



Business Landscape Overview

Q3, 2021



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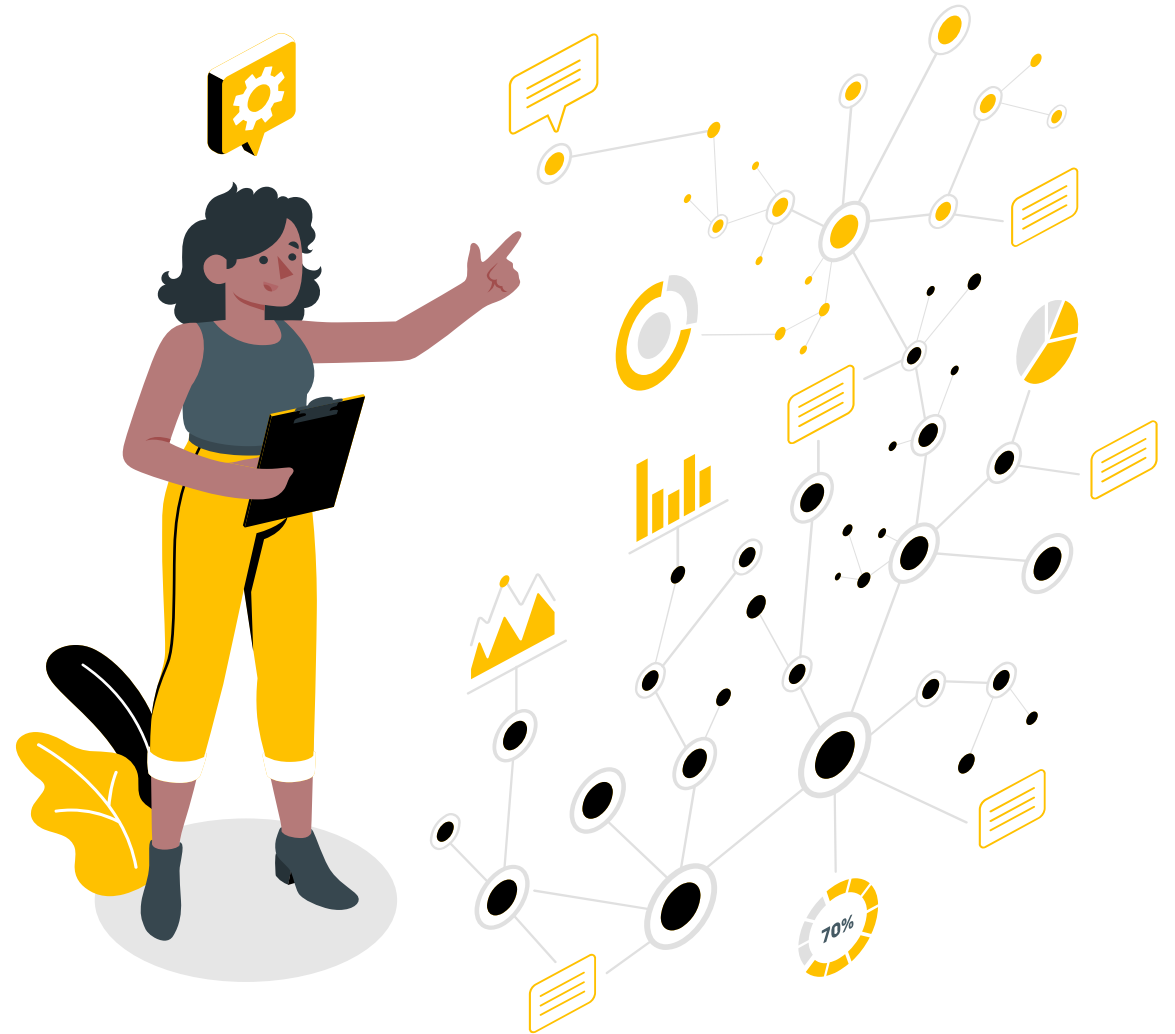
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Scope

This overview presentation is meant to highlight the business opportunities within the Mobile Gaming Industry. To do so, a two-prong approach was used to review:

1. Growing trends within the mobile gaming environment which includes emerging game genres and/or subgenres, platforms, art styles and IPs.
2. Observation into the business landscape of the Mobile Gaming Industry by looking at the activities of Amber's competing creative agencies which includes: Revenue Performance, Merger and Acquisition activity and other actions taken by gaming publishers.



Objectives

The objectives of this review is to help the leadership members, directors and producers with:

1. Knowledge of potential Opportunities within the Mobile Gaming Industry.
2. Better inform on future Business Strategy.



Executive Summary



2021's Biggest Trend: Mobile Game Hybridization

When a plethora of game genres are already established along the years, it's only natural to assume that developers will take their pick of features, art styles etc. to either impress or, even better, migrate users from one place to another.

While Merge games are trying to evolve around Match-3 games, asymmetric survival games are still trying to fit into the market and 4X strategy games are experimenting with different art styles to attract more casual players into the land of strategy games.



NFT Games Pique Investors Interest and Raise Large Sums in Bid for Future Success

So far, games with any kind of NFT tech in them are either niche or no one has ever really heard of them. However, this year, it is not the case anymore, with Steam choosing to opt out any game that features NFTs and Epic Games choosing to "see what" happens by letting them on their store, one thing is clear: judging by the number of massive investments, it looks like we'll be seeing an uptick in such games in the following years.

The remaining unknown is whether they will catch on to the general public or will remain a niche for investor-type players.



Business as Usual in the Gaming Industry as Developers Adapt and Face Ongoing Challenges

While the COVID-19 pandemic is still running amok in the world and the gaming press hailed the ad-pocalypse following the loss of IDFA for iOS, the gaming industry is still thriving with [player spending still growing](#).

No IDFA? No problem. With rising UA costs and stiffened competition, developers are finding new ways to advertise their games, and see if their ads are still effective. Game genre hybridization is one of the other ways developers are looking to make their games not only look more appealing but retain players as much as possible as well.



Business Landscape Overview

1. Industry Environment Review

1.1 Gaming Industry Activity

1.2 Developer Trends



1. Industry Landscape Review

1.1 Gaming Industry Activity

Competitors and Publishers' Q3 Performance

M&A Activity

Fundraising Activities

NFT/Blockchain Private Placements



Industry Landscape Review

Competitors and Publishers' Q3 Performance

- Virtuos obtained [\\$150M](#) investment to set sights on further growth;
- Keywords Studios reveals revenue of [€238.7M](#) for H1, 2021;
- Sumo reveals unaudited H1 2021 results: Revenue is at [£50.4M](#) with a gross profit of £21.9M;
- Rovio announces group revenue of [€71.4M](#) for Q3;
- Russian developer, My.games, reveals [2.3%](#) YoY growth (\$137M in reported revenue) for Q3 2021;
- Facebook Gaming (1.29B hours) overtakes YouTube Gaming (1.13BN hours watched) in views in Q3;
- Microsoft announces increase in hardware revenue of [166%](#) for their FY first quarter;
- [IO Interactive](#) reveals \$78M in profit (136% increase over last year) driven by Hitman 3;



Gaming Industry Activity

M&A Activity

Mergers and Acquisitions:

- Netmarble acquires mobile casino game dev, SpinX, for \$2.2B;
- [ByteDance](#) set to acquire Pico Interactive (VR headset manufacturer) for estimated \$1.5B;
- [Tencent](#) to acquire Sumo Group by paying a 43\$ premium for \$1.27B;
- Starlark, known for mobile golf game Golf Rival, acquired by [Zynga](#) for \$525M;
- Reworks acquired for [\\$400M](#) by Playtika who will also buy final 20% next year (up to \$200M);
- [Unity](#) acquired cloud streaming platform, Parsec, for \$320M;
- Night School Studio (developer of Oxenfree), [acquired by Netflix](#).



Gaming Industry Activity

Fundraising

Funding Activities:

- [Sorare](#) obtained \$680M in a round led by Softbank, the company has the largest valuation in Europe's Series B;
- Canadian Studio, Ludia, [acquired](#) for \$165M, from a total of \$350M in funding raised for Jam City;
- Coatue Management valued Dapper Labs at \$7.6B, which [raised \\$250M](#);
- Groupe Bruxelles Lambert, valued Voodoo at [\\$1.9B](#) and raised \$315M;
- [\\$200M](#) raised for Probably Monsters;
- 1047 Games raise [\\$100M](#) at a \$1.5B valuation.

Public Markets & SPAC News

- Krafton raises [\\$3.8B](#) through IPO on Korean Stock Exchange;
- Double Down Interactive raised [\\$113.7M](#) through IPO on NASDAQ, the company is valued at \$892M.



Gaming Industry Activity

NFT/Blockchain Private Placements

Company	Segment	Date	Deal Value (\$M)	Valuation (\$M)	Investors
Sorare	Fantasy Sports	21-Sep	\$680	\$4,300	SoftBank Group, Accel, Benchmark, Headline, Bessemer Venture Partner, D1 Capital Partners, IVP
Dapper	Collectibles	21-Sep	\$250	\$7,600	Coatue, Andreessen Horowitz, Bond, GV, Version One Ventures
Animoca Brands	Developer	21-Jul	\$139	\$1,000	ACME, Andreessen Horowitz, Canaan, Griffin Gaming Partners, Samsung Next, Conductive Ventures
Immutable	Platform	21-Sep	\$87	-	AirTree Ventures, Apex Capital Ventures, Bitkraft, King River, Panda Capital
Mythical	Developer	21-Jun	\$75	\$435	Bilibili, Red Bird Capital Partners, Javelin Venture Partners, Alumni Ventures Group, (01.Advisors)

Most investments went into the developer segments and the largest deal so far is into Sorare which recently welcomed [Bundesliga and Bundesliga 2](#) along with [La Liga](#) in the world of fantasy football. Additionally, Sorare is also working with Ubisoft's F2P game [One Shot League](#).

Dapper – The NFT Company – is most well known for [NBA Top Shot](#), [CryptoKitties](#) and [Cheese Wizards](#). Soon to come is [UFC](#) on [Flow](#) – Dapper's own blockchain.



Gaming Industry Activity

NFT/Blockchain Private Placements

Company	Andreessen Horowitz	Blockchain Capital	Dragonfly Capital	Jump Capital	TigerGlobal	Coatue	SoftBank	Accel	Valar	True Venture
Total Deals	32	24	15	15	14	10	8	7	6	6
Deals Led	13	6	6	2	8	7	3	2	4	3
Location	US	US	US	US	US	US	JP	US	US	US

Currently the main location for deals and fundraising activities are based in the US.

The leading company in terms of such deals is [Andreessen Horowitz](#). A Silicon Valley based venture capital firm that boasts \$19.2B in assets under management.

Blockchain Capital, the 2nd leading investor in NFT/Blockchain currently has 125+ portfolio companies and \$1.5B in assets under management.

Takeaway:

The number of deals done this far goes to show an invested interest (pun intended) for the NFT/Blockchain side of games which will lead to a lot of interesting projects to look forward to.



Gaming Industry Activity

Takeaways

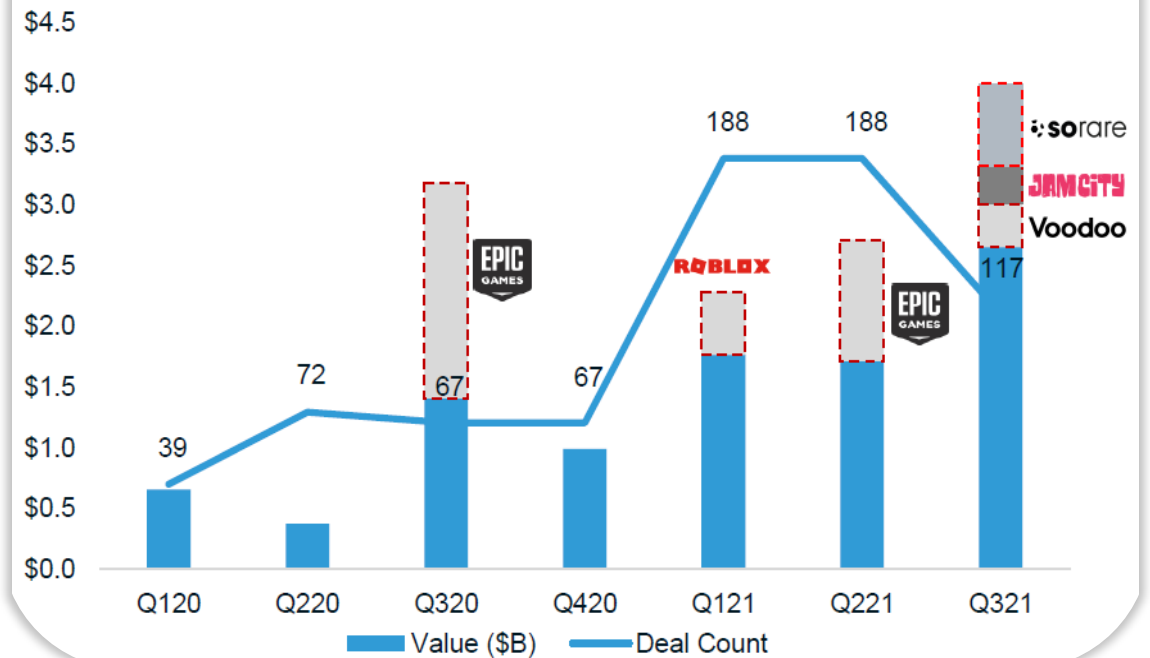
Throughout 2021 there have been a total of 493 deals made, most of which (333) were made in the early side of the year.

However, in late 2021 the value of those deals add up to \$6.2B worth of private placements out of a total of \$9B.

The biggest private placements of Q3 are Sorare (\$650M) from the Blockchain segment and Jam City (\$350) from the mobile segment.

This suggests that, so far, Mobile and Blockchain are the two most trending sections within the gaming industry as far as Q3 2021 is concerned.

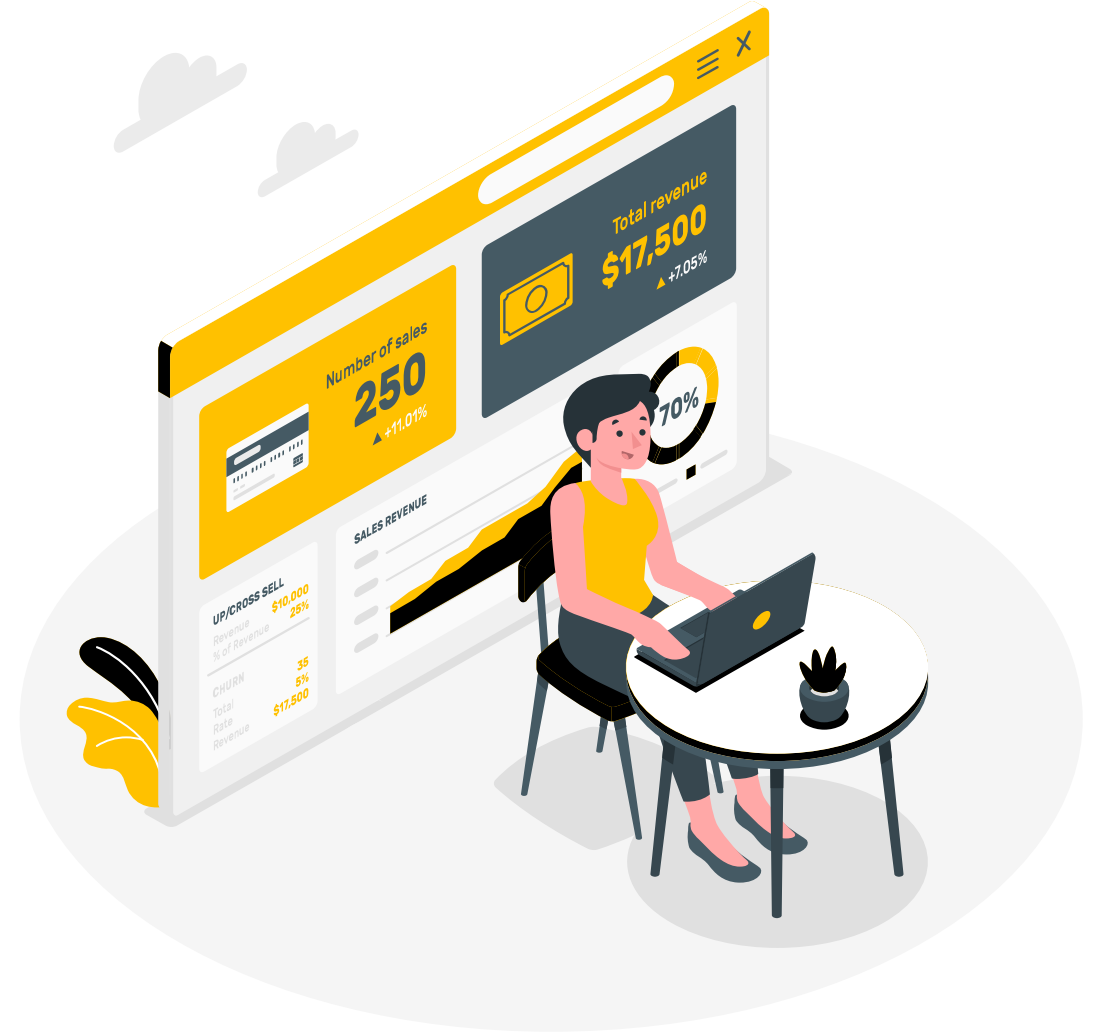
Private Placements (\$B): By Quarter



1. Industry Landscape Review

1.2 Developer Trends

Mobile Game Developer Survey



Mobile Game Developer Survey

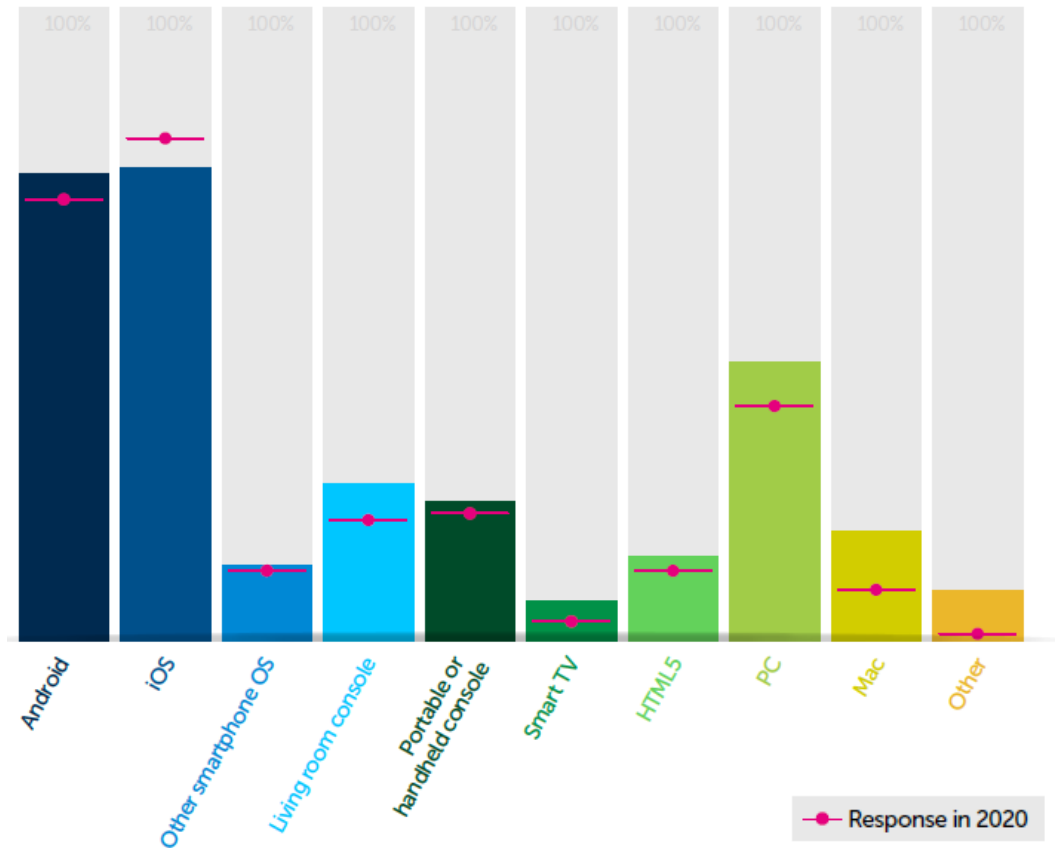
Most Important Platforms

According to the [Mobile Game Developer Survey](#) conducted by PocketGamerBiz, the main platforms remain roughly the same on mobile with Apple and Android dominating.

Consoles and PC are getting a bit more attention and looking at the general growth among all platforms, cross-platform and cross-play is a trending feature.

With the rising performance of Smartphones and Tablets, we expect most titles to let players move around between platforms.

What platforms are most important to your organization?



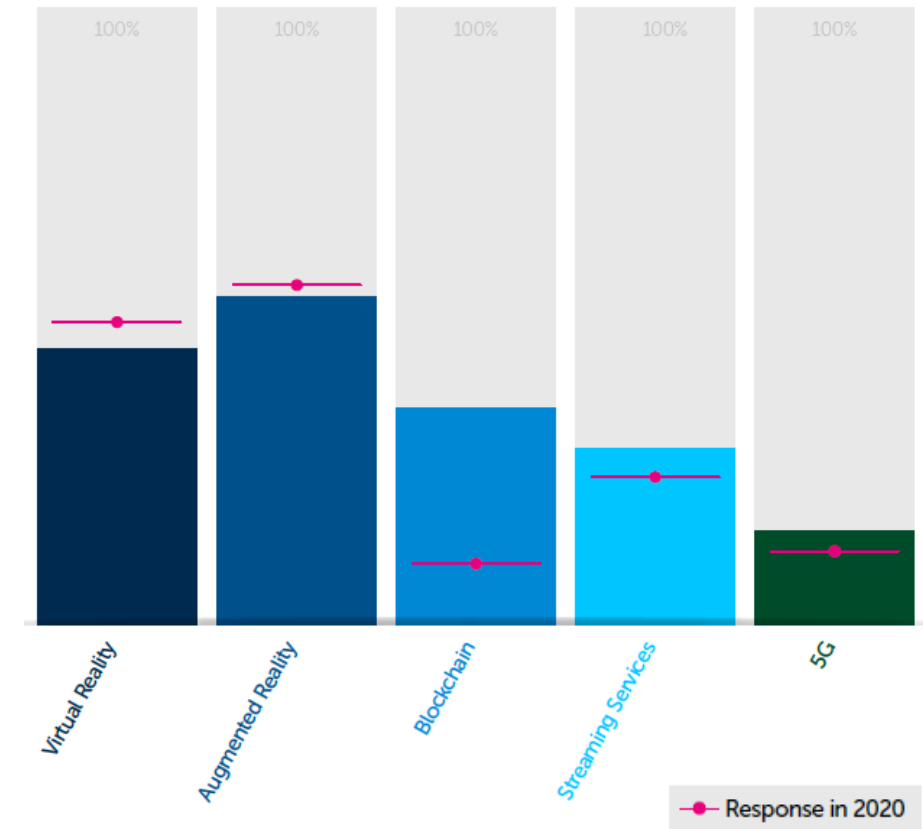
Mobile Game Developer Survey

Development/Publishing Preferences

While AR and VR seem to have dropped in terms of interest, there is a breakthrough in terms of which tech is getting the most out of development/publishing: Blockchain.

This is not surprising, however, given the multitude of NFT based games that are receiving funding this year.

Do you develop/publish for any of these technologies?



Mobile Game Developer Survey

Average Budget Per Game

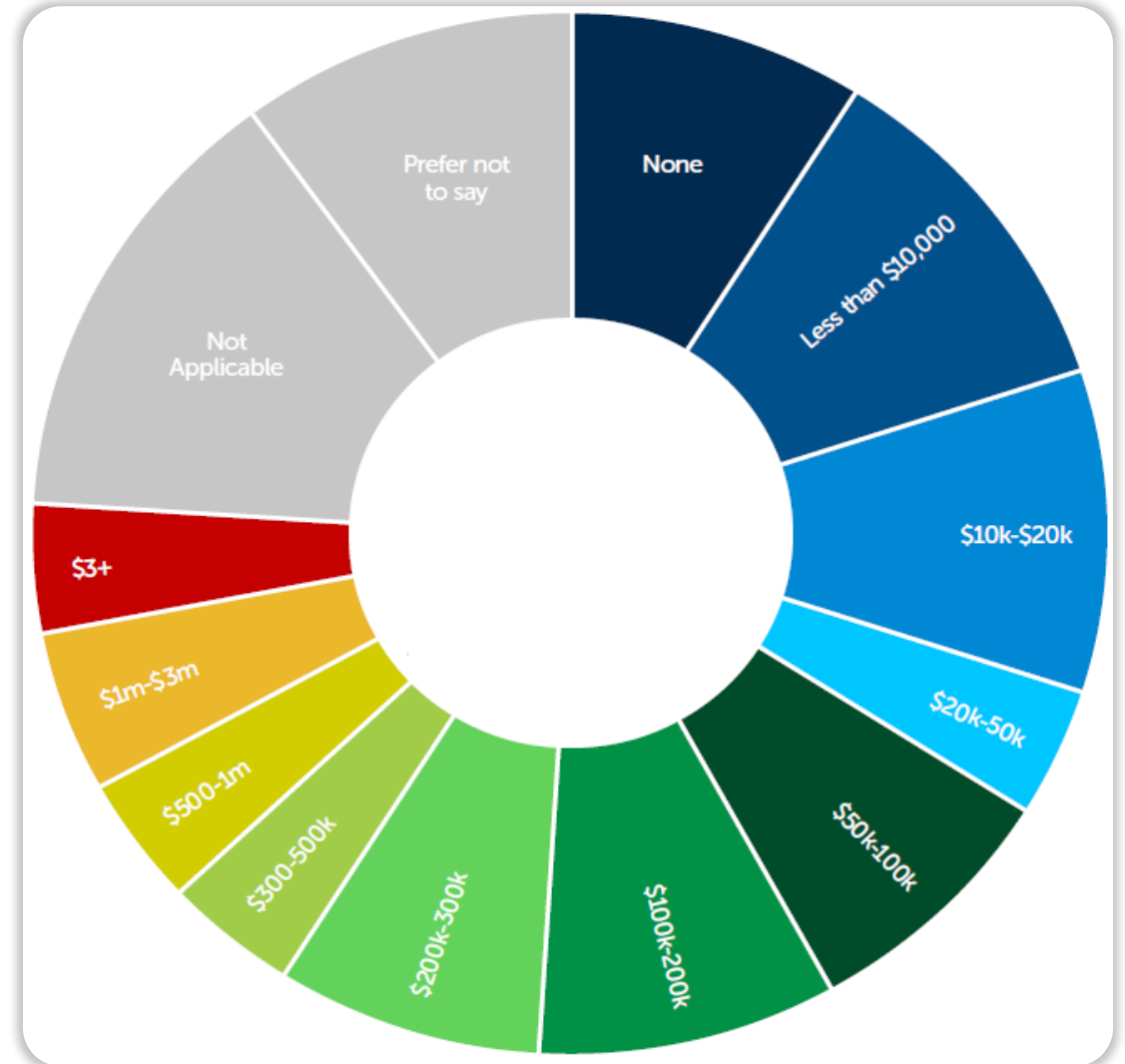
While most games receive development budgets of \$100K - \$200K (9.3%) and around 8% of them at \$200K - \$300K; around 40% of them have a budget of lower than \$100K and a bit under 10% receive a budget of between \$1M and \$3M.

Takeaways:

The variety of budgets suggest there is a variety of game types being developed;

There is a drop in percentage for games at a larger budget compared to previous years, from approximately 13% in 2020 – 2018 to almost under 10% in 2021.

What is the average budget for mobile game development in your organization? (per game)



Mobile Game Developer Survey

Expected Profit Margins

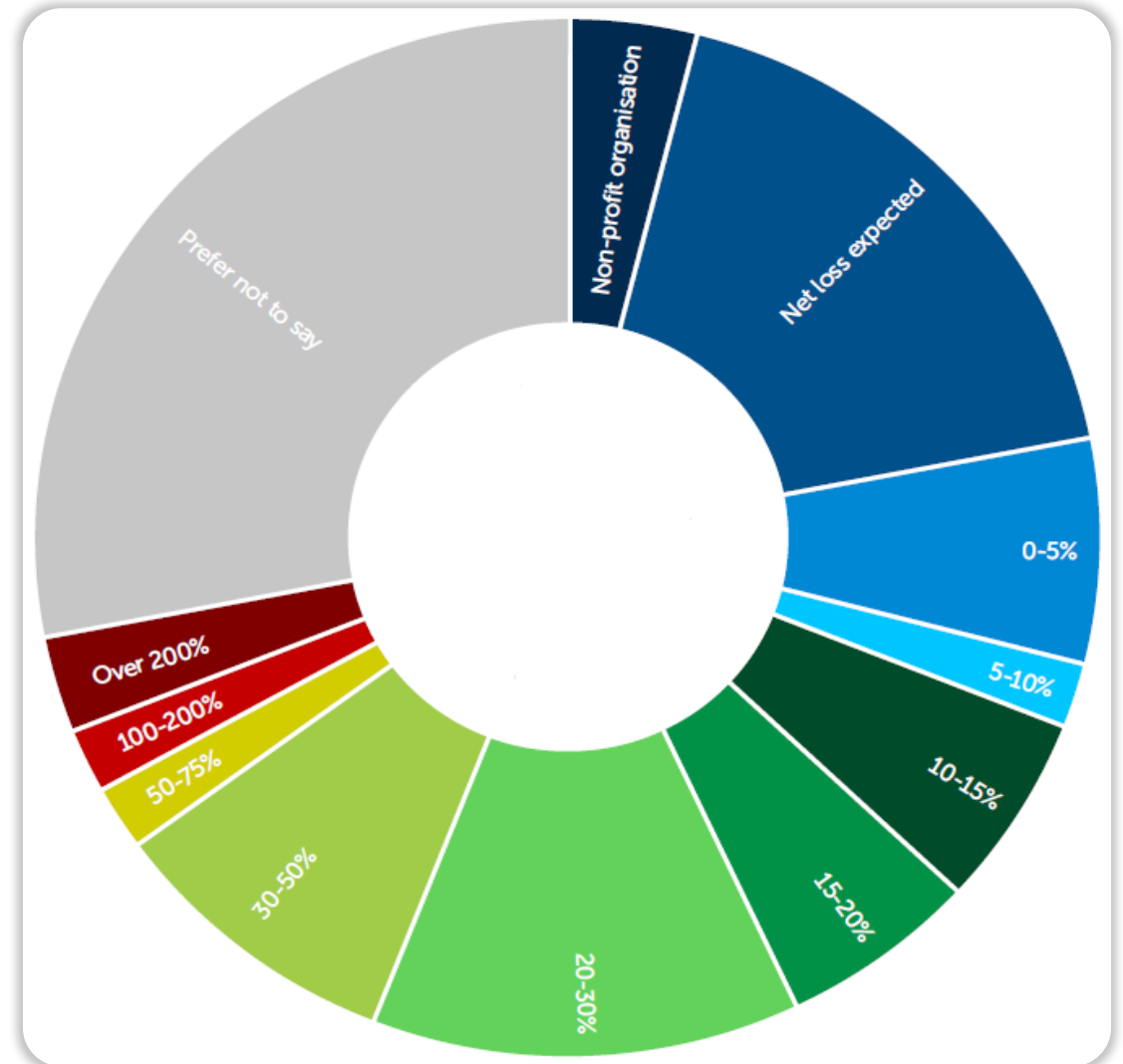
A chunk of results here are left with a 28% gap since, as expected, some developers preferred not to answer this question.

17% of developers expect a net loss and 12% expect a profit margin of between 20 to 30%.

Takeaway:

Despite the challenges developers must face, between rising competition and a worldwide pandemic, videogames are still turning up a profit for a majority of game developers.

In this current year, what's your organization's profit margin expected to be?



Mobile Game Developer Survey

Average Promo Budgets

Most respondents choose to spend less than \$30K on promoting their product – approximately 24%.

On the other end of the spectrum developers are shying away from the higher risk \$1M budgets: 7.5% in 2021 while in past years, around 11% of them would spend more than \$1M on ad budgets.

Compared to 2018 (3.2%) and 2020 (0.7%), there's an increase in developers (8.4%) who spend between \$300K - \$500K on ad budgets.

Takeaway:

With rising competition in the mobile gaming market, UA challenges coming from the post IDFA world, we note fluctuations in spending especially on the extremities of budgets.

There's less developers that go on the cheap route (23% compared to 36% in 2018) and less (by around 3-4%) who go big in spending. Most likely, developers are catching on to the fact that hybridizing game features and art styles might be a better investment route than ads.

What's the average budget for promoting your product(s) for the next 12 months? (per product)



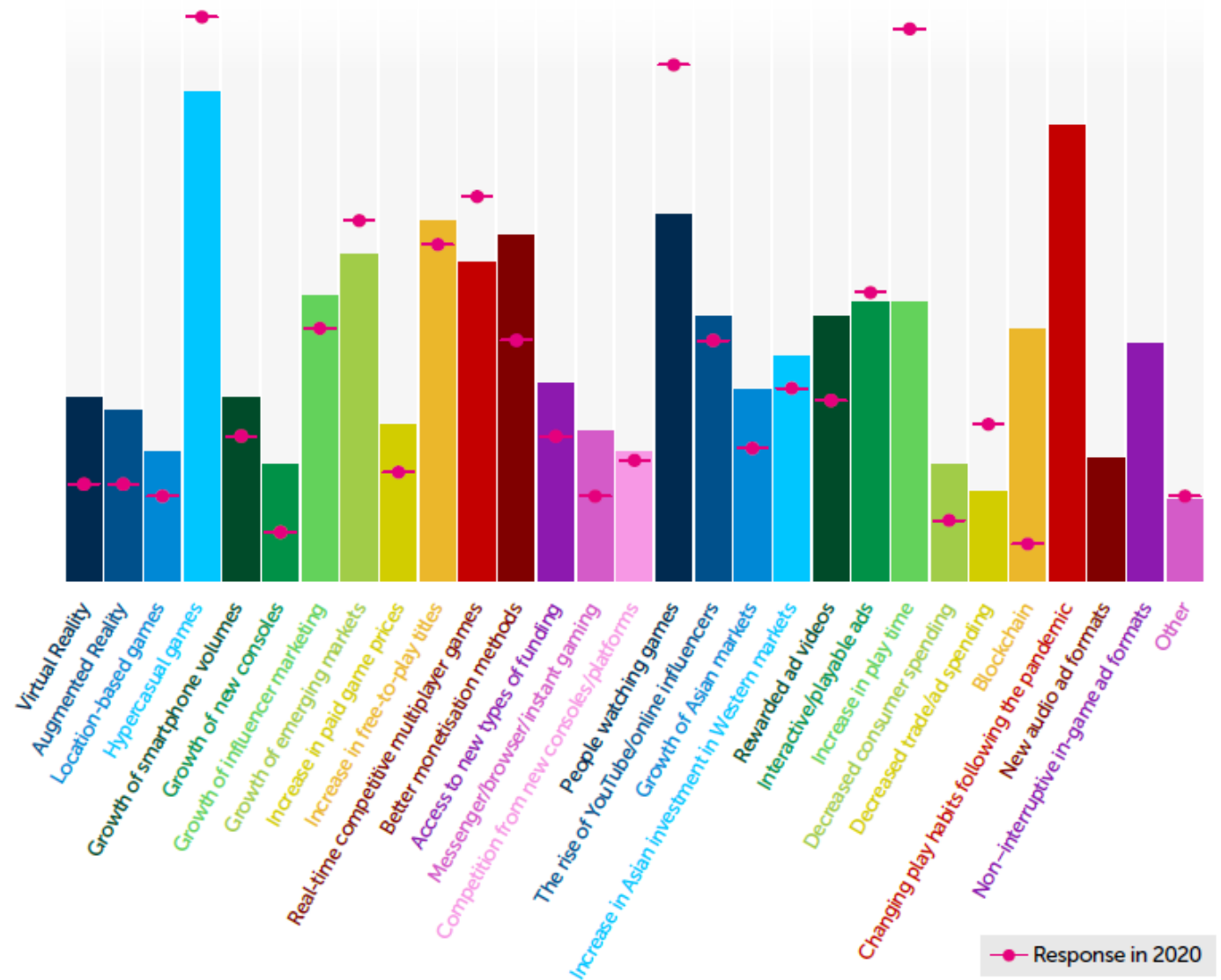
Mobile Game Developer Survey

Key Opportunities

There's raised interest in VR and AR tech from developers however, as seen on page 28, investment is slowly dropping which suggests that the market might become more attentive and reticent at the same time.

In terms of genres, **Hypercasual** is still on the hype wagon and **Location-based** games are enjoying some raised attention in 2021.

In terms of ads, while interactive/playable ones are seeing a slight loss in interest, **rewarded video ads** are becoming more popular.

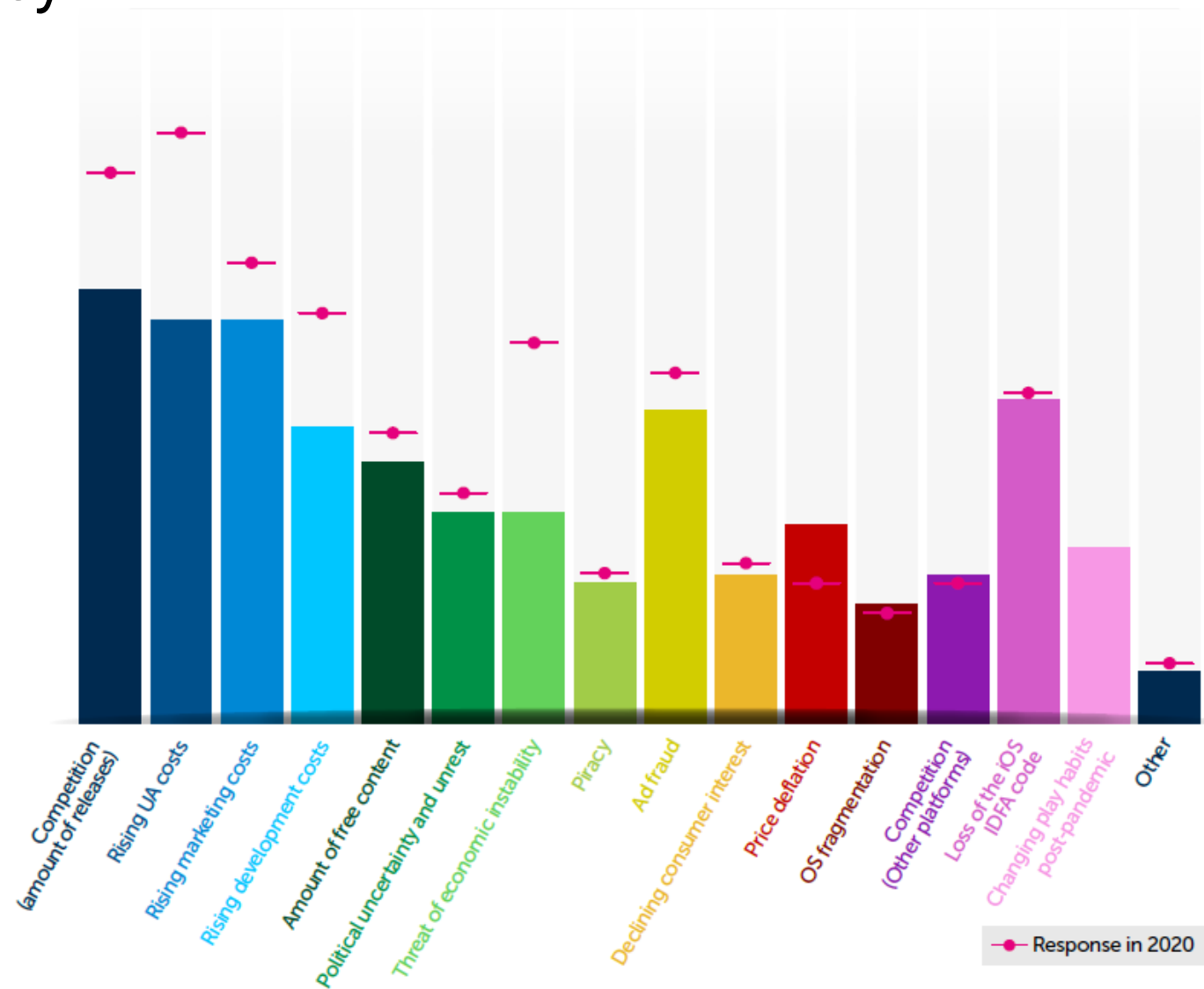


Mobile Game Developer Survey

Key Threats

Competition along with raised UA and Marketing costs are the top perceived threats which go hand in hand with the loss of iOS's IDFA.

Despite this, we note that these threats were seen as much higher in 2020 which means that developers are already adapting and finding ways to confront these challenges.



Mobile Game Developer Survey

Takeaways

iOS and Android are still the main platforms focused on by developers followed by Mac, PC and Consoles too;

Blockchain/NFT games are the fastest growing segment on the market this year with plenty of investors putting their money into developers this year;

Most developers are expecting to turn a profit, despite challenges in rising competition, a worldwide pandemic and the alarming news about an ad-pocalypse, the gaming industry has a positive outlook in terms of revenues;

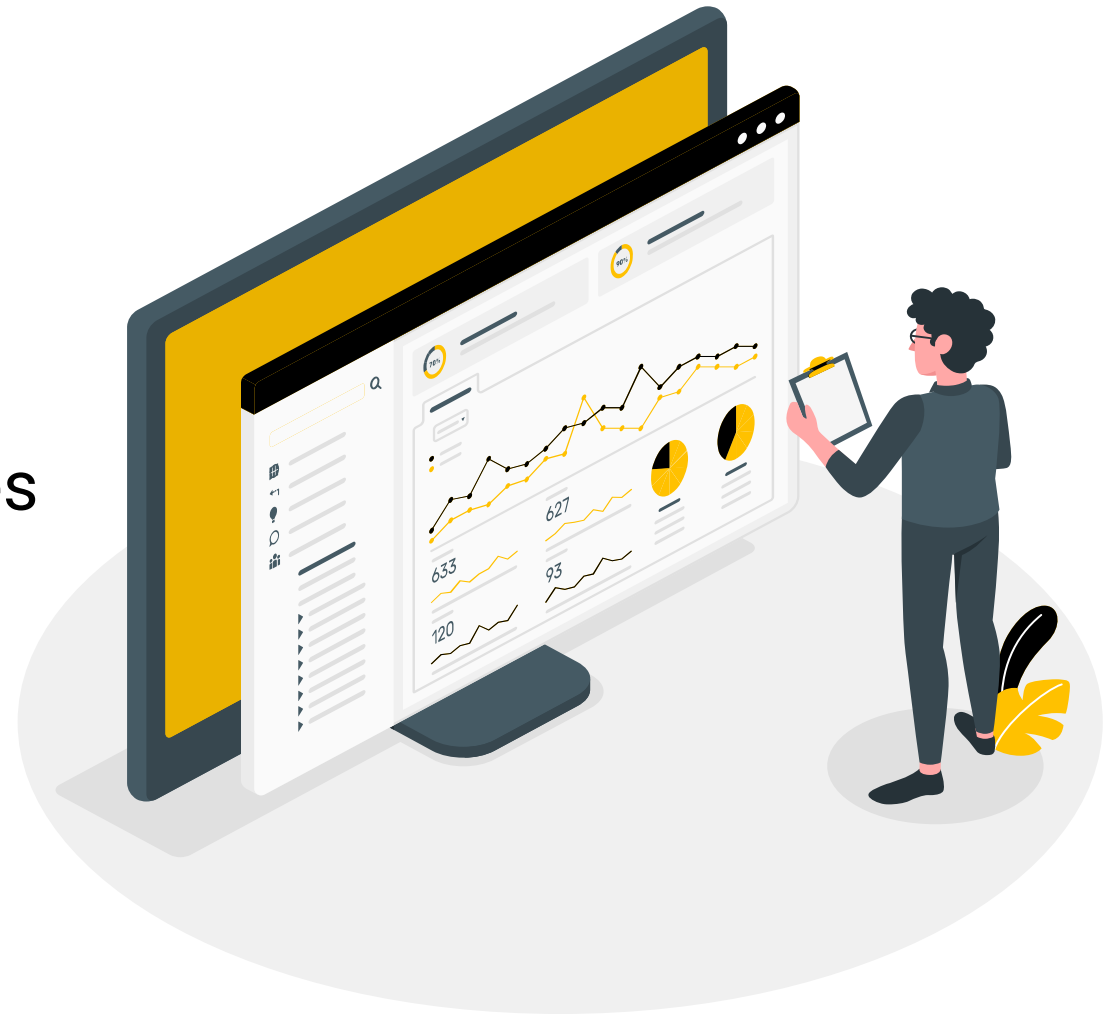
Hypercasual and location-based games are still trending in the eyes of developers, while in terms of ads, the popularity of rewarded video ads and playable ads are also on an upward trend.



Business Landscape Overview

2. Mobile Gaming – Future Opportunities

- 2.1 Emerging Genres
- 2.2 Upcoming Platforms
- 2.3 Art Styles
- 2.4 Trending Features



2. Mobile Gaming Trends

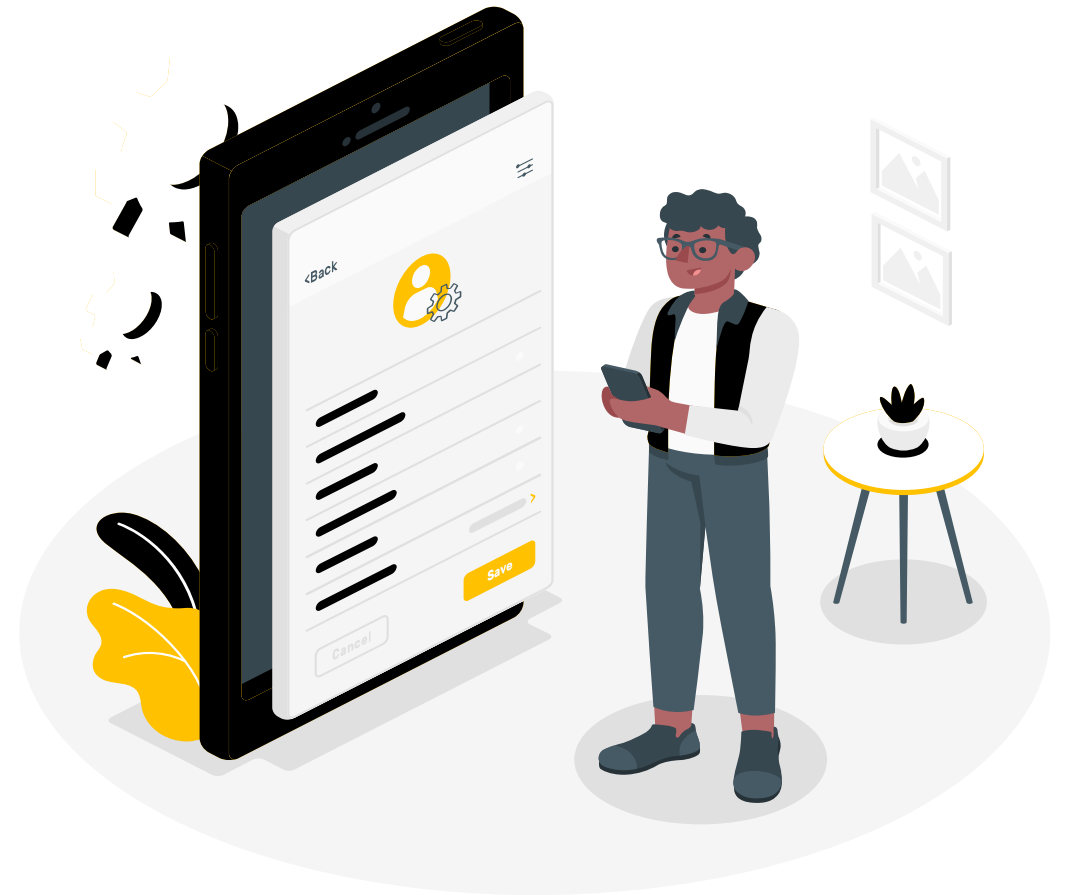
2.1 Emerging Genres

Intro

Merge Games in the Market

Asymmetric Survival/Battle

Sovereign/Empire Simulator RPGs.



Mobile Gaming Trends

Emerging Genres

Some of 2021's game genres that have gained our attention include:

Merge Games

The core mechanic is combining identical objects to create one or more objects of a higher level. Most Merge games have some similarity to Hybrid Match-3 games. For example, in Merge Magic the player can clear levels by merging objects, which is part of the game's Core Loop. Additionally, the player is given a Garden that can be cleared by merging objects – and by doing so, upgrade creatures, buildings and so on.

Asymmetric Survival

This genre consists of Synchronous PVP where the teams are not composed of equal numbers, instead, they usually consist of 1 vs 4 or more players. Most often, the one player is the "hunter" that must catch the other players.

Sovereign Games/ Empire Simulator RPGs

In these games, the player is given the role of a ruler who must take reign of their kingdom or empire. Game mechanics include management and RPG elements.



Emerging Genres

Merge Games in the Market

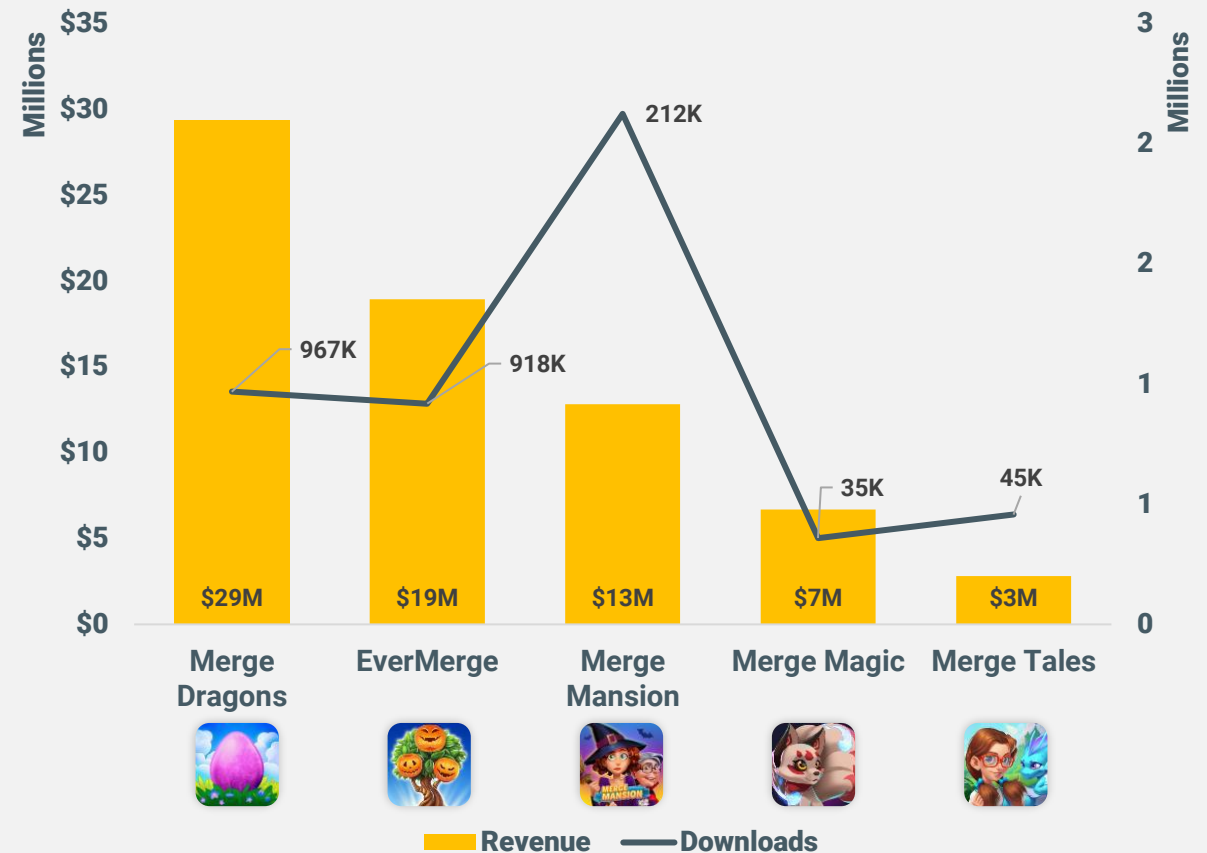
Historically, merge games have been around for a good while, even as far as back as 2014 ([2048](#) – puzzle game where you merge 2 tile numbers), however the mix of fantasy themed games with saga mapped levels, city building and pet collecting are some of the core loops that are showing up in the newer games that have been launched around 2020 and after.

While performance wise, they have yet to break the Top 50 charts, this genre might just grab our attention in the near future.

Activity in the Top 200 Chart by Revenue in Q3 compared to Q2:

- **Merge Dragons** dropped to rank 84 in Q3, from 78 earning \$4M less compared to Q2.
- **EverMerge** dropped to rank 138 from 118 with a drop in revenue of \$3M.
- **Merge Mansion** rose to **195 from 257** with an increase in revenue of \$4M.

Merge Games Performance
(Most Popular Regions – Q3)



Emerging Genres

Asymmetric Survival/Battle – Not Quite Dead Yet

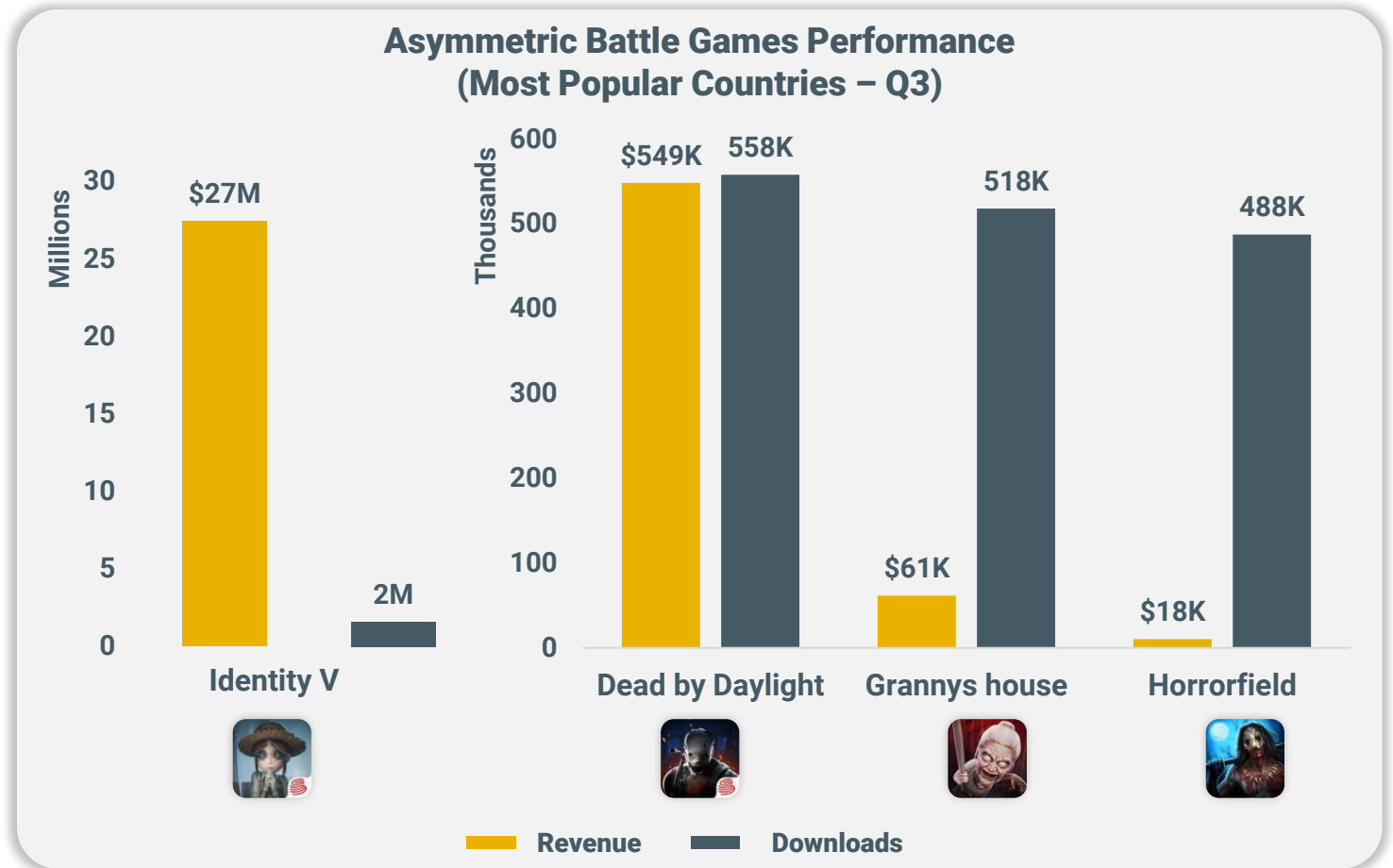
Like Merge games, Asymmetric Survival/Battle games have been around for a few years on the mobile market. Identity V was launched in 2018 on iOS/Android and is the highest earner of the bunch.

The other presented games have yet to make a dent in the market and while they benefit from being streamable on PC we don't expect to see much of them in the future.

Activity in the Top 200 Chart by Revenue in Q3 compared to Q2:

Identity V dropped to rank 92 in Q3 from rank 88 by earning \$2M less compared to Q2 2021.

Other Asymmetric Battle titles are not present in App Annie's Top 1000 chart.



Emerging Genres

Empire Simulator RPGs – Eyes on the Crown

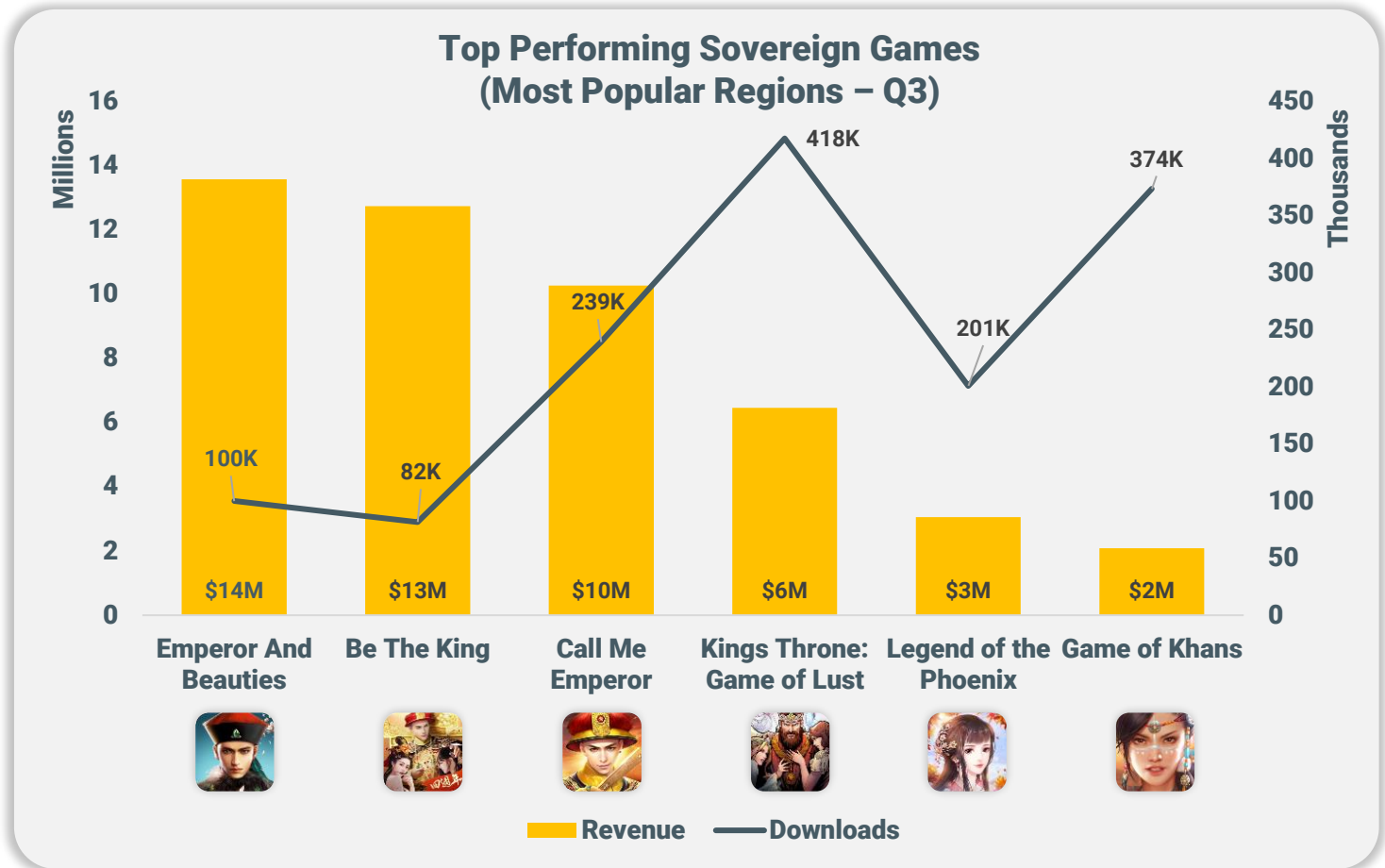
Currently App Annie tagged 71 Empire Simulator RPGs – games in which the player takes the role of a ruler over an empire or kingdom.

They have been present in the mobile gaming market for several years and some of them have good RPD metrics for example:

- Emperor and Beauties: \$24.5;
- Be the King: \$36.45;
- Call Me Emperor: \$17.87.

In terms of activity in the Top Charts, some of the top games have been fluctuating in the ranks as follows:

- Be the King dropped from rank 197 from 186 with \$357K less revenue compared to Q2;
- Emperor and Beauties decreased in rank to 187 from 178 with a loss in Revenue of \$777K;
- Game of Khans rose in rank in Q3 to 705 from position 900 in Q2 with a rise in Revenue of \$641K.



Emerging Genres

Takeaways

Most of the subgenres we talked about have been around for a while, however, it's only in the past year they managed to get everyone's attention, since we see them Soft Launching and climbing and falling from the revenue charts.

While it's unclear as to which of them will break the mould and even come close to the top 50, we still think they're worthy of attention as potential opportunity outliers.

Asymmetric Survival games will most likely not have the same degree of success as Merge games or Sovereign Simulators, while they offer a bit of fun and might pop up every October during Halloween, they have yet to monetize as rigorously as the other 2 subgenres.

Sovereign Simulators or Empire Simulator RPGs mix strategy with RPG elements and put it all together within a narrative that places the player in the role of a ruler that must manage and govern a given empire. Most of the games we looked at are set in an Eastern Asian theme with close to realistic graphics rich in medieval glamorous detail. Because of this we believe that they will most likely remain most popular in the Asian market where RPG titles in general have a pretty good foothold in the market.

Merge games seem to present the greatest level of opportunity for the western mobile gaming market. They hybridized city building with puzzle solving and while they're not up there among the giants (Candy Crush, Homescapes etc.), they seem to have the best chance of getting there.



2. Mobile Gaming Emerging Trends

2.2 Upcoming Platforms

Nintendo Switch OLED

Steam Deck

Buzzword of the Year: NFTs



Upcoming Platforms

Nintendo Switch OLED out on October 8

A bit over 4 years since the initial release of the Nintendo Switch comes the upgraded version with an increased price: the Nintendo Switch OLED.

Despite high hopes for improved performance and 4K Support, the new Switch offers a new 7" OLED screen that features more vibrant colours and higher contrast.

Other additions:

1. **LAN port** – gives users the possibility to connect the console to **wired internet, increasing speed and stability.**
2. **Doubled internal storage** – 64GB and still compatible with SD cards.
3. **Improved Speakers** – onboard stereo speakers now give enhanced audio. Moreover, in September, Nintendo added **Bluetooth headphone support.**

Takeaways:

Apart from the upgraded screen, we find it more interesting that the new Switch dock offers **a LAN port which opens more opportunities for Online Multiplayer games on the handheld console.**



Upcoming Platforms

Steam Deck – What We Know So Far

After its first reveal on July 15, 2021, the Steam Deck is now said to start **shipping in December**, however the fulfilment date is pushed as far as Q2, 2022. Reservations are available for US, UK, Canada and the EU with a \$5 deposit that can be retracted if anyone changes their mind about ordering the handheld device.

The **Steam Deck costs between \$399 and \$649** with similar performance between price points, the only difference between these devices being their storage capacity, **ranging from 64GB for the cheapest one and a max 512GB storage space** that can be **increased by getting a separate Micro SD card**.

Despite good performance even with graphic intensive games like Cyberpunk 2077 (up to 30FPS on High settings). **One of the downsides** to the Steam Deck **lies in its battery life**, with playtimes expected to range **between 4 to 8 hours** depending on what the user does on the device.

In terms of compatibility, Valve announced that [they're hiring testers](#) that will check for the device's compatibility with the tens of thousands of available games on the Steam platform.

Furthermore, the Steam Deck will allow users to change from its proprietary OS to a Windows operating system or even install other game stores like the Epic Store or Xbox Game Pass.

Takeaway: The Steam Deck shows itself as the Nintendo Switch for the PC Market and its entry should follow major changes in the handheld market since it is essentially a handheld PC more than a console.



Upcoming Platforms

Buzzword of the Year: NFTs

Most innovation fans within the gaming industry are hailing NFTs as a way to give better ownership to players, lately NFTs have begun to create a divide between game platforms that choose to welcome them or not.

While [Steam](#) clearly kicked NFTs virtual butts off the store, Epic Games seems to welcome games that use blockchain, however, a bit tentatively. Epic Games is [willing](#) to work with early developers while offering some number of limitations.

Despite this, Epic's CEO, Tim Sweeny is reticent about the blockchain technology, [saying](#) that the "whole field is currently tangled up with an intractable mix of scams, interesting decentralized tech foundations, and scams."

Meanwhile, there's plenty of projects getting funded [left](#) and [right](#), meaning that there's plenty of support and curiosity around NFTs. The situation is not clear cut, however, there's still plenty of questions to be asked: How will developers ensure a fair playing field among for gamers? How and where will users be able to actually purchase NFTs? Will they have their own 3rd Party marketplace, or will they have their own in-game store? When will we see state policy intervene directly?

Takeaway:

Currently the idea of play to earn is one of the desirable outcomes from developers to players, however, we could argue that most nay-sayers believe NFTs will turn games into pay-to-earn just as some free to play games turned into pay to win titles.



Upcoming Platforms

Takeaways

The Nintendo Switch is one of the more successful handheld consoles currently out there with over 89M in Hardware Sales throughout its lifetime. While the new OLED version is not a big upgrade, [rumors](#) of a new Switch have started popping up.

Despite that, the Steam Deck seems to have the upper hand in almost every regard except the price point and exclusive titles.

However, the preorders have already been [sold out](#) and we think that, while the Switch already has a solid fanbase and plenty of exclusive titles, it's very likely that the Steam Deck will be reigning over the handheld console market in the years to come. Despite this another scenario that might take place is one where we will see a divided fanbase between Switch and Steam Deck Fans, much like we see between Xbox and PlayStation.

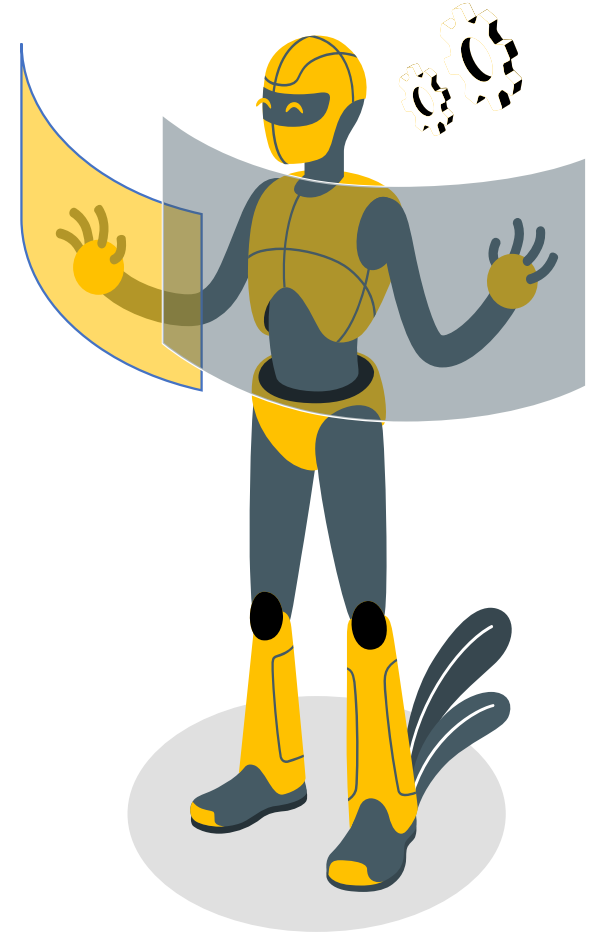
In the meantime, games with NFTs are on the way with plenty of projects being funded. The only questions that remain is how these games will play out for gamers, will it be a fair environment where the promised play-to-earn selling point? Or will we see players complaining about tedious grinding times in a pay-to-earn world?



2. Mobile Gaming Emerging Trends

2.3 Art Styles

Hybridized Art Styles



New Art Styles

Hybridized Art Styles

As developers are keen to the post-IDFA world and hybridized games are the new form of innovation, it comes to no surprise that art styles are crossing the genre boundaries.

Normally, 4X strategy games stick to the realistic art style and graphics, however, two prime examples reveal that, in the mobile world at least, 4X games can also have a vibrant, colorful cartoony aesthetic.

Two prime examples of this are Rise of Kingdoms (Ranked #9 in Q3 by Revenue in Most Popular Countries) and Top War (Ranked #30 in Q3 by Revenue in Most Popular Countries).

The idea is to attract a broader audience into the realm of 4X strategy therefore not limiting themselves to mid or hardcore gamers, but casual ones alike.



2. Mobile Gaming Emerging Trends

2.4 Trending Features

The Hybrid Practice

Blending Mid-Core Features into Casual Games

In the Mix – Merge Mansion Mystery Solving

In the Mix - 4x & RPG – State of Survival Walking Dead



Trending Features

The Hybrid Practice

One of the most noticeable trends in mobile gaming **is the hybridization of casual games**. It's very rare to see a completely new genre to show up within the gaming market, however we can see clear patterns in trending features within older established ones.

The clearest examples is within **Casual games that incorporate Mid-Core features in order to engage and increase stickiness among users**. This is due to the ever-increasing competitiveness of the mobile gaming market, with new game titles emerging every month. According to Game Refinery, the main reasons to add meta-elements in a Casual game are:

1. To set the game apart from its competitors:

Since mobile games are already well positioned towards consumers, the time has come for new games to bring in new layers that will create a more in-depth experience for new and veteran players alike.

2. Bring in more monetization sinks:

Most casual games feature time-gates or extra lives, by doing so, players end up in spending Hard Currency to speed things up or continue playing.

However, adding collectible items or customizable elements can bring more value to players without affecting core gameplay.

3. Expand on gameplay incentives:

Adding new goals can give players an extra appeal by having extra objectives along with the game's core loop. Instead of just solving puzzles, players can be given a story narrative, extra decoration options in order to drive their motivation to progress through the game. This is especially important if a game wants to appeal to more than just one cohort of players.



Trending Features

Blending Mid-Core Features into Casual Games

Meta features that we'd normally see in mid-core games have started to show up in Casual games:

Light competitiveness between players – casual players mustn't be overwhelmed with deep layers of PVP; however, they can still enjoy vying for a top position on a Leaderboard;

Guild Mechanics - bring players together, give a sense of belonging and gets players that have similar play times and habits together in a community – further adding co-op events and team competitions gives extra layers for the community to interact with;

Recurring events with special playing modes – these can help break the monotony and can incentivize players to return to the game by rewarding them with extra content;

Season Pass – Casual games in the top charts are using this system (inspired from Battle Pass systems from games like Fortnite) to give players long term goals and a sense of accomplishment by giving exclusive rewards. Season Passes also make great use of FOMO by introducing unique and exclusive events that players cannot simply gloss over. Season Passes do not really affect the core gameplay, increase retention and boost monetization, so there is no surprise as to why they are adopted over so many titles.



Trending Features

In the Mix – Merge Mansion Mystery Solving

We all know the Who-dunnit styled ad trailers filled with twists about the seemingly sweet grandma that Maddie, our protagonist, had to deal with before taking over the mansion as it's caretaker.

It's the kind of video ad we all remember along with Raid Shadow Legends as well, they both took the route of getting our attention with more than just simple gameplay shots. Both examples used a humorous approach at getting our attention.

Merge Mansion is much closer to games like Candy Crush or Homescapes where the player instead of matching similar objects, must merge them in order to solve puzzles and clean the mansion.

Merge Mansion is a clear example of how developers will use a murder mystery ad to capture our curiosity and then hybridize 2 game genres into their own take of a Casual game.



Trending Features

In the Mix - 4x & RPG – State of Survival

State of Survival popped up as far as the Top 10 charts in the US back in September with a Revenue of \$16M. In Q3, the game earned a hefty \$92M and it was also downloaded 4M times.

Walking Dead's State of Survival is a great example of how 4X strategy can find success by mixing it up with RPG layers.

Players can build and upgrade their base and collect new characters, that can be sent out on exploration missions, ending up in PvE line defense gameplay.

4X games have been available in mobile gaming for a while, but only a few stand out and State of Survival is one of those games that managed to set itself apart due to its successful hybridization of game features.

Takeaway:

Creating a new game genre from thin air can happen (albeit rarely), but game developers will find it easier to use already familiar features in order to discern themselves from other cookie-cutter titles.



Trending Features

Takeaways

While new game genres are most likely going to take us by surprise, some trends can be tracked and noticed before they establish themselves in the norm.

Casual games have been around for a while and so it makes sense for them to evolve in a certain direction. With the post IDFA world and increasing competition, game developers must look at new ways to attract the player's attention to their game AND keep them there for as long as possible.

While acquiring users will be more challenging, finding new ways to keep players engaged is more and more important for a game's success.

In the meantime, the alternative for IDFA could be SKAdNetwork. Through it, marketers can check the ad quality, albeit in a small 24-hour window, when users make a purchase, for example.

Another trend to keep an eye out for is the emergence of licensed IPs moving into the mobile world with titles like Crash Bandicoot: On the Run, Contra Returns and even the previously mentioned Walking Dead based game – State of Survival.

Cross-platform and Cross-play will also play a crucial role into convincing PC players to make the move to Mobile.



Appendix

[App Annie](#) Dashboard - Estimates;

[GameRefinery](#) – What Has Happened in the Mobile Games Industry;

[Tech Advisor](#) – Nintendo Switch OLED;

[PC Gamer](#) – Steam Deck Price Release Date Specs;

[GameRefinery](#) – Taxonomy Update;

[GameRefinery](#) – 2021 Casual Game Trends

[BGR](#) – Some Steam Deck preorders won't ship until September 2022;

[The Verge](#) - Valve bans blockchain games and NFTs on Steam, Epic will try to make it work;

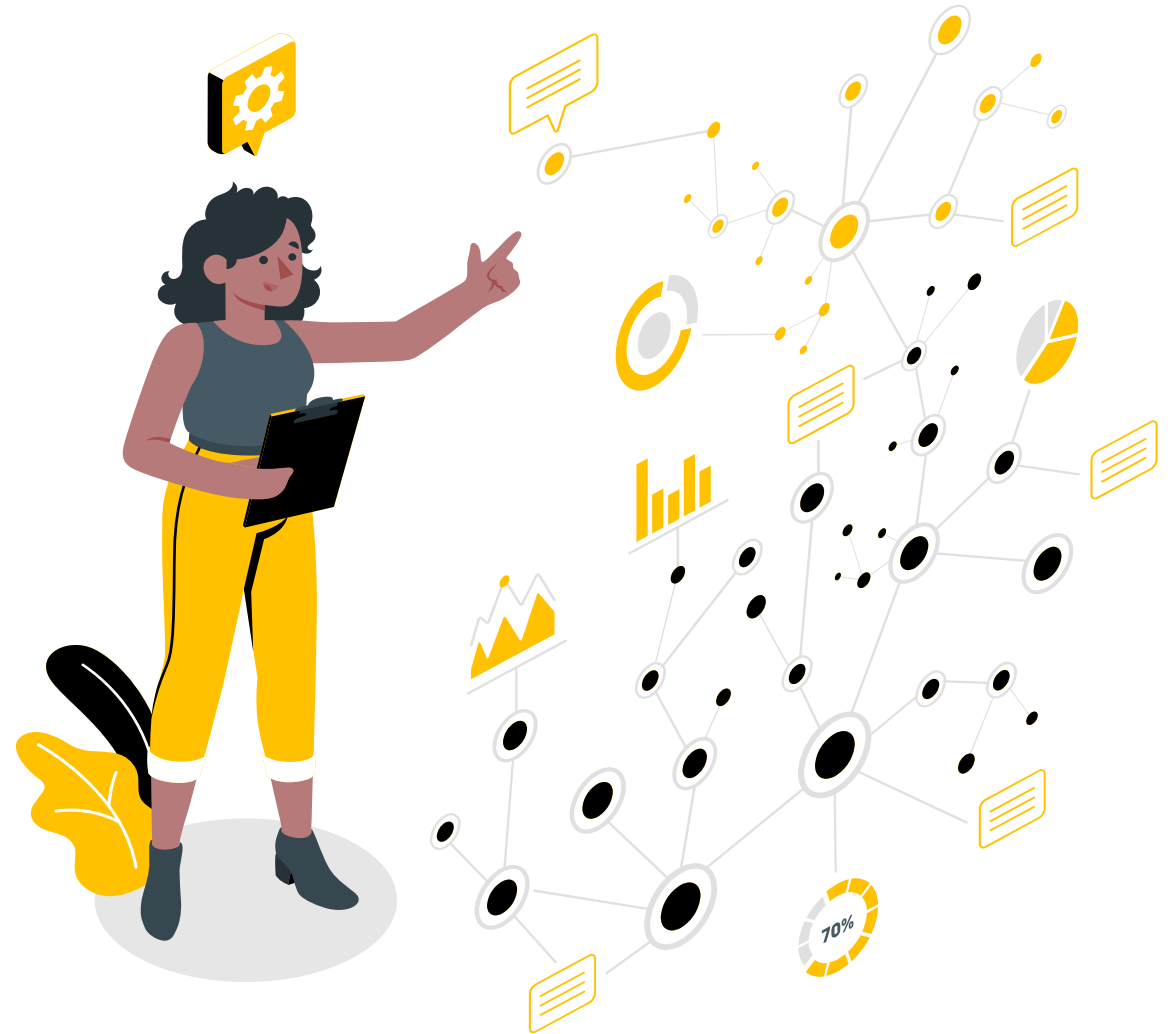
[Ledger Insights](#) - A16z leads \$152 million funding for Play-to-earn NFT game Axie Infinity;

[Sensor Tower](#) - European Consumer Spending in Mobile Apps Grew 21% in Q3 2021 to \$4.6 Billion;

[Drake Star Partners](#) – Global Gaming Industry Update, September 2021;

[Pocket Gamer Biz](#) – Mobile Games Developer Trends Survey;

Template design - [SlidesGo](#).



Thank you!

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