LIQUID&GRIT

Casino Report

Competitive Research and Actionable Product Recommendations
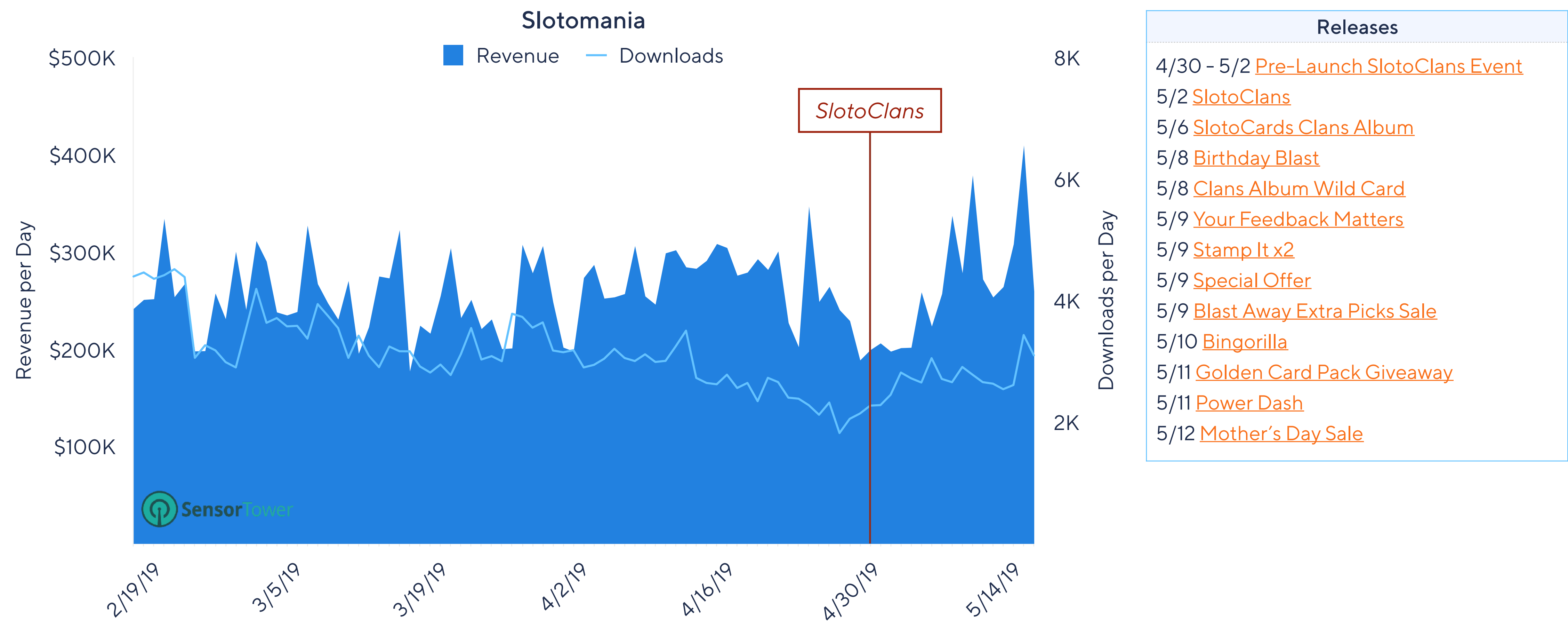
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MAY

2019

REVENUE DRIVERS

CLUB FEATURES: CLANS

SlotoClans in Slotomania

IMPACT ANALYSIS

Following the release of *SlotoClans* in Slotomania, revenue was down –14% WoW. Revenue increased +32% WoW after sales and events integrated with *SlotoClans* went live. Revenue continued to be elevated +20% 2Wo2W.

Slotomania

Revenue ▬ Downloads

Releases
4/30 – 5/2 Pre-Launch SlotoClans Event
5/2 SlotoClans
5/6 SlotoCards Clans Album
5/8 Birthday Blast
5/8 Clans Album Wild Card
5/9 Your Feedback Matters
5/9 Stamp It x2
5/9 Special Offer
5/9 Blast Away Extra Picks Sale
5/10 Bingorilla
5/11 Golden Card Pack Giveaway
5/11 Power Dash
5/12 Mother's Day Sale

*Headline and graph data is iOS U.S. only
2Wo2W = Two weeks over two weeks

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FEATURE TEARDOWN

A pre-launch event required players to unite together to unlock a *Starter Kit*. Once *SlotoClans* went live, players joined a *SlotoClan,* collectively completed challenges, and won chests and coins. *SlotoClans* is integrated into other elements of the app, including collections and missions.
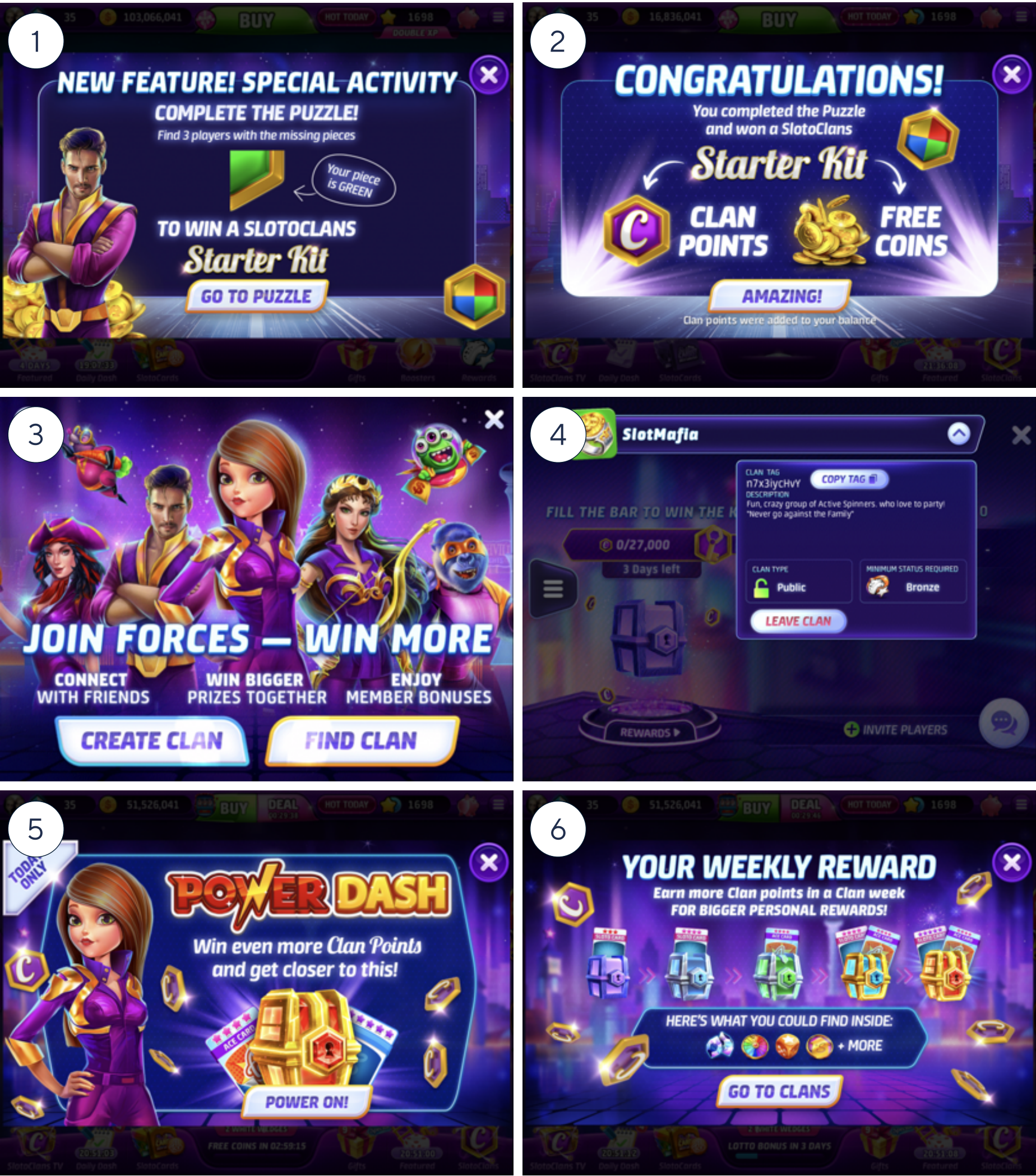
Pre-Launch Event Details
- Players received 1 of 4 colored pieces of a puzzle (1).
- Players were required to find 3 other players with the missing-colored pieces.
- Once the puzzle was completed, all 4 players received a *SlotoClans Starter Kit* (2).

Feature Details
- All players can join or create a *SlotoClan* (3).
- Players can share and search for *SlotoClans* using a unique *Tag* (4).
- Members earn *Clan Points* by spinning and completing *Daily Dash* challenges (5).
- *Clan Points* are used to collectively fill a meter, to earn a *Key,* to unlock a *Clan Chest*.
- Once the *Clan Chest* is opened, players can upgrade their personal *Chest* with more play (6).
- All members get a bonus when one member completes a *SlotoCard Set* or wins a qualified jackpot.

Post-Launch Details
- SlotoCards Clans Album was released with more ways for *SlotoClan* members to win *Cards*.
- SlotoQuest went live that awards *Star AceCards* for the *Clan Album*.
- Birthday Blast event that awarded *Cards* for the *Clan Album* was released.
- Clans Album Wild Card event went live that gave players a *Wild Card* for the *Clan Album*.
- Power Dash event was released that had players complete *Daily Dashes* to earn *Clan Points*.

Feature Database

Find more images and videos in the SlotoClans Library

DESIGN INSIGHTS

Use existing features and events to ensure strong initial Club-engagement. Test pre-launch marketing for potential viral boosts. Club Features focused on collaboration are producing results in both Casino and Puzzle.
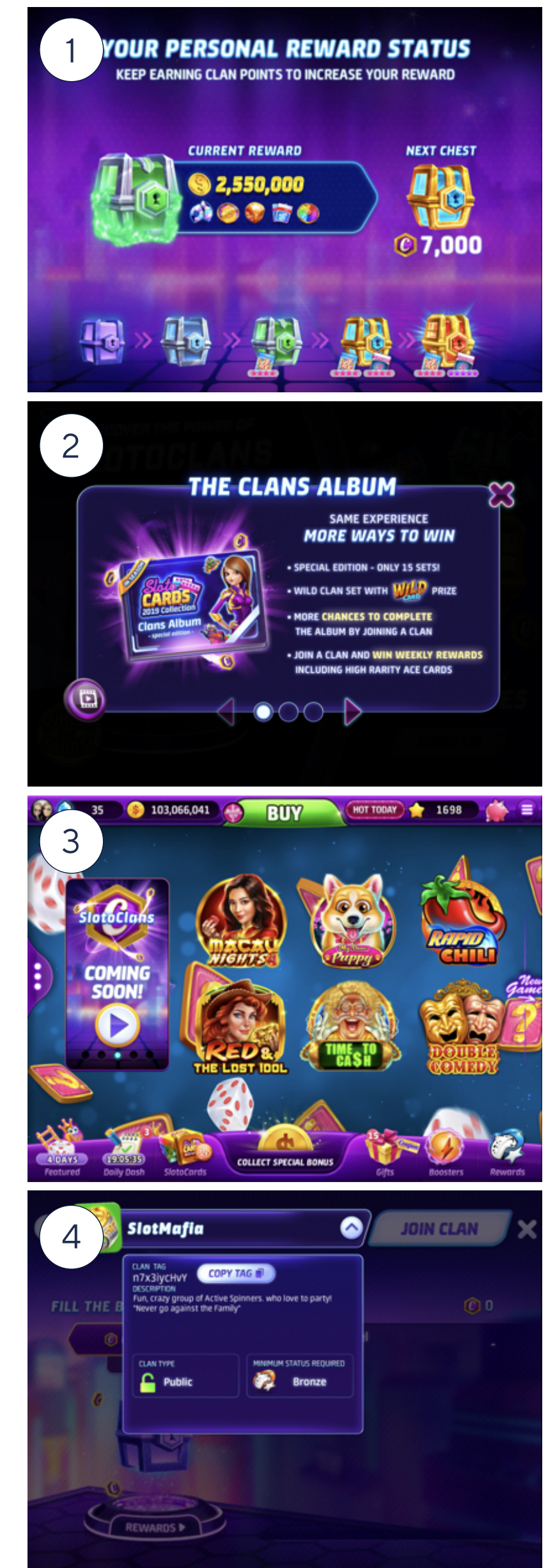
Product Recommendations

- **For group-based features, add logic that awards strong individuals.** Once the group award is achieved in *SlotoClans,* individual players may upgrade their personal winnings … incentivizing stronger play from heavily-engaged players (1).
- **Utilize current features, events, and sales to drive new feature adoption.** In Slotomania, revenue increased after the launch of *SlotoClans-integrated* events and features. *SlotoClubs* (different from *SlotoClans*) are also integrated into sale discounts (2).
- **Pre-launch marketing is an area of opportunity for product teams.** Similar to blockbuster movies, games should invest considerably in pre-launch marketing to increase feature adoption, pre-launch retention, and installs (3).
- **Use *Tags* and personalized URLs to generate virality.** In *SlotoClans, Tags* let players post information online so other players can easily find a specific *Clan* (4).

Target Player Persona

- **Slotomania targets *Daydreamer Denise,* as she prefers challenges, collections, and quests.** She does not tend to spend a lot of money … but uses in-game, progression-based features as an escape from the pressures of everyday life. See the L&G Slots Personas Report for more information (separate subscription required).
- **In 2019, Slotomania has invested in the following Event categories:** Mini-Games (28% of total new events released), Challenges (16%), Quests (16%), Purchases (16%) and Collections (8%). The investment in Challenges, Quests, and Collections supports the focus on *Daydreamer Denise* players. Use the Data tool in the Feature Database for more investment analysis.

Puzzle Genre Reference

- **Revenue was up +20% WoW after Club Features (centered on sharing lives) was released in both Homescapes and Lost Island Blast Adventure.** For more images and videos of these features, see Teams in Homescapes and Clubs in Lost Island Blast Adventure. For an analysis, go to the 05 2019 Puzzle Report.
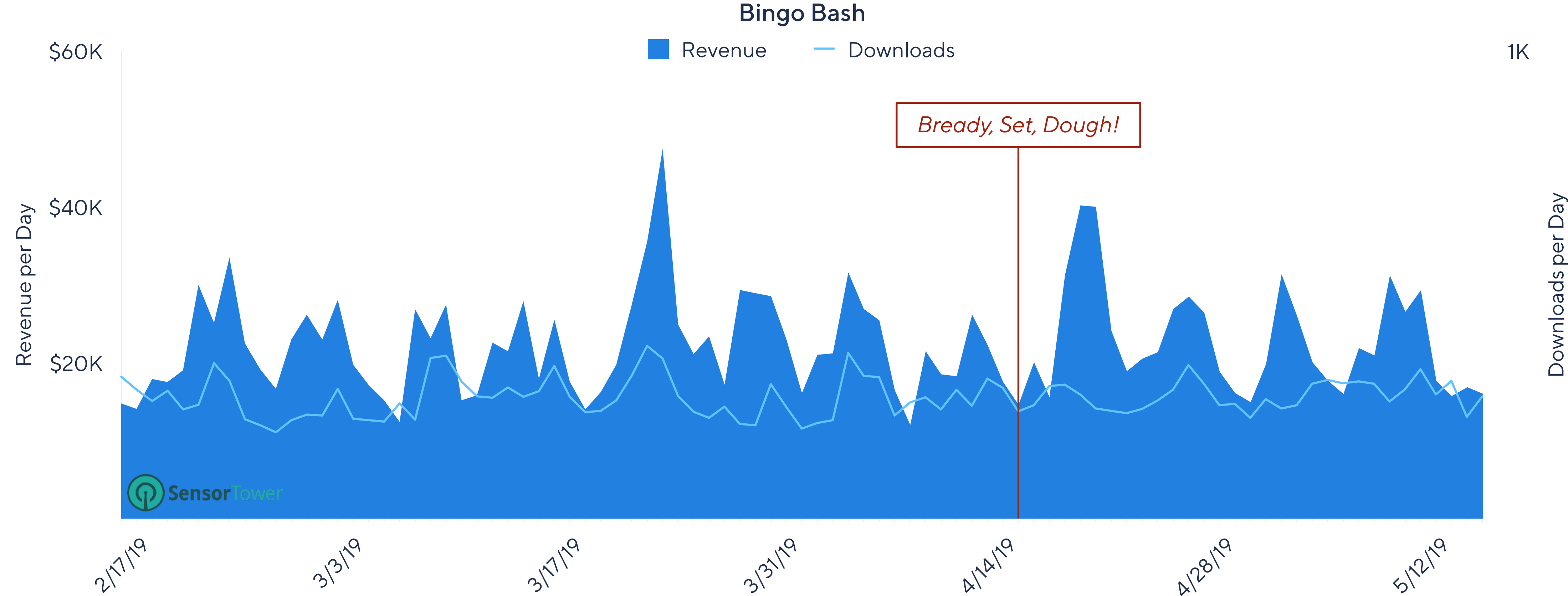
NEW INNOVATIONS

EXPANSION FEATURES: STORES

Bready, Set, Dough! in Bingo Bash

IMPACT ANALYSIS

In Bingo Bash, revenue increased +32% WoW after the release of an Easter weekend sale, unlimited boosts event, and bingo room mini-game called *Bready, Set, Dough!*

Releases

4/16 Bready, Set, Dough!
4/19 – 4/21 Unlimited Boosts
4/20 The Great Bake Off
4/21 Deal of the Month

Bingo Bash

■ Revenue — Downloads

$60K

1K

$40K

$20K

Bready, Set, Dough!

Revenue per Day

Downloads per Day

SensorTower

2/17/19   3/3/19   3/17/19   3/31/19   4/14/19   4/28/19   5/12/19

*Headline and graph data is iOS U.S. only
WoW = week over week
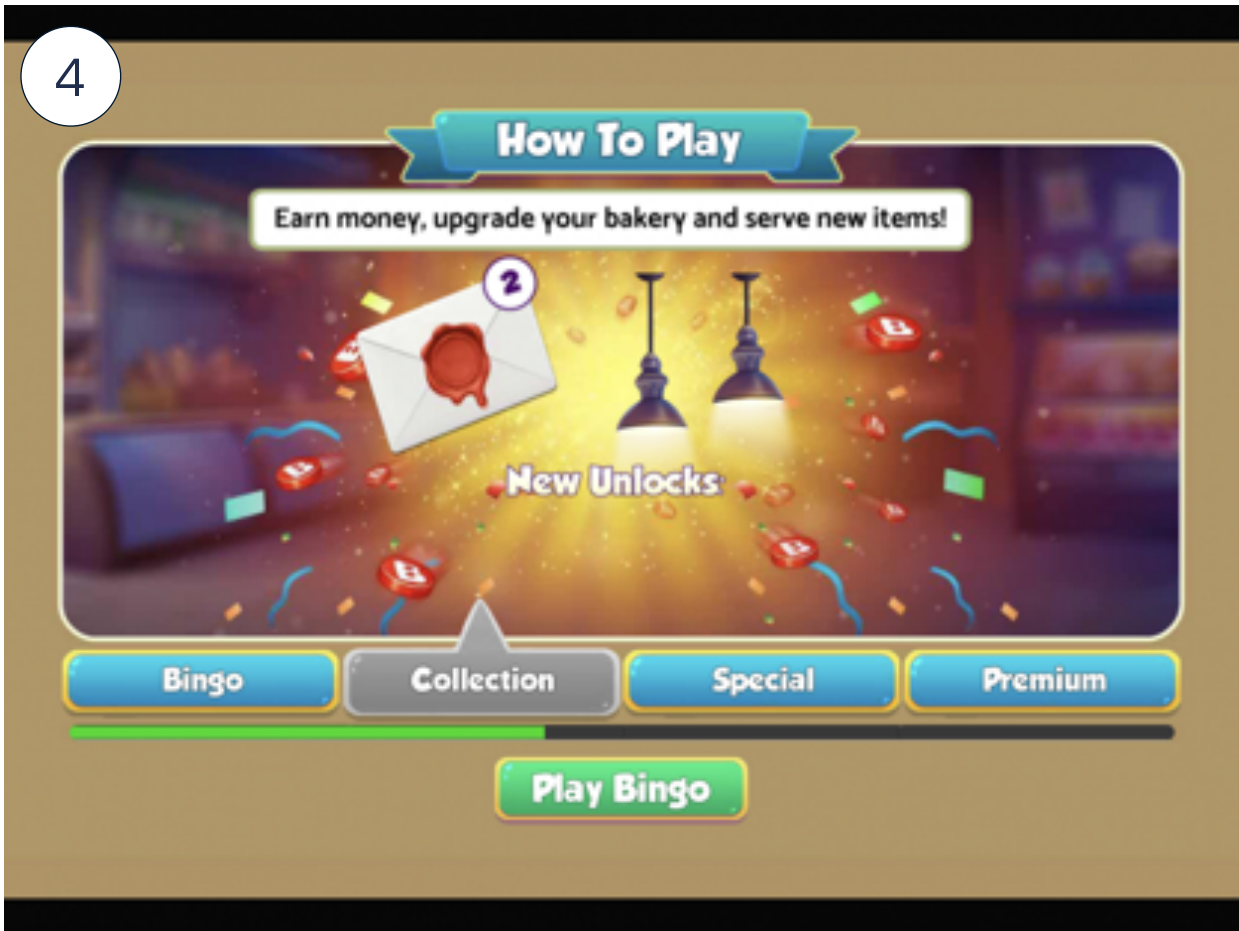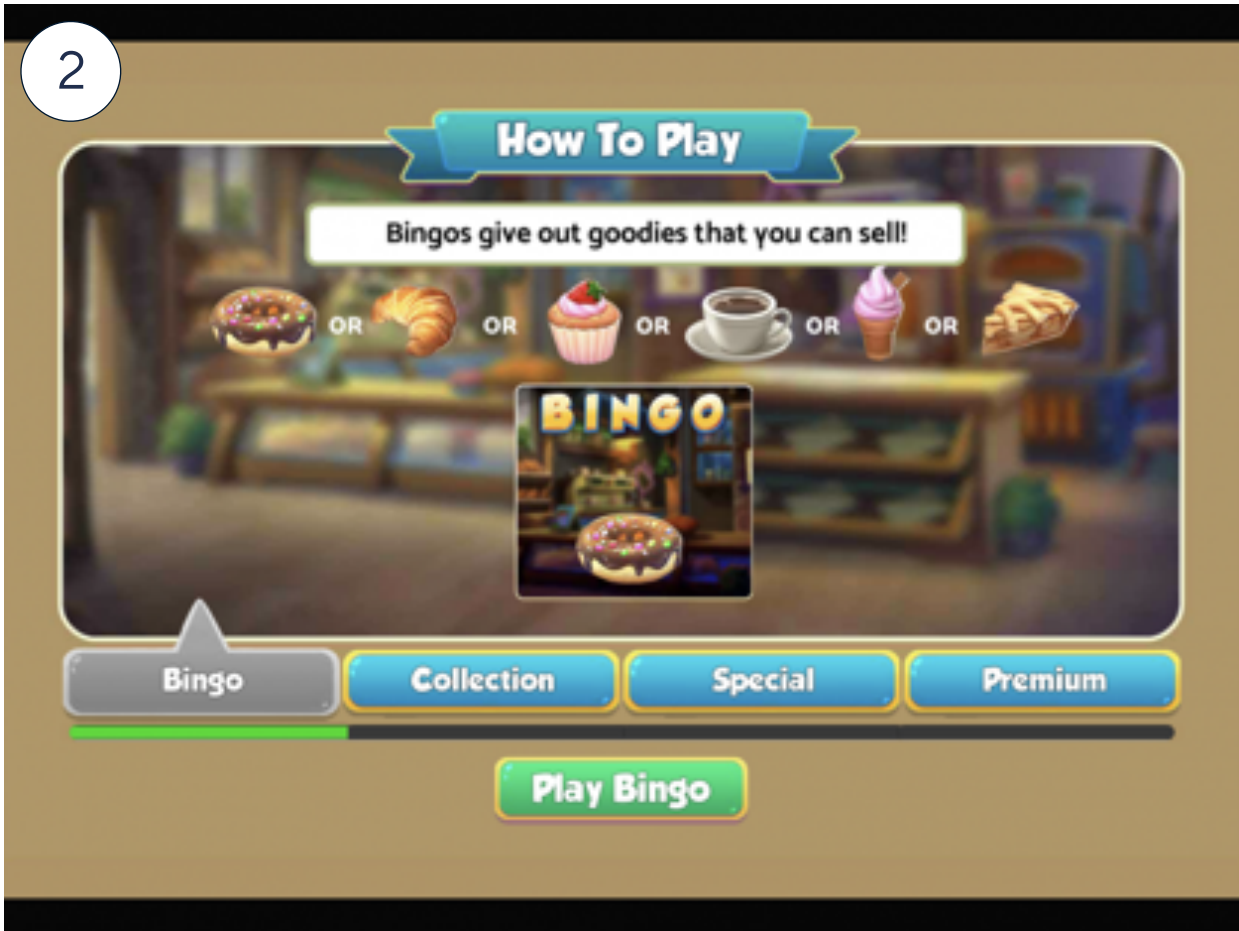
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FEATURE TEARDOWN

Players daub and hit bingos to bring *Customers* to a *Bakery*. Once *Customers* arrive, players sell *Goods* to fill a meter and upgrade their *Bakery*, win prizes, and unlock new *Goods*.

Feature Details

- *Customers* are randomly placed on bingo cards.
- Players daub to clear a path for *Customers* to reach the *Bakery* at the center of the card (1).
- Daubing red cells awards *Puzzle Pieces,* and 10 *Pieces* awards *Goods* to sell.
- Hitting a bingo brings all the *Customers* to the *Bakery,* and awards *Goods* to sell to *Customers* (2).
- More valuable bingo cards improves the potential *Goods* and coins awarded.
- In the *Bakery, Customers* have different orders and costs (3).
- Each *Good* sold adds to the meter (4).
- Once the meter is filled, the *Bakery* is upgraded and new *Goods* are available to sell.

Feature Database
See more images and videos in the Bready, Set, Dough! Library or watch this video in the Feature Database

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DESIGN INSIGHTS

This Store mechanic extracts value from the success of cooking genre apps, like Cooking Craze. Consider adding Idle Games-like mechanics that award players in the background, so as not to compete *directly* with cooking genre apps.

Product Recommendations

- Use mini-games to reward players without requiring much engagement. This will allow players to focus on the core game mechanic (bingo), while still generating value from the mini-game mechanic (*Bakery*). See this blog post on Idle Games from Kongregate for more information on how Idle Games work.

- Consider adding *Rockets* powerup purchases to drive transactions. *Rockets* powerup packages at $2.99 and $0.99 are the 2nd and 3rd most-purchased IAP packages in Bingo Bash (as of 4/1/19). *Rockets* daub two random numbers per card (1 & 2).

Target Player Persona

- *Sensation Serena* is the target player persona ... and the most likely to play bingo (in addition to slots). *Sensation Serena* is the smallest group, but spends the most money. She is motivated to trigger Arousal, and then Profit emotions. See the L&G Slots Personas Report for more information.

- *Sensation Serena* enjoys lotteries and piggy banks ... and she has the highest overall preferences towards features. Features appeal to her desire for Profit ... and core game play (like bingo and slots) appeal to her desire for Arousal.

Puzzle Genre Reference

- Consider adding a hidden object mechanic to a sales dialogue to drive conversion. Review the 05 2019 Puzzle Report for details of Seeker's Notes implementation.

- To increase engagement, make the mini-game free to start. Review the freemium system in the 04 2019 Casino Report and Bake Sale event in the 12 2018 Puzzle Report.
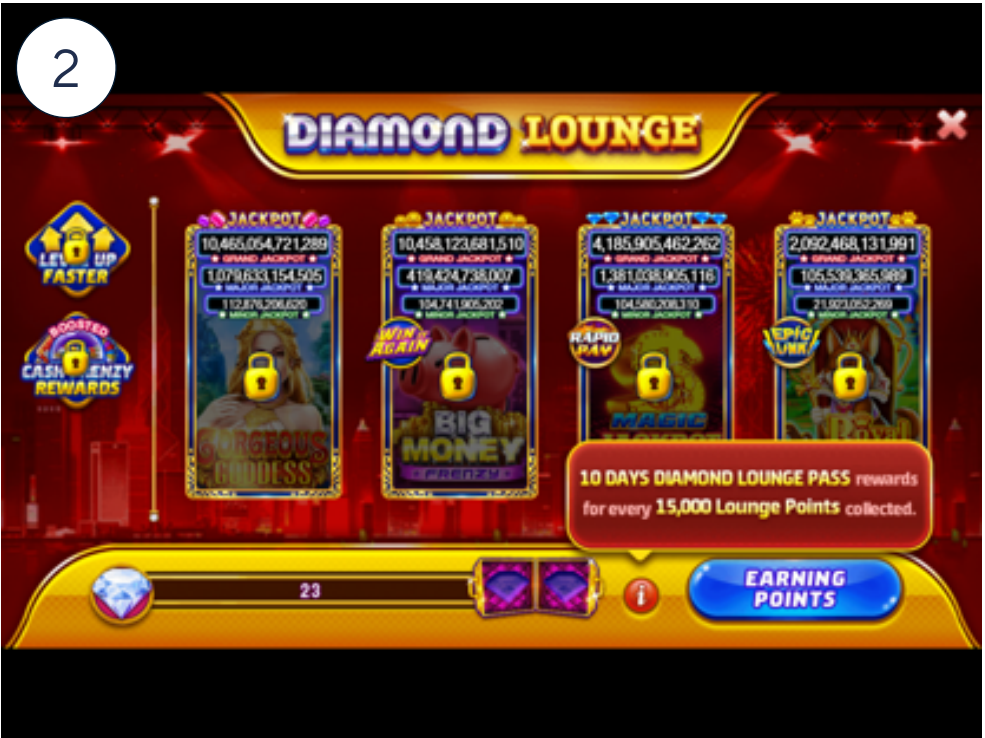
BREAKOUT APPS

CASH FRENZY BY SECRETSAUCE

Cash Frenzy was hard launched 8/16/18, and is currently generating close to $40K per day in U.S. iOS revenue. This level-based progression app includes both an *exclusive* and *available-to-all* collection feature. The design and features are highly influenced by Slotomania and Cashman Casino.

Product Highlights
- New users receive a Starter Week streak bonus similar to Jackpot Party's Welcome Back Week (1).
- The Diamond Lounge, which is similar to Slotomania's SlotoClub, is an exclusive content area.
- Players receive a 10 day pass to the *Diamond Lounge* after collecting 15K *Lounge Points* (2).
- There is an exclusive collection feature in the *Diamond Lounge* called Build Your Dreams (3).
- There is also an available-to-all collection feature called Amazing Stamps.
- A Wheel of Cash bonus includes a jackpot and multiplier that increases during play, similar to Cashman Casino's Daily Reward.
- Megaball Bonus is awarded every 3rd consecutive day of play, which is similar to Slotomania's Lotto Bonus.
- On certain dialogues, rewards are stated in coins and the dollar value (4).

Additional Features
- New User Flow
- Misc. Currency
- Misc. Features
- VIP
- Bonuses
- Daily Mission
- Money Bank
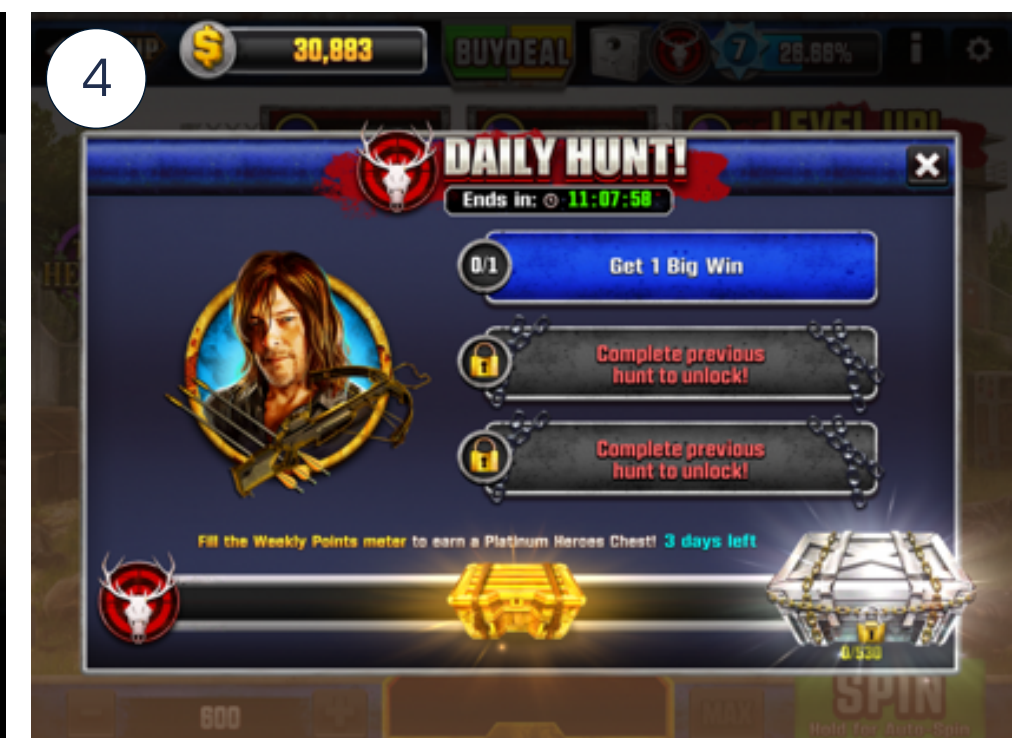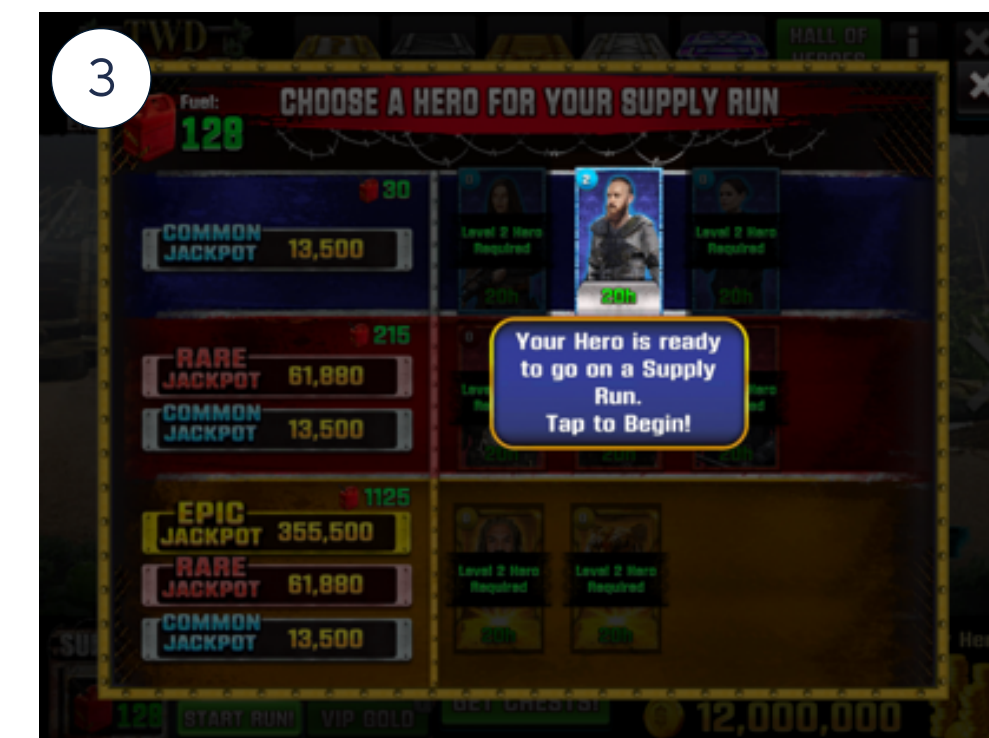- Boosters

THE WALKING DEAD CASINO SLOTS BY FTX GAMES

The Walking Dead Casino Slots was hard launched 12/6/18, and is currently generating $2.5K per day in U.S. iOS revenue. Players collect XP to progress and unlock content. There is a collection mechanic that is well-integrated with the IP, includes a timer mechanic, and is similar to *HoF Legends*.

Product Highlights
- Players progress by collecting XP to unlock new content (1).
- The collection feature, TWD Heroes, is similar to HoF Legends.
- In *TWD Heroes,* players collect and level up 8 characters for rewards (2).
  - There are 4 chest types containing character XP and *Fuel*.
  - Chests are earned by spinning, making purchases, leveling up, completing quests, and collecting a bonus chest in a retention bonus (available every 18 hours).
  - *Fuel* is used to send characters (L2 or above) on *Supply* runs, which awards a spin of a wheel (see this video).
  - Each *Supply* run is timed. The timer is reduced as characters level up (3)
- There is a daily missions feature called Daily Hunt, with a weekly fill meter (similar to Daily Dash in Slotomania).

Additional Features
- New User Flow
- Misc. Currency
- Misc. Features
- Rescue the Survivors
- Tournaments
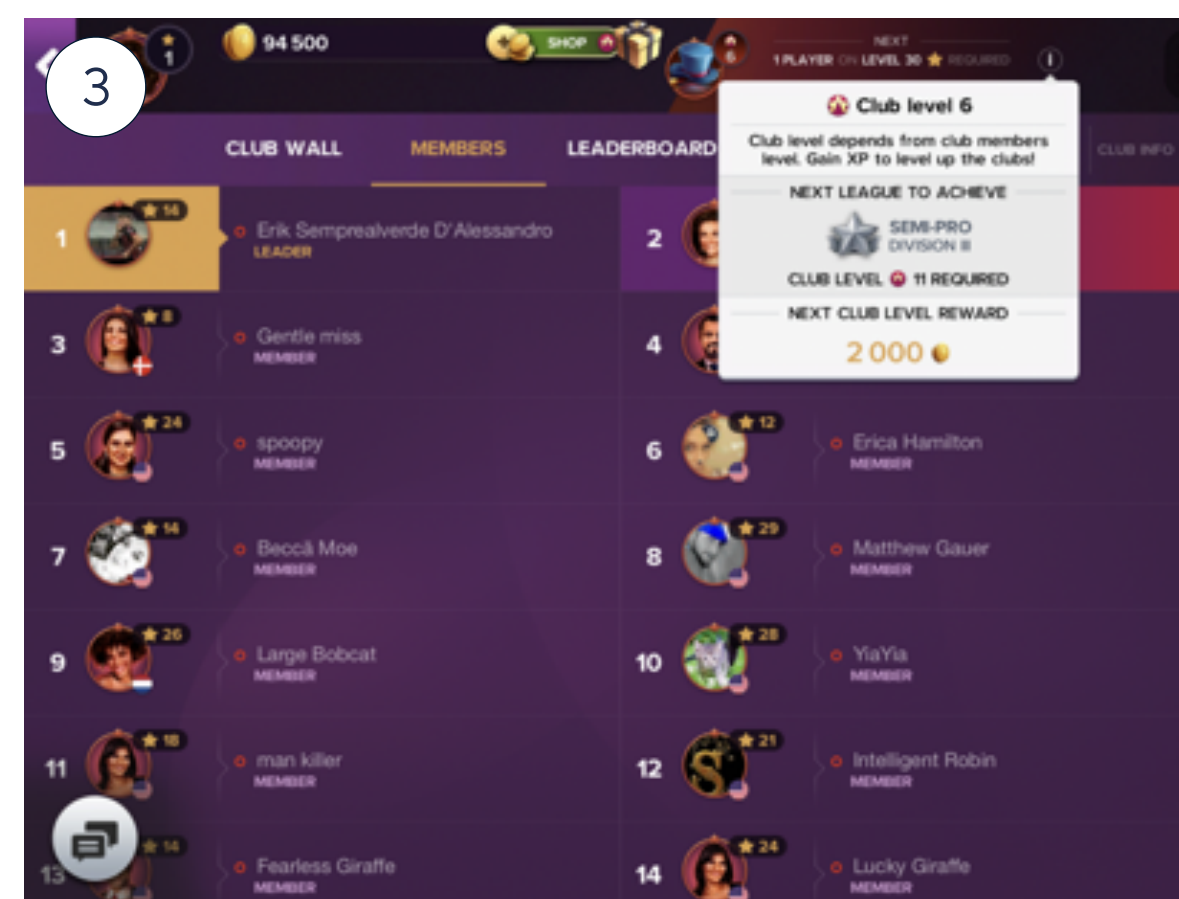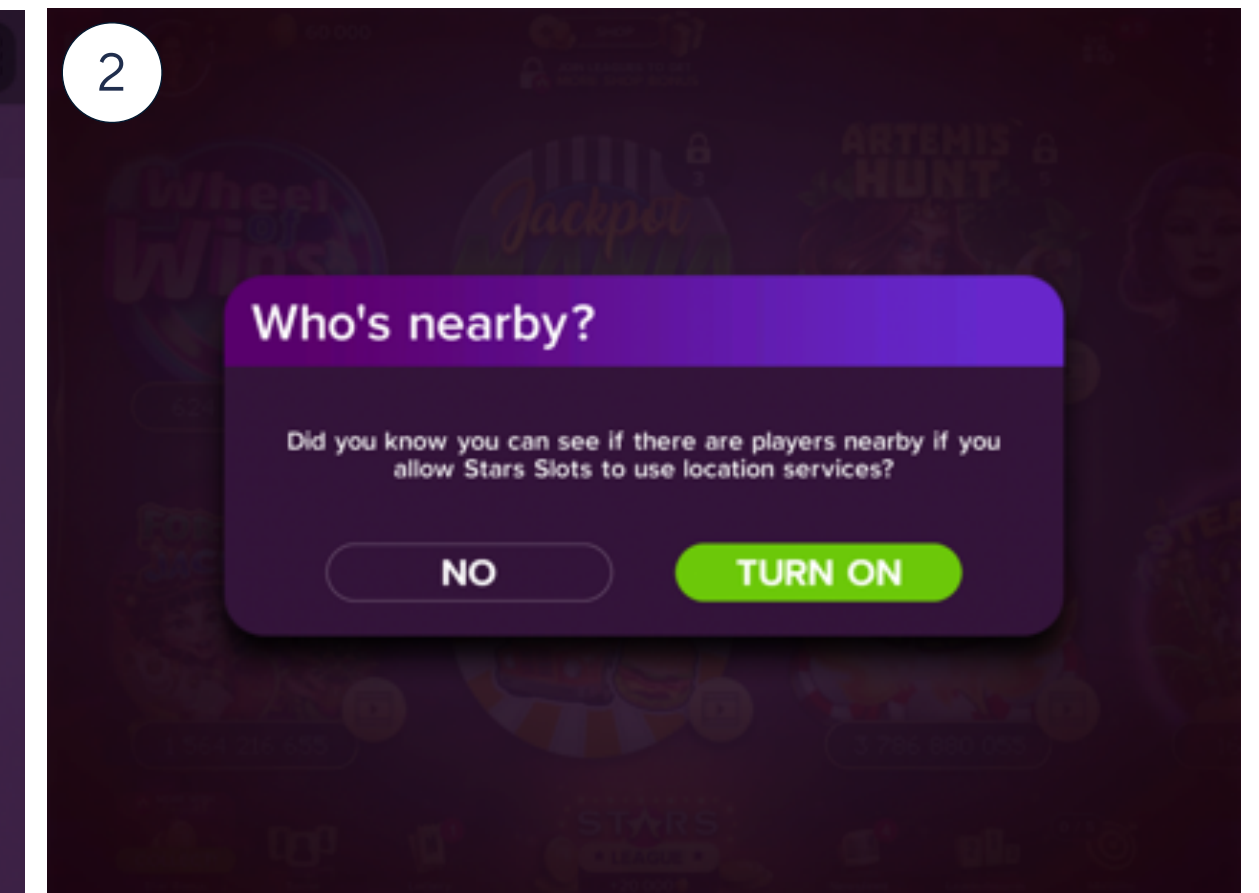- VIP
- RPG Hunt
- Safe

STARS SLOTS CASINO BY HUUUGE GLOBAL

Stars Slots Casino was hard launched 1/3/19, and is averaging $100 per day in U.S. iOS revenue. The app is similar to Huuuge Casino … but with location-based services and adjustments to Clubs.

Product Highlights

- The New User Flow presents social elements to players (1).
- Players can turn on location-based services to see players nearby (see this video and image 2).
- Stars League rankings are based on Club members XP levels … a twist on standard club systems (3).
- An additional multiplier on the Daily Bonus is only unlocked if the player has joined a Club.
- The *Free Shop Coins* is based on Club *Level* and *League*.
- Each machine displays a preview video (4).
- The Lottery allows players to play all tickets at once (see this video).

Additional Features

- Misc. Currency
- Misc. Features
- Daily Missions
- Leaderboards

MARKET WATCH

4/15/19 – 5/14/19

NOTABLE RELEASES I

App	Full Library	Key Moment	Description
Slotomania	Frankenstein Rising Tournament	Tournament Time!	• Exclusive machine and tournament event. • When the spin counter ends, qualified players are awarded free spins based on their ranking (1).
WSOP	Daily Blitz	Day One Challenge	• Daily mini-game for players to pick the best poker hand before time runs out. • Players are given an initial 15 second timer, with an additional 15 seconds added each consecutive day of logging in (2).
	Face Off	Express Leaderboard	• New fast-paced, two player tournaments in *Express* or *Turbo* rooms.
DoubleDown Casino	MegaBucks Room	MegaBucks Lobby	• Exclusive machines and area with a *MegaBucks Jackpot*. • Purchasing a *Booster* increases the jackpot amount (3).

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NOTABLE RELEASES II

App	Full Library	Key Moment	Description
Caesars Slots	The Legend of the 4 Kingdoms	Quest Tutorial	• Players unlock new collections. • Duplicate items must be converted to complete the secondary collection (reskin of Caesars Spectacular Show).
Big Fish Casino	Treasures	Level One, Set One Rewards	• Players spin in any machine to land 3 chest symbols to collect tokens towards level goals (1).
Heart of Vegas	All Stars	How to Become an All Star	• Players spin in slots to increase ranking in a tiered leaderboard competition (2).
Scatter Slots	Scatter Wars II	Liberating Land	• Players collect character cards to build their *Army* and liberate *Lands*. • Players can upgrade their characters with *Gems*. • Each of the 10 levels has a map of *Lands* that need to be freed (3).

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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

L&G SLOTS PERSONAS

A survey of 1,299 participants from the U.K. and U.S. were recruited to respond. The data formed patterns of game choices, slots preferences, and playing habits ... producing five distinct personas.

	Demographics*				
	Fame Frank	**Money Mike**	**Daydreamer Denise**	**Gambler Gail**	**Sensation Serena**
Size	21%	22%	27%	19%	12%
Women	50%	51%	66%	60%	55%
Age	32 mean / 30 median	34 mean / 32 median	35 mean / 34 median	35 mean / 33 median	35 mean / 32 median
Education*	3.5	3.3	3.5	3.2	3.3
Money Spent	4.2	4.9	3.5	5.4	5.8
Play Time	5.0	4.5	5.0	4.9	6.5

* The Education, Money Spent, and Play Time numbers are representative of the strength of each player persona.

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"Going to bed at night saying we've done something wonderful, that's what matters to me."

– Steve Jobs

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