LIQUID&GRIT

Casino Report

Competitive Research and Actionable Product Recommendations

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SEPTEMBER

2019

REVENUE DRIVERS

UNLOCKING BOOSTS POST-PURCHASE

Leprechaun in *Slotomania*

REVENUE ANALYSIS

After the launch of Leprechaun in *Slotomania,* revenue was +9.4% WoW and +14.9% 2Wo2W. Downloads were +7.9% and +16.9% during those time periods. After the release of Gladiator Sale, revenue was +14.8% WoW.

Releases

7/12–present | SlotoCards: The Majestic Album collection feature
8/12–8/15 | Majestic Blast mini-game event
8/15–present | Leprechaun purchase event
8/16 | Spartacus & Crixus machine
8/18 | Gladiator Sale purchase event
8/19 | $99.99 Jumbo Package +2 to #7
8/19–8/22 | SlotoCards Bingo mini-game event

Slotomania

Revenue — Downloads
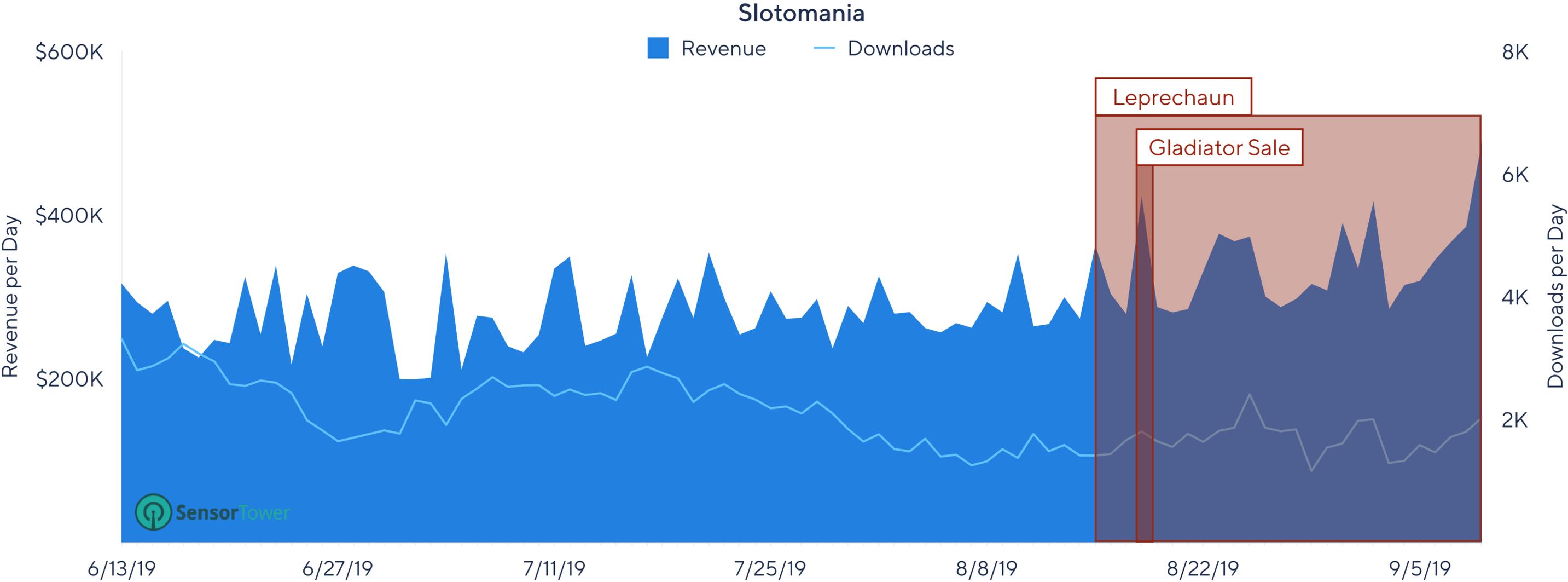
Graph data is iOS U.S. only
xWoxW = X weeks over X weeks

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FEATURE TEARDOWN

After making a Coin Store purchase, players can win an additional percentage of their purchase by filling a bonus meter within a time limit.

Leprechaun Details
- Any Coin Store purchase activates a meter with a countdown timer (1, 2, and video).
- Hitting a winning spin in any machine fills the meter (3).
- Completing the meter, before time expires, awards a percentage of the coin purchase (4).
- The bonus coin award scales with the size of the purchase (5).

Gladiator Sale Details
- The Gladiator Sale adds 70% more coins to all coin packages (6).

Quickly find more information in the Feature Database
- See the Leprechaun Library for more images and check out the purchase flow and in-machine meter fill videos.

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ROADMAP DATA

Slotomania invests more in mini-game events and less in competition events compared to the 15 highest-grossing Casino apps.
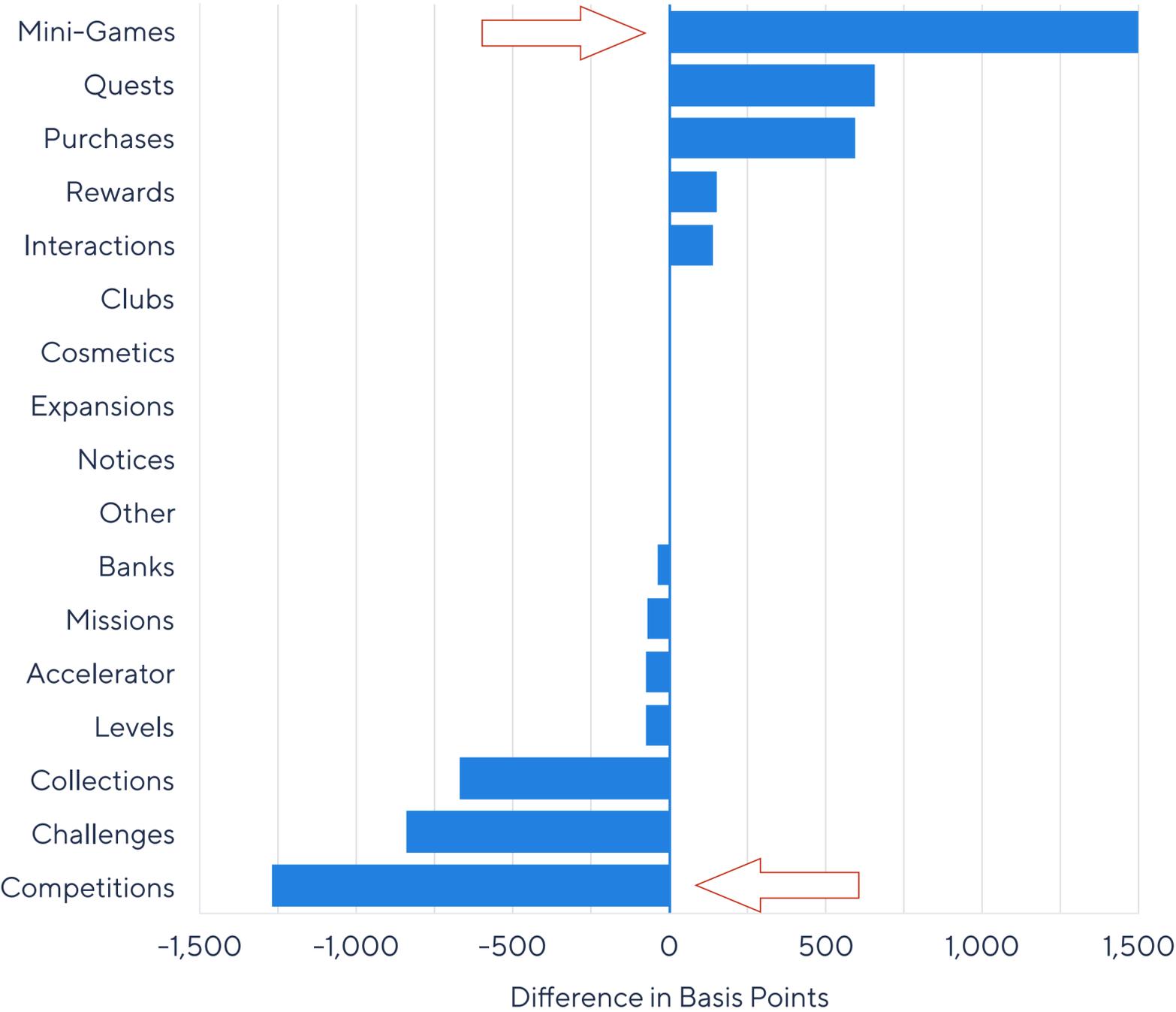
Roadmap Details

- See the Appendix for descriptions of all Liquid and Grit's mechanic categories.

Analyze competitor's roadmap data

- Download release insights by app using the Data Tool.

Event Investments: Slotomania vs. Top 15 Casino Apps

Difference in Basis Points

PRODUCT INSIGHTS

Use post-purchase sweeteners to sink players' wallets, make the purchase feel more satisfying, and drive another transaction.

Product Recommendation

- **Add multiple milestones to bonus meters to increase feature adoption and coins sunk.** In *Raid: Shadow Legends'* Excruciator Champion Training Event, players receive rewards at 18 milestones (1). This design increases feature adoption by making bonuses attainable for more players. Total spend is also increased by giving difficult goals to heavily-engaged players.

- **Make the post-purchase flow clear and visually rewarding to increase transactions per player.** Following a purchase in *Slotomania*, players see a dialogue highlighting the awarded coins, boost, status points, club points, and stamp (2). Then, an animation shows coins floating into their wallet, a card being stamped, a pack of SlotoCards opening, and finally, the Leprechaun timer starting (video).

- **Upsell players with a post-purchase coin package multiplier to increase transactions per day.** *Slotomania* offers players a Lucky Spin that can multiply their purchase by up to 20x. Lucky Spin IAP packages for $1.99 and $4.99 are the eighth and ninth most-transacted packages in *Slotomania* as of 8/26/19 (video).

- **Test a "Refresh" mechanic that changes the packages, discounts, and add-ons to increase conversion.** In *Rise of Kingdoms'* Bankrupt the Boutique, players can refresh the store five times. The first time is free and the following four cost gems. Refreshing the store changes the items and discounts (3 and video).
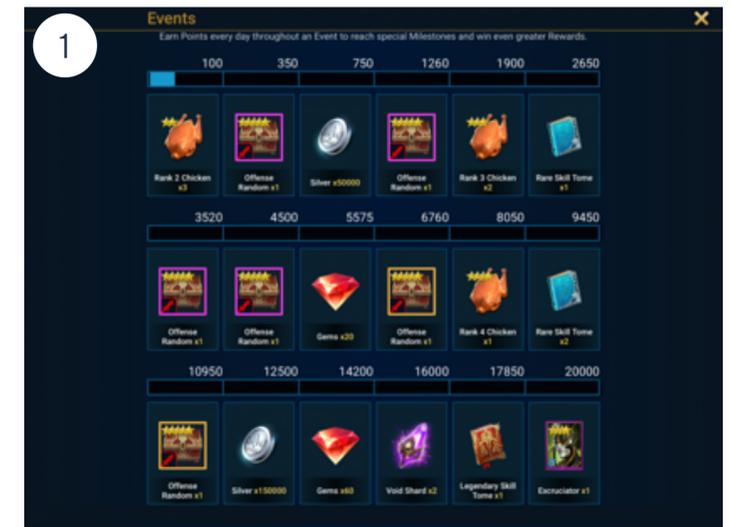
Research Insights

- **Increase package prices based on days since download or a related metric.** According to an Amazon study of 50 top-grossing games, players who have owned an app for at least 30 days make purchases that are 60% more expensive than purchases made by players on day one. (Source: When Do Players Purchase in Mobile Games?, 2014)

| Easily read more insights |
|---|
| • Review previously released revenue drivers in the Wiki Tool. |
| • Find all the information on specific mechanics, like collection features. |

COLLECTIONS WITH VIP LEVELS

Euro Bites in *Bingo Blitz*

REVENUE ANALYSIS

Bingo Blitz's revenue spiked +23.3% WoW and downloads were +6.8% WoW after the launch of Euro Bites.

Bingo Blitz
■ Revenue — Downloads

Euro Bites

SensorTower
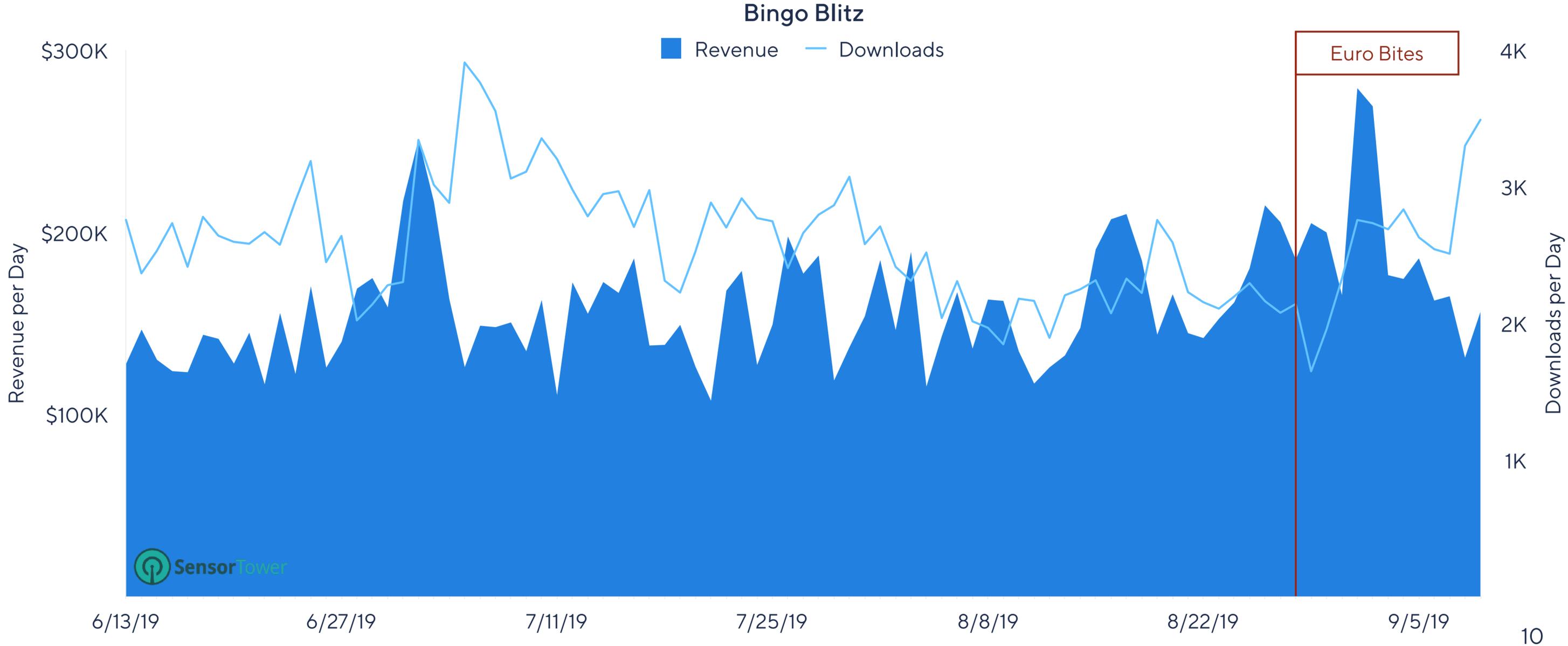
FEATURE TEARDOWN

Players have multiple ways to collect ingredients to make dishes. Completed dishes advance players along a map and increase players' ranks to unlock additional benefits.

Collecting Ingredients Details

- Players win bingos, make purchases, pass levels, and send friend requests to collect ingredients.
  - Players can receive up to 10 ingredients from friends every 24 hours.

Quest Ingredients Details

- Players use ingredients to complete dishes and advance along a map (1).
- Making all the location's dishes unlocks a reward and progresses players to the next location (2).
- As players progress, IAP bundles include more ingredients and rarer ingredients (3).
- Hitting a bingo with boosted bingo cards awards rarer ingredients (4).
- Completing all the map locations awards a grand prize and a badge.

Rewards Progression Details

- Players earn chef points for all completed dishes and locations.
- Collecting chef points unlocks new chef ranks (5).
- Each chef rank includes benefits, like increased daily ingredient send limits and bonuses (6).

Quickly find more images and videos

- See the Euro Bites Library for more images and and check out the NUX for Euro Bites feature video.

ROADMAP DATA

Mini-game events are heavily emphasized by both *Bingo Blitz* and *Slotomania*. Unlike *Slotomania,* however, *Bingo Blitz* invests heavily in competition events.
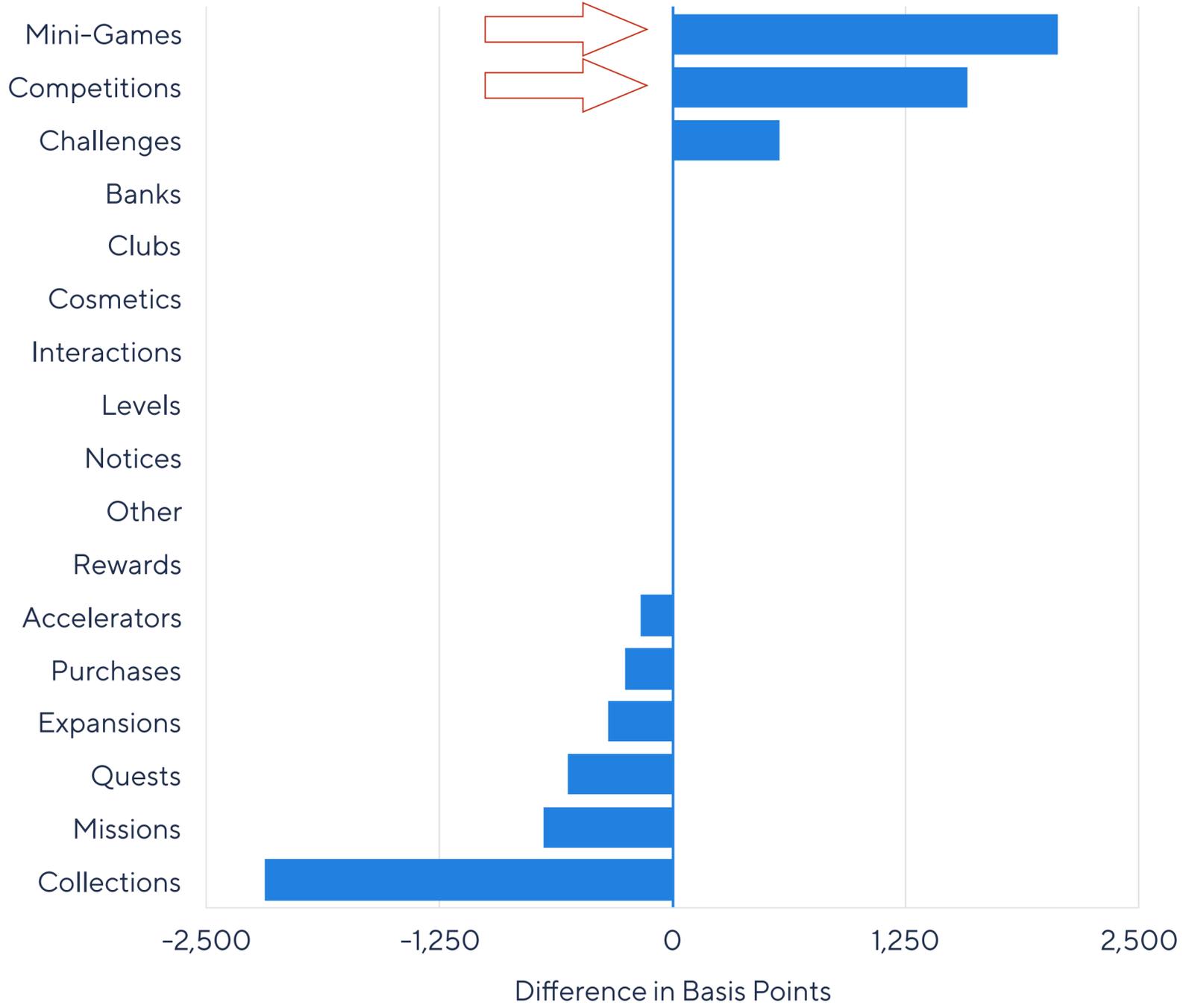
Roadmap Details
- Competition events in *Bingo Blitz* include Summer Splash Tournament, Moxie's Tournament, and Disco Tournament.
- See the Appendix for descriptions of all of Liquid and Grit's mechanic categories.
- Download a .csv file using the Data Tool to see *Bingo Blitz*'s event and feature investments.

Analyze competitor's roadmap data
- Download release insights by app using the Data Tool.

Event Investments: Bingo Blitz vs. Top 8 Bingo Apps

Difference in Basis Points

(Categories from top to bottom: Mini-Games, Competitions, Challenges, Banks, Clubs, Cosmetics, Interactions, Levels, Notices, Other, Rewards, Accelerators, Purchases, Expansions, Quests, Missions, Collections)

(Axis: -2,500, -1,250, 0, 1,250, 2,500)

PRODUCT INSIGHTS

Add persistent, unlockable reward tiers to features with gaps between content releases to reduce churn.

Product Recommendations

- Cooking mechanics are driving revenue in multiple apps and genres.
  - In addition to Euro Bites in *Bingo Blitz, Cash Frenzy*'s revenue was +1.6% WoW and +15.6% Wo2W after the release of Cooking Frenzy, a cooking-themed collection event (see the Collection Events Within Leagues Wiki page and image 1).
  - In *Matchington Mansion*, revenue was +1.2%, +10.2%, and +24.4% WoW after the three releases of the Brenden's Juice Bar event (see the Storefront Mechanics Wiki page).
- Use rank progressions that persist across content releases to reward players for returning to existing features. As players earn chef points in Euro Bites, they increase their rank for better rewards and faster progression. According to *Bingo Blitz*, a player's rank will carry over to the "next chef experience" (2).
- For complicated features, give players a choice between short and long tutorials to increase feature adoption. After a brief introduction, the Euro Bites tutorial gives players two options—"Got it!" and "Tell me more!"—to choose their preferred level of detail (3).

Research Insights

- Combine competition with social mechanics in group-based features. According to a research survey of 270K players, players who are attracted to group dynamics are interested in all different kinds of mechanics, including social and competitive. (Source: Competition Is Not The Opposite of Community)

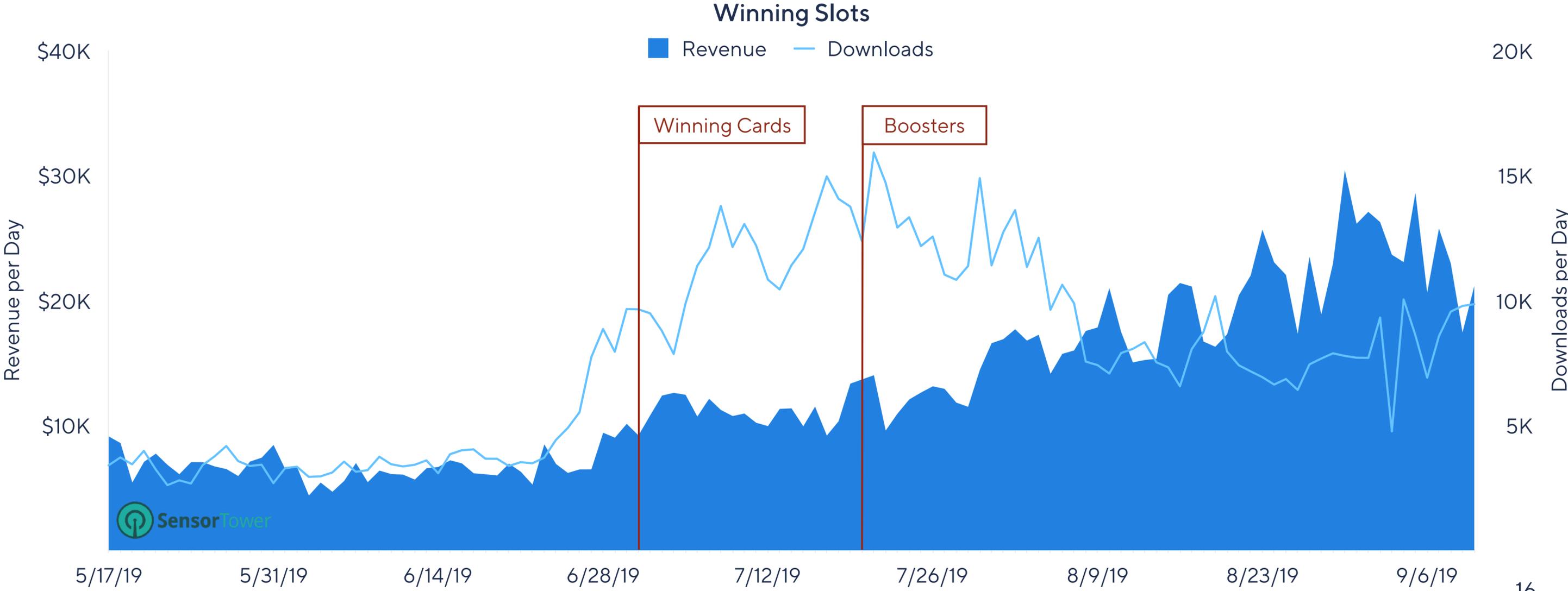| Easily read more insights |
| --- |
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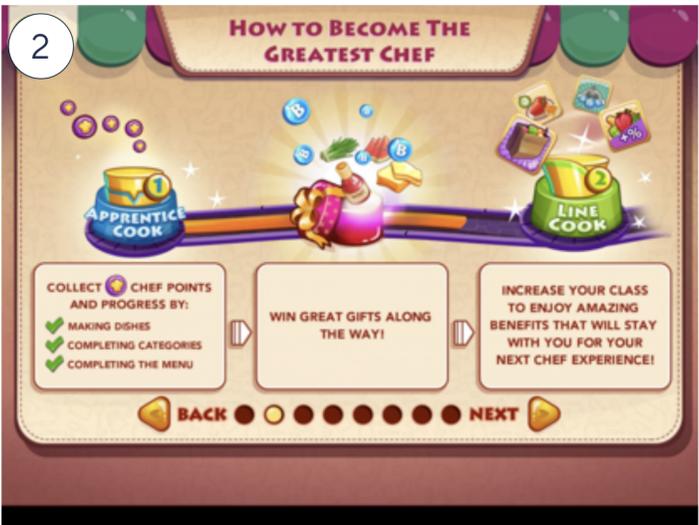
BREAKOUT APP

WINNING SLOTS BY TRIPLE SEVENS

REVENUE ANALYSIS

Hard-launched in February 2018, *Winning Slots'* revenue has climbed dramatically since June 2019. After the release of a collection feature called Winning Cards, revenue was +56.4% and downloads were +105.4% 2Wo2W.

Winning Slots

Revenue — Downloads

Revenue per Day

$40K
$30K
$20K
$10K

Winning Cards   Boosters

Downloads per Day

20K
15K
10K
5K

SensorTower

5/17/19   5/31/19   6/14/19   6/28/19   7/12/19   7/26/19   8/9/19   8/23/19   9/6/19

APP DECONSTRUCT

Winning Slots includes many features: banks, avatars, collections, and tournaments. In the collection feature Winning Cards, players complete sets to earn currency that can be exchanged for real-world items like computers and TVs.

App Details

- The Daily Bonus calendar includes a daily login bonus and a daily purchase deal (1 and 2).
- In Winning Cards, players spin machines or purchase card packages to collect cards.
  - Players collect duplicate cards to upgrade each card's level and earn rewards.
  - Upgrading all cards to level 5 awards the grand jackpot.
  - Players rank on a leaderboard based on their collection.
  - The the top five players receive Winning Coins.
- In the Prize Shop, players can purchase real-world items, like a MacBook Air or TV, with Winning Coins.
  - Winning Coins are obtained by inviting friends, completing missions, and finishing achievements (3).
  - Only players in the U.S., Australia, and Canada can purchase real-world items.
- The Private Vault saves 2% of players' bets in two vaults—one for the current day and the other for all past days (4).
  - Players unlock vaults with keys obtained through purchases, wins, and bonus wheel spins.
- Avatars are unlocked with level progression, coins, and purchases.

Launch Information
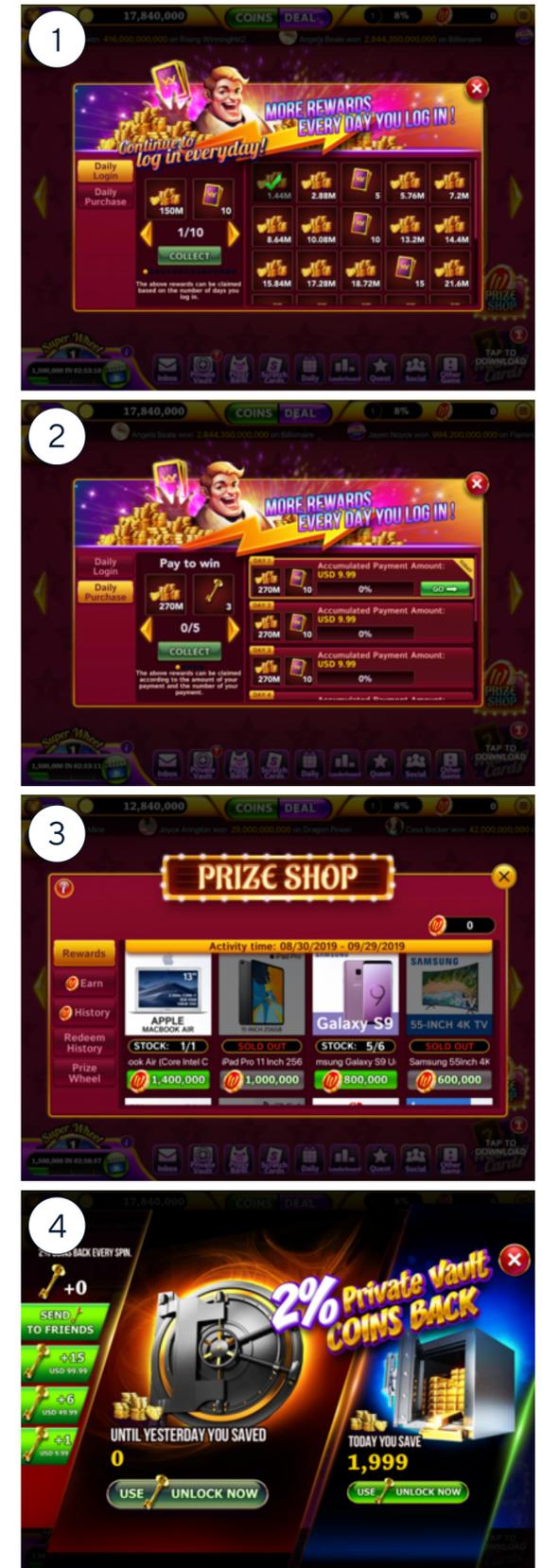
- Soft Launch: 1/22/18
  - Countries: Canada, Great Britain, Australia, and China
- Worldwide launch: 2/7/18

Quickly understand this breakout app

- Visit the Feature Database to see more features.

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MARKET WATCH

NOTABLE RELEASES I

| App	Library	Description
Bingo Blitz	Catching Rascal on the Beach	• Players collect paw icons from bingo cards to fill a meter. • Filling the meter activates a pick'em bonus (1). • Players can purchase additional pick'em picks from the store.
Jackpot Party	Lightning Leagues	• Players spin to collect lightning icons to compete in a league. • Each week, high-ranked players are promoted and low-ranked players are demoted (2).
Heart of Vegas	Collections	• Players spin or make purchases to earn items and postcards from specific cities. • Players collect all the items from a city to win a prize (3). • Completing all city collections awards a jackpot.

NOTABLE RELEASES II

App	Library	Description
Cash Frenzy	Archer Hero	• Players spin to fill a meter to collect arrows for a pick'em mini-game. • IAP packages award arrows and an increased arrow-collection rate. • Players spend arrows to activate bonus games (1).
DoubleU Casino	Enchanted Pot of Coins	• Players complete three missions to unlock an hourly coin bonus (2). • Players can repeat the missions to increase the coins awarded in the hourly bonus.
World Series of Poker	Summer Splash	• Players win three different tournaments to earn tournament–specific coins. • Each tournament involves a different type of poker. • Completing a tournament's coin collection rewards a ring and bonus chips. • Collecting all three tournament rings awards a bracelet and bonus chips (3).

NOTABLE RELEASES III

App	Library	Description
Slotomania	SlotoClans Trading	• Players can request 1 collectible card from friends every 24 hours (1). • Requests are shown in the club chat. • Players have 24 hours to fulfill each request.
Cash Frenzy	Cash Journey	• Players can randomly fill a dice meter on any spin. • Filling the meter awards two dice. • Players can purchase a boost to earn four dice for every filled meter. • Players roll the dice to move across a board to collect coins, boosts, and other items (2 and video).

Bingo Party	Summer Isles Trip	• Players daub bingo cards to fill a meter to spin a wheel.
		  • Players also complete daily tasks or make purchases to earn Odd-Even Controllers.
		• Players spin a wheel to advance on a board to collect prizes and items.
		  • Players can activate the Controller to remove odd or even numbers from the wheel (3).

	Odyssey Alien	• During the quest event, players can activate a mode to add a bonus chapter and rewards (4). • The bonus chapter includes a pick'em mini-game for tickets and prizes.
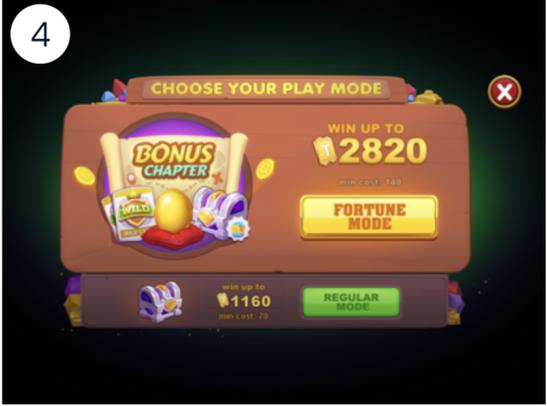
Quickly review all features and machines

• Filter the Library Tool by month and year to see all the new releases.

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APPENDIX

MECHANICS TAXONOMY

Family	Definitions
Accelerators	Increases the power, impact, or efficiency of play
Banks	Saves a % of spend that can be unlocked later
Bonuses	Free bonuses given to players often with time intervals
Challenges	Goal-oriented tasks for players to complete
Clubs	A group of players accomplishing goals or competing with other groups
Collections	A set of items players collect (often for a completion prize)
Competitions	Players competing against other players
Cosmetics	Improvements or updates to the game or a feature
Currencies	Changes to currencies, economies, stores, and items
Expansions	Additional rooms, worlds, play modes, VIP lounges, etc.
Flows	Specific flows, like the new user flow, ratings, and surveys

Family	Definitions
Interactions	Any social feature with direct or indirect interaction
Leaderboards	Stand-alone leaderboards
Levels	Anything to do with leveling
Mini-Games	Smaller, shorter games within the app (e.g., scratch cards)
Missions	A linear set of tasks that players must accomplish
Notices	Feature or product announcements
Other	Miscellaneous features and outliers
Profiles	A player's setup, profile, settings, and controls
Purchases	Anything to do with spending money on items in the app
Quests	Completing tasks to progress along a map or map-like mechanic
Rewards	Any reward players receive for engagement or spend (other than in the bonuses family)

UTILIZE L&G'S TOOLS

Uncover new Casino trends and understand competitor investments with Liquid and Grit's tools and capabilities. Our new Matrix Tool is now live!

DATA TOOL

1. Find new trends using the Data Tool's categorization.
2. Benchmark your app's output against competitors.
3. Export data into .csv to do more in-depth analysis.

WIKI TOOL

1. Reference all Liquid and Grit's insights.
2. Find and download previous reports.
3. Uncover revenue-driving features from other genres.

LIBRARY TOOL

1. Watch videos to understand animations and flows.
2. Download images to use as design templates and spec references.
3. Check out level-locked machines and features.

MATRIX TOOL

1. Benchmark the features in your app against specific competitors.
2. Find opportunities in the market for your app's growth.
3. Design a new app concept using features inspired by different games.

L&G SLOTS PERSONAS

1,299 participants from the U.K. and U.S. were surveyed about their mobile gaming use. The data produced five personas with distinct patterns of game choices, slots preferences, and playing habits.

	Demographics*				
	Fame Frank	**Money Mike**	**Daydreamer Denise**	**Gambler Gail**	**Sensation Serena**
Size	21%	22%	27%	19%	11%
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 represent the relative value of each category compared to other player personas.

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.

"A business absolutely devoted to service will have only one worry about profits. They will be embarrassingly large."

— Henry Ford

LiquidandGrit.com

Brett.Nowak@LiquidandGrit.com