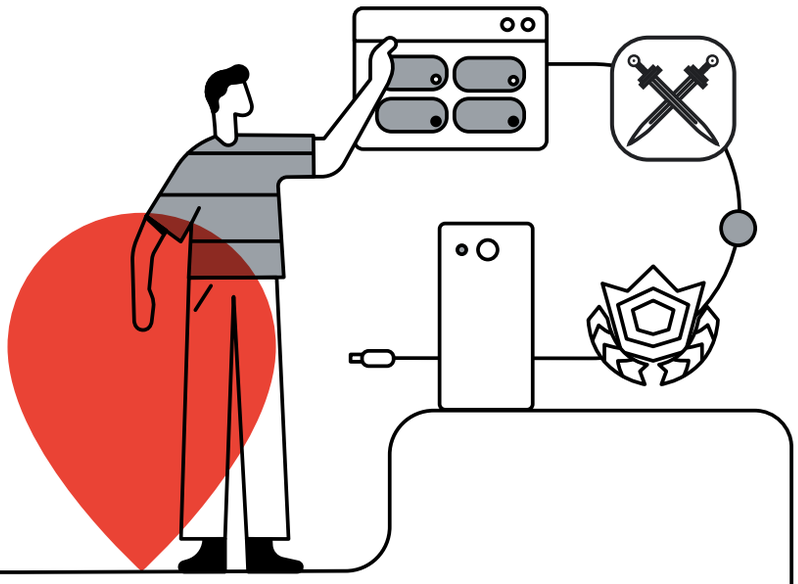
For the win: Breaking down the preferences of Asia's mobile gamers

In the final installment of our series of insights on Asia's gaming market — commissioned and organized with Niko Partners — we explore the region's top-grossing mobile games and genres in the first half of 2020 to understand how evolving player preferences, culture, and game developers have uniquely shaped the landscape of each country.



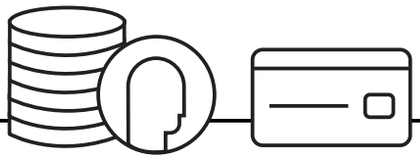
China

Asia's **No. 1** mobile games market in 2019

$18.5B in total revenue

Leading the way from PC to mobile

China was the first country to launch **mobile adaptations of popular PC games**. Within a few years, China's mobile power users showed that existing titles — e.g., "**Fantasy Westward Journey**" — can be just as, if not more, successful on mobile.



The importance of local partnerships

Chinese development teams have consistently dominated by tapping into **local art styles, heroes**, and **storylines**.

4 of China's top 10 mobile games are based on legends from the Three Kingdoms.*

**A widely romanticized period in Chinese history (220–280 AD) where three factions fought for control of the country*

While the **ratio** of international standard book numbers (**ISBN**)* granted to foreign games has remained somewhat constant, the **absolute value is declining**. Domestic partnerships are **required by law** to publish foreign games in China and only a small number of games are approved every year — for overseas developers, **finding the right domestic publisher is a must**.

**Government-issued publishing license used for content including games*

Tencent and **NetEase** accounted for **nine** of the country's **top 10 titles** in 2019. But publishers from outside of China — **primarily from Japan** — have recently established a larger presence.

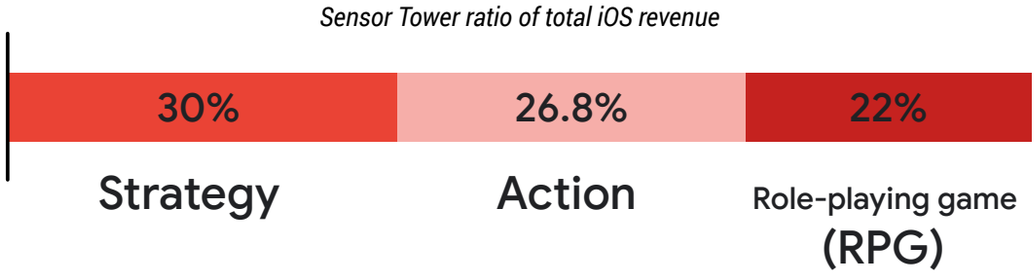
of China's imported games in 2019 were developed in Japan.

A shift to competitive genres

While massively multiplayer online role-playing games (**MMORPGs**) are still popular in China, local developers have expanded into a **variety of genres** over the past few years.

China's top mobile game genres

Sensor Tower ratio of total iOS revenue



In 2016, **seven** of China's biggest mobile hits were **MMORPGs** adapted from popular PC games. But recently, **three** of those titles were replaced by multiplayer online battle arena **(MOBA)** and **battle royale** games with competitive elements.

China's top-grossing mobile games*

1. **"Honor of Kings"** — *Local* · *MOBA*
2. **"Peacekeeper Elite"** — *Local* · *Battle royale*
3. **"Romance of the Three Kingdoms: Strategy Edition"** — *Local* · *Strategy*
4. **"AFK Arena"** — Local · Auto battler
5. **"Fantasy Westward Journey"** — Local · RPG
6. **"Immortal Conquests"** — Local · Strategy
7. **"Onmyoji"** — Local · RPG
8. **"New Swordsman M"** — Local · RPG
9. **"Shenwu 4"** — Local · RPG
10. **"QQ Speed"** — Local · Racing

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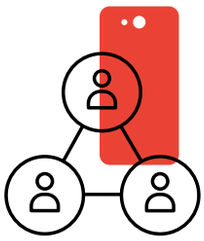
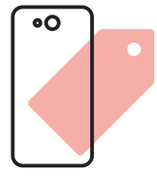


Entice a local audience

Striving for mass reach from the most dominant publisher isn't always the best solution. Take your time to find an ideal partner depending on your game's primary platform and genre, and the specific audiences you want to reach.

Japan

Heavy anime and console history



As the home base for **Nintendo** and **Sony,** Japan's influence on gaming culture worldwide spans decades.

Many of Japan's most popular, locally developed titles are **RPGs** that feature Anime, Comic, and Games (**ACG**) elements.

Asia's No. 2 mobile games market in 2019

$11.6B in total revenue

Japan's top mobile game genres

Sensor Tower ratio of total iOS + Google Play revenue

Considering most Japanese gamers grew up enjoying *anime* and *manga,* it's no surprise that **local developers continue to dominate** by tapping into those aesthetics.

Top Japanese game development studios — **Square Enix, Konami, Bandai Namco,** and **SEGA** — are well-versed in launching hit PC and console games. They've continued to build on that success by adapting the most popular titles for mobile.

Since 2016, at least 5 of Japan's **top 10** mobile games every year have used **ACG art styles.**

8 of Japan's **top 10** mobile games are **based on licensed PC and console titles.**

Japan's top-grossing mobile games*

1 — **"Monster Strike"** — *Local* · *Puzzle*

2 — **"Fate/Grand Order"** — *Local* · *RPG*

3 — **"Dragon Quest Walk"** — *Local* · *Augmented reality (AR)*

4 — **"Knives Out"** China · Action

5 — **"Puzzle and Dragons"** Local · Puzzle

6 — **"Professional Baseball Spirits A"** · Local · Sport

7 — **"Pokémon GO"** U.S. · AR

8 — **"Dragon Ball Z: Dokkan Battle"** · Local · RPG

9 — **"Princess Connect! Re:Dive"** · Local · RPG

10 — **"Houchi Shojo - Hyakka Ryoran no Moehime Tachi"** Local · RPG

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Entice a local audience
Incorporate pop culture elements from well-known movies, *manga*, and *anime*, and take note of historically successful PC and console titles to understand what kept gamers coming back.

South Korea

Birthplace of esports and PC bang culture

South Korea's rich **PC gaming history**, early investment in **5G mobile service**, and widespread **internet cafes** (icafes, locally known as "**PC bang**") had a lasting impact on gamers' preference for more immersive, social, and competitive titles.

Asia's **No. 3** mobile games market in 2019

$5.34B in total revenue

South Korea's top mobile game genres

Sensor Tower ratio of total iOS + Google Play revenue

With such a close connection to classic PC titles like "**Lineage**" — the first-ever MMORPG on PC — South Korean gamers are still loyal fans of the genre.

More than half (57.9%) of South Korea's total mobile games revenue in H1 2020 was driven by RPGs.

Local developers have taken most of the country's top spots by tapping into players' familiarity with PC gaming.

At least half of South Korea's top 10 games since 2016 have been **based on well-known PC titles.**

Competitive play spreads to mobile

As South Korean gamers have become more skilled and competitive, they've shifted their attention to more **challenging, core titles** that bode well for **esports competition.**

None of South Korea's top mobile games in H1 2020 were **casual titles.**

Foreign developers branching out beyond RPGs

Developers from outside South Korea have recently brought a wider range of genres into the market, including **strategy, auto battler,** and **sports titles.**

South Korea's top-grossing mobile games*

1. "Lineage 2 M" — Local · RPG
2. "Lineage M" — Local · RPG
3. "Rise of Kingdoms: Lost Crusade" — China · Strategy
4. "AFK Arena" — China · Auto battler
5. "V4" — Local · RPG
6. "Miracle Sword" — Local · RPG
7. "Lineage 2 Revolution" — Local · RPG
8. "Blade and Soul Revolution" · Local · RPG
9. "A3: Still Alive" — Local · RPG
10. "FIFA ONLINE 4 M by EA SPORTS™" · U.S. · Sport

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Entice a local audience

Give gamers the opportunity to compete on titles that tap into the country's love of esports — especially on mobile, where tournaments are attracting serious attention and investment from advertisers.

India

Open doors for local developers

With more than **400 million smartphone users** (second only to China), India is one of the world's fastest growing mobile games markets — driven by affordable **4G service, low-cost smartphones,** and a **young** and **increasingly savvy** gaming audience.

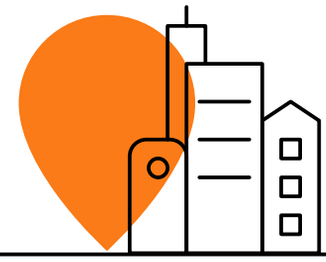
65%

of India's population in 2019 was under the age of 35.

India's local game developers are relatively new to the industry, so teams from Asia and elsewhere around the world have had more recent success.

Only 2 of India's top mobile games in 2020 were developed locally.

However, India's **recent ban on Chinese apps and games** — including global hits "PUBG Mobile" and "Mobile Legends" — presents local developers with an opportunity to **cultivate local talent** and develop **new titles inspired by Indian culture.**



Keep it "lite"

A large number of Indian gamers use lower-spec mobile devices, so "lite" versions of popular games are usually more successful.

The "lite" version of "PUBG Mobile" accounted for 66% (36M) of the game's total downloads in India.*

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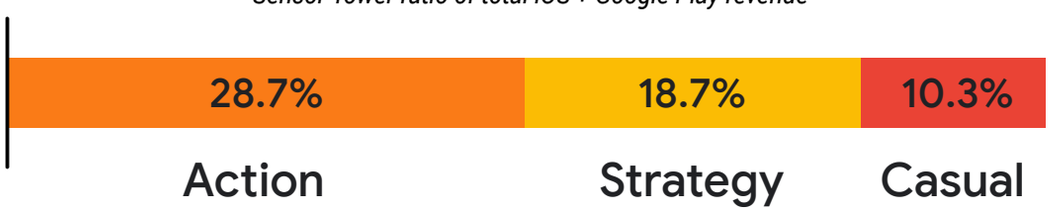
An early esports opportunity

Prior to India's ban on Chinese games, the "**PUBG Effect**" — fast-rising adoption of high-performance gaming smartphones — pointed to players' **growing interest** in **complex, core genres** on mobile.

India's top mobile game genres

Sensor Tower ratio of total iOS + Google Play revenue



Many of India's leading mobile games have **social, online,** and **competitive** components that make them **ideal for esports** — still a relatively undeveloped sector in the country with huge potential for future growth.

India's top-grossing mobile games*

1. "PUBG Mobile" — *China* — *Battle royale*
2. "Garena Free Fire: Rampage" — *Singapore* — *Battle royale*
3. "Coin Master" — *Israel* — *Casino*
4. "Teen Patti - Indian Poker" — Local · Casino
5. "Candy Crush Saga" — Malta/U.S. · Casual
6. "Call of Duty®: Mobile" — U.S. · Shooter
7. "Clash of Clans" — Finland · Strategy
8. "Teen Patti Gold – 3 Patti, Rummy, Poker Card Game" · Local · Casino
9. "Gardenscapes" — Russia · Casual
10. "Mobile Legends: Bang Bang" · China · MOBA

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Entice a local audience
Take inspiration from Indian culture, traditions, and folklore, make sure your game can run smoothly on low-spec devices, and explore opportunities to spark new competition in the country's growing esports universe.

Southeast Asia

Connected by competition and community

Southeast Asia is an especially diverse region with a variety of cultures, communities, and characteristics. It's also home to the **most engaged mobile internet users** in the world.

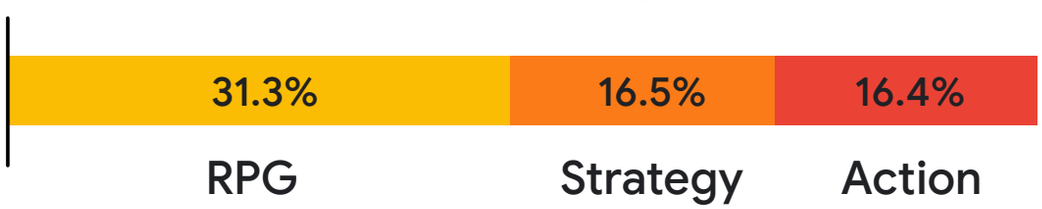
Mobile games in Southeast Asia outpaced PC and console in both total revenue and downloads in 2019.

Community is a notable common motivator among gamers in Southeast Asia — many of the region's top-grossing titles feature **social elements** and **team-based gameplay.**

of gamers in Southeast Asia prefer to play with friends.

Southeast Asia's top mobile game genres

Sensor Tower ratio of total iOS + Google Play revenue



Southeast Asian gamers' strong desire for community play — combined with government policies and support across the region — has helped **esports titles and tournaments** thrive.

5 of Southeast Asia's top mobile games in 2019 were esports titles.

In the last five years, non-Asian developers have been outranked by teams in the region with a **closer ear and eye on local preferences.**

Southeast Asia's top-grossing mobile games*

1 — *Singapore* — **"Garena Free Fire: Rampage"** — *Battle royale*

2 — *China* — **"Mobile Legends: Bang Bang"** — *MOBA*

3 — *China* — **"Rise of Kingdoms: Lost Crusade"** — *Strategy*

4 | **"Lineage M"** South Korea · RPG

5 | **"Honor of Kings/Arena of Valor"** · China · MOBA

6 | **"PUBG Mobile"** China · Battle royale

7 | **"Call Me Emperor"** China · Strategy

8 | **"MU"** South Korea · RPG

9 | **"One Punch Man: The Strongest"** · China · RPG

10 | **"AFK Arena"** China · Auto battler

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Entice a local audience

Culture and community are particularly important parts of daily life in Southeast Asia. Be mindful of respecting local religions, customs, and traditions when promoting games in each country, and incorporate elements that allow players to share the experience with friends and fellow gamers.

Start local to grow global

Looking at the top games across the region, it's clear that success in one country doesn't guarantee success in another.

Appealing to local audiences requires keeping up with trends, preferences, and regulations in each country, learning from domestic publishers and influencers, and experimenting with new and popular genres to deliver experiences that entice the gamers you want to reach.

Sources

1 Google/Niko Partners, "Level Up: A Guide to Succeed in Asia's $70B Gaming Market," June 2020.