



LIQUID&GRIT

Casino Report

Competitive Research and Actionable Product Recommendations

EXECUTIVE SUMMARY



"[We took] some regular old ugly rocks and we put them in the can [rock grinder] with a little bit of liquid and little bit of grit powder, and we closed the can up. And he turned this motor on and he said, come back tomorrow. And I came back the next day, and we opened the can. And we took out these amazingly beautiful polished rocks."

- Steve Jobs' metaphor for passionate product teams

Revenue Drivers

Lotsa Slots' revenue increased the past two times a quest event went live. The quest event is part of an elaborate Live Ops system that helps players complete *Stamp* collections, get showcased in a *Hall of Fame*, earn coins, win wheel spins, and more. More complex Live Ops systems are trending in Casino apps. Review this section to better understand how to construct a Live Ops system that triggers all four Core Motivations.

Revenue spiked in myKONAMI Slots after the release of a sale that unlocked a new slots machine. Although the majority of the revenue was likely driven by the coin discount, non-coin purchase sweeteners are critical to strong repeat transactions. Check out the Expert Insights for information on a breakout Puzzle app, Polysphere. This app has excellent user flows to generate strong subscription revenue ... a monetization opportunity in Casino.

App Deconstruct

An updated deconstruct of Coin Master is included in this report with a downloadable Coin Master Extended Economy spreadsheet. Coin Master will help *grow* the Casino market. To capitalize on this new innovation, predict your competitor's next move and target a genre that aligns well with your core audience (instead of going after Adventure).

Market Watch

WSOP released a Facebook group for VIPs; Cashman Casino released missions; and DoubleU Casino released quests. Also, check out myVegas Slots' mini-game event that is only unlocked with a purchase and Pokerist's new chat feature.

Liquid and Grit Announcement

The Data tab is now live in the Feature Database. This new tool allows you to understand the investment strategies of competitors, identify upcoming trends, and check your apps output strength relative to competitors. The tool is available to all Feature Database subscribers.

Brett Nowak
CEO

TABLE OF CONTENTS

REVENUE DRIVERS	4
Quest Events	
<i>Quest King</i> in Lotsa Slots	
Purchase Events	
<i>Classy Roses Color Bloom</i> in myKONAMI Slots	
APP DECONSTRUCT	13
Coin Master by Moon Active	
MARKET WATCH	16
Notable Releases I, II, & III	
APPENDIX	20
Premium Partnerships	
Casino Product Council	
L&G Slots Personas	

MARCH

2019

REVENUE DRIVERS

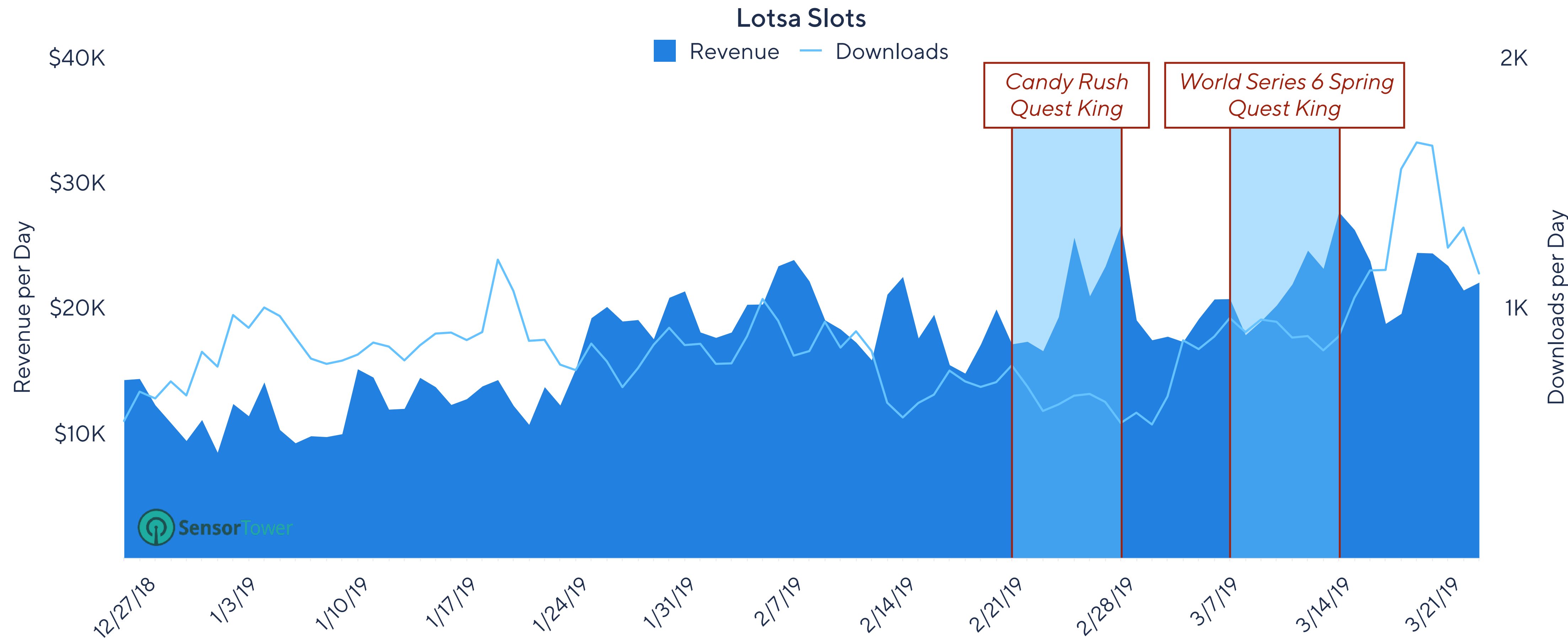


QUEST EVENTS

Quest King in Lotsa Slots

REVENUE ANALYSIS

Lotsa Slots' revenue spiked after the latest releases of the *Quest King* events. Revenue was up +11% WoW and downloads -2% WoW for the *Candy Rush* theme ... and +7% WoW in revenue and +30% in downloads for the *World Series 6 Spring* theme.



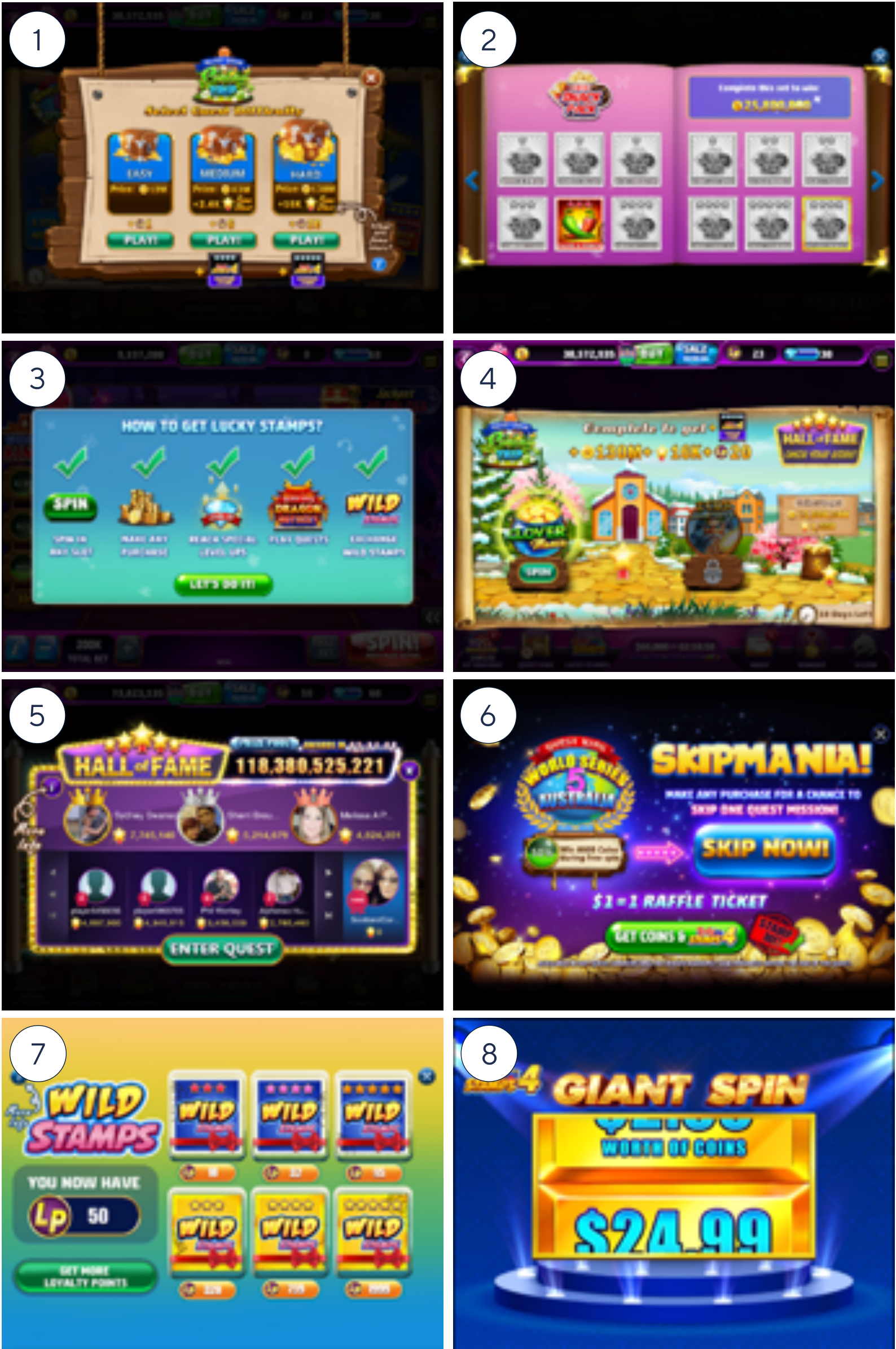
*Headline and graph data is iOS U.S. only
WoW = week over week

FEATURE TEARDOWN

Lotsa Slots incorporated the *Quest King* events into a collection feature, *Hall of Fame* feature, raffle events, bonus wheel feature, and *Loyalty Points* currency.

Feature Details

- In *Quest King*, awards scale with difficulty and include coins, *Loyalty Points*, *Fame Stars*, and *Stamps* (1).
- Players use *Stamps* to complete *Lucky Stamps* sets and win coins (2).
- *Lucky Stamps* are collected by spinning, purchasing, leveling up special levels, and completing quests (3).
- As players progress along the *Quest King*, they gather *Fame Stars* (4).
- The 100 players with the most *Fame Stars* earn prizes and are showcased in the *Hall of Fame* (5).
- Additional events, like *Skipmania*, are also released during the *Quest King*.
- *Skipmania* gives a raffle entry for every dollar spent. Raffle winners skip one mission in the quest (6).
- *Loyalty Points* are earned by completing missions, making purchases, inviting friends, finishing quests, and completing other events.
- *Loyalty Points* are used to purchase *Wild Stamps*, which can substitute for any *Stamp* in a set (7).
- *Diamond Stamps* are rare and only earned by completing *Medium* or *Hard* quests, reaching levels ending in 0, filling the entire *My Missions* bar, or completing other ‘Special activities’.
- Collected *Diamond Stamps* award a *Giant Spin* of a wheel that displays the dollar value on each sleeve (8).



Additional Information Online	
Report References <ul style="list-style-type: none">• Puzzle Progression - 12/18 Casino Report• Multi-Stage Events - 1/19 Casino Report• Difficulty Options - 2/19 Casino Report	Related Features <ul style="list-style-type: none">• Choose Difficulty - Slotomania• SlotoCards 2019 Collection - Slotomania• Ace Cards - Slotomania

EXPERT INSIGHTS

Lotsa Slots’ Live Ops system illustrates the trend towards more complex and inter-connected features and events. In these systems, each currency should trigger a different Core Motivation ... and in turn, target a specific player persona.

Product Council Insights

- **Satisfy multiple Core Motivations.** Lotsa Slots’ system rewards *Glory* with the *Hall of Fame*, *Arousal* with the slots machines, *Escape* with the progressions and collections, and *Profit* with the coin rewards and wheel spins.
- **Associate currencies with specific Core Motivations.** In Lotsa Slots, *Fame Stars* is a currency that clearly rewards the Core Motivation *Glory*. Name your currencies, like *Fame Stars*, to describe the emotion that the currency will most often trigger.
- **Display the dollar value winnings on mini-games.** The *Giant Spin* wheel lists on each sleeve the dollar value (e.g. ‘\$24.99 worth of coins’) that players can win (see [Diamond Stamp](#)).
- **Build on existing successes.** The *Lucky Stamps* and *Quest King* system is influenced by Slotomania’s *SlotoQuest*, *SlotoCard*, and *Ace Card* ... with some additions and modifications, like the *Hall of Fame* and raffle events.

Player Persona Data

- **Target Personas:** All
- **Core Motivations:** All

Additional Information Online

- More images of the [Quest King](#), [Hall of Fame](#), [Loyalty Points](#), and [Diamond Stamp](#)
- Go here for all [Quest Events](#) in Casino
- Go here for all [Quest Features](#) in Casino
- Check out [Quest Events](#) and [Quest Features](#) in Puzzle
- For specific quest events in Puzzle, review [Valentine's Day Chest Quest](#) in Fishdom and [Birthday Adventure](#) in Angry Birds 2

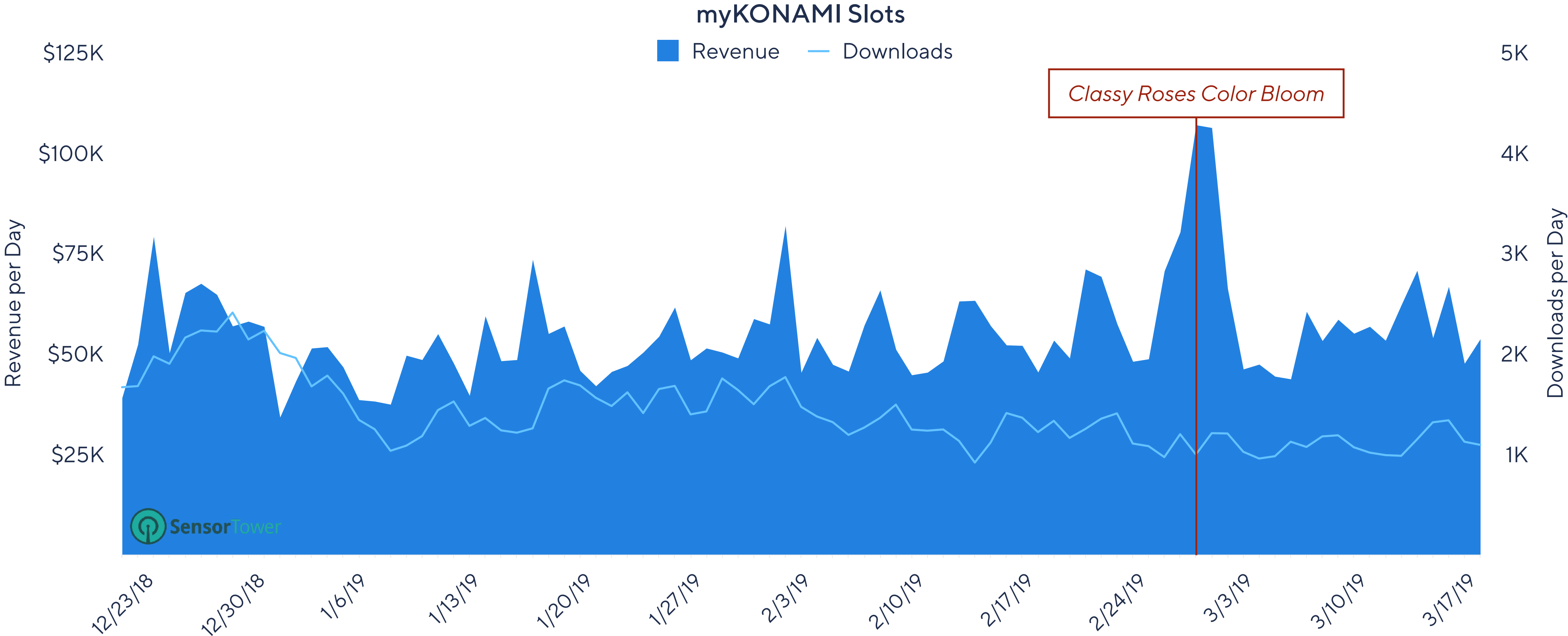
Core Motivations
Glory <ul style="list-style-type: none">• Feeling important and glamorous• A great night out ... just like a real-life casino trip• The desire to master gaming skills in front of others• Enjoying challenges and wanting others to envy gaming abilities and success
Arousal <ul style="list-style-type: none">• Feeling enjoyment, entertainment, and excitement• Appreciating the rhythm and audiovisual effects• Effortless way to feel awarded and experience a high• Strong emotional arousal and high stimulation
Escape <ul style="list-style-type: none">• A replacement for everyday concerns and anxiety• Relieving stress and pressure• Motivating activity when bored• A sleep-alternative
Profit <ul style="list-style-type: none">• The feeling of gaining money• Wanting to make a profit, get rich, and win prizes and rewards

PURCHASE EVENTS

Classy Roses Color Bloom in myKONAMI Slots

REVENUE ANALYSIS

The three-day *Classy Roses Color Bloom* purchase event in myKONAMI Slots spiked revenue +40% 3Do3D.



*Headline and graph data is iOS U.S. only
3Do3D = three days over three days

FEATURE TEARDOWN

myKONAMI Slots released a \$39.99 package that was 4.17x better value than the buy page ... *and* unlocked a new machine with purchase. The value of this sale likely drove the majority of the revenue growth.

Feature Details

- A new machine was released locked to all players (1).
- Players had to make a \$39.99 purchase to unlock the machine, get chips, and receive *VIP Rewards* (2).
- The sale provided 4.17x more chips-per-dollar than the buy page at the same price point (3).
- Three days after the initial release, the machine was unlocked to all players (4).

Report References

- [Daily Streak Events](#) - 3/18 Casino Report
- [Unlock Special Packages & Surprise Bonuses](#) - 7/17 Casino Report

Related Features

- [Elite Membership](#) - Bingo Blitz
- [Win Early Access](#) - Cashman Casino
- [Unlock with Purchase](#) - Jackpotjoy



EXPERT INSIGHTS

Continue to add non-chip value to purchases, making payers *feel* like they are receiving a lot of value with every purchase (and giving them more reasons to transact again). Build a longer-term plan towards releasing a subscription package to generate a new, consistent revenue stream.

Product Council Insights

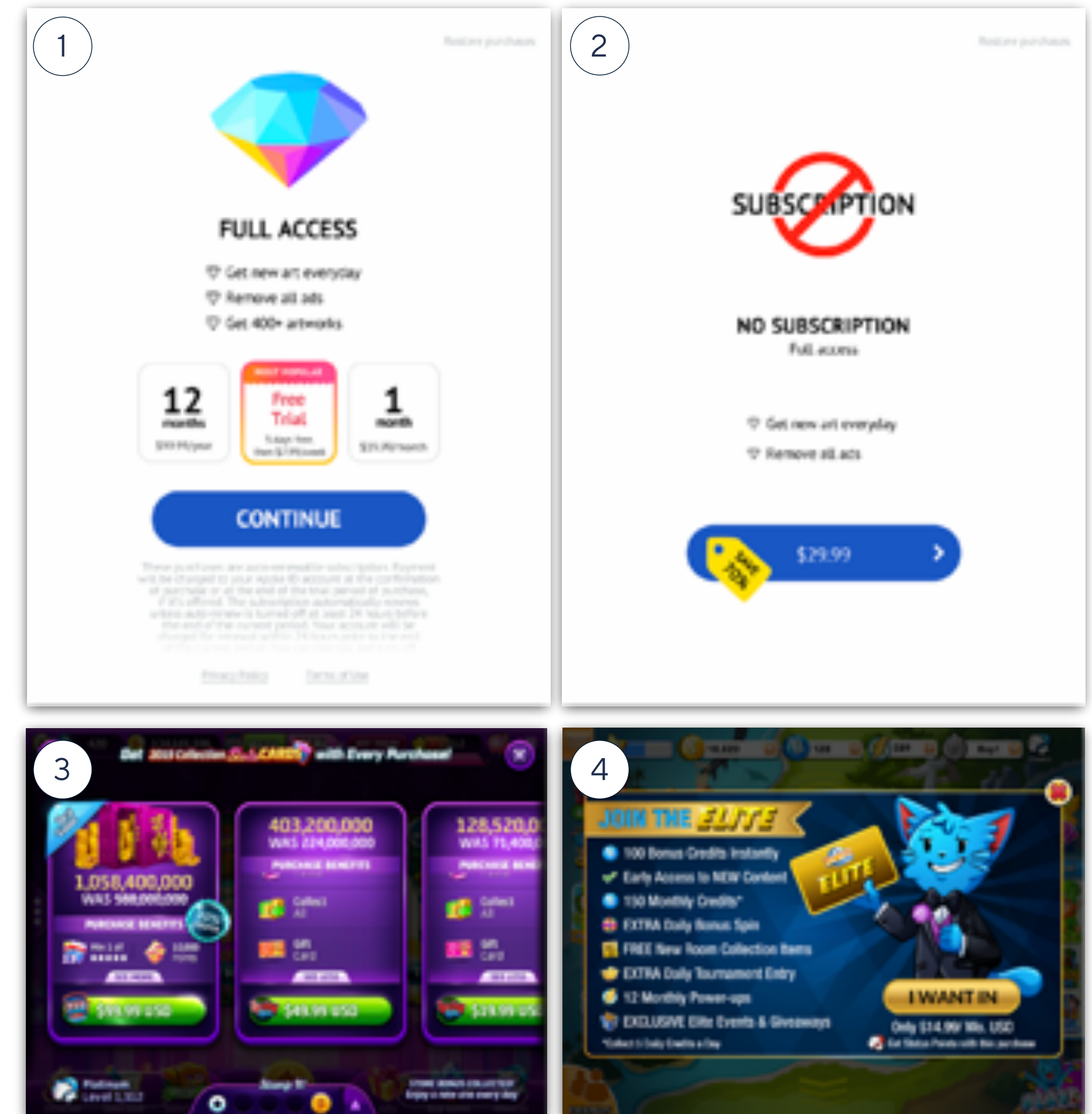
- [Review closely the new and return user flows in Polysphere](#). Polysphere is a breakout app in Puzzle with well-integrated purchasing flows that drive strong subscription revenue (1 & 2).
- [Add and showcase multiple items upon purchase](#). In Slotomania's new [Buy Page Update](#), players can swipe through all the purchase-based benefits (3).
- [Make a longer-term strategy towards subscriptions](#). The best example of subscription revenue in Casino is Bingo Blitz's [Elite Membership](#). To offer players this kind of value, plan long-term by adding one element and currency at a time ... eventually leading to a similar offer (4).
- [Include grind, loyalty, and purchase-to-unlock options](#). In Cashman Casino, players can spin to unlock or purchase a *Double Deal* offer. Big Fish Casino content unlocks based on [VIP](#) level. Include all three options to reward players with high engagement, retention, or monetization.

Player Persona Data

- **Target Personas:** Money Mike, Sensation Serena
- **Core Motivations:** *Profit* (Money Mike), *Arousal* and *Profit* (Sensation Serena)

Additional Information

- More images and videos on [Classy Roses Color Bloom](#)
- Polysphere [New User Flow](#) and [Return User Flow](#) (Puzzle app)
- [Polysphere Deconstruct](#)
- Review all Casino [Purchase Features](#) and [Currency Features](#)



APP DECONSTRUCT



Coin Master
(originally posted online 3/5/19)

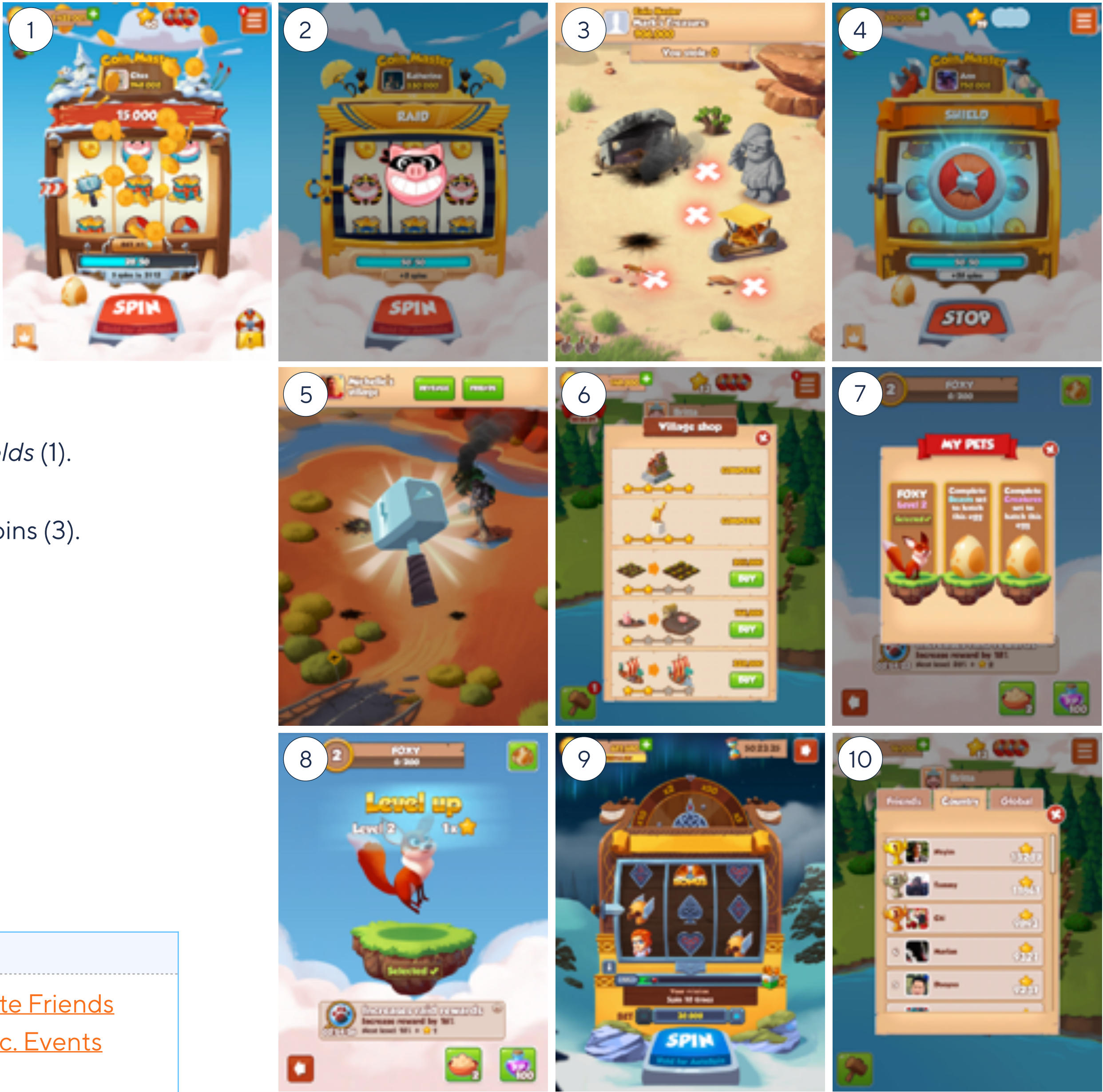
APP TEARDOWN

In Coin Master, players grow their *Village* by spinning a slots machine that awards currency, spins, and protection. Certain spins trigger *Attacks* and *Raids*. As players progress, they unlock missions and a *Pet* that awards boosts.

Feature Details

- Players receive five slots machine spins every hour to earn coins, spins, and *Shields* (1).
- Spinning also triggers *Attacks* and *Raids* on other players (2).
- During *Raids*, players play a pick'em game for a chance to steal other players' coins (3).
- During *Attacks*, players reveal coins or a *Shield* in a pick'em game (4).
- *Shields* protect a player's *Village* from *Attacks* (5).
- Players use coins to upgrade *Village* items for *Stars*.
- Collecting a certain number of *Stars* levels a player up (6).
- Completing certain *Card Collections* unlocks a *Pet* (7).
- Each *Pet* possesses an upgradable boost (8).
- Events and challenges unlock at *Village 4*.
- Players can complete missions, like 'Spin 10 times' (9).
- The leaderboard is based on total *Stars* earned (10).

Additional Game Features Online			
<ul style="list-style-type: none">• New User Flow• Misc. Features• Currency	<ul style="list-style-type: none">• Watch to Earn• Bonuses• Leaderboards	<ul style="list-style-type: none">• Gifting• Collections• Pets & Boosts	<ul style="list-style-type: none">• Invite Friends• Misc. Events



EXPERT INSIGHTS

Coin Master is a win for the Social Casino market. This app introduces new players to simple slots machines ... increasing the slots mobile market and taking market share away from Adventure. Anticipate the competition's next move to target the right open market.

Product Insights

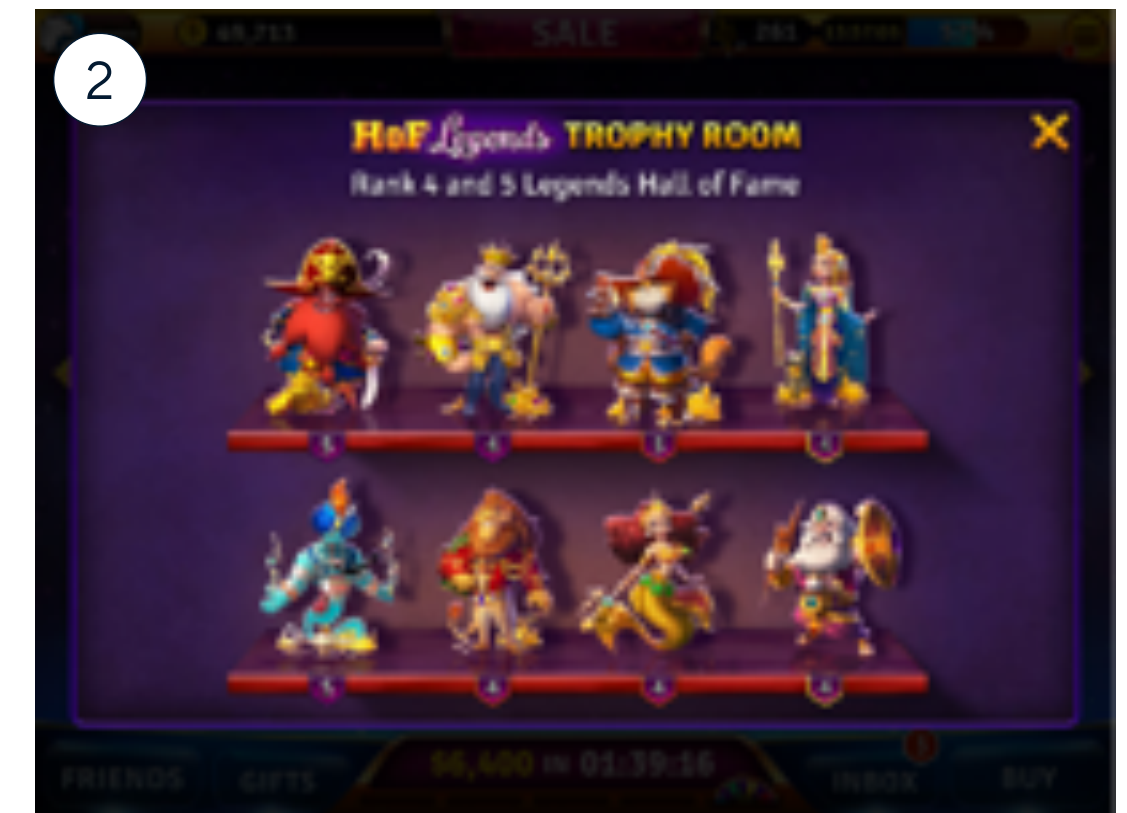
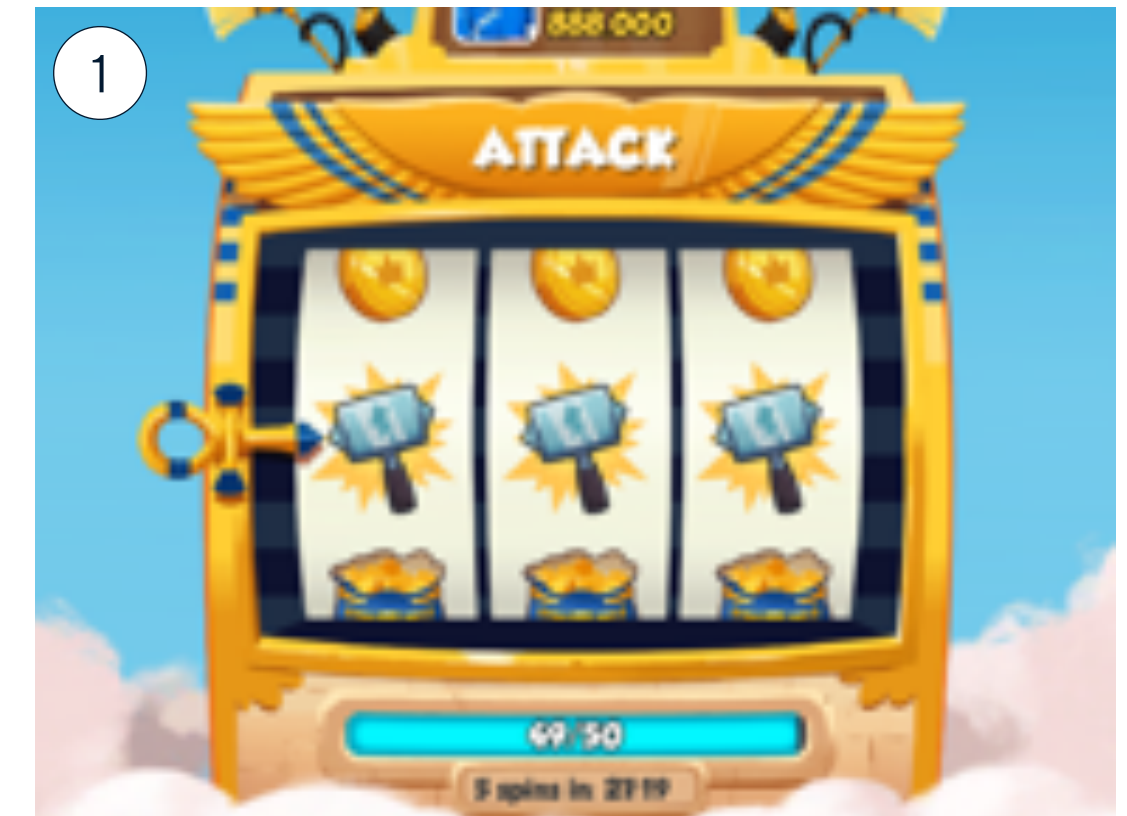
- **Coin Master will grow the Casino market.** Coin Master is introducing new players from Adventure to slots machines. Eventually, some of these players will want more sophisticated machines ... and will download Casino apps (1).
- **Target new apps in new genres (not necessarily Coin Master in Adventure).** Coin Master is an established app and Playtika is already competing with Coin Master with their newly-acquired app, Pirate Kings. To execute, implement the Focused Market Entry Strategy ([more info](#)).
- **Coin Master will not disrupt Casino.** The features, events, and slots machines in Casino *are* innovative, extremely difficult to replicate, and very well made (2).
- **Continue to invest in existing apps.** Apps that start out well, like Coin Master, can eventually become great apps (Coin Master was hard-launched in May 2016).
- **Experiment with Influencer Marketing.** Deconstruct of Fun highlights the impact of Influencer Marketing campaigns on Coin Master's downloads. As Eiler's & Krejcik Gaming pointed out, make sure the Influencer is age appropriate (3).

Additional Resources

- Deconstruct of Fun: [How Coin Master Disrupted Social Casino and Pocketed \\$100M](#) for game design analysis
- Eilers & Krejcik Gaming: [Coin Master: Blurring the Lines Between Casual & Casino](#) for the machine's RTP breakdown
- Lloyd Melnick: [Yes, Coin Master is Disruptive](#) for more on strategic frameworks

Economy Spreadsheets

- Download the [Coin Master Extended Economy](#) spreadsheet for details on the D0 to D7 economy



MARKET WATCH



2/15/19 - 3/14/19

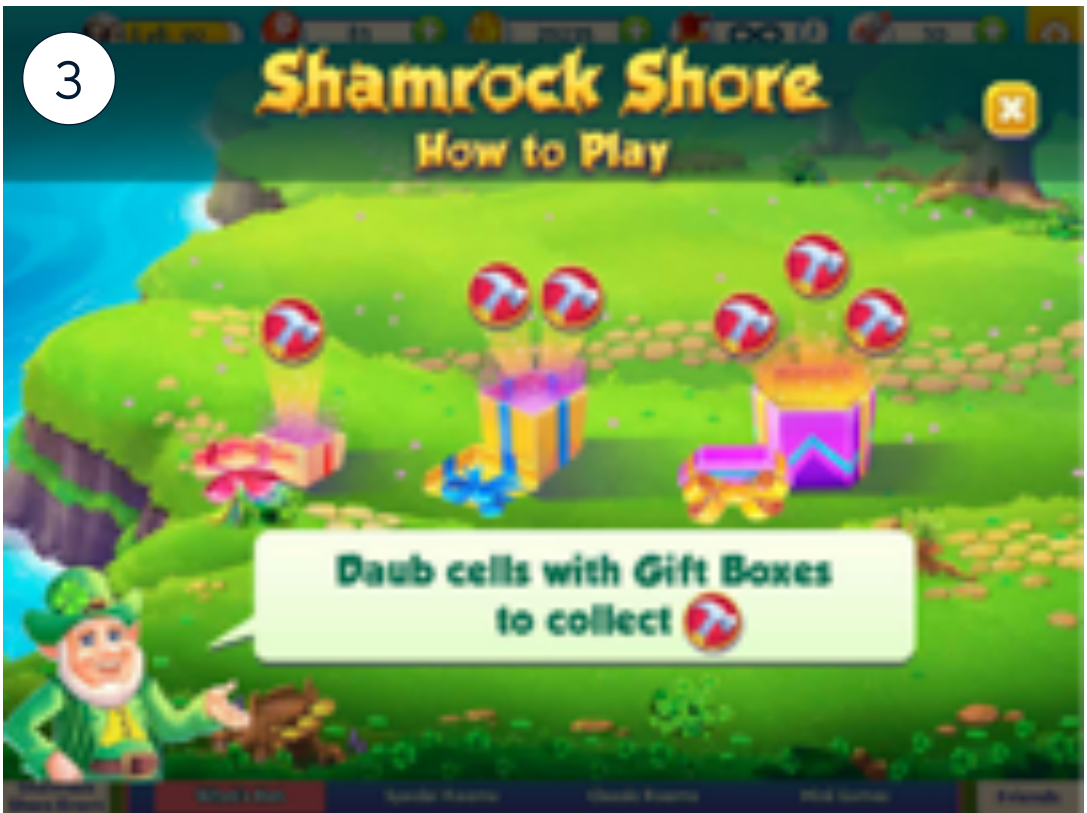
NOTABLE RELEASES I

App	Full Library	Key Moment	Description
WSOP	The Lounge WSOP	The Lounge	New Facebook community group that offers VIP benefits, exclusive events and content, and group chat (1).
Cashman Casino	Cashman Missions	Missions	Players complete eight missions before time runs out to earn coin prizes (2).
Heart of Vegas	Road to Riches	Spin to Collect	Players complete <i>Adventures</i> by spinning in any machine to catch <i>Leprechauns</i> , collect <i>Lucky Charms</i> , and reach a <i>Pot of Gold</i> .
DoubleU Casino	Treasure Quest	Quest Game Board	Players fill a meter by spinning in select machines to earn a spin on a wheel. The wheel lands on a number that moves a game piece along a board ... to collect coins and treasures (3).



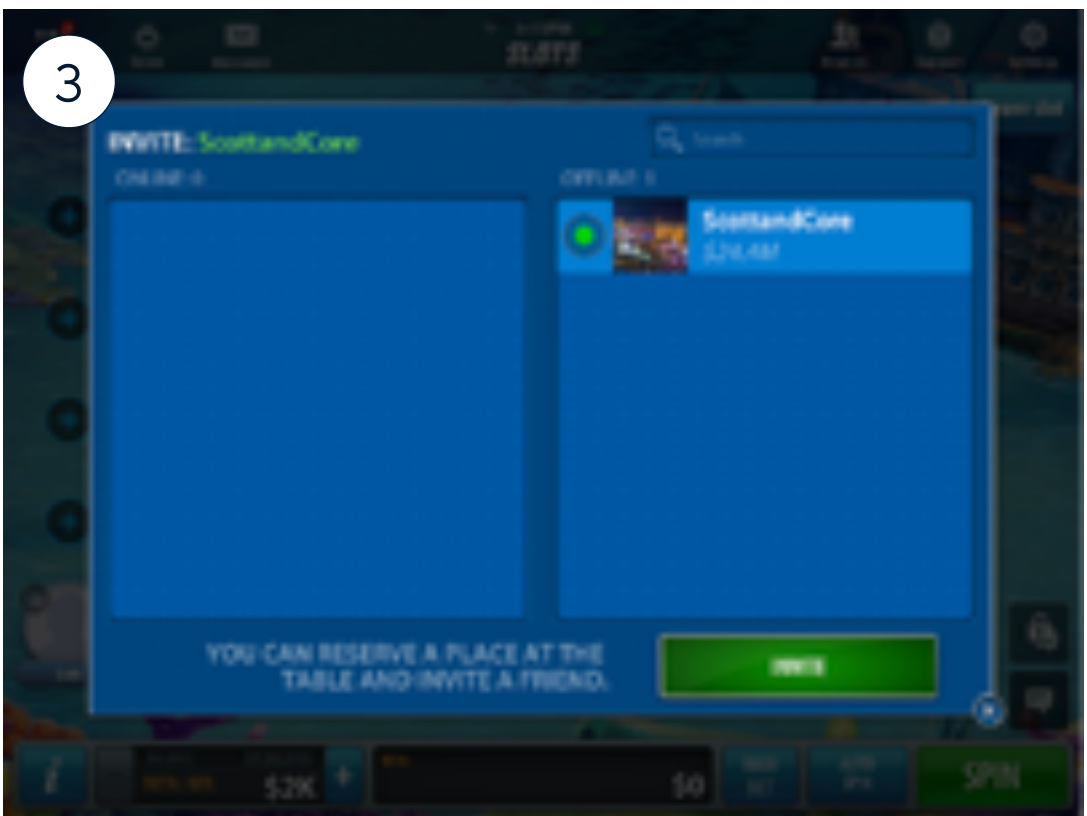
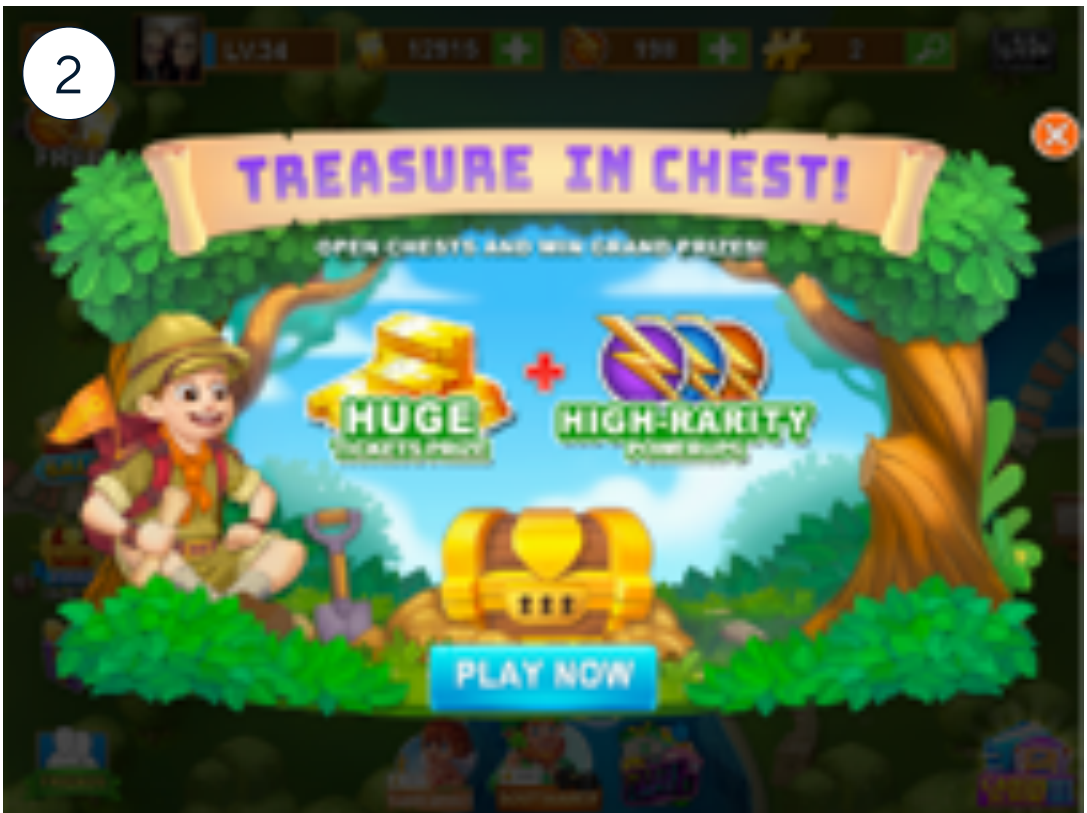
NOTABLE RELEASES II

App	Full Library	Key Moment	Description
Bingo Blitz	Pick a Diamond	Scratch-Off	Players collect <i>Diamonds</i> from bingo rooms to buy scratch-offs for various prizes, including more <i>Diamonds</i> . Scratch-offs can also reveal <i>Lightning Bolts</i> that fill a meter ... to progress along a map for the <i>Grand Prize</i> (1).
myVEGAS Slots	Magic Box Purchase	Magic Hat	In a mini-game event, players open a chest to receive a coin prize ... then select a <i>Hat</i> to add a multiplier. To claim the total coins, players must make a \$19.99 purchase (2).
Bingo Bash	Shamrock Shore	Building Plots	Players daub cells with <i>Gift Boxes</i> to collect <i>Hammers</i> to start building on <i>Shamrock Shore</i> . Each completed <i>Building</i> awards chips ... with a final reward for completing a <i>Village</i> (3).



NOTABLE RELEASES III

App	Full Library	Key Moment	Description
Bingo Showdown	Tournament Rankings	Rank Rewards & Rules	Tournaments now offer a rank system based on engagement in daily tournaments (1).
Bingo Party	Treasure in Chest	Chest Collection Meter	Players daub cells with <i>Keys</i> to collect chests ... to fill a meter. Rewards are earned at three, nine, and 20 chests collected (2).
Pokerist	Slot Room Update	Slot Chat	Chat feature for slot rooms that allows players to invite friends to tables, reserve seats, and chat (3).



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

CASINO PRODUCT COUNCIL

To increase the value of the Product Council Insights, industry-leading mobile gaming consultants analyze the Revenue Drivers to provide their knowledge and advice. Liquid and Grit then incorporates the best recommendations into the Reports.

Jay Jodway	Florian Ziegler
<p>Mobile Products Consultant</p> <p>LinkedIn Profile</p> <p>Prior to starting his own consultancy, Jay was <i>VP of Product</i> at GREE International and <i>Senior Director of Product Development</i> at Kabam.</p> <p>Jay spent over four years at Kabam, going from <i>Associate Product Manager</i> to <i>Senior Director</i> in a very short time.</p> <p>At Kabam’s Beijing office, Jay scaled the studio to over \$1B in revenue.</p> <p>Jay has helped manage The Hobbit (Kingdoms of Middle Earth), Kingdoms of Camelot, Crime City, Marvel Contest of Champions, Lord of The Rings, and The Godfather.</p>	<p>Consultant in Mobile Gaming</p> <p>LinkedIn Profile</p> <p>After over a decade of making games, Florian now advises game studios and companies on improving their game products through his own consultancy, Lava Lake Games Consultancy.</p> <p>Before launching his own consultancy, Florian worked at Electronic Arts on flagship titles such as, Need for Speed: No Limits. He also spent time at King as a <i>Principal Designer</i>.</p> <p>At Mind Candy, he was the <i>Lead Game Designer</i> on titles that include the mobile hit, World of Warriors. This gained an Apple's Editor's Choice Award and scaled the charts to the No. 1 game position in most major markets.</p>

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.

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

– Steve Jobs

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