



**LIQUID&GRIT**

## **RPG REPORT**

Competitive Research and Actionable Product Recommendations

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2020

# REVENUE DRIVER



RPG > EVENTS > CLUBS

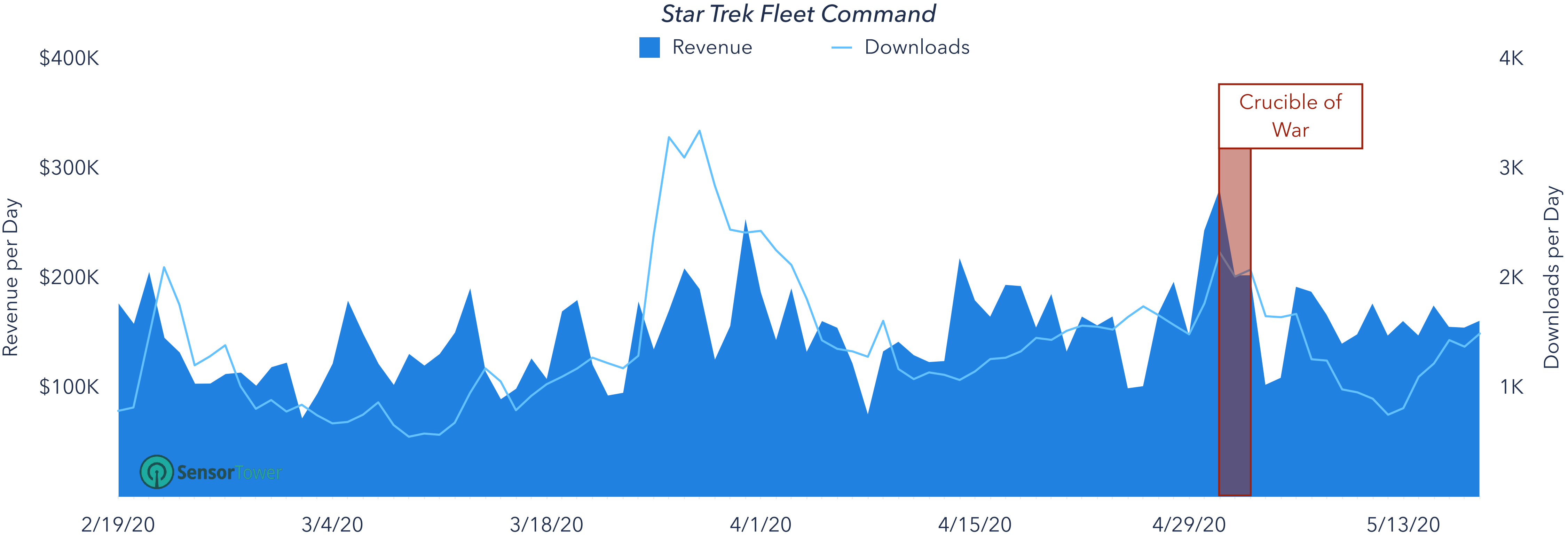
# ACCESSIBLE CLUB CHALLENGE EVENT

Crucible of War in *Star Trek Fleet Command*

# REVENUE ANALYSIS

After the launch of *Crucible of War*, *Star Trek Fleet Command*'s revenue was +88% and downloads were +29% 3Do3D compared to the same days from the previous week.

Releases
4/29-4/30: <a href="#">Faction Hunt</a> challenge event
4/30: <a href="#">Choose Your Next Event #2</a> survey
5/1: <ul style="list-style-type: none"><li>\$4.99 Special Offer IAP moved +1 to #3</li><li>\$19.99 Special Offer IAP moved +1 to #9</li></ul>
5/1-5/3: <a href="#">Crucible of War (May Update)</a> challenge event
5/1-5/5: <a href="#">Gold Trophy Recruit and Utility Pack</a> reward event
5/1-ongoing: <a href="#">May Reward Packs</a> purchase event
5/2-5/3: <a href="#">Elite Jellyfish Pack</a> purchase event



Graph data is iOS U.S. only.  
3Do3D = 3 days compared to the same 3 days from the previous week.



# FEATURE TEARDOWN

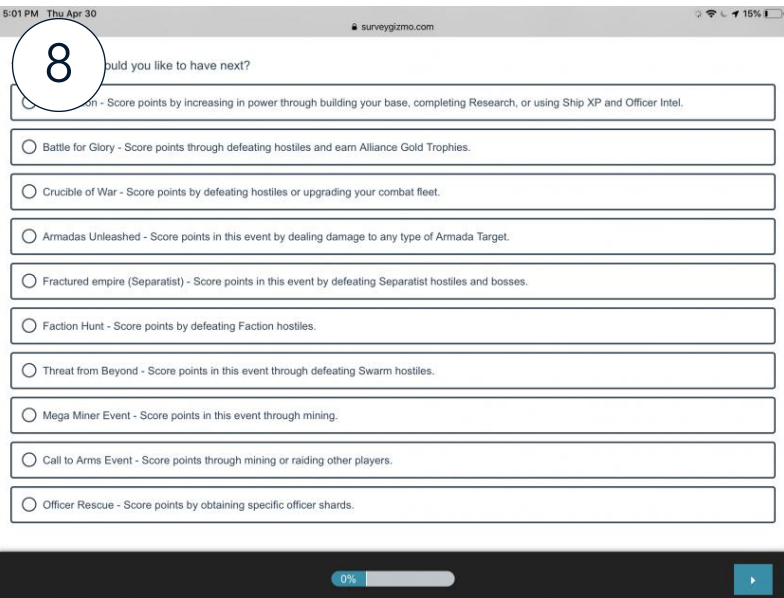
Players complete challenges to earn solo and alliance points for trophies at milestones. Trophies can be spent in solo and alliance event stores.

## Details

- In solo challenges, players earn points for defeating enemies, upgrading ships, or spending resources (1).
  - Solo challenges award prizes at milestones, including gold and silver trophies (2).
  - Gold and silver trophies can be used to purchase hero summons or resource chests (3 and video).
- In alliance challenges, players earn alliance points for collecting gold or silver trophies, using or upgrading ships, killing enemies, or spending resources (4).
  - Alliances earn event trophies and other rewards at milestones.
  - Players must earn at least one point for their alliance prior to a milestone to receive the reward.
  - Event trophies can be used to purchase event bundles in an alliance store (5 and 6).
- Competitive alliance challenges award resources to alliances based on their ranks (7).
- A survey lets players vote on which event they want to see next (8).

## Additional Information

- See the [Crucible of War](#) and [Choose Your Next Event #2](#) Libraries for more images and videos.





# PRODUCT INSIGHTS

Invest in community health with club events that enable meaningful contributions from both casual and hardcore players. Offer customizable rewards to provide relevant prizes for a wide range of player levels—with opportunities for rare drops to keep things exciting.

## Insight Details

- **Allow players of all levels to contribute to club events to draw in casual and hardcore players.** Casual players often feel excluded from club events due to level restrictions—even though they would like to participate. As one such player said during a series of interviews we conducted with 20 mobile RPG players, "At least scale [community events] so that everybody can do it."  
  
This lack of participation by casual players affects hardcore players, too: in a survey of over 270,000 players, Quantic Foundry found a strong correlation between competitive and community motivations.<sup>1</sup> Our own interviews confirmed this relationship: the highest performing (and highest spending) players tended to be the most motivated by community *and* the most concerned with community health.
- **A declining player base is one of the most common reasons hardcore players give for abandoning a game.** High-level players tend to view their substantial spending as a long-term investment and will stop making purchases if they sense that a player base is deteriorating. To this end, many expressed a desire for more accessible club events that “keep everything on a nice, level playing field” to enable more widespread engagement and support community health.
- **Blend customizable bundles and loot box mechanics to ensure that rewards are both relevant and exciting.** While casual players are more likely to avoid events due to difficulty or level requirements, our interviews showed that hardcore players are most likely to avoid events due to a lack of relevant rewards. Crucible of War allows players to tailor rewards to their needs by choosing from different bundles in an event store. A similar approach to [customizable IAP bundles](#) contributed to +23% and +38% WoW revenue increases during two festival events in *Last Shelter: Survival* (1).

At the same time, Crucible of War's bundles also include the chance for rare rewards with loot box mechanics to greatly increase arousal, motivation, and the urge to seek more rewards.<sup>2</sup> This has the added benefit of superimposing a high-stakes variable-ratio reward schedule on top of the guaranteed, fixed-ratio rewards of the customizable bundles—bridging the motivational gaps of a single reward schedule and ensuring a consistent, high response rate from players.<sup>3</sup>



<sup>1</sup> [Competition Is Not The Opposite of Community](#)

<sup>3</sup> [Designing Games](#), p. 209-210

<sup>2</sup> [Rare Loot Box Rewards Trigger Larger Arousal and Reward Responses, and Greater Urge to Open More Loot Boxes](#)

# REVENUE MOVEMENT





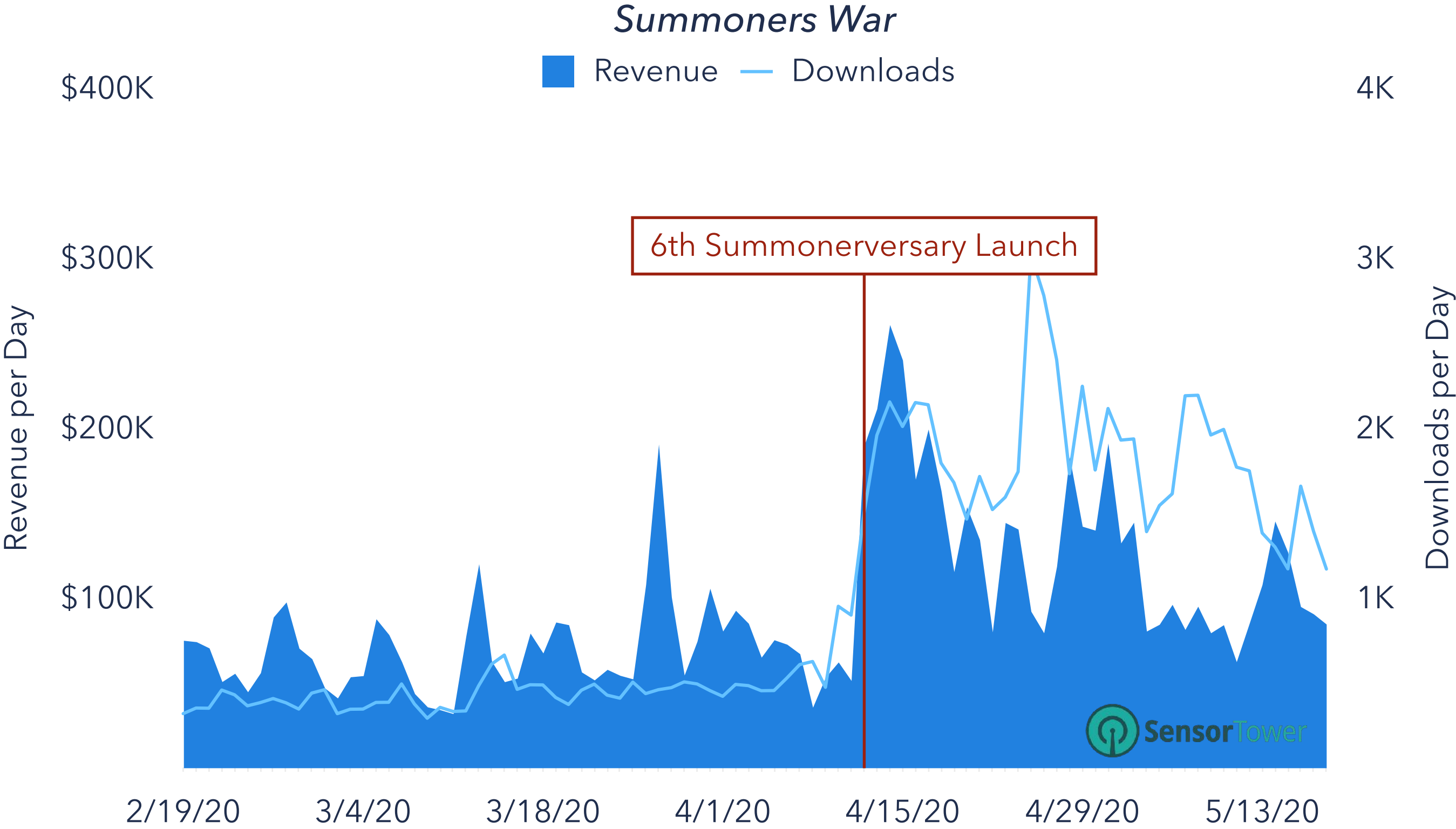
RPG > EVENTS > COLLECTIONS

# DOWNLOADS PUSH AND REVENUE SPIKE

6th Summonersversary in *Summoners War*

# REVENUE ANALYSIS

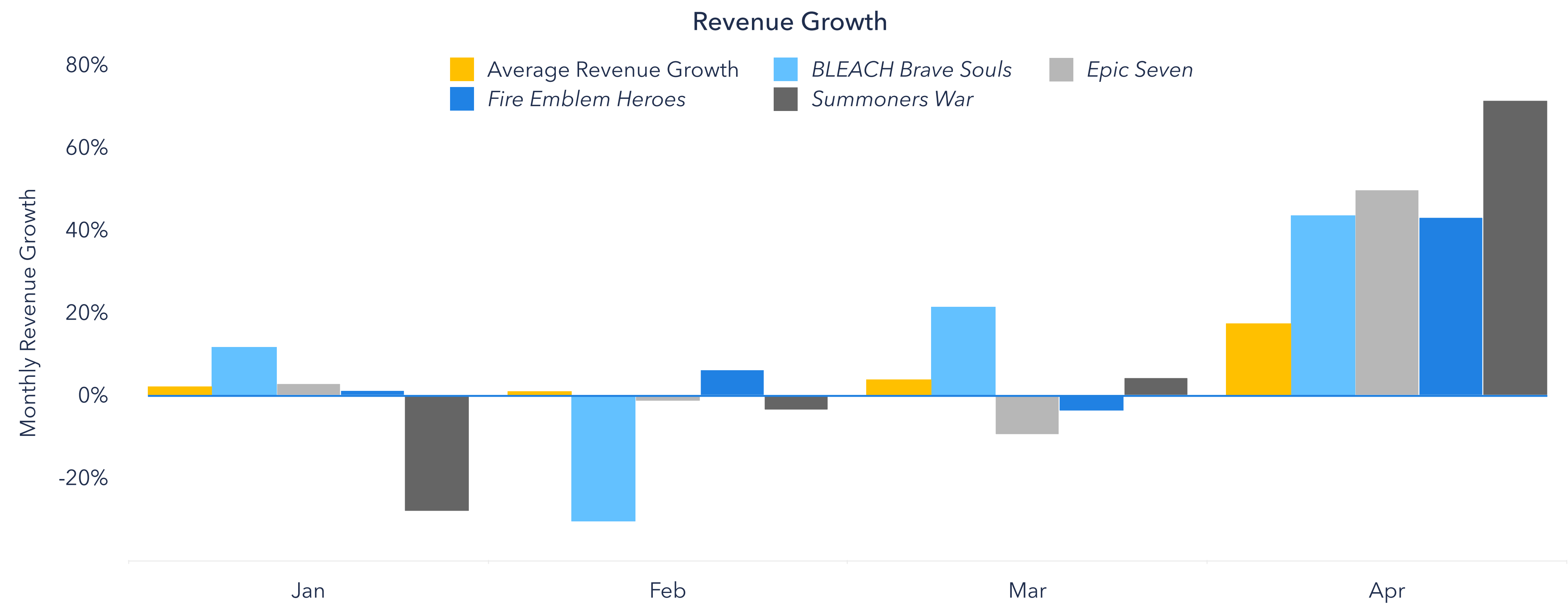
*Summoners War* combined the 6th Summonersversary collection event with retention bonuses, new IAP bundles, and boosts targeted at new players. A major downloads push included animated cinematics and emphasized free items ([video](#)). These efforts resulted in substantial growth: revenue was +82% and downloads were +273% MoM following the event's release.



Releases
4/12-ongoing: <a href="#">6th Summonersversary</a> collection event
4/13: Version update
• 4/13: <a href="#">New Guide Quest</a> mission feature
• 4/13: <a href="#">Scenario First Clear Rewards Update</a> mission feature
• 4/13: <a href="#">UI/UX Updates</a> cosmetics feature
4/13: \$29.99 Rune Reappraisal Pack IAP to #10 (NPL)
4/13-ongoing: <a href="#">6th Anniversary Special Pack</a> purchase event
4/14-4/19: <a href="#">4x Google Play Point Event</a> accelerator event
*NPL = <i>Not previously listed</i>

# APRIL REVENUE GROWTH SPIKES

RPG revenue shot up in April, and four apps more than doubled the average growth rate. *Summoners War* topped the list with a 71.5% MoM revenue increase—over four times the average.



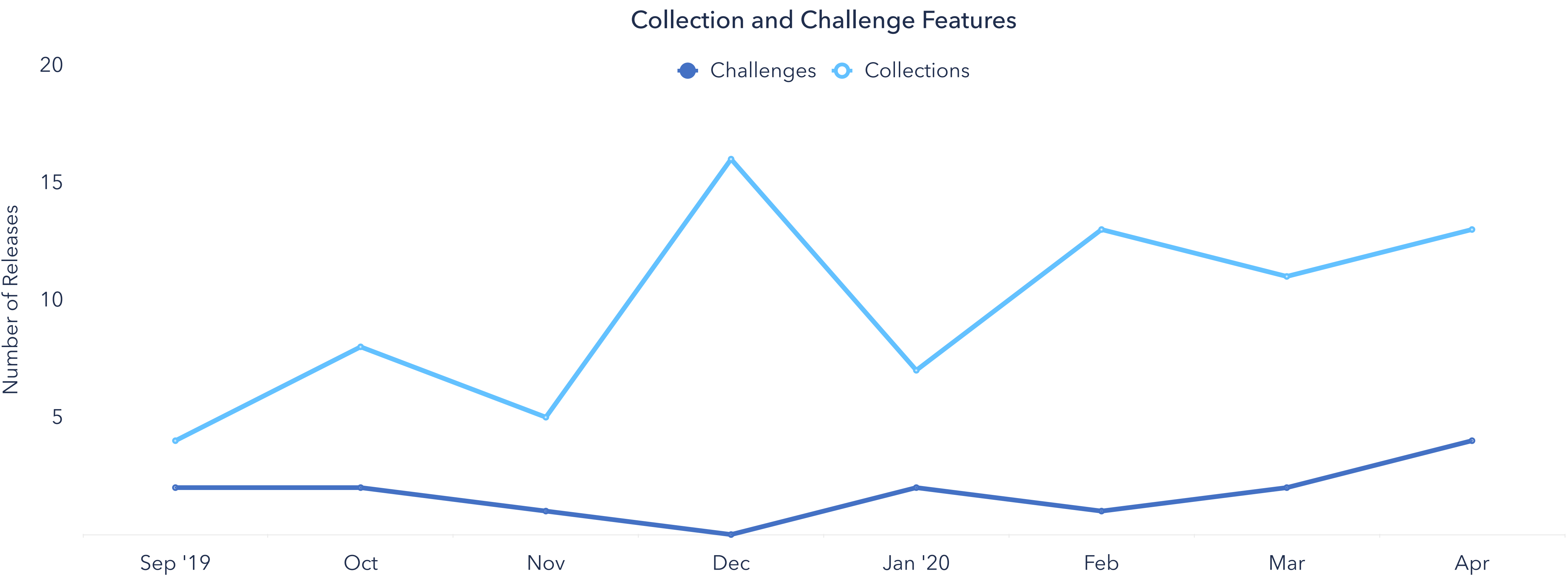
# INVESTMENT TRENDS





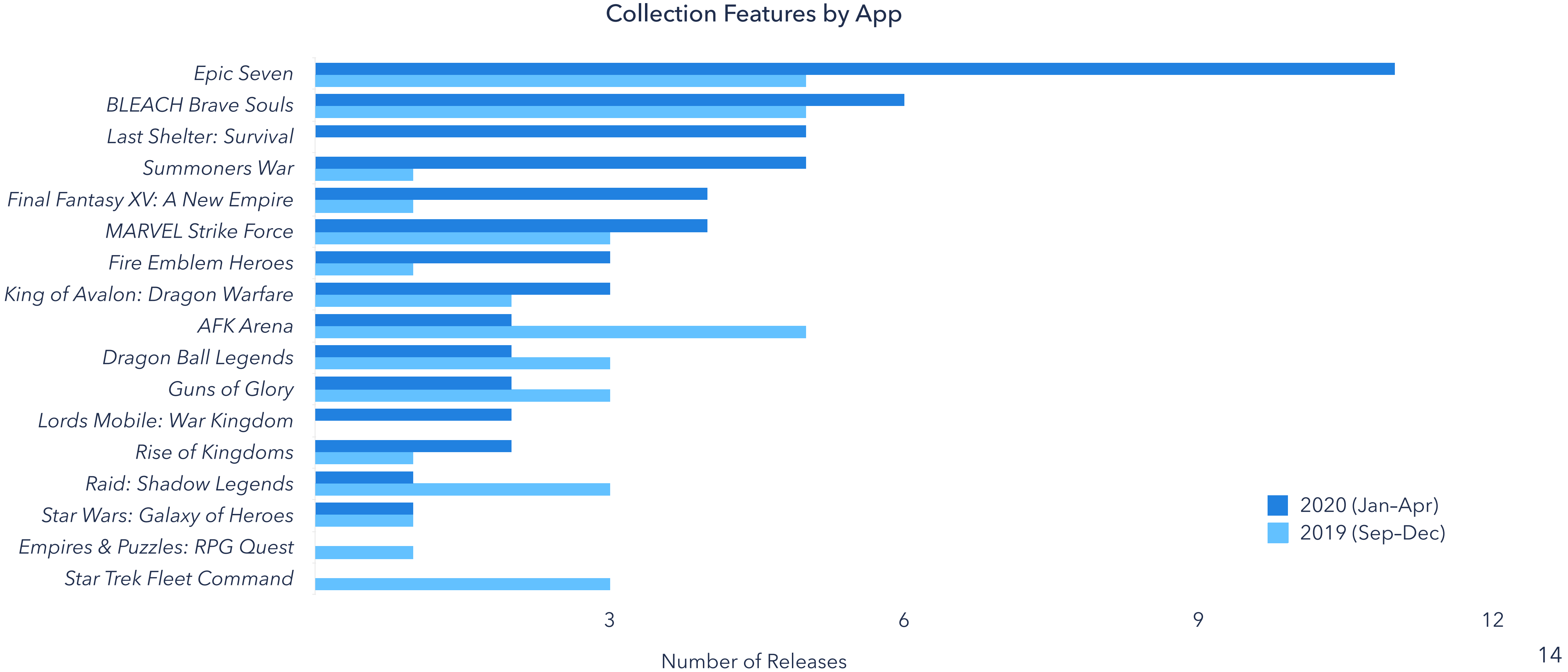
# COLLECTION & CHALLENGE FEATURES

Collection feature investment is up 33% in tracked apps for 2020 compared to the last four month of 2019. Challenge feature investment is up slightly in April after remaining relatively flat since September.



# COLLECTION FEATURES BY APP

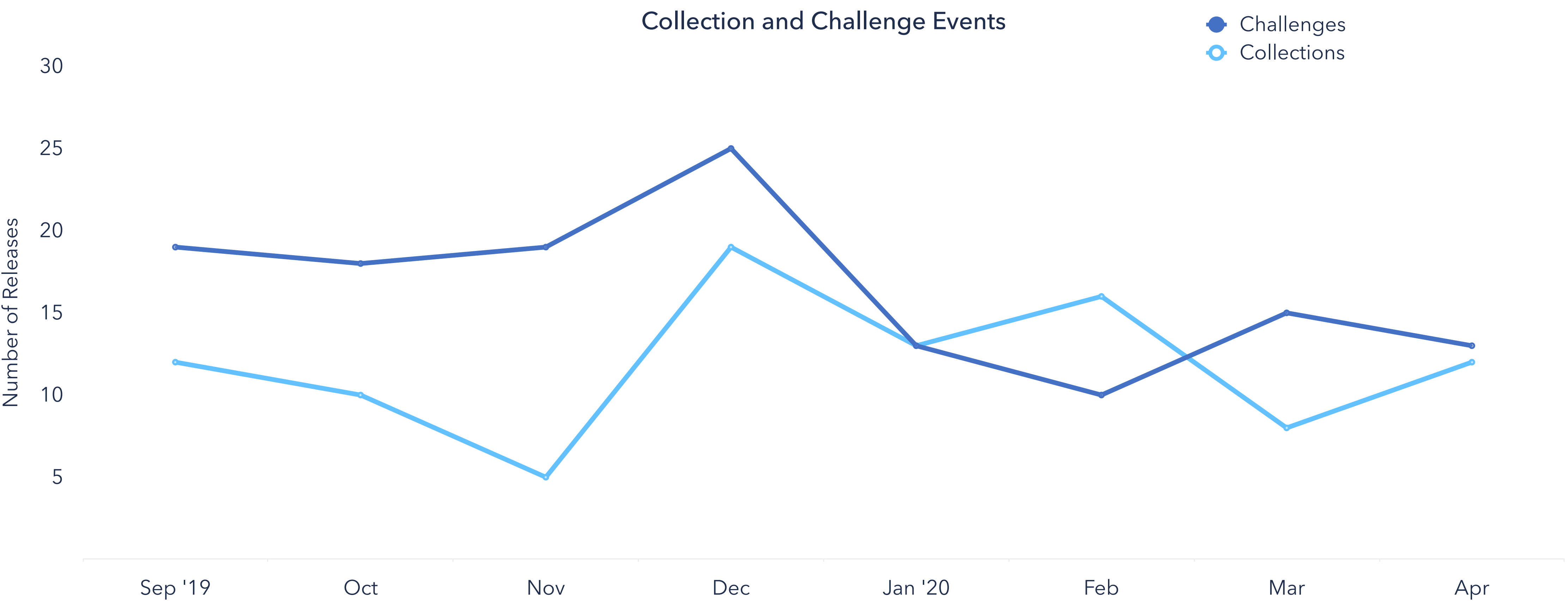
Multiple apps have more than doubled their collection feature releases over the last eight months. *Epic Seven* has made the greatest investment in collection features with 11 releases so far in 2020.



# COLLECTION & CHALLENGE EVENTS

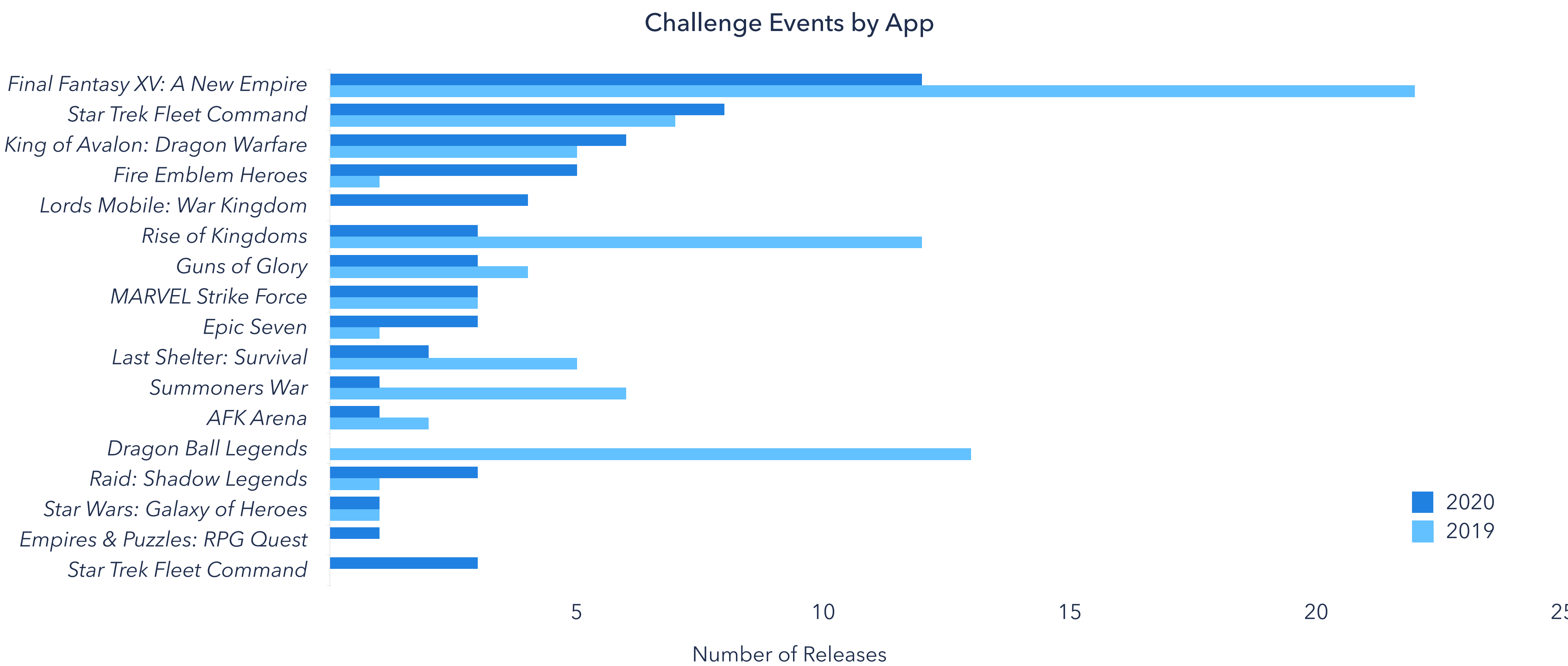


Investment in challenge events is down in 2020: tracked apps have released an average of 7.5 fewer challenge events per month in 2020 compared to the last four months of 2019.



# CHALLENGE EVENTS BY APP

*Dragon Ball Legends* appears to have significantly decreased its investment in challenge events so far in 2020. During the same period, *Final Fantasy XV: A New Empire* reduced challenge events by 50%, and *Rise of Kingdoms* cut them by 75%.





# NEW CONTENT

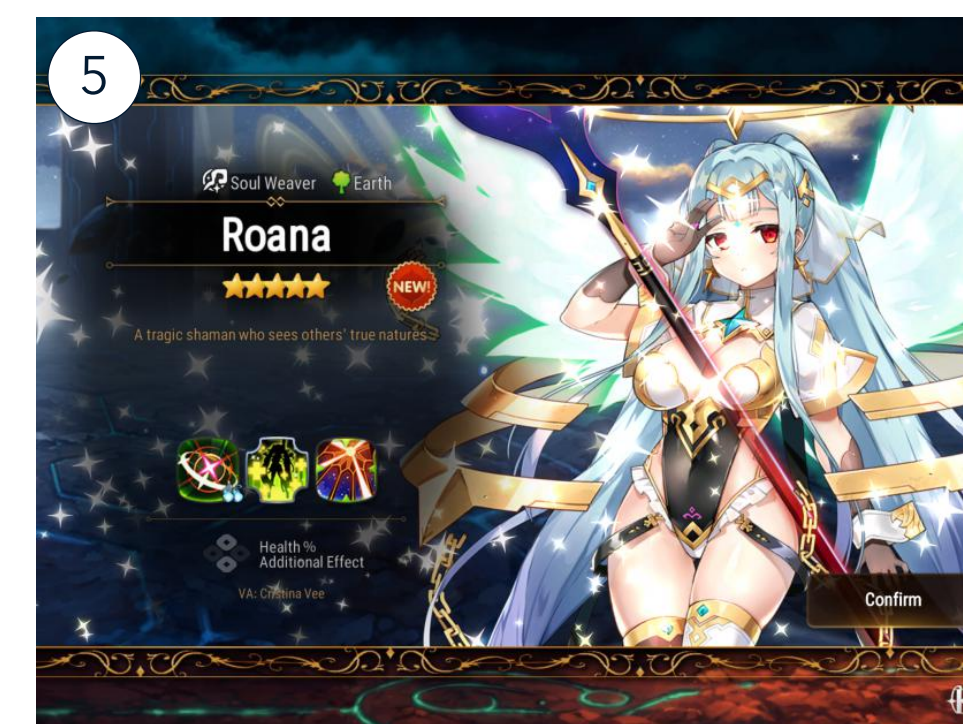




# CONTENT RELEASES I

## RPG > Content > Abilities, Equipment, and Heroes

- 4/6: [Hero Balance Changes](#) – AFK Arena abilities  
4/20: [Hero Balance Changes](#) – AFK Arena abilities  
4/6: [Oscar](#) – AFK Arena hero (1)  
4/6: [Ukyo Tachibana](#) – AFK Arena hero (2)  
4/16: [The Desert Society](#) – BLEACH Brave Souls heroes  
4/30: [Thousand-Year Blood War Round 9](#) – BLEACH Brave Souls heroes (3)  
4/8: [Awakened What's Going On? No. 1](#) – Dragon Ball Legends equipment  
4/8: [Goodbye Dad](#) – Dragon Ball Legends equipment  
4/8: [The Biggest Crisis](#) – Dragon Ball Legends equipment  
4/15: [There's no way that WE... Could lose to someone like you!](#) – Dragon Ball Legends equipment  
4/8: [Ultra Space-Time Summon #21](#) – Dragon Ball Legends heroes  
4/22: [Legends Power of Fusion](#) – Dragon Ball Legends heroes  
4/29: [Kakarot Goku](#) – Dragon Ball Legends hero  
4/1: [Malosi](#) – Empires & Puzzles hero (4)  
4/6: [Springvale Festival](#) – Empires & Puzzles heroes  
4/16: [Balance Adjustments](#) – Epic Seven abilities  
4/30: [Adventurer Ras Specialty Change](#) – Epic Seven abilities  
4/2: [Alabastron](#) – Epic Seven equipment  
4/6: [Victorious Flag](#) – Epic Seven equipment  
4/9: [Touch of Rekos](#) – Epic Seven equipment  
4/9: [Roana](#) – Epic Seven hero (5)  
4/16: [Sinful Angelica](#) – Epic Seven hero (6)

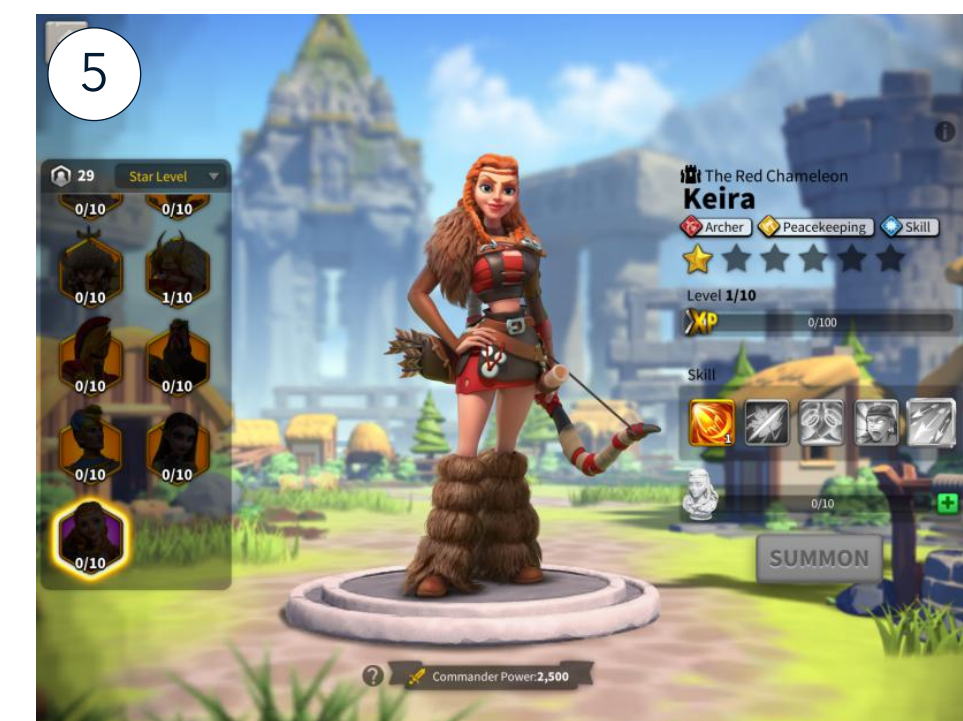
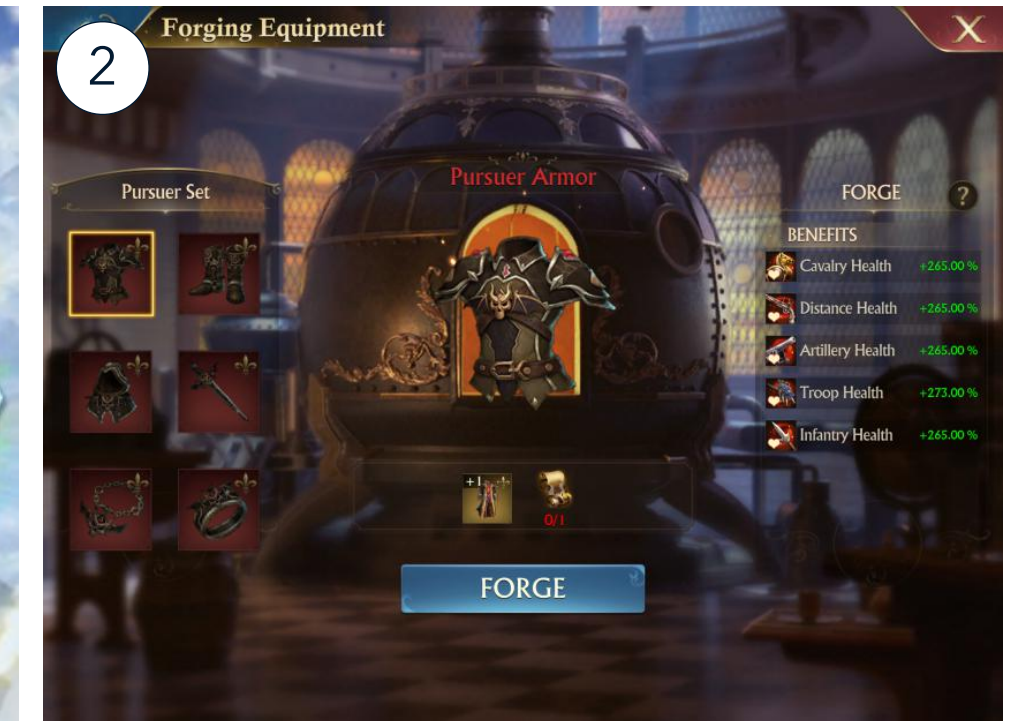




# CONTENT RELEASES II

## RPG > Content > Abilities, Equipment, and Heroes

- 4/2: [Noctis Lv 300](#) – Final Fantasy XV: A New Empire ability  
4/13: [Prompto Lv 300](#) – Final Fantasy XV: A New Empire abilities  
4/24: [Gladio Lv 300](#) – Final Fantasy XV: A New Empire abilities  
4/10: [Monster Slayer's Gearset](#) – Final Fantasy XV: A New Empire equipment  
4/7: [Weapon Refinery Update](#) – Fire Emblem Heroes abilities  
4/8: [Journey Begins](#) – Fire Emblem Heroes heroes  
4/10: [Azura: Lady of the Lake](#) – Fire Emblem Heroes hero  
4/20: [The Start of It All](#) – Fire Emblem Heroes heroes (1)  
4/21: [Minerva: Princess-Knight](#) – Fire Emblem Heroes hero  
4/30: [Edelgard: Flame Emperor](#) – Fire Emblem Heroes hero  
4/14: [Pursuer Set](#) – Guns of Glory equipment (2)  
4/15: [Water Drake Dragon Emblem](#) – King of Avalon: Dragon Warfare equipment  
4/1: [Proxima Midnight](#) – MARVEL Strike Force hero (3)  
4/21: [Corvus Glaive](#) – MARVEL Strike Force hero  
4/1: [Epic Borg Tribble Officer](#) – Star Trek Fleet Command hero (4)  
4/6: [Champion Rebalances](#) – Raid: Shadow Legends abilities  
4/8: [Skull Lord Var-Gall](#) – Raid: Shadow Legends hero  
4/15: [Keira](#) – Rise of Kingdoms hero (5)  
4/22: [Cara Dune](#) – Star Wars: Galaxy of Heroes hero  
4/22: [Greef Karga](#) – Star Wars: Galaxy of Heroes hero  
4/30: [The Mandalorian](#) – Star Wars: Galaxy of Heroes hero (6)





# MARKET WATCH





# SOFT-LAUNCH & BREAKOUT APPS I

## ***The Seven Deadly Sins*** by Netmarble Corporation

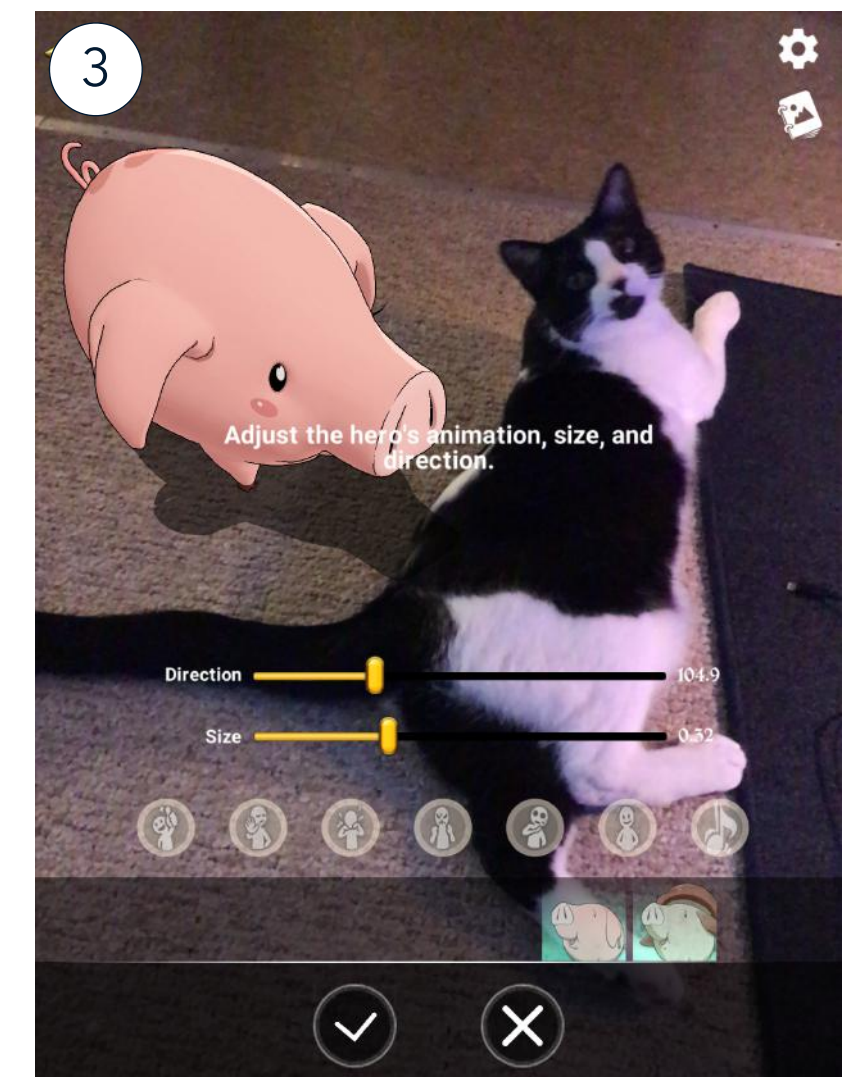
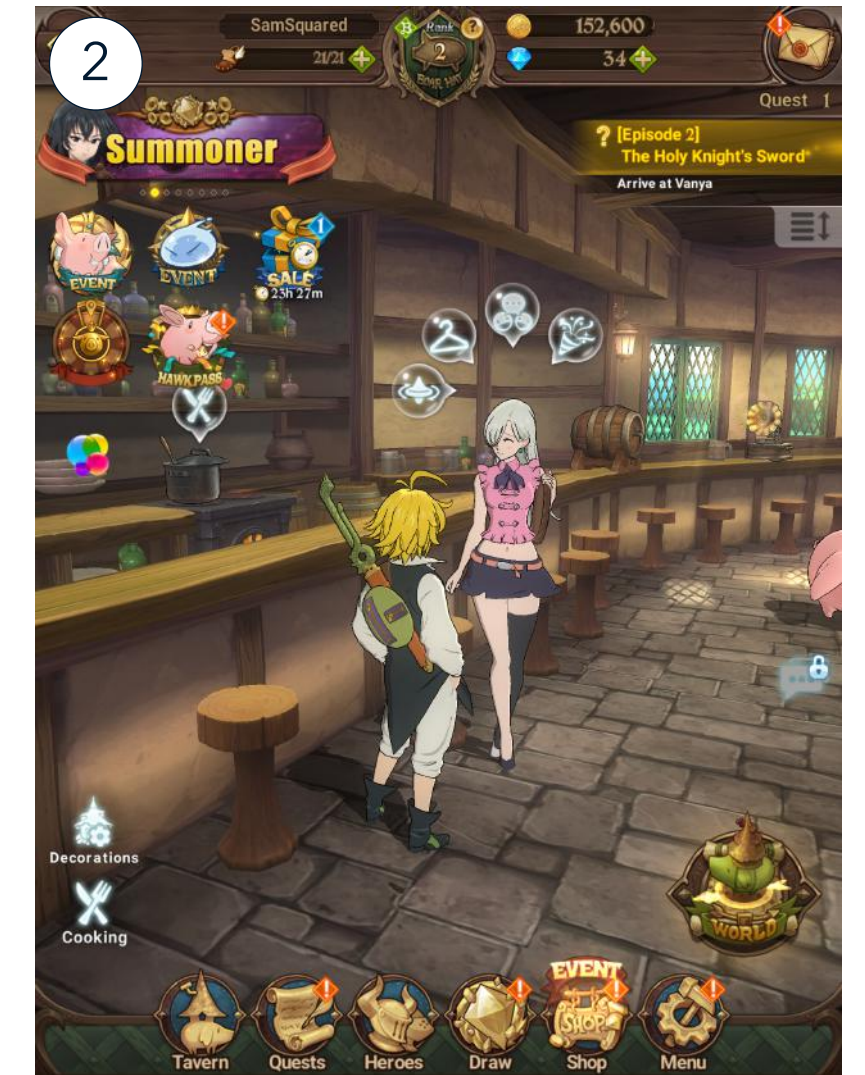
- This anime adaptation includes fully voiced cutscenes with the original cast of actors.
- Players can customize characters with outfits from the show and exclusive to the app.
- Combat combines turn-based actions with a battle card system to trigger special moves (1).
- Additional features include cooperative 2-player boss battles, a PvP arena, explorable towns, and a hub for characters (2).
- AR integration lets players stage battles and take pictures with their characters (3).

### Launch Information

- 7th highest grossing RPG as of 5/1
- Released worldwide on 3/31/20
- Average daily revenue: \$108,726
- Average daily downloads: 13,147
- View *The Seven Deadly Sins* on the [App Store](#).

AR photo and video filters can increase players' identification with their heroes—a proven driver of intrinsic motivation.<sup>4</sup>

When paired with social media, AR filters can be powerful marketing tools, too: in 2016, Gatorade launched a Super Bowl Snapchat promotion that allowed users to dump AR buckets of Gatorade on their heads. The campaign got over *160 million impressions*—almost 40% more people than actually watched the Super Bowl!<sup>5</sup>



<sup>4</sup> [Fostering Intrinsic Motivation through Avatar Identification in Digital Games](#)

<sup>5</sup> [Gatorade's Super Bowl Snapchat filter got 160 million impressions](#)



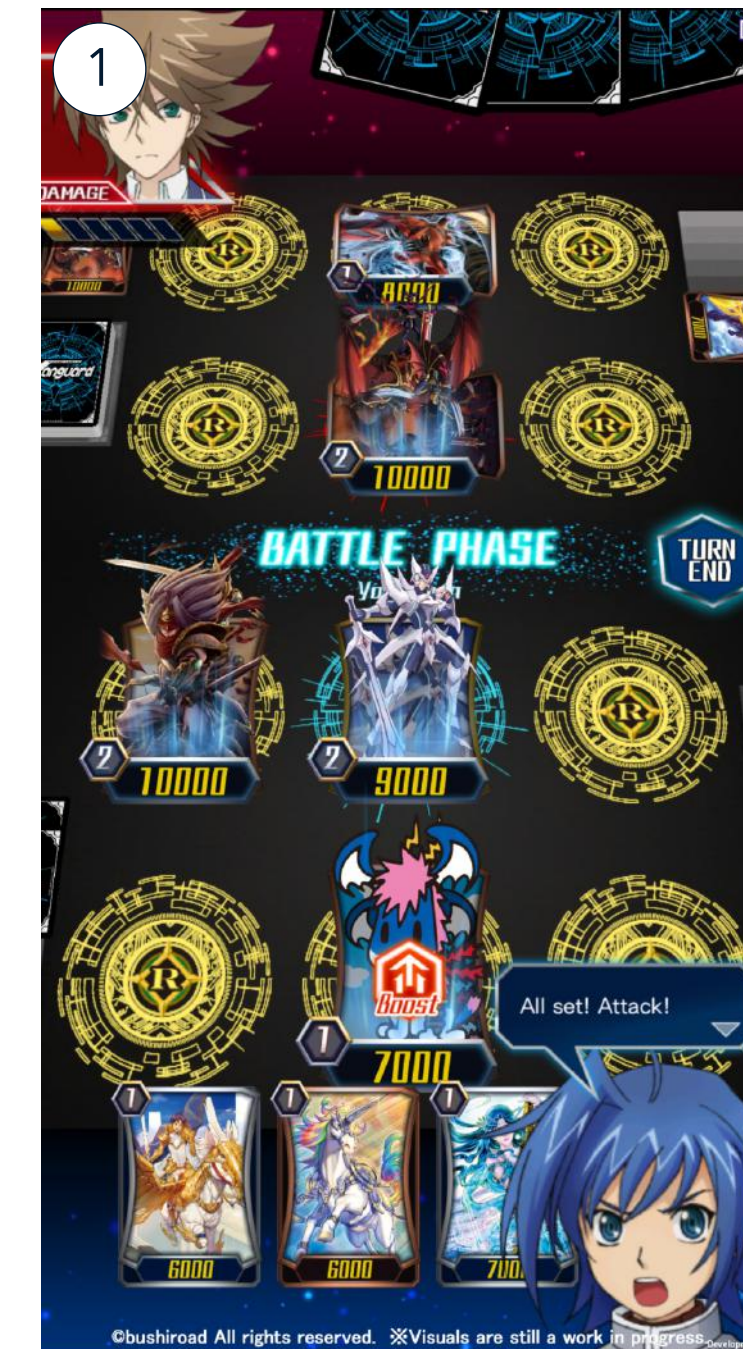
# SOFT-LAUNCH & BREAKOUT APPS II

## **Vanguard ZERO** by Bushiroad International

- This mobile port of the *Cardfight!! Vanguard* trading card game and anime includes simplified rules optimized for mobile (1).
- A story mode based on the anime includes animated cutscenes.
- Other modes include PvP battles and a room that players can customize for their heroes (2).

### Launch Information

- 30th highest grossing RPG as of 5/1
- Released worldwide on 3/24/20
- Average daily revenue: \$12,878
- Average daily downloads: 1,158
- View *Vanguard ZERO* on the [App Store](#).



## **Disney Mirrorverse** by Kabam Games

- Classic Disney and Pixar characters have been reimagined for a unique universe and story.
- Combat blends automated and player-controlled, real-time actions (3).
- A branching quest map lets players choose their own paths.

### Launch Information

- Soft-launched on 3/31/20 in Romania, Sweden, Norway, Poland, Denmark, Indonesia and the Philippines
- Average daily revenue: \$5
- Average daily downloads: 77
- View *Disney Mirrorverse* on the [App Store](#).

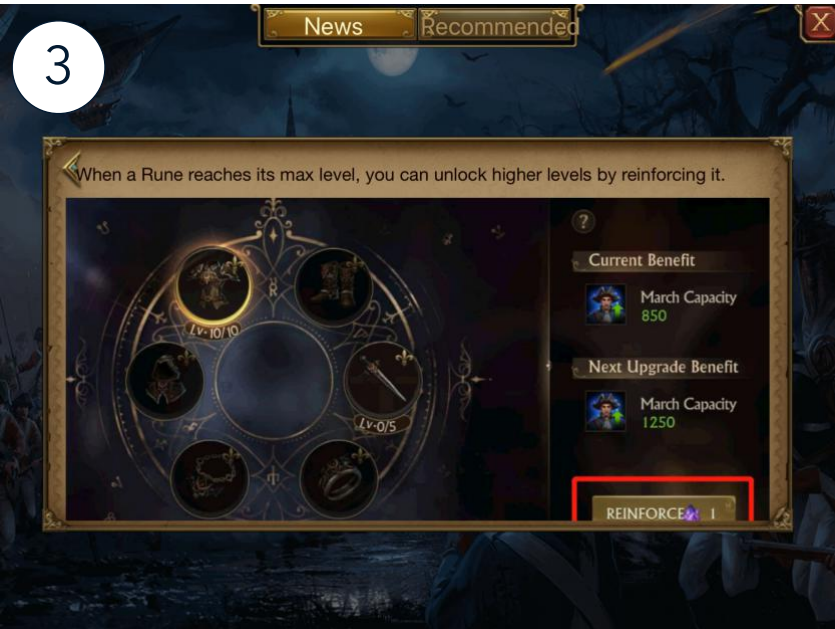
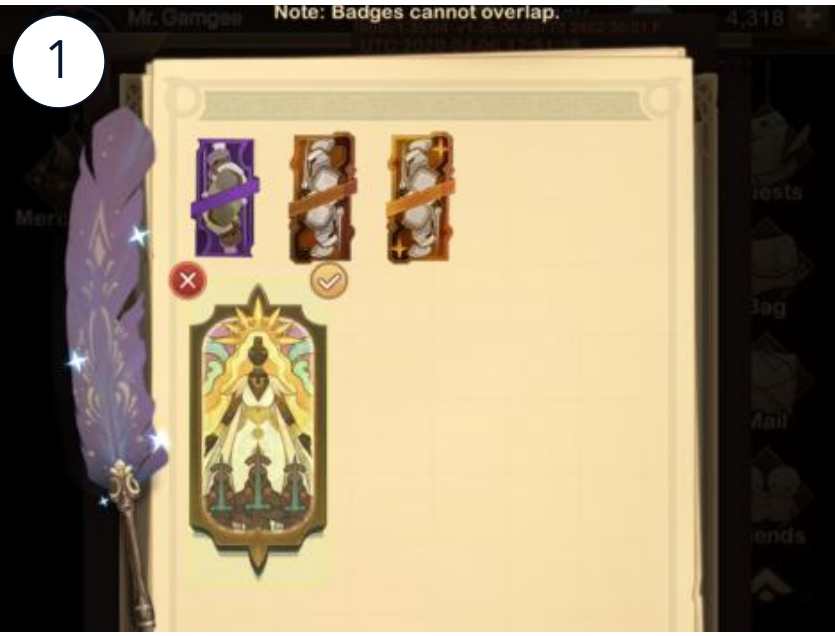
Multi-path maps contributed to a +29% WoW revenue increase in puzzle app *Bingo Bash*'s [Merry Maze](#) expansion feature.





# NOTABLE RELEASES I

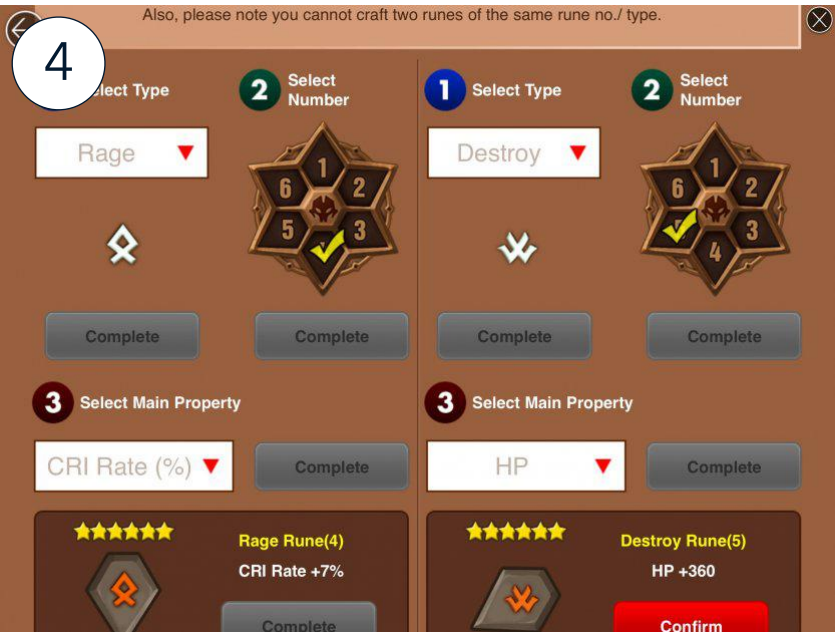
App	Library	Description
AFK Arena	<a href="#">Achievements</a> challenge feature	<ul style="list-style-type: none"><li>Players earn badges and stickers by completing challenges related to upgrading and acquiring heroes (<a href="#">video</a>).</li><li>Stickers and badges can be displayed on an achievement wall visible to other players (<a href="#">1</a>).</li></ul>
	<a href="#">Ukyo Tachibana</a> hero content	<ul style="list-style-type: none"><li>Players get seven free days to play with Ukyo Tachibana—an SNK-licensed hero originally from <i>Samurai Showdown</i> (<a href="#">video</a>).</li><li>Ukyo can be purchased for \$49.99.</li></ul>
BLEACH Brave Souls	<a href="#">Encourage Kon</a> mini-game event	<ul style="list-style-type: none"><li>Players tap the screen to earn points in this rhythm mini-game event (<a href="#">2</a> and <a href="#">video</a>).</li><li>Maintaining 100% “hype” activates guests.</li><li>Guests multiply points for a limited time.</li></ul>
Epic Seven	<a href="#">Epic Seven Re:Birth Update Celebration</a> reward event	<ul style="list-style-type: none"><li>Players earn rewards for logging in, pre-registering for the update, liking the app's Facebook page, and sharing a promotional video on Facebook.</li><li>Returning players who haven't used the app for 16 or more days earn extra login rewards.</li></ul>
Guns of Glory	<a href="#">The Pursuer</a> challenge feature	<ul style="list-style-type: none"><li>Players kill vampires located on the map in individual, alliance, and kingdom missions.</li><li>Challenges and vampires award elixirs that players use to craft and upgrade an exclusive equipment set (<a href="#">3</a>).</li></ul>
King of Avalon: Dragon Warfare	<a href="#">Alliance Siege</a> club event	<ul style="list-style-type: none"><li>The top 20 alliances vote on the start time for a castle conquest event.</li><li>Each alliance chooses two castles to try to capture (<a href="#">4</a>).</li><li>Alliances earn rewards for capturing castles by besieging them for one hour.</li><li>Once a castle is captured, other alliances cannot capture it.</li><li>Alliance leaders randomly receive rewards to give to members who helped capture castles.</li></ul>





# NOTABLE RELEASES II

App	Library	Description
<i>King of Avalon: Dragon Warfare</i>	<a href="#">New Quest System</a> challenge feature	<ul style="list-style-type: none"><li>Two tabs navigate between kingdom challenges and daily challenges.</li><li>Daily challenges award boosts, XP, and activity points.</li><li>Activity points fill a meter for chests at milestones (1).</li></ul>
<i>Rise of Kingdoms</i>	<a href="#">Ian's Ballads</a> club event	<ul style="list-style-type: none"><li>Players choose between five difficulty settings, each with specific unlock requirements.</li><li>Teams of four players complete a series of three boss battles on a map (2).</li><li>Campsites serve as checkpoints and healing stations (video).</li></ul>
<i>Star Trek Fleet Command</i>	<a href="#">Tribble Fool's Day</a> competition event	<ul style="list-style-type: none"><li>Players can collect free Tribbles in refineries.</li><li>Individual and club leaderboards rank players and clubs based on the number of Tribbles collected (3).</li><li>Rewards include event-exclusive hero shards and avatars.</li></ul>
<i>Summoners War</i>	<a href="#">6th Summonersversary</a> collection event	<ul style="list-style-type: none"><li>Cosplay and meme contests award in-app and real-world prizes.</li><li>Event-exclusive purchase bundles include runes, scrolls, gems, grindstones, or hero costumes.</li><li>Players collect event currency by checking-in, watching an event video, collecting crystals, and playing certain game modes.<ul style="list-style-type: none"><li>New players earn bonus currency.</li><li>Event currency can be used to craft runes and purchase grindstones, gems, mystical scrolls, and more (4 and video).</li><li>Players can activate an event store by collecting all 100 mystical scrolls (video).</li></ul></li></ul>
	<a href="#">New Guide Quest</a> mission feature	<ul style="list-style-type: none"><li>Players progress through four sets of missions for rewards (video).</li><li>Missions begin at a new-user difficulty level.</li></ul>



Quickly review all features and events

Filter the [Library Tool](#) by month and year to see all new releases.



# APPENDIX



# PREMIUM PARTNERSHIPS

Liquid & Grit partners with these premier market research and analytics companies to infuse our reports with the most relevant and detailed gaming user personas, data, and statistics available.

Quadrant Strategies	Kinrate Analytics	Sensor Tower
<p><b>Market Research</b> <a href="#">Quadrant Strategies</a></p> <p>Quadrant Strategies is a market research consultancy that uses research to help the world's most prominent technology, gaming, and entertainment companies develop strategies for building their user base, increasing user engagement and spend, and strengthening their marketing and brand plans.</p> <p>We do that using a range of quantitative and qualitative methodologies, including gamer segmentation and persona development, feature testing, message creation, and loyalty and engagement modeling. The work of our senior leadership goes back many years, and includes long-term engagements for console and gaming-PC hardware-makers, individual games in a range of genres, and across consoles, PCs, and mobile, and for some of the top game franchises.</p>	<p><b>Player Personas</b> <a href="#">Kinrate Analytics</a></p> <p>Kinrate Analytics offers game developers, consultants, publishers, and cloud gaming operators the best cross-platform game recommendation engine for targeted marketing, as well as a novel profiling-as-a-service solution for intelligent market segmentation and social networking.</p> <p>Other services include advanced market prediction analyses for identifying emergent gaming trends and access to unique AI-enhanced data of 140 thousand game titles and 48 million game players.</p> <p>The products of Kinrate Analytics have been developed in university-led research projects in collaboration with economists, psychologists, game scholars, and data scientists.</p>	<p><b>Mobile App Store Intelligence</b> <a href="#">Sensor Tower</a></p> <p>Sensor Tower is relied upon by financial analysts, VCs, and publishers who need to leverage data to identify the fastest-growing apps, emerging markets, and more.</p> <p>Clients harness Sensor Tower's suite of app intelligence tools to:</p> <ul style="list-style-type: none"><li>▸ Evaluate app economies and app vitality.</li><li>▸ Drive organic growth with the leading App Store Optimization platform.</li><li>▸ Get the best global download and revenue estimates for the App Store and Google Play.</li><li>▸ Discover top creatives and better shape user acquisition strategy.</li></ul>



# RPG MECHANICS TAXONOMY

Family	Definition
<a href="#">Accelerators</a>	Increases the power, impact, or efficiency of play
<a href="#">Banks</a>	Saves a % of spend that can be unlocked later
<a href="#">Bonuses</a>	Free bonuses given to players (e.g., retention or W2E)
<a href="#">Challenges</a>	Goal-oriented tasks for players to complete
<a href="#">Clubs</a>	Groups that accomplish goals or compete with other groups
<a href="#">Collections</a>	A set of items players collect (often for a completion prize)
<a href="#">Competitions</a>	Players competing against other players
<a href="#">Conflicts</a>	Players engaging in battle with their characters
<a href="#">Cosmetics</a>	Improvements or updates to the app or a feature
<a href="#">Currencies</a>	Changes to currencies, economies, stores, and items
<a href="#">Custom Design</a>	Options to customize aesthetics
<a href="#">Expansions</a>	Additional rooms, worlds, play modes, VIP lounges, etc.
<a href="#">Flows</a>	Specific flows, like the NUX, ratings, and surveys

Family	Definition
<a href="#">Hazards</a>	Level elements/blockers that make levels more difficult
<a href="#">Interactions</a>	Social features with direct or indirect interaction
<a href="#">Leaderboards</a>	Stand-alone leaderboards
<a href="#">Levels</a>	Anything to do with leveling
<a href="#">Mini-Games</a>	Smaller, shorter games within a game (e.g., scratcher cards)
<a href="#">Missions</a>	Linear sets of tasks that players must complete
<a href="#">Notices</a>	Feature or product announcements
<a href="#">Other</a>	Miscellaneous features and outliers
<a href="#">Profiles</a>	Players' setups, profiles, settings, and controls
<a href="#">Purchases</a>	Anything to do with purchases
<a href="#">Quests</a>	Tasks that players complete to progress along a map
<a href="#">Rewards</a>	Rewards players receive for engagement or spend (other than those in the bonuses family)

*"It is important to draw wisdom from many different places. If you take it from only one place, it becomes rigid and stale."*

*– Uncle Iroh, Avatar: The Last Airbender*

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