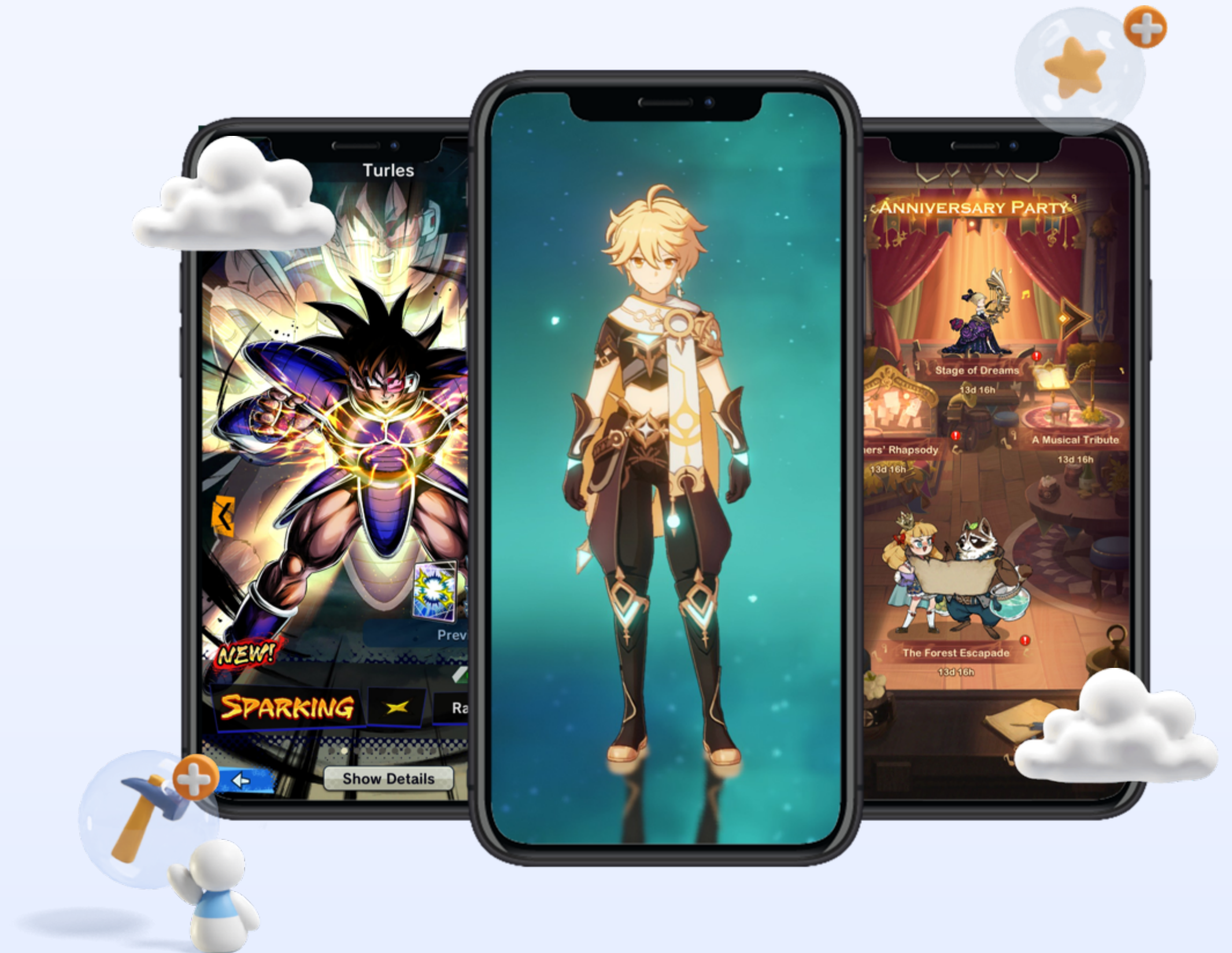


GameRefinery
By Vungle

RPG Genre Snapshot

June 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 **RPG genre under Mid-core**



GameRefinery's Genre Taxonomy

Short Match3 Genre Overview



Erno Kiiski

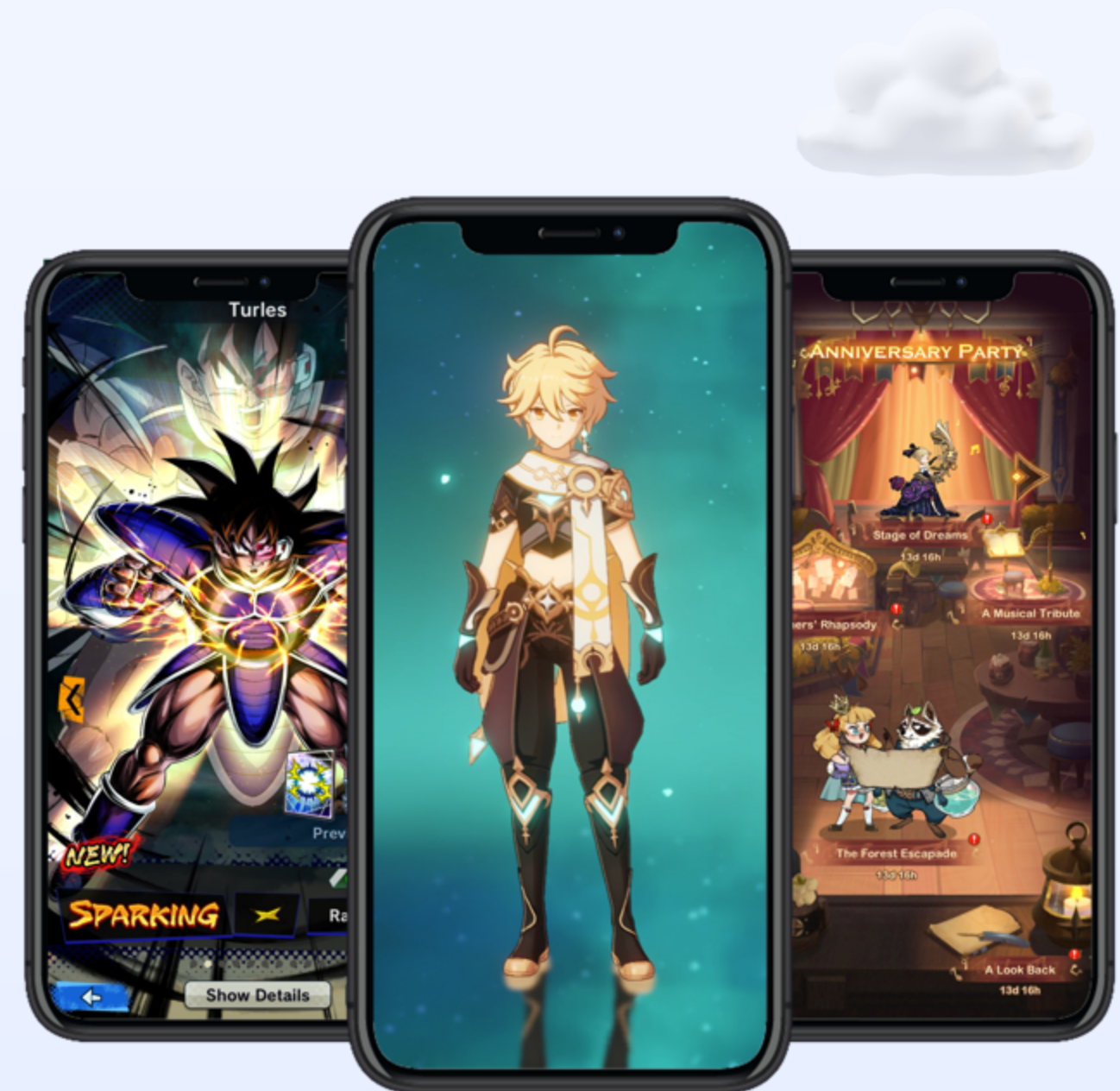
Chief Game Analyst - US

RPGs are a staple of gaming stemming from the very first text-based adventures. On mobile, they remain one of the largest genres with around 14% market share (US iOS).

Over the past year, we haven't seen any major shakeups. Hits like Raid: Shadow Legends, Dragon Ball Z Dokkan Battle, and Marvel Strike Force continue to top the charts. But compared to our previous RPG snapshot in Q1 2020, we're starting to see a shift in the types of new RPGs that are dominating the charts.

Whereas before the titles that caught our attention were almost without exception Turn-based RPGs, the past year has been characterized by action RPGs. We're, of course, talking about the jaw-dropping performance of Genshin Impact that on its own accounts for 10% of the RPG market share and, more recently, the success of MHA: The Strongest Hero.

Both games are characterized by their strong focus on narrative and story elements, open-world elements along with their high production values, particularly in the case of Genshin Impact that brought PC/console-level production rarely seen on mobile. However, they also have some differences. Genshin Impact is excelling in providing a single-player role-playing experience with a vast world to explore, while MHA also has competitive elements as a key part of the experience.



Key points



Erno Kiiski
Chief Game Analyst - US



- Currently, RPGs are the 4th largest genre in the US iOS market, contributing about 14% of the market's revenues.
- Overall, no major shakeups in the top RPG games aside from Genshin Impact that dominates the charts with over 10% of RPG market share and in a league of its own. MHA: The Strongest Hero was released in Q2 2021 (so not yet visible in Q1 charts)
- This past 12 months has seen two very successful RPG launches, Genshin Impact and MHA. What's interesting about both of these games is their strong focus on open-world experiences with narrative and story elements along with their high production values, particularly in the case of Genshin Impact that brought PC/console-level production rarely seen on mobile.
- With the success of Genshin Impact and MHA, we're starting to see a shift where Action RPGs are starting to gain FINALLY more ground on the western markets also. In our previous RPG snapshot, Turn-based RPGs were still giving other games in the genre a run for their money in the US market, and Action RPGs were making only a fraction of the revenues
- The most successful RPG updates naturally revolve around live events where new characters are added to the games. Collaboration events have also been successfully utilized in various games.











Market

- Top games and their market share



Top games and their current market share within the **RPG** genre in US iOS

Key takeaway: Overall, no major shakeups in the top RPG games aside from the obvious Genshin Impact dominating the charts with over 10% of RPG market share and in a league of its own. This also marks a shift where action RPGs are starting to gain more ground, also enforced by the recent success of MHA: The Strongest Hero (another action RPG hitting the very top of grossing charts in the US, released in Q2 2021, so not visible here). In our previous RPG snapshot, Turn-based RPGs were still giving other games in the genre a run for their money, and Action RPGs were making only a tiny fraction of the revenues in the US market

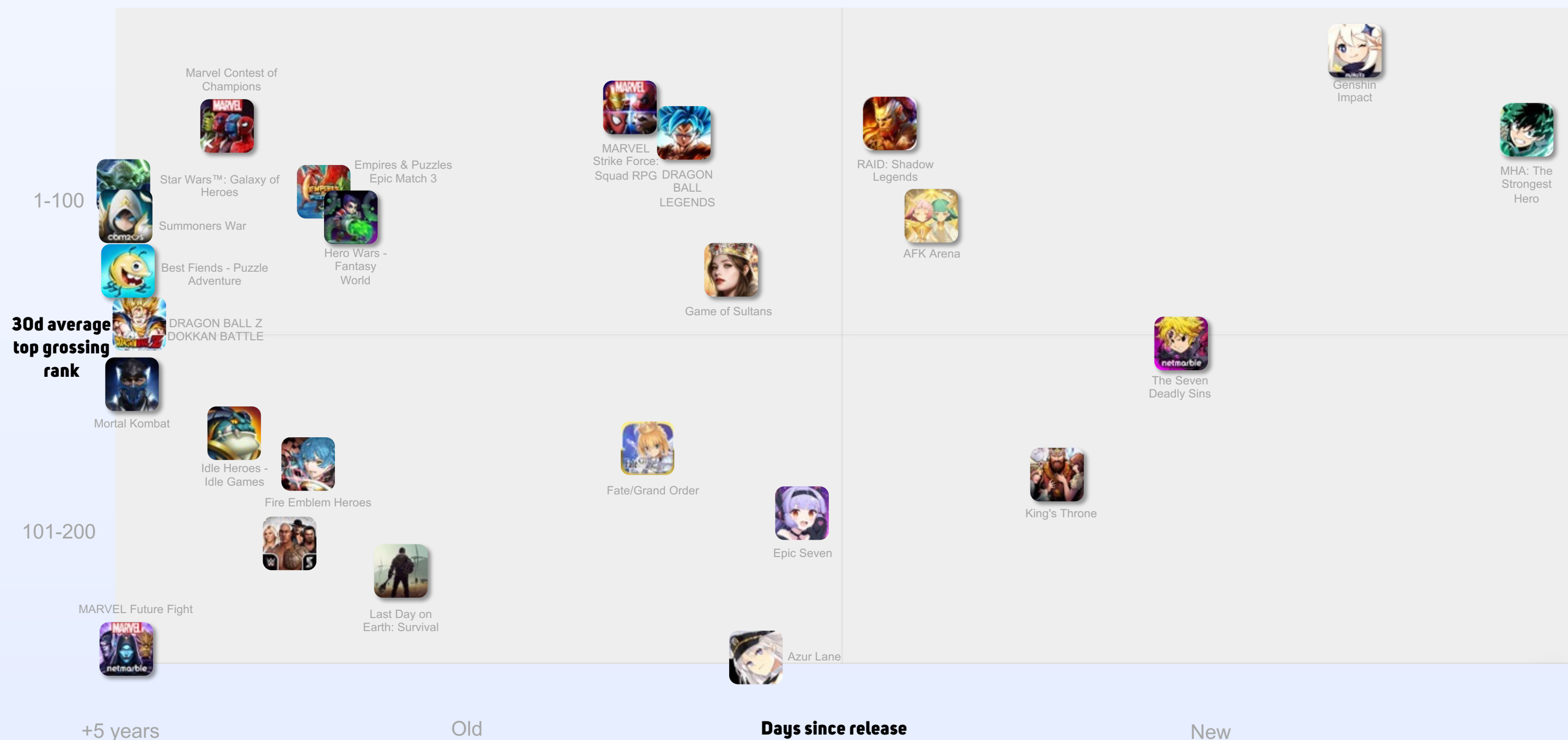
RPG		2021 Q1			
		Rev	Change	DL	Change
	1. Genshin Impact miHoYo Limited Action RPG	11.39%	+11.39	21.72%	+21.72
	2. DRAGON BALL Z DOKKAN BATTLE BANDAI NAMCO Entertainment Inc. Puzzle RPG	5.6%	-0.41	0%	
	3. MARVEL Strike Force: Squad RPG Scopely Turn-based RPG	5.38%	-0.08	0%	
	4. RAID: Shadow Legends Plarium Global Ltd Turn-based RPG	5.31%	-1	6.35%	-3.01
	5. Marvel Contest of Champions Kabam Games, Inc. Fighting	4.5%	-2.04	0%	-4.57
	6. DRAGON BALL LEGENDS BANDAI NAMCO Entertainment Inc. Fighting	4.31%	+0.91	6.16%	+6.16
	7. The Seven Deadly Sins Netmarble Corporation Turn-based RPG	4.1%	+2.09	0%	-10.34
	8. Empires & Puzzles Epic Match 3 Small Giant Games Puzzle RPG	3.68%	-1.36	0%	
	9. Star Wars™: Galaxy of Heroes Electronic Arts Turn-based RPG	3.49%	-1.35	0%	-4.86
	10. Hero Wars - Fantasy World Nexters Global LTD Turn-based RPG	3.17%	-2.4	11.13%	+6.56

* Change YoY

Source: GameRefinery SaaS Dashboard

Top games and challengers in the **RPG** genre (US iOS)

Key takeaway: These past 12 months have seen two very successful RPG launches, Genshin Impact and MHA. What’s interesting about both of these games is that they are both open-world action RPGs with a strong focus on single-player experience and story elements along with their high production values, particularly in the case of Genshin Impact that brought PC/console-level production rarely seen on mobile. However, they also have some differences. Genshin Impact is excelling in providing a single-player role-playing experience with a vast world to explore, while MHA also has competitive elements as a key part of the experience. Also noteworthy is that all the three latest hit RPGs in this chart have an anime art style.



The megahits of the **RPG** genre in the past 12 months – what are they all about?



Genshin Impact

Analyst's Overview

Our analyst's key takeouts

Erno Kiiski

Game Analyst



Genre & Style

Genshin Impact is a fantasy open-world **action RPG** with cel-shaded manga art style. The game has exceptionally high production values: beautiful audiovisuals and fully voice-acted long storyline with quality cutscenes.

Players wander around the vast open-world exploring, climbing, gliding and fighting. The core gameplay is super fluid and smooth for a mobile free-to-play game which makes the game a bit more skill-focused than most of the action RPGs in the market. One character is in player's active control and with just a push of a button, you can switch to up to four different heroes. Gameplay revolves a lot around elements and making use of them. For example: combining water with ice to freeze enemies or combining electricity with water for a shock effect.

Features & Progression

- Players complete the main story missions and once in a while they need to **level-up** their Adventure rank (player rank) in order to further continue the main missions.
- For experience players can complete **side quests/activities/domains** or explore the open world in order to level-up
- Domains / open world activities can also be completed in **Co-Op**
- **Spiral Abyss** is a dungeon for end-game challenges
- Also very noteworthy is that the game doesn't have any auto-play, auto-loot systems as the core action layer itself is created in such a engaging way.
- Meta of the game is all about collecting different **characters**, **upgrade** them and their **gear** in several different ways

Monetization

- **Character / equipment** gacha (duplicate chars./items are used for specific upgrading type + duplicate currencies (Starglitter, Stardust) are awarded to be used for direct purchases in their respective stores)
- **Battle Pass**
- Bundles of xp items/currency
- **Original Resin** (world activity energy)
- **Subscription** for daily premium currency
- Premium currency **store** with refreshing wares

Special Notes

The game feels a bit like playing a story-driven AAA-console/PC premium title. The story and super polished gameplay pulls players in very tightly, but it is going to be interesting to see how the game sustains after people have completed the super engaging main portion of the game. Currently Spiral Abyss is one of the few endgame features, so it remains to be seen how miHoYo develops the game further in order to keep the players in the game.

[SHOW LESS...](#)

The megahits of the **RPG** genre in the past 12 months – what are they all about?



MHA: The Strongest Hero

Analyst's Overview

Our analyst's key takeouts

Milka Paunonen

Game Analyst



Genre & Style

My Hero Academia: Strongest Hero is an **Action RPG** game based on the story and world of the popular manga and anime series My Hero Academia. The story follows a young boy who wants to become a hero, despite being born without superpowers in a world where they are common. Player gets to experience the story through **fully animated** and voice acted cutscenes. Besides the story, My Hero Academia is very rich with additional content and provides player with a lot to explore.

Features & Progression

The game plays as an Action RPG: player progresses in the world through **quests** that can vary from regular **fighting instances** to **collecting and searching** missions. Players can choose to progress in the main story or do other sub-tasks. After completing each task player's account gets experience and **can level up**, unlocking new features and game modes.

Battle system is real-time based fighting, during which player controls one character at a time. Each character has a basic punch attack and an **additional move set**. Executing skills and punches in a correct succession unleashes special combo attacks that deal a substantial amount of damage. Succeeding in fights requires strategic use of skills and regular punches while simultaneously dodging enemy attacks. Player can choose to fight enemies directly or use Auto-play during the PvE content.

Player collects **characters** that can be used in battle. Sometimes player controls only one character but some game modes require using a team of characters. The main method of progression is upgrading these characters in various ways: either **leveling up**, **raising their rank**, raising their **affinity level** or upgrading **talents and skills**. Furthermore, characters can be equipped with various different **Skill Cards** and **Chips** that provide – sometimes significant – stat boosts.

When not progressing the story, player can choose to explore separate **single-player modes** for upgrading resources, challenge PvE content in **Co-op missions** or engage in PvP in either **synchronous** or **asynchronous** battle. In the synchronous mode players fight in **1v1 setting** with their strongest characters. The fighting is similar to what we are used to in PvE content, but auto-play is not allowed. The asynchronous PvP is **AI-calculated team battle** and players can't control their characters.

Guild system is available as well. Guild members can donate to their guild to level it up, take part in asynchronous PvE boss battle and ultimately fight other guilds in the special **GvG battle**.

Monetization

MHA: The Strongest Hero has several different **gachas** that are used for collecting characters (and later upgrading materials) and support cards. Furthermore, the game has progression systems that have paid layers, like **Battle Pass** and **Paid progression plans**. Players can choose to purchase different **subscription plans**, and the game offers several **bundles** as well. **Stamina can be replenished** by spending premium currency.

Special Notes





The game has A LOT of **achievements and tasks** to complete all over the game. Each game mode has its own achievement list, and the player is rewarded for even the slightest progression.



Features & Updates

- Top updates
- Implementation examples

Top updates with the biggest 7D revenue impact within the **RPG** genre

Version Date	Game	Revenue	Downloads	REV / DL	Features
May 26, 2021 3.3.0 CONTENT EVENT FOXES	 DRAGON BALL LEGENDS BANDAI NAMCO Entertain... Fighting	▲ +840% +\$1.24m	▲ +96% +13.90k	▲ +380% +\$38.82	Updated Features Limited time IAP-offers Live events - Non-recurring Number of gachas : 5+ Shop with gacha mechanics / refreshing wares Special live event currency/materials
Mar 24, 2021 3.0.0 CONTENT EVENT FEATURE FOXES	 FFBE WAR OF THE VISI... SQUARE ENIX Turn-based RPG	▲ +376% +\$216.90k	▲ +231% +2.60k	▲ +44% +\$22.55	Feature Changes Number of different permanent boosts 1 to 10 → 11 to 50 Number of different permanent boosts to purchase 1 to 10 → 11 to 50 Spectator mode ✕ → ✓ Updated Features Boss battles Guild mechanics Limited time IAP-offers Live events - Non-recurring Non-competitive co-op - Tasks Number of different decoratives - Other : 51+ Number of gachas : 5+ Promotional collaboration events Task/quest system
Jun 3, 2021 2.17.0 CONTENT EVENT FOXES	 Fate/Grand Order (Engli... Aniplex Inc. Turn-based RPG	▲ +345% +\$350.90k	▲ +32% +542	▲ +238% +\$141.57	Updated Features Limited time gacha Live events - Non-recurring Number of different material items : 7+ Story - Background explained Story - Main characters Story - Storytelling/dialogue elements
Feb 2, 2021 1.3.0 CONTENT EVENT SEASONAL	 Genshin Impact miHoYo Limited Action RPG	▲ +225% +\$2.97m	▲ +41% +25.10k	▲ +131% +\$28.06	Updated Features Live events - Non-recurring Number of different characters : 11 to 50 Number of different characters to purchase : 11 to 50 Number of different equipment items : 51+ Number of different equipment items to purchase : 51+ Number of enemy types : 21+ Number of gachas : 3 to 4 Shop with gacha mechanics / refreshing wares Special live event currency/materials Special rewards from live events



Erno Kiiski
Chief Game Analyst - US

Mobile F2P RPGs are feature-rich titles where often the monetization is all about character collection mechanics. That can also be seen with the updates with the biggest upticks in the revenues. Especially for gacha-based RPGs, there are always absolutely massive spikes on revenues when new characters are introduced through new banner gachas / other offers.

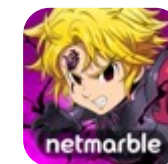
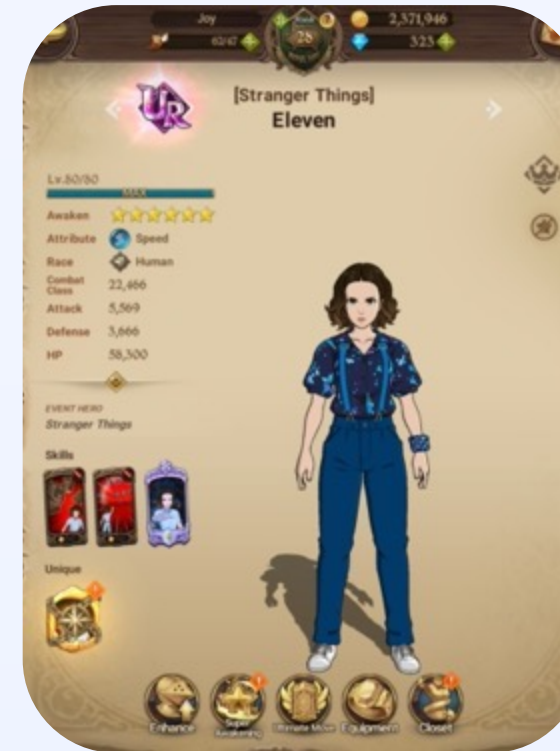
Another increasingly common way to engage new audiences and offer something very out of the box in various RPGs (especially from Asian companies) are different collaboration events. We have seen a bunch of games (again, often Asian-based RPGs) do this to great success. For example, Seven Deadly Sins: Grand Cross has had multiple interesting collaborations with IPs like Stranger Things + Attack on Titan.

Implementation examples from top RPG games: Limited-Time Events



Genshin Impact – Theater Mechanicus event

Theater Mechanicus was a tower-defense-inspired live event. The objective of Theater Mechanicus was to use various strategies to withstand waves of enemies. During these waves, monsters will follow predetermined paths through the level. Players' job was to stop them before they reach the other end. But the twist here is that you can't actually do any damage to them, only inflict them with different elemental effects. Players need to construct various Mechanici (towers) at predetermined positions and use them to deal damage to monsters and prevent them from getting to their goal. When the level ends, you will receive a certain number of Veneficus Sigils as a reward. Veneficus Sigils can be used to unlock and upgrade Mechanici so that they are stronger for the next round. Genshin Impact's rumored 200 million USD/year budget for live ops can be noticed by the incredible cadence of super-polished events with even new gameplay modes like in this event.



The Seven Deadly Sins – Stranger Things Collaboration Event

The Seven Deadly Sins is no stranger to rolling out IP-crossover events. One of the most recent ones was the collaboration between 7DS and Stranger Things. The event's content included, e.g., specially made cutscenes, areas to explore both in Liones and Upside Down, new heroes from Hawkings, and a separate PvE-mode.

The event also had a robust monetization scheme with limited time gachas, exchange shops, and bundle offers – truly making the event feel exciting and exclusive.

Implementation examples from top **RPG** games: **Special Gacha Mechanics**



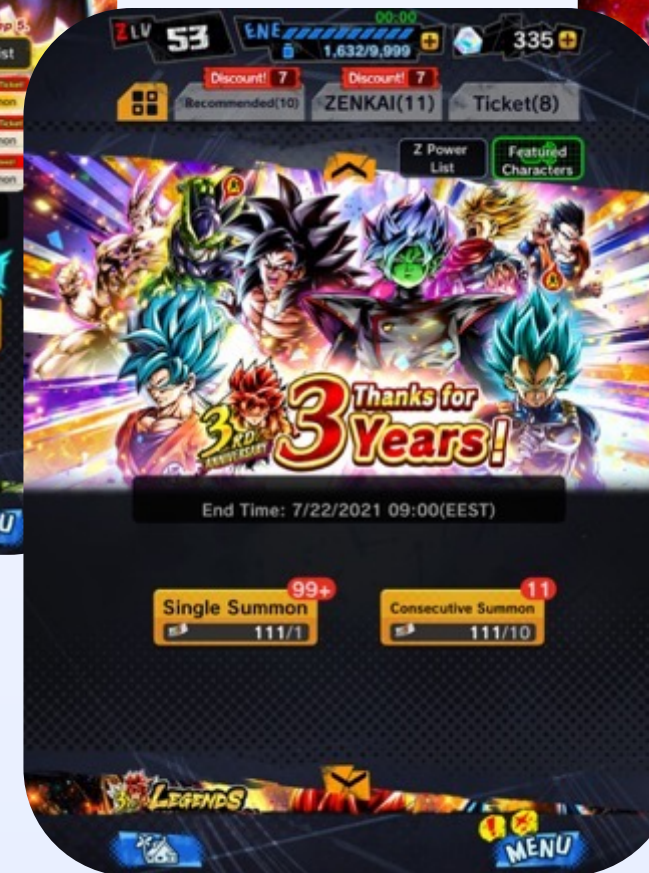
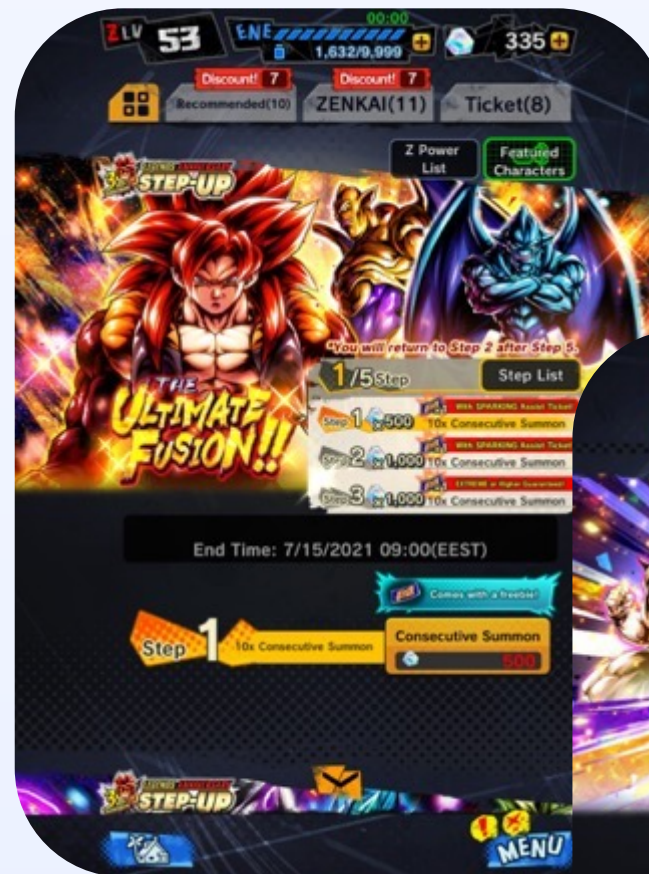
Erno Kiiski

Chief Game Analyst - US

As everyone knows, gachas are one of the leading monetization mechanics for mobile f2p RPGs. But there are also a bunch of different ways that gachas can be implemented instead of your usual approach. Gachas can, for example, have limited-time higher rates for new characters (the basic "banner gacha" implementation), special step-up gacha mechanics with additional bonus rewards for pulling the gacha, board-game like gachas, and more.

In this example, Dragon Ball Legends celebrates its 3rd anniversary with a collection of different limited-time gachas. In the so-called step-up gacha are five different steps with increasing bonus rewards for pulling the gacha. Each consecutive gacha pull gives the player an additional bonus reward, which in this case was tickets for other anniversary gachas in the game.

For more detailed case-by-case examples, check out the GameRefinery service and/or contact us directly!

















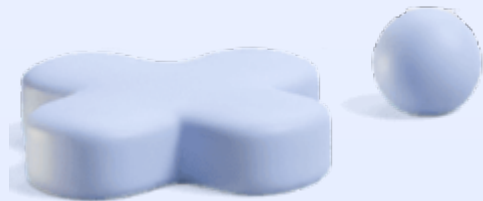
Motivations

- The motivation framework
- Top game's motivation comparison

GameRefinery's Motivation Framework

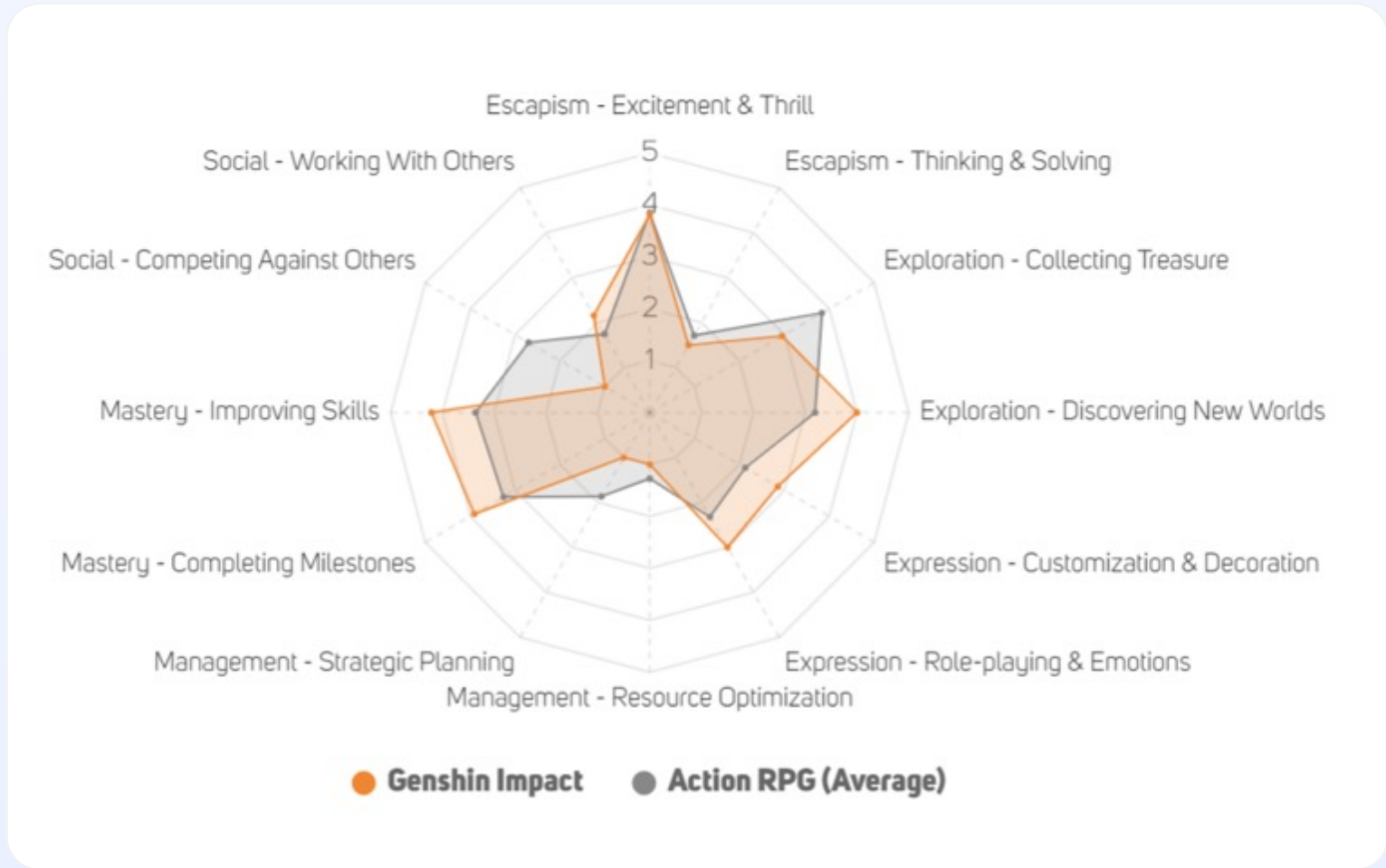
- GameRefinery uses a proprietary motivation model consisting of twelve different Motivational Drivers, each covering a separate player root motivation.
- These Motivational Drivers are also grouped based on their nature to form meaningful pairs or “motivational groups” - for example Improving skills 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 Genshin Impact vs. RPG games in general

Motivational drivers describe the main reasons players enjoy playing the game



Score 5 = very important, 1 = not important



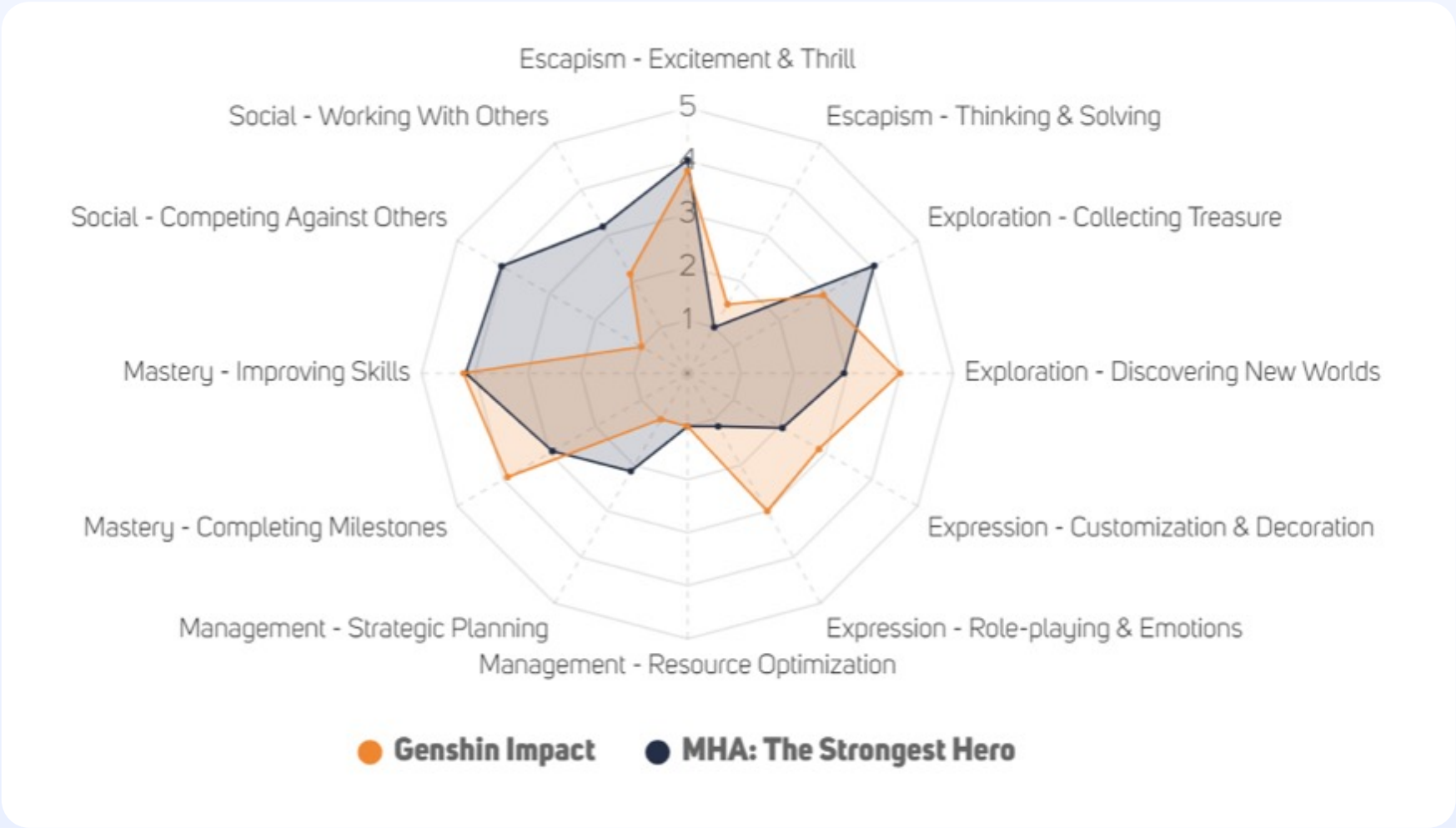
Erno Kiiski
Chief Game Analyst - US

What sets Genshin Impact apart from other RPGs is its increased focus on exploration and enhanced role-playing elements, and skill-based gameplay

Genshin impacts vast open-world gives players an exceptionally large sandbox to explore while the meta game provides players with different characters to collect, upgrade and gear up. The fleshed-out fluid combat system makes the game more skill-focused than most action RPGs on the market.

Motivational Drivers of Genshin Impact vs. MHA

Motivational drivers describe the main reasons players enjoy playing the game.



Score 5 = very important, 1 = not important



Erno Kiiski
Chief Game Analyst - US

Although both games are action RPGs Genshin Impact and MHA: The Strongest Hero appeal to slightly different player types.

While Genshin Impact excels in providing a single-player role-playing experience with a vast world to explore, MHA leans on competitive gameplay elements.

MHA provides players with social experiences with both co-op PVE gameplay along with synchronous and asynchronous PVP combat.



Erno Kiiski

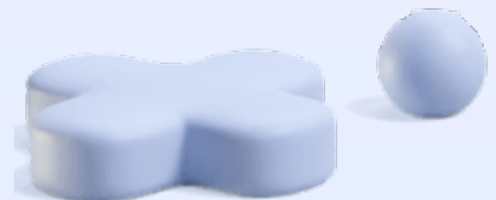
Chief Game Analyst - US

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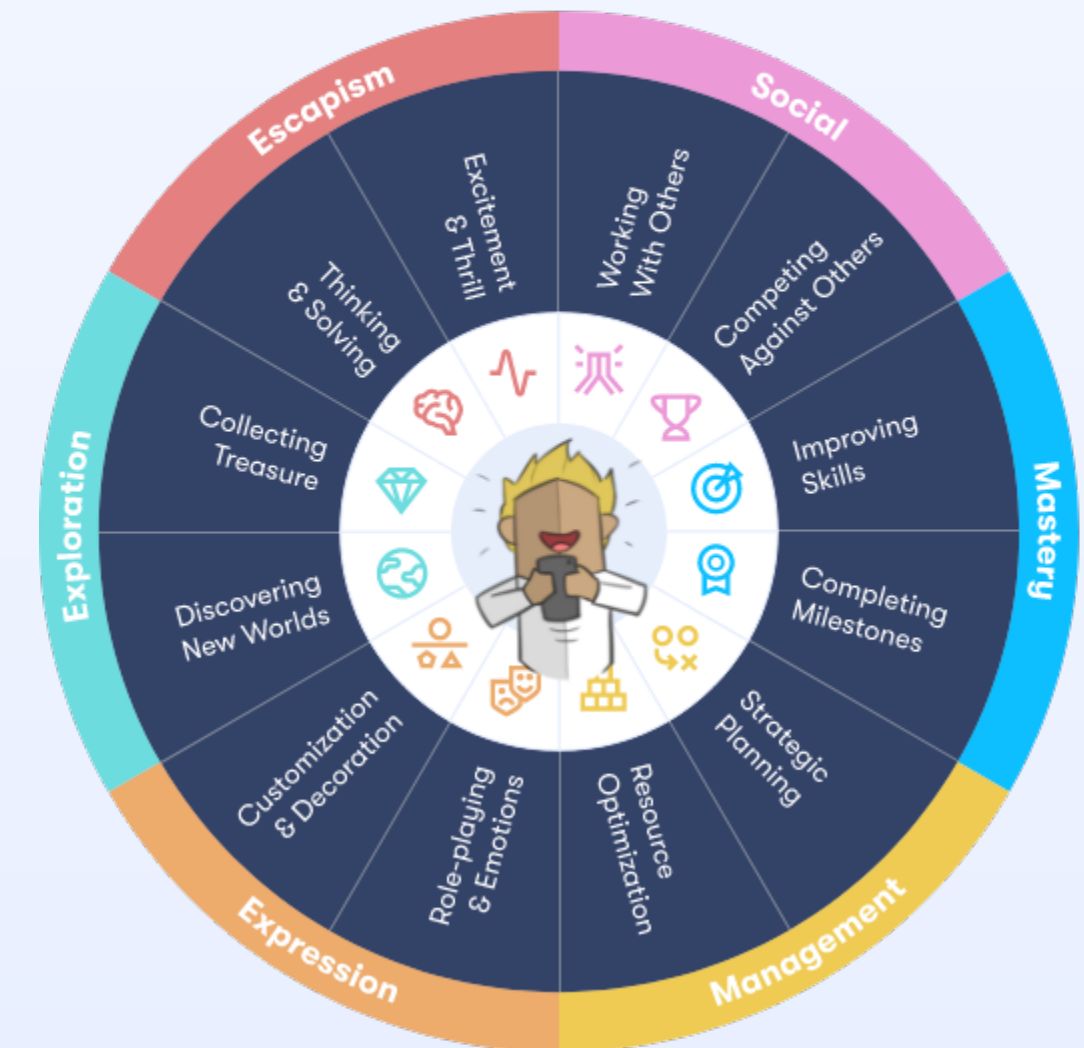
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12 Player Motivations



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