



LIQUID & GRIT

Casino Report

Competitive Research and Actionable Product Recommendations

EXECUTIVE SUMMARY



“Creativity is just connecting thingsThe broader one's understanding of the human experience, the better design we will have.” - Steve Jobs

Revenue Drivers

Caesars Slots released an *initially free* mini-game event that helped grow revenue by 13% WoW. This less-prohibitive flow, which is an innovative twist on the spin-to-play framework, can be applied to almost any event system. Review this section to learn how this method can increase event adoption and engagement.

In Soft Launch

Zynga’s Game of Thrones Slots will offer players three core features: daily quests, clubs with group competitions, and card collections. The machines and features throughout the app are heavily influenced by the IP. Review this section to quickly understand all of the app’s features. Then, utilize the Feature Database to see specific screenshots and game flows ... before it goes live in all GEOs.

Breakout Apps

This report reviews four apps released in Q4 2018 that are now top 100 grossing in the iOS Casino category. Three of the apps adopted a Plus One product strategy, building very similar features to current top grossing apps ... while making some improvements. Go through this section to see the latest top grossing competition, and to bookmark our online spreadsheet that lists the top 200 grossing Casino category apps by release date.

Extended Economy

From install to level 25, the *Extended Economy Casino.xlsx* details the economy inflow and outflow from 10 top grossing Casino apps. Use this section and the downloadable spreadsheet to shift value in the new user economy out of *relatively generic bonuses ...* and into *more delineative features and events*.

Market Watch

Review this section for highlights from the most recent releases. Then, go to the Data Tool in the Client Portal to see everything new released in Casino ... with the ability to open images and videos of any feature, event, and machine with a single click.

Brett Nowak
CEO

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APRIL

2019

REVENUE DRIVERS

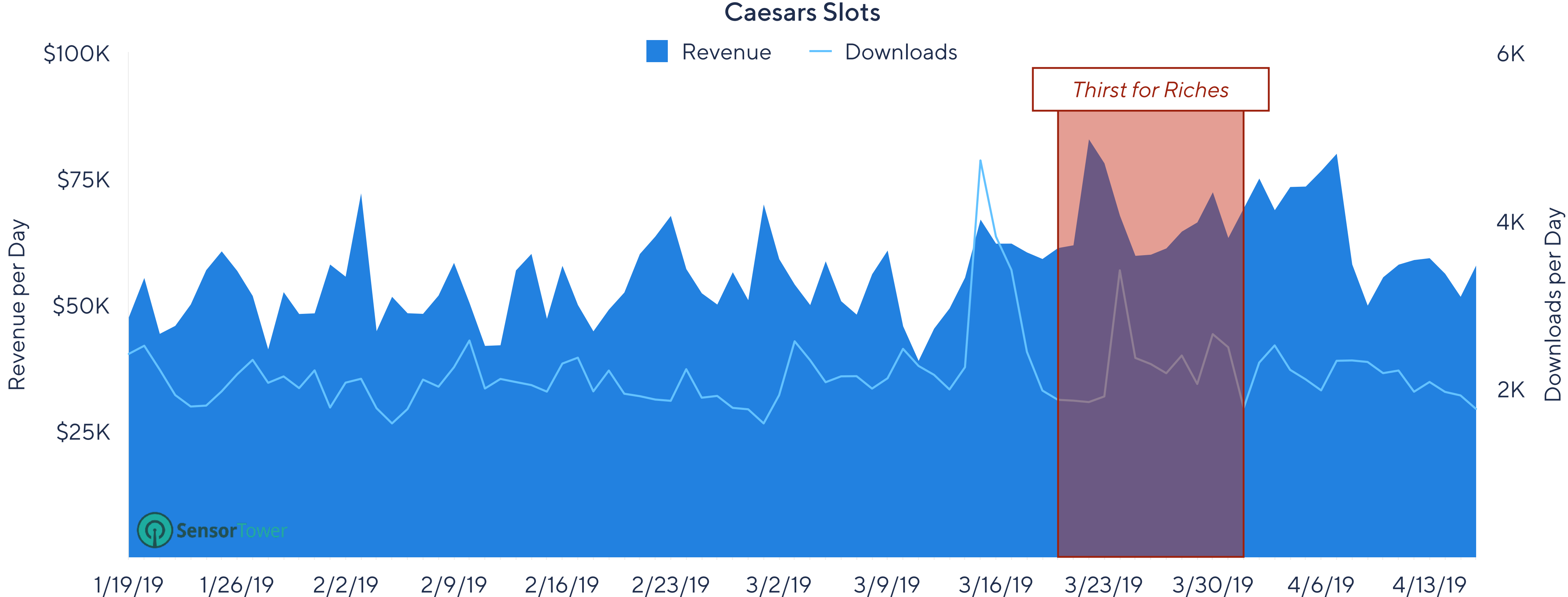


MINI-GAME EVENTS

Thirst for Riches in Caesars Slots

IMPACT

Caesars Slots' revenue increased 13% WoW during the release of *Thirst for Riches* (live from 3/20 to 4/1). Revenue growth may also be due to the recent spike in downloads, and the release of sales-related events like *Cashback* (released 3/20) and *Coin Party* (released 3/22).



*Headline and graph data is iOS U.S. only
WoW = week over week

TEARDOWN

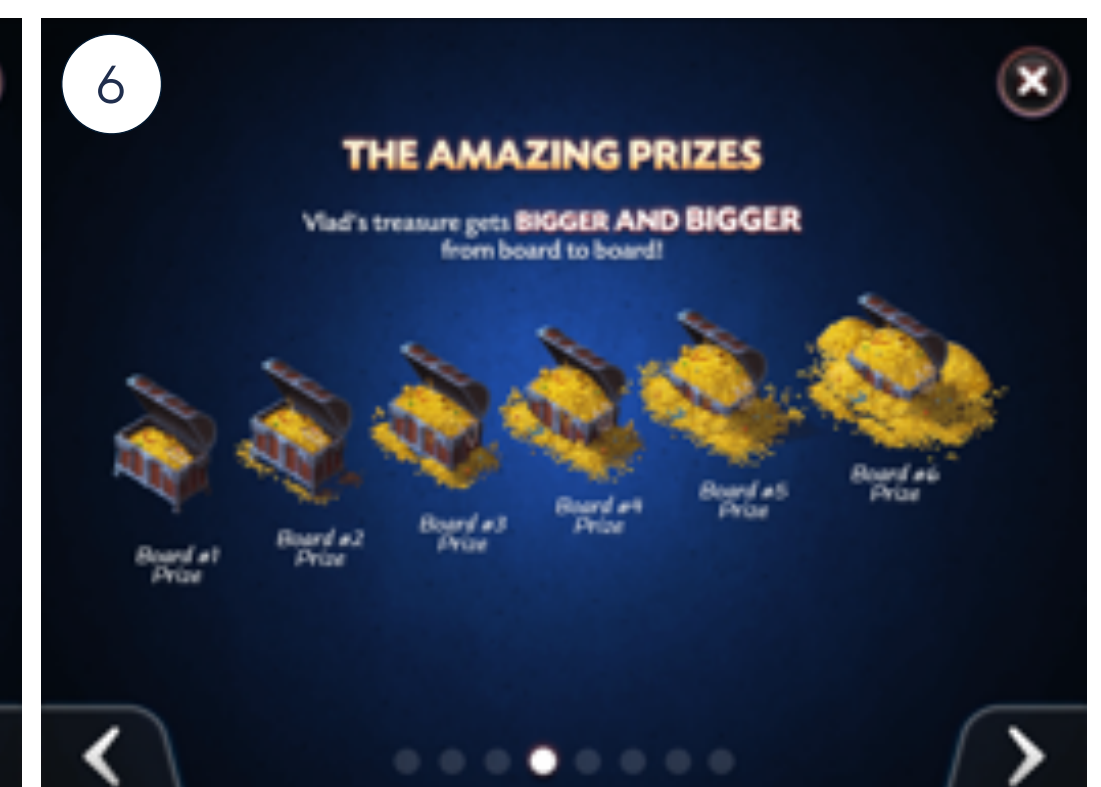
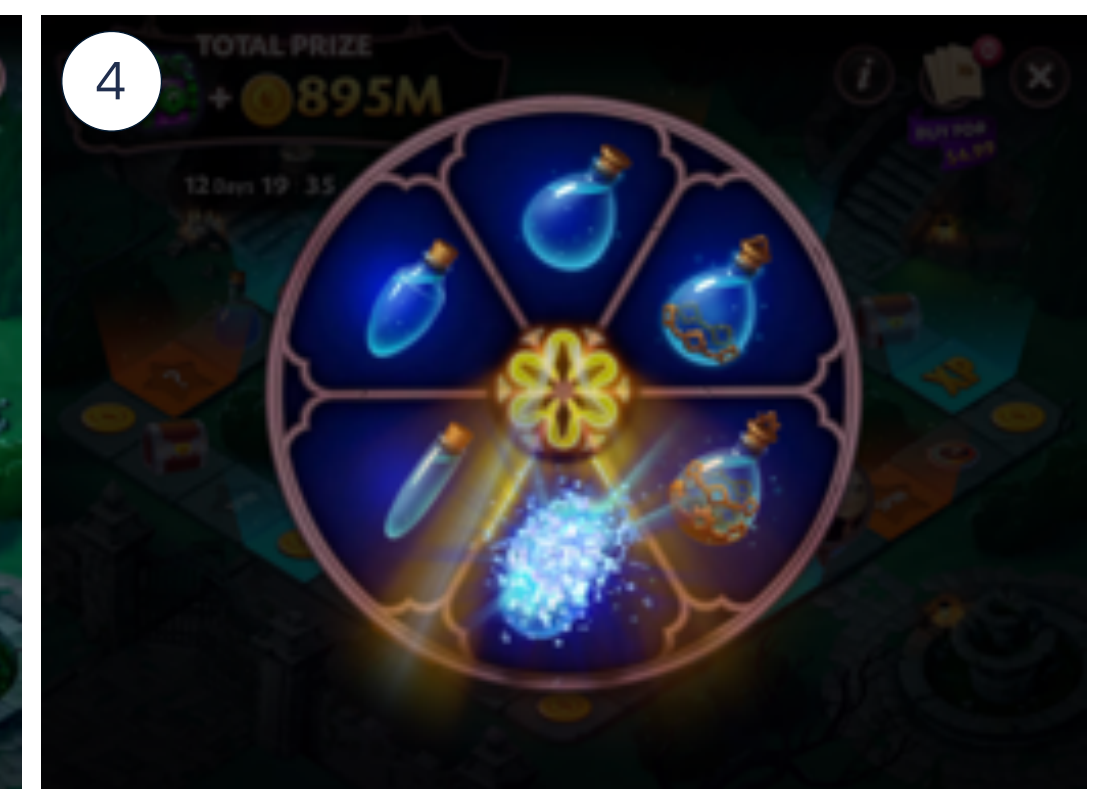
The mini-game starts automatically, with players rolling the *Dice* to advance. Depending on the tile, players can weaken the mini-game's villain, earn rewards, get assigned missions, and more.

Feature Details

- Upon app entry, a dialogue informs players that they can win chests and coins (1).
- A second dialogue markets a package with *Mission Skips*, *Vials*, and coins (2).
- In the mini-game, players roll the *Dice* to start (3).
 - *Vial* tiles trigger a wheel that determines the *Vial's* strength. The *Holy Water* in the *Vial* weakens *Vlad*, the villain (4).
 - *Mega Reward* tiles include rewards, like *Mission Skips* (5).
 - *Mega Mission* tiles assign missions, like hitting a *Big Win*.
 - There are also other tiles, such as chests for collections, XP, and bonus boosts.
- Draining fully *Vlad's* meter awards the treasure chest of coins.
- There are six boards with increasingly larger rewards (6).

Additional Information

- [Thirst for Riches](#) (released 3/20)
- [Cashback](#) (re-released on 3/20. Originally released 7/9/18)
- [Coin Party](#) (released 3/22)



INSIGHTS

Make playing free to increase the event's percentage of engaged players. Visually design the game to represent positive odds, and then extend the progression using a multi-hill system to monetize highly-engaged players.

Product Insights

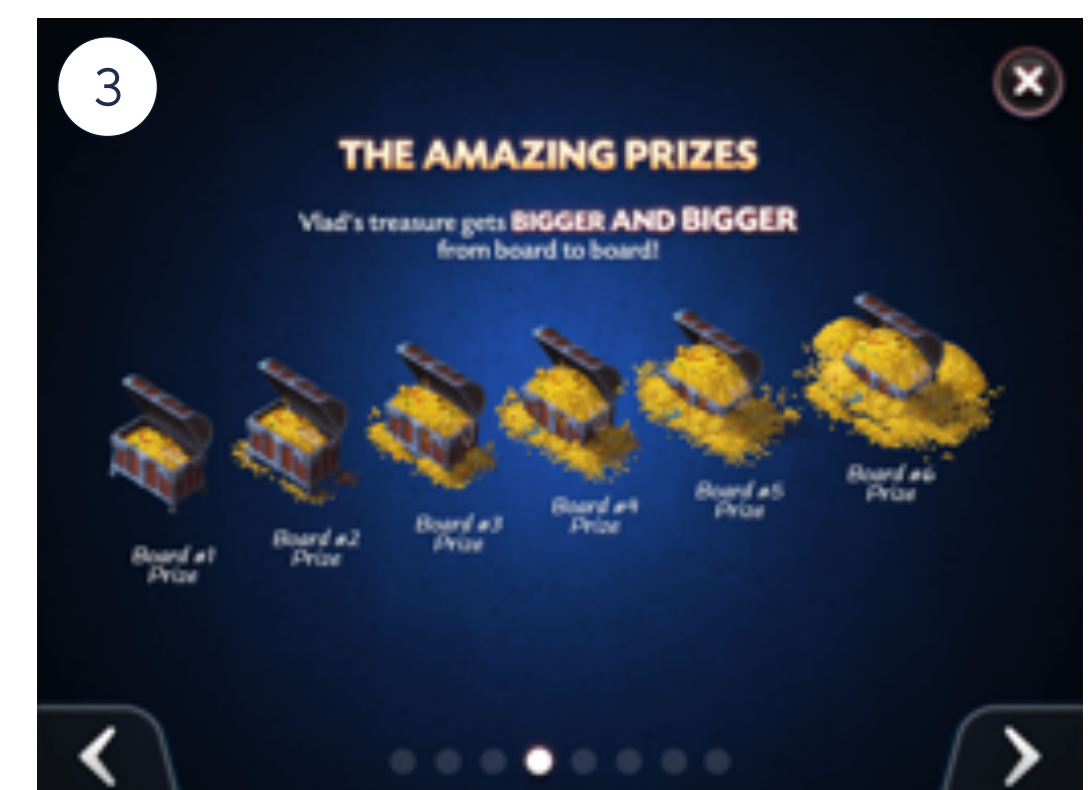
- **Play:** The free initial play in *Thirst for Riches* makes the mini-game feel more like a gift with the potential to win. Once players are enjoying the game, then a cost is introduced in the form of a *Mission* (1).
- **Design:** The board's design implies that players have an equal chance of hitting a *Reward* or *Mission* tile. Make sure that the design is only *slightly* better than expected odds ... to avoid players feeling deceived (2).
- **Progression:** Build in an extended, multi-hill difficulty curve for highly-engaged players. A multi-hill difficulty curve challenges players ... then, gives them a break before challenging them again. This system increases a player's willingness to progress over a straight lined difficulty curve (3).

Player Persona Data

- **Target persona:** *Money Mike*
- **Demographics:** He is comparatively more male and on the less-educated side of the personas. He has lower engagement, but above-average monetization.
- **Features:** He enjoys features with gambling mechanics, like mini-games (e.g. scratcher cards) and features that turn a profit, like boosts and VIP. He is not interested in social features for their lack of currency-based value.

Report References

- Bingo Collect & Progress Mini-Game in [10/18 Casino Report](#)
- Replayable Missions in [9/18 Casino Report](#)
- Content Releases with Event Stacking in [11/18 Casino Report](#)



IN SOFT LAUNCH



Game of Thrones Slots by Zynga

TEARDOWN

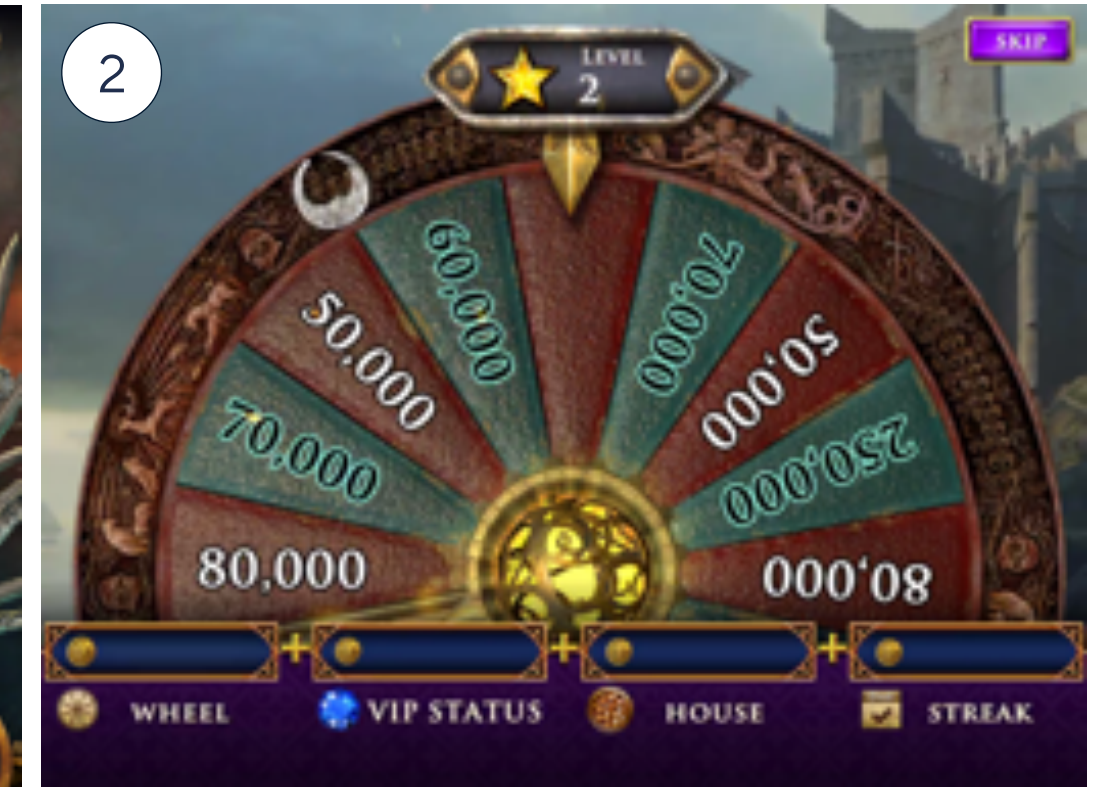
Players can complete daily quests, join clubs to compete in club tournaments, and (eventually) collect IP character cards. The IP is heavily integrated into all aspects of the app.

Feature Details

- Upon install, players enter a highly IP-themed slots app (1).
- The daily bonus increases rewards based on VIP status, club, and streak (2).
- There are three daily *Quests*, each including three missions (3).
- Players can join *Houses*, which are clubs that unlock at level 12 (4).
- The *Control the Keeps* is a club tournament. The winners are determined by total points won in select machines by *House* members (5).
- Collections appear to be coming soon. This feature did not unlock during play (6).

Additional Information

- [New User Flow](#)
- [Houses](#)
- [Control the Keeps](#)
- [Daily Bonus](#)
- [Collections](#)
- [Quests](#)
- [Gifting](#)

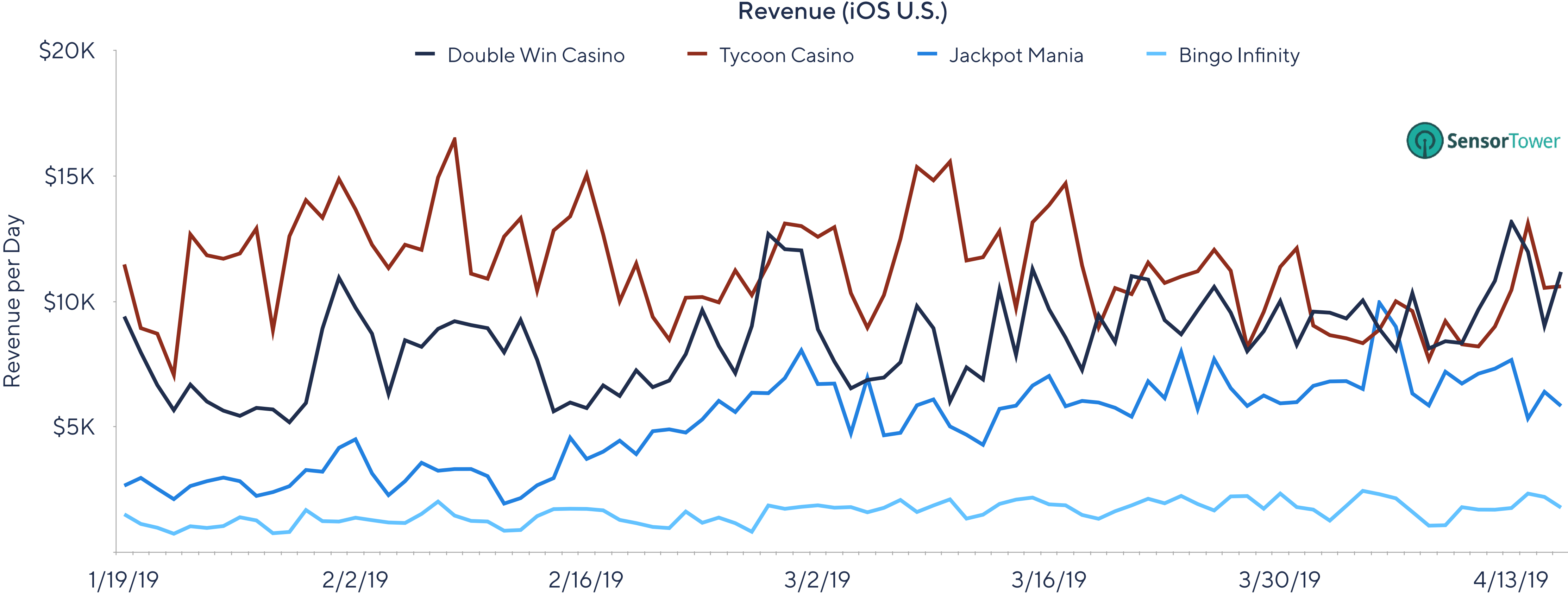


BREAKOUT APPS



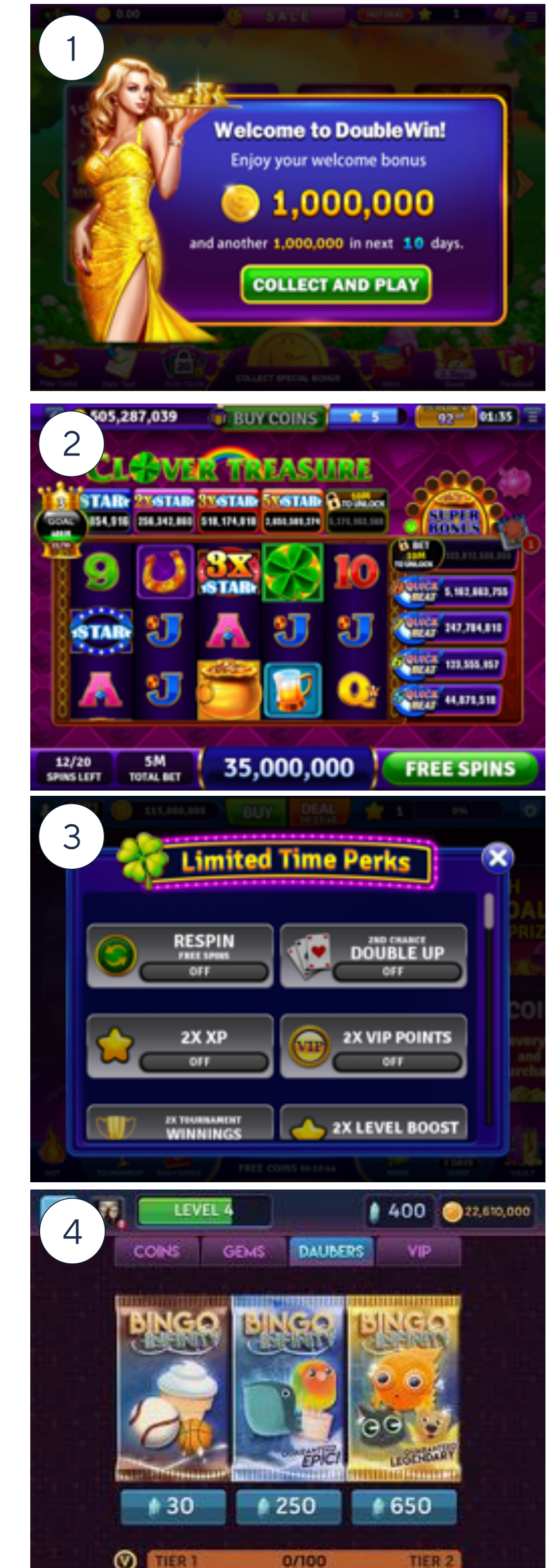
REVENUE

Double Win Casino was launched on 10/18/18, Tycoon Casino on 10/20/18, Jackpot Mania on 10/26/18, and Bingo Infinity on 11/10/18. Double Win Casino and Tycoon Casino are currently averaging slightly over \$10K daily in iOS U.S. revenue.



TEARDOWN

App	Publisher	Notable Features	Description
Double Win Casino	Avid.ly	<ul style="list-style-type: none"> New User Flow New User Drip (1) 	<ul style="list-style-type: none"> The lobby, machines, features, and quests are all very similar to Slotomania's.
Tycoon Casino	Triwin Games	<ul style="list-style-type: none"> New User Flow House Prize Secret Gift Misc. Features (2) 	<ul style="list-style-type: none"> The features are very similar to DoubleUp Slots and Fast Fortune Slots. The machines, lobby, big win flows, and spin to win event meter are influenced by House of Fun.
Slots Casino Jackpot Mania	Grande Games	<ul style="list-style-type: none"> New User Flow Perks (3) Watch to Earn 	<ul style="list-style-type: none"> The features are similar to DoubleUp Slots and Fast Fortune Slots with influence also from Slotomania and House of Fun. Players can purchase and activate accelerators, like 2x XP and 2x VIP points.
Bingo Infinity	Uken Games (acquired by Jam City)	<ul style="list-style-type: none"> Boost Daubers (4) Bonus Game Stage Mastery 	<ul style="list-style-type: none"> Players choose between manual (2 cards) and auto-daubing (15 cards). Players can compete on a leaderboard, complete collections, trigger boosts and mini-games during play, and master levels.



Additional Information Online

- Review and bookmark the full list of [top 100 grossing apps by release date](#)

EXTENDED ECONOMY

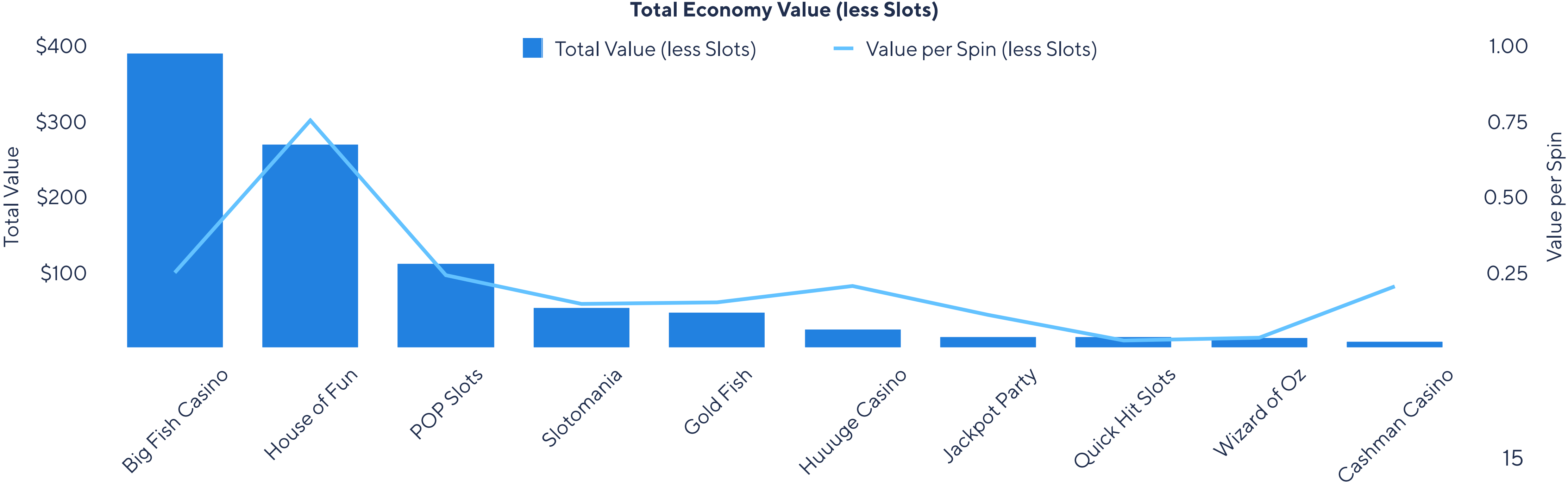


ECONOMY INFLOW (LESS SLOTS)

Apps targeting players with strong motivations outside of the thrill of winning should test more generous early economies. The goal is to increase early retention (potentially at the cost of early monetization) to keep more players in the game and for longer. This system will give the *Product team* more opportunities to monetize players ... and adjust the overall strategy in response to ever-increasing CPIs.

Product Insights

- Player personas that should receive more generous early economies: *Daydreamer Denise*, *Sensation Serena*, and *Fame Frank*.
- This approach is best suited for companies who can afford longer time horizons for Return On Acquisition Spend (ROAS).
- *Value per Spin (less Slots)* is the *Total Value (less Slots)* given to players by L25 divided by the *Number of Spins* required to reach and complete L25.

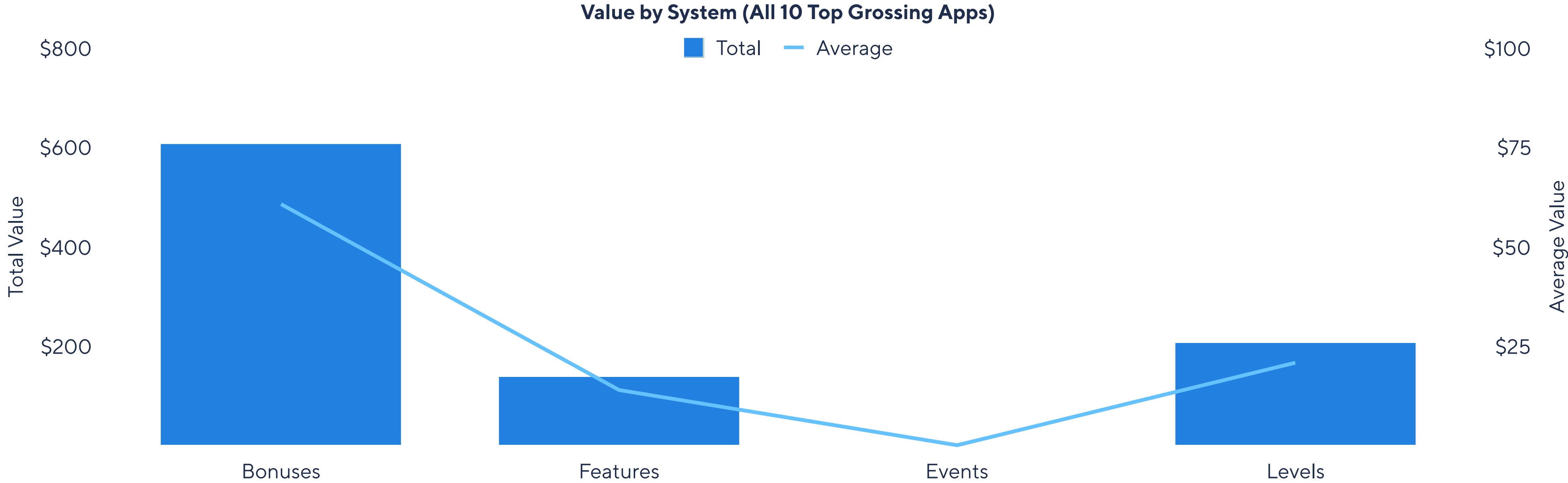


BONUS INFLOW

Players are more experienced with games and need less time to ramp up in the game. Therefore, consider shifting a player's focus (using the economy outflow) to the features and events ... and away from the bonuses. This will help differentiate your app more clearly to new users and align the User Acquisition team's marketing message with the player experience.

Product Insights

- For example, if the User Acquisition team's message is about the collection system of the app, then draw a player's attention to collections by increasing the value players receive from that feature early in the game.

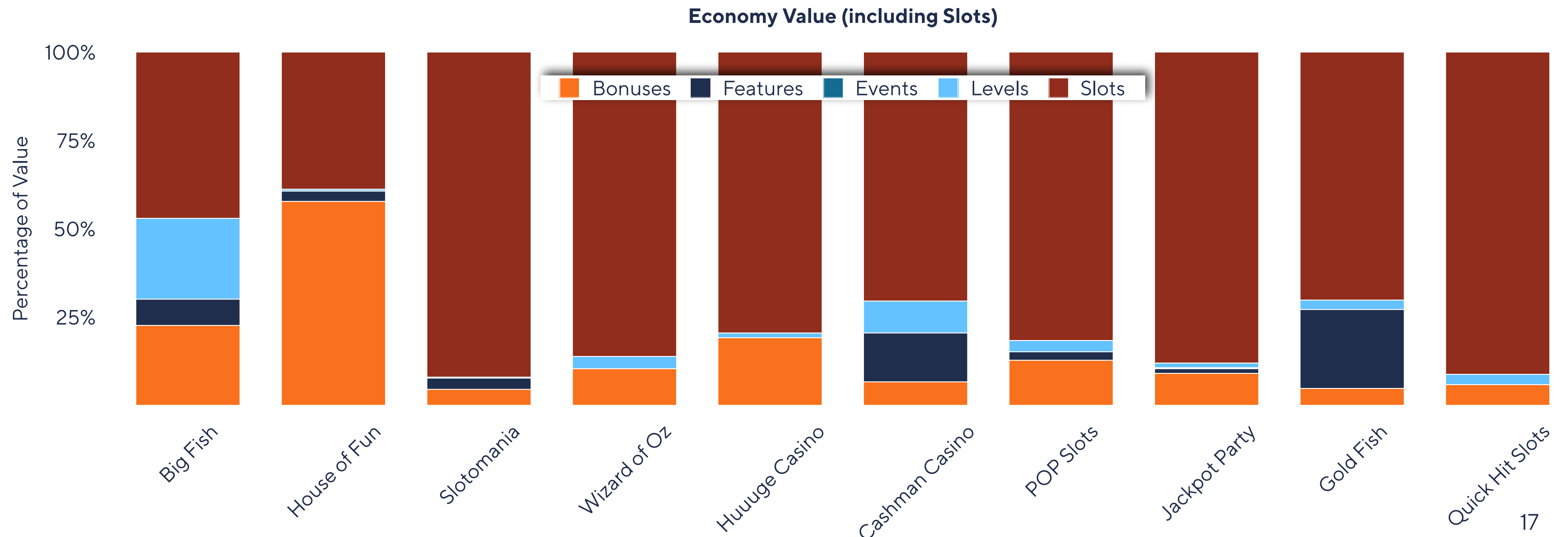


ADDITIONAL RESOURCES

Go online to download the extended economy analysis (L0-25) of 10 top grossing Casino apps. This spreadsheet details a player's experience for the first week, and includes all outflows and inflows of the economy ... as well as bets, balances, and content unlocks.

Additional Information Online

- Download the [Extended Casino Economy](#) spreadsheet (L1-25)
- Download the [New User Casino Economy](#) spreadsheet (L0 or install economy)



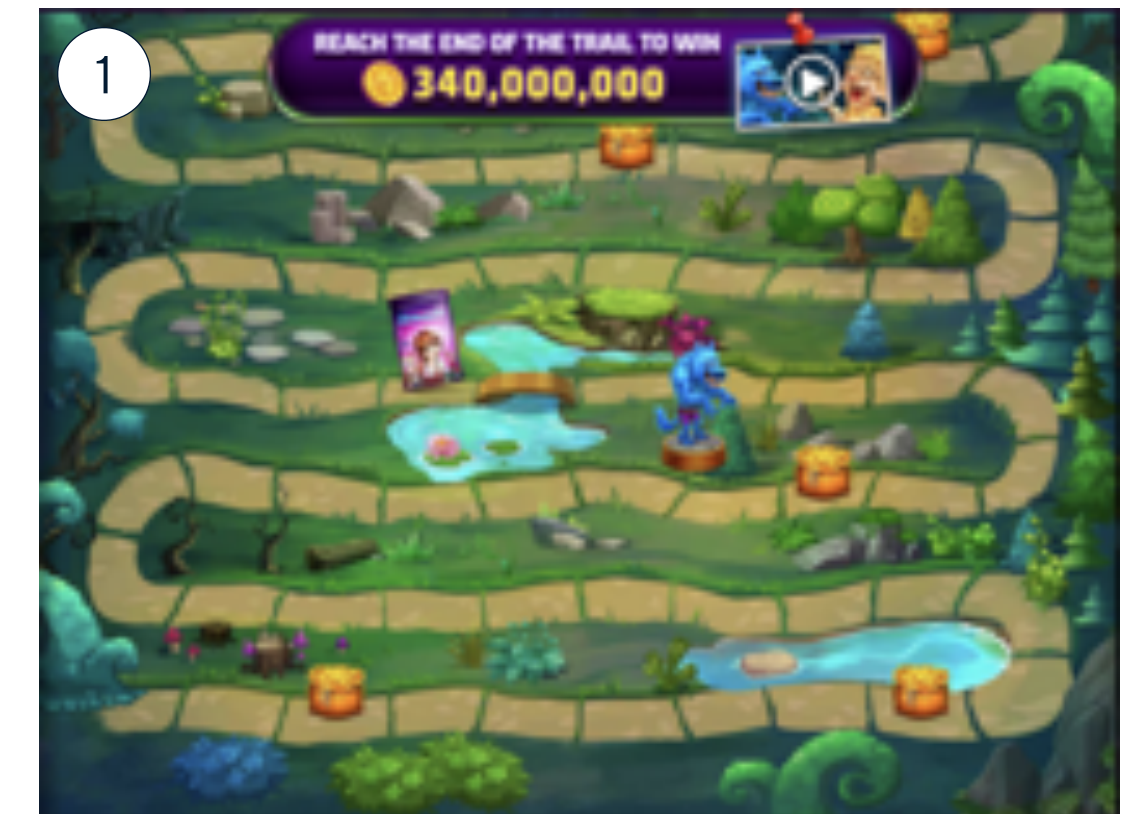
MARKET WATCH



3/15/19 - 4/14/19

NOTABLE RELEASES I

App	Full Library	Key Moment	Description
Slotomania	Sloto Tales	Completing the Tale	<ul style="list-style-type: none"> Winning spins > fills a progress meter > earns a wheel spin > advances <i>Wolfie</i> on a game board. Landing on a <i>Doctor</i> tile triggers a mini-game within the mini-game (1).
	SlotoCards Bingo	SlotoCards Bingo Tutorial	<ul style="list-style-type: none"> Collecting <i>Slotocards</i> > fills bingo lines or a card.
Bingo Blitz	Bingo Journey	Journey Instructions	<ul style="list-style-type: none"> Collecting <i>Journey Stars</i> from select <i>Cities</i> > fills a meter > completes a <i>Milestone</i> (2).
WSOP	WSOP Vegas Guest List	Vegas Guest List Tutorial	<ul style="list-style-type: none"> All inclusive trip for two to Las Vegas for 10 random winners drawn over 10 days. Players earn tickets by purchasing coins, spinning a mega bonus, completing event-related giveaways, and ranking or leveling up in clubs (3).
Caesars Slots	High Roller's Lounge	Ultimate Jackpot	<ul style="list-style-type: none"> New lounge exclusively for players L500+ and with a minimum balance of 1B coins. Includes a mystery jackpot feature called <i>The Jackpot Arena</i>.



NOTABLE RELEASES II

App	Full Library	Key Moment	Description
POP Slots	Deep Sea Treasure	Jackpot Win and Upgrade	<ul style="list-style-type: none"> Spinning > fills a progress bar > unlocks a chest > triggers a pick'em mini-game. In the pick'em, <i>Pearls</i> earn coins, <i>Keys</i> unlock a chest, and an empty <i>Clam</i> ends the game (1).
Quick Hit Slots & 88 Fortune Slots	Vegas Venture	Scratch Ticket	<ul style="list-style-type: none"> Spinning in select machines > collects <i>Scratch Tickets</i> > uncovers <i>Keys</i> and <i>Diamonds</i>. <i>Diamonds</i> pay for exclusive rewards, and <i>Keys</i> open <i>Vaults</i> for rewards and <i>Tickets</i>. <i>Tickets</i> give a chance to win a trip to Las Vegas.
Quick Hit Slots	Dragon Master Challenge	Hatching the Dragon	<ul style="list-style-type: none"> Collecting special milestone symbols > fills a meter > grows a <i>Dragon</i> (2).
Zynga Poker: Texas Holdem	Tournament Center	Spin & Win Tournament	<ul style="list-style-type: none"> Three player mode in the <i>Tournament Center</i>. The payout is determined by a wheel (3).
Hit It Rich	Benefits Increase	Hit It Richer! Tutorial	<ul style="list-style-type: none"> Leveling up now offers larger jackpots, higher max bets, increased purchase multipliers, and bigger rewards.



APPENDIX



PREMIUM PARTNERSHIPS

Liquid and Grit partners with these premier market research and analytics companies to infuse our reports with the most relevant and detailed gaming user personas, data, and statistics available.

Quadrant Strategies	Kinrate Analytics	Sensor Tower
<p>Market Research</p> <p>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>	<p>Player Personas</p> <p>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 of economists, psychologists, game scholars, and data scientists.</p>	<p>Mobile App Store Intelligence</p> <p>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

L&G SLOTS PERSONAS

A survey of 1,299 participants from the U.K. and U.S. were recruited to respond. The data formed patterns of game choices, slots preferences, and playing habits ... producing five distinct personas.

	Demographics*				
	Fame Frank	Money Mike	Daydreamer Denise	Gambler Gail	Sensation Serena
Size	21%	22%	27%	19%	12%
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 are representative of the strength of each player persona.

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- Steve Jobs

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