

PaD dissected



An Outsiders Analysis

By Teut Weidemann
Consultant for Online Games & Monetization

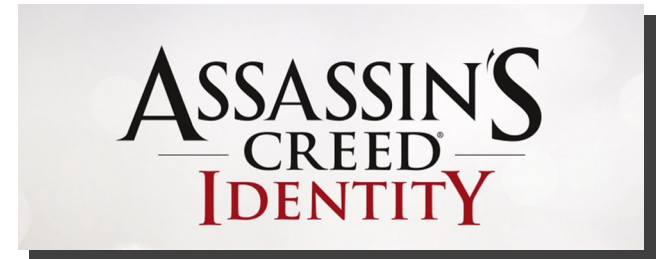
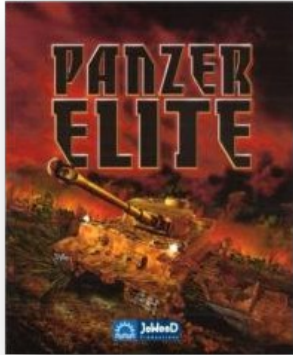


Who am I

- Working on Games since the 80's
- Over 100 titles on C64, Amiga, Atari ST, PC, Consoles, Online Games
- Jobs: Graphic Artist, Programmer, Designer, Development Director, CEO, CTO
- Consulting as Online Games & Monetization Expert
- Senior Online Games Supervisor @ Ubisoft Blue Byte
- Teaching “games” at various Universities
- Companies: Rainbow Arts, Softgold, Lucasfilm Games, Apple, Microsoft, Wings Simulations, Psygnosis, Jowood, CDV, Ubisoft
- Frequent speaker at various conferences and events



Career Highlights



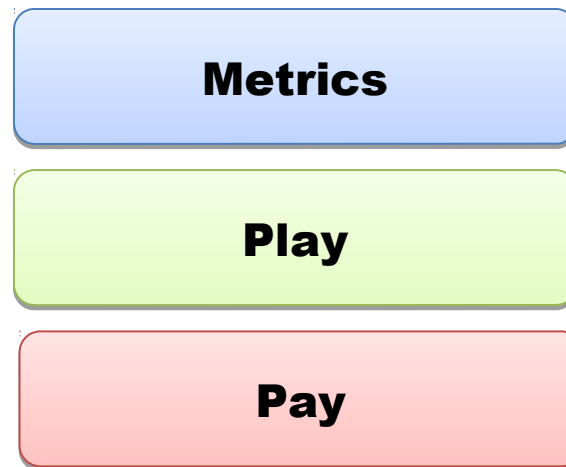
How I Dissect

Metrics

Play

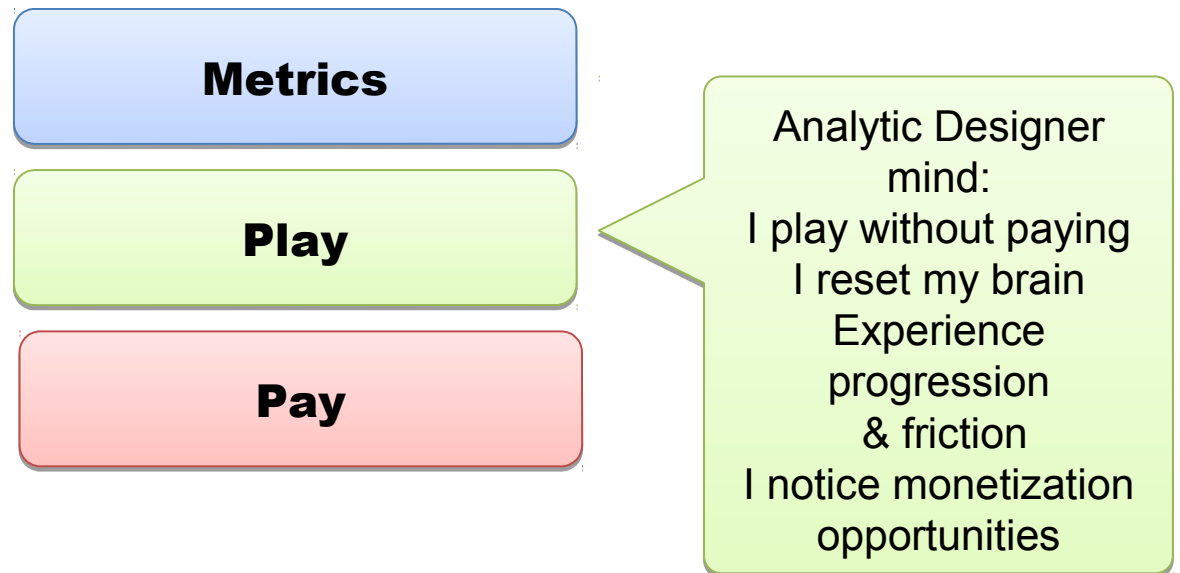
Pay

How I Dissect

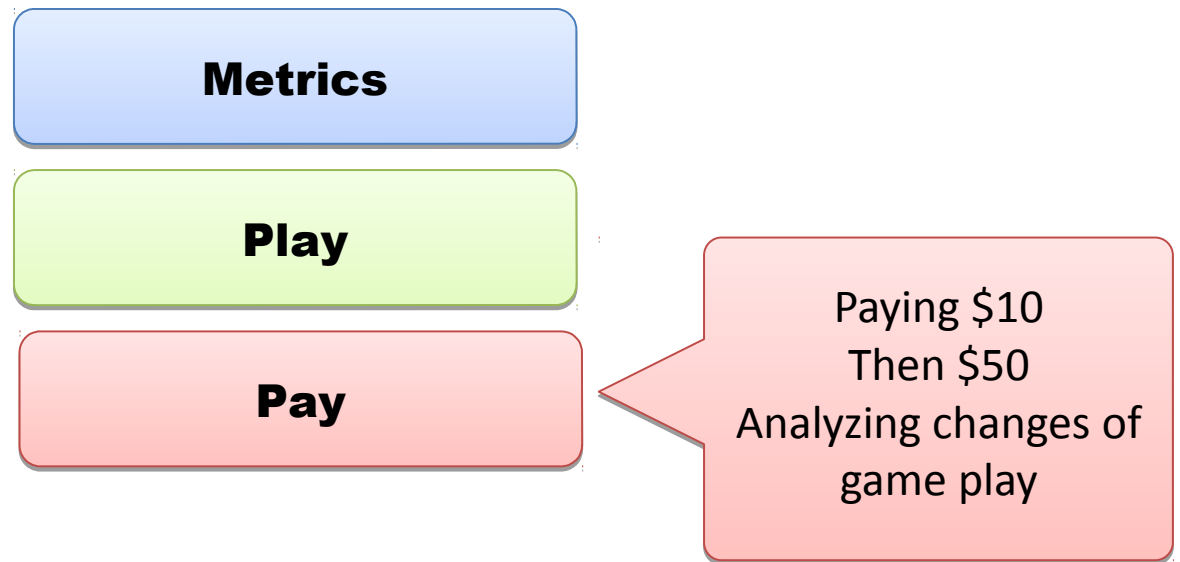


I use public tracking tools
I research the companies talks & PR

How I Dissect



How I Dissect



PaD in a nutshell:

Pokemon



RPG



Match 3 as Combat



Remember Puzzle quest?



PaD in a nutshell II

May 2013:

Puzzle & Dragons has proven to be the company's biggest win, and now sits at 13 million players in Japan alone, earning the company \$113 million in April alone, which equates to over \$3.75 million a day.

After an exciting year for the mobile gaming sector, GungHo Online announced its annual results. The Japanese corporation posted \$1.5 billion in 2013 revenues, with their hit game Puzzle & Dragons generating the largest portion of that sum, and \$755 million in revenues through the Google Inc (NASDAQ:GOOG, GOOG message board) Android store alone.

Sept 2014:

According to an announcement from the company today, Puzzle & Dragons was downloaded five million times in North America last week (September 16)

Oct 2014:

October 25, 2014 2:00 am JST

Game developer GungHo seen with record operating profit

TOKYO -- Japanese game developer GungHo Online Entertainment apparently logged a consolidated operating profit of around 75 billion yen (\$687.8 million) for the **first nine months**, up 10% on the year for a new January-September high. The profit increase was driven by fee revenue from the company's main breadwinner, the popular smartphone game "Puzzle & Dragons." Sales rose an estimated 20% to 140 billion yen, also a record high, **as downloads in Japan reached 30 million by the end of September.**

Users in other parts of Asia and North America are growing in number, adding to this revenue.

PUZZLE & DRAGONS

Jp Dominance ... but in USA?

METRICS



Puzzle & Dragons (English) [App]

Store [iOS Store](#)  Price **Free** Compatibility **UNIVERSAL** Publisher **GungHo Online Entertainment, Inc.**

Unified App **Puzzle & Dragons (10 apps)**

App Franchise **N/A**


Rank History

☐ Device

iPhone

 Countries

United States

 Date Range

Sep 26, 2014 ~ Oct 25, 2014

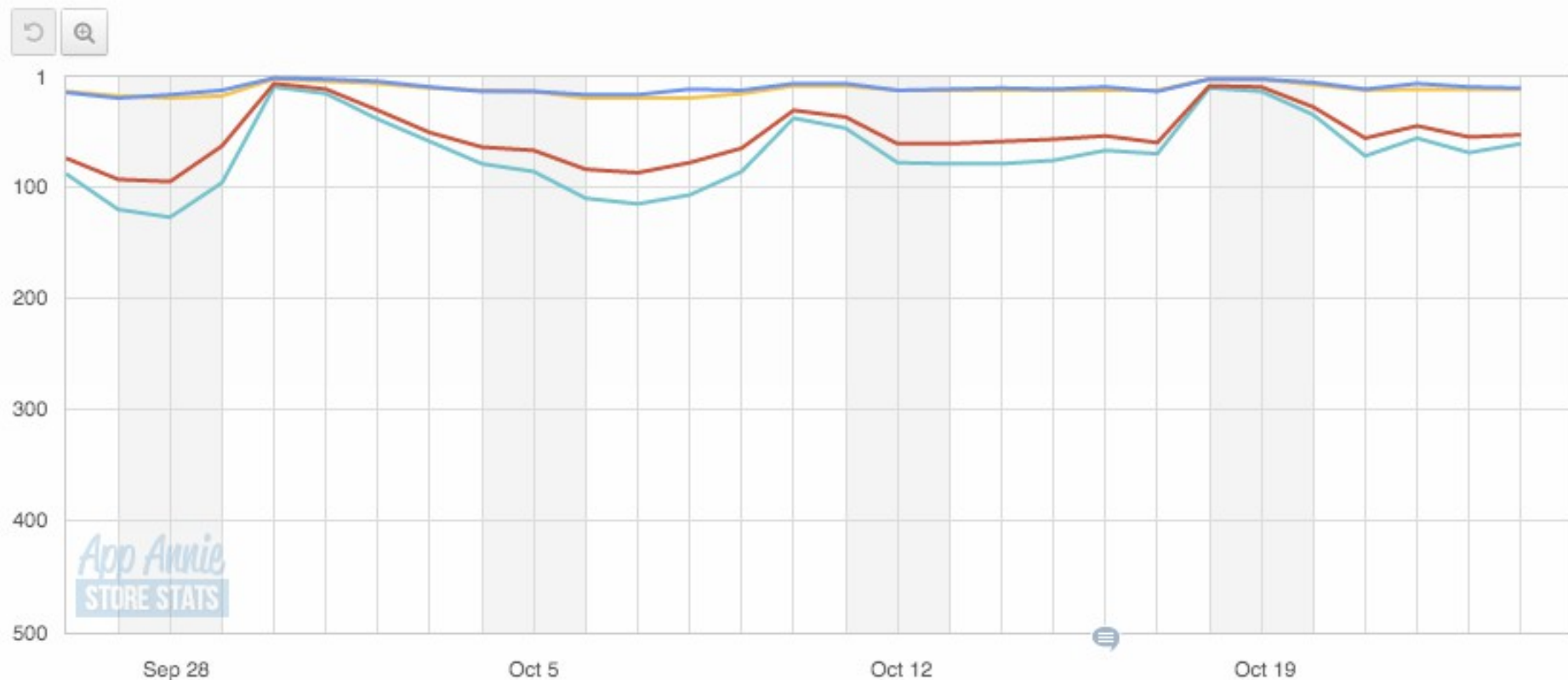
iPhone - United States - Sep 26, 2014 ~ Oct 25, 2014

Download Ranks

Grossing Ranks

Hour

Day



☒ All

☒ Overall

☒ Games

☒ Puzzle (Games)

☒ Role Playing (Games)

☒ United States

 US-Overall

 US-Games

 US-Puzzle (Games)

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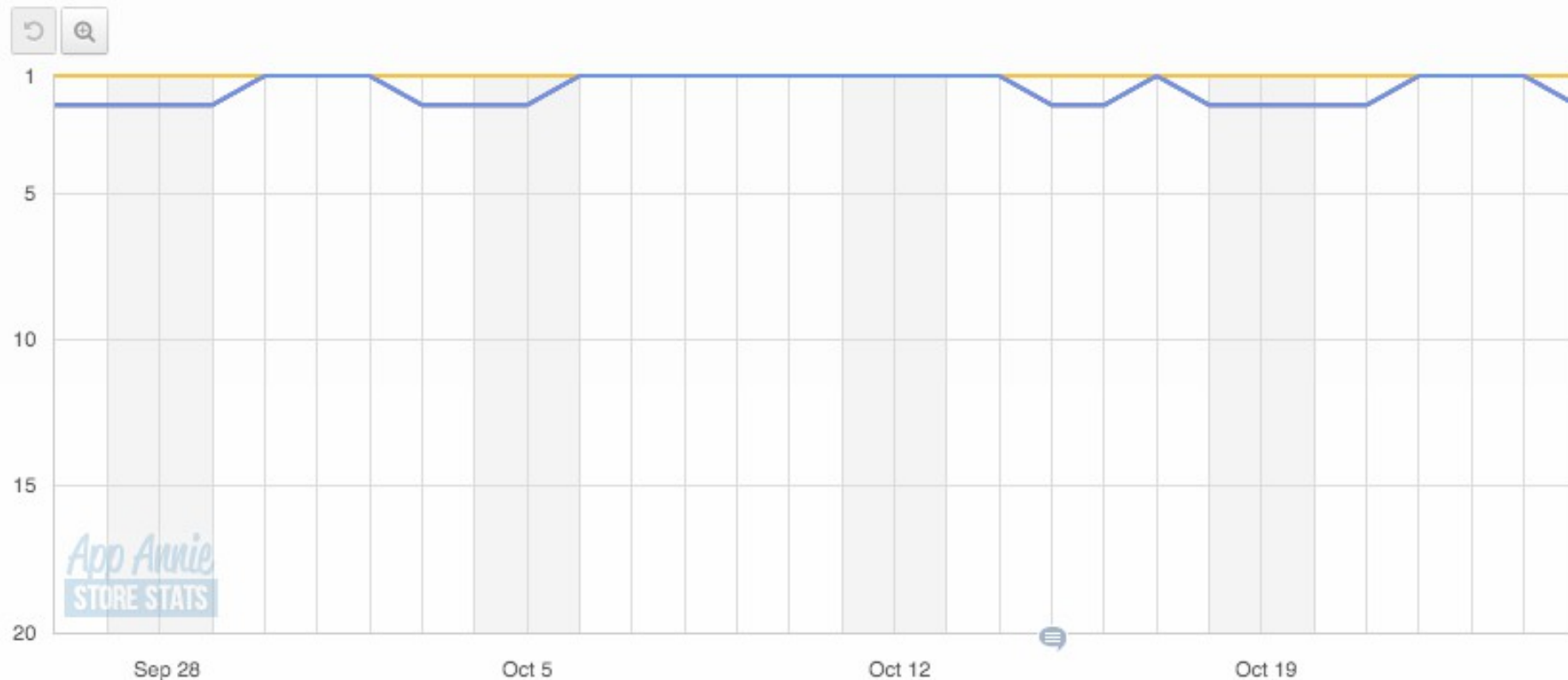
iPhone - Japan - Sep 26, 2014 ~ Oct 25, 2014

Download Ranks

Grossing Ranks

Hour

Day



☒ All ☒ Overall ☒ Games ☒ Puzzle (Games) ☒ Role Playing (Games)

☒ Japan ☒ JP-Overall ☒ JP-Games ☒ JP-Puzzle (Games) ☒ JP-Role Playing (Games)

PUZZLE & DRAGONS

RPG?

GAME PLAY



Game Loop



Assemble Team



Select

- 1 Leader
- 4 Members
- Limited by “total cost”
- “Total cost” grows by player level

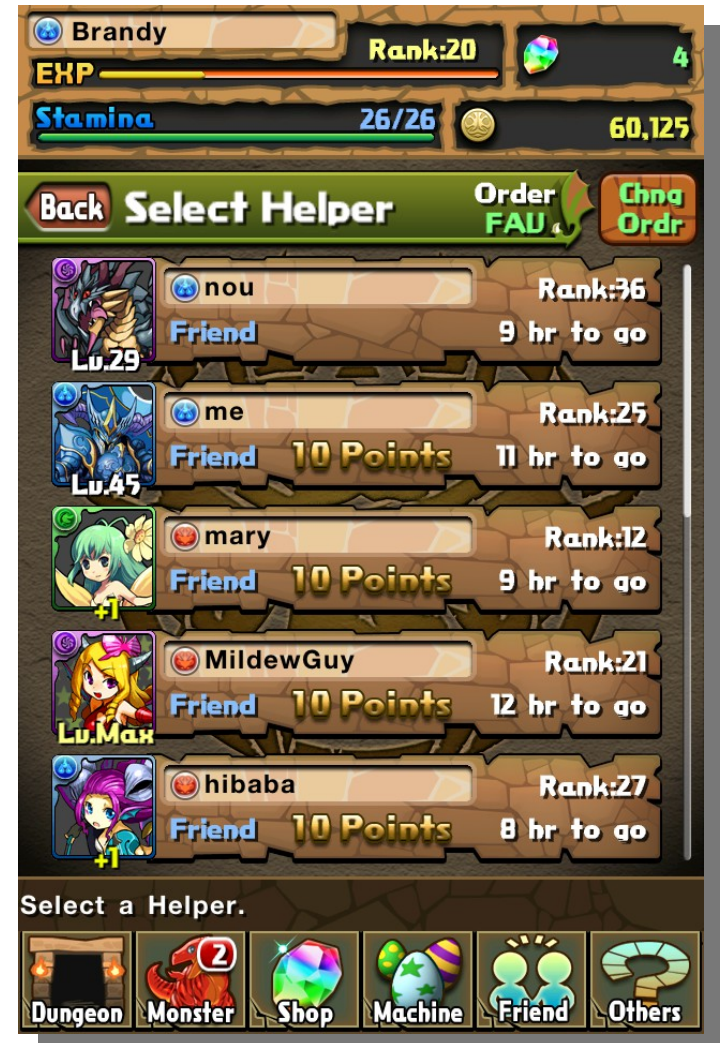
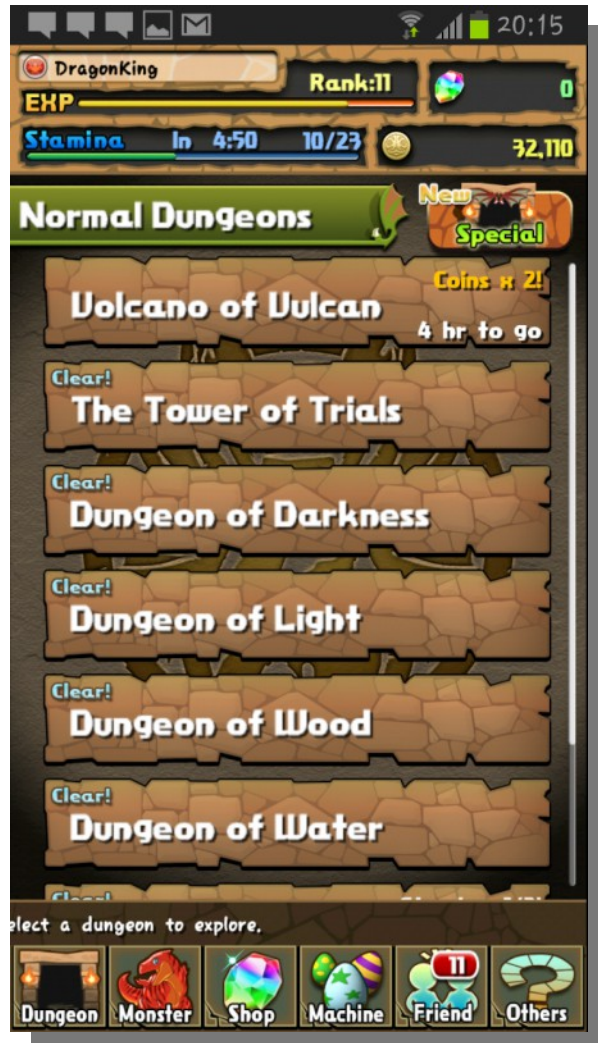


Assemble
Team



Select & Fight
Dungeon

Select Dungeon



Assemble
Team



Select & Fight
Dungeon



Life Demo

Assemble
Team



Select & Fight
Dungeon

Combat Functions:

- Combos 3+ = Base Damage
- Per color for each Monster
- Combos= Damage Multiplier
- 5x Match = AOE
- Monster Vulnerabilities
R->G->B->R with S/L on the side
- <3 heals you
- HP=added HP of your team
- Each x Attacks Skills activate
- If you die & quit you lose all from this dungeon!



Assemble
Team



Select & Fight
Dungeon



XP, Eggs, Gold
as reward



Completion Reward

- Departure Tower
Tower Entrance -

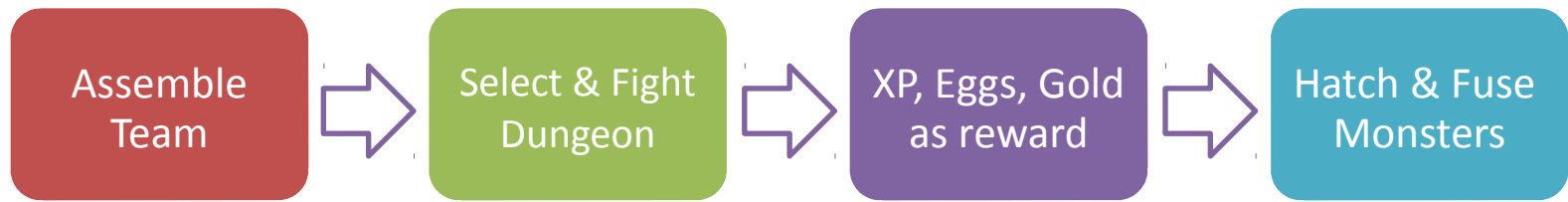
Coins Acquired 90

EXP Acquired 51

To the next Rank: 2,110

Monster(s) Acquired



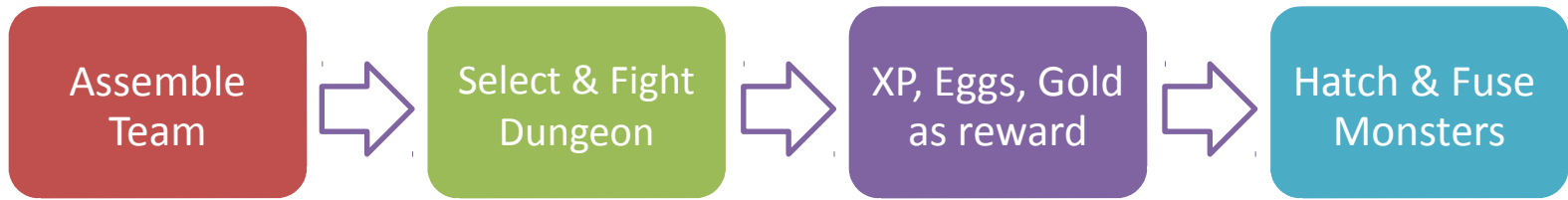


Egg Sources:



Gold sink!



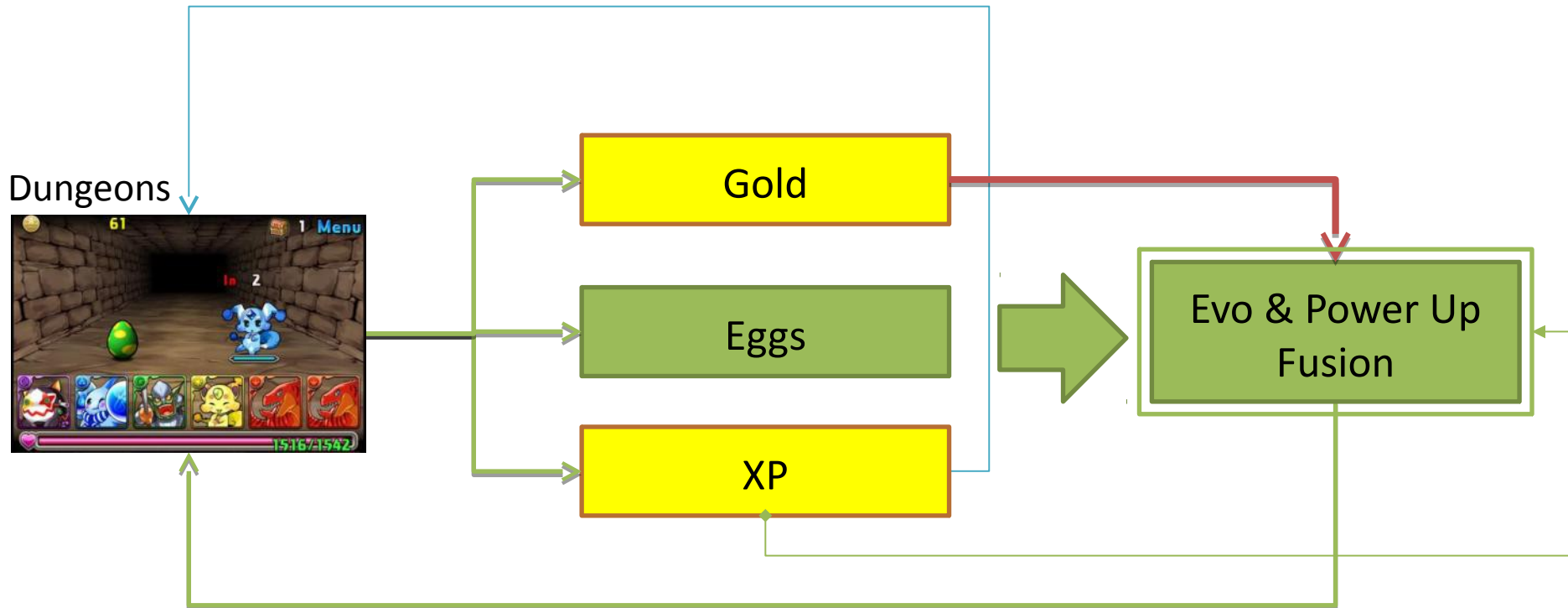


Egg Sources:



Gold sink!

Economy



Dungeon Grind costs Stamina
Stamina limits Dungeon Access Difficulty
Time & Level Up restore Stamina
Level Up increases Monster Power Limit on Teams

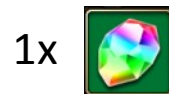
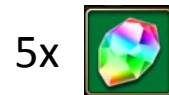


PaD Monetization

They don't even tell you




Humble \$?

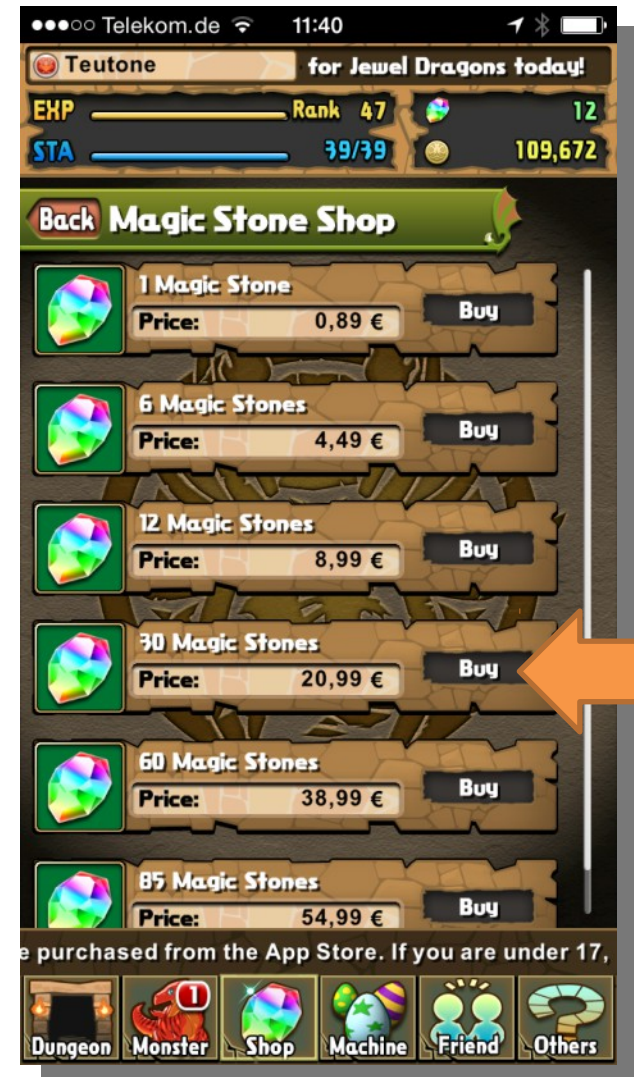
- Stamina refill
- Monster Fusion
 - Gold can't be bought!
- Eggs
 - Rare
 - Collectibles
 - Seasonal & Events
- 'Continue' on death
- Inventory Expansion



PaD does not directly sell Monsters or Gold

Pricing!

- Rare Monster Eggs cost 5 
 - That's \$5
 - Wtf?
- Continue costs 1 
 - That's \$0.99
 - Wtf?
- Inventory Expansion +5 costs 1 
 - Not too bad, no?
 - This gets expensive over time!
- PaD is very expensive!
- But can be countered by play time
- Check out their package scaling



Income

You earn Eggs by:

- ~~Daily login (1+)~~**
- Dungeon Completion (1)
- Mastery of Dungeons (5)
- Events (x)

Loyalty gets rewarded



KPI Calculations

4 million US\$ per day = 120 million per month

(yes that's 1.4b / year)

Assuming \$50 ARPPU (from jp research):

= 2.400.000 payers per month



1) Assuming 3% conversion: 80m players

2) Assuming 10% conversion: 24m players



What is more likely? Of course 24m players

-> 10% Conversion! (average iOS f2p have <3%)

Quote:

monster-collecting adventure, GungHo Online
Entertainment launched the mobile game in
2012, and it now claims over 20 million users -
- roughly 1/6 of the Japanese population --

PUZZLE & DRAGONS

Perfect Maintainability

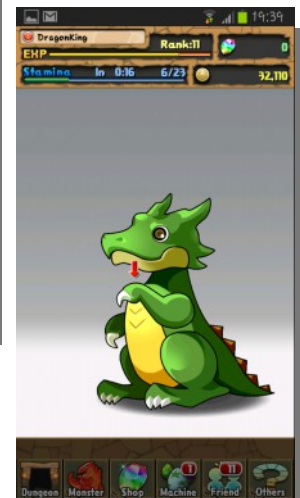
BUT THERE IS MORE – FAR



Social Functions

Adding Friends:

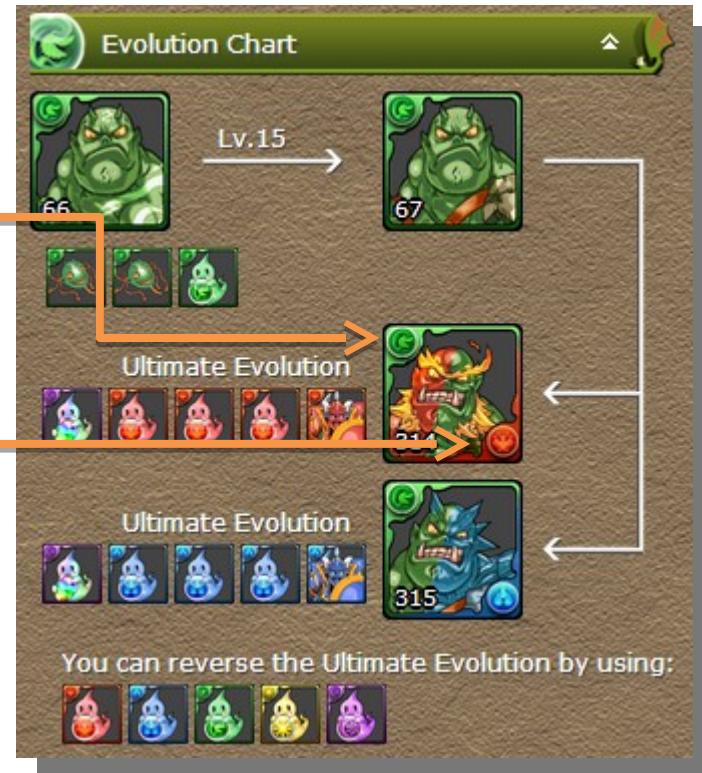
- Mandatory for dungeons
- Gives 10 pal pts per use
- Recharge over time
- Recommendations given
- For each 200 pal pts one draw on pal machine
- Friends gain you monsters!
- Friends make you stronger through Leadership skills!



Mastery: Evolution

Evolution Variants:

- Multi Colored Monsters
- Potential dual attack



PaD does not sell individual monsters!

Mastery: Power-Up Fusion

Awaken Skills:

- Advanced Power up
- Adds skills to monsters
- Need special Monsters to fuse

Example on the right:

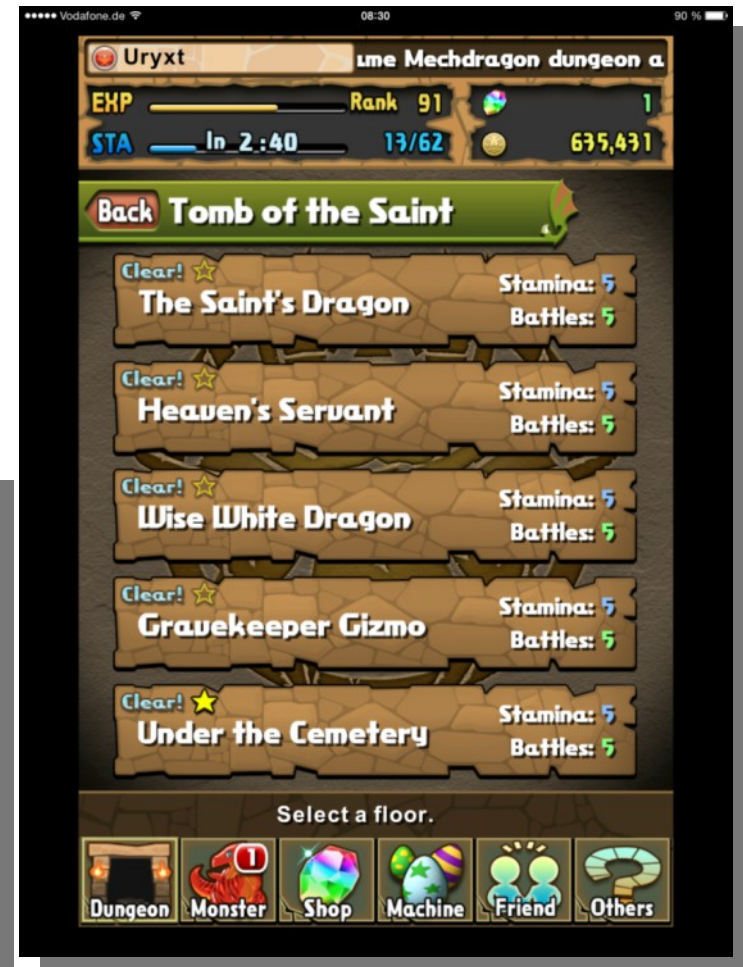
- Fire Dominion Uriel
- Dual colored
- Up to 4 Skills



Mastery: Dungeons

Dungeon Mastery:

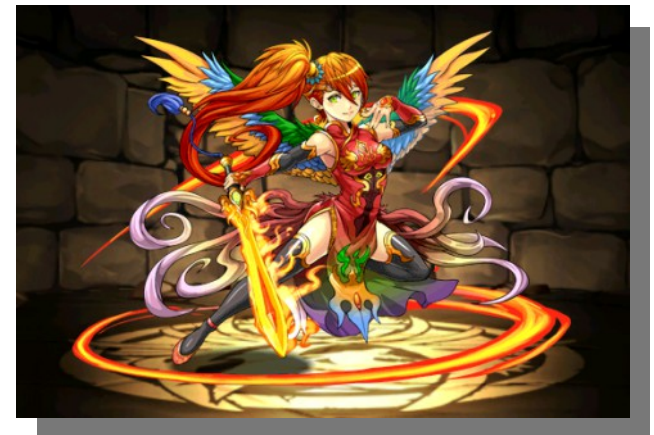
- Unlocks after finishing t-dungeon
- By using your friends as team!
- Gains Magic Stones!



Dungeon Bosses

Bosses:

- Are at end of dungeon
- Various tactics & abilities
- I.e. Can block colors
- Freeze party members
- Change color board
- Rarely also drop as loot!
- Boss as player character? Cool
- Some bosses require specialized teams!



Team Tactics

Edit:

- Player can create multiple teams
- Number of teams inc's by progress
- Special teams key to later tech & event dungeons
- Means number of Monsters increases
- Monster Box needs to be larger
- Sink increases over time
- Leadership & Monster skills vital to “match3” game optimization
 - Time to drag increase
 - Color modifications
 - Board modifications



Events

Machine Events:

- Gain rare monsters at Events
- Drop chance modifiers
- Dungeon appearances
- Rare Monster appearances



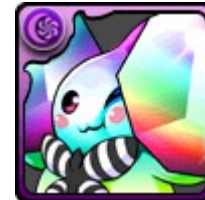
Events II

Weekly Events:

- Every weekday special dungeons
- Tuesday Dungeon: Evo Knights
- Wednesday Dungeon: Evo Mats
- Thursday Dungeon: Evo Mats
- Friday Dungeon: Enhance Mats
- Weekend Dungeons: Gold

Special Events

- Special Drop dungeons
- Holyday Dungeons



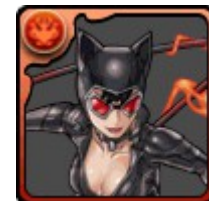
Events III

Marketing Events:

- Batman, Hello Kitty, Clash of Clans, Angry Birds Events
- Uses Monster Machines



PUZDRA	The Lightless Devils' Nest is live!	PUZDRA	The Light	PUZDRA	ass Devils' Nest is live!
EXP Rank 159 865	EXP Rank 159 865	EXP Rank 159 865	EXP Rank 159 865	EXP Rank 159 865	EXP Rank 159 865
STA In 4:32 57/96 10,002,062	STA In 5:02 57/96 10,002,062	STA In 5:09 57/96 10,002,062			
Back No.680 ***** BAO Batman+BW Attack	Back No.672 ***** BAO Catwoman+C. Claw	Back No.670 ***** BAO Joker + A. Blossom			
Balanced	Healer	Devil			
					
HP: 1199 Max Lu.99 Cost: 25 ATK: 518 RCU: 149	HP: 414 Max Lu.99 Cost: 20 ATK: 559 RCU: 308	HP: 1037 Max Lu.99 Cost: 20 ATK: 745 RCU: 0			
Skill: Batwing Lu 1 Turn(s): 15 2x Dark Att. ATK for 1 turn	Skill: Nine Lives Lu 1 Turn(s): 15 Mass Attack with randomized damage	Skill: Killing Joke Lu 1 Turn(s): 15 Activates a skill randomly			
Leader Skill: Supersonic 3.5 Dark Att. ATK when HP is 80% or higher	Leader Skill: Master Thief Coin drop rate slightly increases (Unable to switch to sub)	Leader Skill: Maniac Mastermind Inflict even more added damage when matching Orbs			



Dragon's Dogma Collab



EVANGELION Collab





PaD's expandability

Horizontal:

- Monster Variants (attribute design)
- Plus fusion concept
- Plus drop chances
- Dungeon Variations (Drop chances)



Vertical

- Dungeon Difficulty
- Team size Limit
- Evolution Concept (Tiering)

PaD can go on for years with this system

Why PaD is an ideal iPhone game

Online:

- Asynch, even semi offline
 - Note JP requirements due to commute
- Persistent Online player save
- Short and Medium game sessions
- Easy to learn hard to master

'Turn based'

- Can be played without time pressure
- Play can be interrupted anytime without side effects
- "Feels connected" due to friends being permanent part of game play



For Europe/USA



- PaD is too generic / grinder
- No initial goals
- Not enough explanations
- Grinders need more “soul & flesh” for EU/US
- Compare Pokemon vs. PaD



Q&A

eMail: teut986@gmail.com

Twitter: @teut

Blog: teut.blogspot.com

Also look for my other
dissecting talks about

- World of Tanks
- League of Legends
- King.com games

ASSASSIN'S CREED® IDENTITY



Coming soon on iOS, Android

Appendix

Financial News

http://en.wikipedia.org/wiki/Puzzle_%26_Dragons

<http://www.hotstocked.com/article/76152/gungho-s-hit-puzzle-amp-dragons-makes-775.html>

The Japanese corporation posted \$1.5 billion in 2013 revenues, with their hit game Puzzle & Dragons generating the largest portion of that sum, and \$755 million in revenues through the Google Inc (NASDAQ:GOOG, GOOG message board) Android store alone ...

... pulled another \$650 million on the Apple Inc.

This (EU) expansion obviously yielded results as the company claims that the game churned another \$155 million in January 2014 alone.

This would peg the daily revenue generation of the monster-collecting, gem-matching little wonder at roughly \$5 millions per day

<http://n4g.com/news/1448628/puzzle-and-dragons-ip-grossed-almost-1-5-billion-in-sales-over-90-of-gungho-sales-for-2013>

GungHo released their fiscal year earnings today and their Puzzle & Dragon IP has managed to gross ¥148.584 billion in sales (\$1.46 billion) in 2013. (3DS, iPad, iPhone, Puzzle & Dragons, Puzzle & Dragons Z)

<http://www.bloomberg.com/news/2014-04-16/gungho-s-six-mobile-device-titles-profitable-as-new-games-sought.html>