

# DECONSTRUCTING THE PC FREE-TO-PLAY MARKET



**2015 FREE REPORT**

This version of the report focuses on the MOBA market

For more, contact Cooper Waddell at [solutions@eedar.com](mailto:solutions@eedar.com)



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CONTEXT IS EVERYTHING

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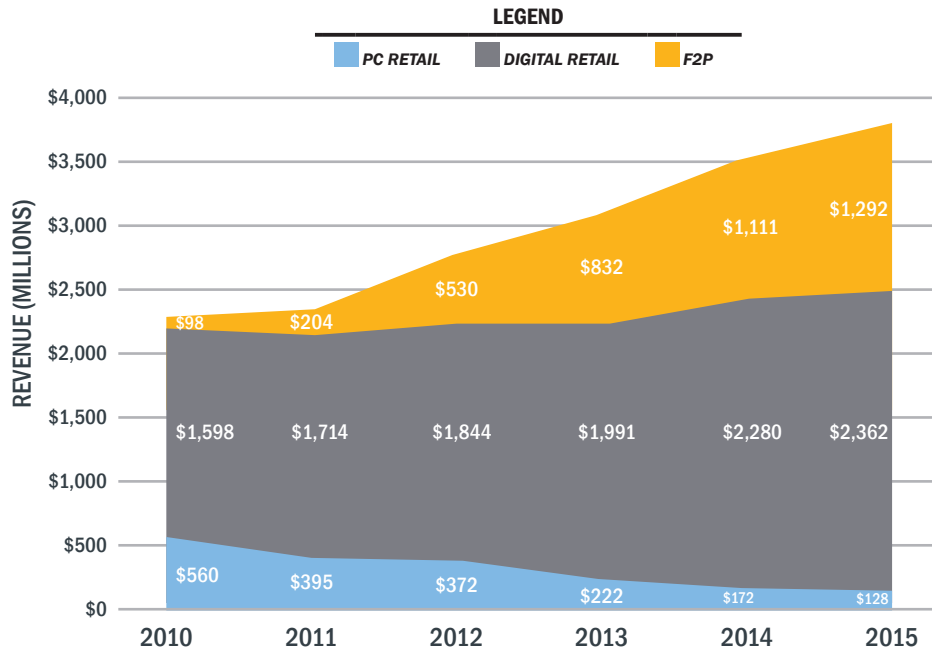
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## THE NORTH AMERICAN PC GAMING MARKET – F2P VS. P2P

## MARKET OVERVIEW PC F2P

DECONSTRUCTING THE PC F2P MARKET - 2015 FREE REPORT

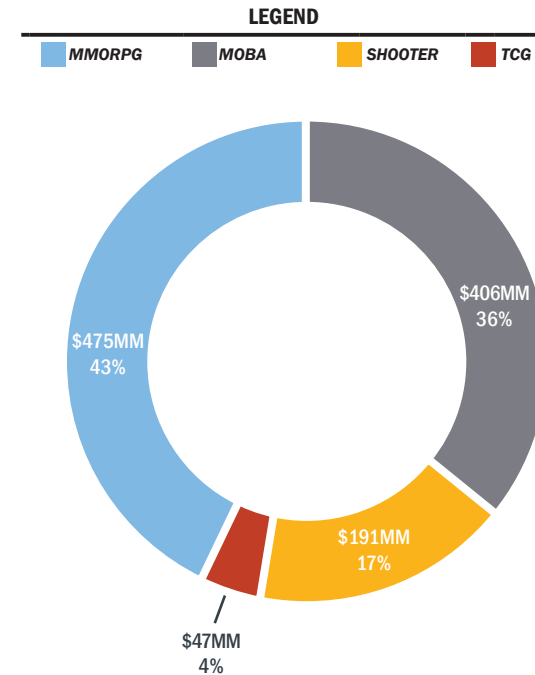
THE PC MARKET - VIDEO GAME REVENUES  
[NA][B2P+F2P+SUBSCRIPTIONS]



SOURCE: EEDAR

The PC gaming market reached \$3.6B in 2014, with nearly two thirds of that revenue due to the digital sales of video game titles. PC retail revenue was only a fraction of that, at \$172MM, while F2P games brought in some \$1.11B. EEDAR believes that the general trends within the PC market will continue as Digital sales continue to rise at the expense of Retail. Yet the **F2P market will be the fastest growing segment, increasing to \$1.29B by the end of 2015.**

PC F2P GENRE REVENUES  
[NA][2014]

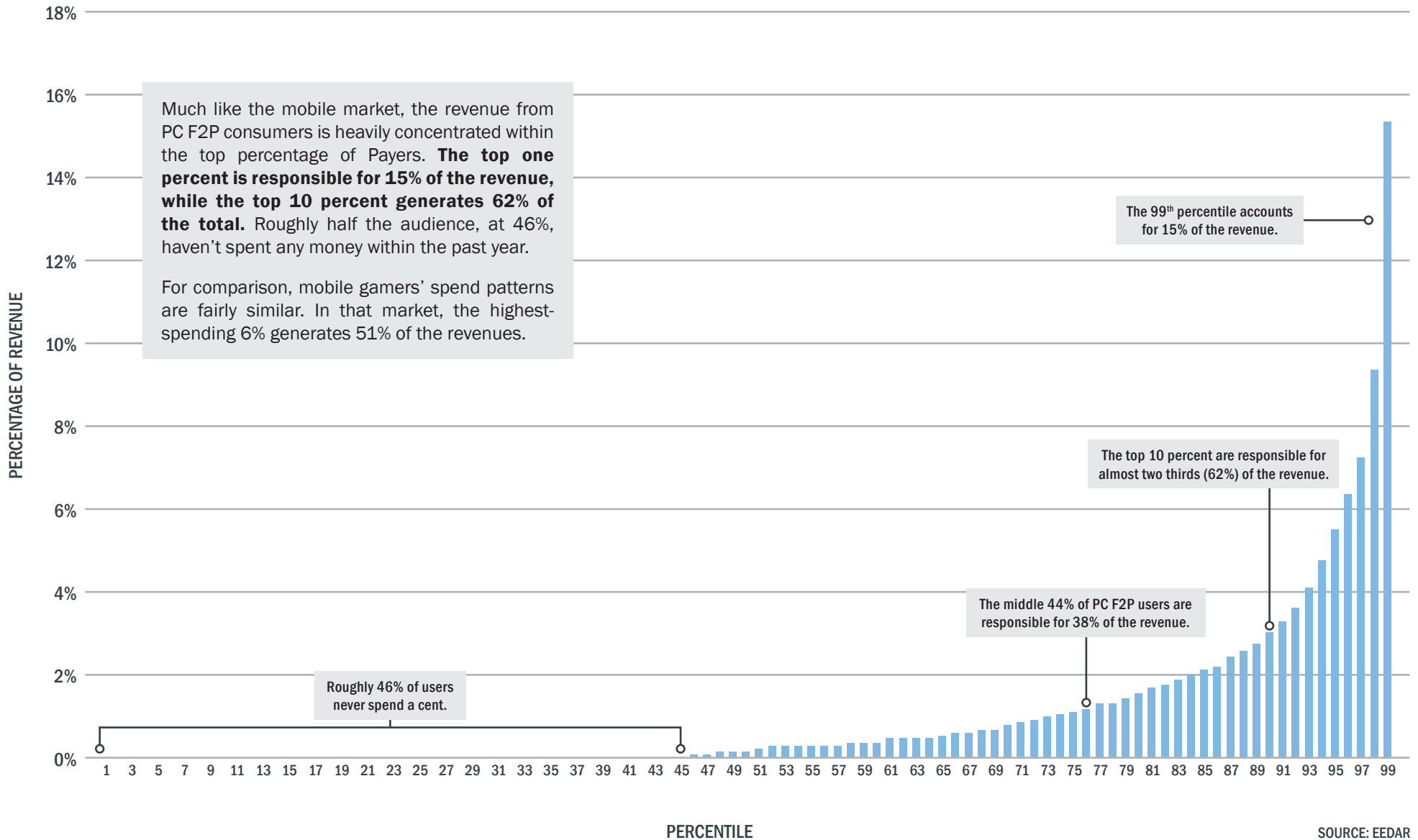


SOURCE: EEDAR

In the PC F2P Market, MMORPGs and MOBAs are the largest revenue drivers, though Shooters and TCGs also account for significant market share. MMORPGs are currently the largest segment, responsible for \$475MM in 2014 while MOBA games earned \$406MM. The Shooter genre is comparatively smaller, accounting for 17% of revenues at \$191MM, while TCGs were only at \$47MM.

### PC F2P SPEND SEGMENTATION

[NA][PC][2014]



SOURCE: EEDAR

## STRATEGY – HISTORY AND OVERVIEW

MOBA titles first appeared as a mod in Blizzard's *Warcraft III*, gaining a dedicated cult following with maps such as *Defense of the Ancients*. Yet it wasn't until 2009 when the genre truly arrived, as Riot's *League of Legends* would debut along with S2's *Heroes of Newerth*. While *Newerth* was initially a retail product and saw the higher user base, *League*'s F2P business model ultimately proved triumphant. Riot's gambit would be industry-defining, as *League* experienced exponential growth in the ensuing years to become the most played title in the world while also helping to usher in a market-wide acceptance of F2P.

Today, ***League of Legends* dominates the genre with *Dota 2* firmly established as the second most popular.** These two titles have a strong grasp on the genre's core users through constant content updates in conjunction with continued eSports support. Both titles have dedicated professional leagues, which have been immensely important in popularizing and legitimizing eSports as a medium.

With the success of current MOBAs, a deluge of competitors have flooded the market. EEDAR believes that the most successful titles will be those that bring in a new audience by delivering different experiences. **The third most popular MOBA in NA, *SMITE*, introduced a third-person camera angle while melding the MOBA and Shooter genres. Upcoming titles, such as Blizzard's *Heroes of the Storm* and Turbine's *Infinite Crisis*, have a more team-based approach or a big name IP (the DC brand), respectively.**

### CURRENT GENRE LEADERS:

- *League of Legends*
- *Dota 2*
- *SMITE*

### IMPORTANT UPCOMING TITLES:

- *Heroes of the Storm*
- *Infinite Crisis*

### TIMELINE OF IMPORTANT EVENTS

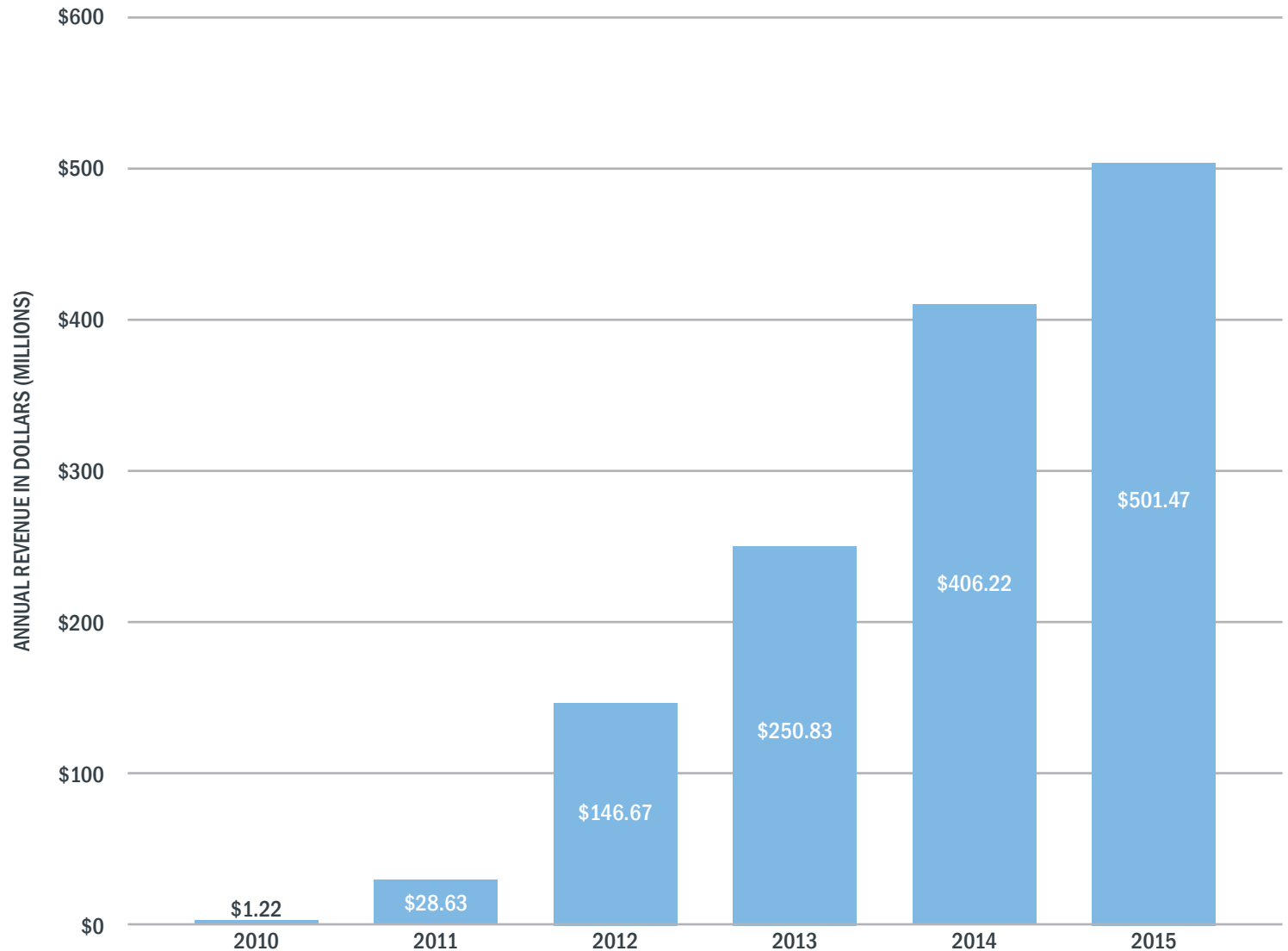
- 2003** – *Defense of the Ancients* first released as a mod map for *Warcraft III*
- 2009** – *League of Legends* debuts as a F2P title
- 2010** – *Heroes of Newerth* debuts as a retail title
- 2011** – *Heroes of Newerth* goes F2P  
*Dota 2* unveiled  
*Dota 2* holds The International tournament  
*Age of Empires Online* released
- 2013** – *Dota 2* officially released  
Turbine's *Infinite Crisis* Announced  
*League of Legends*' LCS Finals draw 32MM viewers
- 2014** – Hi-Rez Studio's *SMITE* is released  
EA cancels upcoming MOBA *Dawngate*  
Crytek's *Arena of Fate* announced  
Gearbox's *Battleborn* announced

**STRATEGY -  
NA REVENUE & USERS**

In North America, the PC F2P MOBA market generated \$406MM in 2014 and is expected to grow 23% to \$501MM by 2015. Within the F2P titles, MOBA is poised to deliver strong year over year growth. The subgenre only came into prominence in 2012, though it has nearly tripled its revenues since then.

MOBA titles have performed exceptionally well, recording immense growth while also helping to legitimize the F2P model. Much of MOBA's growth in 2014 was due to the continued rise of market leaders *League of Legends* and *Dota 2*, but EEDAR believes that many future entrants (such as *Heroes of the Storm* and *Infinite Crisis*) will continue to broaden the audience rather than cannibalize users.

**F2P MOBA MARKET REVENUE**  
[2010-2015][NORTH AMERICA][PC]



SOURCE: EEDAR



**MOBA –  
PLAYER DEMOGRAPHICS  
AND SPEND**

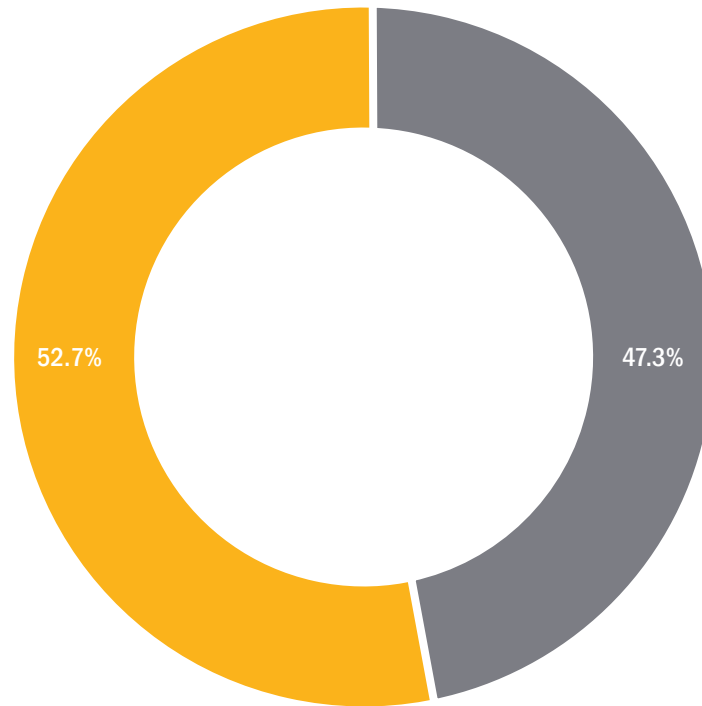
Over the past year, nearly half of all PC F2P gamers have played a MOBA title. Overall, that grouping of users is consistent with the demographics of the F2P space, having some 74% of users being Male.

On average though, MOBA gamers were comparatively younger than the other genres. MOBA players averaged 25.33 years of age compared to 26.37 for all F2P users.

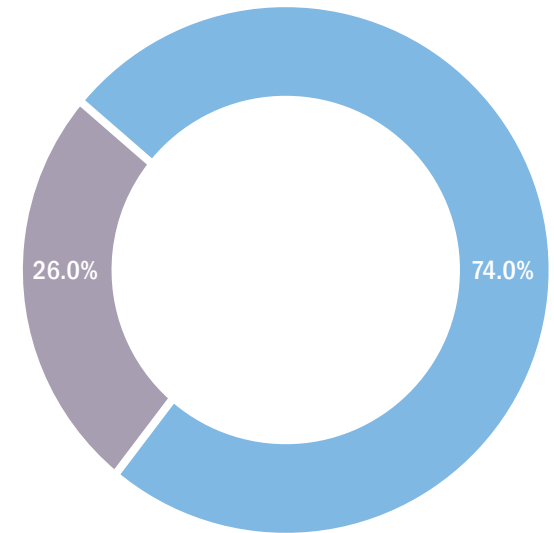
Male: Average Age: 25.26  
Average MOBA Annual Spend: \$28.50

Female: Average Age: 25.54  
Average MOBA Annual Spend: \$29.61

**F2P MOBA PLAYERS**  
[NA][PC][2014]



**F2P MOBA DEMOGRAPHICS**  
[NA][PC][2014]



**LEGEND**

- OTHER F2P TITLES
- MOBA PLAYER
- FEMALE
- MALE

SOURCE: EEDAR

### MOBA - MONETIZATION

Generally, the largest driver of revenue within MOBA titles are **Avatar Cosmetics**, which include **full-body character skins or vanity items for specific character gear slots**. More than a third of MOBA revenues, at 36%, is due to Avatar Cosmetics. The next largest revenue drivers were Hero and Champion Unlocks, which are a somewhat divisive issue in the genre. Both *Dota 2* and *Heroes of Newerth*, currently the second and fourth largest MOBAs respectively, have unlocked all their heroes for all users. Yet **Hero Unlocks were still responsible for 20% of all MOBA revenues**.

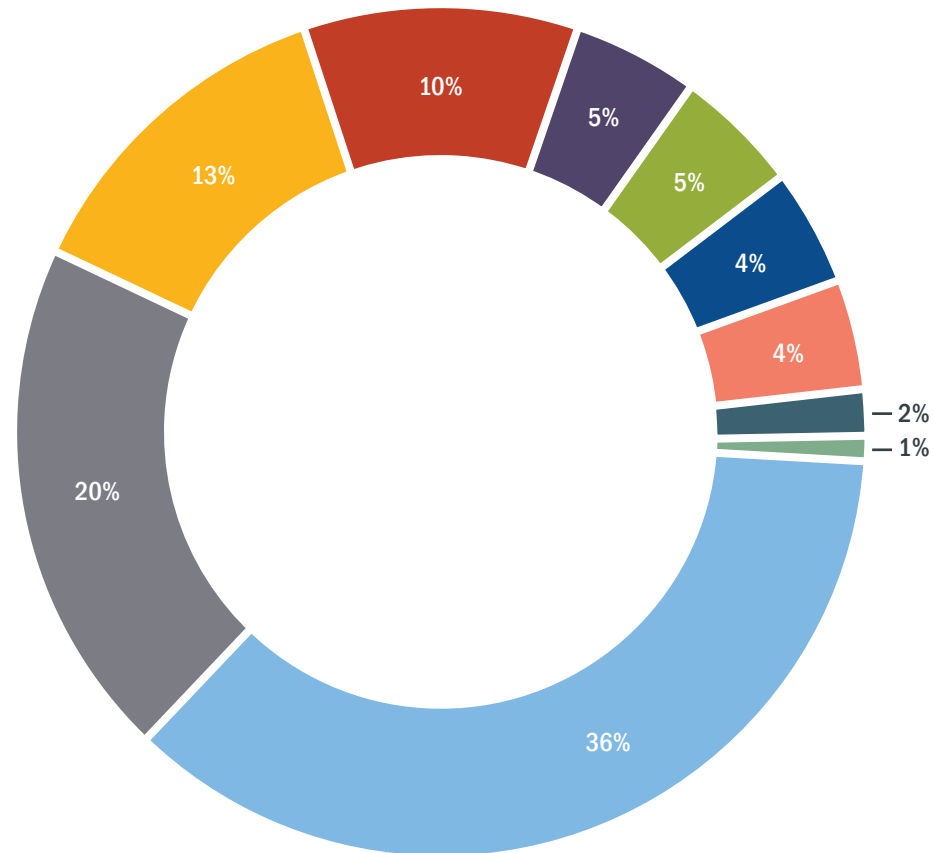
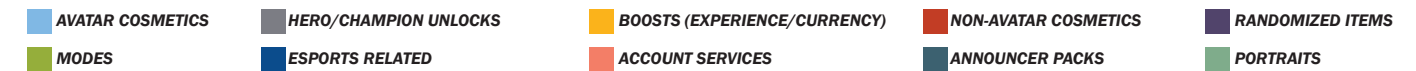
**Boosts are the third largest microtransaction category**, accounting for 13% of MOBA revenues. Boosts can either be for experience or soft currency, and these allow the player to generate resources at a faster rate over a predetermined amount of time.

Secondary Cosmetics, which are non-avatar items, were the fourth largest section at 10% followed by randomized items at 5%. These items allow the player to acquire an item at random, such as *Dota 2*'s loot chests. No other segments were responsible for more than 5% of the revenue.

### MOBA MICROTRANSACTION SHARE OF REVENUE

[F2P][NA][PC][2014]

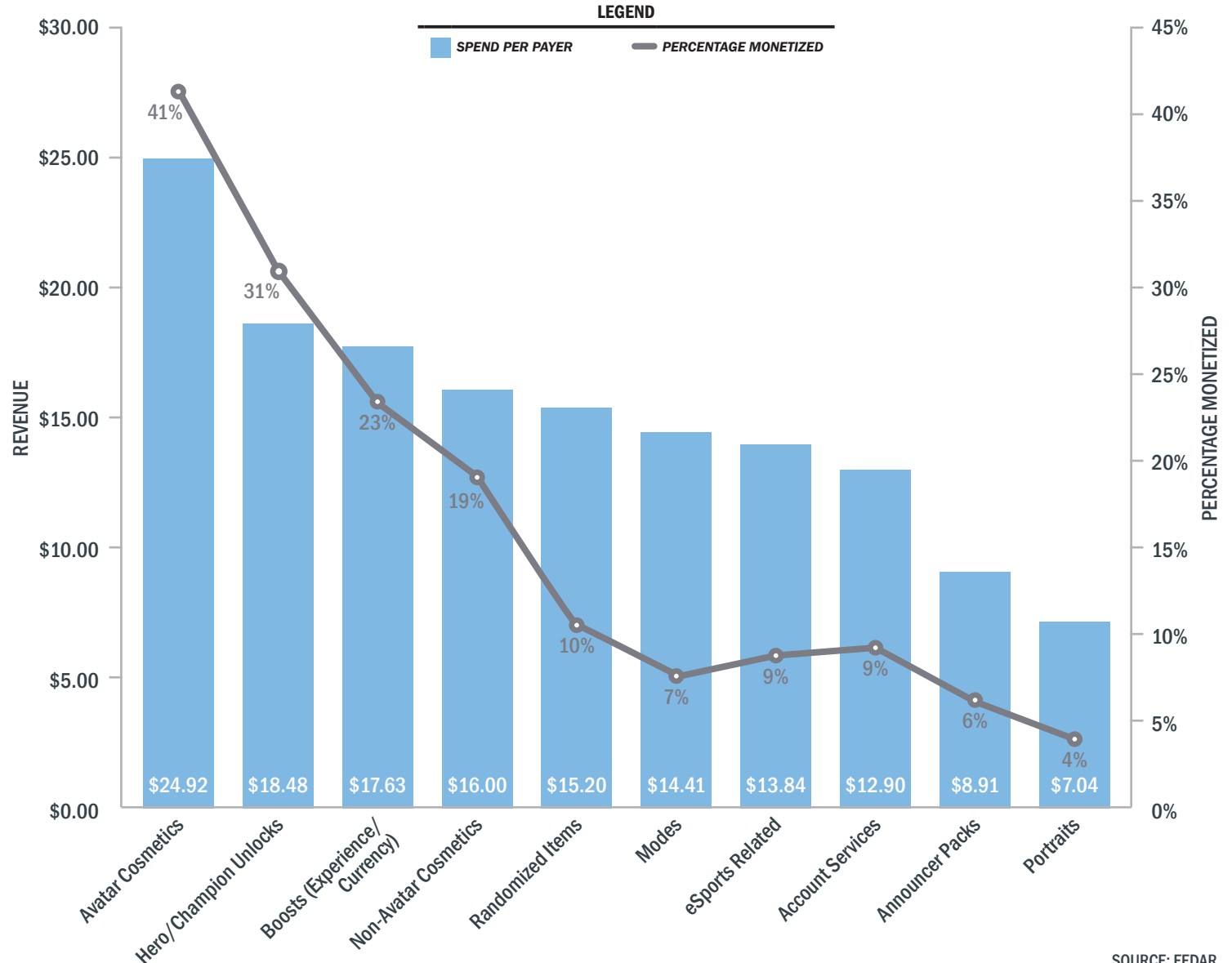
LEGEND



SOURCE: EEDAR

## AVERAGE SPEND PER PAYING USER BY MICROTRANSACTION

[MOBA][NA][PC][2014]



On average, a MOBA player who purchases skins will spend \$24.92 on those cosmetics over the course of a year. Furthermore, 41% of the MOBA audience has purchased that type of microtransaction. Generally, MOBA players spent significantly more on cosmetics compared to any other segment, which speaks to the deep engagement some players have for particular characters.

A little less than a third of MOBA players have monetized for Hero Unlocks, spending an annual average of \$18.48. Roughly a quarter of users have bought a Boost while nearly 20% purchased Non-Avatar Cosmetics. About 10% have bought chest keys for randomized loot, while no other segment had conversion rates in the double digits.

EEDAR notes that these monetization percentages are for the overall genres. Individual game monetization rates for each microtransaction type would be lower.

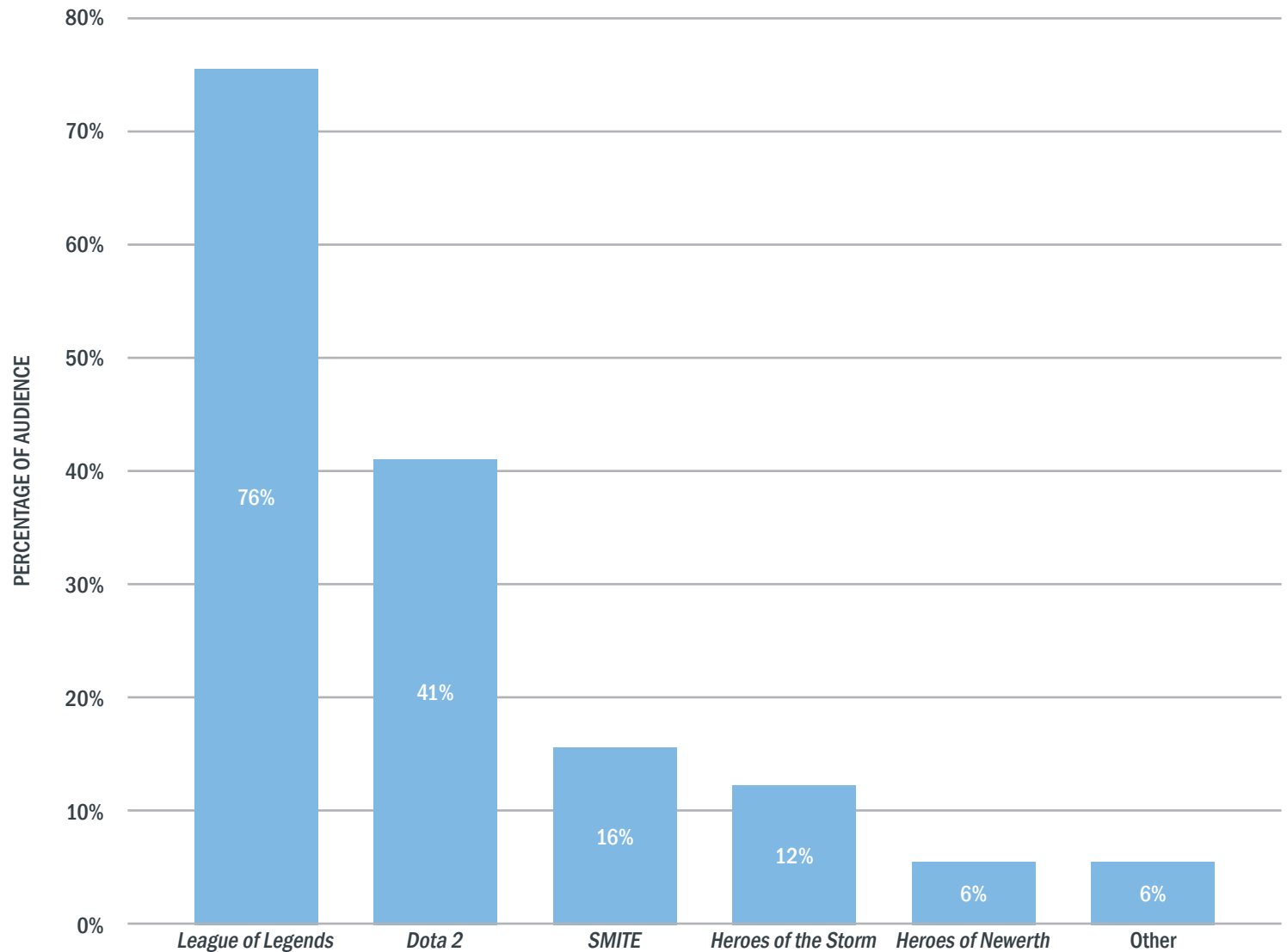
SOURCE: EEDAR

**MOBA - MARKET LEADERS ANALYSIS**

The Strategy genre, unlike Shooters or MMORPGs, has a few games that dramatically outpace the competition. This holds true for the MOBA subgenre in North America, where more than three quarters of the players have logged in to *League of Legends* over the last 6 months of 2014. Some 41% have played *Dota 2*, while the next largest title, *SMITE*, has been played by 16% of the audience.

**MOBA PLAYERS AND MOBAS PLAYED**

[NA][PC][JULY-DEC 2014]



SOURCE: EEDAR



2014 WESTERN MARKET KPIS

AVERAGE MAUs:	32.26MM	ANNUAL REVENUE:	\$650.18MM
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OVERVIEW

*League of Legends* is one of the biggest games in the world. It boasts 70MM MAUs worldwide, and it generated more than \$1B of revenue in 2014. The game relies on the standard 5v5 MOBA archetype, though its mechanics are easier than its chief competitor, *Dota 2*. *League of Legends* is also responsible for the explosion of eSports and regularly draws the largest number of viewers on Twitch.

↑ KEY STRENGTHS:

- **Consistent Updates and Vast Amount of Content.** *League of Legends* constantly updates their game, ensuring that players always have new content to explore. During its first two years after launch, *League* averaged 2.18 updates and 1.89 new heroes per month.
- **The Biggest Game in the World.** Being the biggest game in the world has myriad benefits, with the primary one relating to virality. *League's* players are that much more likely to recruit their friends since so many people are playing it.
- **Best-in-Class Marketing.** The developer blog, login screen, and shop do a tremendous job at telling players when a new item is available. Every user will be notified at least once that something new can be purchased.
- **Premier eSports Presence.** *League* commands the biggest eSports audience in the world, which dramatically helps with engagement. The 2013 Finals rented out the LA Staples Center while online streaming had 8.5MM concurrent viewers.
- **Highly Engaging Competitive Ladder.** Competitive play is a big part of *League*, resulting in continued engagement as users attempt to climb the ladder.

↓ KEY WEAKNESSES:

- **Toxic Community.** *League of Legends* is known for its toxic community. Due to the length of the games (45 minutes on average) and how there are preferred roles, many players will encounter instances of verbal abuse. *League* has attempted to curtail toxicity through a player self-policing system, but the results have so far been lackluster. EEDAR notes that toxicity is often a recurring problem throughout the MOBA genre.
- **Lack of Different Modes.** Primarily, *League* takes place on a single 5v5 map while its other maps have gained little traction. This increases churn rates, since players will look to other games for variety. Instead, *League* has attempted to keep retention high by introducing modes that disappear over time and tie into specific events. One example is URF mode during April Fools, which dramatically altered the gameplay by speeding everyone up.
- **Aging Title.** *League of Legends* was released in 2009, which makes the title more than 5 years old. Even for the title's most core users, many of the champions, maps, and mechanics will have gotten old. In response, *League* has updated visuals for both champions and maps.

→ CONSUMER TARGET: Casual to Core

*League of Legends* has massive widespread appeal, and much of this success is due to a philosophy of inclusion. *League* attempted to be a more forgiving MOBA than *Dota 2* through in-game mechanics that were less punishing. Coupled with its early adoption of the F2P model, *League* was able to attract all forms of players. Today, its market-leading size and eSports presence are further pillars in attracting and retaining users.

→ PRIMARY MONETIZATION: Aesthetics, Hero Unlocks & Boosts

↑ PROJECTED OUTLOOK: Market Leader

*League of Legends* will continue to be a market leader, especially as seasonal modes and updated views refresh the gameplay experience. EEDAR believes that *League* will maintain its overall player base even as new MOBAs enter the increasingly competitive market.



## 2014 WESTERN MARKET KPIS

<b>AVERAGE MAUs:</b>	4.34MM	<b>ANNUAL REVENUE:</b>	\$105.91MM
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## OVERVIEW

*Dota 2* is an updated version of *Defense of the Ancients*, a *Warcraft III* map mod that first brought MOBA games into popularity. Valve's MOBA differentiates itself in a number of key points, which include offering all their heroes for free while also being heavily promoted on the Steam service. In addition, *Dota 2* has been best-in-class when it comes to eSports, and was able to raise over \$10MM for their 2014 The International tournament.

## ↑ KEY STRENGTHS:

- **Exceptional Event Modes.** Valve's title is best-in-class when it comes to celebrating big events. Roughly every 2 months, significant events will occur, which can result in leaderboards or adding new, timed modes.
- **Amazing eSports Support.** This MOBA does an amazing job at supporting its eSports scene. The biggest success story is The Compendium, which allows players to buy a number of eSports related goods while also increasing a tournament prize pool.
- **Leverages Steam Community.** Steam reaches roughly 70MM people per month, which acts as a large potential audience for Valve's premier MOBA. In addition, the Steam community itself is responsible for many of the in-game cosmetic items. Valve effectively outsources much of *Dota 2*'s content development to its most ardent fans.

## STRATEGY OVERVIEW

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## ↓ KEY WEAKNESSES:

- **High Learning Curve.** Due to a number of mechanics such as minion denying and losing gold on death, *Dota 2* is an extremely unforgiving game and is difficult to learn.
- **Monetization Lowered by Free Heroes.** *Dota 2*'s monetization is somewhat hampered since every unit is free.

## → CONSUMER TARGET: Core to Hardcore

*Dota 2* is one of the most mechanically demanding MOBA titles, which makes it extremely difficult to pick up in comparison to its peers.

## → PRIMARY MONETIZATION: Aesthetics &amp; eSports

*Dota 2* monetizes very well due to its reliance on User Generated Content for many of its aesthetics. In addition, *Dota 2* is best-in-class when it comes to covering eSports events, which have resulted in multiple items that deal with Fantasy eSports, tournament streams, and team banners.

## ↑ PROJECTED OUTLOOK: Market Leader

Continued growth for the foreseeable future due to its occupation of the hardcore MOBA niche.



## OVERVIEW

*Heroes of the Storm* is Blizzard's entrant into the MOBA market. Its key USP is the use of Blizzard characters and the massive fanbase that entails. In addition, *Heroes of the Storm* will cater to a more casual audience: the gameplay mechanics aren't as difficult when compared to competing MOBAs while the title will also focus on teamwork rather than individual accomplishments. Much like how the developer refined MMORPGs and RTS titles, *Heroes of the Storm* looks to broaden the audience while delivering immaculate presentation.

### ↑ KEY STRENGTHS:

- **Blizzard-Published.** The Blizzard brand is still very strong, and the Battle.net ecosystem will aid the popularity of *Heroes*.
- **Accessible.** This MOBA has an exceedingly low learning curve due to the removal of items while also simplifying other gameplay choices, such as upgrading skills every level.
- **Quests as Engagement.** Quests are clearly specified and used to increase consistent engagement.
- **A Different Support.** The shared experience allows for a new type of support class, called Support Commanders, who never have to directly engage in battle but can still affect the outcome.
- **Secondary Team Objectives.** *Heroes of the Storm* focuses on team success, which means incorporating a variety of maps that have key team objectives while also tying a player's overall experience level to the team.

## STRATEGY OVERVIEW

### DECONSTRUCTING THE PC F2P MARKET - 2015 FREE REPORT

### ↓ KEY WEAKNESSES:

- **Lacks Depth.** There are no items to learn and last hitting has been removed. Players may feel the game is too easy to master.
- **Fewer Individual Heroics.** Most concerning, players never have a feeling of supreme power since EXP is shared throughout the team. A player will always be as powerful as his teammates, regardless of how well he performs individually.
- **PvE Quests.** A focus on PvE quests could also be problematic, since MOBA titles so strongly rely on a human opponent to feel exciting.

### → CONSUMER TARGET: Casual to Mid-Core

Blizzard fans and the casual audience are the target. Matches are aimed to only last 15-20 minutes.

### ↑ PROJECTED OUTLOOK: Moderate to High Success

*Heroes of the Storm* currently lacks the deep strategic depth of competing MOBAs, which makes it unlikely to appeal to current players of *League of Legends* or *Dota 2*. Yet *Heroes of the Storm* is in a unique position to capture the ravenous Blizzard fanbase due to its welcoming mechanics and the immense goodwill tied to the company.

It will be highly difficult for hardcore and competitive players to keep engaging with Blizzard's MOBA title though.



## OVERVIEW

In 2014, nearly every major publisher has a MOBA in the works. Turbine boasts a particularly strong entrant in *Infinite Crisis* due to the exceptionally strong IPs attached to the title. *Infinite Crisis* will utilize the heroes and villains from DC Comics, which will broaden the game's widespread appeal. Players can live out the fantasy of pitting Superman versus Batman, while the gameplay design choices are also meant to lower the learning curve.

### ↑ KEY STRENGTHS:

- **Strong IP and Characterization.** The game does an excellent job of showing off DC personalities through in-game animations, audio, and gameplay.
- **Streamlining MOBAs.** *Infinite Crisis* will attempt to create a more intuitive MOBA. Players are rewarded for minion kills based on how much damage they do rather than having to last hit. Shopping is also streamlined as players can click on one button to quickly purchase the recommended item.
- **Caters to Different Play Styles.** The game also launches with a number of modes that emphasize different objectives and also have various map-specific devices such as meteors or doomsday lasers.
- **Map Variety.** There is also greater map variety and environments have a stronger impact on the gameplay.

## STRATEGY OVERVIEW

### DECONSTRUCTING THE PC F2P MARKET - 2015 FREE REPORT

### ↓ KEY WEAKNESSES:

- **Crowded Space.** Turbine's title is entering an extremely crowded market while still attempting to directly compete with *LoL* and *Dota 2* for player share.

### → Consumer Target: Mid-Core

*Infinite Crisis* looks to streamline a lot of the core MOBA features, but it will still look to target competitive PC players. DC Universe fans will also be interested.

### ↑ Projected Outlook: Moderate to High Success

*Infinite Crisis* can use the highly popular DC brand, making it especially popular for comic book fans. In addition, the game looks to offer a number of gameplay modes to better incorporate a wide audience. Finally, Turbine is heavily investing in eSports, which will also aid the title's longevity.





## STRATEGY OVERVIEW

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### OVERVIEW

EEDAR notes that a number of older franchises will likely experiment with the F2P business model. *Age of Empires Online* has been the most significant release, though *Command & Conquer* flirted with the idea. Key future entrants include *Total War: Arena* and EEDAR predicts *StarCraft II* will release a Free-to-Play portion of their multiplayer by 2016.

#### ↑ KEY STRENGTHS:

- **Strong IP.** These games already have a built-in audience, which will make it easier to capture players. This is especially true for some other titles that are nostalgic, such as *Command & Conquer*.

#### ↓ KEY WEAKNESSES:

- **Monetization System Concerns.** RTS titles have traditionally been unsuccessful as F2P games due to their core mechanics. Players control multiple units, so buying an aesthetic skin for one soldier doesn't feel noteworthy. In addition, RTS games strive for utmost balance, which means introducing new paid units would disrupt the gameplay.

→ **CONSUMER TARGET:** Mid-Core to Core

↑ **PROJECTED OUTLOOK:** Moderate to High Success

Many of the older franchises could see significant success depending on their gameplay mechanics. EEDAR believes that the *StarCraft II* multiplayer suite has the highest chances of becoming a market leader within the Strategy F2P genre.

### RESEARCH METHODOLOGY

Electronic Entertainment Design and Research (EEDAR) gathers its information from a variety of sources. EEDAR goes to great lengths to verify the accuracy of its information, as detailed below.

Where information is publicly available from an authoritative source, such as the issuer or the responsible industry agency, that data is used as authoritative. All authoritative information is then double checked by an EEDAR researcher through direct observation or by cross referencing the data with other authoritative sources. Where possible, the data that is visible to the consumer is used: this includes information printed on the retail boxed product or displayed on the manufacturer website. When discrepancies arise between authoritative sources, additional sources are checked until a clear consensus emerges.

Where information is not publicly available, EEDAR's internal staff performs directed studies to gather the appropriate data. Our researchers work using custom-built data collection and analysis applications. Each researched fact has an objective observation system which ensures that researcher bias is eliminated. Our data research is performed by multiple researchers simultaneously to ensure that individual facts are cross-checked before being input into the classification system established for that fact. Once information has been entered in the EEDAR Games Database, quality assurance staff reviews the data using boundary analysis tools to identify errors and pinpoint difficulties in the classification systems. Our quality assurance team maintains rigorous performance metrics and ensures that each report is validated to the highest quality standards.

EEDAR attempts to use standard industry vernacular and information classification whenever possible. Where industry standard vernacular or classification structures are not available, EEDAR uses its own vernacular and/or classification systems. This would occur in areas where no industry recognized authoritative body exists, or in areas where multiple authoritative sources use different classification systems. All of the classifications systems created for these reports by EEDAR researchers are detailed in the appendix sections of EEDAR documents. All data from sources other than the EEDAR Games Database are clearly cited.

### ABOUT EEDAR

Founded in 2006 by video game industry veterans, EEDAR is the largest specialty video game research firm in the world.

Leveraging a proprietary database of over 160 million internally researched data points from more than 120,000 physical and digital video game products, EEDAR is the sole provider of end-to-end integrated data analysis solutions that allow for the examination of every factor influencing the success of past, present, and future video game titles.

EEDAR's well-known services include GamePulse® (a continuously updated application converging data for physical and digital game industry research), sales forecasting, data feeds, discovery and recommendation technologies, and custom research services.

EEDAR is based in Carlsbad, California and has been recognized by Forbes Magazine as one of America's Most Promising Companies and also holds the Guinness World Record for the largest collection of video game facts and information.

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