive users into the channel in a way that could produce a snowball effect in the future. If they solve for scale, that growth could become even greater, even more quickly.

The roadmap developing for game companies looking to take advantage of the DTC channel is set to apply to other industries as well (see sidebar, "DTC Beyond Gaming"). If the numbers in our survey suggest DTC captured roughly $17 billion of the $113.3 billion of mobile game in-app purchases in 2025, a similar opportunity exists in the media segment, which pulled in $85.6 billion in in-app purchases over the same period of time.[3] And the opportunities may not stop there. Market research intelligence from DataIntelo valued the global in-app purchase market across all segments at $247.6 billion in 2025 and projects it to reach $721.4 billion by 2034. There's already ample evidence the channel can perform in other sectors as well. McKinsey has found that, across the board, companies with DTC offerings and capabilities grow their share price 30% higher than non-DTC businesses year over year. Owning user data rather than effectively renting it from app stores could benefit other categories where DTC opportunities have previously only existed for the biggest and best-funded companies. Any app developer that could benefit from loyalty and rewards, community engagement, personalized experiences and data-driven lifecycle marketing could follow a similar path.



ivp

Industry Insight: DTC Beyond Gaming

Eric Liaw, General Partner, IVP

The shift toward direct-to-consumer payments will not remain limited to mobile games. Many other consumer apps operate under similar platform fee structures and face similar constraints when attempting to build direct relationships with users. If the gaming industry continues to demonstrate the viability of DTC models, developers in categories such as AI creation, fitness, education, lifestyle, entertainment and other subscription services may follow a similar path. Gaming has historically been one of, if not the, first large-scale proving ground for direct-to-consumer apps. As this method of monetization becomes more prevalent, if parallel trends in other elements of business management (customer acquisition, retention, etc.) hold here, developers in other categories will see the same economic benefits and the shift could extend across the broader app economy.

3. 2026, DataIntelo, "In-App Purchase Market, https://dataintelo.com/report/global-in-app-purchase-market

Methodology

Methodology, data collection and analysis by GDC on behalf of Appcharge. Data collected January 19 through February 25, 2026. Methodology conforms to accepted marketing research methods, practices and procedures.

Beginning on January 19, 2026, invitations to participate in an online survey were emailed to active users of GDC. By February 25, 2026, we had received 1,206 completed survey responses. Of those, 281 respondents reported (1) direct involvement in mobile game strategy and/or decision making at their organizations; (2) manager+ job levels; and (3) organizational progress on the DTC journey. The following analyses focuses on those 281 respondents, 130 of whom also reported their primary professional focus areas include mobile game.

To encourage prompt response and increase the response rate overall, email invitations and survey materials were branded with the relevant brand names and logos to capitalize on user affinity.
The first 100 respondents to complete the survey were offered $/£/€20 Amazon gift card. All remaining respondents were entered into a drawing for one of five $100 Amazon gift cards.

About [GDC] Festival of Gaming

The GDC Festival of Gaming is where the entire B2B games industry comes together. From design and code to publishing, marketing, and investment, it's a place to learn, connect, collaborate, and shape the future of games. For decades, GDC has been the trusted gathering place where games get made. Now, the GDC Festival of Gaming expands that foundation to welcome the entire games business ecosystem — from development tools and middleware to marketing services and distribution platforms.

The Full Games Supply Chain, Under One Roof. This is no longer just a developer conference. Over five days in San Francisco's SoMa district, we're bringing together every role and every stage of game creation — from initial concept through launch and player engagement. Whether you provide development tools, co-development services, marketing solutions, or monetization platforms, your customers and prospects will be here.

About appcharge

Appcharge is the leading direct-to-consumer platform for mobile games — built for game makers, by game makers. Appcharge helps publishers sell directly to their players, boosting profits by 35% and strengthening player relationships and loyalty. As an all-in-one platform, Appcharge provides everything publishers need to go direct: fully branded web stores, gamified offers, global payments checkout, mobile in-app payments SDKs, and more. Appcharge is the fastest-growing mobile game payments platform, powering stores for over one-third of the top-grossing mobile games.

Headquartered in Tel Aviv, Appcharge is funded by IVP, Playrix, Creandum, Smilegate, Play Ventures, and Gillot Capital Partners, and is led by veterans from Rovio, Playtika, and Playstudios. For more information, visit www.appcharge.com.