

GameRefinery
By Vungle

Market Snapshot

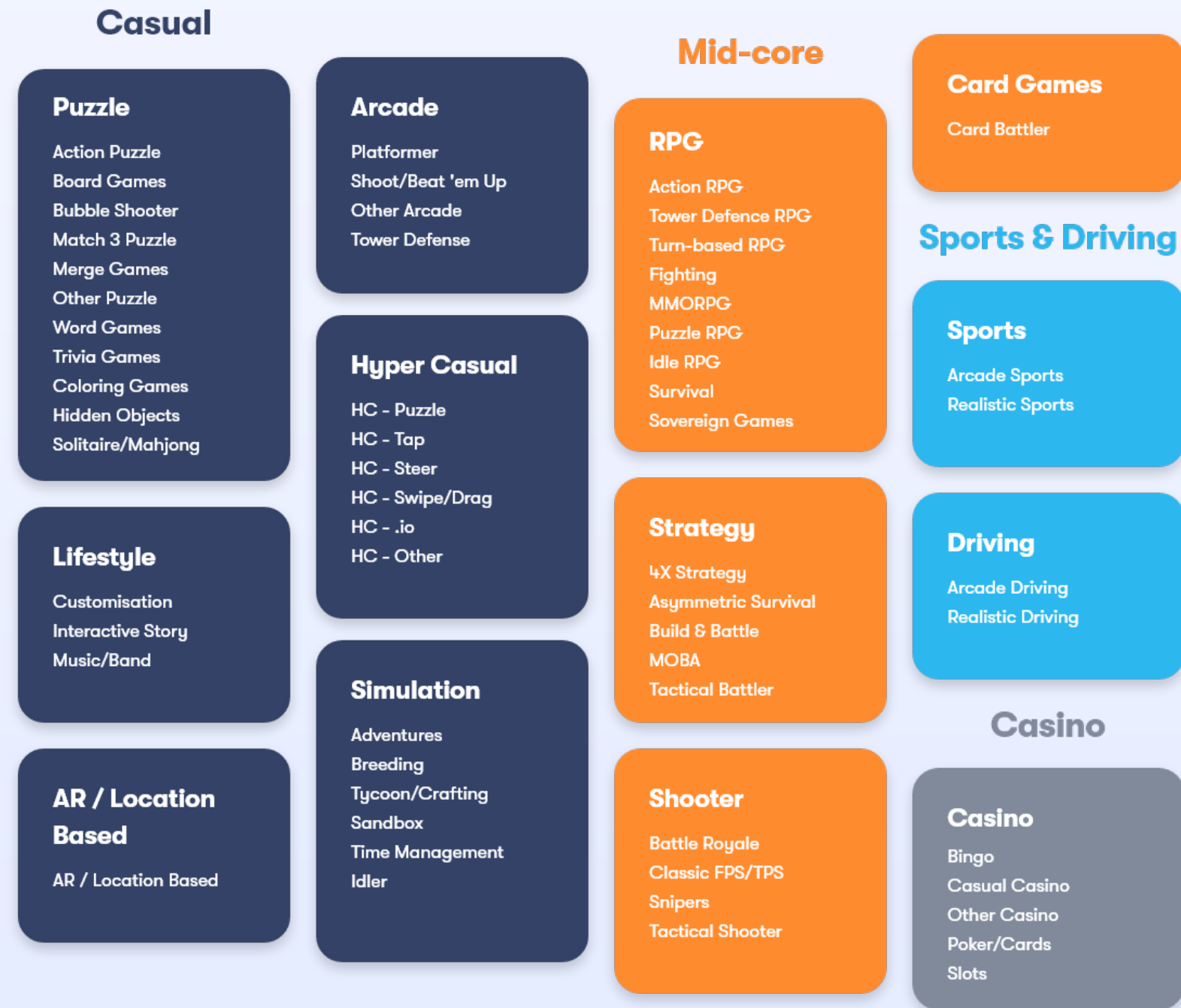
Q1 2021 US, China & Japan

April 2021



GameRefinery uses a three-layered approach to categorize games

- Using a **Category -> Genre -> Subgenre** hierarchy we are able to differentiate games in a meaningful way and offer accurate insights for all individual game types currently found in the market
- Our taxonomy is **created together with industry experts** and is based on thorough testing and data-analysis of the market



GameRefinery's Genre Taxonomy

Short Q1 2021 Market Overview



Joel Julkunen
VP of Games

The broader mobile games market in Q1 2021 looked very similar to Q4 2020, particularly in the US. However, there were some interesting shifts taking place.

Looking at the genre level, we see that in China RPG and Strategy games are starting to lose some of their dominance to other genres. This same trend is also showing in Japan with the slight but measurable decline of RPG market share.

As we expected, Roblox further solidified its top market position to make it the #1 top grossing game in the US market (iOS). We also saw a new breakout game, Cygames' *Uma Musume Pretty Derby* shooting to the top of the Japanese charts. This game, where famous racehorses are reincarnated as girls has a mad premise, but with a wider multimedia franchise spanning mobile, Manga, PC, and TV together with compelling gameplay has earned it a sizeable audience.



Key points



Joel Julkunen
VP of Games



- In the US, no significant changes compared to Q4 last year, Simulation genre continues to show growth. RPG games lost Market Share in Japan while Sports experienced a significant increase in Market share. In China, staple genres RPG and Strategy both saw a significant decline in market share while shooters were clearly on the rise.
- *Roblox Corporation's* dominance continues in the US. Taking the number 1 spot past *Playrix* and *King*. *Magic Tavern* also doing well with the successful launch and sustained performance of *Project Makeover*. *Cygames* rocketed to the top of the Japanese charts with *Uma Musume Pretty Derby* grabbing a solid slice of the market.
- Collectibles Albums have become a staple of top grossing games in the US with over 70% utilization. Battle Passes are starting to gain traction also in Japan with over 25% utilization. The use of Special gacha mechanics in monetization of Top grossing Chinese games is on the rise with over 30% utilization doubling YoY.
- Looking at what player archetypes games in the US top 200 most appeal to, the situation in Q1 2021 looks quite similar to what we saw in Q4 2020 where five archetypes clearly stand out. Archetypes that associate with fast passed action and competing against other players continue their triumph, but we also see a rise of the Skill Master archetype. This indicates an increase of competitive games with emphasis on gameplay skills and good reflexes in the top grossing charts.

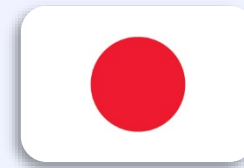
Market

- Genre market share US, JP, CN
- Publisher share and top growth US, JP, CN
- Hot games in Soft Launch worth keeping an eye on



Market performance Q1 2021 vs. Q4 2020 (ios)

Key takeaways: 1) In the US, no significant changes compared to Q4 last year, Simulation games continue to show growth. 2) RPG games lose Market Share in Japan while Sports has a significant increase in Market share. 3) In China, staple genres RPG and Strategy both see a significant decline in market share while shooters are clearly on the rise.



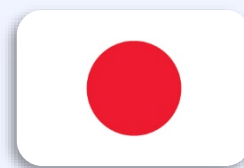
Genre	Rev	Change
1. Puzzle	22.87%	+0.1
2. Casino	19.23%	-0.03
3. Strategy	15.54%	+0.66
4. RPG	13.8%	-0.39
5. Simulation	10.93%	+0.79
6. Shooter	5.32%	-0.55
7. Lifestyle	3.9%	-0.02
8. Sports	3.04%	-0.23
9. AR/Location Based	2.42%	-0.41
10. Driving	1.29%	-0.09
11. Arcade	0.82%	-0.04
12. Card Games	0.49%	+0.08
13. Hyper Casual	0.24%	+0.01

Genre	Rev	Change
1. RPG	48.78%	-2.56
2. Sports	12.28%	+2.7
3. Strategy	9.62%	+0.76
4. Lifestyle	6.96%	-0.32
5. Puzzle	6.76%	+0.07
6. AR/Location Based	4.87%	-0.38
7. Shooter	4.28%	-0.55
8. Simulation	2.35%	+0.08
9. Card Games	1.3%	-0.03
10. Casino	1.15%	+0.3
11. Arcade	0.62%	-0.06
12. Driving	0.53%	+0.08
13. Hyper Casual	0.51%	-0.08

Genre	Rev	Change
1. RPG	45.42%	-2.68
2. Strategy	25.62%	-4.28
3. Shooter	13.26%	+4.2
4. Casino	5.12%	+1.14
5. Puzzle	2.07%	+0.05
6. Arcade	1.97%	+0.68
7. Lifestyle	1.6%	+0.19
8. Sports	1.58%	+0.03
9. Driving	1.43%	+0.19
10. Card Games	1.21%	+0.58
11. Simulation	0.61%	-0.09
12. AR/Location Based	0.05%	-0.01
13. Hyper Casual	0.03%	+0.01

Publisher performance Q1 2021 vs. Q4 2020 (ios)

Key takeaways: 1) Roblox's dominance continues in the US. Taking the number 1 spot past Playrix and King. 2) Magic Tavern also doing well with the successful launch and sustained performance of Project makeover. 3) Cygames rocketed to the top of the Japanese charts with Uma Musume Pretty Derby grabbing a solid slice of the market.



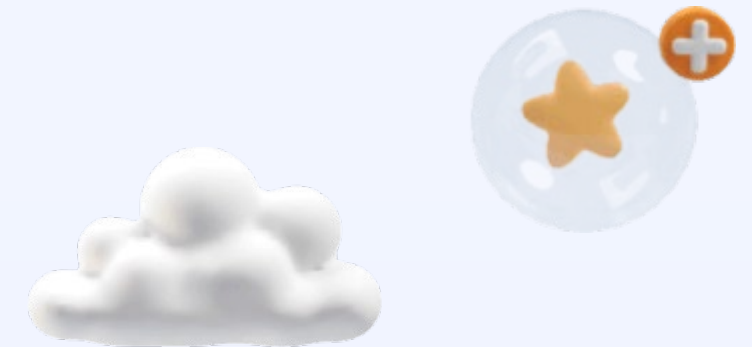
Top Publishers	Share	Change	Most Growth	Share	Change
1. Roblox	5.52%	+0.67	1. Magic Tavern	2.21%	+1.17
2. Playrix	4.74%	-0.49	2. Roblox	5.52%	+0.67
3. King	4.55%	-0.32	3. Topwar Studio	0.8%	+0.52
4. Supercell	2.89%	-0.3	4. 37GAMES	0.6%	+0.33
5. Niantic	2.31%	-0.35	5. Mojang	0.74%	+0.32
6. Magic Tavern	2.21%	+1.17	6. SpinX Games	1.51%	+0.24
7. Scopely	2.17%	-0.05	7. TOP GAMES	0.61%	+0.22
8. Zynga	2.09%	-0.1	8. Netmarble	0.74%	+0.21
9. Playtika	2.06%	+0.05	9. PlayStudios	1.09%	+0.2
10. Peak Games	1.98%	-0.17	10. Huuuge	0.56%	+0.19

Top Publishers	Share	Change	Most Growth	Share	Change
1. KONAMI	8.74%	-0.14	1. Cygames	5.65%	+4.16
2. BANDAI NAMCO	7.44%	+1.09	2. BANDAI NAMCO	7.44%	+1.09
3. SQUARE ENIX	6.88%	-0.62	3. Yostar	1.51%	+0.77
4. Cygames	5.65%	+4.16	4. COLOPL	1.22%	+0.3
5. Aniplex	4.72%	-1.23	5. Magic Tavern	0.42%	+0.24
6. XFLAG	4.7%	-1.41	6. Happy Elements K.K	1.57%	+0.22
7. NetEase Games	4.68%	-0.37	7. DeNA Co	0.97%	+0.2
8. GungHo Online	4.44%	+0.03	8. KOEI TECMO GAMES	0.73%	+0.19
9. Niantic	2.73%	-0.06	9. TAITO	0.18%	+0.18
10. LINE	2.76%	-0.01	10. 37GAMES	0.16%	+0.16

Top Publishers	Share	Change	Most Growth	Share	Change
1. Tencent	41.96%	+0.75	1. Leiting	2.21%	+1.08
2. NetEase	16.39%	+0.97	2. Hainan Lianhong Network	1%	+1
3. Lingxi Games	4.87%	-1.29	3. NetEase	16.39%	+0.97
4. miHoYo Games	3.63%	-1.19	4. Tencent Mobile Games	41.96%	+0.75
5. Shanghai Lilith	2.79%	-1.66	5. Shanghai Zishun	1.01%	+0.66
6. Leiting	2.21%	+1.08	6. Hero Entertainment	0.67%	+0.3
7. Guangzhou Duoyi	1.34%	-0.35	7. Xiamen Woobest Interactive	0.31%	+0.27
8. Perfect World	1.12%	-0.79	8. Tugoo Online	0.54%	+0.21
9. Khorgas Zhifan	1.08%	-0.11	9. Topwar Studio	0.22%	+0.18
10. Shanghai Zishun	1.01%	+0.66	10. Shenzhen Palm Entertainment	0.26%	+0.17

Hot in Soft launch

A few handpicked hot and interesting soft launch games worth keeping an eye on



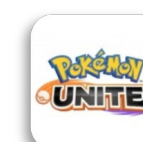
Clash Quest

US top grossing 200 has not seen a new sustained puzzle RPG in a good while, but the newest addition to the Clash universe by Supercell - Clash Quest looks to change this. You take control of iconic Clash characters and send them to destroy enemies while taking into account characters attack patterns and character count. The game is the first in the series of three games that are set to expand Clash universe to new genres.



Tom and Jerry: Chase

Based on the classic IP Tom and Jerry, this asymmetric 1vs4 survival game by NetEase has already seen a couple years of success in China with its Chinese version titled 猫和老鼠. The game brings a mobile-friendly 2D casual twist to the typical mid-corish 3D genre with games such as Identity V and Dead by Daylight. Asymmetric games already have quite a large audience thanks to the hit game Among Us, which similarly to Tom and Jerry: Chase, feature more approachable casual asymmetric PvP gameplay.

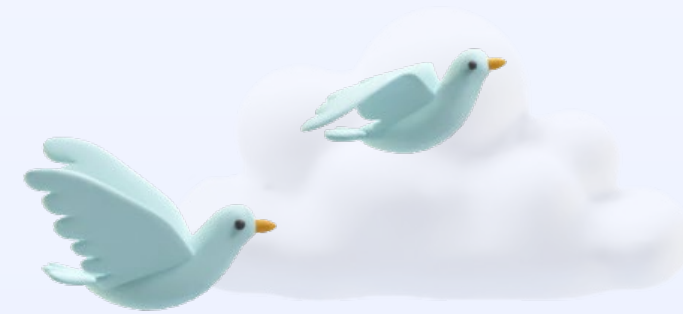


Pokémon Unite

Tencent and Pokémon Company's new Pokémon Unite brings the beloved monsters to the mobile MOBA genre. In the usual MOBA fashion players control a Pokémon in the battlefield, battling monsters and other players while leveling up. The Pokémon IP fits really well to the leveling part, as the Pokémon evolve during the matches. The game also features crossplay functionality with Nintendo Switch.

The recent success of League of Legends: Wild Rift could suggest that there is still room to grow for the mobile MOBA genre when a fitting IP is combined with solid gameplay, which could be the case for Pokémon Unite.





Features Trends

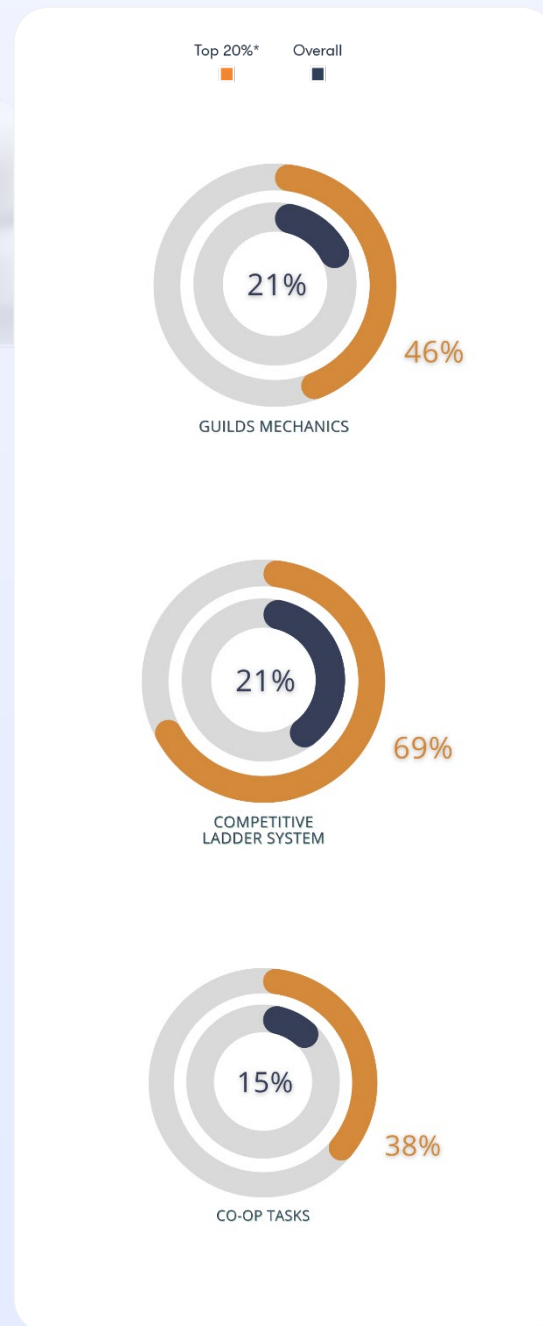
- Must have Social features Puzzle, RPGs, Strategy
- Trending features worth keeping an eye on US, JP, CN

Must Have Social Features

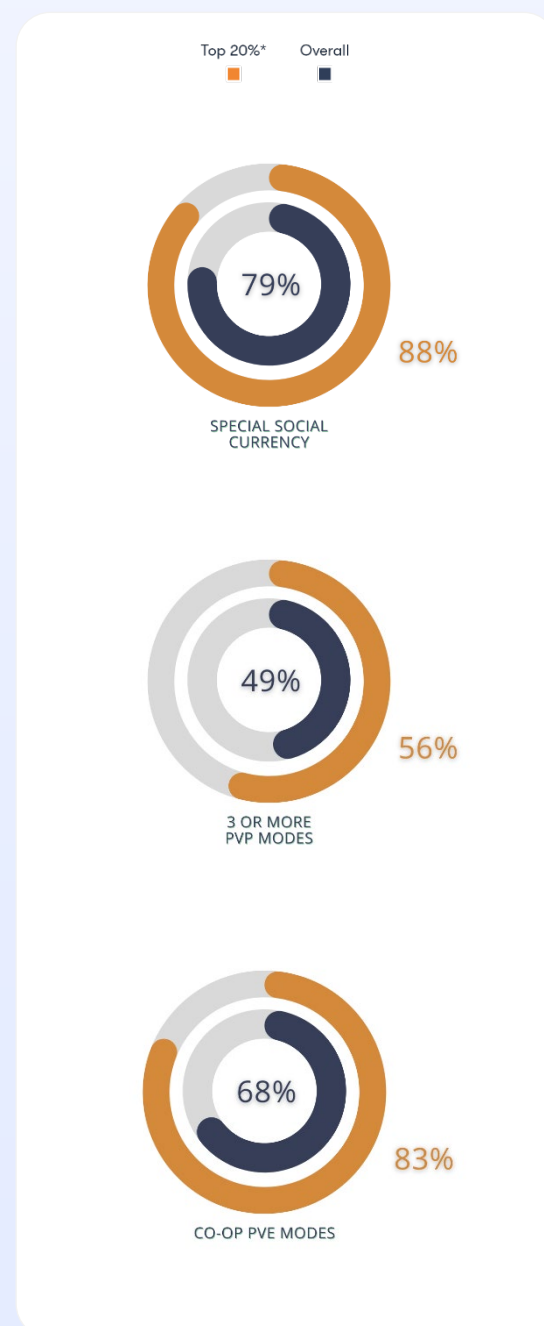


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VP of Games

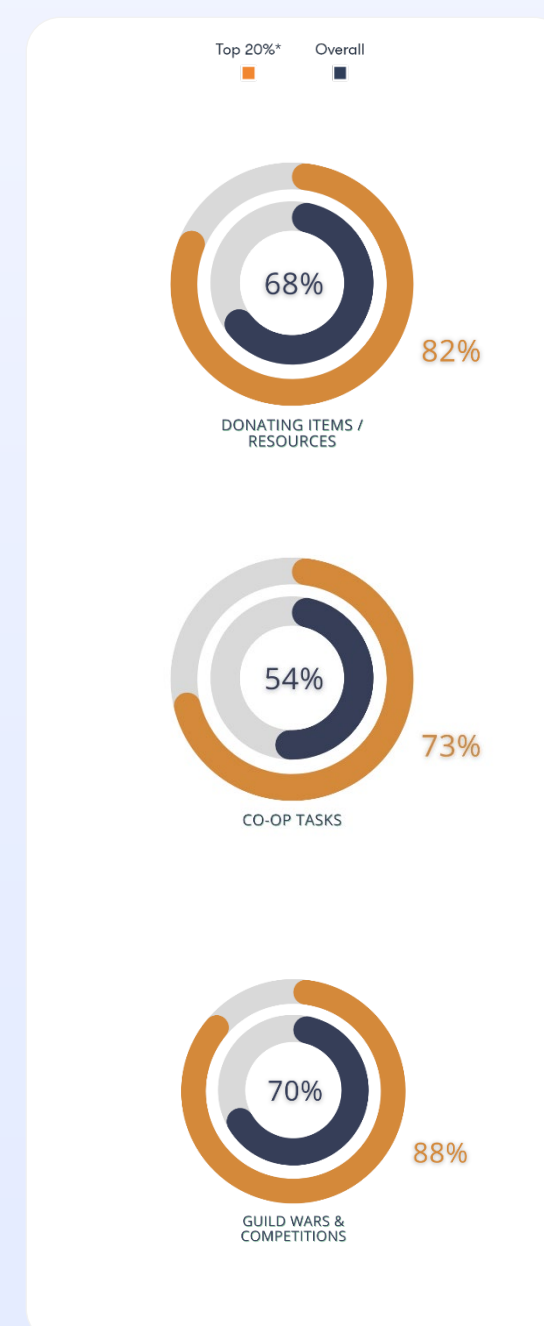
Puzzle



RPG



Strategy



Looking at some of the top mobile game genres, here are some of the most important features to include when planning your game's Social Features.

For example, guild mechanics have become an increasingly important part of boosting social engagement in puzzle games to increase player retention.

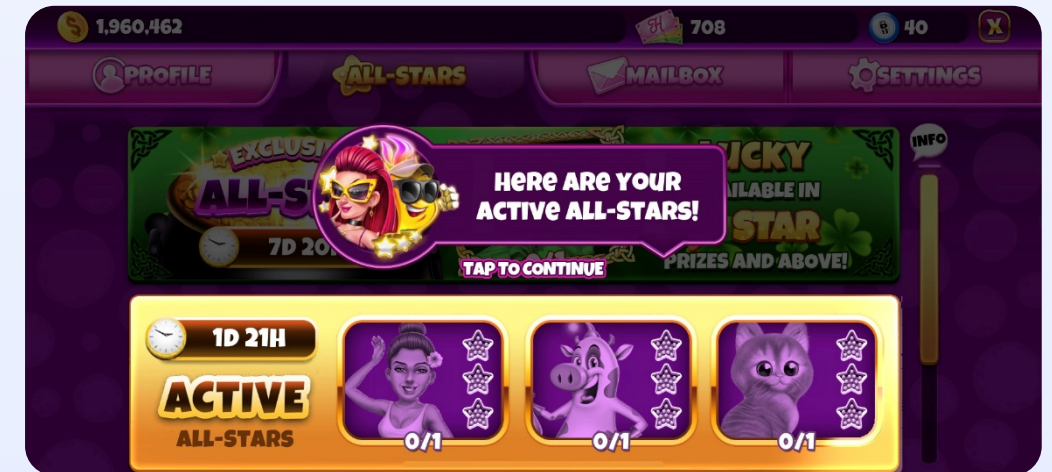
In Midcore titles such as RPG and Strategy games, Co-op modes and activities like Guild Wars are an effective way of getting players engaged with their fellow players and in turn increase player retention and commitment to the game.

* Top Grossing fifth of all Puzzle/RPG/Strategy Games in US, China, Japan



US Trending Feature: Collectibles Album

The popularity of Collectibles albums rose 14% during the past year in the US top grossing 100 games. At 70% of top 100 grossing games utilizing them, collectible albums are extremely popular. The nature of collectibles varies depending on the genre and we've seen almost everything from characters and decorative skins to cards/stickers and accessories.



A growing number of Casino games have started implementing collectibles albums this year. Jackpot Party – Casino Slots is one of the recent ones as it introduced collectible “All Star” avatars with upgradeable looks.

JP Trending Feature: Battle Pass Plan

While still a moderately rare feature in Japan, Battle Pass plan has been slowly making its way to Japanese games as well. It's still mainly found in games created by Western developers, but has also been showing up in originally Japanese. Currently over 25% of Top Grossing 100 games in Japan have Battle Passes, but the trend seems to be going up steadily with 11% increase to the utilization during the past year.



Battle Pass plan with one of the most Japanese backgrounds, a schoolyard with a girl on a school uniform. This example is from a Rhythm game called プロジェクトセカイ カラフルステージ! FEAT. 初音ミク (Project Sekai Colorful Stage! FEAT. Hatsune Miku).

China Trending Feature: Special Gacha Mechanics

During the past 12 months, we've witnessed an increased cadence and usage of special gacha mechanics in Chinese top grossing mobile games. The percentage of games in the top 100 grossing that utilize special gacha mechanics grew from 15% to 30%.

Example titles that have recently experimented with special gacha mechanics include CraZ3 Match (天天爱消除), Canal Towns (江南百景图) and MU Awakening (奇迹: 觉醒)



One of China's top Match3 games CraZ3 Match had a Sugoroku gacha, where players can throw a dice and pass through certain points on a board, receiving all the items they pass by



Motivations

- US Market Top 200 Grossing Archetypes
- Top Archetypes, their motivations and appealing features



GameRefinery's Motivation Framework

- GameRefinery uses a proprietary motivation model consisting of twelve different Motivational Drivers, each covering a separate player root motivation.
- These Motivational Drivers are also grouped based on their nature to form meaningful pairs or “motivational groups” - for example Improving skills and Completing Milestones fall under Mastery.
- Motivation results are based on a survey including over 7000 respondents. The survey was targeted towards mobile game players in English speaking western countries (US, UK, Canada, New Zealand and Australia). The sample is representative of the smartphone users when it comes to age, gender, income and household size.



Social - Working With Others



Expression - Role-playing & Emotions



Social - Competing Against Others



Expression - Customization & Decoration



Mastery - Improving Skills



Exploration - Discovering New Worlds



Mastery - Completing Milestones



Exploration - Collecting Treasure



Management - Strategic Planning



Escapism - Thinking & Solving



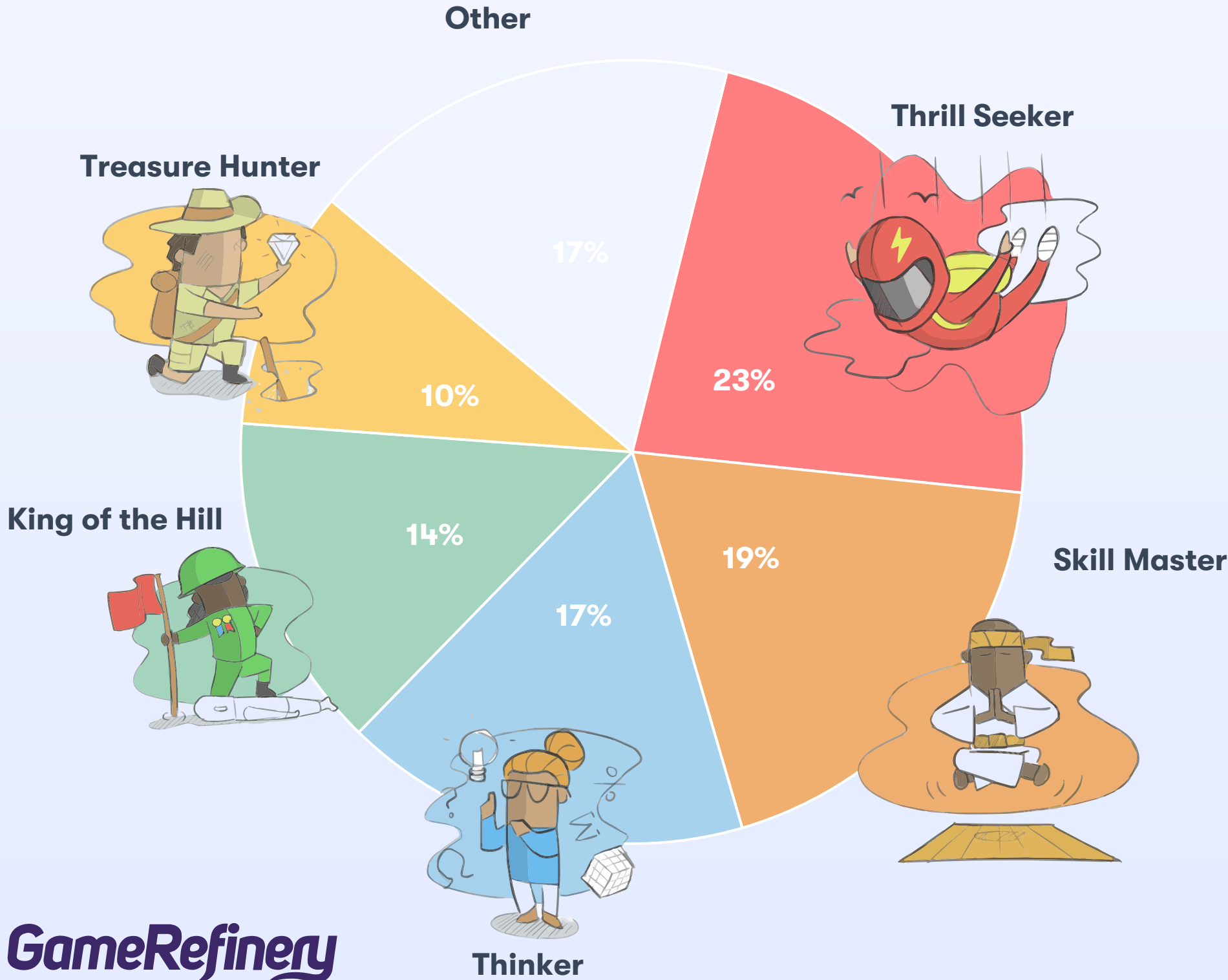
Management - Resource Optimization



Escapism - Excitement & Thrill



Player Archetypes and Motivations US Market Q1 2021



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VP of Games

Looking at what player archetypes mobile games in the US top 200 most appeal to, the situation in Q1 2021 looks quite similar to what we saw in Q4 2020 where five archetypes clearly stood out.

Archetypes that associate with fast passed action and competing against other players continue their triumph, but we also see a rise of the Skill Master archetype. This indicates an increase of competitive games with emphasis on gameplay skills and good reflexes in the top grossing charts.

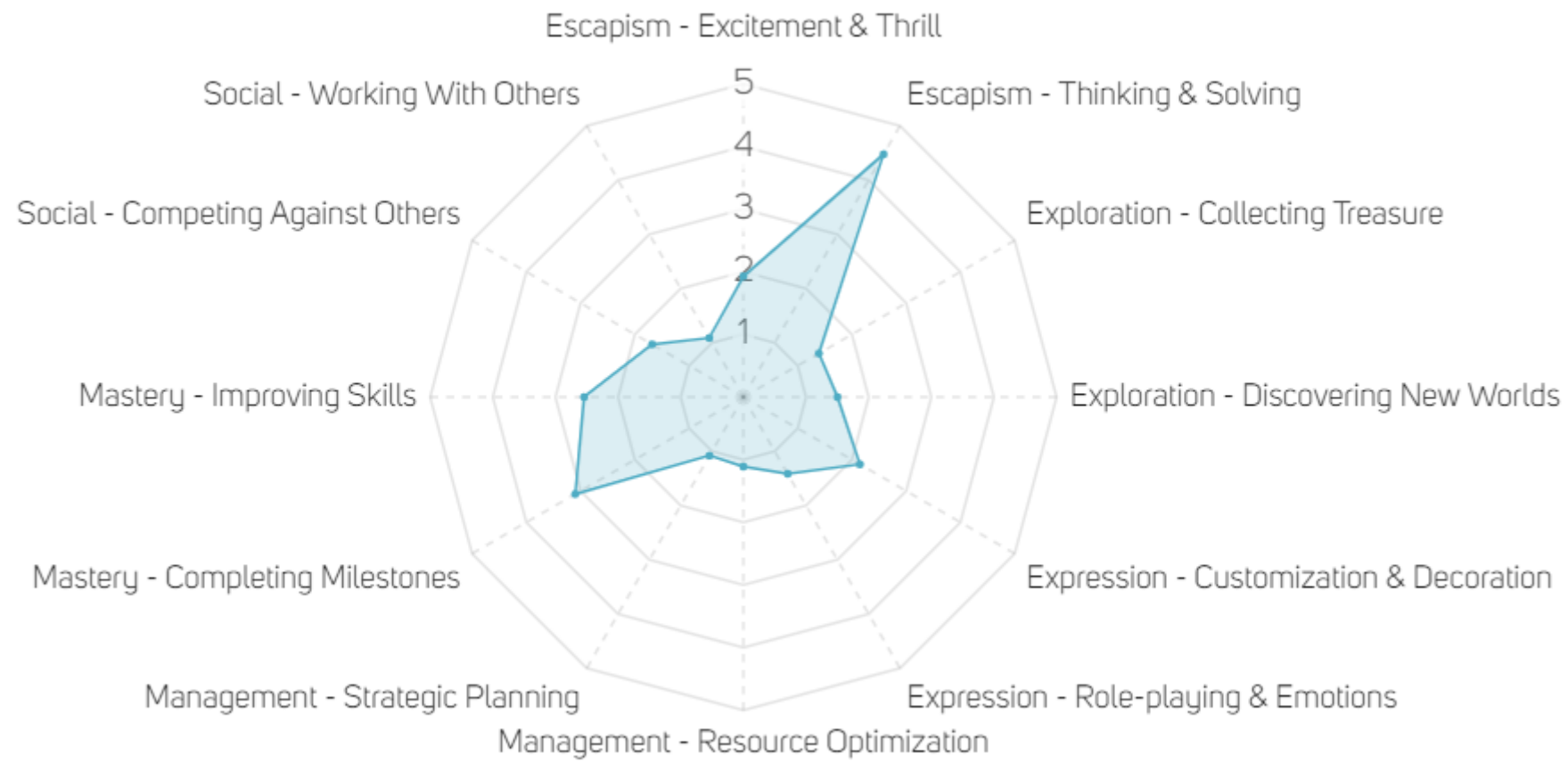
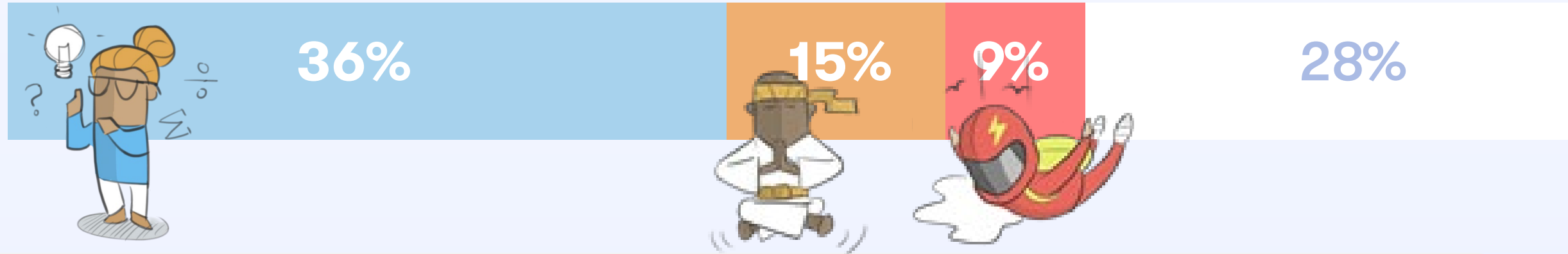
Puzzle

Thinker

Skills Master

Thrill Seeker

Other



Appealing Features

High # of piece types 🏆🏆🏆🏆🏆

High # of level goals 🏆🏆🏆🏆🏆

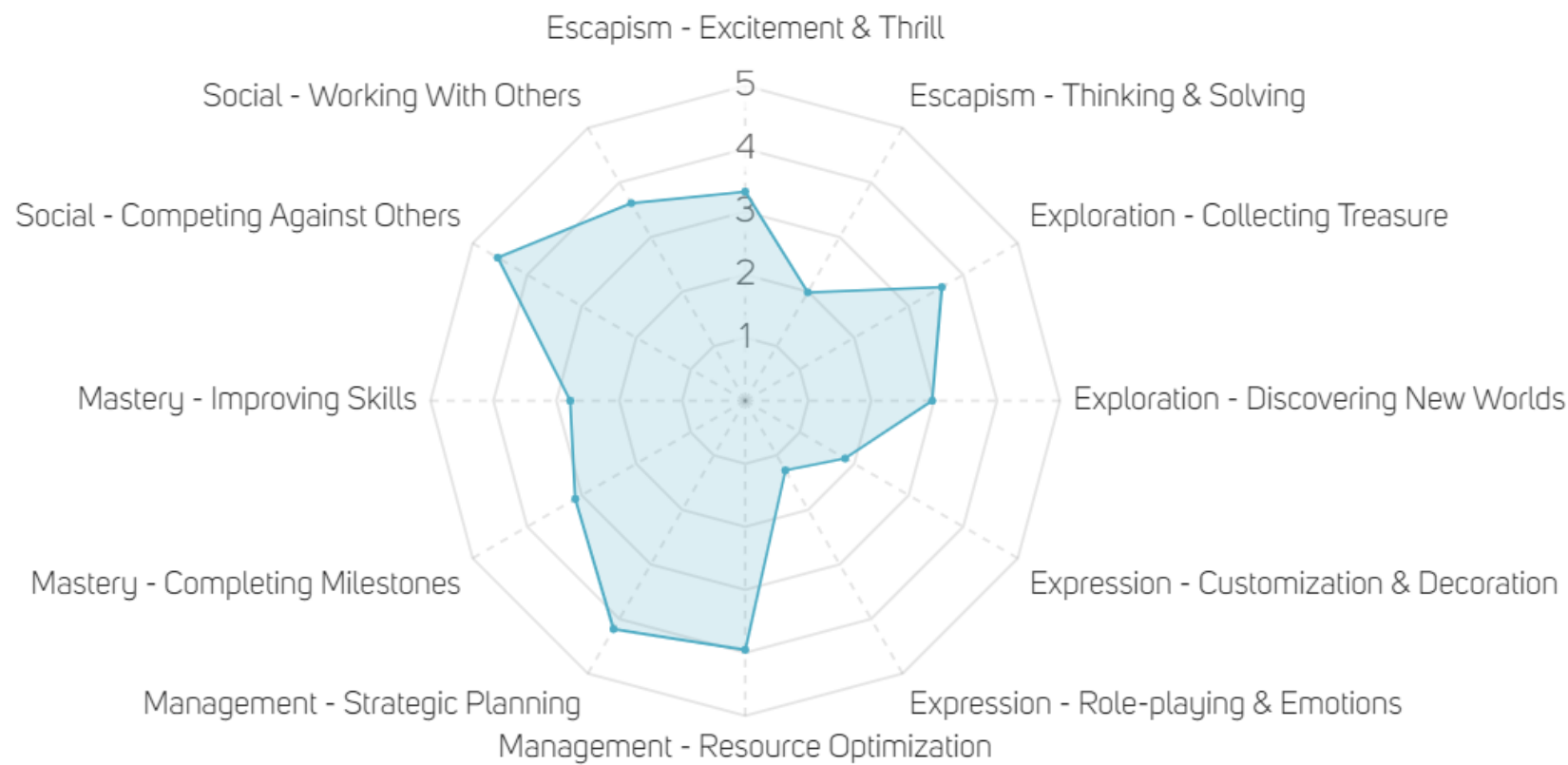
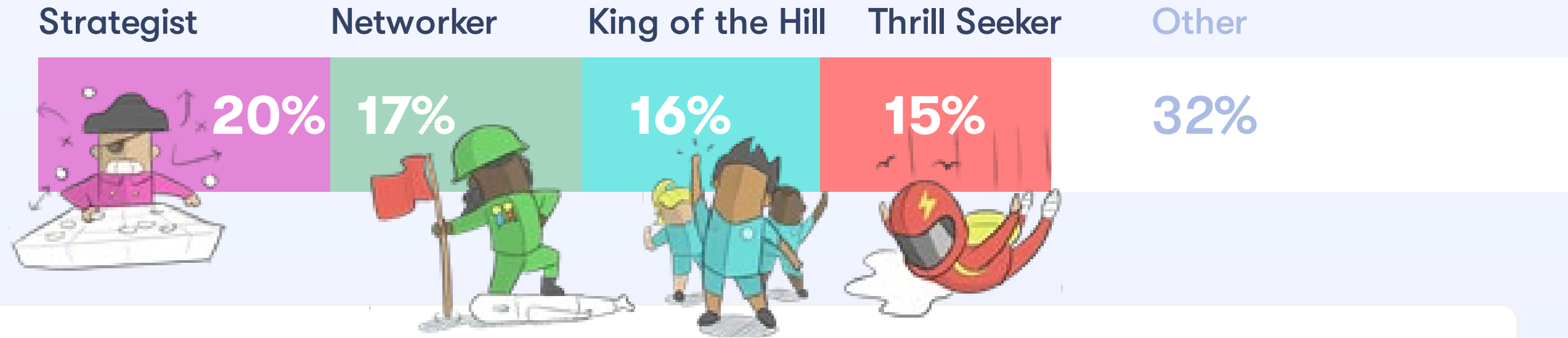
Special level mechanics 🏆🏆🏆🏆🏆

Task/Quest system 🏆🏆🏆🏆🏆

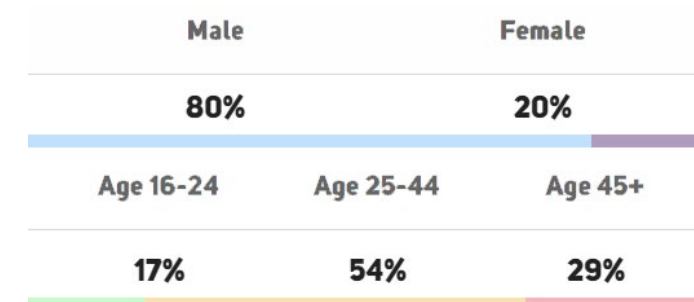
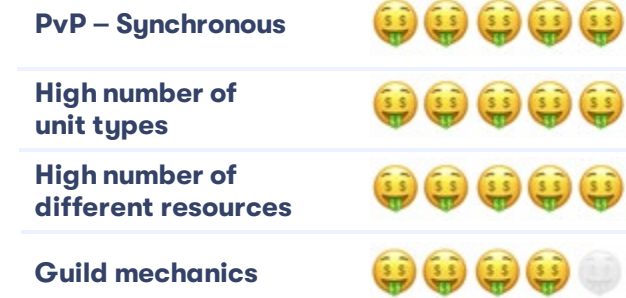
	Male	Female
	37%	63%
Age 16-24		Age 25-44
11%	52%	38%

Key takeaways: Puzzle game players mainly fall under the thinker archetype and features that add variation and complexity to puzzle gameplay appeal to this type of player. Women between the ages of 25-44 are the primary audience for these types of games.

Strategy

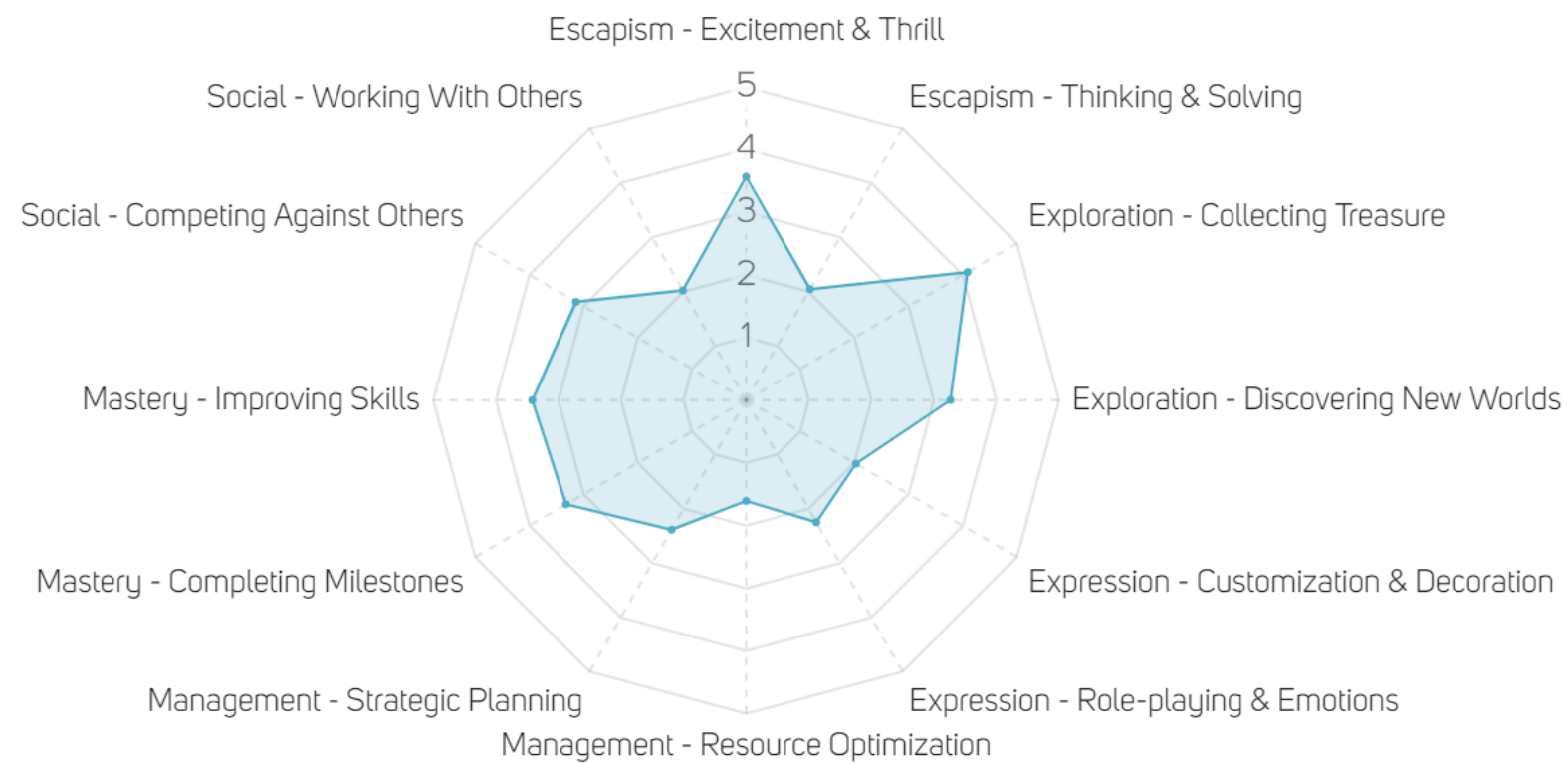
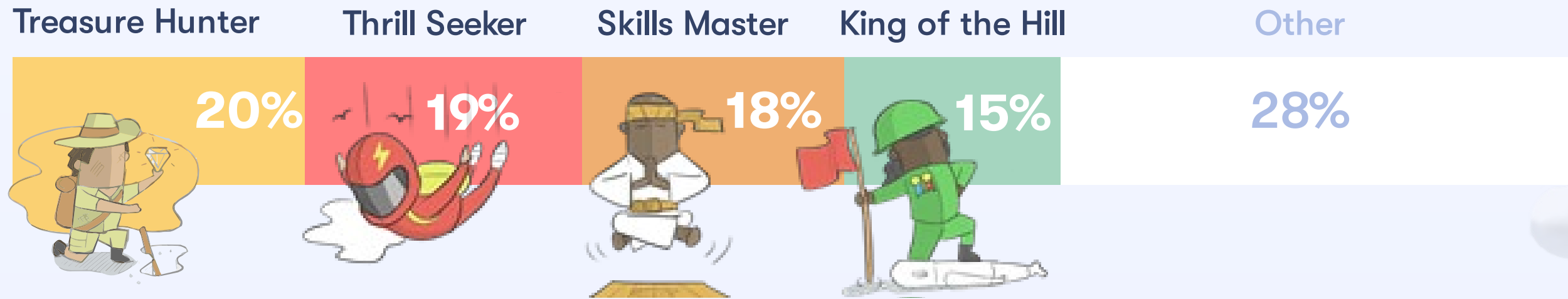


Appealing Features

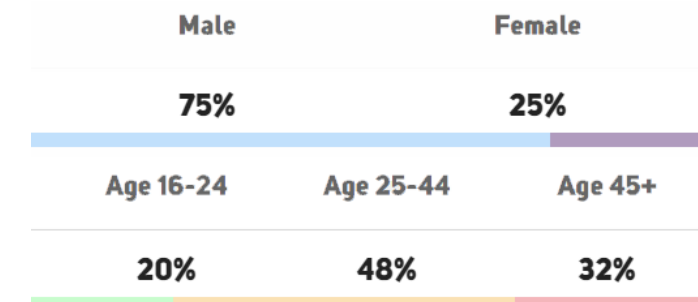
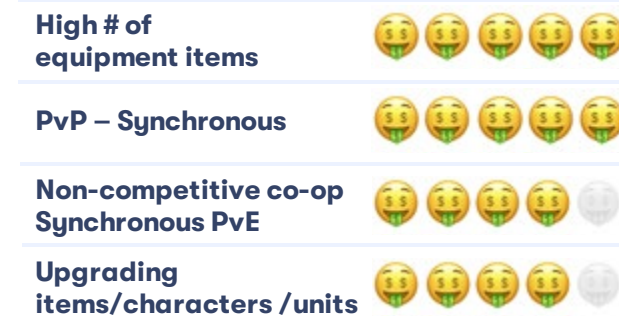


Key takeaways: Strategy games appeal to a wide range of different player archetypes. Competitive features such as PVP and co-op mechanics like guilds that allow players to work together are important along with features that add variety and complexity to building your forces. Men between the ages of 25-44 are the primary audience for these types of games.

RPG



Appealing Features



Key Takeaways: RPGs appeal to a wide range of player archetypes and motivations, especially to players who want a sense of adventure and excitement. Features that allow players to collect and upgrade items & characters are especially important along with mechanics that allow players to either compete or work together with other players. Men between the ages of 25-44 are the primary audience for these types of games.



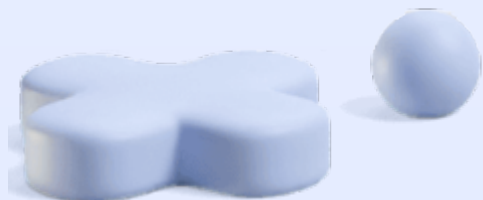
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You can also schedule a live demo by contacting yours truly at joel@gamerefinery.com

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GameRefinery
By Vungle

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Gacha Tap & Monetization
Live Events Appointment Mechanics

Clash of Clans
Supercell
Build & Battle

FEATURE INDICATORS
Powerscore 82
Skill Thinking

MONTHLY PERFORMANCE
Average Grossing Rank 10
Average Download 195K
REV / DL \$30.1

12 Player Motivations

