

Mobile Game Market Review October 2023



Seasonal events are a great way for mobile game studios to boost their revenue, and October provided no shortage of them, with *Whiteout Survival*, *My Perfect Hotel*, and many more taking part in frightening festivities by launching Halloween-themed content updates.

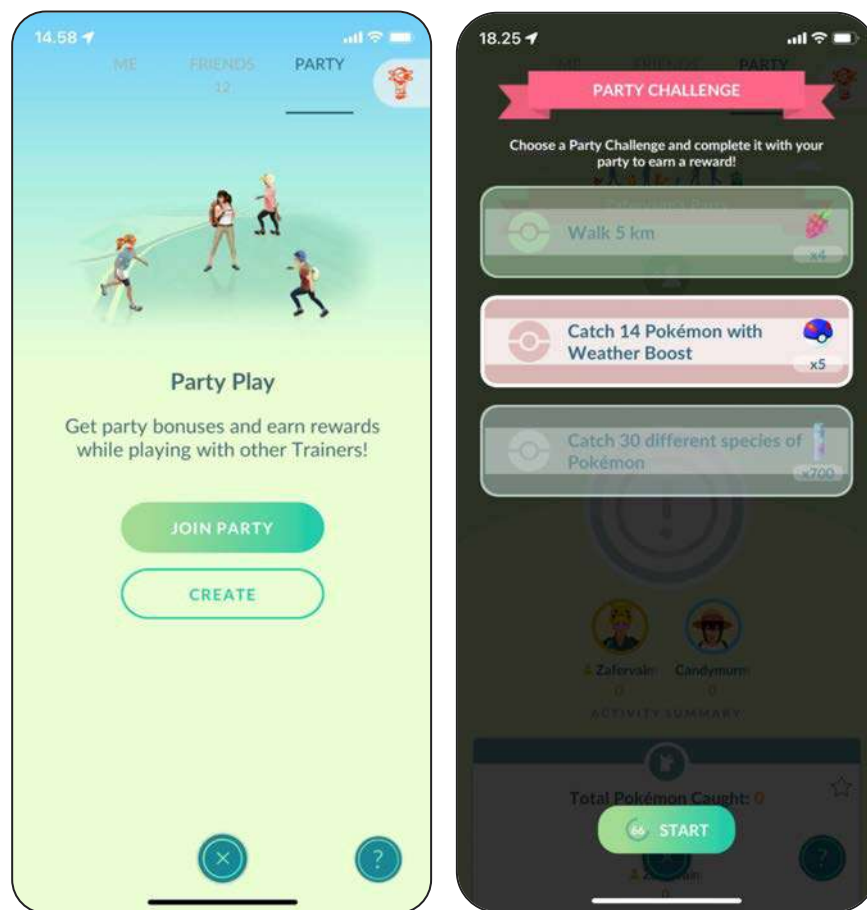
Speaking of updates, October saw major content updates for *Stumble Guys*, *Pokémon Go*, and *Monster Strike*, ranging from new limited-time game modes inspired by the latest viral trends, some exciting developments in race events, and a variety of monetization features, including skins, permanent boosts, experimental gacha types, and new battle passes.

Regular readers will notice another change alongside these market updates: the format of these analyst bulletins. To help our readers find updates most relevant to them, we've made the decision to overhaul how we write these analyst bulletins and categorize updates via game genre rather than by market. We hope this will make it easier for our readers in game development and marketing to stay updated on the trends driving engagement in the genres most relevant to them.

As always, you'll find the biggest updates that took place in October, along with the latest news and stand-out stories from the mobile market, below.

October's casual mobile game updates

[Pokémon Go](#) introduced a four-player party system following its success in Niantic's other AR game, Monster Hunter Now, which was released in September. Parties can be formed with players near your physical location and last for one hour. The party leader can choose one active task from a selection of three, and once it's cleared, a new task can be picked. Party gameplay also gives a boost to Raid performance.



Party Play in Pokémon Go

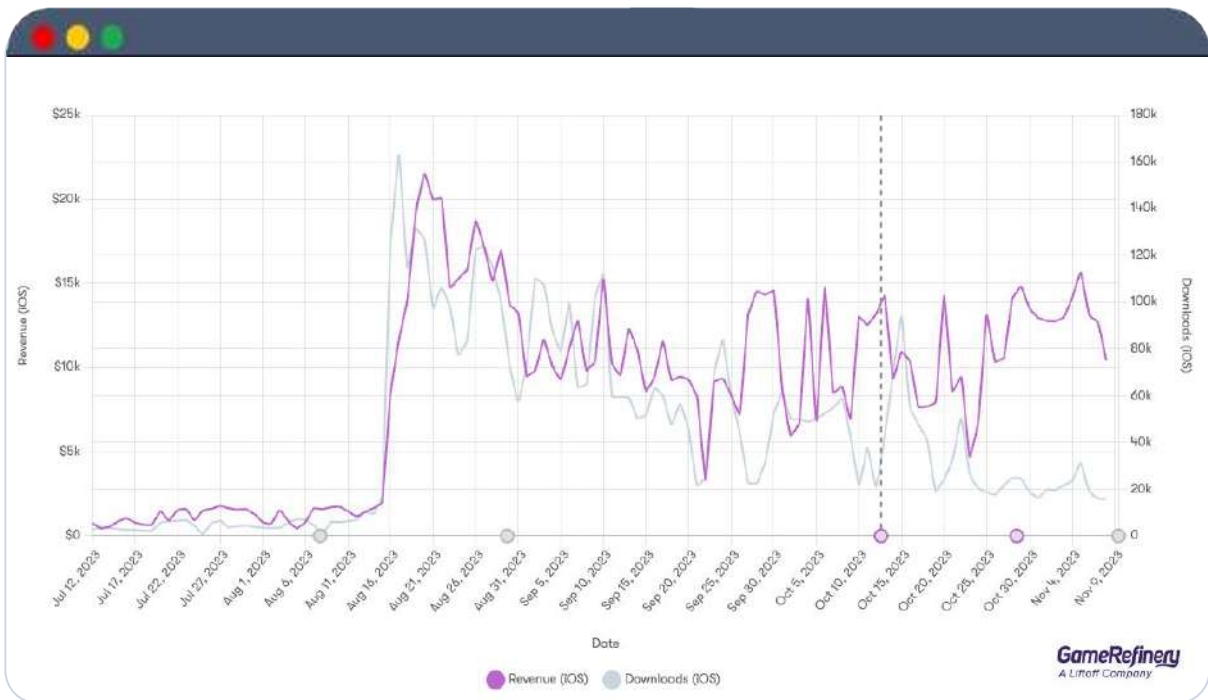
Board game [Phase 10](#) brought a completely new twist to the [race event](#) archetype in their Showtime event through a quiz mechanic. Instead of the race mechanics revolving around players completing the required round of levels (which is common in match3s), you progress through the race by answering quiz questions correctly instead. Quiz question tries are gained by playing Black Cards (special booster cards) inside the gameplay levels. You can read more about the event and the unique event framework of Phase 10 in the [GameRefinery Live Events Tracker](#).



Showtime event in Phase 10

Hotel sim Idle Arcade, [My Perfect Hotel](#), launched two major updates ([Halloween update](#) and [Features update](#)), which introduced a new permanent boost system, a special battle pass, hotel manager skins, and a limited-time Halloween event with Halloween-themed skins and a special currency.

The game has previously scaled highly in most downloaded and top-grossing rankings. After the two major updates, you can see that even though the downloads rankings have dropped, the revenue trend is much better.



Download and revenue performance for My Perfect Hotel on iOS US (GameRefinery Platform).

Netease's October update for Fall Guys and Stumble Guys imitator, [Eggy Party](#), introduced a new 'Pedestrian Street' hangout game mode, where players can open up their own restaurants, clubs, spas, and stores, amplifying the game's social features outside of the core minigame mechanics. Players can give gifts to stores they enjoyed visiting, which increases their rating and ultimately rewards the owner with special currency used in an event store.



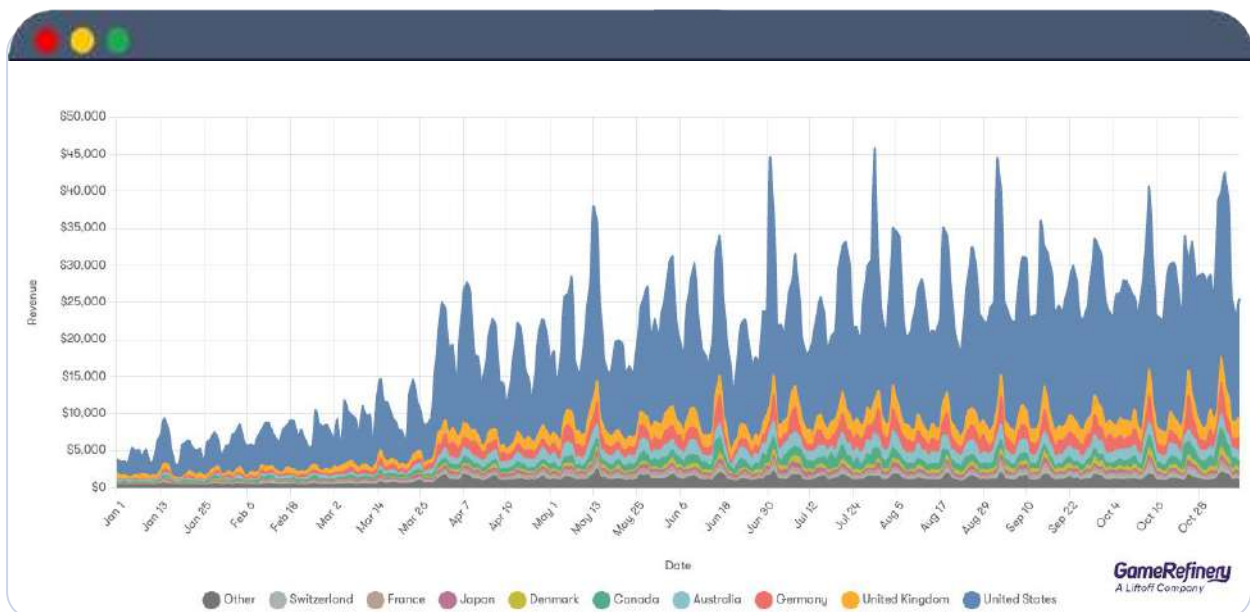
Eggy Party's a new 'Pedestrian Street' hangout game mode.

Speaking of party royale games, [Stumble Guys](#) introduced a new limited-time, one-round-only game mode in its 'Stumble Up' map. Gameplay is incredibly challenging compared to other maps and shares a lot of similarities with viral PC games such as 'Getting Over It' and 'Only Up,' as the map doesn't feature a time cap and requires players to navigate a series of platforming challenges that increase in difficulty. Similar to the PC titles, failing an obstacle usually leads to you falling down all the way to the beginning, requiring a serious amount of perseverance to complete.

Futureplay's [Merge Gardens](#) made its first appearance in the top-grossing 200 in October. After a slow start in the market, the hybrid merge/match3 title has been steadily scaling its performance since the beginning of 2023, starting with a major content overhaul in January 2023 when a fresh cast of characters and mystery story elements were added to the mix. Since then, Futureplay has been steadily making improvements and adding new features and events to the game, resulting in its continued success.



Merge Garden's recipe combines Merge Dragons-style merge gameplay with match-3 puzzles.



Daily revenue performance from Merge Gardens on iOS (GameRefinery Platform).

October's midcore game updates

One of the biggest updates from October was [Monster Strike's](#) 10th Anniversary update in Japan, which featured a variety of elements that aren't regularly seen in Western games, such as a celebratory social multi-gacha that could be pulled solo or with friends. The gacha featured several reward pools to choose from, and when pulled with friends, everyone pulling the gacha would get each other's chosen characters.

It also hosted two crossover events, one with the popular anime Tokyo Revengers and another 'Orb Back' event with two Japanese comedians, Ryota Sakai and Mogura Suzuki. The Tokyo Revengers event introduced battle levels against collab characters, themed log-in gifts, IAP offers, and new gachas, while the Orb Back event involved players predicting the results of playful duels between the comedians such as Jenga games to win premium currency orbs.



Monster Strike's 10th anniversary celebrations in October included many campaigns, such as the Orb Back campaign in collaboration with a pair of Japanese comedians (left). A collaboration event with a popular anime Tokyo Revengers was also held (right).

Finally, Monster Strike also hosted a discount campaign with Japanese businesses held in the location-based game mode Monstop. Players could get discounts at restaurants and places like bowling alleys by navigating to them with the Monstop function.

[Arena Breakout](#), a global version of the China market's high-performing extraction FPS ([暗区突围](#)), entered the top-grossing 200 chart for the first time in the US market. The game peaked at #161 after the launch of a new update introducing a variety of content, including a new map, new battle pass and ranked seasons, Halloween-themed events, and limited-time gachas for exclusive cosmetics. You can read the detailed analysis of this unique shooter [here](#).



Arena Breakout

Additional midcore highlights

- ◆ [Souls](#), an idle RPG by Habby with a similar aesthetic to thatgamecompany's Sky: Children of the Light, entered the top-grossing 100 chart in the US.
- ◆ [Dungeon Hunter 6](#), the latest installment in the legendary Dungeon Hunter action RPG series, launched with a Nickelback collaboration event. It peaked at a #43 top-grossing position right after launch and is still hovering around the top 100.



Dungeon Hunter 6 collaborated with Nickelback

- ◆ Recently launched [Reverse: 1999](#) is an engaging time-travel Strategic RPG that boasts a captivating, fully voice-acted storyline complemented by beautiful music and stunning graphics. The game introduces a unique combat system where characters utilize distinct cards that can combine into more powerful ones. Additionally, players have the opportunity to construct and enhance their own island, contributing to resource generation. The game reached the 62nd position in the top-grossing charts in the US right after its launch and the 23rd in Japan.
- ◆ [Seven Deadly Sins](#) has expanded its availability to include China. Garnering acclaim, it achieved a rank of 37 in the top-grossing charts at its peak, and it was launched with a download rank as impressive as 1.



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