



LIQUID & GRIT

Casino Report

Competitive Research and Actionable Product Recommendations

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SEPTEMBER

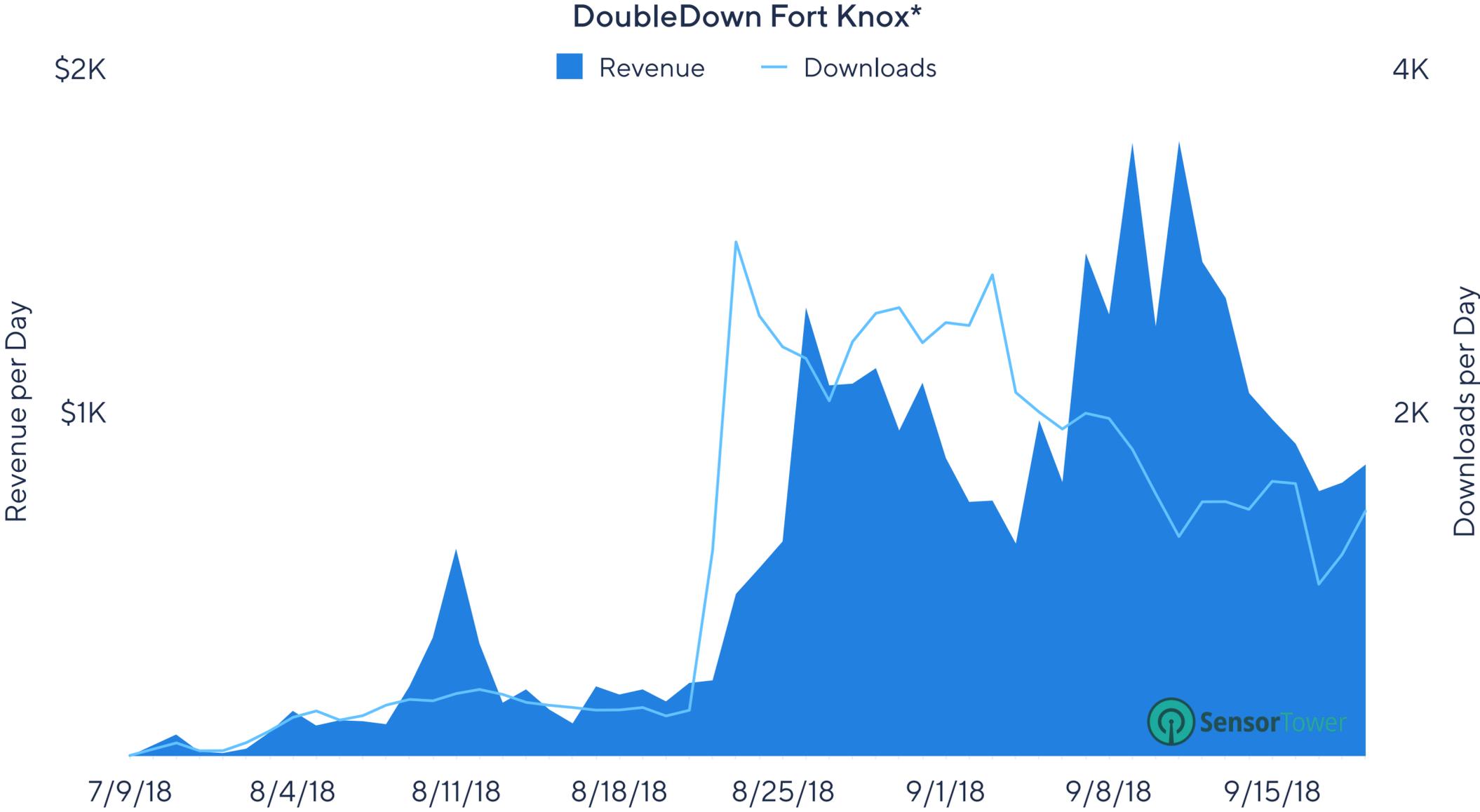
2018

STRATEGY INSIGHTS



NEW APP: DOUBLEDOWN FORT KNOX

DoubleDown Interactive released a new app, DoubleDown Fort Knox. Players can easily swap between *portrait* or *landscape* view in any area of the app and *full screen* or *cabinet* view in any machine. A \$4.99 auto-renewing subscription currently drives the most transactions



*Graph data is iOS U.S. only

Notable Features

- [Casino View](#): Machines can be played *full screen* or *cabinet* view
- [Keys](#): Players earn and save *keys* to unlock any machine

Other Features

- [Bonuses](#)
- [Kitty Bank Subscriptions](#)
- [New User Flow](#)
- [Misc. Features](#)
- [Misc. Currency](#)
- [Scratchers](#)
- [Fort Knox Mystery Jackpots](#)

Version Updates

- 8/16: *Kitty Bank*
- 8/21: Subscriptions (*Kitty Bank* converted to a subscription)
- 9/4: New slot machine: *Turquoise Princess*

REVENUE DRIVERS

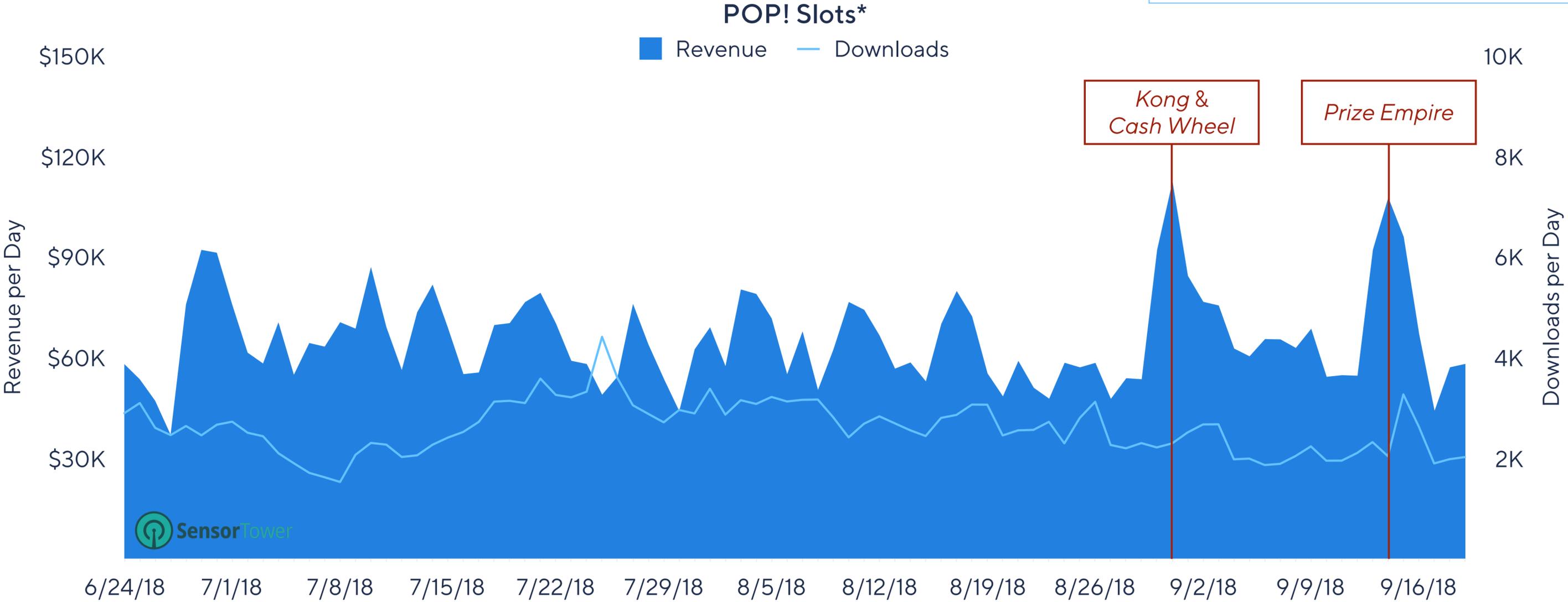


REPLAYABLE MISSIONS

IMPACT ANALYSIS

POP! Slots paired the release of the *Kong* machine with a *Cash Wheel* event to drive a 50% WoW spike in revenue. Then, they released a missions event, *Prize Empire*, to spur a 23% WoW peak

Category	Impact
<i>Kong & Cash Wheel</i>	+50% WoW
<i>Prize Empire</i>	+23% WoW
Motivations	Ownership, Achieve
Persona	Night-Out Nancy



*Graph data is iOS U.S. only

INSIGHTS & ADVICE

Decrease feature churn with replayable missions. Test different header text before the feature releases to increase CTRs

Machine Details: Kong

- The IP-themed machine includes a *Colossal Link* respin feature with *Colossal Symbols* converting into *Prize Wheels*, and a *Pachinko*-style social bonus (1 & 2)
- The machine release was paired with a *Kong*-themed *Cash Wheel* event, awarding players a spin of a *Prize Wheel* with qualified purchases (3)

Feature Details: Prize Empire

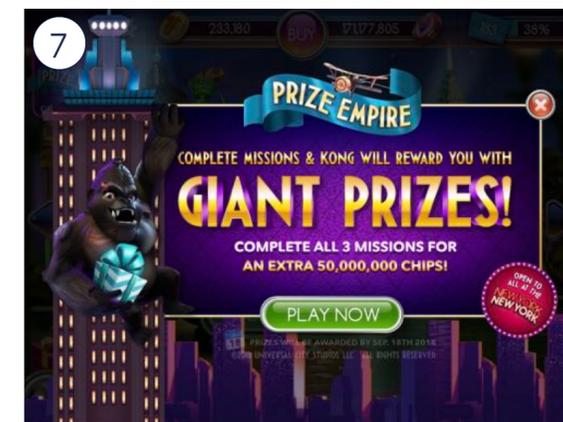
- Players complete missions during the three day event (4)
- All missions must be completed in the *Kong* machine. Progress is displayed in the machine (5)
- There are three missions ... each with two challenges. Players can complete mission multiple times to receive mystery prizes (6)
- Players who complete all three missions will also receive a *Special Bonus* (7)
- A *One Time Super Offer* of chips and a *Lucky Scratch* card is available during the event (8)

Key Takeaways

- Linear, progressively-difficult mission systems will cause players to drop off at the point where the difficulty of the mission exceeds the player's desire to achieve that mission. Allow the missions to be won multiple times ... keeping more players engaged with awards
- Build in an extremely hard mission to 1) Add a large potential prize and, 2) Use that number in marketing
- Marketing with numbers (\$1,000,000 as opposed to one million dollars) will generate 500 basis points more CTRs. Include a dollar sign (\$) to also increase CTR and use strong statements (over questions)
- Invest time in the marketing and header text. Leverage an external tool to test different headers prior to feature launch for better CTRs

Kong

Prize Empire



FEATURE REFERENCES

Machine releases with *Cash Wheels* drove a 25% WoW increase in revenue for POP! Slots back in April. Scatter Slots, and now newcomer Lightning Link Casino, are two successful mission-based apps

Feature Details: POP! Slots

- In April, a new machine with a purchase event is marketed at app-entry (1)
- After a qualifying purchase, a 'Success' dialogue appears, followed by the *Cash Wheel* screen (2)

Feature Details: Lightning Link Casino

- Players progress tiers by completing missions (3)
- Completing missions awards *Lightning Bolts*, which are collected during a 2-week *Stormy Season* (4)

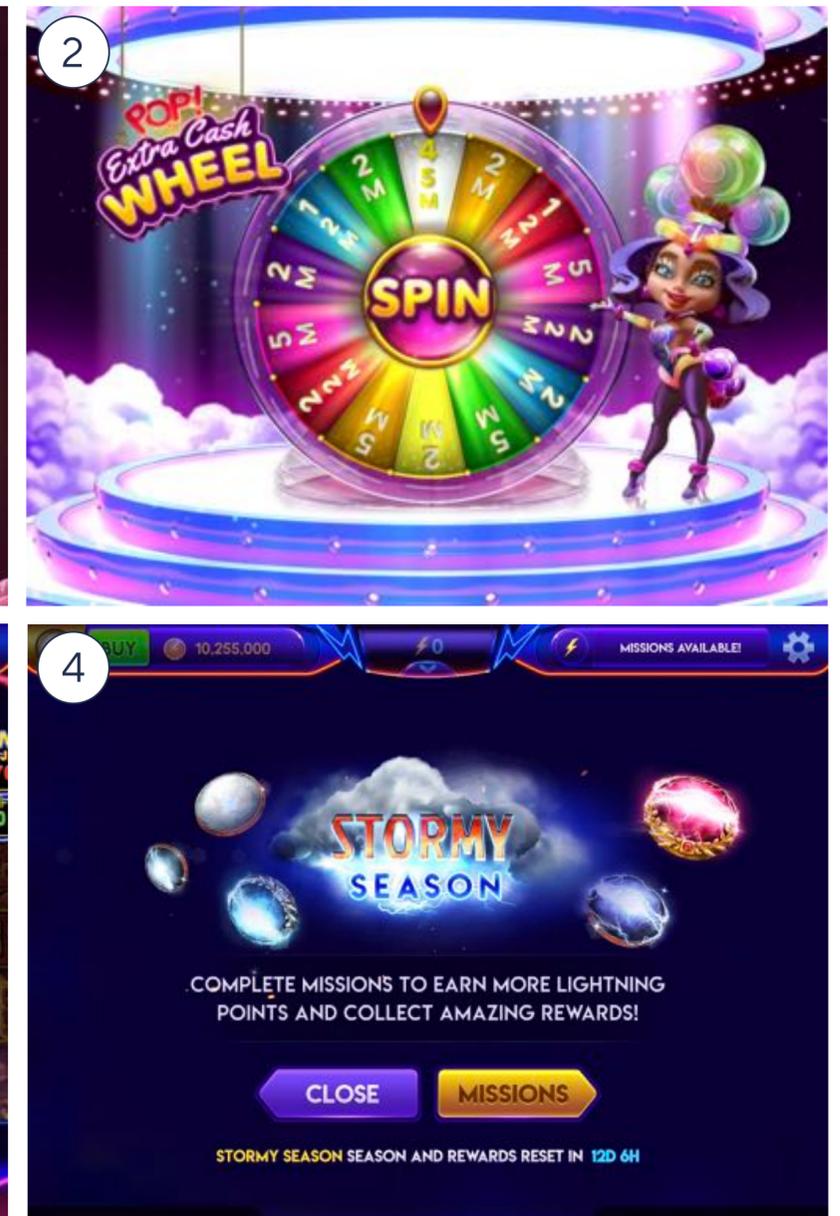
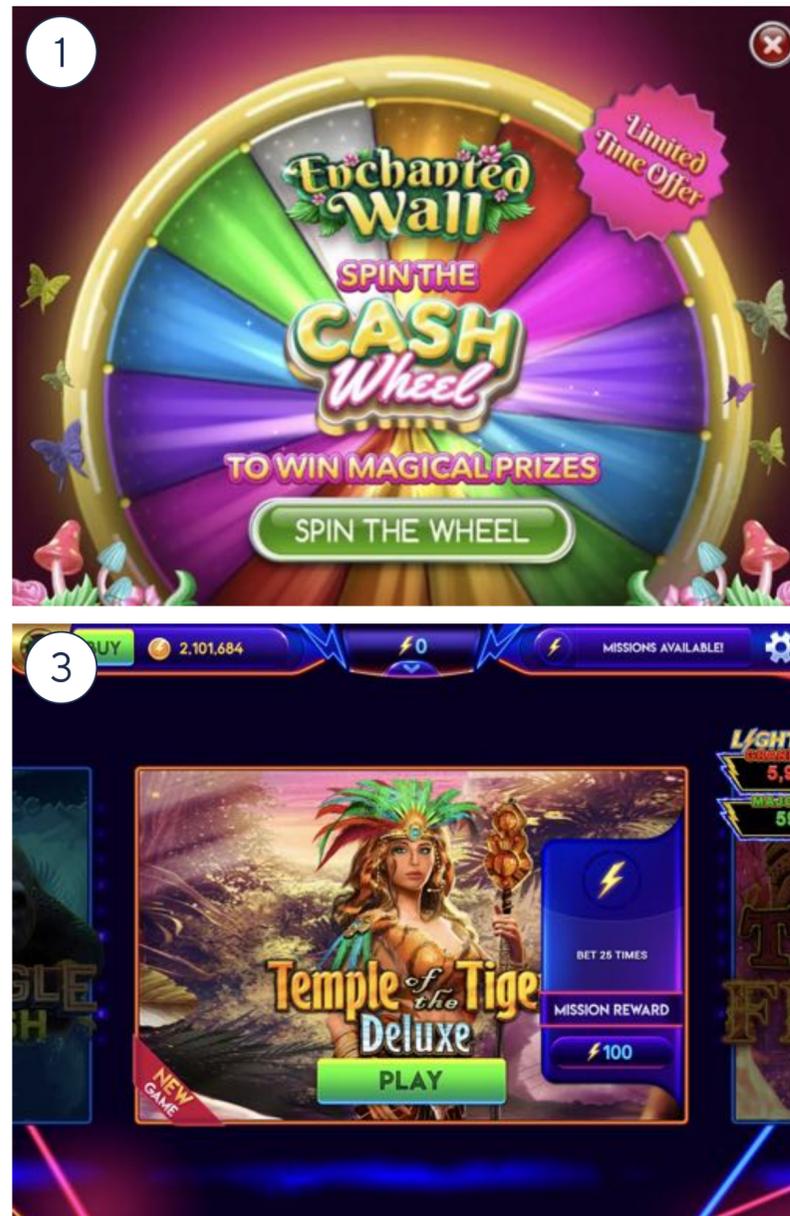
Report References

- Content Releases with Cash Wheel - [April 2018 Product Report](#)
- New App: Lightning Link Casino - [August 2018 Product Report](#)
- IP Update (Kong) - [September 2018 Slots Design Report](#)

Related Features

- [Cash Wheel](#) - POP! Slots
- [Missions](#) - Lightning Link Casino
- [April Quest](#) - Scatter Slots

[Ask Liquid and Grit a Question](#)



NEW INNOVATIONS

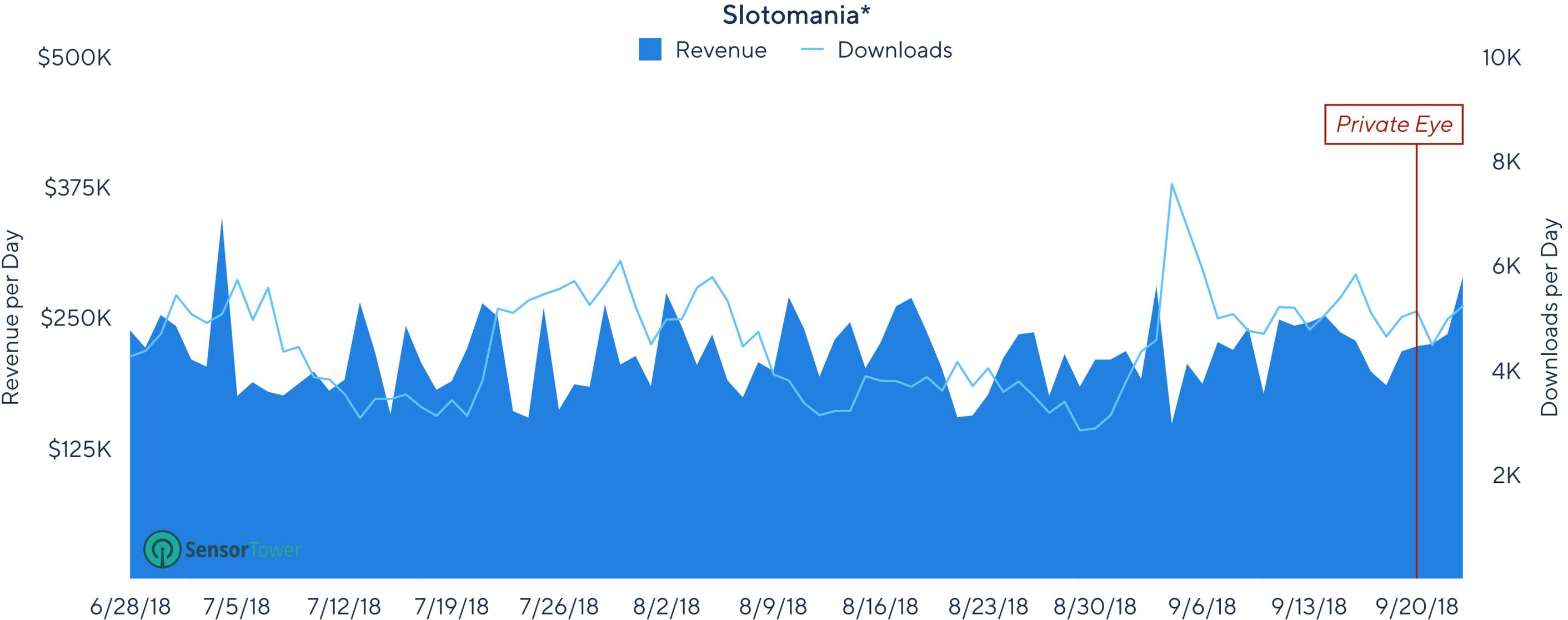


OUTSIDE GENRE MINI-GAMES

IMPACT ANALYSIS

Slotomania's new Hidden Objects-inspired event *Private Eye Lucy & I* drove a 13% 3Do3D increase in revenue. Results are still early to determine feature impact

Category	Impact
Impact	+13% 3Do3D
Motivations	Surprise, Awe
Persona	Night-Out Nancy



*Graph data is iOS U.S. only

INSIGHTS & ADVICE

Know your competition: mobile forms of entertainment. Do not limit your thinking to other games and game-genres. The competition includes social media, email, and text messages

Feature Details: *Top Secret Challenge*

- At app-entry, players are notified of a three-day challenge (1)
- Players are then taken to a webpage to submit answers (2)
- Additional letter clues are added daily

Feature Details: *Private Eye Lucy & I*

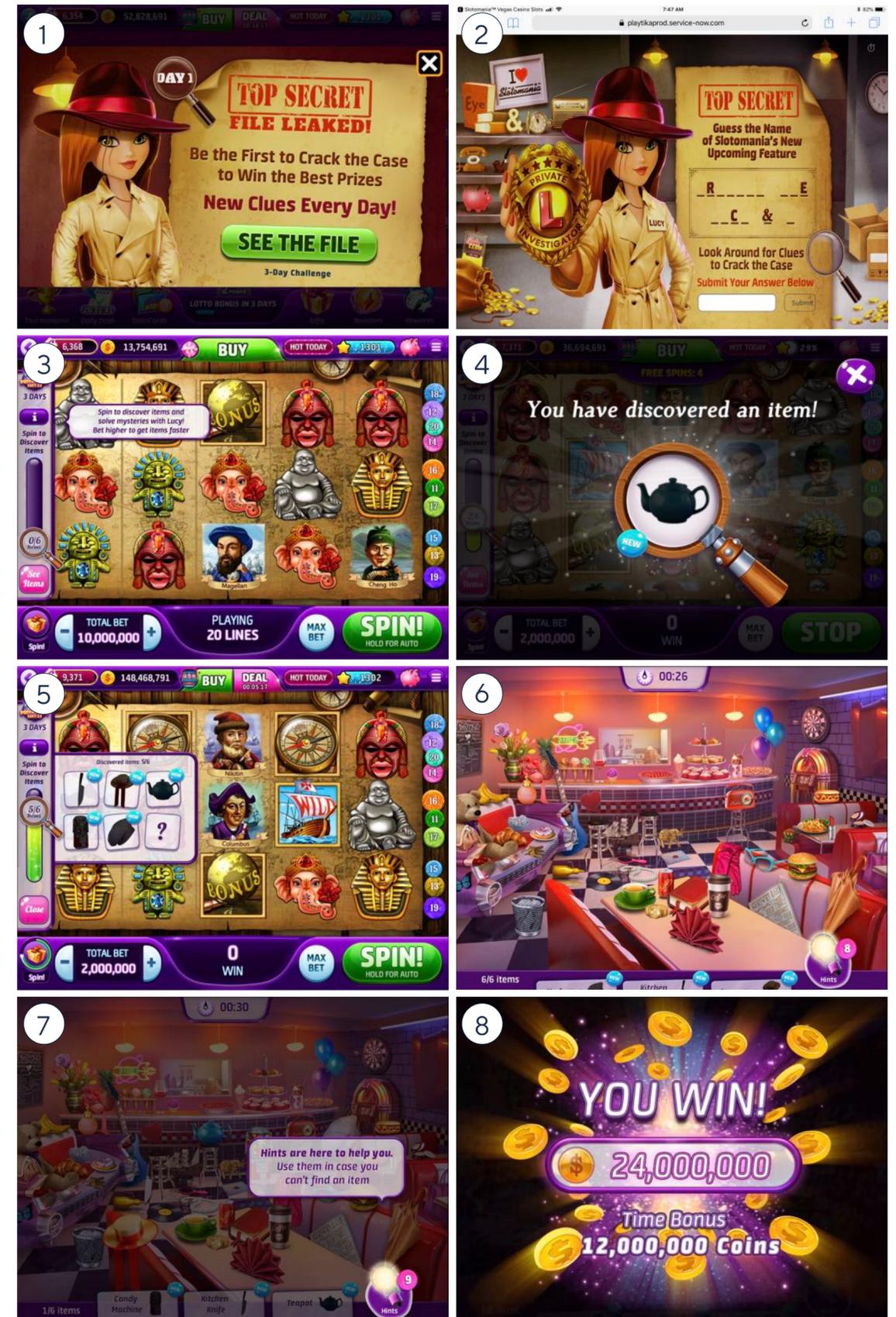
- Players spin in any machine to fill a meter to collect *Items* (3 & 4)
- Found *Items* are visible by clicking the *See Items* button (5)
- Collecting six *Items* triggers a Hidden Object mini-game. Players have 30 seconds to find *Items* (6)
- Players are given four *Hints* and can obtain additional *Hints* with certain coin packages (7)
- Finding all the *Items* awards a coin prize and an additional bonus based on unused time (8)

Key Takeaways

- Games provide *emotional* and *functional* jobs for players—often more than one at the same time
- To increase engagement, understand your direct competition (other games in your genre) and your indirect competition (games in other genres and non-gaming apps)
- Offer players the opposite feeling of the main game with the mini-game experience. If players are constantly striving to *achieve* by completing new levels, use the mini-game to let them easily find *flow*, or a feeling of deep concentration and escape, with the mini-game
- See [Jobs to be Done](#) information in the Appendix for more information

Top Secret Challenge

Private Eye Lucy & I



FEATURE REFERENCES

Hidden City and Seekers Notes breakup Hidden Object play with match-3 and other style mini-games

Feature Details: Hidden City

- Players are offered three types of mini-games by unlocking additional locations that offer match-3, memory match, and a version of *Minesweeper* (1)
- Additional mini games, or variations of current mini-games, are often added with *Monthly Events* (2)
- Current mini-games are: match-3, memory match, and *Minesweeper*

Feature Details: Seekers Notes

- Four types of mini-games can be unlocked: match-3, slider puzzle, memory match, and link-3 (3 & 4)

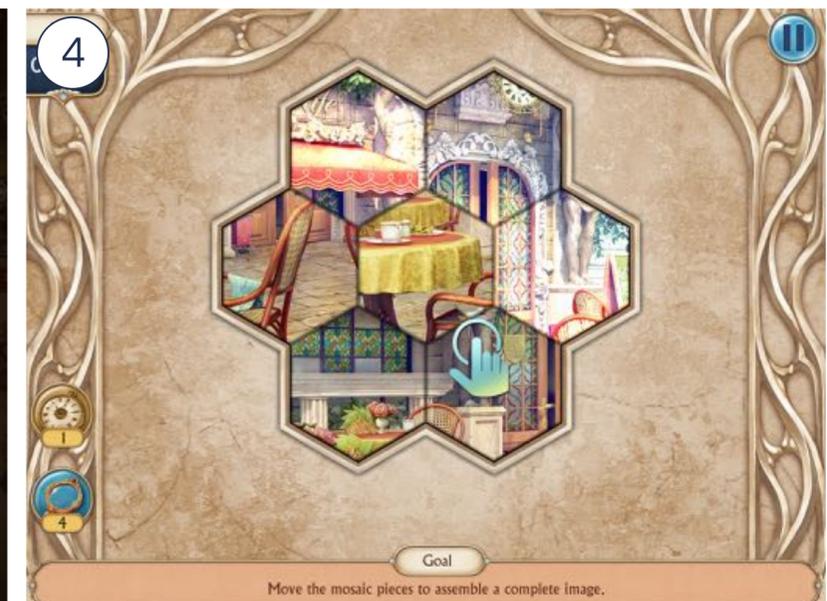
Report References

- Trivia Mini-Games - [January 2018 Product Report](#)
- Tamagotchi Pet Dragons - [May 2018 Slots Design Report](#)
- Asymmetrical Progression - [September 2018 Slots Design Report](#)

Related Features

- [Puzzle Features](#) - Seekers Notes
- [Copenhagen](#) - Bingo Blitz
- [Poker Recall](#) - WSOP

[Ask Liquid and Grit a Question](#)



FEATURE RECAPS



FEATURE RECAP

In the August 2018 Casino Report, *Tournamania* was listed as a Removed Feature for the release of *Head to Head*. *Tournamania* has returned to the app in the latest update (1). It was still available during the most recent *Head to Head* event release (2)



REMOVED FEATURES



CHARMS IN HIT IT RICH!

Hit it Rich! removed *Charms*. *Charms/Boosters* are effective purchase sweeteners, as used in Slotomania. However, don't expect them to drive strong social or purchasing behavior

Removal Information

- Players were notified at app-entry of the upcoming removal (1)

Feature Information: *Charms* in Hit it Rich!

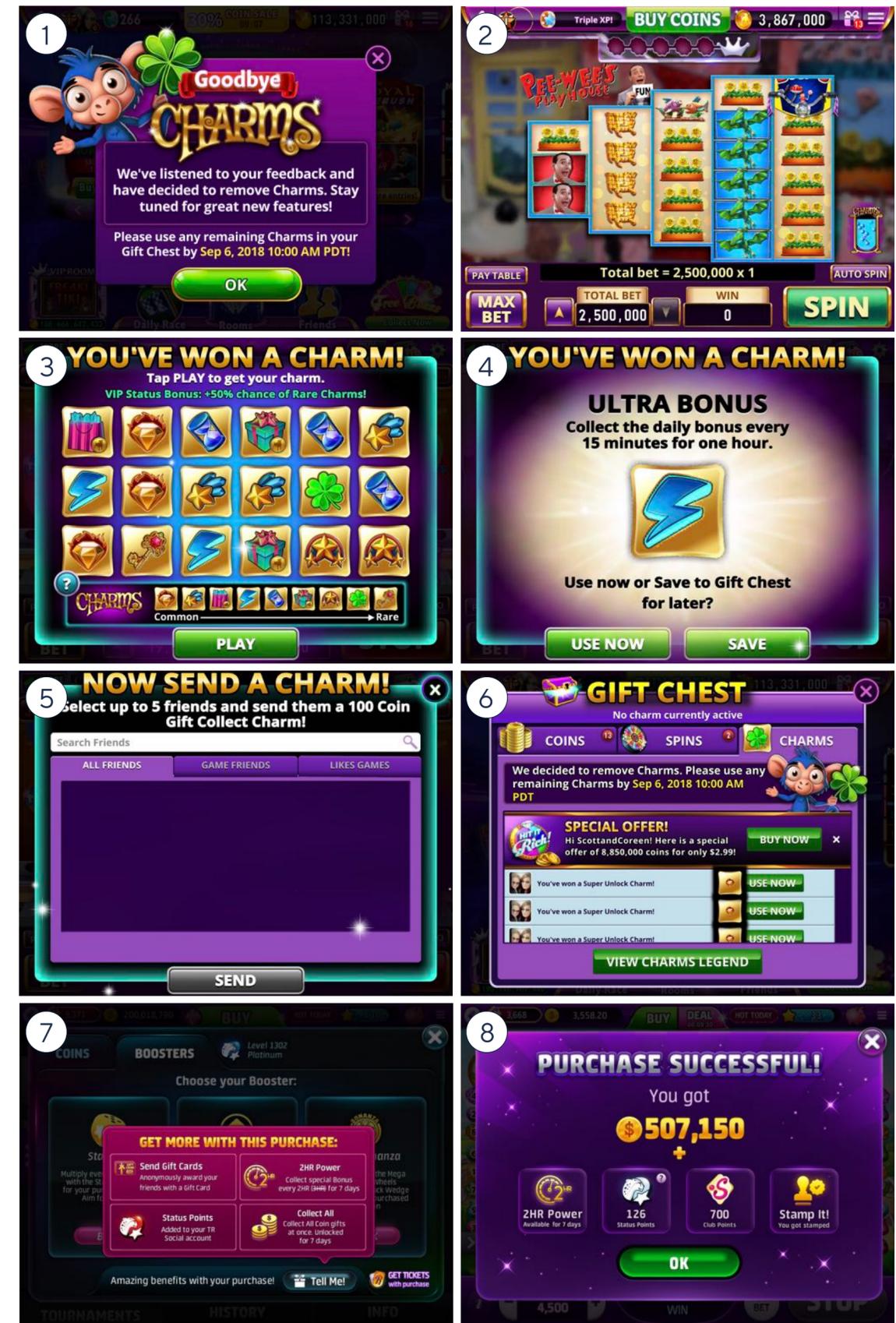
- Players earned *Charms* by spinning in any machine to fill a meter (2)
- Once the meter was filled, players won *Charms* (3)
- Players had the option to 'Use Now' or 'Save' ... followed by a friends gifting dialogue (4 & 5)
- *Charms* collected by players could be viewed and activated for one hour through the *Gift Chest*
- There were 11 different *Charms* available that applied boosts to: XP, content unlocks, bonuses, gifts, and mini-game triggers (6)

Feature Information: *Boosters* in Slotomania

- Slotomania's post-purchase flow showcasing the usage of *Boosters* (7 & 8)

Original Release

Feature Removal



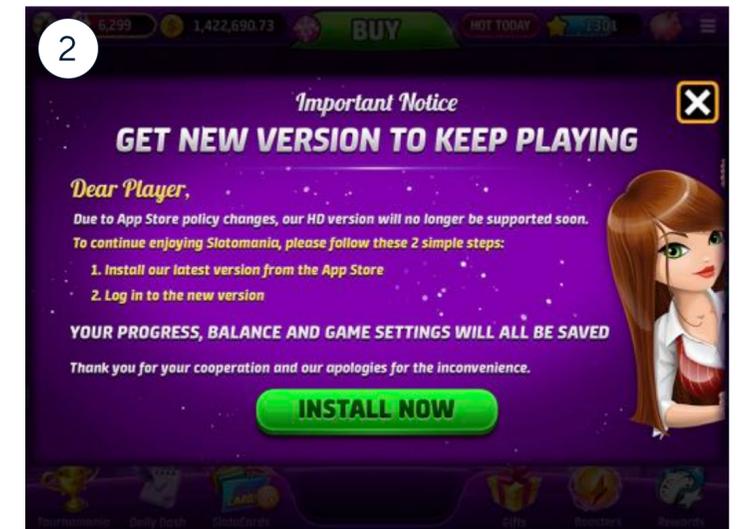
MARKET WATCH



8/15/18 - 9/14/18

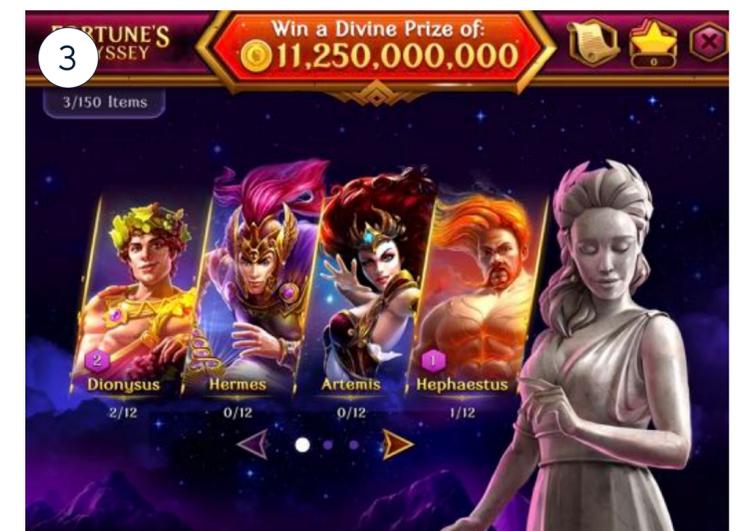
NOTABLE RELEASES I

App	Feature	Description
Slotomania	Farmer's Fortunes SlotoQuest	SlotoQuest with random instant winner prizes. Players who complete the quest will receive double the prize when selling the first farm in Farm Fortune Markets (1)
	Slotomania Game Update	Notice to players that the HD version will no longer be supported due to App Store policy changes. A player's progress, balance, and game settings will be saved upon download of the new app (2)
Big Fish Casino	Club Bonus Page	Club Bonus Page centralizes all bonus awards for players to view and collect awards ... with members now receiving bonuses for each jackpot another member hits
DoubleDown Casino	Drip Offer	Purchase offer that unlocks an exclusive bonus wheel for 14 days of additional coins (3)



NOTABLE RELEASES II

App	Feature	Description
Heart of Vegas	Daily Challenges	Players complete challenges to fill a meter earning <i>Safes</i> for coin rewards (an evolution of Daily Goals) (1)
POP! Slots	All Games Are Open Raffle	Players earn raffle tickets with every <i>Big Win</i> on select machines for a chance to win a share of \$20K worth of chips (2)
Bingo Blitz	Deluxe 7-Day Giveaway	Week long login event where 1K players are randomly selected to receive gifts at login
Caesars Slots	Fortune's Odyssey	Players spin in any machine, make purchases, complete challenges, and/or level up to collect items for a new collection feature (similar to The Always Win Machine) (3)
Wizard of Oz	The Casino	Limited-time <i>World</i> release includes machines with IP not related to the movie Wizard of Oz



NOTABLE RELEASES III

App	Feature	Description
Zynga Poker - Texas Holdem	Level Up Rewards	Updated XP leveling based on hands played ... with level up rewards collected through the <i>Reward Center</i> (1)
Quick Hit Slots	Quick Hit Wheel Of Riches	Players spin to collect <i>Goodies</i> to fill a wheel's wedges for bonus spins. Completing one wheel unlocks a new wheel ... with a total of 6 wheels to unlock. Prizes include: coins, content unlocks, XP boosters, increased bonus collections, and instant XP level ups (2)
Gold Fish	Slot Quests The Golden Reel	Quest event for players to complete challenges by playing premium slots for a jackpot reward
myKONAMI Slots	Dueling Dragons	Team tournament event for players to earn points by winning tournaments for individual and team real-world prizes (Apple iPad and \$250 Apple gift card) (3)

[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 adapted from Vahlo, Kaakinen, Holm, & Koponen. "Digital Game Dynamics Preferences and Player Types", *Journal of Computer-Mediated Communication*. 2017

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

“Be a yardstick of quality. Some people aren't used to an environment where excellence is expected.”

- Steve Jobs

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