



Puzzle Report

Competitive Research and Actionable Product Recommendations

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JULY

2019

REVENUE DRIVERS



PUZZLE > EVENTS > CHALLENGES >

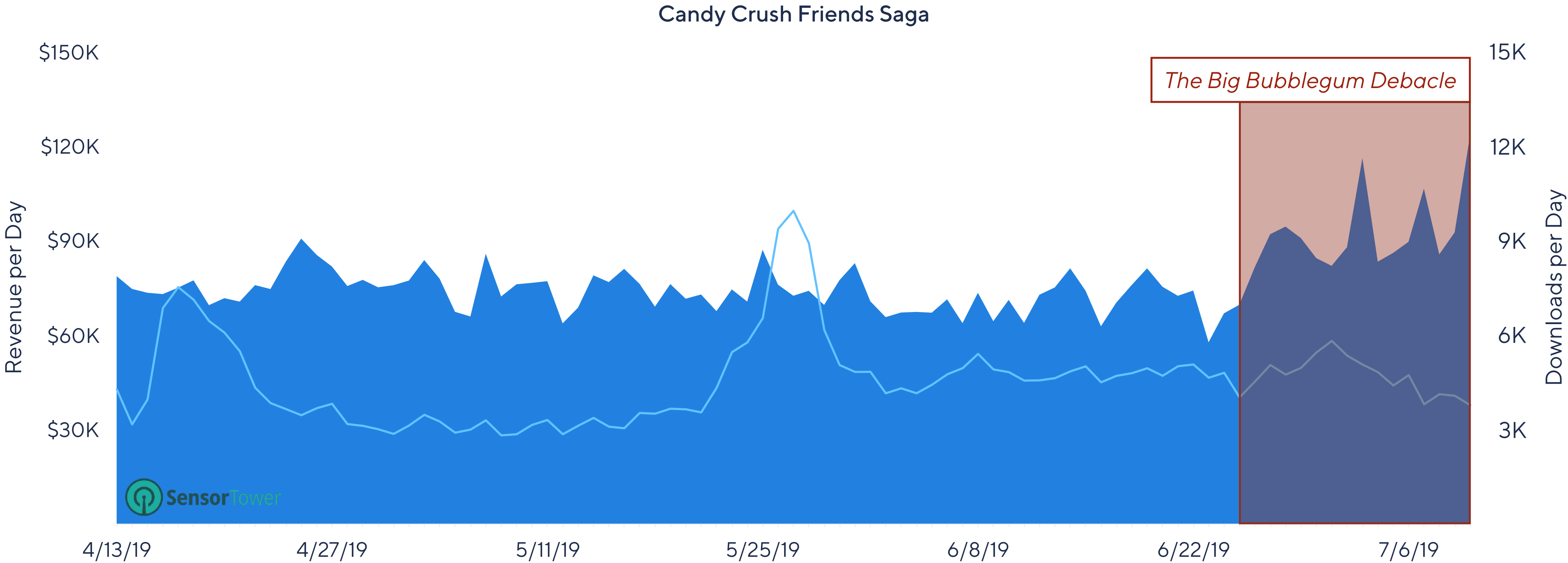
FREE EVENT LEVELS

The Big Bubblegum Debacle in Candy Crush Friends Saga

REVENUE ANALYSIS

Candy Crush Friends Saga revenue increased +23% WoW and +26% 2Wo2W after the release of *The Big Bubblegum Debacle*. A *Limited Offer* sale was also released during that time period, contributing to the revenue growth. Downloads were up +8% WoW and +1% 2Wo2W.

Releases
6/27 - 7/3: Limited Offer
6/27 - 7/10: The Big Bubblegum Debacle
6/27 - 7/10: Bubblegum Troll
6/28: \$9.99 <i>Small Sale Bundle</i> moved +3 spots to #8 top transactions
7/1: \$9.99 <i>Small Sale Bundle</i> moved +1 to #7



Graph data is iOS U.S. only
xWoW = X weeks over X weeks

FEATURE TEARDOWN

In this limited-time event, players have *one attempt* to complete *free* event levels that are placed throughout the main levels. To help players earn the event-specific *Character* and *Costume*, players are placed in teams that can award additional prizes.

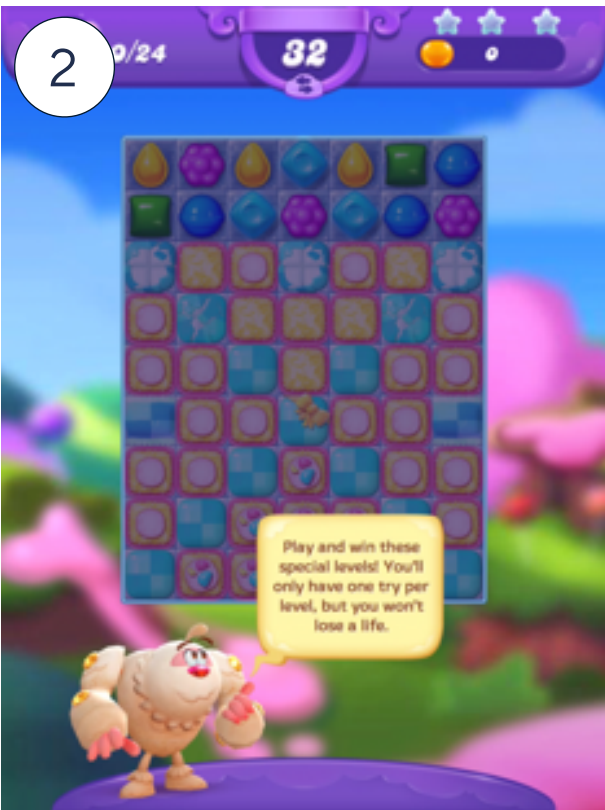
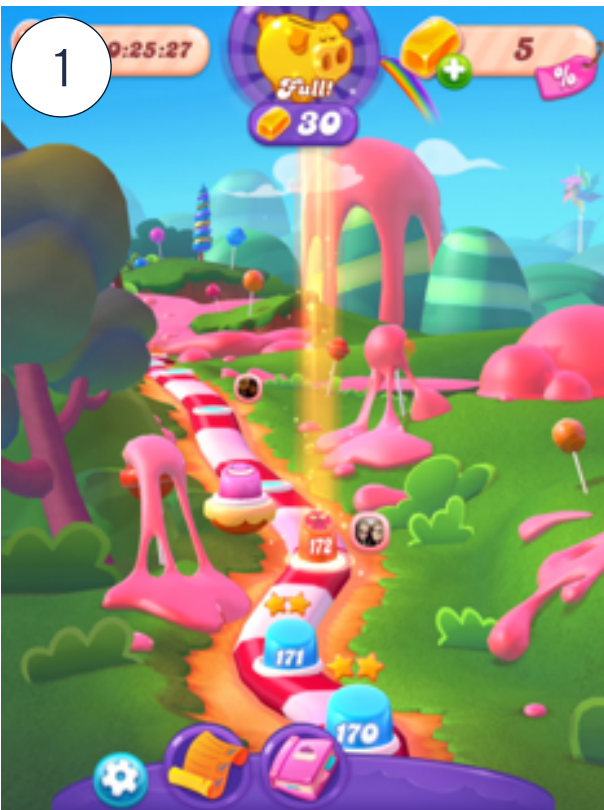
Feature Details

- Event levels (e-levels) are added intermittently next to the main levels (1).
- Players have 1 attempt to pass an e-level ... but e-levels are free to play (2).
- If players fail an e-level, they must progress in the main levels to reach another e-level.
- E-levels award points that unlock lives, boosts, and the event's *Character* and *Costume* (3).
- After completing the first e-level, players join a 5-player team (4).
- Team points are earned by logging in daily, and attempting and completing e-levels (5).
- The team and individual prizes award similar items (6).



Explore More Online

Find tons of screenshots and videos of important flows in the [The Big Bubblegum Debacle](#) Library



IMPLEMENTATION INSIGHTS

Balance the amount of free e-level play with the consequences of failure to increase both adoption *and* spend. Design individual and team awards to make *all players* feel like a group and *whales* feel fairly rewarded.

Product Recommendations

- **Offer all or the first play free to increase the % of players engaged in the event.** In *The Big Bubblegum Debacle (TBBD)*, all e-levels are free. In Candy Crush Saga's [Beanstalk Challenge](#) (+23% WoW in revenue post-release), players are awarded a free play each day (image 1 and the [Mini-Game Events](#) Wiki).
- **Then, make the cost of failure as expensive as the amount of free play.** In *TBBD*, players are more willing to spend boosts to pass e-levels since there are no replays (a high cost of failure). In Caesars Slots' mini-game event [Thirst for Riches](#) (+13% WoW revenue post-release), only the first play was free but players could easily play again (a lower cost of failure) ([Mini-Game Events Engagement](#) Wiki).
- **Use engagement goals as an inexpensive way to ensure that teams are filled with engaged players.** In *TBBD*, players must complete an e-level before joining a team. In Homescapes' [Flying High](#), players must collect 2 level items to qualify for leagues (image 2).
- **Release both individual and team awards to incentivize strong play from whales.** In Slotomania's [SlotoClans](#) (+32% WoW revenue post-release), team members can earn better individual awards after the team goal is met (image 3 and [Club Features](#) Wiki).

Player Insights

- **Avoid making team events too competitive.** Games are therapeutic for *Escapist Emily* player types, who have high monetization potential. These players often use games to avoid negative feelings and worries of everyday life. So while they enjoy social interactions and participating in teams and groups ... they do not like leaderboards or tournaments.



All Report Content is Now Online

Easily find previously-released Revenue Drivers and New Innovations in our Feature Database's new [Wiki Tool](#)



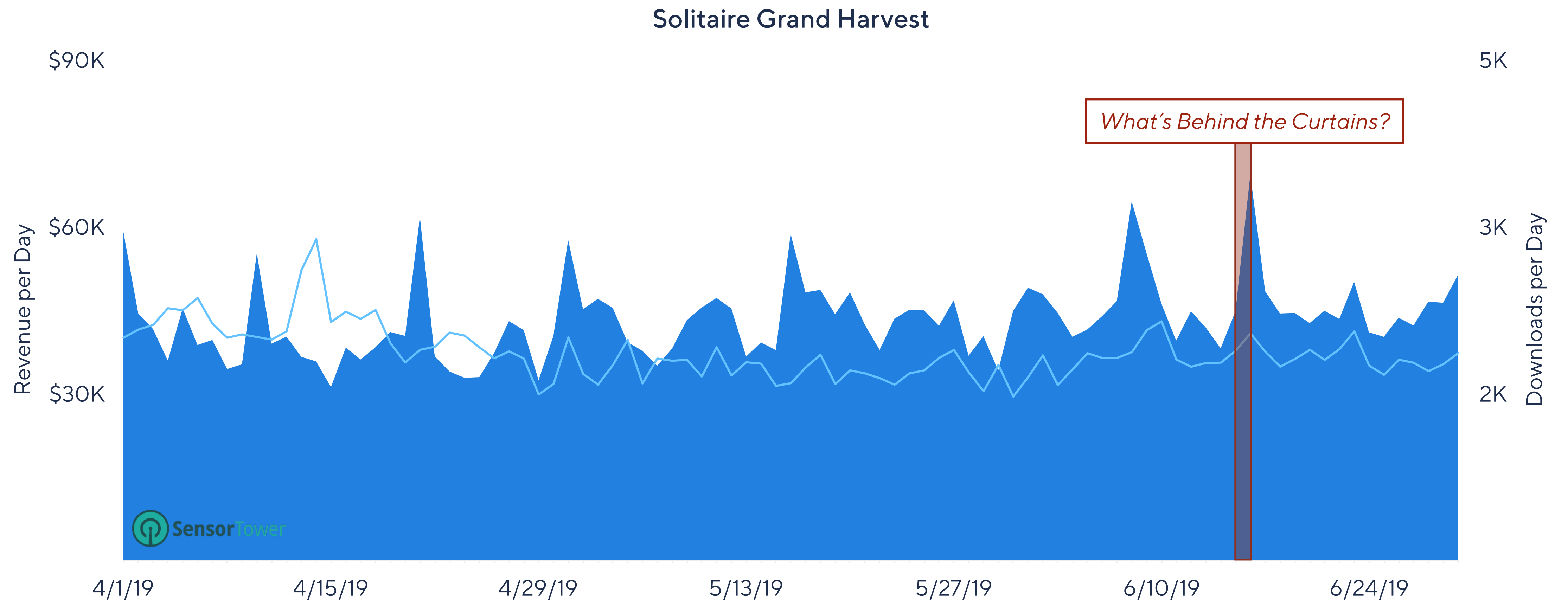
PUZZLE > EVENTS > PURCHASES >

SALES WITH ENGAGEMENT PACKAGES

What's Behind the Curtains? in Solitaire Grand Harvest

REVENUE ANALYSIS

Revenue in Solitaire Grand Harvest spiked +24% 3Do3D during the *What's Behind the Curtains?* Event. Downloads remained relatively flat.



Graph data is iOS U.S. only
xDoxD = x days over x days

FEATURE TEARDOWN

After purchasing the *What's Behind the Curtains?* package, players receive a daily *Surprise Bonus* for the next three days.

Feature Details

- Players that make a purchase are awarded a daily *Surprise Bonus* for 3 days (1).
- Players must log in each day to receive the prize.
- A missions leveling event, [The Power Up Plant](#), was released at the same time (2).



Explore Feature Families Online

Find more [Purchase Events](#) in the Library Tool within the [Puzzle](#), [Casino](#), and now [RPG](#) genres



IMPLEMENTATION INSIGHTS

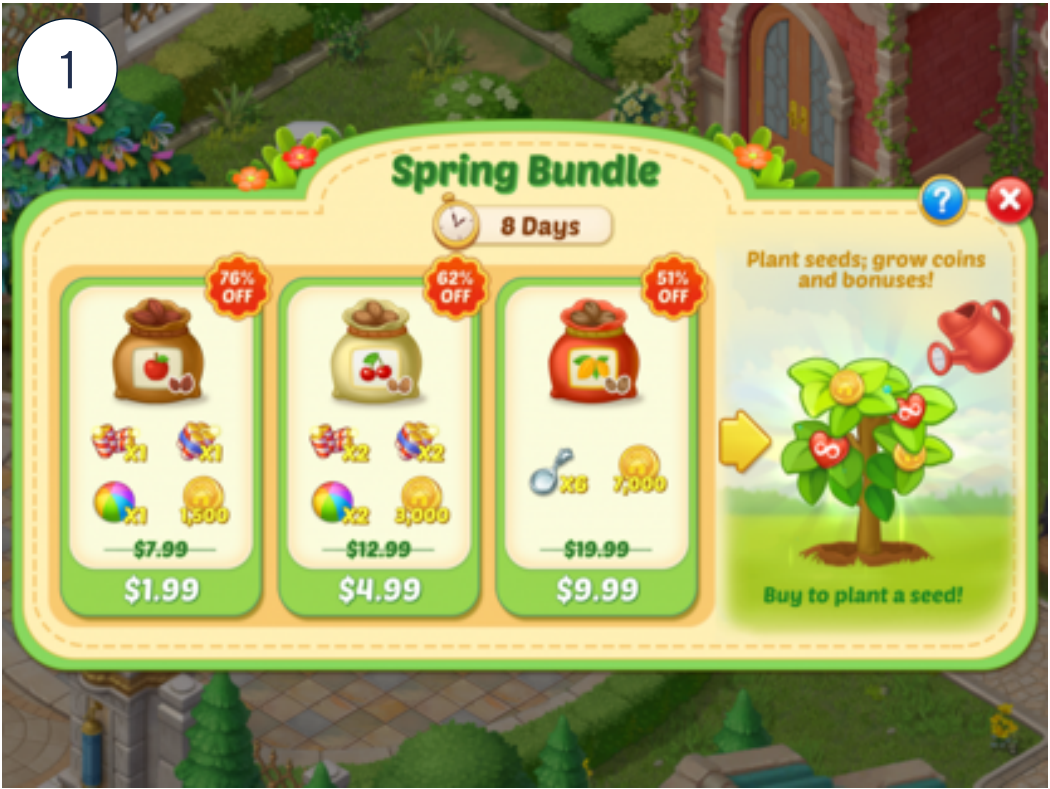
Revenue PMs should review sales that unlock additional value (particularly in Casino apps). This mechanic is now surfacing in Puzzle and driving results with opportunity for growth. For additional revenue events, consider post-purchase mini-games that are familiar to Puzzle players.

Product Recommendations

- [Sales that unlock additional value with engagement is an upcoming revenue driver in Puzzle](#). In addition to the spike in Solitaire Grand Harvest, Matching Mansion saw a +5% WoW increase in revenue and stronger transactions after the release of [Spring Bundle](#). This sale unlocked value after players completed levels (image 1 and [Engagement Bonus Bundles](#) Wiki).
- [These type of sales are more widely implemented in top Casino apps](#). In House of Fun's [Day's of Fun](#) event, players spin a wheel to determine the number of days they will receive a reward post-purchase (images 2 and 3).
- [Consider post-purchase mini-games with sales ... a proven revenue mechanic in Casino](#). POP! Slots is one of the best at utilizing these post-purchase mechanics ... with [Cash Wheels](#), [Hi-Lo Games](#), and [Scratcher Cards](#). After releasing a new machine with a post-purchase wheel, revenue was up +25% WoW (see the [April 2018 Casino Report](#) or [email me](#) for a copy if you do not have a Casino subscription).
- [Consider games more familiar to Puzzle players, like hidden objects](#). In Seekers Notes, revenue increased +10% WoW with the [Happy Easter Sale](#). In this sale, players found hidden energy in the sale dialogue (see this [video](#) and the [Hidden Object Dialogues](#) Wiki).

Player Insights

- [Mini-games target Gamer Gary player types ... is the largest and most likely to monetize group of players](#). These player types play games to become immersed within game worlds.



L&G > WIKI TOOL

All Report Content is Now Online

Easily find *previously-released* Revenue Drivers and New Innovations in our Feature Database's new [Wiki Tool](#)

BREAKOUT APPS



PROPERTY BROTHERS HOME DESIGN (STORM8)

Launch Information

- Launched 6/19/19 in the U.S.
- \$18K daily avg. revenue on iOS in the U.S.
- 7.3K daily avg. downloads
- Revenue is trending upwards

APP DECONSTRUCT

This app is an IP-themed, near reskin of Home Design Makeover ... Storm8's other top grossing Puzzle app. In both apps, there are no retention bonuses and infrequent sales. During Time-Based Challenges, players *must complete* the expansion area to keep them. During level play, a meter fills with every activated boost ... and eventually awards an additional boost.

Notable Features

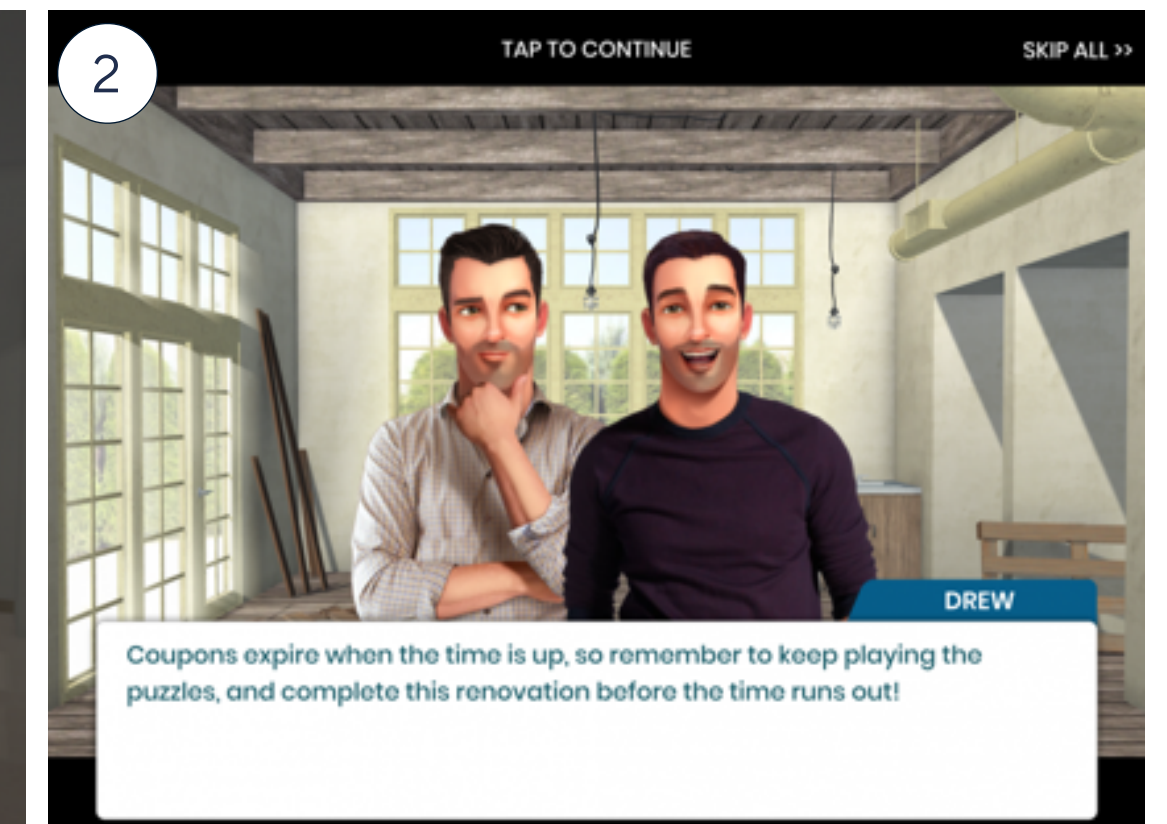
- **Retention Bonuses:** There are *no* retention bonuses and players can *only* acquire boosts by spending currency (1).
- **Limited Time Challenges:** The goal is to decorate a new expansion area.
 - Players must complete the area within the time limit to keep it (2).
 - Completing challenges award coins, 1 hour of unlimited lives, and the area.
 - This is similar to Matchington Mansion's [Snowy Cabin](#) and Gardenscapes' [Attic](#).
- **Level Play Boost Meters:** Players trigger boosts to fill a meter.
 - Filling the meter charges a *Firework*.
 - Once charged, players activate the *Firework* and select a colored tile to be cleared from the board (3).
- **Sales:** Sales are rarely launched in Property Brothers Home Design and Home Design Makeover (4).



> LIBRARY TOOL

Explore More Online

Use the [Library Tool](#) to efficiently see all the features in this app



IN SOFT LAUNCH



WILD THINGS: ANIMAL ADVENTURES (JAM CITY)

Launch Information

- Soft launched 1/21/19
- Released in Netherlands, Philippines, and New Zealand (as of 7/12/19)

APP TEARDOWN

Tamagotchi Pets is the core meta-feature that combines elements from Angry Birds 2's *Hatchlings* and Candy Crush Friends Saga's *Character Collection*. In Time-Based Challenges, players can decrease the cost of the reward by collecting level items. The level play is match-link, the progression is a task-based storyline, and the art style is 3D animation.

Notable Features

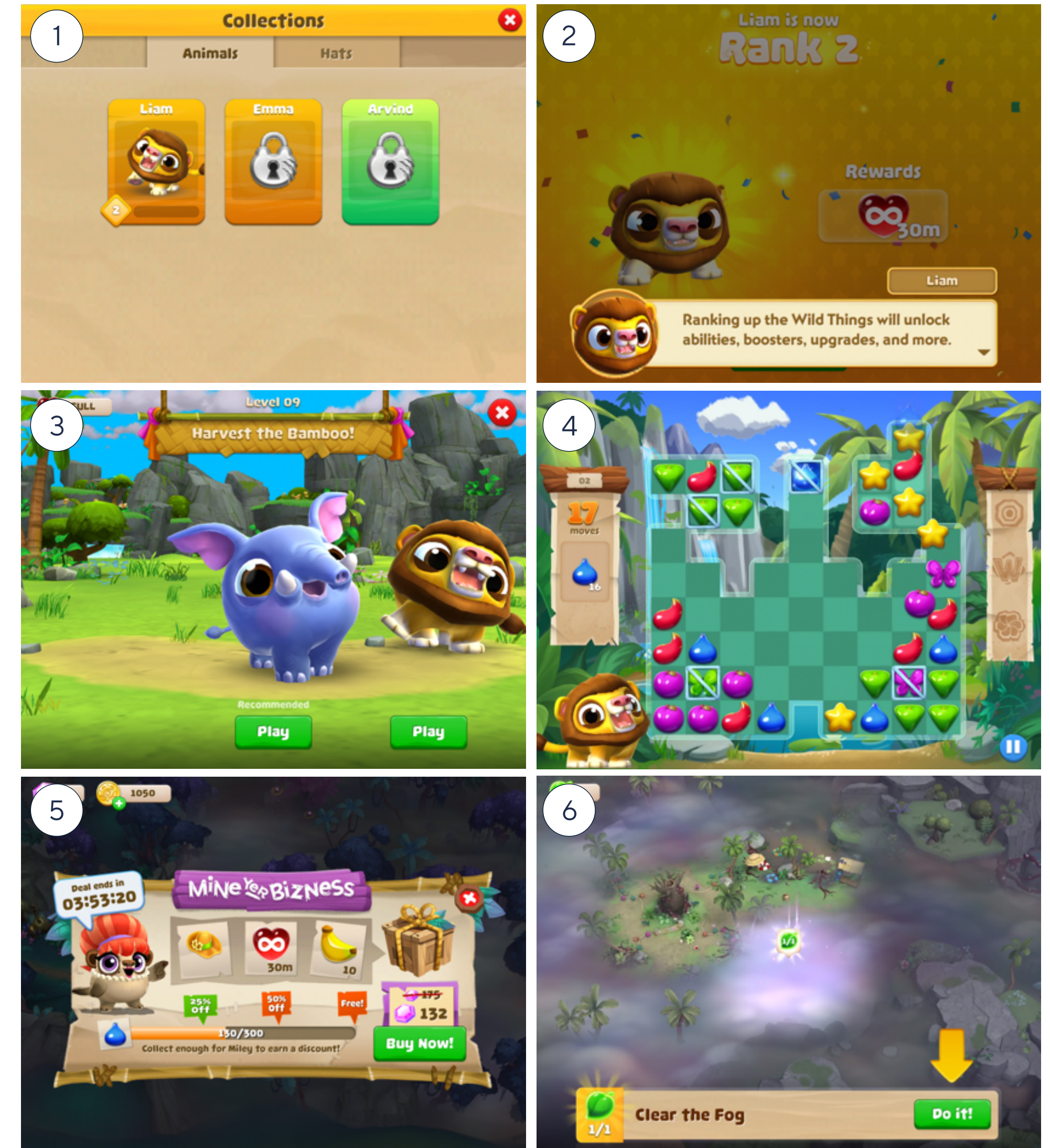
- [Tamagotchi Pets](#): As players progress, they unlock *Animals* (1).
 - Players care for the *Animals* to release their *Abilities* and *Ability-Upgrades* (2 and [video](#)).
 - Before playing a level, players select an *Animal* to utilize its *Abilities* (3).
- [Time-Based Challenges](#): Players can either spend *Gems* or collect enough *Blue Pieces* during level play to earn a reward (4).
 - As players collect *Blue Pieces*, the cost of *Gems* is discounted (5).
 - The reward is free if players collect enough *Blue Pieces*.
- [Progression](#): Playing levels completes tasks that unveils storylines and chapters (6).



LIBRARY TOOL

Explore More Online

Use the [Library Tool](#) to quickly understand this yet to be released app



LEVEL MECHANICS



NEW LEVEL DESIGN I

Hose in Gardenscapes

- Players make adjacent matches or use boosts to roll up a *Hose*.
- The *Hose* is removed once completely rolled up.

Rope Bridges in Gardenscapes

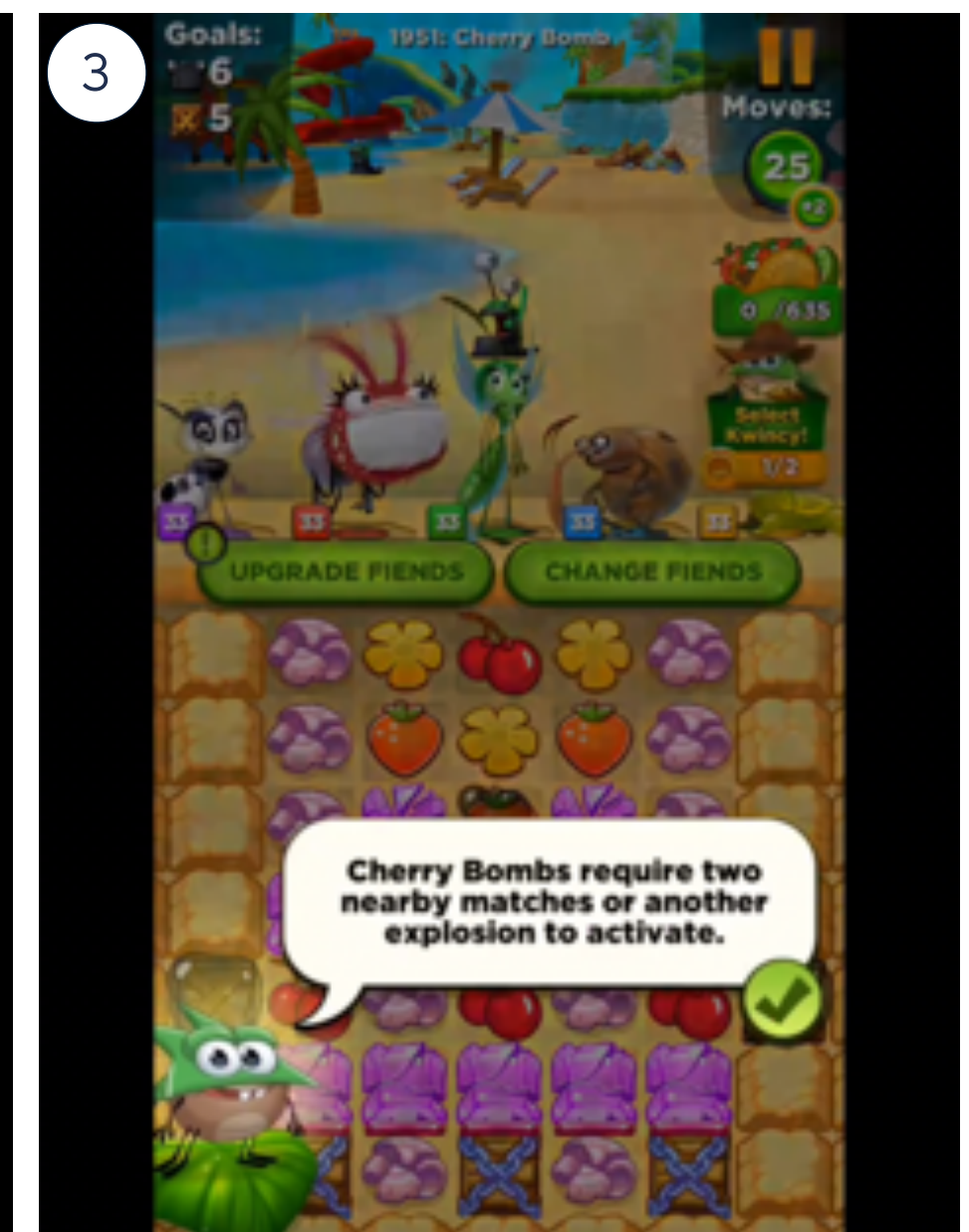
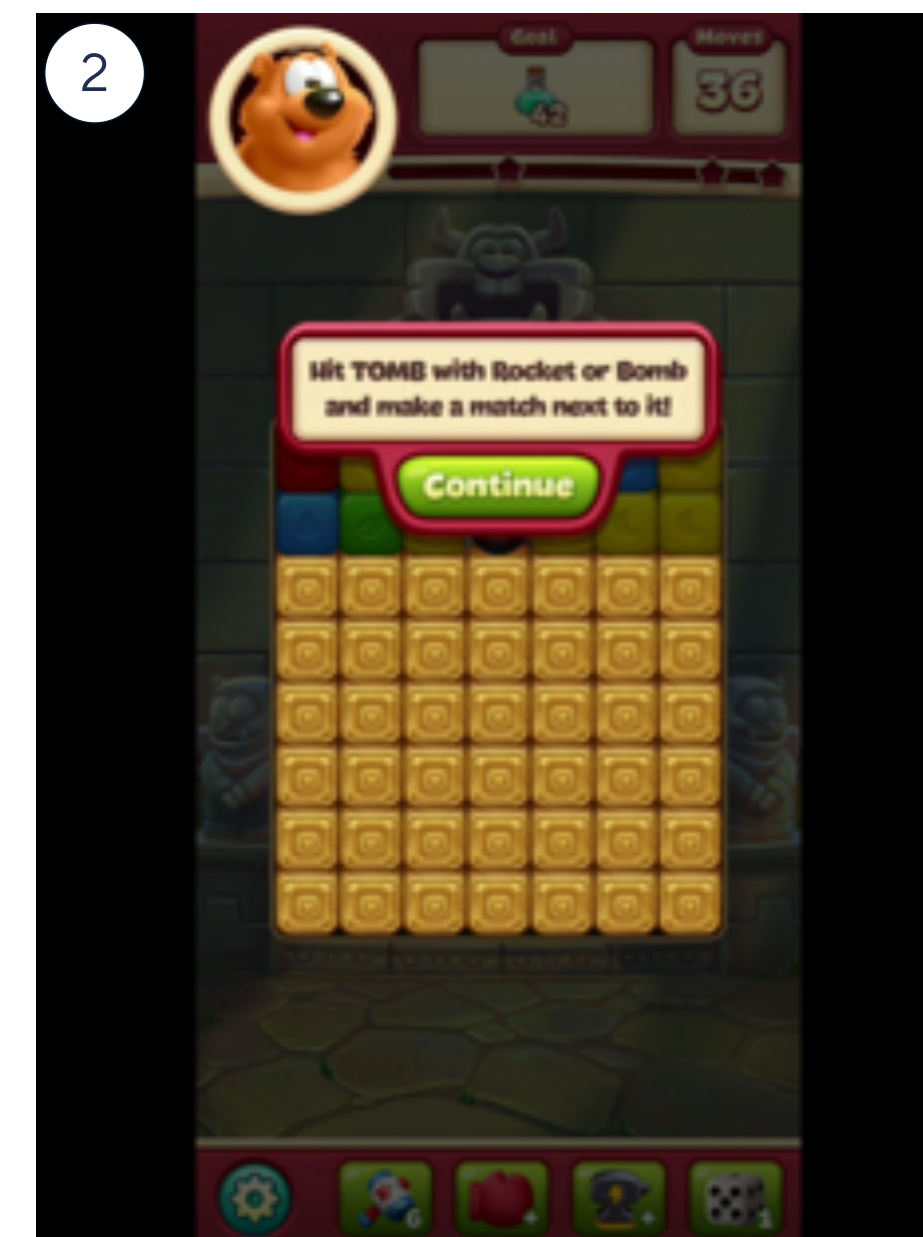
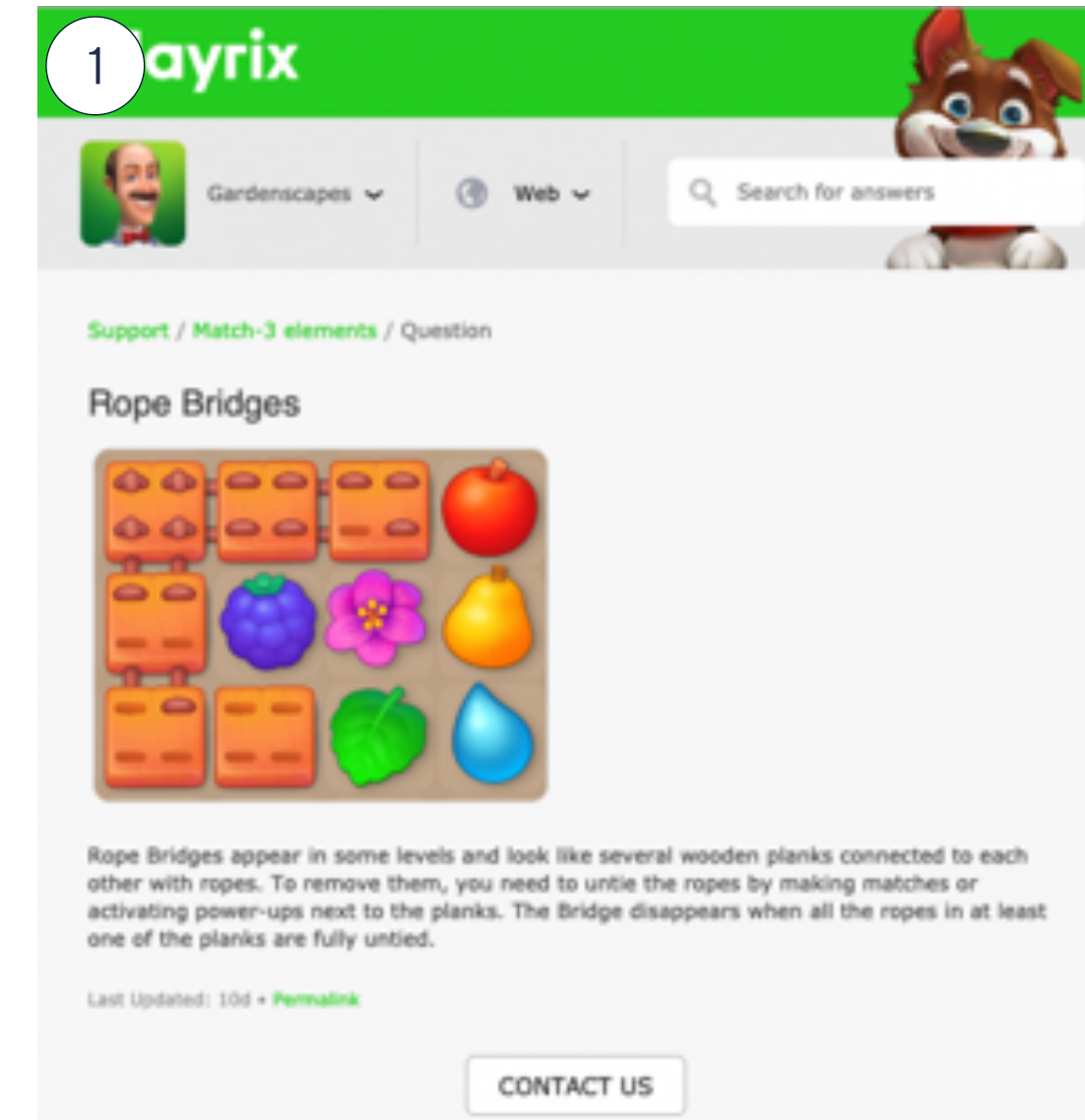
- *Rope Bridges* are made up of *Wood Planks* with 4 *Rope Knots*.
- Players make matches or activate boosts next to *Wood Planks* to untie the *Rope Knots*.
- Untying all *Rope Knots* in at least 1 of the *Planks* removes the *Rope Bridge* (1).

Tombs in Toon Blast

- Players activate boosts to damage *Tombs*.
- Once damaged, *Tombs* are removed by making an adjacent match or using a boost (2).

Cherry Bombs in Best Fiends

- *Cherry Bombs* activate with 2 adjacent matches or by hitting them with an *Explosion*.
- Once active, *Cherry Bombs* destroy the surrounding *Pieces* in a 3 x 3 radius (3).



NEW LEVEL DESIGN II

Bubblegum Troll in Candy Crush Friends Saga

- When the *Bubblegum Troll* character is active, players collect 12 *Yellow Pieces* to put 2 *Bubble Blast Candies* (boosts) on the board.
- Players activate a *Bubble Blast Candy* by switching it with an adjacent *Piece*.
- This releases *Bubblegum Pieces* from each corner of the *Candy*.
- The *Bubblegum Pieces* then perform 3 diagonal bounces, destroying any *Pieces* they land on (1).

Purse in Matchington Mansion

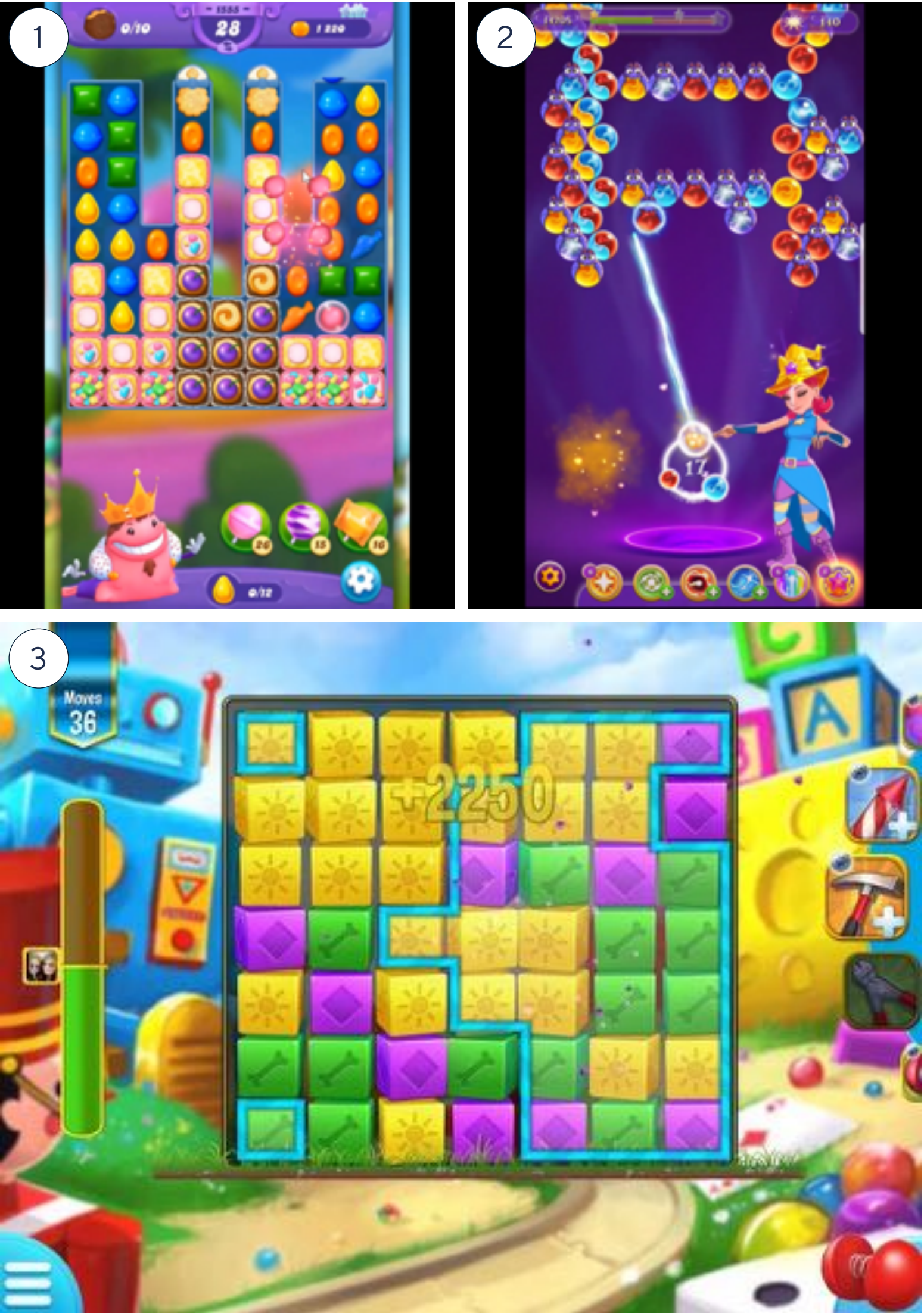
- Players make matches of specific-colored *Pieces* to remove the *Purse* hazard from the board.

Fairy Bubble in Bubble Witch 3 Saga

- In level play, each shot adds a *Fairy* to a pre-existing *Fairy Bubble*.
- Players can shoot the *Fairy Bubble* at any time to release the *Fairies* inside.
- The released *Fairies* destroy a number of *Bubbles*, depending on how many *Fairies* were collected (2).

Territory in Pet Rescue Saga

- When players make matches in a highlighted area on the board, the highlighted area expands.
- The larger the highlighted area at the end of the level, the bigger the reward (3).



DATA TOOL

Find All Level Designs

Review all the latest Puzzle level designs in the [Data Tool](#)

MARKET WATCH



6/1/19 - 6/30/19

NOTABLE RELEASES I

App	Library	Description
Candy Crush Saga	Champions Race	<ul style="list-style-type: none">If players finish top 3 in the Weekly Race, they enter the <i>Champions Race</i>.In the <i>Champions Race</i>, players are ranked by the number of levels completed.The top 3 players of the <i>Champions Race</i> win a prize (1).
	Fantastic Five	<ul style="list-style-type: none">Players are randomly entered into <i>Teams</i> of 5.<i>Team</i> pts are earned by logging in daily, clearing levels, and finishing episodes (2).
Homescapes	Paper Plane Generator	<ul style="list-style-type: none">If players complete a level, then a <i>Paper Plane Generator</i> is turned on.Players complete additional levels to upgrade the <i>Generator</i> (up to 3 times).Once on, players activate boosts to charge the <i>Generator</i>, launching 2, 4, or 6 standard <i>Paper Plane Boosts</i>.Losing a level turns off and resets the <i>Generator</i>.
Gardenscapes	Team Chest	<ul style="list-style-type: none">Players in <i>Teams</i> complete a number of levels (within a set amount of time) to open a shared chest reward.
Matchington Mansion	Win Moves	<ul style="list-style-type: none">After failing a level, players can watch an Ad to earn a wheel spin that awards coins, lives, or additional moves.
	Sticky Stickers	<ul style="list-style-type: none">Players complete a level once per day to earn a <i>Sticker</i>.<i>Stickers</i> can purchase coins, boosts, and unlimited lives (3).



NOTABLE RELEASES II

App	Library	Description
Matchington Mansion	Brenden's Juice Bar	<ul style="list-style-type: none">• Players collect <i>Pieces</i> to fill <i>Customer Juice Orders</i> and sell them for coins.• Additional rewards are received after filling 5, 25, and 50 <i>Customer Juice Orders</i> (1).
Fishdom	Teams	<ul style="list-style-type: none">• Players can join or create <i>Teams</i> to chat, partake in <i>Team</i> events, and exchange <i>Lives</i> for coin rewards.
	Go for Gold!	<ul style="list-style-type: none">• Players collect event-specific currency to play the <i>Go for Gold!</i> mini-game.• The mini-game uses an Angry Birds-inspired mechanic (2).
Best Fiends	Temper of Doom	<ul style="list-style-type: none">• This is an event paired with the release of the Temper's Adventure animation short.• Players complete 3 missions to clear an episode and unlock the next.• Completing all 13 episodes awards the <i>Treasure Hunter Temper</i> character (3).
Bubble Witch 3 Saga	Golden Pass	<ul style="list-style-type: none">• If players achieve a <i>3 Star Rating</i> on 3 levels within a set amount of time, they earn a <i>Golden Pass</i> and 30 minutes of unlimited lives.• The <i>Golden Pass</i> gives access to the <i>Pot of Gold</i> event room ... where players can win <i>Gold Bars</i>.



Find All the Recent Releases

Review all Puzzle features and events released this month in the [Data Tool](#)

FIND YOUR OWN TRENDS IN THE DATA TOOL



FEATURE DATABASE > DATA TOOL

Uncover new trends and understand competitor investments in the new [Data Tool](#)

SELECT CATEGORY

- 1. Genre: Puzzle
- 2. Category: (e.g. Features)
- 3. [Family](#): (e.g. Currencies)

ADJUST TIME

FILTER BY GAME

SEARCH

Feature

DATA

VIEW

Download CSV

CATEGORY

Game

Puzzle

Content

Events

Features

Accelerator

Currencies

Custom Design

Items

Other

100%

YEAR

MONTH

GAME

5 Differences Online

Angry Birds 2

Angry Birds Blast

Angry Birds Dream Blast

Angry Birds Match

Angry Birds Pop 2

Best Friends

Best Friends Stars

Blissful Blast Saga

Bricks n Balls

Bubble Witch 2 Saga

TITLE

PUBLISH DATE

CATEGORY

GAME

PERMALINK

Team Chat... Angry Birds Dream Blast

2019-08-21

Gameplay/Features/In-Game

Angry Birds Dream Blast

[https://www.boulderdash.com/library/features/team-chat-angry-birds-dream-blast](#)

Swirling Mx Dialogue... Angry Birds Dream Blast

2019-08-22

Gameplay/Features/In-Game

Angry Birds Dream Blast

[https://www.boulderdash.com/library/features/swirling-mx-dialogue-angry-birds-dream-blast](#)

Extreme Levels... Angry Birds Dream Blast

2019-08-24

Gameplay/Features/In-Game

Angry Birds Dream Blast

[https://www.boulderdash.com/library/features/extreme-levels-angry-birds-dream-blast](#)

2019 Update... Angry Birds Dream Blast

2019-08-26

Gameplay/Features/In-Game

Angry Birds Dream Blast

[https://www.boulderdash.com/library/features/2019-update-angry-birds-dream-blast](#)

Avatars... Angry Birds Dream Blast

2019-08-26

Gameplay/Features/In-Game

Angry Birds Dream Blast

[https://www.boulderdash.com/library/features/avatars-angry-birds-dream-blast](#)

Teams... Angry Birds Dream Blast

2019-08-26

Gameplay/Features/In-Game

Angry Birds Dream Blast

[https://www.boulderdash.com/library/features/teams-angry-birds-dream-blast](#)

Win Features... Angry Birds Dream Blast

2019-08-27

Gameplay/Features/In-Game

Angry Birds Dream Blast

[https://www.boulderdash.com/library/features/win-features-angry-birds-dream-blast](#)

New Star Flow... Angry Birds Dream Blast

2019-08-27

Gameplay/Features/In-Game

Angry Birds Dream Blast

[https://www.boulderdash.com/library/features/new-star-flow-angry-birds-dream-blast](#)

Win Currency... Angry Birds Dream Blast

2019-08-27

Gameplay/Features/In-Game

Angry Birds Dream Blast

[https://www.boulderdash.com/library/features/win-currency-angry-birds-dream-blast](#)

Soft Currency Policy... Angry Birds Dream Blast

2019-08-27

Gameplay/Features/In-Game

Angry Birds Dream Blast

[https://www.boulderdash.com/library/features/soft-currency-policy-angry-birds-dream-blast](#)

Boards... Angry Birds Dream Blast

2019-08-27

Gameplay/Features/In-Game

Angry Birds Dream Blast

[https://www.boulderdash.com/library/features/boards-angry-birds-dream-blast](#)

Star Flow... Angry Birds Dream Blast

2019-08-27

Gameplay/Features/In-Game

Angry Birds Dream Blast

[https://www.boulderdash.com/library/features/star-flow-angry-birds-dream-blast](#)

Star to Green Reward... Angry Birds Dream Blast

2019-08-27

Gameplay/Features/In-Game

Angry Birds Dream Blast

[https://www.boulderdash.com/library/features/star-to-green-reward-angry-birds-dream-blast](#)

Dream Peak... Angry Birds Dream Blast

2019-08-27

Gameplay/Features/In-Game

Angry Birds Dream Blast

[https://www.boulderdash.com/library/features/dream-peak-angry-birds-dream-blast](#)

EXP

1. Dow

EXPORT DATA

- 1. Download a .csv

UNDERSTAND TRENDS

- 1. All features are categorized

SEE IMAGES & VIDEOS

- 1. Click on the links for more images

APPENDIX



PUZZLE TAXONOMY

Family	Definitions
Accelerators	Increases the power, impact, or efficiency of play
Banks	Saves a % of spend that can be unlocked later
Bonuses	Free bonuses given to players (e.g. retention, W2E)
Challenges	Players must play, complete, and win
Clubs	A group accomplishing goals or competing with other groups
Collections	A set of items players collect (often for a completion prize)
Competitions	Players competing against other players
Cosmetics	Improvements or updates to the game or a feature
Currencies	Changes to currencies, economies, stores, and items
Custom Design	Options to customize the look
Expansions	Additional rooms, worlds, play modes, VIP lounges, etc.
Flows	Specific flows, like the NUX, ratings, and surveys

Family	Definitions
Hazards	Level elements/blockers that make levels more difficulty
Interactions	Any social feature with direct or indirect interaction
Leaderboards	Stand-alone leaderboards
Levels	Anything to do with leveling
Mini-Games	Smaller, shorter games within a game (e.g. scratcher cards)
Missions	A linear set of tasks that players must accomplish
Notices	Feature or product announcements
Other	Miscellaneous features and outliers
Profiles	Related to a player's setup, profile, settings, and controls
Purchases	Anything to do with purchases
Quests	Completing tasks to progress along a map or map-like feature
Rewards	Any reward players receive for engagement or spend (other than the bonuses family)

PREMIUM PARTNERSHIPS

Liquid and Grit partners with these premier market research and analytics companies to infuse our reports with the most relevant and detailed gaming user personas, data, and statistics available.

Quadrant Strategies	Kinrate Analytics	Sensor Tower
<p>Market Research</p> <p>Quadrant Strategies website</p> <p>Quadrant Strategies is a market research consultancy that uses research to help the world’s most prominent technology, gaming, and entertainment companies develop strategies for building their user base, increasing user engagement and spend, and strengthening their marketing and brand plans.</p> <p>We do that using a range of quantitative and qualitative methodologies, including gamer segmentation and persona development, feature testing, message creation, and loyalty and engagement modeling. The work of our senior leadership goes back many years, and includes long-term engagements for console and gaming-PC hardware-makers, individual games in a range of genres, and across consoles, PCs, and mobile, and for some of the top game franchises.</p>	<p>Player Personas</p> <p>Kinrate Analytics website</p> <p>Kinrate Analytics offers game developers, consultants, publishers, and cloud gaming operators the best cross-platform game recommendation engine for targeted marketing, as well as a novel profiling-as-a-service solution for intelligent market segmentation and social networking.</p> <p>Other services include advanced market prediction analyses for identifying emergent gaming trends, and access to unique AI-enhanced data of 140 thousand game titles and 48 million game players.</p> <p>The products of Kinrate Analytics have been developed in university-led research projects in collaboration of economists, psychologists, game scholars, and data scientists.</p>	<p>Mobile App Store Intelligence</p> <p>Sensor Tower website</p> <p>Sensor Tower is relied upon by financial analysts, VCs, and publishers who need to leverage data to identify the fastest growing apps, emerging markets, and more.</p> <p>Clients harness Sensor Tower’s suite of app intelligence tools to...</p> <ul style="list-style-type: none">▸ Evaluate app economies and app vitality▸ Drive organic growth with the leading App Store Optimization platform▸ Get the best global download and revenue estimates for the App Store and Google Play▸ Discover top creatives and better shape user acquisition strategy



“I could never convince the financiers that Disneyland was feasible, because dreams offer too little collateral.”

– Walt Disney

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