

GameRefinery
A Liftoff Company

The Rise of Midcore Mobile Games

Snapshot Report

July 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 must-have features that the top-grossing Midcore games have.



GameRefinery's Genre Taxonomy

The rise of midcore mobile games overview



Erno Kiiski
Chief Game Analyst

It used to be the case that the mobile gaming market was dominated by Casual and Hyper Casual titles such as *Candy Crush* and *Merge County*. While these and many other titles in the Casual and Hyper Casual market are still popular, the growing popularity of Midcore games such as *Diablo Immortal*, *Call of Duty: Mobile*, and *Apex Legends Mobile* is a sign that the mobile market is evolving and providing new experiences that cater toward the needs of PC and console gamers.

There are plenty of numbers backing this up. If we take a look at Midcore and Casual mobile games released in the past 365 days, nine Midcore titles still feature in the top-200 grossing chart (US), compared to just three Casual games.

That's not to say that Casual and Hyper Casual games are no longer popular, but the popularity of Midcore games shows that AAA developers and publishers from the world of major video games are starting to take the mobile market more seriously.

The vast majority of Midcore games are AAA experiences, many of which have been ported from best-selling PC and console franchises to mobile. Of course, many big names have experimented with mobile ports in the last decade with mixed results, but we're starting to see more consistency when it comes to quality now. What's impressive about many of these AAA Midcore games is that they retain the quality of their PC and console counterparts while adapting to the mobile market with specific gameplay and monetization features. In this Snapshot Report, we dive into what's setting them apart and the features making them so successful.



Key points



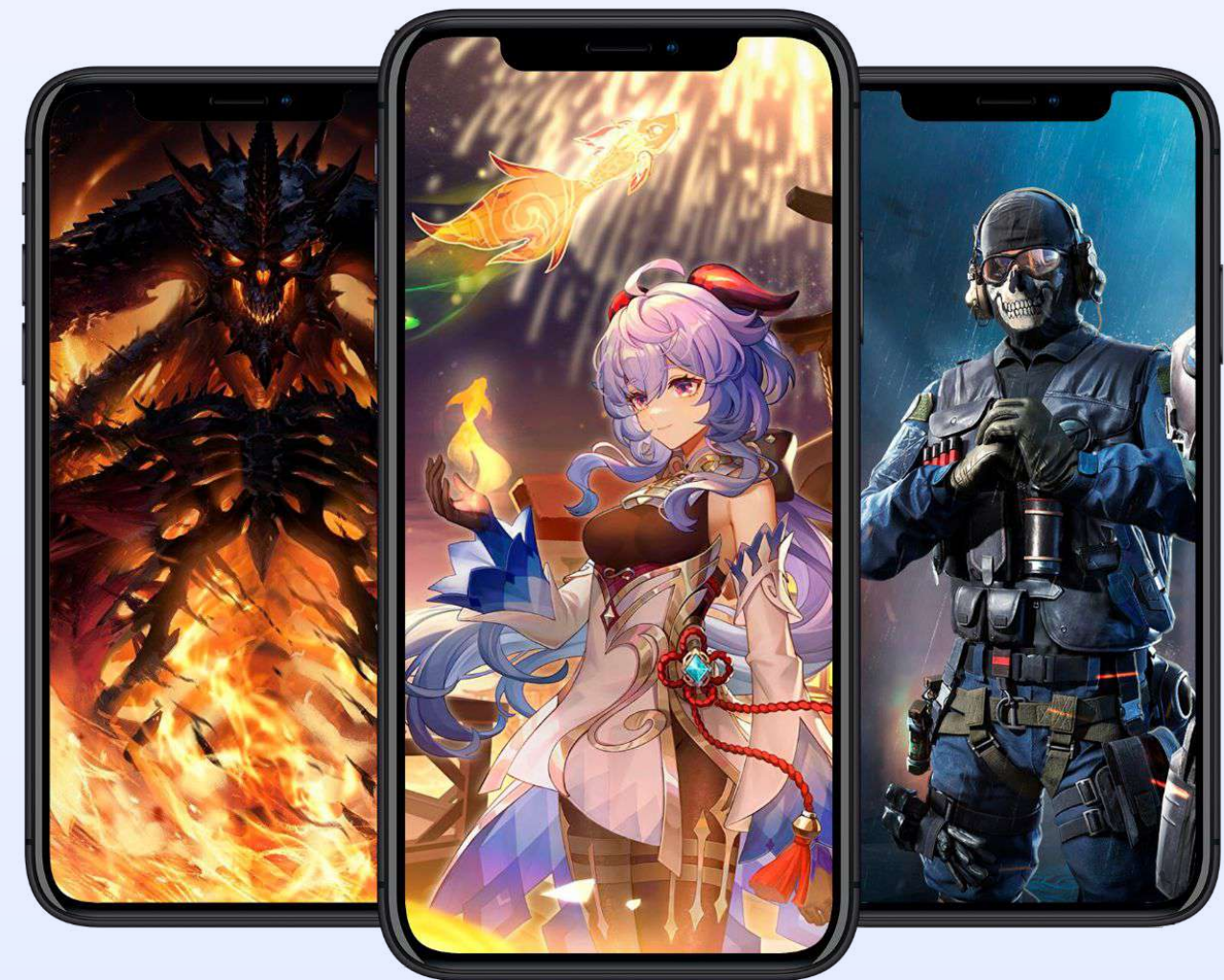
Erno Kiiski
Chief Game Analyst



- Nine Midcore mobile games that have been released in the past 365 days currently feature in the top-200 grossing chart (US), compared to just three Casual mobile games.
- The Midcore category's market share accounts for nearly 37% of US mobile game revenue (iOS), making it the only game category that has grown between Q1/2021 and Q1/2022.
- More intuitive control systems that allow for experiences similar to PC and console gaming differentiate top revenue-driving AAA Midcore games from other competition.
- Successful Midcore games distinguish with their multiple monetization streams, including gachas and new Battle Pass styles, to thrive in the competitive mobile market. For example, over 65% of the top Midcore games contain more than five different gachas.
- Top Midcore games offer a busy calendar of live events and content updates. For example, 80% of top Midcore games in the US combine events with their special event currency, which is an effective way to increase sinks in the game's economy temporarily.
- There's a new trend of Midcore games implementing external web stores to bypass in-app purchase fees.

Market











What does the Midcore mobile gaming market in the US currently look like?



Top games and their current market share within the Midcore category in US iOS

Key takeaway: The Midcore category's market share accounts for 36.73% of the US mobile game market revenues (iOS, Q1/2022), making it the only game category that has grown between Q1/2021 and Q1/2022 (by 1.55%). When we compare the market situation between Q1/2022 and Q1/2021 within Midcore games, the biggest market challenger is Supercell's **Clash Royale**, which managed to increase its market share by more than 4% a year. Moreover, compared to Q1/2021, **Lords Mobile: Tower Defense** and **Top War: Battle Game** have had to give up the top 10 positions as **Clash Royale** and 4X Strategy game **Evony** established their position in the top 10 by gaining more market share.

Mid-core

		2022 Q1					2022 Q1				
		Rev	Change	DL	Change		Rev	Change	DL	Change	
	1. Genshin Impact COGNOSPHERE PTE. LTD. Action RPG	7.74%	+3.2	2.63%	-1.56		6. PUBG MOBILE Tencent Mobile International Limited Battle Royale	4.19%	-0.11	3.72%	-0.79
	2. Clash Royale Supercell Tactical Battler	5.8%	+4.06	7.95%	+5.31		7. Rise of Kingdoms Lilith Games 4X Strategy	3.44%	+1.09	5.47%	+4.32
	3. Garena Free Fire: Rampage GARENA INTERNATIONAL I PRIVATE LIMITED Battle Royale	5.46%	+1.67	1.24%	-1.17		8. State of Survival: Zombie War FunPlus International AG 4X Strategy	3.22%	-0.15	3.2%	-1.27
	4. Clash of Clans Supercell Build & Battle	5.32%	+1.23	3.38%	+0.29		9. Evony TOP GAMES INC. 4X Strategy	3.15%	+1.42	3.89%	+2.09
	5. Call of Duty®: Mobile Activision Publishing, Inc. Classic FPS/TPS	5.05%	+0.75	12.93%	+1.19		10. DRAGON BALL Z DOKKAN BATTLE Bandai Namco Entertainment Inc. Puzzle RPG	3.09%	+0.86	0%	

Numbers are from iOS games, US market. (Source: GameRefinery SaaS platform)

Midcore market (US) in the past year - what has happened?

Key takeaway: Below, we take a look at the **Midcore** and **Casual** games (which have always been considered more appealing to large audiences in the US) released in the past 365 days which have sustained their position in the top-grossing 200. It's interesting to see only **three Casual games** compared to **nine Midcore games**. Next, we'll take a look at what the new top challengers in the Midcore category look like.



The top three Midcore superhits in the past six months:

Diablo Immortal



Diablo Immortal

Analyst's Overview

Our analyst's key takeouts

Genre & Style

Diablo Immortal is a cross-platform MMORPG, set between the events of the massively popular PC RPGs Diablo II and Diablo III. The game feels similar to especially Diablo III, and manages to capture the original theme and feel extremely well through smooth gameplay, immersive story and top quality audiovisuals full of gore.

Features & Progression

- Core gameplay consists of **action RPG combat**, immersive **story quests and lore**, and **exploring the open world zones**
 - Various PvE modes and content:
 - **Solo and co-op Dungeons**, **Challenge Rift**, **Helliquary co-op Raids**, **world bosses**

[Read the full overview in the GameRefinery service →](#)

Special notes from the analyst

- The fast-paced action RPG controls are ported extremely well to mobile, and the gameplay is smooth and fluid.
- Playing the main storyline is comparable to a compelling quality PC/Console single-player RPG. Monetization isn't pushed too hard until the endgame.
- The game utilizes interesting ways of storytelling while introducing different game features such as factions, game modes, and progression mechanics.



The top three Midcore superhits in the past six months:

Dislyte



Dislyte

Analyst's Overview

Our analyst's key takeouts

Genre & Style

Dislyte is a turn-based RPG with a mixture of (street) fashion, hiphop music and mythical gods as it's defining theme in designs. The battles are spiced up with occasionally shown cutscenes when strongest attacks are used. The core progression comes through standard Turn-based RPG core but as an added twist there is also a Rhythm game mode befitting to the thematics of the game.

Visually the game has one of the most gorgeous characters on mobile. Each character has fashionable looks inspired by their corresponding deity. Music is the central theme of the game and it is recommended to play the game with headphones on.

Features & Progression

Game Modes:

Standard Turn-based RPG, Rhythm game mode, and a special event mode.

[Read the full overview in the GameRefinery service →](#)

Special notes from the analyst

- Promoting (raising the max level for) a certain element character for the first time to the max triggers a five-day login bonus. Moreover, subsequent max promotions of that element give a one-off reward.
- Multi-battles allow the player to start up to 10 battles of auto-battle, during which the player can leave it in the background and continue playing other parts of the game freely.

The top three Midcore superhits in the past six months:

Apex Legends Mobile



Apex Legends Mobile

Analyst's Overview

Our analyst's key takeouts

Genre & Style

This is a mobile version of the super popular PC/console **hero-based Battle Royale- shooter** Apex Legends. It has a lot of the same maps, same legends, same weapons and so on, but it is a separate product with no cross-platform play possibility and it's own live operations.

Features & Progression

- Biggest differentiator from the rest of the mobile Battle Royale-games is that in this game you have play each match with specific **Legend** (characters with their own skill-set)
- One key game mechanic differentiator between the original PC/console- version and this mobile-port is that **each Legend has a mastery level** which is upgraded by playing with the character (not monetized)

• By **unlocking the mastery level** you get different passive skills to give small benefits but the

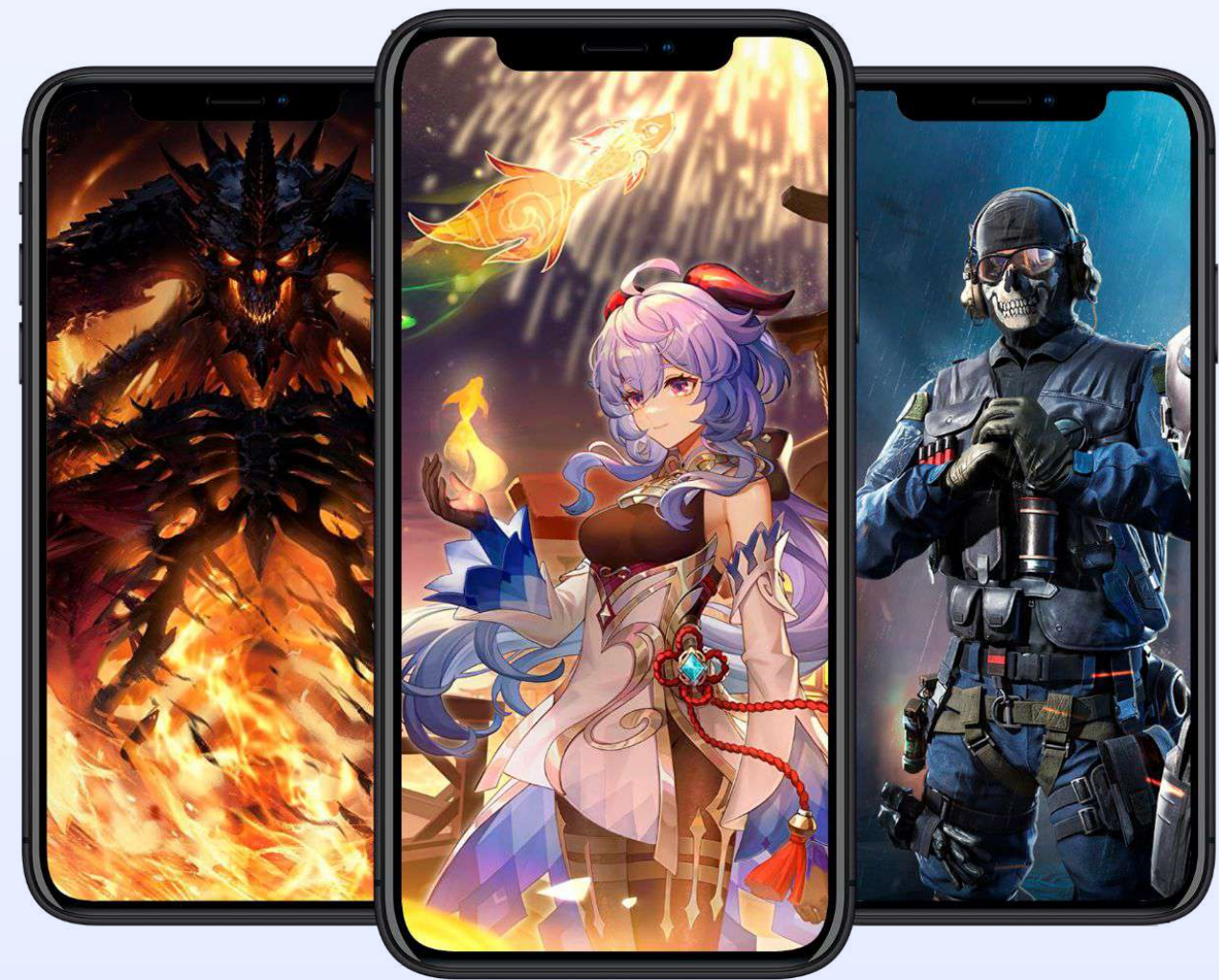
[Read the full overview in the GameRefinery service →](#)

Special note from the analyst

- Having played hundreds of hours of the original PC/console Apex Legends, it really impressed me how well Respawn has managed to capture the feeling of the original's gameplay in mobile devices.

2022 is a big year for AAA midcore mobile games

AAA mobile games are dominating the midcore mobile market, but what are the essential features that are helping AAA Midcore games succeed?



Essential design features that help AAA midcore games succeed on mobile

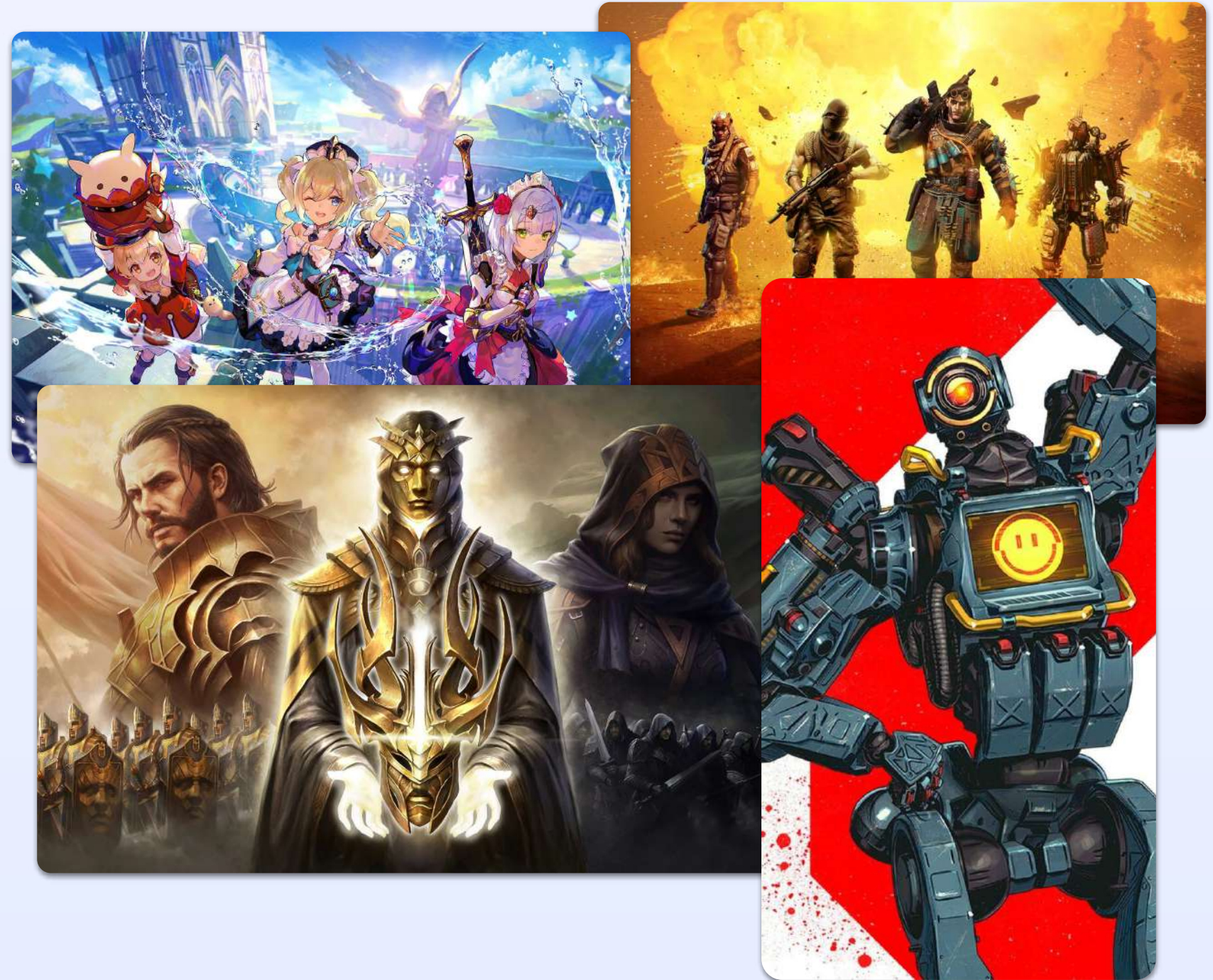


Erno Kiiski
Chief Game Analyst

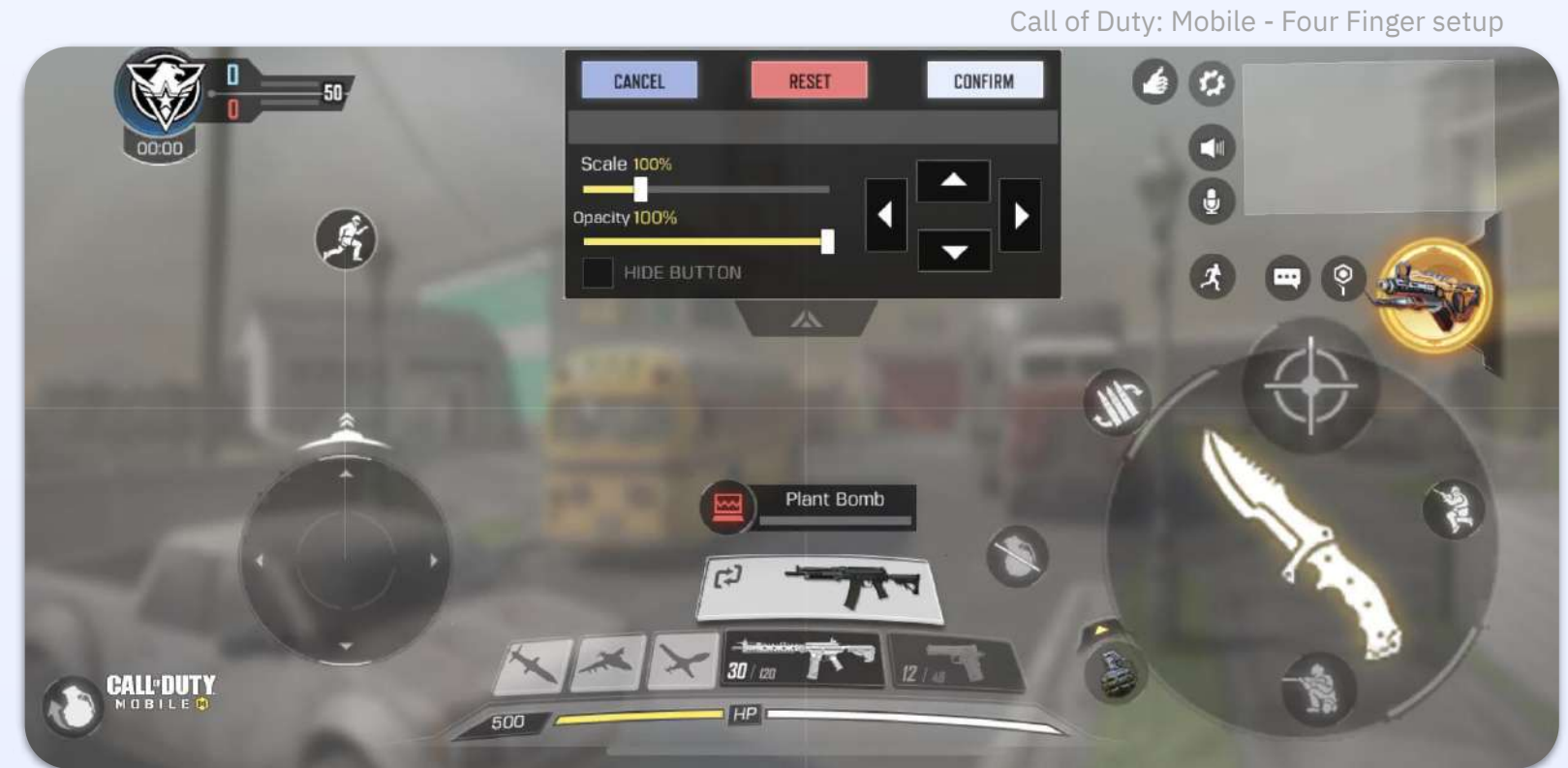
At the end of last year, we asked if 2022 would be THE year for AAA in mobile. It's certainly been a jam-packed year so far, with new mobile games offering spectacular gameplay experiences for the players.

But for many developers and publishers, transitioning big IP to mobile can be a challenge. From control methods to monetization and the weight of consumer expectation, the deck is often stacked against titles that try to make this shift.

From a game design perspective, we share the features that are contributing to the success of AAA midcore games. Of course, not every developer has the same resources of AAA development teams, but being aware of the features they're using is valuable knowledge for smaller-scale developers.



AAA Midcore mobile games: Essential design features



#1 Controls and gameplay

Let's start with the basics, meaning the feel of the game. Moving from a complex controller and mouse/keyboard setup to a mobile screen is a massive hurdle. Games such as *Call of Duty: Mobile*, *Genshin Impact*, and most recently, *Diablo Immortal*, have managed to crack this to emulate precision and control, delivering an experience more akin to what mobile (and console) gamers expect from AAA premium games.

Looking at GameRefinery's player motivations data, we can see that the typical Midcore players are motivated by the excitement and thrill of the adrenaline rush from acquiring and mastering the reaction-based skills that, for example, multi-touch controls typically require.

AAA Midcore mobile games: Controls and gameplay



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Chief Game Analyst

Regarding control mechanics, it's also interesting to see that the two top Midcore games by revenue in the US market, *Genshin Impact* and *Diablo Immortal*, are two of the few Action RPGs/MMORPGs where **aiming is a core part of the game mechanics**.

For example, *Genshin Impact*'s control/feel of the game is much closer to a AAA premium console game when compared to most other mobile Action RPGs.



Aiming is
important part of
the core gameplay

● Yes ● No

Sort by Revenue Past 30 Days				Sustained Ranks	
				Grossing Rank	Download Rank
	Genshin Impact COGNOSPHERE PTE. ...	Action RPG	●	19	180
	Diablo Immortal Blizzard Entertainment...	MMORPG	●	8	9
	Ni no Kuni: Cross W... Netmarble Corporation	MMORPG	●	141	423
	Disney Mirrorverse Kabam Games, Inc.	Action RPG	●	74	6
	Honkai Impact 3rd miHoYo Limited	Action RPG	●	1000+	1000+
	MARVEL Future Fight Netmarble Corporation	Action RPG	●	1000+	1000+



Diablo Immortal



Genshin Impact

AAA Midcore mobile games: Controls and gameplay













Erno Kiiski
Chief Game Analyst

What also differentiates *Genshin Impact* and *Diablo Immortal* from typical RPGs is that they are much **more focused on core gameplay** so that combat, story, exploration, and quests are more involving compared to, for example, usual Action RPGs where autoplay is commonly used to grind resources for the progression in the meta (character upgrades, etc.).

The game has
triggerable
autoplay

● Yes ● No

Sort by Revenue Past 30 Days				Sustained Ranks	
				Grossing Rank	Download Rank
	Genshin Impact COGNOSPHERE PTE. ...	Action RPG	●	19	180
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	MARVEL Future Fight Netmarble Corporation	Action RPG	●	1000+	1000+
	Azur Lane YOSTAR LIMITED	Action RPG	●	1000+	1000+
	MHA: The Strongest... Crunchyroll Games, LLC	Action RPG	●	1000+	1000+
	MARVEL Future Re... Netmarble Corporation	MMORPG	●	1000+	1000+
	MapleStory M: Fant... NEXON Company	MMORPG	●	1000+	1000+

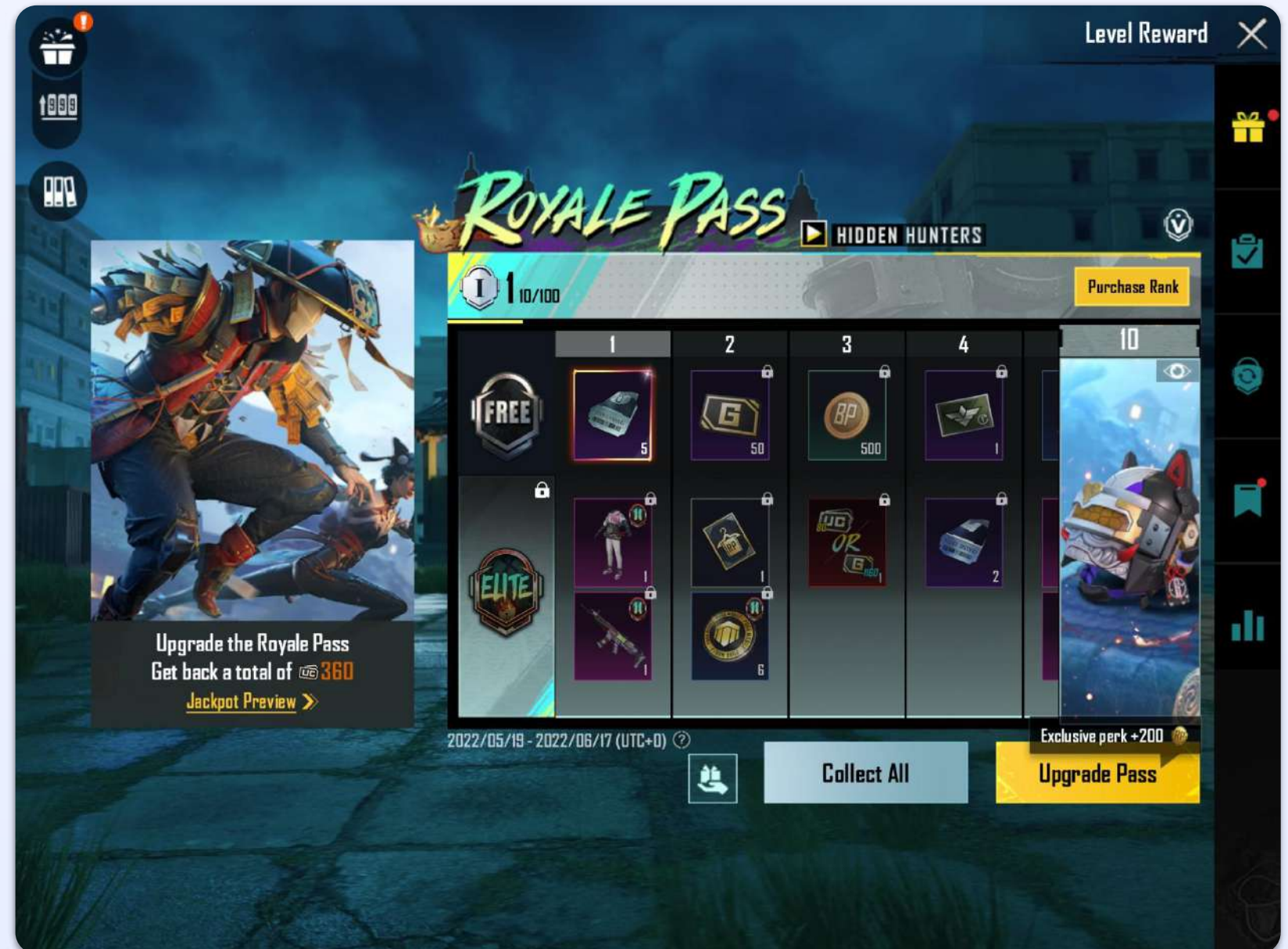
Source: GameRefinery SaaS platform

AAA Midcore mobile games: Essential design features

#2 Multiple monetization routes

While a healthy player engagement keeps the blood in your game circulating, it is monetization that provides the oxygen that games need to survive. Multiple monetization routes through Battle Pass, direct purchase bundles, and gachas help ensure your game is a commercial success.

Our [recent report](#) provides valuable insights into innovative monetization feature implementations, covering the ever-evolving Battle Pass to new types of gachas and the latest developments in IAP offers, but what are the must-have monetization features that the top-grossing games have? Let's take a look!

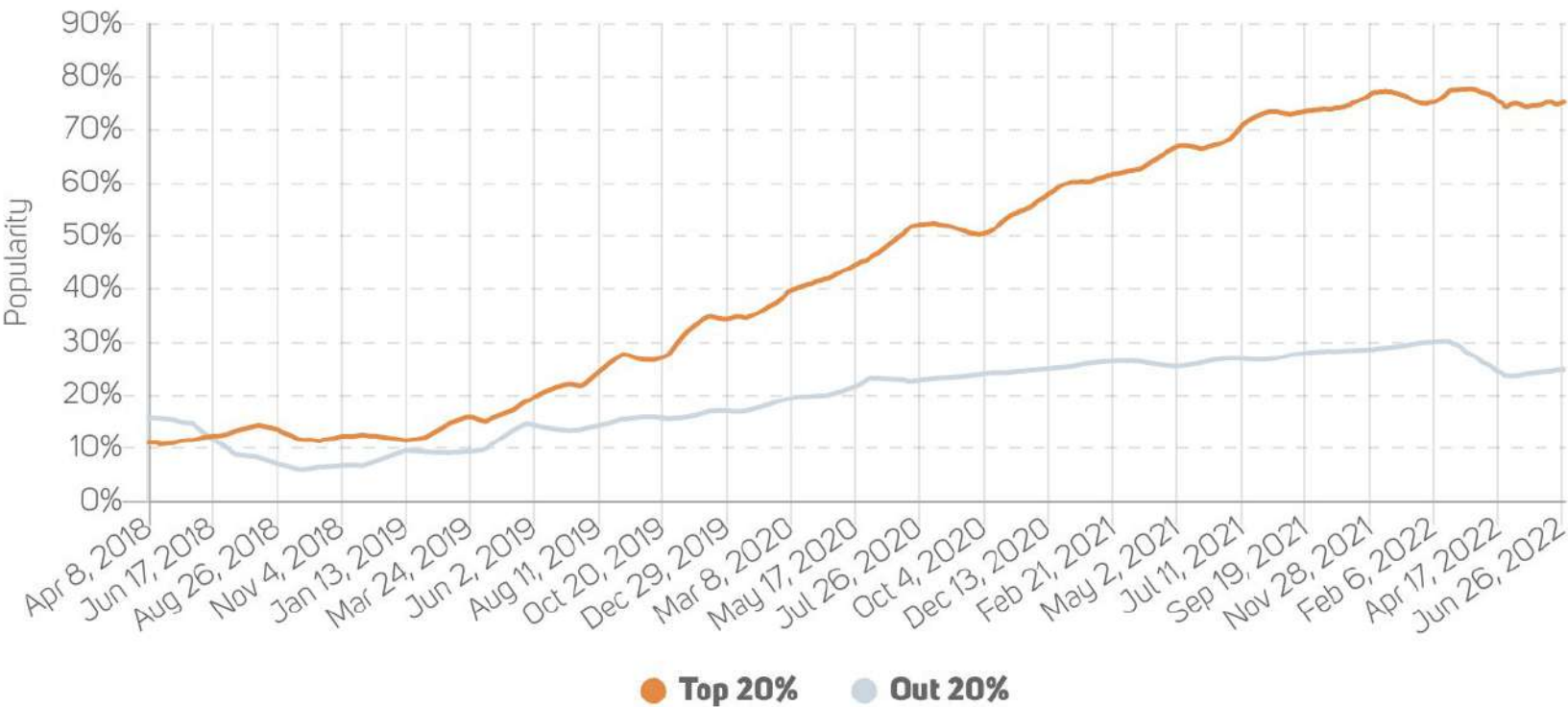


PUBG: MOBILE - Royale Pass

AAA Midcore mobile games: Multiple monetization routes

Source: GameRefinery SaaS platform

The popularity of Battle Pass plan among Midcore games



Erno Kiiski
Chief Game Analyst

We've written extensively about the growth of the Battle Pass and how it's being used by some of the biggest games on mobile, so it's no surprise that more than a third of the top 20% of Midcore games contain a Battle Pass Plan.

However, what is surprising is the feature's degree of adoption between top Midcore games and Midcore games outside of the top 20%, making the Battle Pass plan a clear differentiating feature between best-performing games and others.

75% of the US (iOS) top 20% grossing Midcore mobile games utilize the Battle Pass feature, while only 25% of games outside the top 20% have it. (Source: GameRefinery SaaS platform)

AAA Midcore mobile games: Multiple monetization routes



PUBG MOBILE - Royale Pass EZ Mission License

Innovative developers can also find ways to create multiple monetization routes within a single feature. *PUBG MOBILE*'s RP EZ Mission License is an extra purchase on top of players' premium battle pass purchase. It unlocks weekly missions for the player faster, letting them earn weekly Mission Cards (used to auto-complete tasks) which rewards the player with more RP (battle pass progression points) from Season Match Time rewards.

But the interesting thing here is the pricing. It varies based on how many consecutive seasons of the BP the player has purchased. If they have purchased more than three consecutive BPs, they get the EZ Mission License for free. So, its primary function is to drive the constant consecutive BP purchases and keep players' "purchase streak going."



Source: GameRefinery SaaS platform

AAA Midcore mobile games: Multiple monetization routes

The popularity of gacha mechanics among Midcore games (US, iOS)

	Overall Popularity	Top 20% Popularity	Top 20% Difference
Limited-time gacha	<div><div></div></div> 48%	<div><div></div></div> 76%	+28
Number of gachas: 5+	<div><div></div></div> 53%	<div><div></div></div> 63%	+10
Special gacha mechanics	<div><div></div></div> 19%	<div><div></div></div> 30%	+11

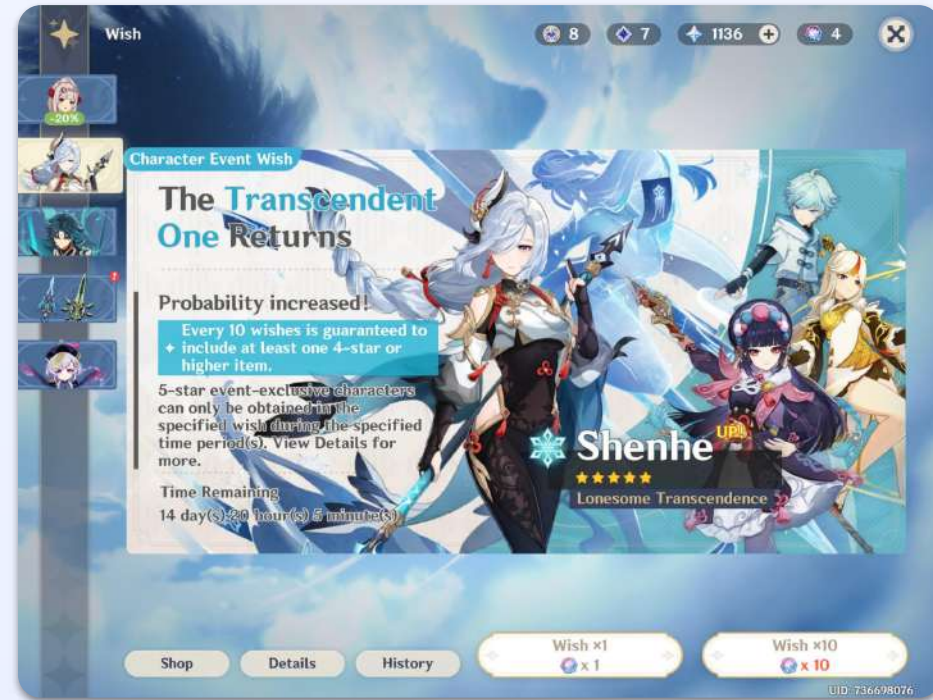


Source: GameRefinery SaaS platform

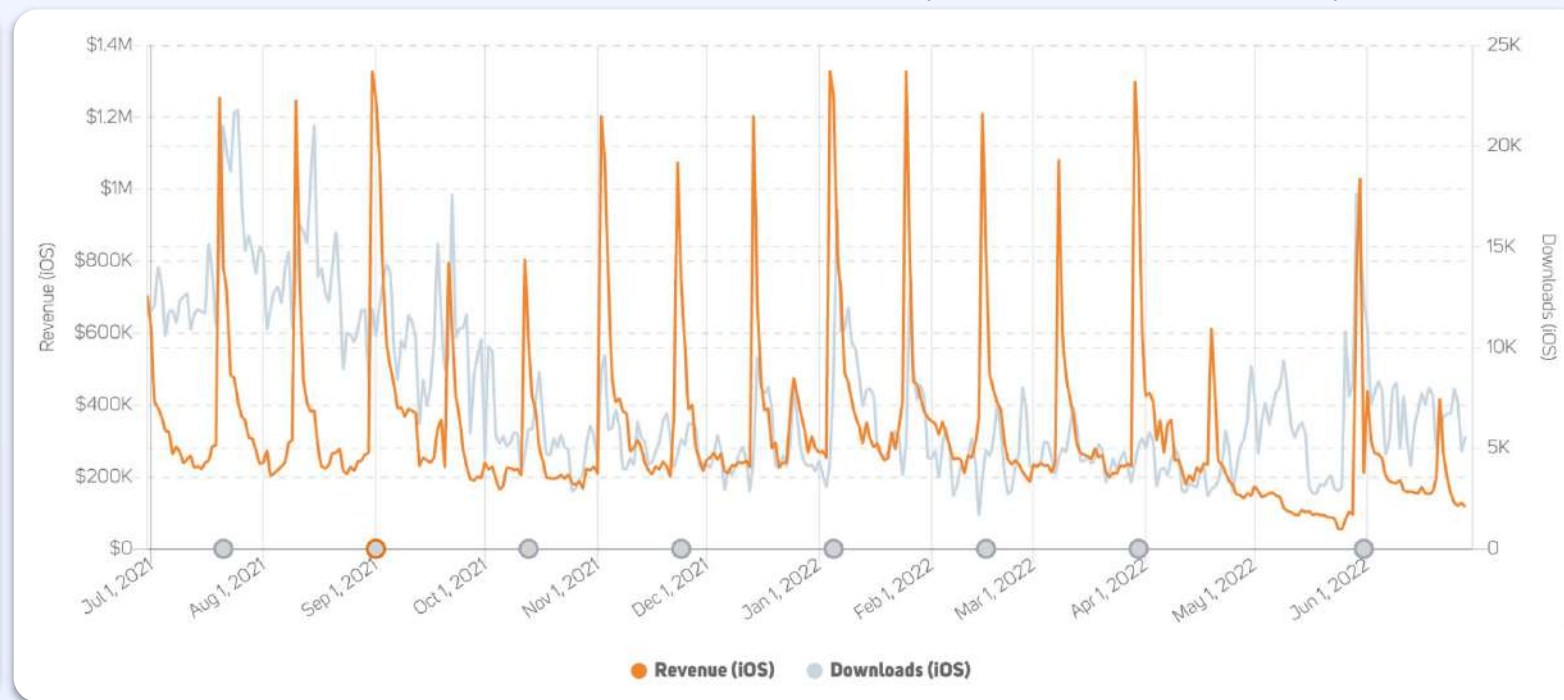
The gacha system is one of the most effective ways developers can monetize their mobile games, which is why they are currently dominating the mobile game market and can be found in even the biggest IPs. 76% of the US top 20% Midcore games use limited-time gachas, and over half of the top Midcore games contain more than five different gachas.

Interestingly, even though the growing popularity of gachas has made them evolve and we've seen several innovative implementations of gacha mechanics, special gacha mechanics are still not that common among top Midcore games in the US. Only 30% of the US's top 20% of Midcore games utilize them. Special gacha mechanics include gachas such as *Box Gacha*, where each pull removes the earned item from the reward pool, so each consecutive pull increases the chances for the rarest items (often the price also goes up for consecutive pulls) or in-gacha stores, where you accumulate gacha-specific currency for each pull, which is used at its own store (also a way to build pity mechanic and give player agency to choose their rewards for pulling multiple times).

AAA Midcore mobile games: Multiple monetization routes



Genshin Impact's revenue and downloads past 12 months



Genshin Impact - Limited-time gachas

In *Genshin Impact*, characters are introduced with high-quality storylines/missions that are often tied to various events. Players can purchase these characters from the limited-time banner gacha, the main monetization mechanic in the game.

Despite the game's daily baseline revenue being relatively high, every new gacha release creates a massive spike in the baseline revenues, as seen in the iOS graph above from the past 12 months.



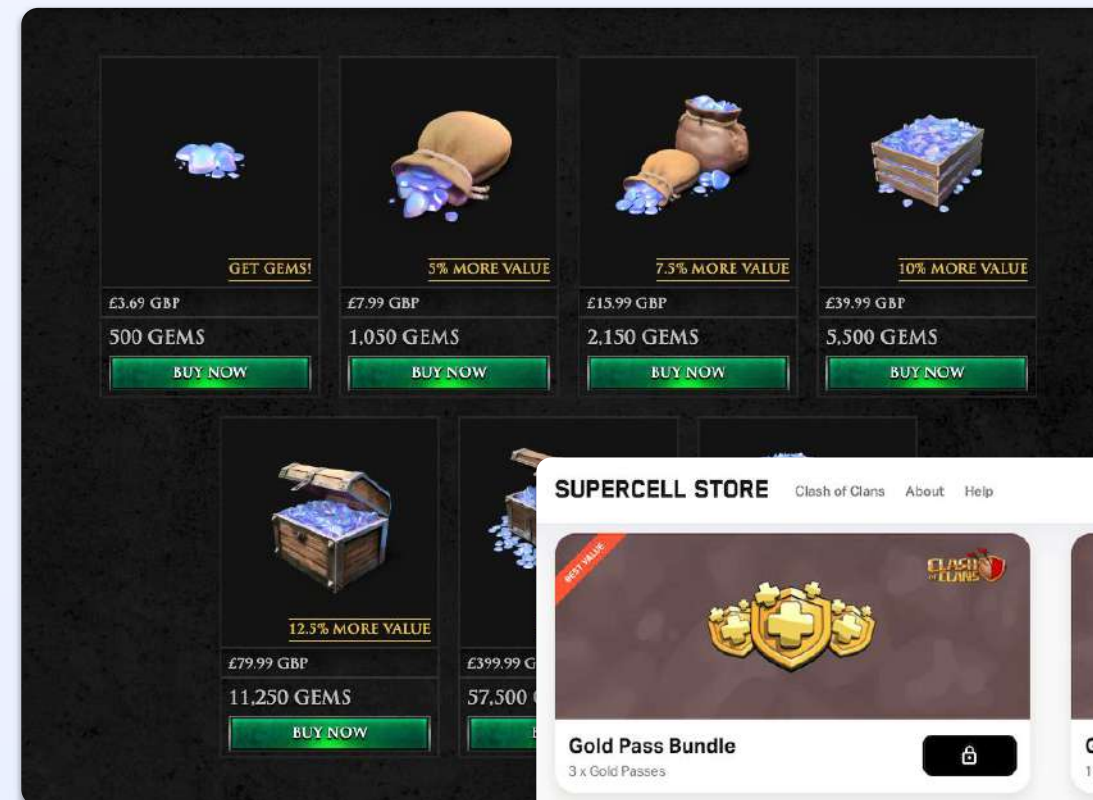
Trend spotlight: External web stores for selling in-game items

One interesting trend we're currently seeing, especially among Midcore games, is **mobile game publishers' external web stores for selling certain in-game items to bypass Google and Apple store cuts**. At the time of writing, we've spotted a few mobile games doing this so far, for example: *Game of Thrones: Conquest*, *Clash of Clans*, *Marvel Strike Force*, and *Star Trek Fleet Command*.

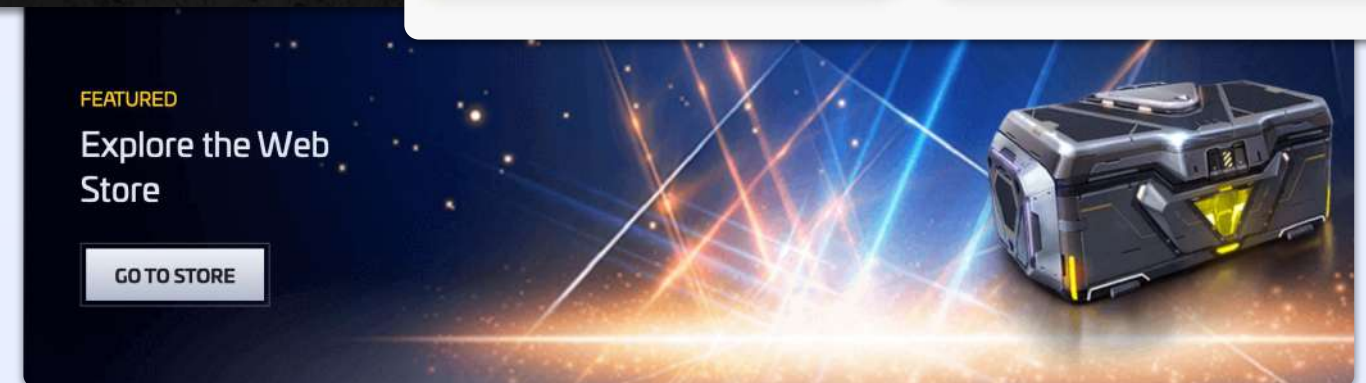
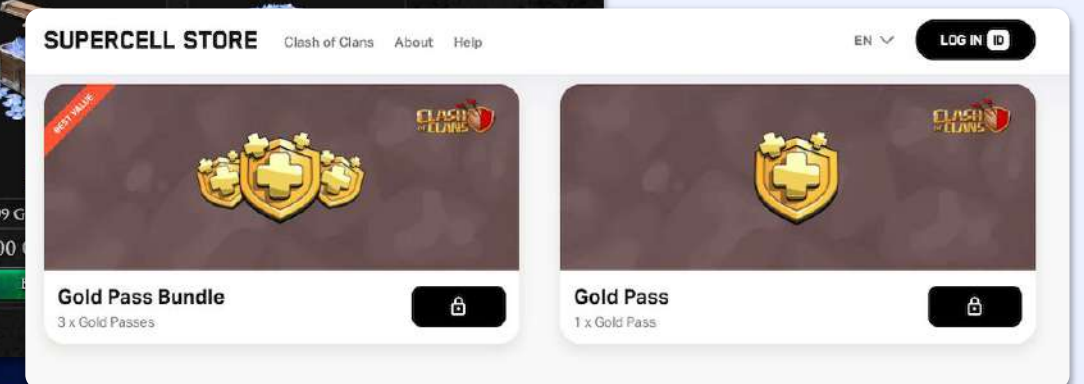
So what's the deal with these web stores? Most mobile games are free-to-play titles and make most of their revenue through in-app purchases such as in-game currencies, battle pass subscriptions, or cosmetic items. Given that many of the most popular mobile games make upwards of \$100k every single day, it's no surprise that studios are looking to move some of their in-app purchases to external channels where Google and Apple can't take a cut.

What remains to be seen is how many publishers will follow in the footsteps of these games by setting up their own web stores. What remains an issue is the visibility and accessibility of these web stores. Apple and Google don't allow the advertising of these web stores in-app, so mobile game publishers are currently dealing with the challenge of getting the word out there about these web stores.

Game of Thrones: Conquest web store



Supercell store for Clash of Clans



Star Trek Fleet Command web store

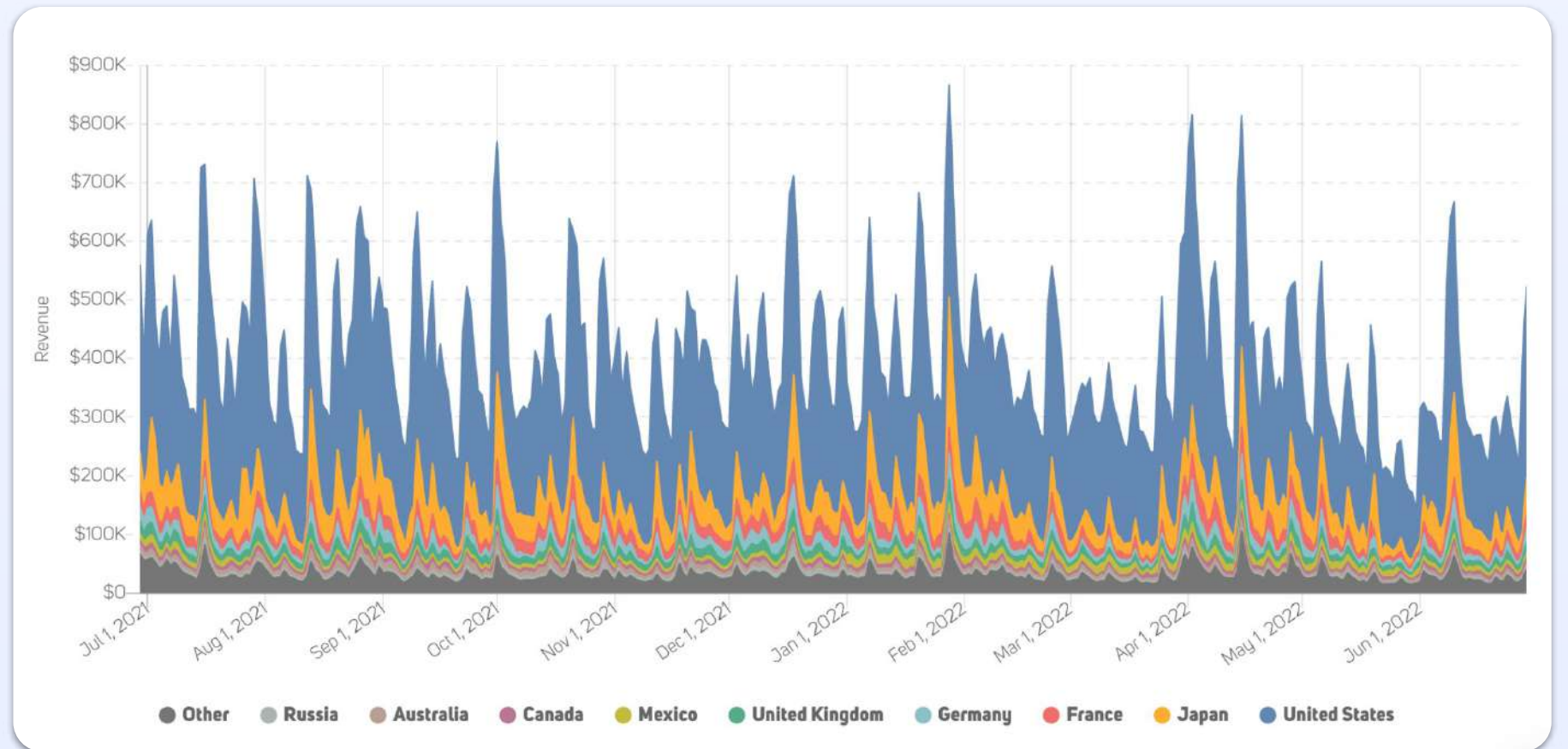
AAA Midcore mobile games: Essential design features

#3 Massive content cadence

Another lesson to learn from the most successful mobile games is that they offer players multiple gameplay events, limited-time game modes, and numerous new maps, characters, and weapons to keep players engaged.

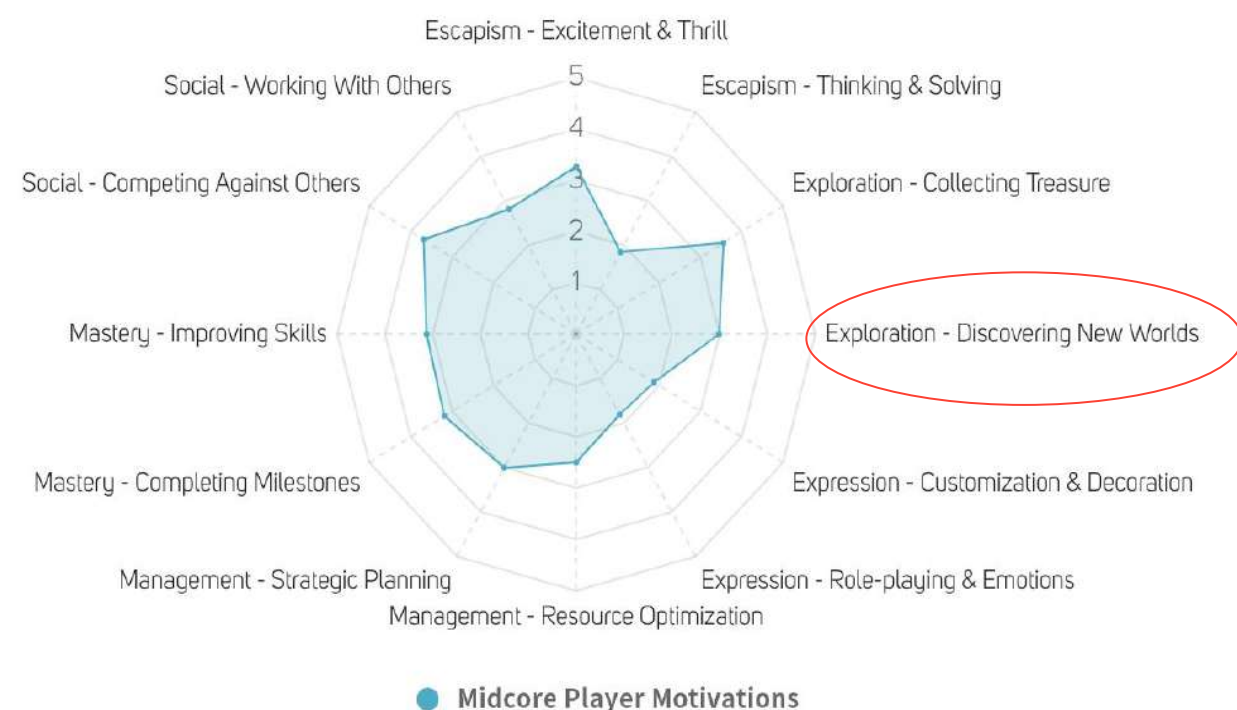
Successful mobile games know how to leverage events. Take *COD: Mobile*, for example – there are always two to three smaller events tied to various limited-time modes/new maps on the go that require gameplay to unlock multiple cosmetics. This is complemented with bigger gameplay events at least once a month. In addition to the events, COD brings tons of purchasable content on high cadence through gachas, direct purchases and Battle Pass.

Offering variety and choice also supports a workable cosmetic economy. Not everyone wants to buy the same cosmetics, so top games present new (and available only limited-time) items on a very regular basis.



Call of Duty: Mobile's revenue spikes in the last 12 months show the importance of events and limited-time items. (Source: GameRefinery SaaS platform)

AAA Midcore mobile games: Massive content cadence



The popularity of in-game events and related features among Midcore games (US, iOS)

	Overall Popularity	Top 20% Popularity	Top 20% Difference
Live events - Recurring	85%	100%	+15
Special rewards from live events	78%	98%	+20
Live events - Non-recurring	83%	96%	+13
Special live event currency/materials	50%	80%	+30
Promotional collaboration events	21%	44%	+23
Event-bound versions of characters	10%	18%	+8

Midcore gamers crave novelty, which is why making sure that there's always something new for players to discover is one of the best ways to retain players. **Especially limited-time in-game events provide a way to offer players new event modes, characters, event areas, and quests to keep them super engaged.**

80% of top Midcore games in the US combine events with their own special live event currency, which is an effective way to increase sinks in the game's economy temporarily. Live event currencies can be combined easily with limited-time shops, gachas, and content to create a boost to your game's economy. By rewarding players with some of this unique currency within the promotional period for something such as daily logins, you can be sure that players will keep coming back for more.



Erno Kiiski
Chief Game Analyst

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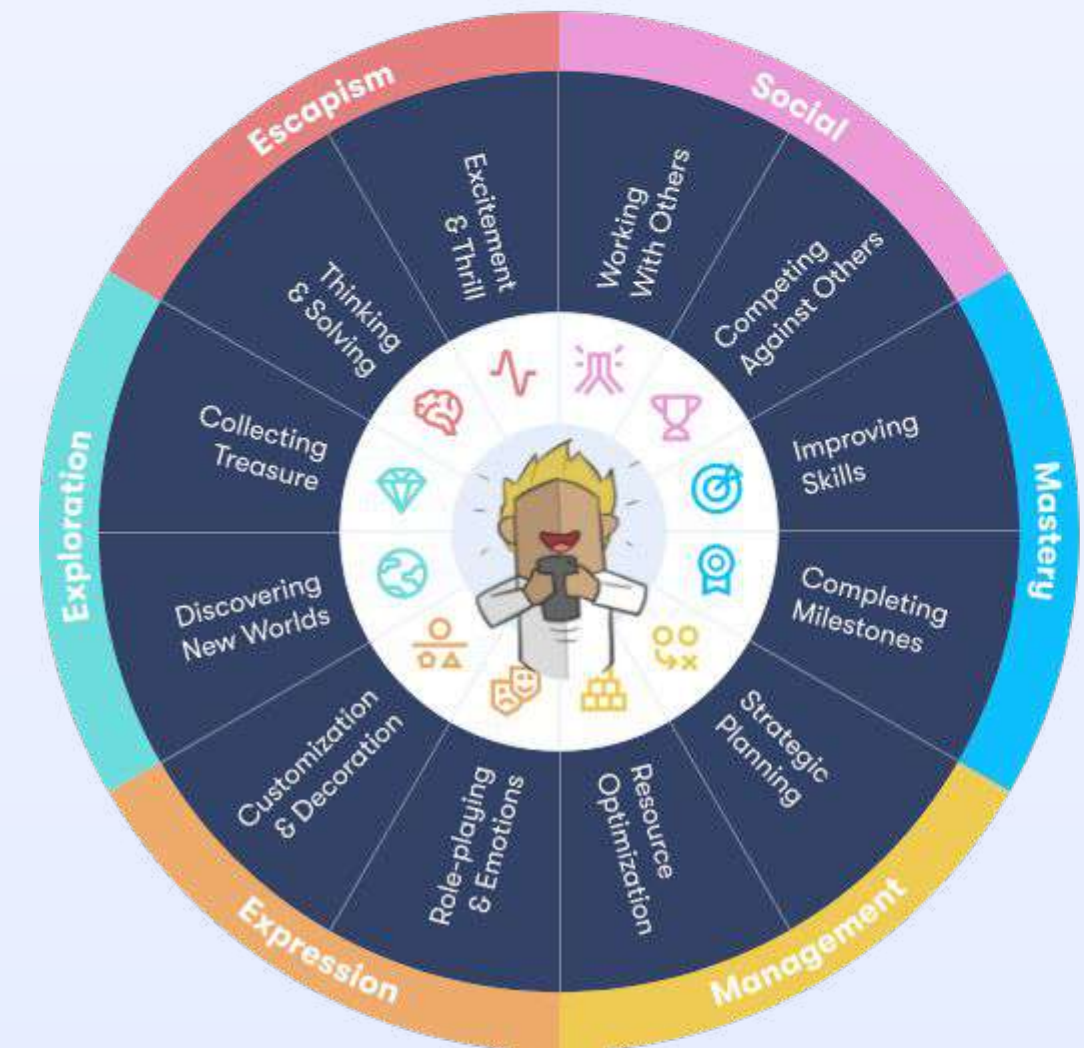
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We Know Mobile Games

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

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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