Liquid & Grit

Puzzle Report

Competitive Research and Actionable Product Recommendations
# Table of Contents

**Impact Driver**
- Battle Pass Perks
- Farm Pass Season in Hay Day
- Product Insights

**Battle Pass Teardown**
- Mission Level Economy
- Mission Reward Economy

**Impact Analysis**
- Puzzle Event Investment
- Event Market Share Impact
- Battle Pass Features & Events

**Level Design**
- New Level Designs

**Market Watch**
- Soft-Launch & Breakout Apps
- Notable Releases

**Appendix**
- L&G Puzzle Personas
- Puzzle Product Council
- Premium Partnerships
- Puzzle Mechanics Taxonomy

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**January 2021**
IMPACT DRIVER

Features and events that boost revenue, retention, or downloads
Battle Pass Perks
Farm Pass Season in *Hay Day*
Hay Day saw revenue +56% and downloads +29% MoM after the launch of Farm Pass Season 1.

MoM = Month over month.
Graph data is iOS, U.S. only.
**Feature Teardown**

Players complete daily and season-long challenges to earn rewards at milestones. A premium pass adds more rewards and an exclusive cosmetic.

**Details**
- Month-long seasons offer daily and season-wide challenges (1).
- New season-wide challenges are added each week.
- Completed challenges award points that advance a chick down a path for rewards at milestones (video).
- A premium pass unlocks more rewards and milestones (2 and 3).
- Premium pass holders can earn an exclusive cosmetic each season (4).
- An initial trial season granted a free premium pass to all players.
- Some milestones unlock perks that remain for the entire season (5).
- Perks include additional building slots, gifts for friends, daily wheel spins, help requests, resource deliveries, and the ability to reactivate certain expired tasks (6).

**Additional Information**
- See the [Farm Pass Trial Season](#) and [Farm Pass Season 1](#) libraries for more images and videos.
Offer premium pass benefits that impact all major game systems.

In addition to exclusive cosmetics, Farm Pass’ premium pass also includes unlockable perks that enhance many other game features for the duration of the season (1). This entices achievement- and challenge-oriented players like the high-spender who told us he wouldn’t “spend coins on something like an avatar” but always buys passes because he wants “the full experience.”

Moreover, providing premium benefits for all aspects of the game ensures that pass holders receive constant affirmation of their elite status. This distinction from “normal” players is a major part of the appeal of premium passes. (2) Farm Pass could go even further by adding exclusive challenges for premium players.

Give non-pass holders a taste of each benefit.

Although you want premium players to feel special, make sure that free players don’t feel mistreated. Locking entire features can frustrate free players, likely hurting engagement and retention. (3) And if players don’t engage with a feature, it’ll be harder to entice them into buying a premium pass.

Farm Pass’ Trial Season granted all players the premium pass for free, cleverly letting them see what they’d be missing if they didn’t buy it for future seasons (2). We recommend giving free players a small reward of each type available to premium players during the full season. For instance, Farm Pass could offer a less desirable cosmetic in the free reward tier. Then, make sure that players know they can buy the premium pass at any time to retroactively claim earned rewards. (4)

Maximize motivation with short- and long-term goals.

Varying goal length is hardly a new concept in game design, but it’s often left out of battle passes. Studies show that small daily accomplishments can be highly motivating when they contribute to meaningful overall objectives. (5) Farm Pass’ mix of daily and season-wide challenges keep players going as they pursue more distant goals within the main progression.

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1 Age 35 male, $125/month spend, 60 hours/week playtime
2 Battle Pass Capitalism, p. 16
3 The Battle Pass: a Mixed-Methods Investigation into a Growing Type of Video Game Monetisation, p. 8-9
4 The Psychology of Fortnite’s Battle Pass
5 The Power of Small Wins
BATTLE PASS TEARDOWN

Reward and level economies for mission and battle pass releases
Mission Level Economy

*Homescapes, Fishdom, and Matchington Mansion* contain nearly identical numbers of mission levels, while *Candy Crush Soda Saga* has significantly fewer.

Click here to download the full mission economy spreadsheet and analysis.
Although *Candy Crush Soda Saga* has the fewest mission levels, it provides the greatest reward value by far—totaling over $400 for premium pass holders!

*Fishdom, Matchington Mansion, and Homescapes* each offer $76–$84 worth of rewards. All analyzed battle passes except *Fishdom*’s grant substantially more valuable premium rewards than free rewards.

![Mission Reward Value](chart.png)
IMPACT ANALYSIS

Investment and revenue trends for feature and event releases

Tracked puzzle apps: Angry Birds 2, Best Fiends, Bubble Witch 3 Saga, Candy Crush Jelly Saga, Candy Crush Saga, Candy Crush Soda Saga, Cookie Jam, Disney Emoji Blitz, Farm Heroes Saga, Fishdom, Gardenscapes, Gummy Drop!, Home Design Makeover, Homescapes, June’s Journey, Lily’s Garden, Lost Island: Blast Adventure, Matchington Mansion, Panda Pop!, Pet Rescue Saga, Solitaire Grand Harvest, Solitaire TriPeaks, Toon Blast, Toy Blast, and Wizard of Oz Magic Match
Missions were the most frequently released puzzle event type in 2020. 10% of all mission events released by tracked puzzle apps last year included battle passes.
Among event types, missions had the third largest impact on puzzle apps’ revenue market share, averaging +2.8% market share per release. Mission events with battle passes were even more impactful at +9.4% (not shown).

### Event Market Share Impact

#### Avg. Market Share Growth

- **Rewards**: -2.5%
- **Collections**: 0%
- **Missions**: 2.5%
- **Purchases**: 5%
- **Clubs**: 10%
- **Levels**: 12%
- **Competitions**: 10%
- **Mini-Games**: 6%
- **Accelerators**: 4%
- **Challenges**: 2%
- **Custom Design**: 0%
- **Quests**: -6%

#### Unadjusted Avg. Revenue Growth

- **Rewards**: -6%
- **Collections**: 0%
- **Missions**: 6%
- **Purchases**: 12%
- **Clubs**: 10%
- **Levels**: 8%
- **Competitions**: 6%
- **Mini-Games**: 4%
- **Accelerators**: 2%
- **Challenges**: 0%
- **Custom Design**: -2%
- **Quests**: -6%
Battle passes in Playrix's *Homescapes*, *Fishdom*, and *Gardenscapes* had the greatest impact on market share in 2020 for tracked apps.

<table>
<thead>
<tr>
<th>Feature/Event</th>
<th>App</th>
<th>Released</th>
<th>MoM Market Share Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cottontail Season</td>
<td>Homescapes</td>
<td>7/4/20</td>
<td>27%</td>
</tr>
<tr>
<td>Season Adventures 2</td>
<td>Fishdom</td>
<td>3/13/20</td>
<td>25%</td>
</tr>
<tr>
<td>The First Season of Wonders</td>
<td>Homescapes</td>
<td>4/25/20</td>
<td>16%</td>
</tr>
<tr>
<td>Feathery Season</td>
<td>Gardenscapes</td>
<td>5/18/20</td>
<td>14%</td>
</tr>
<tr>
<td>Lifeguard Season</td>
<td>Fishdom</td>
<td>7/23/20</td>
<td>10%</td>
</tr>
<tr>
<td>Disco Season</td>
<td>Gardenscapes</td>
<td>8/3/20</td>
<td>9%</td>
</tr>
<tr>
<td>Lovely Pony</td>
<td>Matchington Mansion</td>
<td>9/4/20</td>
<td>9%</td>
</tr>
<tr>
<td>Foxy Season</td>
<td>Gardenscapes</td>
<td>3/9/20</td>
<td>7%</td>
</tr>
<tr>
<td>Ghost Season</td>
<td>Fishdom</td>
<td>10/2/20</td>
<td>3%</td>
</tr>
<tr>
<td>Tech Season</td>
<td>Homescapes</td>
<td>8/21/20</td>
<td>2%</td>
</tr>
<tr>
<td>Mansion Badge</td>
<td>Matchington Mansion</td>
<td>4/29/20</td>
<td>2%</td>
</tr>
<tr>
<td>Spooky Season</td>
<td>Homescapes</td>
<td>10/10/20</td>
<td>1%</td>
</tr>
<tr>
<td>The Noble Path</td>
<td>Candy Crush Soda Saga</td>
<td>4/28/20</td>
<td>1%</td>
</tr>
<tr>
<td>Magic Season</td>
<td>Candy Crush Saga</td>
<td>10/20/20</td>
<td>1%</td>
</tr>
<tr>
<td>Blossom Badge</td>
<td>Matchington Mansion</td>
<td>7/23/20</td>
<td>-2%</td>
</tr>
</tbody>
</table>
Market share impact is the percentage change in an app’s revenue market share during a given time period following the release of a new feature, event, or piece of content.

For example, Homescapes had a 12% market share on 7/4/2020. A month later, its market share grew to 15.2%, a +27% increase.

We use revenue market share to reduce noise from overall market trends, such as the market-wide growth seen during the stay-at-home orders in Q1’20.
Level Design

New obstacles, boosts, and level requirements
**NEW LEVEL DESIGNS**

**Darksaber** – *Disney Emoji Blitz*
- Moff Gideon’s villain meter fills over time.
- When the meter is full, two vertical lines appear for a limited time.
- Emojis cannot move across the lines (1 and video).

**Compass** – *Fishdom*
- Cases contain compasses.
- Two adjacent matches or boosts open cases to reveal compasses.
- One more adjacent match or boost clears the compass.

**Winch** – *Fishdom*
- Each winch contains a chain that stretches across multiple spaces.
- Setting off boosts next to the winch reels in the chain by one space.
- Reeling in the chain all the way clears the winch.

**Moles** – *Gardenscapes*
- Moles appear on tiles that contain up to two layers of soil.
- Adjacent matches and boosts clear soil layers.
- Clearing soil beneath a mole moves the mole to an adjacent soil tile (2).
- Clearing all soil tiles clears the mole (video).

**Bear-in-a-Box** – *Homescapes*
- Adjacent matches or boosts open boxes in three stages (3).
- Boxes close one stage after any move that does not open them (video).
- Opening boxes all the way clears them.

**Belt Barrier** – *Matchington Mansion*
- Barriers with metal rings appear between pieces.
- Rings must first be cleared by boosts (4 and video).
- Then, adjacent matches or boosts clear the barrier.
MARKET WATCH

New apps and notable releases from established competitors
Royal Match by Dream Games

App Details
- Match-3 levels award stars that players use to build areas of a castle (1).
- Players can’t choose decorations.
- Local and global leaderboards rank individuals, clubs, and Facebook friends (2).
- Club features unlock at level 21 (3).
- Bonus levels have players collect as many coins as they can in a certain number of moves (4).

Launch Information
- Soft-launched on 7/21/20 in Canada, Great Britain, and Turkey
- Average daily revenue (90 days): $1,339
- Average daily downloads (90 days): 2,046
- View Royal Match on the App Store

Liquid & Grit's Take
Unlike other custom design-inspired match-3 apps, Royal Match doesn’t allow players to choose their decorations. New publisher Dream Games could be planning to add more options before the full launch, but as it is now, this lack of customization could limit long-term retention and monetization.

That said, the game’s castle areas have a unique aesthetic and 3D perspective that will help it stand out from the crowded match-3 field and give it a leg up in marketing and UA.
**MergeFriends** by Skunkworks

**App Details**

- Players merge items in a grid to complete tasks and renovate a general store (1 and [video](#)).
- New items can be generated from toolboxes by spending energy.
  - Items that grant energy can also be merged and upgraded (2).
- Players can speed up toolbox timers by watching ads or spending currency (3).
- Completing the general store unlocks a delivery feature in which players create items to fill orders (4 and [video](#)).
- An upgradable backpack lets players store items when the board is full.

**Launch Information**

- Soft-launched on 11/6/20 in Great Britain, Denmark, Finland, Ireland, Norway, and Sweden
- Average daily revenue since launch: $71
- Average daily downloads since launch: 127
- View MergeFriends on the [App Store](#)

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**Liquid & Grit’s Take**

With its stripped-down UI and limited features, MergeFriends lacks some of the razzle-dazzle seen in the leading merge-builder apps. The simple 2D grid that players use to manage and merge items is unlikely to be as compelling as the 3D play areas common to other apps.

Finnish studio Skunkworks appears to take an approach of launching fast, focusing on core gameplay, and testing a lot, so maybe there’s more to come. For now, MergeFriends doesn’t seem to have much to distinguish it from more polished competitors.
**Project Makeover** by Bubblegum Games

**App Details**
- Users play as the host of a makeover TV show to help a series of clients (1).
- Match-3 levels award currency for personal makeover and home renovation custom design tasks (2).
- Some levels award special items that players can choose to use or save for later (3).
- Levels also award soft currency that lets players customize their TV host avatar (4).
- Players can visit each other’s rooms and leave feedback on their avatars (5).
- Optional video stories show behind-the-scenes drama (6).

**Launch Information**
- Released worldwide on 11/15/20
- 3rd highest-grossing sims app and 5th highest-grossing puzzle app as of 12/1/20
- Average daily U.S. revenue since launch: $271,287
- Average daily U.S. downloads since launch: 133,908
- View Project Makeover on the [App Store](https://appstoreurl)
<table>
<thead>
<tr>
<th>App</th>
<th>Release</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Best Fiends**    | CiCi’s House                | • Players collect bracelets from wheel spins, crate rewards, and symbols with bracelet icons.  
|                    | collection event            | • Bracelets fill a meter that renovates sections of a house at milestones (1 and video).  
|                    |                              | • Completing the house grants early access to a new character. |
| **Cooking Madness-Kitchen Frenzy** | Christmas Square quest event | • Players complete levels to earn bells and advance on a quest map.  
|                    |                              | • Levels occur in series of five.  
|                    |                              | • Players who fail a level must restart the series unless they spend diamonds to try again.  
|                    |                              | • Bells are used to renovate sections of a Christmas-themed area (video).  
|                    |                              | • Renovated sections fill a meter for rewards at milestones (2). |
| **Hay Day**        | Advent Calendar              | • Players collect daily gifts from a neighboring farm (3).  
|                    | reward event                 | • Unclaimed gifts from previous days can be collected any time during the event (video).  
|                    |                              | • Gifts include boosts, diamonds, exclusive decorations, and more. |
| **Love Nikki-Dress UP Queen** | Library Night challenge event | • Players choose pieces of an outfit to match an indicated theme (4).  
|                    |                              | • Outfits are scored based on how well they fit the theme (video).  
|                    |                              | • Players earn quills based on their scores.  
|                    |                              | • Quills award prizes at milestones, including parts of an exclusive outfit.  
|                    |                              | • Players can spend diamonds to play again. |
# NOTABLE RELEASES II

<table>
<thead>
<tr>
<th>App</th>
<th>Release</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Matchington Mansion**  | **Token Shop**   | • Two tiers of extra difficult levels award tokens.  
                           | collection feature | • Tokens can be used to buy custom design items from a store (1 and video). |
| **Panda Pop**            | **Panda World**  | • First-try wins award a feature-specific currency.  
                           | challenge feature  | • Currency is used to renovate sections of a room for rewards (2).  
                           |                  | • Completing all rooms in an area awards a prize and unlocks the next area (video). |
| **Township SiM**         | **Surprise for Santa** | • A snowboarding mini-game has players avoid obstacles to collect bonuses and tickets (3).  
                           | custom design event | • Tickets are used to decorate sections of Santa's workshop (video).  
                           |                   | • Completed sections fill a meter for rewards at milestones.  
                           |                   | • Reaching a certain milestone permanently unlocks the workshop. |
| **Toy Blast**            | **Hoop Shot**    | • Players choose from a board of 16 challenges represented by four colors of basketballs (4).  
                           | challenge feature  | • Switching challenges resets progress for the previous challenge.  
                           |                  | • Completing a challenge removes all other challenges of that color (video).  
                           |                  | • Completing one challenge of each color awards a prize.  
                           |                  | • Players can complete one set of four challenges each day. |
| **Wizard of Oz Magic Match** | **Winter Season** | • Daily and season-wide challenges fill a point meter (video).  
                             | mission feature     | • Completing the meter advances players to the next reward tier.  
                             |                    | • A premium pass unlocks a second set of rewards for each tier, including customizable pieces.  
                             |                    | • After completing all reward tiers, extra points are stored in a safe for additional rewards at the end of the season. |

Quickly review all features and events
Filter the Library Tool by month and year to see all new releases.
APPENDIX
Survey data from 1,513 puzzle players produced five personas with distinct motivations: Gamer Gary, Escapist Emily, Trainer Tracy, Challenger Chris, and Casual Carol.

<table>
<thead>
<tr>
<th>Demographics</th>
<th>Gamer Gary</th>
<th>Escapist Emily</th>
<th>Trainer Tracy</th>
<th>Challenger Chris</th>
<th>Casual Carol</th>
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<tr>
<td>Size (N)</td>
<td>24%</td>
<td>15%</td>
<td>22%</td>
<td>18%</td>
<td>21%</td>
</tr>
<tr>
<td>Female (%)</td>
<td>53%</td>
<td>68%</td>
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<th>Monetization</th>
<th>Propensity to spend across all platforms</th>
<th>Gamer Gary</th>
<th>Escapist Emily</th>
<th>Trainer Tracy</th>
<th>Challenger Chris</th>
<th>Casual Carol</th>
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<tr>
<td></td>
<td></td>
<td>15.0</td>
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<th>Weekly play hours</th>
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<td></td>
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<tr>
<th>Engagement</th>
<th>Puzzle motivation</th>
<th>Gamer Gary</th>
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<th>Trainer Tracy</th>
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<tr>
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<td>3.1</td>
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<td>2.6</td>
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<th>Motivational Buckets</th>
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<th>Escape</th>
<th>Utility</th>
<th>Challenge</th>
<th>Boredom</th>
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<tbody>
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<td>-0.1</td>
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<tr>
<td>Utility</td>
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<td>-0.3</td>
<td>0.7</td>
<td>0.0</td>
<td>-0.3</td>
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<tr>
<td>Challenge</td>
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<td>-0.1</td>
<td>0.1</td>
<td>0.7</td>
<td>-0.3</td>
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<tr>
<td>Boredom</td>
<td>-0.3</td>
<td>0.0</td>
<td>-0.2</td>
<td>-0.3</td>
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</table>
# Puzzle Product Council

To boost our insights, Liquid & Grit gathers recommendations and intelligence from industry-leading product experts.

<table>
<thead>
<tr>
<th>Helen Grabarchuk</th>
<th>Florian Steinhoff</th>
<th>Florian Ziegler</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Co-Founder and COO of PuzzleMove Inc.</strong> <a href="#">LinkedIn Profile</a></td>
<td><strong>Mobile F2P Consultant</strong> <a href="#">LinkedIn Profile</a></td>
<td><strong>Consultant in Mobile Gaming</strong> <a href="#">LinkedIn Profile</a></td>
</tr>
<tr>
<td>Helen is a level design expert. At PuzzleMove Inc., Helen develops new puzzle products for different platforms, focusing on mobile devices. Helen spent over two years at Zynga as a puzzle content creator. After Zynga, Helen created concepts, puzzles, testing, and puzzle content for dozens of iOS and Kindle apps.</td>
<td>Florian has built and led teams that created top-grossing mobile casual games. For the last 10 years, he has overseen game projects during all phases—research, concept, prototyping, pitching, pre-production, production, and live-ops. His most successful title is <em>Jelly Splash</em>, which reached a monthly player base of +30M. To find out more, check out his GDC talk on casual puzzle games, difficulty curves, and the importance of randomness <a href="#">here</a>.</td>
<td>After over a decade of making games, Florian now advises game studios and companies on improving their game products through his own consultancy, Lava Lake Games Consulting. Before launching his own consultancy, Florian worked at Electronic Arts on flagship titles, such as <em>Need for Speed: No Limits</em>. He also spent time at King as a principal designer. At Mind Candy, he was the lead game designer on titles that include the mobile hit <em>World of Warriors</em>. This gained Apple’s Editor’s Choice Award and scaled the charts to the No. 1 game position in most major markets.</td>
</tr>
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**PREMIUM PARTNERSHIPS**

Liquid & 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.

<table>
<thead>
<tr>
<th>Quadrant Strategies</th>
<th>Kinrate Analytics</th>
<th>Sensor Tower</th>
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<tbody>
<tr>
<td><strong>Market Research</strong></td>
<td><strong>Player Personas</strong></td>
<td><strong>Mobile App Store Intelligence</strong></td>
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<tr>
<td>Quadrant Strategies</td>
<td>Kinrate Analytics</td>
<td>Sensor Tower</td>
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</tbody>
</table>
| 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 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 with economists, psychologists, game scholars, and data scientists. | 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. |
## Puzzle Mechanics Taxonomy

<table>
<thead>
<tr>
<th>Family</th>
<th>Definition</th>
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</thead>
<tbody>
<tr>
<td>Accelerators</td>
<td>Increases in the power, impact, or efficiency of play</td>
</tr>
<tr>
<td>Banks</td>
<td>Features that save a % of spend to be unlocked later</td>
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<tr>
<td>Bonuses</td>
<td>Free bonuses given to players (e.g., retention or W2E)</td>
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<tr>
<td>Challenges</td>
<td>Goal-oriented tasks for players to complete</td>
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<tr>
<td>Clubs</td>
<td>Groups that accomplish goals or compete with other groups</td>
</tr>
<tr>
<td>Collections</td>
<td>Sets of items that players collect (often for a completion prize)</td>
</tr>
<tr>
<td>Competitions</td>
<td>Features where players compete against other players</td>
</tr>
<tr>
<td>Cosmetics</td>
<td>Improvements or updates to the app or features</td>
</tr>
<tr>
<td>Currencies</td>
<td>Changes to currencies, economies, stores, and items</td>
</tr>
<tr>
<td>Custom Design</td>
<td>Options for cosmetic customization</td>
</tr>
<tr>
<td>Expansions</td>
<td>Additional rooms, worlds, play modes, VIP lounges, etc.</td>
</tr>
<tr>
<td>Flows</td>
<td>Specific flows, like the NUX, ratings, and surveys</td>
</tr>
</tbody>
</table>

### Hazards
- Level elements/blockers that increase difficulty

### Interactions
- Social features with direct or indirect interaction

### Leaderboards
- Stand-alone leaderboards

### Levels
- Anything to do with leveling

### Mini-Games
- Smaller, shorter games within games (e.g., scratch cards)

### Missions
- Linear sets of tasks that players must accomplish

### Notices
- Feature or product announcements

### Other
- Miscellaneous features and outliers

### Profiles
- Features related to a player’s settings, profile, and controls

### Purchases
- Anything to do with purchases

### Quests
- Tasks that advance players along a map-like feature

### Rewards
- Rewards players receive for engagement or spend
“Work hard! In the end, passion and hard work beats out natural talent.”

– Pete Docter