



LIQUID&GRIT

RPG REPORT

Competitive Research and Actionable Product Recommendations

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FEBRUARY

2020

BREAKOUT APPS

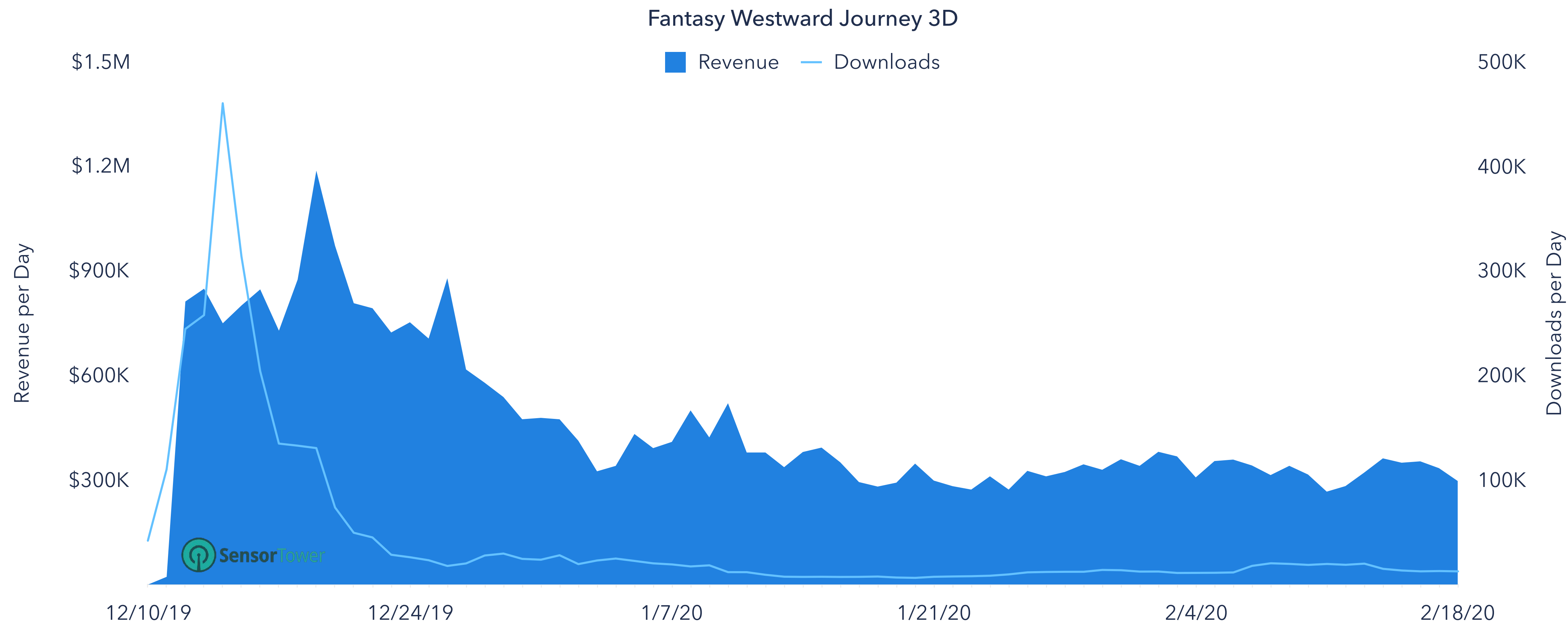


RPG > GAMES

FANTASY WESTWARD JOURNEY 3D BY NETEASE

REVENUE ANALYSIS

In January 2020, *Fantasy Westward Journey 3D* averaged \$358,275 in daily revenue and 12,982 daily downloads. The app launched exclusively in China in December 2019.



Graph data is iOS China only.

FEATURE TEARDOWN

This open-world MMORPG offers in-depth character customization and multi-path storytelling.

Details

- The game world contains nearly 38 million square meters of playable area (1).
- Players can complete 8 main quests, 14 side quests, 5 instances, and 9 recurring daily and weekly challenges.
- Story elements include animated cinematics, quick-time events, fully voiced characters, and multiple endings that change based on players' decisions (2).

Heroes

- Players choose a hero and a sect (3).
- Each sect provides unique skills and side quests.
- Heroes' faces are highly customizable (4).
- Players can map their own facial expressions onto heroes (5).



FEATURE TEARDOWN (CONT.)

Players can become in-game couples by exchanging a certain number of gifts. A livestreaming feature lets players watch streams within the app.

Equipment

- Companion creatures award combat boosts (1).
 - Creatures can be captured in the wild, traded with other players, or evolved.
- Beginning at level 55, players can create magic weapons by combining certain items (2).
 - Magic weapons add special abilities like increased attack range, hypnosis, team healing, and more.

Social

- Players can join gangs.
 - Gang members earn gang credits through participating in gang challenges.
 - Gang credits upgrade players' combat abilities.
- Players who send each other a certain number of gifts can become in-game couples.
- A livestreaming feature allows players to watch streams without leaving the game (3).

Competitions

- Level 40+ players can access arena and gang PvP competitions.
- Match types include 1v1, 5v5, 20v20, and a 100-player melee (4).
- Gangs with at least 20 players who are level 40+ can enter gang competitions.
 - Players can watch all gang competitions.
 - Gang competitions open every Tuesday and Thursday.
 - Each season lasts four weeks.
 - At the end of each season, the best gang from each rank battles the worst gang from the next rank up to determine the next season's ranks.

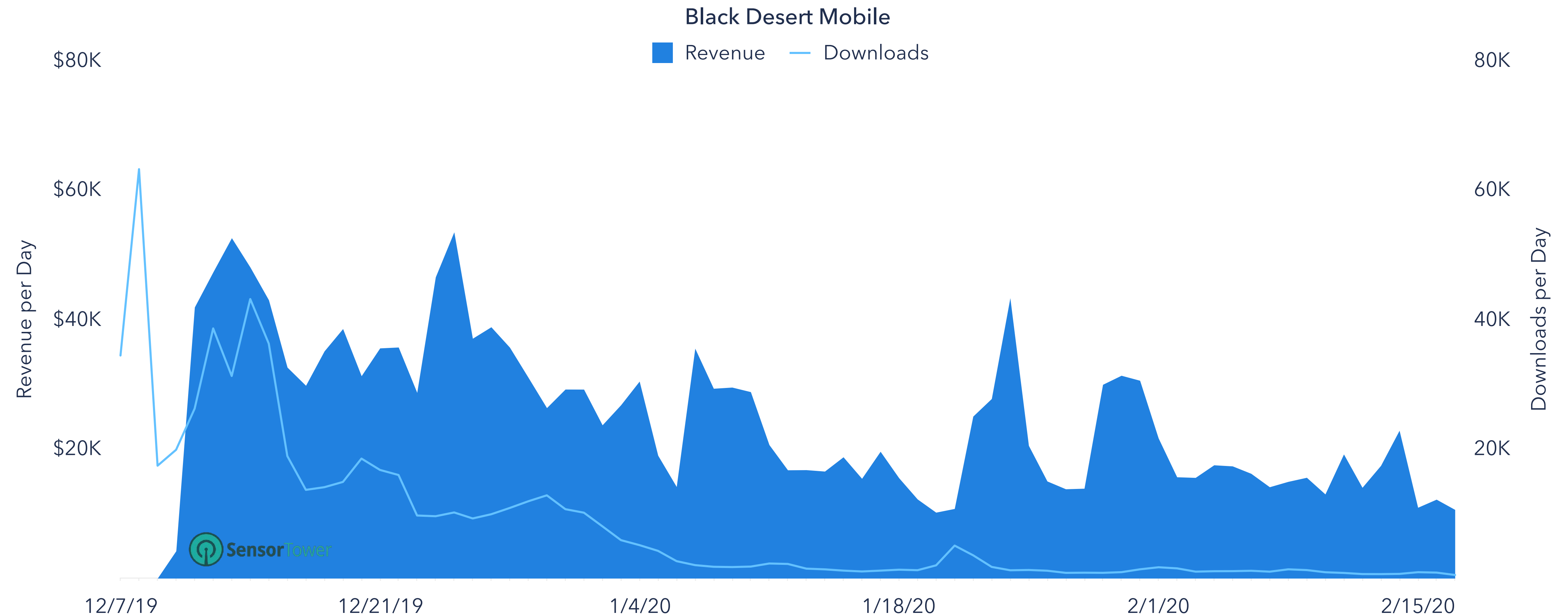


RPG > GAMES

***BLACK DESERT MOBILE* BY PEARL ABYSS**

REVENUE ANALYSIS

Since its U.S. release in December 2019, *Black Desert Mobile* has averaged \$24,114 in daily revenue and 8,431 daily downloads.



Graph data is iOS U.S. only.

FEATURE TEARDOWN

While waiting for *Black Desert Mobile* to download, players can play a mini-game. The app offers highly customizable characters and an in-depth pet collection feature.

App Details

• New User Flow

- Players can play a mini-game while waiting for the app to download (1 and video).
- The mini-game awards materials that enhance gear.
- Character creation offers extensive customization options for appearance and clothing (2).
- Players can also adjust graphics, effects, and audio settings (3).

• Pet Collection

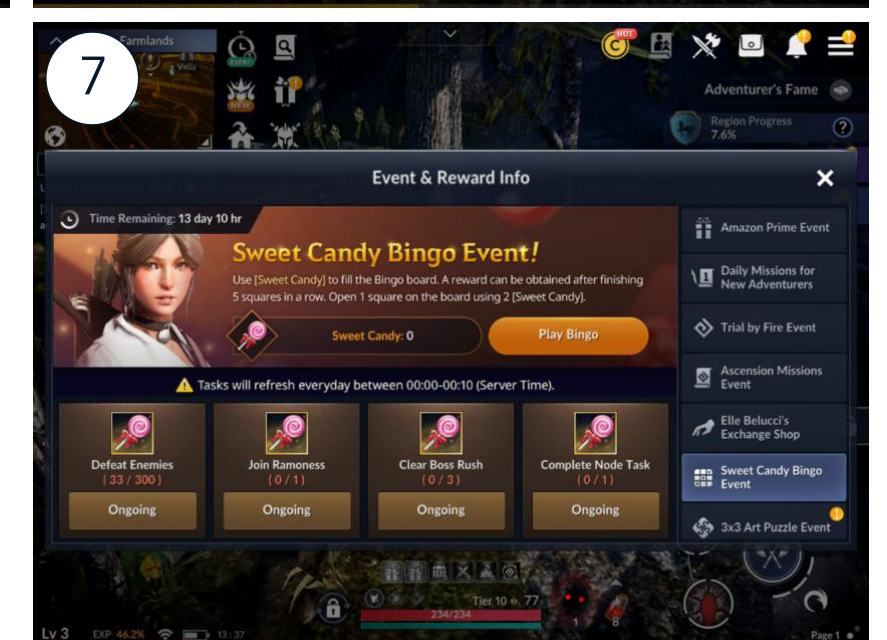
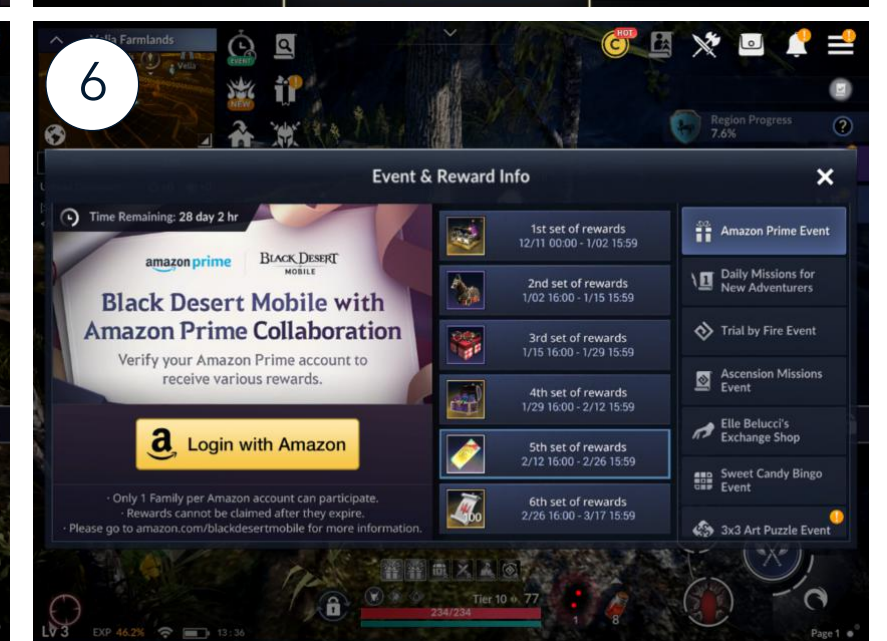
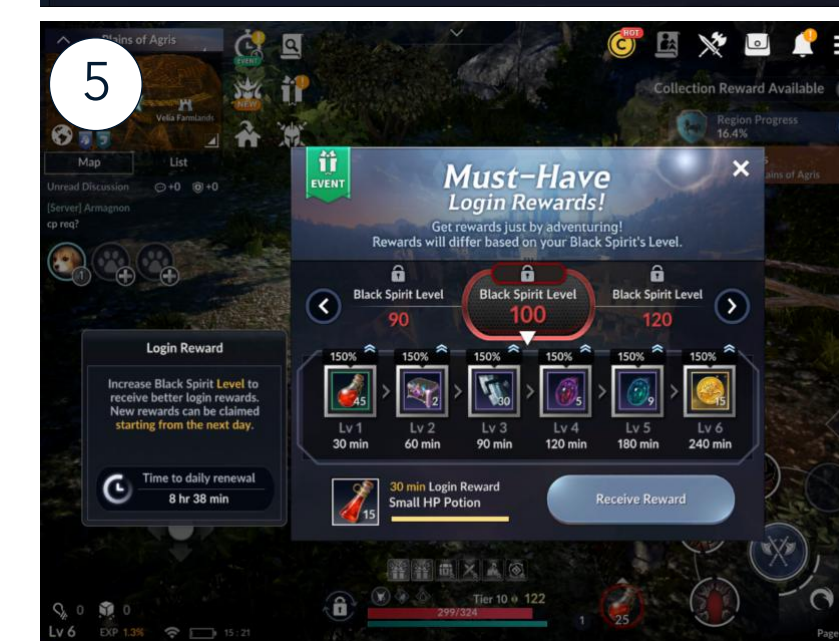
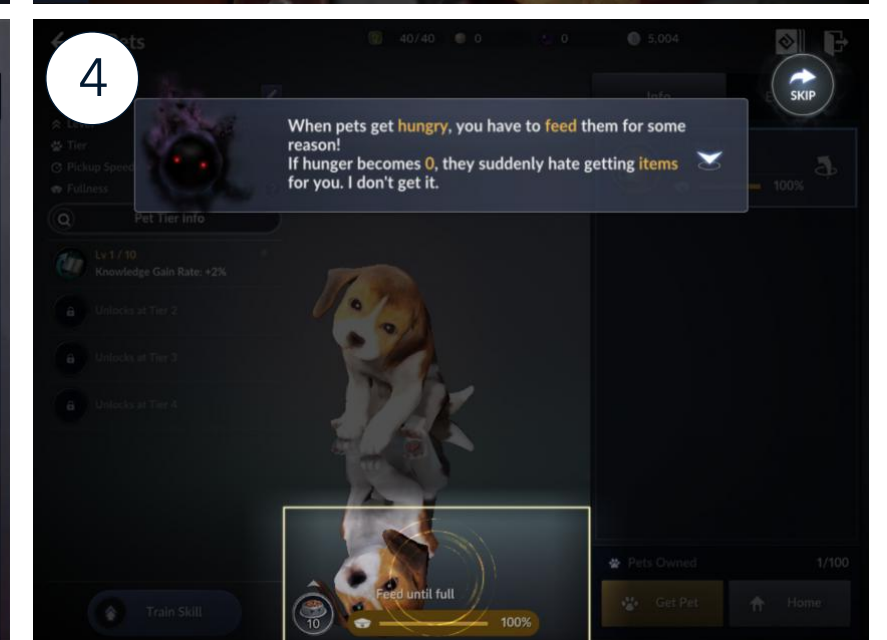
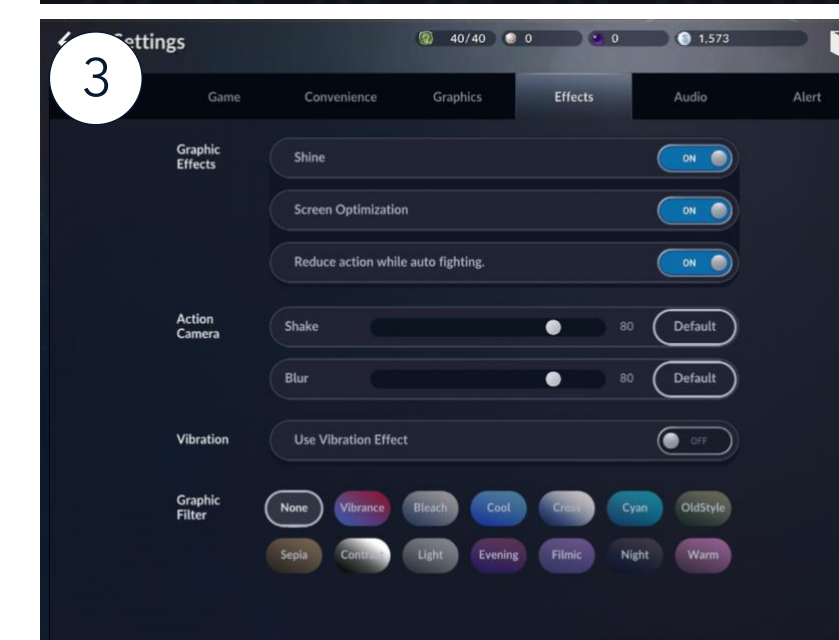
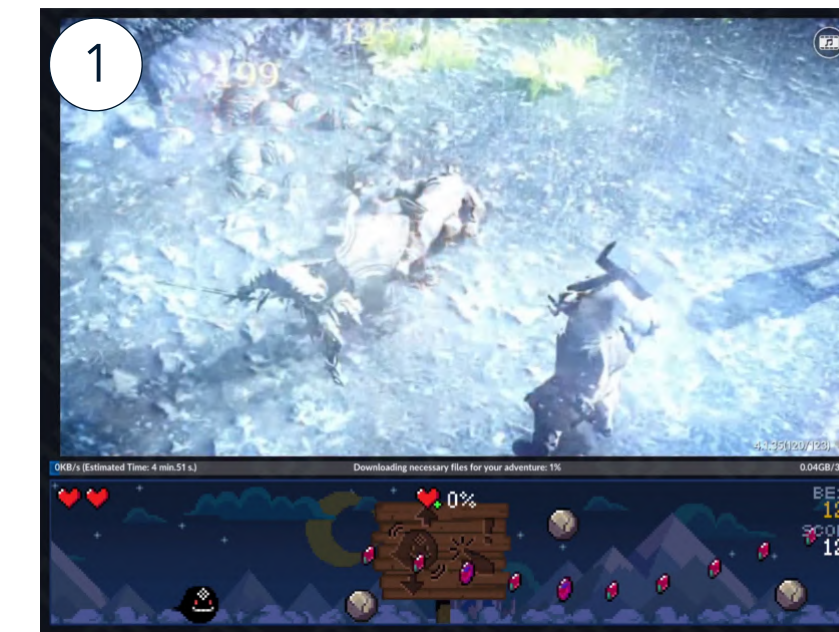
- Players can collect and level pets and horses.
- Pets and horses provide stat bonuses, increased travel speed, items, and random skills.
- Players must feed pets to maintain boosts (4).

• Events & Bonuses

- Daily login bonuses scale with players' Black Spirit levels (5).
- An Amazon Prime event unlocks a series of rewards for players who link their Prime accounts (6).
- Other events include bingo- and puzzle-based challenges and a social redemption code reward event (7).

Additional Information

- Go [here](#) to see more images and videos.
- Soft launch: 9/26/19
- Hard launch: 12/12/19
- Download the app from the [App Store](#).



NEW INNOVATION



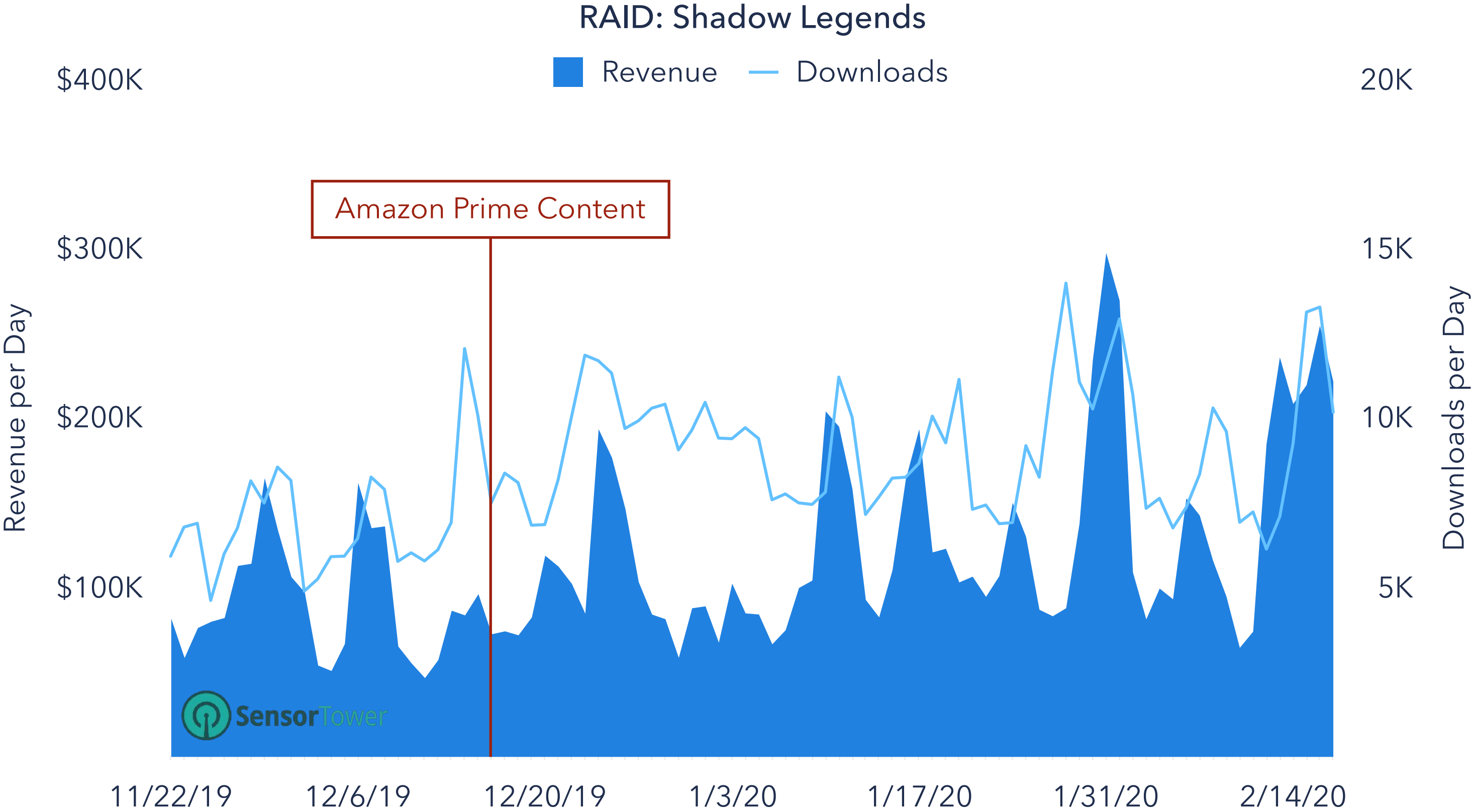
RPG > EVENTS > PURCHASES

AMAZON PRIME CROSS-PROMOTION

Amazon Prime Content in *RAID: Shadow Legends*

REVENUE ANALYSIS

After the release of the Amazon Prime content in *RAID: Shadow Legends*, revenue was +17% and downloads were +37% MoM. Revenue and downloads continued growing to +31% and +40% 2Mo2M. Other factors likely contributed to this growth.



Releases
12/13-12/15: Summon Rush collection event
12/13-12/19: Arena Assault competition event
12/13-12/26: Champion Training Event leveling event
12/13-12/29: Holiday Fusion Event collection event
12/14: \$29.99 Package Tier 30 IAP moved +1 to #3
12/16: Amazon Prime Content purchase event
• 12/16: Ultimate Galek content release
12/16: Happy Holidays rewards event
12/16-12/18: Artifact Enhancement Event accelerator event
12/16-12/21: Spider Tournament competition event
12/16-12/22: Dungeon Divers Event challenge event
12/17-12/25: New Year Pack purchase event
12/18:
• \$4.99 Package Tier 5 IAP moved +1 to #1
• \$2.99 Package Tier 3 IAP to #10 (NPL)

NPL = Not previously listed.

Graph data is iOS U.S. only.
WoW = This week over last week. MoM = This month over last month.

FEATURE TEARDOWN

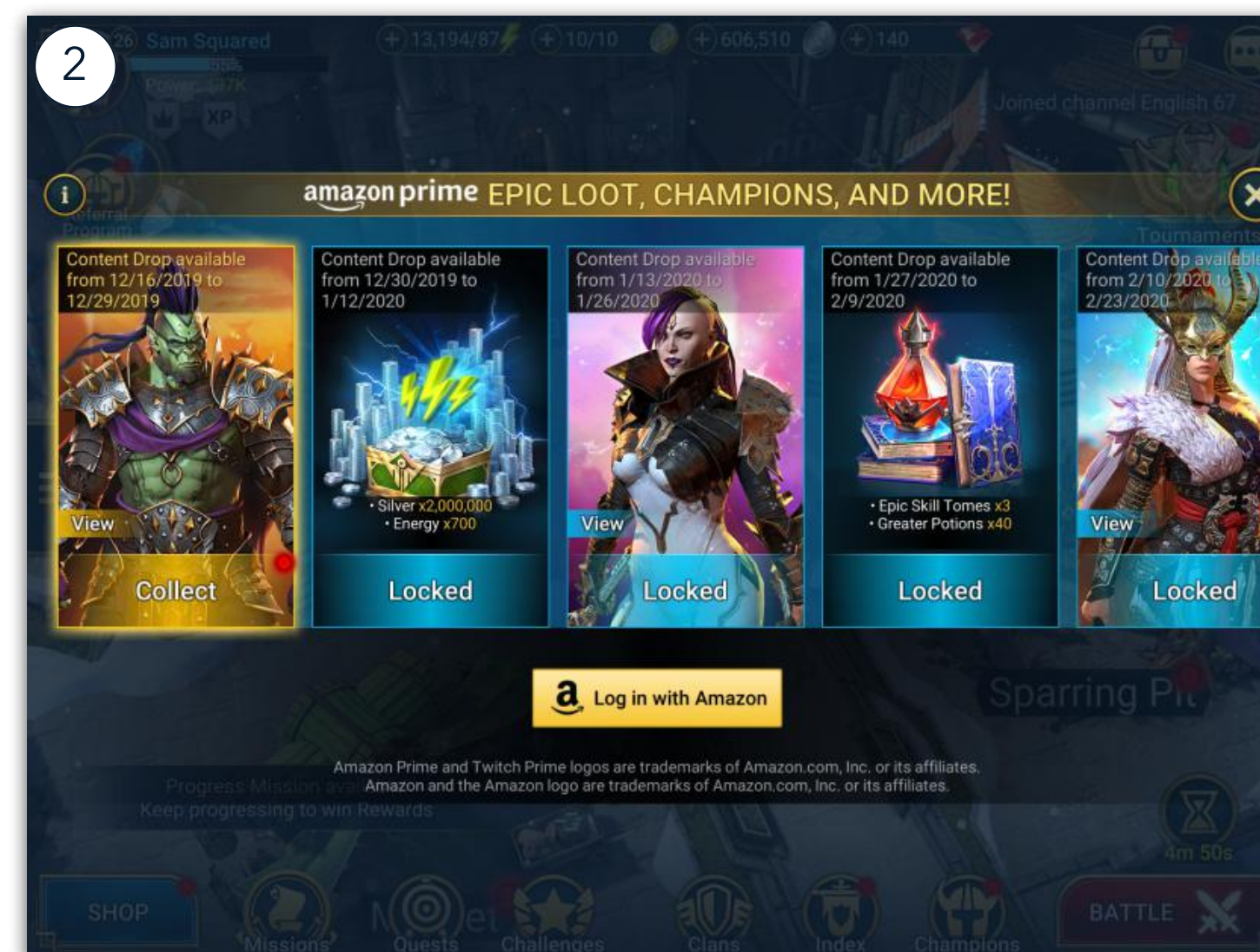
Amazon Prime subscribers can collect exclusive champions and loot bundles from a series of timed content drops.

Details

- Content drops award exclusive heroes and loot bundles to Amazon Prime members (1).
- Content drops are available one at a time for two weeks each (2).
- Players must manually claim content drops within the mobile app (3).
- Players log in to Amazon Prime through the app.
- Each Amazon Prime account can only be connected to one *Raid* account.

Additional Information

- See the [Amazon Prime Content](#) Library for more images and videos.



PRODUCT INSIGHTS

Strategic partnerships and cross-promotions can create novel experiences, expand players' lifetime value—and even go viral.

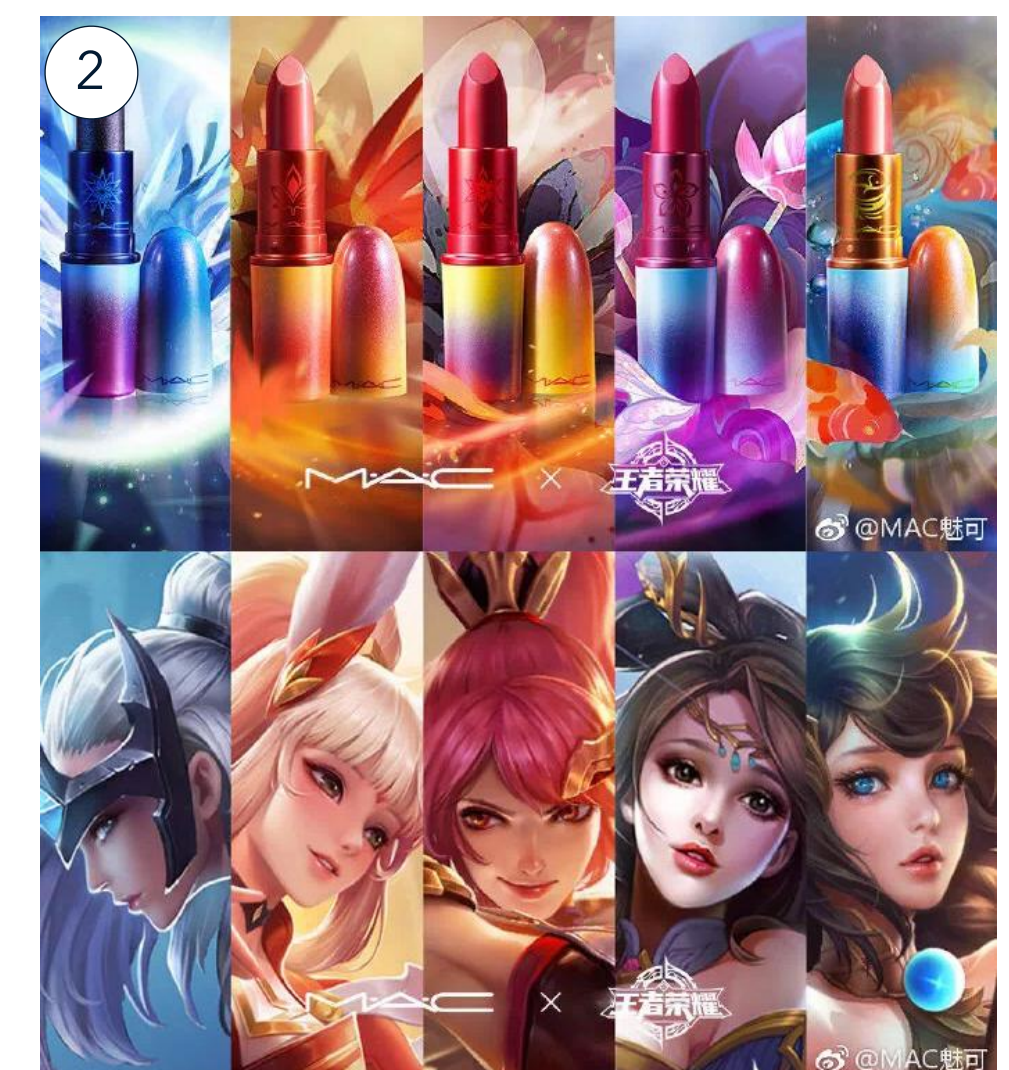
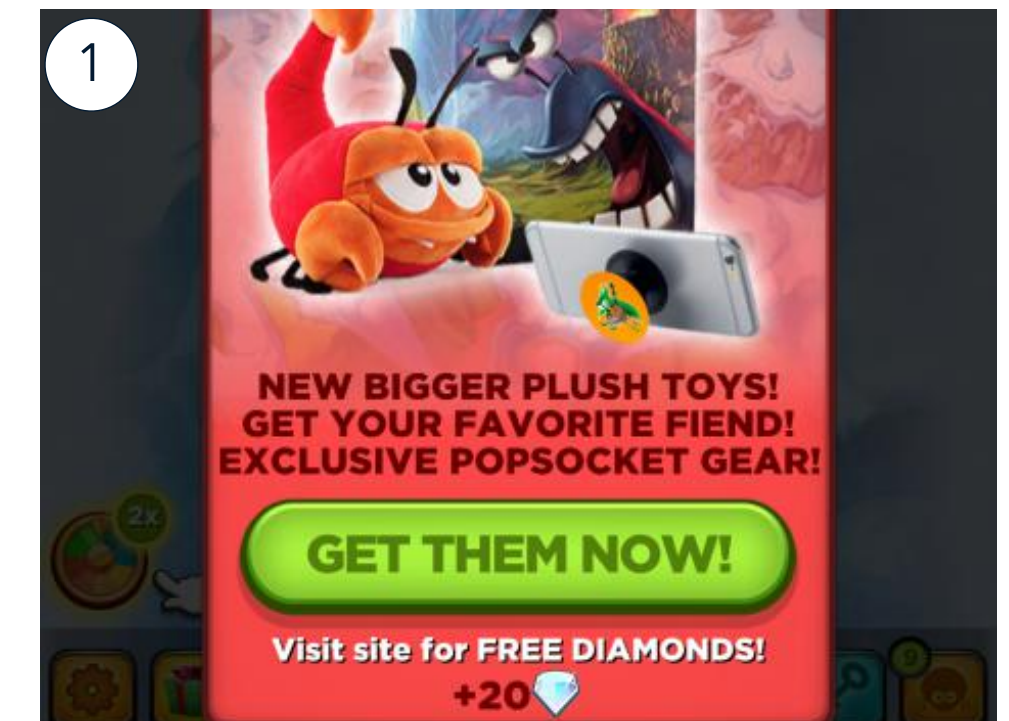
- **Use real-world goods to capture a different share of players' wallets than in-app purchases.** Access more of players' spending with real-world rewards for in-game activities, like *Winning Slots*' [Prize Shop](#). Similarly, offer in-game incentives for real-world activities, like *Best Fiends*' rewards for sharing videos on social media or visiting the app's Amazon page (1).
- **Listen to players—and don't shy away from unconventional partnerships.** Last month, *Honor of Kings* publisher Tencent collaborated with MAC Cosmetics to launch a limited-edition line of lipstick (2). The unorthodox collaboration was inspired by online conversations between players who were trying to find lipstick to match their favorite *Honor of Kings* heroes. During the event, players could purchase five hero-inspired lipstick colors through both MAC and Tencent channels. The entire line sold out in under 24 hours.¹
- **Work with partners that match your brand's voice.** A shared tone helps *Angry Birds 2*'s [recent collaboration](#) with *Duolingo* feel natural despite the unrelated apps. Duo, *Duolingo*'s playful, sassy, and passive-aggressive owl mascot,² fits easily into *Angry Birds 2*'s cast of characters. The campaign includes [funny short videos](#) featuring characters from both apps (3)—likely attempting to piggyback on the viral success of *Duolingo*'s 2019 April Fool's video that racked up almost 3.7 million views.³
- **Successful IPs + multimedia partnerships = big business.** *The Angry Birds Movie* grossed \$352.3 million worldwide. *World of Warcraft*'s movie adaptation took in \$433.5 million. Film and TV adaptations of successful video game IPs are more popular than ever—and you don't need a Hollywood budget to make a big impact. *Best Fiends*' animated YouTube shorts, produced in collaboration with Reel FX Creative Studios, get millions of views.⁴

¹ [An exemplary cross-industry collaboration example in China](#)

² [Duolingo redesigned its owl to guilt-trip you even harder](#)

³ [Introducing Duolingo Push](#)

⁴ [Best Fiends' YouTube Channel](#)



TRENDS



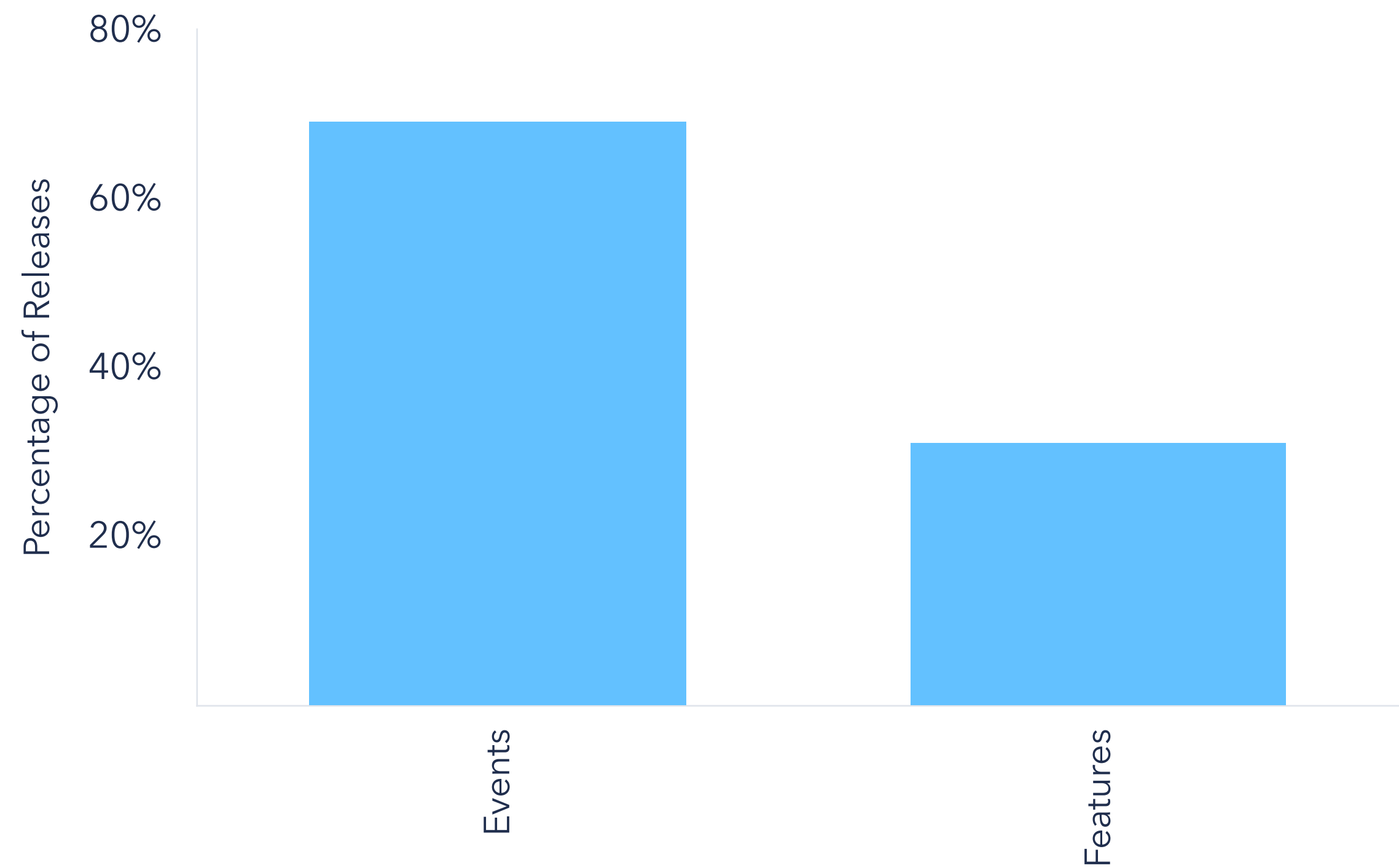
Tracked RPG apps:

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, and Summoners War

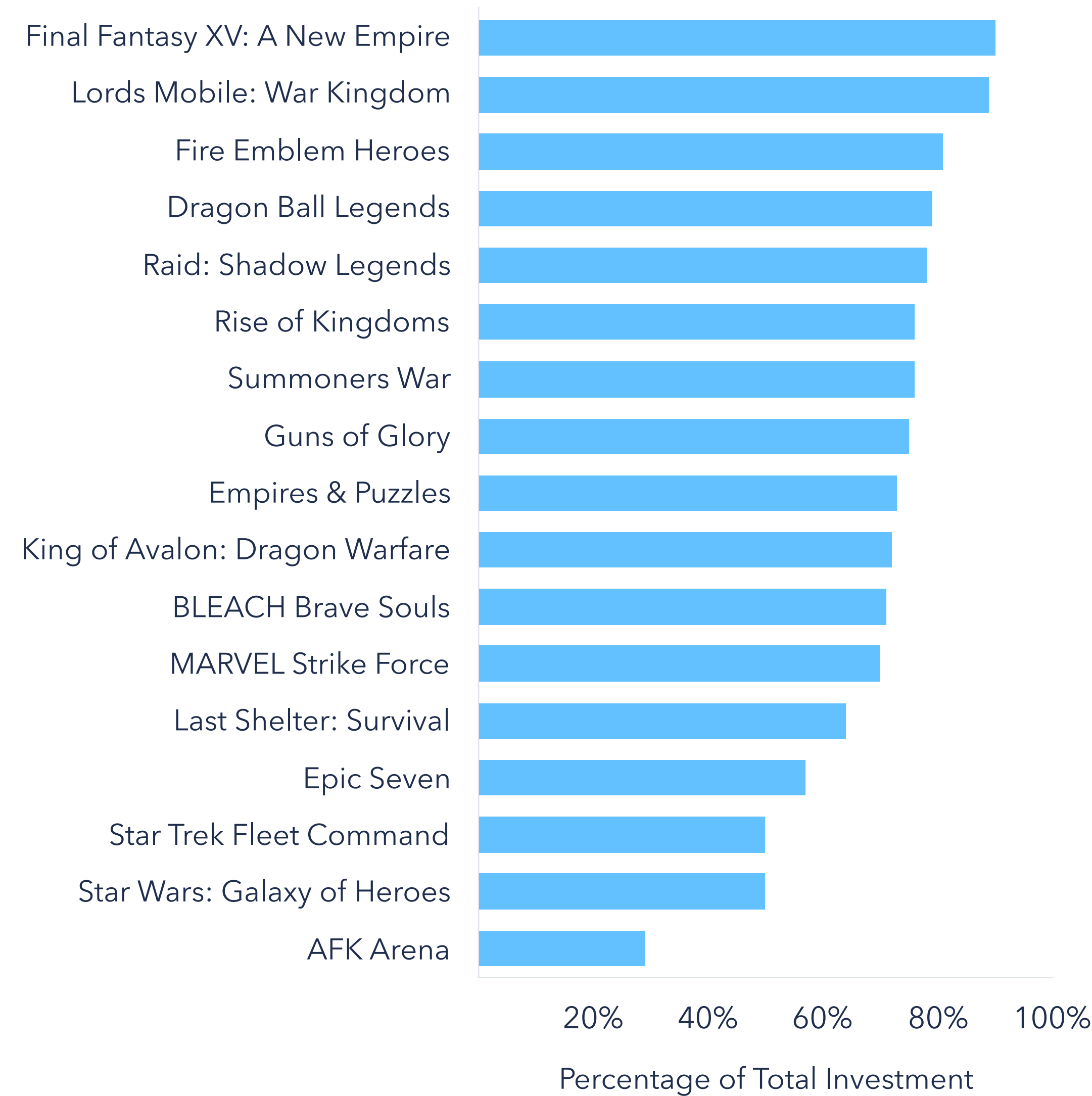
EVENTS VS. FEATURES IN 2019

Events make up 69% of releases in top-grossing RPG apps—more than double the number of features. *Final Fantasy XV* (90%) and *Lords Mobile* (89%) invest the greatest percentage of their portfolios into events.

Events vs. Features in 2019

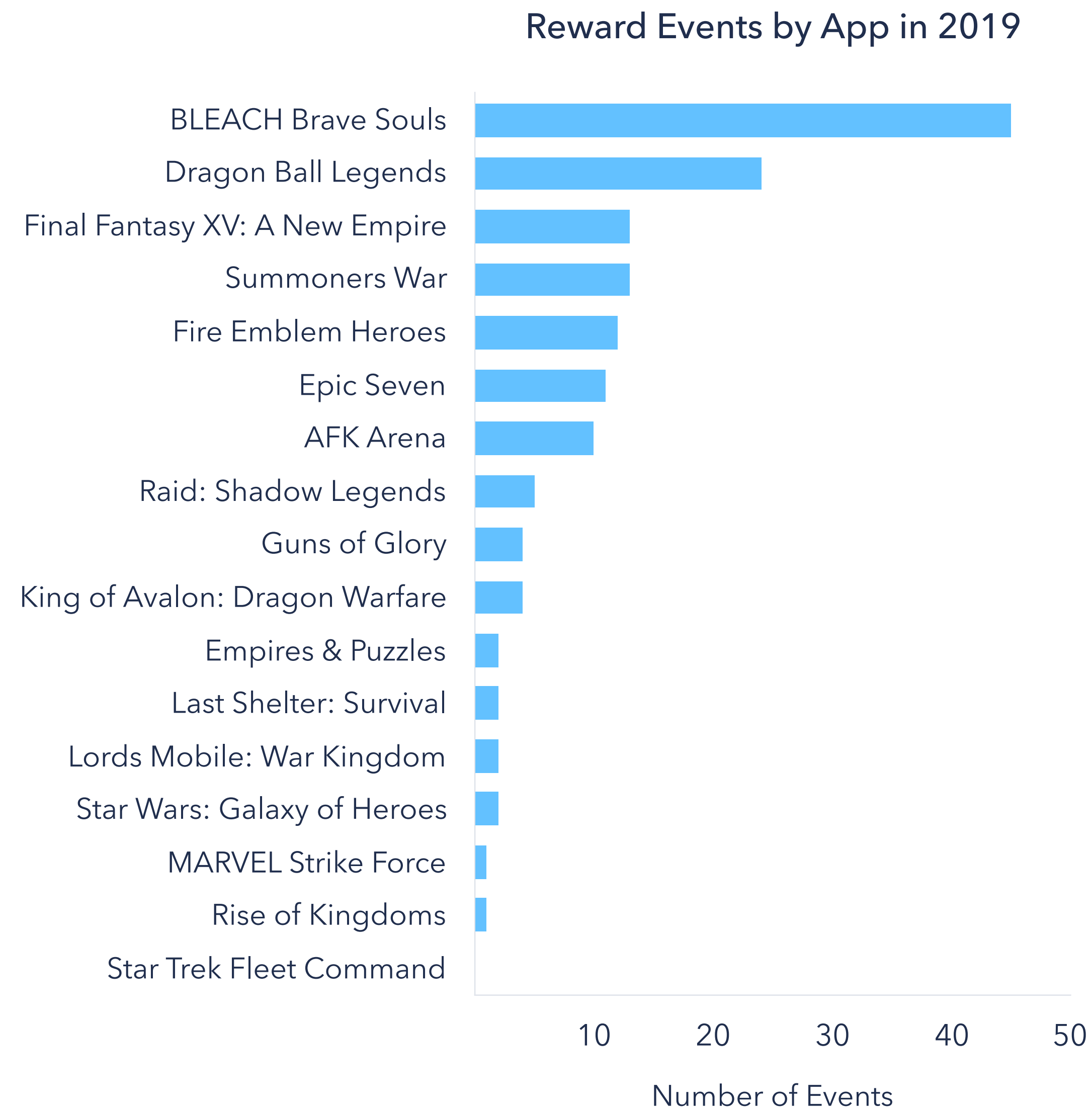
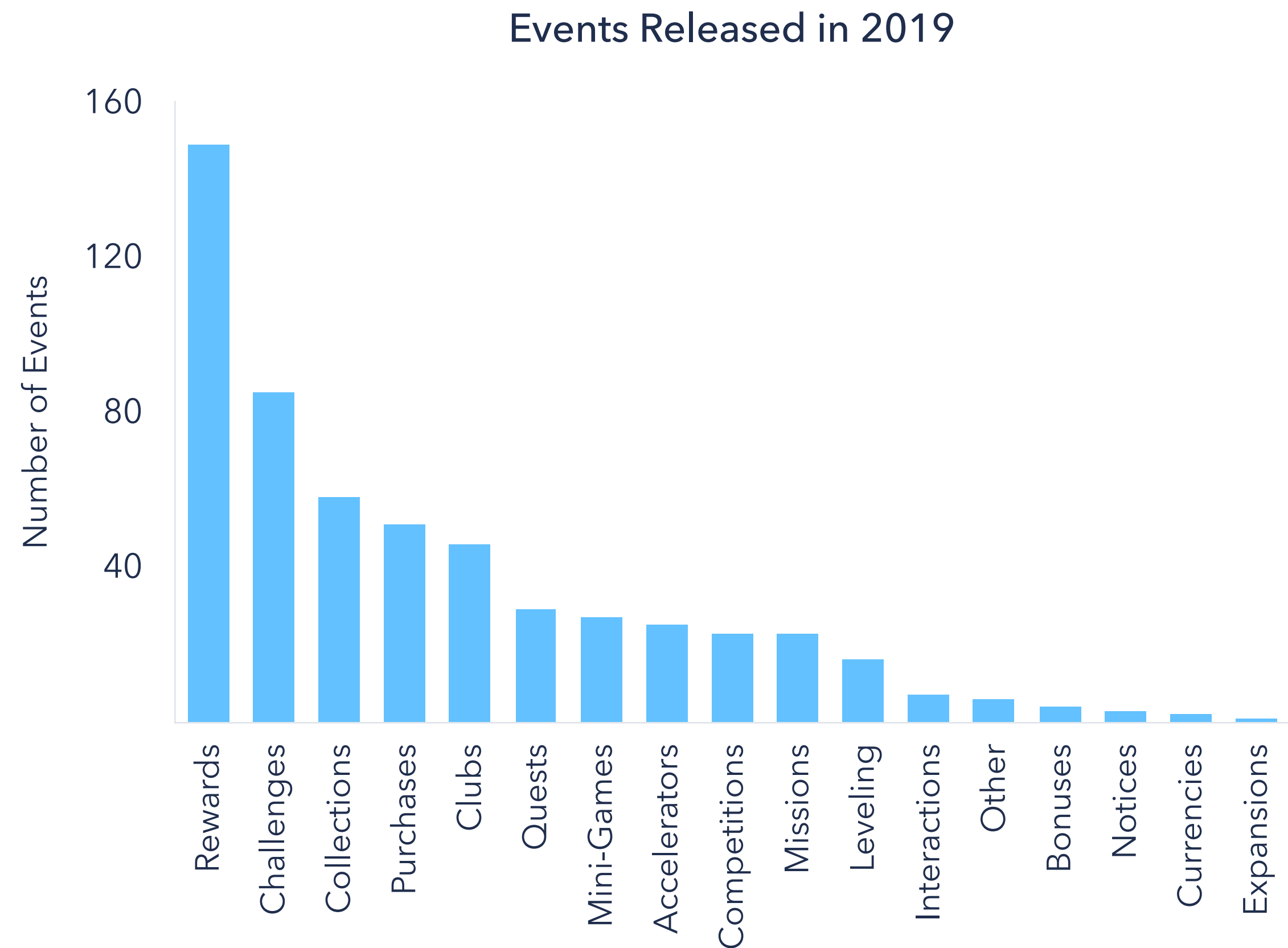


Events vs. Features by App in 2019



EVENT TYPES IN 2019

Rewards events were by far the most popular event type in 2019. *BLEACH Brave Souls* and *Dragon Ball Legends* released the most, while *Star Trek Fleet Command* released none.



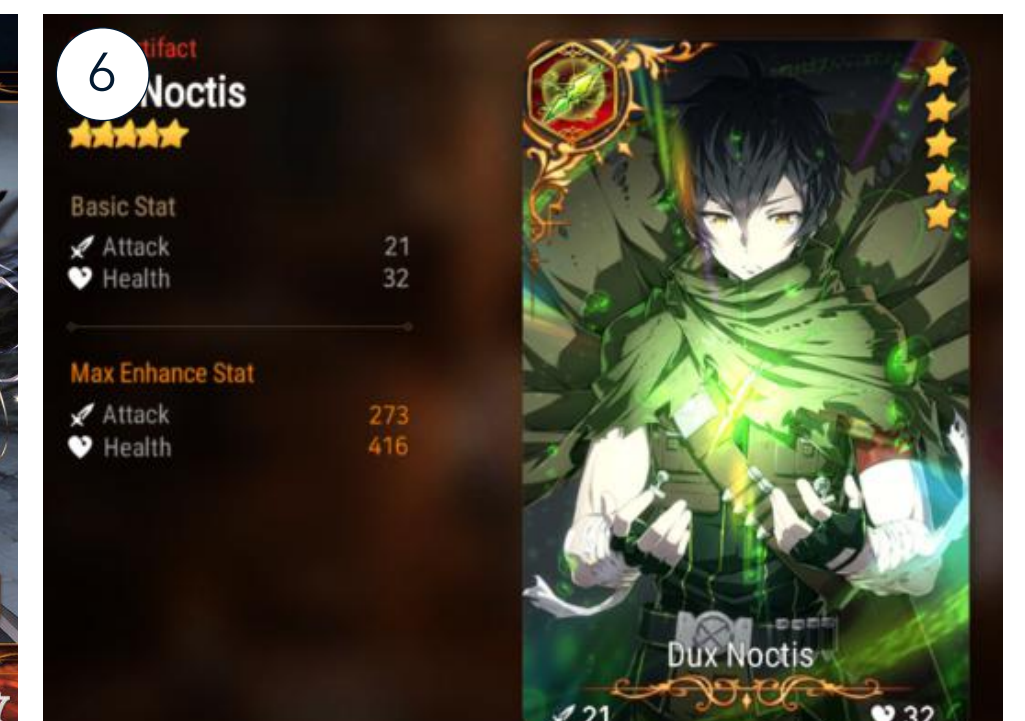
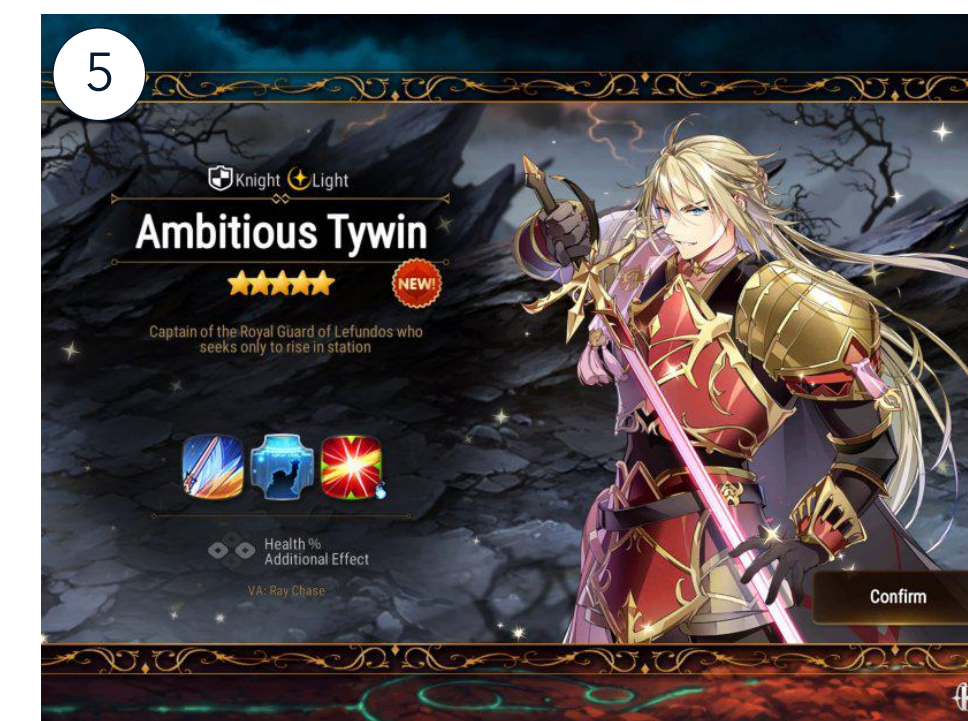
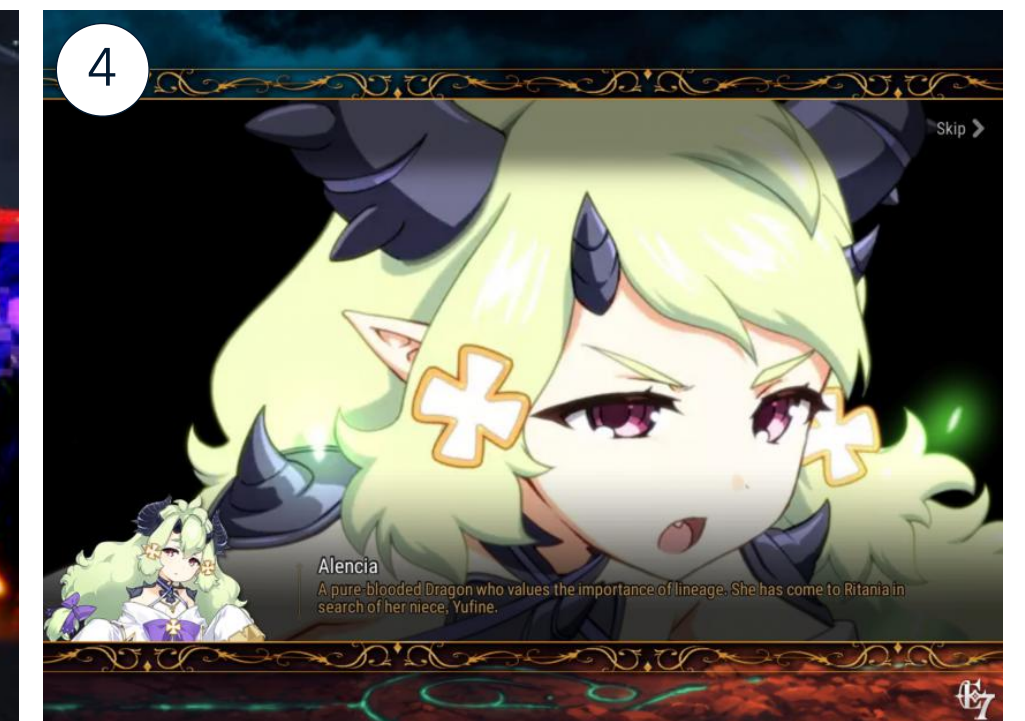
NEW CONTENT



CONTENT RELEASES I

RPG > Content > Abilities, Equipment, and Heroes

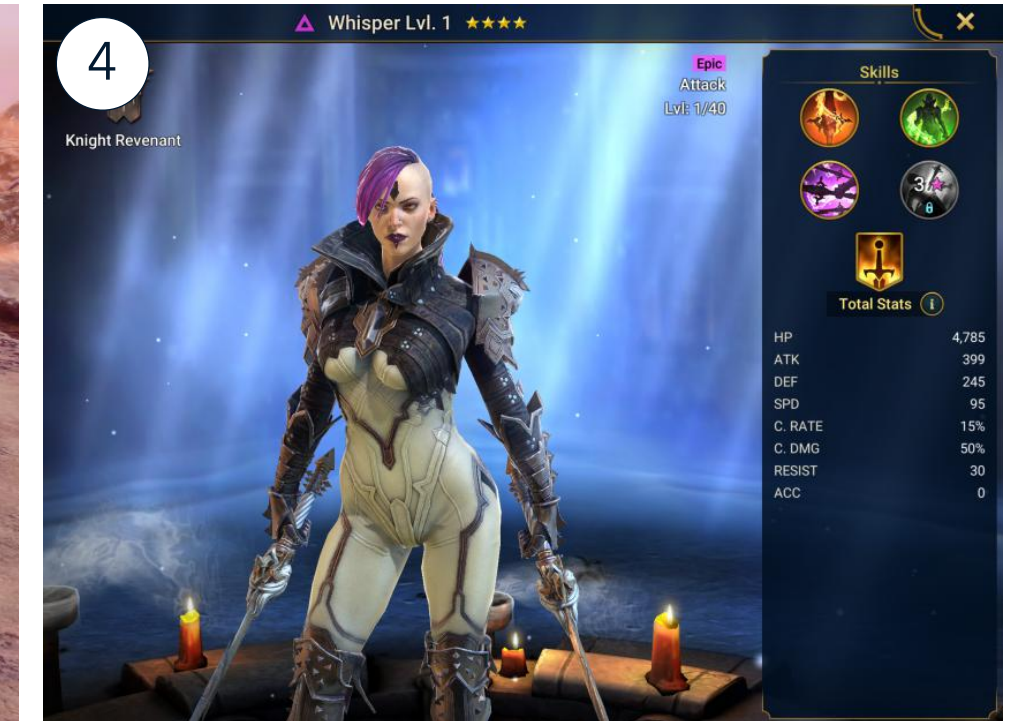
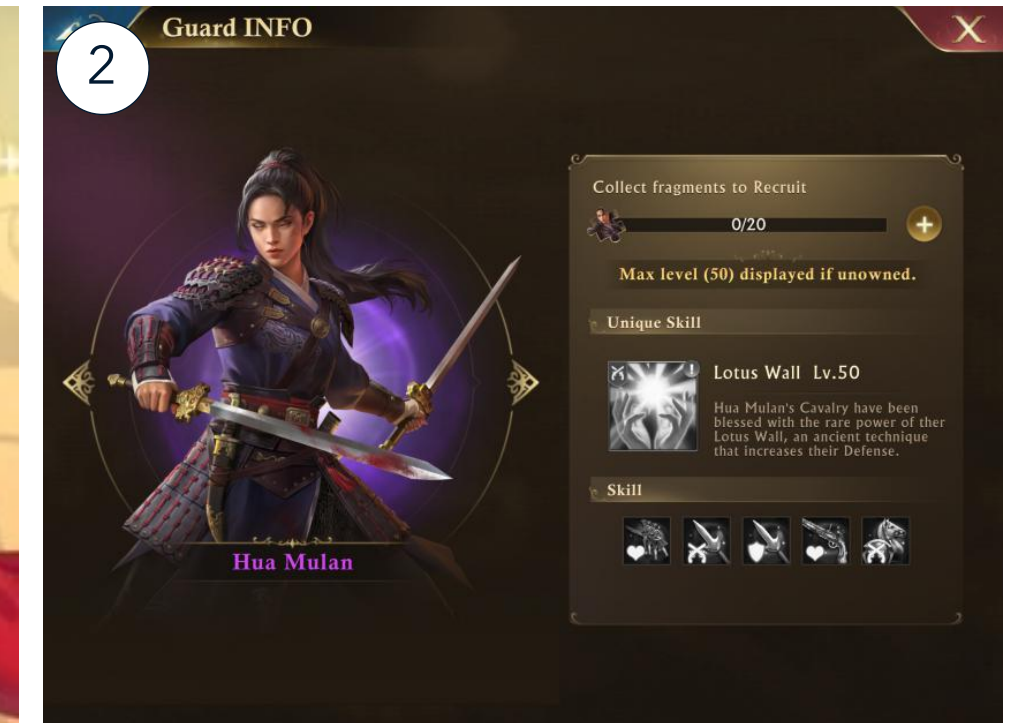
- 1/4: [Wu Kong](#) – AFK Arena hero (1)
- 1/17: [Skriath](#) – AFK Arena hero (2)
- 1/16: [Fierce Battle Summons](#) – BLEACH Brave Souls heroes
- 1/31: [The Machine Society Summons: Flower Festival](#) – BLEACH Brave Souls heroes
- 1/8: [Groooah!](#) – Dragon Ball Legends equipment
- 1/15: [Ultra Space-Time Summon #19](#) – Dragon Ball Legends heroes (3)
- 1/15: [No, You're Gonna Die! Memory No. 1](#) – Dragon Ball Legends equipment
- 1/22: [Fusion Reborn!](#) – Dragon Ball Legends equipment
- 1/22: [See ya!](#) – Dragon Ball Legends equipment
- 1/29: [Legends Rising Vol. 11](#) – Dragon Ball Legends heroes
- 1/29: [Awakened Come Out, Cowards! No. 1](#) – Dragon Ball Legends equipment
- 1/29: [Mind Your Own Business, Tin Men!](#) – Dragon Ball Legends equipment
- 1/1: [Vela](#) – Empires & Puzzles hero
- 1/2: [Alencinox's Wrath](#) – Epic Seven equipment
- 1/2: [Alencia](#) – Epic Seven hero (4)
- 1/9: [New Exclusive Equipment](#) – Epic Seven equipment
- 1/16: [Merciless Glutton](#) – Epic Seven equipment
- 1/23: [Ambitious Tywin](#) – Epic Seven hero (5)
- 1/23: [6 Types of 4-Star Artifacts](#) – Epic Seven equipment
- 1/30: [Pavel](#) – Epic Seven hero
- 1/30: [Dux Noctis](#) – Epic Seven equipment (6)



CONTENT RELEASES II

RPG > Content > Abilities, Equipment, and Heroes

- 1/11: [Luna Mastery Skills](#) – Final Fantasy XV: A New Empire abilities
- 1/14: [Ignis Mastery Skills](#) – Final Fantasy XV: A New Empire abilities
- 1/29: [Gladio Mastery Skills](#) – Final Fantasy XV: A New Empire abilities
- 1/1: [Renewed Spirits Heroes](#) – Fire Emblem Heroes heroes (1)
- 1/3: [Eir: Renewed Life](#) – Fire Emblem Heroes hero
- 1/7: [Weapon Refinery Update](#) – Fire Emblem Heroes abilities
- 1/9: [Heir of Light](#) – Fire Emblem Heroes heroes
- 1/20: [A Star Is Born](#) – Fire Emblem Heroes heroes
- 1/21: [Itsuki: Finding a Path](#) – Fire Emblem Heroes hero
- 1/30: [Líf: Lethal Swordsman](#) – Fire Emblem Heroes hero
- 1/20: [Hua Mulan](#) – Guns of Glory hero (2)
- 1/20: [Yi Sun-sin](#) – Guns of Glory hero
- 1/6: [Black Bolt](#) – MARVEL Strike Force hero (3)
- 1/10: [Yo-Yo](#) – MARVEL Strike Force hero
- 1/15: [Crystal](#) – MARVEL Strike Force hero
- 1/21: [Karnak](#) – MARVEL Strike Force hero
- 1/13: [Whisper](#) – Raid: Shadow Legends hero (4)
- 1/23: [One of Ten](#) – Star Trek Fleet Command hero (5)
- 1/22: [Vulnerable Debuff](#) – Star Wars: Galaxy of Heroes abilities
- 1/22: [Resistance Hero Poe](#) – Star Wars: Galaxy of Heroes hero (6)
- 1/8: [Monster Skill Balancing](#) – Summoners War abilities



MARKET WATCH



NOTABLE RELEASES I

App	Library	Description
AFK Arena	Heroes of Esperia competition event	<ul style="list-style-type: none">• Players battle each other in a league competition broken into six divisions (1 and video).• Divisions are determined by players' combat ratings.• Winning matches awards trophies.• Trophies promote players into higher divisions for improved rewards (video).
	Lunar New Year rewards event	<ul style="list-style-type: none">• AFK Arena's Facebook page posts daily redemption codes for seven days (2).• Players redeem codes in the app for rewards (video).
	The Elder Tree accelerator feature	<ul style="list-style-type: none">• Acquiring or leveling elite heroes awards Flawless Droplets.• Flawless Droplets level up a tree.• Leveling up the tree boosts all heroes' stats (video).• Defeating bosses in the Twisted Realm awards Twisted Essence.• Twisted Essence is used to level up five tree branches—one for each hero class.• Leveling up a tree branch increases that class' hero stats (3).
	The Twisted Realm club feature	<ul style="list-style-type: none">• Players compete in ranked leaderboards to deal the most damage to a boss (4 and video).• Bosses gain strength as their health meters decrease.• Each event awards five free boss battles.• Additional battles cost in-app currency.
Empires & Puzzles	Path of Valor challenge event	<ul style="list-style-type: none">• Daily and event-wide challenges award points that fill a meter (video).• Filling the meter advances players to the next level.• Each level unlocks two tiers of rewards.• Players must pay \$9.99 to access the premium rewards.

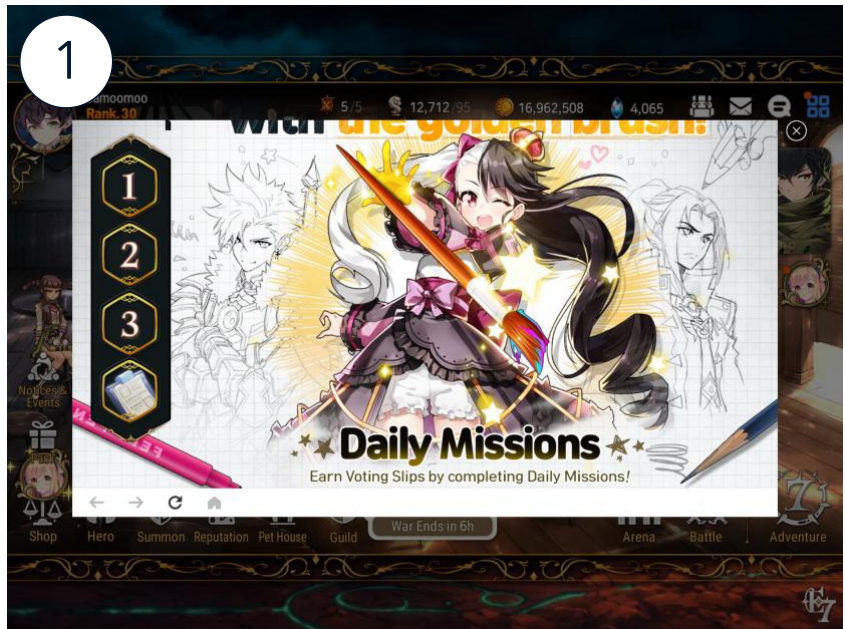


NOTABLE RELEASES II

App	Library	Description
Epic Seven	2020 Fan Art Contest Finals interaction event	<ul style="list-style-type: none">• Players submit and vote on fan art in a contest.• Daily challenges award voting ballots (1 and video).• Players can earn up to three voting ballots per day.
King of Avalon: Dragon Warfare	Stronghold Skin Star Benefit collection feature	<ul style="list-style-type: none">• Players collect stars by unlocking castle skins (2).• Players earn stat boosts for every five stars collected.• Stars earned from temporary skins disappear when the skins expire.
Last Shelter: Survival	Find Nian mini-game event	<ul style="list-style-type: none">• Daily challenges award card flips that reveal a picture (video).• Each card triggers a reward (video).• Uncovering the whole picture awards an event-exclusive decoration (3).
Star Trek Fleet Command	The Borg expansion feature	<ul style="list-style-type: none">• Players complete challenges during a series of month-long events.• Challenges award multiple event currencies at milestones.<ul style="list-style-type: none">• Epic Borg tokens unlock a special reward at the end of the three-month series.• Premium tokens require a \$19.98 purchase to redeem (4).

Quickly review all features and events

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



APPENDIX



PREMIUM PARTNERSHIPS

Liquid and 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>Market Research</p> <p>Quadrant Strategies</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>Player Personas</p> <p>Kinrate Analytics</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>Mobile App Store Intelligence</p> <p>Sensor Tower</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">▸ 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	Definitions
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	Definitions
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)

"Rather let me fail ... than never to have tried at all!"

– The Silver Surfer, *Silver Surfer* #1

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