



LIQUID & GRIT

Casino Report

Competitive Research and Actionable Product Recommendations

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JULY

2018

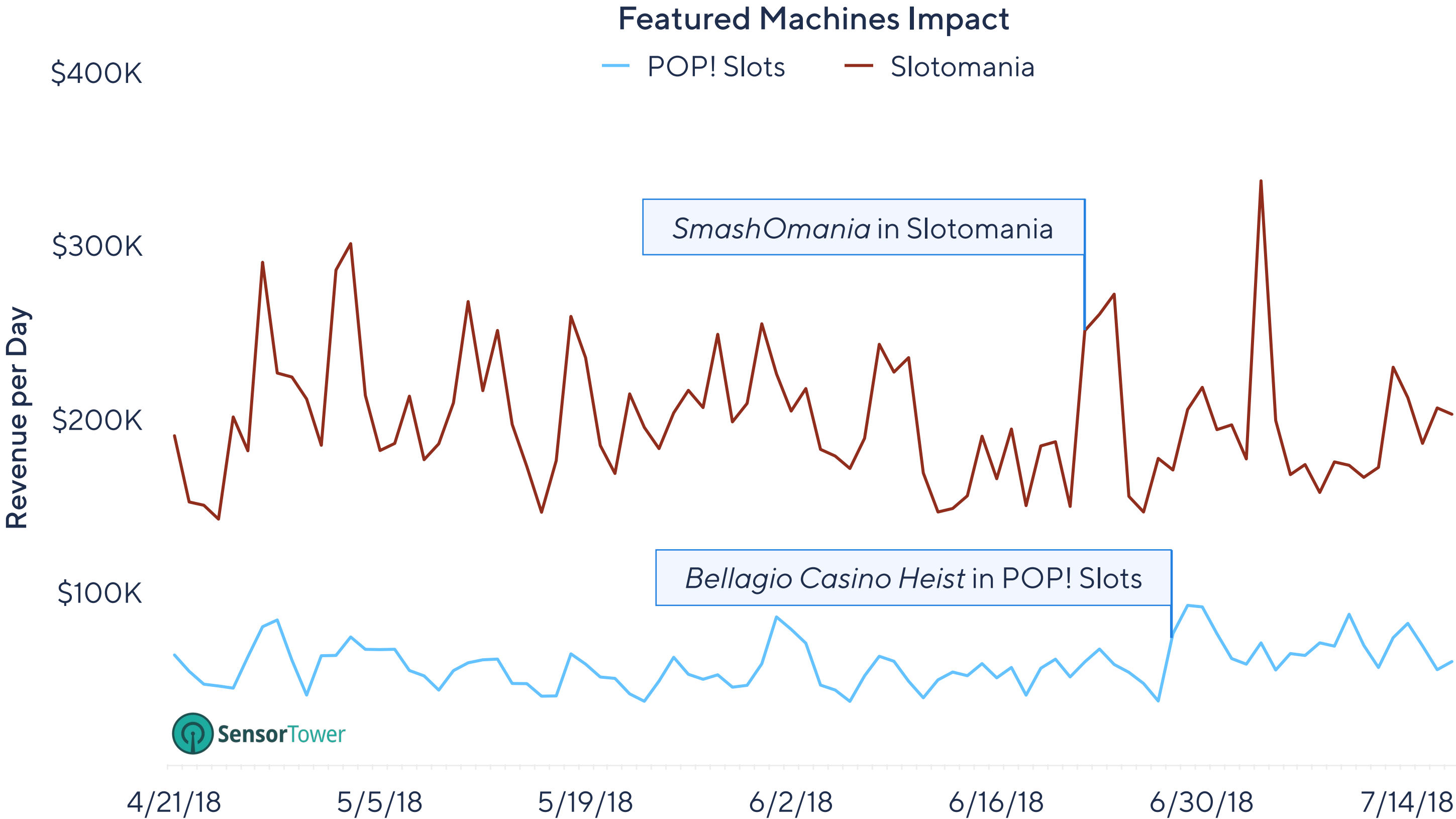
STRATEGY INSIGHTS



FEATURED MACHINES IMPACT

Featured slots machines continue to be a major revenue-driving component of growing apps. Featured machines led to revenue bumps in POP! Slots (41% WoW) and Slotomania (17% WoW)

POP! Slots released *Bellagio Casino Heist*, a machine with social bonus mechanics and an early access feature. Slotomania released events around featured machine *SmashOmania* in order to boost revenue and sink coins. Review the [July 2018 Slots Design Report](#) for an analysis of both machines. If you are not a Slots Design Report subscriber, [contact us for a sample report](#)



Time Period	POP! Slots	Slotomania
WoW	▲ 41%	▲ 17%
Wo2W	▲ 40%	▲ 8%
Wo3W	▲ 44%	▲ 5%

POP! Slots

- 6/28: the [Bellagio Casino Heist](#) machine released with a social bonus mechanic

Slotomania

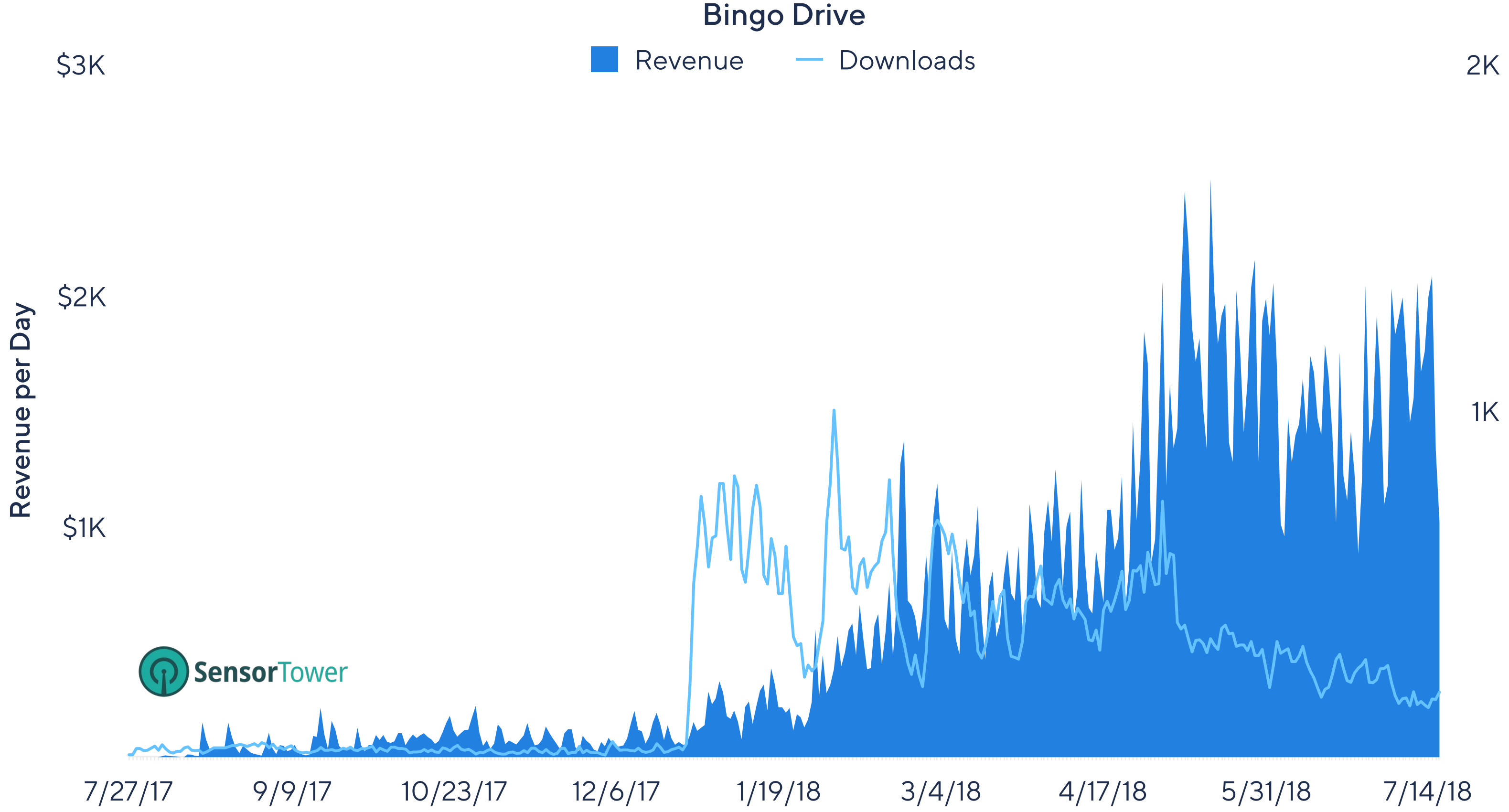
- 6/21 - 6/24: [Spring Blast](#) event released
- 6/22: [SmashOmania](#) machine released
- 6/23 - 6/24: AceCard featured machine *SmashOmania*
- 6/24: *Double Dash* released ([Daily Dash](#) and *Spring Blast* prizes doubled)

Graph data is iOS-only in the U.S.

NEW APP: BINGO DRIVE

Bingo Drive by Gliding Deer is a breakout, male-oriented app that combines Bingo gameplay with car-building mechanics

Bingo players unlock custom-designed cars and accessories (1). Players can personalize their entire car as well as their in-game character's suit (2)



- Additional Features**
- [New User Flow](#)
 - [Car Shop](#)
 - [Collections](#)
 - [Achievements](#)
 - [Daily Spin](#)
 - [Inbox](#)
 - [Profile](#)
 - [Spin the Wheel](#)
 - [Trophies](#)
 - [Weekend Saga](#)

[Download the Social Casino Economy spreadsheet](#)

Graph data is iOS-only in the U.S.

REVENUE DRIVERS



CUSTOMIZED COLLECTION SETS

FEATURE SNAPSHOT

Bingo Showdown released a collection event, *Wanted*, that added a progression map and competitive leaderboard to an already-released *Puzzle* feature

Detailed Information

- Release: 5/10/18 *Puzzle* feature, 6/25/18 *Wanted* event
- Player Motivations: Achieve, Ownership
- Player Personas: Gathering Grace, Prospecting Polly

Report References

- *Collection Sets* in the [March 2018 Casino Report](#)
- *Legends Collection* in the [January 2018 Casino Report](#)

Related Features

- [Blitzzy's Tale](#) - Bingo Blitz
- [HOF Legends](#) - House of Fun
- [Top Challengers](#) - Wonka Slots

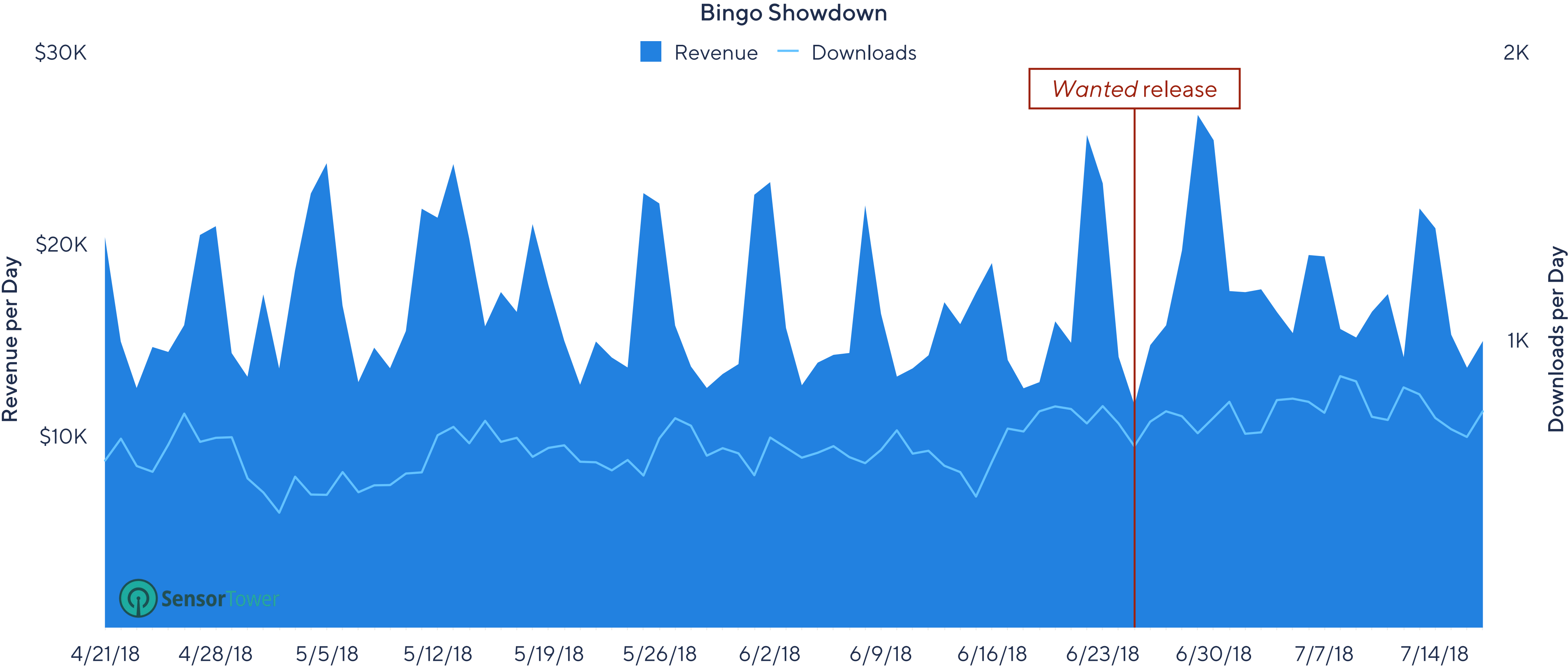
[Click here for more images and videos of Wanted](#)



IMPACT ANALYSIS

The *Wanted* collection event drove a sustained 10% increase in revenue for Bingo Showdown

Time Period	Impact
WoW	▲ 10%
2Wo2W	▲ 10%
3Wo3W	▲ 12%



Graph data is iOS-only in the U.S.

INSIGHTS & ADVICE

Augment *Collection Set* events to best satisfy your players' motivations. Be transparent about mystery rewards for healthy long-term revenue

Feature Details

- Upon app-entry, players see a *Wanted* lobby card poster (1)
- Opening the *Wanted* card displays more *Outlaw* information, puzzle difficulty, and time left for completion (2)
- Clicking the *Map* icon opens a map showing all the collectable *Outlaws* and each character's progression (3)
- At the end of the *Map Book*, players can see the *Outlaw Families* (4)
- Completing an *Outlaw Family* rewards a *Chest* with an unknown prize (5)
- Players must collect *Puzzle Pieces* by winning Bingo cards (6)
- The *Top Star* icon opens a *Star Leaders* leaderboard, which is based on the number of *Stars* collected by players during a 30-day period (7)
- A *Star* is awarded for every Bingo won (8)

Key Takeaways

- Adjust your *Collection Sets* (now a proven mechanic in Puzzle and Casino) to fit player motivations (see [Appendix](#) for player motivations details). For instance, *Bingo Showdown* wisely added a competitive leaderboard mechanic, given the more competitive nature of Bingo players
- Consider how players will collect characters. *Bingo Showdown* players receive *Outlaws* by winning puzzle pieces through Bingos. This is very straightforward and players feel in-control. In House of Fun's [HOF Legends](#), the developer has more control. Players are awarded *Chests* in a 'gotcha-like' fashion
- To maintain long-term app health, properly inform players of the payout systems. In the [Incredibles 2 Survival Event](#), which drove a 99% WoW bump in revenue for Disney Emoji Blitz, players are shown the draw rate of each item in a reward *Box/Chest*



TOTAL SPEND METERS

FEATURE SNAPSHOT

Mega Hit Poker, a new top-grossing app in the Casino category, released a revenue event *Cashback Extravaganza* that rewards total spend over a certain period

Detailed Information

- Release: 6/25/18
- Player Motivations: Ownership, Thrill
- Player Personas: All

Report References

- *Payback Mechanics* in the [July 2017 Casino Report](#)
- *Surprise & Delight* in the [January 2018 Casino Report](#)

Related Features

- [Doughnut Day Sale](#) - Infinity Slots
- [Payback Deluxe](#) - Slotomania
- [Insurance Day](#) - Huuuge Casino

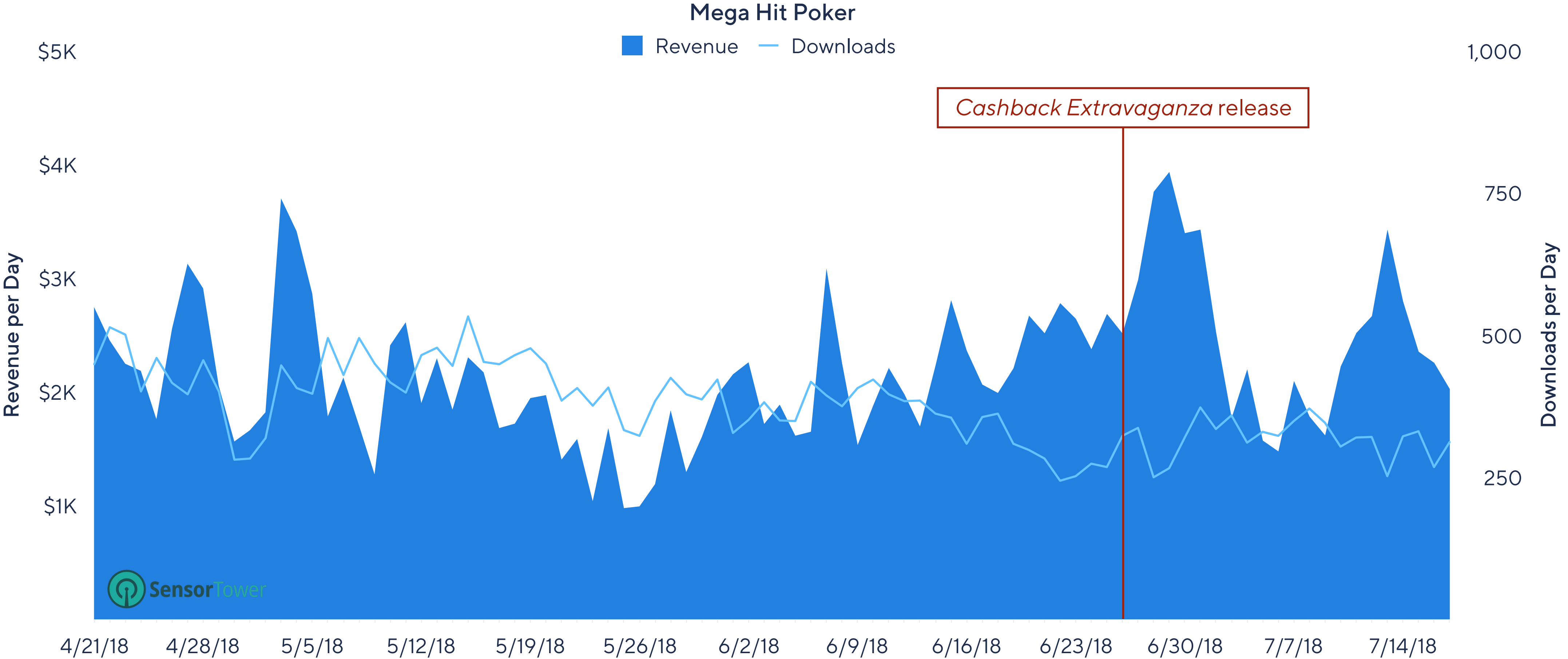
[Click here for more images and videos of Cashback Extravaganza](#)



IMPACT ANALYSIS

Cashback Extravaganza drove a 32% WoW bump in revenue for Mega Hit Poker (likely a more pronounced impact since Mega Hit Poker is a newer app)

Time Period	Impact
WoW	▲ 32%
2Wo2W	▲ 11%
3Wo3W	▲ 6%



Graph data is iOS-only in the U.S.

INSIGHTS & ADVICE

Build events around total spend, a trending mechanic with more upside. Combine clear incentives with thrilling potential boosts to increase transactions

Feature Details

- At app-entry, players see the *Cashback Extravaganza* event with a countdown timer (along with many other deals in the lobby) (1)
- Making a purchase fills the *Cashback Extravaganza* meter and the chip reward increases (2)
- Players can either 'Cash In Now' or continue to fill the meter by selecting 'Collect Later' (3)
- Selecting the 'Cash In Now' option spins a *Reward Multiplier* (4)
- After the full prize amount is awarded, the meter resets. At the end of the event, rewards are given for any remaining points (5)

Key Takeaways

- New post-purchase mechanics will almost always generate revenue increases
- Basing the reward on total spend allows players to use *their preferred method* to increase spend (either with more transactions or more spend-per-transaction)
- Consider adding a 'Deal or No Deal' mechanic to increase the *thrill*. The moments immediately post-purchase provide the epitome of excitement and positive reinforcement
- Only release an amount-spent meter for a short time, so that players do not start feeling *guilt* about how much they have spent on fun and entertainment
- Like in *Cashback Extravaganza*, scale up the rewards-per-dollar as players spend more



DAILY FUTURE REWARDS

FEATURE SNAPSHOT

Jackpot Party released *Welcome Back Week*, a daily gift event with a fill meter and next-day reward

Detailed Information

- Release: 7/13/18
- Player Motivation: Ownership
- Player Personas: All

Report References

- *Retention Calendars* in the [September 2017 Casino Report](#)
- *Quick Wins* in the [November 2017 Casino Report](#)
- *Daily Streak Events* in the [March 2018 Casino Report](#)

Related Features

- [Jackpot Calendar](#) - Jackpot Party
- [Monthly Magic Reward](#) - Wizard of Oz
- [Daily Streak](#) - Poker Heat

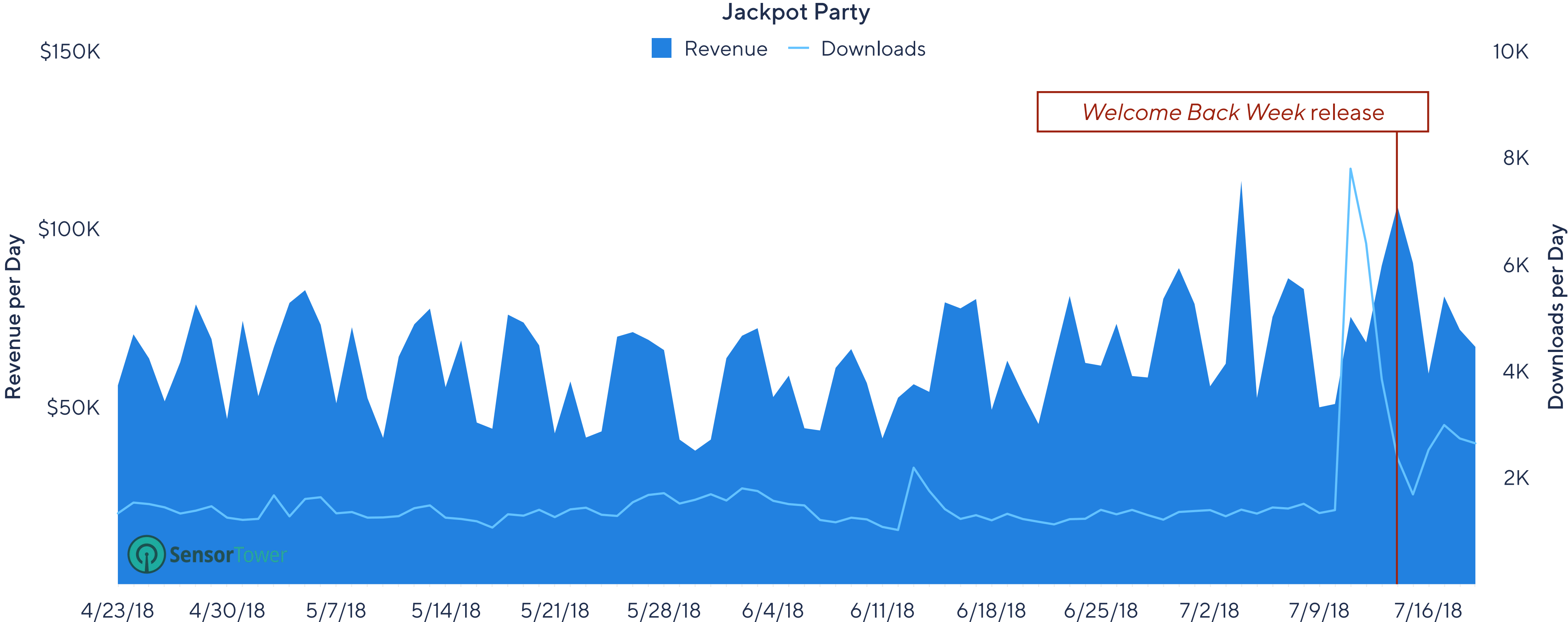
[Click here for more images and videos of Welcome Back Week](#)



IMPACT ANALYSIS

Revenue increased 16% WoW during the *Welcome Back Week*. Spike in downloads due to an app update requiring players to download the newer app version (see [UI Update](#) for details)

Time Period	Impact
WoW	16%
Wo2W	6%
Wo3W	23%



Graph data is iOS-only in the U.S.
The Time Period is WoW, Wo2W, and Wo3W because the feature was released so recently

INSIGHTS & ADVICE

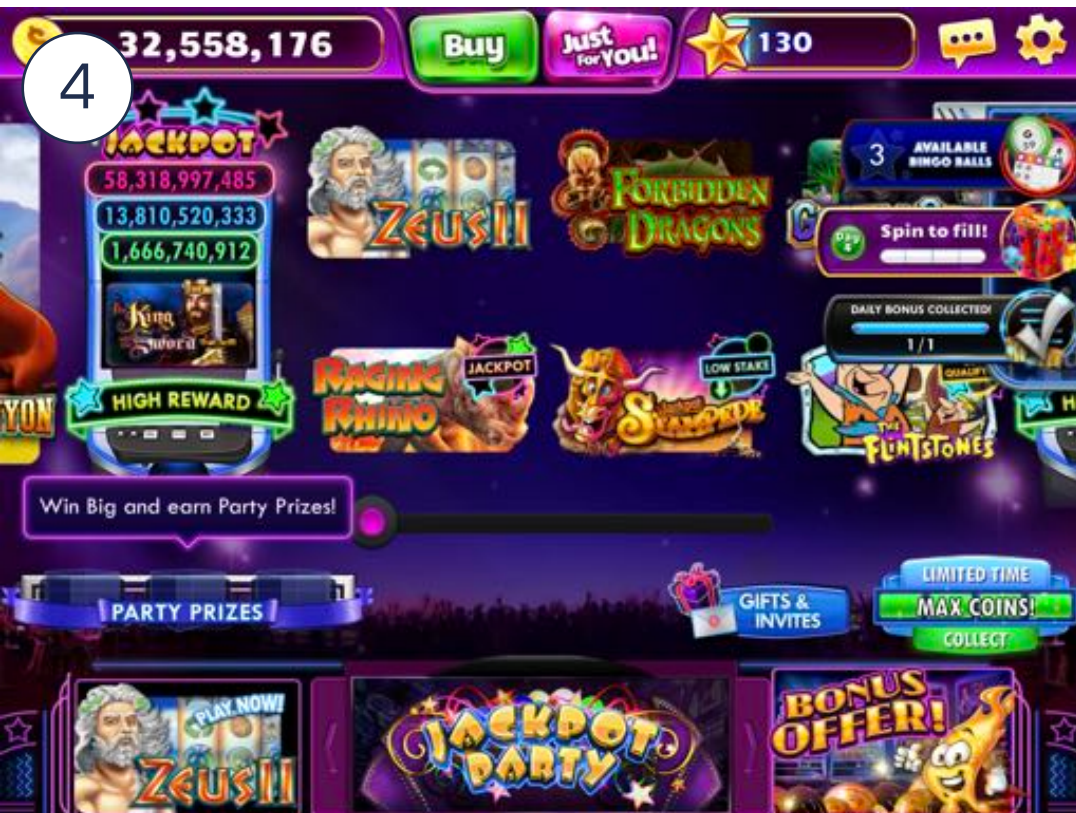
Test increasing the *size* and *timing* of future incentives to drive retention.
 Consider providing *some* immediate benefits to keep players engaged

Feature Details

- Upon app-entry, a *Welcome Back Week* dialogue with a fill meter is displayed (1)
- Players must spin any machine to fill the meter (2)
- Once the meter is filled, players are notified they can collect their prize the next day (3)
- Players can check progress through a side menu, which also displays automatic fill meter alerts (4)
- Players can collect their prize upon app-entry the *following* day (5)
- If the meter is filled consecutively for 7 days, players win an additional streak reward

Key Takeaways

- Economy-based features and tuning have produced some of the most impactful retention-driving innovations
- These types of features, like the *Welcome Back Week*, are fairly cheap to build ... so continue to include them in your roadmap
- Although the Expected Value of these features is often high, they require long testing periods, which limits their ability to make an *immediate* impact. Minimize this time by taking risks with the economic changes during testing to produce clearer, more immediate results. If no early results are seen (with larger variances to the economy), the test can be shut off
- Provide players both free and paid subscription-based versions of this feature to drive repeatable conversions with payers



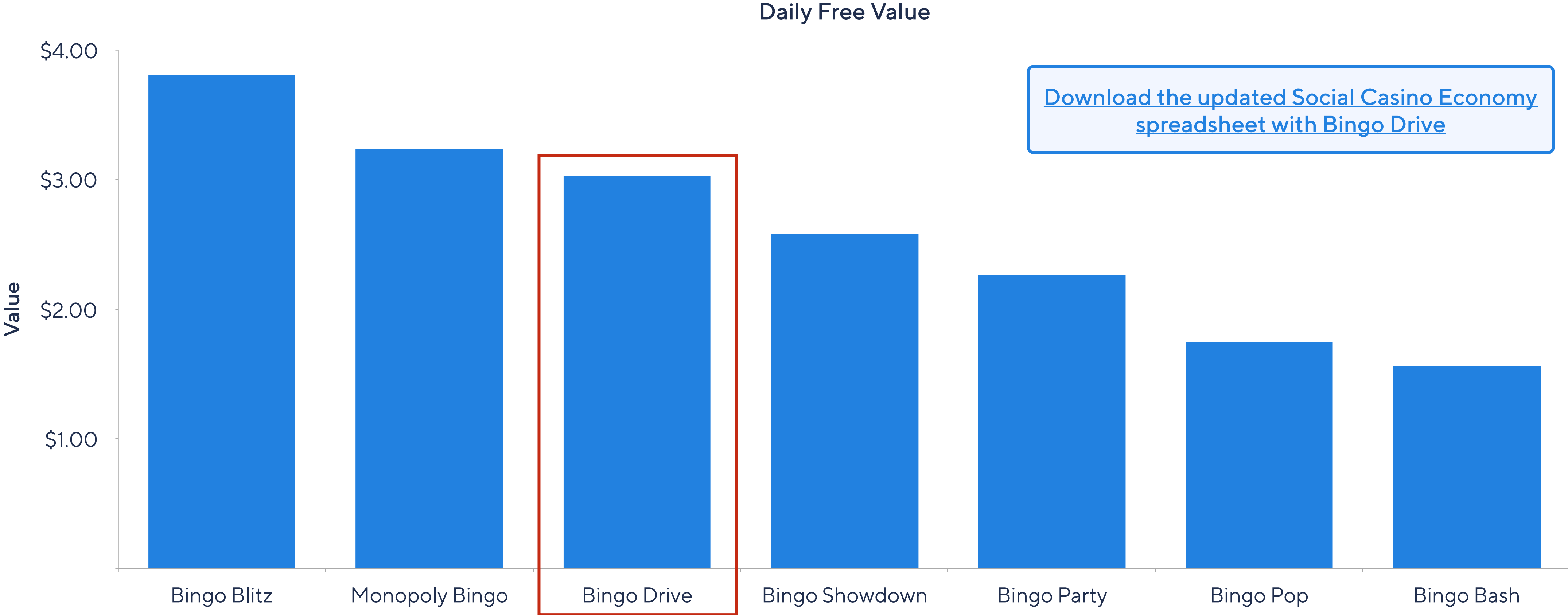
ECONOMY ANALYSIS



BINGO DRIVE

BINGO DRIVE ECONOMY

For a full breakdown of Bingo Drive's new user economy compared to 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 the economies adjust based on player engagement



The Daily Free Value is the amount of value (or, currency converted to a dollar value using a \$5 package) that players receive from free bonus features

MARKET WATCH



6/15/18 - 7/14/18

NOTABLE FEATURES I

Game	Name	Description
Slotomania	Badges of Honor	Players collect <i>Badges</i> and rewards for completing <i>Achievements</i> , which are assigned to featured machines (1)
DoubleDown Casino	High Limit Room	Players can gain access to a room featuring 2x jackpot wins, a <i>Jackpot Wheel Bonus</i> , and early access to new slots machines. Players are granted access based on <i>VIP Status</i> , purchasing <i>Boosts</i> , or spinning 3 days in a row
	VIP Vouchers & Booster	<i>VIP Vouchers</i> multiply the coins awarded for purchased packages. <i>Boosters</i> are added to certain packages and unlock additional benefits for a limited time (2)
	Diamond Club Update	The <i>VIP Rewards</i> program now includes 11 different tiers, with <i>Vouchers</i> and additional benefits for members who purchase coin packages with <i>Boosters</i>
Heart of Vegas	Pirate's Plunder	Players spin in any machine to complete <i>Milestones</i> on a fill meter and add coins to a <i>Chest</i> . Completing all 5 <i>Milestones</i> awards the <i>Chest</i> (3)



NOTABLE FEATURES II

Game	Name	Description
Bingo Blitz	Blitz's Diner	Players collect <i>Ingredients</i> in Bingo rooms to make <i>Dishes</i> and unlock rewards. <i>Boosting</i> cards reward rare and additional ingredients (1)
Huuuge Casino	New Lottery & Lottery Bonus	The <i>Lottery</i> feature had two updates. The second update adjusted the <i>Lottery Bonus</i> to compensate players for lower puzzle prizes (2)
Caesars Slots	Ultra Zone	Players collect 100 tickets to play a <i>Pachinko</i> mini game. Tickets are collected by spinning machines, making purchases, completing <i>Challenges</i> , and certain level-ups
Jackpot Party	UI Update	A new user interface with a mandatory update for all users. The "HD" was removed from the app's name
my KONAMI Slots	Daily Challenges	Players complete up to 3 <i>Challenges</i> at a time to earn rewards, chips, and XP (3)



[Click here for the full list of content released this month](#)

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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