LIQUID&GRIT

RPG REPORT

Competitive Research and Actionable Product Recommendations

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JUNE

2020

REVENUE DRIVER

Product data, research, and recommendations for revenue-driving releases.
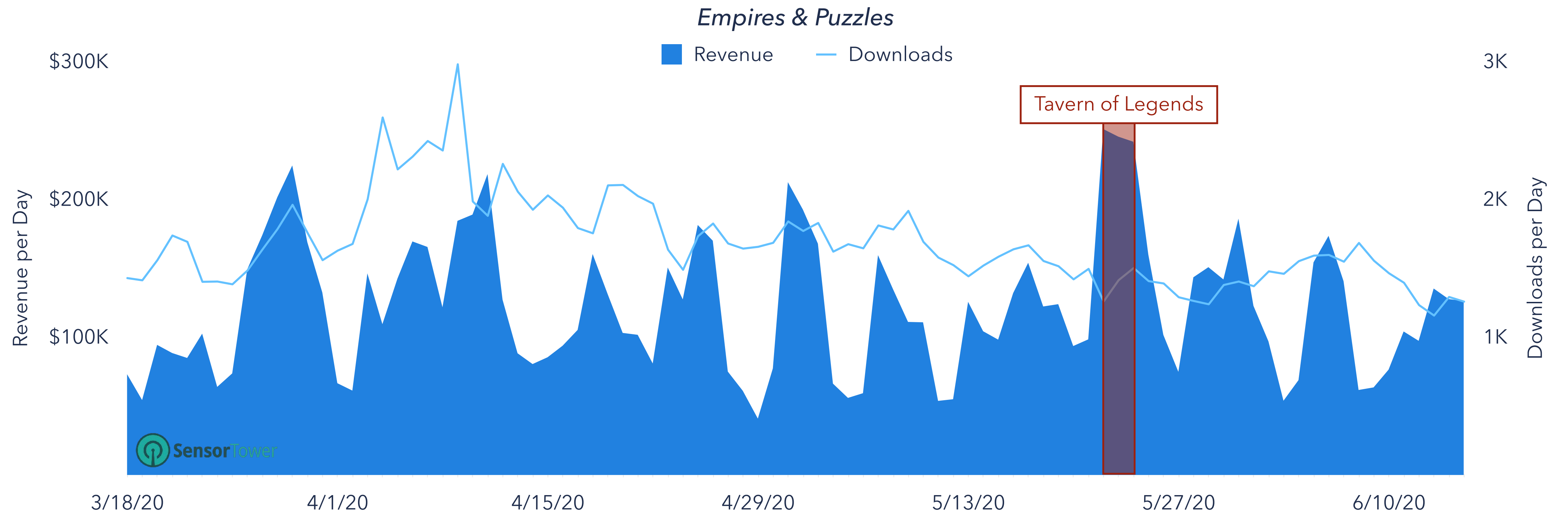
Hero-Restricted Mission Event

Tavern of Legends in *Empires & Puzzles*

REVENUE ANALYSIS

After the launch of Tavern of Legends, *Empires & Puzzles*' revenue was +92% and downloads were -15% 3Do3D compared to the same days from the previous week.

See the Appendix for a full release schedule and details on IAP changes.

Empires & Puzzles

■ Revenue — Downloads

Tavern of Legends

Graph data is iOS U.S. only.

3Do3D = 3 days compared to the same 3 days from the previous week.
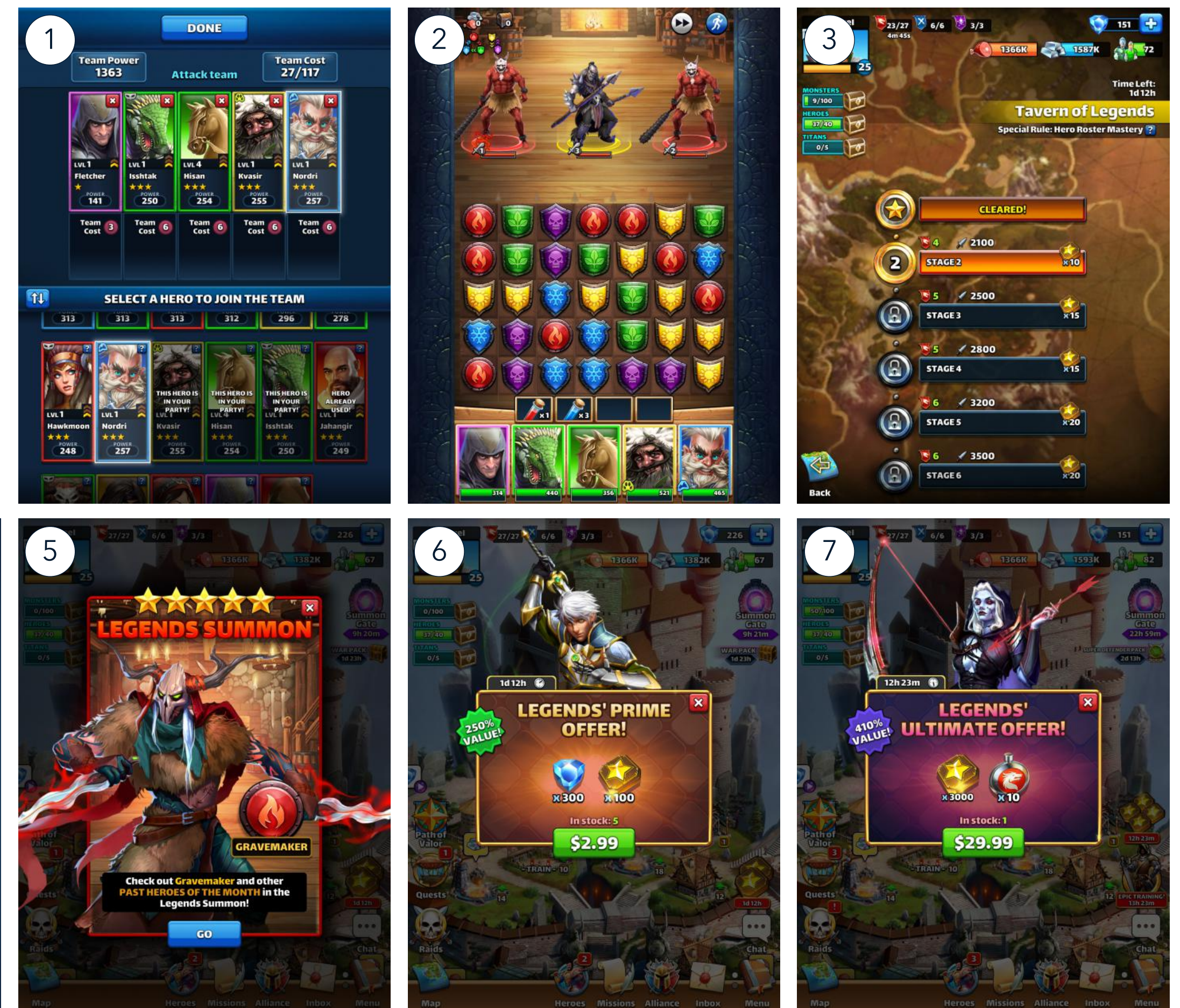
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FEATURE TEARDOWN

During this 10-stage mission event, heroes can only be used once. Players can spend an event currency to purchase rare summons.

Details
- Players complete 10 increasingly difficult mission stages.
- Players can use up to five heroes for each stage (1 and 2).
  - Each hero can only be used once for the entire event.
- Stages award items and legends coins, an event currency (3, 4, and video).
  - Legends coins can be used to purchase rare summons (5).
- For the first two days of the event, an IAP offers 100 legends coins for $2.99 (6).
- On the last day of the event, a new IAP offers 3,000 legends coins for $29.99 (7).

Additional Information
- See the Tavern of Legends Library for more images and videos.

PRODUCT INSIGHTS

Increase purchases by making players dig deep into hero collections, and use constraints to design compelling challenges.

- **Events that require a deep roster of heroes drive revenue.** The 10 missions in Tavern of Legends require up to 50 heroes, incentivizing players to expand their hero collections through purchasable summons. In another revenue-driving event, *Star Wars: Galaxy of Heroes'* Clash on Kamino used different sets of heroes as prerequisites for each stage of the event, leading to a +72% WoW and +40% 2Wo2W revenue increase ([1]).

- **Constraints can lead to greater engagement both during and after events.** Research shows that people engage more actively with problems and find more solutions when they are denied the path of least resistance.[1] In Tavern of Legends, players can only use each hero once, pushing them to think creatively and plan carefully in order to complete the progressively more difficult stages ([2]).

  These restrictions can continue to increase engagement *even after they are removed*. In one study, subjects that were given a maze game with fewer exits worked more actively and, once constraints were lifted, continued to find more solutions than the control group.[2] Because of this effect, players may continue to engage more enthusiastically with their team builds even after Tavern of Legends has ended.

- **Promoting a sale and then immediately superseding it with a much better deal may leave players feeling manipulated**—and could even train them to not make purchases at the start of events. For the first two days of Tavern of Legends, a sale offered 33 event tokens per dollar. On the final day, a new sale offered 100 event tokens per dollar. Sales tactics that rely on incomplete information may be perceived as deceptive, potentially damaging user loyalty and making subsequent sales less effective.[3]

  Instead, consider using different currencies, boosts, and gamified sale mechanics to increase the value of subsequent sales. In casino, *Slotomania* released a series of sales during a live ops event week that included an IAP boost, a progressive sale, a secondary currency sale, a primary currency sale, and finally a wheel spin that was added to each purchase. Revenue was +25% WoW for the week.

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[1] Creating When You Have Less: The Impact of Resource Scarcity on Product Use Creativity

[2] Variability, Constraints, and Creativity, p. 356

[3] The Effects of Scarcity Appeal on Product Evaluation: Consumers' Cognitive Resources and Company Reputation
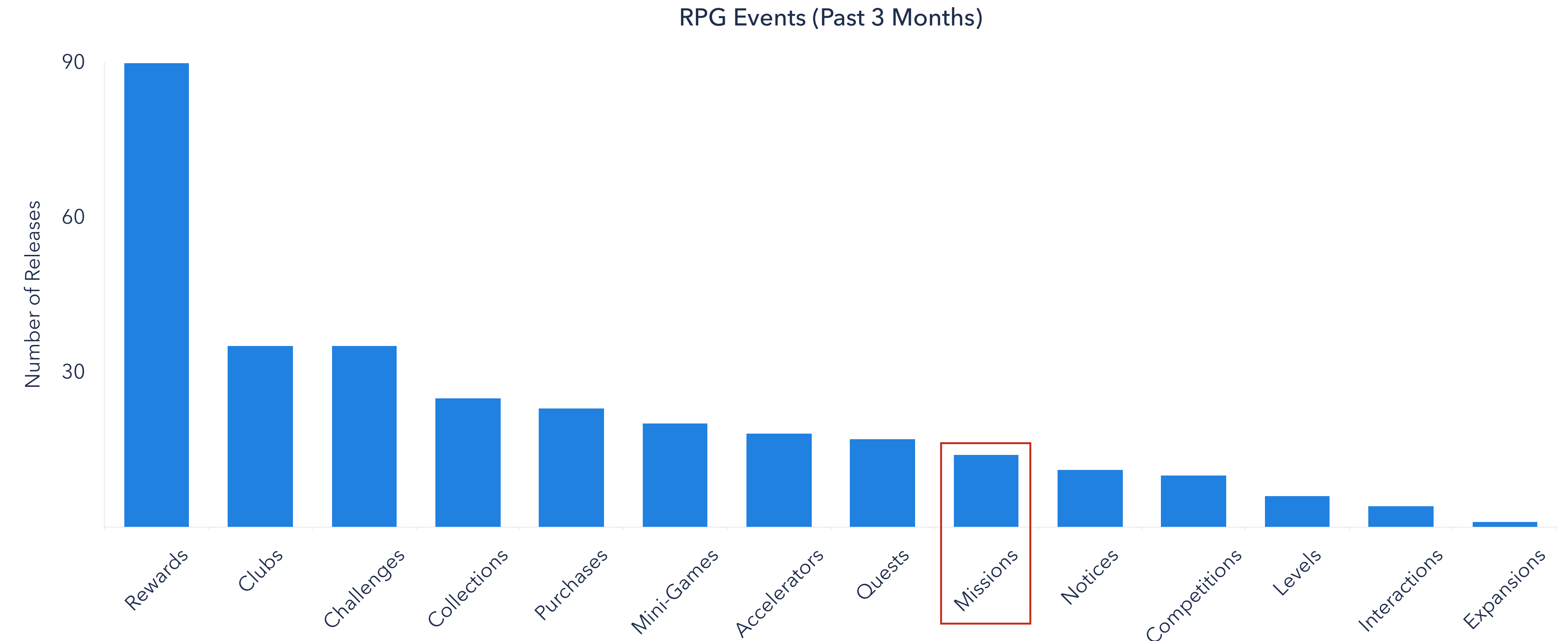
PRODUCT TRENDS

Investment trends for event or feature releases.

Tracked RPG apps:

AFK Arena, BLEACH Brave Souls, Dragon Ball Legends, Empires & Puzzles, Epic Seven, Final Fantasy XV: A New Empire, Fire Emblem Heroes, Guns of Glory, King of Avalon: Dragon Warfare, Last Shelter: Survival, Lords Mobile: War Kingdom, MARVEL Strike Force, RAID: Shadow Legends, Rise of Kingdoms, Star Trek Fleet Command, Star Wars: Galaxy of Heroes, Summoners War

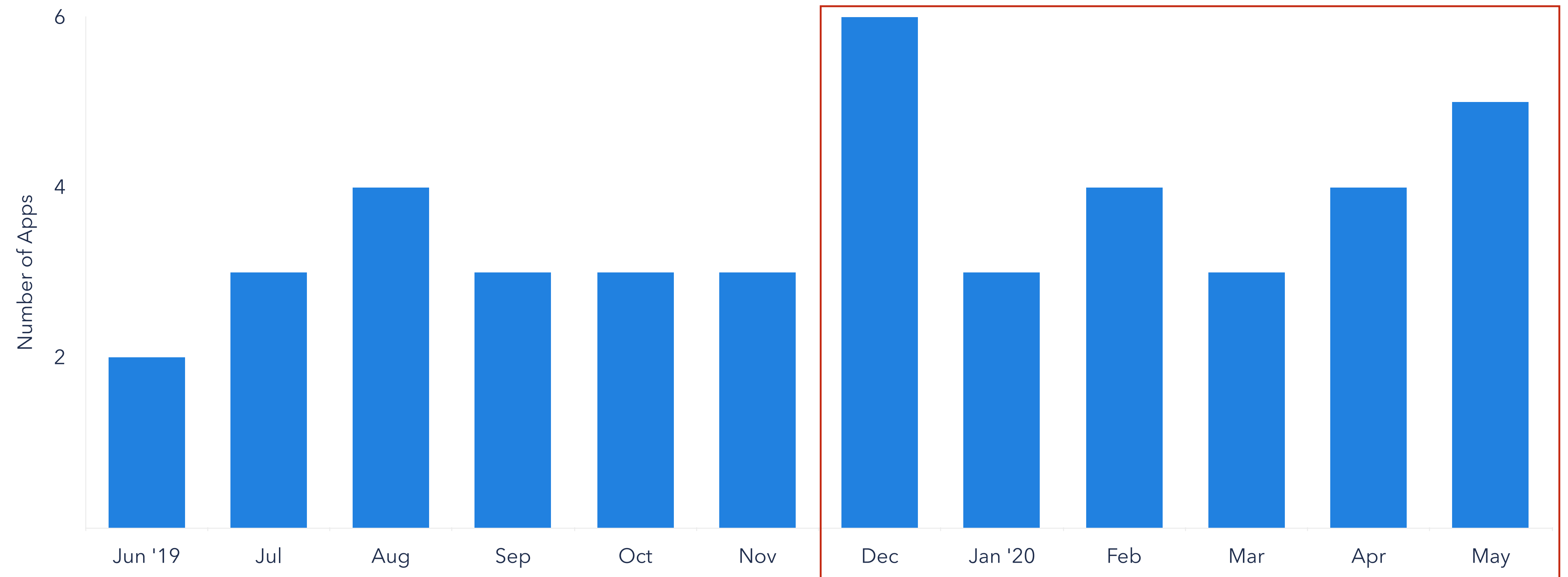# MISSION EVENTS REPRESENT AN OPPORTUNITY FOR RPGs

Mission events are not frequently released by tracked RPG apps, making up just 5% of events.

RPG Events (Past 3 Months)

MORE RPGS RELEASING MISSION EVENTS IN 2020

During the past six months, an average of 4.2 tracked apps released mission events each month. This is a +39% increase over the preceding six months, which saw an average of 3 tracked apps with mission event releases per month.
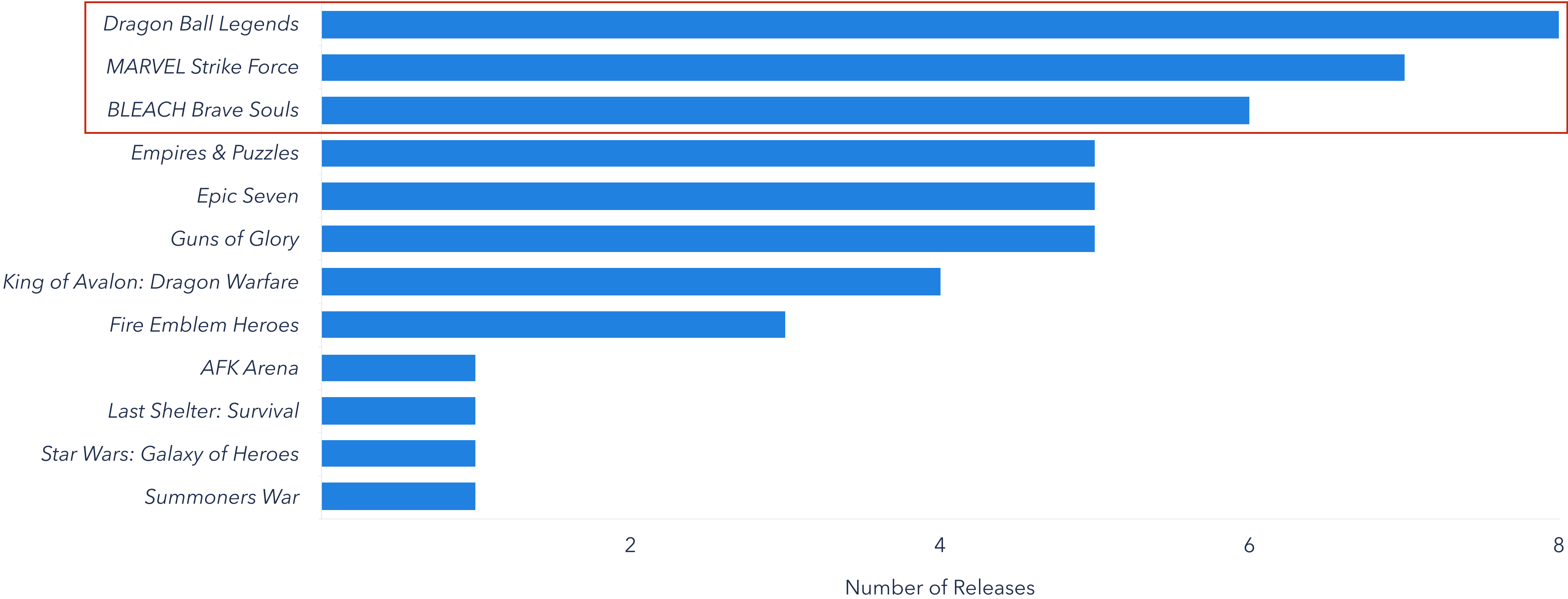
RPG Apps with Mission Event Releases
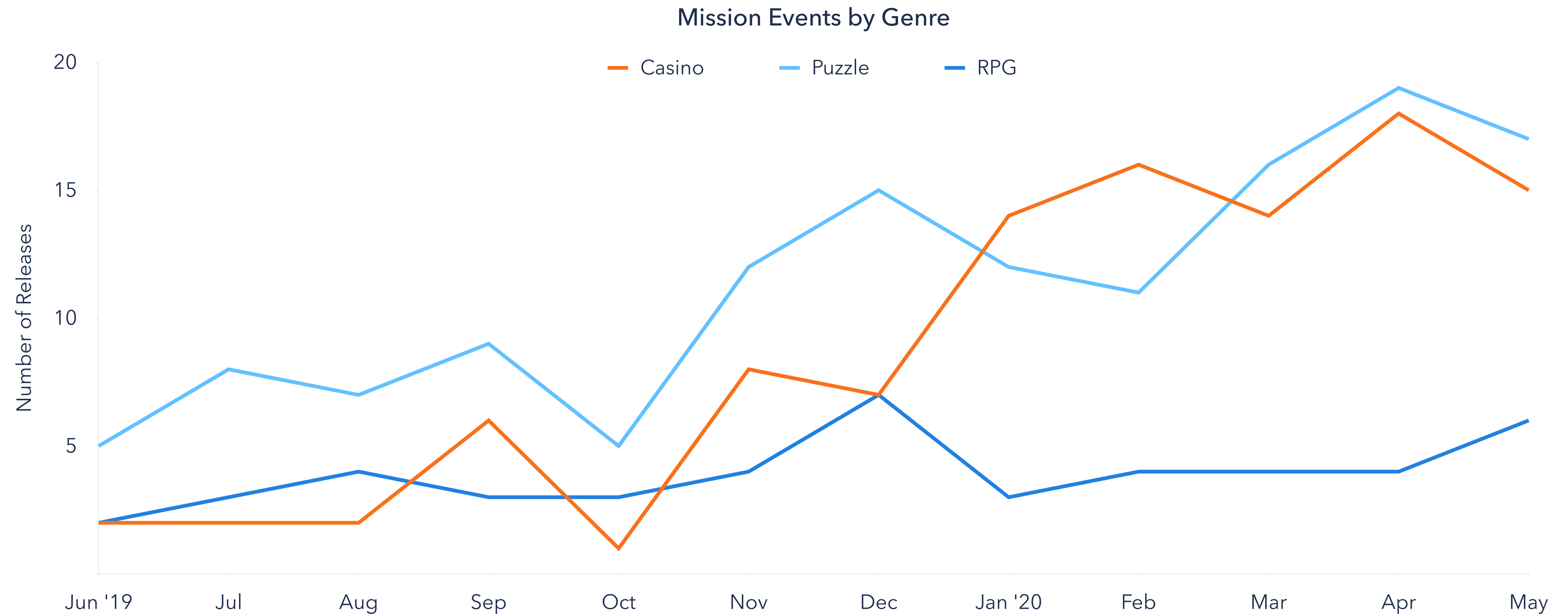

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THREE APPS RELEASE NEARLY HALF OF ALL MISSION EVENTS

Dragon Ball Legends, *MARVEL Strike Force*, and *BLEACH Brave Souls* account for 45% of all mission events released by tracked RPG apps in the past year.

Mission Events by App (Past 12 months)

App	Number of Releases
Dragon Ball Legends	8
MARVEL Strike Force	7
BLEACH Brave Souls	6
Empires & Puzzles	5
Epic Seven	5
Guns of Glory	5
King of Avalon: Dragon Warfare	4
Fire Emblem Heroes	3
AFK Arena	1
Last Shelter: Survival	1
Star Wars: Galaxy of Heroes	1
Summoners War	1

Number of Releases

RPG Sees the Smallest Increase in Mission Events

Mission event releases are growing more slowly in RPGs than in casino and puzzle apps.

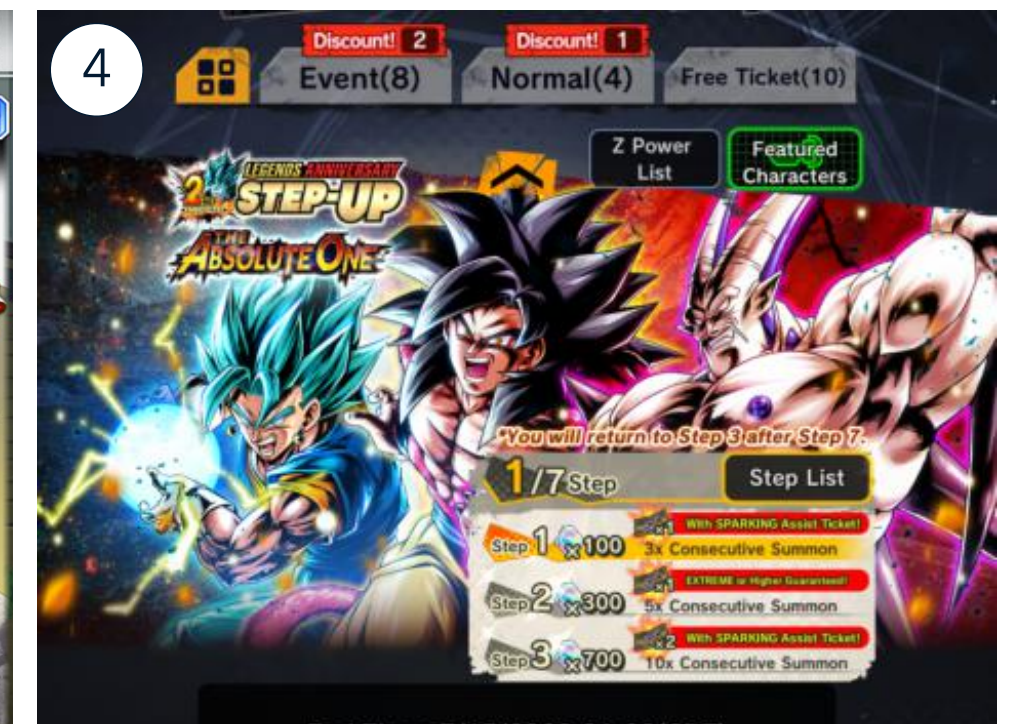Mission Events by Genre

— Casino — Puzzle — RPG

New Content

New heroes, equipment, and abilities.

CONTENT RELEASES I
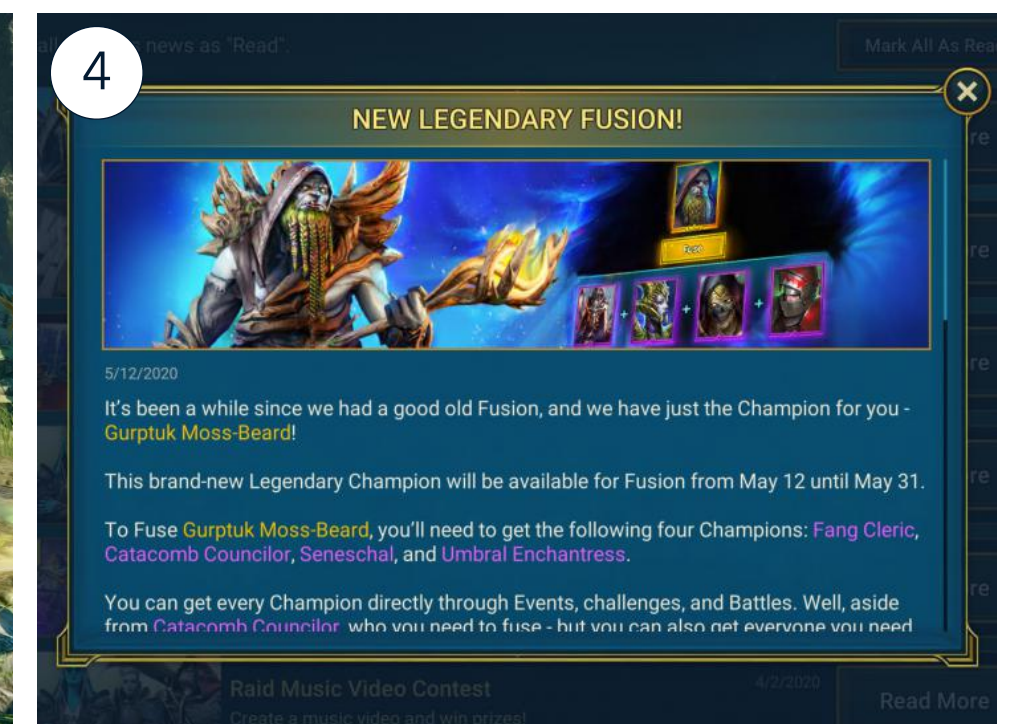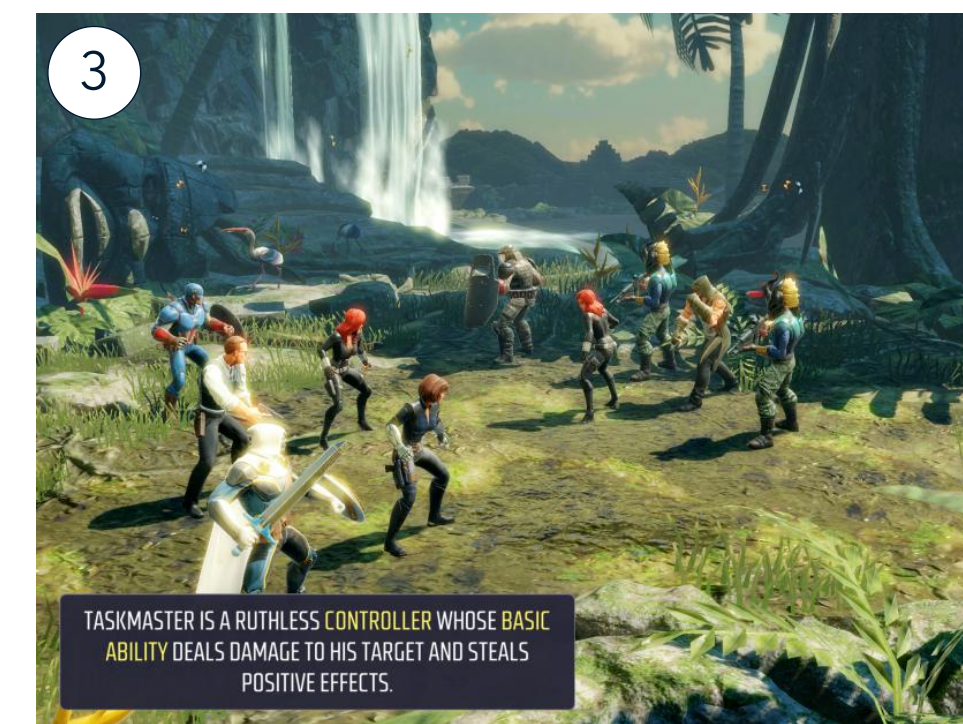
RPG > Content > Abilities, Equipment, and Heroes

5/11: Saurus — *AFK Arena* hero (1)
5/25: Torne — *AFK Arena* hero (2)
5/16: Double-Team Characters — *BLEACH Brave Souls* abilities
5/16: Redux Summons: Night of Wijnruit — *BLEACH Brave Souls* heroes
5/31: CFYOW Round 7 — *BLEACH Brave Souls* heroes (3)
5/13: Just hang in a little longer Piccolo! — *Dragon Ball Legends* equipment
5/20: Awakened I'll Turn You Both into Scrap! No. 1 — *Dragon Ball Legends* equipment
5/27: Battle of Saiyans — *Dragon Ball Legends* equipment
5/31: 2nd Anniversary Characters — *Dragon Ball Legends* heroes (4)
5/19: May 2020 Balance Update — *Empires & Puzzles* abilities
5/18: Costume Chamber Update — *Empires & Puzzles* equipment
5/4: Clarissa — *Empires & Puzzles* hero
5/22: Margaret — *Empires & Puzzles* hero (5)
5/28: New Season III Heroes — *Empires & Puzzles* heroes
5/14: Ms. Confille — *Epic Seven* equipment
5/21: Doctor's Bag — *Epic Seven* equipment
5/28: Two New Exclusive Equipment — *Epic Seven* equipment
5/14: Blood Moon Haste — *Epic Seven* hero (6)
5/14: Elphelt Valentine — *Epic Seven* heroes
5/21: Ray — *Epic Seven* hero

CONTENT RELEASES II

RPG > Content > Abilities, Equipment, and Heroes

5/6: Weapon Refinery Update – *Fire Emblem Heroes* abilities
5/8: Dark Burdens – *Fire Emblem Heroes* heroes (1)
5/9: Ashnard: Mad King – *Fire Emblem Heroes* hero
5/10: Hector: General of Ostia – *Fire Emblem Heroes* hero
5/20: Bridal Beloveds – *Fire Emblem Heroes* heroes
5/22: Hinata: Samurai Groom – *Fire Emblem Heroes* hero
5/25: Sanaki: Begnion's Apostle – *Fire Emblem Heroes* hero
5/29: Mila: Goddess of Love – *Fire Emblem Heroes* hero (2)
5/11: Torrent Set – *King of Avalon: Dragon Warfare* equipment
5/6: Abilities Enhancements – *MARVEL Strike Force* abilities
5/6: Thanos Empowered Update – *MARVEL Strike Force* ability
5/6: Taskmaster – *MARVEL Strike Force* hero (3)
5/15: Cull Obsidian – *MARVEL Strike Force* hero
5/26: Ebony Maw – *MARVEL Strike Force* hero
5/6: Champion Rebalance – *RAID: Shadow Legends* abilities
5/12: Gurptuk Moss-Beard – *RAID: Shadow Legends* hero (4)
5/6: 6 of 10 - Kras – *Star Trek Fleet Command* hero (5)
5/20: Rebel Y-wing – *Star Wars: Galaxy of Heroes* hero (6)

MARKET WATCH

New apps and notable releases from established competitors.

SOFT-LAUNCH APPS

Puzzle Breakers by Playrix

App Details
- Match-3 levels include enemies that move, vary attacks, and use obstacles as shields (1).
- Players can level heroes and customize their equipment (2).

Launch Information
- Soft-launched 5/1/20 in the Philippines on Android
- Average daily revenue since launch: $2
- Average daily downloads since launch: 379
- View *Puzzle Breakers* on Google Play.

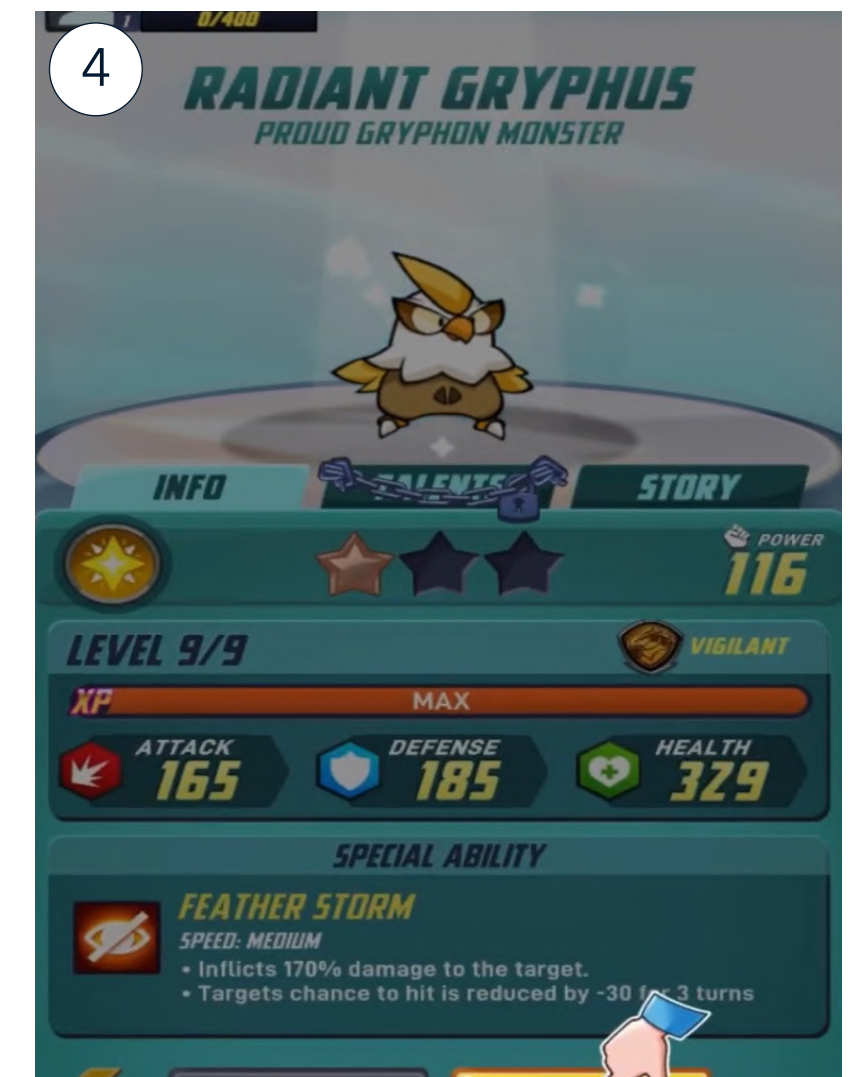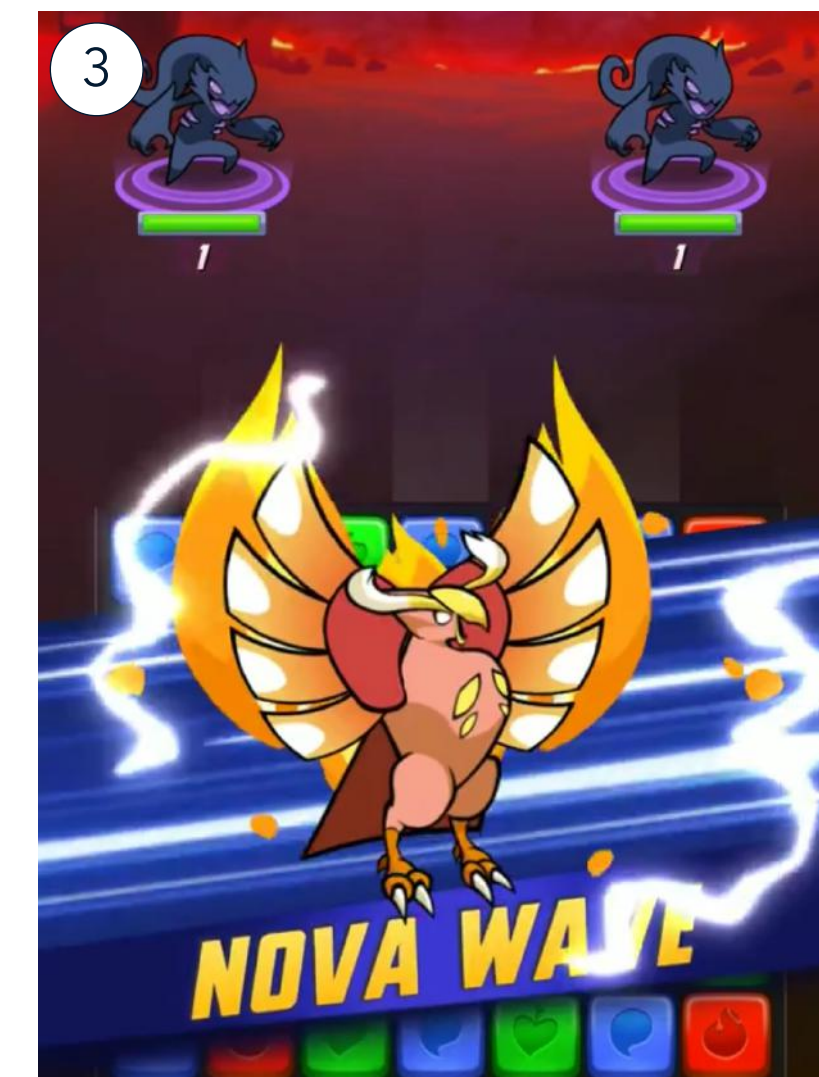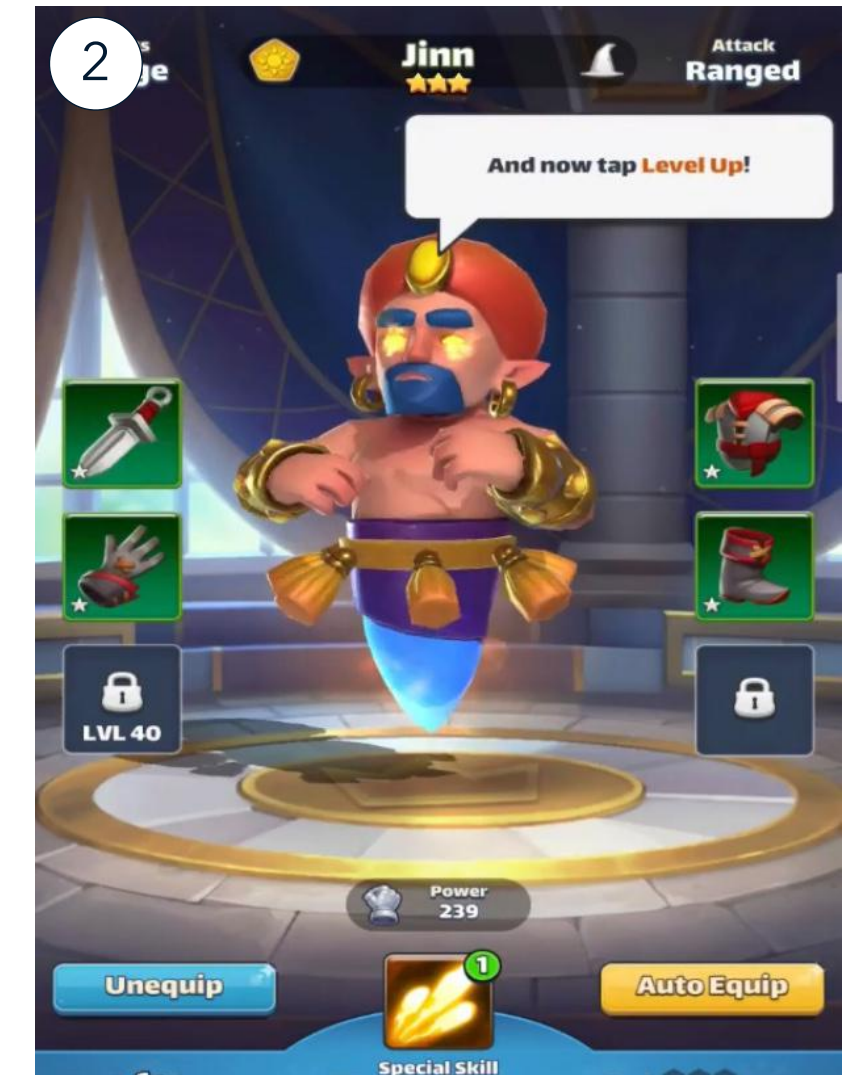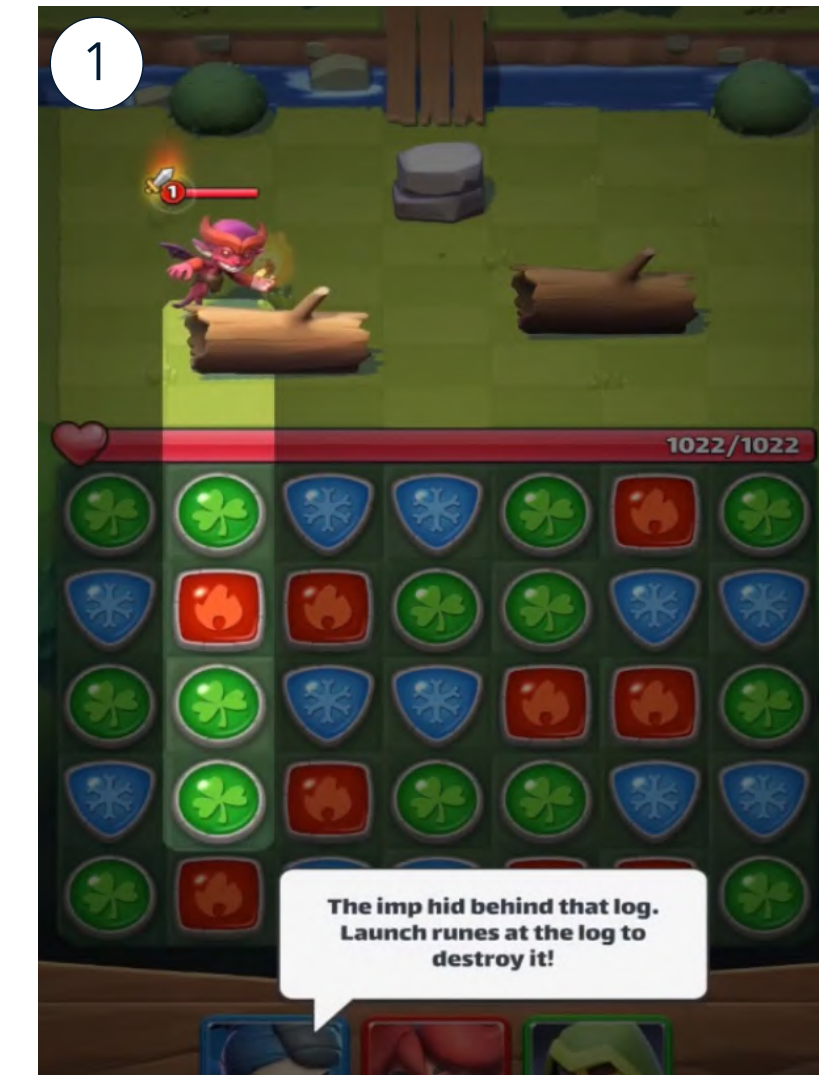## *Phoenix Rangers: Puzzle RPG* by Rovio

App Details
- This match-3 RPG uses a Pokémon-esque monster collection and leveling system (3).
  - Monsters have unique abilities and stats (4).
- A hub world lets players construct and upgrade buildings.
- Levels have a three-medal scoring system similar to Rovio's *Angry Birds* franchise.

Launch Information
- Soft-launched on Android 11/25/19 in Finland and 12/7/19 in the US, the Philippines, Brazil, and Hong Kong
- Average daily revenue since launch: $452
- Average daily downloads since launch: 1,359
- View *Phoenix Rangers: Puzzle RPG* on Google Play.

[4] Materialising Digital Collecting: An Extended View of Digital Materiality, p. 30

Create deeper connections to collectible items by surfacing metadata—like date acquired, battles won, or total damage. This gives monsters, pets, and equipment unique biographies for each player.[4]

BREAKOUT APP

Dragon Raja by Archosaur Games

App Details
- Players can customize their characters and in-game homes (1 and 2).
- A 3D open world incorporates real landmarks from around the globe (3).
- Player choices affect quests and NPC dialogue.
- Promotional materials highlight the use of Unreal Engine 4 and promise "the feel of playing a PC game!"
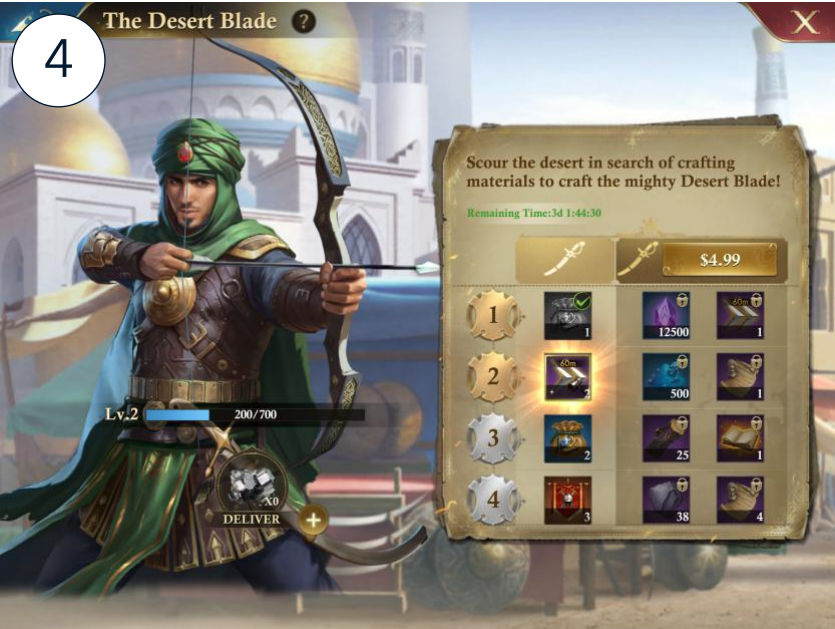
Launch Information
- Released worldwide on 2/29/20
- 33rd highest-grossing RPG as of 6/1/20
- Average daily revenue (US, past 90 days): $45,803
- Average daily downloads (US, past 90 days): 4,516
- View *Dragon Raja* on the App Store.

NOTABLE RELEASES I

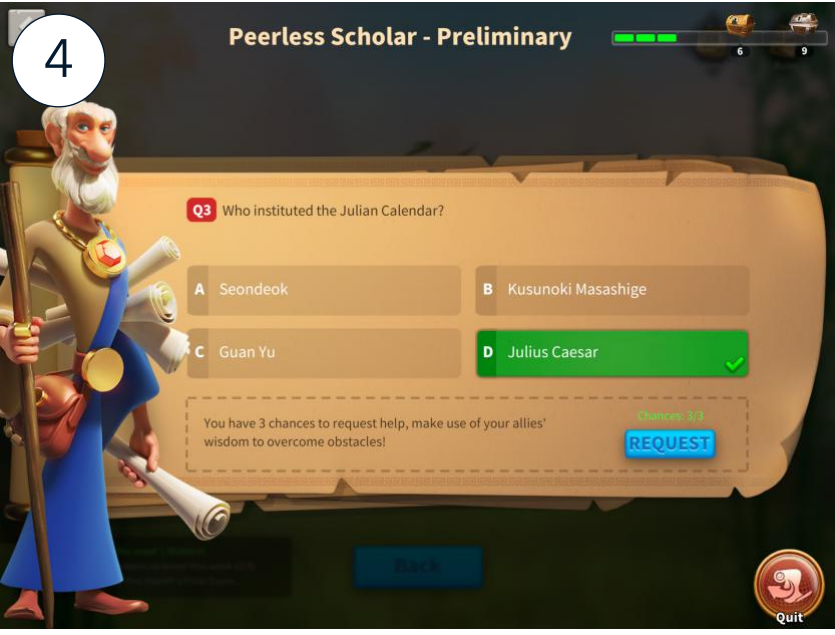| App	Library	Description
AFK Arena	Advancement Rewards purchase feature	• A $19.99 purchase adds diamond rewards to five campaign chapters (1).
	The Abyssal Expedition: Vault of Time club event	• Players team up to capture tiles on a map by defeating enemies. • Captured tiles can be cultivated for strength-increasing relics (video). • Challenges increase player ranks. • Ranks increase the capacity for heroes, relic levels, and owned tiles (video). • Defeating bosses unlocks additional tiles (2).
Dragon Ball Legends	Legends Friends interaction feature	• Players invite friends to the feature via a scannable code. • Invited accounts must be less than seven days old. • Inviters earn rewards based on the number of times invitees claim challenge rewards (3).
Guns of Glory	The Desert Blade mission event	• Players defeat enemies or raid Red Guard camps to earn torches. • Torches are used to explore mines and collect desert ore. • Desert ore can also be purchased. • Desert ore increases friendship levels with the Desert Warrior for rewards. • A $4.99 IAP unlocks two extra tiers of rewards (4 and video).

NOTABLE RELEASES II

App	Library	Description
King of Avalon: Dragon Warfare	**Friendship Star** competition event	• Players complete challenges or make purchases to earn gifts (1). • Gifts can be sent to other players. • Two leaderboards rank players based on the number of gifts given or received (video).
MARVEL Strike Force	**VS Battle** competition feature	• Players take turns choosing five heroes for timed 1v1 matches. • Each opponent bans two heroes from participating and chooses one hero from the other's roster to be replaced (2 and video). • Players win by defeating all enemy heroes or having the most heroes when the timer expires.
Rise of Kingdoms	**Lucky Dice** mini-game event	• Players spend gems to roll two dice. • Dice sums that fall within a specific range advance players one step on a reward progression. • Players can leave with their current reward or continue playing (3 and video). • When dice sums are outside the range, players can spend more gems to try again.
	Peerless Scholar mini-game feature	• Players answer history, sociology, and gameplay questions in three exam stages (4 and video). • Correctly answering 6 out of 10 questions on a preliminary exam unlocks that week's midterm. • Players can request help from club members on three preliminary exam questions. • Correctly answering all 15 questions on a midterm unlocks that month's final exam.
Star Trek Fleet Command	**Alliance Celebration** club event	• Players earn club points by contributing resources to their club. • Clubs compete on a leaderboard to get the most points in 48 hours (video).

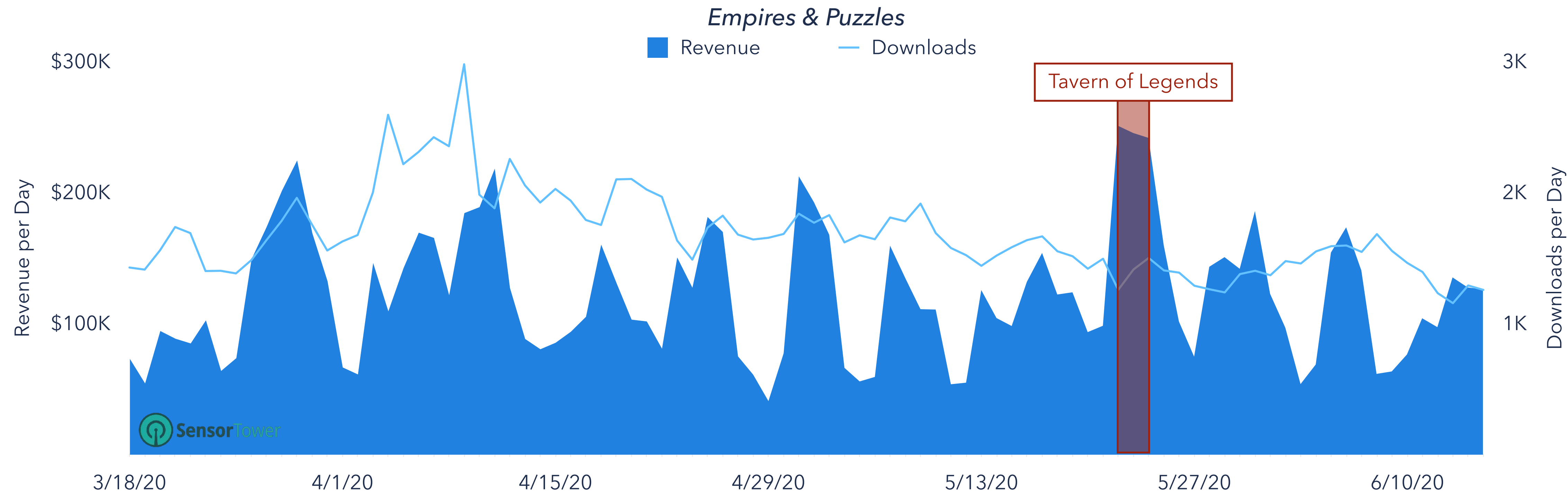| Quickly review all features and events |
|---|
| Filter the Library Tool by month and year to see all new releases. |

APPENDIX

EMPIRES & PUZZLES RELEASE SCHEDULE

Releases	

4/6–5/25: Path of Valor mission feature
5/22:
  • $2.99 Legends' Prime Offer! IAP to #3 (NPL)
  • $2.99 Challenge Offers - Day 2 IAP moved +3 to #6
5/22: Margaret hero content
5/22–5/23: Legends' Prime Offer! purchase event
5/22–5/24: Tavern of Legends mission event
5/23: Sacred Treasure Elemental Offer purchase event
	5/24: Legends' Ultimate Offer! purchase event
	5/24: Tournament Offer purchase event
	5/25:
	  • $29.99 Barrel of Gems IAP moved +1 to #6
	  • $99.99 Mountain of Gems IAP moved +1 to #8
	  • $2.99 Challenge Offers - Day 4 IAP to #9 (NPL)
	5/25–5/26: Choose Your Ascension! purchase event
	NPL = Not previously listed

Empires & Puzzles

■ Revenue — Downloads

Tavern of Legends

Graph data is iOS U.S. only.

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

Market Research
Quadrant Strategies

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.

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.

Player Personas
Kinrate Analytics

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.

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.

The products of Kinrate Analytics have been developed in university-led research projects in collaboration with economists, psychologists, game scholars, and data scientists.

Mobile App Store Intelligence
Sensor Tower

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.

Clients harness Sensor Tower's suite of app intelligence tools to:

- Evaluate app economies and app vitality.
- Drive organic growth with the leading App Store Optimization platform.
- Get the best global download and revenue estimates for the App Store and Google Play.
- Discover top creatives and better shape user acquisition strategy.

RPG MECHANICS TAXONOMY

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

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

"Focus solely on your goal, regardless of your surroundings. Be in the now. Set up and draw. Inhale and prepare for what you are about to do."

– Hawkeye, *Hawkeye & Mockingbird #3*

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