



LIQUID&GRIT

CASINO REPORT

Competitive Research and Actionable Product Recommendations

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JULY

2020

REVENUE DRIVER



Revenue-boosting features and events with product data and recommendations

CASINO > FEATURES > EXPANSIONS

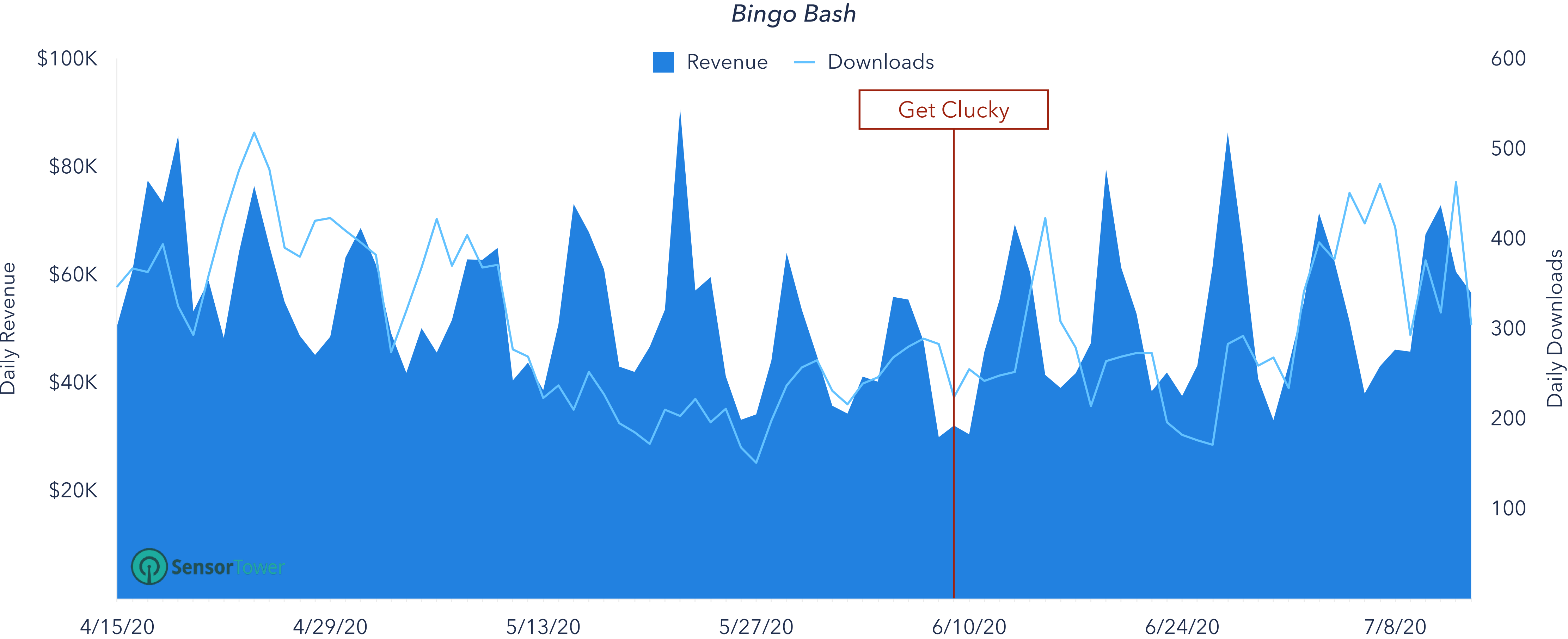
BINGO ROOM WITH COLLECTION PUZZLE MINI-GAME

Get Clucky in *Bingo Bash*

REVENUE ANALYSIS

After the launch of *Get Clucky*, *Bingo Bash*'s revenue was +13% and downloads were +16% 2Wo2W.

See the [Appendix](#) for a full release schedule and details on IAP changes.



2Wo2W = 2 weeks over 2 weeks

Graph data is iOS U.S. only.

FEATURE TEARDOWN

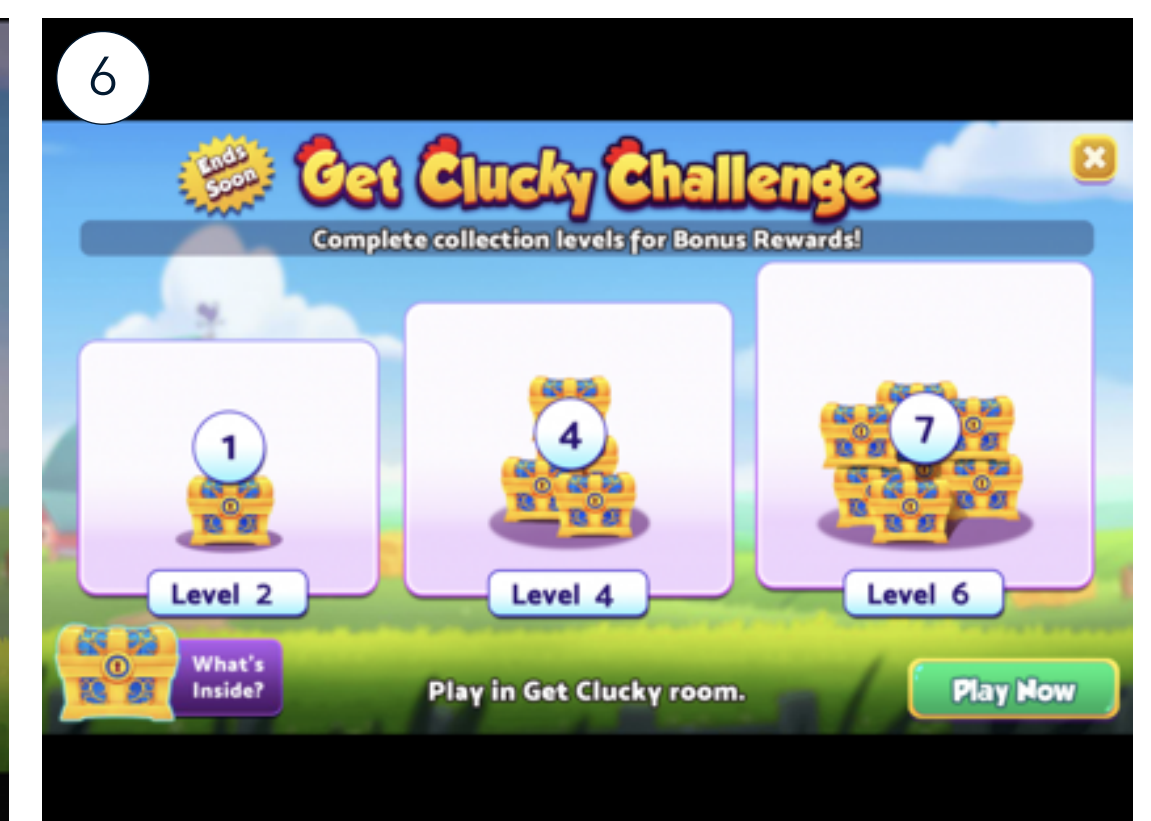
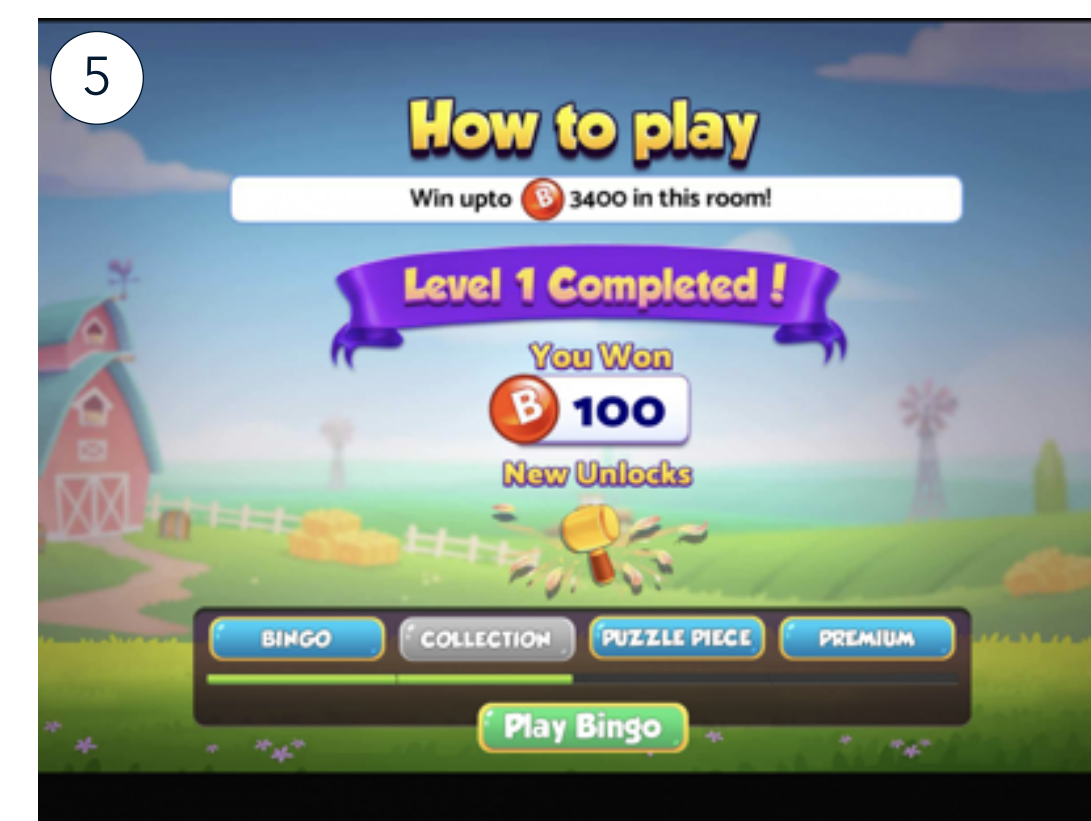
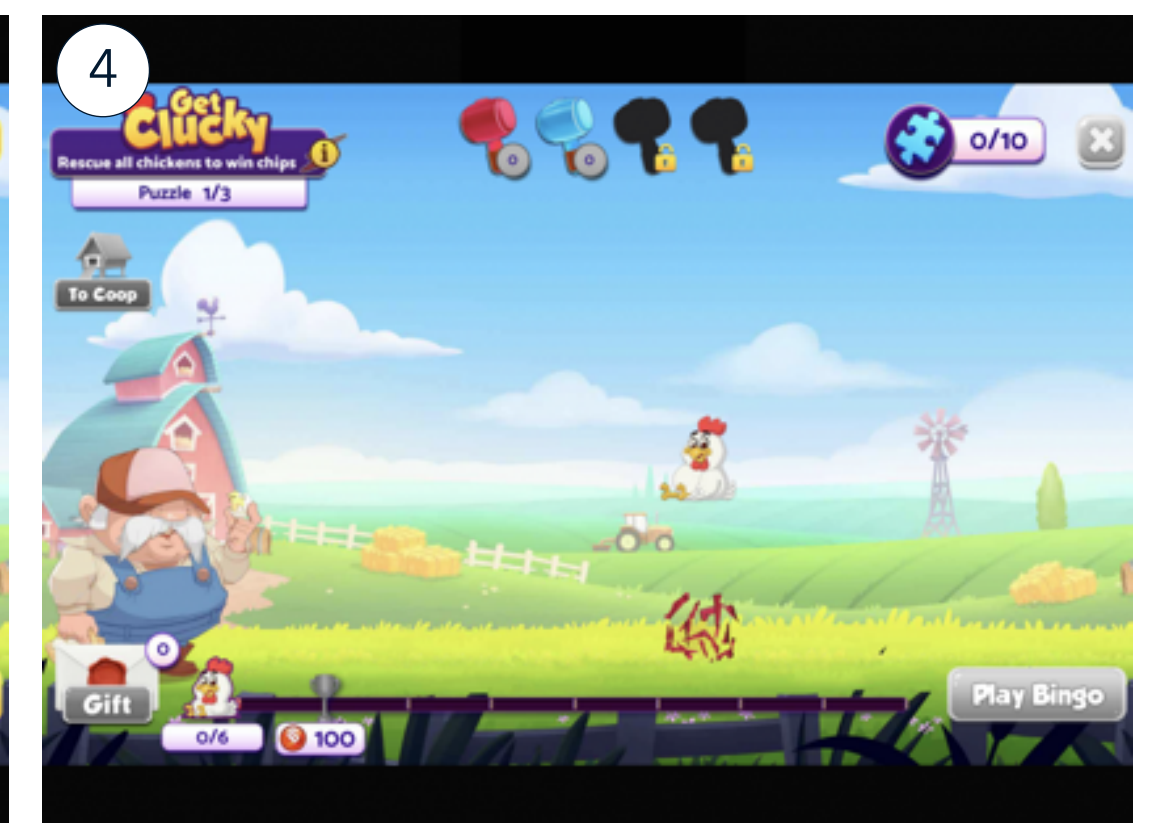
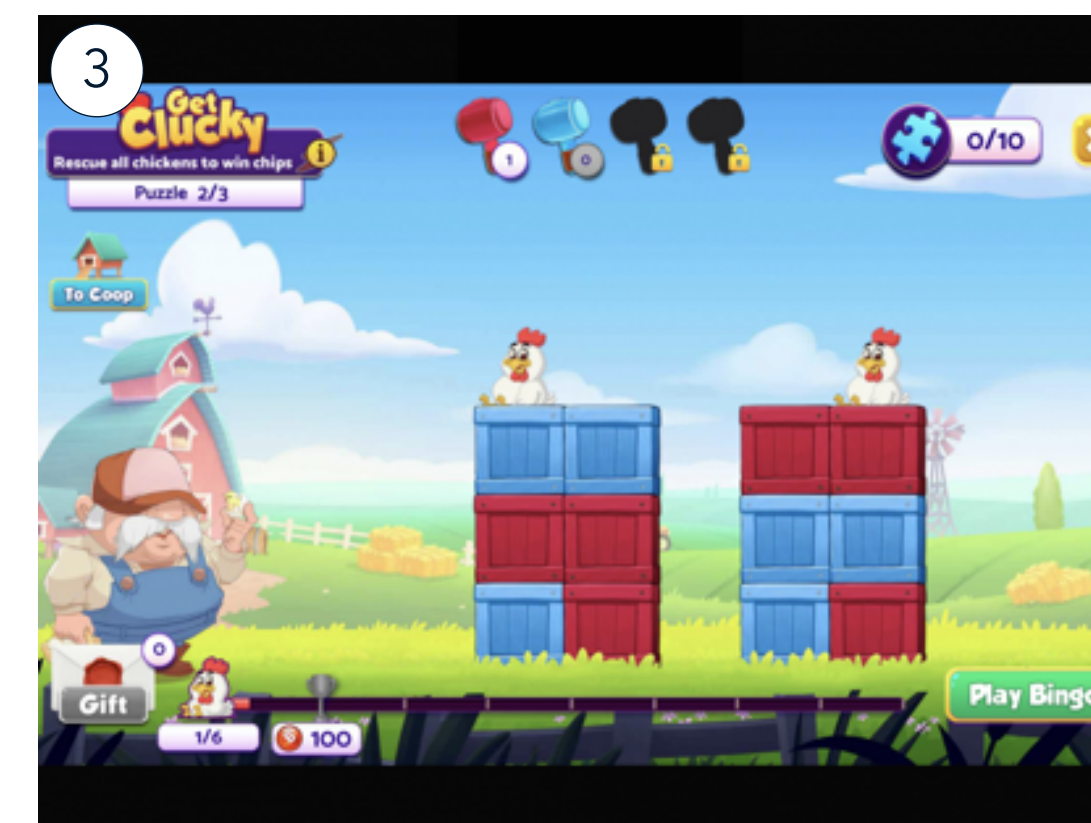
Bingos award hammers that players use to break crates in a puzzle mini-game.

Details

- Players daub cells to reveal pennies and clear a path for a farmer (1 and video).
- Collecting five pennies with the farmer awards a bingo.
- Bingos grant one of four colored hammers (2).
- Hammers are used to break same-colored crates in a mini-game.
 - Stacks of colored crates hold up chickens (3).
 - Hammers break all connected crates of the same color.
 - Chickens are collected when they reach the ground (4).
 - Collecting all chickens completes the level (5).
- Completed levels unlock additional hammer colors.
- Levels award increasing numbers of chests at intervals (6).
- Chickens fill a meter for rewards at milestones.

Additional Information

- See the [Get Clucky](#) Library for more images and videos.



PRODUCT INSIGHTS

Bingo players enjoy collection bonuses and believe that they can control game outcomes.

[Get Clucky](#)'s hammer collection and crate-breaking bonus appeals most to Sensation Serena player types, who have the greatest preference for both bingo play and collection bonuses. Notably, these players also believe strongly in their ability to control outcomes. Adding elements of control to bingo games—like puzzles or Deal or No Deal bonuses—will likely increase engagement from these players.¹

Perceived agency increases engagement and retention.

The simple puzzles in [Get Clucky](#) offer a sense of agency in an otherwise chance-based game. While these levels are not particularly complex, the correct choices allow players to complete them using the fewest hammers possible ([1](#)).

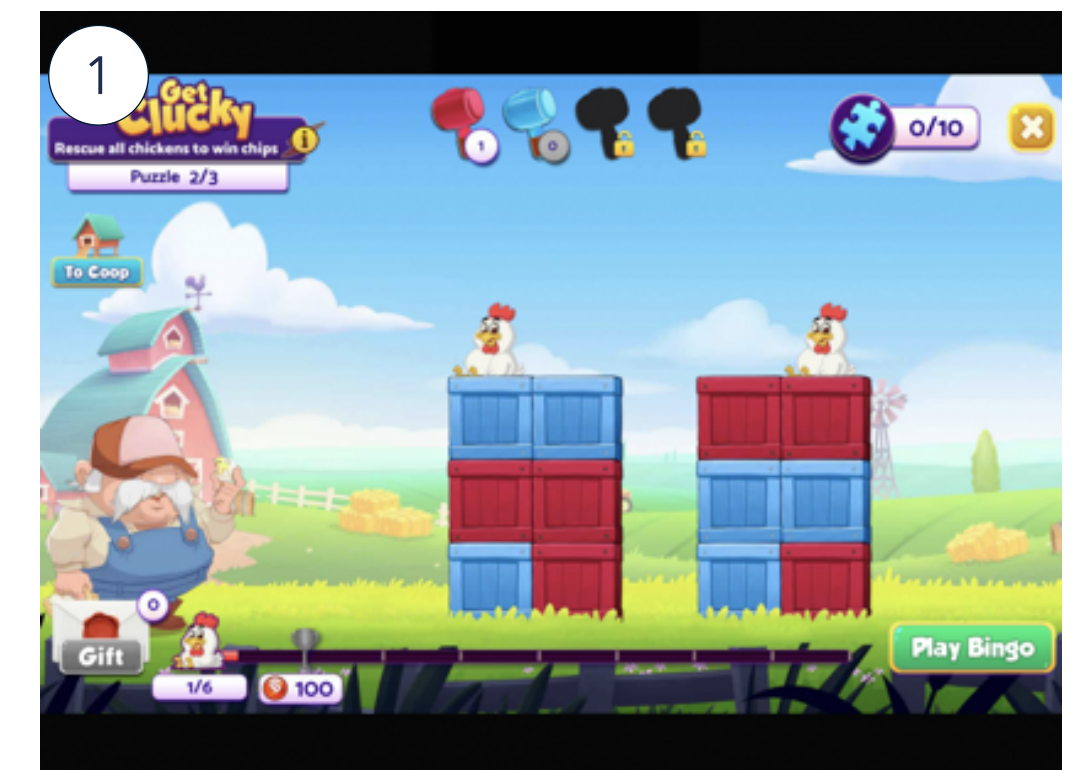
Research has found that perceived agency can greatly alter the way players experience games of chance. In one study, adding a stopping device to a slots video game caused 58% of participants to believe that they were affecting outcomes and 32% to believe that stopping spins increased their winnings—*despite having the same win rate* as a control group without the stopping device. Most importantly, players with the stopping device played nearly twice as many games as the control group over a six-month period.²

These changes in perception can also lead to more spending. Other research has demonstrated that perceived agency improves player confidence and is strongly correlated with a greater willingness to make purchases in order to exercise control.³ Consider offering purchasable boosts when perceived agency is high, like during choice-based bonuses.

Agency is inherently rewarding.

[Bingo Bash](#) has had success with puzzle-style reward stages before: In [Merry Maze](#), which saw revenue increase +29% WoW, players collected tools to overcome obstacles while navigating simple maze levels ([2](#)).

Multiple studies have found that players will pursue agency regardless of whether their actions are rewarded. In fact, players will even make choices that *decrease* the chance of rewards just because they can—suggesting that agency acts as a reward in itself.⁴ In light of this, introducing agency to reward stages in the form of mini-games or pick'ems may create a doubly satisfying experience.



¹ [Liquid & Grit Slots Personas Report](#), p. 28-34

³ [Let me take the wheel: Illusory control and sense of agency](#), "Discussion"

² [Structural Characteristics of Video Lotteries: Effects of a Stopping Device](#) ⁴ [I control therefore I do: Judgments of agency influence action selection](#), p. 129-130
[on Illusion of Control and Gambling Persistence](#), p. 128-129

TRENDS



Investment trends for features and events

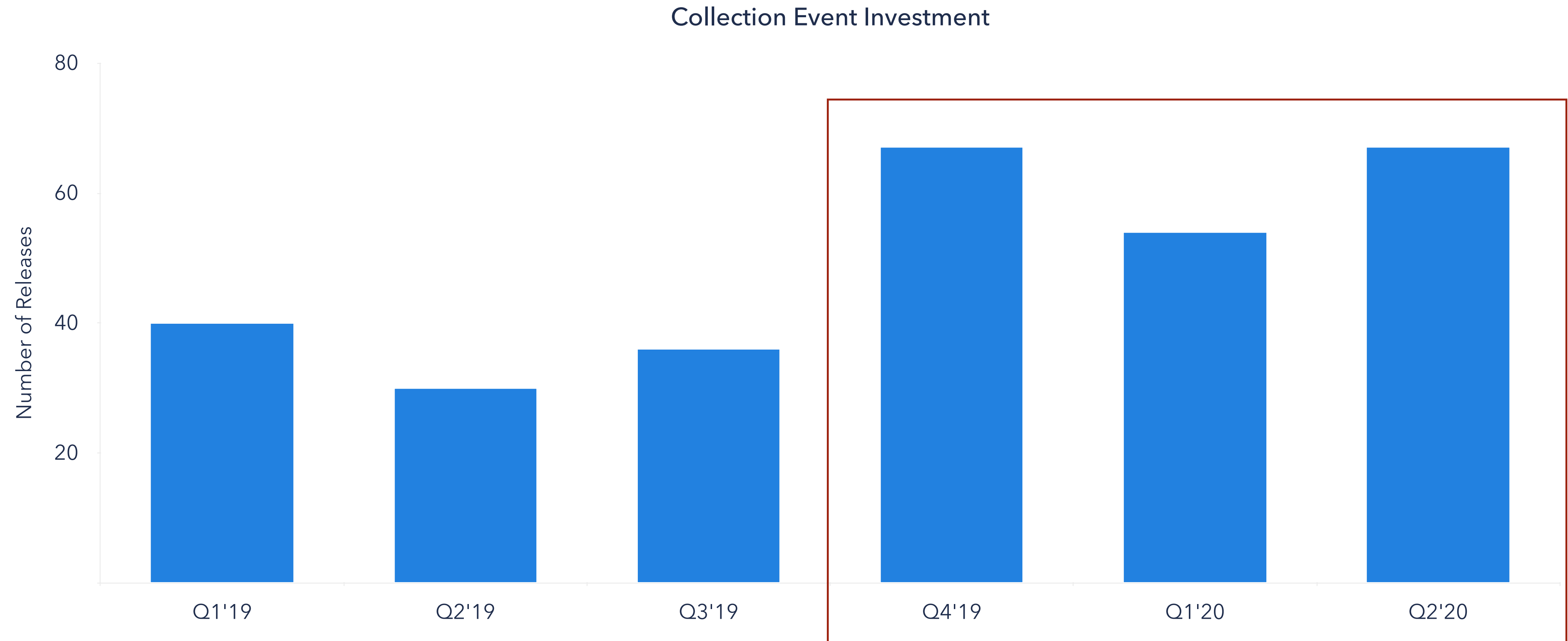
Slots apps: *Big Fish Casino, Caesars Slots, Cash Frenzy, Cashman Casino, DoubleDown Casino, DoubleU Casino, Game of Thrones Slots, Gold Fish Casino, Heart of Vegas, Hit It Rich!, House of Fun, Huuuge Casino, Jackpot Magic Slots, Jackpot Party, Lightning Link Casino, Lotsa Slots, my KONAMI, myVEGAS,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

Bingo apps: *Bingo Bash, Bingo Blitz, Bingo Party, Bingo Pop, and Bingo Showdown*

Poker apps: *Governor of Poker 3, Mega Hit Poker, Poker Heat: Texas Holdem Poker, Pokerist, WSOP, and Zynga Poker - Texas Holdem*

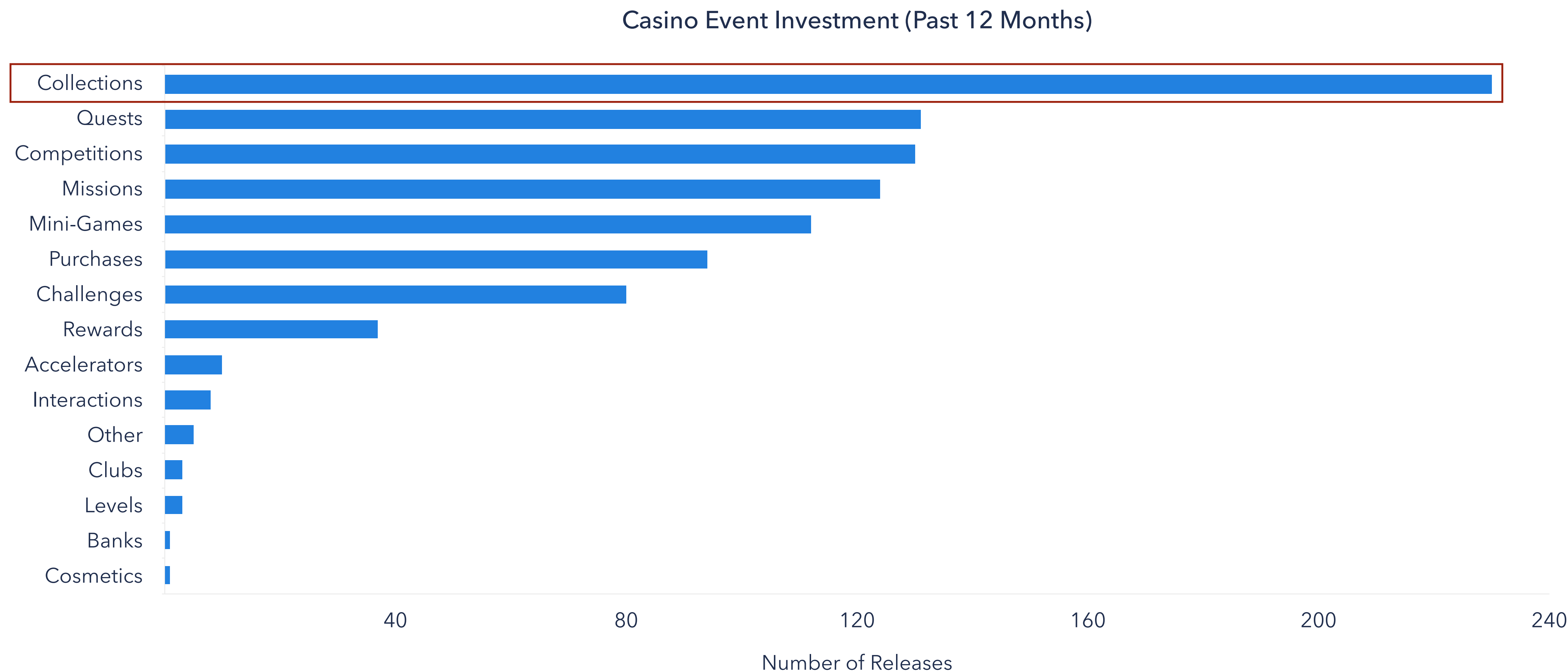
COLLECTION EVENTS ARE GROWING

Tracked casino apps released an average of 62 collection events per quarter for the past three quarters—a +77% increase over the three preceding quarters.



COLLECTION EVENTS DOMINATE CASINO RELEASES

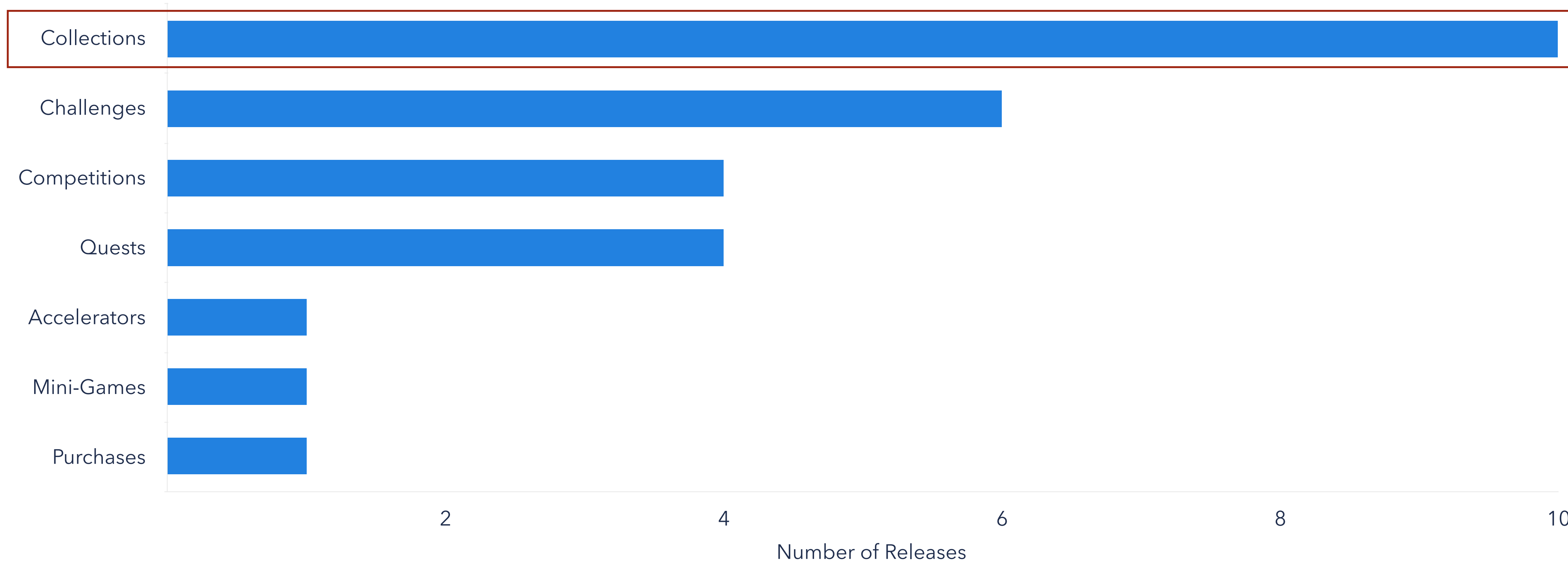
Collections are the most frequently released casino events by far, nearly doubling the next most common event type and making up 24% of all events released in the past year.



BINGO BASH FAVORS COLLECTIONS AND CHALLENGES

Bingo Bash released an above-average proportion of collection events in the past year. Collections accounted for 37% of its events compared to the 24% genre-wide average. Challenge events were *Bingo Bash's* second most common event type despite ranking seventh across the genre.

Bingo Bash Event Investment (Past 12 Months)



MARKET WATCH



New apps and notable releases from established competitors

BREAKOUT APP I

Golden HoYeah's revenue collapsed in 2017 before beginning to climb again in 2018.

This growth was driven largely by China and Japan, which replaced Australia and the U.S. as the app's largest sources of revenue. Combined annual revenue from China and Japan increased by more than +2,500% between Jul '16-Jun '17 and Jul '19-Jun '20.

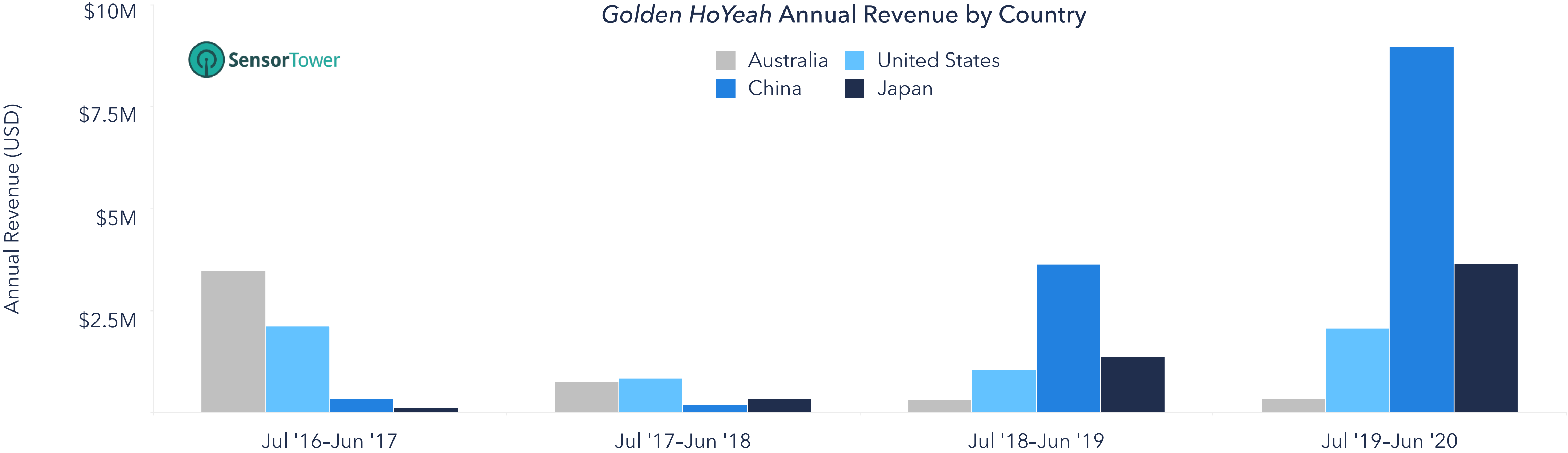
Golden HoYeah by International Games System

App Details

- Machines and rooms feature East Asian themes.
- Gameplay includes traditional slot machines and action arcade machines with betting mechanics.

Launch Information

- Originally released as *FaFaFa Real Slots*, renamed *Golden HoYeah* around October 2017
- 60th highest-grossing casino app as of 7/1/20
- View all *Golden HoYeah* galleries in the [Feature Database](#)



BREAKOUT APP II

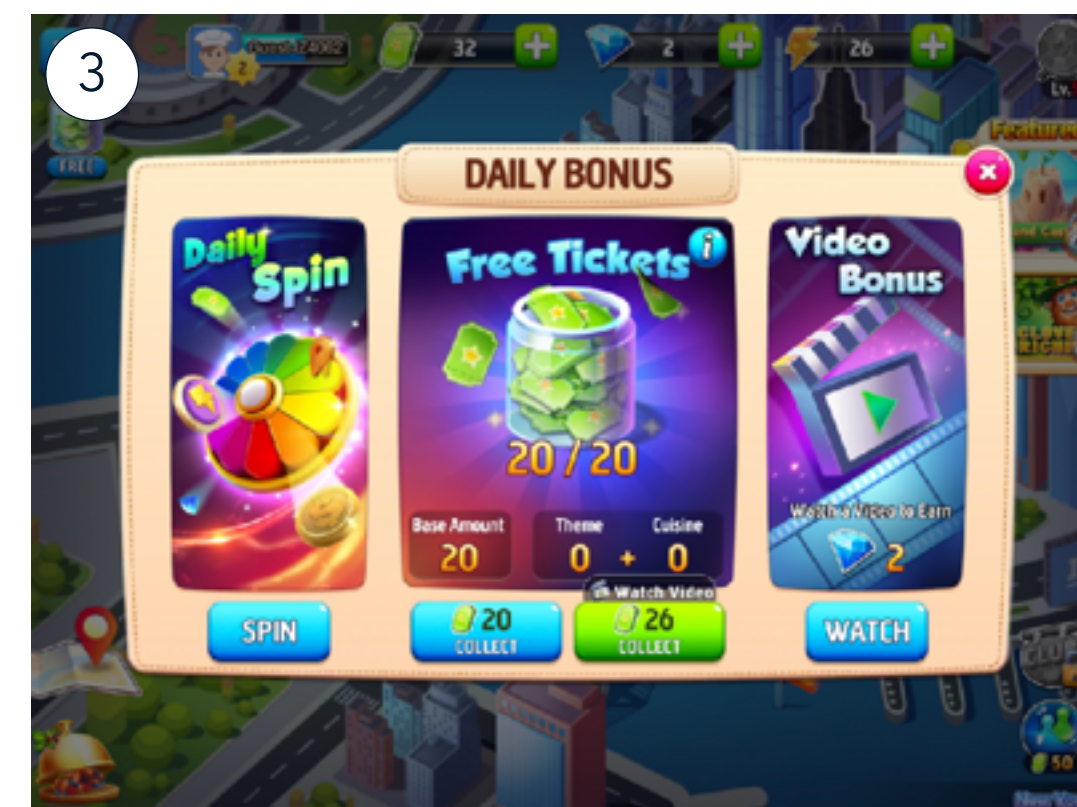
Bingo Cooking by Gluon Interactive

App Details

- Unlockable map locations award ingredients for recipes (1).
 - Completed recipes award two currencies: tickets and diamonds (2).
- Players can land multiple bingos on a single card.
- Daily bonuses include a wheel spin, a ticket collection with an optional rewarded ad, and a rewarded ad for diamonds (3).
 - Completed map locations increase daily bonus benefits.
- A home screen shows levels, recipes, bet-up jackpots, daily bonuses, and a leaderboard (4 and [video](#)).
- A store offers bundles of boosts and currency for cash or diamonds.
 - VIP levels increase store rewards.

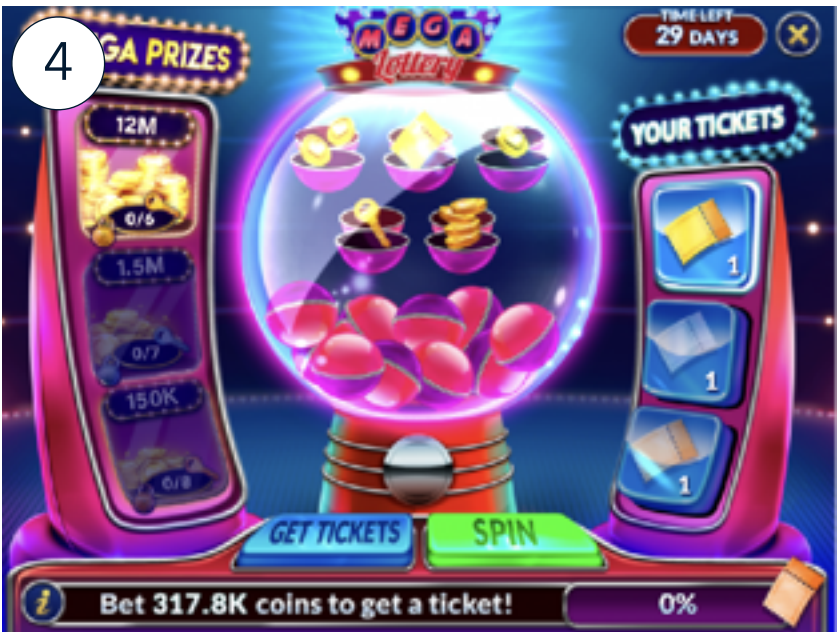
Launch Information

- Released worldwide on 3/15/20
- Average daily revenue (U.S., 90 days): \$2,668
- Average daily downloads (U.S., 90 days): 1,664
- View *Bingo Cooking* on the [App Store](#)



NOTABLE RELEASES I

App	Release	Description
DoubleU Casino	Plumber's Way collection event	<ul style="list-style-type: none">Base game wins fill a meter for pipes.Players connect pipes in a series of levels for rewards (1 and video).
Gold Fish Casino	Tiki's Island Hop bonus feature	<ul style="list-style-type: none">Lion head symbols fill a meter for a daily pick'em bonus.Coins advance players on a map (video).Crabs decrease winnings.Players can leave with their current reward or continue playing (2).Checkpoints save players' progress.Lava bombs end the bonus and award the prize from the most recent checkpoint.Filling the meter a second time doubles the next day's bonus.
Governor of Poker 3	Party Cash Game competition event	<ul style="list-style-type: none">Invite-only poker games let friends play together.Games do not award team points, XP, or progress (3).
Heart of Vegas	Mega Lottery mini-game event	<ul style="list-style-type: none">Players earn tickets from spins or purchases.Tickets are used to buy pulls from a gacha vending machine (4 and video).
	Winning Streak mission event	<ul style="list-style-type: none">Players complete win-streak challenges on different machines for rewards.Store purchases automatically complete the current challenge.



NOTABLE RELEASES II

App	Release	Description
POP! Slots	Jackpot Rush! mini-game event	<ul style="list-style-type: none">• Players tap balloons during spins to fill a meter.• Filling the meter awards turns on a gameboard.• Turns add prize spaces to the board or award dice rolls (1 and video).• Spaces award cash, extra turns, board boosts, and jackpot upgrades (video).
Scatter Slots	Scatter Champions Royal Chronicles collection feature	<ul style="list-style-type: none">• Players collect cards from spins and purchases to complete hero-themed albums (2).• Completing all albums awards a grand prize.
Slotomania	SlotoCity Album collection feature	<ul style="list-style-type: none">• Players collect cards from spins, levels, purchases, challenges, gifts, chests, promos, and a daily pick'em bonus.• Wild cards let players choose any card.• Shiny cards can be exchanged for double coins on a prize wheel.• Ace cards award spins on a mini-stepper with guaranteed wins.• Completed albums award coins.• A daily pick'em bonus awards cards, shiny cards, gems, and coins (3).• Players can spend gems for additional picks.
WSOP	Bounty Series competition event	<ul style="list-style-type: none">• Players earn an event-exclusive bracelet by winning three tournaments or completing daily missions (4).

Quickly review all features and machines

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

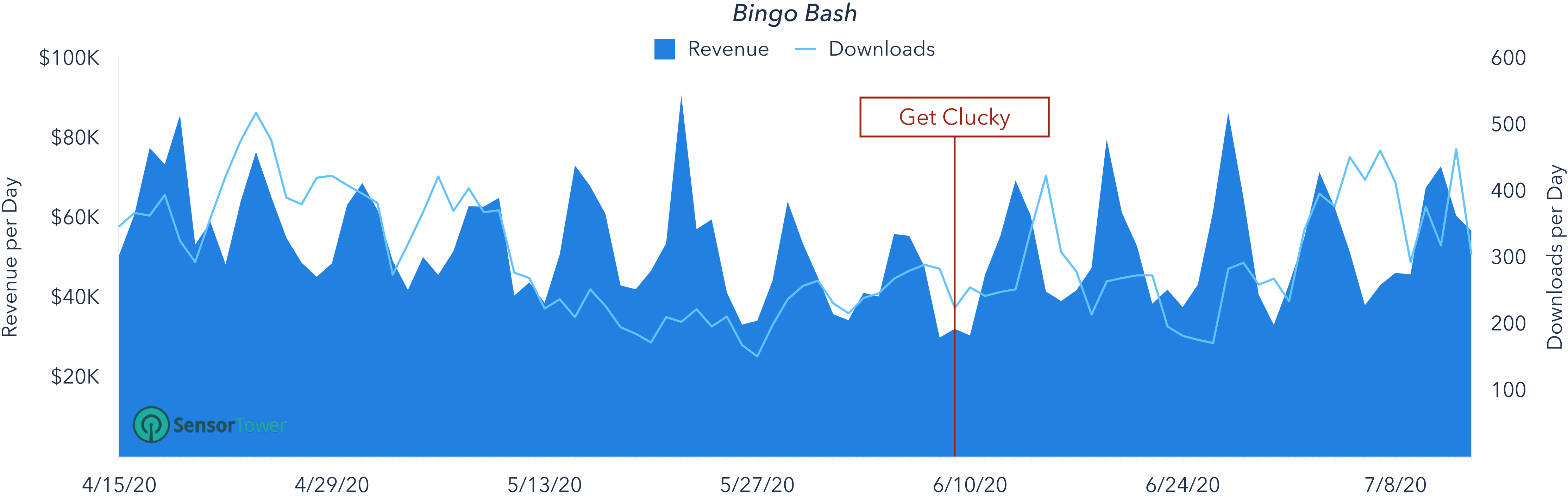


APPENDIX



BINGO BASH RELEASE SCHEDULE

Releases	
6/4-6/11: Holiday Memories collection event	• \$0.99 Starter Pack of Bingo Royale IAP +1 to #6
6/9: Get Clucky expansion feature	• \$19.99 High Roller Pack 4 of Bingo Chips IAP +1 to #7
6/9: Hoppy's Daily Specials purchase event	• \$4.99 Money Ball Combo Pack IAP +1 to #8
6/9:	• \$0.99 Bonus Pack of 3 Spins IAP +1 to #9
• \$9.99 Double Bet Pack 4 of Bingo Chips IAP +1 to #4	• \$1.99 Flyer Pack 4 of Bingo Chips IAP to #10 (NPL)
• \$1.99 Pack 2 IAP +1 to #5	*NPL = Not previously listed



Graph data is iOS U.S. only.

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 new user flows, 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 in-app items
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)

“Genius hesitates.”
– Carlo Rovelli

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