

Mobile Game Market Review November 2023



Even as we near the end of another year, mobile game developers continue to surprise us with experimental approaches to their live events. Most notably, we saw a number of midcore titles locking exclusive event content behind paywalls, including Free Fire, State of Survival, and Last Fortress: Underground.

Of course, the casual market also got in on the action. But events on that side of the market were repeats of what we've seen before, with many titles looking to the hugely successful Royal Match for inspiration. Namely, two of its most successful event types that first launched earlier this year, the "Social Win Streak" and "Digging Minigame," have started cropping up in everything from Monopoly GO! to BTS Island.

But Royal Match isn't the only trendsetter on the market right now, with the massive success of Triple Match 3D seemingly pushing an entire subgenre into the spotlight. More specifically, November saw two new match 3D games enter the top-100 grossing, while King and Spyke Games launched their own match 3D spin-offs of Candy Crush and Tile Busters.

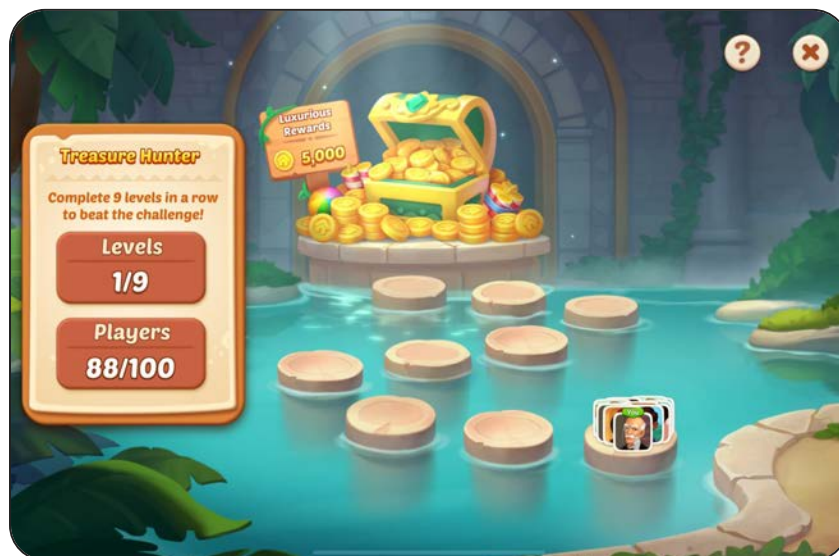
We also can't forget the global launch of Warcraft Rumble, which saw it shoot to the number one download spot in the US. You'll find more information on that, as well as all the other major updates that landed this November, right here.

November's casual mobile game updates

If you've been keeping a close eye on our [Live Events Tracker](#), you'll already be well aware of the growing number of different event types across the casual market. That trend was particularly prevalent during November, with two exciting additions making their way into a multitude of titles.

The first of which is what we've termed the "Social Win Streak." In this battle royale-inspired mode, players are put into large groups (usually around 100 users) and tasked with individually completing a back-to-back assault course of levels. If a player fails a level before reaching the end, they are knocked out of the event, while those who make it to the finish line get an equal share of a grand prize pool. Players who fail must wait a set period, typically around 30 minutes, until they can re-enter. Those who win can also usually have another go the following day.

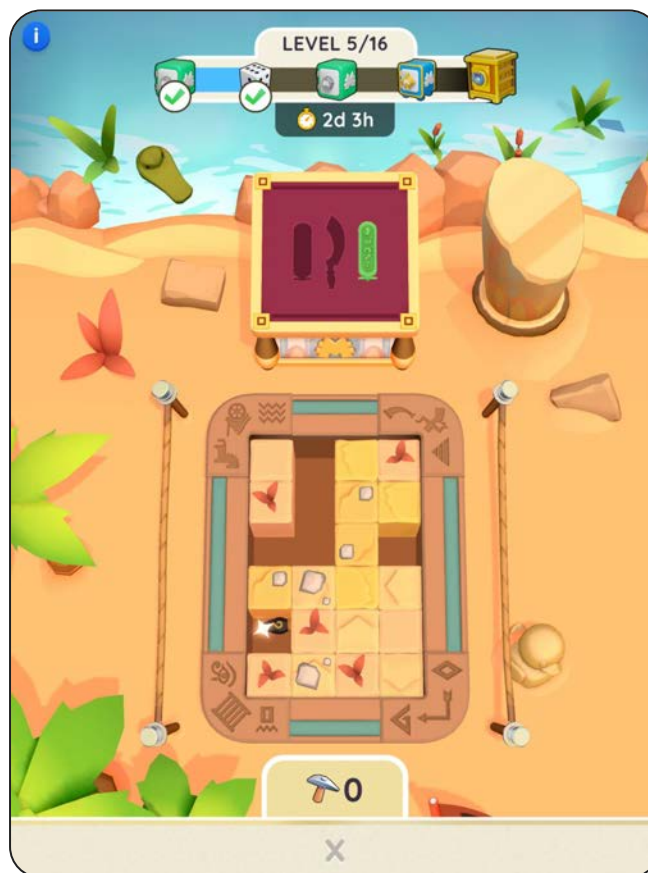
These Social Win Streak events were first introduced in Royal Match in March 2023 as part of the [Lava Quest](#), but they've now begun to creep into several other games. These include [Matchington Mansion's Treasure Hunter](#) event and [BTS Island's Mud Race](#), which were both almost mechanically identical to Lava Quest and offered up in-game currency as a shared reward.



In Matchington Mansion's Treasure Hunter event, all players who can reach the destination share the Treasure Chest equally.

The second event type that appears to be growing in popularity is the “Digging Minigame.” In these events, players face a grid resembling a dig site made up of several pieces. By playing the main game, players can earn a mining pick (or similarly named equivalent), which they can use to dig their way through part of the grid and uncover valuable in-game rewards.

Once again, this event type [started in Royal Match](#), which appears to have become a source of inspiration for other casual games. The games that hopped on the trend in November are Monopoly GO! with its [Egyptian Treasures](#) event and Chrome Valley Customs with its [Crusher Carnage](#) event. Both new additions follow the same standard template laid out by Royal Match back in June 2023, although Chrome Valley Customs ditches the historical theme for a scrapyard, which is more in line with its overall garage-themed aesthetic.



Monopoly GO’s Egyptian Treasures is an event where you reveal artifacts from a grid with pickaxes to earn rewards.

On another note, Stumble Guys joined the growing list of top-performing games utilizing user-generated content with the new Stumble Workshop, allowing players to create and share their own maps for use in private game modes.

The map creator features work similarly to those in other popular games, including [PUBG Mobile](#), [Free Fire](#), and Stumble Guys' Chinese competitor [Eggy Party](#). Scopely [has stated](#) they intend to update and expand upon the feature, but there are already a number of different objects players can use to create their own innovative race maps.

During November, Stumble Guys also had an extensive collaboration with Spongebob Squarepants that included various unique limited-time modes, offers, and gachas.

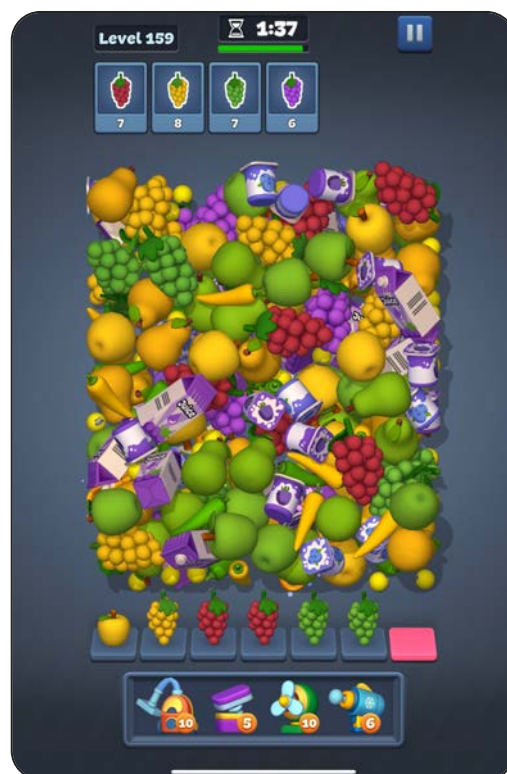


Stumble Guys' Spongebob collaboration event.

Additional casual gaming highlights and other news

Following the massive success of Triple Match 3D, several new titles in the 3D match subgenre have entered the market and shot straight into the top-grossing 100:

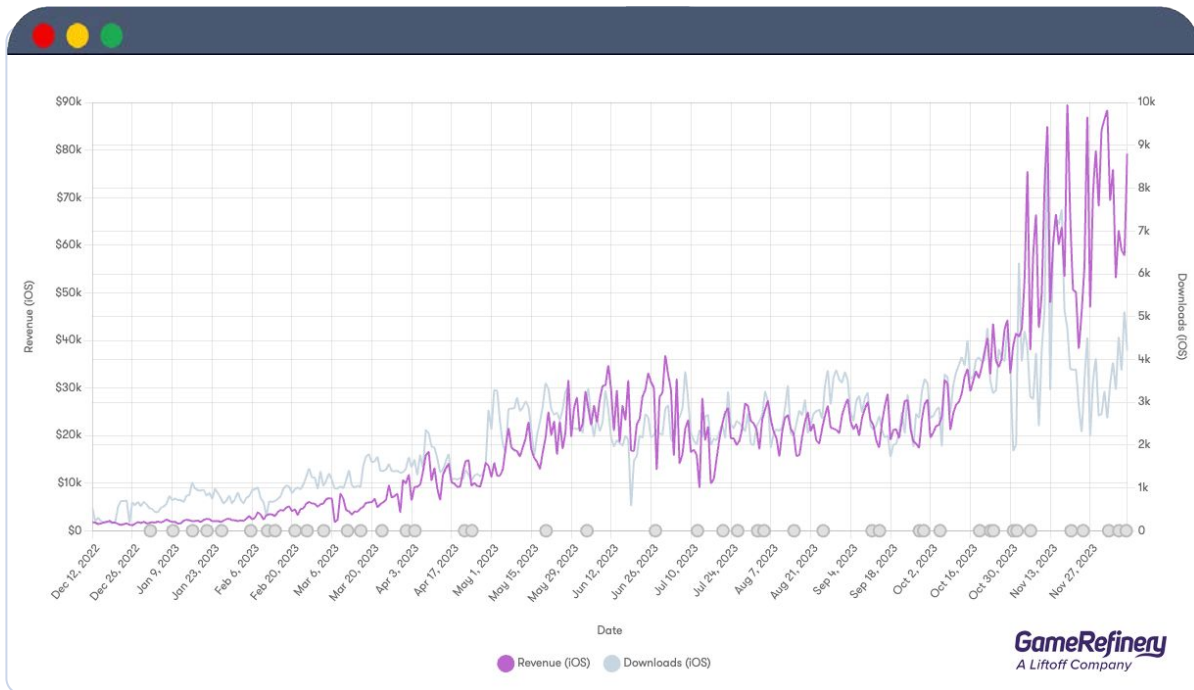
- ◆ [Match Factory](#), a polished 3D match game from Peak, launched worldwide at the beginning of November and scaled throughout the month. It has reached the top-grossing 100 in the US.



Match Factory

- ◆ King announced plans to make its mark on the subgenre with the new soft launch game [Candy Crush 3D](#).

- ◆ Spyke Games, the makers of Tile Busters, also launched its 3D match spin-off [Blitz Busters](#) last month. Currently, it's going through a shadow launch, with the title yet to scale and UA close to zero. It's worth noting that Tile Busters already has "daily 3D match levels," but this is the central focus in Blitz Busters.
- ◆ Another example is [Tile Match 3D](#) from Mojoly Limited. This game launched back in 2021, but the genre's rising popularity saw downloads jump during November. Revenue increased shortly after, with the game peaking at around the top-grossing 70.



Tile Match 3D has been steadily improving in performance over the last year, but the most significant surge occurred around October and November.

Following its global release in October, Nintendo Switch players all over the world have been enamored with a quirky watermelon game called [Suika Game](#). In fact, it's proven so popular that Google ranked it as [the seventh most searched-for video game term in 2023](#). Mobile game developers appear to have been taking notice, with a number of clones entering the market that have rapidly been climbing up the download ranks over November, including:

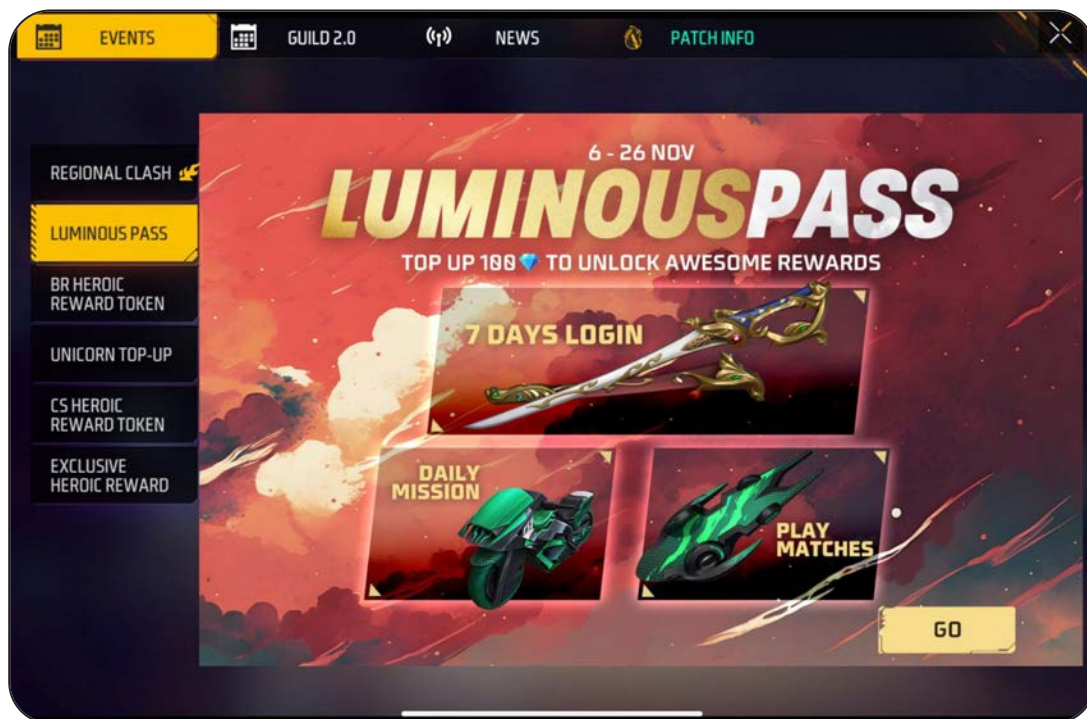
- ◆ [I want Watermelon](#), DL 46
- ◆ [Watermelon 3D: Fun Merge](#), DL 158
- ◆ [Fruit Merge - Watermelon Game](#), DL 166
- ◆ [Fruit Merge Watermelon Game 3D](#), DL 25
- ◆ [Watermelon Game: Monkey Land](#), (not in sustained DL ranks, but did once hit DL 200)

November's midcore game updates

Free Fire launched a new limited-time event only accessible through a paywall called the [Luminous Pass](#). Conceptually, it's pretty simple—players top up 100 Diamonds and, in exchange, unlock seven days of login rewards and exclusive daily missions, while also getting to spin a wheel after matches for more rewards.

From the daily login rewards, players could obtain various weapon skins and an outfit. If a player paid to access the event but didn't log in on one of the reward days, they could still get that daily item but would have to pay additional diamonds. The daily missions included challenges such as knocking down and eliminating enemies. Once completed, players obtain tokens that could be exchanged for different items, such as double EXP cards and a unique motorbike to use in-game.

Regarding the reward wheel, players got a chance to spin after finishing a match. Various in-game rewards were up for grabs, including an Urban Skyboard as the grand prize. Players were limited to five spins a day but automatically unlocked the grand prize after 20 tries if they weren't otherwise successful.



Free Fire's Luminous Pass event

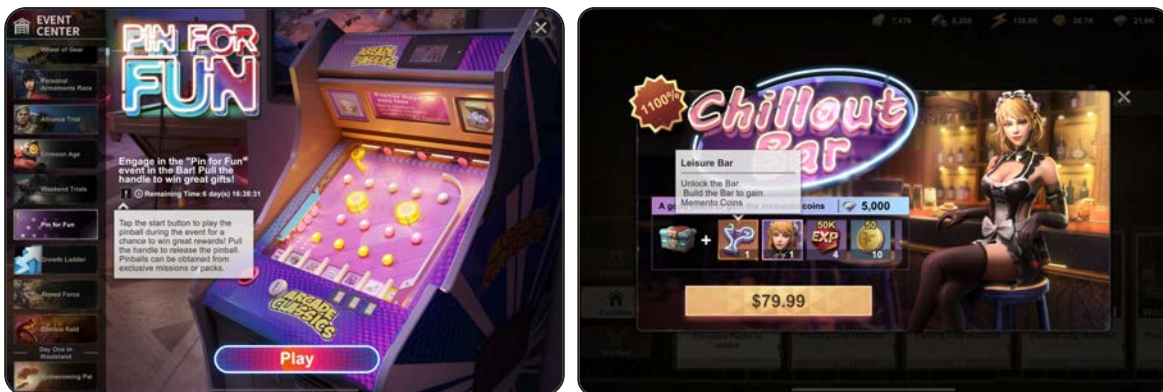
During November, pay-gated event content has emerged as a growing trend, featuring in several other titles alongside Free Fire.

One of the most notable examples is [State of Survival's Resident Evil collaboration event](#), which added Chris Redfield (one of Resident Evil's most iconic characters) to the game as a playable hero with sixty new RPG story missions. To play as Redfield and experience all the new story content, players must first obtain the character from an event gacha. The first event pull each day is free, but subsequent attempts require purchasing survival coin bundles from the in-game store.



State of Survival's Resident Evil collaboration event

Last Fortress: Underground also experimented with pay-gated events with [Pin for Fun](#), which added a limited-time minigame only accessible to players who'd unlocked a permanent in-game building locked behind IAP called the Bar. Those taking part could obtain exclusive cosmetic items.



Accessing Last Fortress' Pin for Fun requires purchasing a permanent building called the Bar.

Meanwhile, [League of Legends: Wild Rift](#) launched a limited-time Arena mode where four teams of two face-off in a battle royale-esque standoff. This mode is unique as, rather than being one large-scale battle, the fight is broken down into several 2v2 rounds in small arenas. Each of the four teams of two only has a limited number of lives (similar to [auto-chess games](#)), which they lose each time they are defeated in a round.

In the mode, players are restricted to using a limited pool of randomized Champions, meaning they might only sometimes have access to their favorite (or most powerful) characters. However, by purchasing the Arena Privilege Pass event booster, players can increase the number of Champions they have to choose from and gain various other benefits, such as increased event currency to earn even more rewards.

You can read the full deconstruction of the event on the [GameRefinery Live Event tracker](#).



Arena limited-time mode gameplay.

Additional midcore gaming highlights

One new game that has been scaling well over the past month is [Black Clover M](#), a turn-based RPG based on the popular action anime and manga of the same name. Fans of Black Clover appear pleased with how the developer has handled the IP, with the game entering the top 50 grossing during the first week of launch.

Some of the most interesting things about the game include that equipped items and gear have an inventory management mechanic, certain characters can team up to use a linked super attack, and players can explore limited areas. The game is developed by Vic Game Studios (a studio created by a lead developer of Seven Deadly Sins Grand Cross, another anime/manga IP game). Garena is the Black Clover M's global publisher and had an event in Free Fire to promote the game at launch.



Black Clover M is a turn-based RPG game that utilizes a well-known action anime/manga IP.

Blizzard's tactical battler [Warcraft Rumble](#) launched worldwide in early November at [Blizzcon](#), with an initial spike pushing it to a grossing rank of 12 and DL 1 in the US. Launch downloads have since dropped, but the title is still holding steady in the top 50 grossing. The game plays similarly to Clash Royale but is more PvE-focused. It also has more unique, larger maps that make it feel like a casual World of Warcraft-themed RTS.

The game features a season-based PvP mode and a bunch of interesting feature implementations, including a choice of gacha tomes and one of the most unique refreshing ware stores (The G.R.I.D.) we've ever seen. You can view Warcraft Rumble's complete deconstruction and feature breakdown on the [GameRefinery SaaS page](#).



Warcraft Rumble gameplay

A prequel to a popular roguelite title in China, [Soul Knight Prequel \(元气骑士前传, CN\)](#), hit the top of the download charts and peaked at a top-grossing 27 last month.

The game has a pixel-art style and is all about slashing monsters to upgrade power, gear, characters, and more. Currently, the game is only available in the Chinese market, and something has yet to be announced regarding a Western release. If it does make its way overseas, we'll be keeping a close eye on its performance, as there are only a few select examples of stand-alone titles in the roguelite subgenre that have performed well.



Soul Knight Prequel (元气骑士前传) is a prequel to a popular roguelite title in China.

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