

Mobile Gaming - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Mobile Gaming Market size is estimated at USD 110.99 billion in 2025, and is expected to reach USD 181.94 billion by 2030, at a CAGR of 10.39% during the forecast period (2025-2030).

The global surge in smartphone adoption, driven by their increasing availability and affordability, is broadening the potential user base for mobile games.

Key Highlights

- The surge in the mobile gaming market is primarily fueled by the global proliferation of smartphones, making gaming accessible to a vast audience. Improved hardware in mobile devices has enabled richer and more immersive gaming experiences. The evolution of mobile internet, especially with the advent of 4G and 5G networks, has paved the way for smooth online multiplayer gaming and faster game downloads.
- According to Ericsson, by the end of 2029, global 5G subscriptions are projected to surpass 5.3 billion, representing 58% of all mobile subscriptions. 5G is set to take the lead as the primary mobile access technology by 2028. Notably, in Q4 2023 alone, 5G subscriptions surged by 154 million, reaching 1.57 billion. In 2023, global smartphone mobile network subscriptions nearly hit the 7 billion mark, poised to surpass 7.7 billion by 2028. Notably, China, India, and the United States lead the pack in smartphone subscriptions. Because of these rising 4G and 5G networks, the market is anticipated to witness high-production-value AAA-quality mobile games.
- The surge of free-to-play games, supported by in-app purchases, has been a significant contributor. This model enables players to enter games without cost, generating revenue through microtransactions. Social media integration and the rising trend of mobile eSports have amplified engagement and community bonding within the mobile gaming sphere. Platforms like Instagram and Facebook have also started to build innovative mobile games to ensure high product differentiation and profit from engaging

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games to augment their overall advertisement strategies.

- Ongoing advancements in game design, coupled with a plethora of genres, guarantee that mobile games appeal to a diverse audience, broadening their demographic reach. These factors collectively are propelling the mobile gaming market's impressive growth.
- In-game purchases, where players buy extra features within games, are a pivotal revenue stream for the mobile gaming sector. The diverse payment options within games further bolster the industry's revenue on a global scale. Cloud gaming services harness vast cloud resources, global content networks, and streaming services to craft advanced platforms for engaging social entertainment. The rise of edge data centers worldwide further fuels the rapid expansion of mobile gaming.
- However, factors like increasing user privacy and security-related issues, along with government regulations regarding vulnerabilities in mobile gaming, can act as a significant matter of concern, further restricting the market's growth throughout the forecast period.
- During the post-COVID-19, there has been a surge in online purchases of mobile games, driving up the market's growth opportunities. Due to this trend, the market is poised for significant expansion throughout the forecast period.

Mobile Gaming Market Trends

Increasing Smartphone Penetration is Expected to Drive the Market

- Increasing smartphone adoption is reshaping the landscape of the mobile gaming sector. With enhanced hardware and advanced graphics features, smartphones deliver a rich gaming experience, attracting a diverse audience from avid gamers to casual players.
- App stores like Google Play and Apple's App Store have made it easier for developers to monetize and distribute their mobile games. These platforms, connected to millions of smartphones, offer developers a broad user base and enable revenue streams from in-app purchases and ads.
- Smartphones facilitate social connectivity, enabling users to partake in multiplayer gaming with friends and a global player base. This social dimension enriches the gaming experience and spurs user engagement, thereby fuelling market expansion.
- Smartphone technology is evolving at a quick pace, enhancing processing power and graphics and integrating virtual reality (VR). This evolution empowers developers to craft increasingly immersive and advanced mobile games, expanding their appeal and driving market expansion.
- As global smartphone ownership rises, the demand for mobile games is set to surge, opening up fresh avenues for game developers, publishers, and industry stakeholders. According to the International Telecommunication Union, as of 2023, there were almost 8.9 billion mobile phone subscriptions worldwide, up from around 8.6 billion the previous year.
- With the rollout of high-speed 5G networks and the introduction of unlimited data plans, the global success of cloud gaming has increased significantly. Given the rising preference for smartphone gaming among most players, the expansion and enhancement of 5G infrastructure, alongside increased services and investments, become paramount.

North America is Expected to Hold Significant Market Share

- North America is a pivotal player in the global mobile gaming arena, boasting one of the world's largest and most profitable markets. With a substantial smartphone user base spanning various age brackets, mobile gaming has surged in popularity. This surge is underpinned by North America's high smartphone adoption rates, robust economic landscape, and strong gaming culture.
- The North American mobile gaming market is poised for growth, propelled by the increasing adoption of 5G technology. With higher data speeds, ultra-low latency, and enhanced availability, 5G is set to revolutionize the mobile gaming experience.

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According to Ericsson, 5G subscriptions are forecasted to increase drastically in North America from 2019 to 2027, from over 232 million to around 353 million subscriptions. With the highest adoption rate of smart devices, this region presents a significant opportunity for market growth, particularly given smartphones' pivotal role in their development. This trend is expected to continue during the forecast period.

- In North America, the mobile gaming sector is highly competitive, as established giants such as Electronic Arts, Activision Blizzard, and Zynga battle alongside a vibrant indie developer community for dominance. This landscape showcases the stronghold of major players and highlights the region's knack for numerous innovative and successful titles emerging from the region.
- The region also possesses a rich array of gaming platforms. Although smartphones reign supreme in mobile gaming, tablets and handheld devices also play a significant role. There is a rising adoption of cloud gaming services in the region, enabling users to play and stream games seamlessly on their mobile devices.
- The North American mobile gaming market features various game genres, from casual and strategy games to role-playing games (RPGs) and multiplayer online battle arena (MOBA) games. Notably, augmented reality (AR) and virtual reality (VR) games have emerged, elevating the gaming experience. Market players are intensifying efforts to expand their consumer base across various industry verticals, bolstering their global presence and service portfolios.
- In May 2024, Netmarble, a developer and publisher of high-quality mobile games, unveiled the global release of Solo Leveling: ARISE across Android, iOS, and PC platforms. In this immersive journey, players delve into a powerful story fueled by beautiful graphics with a dynamic combat system. Players may also craft unique combat styles by tailoring their skills, obtaining more potent weapons, and delving into further customization options.

Mobile Gaming Industry Overview

The mobile gaming market is highly fragmented, with key players including Tencent Holdings Limited, Activision Blizzard Inc., and Nintendo Co. Ltd. These market leaders increasingly turn to strategic partnerships and acquisitions to bolster their product portfolios and secure lasting competitive edges.

- In January 2024, MobileX, a customizable wireless service aimed at saving consumers money, unveiled its first-ever sponsorship of X Games Aspen 2024. MobileX partnered as the exclusive wireless carrier for the world's premier winter action sports event, which was held at Buttermilk Mountain in Aspen Snowmass, Colorado. This collaboration underscores MobileX's commitment to delivering advanced, customizable wireless solutions that mirror the energy and thrill of the X Games.
- August 2023: CineSalon, a burgeoning video production agency headquartered in Washington, D.C., secured a lucrative video marketing contract with Lilith Games, a player in the global mobile gaming industry. This partnership brought together two industry frontrunners dedicated to fostering creativity and driving innovation and success.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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