



LIQUID&GRIT

CASINO REPORT

Competitive Research and Actionable Product Recommendations

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MARCH

2020

CHINESE APP TEARDOWN

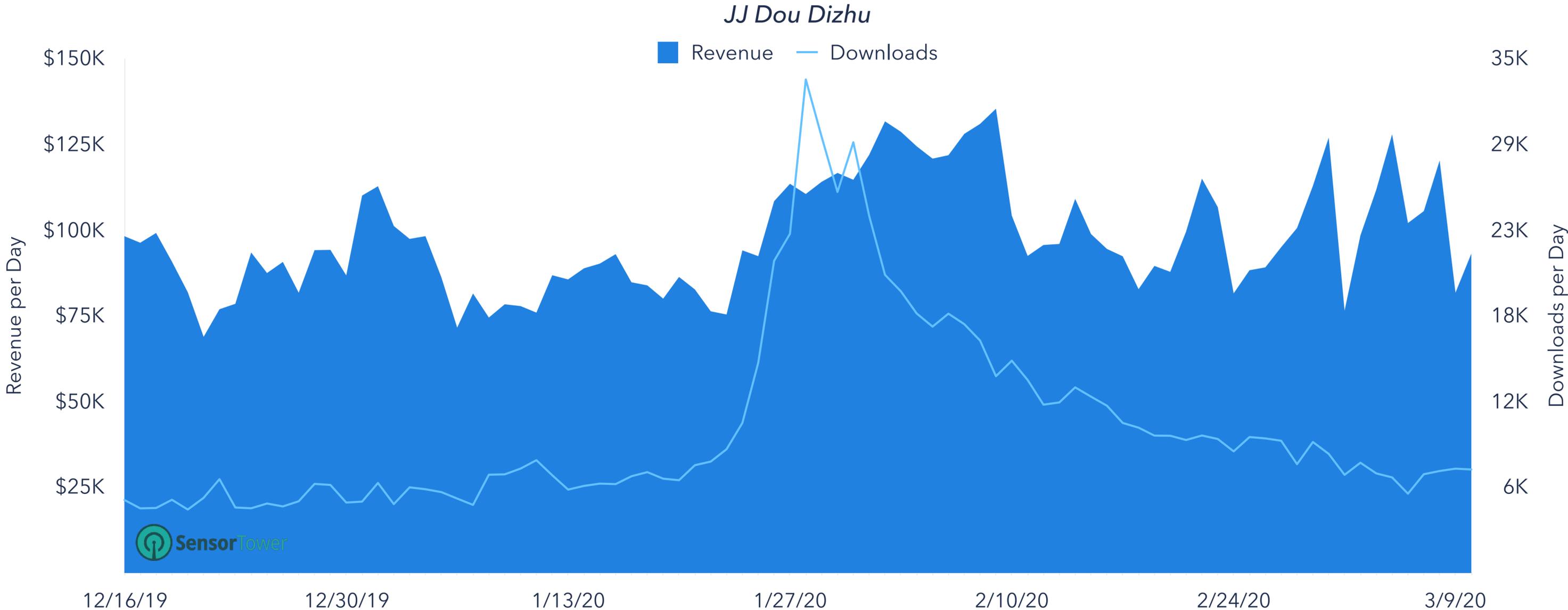


CASINO > GAME

***JJ Dou Dizhu* BY JJWORLD (BEIJING) NETWORK TECHNOLOGY**

REVENUE ANALYSIS

JJ Dou Dizhu (JJ斗地主-欢乐棋牌休闲合集) is a top-grossing casino app in China. Starting on 1/24/20, revenue was +25% and downloads were +172% MoM, likely driven by COVID-19 isolation measures.



Graph data is iOS China only. MoM = Month over month.

FEATURE TEARDOWN

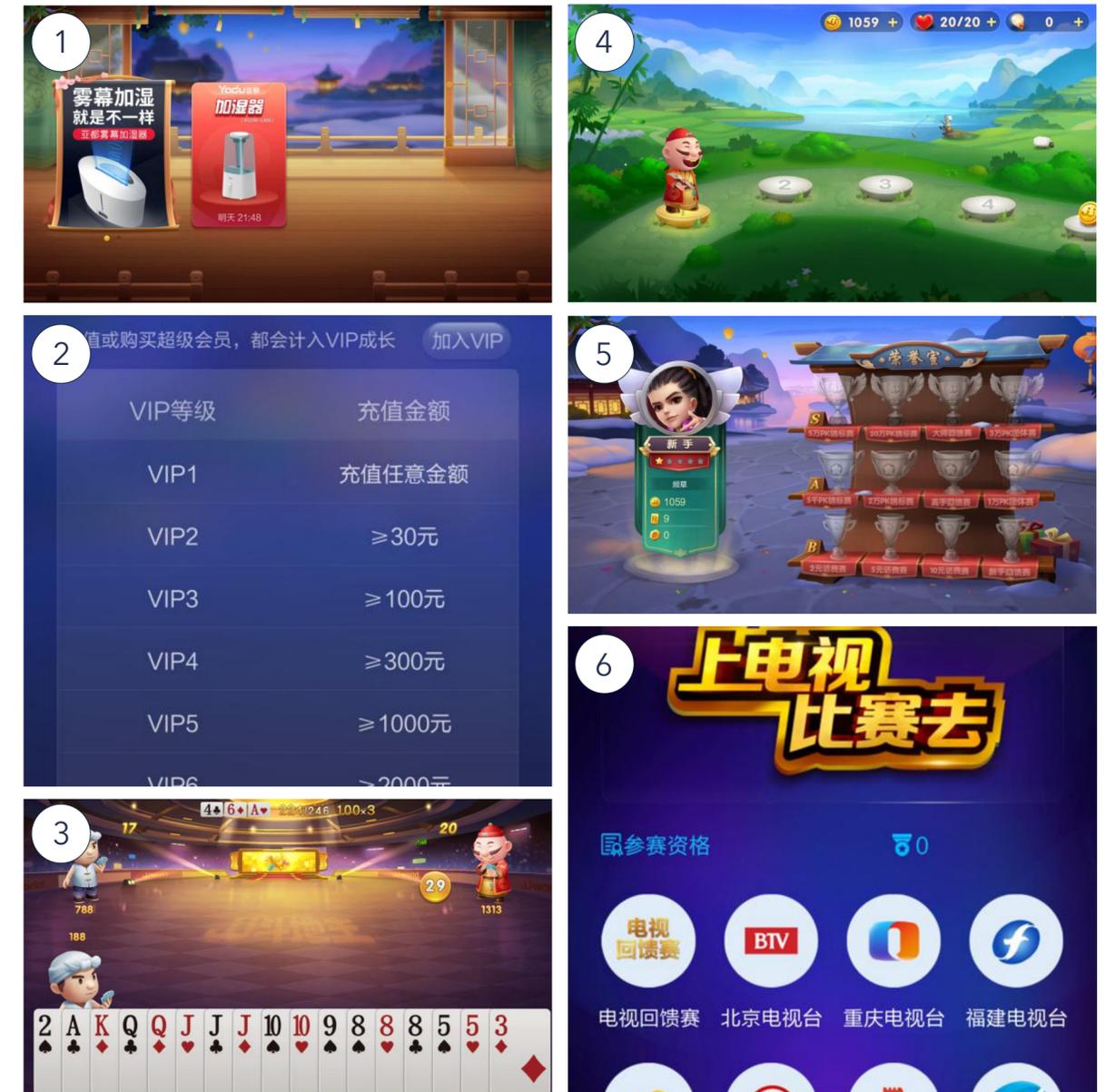
JJ Dou Dizhu offers mahjong, fishing, chess, and four types of poker games for digital and real-world rewards. An in-app livestreaming service broadcasts regional competitions.

Details

- Games, competitions, and events award in-game currencies, phone credits, and real-world goods (1).
- Seven VIP tiers provide different levels of customer service, username changes, exclusive competitions, birthday gifts, bonuses, and tournament rewards (2).
- Four poker types offer solo and team play: Dou Dizhu (2v1), Upgrade (2v2), Run Fast (4-player free-for-all), and Royalty (2v1, where one player can switch teams) (3).
- Training mode lets players practice their skills to earn a small amount of XP and currency (4).
- Three tiers of competitions have different prerequisites and rewards.
 - The lowest tier has no prerequisites.
- Players can upgrade titles and earn trophies by winning competitions (5).
- Regional livestreaming channels broadcast live competitions within the app (6).
 - Players must compete to qualify.

Make Livestreaming Easy

Livestreaming revenue is estimated to grow by over 20% in the next seven years.¹ Increase the prestige of competition events and make streams easy to access with in-app livestreaming—a popular trend in Chinese apps (see the [February 2020 RPG Report](#) or [email us](#) for a copy).



¹ [Video Streaming Market Worth \\$184.3 Billion By 2027](#)

BREAKOUT APP



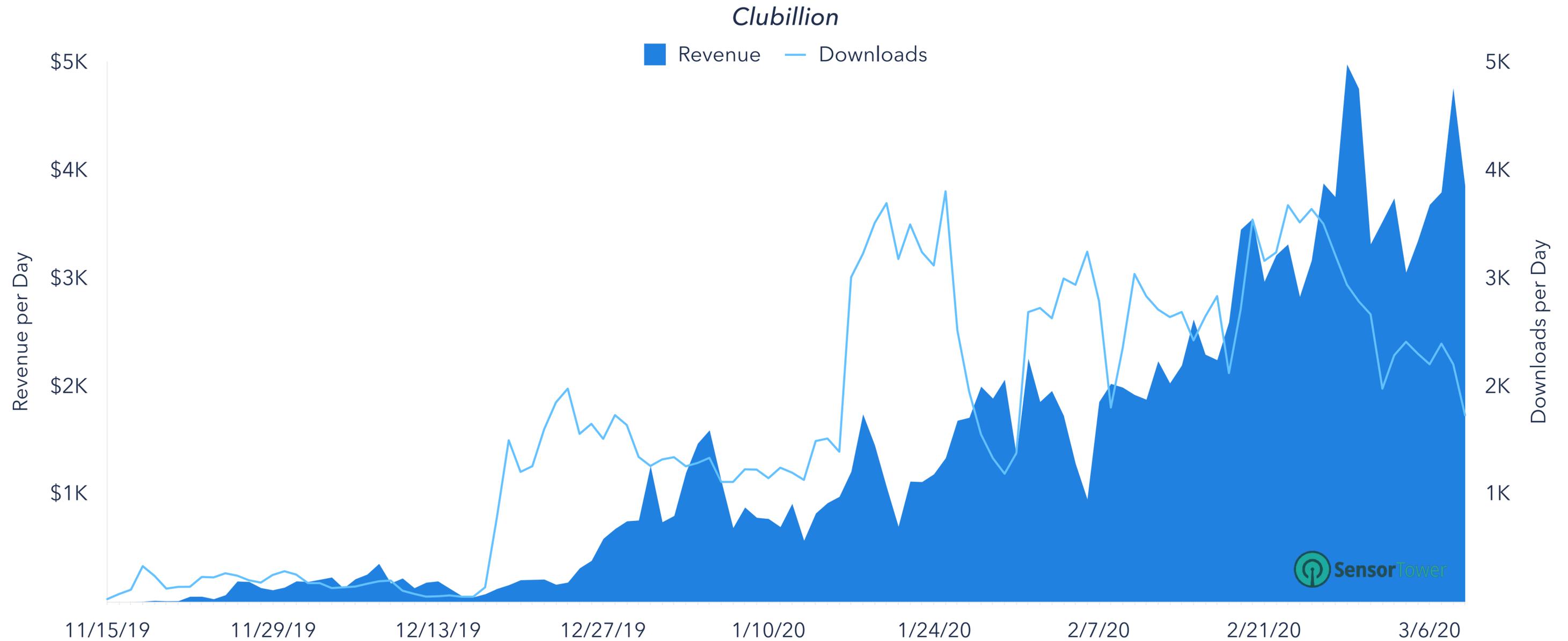
CASINO > GAME

CLUBILLION BY OUROBOROS

Clubillion is likely developed by the same publisher as *Winning Slots*, Hong Kong Triple Sevens Interactive Co. The [trademark](#) for “Clubillion” is owned by Hong Kong Triple Sevens Interactive Co., and the publisher is listed as T7 Games in the Google Play Store. Similar features between the two apps are noted in the Feature Teardown.

REVENUE ANALYSIS

Clubillion is growing rapidly. February revenue was +121% and downloads were +46% MoM. During this period, the app averaged \$2,631 in daily revenue and 2,887 daily downloads.



Graph data is iOS U.S. only. MoM = Month over month.

FEATURE TEARDOWN

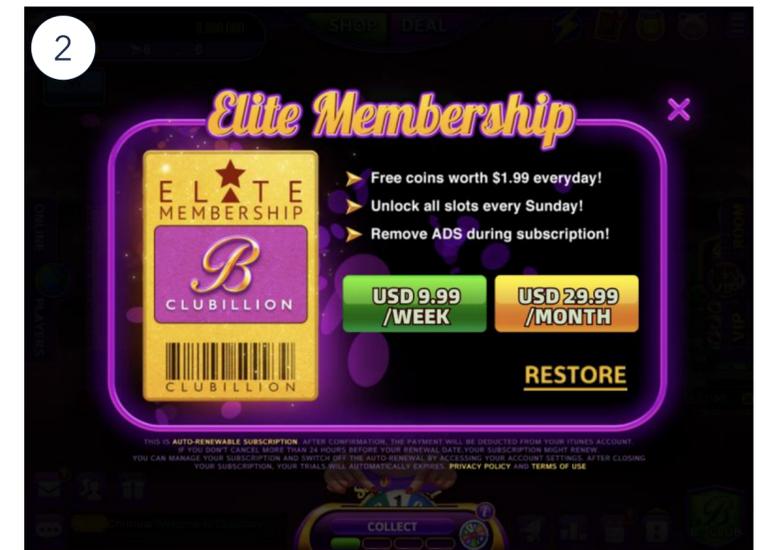
Clubillion includes an uncommon level of character customization for a casino app. Detailed leaderboards track players' personal records, competitions, and daily and weekly top winners.

Purchases and Bonuses

- The [B Clubillion](#) VIP system includes seven tiers with six types of benefits, including a VIP Slots area (1).
- [Elite Membership](#) subscriptions award daily coins, unlock all slots on Sundays, and remove ads (2).
- [Piggy Bank](#) prices start at \$0.99 and increase based on the number of coins held.
- [Scratch Cards](#) offer minimum rewards when players scratch 10 or 50 at once (3 and [video](#)).
- [Bonuses](#) include a daily login bonus and daily purchase deal (4).
- Large wins include a wheel spin multiplier purchase offer with a price based on win size (5).

Similarities to *Winning Slots*

- Several features are similar to the [Piggy Bank](#), [Winning Cards](#), and [Daily Bonus](#) in *Winning Slots*.



FEATURE TEARDOWN (CONT.)

Challenges

- [Challenges](#) include an achievement leveling system that increases difficulty and rewards as players level up.
- A quest system allows players to skip one of three tasks every 24 hours.
 - Completed tasks refresh on a timer or when players watch rewarded ads.
- Novice challenges reward new users for trying out core features like character customization and clubs.

Social Features

- [Profiles](#) display customizable characters, titles, VIP levels, chip balances, and more (1).
 - Titles are earned by completing certain challenges.
- [Leaderboards](#) include rankings for daily and weekly wins, tournaments, levels, and personal records (2 and 3).
- [Clubs](#) grant access to a club leaderboard, shop, daily login bonus, and message wall (4).
- Go [here](#) to see more images and videos.

Launch Information

- **Launch:** 12/28/19
- [App Store](#)

Only two other tracked casino apps currently invest in character customization: *Pop! Slots' Backstage* and *Pokerist's Avatars*.



REVENUE DRIVER



CASINO > EVENTS > MINI-GAMES

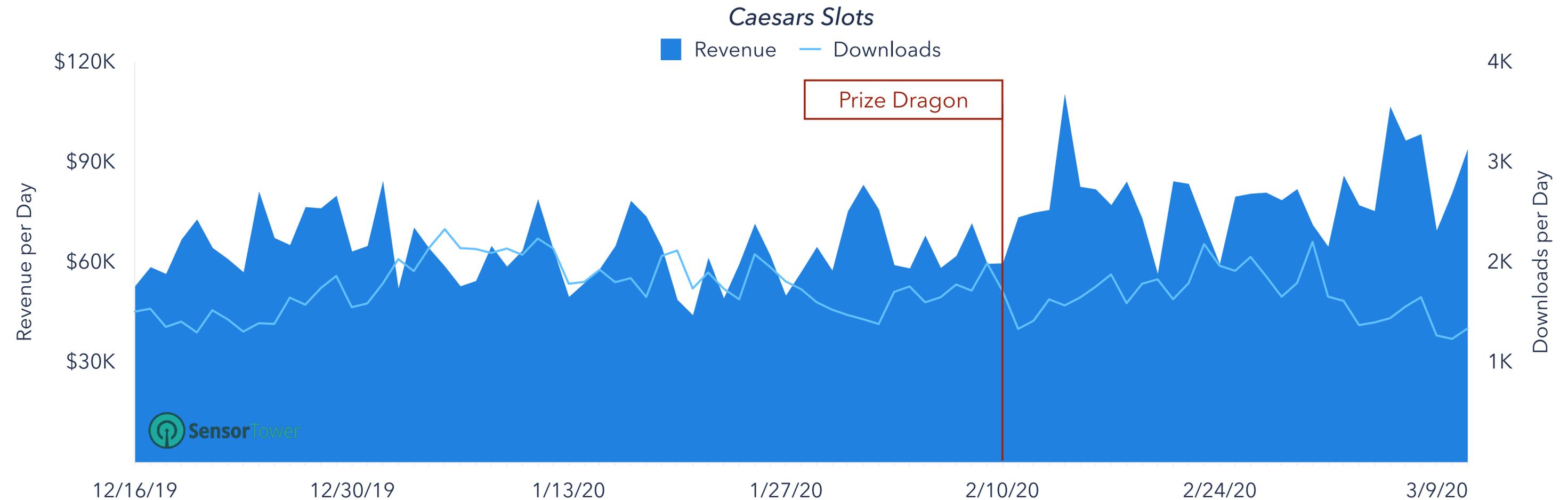
TAMAGOTCHI LEVELS FEATURE

Prize Dragon in *Caesars Slots*

REVENUE ANALYSIS

After the release of Prize Dragon, *Caesars Slots*' revenue was +26% and downloads were -6% MoM. Other concurrent events likely contributed to this revenue increase.

Releases
2/10: Version update
2/10: Prize Dragon levels feature
2/11-2/14: Puzzle Passion collection event
2/11-2/18: This Offer Won't Be Set in Stone! purchase event
2/11-2/18: Set in Stone mini-game event
2/12: Match Up Wizard purchase event
2/12: Version update
2/13: The Final Stretch expansion event (FB)
2/13: Midnight Chimes content release
2/14: Fall in Love purchase event
2/14: Valentine's Sale purchase event



Graph data is iOS U.S. only. MoM = Month over month.

FEATURE TEARDOWN

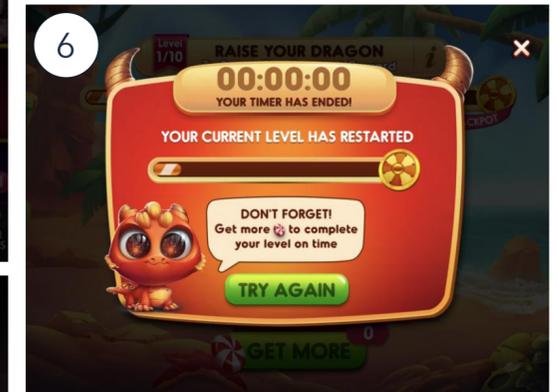
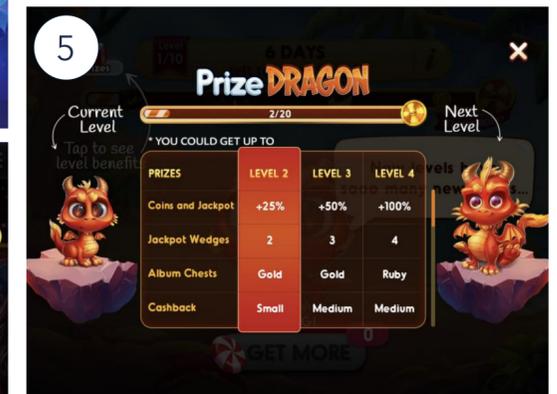
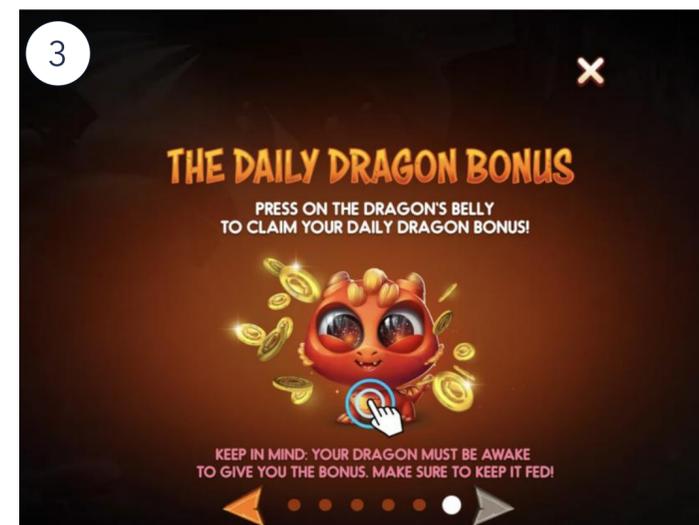
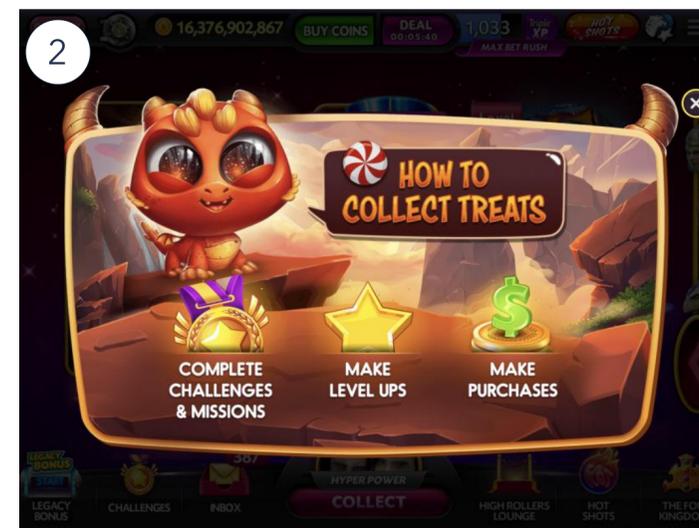
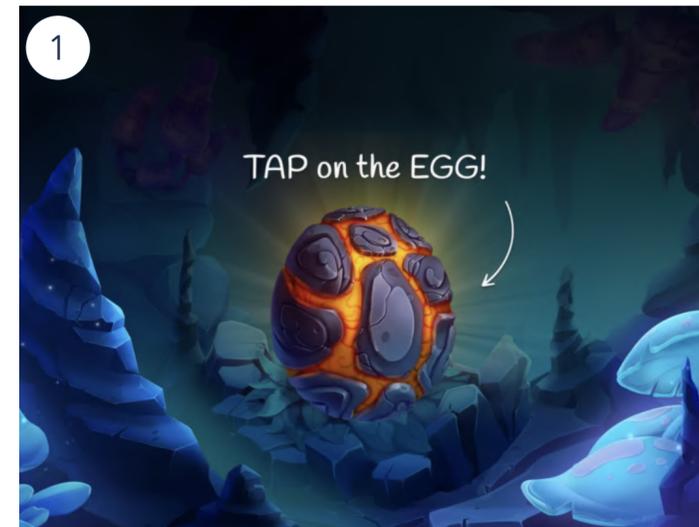
Players feed and level up a baby dragon by completing challenges, missions, XP levels, and purchases. The dragon must be leveled up within a time limit—otherwise level progress resets.

Details

- Players tap an egg to hatch and name a baby dragon (1).
- Challenges, missions, XP level-ups, and purchases award treats to feed the dragon (2).
- The dragon awards a daily bonus if it has been fed (3 and [video](#)).
- Feeding the dragon fills a meter for prizes at milestones (4 and [video](#)).
- Completing the meter increases the dragon's level ([video](#)).
- Each level awards a jackpot wheel spin and increased values for wins, jackpots, chests, and cashback (5).
- Players must advance to the next level within a time limit.
- If the timer runs out, progress for the current level is reset (6).
- An IAP offer awards a mini-stepper spin for three tiers of treats (7).

Additional Information

- See the [Prize Dragon](#) Library for more images and videos.



PRODUCT INSIGHTS

Give digital pets empathetic responses and expressive faces to increase players' emotional attachment. Then, use pets to deliver personalized promotions.

Insight Details

- **Enhance the companionship of digital pets with empathetic reactions based on gameplay outcomes.** Tamagotchi pets create feelings of companionship in their owners, so much so that the “[Tamagotchi effect](#)” is used to describe the general tendency to become emotionally attached to machines and virtual objects.

Research shows that outcomes during play can be used to model players' emotions and simulate empathetic responses that increase emotional attachment to digital companions—like commiseration over losses, celebrations after wins, and encouragement following near-wins.²

- **Use a range of expressive faces throughout play to maximize emotional impact.** Facial expressions are a vital part of how humans communicate emotion, with meanings that span cultures.³ Even low-fidelity digital facial expressions can provoke neural responses that closely resemble responses to human expressions, with stronger responses for stronger emotions. Sadness, happiness, surprise, and fatigue are the most easily recognized emotions.⁴

Prize Dragon successfully employs a range of facial expressions on the dragon screen (1). However, the in-game popover has only one expression—potentially representing a missed opportunity (2).

- **Make personalized promotional offers through pets based on players' past behaviors and current context.** One survey found that 90% of customers prefer personalized promotions and 80% are more likely to do business with a company that offers personalized experiences.⁵ The impact of personalized ads is even greater when users are engaged in a task with high mental engagement, leading to longer and more frequent attention than unpersonalized ads.⁶

For example, *Candy Crush Soda Saga*'s [Golden Tickets](#) event offered players custom purchase packages for collecting a certain number of tickets, with items that scaled to players' current progress (3).

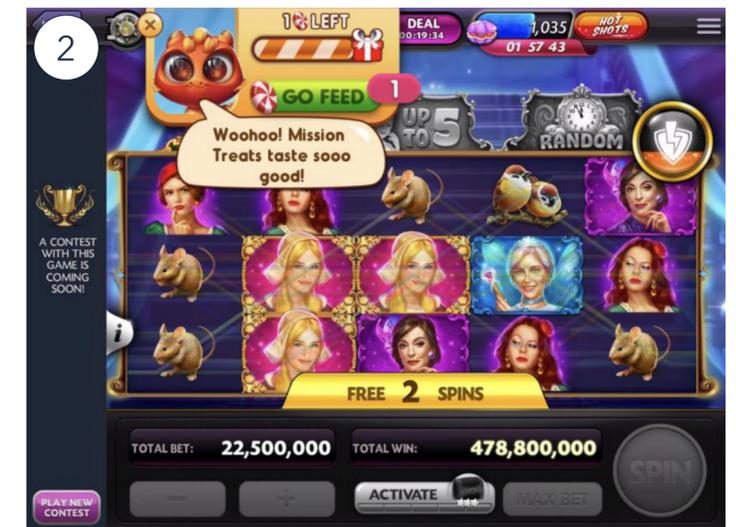
² [Using Empathy to Improve Human-Robot Relationships](#), p. 7

³ [Cross-Cultural and Cultural-Specific Production and Perception of Facial Expressions of Emotion in the Wild](#)

⁴ [Assessment of human response to robot facial expressions through visual evoked potentials](#), p. 650-652

⁵ [New Epsilon research indicates 80% of consumers are more likely to make a purchase when brands offer personalized experiences](#)

⁶ [Tracking users' visual attention and responses to personalized advertising based on task cognitive demand](#), p. 871-872



MARKET WATCH



NOTABLE RELEASES I

App	Library	Description
<i>Bingo Bash</i>	Gem Trade-Ins currency feature	<ul style="list-style-type: none"> Various combinations of gems can be traded for bingo chips, coins, and boosts (1). A pop-up advises players that gems will soon be removed from the app.
<i>Bingo Party</i>	Card Album Euro Cruise collection feature	<ul style="list-style-type: none"> Players collect starred cards from levels, purchases, and timed chests. Stars fill a meter with rewards at milestones. <ul style="list-style-type: none"> A \$19.99 pass activates a second tier of rewards and a collection feature that unlocks after players fill the meter (2). Completing levels fills a rank meter. <ul style="list-style-type: none"> Ranks award permanent boosts, like more frequent chests and increased tickets.
	Romantic Garden mini-game event	<ul style="list-style-type: none"> Bingo games award packs containing custom decorations for a garden (video).
<i>Caesars Slots</i>	Set in Stone mini-game event	<ul style="list-style-type: none"> Players roll dice to advance on a game board. Mission spaces require a challenge to continue. <ul style="list-style-type: none"> Players can collect or purchase cards to skip challenges. Hammer spaces award hammers that carve a statue. <ul style="list-style-type: none"> A wheel spin determines the strength of the hammer. Filling the statue's meter completes the board (3).
<i>DoubleU Casino</i>	DeadWood Bounties Beta collection feature	<ul style="list-style-type: none"> Players spin to earn chests. Chests upgrade buildings (4). Upgraded buildings award badges. Badges trigger a pick'em mini-game to capture outlaws for additional chests (video).



NOTABLE RELEASES II

App	Library	Description
<i>Hit It Rich</i>	Quest for the Chest competition event	<ul style="list-style-type: none"> • Players spin to collect keys in four-person teams. • Keys fill a meter and advance teams on a map (1 and video). • Bonus spaces on the map trigger wheel spins that award coins and additional keys. • The first team to collect 300 keys wins the chest.
<i>House of Fun</i>	Daily Rush missions feature	<ul style="list-style-type: none"> • Players complete a series of three daily challenges for rewards. • Challenges either specify a machine or offer a choice between three machines (2).
<i>Wizard of Oz: Casino Slots</i>	Daily Challenges Deluxe challenge feature	<ul style="list-style-type: none"> • Players complete daily challenges to earn rewards and check marks. • Check marks fill a weekly meter for rewards at milestones (3).
In Soft Launch		
<i>Castle Builder - Epic Slots</i> by Tapinator	Castle Builder - Epic Slots casino app	<ul style="list-style-type: none"> • This video slots app soft-launched on 10/1/19 in Australia, Canada, and Great Britain. • Players spin to earn materials (4). • Materials are used to build castles. • Castles unlock bonus games. • Other mechanics include a map progression, character leveling, free spins, and expanding wilds.

Quickly review all features and machines

Filter the [Library Tool](#) by month and year to see all new releases.



APPENDIX



LIQUID & GRIT SLOTS PERSONAS

Participants from the U.K. and U.S. (N=1,299) were surveyed about their mobile gaming use. The data produced five personas with distinct patterns of 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 & Grit partners with these premier market research and analytics companies to infuse our reports with the most relevant and detailed gaming personas, data, and statistics available.

Sensor Tower	Kinrate Analytics	Quadrant Strategies
<p>Mobile App Store Intelligence Sensor Tower website</p> <p>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.</p> <p>Clients harness Sensor Tower’s suite of app intelligence tools to:</p> <ul style="list-style-type: none">▶ 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.	<p>Player Personas Kinrate Analytics website</p> <p>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.</p> <p>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.</p> <p>The products of Kinrate Analytics have been developed in university-led research projects in collaboration with economists, psychologists, game scholars, and data scientists.</p>	<p>Market Research Quadrant Strategies website</p> <p>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.</p> <p>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.</p>



CASINO 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 those in the bonuses family)

“There is hope in dreams, imagination, and in the courage of those who wish to make those dreams a reality.”

– Jonas Salk

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