



LIQUID&GRIT

CASINO REPORT

Competitive Research and Actionable Product Recommendations

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APRIL

2020

BREAKOUT APP

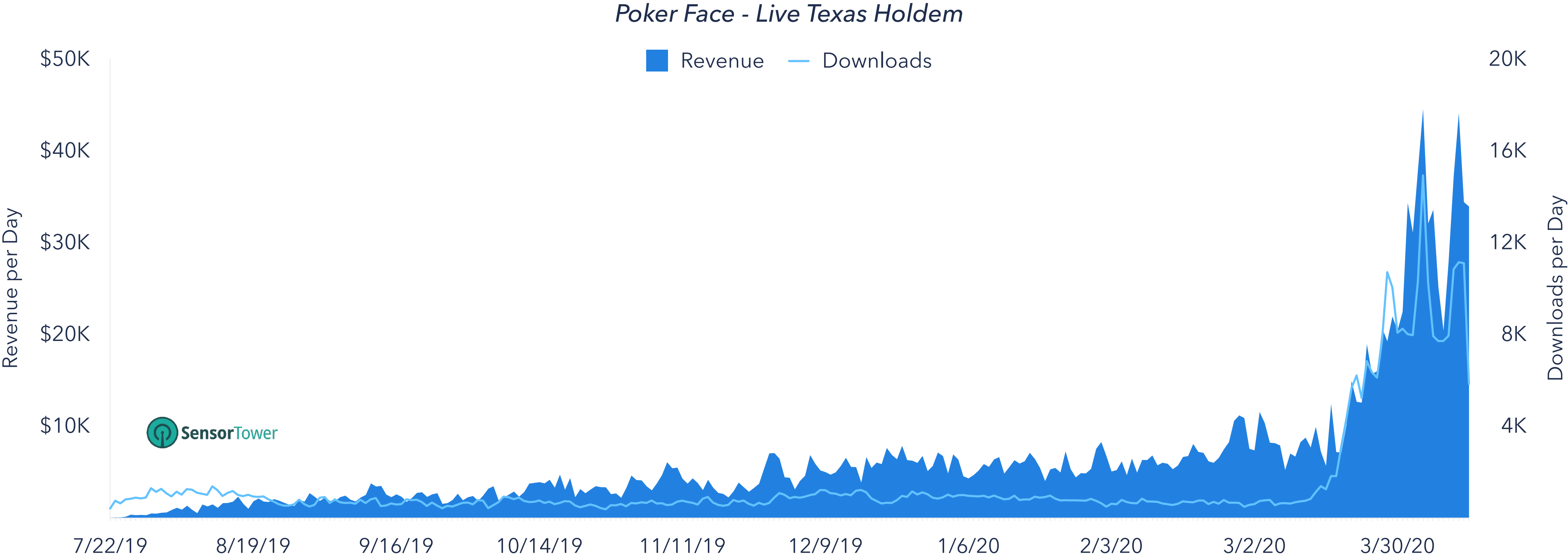


CASINO > GAME

***POKER FACE - LIVE TEXAS HOLD'EM* BY COMUNIX LTD**

REVENUE ANALYSIS

March revenue and downloads for *Poker Face - Live Texas Holdem* spiked +64% and +390% MoM, respectively, leading to \$11,215 in average daily revenue and 3,214 average daily downloads. This rapid growth coincided with the implementation of social distancing measures in the U.S. and is potentially attributable to the app's built-in video chat feature.



Graph data is iOS U.S. only. MoM = Month over month.

APP TEARDOWN

Poker tables include built-in group video chat. Players are rewarded for inviting and connecting with friends.

App Details

- New players must:
 - Verify their phone number via SMS code.
 - Allow access to their camera and contacts.
- Each poker game includes a group video chat that positions players in their seats at the table (1).
- Players can choose between playing with friends or playing at worldwide tables (2).
- Players are rewarded for connecting with contacts and inviting friends to the app (3).
- Go [here](#) to see more features.

Launch Information

- Launch: 9/1/18
- [iOS App Store](#)

Group video chat apps *Brunch* and *Houseparty*—both of which include options for gaming—have also seen rapid growth following social distancing measures.

Beginning on 3/16, *Houseparty*'s revenue was +1,253% and downloads were +1,805% MoM. *Brunch*'s downloads grew +2,054% during the same period, albeit from a much smaller starting base.



REVENUE DRIVER



CASINO > EVENTS > MINI-GAMES

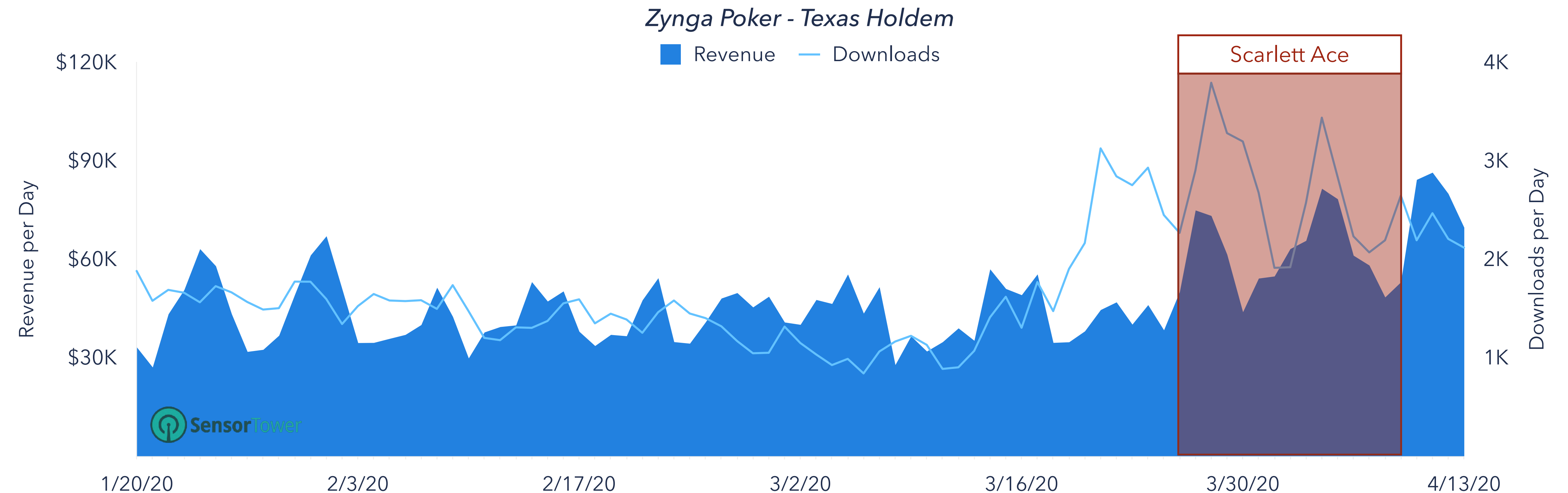
PLAYER-DIRECTED CHALLENGE EVENT

Scarlett Ace in Zynga Poker - Texas Holdem

REVENUE ANALYSIS

During the Scarlett Ace event, *Zynga Poker - Texas Holdem*'s revenue was +42% and downloads were +35% 2Wo2W.

Releases
3/19-4/7: Mega Fast Cash competition event
3/26-4/9: Scarlett Ace challenge event
• 3/26-4/3: Macau vs. Paris (image)
• 4/2-4/9: Monaco vs. Holland (image)
4/1:
• Version update
• \$0.99 Starter Pack Super Deal IAP +1 to #9
4/2: \$0.99 Mystery Chip Bag IAP +1 to #9
4/3: \$0.99 Starter Pack Super Deal IAP +1 to #9



Graph data is iOS U.S. only. 2Wo2W = Two weeks over two weeks.

FEATURE TEARDOWN

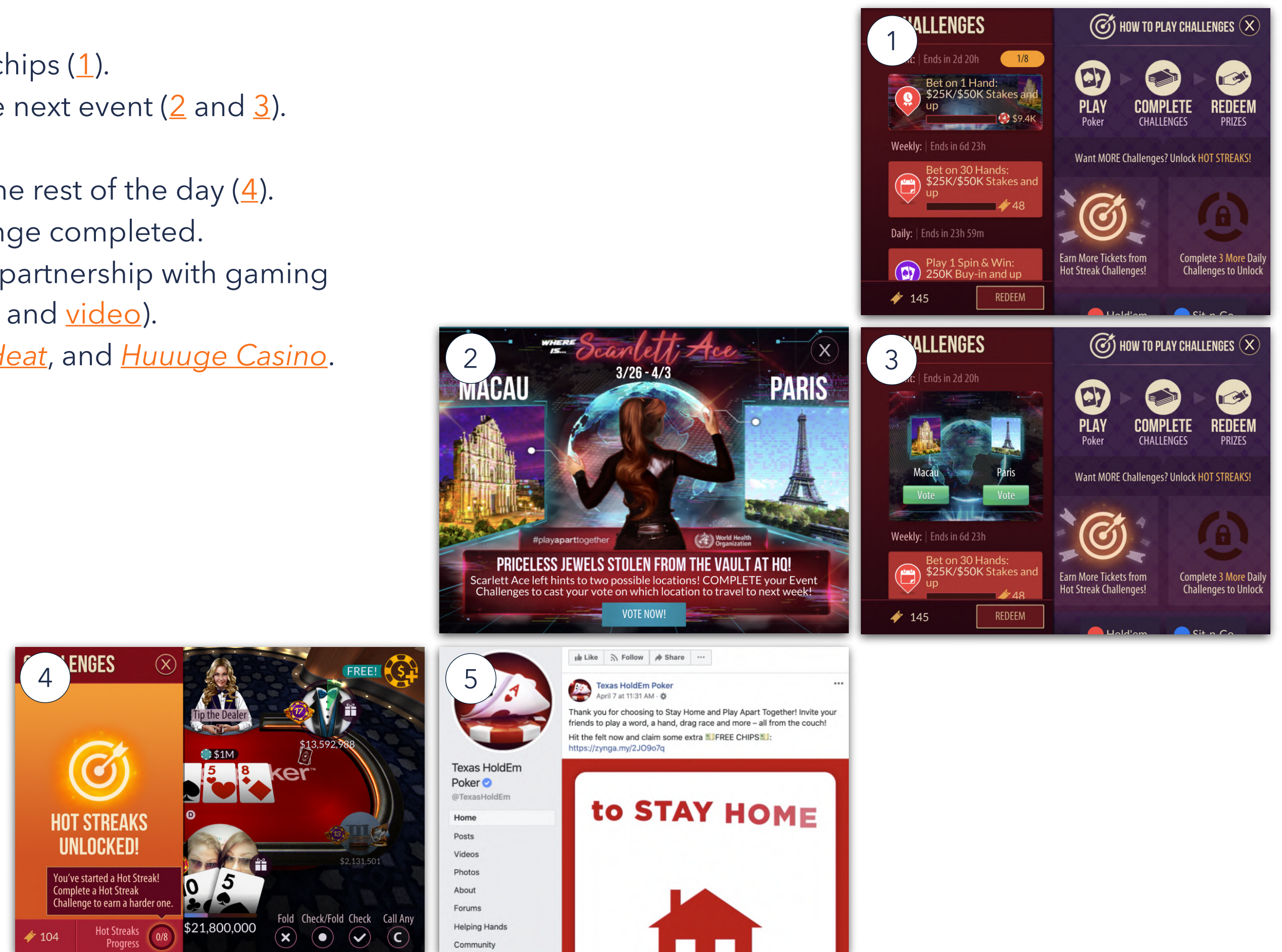
Daily, weekly, and event challenges award prizes. Players who complete event challenges can vote on the location of the next event.

Details

- Players complete daily, weekly, and event challenges to earn tickets and chips (1).
- Completing event challenges allows players to vote on the location of the next event (2 and 3).
- Event challenges award a share of a community prize.
- Completing all three daily challenges unlocks Hot Streak challenges for the rest of the day (4).
 - Hot Streak challenges increase in difficulty and rewards for each challenge completed.
- This event is part of the World Health Organization's [#PlayApartTogether](#) partnership with gaming companies to support global public health efforts related to COVID-19 (5 and [video](#)).
 - Other #PlayApartTogether events include bonuses from [WSOP](#), [Poker Heat](#), and [Huuuge Casino](#).

Additional Information

- See the [Scarlett Ace](#) Library for more images and videos.



PRODUCT INSIGHTS

When planning new events and content, give players a voice through in-game votes and by listening to social channels. Randomize challenges using handcrafted building blocks to maintain quality.

Research Insights

- **Give player communities agency both inside and outside the game to increase engagement and satisfaction.** By providing players the ability to vote on the setting for the next event, [Scarlett Ace](#) increases player agency and helps developers determine what players most want to see next. *Fortnite*'s Community Choice events work similarly by allowing players to vote on what items to bring back to the in-game shop,¹ while [Cake Day Bash](#) in *Hit It Rich!* enters players in a sweepstakes for voting on their favorite machines (1).
- **Retain high achievers with extra challenges that use a mixture of randomized and authored components.** Zynga *Poker - Texas Holdem*'s randomly generated Hot Streak Challenges unlock after players have completed all daily challenges, ensuring that even the most active players always have something to do.

Although procedural generation—i.e., creating content algorithmically instead of by hand—is often touted as the secret to unlimited gameplay, high-profile disappointments like *No Man's Sky* and *Spore* have demonstrated that endless quantities of randomized content don't necessarily lead to compelling experiences (2).⁵

On the other hand, indie success stories *Spelunky*⁶ and *Dead Cells*⁷ generate levels for each playthrough using a library of handcrafted level pieces that are combined through a process of controlled randomization. This structured approach to procedural generation gives players a new experience every time while also maintaining a high level of quality.



¹ [Fortnite 'Community Choice' test lets players vote in Item Shop](#)

² [An exemplary cross-industry collaboration example in China](#)

³ [The Small But Important Change 'Celeste' Made to Its Celebrated Assist Mode](#)

⁴ [Difficulty is about trust and communication, not 'hard' vs. 'easy'](#)

⁵ ['No Man's Sky' Is Like 18 Quintillion Bowls of Oatmeal](#)

⁶ [How \(and Why\) Spelunky Makes its Own Levels | Game Maker's Toolkit](#)

⁷ [How Dead Cells Cheated to Make the Game More Fun | War Stories | Ars Technica](#), 3:47

MECHANIC FIRST LOOK



CASINO > FEATURES > MISSIONS

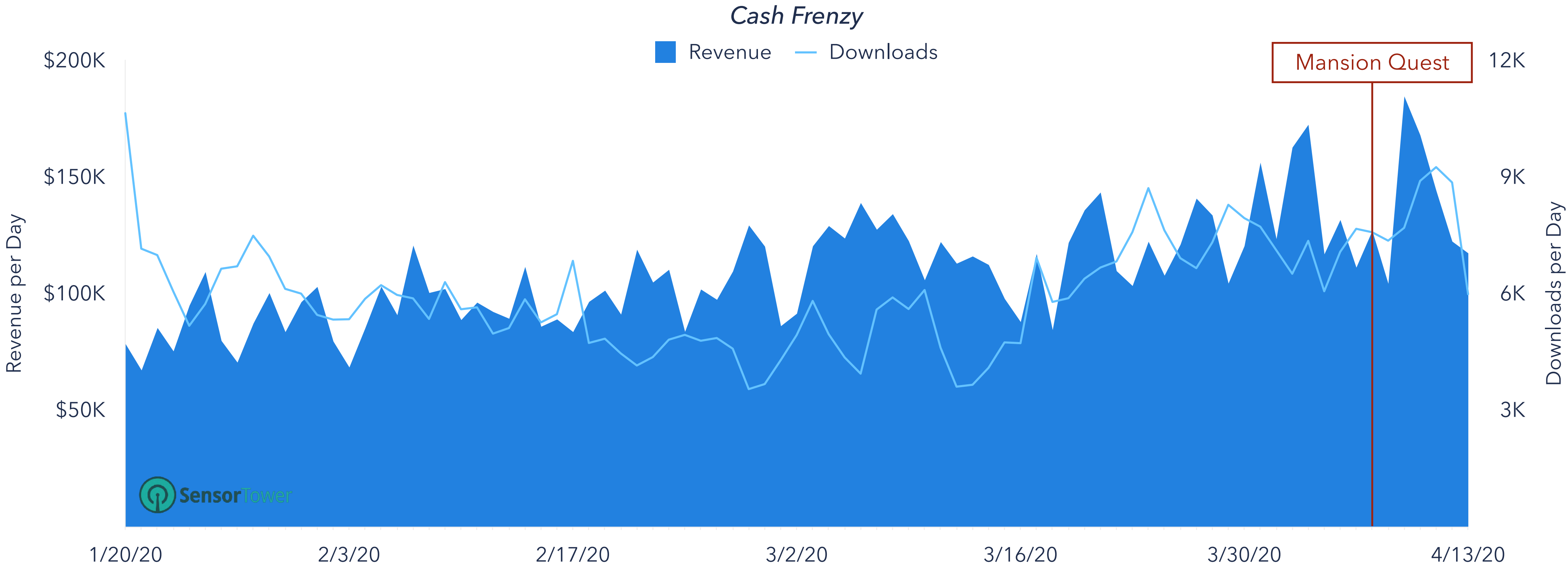
CUSTOMIZABLE PLAY AREA

Mansion Quest in *Cash Frenzy*

REVENUE ANALYSIS

As of now, the impact of Mansion Quest is inconclusive—after its release, *Cash Frenzy*'s revenue was -1% and downloads were +12% WoW. However, similar events are frequent revenue drivers in puzzle apps and are beginning to surface in several casino apps.

Releases
3/20-4/8: Mission Pass Season 6 mission feature
4/3-4/7: Archer Hero mini-game event
4/7: Mansion Quest mission feature
4/8: This Special Offer With Pick Bonus purchase event
No IAP changes during this date range.



Graph data is iOS U.S. only. MoM = Week over week.

FEATURE TEARDOWN

Five challenge progressions award stars that players use to decorate a mansion.

Details

- Players complete challenge progressions to earn stars (1).
- Progressions come in five categories: Bet Coins, Win Coins, Move Steps, Free Games, and Big Wins (2).
- Challenges within each category must be completed in order.
- Stars are used to purchase custom design items, like furniture and decorations, for a mansion (3 and [video](#)).
- Players choose the style of each item (4).

Additional Information

- See the [Mansion Quest](#) Library for more images and videos.



PRODUCT INSIGHTS

Two popular puzzle and RPG mechanics—custom design and buildable areas—are starting to appear in casino apps. The choices and immersion offered by these mechanics appeal primarily to Daydreamer Denise and Sensation Serena players.⁸ This section breaks down four examples of this upcoming trend.

Product Insights

[Mansion Quest](#) – *Cash Frenzy* (released 4/7/20)

- Five challenge progressions award stars that allow players to purchase custom design items for a mansion.
- The feature is very similar to that of [Matchington Mansion](#).
- Revenue was -1% and downloads were +12% WoW after its release.

[Bingo Battles](#) – *Bingo Pop* (released 3/24/20)

- Bingo rounds award monument points, attack tokens, and shield tokens.
- Monument points are used to build and upgrade monuments, attack tokens are used to damage other players' monuments, and shield tokens are used to protect monuments ([1](#) and [video](#)).
- Revenue was -16% and downloads were +13% MoM after its release.

[DeadWood Bounties Beta](#) – *DoubleU Casino* (released 2/14/20)

- Slots spins have a chance to award bounty chests.
- The materials from bounty chests are used to upgrade buildings ([2](#)).
- Revenue was +21% and downloads were +2% MoM after its release.

[Food Town](#) – *Bingo Journey* (released 6/4/19)

- This feature combines *Sims*-like city management and cooking collection ([3](#)).
- Players collect ingredients and complete recipes to upgrade buildings and level up.
- The city management feature is similar to Playrix's [Township](#).
- Revenue was +6% and downloads were +29% MoM after its release.



⁸ [L&G Slots Personas Report](#), p. 17-21, 28-34

QUARTERLY TRENDS



Slots apps:

Big Fish Casino, Caesars Slots, Cash Frenzy, Cashman Casino, DoubleDown Casino, DoubleU Casino, Game of Thrones Slots, Gold Fish Casino, Heart of Vegas, Hit It Rich!, House of Fun, Huuuge Casino, Jackpot Magic Slots, Jackpot Party, Lightning Link Casino, Lotsa Slots, my KONAMI, myVEGAS, POP! Slots, Quick Hit Slots, Scatter Slots, Slotomania, and Wizard of Oz: Casino Slots

Bingo apps:

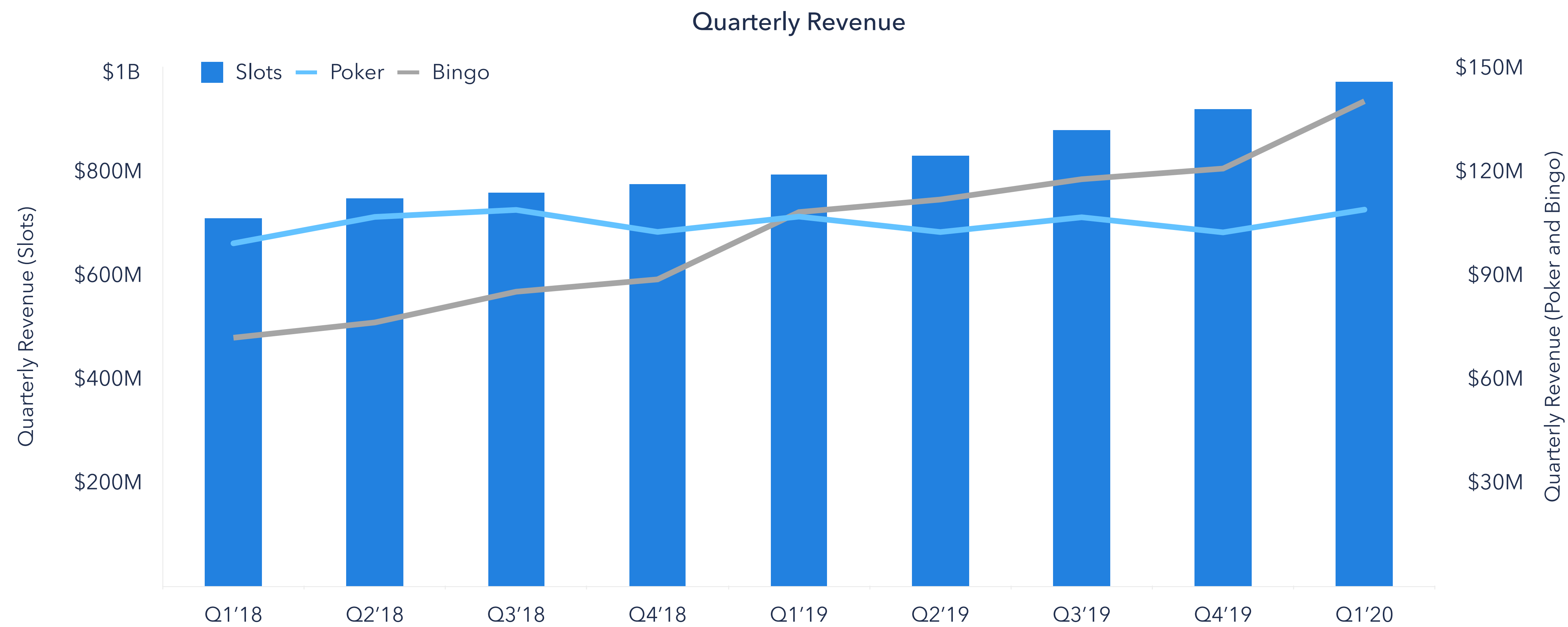
Abradoodle Bingo, Bingo Bash, Bingo Blitz, Bingo Drive, Bingo - Free Bingo Games, Bingo Journey, Bingo Pop, Bingo Showdown, Bingo Story, Blackout Blitz, Club Bingo, and MONOPOLY Bingo

Poker apps:

Governor of Poker 3, Jackpot Poker by PokerStars, Live Hold'em Pro, Mega Hit Poker, Poker Heat: Texas Holdem Poker, PokerStars: Play - Texas Holdem, WSOP, and Zynga Poker - Texas Holdem

REVENUE BY SUBGENRE

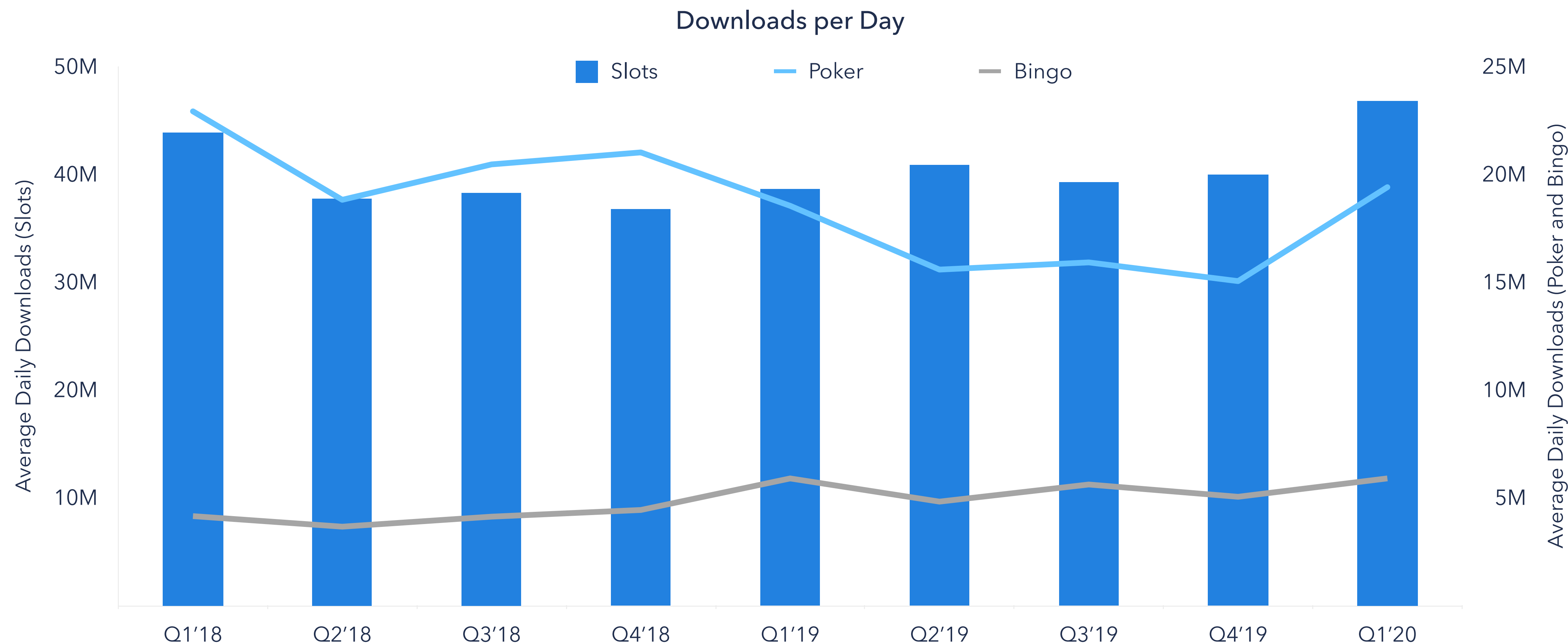
All three casino subgenres saw revenue growth in Q1'20: slots was +6.9%, bingo +17.4%, and poker +7.6% QoQ. This represents slots' and poker's strongest quarterly growth in the last two years.



Graph data is all GEOs, Android and iOS.
QoQ percentage increase is adjusted based on days per quarter.

DOWNLOADS BY SUBGENRE

All three subgenres saw large QoQ increases in download growth for Q1'20: +28.7% in slots, +30.3% in poker, and +18.1% in bingo.



Graph data is all GEOs, Android and iOS.
QoQ percentage increase is adjusted based on days per quarter.

REVENUE GROWTH BY APP

Among 25 tracked casino apps, 13 saw greater QoQ revenue growth in Q1'20 than in Q1'19. Median QoQ revenue growth was +3.4% in Q1'20 compared to +1.2% in Q1'19.

App Name	Q1'19	Q2'19	Q3'19	Q4'19	Q1'20
Cash Frenzy	355.9%	136.3%	38.2%	17.1%	40.1%
Scatter Slots	7.9%	14.0%	-4.6%	-0.5%	28.4%
Caesars Slots	1.4%	-4.4%	-4.3%	-5.7%	17.8%
myVEGAS	16.4%	-9.7%	-3.0%	-1.6%	15.3%
Lotsa Slots	117.3%	71.0%	22.8%	5.0%	12.6%
DoubleDown Casino	-0.7%	-0.5%	5.7%	10.5%	12.0%
Lightning Link Casino	42.8%	43.5%	35.4%	-2.3%	9.6%
Quick Hit Slots	-0.1%	-7.7%	-9.2%	9.7%	8.7%
Slotomania	-0.1%	4.0%	7.4%	3.0%	7.8%
Wizard of Oz	-1.9%	-0.3%	-1.3%	11.7%	5.2%
Jackpot Magic Slots	8.3%	-10.5%	5.1%	-2.2%	5.1%

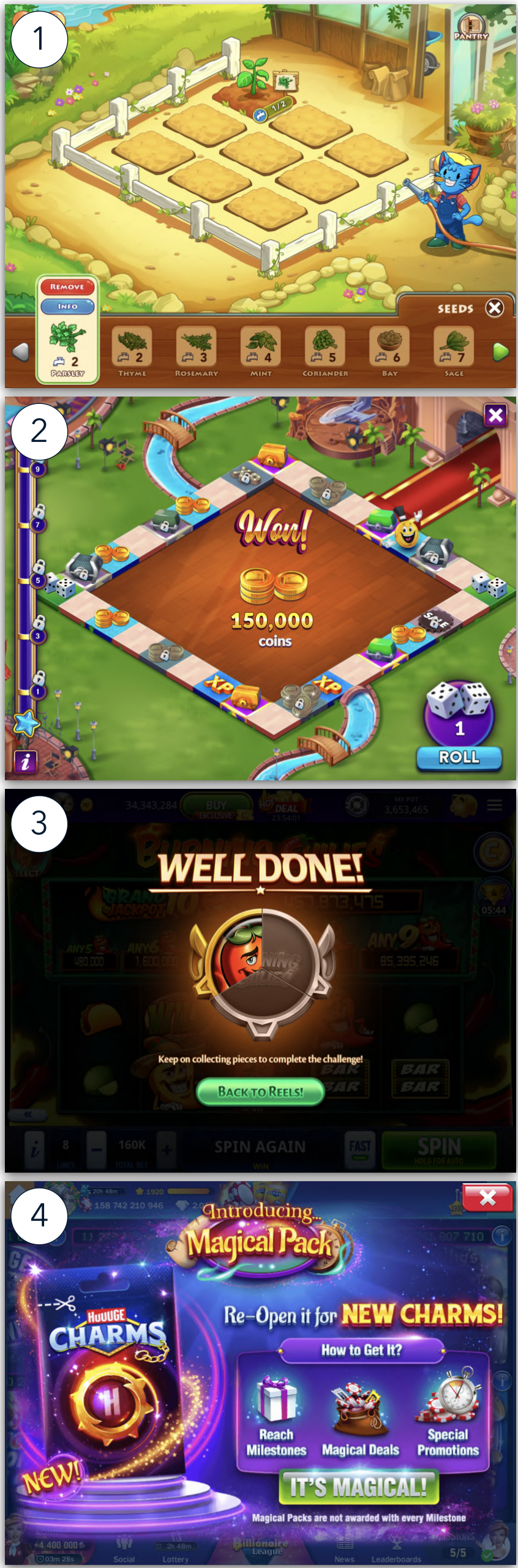
App Name	Q1'19	Q2'19	Q3'19	Q4'19	Q1'20
Huuuge Casino	0.1%	-5.0%	5.3%	9.1%	3.4%
Cashman Casino	-6.5%	-1.9%	15.7%	7.8%	3.0%
POP! Slots	0.2%	-6.0%	3.6%	-0.3%	2.9%
DoubleU Casino	1.0%	0.7%	-1.5%	-0.7%	1.4%
Game of Thrones Slots	--	--	266.3%	11.4%	-0.8%
Gold Fish Casino	-1.4%	-10.5%	2.1%	9.9%	-1.2%
Heart of Vegas	-15.3%	10.4%	-15.3%	3.0%	-1.4%
Jackpot Party	8.4%	1.5%	16.4%	15.1%	-2.8%
House of Fun	-7.2%	5.4%	-10.3%	-5.2%	-2.8%
my KONAMI	8.3%	3.0%	10.4%	11.9%	-4.7%
Hit It Rich!	13.2%	7.0%	0.0%	-1.6%	-6.4%
Big Fish Casino	4.6%	-5.4%	0.1%	0.8%	-7.0%

MARKET WATCH



NOTABLE RELEASES I

App	Library	Description
Bingo Blitz	Organic Hideaway collection event	<ul style="list-style-type: none">• Players claim gifts, earn bonuses, or grow plants in a garden to collect ingredients.• Ingredients are used to complete dishes for bingo chips and chef points.<ul style="list-style-type: none">• Unlockable sets of recipes and ingredients are made up of three categories.• Completing all three categories awards a prize and unlocks the next set.• Some ingredients can be grown by planting seeds in unlockable soil beds.<ul style="list-style-type: none">• Seeds must be watered a certain number of times to grow into ingredients (1).
Cashman Casino	Cashman Studios Blockbusters collection feature	<ul style="list-style-type: none">• Players collect chests containing props and Cashman awards from spins, level-ups, or purchases.<ul style="list-style-type: none">• Duplicate props fill a meter for additional chests at milestones.• Completing all collection sets awards the grand prize.• Daily dice rolls advance players on a game board with more chests (2 and video).<ul style="list-style-type: none">• Cashman awards fill a meter to unlock more tiles and upgraded game boards.• Duplicate Cashman awards fill a meter for extra dice rolls.
DoubleU Casino	Challenge Badges collection feature	<ul style="list-style-type: none">• Week-long mission events consist of three sets of three challenges.• Finishing all three challenges from a set awards a piece of an event-exclusive badge (3).• Finishing all three sets awards the completed badge.
Huuuge Casino	Huuuge Charms Magical Ages collection feature	<ul style="list-style-type: none">• Players earn charms from spins, purchases, level-ups, milestones, and special events.• Magical Packs are awarded every 10 levels and through special purchase offers and events.<ul style="list-style-type: none">• Magical Packs can be reopened once to replace the charms they contain (4).• Completed sets award chips and, for some sets, avatar frames.

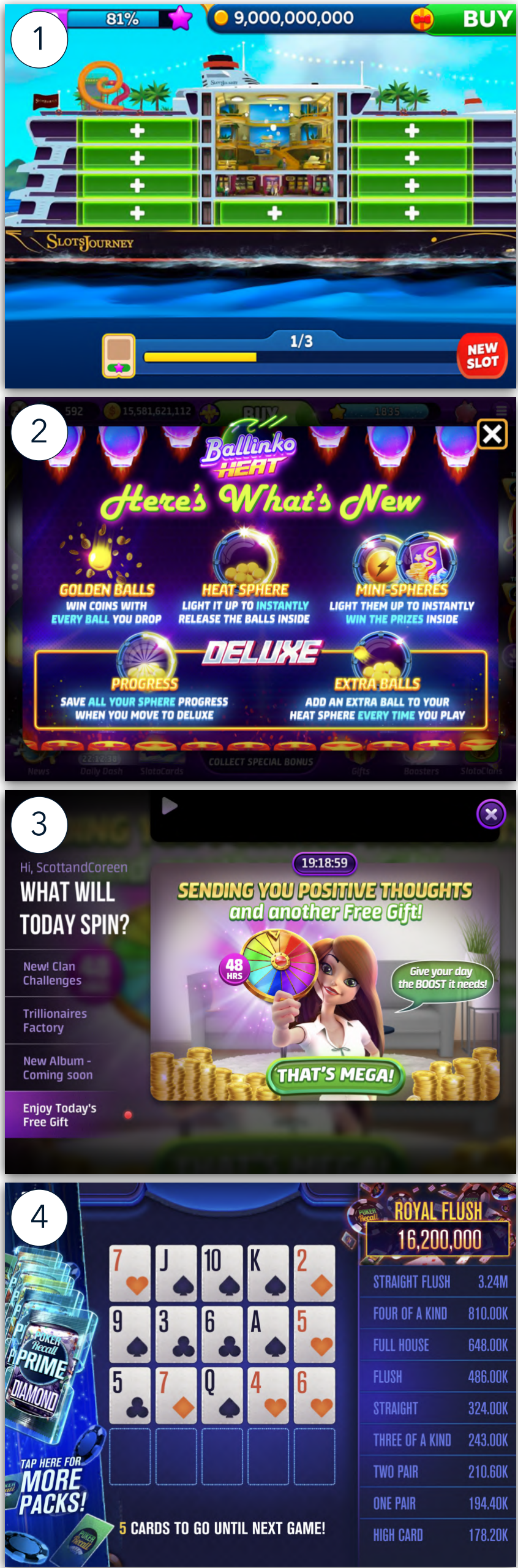


NOTABLE RELEASES II

App	Library	Description
In Soft Launch		
<i>Slots Journey Cruise & Casino</i> by Murka	<i>Slots Journey Cruise & Casino</i> casino app	<ul style="list-style-type: none">This slots-builder app soft-launched on 3/26/20 in Canada and Ukraine.Players upgrade a cruise ship to fill a meter and unlock new slots (1).
Slotomania	<i>Ballinko Heat Deluxe</i> mini-game feature	<ul style="list-style-type: none">This update to <i>Ballinko</i>, a pachinko-style mini-game, adds a number of new mechanics.<ul style="list-style-type: none">Balls award coins on every drop.Two kinds of spheres award prizes or release extra balls after a certain number of hits (2).A premium mode saves sphere progress between rounds and adds more balls to spheres.
	<i>News Feed</i> notice feature	<ul style="list-style-type: none">A News Feed menu updates players with daily promotions, club challenges, machine updates, collections, gifts, and more.Unviewed tabs are marked with a red dot that disappears upon viewing (3).
WSOP	<i>Poker Recall Prime</i> mini-game event	<ul style="list-style-type: none">Players collect packs of cards by making bets or purchases.Chips are awarded for all poker hands made by collected cards (4).Collecting 20 cards completes the board, pays out all chips, and begins the next game.Prime Cards add multipliers to the board.

Quickly review all features and machines

Filter the [Library Tool](#) by month and year to see all new releases.



APPENDIX



LIQUID & GRIT SLOTS PERSONAS

Participants from the U.K. and U.S. (N=1,299) were surveyed about their mobile gaming use. The data produced five personas with distinct patterns of slots preferences and playing habits.

	Demographics				
	Fame Frank	Money Mike	Daydreamer Denise	Gambler Gail	Sensation Serena
Size	21%	22%	27%	19%	11%
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 represent the relative value of each category compared to other player personas.

PREMIUM PARTNERSHIPS

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

Sensor Tower	Kinrate Analytics	Quadrant Strategies
<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.	<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 with economists, psychologists, game scholars, and data scientists.</p>	<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>



CASINO MECHANICS TAXONOMY

Family	Definition
Accelerators	Increases the power, impact, or efficiency of play
Banks	Saves a % of spend that can be unlocked later
Bonuses	Free bonuses given to players, often with time intervals
Challenges	Goal-oriented tasks for players to complete
Clubs	A group of players accomplishing goals or competing with other groups
Collections	A set of items players collect, often for a completion prize
Competitions	Players competing against other players
Cosmetics	Improvements or updates to the game or a feature
Currencies	Changes to currencies, economies, stores, and items
Expansions	Additional rooms, worlds, play modes, VIP lounges, etc.
Flows	Specific flows, like the new user flow, ratings, and surveys

Family	Definition
Interactions	Any social feature with direct or indirect interaction
Leaderboards	Stand-alone leaderboards
Levels	Anything to do with leveling
Mini-Games	Smaller, shorter games within the app (e.g., scratch cards)
Missions	A linear set of tasks that players must accomplish
Notices	Feature or product announcements
Other	Miscellaneous features and outliers
Profiles	A player's setup, profile, settings, and controls
Purchases	Anything to do with spending money on items in the app
Quests	Completing tasks to progress along a map or map-like mechanic
Rewards	Any reward players receive for engagement or spend (other than those in the bonuses family)

“Intelligence is the ability to adapt to change.”

– Stephen Hawking

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