



LIQUID&GRIT

CASINO REPORT

Competitive Research and Actionable Product Recommendations

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JUNE

2020

REVENUE DRIVER



Important features and events that boosted revenue, plus relevant product data, research, and recommendations.

CASINO > FEATURES > COLLECTIONS

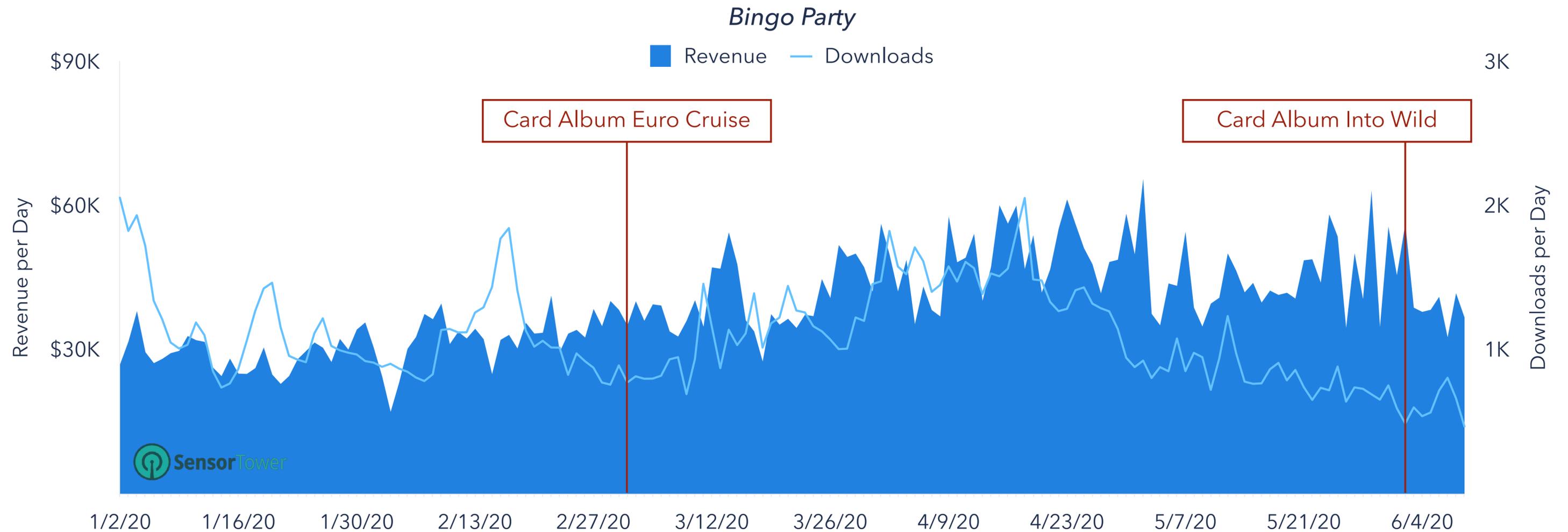
HYBRID COLLECTION WITH MAP, LEVELING, AND BATTLE PASS

Card Album Euro Cruise and Card Album Into Wild in *Bingo Party*

REVENUE ANALYSIS

After the release of Card Album Euro Cruise, *Bingo Party's* revenue was +45% and downloads were +15% 2Mo2M.

Releases
3/2: \$1.99 First Payment Only purchase event
3/2-3/3: \$19.99 Halloween Carnival purchase event
3/2-3/6: Chess Tournament mini-game event
3/2-3/9: Odyssey Childlike quest event
3/2-6/1: Card Album Euro Cruise collection feature
• 6/2-ongoing: Card Album Into Wild collection feature
3/4:
• \$4.99 New Tickets Sale 1 IAP to #10 (NPL)
• \$19.99 A Big Deal IAP moved +1 to #3
*NPL = Not previously listed



2Mo2M = 2 months compared to the previous 2 months.

Graph data is iOS U.S. only.

FEATURE TEARDOWN

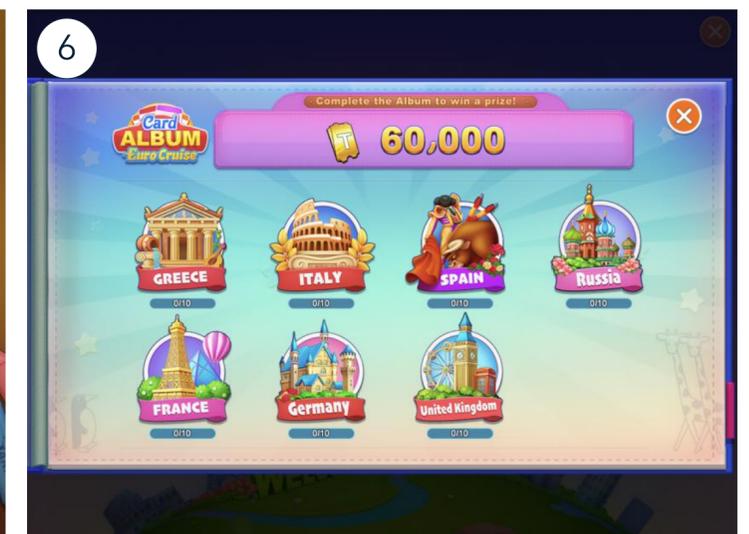
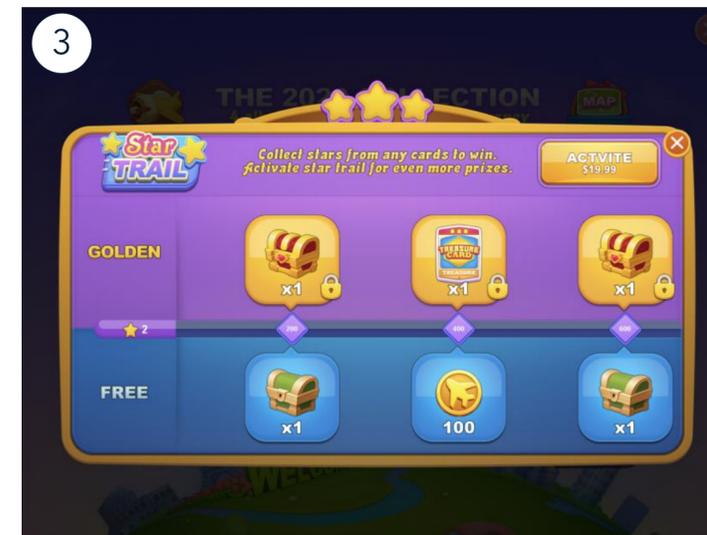
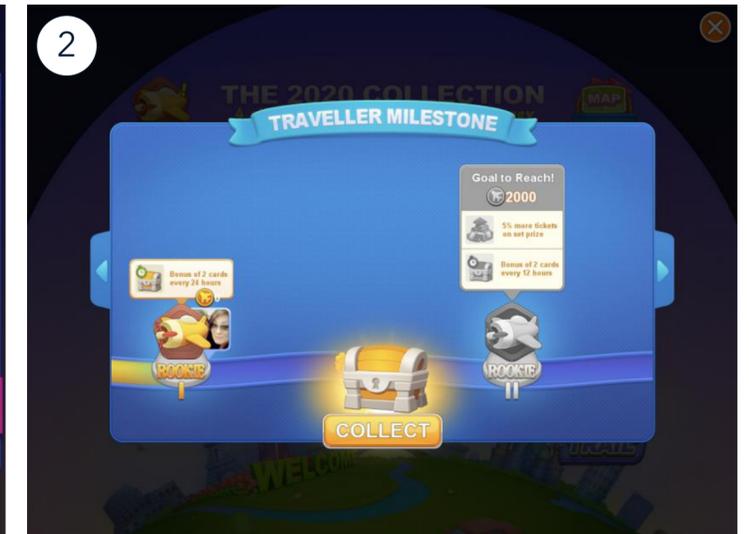
A series of collection events maintain players' progress throughout the year for increased rewards and more frequent bonuses.

Details

- Players collect chests of starred cards from bingo play, events, and purchases.
- Stars fill album meters for traveller points and tickets at milestones (1).
- Traveller points increase traveller levels for improved rewards and more frequent timed chests (2).
- Traveller level progress persists across four albums that run throughout 2020.
- Stars also fill an app-wide star meter with prizes at milestones (3).
- A \$19.99 premium pass unlocks a second tier of rewards.
- For premium pass holders who complete the meter, every additional star collected awards a ticket (4).
- Players visit cities on a map by collecting cards for each city (5).
- Cities award tickets the first time players visit.
- Each new city visited fills a meter for additional cards at milestones.
- Completed collections of multiple cities award tickets (6).

Additional Information

- See the [Card Album Euro Cruise](#) and [Card Album Into Wild](#) Libraries for more images and videos.



PRODUCT INSIGHTS

Drive engagement and spending in collection events with ongoing XP progressions, event-exclusive cosmetics, and free starting items.

- **Persistent progress across events has contributed to multiple revenue-driving releases.** *Bingo Party's* Card Album collections award XP levels that endure for all 2020 album events (1). Other casino apps have had success with similar mechanics: *Bingo Blitz's* August 2019 [Euro Bites](#) collection event, which saw revenue grow +23% WoW, promised XP level perks that would carry over to future events. Last month, *Lotsa Slots'* revenue increased +18% 50Do50D after the release of the [Mission Blitz](#) daily challenge feature, which awards starting currency for each season based on players' previous XP levels.

- **“Free” initial progress greatly increases motivation.** The endowed progress effect suggests that people are much more likely to work toward a goal if they are given an apparent head start. A study on customer loyalty cards found that subjects given two initial stamps completed nearly twice as many cards as a control group without free stamps (34% vs. 19%), even though both groups had to make *the same number of actual purchases*.¹

In RPG, *Empires & Puzzles'* revenue increased +23% MoM following the release of its [Season III](#) content expansion, which included free summon events at the start of each new area. Jumpstarting players' progress with a few bonus items at the start of collection events will likely lead to higher engagement.

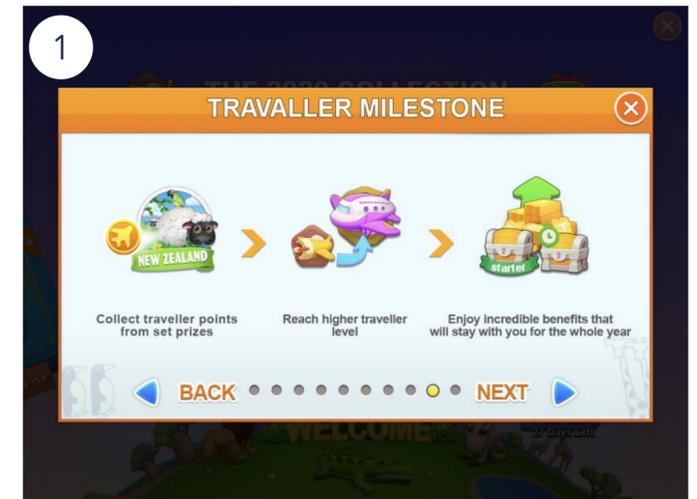
- **Event-exclusive cosmetics drive spending and engagement.** Among eight custom design events in popular puzzle apps, those that tied unlockable cosmetics to event progression saw 1.8x the revenue increase of those that did not (2).² *Bingo Party's* star meter has a similar type of reward progression but lacks any prestigious, event-exclusive incentives—potentially representing a missed opportunity.
- **Unlockable event cosmetics can have an even greater effect if visible to other players.** One experiment showed that user achievement badges on a peer-to-peer marketplace site increased four types of key user actions by 87-408%.³

The study's author suggested that these badges succeeded by creating clear goals that triggered social proof and social comparison. Social proof demonstrates to other users that goals are both achievable and worth achieving, while social comparison makes users want to perform at the same level as their peers.

¹ [The Endowed Progress Effect: How Artificial Advancement Increases Effort](#), p. 506

² [Event Currencies with IAP Bundles](#)

³ [Do badges increase user activity? A field experiment on the effects of gamification](#), p. 471-476



MISSION & CHALLENGE TRENDS



Investment trends for mission and challenge releases.

Slots apps:

Big Fish Casino, Caesars Slots, Cash Frenzy, Cashman Casino, DoubleDown Casino, DoubleU Casino, Game of Thrones Slots, Gold Fish Casino, Heart of Vegas, Hit It Rich!, House of Fun, Huuuge Casino, Jackpot Magic Slots, Jackpot Party, Lightning Link Casino, Lotsa Slots, my KONAMI, myVEGAS, POP! Slots, Quick Hit Slots, Scatter Slots, Slotomania, and Wizard of Oz: Casino Slots

Bingo apps:

Bingo Bash, Bingo Blitz, Bingo Party, Bingo Pop, and Bingo Showdown

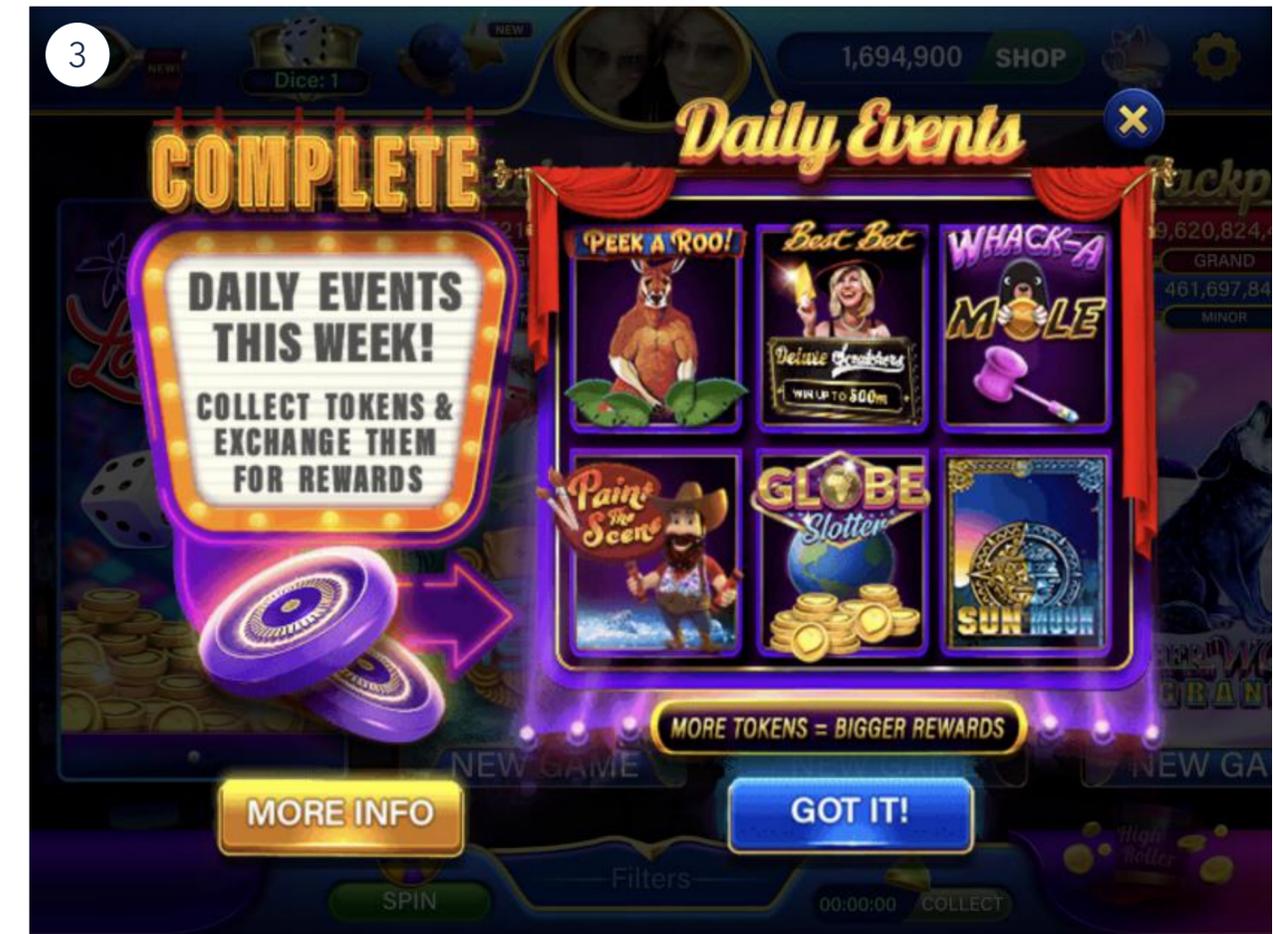
Poker apps:

Governor of Poker 3, Mega Hit Poker, Poker Heat: Texas Holdem Poker, Pokerist, WSOP, and Zynga Poker - Texas Holdem

NEW DAILY CHALLENGE/MISSION RELEASES DRIVE REVENUE

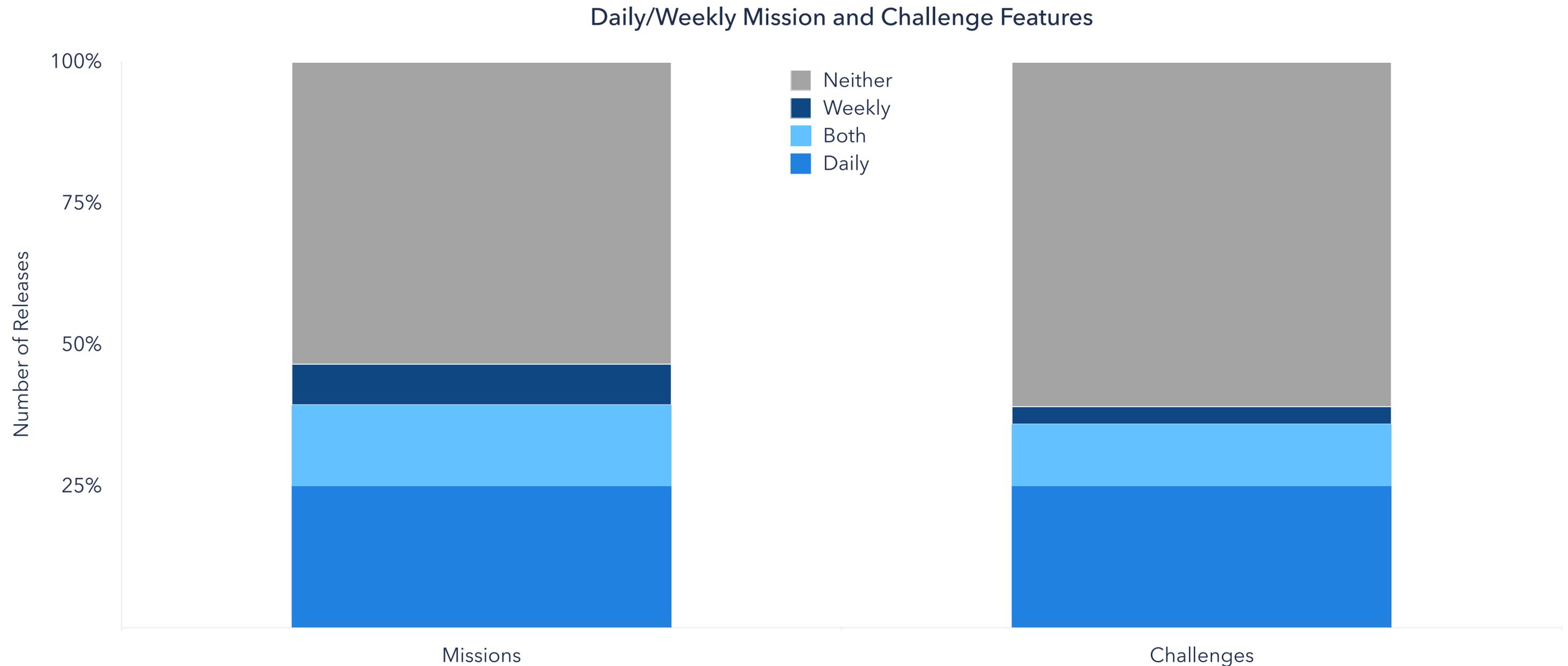
Mega Hit Poker's revenue was +63% and downloads were +58% MoM following the release of new [daily challenge](#) (1) and [XP leveling](#) (2) features on 3/16/20.

Heart of Vegas' new [daily mission](#) event (3) increased revenue +19% 4Do4D following its release on 4/14/20. This may have been a test of an upcoming feature or regular event.



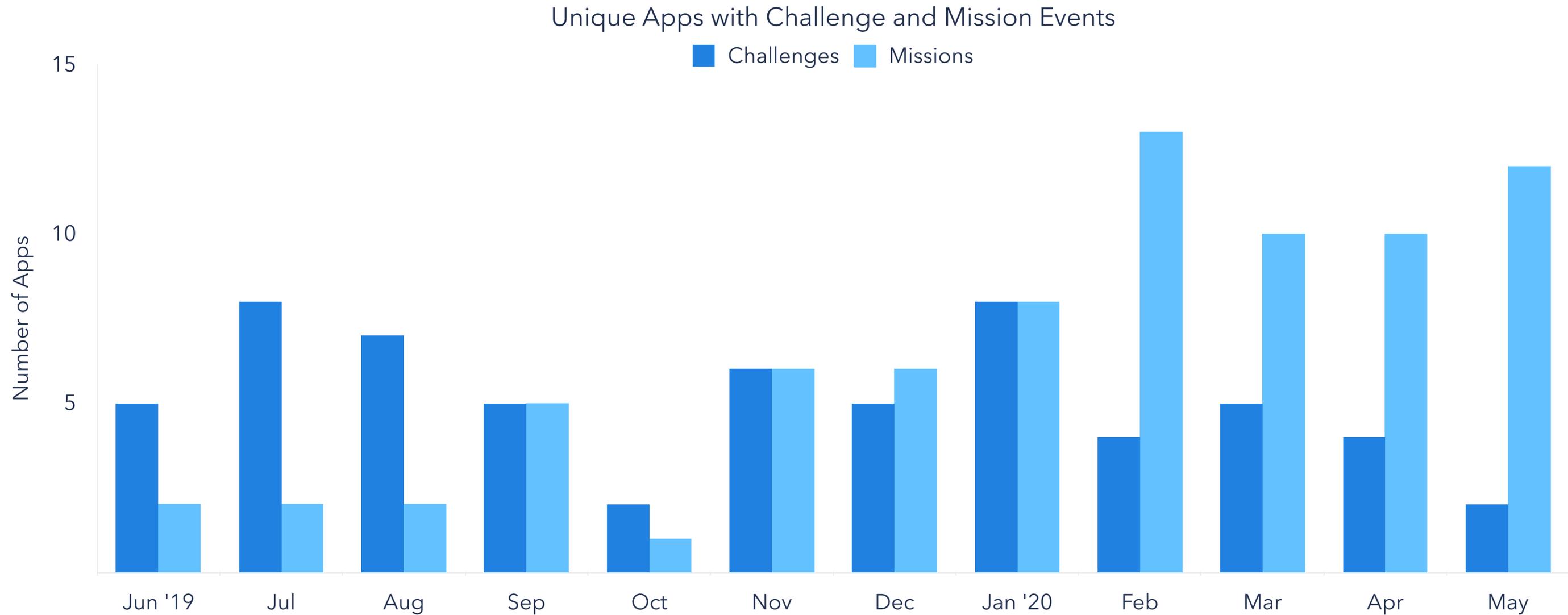
NEARLY HALF OF MISSIONS AND CHALLENGES ARE DAILY OR WEEKLY

Daily or weekly tasks make up 46% of mission features and 39% of challenge features in tracked apps.



MORE APPS RELEASING MISSION EVENTS IN 2020

In the last six months, the number of tracked apps investing in mission events has increased +228% 6Mo6M, while the number of those investing in challenge events has decreased -15%.

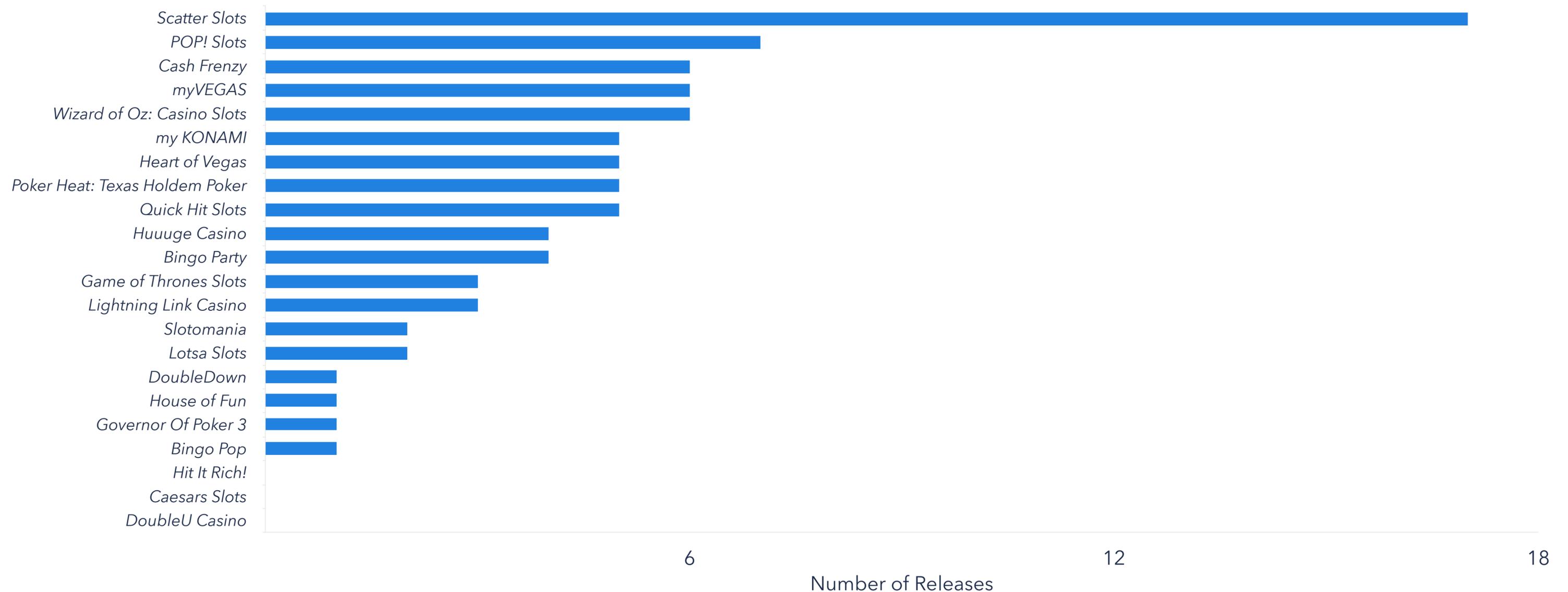


6Mo6M = 6 months compared to the previous 6 months.

NEW MISSION EVENT LEADERS IN 2020

Six apps accounted for 56% of all mission event releases by tracked apps in the last six months: *Scatter Slots*, *POP! Slots*, *Cash Frenzy*, *myVEGAS*, *Wizard of Oz: Casino Slots*, and *my KONAMI*. These same apps released just 20% of all mission events during the preceding six months.

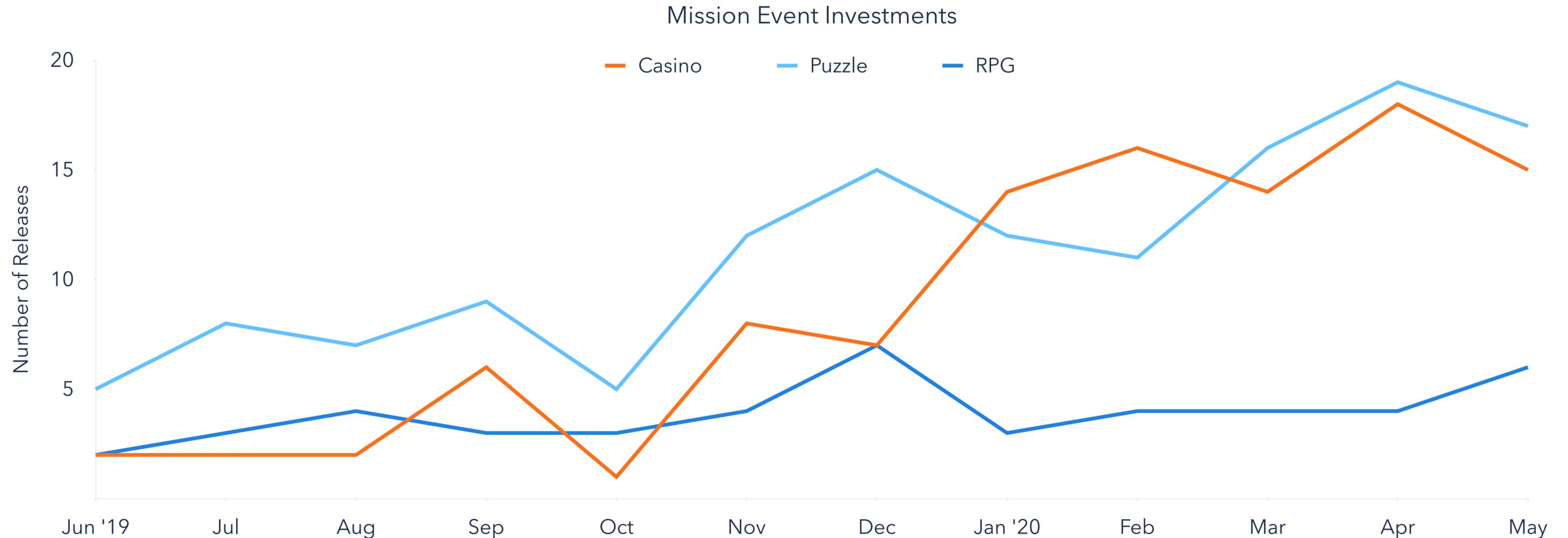
Mission Event Releases (Dec '19-May '20)



MISSION EVENTS INCREASE ACROSS GENRES

Mission event releases have increased across all three genres since December: +320% in casino, +96% in puzzle, and +47% in RPG 6Mo6M.

During the same period, challenge event releases decreased in all three genres (not shown): -3% in casino, -76% in puzzle, and -12% in RPG.



6Mo6M = 6 months compared to the previous 6 months.

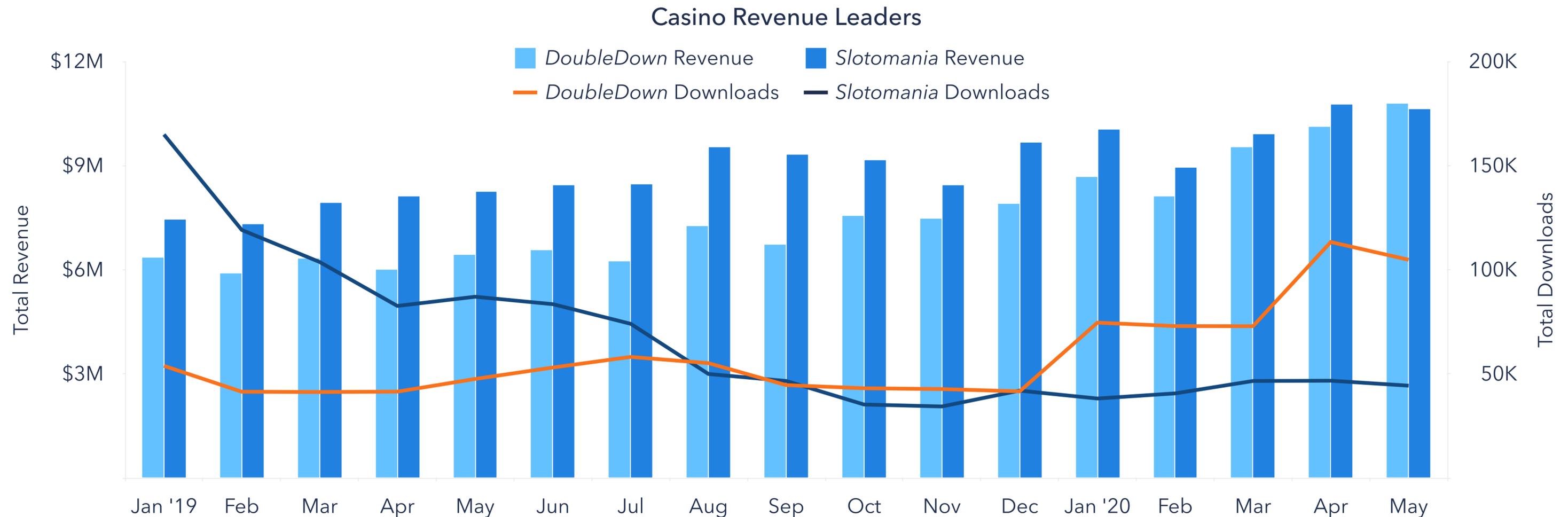
REVENUE MOVEMENT



Big revenue changes from specific apps or across the genre.

DOUBLEDOWN PASSES SLOTOMANIA AS REVENUE LEADER

In May, *DoubleDown* surpassed *Slotomania* as the highest-grossing casino app. *DoubleDown*'s downloads have grown an average of +25% MoM since January 2020, while *Slotomania* has averaged just +1.5% MoM. This follows a -75% decrease in *Slotomania*'s monthly downloads last year.



MoM = This month compared to the previous month.
Graph data is iOS U.S. only.

MARKET WATCH



New apps and notable releases from established competitors.

BREAKOUT APPS

Poker Showdown: Wild West Duel by Tinker Troupe

App Details

- Players bet bullets and play cards to the center to create the best poker hand in this poker-RPG hybrid.
 - Winning hands shoot bet bullets to damage opponents' health.
- RPG mechanics include unlockable heroes, cards with unique abilities, and upgradable health and attack stats (1).
- Story missions, side missions, and PvP battles unlock upgradable map regions.
- See additional images and videos in the Feature Database [here](#).

Launch Information

- Soft-launched in Australia: 5/27/20
- Worldwide release: 5/30/20
- Average daily revenue (since release): \$4
- Average daily downloads (since release): 76
- View *Poker Showdown: Wild West Duel* on the [App Store](#).

Artrix Poker by Outerdawn Limited

App Details

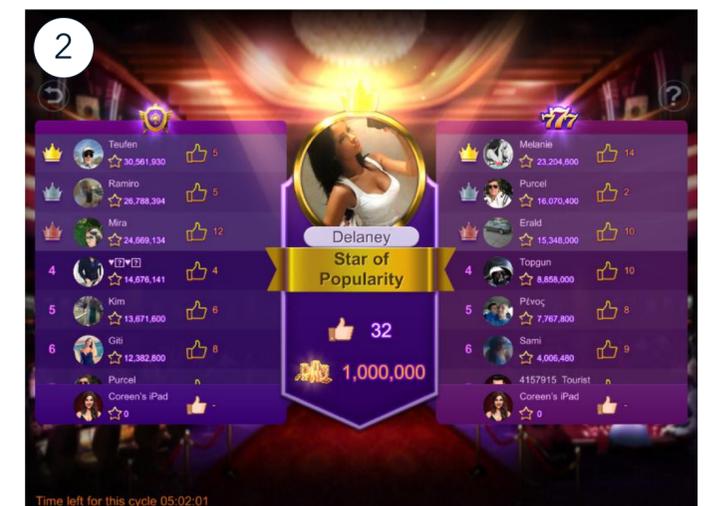
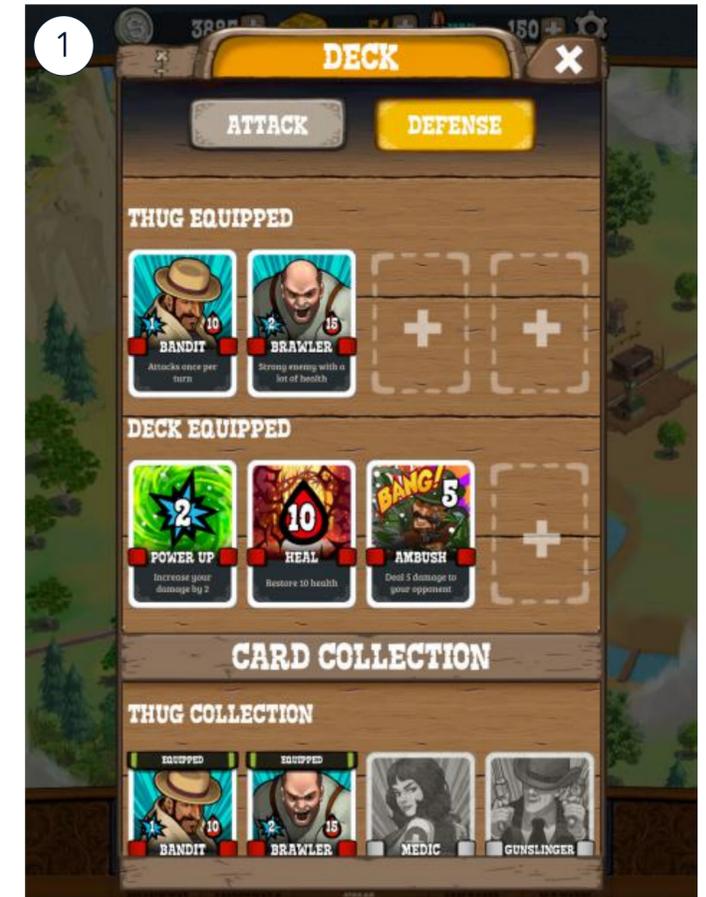
- A 24-hour leaderboard allows players to vote for their favorite top-10 player.
 - The player with the most votes earns a chip prize (2).
- New players are given seven days of login rewards.
- Players can choose when to activate timed boosts.

Launch Information

- Worldwide release (not available in the U.S.): 4/15/13
- Average daily revenue (last 90 days): \$6,629
- Average daily downloads (last 90 days): 564
- View *Artrix Poker* on the [App Store](#).

Puzzle players frequently request this type of control over timed boosts.⁴

⁴ See examples from the *Candy Crush Saga* player forums: 1, 2, and 3.



NOTABLE RELEASES I

App	Library	Description
Bingo Blitz	Farmer's Joy expansion feature	<ul style="list-style-type: none"> • Players collect fruit during bingo rounds. • Fruit advances players on a map (video). • Players choose which path to take at intersections (1). • Collecting four bones on the map awards chips. • Reaching a pig awards the grand prize (video). • Players can spend chips to increase fruit size on bingo cards and advance more quickly.
Bingo Party	Level Rush Challenge challenge feature	<ul style="list-style-type: none"> • Leveling up 4 or more times within 10 hours awards a treasure card (2).
Caesars Slots	Fortune's Battle collection feature	<ul style="list-style-type: none"> • Players collect items from spins, purchases, challenges, and levels. • Power missions award power items. • Completing sets of power items awards scratch cards (3 and video). • Completing all sets of items awards the grand prize.
Cash Frenzy	Bloom Pick Frenzy collection event	<ul style="list-style-type: none"> • Hands collected during spins fill a meter. • Filling the meter awards a pick'em bonus for chest keys, extra picks, prize boosts, jump symbols, and more. • Jump symbols advance players on a series of platforms and award a chest. <ul style="list-style-type: none"> • Chest slots store up to five unopened chests at a time (4). • Completing all platforms awards the grand prize.

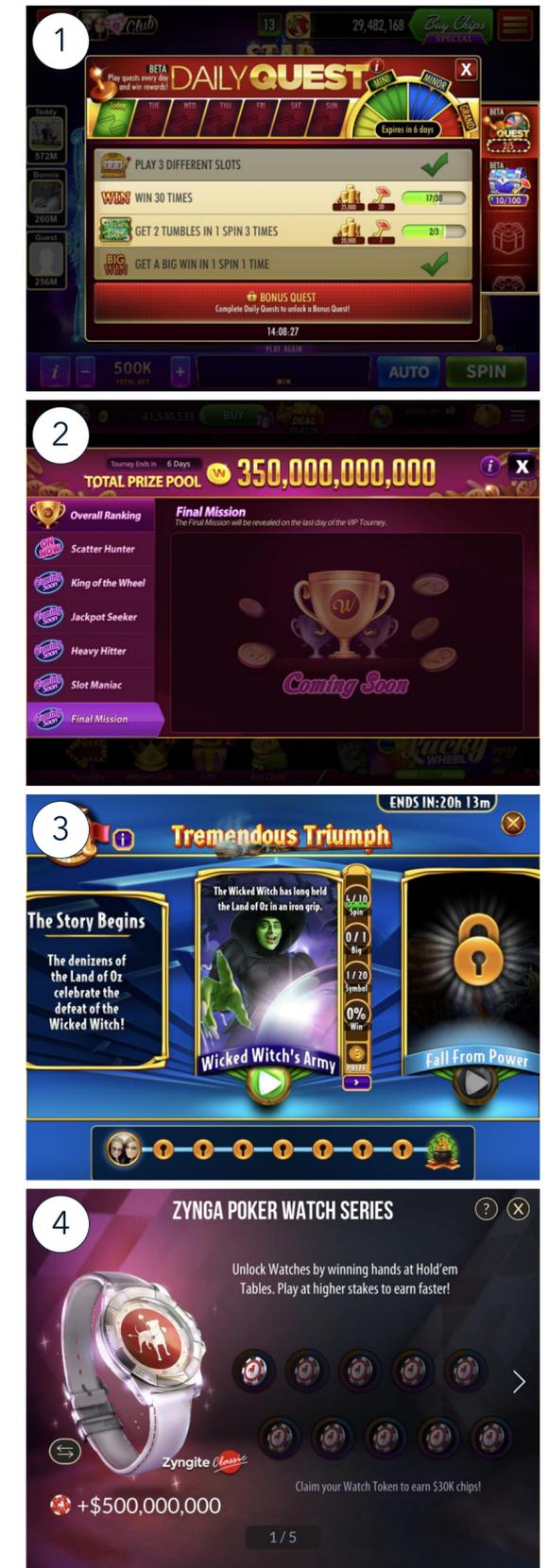


NOTABLE RELEASES II

App	Library	Description
DoubleDown	Daily Quest Beta challenge feature	<ul style="list-style-type: none"> Daily challenges award coins and chest keys. <ul style="list-style-type: none"> Completing all daily challenges for one day awards a stamp. Completing all daily challenges for one week awards a spin on a prize wheel (1). Stamps increase wheel prizes. Base game wins fill a chest meter for a timed chest. <ul style="list-style-type: none"> Opening a chest can randomly trigger a level increase. Chest meter progress resets if players don't login within 12 hours.
DoubleU Casino	Weekly VIP Tourney competition feature	<ul style="list-style-type: none"> VIP players complete daily missions to compete on a weekly leaderboard. The last mission is not revealed until the final day of the tournament (2).
Wizard of Oz Slots	Tremendous Triumph mission event	<ul style="list-style-type: none"> Players complete challenges to unlock a series of machines and progress through a story (3). Completing the story awards the grand prize.
Zynga Poker - Texas Holdem	Zynga Poker Watch Series collection event	<ul style="list-style-type: none"> Winning poker hands fill a meter. Filling the meter awards tokens that can be exchanged for a watch (4). A series of five watches awards increasing prizes.

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	Definition
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 new user flows, ratings, and surveys

Family	Definition
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 in-app items
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)

“Every act you have ever performed since the day you were born was performed because you wanted something.”

– Andrew Carnegie

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