[Newsletter] Entry #6 - Inudstrial Analysis

An industrial analysis of *Helldivers 2* is fascinating because while its success is owed in part to an industry trend, that same trend has also doomed many other similar games. Helldivers 2 is a live service game, which Dubois and Weststar describe as a video game release model where "studios indeterminately support and periodically release content incrementally for existing games instead of developing new games or stand-alone sequels" (Dubois and Weststar 2333). That means *Helldivers 2* wasn't a one-and-done release for Arrowhead Game Studios and Sony Interactive Entertainment. Instead, it has received frequent updates to expand its content over time.

As I've previously explained, this is most commonly done through the Major Orders, which players must work together to complete. *Helldivers 2* has received free updates which add new planets, stratagems, and enemy types to the game. In terms of paid content, new Warbonds are also released every couple of months, which players can then pay for to earn new weapons to use and customization options to choose from (Santos). The Warbonds are similar to the battle pass system found in many other games. Through those purchases, called microtransactions, developers and publishers of live service games can make a lot of money. Data shows that most playtime and revenue in the video game industry is now made from these live service video (Benfell). As a result, publishers like Sony Interactive Entertainment are constantly looking to create the next big hit in the space. *Helldivers 2* is the exception, but it is not the rule in this space.

While games like *Fortnite, Roblox, Minecraft*, and *League of Legends* continue to dominate the live service space, it's rare for a new game to break through. There have recently been a lot of high-profile failures in the space. Just around seven months after *Helldivers 2* was released, Sony delisted its live service hero shooter *Concord* due to its lackluster launch, never to

bring the game back online again (Ellis). Now, it's preemptively canceling live service video games from other live service studios before they even have a chance to release and succeed on the market (Schreier). By analyzing other aspects of *Helldivers 2* to demonstrate what's so unique about it, we can better understand how it's now more important than ever for new entrants in the live service space to be subversive in everything from gameplay to narrative to aesthetic if they want a chance at success.

Another interesting way that *Helldivers 2* stands out from the competition is that it's a paid release. To play *Helldivers 2,* you have to purchase it for $40. The majority of the most popular live service games are free-to-play titles that make their revenue completely from microtransactions. *Helldivers 2* benefits from being a paid release because its microtransactions aren't quite as intrusive as some of its genre peers. That said, it also exponentially increases the importance of Arrowhead Game Studios needing to keep the game relevant with updates so that purchases will always feel worth it for potential players. *Helldivers 2* succeeded at the toughest part for new live service games: convincing an initial group of players to buy into a premium game experience when there are free-to-play alternatives on the market. The fact that *Helldivers 2* succeeded at that is a testament to the game's appeal and shows how strong of a player it is now in the live service space.

The success of *Helldivers 2* and the failure of *Concord* is causing Sony Interactive Entertainment to reassess their live service projects in development. To succeed, it's clear that a paid live service game needs to be more like Helldivers 2 and less like Concord. To succeed within the wider live service space in the video game industry, a new live service game needs a compelling monetization model and a distinct appeal that allows it to stand out from all of its peers.

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