LIQUID&GRIT

Puzzle Report

Competitive research and actionable product recommendations

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JUNE

2018

STRATEGY INSIGHTS

GOOGLE PLAY INSTANT

The organic installs from Google Play Instant (GPI) are currently modest. Consider waiting until GPI is available for AdWords before incurring the development costs

GPI is now available to all developers

Major KPI benefits of GPI are:
1. Installs from GPI URL via search, messages, and social media
2. Installs from the Google Play Store and Google Play Games app
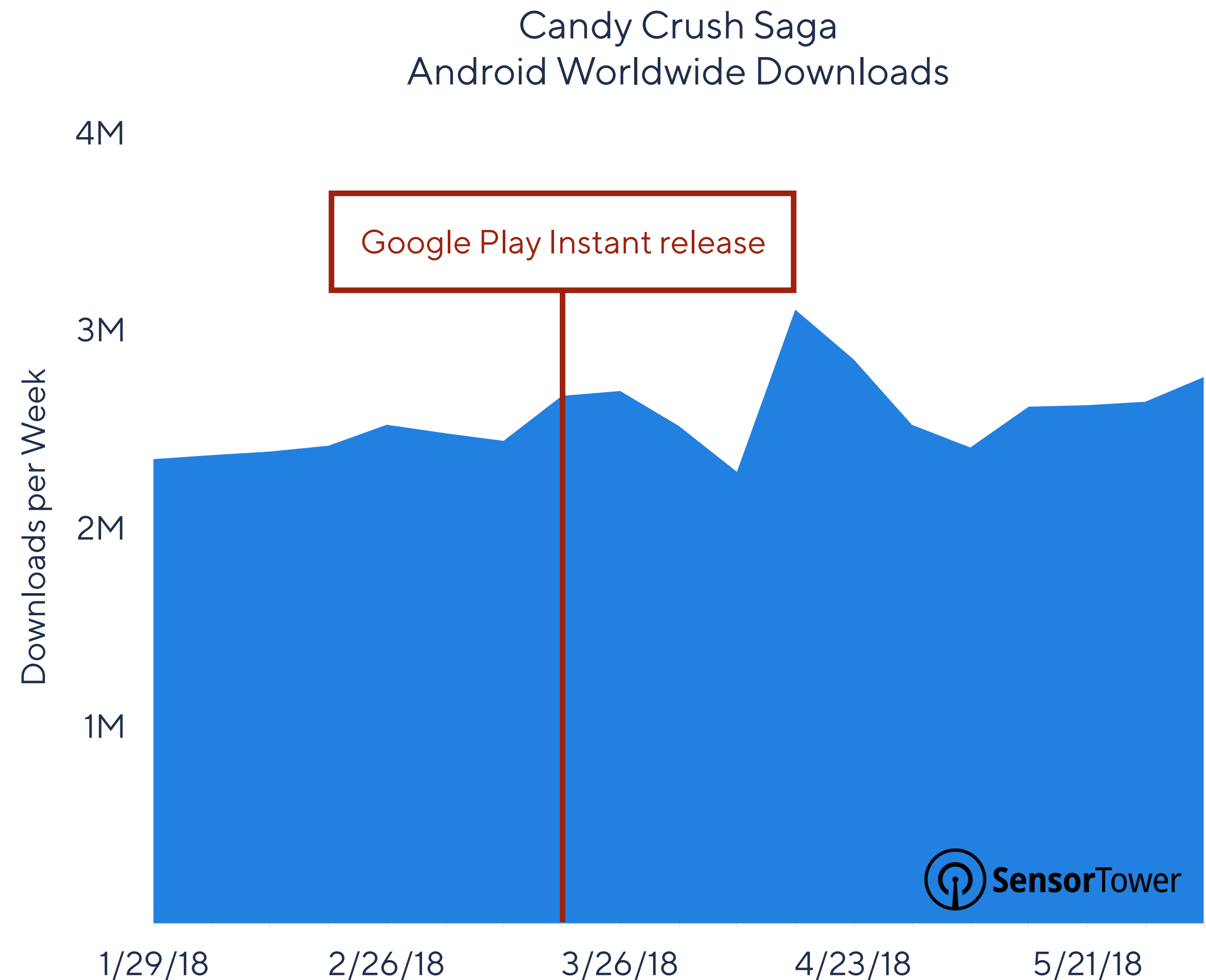3. Dev-related benefits, including an increase in APK size from 6 to 10 MB

Initial data points are modest:
1. Android reported that early adopters have seen up to 15% more installs. This data point is based on the first 10 apps available in beta ... so discount it heavily. There was no *sustained* install boost for Candy Crush Saga on Android (see graph)

Forecasted install value is meaningful due to AdWords:
1. Google is currently testing GPI on AdWords. Therefore, GPI could potentially be available on all Universal App campaign channels
2. Facebook is also testing a similar play-before-download functionality

Discuss with your Tech Lead to understand the dev-related benefits of GPI

Candy Crush Saga
Android Worldwide Downloads

Google Play Instant release

Downloads per Week

4M

3M

2M

1M

1/29/18   2/26/18   3/26/18   4/23/18   5/21/18

SensorTower

4

NEWCOMER: HOME DESIGN MAKEOVER

Home Design Makeover by Storm8 Studios is now a top 50 grossing Puzzle iOS U.S. app. Hard-launched in January 2018, the app has match 3 gameplay with a custom home design meta-game

Home Design Makeover
iOS-only in the U.S.

■ Revenue — Downloads

Revenue per Day		Downloads per Day
$150,000		40,000
$120,000		30,000
$90,000		20,000
$60,000		10,000
$30,000		

1/22/18　2/5/18　2/19/18　3/5/18　3/19/18　4/2/18　4/16/18　4/30/18　5/14/18　5/28/18

SensorTower
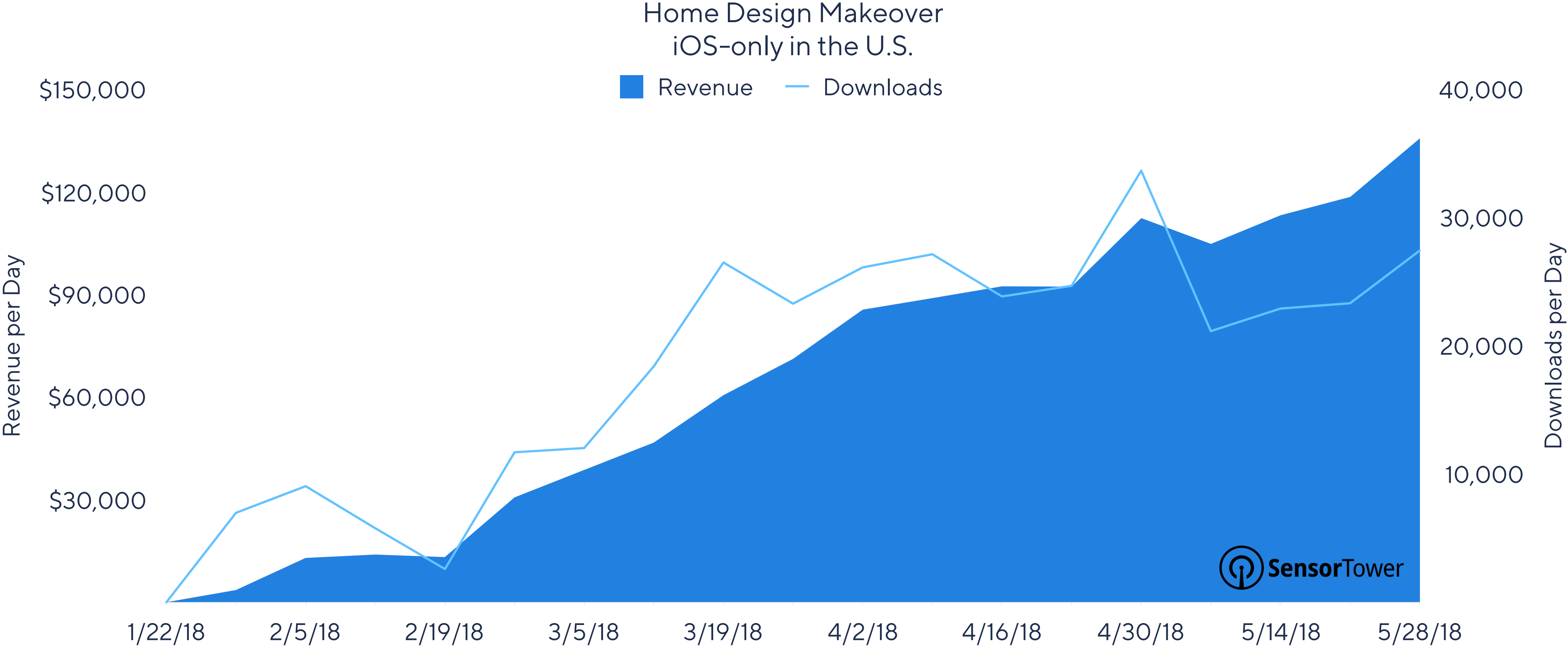
TUNING TRANSPARENCY

Jam City revealed the odds of their new bonus feature in Cookie Jam. Given the recent legal scrutiny around games, developers should consider adopting this approach to strengthen player trust

REVENUE PRODUCERS

TAMAGOTCHI BOOSTS

FEATURE SNAPSHOT

Tamagotchi Boosts are the latest proven mechanics from another genre to be successfully applied to Puzzle apps

Additional Information
- Hatchlings – Angry Birds 2
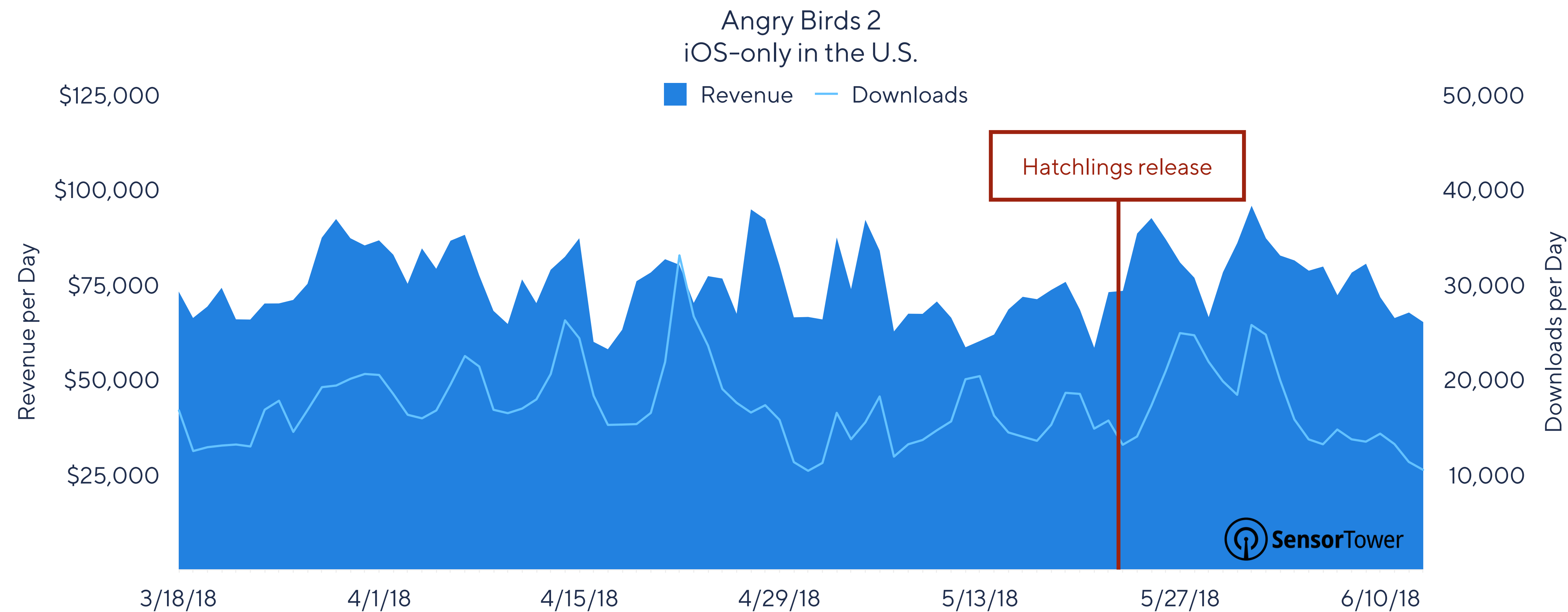- Release: 5/22/18
- Target Player: Companion

Related Features
- Candy Pet – Candy Crush Saga
- Evolving Dragons – Caesars Slots
- Daily Bonus Streak – Candy Crush Jelly Saga

Impact

Longevity

Repeatability

Skinnability

Cost

IMPACT ANALYSIS

Hatchlings is a *Tamagotchi Boost* feature that increased Angry Birds 2 revenue by 17% WoW and 22% Wo2W

Angry Birds 2
iOS-only in the U.S.

Revenue — Downloads

Hatchlings release

SensorTower

Revenue per Day: $125,000 — $100,000 — $75,000 — $50,000 — $25,000

Downloads per Day: 50,000 — 40,000 — 30,000 — 20,000 — 10,000

3/18/18   4/1/18   4/15/18   4/29/18   5/13/18   5/27/18   6/10/18

FEATURE INSIGHTS

Enhance the *Tamagotchi Boost* design with an add-on that specifically *fits your target player audience* (e.g., a sharing system for social players)

Feature Details
- Upon app-entry, a *Hatchling* egg appears near the slingshot (1)
- Tapping the egg starts a countdown timer with a pay-to-unlock option (2)
- Once unlocked, *Hatchlings* multiply player scores (3)
- Players level-up the *Hatchling* to increase the multiplier. Levels are gained by feeding it *Apples* to fill a meter or by paying with gems (4)
- If not fed, the *Hatchling* leaves, the multiplier resets, and a new egg appears (5)
- Players receive *Apples* as rewards in almost all economy faucets and can purchase them from the *Hatchling Food Shop* (6)

Key Takeaways
- Deeply integrate *Tamagotchi Boosts* into the core aspects of the Puzzle app, and keep players attentive to the main app content ... rather than focusing on the pet itself
- Create characters that are easily identifiable, charming, and have distinct personalities. Build a brand around characters that connect with players (review how Best Fiends generated 600K YouTube subscribers using this technique)
- *Tamagotchi Boosts* are also surfacing in the Casino category: Big Fish Casino released *Awaken Your Dragon* as part of a decoration-based feature, and Caesars Slots released *Evolving Dragons* as part of a slot machine

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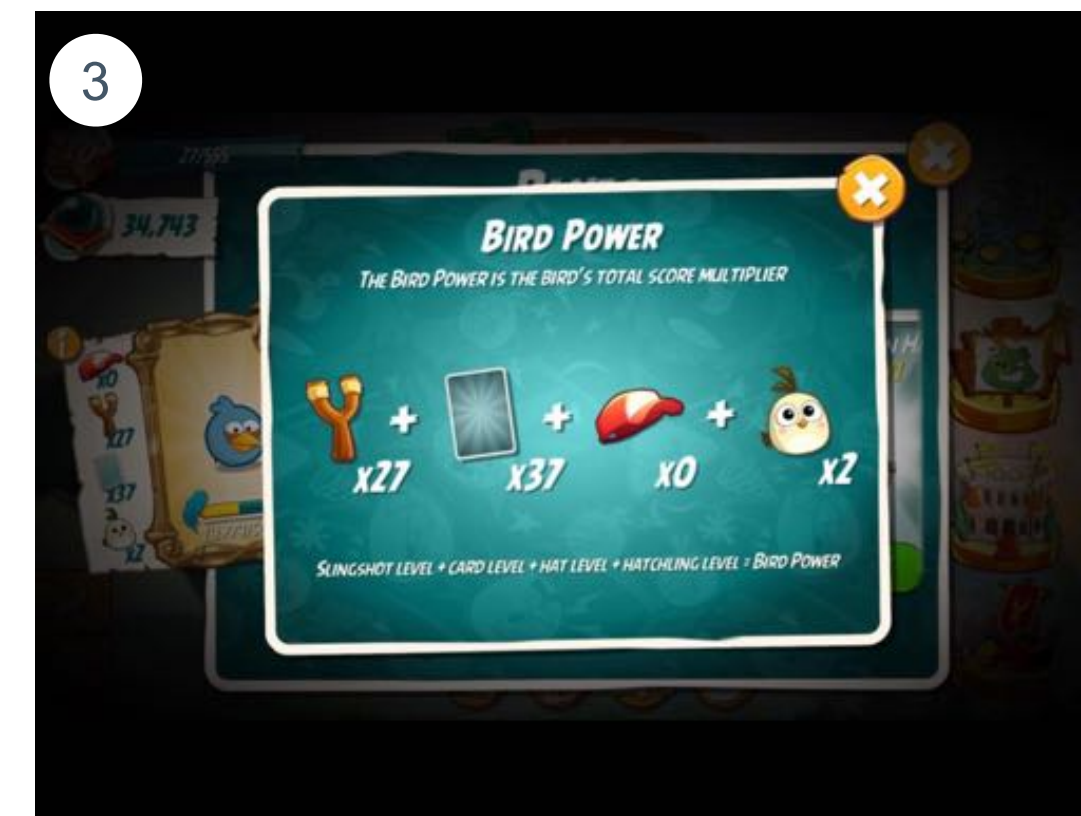
COLLECTION TOURNAMENTS

FEATURE SNAPSHOT

Tournament features are surfacing as both mid-game and end-game unlocks to stimulate competitive players

Additional Information
- Star Tournament – Toon Blast
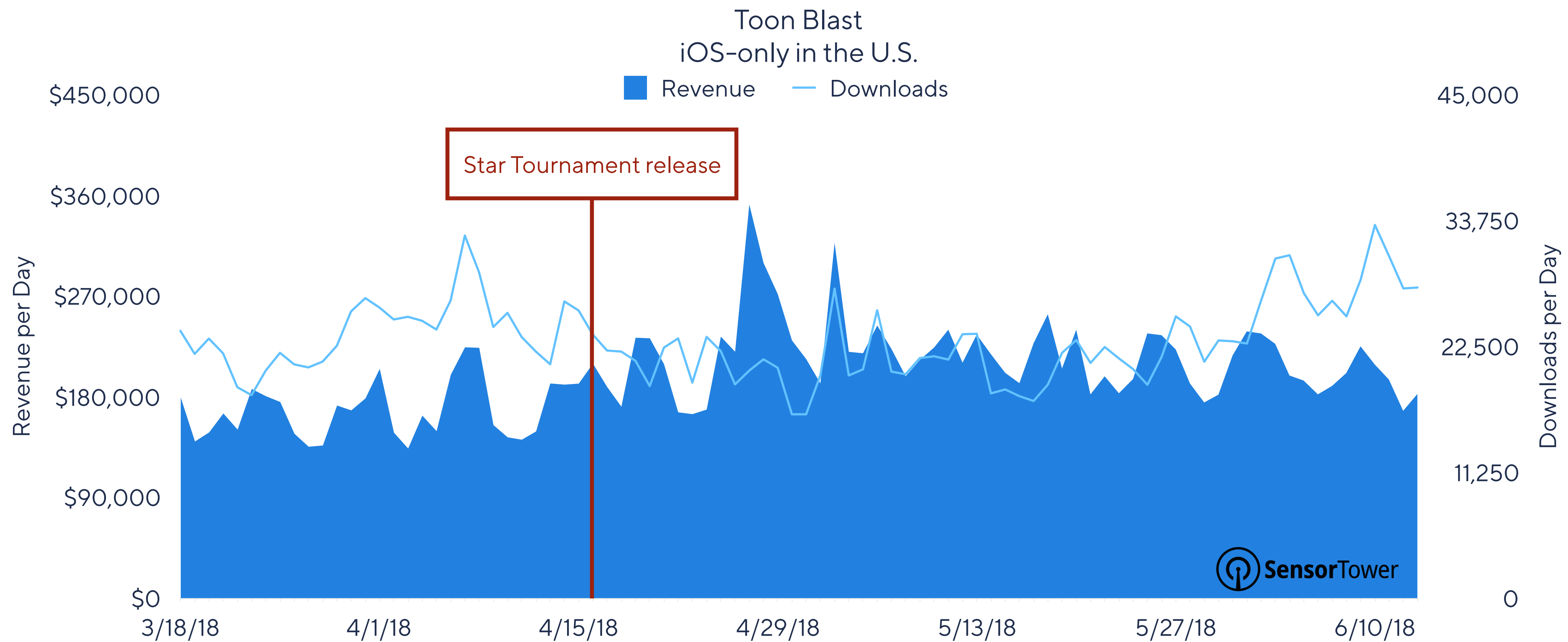- Release: 4/16/18
- Target Player: Mercenary

Related Features
- Tournaments – Solitaire TriPeaks
- Return of Tour De Pop – Panda Pop
- Champions League – Toon Blast

Impact	▰▰▰▱▱
Longevity	▰▰▰▰▱
Repeatability	▰▰▰▰▱
Skinnability	▰▱▱▱▱
Cost	▰▰▰▰▱

IMPACT ANALYSIS

Revenue increased by 12% WoW and 27% Wo2W in Toon Blast following the release of *Star Tournament*

Toon Blast
iOS-only in the U.S.

■ Revenue   — Downloads

Star Tournament release

$450,000
$360,000
$270,000
$180,000
$90,000
$0

Revenue per Day

45,000
33,750
22,500
11,250
0

Downloads per Day

3/18/18   4/1/18   4/15/18   4/29/18   5/13/18   5/27/18   6/10/18

SensorTower

FEATURE INSIGHTS

To keep players engaged in a competitive feature, use backend logic to create the *appropriate level* of competition

Feature Details
- Qualified players who complete a level join a 50-player group (1)
- Groups complete levels to collect stars for scores and leaderboard ranks (2 & 3)
- Prizes are based on leaderboard final rankings: 1st–3rd win coins and 4th–10th win boosts (4)
- Stars collected during a tournament also fill the *Star Chest* meter (5)

Key Takeaways
- Having small groups of players at similar levels is a key aspect of tournament design
- If you place a high-value player into a group that is too competitive, they may lose dramatically. This will likely soften revenue by discouraging entrants
- Be careful not to force your players into competition. Many Puzzle players, by nature, do not want to be competitive. To mitigate this risk, consider an opt-out option
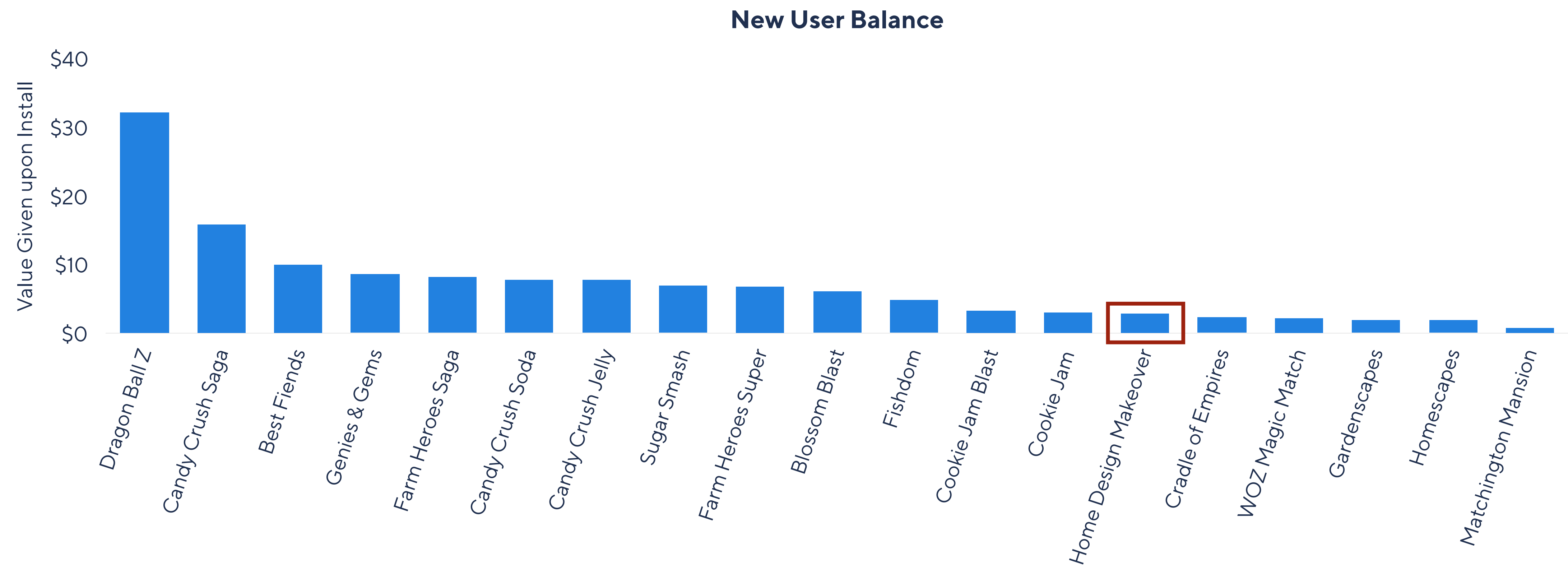



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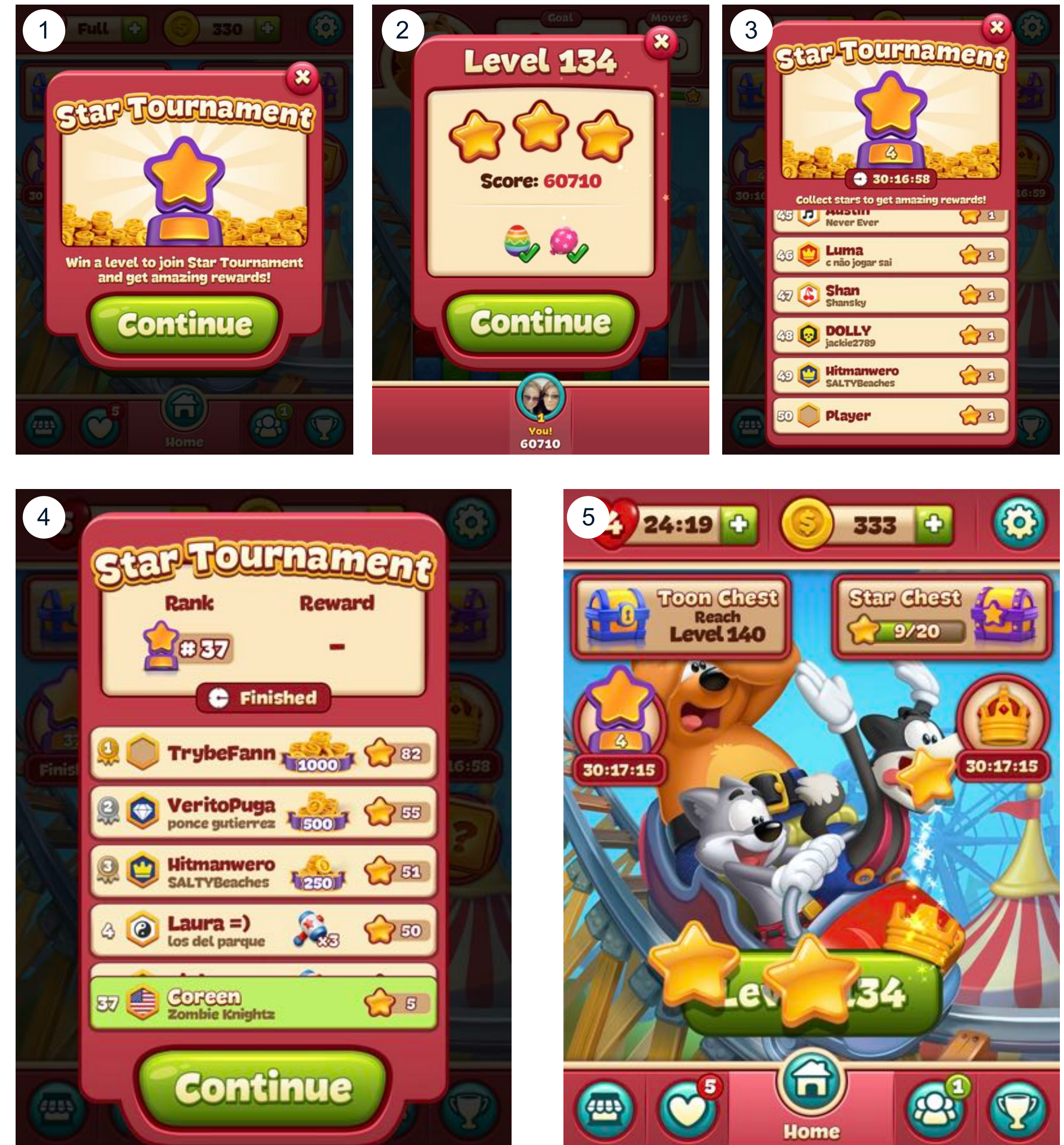
ECONOMY TEARDOWN:
HOME DESIGN MAKEOVER

NEW USER BALANCE

Home Design Makeover has tuned their new user balance looser than their closest competitors: Homescapes, Gardenscapes, and Matchington Mansion. However, their overall new user balance is still low

New User Balance

Value Given upon Install

X-axis categories: Dragon Ball Z, Candy Crush Saga, Best Fiends, Genies & Gems, Farm Heroes Saga, Candy Crush Soda, Candy Crush Jelly, Sugar Smash, Farm Heroes Super, Blossom Blast, Fishdom, Cookie Jam Blast, Cookie Jam, Home Design Makeover, Cradle of Empires, WOZ Magic Match, Gardenscapes, Homescapes, Matchington Mansion

Y-axis: $0, $10, $20, $30, $40

DAILY VALUE

Home Design Makeover is tuned extremely tight, with only one retention feature: energy. Compared to competitors, HDM offers players a limited number of purchase options: 1) primary currency, 2) energy, and 3) three boosts at level 14

Daily Value (less W2E)

18
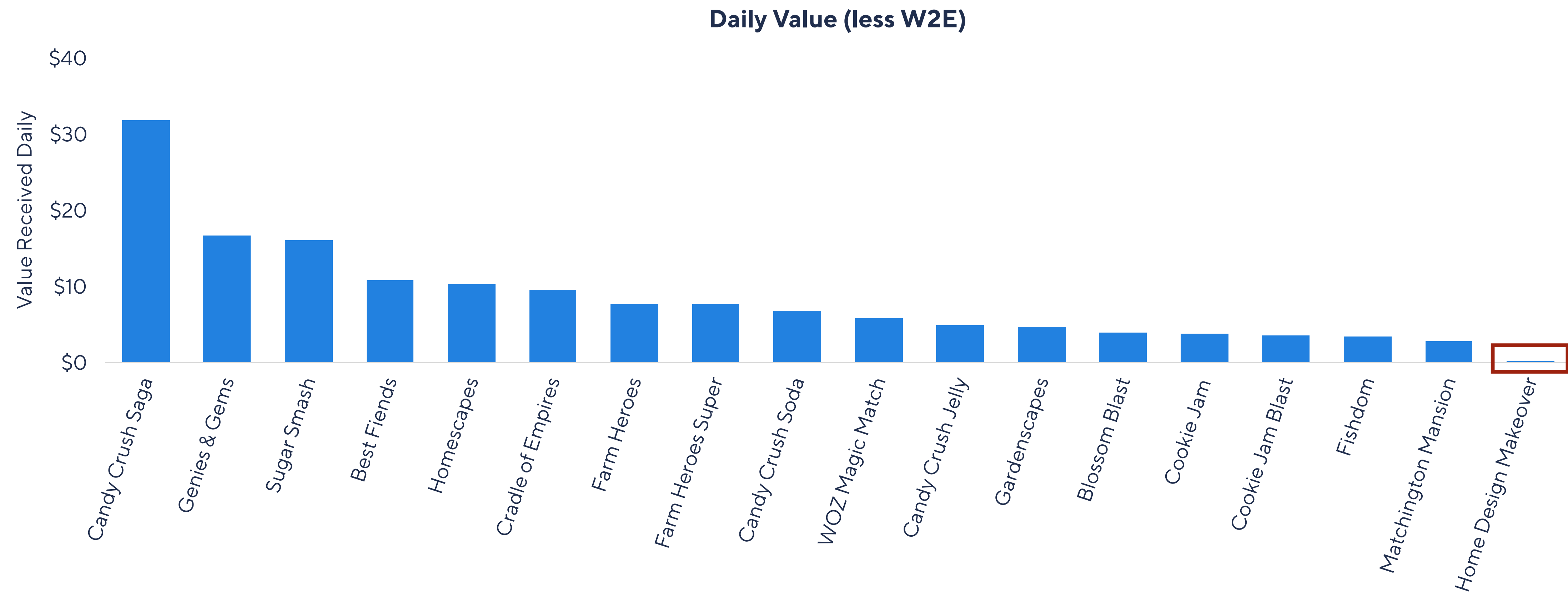
CURRENCY CONVERSION

Home Design Makeover deflated their early economy, relative to their closest competitors. This leaves room for level-based inflation later in the game

Primary Currency Conversion
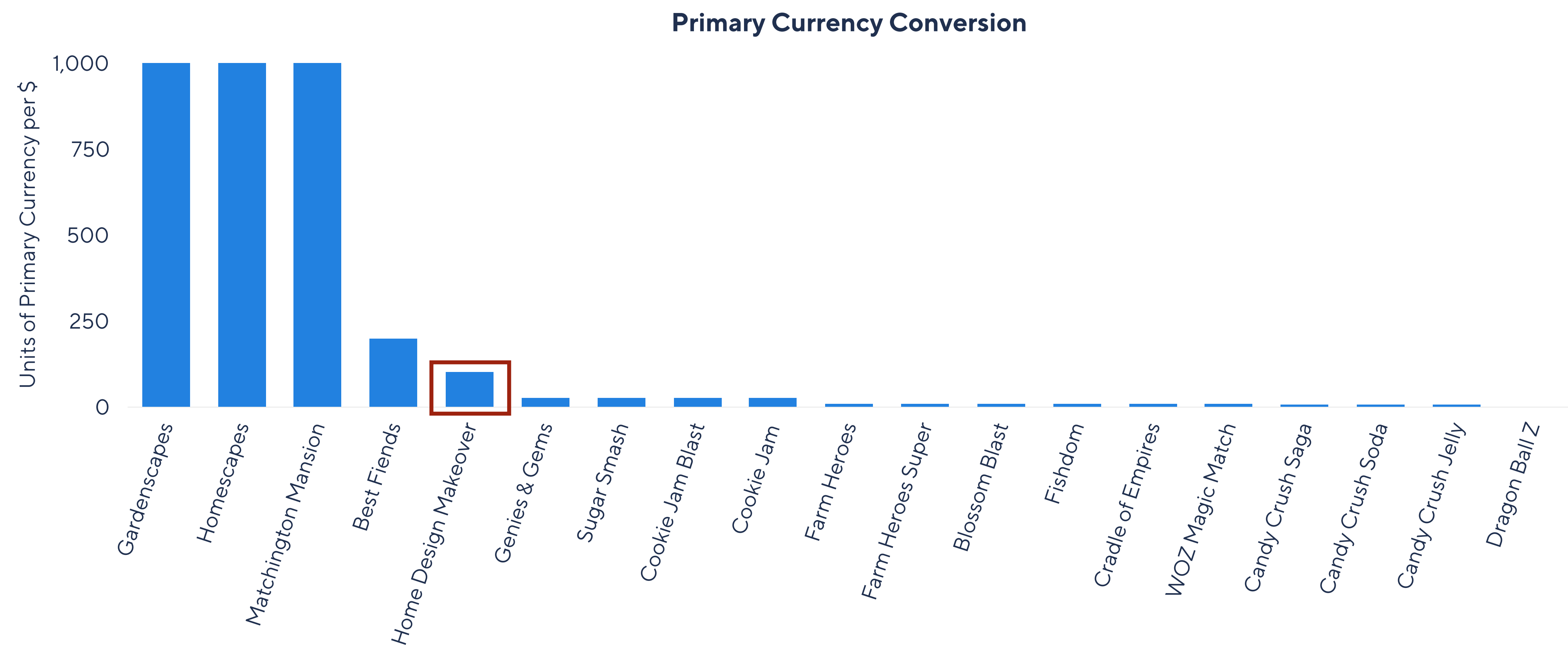
Click here to download the full Puzzle Economy Analysis

LEVEL DESIGN

NEW LEVEL DESIGNS

Window Blind in Toy Blast:
- Cube coverings must be removed by adjacent matches before they can be popped (1 & 2)

Gas Cylinder in Gardenscapes:
- *Gas Cylinders* limit the number of available moves. Adjacent matches and boosts detonate (and remove) *Gas Cylinders*. *Frozen* and *Chained Cylinders* are immobile (3 & 4)
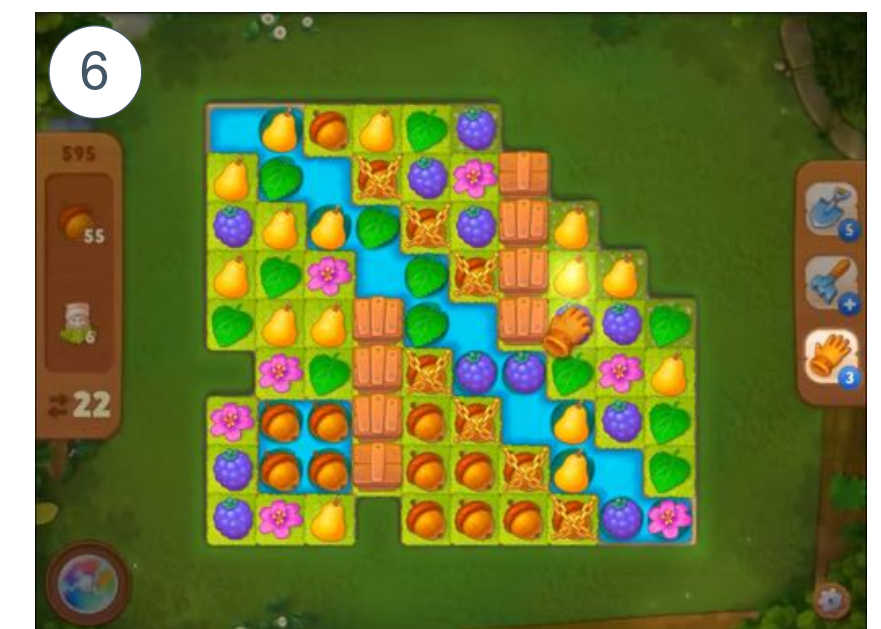
Gardening Glove in Gardenscapes:
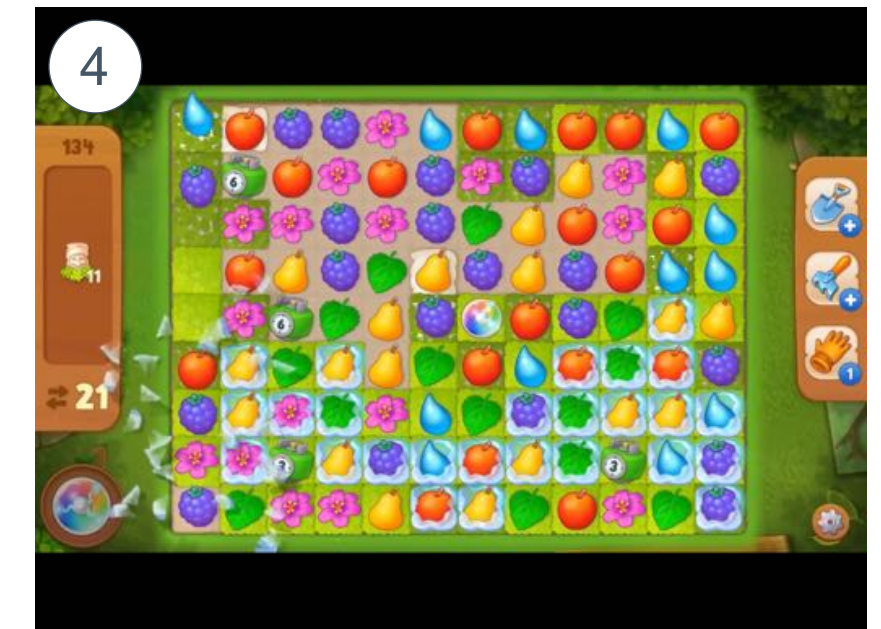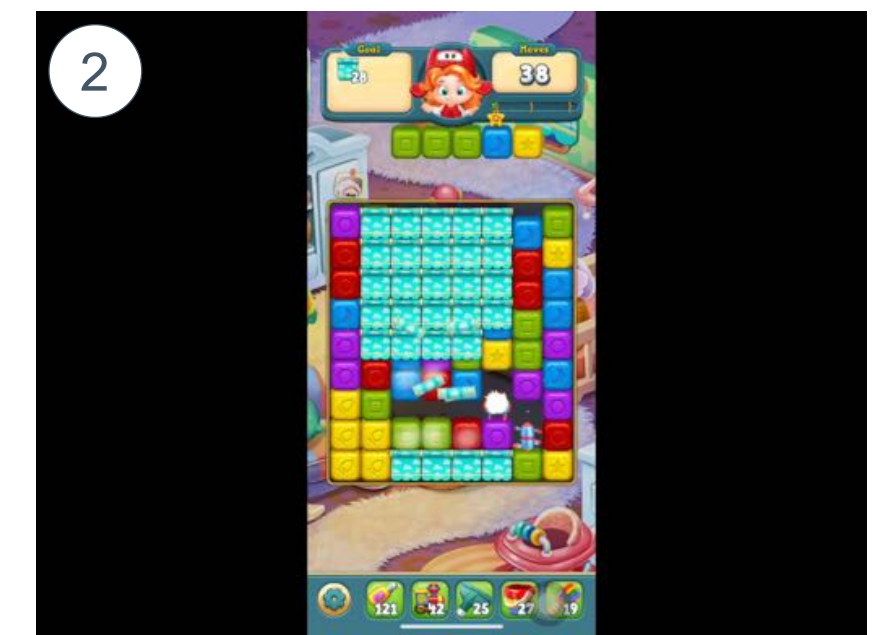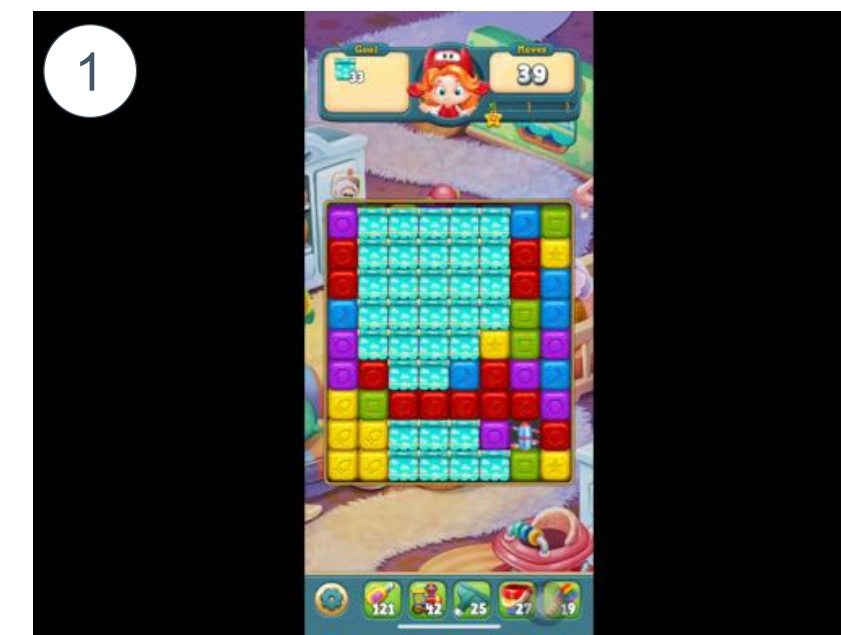- Tapping a *Gardening Glove* lets a player swap any 2 movable elements without using a move (5 & 6)

Waffles in Candy Crush Saga:
- Adjacent matches remove a *Waffle* layer. *Waffles* fall when matches are made under them (7 & 8)

Coconut in Toon Blast:
- Boosters crack *Coconuts*. Then, adjacent popped cubes remove *Coconuts* from the board

MARKET WATCH

5/1/18 – 5/31/18

NOTABLE RELEASES I

App	Notable Release	More Information
Candy Crush Saga	Google Play Instant	Google Play Store users can choose to play a sample of the game before downloading (1)
Candy Crush Jelly Saga	Golden Pin	If a level is completed on the first attempt, a *Golden Pin* is awarded
Cookie Jam	Sweet Scratchers	Players complete milestones and events to earn *Scratcher Cards* (2)
	Daily Spinner Odds Disclosure	Players are provided stated odds of the daily bonus
	Unlimited Boosters	Event that awards boosters, which activate before each level until the timer runs out (3)
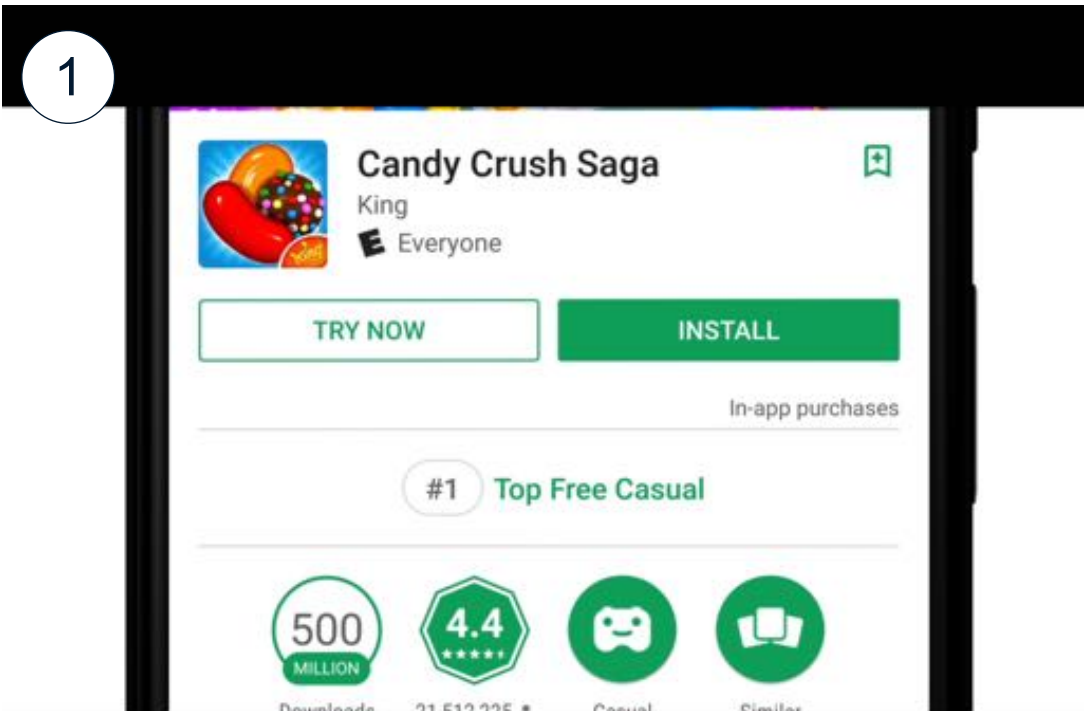
NOTABLE RELEASES II

App	Notable Release	More Information
Farm Heroes Saga	Booster Trail	A streak feature awards boosters to player's inventory and their next level of play (1)
Bubble Witch 3 Saga	Cauldron Classic II	Players complete levels in a competition to become an in-app character and win currency
Homescapes	Tournaments	Announcement of *Tournaments* with leaderboard coming soon (2)
Family Guy: AFMG	All My Illegitimate Children	Players complete event levels to collect *DNA Strands* and fill a meter. A post-level double down gamble option gives 2x *DNA Strands* for completing another level (3)

Click here for the full list of content released this month
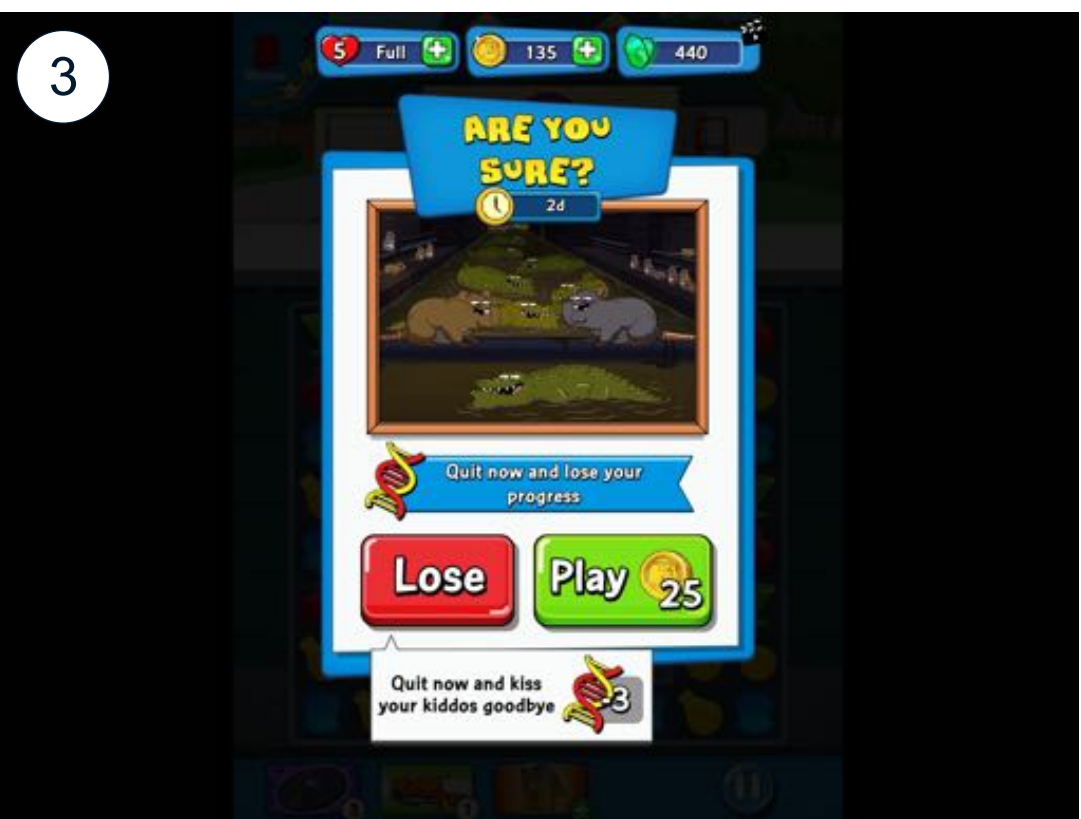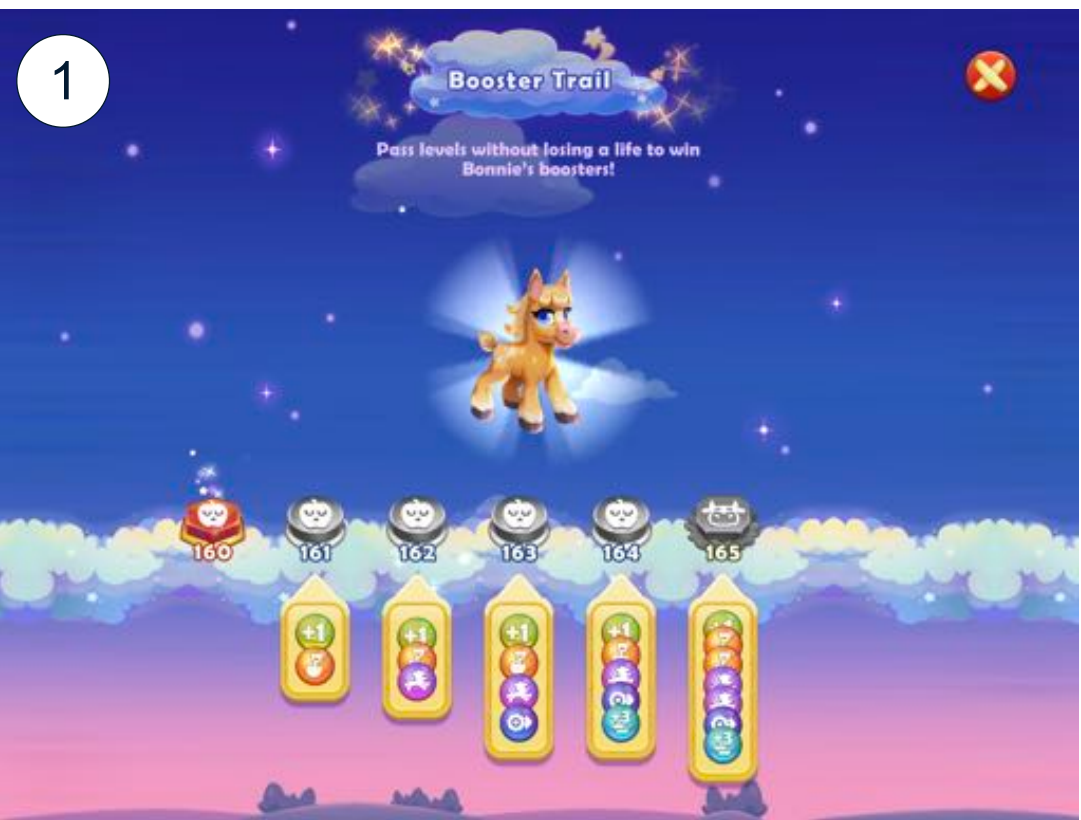
APPENDIX

PUZZLE PERSONAS

	Mercenary	Companion	Commander	Adventurer	Explorer	Daredevil	Patterner
Gender	76% male	72% female	73% male	55% male	78% female	69% male	71% female
Mean age	31.6	40.8	37.8	31.5	42.3	39.6	45.3
Highest preference(s)	Assault	Care	Manage	Journey & Assault	Journey	Assault	Coordinate
Lowest preference(s)	Care	Assault	Care	Manage & Care	Assault	Journey & Care	All except Coordinate
Gameplay mechanic LIKES	Stealth, strategy, being the protagonist, skill progression, and exploration	Befriending non-playable characters (NPCs), creating an avatar, skill progression, and city or village handling	Strategy, city or base construction, and large-scale handling of NPCs	Creating an avatar, skill progression, being the protagonist, exploration and secrets, and befriending NPCs	Collecting rare items and treasures, exploration, skill progression, and tile matching	Racing, explosions, and stealth	Tile matching, platforming, and collecting rare items
Gameplay mechanic DISLIKES	Rhythm mechanics, and pet training	Killing, war, weaponry, and explosions	Theft, illegal activities, stealth, retreating, and rhythm mechanics	Racing, sports, tile matching, instruments, dancing, and pet training	Theft, explosions, and retreating	No strong dislike for any particular mechanic	Killing, theft, destruction, and war

Data adapted from Vahlo, Kaakinen, Holm, and Koponen. "Digital Game Dynamics Preferences and Player Types," *Journal of Computer-Mediated Communication.* 2017

DATA COLLECTION PROCESS

Recommendations, information, and data come from market research, app intelligence tools, and deep analysis 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's 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

"It takes 20 years to build a reputation and five minutes to ruin it. If you think about that, you'll do things differently."

– Warren Buffett

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