



LIQUID&GRIT

Puzzle Report

Competitive research and actionable product recommendations

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MARCH

2018

INTRODUCTION



Review how Angry Birds 2 uses new [Collection Sets](#) to drive revenue ... with a deeply integrated *Hat* feature that is tied to purchases, retention bonus, and competition.

See our deep analysis of [Subscriptions](#) ... not only for a potential step-function (but higher beta) revenue feature, but also for app Install *protection*.

To drive retention for harder-core players, check out Seekers Notes adaptation of a proven mechanic from Idle Games called [Prestiging](#).

This month's [Level Designs](#) include new *boosts* for your level design team ... in addition to new level mechanics.

In the [Market Watch](#), glean a snapshot of recent feature releases. Chests were utilized within a variety of apps. Angry Birds 2 released cash tournaments. And, leagues appear to be coming soon in Homescapes.

"To all who come to this happy place: Welcome. Disneyland is your land. Here age relives fond memories of the past, and here youth may savor the challenge and promise of the future." - Walt Disney, Speech on the opening day of Disneyland (July 17, 1955)

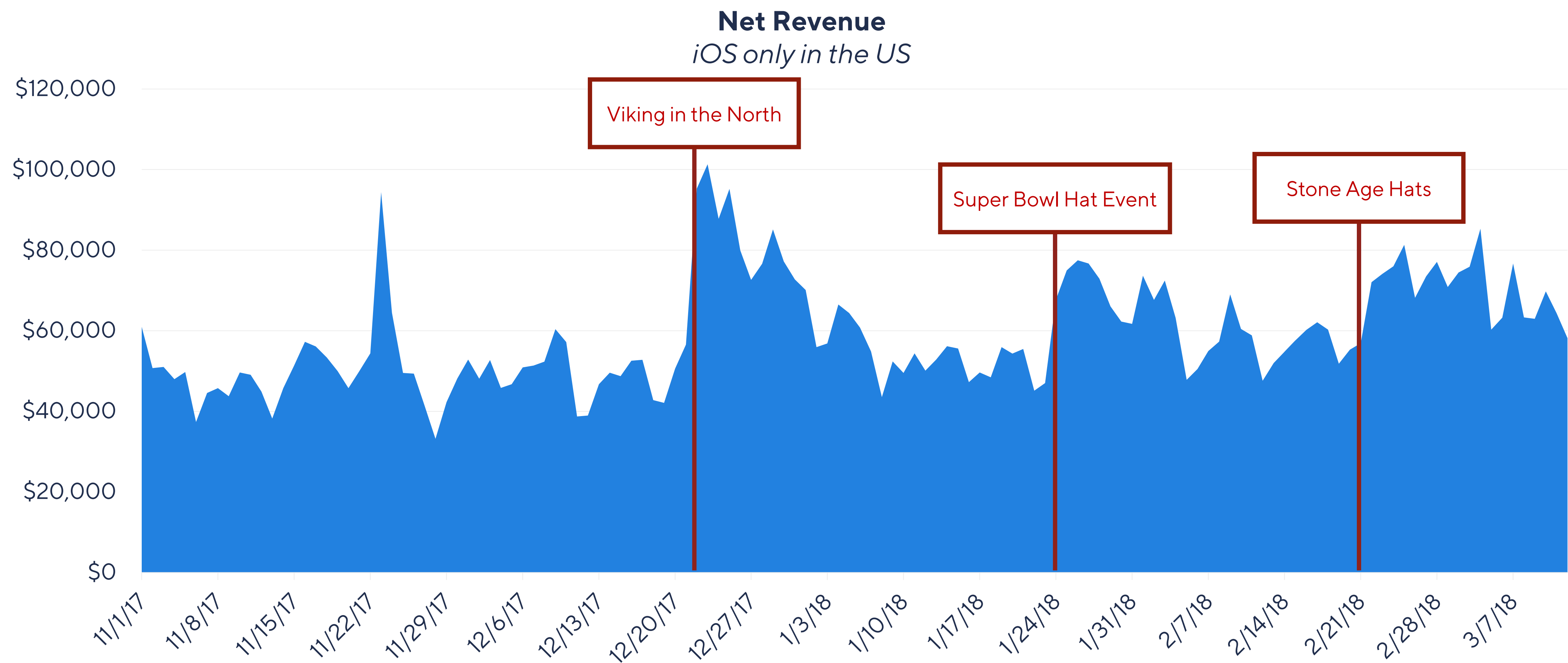


Brett Nowak
Editor-in-Chief

IMPACT FEATURES

COLLECTION SETS

Angry Birds 2 *Hats* continues to produce revenue spikes during *Hat* related content releases



Revenue data comes from Sensor Tower

COLLECTION SETS

The new Angry Birds 2 *Hats* collections are tied to the retention bonus, game play, and competition

Feature Explanation

- A bird's *power* ... and the score awarded when playing a bird ... is determined by the bird's *Slingshot*, *Character*, and *Hat* level (1)
- Players may collect *Hats* by playing the *Tower of Fortune* (daily retention bonus), club tournaments, and through purchases with currency, which is acquired during game play (2)
- Completing a *Hat* collection upgrades the *Slingshot*. This awards a higher multiplier after level completion, and in turn, helps players win in score-based competitions (3)
- Special *Hat* collections, like the [Viking in the North](#), have been released (4)
- The [Super Bowl Hats](#) included NFL IP *Hat* collections (5 & 6)
- Special collection *Hats* cannot be purchased like other *Hats* ... they may only be earned in the *Tower of Fortune* (7)
- During events, completing a collection increases the *Hat* multiplier to 13x for that event's tenure (8)

Additional Information

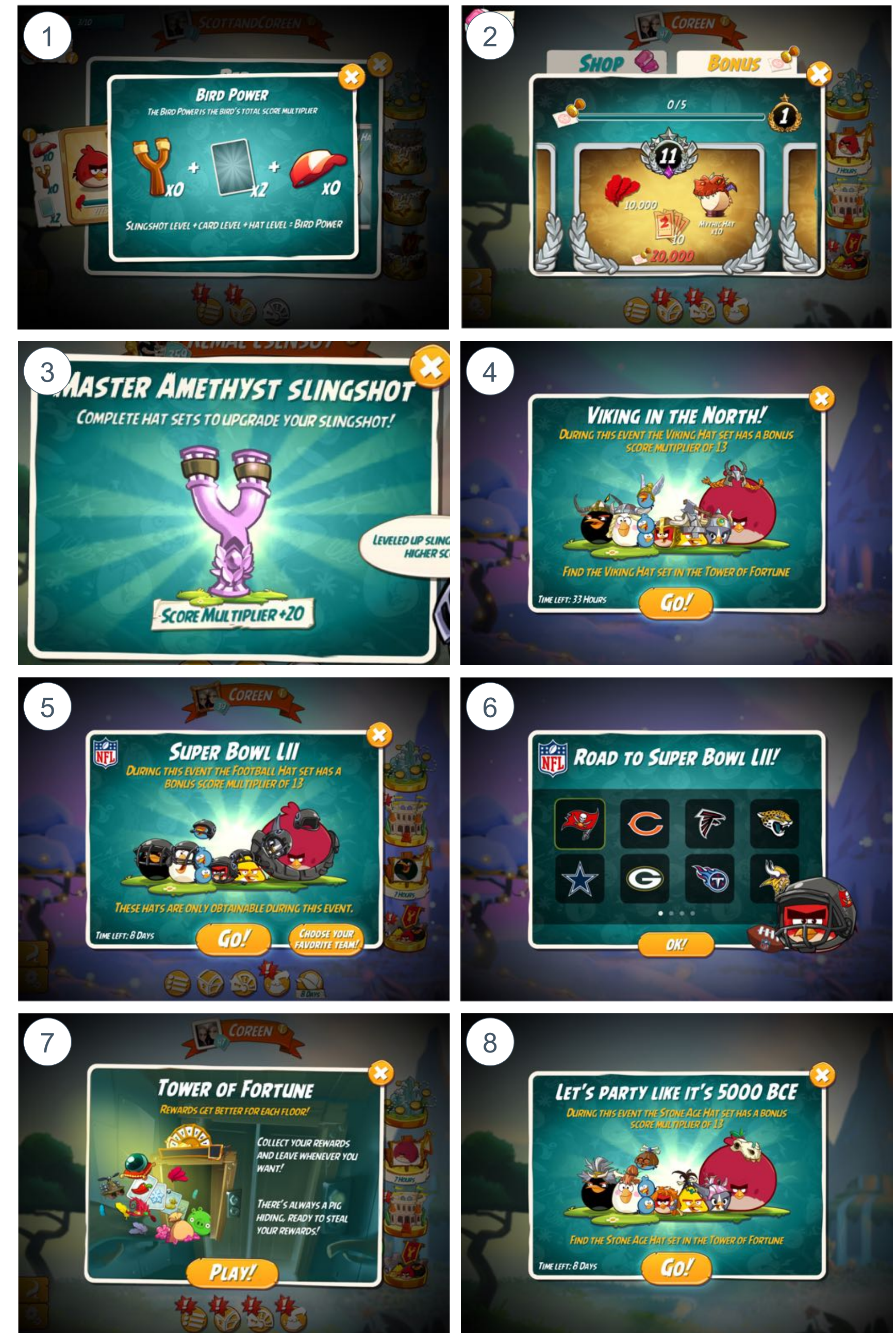
- Release and DB Library:
 - 12/22/17 [Viking in the North](#)
 - 1/24/18 [Super Bowl Hats](#)
 - 2/21/18 [Stone Age Hats](#)
- KPI: Revenue, Retention
- Player motivations: Ownership, Value

Related Features

- Fishdom [Collection](#)
- Dragon Ball Z [Collection Choose Award](#)
- House of Fun [HOF Legends](#)

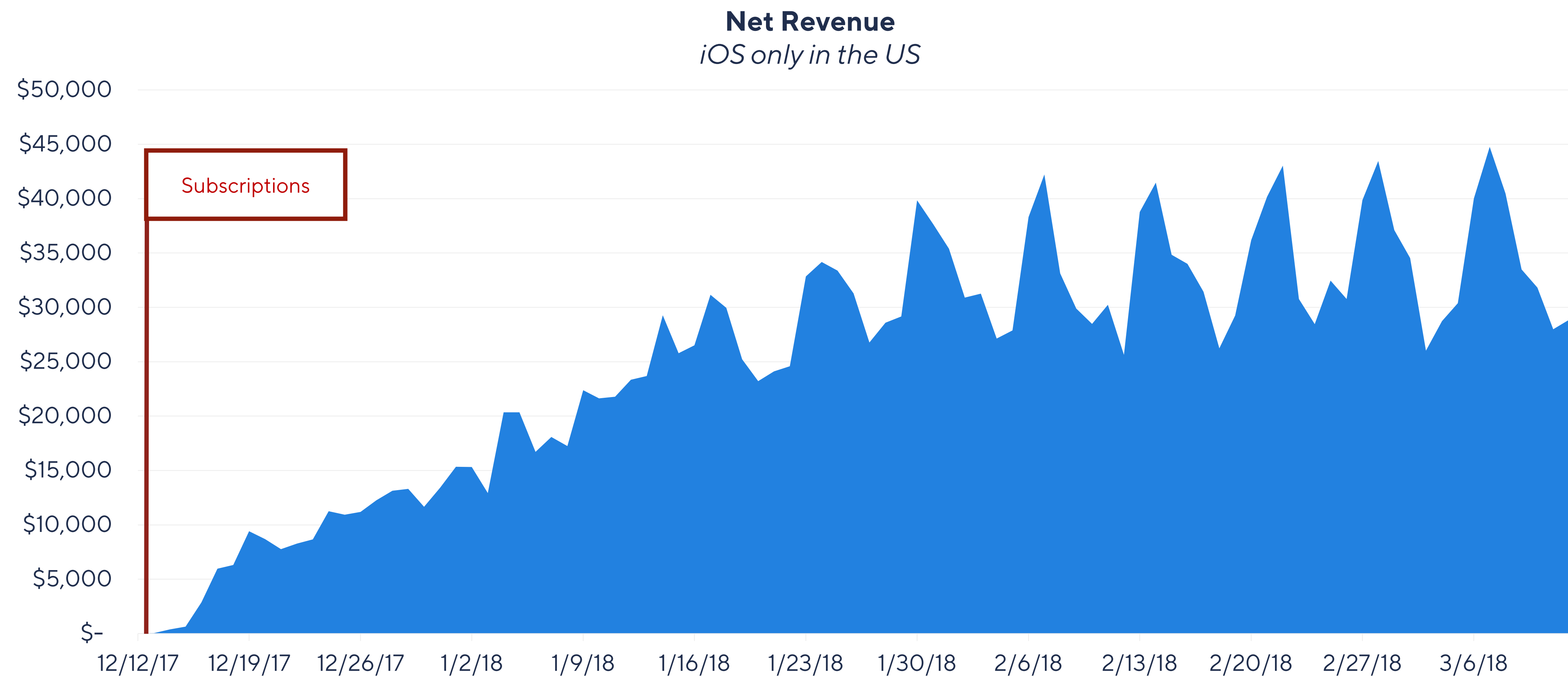
Key Takeaways

- Deeply *integrate* collection systems in multiple mechanics to generate sustainable value and make collections more meaningful to players (both emotionally and practically)
- Attach collections to purchases (although not utilized in AB2) ... bonus items after purchase creates a *very rewarding feel* to the purchase experience (Playtika uses this as a key to monetization in Casino ... see [Prize Master](#) as an excellent event-based implementation of post-purchase offerings)
- Make purchases necessary to complete *some* collection sets (for example, in [HoF Legends](#) collection system, \$167 in spend was necessary to level up only 1 of the characters to the highest tier)



SUBSCRIPTIONS

Color by Number: Coloring Book revenue continues to grow while Downloads have fallen dramatically from their December peak



Revenue data comes from Sensor Tower

SUBSCRIPTIONS

Color by Number: Coloring Book markets a 3-day trial and, subscriptions are their only revenue-generating feature

Feature Explanation

- A free 3-day trial is offered upon app-entry. Users may start the trial or close the dialogue to use free content (1)
- Clicking ‘More info’ goes over the auto-renewing subscriptions (2)
- Attempting to open locked content will open a subscription dialogue (3 & 4)
- Choosing the free trial opens the purchase screen; \$7.99 *per week* starting at the end of the trial (5)

Additional Information

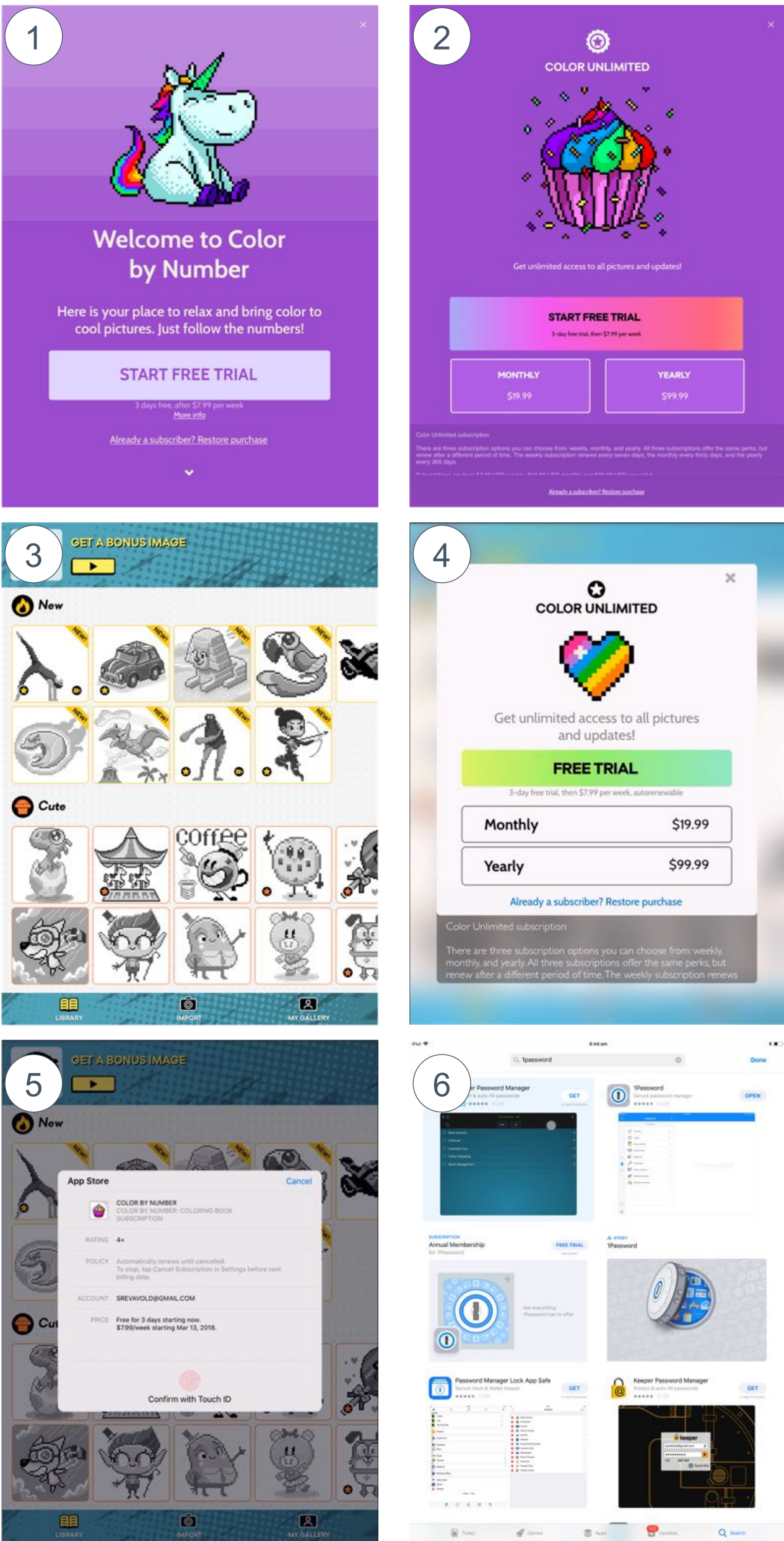
- DB Library: [Subscriptions](#)
- Release: 11/27/17 (release date of app)
- KPI: Revenue

Related Features

- Legendary Game of Heroes [VIP Subscription](#)
- Best Fiends [VIP Subscription](#)
- Ellen’s Road to Riches [Piggy Bank Subscription](#)

Key Takeaways

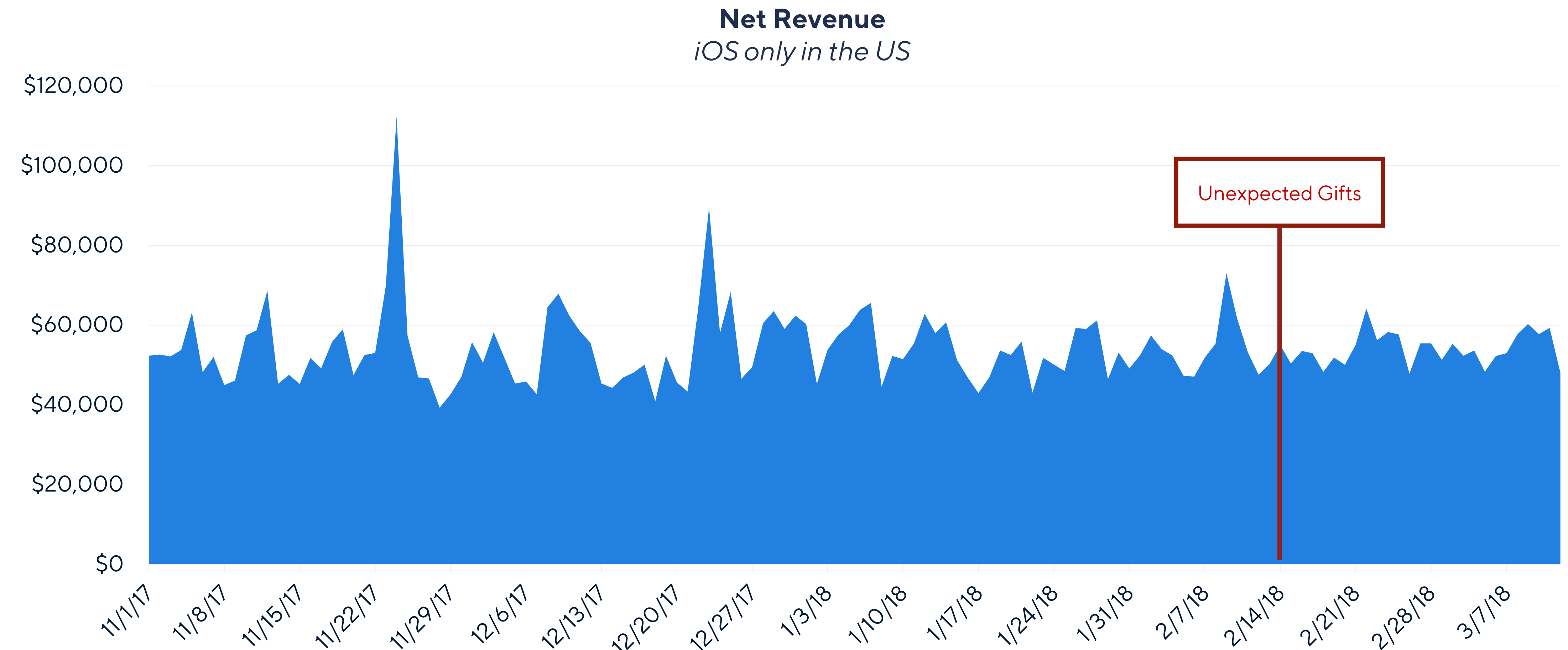
- Only 2 of the top 23 grossing Puzzle apps utilize subscriptions (LGoH and Best Fiends). As a test, consider implementing a VIP for a Month package, which is like a short-term subscription and will drive both revenue *and* retention (see Huuuge Casino’s [VIP Subscription Offers](#) for a strong implementation)
- The revenue growth of this app (and several other color by number-like apps) demonstrates player willingness to pay good money for subscriptions. In the base subscription in *Color by Number*, players are spending ~\$32/month on weekly subscriptions
- Discount the annual subscription aggressively: the annual subscription is \$99.99 and the weekly subscription adds up to \$416 per year
- Reach out to Apple about a subscription store card. Check out 1Password as an example: in the store, there is a 1Password download card *and* a 1Password annual subscription card. This blocks competitor cards from showing up when players search for your app (image 6)



NEW INNOVATIONS

PRESTIGING

This proven mechanic drives retention in Idle Games ... even though there is *no noticeable* revenue bump from this Seekers Notes release



Revenue data comes from Sensor Tower

PRESTIGING

Seekers Notes *Unexpected Gifts* is an event-based collection that awards a daily amount ... and is upgradable with event currency

Feature Explanation

- The *Red Envelopes* (event currency earned during play) may be exchanged for items or used to upgrade the *Guardian* level (1 & 2)
- Each level upgrade of the *Guardian* increases the amount of daily awards given out by the *Guardian*. Players have the option to choose from 3 possible rewards: *energy*, *coins*, or *weapons* (3)
- At the end of the event, unused event currency will be displayed in a special section of the store (4)

Additional Information

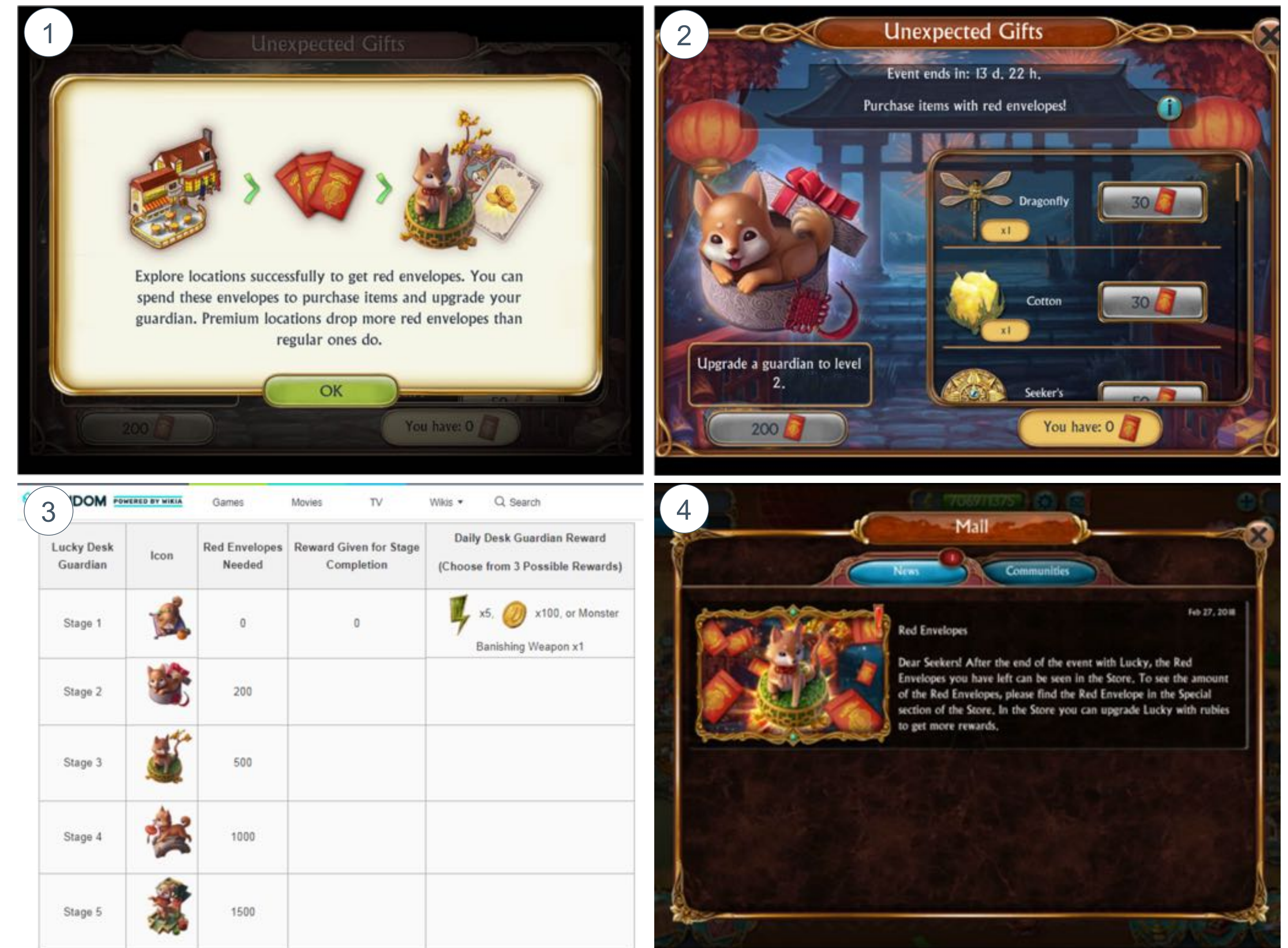
- DB Library: [Unexpected Gifts](#)
- Release: 2/14/18
- KPI: Retention
- Player motivations: Ownership, Value

Related Features

- Dragon Ball Z [Super Power Up](#)
- Candy Crush Jelly [Streak Revive](#)
- Seekers Notes [Guardian of Time](#)

Key Takeaways

- Consider adding *very impactful* decision points—e.g., choose to level up the bonus system or purchase other items—in more harder-core Puzzle apps (or when targeting your hard-core, *value-focused* players)
- This type of feature (with an upgrade or not option), is a simplified version of an important retention mechanic in Idle Games. In Idle Games, players can 'Prestige' (or 'New Game+') their entire experience or continue to purchase items in their current experience (see, "Prestiging" at 21:21 in this presentation, "[Idle Games: Mechanics and Monetization of Self-Playing Games](#)" for more details)



LEVEL DESIGNS

LEVEL DESIGNS

Ice Bombs in Homescapes:

- Destroy *Ice Bombs* with boosts before the timers reach zero, preventing an explosion of ice block hazards (1 & 2)

Walnuts in Homescapes:

- Activating boosts are the only way to remove *Walnuts*, or *Shelled Walnuts*, which contain an additional layer (3 & 4)

Surprise Box in Homescapes:

- Making matches or boosts next to a *Surprise Box* will open them, adding boosts or hazards to the board. *Ribbon*, or *ribbon* and *bow*, are additional layers requiring multiple matches or boosts to open (5 & 6)

Sledgehammer in Homescapes:

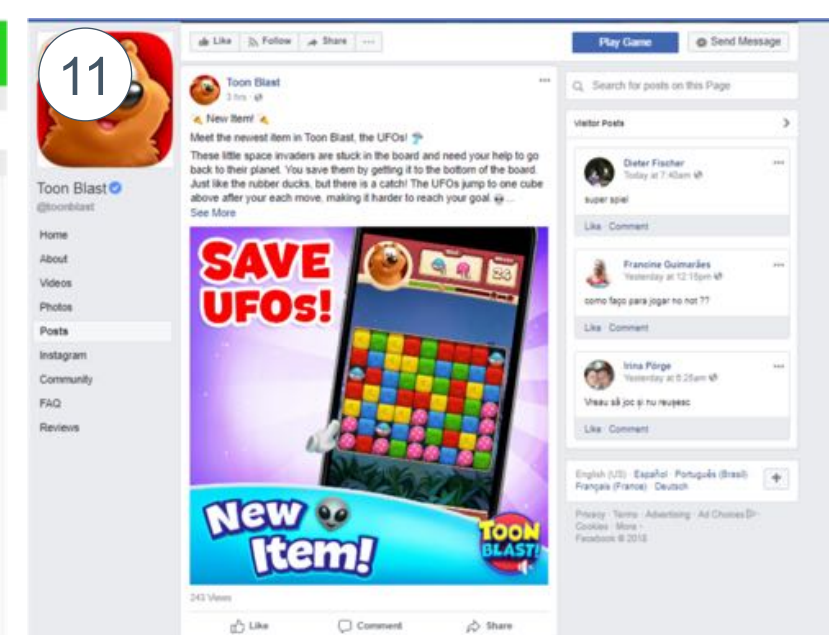
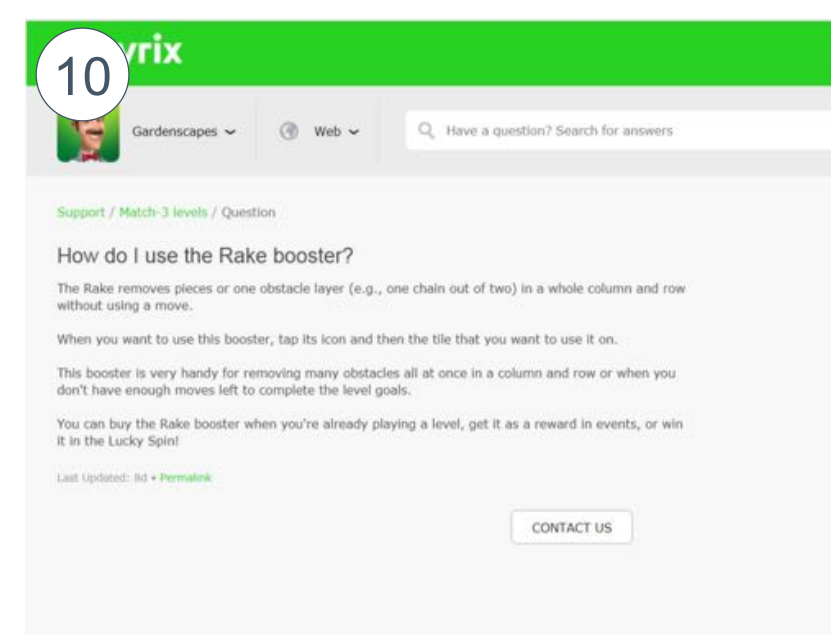
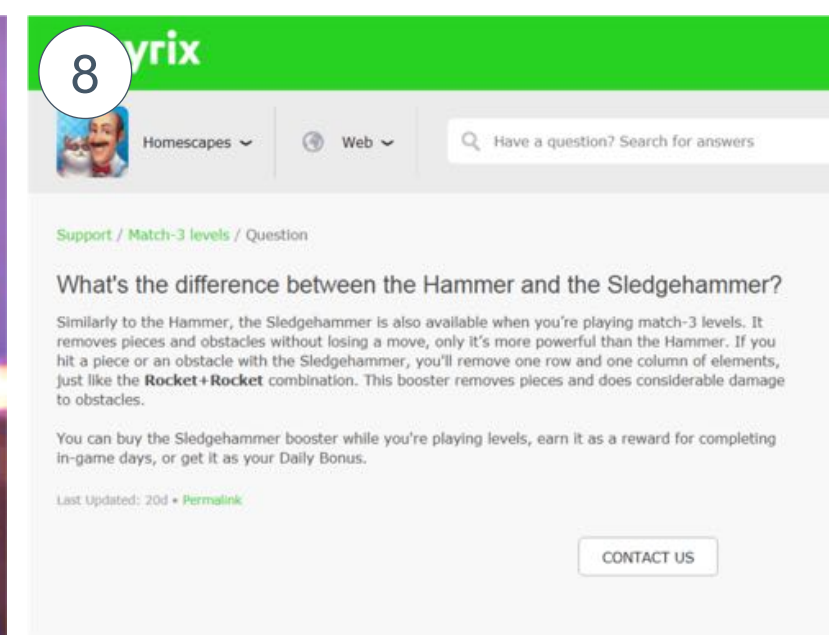
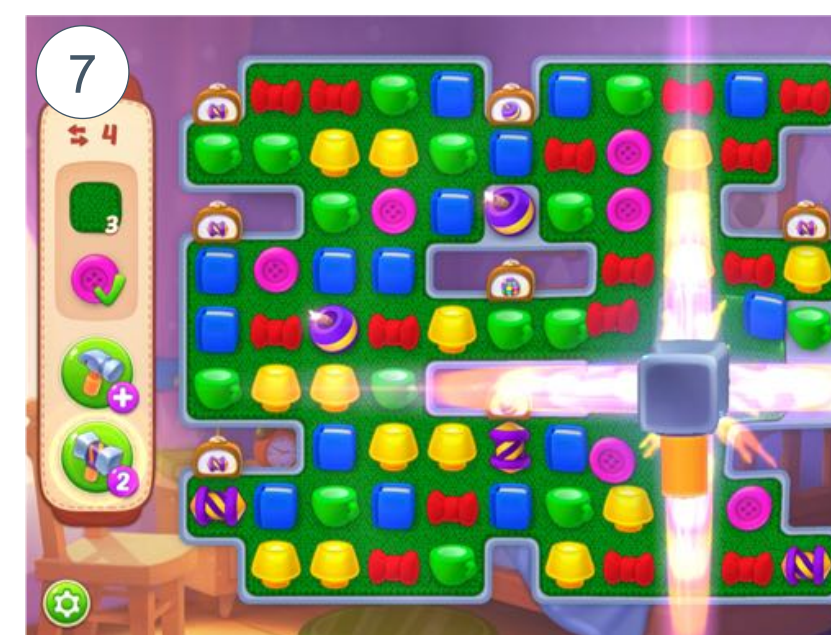
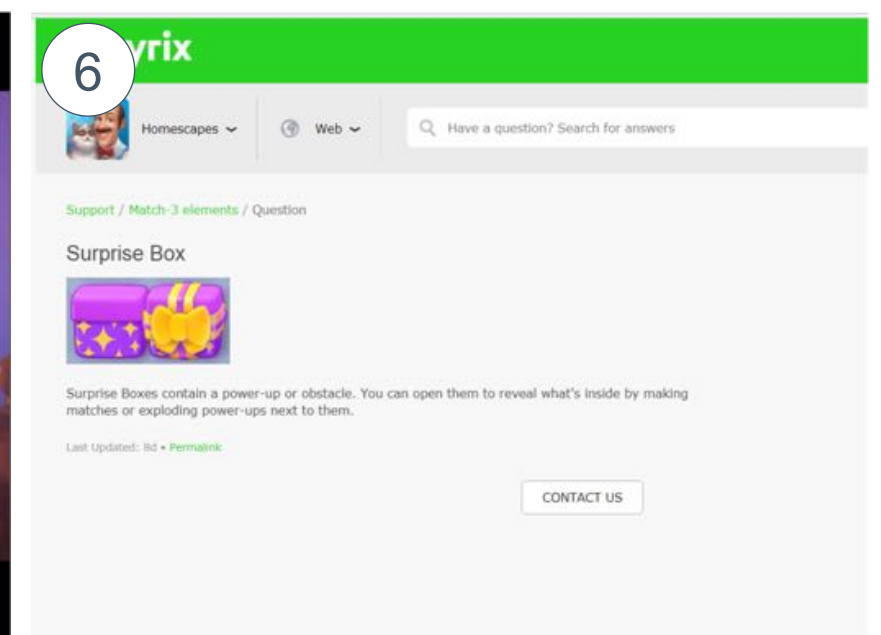
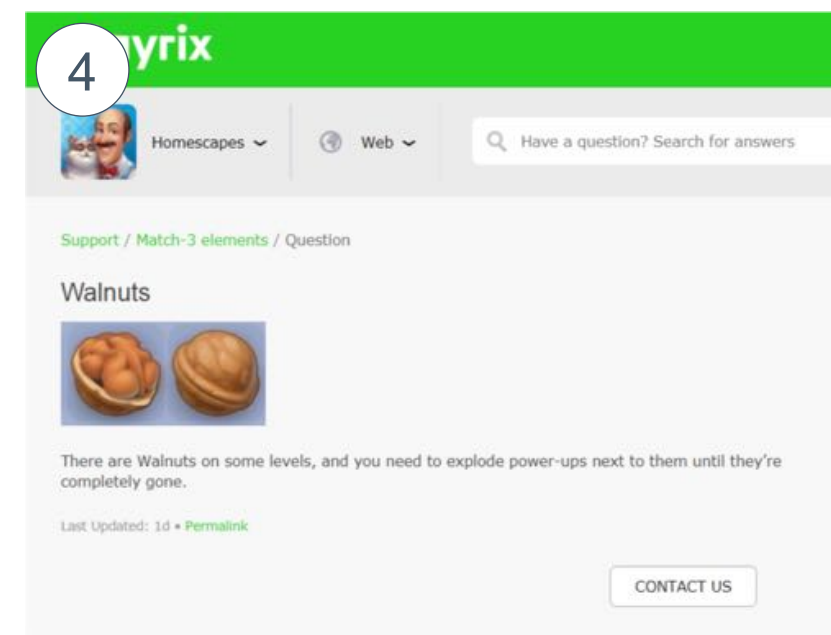
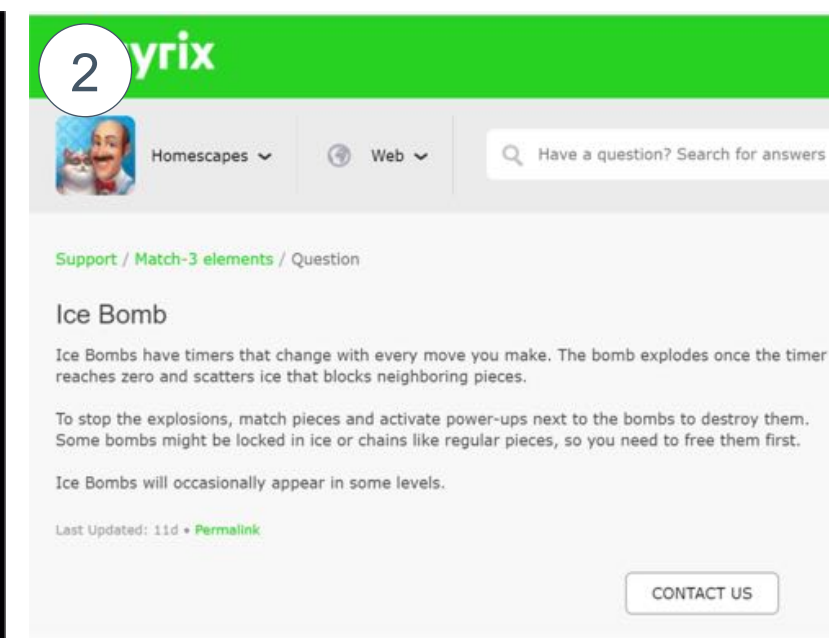
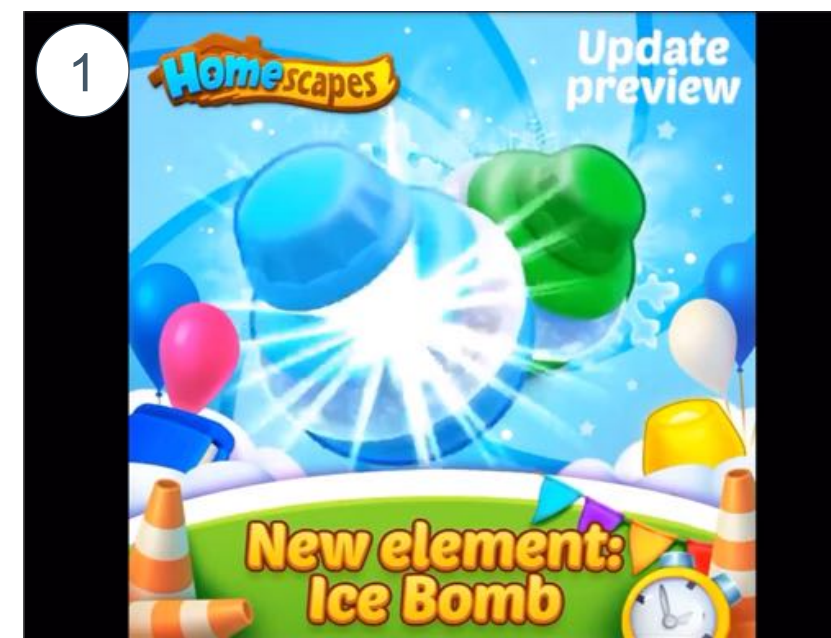
- Using the *Sledgehammer* boost removes one row and column of pieces without taking a move away. All players receive 3 free *Sledgehammers* and may acquire more as rewards or through purchases (7 & 8)

Rakes in Gardenscapes:

- Rakes are the same as *Sledgehammers* (9 & 10)

UFO in Toon Blast:

- The *UFO* element will appear on levels as a collection goal. *UFOs* will move up one cube each move and must be dropped to the bottom of the board to collect (11 & 12)



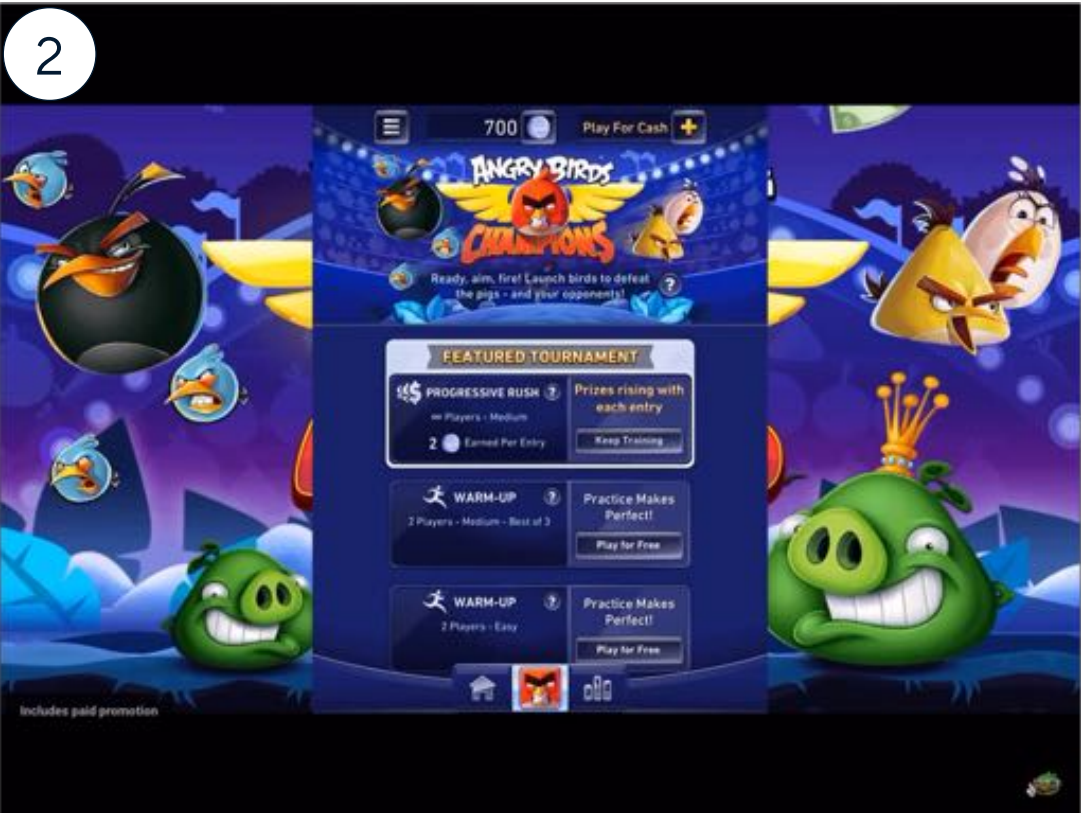
MARKET WATCH

2/1/18 - 2/28/18

NOTABLE FEATURES I

Chests were utilized in a variety of apps. Angry Birds 2 released cash tournaments. Leagues appear to be coming soon in Homescapes

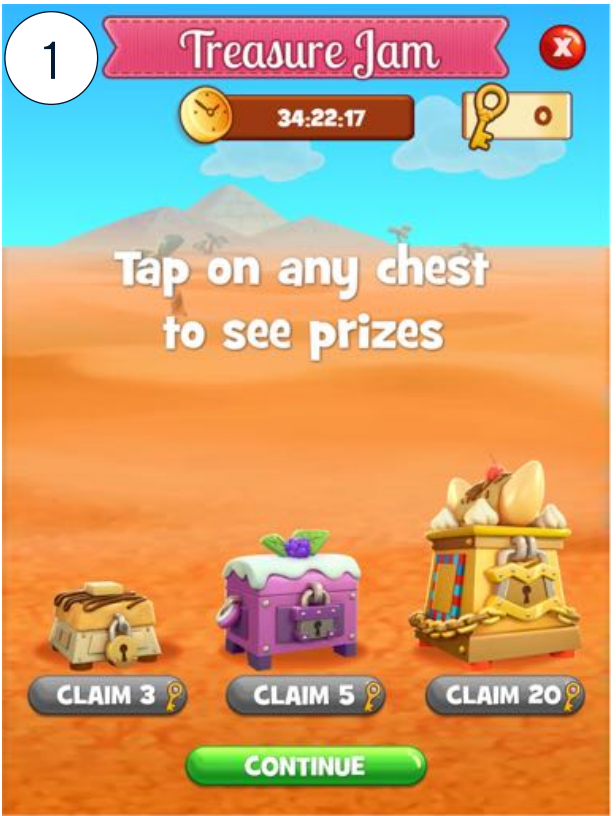
App	Notable Release	More Information
Candy Crush	Candy Pet Didi	<ul style="list-style-type: none">Play to collect event with retention mechanic; fill meter to collect prize chest (1)
Angry Birds 2	World Winner	<ul style="list-style-type: none">Partnership with real money app gives players the option to compete for real money (2)
Homescapes	Flying High	<ul style="list-style-type: none">New second event added that is similar to Gardenscapes' league event Electric Show (leagues potentially coming soon)
Gardenscapes	Chest Levels	<ul style="list-style-type: none">Community page has informative video explaining a feature unlocked by reaching the end of levels (although not new, this feature was not previously marketed)
Legendary Game of Heroes	Valentine's Day	<ul style="list-style-type: none">Play to collect gifting event with event collection earned ONLY by receiving gifts from Guildmates (3)



NOTABLE FEATURES II

App	Notable Release	More Information
Cookie Jam	Treasure Jam	<ul style="list-style-type: none">Play to collect event with key currency. Keys open 3 different chest types (1)
Matchington Mansion	Language Setting	<ul style="list-style-type: none">Additional option added to the settings menu allowing players to select language (2)
Seekers Notes	Art Animation	<ul style="list-style-type: none">Additional animation added to app characters appearing in game dialogues (3)
Toon Blast	UFO	<ul style="list-style-type: none">New level design item for collection goal to pass level
	Team Chest	<ul style="list-style-type: none">Team event to collect stars and open chest for rewards

[Click here](#) to go online for the full list of content released this month ... with links to more images in the [Feature Database](#)



APPENDIX

PLAYER MOTIVATIONS



Understand emotional motivations to generate growth. The most impactful features are those that trigger strong, positive, emotional responses

“Most companies segment their markets by customer demographics or product characteristics and differentiate their offerings by adding features and functions. But the consumer has a different view of the marketplace. She simply has a job to be done and is seeking to 'hire' the best product or service to do it. Jobs aren't just about function—they have powerful social and emotional dimensions.” - Clayton Christensen, co-author of the [Jobs to be Done framework](#)

To create new innovations, focus on the emotional jobs that people want accomplish. This is very applicable to our industry, where there is little *practicality* about playing a non-paying casino game. Therefore, we have to know the emotional drivers of our players.

Liquid and Grit has formulated key player motivations. This is, and likely always will be, a work in progress. So please feel free to email me at brett.nowak@liquidandgrit.com for suggestions or comments.

Player Emotional Motivations

- **Achieve** - Players who want to accomplish a goal
- **Thrill** - Players who want the excitement and stress of taking a risk
- **Surprise** - Players who want to uncover an unknown, see new opportunities, and try new things
- **Awe** - Players who want to experience quality production value
- **Flow** - Players who want to get into the zone and escape
- **Relationship** - Players who want to connect with other people
- **Association** - Players who want to identify with something for familiarity and comfort
- **Ownership** - Players who want to have things belong to them
- **Create** - Players who want to be creative and produce something

DATA COLLECTION PROCESS



Recommendations, information, and data comes from market research, app intelligence tools, and deep analyses of the apps

Market Research

- Each app is reviewed daily for updates, regardless of whether the app has been updated through the App Store
- Transaction information comes from the iOS App Store's In-App Purchases tab. These transactions are ranked based on the number of transactions
- Trending revenue, downloads, and package-rank data come from Sensor Tower Store Intelligence

Game Information

- App information comes from a deep-dive analysis of each app
- In the Economy Analysis and economy-related slides, the currency value is determined by converting currencies into money using \$5 worth of non-sale purchasable currencies in each app
- For example, if an item costs 1,000 of the primary currency and players can purchase 500 for \$5, the value of the item is \$10. For apps without a \$5 package, the next closest package is used

*“We keep moving forward, opening new doors, and doing new things,
because we're curious and curiosity keeps leading us down new paths.”*

– Walt Disney

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