IP-Based Mobile Games: Overcoming UA Challenges With Franchise Power

Newzoo Report, 2022

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IP-Based Games Are Coming to Mobile
Foreword

The origin of **games based on popular entertainment franchises** *(referred to in this report as IP-based games)* can be traced all the way back to the original Atari console. Compared to PC and console, mobile gaming often has **shorter development cycles, lower development costs, and higher reach.** Therefore, modern-day IP holders often choose mobile as their go-to-platform for bringing beloved franchises to gaming.

The mobile game market continues to outperform PC and console as the biggest and fastest-growing gaming segment. By 2022, more than half (53%) of the global games market revenue will come from the mobile platform.

For years, successful mobile developers relied on user tracking data to operate their live games and acquire audiences for new games. However, both **tracking and targeting are limited under Apple's ATT (App Tracking Transparency)** policies, forcing publishers to find alternative ways to market their games. By leveraging well-known entertainment franchises to create an IP-based game, publishers are aiming to **boost organic installs and lifetime revenues**.

To shed light on how IP-based games perform, we analyzed 650 IP-based mobile games based on data from our partner Airnow, of which 510 were active on the App Store and Google Play as of 2021. What's more, we conducted a consumer survey across key mobile markets (i.e., U.S., Germany, Japan, and China) to understand mobile gamers' attitude toward IP-based games on mobile.

This report contains the findings of our analysis and the survey. It also includes our analysts' commentary on key success drivers for top games globally and locally in the West and the East. Most excitingly, we feature stakeholder spotlights, based on interviews with key companies that are bringing IP to mobile games.

Please note in the quantitative analysis of this report, we focus on entertainment franchises originally from movies, TV, literature, manga, comics, toys, etc. Our data *excludes franchises that originated as games such as Pokémon, Call of Duty, and League of Legends*. We believe that adopting entertainment IP to (mobile) gaming is fundamentally different than developing a mobile game based on an existing gaming franchise.

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1. Overview of IP-Based Mobile Games

Revenue, downloads, and growth analysis

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Publishers Leverage Famous IP to Boost Organic Installs
Among top downloaded games launched in 2021, only 1 is not IP-based

Top Downloaded New* Non-Hypercasual Games in 2021
Among Top 100 Downloaded iOS Games | *Games Released in 2021

Rank	Game	Developer	Publisher	IP-Based? (Y/N)	Original IP
1	Wild Rift	Riot Games	Riot Games	Y	League of Legends
2	Rocket League Sideswipe	Psyonix	Psyonix	Y	Rocket League
3	Crash Bandicoot: On the Run!	King	King	Y	Crash Bandicoot
4	Pokémon Unite	Tencent	The Pokémon Company	Y	Pokémon
5	Battle of Golden Spatula [CN]	Riot Games	Tencent	Y	League of Legends
6	Soccer Super Star	Real Free Soccer	Real Free Soccer	N	N/A
7	Mole's World [CN]	Game.61	Leiting Games	Y	Mole's World
8	Cookie Run: Kingdom	Devsisters	Devsisters	Y	The Gingerbread Man
9	Harry Potter: Magic Awakened	Warner Bros. & NetEase	NetEase	Y	Harry Potter

Data is pivotal to success in mobile gaming, enabled through tracking and targeting of players. However, the past year has seen further shifts around privacy and tracking in the mobile space, creating challenges for mobile companies. Perhaps one of the most influential changes is Apple's **ATT (App Tracking Transparency)**, which was launched in late April 2021.

As a result, mobile game publishers are forced to find alternative ways to market their games. One of those alternatives is IP-based games. Simply put, **developers and publishers are aiming to boost organic installs by leveraging well-known franchises to create IP-based games.**

Together with Airnow, our mobile intelligence partner, we looked all the new iOS games in 2021 that hit the top 100 download chart. We found that **only one game** (Soccer Super Star) **is *not* based on an existing franchise**, proving that **strong IP is one of the key drivers for effective UA in (mobile) gaming**.

Please note: our analysis excludes hypercasual games which naturally attract high downloads.
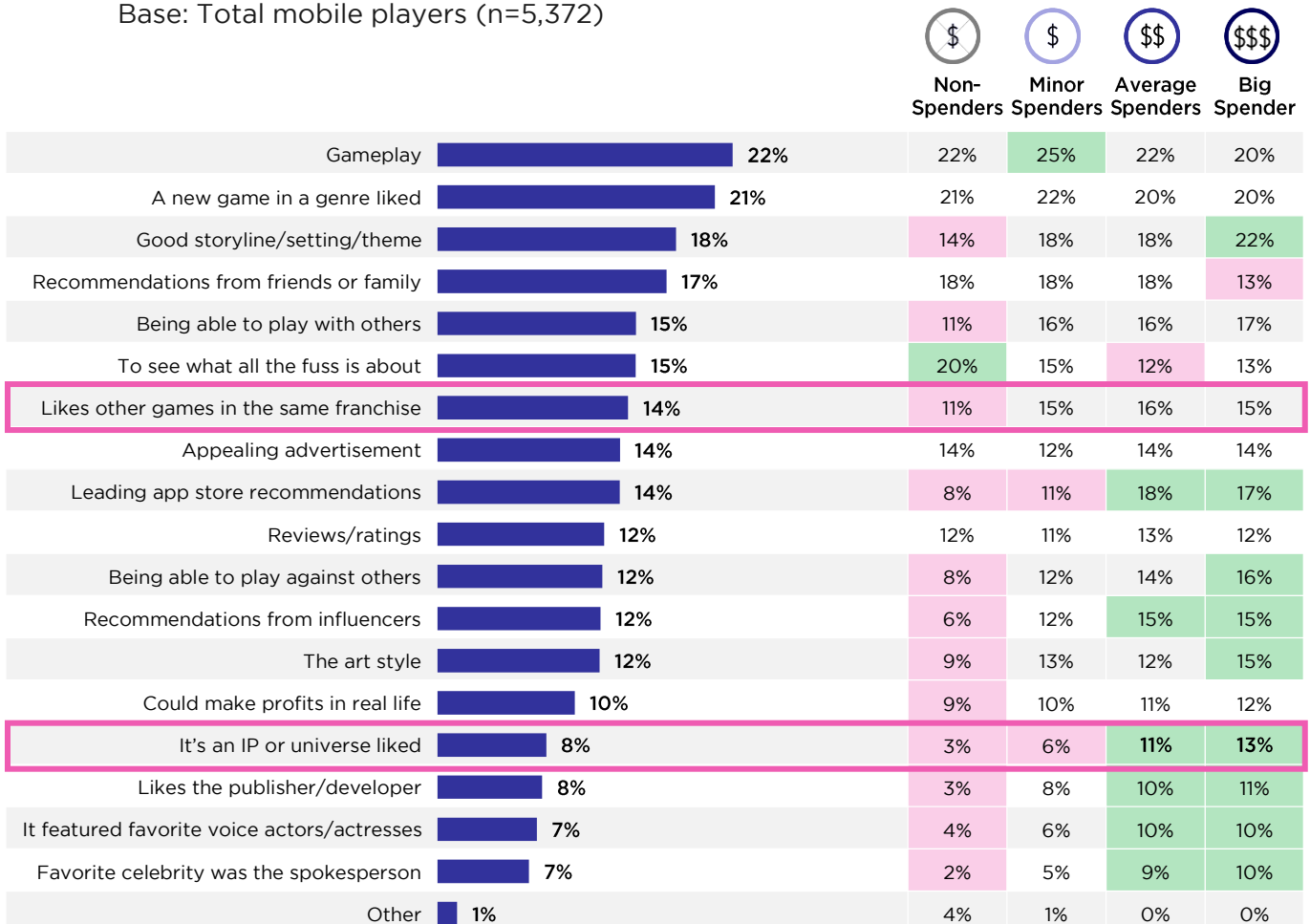
Source: Airnow

High Spenders on Mobile Are Drawn to IP-Based Games

In addition to its positive impact on a game's user acquisition, strong IP plays a key role in attracting high spenders, potentially leading to higher revenues for IP-based mobile games. Our Consumer Insights in the U.S., Germany, Japan, and China suggest big spenders (who spend >$25/month on mobile games) and average spenders ($5-$25/month) are more likely to download a game if it's based on an existing franchise or IP/universe that they like. In fact, **high spenders** (>$5/month) **are 2.84 times more likely to download a game if it's based on an IP/universe they like**, compared to low spenders (<$5/month). This is the **biggest difference** between the two spender groups when it comes to motivations to download mobile games.

Clearly, **IP is an effective tool for publishers and developers to acquire higher spenders in mobile gaming**.

Q. **Consider your recently downloaded games, what motivated you to choose new mobile games?**
Base: Total mobile players (n=5,372)

		$ Non-Spenders	$ Minor Spenders	$$ Average Spenders	$$$ Big Spender
Gameplay	22%	22%	25%	22%	20%
A new game in a genre liked	21%	21%	22%	20%	20%
Good storyline/setting/theme	18%	14%	18%	18%	22%
Recommendations from friends or family	17%	18%	18%	18%	13%
Being able to play with others	15%	11%	16%	16%	17%
To see what all the fuss is about	15%	20%	15%	12%	13%
Likes other games in the same franchise	14%	11%	15%	16%	15%
Appealing advertisement	14%	14%	12%	14%	14%
Leading app store recommendations	14%	8%	11%	18%	17%
Reviews/ratings	12%	12%	11%	13%	12%
Being able to play against others	12%	8%	12%	14%	16%
Recommendations from influencers	12%	6%	12%	15%	15%
The art style	12%	9%	13%	12%	15%
Could make profits in real life	10%	9%	10%	11%	12%
It's an IP or universe liked	8%	3%	6%	11%	13%
Likes the publisher/developer	8%	3%	8%	10%	11%
It featured favorite voice actors/actresses	7%	4%	6%	10%	10%
Favorite celebrity was the spokesperson	7%	2%	5%	9%	10%
Other	1%	4%	1%	0%	0%

Highlighted cells indicate significant differences versus the average.
Green: statistically higher vs. average; red: statistically lower vs. average

IP-Based Games Have a Bigger Presence in Asia's Top-Grossing Mobile Game Charts

In the U.S., mobile adoptions of existing game franchises are prominent

Number of IP-Based Games Among Top 20 Grossing Titles

U.S., Japan, and China | 2021

🇺🇸 3 game IP-based

1. Roblox	6. PUBG MOBILE	11. Pokémon GO	16. Cashman Casino
2. Candy Crush Saga	7. Clash of Clans	12. Call of Duty®: Mobile	17. Candy Crush Soda Saga
3. DoubleDown™ Casino	8. Jackpot Party	13. Garena Free Fire	18. Clash Royale
4. Homescapes	9. Slotomania™	14. Gardenscapes	19. Fishdom
5. Genshin Impact	10. Bingo Blitz™	15. State of Survival	20. Coin Master

🇯🇵 8 game IP-based   4 non-game IP-based

1. Uma Musume Pretty Derby	6. Knives Out	11. Ensemble Stars	16. eFootball PES 2021
2. Monster Strike	7. Pokémon GO	12. Project Sekai: Colorful Stage feat. Hatsune Miku	17. Dragen Quest Tact
3. Professional Baseball Spirits A	8. Genshin Impact	13. Idle Girl	18. LINE: Disney Tsum Tsum
4. Fate/Grand Order	9. Dragon Quest Walk	14. Disney: Twisted Wonderland	19. Romancing SaGa Re: Universe
5. Puzzle & Dragons	10. Dragon Ball Z Dokkan Battle	15. Mafia City	20. Jikkyō Powerful Pro Yakyū

🇨🇳 4 game IP-based   8 non-game IP-based

1. Peacekeeper Elite	6. Moonlight Blade Mobile	11. Infinite Border	16. QQ Speed Mobile
2. Honor of Kings	7. Rise of Kingdoms	12. Harry Potter: Magic Awakening	17. JJ Doudizhu
3. Fantasy Westward Journey	8. Immortal World	13. Onmyoji	18. Life After
4. Three Kingdoms Strategy Edition	9. Westward Journey	14. Shenwu 4	19. Doula Continent: Soul Master Duel
5. Genshin Impact	10. CrossFire Mobile	15. Naruto Mobile	20. Wendao

Source: Airnow

Publishers Show Increasing Interest in IP-Based Games

Due to the pandemic and China's game license freeze, IP-based game launches on mobile slowed down in 2021

Number of IP-Based Mobile Games Launched Each Year

2016-2021 | Global | By Franchise Medium

● TV   ● Manga   ● Literature   ● Comics   ● Film   ● Other
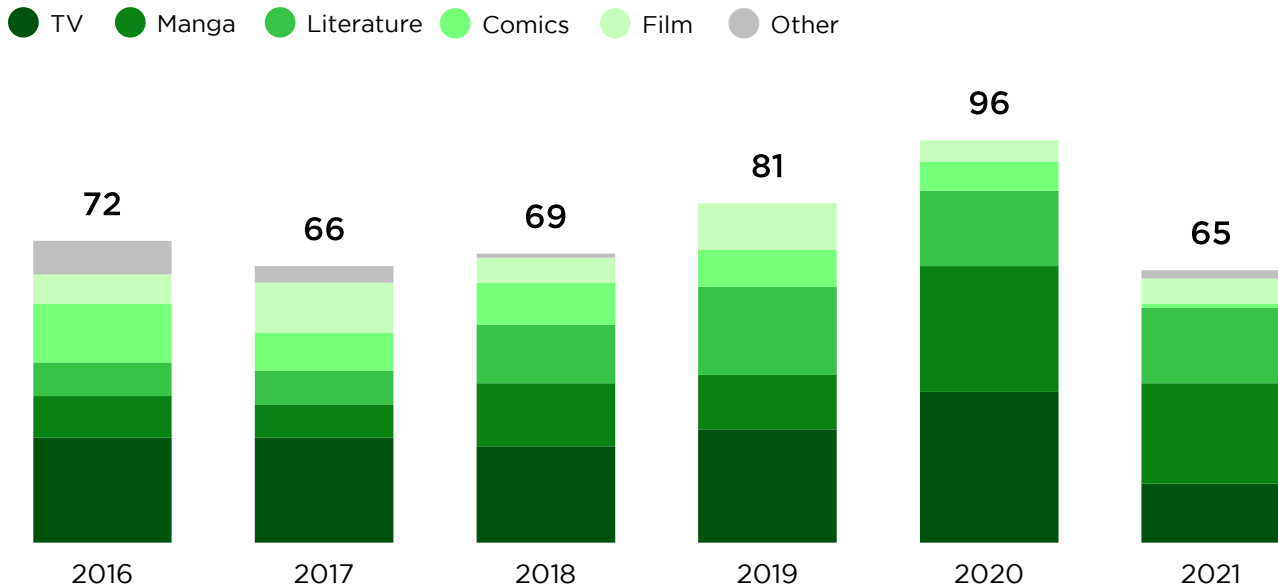
Please note that games based on existing gaming franchises such as Pokémon, Call of Duty, and League of Legends are excluded in our data and analysis.

Developers/publishers are increasingly **leveraging recognizable IP as an effective tool to acquire users and to maintain high LTVs for their games**. Among all the IP-based mobile games released from 2016 to 2021, TV-based IP is the most common (33%), followed by manga (22%) and literature (19%).

2020 saw a big jump from previous years in the number of IP-based games released on mobile. This jump could be **mobile game developers' response to Apple's announcement of the IDFA removal.** The changes made acquiring users became more difficult and IP was a viable solution. However, there was a slowdown in entertainment IP-based mobile games in 2021. We believe there are four major reasons that caused the slowdown.

Potential reasons for the slowdown in 2021:
1. **COVID-19-resulted delays** in TV, film, game productions, and other entertainment industries led to delays in IP-based mobile game releases.
2. **China**, one of the leading markets in IP-based mobile games by popularity and revenue, **stopped approving games** since July 2021 (resumed in April 2022).
3. **Mobile game production cycles became longer** in line with increasingly complex and immersive games (more akin to AAA console and PC).
4. Mobile games increasingly moved (and are still moving) toward **live services**; therefore, publishers of existing IP-based games focused on live-ops of their existing titles, especially after the market boom of 2020.

Western IP Attracts More Downloads Globally
Eastern IPs outperform in revenue, driven by spending in China & Japan

Top 10 IP-Based Mobile Game Franchises (By Downloads)

Based on 650 entertainment IP-based games* | 2021 | Global

Rank		Franchise	IP Origin
1	MARVEL	Marvel	Comics
2	CN	Cartoon Network	TV
3	Disney+	Disney**	Film
4	Harry Potter	Harry Potter	Literature
5	DESPICABLE ME	Despicable Me	Film
6		Miraculous: Tales of Ladybug & Cat Noir	TV
7		Strawberry Shortcake	TV
8		SpongeBob SquarePants	TV
9		PAW Patrol	TV
10		Jurassic Park	Literature

*Mobile games that are based on existing game franchises are excluded from the analysis.
**For Disney, we have only included original Disney IP and not the extended Disney universe (including Marvel and Star Wars).

Overall, **global/Western franchises attract more downloads**, thanks to their large fanbases across the world. Five out of the 10 most downloaded franchises in 2021 are originally **TV series/programs**; however, the downloads don't necessarily translate to high revenue. The target audiences of these TV franchises are young children and therefore, adapted games are usually **casual games** with basic monetization.

Top 10 IP-Based Mobile Game Franchises (By Revenue)

Based on 650 entertainment IP-based games* | 2021 | Global

Rank		Franchise	IP Origin
1		Umamusume: Pretty Derby	Manga
2	MARVEL	Marvel	Comics
3		Romance of the Three Kingdoms	Literature
4	DRAGON BALL	Dragon Ball	Manga
5	JOURNEY TO THE WEST	Journey to the West	Literature
6	Disney+	Disney**	File
7	Harry Potter	Harry Potter	Literature
8	STAR TREK	Star Trek	TV
9		Doula Continent	Literature
10	GAME OF THRONES	A Song of Ice and Fire (Game of Thrones)	Literature

*Mobile games that are based on existing game franchises are excluded from the analysis.
**For Disney, we have only included original Disney IP and not the extended Disney universe (including Marvel and Star Wars).

Five out of the top 10 grossing franchises in 2021 originated from **Japan** and **China**, showing the popularity of IP-based mobile games in these two Eastern markets. What's more, the biggest revenue contributors for two global IPs among the top 10—**Disney** and **Harry Potter**—are Japan and China, respectively (i.e., Disney: Twisted Wonderland and LINE: Disney Tsum Tsum in Japan and Harry Potter: Magic Awakened in China).

Source: Airnow

Marvel is a Globally Popular Powerhouse, So Its IP-Based Mobile Games Are Popular Across the World

In markets where entry barriers are high, localization is crucial

Top 5 Marvel Games by Revenue

Based on 20 Marvel mobile games | 2021

Rank		Game	Launch Year	Developer	Publisher	Genre	Outperforming* Region(s)
1		Marvel Strike Force	2018	FoxNext, Scopely	FoxNext, Scopely	RPG	NAM, W-EU, Oceania (OCN)
2		Marvel Contest of Champions	2014	Kabam	Kabam	Fighting	NAM, LATAM, OCN, W-EU, Central Southern Asia, Sub-Saharan Africa
3		Marvel Future Fight	2015	Netmarble	Netmarble	Fighting	NAM, LATAM, SEA, Central Southern Asia
4		Marvel Future Revolution	2021	Netmarble	Netmarble	RPG	NAM, W-EU, OCN, SEA
5		Marvel Puzzle Quest	2013	Demiurge Studios	D3 Publisher	Puzzle	NAM, W-EU, Sub-Saharan Africa

* The revenue of the game is compared against the total mobile game revenue of the region in 2021, creating a ratio. Then, the difference between the RoW and the region's ratio is taken to understand if a game is relatively over or underperforming in each region.

In both of Marvel's top 2 titles, the core fans enjoy **collecting, upgrading, and playing as their favorite characters**. Marvel's sheer depth, number of characters, and various plotlines allow developers to **regularly update the game with new content to keep players engaged**. Combat/fighting **mechanics also complement the IP**.

Marvel-based mobile games have found success in most regions globally. Naturally, **well-known global franchises are more likely to achieve success on a global scale**. Publishers should have a global mindset when launching such an IP-based game.

However, **in markets with high barriers to entry, such as China and Japan, successful games typically require localization from the ground up**. Although Marvel is one of the biggest international franchises in both markets, mobile players are not used to the Western comic art style. **Market saturation/competition** is another key factor to consider. For instance, in China and Japan, games such as Fate/Grand Order and Onmyoji feature similar mechanics to Marvel Strike Force, but they are typically more tailored to the local market.

Source: Airnow

Fully-Localized Disney Games Achieve Success in Japan Where Competition Is Severe

Finding the right market fit is vital in making a successful IP game

Top 5 Disney Games by Revenue

Based on 31 Disney mobile games | 2021

Please note: For Disney, we have only included original Disney IP and not the extended Disney universe (including Marvel and Star Wars).

Rank	Game	Launch Year	Developer	Publisher	Genre	Outperforming* Region(s)
1	Disney: Twisted Wonderland	2020	f4samurai	Aniplex	Adventure	Japan
2	LINE: Disney Tsum Tsum	2014	LINE	LINE	Puzzle	Japan
3	Disney Emoji Blitz	2016	Jam City	Jam City, Disney	Puzzle	NAM, LATAM, OCN
4	Disney Magic Kingdoms	2016	Gameloft	Gameloft	Simulation	NAM, W-EU, OCN
5	Disney Sorcerer's Arena	2020	Glu Mobile	Glu Mobile	RPG	NAM, LATM, W-EU

* The revenue of the game is compared against the total mobile game revenue of the region in 2021, creating a ratio. Then, the difference between the RoW and the region's ratio is taken to understand if a game is relatively over or underperforming in each region.

While Marvel games hardly hit the Japanese and Chinese market, Disney games are extremely well received by Japanese mobile gamers. In fact, **Japan is by far Disney's largest mobile games market**. With two Disney theme parks near Tokyo, **Disney is one of the most popular global IPs in Japan**. On the monetization front, Japanese gamers are receptive to **gacha mechanics** (paying to receive a random in-game item) which the top two Disney games have both adopted. The Disney IP, featuring a large character universe, is a perfect fit for gacha.

Notably, the top four Disney titles are all **female oriented**. **Market fit** is one of the key success factors of IP games. According to Newzoo's Consumer Insights conducted in May 2021, **76% of female mobile gamers perceive Disney as a (very) positive brand vs. 70% of male players**. Moreover, Disney is often perceived as **family friendly.** Despite being the #5 Disney game (around 7% of Disney's revenue share in 2021), **Disney Sorcerer's Arena,** with its card-based combat mechanics, does not completely fit with core Disney fans. This is due to the violent nature behind the gameplay.

Source: Airnow

Regionally Popular IP Is More Likely to Succeed in Big Mobile Game Markets

Three Kingdoms is one of the most popular franchises in China

Top 5 Romance of the Three Kingdoms Games by Revenue**

Based on 19 Romance of the Three Kingdoms mobile games | 2021

三國演義

Rank		Game	Launch Year	Developer	Publisher	Genre	Outperforming* Region(s)
1		Three Kingdoms Strategy Edition	2019	Lingxi Games	Lingxi Games	Strategy	China, Taiwan, SEA
2		Three Kingdoms Fantasy Land	2020	Lingxi Games	Lingxi Games	Card Battle	China
3		Legends of Three Kingdoms	2011	Yoka Games	Yoka Games	Card Battle	China
4		Junior Three Kingdom 2	2019	Yoozoo Games	Yoozoo Games	RPG	China
5		The Legend of Three Kingdoms	2017	TeamTop Games	Tencent	Strategy	China

* The revenue of the game is compared against the total mobile game revenue of the region in 2021, creating a ratio. Then, the difference between the RoW and the region's ratio is taken to understand if a game is relatively over or underperforming in each region.

** Third-party Android app stores in China & other markets are not included.

More than 70% of revenues from The Romance of The Three Kingdoms franchise came from its top two titles in 2021, both by **Alibaba's Lingxi Games**. The IP itself is a historical literature, allowing for various interpretations and leading to several games featuring different gameplay, mechanics, and narrative styles. Therefore, the IP's core fans have more options to choose from based on their game preferences.

China is by far the largest market by revenue for the Three Kingdoms IP, and that extends beyond mobile. China was the biggest driving force behind Total War: Three Kingdoms' overwhelming success at launch on PC. Looking at the top 10 grossing IP-based mobile game franchises (see P10), **half are regional franchises from China and Japan**, the #1 and the #3 biggest mobile games market in 2021, respectively. **The large market size makes regional IPs more likely to succeed in these markets**.

Moreover, due to shared cultural background, Chinese IP is appealing to mobile gamers in other Asian markets as well. For instance, Three Kingdoms Strategy Edition also overperformed in Taiwan and Southeast Asia in 2021.
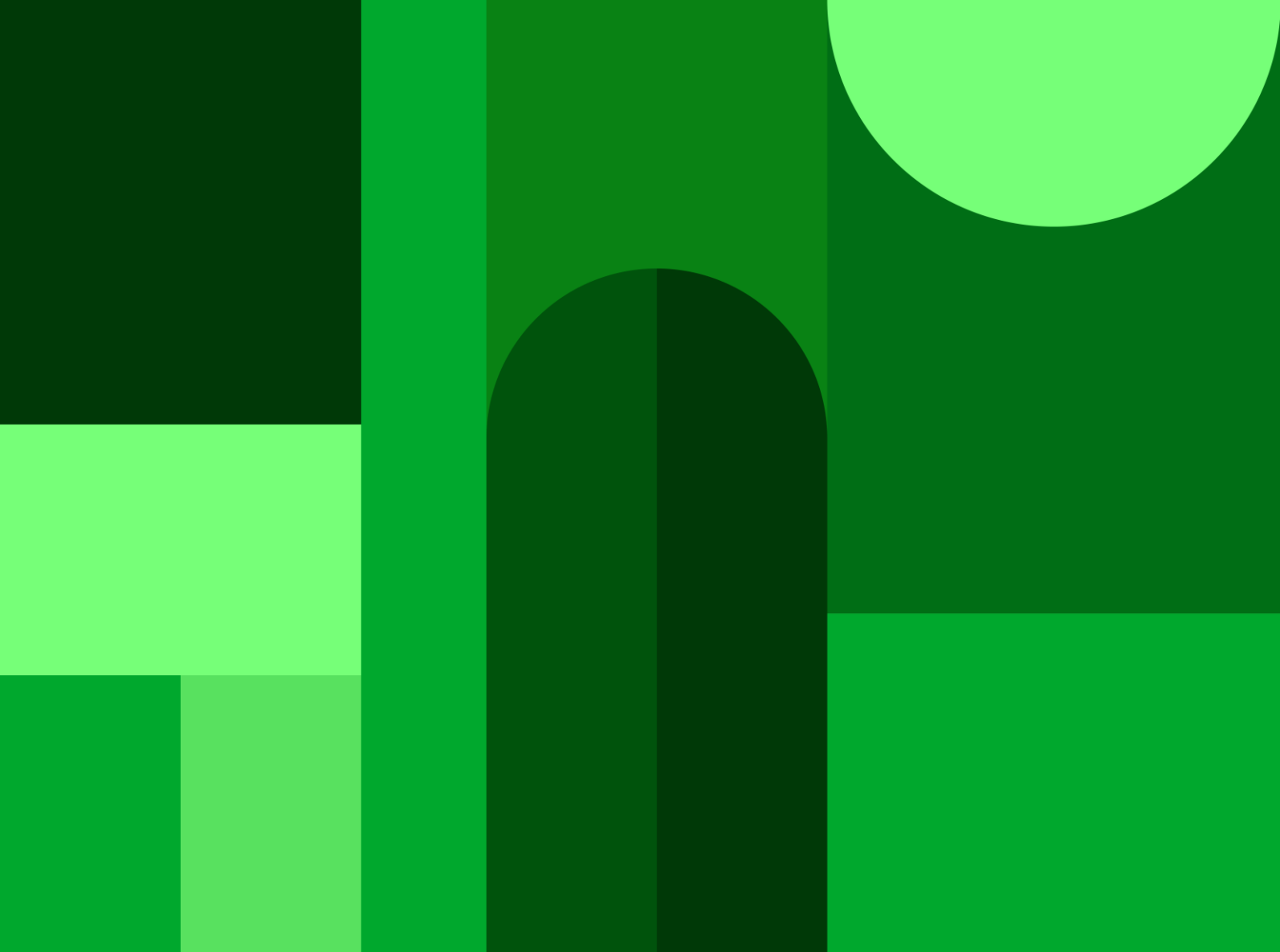
2. Evaluating IP-Based Mobile Games

Case studies of successful IP games

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How Do We Assess IP-Based Games?

Three key criteria to evaluate IP-based mobile games

To achieve high LTVs and long-term community support for any (mobile) games, both **product** (a mix of market & game design fit) and **business** (how to commercialize and operate the game) play an important role. For IP-based games particularly, **market fit** and **game design fit** with the original IP are crucial. Therefore, we focus on market fit, game design fit, and business when assessing an IP-based game.

In this session, we deep-dive into two successful IP-based mobile games—one focused on the Western market and one on the Eastern market—using the three key criteria as defined below. For detailed definition of each criteria, please read 4. Appendix. Newzoo has reached out to all companies mentioned in this session for content approval. If there are any questions, please let us know.

Umamusume:
Pretty Derby

1 Market Fit

- IP scale
- IP relevance for target audience
- Demographic to genre fit
- Market saturation or competition

2 Game Design Fit

- Mechanics fit
- Theme fit
- Tone fit
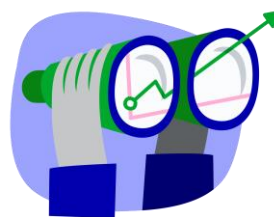
Assessing an IP Game

3 Business

- Monetization
- Launch
- Marketing & distribution
- Market dynamics
- Community management
- Retention / live-ops

Key Findings From Successful IP-Based Games

It is not easy to succeed in mobile games as there are several aspects which need to be "right," but IP helps boost chances

Market

- Franchises **with a large universe** create opportunities for games to feature **a deep game loop**, which leads to high engagement, retention, and monetization chances.

- A **popular IP with little market competition** leaves room for success.

- Understanding the IP's core fans is crucial. IP games are more likely to succeed if **the game genre & game design fit what IP fans like**.

- To successfully launch a game in markets with **high entry barriers** like China and Japan, **localization is required from the ground up**. Simple localization of existing foreign IP games usually doesn't work.
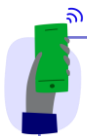
Game Design Fit

- The best kind of IP games fulfill the **"fan fantasy"** of the franchise. Games that do not align with IP values will feel "off" to fans, resulting in lower retention.

- **IP usage should generally be in line with the world that it is created in**. In most IP games, fans are extremely critical to the game's faithfulness to the original IP and the understanding/respect to the IP's lore. Although exceptions happen, it's a lot harder to execute correctly.

Business

- Many successful IP games feature **character-based mechanics** such as character collection & progression, which not only help increase the game depth but also **create more monetization alternatives**. In Japan and China, **gacha** is common and well-received among character-based IP games.

- It is becoming increasingly common for IP holders to develop a **transmedia strategy where (mobile) gaming serves as a key media**. By doing so, IP holders/publishers aim to get fans more devoted to and engaged with the IP. These games often enjoy the right to add original characters to the universe.

- When **games are released in line with movie/other IP launches or special events & festivals**, publishers can expect organic traffic translating to a high number of downloads and engagement.

Marvel Strike Force

Marvel Strike Force Fully Leverages the Marvel Universe via Game Design

Alliance War mode creates bonds among players, just like the Avengers

- **Genre:** Role Playing
- **Sub-Genre(s):** Tactical RPG, Collection RPG
- **Performance Highlight:** #37 grossing game globally in 2021
- **Game Overview:**

  Marvel Strike Force is a role-playing game with turn-based combat gameplay. Players build squads of five **Marvel superheroes and villains**, each of which has unique strengths which synergizes with others. Players battle against other squads (PVE and PVP) to gain resources to level up characters, abilities, and gear to strengthen the squads.

Uniquely designed and animated abilities per character demonstrate the fantasy of the hero in fulfilling ways e.g., Spider-Man & web shot moves.

Character selection and interaction in the game not only match the original story but are also original (the shared universe of heroes and villains).

Key Success Factors

Market Fit

- Marvel movies and comics lay the groundwork for emotional attachment to heroes. Marvel based RPG with turn-based action combat gameplay can have **great appeal to male players**, who are the potential target audience of the game. Our Consumer Insight data shows that **59%** of those who played any Marvel's Avengers games in the past six months were men.

Game Design Fit

- The Marvel universe provides **a huge number of recognizable characters and narrative options. RPG mechanics** maximize the element of player choice of that large character universe. Certain character combinations unlock additional abilities, which adds unique strategy elements and creates incentives to collect more characters.
- **Alliance War** mode (team-based PVP) is close to Marvel's lore. It encourages players to gather (e.g., via social media) to strategically defeat enemies together. This additional meta layer also successfully creates social stickiness and a reason to continue to play and invest.

Business

- **FoxNext** and **Scopely** have conducted multi-channel marketing activities powered by a large budget, including ads on TV and social media, influencer marketing, and **campaigns tied to other Marvel activations** (e.g., Deadpool 2 movie release, Comic-Con).

Deep RPG Mechanics and Different Game Modes Optimize the Ever-Growing Character Pool

The game also added a Strike Force original character to the universe

Over 2,600 characters

Over 180 characters

Market Fit: IP Scale

Marvel Strike Force leverages Marvel's large character universe and even beyond it.

- There are currently **over 2,600* Marvel characters available** from its multi-media franchises such as films and comics. **Marvel Strike Force** makes the best of the large character universe. **The game has over 180 characters** as of June 2022 and its number keeps increasing via updates.

- What makes the game unique is an **addition of an original character**. The game initially focused solely on existing heroes and villains from the Marvel franchises. However, in collaboration with the IP-holder, **Boundless Entertainment** and **Scopely** added **the first all-original character Kestrel (Major Sybil Tan)**, Malaysian heroin, in May 2021.

Game Design Fit: Mechanics

The RPG mechanics of Strike Force fits the identity of characters in Marvel's lore.

- **Each character has unique abilities, traits, and strengths**, the same as in the films and comics. Moreover, **certain character combinations unlock additional boosts.** Enormous combinations of characters, powered by its large character pool, encourages players to constantly pursue the best synergy and make it fun to collect more heroes/villains.

Characters have different "Best With" characters to team up with and have different types of battles they perform the best in.

Different game modes require different squad combinations.

- For example, **Alliance War** consists of defense and attack, **requiring squads with different skillsets** (also depending on opponents) having a variety of characters.

- There are **active alliance communities on Facebook and Discord**. Players gather and discuss strategies and share success and failures, just like the Avengers in Marvel's lore.

Players can utilize their varied characters in a variety of game modes, such as Story, Events, Arena, Blitz, Raids, Alliance War (Raids), Dark Dimension, and Campaigns.

Source: marvel.com*

Marvel Avengers Alliance Paved the Way for the Initial Success of Marvel Strike Force

Shutdown of the Marvel Avengers Alliance games triggered the existing players to look for a similar experience

Publisher: Playdom & Disney Interactive
Developer: Offbeat Creations
Release: March 2012 (Facebook)
Shut down: September 2016

Publisher: Playdom & Disney Interactive
Developer: Offbeat Creations
Release: March 2016 (worldwide)
Shut down: September 2016

Publisher: FoxNext → Scopely
Developer: FoxNext → Scopely
Release: March 2018
Operating as per November 2021

Marvel hero collection RPG was not always the complete recipe for success

Marvel Strike Force (MSF) was the top-grossing game in 2021 among the Marvel-based mobile games. Marvel hero collection RPG seems like a solid recipe for success. However, **MSF was not the first attempt on mobile**.

Marvel Avengers Alliance 2 (MAA2) was a similar hero collection RPG on mobile with combat gameplay and social features (e.g., PVP tournaments and co-op missions). MAA2 was the sequel of the original flash game on Facebook. While the original on Facebook succeeded, MAA2 on mobile was not a remarkable commercial success. One of the reasons for this is the **player base split between MAA2 and the original MAA**. Many of the outdated modules used for the original flash game were ported into MAA2 on mobile. This caused a buggy playing experience and resulted in multiple fans of the original version sticking to the same platform, leading to the player base split.

MAA2's service was eventually shut down in September 2016 (along with the original version), as **Disney** was closing down **Playdom** and shifted to licensing its IPs. **The shutdown provided the player base built since 2012 with an incentive to look for and start playing other games** with similar game mechanics, such as **Star Wars: Galaxy of Heroes** (launched in November 2015) and **Marvel Strike Force**.

Move animations were designed for each character but limited compared to MSF.

Character moves and kill-animations, including fan favorite attack moves for familiar heroes, are uniquely designed.

Umamusume: Pretty Derby

Multi-Platform Development of the Umamusume: Pretty Derby IP Creates Synergy in Several Aspects

Simulation game design increases sense of immersion in the IP universe

- **Genre:** Simulation
- **Sub-Genre(s):** Racing
- **Performance Highlight:** #1 grossing game in Japan in 2021
- **Game Overview:**

  Umamusume: Pretty Derby is **Cygames'** multimedia entertainment franchise. The game is an anime-style simulation/racing game featuring **female characters inspired by legendary Japanese racehorses**. Players can train the characters to compete in races (PvE/PvP), read through stories, and watch victory live shows performed by characters.

Left: Complex mechanics of training characters with varied status/skills, sometimes having characters inherit abilities from others. Tactical decisions around these become the real focus for (advanced) players.

Right: Player choose one tactic out of four for a race, for example, running in the front group or staying last until the final spurt, which adds a layer of tactical aspect.

Key Success Factors

Market Fit

- **Cygames** actively develops the IP across multiple platforms and media. Umamusume: Pretty Derby debuted in manga/anime format a few years before the game's launch to build a fan base that looked forward to the universe being replicated as a game.

Game Design Fit

- **Cygames** developing the original work means that it can faithfully recreate the universe of horse girls aspiring to win a big race and fame. **Character growth simulation as a trainer** and **continuous additions of stories/characters** maximize the potential of the universe.
- The game also offers **original stories that fans can enjoy only in the game** (e.g., main, character-specific, and event stories), which encourages player retention.

Business

- It takes a few hours to complete a loop of training a character, which then becomes playable in other modes. This **in-depth training and synergy system** (characters support each other) **encourages players to collect more (support) characters via gacha** to efficiently train the best ones.
- The game features in-game music and live clips of characters narrated by voice actresses. **Cygames** also holds **physical live music events** with the same voice actresses. This way, it keeps providing fans with opportunities to engage with the IP.

Continuous Additions of Characters, Stories, and Events Expand the IP Universe in the Game

Original content that fans can enjoy only in the game keeps expanding

Market Fit: IP Scale

Anime

Music

Manga

Cygames

Live music events

Cygames develops the universe as multi-platform entertainment.

In its universe, each character **personifies a legendary racehorse, replicating its status, characteristics, and actual stories.** Each is narrated by a voice actress. This high capability of representation also attracts **horse racing fans**. Its originality, in part thanks to **multi-media** development, provides fans with opportunities to engage with the IP beyond playing the game.

Game

Game Design Fit: Mechanics & Theme

Characters are not only playable, but also unlock original stories.

- **Cygames** regularly adds new characters along with **character-exclusive stories**, which can foster a bond with the character. This incentivizes dedicated players to collect their favorite characters by playing and/or spending more on the game.

- Thematic/seasonal story events are held for approximately two weeks almost every month. Each event adds a **themed story**.

- **Cygames** owning and developing the IP makes it possible to keep adding **more original content that fans can enjoy only in the game**.

Character Status

Character Story

Left: 72 playable characters are available as of November 9, 2021, and each one has a different status and potential for growth.

Right: Players can read through character exclusive stories. Unlocking episodes requires obtaining the character and/or training the character.
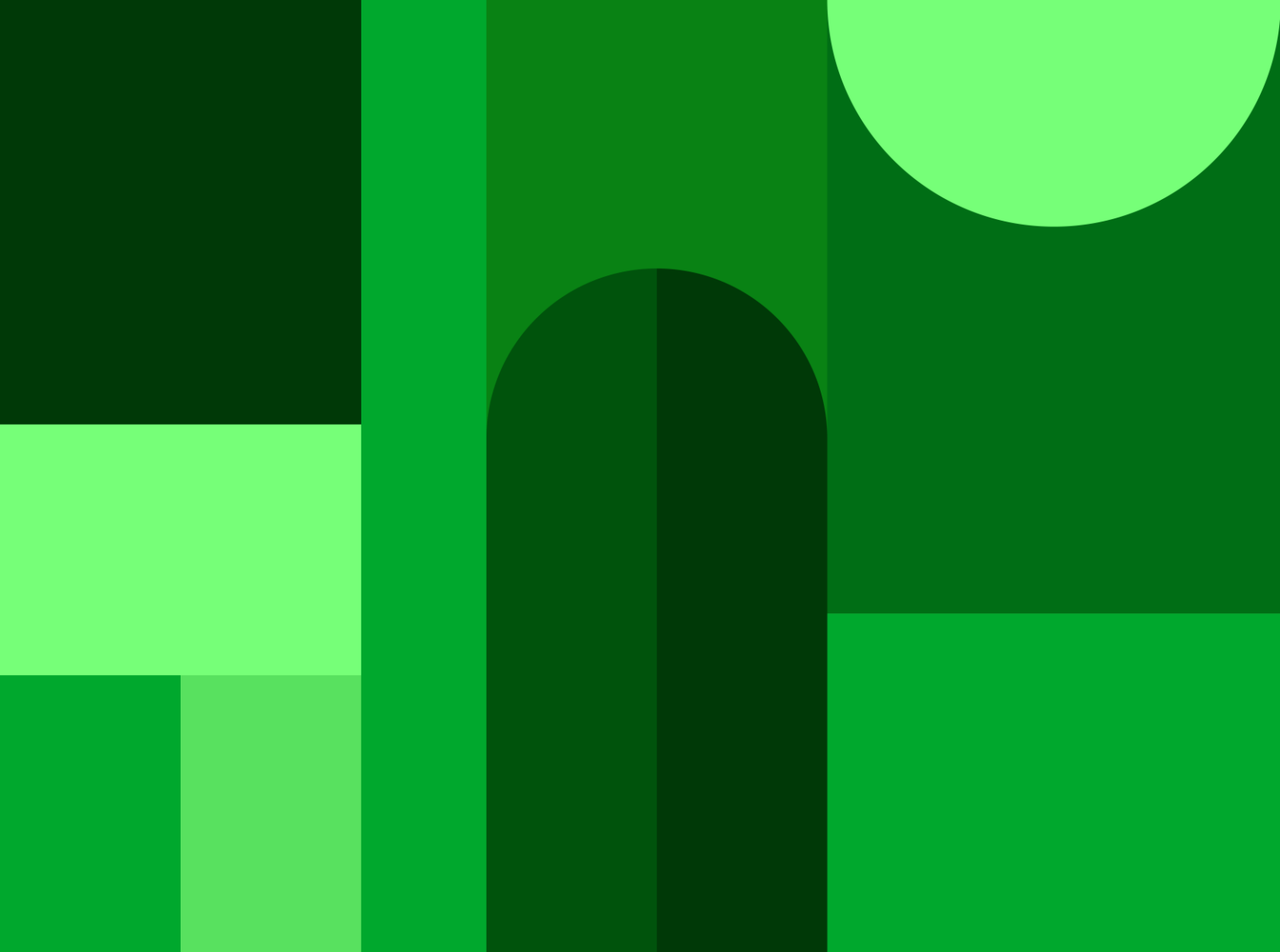
3. Stakeholder Spotlights

Tilting Point is a leading free-to-play publisher that powers up existing live games using deep marketing and product expertise, cutting-edge technology, and a user acquisition war chest. Recognized as one of the top mobile game makers in the world by PocketGamer.biz in 2021, Tilting Point was founded in 2012, and has grown to a staff of over 400 people with offices in Barcelona, Boston, Kyiv, New York & Seoul. Tilting Point's most successful games include SpongeBob: Krusty Cook-Off, Star Trek Timelines, and Warhammer: Chaos & Conquest.

Tilting Point

Karolina Cooper
Senior Growth Director

Tilting Point has published several IP-based games on mobile. What do you think the major benefits of IP-based games are? Do you see any positive effects on UA, retention, and/or monetization?

The major benefit is the non-organic and organic acquisition the brand enables. On the organic side, strong IP brings an already established brand following the game with people downloading based on their affinity with the brand. Branded games might also receive stronger featuring due to their awareness, and popular branded keywords will increase search traffic. Some fans of the brand can act as "free" influencers promoting the game in various community pages. All this is a lot harder to achieve with an unknown game name.

On the UA side, the brand can lower CPI and increase CTR of UA ads, overall allowing the UA team to scale the spend. The creative execution is very important: how appealing the ads are to the target audience, keeping in mind that they

also need to pass licensor approvals.

The brand can also have a positive impact on retention and monetization, but how it's implemented into the game's progression, level design, and monetization will ultimately show to what extent it has an impact on game metrics. The execution needs to be aligned with the brand's core values and audience expectations.

Based on your experience, what are the key drivers that make an IP-based game successful? Have you seen any differences between the Western and Eastern markets?

The most important factor is the right IP and game match. If the IP doesn't fit with the game and genre, we won't reach the right target groups. That's why audience research and testing early on are very important to gather the necessary data. Games appealing to Western and Eastern audiences can be very different, but it's possible to bring limited-time

integrations that appeal to different groups in different countries. For example, in Astrokings, we successfully brought Legends of the Galactic Heroes to the Eastern audience and Stargate to the Western Audience, generating over 1,000% install peak and 400% revenue increase.

Other key success drivers are marketing and execution quality, both mentioned above. The brand needs to be well represented on marketing collateral and A/B tested to use top-performing creatives on the store. User journey needs to be smooth and continuous, from what they see on the marketing collateral, to the store experience and FTUE when they launch the game.

When working with developers and IP holders, how do you ensure that the collaboration is efficient and effective between different parties? What are the biggest challenges?

The three-way collaboration between the publisher, licensor, and developer certainly requires strong project management and communication skills. It is important to have one person in charge who manages the relationship on both sides and can bring people together to discuss plans and find solutions. Having a different point of contact for different stakeholder groups can quickly generate communication challenges.

Strong project management capability (follow up on action items, thorough meeting notes) helps keep the project on track and ensures everyone is on the same page and aligned on plans. But even then, delays can happen on either the development side or the licensor side. For example, an asset might require three revisions and take two weeks longer than expected to approve. That's why building a buffer into the plan when working with licensed games is always a good idea.

In terms of publishing and launching strategy, what do you think the key differences between an IP-based and a non-IP-based game are?

IP-based games can generate a much bigger following right from the get-go. If the brand is large, popular, and viral, developers can expect a lot of organic traffic, which also helps with UA scaling. For example, we had 17 million pre-registrations for SpongeBob: Krusty Cook Off, which generated a huge organic install spike when the game launched.

Another opportunity to leverage the power of the brand is to piggyback off any interesting activations the licensor is planning, and leverage its web, social, and even above-the-line TV channels to promote the game.

In terms of non-IP games, if the developer has multiple games in the portfolio, cross-promoting the game to the existing network (in-game and community) can bring a lot of users in organically. ASO strategy is important: selecting the right keywords, especially in the game name, and creating assets that stand out from the competition. Non-branded games also tend to rely more heavily on paid UA channels.

What trends do you see in IP-based (mobile) games in the coming years?

Developers will be bringing more brand cross-overs inside existing games to give games an organic and non-organic boost as well as engage existing users. Doing a limited-time integration is faster, and also allows bringing multiple brands into one game.

More and more traditionally non-gaming brands see opportunity in gaming, which you can see in integrations with brands such as Gucci and Adidas. They want to reach their target audiences where they spend most time: on their mobile devices!

The cost of having a AAA brand integrated inside a game will most likely increase over time, as the demand increases to put brands in more games and stand out from competition in a busy, overcrowded mobile market.

Any advice to developers/publishers who are interested in adapting entertainment IP to mobile games?

A few words of advice:
- Make sure the brand is the right fit for your game and your game target audience has strong affinity for the brand.
- If your entire game is based on a brand, it needs to be a strong A-tier brand with significant following. Having a brand that is too niche might have the opposite effect and limit the reach.
- When developing a branded game, it's always good to think about the player experience of someone who is a huge fan of the brand, aware of the brand, and doesn't know the brand. Can the second and third group still enjoy the game?
- Brands can be very beneficial to a game's growth but you also need to be prepared to have less independence on how you want to shape certain aspects of the game as the licensor will provide feedback on how the brand is integrated.
- Prepare for longer lead-times. Working with IPs can be very beneficial, but licensors often have strict guidelines on how they want their brand represented, so approvals can take time and sometimes multiple turnarounds are needed to get the implementation or specific assets fully approved.

Bandai Namco Entertainment
Koji Tezuka

Bandai Namco Entertainment (BNE) delivers various products and services catering to a worldwide audience in areas such as network content, home video game software, and life entertainment based on its IP (Intellectual Property) Axis. BNE gives shape to "a new type of fun" with amazing ideas and newer technology unavailable elsewhere. Furthermore, BNE makes ordinary everyday life more enjoyable and aims to realize "more fun for everyone" that allows customers throughout the world to keep smiling.

Bandai Namco Entertainment
Koji Tezuka
Executive Officer

BANDAI NAMCO

BNE has produced several games based on anime and manga IP. How do you select suitable IP for mobile game adaptations? How do you craft games that complement the IP? How do you plan the product launch?

When considering which IP to make into a game, we start by analyzing how many customers accept the characters and the worldview, what emotions they experience through the IP, and where they feel emotion and empathy. For established IP in particular, we take a panoramic viewpoint of the IP and its experiences. This means we consider not only games in the franchise but also movies, TV series, live performances, and toys from the IP's past, present, and even future. We only adapt IP into games if we are confident that the game will positively impact fan experiences with the whole IP. Elements that make a certain franchise successful differ greatly between different IP. These elements include the number of unique characters, character development and relationships, depth of the story, pacing, and a sense of urgency. Therefore, for each IP,

we select a game system that can express these elements continuously throughout the service period of the mobile game and incorporate them into the UI/UX. Further in the process, we conduct thorough quantitative user surveys, closed beta tests, and in-depth quality-assurance testing to ensure there is no gap between the game experience and the experience fans expect from the IP. As a result, if certain criteria are not met, we make it a rule not to proceed with any further game development.

BNE has produced several hit games, such as Dragon Ball Z Dokkan Battle and ONE PIECE Treasure Cruise. Based on the experience, what do you think the keys for IP-based mobile games to succeed are?

We always strive to make our IP games a must-play for fans of an IP. We understand that PC and console games, movies, anime, and manga often provide a different experience to mobile games. Therefore, our smartphone game adaptations do not aim to replace these

experiences. We aim to create game concepts that are unmissable for fans of the IP. Mobile games present many unique opportunities to achieve this; for example, mobile is a great format for continuous play in short periods, quickly updating operations, connecting many users, crossing them with the aforementioned IP-specific experienced values that IP fans are looking for and defining new experiences for fans.

For example, we designed "Dragon Ball Z Dokkan Battle" with a focus on how quickly players can experience the "Dokkan feeling" (i.e., the explosive and exhilarating sense of destruction) that only Dragon Ball can provide. We're trying to figure out how quickly players can experience this from the start of every game.

What do you think the advantages of IP-based mobile games are? Do you see any positive effects in terms of user acquisition, retention, and monetization?

User acquisition is naturally higher for IP-based games, as they already have built-in fanbases and recognizability. Furthermore, many users are already familiar with an IP's storyline and characters before playing the game, so users need less explanation about these elements. This allows us to focus more on tutorializing the game's systems, making it easier to prevent initial player churn. As a result, it is easier to acquire and retain users via IP-based games.

Additionally, we feel that it is easy to provide a variety of information of interest to the fans more frequently because there are many fans who enjoy the development of the entire IP, including the game, and we also feel that the user community is active.

Do you see any differences between the Western and Asian markets in terms of, for example, selecting suitable IP, designing games, user acquisition and retention, and monetization? How do you deal with the differences?

Since the popularity of an IP varies greatly from country to country depending on that market's preferences and the IP's presence in a given market, we carefully select the regions where we launch IP-based games. Furthermore, expectations and popular character types can differ significantly from region to region, even within the same IP. Battle mechanics tend to be more important for players in North America, whereas character development tends to be a significant part of the experience for our players in Asia. Even within Asia, the preferred game systems are different for Japan, South Korea, and China. Depending on a game's main launch region, we try to optimize the main elements of a game's design and frequency of in-game events. We create games while directly observing the trends of our customers around the world through user surveys and data analysis conducted in various countries worldwide.

Bandai Namco Entertainment

Koji Tezuka

What are the main challenges of developing and publishing IP-based mobile games?

As third-party IP were made by creators outside of our company, it is essential for us to get approvals on the game development process to ensure there are no discrepancies between the original creator's vision and the ideas expressed in the game. Consistency and quality within the IP are more important and should be more prioritized than the individual IP game, as cross-medium inconsistencies in quality and style might give some fans a negative experience. Game developers must therefore have a deep understanding of the world depicted by an IP. For a work that has been around for a long time, we must have a proper grasp of the whole story. Therefore, we spend a lot of time on the research and confirmation process to ensure that the game based on the IP does not end up having an unsuitable setting. There are also many cases where characters have different names in different countries and territories. Different cultures also have different ways of expressing themselves and conversing, so proper translation is vital. We continue to make localization efforts to ensure the content matches the expectations of players in each market.

Bandai Namco group, with The IP Axis Strategy, operates the whole business process from the production of animation, film, and music to the IP's game adaptation.

What benefits do you see in creating and developing IP as transmedia entertainment beyond games? Having both the IP production unit and the entertainment unit, how are you planning to create synergy between both business units in the future?

Implementing the "The IP Axis Strategy", rather than putting focus on individual business, allows us to holistically oversee the IP trends and fan trends to boost the excitement of the IP at the right time—all while offering products with different value propositions. This is, of course, a significant advantage for us. In addition to this, we can increase the number of contact points with IP fans—a key audience for our business—throughout the entire IP experience. As this experience is made up of various products and promotions, we can strengthen the connection. The starting point of our product development is a deep understanding of the IP source material and fans of the franchise. This is where we put most of our focus. In addition, in the future, we would like to provide IP fans with new entertainment products that merge the physical world and the digital world by combining the business know-how and value chains that have been cultivated by every group company.

GREE Entertainment

With the mission of "Lighting up hearts around the world with Japanese IPs and games", **GREE Entertainment** has two core businesses: an IP production business that mainly engages in game development with IP in which the company has been involved in the production of anime and the original works, and a games business that develops games for global launch, both as publisher and as developer.

GREE Entertainment

Sanku Shino
CEO

How do you make decisions when it comes to selecting suitable IPs for mobile game adaptations, designing games fitting the IPs, and planning launch strategies?

From IP selection to the development and launch of a game, we consistently focus on creating an IP experience that can only be provided in the games we develop. In terms of IP selection, based on the knowledge GREE Group company has gained over the past decade working with anime IPs, we have established IP selection criteria that consist of multiple indicators. We believe that our IP selection criteria are unique in that they not only evaluate the anime work but also include the evaluation axis centered around the question of "whether we can provide an IP experience that is unique to our game". Further, we do not necessarily consider the pursuit of originality in game design as the most important point during the development stage. Rather than pursuing highly original game design, we believe that the most important

thing for us is to be able to provide an IP experience that is possible only with our games. Examples of such experiences include world premiere scenarios and video content that can only be experienced in the games we develop, as well as exclusive new developments of an IP itself. To realize these strongly IP fan-oriented initiatives, we have been building close relationships with various IP holders, such as publishers, original authors, and anime production companies, mainly in Japan.

What do you think are the advantages of IP-based mobile games? Do you see any positive effects in terms of user acquisition, retention, and/or monetization?

Based on the premise that IP-based games respect their fans and are able to meet their expectations, we can expect that an IP-based game will have a positive impact in multiple aspects, including user acquisition, retention, and average customer spend. The enthusiasm of IP fans is generally high, and we can sense

their expectations for a game from the comments they send us. In terms of user acquisition, the CPI during the release period is relatively low, and we can build up an initial customer base by conducting a solid promotion campaign. In addition, since customers tend to interact with a game through their interest and love for the IP, they react well to the products sold in the game. Further, by running campaigns in conjunction with events outside a game, such as anime distribution and merchandising, we can activate customers and contribute to the long-term operation of the games.

What do you think are the main challenges of developing and publishing IP-based mobile games?

It's a very big challenge for us to continuously exceed the expectations of IP fans with our games. We receive advice from the copyright holders on how to express the IP in a game. However, we find it quite difficult to keep creating experiences in the gameplay that IP fans cannot have in the original work or anime. For example, if battles are the main attraction of an underlying IP, then battle elements would be incorporated into the game. However, if the battle system, setting, and direction are wrong, the game would be regarded as a degraded version of the original work or anime, leading to users leaving the game. It would not be an exaggeration to say that the lifetime of a game is determined by whether it can maximize the appeal of the underlying IP.

In the coming years, how do you see trends of IP-based mobile games changing?

Today, Japanese anime is watched around the world more than ever. It has grown from "content created in a distant island nation" to "niche content with fans all over the world" and is still in the process of growing. Currently, mainly game companies located in East Asia are creating games based on anime IPs, but we believe that in the future, games that meet the tastes and preferences of local fans will be developed and distributed in other regions as well. We believe that the next few years will be the most suitable time to link the games business with these global phenomena.

What benefits do you see in creating and developing IP as transmedia entertainment beyond games? How are you planning to create synergy between the IP production business and the games business?

Our company has a mission of "*Lighting up hearts around the world with Japanese IPs and games*". In terms of the number of original IP works created, Japan stands out as a country that produces an outstanding number of them globally. Therefore, we believe that the richness of Japan as an IP-producing country will give us an overwhelming advantage in developing the games business out of Japan to the world. We have built a good relationship not only with our partner companies who hold IP rights, but also with the writers and artists who create the IPs.

This direct and constructive relationship with our partners who create the IPs is one of our strengths in realizing our strongly IP fan-oriented initiatives. As for the synergy between the IP production business and the games business, our goal—both simple and powerful—is to be a success story for creating our own IPs and turning them into games in-house.

What's Next for IP-Based Mobile Games?
Looking ahead

Players are excited to see their favorite franchises coming to mobile, and developers are increasingly leveraging established IPs to generate organic traffic.

It is clear that **IP can act as a powerful UA tool** for mobile games. However, **the value of IP has not fully translated to high retention and monetization** yet. For that, developers need to focus on the right fit: the franchise must fit the market the game is aimed for, and game design must fulfill the "fan fantasy" of the franchise. **Understanding the IP's core fans is vital to developing games that they enjoy**. Games that do not align with IP values usually feel off to fans, resulting in lower retention and monetization. Simply put, IP usage should be in line with the world that it is created in.

On the business front, more and more IP holders are developing a **transmedia strategy** to launch their franchise across various entertainment platforms where (mobile) gaming plays a key role. As seen in the case of Marvel Strike Force in the West and Umamusume: Pretty Derby in the East, IP-holders are willing to give developers the freedom to add game-origin characters to the IP universe. This freedom engages fans with the game and keeps them attached.

At the same time, as we concluded in our Global Games Market Report, the universe for game-origin IP is also expanding into movies and TV series. **The entertainment industry is embracing gaming to unprecedented levels.** At its launch, League of Legends-based series Arcane reached the top spot on Netflix in 38 countries. In turn, Netflix added a games library to its subscription service, two of which are based on one of their most-prized series Stranger Things. In the future, entertainment platforms will continue to integrate (mobile) games into their strategy.

With how the market is shaping up, entertainment IP holders can't afford to miss mobile games as part of their launch strategy—but doing so with the right market and design fit is crucial.

Tianyi Gu
Market Lead – Mobile
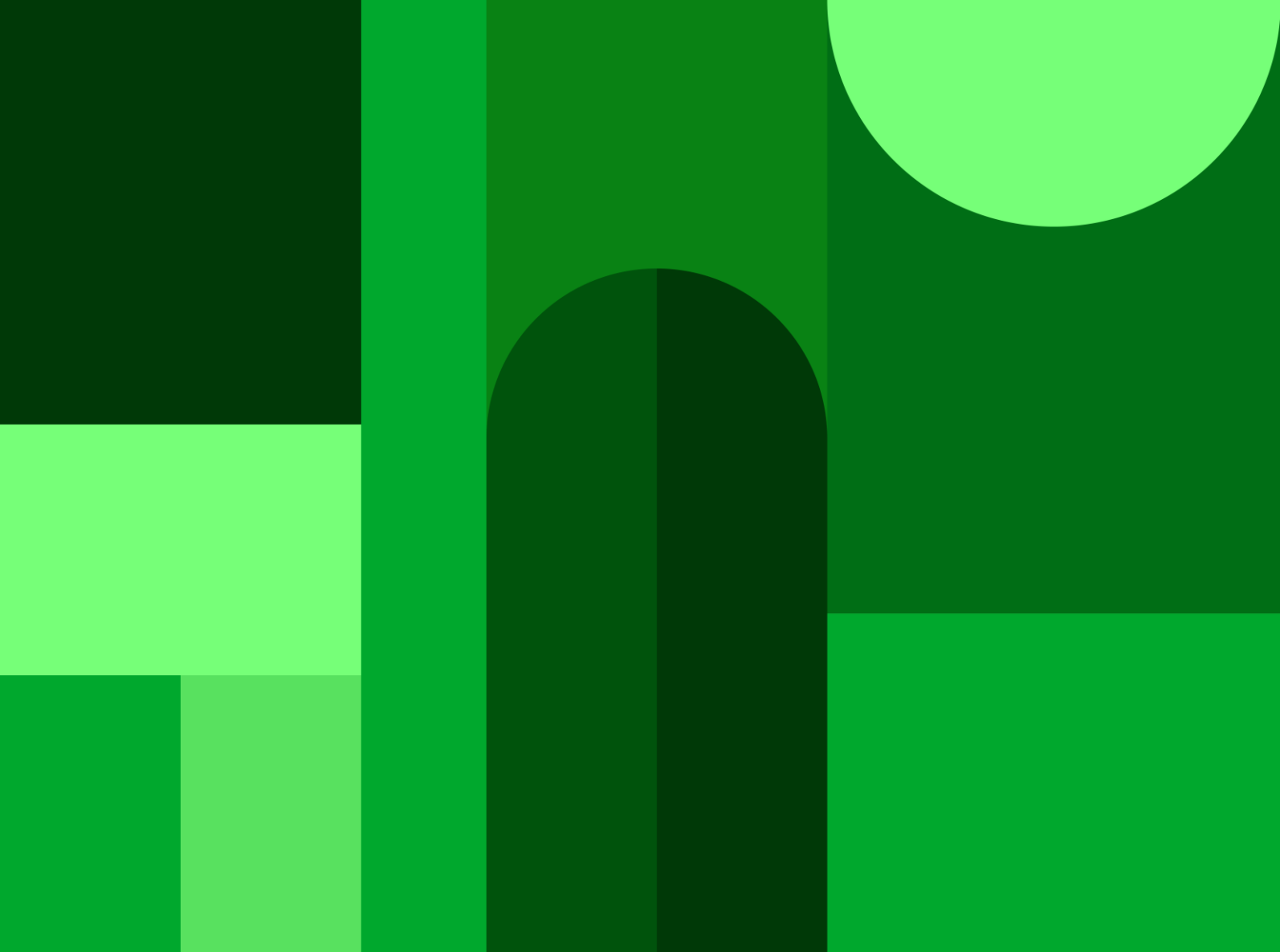
4. Appendix

Market fit, game design fit, and business for IP-based games

newzoo

Assessing IP Fit With Games

Scoring both market potential and game design viability

Market Fit

Demographic to Genre Fit

The IP demographic profile should share a strong match with the game genre players. An IP with good genre fit can enhance players' experience.

IP Scale

The IP should be well-known to the target audience, creating interest based on viewership, sales, and social media data.

IP Relevance for Target Audience

The IP needs to be relevant enough to drive people to engage more deeply through a game format.

Platform Saturation or Competition

There is a high demand on the market if the IP does not have any related game existing or to be released in the future.

Game Design Fit

Mechanics Fit

Mechanics relate to the core action that players will engage with in the game. These are essentially the rules and parameters set up to make the game fun. Some well-known IP interactions or stories need to be translated well as core gameplay or other narrative elements to guide IP fans to the game.

Theme Fit

The theme gives the game context and sets expectations for the mechanics and progression. The game needs to build up a combination of surroundings, atmosphere, world, and other setups around the IP to further provide an immersive experience for IP fans.

Tone Fit

The tone relates to the narrative and unique sequence of events that take place during a session. There should be a match between how the player experiences the consecutive actions and how it is delivered. The audience should feel that the game is matched to the IP through music, vocal, art style, and other flagship adaption sets.

Assessing Business Fit With Games
Scoring the commercial strategy

Business

Launch

An effective launch will build the right level of momentum and hype. The anticipation of a game can go a long way, and successful games are more frequently enabling their community through authentic content and being present on the right channels well before launch. Continuous support and communication with the community post launch drives a vibrant and growing player-base.

Market Dynamics

Filling a niche or gap in the games market is one reason why some games find success. Different themes, art styles, genre evolutions that target different demographics but use well-tested concepts can recreate similar or better success.

Marketing & Distribution

Good marketing forms the basis of growth, and the best games can get marketing for free through viral growth and word of mouth. Great examples are games that understand where their audience is, what content resonates, and how to create culturally relevant campaigns that aren't out of place. Understanding what is possible on all distribution platforms (discounts, promotions) and partnerships (bundles, branding) with other organizations can take the game to the next level.

Monetization

Arguably the most important factor for a game's ultimate success is how it monetizes. The decision of whether to be premium or free-to-play alone is very impactful. Hit games will understand what model works and will deeply understand pricing. Doing this without missing or antagonizing audiences ensures long-term success. Being deliberate with each segment of the audience and knowing the value they will derive will shape the overall game and required internal capabilities.

Community Management

The community around games has become a central pillar of many hits. Related to marketing, being present on relevant social media channels, forums, lifestyle content, and creating a strong sense of feedback will create a life for a game outside the game itself. Enabling evangelists, creating a community nexus on Discord, encouraging discussions, and building in public are all tools to drive community enthusiasm.

Retention / Live-ops

Successful games will aim to improve retention over its lifetime. It's not uncommon for new players to join for one reason (e.g., exploring the world) but stay for aspects that are entirely different (e.g., socializing). The best games will dedicate resources to not only fine tuning the product to improve retention at every part of a player's journey but will also provide events, media, competitions, and prizes. Esports is a great example.

The games data specialists

Newzoo is the only specialized games and gamer data company. We provide the full overview of what, how, and why people engage with video games.

The Newzoo Platform boasts an array of best-in-class games tracking data, consumer research, global market sizing insights, and trends that give an unparalleled view of the games industry and audience.

Newzoo: The Games Data Specialists

Newzoo Platform

The go-to destination for accurate and actionable metrics, including game-level MAU for all platforms. Also includes our global reports data.

Consumer Insights

The best way to understand consumer engagement and profile your target group, including our gamer segmentation.
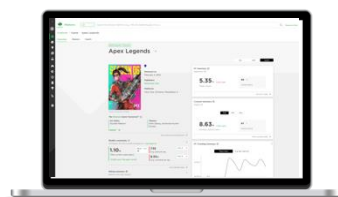
Consulting

Custom projects that put our experience and expertise to work on strategic and financial challenges.

Global Games Market Report

Newzoo Platform

Every report subscription includes access to our easy-to-use platform so you can slide and dice the data in multiple ways.

Question?

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