POWER-UP REPORT | JULY 2015

BUILDING AN EMPIRE

A SHORT HISTORY OF BIG HUGE GAMES’ CHART-CLIMBING DOMINATIONS
Contents

1. The Rise of Mobile Strategy Games
2. Mobile Strategy Games: A History
3. 5 Mobile Game Ad Design Tips from Zynga Pros
4. Strategy Game Retention & IAP Analysis
5. 5 of the Best Mobile Strategy Game Creatives
6. A Short History of Big Huge Games Chart-Climbing DomiNations
7. Game Design Lessons From Developers Doing It Right
8. Why Do Strategy Game App Store Icons All Look the Same?
9. Tap4Fun’s Invasion by the Numbers
This past Super Bowl was a defining moment for the mobile strategy genre. By this point, it was clear that mobile games—especially strategy games—were here to stay. Yet Helsinki-based Supercell took the genre to new heights when it aired a Clash of Clans TV ad starring Hollywood badass Liam Neeson in front of Super Bowl XLIX viewers across the globe.

Despite the successes of mobile strategy games so far, the epic of strategy games is still being written. In fact, the next wave of mobile strategy games is upon us. The first title of note to usher in the evolution was DomiNations from Nexon M and Big Huge Games (you can read more about DomiNations in this report). And sometime in 2015, the highly-anticipated Dawn of Titans from Zynga-owned NaturalMotion is expected to make a big splash in the mobile strategy genre.

Needless to say, all roads lead to strategy games, and that’s why we explore the empire of strategy games in this edition of the Chartboost Power-Up Report. We provide you with powerful data, advertising creative analysis and design tips, game design methodologies, a strategy game success story, and an exhaustive deep dive into the history of mobile strategy games. Use this report as your comprehensive playbook in your journey to building a successful mobile games business.
2  MOBILE STRATEGY GAMES: A HISTORY

The future couldn’t look brighter for mobile strategy games. Despite the fact that the entire genre is still in its infancy, the strategy genre is already one of the most popular as well as lucrative genres on mobile globally. Here are a selection of seminal events detailing the mobile strategy genre’s short yet electrifying existence.

A Thinking Ape’s Kingdoms at War
Supercell’s Clash of Clans
Disney’s Star Wars: Commander
2007

June 2007
Apple’s iPhone Goes on Sale
In the first 30 hours, Apple sold 270,000 iPhones.

July 2008
Apple Opens App Store
The App Store debuted with a catalog of 552 apps—135 of which were free apps.

2008

October 2008
Google’s Android Market Enters the Ring
Google’s Android Market debuted with over 50 apps, along with the launch of the T-Mobile G1—the first smartphone powered by Android.

September 2009
A Thinking Ape Launches Kingdoms at War
The fantasy strategy title, which features real-time combat and robust social features, was one of the first top-grossing strategy games.

2009

October 2009
IAP Now Available for Free iPhone Apps
Apple’s iPhone OS 3.0 opened the door to developers who wanted to use IAP in their free apps.

2010

January 2010
Haypi Kingdom Enters the App Store
MMO strategy title Haypi Kingdom was one of the first mobile games from a Chinese developer to consistently appear in the top 10 on the U.S. overall grossing charts.

October 2010
Valor Declares War on the App Store
Valor demonstrated that gameplay seen in browser-based strategy games can translate to mobile, which resulted in the title capping off 2012 as one of the top grossing apps.

November 2010
Kingdom Conquest Stakes Claim on Mobile
The free-to-play mobile strategy game was Sega’s most profitable property from 2011-2012, outperforming its renowned Sonic the Hedgehog franchise.

February 2011
Google Announces IAP Support
The search giant leveled the playing field for mobile game developers by rolling out IAP functionality for the Android Market.

March 2011
Amazon’s Appstore Opens to the Public
Amazon launched its own mobile app storefront, which is built on the Android platform, with 3,800 apps.

2011

October 2011
Amazon’s Appstore Opens to the Public
Amazon launched its own mobile app storefront, which is built on the Android platform, with 3,800 apps.
November 2011

Battle Nations Deploys on iOS
Z2's Battle Nations was one of the first turn-based strategy games to remain a top-grossing title for the better part of a year.

November 2011

Galaxy Empire Colonizes Mobile
In the time when Zynga's Draw Something was making all the headlines in early 2012, sci-fi strategy game Galaxy Empire from Chinese developer Tap4Fun was quietly one of the top grossing apps globally.

November 2011

The Hobbit: Kingdoms of Middle-earth Surfaces
In partnership with Warner Bros. Interactive Entertainment, Kabam released one of the first major movie tie-in mobile games.

March 2012

Crime City Breaks Into the App Store
San Francisco-based Funzio brought its hit title from Facebook to iOS. The crime-themed strategy game was an instant success on Apple’s platform, generating over a million downloads in its first few days of availability.

March 2012

Android Market Renamed Google Play
In an effort to meld disparate services, Google combined the Android Market, Google Music and Google eBookstore into one storefront, labeled Google Play.

March 2012

Kingdoms of Camelot: Battle for the North Arrives
The hardcore strategy title was Kabam's first game for Apple’s mobile platform. It capped off 2012 as the #1 grossing iPhone app.

March 2013

Empire: Four Kingdoms Wages War on Mobile
Free-to-play strategy title Empire: Four Kingdoms is one of the most successful and profitable mobile games from a German mobile game developer.

August 2012

Clash of Clans Sets Siege on the App Store
Helsinki-based Supercell’s village-building Clash of Clans would, three years later, become one of the highest-grossing mobile games of all time.

August 2012

Kabam's new game is one of the first major movie tie-in mobile games.

July 2013

Castle Clash Raids Google Play
By launching on Google Play, IGG created one of the first premier strategy games not to release on Apple’s platform first.
March 2014

**Boom Beach Storms the App Store**

Boom Beach became Supercell’s third fully launched game when it passed the Finnish studio’s notorious vetting process. The strategy game was an instant hit, ascending the top grossing charts in multiple countries.

November 2014

**Clash of Kings Invades Google Play**

Clash of Kings has reached the top 10 on the overall grossing charts (Apple App Store or Google Play) in over 80 countries, confirming there’s plenty of room for new strategy games to enter the competitive genre.

March 2015

**Dawn of Titans Soft Launches on Mobile**

At the tail end of Q1 2015, Zygia-owned NaturalMotion—creators of Clumsy Ninja and CSR Racing—soft-launched Dawn of Titans. The highly anticipated strategy game will try to differentiate itself from the pack with its high production value, sense of scale and simple swipe mechanics.

April 2015

**DomiNations Conquers the App Stores**

From the developers behind PC strategy stalwarts Rise of Nations and Civilization, DomiNations takes the best of mobile strategy games and blends it with tried-and-true mechanics from PC strategy titles.

May 2015

**Rival Kingdoms: Age of Ruin Stakes Claim**

Space Ape Games’ latest strategy game Rival Kingdoms: Age of Ruin blazed past the one million downloads mark in its first week of release.

July 2013

**Machine Zone Debuts Game of War: Fire Age**

Millions of dollars in revenue and one Kate Upton later, the strategy title cemented itself as one of the biggest hits the mobile gaming industry has even seen.

November 2014

**Disney Awakens Star Wars: Commander**

Disney threw its Jedi robes in the strategy genre Rancor pit with the launch of Star Wars: Commander. The Force was strong with the title, as it accumulated five million downloads in its first month of release.
Designing a mobile game is one thing, but crafting an effective creative? Quite another. Just ask the team at Zynga’s recently created Studio E, an agency-within-a-company dedicated to designing in-game ads. We asked director of design Matt Sharpe and lead product manager Agatha Bochenek to share their best practices for designing interstitials.
1 CLARIFY YOUR GOALS

Before getting started, identify the creative’s singular goal. Sharpe says this is crucial for prioritizing design elements. If the goal is conversion, for example, the headline and CTA will be critically important.

“When you don’t have a goal, when it’s not clearly defined, you end up designing for yourself and your tendencies and your habits, rather than delivering value to the user,” he says. “You also may end up putting a little bit more ‘sauce’ in the recipe than you need to.”

Tip: Once you’ve settled on your ad’s purpose, tell yourself that the only reason the screen exists is to achieve that goal. That will help you zero in on core design elements—whether it’s a CTA, headline or imagery.

Matt Sharpe
Director of Design, Zynga Studio E

2 IMAGINE YOUR GAME AT A DINNER PARTY

The best creatives feel like a natural segue in a conversation, rather than an abrupt change of subject, Sharpe says. But when you’re advertising a game, your ad will appear in a variety of different titles and you can’t rely on clever visual allusions to the publishing app—a challenge Sharpe likens to walking into a party where you don’t know the dress code.

“Present the brand in a manner that’s clear, concise, and aligned with whatever public persona or stance you may have,” he says. “You have to play the role of brand psychologist.”

Tip: Think about your game’s personality. Is it friendly? Brainy? Sophisticated? If you can translate these elements to the user via the interstitial, Sharpe says, you’ve done your job.

Agatha Bochenek
Lead Product Manager, Zynga Studio E
Bigger titles usually have brand color palettes, Sharpe says, which consist of two to five color swatches that make up the brand’s “personality.” The designer’s job, then, is to use these colors strategically, applying a working knowledge of basic color theory. Sharpe sticks to the following general framework: passive colors for background imagery, highly active colors for CTAs, and high-contrast colors for game titles.

“We call it the Jerry Bruckheimer philosophy, if something’s exploding, then we’re doing OK.”

And when it comes to imagery, keep in mind another secret of design pros: users generally respond well to faces. Whether it’s a smiling protagonist or a furious warrior, emotions tell a story that’s instantly engaging. For strategy games, Sharpe and Bochenek have also found that weapon imagery is particularly effective.

“We call it the Jerry Bruckheimer philosophy,” Sharpe says, “If something’s exploding, then we’re doing OK.”

Tip: Don’t have a brand color palette yet? Adobe’s Color CC tool will generate one based on a single color swatch (say, from your logo).
Even if you don’t have a big team and ample budget, Bochenek recommends doing click-tests with your creative team. Create a small set of creatives showcasing different characters, plot lines and key imagery, then see which one gets the highest clickthrough rate. That said, Bochenek cautions against going overboard with optimization. “There’s a law of diminishing returns,” she says. “Don’t spend time trying to get a teeny-tiny incremental percentage [when] you’d really be better suited just trying something fun and different.”

**Tip:** If you’ve made 50 versions of one creative and are obsessing about metrics, it may be time to step back and do something more dramatic than switching out imagery—such as showcasing a completely different gameplay element.
STRATEGY GAME RETENTION & IAP ANALYSIS
Brazilians had a penchant for strategy games in June, considering that Brazil displayed a near 50 percent D1 retention for the strategy category.

Following in Brazil's footsteps, close to the entire LATAM region embraced mobile strategy games, showing above average D1 retention across most countries in the territory.
Southeast Asian countries, including Indonesia, Malaysia and the Philippines, exhibited some of the highest D1 retention for strategy games.

Czech Republic, Croatia, Slovenia and other Central European countries registered notable D1 retention.

*Players in China can’t download games from Google Play, which is why we have no data for the country.*
Strategy games witnessed a higher payer conversion rate on Google Play over iOS in June.

Despite Google Play’s stronger conversion rate, the average spend per transaction was over $4 higher on iOS ($16.90).
ARPDAU was similar by day of the week among both hardcore mobile game categories, strategy and RPG, on iOS.

Similarly to ARPDAU on iOS, payer conversion rate for both strategy and RPG were much the same.
Google Play, however, revealed that ARPDAU for strategy was stronger every day of the week. On Fridays in particular, strategy ARPDAU was 28% higher than RPG ARPDAU.

Strategy game payer conversion rate on Google Play outpaced RPG across all days of the week in June.
All roads to your game lead from your creative assets. The best creatives don’t simply inspire a click, they educate players on what to expect in your mobile strategy game. Iterating on creative assets is an essential tactic for strategy games—let alone any game—so we’re analyzing our best assets to help put you ahead in the process. The following ads represent the best our strategy games have to offer, handpicked based on their ability to convert players.
Samurai Siege
Space Ape Games
Available on: 🍎

Stack of characters oriented toward the CTA and logo, training viewer’s eyes on the essentials while still looking exciting.

#EDB23B
#F4291D
#3E7DB0
#000000

Creates a sense of urgency, motivating higher install rates.

Gameplay screenshot ensures players are clicking because they know exactly what they’ll get.
Smash Monsters
A Thinking Ape
Available on: 

Complementary colors create harmony.

Depicts a scene with a sense of story and highlights diverse characters.

App Store badge confers legitimacy on the title as a “seal of approval.”
Empires of Sand
Codigames
Available on: 🍎 📱

Localized copy takes advantage of targeting.

Button capitalizes on human nature to "scan" images in a "z" pattern by placing the actionable element at the end of the scan.
Galaxy Empire
Tap4Fun
Available on: 🍎

Sci-fi theme is reminiscent (but not derivative) of pop culture sci-fi, subconsciously adding sense of familiarity to the game.

Five stars both attract attention because of complementary colors and strongly signify game quality.

CTA button matches aesthetic of game, priming players before hitting the App Store.
Tactical Heroes
eRepublik
Available on:

Multiple use of “tactical” improves viewer recollection and enhances ASO keyword optimization.

Discrete “arrow” leads directly to CTA button.

Screenshot of game is both beautiful and informative of gameplay elements.
In the mobile strategy genre, Clash of Clans remains the undisputed kingpin. But rather than simply emulate the chart topper, Baltimore-based Big Huge Games tried something different with DomiNations—creating a world history-based take on the popular genre.

The 37-person studio—with a team whose impressive pedigree includes seminal PC strategy titles Civilization II and Rise of Nations—teamed up with free-to-play expert Nexon to release DomiNations in April 2015. And they’ve collectively knocked it out of the park: The game accumulated 7.2 million downloads within its first 60 days, has earned glowing reviews and is proving incredibly addicting with both hardcore and casual gamers.

Big Huge Games co-founder Tim Train and Nexon director of product Josh Heenan walked us through the brief history of one of this year’s most exciting mobile strategy games.
Mobile and PC game development may be worlds apart, but mobile was too big an opportunity—and potential audience—for Big Huge Games to ignore. The studio wanted to share its passion for history (something often seen as a dry topic) with mobile’s large and diverse audience.

“We don’t really try to teach facts,” Train says, “but we do try to convey our love of history, and designing for mobile meant we could do so for a much broader audience than other platforms. In the old days, if one of our games sold two million units, that was a staggering amount—[but] with DomiNations we have a real chance to reach 100 million players or more.”
FORMING A DYNAMIC DUO

While Big Huge Games is well-versed in designing strategy games for PC, it needed a partner that’s a mobile gaming industry ace. California-based Nexon M—which is the mobile division of 21-year-old, free-to-play pioneer Nexon—was the right fit.

“For a game with such a broad topic and worldwide appeal, we also wanted a partner with global strength,” Train says.

Nexon brought its experiences from previous free-to-play strategy titles to DomiNations, including lessons on when to add as well as not add new features. It also provided mathematicians and economists that could help drive mobile game success.

“These roles definitely play a big part in making a successful mobile product,” Nexon’s Heenan says. “Not just with tuning games so they have strong retention and monetization, but also so they offer a great experience.”

Having access to sophisticated analytics allowed the team to identify an even pace at which to unlock and upgrade content, says Heenan, which keeps players engaged and constantly discovering something new. It also let them carefully calibrate player matchmaking to ensure fair (and satisfying) battles.

“For a game with such a broad topic and worldwide appeal, we also wanted a partner with global strength...”

Tim Train
Co-founder, Big Huge Games
Big Huge Games has a “jump in and start coding” approach to development, spending little time on “design bibles” and paper prototypes, Train says. Within weeks, the team had a playable version of DomiNations that it could then build on by playing, finding out what worked, and ripping out what didn’t.

“If you lather, rinse and repeat that process over a year or more, you have a high likelihood of a fun game,” Train says. “Then, put the game in front of actual users, see where they get confused or bored, and start iterating again to fix those issues.”

During development, for example, Train thought that players would get bored with the repetitive process of hunting, gathering and collecting goods. He assumed that the development team would have to automate the process or remove it from the game, but the opposite turned out to be true in user testing.

“[Now, it] drives an entire sub-economy that keeps me coming back several times a day to see what kind of loot I’ll get,” he says.
DomiNations monetizes entirely through IAP, but these aren’t pushed at users from the start. Instead, Nexon takes the slow-burn approach, building an audience first and hoping people buy into the experience once they’re sufficiently invested. They’ve consciously avoided incorporating early monetization barriers.

“Our goal is always to give players a great in-game experience that makes them want to come back again and again,” Heenan says. “We spend the time crafting a quality experience and believe that if players come along and enjoy the ride they will eventually invest.”
Going forward, Big Huge Games has prepared future DomiNations updates which have been informed by suggestions from fans. It’s testament to the more fluid, ongoing development process that’s needed with mobile games.

“We listen carefully to players and read forum posts, reviews, and messages to the company with an eye towards improving the game,” Train says. But he stopped short of revealing exactly what we’ll see from DomiNations as Big Huge Games continues to challenge the strategy game market leaders by drawing inspiration from the past.

CROWDSOURCED EVOLUTION
While every game stands on the shoulders of giants that have gone before, it’s deviation from a genre’s conventions that makes the most successful titles stand out. Here, the minds behind some of 2015’s hit games tell us what they consciously did to differentiate themselves from the crowd.
We encouraged a more community-focused game with guild wars. Players in these guilds (which have up to 30-plus players) will bid on a particular region with their guild development points and then the top two bidders for the week get placed in a war against each other that determines who controls the region. Once those top two guilds are determined, they can set up one vs. one and three vs. three PvP battles. It’s developed a huge metagame of guilds deciding where to send their weakest and strongest players.

"Taichi Panda"

by Snail Games

How Guild Wars Drive Retention

"We encouraged a more community-focused game with guild wars. Players in these guilds (which have up to 30-plus players) will bid on a particular region with their guild development points and then the top two bidders for the week get placed in a war against each other that determines who controls the region. Once those top two guilds are determined, they can set up one vs. one and three vs. three PvP battles. It’s developed a huge metagame of guilds deciding where to send their weakest and strongest players."
In other games, you only see your camp—you go to another one in matchmaking. [But] I think that the way to make very social games is to not separate the logic from the visuals. The difference in Dwarfs & Dragons is that when you enter, you share an island with other users. You can see the other neighbors around you (they’re like small villages in a great big island). There are also trees, rivers and structures that you can use to defend yourself—so every defensive and attacking strategy is absolutely unique.

Gonzalo Fasanella
Director of Marketing, Omnidrone
A Playful Take on the Genre

“What we realized (with some soul-searching) is that our game isn’t [actually] about crafting and building, it’s about having a particular kind of Minion fun—the type 12-year-old boys get into without their parents around. We translated that into the mechanics of the game (for example, how would a Minion make a Freeze Ray? Why, combine a slingshot with an ice cube, of course). And we use “fun” as our “XP,” and allow the players to throw a party when they’ve accumulated enough (rather than just use levels). Those parties become a big marker of how deep into the game the player has progressed.”

Chris Fortier
Lead Product Manager, EA Mobile
Looking at the app stores, you’d think screaming dudes were going out of fashion.

The app icons for strategy games such as Clash of Clans, Game of War: Fire Age, Clash of Lords 2, Battle Nations and This Means War! are all strikingly similar: a full-face portrait of an angry guy yelling at something just out of frame. With discovery such a big issue in mobile gaming—where around 500 iOS and 250 Android games launch daily—it’s curious that so many games present the same first impression to potential players.

What’s the deal? We asked designers why this sullen image is so prevalent in mobile gaming, and their thoughts were pretty revealing.
The Amazing Power of Faces

Faces are powerful, and designers take full advantage of that fact. As a species, we’ve evolved to recognize faces and emotions to help us breed and survive. Even 7-month-old infants respond strongly to images of angry human faces. Using a face in an icon is a great way of generating instant impact and memorability, according to Andrew Smith, producer at creative studio Sugarway. He says the trend links back to some of the age-old secrets of magazine cover design.

Imprinting your app store icon in someone’s memory is much easier to do with a human-like character than an inanimate object. And while a face looking directly at you is the most powerful image type—particularly one with dilated pupils (or “bedroom eyes”)—using an angled and expression-filled face helps convey the ideas of action and emotion to potential players.

You’ve Got One Shot—Make It Count

Artist and writer Stephen Kleckner says it’s important to realize how limited the tiny app store icon canvas is for designers. They have “one sideways glance to compel your brain to stop and notice their image,” and they have to make it count. Going with a human face maximizes the designer’s chance to make this instant impact.

As for what Kleckner calls the “RAAAAR!” face, he says it’s a widely overused trope but it’s also a “cheap and easy” way to convey action and emotion. The fact that these characters are yelling at something out of frame also invites us to investigate the mystery of what lies beyond: “To figure out what the hell they’re looking at.”

Me-too Mentality

Copying a trend in a crowded market isn’t always the smartest move, but the human face is such an “eyeball magnet” that trying something new is risky, Kleckner says. It’s also likely that game studios want to ape established big hitters such as Clash of Clans. Mimicking Clash of Clans’ angry-faced logo is one small way of trying to emulate its success.

“I’ll eat my imaginary hat if a good chunk of the people in the app store saw that a successful game used a certain type of face and didn’t say, ‘You see their sales numbers? See their retention rate? Do what they’re doing!’” Kleckner says. “Take our main character, open his mouth, and make an icon out of that!”
Tap4Fun’s Invasion is one of the latest mobile strategy games to galvanize iOS and Google Play users across the globe. The strategy title has already established quite the military empire so far, racking up over 2.6 million players. Check out this Invasion infographic that tallies all of the battles logged, troops trained, resources collected and more.
TAP4FUN’S INVASION BY THE NUMBERS

2.6+ MILLION TOTAL PLAYERS

PLAYERS FROM 132 COUNTRIES

2.5 ATTACKS LAUNCHED DAILY PER PLAYER

DAILY RESOURCES COLLECTED PER PLAYER

11K+
13K+
13K+

9K+

3K+

CASH
IRON
FOOD
ENERGY
OIL

DAILY VEHICLES DEPLOYED PER PLAYER

275+ MAMBAS
881+ VULTURES
882+ MANTISES
910+ POLAR BEARS