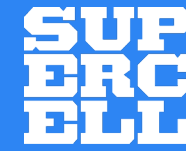


**SUP
ERC
ELL**




Learnings from the removal of Loot Boxes



Brawl Stars, to the moon!

Supercell duo **Clash of Clans** and **Brawl Stars** are both up month-on-month, though the latter game is showing the much more dramatic growth. **Brawl Stars** has been rising since November 2023, when it earned ~\$11m, to hit \$31.3m last month. It's quite a comeback – February 2024 was one of its top earning months ever, and has brought the game back the level it was at during its peak in 2020 and 2021.

During an earnings call, CEO **Ilkka Paananen** also revealed that it achieved over 220 million monthly players across its portfolio. He highlighted that its live games segment rose every quarter over the financial period due to the success of Brawl Stars, which tripled its player base since last summer and has become the developer's biggest title by amassing \$2 billion in revenue last September.

 Pocket Gamer.biz

What's going on with Brawl Stars? Supercell's 2018 game is having a major payday

Brawl Stars to the Moon? A monetization deep gamers crossover



two & a half gamers
6.91K subscribers

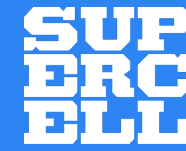
Subscribe

30



Share





Brawl Stars is a fast-paced 3v3 multiplayer and battle royale made for mobile.

People
50+

Nationalities
23



About the Speakers



Frank Keienburg

General Manager, Brawl Stars
Ex-Blizzard Entertainment (Europe)



Frank Yan

Game Designer (Systems)
Ex-Blizzard Entertainment (Hearthstone)



Hello!



Before

During

After

Brawl Stars \neq Your Game

How did boxes work?

Primary way to unlock **Horizontal** (Brawlers) and **Vertical** (Power) progression.

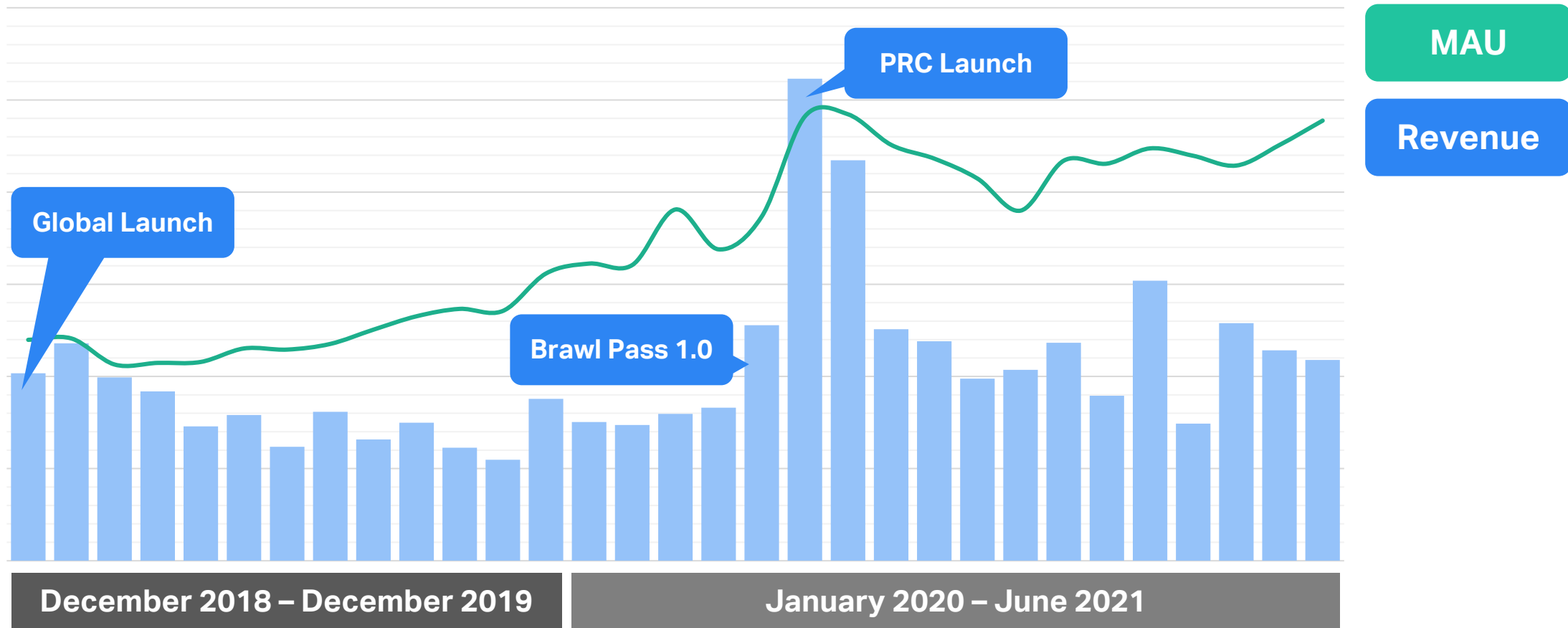
Second most important SKU in Brawl Stars





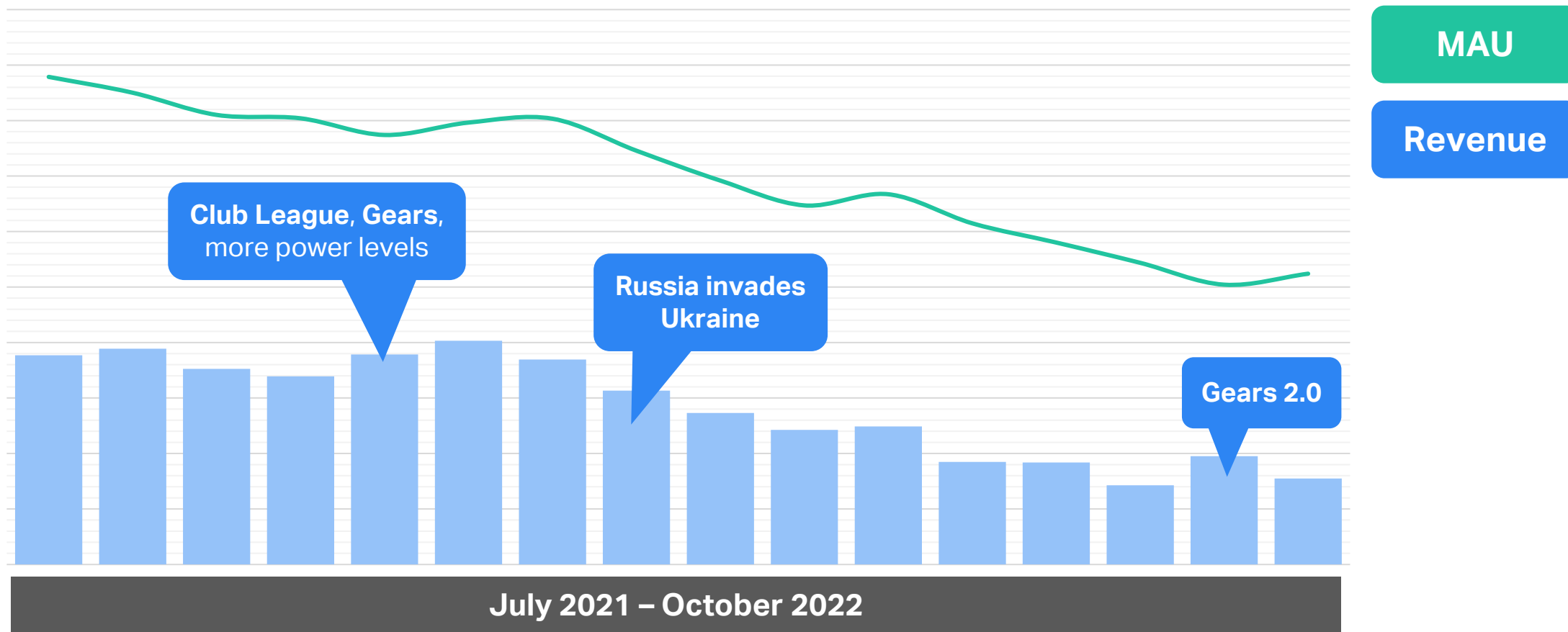
Brawl Stars: The Early Days

Initially, things were great...





... until they weren't!



We needed a **change...**

How do we get players **excited** to
come back to Brawl Stars?



NEW BRAWLER!

SPIKE

DAMAGE DEALER

1/10 **Legendary Brawlers**



Most people think Spike is Colt and Shelly's cute sidekick at the Ranger Ranch. Nobody could begin to guess the depths of his trauma

Legendaries = most exciting!

The **Free 2 Play** experience:

Average of **0.9** Legendaries 365d after install

Most engaged needed 10 months to unlock one



We believed that the best solution would be
to **remove** loot boxes from the game!

Why did we believe so?

I

Willingness to take **bigger risks!**

II

More **choice** and **clear** goals around Brawler Unlocks

III

Scrutiny around Loot Boxes in media

IV

Newsworthy moment and clear messaging

V

Learnings for Supercell

Naively, we decided to remove **all random rewards** from the game.

Before

During

After

The Replacement System: **Key Goals**

Key Goals for the Re-Design

I

Clear goals and expectations for Brawler Unlocks

II

Monetization hook

III

Easy to understand and part of the game's core loop

STARR ROAD

8800

EPIC
925



Choices available:

MYTHIC
1900



Choices available:

LEGENDARY
1900
~~2800~~

50% OFF



Choices available:

RARE
160



Choices available:



The Starr Road

- All Brawlers unlocked in **succession**
- Order is **pre-determined**
- **Rarities** with different currency price points
- New **earnable/purchasable** currency (**Credits**)
- **No RNG**

We had **over 60 Brawlers** in the game, how much **choice** do we give you?

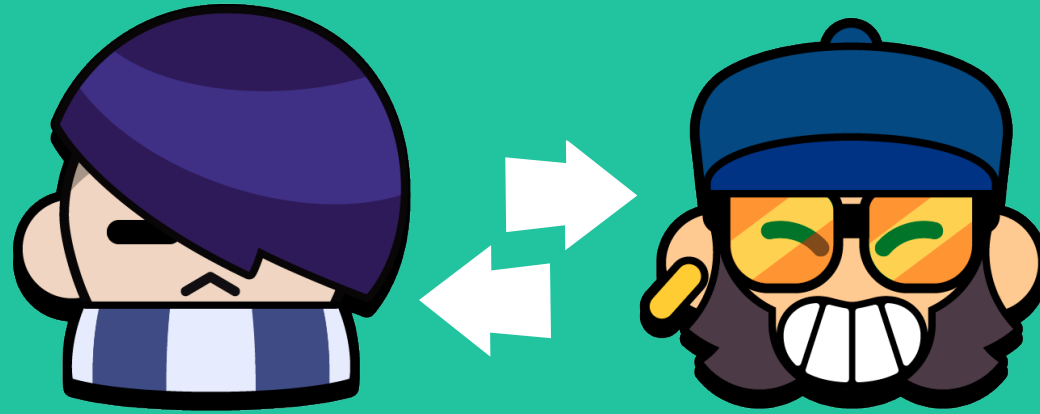
We wrestled with this question for weeks



The design got complicated fast

- Choice of rarity of Brawler to unlock?
- How many choices?
- What about new Brawlers added to the game?





Decision

Allow players to freely switch between a few preset Brawlers until fully unlocked.

STARR ROAD

8663



CURRENTLY UNLOCKING
JACKY

TANK

SUPER RARE

Collect Credits to unlock this Brawler:



0/430

UNLOCK NOW:

79

NEXT TO UNLOCK

RARE

160



BROCK



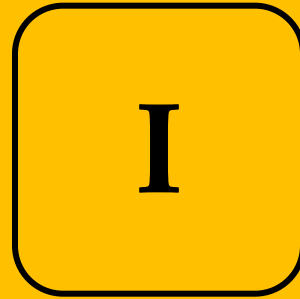
Summary: The Starr Road

+ Pros

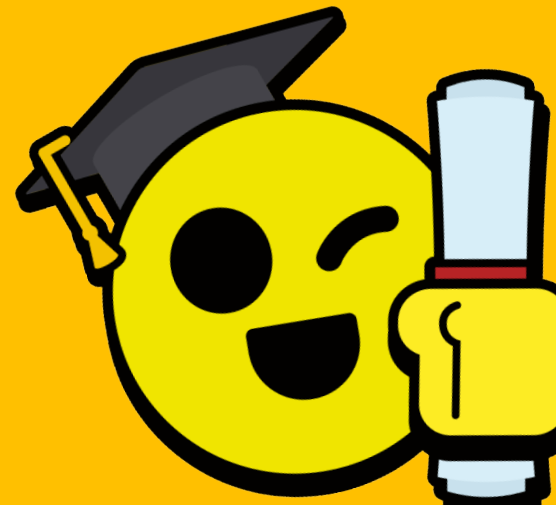
1. **Predictable unlocks**
2. Monetization/top-ups
3. Same experience for everyone

- Cons

1. **Not as exciting to unlock Brawlers**
2. Less experimentation
3. Favorite Brawler might be far away



When wrestling with a design, **simplify.**



Time to ship the **Starr Road**!



December 2022 #OMEGABOX

Views
17m



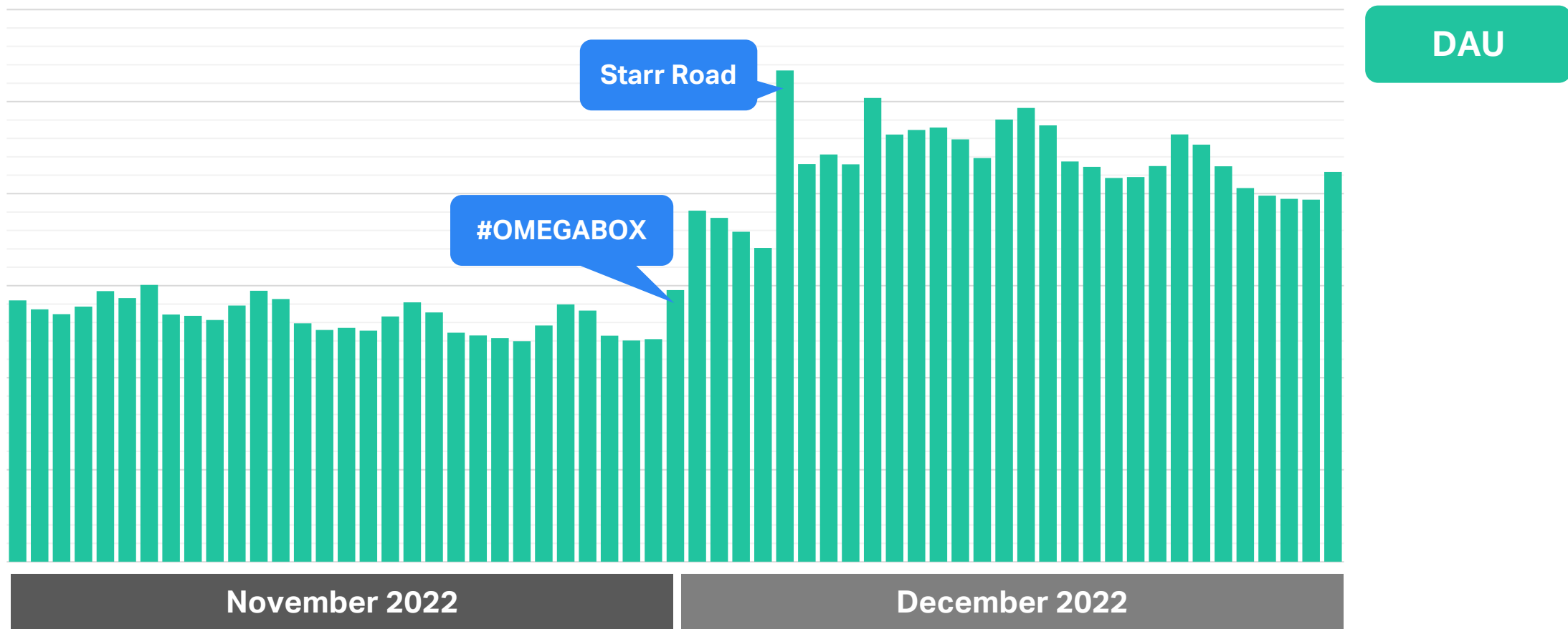
We had a **lot** going on!

- **#OMEGABOX** community event
- **Seasonal holiday freebies** (December 12-26)
- **Free Brawler** (Gray)
- **New Legendary** (Chester)
- **Seasonality** (Christmas)





Initial results: Promising!

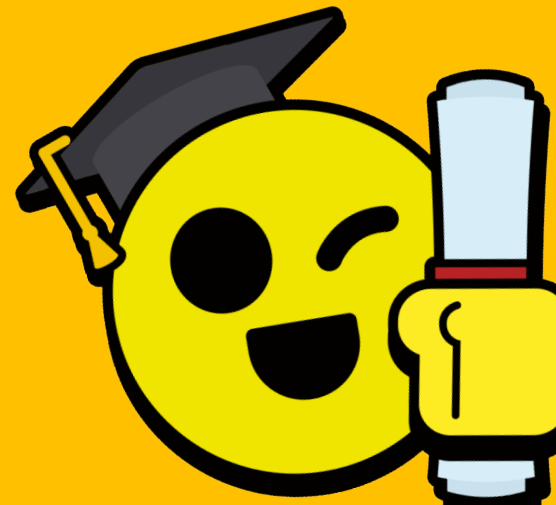


However: It was **extremely** hard to get a clear read on what was going on!





Reduce **noise** around big changes



Before

During

After



MORTIS



February 2023: Masteries



5800



10300



16800



24800





CATALOG



MORTIS

4 / 22 Collected



April 2023: Bling + Catalog



THEMES



BROWN
& FRIENDS



D



MORTIS



BEACH TIME
MORTIS



DARK MECHA
MORTIS



LIGHT MECHA
MORTIS



MECHA MORTIS



NIGHT WITCH
MORTIS



ROCKABILLY
MORTIS



ROGUE MORTIS



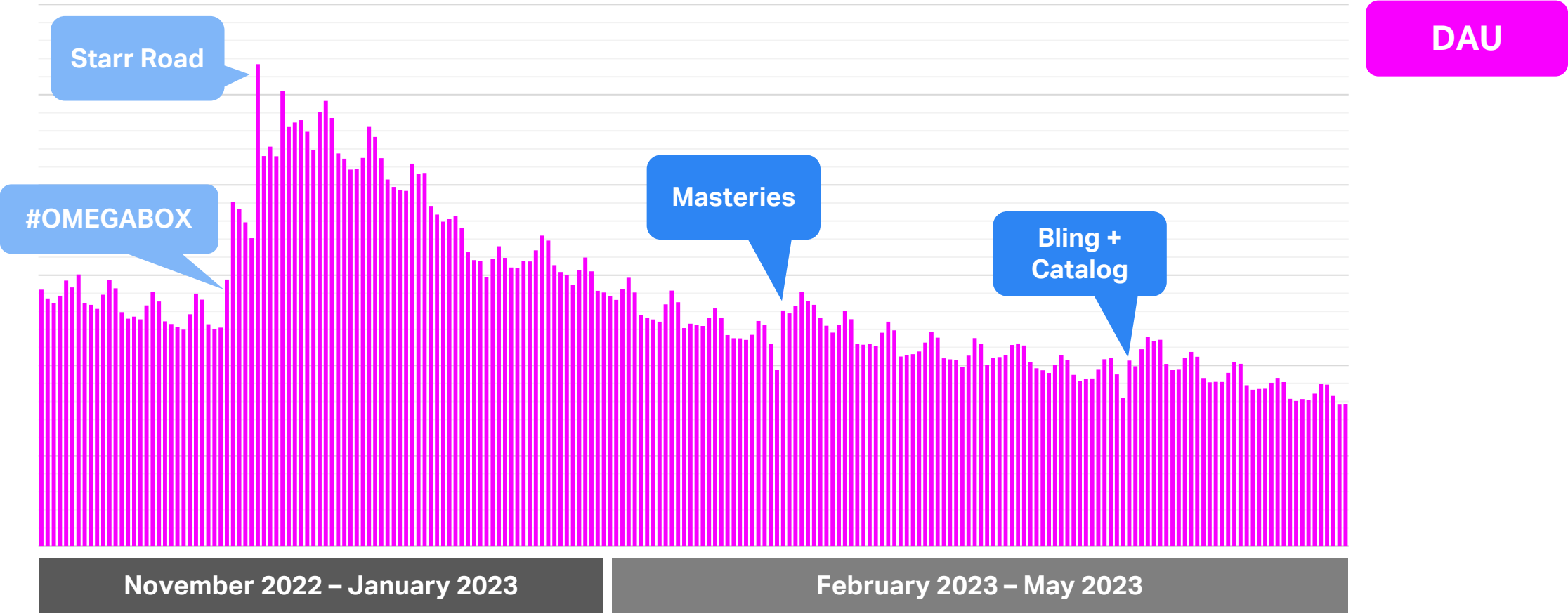
TOP HAT MORTIS



Both features were **embraced** by our most engaged players, but the decline continued...



DAU decline



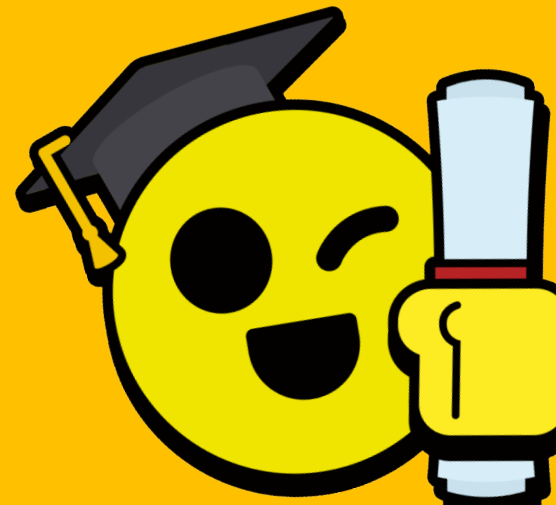


D30 decline



III

Big changes are **not** a silver bullet.



The **Starr Road** didn't succeed in
recovering the game



We **did not** understand
what our players wanted.

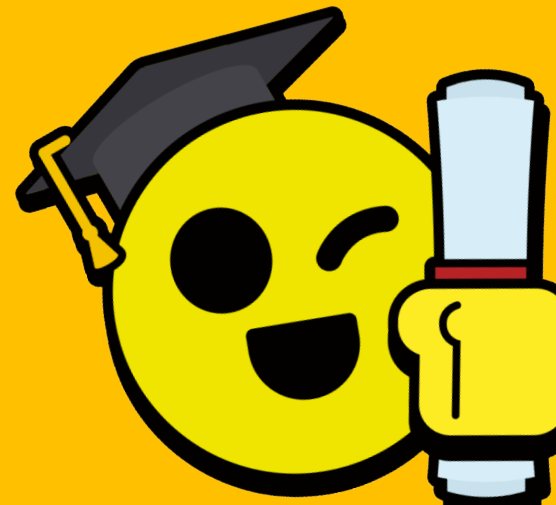


We were in an echo chamber
and **didn't** realize it.



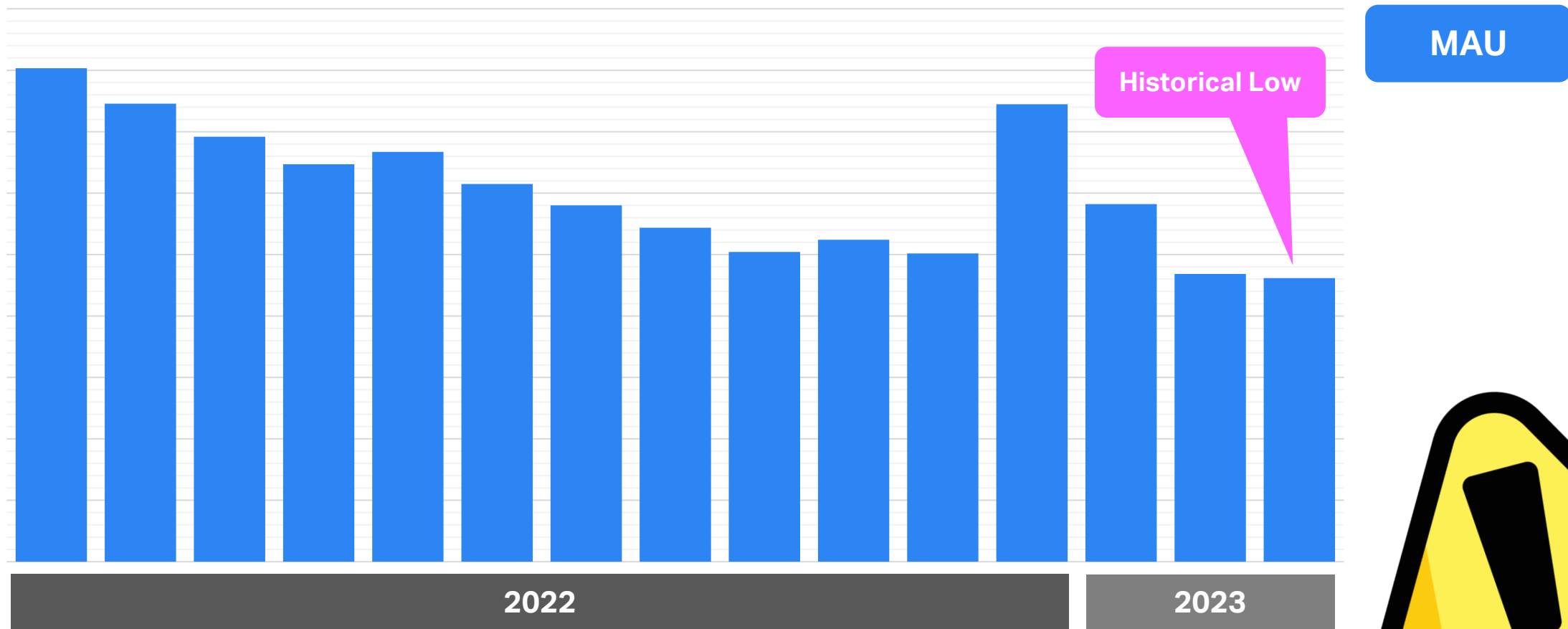
IV

Find people who **challenge you**, especially on big changes.





Lowest MAU... ever!



Despite that team morale was **strong**, and we felt empowered to turn Brawl around.



As a team, we started to reflect
on **why** we didn't recover!





**SUP
ERC
ELL**

★☆☆☆☆ December 28, 2023

★☆☆☆☆ December 28, 2023
Bring back Mega boxes. The game isn't even fun now that the only way to progress is to grind or pay to win. I want luck based gameplay back.



@saanvisingh2542 1 year ago

You can never replace the excitement of opening a box and hoping you get a new brawler 🤖



 2.2K



Reply



@HamzinaGalina 2 weeks ago

supercell going to do their worst change in the game



@AandEeditss 2 weeks ago

Some day I hope they come back



@maryvi1 1 year ago

мы так любили мегаящики...

перед каждым открытием волнуешься, а сейчас не будет такого 😞



👍 5.8K



Reply

▲ 223 replies



Reddit

https://www.reddit.com › Brawlstars › comments › who...
o thinks that should be

Who thinks that should bring back the small, big and mega ...



@Kerem11804 1 month ago

I miss the Megaboxen



@TrollFaces777 2 months ago
Brawl stars with

Brawl stars without chests is not fun, please return them: Like so he can see



212



Reply

▼ 7 replies



2023 Plans -> Trash

We had to infuse rewards once again with **excitement!**



In June 2023 we added **random** engagement rewards back to the game!

Starr Drop Design

Building anticipation

1. Will the Starr Drop upgrade?
2. What will drop?

High heights for the best rewards!

Other

- Now includes **cosmetic** items!
- **Complimentary to Starr Road**





Simple: 8 Wins = 3 Starr Drops

FRIENDS

TEAM

CLUB

New Event in: 5h 16m



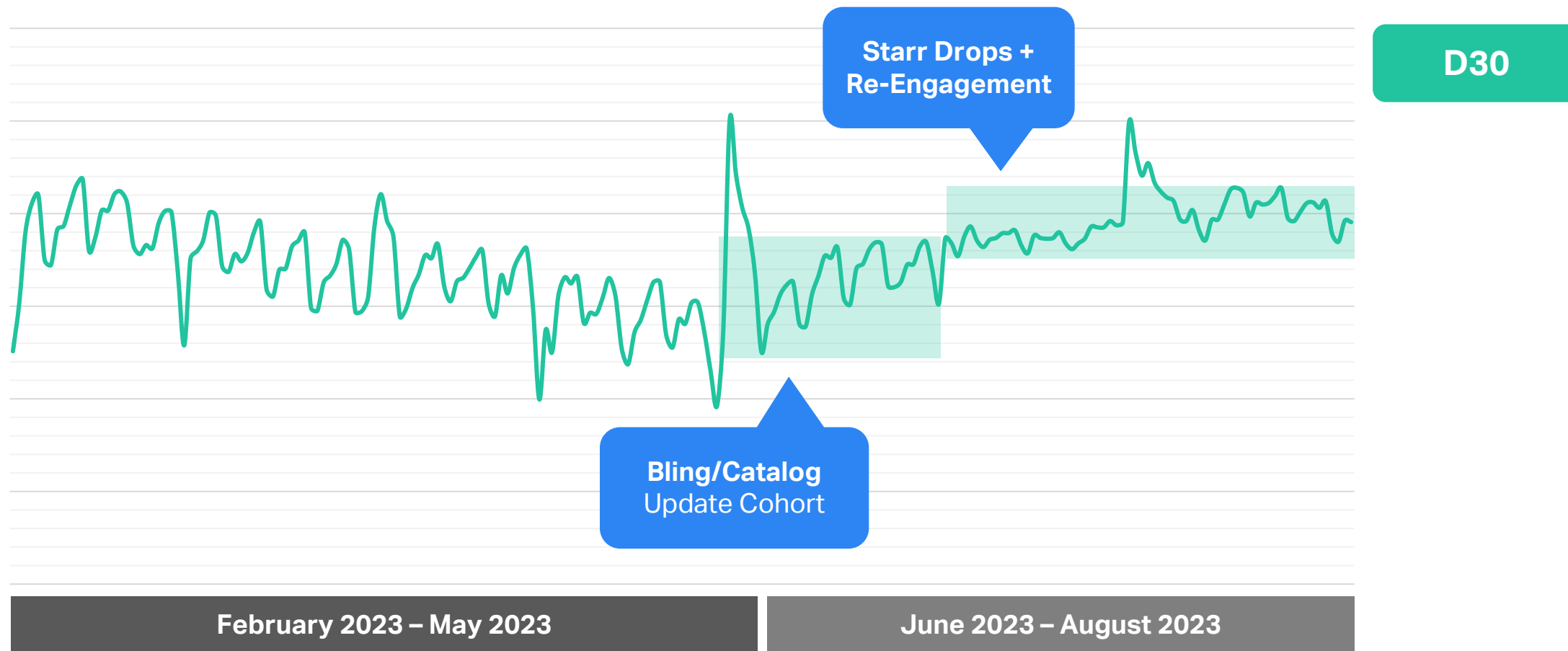
BRAWL BALL
Galaxy Arena

PLAY

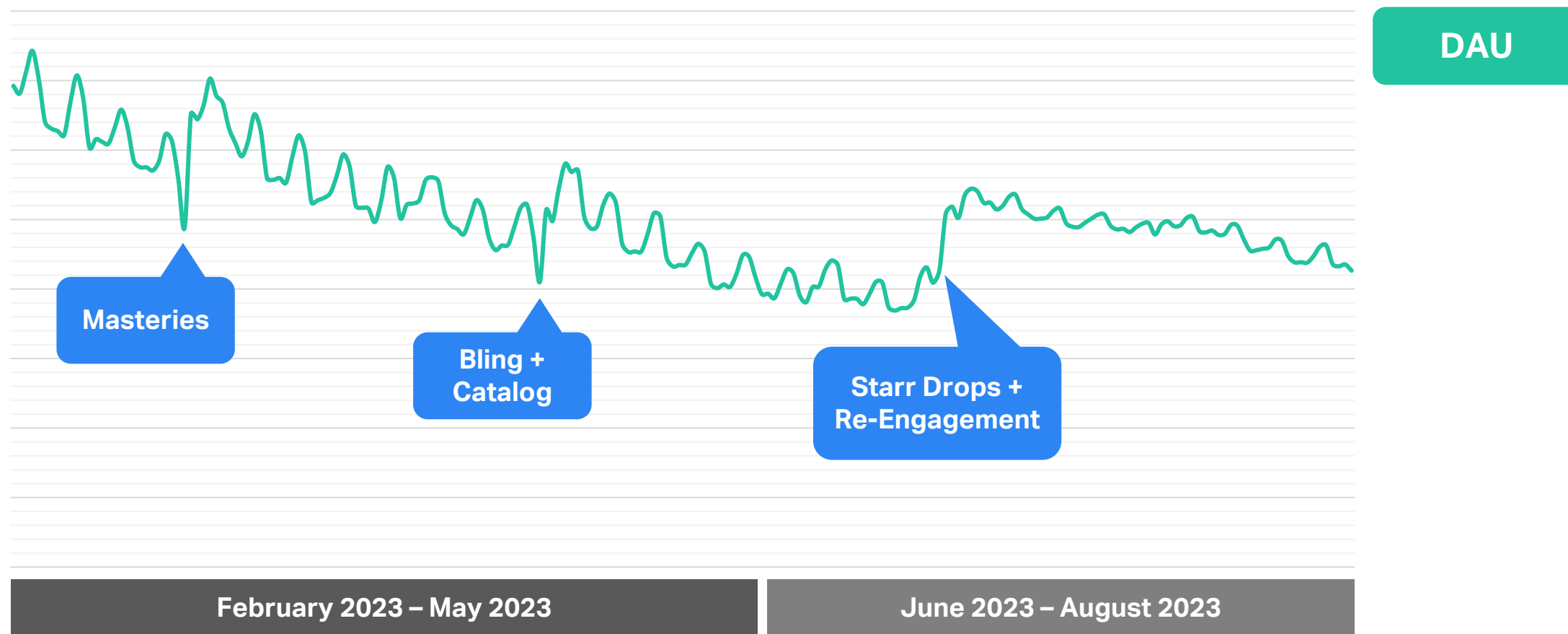
Initial results?



D30 Retention improvements!

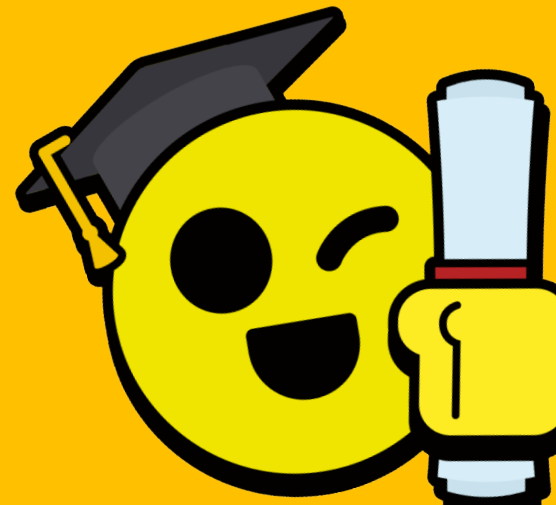


DAU increased as a result





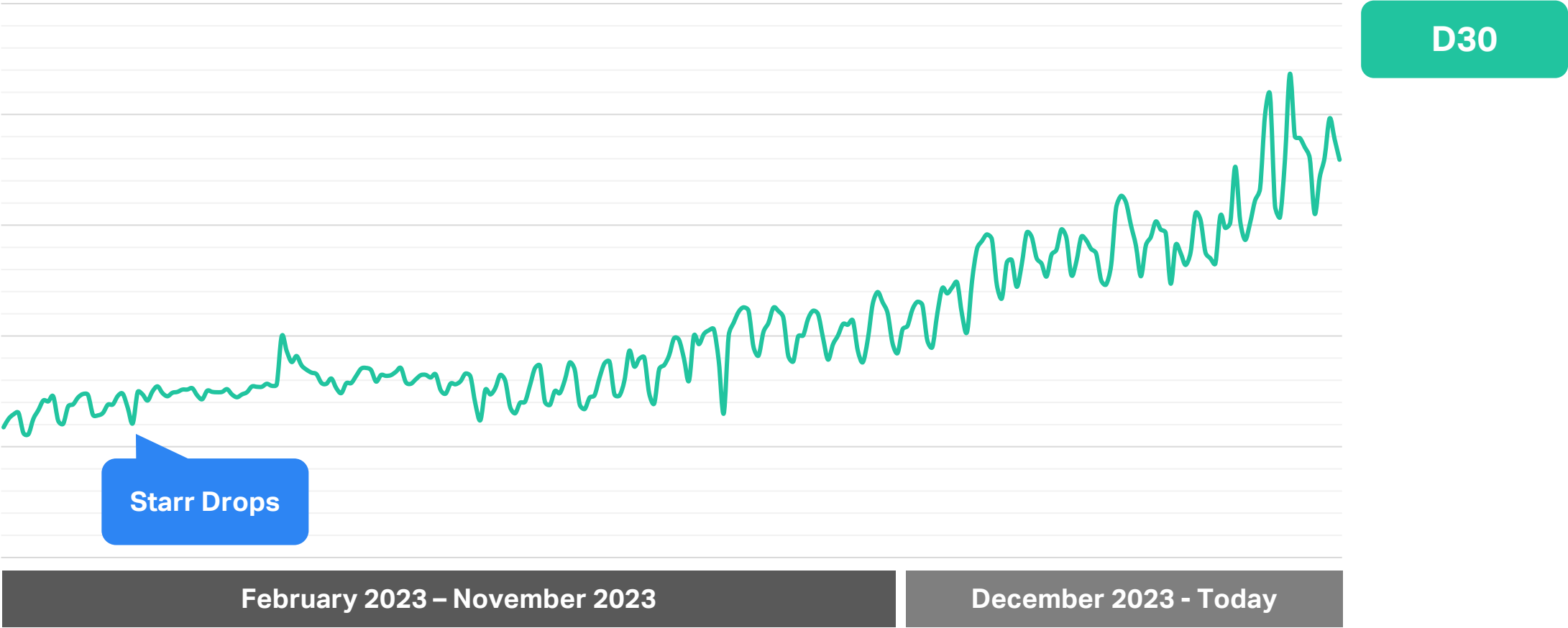
Random rewards are **exciting**
for our players! Doh!





Were we able to recover?

D30 Retention





September: Hypercharges



An illustration inspired by the game Clash Royale, featuring several characters in a dynamic, action-oriented pose. In the center, a Barbarian with a yellow beard and purple headband is shouting, holding a large sword. To his right, a Giant is shown in a similar pose, holding a glowing orb. To the left, a Princess is visible, and in the background, a skeleton is running. The scene is set against a backdrop of purple and blue energy, with a large, glowing orb in the upper right corner. The overall style is vibrant and cartoonish, typical of the Clash Royale aesthetic.

Inspired by **Clash Royale**

More gameplay depth

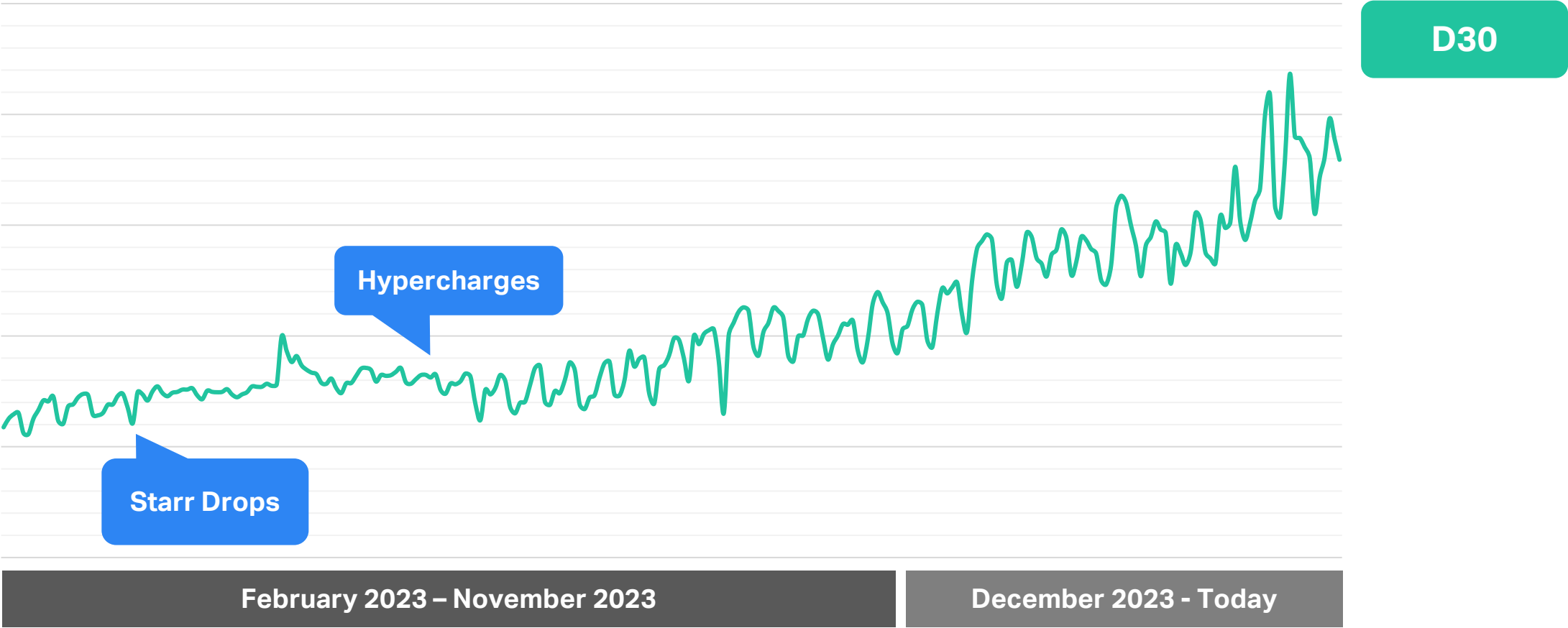
- Unlocks at Power 11 (max level)
- Hero moment every match







D30 Retention





#ShootingStarrDrops



MEGA PIG!

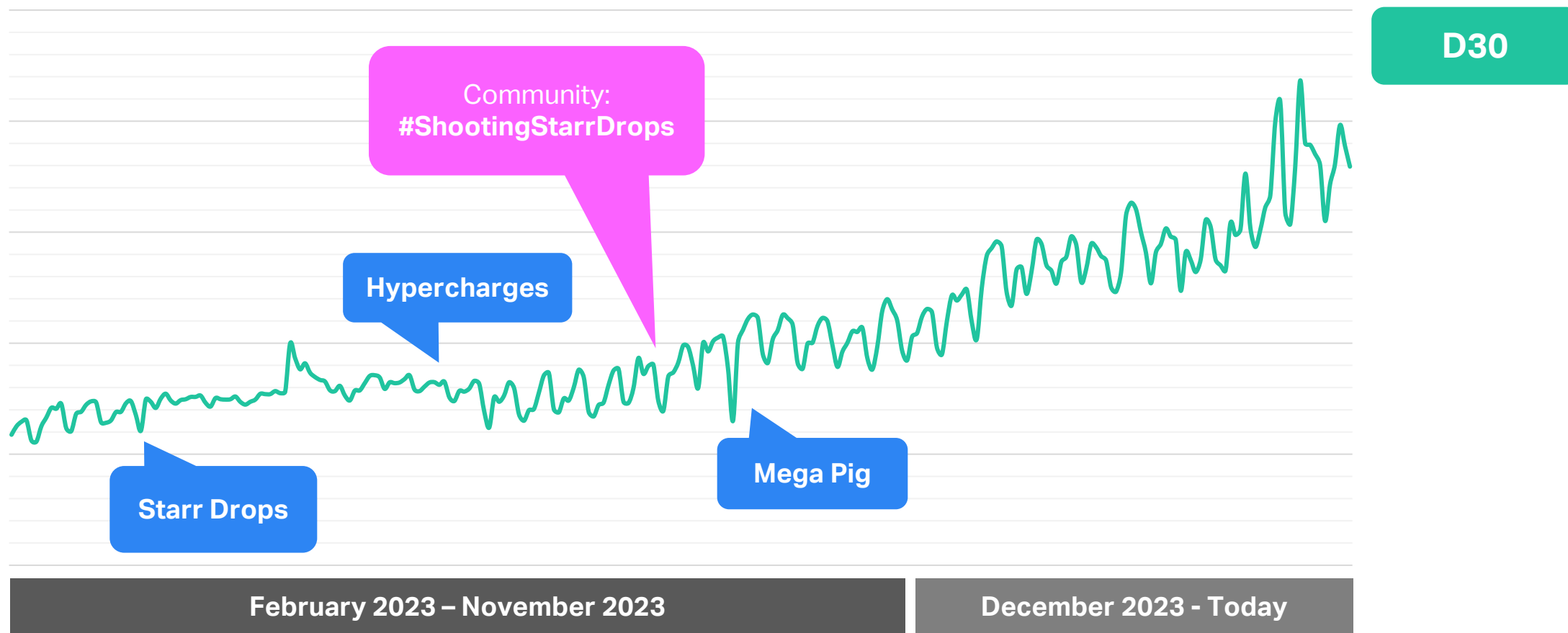


Club League vs. Mega Pig!

Club League + Quests	Mega Pig
Ongoing (3 days/week fixed + Quest week)	Monthly (3 days)
24-36 matches/month	15 matches/month
Regular + Competitive (Bo3, pick-ban)	Simplified Competitive (Bo1, pick only) + Mods
Club Coins (+Club Shop)	Starr Drops
League Ranks	No ranks



D30 Retention





Brawl Pass 2.0



Brawl Pass: Unshackled!

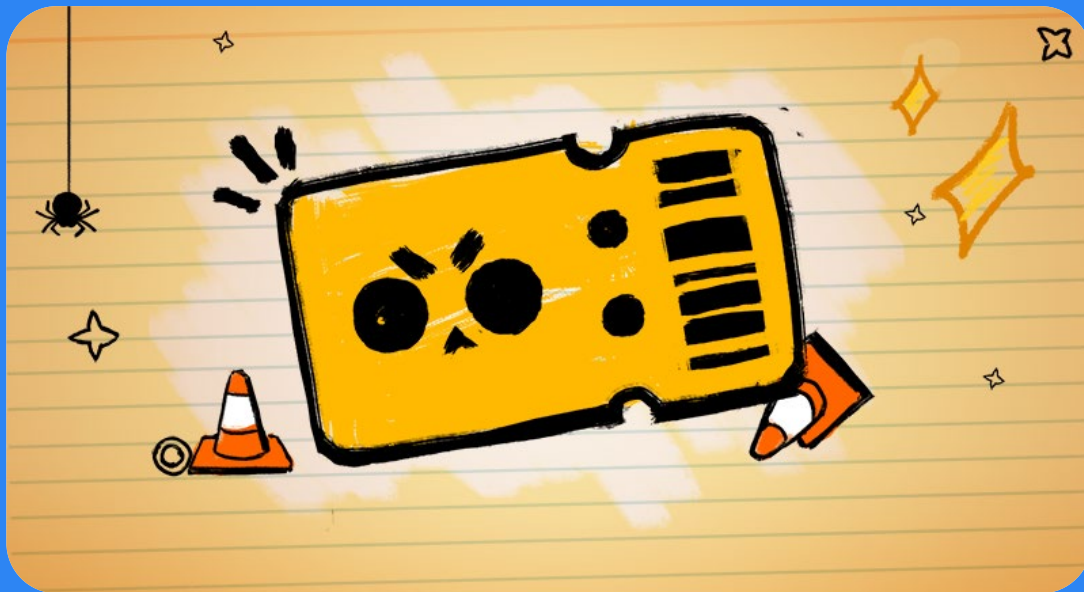
Brawl Pass 1.0	Brawl Pass 2.0
Bi-monthly (7-9 weeks)	Monthly (4-5 weeks)
169 Gems (USD 9.99)*	IAP only (USD 6.99/9.99)
Exclusive Brawler	No exclusive Brawler
90 Gems (F2P)	50 (F2P) + 100 (Paid) Gems
13X	17X (20X for BP+)

How would the **community** respond if the Brawl Pass was only available as **IAP**?



Community x Design

- We **communicated** early! (Nov 5)
- We **buffed** the free progression track
- We were **extremely transparent** who would get what





WIPEOUT

Frosty tracks



BRAWL BALL

Freezing ripples



GEM GRAB

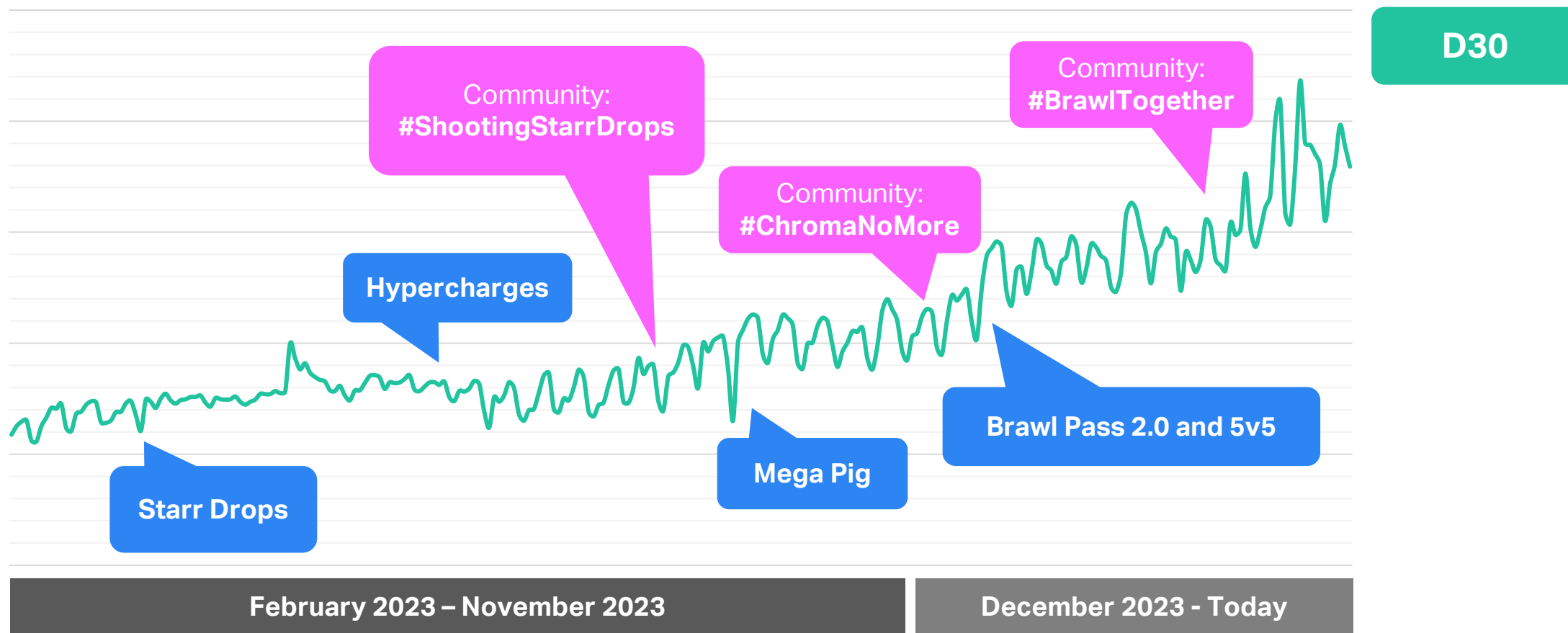
Arctic extraction

5v5





D30 Retention

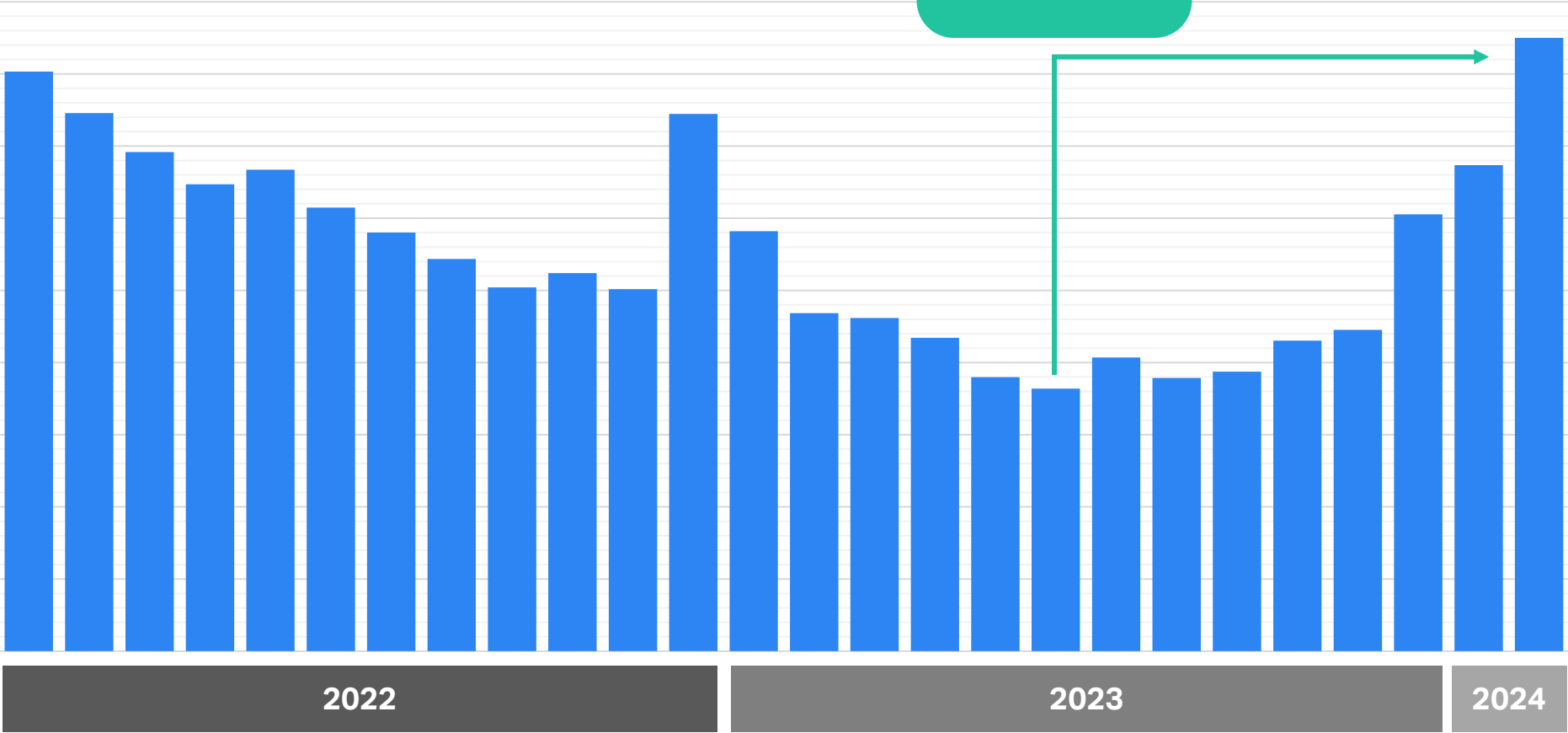


Starr Drops added to core areas!





MAU

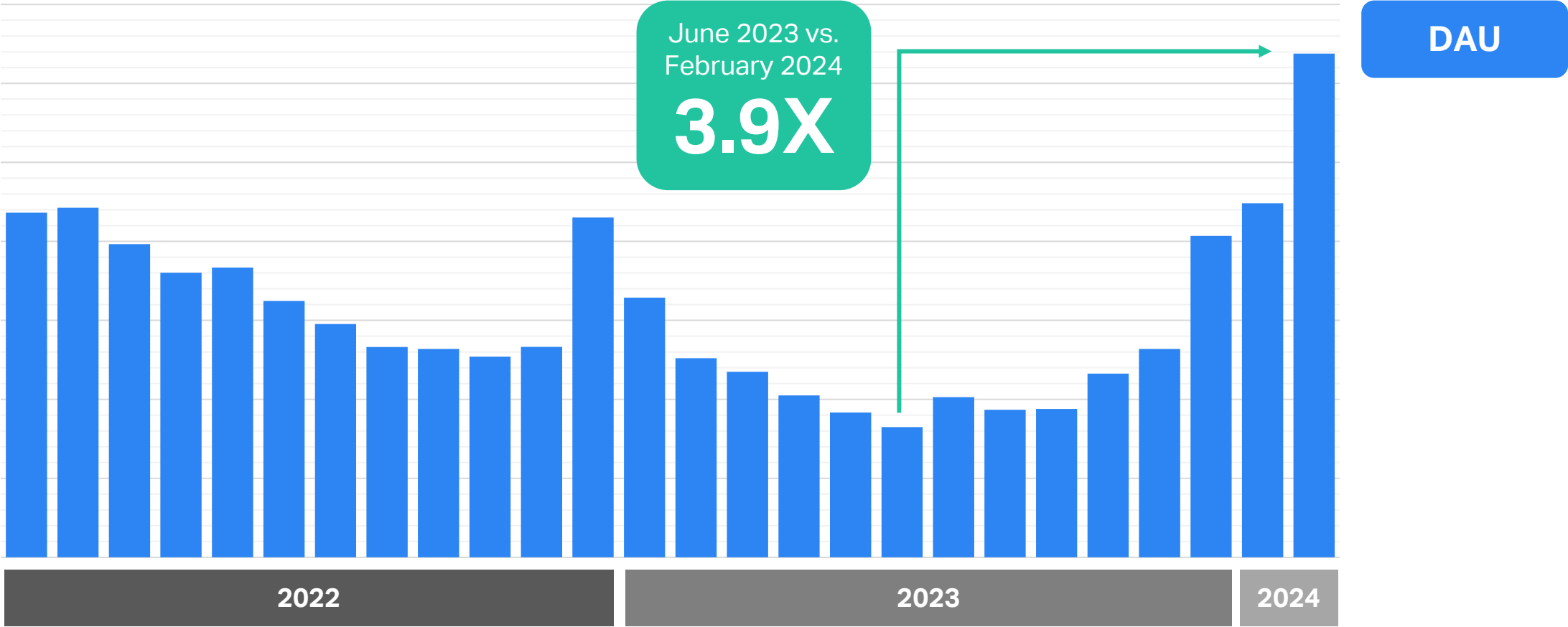


June 2023 vs.
February 2024
2.4X

MAU



DAU (Monthly Average)

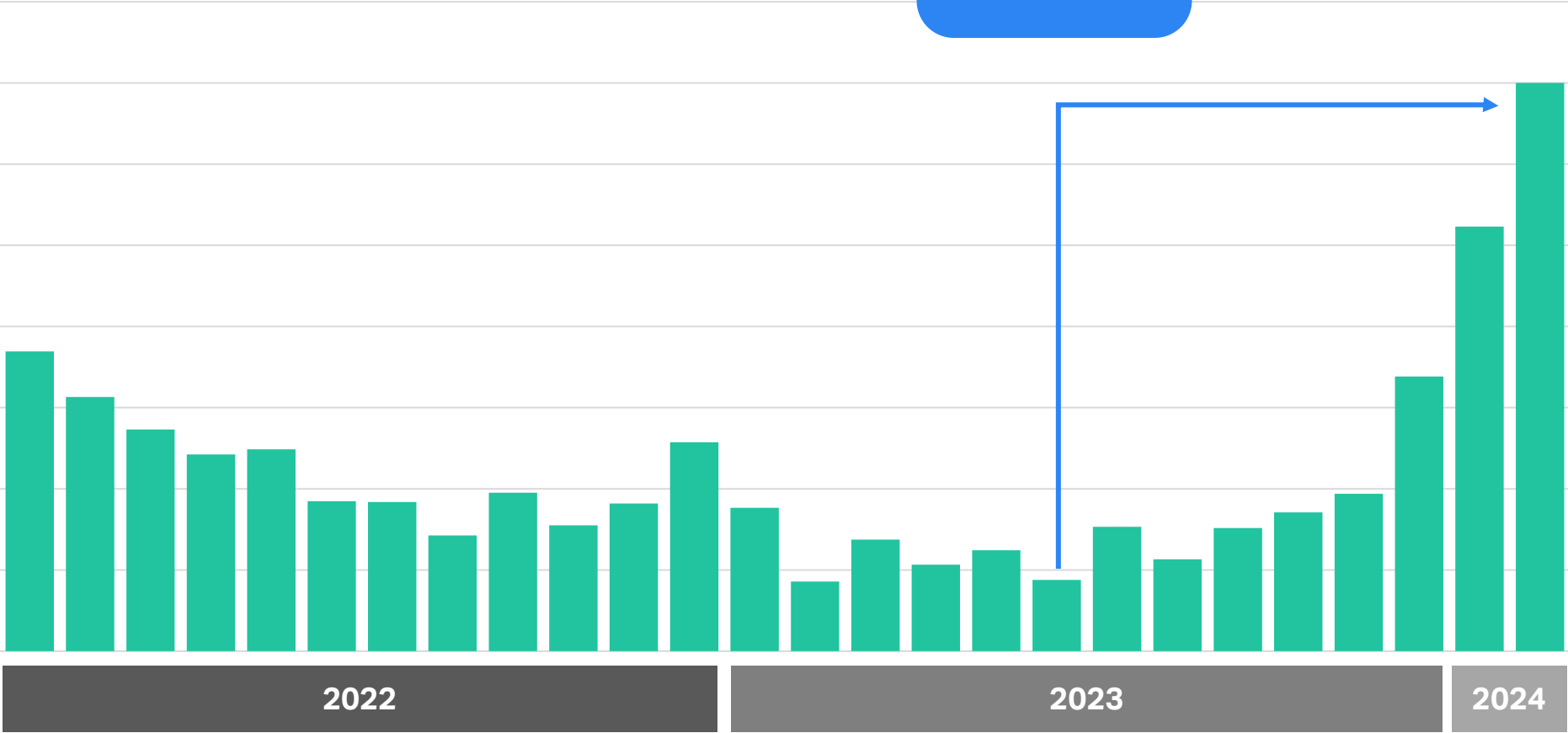




Revenue

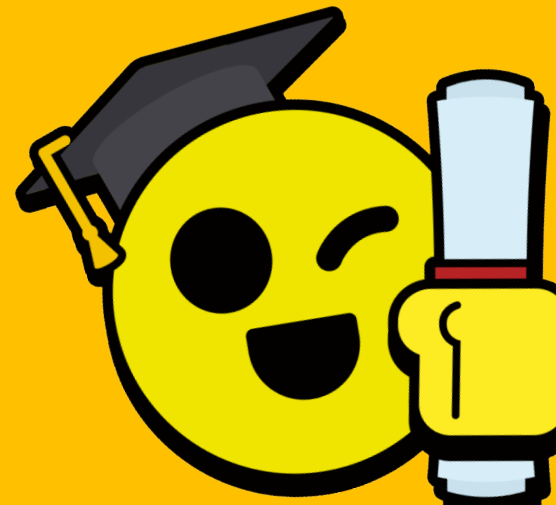
June 2023 vs.
February 2024
8.8X

Revenue





See retention-based momentum?
Double down!

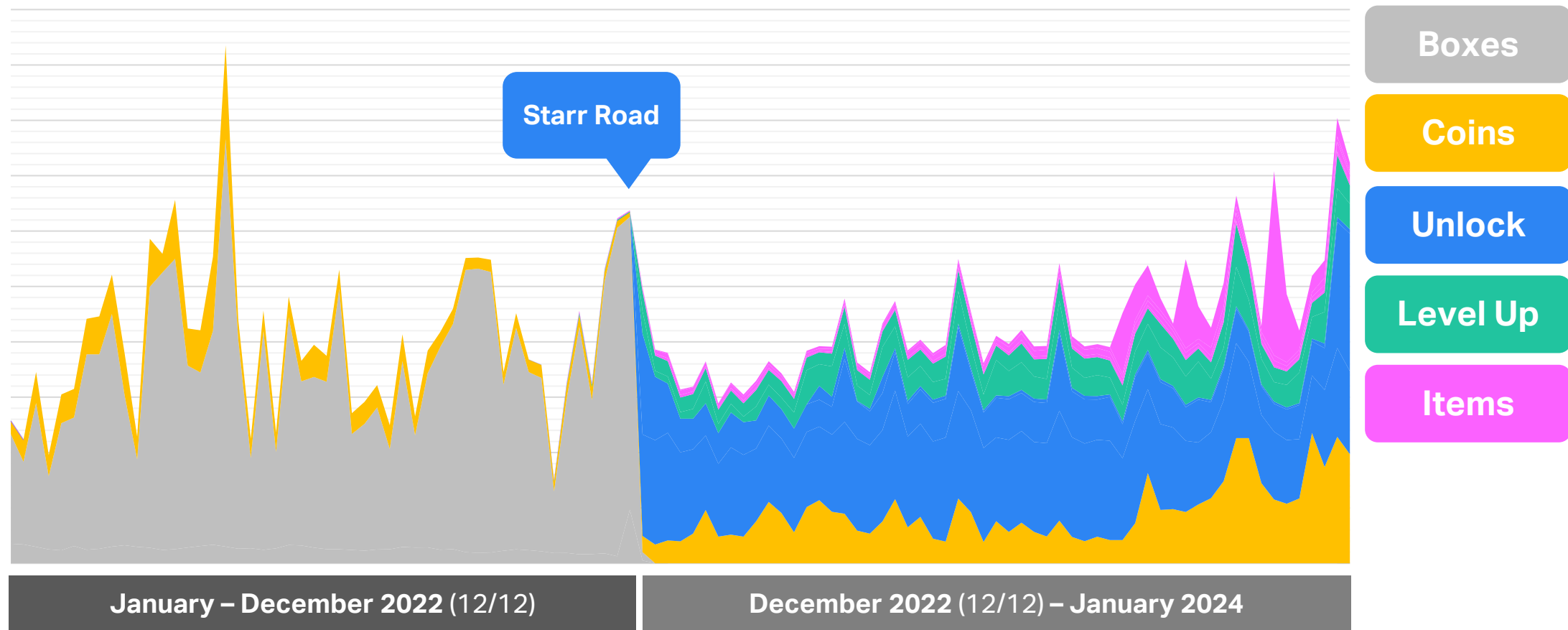


Removing Loot Boxes: Monetization Impact

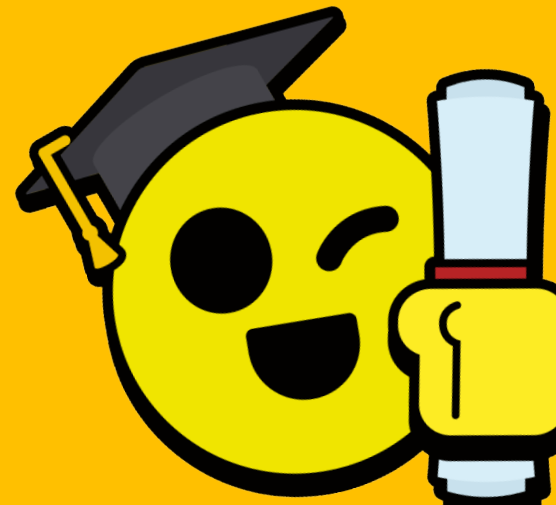




Paid Gems per DAU (weekly)



Recap



Key Learnings

- I. When wrestling with a design, **simplify!**
- II. Reduce **noise** around big changes
- III. Big changes are **not** a Silver Bullet!
- IV. Find people who **challenge you**, especially on big changes!
- V. Random rewards are **exciting!** Doh!
- VI. See retention-based momentum? **Double down!**

We're hiring!

