



Market Snapshot

Q2 2021 US, China & Japan

July 2021



GameRefinery uses a three-layered approach to categorize games

- Using a **Category → Genre → Subgenre** hierarchy we are able to differentiate games in a meaningful way and offer accurate insights for all individual game types currently found in the market
- Our taxonomy is **created together with industry experts** and is based on thorough testing and data-analysis of the market



GameRefinery's Genre Taxonomy

Short Q2 2021 Market Overview



Joel Julkunen
VP of Games

This quarter we're seeing slight but interesting shifts in the mobile games market.

Looking at the genre level, we see that in the US, the Strategy genre is gaining more ground now, nearly neck and neck with Puzzle and Casino, while in Japan, Sports continues to take even more market share. China sees a bit of a trend reversal vs. Q1 with staple genres RPG and regaining some lost market share while shooters see a decline.

Supercell saw its strongest quarter in a while, surpassing King in terms of market share driven by the performance of Clash of Clans and Clash Royale. The growth of the Sports genre in Japan can in great part be credited to Cygames, who continues to rock the charts with Umamusume Pretty Derby taking up over 9% of Japan's market share.

As a first for a Snapshot report, in this report, we take a look at differences between game updates YoY. We're seeing a 37% increase in the number of feature updates, partly driven by genres such as Strategy (208% increase), where those investments are clearly translating into a growing market share.



Key points



Joel Julkunen
VP of Games



- In the US, we see that the Puzzle genre has lost market share while Strategy has grown the most. RPG games continue to lose Market Share in Japan while Sports sees a further significant increase in Market share. In China, we essentially see a trend reversal vs. Q1 with staple genres RPG and regaining some lost market share while shooters see a decline.
- Supercell had a strong quarter driven by the performance of Clash of Clans and Clash Royale. Cygames continues to rock the charts with over 9% of Japan's market share. Leiting Games nearly doubles its market share in China.
- We're seeing an increasing cadence of feature updates in games with a 37% increase YoY. Live Events – Non-Recurring and Limited IAP offers are the two features that see the most increasing frequency of updates YoY with 143% and 122% increases respectively. More and more games are leveraging these for player engagement and monetization, particularly when it comes to Puzzle, RPG, and Strategy genres.
- Looking at what player archetypes mobile games in the US top 200 grossing most appeal to, the situation in Q2 2021 is much the same as it has been for the past few quarters. Archetypes that associate with fast passed action and competing against other players continue their triumph. King of the Hill regains its #2 spot with Skill Master and most highly appealing archetypes seeing a slight dip as games that appeal to other archetypes gain ground in the charts.

Market

- Genre market share US, JP, CN
- Publisher share and top growth US, JP, CN
- Hot games in Soft Launch worth keeping an eye on



Market performance Q2 2021 vs. Q1 2021 (iOS)

Key takeaways: 1) In the US, we see that the Puzzle genre has lost market share while Strategy has grown the most. 2) RPG games continue to lose Market Share in Japan while Sports sees a further significant increase in Market share. 3) In China, we essentially see a trend reversal vs. Q1 with staple genres RPG and regaining some lost market share while shooters see a decline.



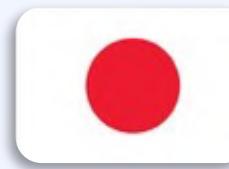
Genre	Rev	Change
1. Puzzle	21.18%	-1.53
2. Casino	18.9%	-0.31
3. Strategy	17.17%	+1.73
4. RPG	14.23%	+0.2
5. Simulation	10.4%	-0.52
6. Shooter	5.56%	+0.24
7. Lifestyle	3.86%	-0.02
8. Sports	3.4%	+0.29
9. AR/Location Based	1.67%	-0.75
10. Driving	1.6%	+0.31
11. Arcade	1.34%	+0.2
12. Card Games	0.62%	+0.13
13. Hyper Casual	0.06%	+0.04

Genre	Rev	Change
1. RPG	44.21%	-4.96
2. Sports	15.99%	+3.41
3. Strategy	10.7%	+1.09
4. Lifestyle	7.22%	+0.59
5. Puzzle	6.6%	-0.17
6. AR/Location Based	4.72%	-0.17
7. Shooter	4.54%	+0.27
8. Simulation	2.51%	+0.26
9. Card Games	1.23%	-0.05
10. Casino	0.88%	-0.26
11. Arcade	0.74%	+0.02
12. Driving	0.43%	-0.07
13. Hyper Casual	0.17%	-0.03

Genre	Rev	Change
1. RPG	47.33%	+2.02
2. Strategy	27.28%	+1.79
3. Shooter	10.46%	-2.73
4. Casino	5.4%	+0.05
5. Puzzle	2.03%	-0.03
6. Lifestyle	1.43%	-0.09
7. Sports	1.42%	-0.15
8. Driving	1.27%	-0.15
9. Arcade	1.2%	-0.5
10. Simulation	0.94%	+0.33
11. Card Games	0.93%	-0.27
12. AR/Location Based	0.03%	-0.02
13. Hyper Casual	0%	-0.03

Publisher performance Q2 2021 vs. Q1 2021 (iOS)

Key takeaways: 1) Supercell had a strong quarter driven by the performance of Clash of Clans and Clash Royale 2) Cygames continues to rock the charts with over 9% of Japan's market share. 3) Leiting Games nearly doubles its market share in China.



Top Publishers	Share	Change	Most Growth	Share	Change
1. Roblox	5.04%	-0.48	1. Supercell	4.35%	+1.46
2. Supercell	4.35%	+1.46	2. Dream Games, Ltd.	0.7%	+0.63
3. King	4.15%	-0.39	3. Lilith Games	1.66%	+0.35
4. Playrix	3.74%	-1	4. Autonoma	0.5%	+0.32
5. Scopely	2.24%	+0.07	5. Sony Pictures Television	0.29%	+0.27
6. Zynga	2.1%	+0.01	6. Garena International	1.59%	+0.26
7. Playtika	1.93%	-0.13	7. 37GAMES	0.78%	+0.18
8. Product Madness	1.74%	+0.02	8. Com2uS Corp.	0.67%	+0.16
9. Peak Games	1.67%	-0.31	9. Riot Games	0.19%	+0.16
10. Lilith Games	1.66%	+0.35	10. Wizards of the Coast	0.17%	+0.15

Top Publishers	Share	Change	Most Growth	Share	Change
1. Cygames	9.25%	+3.57	1. Cygames	9.25%	+3.57
2. KONAMI	7.34%	-17	2. XFLAG	5.72%	+1.02
3. SQUARE ENIX	6.28%	-0.63	3. 37GAMES	0.59%	+0.43
4. XFLAG	5.72%	+1.02	4. Happy Eler	1.95%	+0.37
5. BANDAI NAMCO	5.51%	-1.93	5. Netmarble	1.24%	+0.32
6. NetEase Games	4.93%	+0.25	6. ZigZaGame	0.47%	+0.3
7. Aniplex	3.63%	-11	7. Nexters Global	0.43%	+0.26
8. GungHo Online	3.61%	-0.85	8. NetEase Games	4.93%	+0.25
9. LINE	2.72%	-0.01	9. NCSOFT	0.27%	+0.22
10. SEGA	2.37%	+0.11	10. Shanghai Moonton Tec	0.28%	+0.2

Top Publishers	Share	Change	Most Growth	Share	Change
1. Tencent	39.45%	-2.8	1. Leiting	4.28%	+2.09
2. NetEase	15.09%	-1.21	2. Beijing Zhaoxiangnian	1.84%	+1.75
3. Lingxi Games	5.11%	+0.27	3. Guangzhou 37WAN	1.54%	+1.32
4. Leiting	4.28%	+2.09	4. Shanghai Hode	1.18%	+0.97
5. Shanghai Lilith	2.89%	+0.12	5. Shanghai Hypergryph	0.96%	+0.37
6. miHoYo Games	2.45%	-116	6. Lingxi Games	5.11%	+0.27
7. Beijing Zhaoxiangnian	1.84%	+1.75	7. Middle Mobile Games	0.49%	+0.24
8. Guangzhou 37WAN	1.54%	+1.32	8. Shenzhen Zen-Game	0.23%	+0.23
9. Guangzhou Duoyi	1.5%	+0.16	9. Hainan Shangxuan	0.23%	+0.23
10. Shanghai Hode	1.18%	+0.97	10. Perfect World	0.22%	+0.22

Hot in Soft launch

A few handpicked hot and interesting soft launch games worth keeping an eye on



Marvel Future Revolution

Open World RPGs were quite a dry mobile genre in the US until Genshin Impact jumped to the top of the grossing charts with its incredible production values and massive open-world gameplay. Now we are seeing more and more big developers interested in the genre, and one of the hot upcoming titles is Marvel Future Revolution from Netmarble.

Marvel Future Revolution is an MMORPG where players control a Marvel Hero of their liking, playing through story with beautiful cutscenes, completing tasks, and exploring the vast open-world areas along with other players. Similar to the core strengths of Genshin Impact, Marvel Future Revolution seems to focus on high-quality gameplay and fluid combat. This, combined with Marvel IP's proven fit for RPGs, can definitely be a working recipe for another RPG success story in the grossing charts.



Star Stable Online

The classic horse-themed RPG Star Stable Online is in soft launch for iOS. The mobile version is identical to the PC game, and they are designed to be fully cross-play compatible: players can now take their horses with them on the go.

Star Stable Online has an open world where players can ride their horses, completing simple tasks and quests, as well as interacting with other players in guilds and races. The game has lots of customization options, and the focus is on gathering different horses and hanging out in a casual setting. The game makes use of paid subscription mechanics to unlock many features and areas in the world.

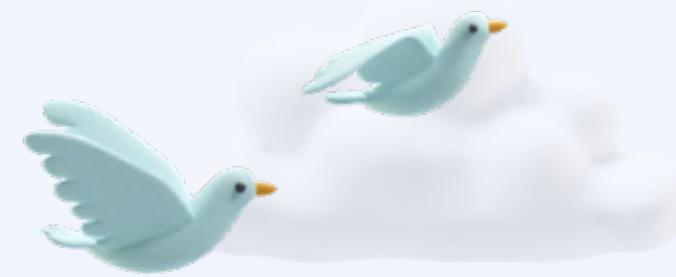


Boom Beach: Frontlines

Based on Supercell's Build & Battle classic Boom Beach comes a new top-down shooter game from Space Ape Games titled Boom Beach: Frontlines. The game takes elements from Brawl Stars while mixing them with more of a shooter-like gameplay, including larger tactical team battles, vehicles, and even building elements. The game feels like Brawl Stars mixed with Battlefield. The meta elements in the game revolve around collecting various character, vehicle, and building cards and upgrading them to get stronger in the matches, similarly to, e.g., Clash Royale.

All in all, with Brawl Stars-like quality shooter gameplay and audiovisuals, card collecting meta elements bringing a meaningful session to session progression, and a familiar Supercell IP, Boom Beach: Frontlines could be a true contender and bring the Boom Beach IP back to the top-grossing ranks.





Features Trends

- Must have Engagement features Puzzle, RPGs, Strategy
- Mobile game update trends in the US, JP, CN iOS

Must Have Engagement Features

Puzzle



RPG



Strategy



Joel Julkunen
VP of Games

Looking at some of the top mobile game genres, here are some of the most important features to include when planning your game's Engagement Features.

For example, a rich live event offering brings fresh content into the game and increases retention and monetization – and all the top puzzle games know this.

In Midcore titles such as RPG and Strategy games, special event currency and exclusive live event rewards are effective ways to increase player engagement and session length during the event and “hook” players to the game.

Mobile Games US iOS Update Trends



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VP of Games

We're seeing an increasing cadence of feature updates in games with a 37% increase YoY. This is partly expected as, over time, we see that games need to incorporate more and more features to stay competitive in today's mobile games market.

Game Feature Updates YoY
(Q2 2021 vs. Q1 2020)

+37%

Strategy Game Updates YoY
(Q2 2021 vs. Q1 2020)

+208%

Hypercasual Game Updates YoY
(Q2 2021 vs. Q1 2020)

-84%

However, there could be more at play here relating to IDFA and attempts to appeal to a broader audience as we see that certain genres are making far more significant investments updating their games with more features, e.g., Strategy on the top end compared to Hypercasual where we see a steep decline.

Mobile Games US iOS Update Trends



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VP of Games

Limited IAP Offer Feature

Updates YoY (Q2 2021 vs. Q1 2020)

+122%

Puzzle
+190%

RPG
+188%

Strategy
+175%

Live Events – Non-Recurring

Updates YoY (Q2 2021 vs. Q1 2020)

+143%

Puzzle
+63%

RPG
+245%

Strategy
+329%

We've discussed the power of Live Events, and Limited IAP offers before. Therefore, it comes as no surprise that YoY, these are the two features that stand out the most as more and more games are leveraging these for player engagement and monetization, particularly when it comes to Puzzle, RPG, and Strategy genres.

Non-recurring Live Events, in particular, are something that have already been hot for a while in China and Japan, but now we're clearly seeing them make landfall in the west with continuous collabs in games such as PUBG and Roblox.



Motivations

- US Market Top 200 Grossing Archetypes
- Top Archetypes, their motivations and appealing features

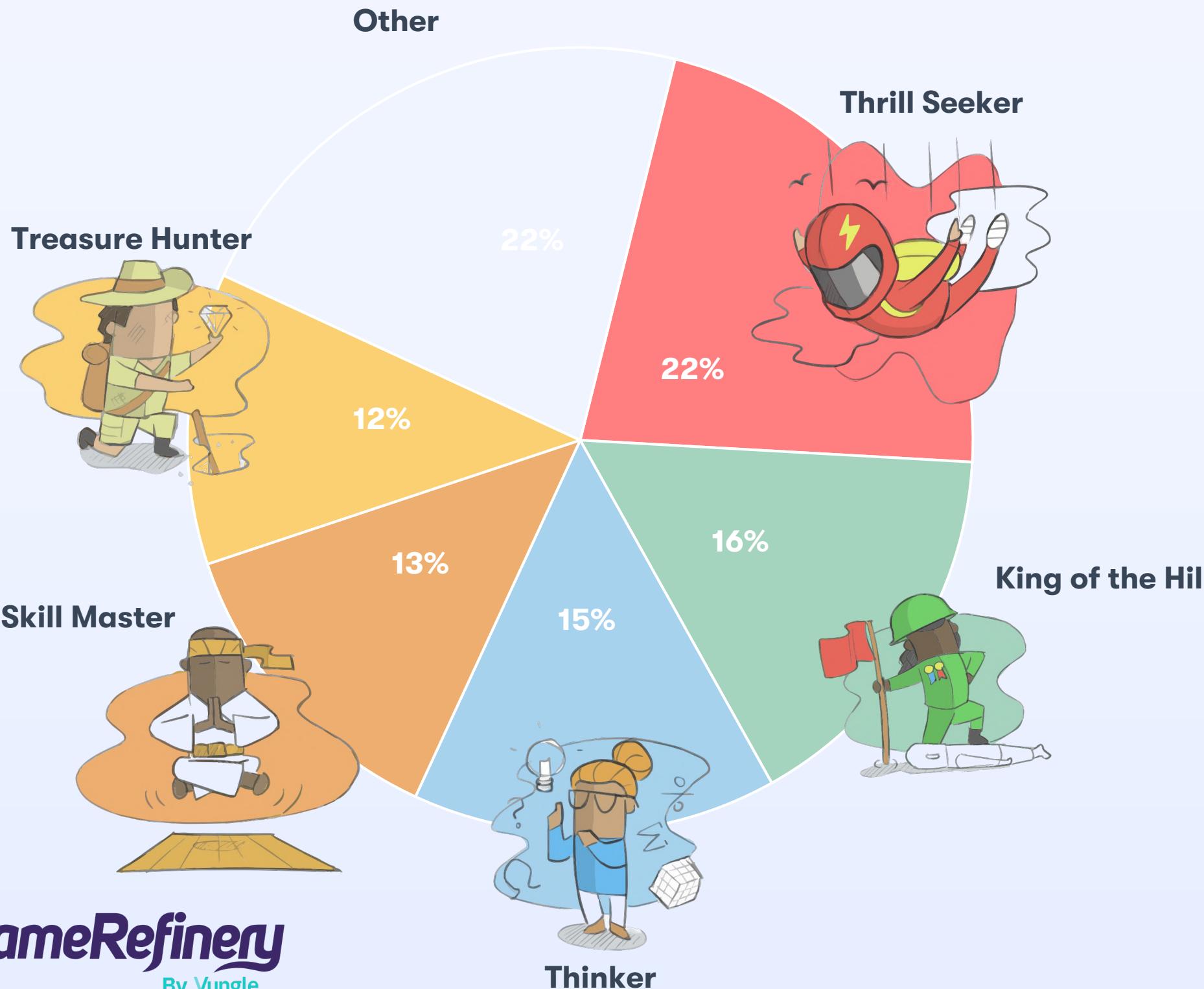
GameRefinery's Motivation Framework

- GameRefinery uses a proprietary motivation model consisting of twelve different Motivational Drivers, each covering a separate player root motivation.
- These Motivational Drivers are also grouped based on their nature to form meaningful pairs or “motivational groups” – for example Improving skills and Completing Milestones fall under Mastery.
- Motivation results are based on a survey including over 7000 respondents. The survey was targeted towards mobile game players in English speaking western countries (US, UK, Canada, New Zealand and Australia). The sample is representative of the smartphone users when it comes to age, gender, income and household size.

	Social - Working With Others		Expression - Role-playing & Emotions
	Social - Competing Against Others		Expression - Customization & Decoration
	Mastery - Improving Skills		Exploration - Discovering New Worlds
	Mastery - Completing Milestones		Exploration - Collecting Treasure
	Management - Strategic Planning		Escapism - Thinking & Solving
	Management - Resource Optimization		Escapism - Excitement & Thrill



Player Archetypes and Motivations US Market Q2 2021



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VP of Games

Looking at what player archetypes mobile games in the US top 200 grossing most appeal to, the situation in Q2 2021 is much the same as it has been for the past few quarters.

Archetypes that associate with fast passed action and competing against other players continue their triumph. King of the Hill regains its #2 spot with Skill Master and most highly appealing archetypes seeing a slight dip as games that appeal to other archetypes gain ground in the charts.



Key takeaways: Shooters mainly appeal to player archetypes that enjoy fast paced action and competitive skill-based gameplay. Men between the ages of 25-44 are the primary audience for these types of games.

Thrill Seeker

Sports



34%

Skills Master



29%

King of the Hill



20%

Other

17%



Appealing Features

PvP – Synchronous



Dynamic competitive league/ladder



Multitouch controls



Physics/gravity modeling



Male

Female

73%

27%

Age 16-24

Age 25-44

Age 45+

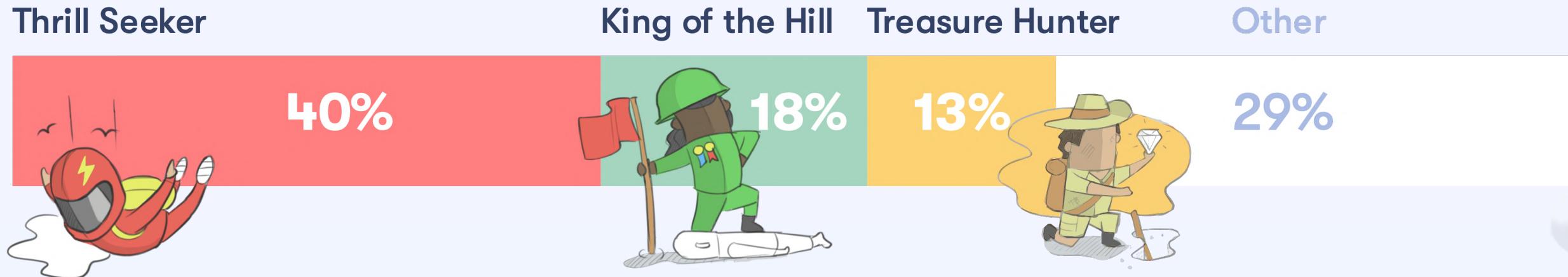
35%

44%

21%

Key takeaways: Similar to Shooters Sports games also appeal to players looking for exciting competitive skill-based game play but with an even further emphasis on gameplay that requires quick reflexes and provides thrilling moments. Men between the ages of 25-44 are the primary audience for these types of games.

Casino



Key Takeaways: Casino games appeal to players that look for the thrill of hitting that next jackpot but also players who enjoy the collectable aspects of these types of games. Men and women over the age of 46 are the primary audience for these types of games.



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VP of Games

Found this report and data interesting? Want to know more about mobile game genres, features and your competitors?

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

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GameRefinery
By Vungle

We Know Mobile Games

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

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US ▾

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GENRES

Casual, Mid-core ▾

SUBGENRES

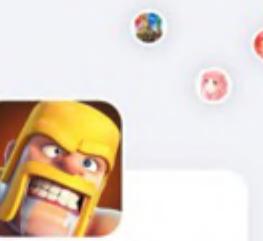
Build & Battle

3. Select optional Filter

Session Length Game Progression

Gacha Iap & Monetization

Live Events Appointment Mechanics



Clash of Clans
Supercell
Build & Battle

FEATURE INDICATORS

Powerscore 82

Skill Thinking

MONTHLY PERFORMANCE

Average Grossing Rank	10
Average Download	195K
REV / DL	\$30.1

12 Player Motivations

