



LIQUID&GRIT

CASINO REPORT

Competitive Research and Actionable Product Recommendations

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MAY

2020

REVENUE DRIVER



CASINO > FEATURES > MISSIONS

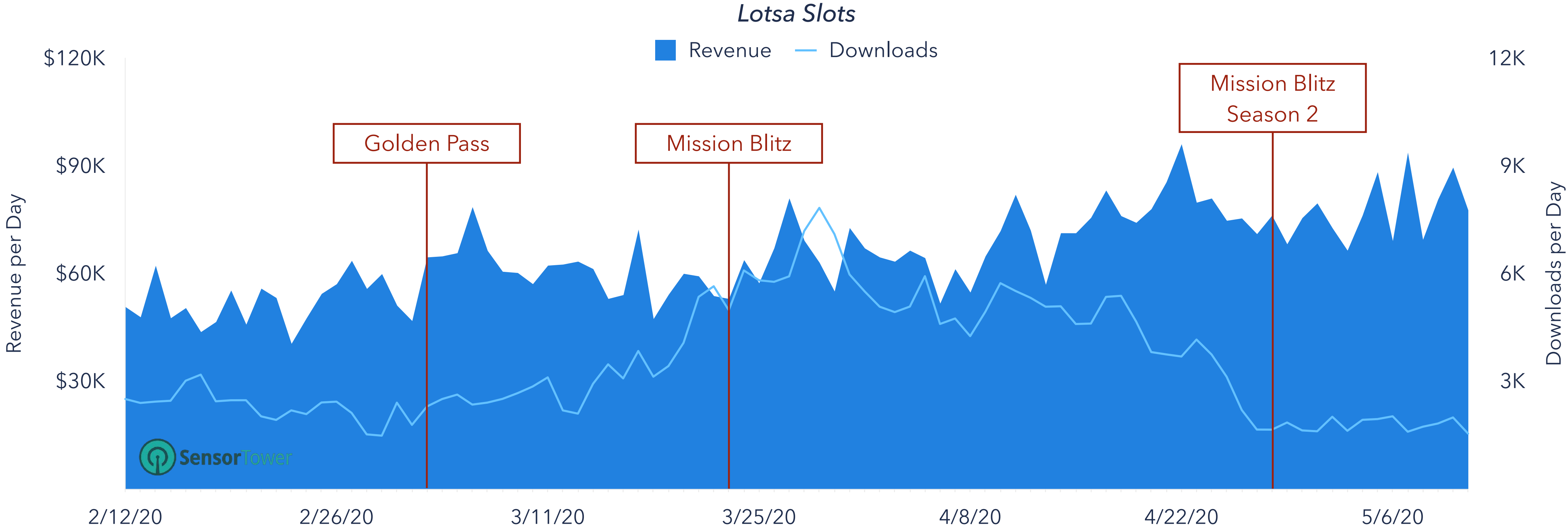
DAILY CHALLENGE PROGRESSION AND STORE

Mission Blitz & Mission Blitz Season 2 in *Lotsa Slots*

REVENUE ANALYSIS

Revenue was +18% and downloads were +4% 50Do50D after the initial release of Mission Blitz. This period also includes the release of Mission Blitz Season 2.

Releases	
3/3: Golden Pass mission feature (new)	3/23: Level Up Party leveling event
3/4: \$99.99 All-In Pack IAP moved +1 to #9	3/23: Lion Loot content release
3/9: \$99.99 All-In Pack IAP moved +1 to #8	3/23: Mission Blitz mission feature
• \$49.99 High Roller Pack IAP to #10 (NPL)	• 4/28: Mission Blitz Season 2 mission feature
3/11: \$6.99 Classic Boost Pack IAP moved +1 to #10	3/23-3/31: Diner Hero collection event
3/16: \$49.99 High Roller Pack IAP moved +1 to #10	3/24-3/27: Scratch & Win mini-game event (FB)
3/19-3/31: Quest King World Series XXI: Spring quest event	3/25: Golden Oinky Day bank event (FB)
	*NPL = Not previously listed



50Do50D = 50 days compared to the previous 50 days.
Graph data is iOS U.S. only.

FEATURE TEARDOWN

Daily challenges award lightning bolts that increase a feature-specific XP level and can be used to purchase coin prizes and pick'em bonuses. Higher XP levels unlock a leaderboard and add starting lightning bolts to subsequent seasons.

Details

- Machine-specific daily challenges award lightning bolts and stars (1).
 - A button under each challenge sends players to the relevant machine.
 - Each completed challenge unlocks a more difficult challenge on the same machine (2).
 - Challenges reset and refresh every 24 hours.
- Stars fill the [Golden Pass](#) level meter.
- Lightning bolts can be exchanged for coin prizes and jackpot pick'em bonuses in an event store (3 and 4).
 - Exchanging lightning bolts also awards XP to increase players' Mission Blitz levels.
 - Levels unlock additional purchase tiers (5).
 - Players who reach levels 4-6 start the next season with 5,000-50,000 lightning bolts (6).
 - Reaching level 6 unlocks leaderboards and a larger jackpot pick'em (7).

Additional Information

- See the [Mission Blitz](#) and [Mission Blitz Season 2](#) Libraries for more images and videos.



PRODUCT INSIGHTS

Increase engagement by designing mission UIs that let players navigate directly to the relevant machines for each task. Then, break tasks into different categories to improve motivation, effort, and enjoyment.

Insight Details

- **Use hierarchical task analysis to design effective user interfaces that account for every step players must take.** In the UI for [Mission Blitz](#), players can view new challenges, *navigate directly to the relevant machine*, claim prizes, and spend event currency—all within a single interface. This reflects a keystone of effective UX design called “hierarchical task analysis,” whereby designers detail each action a user takes to achieve a goal and then design features to make those actions as easy as possible.¹

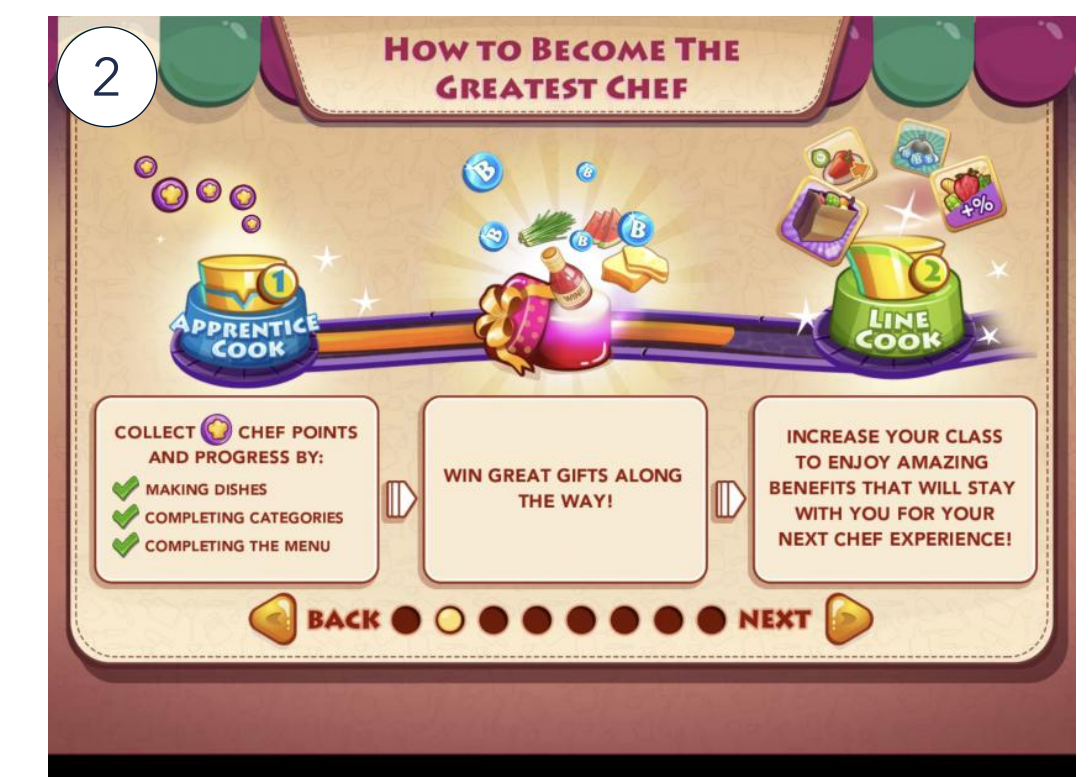
Effective UIs are driving revenue in other genres, too; *Star Wars: Galaxy of Heroes*' streamlined [Journey Guide](#) UI update contributed to a revenue increase of 70% MoM. This UI included all available quests and challenges, plus guides for unlocking the rarest heroes and equipment (1).

- **Divide tasks into short- and long-term categories to increase motivation, effort, and enjoyment.** *Lotsa Slots* offers three types of missions: machine-specific daily Mission Blitz challenges, three app-wide daily missions, and season-wide Golden Pass missions. Research has shown that combining short- and long-term goals yields higher performance than using just one or the other.²

However, the effect of categorizing tasks goes even further. One study found that subjects who were assigned a task broken down into *arbitrary categories* were over 3.5x more likely to complete it than a control group given the same task without categories. Moreover, members of the categorized group ranked their motivation 38% higher and rated the task as 35% more enjoyable.³

- **Carry over progression between seasons.** Mission Blitz rewards players who reach level 4 or higher with a certain amount of event currency at the start of the next season. Similarly, after *Bingo Blitz*'s [Euro Bites](#) collection event—which drove a 23% WoW revenue increase—players' ranks carried over into subsequent events for increased bonus rewards and other perks (2).

Progression-based features like challenges, collections, and quests appeal to Daydreamer Denise player types. Persistent progressions increase the meaning attached to these features and provide extra immersion to satisfy Daydreamer Denise's need for escapism.⁴ We suspect that cross-season progress will be a growing trend as apps release more progression-based features and events.



¹ [Hierarchical Task Analysis](#)

² [Effect of Goal Proximity and Goal Specificity on Muscular Endurance Performance: A Replication and Extension](#)

³ ["I'll Have One of Each": How Separating Rewards Into \(Meaningless\) Categories Increases Motivation](#) p. 4

⁴ [Liquid & Grit Slots Personas Report](#), p. 17-21

PRODUCT 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

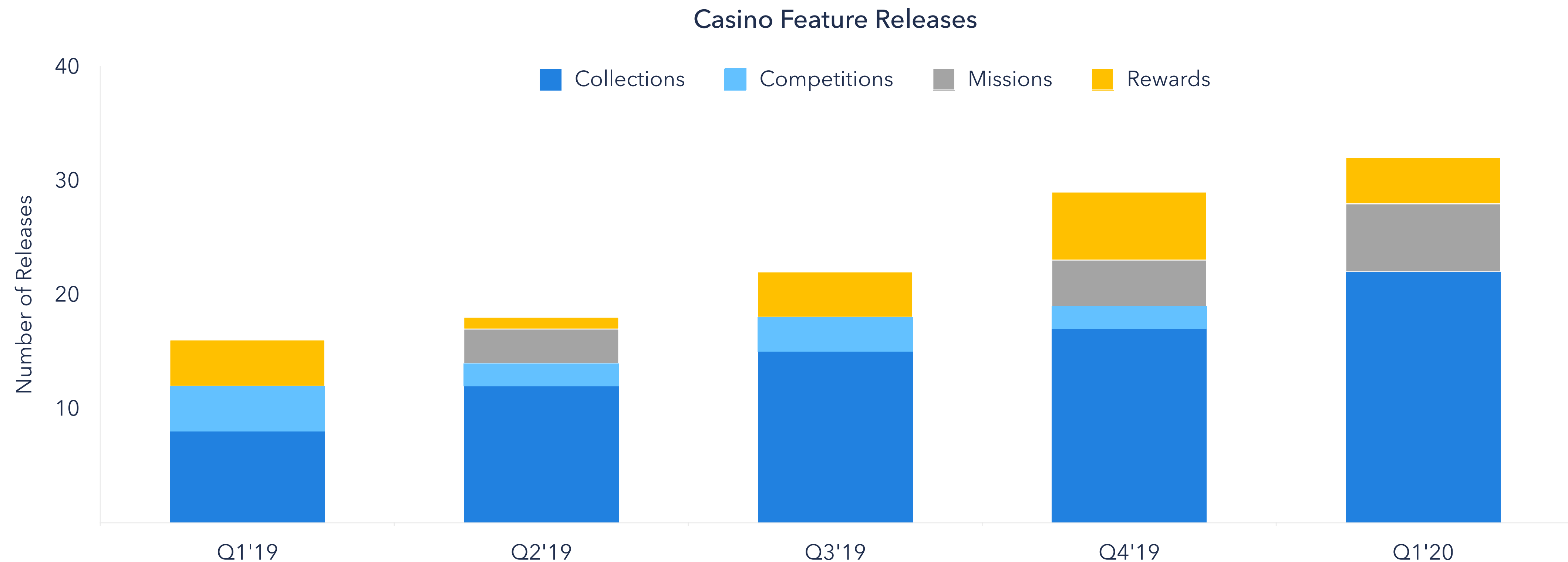
Poker apps:

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

COLLECTION FEATURES

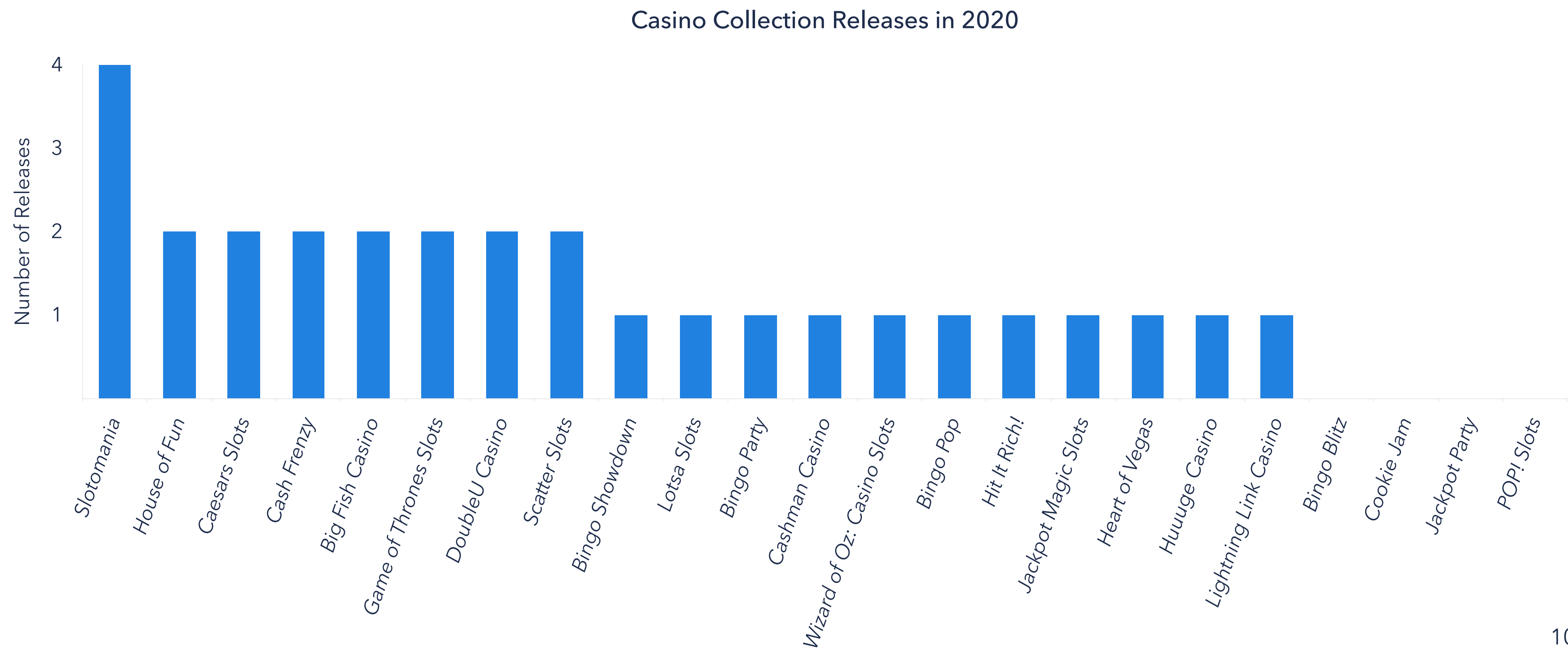
Casino apps have been investing more heavily in collection features in 2020, averaging 7 releases per month compared to 4.3 per month in 2019.

Mission and reward features have also increased this year, while no competition features have been released so far.



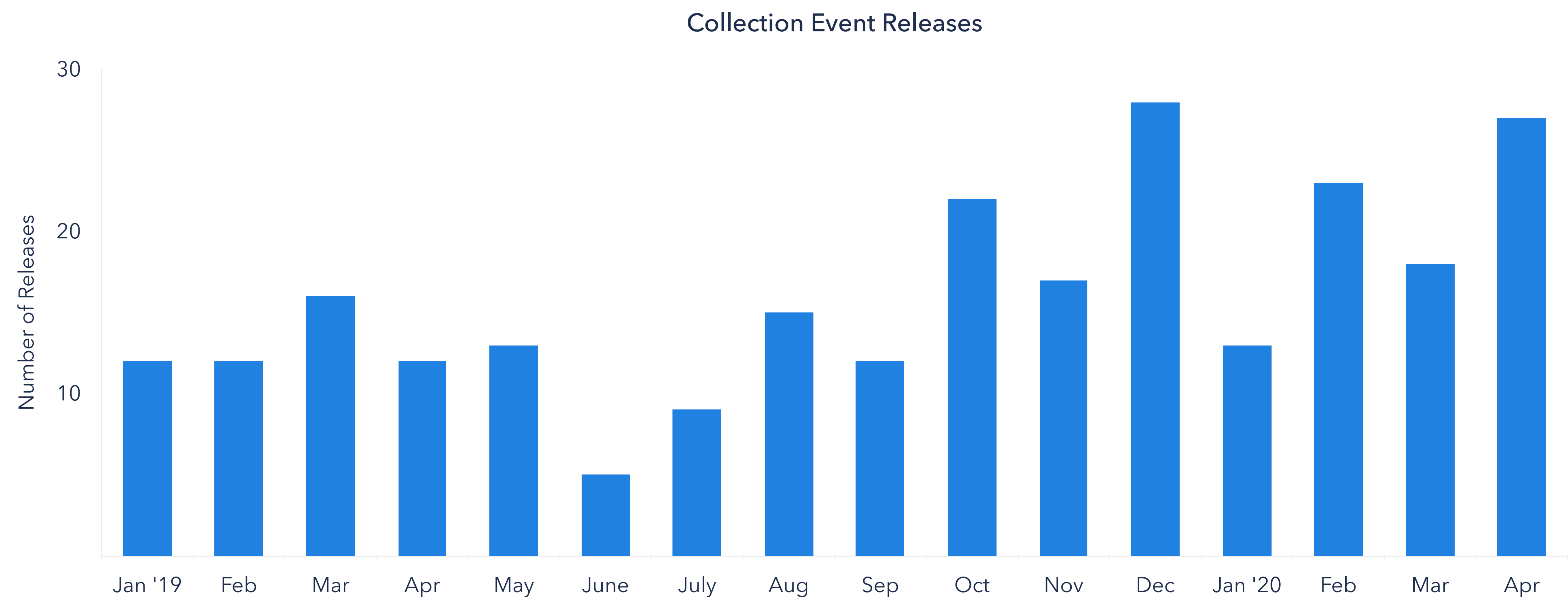
COLLECTION FEATURES (CONT'D.)

Bingo Showdown, DoubleU Casino, Lightning Link Casino, and Scatter Slots have invested more heavily in collection features so far in 2020 compared to 2019. Slotomania has released the most collection features this year.



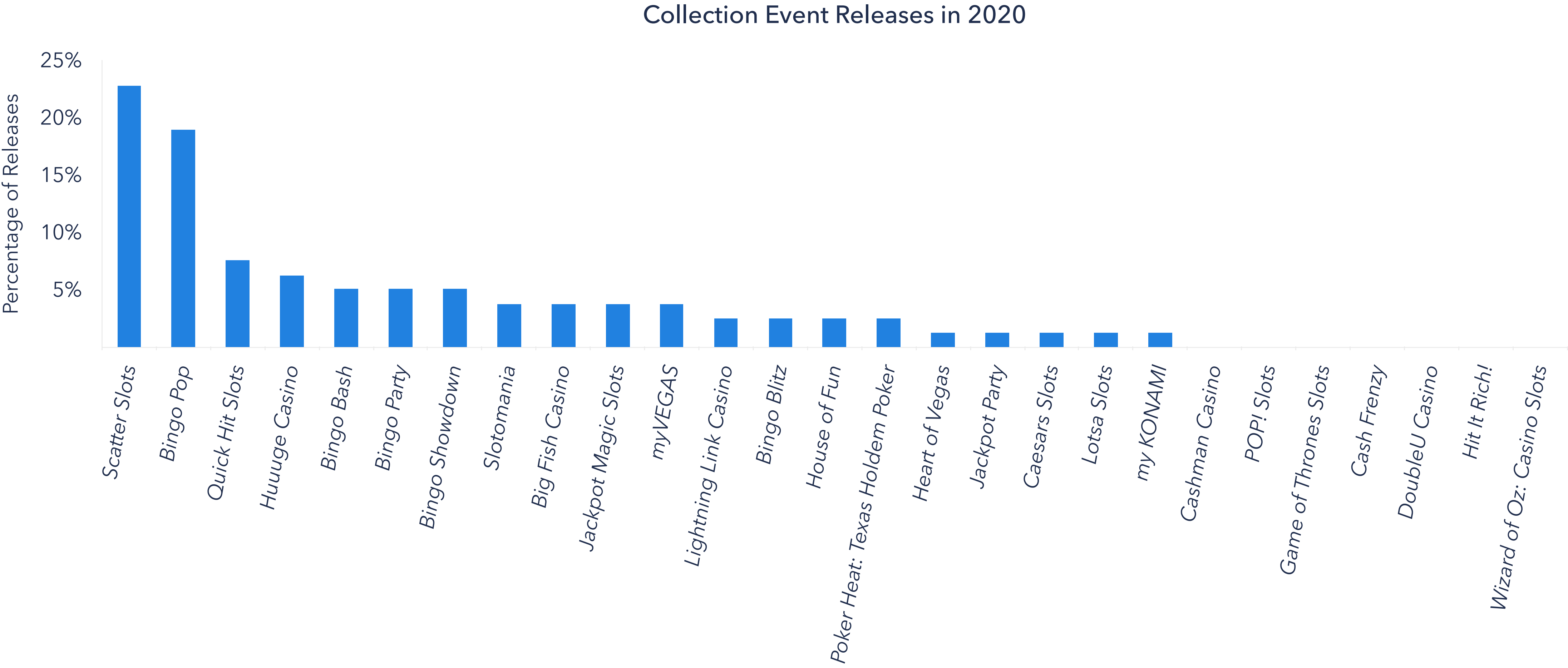
COLLECTION EVENTS BY MONTH

Since October 2019, tracked casino apps have averaged over 20 collection event releases per month—nearly double the average monthly releases from January through September 2019.



COLLECTION EVENTS BY APP

Scatter Slots and Bingo Pop account for over 40% of all collection events released in tracked casino apps from January through April 2020.

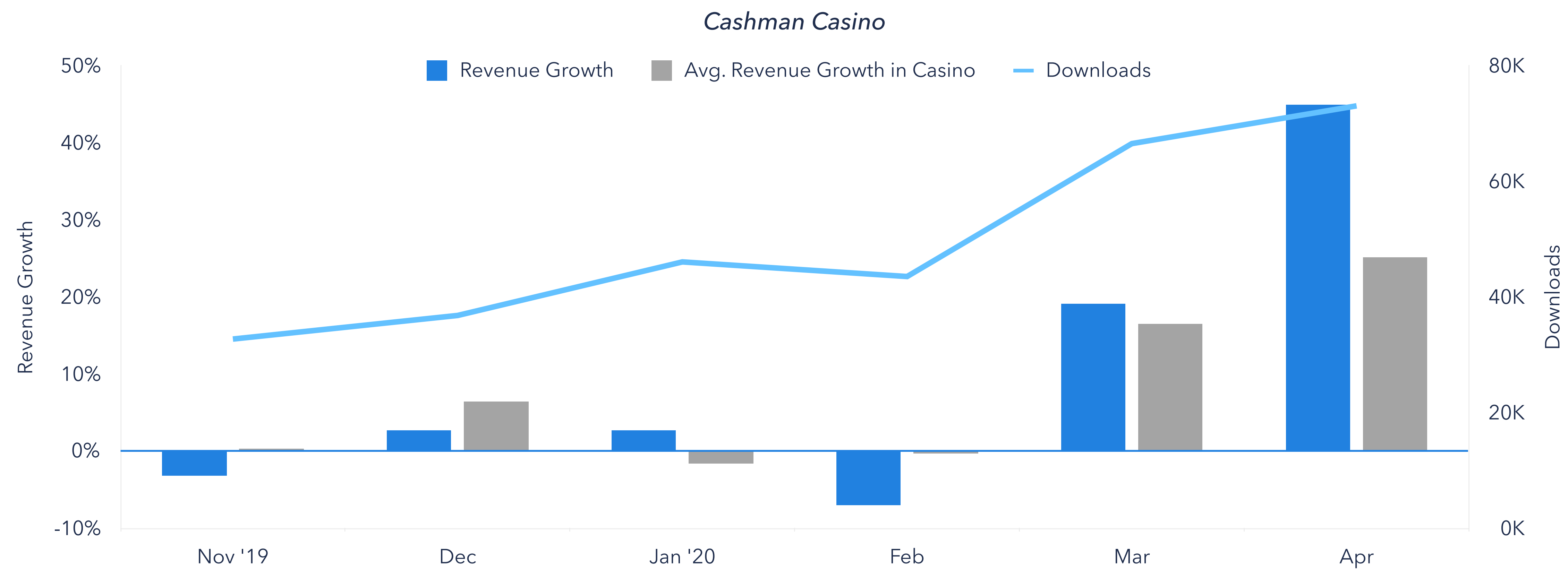


REVENUE MOVEMENT



CASHMAN CASINO

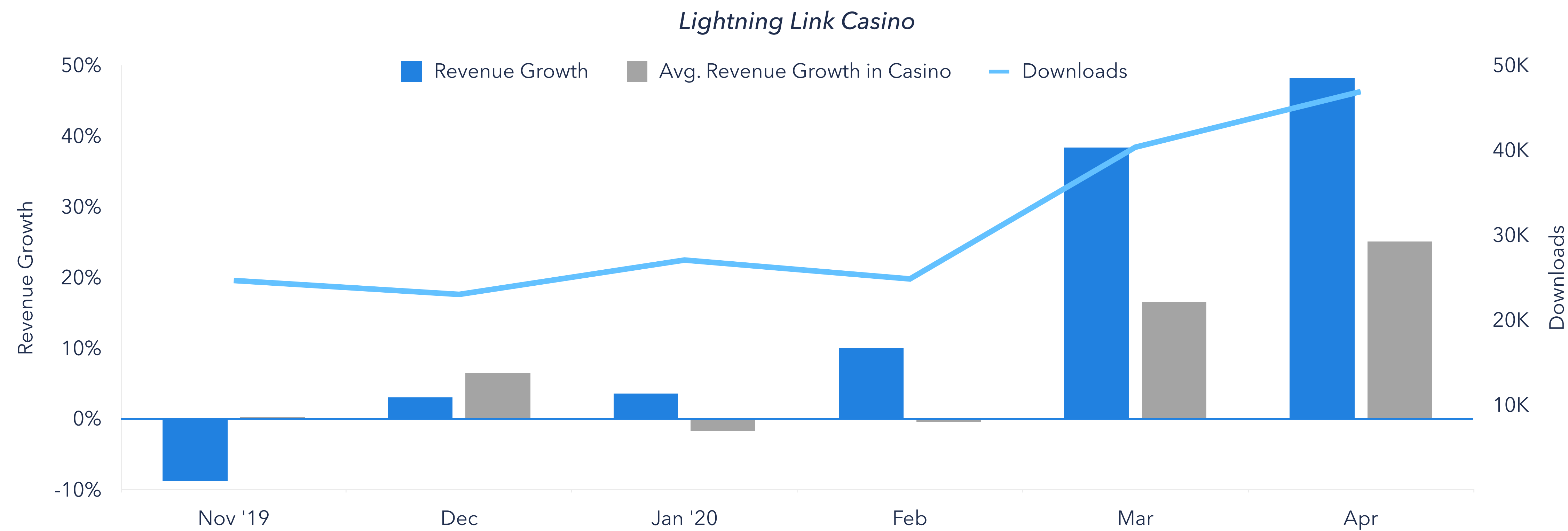
Cashman Casino's April revenue growth was nearly double the average growth rate among tracked casino apps in that period. [Cashman Studios Blockbuster](#) (released 4/2/20) lets players spin to collect chests of props and Cashman Awards to upgrade a board game mini-game.



Graph data is all GEOs, Android and iOS.

LIGHTNING LINK CASINO

Lightning Link Casino has outperformed the average MoM revenue growth for tracked casino apps since January 2020—more than doubling the average for the first three months of the year. In April, the app saw a 48% revenue increase, still nearly double the average of 25%. Starscapes, a retention feature released on 3/22, lets players claim timed bonuses to collect planets and complete constellations.



Graph data is all GEOs, Android and iOS.

MARKET WATCH



BREAKOUT APPS I

Show Me Vegas Slots by KSG Mobile

- Completing a certain number of spins per day awards a daily mystery prize (1).
- Earning consecutive daily mystery prizes adds an increasing streak multiplier.
- Tournament rooms display the maximum number of players and the number of winners (2).

Launch Information

- Released worldwide on 10/11/19
- 64th highest-grossing casino app as of 5/1
- Average daily revenue (last 90 days): \$6,437
- Average daily downloads (last 90 days): 1,280

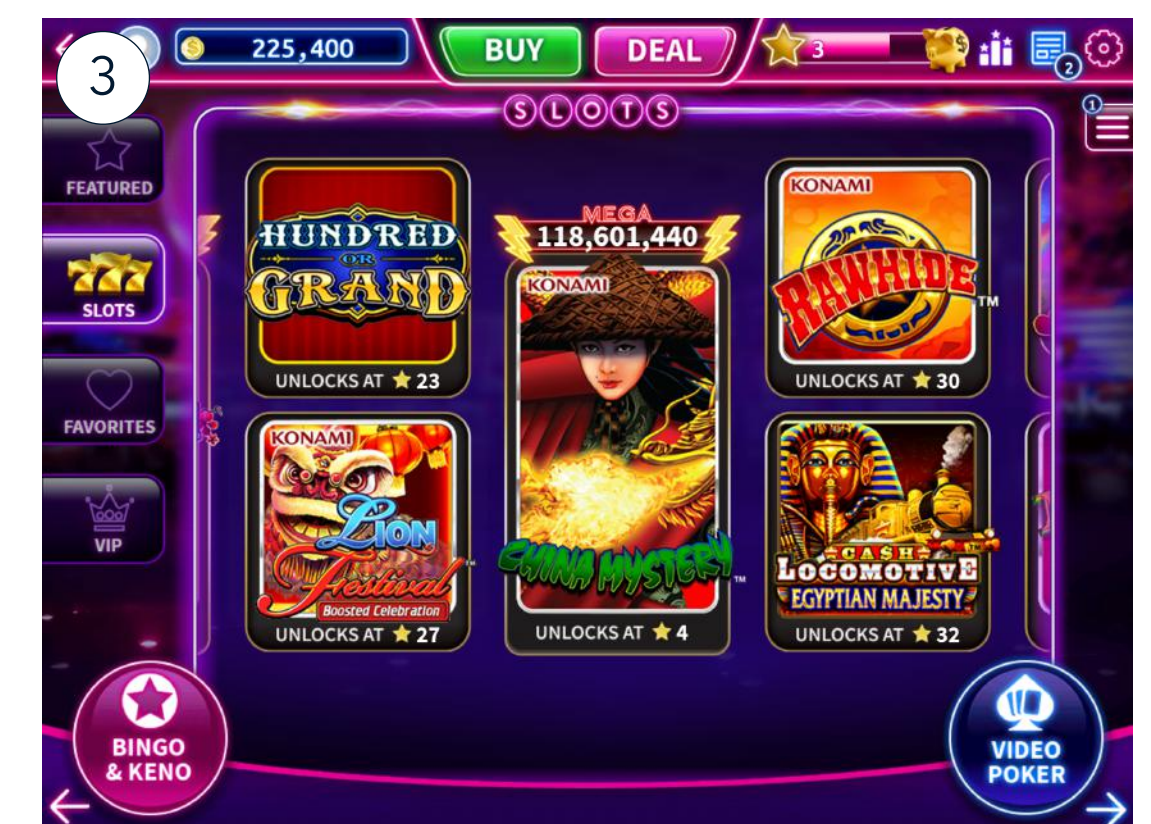
Mystic Slots by Ruby Seven Studios

- Gameplay includes casino slots, bingo, keno, video poker, and blackjack on licensed RMG machines "from Konami™, Everi™, Aruze™ and more" (3).
- Daily quests fill a weekly meter for a bonus wheel spin.

Launch Information

- 72nd highest-grossing casino app as of 5/1
- Released worldwide on 12/23/19
- Average daily revenue (last 90 days): \$2,441
- Average daily downloads (last 90 days): 368

Licensed content represents 20% of *Mystic Slots*' machines.



BREAKOUT APPS II

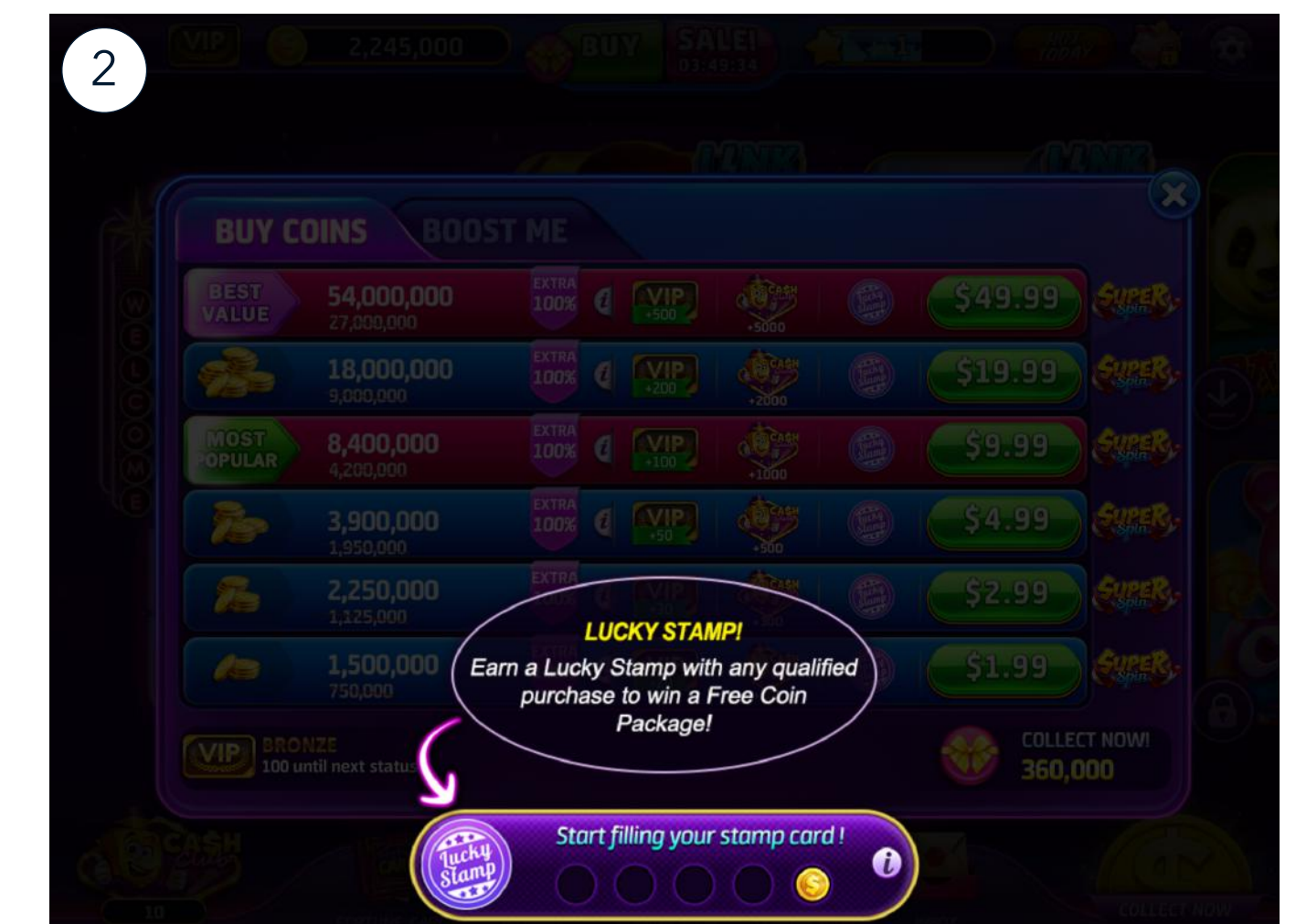
Cash Tornado Slots by Madness Limited

- Players earn club points for completing challenges, making purchases, and claiming bonuses.
 - Club points fill a meter for a 7-day pass that unlocks exclusive machines and enhances XP, bonuses, and the coin store—similar to *Slotomania*'s [SlotoClub](#) (1).
- Purchases award stamps on a stamp card for a free coin prize when filled—similar to *Slotomania*'s [Stamp It](#) (2).

Launch Information

- Released worldwide on 3/5/20
- 69th highest-grossing casino app as of 5/1
- Average daily revenue (since release): \$5,960
- Average daily downloads (since release): 6,062

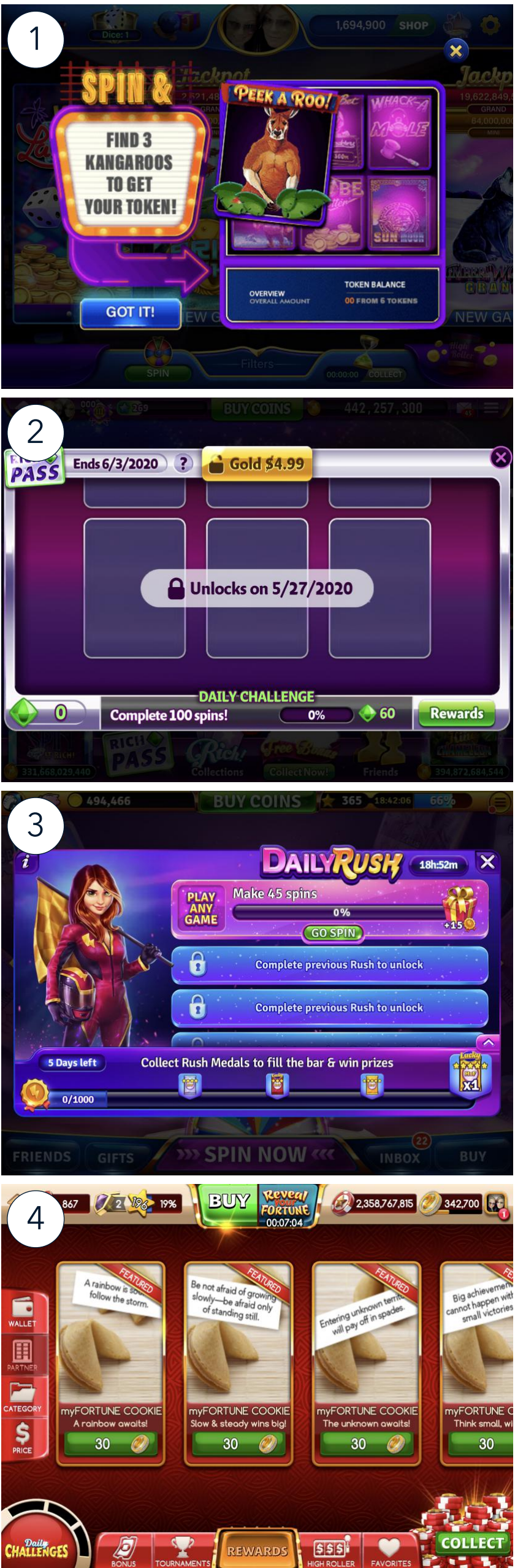
Give players “free” initial progress on loyalty card features to increase motivation and spending. One study found that providing two apparently free stamps on loyalty programs nearly doubled completion rates, even when the actual number of required purchases stayed the same.⁵



⁵ [The Endowed Progress Effect: How Artificial Advancement Increases Effort](#), p. 506

NOTABLE RELEASES I

App	Library	Description
Heart of Vegas	Daily Events mission event	<ul style="list-style-type: none">Daily challenges award tokens (1).Tokens can be exchanged for rewards.
Hit It Rich!	Rich Pass challenge event	<ul style="list-style-type: none">Daily and ongoing challenges award gems.Three new challenges unlock every three days (2).Gems fill a meter with rewards at milestones.A \$4.99 gold pass unlocks a second tier of rewards (video).
House of Fun	Daily Rush Update mission feature	<ul style="list-style-type: none">Players earn prizes and collect medals by completing daily challenges.Challenges must be completed in order (3).Medals fill a meter with rewards at milestones.
my KONAMI	Karma Awards reward feature	<ul style="list-style-type: none">Players collect VIP currency during play.VIP currency can be used to purchase lucky charms, fortune cookies, and lucky numbers (4 and video).A charm, cookie, or number is randomly drawn in a weekly raffle on Facebook.All players who own the drawn item win a chip prize.
myVEGAS	Exclusive VIP Event competition event	<ul style="list-style-type: none">Bonuses and chip bundle purchases increase players' VIP levels.Players with VIP levels 7+ earn double their largest free spin wins in the Powers of the Nile machine.



NOTABLE RELEASES II

App	Library	Description
myVEGAS	Selling Fast purchase event	<ul style="list-style-type: none">An IAP offer displays how many other players recently purchased it (1).
Poker Heat: Texas Holdem Poker	Easter Egg-Hunt collection event	<ul style="list-style-type: none">Players collect Easter eggs by completing challenges or inviting friends (2).Collecting a certain number of eggs completes a hunt for rewards.
POP! Slots	Punch Lines mission event	<ul style="list-style-type: none">A board specifies a fish symbol and marks reel positions with Xs.Landing the specified fish symbol on marked positions converts Xs into check marks (3 and video).Converting all Xs to check marks completes the board.Completing all boards for a fish unlocks the next fish.
Quick Hit Slots	Quick Hit Double or Nothing collection event	<ul style="list-style-type: none">Players collect red cups during spins.Collecting a certain number of red cups awards a pick'em mini-game with two cups.<ul style="list-style-type: none">One cup doubles the reward and the other awards nothing (4).
Slotomania	Casino Heist collection event	<ul style="list-style-type: none">Players collect keys by completing Daily Dash challenges or leveling up within a time limit via Level Rush.Collecting 24 keys awards a wild SlotoCard.

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)

“Somewhere, something incredible is waiting to be known.”

– Carl Sagan

LiquidandGrit.com



Brett.Nowak@LiquidandGrit.com

