



Puzzle Report

Competitive Research and Actionable Product Recommendations

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AUGUST

2019

NEW INNOVATIONS



PUZZLE > EVENTS > MINI-GAMES >

PLAYABLE STORY EVENTS

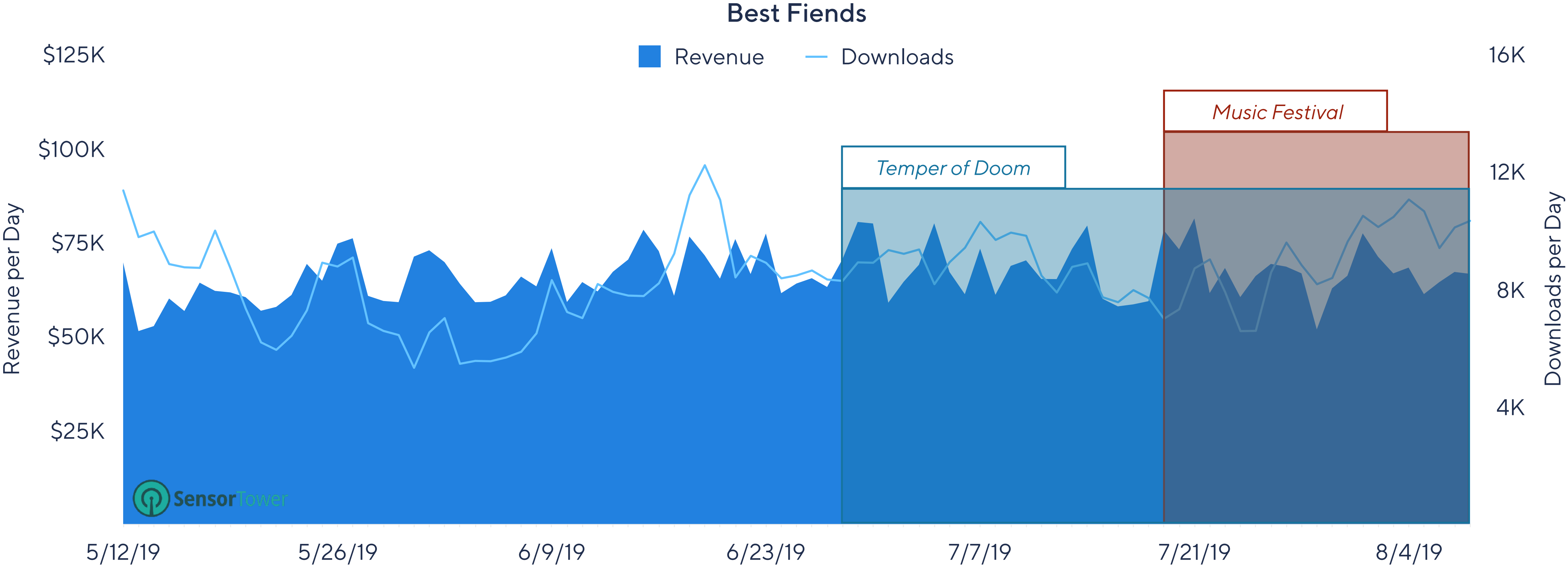
Temper of Doom & Music Festival in Best Fiends

REVENUE ANALYSIS



Revenue increased +6.2% WoW after *Temper of Doom* and +7.8% WoW after *Music Festival*, but did not sustain following either release. Revenue flattened 2Wo2W after *Temper of Doom*, and 3Wo3W after *Music Festival*.

Releases	
6/28-8/6	Taco Fiesta – Collection event
6/28-8/4	Temper of Doom – Mission event
7/19-8/4	Music Festival – Mini-Game event
7/30-8/1	Mega Gold Bundle – Sale
8/1-8/4	Buy 2 Get 1 Free Fiend Style – Sale
No IAP rankings change since 7/15/19	



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

FEATURE TEARDOWN

In the *Temper of Doom* event, players complete tasks to unlock story animations and rewards. During the *Music Festival*, players use hints to find lost items scattered around the app.

Temper of Doom Details

- An animation introduces the first episode of the story ([video](#)).
- Players must complete 39 tasks to fill a meter (1).
- Tasks include challenges, quests, and collections from level play, mini-games, and *Temper*-themed content (2).
- As the meter fills, players unlock episodes with story animations (3).

Music Festival Details

- Players read hints to find the locations of 12 lost items (4).
- The locations include features, menus, and mini-games (5 and 6).
- Players earn gold and keys for collecting all the lost items.



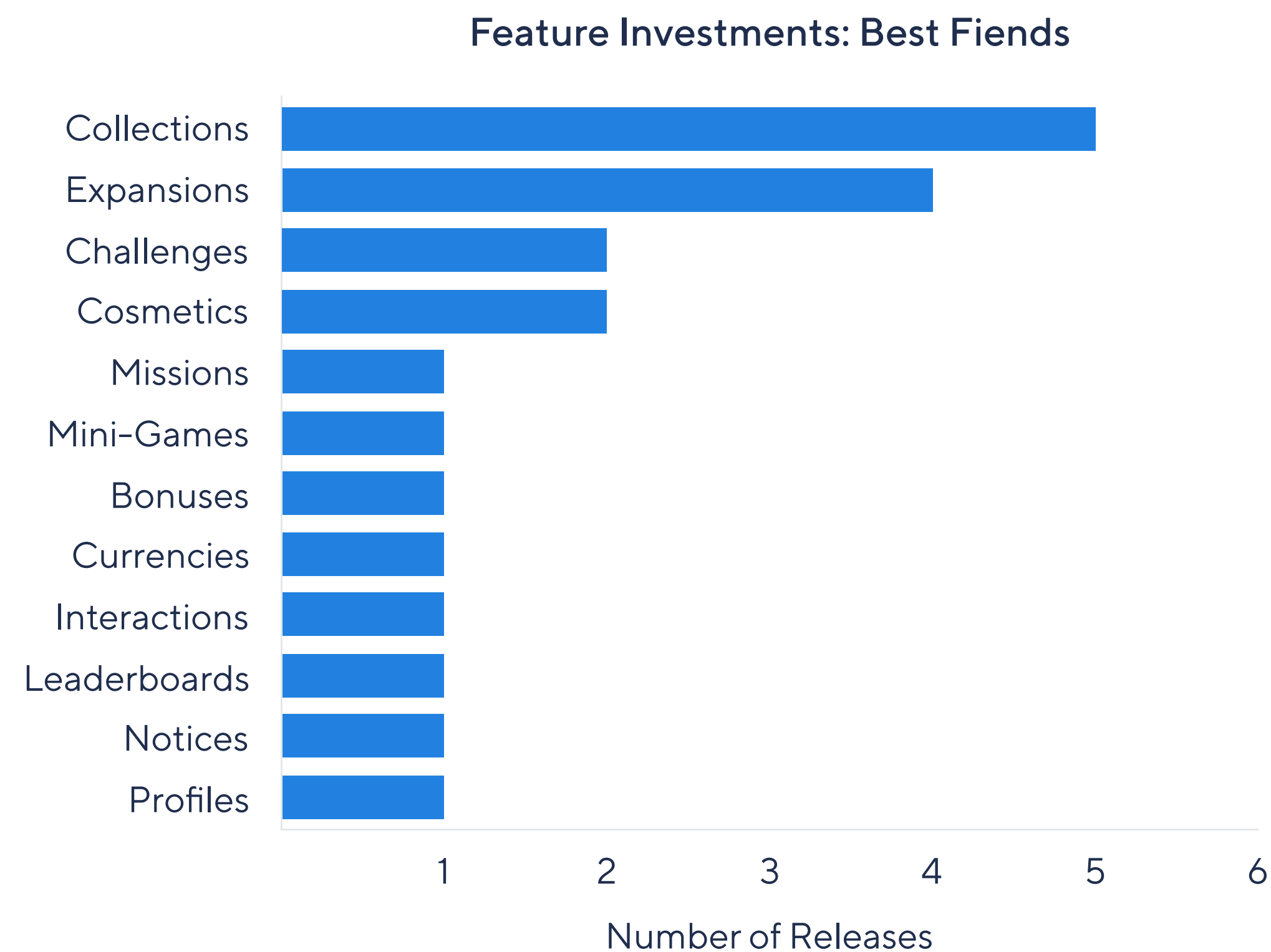
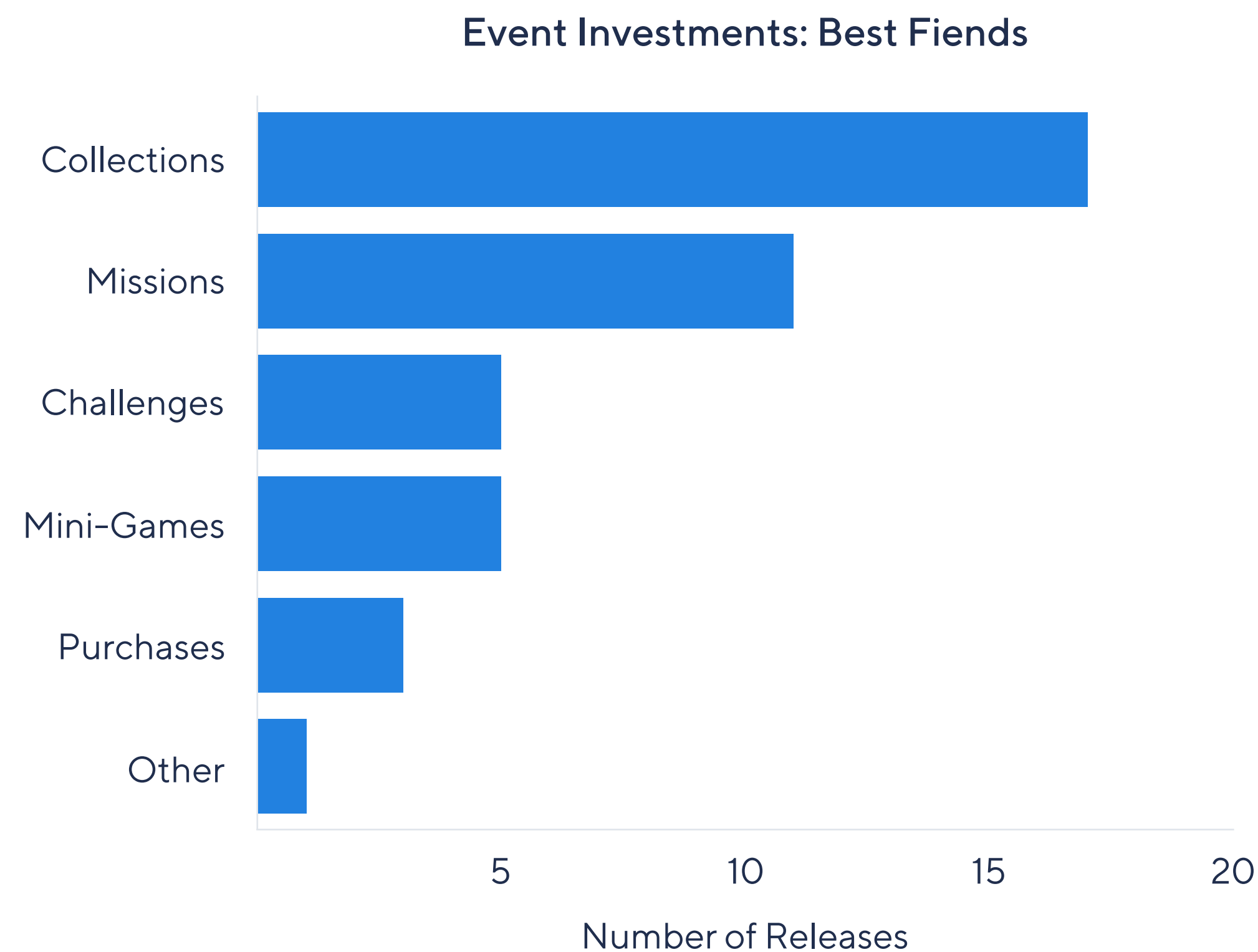
Feature Database > Gallery Tool

- Download screenshots and watch videos of [Temper of Doom](#) and [Music Festival](#) in the Feature Database's [Gallery Tool](#).



ROADMAP DATA

Best Fiends invests heavily in collections—both in new events and features—and uses mission events to drive engagement towards collection features.



Feature Database > Data Tool

- Download Best Fiends’ event, feature, and content release data using the [Data Tool](#) in the [Feature Database](#).
- See the [Appendix](#) for information on all of Liquid and Grit’s mechanic categories.

PRODUCT INSIGHTS

Add strong storylines and short movies to features and events to capture market share from non-gaming, movie-based entertainment apps.

Product Recommendations

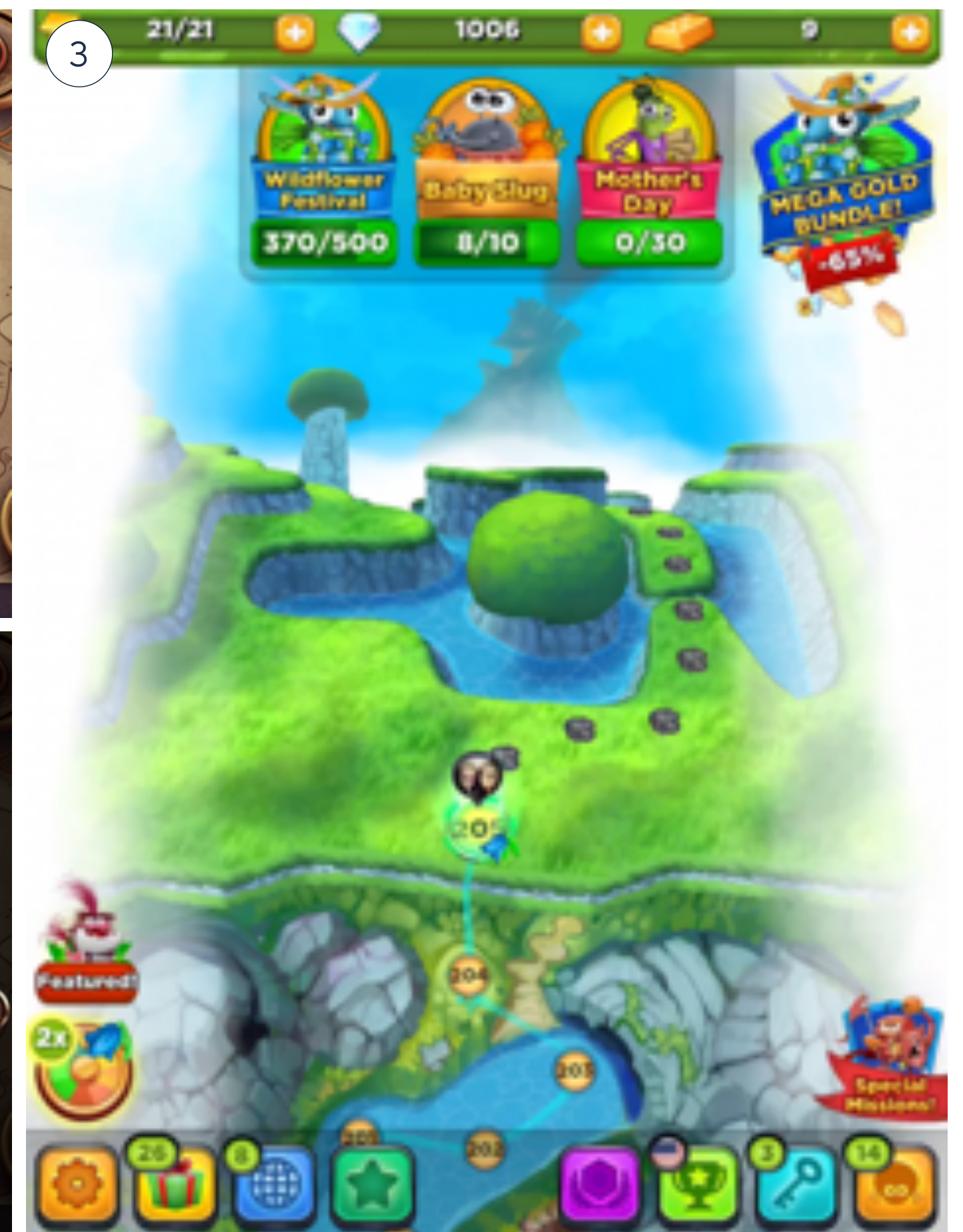
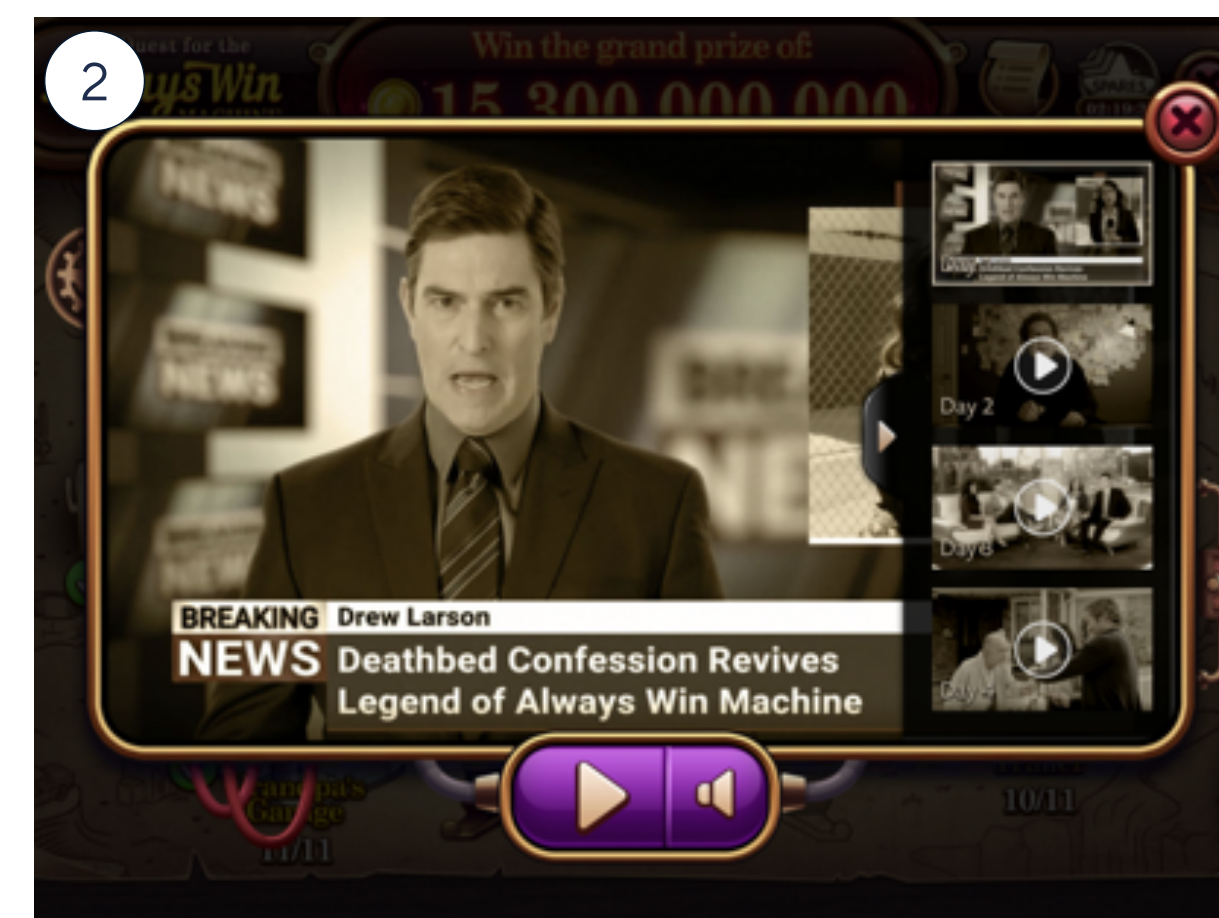
- **Video Player & Editor apps account for 15% of time spent on apps** (according to [App Annie](#)). To increase engagement, understand what non-gaming apps your players use and add similar entertainment (1 and 2).
- **Target mindfulness apps with marketing about mobile games' ability to relieve stress after work.** A recent [study](#) found that digital games may be a more effective way to recover mentally after work than mindfulness apps.
- **Release smaller events to drive engagement to larger ones.** Best Fiends uses collection events, like [Wildflower Festival](#), to drive engagement to mission events, like [Mother's Day Picnic](#) (3).

Player Insights

- **Use stories to help certain player types escape everyday life.** *Escapist Emily* turns to games, and most likely Video Player apps as well, to reduce worries.

Additional References

- **Review examples of storylines and videos in Casino and RPG.** Strong examples include Caesars Slots' [The Always Win Machine](#) (1 and 2), Raid: Shadow Legends' [Game Introduction](#), and AFK Arena's [Origin Story and Game Introduction](#).
- **Time spent on Video Player & Editor apps has increased 125% over two years, whereas games has only increased 30%.** Overall app usage increased 50% in two years. Find more information in, "The State of Mobile Games in 2019 and Beyond" by [App Annie](#).



PUZZLE > EVENTS > COLLECTIONS >

STOREFRONT MECHANICS

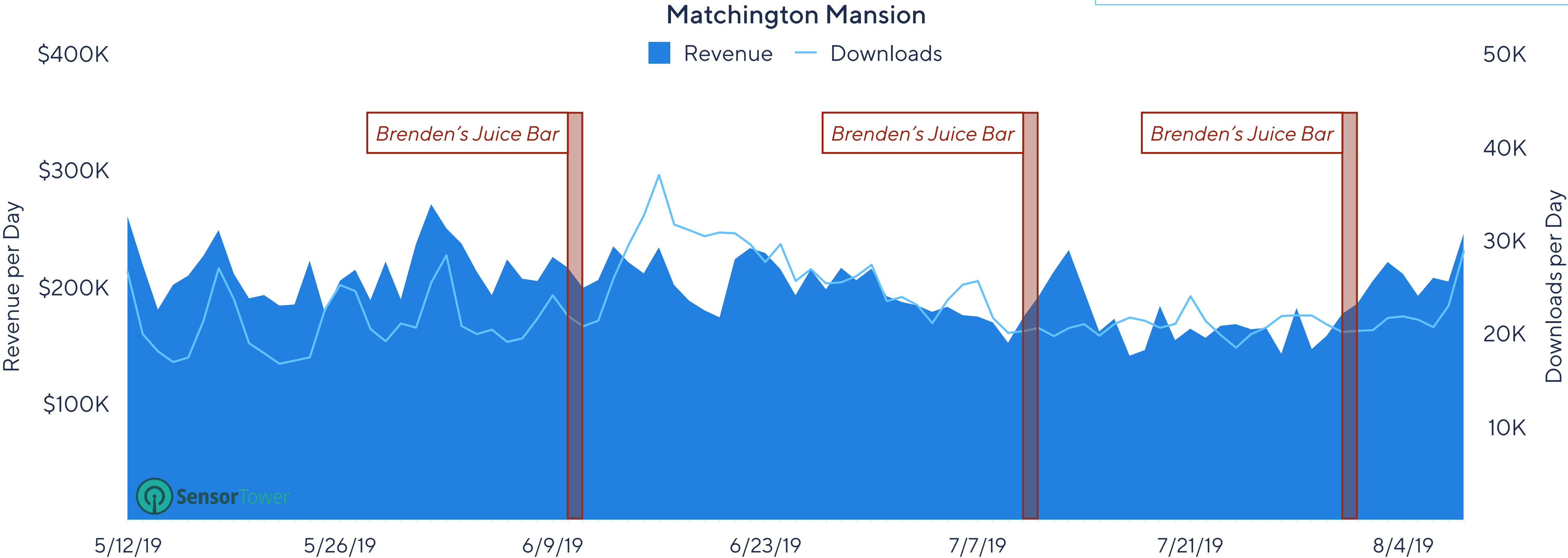
Brenden's Juice Bar in Matchington Mansion

REVENUE ANALYSIS



Although revenue was up +1.2%, +10.2%, and +24.4% WoW after the three releases of *Brenden’s Juice Bar* event, the revenue impact is undetermined because there were many events, sales, and content released at the same time.

Releases	
7/29-7/30	Tea Time Sale – Sale
7/29-7/30	Lucky Streak – Challenge event
7/30	Board Game – Mini-Game event
7/31-8/1	Brenden's Juice Bar – Collection event
7/31-8/1	Grandfather Clock Sale – Sale
8/2-8/5	Secret Beach – Custom Design event
8/2	Good Neighbor Deal – Sale
8/3-8/4	Package Sale – Sale
8/5-8/6	Lucky Streak – Challenge event



• *Brenden’s Juice Bar* events ran for two days only starting on 6/10/19, 7/10/19, and 7/31/19

FEATURE TEARDOWN

Players complete levels to collect elements to fulfill juice orders for customers. Completed orders fill a meter that awards players at three different points.

Details

- Players complete levels to collect different elements (1).
- Players use the elements to fulfill customers' orders (2).
- Fulfilling an order awards coins and advances players along a meter.
- The meter awards players unlimited lives and boosts at three different milestones.
- Players earn special rewards by completing certain orders within a time limit (3).

Additional Information

- Download screenshots and watch videos of [Brenden's Juice Bar](#) in the Feature Database's [Gallery Tool](#).

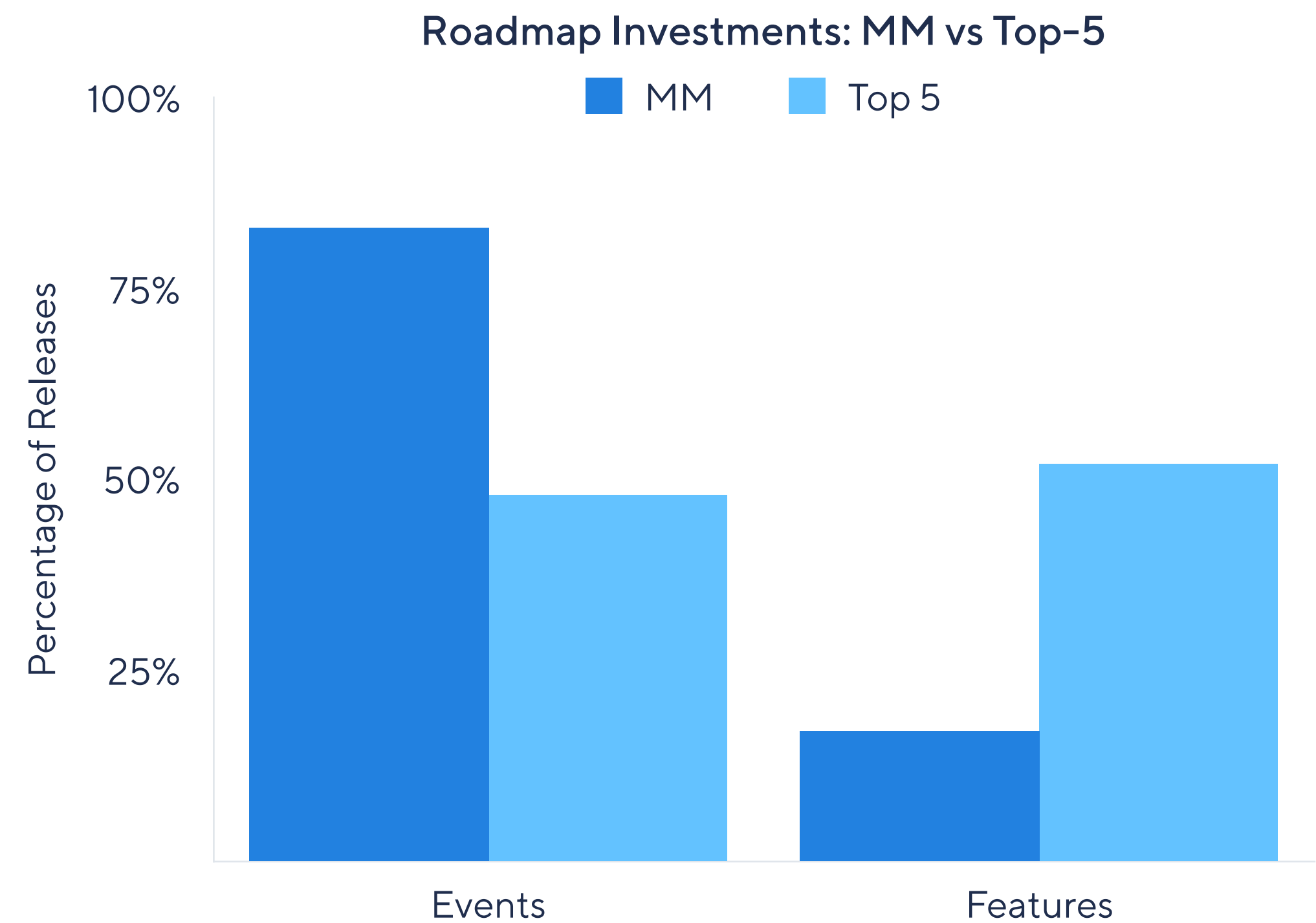
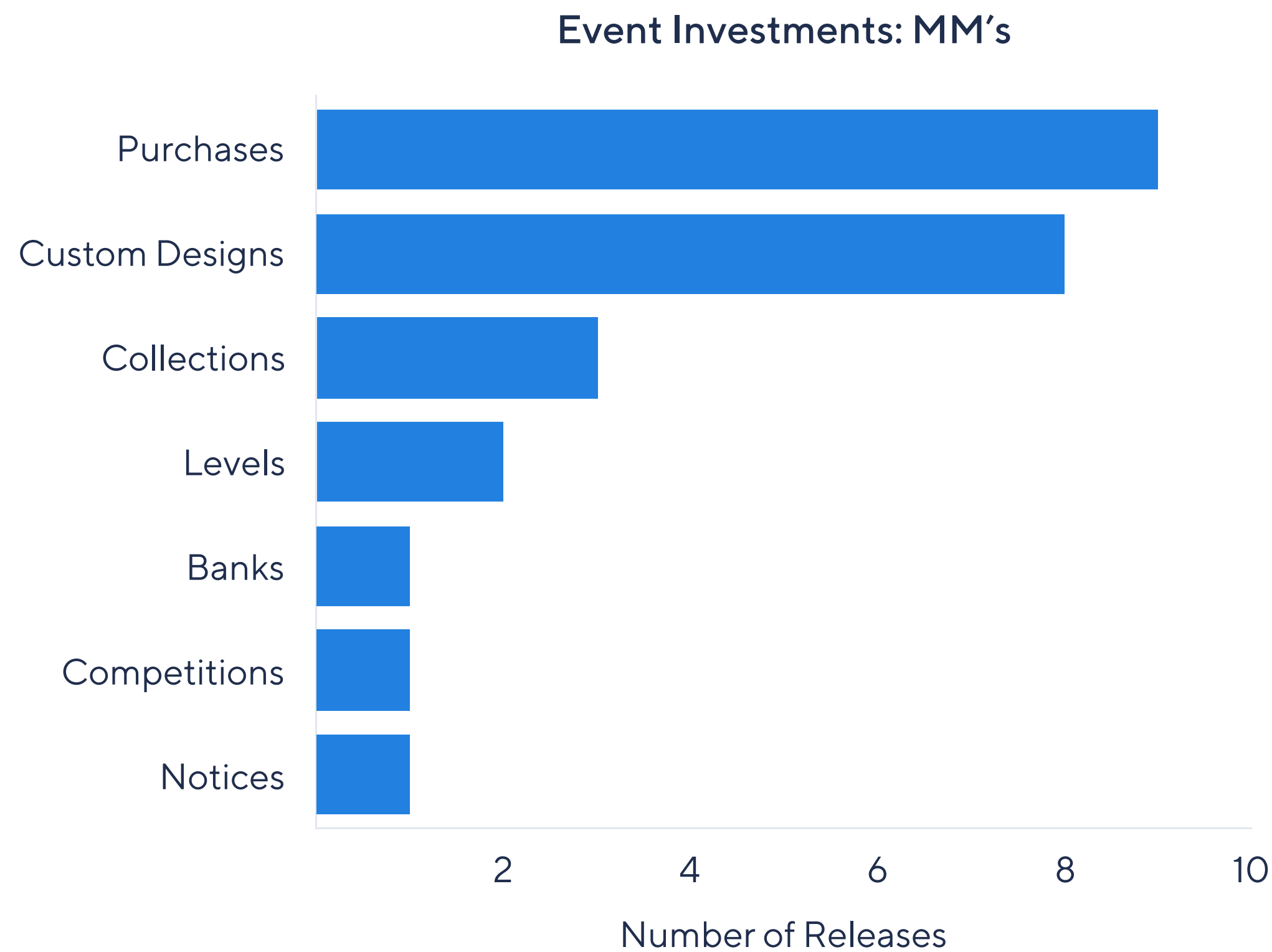


ROADMAP DATA

Custom design events are a top product investment for Matchington Mansion (MM) in 2019. Compared to other top-grossing Puzzle apps, MM invests much more in events.

Data Insights

- 22% of MM’s total events released in 2019 are custom design events (2 in 2018 and 8 already in 2019).
- Purchase events are MM’s largest event investment in both 2019 and 2018. MM has released 9 purchase events in 2019 and 6 in 2018.
- 83% of MM’s non-content releases are events. In comparison, the top-5 grossing apps invest 48% in events.



PRODUCT INSIGHTS

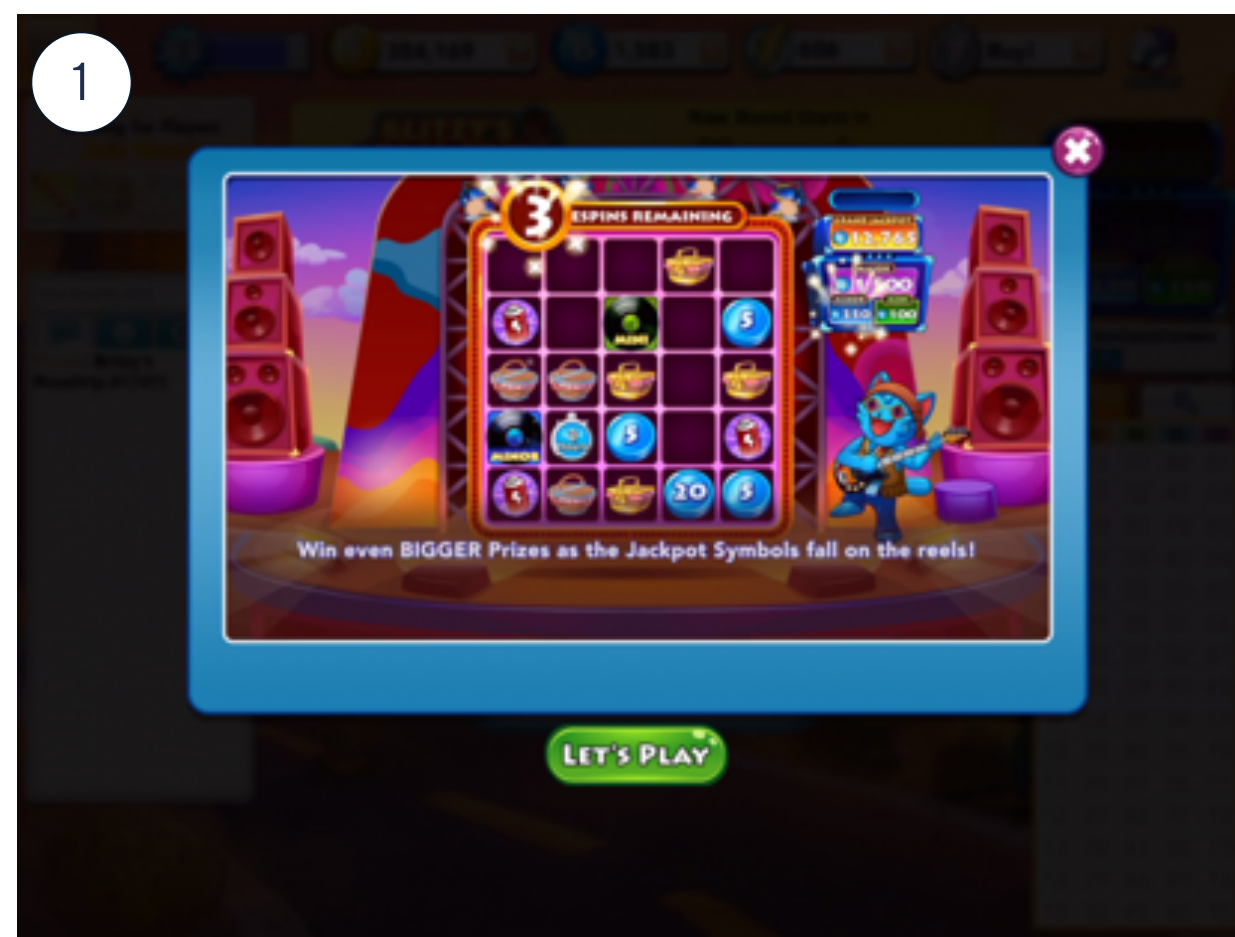
Take advantage of other genres by implementing simplified versions of their core mechanics in short mini-games.

Product Recommendations

- **Leverage gameplay from other genres with overlapping players.** In Bingo Blitz, a top-grossing Casino app, revenue increased +38% WoW after the release of a simplified slots machine in a bingo room (see image 1 and the [Simplified Slots Machine](#) Wiki Page). In top-grossing Hidden Object apps, players can play match-3 puzzle mini-games to earn rewards, progress, and participate in events (see image 2 and Seeker's Notes' [Puzzle Features](#) Library).
- **Simplify and shorten mechanics from other genres.** This gives players the best part of another genre while removing all the barriers of starting a new game—downloading the app, learning the meta-game, and hitting pinch points.
- **Matchington Mansion adopts mechanics from several genres.** In Matchington Mansions' [Secret Beach](#) event, players build a custom design area using a mechanic inspired by Casual, Sims-style apps. Players can decorate buildings, once they are complete (see image 3). This mechanic is also in Home Design Maker (see [Fourth of July Patio](#) Library).

Additional References

- Review the [Spring Bundle](#) purchase event that was a revenue driver in the [April 2019 Puzzle Report](#). See the [Engagement Bonus Bundle](#) Wiki Page for details.
- Use the [Gallery Tool](#) to see events by category by game. For more on Matchington Mansion, go to [Purchase Events](#) or [Custom Designs Events](#).



IN SOFT LAUNCH



FARM HEROES CHAMPIONS BY KING

Soft Launch: 11/20/18

Countries: Brazil, Great Britain, and Mexico

APP TEARDOWN

In Farm Heroes Champions, players progress by completing match-3 levels to unlock chapters in a story. Boosts, clubs, and challenges are core features (clubs and challenges are similar to features in Toon Blast).

App Details

- **Boosts are heavily integrated into the app.** Players can choose boosts before playing a level, select boosts while playing a level, and create boosts by matching pieces during level play. Unlocking an in-level boost awards unlimited use of that boost for the level (1 and [video](#)).
- **Clubs are similar to the trending club features in Puzzle.** In Farm Heroes Champions' [Teams](#), which is categorized as a clubs feature, players request and send lives—similar to Toon Blast's [Teams](#) (2).
- **The two main challenge features reward players for completing levels.** [Star Crate](#) requires players to earn stars by completing levels, which is similar to Toon Blast's [Star Chest](#) (3). [Hunter Crate](#) asks players to complete a number of levels, which is similar to Toon Blast's [Toon Chest](#). Both mechanics are also seen in Playrix's Wildscapes (currently in soft launch).

Additional Insights

- **Review all the insights on club features from Puzzle and Casino.** See [Clubs with Sharing Lives](#), [Club Features and Releases](#), and [Clubs Chests with Leaderboards](#) Wiki Pages for the analysis of clubs in Puzzle, and the [Club Feature](#) Wiki Page for clubs in Casino.



Feature Database > Wiki Tool

- Review all the previously-released Revenue Drivers from past Reports using the [Wiki Tool](#) in the [Feature Database](#).



LEVEL MECHANICS



NEW LEVEL DESIGNS I

Flowerpots in Homescapes

- Players grow flowers by making matches and activating power-ups.
- Once every flower is fully grown, all flower pots disappear (1).

Bunnies in Gardenscapes

- Hidden bunnies are gradually revealed as players make matches or activate power-ups next to a bunny's hiding place.
- Players must uncover and collect all bunnies to complete a level.

Dishwasher in Toy Blast*

- Players open dishwashers by hitting them with specific power-ups.
- Once opened, each dishwasher contains plates.
- Players collect plates by making matches on adjacent positions (2 and [video](#)).

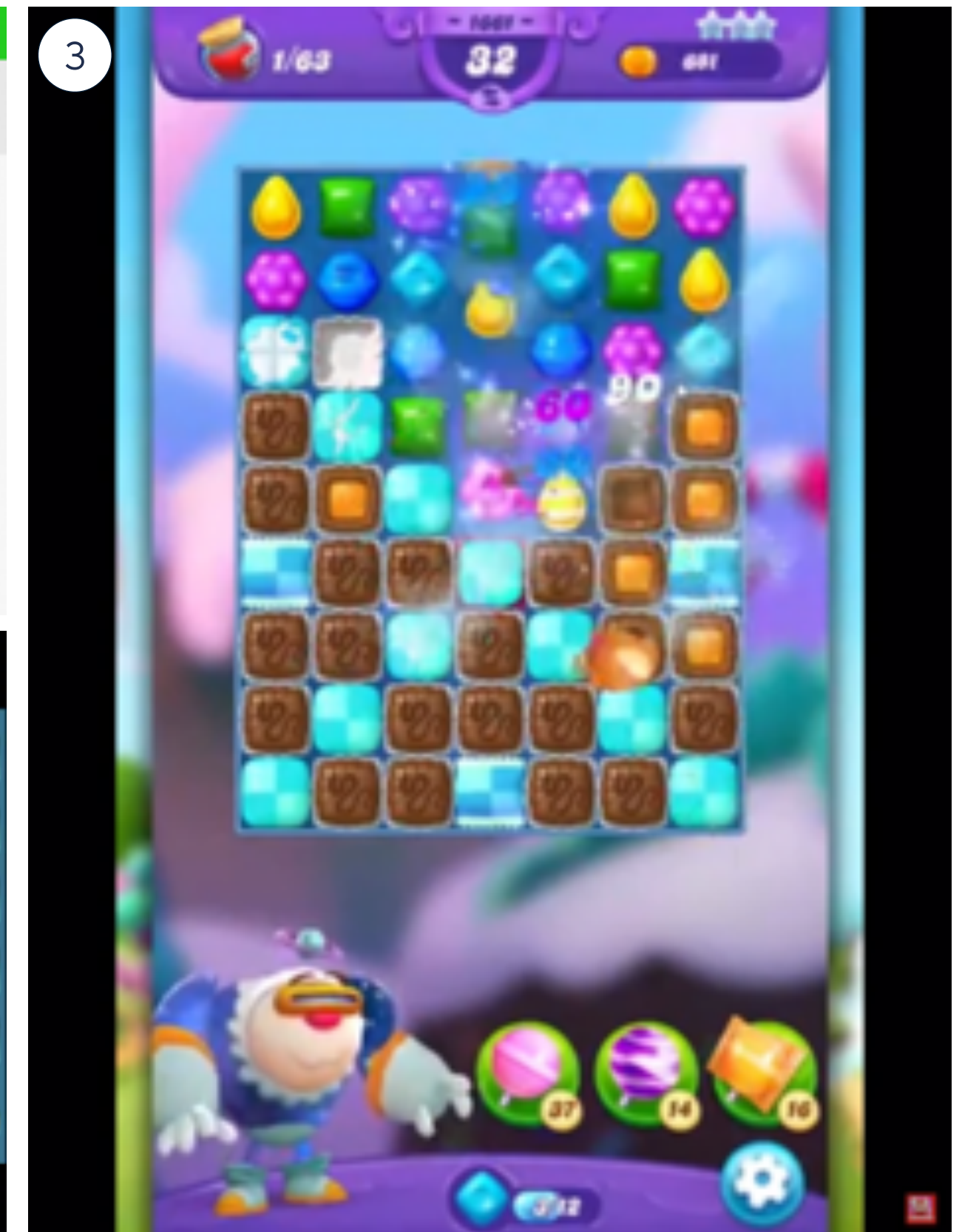
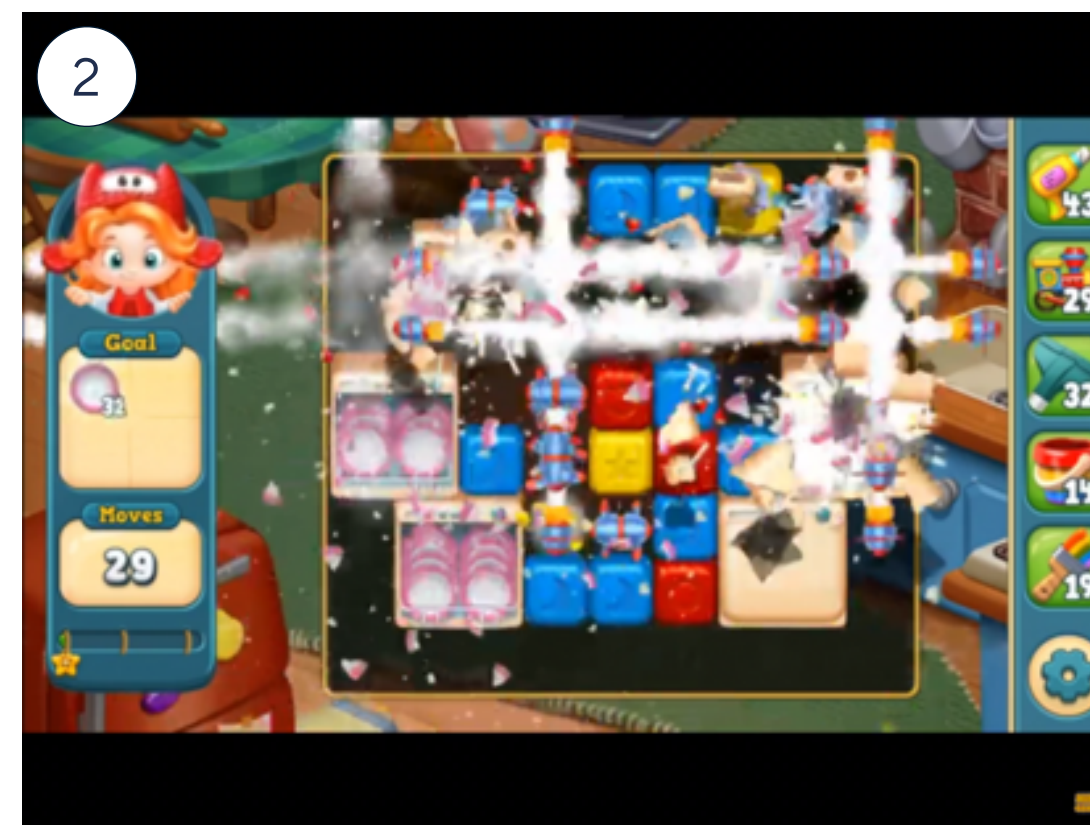
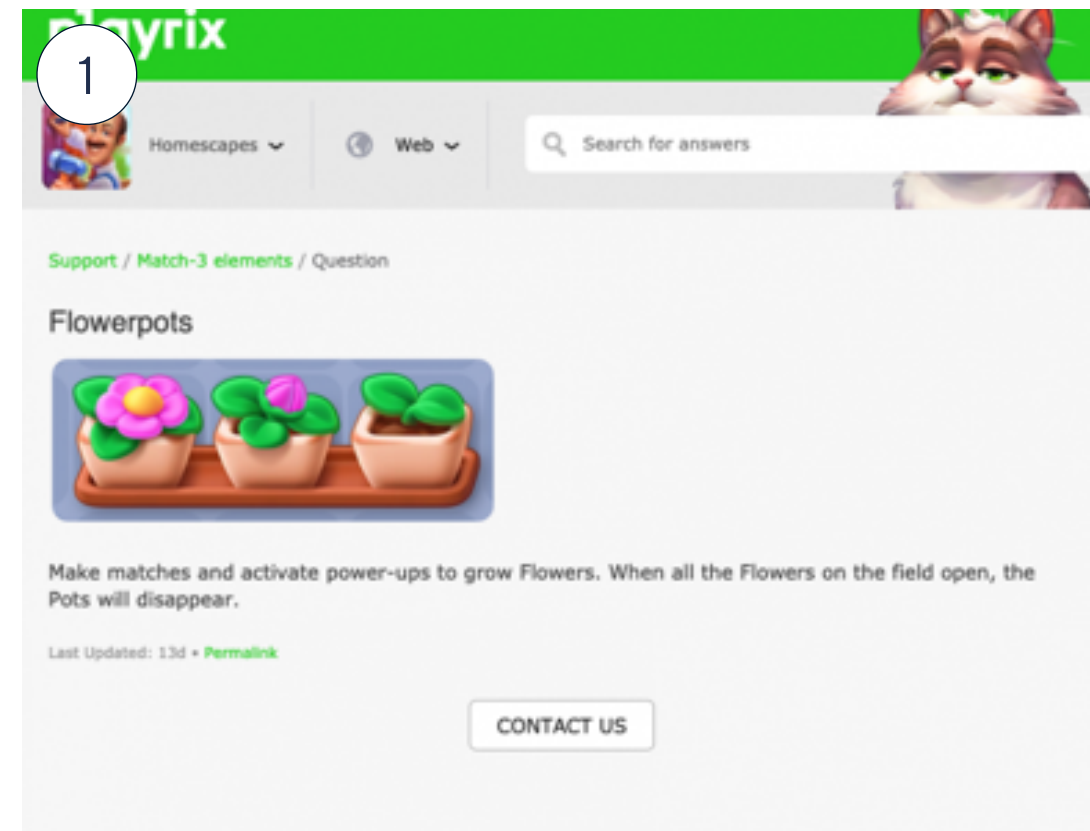
Blue Fizz in Candy Crush Friends Saga*

- *Blue Fizz* pieces have up to four layers.
- Players must remove each layer by making matches next to *Blue Fizz* pieces or by hitting them with power-ups.
- When triggered, *Blue Fizz* damages all diagonal pieces for two spaces (3 and [video](#)).

Water Rocket in Fishdom

- Players charge water rockets by matching corresponding colors.
- Fully charged water rockets explode, destroying or damaging every tile in their row.

* Level mechanic found on YouTube or fan sites.



NEW LEVEL DESIGNS II

Iceberg in Fishdom

- Icebergs are indestructible objects that freeze one adjacent piece each turn (1 and [video](#)).
- Frozen pieces can be covered in up to two layers of ice.
- Players remove layers of ice by making matches with the ice or by hitting them with power-ups.

Rock Star Lacey in Best Fiends

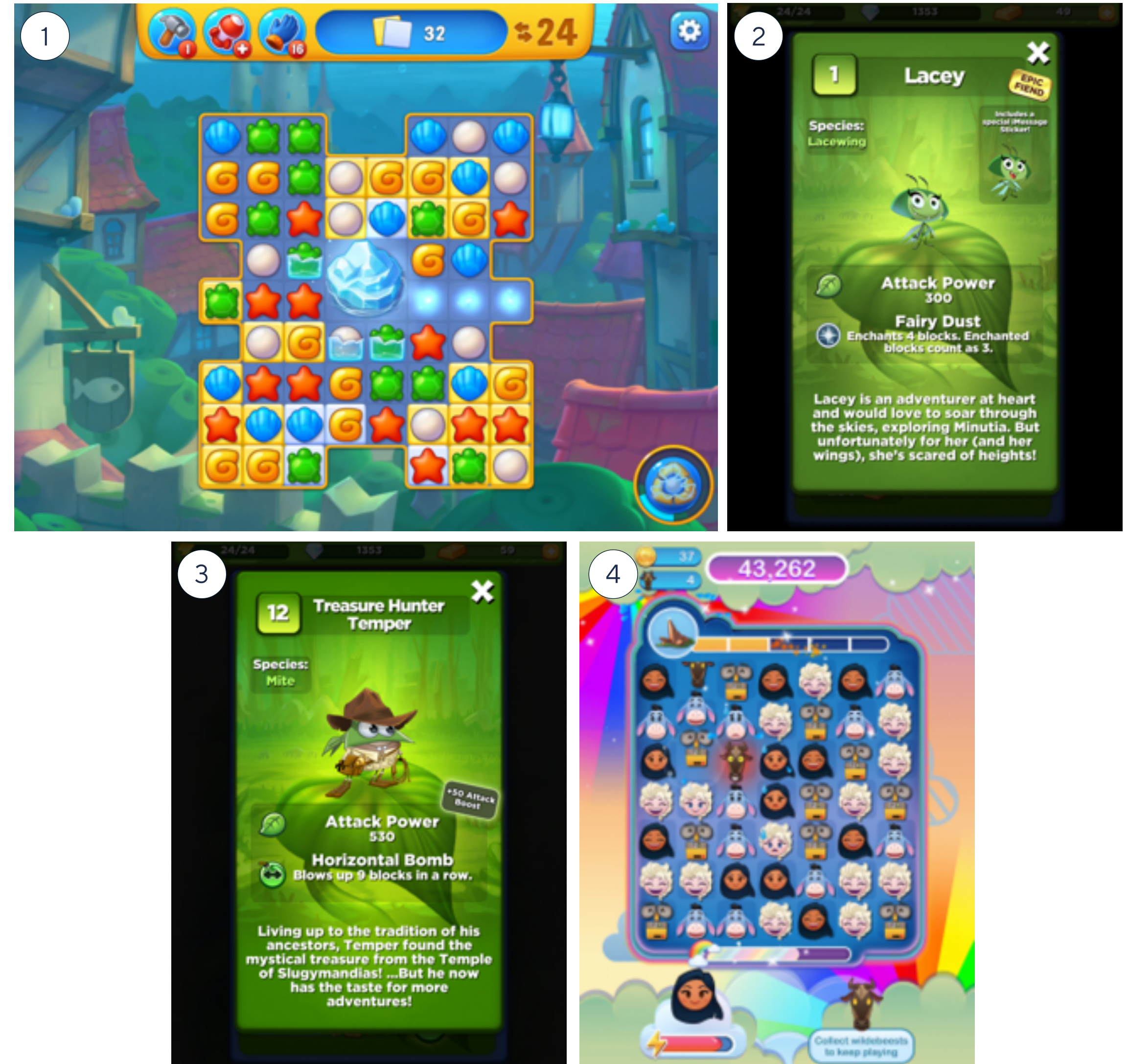
- *Rock Star Lacey* can be unlocked as part of the [Music Festival](#) (2).
- Players charge *Lacey*'s special meter by linking green pieces.
- Once charged, *Lacey* enchants four pieces with multipliers.
- Each enchanted piece counts as three pieces when collected.

Treasure Hunter Temper in Best Fiends

- Players unlock *Treasure Hunter Temper* as part of the *Temper of Doom* event (3).
- Linking green pieces fills *Temper*'s special meter for his *Horizontal Bomb*.
- When triggered, the *Horizontal Bomb* blows up nine pieces in a row.

Wildebeest in Disney Emoji Blitz

- Players try to collect wildebeests before they attack by activating power-ups.
- When wildebeests attack, they take away one health per turn (4).
- The round ends when players lose all their health.



MARKET WATCH



7/1/19 – 7/31/19

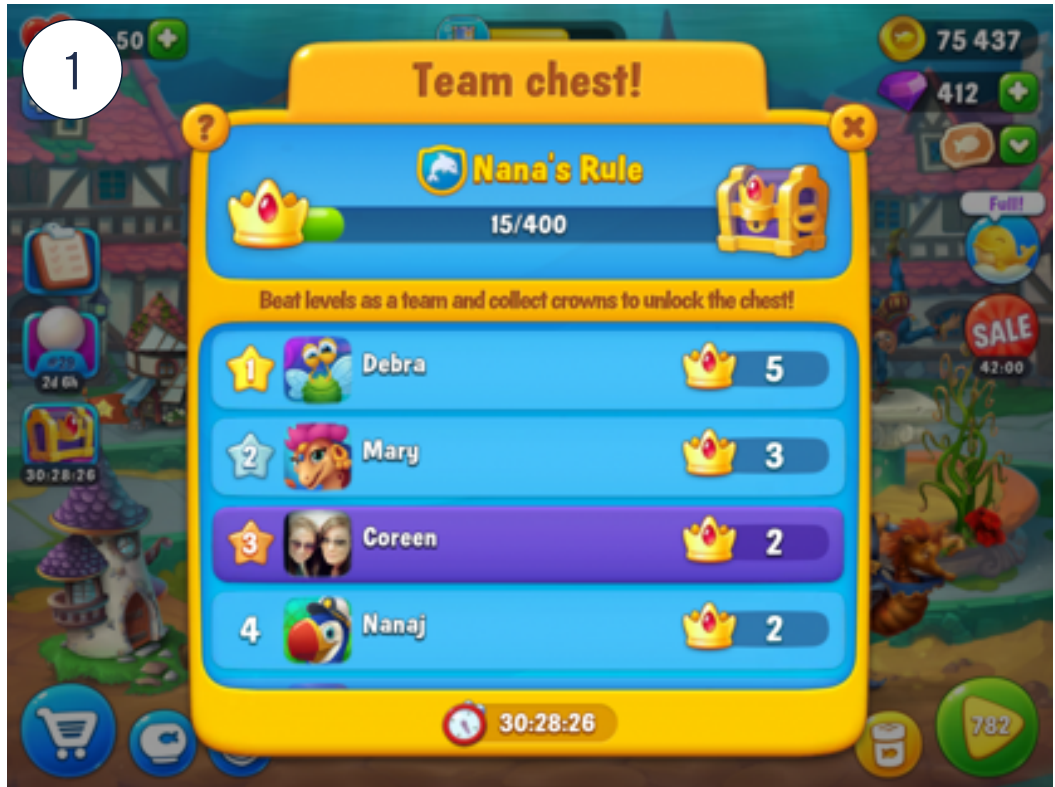
NOTABLE RELEASES I

App	Library	Description
Candy Crush Saga	Garden Party	<ul style="list-style-type: none">In anticipation of the release of level 5K, any player level 10 or above can play levels 1K, 2K, 3K, and 4K.
Homescapes	William's Birthday	<ul style="list-style-type: none">Players beat levels and complete challenges to earn stickers.Stickers can be used to purchase special decorations.Buying decorations fills a meter that rewards players at 3 different milestones (1).
Gardenscapes	Attic	<ul style="list-style-type: none">Players match pieces flagged with ticket labels to collect event currency.Players spend the event currency to renovate a limited-time area (2).Completing the renovations within the event's time limit allows players to keep the content permanently.
	Gardener's League	<ul style="list-style-type: none">Players beat levels to earn gold shields for their team.At the end of the event, the team with the most shields splits a prize (3).



NOTABLE RELEASES II

App	Library	Description
Fishdom	Team Chest	<ul style="list-style-type: none">As part of a team, players complete levels to earn crowns.Teams who collect 400 crowns before the end of the event unlock a chest (1).
Solitaire Grand Harvest	60 Minute Mania	<ul style="list-style-type: none">Players receive 1 challenge every hour, for 24 hours.Completing 3 challenges awards gold coins and boosts.
	Red Truck Payback	<ul style="list-style-type: none">During the event, players who make a purchase unlock a 1-hour payback.The payback returns any boosters used during the previous hour.
Cookie Jam	Pet Costumes	<ul style="list-style-type: none">Players beat levels to collect tokens for this secondary collection (the primary collection is Pets).Players spend tokens to unlock common, rare, and epic costumes for their pets (2).
Solitaire TriPeaks	Friends Center	<ul style="list-style-type: none">Players can request coins from friends every 4 hours (3).Up to 5 friends can respond to each request.



NOTABLE RELEASES III

App	Library	Description
Home Design Makeover	Piggy Bank	<ul style="list-style-type: none">• Players beat levels to add gems to the piggy bank.• Extra gems are added for any unused turns.• Once the bank contains 400 or more gems, players can buy all the gems for \$2.99.• The bank can hold a max of 600 gems (1).
	Leagues	<ul style="list-style-type: none">• During level play, players collect coupons and are ranked on the leaderboard.• Players who finish in the top tier are promoted to higher leagues, while players at the bottom tier are demoted to lower leagues (2).
Pet Rescue Saga	Teams	<ul style="list-style-type: none">• During each 2-week season, players beat levels, log in daily, and complete episodes to earn prizes based on their total team points (3).
Breakout App	Dr. Mario World	<ul style="list-style-type: none">• Players clear levels by matching capsules with viruses.• Players select doctors and assistants from a collection of characters.• Every doctor and assistant has a unique skill.• Versus mode allows players to compete head to head.• Players are ranked in tiers based on battle points.
Dr. Mario World by Nintendo		



Feature Database > Data Tool

- Review all the recent releases using the [Data Tool](#) in the [Feature Database](#).



UTILIZE L&G'S TOOLS

Uncover new puzzle trends and understand competitor investments with Liquid and Grit's tools and capabilities. A benchmarking Matrix tool is coming soon!



DATA TOOL

1. Find new trends using the Data Tool's categorization
2. Benchmark your app's output against competitors
3. Export data into .csv to do more in-depth analysis



WIKI TOOL

1. Reference all Liquid and Grit's insights
2. Find and download previous Reports
3. Uncover revenue driving features from other genres



LIBRARY TOOL

1. Watch videos to understand the animation and flows
2. Download images to use as design templates and spec references
3. Check out level-locked machines and features



SLACK REPORTS

1. Read the Reports in any Slack channel
2. Start a team conversation about new designs and innovations
3. Quickly review the Report's Executive Summary

APPENDIX



MECHANICS 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 app 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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