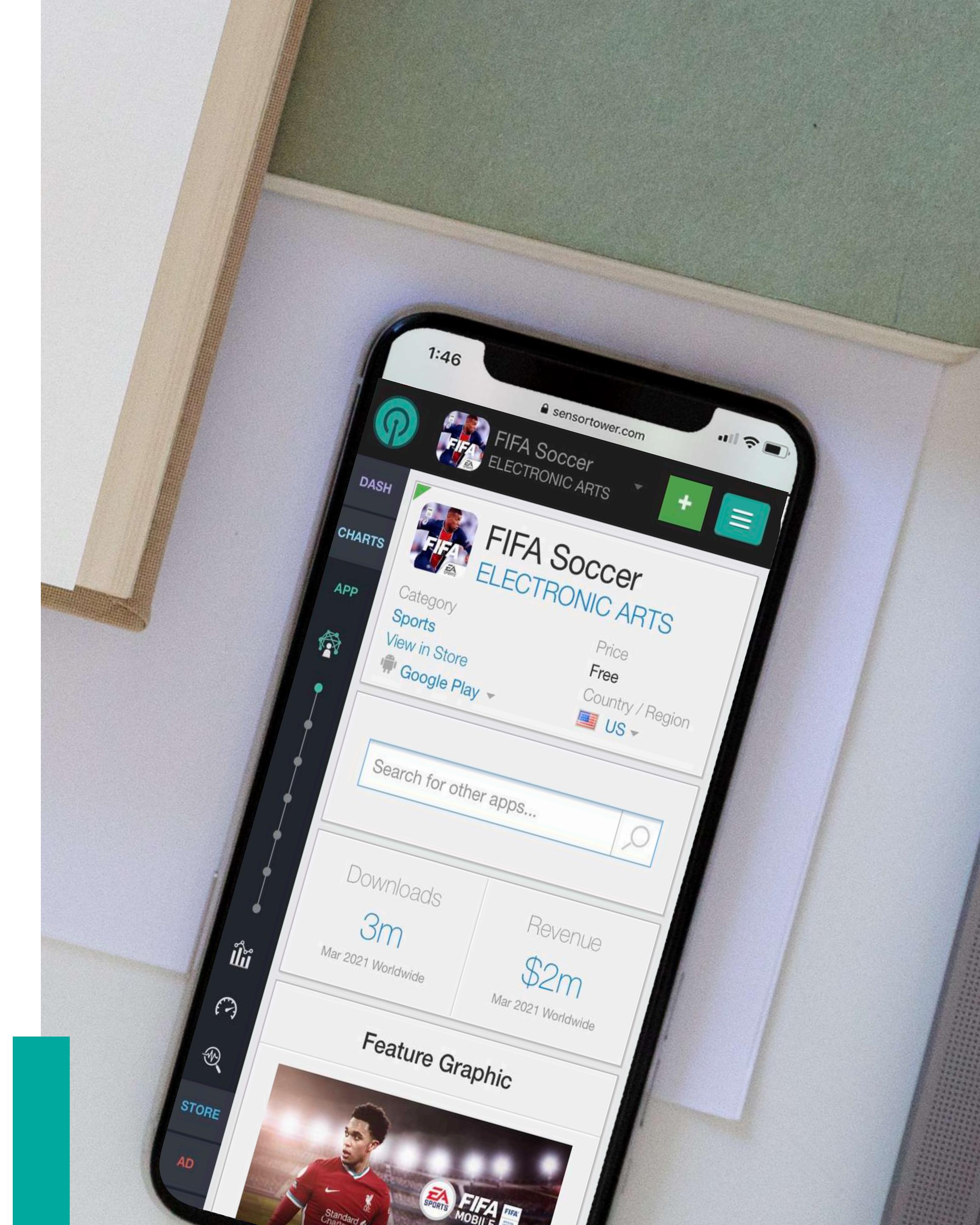


# Sports & Racing Games Report

Q3 2021



# About This Data: Methodology

## 1. Estimates:

The estimates provided in this report were compiled using the Sensor Tower platform. Unless specified to the contrary, figures in this report reflect worldwide Unified estimates (i.e. App Store and Google Play) for the period of January 1, 2020 through June 30, 2021.

## 2. Revenues:

Revenue includes app price, subscriptions, and in-app purchases only and are calculated on a net revenue basis (i.e. minus platform fees).

## 3. Downloads:

Download estimates presented are on a per-user basis, meaning that only one download per user account is counted towards the total. Downloads of the same app by the same user to multiple devices, updates, or re-installs of the same app by the same user are not counted towards the total.

# Executive Summary: Highlights



**Sports category revenues increased significantly in 2020.** In 2020, the category had a total of \$2B revenues, with a YoY growth of 40.2%. Realistic Sports sub-genre outperformed Arcade Sports and Sports Manager



**Racing category has seen an increasing downloads trend since Q3 2019.** The pandemic caused a large spike in downloads in Q2 2020. The category had a total of 1.9B downloads in 2020, with a YoY growth of 22.3%



**Japan dominates in total revenues for Soccer and Baseball games, while China is the top market for Basketball titles.** US dominates in revenues for Sports such as Golf, Fishing and Alternative sports



**Kart Racing generates more revenue than any other Racing sub-genre, with only 15 titles in the market.** Kart Racing titles are hits in Asia, specifically China, where IP-based titles like Mario and KartRider lead the charts

# Table of Contents: Topics Covered

*This report analyzes the Sports and Racing Categories on the following aspects:*

## Sports Category

### 5. Category Overview

Top titles, top publishers, download and revenue trends, market breakdown, M&A, IP games, soft launch titles and usage data.

### 17. Arcade Sports

Themes, country breakdown, market share of top titles and publishers

### 25. Realistic Sports

Themes, country breakdown, market share of top titles and publishers

### 33. Sports Manager

Themes, country breakdown, market share of top titles and publishers

## Racing Category

### 39. Category Overview

Top titles, top publishers, download and revenue trends, market breakdown, M&A, IP games, soft launch titles and usage data.

### 52. Arcade Racing

Themes, country breakdown, market share of top titles and publishers

### 61. Drag Racing

Themes, country breakdown, market share of top titles and publishers

### 70. Kart Racing

Themes, country breakdown, market share of top titles and publishers

### 78. Racing Simulator

Themes, country breakdown, market share of top titles and publishers

### 86. Conclusion

Key takeaways

# Sports Category Overview

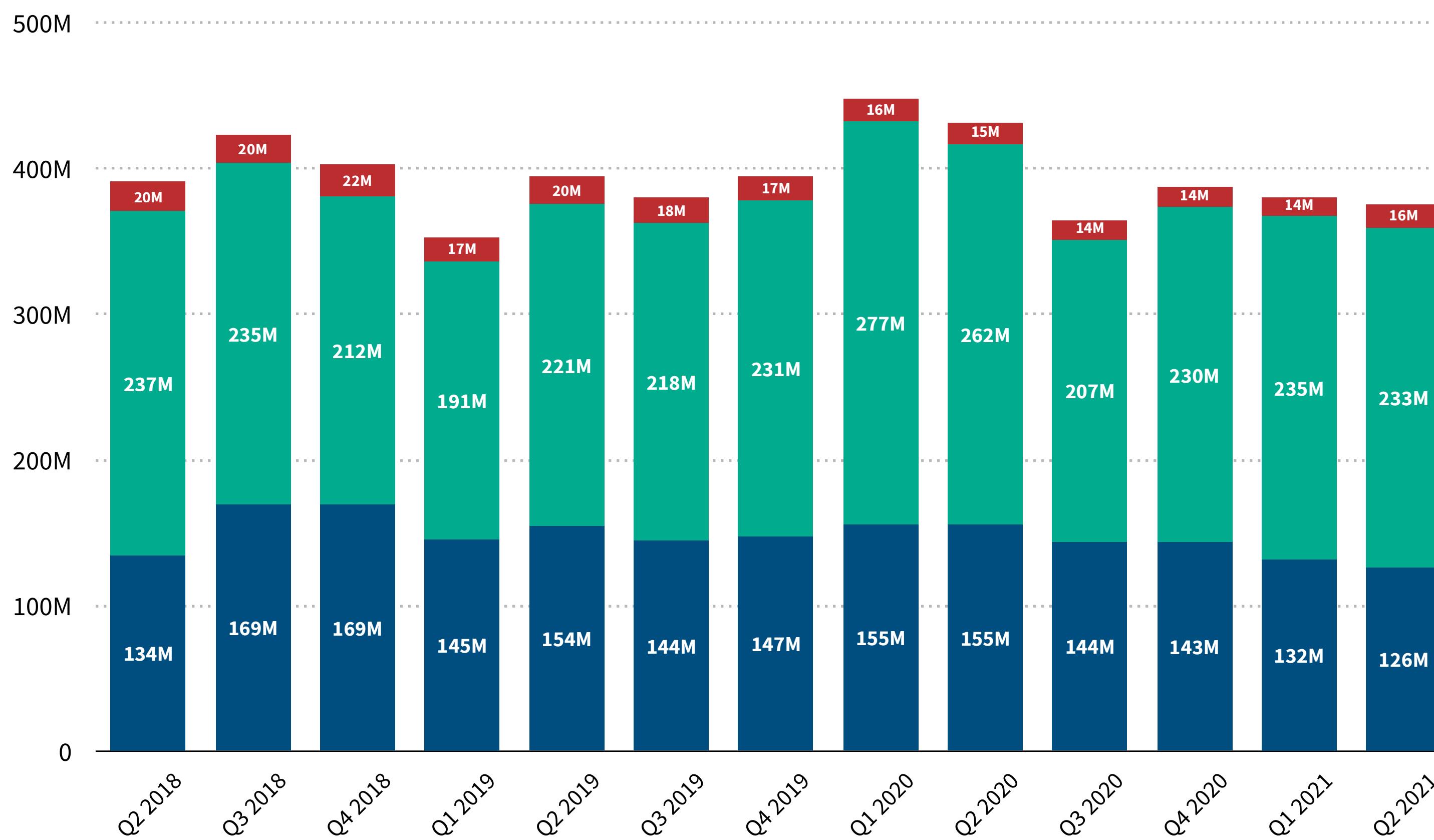


# Stable Download Trend for Sports Category

Global quarterly downloads of Sports games by sub-genres

[View in Game Intelligence](#)

■ Arcade Sports ■ Realistic Sports ■ Sports Manager



The Sports category has seen an overall stable download trend over the last 3 years

The pandemic caused an increase in downloads from 395M in Q4 2019 to 448M in Q1 2020. Downloads decreased thereafter and have normalized to pre-Covid levels

In 2020, the category had a total of 1.6B downloads, with a YoY growth of 7.1%

Realistic Sports had a YoY growth of 14% in 2020, significantly outperforming Arcade Sports (YoY growth of 0%) and Sports Manager (YoY decline of 19%)

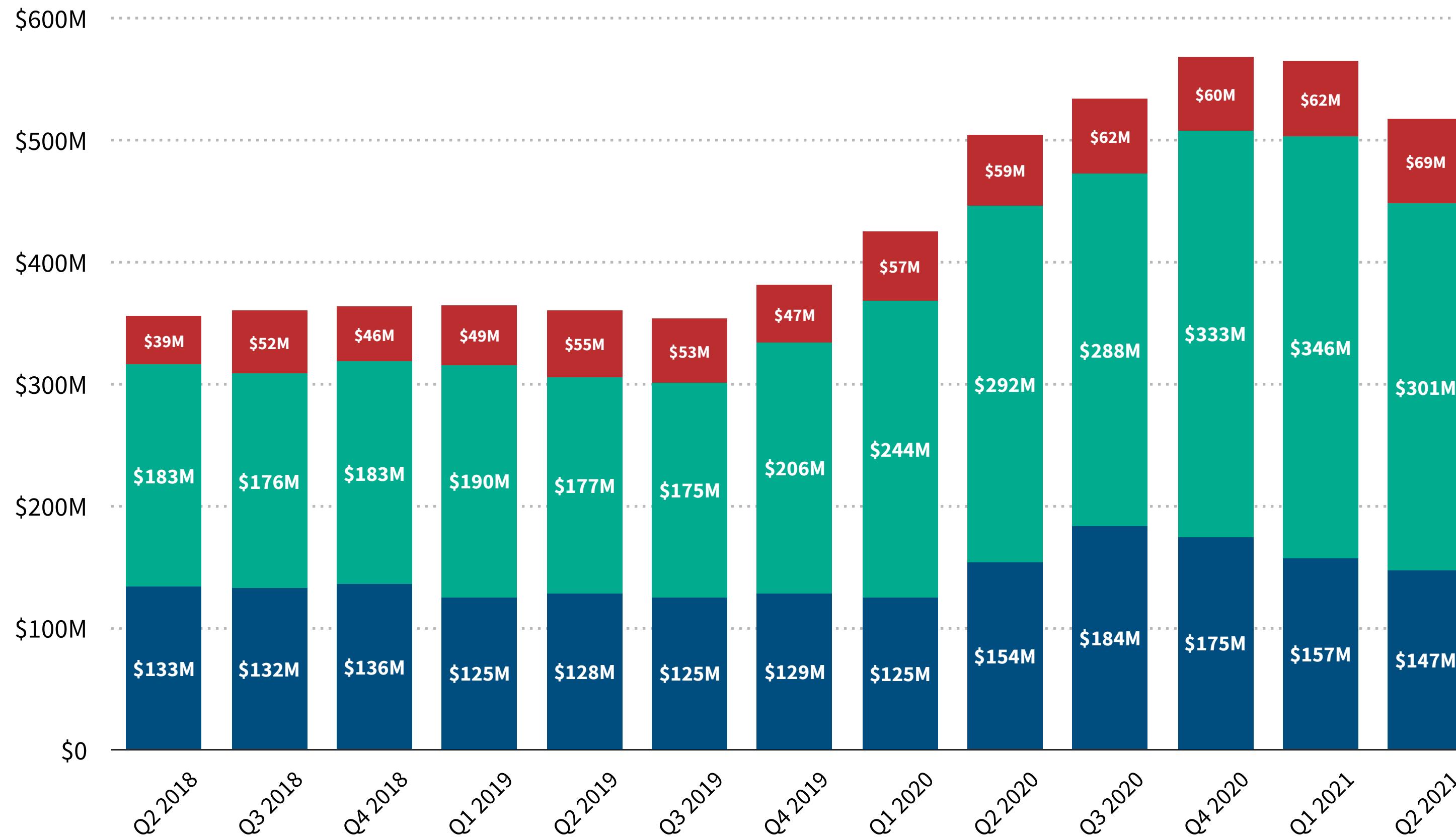
Android accounted for 84% of total downloads from Jan 2018 to Mar 2021

# Revenues in Sports Category Increased in 2020

*Global quarterly revenues of Sports games by sub-genres*

[View in Game Intelligence](#)

■ Arcade Sports ■ Realistic Sports ■ Sports Manager



Revenues of the Sports games category increased in every quarter of 2020

The pandemic seems to have caused a large impact on revenues

Revenues peaked in Q4 2020 at \$567M. In 2020, the category had a total of \$2B revenues, with a YoY growth of 39.2%

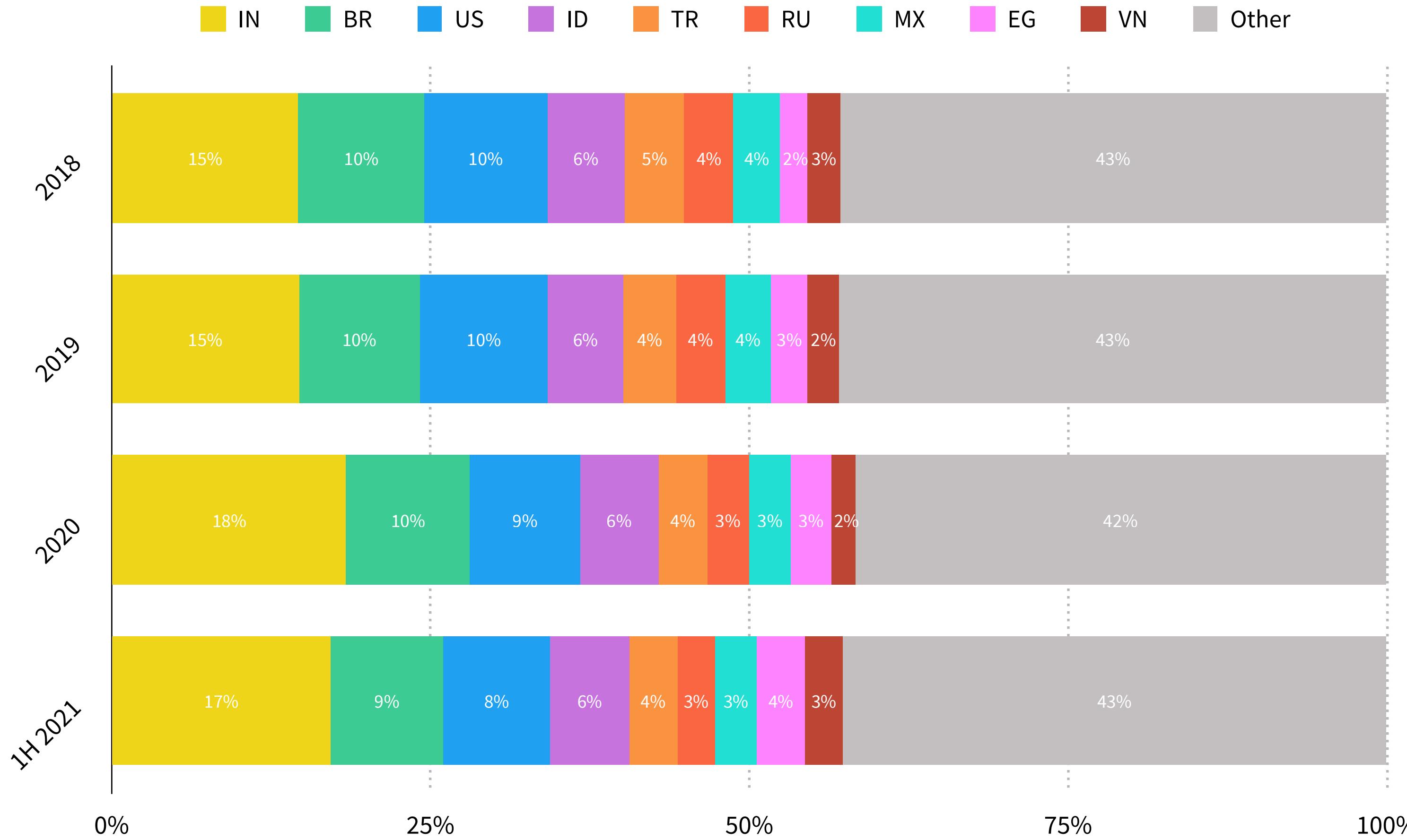
**Realistic Sports** had a YoY growth of 54% in 2020, significantly outperforming **Arcade Sports** (YoY growth of 27%) and **Sports Manager** (YoY growth of 19%)

iOS accounted for 61% of total Revenues from Jan 2018 to Mar 2021

# India Has Most Downloads Share in Sports Category

*Sports category download share by country*

[View in Game Intelligence](#)



The top 5 countries with the highest downloads share from Apr 2018 to June 2021 are:

- India (16%)
- Brazil (10%)
- US (9%)
- Indonesia (6%)
- Turkey (4%)

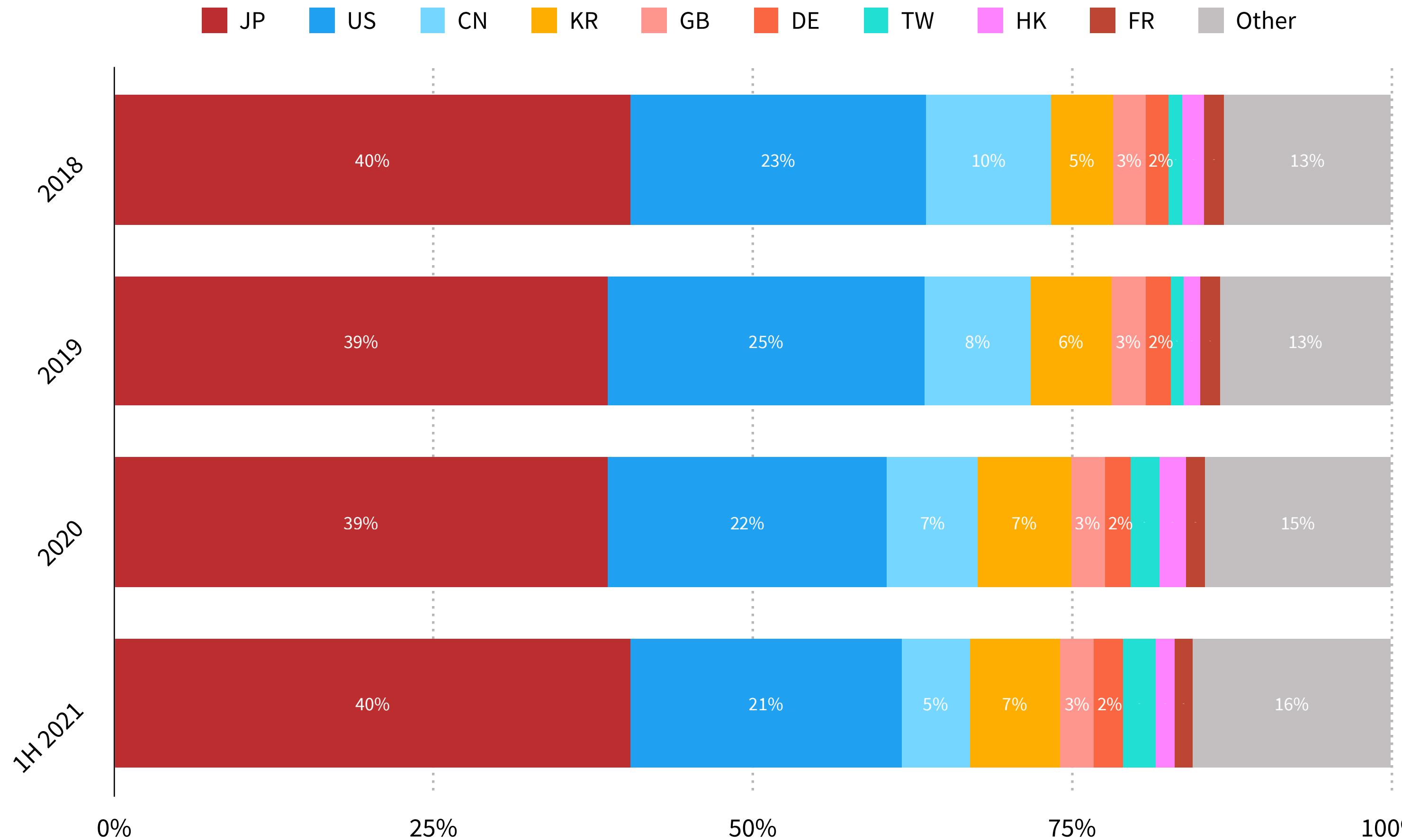
US dipped slightly in overall downloads share in 2020 and 1H 2021, while countries like India and Egypt captured more market share

Downloads increased significantly in India during the pandemic as India's market share grew from 14% in 2019 to 18% in 2020.

# Most Revenues Are Generated From Japan and US

*Sports category revenue share by country*

[View in Game Intelligence](#)



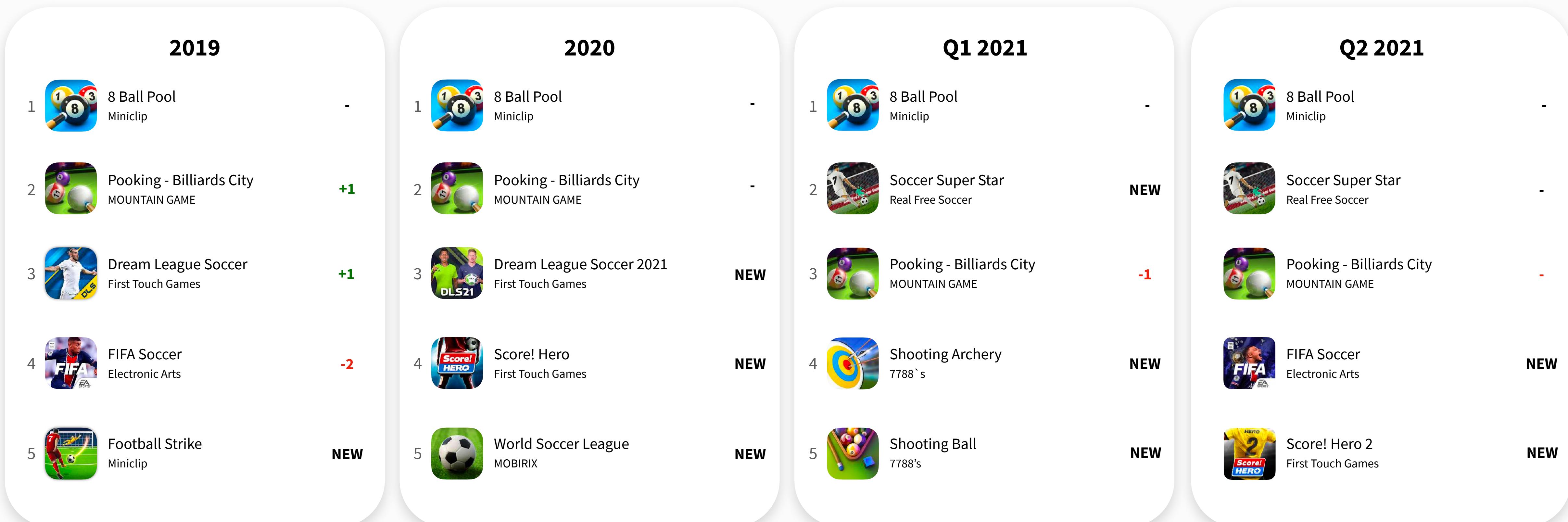
The top 5 countries with the highest revenue share from Apr 2018 to June 2021 are:

- Japan (39%)
- US (23%)
- China (8%)
- South Korea (7%)
- Great Britain (3%)

US and China have lost market share in 2020 and 1H 2021, with China's market share declining from 10% in 2018 to 5% in 1H 2021

# 8 Ball Pool and Soccer Titles Are Most Downloaded Sports Games

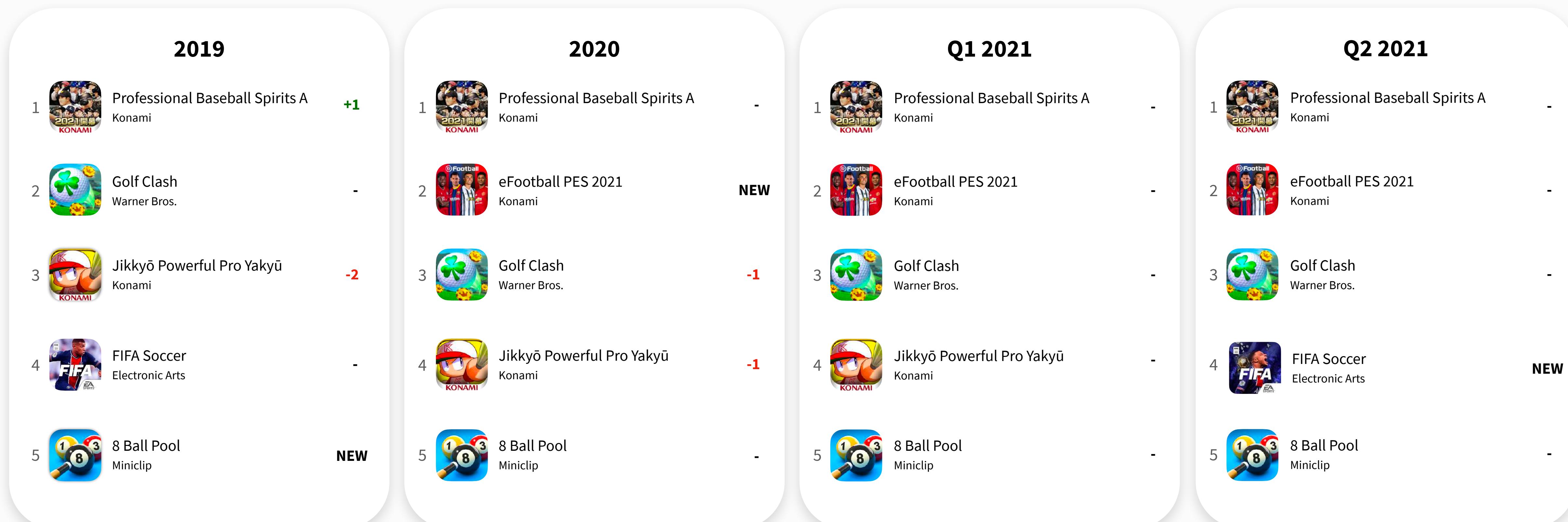
*Most installed Sports games on App Store and Google Play by year*



Sports Category Overview

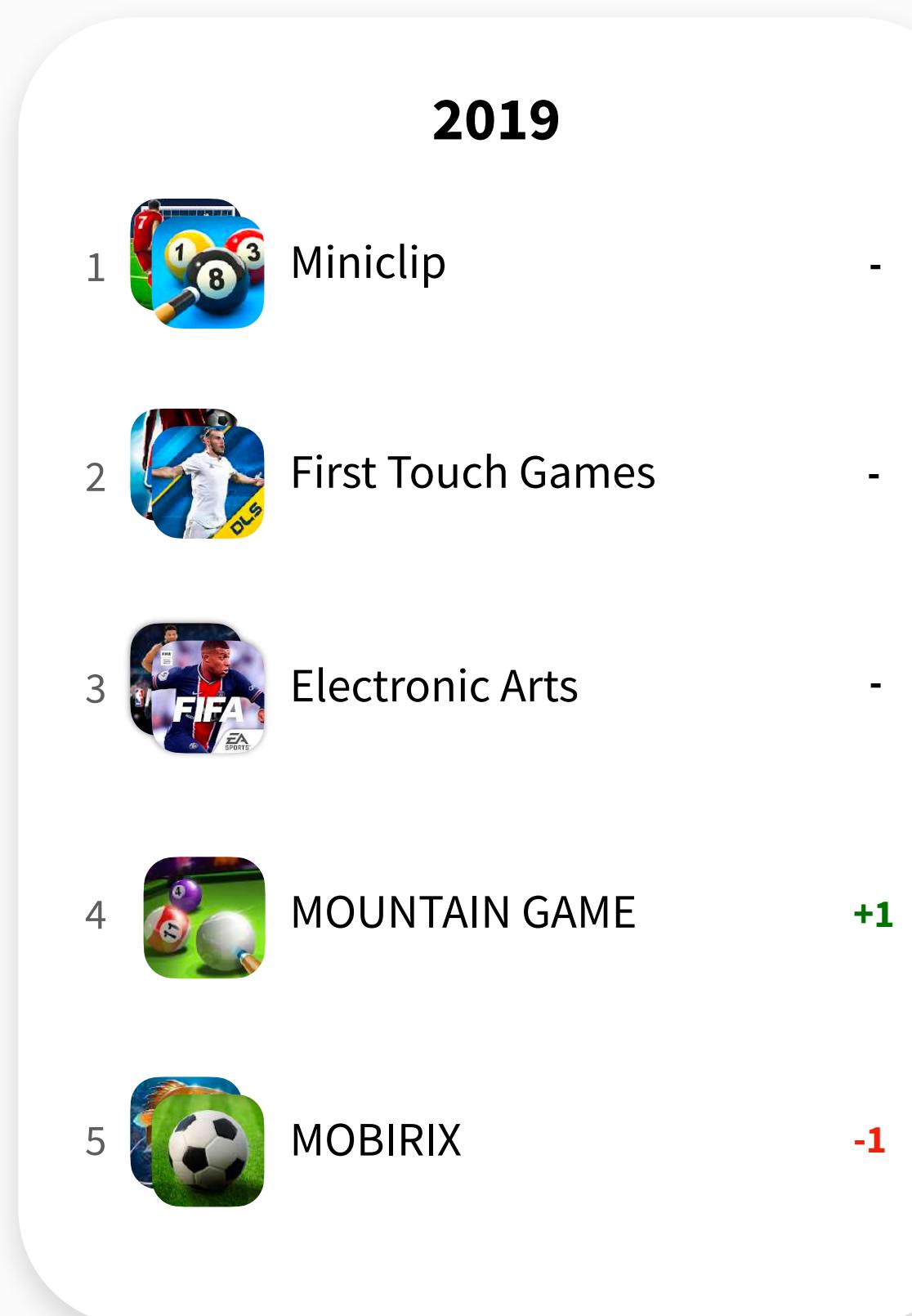
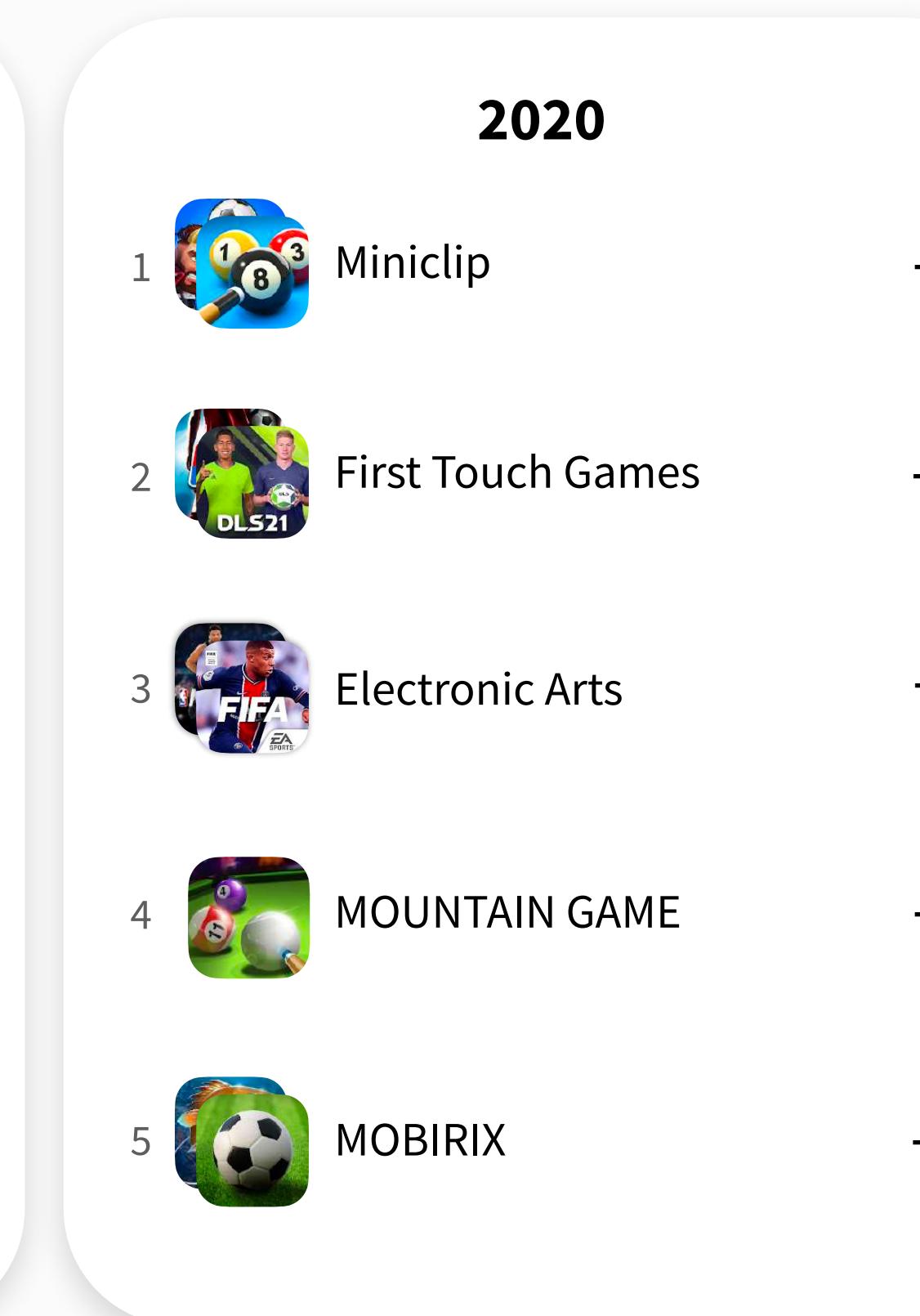
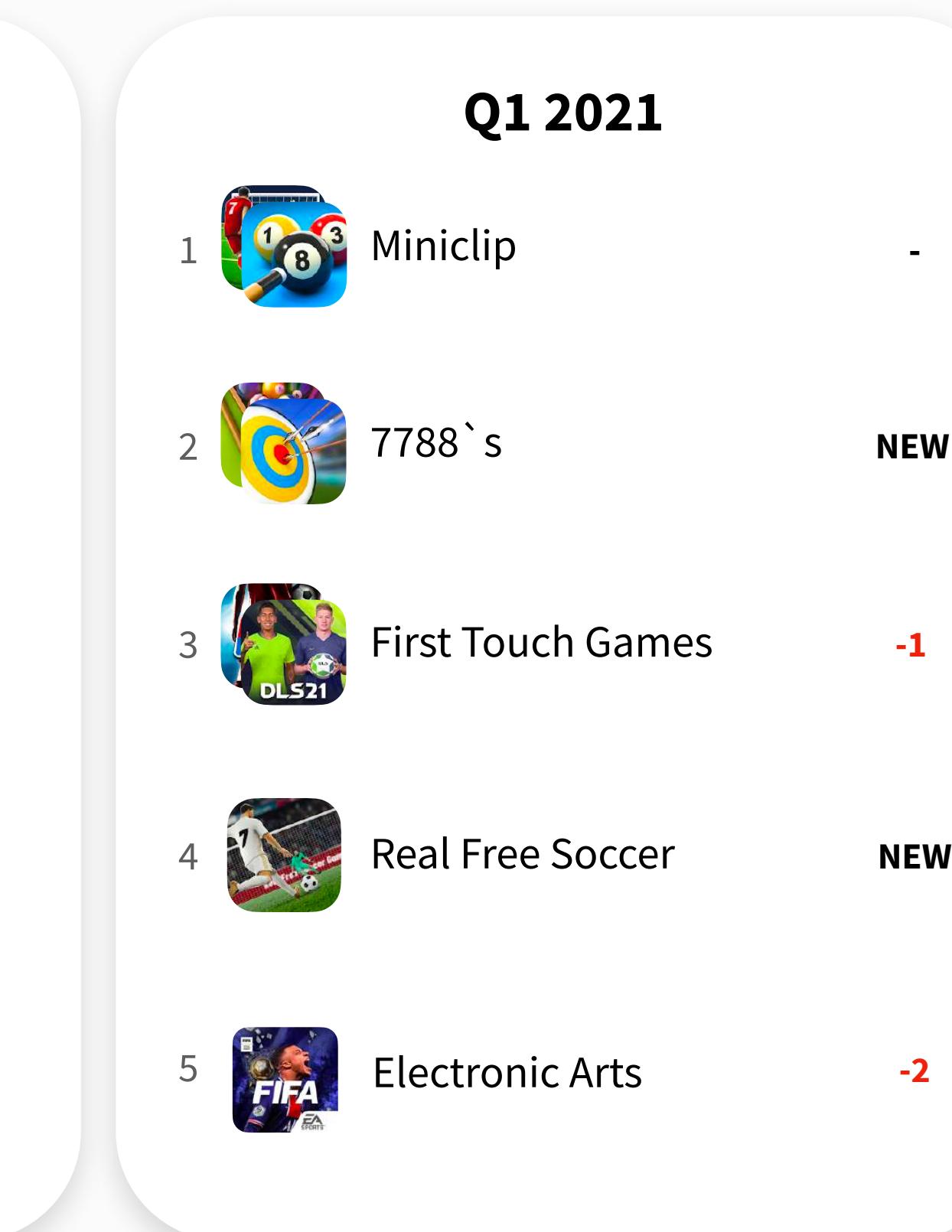
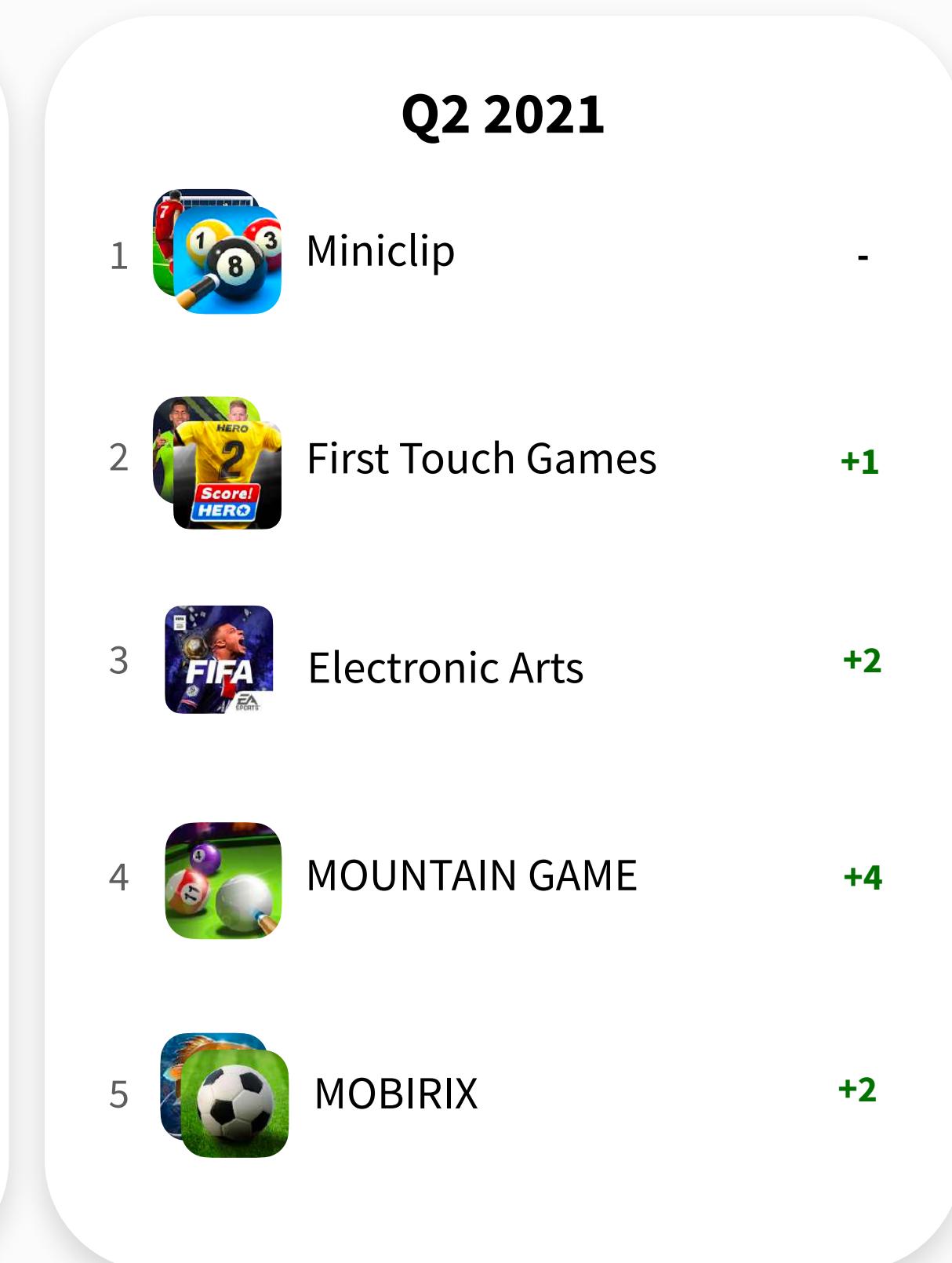
# FIFA Soccer displaced one of the Konami Baseball games in Q2 2021

Highest grossing Sports games on App Store and Google Play by year


[View in Store Intelligence](#)
[View in Store Intelligence](#)
[View in Store Intelligence](#)
[View in Store Intelligence](#)

# Miniclip and First Touch Games Are Top 2 Publishers for Downloads

*Most popular Sports publishers by downloads on App Store and Google Play by year*


[View in Store Intelligence](#)

[View in Store Intelligence](#)

[View in Store Intelligence](#)

[View in Store Intelligence](#)

# Konami Captures Most Revenues, Followed by Miniclip, WB and Electronic Arts

*Most popular Sports publishers by revenues on App Store and Google Play by year*

**2019**



Konami

-



Warner Bros.

+1



Electronic Arts

-1



Miniclip

-



Tencent

-

[View in Store Intelligence](#)

**2020**



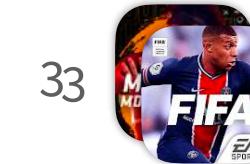
Konami

-



Miniclip

+2



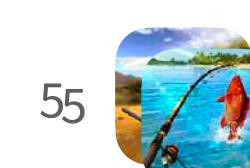
Electronic Arts

-



Warner Bros.

-2



Ten Square Games

NEW

[View in Store Intelligence](#)

**Q1 2021**



Konami

-



Miniclip

-



Warner Bros.

+1



Electronic Arts

-1



Ten Square Games

-

[View in Store Intelligence](#)

**Q2 2021**



Konami

-



Miniclip

-



Electronic Arts

+1



Warner Bros.

-1



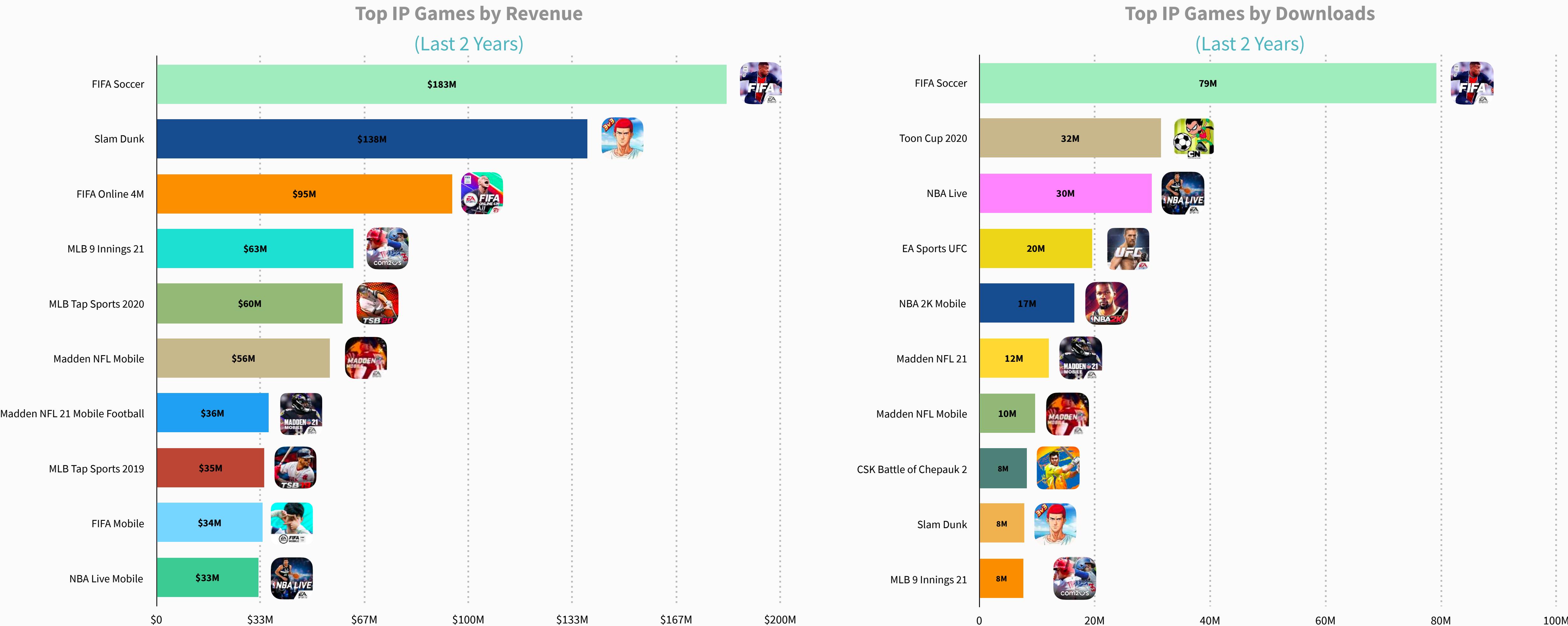
Ten Square Games

-

[View in Store Intelligence](#)

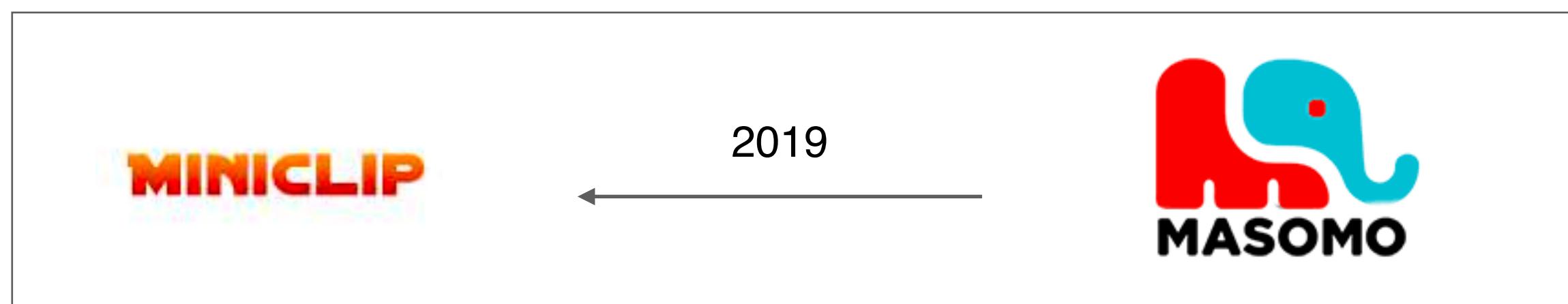
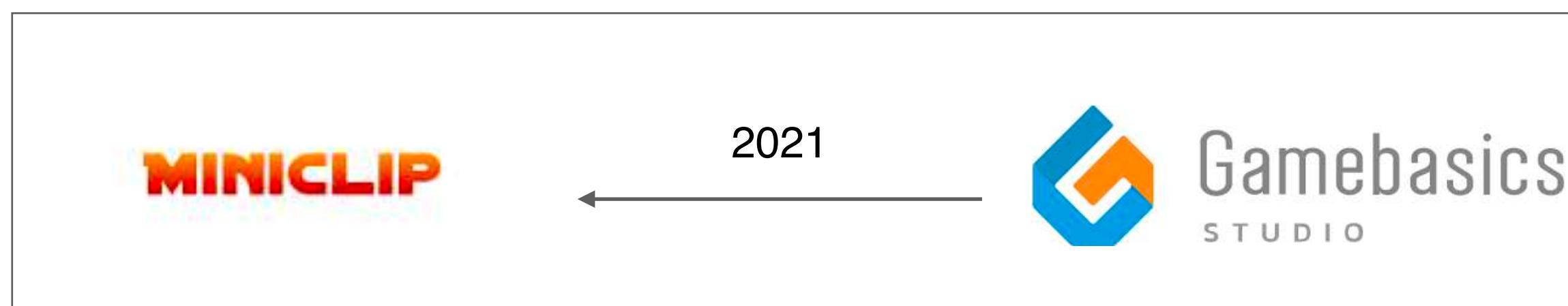
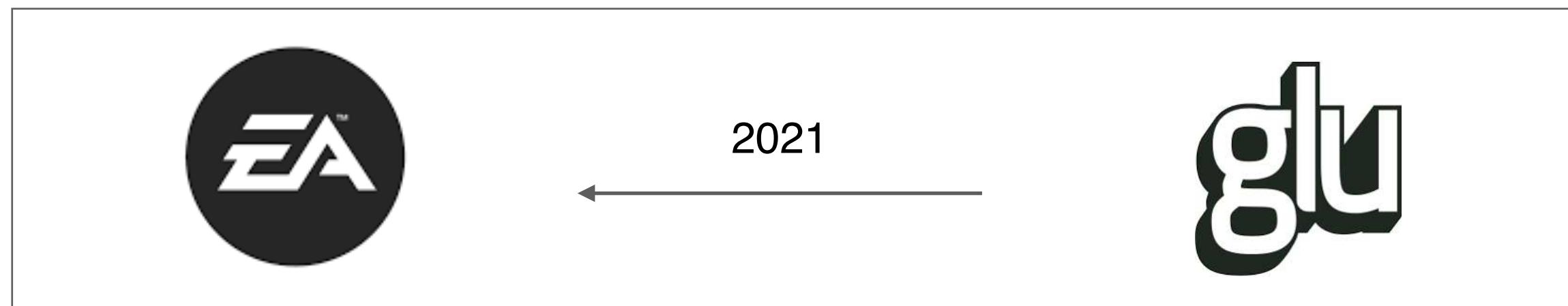
# Fifa Soccer Is the Most Popular IP Game

Revenues and Downloads of Popular IP Games in Sports category

[View in Store Intelligence](#)


# Acquisitions in Sports Category to Expand Portfolio

*M&A activity among top publishers in Sports Category*



Some of the top M&A deals in the Sports Category include the following acquisitions:

EA acquired GluMobile, developer of games such as *MLB Tap Sports Baseball* for \$2.1B in enterprise value

Recently, Miniclip purchased *Online Soccer Manager* developer Gamebasics (a Dutch Studio)

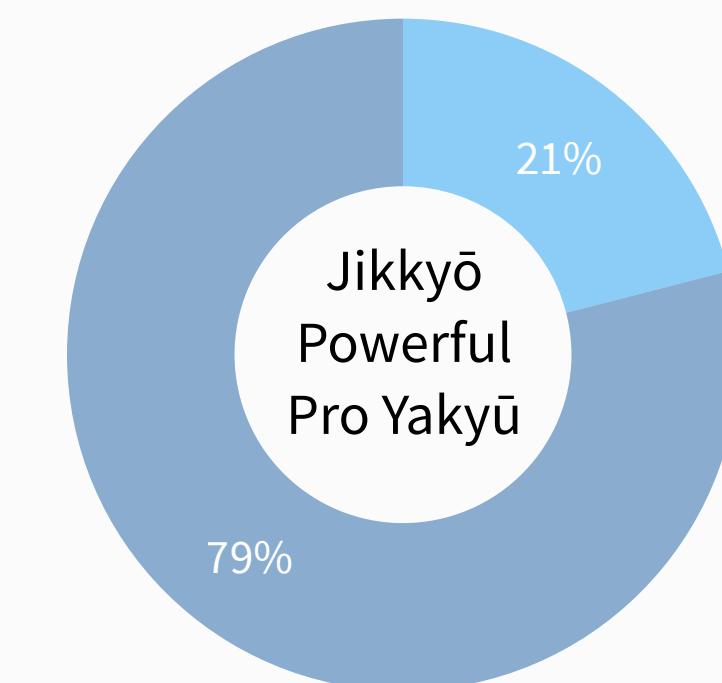
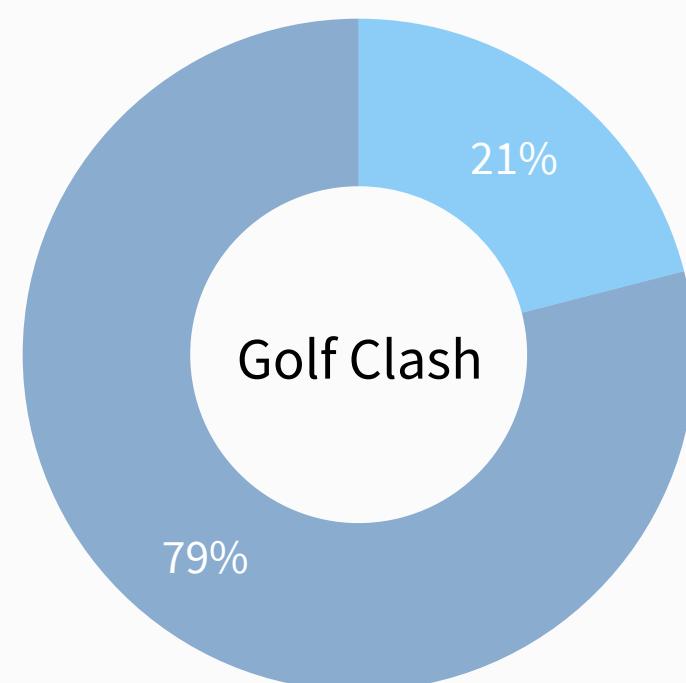
Miniclip had previously acquired Masomo in 2019, the game studio that developed *Head Ball* and *Head Ball 2*

TT Games, part of Warner Bros., acquired UK based Playdemic (developer of *Golf Clash*) in 2017

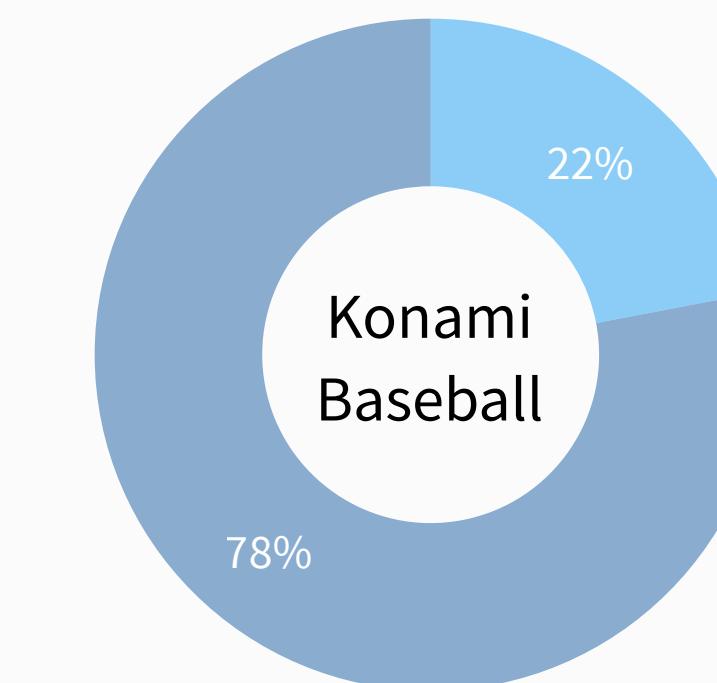
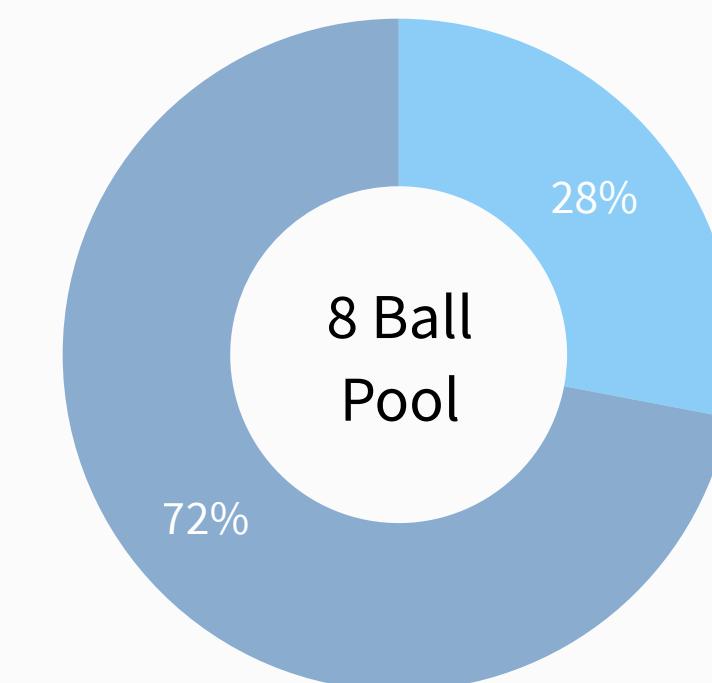
# Most Sports Games Have High Male User Base

Average demographic data of Top Sports Games by sub-genres on App Store

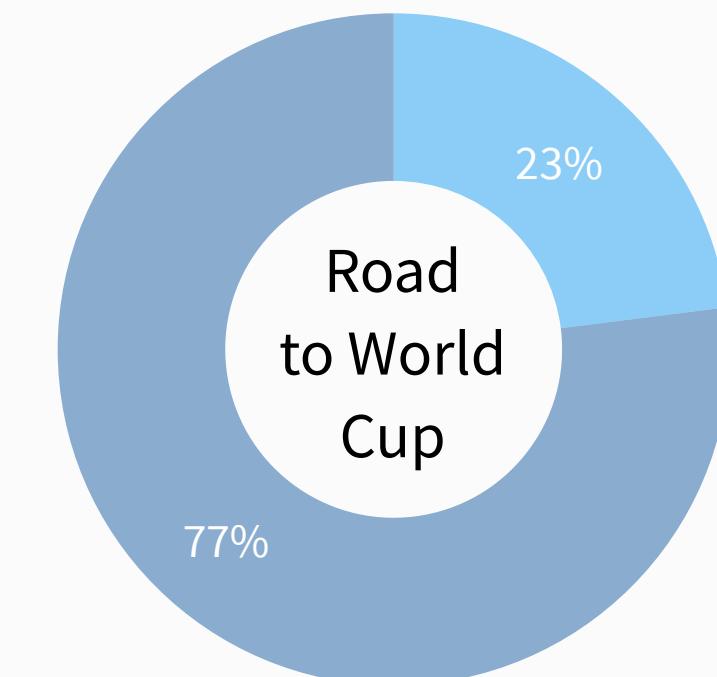
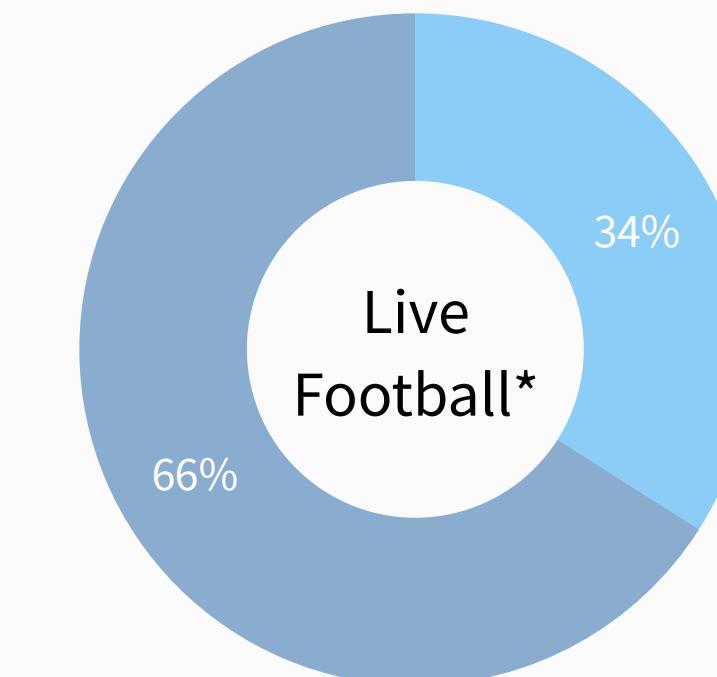
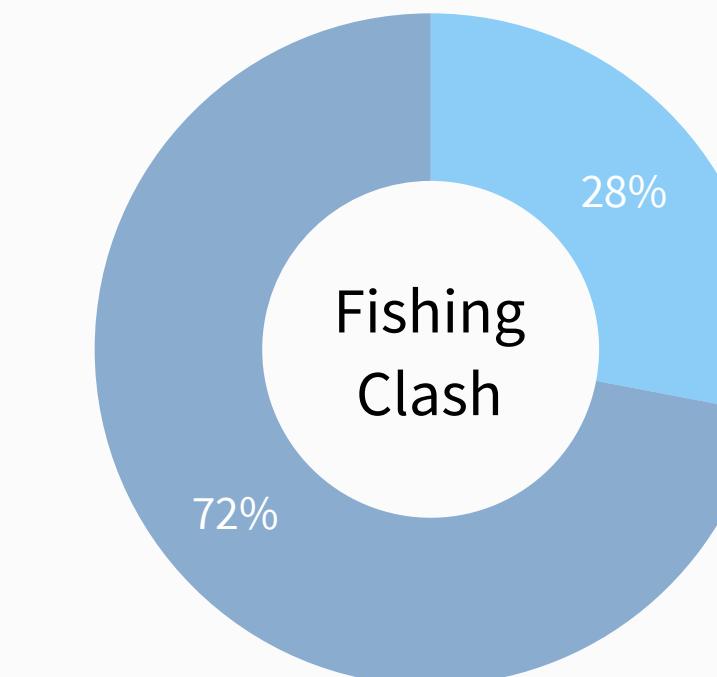
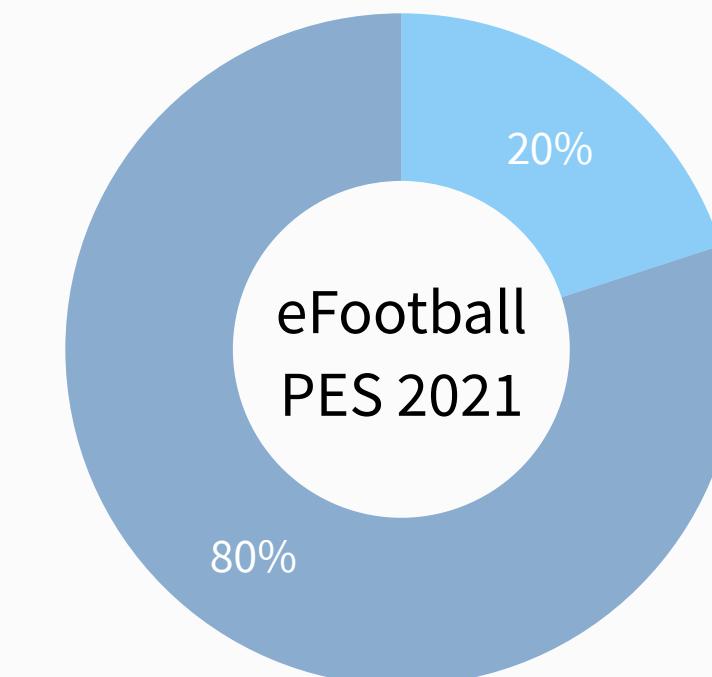
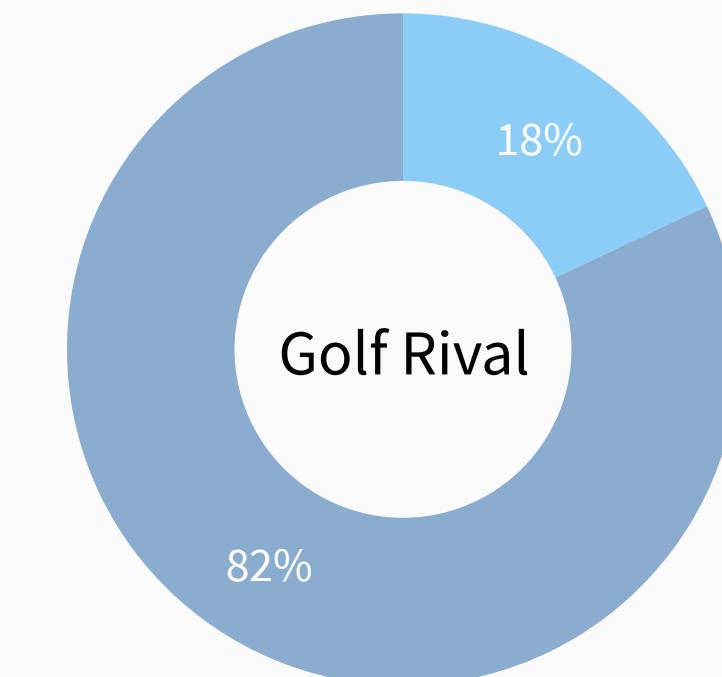
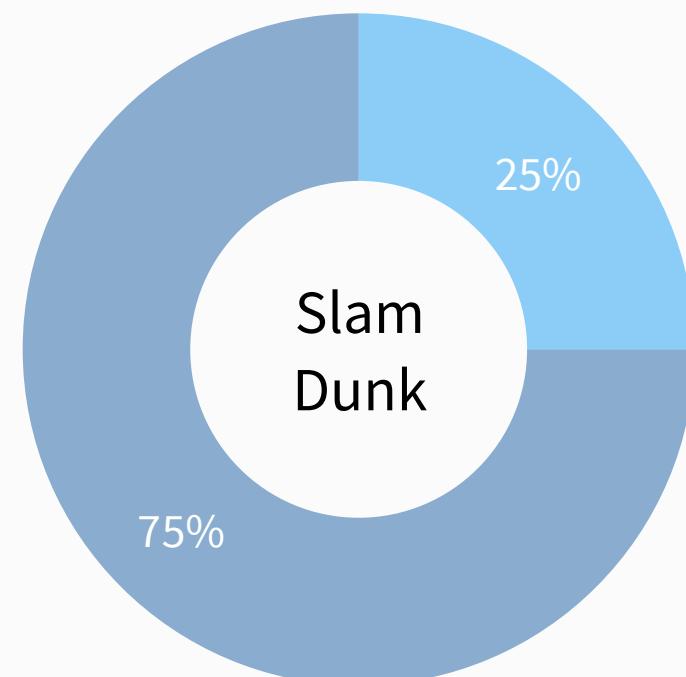
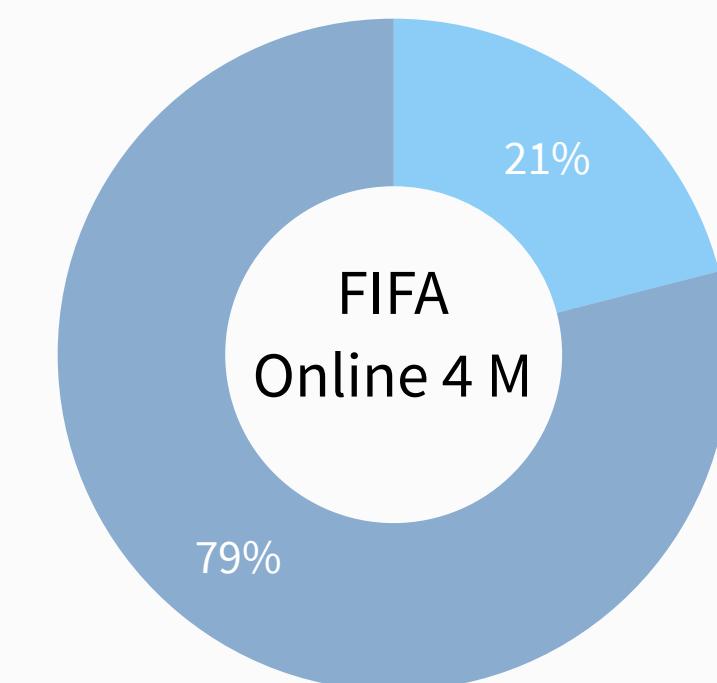
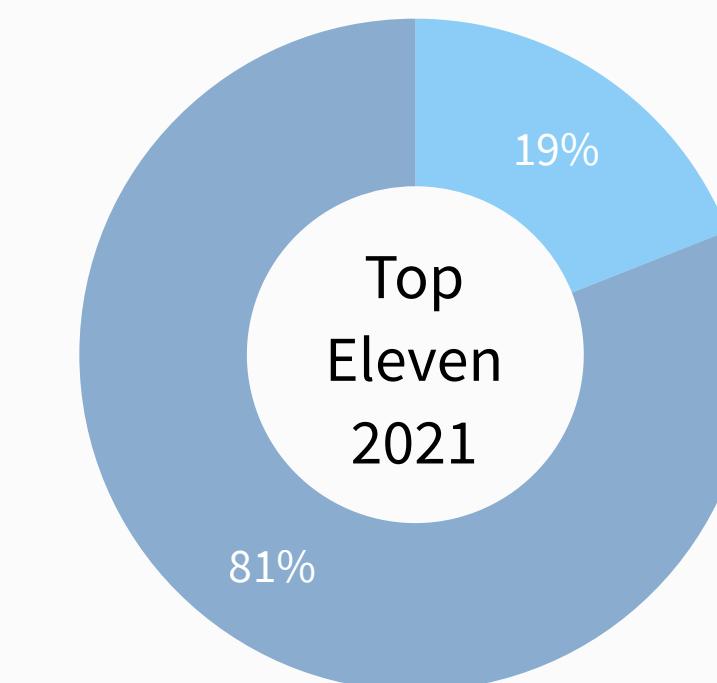
**Arcade Sports**



**Realistic Sports**



**Sports Manager**



Male

Female

\*Below average data fidelity

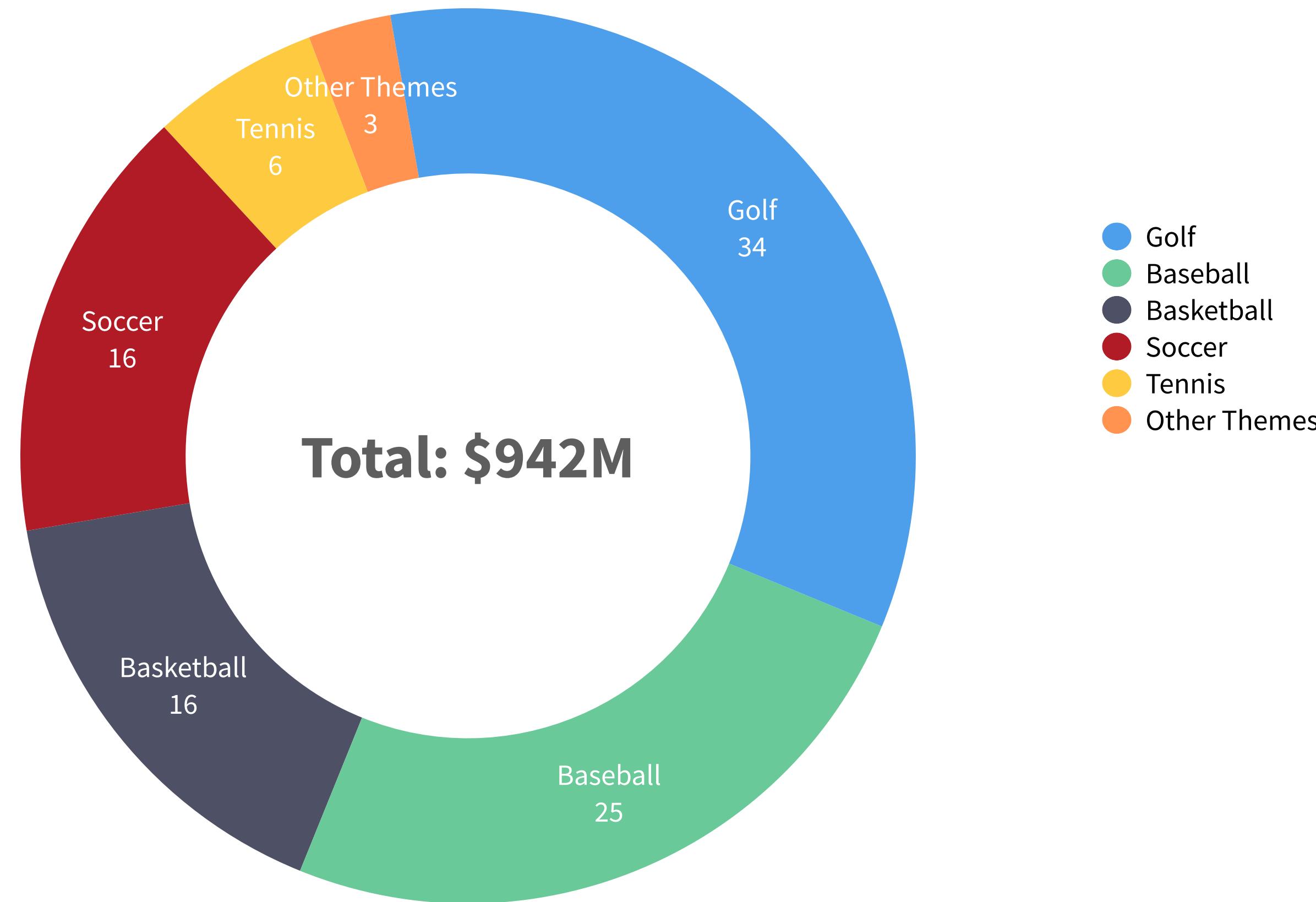
# A Closer Look at Arcade Sports



# Top 3 Sports in Arcade Are Golf, Baseball & Basketball

*Sport breakdown of top Arcade Sports games, by Revenue, last 18 months*

[View in Store Intelligence](#)



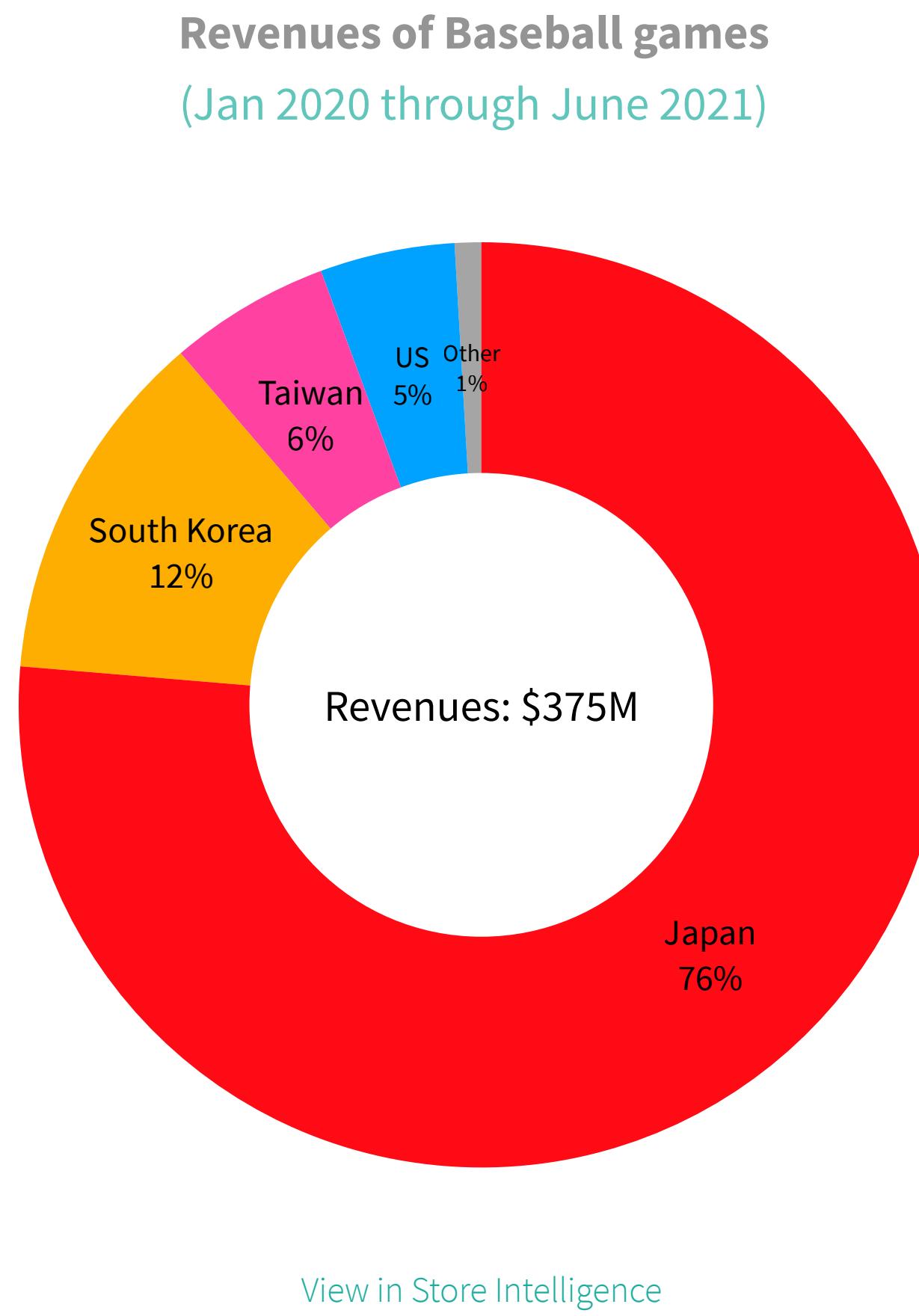
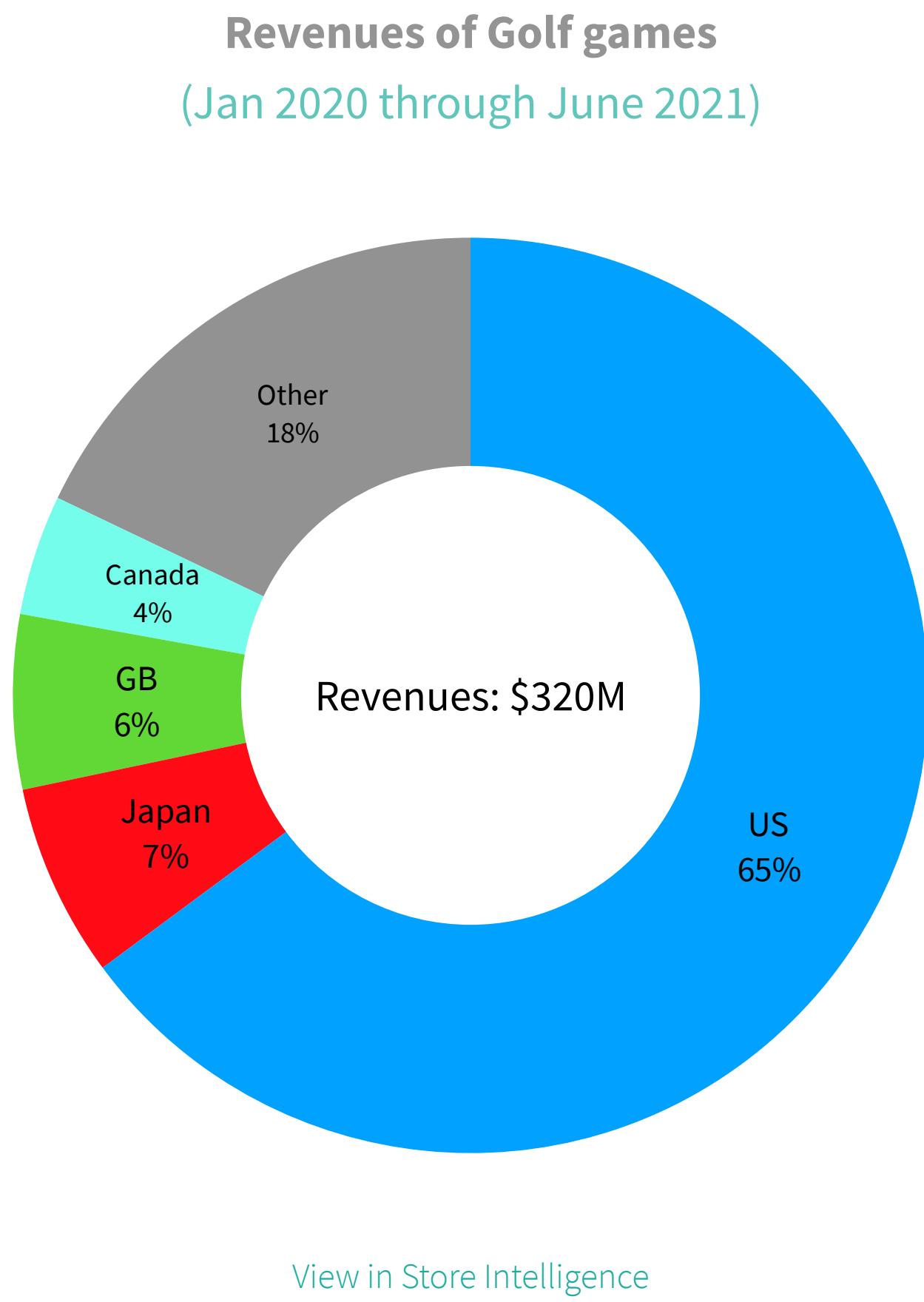
**More Basketball, Fishing and Alternative games are being released:** In the last 12 months, 33 new Arcade Sports titles have been released. Of these 33 new entrants, 6 titles are Basketball games, 5 are Alternative games and 4 are Fishing games. Only 2 Soccer and Golf games each have been released during this time period

Arcade Sports sub-genre has limited games based on sports such as Tennis, Archery and Fighting

**Most Arcade Sports games have 2D Cartoon art style:** 60 games have 2D Cartoon style and 41 games have 3D Cartoon art style

# Japan Driving Success of Baseball Titles

*Country Breakdown for top 2 Arcade Sports themes (Golf and Baseball) by revenues*



US dominates in revenues for Sports such as Golf, Fishing and Alternative sports

On the other hand, Asian countries are top revenue markets for Baseball, Soccer, and Basketball. Japan dominates in total revenues for Soccer games, while China, Taiwan, and Hong Kong accounting for over 75% of revenue for Basketball titles

The top 3 revenue generating Golf games during this period with the highest revenue share are:

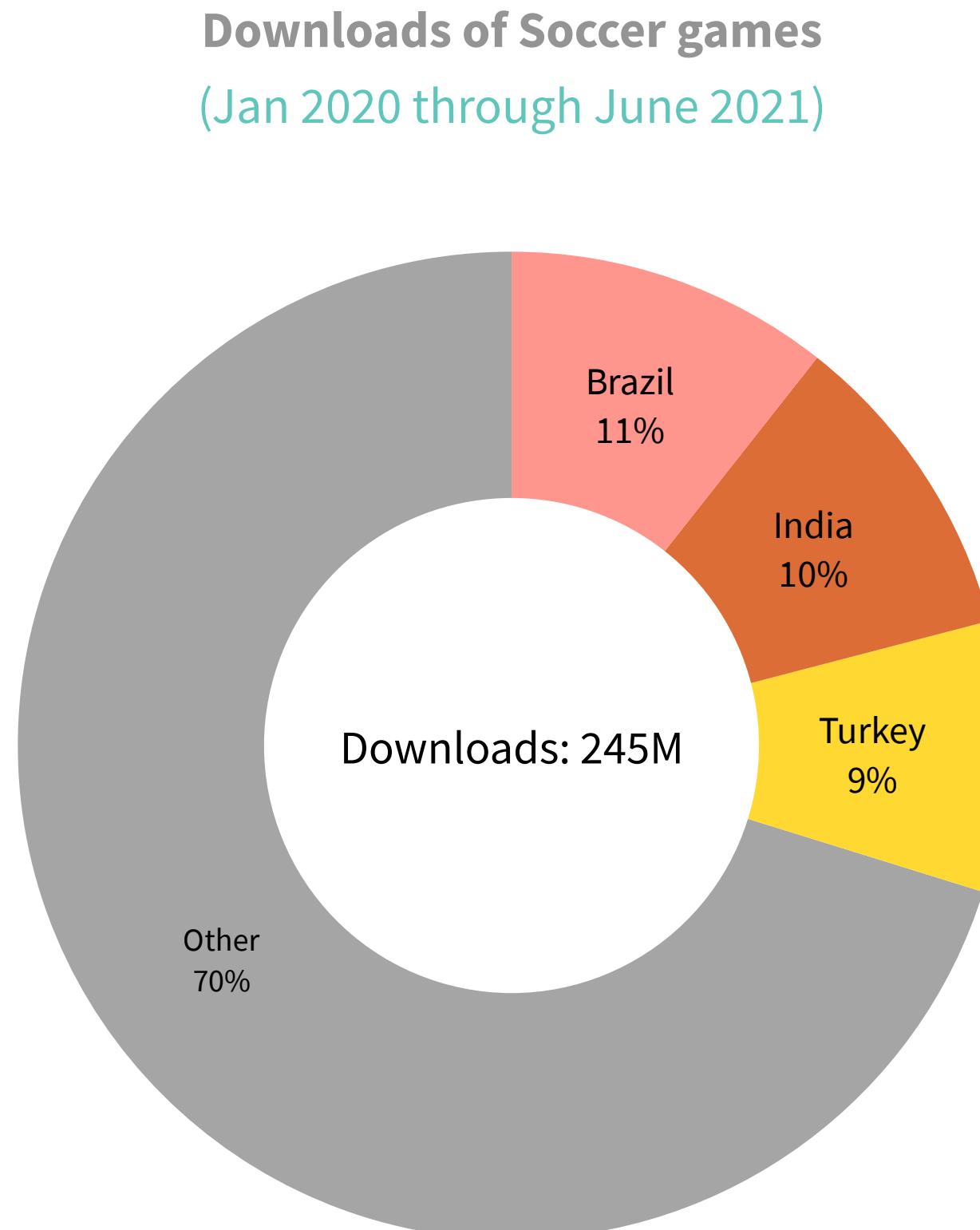
- **Golf Clash** (62%)
- **Golf Rival** (24%)
- **Ultimate Golf** (4%)

The top 3 revenue generating Baseball games with the highest revenue share are:

- **Jikkyō Powerful Pro Yakyū** (71%)
- **Crazy 2021** (9%)
- **Crazy Pro** (5%)

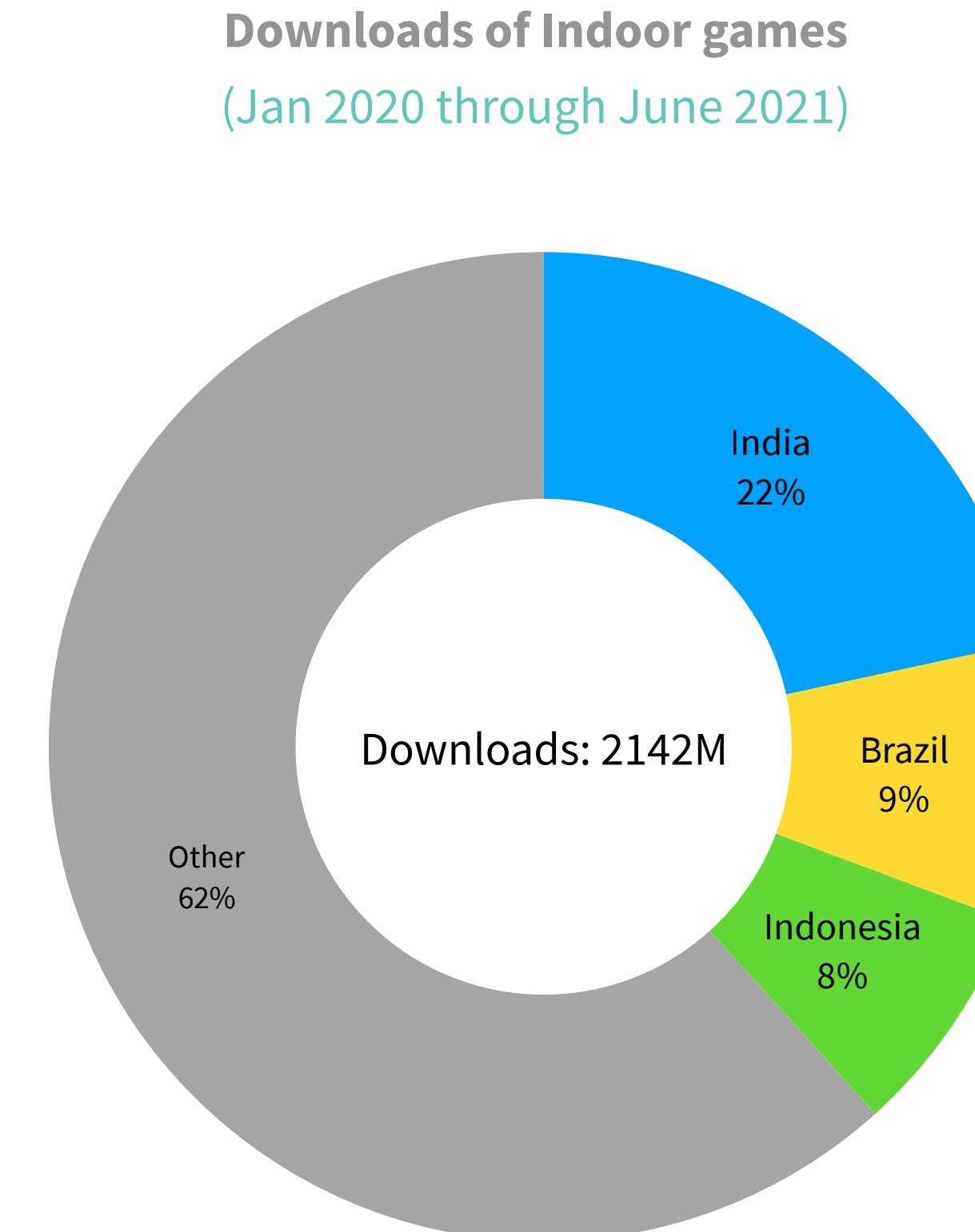
# Brazil Leads the Way in Downloads for Soccer Titles

*Country Breakdown for top 2 Arcade Sports themes (Soccer and Indoor) by downloads*



[View in Store Intelligence](#)

Arcade Sports



[View in Store Intelligence](#)

Soccer games are most downloaded in countries like Brazil, Turkey and India which have a large fanbase for the sport

The top 3 downloaded Soccer games during this period with the highest downloads share are:

- **Score! Hero** (23%)
- **Head Ball 2** (23%)
- **Football Strike** (21%)

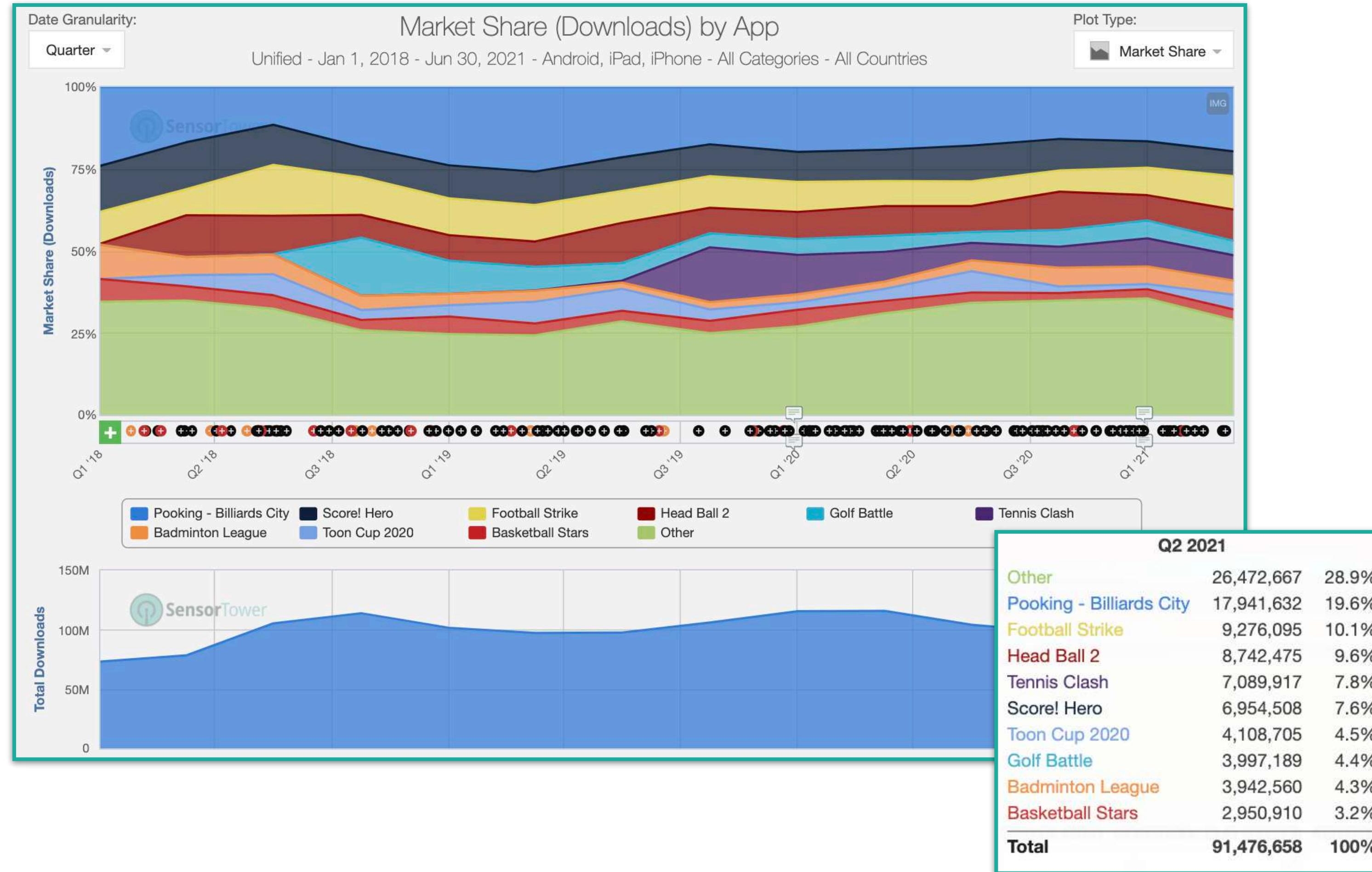
The top 3 downloaded Indoor games with the highest downloads share are:

- **Pooking - Billiards City** (78%)
- **Air Hockey Challenge** (12%)
- **Darts of Fury** (3%)

# Pooking - Billiards City Is Most Downloaded Title

Download share of top 25 Arcade Sports games between Jan 2018 and June 2021

[View in Store Intelligence](#)



Total downloads of Top 25 Arcade Sports games have been relatively stable since Jan 2018 and typically range between 30M-40M downloads per month

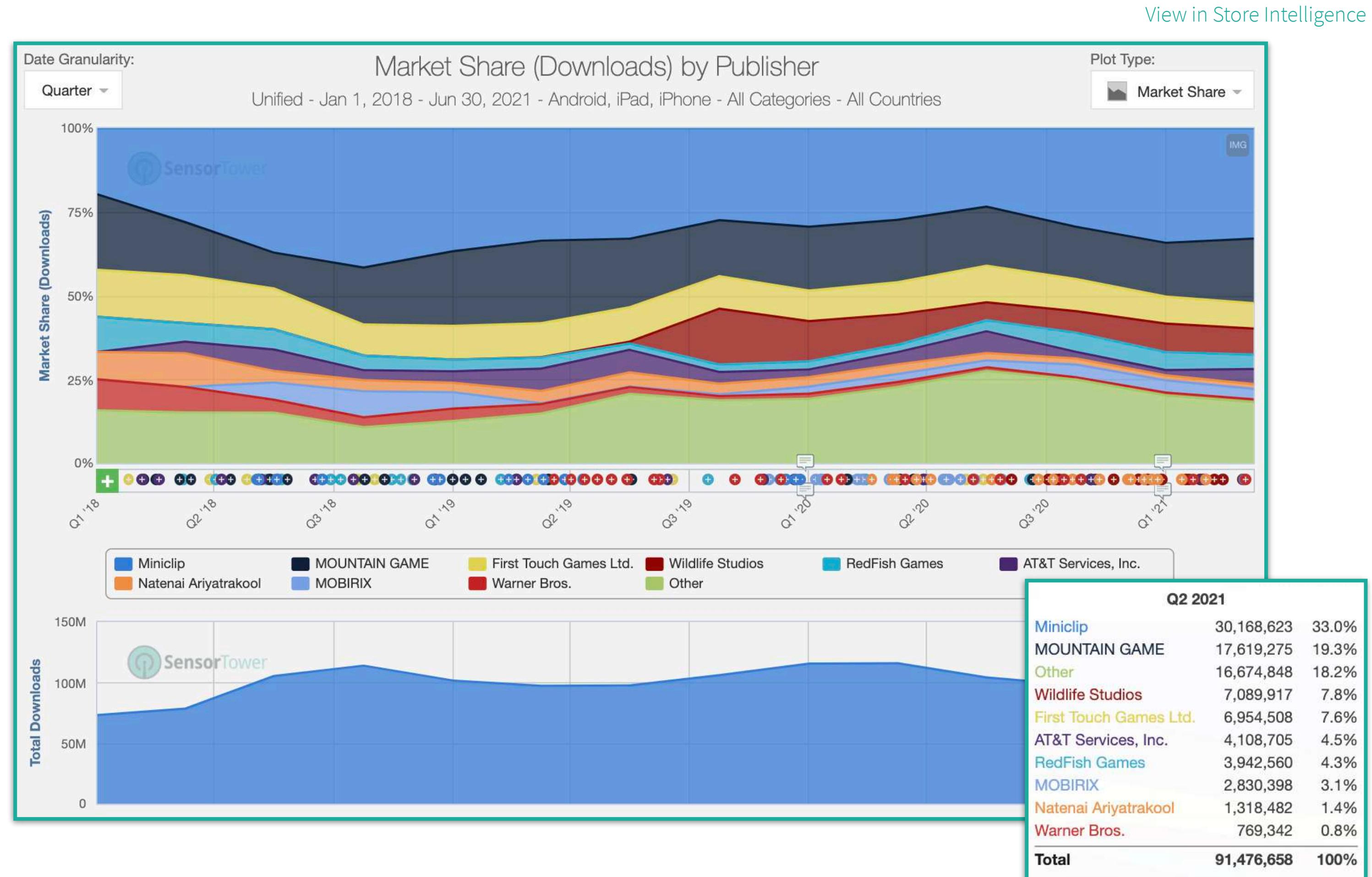
Since Jan 2018, the top 5 games are **Pooking - Billiards City** (19% downloads share), **Score! Hero** (10%), **Football Strike - Multiplayer Soccer** (10%), **Head Ball 2** (9%), and **Golf Battle** (6%)

**Pooking - Billiards City** has performed the best during the period and has maintained its top rank in downloads share through Q2 2021 with 20%

Android devices accounted for 87% of total downloads (iOS 13%). By country, India is the No.1 market for Arcade Sports games with 17%, followed by Brazil (10%) and US (8%)

# Miniclip Leads Arcade Sports in Download Share

Publisher downloads for top 25 Arcade Sports games between Jan 2018 and June 2021



The market for Arcade Sports games is concentrated at the publisher level, with the top 3 publishers (Miniclip, MOUNTAIN GAME, and First Touch Games) capturing 60% of total downloads during the period shown

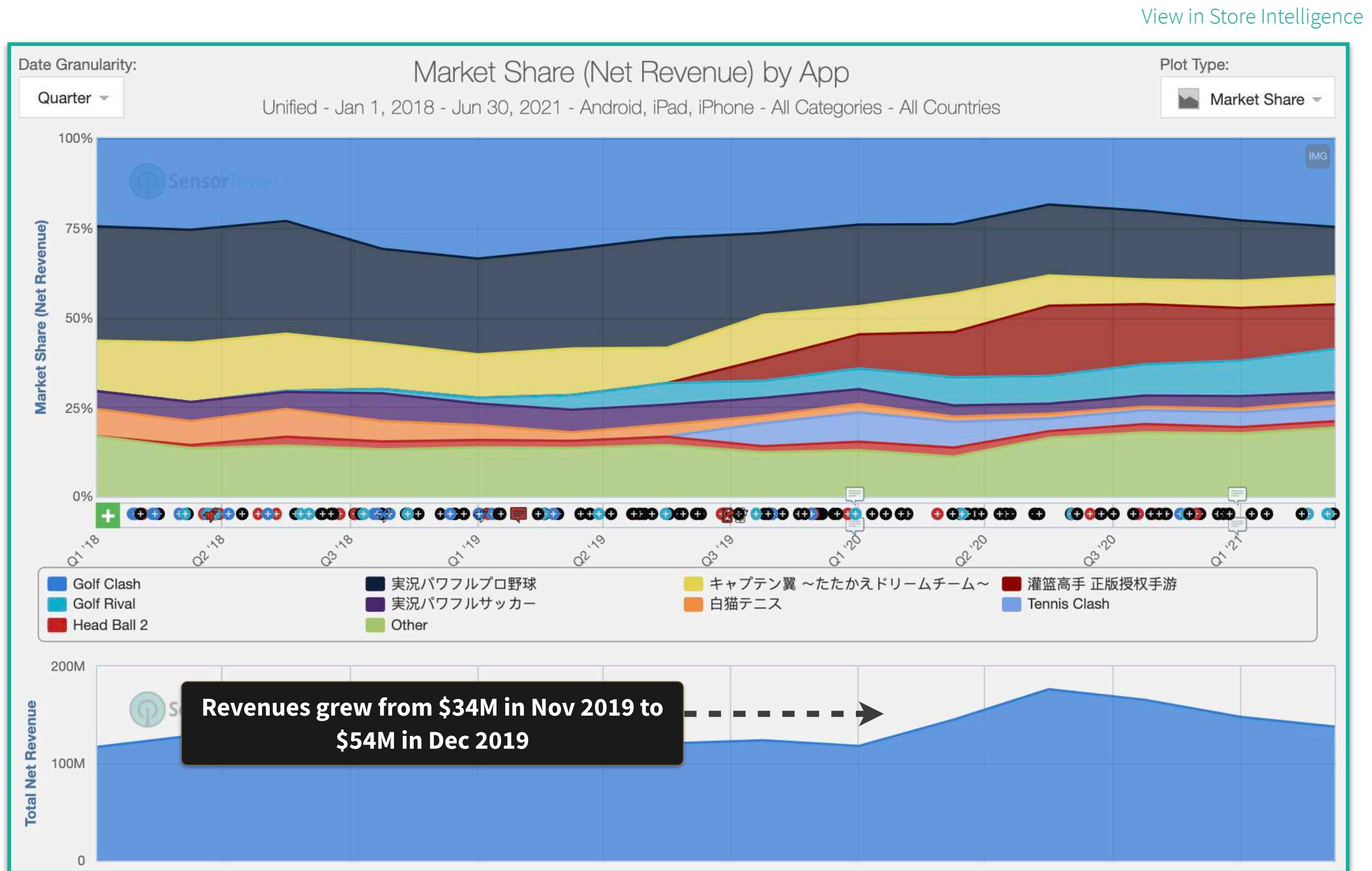
Among these 3 publishers, Miniclip (12 Arcade Sports titles) is the market leader with 32% downloads share from Jan 2018 to June 2021

While Miniclip is the clear market leader with multiple titles in this sub-genre, MOUNTAIN GAME and First Touch Games have captured significant share with only one title each in Arcade Sports (*Pooking - Billiards City* and *Score! Hero*)

Wildlife Studios and RedFish Games are on the rise and have picked up more market share in 1H 2021

# Golf Clash and Japanese Titles Are Top Performers

Revenue share of top 25 Arcade Sports games between Jan 2018 and Mar 2021



Total revenues of Top 25 Arcade Sports games were stable until 2019. Revenues grew from \$34M in Nov 2019 to \$54M in Dec 2019. The pandemic also led to a large increase in revenues in 2020 and revenues peaked at \$67M in Dec 2020. 1H 2021 has seen a decline in revenues

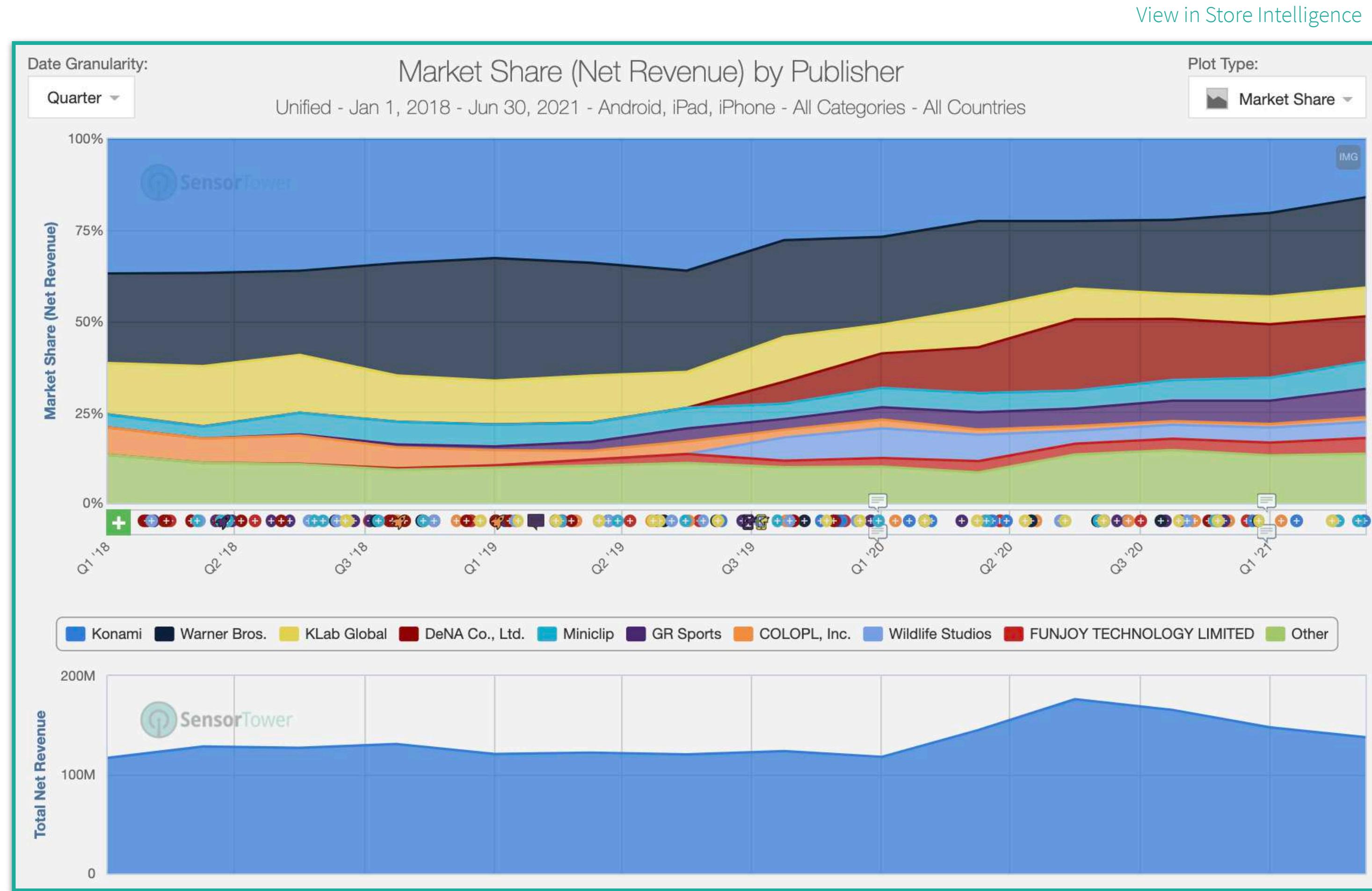
Since Jan 2018, the top 5 revenue earners are **Golf Clash** (25% revenue share), **Jikkyō Powerful Pro Yakyū** (24%), **Captain Tsubasa: Dream Team** (11%), **Slam Dunk** (7%), and **Golf Rival** (5%)

**Golf Clash** and **Jikkyō Powerful Pro Yakyū** dominate in this sub-genre, capturing nearly 50% of Top 25 revenues. Japanese IP games like **Captain Tsubasa** and **Slam Dunk** are also among top titles

iOS devices account for 59% of total revenues. Japan is the No.1 market with 42% revenue, followed by US (26%) and China (4%)

# Konami and Warner Bros. Dominate the Market

Publisher revenues for top 25 Arcade Sports games between Jan 2018 and June 2021



The top 5 Arcade Sports publishers (Konami, Warner Bros., KLab Global, DeNA Co. and Miniclip) captured 77% of total revenue in the period

Among these 5, Konami and Warner Bros. are the clear market leaders with 28% and 25% revenue share respectively from Jan 2018 to June 2021

Aside from Miniclip, which has multiple titles in Arcade Sports, most other publishers have only one or two Arcade Sports games in their portfolio

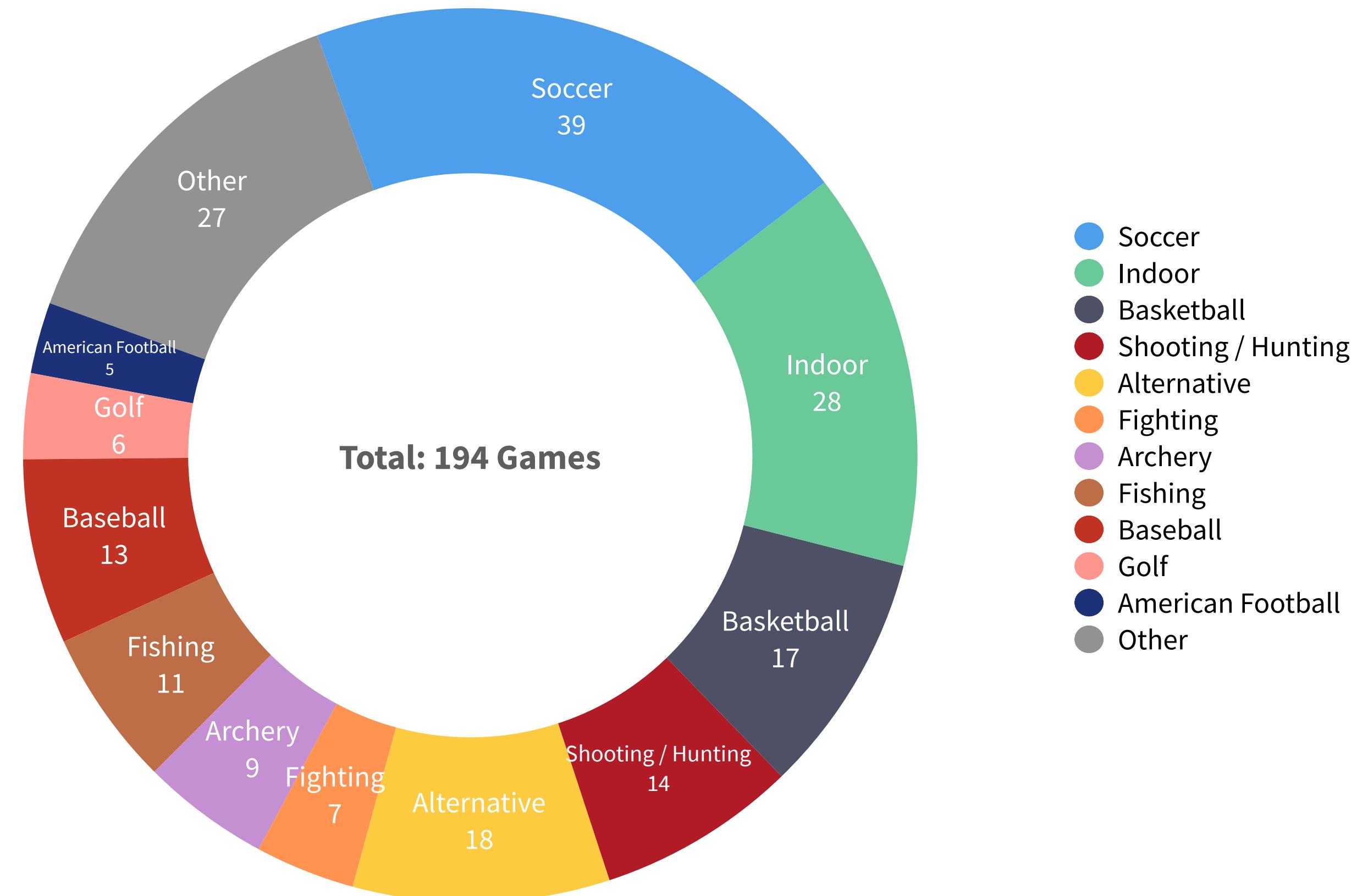
DeNA Co. is on the rise in the past year. DeNA Co. entered the market in Dec 2019 with its *Slam Dunk* title and has picked up significant market share in 2020 and 1H 2021, trailing only Konami and Warner Bros in the most recent period

# A Closer Look at Realistic Sports



# Top Realistic Sports Are Soccer and Indoor Sports

*Breakdown of top Realistic Sports games by sport*



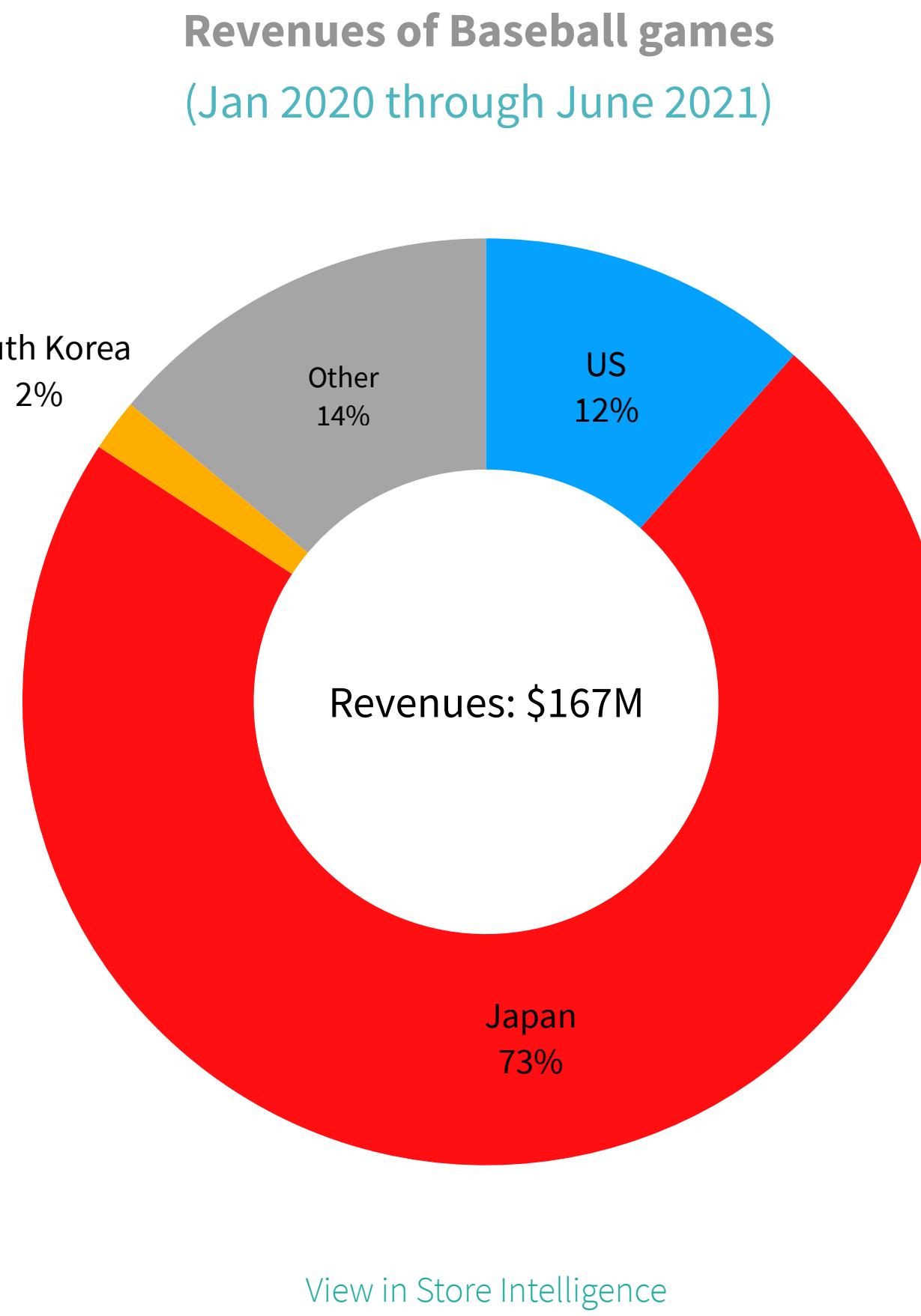
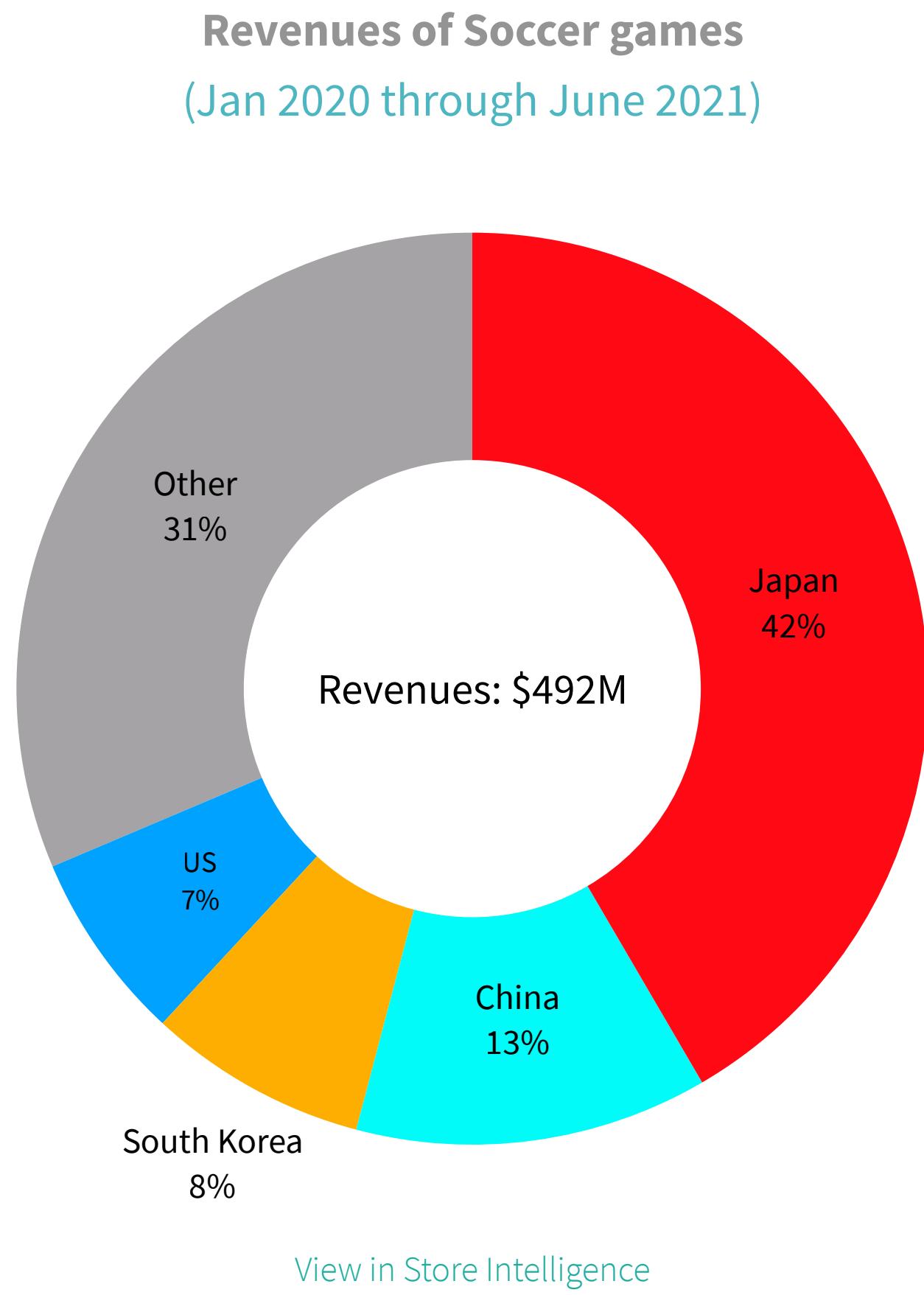
Besides Soccer and Indoor titles, Shooting/Hunting and Baseball games are also being released: From Jan 2020 to June 2021, 34 new Realistic Sports titles have been released. Of these 34 new entrants, 10 titles are soccer games, 5 are Shooting/Hunting games, 6 are Indoor games, 3 are Baseball games, and 2 are Basketball games. The rest fall under Alternative, Golf, and Fighting

Realistic Sports sub-genre has limited games based on sports such as Tennis and Freerunning

Most Realistic Sports games feature 3D Realistic art style: 171 games have 3D Realistic art style while 9 games have 2D Realistic art style

# Soccer Games Generate Most Revenues From Asia

*Country Breakdown for top 2 Realistic Sports themes by revenues (Soccer and Baseball)*



Asian countries are top revenue markets for the top Realistic Sports themes (Soccer and Baseball). Japan drives the vast majority of revenues across both categories

US dominates in revenues for Sports such as Indoor, Shooting/Hunting and Alternative sports, while China is the top market for Basketball titles.

The top 3 revenue generating Soccer games during this period are:

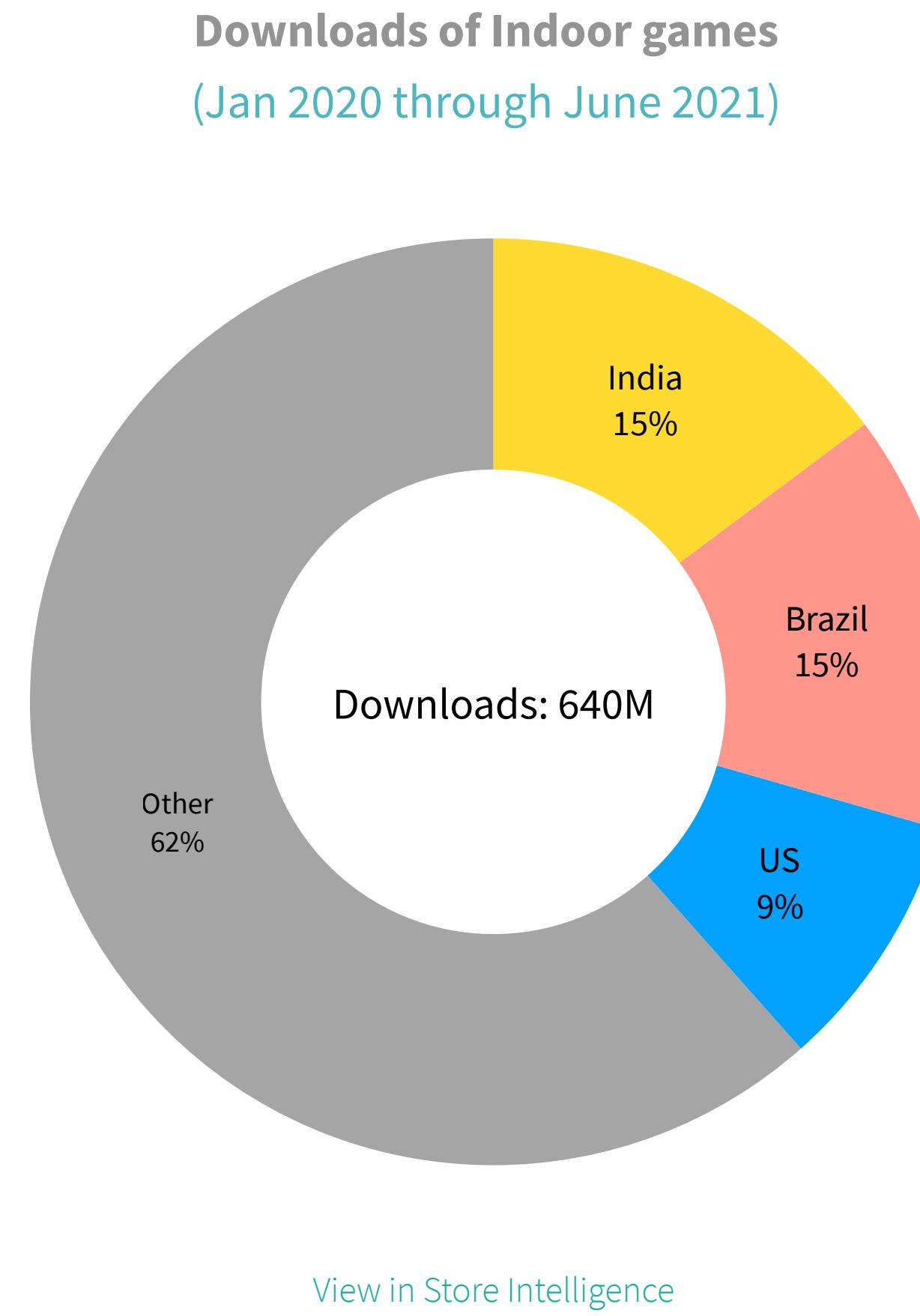
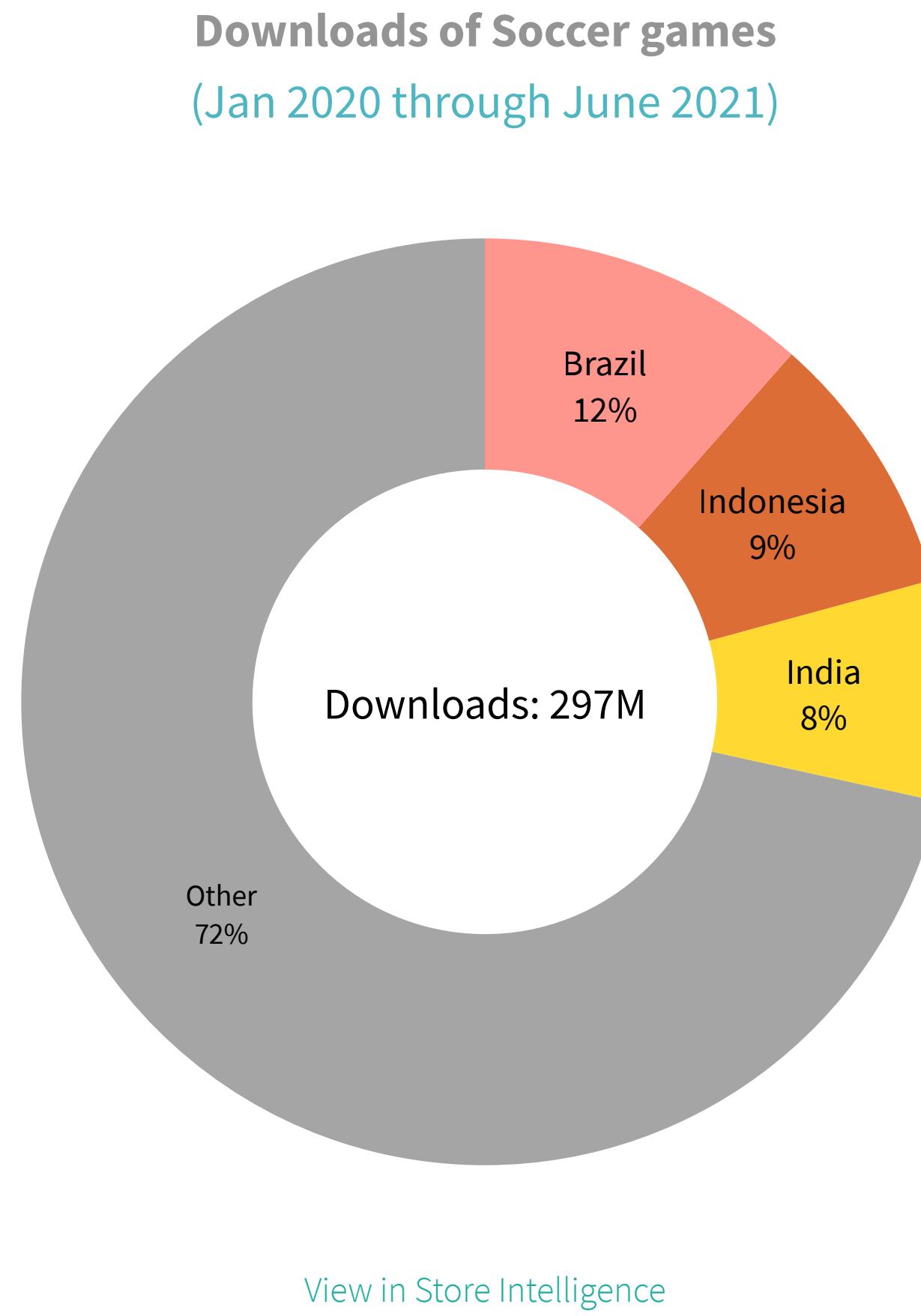
- *eFootball PES 2021* (47%)
- *FIFA Soccer* (28%)
- *PES Card Collection* (8%)

The top 3 revenue generating Baseball games are:

- *Professional Baseball Spirits* (80%)
- *MLB Tap Sports Baseball 2020* (8%)
- *MLB 9 Innings 21* (7%)

# Brazil and India Most Popular for Realistic Sports

*Country Breakdown for top 2 Realistic Sports themes by downloads (Soccer and Indoor)*



Soccer and Indoor games are most downloaded in countries like Brazil and India which have a large fanbase for sports like Soccer, Pool and Billiards.

The top 3 downloaded Soccer games during this period with the highest downloads share are:

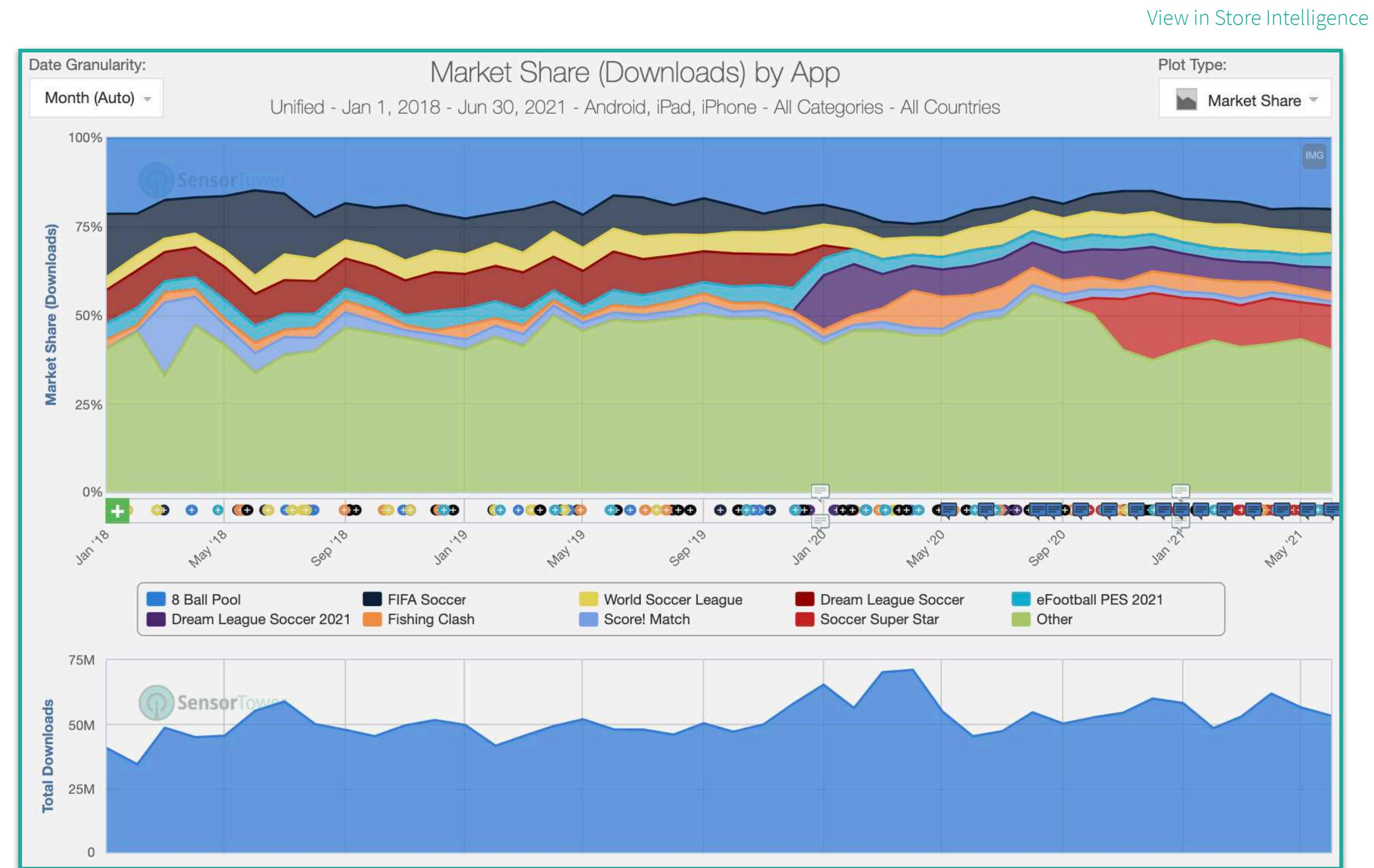
- *Dream League Soccer 2021* (28%)
- *World Soccer League* (21%)
- *Fifa Soccer* (19%)

The top 3 downloaded Indoor games with the highest downloads share are:

- *8 Ball Pool* (72%)
- *Bowling Crew* (7%)
- *Table Tennis Touch* (4%)

# Overall Stable Download Trend for Realistic Sports

*Download share of top 100 Realistic Sports games between Jan 2018 and June 2021*



Total downloads of Top 100 Realistic Sports games have been relatively stable since Mar 2018 and typically range between 50M-60M downloads per month. Downloads increased between Dec 2019 to May 2020 peaking at 71M in Apr 2020.

Since Jan 2018, the top 5 games are **8 Ball Pool** (19% downloads share), **FIFA Soccer** (9%), **World Soccer League** (6%), **Dream League Soccer** (5%) and **eFootball PES 2021** (4%).

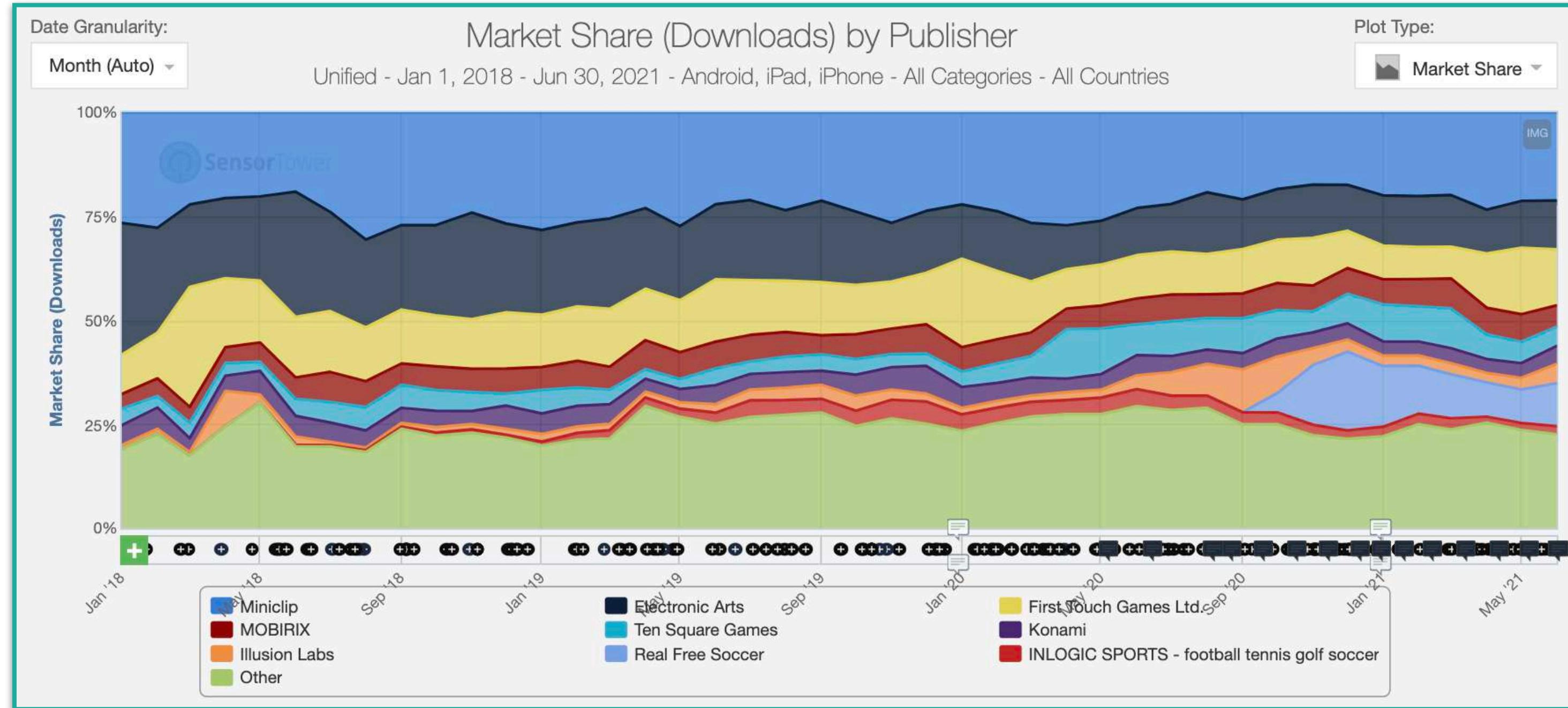
**8 Ball Pool** is the top performing title and has maintained its top rank in downloads share during Q1 2021 with 18-20% per month.

Android devices account for 78% of total downloads. By country, India is the No.1 market for Realistic Sports games with 13%, followed by US (11%) and Brazil (10%)

# Miniclip Leads Arcade Sports in Downloads

Publisher downloads for top 100 Realistic Sports games between Jan 2018 & June 2021

[View in Store Intelligence](#)



The market for Realistic Sports games is concentrated at the publisher level, as the top 5 publishers (Miniclip, Electronic Arts, First Touch Games, MOBIRIX and Ten Square Games) account for over 60% of total downloads

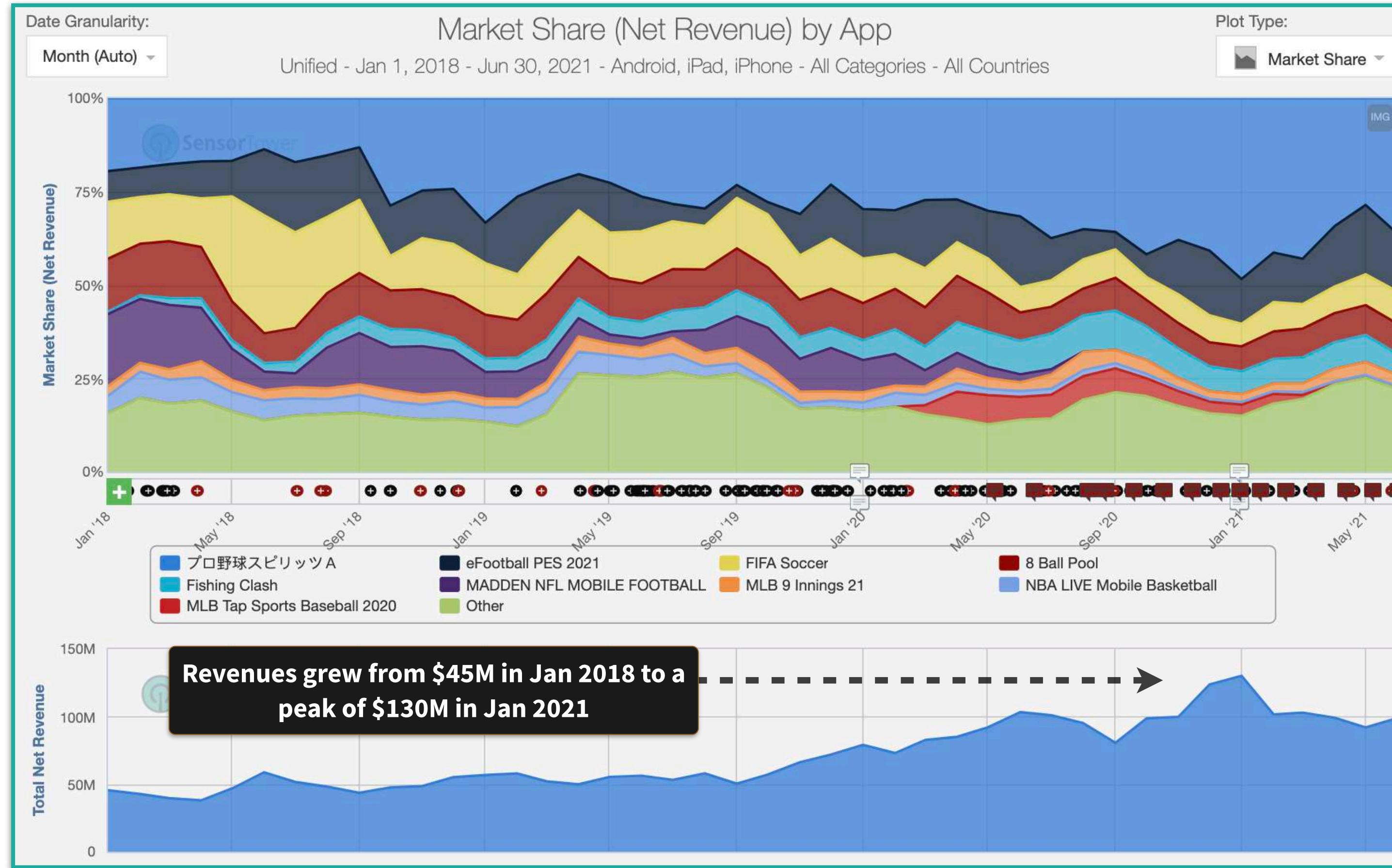
Miniclip is the market leader with 23% share from Jan 2018 to June 2021 and has Pool, Bowling, Table Tennis and Archery games in the Top 100

MOBIRIX's *World Soccer League* is popular in Indonesia, India, and Brazil, while Ten Square Games' *Fishing Clash* and *Hunting Clash* are most popular in US.

# Realistic Sports Shows Positive Revenue Growth

*Revenue share of top 100 Realistic Sports games between Jan 2018 and June 2021*

[View in Store Intelligence](#)



Total revenues of Top 100 Realistic Sports games have increased significantly in the last 3.5 years, growing from \$45M in Oct 2019 to \$99M in June 2021. Revenues peaked at \$130M in Jan 2021

Since Jan 2018, the top 5 revenue earners are **Professional Baseball Spirits A** (31% revenue share), **eFootball PES 2021** (13%), **FIFA Soccer** (11%), **8 Ball Pool** (9%), and **Fishing Clash** (6%).

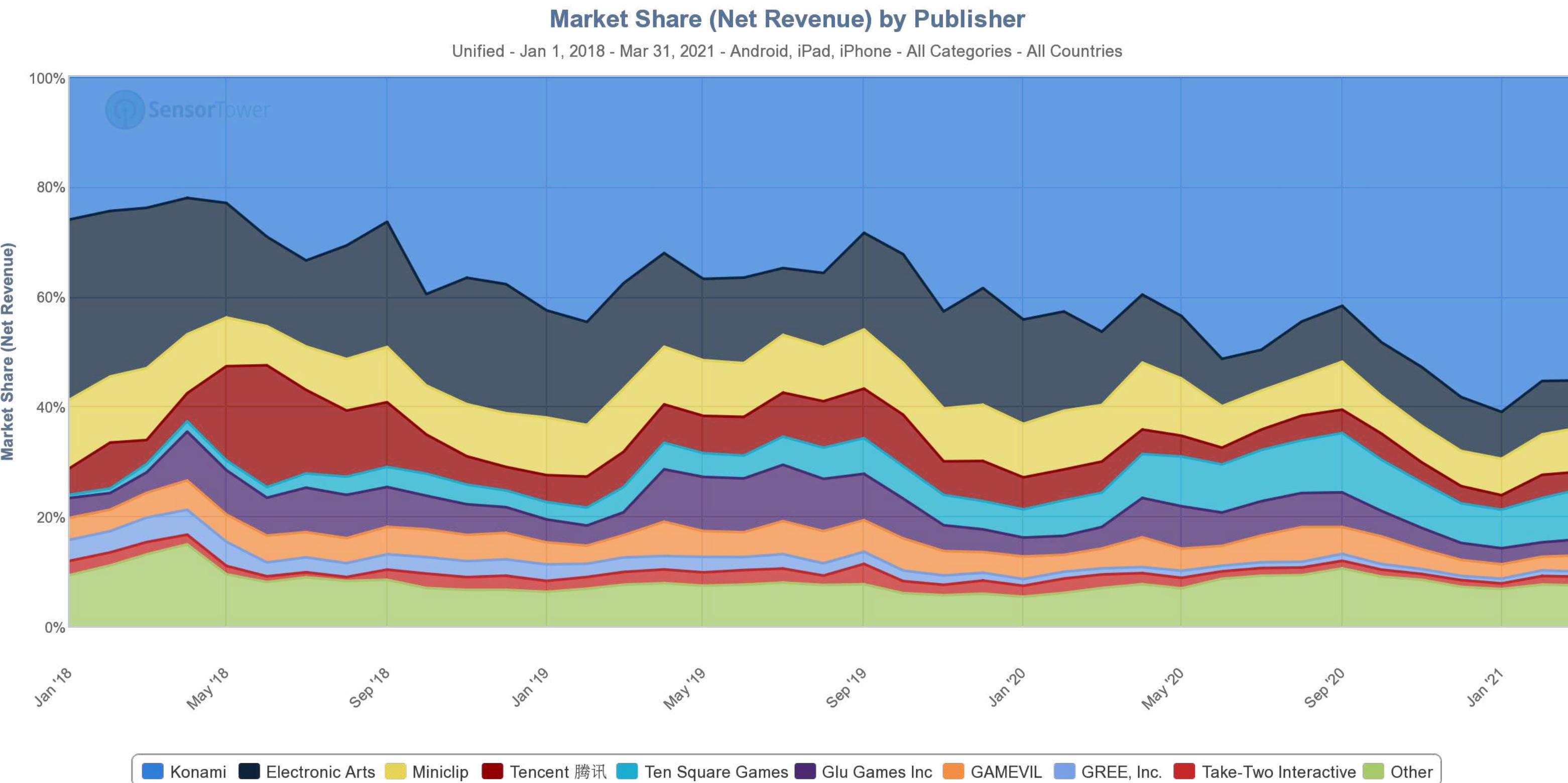
Konami titles **Professional Baseball Spirits A** and **eFootball PES 2021** continue to perform well in Q2 2021 with the highest market share.

iOS devices account for 62% of total revenues. Japan is the No.1 market with 41% revenue, followed by US (26%) and China (8%).

# Konami and Electronic Arts Are Top Publishers

Publisher revenues for top 100 Realistic Sports games between Jan 2018 and Mar 2021

[View in Store Intelligence](#)



The top 5 publishers (Konami, Electronic Arts, Miniclip, Tencent and Ten Square Games) in this subgenre take up 78% of total downloads share

Among these 5, Konami and Electronic Arts are the clear market leaders with 42% and 15% revenue share respectively from Jan 2018 to Mar 2021

Konami focuses on soccer (PES) and baseball titles. Electronic Arts' portfolio of realistic sports games includes titles from their FIFA, NBA, Madden NFL and UFC franchises

Konami's market share has been increasing in the last 6 months and it captured 55-60% share during Q1 2021

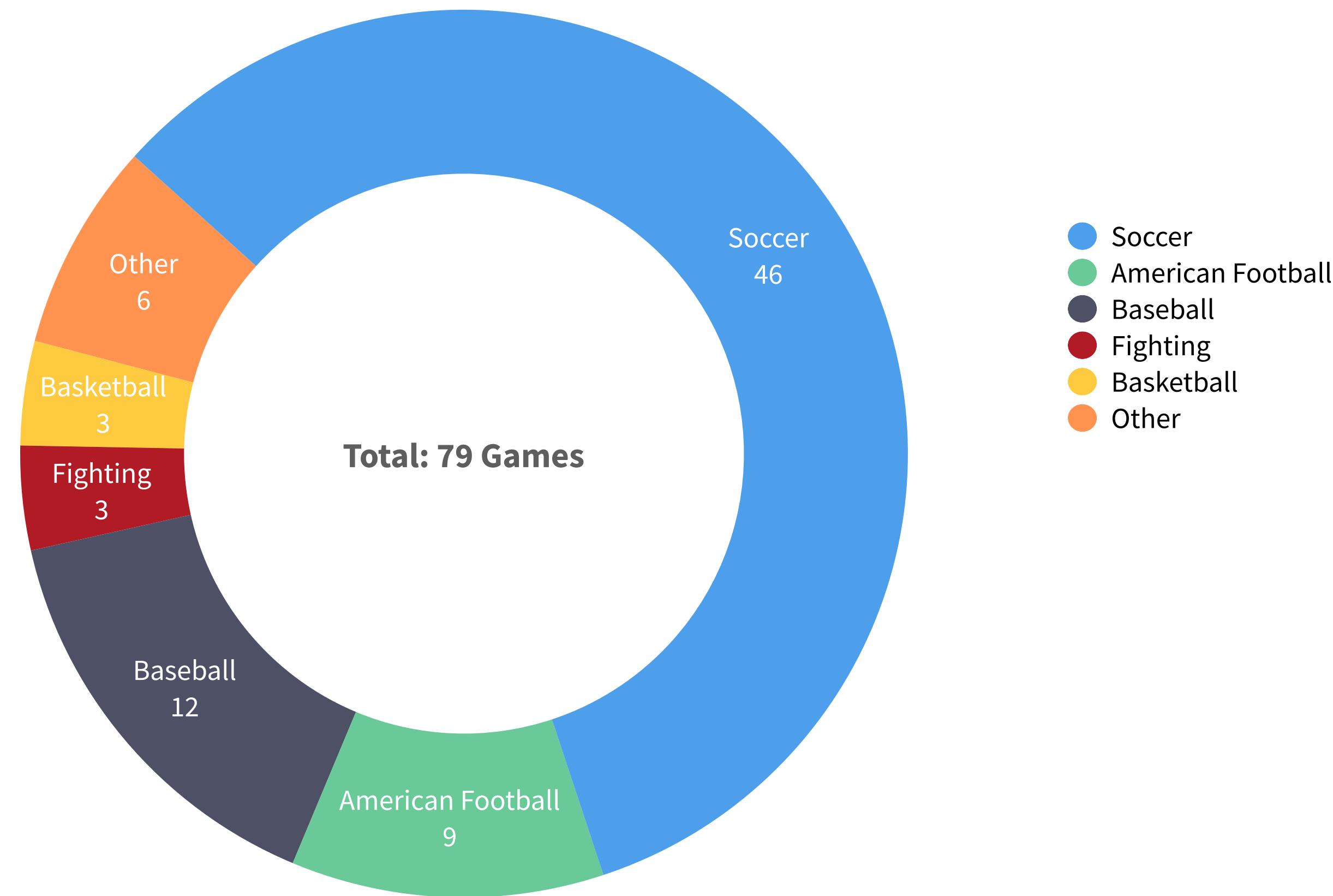
# A Closer Look at Sports Manager



# Soccer & American Football Titles in Sports Manager

*Breakdown of top Sports Manager games by sport*

[View in Store Intelligence](#)



Soccer and American Football games are most popular.

In the last 2 years, 23 new Sports Manager titles have been released. 12 of these new titles are Soccer games

The sub-genre has limited titles based on sports such as Basketball, Tennis and Fighting

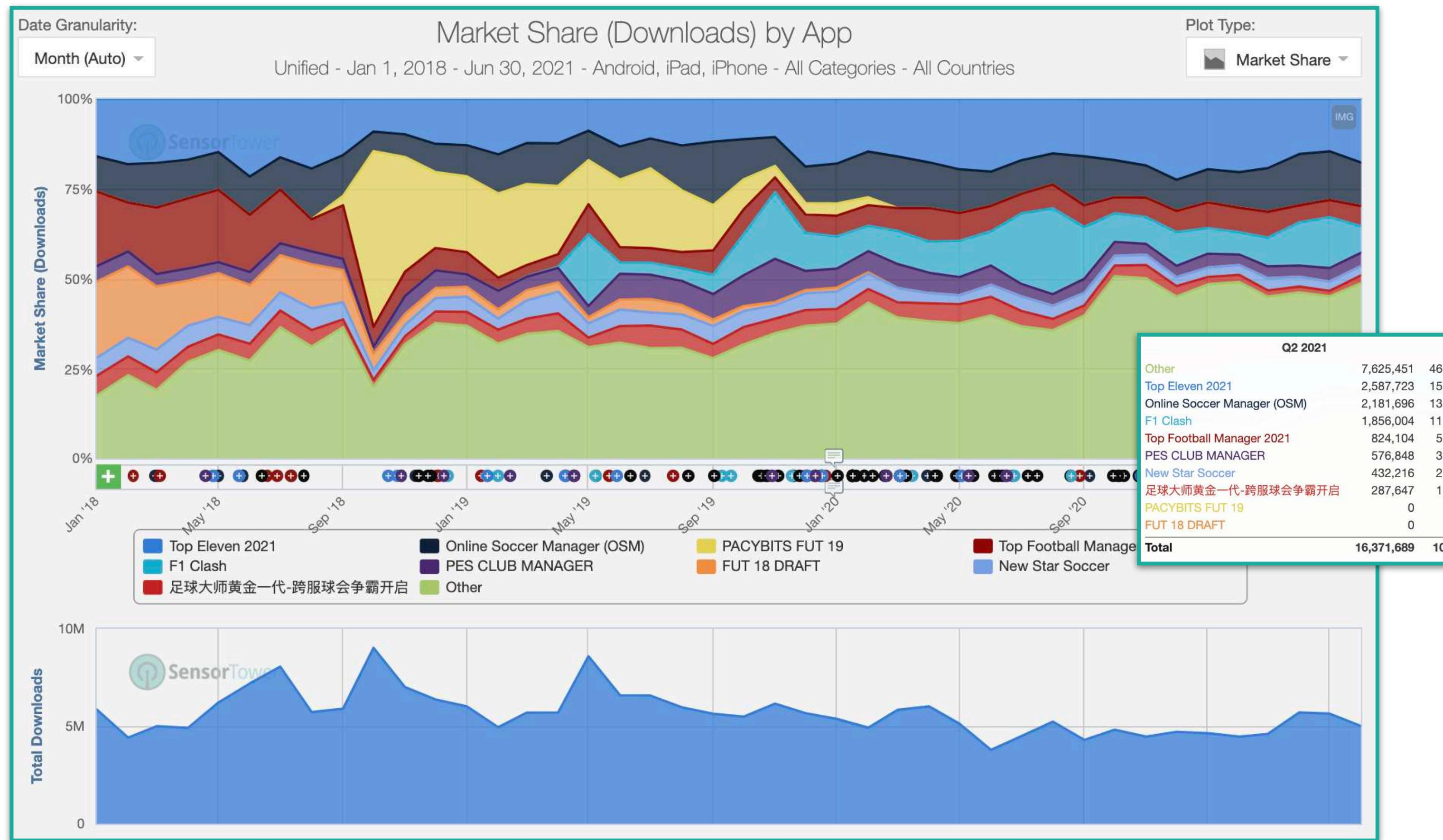
The 'Other' category on the right captures Cricket (2 games), Hockey (2), eSports (1), Tennis (1)

Most Sports Manager games have Realistic art style: 22 games have 2D Realistic style, 17 games have 3D Realistic art style and 15 games have Flat art style

# Declining Download Trend for Sports Manager Titles

Download share, Sports Manager games, Jan 2018 and June 2021

[View in Store Intelligence](#)



Sports Manager downloads have declined since Oct '18. Downloads have gradually declined from a peak of 8.8M in Oct '18 to 4.6M in June 2021

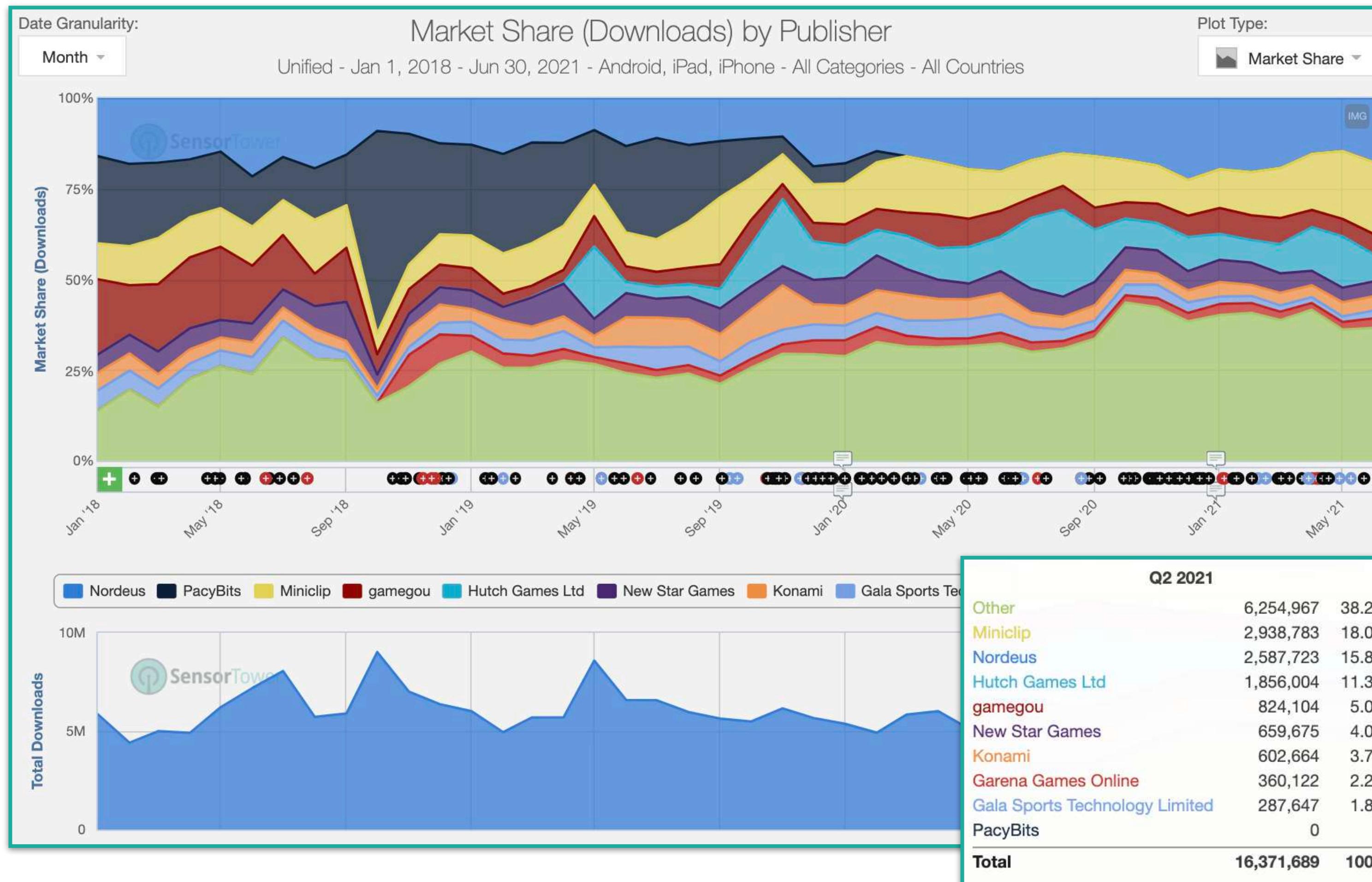
Since Jan 2018, the top 5 games are **Top Eleven 2021** (15%), **Online Soccer Manager - 20/21** (11%), **PACYBITS FUT 19** (8%), **Top Football Manager 2021** (8%) and **F1 Clash** (6%). **Top Eleven 2021** has the highest downloads share in Q2 2021

Android devices account for 75% of total downloads. By country, Brazil is the No.1 market for Sports Manager games with 9%, followed by Turkey (8%) and Indonesia (6%)

# Concentrated Market Among Top 5 Publishers

Publisher download share, Sports Manager games, Jan 2018 and June 2021

[View in Store Intelligence](#)



The market for Sports Manager games is concentrated among top publishers

The top 5 publishers (Nordeus, PacyBits, Miniclip, Gamegou and Hutch Games) in this sub-genre take up 54% of total downloads share

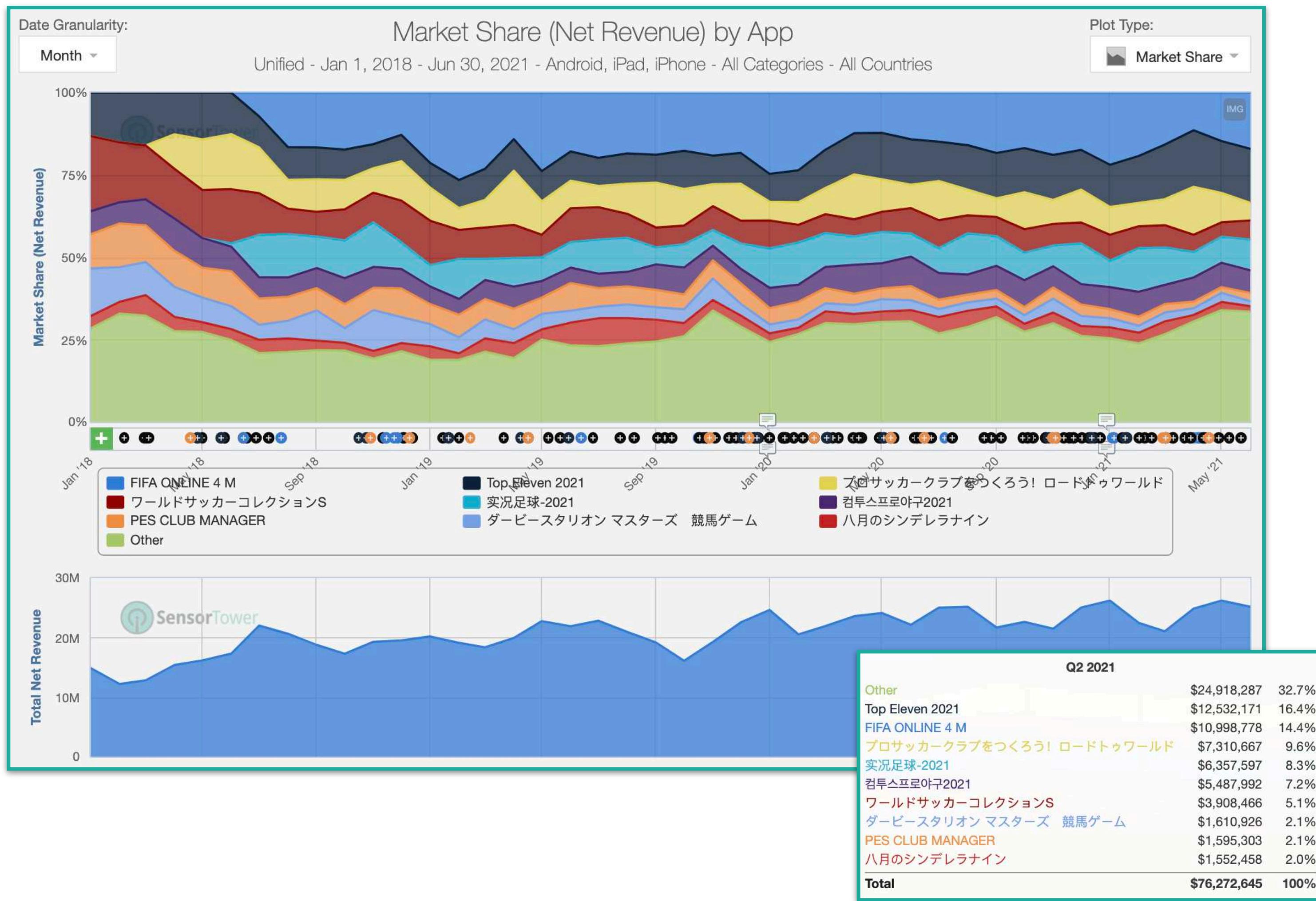
Miniclip & PacyBits each have 4 titles in Sports Manager sub-genre, while Nordeus, Gamegou, and Hutch Games each have 1 title (**Top Eleven 2021**, **Top Football Manager**, and **F1 Clash**, respectively)

In Q2 2021, Miniclip overtook Nordeus as the top publisher in the sub-genre, while Hutch Games' F1 Clash has led the pack in the past (e.g., Q4 2019 and Q3 2020)

# Increasing Revenue Trend for Sports Manager Titles

Revenue share, Sports Manager games, Jan 2018 and June 2021

[View in Store Intelligence](#)



Total revenues of Sports Manager games have steadily increased since 2018. Revenues peaked at \$76M in the most recent quarter (Q2 2021), up from \$40M in Q1 2018

Since Jan 2018, the top 5 revenue earners are all soccer titles: **FIFA Online 4 M** (16% revenue share), **Top Eleven 2021** (12%), **SEGA Pocket Club Manager** (9%), **PES Collection** (9%), and **eFootball PES 2021** (9%)

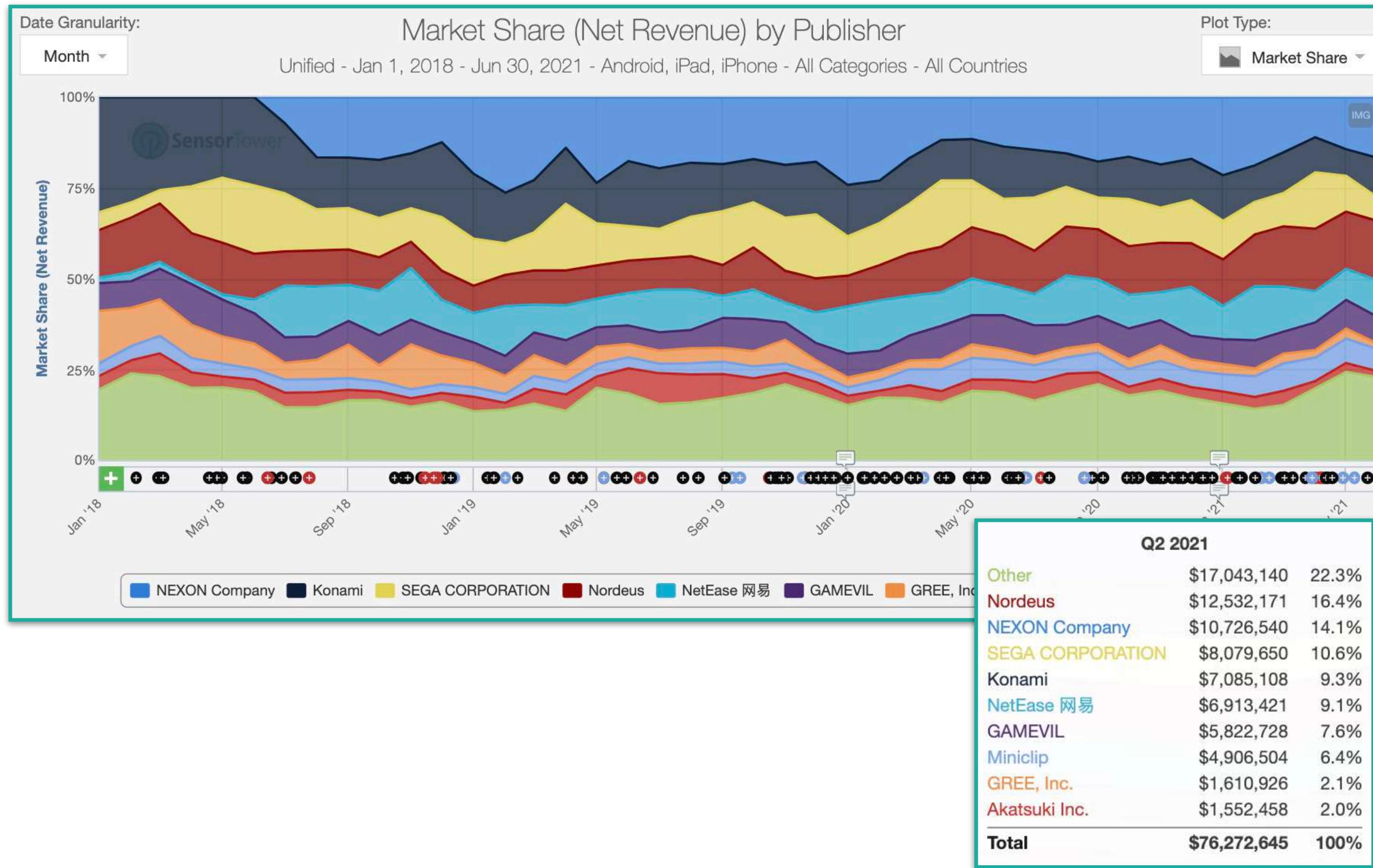
In Q2 2021, **Top Eleven 2021** overtook **FIFA Online 4 M** as the highest-grossing Sports Manager game

iOS devices account for 52% of total revenues. Japan is the No.1 market with 36% revenue share, followed by South Korea (23%) and China (13%)

# Top 4 Publishers Each Have Over 10% Revenue Share

Publisher revenues, Sports Manager games, Jan 2018 and June 2021

[View in Store Intelligence](#)



The top 5 Sports Manager publishers (NEXON, Konami, SEGA, Nordeus, and NetEase) accounted for 63% of total revenues during this period

The category is highly competitive, with each of the Top 4 publishers accounting for revenue shares between 12-19%, across 1 to 2 titles apiece

NEXON & Nordeus are on the rise, capturing the highest revenue share in Q2 2021

# Racing Category Overview

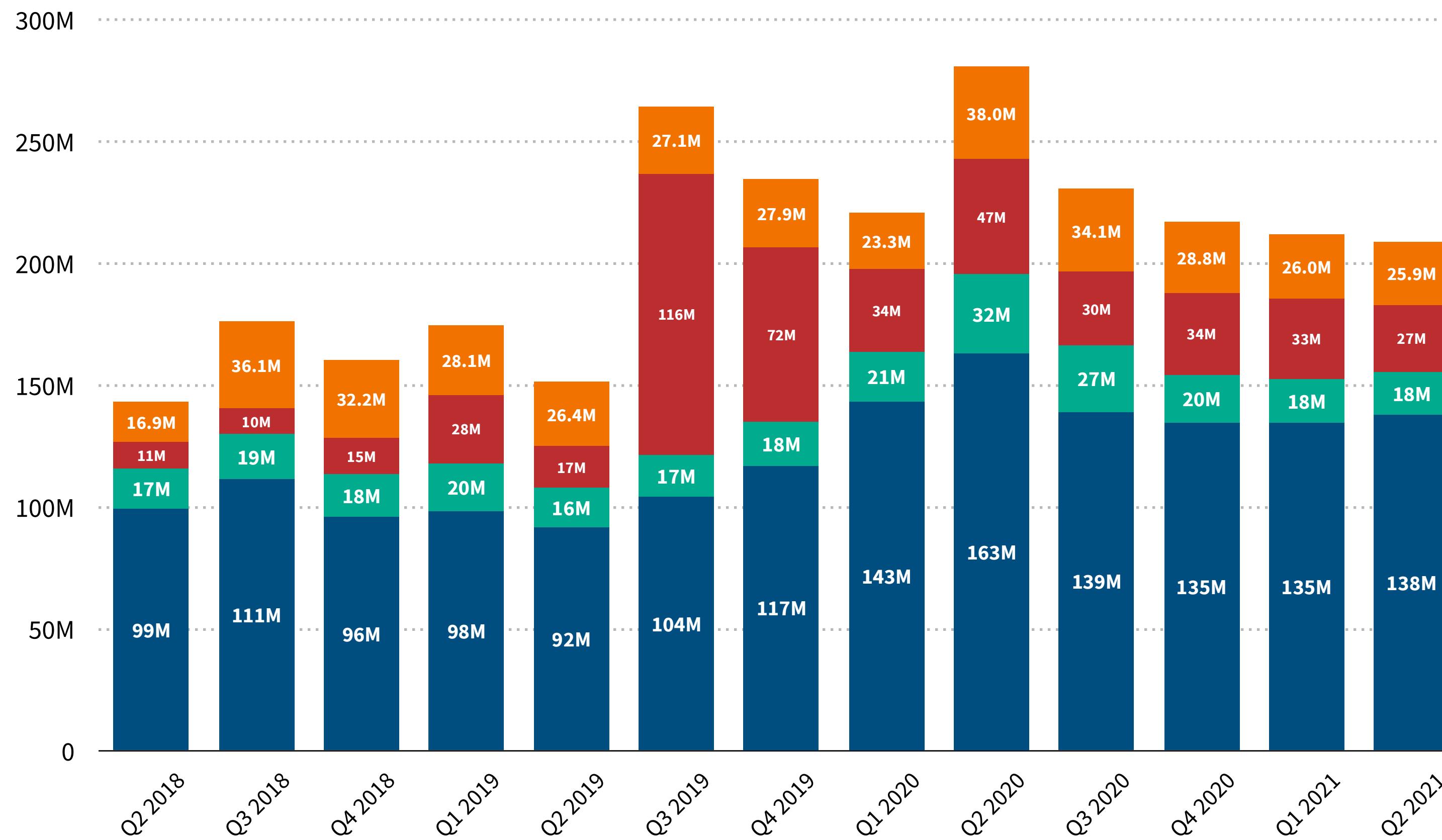


# Pandemic Caused Downloads To Increase in 2020

Global quarterly downloads of Racing games by sub-genres

[View in Game Intelligence](#)

■ Arcade Racing ■ Drag Racing ■ Kart Racing ■ Racing Simulator



The Racing games category has seen an increasing downloads trend since Q3 2019

The pandemic caused a large spike in downloads from 453M in Q1 2020 to 543M in Q2 2020. In 2020, the category had a total of 1.9B downloads, with a YoY growth of 22.3%

Realistic Racing had a YoY growth of 32% in 2020, significantly outperforming Arcade Racing which had a YoY growth of 9.6%

Downloads seem to have normalized to pre-Covid levels in Q1 2021

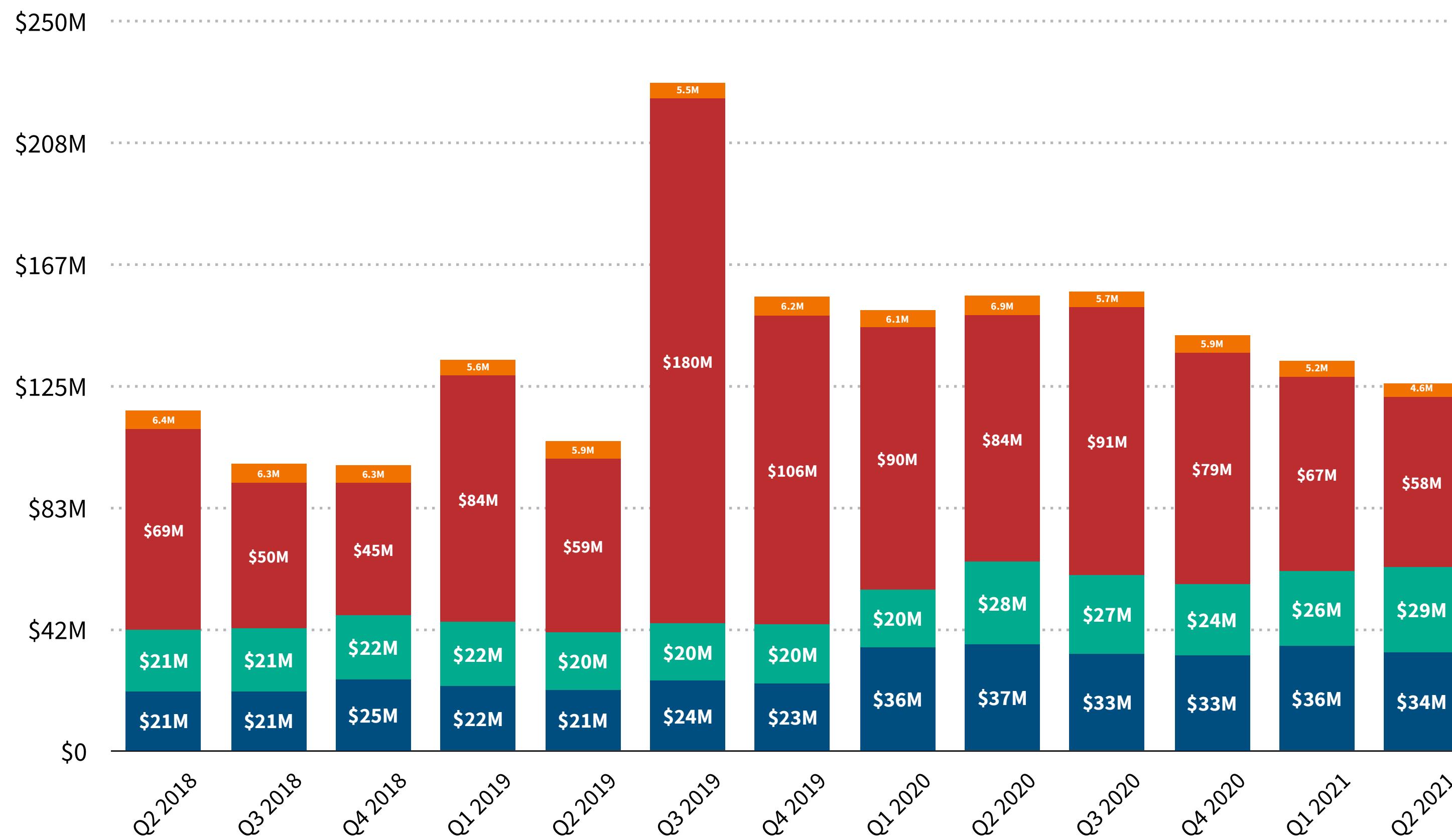
Android accounted for 87% of total downloads from Jan 2018 to Mar 2021

# Pandemic Did Not Have Large Impact on Revenues

*Global quarterly revenues of Racing games by sub-genres*

[View in Game Intelligence](#)

■ Arcade Racing ■ Drag Racing ■ Kart Racing ■ Racing Simulator



Revenues of the Racing games category saw a large increase from \$110M in Q2 2019 to \$235M in Q3 2019

Revenues dropped to \$160M in Q4 2019 and have stabilized with minor fluctuations thereafter

The pandemic does not seem to have caused a large impact on revenues. Q2 2020 and Q3 2020 witnessed a minor increase in revenues of Racing games. In 2020, the category had a total of \$626M revenues, with a YoY decline of 3.4%

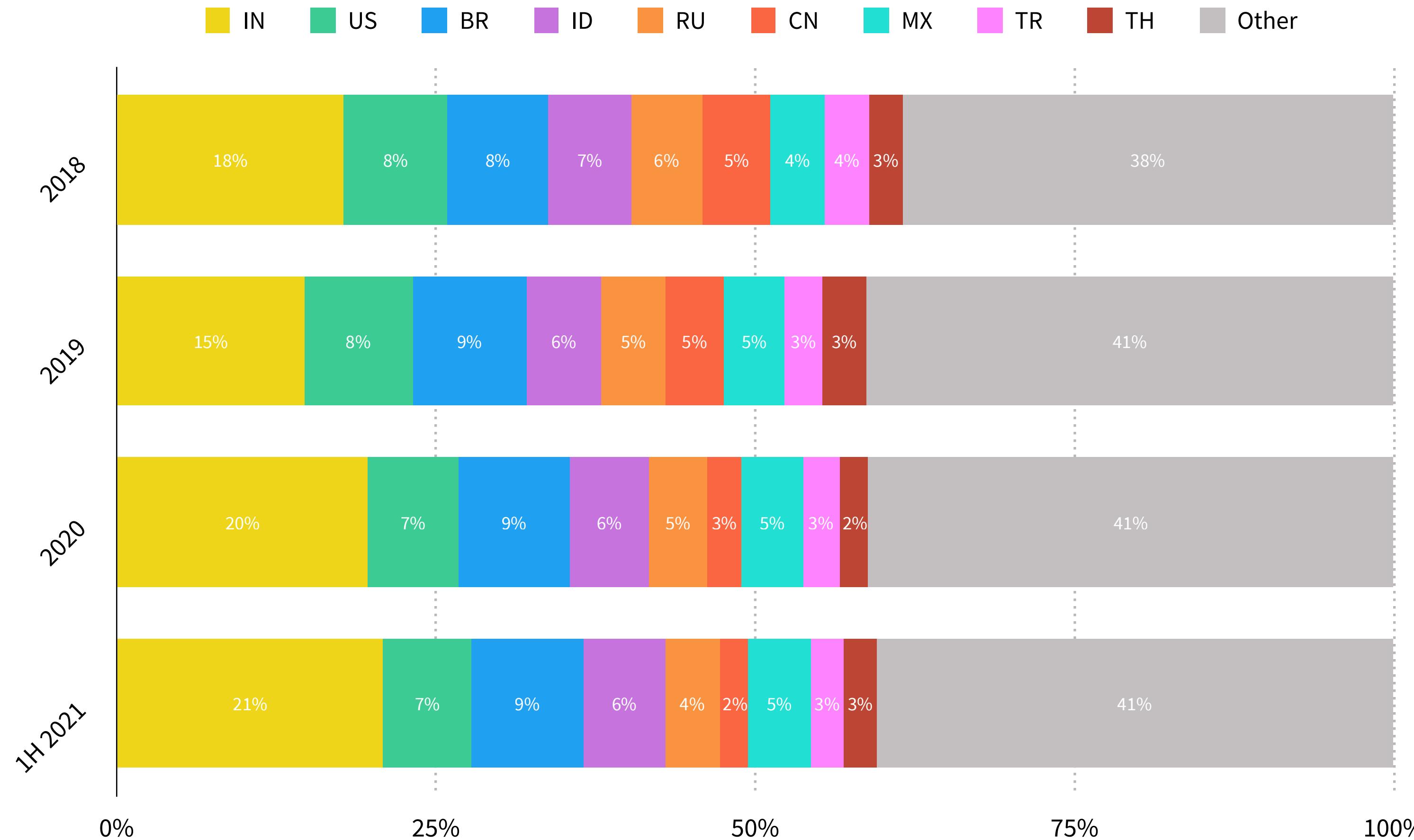
Realistic Racing had a YoY growth of 20% in 2020, significantly outperforming Arcade Racing which had a YoY decline of 13%

iOS accounted for 74% of total Revenues from Jan 2018 to Mar 2021

# India Has Most Downloads Share in Racing Category

Racing category download share by country

[View in Game Intelligence](#)



The top 5 countries with the highest downloads share from Jan 2018 to June 2021 are:

- India (18%)
- Brazil (9%)
- US (8%)
- Indonesia (6%)
- Russia (5%)

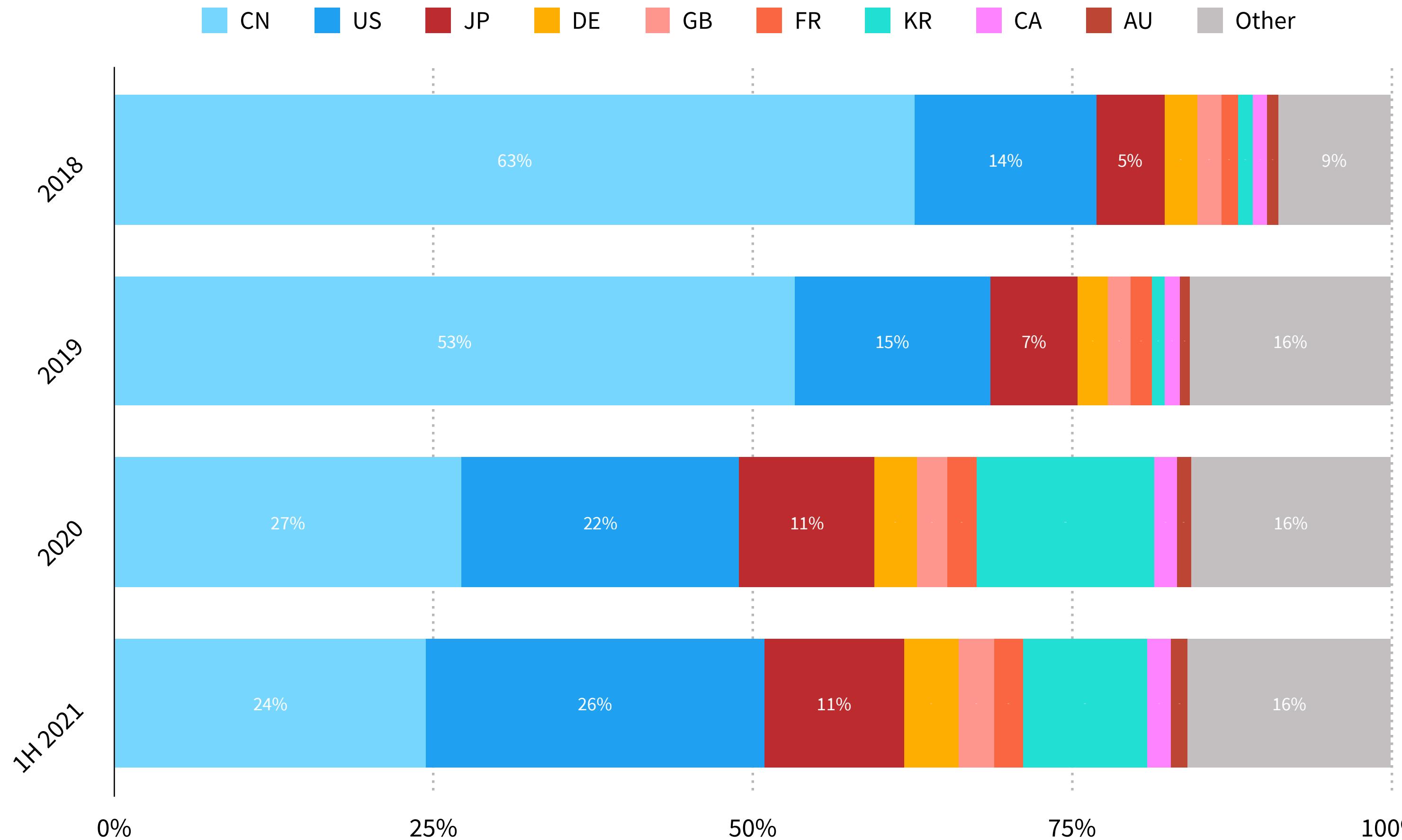
US dipped slightly in overall downloads share in 2020 and Q1 2021, while countries like India, Pakistan and Indonesia captured more market share

Downloads increased dramatically in India during the pandemic as India's market share grew from 15% in 2019 to 20% in 2020

# China Dominates Revenue Share for Racing Games

Racing category revenue share by country

[View in Game Intelligence](#)



The top 5 countries with the highest revenue share from Jan 2018 through June 2021 are:

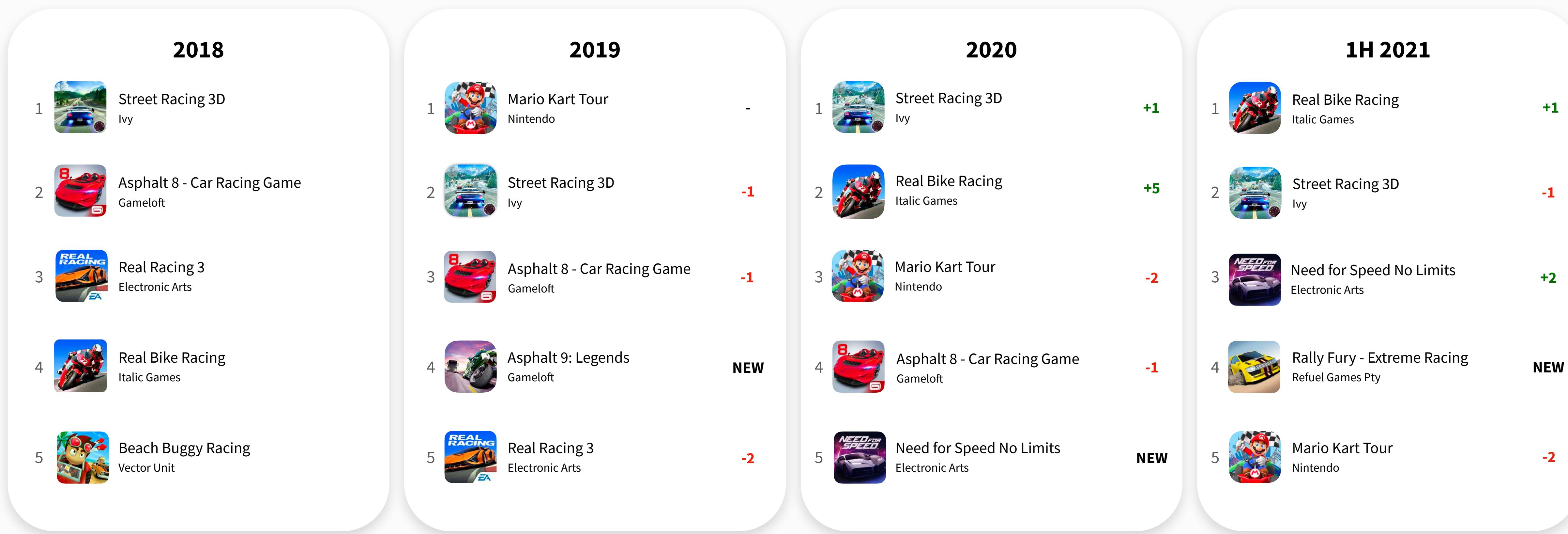
- China (44%)
- US (19%)
- Japan (8%)
- South Korea (6%)
- Taiwan (4%)

Asian countries dominate in revenues with 4 countries in the top 5

China lost significant revenue share in 2020 dropping from 53% in 2019 to 27% in 2020. On the other hand, US, Japan and South Korea all gained significant market share, with South Korea increasing from 1% in 2019 to 14% in 2020

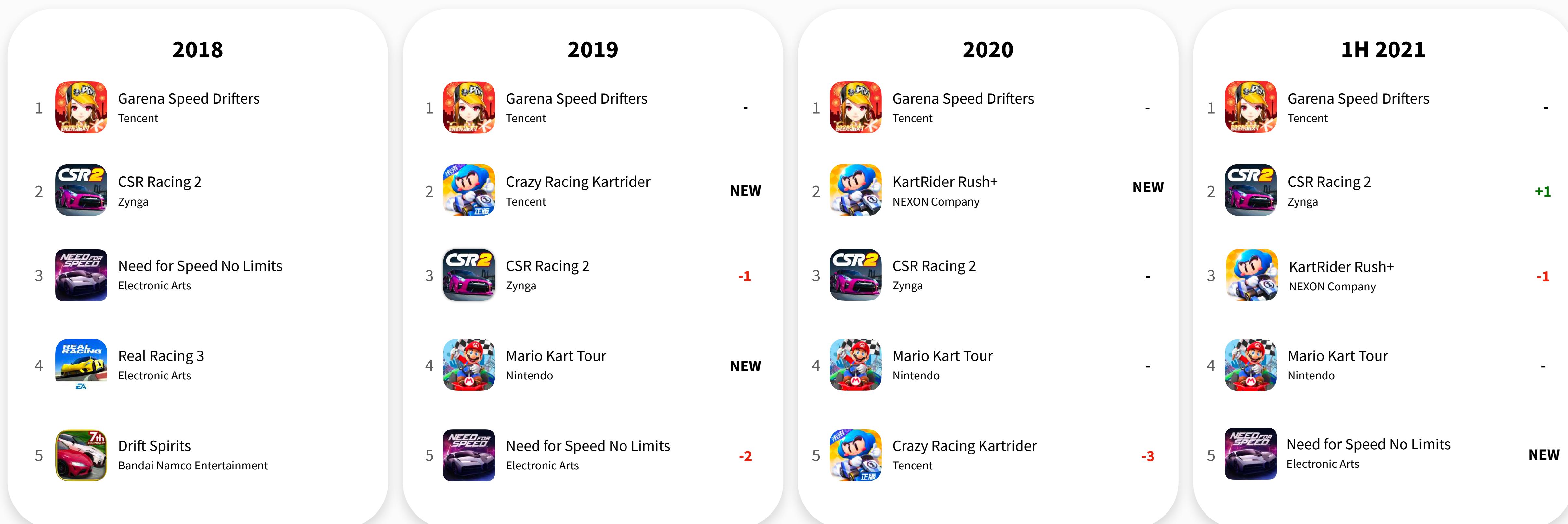
# Street Racing 3D Has Consistently Held a Top-2 Downloads Position

*Most installed Racing games on App Store and Google Play by year*



# Garena Speed Drifters and CSR Racing 2 Are Top Revenue Earners

Highest revenue generating Racing games on App Store and Google Play by year


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[View in Store Intelligence](#)
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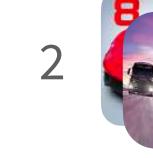
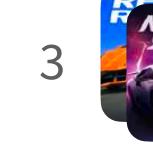
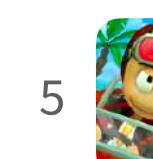
# Gameloft, Ivy, and Electronic Arts Captured Most Downloads in 2020

*Most popular Racing publishers by downloads on App Store and Google Play by year*

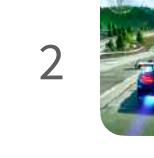
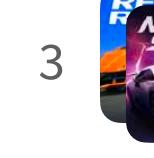
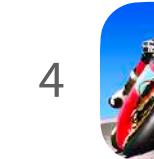
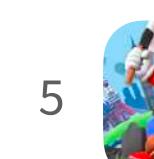
**2018**

1		Gameloft
2		Electronic Arts
3		Ivy
4		Tiramisu
5		Italic Games

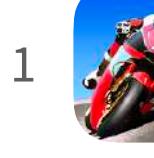
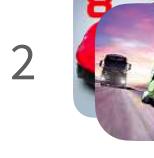
**2019**

1		Nintendo	-
2		Gameloft	-1
3		Electronic Arts	-1
4		Ivy	-1
5		Vector Unit	-

**2020**

1		Gameloft	+1
2		Ivy	+2
3		Electronic Arts	-
4		Italic Games	+2
5		Nintendo	-4

**1H 2021**

1		Italic Games	+3
2		Gameloft	-1
3		Ivy	-1
4		Electronic Arts	-1
5		Vector Unit	+1

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# Tencent and Zynga Earn Highest Revenues for Racing Games

*Most popular Racing publishers by revenues on App Store and Google Play by year*

**2018**



1 Tencent



2 Zynga



3 Electronic Arts

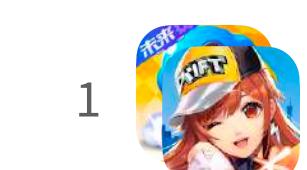


4 Gameloft



5 Bandai Namco

**2019**



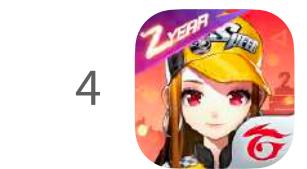
1 Tencent



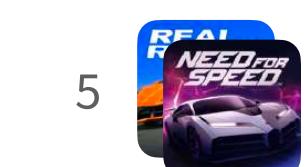
2 Zynga



3 Nintendo

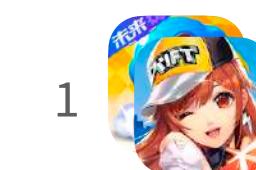


4 Garena Games Online



5 Electronic Arts

**2020**



1 Tencent



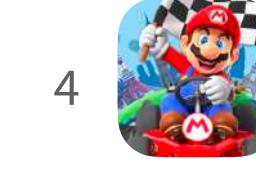
2 NEXON Company

**NEW**



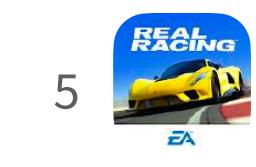
3 Zynga

**-1**



4 Nintendo

**-1**



5 Electronic Arts

**-**

**1H 2021**



1 Tencent



2 Zynga

**+1**



3 NEXON Company

**-1**



4 Nintendo

**-**



5 Bandai Namco

**NEW**

[View in Store Intelligence](#)

[View in Store Intelligence](#)

[View in Store Intelligence](#)

[View in Store Intelligence](#)

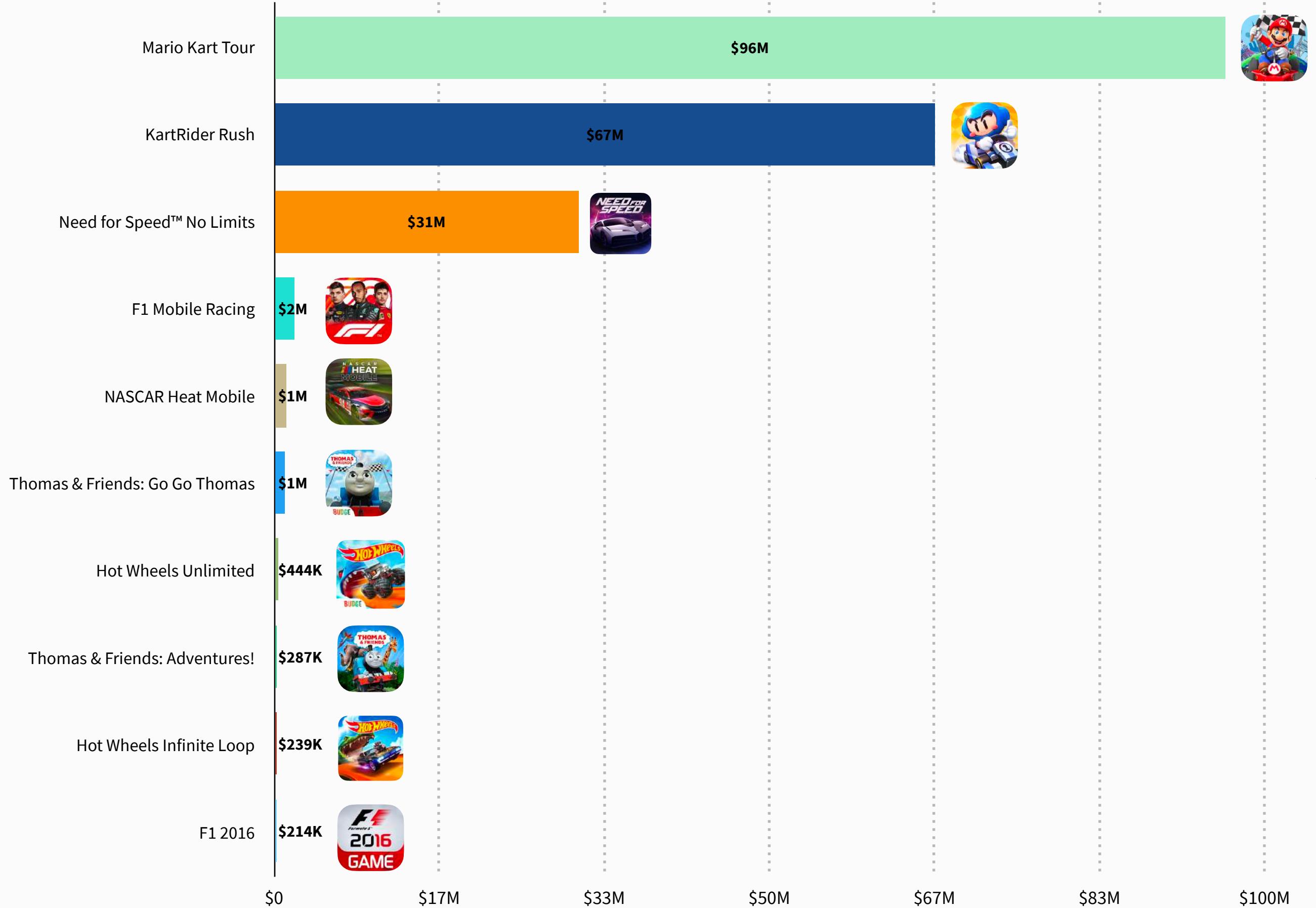
# Mario Kart Leads IP Games in Both Downloads and Revenue

Revenues and Downloads of Popular IP Games in Racing category

[View in Store Intelligence](#)

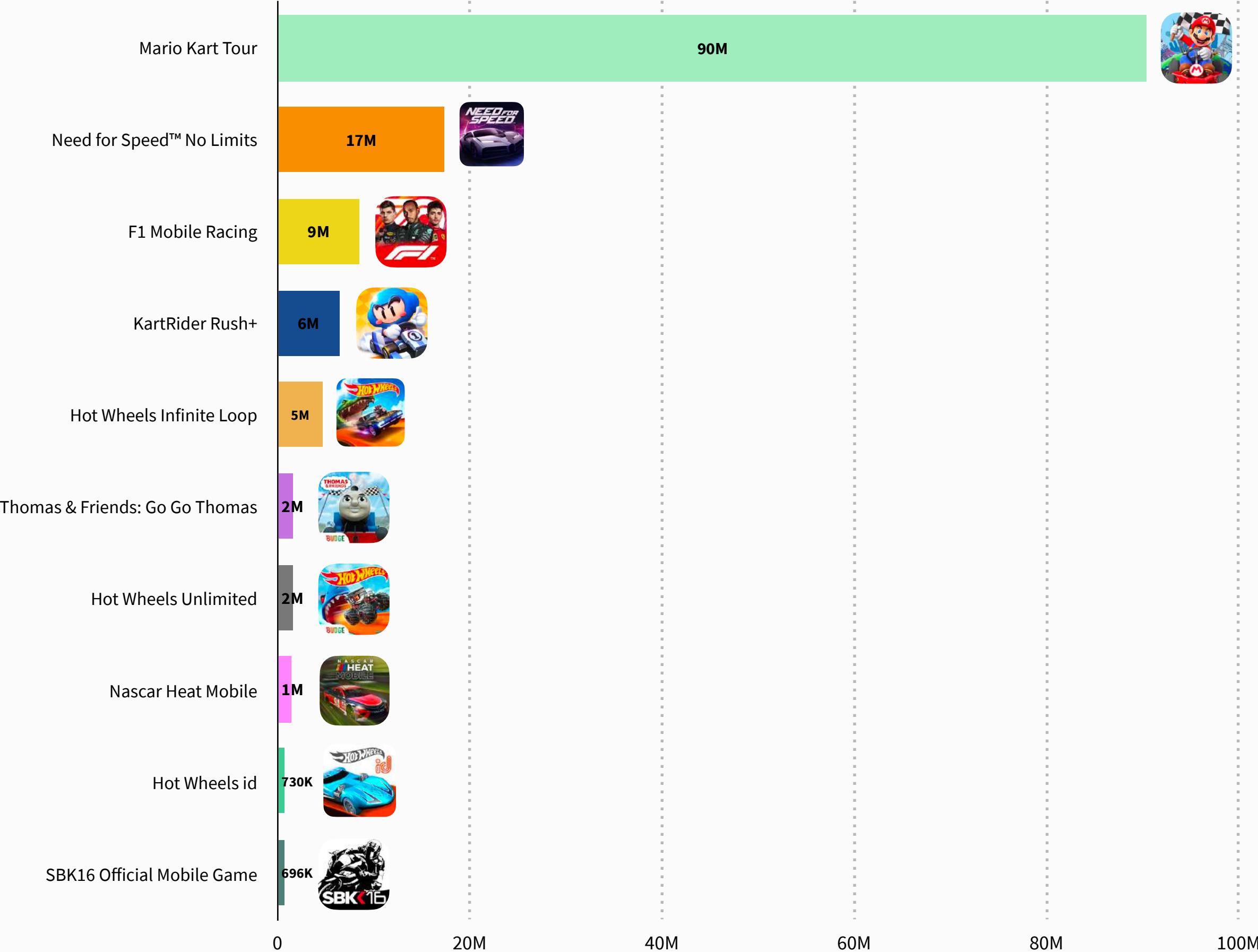
## Top IP Games by Revenue

(Last 2 Years)



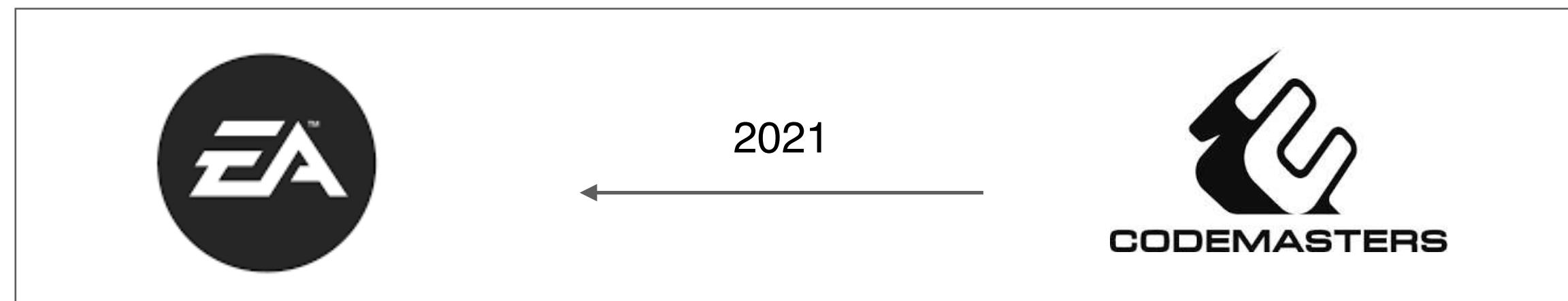
## Top IP Games by Downloads

(Last 2 Years)



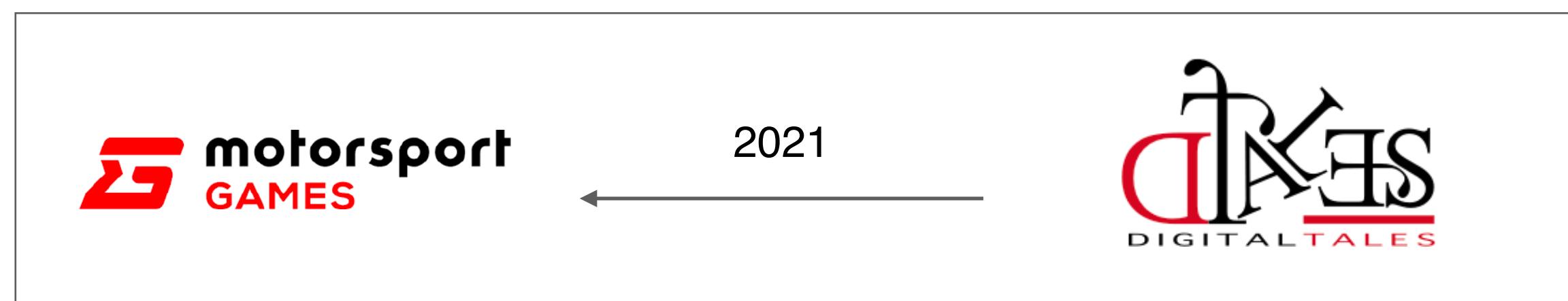
# Acquisitions in Racing Category to Expand Portfolio

*Recent M&A activity among top publishers in Racing Category*

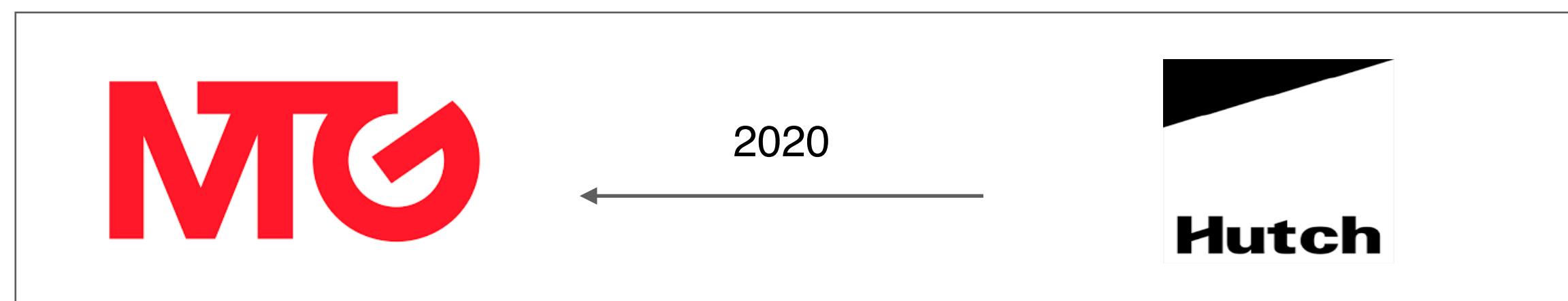


The Racing Category has seen a lot of M&A activity in recent months

EA completed its acquisition of UK racing specialist Codemasters for \$1.2 billion. EA has also announced it wants to publish a new racing game every year



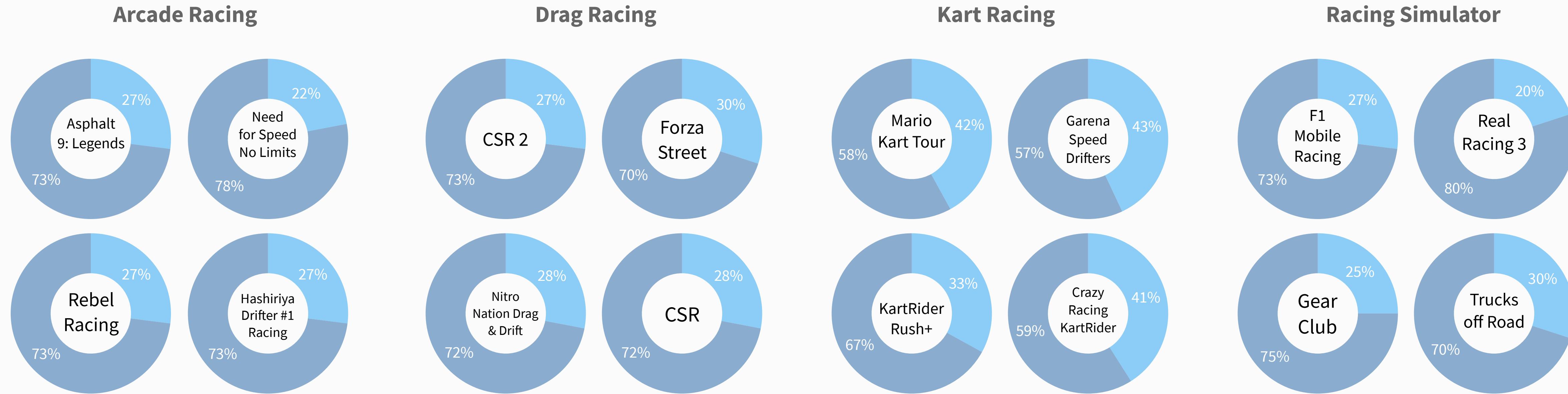
Motorsports Games signed a binding term sheet in Mar 2021 to acquire Digital Tales USA (developer of mobile games for the FIM Superbike World Championship)



Sweden's MTG acquired Hutch Games, the London-based game studio behind popular mobile racing games such as Rebel Racing, F1 Manager and Top Drives

# Most Racing Games Have High Male User Base, but Kart Racing Is More Balanced

Average demographic data of Top Racing Games by sub-genres on App Store

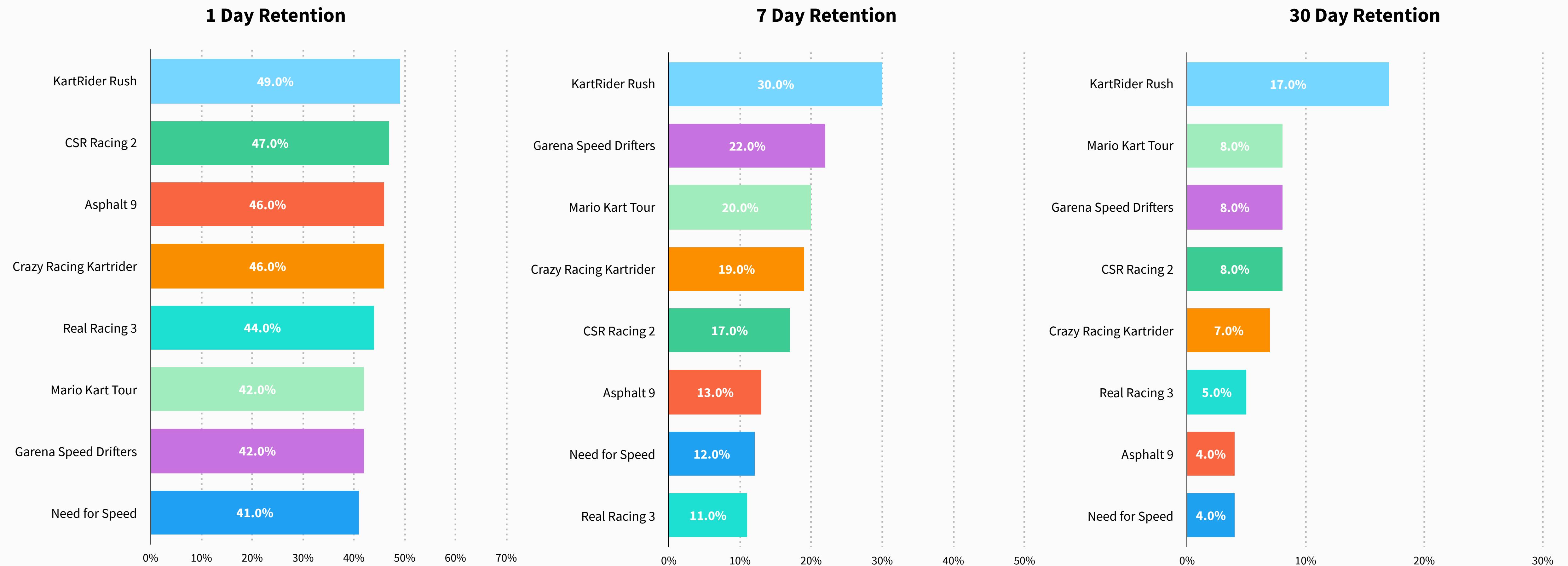


● Male      ● Female

\*Below average data fidelity

# Kart Racing Titles Lead in Day 1-30 Retention

*Average retention rates of Top Racing games*



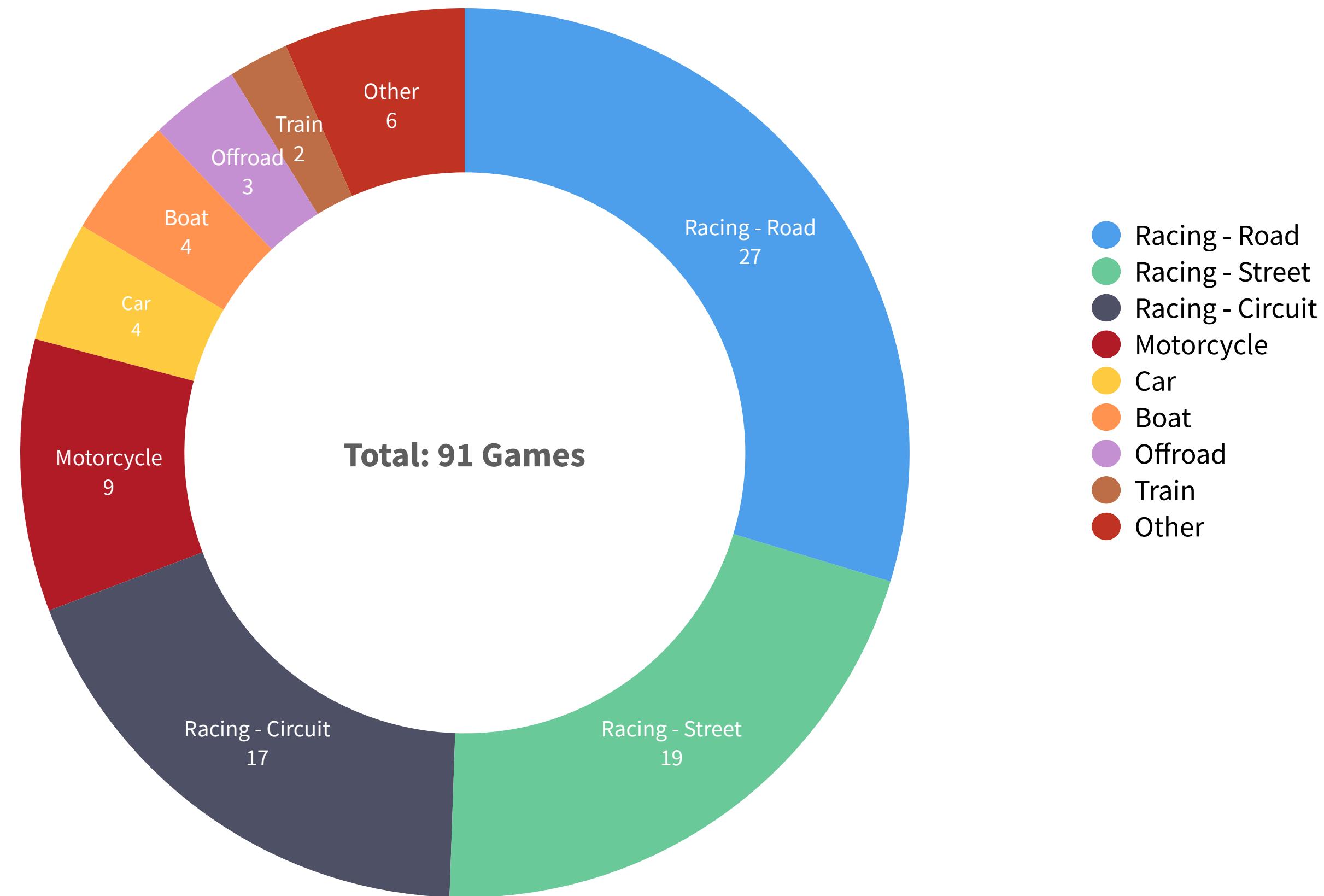
# A Closer Look at Arcade Racing



# Road, Street, and Circuit Arcade Racing Titles Are Popular

*Breakdown of top Arcade Racing games by themes*

[View in Store Intelligence](#)



**Arcade Racing is the most popular Racing subgenre, accounting for 91 of the 160 Racing titles**

Within Arcade Racing, popular themes are Road-, Street-, and Circuit-Racing, as well as Motorcycles, Cars, Boats, and Offroad

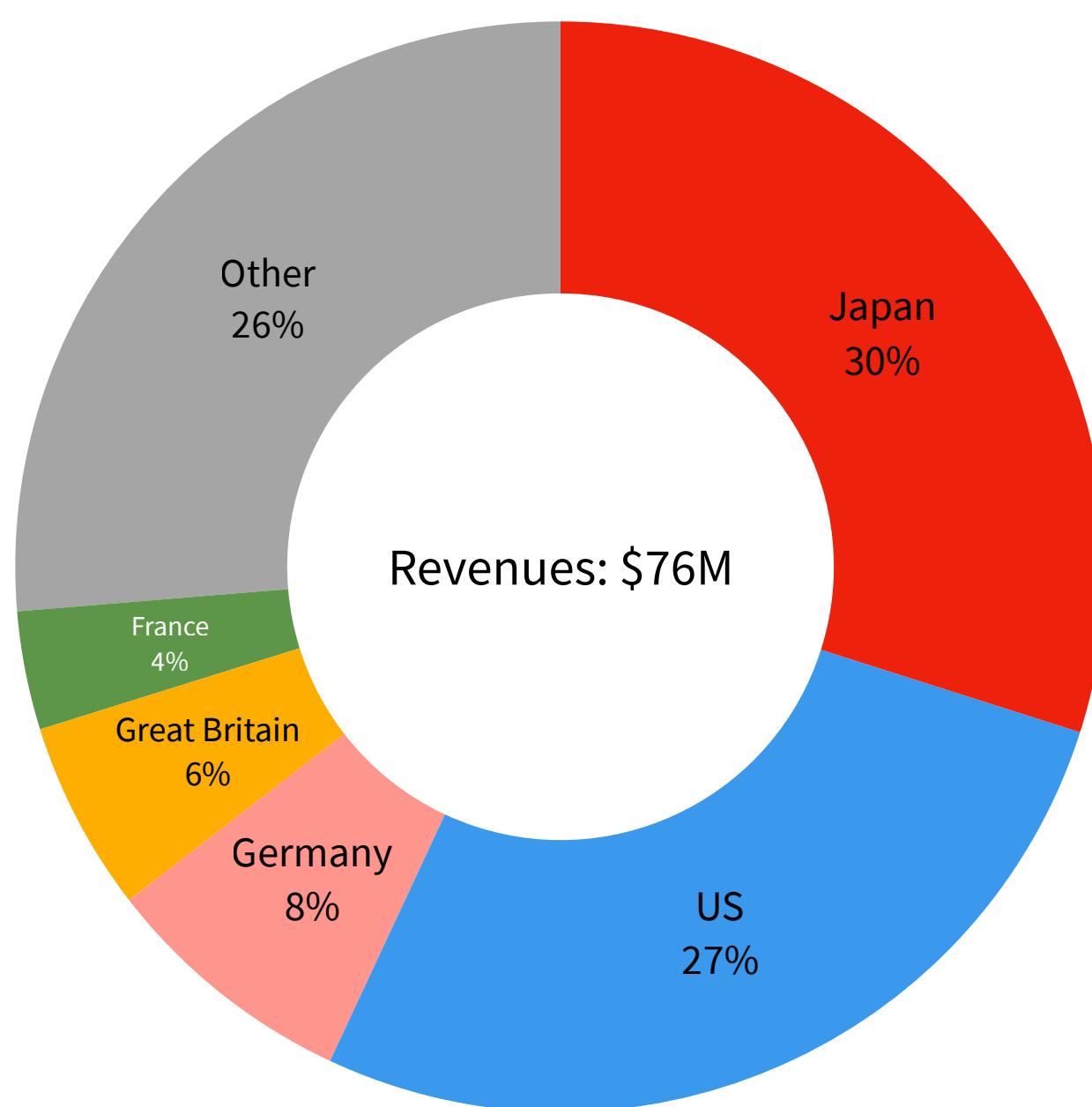
**Most Arcade Racing games feature 3D art style:**  
36 games have 3D Realistic art style while 35 games have 3D Cartoon art style. There are also 12 2D Cartoon games in this cohort

# Road and Street Titles Earn Most Revenues in US and Asia

*Country Breakdown for top 2 Arcade Racing themes (Road and Street) by revenues*

Revenues of Road Racing games

(Jan 2020 through June 2021)

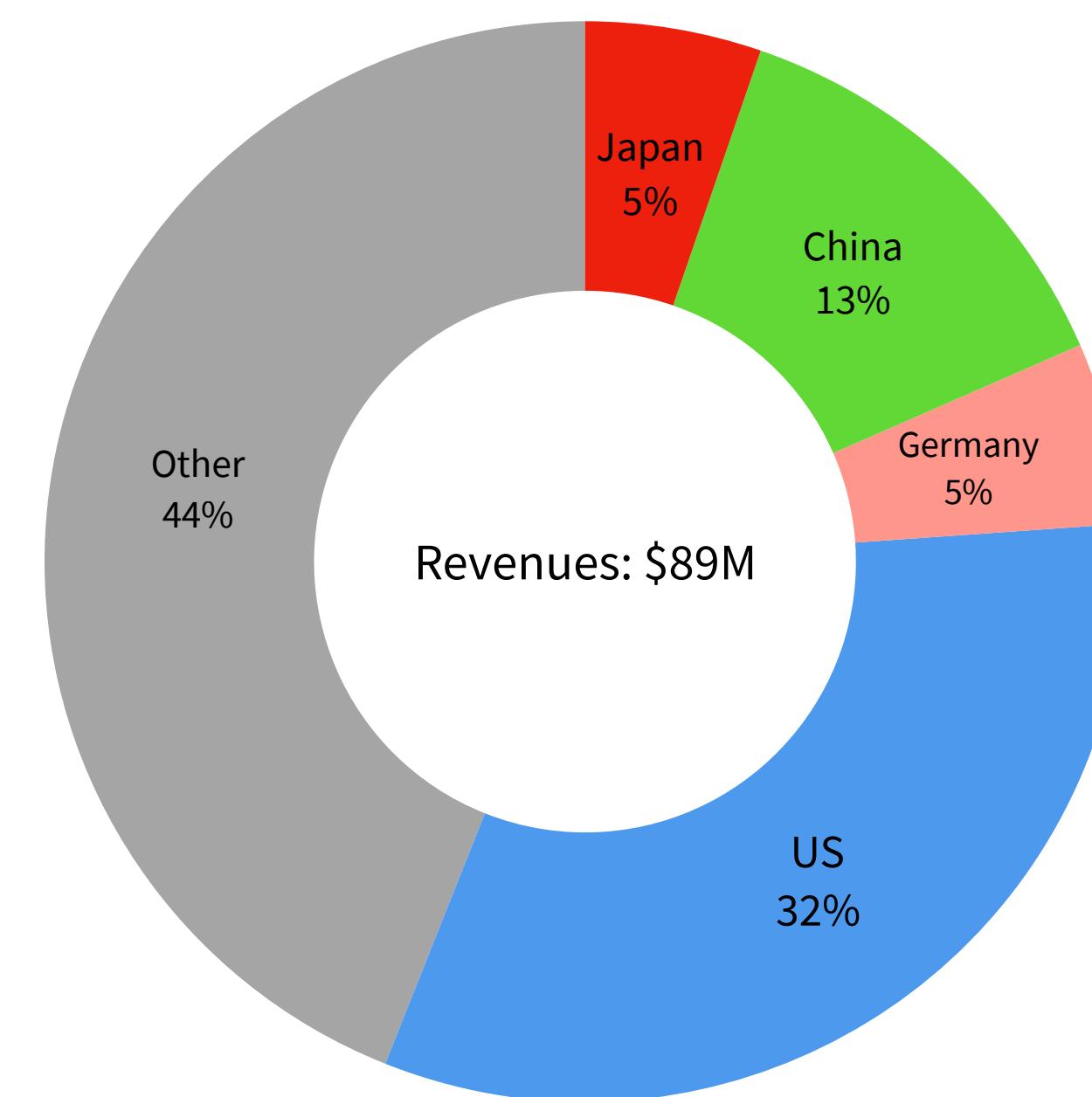


[View in Store Intelligence](#)

Arcade Racing

Revenues of Street Racing games

(Jan 2020 through June 2021)



[View in Store Intelligence](#)

While US, China and Japan are the highest-grossing countries across these two themes, other Asian countries like South Korea, Taiwan and Japan also rank high in overall revenue share for these games, as do European countries like Germany, Great Britain, and France

The top 3 revenue-generating Road games during this period were:

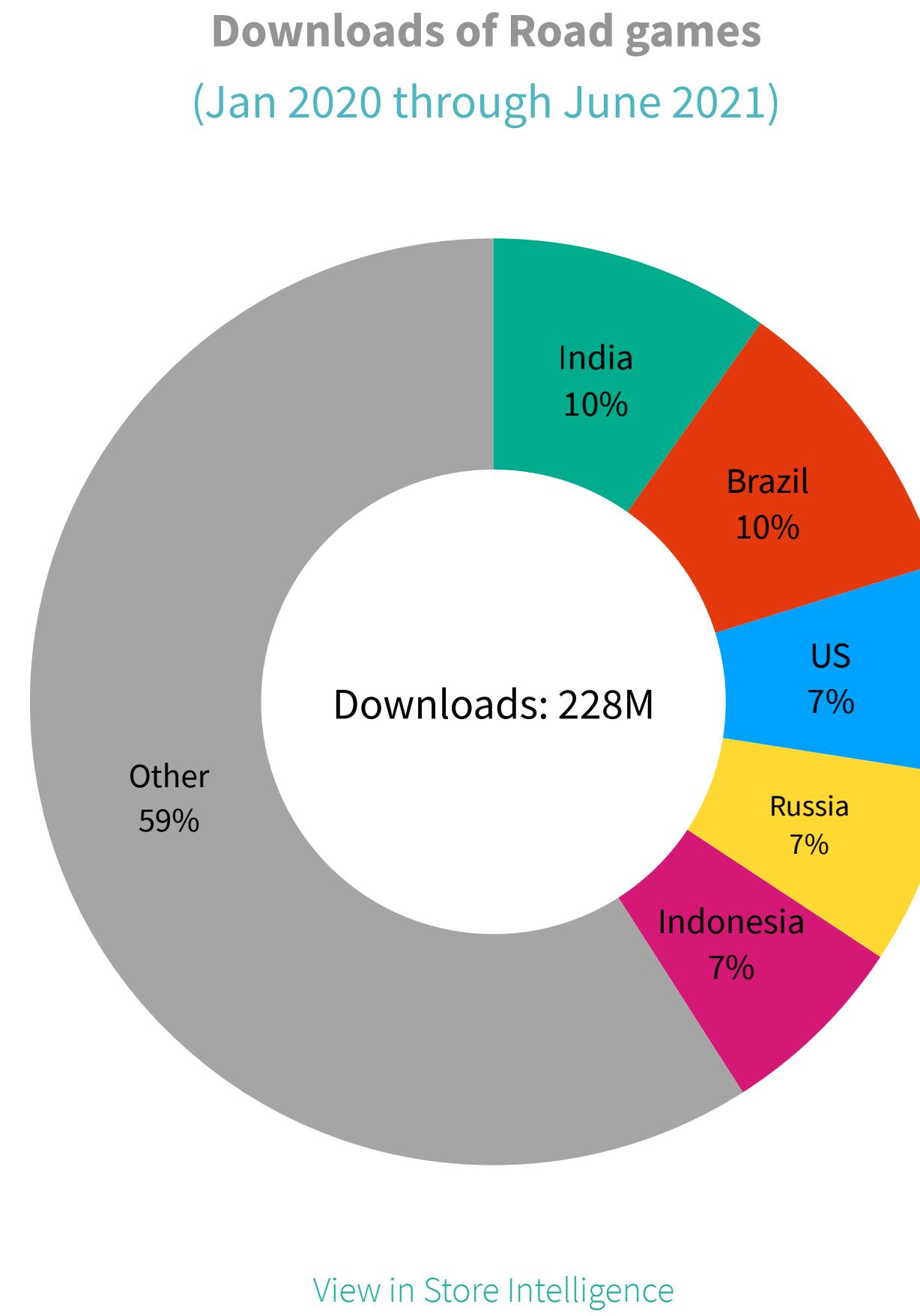
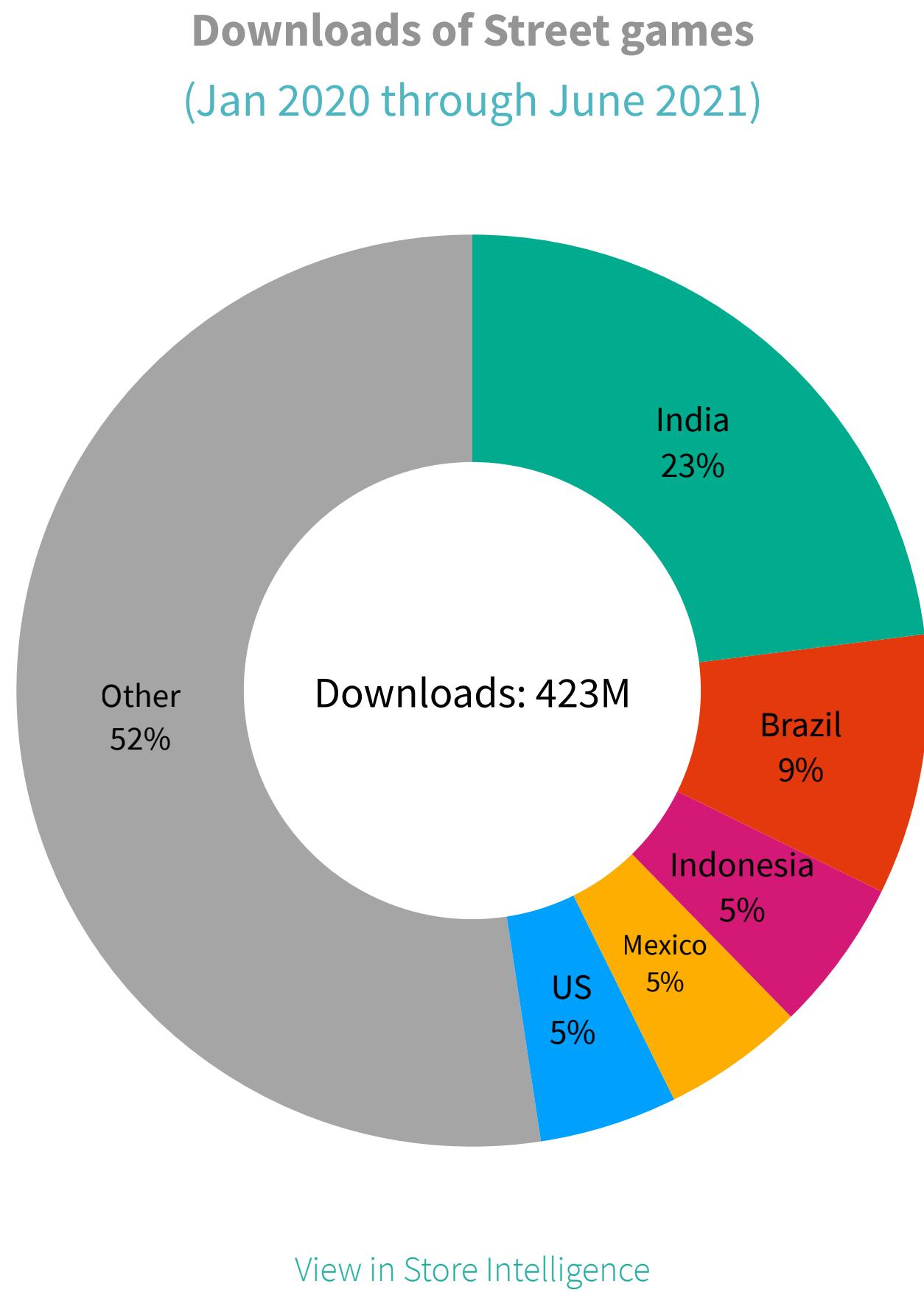
- *Top Drives - Car Cards Racing* (35%)
- *Drift Spirits* (27%)
- *Rebel Racing* (14%)

The top 3 revenue-generating Street games were:

- *Need for Speed - No Limits* (49%)
- *Asphalt 9: Legends* (38%)
- *Asphalt 8 - Car Racing* (9%)

# Car and Motorcycle Games Are Popular in India

*Country Breakdown for top 2 Arcade Racing themes (Street and Road) by downloads*



Street and Road Racing games are most downloaded in India, Brazil, and US, but aside from India's 23% download share of street games, no one market accounts for more than 10% of worldwide downloads

The top 3 most downloaded Road games during this period were:

- *Rally Fury - Extreme Racing* (25%)
- *Rebel Racing* (15%)
- *Drift Max Pro* (14%)

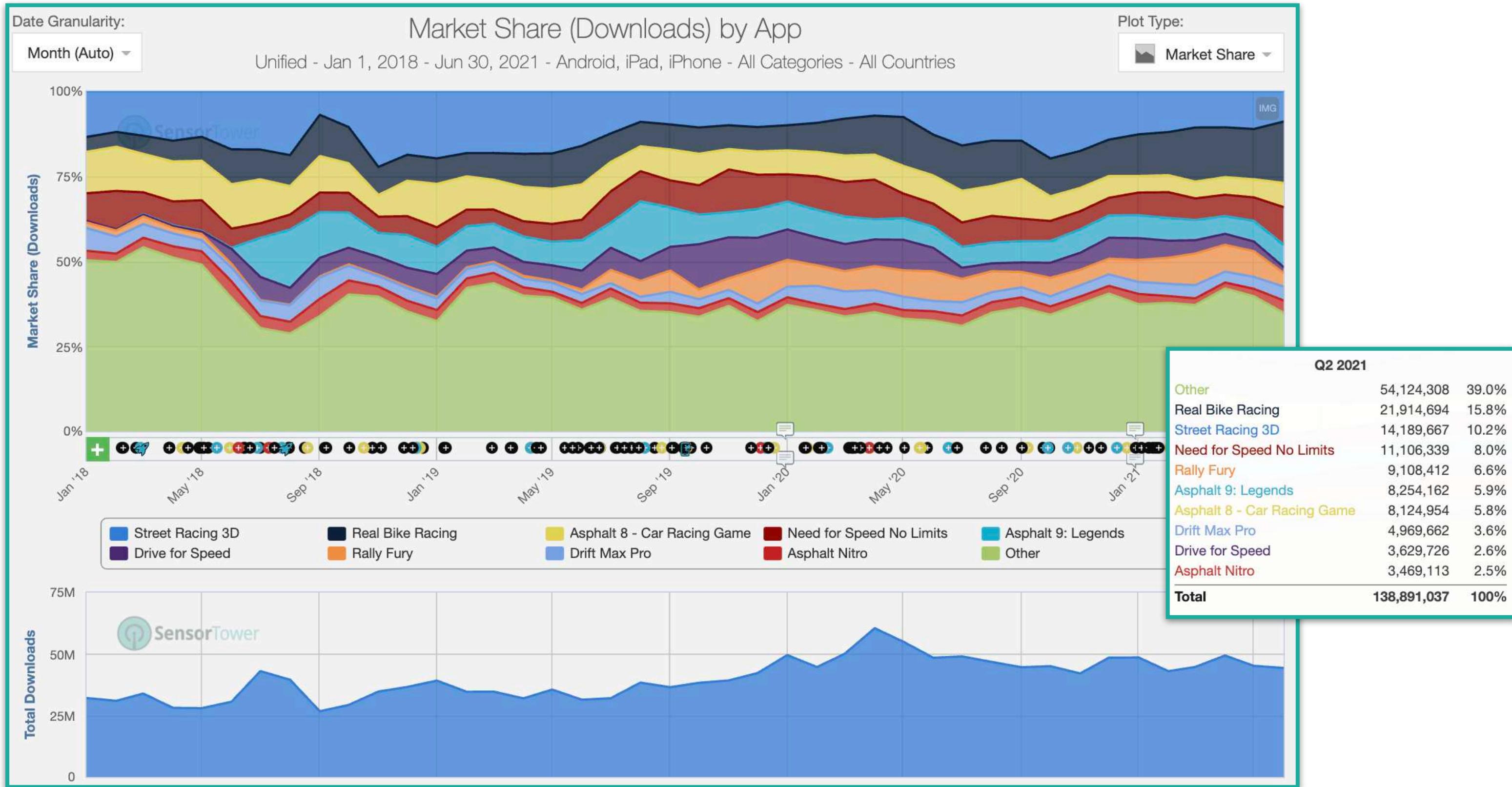
The top 3 most downloaded Motorcycle games during this period were:

- *Street Racing 3D* (24%)
- *Need for Speed - No Limits* (16%)
- *Asphalt 8* (15%)

# Arcade Racing Showing Moderate Downloads Growth

Download share of top 100 Arcade Racing games, Jan 2018 and June 2021

[View in Store Intelligence](#)



Total downloads of Top 100 Arcade Racing games have grown at a 9.7% CAGR since Jan 2018, and typically range between 35M-45M downloads per month. Downloads peaked at 60.5M during April 2020, amid the first wave of the COVID-19 pandemic

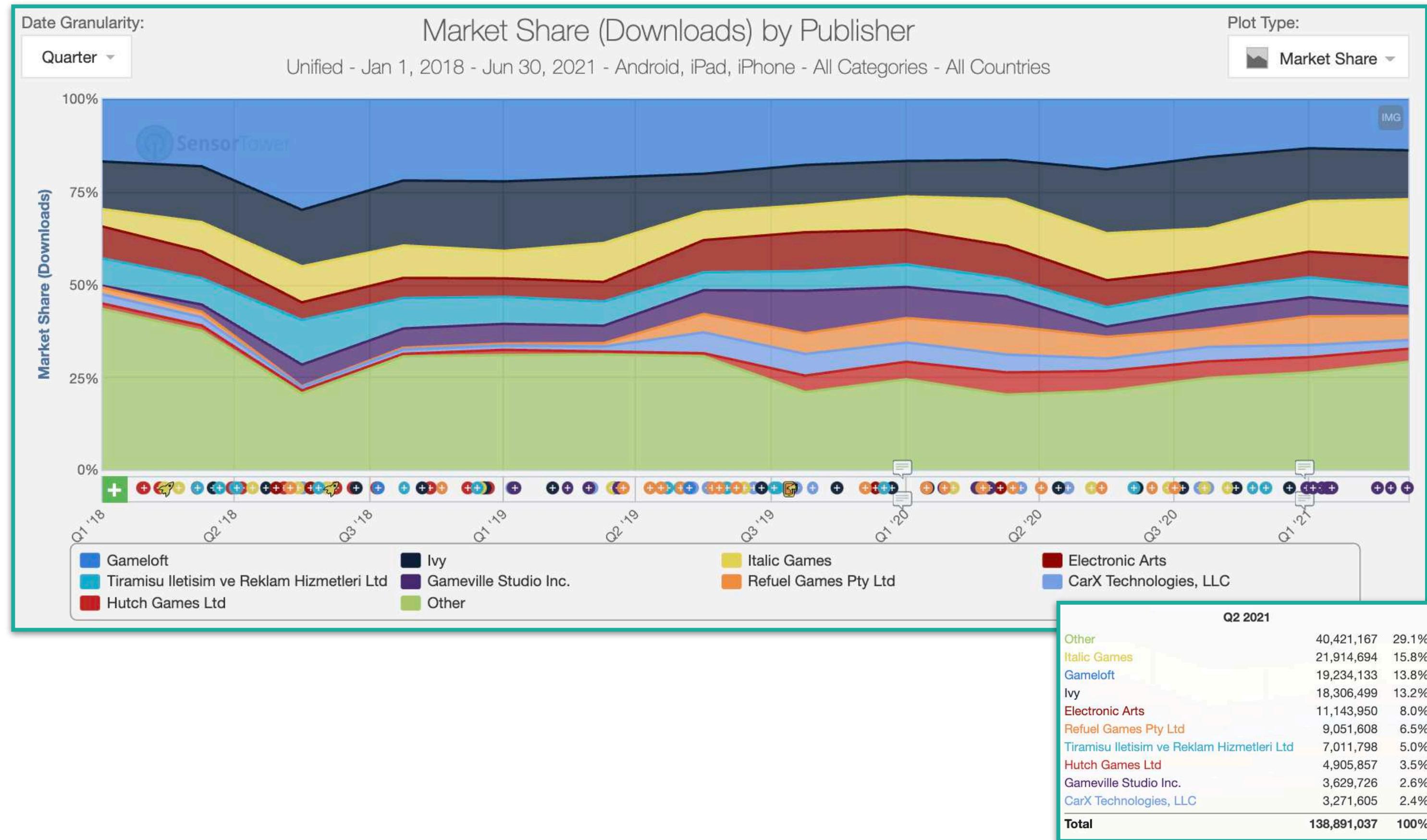
Since Jan 2018, the top 5 games are *Street Racing 3D* (13% downloads share), *Real Bike Racing* (10%), *Asphalt 8* (9%), *Need for Speed No Limits* (7%), and *Asphalt 9: Legends* (7%)

*Real Bike Racing* is the most downloaded title in 1H 2021, with a 16% downloads share in Q2 2021

Android devices account for 86% of total downloads, while iOS takes 14%. By country, India is the No.1 market for Arcade Racing games with 20% downloads share, followed by Brazil (9%), Indonesia (7%), and US (6%)

# Gameloft Leads the Way in Downloads Since 2018

Publisher downloads for top 100 Arcade Racing games, Jan 2018 to June 2021 [View in Store Intelligence](#)



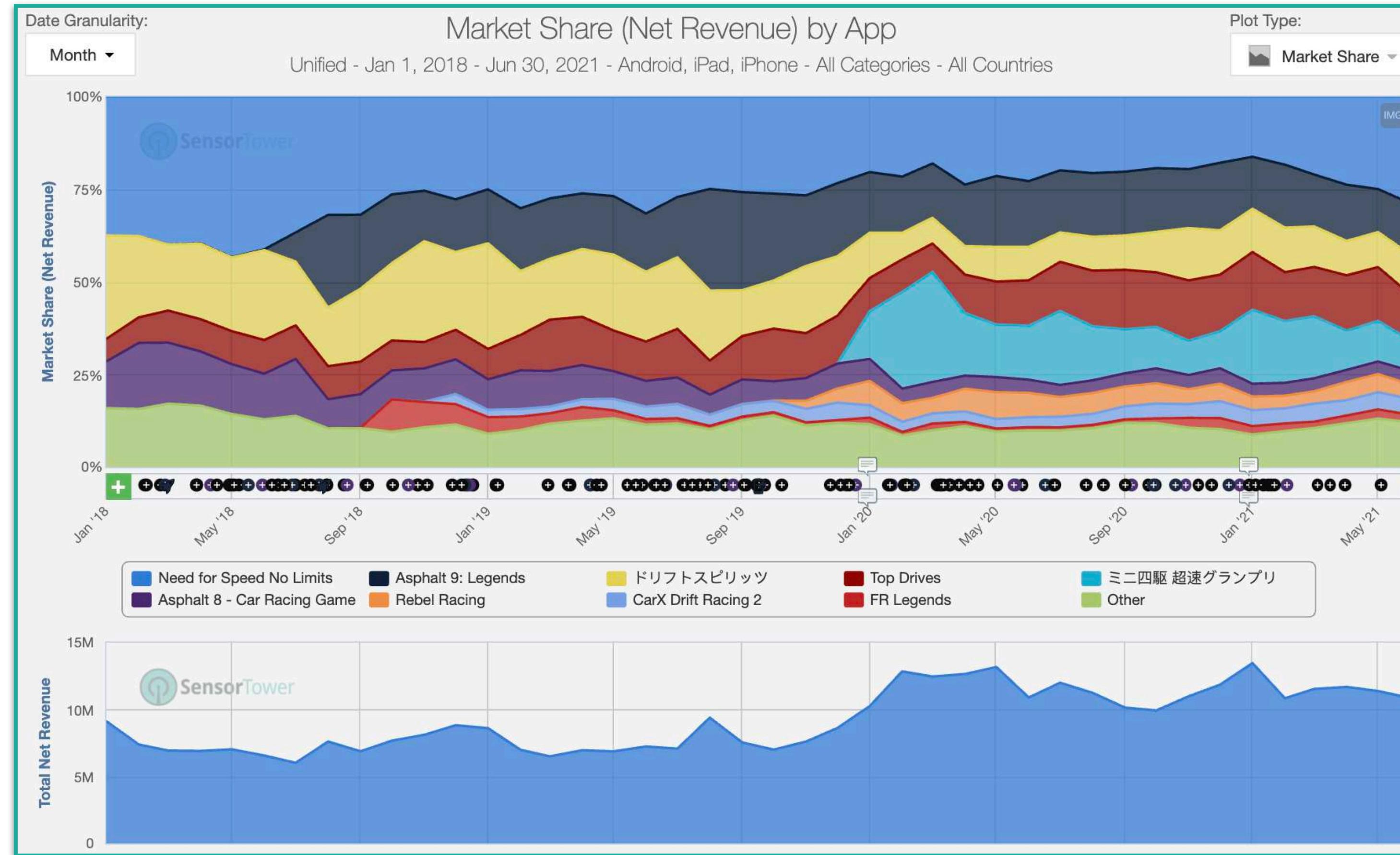
The top 5 Arcade Racing publishers (Gameloft, Ivy, Italic Games, Electronic Arts, Tiramisu) accounted for 57% of total downloads during the period. No one publisher accounted for more than 18%

Among these 5, Gameloft has been the historic market leader, driven by the success of its Asphalt series ([Asphalt 8](#), [Asphalt 9](#)). However Italic Games' [Real Bike Racing](#) captured the most downloads in the most recent quarter (Q2 2021)

Refuel and Hutch Games have entered the category in the last 2 years and have consistently grown their share since

# Stable Revenue Trend Since Last 18 Months

Revenue share of top 100 Arcade Racing games, Jan 2018 through June 2021 [View in Store Intelligence](#)



Total revenue of Top 100 Arcade Racing games has grown at a 11% CAGR since Jan 2018, and typically ranges between \$5M-\$15M per month

Revenues peaked in Jan 2021 due in part to a significant revenue spike for Bandai Namco's **Mini 4WD Super Speed Grand Prix**

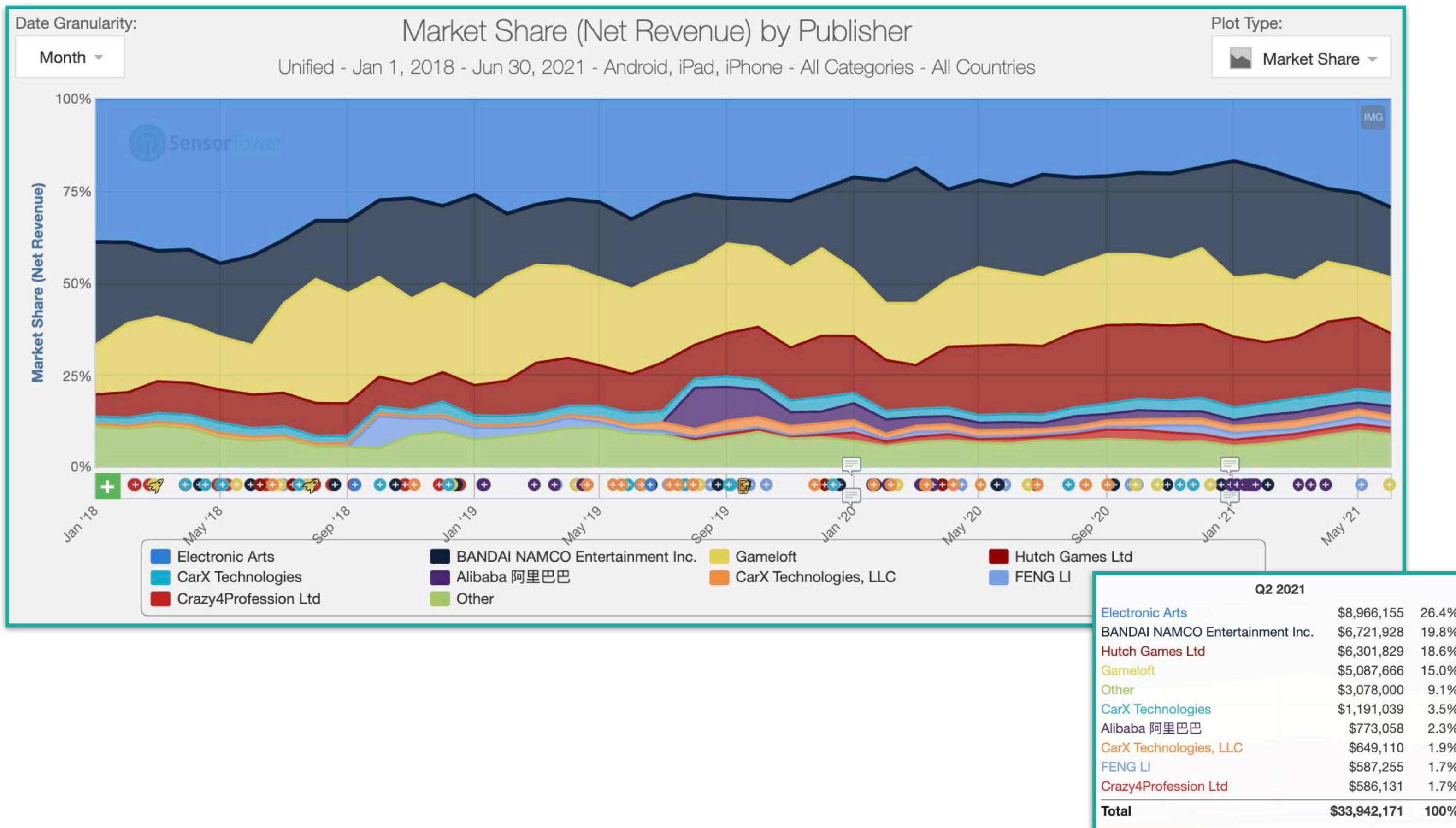
Since Jan 2018, the top 5 revenue earners are **Need for Speed - No Limits** (25% revenue share), **Asphalt 9: Legends** (15%), **Drift Spirits** (15%), **Top Drives - Car Cards Racing** (11%), and **Mini 4WD Super Speed Grand Prix** (8%)

iOS devices account for 55% of total revenues. Japan is the No.1 market with 27% revenue, followed by US (24%) and China (8%)

# Tencent Captures Over 50% Revenue Share

Publisher revenues for top 100 Arcade Racing games, Jan 2018 through June 2021

[View in Store Intelligence](#)



The top 5 highest-grossing publishers (Electronic Arts, Bandai Namco, Gameloft, Hutch Games, CarX Technologies) in this sub-genre account for 86% of total downloads

Among these 5, Electronic Arts is the historic market leader with 26% revenue share from Jan 2018 to June 2021, followed closely by Bandai Namco at 23%

Over the course of this period, Electronic Art's monthly revenue share has decreased from over 40% in 2018 to as low as 17% in Jan 2021, with the success of Hutch Games' *Rebel Racing* and *Top Drives* growing its revenue share from 6% to 16% over the same period

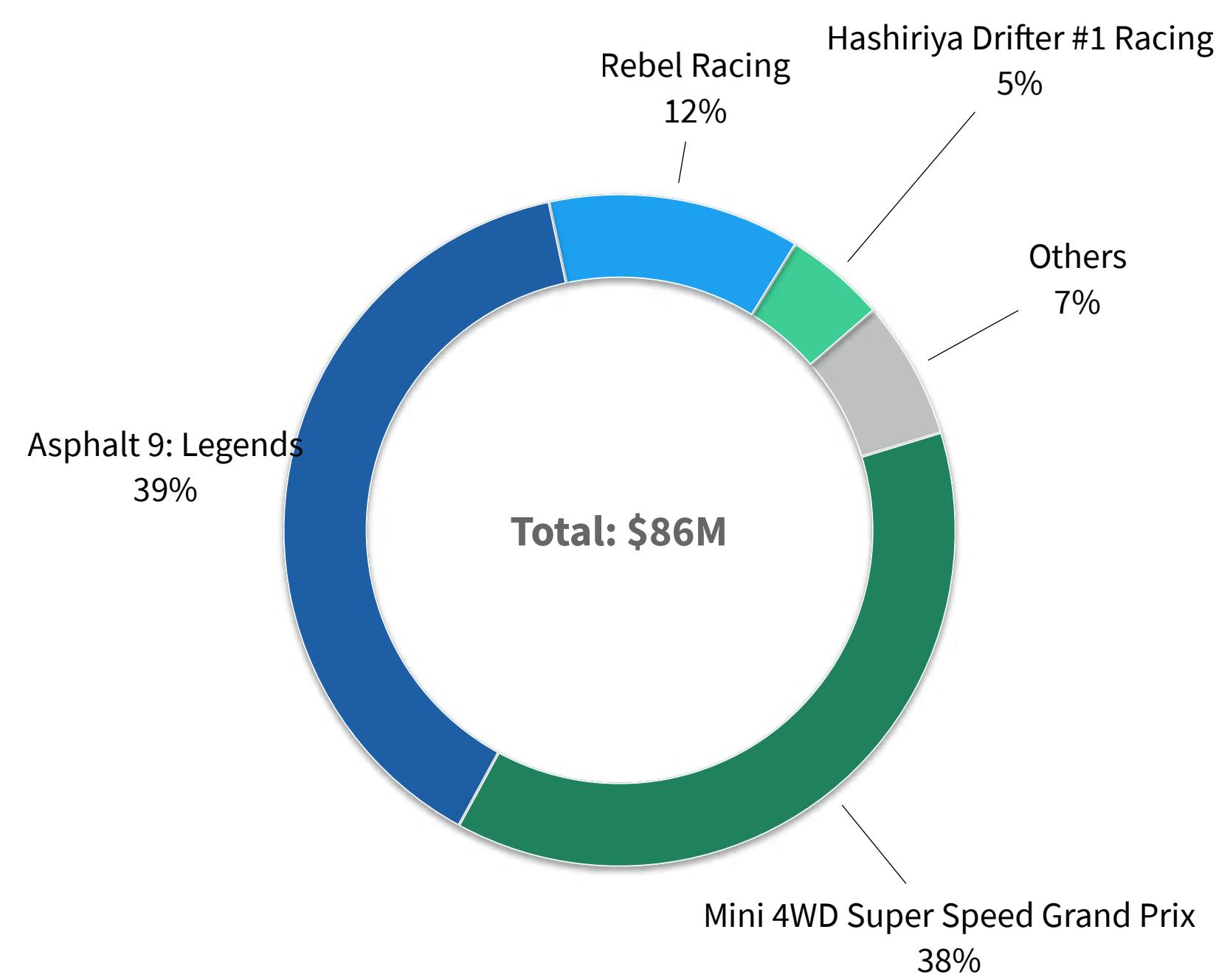
# 2 New Titles Captured Significant Revenue Share

*Downloads and Revenues of Top New Arcade Racing Games*

[View in Store Intelligence](#)

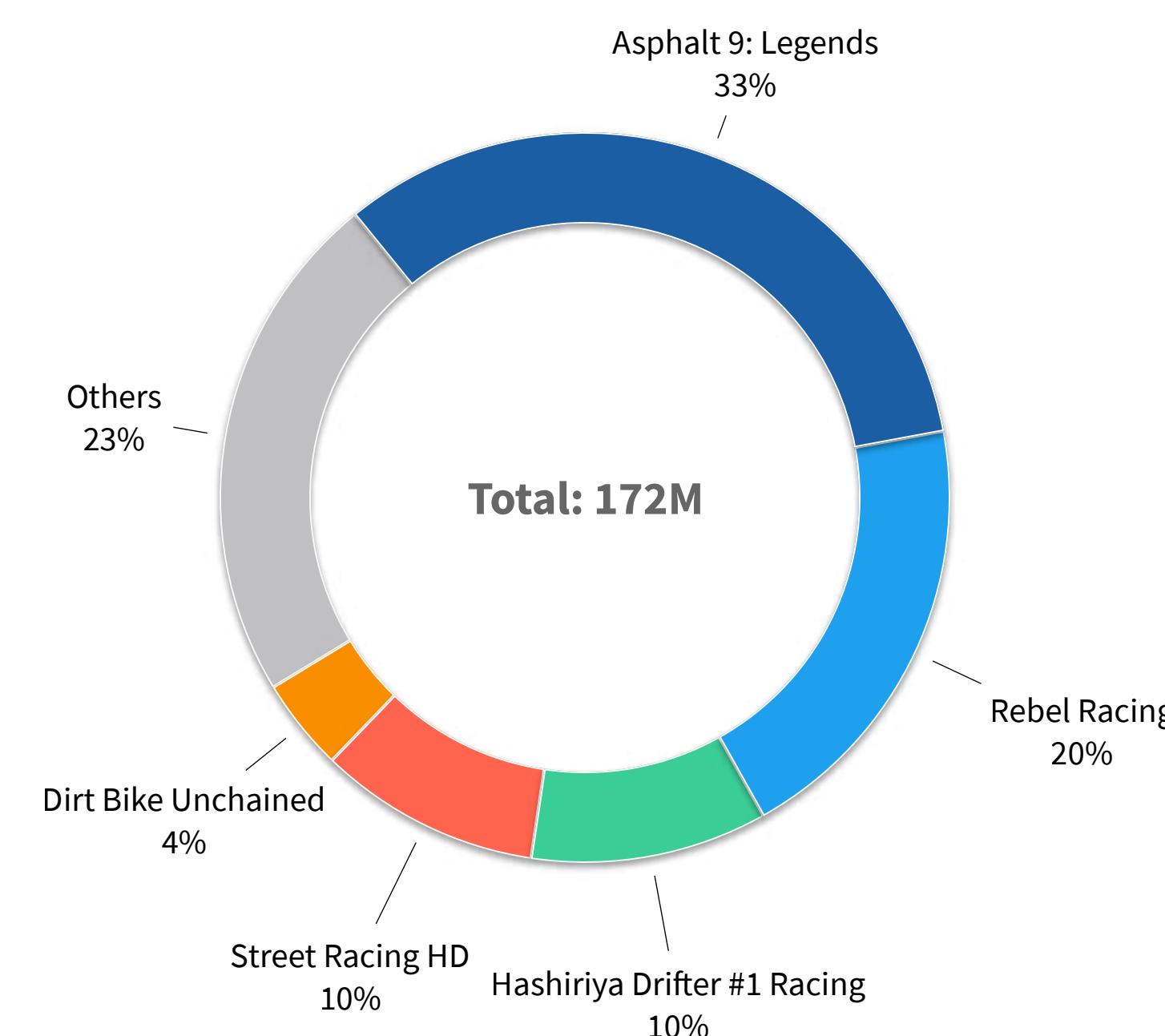
**Top Games by Revenue**

(Jan 2020 to June 2021)



**Top Games by Downloads**

(Jan 2020 to Mar 2021)



23 new Arcade Racing games have been released in the last 2 years, 9 of which had a Road Racing theme

Gameloft's *Asphalt 9: Legends* and Bandai Namco's *Mini 4WD Super Speed Grand Prix* are the highest-grossing new titles, with *Asphalt 9: Legends* leading in downloads as well

Hutch Games' *Rebel Racing* also captured significant revenue and downloads share, at 12% and 20%, respectively

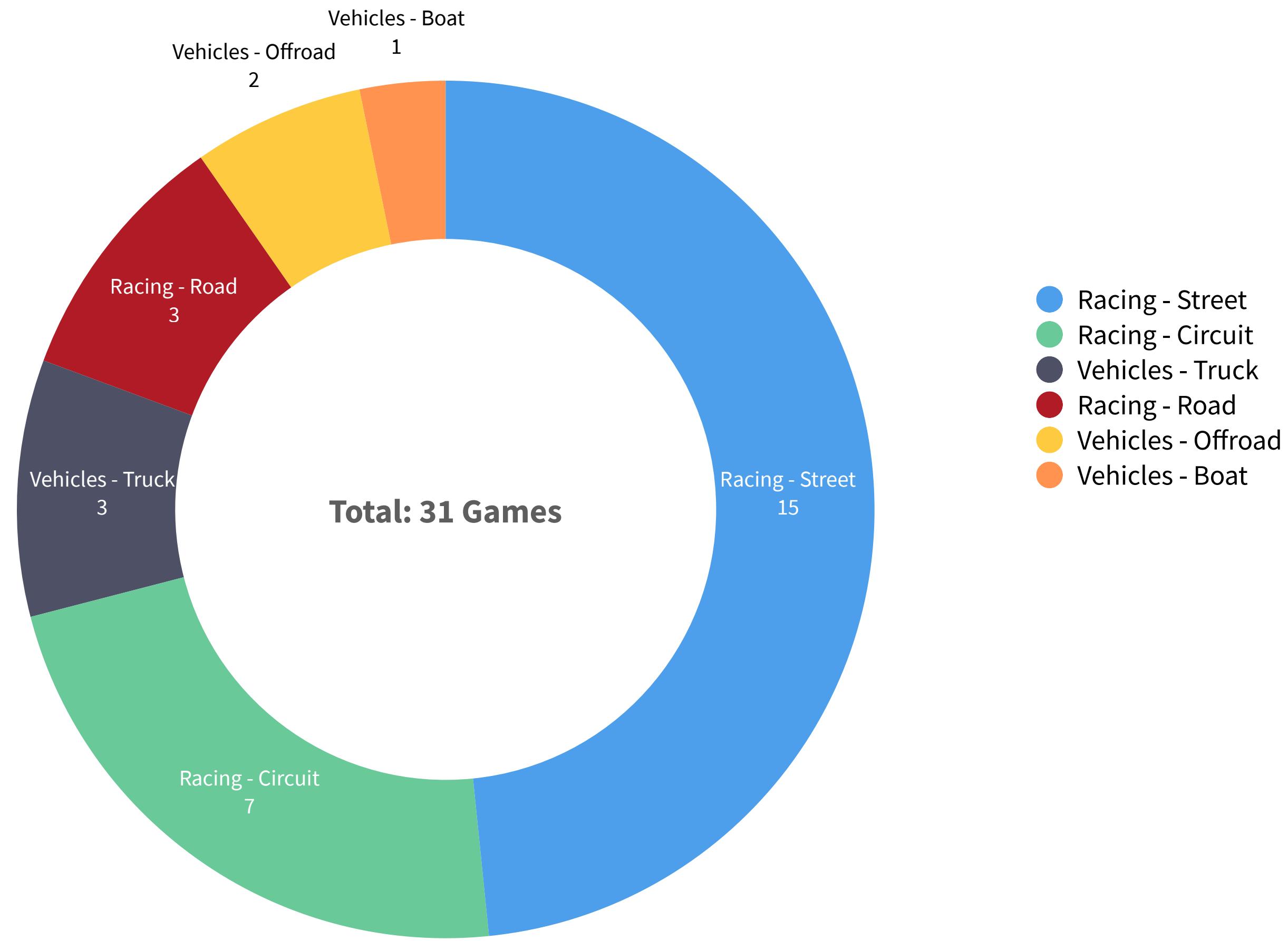
# A Closer Look at Drag Racing



# Street and Circuit Drag Racing Titles Are Popular

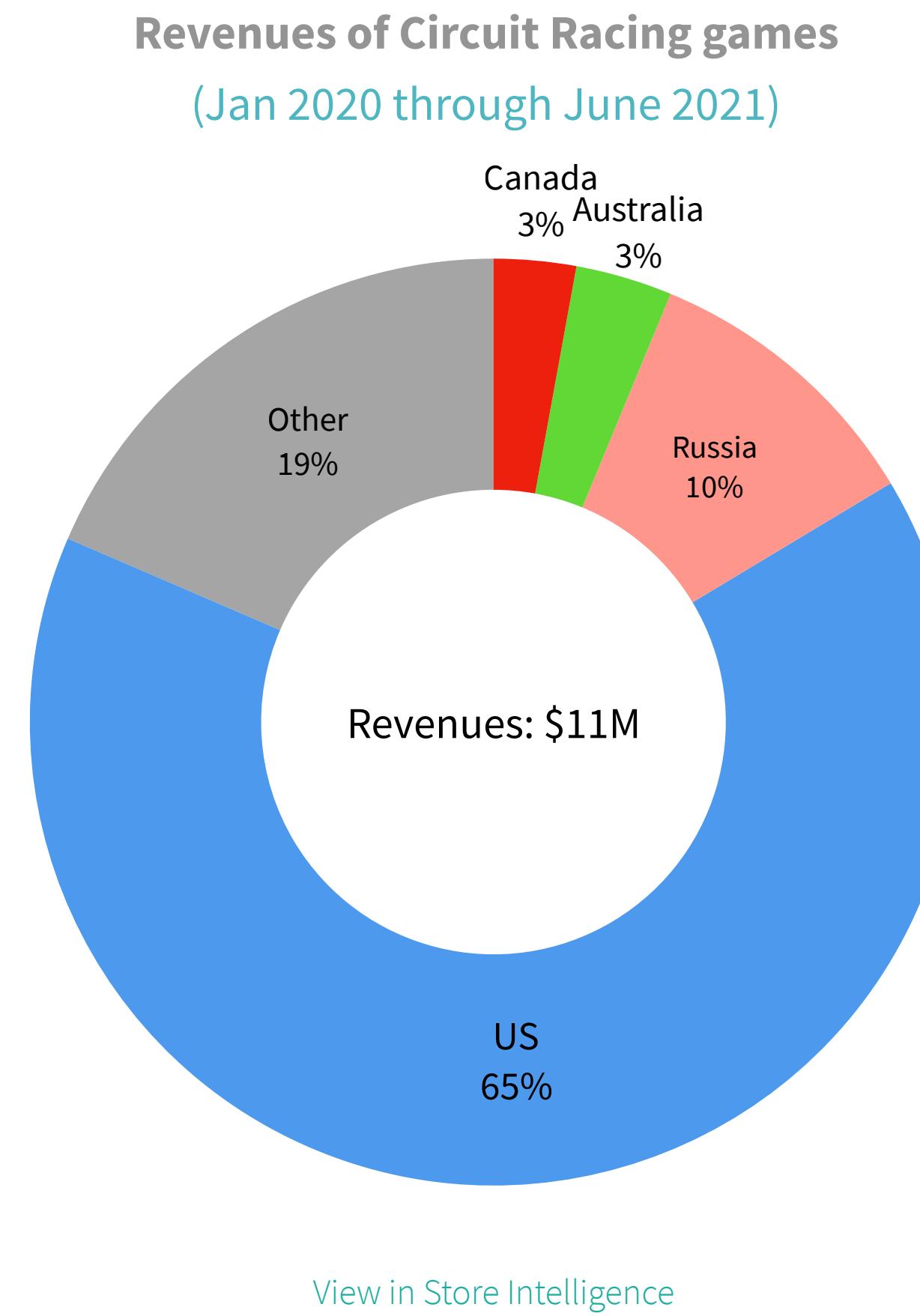
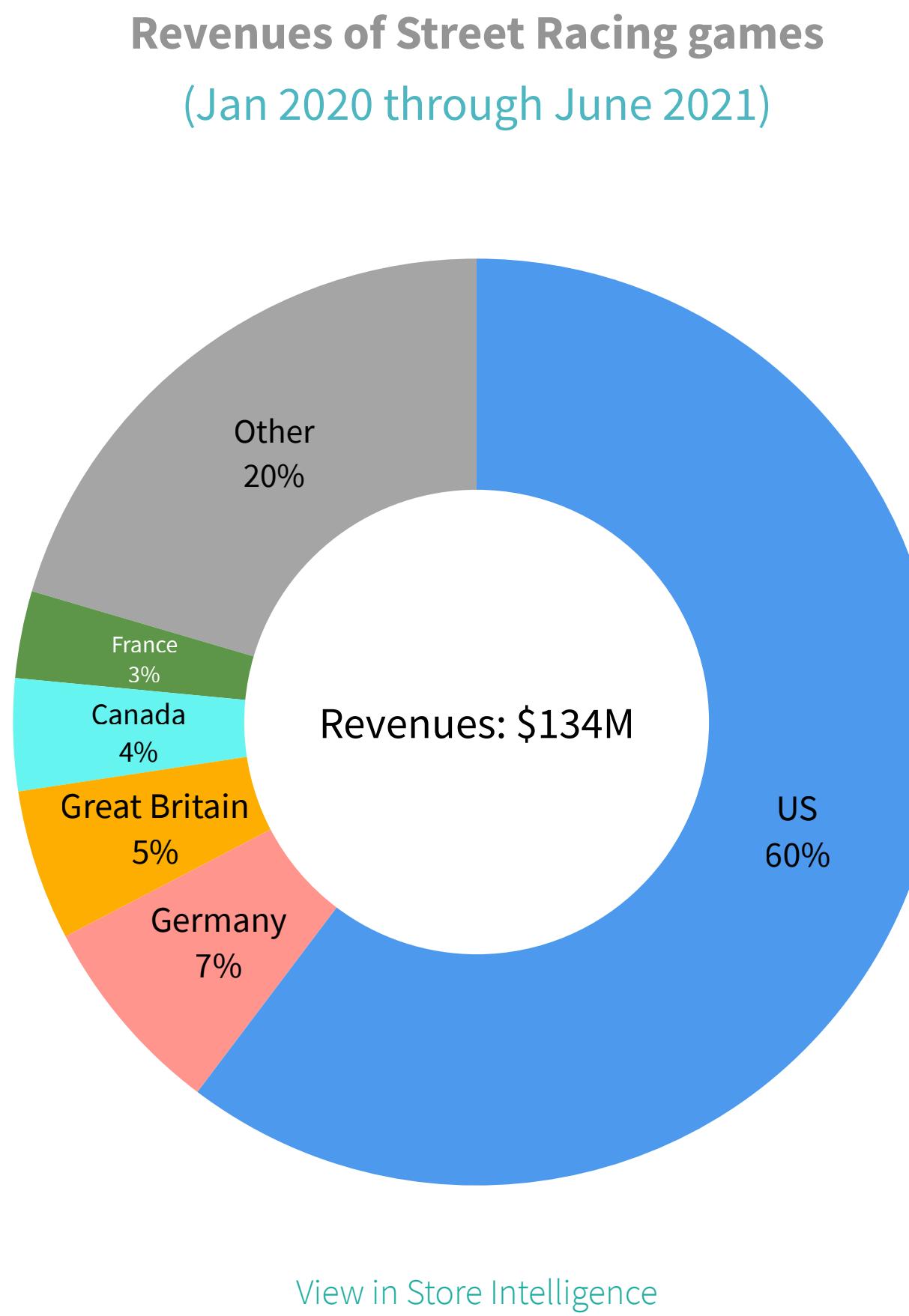
*Breakdown of Drag Racing games by Theme*

[View in Store Intelligence](#)



# US Is the Top-Grossing Market for Drag Racing Games

*Country Breakdown for top 2 Drag Racing themes (Road and Street) by revenues*



US is the highest-grossing market for both of the top Drag Racing themes (Street and Circuit) capturing over 60% of theme-level revenues over the last 18 months

The top 3 highest-grossing Road games during this period were:

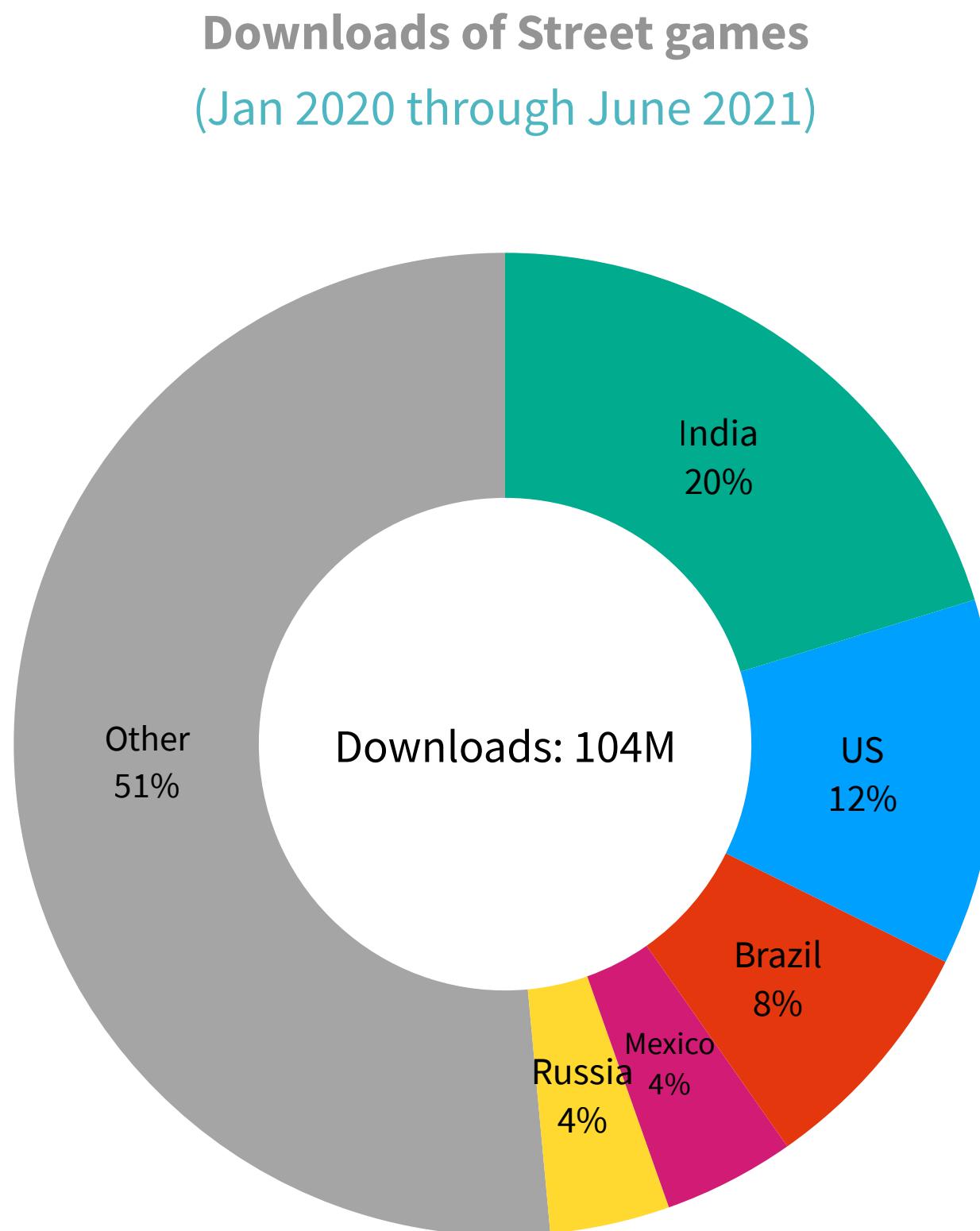
- *CSR 2 Multiplayer Racing Game* (89%)
- *Nitro Nation Drag & Drift Car Racing* (6%)
- *Forza Street: Tap to Race* (6%)

The top 3 highest-grossing Circuit games were:

- *Door Slammers 2 Drag Racing* (33%)
- *Pixel Car Racer* (27%)
- *Drag Racing: Streets* (25%)

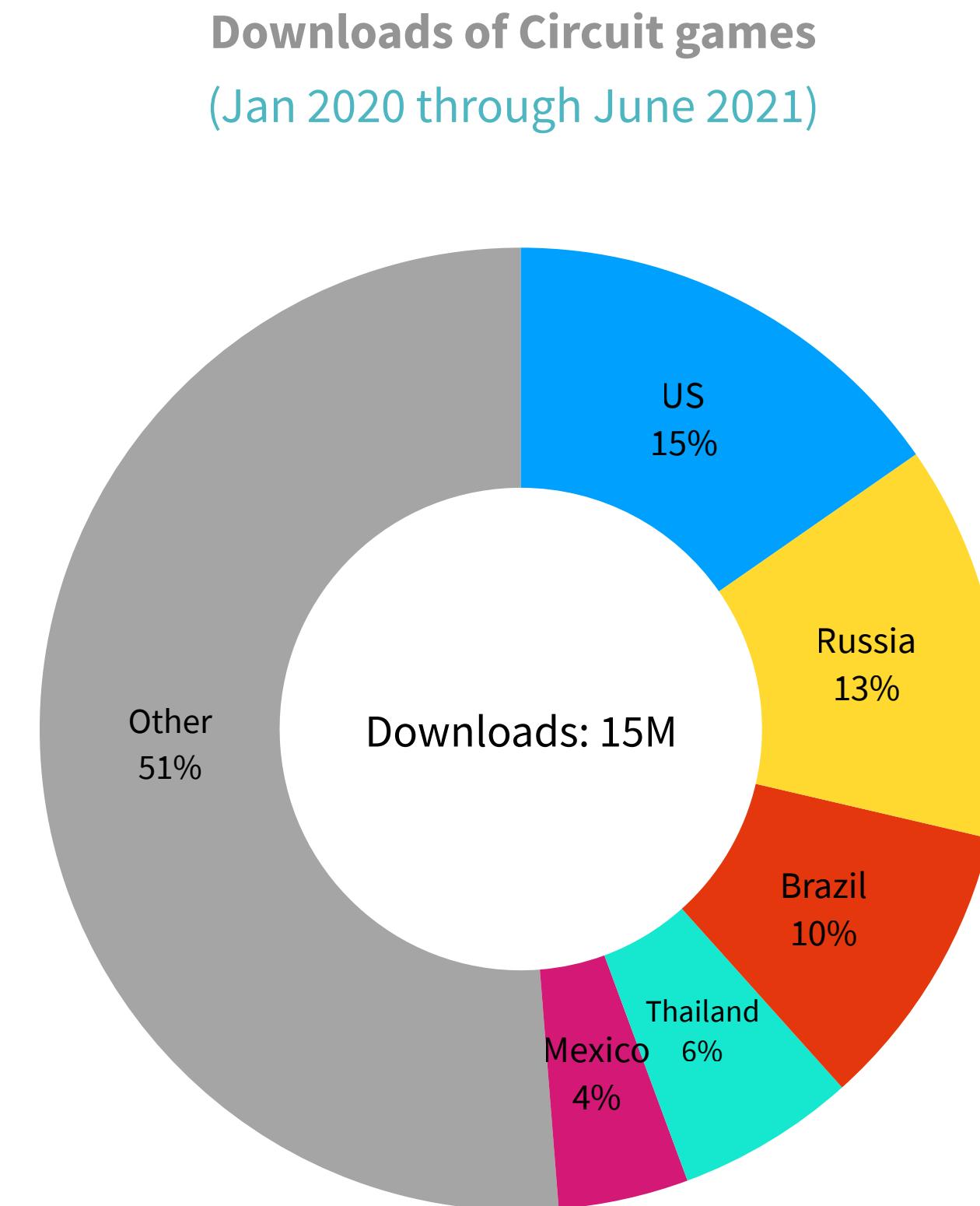
# Car and Motorcycle Games Are Popular in India

*Country Breakdown for top 2 Drag Racing themes (Street and Circuit) by downloads*



[View in Store Intelligence](#)

Drag Racing



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Street and Road Racing games are most downloaded in India, Brazil, and US, but aside from India's 23% download share of street games, no one market accounts for more than 10% of worldwide downloads

The top 3 most downloaded Street games during this period were:

- *Crazy Car Traffic Racing Games 2020* (32%)
- *CSR 2* (20%)
- *Nitro Nation Drag & Drift Car Racing* (13%)

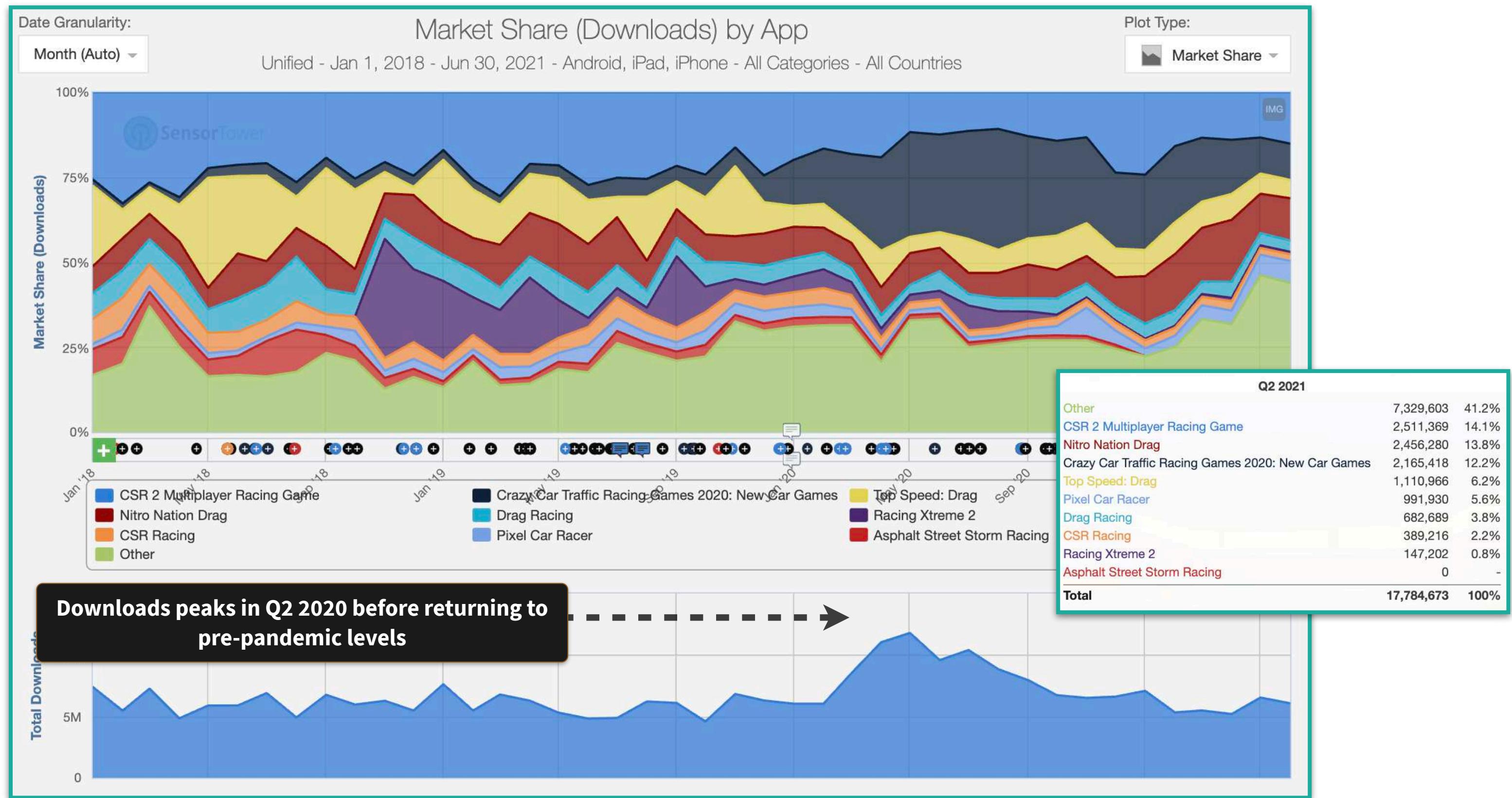
The top 3 most downloaded Circuit games during this period were:

- *Drag Racing* (37%)
- *Pixel Car Racer* (27%)
- *Drag Racing: Streets* (21%)

# Drag Racing Downloads Stable Since 2018

Download share of all Drag Racing games, Jan 2018 through June 2021

[View in Store Intelligence](#)



Total monthly downloads of Drag Racing games have remained relatively stable at 5M-7M per month since Jan 2018. Downloads peaked at 12M during May 2020, amid the first wave of the COVID-19 pandemic

Since Jan 2018, the top 5 games are **CSR 2 Multiplayer Racing Game** (18% downloads share), **Crazy Car Traffic Racing Games 2020** (14%), **Top Speed: Drag & Fast Racing** (11%), **Nitro Nation Drag & Drift Car Racing** (10%), and **Drag Racing** (6%)

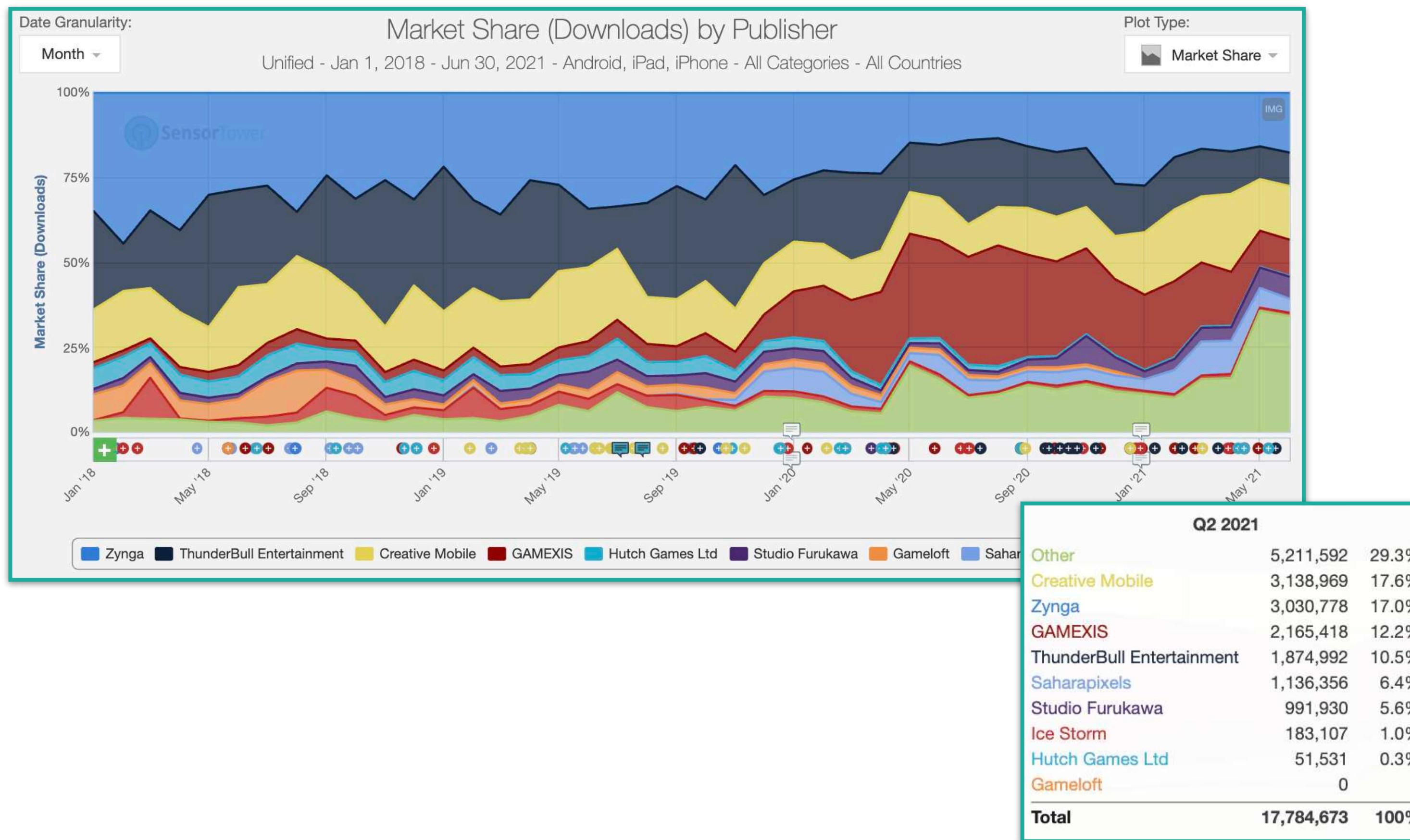
**CSR 2 Multiplayer Racing Game** is the most downloaded title in 1H 2021, with a 14% downloads share in Q2 2021

Android devices account for 75% of total downloads, while iOS takes 25%. By country, India is the No.1 market for Drag Racing games with 15% downloads share, followed by US (14%), Brazil (8%), and Russia (6%)

# Zynga Leads the Way in Downloads Since 2018

Publisher downloads for Drag Racing games, Jan 2018 to June 2021

[View in Store Intelligence](#)



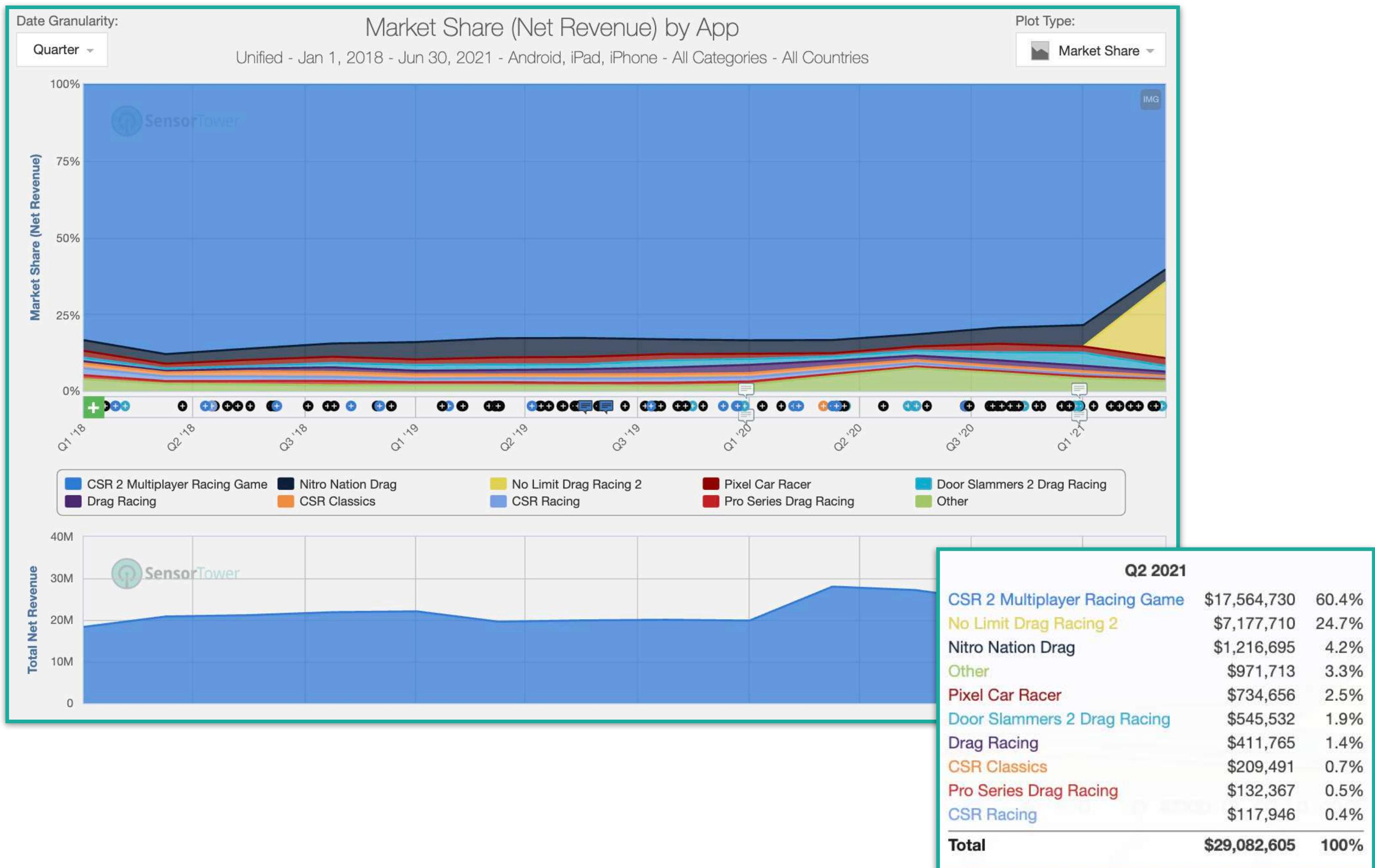
The top 5 Arcade Racing publishers (Zynga, ThunderBull Entertainment, Creative Mobile, Gamexis, Hutch Games) accounted for 80% of total downloads during the period, with Zynga and ThunderBull accounting for 25% and 23%, respectively

Among these 5, Zynga has been the historic market leader, driven by the success of its CSR series (CSR, CSR 2). However, **Drag Racing** and **Nitro Nation Drag** have driven Creative Mobile to the top download share in the most recent quarter (Q2 2021)

# CSR 2 Dominates Drag Racing Revenues

*Revenue share of Drag Racing games, Jan 2018 through June 2021*

[View in Store Intelligence](#)



**CSR 2** accounted for 81% of sub-genre revenues since Jan 2018, and has maintained that share at a quarterly level throughout the period, until the most recent quarter, following the May launch of **No Limit Drag Racing 2**, which quickly captured 25% of quarterly sub-genre revenues

Monthly Drag Racing revenues were stable at around \$5-\$8M/month throughout the period, before spiking to \$12.3M in May 2021 (driven in part by the launch of **No Limit Drag Racing 2** which generated \$4M in revenue that same month)

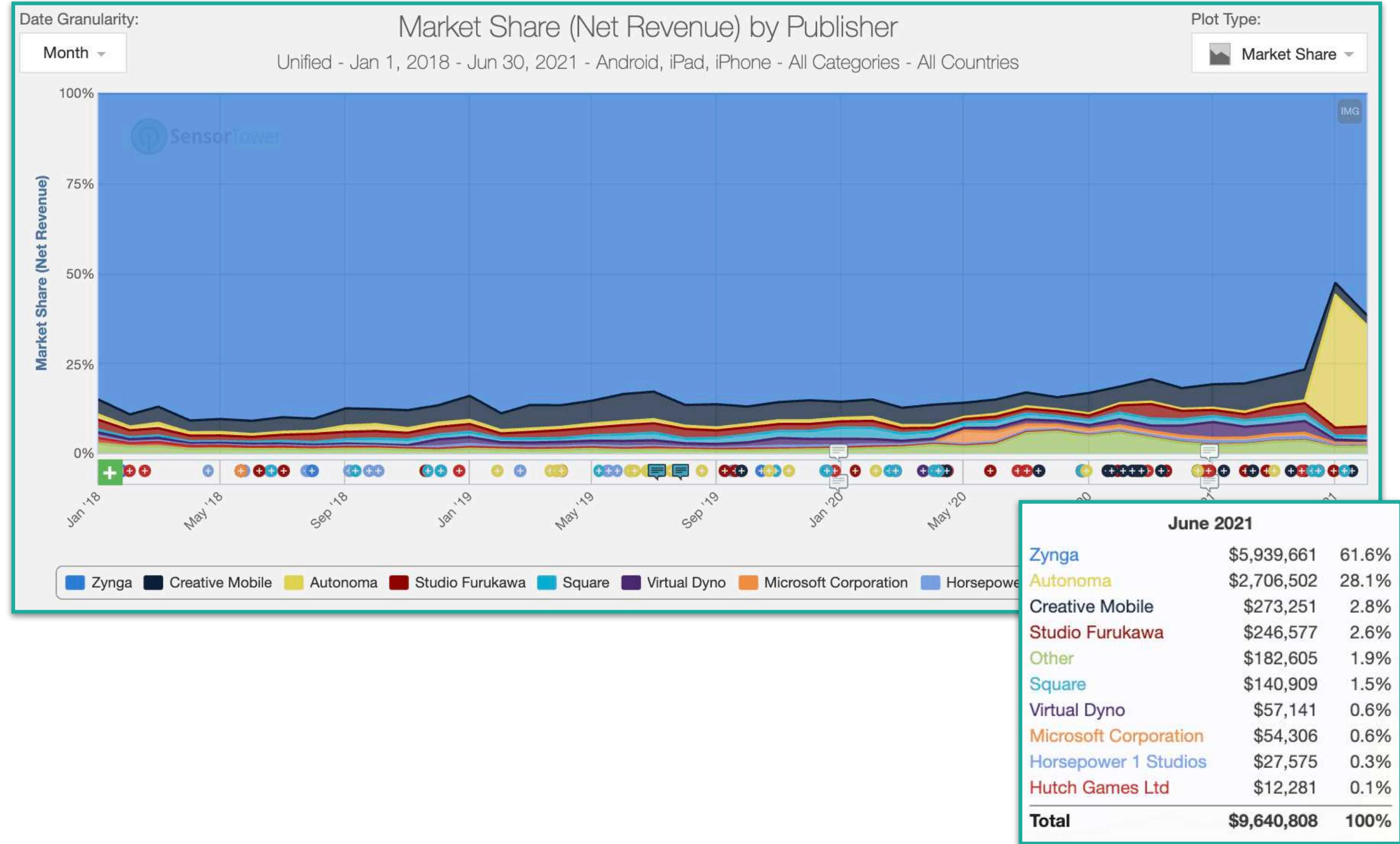
Since Jan 2018, the top 5 revenue earners are **CSR 2** (81% revenue share), **Nitro Nation Drag & Drift Car Racing** (5%), **No Limit Drag Racing 2** (2%), **Pixel Car Racer** (2%), and **Door Slammers 2 Drag Racing** (2%)

iOS devices account for 59% of total revenues. US is the No.1 market with 59% revenue, followed by Germany (6%) and Great Britain (5%)

# Zynga Captured 83% of Drag Racing Revenues

Publisher revenues for Drag Racing games, Jan 2018 through June 2021

[View in Store Intelligence](#)



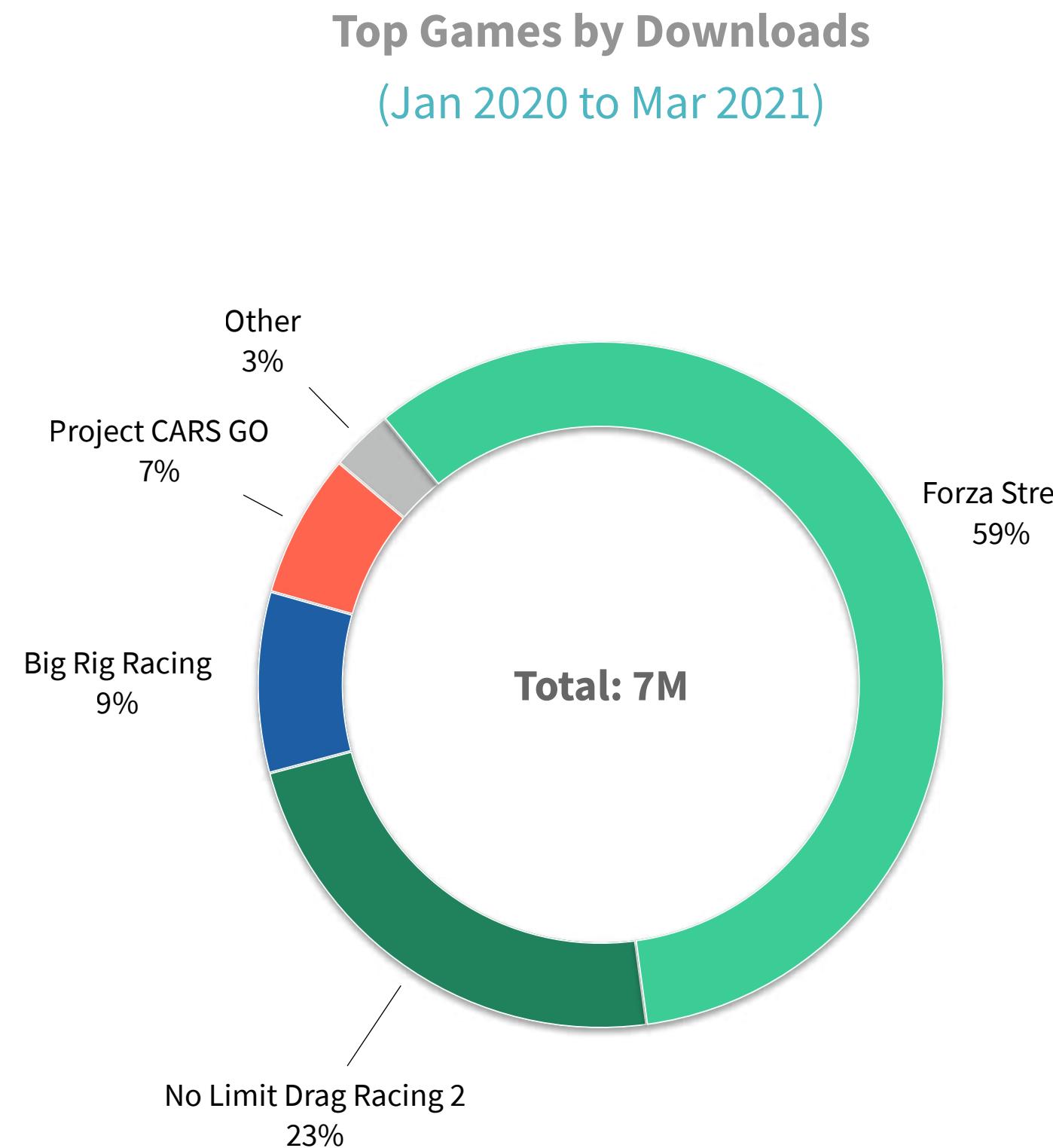
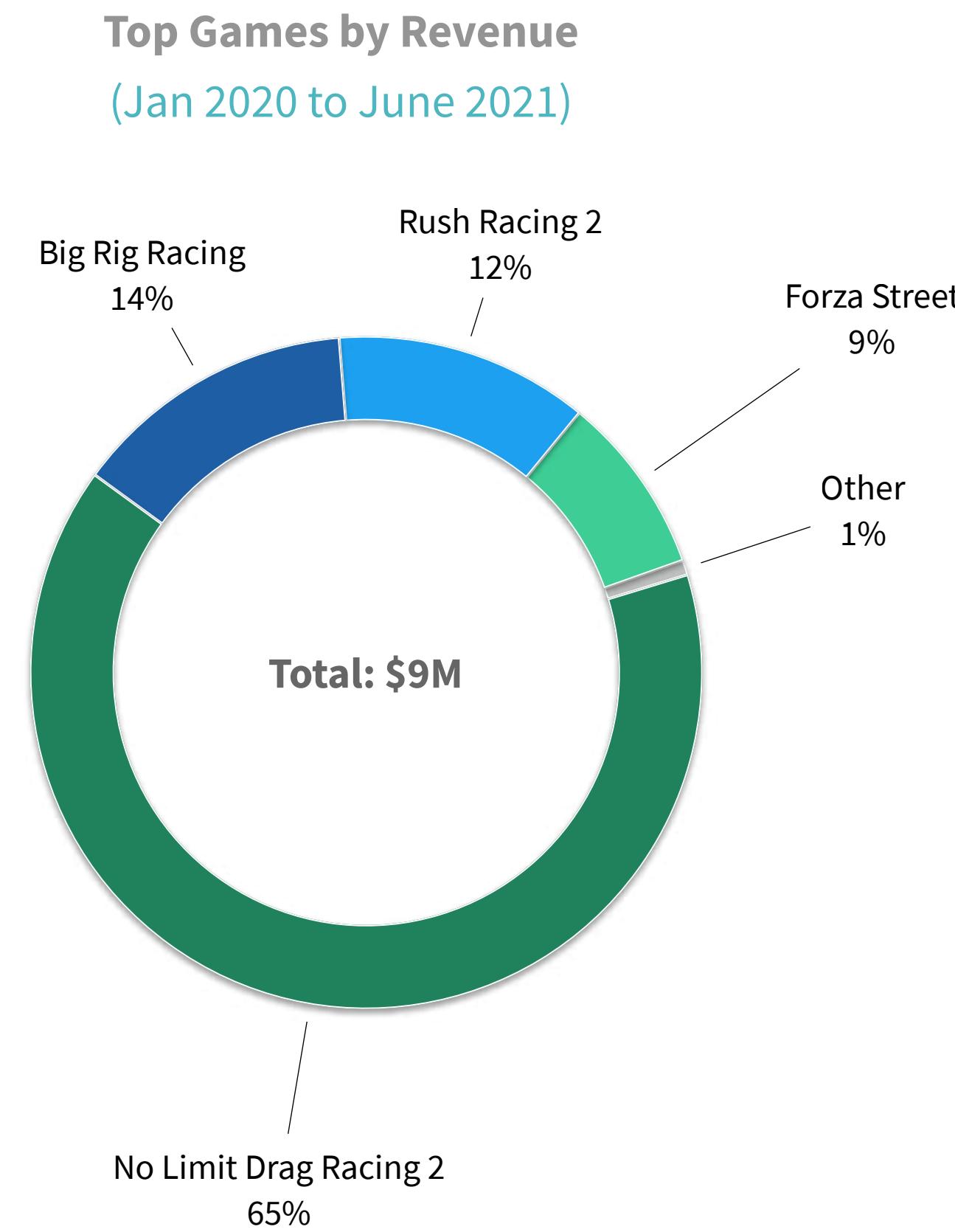
Zynga dominates the category in revenues, accounting for 83% of sub-genre revenues during the period and 62% of sub-genre revenues during the most recent quarter (Q2'2021), driven primarily by [CSR 2](#)

Autonoma's [No Limit Drag Racing 2](#) was released in May 2021 and immediately captured #2 market share. Creative Mobile's [Nitro Nation Drag & Drift Car Racing](#) is another top-performer, accounting for #2 market share overall for the period

# 1 New Title Captured Significant Revenue Share

*Downloads and Revenues of New Drag Racing Games*

[View in Store Intelligence](#)



6 new Arcade Racing games have been released in the last 2 years, half of which had a Street Racing theme

As mentioned, Autonoma's **No Limit Drag Racing 2** was an immediate hit in the category, generating \$6M in revenue in its first 2 months

Microsoft's **Forza Street** has driven the highest numbers of downloads among these new titles (4M since launching in May 2020)

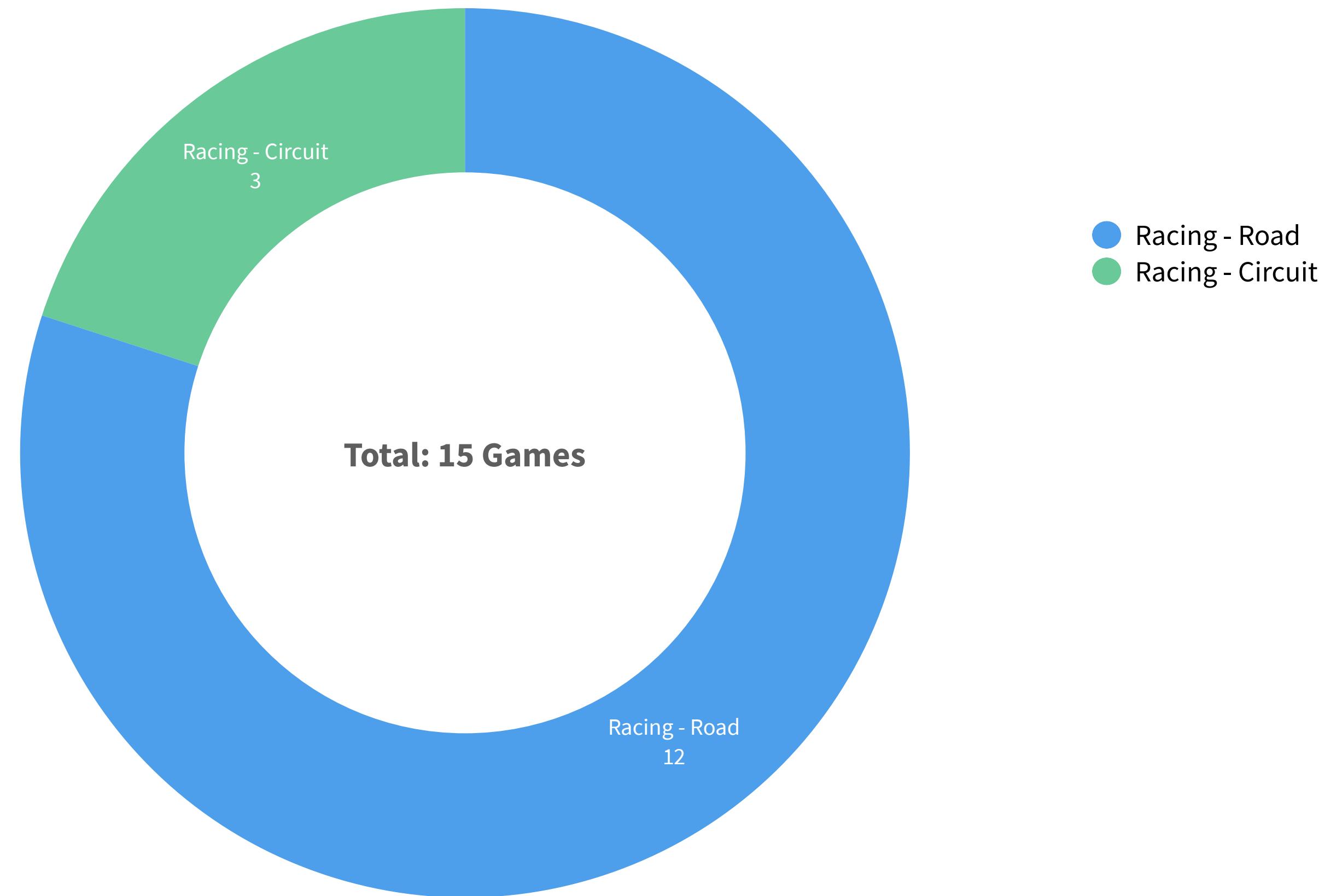
# A Closer Look at Kart Racing



# 3 of 4 Kart Racing Games Have a Road Racing Theme

*Breakdown of Kart Racing games by Theme*

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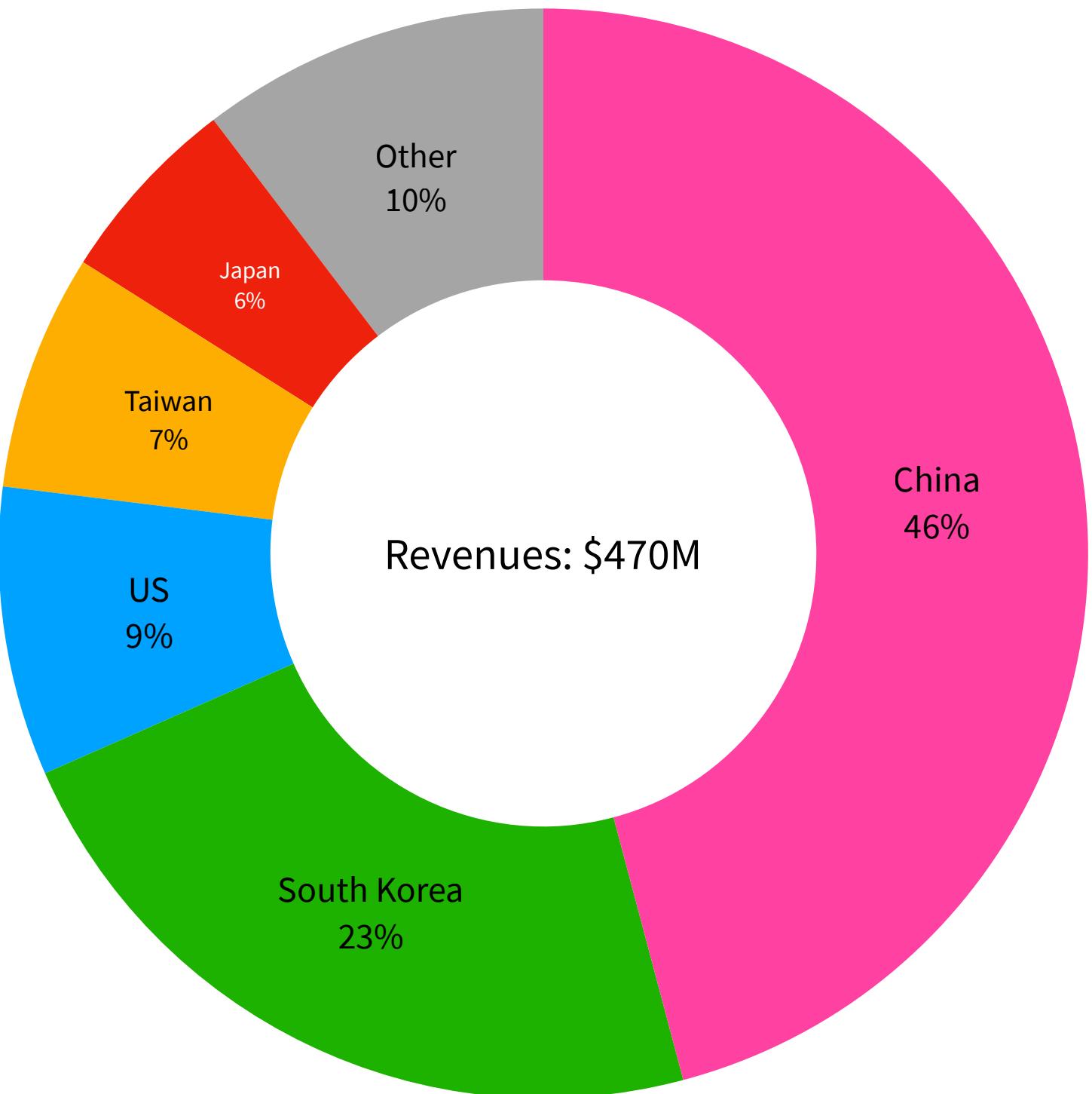
**Road Racing theme is most popular:** 12 of 15 Kart Racing Games have a road racing theme. The rest have a Circuit Racing theme

**Most Arcade Racing games feature 3D Cartoon art style:** 13 games have a 3D Cartoon art style while the remaining 2 have a 3D Anime art style. Cartoon Fantasy is the most popular setting

# Asia Drove Over 80% of Sub-Genre Revenues

*Country Breakdown for Kart Racing Games by revenues, last 18 months*

Revenues of Kart Racing games  
(Jan 2020 through June 2021)



[View in Store Intelligence](#)

China is the highest-grossing market for Kart Racing titles, capturing 46% of revenues in the last 18 months. South Korea, Taiwan, and Japan captured 36% collectively, while the US captured 9%

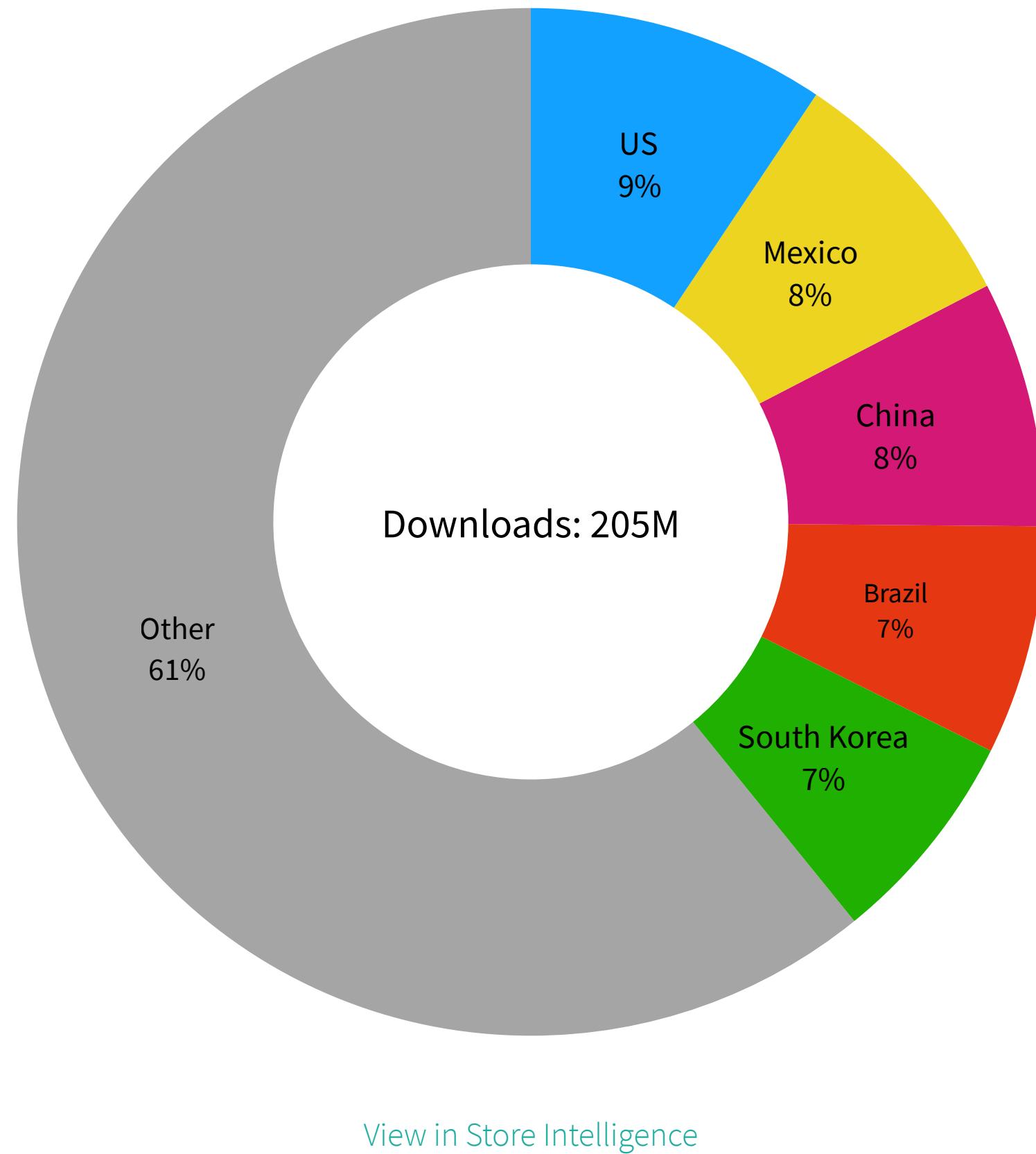
The top 3 highest-grossing Kart Racing games during this period were:

- *Garena Speed Drifters* (38%)
- *KartRider Rush+* (29%)
- *Mario Kart Tour* (21%)

# US Leads Download Ranks for Kart Racing

*Country Breakdown for Kart Racing Games by downloads, last 18 months*

**Downloads of Kart Racing games**  
(Jan 2020 through June 2021)



Kart Racing

Kart Racing games are most downloaded in US, Mexico, China, Brazil, and South Korea, but no one market accounted for more than 10% of worldwide downloads during the last 18 months

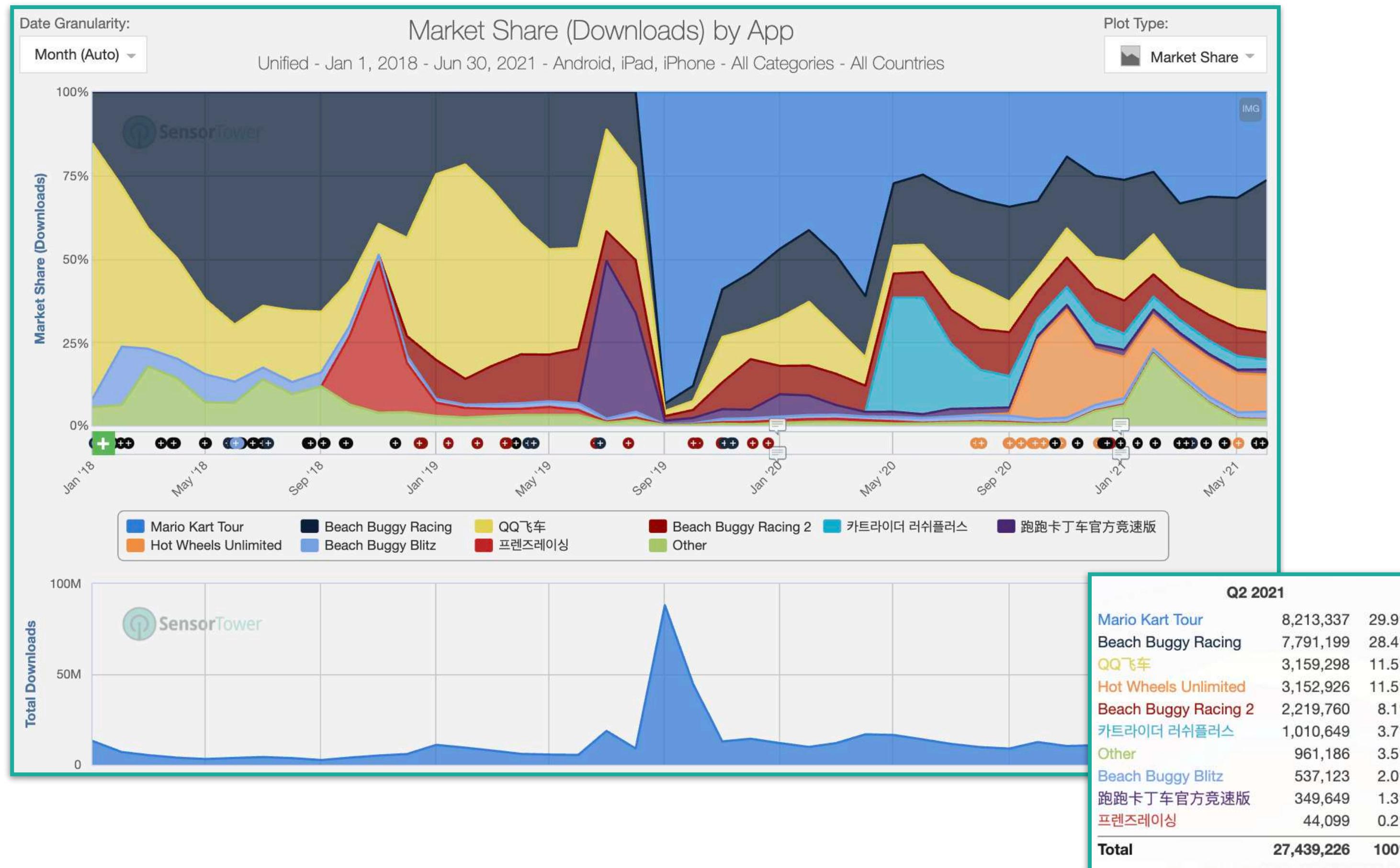
The top 3 most downloaded Kart Racing games during this period were:

- ***Mario Kart Tour*** (34%)
- ***Beach Buggy Racing*** (23%)
- ***Garena Speed Drifters*** (11%)

# Arcade Racing Showing Moderate Downloads Growth

Download share of Kart Racing games, Jan 2018 and June 2021

[View in Store Intelligence](#)



Launch of *Mario Kart Tour* in September 2019 drove massive, 10x download spike in that same month. Following that initial spike, *Mario Kart Tour*'s download share has slowly decreased back down to 26% in the most recent period

Since Jan 2018, the top 5 games are *Mario Kart Tour* (41% downloads share), *Beach Buggy Racing* (20%), *Garena Speed Drifters* (16%), *Beach Buggy Racing 2* (7%), and *KartRider Rush+* (4%)

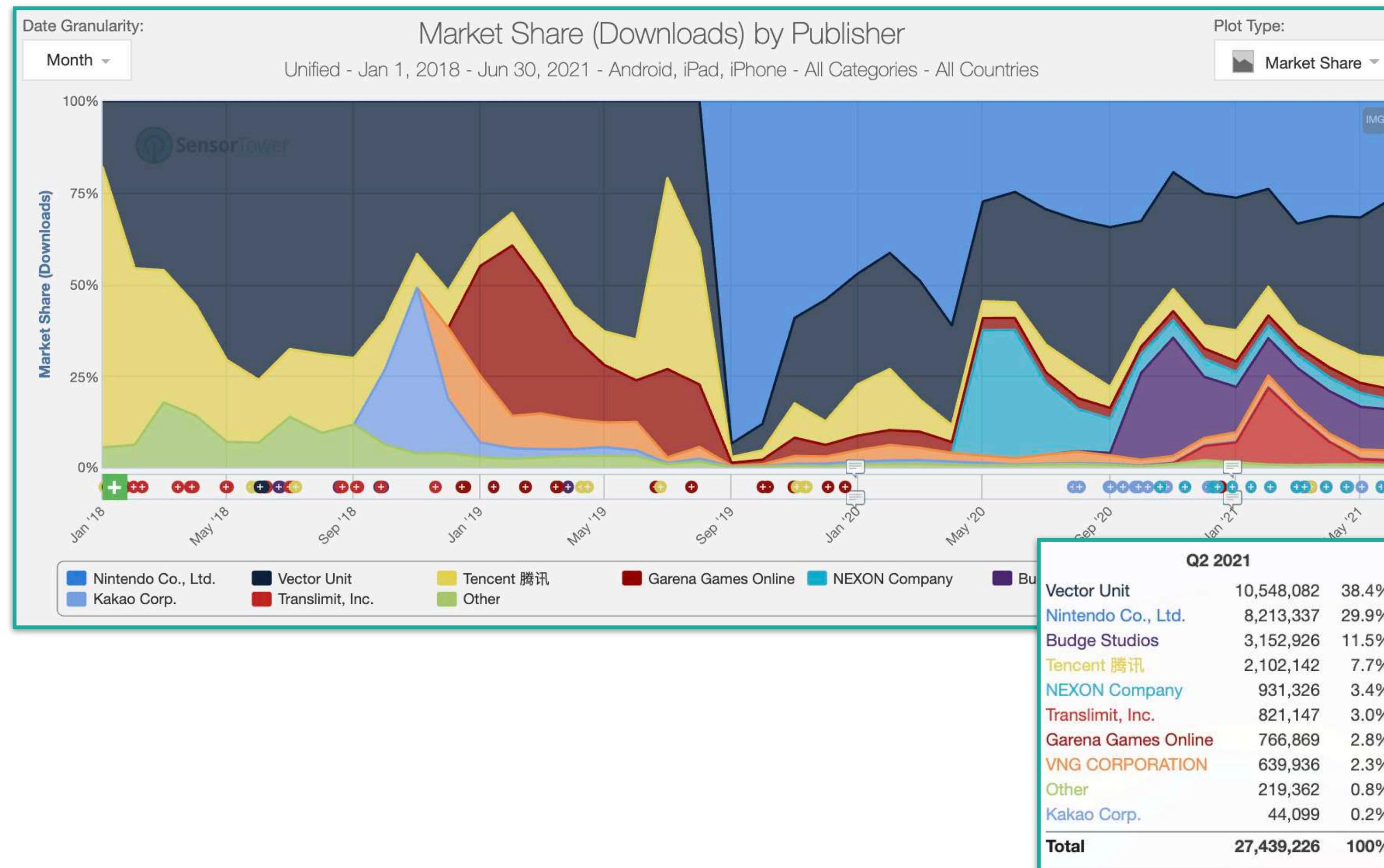
*Mario Kart Tour* is the most downloaded title in 1H 2021, with a 30% downloads share in Q2 2021

Android devices account for 64% of total downloads, while iOS takes 36%

# Nintendo Leads Kart Racing Publishers in Downloads

Publisher downloads for Kart Racing games, Jan 2018 to June 2021

[View in Store Intelligence](#)



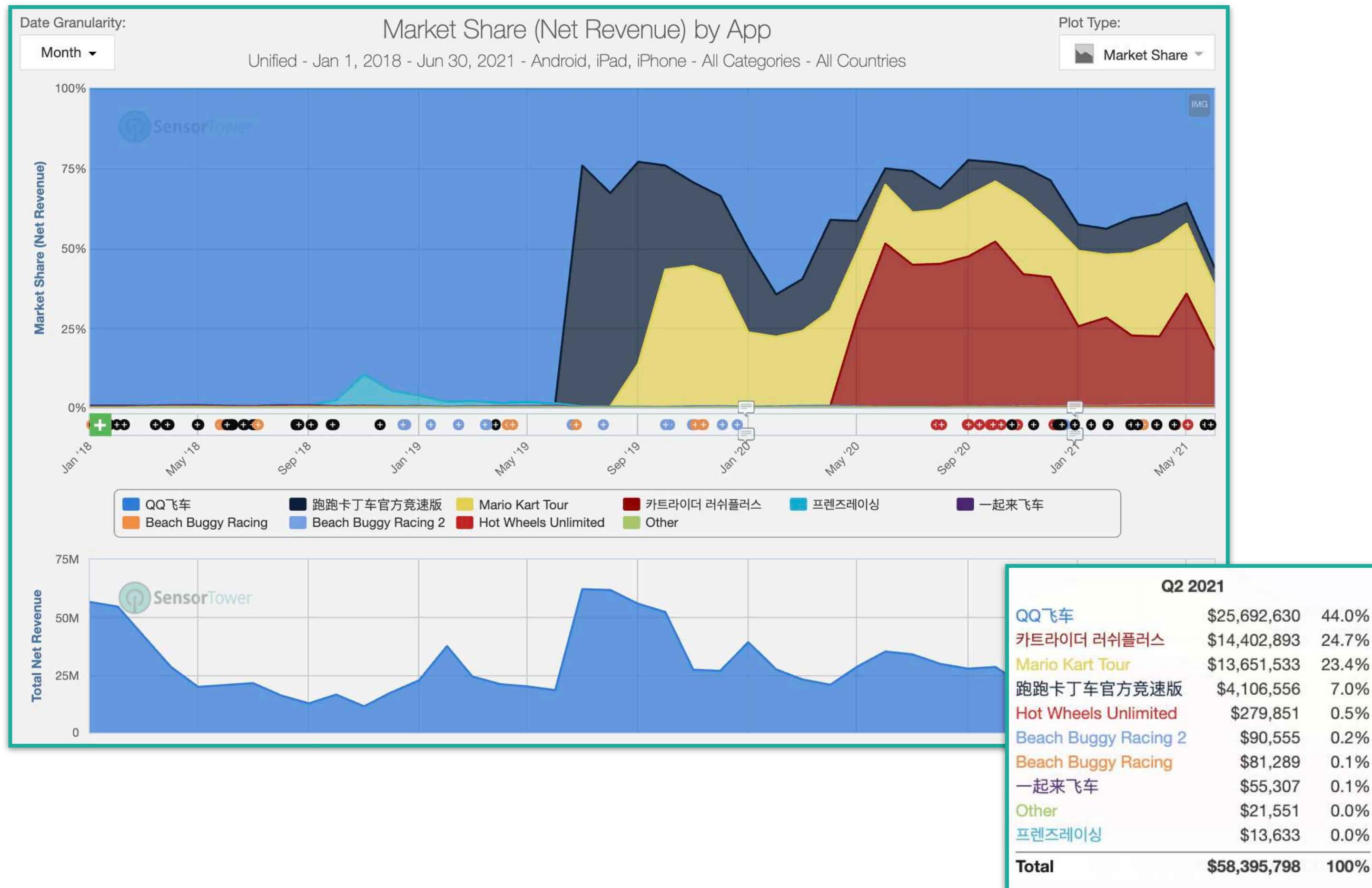
The top 5 Arcade Racing publishers (Nintendo, Vector Unit, Tencent, Garena Games Online, NEXON) accounted for 91% of total downloads during the period, the top 2 alone accounting for nearly 70% (Nintendo and Vector Unit)

Until Nintendo launched *Mario Kart Tour* in September 2019, Vector Unit dominated the category with its Beach Buggy Series (*Beach Buggy Blitz*, *Beach Buggy Racing*, *Beach Buggy Racing 2*). Vector Unit recaptured the #1 market share position in Q3 2020 and has maintained that position through the most recent quarter

# Kart Racing Revenues Peaked in July 2019

Revenue share of Kart Racing Games, Jan 2018 through June 2021

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Monthly Kart Racing revenues average around \$20M per month, with the exception of Q1 2018 and Q3 2019 spikes

Revenues peaked in July 2019 with the launch of *Crazy Racing KartRider*

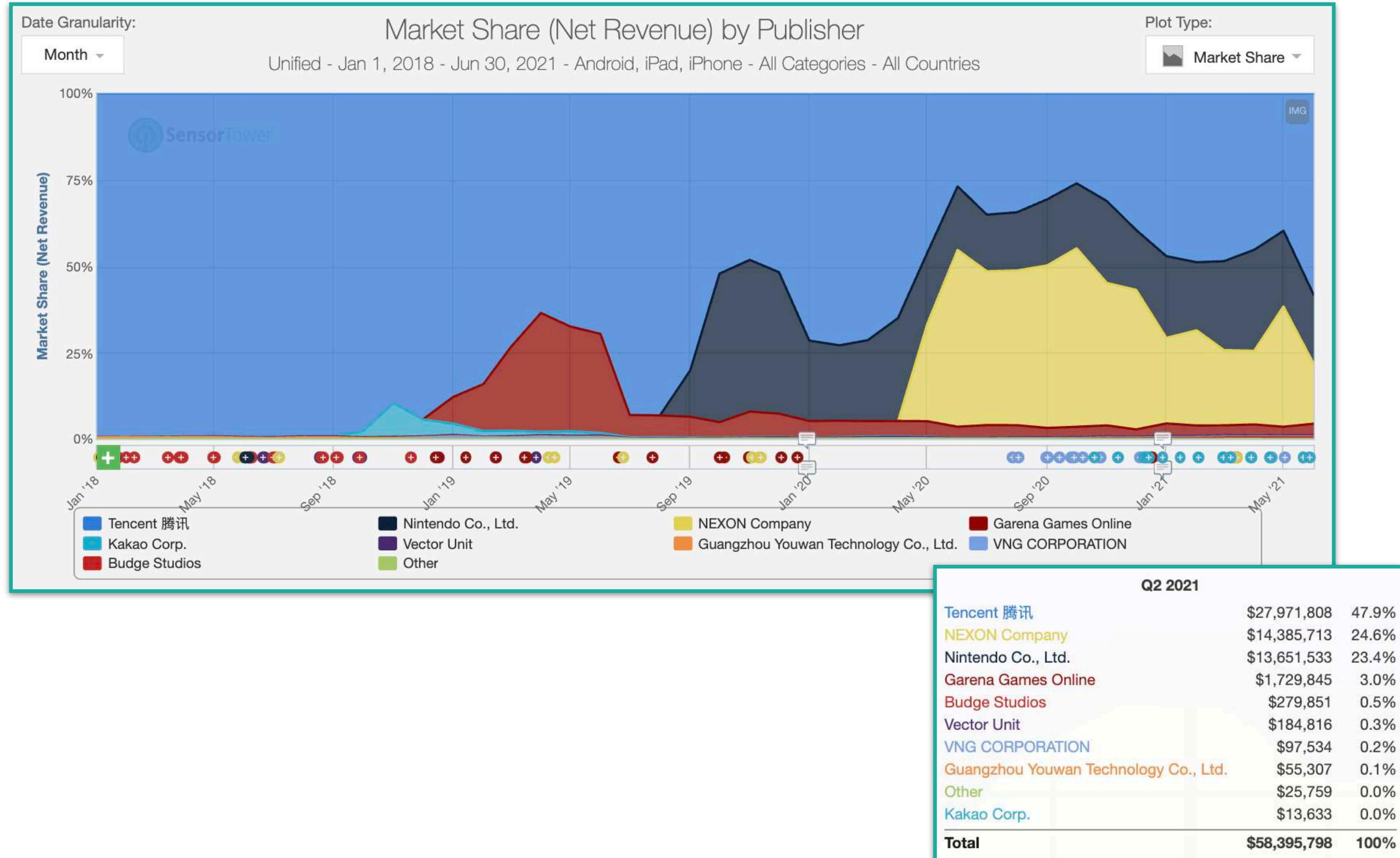
Since Jan 2018, the top 4 revenue earners are *Garena Speed Drifters* (58% revenue share), *Crazy Racing KartRider* (17%), *Mario Kart Tour* (13%), and *KartRider Rush+* (11%)

iOS devices account for 87% of total revenues. China is the No.1 market with 70% revenue, followed by South Korea (9%) and Taiwan (6%)

# Tencent Captures Over 50% Revenue Share

Publisher revenues for Kart Racing games, Jan 2018 through June 2021

[View in Store Intelligence](#)



The top 5 highest-grossing publishers (Tencent, Nintendo, NEXON, Garena Games Online, Kakao) in this sub-genre account for >99% of total downloads

Among these 5, Tencent is the historic market leader with 70% revenue share from Jan 2018 to Mar 2021. After ceding the #1 position to NEXON for a 6-month period beginning in June 2020, Tencent recaptured the top monthly revenue share in January 2021 and has held it ever since

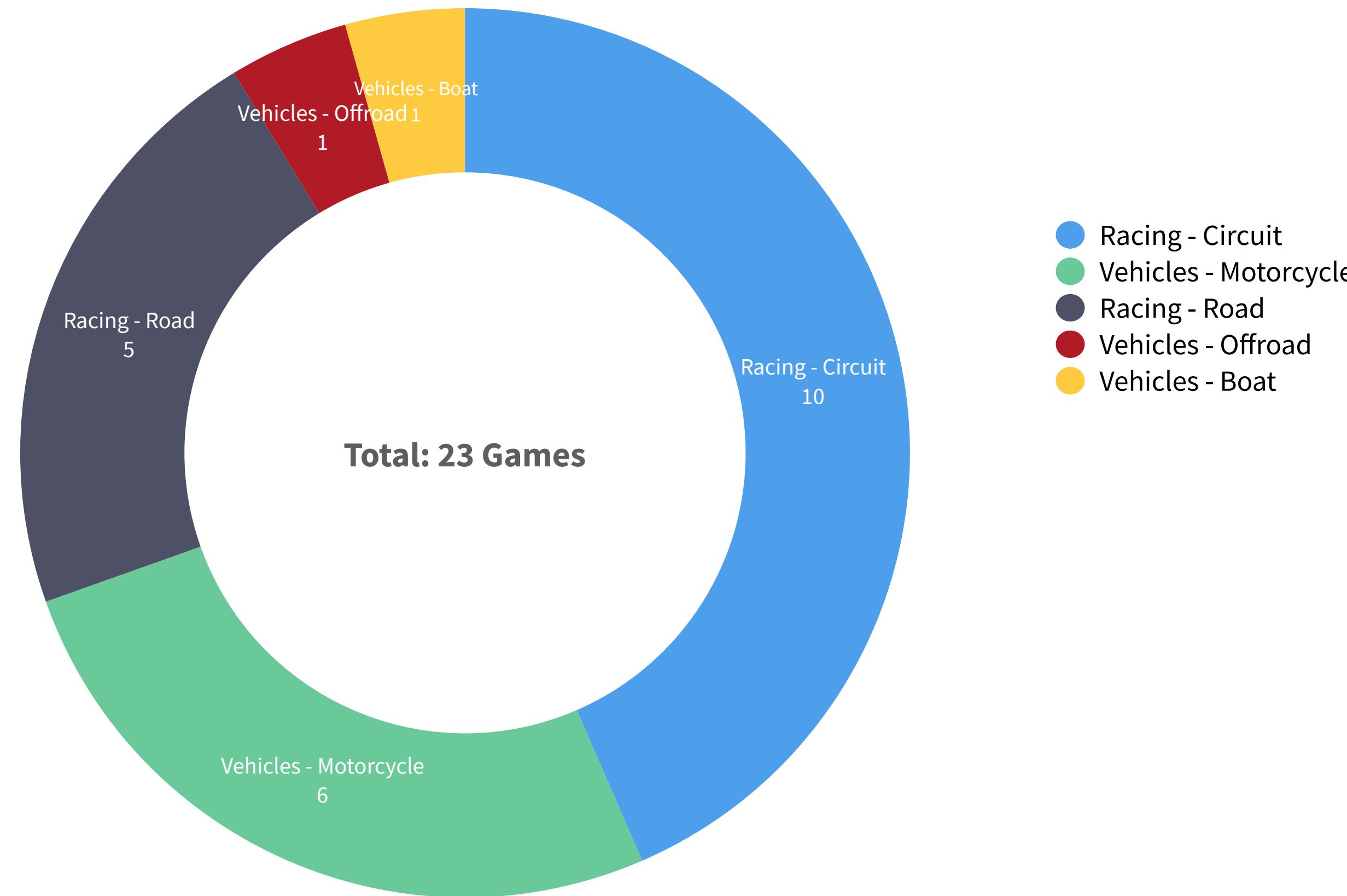
# A Closer Look at Racing Simulators



# Road, Street, and Circuit Arcade Games Are Popular

*Breakdown of top Arcade Racing games by themes*

[View in Store Intelligence](#)



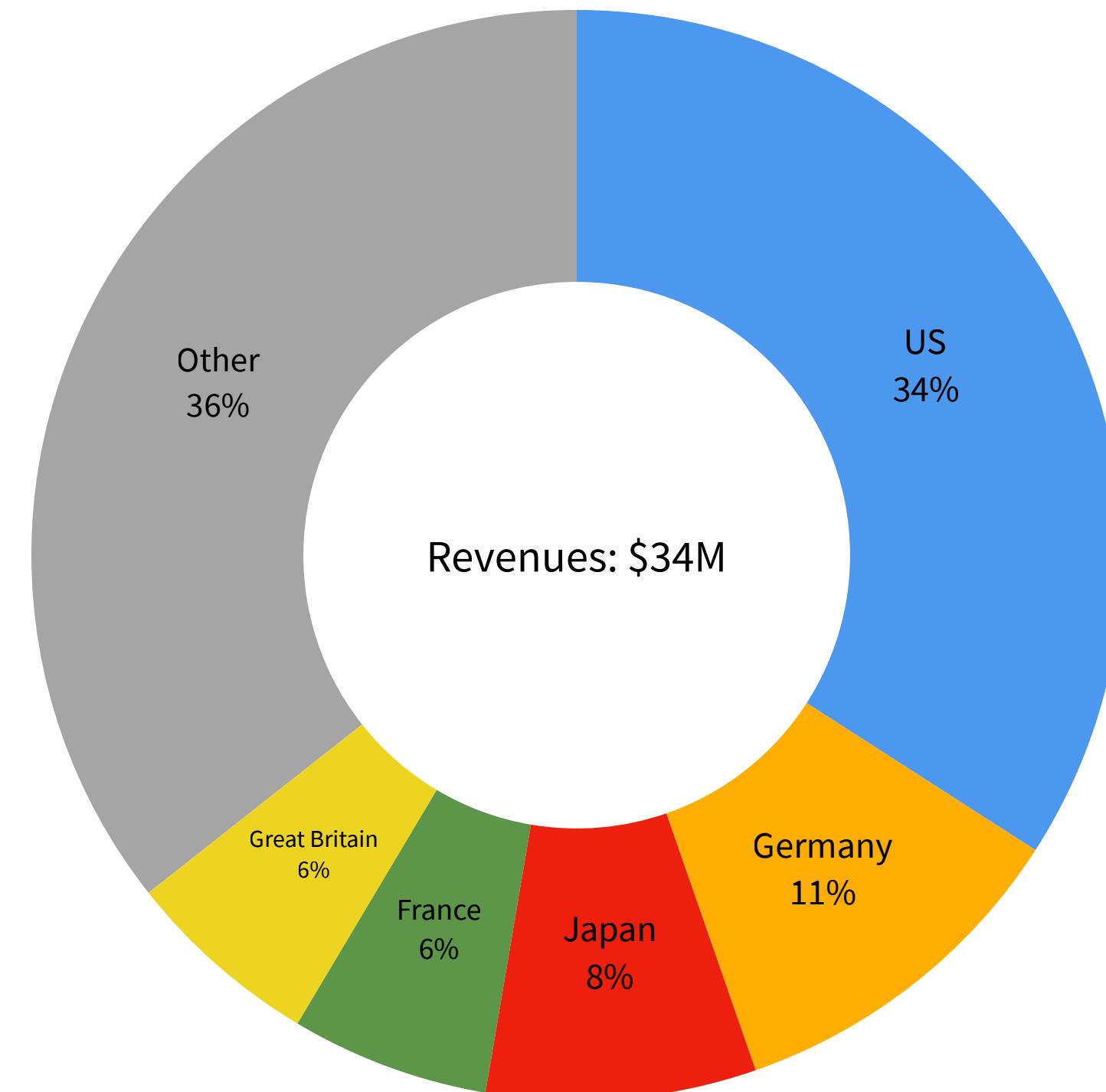
Circuit Racing is the most popular theme among Racing Simulators, with 10 of the 23 existing Racing Simulators having that theme. Motorcycles are also popular, with 6 of 23 titles featuring Motorcycles

All 23 Racing Simulators feature a 3D Realistic art style.

# US Is the Top Market for Racing Simulators

*Country Breakdown for Racing Simulators by revenues, last 18 months*

Revenues of Racing Simulators games  
(Jan 2020 through June 2021)



[View in Store Intelligence](#)

While US, China and Japan are the highest-grossing countries across these two themes, other Asian countries like South Korea, Taiwan and Japan also rank high in overall revenue share for these games, as do European countries like Germany, Great Britain, and France

The top 3 revenue-generating Road games during this period were:

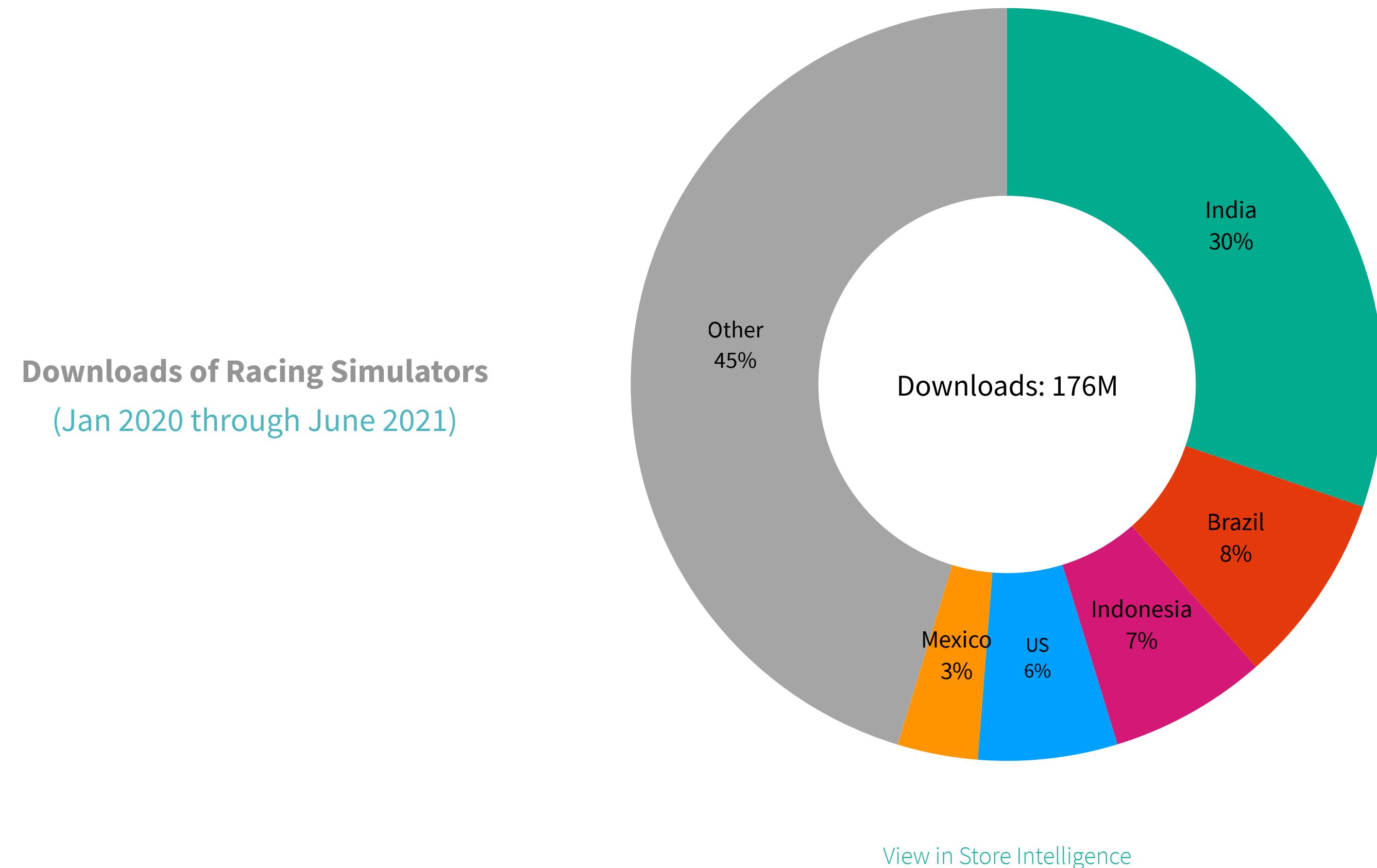
- *Top Drives - Car Cards Racing* (35%)
- *Drift Spirits* (27%)
- *Rebel Racing* (14%)

The top 3 revenue-generating Street games were:

- *Need for Speed - No Limits* (49%)
- *Asphalt 9: Legends* (38%)
- *Asphalt 8 - Car Racing* (9%)

# India Accounts for the Most Racing Simulator Downloads

*Country Breakdown for Racing Simulators by downloads, last 18 months*



In the last 18 months, 30% of Racing Simulator downloads came from India. Brazil, Indonesia, US, and Mexico rounded out the rest of the top 5, each accounting for less than 10% of downloads

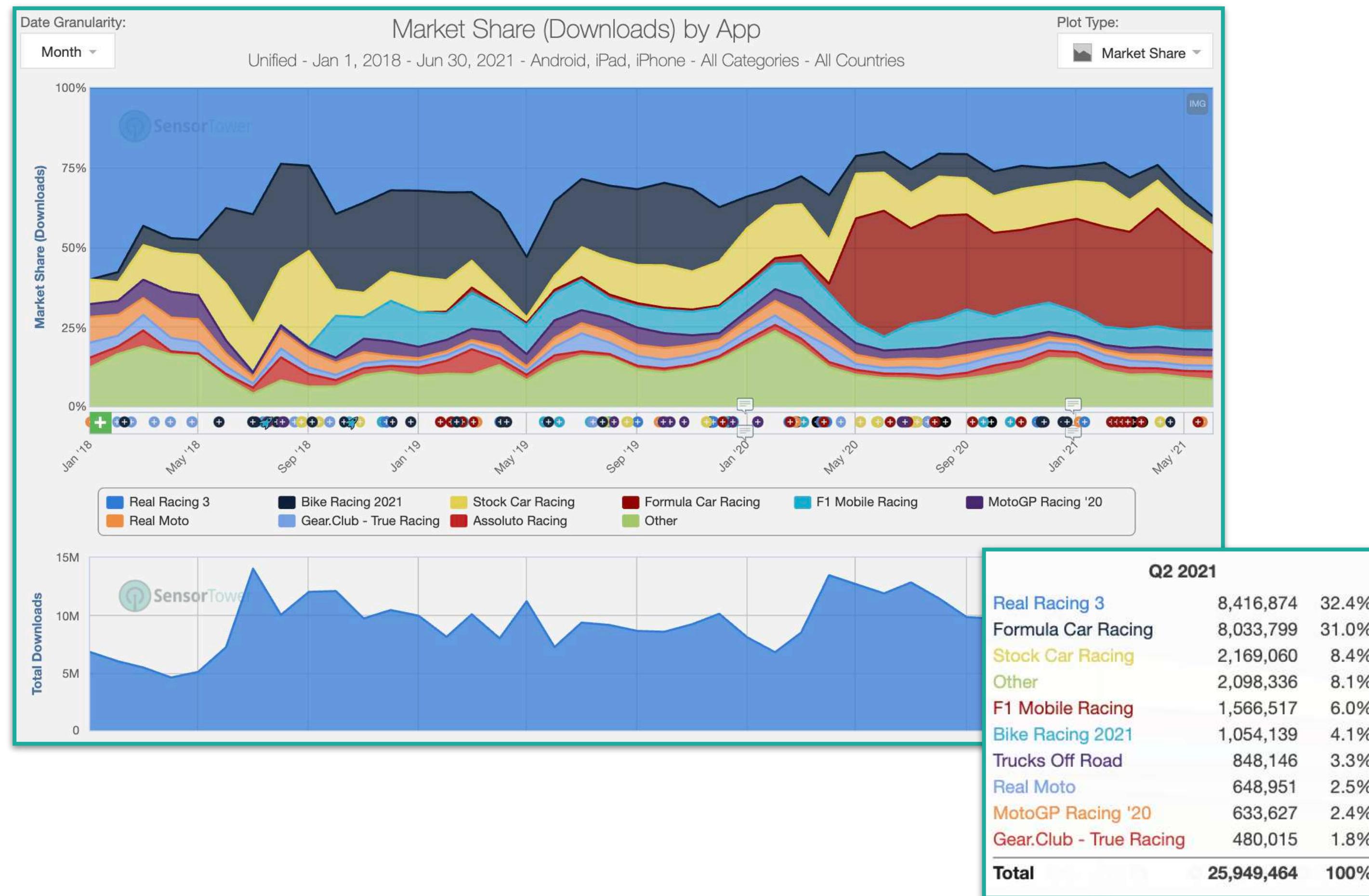
The top 3 most downloaded Racing Simulators during this period were:

- *Real Racing 3* (25%)
- *Formula Car Racing: Car Games* (15%)
- *Stock Car Racing* (14%)

# Monthly Racing Simulator Downloads Vary

Download share of Racing Simulators, Jan 2018 through June 2021

[View in Store Intelligence](#)



Since 2018, monthly Racing Simulator downloads have totaled 7M-15M

The top 5 games are **Real Racing** (32% downloads share), **Bike Racing 2021** (15%), **Stock Car Racing** (12%), **Formula Car Racing: Car Games** (11%), and **F1 Mobile Racing** (7%)

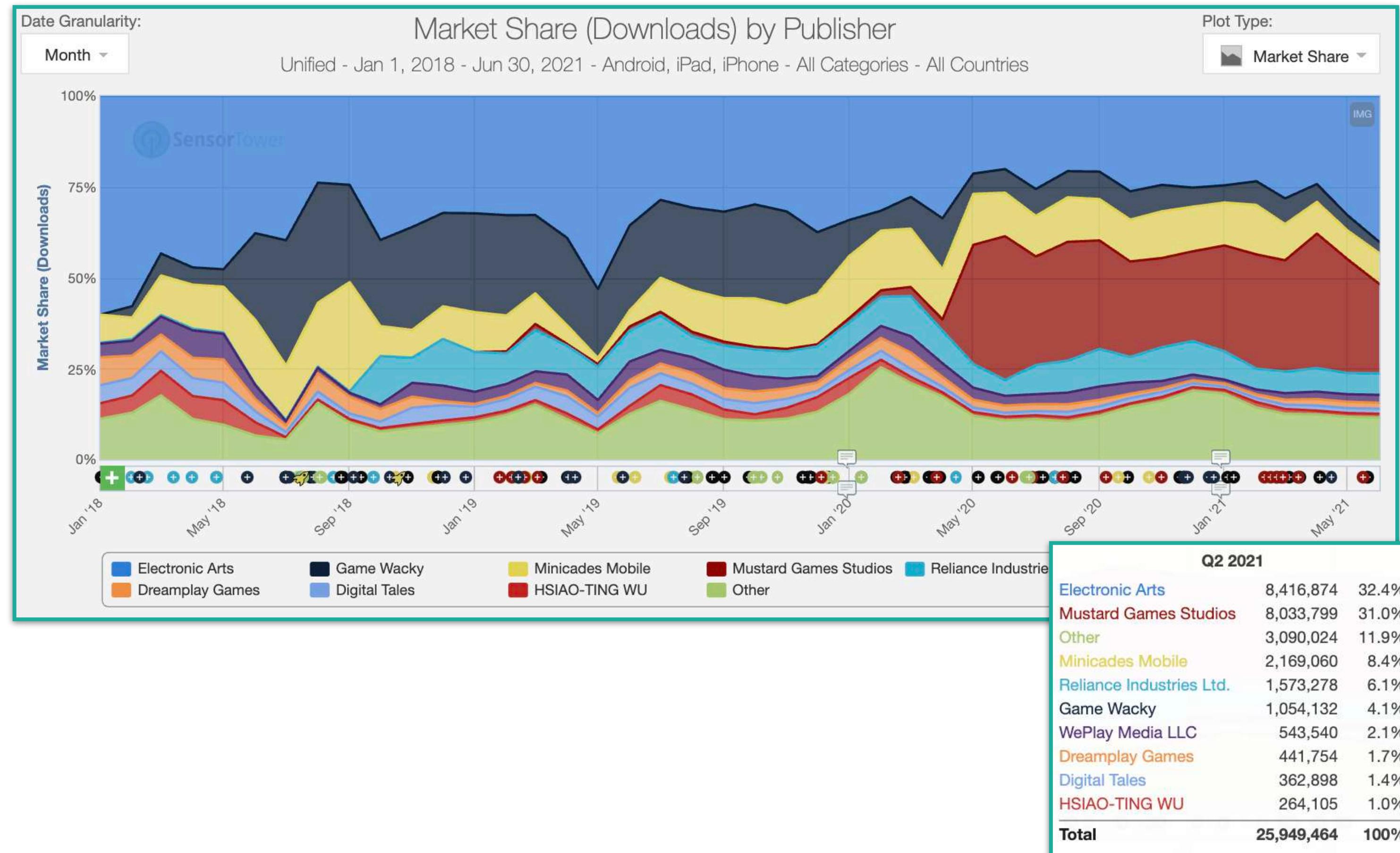
*Real Racing 3* is the most downloaded title in 1H 2021, with a 32% downloads share in Q2 2021

Android devices account for 84% of total downloads, while iOS takes 16%. By country, India is the No.1 market for Racing Simulators with a 26% downloads share, followed by Brazil (9%), Indonesia (7%), and US (6%)

# Electronic Arts Leads Sub-Genre Downloads

Publisher downloads for Racing Simulators, Jan 2018 to June 2021

[View in Store Intelligence](#)



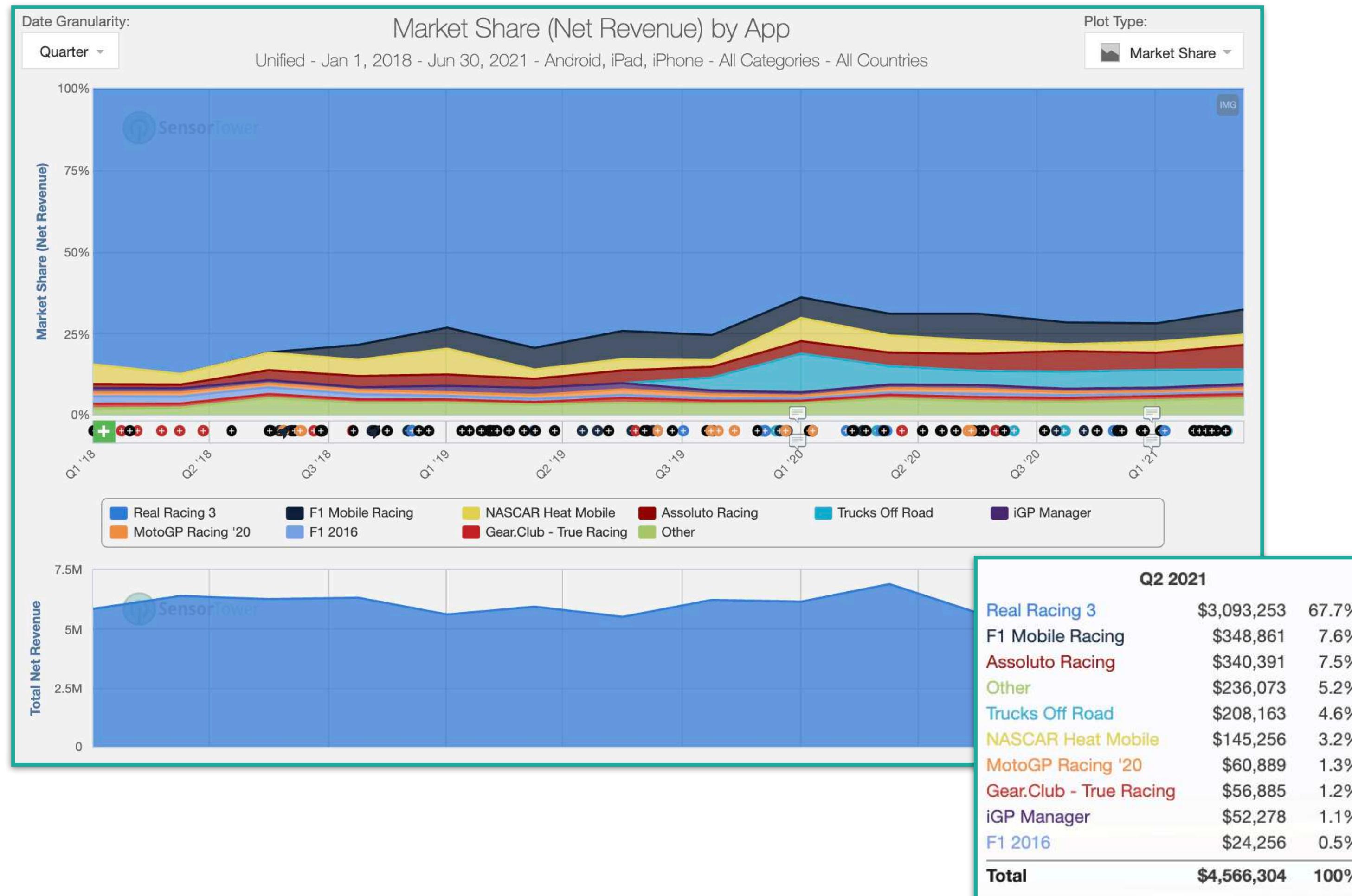
The top 5 Racing Simulator publishers (Electronic Arts, Game Wacky, Minicades Mobile, Mustard Games, Reliance Industries) accounted for 66% of total downloads during the period. Electronic Arts was the clear leader at 32%, with Game Wacky in the #2 spot at 15%

Among these 5, Electronic Arts has been the historic market leader, driven by the success of Real Racing 3. However, Mustard Games' Formula Car Racing captured near-equal downloads share in the most recent quarter (Q2 2021)

# Racing Simulator Revenues Are in Declining

*Revenue share of Racing Simulators, Jan 2018 through June 2021*

[View in Store Intelligence](#)



Total monthly revenue of Racing Simulators has declined slightly since Jan 2018, peaking at \$2.7M in December 2019 before declining by almost 50% to \$1.4M in June 2021

Revenues peaked in December 2019 due in part to the successful launch of *Trucks Off Road* that same month

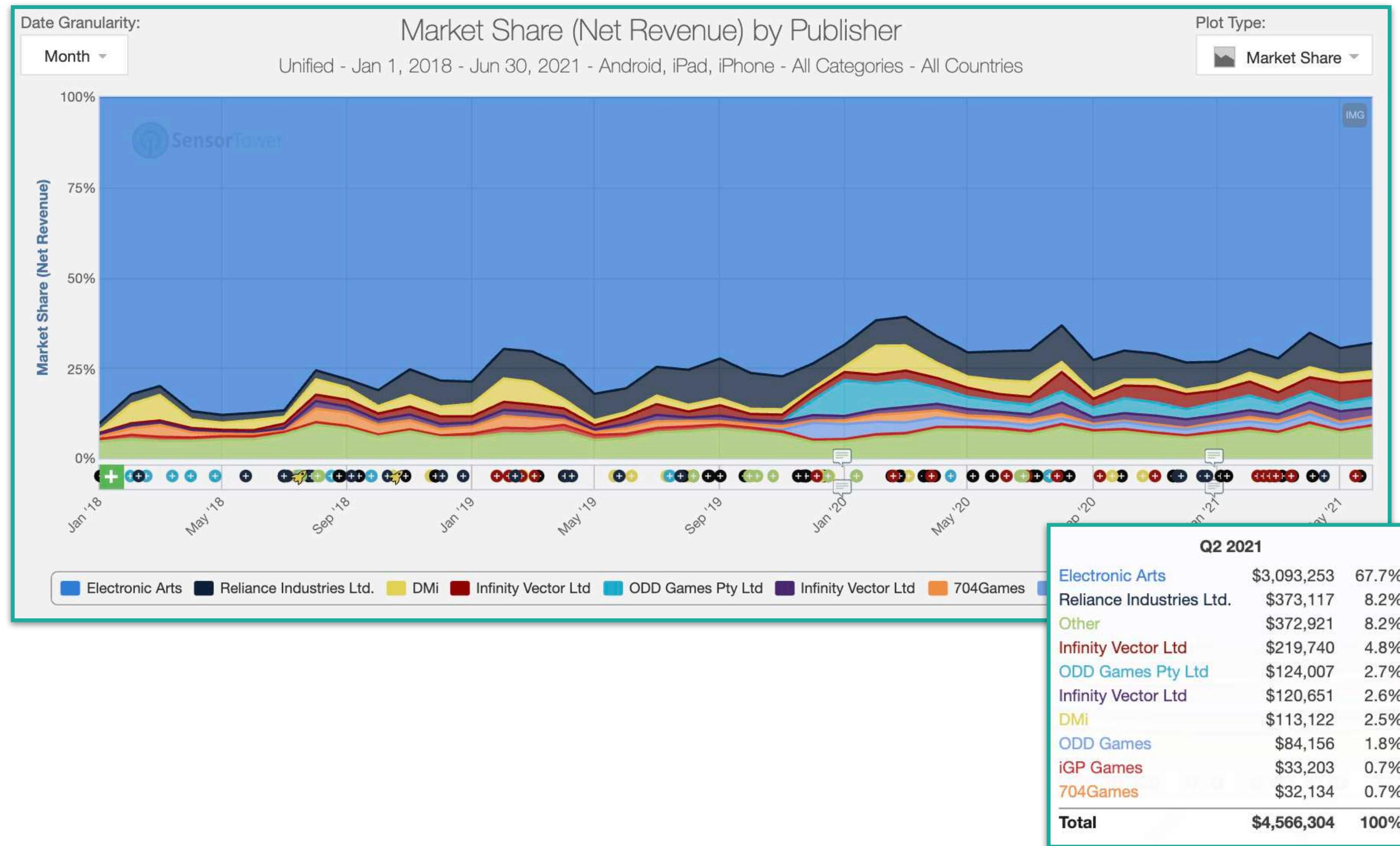
Since Jan 2018, the top 5 revenue earners are *Real Racing 3* (75% revenue share), *F1 Mobile Racing* (5%), *NASCAR Heat Mobile* (4%), *Assoluto Racing: Real Grip Racing & Drifting* (4%), and *Trucks Off Road* (3%)

iOS devices account for 55% of total revenues. US is the No.1 market with 32% revenue, followed by Germany (12%) and Japan (8%)

# Electronic Arts Dominates Racing Simulator Publisher Revenues

Publisher revenues for Racing Simulators, Jan 2018 through June 2021

[View in Store Intelligence](#)



The top 5 highest-grossing publishers in this sub-genre (Electronic Arts, Reliance Industries, DMi, Infinity Vector, ODD Games) account for 89% of total downloads

Among these 5, Electronic Arts is the historic market leader with 75% revenue share from Jan 2018 to June 2021, with Reliance Industries in a distant 2nd at 6% revenue share

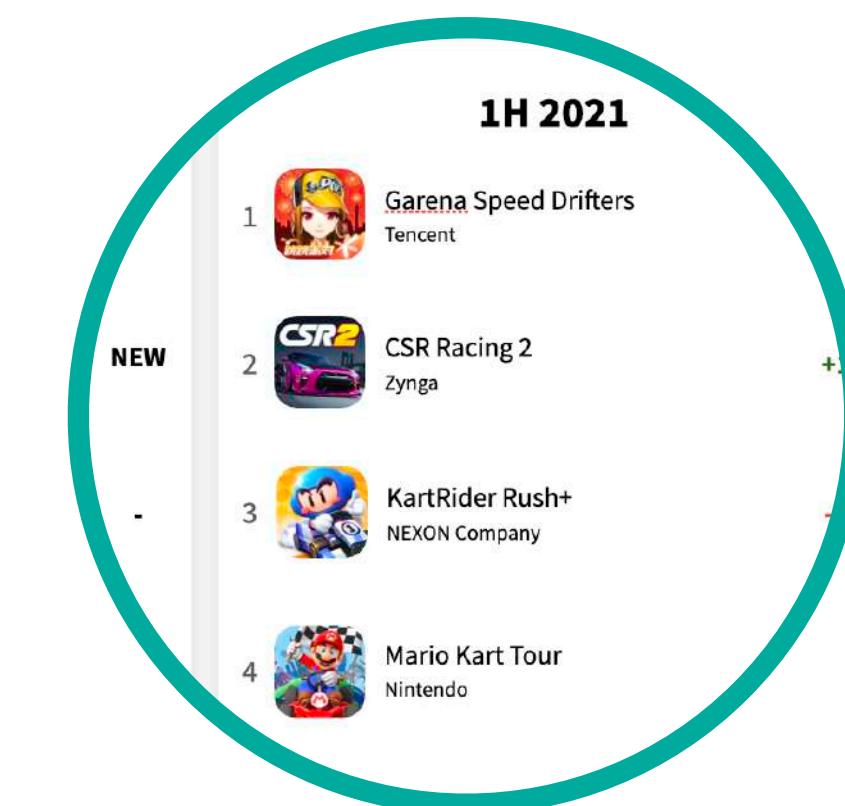
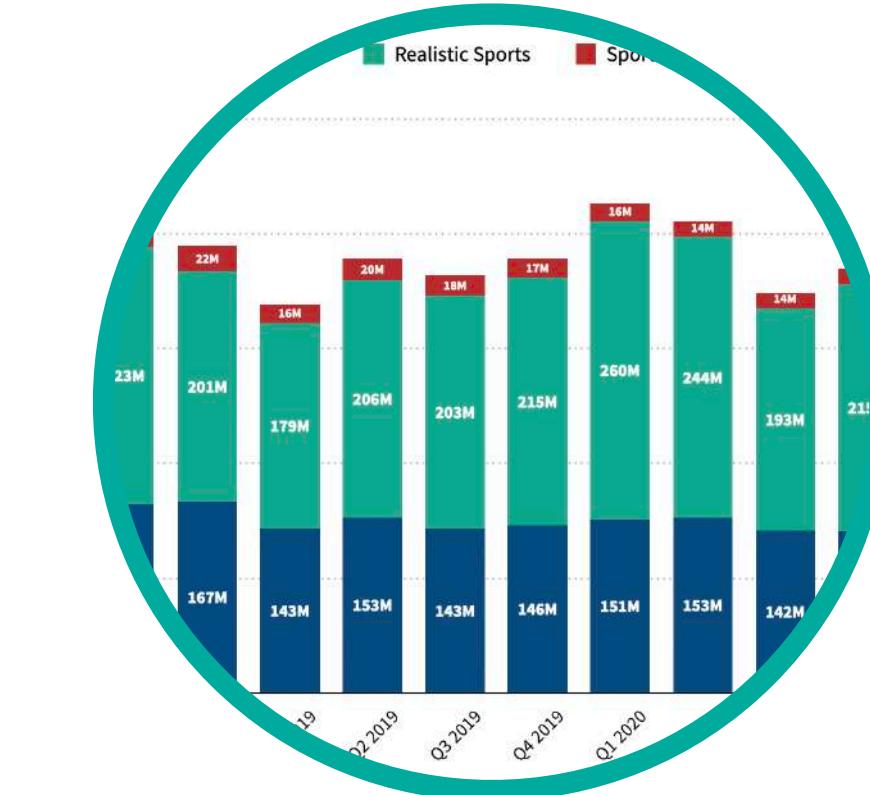
Over the course of this period, Electronic Art's monthly revenue share has decreased slightly from over 90% in Jan 2018 down to 68% in the most recent quarter (Q2 2021)

# Conclusion

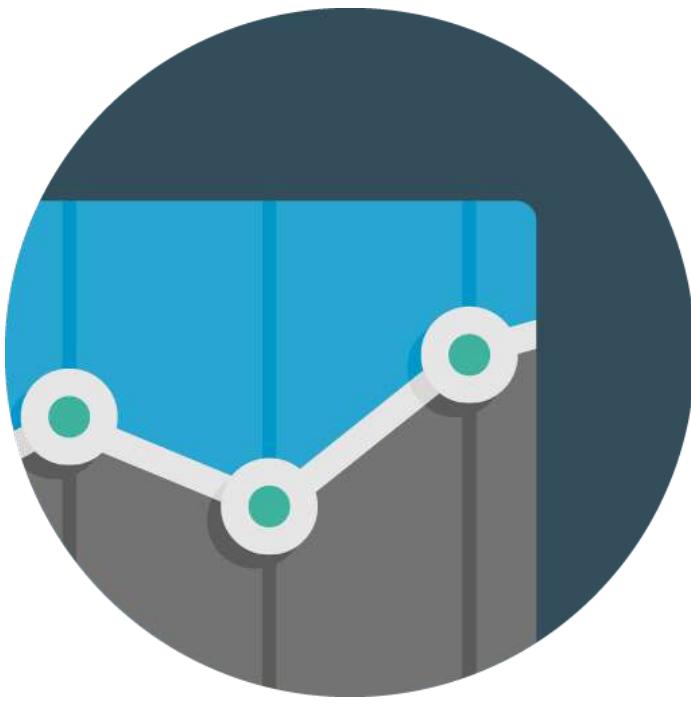


# Conclusion:

- The Sports games category has seen an overall stable download trend since January 2018. The pandemic caused an increase in downloads from 378M in Q4 2019 to 426M in Q1 2020. Downloads decreased thereafter and have normalized to pre-Covid levels. On the other hand, revenues of Sports games increased in every quarter of 2020, before declining slightly in 2021, in large part due to the high YoY growth of 54% in Realistic Sports sub-genre
- 8 Ball Pool and Soccer games have the most downloads, while Konami's baseball titles are among top revenue earners. Sports games also include several IP games among with FIFA Soccer leads the way in revenues and downloads
- Covid-19 did not have as large of an impact on the Racing category, however Arcade Racing, the most popular sub-genre in terms of downloads, peaked during the first wave in Spring 2020. Downloads have normalized to pre-Covid levels in 1H 2021
- Kart Racing is the key revenue-driving sub-genre for the Racing category, with 3 of the top 5 highest-grossing Racing games belonging to this sub-genre. China is the top market for revenues, while US is the leading market for downloads (at only 9% share). IP-based titles lead this category



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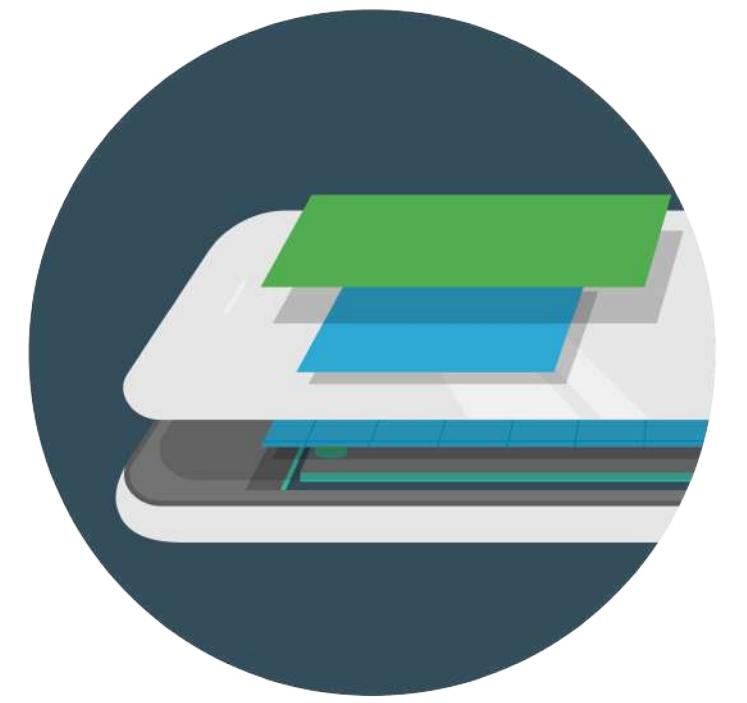
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Develop winning User acquisition campaigns with crucial mobile advertising insights.



## Usage Intelligence

Benchmark app usage, engagement, and demographics.



## App Teardown

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

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## Office Locations:

 San Francisco, London, Shanghai, Seoul

## Contact Info:

 [sensortower.com](https://sensortower.com)

 [sales@sensortower.com](mailto:sales@sensortower.com)

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