



Five Key Mobile Game Genres in Asia and MENA

**A bulletin by Niko Partners in collaboration
with AppMagic**

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Introduction to the Bulletin

- This bulletin **“Five Key Mobile Game Genres in Asia and MENA” delivers strategic insights and guidance** on the profile of gamers that play games in these genres in Asia and MENA.
- Readers, such as developers, brands, publishers and more, will be able to use the data and insights in the bulletin to **make informed strategic decisions for better business outcomes** when targeting the player profiles.
- Niko Partners partnered with AppMagic for this bulletin.
- Niko’s proprietary data on the video games industry in Asia and MENA & AppMagic’s mobile game data analytics led to the **most important mobile game genres, and we scored them and provided insights for you to use in your own company’s analysis.**



Leveraging unmatched local expertise with a global perspective, Niko Partners delivers the most in-depth video game market intelligence for Asia and MENA, the world’s fastest-growing regions. With our deeper understanding of these complex markets, game developers, publishers, investors, and suppliers can make smarter business decisions with the utmost confidence.

APPMAGIC

AppMagic is a mobile market intelligence tool: we offer detailed statistics of Apple App Store and Google Play Store top charts, estimations of app revenues and downloads in these markets, and a whole set of tools for mobile market research. We collect public information from Apple and Google mobile application stores altogether with additional information provided by a number of mobile app publishers (such as Revenue and Downloads for their apps).

Methodology



Niko Partners

- Niko Partners tapped into its robust survey data collected in 2022 which included thousands of samples across the Asia and MENA region.
 - Our 2022 survey was taken by 9,000 gamers across China, Chinese Taipei, Egypt, India, Indonesia, Japan, Korea, Malaysia, Philippines, Saudi Arabia, Singapore, Thailand, UAE, and Vietnam.
 - The survey was delivered to respondents in both English and local language. Individuals were screened for inclusion based on spending a minimum of playing games for 60 minutes in the last 30 days.
- We arranged the survey questions within four unique categories to build a player profile for each genre.
- The genres were assigned a score for each question, relative to the overall performance of each genre.



AppMagic

- AppMagic provided Niko Partners with key data and insights from its mobile game analytics platform to supplement the survey data.
- AppMagic data was used to confirm that the top 5 genres we selected accounted for a significant percentage of spend in 2022.
- This included 2022 data for genre level revenue, downloads and revenue per download across the Asia and MENA region.
- The company also provided insights on the top games in these genres which were matched with our survey results to build a robust games taxonomy for this bulletin.
- AppMagic's data was combined with Niko Partners survey data to introduce additional metrics that were used to calculate final category scores and build out the player profiles for each genre.

Ranking the Mobile Game Genres

- The focus of this bulletin is on 5 key mobile game genres: **RPG, Strategy, MOBA, Puzzle** and **Battle Royale**, which cumulatively accounted for nearly 80% of mobile game spend in the Asia & MENA region during 2022.
- Niko Partners analyzed its survey data to create player profiles for the key mobile game genres that provide a relative performance comparison.
- Niko Partners and AppMagic collaborated to enhance the accuracy and relevance of the research findings by combining Niko's survey data with AppMagic's mobile game analytics to rank the genres across four different categories.
- Genres were evaluated across 21 unique metrics derived from Niko and AppMagic proprietary data to create scores that were then aggregated across the four categories of monetization, engagement, esports, and appeal to create overall category scores.
- The genres were scored between 1-10 for each metric and category, with 1 indicating weak performance and 10 indicating high performance.
- A final genre score between 1-10 was then calculated by using a weighted average of the four category scores, providing an approximate value of how each genre performs relative to each other.

Category Scores	Description
Monetization Score	This aims to measure how well a particular genre is able to monetize. We used total spend data, average spend per user, income level, in app purchase ratios and other metrics to calculate the score
Engagement Score	This aims to measure how active and loyal players of the genre are. We used average hours played per week, player lifespan of individual games, total downloads and other metrics to calculate the score
Esports Score	This aims to measure how much esports appeals to players of the genre. We used esports viewership data, esports attendance, esports engagement and aspirations to compete in esports to calculate the score
Appeal Score	This aims to measure how likely the genre is to appeal to a wider audience. We analyzed age and gender distribution as well as game satisfaction levels and other metrics to calculate the score
Genre Score	An average score of the four metrics above, measuring an approximate value of how each genre performs across the four areas

Top Games for Each Genre in 2022

RPG



Uma Musume Pretty Derby



Genshin Impact



Lineage W



Fate/Grand Order



FWJ Mobile

Strategy



Three Kingdoms: Tactics



Clash of Clans



Rise of Kingdoms



State of Survival



Top War

MOBA



Honor of Kings



Mobile Legends



LoL: Wild Rift



Brawl Stars



Pokémon Unite

Puzzle



Candy Crush Saga



Royale Match



Homescapes



Gardenscapes



Anipop

Battle Royale



PUBG Mobile



Free Fire



Knives Out



Sausage Man



New State

Executive Summary

1

RPG is the #1 genre based on overall genre score, ranking highly across the four different metrics.

RPG has the highest score for monetization, engagement, and appeal, with it having the second lowest score for esports.

The genre, including its sub genres, continues to dominate mobile ranking charts, especially in South Korea where RPG accounted for 75% of core game revenue in 2022.

Most notably, players of RPG games have the highest average annual income and a more equal gender distribution than other genres.

2

Battle Royale is the #1 genre for esports, with its genre score 3x that of the puzzle genre.

While both Battle Royale and MOBA rank highly in terms of the number of esports tournaments and prize pools, the Battle Royale genre beats MOBA when it comes to other esports metrics such as viewership.

While the market has experienced some turbulence due to oversaturation and regulation, which led to the shutdown of *Apex Legends Mobile*, and the ban of *BGMI* and *Free Fire* in India, there remains an opportunity for non-shooter battle royale games and casual competitive battle royale games.

3

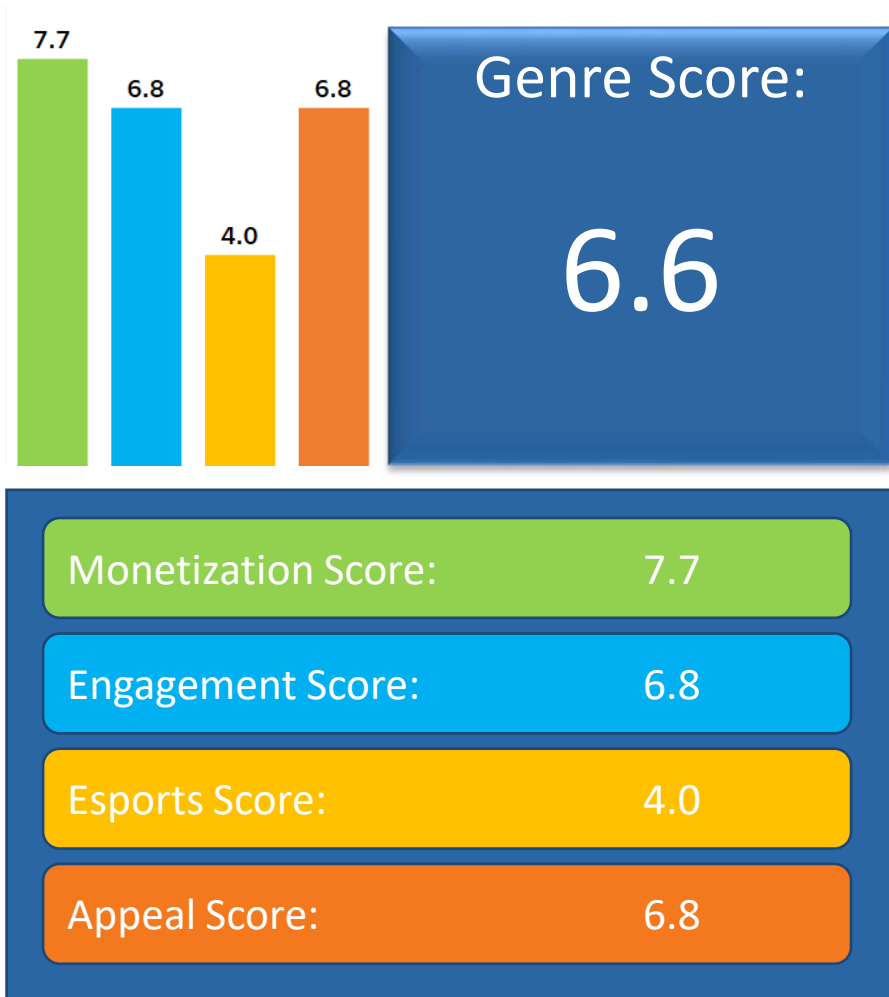
The strategy, puzzle and MOBA genres still have their merits despite not ranking #1 by any of the metrics.

Players of strategy games are the least likely to be dissatisfied with the games they are playing and are the most likely to try a new game in the same genre.

Players of puzzle games are the most likely to value localization and the genre ranks #1 for overall downloads.

Players of MOBA games rank #1 for hours played per week and exhibit higher levels of loyalty and stickiness than other genres.

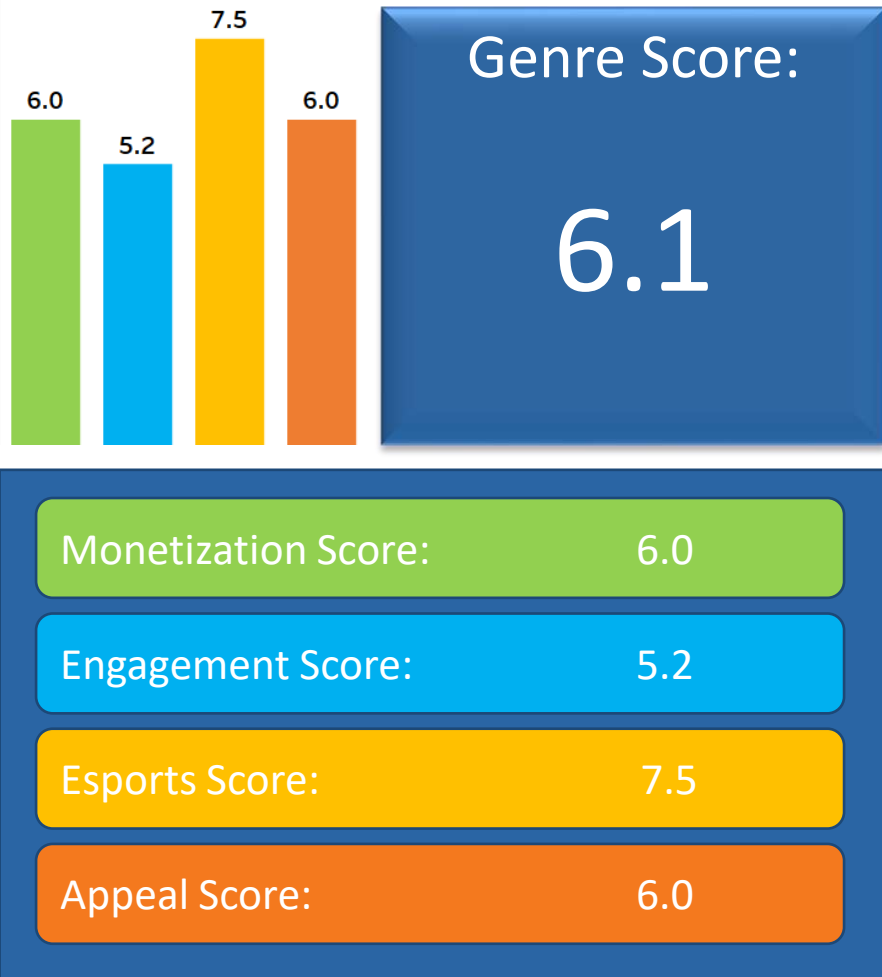
RPGs Generate the Most Revenue in Asia + MENA



An overview of Role-Playing Games on mobile:

- RPG is the **largest genre by revenue in Asia & MENA** with total spend in 2022 more than 50% higher than combined spend from the other four genres covered in this bulletin.
- RPGs have the **highest revenue per download of all genres**, primarily due to high spending in East Asian countries, which contributed to it having the highest monetization score of the genres covered in this bulletin.
- RPG also has the **highest engagement score** of the genres covered in this bulletin with high downloads and downloads per gamer. However, it does fall short on overall longevity, with other genres such as MOBA and battle royale having a longer average lifespan.
- RPG **falls short on esports**, primarily because most RPG games do not have a competitive esports component, but also because players of RPG games are less likely to stream esports events, aspire to compete in esports, or attend esports events in person.
- The genre has a high appeal score as it is **more likely to appeal to both male and female** gamers than other genres. While the genre still skews in favor of male gamers (61%), this is lower than other genres that can skew 70% or higher in favor of male gamers.
- RPG is a very broad genre on mobile that **encompasses multiple sub-genres**. While puzzle RPGs continued to dominate in 2022, several new action RPGs witnessed strong performance during the year too.

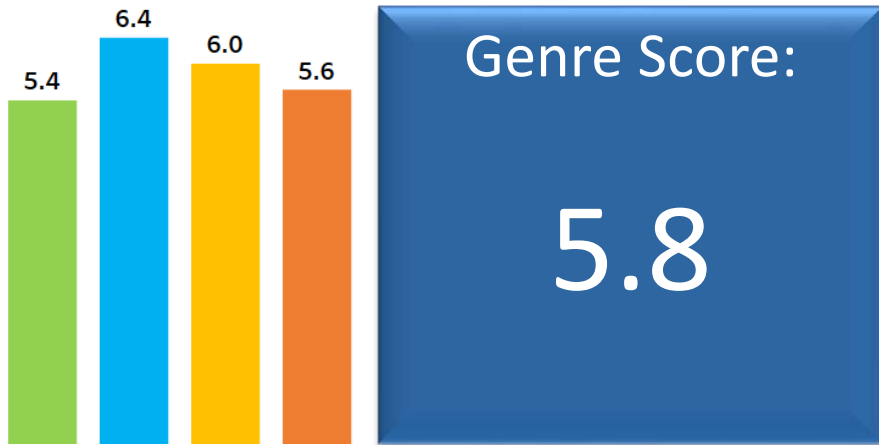
Strategy Gamers Are Willing to Engage with Esports



An overview of Strategy games on mobile:

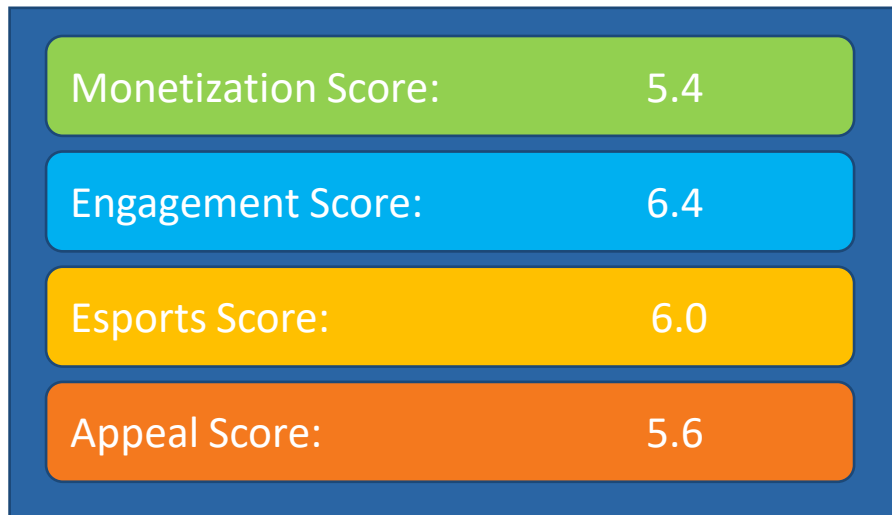
- Strategy is the **second largest genre by revenue** covered in this bulletin and the **third largest for downloads**. However, it ranks second last for revenue per download.
- Strategy has an **above average monetization score** due to its revenue ranking and percentage of players that make in game purchases.
- The genre has the **lowest engagement score** of the genres covered in this bulletin, primarily due to low longevity of titles and average hours played per week. Gamers play strategy games for an average of 5.1 hours a week compared to 6 hours for MOBA gamers, which ranks #1.
- Interestingly, the strategy genre has a **high esports score** among players. 65% of strategy games are a fan of esports and players of this genre are more likely to attend esports events in person and aspire to compete in esports at a professional or amateur level.
- Strategy has the **second highest appeal score** of the genres covered in this bulletin. Players are the least likely to be dissatisfied with the game they're playing and the most likely to try new games in the same genre.
- The genre **performed strongly in Asia and MENA** during 2022, while seeing **declines in the West**. Innovation within the strategy genre, which involves combining traditional gameplay with new sub genres, has helped the genre remain engaging for players.

MOBA Has the 2nd Highest Revenue per Download

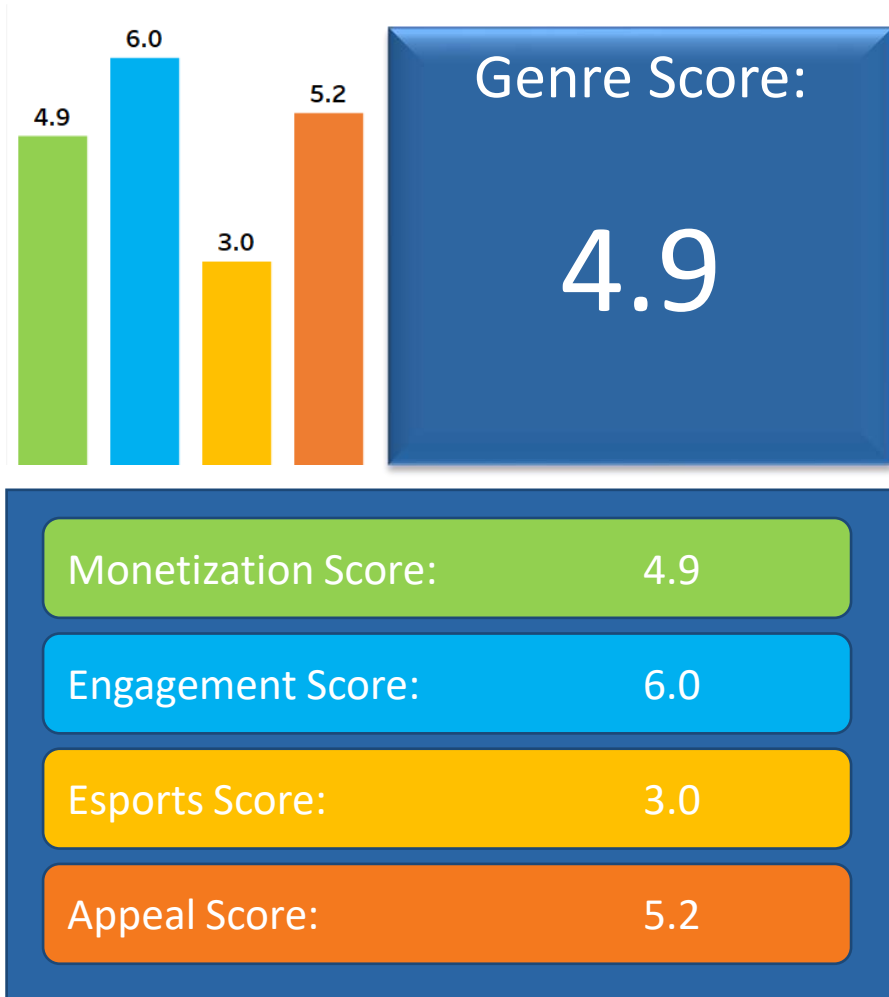


An overview of Massive Battle Online Arena (MOBA) games on mobile:

- The MOBA genre continues to excel in Asia and MENA, especially when compared to Western markets, and has the **second highest revenue per download of the genres** covered in this bulletin.
- While the **high revenue per download** and **high total spend** contributes to **boosting its monetization score**, players of this genre tend to earn less income than players of other genres and spend less on gaming overall.
- MOBA has a **high engagement score** as it ranks #1 for average hours played per week (6 hours) and player lifespan.
- Despite its dominance across mobile esports in terms of number of tournaments, total prize pools, and medium to high scores across esports metrics, MOBA gamers are the **least likely to attend in person esports events**, which drags its esports score down.
- MOBA games have **the youngest player base** of the genres covered in this bulletin and have a **more equal distribution of male and female players** compared to battle royale and strategy players.
- MOBA is a tough genre to crack due to **the dominance of a few titles in the region**. In addition, existing MOBA gamers are extremely loyal to their preferred game, being least likely to play another game within the MOBA genre.



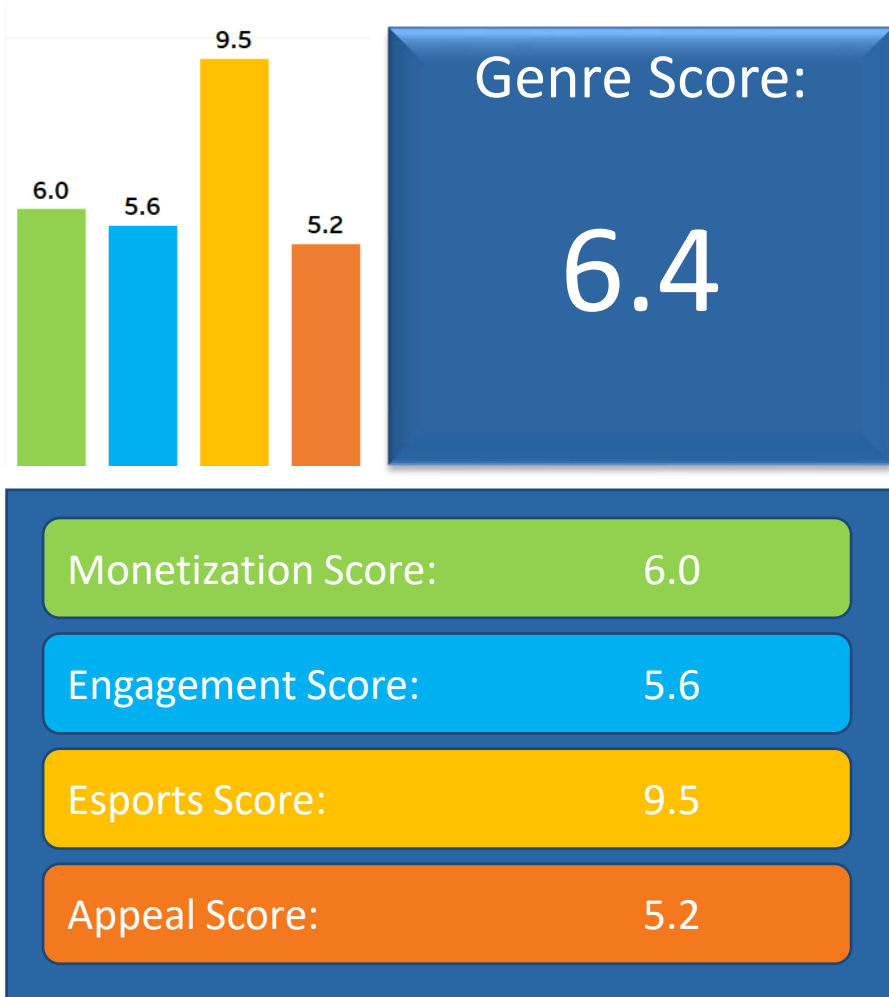
Puzzle Has High Downloads and Engagement



An overview of Puzzle games on mobile:

- The puzzle genre is the **largest by downloads** of the genres covered in this bulletin, but has the lowest revenue per download.
- The **low average spend** contributes to the weak monetization score, along with a **low percentage of in-game spenders**. However, players of puzzle games are more likely to have a higher average income than players of other genres except for RPG players.
- Puzzle has a **high engagement score**, primarily driven by a high number of total downloads and downloads per gamer. However, puzzle gamers are the least engaged in terms of hours played with an average of 3.9 hours played per week.
- The genre has a **low esports score** due to a lack of engagement and mobile esports tournaments involving puzzle games. Players of puzzle games are the **least likely to be fans of esports**, stream esports events online, and aspire to compete in professional or amateur esports tournaments.
- While puzzle has a **low appeal score** comparatively, it has a **more even split of male and female gamers** than all other genres in the bulletin except RPG. Puzzle games are more likely to **appeal to older gamers**, with the genre having the oldest average age of players.
- Innovation within the puzzle genre has seen **sub-genres such as merge** perform well in 2022. Puzzle gamers in Asia and MENA are more likely to **value localization** than players of other genres.

Battle Royale Ranks #1 for Mobile Esports



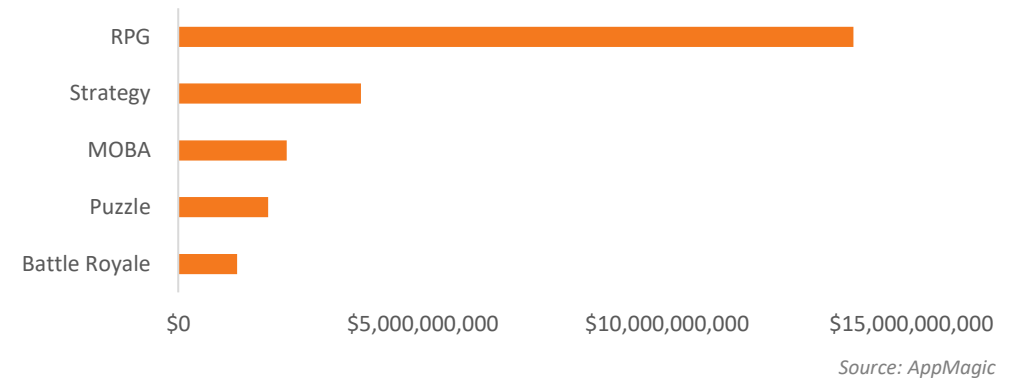
An overview of Battle Royale games on mobile:

- The Battle Royale genre has seen **tremendous growth on mobile** since 2018 and has established itself as a core genre.
- At 6.0, Battle Royale has the **average monetization score** of the genres covered in this bulletin. With 55.1% of players having purchased in-game items in the past year, it ranks #1 in this category. However, its total revenue is the lowest of the genres covered in this bulletin.
- **Engagement is high** in terms of average hours played per week and player longevity, but the genre falls short across other metrics measured.
- Battle Royale is a **leading genre for mobile esports**. Players are the most likely to stream esports tournaments online, watching an average of 2.5 hours of esports content per week. They are also most likely to aspire to compete at a professional or amateur level. 60.2% of Battle Royale players consider themselves to be fans of esports.
- The genre has narrow appeal comparatively, as it is **more likely to appeal to male players than female players** by a notable margin, and because players are **more likely to be dissatisfied** with the game they are playing.
- The **market for shooter battle royales has become oversaturated** but an opportunity remains for non-shooter battle royale games and battle royale mechanics in casual competitive titles.

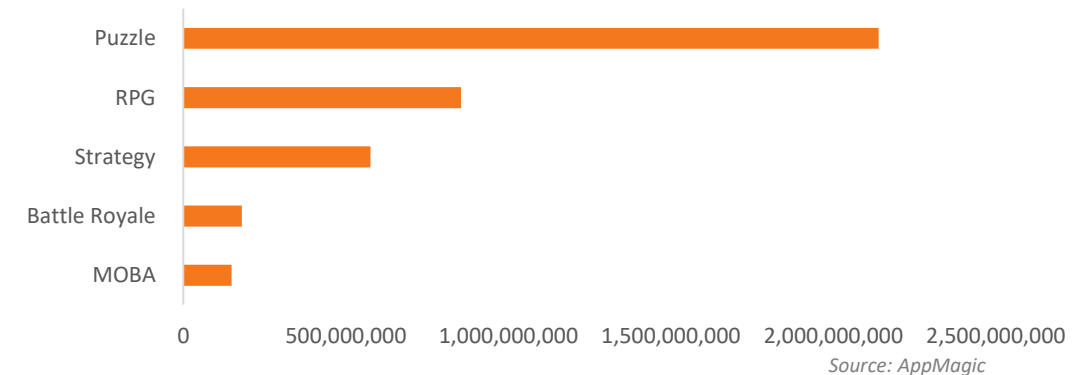
Key Takeaways From the Bulletin

- The combination of Niko Partners and AppMagic data in this bulletin provides readers with an overview of player profiles for 5 key genres in the Asia and MENA region, which are critical insights for firms looking to target players of each genre.
- The most dominant genres in the Asia and MENA markets are **RPG** by revenue and **Puzzle** by downloads.
- RPG is **the most diverse genre**, appealing to a wide number of gamers, driving high levels of loyalty, and is highly monetizable.
- Strategy gamers **are the least dissatisfied with the games they play**, and they are more willing to try new genres, games and mechanics.
- MOBA gamers **are the most loyal group** in this bulletin. Once they have a preferred game, they are fiercely loyal and most likely to stick with it for an extended period of time.
- Puzzle gamers **are open to trying new games** and are likely to download multiple games.
- Battle Royale gamers **are highly engaged with esports** in terms of watching esports online, attending tournaments in person, and aspiring to compete in esports events.

Mobile game revenue by genre in Asia & MENA (2022)



Mobile game downloads by genre in Asia & MENA (2022)



For more information on the **mobile games market in Asia and MENA**, here are our suggestions:



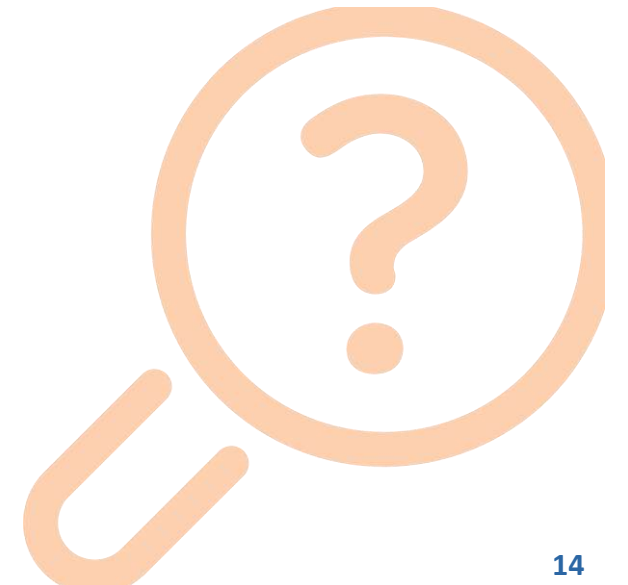
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About Niko

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- Transaction advisory services
- Investor due diligence
- News analysis service
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