

GameRefinery
A Liff Company

Innovative Monetization Features Snapshot Report

June 2022



GameRefinery uses a three-layered approach to categorize games

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



GameRefinery's Genre Taxonomy

Innovative monetization features overview



Kalle Heikkinen
Senior Game Analyst

There are several strategies that game developers can follow to monetize their mobile games, and hundreds of different monetization methods. As the mobile game industry continues to innovate with new genres and playing styles, new monetization methods are emerging too. But which monetization methods are the most effective? And perhaps more importantly, which monetization methods are the best fit for your game?

Our latest report provides valuable insights into innovative monetization features, covering the ever-evolving Battle Pass to new types of gachas and the latest developments in IAP offers. Using the GameRefinery service, we reveal which monetization features are proving a hit with players and why, as well as how they're being utilized with best-use examples from games in the mobile market.

Whether you're interested in adding more monetization features to your mobile game or looking for inspiration on how to expand existing features, you're in the right place.



Key points



Kalle Heikkinen
Senior Game Analyst



- Battle Passes are one of the most popular monetization methods in F2P titles, featuring in around 60% of the top 20% grossing mobile games. This monetization method continues to evolve, most recently with auto-new subscriptions, social elements and piggy bank systems.
- One of the reasons Battle Passes are so successful is they can integrate with a variety of genres without affecting the core gameplay experience. They're also a proven way of increasing retention and can support wider monetization strategies.
- In-game shops with gacha mechanics are even more popular than Battle Passes, especially in Japan where they feature in 93% of the top 20% grossing titles!
- New gacha mechanics are emerging all of the time, with the latest innovations featuring on greater levels of transparency (milestone and pity gachas) and cooperation with other players, such as joint-pull gachas.
- IAP offers are one of the most established monetization feature and can be utilized via core gameplay or meta layers, which help players progress through hybrid gameplay elements outside of the core gameplay experience.
- When used correctly, IAP offers can appeal to a large variety of player motivations. Most recently, combining progressive rewards with IAP offers, meaning players are rewarded after reaching a certain level of spend, is a trending feature.

Battle Pass

How has the heavily trending engagement/monetization feature evolved these past few years?



What is Battle Pass?



Kalle Heikkinen
Senior Game Analyst

The significant thing about the Battle Pass feature is that it has "many faces." First and foremost, it can be seen as an engagement/progression feature. It gives players another progression layer and engages players for the duration of the game's season. One of the main reasons it especially suits games with cosmetic economies is that there is often no power progression and minimal progression layers between matches outside Battle Pass. You get the feeling of constant progression, which is a strong motivational driver.

Secondly, of course, it is a monetization feature. Often, Battle Passes offer exceptionally good value with a relatively low price point as you have to "work for your rewards" to unlock them compared, for example, to a direct IAP bundle. It is often targeted to be a highly converting feature for low spenders/non-payers, and is also more appealing psychologically for many players; you can see the rewards you've already "halfway unlocked," which induces much stronger FOMO than missing a limited-time IAP bundle sale.

The idea behind a Battle Pass plan

Complete tasks or levels



Get points



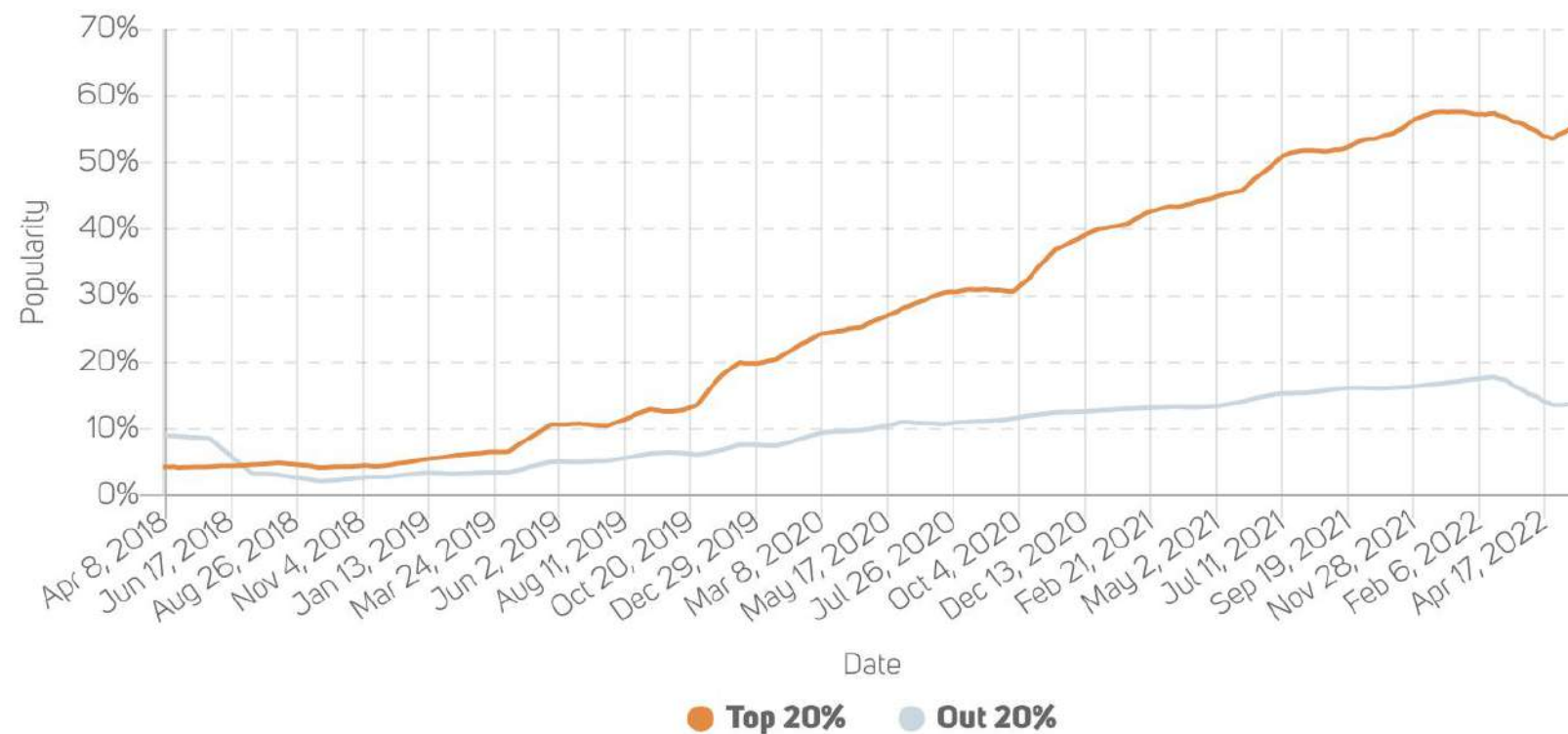
Unlock rewards

New rewards and progression next season

Battle passes can be seen as one of the core elements for a successful free-to-play title

Source: GameRefinery SaaS platform

The popularity of Battle Pass plan feature



The popularity of Battle Pass in the top games really started growing back in the summer of 2019. Now, around 60% of the US (iOS) top 20% grossing mobile games utilize the Battle Pass feature, while only 14% of games outside the top 20% have it.



Kalle Heikkinen
Senior Game Analyst

Battle passes have grown more popular since they started trending heavily in 2019, as different genres outside of first-person shooters with cosmetic monetization started implementing them. The feature has quickly become one of the most differentiating features when comparing the top-grossing games to other mobile titles and can be almost seen as one of the core elements for a successful free-to-play title.

As we can see from the graph, around 60% of the US top 20% grossing games utilize the Battle Pass feature. One of the reasons battle passes are so popular is that they can be introduced into almost any genre, whether the game's monetization relies on a cosmetic economy (*competitive shooters, MOBAs*), power progression (*RPGs, Strategy*), or consumable boosters (*casual puzzlers*).

Battle Pass is utilized across all subgenres



Battle Pass can work in any genre, as proven by our data on the GameRefinery service. Here you can see a list of the western top-grossing 200 games by subgenre that have Battle Pass implemented.

If you are interested in seeing how Battle Pass is implemented in your game's genre, or you're seeking inspiration from other genres, you can explore Battle Pass implementations by genre with our [Implementation Examples tool](#) in the GameRefinery service.

4X Strategy	19	Board Games	1
Match3 Puzzle	13	Realistic Sports	1
Slots	12	Customization	1
Turn-based RPG	5	Idle RPG	1
Tycoon/Crafting	5	Word	1
Multiplayer Battle Arena	4	Sovereign Games	1
Arcade Sports	3	Adventures	1
Battle Royale	3	Bingo	1
Fighting	2	Bubble Shooter	1
Classic FPS/TPS	2	Other Puzzle	1
Merge Games	2	Arcade Driving	1
Tactical Battler	2	Idler	1
Action RPG	2	Breeding	1
Puzzle RPG	2	Hidden Objects	1
Tactical Shooter	2	Solitaire / Mahjong Solitaire	1
Time Management	2	Poker/Cards	1
Build & Battle	1		

Source: GameRefinery SaaS platform

Why does the **Battle Pass** resonate so well with players?



1. It doesn't necessarily affect the core game

- As the Battle Pass is merely a way of rewarding players' progress, it can be implemented without having to tinker with the core game experience.
- This means that there's no significant risk of causing balance issues OR altering how players experience the actual game itself.

2. It increases retention and sense of accomplishment

- Engages players, as rewards are given for playing and achieving milestones, not just passively purchasing a bundle of boosts.
- Limited time to acquire rewards incentivizes players to come back more often so they don't miss any goodies.
- Especially suited for casual games, which typically lack long-term progressive goals and accomplishments.

3. It adds direct and indirect boost to monetization

- Direct monetization through a premium pass resembles a subscription, as it needs to be renewed each season.
- Indirect monetization through increased engagement and playtime, which exposes users to the traditional monetization sinks (e.g., more lives, extra moves, boosters in Match3 games.)

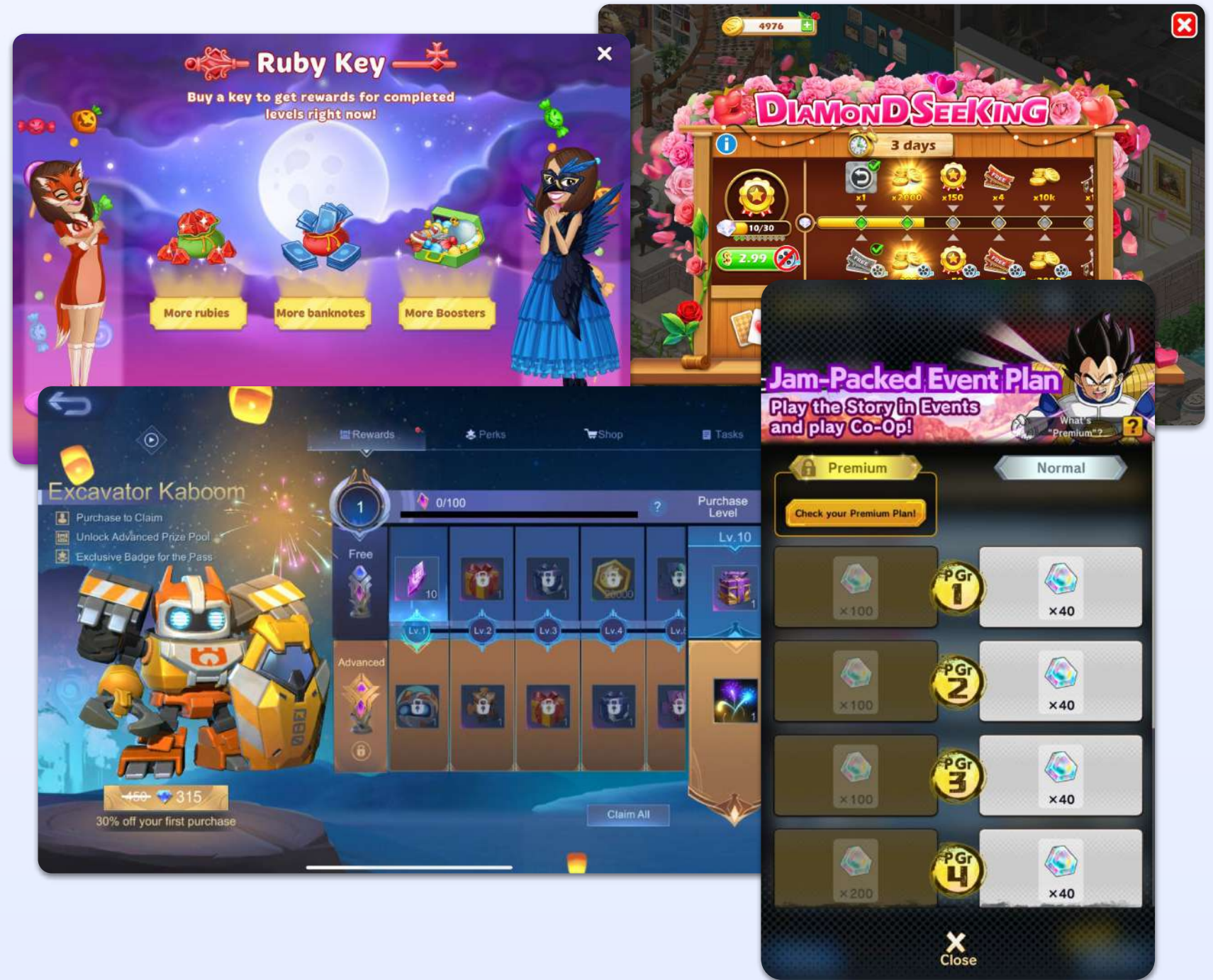
How to take your **Battle Pass** to the next level



Kalle Heikkinen
Senior Game Analyst

There's also a growing number of games that have started innovating outside of the usual battle pass formula by tweaking various mechanics or giving it an innovative twist. When developers get this right, not only can it help their game stand out, but it can cause a major increase in the number of daily players and the amount of revenue that the game generates.

To find out how developers are innovating outside of the basic battle pass format, let's take a look at some of the best examples from top-performing games.



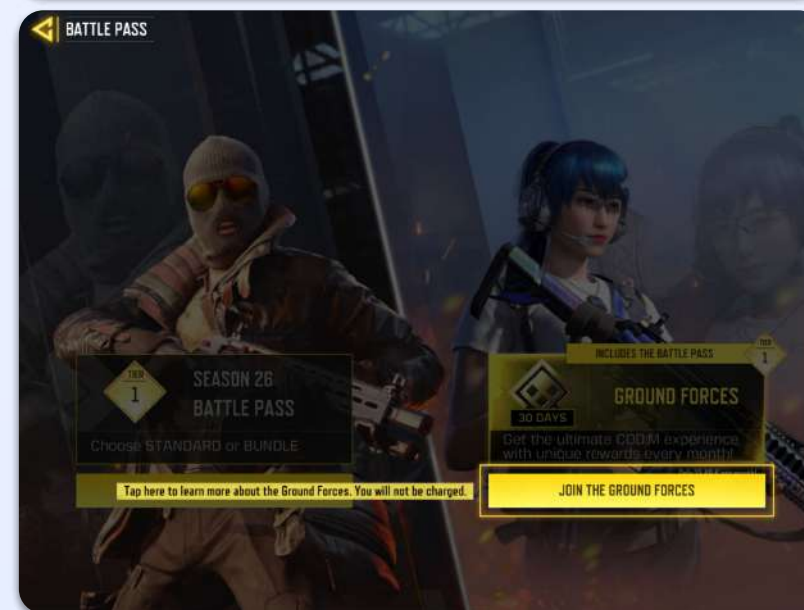
Examples of various innovative Battle Pass implementations



Auto-renew Subscription Battle Passes - Call of Duty®: Mobile

COD: Mobile launched a subscription option for Battle Pass purchases a while ago. Players can subscribe for monthly benefits, including the Battle Pass premium layer, permanently.

Recently, subscription-based benefits have become more common in battle passes, but the auto-renew is a more unique approach as only a few games, such as Zooba, use this alongside COD: Mobile. The auto-renewing subscription is a clever way to incentivize players to keep purchasing the premium reward tracks of battle passes more frequently, especially by offering great additional perks for it.



Source: GameRefinery SaaS platform

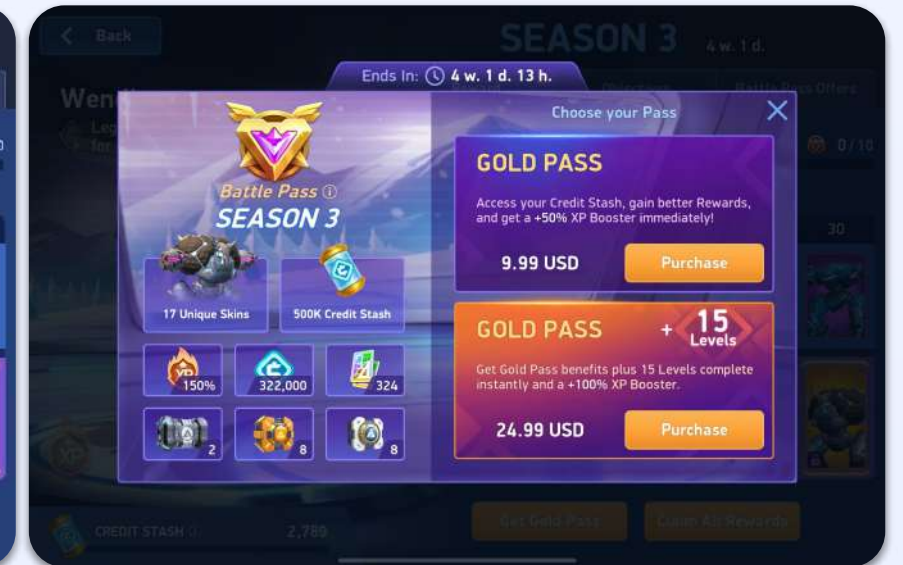
Examples of various innovative Battle Pass implementations



Battle Passes combined with a piggy bank system - Mech Arena

What makes Mech Arena's BP implementation unique is that a piggy bank system is used as an additional incentive for purchasing the battle pass.

Purchasing the Gold Pass lets players open a piggy bank titled Seasonal Credit Stash at the end of the Battle Pass season. The Seasonal Credit Stash is filled by the player completing matches during the season, becoming a more and more valuable bonus on top of the premium track as the season goes on.



Source: GameRefinery SaaS platform

Examples of various innovative **Battle Pass** implementations



Gifts for teammates - Royal Match

Royal Match offers a quite basic implementation of the Battle Pass, but something not often seen is the "social incentive" to purchase the premium version of the Battle Pass.

When a player buys a premium Battle Pass, it sends a gift to all members of the player's guild.



Source: GameRefinery SaaS platform

Examples of various innovative Battle Pass implementations



Co-operative Battle Pass – Top War: Battle Game

Top War's Alliance Transportation Team is a shared Battle Pass between all Alliance members (guild members), meaning the progression in the reward track for the battle pass is shared. Each Alliance member completes their own tasks to gain progression. If a member wants to gain access to the premium track rewards, they have to purchase the pass separately.

This kind of co-op task implementation works well in games that focus heavily on guilds, and players are already used to working together towards common goals. Also, seeing and hearing the progression made by the Alliance and the available rewards in the premium track might convert players who would otherwise ignore the whole event into purchasing the pass.



Source: GameRefinery SaaS platform

Examples of various innovative Battle Pass implementations



Ad-monetized Battle Pass – Solitaire Home Design

Battle Pass can also be used in hybrid monetization models to get value from your non-payers through rewarded video ads. Solitaire Home Design's The Diamond Seeking event is an ad-monetized Battle Pass plan where players collect diamonds by passing the main solitaire levels on the first try to gain progression in the reward track of the event. There are free and premium reward tracks, but unlocking the premium track rewards requires the player to watch incentivized ads for each reward, or they can purchase the premium track directly to unlock it without watching the ads.

It's also worth noting that the three-day event is relatively short compared to the usual two to four-week lengths of battle passes. It also has a noticeably shorter reward track with simpler rewards, including normal currencies and consumable boosters.



Source: GameRefinery SaaS platform

How to take your **Battle Pass** to the next level

To summarize the learnings from the examples, here are the key takeaways:

- Want to encourage players to keep purchasing the Battle Pass(es) more regularly? Consider subscription-like benefits or even auto-renewing subscriptions to access the premium rewards.
- Additional incentives for purchasing the premium pass are commonly used in Battle Passes, but the piggy bank mechanic can add even more boost by converting non-payers through its nature of an attractive purchase.
- Does your game already have fully-fledged guild mechanics and a major focus on cooperation between players? Consider social mechanics for your Battle Pass, such as co-op progression in the reward track.
- Have a game that relies on ad monetization or want to boost your game's ad monetization? Consider using a Battle Pass with ad monetization.

As a bonus, here are two extra tips on the Battle Pass implementations we've seen on the market:

- *Free and premium reward tracks of the Battle Pass are proven to work, so consider utilizing them as reward mechanics for other events in your game as well.*
- *Have a game with various different game modes or an audience of different player types? Consider adding multiple Battle Passes or different Battle Pass difficulties to choose from.*



Gacha

Gachas are evolving – here's everything you need to know about the latest mobile game gacha innovations.



The popularity of gacha features continues to grow year on year

		Top 20% Popularity	Top 20% Difference	Overall Popularity
Limited time gacha		<div><div>46%</div></div>	+24	<div><div>22%</div></div>
		<div><div>81%</div></div>	+39	<div><div>42%</div></div>
		<div><div>68%</div></div>	+31	<div><div>37%</div></div>
Special gacha mechanics		<div><div>19%</div></div>	+9	<div><div>10%</div></div>
		<div><div>42%</div></div>	+23	<div><div>19%</div></div>
		<div><div>34%</div></div>	+16	<div><div>18%</div></div>
Number of gachas: 5+		<div><div>49%</div></div>	+20	<div><div>29%</div></div>
		<div><div>55%</div></div>	+15	<div><div>40%</div></div>
		<div><div>48%</div></div>	+15	<div><div>33%</div></div>
Shop with gacha mechanics / refreshing wares		<div><div>75%</div></div>	+18	<div><div>57%</div></div>
		<div><div>93%</div></div>	+24	<div><div>69%</div></div>
		<div><div>94%</div></div>	+21	<div><div>73%</div></div>

Source: GameRefinery SaaS platform



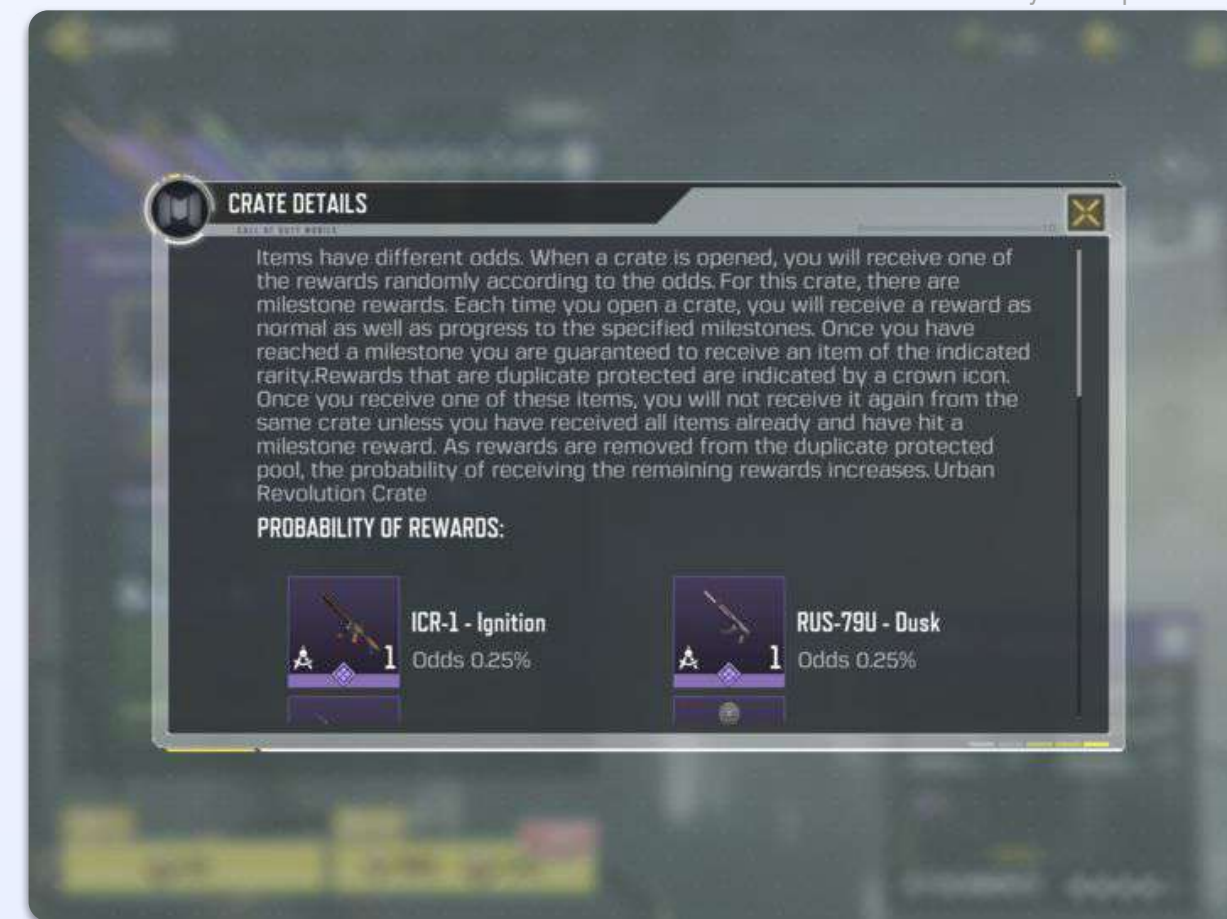
Kalle Heikkinen
Senior Game Analyst

Gachas are dominating the mobile game market at the moment, and the popularity of both gacha games and gacha features in traditional mobile games continues to grow year on year. 75% of the US market's top 20% grossing mobile games feature a shop with gacha mechanics or refreshing wares, while 49% feature five or more gacha types. In Japan, where gacha games are even more popular, these figures jump to 93% and 55%, respectively.

The reason behind these booming figures? The gacha system is one of the most effective ways developers can monetize their mobile games, especially as many gacha games are free-to-play, which incentivizes downloads. The loop-based mechanics and randomness of gacha rewards – where players pull the gacha in return for an in-game asset, whether that's a character, item or currency – keep players hooked. And as mobile game developers continue to innovate, new types of gacha implementation are popping up all of the time.

Innovative gacha implementations: Milestone/pity gacha

Source: GameRefinery SaaS platform



Call of Duty®: Mobile - Milestone/pity gacha

True to their name, pity gachas guarantee rewards once players have pulled the gacha a certain number of times. Many developers that implement this gacha mechanic in the West are transparent about rewards and specifically mention the rarity level of gacha rewards, so players know what to expect after so many pulls. This might mean they can expect a legendary gacha pull after four spins or a character of a certain level.

In the case of *Call of Duty®: Mobile*, players are rewarded with rare gachas after a certain number of pulls, and there's a progression bar underneath the gachas that shows how many more pulls are left for the pity gacha to be rewarded. *Genshin Impact* also uses pity gachas with characters as rewards, and while it doesn't display pull rates as precisely as *COD: Mobile*, it does outline specific details about how the mechanic works.

Innovative gacha implementations: Player's choice gacha

Player's choice gachas became popular in China during the summer of 2021. They work by letting players choose which items/characters/weapons etc., appear as gacha prizes or sometimes in the entire gacha prize pool.

The Chinese mobile games, *Three Kingdoms Fantasy Land* and *Punishing: Gray Raven*, have used player's choice gachas, but we've also seen these gacha mechanics appear in the West in *PUBG: New State* and *Genshin Impact*.



In Xin Xiao-ao Jiang-hu (新笑傲江湖) the player was allowed to choose the entire contents of the gacha prize pool from four different groups of items. This has been used in several events as well.



In Three Kingdoms Fantasy Land (三国志幻想大陆) the player has been able to select from two choices the main prize of a limited-time gacha on several occasions.

Innovative gacha implementations: Joint-pull gacha

Alongside more transparent gacha mechanics, you can also expect to see more social mechanics popping up in gachas.

Joint-pull gachas are a relatively new type of gacha that incorporate social elements into the pulling mechanic, but we're expecting to see much more of them in 2022 and beyond. The easiest way to think of joint-pull gachas is as co-op gachas: players can team up to pull gacha rewards, and all of those rewards are shared amongst everyone that participated in the gacha. We've come across gachas with joint-pull mechanics in the Japanese XFLAG titles *Kyoutou Kotoba RPG: Kotodaman* and *Monster Strike*.

Team building here works similarly to co-op missions: players create a private room for the gacha pull or can join a session with other players. Joint-pull gachas can still be activated by a single player, but they'll only get one reward, so it's always best to join up and play with as many people as possible. The social twist here makes it possible to coordinate the rewards with your team beforehand for the best possible outcome.



Kyoutou Kotoba RPG: Kotodaman (コトダマン - 共闘ことばRPG) - Joint-pull gacha

IAP Offers

What elements are game developers currently using to build powerful IAP offers?



IAP offers are one of the most established monetization features in F2P



Source: GameRefinery SaaS platform

The popularity of limited-time IAP offers



Almost all top-grossing games in the US include at least some sort of limited-time IAP offer.
The trend is similar in the Japanese and Chinese mobile gaming markets too.



Kalle Heikkinen
Senior Game Analyst

IAP offers are special in-app purchase discounts/bundle offers, usually available only for a limited time. There are multiple reasons that make them interesting:

- First of all, they are ubiquitous across genres and geographical markets.
- Secondly, they are one of the most established monetization features in F2P.
- And last but not least, there is a fair amount of innovation in terms of implementation.

Monetizing through **In-app Purchases** in general

Key takeaway from the perspective of IAP offers: For example, the traditional way to monetize Casual games via IAPs has been through core gameplay, meaning, energy, boosters, etc. However, what many Casual games have been picking up from Midcore games is monetizing through engagement.

Via core gameplay

*Offering players help in various core **gameplay** challenges*

Via meta layers

Offering players something to progress/engage in long-term

Monetizing through **In-app Purchases** in general

Key takeaway from the perspective of IAP offers: As the mobile gaming scene matures, the adoption of meta element IAPs has increased. Core game IAPs can still be the primary focus, but meta has opened a way for "hybridizing games," bringing gamers a sense of progression and diversity.

Some of the most successful meta layer types used in games

Narrative elements to increase sense of immersion and progress



Lily's Garden



Word Villas



Project Makeover

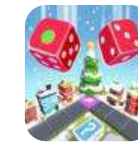
Light construction & customization mechanics (decorative or small boosts)



Project Makeover



Zen Match



Board Kings

RPG mechanics of items, characters used in the core gameplay



Mr. Autofire



Art of War: Legion



Idle Mafia

Collectible items/characters (stickers, mascots, etc.)



Yahtzee with Buddies



Disney Emoji Blitz



Game of Thrones Slots

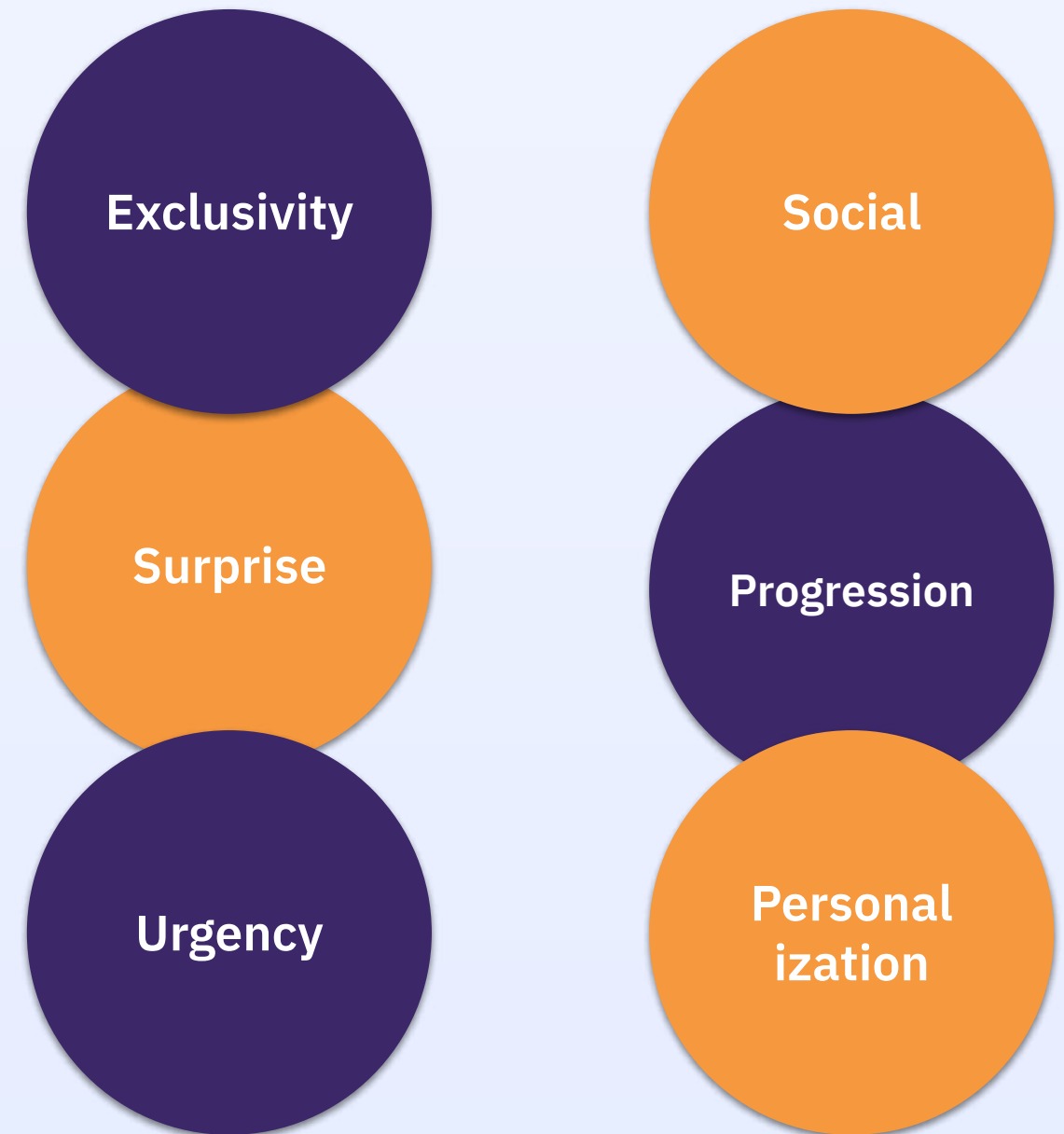
Effective **IAP offers** play with human emotions and motivations



Kalle Heikkinen
Senior Game Analyst

Best offers play with human emotions and motivations. For example, the following elements can be utilized to design a powerful IAP offer:

- **Exclusivity** – *"This is the only way to get my hands on this character skin!"*
- **Surprise** – *"I might get a valuable character skin for a very little investment."*
- **Urgency** – *"I need to purchase this character skin right now. Otherwise, I'll miss out on this deal."*
- **Social** – *"If we all invest, we can all get this character skin."*
- **Progression** – *"If I just buy a little bit of more gems, I can get that character skin as a bonus reward!"*
- **Personalization** (even if implicit) - *"Wow, This is exactly the item I need right now!"*



Examples of various innovative IAP offer implementations



Mystery Shop IAP event - Garena Free Fire

Garena Free Fire's limited-time IAP event Mystery Shop gave players a chance to try their luck to win a discount offer of up to 90 percent. The game randomly raffled off a discount percentage for the player, which determined the price at which the player was allowed to purchase products from the event shop. The offer also included a progression element, meaning that the more stuff the player purchased from the store, the more the progress bar was fulfilled, and once it was full, the player could buy the special grand prize.

First of all, this kind of implementation has a sense of urgency since you only have seven days to engage with the event. Secondly, it has a progression element, meaning that the more you buy things from the store, the more rewards you can get. Lastly, it also has an exciting surprise element with the randomized discount percentage.



Source: GameRefinery SaaS platform

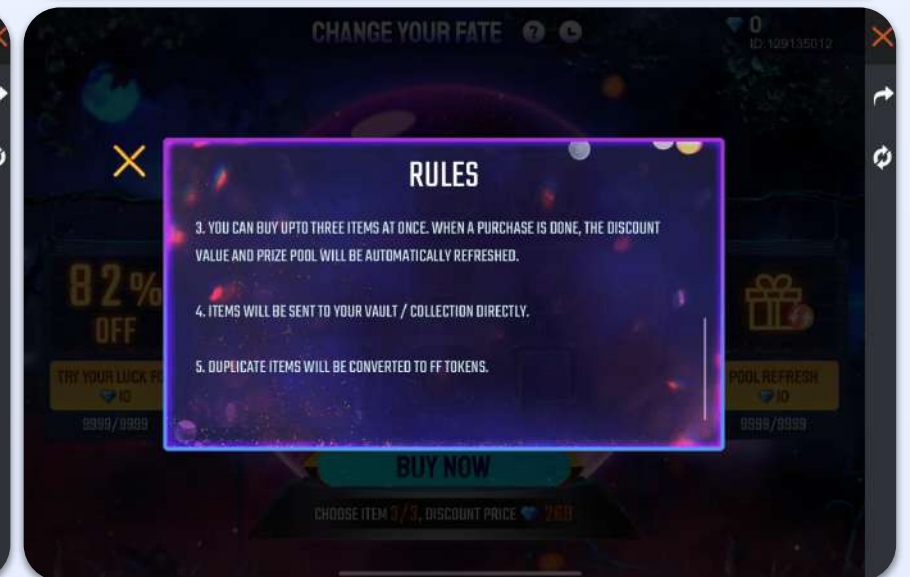
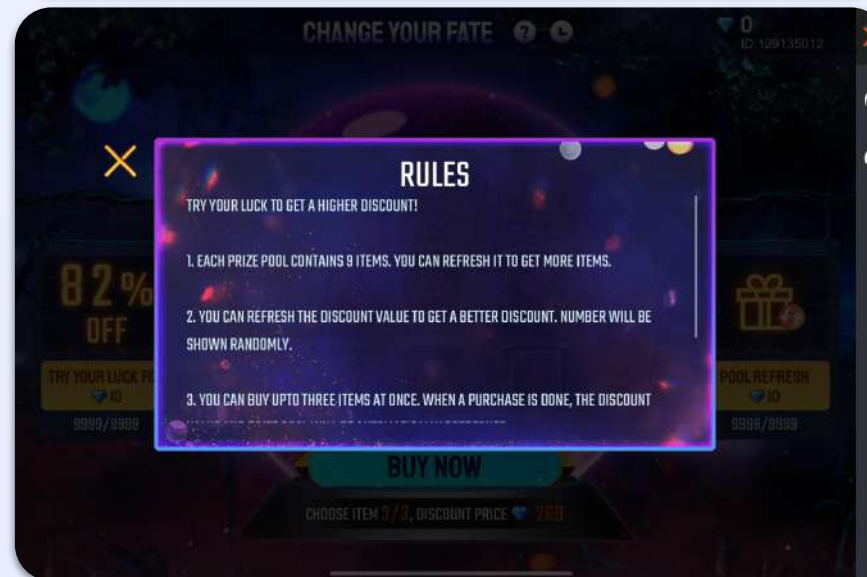
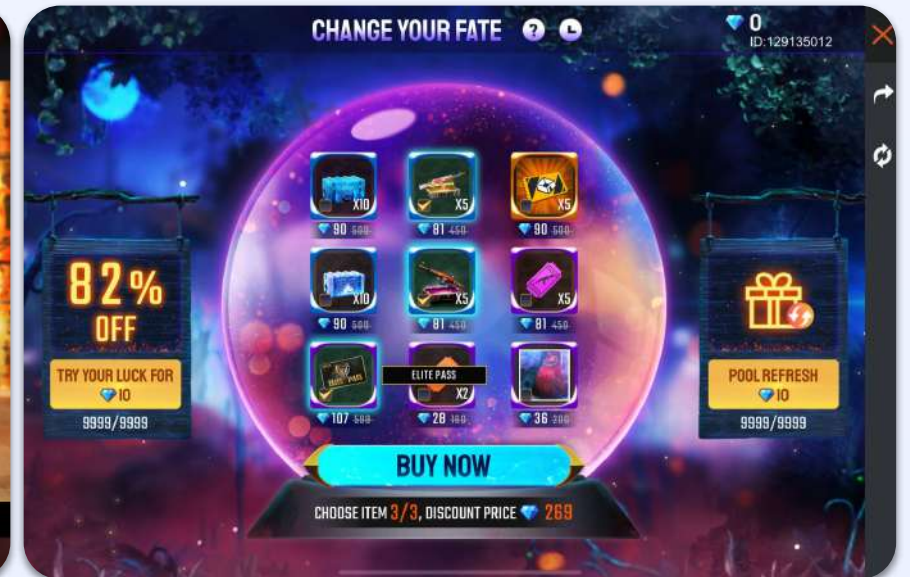
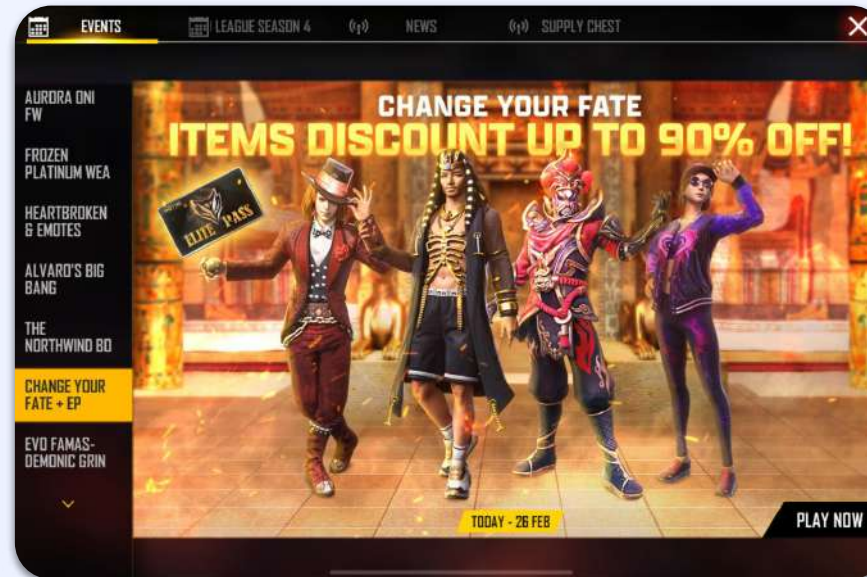
Examples of various innovative IAP offer implementations



Change Your Fate IAP event - Garena Free Fire

Another interesting example from Garena Free Fire is its Change Your Fate limited-time IAP event. In essence, it's a bundle offer, but what makes it exciting is that the players have control over the contents of the bundle as well as the price of the bundle. In practice, it means that if the player purchases the pool refresh action, they can refresh the content of the bundle pool. In the same way, they can try their luck to change the discount percentage of the bundle.

This interesting implementation gives the player a sense of control over the bundle offer, as well as a sense of excitement and surprise with the refresh options of the content and the discount percentage.



Source: GameRefinery SaaS platform

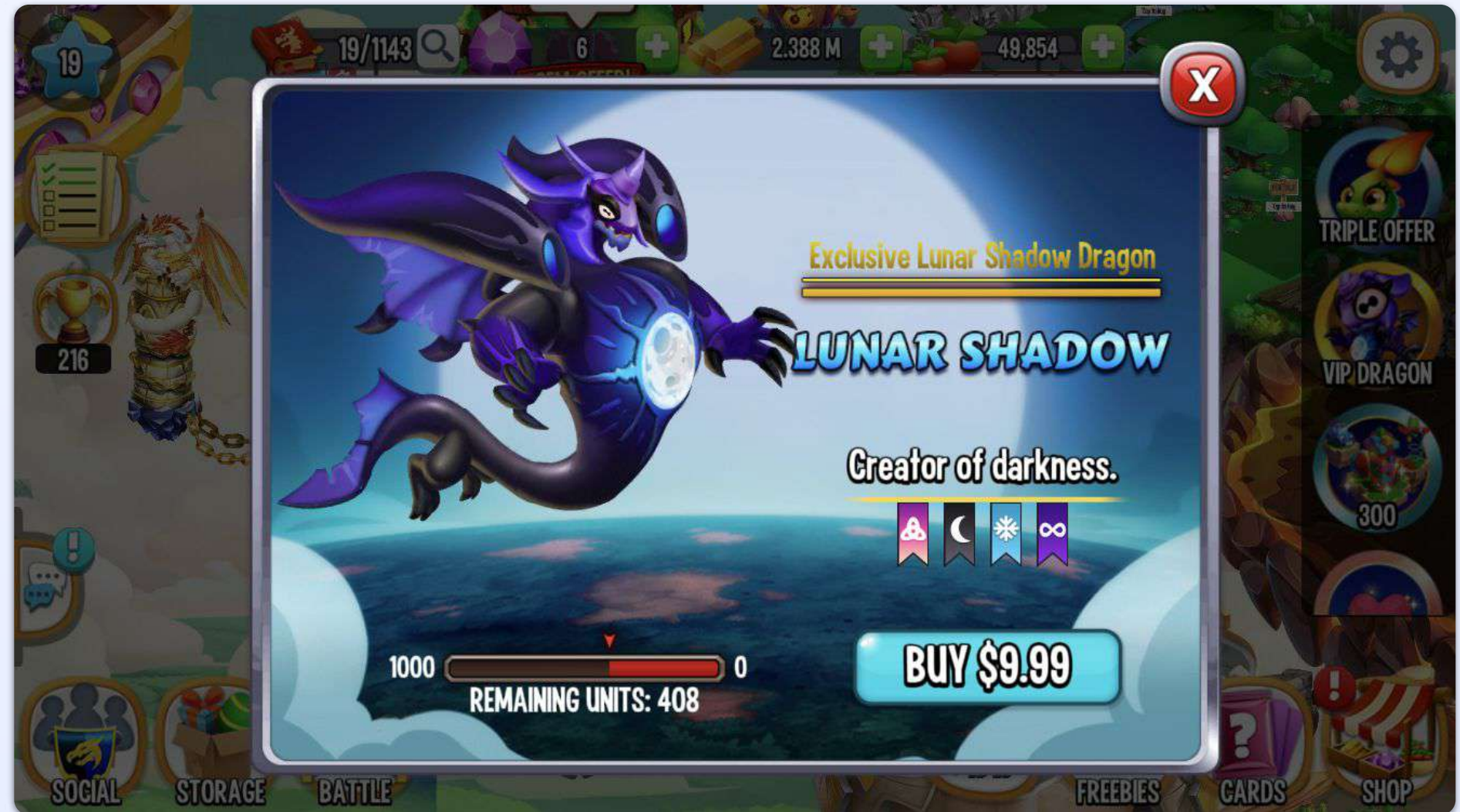
Examples of various innovative **IAP offer** implementations



Limited quantity IAP offer - Dragon City Mobile

It is possible to use other means than time to create a sense of urgency in a special promotion. Dragon City Mobile applies quantity-based limitations in some of its offers.

It could be argued that this approach adds even a slight social aspect to the mix, as the time remaining to take advantage of an offer (at least in theory) is dependent on the actions of other players.



Source: GameRefinery SaaS platform

Examples of various innovative **IAP offer** implementations



BK Birthday Party progressive limited-time IAP offer - Board Kings

Board Kings' birthday offer combined a daily login gift and an IAP offer. So what it means is that by logging in daily, players got a free reward. Of course, this is pretty basic stuff, but players also got to see a sneak peek of some of the additional rewards they could get if they opted for these very low-priced IAP offers. Moreover, to make the low-priced offer even more lucrative, players could see what extra free rewards they would get access to if they purchased the \$1.99 offer.

Psychologically speaking, presenting the offer this way makes it seem more appealing because who doesn't love to receive free stuff *(if you just make a tiny additional purchase first...)*.



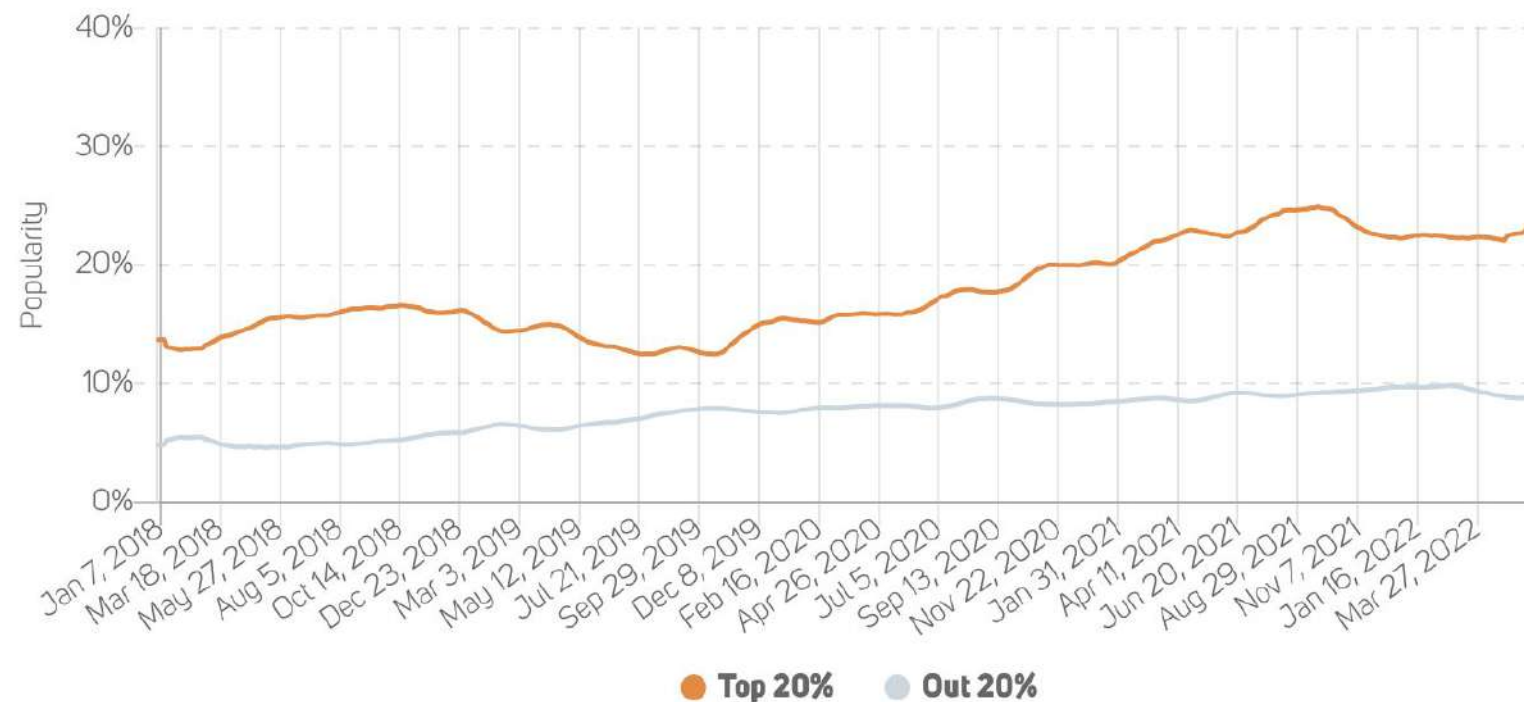
Source: GameRefinery SaaS platform

Progressive IAP rewards have been gradually increasing in the US for the past two years



Source: GameRefinery SaaS platform

The popularity of progressive IAP rewards



Around 23% of the US (iOS) top 20% grossing mobile games utilize progressive IAP rewards to encourage players to spend or purchase either real money or premium currency, while only 9% of games outside the top 20% use them.



Kalle Heikkinen
Senior Game Analyst

Another creative way to implement an IAP offer is by combining it with progressive rewards. This type of implementation has gradually increased in the US mobile gaming market for the past two years.

What the feature means in practice is that the game tracks the amount of real money/premium currency players have spent/purchased since they started playing the game OR during a certain period of time (usually during special events or holidays) and gives a one-time gift to the player when certain spending threshold is passed. This means the more money/premium currency players spend/purchase, the bigger prizes they are entitled to. Usually, the prizes include energy, items, rare characters, or premium currency.

Examples of progressive IAP rewards



PUBG MOBILE - Progressive IAP rewards



Garena Free Fire - Progressive IAP rewards

Progressive IAP rewards are a great way to incentivize players to spend or purchase either real money or premium currency in your game. Explore more examples of progressive IAP reward implementations to get inspiration for your own game by using our [Implementation Examples tool](#) in the GameRefinery service.

The key takeaways from the **IAP** examples



1. Look beyond your genre and target market for IAP offer inspiration

- Don't be too narrow-minded when seeking inspiration for your IAP offers. You can find great examples and inspiration across different genres as well as various geographical markets.

2. Think about what emotions and motivations to attach to your IAP offer

- Think of the emotions that your IAP offer triggers and why players interact with your offer? And how can you enforce those?

3. Think not only HOW, but also WHAT

- In the examples, we mainly focused on the how part of how to build an IAP offer, but equally important is the what part such as: what is the content that you're selling to your players?



Kalle Heikkinen
Senior Game Analyst

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

Visit our website at www.gamerefinery.com and log in for free!

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

GameRefinery is part of Liftoff. Learn more about Liftoff at www.liftoff.io



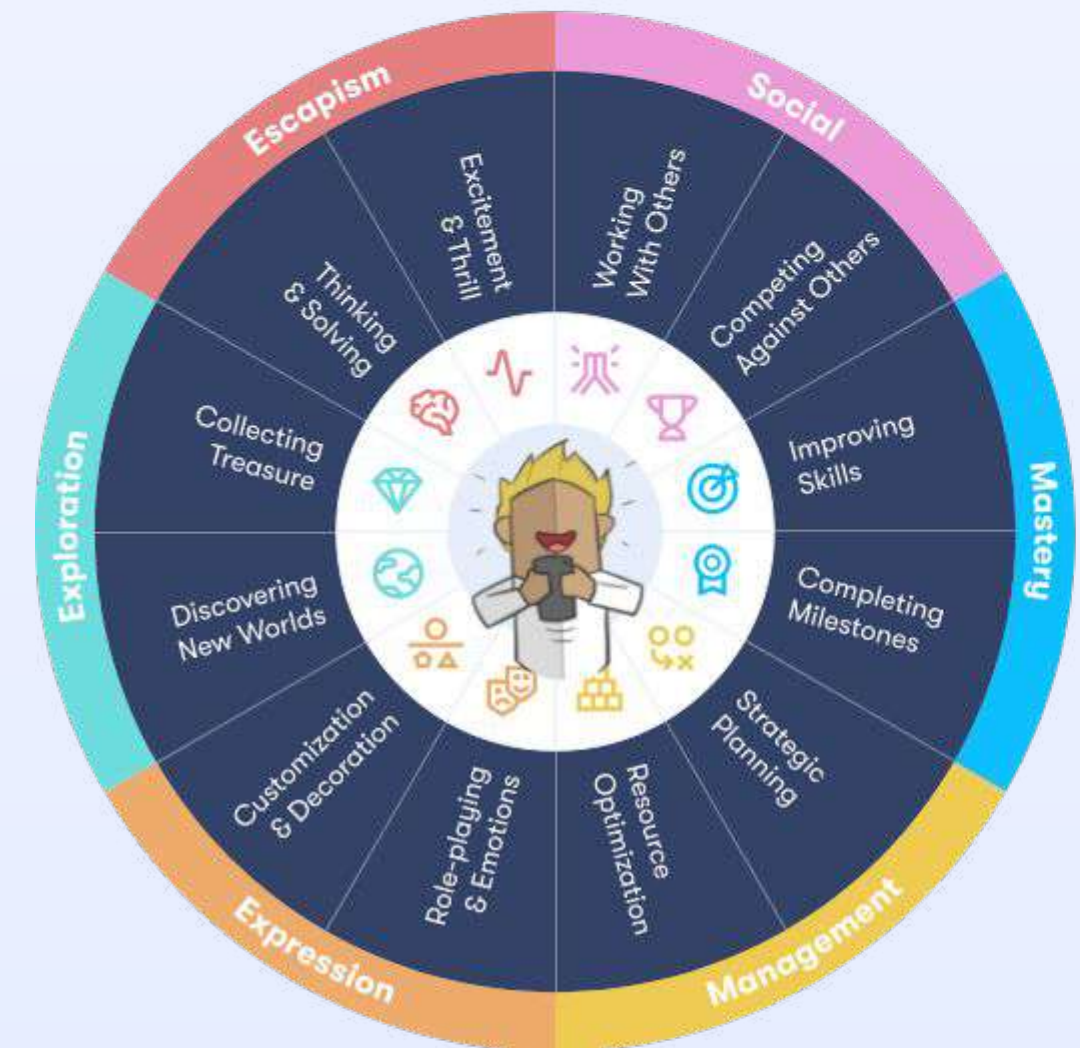
GameRefinery
A Liftoff Company

We Know Mobile Games

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

Get started with the [GameRefinery SaaS](#) service to start delving into market data and player insights for thousands of games

12 Player Motivations



1. Choose Market

US

2. Select optional categories

GENRES

Casual, Mid-core

SUBGENRES

Build & Battle

3. Select optional Filter

Session Length Game Progression

Gacha Tap & Monetization

Live Events Appointment Mechanics

Clash of Clans
Supercell

Build & Battle

FEATURE INDICATORS

Powerscore 82

Skill Thinking

MONTHLY PERFORMANCE

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