

GameRefinery

By Vungle

Match3 Genre Snapshot

May 2021



GameRefinery uses a three-layered approach to categorize games

- Using a **Category -> Genre -> Subgenre** hierarchy we are able to differentiate games in a meaningful way and offer accurate insights for all individual game types currently found in the market
- Our taxonomy is **created together with industry experts** and is based on thorough testing and data-analysis of the market
- In this report we are focusing on the **Match3 subgenre**, which belongs to the “Puzzle” genre under Casual



GameRefinery's Genre Taxonomy

Short Q1 2021 Market Overview



Erno Kiiski

Chief Game Analyst - US

Match3 has always been one of the most successful genres in mobile gaming - and still is. For instance, Match3 games currently bring in about 16% of all US iOS revenue (bubble shooters excluded), making it the biggest subgenre in the whole region.

Evergreen hits like Candy Crush Saga, Toy Blast & Candy Crush Soda Saga continue to be major contributors to Match3 games' success. These mature titles represent a more "traditional" approach as they focus solely on core gameplay, i.e. crunching candies and tiles, but they have innovated heavily on the live events they offer for players. However, the second wave of Match3s led by titles like Gardenscapes and Homescapes brought "decorating / narrative" meta layers to the subgenre.

Looking at the past 12 months, the biggest hit game to enter the market, Project Makeover, took the "decoration/narrative" formula even further with its "Project Runway" style visual appearance makeovers combined with a heavy narrative focus and the more common room decoration meta aspects. But then again, Royal Match, another mega hit of the past 12 months, just has a light decoration meta, akin to "Coin Master" and no narrative. The main focus is on the super smooth core gameplay + social aspects in the vein of Toon Blast.



Key points



Erno Kiiski
Chief Game Analyst - US



- Currently Match3 is the biggest subgenre in the US iOS market, contributing about 16% of the market's revenues.
- Only a handful of new games are entering the Match3 market which is primarily dominated by games that have been on the charts for years.
- Project Makeover managed to break into the top 5 of Match3 games in the US. A feat that not a single game has been able to do for several years.
- Blast-mechanics used to trend heavily in new top grossing Match3 games, but this trend seems to have died. All games entering the top 500 grossing over the past 1.5 years have used traditional Swapping mechanics.
- A constant stream of content is crucial to keeping your players happy and engaged. That's why constantly running live events is an essential part of modern Match3 games.
- Live Ops and innovation in events is more important than ever to keep things fresh, and players engaged and coming back to the game.
- Loss Aversion- mechanics are used more and more in various ways in the Match3 market.






Market

- Top games and their market share



Top games and their current market share within the **Match3** subgenre in US iOS

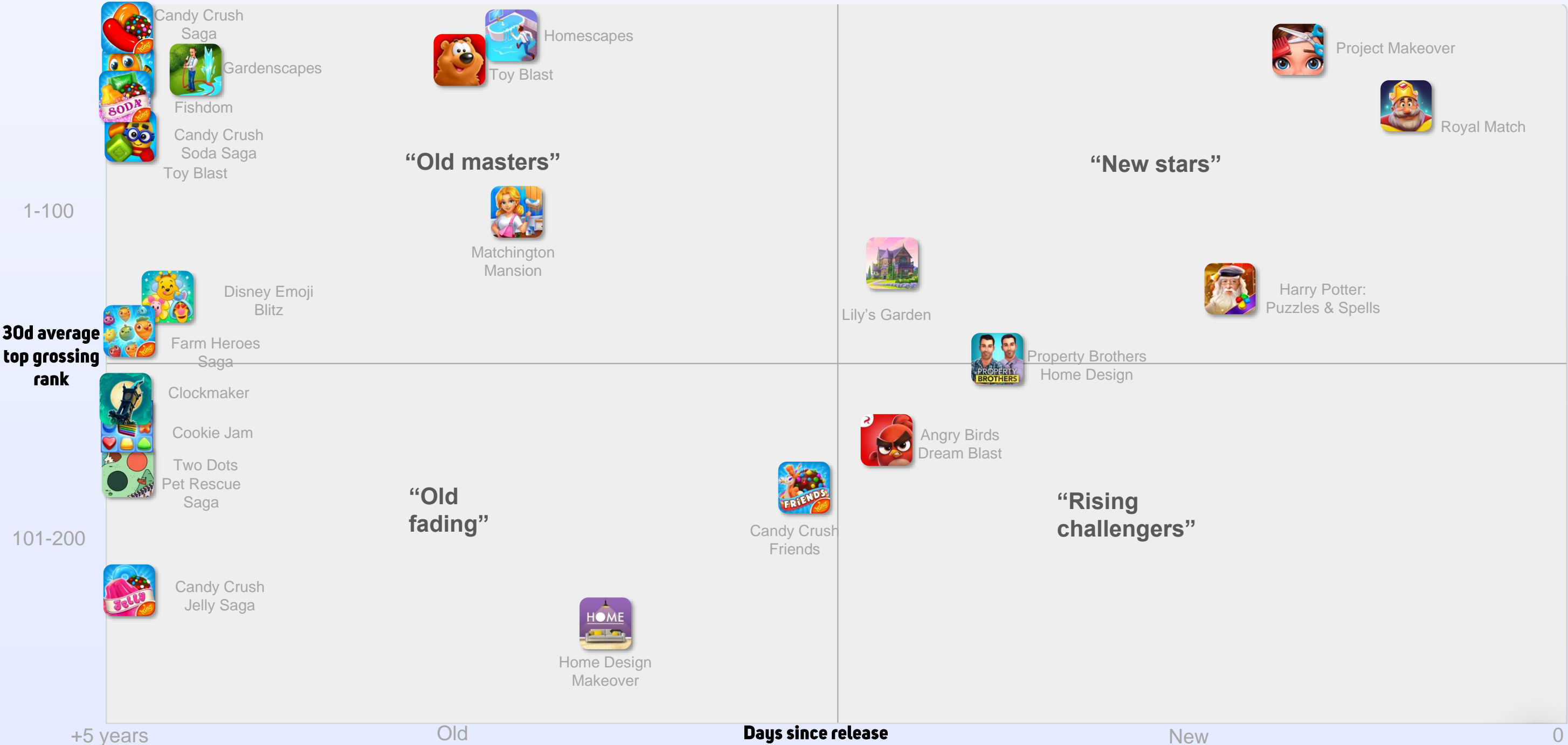
Key takeaway: We have not seen any shakeups in the top 5 US Match3 games for a couple of YEARS. But now Project Makeover entered the market and instantly became one of the biggest Match3s around. Also noteworthy is that Homescapes managed to grow when comparing Q1s of 2020/2021 while other top competitors saw a slight decline.

Match3 Puzzle		2021 Q1			
		Rev	Change*	DL	Change*
	1. Candy Crush Saga King Match3 Puzzle	16.74%	-1.28	11.27%	+0.76
	2. Homescapes Playrix Match3 Puzzle	11.24%	+0.64	12.82%	-4.36
	3. Project Makeover Magic Tavern, Inc. Match3 Puzzle	10.57%	+10.57	45.51%	+45.51
	4. Gardenscapes Playrix Match3 Puzzle	7.91%	-3.2	6.5%	-7.21
	5. Toon Blast Peak Games Match3 Puzzle	7.18%	-3.89	2.93%	-2.57

* Change YoY

Top games and challengers in the Match3 subgenre (US iOS)

Key takeaway: This past 12 months has seen 3 very successful Match3 launches (Project Makeover, Royal Match, Harry Potter: Puzzles & Spells). And what is even more interesting that all these games are quite different from each other in terms of their gameplay/feature-set.



The megahits of the **Match3** subgenre in the past 12 months – what are they all about?



Royal Match

Analyst's Overview

Our analyst's key takeouts

Genre & Style

Royal Match is a polished Match3 game with classic swapping mechanics. It has a cartoonish "royalty" theme.

Features & Progression

- Completing **puzzle levels with various goals** gets you stars
- These stars are used to complete **tasks (renovating different rooms)**
- When all the tasks from a single **room has been completed**, players can move to the next one
- Renovating rooms is quite simple in this game and there are no player choices on how to renovate different rooms (e.g. choose from 3 options)
- Once in a while, there are "**bonus levels**" which you can't fail. In these you can just collect coins as much as you're able with set number of moves
- **Guilds** form the social platform where player can chat, send lives to others, compete in Team Battles
- Competitive recurring **King's Cup- event**
- Various other types of recurring events (e.g **Book of Treasures, Propeller Madness**)
- **Royal League**-feature for players who have completed all the levels

Monetization

- Consumable **boosters** to help in levels
- **Monetized continue** after failing a level (extra incentive for this with constant win streak event **Butler's Gift**)
- Buying more **lives** (you lose one life per failed level)

Special Notes

The core gameplay is very fast-paced. All the match animations etc. are very quick + you can even make matches during the animations (so you don't have to wait for all the pieces to drop to their place) which gives the core gameplay experience very smooth/responsive feel.

Like most Match3 games, there are separately marked "**hard levels**". Interesting aspect in this game is that those levels give extra currency + extra progression for the recurring events as well.

The megahits of the **Match3** subgenre in the past 12 months – what are they all about?



Project Makeover

Analyst's Overview

Our analyst's key takeouts

Genre & Style

Project Makeover is a casual cartoonish match3 game where you embody the role of a Makeover TV-show director. It innovates on the match3 subgenre by expanding the meta from **home design** to **visual look makeovers** as well.

Features & Progression

- **Core gameplay** is very traditional match3 with swapping mechanics
- Player earns **coins** which are used to complete **tasks** in order to progress further in the makeover
- When a makeover is completed, players can move on to a next **episode**
- **Narrative** ties makeover episodes together with "behind the scenes drama" etc.
- Players can also choose how their own **avatar** looks, what kind of clothes they have and even decorate the "**director's room**" as they want
 - Different options are bought with **cash**
 - More options for clothes/decorative furniture is unlocked by playing the game

Monetization

- **Premium currency** to purchase:
 - **Consumable boosters**
 - **Lives**
 - **Continue/retry after failing**

Special Notes

- Some levels offer "**Mystery boxes**" if the player is able to finish them with the first try. These boxes have unique accessories that can be used in some of the makeover episodes. This mechanic brings more incentive to use boosters/continues in order to get the level done straight away.
- Players can participate in "**exclusive levels**" when they've completed all the levels so far until the next update

Swapping is back?



- **Blast-mechanics**
- **Swapping-mechanics**



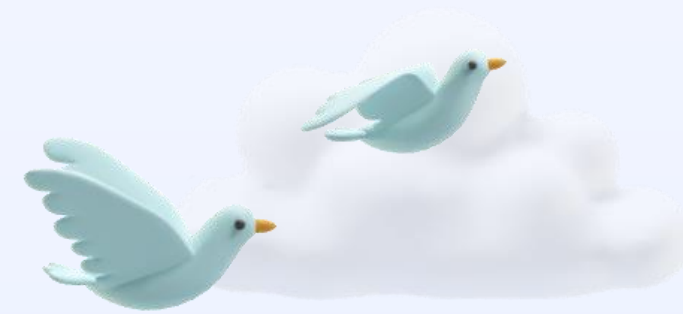
Erno Kiiski

Chief Game Analyst - US

For a while Blast-mechanics dominated new successful Match3s. Like in this [blog post](#) that we published back in early 2020, almost every new game hitting higher in the grossing charts were Blasting/Collapse-types of games. Meaning games where players tap similar colored cubes that are next to each other to make a match (Toon Blast, Lily's Garden etc.)

But now if we look at this graph of Match3 games released during the past 730 days that are in the top 500 grossing, the trend has totally died and only traditional swapping Match3s have been able to find their way into the charts

Source: GameRefinery SaaS Dashboard



Features & Updates

- Top features
- Implementation examples

Top features with the biggest revenue impact within the Match3 subgenre

Feature	Revenue impact
Live events - Recurring	●●●●●●
Special rewards from live events	●●●●●●
Live events - Non-recurring	●●●●●●
Limited time IAP-offers	●●●●●●
Special live event currency/material/resource	●●●●●●
Special levels/non-PvP modes outside main progression	●●●●●●
Send/ask help	●●●●●●
Guild mechanics	●●●●●●

Source: GameRefinery SaaS Dashboard

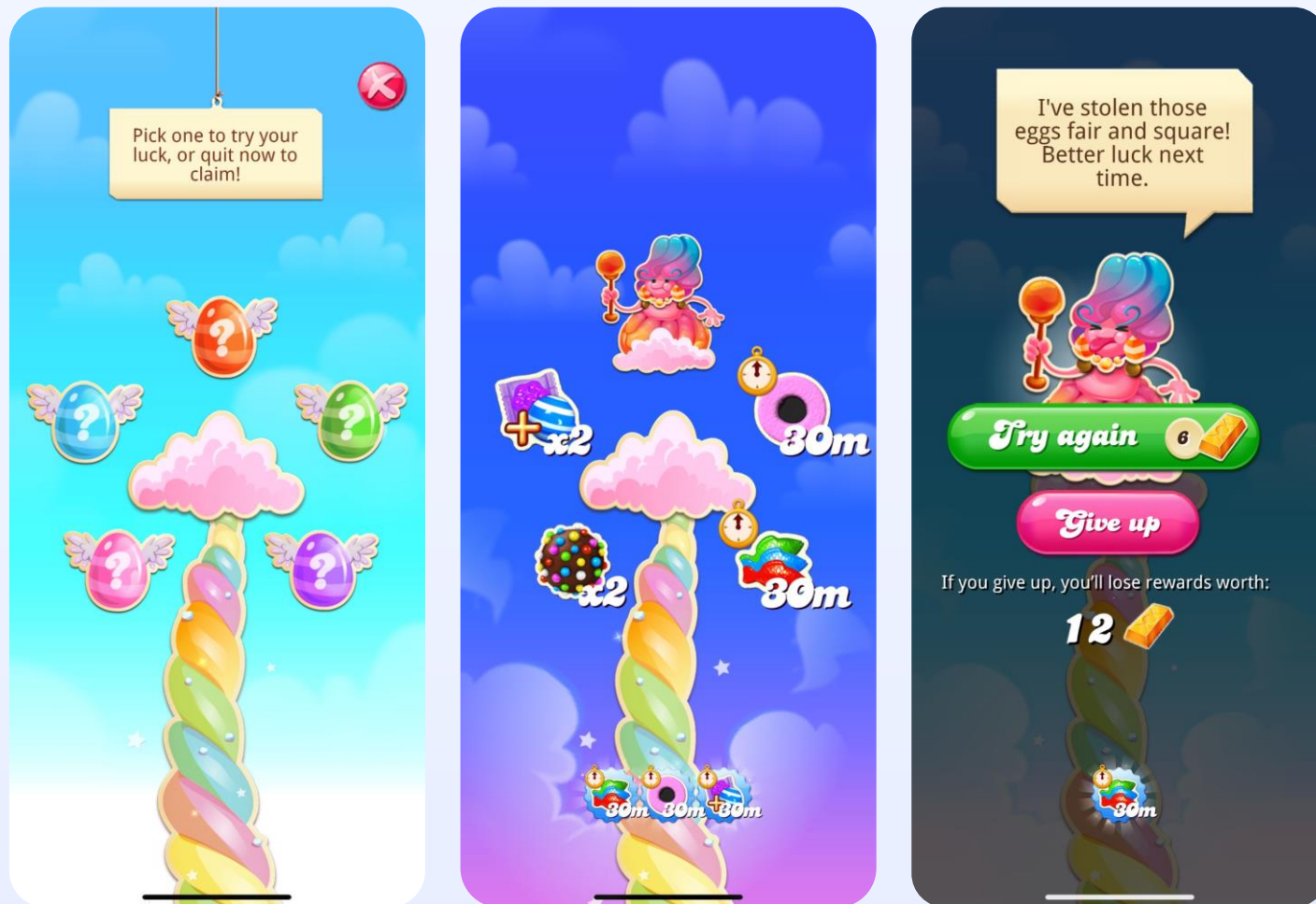


Erno Kiiski
Chief Game Analyst - US

In the early days of mobile gaming, Match3s had quite simple and straightforward mechanics. You completed level after level, puzzle after puzzle. But nowadays things are quite different. A constant stream of content with fast enough cadence is super important in keeping your players happy and engaged. That’s why **constantly running live events is an essential part of modern Match3s**. Market data quite clearly indicates that these event related features have a significant impact on a games revenue potential - if done right.

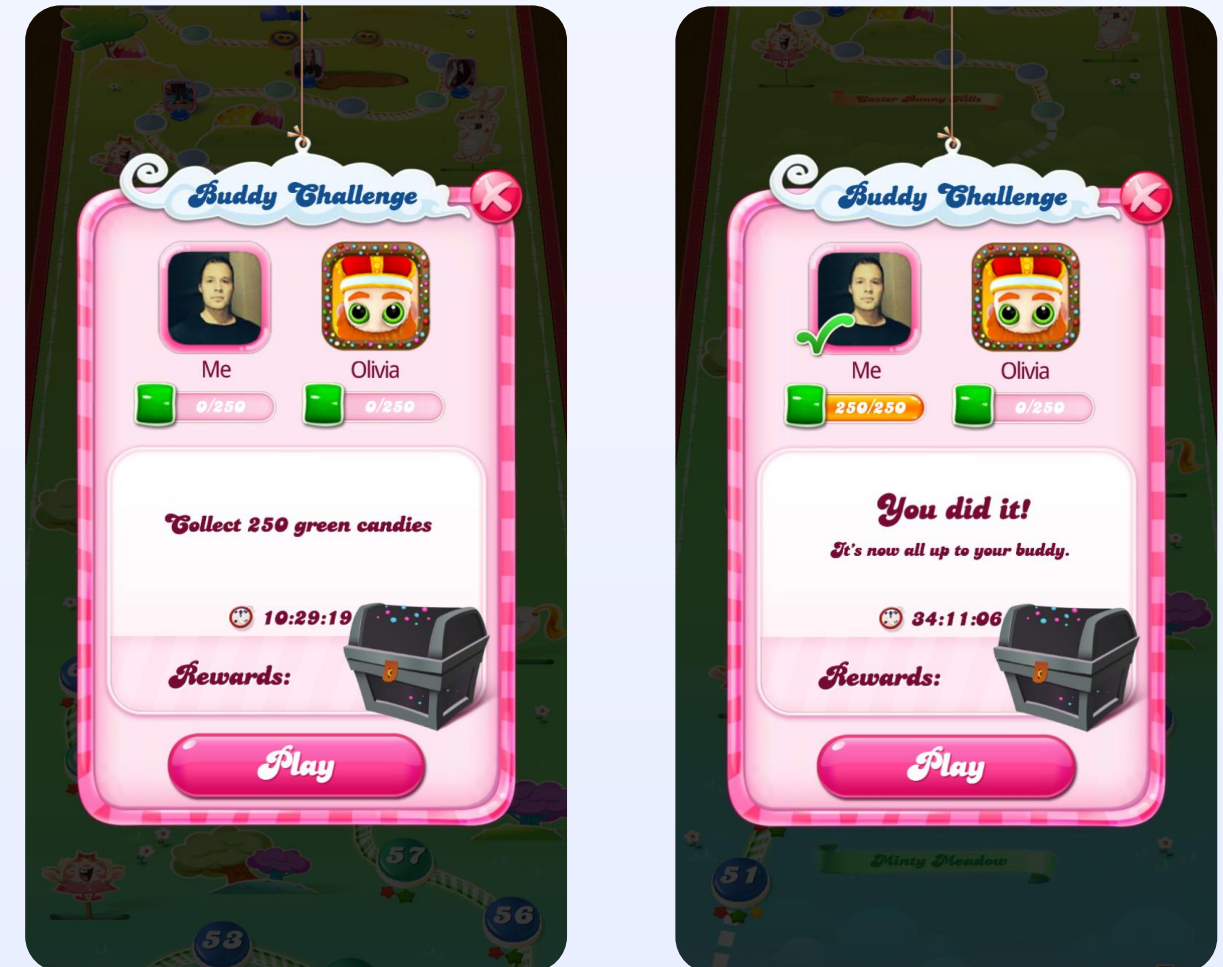
Other key differentiators between the top games and the rest in terms of individual features are **social features**, such as guild mechanics and other features that incentivize players to interact with other players socially. As the market has been maturing, the possibilities for social interaction have found their places in top Match3s

Implementation examples from top Match3 games: Events



Candy Crush Saga – “Cloud Climb event”

Candy Crush Saga – THE Match3 game. It may lack in the meta layer innovations of its successors in the market, but it surely keeps on pushing interesting events for its player base. In this tower event players must choose between various eggs to get boosters, but one of the choices always ends your climb and you lose all your accumulated rewards. After every turn, you can choose to stop the climb and claim the rewards or continue forward. This type of risk/reward balance act- features/events have been seen in other genres/games (such as Angry Birds 2).



Candy Crush Saga – “Buddy challenge”

Candy Crush Saga has also been pushing various social aspects through their events. The Buddy Challenge-event puts two players together and incentivizes them to complete certain tasks together cumulatively. This is just one of several social event types in Candy Crush Saga.

Implementation examples from top Match3 games: Win Streak-utilization



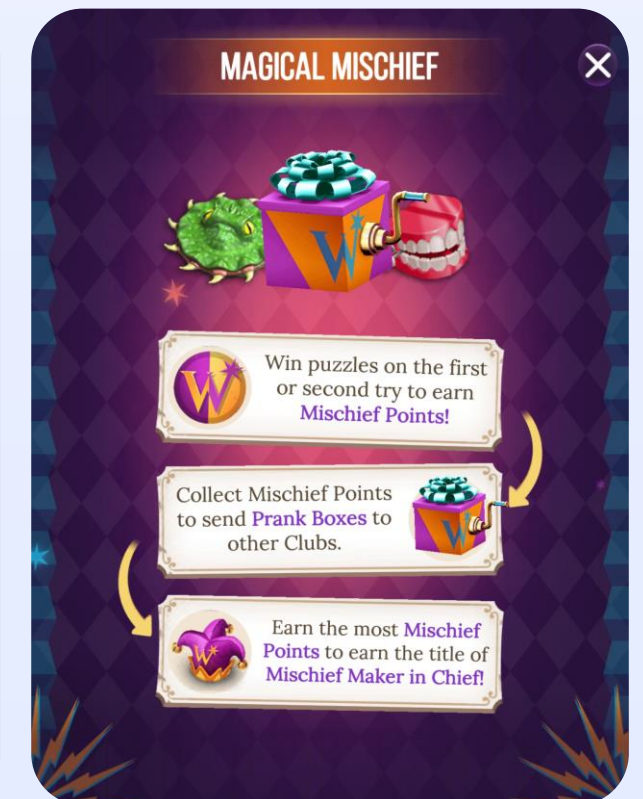
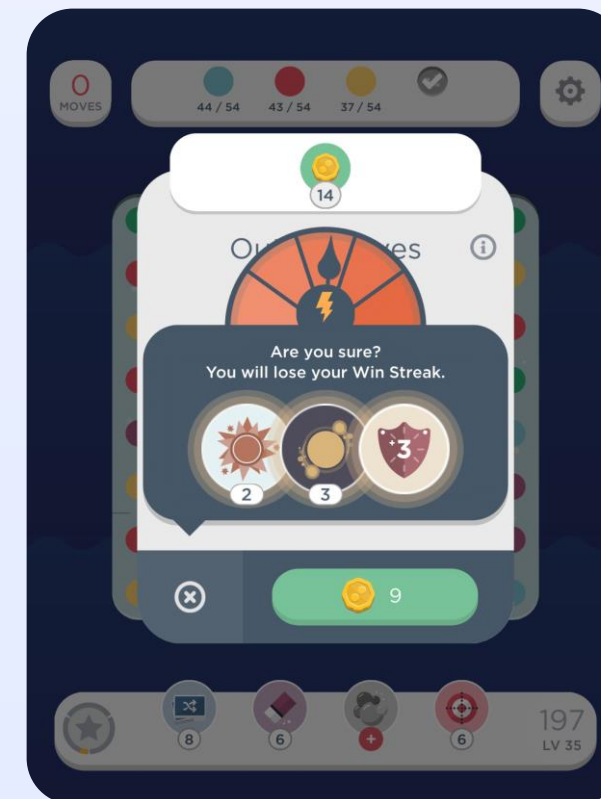
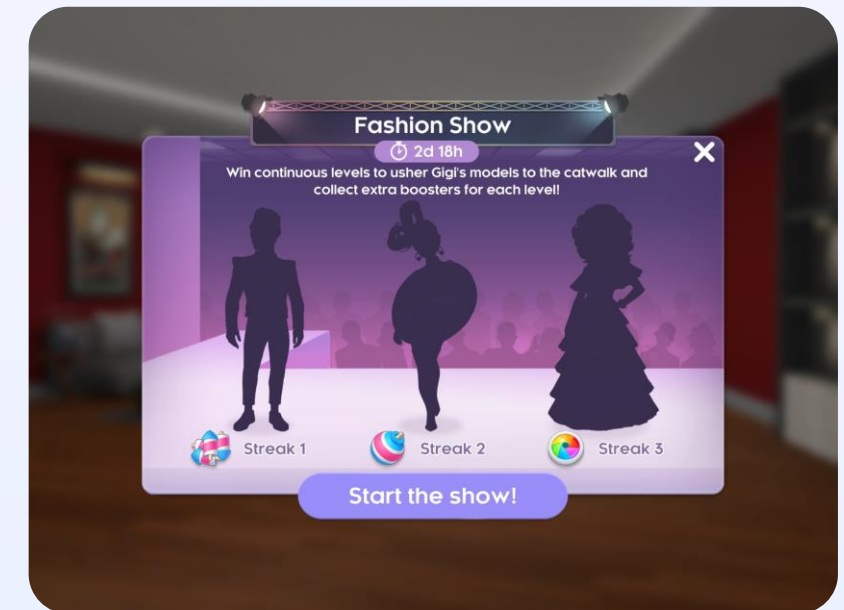
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Chief Game Analyst - US

Loss aversion is a strong motivational driver. Losing something feels worse than just failing. This is the reason why we're seeing more and more different types of "Win Streak"-elements being implemented in various Match3 games. After all, most of their monetization is based on core gameplay help (boosters, extra tries etc.). Win Streak-elements bring even more of an incentive for why players might want to turn to them.

Different games have different methods for where these mechanics are used. They vary from permanent features in the game, separate events, to Battle Pass progression built around the mechanic etc.

For more detailed case-by-case examples, check out the GameRefinery service and/or contact us directly!



Source: GameRefinery SaaS Dashboard















Motivations

- The motivation framework
- Top game's motivation comparison

GameRefinery's Motivation Framework

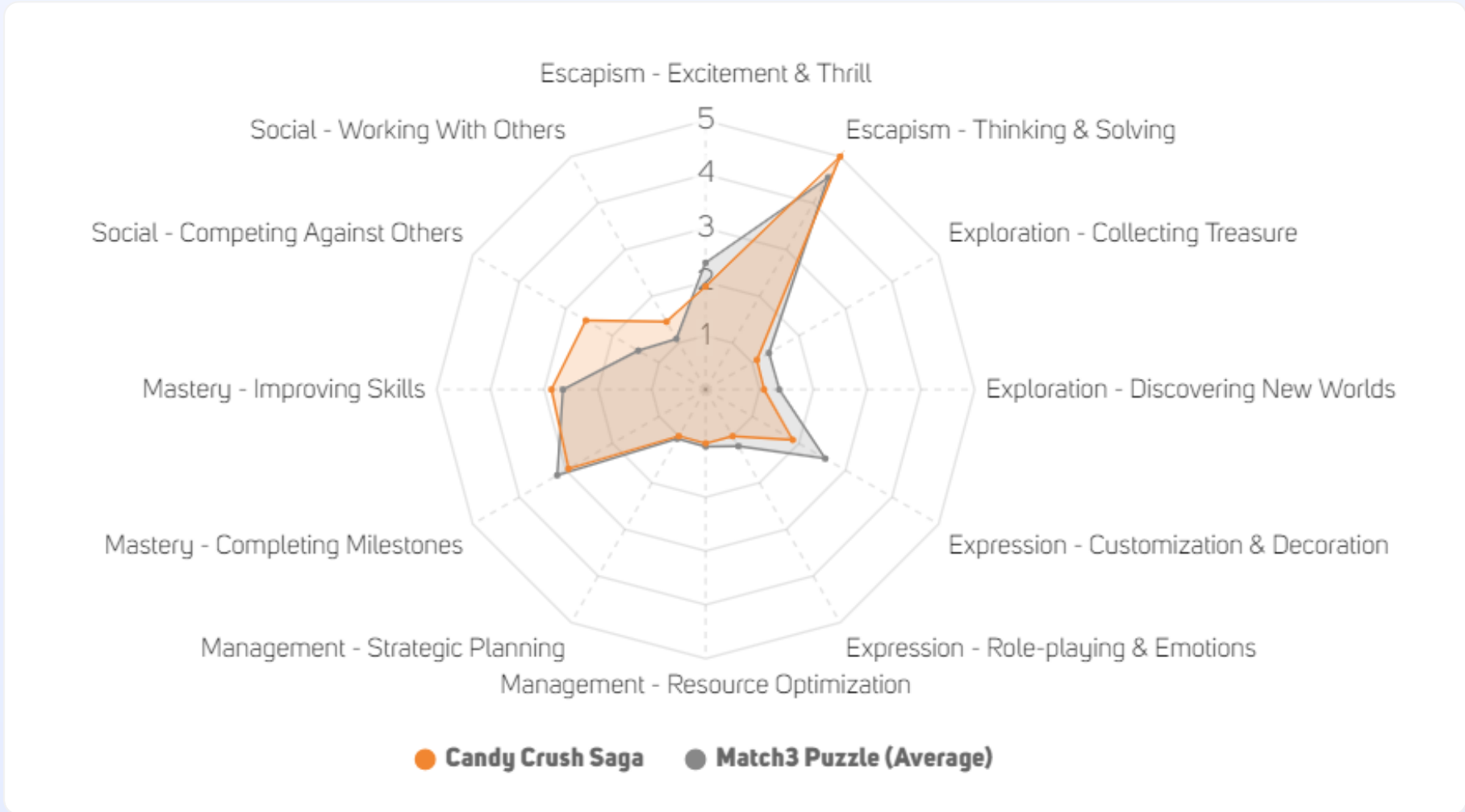
- GameRefinery uses a proprietary motivation model consisting of twelve different Motivational Drivers, each covering a separate player root motivation.
- These Motivational Drivers are also grouped based on their nature to form meaningful pairs or “motivational groups” - for example Improving skills and Completing Milestones fall under Mastery.
- Motivation results are based on a survey including over 7000 respondents. The survey was targeted towards mobile game players in English speaking western countries (US, UK, Canada, New Zealand and Australia). The sample is representative of the smartphone users when it comes to age, gender, income and household size.

 Social - Working With Others	 Expression - Role-playing & Emotions
 Social - Competing Against Others	 Expression - Customization & Decoration
 Mastery - Improving Skills	 Exploration - Discovering New Worlds
 Mastery - Completing Milestones	 Exploration - Collecting Treasure
 Management - Strategic Planning	 Escapism - Thinking & Solving
 Management - Resource Optimization	 Escapism - Excitement & Thrill



Motivational Drivers of Candy Crush Saga vs. Match3 games in general

Motivational drivers describe the main reasons players enjoy playing the game



Score 5 = very important, 1 = not important



Erno Kiiski
Chief Game Analyst - US

Candy Crush Saga has quite a similar profile vs. Match3 games overall, but it scores higher in “social” related motivations because of its stronger social features, co-op, competitions etc. which encourage interaction with other players.

Motivational Drivers of Candy Crush Saga vs. Match3 games in general

Motivational drivers describe the main reasons players enjoy playing the game.

Motivation	Importance 	Importance 	Importance 
 Escapism - Thinking & Solving ?	<div><div></div><div></div><div></div><div></div><div></div></div> 5.0	<div><div></div><div></div><div></div><div></div><div></div></div> 5.0	<div><div></div><div></div><div></div><div></div><div></div></div> 5.0
 Mastery - Completing Milestones ?	<div><div></div><div></div><div></div><div></div><div></div></div> 3.1	<div><div></div><div></div><div></div><div></div><div></div></div> 3.0	<div><div></div><div></div><div></div><div></div><div></div></div> 2.6
 Mastery - Improving Skills ?	<div><div></div><div></div><div></div><div></div><div></div></div> 3.0	<div><div></div><div></div><div></div><div></div><div></div></div> 2.1	<div><div></div><div></div><div></div><div></div><div></div></div> 2.2
 Social - Competing Against Others ?	<div><div></div><div></div><div></div><div></div><div></div></div> 2.6	<div><div></div><div></div><div></div><div></div><div></div></div> 2.1	<div><div></div><div></div><div></div><div></div><div></div></div> 1.2
 Expression - Customization & Decoration ?	<div><div></div><div></div><div></div><div></div><div></div></div> 2.0	<div><div></div><div></div><div></div><div></div><div></div></div> 3.9	<div><div></div><div></div><div></div><div></div><div></div></div> 5.0
 Escapism - Excitement & Thrill ?	<div><div></div><div></div><div></div><div></div><div></div></div> 2.0	<div><div></div><div></div><div></div><div></div><div></div></div> 1.0	<div><div></div><div></div><div></div><div></div><div></div></div> 2.5
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 Management - Resource Optimization ?	<div><div></div><div></div><div></div><div></div><div></div></div> 1.2	<div><div></div><div></div><div></div><div></div><div></div></div> 1.0	<div><div></div><div></div><div></div><div></div><div></div></div> 1.0
 Expression - Role-playing & Emotions ?	<div><div></div><div></div><div></div><div></div><div></div></div> 1.1	<div><div></div><div></div><div></div><div></div><div></div></div> 2.2	<div><div></div><div></div><div></div><div></div><div></div></div> 3.2
 Exploration - Collecting Treasure ?	<div><div></div><div></div><div></div><div></div><div></div></div> 1.1	<div><div></div><div></div><div></div><div></div><div></div></div> 1.9	<div><div></div><div></div><div></div><div></div><div></div></div> 1.8
 Management - Strategic Planning ?	<div><div></div><div></div><div></div><div></div><div></div></div> 1.0	<div><div></div><div></div><div></div><div></div><div></div></div> 1.0	<div><div></div><div></div><div></div><div></div><div></div></div> 1.0
 Exploration - Discovering New Worlds ?	<div><div></div><div></div><div></div><div></div><div></div></div> 1.0	<div><div></div><div></div><div></div><div></div><div></div></div> 2.2	<div><div></div><div></div><div></div><div></div><div></div></div> 1.6

Score 5 = very important, 1 = not important



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Gardenscapes/Homescapes innovated with “decoration” meta gameplay back in the day which diversified the Match3 experience from being just all about puzzles.

Now if we look at the latest massive hit on the market, Project Makeover, it taps into the same “Customization & Decoration” motivation, but it ties with it even stronger. With it’s meta gameplay, it combines home makeover aspects to people’s visual appearance makeovers.



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Chief Game Analyst - US

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You can also schedule a live demo by contacting yours truly at erno@gamerefinery.com

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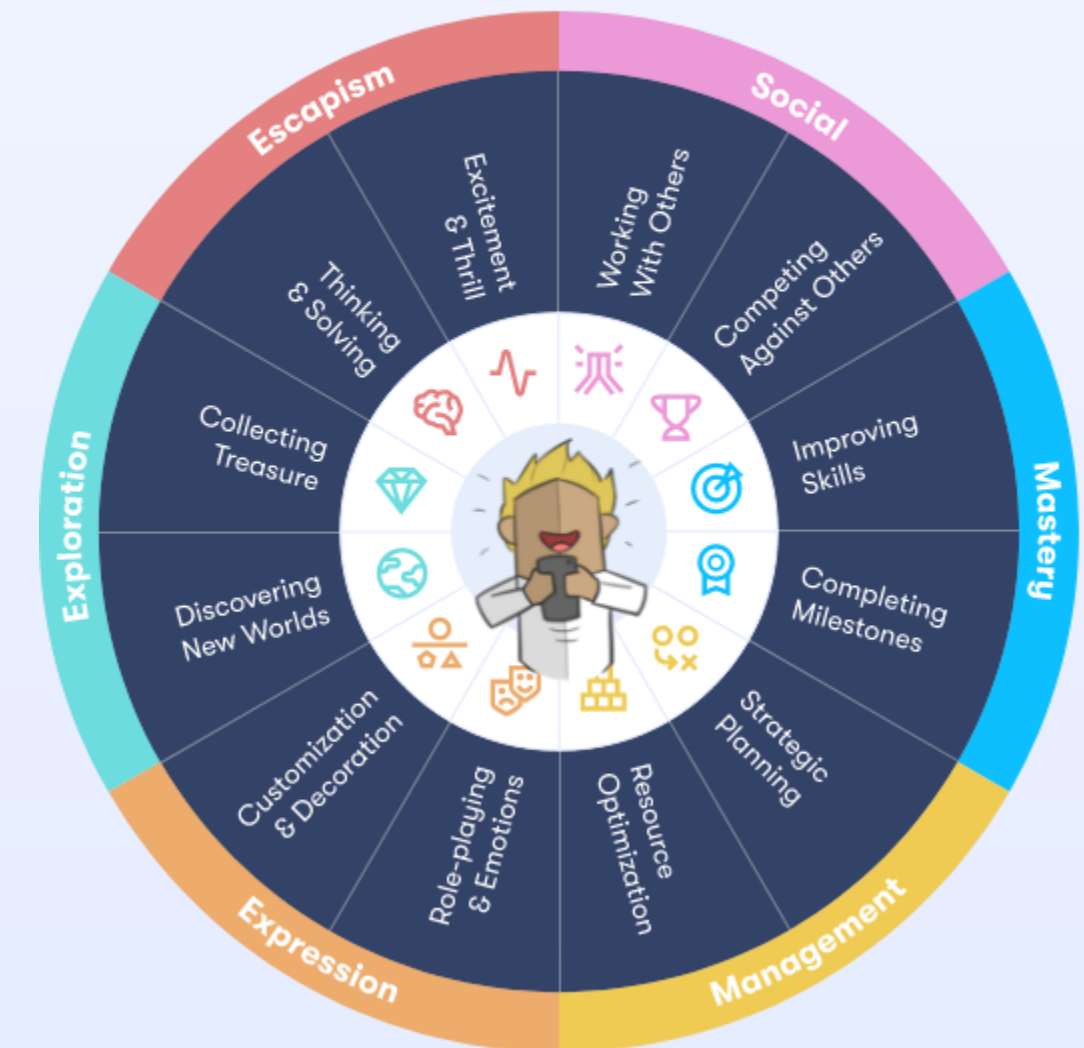
GameRefinery
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We Know Mobile Games

We answer not just what is happening on the market but why and how it is happening

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12 Player Motivations



1. Choose Market

US

2. Select optional categories

GENRES

Casual, Mid-core

SUBGENRES

Build & Battle

3. Select optional Filter

Session Length Game Progression

Gacha Tap & Monetization

Live Events Appointment Mechanics

Clash of Clans
Supercell

Build & Battle

FEATURE INDICATORS

Powerscore 82

Skill Thinking

MONTHLY PERFORMANCE

Average Grossing Rank 10

Average Download 195K

REV / DL \$30.1