

GameRefinery
By Vungle

Strategy Genre Snapshot

October 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
- In this report we are focusing on the **Strategy genre under Mid-core**



GameRefinery's Genre Taxonomy

Short Strategy Genre Overview



Erno Kiiski

Chief Game Analyst - US

The Strategy genre has always been one of the cornerstones of modern midcore/hardcore mobile gaming. For example, it is the third biggest genre in the US, with about 17% of the market share. Games like Clash of Clans and Game of War – Fire Age were among the super hits in the early days of smartphone gaming, and the genre hasn't stopped there. If we look at the current statistics for the genre, it is VERY MUCH driven by 4X strategy. For example, from the current top-grossing 200 strategy games in US iOS, 20 out of 25 falls under the 4X strategy subgenre. Interestingly 3/5 of these games that are NOT 4X strategy games are Supercell's games.

But even though the 4X strategy has dominated the genre, the trend of implementing elements from other genres into 4X continued among the top games. For example, Top War (merge) has been scaling a lot, and Puzzles & Survival (match3) entered the top charts as a new game.

MOBA is a historically tough subgenre for the US mobile market, with only Mobile Legends: Bang Bang + Brawl Stars able to sustain among top-grossing 200 games. The past 12 months saw launches of League of Legends: Wild Rift and Pokémon UNITE (only a few days ago when writing the report). LoL had a strong launch, and the game is super solid, but ever since the launch, it has struggled with its monetization and has already dropped outside top-grossing 200 games in the US. Will LoL turn their boat around, or can Pokémon UNITE sustain its position to get more MOBA action for the US top charts in the long run? That remains to be seen.



Key points



Erno Kiiski

Chief Game Analyst - US



- Currently, Strategy is the third biggest genre in the US iOS market, contributing about 17% of the market's revenues.
- 4X strategy success found with “genre-blending” continues (=bunch of elements outside of traditional 4X strategy mechanics implemented on top of 4X Strategy features to appeal to a wider audience).
- Top War (merge elements) scaled heavily this year
- New game Puzzles & Survival (match3 elements) entered the top of the charts
- State of Survival (RPG/line-defense elements) took the top spot of 4X strategy subgenre
- Supercell (dominating player in Strategy outside 4X strategy subgenre) is back on a positive track after a period of decline
- Long term power progression, strong event loops, and social elements are the cornerstones of most modern mobile 4X Strategy games
- Strategic resource optimization with a very competitive social landscape motivate most Strategy players











Market

- Top games and their market share



Top games and their current market share within the **Strategy** genre in the US on iOS

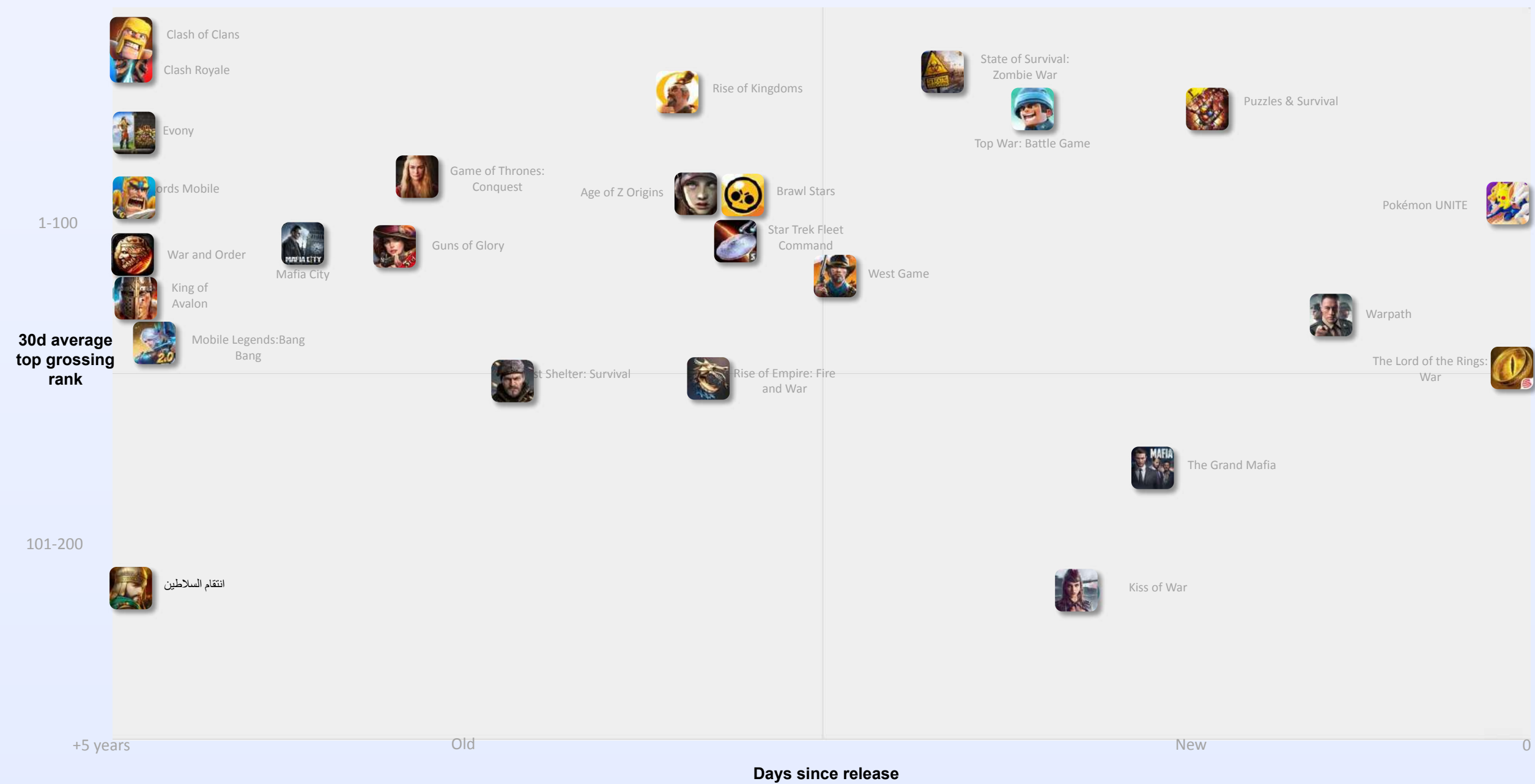
Key takeaway: 1) Only one brand new game within the top 10 grossing strategy games during the past year, Puzzles & Survival. 2) Supercell is the only company with other types of Strategy games in the top 10 other than 4X Strategy. 3) All Supercell's games have turned the tide back to a positive trend after a longer period of decline. 4) Top War scaled heavily with a massive revenue increase compared to the situation last year.

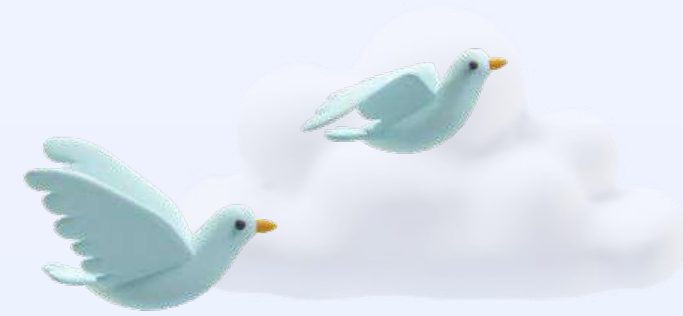
Strategy		2021 Q2		2020 Q2	
<input type="checkbox"/> Show genre share ?		Rev	Change	Rev	Change
	1. Clash of Clans Supercell Build & Battle	\$29.68m	+6.01m	\$23.67m	-6.01m
	2. Clash Royale Supercell Tactical Battle	\$16.81m	+7.05m	\$9.76m	-7.05m
	3. State of Survival Walking Dead KingsGroup International AG 4X Strategy	\$13.50m	+4.37m	\$9.13m	-4.37m
	4. Rise of Kingdoms Lilith Games 4X Strategy	\$11.85m	-660.50k	\$12.51m	+660.50k
	5. Top War: Battle Game Topwar Studio 4X Strategy	\$10.99m	+9.43m	\$1.56m	-9.43m
	6. Puzzles & Survival 37GAMES 4X Strategy	\$9.98m	+9.98m	\$-	-9.98m
	7. Evony TOP GAMES INC. 4X Strategy	\$9.35m	+5.49m	\$3.86m	-5.49m
	8. Lords Mobile: Tower Defense IGG.COM 4X Strategy	\$9.02m	+107.30k	\$8.92m	-107.30k
	9. Game of Thrones: Conquest™ Warner Bros. 4X Strategy	\$8.68m	-2.49m	\$11.16m	+2.49m
	10. Brawl Stars Supercell Multiplayer Battle Arena	\$7.84m	+2.57m	\$5.27m	-2.57m

*

Top games and challengers in the Strategygenre (US iOS)

Key takeaway: The strategy market in the US is very crowded, and most of the top-grossing games are getting quite old. Most noteworthy new additions during the past year: Puzzles & Survival, Warpath. Pokémon UNITE + The Lord of the Rings: War are JUST released games when this report was written, it remains to be seen how they sustain in the long run. Another interesting factor is that League of Legends: Wild Rift was released last year, but currently, it cannot sustain in the top-grossing 200 charts. MOBAs have had a tough time in the US mobile market, with only Mobile Legends / Brawl Stars maintaining their position in the top for an extended period. Will LoL turn their boat around, or can Pokémon UNITE sustain its position? That remains to be seen.

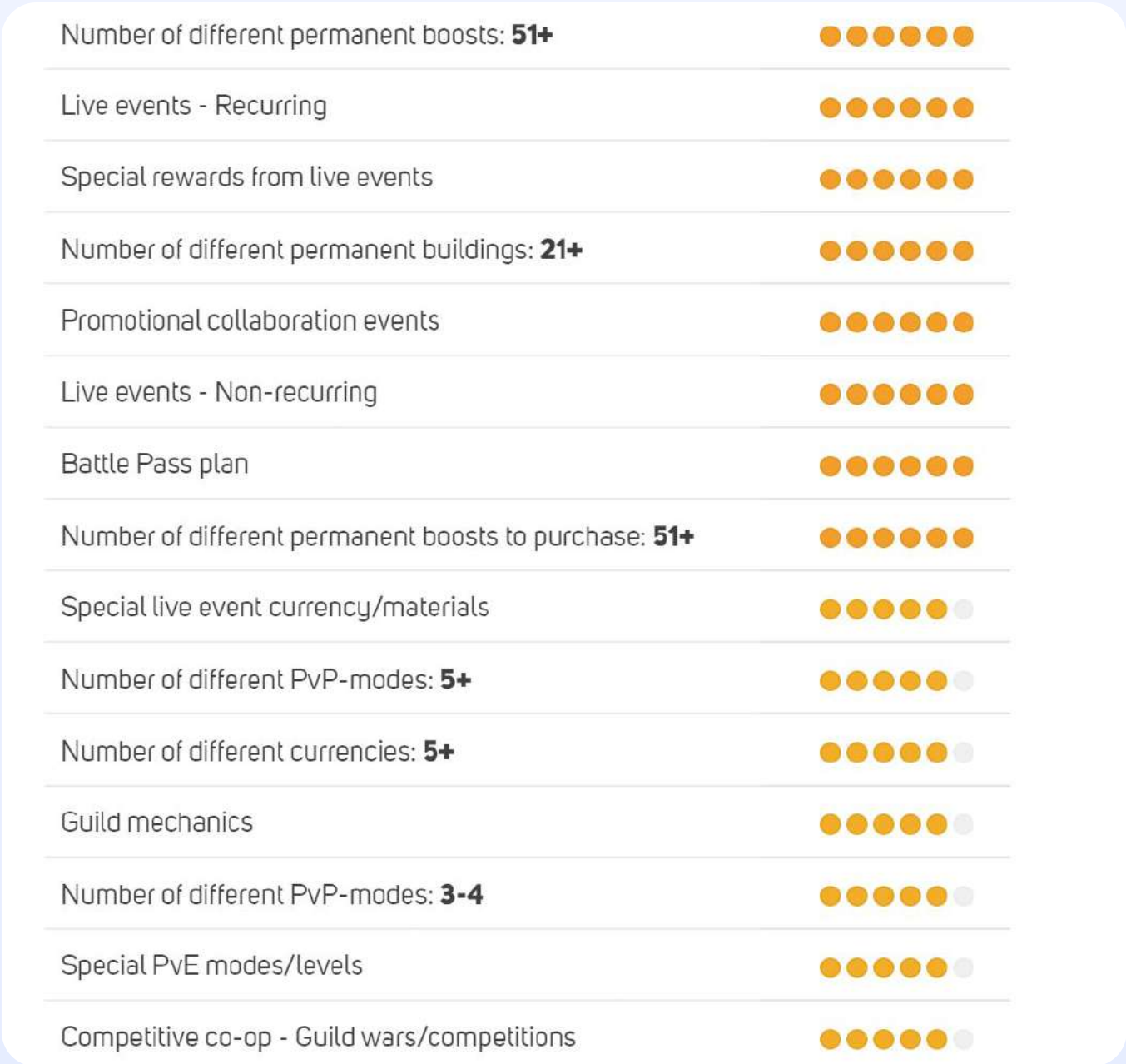




Features & Updates

- Top updates
- Implementation examples

Top features with the biggest importance within the 4X Strategy subgenre



Erno Kiiski
Chief Game Analyst - US

4X Strategy is the dominating subgenre in the Strategy genre. There are a couple of things that make these games tick that become quite clear when looking at the data.

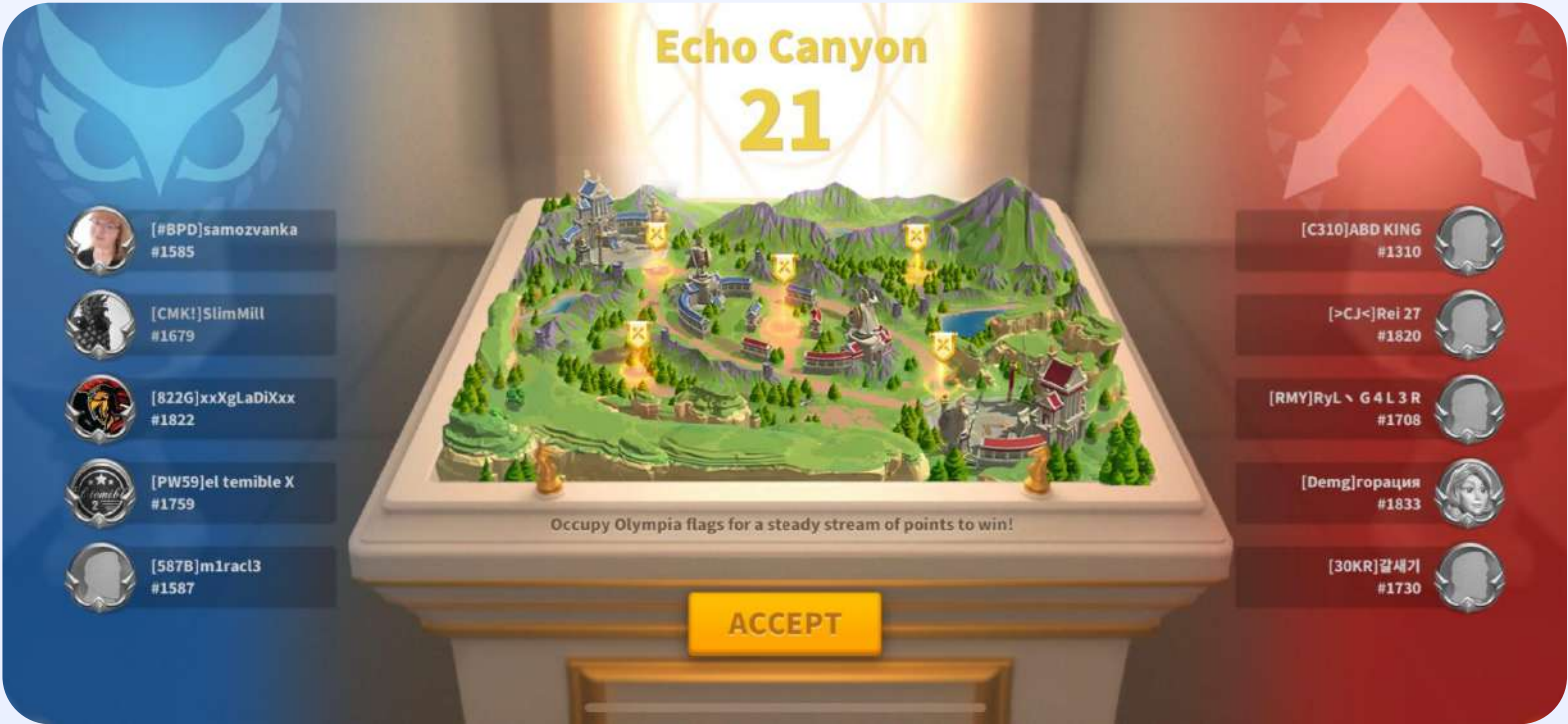
1) Long term progression loops with different kinds of permanent boosts/perks (such as technology trees), training/upgrading troops, constructing/upgrading buildings etc. often combined with a very rich/deep economy of several currencies. The possibility of constantly becoming more and more powerful is the main principle of most the Strategy games both in terms of engagement and monetization. (especially in 4X games which form the majority of the genre).

2) Complex live ops structures. Most strategy games have quite complex event calendars running several different types of recurring/non-recurring events to keep players engaged

3) Social is the key. If we look at top Strategy games, pretty much all of them are built on top of the idea of competition and social collaboration with other players.

Of course these are just a handful of features, check the GameRefinery service for more data on over 250 features.

Interesting feature additions from the past year: **Rise of Kingdoms – Champions of Olympia-game mode**



Rise of Kingdoms – Champions of Olympia



Erno Kiiski
Game Analyst

Massive update for Rise of Kingdoms is here. It includes for example new PvP mode, new faction, new champions, events etc.

1) Probably the biggest addition in a while, a new game mode **Champions of Olympia**, is added to the game. It is a new synchronous PvP game mode which will be open once in a while in it's own recurring event. In this game mode you choose 3 champions as your troops. This is a 5vs5 battle where you are matched with random people or you can also invite people to join your team. Then you are pitted against another team of 5. **The idea of this game mode** is to capture and hold objectives on the map. **Capturing the object** gives you points, so naturally the goal is to capture and hold more objectives than the opponent for the duration of the match. Whichever team has more points when the match ends, will be the winner. The map where the fighting happens has 5 capturable points which the teams are contesting to conquer for points. There are also **certain areas of the map also afflict various stat changes** to your troops (such as Road where troops move faster, Swamp where troops move slower and their defense drops or Replenishment Points where you can heal your troops). If any of your troops die, **it respawns** to your team's starting area after a cooldown counter.

You'll be able to **select skills/blessings** to help you on the battle. Each of them support different kind of play styles/tactics. Another interesting twist for the combat is **Morale**. All your troops have a morale meter. When your troops gets surrounded, units are countered or nearby ally falls, you lose morale and if you defeat opponents, you gain morale. You'll also gain morale slowly back if you're not in battle. How it affects everything then? If your troops' morale drops to zero, they will have severe fighting power decrease.

This game mode has clearly taken a lot of influences from MOBAs with its structure, but has still the familiar RoK strategy combat.

Source: GameRefinery SaaS platform – Update Comment

See more screenshots of the feature in the GameRefinery service!!

Interesting feature additions from the past year:

State of Survival x Walking Dead- collaboration



State of Survival – Walking Dead collaboration

Collaboration events are an ever-increasing way for mobile games to create engagement and offer something new (43% of the US iOS top 100 grossing games have had these types of IP-collaboration events). But often, these events run for a couple of weeks or so, but State of Survival went FULL-ON with its collaboration with Walking Dead. The massive event spans almost a year now with tons of content ranging from a new game mode to characters familiar from the TV show/comics to collect.

This collaboration has been one of the factors, alongside other mega-events brought to the game, that has contributed to the even bigger scale that this game has been able to gain. This has resulted in it becoming the biggest 4X strategy game in revenues in the US over the past 12 months.



[See in-depth updates and mechanics for this collaboration and others by checking out the GameRefinery's game Update History!](#)






Motivations

- The motivation framework
- Strategy player motivational profile



GameRefinery's Motivation Framework

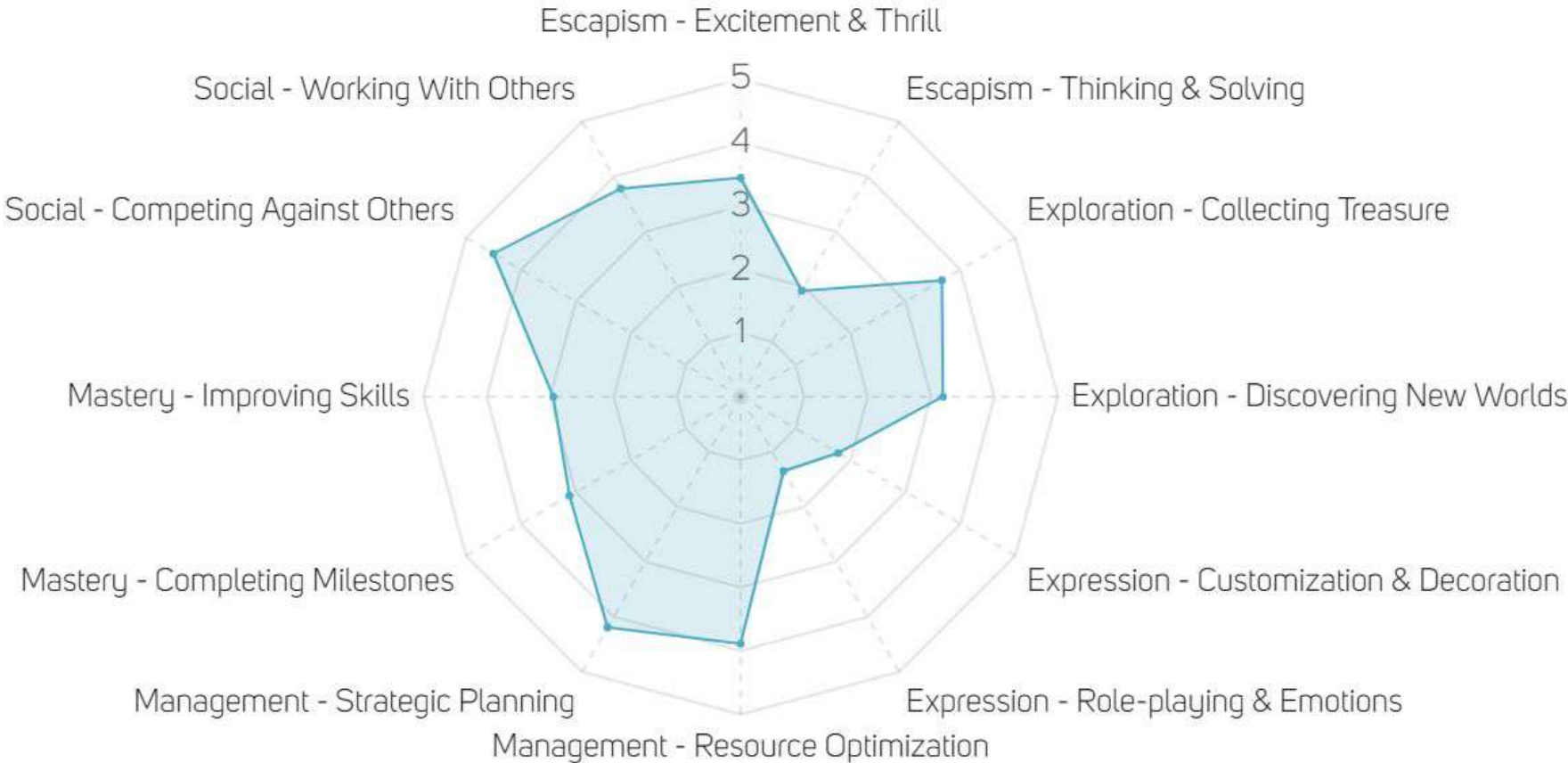
- GameRefinery uses a proprietary motivation model consisting of twelve different Motivational Drivers, each covering a separate player root motivation.
- These Motivational Drivers are also grouped based on their nature to form meaningful pairs or “motivational groups” - for example Improving skills 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



Motivational Drivers of the Strategy games

Motivational drivers describe the main reasons players enjoy playing the game



Erno Kiiski

Chief Game Analyst - US

Looking at the average motivational map of Strategy games, we can see in one quick glimpse what are the primary motivators for most Strategy players. Naturally, management-related factors, exploration, and highly competitive elements rise as the key motivators for mobile strategy players.



Erno Kiiski

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

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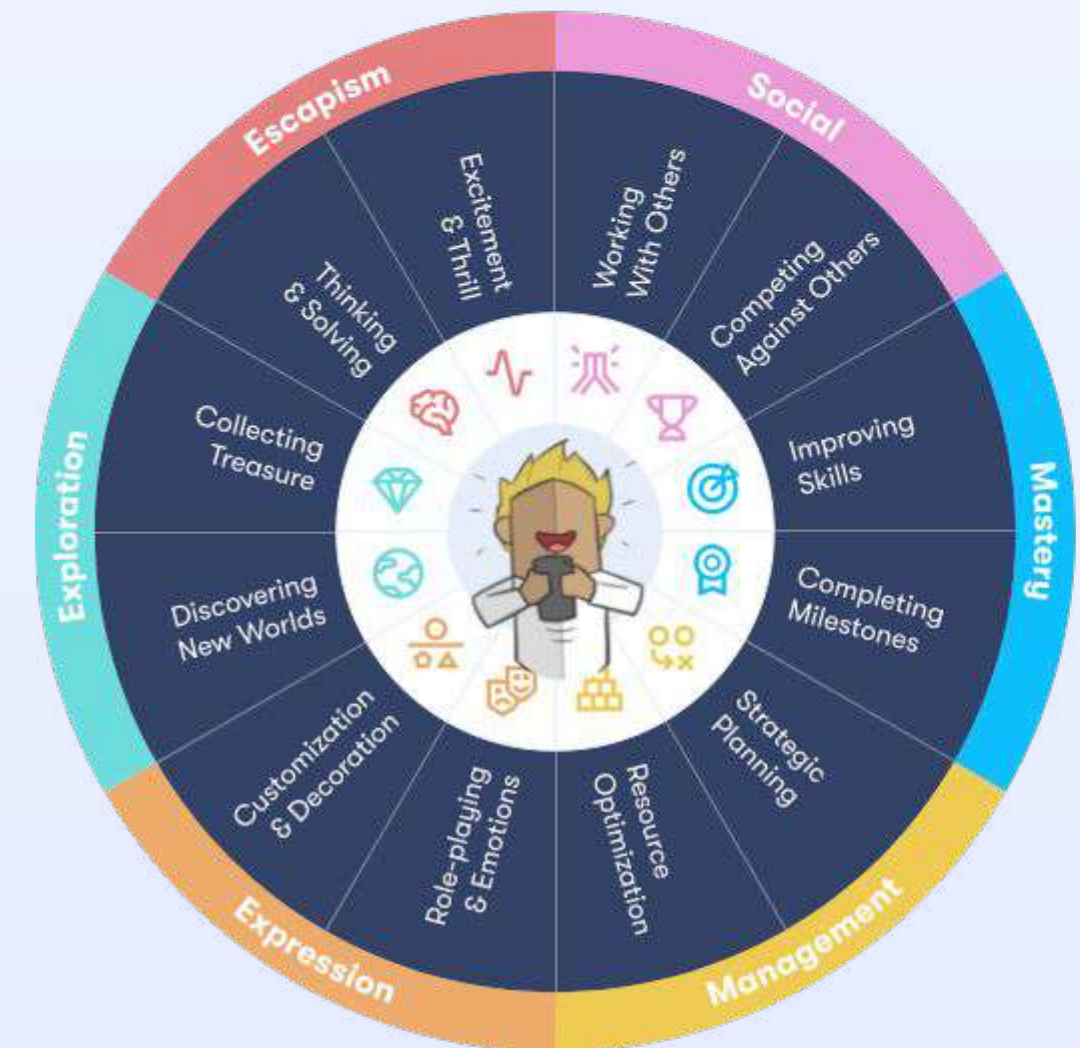
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We answer not just **what** is happening on the market but **why** and **how** it is happening



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12 Player Motivations



1. Choose Market

US

2. Select optional categories

GENRES

Casual, Mid-core

SUBGENRES

Build & Battle

3. Select optional Filter

Session Length Game Progression

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