

MARKETING & MONETIZATION FOR MOBILE INDIES: NEW DATA FROM THE TRENCHES

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GDC NEXT 2014

A BUNCH OF INDIES UNDER ONE ROOF



SOME STUFF WE'LL TALK ABOUT

- Analyzing the market before full production
- **Where to soft launch/test your game**
- How to efficiently spend your testing budget
- The impact/non-impact of featuring
- Marketing your next projects
- How to cheaply and effectively test your icon

FIRST THINGS FIRST: DECIDING WHAT GAME TO BUILD

- Look for a “Goldilocks” pie slice
- Find successful games like yours in some way
- More important (and harder): find failures like yours



SUCCESSSES to learn from

	Similarities	Differences	Praised for	Top Grossing Rank
Blood Brothers (RPG) Free	Killer battles, mysterious characters, secrets to be discovered	Board game aesthetic, action combat, fantasy	Character collection, leveling, similar to but different from CCGs	59 Overall 9 Role-playing
Dungeon Hunter 4 Free	Hordes of enemies to fight, endless loot to plunder	Action game, fantasy	Best dungeon crawler, immersive experience	40 Overall 9 Role-playing
Rogue Planet \$4.99	"Unique turn-based strategy game set in a futurist world"	Multiplayer is important	Breathtaking story mode, endless fun	64 Overall 3 Strategy

FAILURES to learn from

	Similarities	Differences	Assumed Reason for Failure	Top Grossing Rank
Deep Dungeons of Doom Free	Meet monsters, fight treasures, challenging, "rogue-like"	Action combat, 2d side-scroll, fantasy	Unclear screenshots, difficult action combat, GPS permissions	998 Overall 149 Role-playing
Legends of Yore \$1.99 (w/demo)	"A casual rogue-like designed for mobile"	Pixel 2d, meta-game hidden, fantasy	Premium with demo, no IAP, unclear/pixel screenshots	n/a Overall* 150 Role-playing *(separate demo)
Rogue Touch \$2.99	Extremely Rogue-like	Pixel 2d, no meta-game, fantasy	Premium, unclear/pixel screenshots	581 Overall 60 Role-playing

SAMPLE ANALYSIS



Kitfox Games

SHATTERED PLANET



GAME OF WAR by MACHINE ZONE (iOS – FREE)

Grossing	Similarities	Differences	Praised For	Blamed For
iOS US				
Overall #18				
Games #12				
Strategy #1				
RPG #2				

Builder game, can only do one action at a time (one worker), troops can be used as defense, similar overall flow, game is in 2D, pretty hardcore, more mature visual style.

Predefined spots for placing buildings, super complex micro systems, global positioning of players on a map, Stronghold is not the only building that dictates progression and unlocks.

Ability to chat with players no matter the language (ultra powerful translation system that makes many jealous!), sophisticated means of social communication, original Hospital mechanic, cool speed up mechanic through the help of allies.

Clash of Kings



TOTAL CONQUEST by GAMELOFT (iOS / Android – FREE)

Grossing	Similarities	Differences	Praised For	Blamed For
iOS US				
Overall #165				
Games #150				
Action #34				
Strategy #30				

Combat strategy, bunker mechanic where troops are stored (militia), gate system on the walls, use of catapults, overall flow.

Can build anywhere, no placing tile system, no castle feeling, toony graphical style, not possible to carry troops placed in bunker to the fight, full 3D.

Pretty graphics, impressive sounds, original bunker mechanics, full 3D, nice potion system, being able to adjust the vertical angle, interesting god and potion system.

Clash of Clans with a Roman theme, takes a lot of time to load, 3D glitches with collisions, hard to read in battle, drop of frame rates, horrible selection system, placing building is a chore, too few innovations.



DATA SOURCES AND ANALYSIS



Mid-Core Dungeon Crawler



Core RPG



Casual to Mid-Core Brawler



Core Exploration RPG



Core PVP City Builder

All data comes from ad networks, Flurry, Adjust

<Special Thanks to Lysiane Charest>

KEY ASSUMPTION AT THE START

Old Data is Worse Than No Data

AT WHAT PRICE AN INSTALL?

“Google Play average CPIs rose by about 5% to \$1.06.”

–Chartboost, July 2014

“In Q4 2013, iOS CPI rates...ranged between \$.90 in China and \$2.59 in Australia. The average CPI among all countries was \$1.31”

–Distimo, February 2014

“Android [CPI's] dropped 29 percent to \$1.27 in January from its December spike of \$1.80...iOS increased 13 percent in to \$1.01 in January from December's \$0.88”

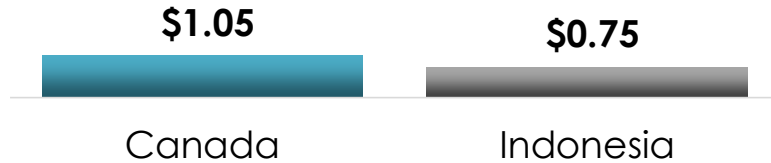
–Fiksu, March 2014

“CPI for social games in the US reached \$2.25 (June 2014) the highest it's been in a year.”

–SuperData Research, August 2014

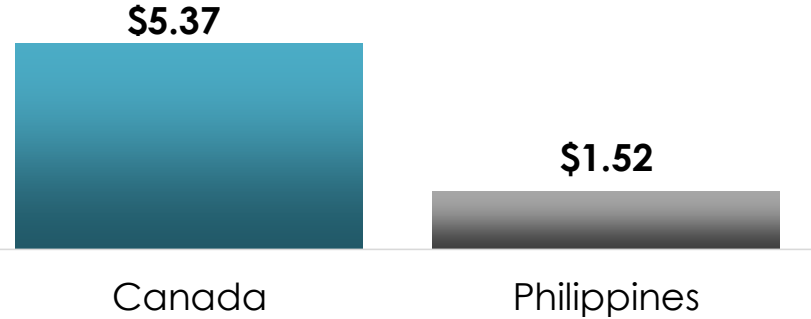
SOUTHEAST ASIA IS THE NEW CANADA

Chartboost CPI* for BAMF!
on iPhone



*October 2013

Facebook CPI* for WinterForts
on iOS



*August & September 2014

IT'S ALSO THE NEW AUSTRALIA

Facebook CPI* for TOoS
iPhone

\$3.92

\$1.13

Australia

Philippines

*June 2014

Facebook CPI* for TOoS
iPad

\$6.28

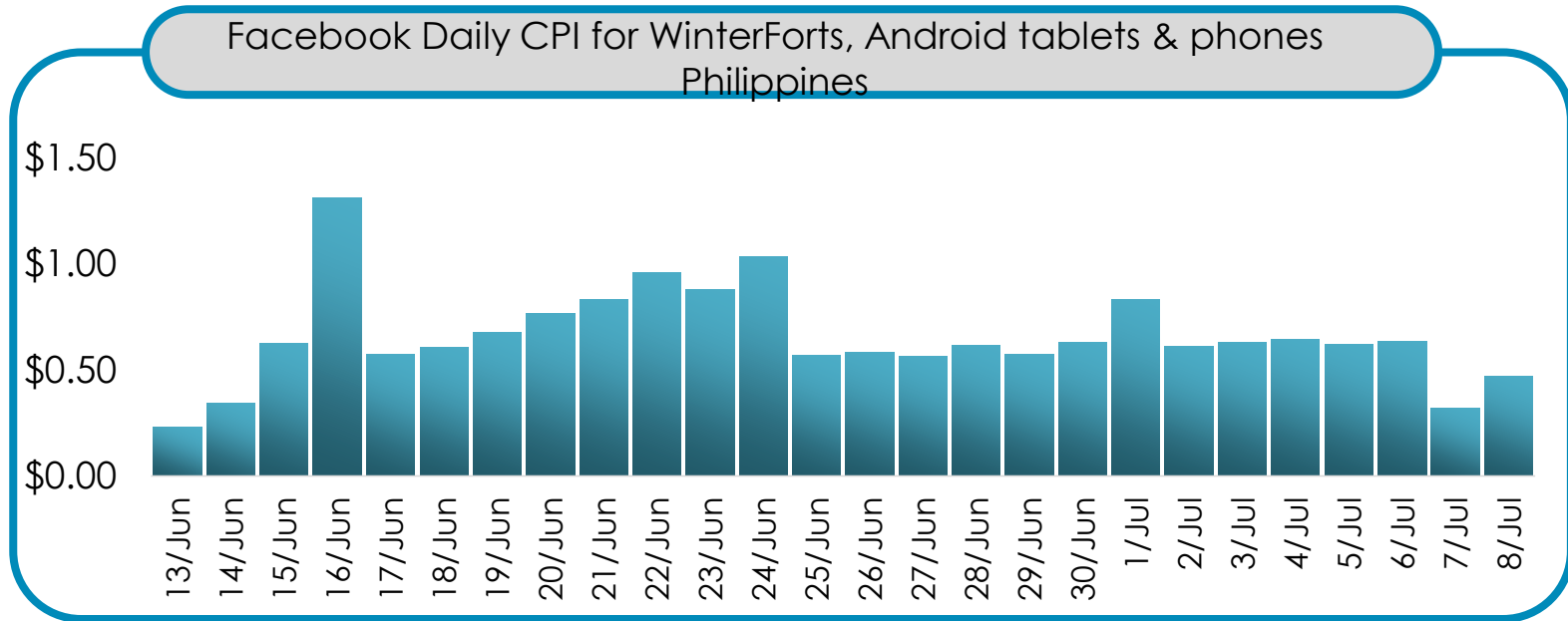
\$2.19

Australia

Philippines

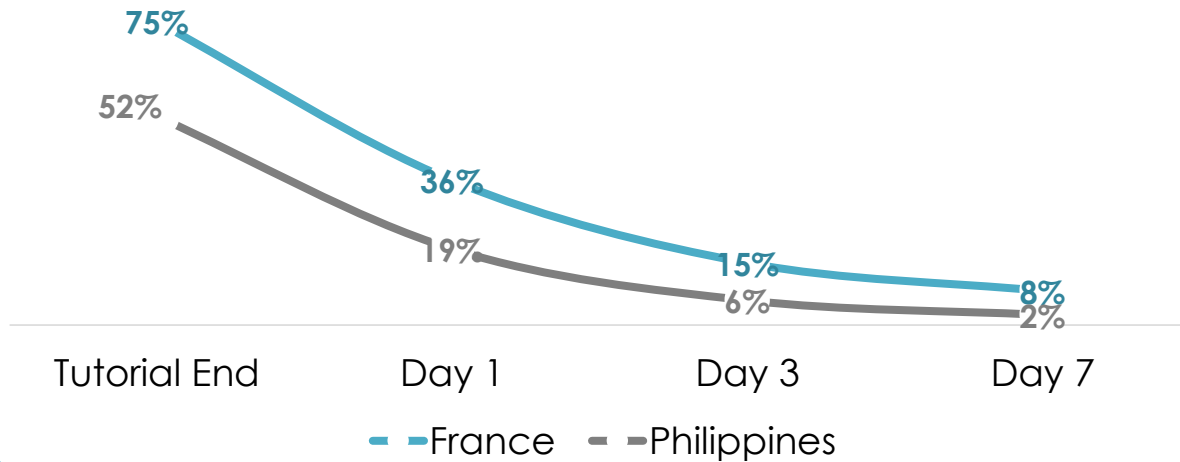
*April & May 2014

SOUTHEAST ASIA IS A BIG PLACE

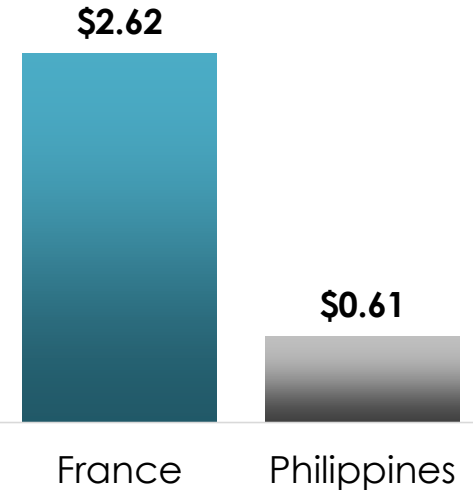


RETENTION RATE VARIABILITY

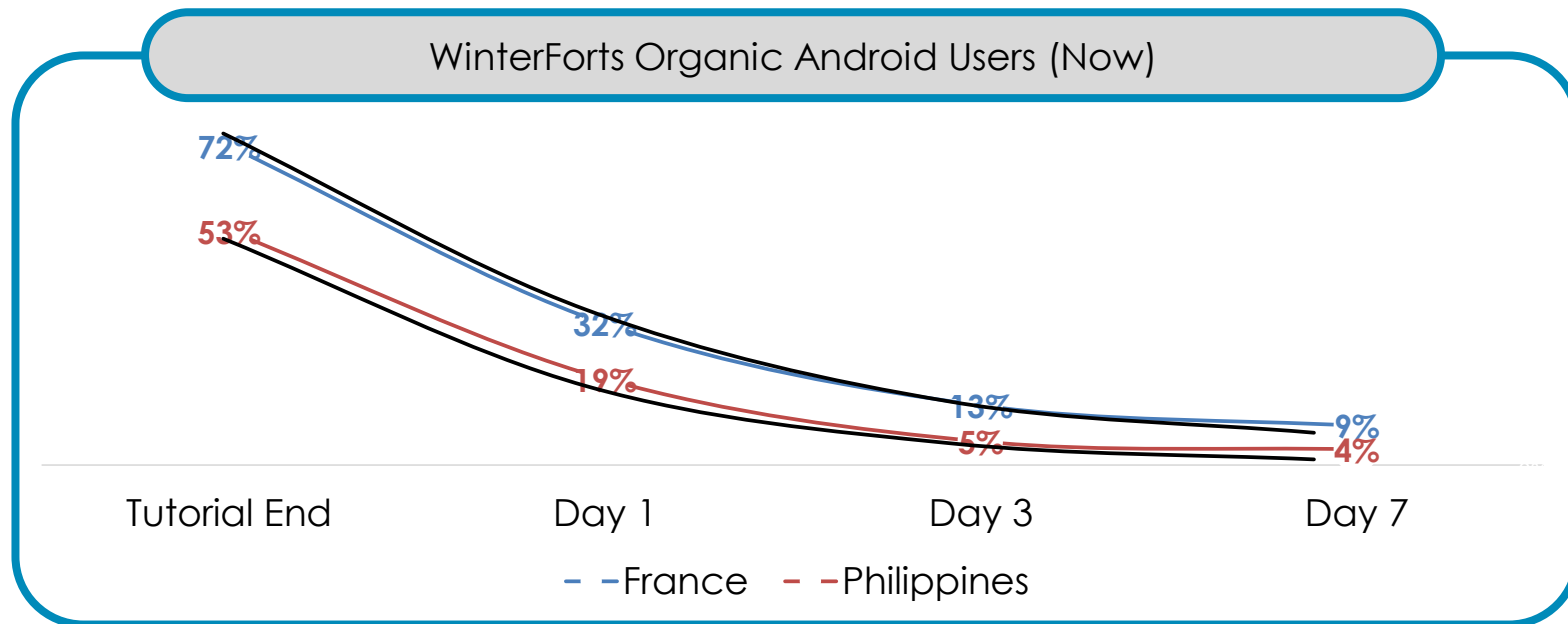
WinterForts Paid Android Users



CPI



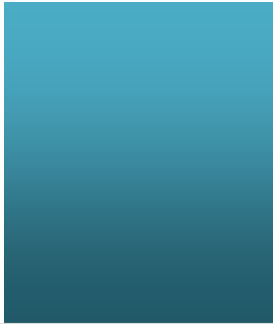
FTUE COMPLETION RATE VARIABILITY



SWEDEN VS INDONESIA: CHARTBOOST

The Order of Souls: iPad CPI

\$1.85



Sweden

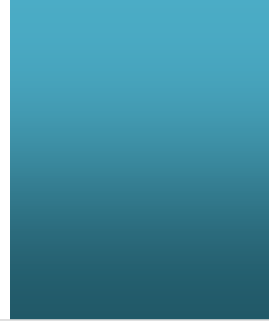
\$1.60



Indonesia

Shattered Planet: iPad CPI

\$1.84



Sweden

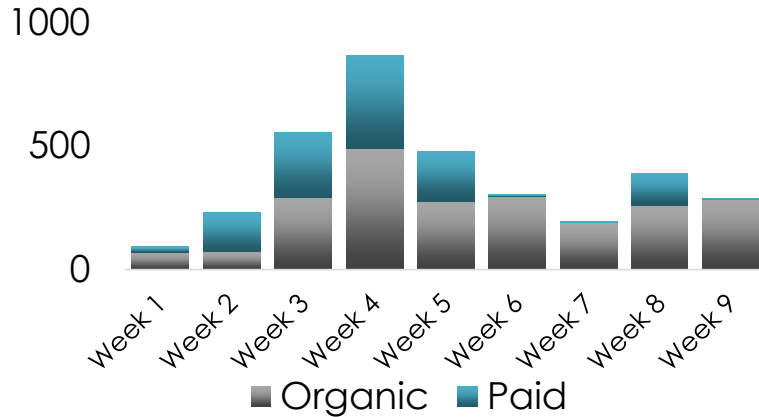
\$1.00



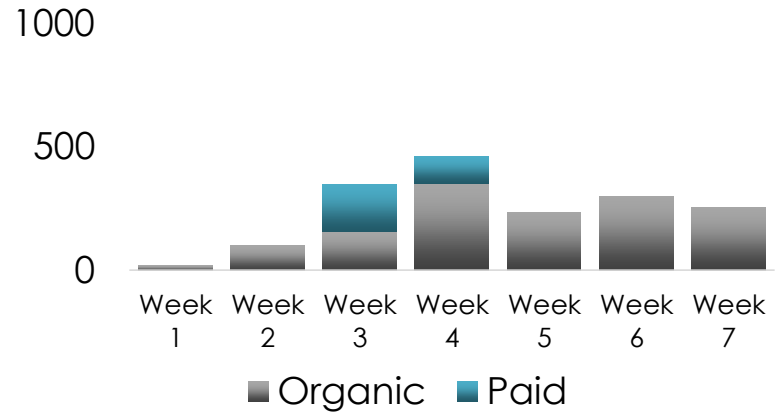
Indonesia

SHATTERED PLANET SOFT LAUNCH

iOS Installs



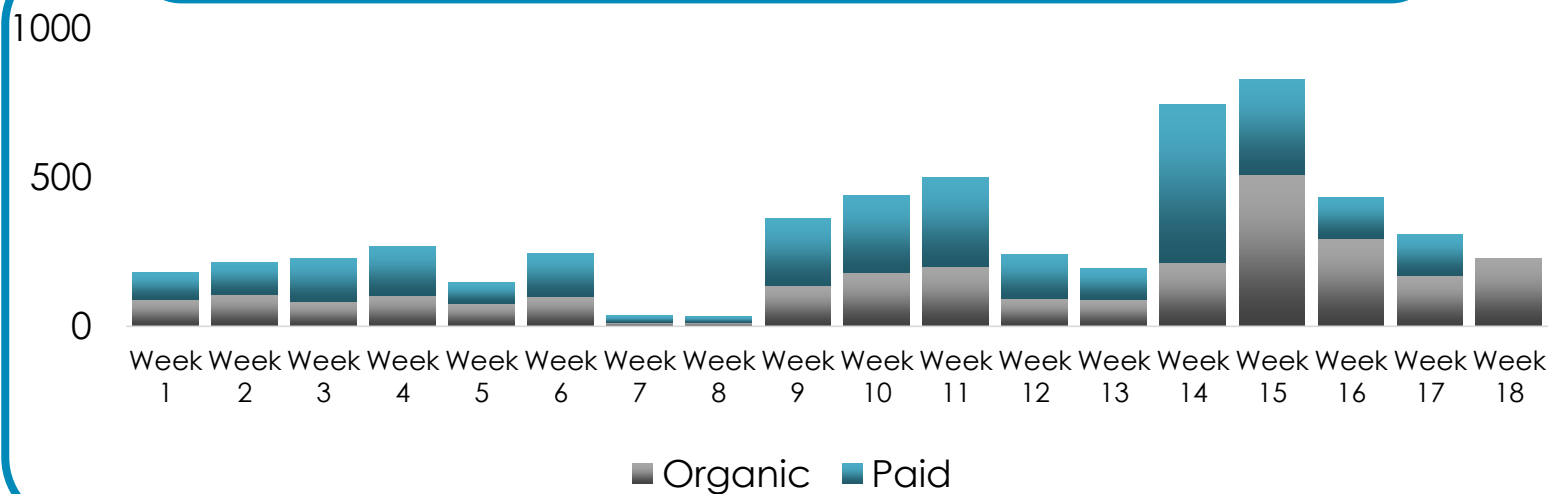
Android Installs



\$3.6k spent during soft launch (3 months, 2 platforms)

DON'T SOFT LAUNCH AS TABLET ONLY

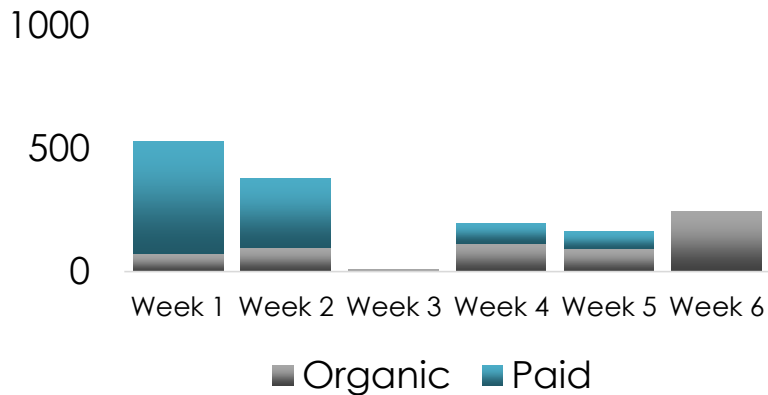
The Order of Souls iOS Installs – iPad and iPhone



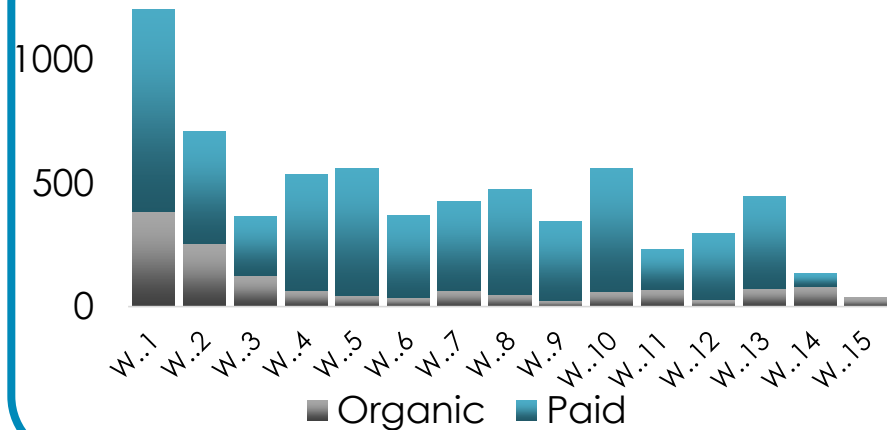
\$8k spent during soft launch (4.5 months, 1 platform)

WINTERFORTS SOFT LAUNCH: RELYING ON ANDROID

iOS Installs

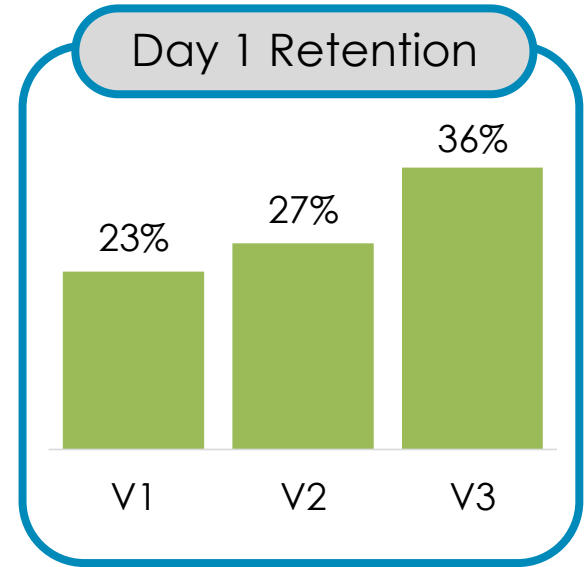
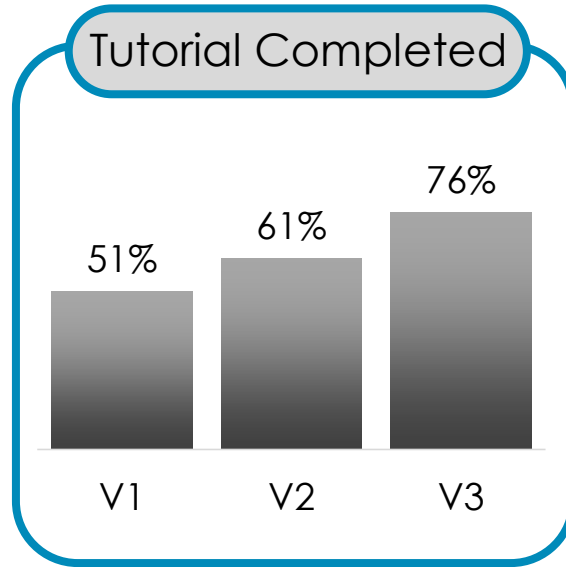
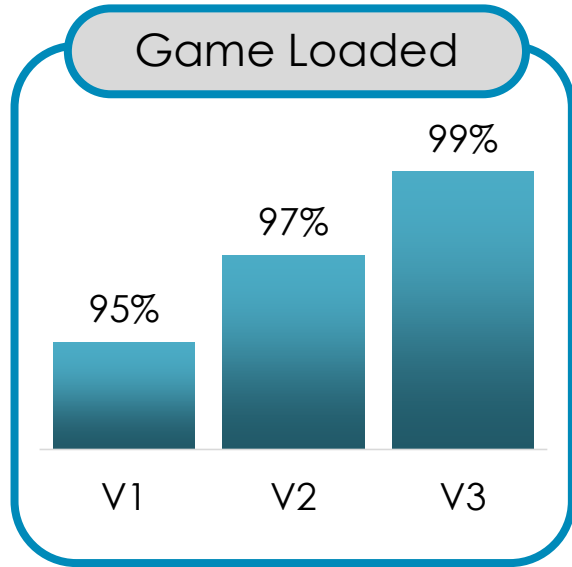


Android Installs



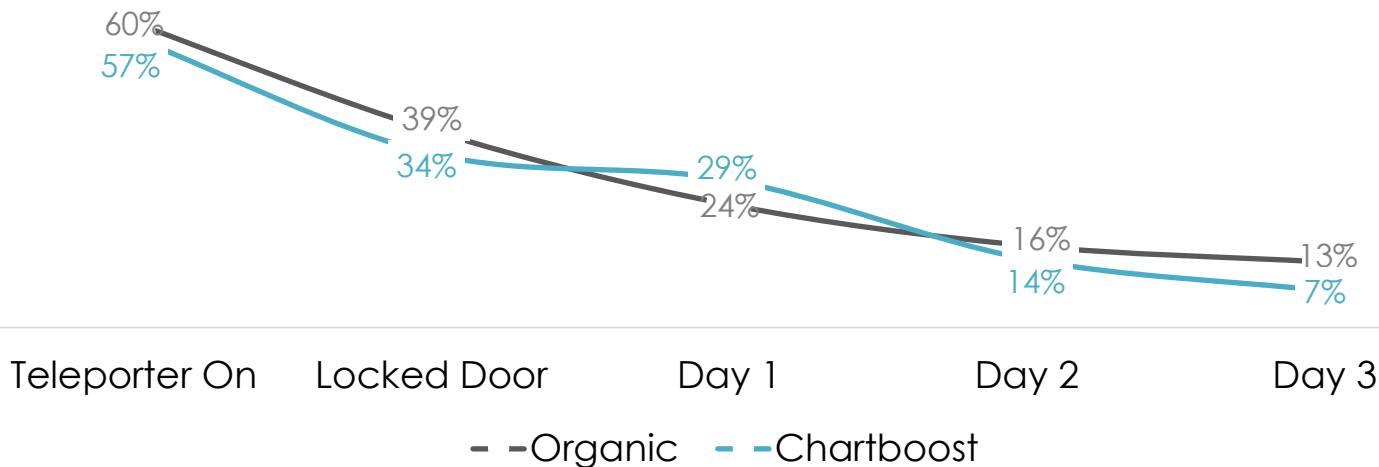
\$9k spent during soft launch (3 months, 2 platforms)

THE VALUE OF FREQUENT UPDATES: WINTERFORTS



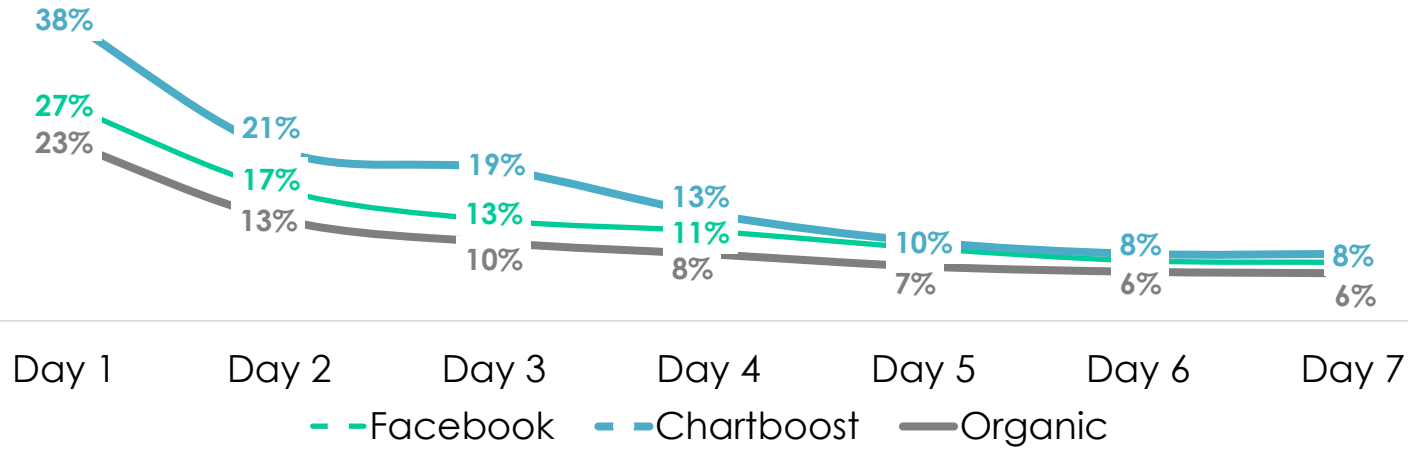
PAID VS. ORGANIC DIFFERENCES

Onboarding Funnel - Shattered Planet iOS



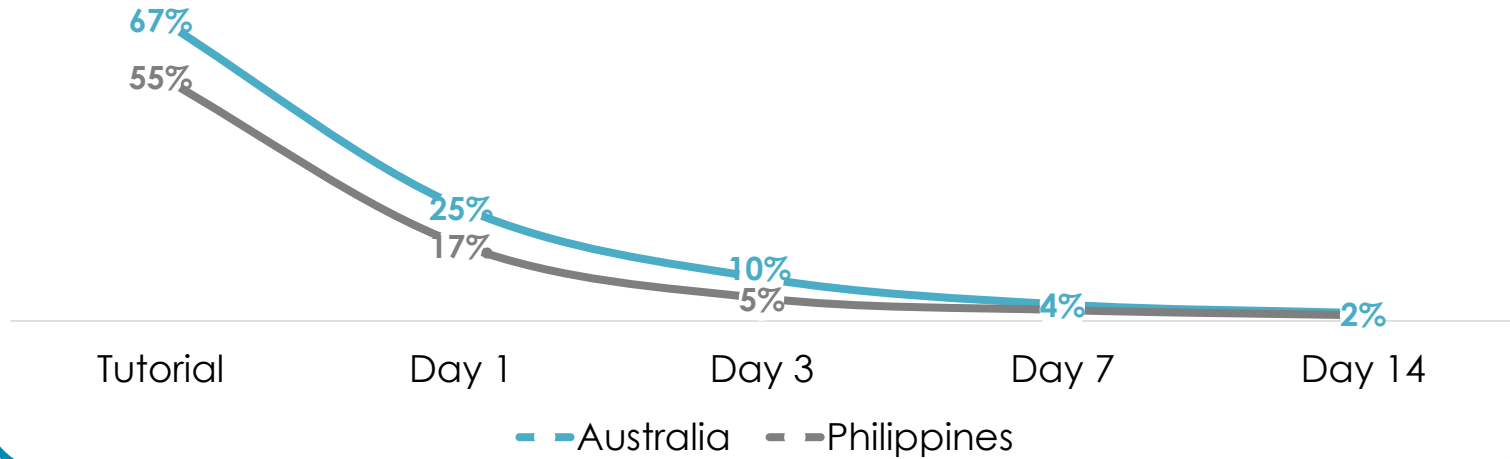
MORE ON PAID VS. ORGANIC

Absolute Retention By Source
Big Action Mega Fight! - US



WHAT TO DO WITHOUT ATTRIBUTION

The Order of Souls - iOS



A TALE OF THREE GENRES



Chartboost: Indonesia iPad

Impressions

Clicks

Installs

BAMF!

100%

12.4%

2.40%

CPI: \$0.62

Planet

100%

11.1%

0.66%

CPI: \$1.18

Order

100%

12.3%

0.94%

CPI: \$1.69

MORE IOS VS ANDROID CPI'S: FACEBOOK

BAMF CPI*: Canada

\$2.18



Android

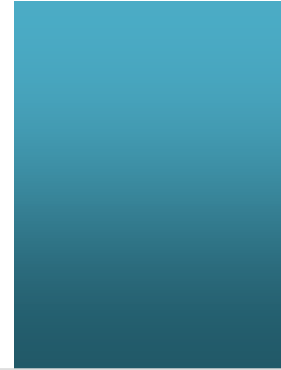
\$1.99



iOS

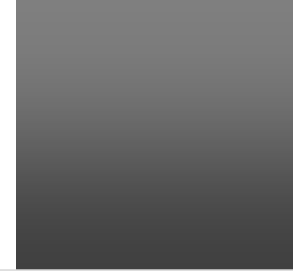
SP CPI*: Canada

\$2.74



Android*

\$2.01



iOS**

*February 2014

**January 2014

MORE IOS VS ANDROID CPI'S: FACEBOOK

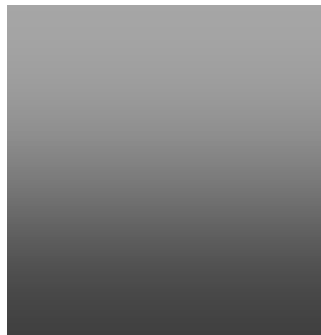
WinterForts CPI: Canada

\$5.53



Android*

\$5.37



iOS**

WinterForts CPI: Philippines

\$0.66



Android*

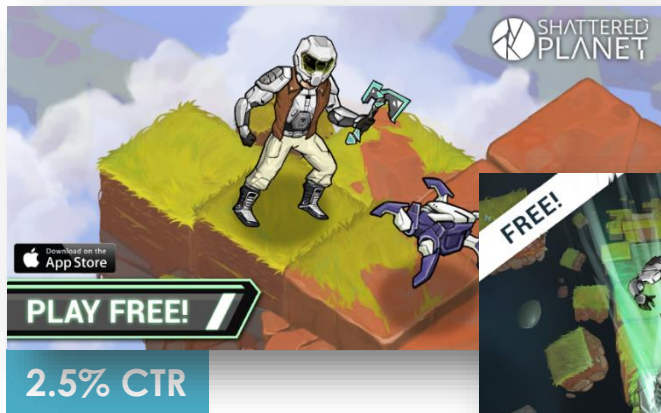
\$1.52



iOS***

*June to August 2014 **September 2014 ***August 2014

TESTING DIFFERENT CREATIVES, SAME TARGET



TESTING DIFFERENT CREATIVES, SAME TARGET



2.7% CTR



2.4% CTR



2.5% CTR

TESTING DIFFERENT CREATIVES, SAME TARGET



SAME GAME, DIFFERENT AUDIENCE TARGETING



2.7% CTR (Core)

Archer. Wizard. Warrior. Loot up, power up, don't die. Easy, right? Don't bet on it...

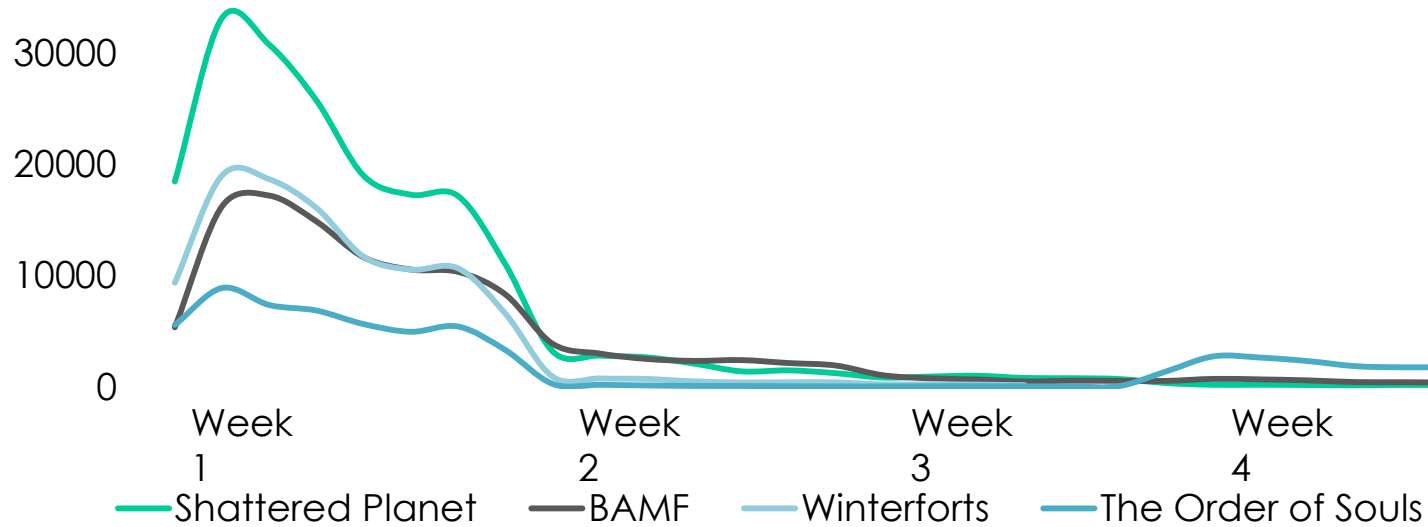


2.3% CTR (Casual)

Finally, a dungeon-crawling adventure game that anyone can play...but no one can put down!

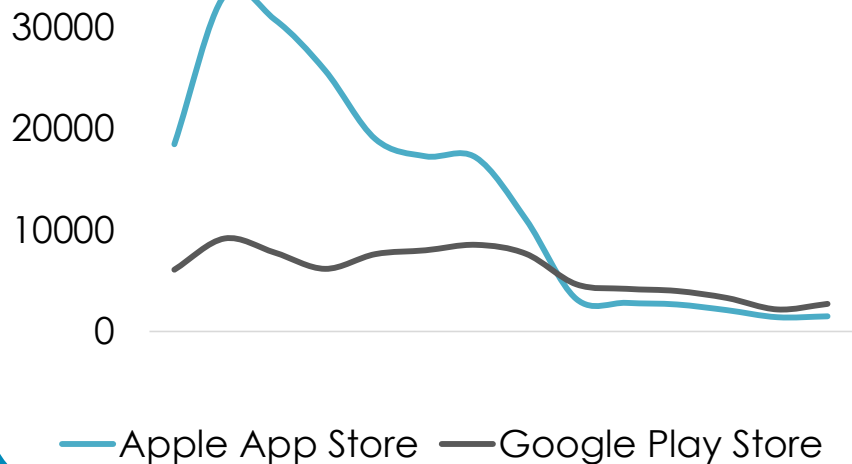
APPLE FEATURING IMPACT

Global Launch Daily Installs
Apple App Store

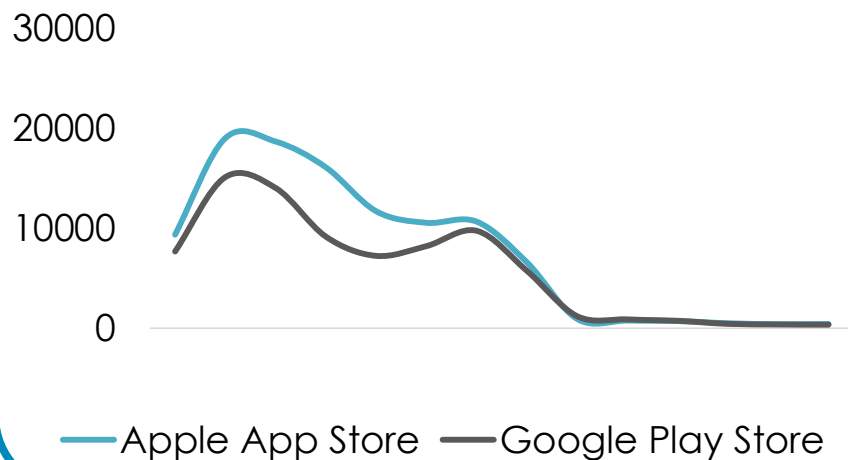


APPLE & GOOGLE FEATURING IMPACT

Global Launch Daily Installs
Shattered Planet



Global Launch Daily Installs
WinterForts



GOOGLE GOTCHAS

“Your game must provide players with at least five achievements that are distinct, unlockable, and designed for a variety of difficulty levels.”

“Your app's notification icons in the status bar must be completely white with no color.”

“Consider localizing your Google Play Listing's screenshots and feature graphic in all the languages where you've localized your description text.”

“Some promo slides are acceptable, but please upload at least one unaltered, high resolution (1280 x 800 minimum) screen capture for phone, 7-inch tablet, and 10-inch tablet to give users an unmodified view of the UI.”

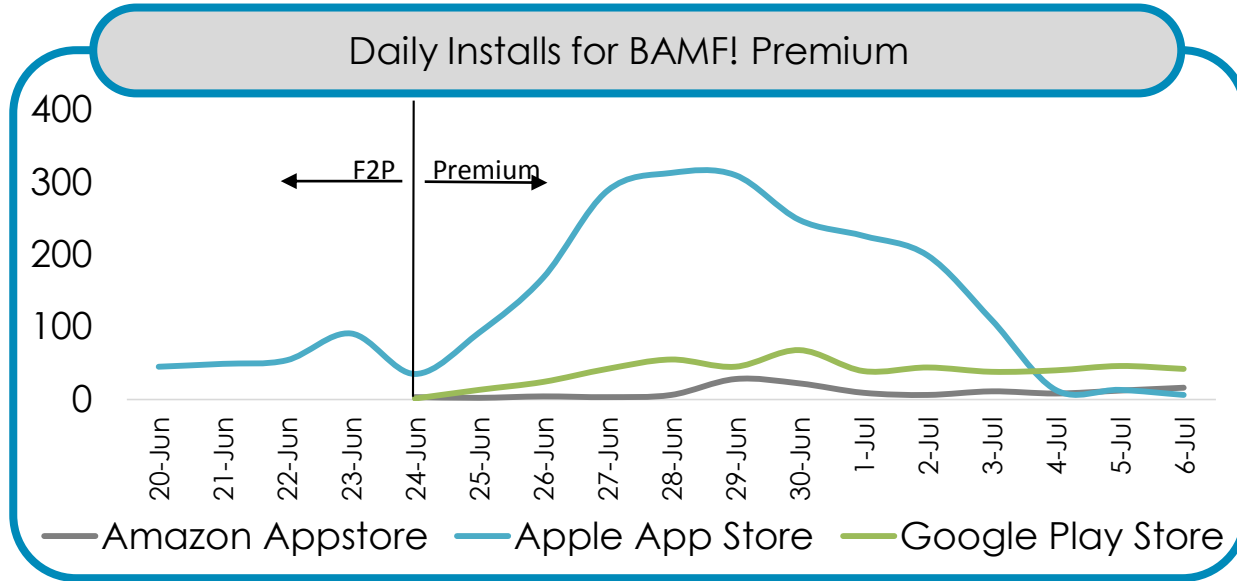
“Featured apps or games must not ask the user for a rating of 5 stars.”

“The app should hide the status and navigation bars when entering full-screen.”

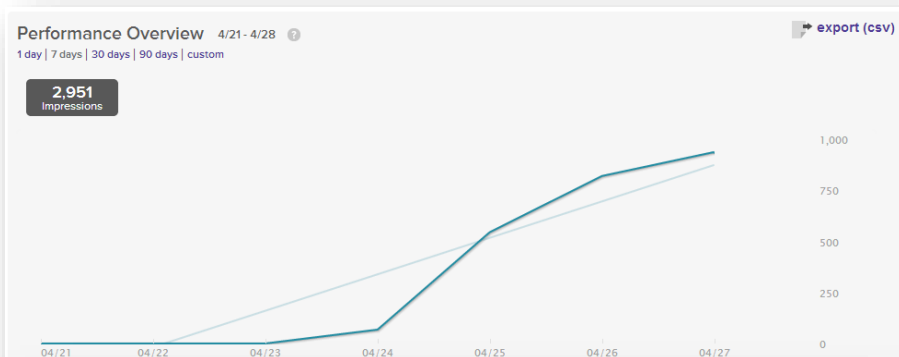
“When integrating Google Play Games Services, the controller icon is required wherever the default Play Games UI for Achievements and/or Leaderboards is invoked.”

“App icon resembles non-Android styling, using very rounded corners. Per Pure Android guidelines, please avoid this.”

BAMF PREMIUM FEATURING IMPACT



MORE MARKETING CREATIVITY



This game has been Greenlit by the Community!

The community has shown their interest in this game. Valve has reached out to this developer to start moving things toward release on Steam.

Results?

Two Months, F2P Mobile: \$20k

Two Weeks, Premium PC: \$45k




Average time to Greenlight: 90 days

Shattered Planet time to Greenlight: 8 days

THINKING AHEAD TO YOUR SECOND GAME

Home Updates **13** Backers **6,044** Comments **654** Montreal, Canada Video Games

Funded! This project was successfully funded on September 26.



LAST DAY!

MOON HUNTERS

STAFF PICK!

PLAY

6,044 backers
\$178,986 pledged of \$45,000 goal
0 seconds to go

Project by **Kitfox Games** Montreal, Canada

First created - **3** backed

Tanya Short 498 friends

kitfoxgames.com

See full bio Contact me

Share 5,541 Tweet Embed

Humble Store
PS VITA
PS 4



HOW NOT TO DO ICON TESTING

Attempt #1



Play epic dungeon crawler
MacGuffin Quest **FREE!**



Play epic dungeon crawler
MacGuffin Quest **FREE!**



Play epic dungeon crawler
MacGuffin Quest **FREE!**



Wizard, Knight, or Archer?
Play dungeon crawler *MacGuffin Quest* **FREE!**

CTR Range: .52%-.57%

Attempt #3



FREE
BEAT 'EM UP GAME



FREE
BEAT 'EM UP GAME



FREE
BEAT 'EM UP GAME

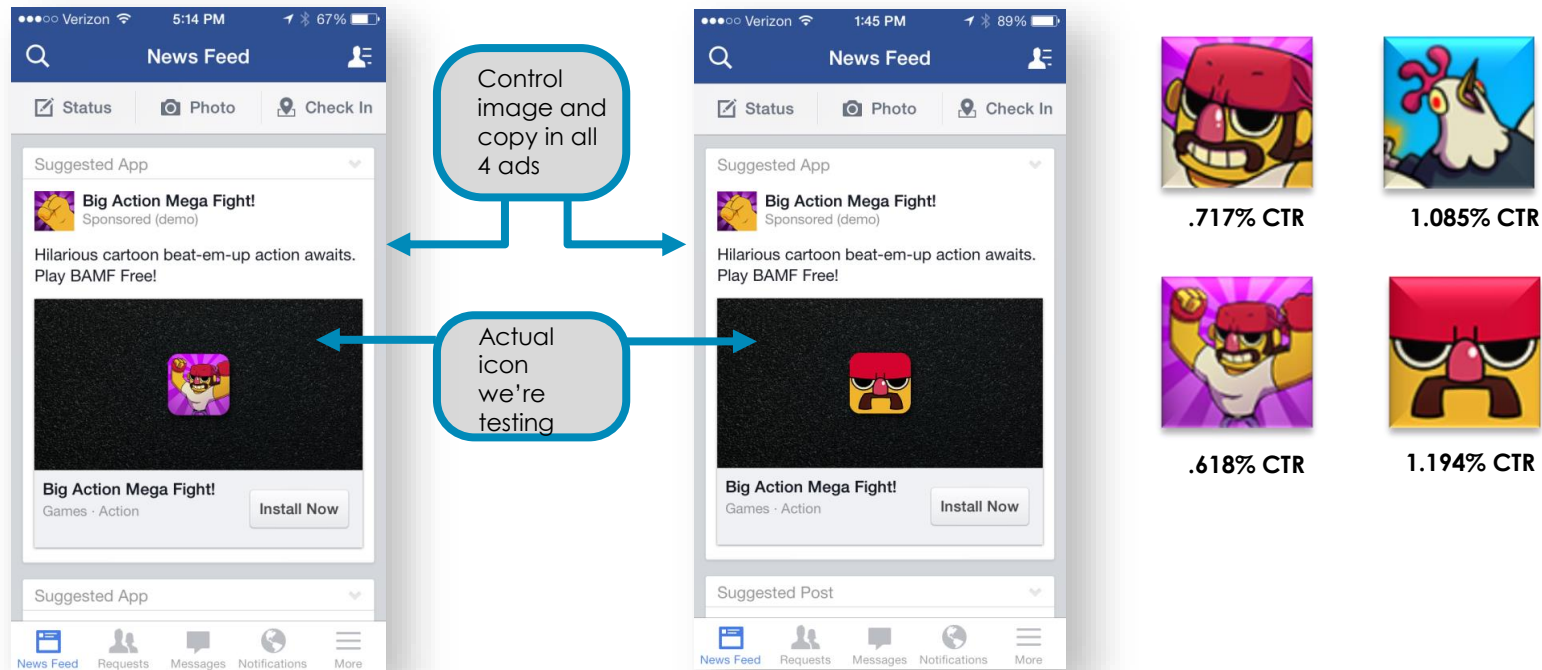


FREE
BEAT 'EM UP GAME

CTR Range: .44%-.52%

Back to the Drawing Board!

HOW (WE THINK) TO DO ICON TESTING



HOW TO PICK A WINNING ICON

Round 1



.8% CTR

Round 2



1.3% CTR

1.1% CTR

Round 3

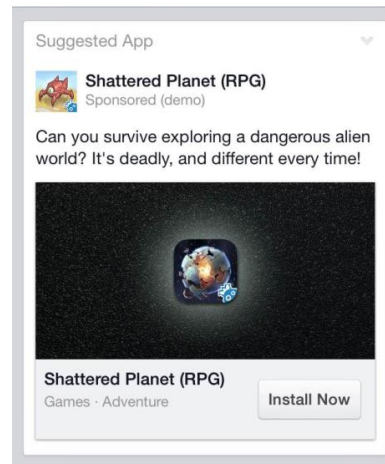


1.7% CTR

1.8% CTR

1.6% CTR

Winner, Winner!



Example Ad

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 **@Ztakk**



 **@ExecutionLabs**