LIQUID&GRIT

CORE REPORT

Competitive Research and Actionable Product Recommendations

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Check out our FAQ for guides on using our tools, understanding our classification system, and contacting support.

MAY

2023

HEADLINE RELEASE

Features, events, and seasons that boost revenue, retention, or downloads

Battle Pass Rebalance

Pass Royale 2.0 in Clash Royale

For more information on how we classify features, events, and content, please refer to the taxonomy guide within our FAQ.

PASS ROYALE 2.0 AND AN UPDATE FOR LOSERS

A battle pass update adds a second premium pass, triples the number of reward tiers, and puts all rewards on a single track. Completing seasonal events and progressing the battle pass grants tokens that players spend in a seasonal shop.

Pass Royale 2.0

An update to the Pass Royale battle pass introduces a second premium pass, the diamond pass, in addition to the existing gold premium pass and free pass. The gold pass costs $5.99 (it previously cost $4.99), and the diamond pass costs $11.99.

The number of reward tiers on the pass has more than tripled, and rewards from all three passes are now consolidated onto a single track (1). Players still progress on the battle pass by destroying enemy towers during matches but now earn additional progress for having their own towers remaining at the end of the match.

Certain rewards for completing the gold and free pass have been removed, including a rare item related to upgrades and a guaranteed hero card. The new diamond pass offers an exclusive hero card, emotes, rare chests, premium currency, and the app's first animated banner that displays before matches (2).

An Update For Losers

In a new seasonal event mode, players earn tokens by using resources, destroying enemy towers, defending their own towers, and winning matches in unique game modes (3). Tokens earned from matches are subject to a daily cap, which can be increased for one-day periods by spending premium currency. Players can also earn tokens through the battle pass, which are not capped. Players spend tokens in a new seasonal shop to buy items, currency, cosmetics, and emotes, but players can only buy a limited amount of each per season (4). At the end of the season, players' remaining tokens are converted to currency, and the shop's offers are refreshed.

See the Pass Royale and An Update For Losers galleries for more images and videos.

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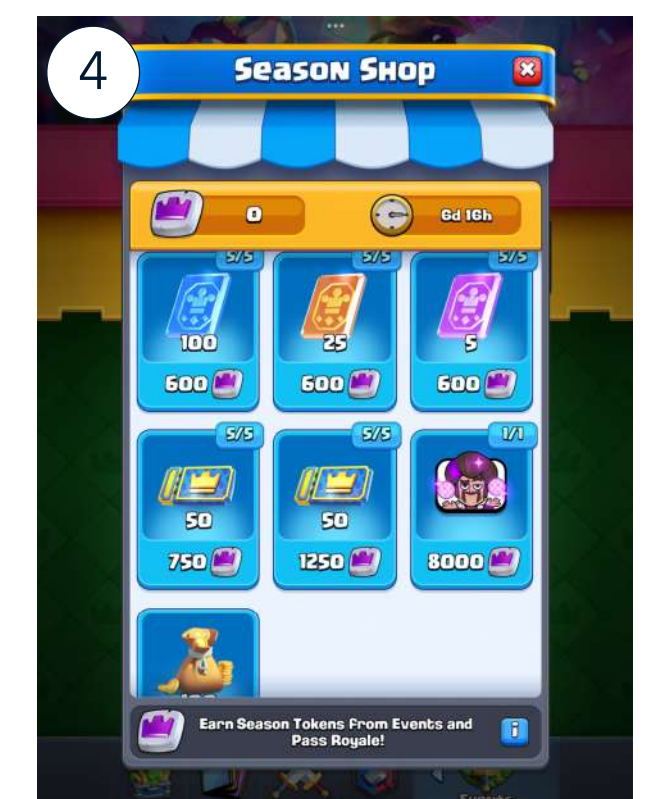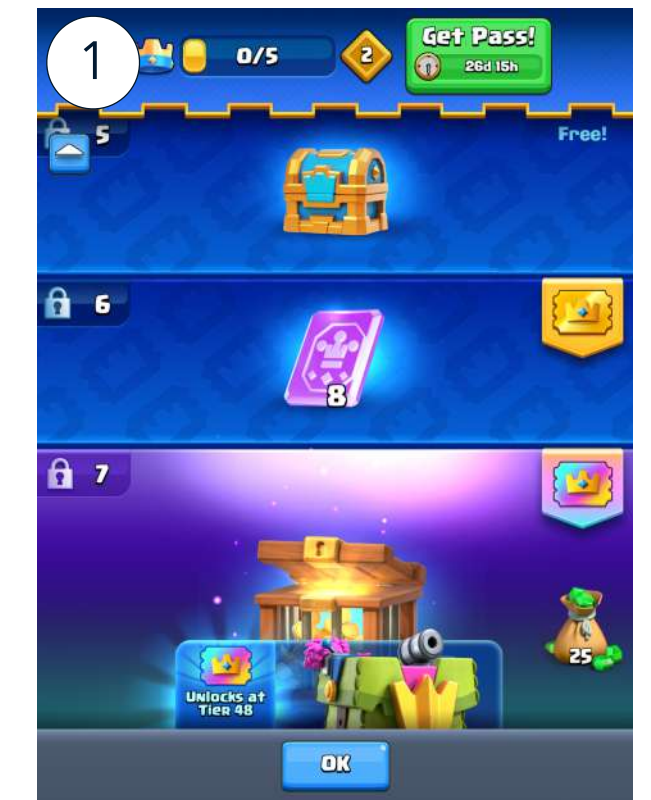
PRODUCT INSIGHTS

Pass Royale 2.0 and An Update For Losers come as Clash Royale faces monetization issues caused by slow player progression and a reliance on selling upgrades. Despite having the highest active users of any Supercell app, Clash Royale generates less than half the revenue of Clash of Clans, Supercell's top earner. We looked primarily at U.S. data for this analysis, but worldwide data is even worse for Clash Royale relative to the rest of Supercell's portfolio.

Clash Royale's issues stem in part from relying on paid card upgrades to drive spend. Clash Royale's cards are notoriously slow to upgrade, so players tend to upgrade fewer decks and stop spending once they've fully upgraded cards in their preferred decks. This problem is amplified by the fact that Clash Royale doesn't sell skins for its heroes and offers relatively few cosmetic items in its battle pass or IAP store compared to Supercell's other apps.

To increase spend, Pass Royale 2.0 reduces rewards that let players upgrade cards in both free and paid passes. An Update For Losers attempts to balance out this loss of valuable rewards by introducing a new seasonal shop where players can spend tokens to buy resources for upgrades. However, the shop only offers a limited quantity of each resource per season, and tokens earned from matches are subject to a daily cap that players can temporarily increase by spending premium currency (1). Supercell also stated that the reduction in rewards would allow them to offer resources for upgrades "at better prices for players outside of Pass Royale, like the Season Shop or the regular Shop."

After Pass Royale 2.0's big initial revenue impact, revenue receded quickly compared to other updates, and Clash Royale's active users decreased to its lowest point since September 2021. This drop in active users is likely due in part to negative player reactions to the update. Changes to Pass Royale made the pass less valuable to players, as high-value items that were previously included in the premium pass can now only be bought via IAPs. In spite of this, the price of the gold pass increased, and the new diamond pass costs over double the original price of the gold pass (2).

There's usually going to be some pushback against efforts to increase player spend, but Supercell may have made things worse by sending mixed messages about the update in their communications with players. Their initial announcement stated that the update was aimed at giving players "more bang for their buck," while their notes on the price changes a few weeks later said that items from the previous pass were too valuable.

Clash Royale's next step in adjusting its monetization strategy is to raise the level cap of cards for a second time. Clash Royale raised the level cap on its cards for the first time ever in October 2021, which brought about the app's highest ever revenue. In their 2023 roadmap, Clash Royale announced that another raise to the level cap would be coming alongside the release of a new gameplay feature. Because the revenue spike from the first level cap increase only lasted about three months, this upcoming update will need to include some kind of changes to the upgrade system to create a more enduring impact.

One possibility would be to follow the lead of another Supercell app, Brawl Stars, which introduced individual reward progressions and cosmetics for each hero in its Mastery feature. This approach not only adds a greater number of progressions for players to complete but also incentivizes players to use a wider variety of heroes. A similar strategy could help Clash Royale encourage players to use and upgrade more cards.

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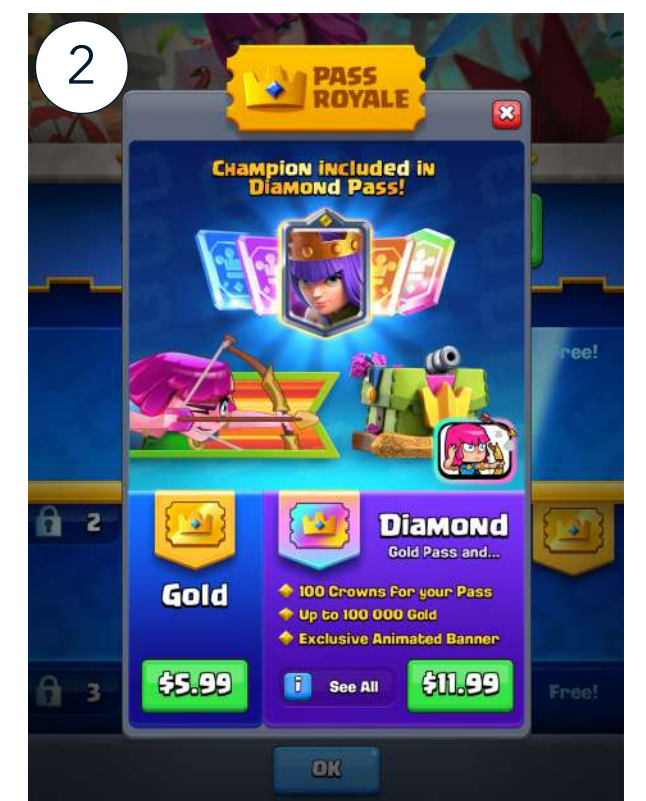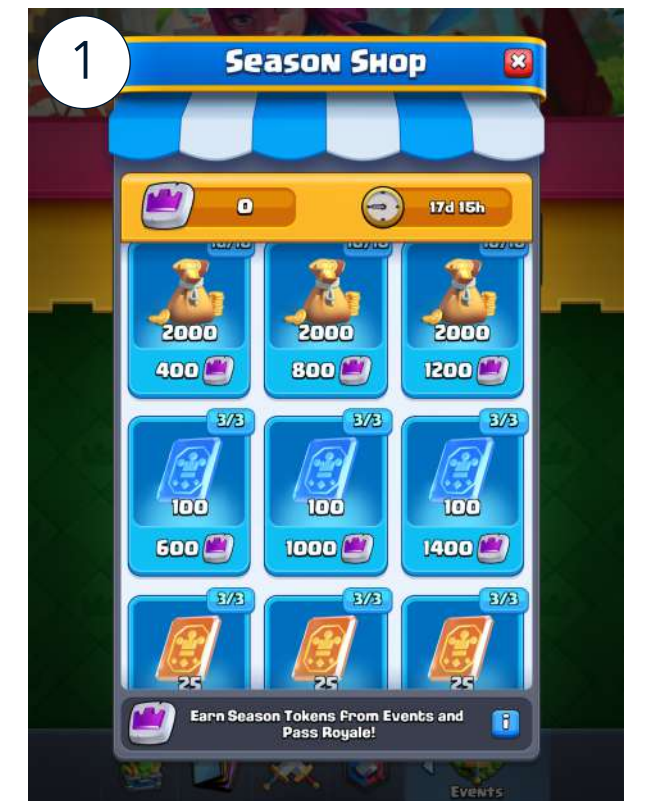
REVENUE ANALYSIS

After the release of Pass Royale 2.0, Clash Royale's revenue increased 41% MoM. This growth can be primarily attributed to Pass Royale 2.0 and the accompanying An Update For Losers expansion, as no other notable releases occurred during this period. We analyze this expansion in the next section.

Clash Royale

■ Revenue — Downloads

Pass Royale 2.0

An Update For Losers
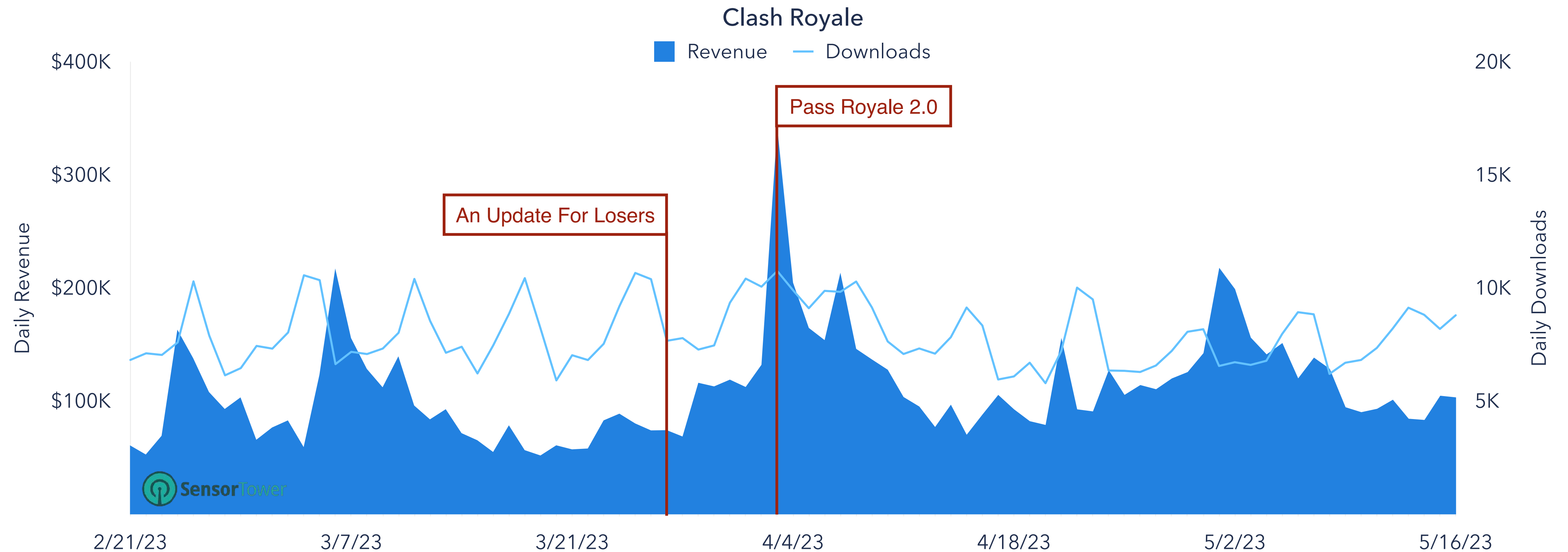
Graph data is iOS U.S. only.

MoM = Month over the preceding month.

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NOTABLE ADJACENT RELEASES

One week before the release of Pass Royale 2.0, Clash Royale released An Update For Losers, a related expansion that included challenge events and a new seasonal shop with seasonal tokens. Players earn tokens by progressing in the events and the battle pass, and they can spend premium currency to increase their daily cap on seasonal tokens for one day.

Release Date	Release	Release Type	New or Old
3/27/23	An Update For Losers	Expansion feature	New
3/27	Seasonal Challenge	Challenge event	New
3/27	Season Shop	Reward season	New
3/27	Season Tokens	Currency feature	New
4/3	Pass Royale 2.0	Mission season	New

This data can be found by using our Tracker tool, which provides live ops tracking data plus customizable notifications. To learn how to subscribe, please email Brett Nowak.

RELEASE TRENDS
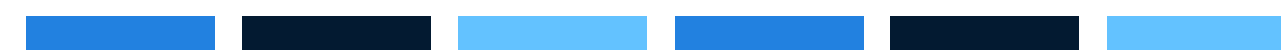
Trends for feature, event, and content releases

Includes data from more than 35 top-grossing apps in the core market

CORE SEASON RELEASES

Missions, which include battle passes, are the second most common type of season released by tracked apps in the core market, although challenges, rewards, and interactions are common as well. Seasons are mechanics that release reskinned iterations at regular intervals. The release counts below reflect entirely new seasons rather than individual iterations of seasons.

Season Type	Release Count
Challenges	21
Missions	19
Rewards	17
Interactions	16
Mini-Games	13
Clubs	9
Competitions	9
Expansions	8
Custom Design	1
Levels	1
Other	1
Quests	1

Data includes seasons released by tracked core apps between 5/1/22–5/1/23.

Mission Seasons by Genre and Subgenre

The real-time strategy subgenre, which includes Clash Royale, releases a higher than average number of mission seasons per app for both the strategy genre and the core market as a whole. The shooter genre releases the highest number of mission seasons.

Genre	Subgenre	Mission Releases per App
Shooter Total	**All Subgenres**	**1**
Shooter	FPS/3PS	2.5
Shooter	Battle Royale	1
Shooter	Vehicular Shooter	0.5
Strategy Total	**All Subgenres**	**0.44**
Strategy	Build & Battle	1.5
Strategy	Real-Time Strategy	1
Strategy	MOBA	0.5
Strategy	Card Battler	0.4
RPG Total	**All Subgenres**	**0.25**
RPG	Fighting	1
RPG	Survival	0.67
All Genres	**All Subgenres**	**0.5**

Data includes mission seasons released by tracked core apps between 5/1/22–5/1/23.
Table does not show subgenres with no mission releases during this period.

MARKET WATCH

New apps and notable releases from established competitors

Filter the Database Tool by month and year to see all new releases.

BREAKOUT APP

Honkai: Star Rail, the latest release in miHoYo's Honkai series, became the top-grossing RPG app within a mere three weeks of its launch. In this installment, players navigate a vast world map using an interstellar train, explore diverse planets, visit train compartments, and interact with passengers. The app offers rapid turn-based combat, excellent anime-inspired visuals, and an engaging storyline with full voice acting.

Honkai: Star Rail by miHoYo

Players use a train to travel between different planets on the world map (1). On the train, players can explore rooms and speak to passengers. Planets offer quests, combat challenges, and environmental puzzles. New locations unlock as players progress.


Players assemble a team of four heroes to use in turn-based combat (2). Each hero has an element, a class, and active and passive abilities. Players equip heroes with weapons and gear, which add unique buffs. Players earn more heroes through a gacha system.

In combat, heroes use basic attacks to damage opponents and use abilities to heal and buff allies (3). Using basic attacks fills an ability meter, and using abilities depletes it. Attacks and abilities fill an ultimate meter, which allows players to activate their ultimate ability when complete.

Players complete quests to level up heroes, earn equipment, and advance a narrative with full voice acting and cutscenes (video). Certain quests and mini-games progress character-specific storylines or other side stories.

Launch Information
- Released worldwide on 4/6/23
- 1st top-grossing RPG on the U.S. App Store as of 5/1/23
- Average U.S. daily revenue (past 24 days): $381,685
- Average U.S. daily downloads (past 24 days): 84,736
- View Honkai: Star Rail on the App Store and in our gallery

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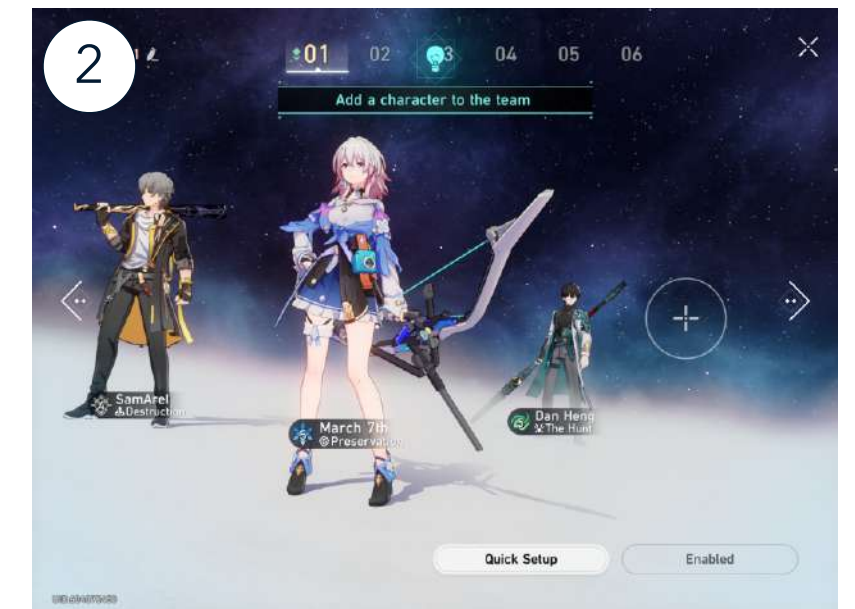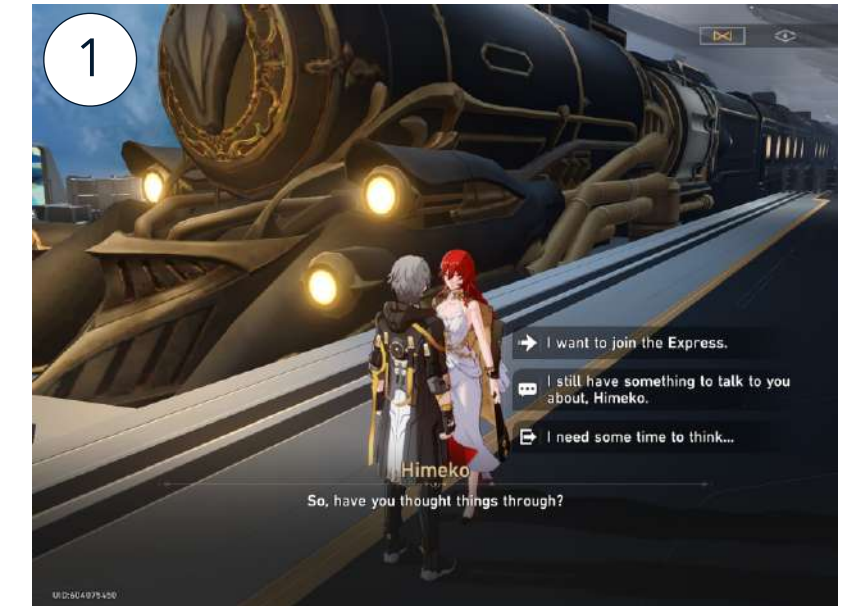
SOFT-LAUNCH APP

Gods and Demons: Legend has extensive progression systems that allow players to upgrade heroes, equipment, pets, companions, skills, talents, mounts, and more. The app focuses heavily on its core gameplay loop, which involves battling monsters in an arena to earn items for upgrades.
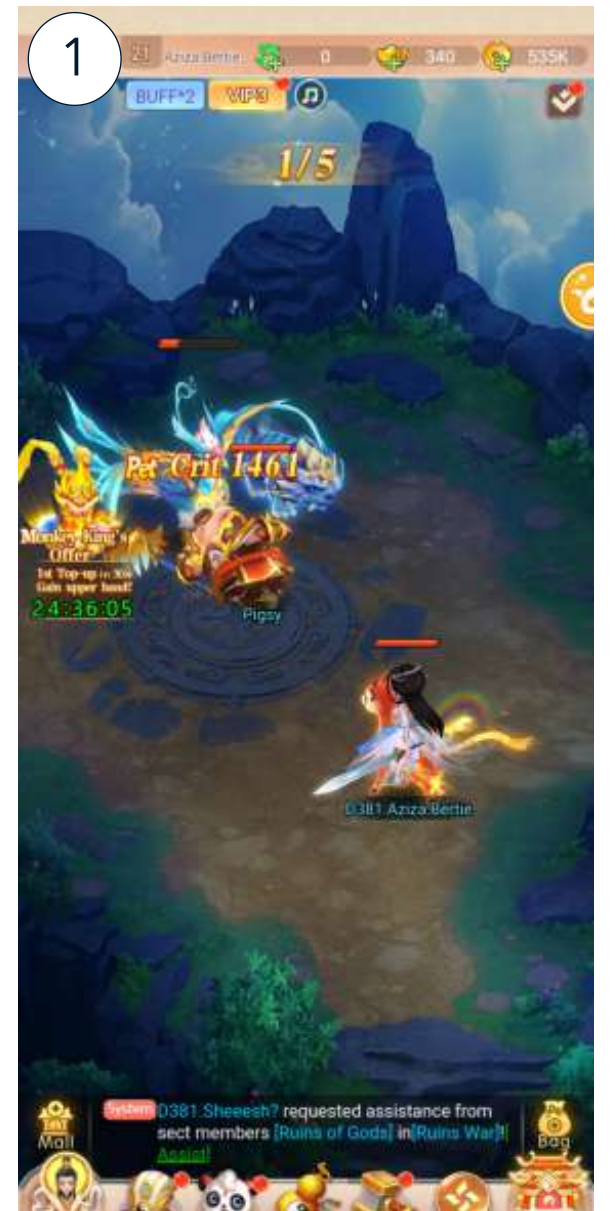

Gods and Demons: Legend by 炜仪 钟

Players select a hero with several abilities to use in auto-battles. Heroes have over a dozen stats, which include critical hit rate, accuracy, dodge rate, and resistance against certain damage types.

Heroes battle enemies in an arena to earn items, which include equipment, pets, wings, and mounts (1). Players can use their heroes in solo and team PvP modes.

Heroes, abilities, and items have upgrade systems, and certain upgrade systems include secondary and tertiary upgrade paths (2 and 3). Players upgrade heroes and items by spending currency, using certain items, or merging duplicates. As players progress, they unlock new abilities and upgrade systems.
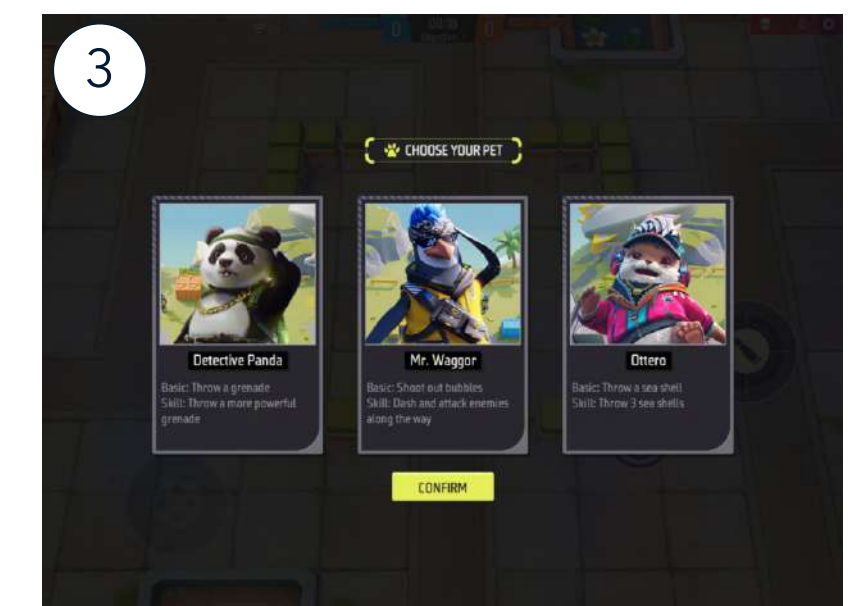

Launch Information
- Soft-launched on 12/11/22 in Australia, Indonesia, Malaysia, the Philippines, Singapore, and Thailand
- Average worldwide daily revenue (past 157 days): $1,541
- Average worldwide daily downloads (past 157 days): 333
- View Gods and Demons: Legend on the App Store and in our gallery

FEATURE AND EVENT RELEASES I

App	Release	Description
Brawl Stars	Bling currency feature	Players earn a new currency, Bling, by progressing on the app's battle pass, completing certain game modes and high-difficulty challenges, and leveling up heroes (1). Players spend Bling exclusively on cosmetics, such as skins, pins, sprays, and profile icons. Bling replaces an older currency, Star Points, and any collected Star Points convert to Bling.
Brawl Stars	Catalog exchange feature	A new shop allows players to buy nearly all available cosmetics except for certain event and battle pass rewards. Players can browse for cosmetics using various filters, such as item category, rarity, hero, or theme (2). Players spend premium currency or the new Bling currency to buy cosmetics. To buy hero-specific cosmetics, players must own that hero.
Garena Free Fire	Pet Smash expansion event	Players choose one of three heroes based on in-game pets to control in top-down 2v2 matches (3 and video). Each hero has a unique weapon, skill, and stats. Dealing damage fills a meter that allows players to use their skill when complete. Picking up items boosts damage. Teams win by reaching a certain number of kills or by earning the most kills when the match's timer expires.
Game of Sultans	Forest Tales club event	Players create or join a team with up to seven other players (4). Players receive food as a daily reward or spend premium currency to buy food. Feeding some types of food to animals awards points (video). Players use another type of food to prank other teams, which deducts points from the pranked team and grants points and rewards for the player's team. Teams that earn a certain number of points unlock areas with new animals. Leaderboards rank individuals and teams by points earned Players attempt to tame animals, and having more points increases the chance of success. Tamed animals periodically reward teams with tokens for an exchange shop, and rarer animals award tokens more frequently. Taming an animal triggers a cooldown period, during which opposing teams cannot tame the animal and allies cannot tame other animals in the same area.

FEATURE AND EVENT RELEASES II

App	Release	Description
Identity V	Version 2.0 cosmetic feature	An update overhauls the UI and lobby. Low-level players can now design custom rooms, a feature that was previously only available to players above level 60 (1). Players also receive a new hero, who is the main character in a story expansion.
LifeAfter	Escape Park expansion feature	Players choose from templates to create custom map designs. When designing, players fly a drone avatar to place spawn and end points, structures, moving objects, AI enemies, and decorations on the map (2). Players can set trigger points to activate the functions of certain objects. When finished, players publish their map to a catalog. In the catalog, players choose maps to participate in mini-game challenges. In the mini-game, players navigate obstacles from the spawn point to the end point to record their time (video). After finishing, players can give the map a "like." When players use and like a map, the designing player receives points that fill a meter. The meter grants rewards and increases map and object limits.
LifeAfter	Escape Plan mini-game event	Players complete base game tasks to receive clues for passwords. Players can also find passwords from other players on social media (3). Players enter passwords in spaces on a bingo card. After entering a password, players can share the password via social media. Players earn rewards for winning bingo and when other players use passwords they've shared.
PUBG Mobile	Trendiest Collector mini-game event	In a collaboration with toy company BE@RBRICK, players spend premium currency to spin two prize wheels (4 and video). Spins award BE@RBRICK-themed items, a voucher, or tokens to spend in an event shop that offers BE@RBRICK-themed items. The voucher allows players to prepurchase a 28cm PUBG-themed BE@RBRICK toy. A leaderboard ranks players by tokens spent in the event shop. The top 1,000 players receive vouchers to prepurchase a 70cm PUBG-themed BE@RBRICK toy.
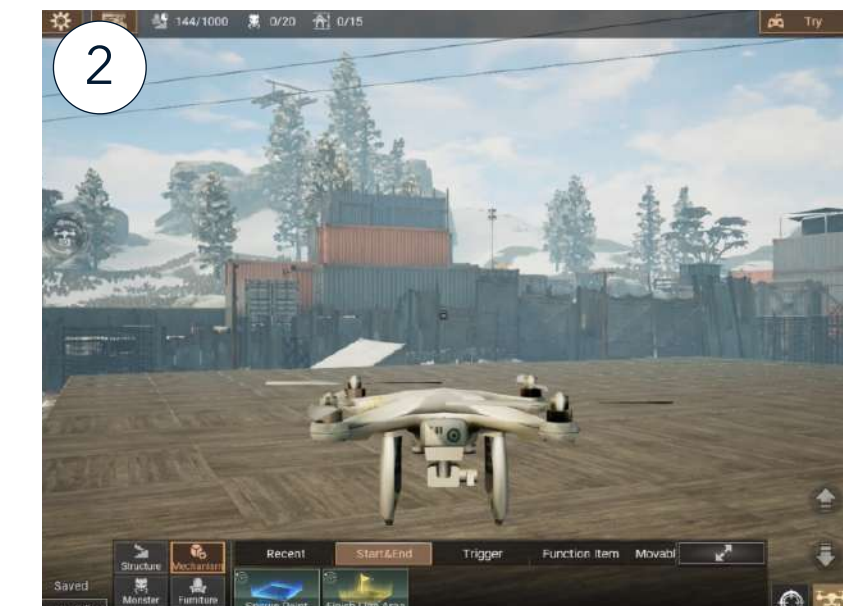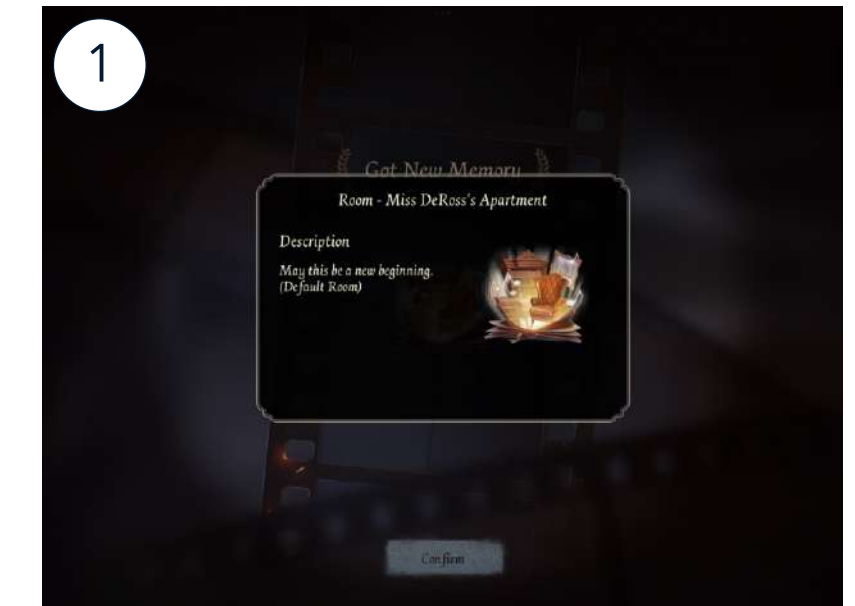
APPENDIX

TRACKED CORE APPS

Tracked RPG Apps

Black Desert Mobile, Cookie Run: Kingdom, Dragon Ball Legends, Dragon Raja, Empires & Puzzles, Identity V, Last Day on Earth, LifeAfter, MARVEL Strike Force, RAID: Shadow Legends, Star Wars: Galaxy of Heroes, and Summoners War

Tracked Shooter Apps

Call of Duty: Mobile, Garena Free Fire, Pixel Gun 3D, PUBG Mobile, Sniper 3D, Sniper Strike, War Machines, and War Robots Multiplayer Battles

Tracked Strategy Apps

Arknights, Art of War: Legions, Be The King: Judge Destiny, Brawl Stars, Clash of Clans, Clash Royale, Game of Sultans, Hearthstone, Lords Mobile, Magic: The Gathering Arena, Mighty Party, Mobile Legends: Bang Bang, Rise of Kingdoms, Star Trek Fleet Command, War Dragons, WWE SuperCard, and Yu-Gi-Oh! Duel Links

PREMIUM PARTNERSHIPS

Liquid & Grit partners with Sensor Tower to infuse our reports with industry-leading data and statistics.

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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.

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CORE MECHANICS TAXONOMY

Mechanic	Definition
Accelerators	Increase the power, impact, or efficiency of play
Banks	Save a percentage 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
Cosmetics	Improvements or updates to the app or a feature
Currencies	Changes to currencies, economies, stores, and items
Custom Design	Options to customize aesthetics
Exchanges	Shops that allow players to trade items or resources
Expansions	Additional rooms, worlds, play modes, VIP lounges, etc.

Mechanic	Definition
Flows	Specific flows, like the NUX, ratings, and surveys
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., scratch 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)

"I rarely end up where I was intending to go, but often I end up somewhere I needed to be."
– Douglas Adams

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