

Mobile Game Market Review December 2023



It's a new year, which can only mean one thing—even more updates to the biggest and most popular mobile games! But before we get to that, let's not forget all the exciting things that landed in December. [Diablo Immortal](#) shows its fangs with a new Vampire Survivors-inspired mode, [Homescapes](#) released its first new minigame event type in over a year, and Tencent released a worthy competitor to Eggy Party and Stumble Guys with their party royale game, [DreamStar](#).

That's far from everything our analysts unwrapped during December. [Last Fortress: Underground](#) got into the Christmas spirit by launching a month-long collaboration event with Amazon's hit superhero TV series The Boys, which included a new side mode in the style of Survivor!..lo. Meanwhile, [CookieRun: Kingdom](#) players sought clues to unravel a murder mystery in a narrative-focused event based on the works of Agatha Christie.

Royal Match's digging minigame also appears to be shoveling its way into more mobile games, with [Cooking Madness](#) dishing up its own innovative interpretation of the event type that comes complete with a unique battle pass. Speaking of [Royal Match](#), that ever-popular match3 title also kept itself busy in December with a Dragon Nest event inspired by Scopely's [Monopoly GO!](#).

You'll find more information on all the above games, as well as many of the other major updates that landed in December 2023, down below.

December's casual mobile game updates

Given the overwhelming success of Monopoly GO!, it was only a matter of time before other games started to put their spin on some of its best ideas. In December, our analysts spotted that Royal Match introduced Monopoly GO!'s ["Partner Events"](#) to its user base with the cooperative [Dragon Nest event](#).

The two events are very similar and see individual players working closely with four other players in multiple teams of two to collect a special event currency by completing the main progression levels and other events. Players can spend this currency by spinning a wheel (Monopoly GO!) or shooting a ball into a [Plinko board](#) (Royal Match) to accumulate points needed to unlock boosters, coins, and a unique avatar frame.



Royal Match's Dragon Nest (left) and Monopoly's GO! Partner Event (right) are very similar

Players have an individual reward progression meter with each partner and earn a special prize if they hit all the thresholds with every player. These progression meters are visualized by something that “evolves” as you play. In Royal Match, it’s represented by a dragon that grows as you hit each threshold. Comparatively, in Monopoly GO!, the look changes in line with the current season—some examples include a garden and a Thanksgiving feast.

For the first time in over a year, Homescapes introduced a new minigame event type, [restoration events](#), which combine casual tycoon gaming elements with exploration mechanics. These restoration minigame events heavily focus on resource gathering, building construction, and time management to the point where they feel like mini-tycoon titles inside a match3 game.

Restoration events take place in a separate game mode on its own map, full of debris and obstacles that need to be removed by spending event energy. This restoration event energy replenishes with time and can also be obtained by clearing match3 levels in the main progression, cooking food in the firepit, or via IAP.



Homescapes’ new Ranch Adventures event has players restoring a family horse ranch for an upcoming celebration

Progression is tied to a set of specific tasks, which, upon completion, gradually reveal the story of the area the players have been restoring. Those who finish the whole project get a special reward related to the area and story. For example, completing the Ranch Adventures restoration event awards players a horse-themed centerpiece decoration. There are various other progression rewards too, including event energy, lives, and boosters.

Homescapes also added special 24-hour sale campaigns [for its season passes](#) in December. These offers enticed players to purchase the pass at discounted prices during a limited window at varying price points.



The Season Pass sale campaigns offered players the ongoing pass at a limited-time discounted price

The digging minigame we first mentioned in [our last bulletin](#), where players earn mining picks (or similarly named equivalent) and use them to dig their way through a grid to uncover valuable in-game rewards, continued to grow in popularity in December. The minigame type has now sailed into [Cooking Madness](#) with [The Pirate Treasure](#), where it's been combined with a battle pass for the first time.

Unlike most other battle pass implementations, which typically rely on a [point-based progression mechanic](#), the only way to progress in this battle pass is to dig up gems in the minigame. As a result, unlocking battle pass rewards was more difficult than usual, as the chances of uncovering a gem are random. The minigame also urged players to complete specific game levels, which rewarded players with Shovels (The Pirate Treasure's version of mining picks) and other event materials.



The Pirate Treasure Battle Pass had a minigame layer with the popular digging mechanic

Additional casual gaming highlights and other news

- ◆ Tencent released its party royale game, [DreamStar \(元梦之星\)](#), in China, which looks to be a worthy competitor to Eggy Party and Stumble Guys. While all three games share similarities, Eggy Party and DreamStar have a specific focus on social hubs, boasting vibrant user-generated content scenes, various game modes, and season-based live ops. The most significant difference between the two is that Dreamstar focuses more focus on shooting gameplay, which we expect will evolve further over time. At the moment, DreamStar is the most downloaded title in China and ranks within the top 10 grossing titles.



Tencent's DreamStar (top) has a striking resemblance to Eggy Party (bottom)

December's midcore mobile game updates

Our analysts are used to seeing mobile games get into the festive spirit by launching sales and IAP offers, but less so when it comes to seasonal IP collaborations. Nevertheless, that was the approach of [Last Fortress: Underground](#), which brought back its collaboration with Amazon's hit TV series The Boys. The crossover lasted the whole month of December and was broken down into several phases, each weaved into the game's narrative, providing a drip feed of new content to drive engagement.

For example, the first phase brought back elements from the first collaboration with The Boys in July 2023, such as a limited-time gacha with popular characters Hughie, Butcher, and Starlight. The second phase introduced a limited-time shop, the Vought Exchange, where players could spend Xmas Tokens (earned from other collab events or via IAP) to acquire items themed around The Boys. Then, a third phase finally introduced Homelander, the TV series' titular villain.

The above only provides a brief glimpse at everything introduced during the event—a more comprehensive overview of all the new tasks, battle passes, gachas, and event shops is available [on the GameRefinery platform](#).



Last Fortress x The Boys Collab returned in December

Alongside The Boys crossover event, Last Fortress: Underground also added a special Survivor.io-inspired mode called [Desperate Escape](#) to the game on December 4th. This was first introduced as a minigame event during The Boys' first collaboration event. It was seemingly popular enough to warrant being fleshed out into its own permanent gameplay mode that comes complete with extra playable content in the form of 16 stages. It's a big change of pace from the core 4X gameplay, with much more zombie-slaying action.



A Survivor!.io-type mode is now a permanent addition to Last Fortress: Underground

[Cookie Run: Kingdom](#) chose to celebrate the holidays very differently with an interactive detective story event inspired by Agatha Christie. It followed a new character, Linzer Cookie, who was unraveling the mystery of who killed “Old Jolly” on the Holiday Express train. Players had to gather and choose the correct evidence to piece together what happened.

Much like Agatha Christie’s novels, the event was split into chapters, with new parts released every few days. However, if players wanted to play the whole thing straight away, two early access tickets were available for purchase. Both came with exclusive cosmetics and event currency gifts, but opting for the more expensive one unlocked access to an exclusive epilogue chapter.

As a whole, this event marked a departure from the usual content seen in Cookie Run: Kingdom, which typically focuses on combat with only linear storytelling elements. The last time the game experimented with narrative this way was [a month-long Romance Kingdom event celebrating April Fools](#). In it, players followed anime-style human school student versions of the game's characters in a mystery-romance visual novel.



Cookie Run: Kingdom offered two purchasable tickets that allowed players to experience the whole story immediately.

Diablo Immortal had one of its [largest major content updates so far, titled Splintered Souls](#), which included loads of new content, features, and monetization. The main highlights were the Familiars pet system, Survivor's Bane roguelite minigame mode, and a new Southern Dreadlands zone that includes a Sentinel's Stand tower defense zone event and continuation to the game's main storyline.



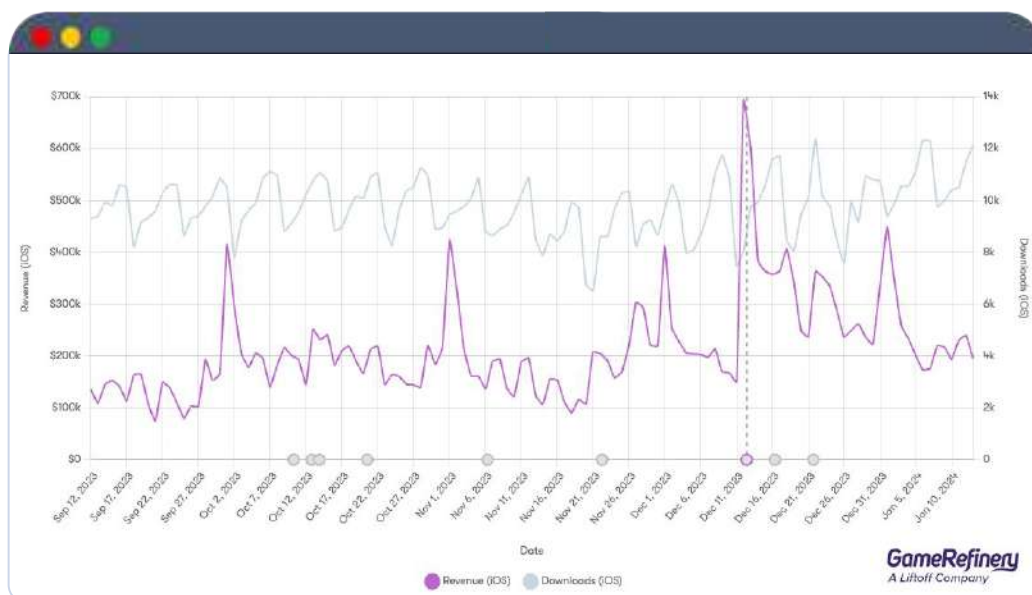
Diablo Immortal's Familiars pet system brings a new meta-layer

Diablo Immortal has been bringing a variety of new gameplay mechanics that are new to the franchise, including MOBA and Battle Royale gameplay. This time they brought [Survivor's Bane](#), which is a limited-time minigame mode with portrait roguelite gameplay that takes elements from [Vampire Survivors](#) and [Survivor.io](#) and blends them with Diablo's gameplay. The mode has you play as your own character but with the combination of selectable skills being from all of the Diablo Immortal classes, giving some wild skill combination possibilities. Rewards for playing the mode were similar to the game's other modes, including player XP, materials, and even legendary equipment items, so even for a min-maxer, the mode was worth participating in. There were also permanent achievements that hinted that the event would become a recurring addition to [Diablo Immortal's live event framework](#).



Diablo Immortal's Survivor's Bane roguelite mode

In its December update, [Clash of Clans](#) added a new Town Hall level. This included additional upgrade levels for different buildings around the player's base, as usual. However, one notable change up is that when players upgrade to the latest Town Hall level, instead of purchasing new defense buildings in the shop, players now see an option to purchase the ability to merge existing defense buildings that meet specific requirements into a single, more powerful defense building.



Clash of Clans' December update resulted in a significant spike in daily revenue in the US (GameRefinery platform)

The December update also introduced an all-new hero equipment system which added more depth to players' power progression and further customization elements to hero abilities for tactical battles. There was also an assortment of Christmas events, including a festive recurring battle pass, PvE challenge events, and, most notably, Clash of Clans' very first limited-time battle pass.

Combined, these updates resulted in a substantial spike in daily revenue of almost 350%+ in the US. However, it's worth noting that past Town Hall level increases also saw similar boosts, so this may have been the dominating factor. These updates for Clash of Clans have been received particularly well in China, where it currently ranks in the top 10 grossing (albeit under a different game ID).



Cookie Rumble was the first limited-time Battle Pass added to the game.

- ◆ A sniping game reminiscent of Deer Hunter called [Hunting Sniper](#) peaked at grossing 88 during December.
- ◆ [Last War: Survival](#) scaled heavily through December and peaked in the top GR 50, DL 5. It is a 4X game with a casual cartoonish art style and hypercasual-inspired minigame levels.



Last War: Survival

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