

# GameRefinery

By Vungle

## Shooter Genre Snapshot

September 2021



# 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 **Shooter genre under Mid-core**



# Short Shooter Genre Overview



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*Shooters have become a very significant genre in mobile gaming in the past couple of years. It is the 6<sup>th</sup> largest genre in the US iOS market, contributing around 6% of the market's revenues.*

*Epic and Apple's legal battle that led to Fortnite's removal from the App Store took away one of the "big shots" of the genre back in August 2020. Currently, there are only seven shooter games in the top-grossing 200, with over 84% of revenue coming from the "Big Three" - Call of Duty: Mobile, PUBG Mobile and Garena Free Fire. Garena Free Fire has been the standout growth rocket of the year, more than doubling its revenues on iOS in the US.*

*Overall, the market has been very quiet in terms of new successful shooter games for a while. None of the new Shooter games released within the past TWO YEARS has managed to make it into the US top-grossing 200. The latest game to do this, Zooba, was released back in 2019. Even if we widen the scope to the top-grossing 500, only one new game, Bullet Echo, was released over a year ago (May 2020).*

*Call of Duty Mobile's highly successful mobile port has inspired many AAA developers to move to mobile. With it being more than two years since the last top-grossing shooter launched, there are some promising contenders on the horizon from the biggest developers out there. These include Valorant Mobile, Apex Legends Mobile, Battlefield Mobile, and Final Fantasy VII: The First Soldier. Will these games successfully challenge the "Big Three" of mobile shooters and bring fresh blood to a stagnant market in the upcoming months? That remains to be seen.*



# Key points



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- Currently Shooters are the 6<sup>th</sup> largest genre in the US iOS market, contributing about 6% of the market's revenues.
- The obvious major shake-up to the shooter genre was the lawsuit battle between Apple and Epic leading to Fortnite being removed from the App Store. After all, before the removal it had over 30% market share of the Shooter market in the US on iOS.
- This has led to the other “Big Three” competitive shooters (CoD: Mobile, Garena: Free Fire, PUBG Mobile) taking market share for themselves. Garena: Free Fire in particular has seen exponential growth during the past year, more than doubling its revenues. It has grown from a mere 10% market share to equal share at the top with a bit under 30% market share of the genre.
- The shooter market has been very stagnant during the past year → not a single new game has been able to break into the top grossing 500
- It is quite rare that top shooters bring new bigger features to the game, but the content cadence of new cosmetics, limited-time game modes, events, maps etc. is mind-bogglingly high in the most successful games
- Monetization in most top shooters relies heavily on the popular Battle Pass as well as a constant flow of limited-time gachas with various special mechanics

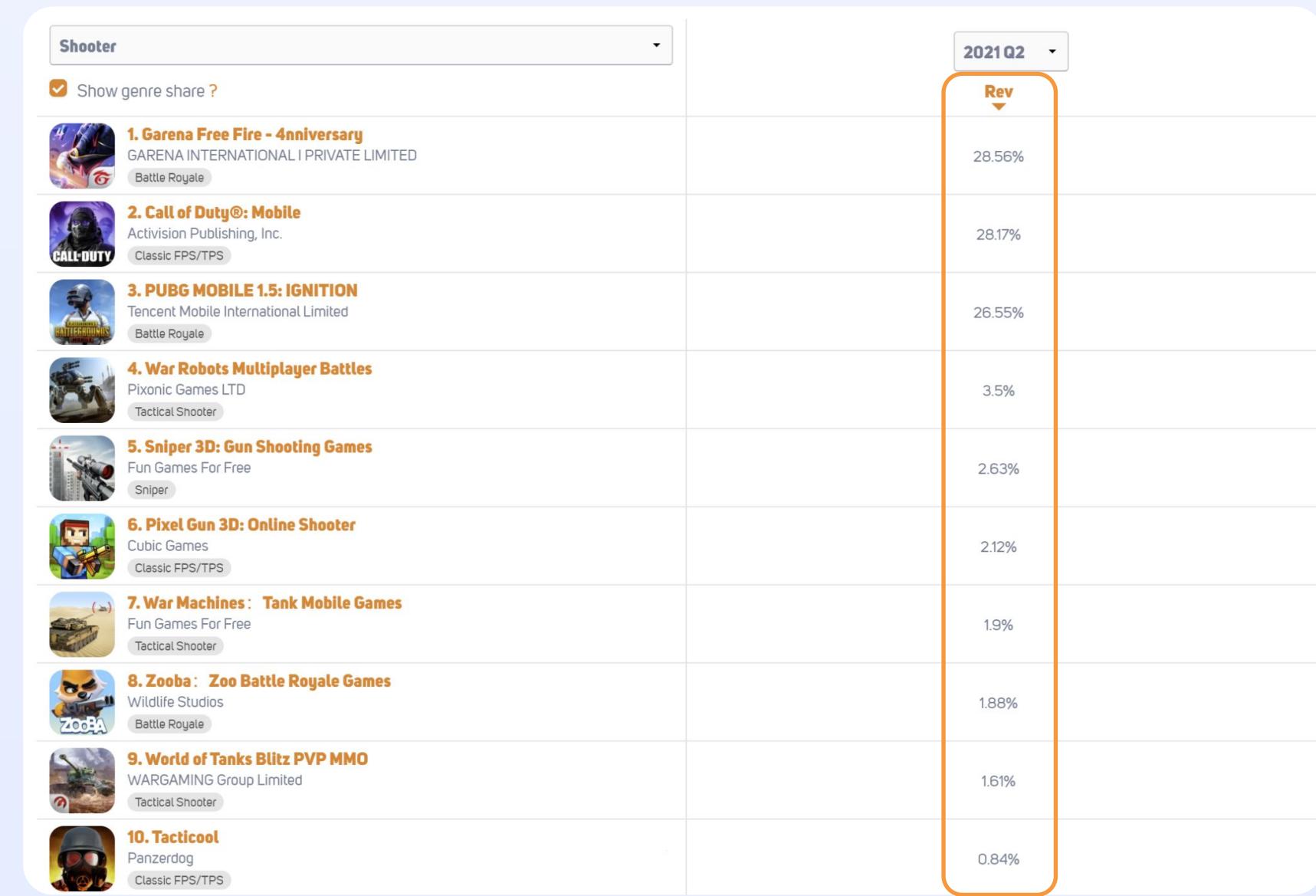
# Market

- Top games and their market share



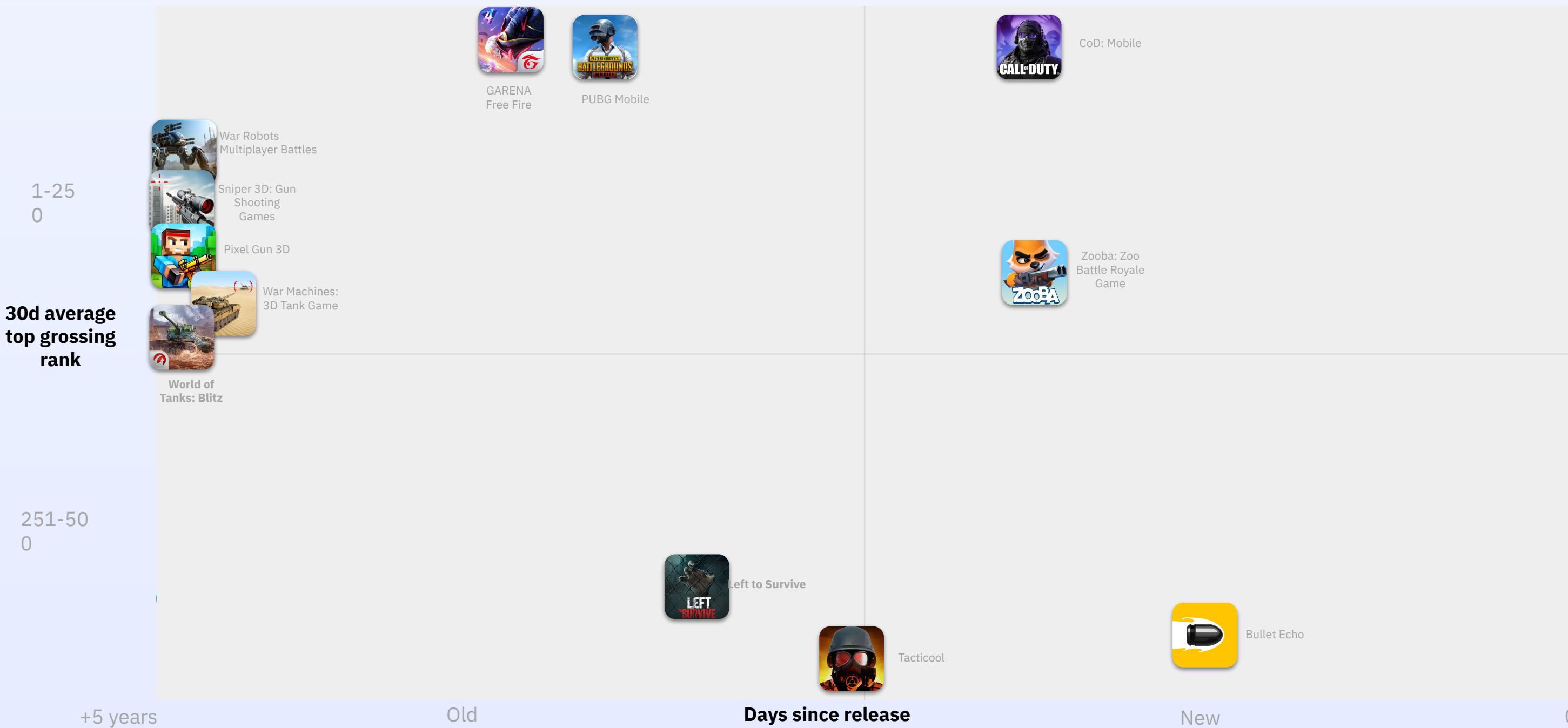
# Top games and their current market share within the Shooter genre in the US on iOS

**Key takeaway:** The shooter space is currently dominated by Garena Free Fire, Call of Duty: Mobile and PUBG MOBILE. The biggest changes during the past year were the appstore removal of Fortnite and the massive rise of Garena Free Fire. While there wasn't a drastic change in the revenues of other top Shooters, Garena Free Fire was able to pull off an incredible climb, more than doubling its quarterly revenue and overtaking PUBG and CoD. It is now neck and neck with CoD as the top shooter for Q2 of 2021.

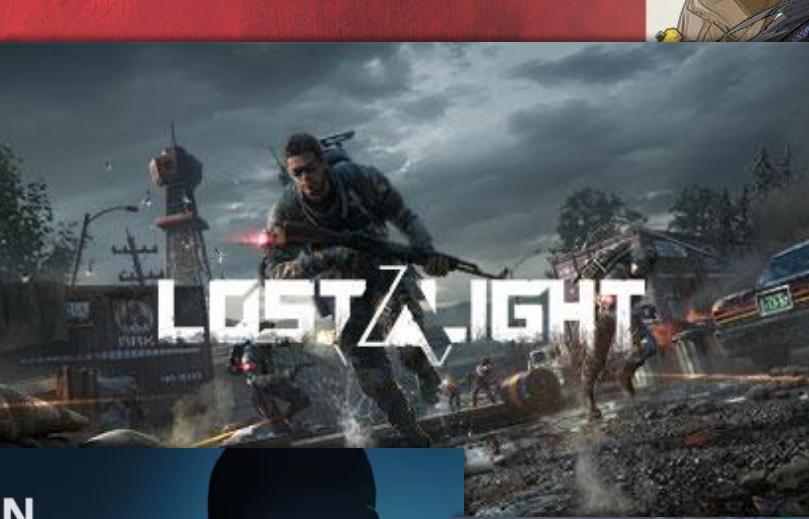
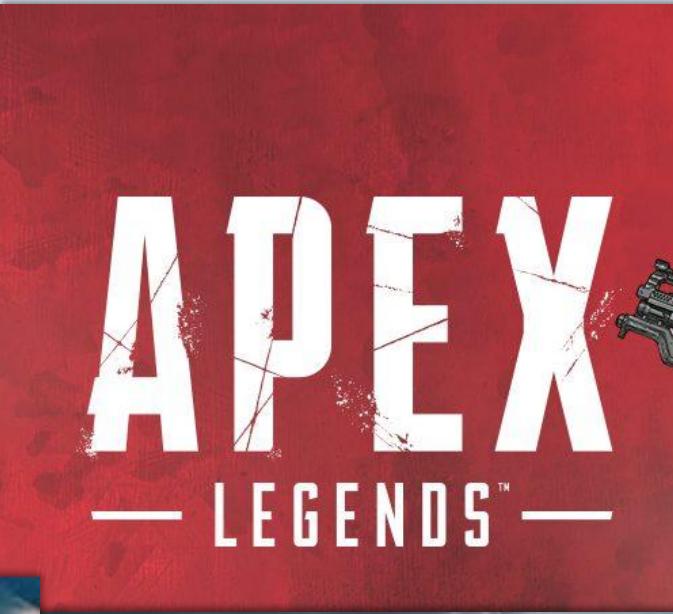


# Top games and challengers in the Shooter genre (US iOS)

**Key takeaway:** As we can see from the chart, there has pretty much been ZERO new blood in the Shooter market in the past few years. *Bullet Echo* is the newest game among the top grossing 500 games in iOS and it was released over a year ago (May 2020). Perhaps the most noteworthy thing has been Garena: Free Fire's massive growth to become as big as CoD: Mobile and PUBG Mobile.



# What does the future hold for the mobile **Shooter** genre? (Upcoming announced games)



# What does the future hold for the **Shooter** genre? (Upcoming games) (US iOS)

- The shooter market has been super stagnant in recent years, but as we can see from the previous slide → currently there's a huge amount of upcoming announced titles with several big IPs attached to them
- It's noteworthy that there is a lot of variety among those titles. e.g.
  - **Valorant + Project M**, 5v5 class-based tactical shooters
  - **Apex Legends**, class-based Battle Royale
  - **Lost Light**, survival shooter in the style of *Escape From Tarkov* or *Metro Royale-mode* in *PUBG Mobile*
  - **Final Fantasy VII: The First Soldier**, class-based Battle Royale with RPG elements
  - **Garena Free Fire MAX**, enhanced version of Garena Free Fire - players able to sync their Free Fire progress to the new game
- Will these games challenge the “Big Three” of mobile shooters and bring fresh blood to the stagnant market in the upcoming months/years? Will they be able to gain a wide enough user base / push out the crazy amount of constant content needed to satisfy/monetize that audience, like the current top shooters do? That remains to be seen, but there are plenty of companies now trying for sure



Valorant on PC



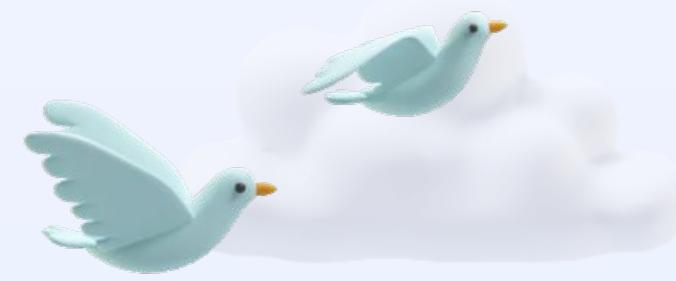
Apex Legends Mobile



Lost Light



Final Fantasy VII: The First Soldier



# Features & Updates

- Top updates
- Implementation examples

# Top updates of Call of Duty: Mobile for the past year

Version Date	POWERSCORE®	Revenue	Downloads	REV / DL	Features
Jul 28, 2021 1.0.26 CONTENT EVENT FIXES	94	▲ +27% +\$467.60k	▲ +34% +83.30k	▼ -5% -\$0.39	Updated Features  Ad Type - Incentivized Video Battle Pass plan Daily free gift Dynamic competitive league/ladder Gacha Mechanic in Incentivized Video Incentivized Video - Tangible Reward Limited time gacha Limited time IAP-offers Live events - Non-recurring Live events - Recurring Number of different decoratives - Accessories : 51+ Number of different decoratives - Other : 51+ Number of different decoratives - Skins : 51+ Number of levels : 21 to 50 Periodical gift/quest Progression element in daily reward Progression Mechanic in Incentivized Video Special gacha mechanics Special rewards from live events
May 20, 2021 1.0.22 CONTENT EVENT FEATURE	94 ▲ +3	▲ +42% +\$767.50k	▲ +13% +21.70k	▲ +27% +\$2.77	Feature Changes  Competitive co-op - Guild wars/competitions    X → ✓ Incentivized Video - Temporary Boost    X → ✓ Number of Ad-placements    1 → 2 Number of different currencies    2 → 3 to 4 Promotional collaboration events    X → ✓ Social/PvP currency    X → ✓  Updated Features  Ad Type - Incentivized Video Battle Pass plan Daily free gift Dynamic competitive league/ladder Guild mechanics Limited time gacha Limited time IAP-offers Live events - Non-recurring Live events - Recurring Number of different decoratives - Other : 51+ Number of different decoratives - Skins : 51+ Number of gachas : 5+ Number of levels : 21 to 50 Progression element in daily reward Special gacha mechanics Special rewards from live events

All the top Shooter games follow a similar pattern of releasing content. All are based on various seasons (Battle Pass, ranked seasons etc.) that pace the games and their bigger e.g feature releases. On top of this, over the course of seasons there are numerous “smaller content” update in the form of events, cosmetics, gachas, bundles, smaller limited-time game modes etc.

If we look Call of Duty: Mobile in the past year, there are two quite clear massive updates (outside of various events) to the game: Clan War and the re-release of the Zombie mode.

# Top updates of Call of Duty: Mobile for the past year

## Update 1.0.26



**Erno Kiiski**

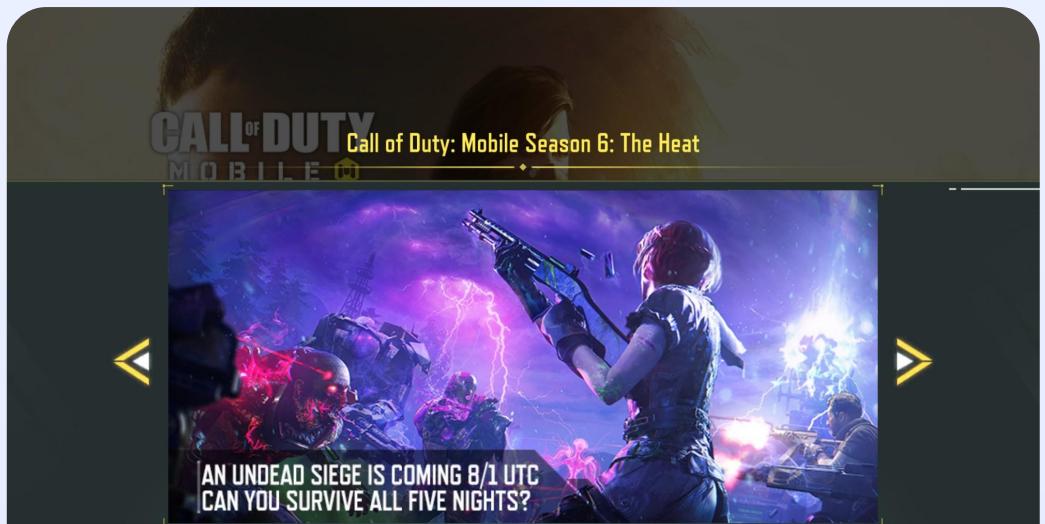
Game Analyst

The next big season update is here! This update brings of course the new season along with the new [Battle Pass](#), [new ranked seasons](#), new [maps](#), tons of new cosmetic content through BP, [gachas](#), direct store, [event rewards](#) as always.

But during this update the main attention definitely goes to the "resurfacing" of the [Zombie Mode](#). CoD Mobile tried out it's version of the popular CoD zombie mode back in 2019, but it didn't work out and they removed the mode quite quickly, but now the mode is back with new different tweaks. It launches as a limited-time mode only (therefore we're not yet changing the feature set accordingly), BUT there's clearly even more extra efforts in this limited-time mode compared to many others. BUT considering how it's built AND if the reception is good, most likely it will become a new permanent mode later on.

How it works then? Player go in to the matches in 4-man teams. It has all voice-acted cutscenes setting the scene and overall very high production values (what else you would expect from CoD Mobile anymore). The game mode is based on survival. During the day players scavenge items across the map: weapons, ammo, equipments, material items for building/upgrading turrets and so on. Then during the night, zombies attack and players have to survive/defend their base until the sunrise. This cycle repeats three or five times (depending on difficulty chosen) and if the team survives that --> match is won. During the match there's a [specific currency](#) (earned from killing zombies + from crystals across the map). This currency is then used to [upgrade your turrets](#) in your base + you can make purchases from the [base's vending machine](#) for the duration of the match.

Players can collect various cosmetic rewards [by just completing matches](#) AND [completing tasks](#) in order to get "zombie mode specific XP" which progresses its own "[reward road](#)". What is also very interesting in the game mode is that there's a slight power progression meta implemented in this game mode --> players earn crystals from matches which can be used to level up various [Talents](#) --> which permanently boost different statistics for the matches onwards (e.g. Turret damage, weapon damage, health etc.).



Source: GameRefinery SaaS - Game Update overviews

# Top updates of Call of Duty: Mobile for the past year

## Update 1.0.22



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Game Analyst

A lot of interesting things happening in this month's CoD Mobile update:

- 1) **80s Action Heroes**- collaboration event. Players can purchase [Rambo/Die Hard bundles](#) to get for example Rambo/John McClane skins. This collab event also included a limited-time game mode [Guns Blazing](#). It is pretty basic Free-for-All Deathmatch mode, but the twist is that you're constantly accumulating "rage". When the "rage meter" fills fully, you can transform into a super soldier with two gatling guns (Rambo or John McClane).
- 2) **Clan Wars**. Totally new feature for the game. It is a feature that pits 6 different Clans against each other in weekly competitions. Clans compete in [controlling various nodes](#) in the Clan War map. How it works is that players earn score for each node by completing specific tasks (e.g. use specific weapons in specific game modes). You can get bonuses for your score from various things as well (e.g owning the Battle Pass, playing with friends and not randoms, clan leader can set one "key node" with bonus score etc.). Each Clans' scores are calculated together = Clan score for that node. Then all the six Clans are ranked for each node based on their scores. Each node has different lengths during the week and not all are open straight away. When the week closes, Clans get trophies accordingly which dictate their overall Clan ranking for the next Clan War. Each player also gain new [Clan currency](#) based on the Clan's performance over the week. This currency can be used in a new [Clan Store](#) to redeem various exclusive cosmetic rewards.
- 3) Second incentivized ad-placement. After playing a match the game now offers to watch an ad to [double your weapon xp](#) gain for the next match.
- 4) BUNCH of different [limited-time gachas](#) for various cosmetics over the course of the update. (Most of the gachas use the "box mechanic" meaning that each reward you pull goes out of the reward pool --> chances for more rarer items grow for the next pull, but the price of the pull also goes higher)
- 5) New season for the [Battle Pass](#) + new [ranked season](#) (which includes a chance to participate in the [World Championships of CoD Mobile 2021](#)) + new [seasonal quests](#) + [new map](#) etc.
- 6) Over the course of the update there are also several [limited-time game modes](#) beside the collaboration game mode. (At time of analysis for example Capture the Gold + Grind)



# Top Shooter Implementation Examples: Battle Pass Evolution



## PUBG Mobile – Royale Pass

Battle Pass has been one of the must have features in top grossing shooters since Fortnite, as it synergizes extremely well with the cosmetic economies the games focus on. Nowadays we have also seen various iterations of the typical Battle Pass mechanic - one of the most innovative ones being PUBG Mobile's Royale Pass.

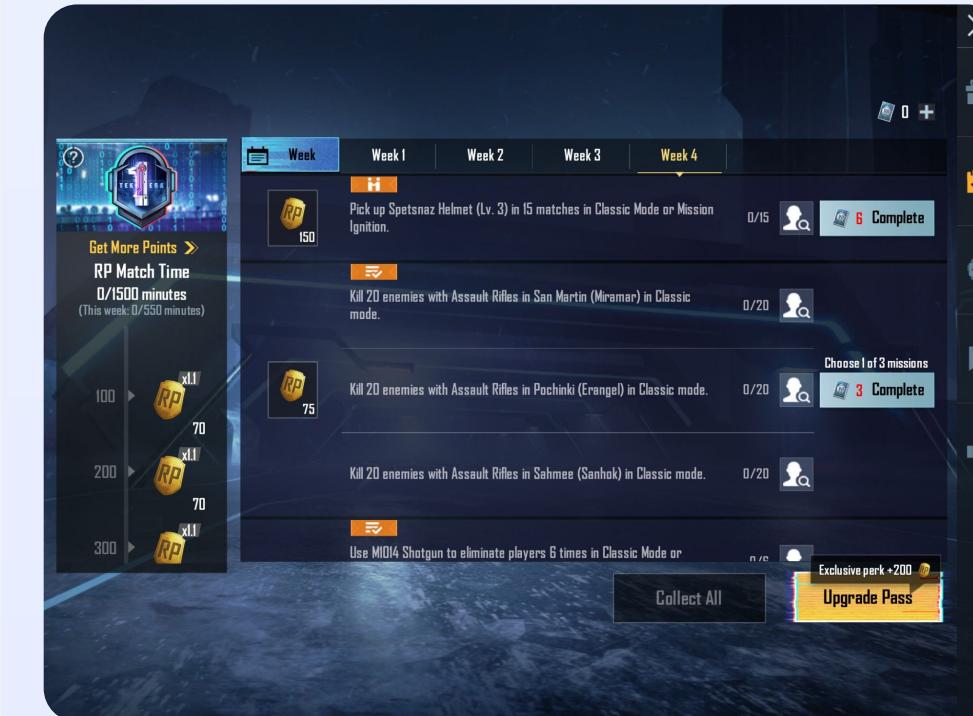
The basic idea is still the same of a “free and paid layer”, but there are lots of twists to the basic formula.

Some of the innovations include:

1) Battle Passes traditionally are very personal. You grind your own quests and reach rewards thresholds alone. But PUBG innovates in this aspect as well with the RP Team feature. When you have purchased the season's Battle Pass, players can form or join an RP Team. It gives rewards for every team member based on 1) the number of players in the team and 2) the Battle Pass rank of all the players in the Team summed up together. This adds “social pressure” to carry your own weight so everybody can reach the best rewards.

2) Traditionally Battle Pass progression is earned either directly as a gameplay reward OR with a task-based system. On top of this PUBG Mobile offers rewards for Match Time.

These are just a few examples of small tweaks to the PUBG Battle Pass. [Read this blog post](#) for more on how it has evolved.

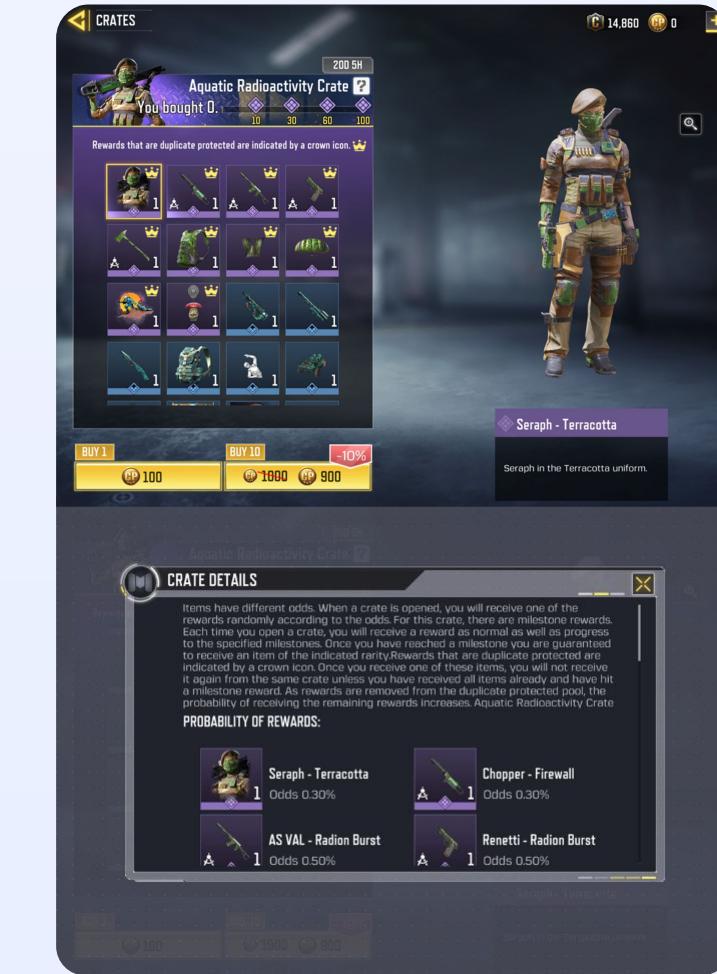
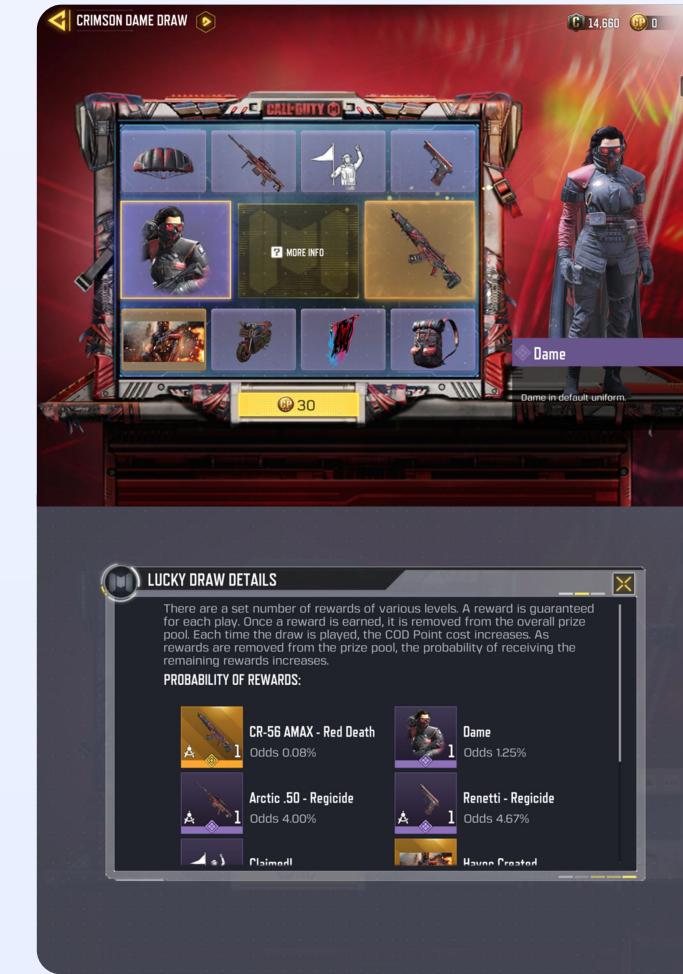


# Implementation examples from top Shooter games: Gacha monetization - CoD: Mobile

A lot of the top shooter games are almost purely based on cosmetic economies (or skins with minor power benefits like Garena). So how do they make their money then? First of all the content cadence is off the roof with the amount of various cosmetic types/pure volume of items these companies push out. One of the main mechanics of selling these cosmetics are gachas.

CoD: Mobile currently offers two types of gachas: *Draw Gachas* and *Milestone Gachas*.

Source: GameRefinery SaaS Dashboard



## Draw Gacha

Draw gachas are always available for a limited-time. There are always 10 items per one gacha. When you pull from the gacha, the item received is removed from the reward pool + the price of the next pull increases + the odds for rarer items increase.

This is clearly the main way CoD:Mobile offers their most detailed/unique skins on top of the Battle Pass

## Milestone Gacha

When players reach a certain number of pulls, you get a guaranteed purple rarity item (the rarest items in these gachas). Purple rarity items are "duplicate protected" so players can't get duplicates of those. If players get a purple item, it's removed -> increases chances for rest of the purple items. It is possible to get duplicates for other more common rarity items which are transferred to soft currency automatically.

These gachas are always offered for a limited-time only.

# Implementation examples from top Shooter games: Gacha monetization - Garena: Free Fire

A lot of the top shooter games are almost purely based on cosmetic economies (or skins with minor power benefits like Garena). So how do they make their money then? First of all the content cadence is off the roof with the amount of various cosmetic types/pure volume of items that these companies push out. One of the main mechanics of selling these cosmetics are gachas.

The majority of cosmetics in Garena Free Fire come from three main types of gachas: *Luck Royale*, *Web events* and *store crates/boxes*.

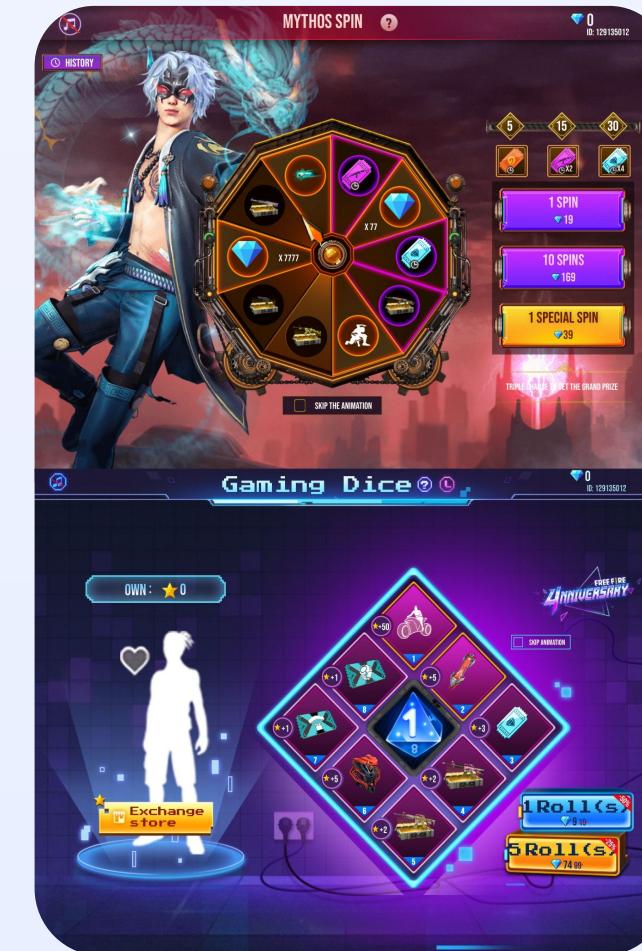
Source: GameRefinery SaaS Dashboard



## Luck Royale

Luck Royale gachas are always available for a limited-time each having special mechanics. There are 4 different types of gacha mechanics including Royale and Lucky Wheel incubator gachas.

Royale gachas have a huge pool of rewards, with increased chances of the main reward on each pull. Lucky Wheel incubator gachas reward material items which are used to craft the main rewards inside the “incubator” of the gacha.

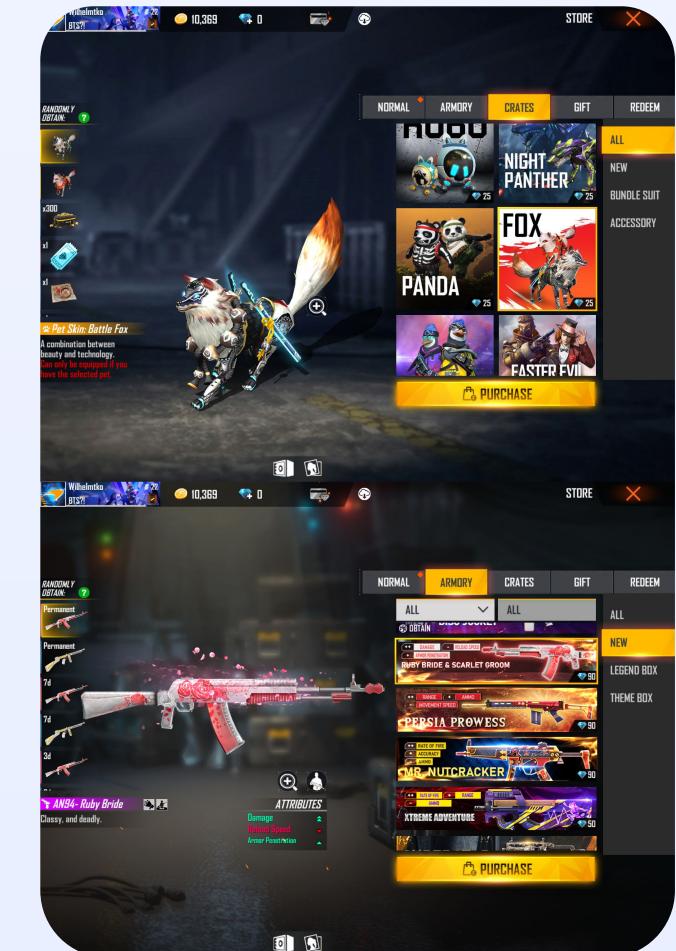


## Web events

Web events are limited time monetization events with many of them having a gacha mechanic. These gachas include:

Spin gachas with rewards from consecutive spins and option for a special spin which costs more but triples the chances for the main reward.

Dice gachas reward items and currency, which is used in the gacha's special shop to buy more items.



## Store crates/boxes

The in-game store has various cosmetics but many of them are gachas instead of direct purchases.

The crates contain various rewards depending on the crate, from material items to cosmetic accessories and pets. The most direct way of purchasing weapon skins is from boxes, but those are gachas as well with a pool of skins of a certain weapon theme, including high chances of only receiving trial versions of the skin.

# Implementation examples from top Shooter games: Cosmetic collection system - PUBG Mobile

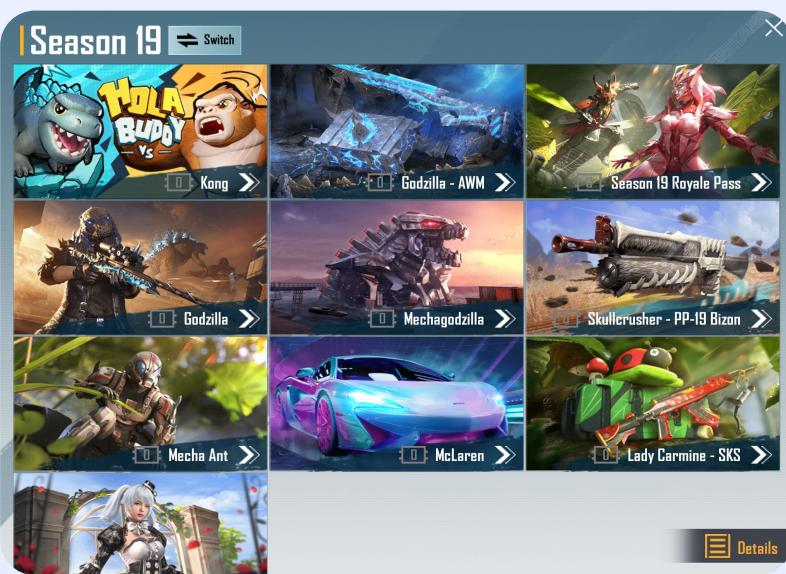
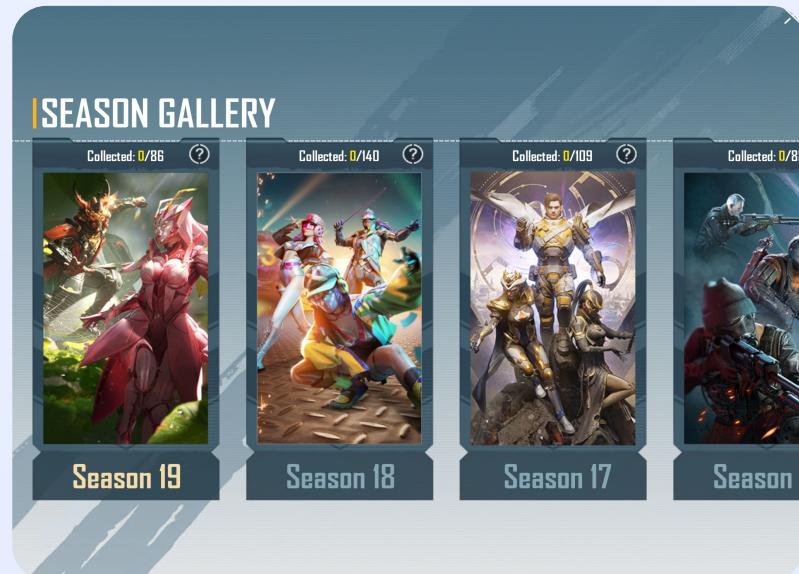
As the top shooters rely almost purely on cosmetic economies, it's important to not just offer a huge variety of different cosmetics to collect, but also have systems in place to support and incentivize the collecting.

PUBG has two features incentivizing collecting even further: Show Room and Season Gallery. Show Room lets players easily curate and show off their favourite cosmetic items to other players. Season Gallery then taps into the completionist motivation by rewarding players for completing collections and visualising how much they have completed.

Source: GameRefinery SaaS Dashboard



Show Room



Season Gallery



[Get more data and  
implementations, login or contact us!](#)



# Motivations

- The motivation framework
- Top game's motivation comparison

# GameRefinery's Motivation Framework

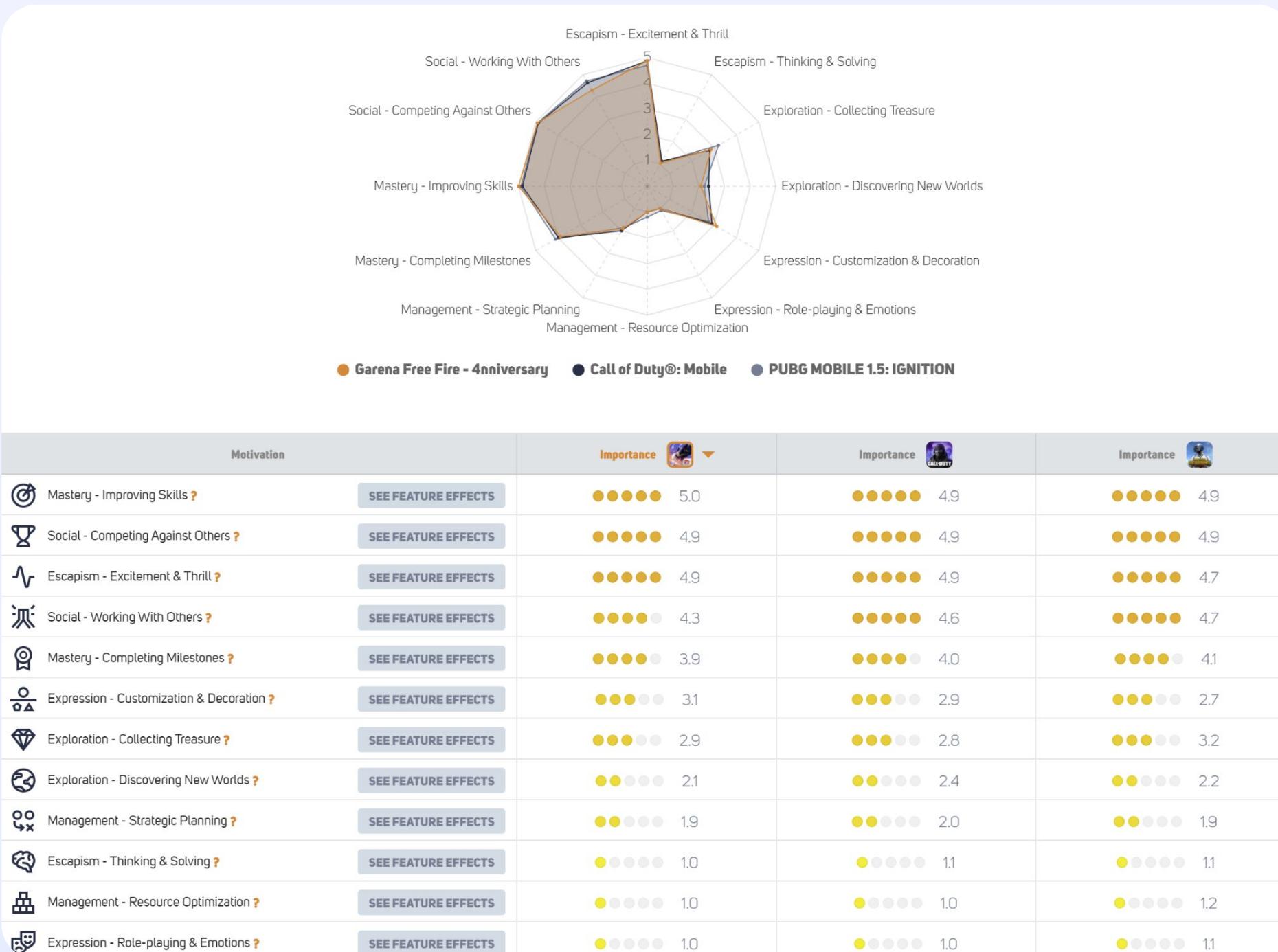
- GameRefinery uses a proprietary motivation model consisting of twelve different Motivational Drivers, each covering a separate player root motivation.
- These Motivational Drivers are also grouped based on their nature to form meaningful pairs or “motivational groups” - for example Improving skills and Completing Milestones fall under Mastery.
- Motivation results are based on a survey including over 7000 respondents. The survey was targeted towards mobile game players in English speaking western countries (US, UK, Canada, New Zealand and Australia). The sample is representative of the smartphone users when it comes to age, gender, income and household size.

	Social - Working With Others		Expression - Role-playing & Emotions
	Social - Competing Against Others		Expression - Customization & Decoration
	Mastery - Improving Skills		Exploration - Discovering New Worlds
	Mastery - Completing Milestones		Exploration - Collecting Treasure
	Management - Strategic Planning		Escapism - Thinking & Solving
	Management - Resource Optimization		Escapism - Excitement & Thrill



# Motivational Drivers of the top shooter games

Motivational drivers describe the main reasons players enjoy playing the game



As we can see, there aren't huge differences in motivational drivers for top shooters. The biggest differences being CoD and PUBG having slightly higher Social - Working with others through their fully fledged guild and co-op mechanics, compared to Free Fire's more simpler Guild approach. Also PUBG is able to tap a bit more into the Exploration - Collecting Treasure motivation with its showroom and season gallery collection systems.

It is interesting to see if the upcoming titles are able to differentiate in terms of different motivations e.g. the survival shooter Lost Light with Exploration - Discovering New Worlds, and bring new types of audience to the genre.



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Gacha Iap & Monetization

Live Events Appointment Mechanics

## 12 Player Motivations

