



**LIQUID&GRIT**

## **CASINO REPORT**

Competitive Research and Actionable Product Recommendations

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# OCTOBER

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# 2020

# IMPACT DRIVER



Product data, research, and recommendations for impactful releases



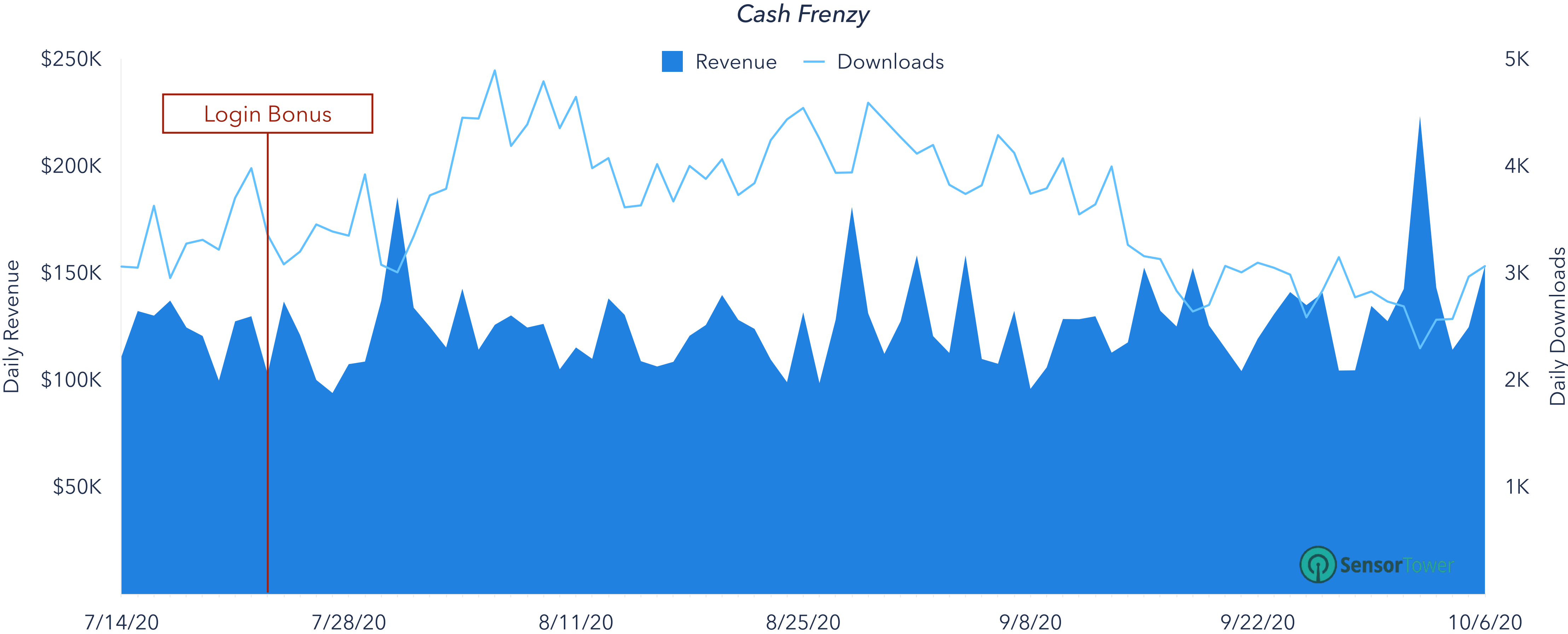
CASINO > FEATURES > BONUSES

## Hybrid Daily Login Calendar

Login Bonus in *Cash Frenzy*

# REVENUE ANALYSIS

Cash Frenzy's revenue was +5% and downloads were +34% MoM after the release of the Login Bonus feature. This trend continued into the next month, with revenue +6% and downloads +56% 2Mo2M.



MoM = Month over month. 2Mo2M = 2 months over 2 months.  
Graph data is iOS, U.S. only.



# FEATURE TEARDOWN

A login bonus combines a seven-day progression of streak rewards with a cumulative meter that awards chests at milestones.

## Details

- Consecutive daily logins grant increasing rewards for seven days ([1](#) and [video](#)).
  - The daily login progression resets if players miss a day or collect all seven rewards.
- Each claimed day fills a meter ([2](#)).
  - Claimed days do not need to be consecutive.
  - Meter milestones award chests at 8, 15, 22, and 30 days ([3](#)).
  - The meter resets when players collect the 30-day chest ([4](#)).

## Additional Information

- See the [Login Bonus](#) library for more images and videos.





# PRODUCT INSIGHTS

This month, we interviewed four *Cash Frenzy* players who spend \$30-\$500 per month.

## Combine streaks and cumulative goals to motivate players at a wide range of engagement levels.

Studies show that streak bonuses are great for retention, more so than other mechanics like leaderboards.<sup>1</sup> Some players we interviewed even set daily reminders on their phones,<sup>2</sup> and all said they continue their sessions after claiming rewards.

However, those who lose their streaks may feel demotivated by having to "start all over again."<sup>3</sup> *Cash Frenzy* mitigates this disappointment by also filling a cumulative chest meter, giving those players another goal to focus on.

Consider further softening streak requirements by allowing players to claim missed days with in-game currency or an IAP, like in *Cookie Jam*'s [Cookie Calendar](#). One high-spender told us that she "always goes back to make up for the day that [she] missed" in other apps with those offers.<sup>4</sup> Another said that such an option would be "game-changing."<sup>5</sup>

## Rewards that are directly tied to core progressions have the greatest impact.

A study of mobile games found that long-term progression goals are key to retention and that daily login rewards alone are not enough.<sup>6</sup> To this end, the larger login rewards contain puzzle pieces for *Cash Frenzy*'s core collection feature, linking the daily bonus progression with players' greater goals (1). Large XP boosts in high-level chests may further enhance this connection, something specifically mentioned by one medium-spending player we interviewed.<sup>7</sup>

## Use size, space, and shape to create clear reward hierarchies.

Despite steadily growing in value, all daily reward boxes are the same size in the bonus interface until day 7, and all chests look the same until day 30. One player specifically called out that chests, which represent larger rewards, are given significantly less page space than the daily rewards: "They don't pop out at you."<sup>8</sup>

Visual design hierarchies of size, spacing, and shape can help ensure that rewards *appear* more valuable beyond just their utility.<sup>9</sup> This will not only improve interfaces' legibility but may also make rewards more desirable, as research has found that people have a strong preference for visual novelty in objects.<sup>10</sup> The players we interviewed concurred: "You want novelty to make it special."<sup>11</sup> For example, *Angry Birds 2*'s [hat upgrades](#) become more visually complex with each level (2).



<sup>1</sup> [Game mechanics' effects on user retention](#), p. 21-24

<sup>2</sup> Subject A; Age 33 male, \$400/month spend, 50 hours/week playtime  
Subject B; Age 20 female, \$30/month spend, 15 hours/week playtime

<sup>3</sup> Subject C; Age 47 female, \$400-\$500/month spend, 70 hours/week playtime

<sup>4</sup> Subject C (\$400-\$500/month spend)

<sup>5</sup> Subject A (\$400/month spend)

<sup>6</sup> [Retention in Free-To-Play Mobile Games](#), p. 102-104

<sup>7</sup> Subject B (\$30/month spend)

<sup>8</sup> Subject C (\$400-\$500/month spend)

<sup>9</sup> [Fundamentals of Hierarchy in Interface Design \(UI\)](#)

<sup>10</sup> [Roles of familiarity and novelty in visual preference...](#)

<sup>11</sup> Subject A (\$400/month spend)

# 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*

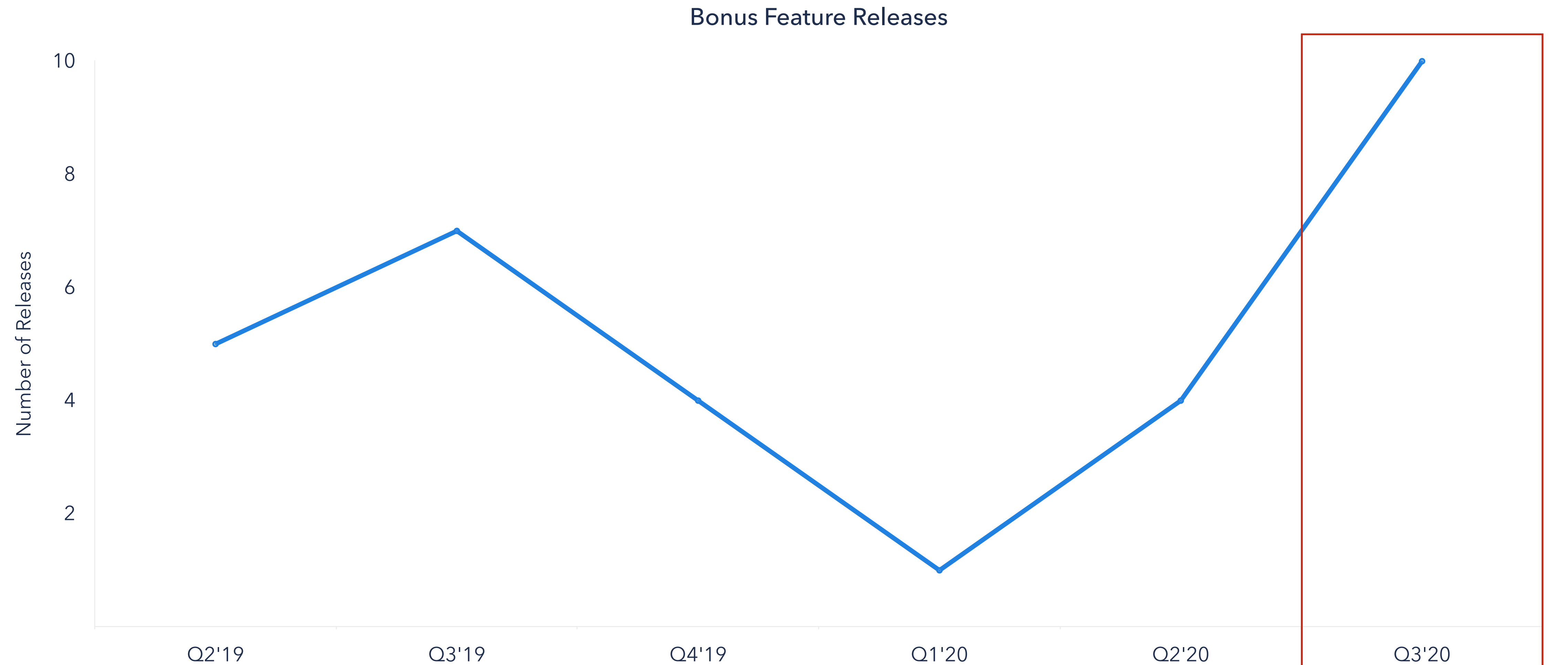
**Bingo apps:** *Bingo Bash, Bingo Blitz, Bingo Party, Bingo Pop, and Bingo Showdown*

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



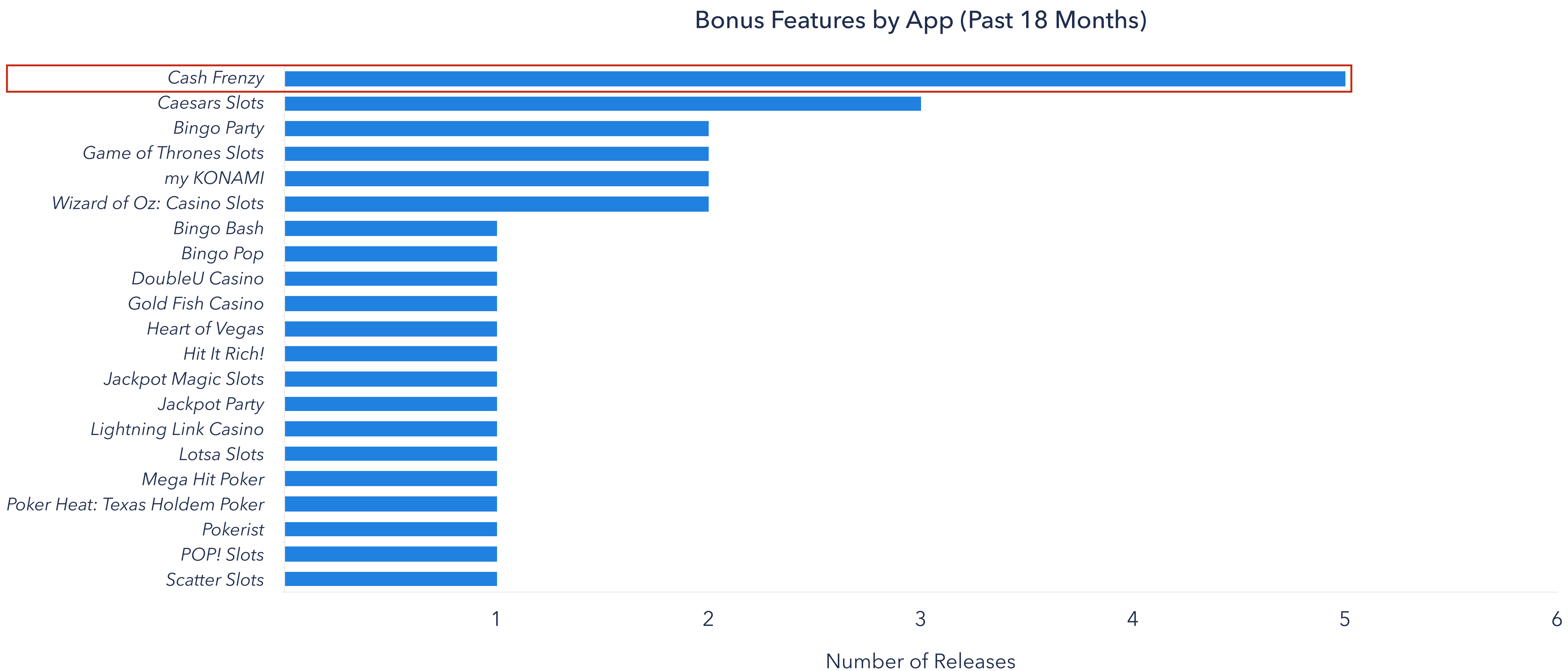
# BONUS FEATURES BOUNCE BACK

After declining through Q1'20, bonus features hit an 18-month high in Q3'20 with 10 releases.



# CASH FRENZY RELEASES THE MOST BONUS FEATURES

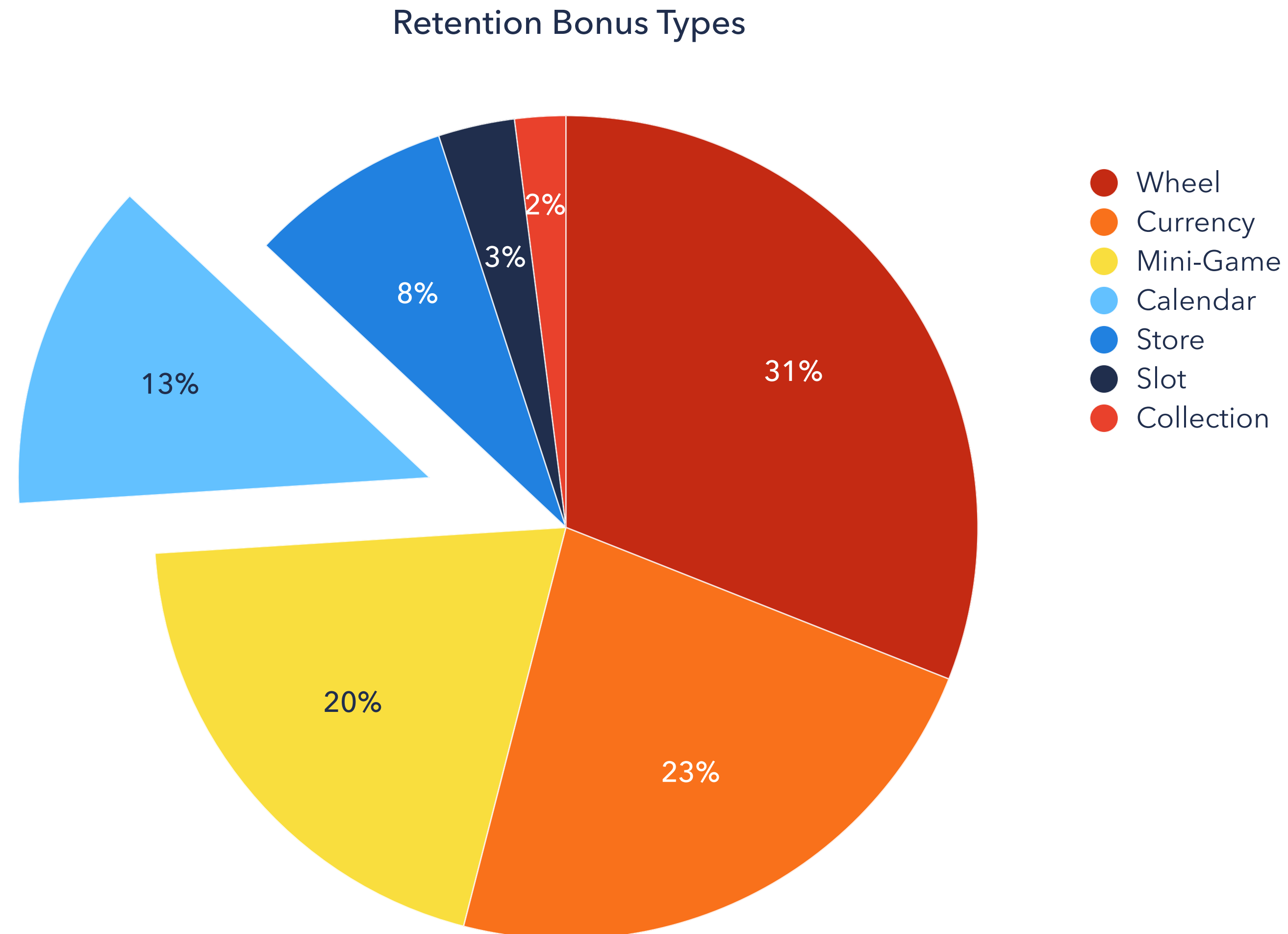
Cash Frenzy releases more than twice as many bonus features as every other tracked app besides Caesars Slots. Among apps that released bonus features in the past 18 months, 70% released just one.





# CASINO APPS OFFER DIVERSE RETENTION BONUSES

Calendar bonuses represent the median percentage of retention bonus types. Wheel and currency bonuses (free currency that players can claim) make up over half of all retention bonuses.



# CALENDAR BONUSES RUN THE LONGEST

While the overwhelming majority of casino retention bonuses reset every day, 28% last three days or longer and 17% last one week or more. All but one of the one-week or longer bonuses use streaks.

One-Week or Longer Retention Bonuses				
App	Feature	Type	Days	Streak
Governor of Poker 3	<a href="#">Under the Sea</a>	Calendar	47	Yes
Cash Frenzy	<a href="#">Login Bonus</a>	Calendar	30	Yes
Quick Hit Slots	<a href="#">Bonus Quest</a>	Calendar	30	Yes
Bingo Pop	<a href="#">Collect Rewards</a>	Calendar	28	No
Wizard of Oz: Casino Slots	<a href="#">Monthly Magic</a>	Calendar	28	Yes
Bingo Party	<a href="#">Balloon Blast</a>	Mini-Game	7	Yes
Bingo Pop	<a href="#">Daily Bonus</a>	Wheel	7	Yes
Cash Frenzy	<a href="#">Lucky Smash</a>	Mini-Game	7	Yes
DoubleU Casino	<a href="#">Free Spins</a>	Calendar	7	Yes
Lotsa Slots	<a href="#">Pop Party</a>	Mini-Game	7	Yes
WSOP	<a href="#">Daily Blitz</a>	Mini-Game	7	Yes



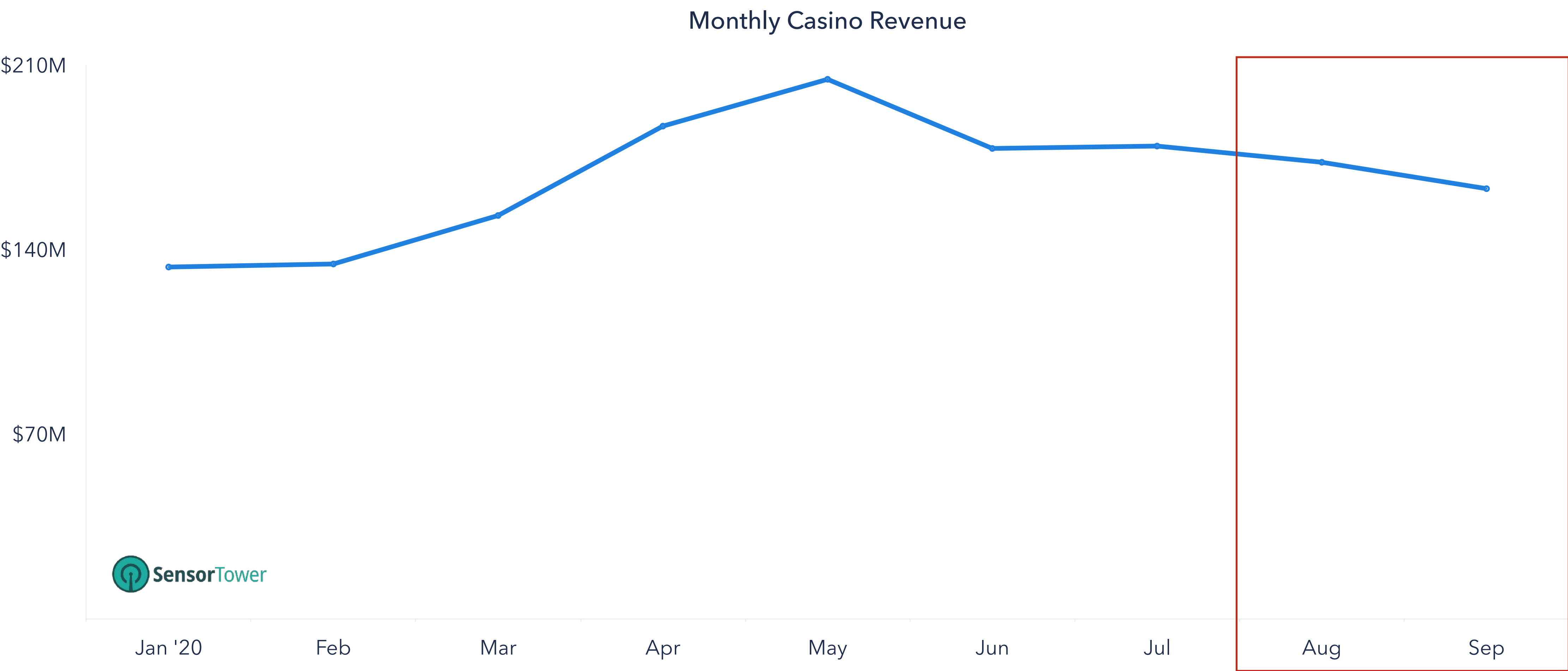
# REVENUE MOVEMENT



Revenue changes within apps and across genres

# CASINO REVENUE DECLINES

Although still above pre-COVID levels, monthly U.S. revenue in tracked casino apps has declined in the past two months.



Graph data is all platforms, U.S. only.



# MARKET WATCH



New apps and notable releases from established competitors

# BREAKOUT APPS I

## **Club Vegas Slots** by Bagelcode

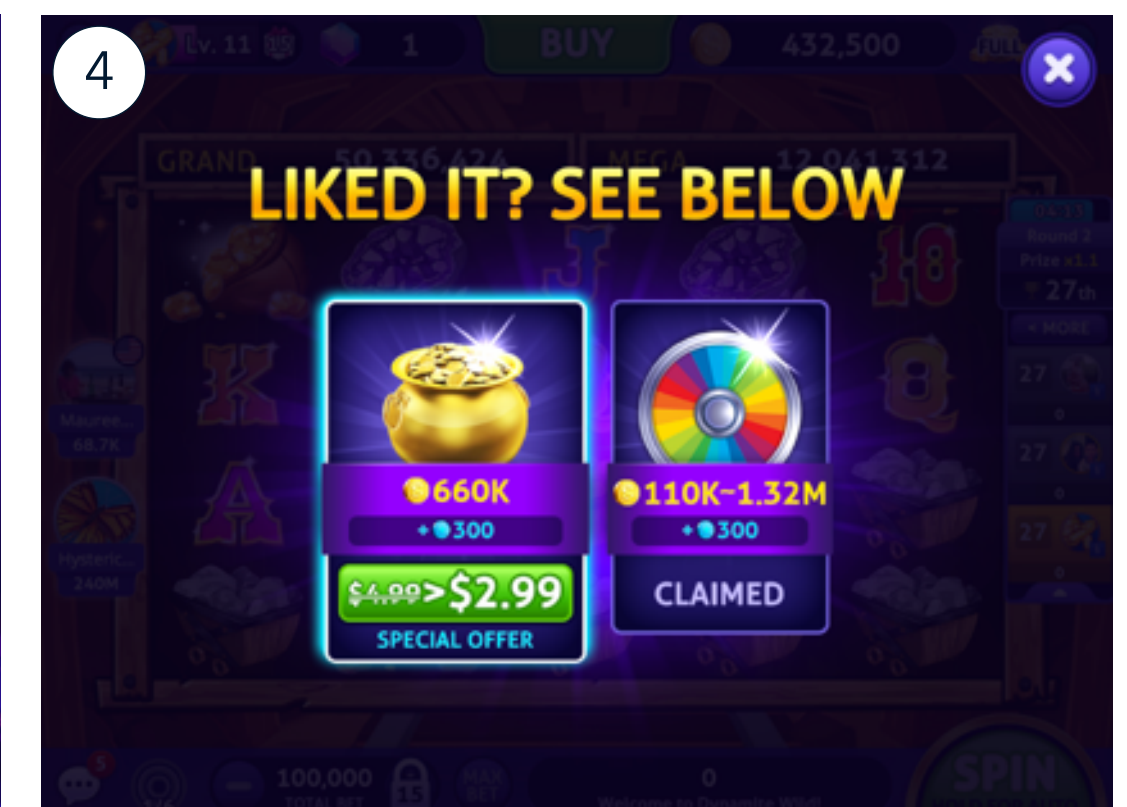
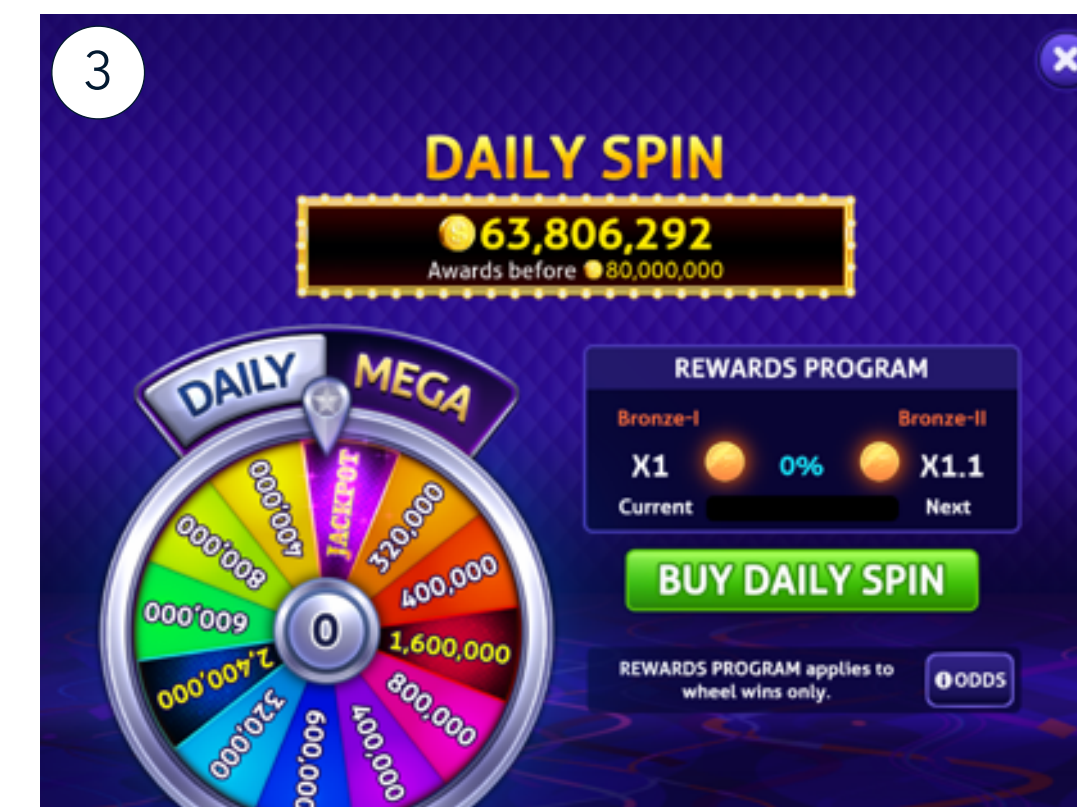
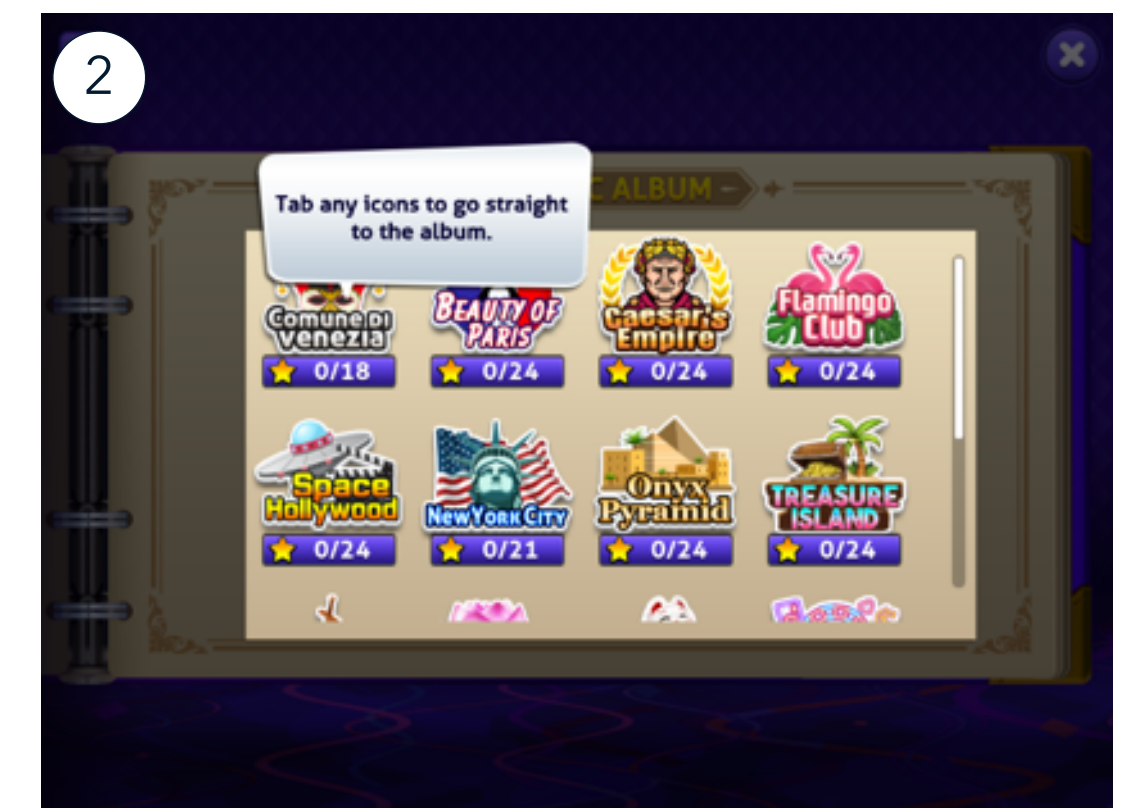
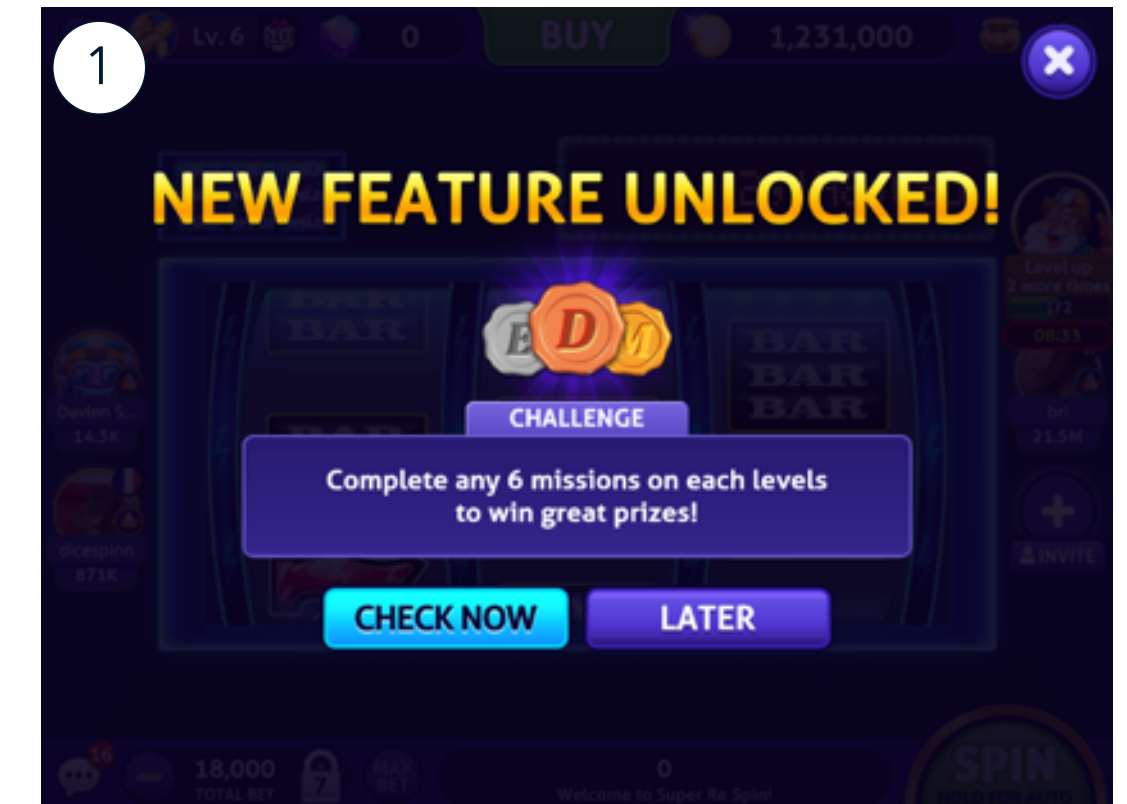
### App Details

- Unlocked features trigger notifications with brief tutorials (1).
- Big wins award stars for a collection feature (2).
  - Stars fill a meter for a secondary bonus currency.
- A \$4.99 daily bonus spin is the third-ranked IAP (3).
- A monthly \$9.99 early access subscription unlocks new content 10 days early and grants 20 daily bonus spins.
- A surprise gift lets players pick a reward and offers a discounted purchase of the unpicked option (4).

### Launch Information

- Released worldwide on 4/28/17
- 41<sup>st</sup> highest-grossing casino app as of 10/1/20
- Average daily U.S. revenue (90 days): \$30,686
- Average daily U.S. downloads (90 days): 4,394
- View *Club Vegas Slots* on the [App Store](#)

For more information on reward choice, check out our analysis of *Dragon Ball Legends*' [Daily Login Bonus Update](#) from the September RPG Report.





# BREAKOUT APPS II

## Vegas Live Slots by PurpleKiwii

### App Details

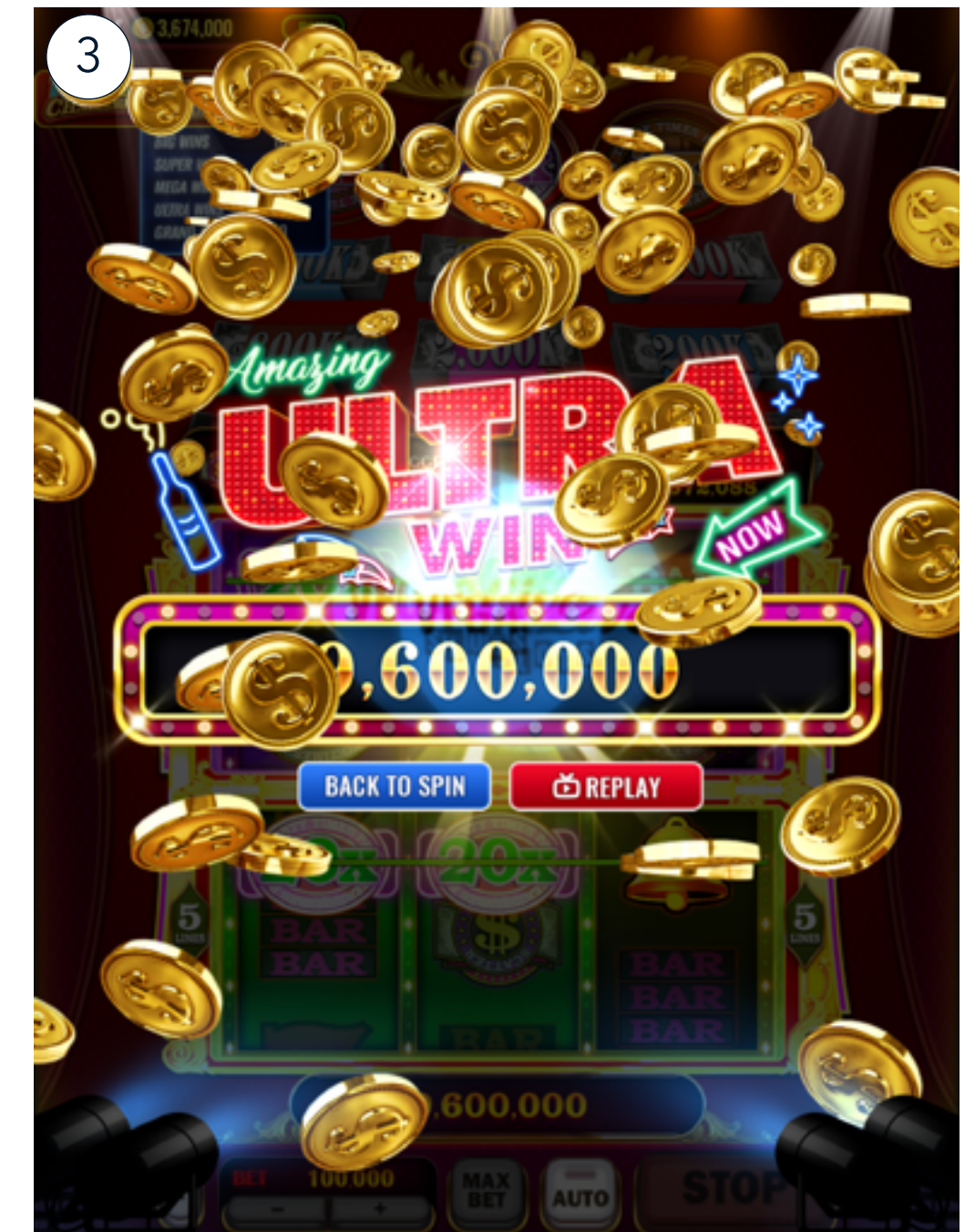
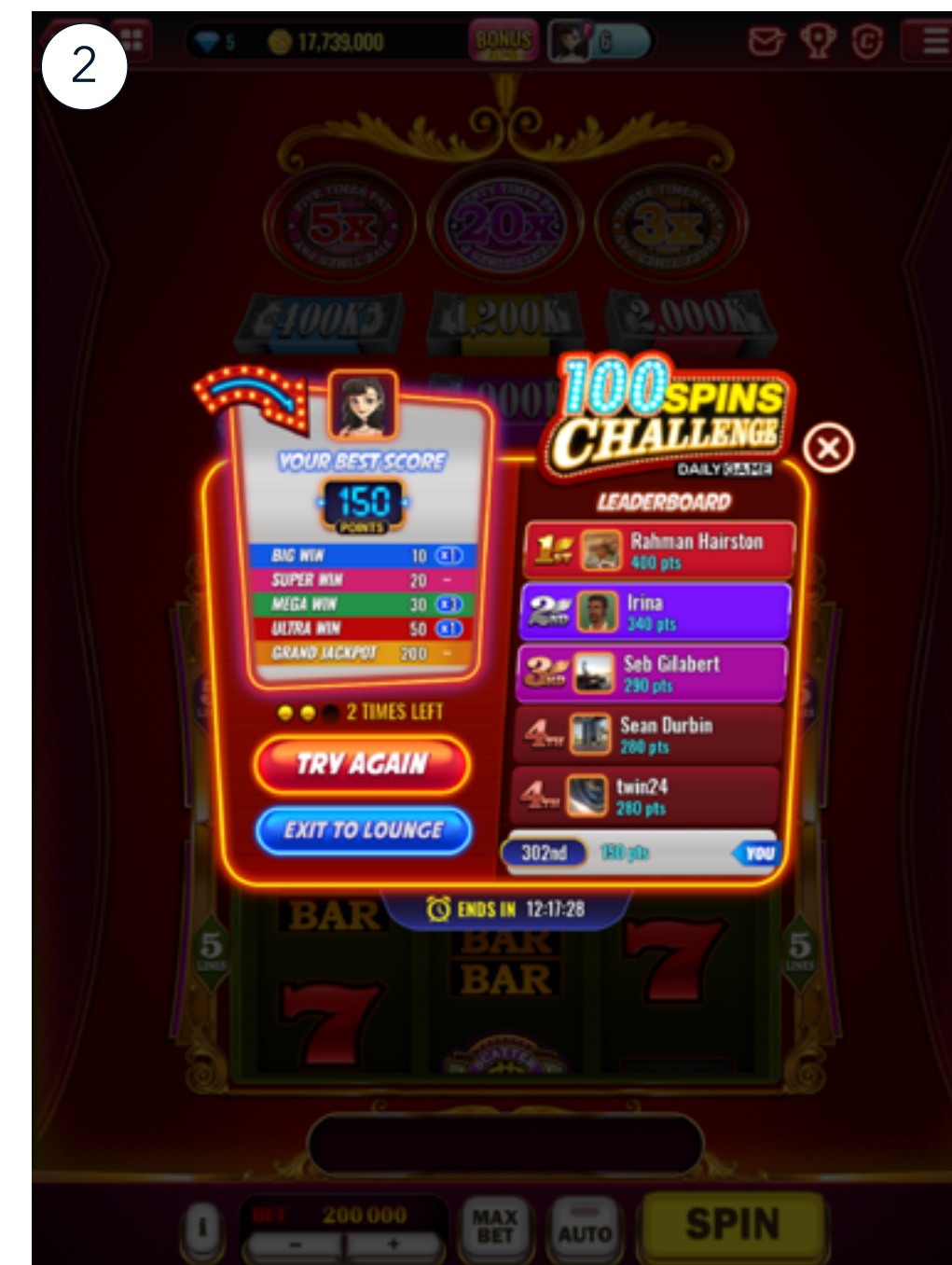
- Players can walk around play areas to navigate between machines and meta-features, collect coins, and interact with hosts and other players (1 and [video](#)).
  - The app also offers a traditional menu system.
- A lounge area includes a daily 100-spin challenge, a daily lottery, and a weekly competition (2).
- A daily bonus lets players keep spinning until they hit a stop symbol ([video](#)).
- Players can relive big wins with a video replay feature (3 and [video](#)).
- Three different collections—pets, cars, and badges—are awarded for XP progression, jackpots, and competitions, respectively (4).
  - Players with cars can drive instead of walking.

Rideable "mounts" are an RPG staple that appeals to multiple player types by combining social prestige, escapist fantasy, and functional advantages like increased movement speed.<sup>10</sup>

### Launch Information

- Released worldwide on 11/16/17
- 43<sup>rd</sup> highest-grossing casino app as of 10/1/20
- Average daily U.S. revenue (90 days): \$45,136
- Average daily U.S. downloads (90 days): 2,793
- View *Vegas Live Slots* on the [App Store](#)

<sup>10</sup> [Listed: Top 10 Mounts in MMORPGs](#)





# NOTABLE RELEASES I

App	Release	Description
<i>Bingo Blitz</i>	<a href="#">Andy Presents</a> bingo room content	<ul style="list-style-type: none"><li>• Players daub cells to fill a meter under each bingo board.</li><li>• Each completed meter adds a robot to that board.</li><li>• Robots daub extra cells, collect chests, and award credits (<a href="#">1</a> and <a href="#">video</a>).</li><li>• Bingos award batteries.</li><li>• Batteries fill a meter for rewards at milestones.</li></ul>
<i>Game of Thrones Slots</i>	<a href="#">Knights of the Seven Kingdoms</a> leaderboard event	<ul style="list-style-type: none"><li>• Big wins on any machine award points.</li><li>• Weekly leaderboards rank players based on points.</li><li>• At the end of the week, the highest-ranked player from each tier advances to the next tier.</li><li>• Higher ranks and tiers award better prizes and larger hourly bonuses (<a href="#">2</a> and <a href="#">video</a>).</li></ul>
<i>Huuuge Casino</i>	<a href="#">Casino Fever</a> collection feature	<ul style="list-style-type: none"><li>• Players earn resources from purchases, levels, daily logins, and special events.</li><li>• Resources are used to upgrade structures in a casino for rewards (<a href="#">3</a>).</li><li>• Upgrading all structures in a level awards a prize and unlocks the next level (<a href="#">video</a>).</li></ul>
	<a href="#">VIP Program</a> reward feature	<ul style="list-style-type: none"><li>• Qualified players receive an in-app offer to join a secret VIP program.</li><li>• Players must send an email or Facebook message to an account manager to join.</li><li>• Two private VIP Facebook groups offer faster support, biweekly chip prizes, promotions, and challenges.</li></ul>
<i>Lotsa Slots</i>	<a href="#">Level Devil</a> level event	<ul style="list-style-type: none"><li>• Leveling up 10 times within a time limit triggers a pick'em bonus (<a href="#">video</a>).</li><li>• Pick'em prizes include stamps, coins, and jackpots (<a href="#">4</a>).</li><li>• Finishing the bonus triggers a purchase offer for a second round with bigger rewards.</li></ul>





# NOTABLE RELEASES II

App	Release	Description
myVEGAS	<a href="#">Excalibur Dragon Hatch</a> collection event	<ul style="list-style-type: none"><li>Dragon symbols fill a meter.</li><li>A \$4.99 IAP bundle increases the meter's fill speed.</li><li>Completing the meter hatches a dragon egg for rewards (<a href="#">1</a> and <a href="#">video</a>).</li><li>Hatching all three dragon eggs awards a bonus prize.</li></ul>
Pokerist	<a href="#">Slots Status</a> mission feature	<ul style="list-style-type: none"><li>Players unlock a series of profile frames based on total winnings (<a href="#">2</a>).</li></ul>
POP! Slots	<a href="#">Luxury Lounge</a> other feature	<ul style="list-style-type: none"><li>A high-roller room features voice chat, raffles, purchase offers, and a maximum bet of 1 billion chips (<a href="#">3</a>).</li></ul>
Slotomania	<a href="#">The Time Sailors' Album Clans Edition</a> collection feature	<ul style="list-style-type: none"><li>Players collect cards from spins, chests, purchases, bonuses, level milestones, daily challenges, and more.</li><li>Non-duplicate cards are awarded to all club members (<a href="#">4</a>).</li><li>Ace cards fill all club members' ace card meters.</li><li>Completed albums award club points for chests and fill a meter for starter pack upgrades.</li><li>Completing the album awards a pick'em mini-game and a choice of any card.</li><li>Chosen cards are awarded to all club members.</li></ul>



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%
% Female	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
Playtime	5.0	4.5	5.0	4.9	6.5



\* The education, money spent, and playtime 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><b>Mobile App Store Intelligence</b></p> <p><a href="#">Sensor Tower website</a></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"><li>▸ Evaluate app economies and app vitality.</li><li>▸ Drive organic growth with the leading App Store optimization platform.</li><li>▸ Get the best global download and revenue estimates for the App Store and Google Play.</li><li>▸ Discover top creatives and better shape user acquisition strategy.</li></ul>	<p><b>Player Personas</b></p> <p><a href="#">Kinrate Analytics website</a></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><b>Market Research</b></p> <p><a href="#">Quadrant Strategies website</a></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
<a href="#">Accelerators</a>	Increases the power, impact, or efficiency of play
<a href="#">Banks</a>	Saves a % of spend that can be unlocked later
<a href="#">Bonuses</a>	Free bonuses given to players, often with time intervals
<a href="#">Challenges</a>	Goal-oriented tasks for players to complete
<a href="#">Clubs</a>	A group of players accomplishing goals or competing with other groups
<a href="#">Collections</a>	A set of items players collect, often for a completion prize
<a href="#">Competitions</a>	Players competing against other players
<a href="#">Cosmetics</a>	Improvements or updates to the app or a feature
<a href="#">Currencies</a>	Changes to currencies, economies, stores, and items
<a href="#">Expansions</a>	Additional rooms, worlds, play modes, VIP lounges, etc.
<a href="#">Flows</a>	Specific flows, like new user flows, ratings, and surveys

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

*“In my opinion, there is no aspect of reality beyond the reach of the human mind.”*

– Stephen Hawking

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