



LIQUID&GRIT

RPG REPORT

Competitive Research and Actionable Product Recommendations

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JULY

2020

REVENUE DRIVER



Product data, research, and recommendations for revenue-driving releases

RPG > FEATURES > MINI-GAMES

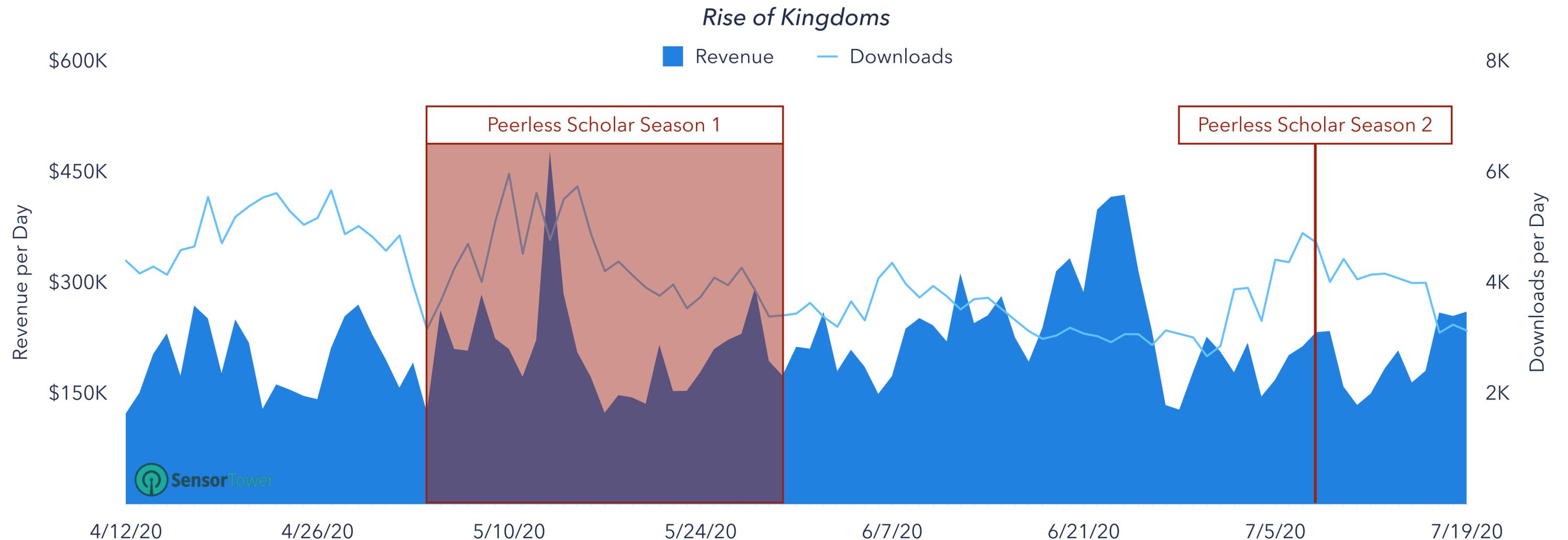
TRIVIA MINI-GAME SEASON

Peerless Scholar Season 1 in *Rise of Kingdoms*

REVENUE ANALYSIS

Rise of Kingdoms' revenue was +20% and downloads were -8% MoM after the initial launch of Peerless Scholar. The second season of Peerless Scholar, which launched on 7/8, does not yet have complete revenue data.

See the [Appendix](#) for a full release schedule and details on IAP changes.



Graph data is iOS U.S. only.
MoM = Month over month

FEATURE TEARDOWN

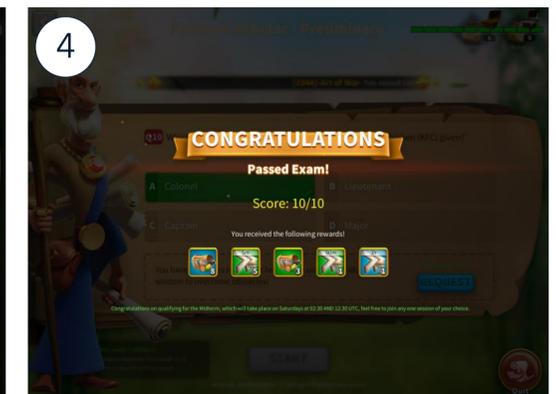
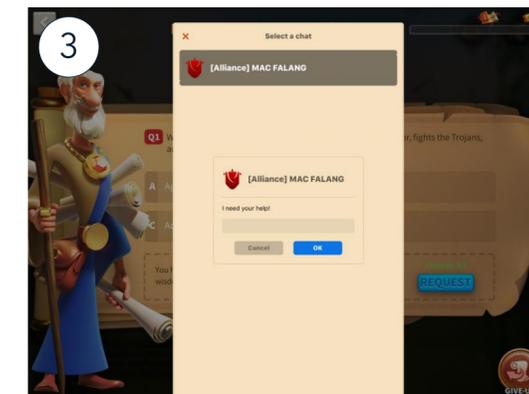
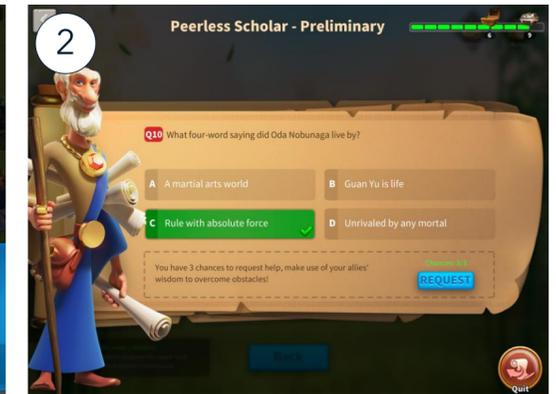
Players progress through three tiers of quizzes in a trivia mini-game season.

Details

- A new building, the Lyceum of Wisdom, grants access to a trivia mini-game (1).
- Three tiers of quizzes—preliminary quizzes, midterms, and final exams—cover world history and game mechanics.
- Preliminary quizzes have 10 questions and can be taken once per weekday (2 and [video](#)).
 - Players can ask alliance members for help up to three times per preliminary quiz (3).
 - Correctly answering 6 out of 10 questions unlocks that week's midterm.
 - Correctly answering 9 out of 10 questions awards a life token for the midterm.
 - Players can collect up to three life tokens for each midterm.
 - Preliminary quizzes award chests at 6 and 9 correct answers (4).
- Midterms have 15 timed questions and are available in two time slots on Saturdays (5).
 - As questions progress, the length of timers decreases from 15 to 10 seconds (6).
 - Each wrong answer or expired timer uses a life token, though questions that use life tokens still count as correct (7).
 - The quiz ends when players get a question wrong with no life tokens remaining.
 - Midterms award prizes at 5, 10, and 15 correct answers.
 - Players also earn alliance awards at 10 and 15 correct answers.
 - Answering all 15 questions correctly unlocks a final exam at the end of the season (8).
- The final exam occurs on the last Saturday of the month in a single time slot.
 - Final exams are structured the same as midterms, but each participant automatically gets three life tokens.

Additional Information

- See the [Peerless Scholar](#) Library for more images and videos.



PRODUCT INSIGHTS

Narratives motivate play and create long-lasting goals.

Peerless Scholar uses a few simple but effective narrative devices to frame the mini-game. In order to participate, players must first construct and visit a new building, the Lyceum of Wisdom, which grounds the feature in the game world (1). Then, the progression of preliminary, midterm, and final exams—complete with scheduled time slots—adds further immersion by mimicking a real academy.

Story is more than just window dressing. In our study of 1,415 RPG players, immersion was tied with achievement for the most significant player motivation,¹ and story elements made up four of the five most commonly cited reasons for continuing to play.²

Narrative serves a functional purpose, too: Research has found that priming goals with a narrative improves retention, increasing goal completion after a delay by 21%.³

For another example of a mini-game narrative, look at puzzle app *Best Fiends*' [Music Festival](#) scavenger hunt event, which increased revenue +8% WoW. In this event, players had to find music gear hidden around the app so a rockstar could play a concert (2). This simple story both justified the mini-game's mechanics and introduced a new unlockable character.

Timers increase flow and prevent cheating in trivia features.

Trivia game designers face a challenge in that players can just look up answers online. Peerless Scholar solves this by adding progressively shorter timers to questions on the midterm and final exams.

Research has shown that time pressure can also increase the experience of flow in video games—a highly pleasurable state that occurs when players face a challenge that matches their skill level.⁴ Perhaps surprisingly, players who ran out of time reported the greatest increase in flow and engagement, even compared to those who succeeded within the time limit.

Timed mini-game events have driven revenue for *Rise of Kingdoms* before. In [Picking Up Pieces](#), players earned rewards for manually assembling timed jigsaw puzzles. This series of events saw substantial revenue growth, averaging +59% across four releases.



¹ [Liquid & Grit RPG Personas Report](#), p. 4

² *Ibid.*, p. 10

³ [Narratives and Goals: Narrative Structure Increases Goal Priming](#)

⁴ [Time Pressure as Video Game Design Element and Basic Need Satisfaction](#), p. 24 & 33

PLAYER INSIGHTS

Trivia fans want questions based on real knowledge.

Many trivia mini-games focus exclusively on game lore and mechanics, but Peerless Scholar stands out by quizzing players on real-world history (1). According to one player we interviewed about the feature, "Whoever wrote [those questions] understands the player base, because there are historical elements that are central to [Rise of Kingdoms], and players really like that."⁵

While trivia may not be for everyone, it's still quite popular—particularly during lockdown. The highest-grossing trivia app on iOS, *Who Wants To Be a Millionaire*, has seen U.S. monthly revenue more than double since the beginning of social distancing measures, from \$218,397 in February to \$492,922 in May.

Relying too heavily on in-game knowledge may alienate the trivia fans who are most likely to enjoy the feature. Instead, ask questions about real-world subjects relevant to the game's theme.

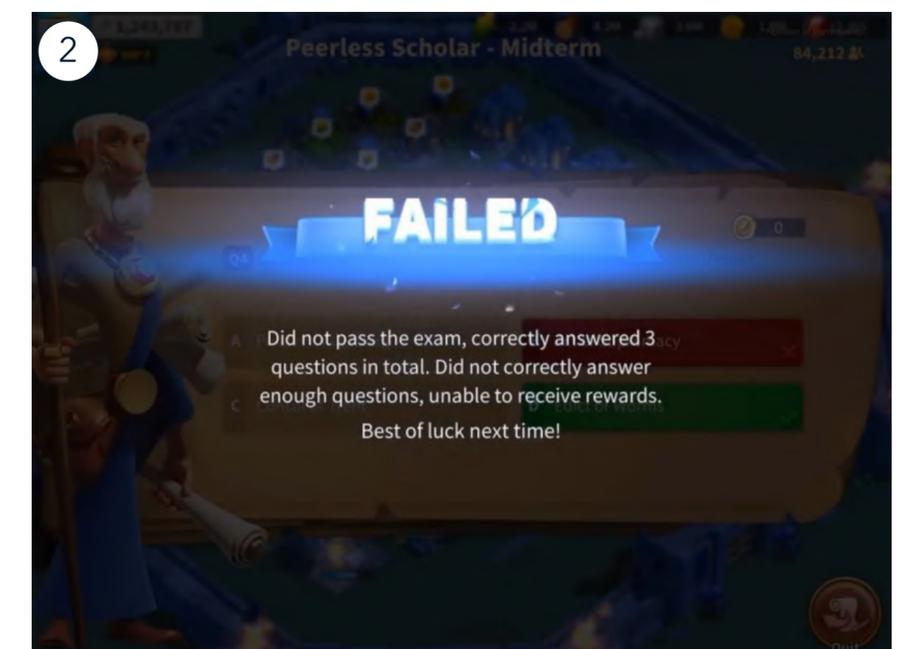
Players who like challenges don't mind failing.

In addition to some legitimately hard history questions, Peerless Scholar cranks up the difficulty as players progress by adding timers, removing lifelines, and requiring perfect scores to unlock final exams. Asked about this, that same Peerless Scholar player responded, "If you can't fail, there is no challenge."

Challenge-driven players, like Andrew Achievement, have a strong preference for thought-provoking mini-games—and are not afraid of failure.⁶ In fact, failure is often how they identify a serious challenge (2).

As one Andrew Achievement player we interviewed said, "If I get irritated by a game, that's how I know I'm having fun."⁷

When designing trivia features, use tiered difficulties to create an effective challenge by ensuring that most players face a real chance of failure at some point.



⁵ 34-year-old with an avg. spend of \$10-\$25/month and 20 hours/week playtime

⁶ [Liquid & Grit RPG Personas Report](#), p. 17

⁷ 26-year-old with an avg. spend of \$100/month and 40-50 hours/week playtime

PRODUCT TRENDS

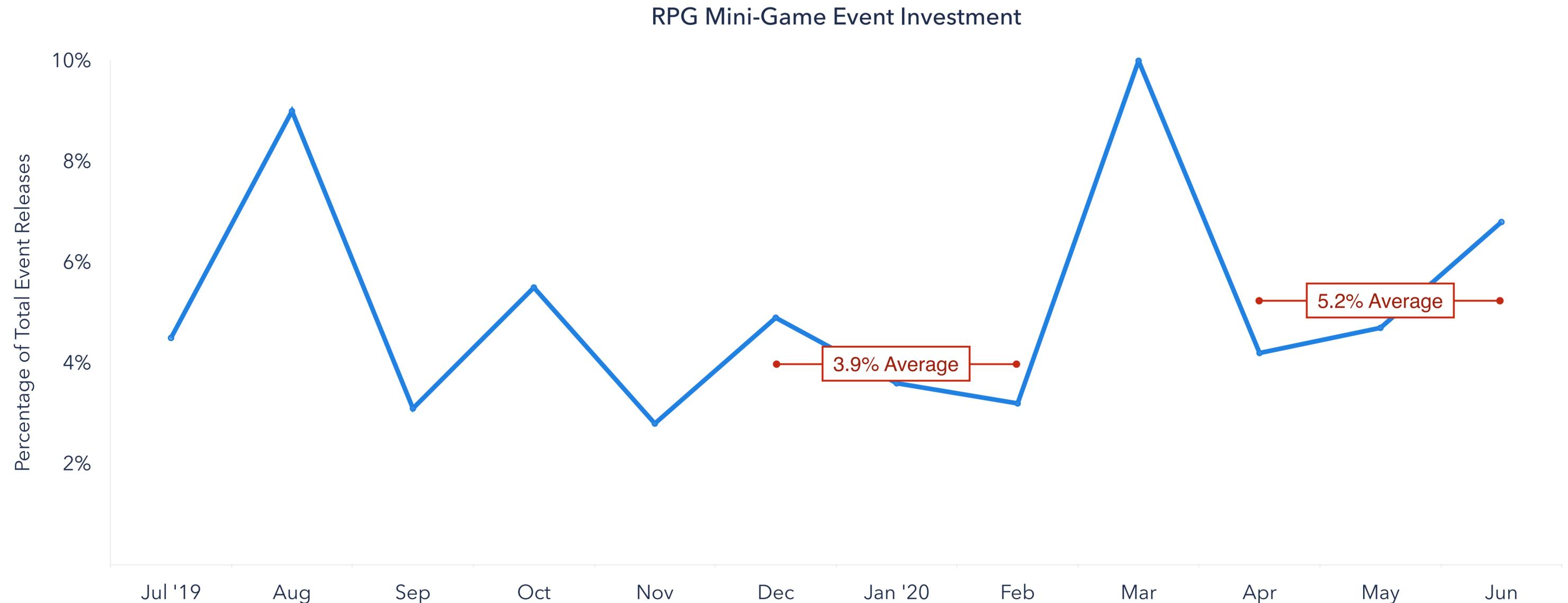


Investment trends for event and feature releases

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*

MINI-GAME EVENTS ARE GROWING

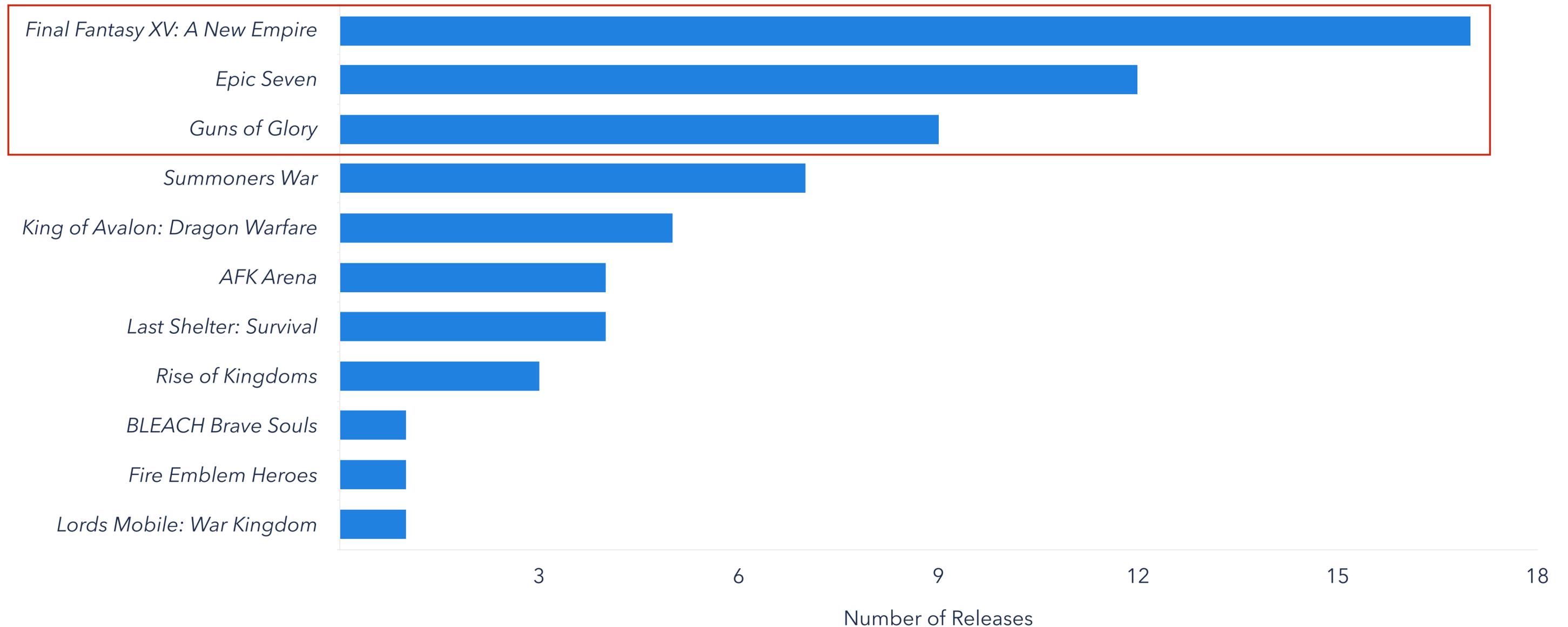
Leaving out March as an outlier, mini-games made up an average of 5.2% of events released in the past three months compared to 3.9% for December-February.



THREE APPS RELEASE THE MAJORITY OF MINI-GAME EVENTS

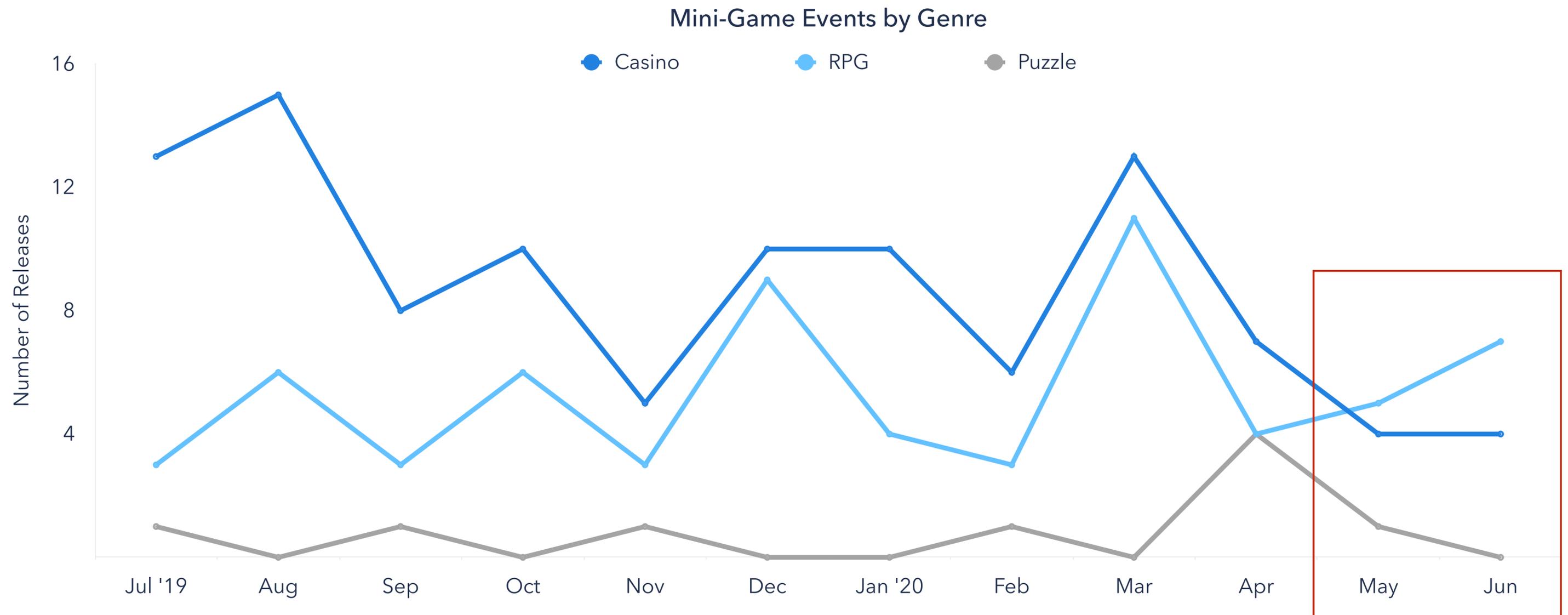
Final Fantasy XV: A New Empire released 17 mini-game events in the past year, the most of all tracked RPG apps. Three apps accounted for nearly 60% of all mini-game events.

Mini-Game Events by App (Past 12 Months)



CASINO RELEASES THE MOST MINI-GAMES... FOR NOW

Although casino apps released the most mini-games over the past year, RPG apps have released more for the past two months. Among tracked apps, mini-games made up 12% of casino events, 5% of RPG events, and 1% of puzzle events in the past year.



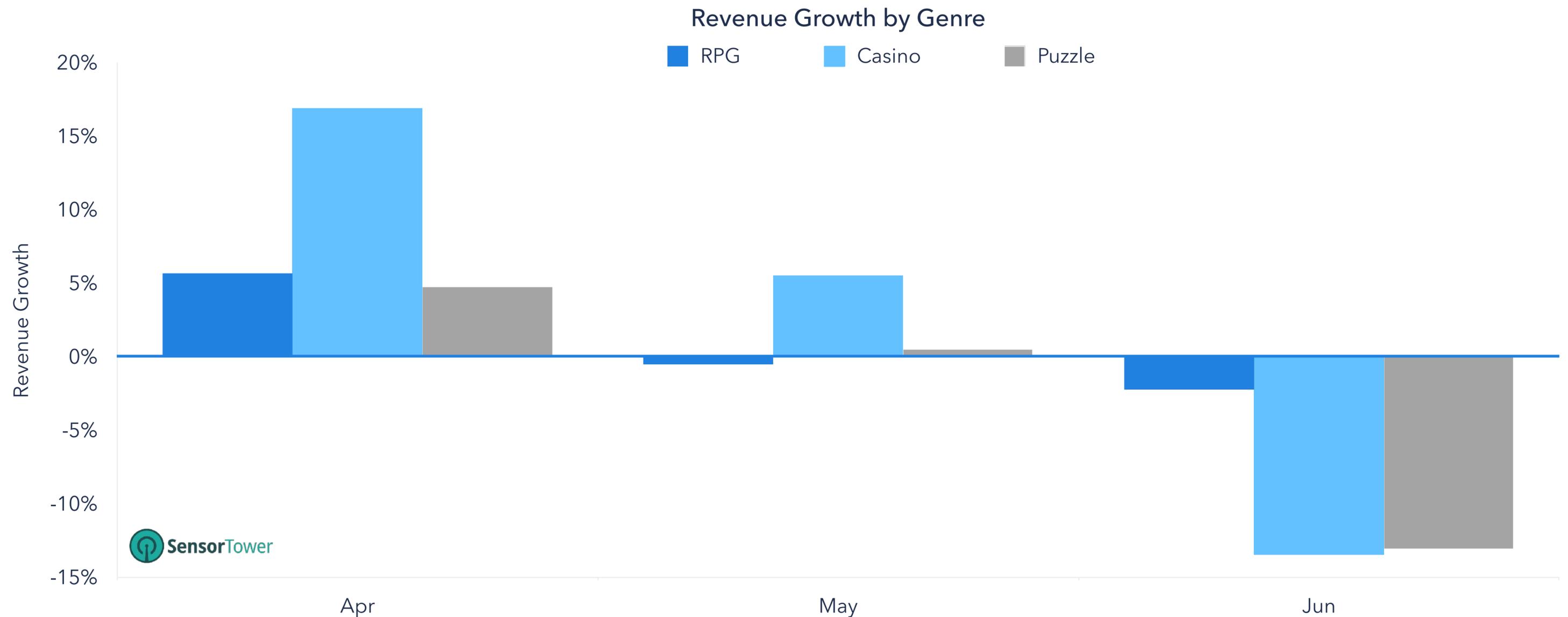
REVENUE MOVEMENT



Revenue changes within apps and across genres

JUNE REVENUE DECREASES ACROSS GENRES

RPG, casino, and puzzle all saw U.S. revenue decline in June; however, RPG revenue decreased the least. During the past three months, RPG and casino both averaged +3% MoM revenue growth, while puzzle averaged -3%.



Graph data is iOS and Android, U.S. only.
MoM = Month over month

NEW CONTENT

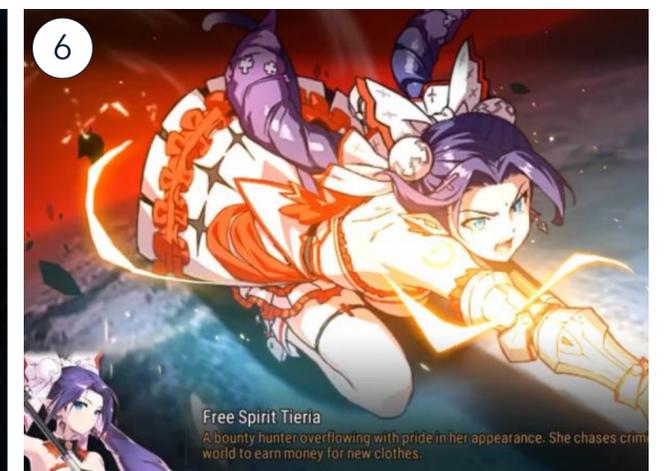
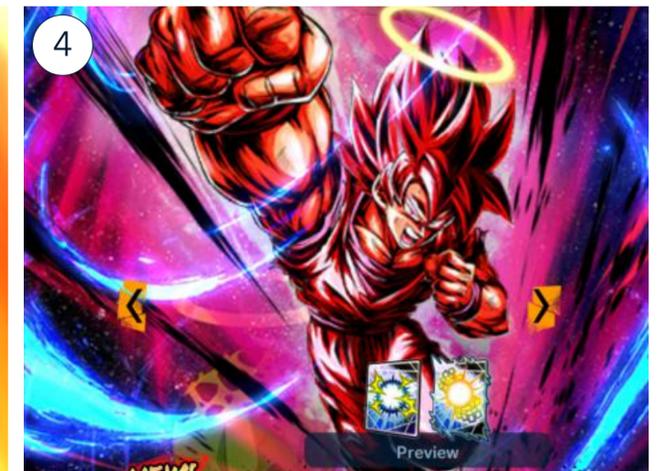


New heroes, equipment, and abilities

CONTENT RELEASES I

RPG > Content > Abilities, Equipment, and Heroes

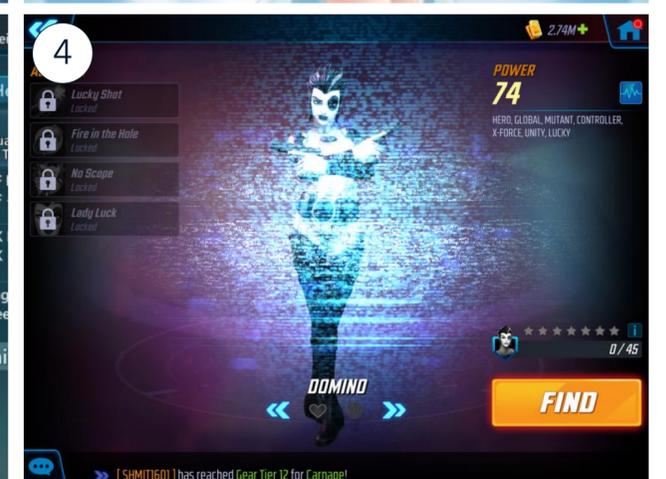
- 6/8 [Anoki](#) – AFK Arena hero (1)
- 6/29 [Flora](#) – AFK Arena hero
- 6/30 [Nakoruru](#) – AFK Arena hero (2)
- 6/16 [5 New Accessories](#) – BLEACH Brave Souls equipment
- 6/16 [13 Squads Summons](#) – BLEACH Brave Souls heroes (3)
- 6/30 [Swimsuit Summons: Summer Resort](#) – BLEACH Brave Souls heroes
- 6/10 [Worship me! Give praise unto me!](#) – Dragon Ball Legends equipment
- 6/17 [Awakened Leave the rest to me! No. 1](#) – Dragon Ball Legends equipment
- 6/24 [2nd Anniversary Rising - Kaioken](#) – Dragon Ball Legends heroes (4)
- 6/1 [Raffaele](#) – Empires & Puzzles hero
- 6/19 [Ranvir](#) – Empires & Puzzles hero
- 6/29 [Roc](#) – Empires & Puzzles hero (5)
- 6/11 [Hero Balance Adjustments](#) – Epic Seven abilities
- 6/4 [Cradle of Life](#) – Epic Seven equipment
- 6/11 [Flower Shower](#) – Epic Seven equipment
- 6/18 [Secret Art - Storm Sword](#) – Epic Seven equipment
- 6/11 [Free Spirit Tieria](#) – Epic Seven hero (6)
- 6/11 [Kizuna AI](#) – Epic Seven hero
- 6/18 [Celine](#) – Epic Seven hero
- 6/25 [Remnant Violet](#) – Epic Seven hero
- 6/4 [Weapon Refinery Update](#) – Fire Emblem Heroes abilities
- 6/18 [Harmonized Heroes](#) – Fire Emblem Heroes abilities



CONTENT RELEASES II

RPG > Content > Abilities, Equipment, and Heroes

- 6/5 [Book IV Mid: Mirabilis and More](#) – Fire Emblem Heroes heroes (1)
- 6/6 [Gangrel: Plegia's Mad King](#) – Fire Emblem Heroes hero
- 6/10 [Roy: Young Lion](#) – Fire Emblem Heroes hero
- 6/18 [Summer Passing](#) – Fire Emblem Heroes heroes (2)
- 6/19 [Rhys: Gentle Basker](#) – Fire Emblem Heroes hero
- 6/25 [Linde: Light Mage](#) – Fire Emblem Heroes hero
- 6/30 [Seliph: Scion of Light](#) – Fire Emblem Heroes hero
- 6/8 [Sky Silver Airship Parts](#) – Guns of Glory equipment
- 6/11 [Brutus and Dindrane](#) – King of Avalon: Dragon Warfare heroes
- 6/23 [Hero Skills Update](#) – Last Shelter: Survival abilities
- 6/4 [Magmaroid](#) – Lords Mobile: War Kingdom hero (3)
- 6/10 [Cable and Deadpool Updates](#) – MARVEL Strike Force abilities
- 6/2 [Ironheart](#) – MARVEL Strike Force hero
- 6/10 [Domino](#) – MARVEL Strike Force hero (4)
- 6/18 [Negasonic Teenage Warhead](#) – MARVEL Strike Force hero
- 6/1 [Theodora](#) – Rise of Kingdoms hero
- 6/1 [Yi Sun-sin](#) – Rise of Kingdoms hero
- 6/3 [Outlaw Officers](#) – Star Trek Fleet Command heroes (5)
- 6/22 [Darth Vader Touch Up](#) – Star Wars: Galaxy of Heroes abilities
- 6/3 [Imperial TIE Bomber](#) – Star Wars: Galaxy of Heroes hero (6)
- 6/29 [Skill Balancing Modification](#) – Summoners War abilities
- 6/11 [5 New Transmogrifications](#) – Summoners War equipment



MARKET WATCH



New apps and notable releases from established competitors

SOFT-LAUNCH & BREAKOUT APPS

Hardhead Squad by Rovio

Soft-Launch App Details

- Players build bases, recruit armies, and upgrade technology to conquer territories on a hex-tile map in a stylized modern combat setting (1).
- Special heroes can be recruited as players progress (2).
- Players can collaborate or attack each other in real time.

Launch Information

- Soft-launched on 5/31 in the U.S., the Philippines, Finland, Sweden, and Poland
- Average daily revenue since launch: \$47
- Average daily downloads since launch: 479
- View *Hardhead Squad* on the [App Store](#)



War of the Visions: Final Fantasy Brave Exvius by Square Enix

Breakout App Details

- This tactical RPG spin-off of *Final Fantasy Brave Exvius* is inspired by the popular *Final Fantasy Tactics* series and features heroes from past titles.
- Quests are fully voiced in Japanese and English.
- Battles take place in 3D environments with abilities that are influenced by terrain and elevation (3).
- Multiplayer modes include cooperative quests and PvP duels.
- A bingo board-style challenge matrix rewards players for completing challenges to make bingos.

Launch Information

- Released worldwide on 3/25/20
- 21st highest-grossing RPG app as of 7/1/20
- Average daily revenue (U.S., 90 days): \$94,576
- Average daily downloads (U.S., 90 days): 1,386
- View *War of the Visions: Final Fantasy Brave Exvius* on the [App Store](#)

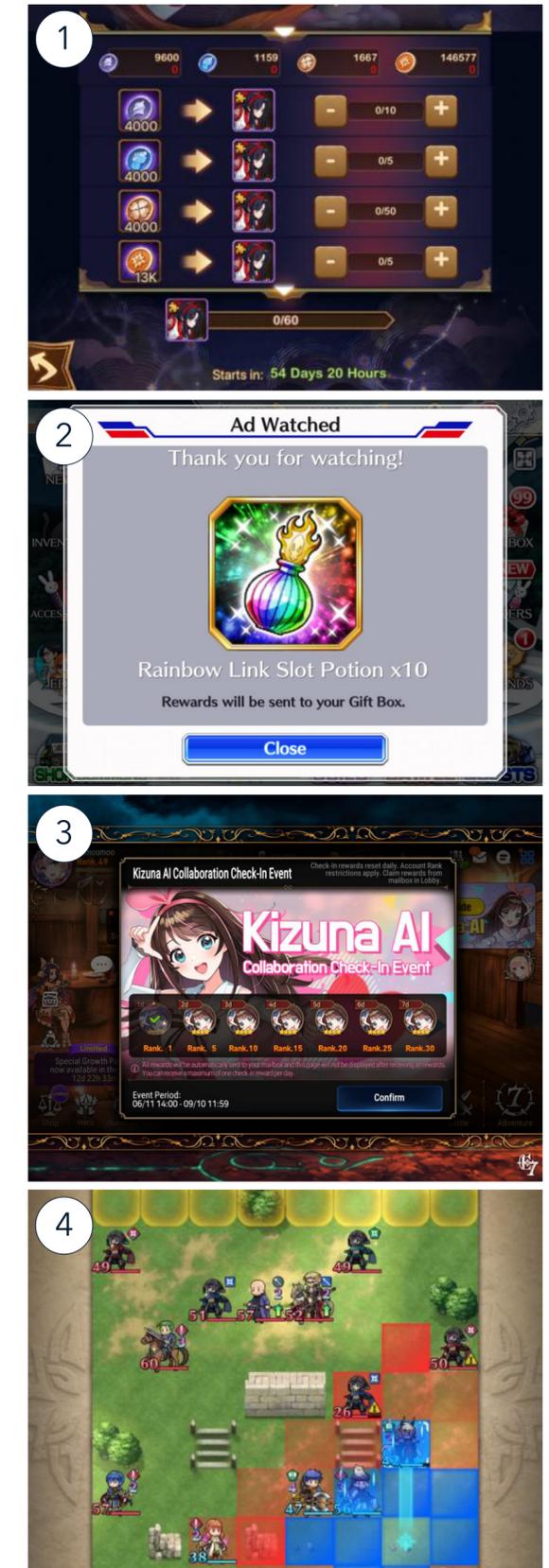
High production value—including story, characters, graphics, and sound design—was the most commonly cited reason by RPG players for continuing to play.⁸



⁸ [Liquid & Grit RPG Personas Report](#), p. 13

NOTABLE RELEASES I

App	Library	Description
AFK Arena	Nakoruru hero content	<ul style="list-style-type: none"> • Players get seven free days to play with Nakoruru—an SNK-licensed hero from the <i>Samurai Showdown</i> fighting series (video). • Nakoruru can be purchased immediately for \$49.99. • A timer counts down until Nakoruru can be purchased with multiple in-game currencies. <ul style="list-style-type: none"> • Players can set aside currency ahead of time (1).
BLEACH Brave Souls	Watch to Earn bonus feature	<ul style="list-style-type: none"> • Players can watch ads for bonuses, items, energy, summons, and XP boosts (2 and video). • Rewarded ads can be enabled or disabled in the settings menu.
Epic Seven	Kizuna AI Collaboration reward event	<ul style="list-style-type: none"> • Daily logins award a copy of Kizuna AI—a new hero based on an animated YouTube pop star. • Players must meet increasing account level requirements each day to continue to collect copies of the hero (3).
Fire Emblem Heroes	Resonant Battles competition feature	<ul style="list-style-type: none"> • Players have five attempts to defeat thieves before they reach the top of the map (4). • Thieves move up one tile per turn. • Matches end once all thieves have reached the top or been defeated (video). • Certain heroes award double points.

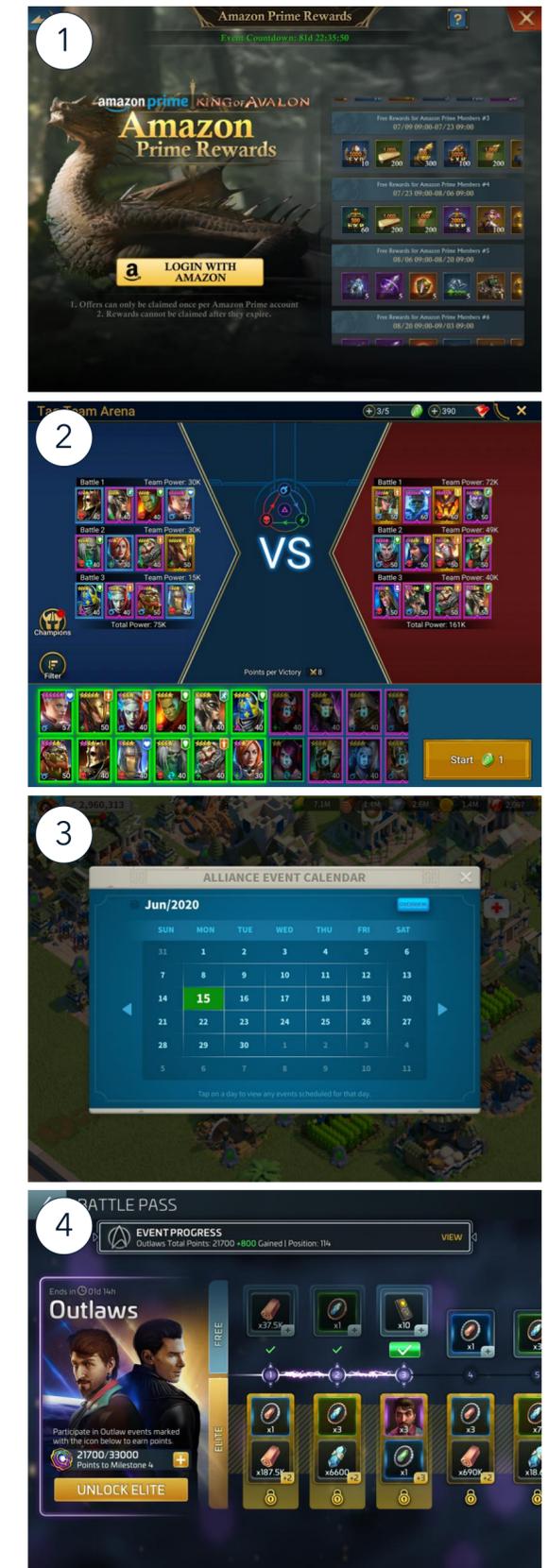


NOTABLE RELEASES II

App	Library	Description
<i>King of Avalon: Dragon Warfare</i>	Amazon Prime Rewards purchase feature	<ul style="list-style-type: none"> Amazon Prime members can claim free rewards twice a month (1). Players must log in to their Amazon accounts through the app.
<i>RAID: Shadow Legends</i>	Tag Team Arena expansion feature	<ul style="list-style-type: none"> Players build three teams of heroes for a three-round PvP battle (2). Matches cost tokens that are replenished daily and can also be purchased. The first player to win two rounds wins (video). Players are ranked for tier-based rewards.
<i>Rise of Kingdoms</i>	Alliance Event Calendar club feature	<ul style="list-style-type: none"> Club leaders and officers can schedule events on a calendar (3 and video). All club members receive an event notification. Options include scheduling event reminders and confirming members' participation.
<i>Star Trek Fleet Command</i>	Battle Pass mission event	<ul style="list-style-type: none"> A new story arc, Outlaws, includes events, missions, heroes, avatars, and more. Players earn points from Outlaw events or purchases. Points award prizes at milestones (4 and video). \$19.99 and \$99.99 IAP bundles include a season pass that unlocks two extra reward tiers.

Quickly review all features and events

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

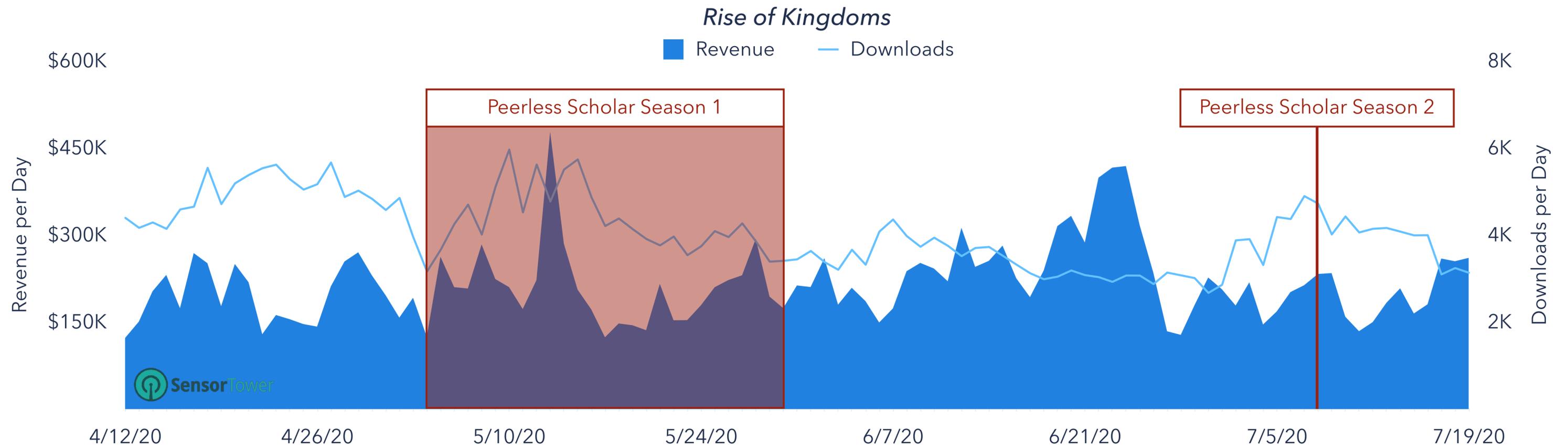


APPENDIX



RISE OF KINGDOMS RELEASE SCHEDULE

Releases	
4/13-5/25: Light and Darkness club event	5/11-5/14: Ceroli Assault club event expansion
5/4: Peerless Scholar mini-game feature	5/11-5/15: Happy Together purchase event
• 5/4-5/30: Season 1	5/11-5/17: The Mightiest Governor mission event
• 7/8-7/25: Season 2	5/12-5/14: Wheel of Fortune mini-game event
5/8-5/24: Mighty Conqueror purchase event	5/13-5/16: Sharp Eyes & Quick Hands and Picking Up Pieces mini-game event
5/9-5/17: Family Day challenge event (reskin)	<i>No IAP changes during release timeframe.</i>
5/10-5/16: Recharge Rewards purchase event	



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

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.



Kinrate Analytics

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.



Sensor Tower

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)

“We're not just our failures. As much as they hurt, we learn from them.”

– Spider-Man, All-New Captain America #1

LiquidandGrit.com



Brett.Nowak@LiquidandGrit.com

