



Casino Report

Competitive research and actionable product recommendations

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MAY



2018

INTRODUCTION



Dear Product Owner,

The Supreme Court recently gave states the go-ahead to legalize sports gambling ([1](#)). This is a win for our industry in light of GDPR, the Washington State ruling, and the Belgian Gaming Commission's recommendation to prosecute illegal loot boxes ([2](#)). Game creation is a privilege, and we have a bright future—so long as we continue to act with responsibility and integrity.

In this report, you will see references to new Player Personas ([3](#)). These were designed by a group of professors at the University of Turku in Finland, and provide a foundation for player segmentation throughout all game genres ([4](#)).

Two callouts from this month's Market Watch: Monopoly Slots by SGI hard launched April 9th and is currently the 59th top grossing U.S. iOS Casino category game ([5](#)). In addition, Poker Heat released *Daily Streak* as a permanent feature with a bonus for payers ([6](#)). This feature was detailed in the March 2018 Casino Report ([7](#)).

The *Unconventional Feature of the Month* award goes to the Slotomania team for their free, limited edition, *Old Man's Gold T-Shirt* with coin purchase ([8](#)).

"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

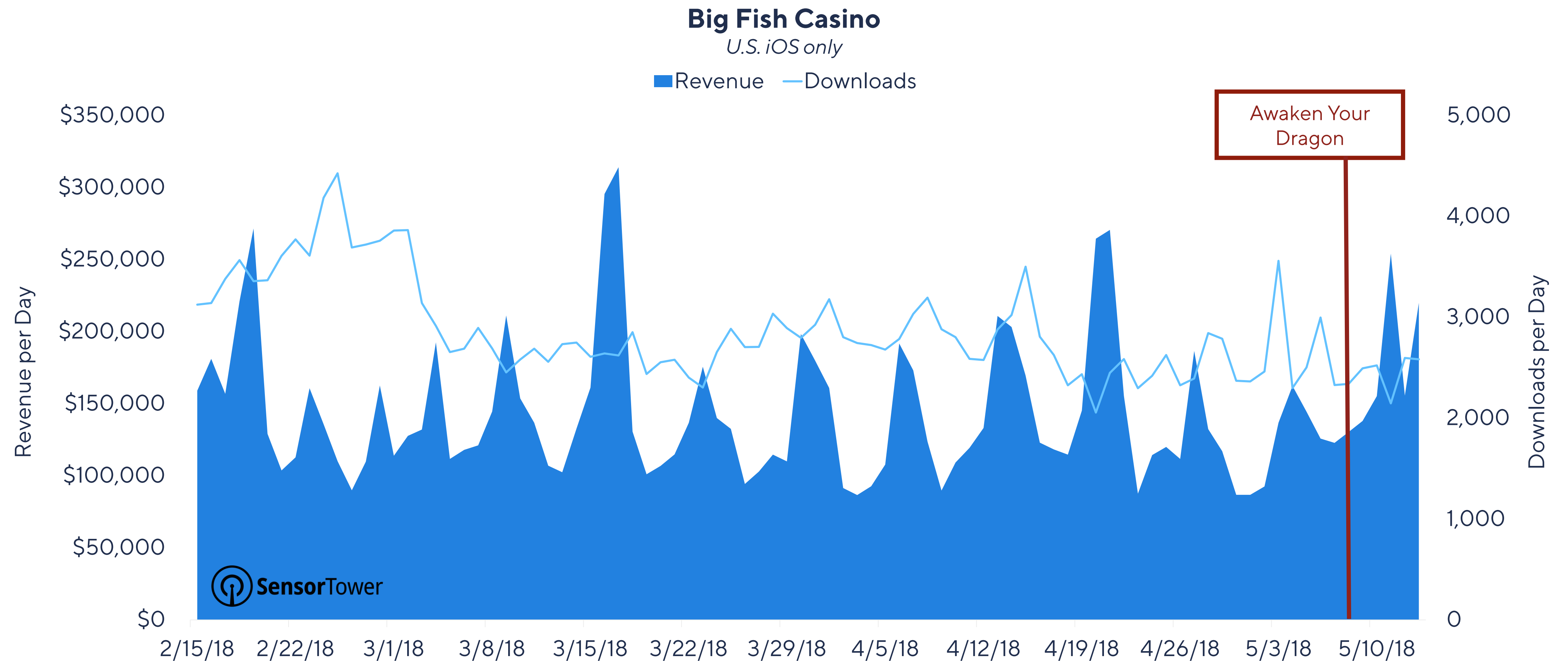
Brett Nowak
Editor-in-Chief

REVENUE DRIVERS

UNLOCKING AVATARS

IMPACT ANALYSIS

Big Fish Casino revenue increased 66% WoW, and 26% Wo2W during the *Awaken Your Dragon* release



PRODUCT INSIGHTS

Qualifying bets earn points to unlock avatar *Dragon Frames*. Perks are awarded to all players in a room when a player with a *Frame* enters

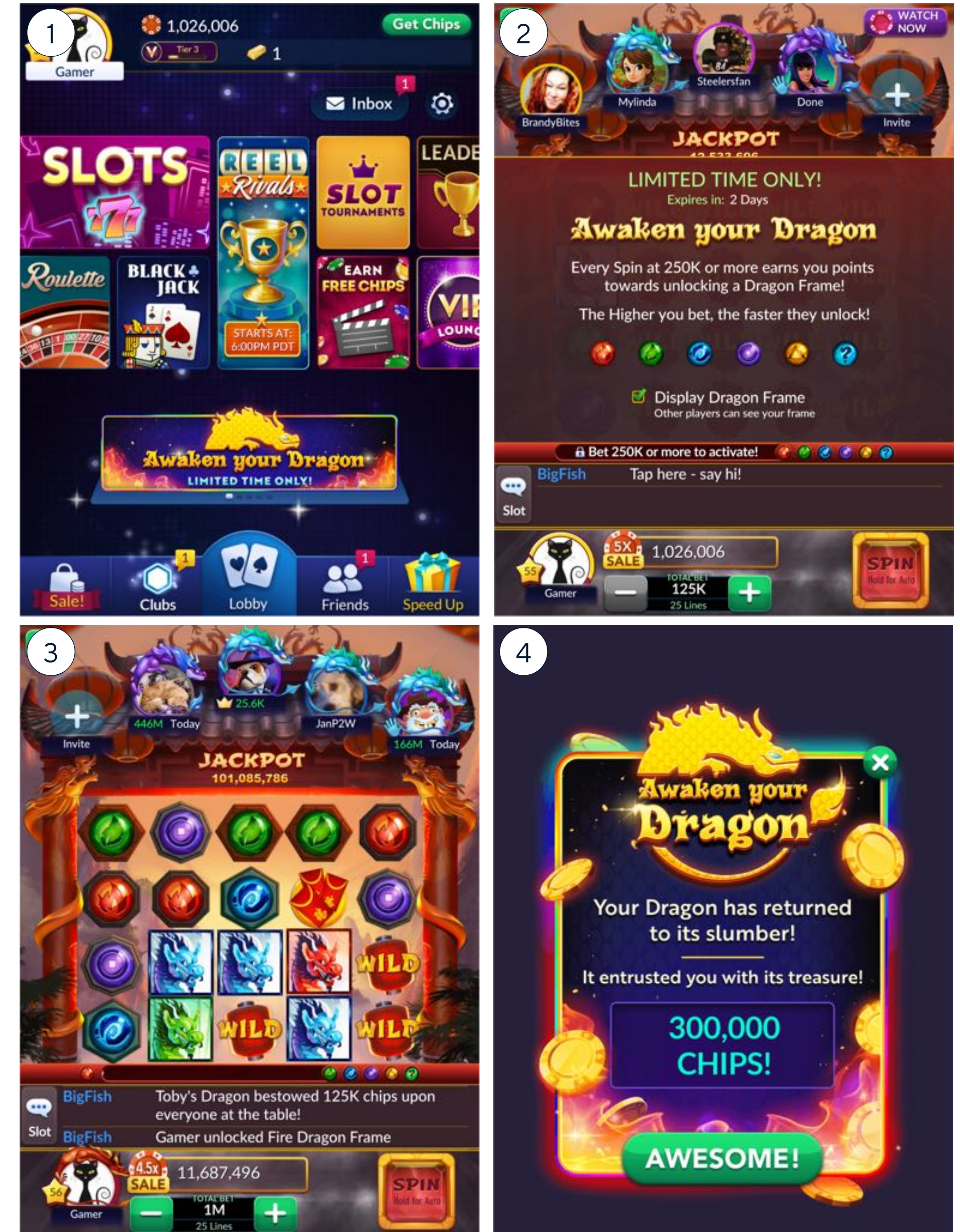
Feature Details

- A spin to win event is marketed to players on app-entry (1)
- Qualifying bets in the *Dragon 5* machine earn points to unlock avatar *Frames* (2)
- There are 6 *Frames* to unlock. When a player who possesses a *Frame* joins a room, a chip bonus is awarded to all players in the room (3)
- Players can choose to display the *Frames* for 7 days after the event ends. Players receive a chip reward when their *Dragon* is removed (4)

Key Takeaways

- Cosmetic-based revenue is a growth opportunity for social casino apps. Big Fish Casino is already capitalizing on this with *Awaken Your Dragon*
- Cosmetic benefits must be visible to other players—so this mechanic will work best for socially-constructed apps with social lobbies and tables
- Fortnite is completely free to play, yet it grossed [\\$223MM in March](#). This supports the concept that games can monetize a cosmetic-based revenue model to a broader audience of U.S. players
- Adopt some best practices from Fortnite: 1) make cosmetics limited edition, 2) drop cosmetics frequently, 3) tie cosmetic rewards to a limited-time challenge card (called *Battle Pass* in Fortnite) and, 4) add a tiered system to award payers and highly-engaged players more cosmetics (see this [Fortnite Teardown](#) for more information)

[Click here for more on Awaken Your Dragon >>](#)



FEATURE SNAPSHOT

Integrating avatar unlocks into the core gameplay may be more costly. However, the payoff is greater impact and longevity with future avatar releases

Additional Information

- [Awaken Your Dragon](#) - Big Fish Casino
- Release: 5/7/18
- [Player Types](#): Companion, Adventurer

Related Features

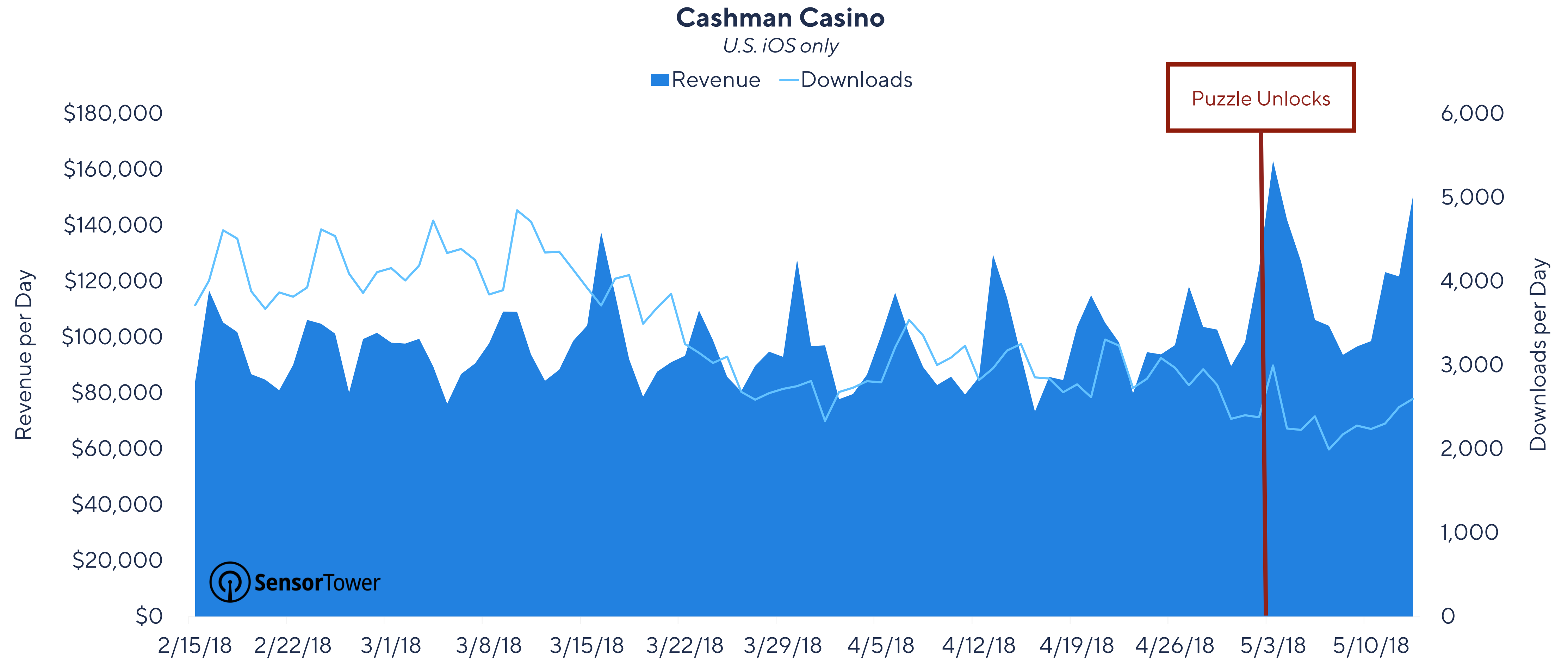
- [Safe Event](#) - Huuuge Casino
- [Experience Leveling](#) - Candy Crush Saga
- [Scary Pranks](#) - Seekers Notes Hidden Mystery



PUZZLE UNLOCKS

IMPACT ANALYSIS

Cashman Casino was up 51% WoW, and 42% Wo2W for the 3-day period surrounding a puzzle-unlocking machine release



PRODUCT INSIGHTS

Cashman Casino released a spin to win mechanic unlocking early machine access and *another* spin to win challenge with machine access

Feature Details

- A puzzle is presented to players at game-entry (1)
- Players spin in any machine to collect puzzle pieces (2)
- Completing the puzzle unlocks early access to the new machine (3)
- A daily spin to win challenge is also unlocked with additional rewards (4)

Key Takeaways

- Add challenge-based unlocking systems to special machines *only*. This avoids player burnout with this type of mechanic
- Test giving players a certain amount of spins on the new machine *before* locking it with challenges
- Release a daily challenge for 3-4 days leading up to the full machine release. The first day's challenge should be the hardest ... and each day the challenges should become easier to naturally segment the players by desire
- Unlock the machines to payers automatically on day 2, making them feel *special*, and increasing transactions per payer
- Once players unlock the machine, add a tiered system to the machine-specific challenges (see [SlotoQuest](#) as an example)

[Click here for more on Lightning Link Tiki Fire >>](#)



FEATURE SNAPSHOT

This relatively inexpensive feature increases and extends the impact of major slot machine releases, while being highly skinnable with new machine releases

Additional Information

- [Lightning Link Tiki Fire](#) - Cashman Casino
- Release: 5/3/18
- [Player Types](#): Mercenary, Companion, Adventurer

Related Features

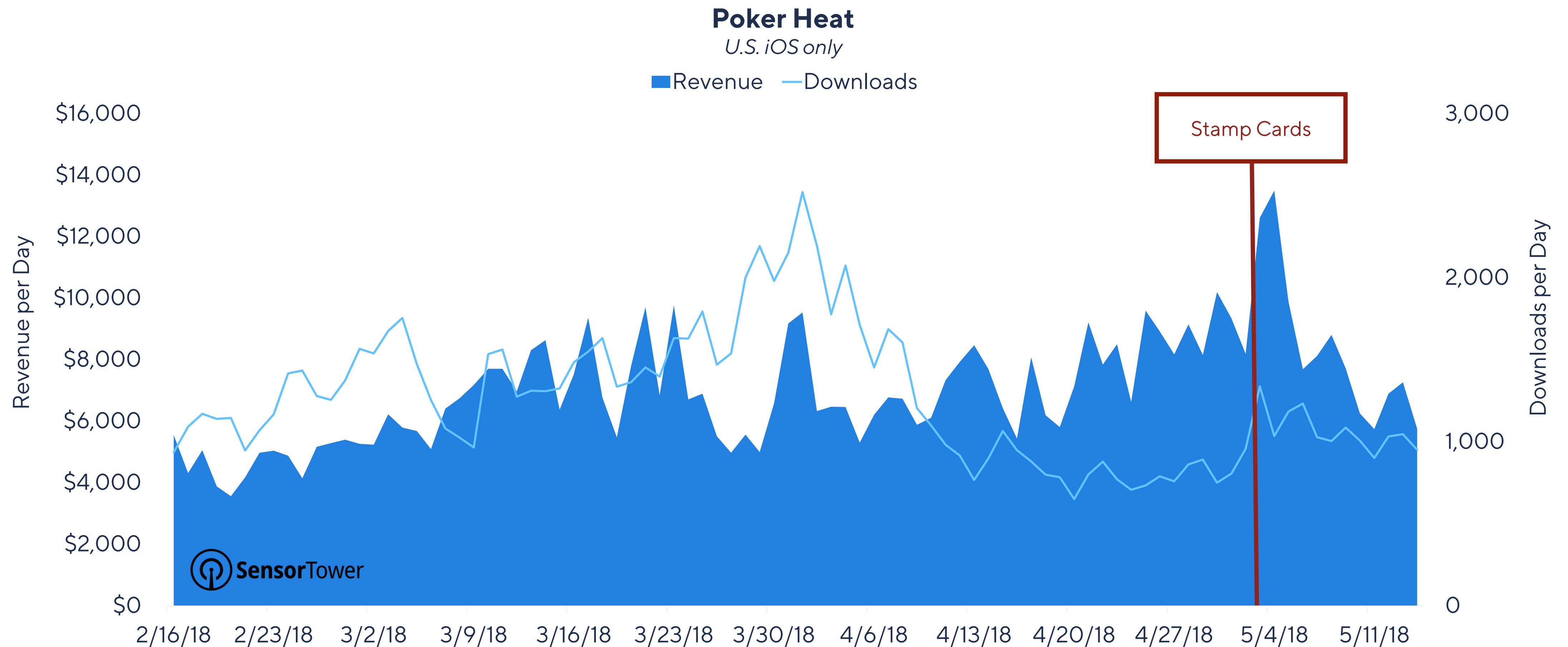
- [Unlock Mystery Game](#) - Cashman Casino
- [Spin to Unlock](#) - Quick Hit Slots
- [Spin to Unlock](#) - High 5 Casino



STAMP CARDS

IMPACT ANALYSIS

Poker Heat revenue spiked 35% WoW, and 71% Wo2W for the 3-day period surrounding the *Stamp Card* release



PRODUCT INSIGHTS

In Poker Heat, any purchase includes a stamp towards *Stamp Card* completion. Filling the card with 4 stamps awards a free coin package

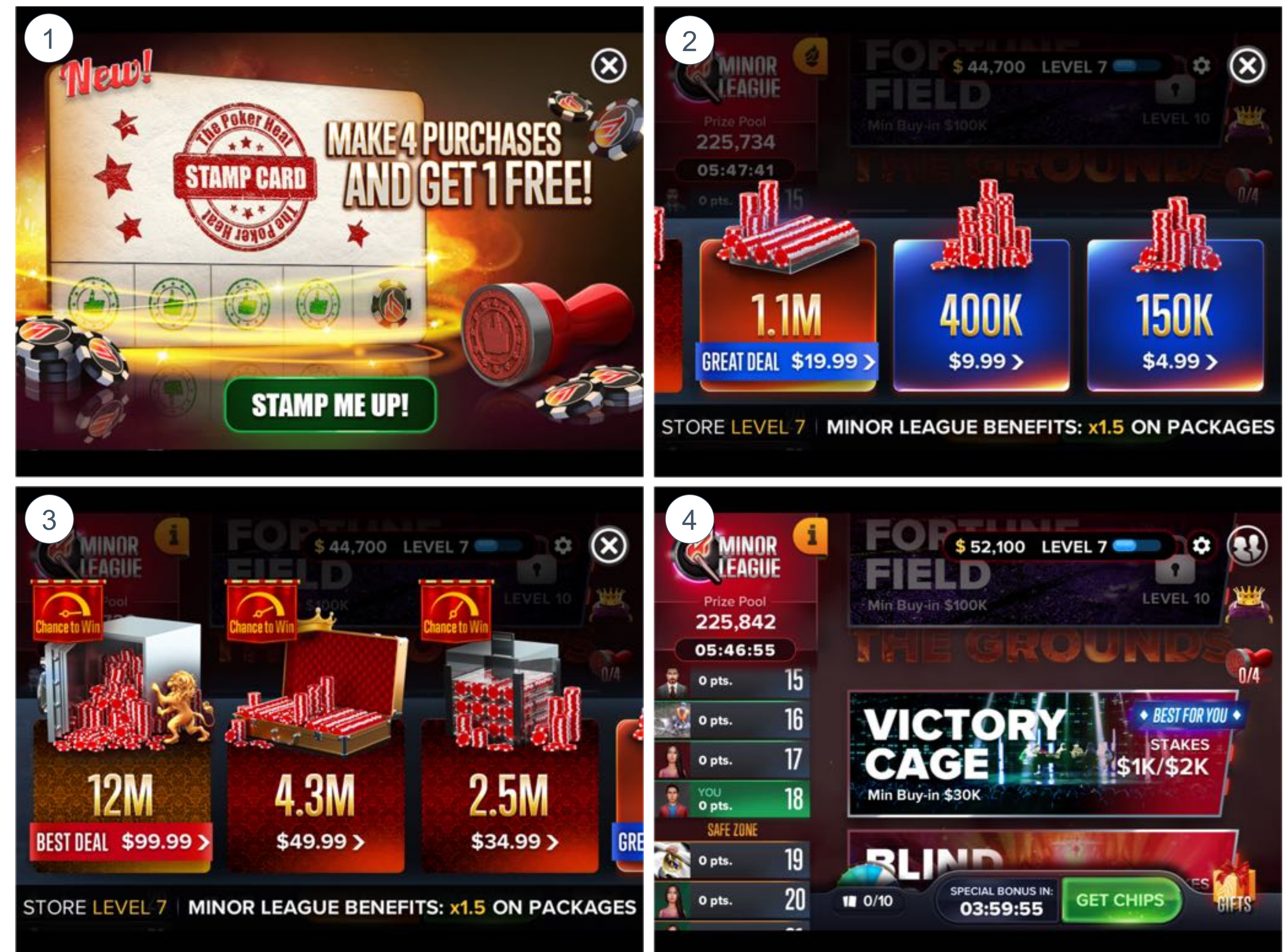
Feature Details

- The new purchase feature is announced on app-entry (1)
- Any purchase assigns 1 of 4 stamps needed to complete the card (2)
- A 'Chance to Win' meter is displayed above certain packages (3)
- A *Stamp Card* icon showing player progress is visible from the main lobby (4)

Key Takeaways

- Adding mechanics to the buy page, because of its proximity to a purchase action, is an impactful way to drive transactions
- The major risk of this feature is the inflationary impact of a free coin package. To keep the benefits of a *Stamp Card* mechanic while decreasing the risk ... award non-coin based prizes, like exclusive machines, boosted VIP tiers, or cosmetic awards (see [Unlocking Avatars](#))
- Consider implementing a progress bar as opposed to a stamp, so that the progression system can be adjusted according to a player's purchasing history. For new players, the progress bar would award 25% with each purchase. For more engaged payers, the bar would award 10% with each purchase. A progress meter easily allows for this built-in personalization
- If you plan to release this feature with coin-based rewards, be prepared to release a coin sinking feature afterwards. Poker Heat took this feature away (likely due to wallet inflation)

[Click here for more on Stamp Card >>](#)



FEATURE SNAPSHOT

Stamp Cards are cheap to implement. Impact is notable in driving payers from their second to fourth transaction

Additional Information

- [Stamp Card](#) - Poker Heat
- Release: 5/3/18
- [Player Types](#): All

Related Features

- [Stamp It](#) - Slotomania
- [Unlock Special Package](#) - DoubleU Casino
- [BOGO](#) - Jackpot Party



MARKET WATCH

4/15/18 – 5/14/18

NOTABLE FEATURES I

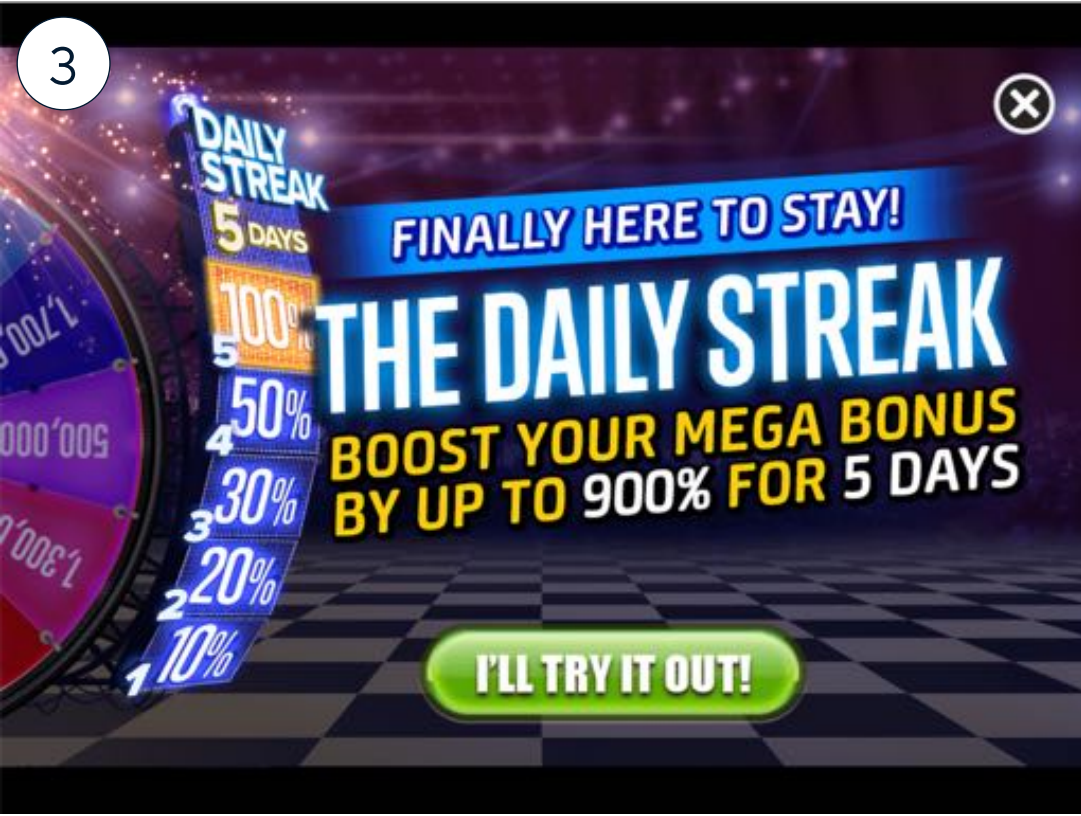
App	Notable Release	More Information
Slotomania	Daily Dash	Players complete daily challenges for <i>Dash Points</i> and coins (1)
DoubleDown Casino	High Limit	Coming soon: <i>High Limit</i> room with early access and jackpot bonuses
House of Fun	HOF Legends 2	Second <i>HoF Legends</i> collection released with higher rewards (2)
Huuuge Casino	Milestone Rewards	Level up slot machine replaced by rewards feature
WSOP	Mini Game Update	Update to at-table mini-stepper slot machine shown to players waiting for the next hand
	WSOP Club	Tiered <i>League</i> play now available with additional benefits (3)



NOTABLE FEATURES II

App	Notable Release	More Information
Jackpot Party	Party Payout	Purchase to unlock rewards coins daily for 5 days
Wizard of Oz	Refund Time	Qualified purchases unlock 5% refund (1)
Hit it Rich	Greatest Hits	Community spin to win event, progressing down a path for a jackpot (2)
my KONAMI	Daily Challenges	Coming soon: Daily challenges
Wonka Slots	Treats	Economy change and coin rebalance
Poker Heat	Daily Streak	Previously released event now a permanent feature with a purchase to boost bonuses and daily streaks (3)

[Click here](#) for the full list of content released this month with links to more in the [Feature Database](#)



APPENDIX

PLAYER 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 and Assault	Journey	Assault	Coordinate
Lowest preference(s)	Care	Assault	Care	Manage and Care	Assault	Journey and 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 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 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

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– Warren Buffett

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