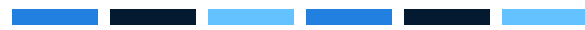




Casino Report

Competitive research and actionable product recommendations

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MARCH

2018

INTRODUCTION



Dear Product Owner,

This month we added a new section, Impact Features, highlighting features that drove observable revenue. New Innovations now covers features without observable revenue, but that could either improve retention and/or have potential upside on the next iteration.

Impact Features

Deeply integrated versions of Collections, titled Collection Sets, are generating value in both the Casino and Puzzle markets. Consider either upgrading a current Collection system or making this an upcoming Bold Beat feature.

For a revenue-driving event, add a raffle mechanic to an already successful jackpot-based event to increase whale participation *and spend*. See Jackpot Raffles for more details.

To extend the value of a successful event, release a pay-to-unlock version shortly after the event's initial release. Read through Daily Streak Events to see how Poker Heat capitalized on back-to-back events.

New Innovations

Caesars Slots expanded on Collection Sets by adding stories and chests. More elaborate features, like this one, are becoming the norm ... adjust your roadmap *and mindset* accordingly.

Market Watch

The market invested heavily in Collections. Huuuge Casino released more iterations of Insurance Deals. Product Madness continued to release events. And, Pokerist added slot machines.

"We choose to go to the Moon in this decade and do the other things, not because they are easy, but because they are hard; because that goal will serve to organize and measure the best of our energies and skills ..." –John F. Kennedy

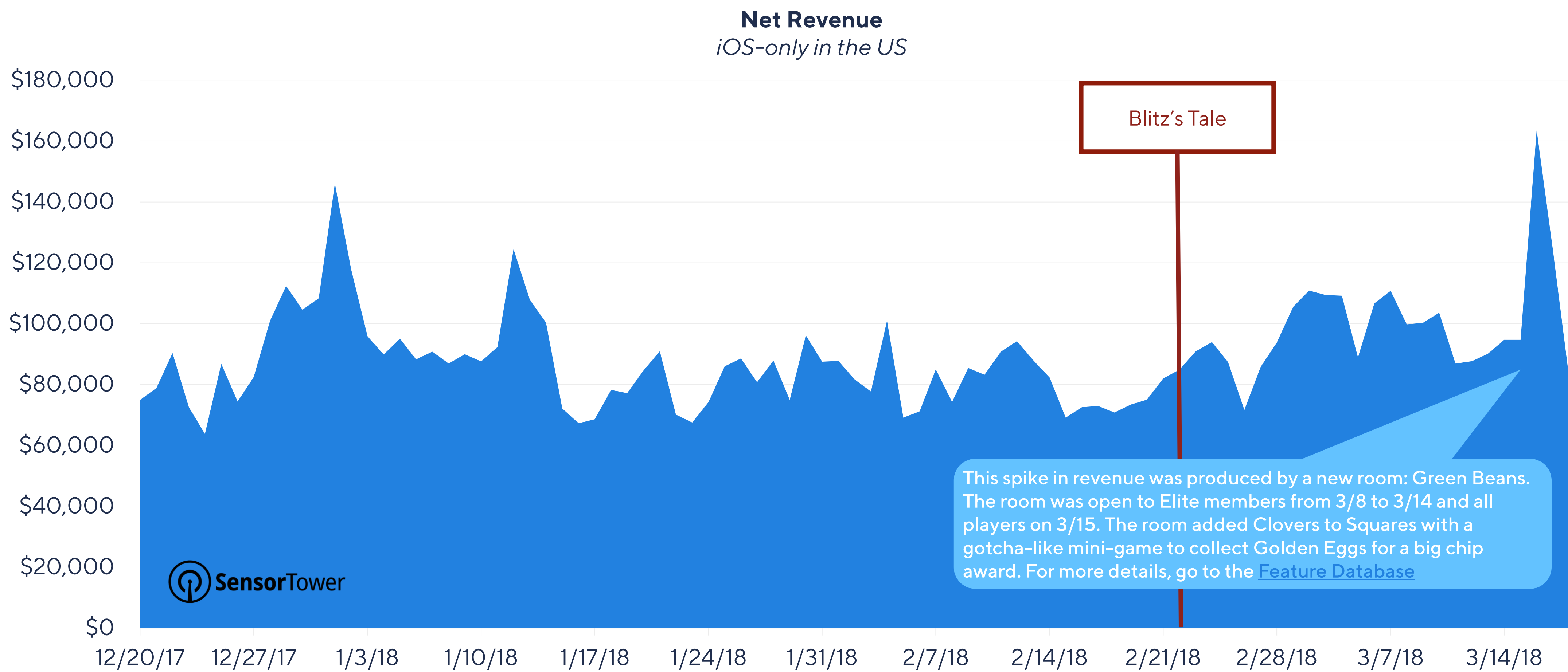
Brett Nowak
Editor-in-Chief

IMPACT FEATURES

Features that appear to drive observable revenue

COLLECTION SETS

Bingo Blitz enjoyed stronger revenue after the release of *Blitz's Tale*, a reskin of the Collection Set feature *Jingle Blitz*



Revenue data comes from Sensor Tower

COLLECTION SETS

Bingo Blitz *Blitz's Tale* is layered into several areas of the app. For duplicate Collection items, players are awarded a wheel spin

Feature Explanation

- There are 8 stickers that must be collected 12 times. Stickers are collected by opening chests (earned by daubing a space with a chest on it), leveling up, receiving gifts, or making purchases (1)
- Upon room-load, choosing a *Boost Mode* increases the chances of receiving stickers during that round (2 & 3)
- Duplicate stickers may be used as gifts (4)
- Duplicate stickers may also award a spin of *The Magic Wheel* (5 & 6)

Additional Information

- [Blitz's Tale](#) 2/19/18
- [Jingle Blitz](#) 11/9/17
- KPI: Revenue
- Player motivations: Ownership, Value, Achievement

Related Features

- [SlotoCards](#) Slotomania
- [HOF Legends](#) House of Fun
- [Hat Collections](#) Angry Birds 2

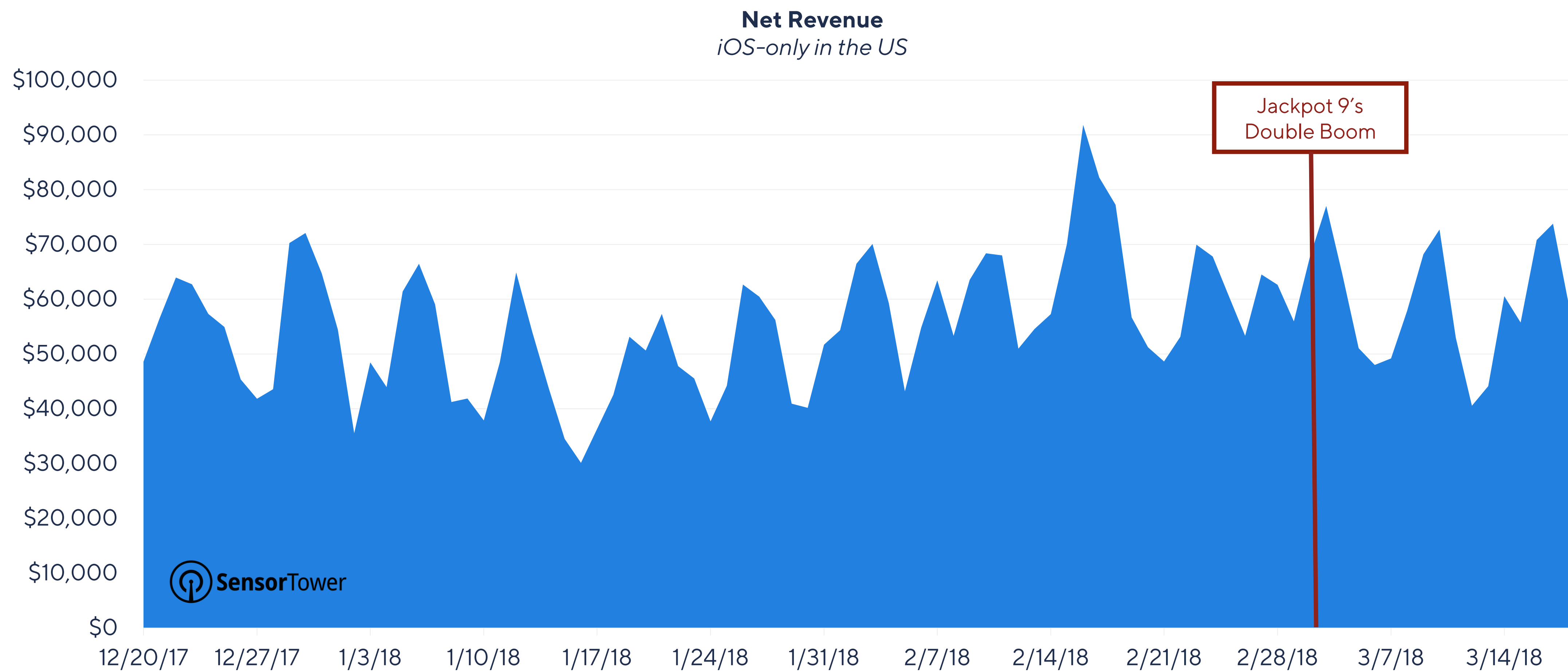
Key Takeaways

- Collection systems must be *deeply integrated* to drive sustained—and repeatable—revenue. See *Legends Collections* in the [Casino Report: January 2018](#) and *Collection Sets* in the [Puzzle Report: March 2018](#) as strong examples
- More complex and involved features (like this one) is becoming the norm. Look for more on this in the New Innovations analysis of *Collections with Storylines*
- Properly address the issue of awarding duplicate stickers. It can be handled several ways: Slotomania used [The Wheel of Stars](#) (fairly similar to the Bingo Blitz version) and House of Fun used *Bonus Chests* in [HOF Legend](#). Consider reskinning the same mechanic with something unique to your app



JACKPOT RAFFLES

Revenue spiked after the *Jackpot 9's Double Boom* event on 3/2/18. Revenue also rose a year ago during the initial release of the *Jackpot 9's Challenge* on 3/14/17 (this data is not shown below)



Revenue data comes from Sensor Tower

JACKPOT RAFFLES

POP! Slots *Jackpot 9's Double Boom* is an event with an additional raffle mechanic for heavy players to win a large, end-of-event jackpot

Feature Explanation

- The feature is marketed on app-entry (1)
- Collecting balloons fills a meter to trigger a spin on 1 of 5 jackpot machines (2)
- Once a jackpot machine is triggered, a 9 hitting spins the next reel. All other numbers hitting ends the spin and pays the displayed amount (3 & 4)
- *Double Boom* includes an additional raffle mechanic, awarding raffle tickets with any *Grand*, *Major*, and *Maxi* spin (5)
- At the end of the event, 100 winners (determined by a raffle) are awarded the highest *Jackpot 9* win (6)

Additional Information

- [Jackpot 9's Double Boom](#) 3/2/18
- [Jackpot 9's Challenge](#) 3/14/17
- KPI: Revenue
- Player motivations: Thrill, Value

Related Features

- [SupeRaffle](#) Slotomania
- [Ticket Tumbler](#) Hit it Rich

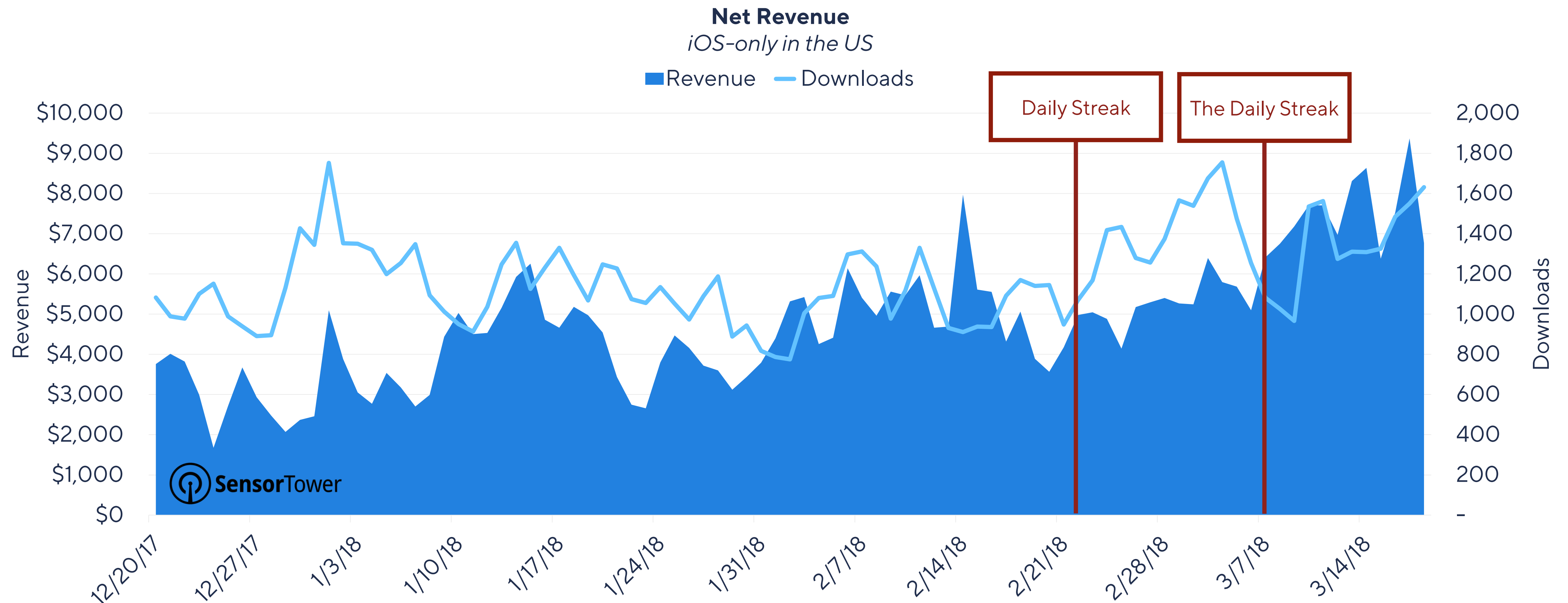
Key Takeaways

- Build mechanics that customize the potential payout based on player engagement
- Tack simple progression mechanics onto events so that heavily engaged players can win *potentially* massive awards at the completion of the feature
- Create simple jackpot machines that only appear as bonus features for events to decrease development time *and* make it easy for players to understand the payout system



DAILY STREAK EVENTS

Poker Heat revenue increased with the first free *Daily Streak* event ... and continued through *The Daily Streak* event (released shortly after). Some of this growth appears to be driven by an increase in downloads



Revenue and downloads data comes from Sensor Tower

DAILY STREAK EVENTS

In Poker Heat's *Daily Streak* events, retention bonuses increase on consecutive days. The event was re-released with a *purchase-to-unlock*

Feature Explanation

- The event boosts the recently released *Mega Bonus Wheel*. The retention bonus increases the payout with each consecutive visit (1)
- 10 hands played unlocks the bonus wheel (2)
- Players are notified at the table how many hands are left to unlock the wheel (3)
- In the second event, *The Daily Steak*, any purchase unlocks the streak feature of the *Mega Bonus Wheel*. This is clearly messaged to players on the buy page (4)

Additional Information

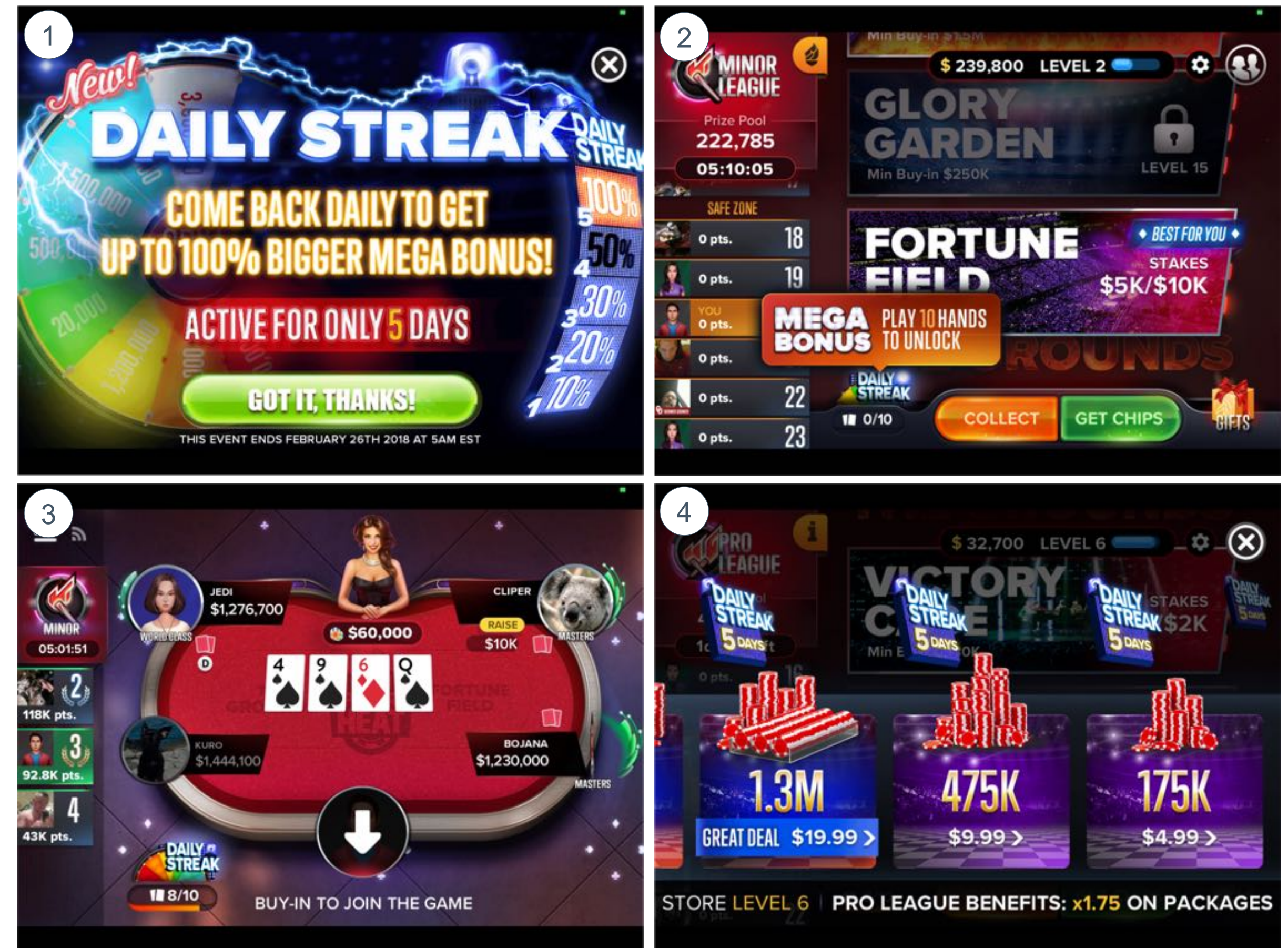
- [Daily Streak](#) 2/21/18
- [The Daily Streak](#) 3/6/18
- KPI: Retention, Revenue
- Player motivations: Ownership, Value

Related Features

- [Monthly Magic](#) Wizard of Oz
- [7 Day Login Bonus](#) WSOP

Key Takeaways

- Quickly re-release successful, newly released events with a *pay-to-unlock version* to monetize on players' desire to receive the feature
- Require players to *actually play* to earn a retention bonus
- Make the values of the wedges substantial. In this feature, Tier 1 values range from \$0.18 to \$3.54 for day 1 to \$0.32 to \$6.43 for day 5. And, the wedge values increase with each Tier

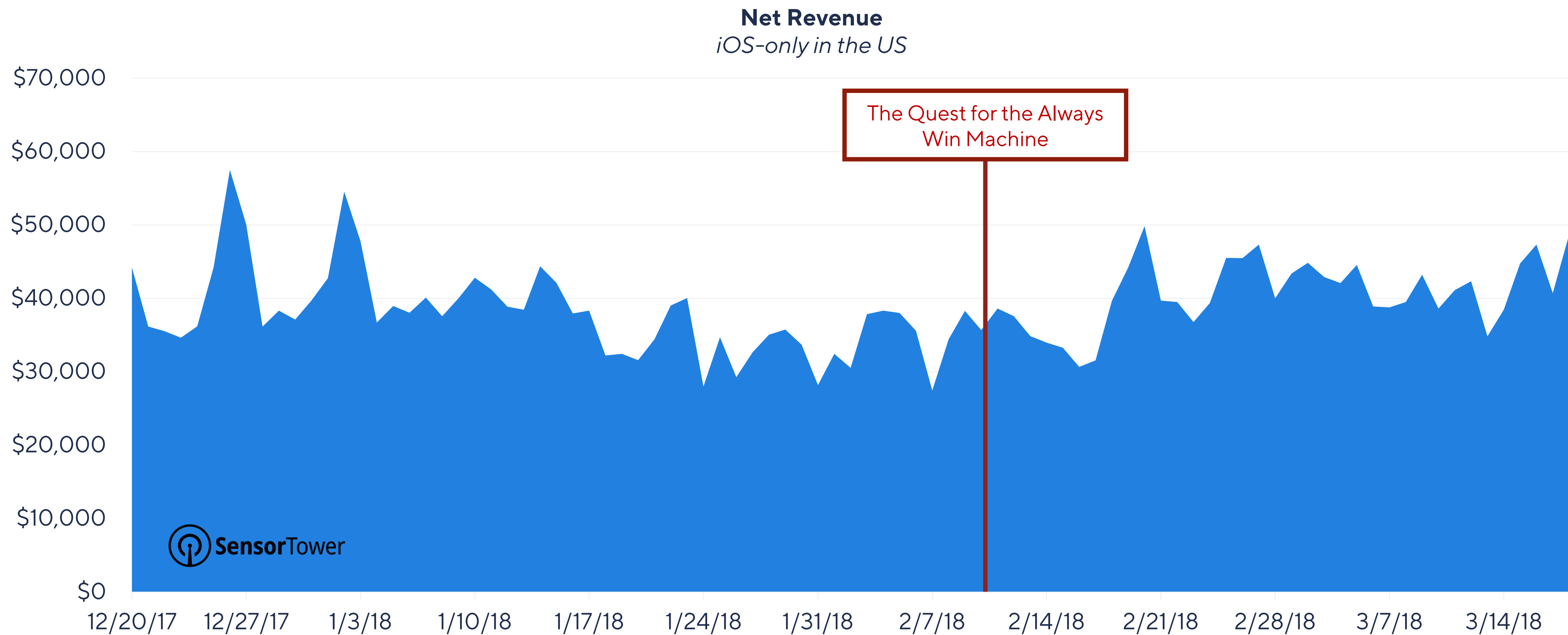


NEW INNOVATIONS

New product develops with retention and revenue upside

COLLECTIONS WITH STORYLINES

The revenue impact of *The Quest for the Always Win Machine* is unclear. Revenue remains flat for 6 days post-release before increasing on 2/18/18 and remaining elevated. Regardless of revenue impact, this is a highly involved feature with several new innovations to review



COLLECTIONS WITH STORYLINES

Caesars Slots *The Quest for the Always Win Machine* has an elaborate storyline, chests, bet-up mechanic, duplicate conversion system, and new daily bonus

Feature Explanation

- From the map, players collect parts of a stepper machine for coin rewards and daily spins (1)
- Players have access to information and various videos on the detailed storyline (2)
- A new button now appears in all machines, randomly awarding a *Sack*, *Silver Chest*, or *Gold Chest*, depending on bet level (3)
- Players collect chests by spinning, leveling, completing challenges, and qualifying purchases (4)
- Completing any of 15 Collection Sets awards the corresponding machine part, coin award, and a new video (5)
- When duplicate items are collected, players receive *Spare Stars*. 25 *Spare Stars* unlocks a *Star Converter* feature (6)
- Once a day, players may convert *Spare Stars* into a chest (7)
- Completing all Collection Sets and all machine parts awards a coin reward based on XP level ... and daily spins on *The Always Win Machine* (8)

Additional Information

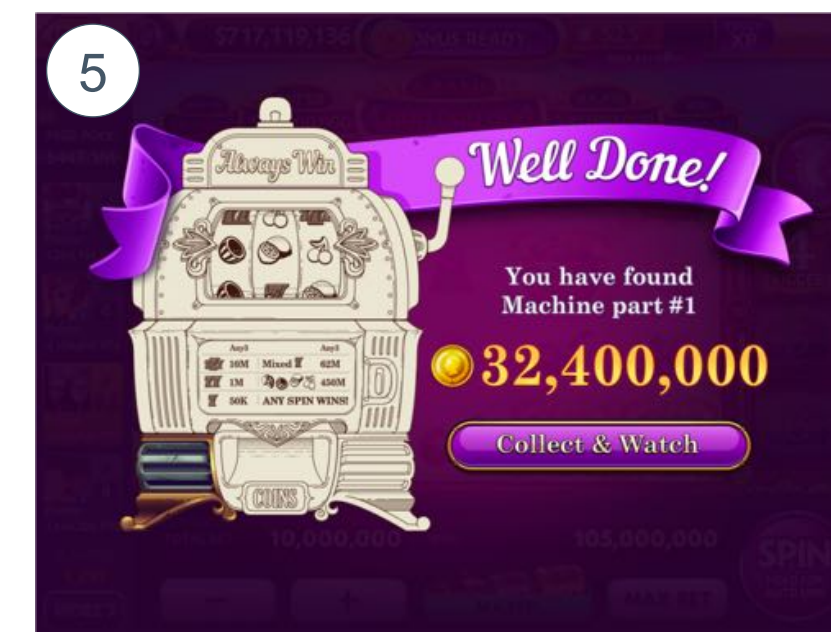
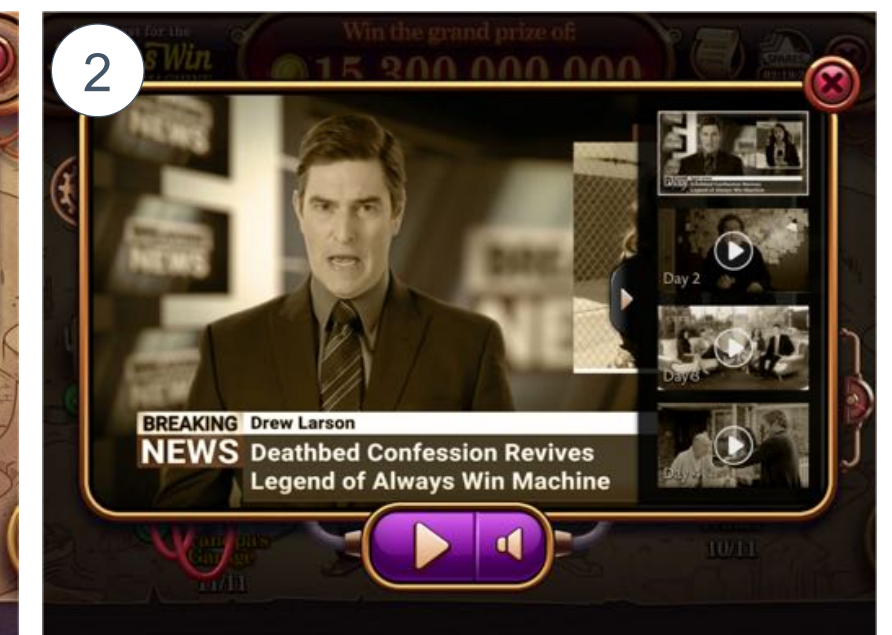
- [The Always Win Machine](#) 2/10/18
- KPI: Revenue
- Player motivations: Ownership, Value, Awe

Related Features

- [HOF Legends](#) House of Fun
- [SlotoCards](#) Slotomania
- [Blitz's Tale](#) Bingo Blitz

Key Takeaways

- Large, elaborate, and heavily-integrated features are now *the* way to delight players. Gone are the days when MVP versions of features, like simple Collection mechanics, differentiated apps to produce noticeable, sustained revenue bumps
- Videos in the [Feature Database](#) demonstrate the video-based storyline integrated into this feature. Social casino apps are about entertainment ... higher production value videos is a *new opportunity* for casino operators to capitalize on (see how Best Fiends uses [high production video and even actors](#) to differentiate and establish brand strength)



MARKET WATCH

2/15/18 - 3/14/18

NOTABLE FEATURES I

Evolutions of Collection Sets are appearing in several apps (both in Casino and Puzzle). Huuuge Casino released another iteration of *Insurance Deals*

App	Notable Release	More Information
Slotomania	Play.Set.Match	<ul style="list-style-type: none">Complete a <i>SlotoCard</i> Collection for a chance to receive a match of the prize (1)
	Great Power Up	<ul style="list-style-type: none">Purchase increases awards, bonuses, boosts, and features
Huuuge Casino	Insurance Deal	<ul style="list-style-type: none">Purchase to unlock timed payback (2)
myKONAMI Slots	KONAMI Connect	<ul style="list-style-type: none">Reward program tied to social and MGM casinos (3)
Wizard of Oz Slots	Lucky Cards 2nd Album	<ul style="list-style-type: none">Return of <i>Lucky Cards</i> and 2nd <i>Album</i> Collection



NOTABLE FEATURES II

Pokerist released slot machines. WSOP released new dealer characters. And, Big Fish Casino is investing in tournaments

App	Notable Release	More Information
Scatter Slots	More Beer Please	<ul style="list-style-type: none">Collect every 20 hours to fill a meter for rewards. Purchase to fill with coins and decrease meter time to 12 hours (1)
Pokerist	Slots	<ul style="list-style-type: none">3 slot machines added, including slot based quests and achievements (2)
WSOP	New Dealer Team	<ul style="list-style-type: none">New <i>Pro Dealer</i> character (3)
Big Fish Casino	Reel Rivals	<ul style="list-style-type: none">Coming soon: Tournament-based feature
Gold Fish Casino	Mermaid's Cove	<ul style="list-style-type: none">Coming soon: Potentially challenge-based feature

[Click here](#) to go online for the full list of content released this month with links to more images and videos in the [Feature Database](#)



APPENDIX

PLAYER MOTIVATIONS



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 framework](#)

To create new innovations, focus on the emotional jobs that people want 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. This is, and likely always will be, a work in progress. So please feel free to email me at brett.nowak@liquidandgrit.com for suggestions or comments.

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

DATA COLLECTION PROCESS



Recommendations, information, and data comes from market research, app intelligence tools, and deep analyses 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

“We keep moving forward, opening new doors, and doing new things, because we're curious and curiosity keeps leading us down new paths.”

– Walt Disney

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