LIQUID&GRIT

Casino Report

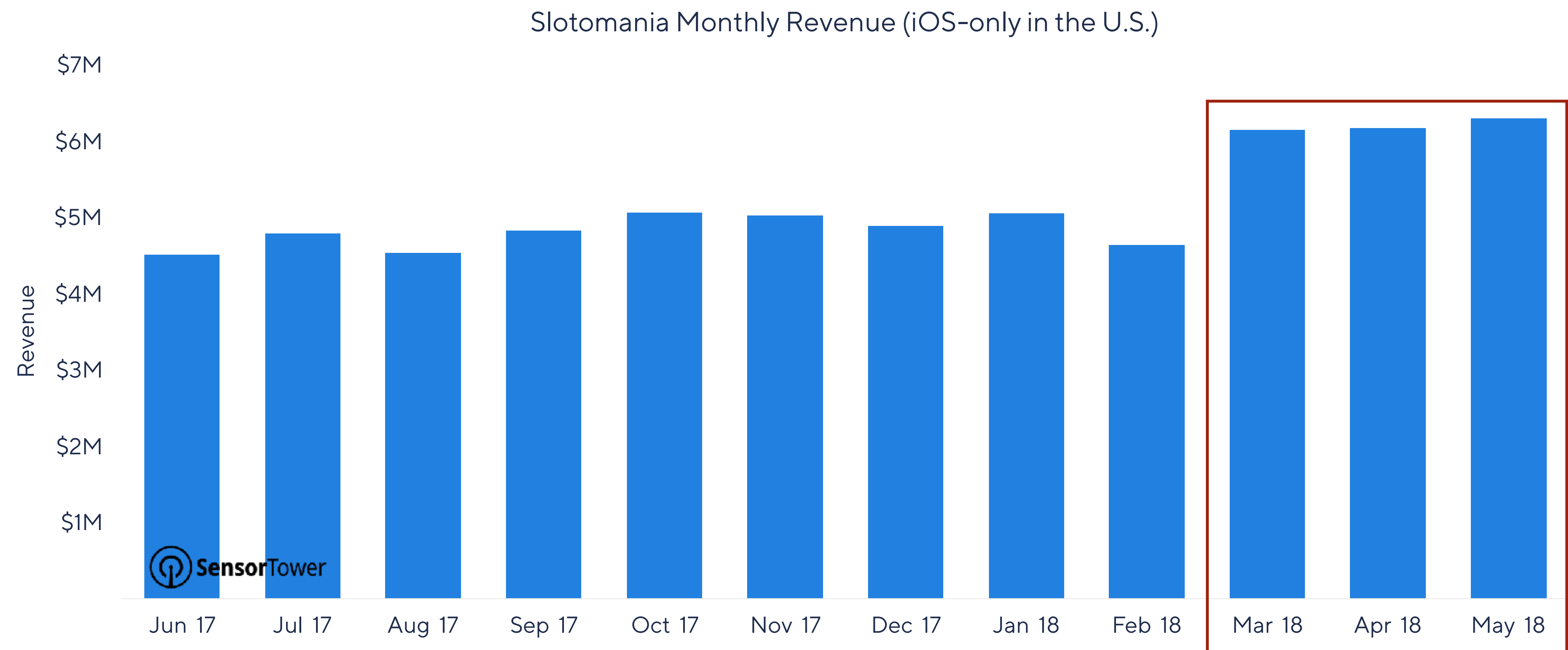Competitive Research and Actionable Product Recommendations

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JUNE

2018

STRATEGY INSIGHTS

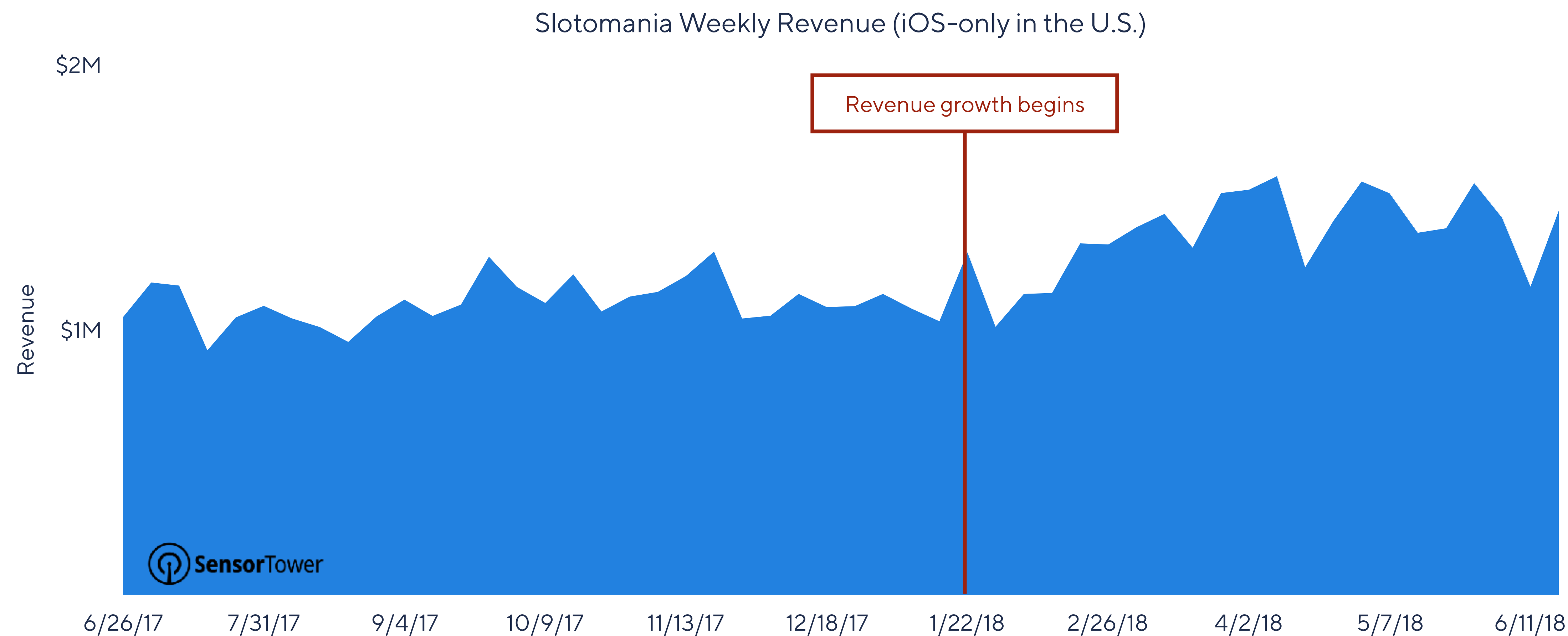# SLOTOMANIA REVENUE GROWTH

Slotomania revenue increased by 33% MoM from $4.6M in February to $6.1M in March. Revenue remained elevated throughout April and May

Slotomania Monthly Revenue (iOS-only in the U.S.)

SLOTOMANIA REVENUE GROWTH

Revenue growth kicked off in late-January and continued through mid-April

Slotomania Weekly Revenue (iOS-only in the U.S.)

Revenue growth begins

$2M

$1M

Revenue

6/26/17 | 7/31/17 | 9/4/17 | 10/9/17 | 11/13/17 | 12/18/17 | 1/22/18 | 2/26/18 | 4/2/18 | 5/7/18 | 6/11/18

SensorTower

SLOTOMANIA (CONT.)

Revenue growth was driven by stacking features and events with complimentary sales (often including choice-based awards)

Stacking Features and Events with Sales Examples

- *SlotoCard Clearout* sale released with *SlotoQuest* event a week before a collection album closed. In the event, *SlotoCards* were given as prizes (1 & 2)
- *Snakes & Ladders Royale* paired with *Ready Set Go* boost event, where completed *SlotoCard* sets paid x2 on the last day of the *SlotoCard* album (3 & 4)
- *SlotoQuest Hollywood* released with *The Great Power Up* event: coin packages were paid 4x and nearly all revenue features were boosted (5 & 6)
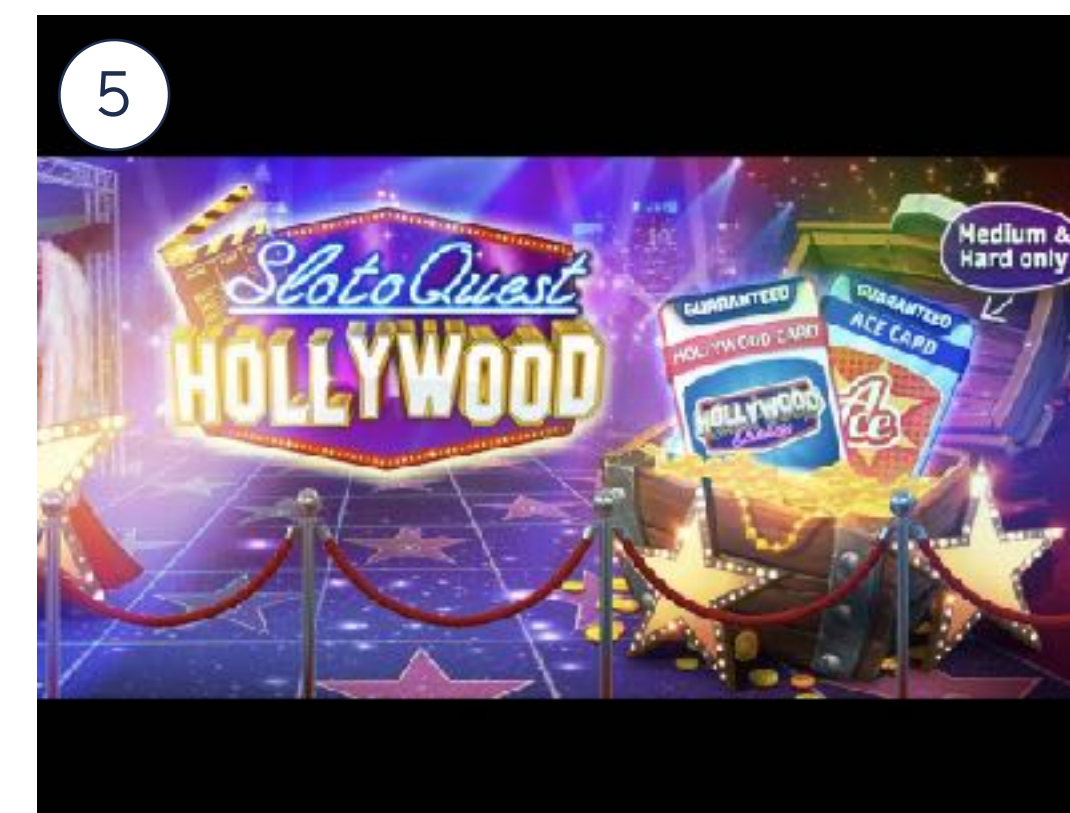
SLOTOMANIA REVENUE GROWTH

Most of the biggest revenue-driving features from January to March helped players complete *SlotoCard* sets. Features that increased revenue without a direct connection to *SlotoCards* include: *SupeRaffle, Benefit Box, Spinner Winner, Stamp It x2,* and *Juicy Sevens*

Date Range	Duration (in Days)	Avg. Daily Revenue	Avg. WoW Revenue	Avg. Wo2W Revenue	Feature
1/23/18 - 1/26/18	4	$196,023	46%	24%	SlotoCard Clearout Sale
2/8/18 - 2/14/18	7	$183,323	41%	11%	SupeRaffle
2/22/18 - 2/25/18	4	$208,316	36%	15%	Snakes & Ladders Royale
3/2/18 - 3/4/18	3	$225,057	12%	48%	The Great Power Up
3/5/18 - 3/14/18	10	$197,440	2%	6%	Benefit Box
3/7/18 - 3/8/18	2	$207,325	13%	-4%	Play. Set. Match.
3/15/18	1	$220,141	4%	-1%	SlotoQuest: Penthouse Party
3/16/18	1	$234,992	27%	4%	Spinner Winner
3/21/18	1	$212,351	14%	0%	Stamp It x2
3/22/18	1	$228,340	4%	12%	Perks Plus
3/23/18	1	$201,634	-14%	21%	Juicy Sevens
3/28/18	1	$230,276	8%	5%	Status Boost
3/29/18	1	$242,062	6%	3%	Ready Set Go

Revenue data and dates from Sensor Tower

HUUUGE PUBLISHING

Huuuge Games unveiled Tap Tap Games ... a new publishing arm for hyper-casual gaming. This is currently monetizing from ads and could generate installs to feed their casino titles
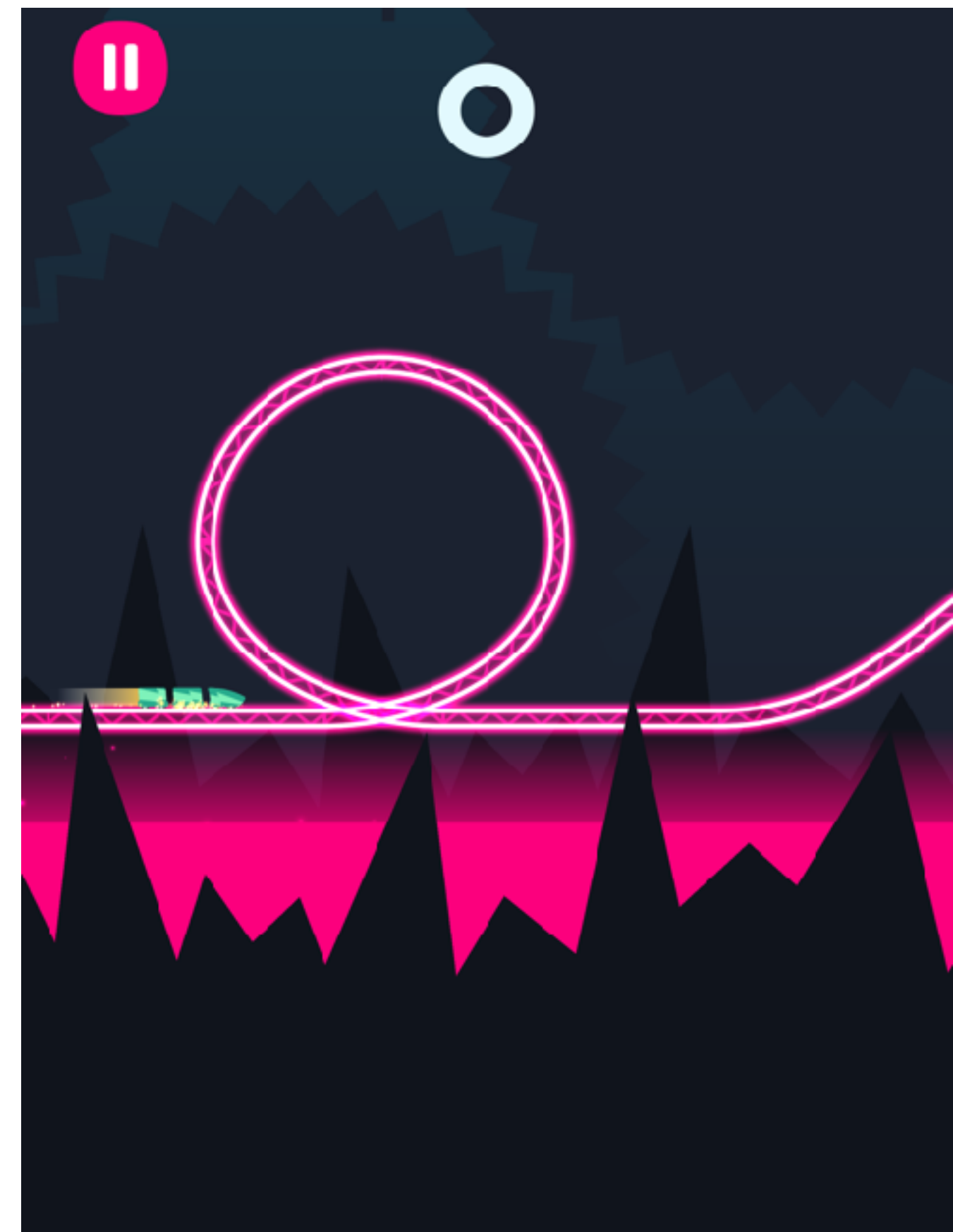
REVENUE DRIVER
EVENTS WITH PURCHASE SWEETENERS

FEATURE SNAPSHOT

POP! Slots released a 3-day event *Win Win Challenge* with machine-specific challenges, daily rewards, *Mystery Prizes,* and *Scratcher Cards*

Detailed Information

- Release: 5/31/18
- KPI: Revenue
- Player Motivations: Thrill, Ownership, and Achievement
- Player Types: Stealthy Steve, Friendly Fran, Adventuring Adrian, and Prospecting Polly

Report References

- *Post-Round Mini-Games* in the April 2018 Social Casino Report
- *Purchase Options* in the December 2017 Social Casino Report

Related Features

- April Quests – Scatter Slots
- Cake Day Bash – Hit it Rich!
- Jackpot Calendar – Jackpot Party Casino

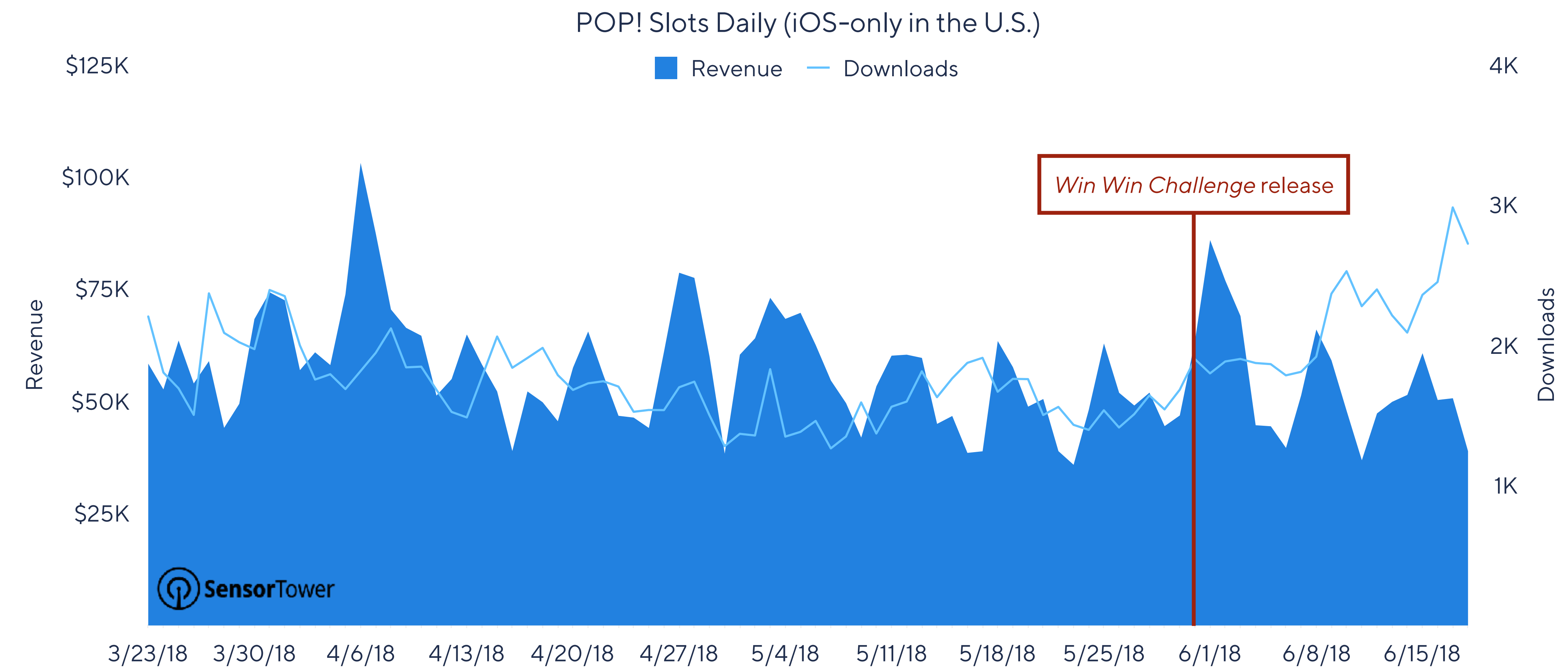Click here for more images of *Win Win Challenge*

Impact	▰▰▰▰▰
Longevity	▰▰▱▱▱
Repeatability	▰▰▰▱▱
Skinnability	▰▰▰▰▱
Cost	▰▰▱▱▱

IMPACT ANALYSIS

The 3-day *Win Win Challenge* release increased POP! Slots' revenue by 58% 3Do3D, 19% WoW, and 14% 2Wo2W

POP! Slots Daily (iOS-only in the U.S.)

■ Revenue — Downloads

Win Win Challenge release

SensorTower

Revenue axis: $125K, $100K, $75K, $50K, $25K

Downloads axis: 4K, 3K, 2K, 1K

Dates: 3/23/18, 3/30/18, 4/6/18, 4/13/18, 4/20/18, 4/27/18, 5/4/18, 5/11/18, 5/18/18, 5/25/18, 6/1/18, 6/8/18, 6/15/18

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PRODUCT INSIGHTS

Evolve *Event Calendars* with multiple events per day and extended completion bonuses. Then, boost revenue by increasing buy page conversions with a post-purchase sweetener

Feature Details

- Upon app-entry, a 3-day event is marketed to players (1)
- An icon with a countdown timer is added to the app (2)
- Each day, players attempt machine-specific challenges to win a *Huge Mystery Prize* (3)
- The challenges are specific wins on designated machines (4)
- Completing all 3 missions awards an extra 100 million coins (5)
- During the event, select in-store purchases include a *Scratcher Card* that adjusts wins based on package size (6)

Key Takeaways

- Keep players engaged by *advancing* with more elaborate *Event Calendars*:
  1. Release multi-day events that award larger prizes if fully completed
  2. Layer multiple events on the same day (e.g., a challenge system with a post-purchase mini-game). Candy Crush Saga often releases 5 events on a single day
- Post-purchase sweeteners will spike revenue … but need frequent updates. Pair a new post-purchase sweetener with a new challenge event to help players *justify a purchase* with a fun and thrilling mini-game

RETENTION BOOSTER
LOTTERY RETENTION SYSTEMS

FEATURE SNAPSHOT

DoubleU Casino released a *Lottery System* with both a large jackpot *and* wins that hit more frequently. Players are awarded *Lottery Tickets* upon entering the app each day

Detailed Information

- Release: 5/17/18
- KPI: Retention and Revenue
- Player Motivations: Thrill and Ownership
- Player Types: All

Report References

- The Huuuge Casino version of this feature is revenue-based and more deeply integrated into the app. If you are considering this feature, review *Lottery Systems* in the April 2018 Casino Report

Related Features

- Lottery – Huuuge Casino
- SupeRaffle – Slotomania
- Ticket Tumbler – Hit it Rich!

Click here for more images and videos of *Billionaire Lotto*

Impact	▰	▰	▰	▱	▱
Longevity	▰	▰	▰	▰	▱
Repeatability	▰	▰	▰	▰	▱
Skinnability	▰	▰	▱	▱	▱
Cost	▰	▰	▰	▰	▱
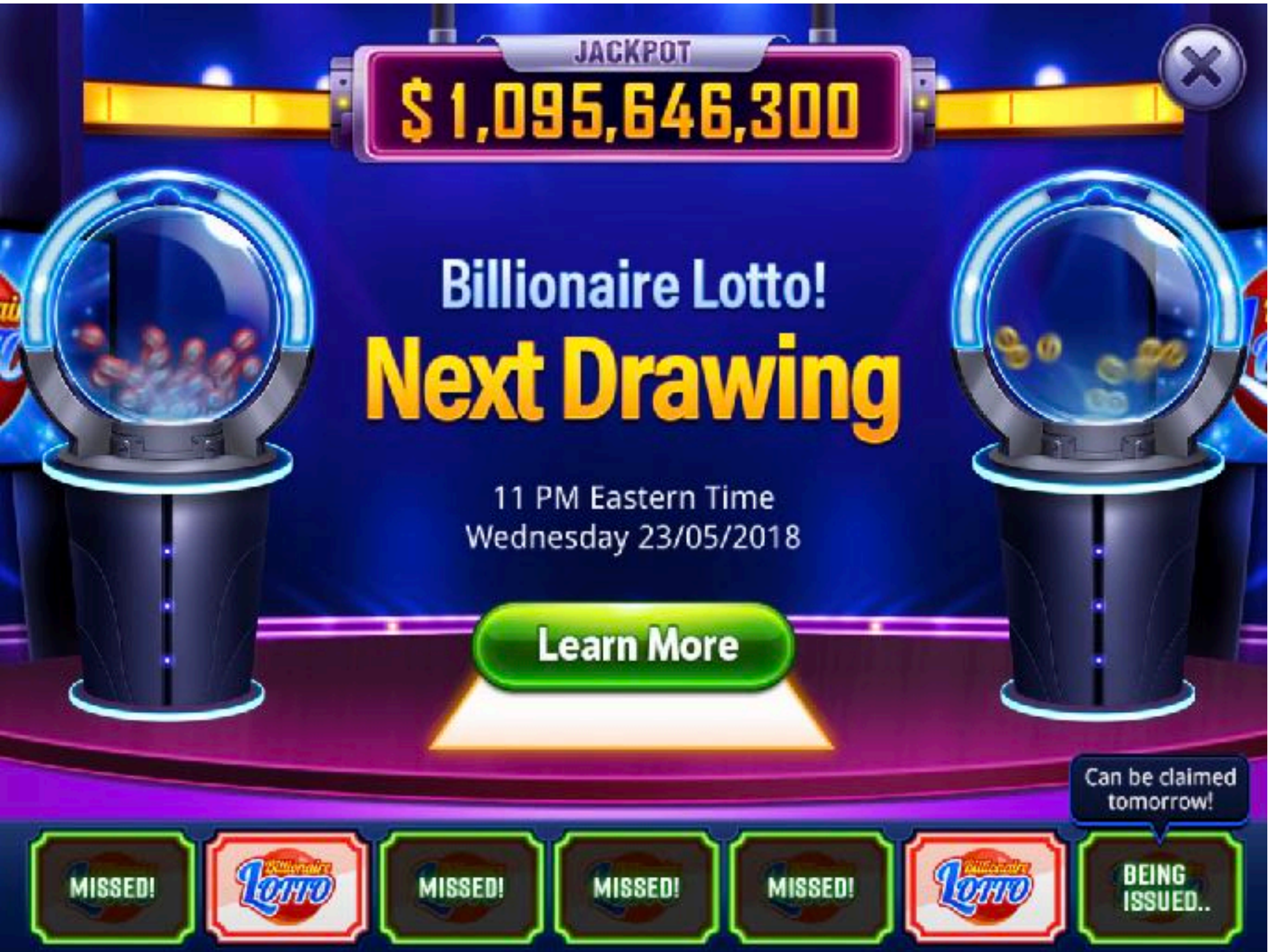
IMPACT ANALYSIS

Following the release of *Billionaire Lotto,* DoubleU Casino revenue was down 13% WoW ... but up 5% 2Wo2W and 4% 3Wo3W

DoubleU Casino Daily (iOS-only in the U.S.)

Billionaire Lotto release
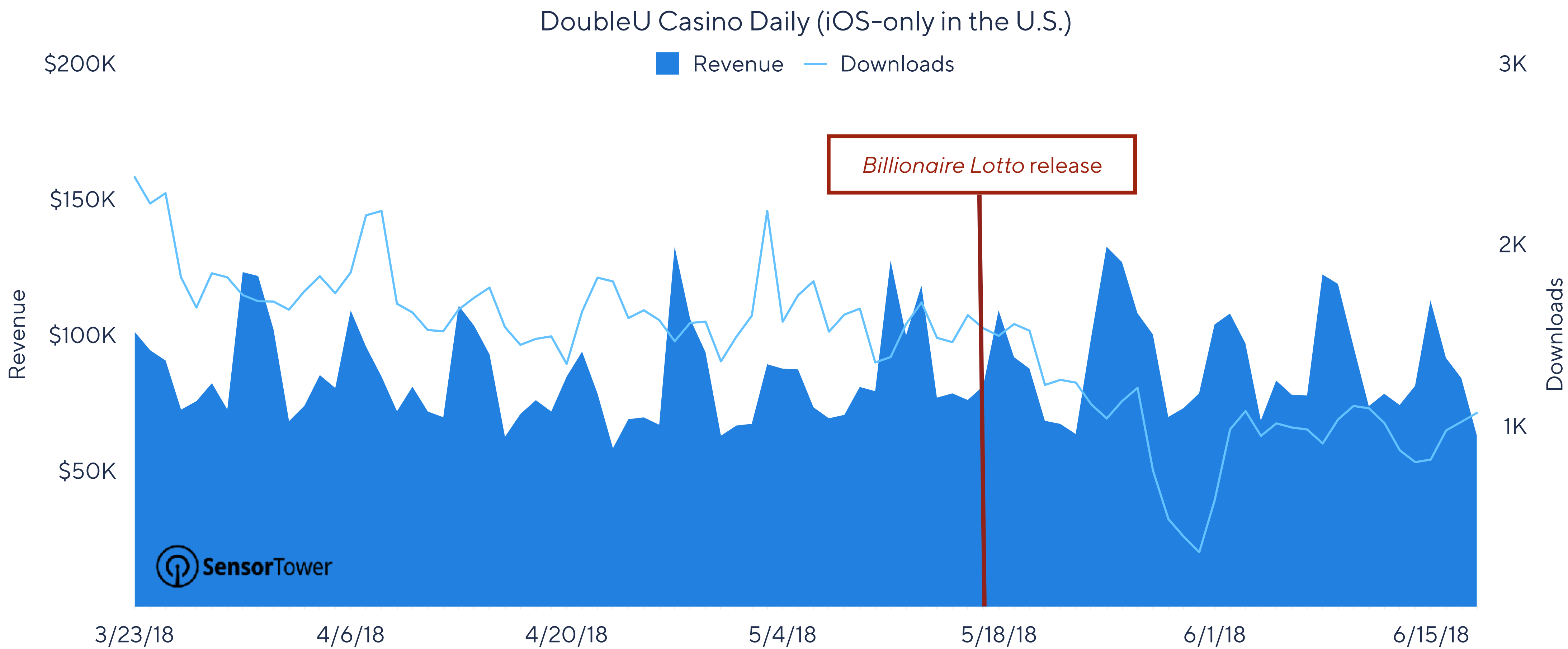
PRODUCT INSIGHTS

Lottery Systems drive player behavior. The key is to integrate the system with positive reinforcement and promote the most valuable behavior. Keep players engaged each week with attainable wins and massive jackpots

Feature Details

- At app-entry, players are introduced to a new *Lottery* feature (1)
- Players are awarded 1 *Lottery Ticket* each day they log in (2)
- Players can access the *Lottery Screen* via the *Collect Gifts* tab (3)
- The *Lottery Screen* displays awarded tickets, unclaimed ticket placeholders, and a countdown timer displaying the time until the next drawing (4)
- The *Lottery* has 9 levels of rewards, depending on the numbers hit (5)
- After a drawing, players can see how many people won each reward level (6)

Key Takeaways

- *Lottery Systems* can be used to drive both retention and revenue, depending on the implementation. DoubleU Casino utilizes a *Lottery Retention System,* whereas Huuuge Casino's *Lottery System* concentrates more on revenue
- Build a payout system that feels both *attainable* with smaller wins and *exciting* with larger wins. Then, showcase this information to players regularly
- Draw upon the mechanics, themes, and designs from the most popular lotteries in America: Powerball and Mega Millions
- Include a jackpot that rarely hits. When it does hit, consider showing a news-like story (such as, "Breaking News") about players who win the jackpot

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ECONOMY ANALYSIS

UPDATED ECONOMY SPREADSHEET

For a full breakdown of the new user economies in the top 50 grossing casino apps, download the *updated* Social Casino Economy spreadsheet. In cell C5 of the *Outputs* tab, change the number of hours played each day to understand how each economy adjusts based on player engagement

Daily Free Value
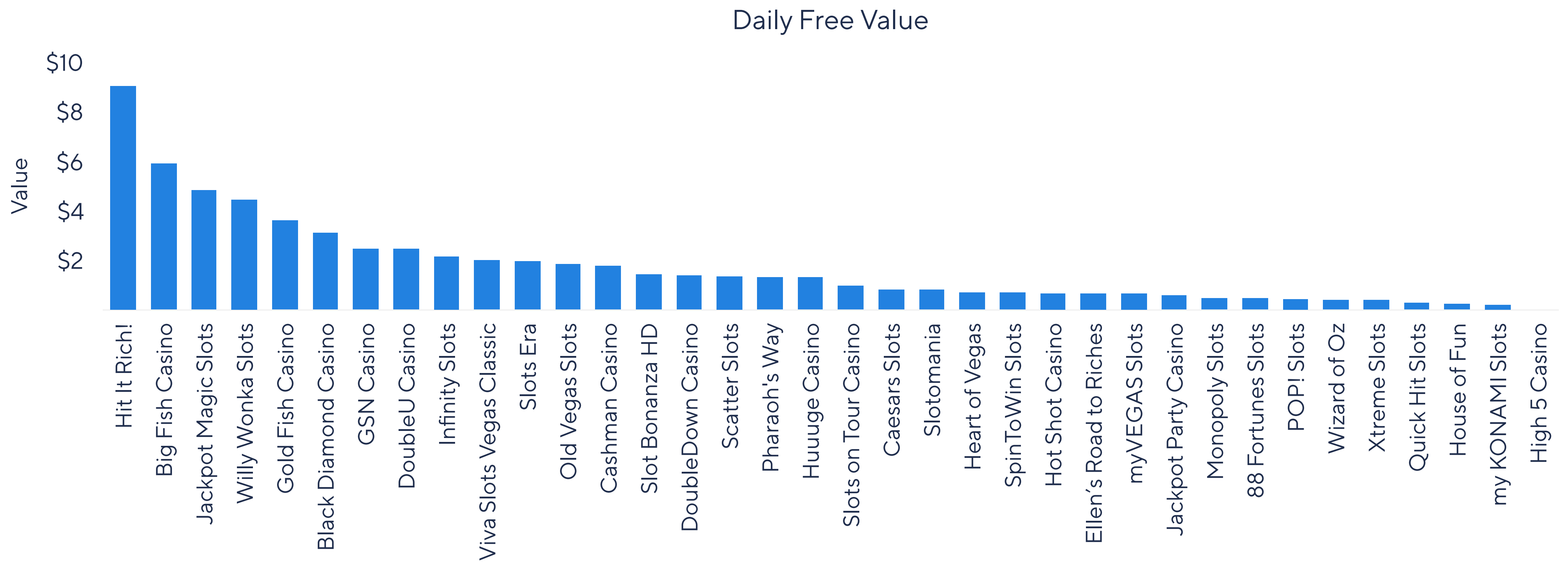

Download the Social Casino Economy spreadsheet

Read the full Casino Economy Analysis

MARKET WATCH

5/15/18 – 6/14/18

NOTABLE FEATURES I

Game	Name	Description
Slotomania	Your Feedback Matters	In-app dialogue directs players to a survey that concentrates on real-world prizes (1)
	Candy Blast	Players spin to collect symbols to fill a meter, unlocking a pick' em mini-game
House of Fun	Mission of the Day	A daily quest system
Bingo Blitz	Garden Bloomer and Treehouse Blitz	Players daub in any room to collect symbols to complete quests (2)
Caesars Slots	Showroom	New *Showroom* displays sortable categories of achievements (3)
Jackpot Party Casino	Power Pack	Boosts are awarded to players the day after they make a purchase
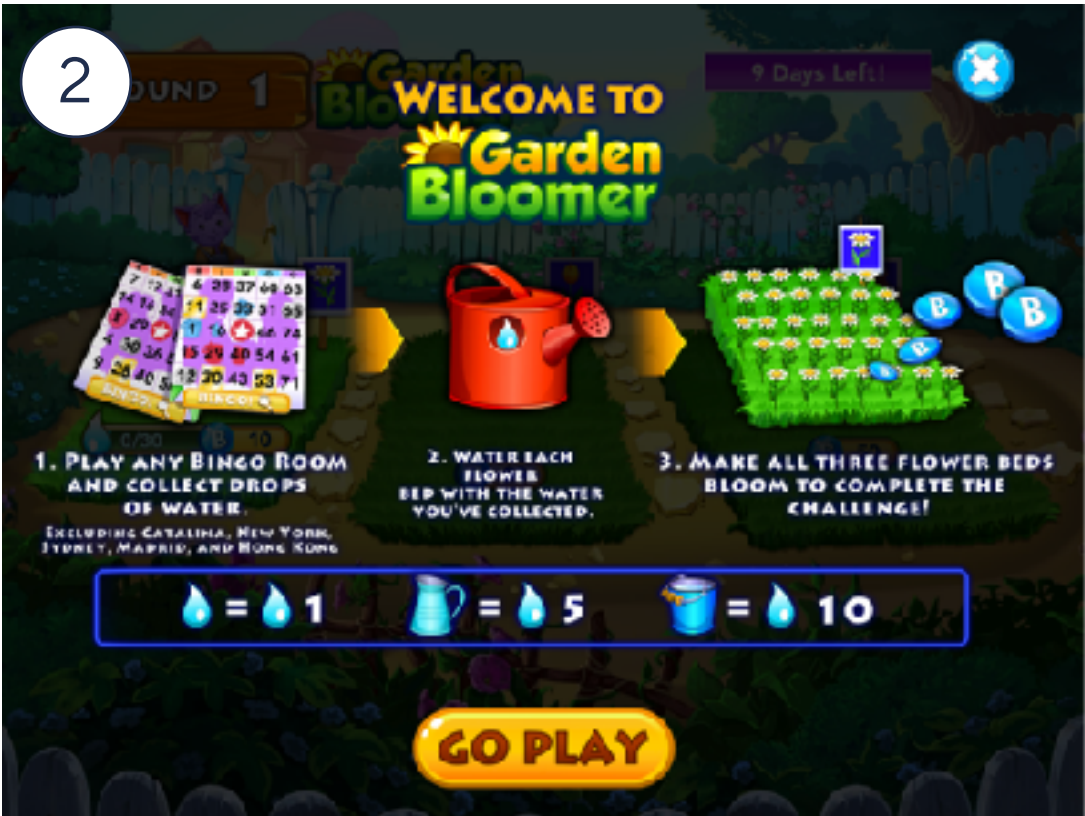
NOTABLE FEATURES II

Game	Name	Description
Zynga Poker Texas Holdem	Jackpots	An in-room icon displays a *Jackpot List* for various rooms and allows players to visit them via the list (1)
Hit it Rich!	Trophy Rank Tiers	Trophy update with a tiered system based on trophy collection. The feature is linked across Zynga apps through the *Loyalty Lounge*
Wizard of Oz Slots	Trophy Rank Tiers	Same feature as in Hit it Rich!
my KONAMI Slots	Tournaments	Tournament room added with various timed events in different machines
Classic Vegas Casino	Carnival	Mini-game feature with spin to unlock and puzzle mechanics
Quick Hit Slots	Tetris Super Jackpots	*Tetris*-based spin to collect mini-game event with themed feature slot released. The mini-game has a skill-centric *Tetris* mechanic (2)
Slots Era	ERA Collection Event	Re-skin of *Party Event* collection event that rewards points for spins, purchases, leveling-up, and claiming bonuses (3)

Click here for the full list of content released this month

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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

To create new innovations, focus on the emotional jobs that people want to 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.

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

PLAYER PERSONAS

	Stealthy Steve	Friendly Fran	Destructive Derek	Adventuring Adrian	Prospecting Polly	Daring Dan	Gathering Grace
Gender	76% male	72% female	73% male	55% male	78% female	69% male	71% female
Mean age	31.6	40.8	37.8	31.5	42.3	39.6	45.3
Highest preference(s)	Assault	Care and Manage	Manage	Journey	Journey and Coordinate	Assault and Coordinate	Coordinate
Lowest preference(s)	Care	Assault	Care	Manage and Care	Assault and Care	Journey and Care	All except Coordinate
Gameplay mechanic LIKES	Stealth, strategy, being the protagonist, skill progression, and exploration	Befriending non-playable characters (NPCs), creating an avatar, skill progression, and city or village handling	Strategy, city or base construction, and large-scale handling of NPCs	Creating an avatar, skill progression, being the protagonist, exploration and secrets, and befriending NPCs	Collecting rare items and treasures, exploration, skill progression, and tile matching	Racing, explosions, and stealth	Tile matching, platforming, and collecting rare items
Gameplay mechanic DISLIKES	Rhythm mechanics and pet training	Killing, war, weaponry, and explosions	Theft, illegal activities, stealth, retreating, and rhythm mechanics	Racing, sports, tile matching, instruments, dancing, and pet training	Theft, explosions, and retreating	No strong dislike for any particular mechanic	Killing, theft, destruction, and war

DATA COLLECTION PROCESS

Recommendations, information, and data come from market research, app intelligence tools, and deep analysis 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

"Innovation distinguishes between a leader and a follower."

– Steve Jobs

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