



**LIQUID & GRIT**

## Casino Report

Competitive Research and Actionable Product Recommendations

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OCTOBER

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2018

# STRATEGY INSIGHTS



# ZYNGA POKER REVENUE DROP



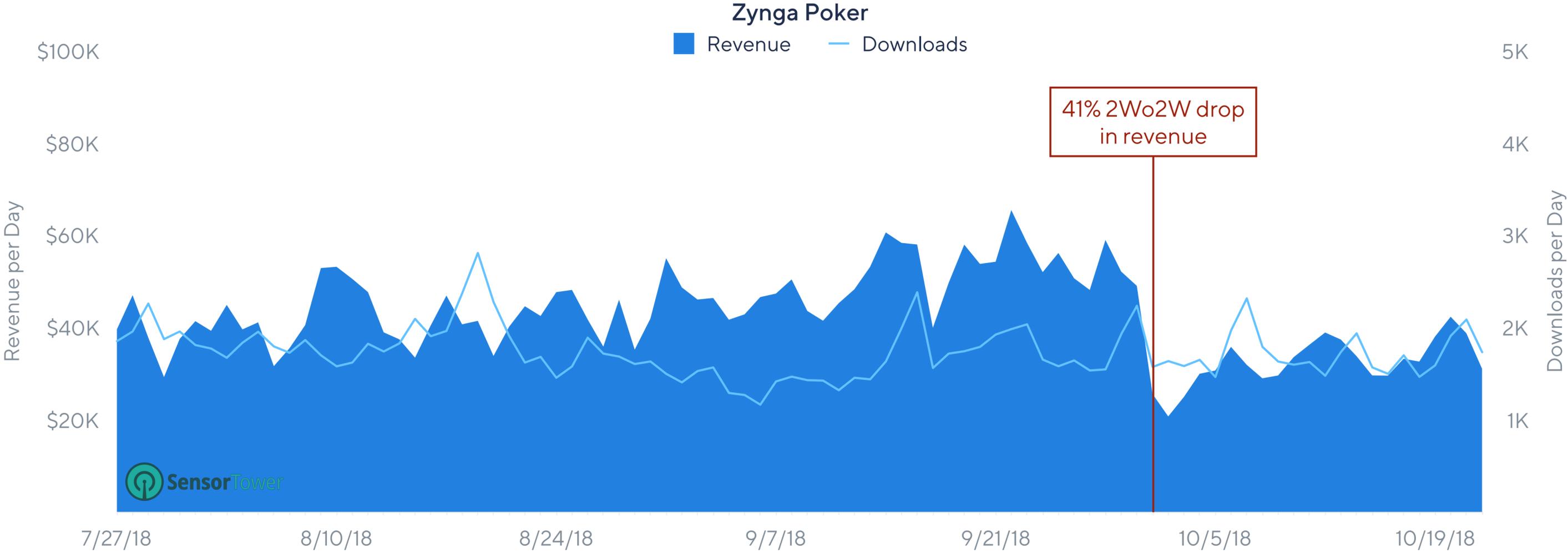
Zynga Poker revenue dropped 41% 2Wo2W across all GEOs and on both Android and Apple ... suggestive that this decline is product-related and possibly tied to FB Connect. Downloads remained constant and revenue appears to be recovering

### Recent Feature Releases

- [UI Update](#) 8/19/18 release was, 'Largest Update of the Year'
- [Level Up Rewards](#)
- [Sit-n-Go Update](#)

### Additional Data Points

- Top IAP was unchanged
- Player comments in forums about lacking sales from 10/1 - 10/4



\*Graph data is iOS U.S. only

# REAL-WORLD EVENTS

Slotomania launched a *Bus Tour* for loyal players along the California Coast ... stopping at major cities for real-world scavenger hunts and events

For city-wide scavenger hunts, Slotomania partnered with the team behind [Hidden Cash](#) (an event run in 2014 that hid money in major U.S. cities, planting clues on Twitter)

**Slotomania General Manager, Ofer Kinberg:** As a pioneer in the industry, we continuously challenge ourselves to develop exciting and innovative ways to engage with our players and to build a strong sense of community. Slotomania is a fun and entertaining experience for all, and this bus tour is a wonderful opportunity to bring the spirit of the game to life with our West Coast players. ([more info](#))



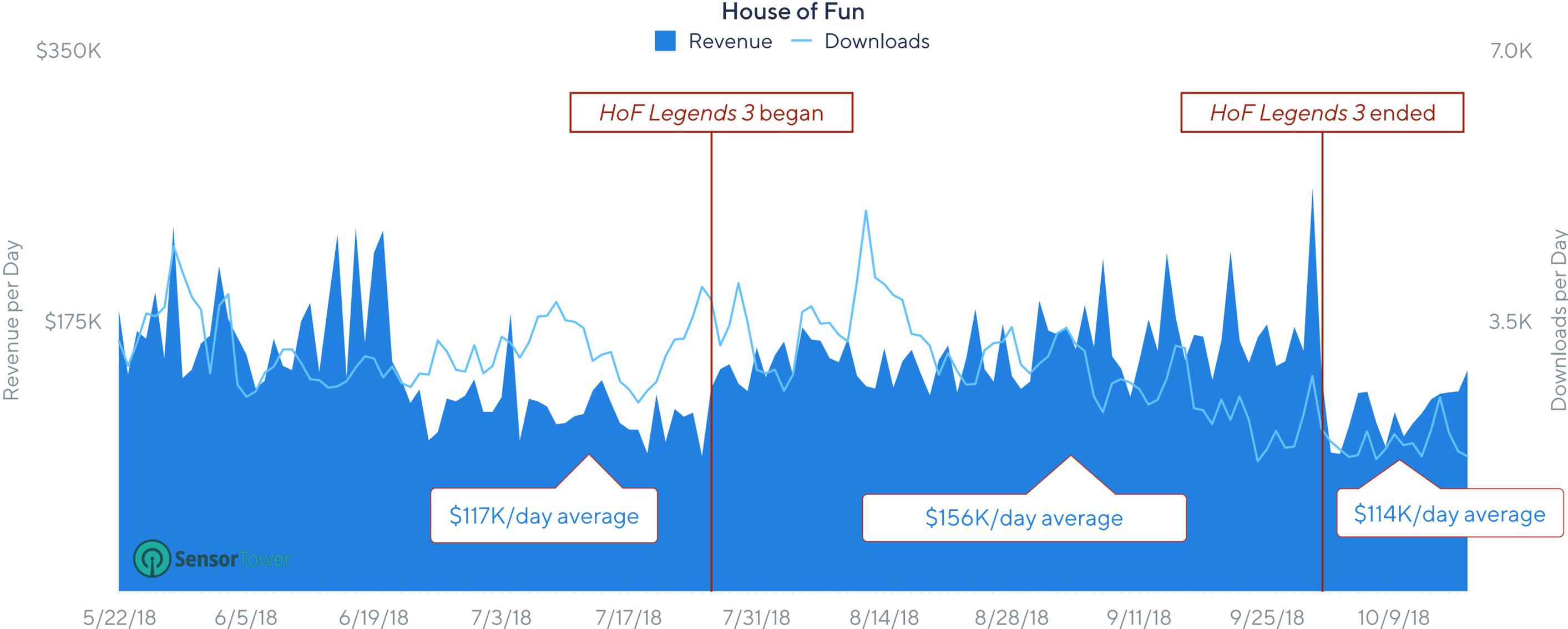
# REVENUE DRIVERS



# HoF LEGENDS CONTENT RELEASES

# IMPACT ANALYSIS

House of Fun revenue was 32% above baseline during the 10-week period of *HoF Legends 3*. Revenue returned to baseline at the conclusion of *HoF Legends 3*



\*Graph data is iOS U.S. only

# INSIGHT & ADVICE

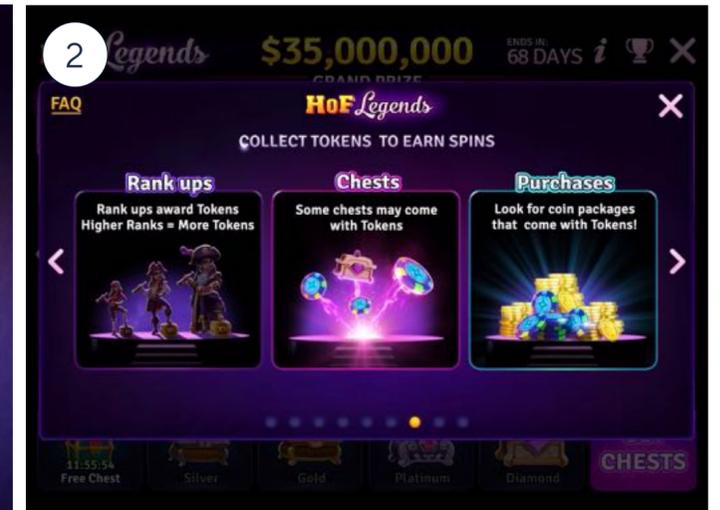
Add a feature-specific currency for a relatively cheap re-engagement mechanic that also makes purchases more rewarding. Design new features backwards ... starting with the event system first

## Feature Details: HoF Legends 3

- Payouts were changed and a currency, prize wheel, and *Legends* released (1)
- *Tokens* (the new currency) are earned by ranking up *Legends*, *Chests*, and purchases (2)
- Players spend *Tokens* on *Super Spins* (3)
- There are three levels of *Super Spin* wheels (4 & 5)
- Players unlock higher level wheels by ranking up *Legends* (6)
- The grand prize increased 17% and lower *Legends* rank-up rewards were adjusted

## Key Takeaways

- Provide a sense of awe in each collectible with well-designed items and animations. The desire for awe in games is similar to the allure of Action-genre movies ... which account for 20% of total box office revenue ([read more](#))
- Design the temp-feature/event system experience first. Then, form a feature that supports repeatable, engaging event-based content
- Continue to add more items to purchase packages. On the buy page, make the visuals depict better value with larger packages (potentially by increasing the size of each add-on item). This is more important in multi-level *Chest* systems
- Early adoption of timed events is critical. To boost initial engagement, reduce the amount of time to open a free *Chest* for new collectors
- Eventually, let players purchase *Chests* directly to 1) establish a clear value of *Chests*, and 2) give payers a last-minute option to complete their collections. Consider adding an event-specific, player-personalized payment package to the buy page banner



# HoF LEGENDS 2 & 4

In *HoF Legends 2* release, the flows were shortened for highly-engaged players, payouts were adjusted, and medals were replaced by a progress bar. In the newest release, *HoF Legends 4*, payouts were tweaked

### HoF Legends 2 changes

- A bunch of Chests can be collected with a single click (1)
- Chests no longer include coins
- Grand prize increased 3x and ranking rewards were adjusted based on rarity
- Displayed rewards changed from Rank 5 to Total Rank Rewards (2)
- Medals were replaced with Legend XP bar (3)
- Legends information tab displayed full list of rewards (4)
- Coins and Chests were adjusted in buy page packages (5 & 6)

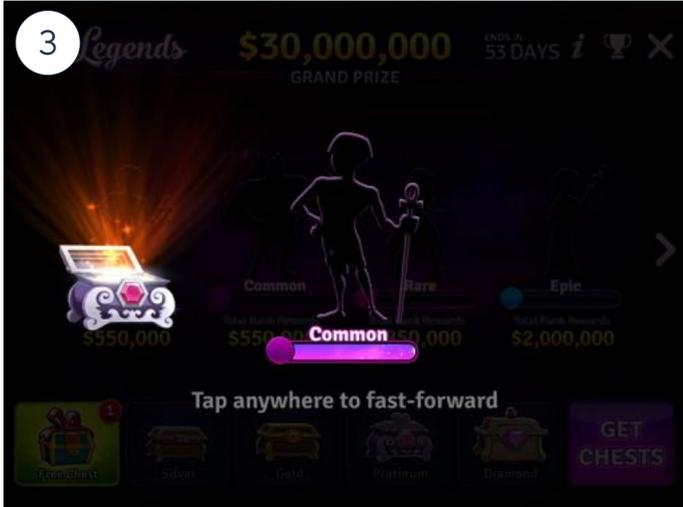
### HoF Legends 3 changes

- Explained in detail on previous page

### HoF Legends 4 changes

- Changes in Chest guaranteed items; small adjustment in Gold and Platinum, and massive 574x increase of Rare and Epic XP included in Diamond Chests
- 43% increase in grand prize with small changes in ranking awards
- Slight decrease in Super Spin cost

[Click here for more images and videos](#)



# FEATURE REFERENCES

For more information on the initial release of *HoF Legends*, review the January 2018 Casino Report. To understand the feature’s economy, download the Feature Economy spreadsheet file online

### Report & Economy References

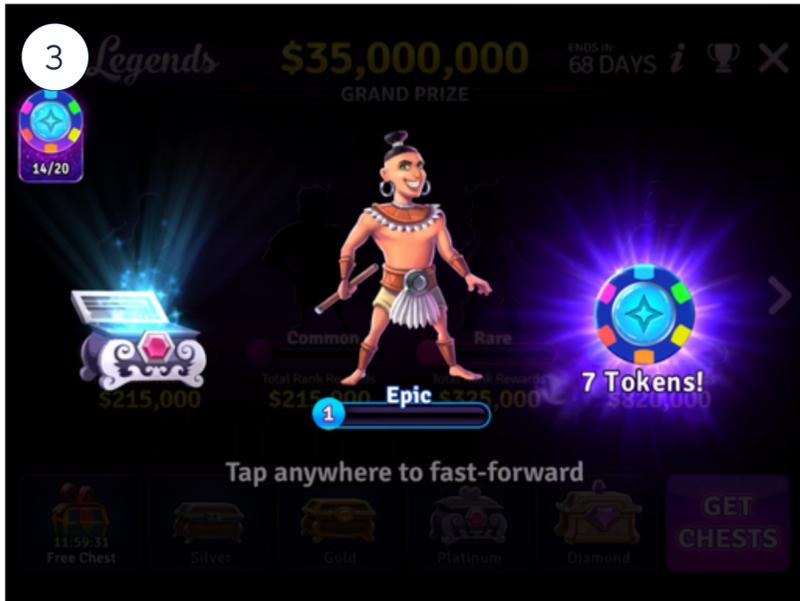
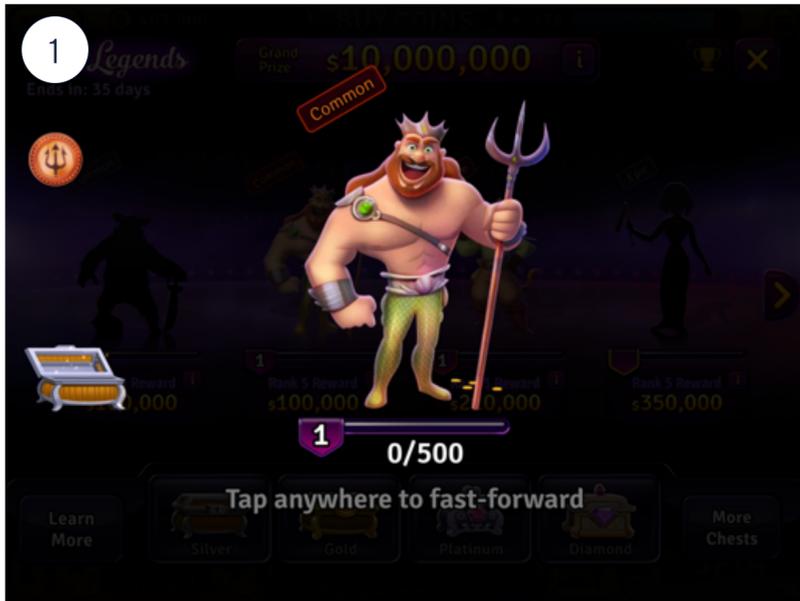
- Legends Collections - [January 2018 Casino Report](#)

### Additional Images

- [HoF Legends 1](#) - House of Fun (1)
- [HoF Legends 2](#) - House of Fun (2)
- [HoF Legends 3](#) - House of Fun (3)
- [HoF Legends 4](#) - House of Fun (4)

[Download the Feature Economy](#)

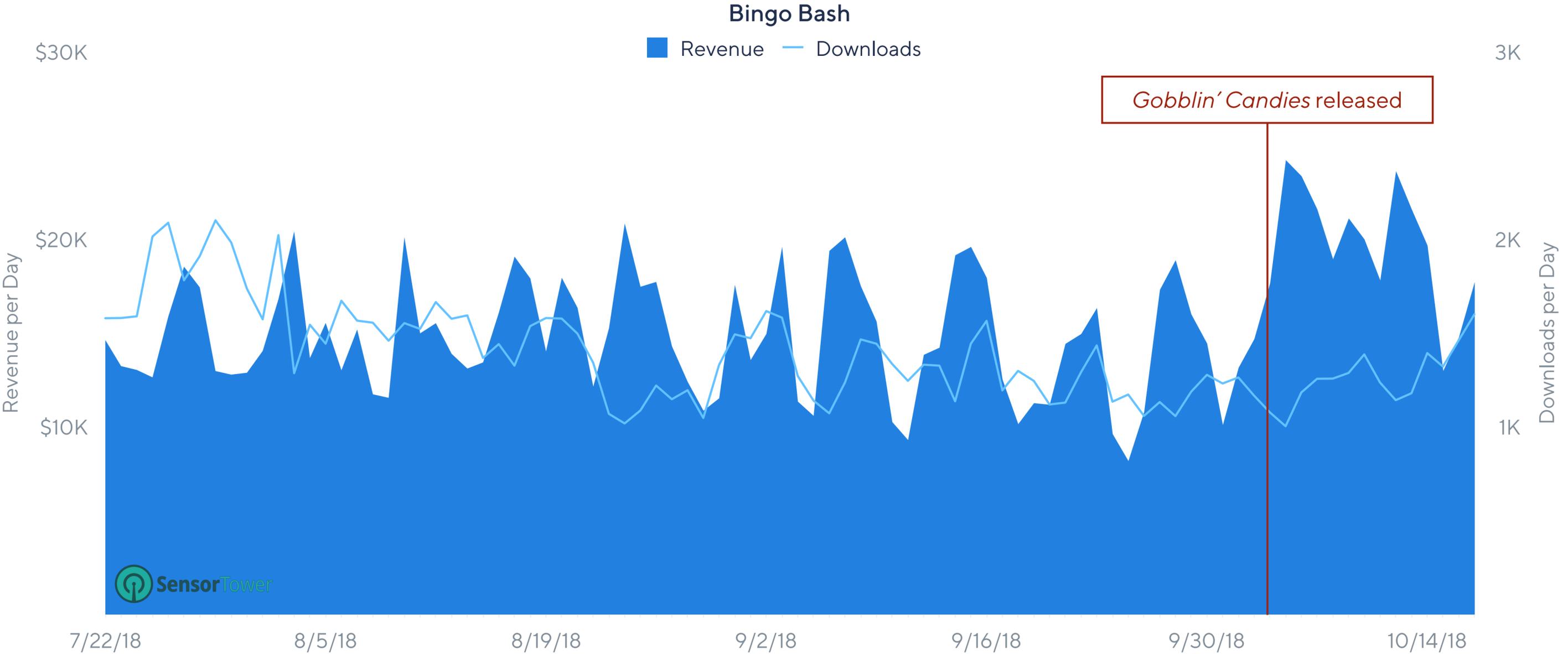
[Ask Us a Follow-Up Question](#)



# **BINGO COLLECT & PROGRESS MINI-GAMES**

# IMPACT ANALYSIS

Bingo Bash drove a 40% WoW, 41% 2Wo2W increase in revenue after the release of the *Goblin' Candies* bingo room



\*Graph data is iOS U.S. only

# INSIGHT & ADVICE

Mimic real-world rewards systems: award for skill, effort and luck. Use familiar mini-games in the base game, while still adding new elements. This will satisfy players' desire for *fresh* game play, while providing the comfort of *familiarity*

## Feature Details

- In the new room, players must daub spaces, allowing the *Witch* to reach two corner *Cauldrons* for a bingo (1)
- Each bingo awards a *Potion* (2)
- *Potions* move all *Goblins* across a Plants vs. Zombies-like board. Collecting 10 *Candy Corns*, which are awarded by daubing yellow spaces, moves a random *Goblin* across the board. And, collecting a *Witch Hat* awards a surprise (3)
- *Premium* mode triggers more items and better quality items (4 & 5)

## Key Takeaways

- The progression and reward system is well-built, rewarding players' expectations of skill, effort, and luck:
  - Players receive a known and significant prize for their 'skill' of hitting a bingo, moving all five *Goblins* one space
  - Players are awarded for their 'effort' by collecting 10 *Candy Corns*, moving a random *Goblin* one space
  - Players can 'Get Lucky' by collecting a *Hat* to win an immediate prize
- Adopting a game mechanic from Plants vs. Zombies makes the mini-game features *familiar*. This *awareness* eliminates unnecessary tutorials and time spent by players to learn non-essential aspects of the mini-game ... allowing the designer to add more sophisticated reward systems without overloading the player with new information

[Click here for more images and videos](#)



# FEATURE REFERENCES

Review how Post-Round Mini-Games increase revenue and Re-Skinnable Mini-Games drive longevity. Also, check out how Outside Genre Mini-Games is utilized in Hidden Object games

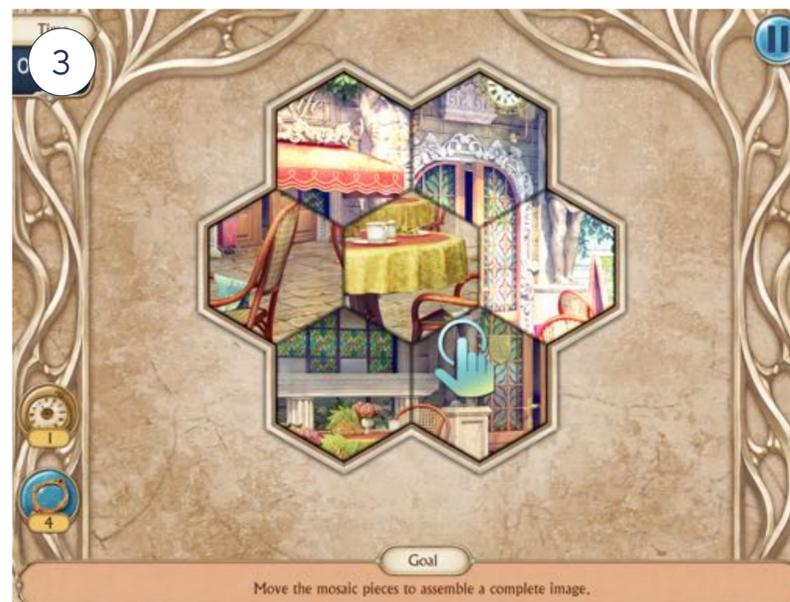
## Report References

- Post-Round Mini-Games - [April 2018 Casino Report](#) (1)
- Re-Skinnable Mini-Games - [February 2018 Casino Report](#) (2)
- Outside Genre Mini-Games - [September 2018 Casino Report](#) (3)
- Collection Sets - [March 2018 Casino Report](#) (4)
- Customized Collection Sets - [July 2018 Casino Report](#)

## Related Features

- [Mommy Marathon](#) - Bingo Bash
- [Super Dice](#) - Bingo Party
- [Spook'N'Roll](#) - Bingo Blitz

Ask Us a Follow-Up Question



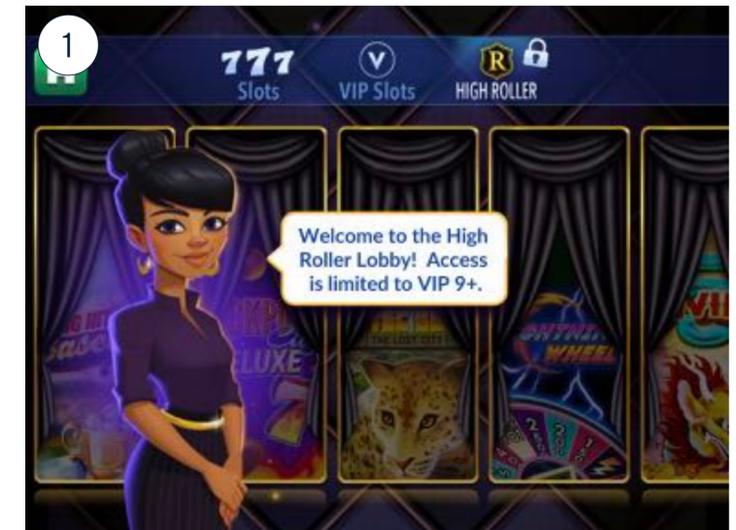
# MARKET WATCH



9/15/18 - 10/14/18

# NOTABLE RELEASES I

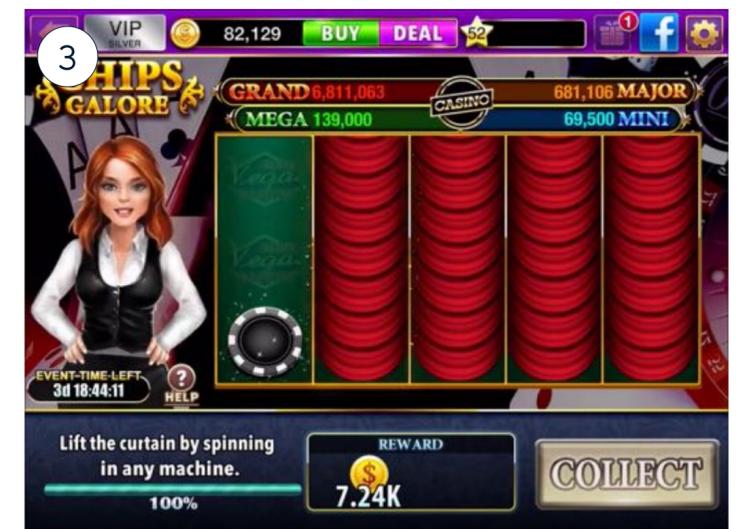
App	Feature	Description
Big Fish Casino	<a href="#">UI Update</a>	UI update to <i>Tabs</i> in the Lobby, including a newly-added <i>High Roller</i> room (1)
House of Fun	<a href="#">Playtika Rewards Update</a>	Loyalty program update with additional benefits to level up bonuses, coin packages, fan page, and email gifts
WSOP	<a href="#">Pick Your Promo</a>	Players choose from three promotions ... each lasting 24 hours (2)
DoubleU Casino	<a href="#">Apple Payment Issue / Troubleshoot</a>	Players receive troubleshooting notice with instructions upon entry to resolve purchasing issues and inform players of the latest iTunes Terms of Service update (3)
Wizard of Oz	<a href="#">Clubs</a>	<i>Clubs</i> social feature added for players level 20 and above. Players work with <i>Clubmates</i> every week to unlock benefits and increase rewards
Caesars Slots	<a href="#">The Nut Hunt</a>	New play to collect event for players to complete missions to help a <i>Squirrel</i> collect <i>Acorns</i> for rewards



# NOTABLE RELEASES II

App	Feature	Description
Hit it Rich	<a href="#">Casino Friends</a>	In-app friending option giving players an alternative to social network friending. Players now have the ability to find and added friends from within the app (1)
Quick Hit Slots	<a href="#">Monopoly Cruise for Cash</a>	Spin to collect event for players to collect <i>Monopoly Game Tokens</i> , building a <i>Cruise Ship</i> . Prizes include in-game awards and entries to win a Caribbean cruise vacation (2)
Classic Vegas Casino	<a href="#">Chips Galore</a>	Players spin in any machine to lift <i>Curtains</i> , awarding coins and chips for the <i>Chip Slots</i> Lightning Link-type respin feature (3)
Bingo Showdown	<a href="#">Gold Rush</a>	Purchasing power-ups and bingo play awards <i>Barrels</i> of supplies for players to craft an <i>Inventory</i> item for <i>Tickets</i> , booster, and <i>Badge</i> rewards
Poker Heat	<a href="#">Lunching Special</a>	Players connecting to the <a href="#">Personal VIP Agent</a> earn a gift bundle of: 1hr <i>Cashback Craze</i> , 1hr <i>Crown Bar Booster</i> , and <i>Chips</i>

[Full list of content released this month](#)



# APPENDIX



# PLAYER MOTIVATIONS

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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 the [Jobs to be Done](#)

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

# PLAYER PERSONAS

	Stealthy Steve	Friendly Fran	Destructive Derek	Adventuring Adrian	Prospecting Polly	Daring Dan	Gathering Grace
<b>Gender</b>	76% male	72% female	73% male	55% male	78% female	69% male	71% female
<b>Mean age</b>	31.6	40.8	37.8	31.5	42.3	39.6	45.3
<b>Highest preference(s)</b>	Assault	Care and Manage	Manage	Journey	Journey and Coordinate	Assault and Coordinate	Coordinate
<b>Lowest preference(s)</b>	Care	Assault	Care	Manage and Care	Assault and Care	Journey and Care	All except Coordinate
<b>Gameplay mechanic LIKES</b>	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
<b>Gameplay mechanic DISLIKES</b>	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 adapted from Vahlo, Kaakinen, Holm, & Koponen. "Digital Game Dynamics Preferences and Player Types", *Journal of Computer-Mediated Communication*. 2017

# 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

*“Be a yardstick of quality. Some people aren't used to an environment where excellence is expected.”*

*– Steve Jobs*

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