



# The State of Card Battler Mobile Games 2021

An Analysis of the Card Battler Sub-Genre



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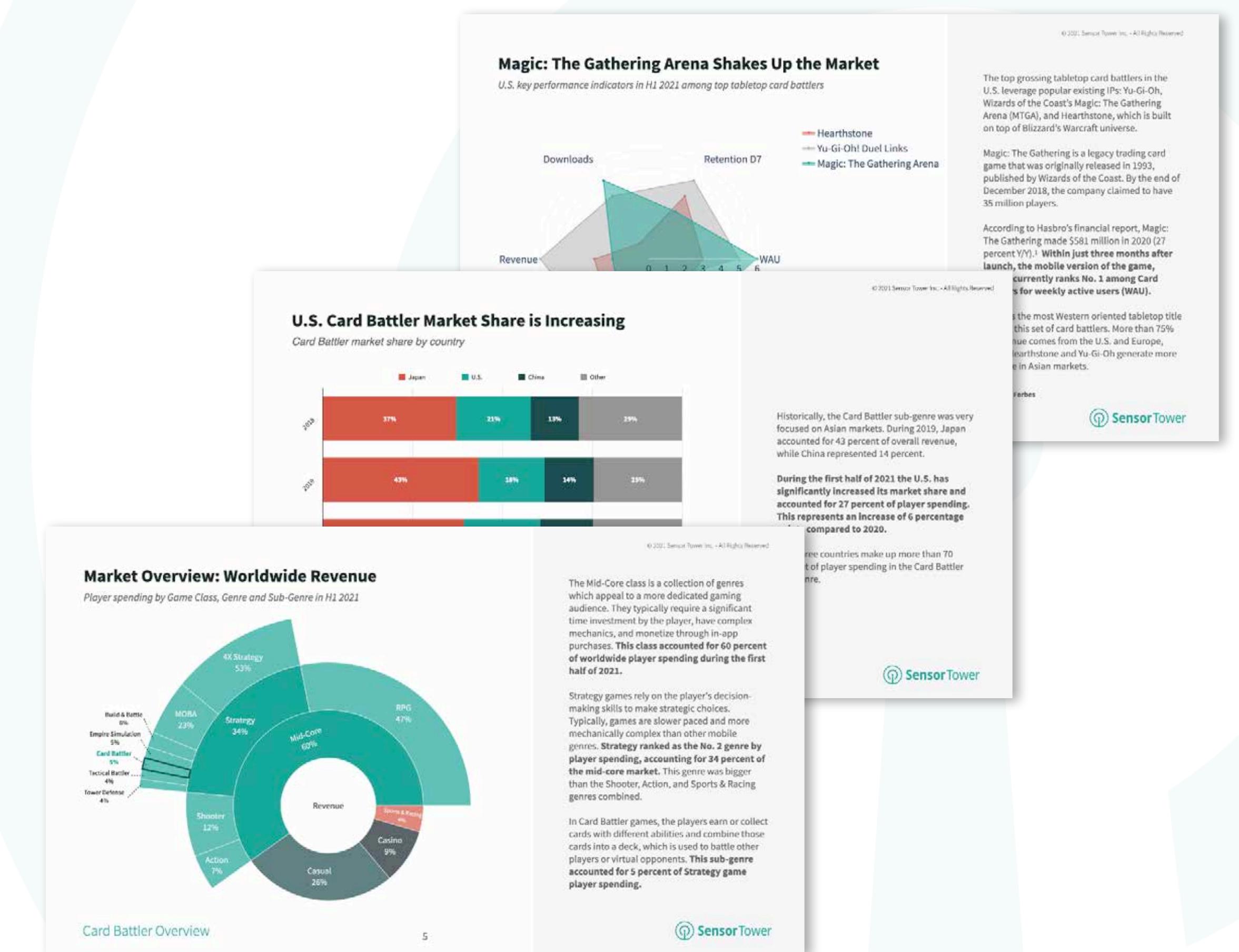
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# Introduction

This report provides an overview of the Card Battler sub-genre of mobile games, delving into the current market landscape, the most popular titles, and growth opportunities.

This analysis leverages **Sensor Tower's Game Taxonomy, Game Intelligence, Store Intelligence, and Ad Intelligence** data.

- Revenue figures are gross revenue (including the cut taken by Apple or Google).
- Download estimates presented are on a per-user basis, meaning that only one download per Apple or Google 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.
- Android app install estimates represent downloads from the Google Play Store only. Sensor Tower does not provide download estimates for third-party Android stores.



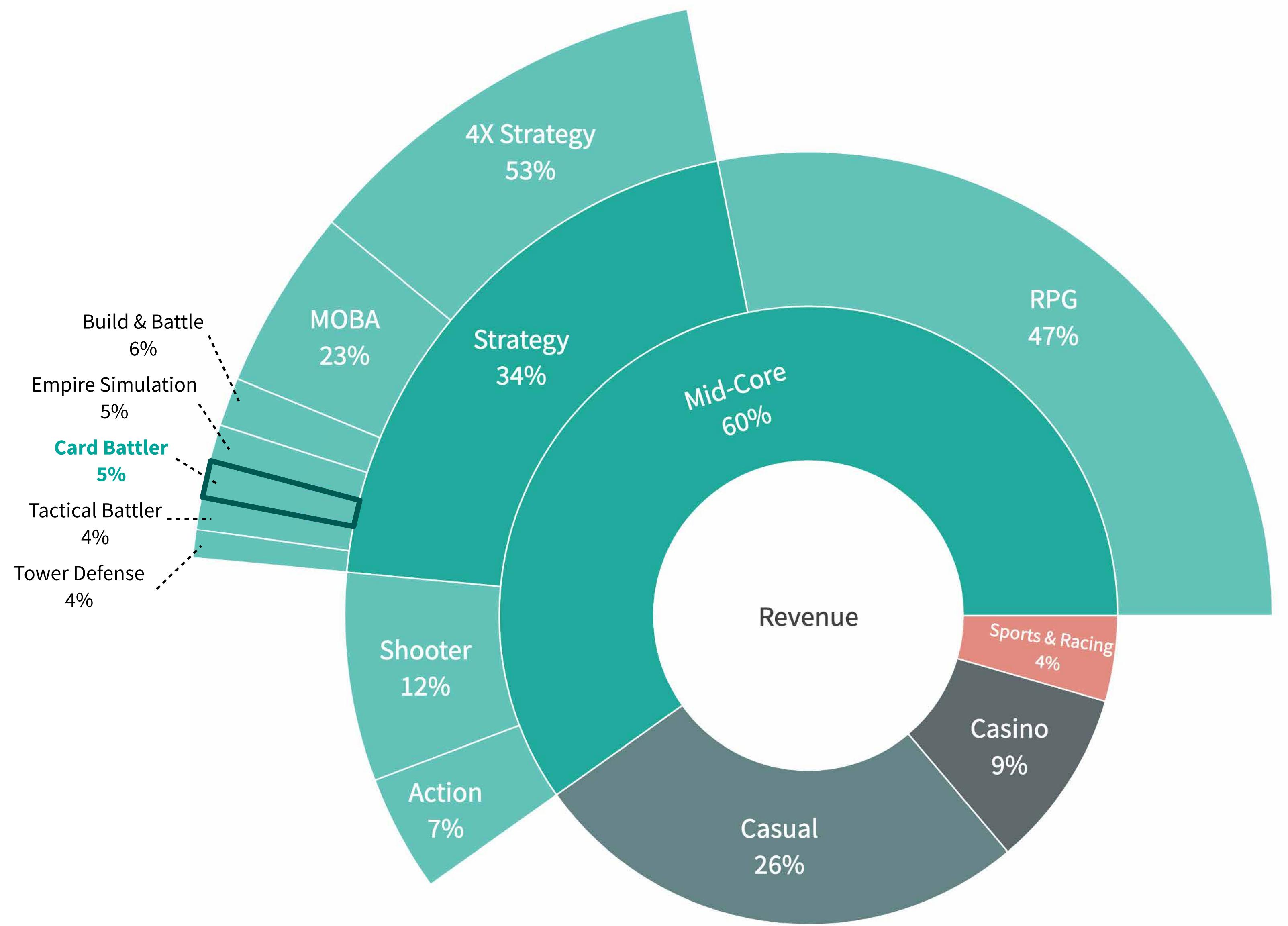


# Card Battler Games: Worldwide

An Overview of the Card Battler Sub-Genre

# Market Overview: Worldwide Revenue

*Player spending by Game Class, Genre, and Sub-Genre in H1 2021*



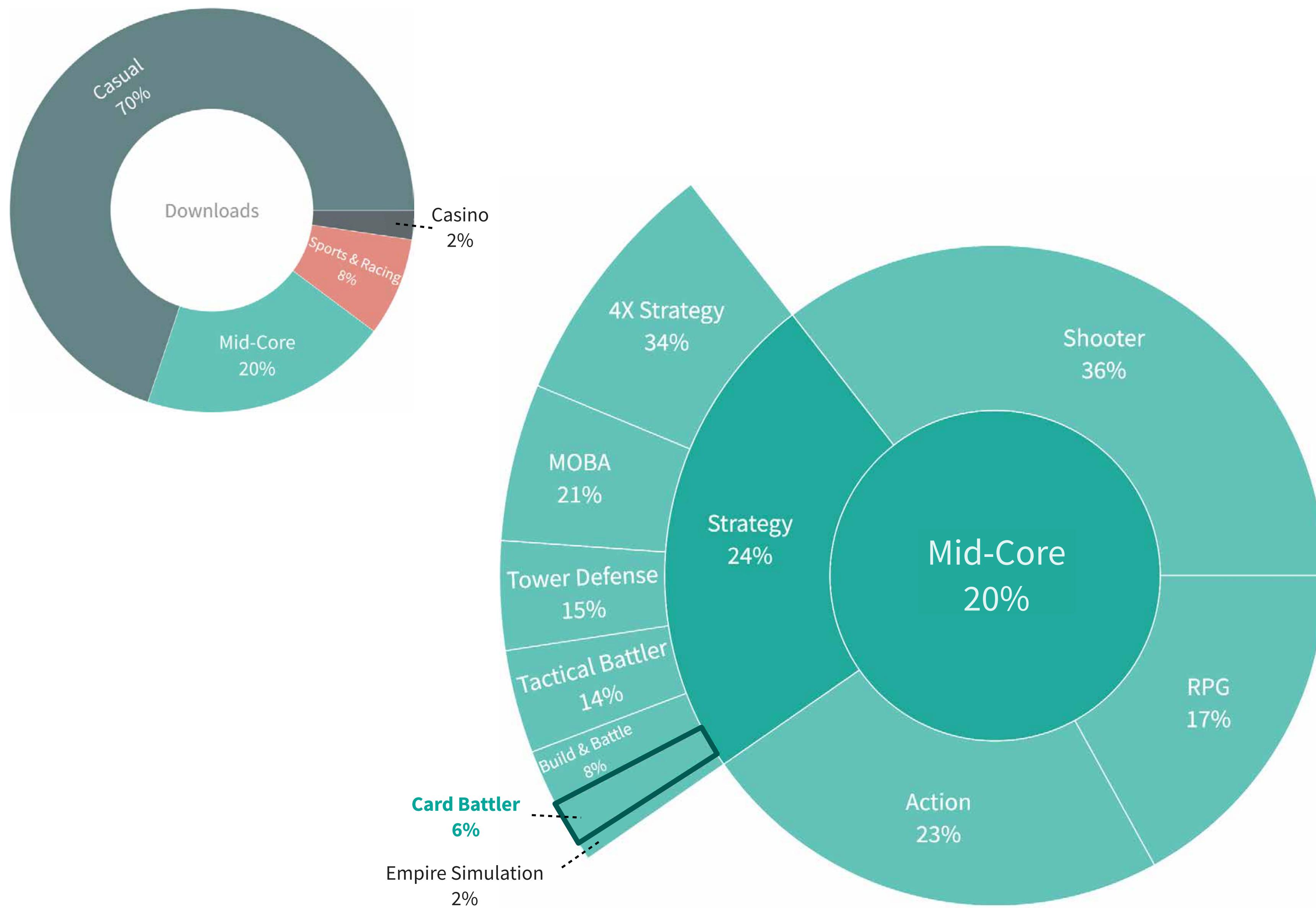
The Mid-Core class is a collection of genres which appeal to a more dedicated gaming audience. They typically require a significant time investment by the player, have complex mechanics, and monetize through in-app purchases. **This class accounted for 60 percent of worldwide player spending during the first half of 2021.**

Strategy games rely on the player's decision-making skills to make strategic choices. Typically, games are slower paced and more mechanically complex than other mobile genres. **Strategy ranked as the No. 2 genre by player spending, accounting for 34 percent of the mid-core market.** This genre was bigger than the Shooter, Action, and Sports & Racing genres combined.

In Card Battler games, the players earn or collect cards with different abilities and combine those cards into a deck, which is used to battle other players or virtual opponents. **This sub-genre accounted for 5 percent of Strategy game player spending.**

# Market Overview: Worldwide Downloads

*Downloads by Game Class, Genre, and Sub-Genre in H1 2021*



Even though more than half of player spending was concentrated in the Mid-Core class, the vast majority of downloads were from Casual games. Excluding Hypercasual games, Casual games accounted for 70 percent of downloads. Mid-Core games accounted for just 20 percent of worldwide installs.

The Shooter genre ranked as the No. 1 most popular genre among Mid-Core games. Strategy was the second largest genre by downloads, accounting for 24 percent of the Mid-Core installs in the first half of 2021.

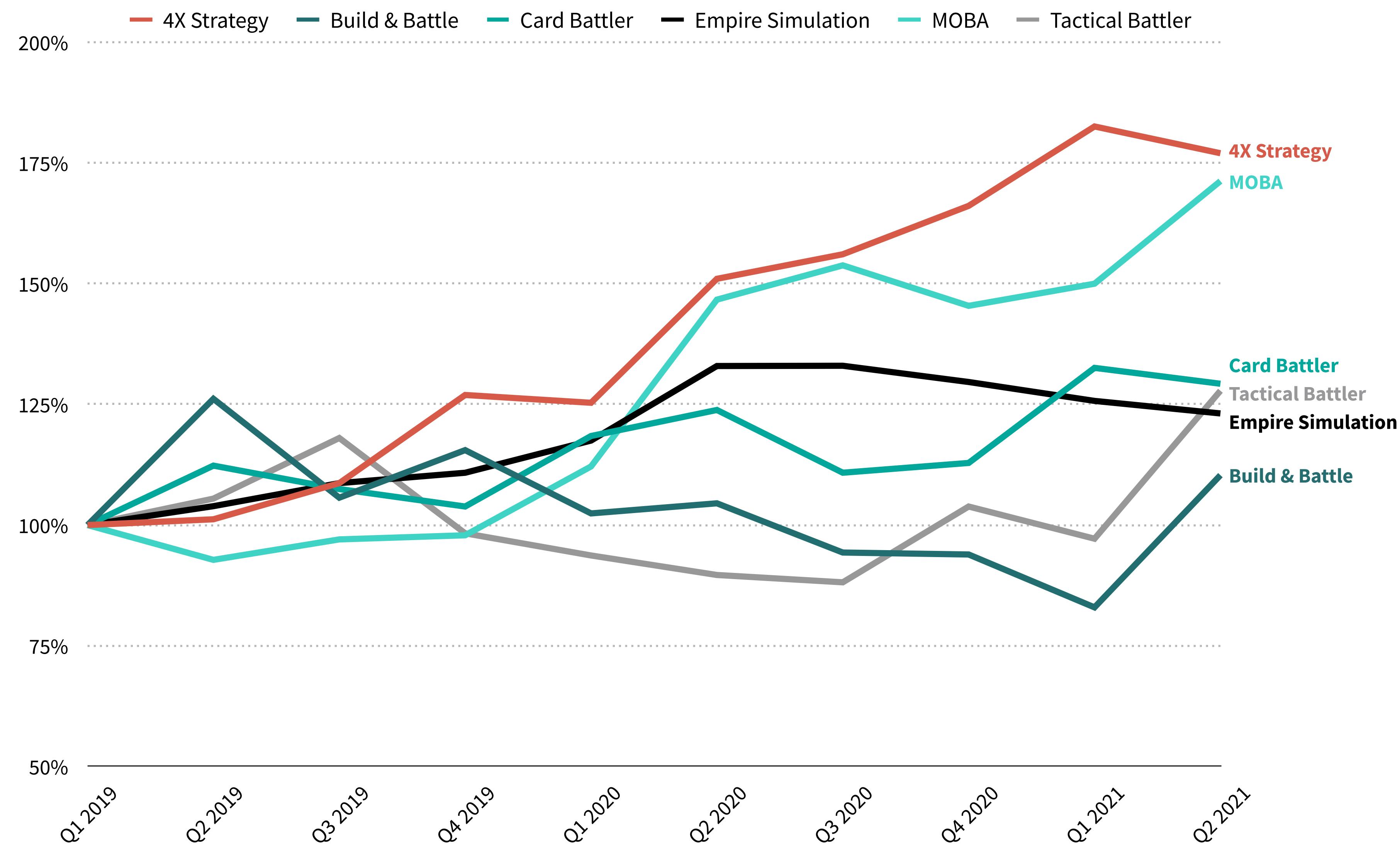
The Card Battler sub-genre accounted for 6 percent of overall Strategy downloads.

## Note Regarding Downloads Charts

Hyper-casual titles are excluded.

# Card Battler Games Saw Steepest Revenue Gains in 1Q21

Quarterly worldwide Strategy genre revenue by sub-genre (indexed to Q1 2019)



Two sub-genres have stood out in terms of worldwide revenue over the past two years: 4X Strategy and MOBA. They were the fastest growing and highest grossing sub-genres, accounting for 53 percent and 23 percent of overall Strategy genre revenue, respectively.

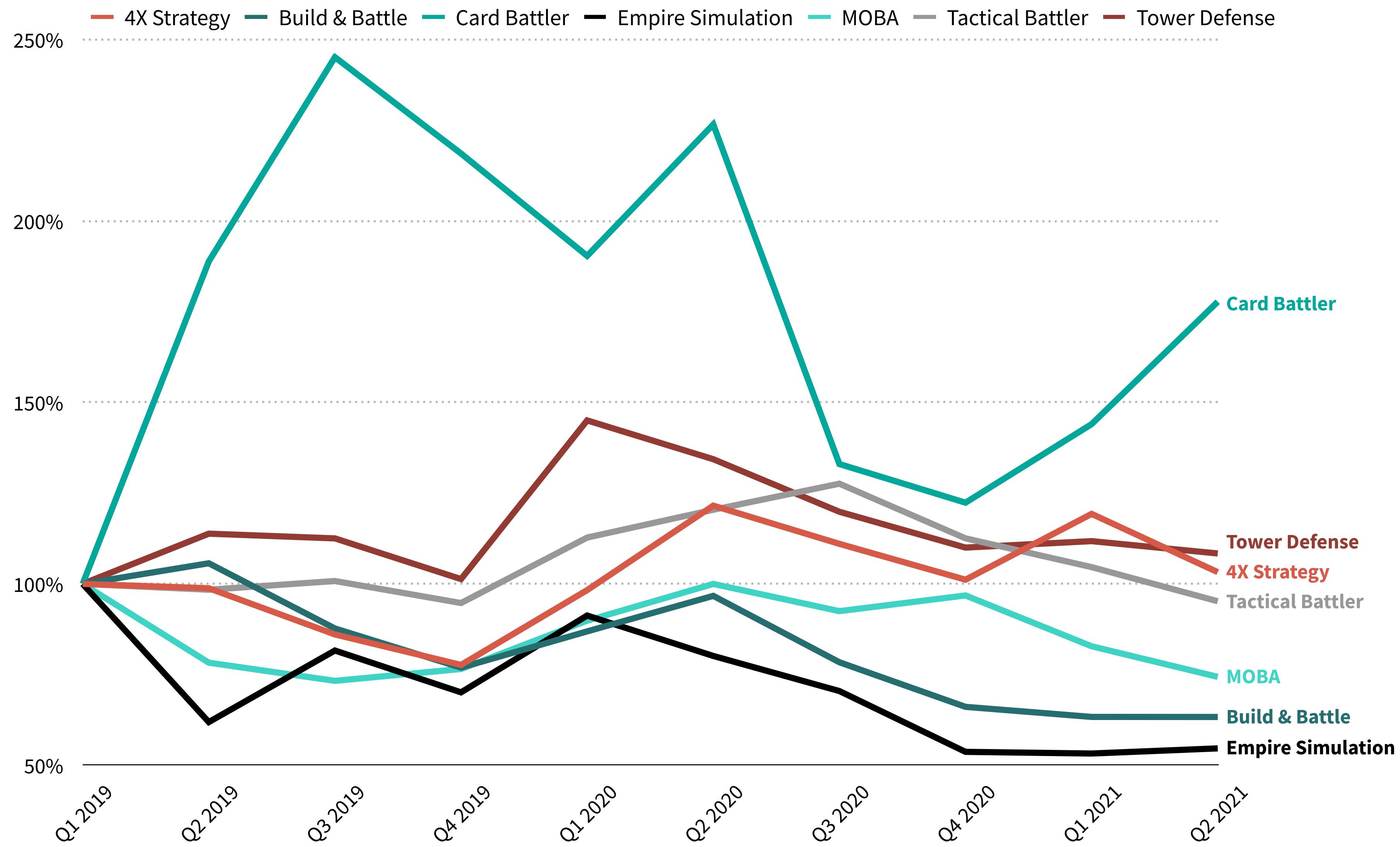
The Tower Defense\* sub-genre exhibited rapid growth during the last two years, with revenue increasing by more than 500 percent.

**Card Battler revenue increased 17 percent Q/Q during Q1 2021, its steepest rise over the last two years, and has remained stable since. During the first half of the year, titles in these sub-genres generated approximately \$380 million in player spending.**

\*Tower Defense is excluded from the chart due to scale.

# Card Battler is the Fastest Growing Strategy Sub-Genre

Quarterly worldwide Strategy genre downloads by sub-genre (indexed to Q1 2019)



The Card Battler sub-genre is relatively small when compared to 4X Strategy or MOBA. Nevertheless, it has seen strong growth in downloads during the last two years.

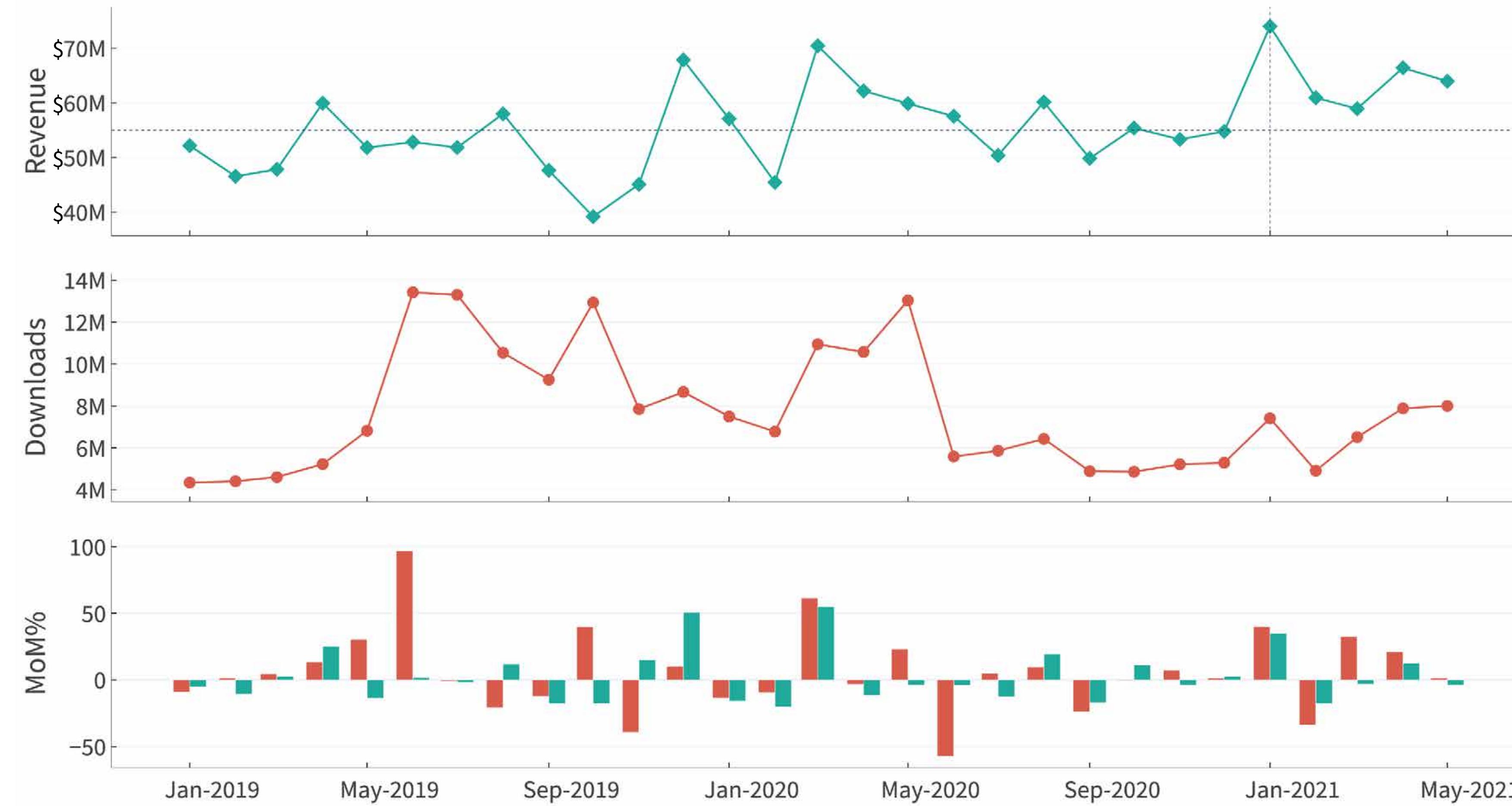
The first spike in installs was observed in Q3 2019, when Dragonest Games released Auto Chess and Proxima Beta published Chess Rush. Both games exceeded the 5 million worldwide downloads mark during that quarter.

The sub-genre's installs spiked again during Q2 2020 with the worldwide release of Legends of Runeterra, a card battler game published by Riot Games using the League of Legends IP.

During Q2 2021, downloads of Card Battler titles saw a double digit increase for the second quarter in a row, rising by 23 percent quarter-over-quarter. During this period, installs were propelled by Mighty Party and Magic: The Gathering Arena.

# Card Battler Monthly Spending Exceeded \$55 Million

*Worldwide spending, downloads, and month-over-month change for Card Battler sub-genre*



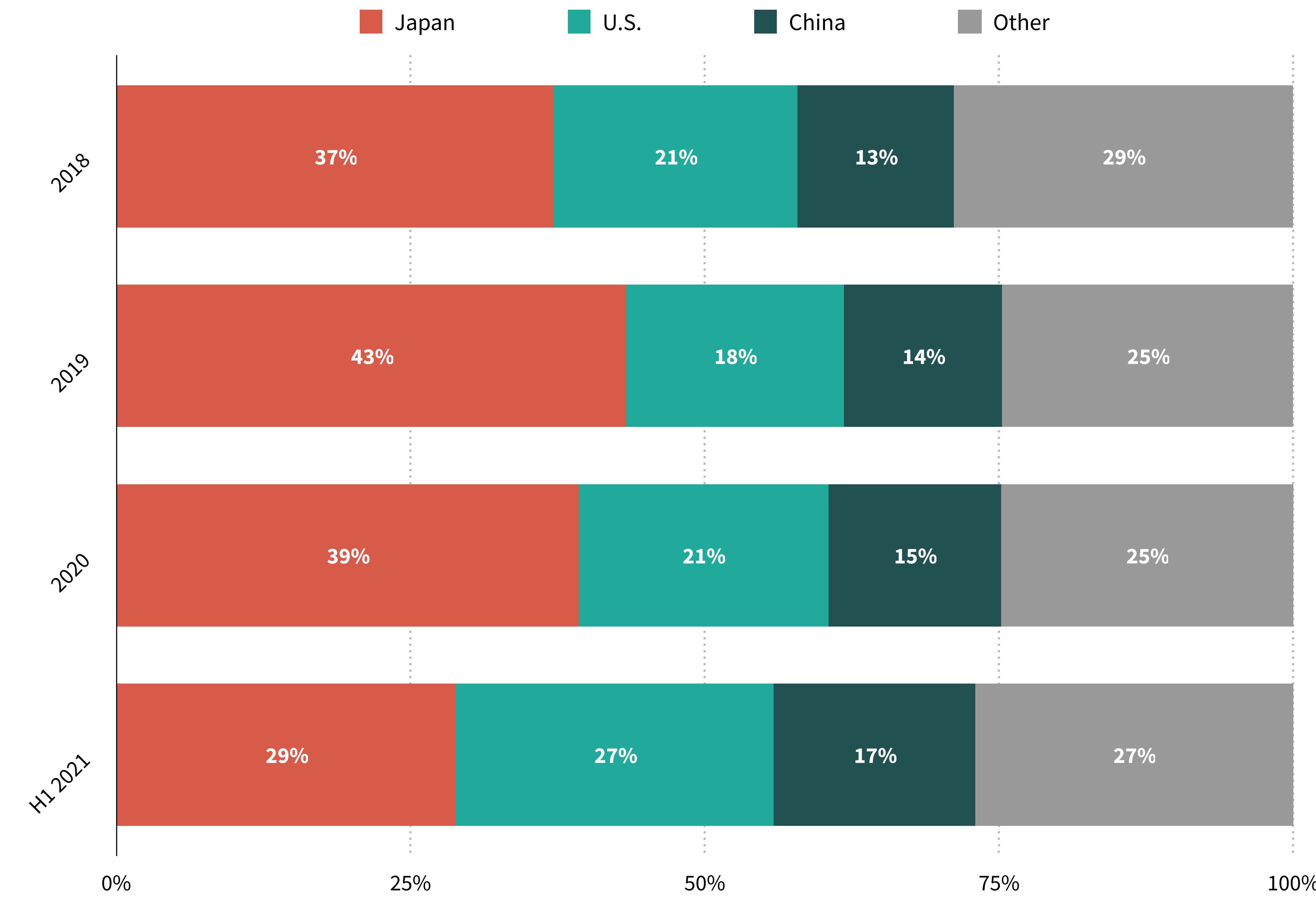
**The Card Battler sub-genre had a revenue peak during January 2021. Since the start of the year, the sub-genre has held a new baseline in player spending of over \$55 million per month.**

The January revenue spike was largely driven by the strong revenue performance of Yu-Gi-Oh! Duel Links, which celebrated its four year anniversary since launch with a special promotion. Worldwide monthly player spending for the title increased by 190 percent from \$9.6 million in December 2020 to \$27.9 million in January 2021.

While Card Battler downloads have not reached the height of 2019, they have consistently been on the rise since February 2021, showing an increased interest in these games.

# U.S. Card Battler Market Share is Increasing

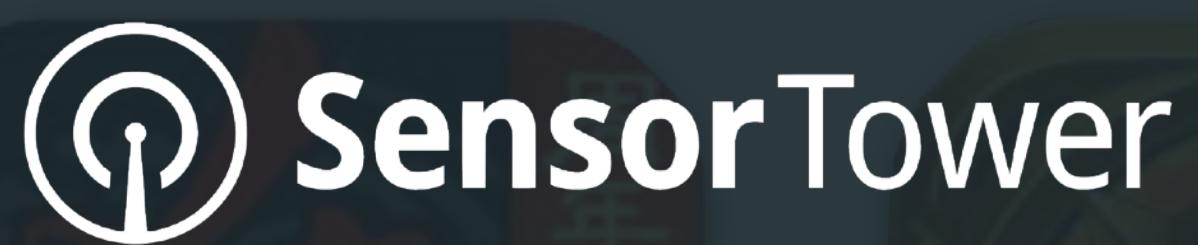
*Card Battler market share by country*



Historically, the Card Battler sub-genre was very focused on Asian markets. During 2019, Japan accounted for 43 percent of overall revenue, while China represented 14 percent from its App Store alone.

**During the first half of 2021, the U.S. has significantly increased its market share and accounted for 27 percent of player spending. This represents an increase of 6 percentage points compared to 2020.**

The three countries make up more than 70 percent of player spending in the Card Battler sub-genre.

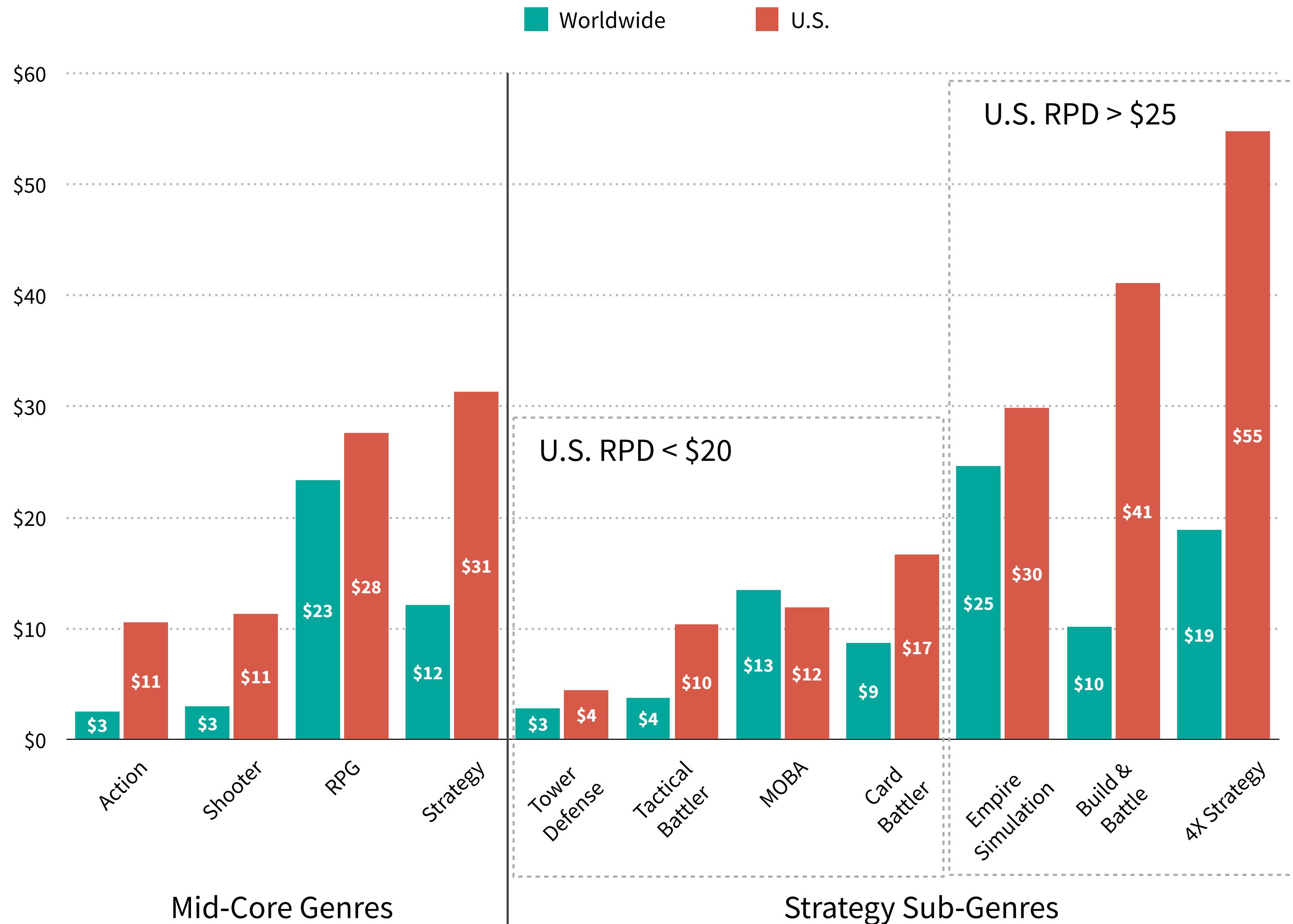


# Mid Core Comparison

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An Overview of the Mid-Core Genres

# Strategy has Highest Revenue Per Download in the U.S.

Revenue per download by game genre and Strategy sub-genre in H1 2021



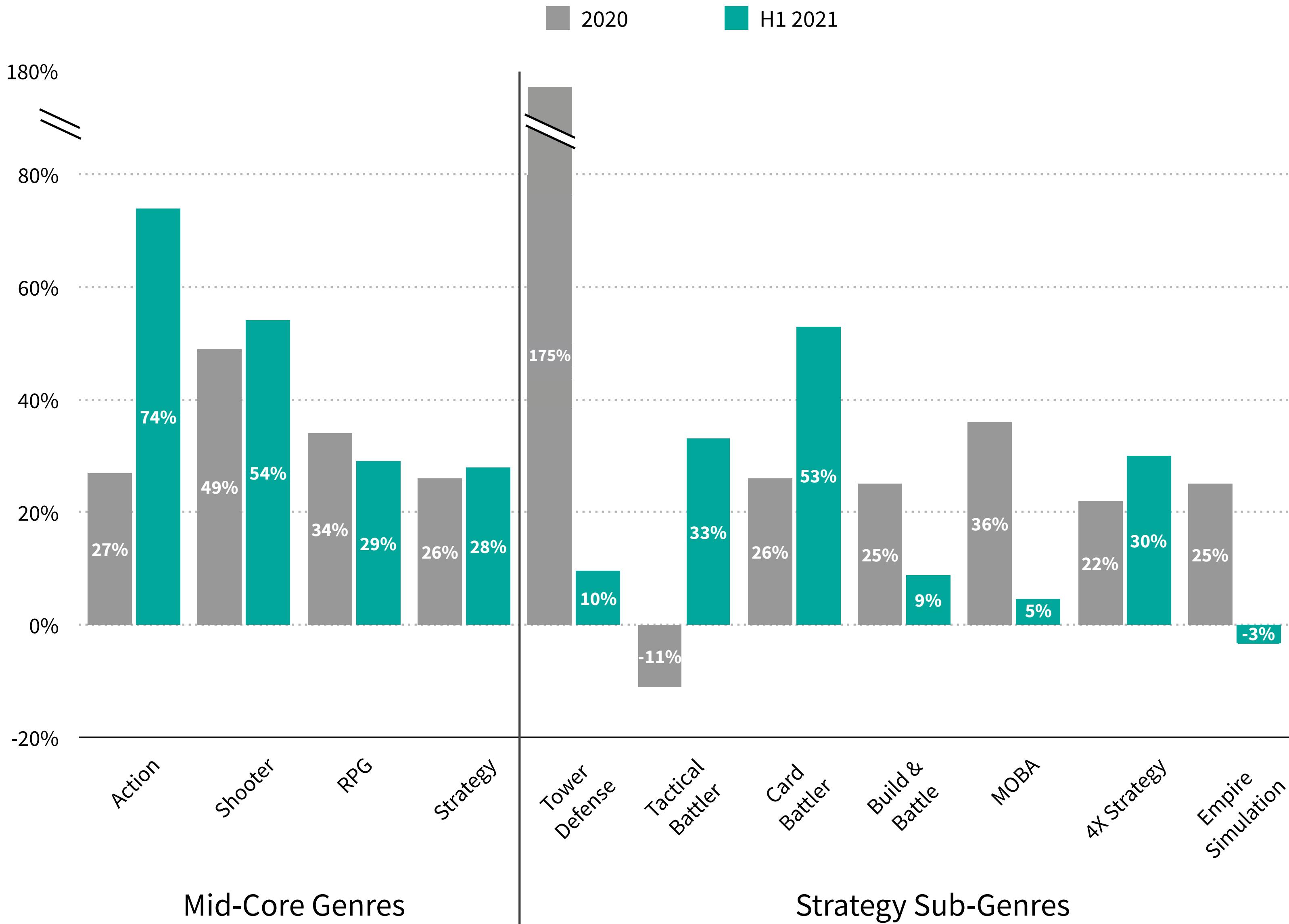
The average revenue per download (RPD) of the Strategy genre in the United States was \$31 during the first half of 2021. This figure is 2.6 times higher than the worldwide average. The same pattern is observed among all mid-core genres, which explains why the U.S. is considered a Tier 1 market.

In some genres such as Action and Shooter, the U.S. RPD was three times higher than the worldwide average.

**The RPD of the Card Battler sub-genre was \$17 in the U.S., a figure close to double the \$9 worldwide average. This indicates that the sub-genre is a good fit for the U.S. market and has the potential to become a standout like Build & Battle or 4X Strategy as it matures.**

# Card Battler Has Fastest Growing RPD in Strategy Genre

*Revenue per download growth by game genre and Strategy sub-genre in the U.S.*



On average, Strategy genre RPD increased by 28 percent during the first half of 2021 in the U.S.

**Even though the U.S. RPD of the Card Battler sub-genre is still below \$20, it is the fastest growing among all the Strategy sub-genres (53 percent).** This growth is comparable with that of Shooter games (54 percent), which is surpassed only by Action games (74 percent).

## Note

Revenue per download is calculated using revenue and downloads in each period. 2020 growth is compared to 2019, and H1 2021 growth is compared to 2020.

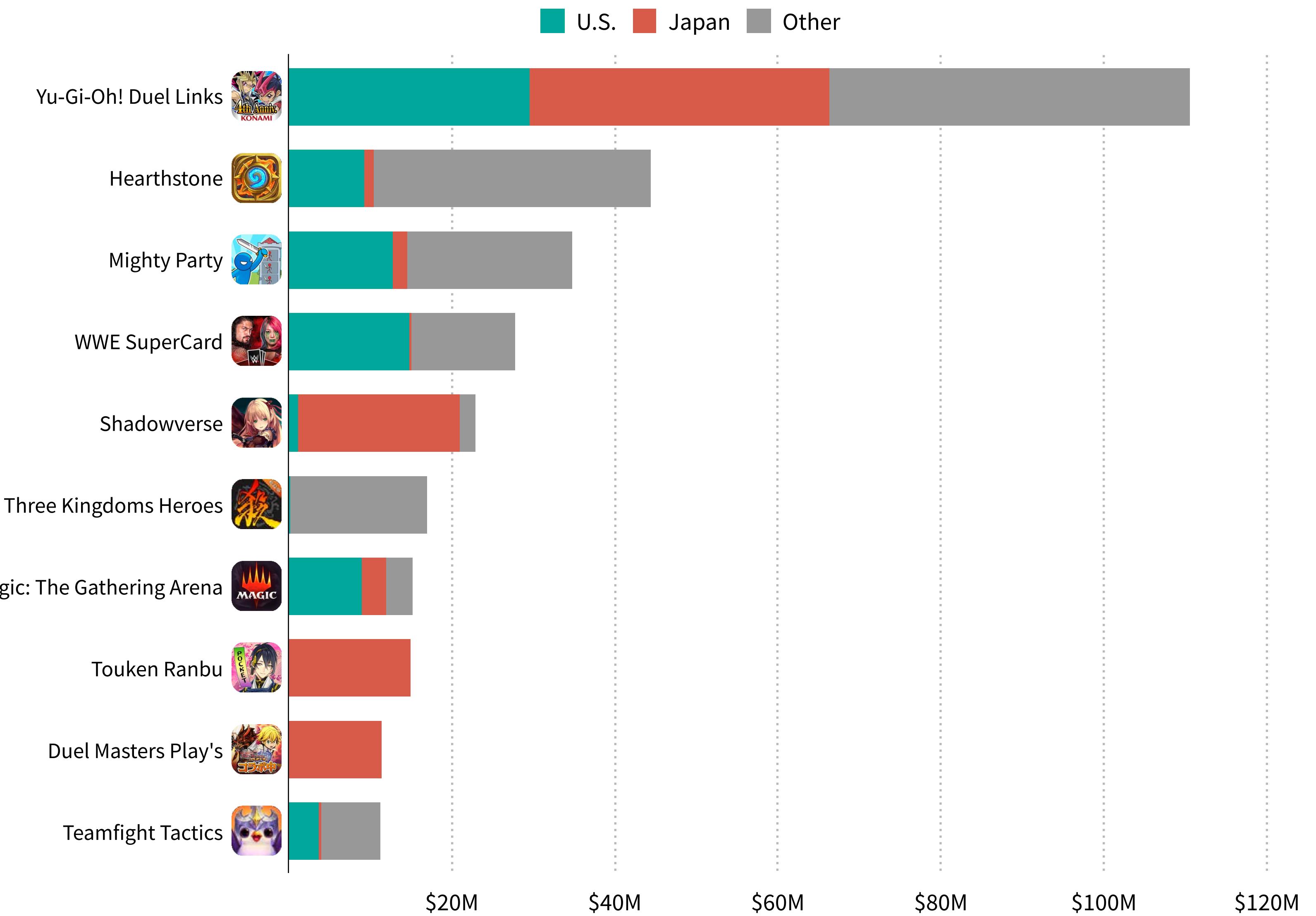


# Top Card Battler Games Worldwide

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Analysis of Top Titles by Revenue and Downloads

# Six Top Titles Generated Majority of their Revenue in Asia

*Top grossing titles by worldwide player spending in H1 2021*



**Yu-Gi-Oh! Duel Links** was the top grossing card battler in H1 2021, generating \$110 million in worldwide player spending. Japan accounted for 33 percent of revenue, while the U.S. represented 27 percent, making the title a global success.

Hearthstone ranked as the No. 2 game by player spending, generating more than \$40 million. The biggest market for this game was China (40 percent) followed by the U.S. (20 percent).

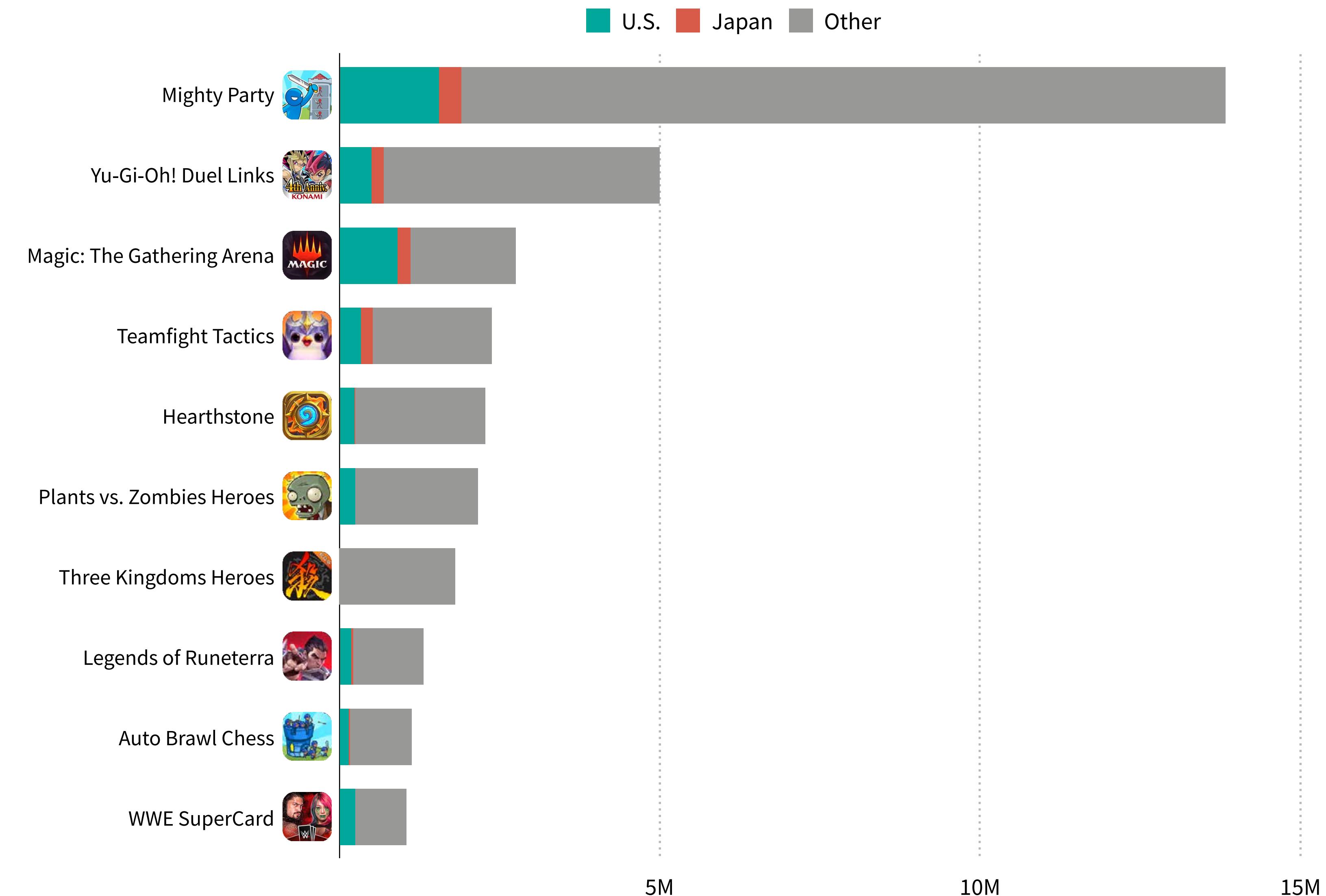
Both Yu-Gi-Oh and Hearthstone are considered forever franchises, as they were launched more than five years ago and generate consistent revenue. Since launch, Yu-Gi-Oh has accumulated more than \$700 million in player spending while Hearthstone is close to hitting the \$1 billion mark.

**Six out of the top 10 Card Battler games generated the majority of their revenue from Asian markets like Japan and China.**

Magic: The Gathering Arena was launched in March 2021. Within just three months of launch, the game already ranks among the top 10.

# New Contenders Emerge in the Card Battler Sub-Genre

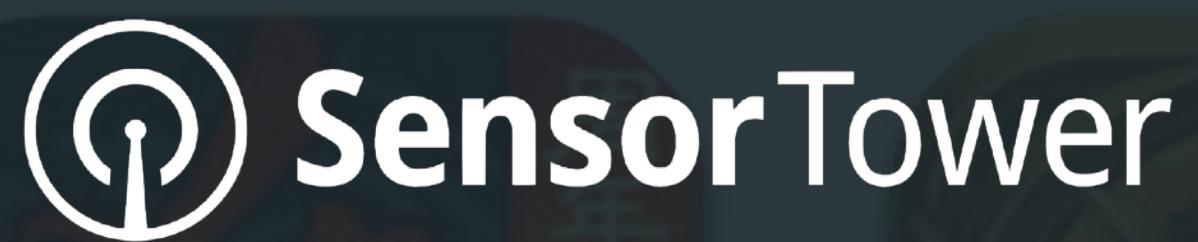
*Top titles by worldwide downloads in H1 2021*



**While a few forever franchises continue to generate significant installs, the 1H21 saw the emergence of a number of new titles on the top downloaded chart:** Mighty Party (released in 2018), Teamfight Tactics (2020), Legends of Runeterra (2020), Auto Brawl Chess (2020), and Magic: The Gathering Arena (2021).

Mighty Party topped the chart, generating more than 14 million downloads worldwide in H1 2021. The latest release in the sub-genre, Magic: The Gathering Arena, ranked No. 3, accumulating more than 3 million installs during the first half of the year.

While the U.S. and Japan are the top countries by revenue, they represent just a fraction of the global downloads.

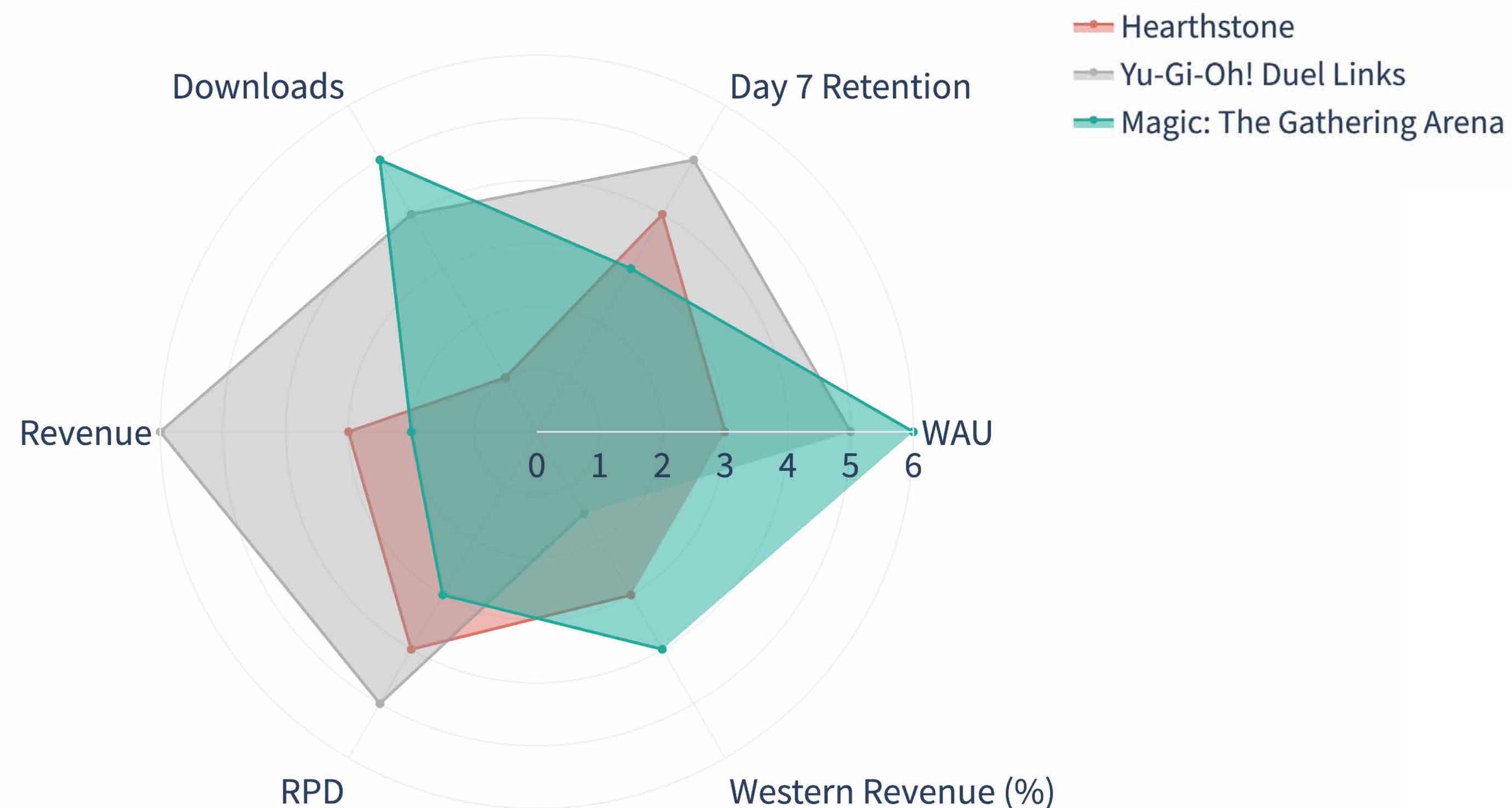


# U.S. Market Deep Dive

— Profile of the Top Grossing Titles

# Magic: The Gathering Arena Shakes Up the Market

*U.S. key performance indicators in H1 2021 among top tabletop Card Battler titles*



The top grossing tabletop card battlers in the U.S. leverage popular existing IPs: Yu-Gi-Oh, Wizards of the Coast's Magic: The Gathering Arena (MTGA), and Hearthstone, which is built on top of Blizzard's Warcraft universe.

Magic: The Gathering is a legacy trading card game originally released in 1993. By the end of December 2018, the company claimed to have 35 million players of the tabletop game.

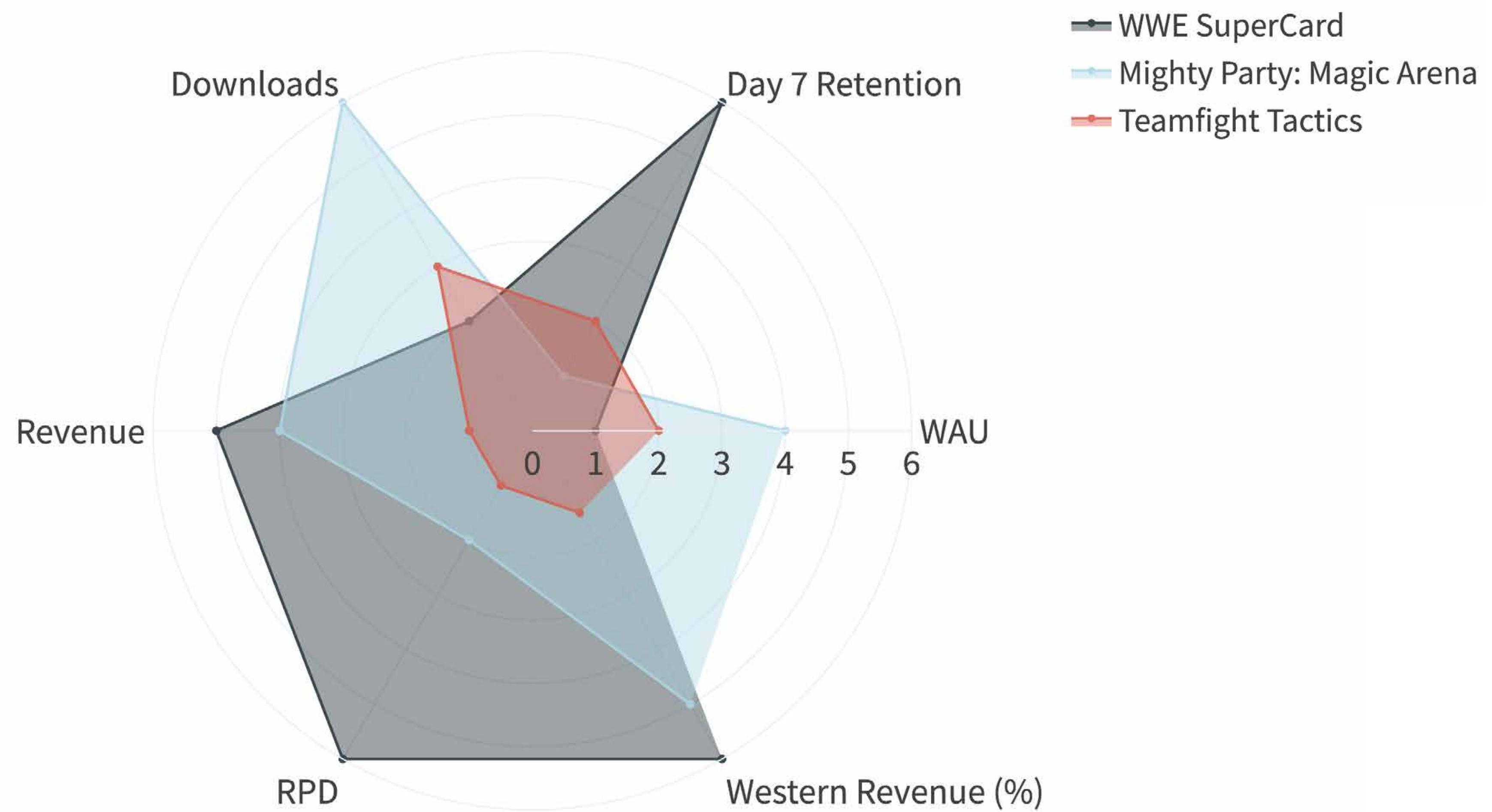
According to Hasbro's financial report, Magic: The Gathering made \$581 million in 2020 (27 percent Y/Y).<sup>1</sup> **Within just three months after launch, the mobile version of the game, MTGA, currently ranks No. 1 among Card Battlers for weekly active users (WAU).**

MTGA is the most Western-oriented tabletop title among this set of Card Battler releases. More than 75% of revenue comes from the U.S. and Europe, while Hearthstone and Yu-Gi-Oh generate more revenue in Asian markets.

<sup>1</sup>Source: Forbes

# Niche IP Offers Possibilities in the Market

*U.S. key performance indicators in H1 2021 among niche Card Battler titles*



The Card Battler sub-genre appears to be a good place for niche titles. WWE SuperCard, published by Take-Two Interactive and using the official WWE IP, has generated more than \$120 million in player spending to date in the U.S. **What's more, title generated significant revenue despite a relatively low number of weekly active users.**

Mighty Party is a Battle Chess game with a Stickmen theme. This title has the lowest retention among this set of titles but it ranks No. 1 by downloads.

# New Contenders Use More Active Marketing Strategies

*App Store advertising share of voice by network in the U.S. for H1 2021*



Forever franchises like Hearthstone, Yu-Gi-Oh! Duel Links, and WWE SuperCard were not very active in terms of marketing on the main ad networks during the first half of 2021.

Two games stand out in terms of share of voice among this set of titles, Mighty Party and Magic: The Gathering Arena.

**Magic: The Gathering Arena ranks No. 1 as the most active Card Battler game in terms of user acquisition.** Its marketing strategy is diversified across several major networks including YouTube, Unity, AdMob, Facebook, and Instagram. This broad marketing strategy points to an attempt to profitably scale the game via user acquisition.

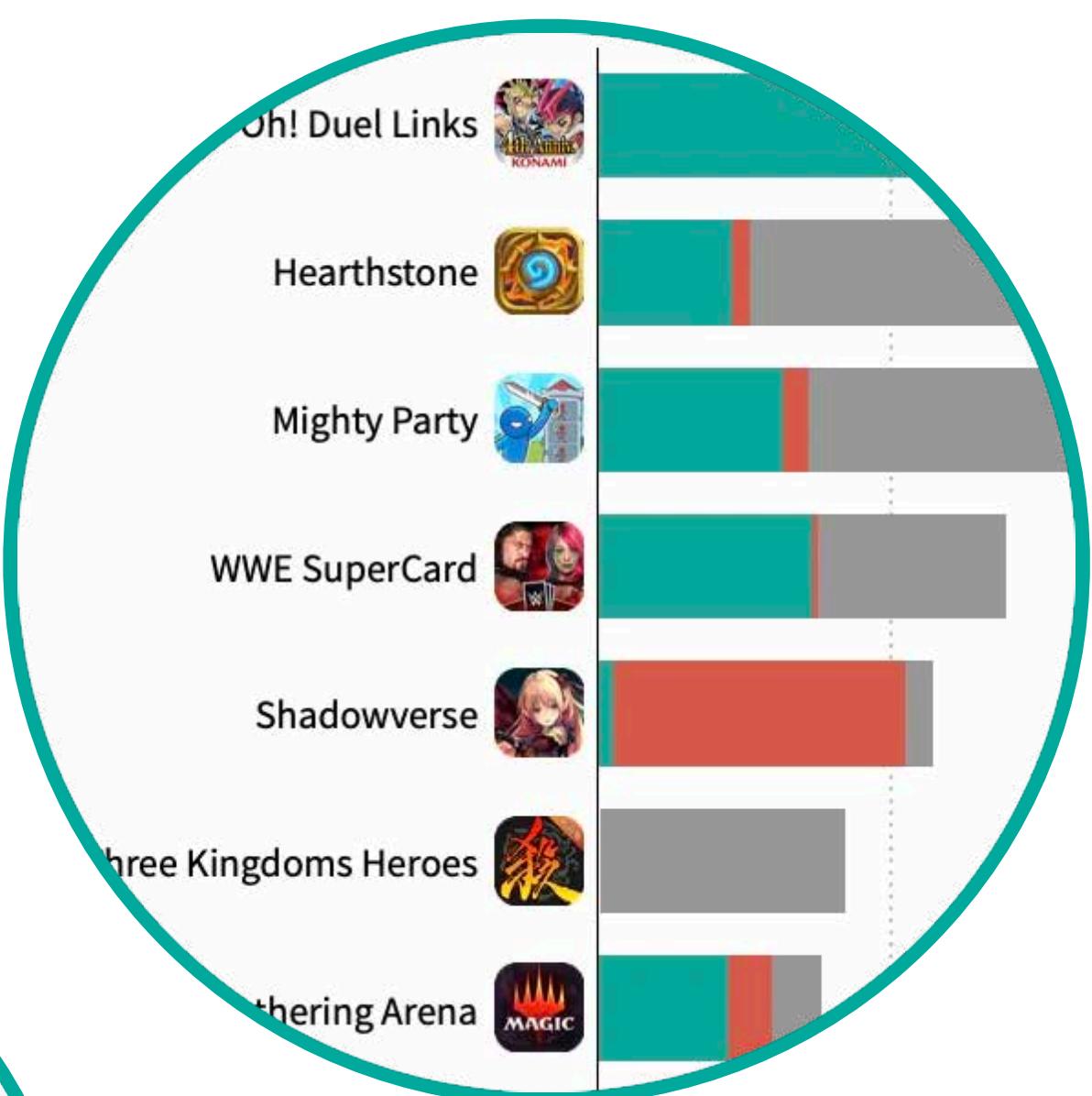
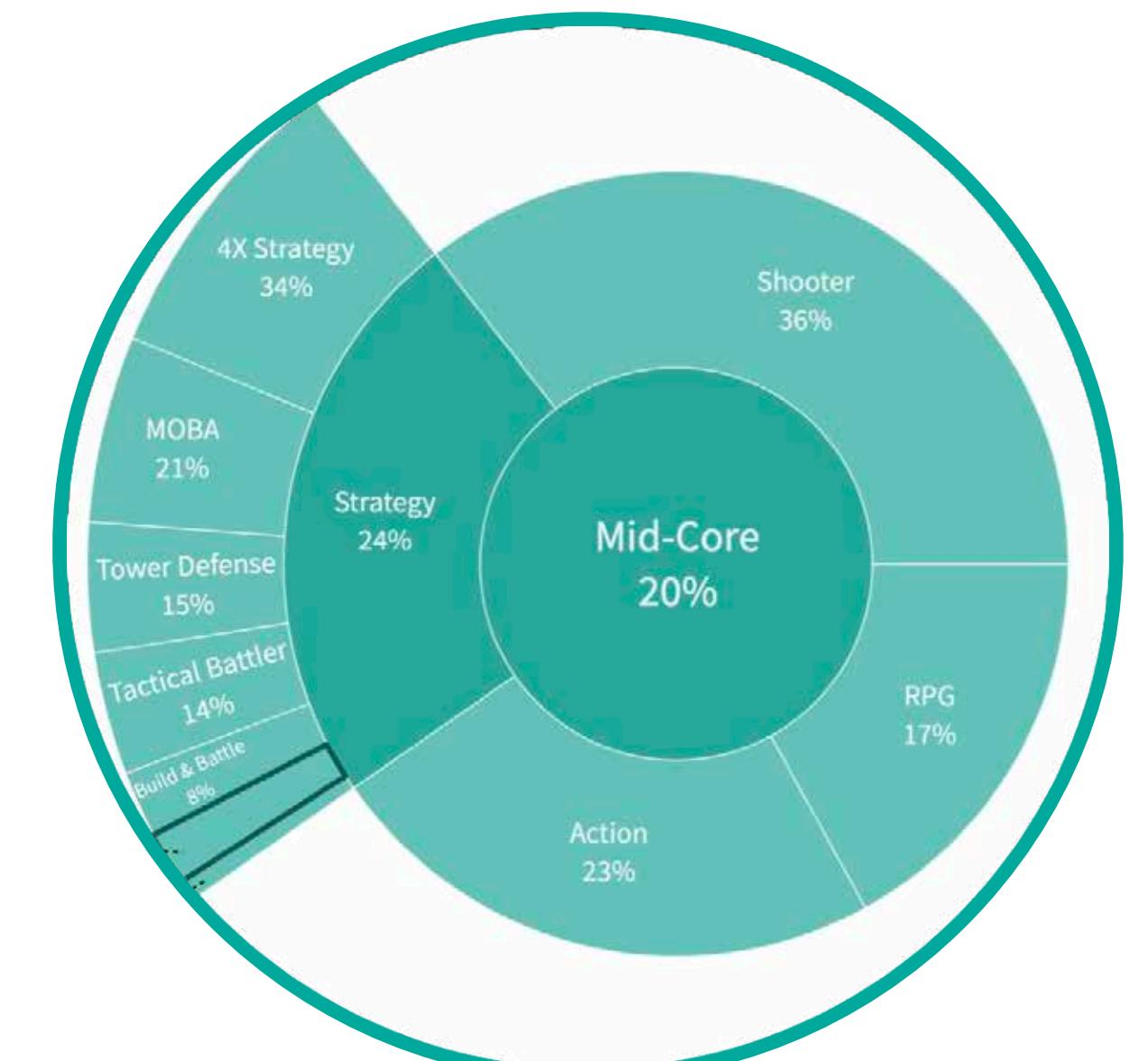
Mighty Party also had a strong presence across multiple Networks. Such active campaigns are part of the reason why the game ranked No. 1 for downloads in the sub-genre during the first half of 2021.



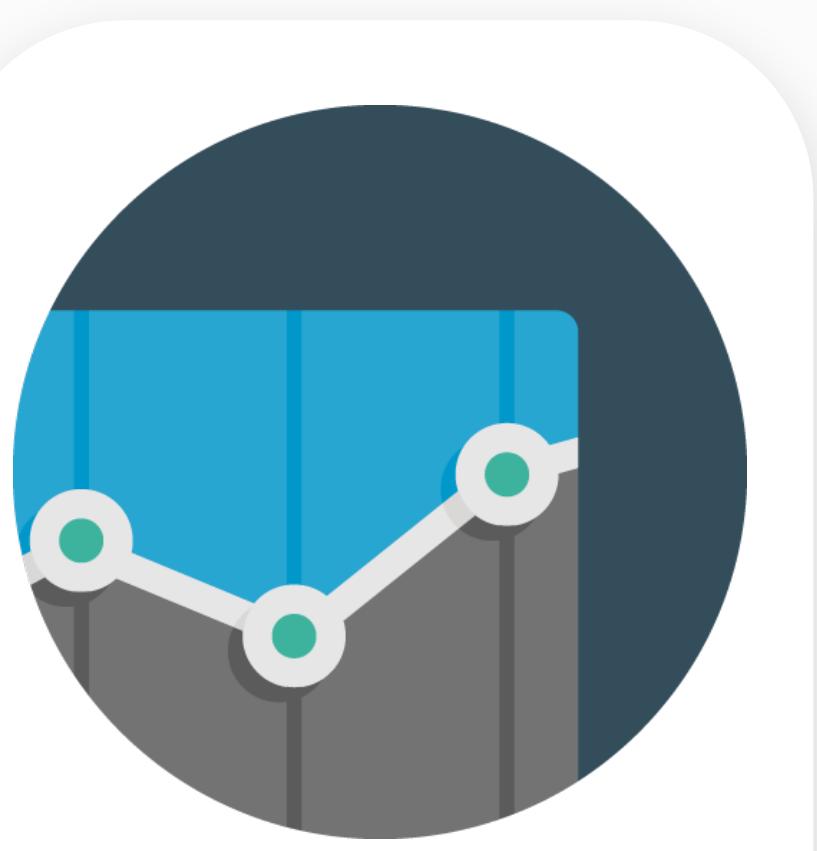
# Conclusion

# Conclusion

- The Card Battler sub-genre is relatively small when compared to 4X Strategy or MOBA. Nevertheless, it has seen strong growth in downloads during the last two years.
- During the first half of 2021, the U.S. has significantly increased its market share and now accounts for 27 percent of player spending in the sub-genre. This represents an increase of 6 percentage points from H1 2020.
- Six out of the top 10 Card Battler genre games generated the majority of their revenue from Asian markets like Japan and China.
- The top grossing tabletop Card Battler titles in the U.S. leverage popular existing IPs: Yu-Gi-Oh, Hearthstone (which is built on top of Blizzard's Warcraft universe), and Magic: The Gathering Arena.
- While a few forever franchises, such as Hearthstone and Yu-Gi-Oh! Duel Links, continue to generate significant installs, the first half of 2021 saw the emergence of a number of new titles in the top downloads chart. This suggests that the sub-genre has consumers willing to try new concepts.
- The Card Battler sub-genre appears to be a good place for niche titles as displayed by the success of WWE SuperCard and shows potential for other IPs in this market.

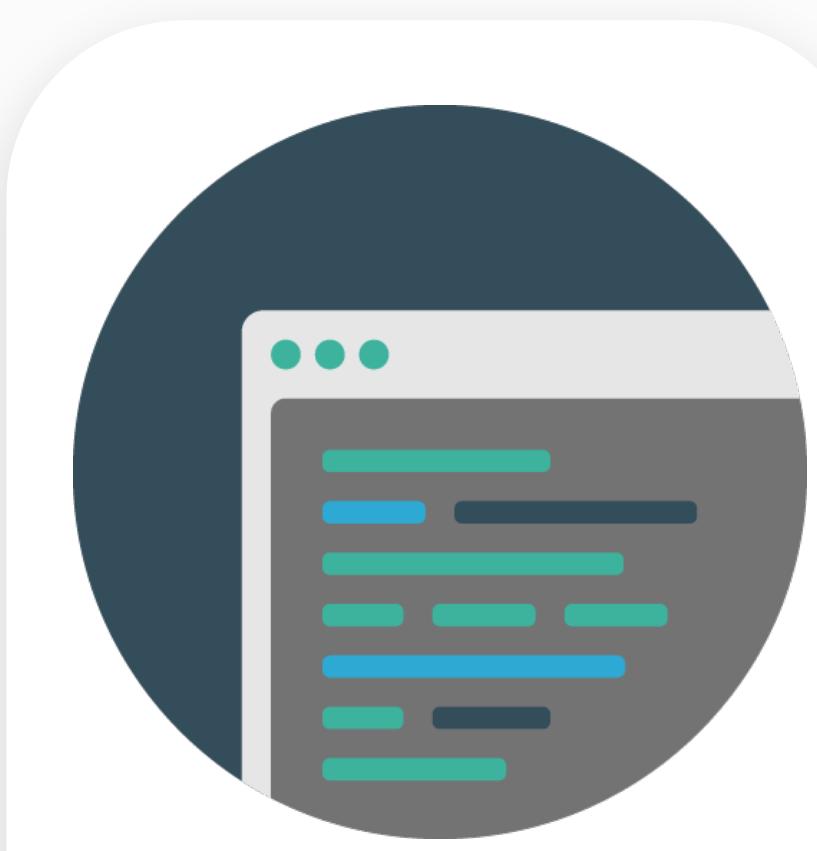


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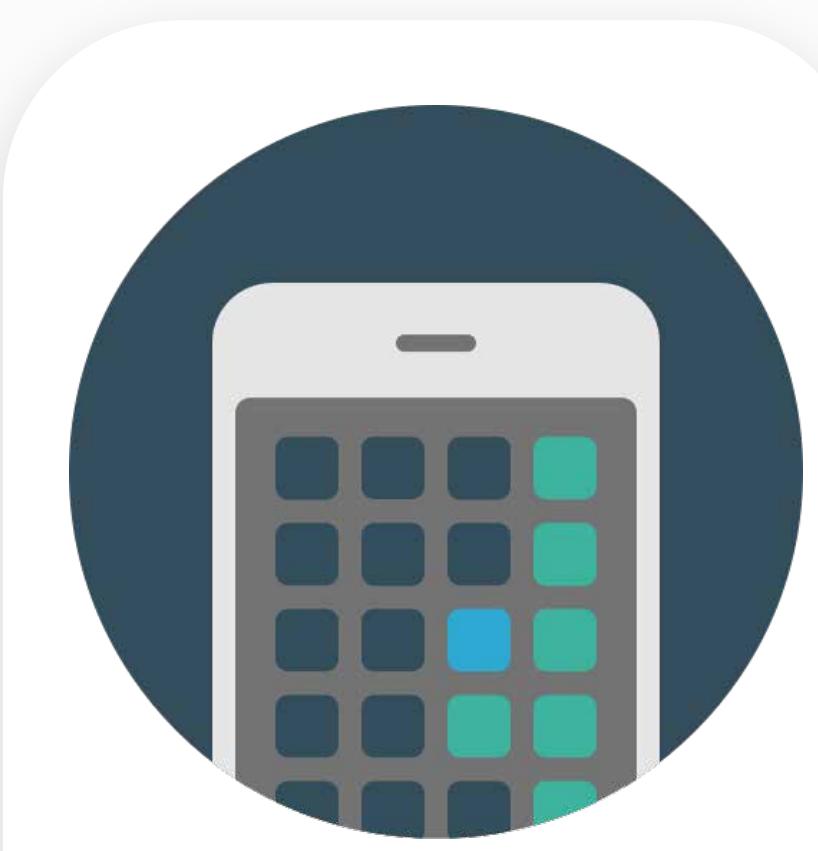
## App Intelligence

Drive organic growth with the leading App Store Optimization platform.



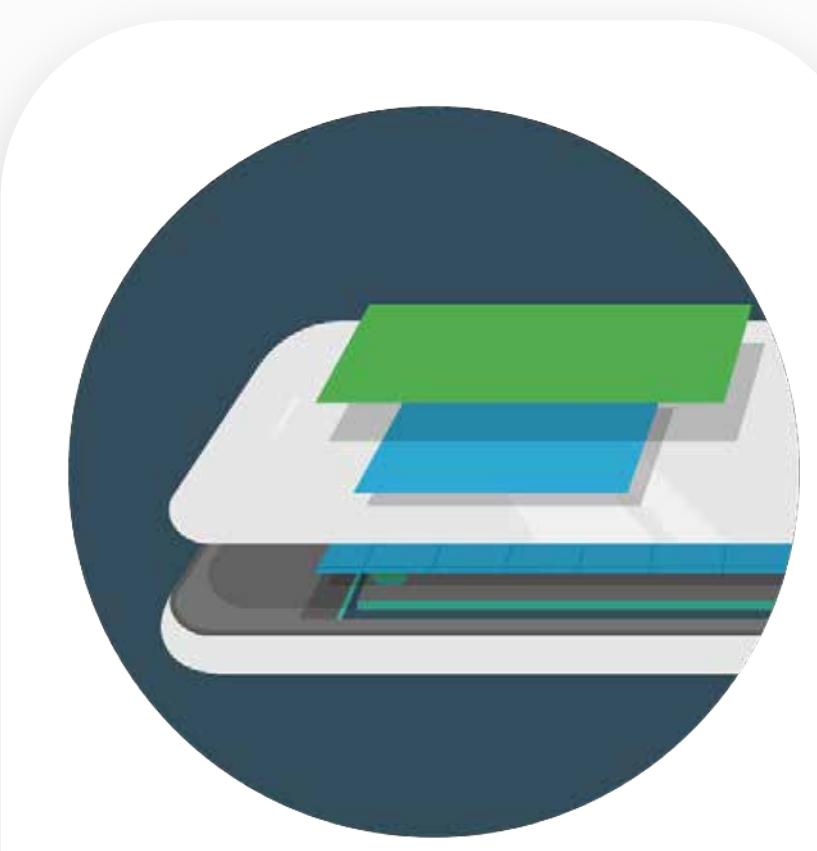
## Ad Intelligence

Develop winning User acquisition campaigns with crucial mobile advertising insights.



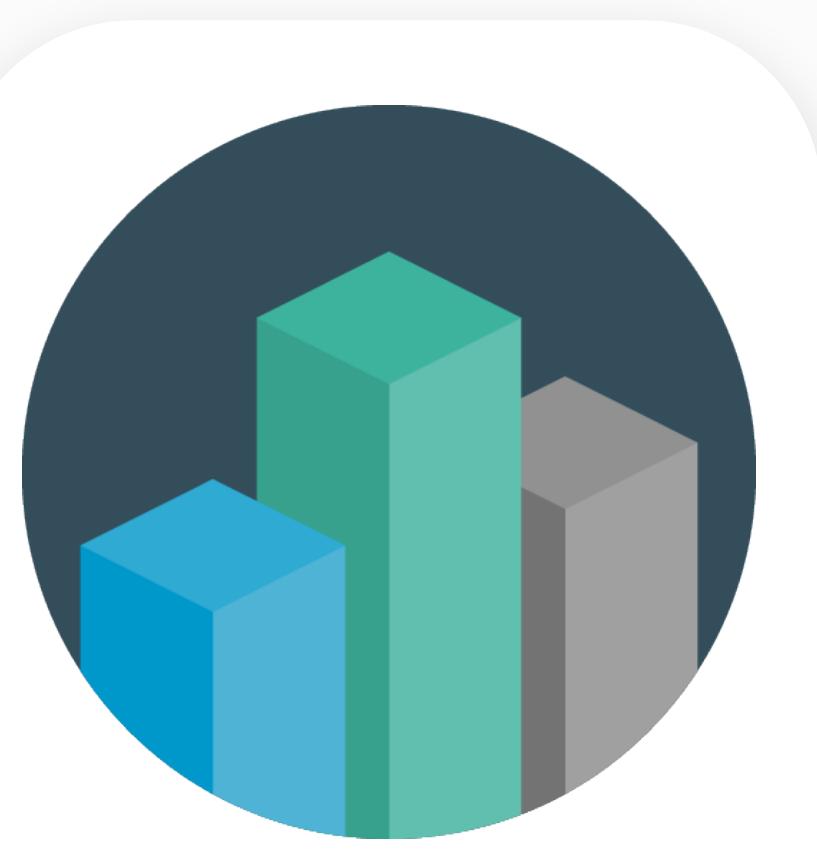
## Usage Intelligence

Benchmark app usage, engagement, and demographics.



## App Teardown

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



## Consumer Intelligence

Access unfiltered mobile user engagement for financial analysis.

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