LIQUID&GRIT

Puzzle Report

Competitive Research and Actionable Product Recommendations
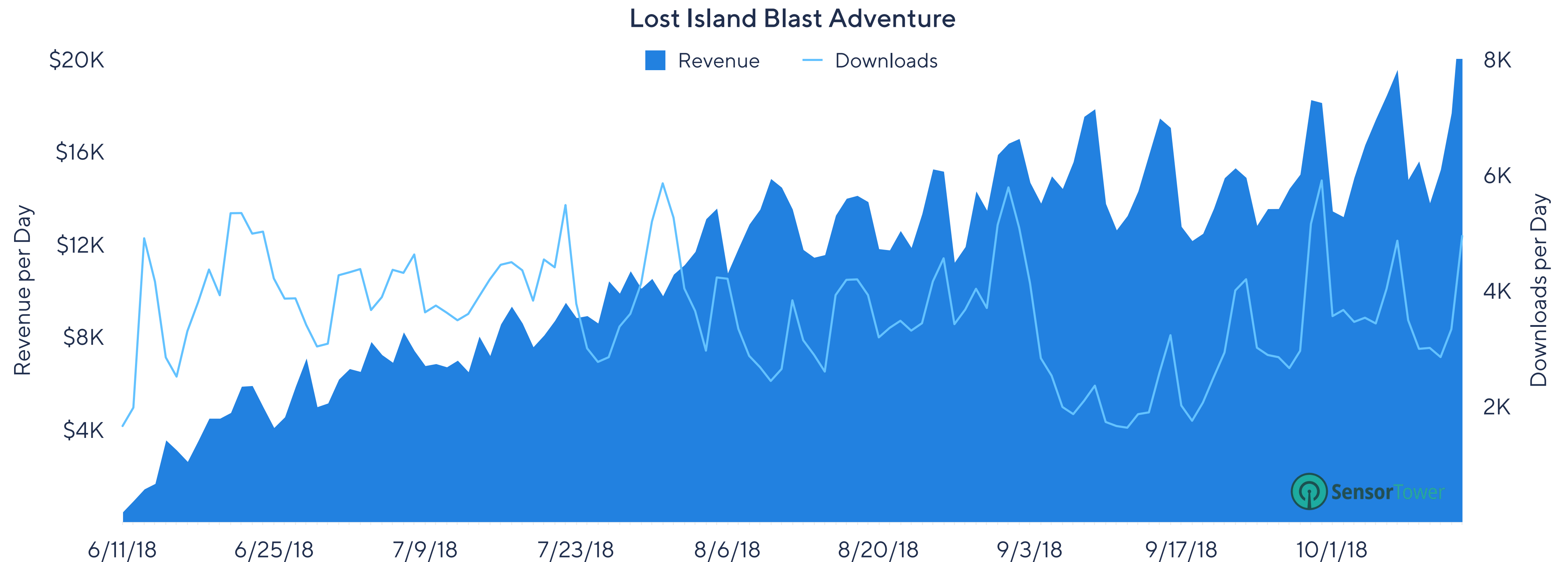
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OCTOBER

2018

BREAKOUT APPS

LOST ISLAND BLAST ADVENTURE

Plarium's newest app combines collapse-build level mechanics (similar to Toon Blast) with a custom design meta-game (similar to Homescapes)

Players enter an island-based story and world with characters. Players proceed to customize the island with items they earn by completing quests. Quests are accomplished by earning stars … and stars are awarded by finishing levels

Feature Details
- New User Flow
- Misc. Features
- Currency
- Quests (custom design)
- Daily Bonus
- Watch to Earn

Lost Island Blast Adventure

■ Revenue — Downloads

Revenue per Day axis: $4K, $8K, $12K, $16K, $20K

Downloads per Day axis: 2K, 4K, 6K, 8K

X-axis: 6/11/18, 6/25/18, 7/9/18, 7/23/18, 8/6/18, 8/20/18, 9/3/18, 9/17/18, 10/1/18
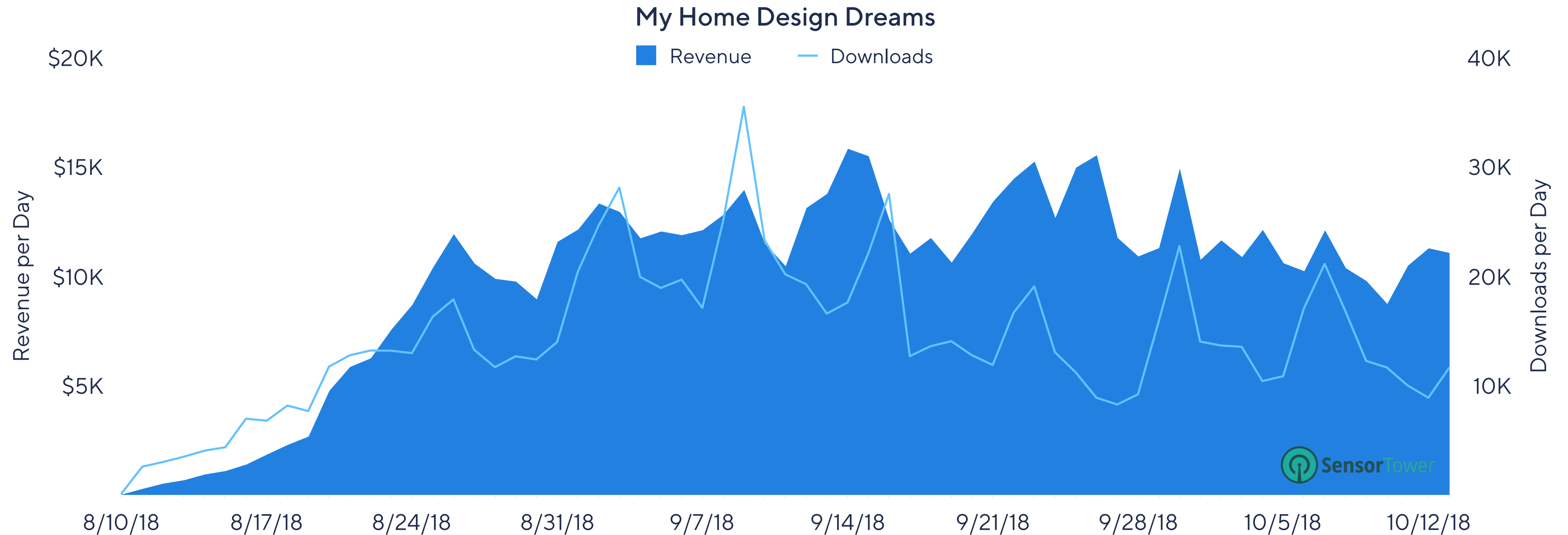
SensorTower

Graph data is iOS U.S. only

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MY HOME DESIGN DREAMS

Zenjoy Limited's new app is story and decoration-based that lets players choose how the decorations unfold in an Episodes-like format. The level mechanics are match-3

Players enter the game as a female recent graduate who just moved to the big city. Players decorate rooms to earn *Style Points*. Standard furniture is bought with coins and lavish furniture is purchased with cash or unlocked with a login streak. Like Episodes, players decide how the storyline evolves

My Home Design Dreams

Graph data is iOS U.S. only

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REVENUE DRIVERS

TEAM COLLECTION EVENTS

IMPACT ANALYSIS

Gardenscapes drove a 25% WoW short-term spike in revenue after the *Bumper Crop* event release. *Bumper Crop* triggers the desire to achieve for Prospecting Polly player types

Gardenscapes

■ Revenue — Downloads

Bumper Crop

Revenue per Day: $300K, $250K, $200K, $150K, $100K, $50K

Downloads per Day: 10K, 8K, 6K, 4K, 2K

7/18/18, 7/25/18, 8/1/18, 8/8/18, 8/15/18, 8/22/18, 8/29/18, 9/5/18, 9/12/18, 9/19/18, 9/26/18, 10/3/18, 10/10/18

SensorTower

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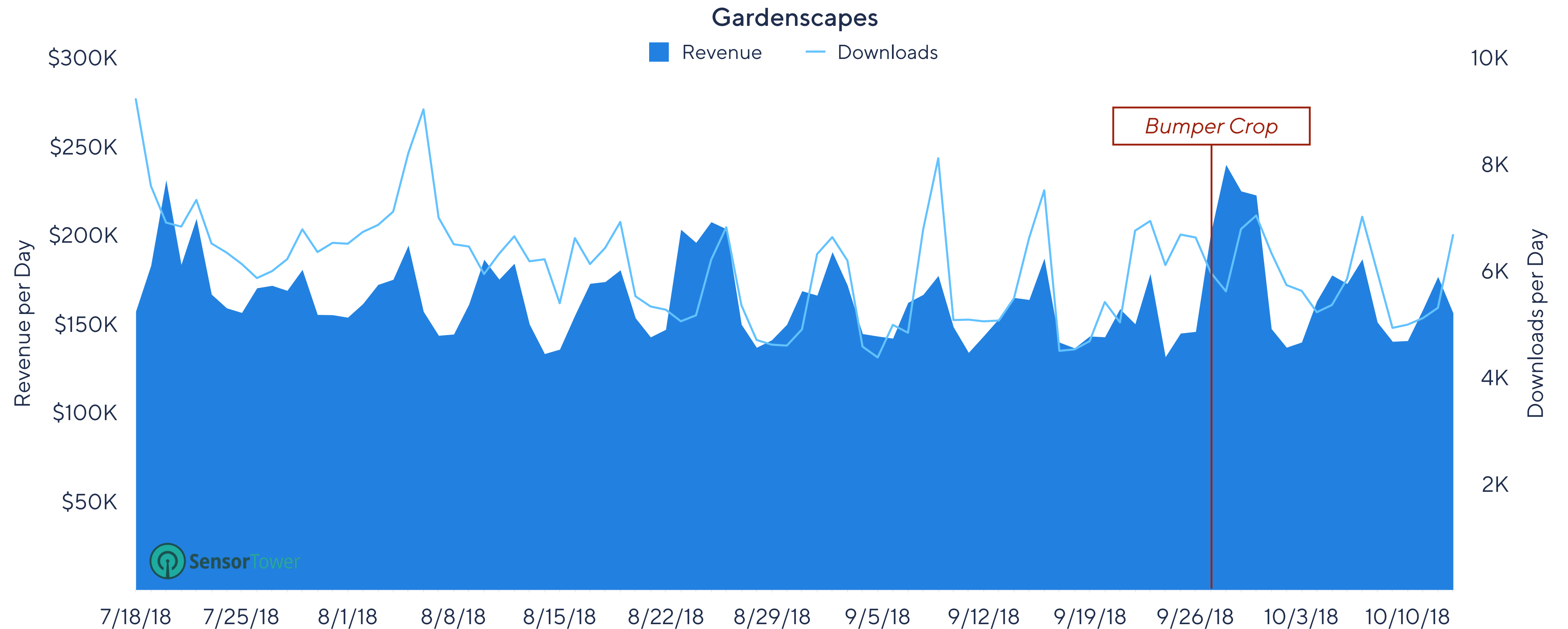
INSIGHTS & ADVICE

Release a new special package with a level-based collection system to drive revenue while maintaining a healthy economy. Align the collection system with level-completion goals to eliminate moments of ire

Feature Details

- Players collect *Apples* to unlock a group event and 30 minutes of unlimited lives (1 & 2)
- A meter, community goals, and rewards sit on the top of the leaderboard (3)
- All *Apples* collected by players contribute to a community goal (4)
- The *Bumper Crop* events are tied to *Leagues* (5)
- The initial event launch included two *Special Offers* of bundled packages (6)

Key Takeaways

- <u>Consider making the collection item carry over multiple levels so the task does not conflict with level completion goals</u>. While this may weaken the event's ability to sink currency, it will eliminate negative moments associated with collecting all the items but ultimately failing a level
- To achieve the same end result of sinking currency with a secondary collection system, <u>consider rewarding players with objects outside of the level, like the *Star Tournament* system in Toon Blast</u> ... where completing levels themselves awards the item
- <u>If the collection system must be integrated into the level design, evaluate triggering the collection item within a tile or boost</u>. This evokes positive feelings for both completing a level and collecting the items
- <u>Be careful about randomly grouping players</u>. Highly-engaged players may become annoyed in groups with less-engaged players. Opt-in systems or strong matching systems eliminate this risk

Click here for more images and videos

FEATURE REFERENCES

A closely-related feature in Toon Blast, *Team Tournaments,* drove a sustained 9% revenue increase. Review the August 2018 Puzzle Report for details

Report References
- Team Tournaments – August 2018 Puzzle Report
- Team Battles – September 2017 Puzzle Report
- Team Events – October 2017 Product Report

Related Features
- Team Tournaments – Toon Blast
- Team Battle – Wizard of Oz Magic Match
- Follow the Yellow Brick Road Team – Wizard of Oz Slots

Ask Us a Follow-Up Question

REMOVED FEATURES

MOVE COUNTDOWNS & TIMED LEVELS

Cookie Jam removed *Move Countdown* level elements. Back in April, Candy Crush Saga and Gardenscapes eliminated *Countdown Timer* level elements. Players seemed to have negative reactions to these new elements due to added level difficulty

Feature Details
- Cookie Jam announced the removal of the *Move Countdown* level elements on the community page. These elements were included in 'Timer Levels' (1)
- *Move Countdown* elements counted down every move (2)
- Players had to remove a *Move Countdown* element with boosts or similar-color matches (3)
- Failing to remove the *Move Countdown* before it reached zero resulted in a failed level

More Information
- Timer Removal – Cookie Jam
- Timed Levels – Gardenscapes
- Time Levels – Candy Crush Saga

Candy Crush Q&A Page Response on *Timed Levels*

A lot of the timed levels were removed after Facebook groups asked for thoughts on the timed levels. Quite a few responses came back relating to difficulty with these levels ... so King listened

LEVEL DESIGNS

NEW LEVEL DESIGNS I

Our Level Design Expert provided analysis and advice on the most innovative level design mechanics released

Extra Moves Candy **in Candy Crush Saga**

- Displays the number of extra moves awarded to players when included in color matches, and replaces Extra Time Candy, which appeared in *Timed Levels* (1 & 2)

> **Design Expert Insights:** Designers can use this mechanic to either 1) help the user complete a hard level, 2) distract the user by embedding it in hard-to-reach areas, or 3) increase the thrill of a level with more *almost-failing-the-level* moments. Consider testing variations with a wider range of added moves (1–7) and activating with multiple layers

Ribbons **in Candy Crush Saga**

- Green, purple, and blue *Candies* appear wrapped with bronze, silver, and gold *Ribbons*. Color matches including *Ribbons*, or boost activation, unwrap the *Ribbons* … converting the *Candies* to boosters (3 & 4)

Colored Box Upgrade **in Gardenscapes**

- An upgrade to the Colored Box, requiring an extra adjacent color match in order to be removed from the board (5 & 6)

NEW LEVEL DESIGNS II

Sacks of Ivy in Gardenscapes

- *Sacks of Ivy* hazards are removed from the board by two adjacent matches or boost activations. Upon removal, Ivy spreads onto surrounding tiles (1 & 2)

Coolers in Gardenscapes

- *Coolers* contain Ice and freeze random elements on the board when triggered by adjacent matches or boosters. After *Coolers* run out of *Ice*, they are removed from the board (3 & 4)

Double Goals Blanket in Gardenscapes

- Additional goals are added to the Picnic Blanket, requiring two collection goals to complete in order to open additional play area (5 & 6)

> **Design Expert Insights:** While *Double Goals Blanket* isn't completely new, it is a nice twist. For designers, this mechanic is a good instrument to create harder obstacles by either 1) increasing the number of collectible goals, or 2) placing the *Blanket* in hard-to-reach locations. It is also a nice way to hide some powerful benefits, like *Supers,* that will surprise and delight players when uncovered

NEW LEVEL DESIGNS III

Gramophone in Homescapes

- When triggered by three adjacent matches, *Gramophones* cause *Notes* to appear on random pieces. Each piece displaying a *Note* will change color every move (1 & 2)

> **Design Expert Insights:** This feels like a very new and interesting mechanic; the idea to generate *Notes* that change colors of tiles seems unusual
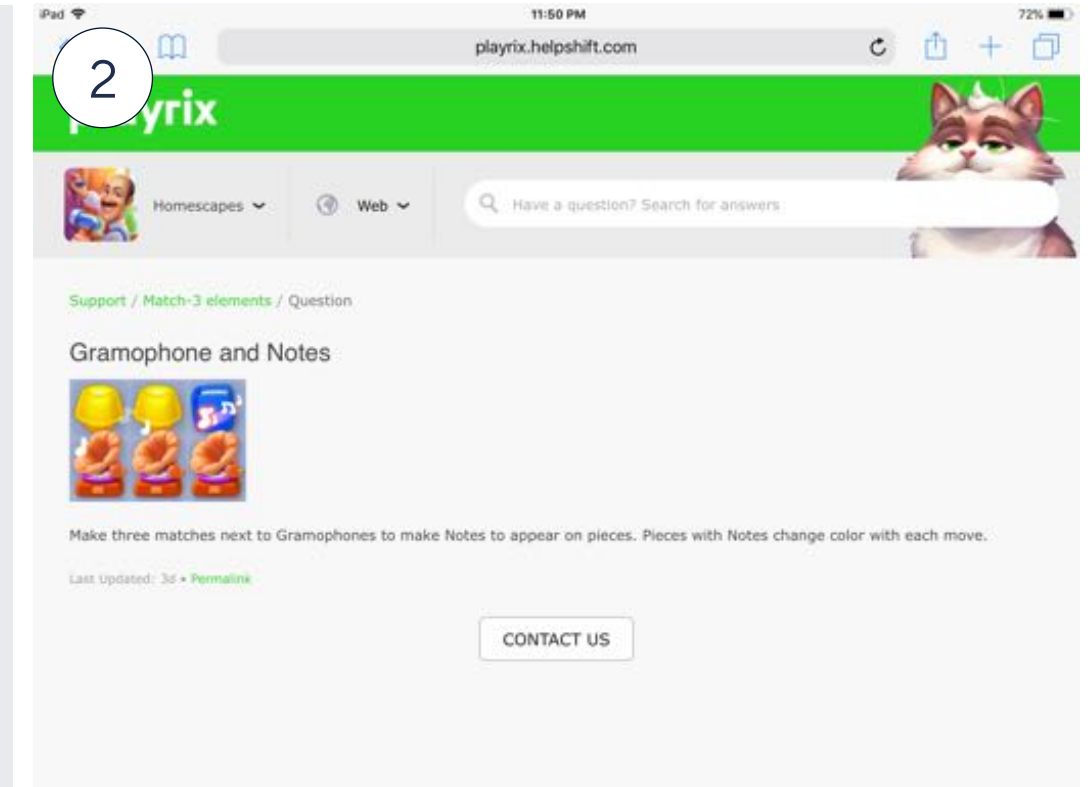
Chain in Toon Blast

- The *Chain* hazard covers portions of the board and is only removed by boost activation. Once removed, additional cubes fill the cleared play areas (3 & 4)

> **Design Expert Insights:** Although the visual design works well to describe the element, the system can only be placed at the top rows due to the top bar. This design choice restricts the impact of the element. Consider experimenting with different size *Chains* to produce a more interesting challenge for players to break

Cannon in Best Fiends

- The *Cannon* is charged by three adjacent link-matches. Firing a shot clears a row or column of elements. *Cannons* charge and fire instantly if struck by another *Cannon's* shot (5 & 6)

MARKET WATCH

9/1/18 – 9/30/18

NOTABLE RELEASES I

App	Feature	Description
Candy Crush Saga	Nightmarishly Hard Levels	Additional tier of levels added to *Episodes,* each containing 1–5 *Nightmarishly Hard Levels* (1)
Solitaire TriPeaks	Treasure Match	[In testing] A *Memory Match* timed event for players to complete levels and progress along a map (2)
Candy Crush Jelly Saga	Jellyficent Offer	Players collect *Tickets* by successfully finishing *Hard* and *Super Hard* levels, filling a meter and unlocking a special purchase offer (also seen in Candy Crush Soda Saga Golden Tickets and Pet Rescue Saga 4 Hard Levels Offer) (3)
Panda Pop	VIP Mode	Players who have completed all levels are able to play any level during events (Panda Pop's end-of-level feature)
	Landscape Mode Disabled	Only portrait mode available for play

NOTABLE RELEASES II

App	Feature	Description
Best Fiends	Baby Slug's Big Day Out	A quest system with three tasks each, and two fill meter challenges. The final task is to watch the new animation video Bably Slug's Big Day Out (1)
Cookie Jam	Piggy Bank	*Piggy Bank* feature released (2)
Farm Heroes Saga	Golden Trophies	Players win *Golden Pins* for beating levels on the first try. Collecting enough *Pins* in an *Episode* awards *Trophies* (also seen in Candy Crush Saga Gold Trophy) (3)
Wizard of Oz Magic Match	Land of Oz Legends	Exclusive content is now available to players who complete all of the map levels. The end-of-level content includes endless *Legends Levels* with leaderboards and weekly rewards

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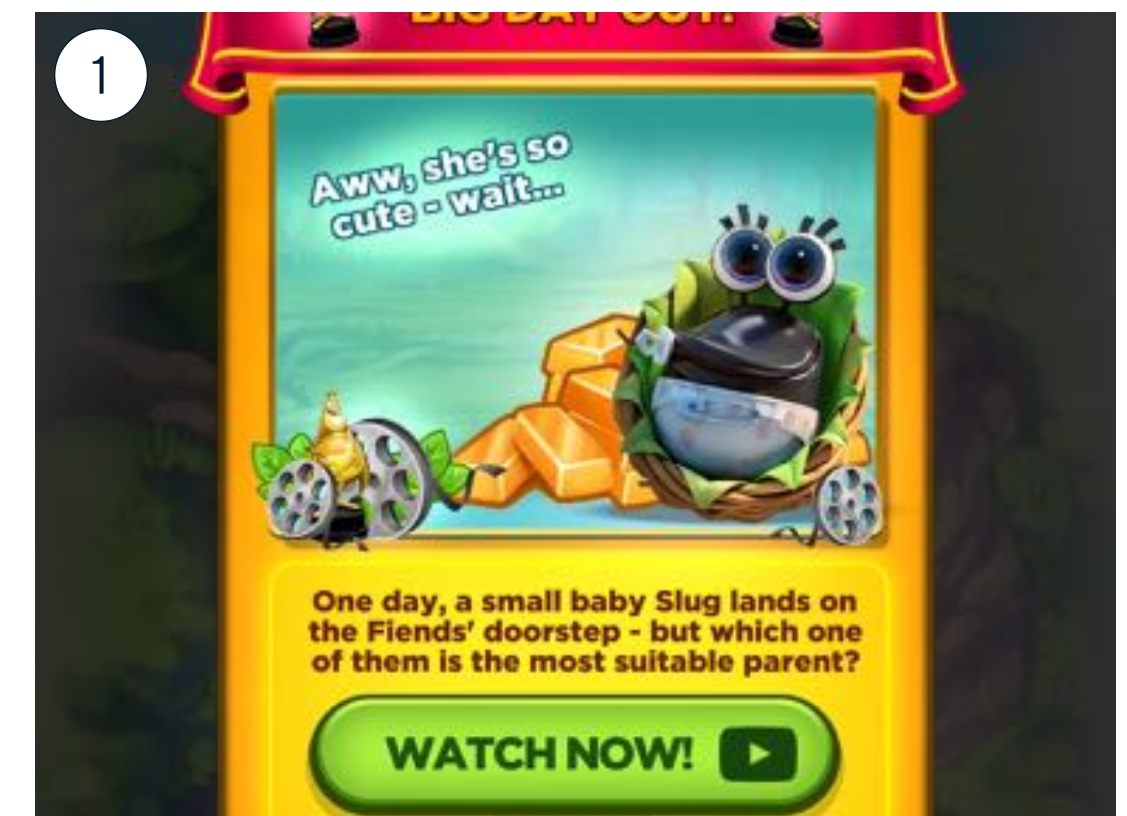
APPENDIX

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 Jobs to be Done framework

To create new innovations, focus on the emotional jobs that people want to 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.

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

PUZZLE PERSONAS

	Stealthy Steve	Friendly Fran	Destructive Derek	Adventuring Adrian	Prospecting Polly	Daring Dan	Gathering Grace
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 and Manage	Manage	Journey	Journey and Coordinate	Assault and Coordinate	Coordinate
Lowest preference(s)	Care	Assault	Care	Manage and Care	Assault and Care	Journey and Care	All except Coordinate
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
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 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

"All our dreams can come true, if we have the courage to pursue them."

– Walt Disney

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