

Intellectual Property in the Mobile Games Market 2021

An Analysis of IPs in U.S. Mobile Gaming



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Introduction

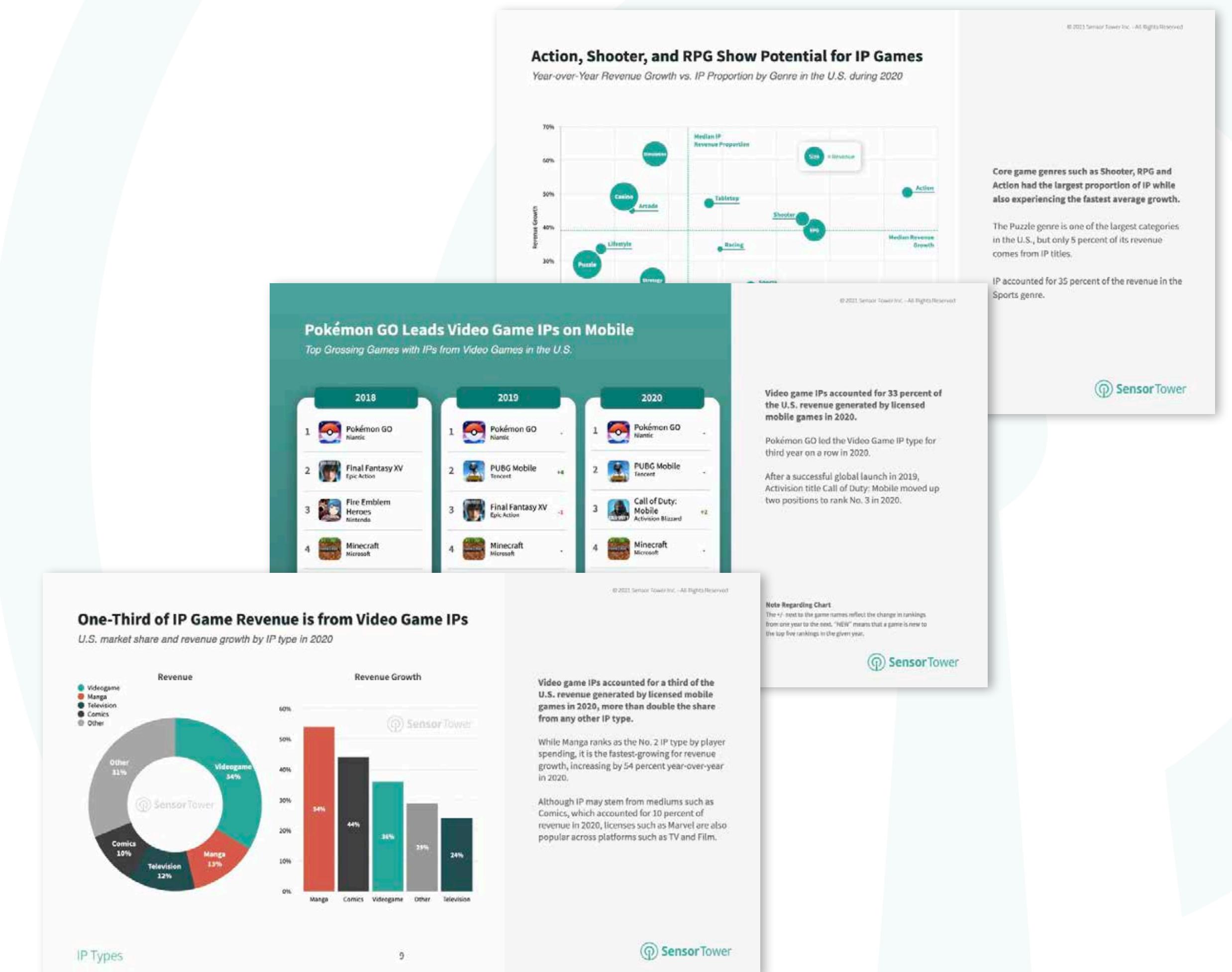
This report analyzes the relevance of Intellectual Property in the U.S. mobile games market, delving into the performance of non-IP games vs. licensed titles, the most successful IP-based games, and IP performance across genres.

Using Sensor Tower's Game Taxonomy IP classifications, this report contains information on licenses, IP types, operators, and corporate parents.

Inclusion Criteria

Sensor Tower's definition of Intellectual Property covers multi-platform IPs that are licensed to mobile game studios, originating from films, books, television, toys, celebrities, sports, board games, video games, comics, and manga and have dedicated mobile games.

Video game IPs that only have direct mobile ports or are internal to the brand owners themselves have been excluded.



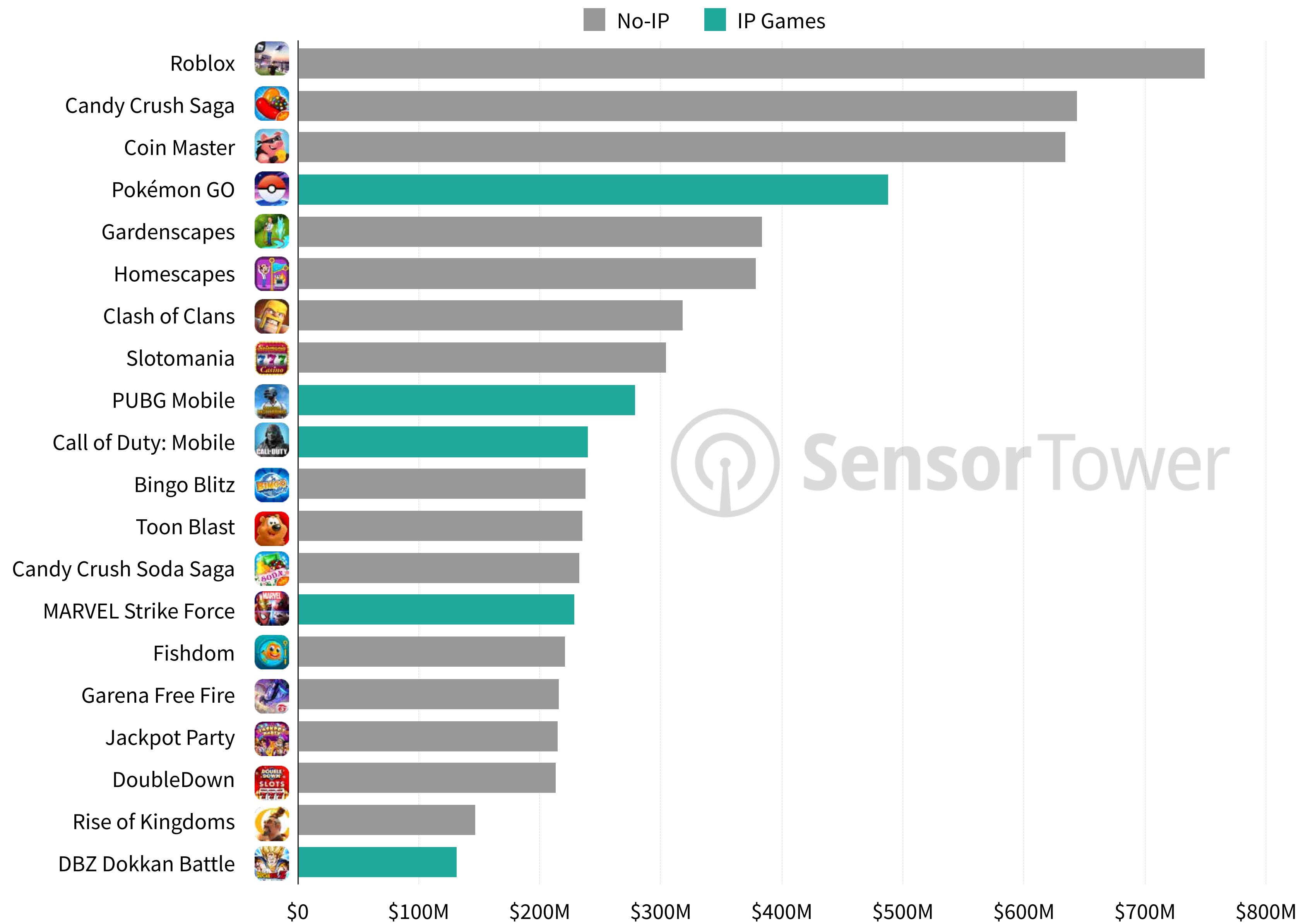


An Overview of IP-Based Mobile Games in the U.S.

IP Games: United States

Three IP Games Rank Among the Top 10 by Revenue

Top 20 grossing mobile games in 2020 on the U.S. App Store and Google Play



During 2020, **three out of the top 10 revenue generating mobile games in the United States used a license**: Pokémon GO, PUBG Mobile, and Call of Duty: Mobile.

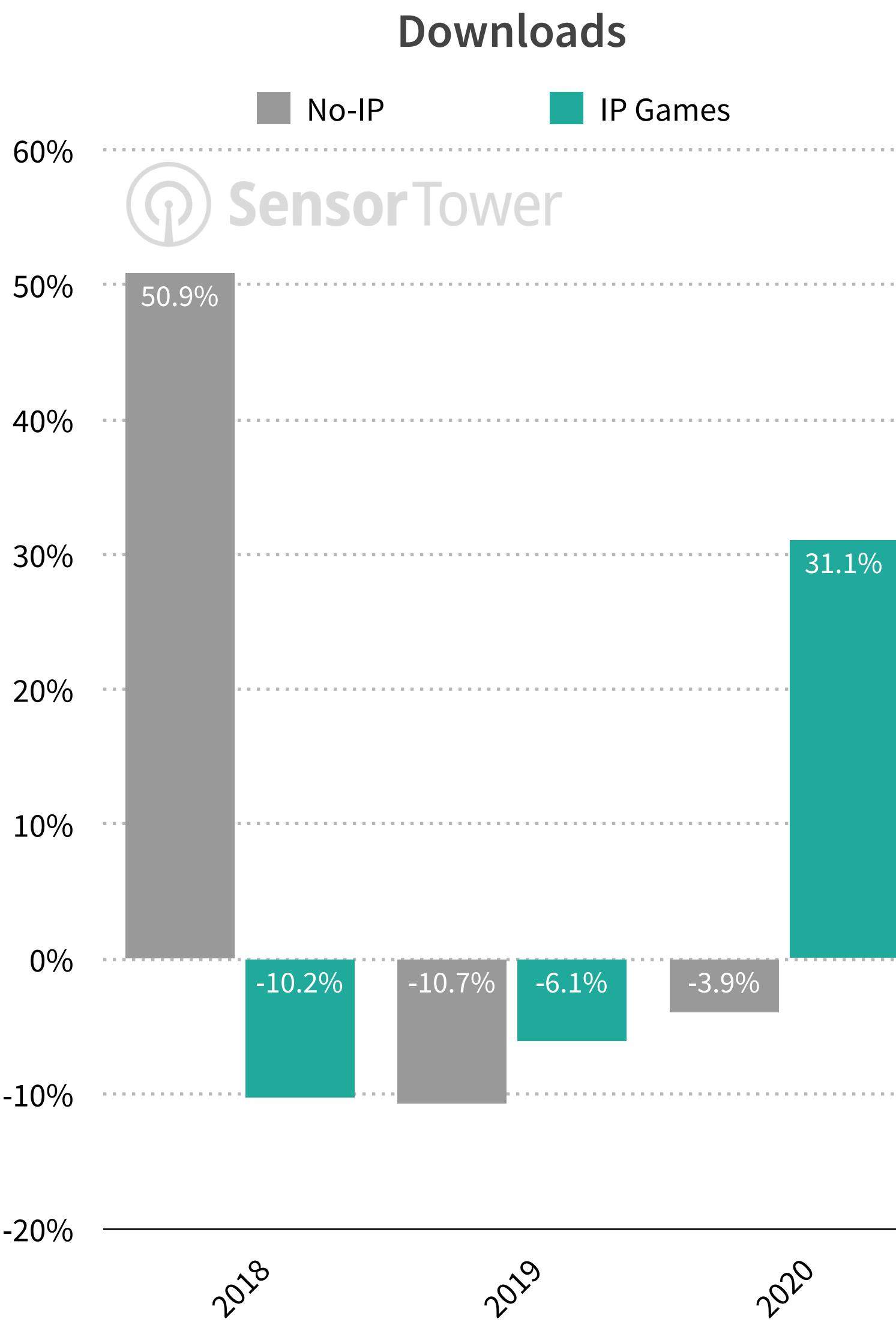
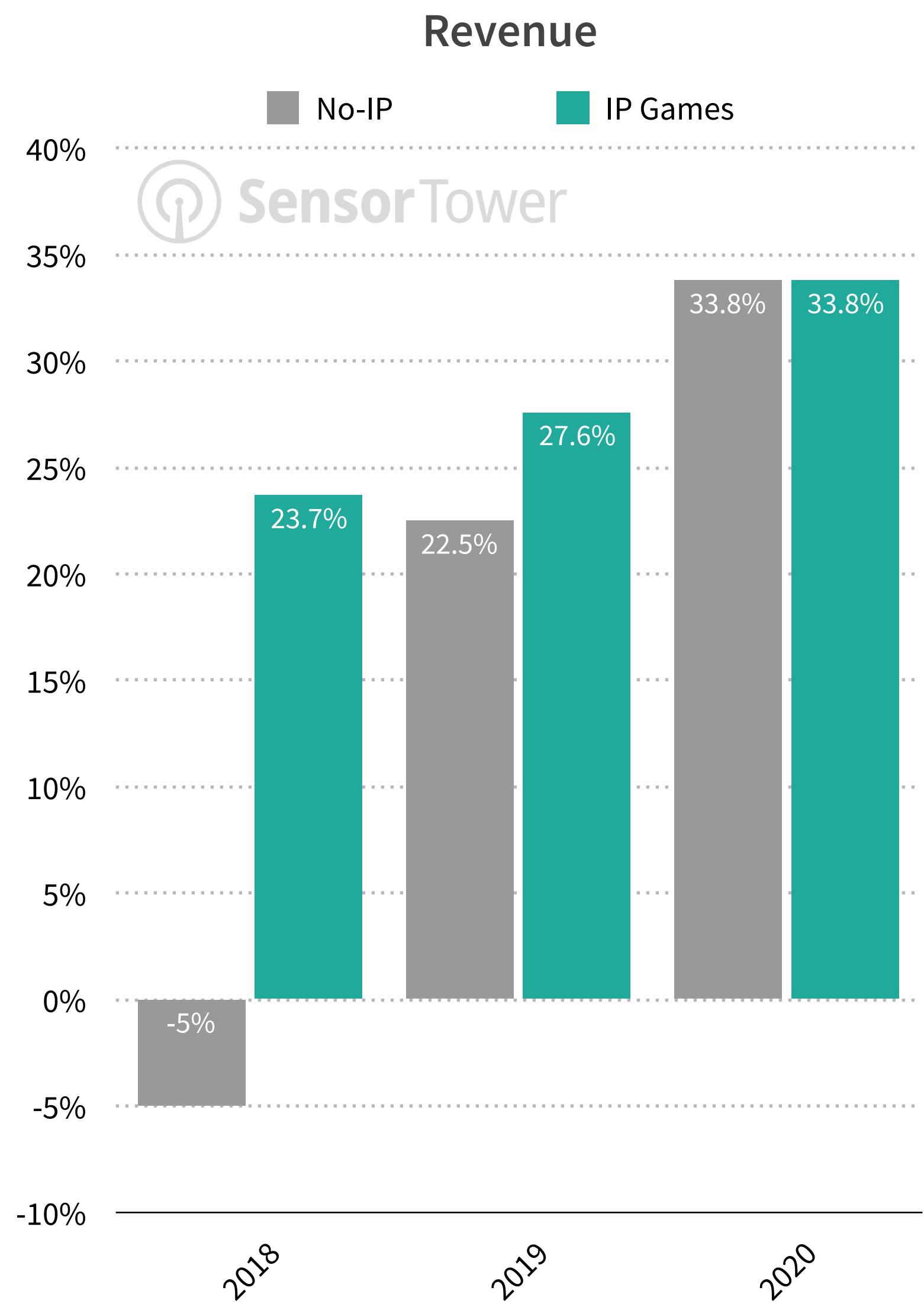
An additional two licensed titles appeared in the top 20, Marvel Strike Force and Dragon Ball Z: Dokkan Battle.

Pokémon GO remained the most successful licensed mobile game, generating approximately \$480 million in U.S. player spending in 2020.

Two out of the top three mobile games utilizing an IP belonged to the Shooter genre.

IP vs. Non-IP Games: Revenue & Download Growth

Top 10 grossing IP and non-IP games by annual U.S. player spending and download growth



IP Games

The top 10 revenue generating games saw similar year-over-year growth of 33.8 percent for both IP and non-IP titles in 2020.

Installs for the top 10 grossing IP games increased by 31.1 percent year-over-year in 2020, compared to the 3.9 percent decline in downloads for the top 10 non-IP titles. IP growth was led by Call of Duty: Mobile.

While 2019 saw the launch of two major IP-based mobile games with Call of Duty: Mobile and Mario Kart Tour, which **both broke 100 million downloads within their first month**, launching in Q3/Q4 meant that they did not rank in the top 10 by revenue that year.

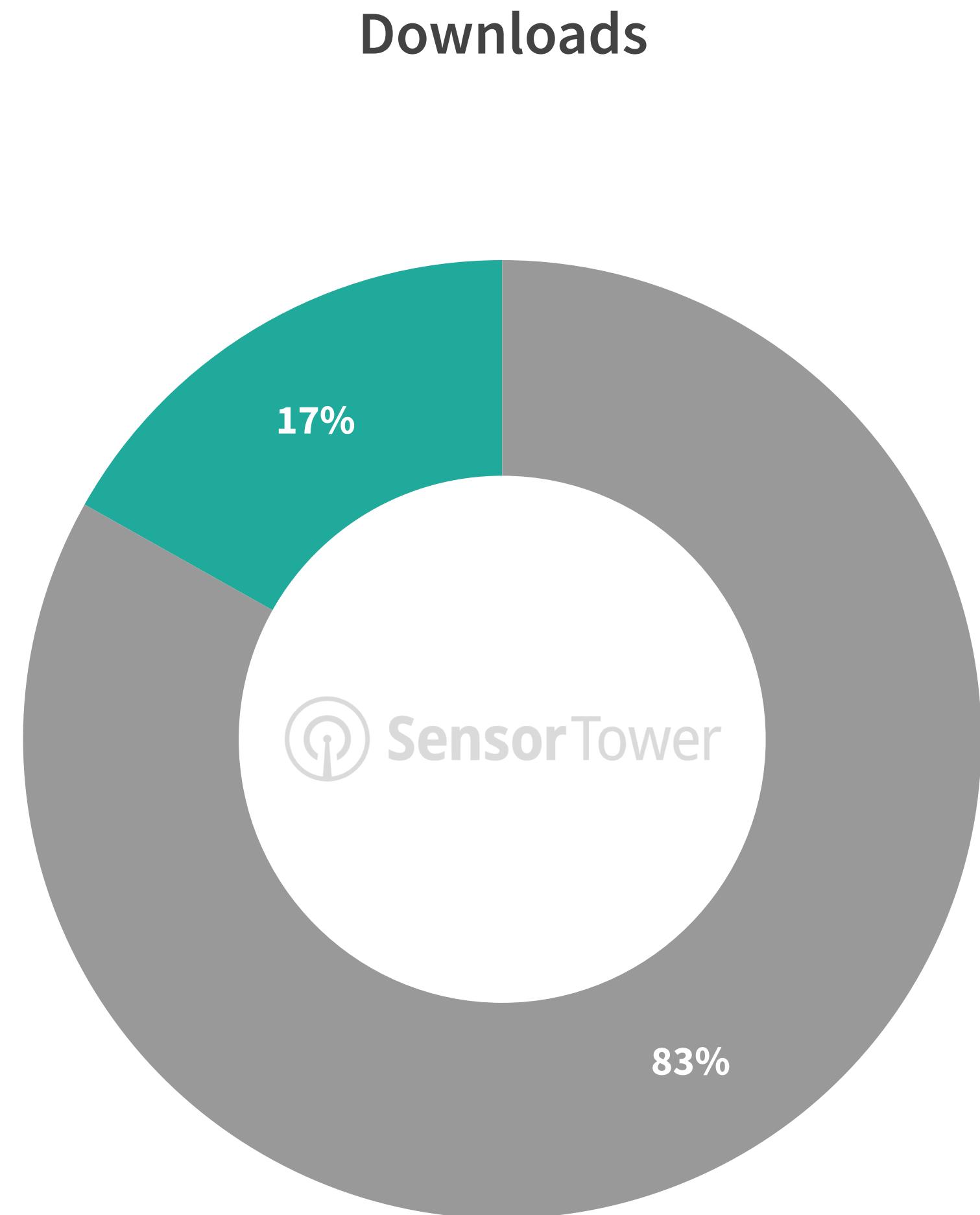
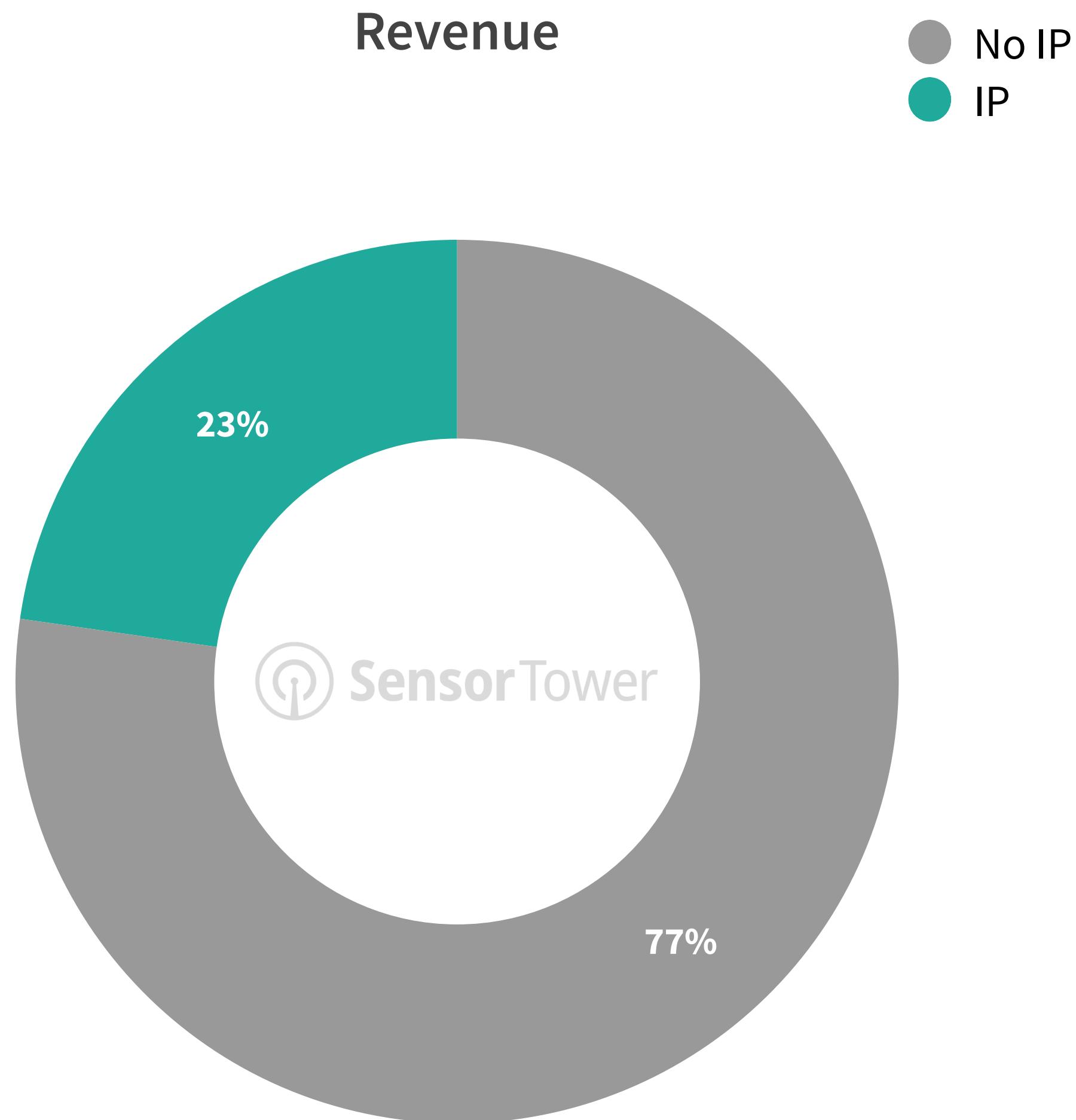
IP-based games continued to be launched in 2021, with **Crash Bandicoot: On the Run generating 23.6 million downloads in its first week**. Other licensed titles on the horizon include Diablo Immortal and Apex Legends.

Note Regarding Downloads Growth Chart

On both charts the selection criteria is the top 10 games with and without an IP based on revenue. This approach was taken to avoid the population of Hypercasual titles.

IP Vs. Non-IP Games: Revenue & Download Share

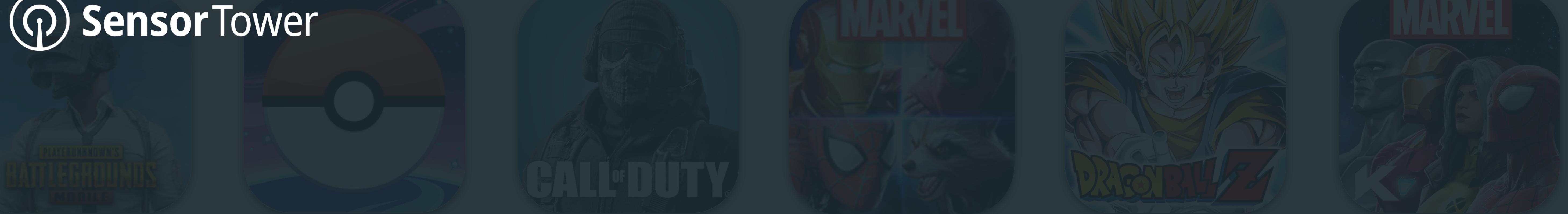
Overall market share of IP games in the U.S. in 2020



In 2020, 23 percent of overall U.S. mobile game player spending was generated by IP-based titles. The market share of IP-based games for downloads was smaller, making up 17 percent of all installs.

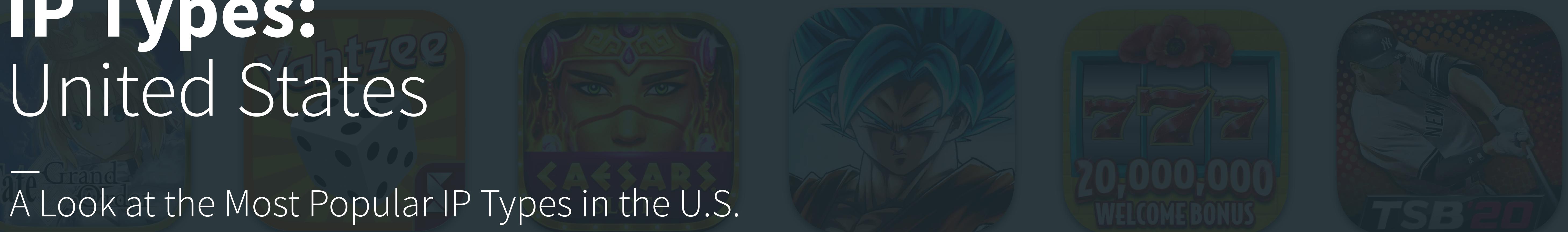
The overall market share of IP has remained stable for both revenue and downloads over the last two years.

The share of downloads and revenue for mobile games is outsized from the number of IP-based mobile games on the market. **While only 9 percent of games used an IP, these games accounted for nearly a quarter of revenue.**



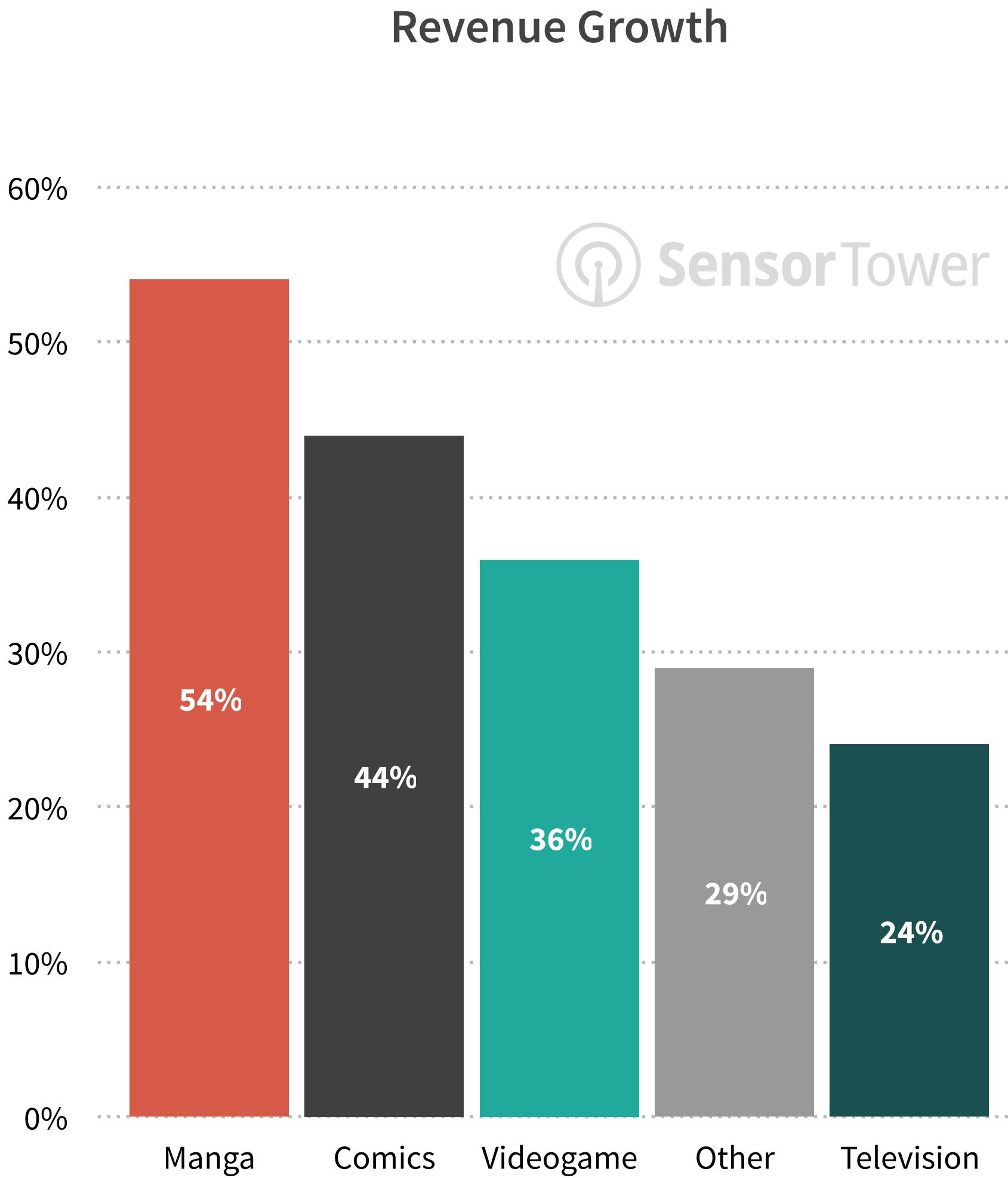
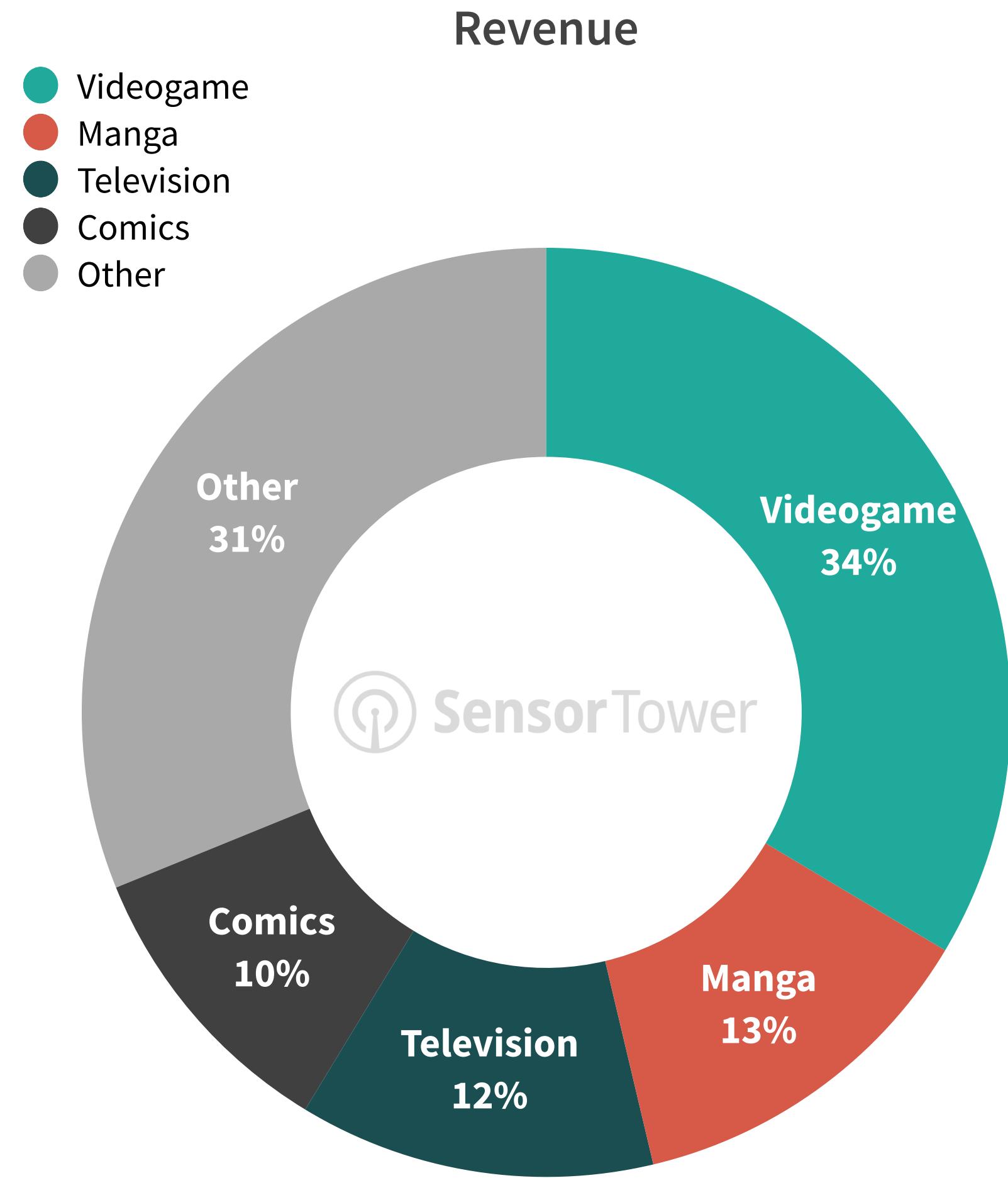
IP Types: United States

A Look at the Most Popular IP Types in the U.S.



One-Third of IP Game Revenue is from Video Game IPs

U.S. market share and revenue growth by IP type in 2020



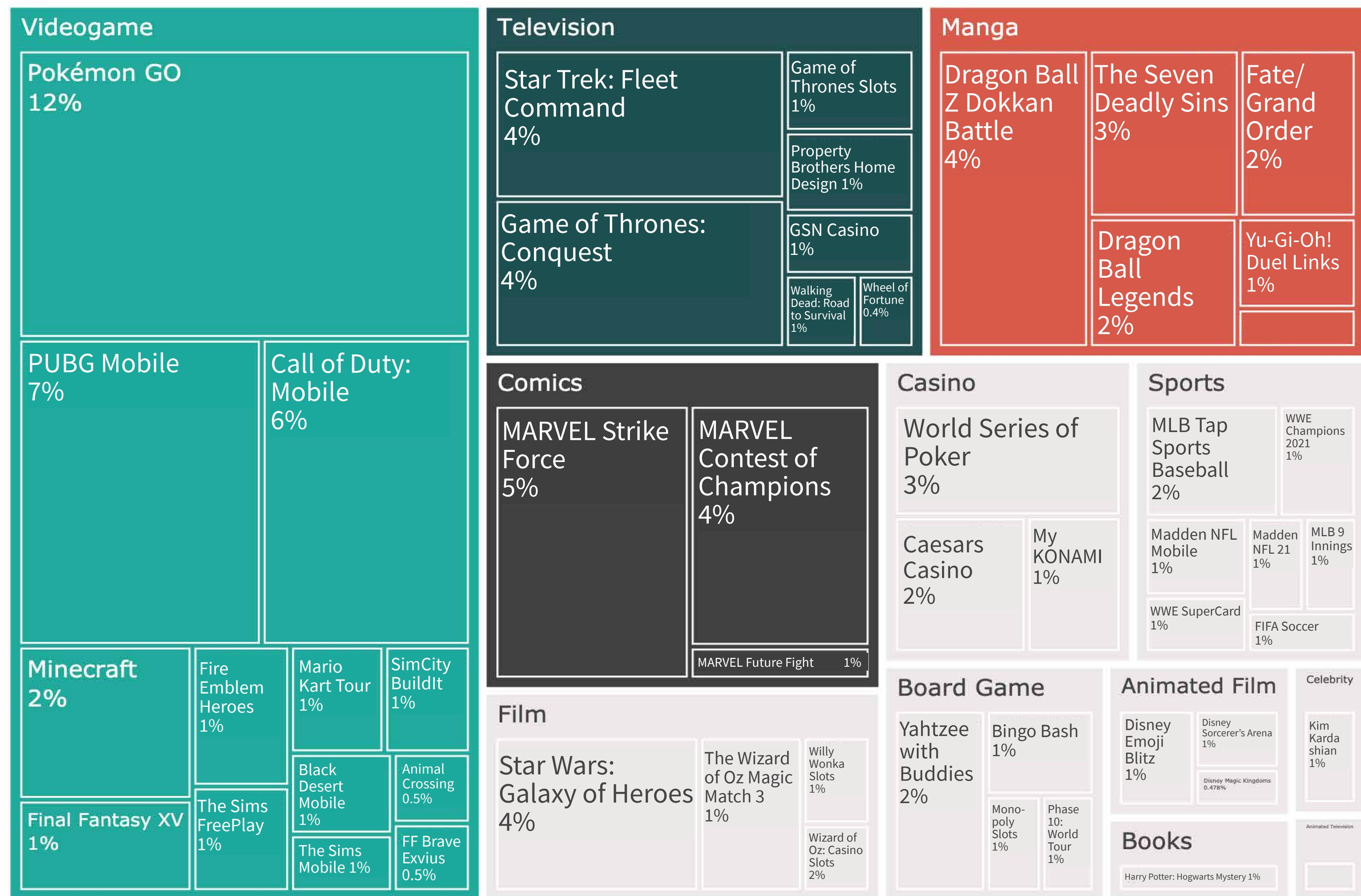
Video game IPs accounted for a third of the U.S. revenue generated by licensed mobile games in 2020, more than double the share from any other IP type.

While Manga ranks as the No. 2 IP type by player spending, it is the fastest-growing for revenue growth, increasing by 54 percent year-over-year in 2020.

Although IP may stem from mediums such as Comics, which accounted for 10 percent of revenue in 2020, licenses such as Marvel are also popular across platforms such as TV and Film.

Share of U.S. Revenue by IP Type and Game

U.S. market share by IP type and game in 2020



Video Game IPs from non-mobile platforms, such as Pokémon GO, PUBG Mobile, and Call of Duty: Mobile, have successfully translated their core experiences to mobile, in turn generating significant revenue.

Manga is dominated by Japanese IPs like Dragon Ball Z, Yu-Gi-Oh!, and The Seven Deadly Sins, which are popular with U.S. audiences.

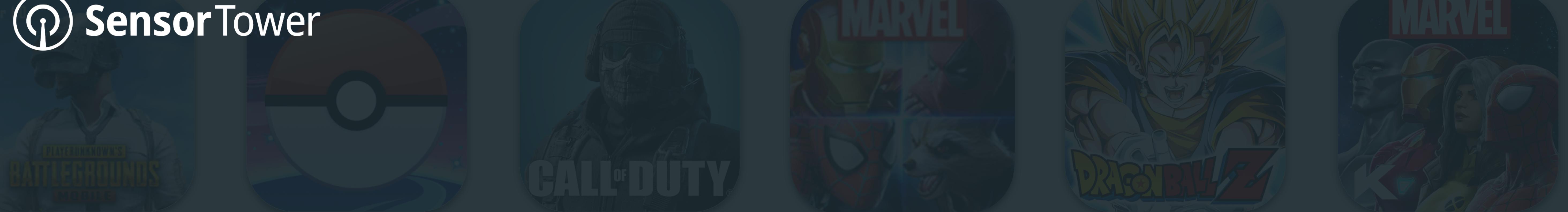
The Marvel IP accounts for the vast majority of player spending in Comics-based mobile games

Television licenses accounted for 12 percent of player spending, double that of Film.

IPs that perceived as the largest do not always generate the greatest revenue.

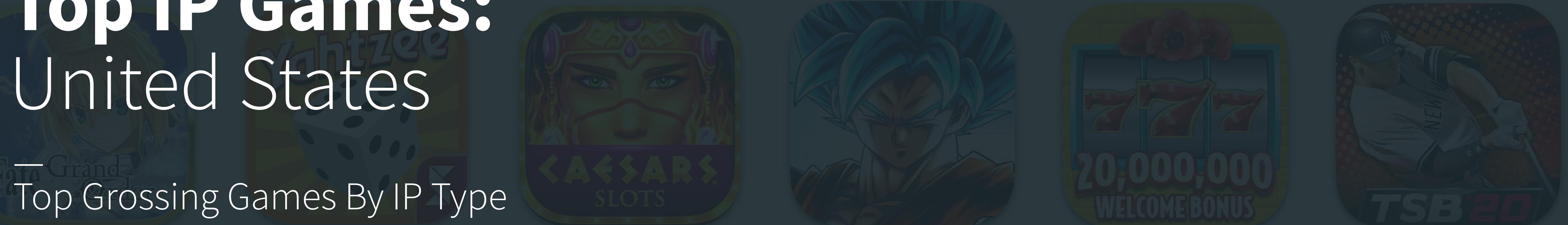
Note Regarding Chart

Please refer to the [interactive chart in our blog post](#) for more detail. Games with less than \$12 million in U.S. net revenue in 2020 were excluded.



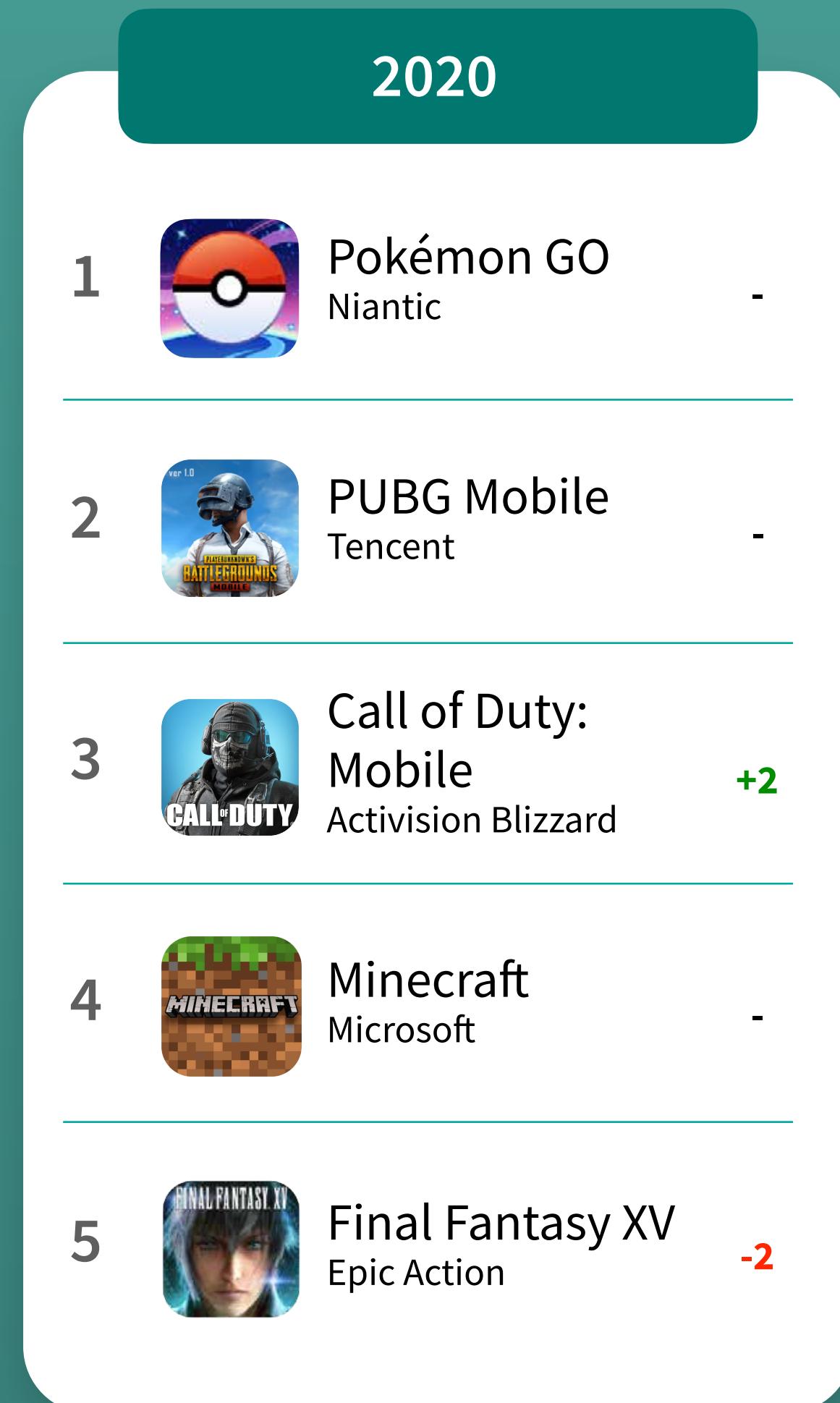
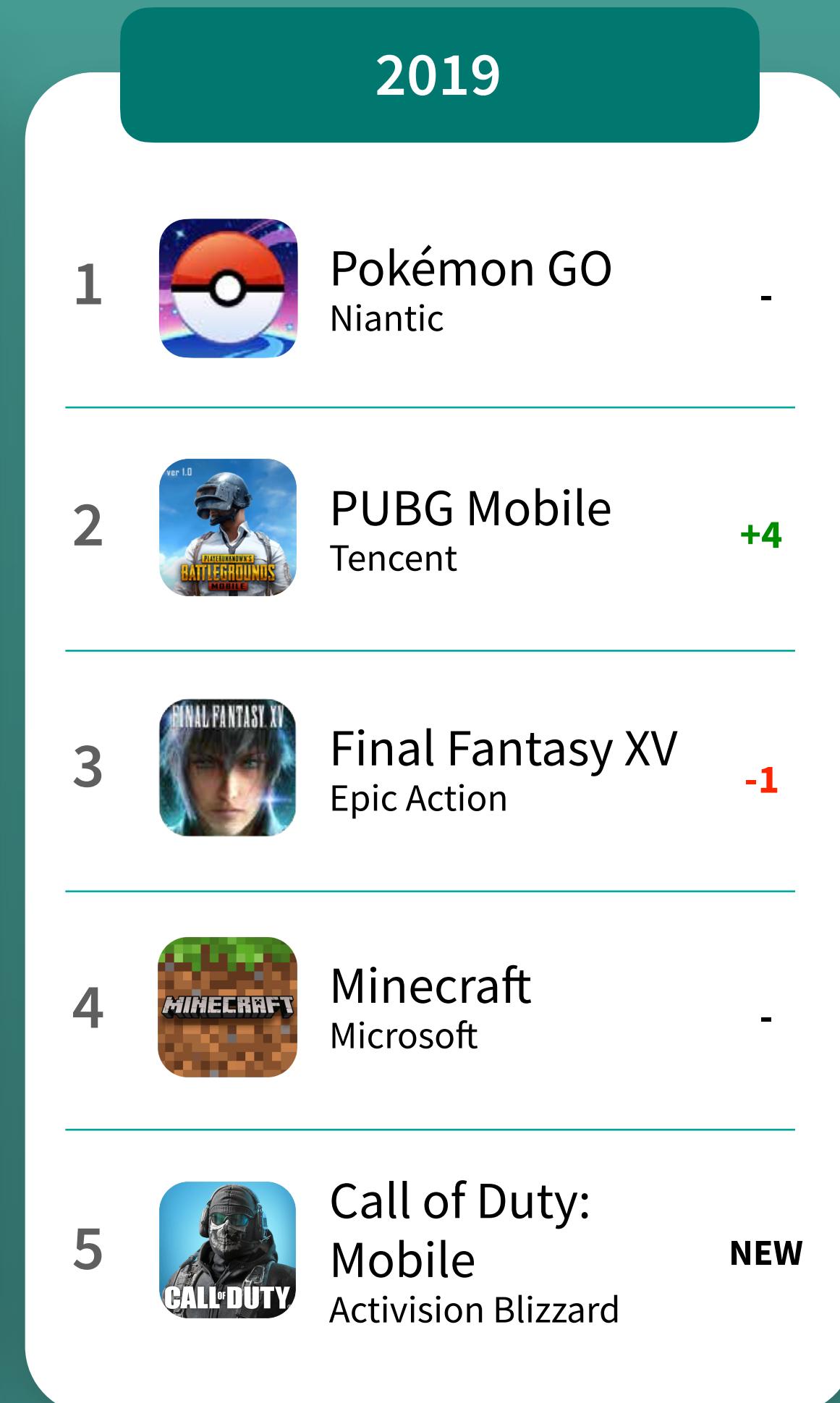
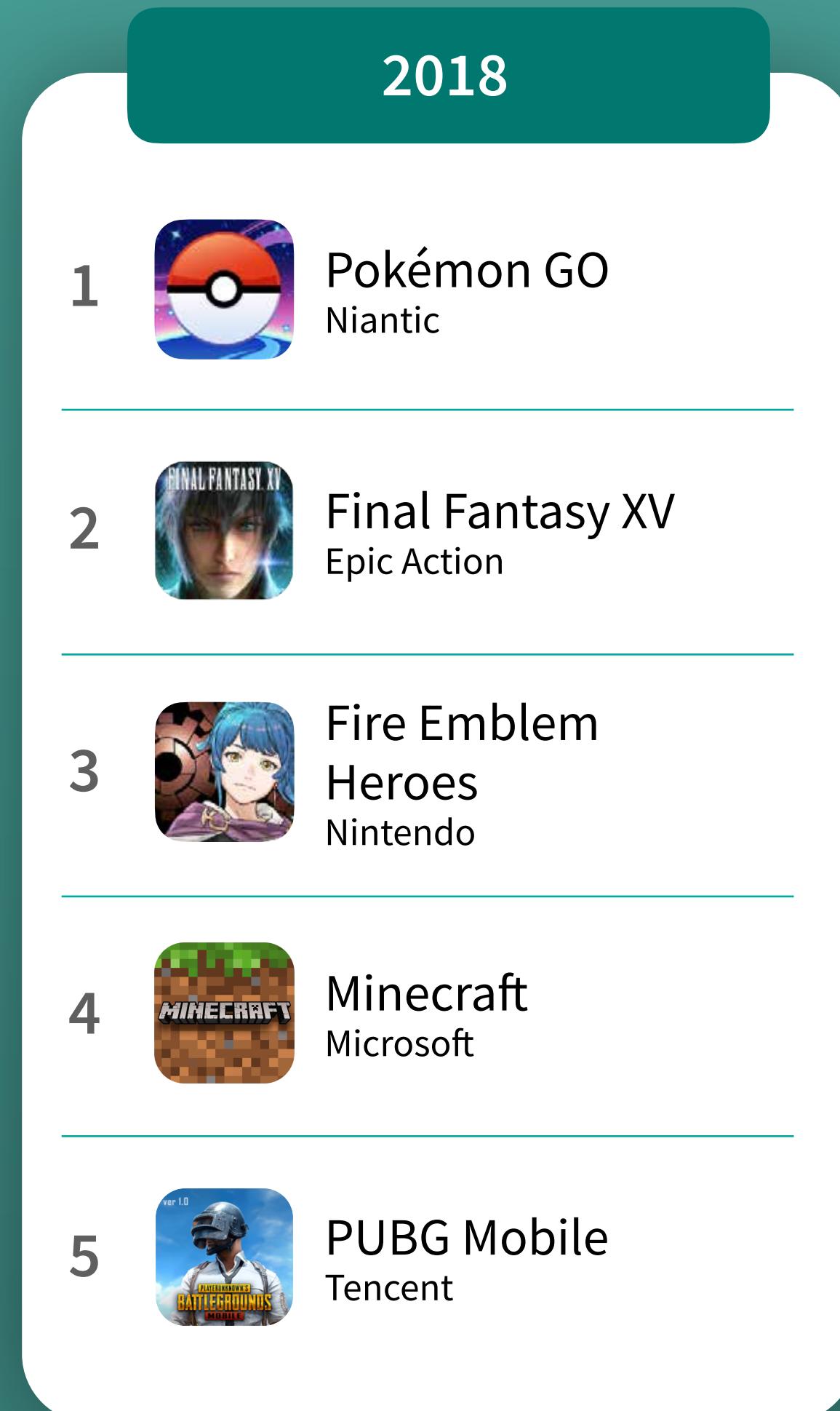
Top IP Games: United States

Top Grossing Games By IP Type



Pokémon GO Leads Video Game IPs on Mobile

Top Grossing Games with IPs from Video Games in the U.S.



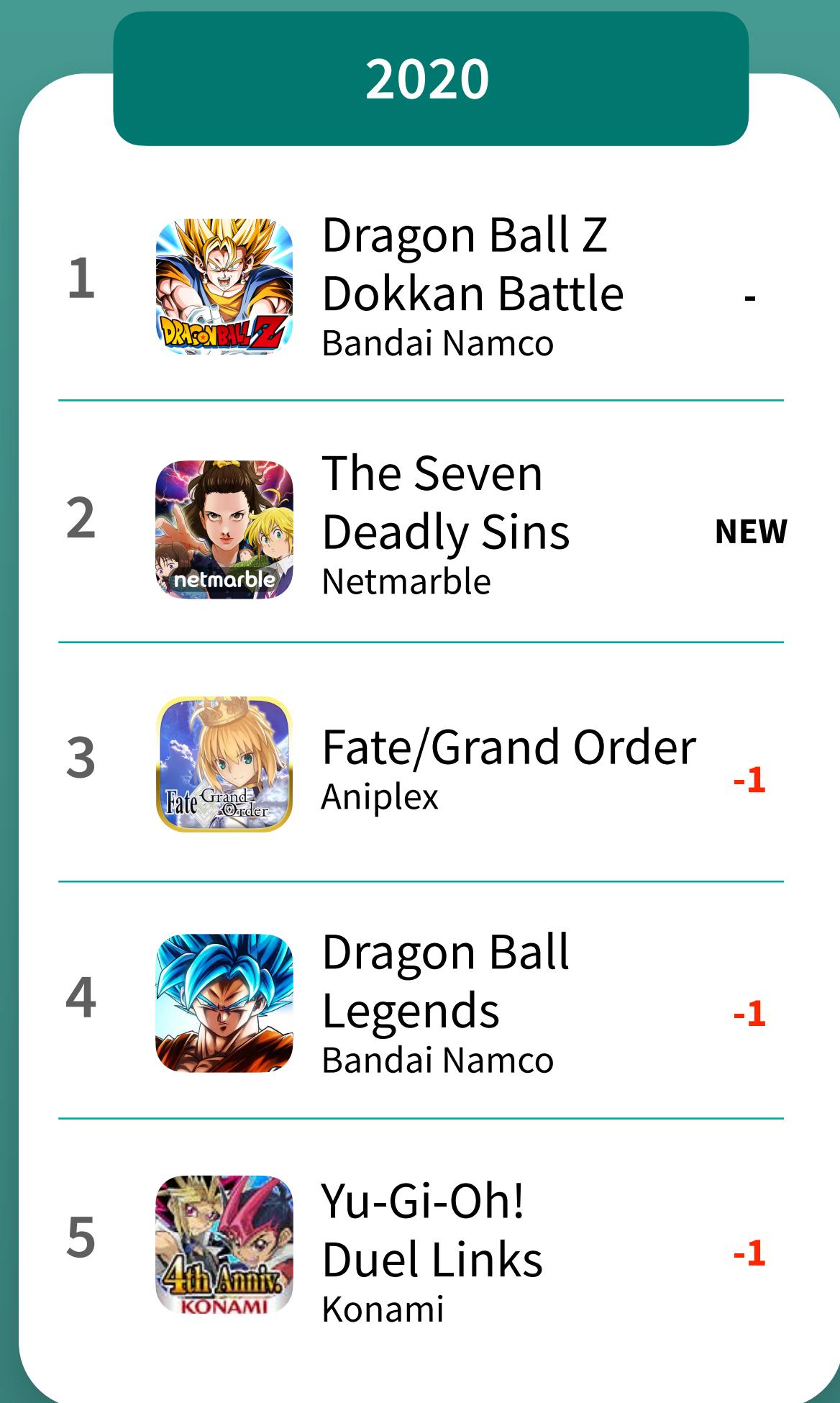
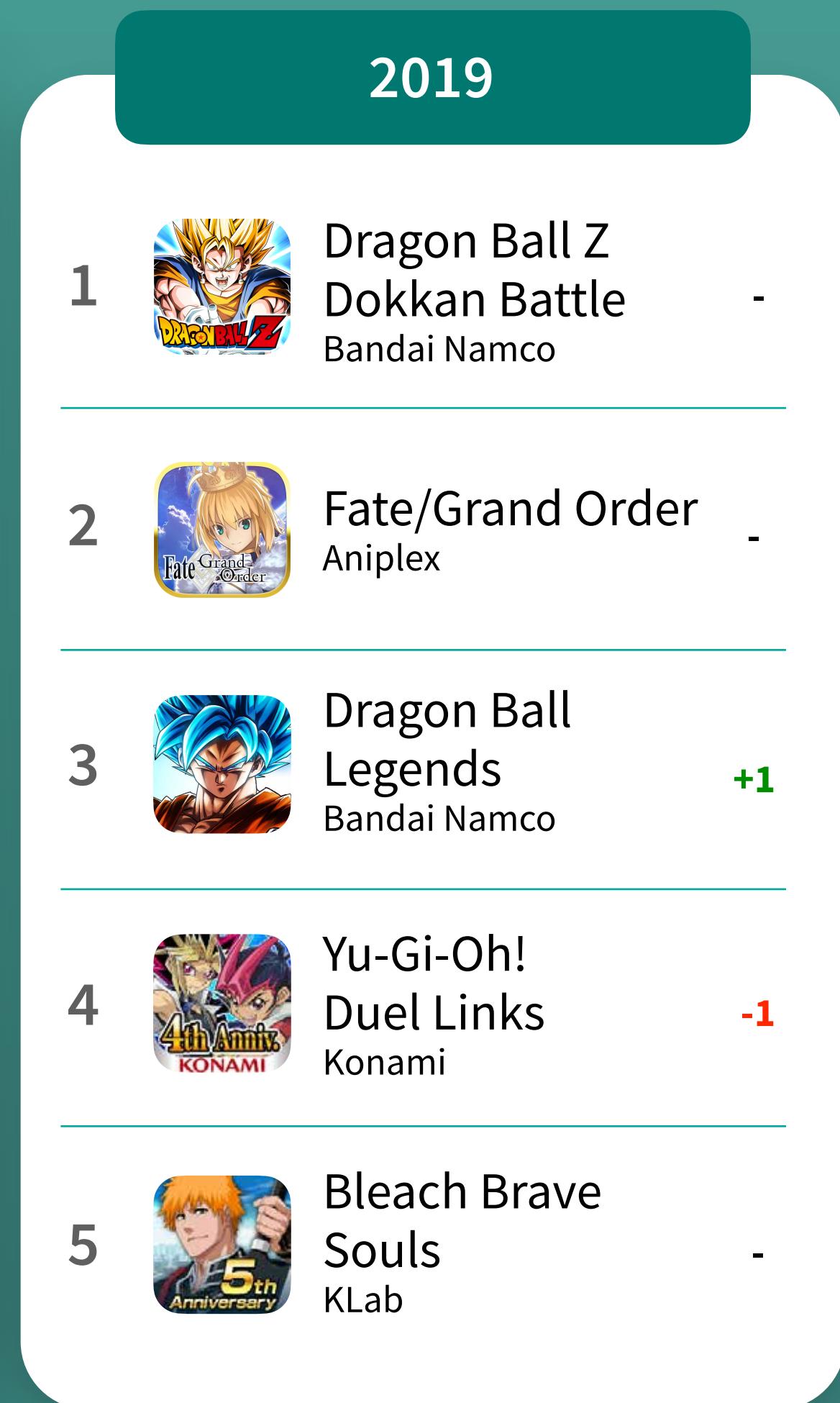
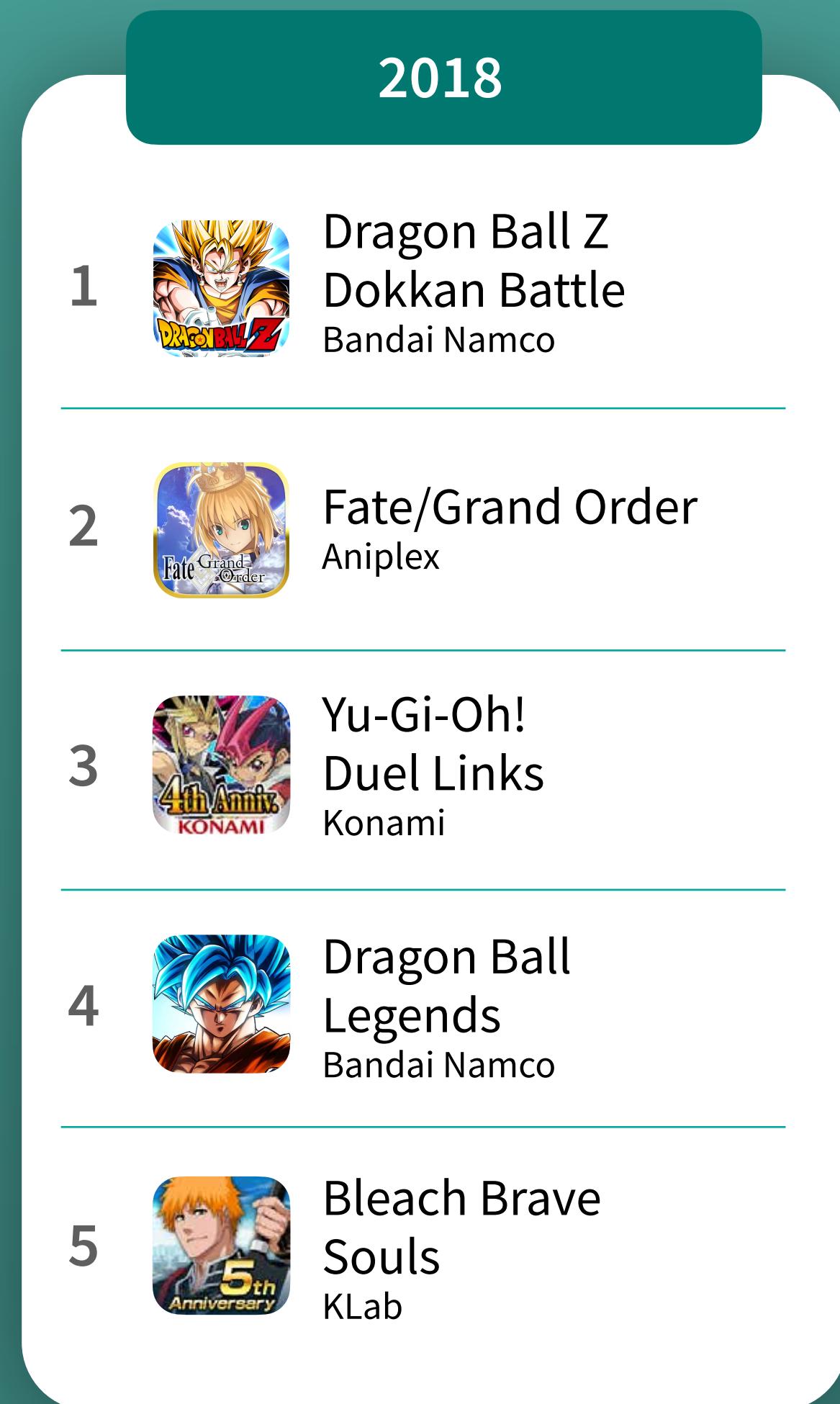
Video game IPs accounted for 34 percent of the U.S. revenue generated by licensed mobile games in 2020.

Pokémon GO led the Video Game IP type for third year on a row in 2020.

After a successful global launch in 2019, Activision title Call of Duty: Mobile moved up two positions to rank No. 3 in 2020.

Dragon Ball Z is Consistently the Top Manga Game IP

Top Grossing Games with IPs from Manga in the U.S.



Manga IPs accounted for 13 percent of the U.S. revenue generated by licensed mobile games in 2020.

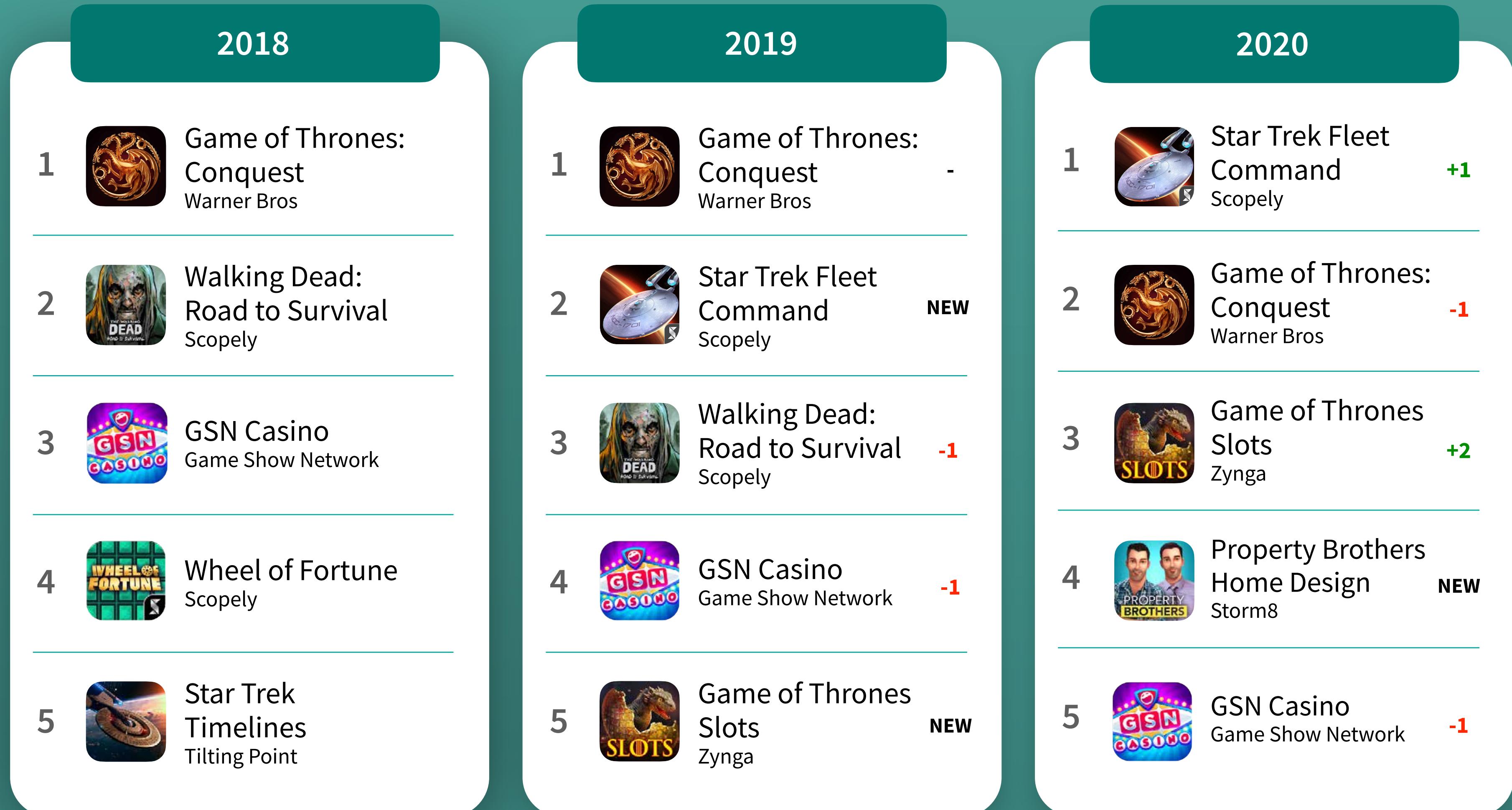
This type is dominated by Japanese IPs that are popular among U.S. audiences, such as The Seven Deadly Sins and Yu-Gi-Oh! Dragon Ball Z stands out with two games among the top five.

Note Regarding Chart

The +/- next to the game names reflect the change in rankings from one year to the next. "NEW" means that a game is new to the top five rankings in the given year.

Star Trek Took the Top Spot After Game of Thrones Finale

Top Grossing Games with IPs from Television in the U.S.



Television IPs accounted for 12 percent of the U.S. revenue generated by licensed mobile games in 2020.

After the Game of Thrones finale in 2019, Star Trek Fleet Command became the biggest licensed game in the U.S. in 2020.

Scopely stands out as a publisher and operates a very diversified portfolio of IPs: Marvel, Wheel of Fortune, Walking Dead, and Star Trek.

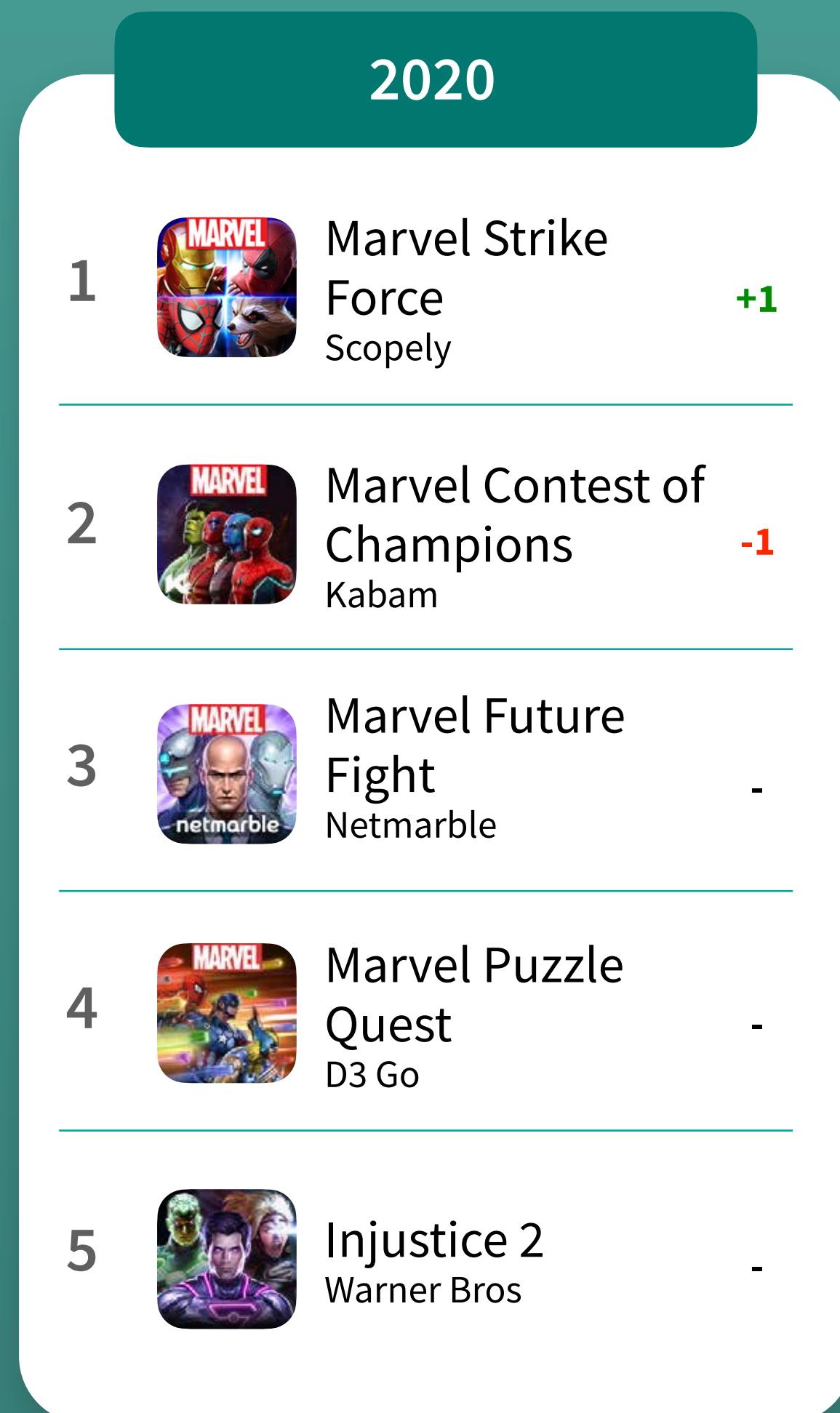
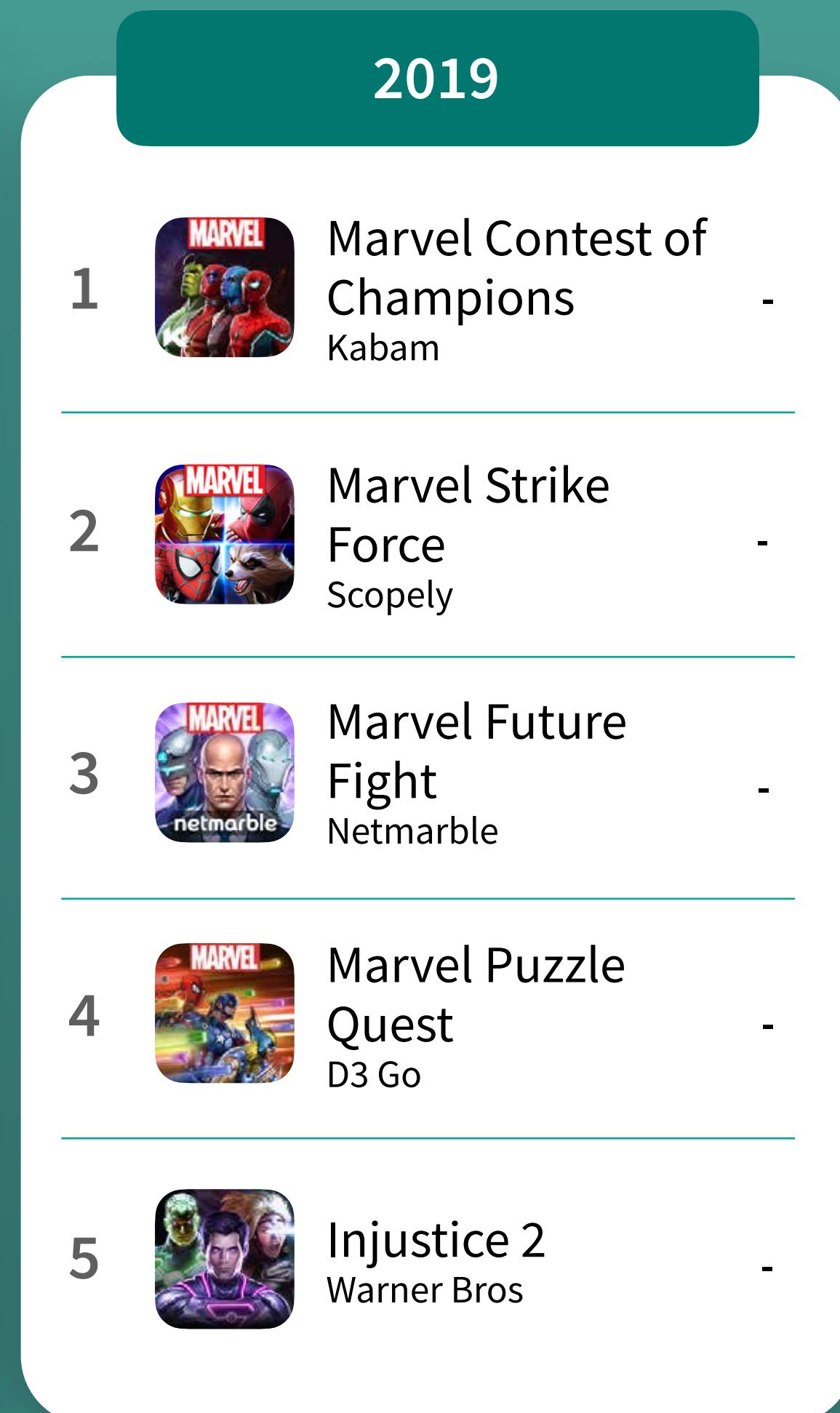
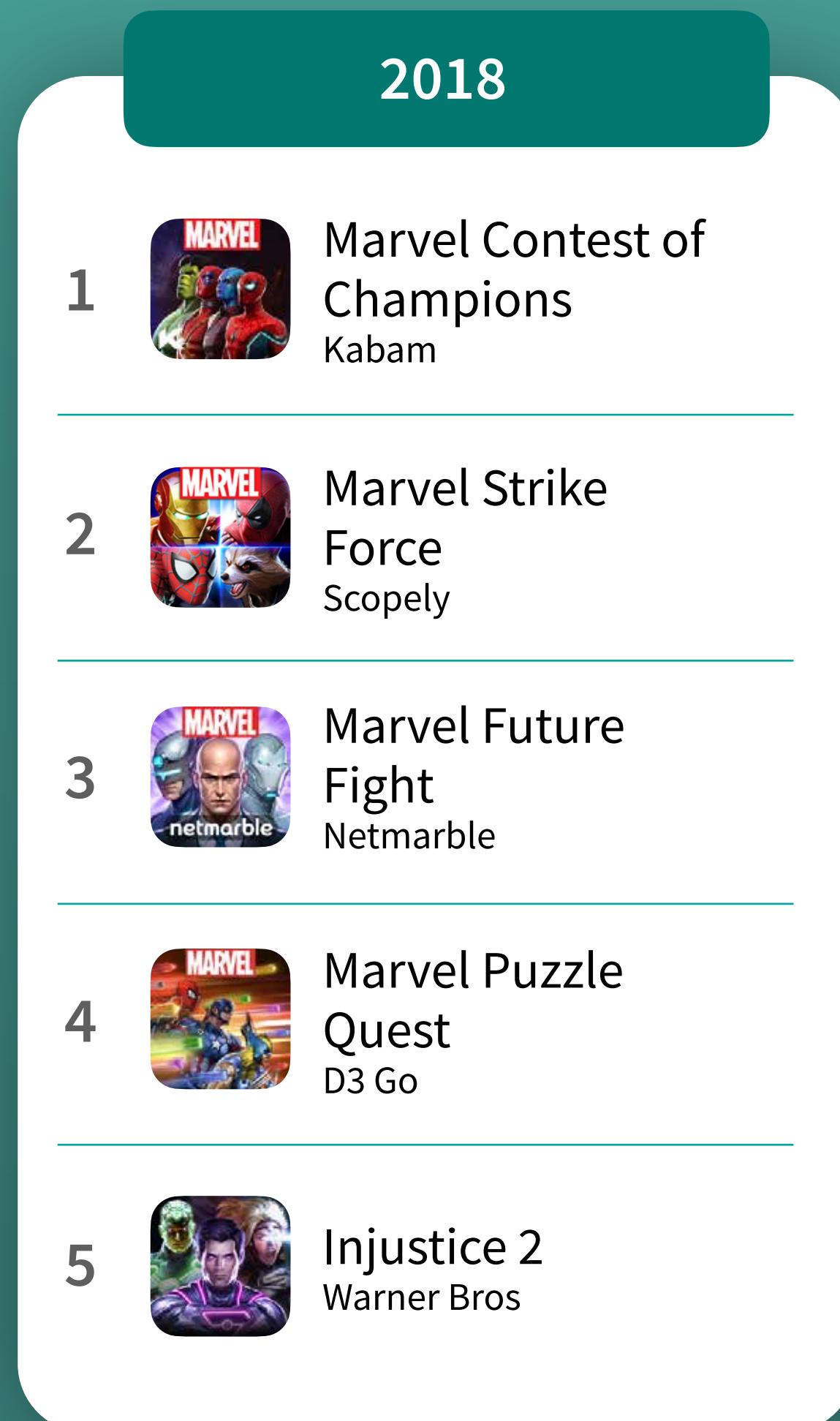
Some companies license their IPs to game publishers with more experience in a specific domain. For example, Warner Media licensed the Game of Thrones IP to Zynga, who has had previous success publishing slots mobile games.

Note Regarding Chart

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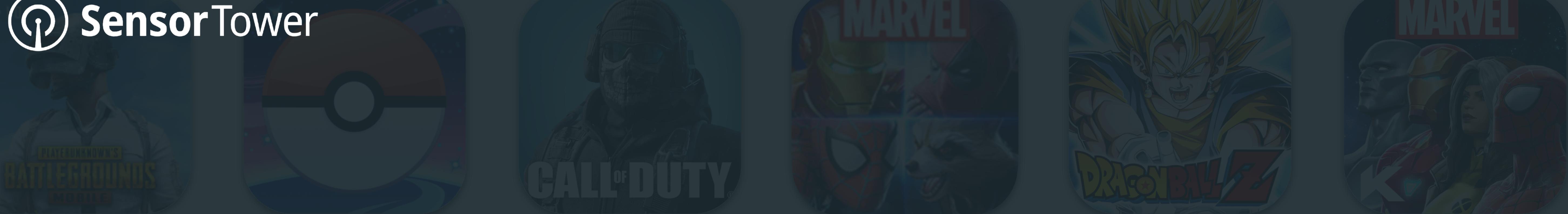
Marvel Dominates the Comics IP Type in the U.S.

Top Grossing Games with IPs from Comics in the U.S.



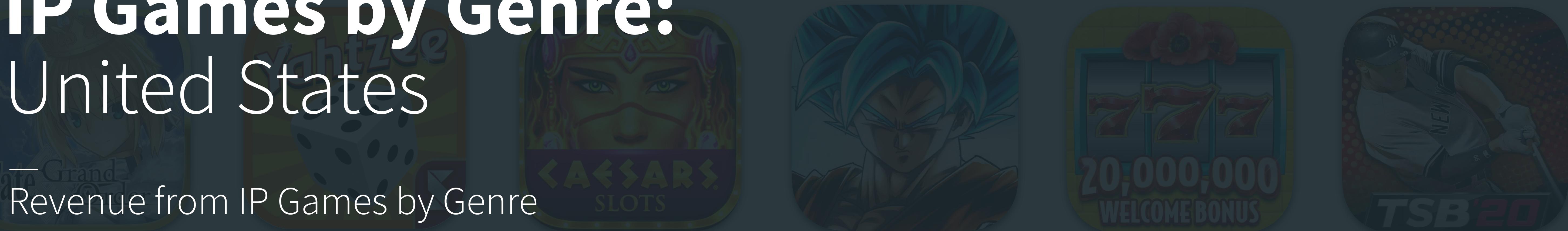
Comic IPs accounted for 10 percent of the U.S. revenue generated by licensed mobile games in 2020.

Four of the top five games rely on the Marvel IP. Nevertheless, it's worth mentioning that Marvel has licensed its IPs to different publishers: Scopely, Kabam, Netmarble, and D3 Go.



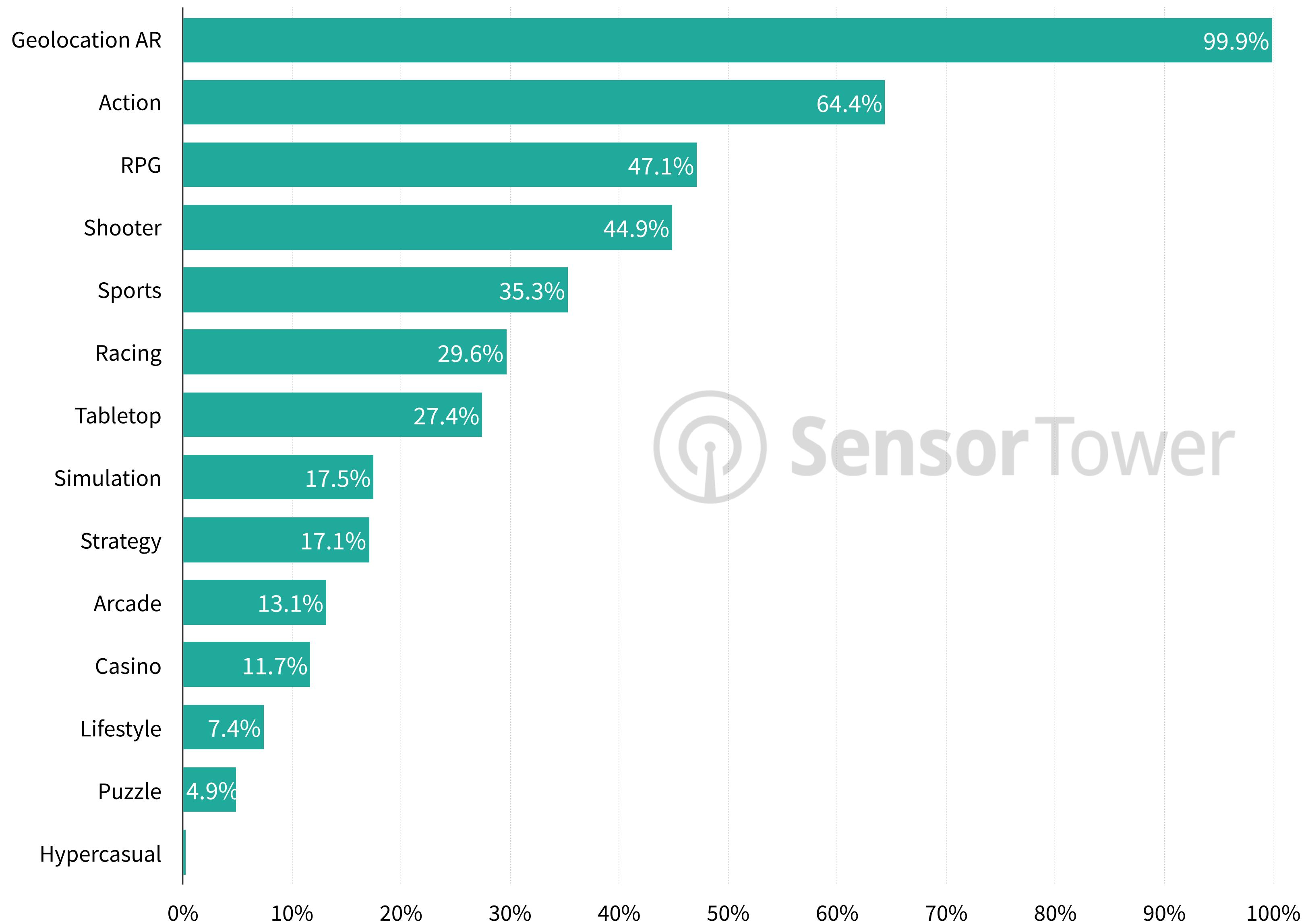
IP Games by Genre: United States

Revenue from IP Games by Genre



IP is More Popular with Mid-Core Audiences

Revenue Share for IP Games by U.S. Revenue Per Genre in 2020



The mobile Geolocation AR genre is comprised almost entirely of licensed IP, including Pokémon GO, Jurassic World Alive, and Harry Potter: Wizards Unite.

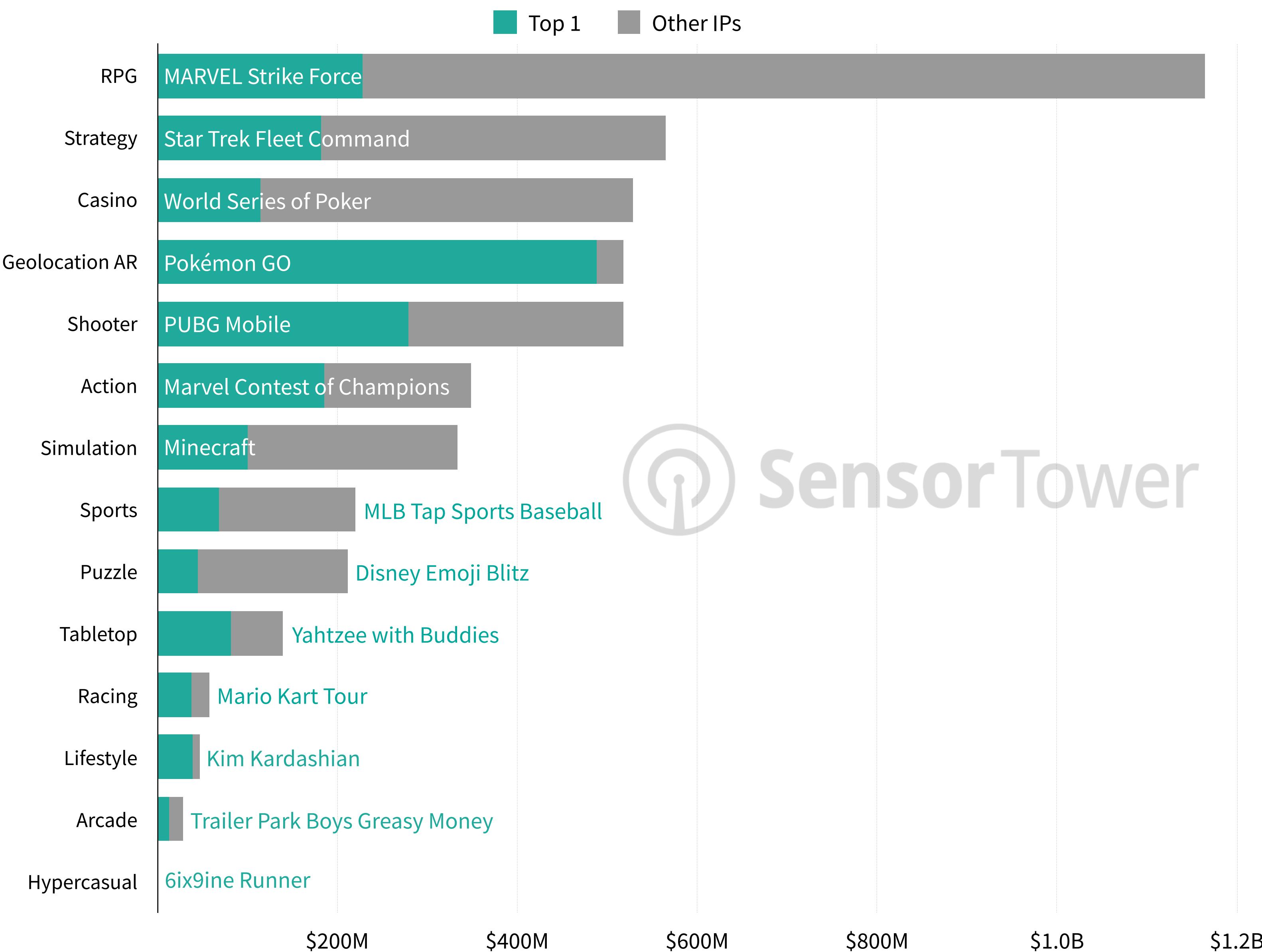
Action is an outlier, with 64.4 percent of player revenue coming from licensed IP, led by Marvel Contest of Champions and Dragon Ball Legends.

Outside of Geolocation AR and Action, there were two genres where more than 40 percent of player spending comes from IPs: RPG and Shooter.

Genres with the highest percentage of revenue from licensed games are typically associated with mid-core audiences.

RPG is the Top Genre for IP Games

Overall IP Revenue and Top IP Game by Genre in the U.S. during 2020



The RPG genre ranks No. 1 for IP-based player spending, generating more than \$1.1 billion in 2020.

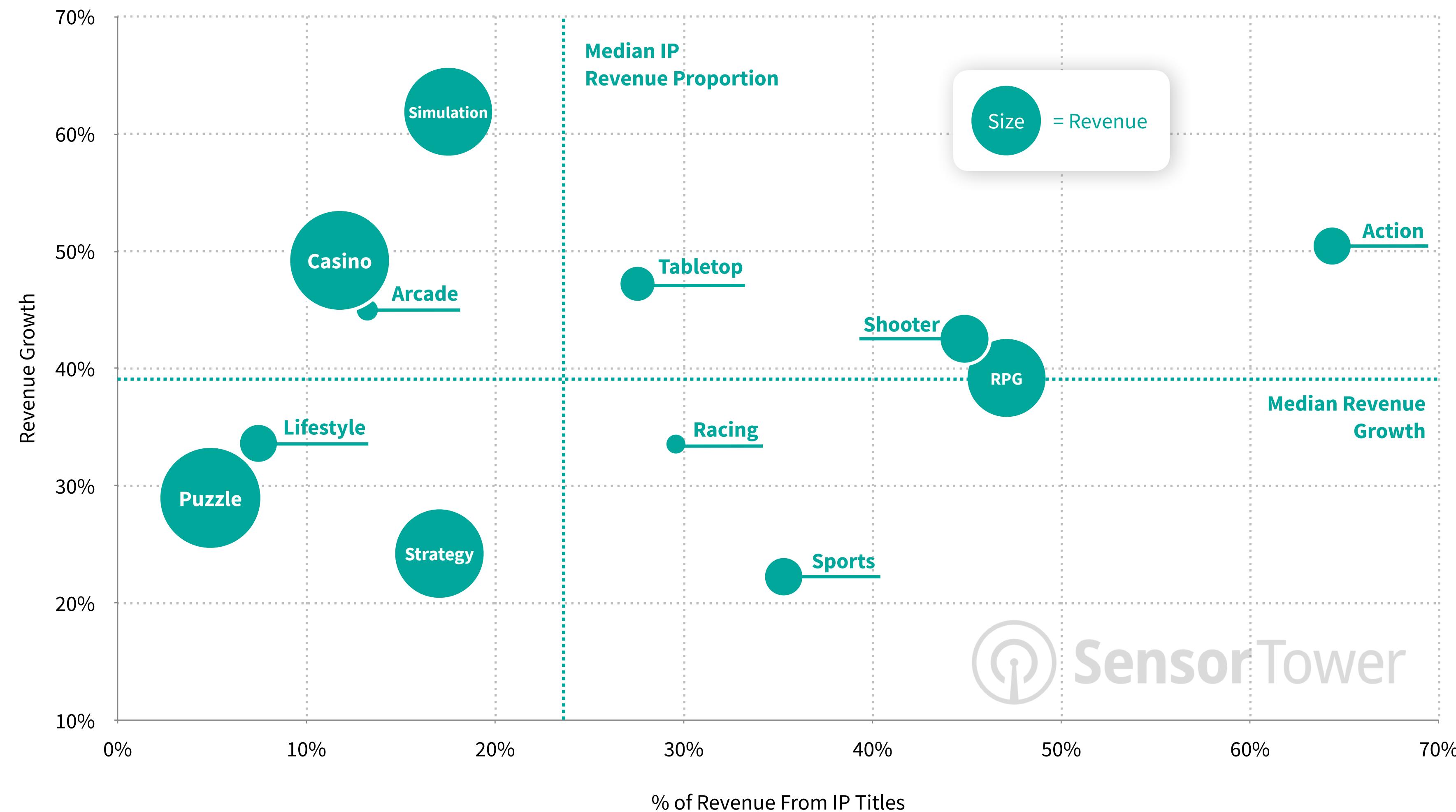
Licensed mobile games in the Shooter genre generated more than \$500 million in 2020. PUBG Mobile accounts for 53 percent of genre revenue from IPs, while Call of Duty: Mobile accounts for 47 percent.

Simulation games that use licenses generated more than \$300 million in revenue during 2020, including a diverse lineup from Minecraft and The Sims to Harry Potter and Animal Crossing.

While some genres, such as Geolocation AR, are dominated by one or two IPs, other categories are much more diversified and offer a potential opportunity for newcomers.

Action, Shooter, and RPG Show Potential for IP Games

Year-over-Year Revenue Growth vs. IP Proportion by Genre in the U.S. during 2020



Core game genres such as Shooter, RPG and Action had the largest proportion of IP while also experiencing the fastest average growth.

The Puzzle genre is one of the largest categories in the U.S., but only 5 percent of its revenue comes from IP titles.

IP accounted for 35 percent of the revenue in the Sports genre.

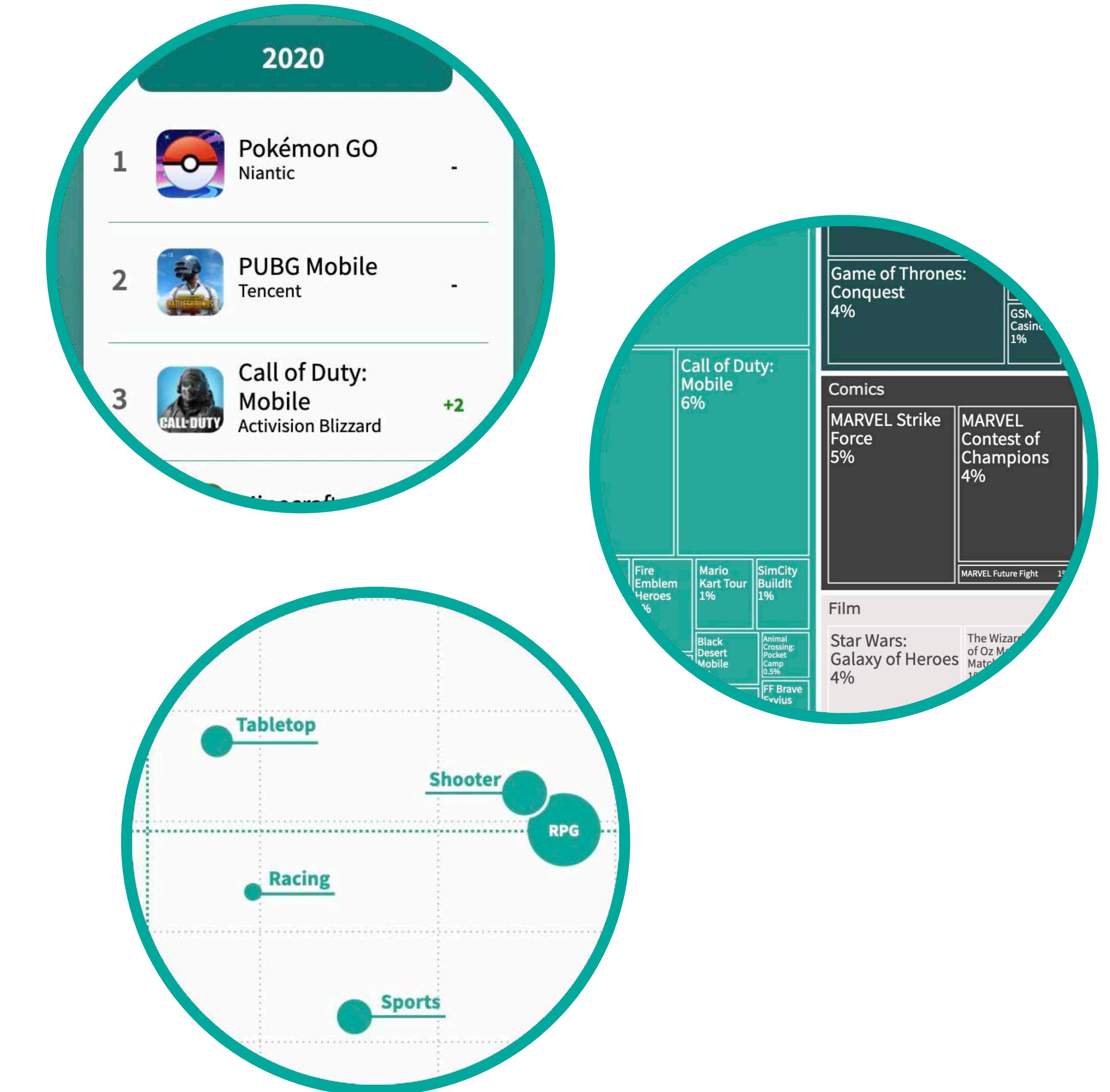


Conclusion

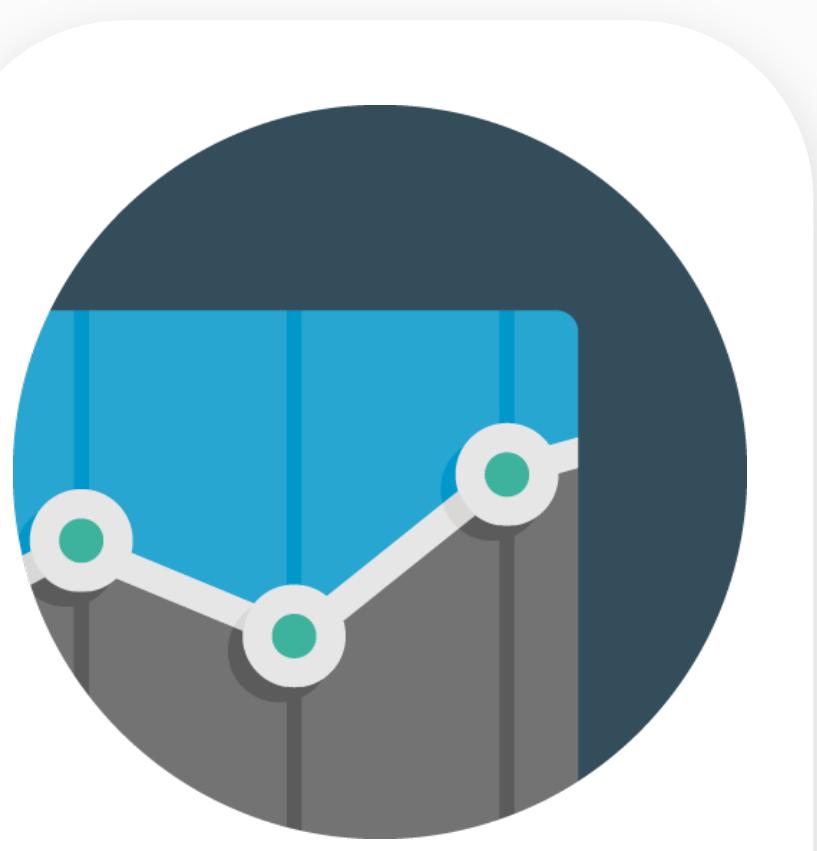
Conclusion

- While IP-based games only accounted for 9 percent of the U.S. mobile games market, they took an outsized market share for revenue and downloads, generating 23 percent of player spending and 17 of installs in 2020.
- Video game IPs accounted for a third of the revenue generated by licensed mobile games in 2020. This was followed by Manga at 13 percent, and Television at 12 percent. However, some of the top franchises, such as Marvel, extend beyond their original medium and into other sectors such as TV and film.
- Genres with the highest percentage of revenue from licensed games are associated with mid-core audiences: Action, RPG, and Shooter. Meanwhile, the Puzzle genre is one of the biggest markets in the U.S. but only 5 percent of its revenue comes from IP titles.

- With a shift in the marketing landscape post-IDFA, popular IPs could become more important in building awareness and acquiring players. Crash Bandicoot: On the Run launched in March 2021, accumulating 23.6 million downloads in its first week.
- Other licensed titles on the horizon include Diablo Immortal, Apex Legends, and Battlefield. These launches emphasize the current trend of strong growth seen among Shooter and RPG titles utilizing licensed IP.

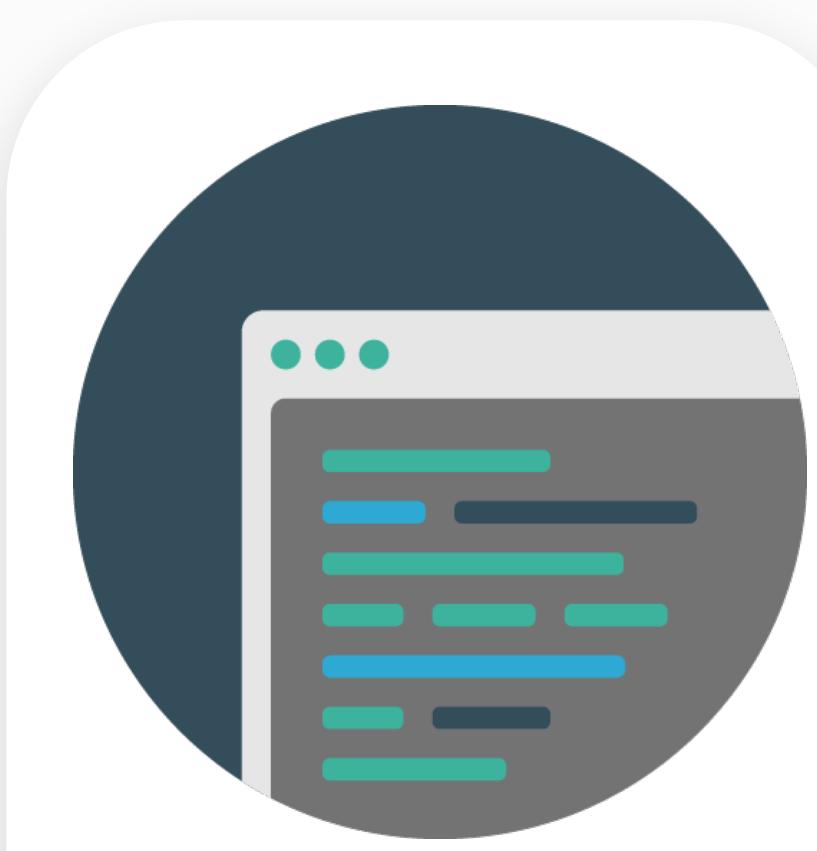


Sensor Tower Solutions



Store Intelligence

Make strategic decisions with the industry's most accurate estimates.



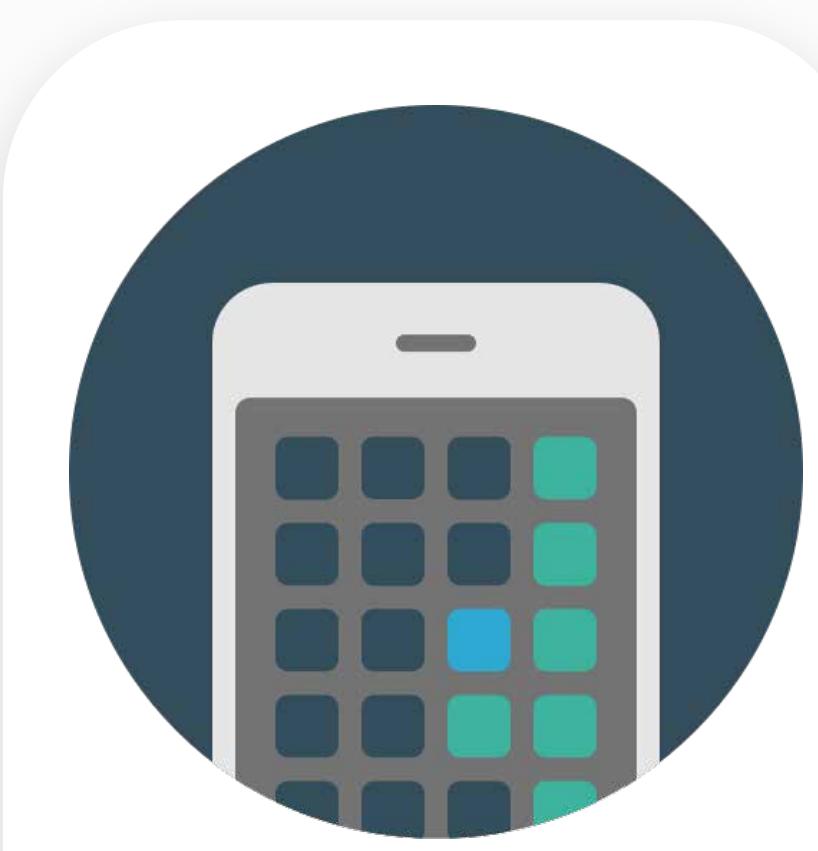
App Intelligence

Drive organic growth with the leading App Store Optimization platform.



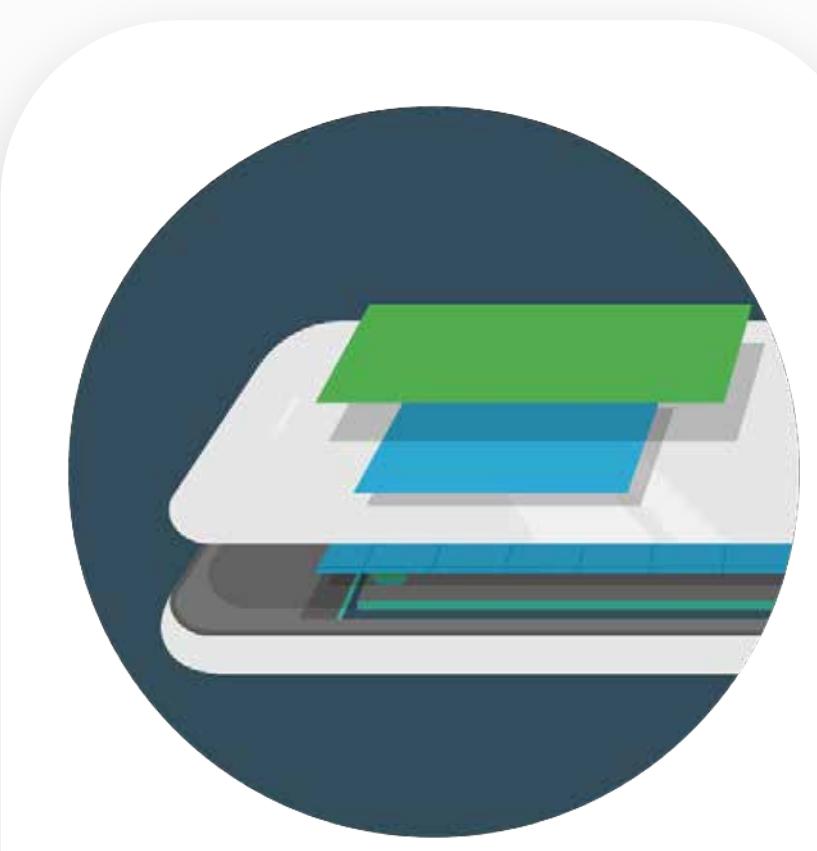
Ad Intelligence

Develop winning User acquisition campaigns with crucial mobile advertising insights.



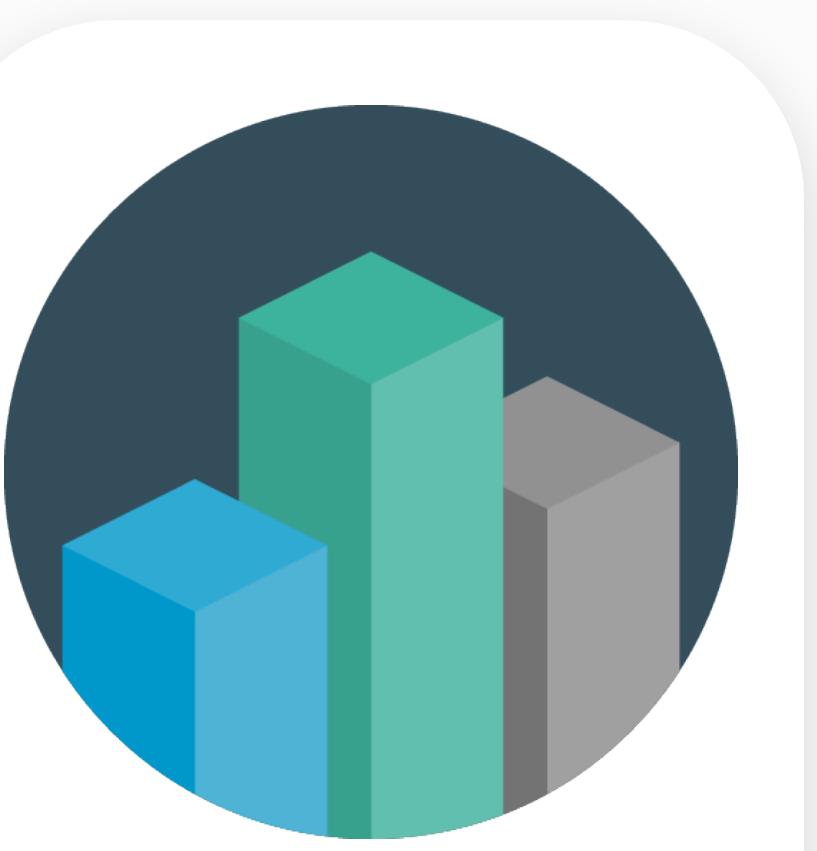
Usage Intelligence

Benchmark app usage, engagement, and demographics.



App Teardown

Evaluate which SDKs apps are using and measure SDK adoption across market segments.



Consumer Intelligence

Access unfiltered mobile user engagement for financial analysis.

Sensor Tower

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