LIQUID&GRIT

Puzzle Report

Competitive Research and Actionable Product Recommendations
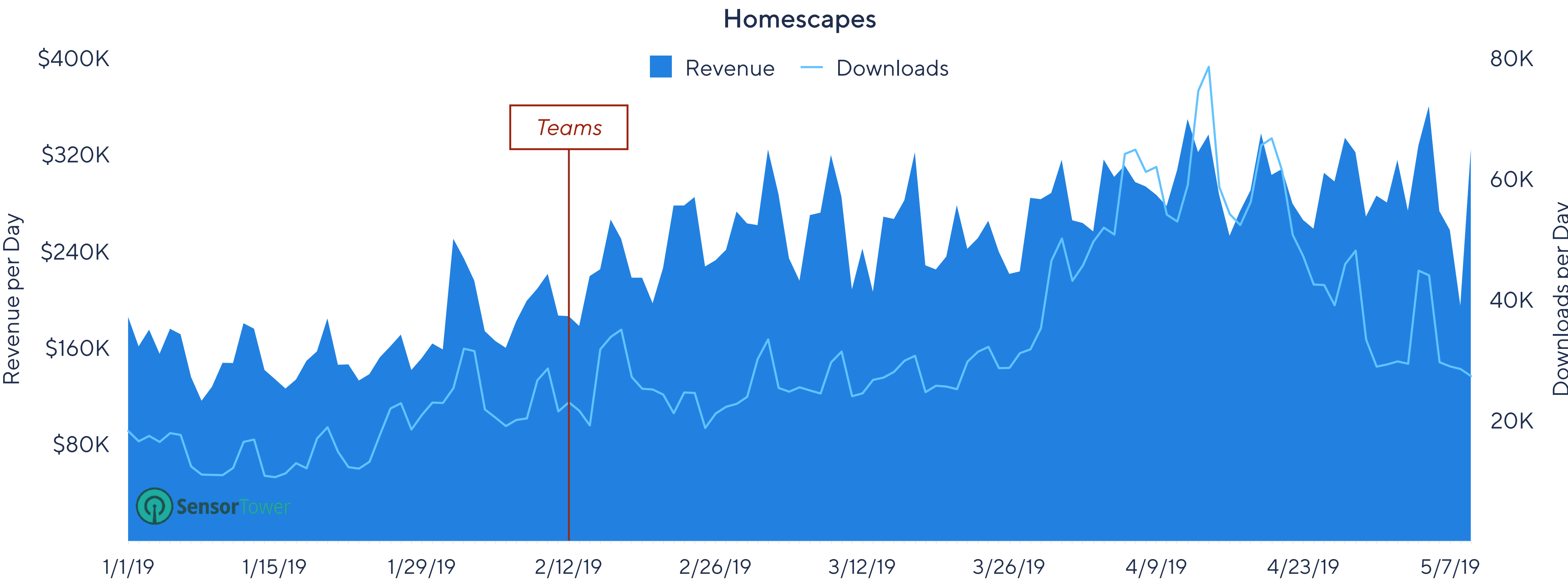
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MAY

2019

REVENUE DRIVERS

CLUB FEATURES

Teams in Homescapes

REVENUE ANALYSIS

Club Features that enable *sharing lives* is driving revenue in Puzzle. Revenue was +25% WoW after Homescapes released a version called *Teams* (and +20% WoW when Lost Island Blast Adventure released a version called *Clubs*).

Graph data is iOS U.S. only
WoW = Week over week

FEATURE TEARDOWN

In Homescapes' version, players chat with teammates, request lives, and help other players. Teams in Homescapes is similar to Clubs in Lost Island Blast Adventure, and Teams in Toon Blast. Homescapes' differs slightly: the leaderboard displays *Team* members, their level, and their 'Help' activity.

Teams in Homescapes

Clubs in Lost Island Blast Adventure

DATA & PRODUCT INSIGHTS

Club Features with *sharing lives* are not yet widely adopted: only 10% of the top 30 Puzzle apps have *this* version of clubs. 17% of the top 30 Puzzle apps have some version of clubs. See the Puzzle Feature Matrix for a market overview of features by app. Then, use the Feature Database Library tool to see images and videos of *all* Club Features released in Puzzle.

- Companies are, however, capitalizing on this feature: 4 top apps released Clubs in 2019: Teams in Angry Birds Dream Blast (1), Clubs in Hidden Hotel: Miami Mystery (2), Clubs in Lost Island Blast Adventure, and Teams in Homescapes.

- To increase feature adoption, *do not push competition* on these group-minded players in the design. The target persona, *Escapist Emily,* wants to be social and collaborative. She *does not* like leaderboards or tournaments. Email me or watch this video for details about the L&G Puzzle Personas Report and Paper.

- Then, allocate pre-launch development to club-based events to release an event *right after the feature's launch.* For more details on the pre-launch investment shift from *features* to *features and events*, review the Club Features analysis in the 3/19 Puzzle Report.

- Add club-based packages to drive revenue, *after consistent engagement is established.* Four strong examples are Clan Chests in Angry Birds 2, Club Shop in Solitaire TriPeaks, Club Perks in DoubleU Casino, and Club Offer in Huuuge Casino.
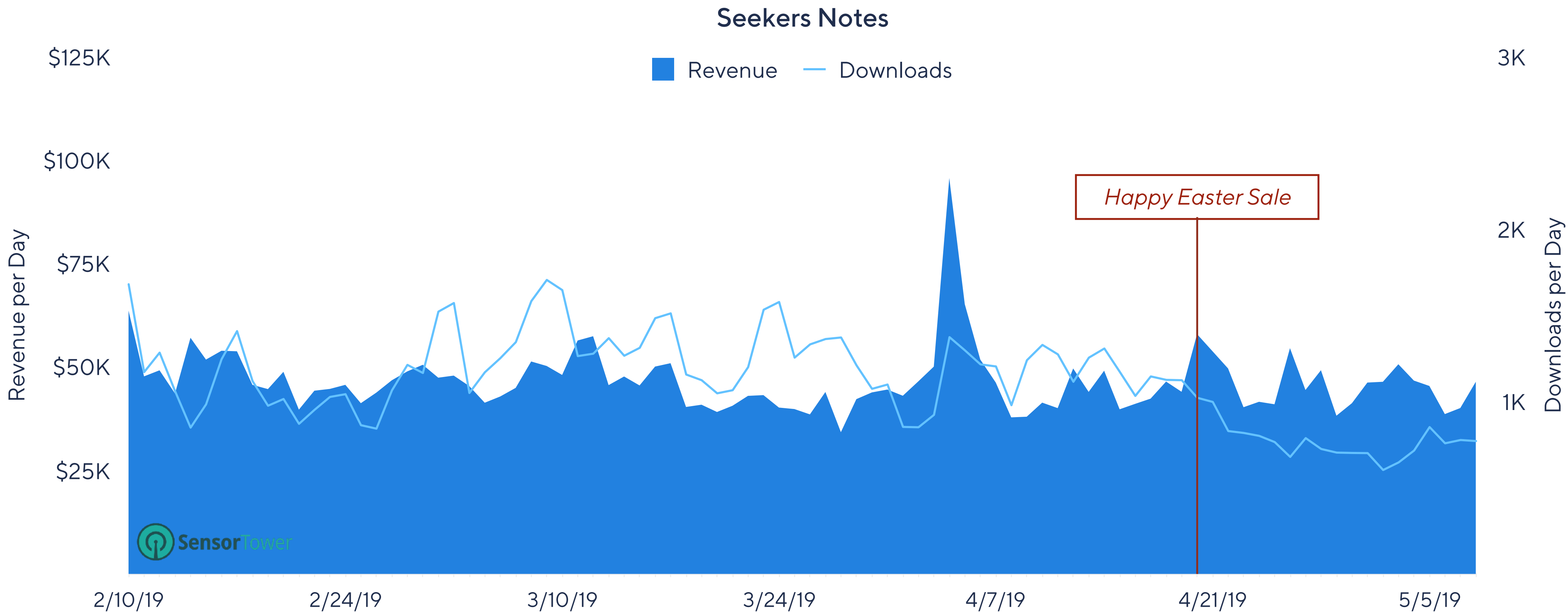
PURCHASE EVENTS

Happy Easter Sale in Seekers Notes

REVENUE ANALYSIS

Revenue was up +10% WoW, even though downloads were –28% WoW, after the launch of *Happy Easter Sale* in Seekers Notes. After the sale, revenue sustained at +7% 2Wo2W.

Seekers Notes

Graph data is iOS U.S. only
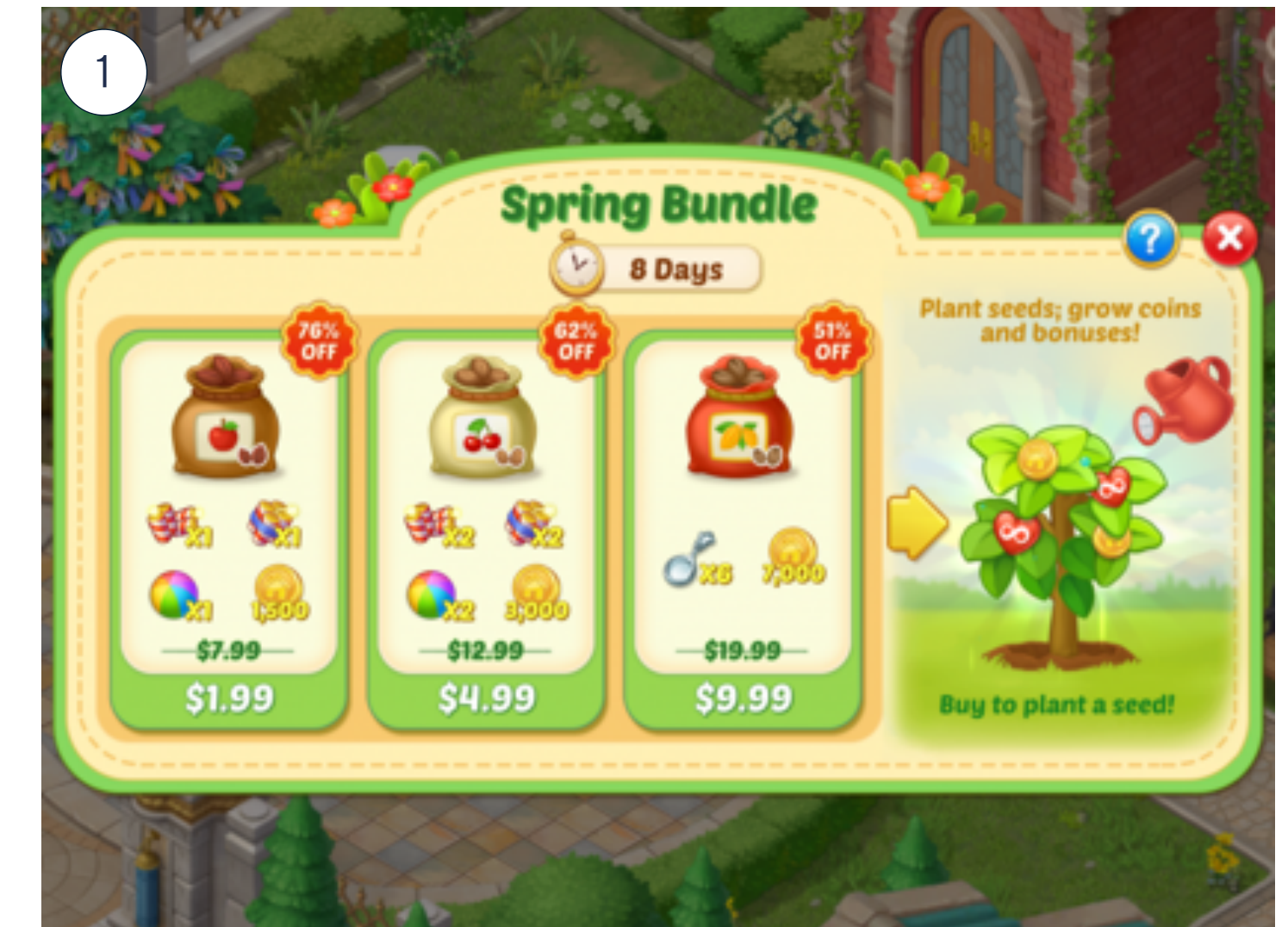WoW = Week over week and 2Wo2W = Two weeks over two weeks

FEATURE TEARDOWN

On the sales dialogue, players find hidden *Eggs* that award energy (1). Once all the *Eggs* are found, players can make a purchase to add more *Eggs* to the dialogue (2). *Eggs* collected on the free dialogue award 20 energy, and *Eggs* collected after a $1.99 purchase award 30 energy (3). See this video in the Happy Easter Sale Library.

DATA & PRODUCT INSIGHTS

Many puzzle players use puzzle games to *train their brain* ... according to our puzzle personas research (survey data from over 1,500 puzzle players). The motivation to sharpen the brain appears to be an area of opportunity for product teams. So is 'Having Fun', which is the *most* popular reason for playing puzzle games.

- The player persona *Trainer Tracy* plays most often for brain strengthening. However, she can be unsure if games are worth it ... so*, adding mind-based mechanics to the buy page* may push her to convert. Find out more about the L&G Puzzle Personas by watching this video.

- Purchase Events are driving results in multiple games. Although a different style Purchase Event, Spring Bundle in Matchington Mansion helped boost revenue +5% WoW and increase transactions (3 of the top 10 IAP transactions in the app originated from this event). For more on Matchington Mansion's Purchase Event, see the April 2019 Puzzle Report (1 & 2).

- Seekers Notes invests heavily in Purchase Events: 33% of the new events released in Seekers Notes in 2019 were Purchase Events ... a +22% increase from 2018.

- Purchase Events are up nearly 2x in Matchington Mansion this year. New Purchase Events, as a percentage of total new events released, went from 15% in 2018 to 29% in 2019. Understand app investments in Events, Features, or Content using the Feature Database Data tool.

- Gamification of the purchase flow remains one of the most under-developed areas of mobile gaming. Smaller improvements this far down in the purchase funnel can have massive shorter-term impact on revenue. Effective copy (headlines and text) will increase conversion.
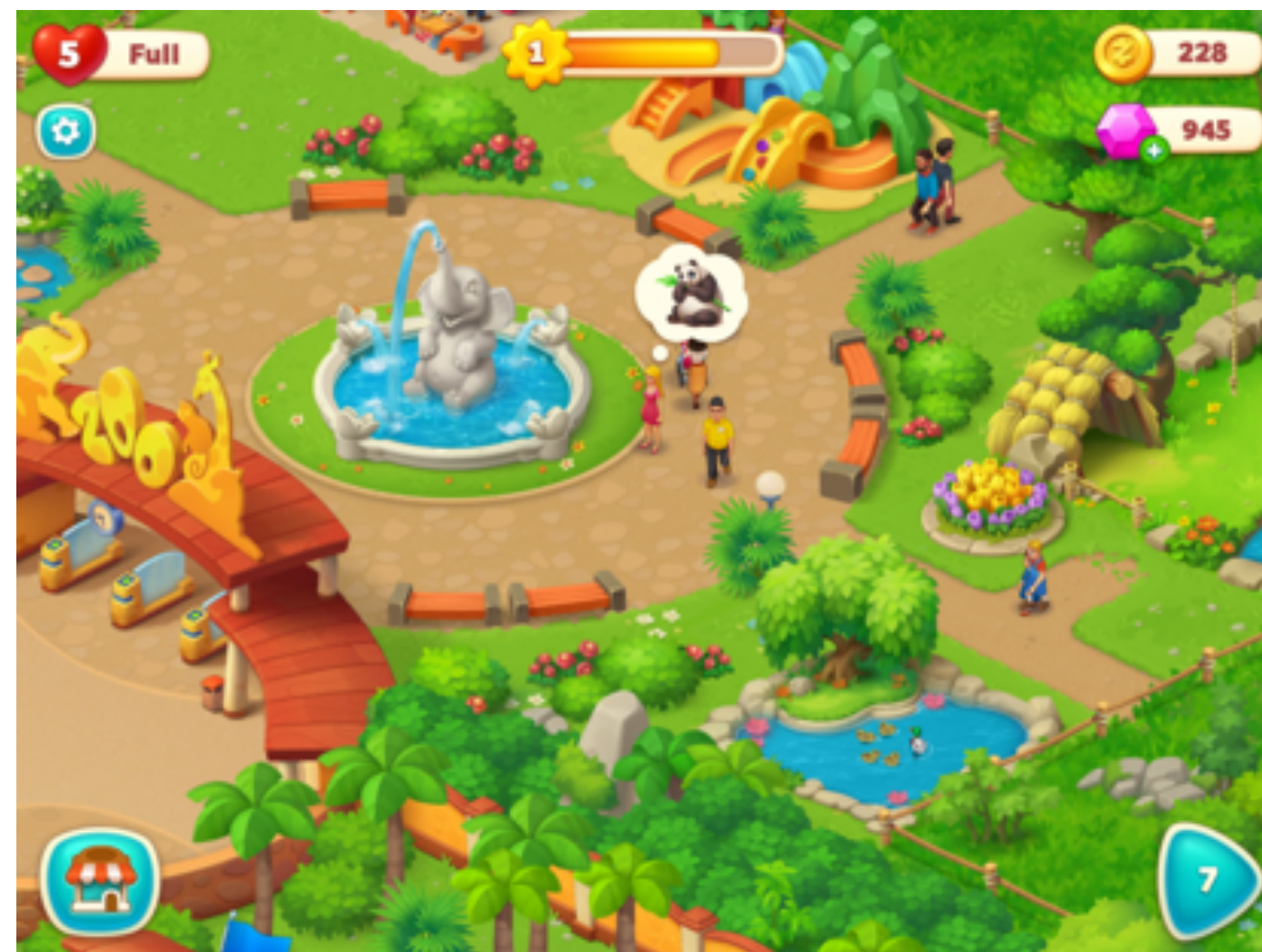
IN SOFT LAUNCH

WILDSCAPES (PLAYRIX)

WILDSCAPES (PLAYRIX)

Revenue Analysis

- This app soft launched 4/19/19 and currently live in 3 testing countries.

App Teardown

- Wildscapes is a match-builder that combines elements of Family Zoo the Story and Toon Blast. In the app, players progress animals for a reward. Tasks are more integrated into the game, appearing during progression, instead of on a *Task List*.

- There are two features with chest mechanics influenced by Toon Blast: Zoo Chest in Wildscapes (Toon Chest in Toon Blast) and Start Chest in Wildscapes (Star Chest in Toon Blast).

- The custom design choices are similar to Fishdom. In Wildscapes, players use a theme menu to choose between purchasable and standard custom designs (see Custom Design in the Library tool).

- For more images of the app, go to the Library tool: New User Flow, Tasks, and Zoo Animals. Download on iTunes (not available in the U.S.).
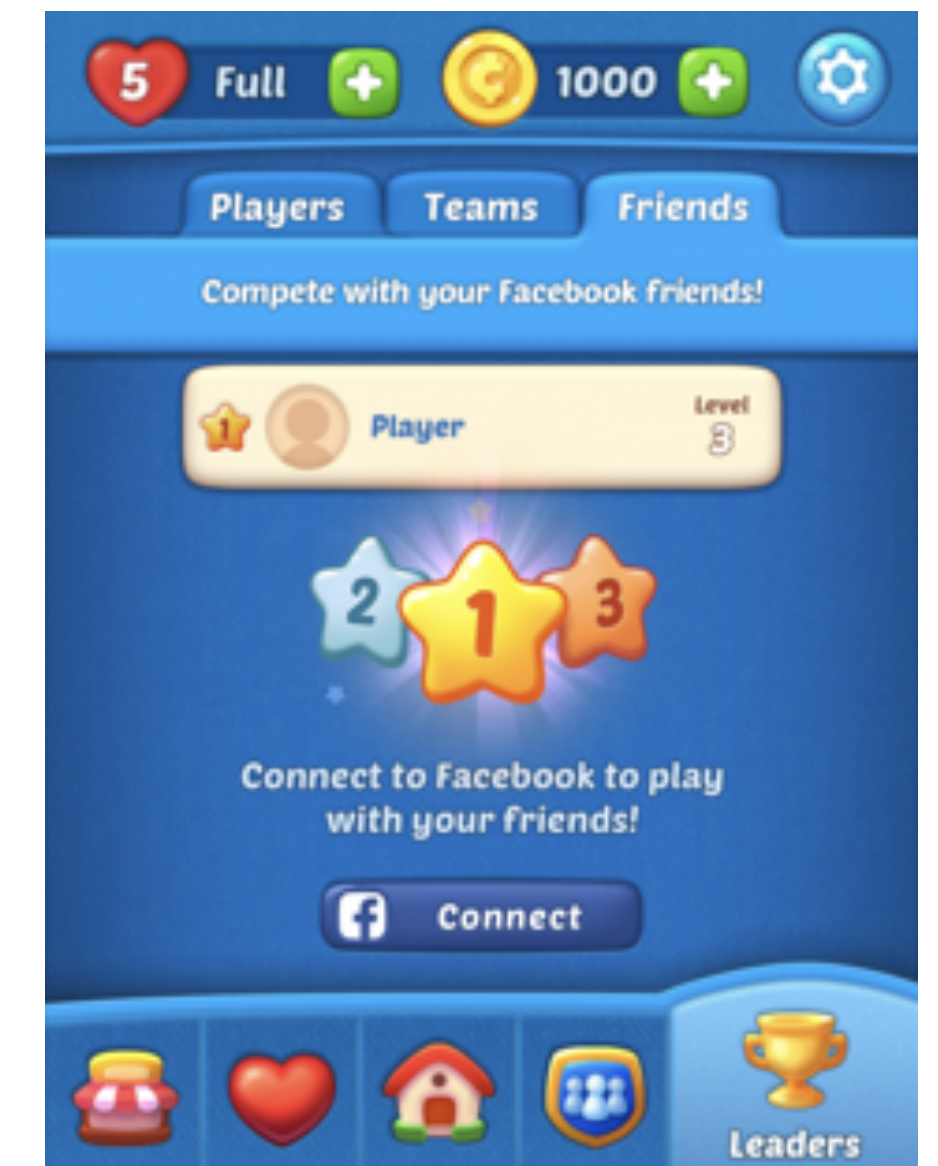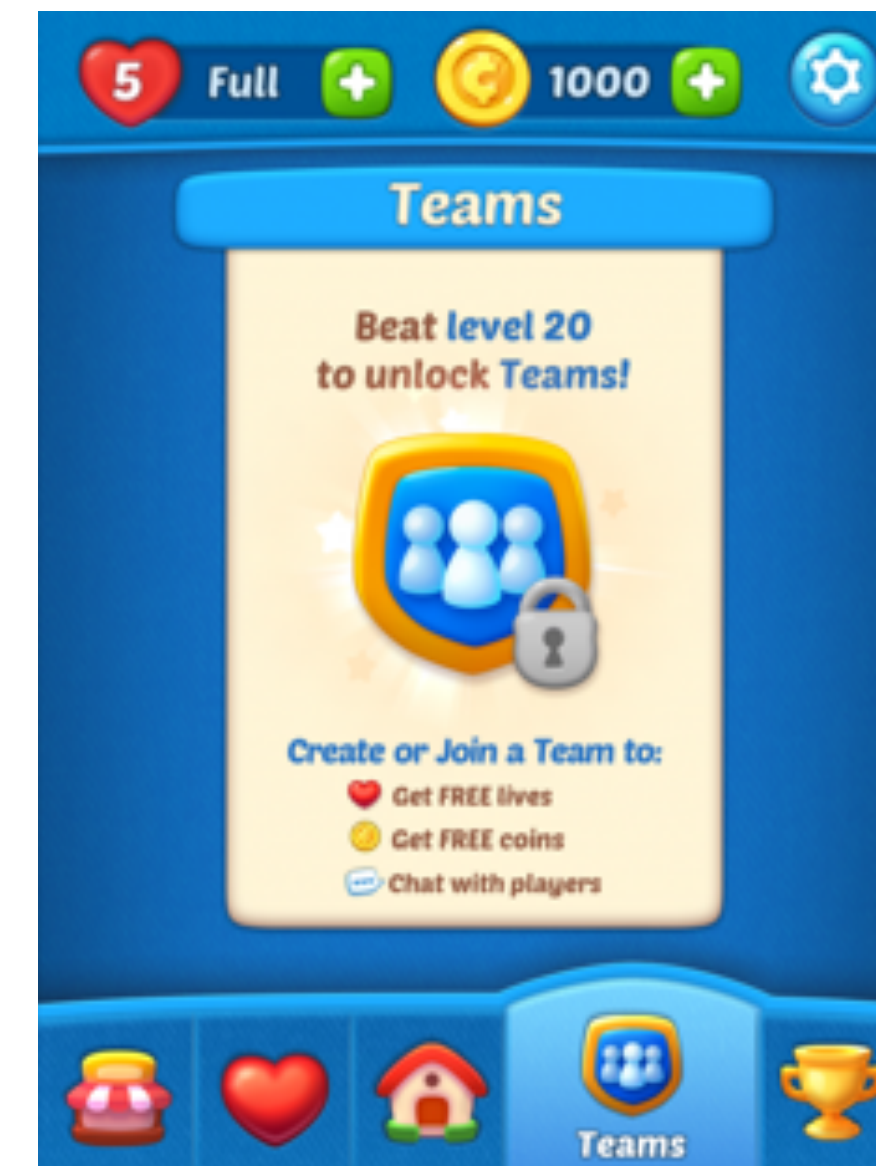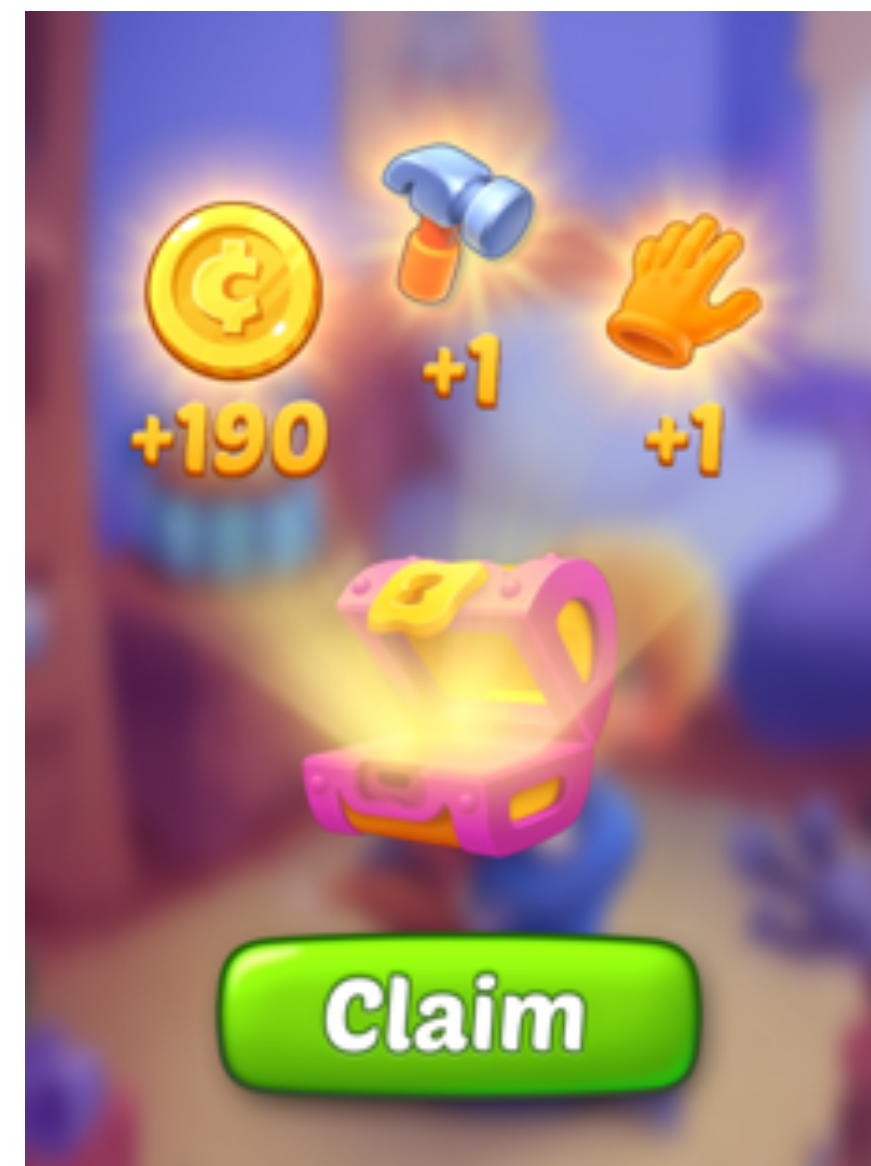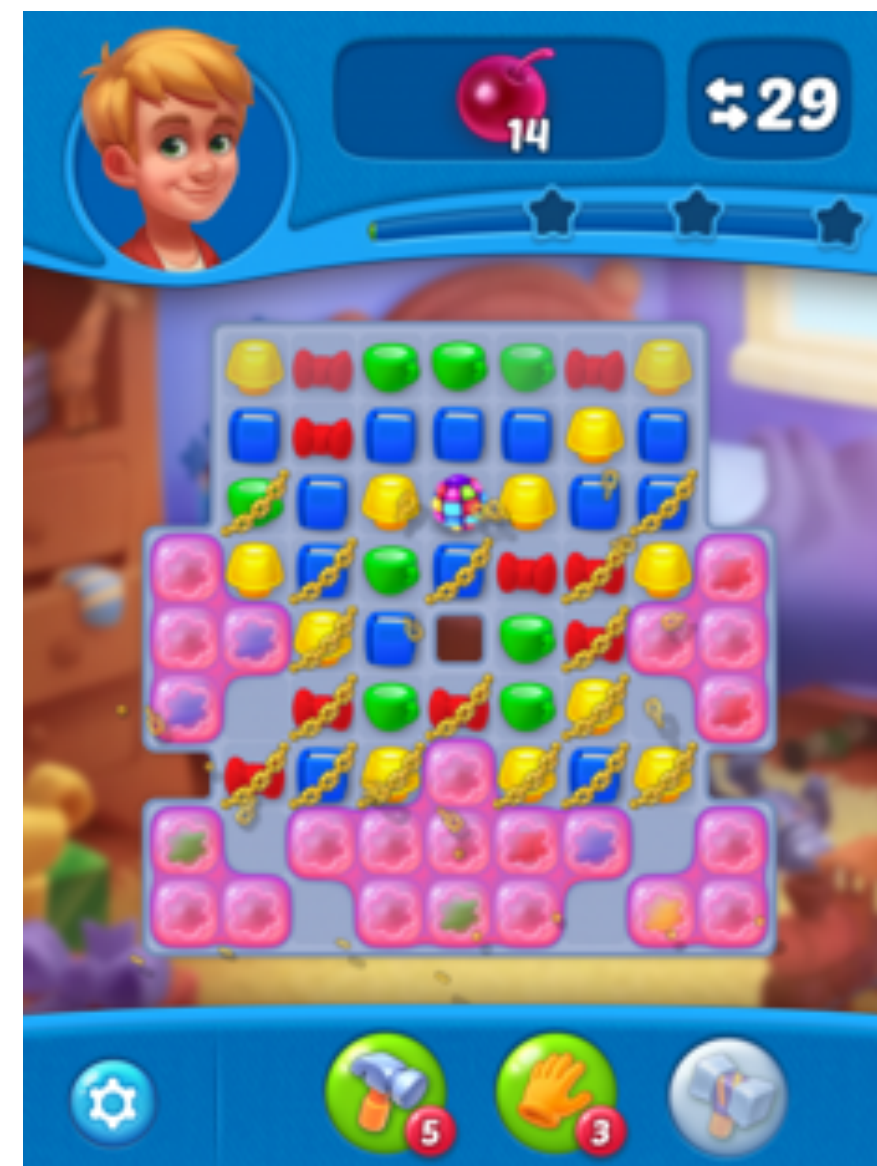
MEMORIES: MAGIC MATCH (PLAYRIX)

Revenue Analysis

• This app was soft launched 4/8/19 and currently live in 5 testing countries.

App Teardown

• This is a match-builder with level-based progression that combines components of Homescapes and Toon Blast. The level elements are very similar to Homescapes (New User Flow, Boosts, and Misc. Features).

• Both of the two features with chests mentioned in the Wildscapes teardown from Toon Blast are also in this app.

• The app will hard launch with Teams and a Leaderboard. There are also Boosts, Happy Chests, Star Chests, and Misc. Currency. Download on iTunes (not available in the U.S.).
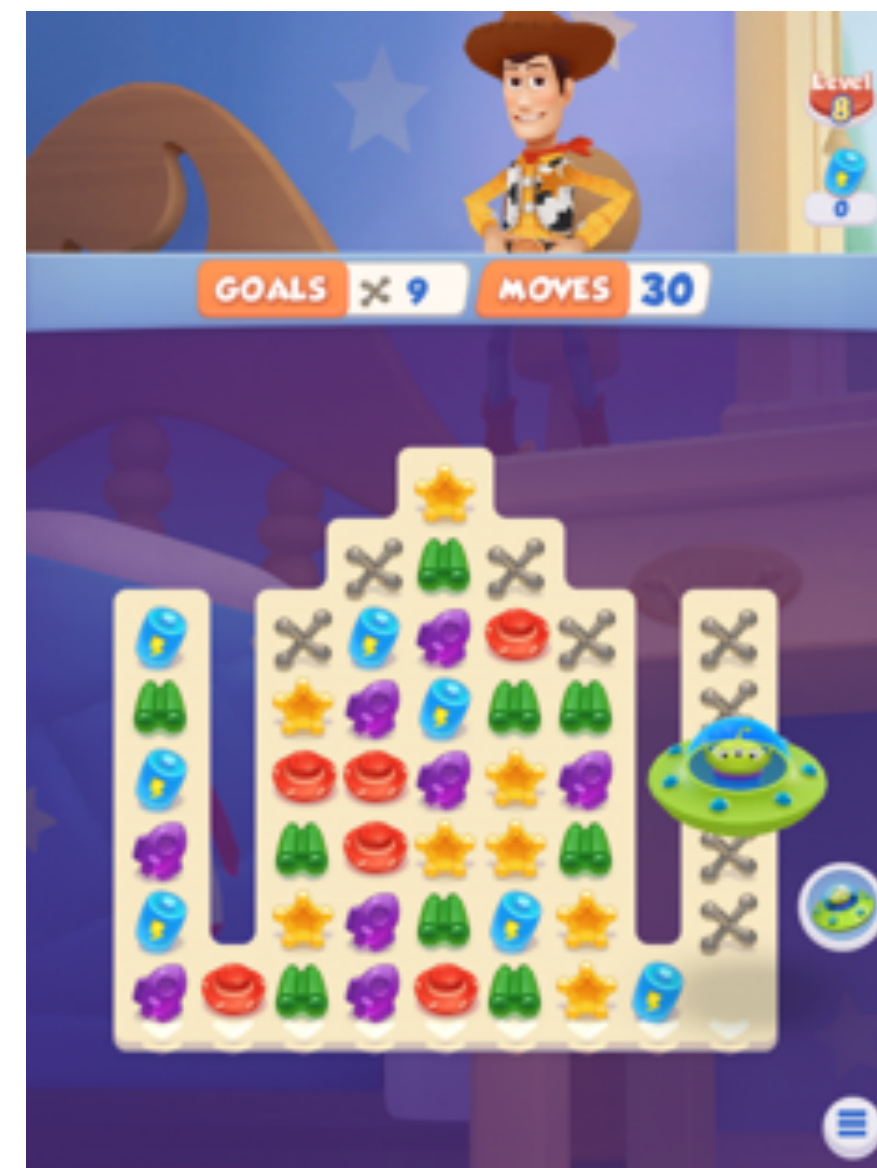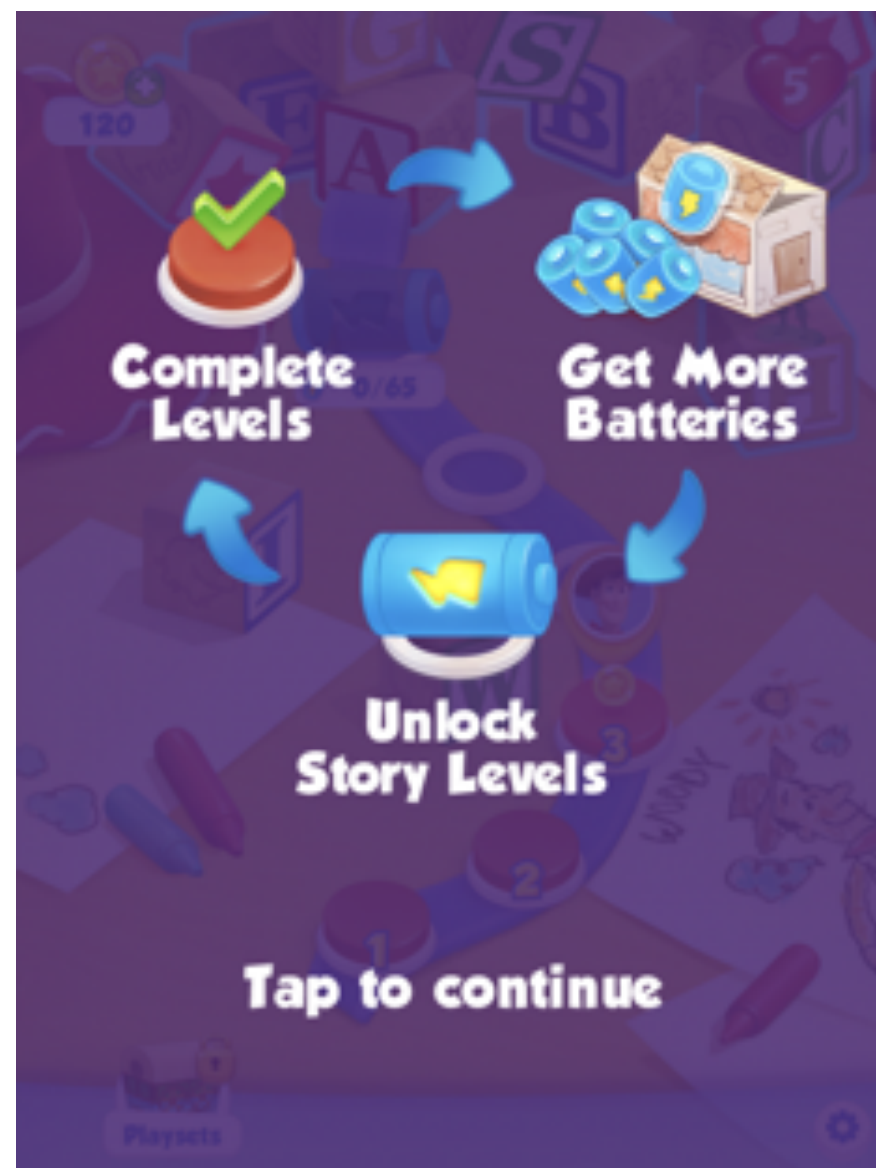
TOY STORY DROP (BIG FISH GAMES)

Revenue Analysis

• The app soft launched on 1/24/19 and is currently live in 9 testing countries.

App Teardown

• This match-builder app integrates IP into multiple storylines and mechanics. See this example video.

• In the app, players collect Batteries (soft currency) to unlock Story Levels. Players find Playset items in chests. Other features include the New User Flow, Boosts, Misc. Currency, and Misc. Features. Download on iTunes (not available in the U.S.).

MARKET WATCH

4/1/19 – 4/30/19

NOTABLE RELEASES

App	Description
Polysphere	Polysphere's revenue continues to climb. See Sensor Tower for details (1).
Candy Crush Friends Saga	King cross-promoted to Candy Crush Friends Saga with New Installs Gifts (2).
Angry Birds Match	Angry Birds Match released a Collection Feature titled, Outfit Crafting. In this feature, players use a new *Outfit Studio* to collect *Hatchling Outfits* with a new currency (3).
Gardenscapes	Gardenscapes released a Levels Event First Time's a Charm that awards players for completing 10 levels on the first attempt.
Angry Birds 2	Angry Birds 2's Restart Room gives players an option to start over in a room with a soft currency purchase.
Toy Blast	Toy Blast released Daily Challenges.
Cookie Jam & Cookie Jam Blast	Cookie Jam and Cookie Jam Blast released limited-time offers Blooming Prize Shop and County Fair, respectively. Both events award tickets for beating levels ... and more tickets for beating levels on the first try. Tickets are used to purchase various boosts in a special shop.
All Features Released	
Review all features and events released in the *new* Data Tool by filtering 'Year' and 'Month'	

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APPENDIX

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
Market Research	**Player Personas**	**Mobile App Store Intelligence**
Quadrant Strategies website	Kinrate Analytics website	Sensor Tower website

Quadrant Strategies

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.

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.

Kinrate Analytics

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.

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.

The products of Kinrate Analytics have been developed in university-led research projects in collaboration of economists, psychologists, game scholars, and data scientists.

Sensor Tower

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.

Clients harness Sensor Tower's suite of app intelligence tools to...

‣ 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

"You can design and create, and build the most wonderful place in the world. But it takes people to make the dream a reality."

– Walt Disney

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