



LIQUID AND GRIT

SOCIAL CASINO REPORT

Competitive research and actionable recommendations for
product owners on innovations in social casino

JULY 2016

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INTRODUCTION



Dear Product Owner,

We begin this report with an overview of the slot machine content across the 30 top-grossing slots games. This section outlines opportunities in the slots content market within the categories of IP, machine type, progressive jackpots, mechanic complexity, content accessibility, and quality. It also highlights Hot Shot Casino Slots, breaking down three machines by RTP, bonus game hit rate, variability, and other mechanic-related data.

Henry Ford is credited with saying, “If I had asked people what they wanted, they would have said faster horses.” Although this logic is true, Henry Ford might not have asked the right questions. In this report, we explain how to use different marketing frameworks to build a diversified roadmap filled with both incremental wins, like faster horses, and new innovations, like the Ford Model T. Also, look out for information and research on RMG player types, motivations, and market research.

The Quick Wins section includes high ROI features in sales, community, and mini-game mechanics.

With Apple’s new 48 hour app-review turnout time, the Market Watch section has become even more important. Nearly all of the 30 top-grossing games had at least one update since last month. As a result, we adjusted our grading. Green dots are given only to major feature releases or multiple machines. We also added dedicated slides for major feature releases, like WSOP’s first release since November 2015.

The Economy Section breaks down Hot Shot Casino Slots, a game released by Phantom EFX (Scientific Games) in April 2016. The game is already the 34th top-grossing social casino game on iOS.

All the best,

Brett Nowak
Editor-in-Chief

SLOT CONTENT MARKET OVERVIEW: HOT SHOT CASINO SLOTS

HOT SHOT CASINO SLOTS

Hot Shot Casino Slots has a wide range of machine offerings that include many different mechanics and both real world and RMG IP

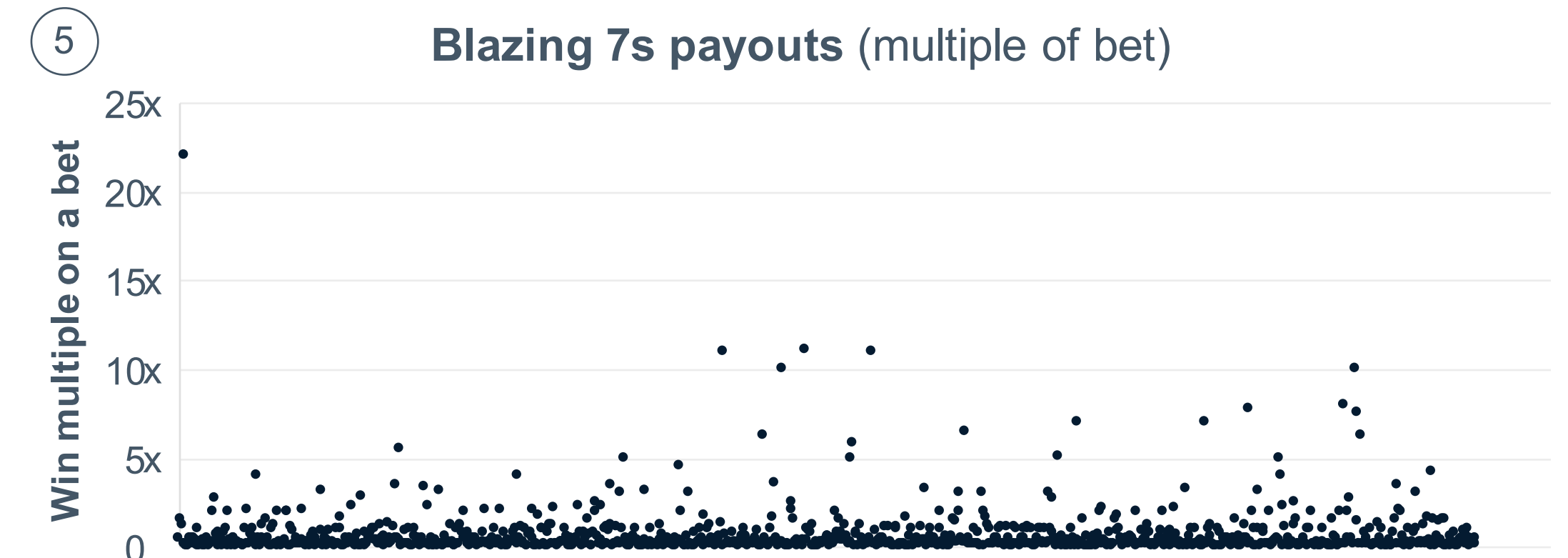
- The game starts out with a Bally's Classic: Blazing 7s. This 3 x 5 reel machine has simple art and limited animation (image 1).
- There is high-end, real world IP including KISS (image 2), Margaritaville, Van Helsing, Monopoly, Cheers, Dean Martin's Wild Party, Alice & The Enchanted Mirror, Betty Boop, Yahtzee, and Bruce Lee.
- Five progressive jackpots are accessible to all players upon starting the game (image 3).
- The qualifying bet amount for a progressive jackpot is expensive: \$10 to \$50 per bet (image 4).
- Level progression is very fast. Some of the machines are unlocked at high levels, like Bruce Lee at level 3,000 and Gold Mine at level 3,500 (image 5).
- The game also offers 88 Fortune, the #1 game in Asia according to Hot Shot Casino Slots (image 6).
- **The first three machines are Blazing 7s, Nemo's Voyage, and Raging Rhino, which are all analyzed in this report.**



BLAZING 7s

Blazing 7s (Hot Shot Casino Slots) has a 69% RTP, 79% of spins win, and 1 in 21 spins are a scatter bonus

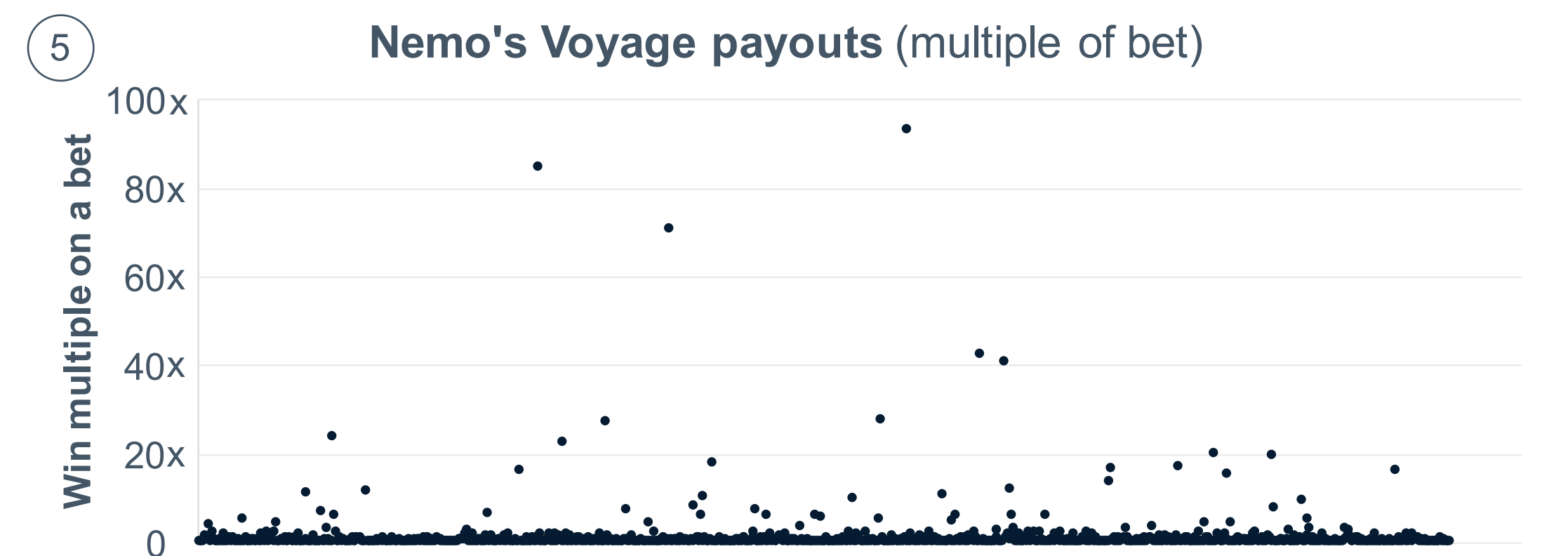
- **Mechanics:** The machine is a classic (image 1). There is an in-reel scatter bonus (images 2 & 3) that triggers a spin from each three reel machine in each reel. Big wins trigger a Big Win dialogue (image 4).
- **69% total RTP:** After 1,000 machine spins, the RTP ended up much lower than real world machines (which are typically above 90%). This could be due to other coin inputs, like coin bonuses.
- **79% of spins win:** There are a lot of small but regular wins in this machine, many of which were smaller than the bet amount.
- **1 in 21 spins are bonus wins:** This is a fairly frequent hit rate for the bonus game but given the low payouts of the bonus game, this makes sense.
- **16% bonus game RTP (included in total RTP):** 23% of the total RTP is given out in the bonus game. The bonus game is a fun and simple, yet unique.
- **22x is max win:** One large win, which you can see in the Blazing 7s payouts graph, was 22x bet (image 5). The second highest win was almost half that at 11x bet, but this win amount was more common at 0.5% of the spins.
- **Variability is low with a standard deviation of 1.41 of bet multiples:** This is the standard deviation of an array of bet multiples (image 5).



NEMO'S VOYAGE

Nemo's Voyage (Hot Shot Casino Slots) has a 110% RTP, 42% of spins win, and 1 in 42 spins are a free spin mode

- **Mechanics:** The machine has a pressure symbol that increases the meter, which in turn effects the type of wild symbols that show on the reels (image 1). There are expanding wilds (image 2), and free spins (image 3). In free spins, there is an expanded reel set (image 4).
- **110% total RTP:** This very high RTP is likely due to the variability of the machine's free spins. This was taken from 1,000 spins of the machine.
- **42% of spins win:** In the machine, there were very few small wins. By comparison, Nemo's Voyage spins hit half as much as Blazing 7s.
- **1 in 42 spins are bonus wins:** This is a much less frequent hit rate than Blazing 7s.
- **49% bonus game RTP (included in total RTP):** 44% of the total RTP is given out in the bonus game, a very high amount. The bonus game is 10 free spins.
- **93x is max win:** There is a wide range of results for the free spin in Nemo's Voyage. Some free spins win a ton of coins while others win none (image 5).
- **Variability is high with a standard deviation of 5.51 of bet multiples:** This is the standard deviation of an array of bet multiples (image 5).



RAGING RHINO

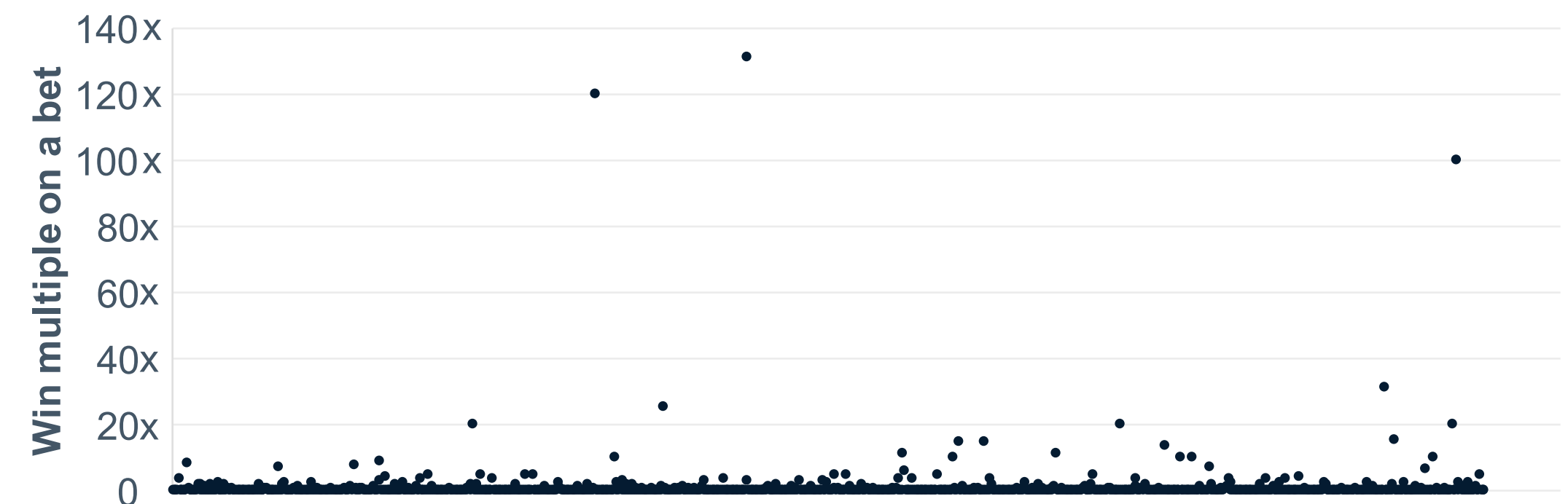
Raging Rhino (Hot Shot Casino Slots) has a 98% RTP, 25% of spins win, and 1 in 32 spins are a free spin mode

- **Mechanics:** The machine zooms in and out with 4,096 paylines (image 1). Rhinos are big winners (image 2). Diamond symbols are scatters (image 3). Free spins that are less than 10x the bet trigger a Bonus Guarantee that gives players a 10x win (image 4).
- **98% total RTP:** A standard RTP for an RMG machine.
- **25% of spins win:** This is the lowest win percentage of the first three machines.
- **1 in 32 spins are bonus wins:** This sits in between Blazing 7s (1 in 21) and Nemo's Voyage (1 in 42).
- **31% bonus game RTP (included in total RTP):** 32% of the total RTP is given out in the bonus game, a moderate amount compared to the other two machines.
- **132x max win:** Big wins are huge in Raging Rhino.
- **Variability is high with a standard deviation of 6.8 of bet multiples:** This is the standard deviation of an array of bet multiples (image 5).



5

Raging Rhino's payouts (multiple of bet)



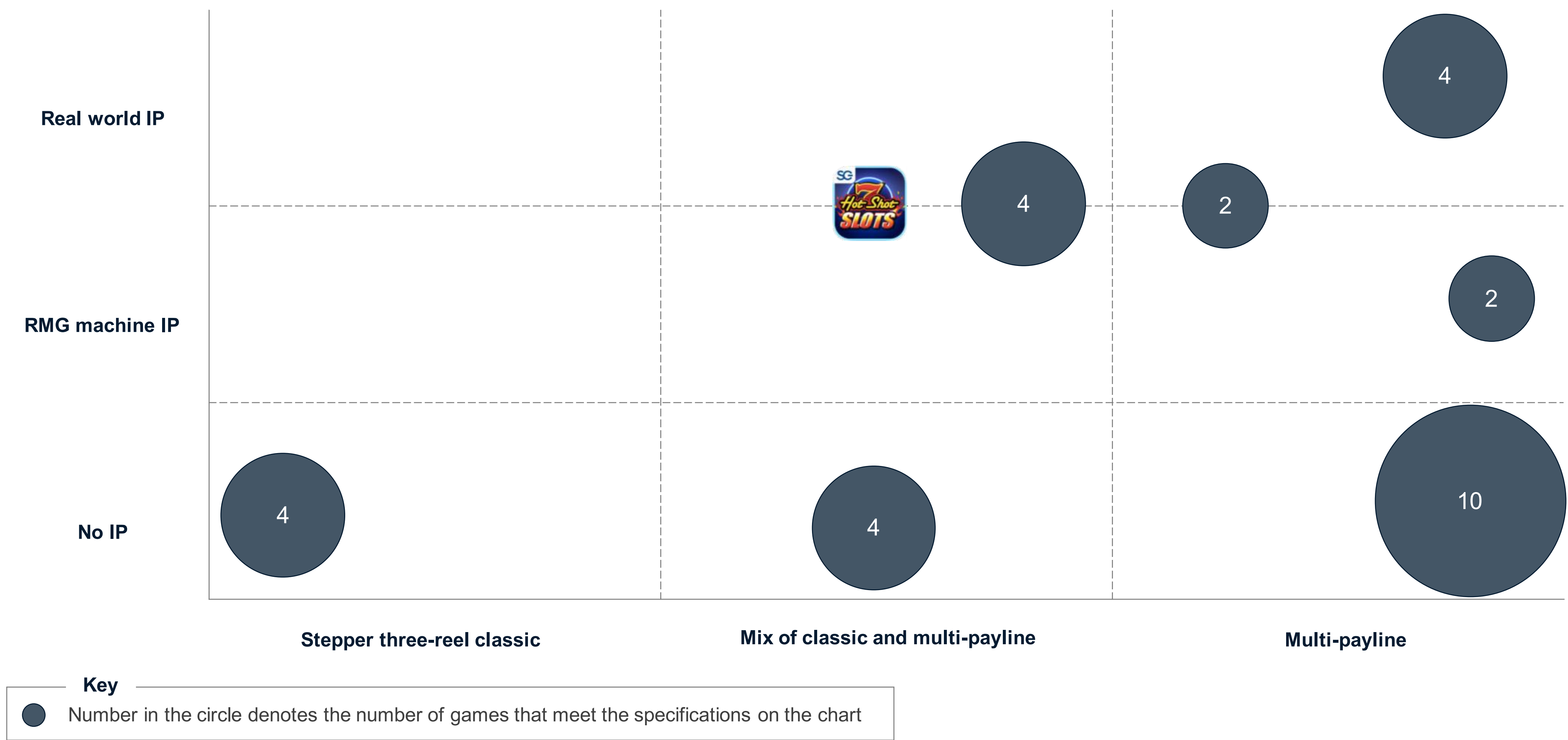
MARKET COMPARISON

Hot Shot Casino Slots is a solid player but often competes directly with other games within Scientific Games' portfolio

	Strength	Hot Shot Casino Slots (HSCS)	Competition Games
IP		The strongest combination of both real world and machine IP in the social casino space	     
Mechanics		HSCS offers a wide range of mechanics, ranging from classic, to multi-payline, to mini-games and is one of the first to seriously offer multiple bonus reel sets (e.g. the KISS machine with two reel sets)	     
Jackpots		HSCS has single and triple progressive jackpots on 12% of the machines and displays the jackpots nicely in the lobby	     
Complexity		The machines are fairly complex, and do not provide a wide array of mini-games within each machine (e.g. bonus games)	     
Access		All variants have quick level progression but depending on the test variant, there are either a few or many machines available to new players	     
Quality		The art, style, and VFX of the machines are quality but some machines are simple rendered pictures, lowering the quality bar slightly	     

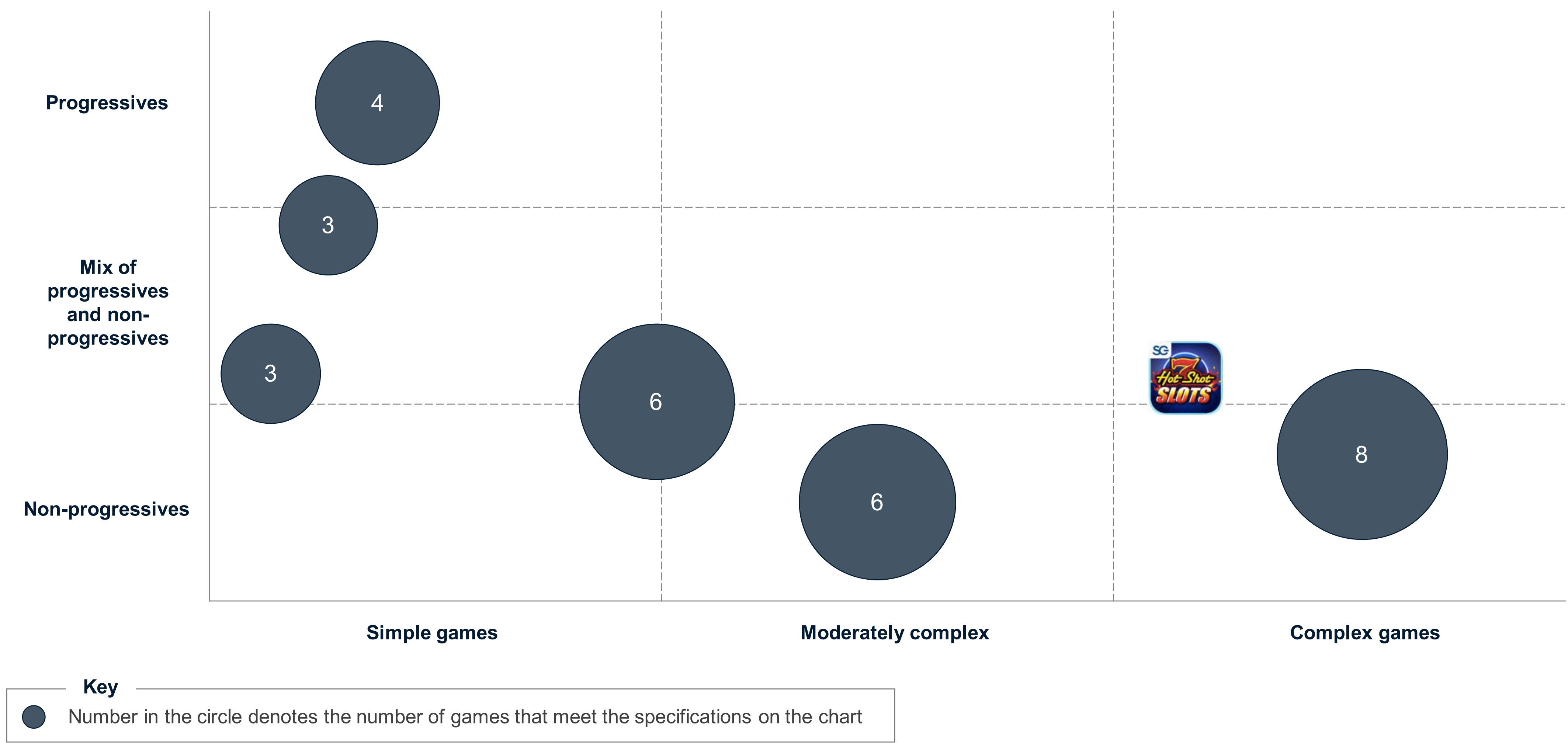
IP USAGE & MACHINE TYPE POSITIONING

Most games offer multi-payline machines with a spectrum of IP uses. There is sizable competition with real world and RMG machine IP. Hot Shot Casino Slots has both real world and RMG IP with a mix of classic and multi-payline machines



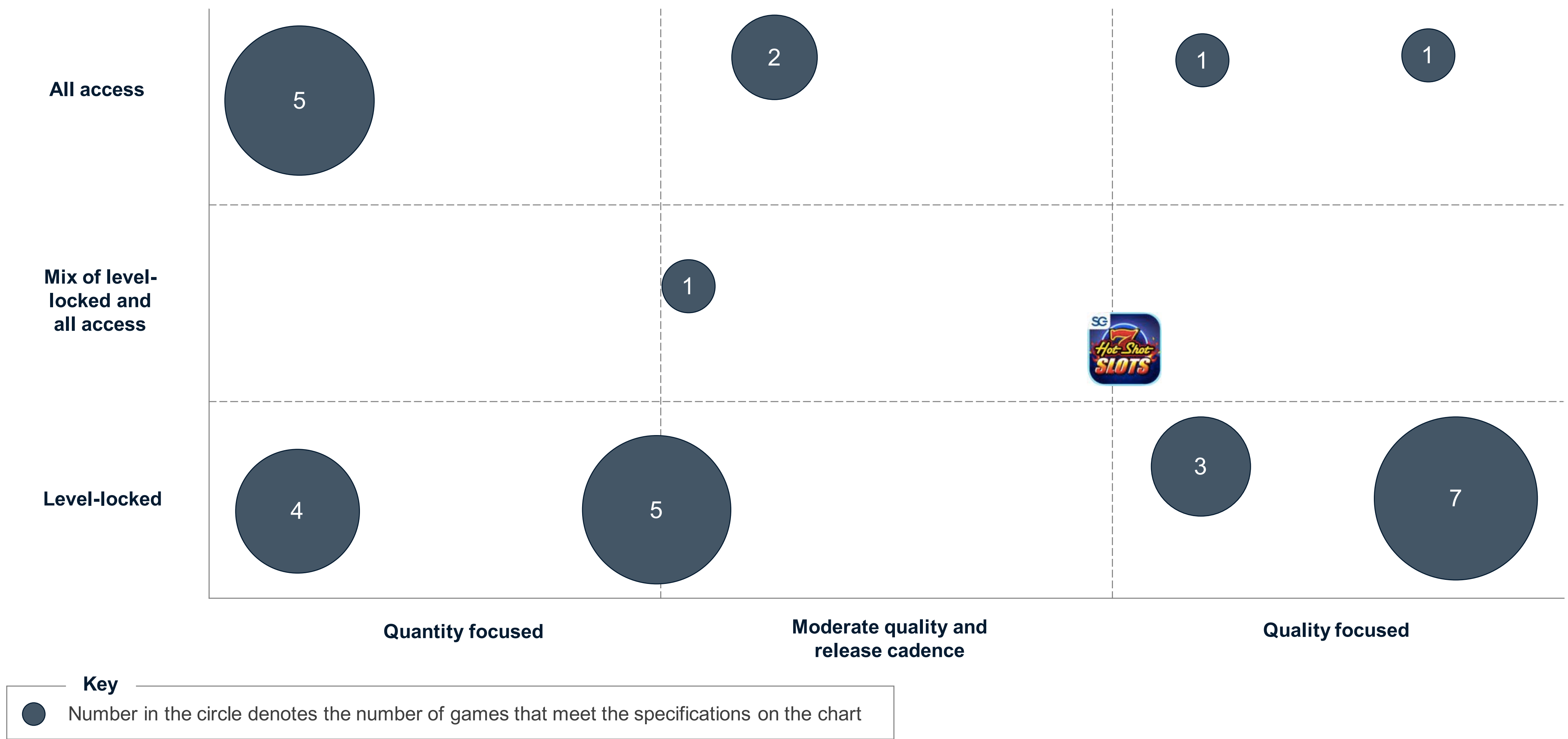
PROGRESSIVES & GAME COMPLEXITY POSITIONING

There are opportunities in games with complex machines and progressive jackpots. Hot Shot Casino Slots has fairly complex machines with progressive jackpots on 12% of machines



GAME ACCESS & QUANTITY vs. QUALITY POSITIONING

More games have level-locked content focused on both quantity and quality of machine releases. Hot Shot Casino Slots' machines are quality with a combination of accessible and level-locked machines



KEY FEATURES AND RECOMMENDATIONS

FEATURE RECOMMENDATIONS SUMMARY

Use different marketing frameworks to diversify your roadmap with incremental and exponential growth features. Launch a few quick wins in the meantime, like scratcher cards, for short-term revenue

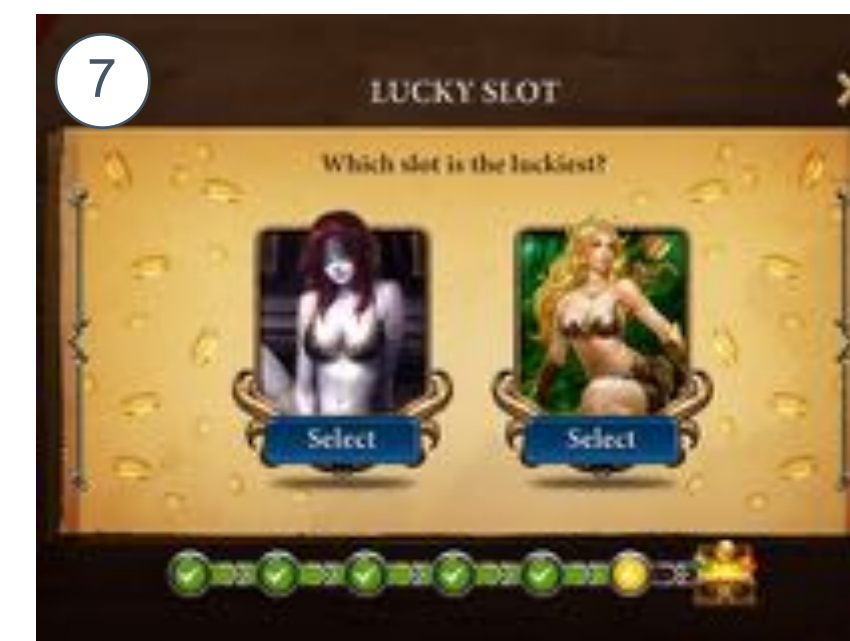
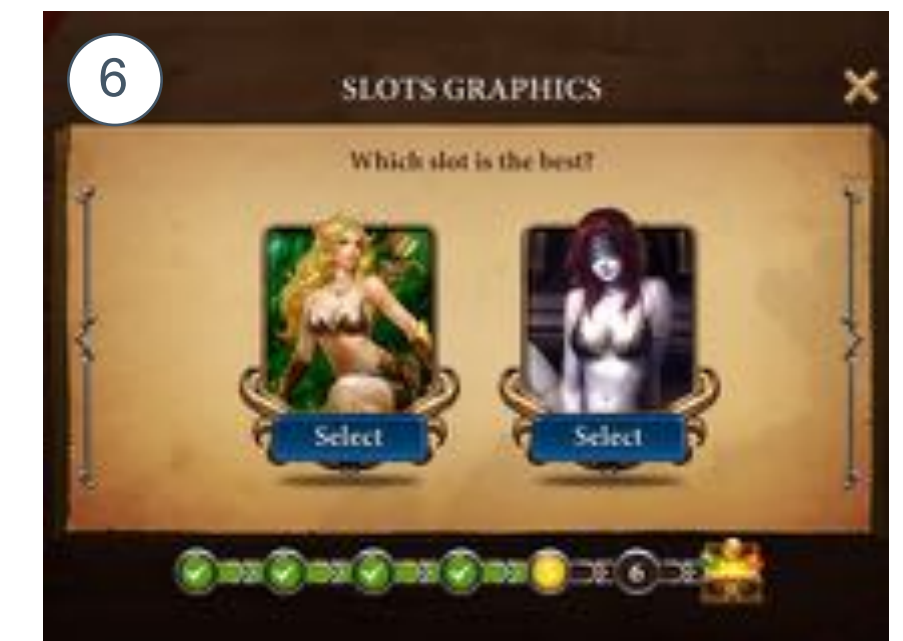
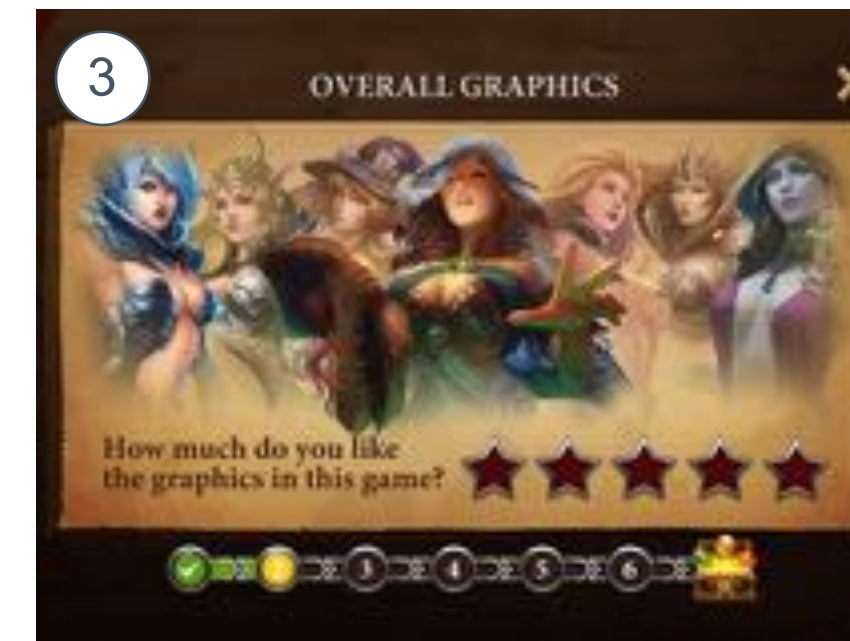
Feature	Impact	Recommendations
In-game surveys	<ul style="list-style-type: none">Exponential growth	<ul style="list-style-type: none">Apply the appropriate market framework based on feature goalsUnderstand players better by using a broad range of research tactics
Quick Wins		
Gamified sales	<ul style="list-style-type: none">Increase revenueNew buyer conversion	<ul style="list-style-type: none">Make players feel like they are lucky to have a big saleMake the results feel random, but when players do not convert, start to increase the likelihood of a high win
Organic Communities	<ul style="list-style-type: none">Increase retention	<ul style="list-style-type: none">Consider initiating a community SupergroupUsers will enjoy a social and entertaining dynamic that feels organic
Scratcher cards	<ul style="list-style-type: none">Short-term revenue bumps	<ul style="list-style-type: none">Consider adding scratchers to your game as a fun way for payers to spend more while gambling on their purchases

IN-GAME SURVEYS

SCATTER SLOTS

Scatter Slots collects tactical and emotions-based information with a thorough in-game survey system

- In the lobby, Scatter Slots adds an opt-in feedback button after level seven (image 1).
- Clicking on the feedback button opens a Scatter Slots-themed survey (image 2). Completing the survey gives players coins, gems, and upgrades worth ~\$10 total.
- The survey asks basic questions, like ‘How much do you like the graphics in this game?’ (image 3) and, ‘How much do you like the variety of slots features?’ These questions have a five-star rating system (image 4).
- The survey also asks intrinsic questions like, ‘Are you feeling lucky?’ with three options of No Luck, Sometimes, and I’m Lucky! (image 5).
- The last two questions ask, ‘Which slot is the best?’ and, ‘Which slot is the luckiest?’ (images 6 & 7).
- At the end of the survey, players are given the ~\$10 reward and asked to rate the game (image 8). Clicking ‘RATE US’ takes players to the app store.
- **No other top 30 grossing social casino iOS game has such a robust in-game survey system.**



STP vs. JTBD FRAMEWORKS

Use Segmentation, Targeting, and Positioning (STP) to take market share from other social casino products. Use the Jobs to Be Done (JTBD) framework to grow market share outside of social casino

Segmentation, Targeting, Positioning (STP)	Jobs to Be Done (JTBD)
<p>Segment the market:</p> <ul style="list-style-type: none">Breakdown the market by: demographics (age, gender, income, education, etc.); geographic (country, region, etc.); psychographics (personality, values, beliefs, etc.); behavioral (how people use products, loyalty, desired benefits).For example, break down the market into different groups: High Rollers, Elders Elites, True Blues, Ice Queens, etc.¹ <p>Target the ideal customer:</p> <ul style="list-style-type: none">Determine the potential opportunity for your product or feature in each segment based on size of market, competition, and your ability to gain market share. Pick the most profitable customer segmentation.For example, pick the Elders Elite, who are 11% of the market, mostly older males, predominately members of loyalty programs, and have relatively high income. <p>Position your product vs. competition:</p> <ul style="list-style-type: none">Provide a better, cheaper, or different benefit to this target customer than other social casino products.For example, provide Elders Elite with better VIP benefits than other social casino games.	<p>Observe current and potential customers:</p> <ul style="list-style-type: none">Watch current customers, study non-customers buying competing products, and find hacks or other solutions.For example, a consultant to a major fast food restaurant spent the day in an actual restaurant observing customers, noticing that 40% of milkshakes were purchased in the morning, that the buyer was always alone, that the milkshake was the only thing they bought, and that they always ordered the milkshake to-go.² <p>Understand jobs that customers need solved:</p> <ul style="list-style-type: none">Find the problems and desires (jobs) that customers need resolved. Every job has a functional, emotional, and social component.For example, most people purchased milkshakes to make their commute more enjoyable and fill them up until lunch. <p>Provide better solutions for the job:</p> <ul style="list-style-type: none">Provide solutions that improve the product or purchasing behavior (e.g. making it easier to purchase, easier to use, etc.).For example, they made the milkshake thicker so that it would last longer during the boring commute, added tiny fruit to make their commute more exciting, and added a self-serve milkshake machine to speed up time-to-purchase.

1. Critical Behaviors and Trends of Casino Customers: A New Segmentation Model For The North American Gaming Industry. Jonathan Barsky. University of San Francisco. 2010.

2. Integrating Around the Job to Be Done. Clayton M. Christensen and Laura Day. Harvard Business Review. May 5, 2016

RMG CUSTOMERS: MARKET SEGMENTATION

RMG (not-slots specific) customers segmented into seven categories based on a study conducted by the University of San Francisco School of Management¹

	%	Visits ²	Demographic info	Favorite brands
High Rollers	4%	28	<ul style="list-style-type: none">Predominately male, high income, high spenders, frequent travelers, non-loyalty members, fairly satisfied with services	<ul style="list-style-type: none">Upscale casinos (Bellagio, Encore, Venetian, and Wynn)
Elder Elites	11%	17.4	<ul style="list-style-type: none">Predominately older males, elite loyalty members, pessimistic about gambling, with high income	<ul style="list-style-type: none">Mid-tier casinos (Harrah's, Caesar's Palace, Trump, Bally's)
Unmoved Members	33%	11.5	<ul style="list-style-type: none">Regular loyalty members, lowest satisfaction but likely to recommend and return, travels for shorter periods of time	<ul style="list-style-type: none">Lower-tier casinos (Tropicana, Orleans, Harrah's)
True Blue	12%	11.4	<ul style="list-style-type: none">Regular loyalty members, highest satisfaction and most likely to recommend and return, pays premium for rooms	<ul style="list-style-type: none">High-end Native American casinos (Foxwoods, Mohegan Sun)
Happy-Go-Lucky	9%	9.1	<ul style="list-style-type: none">Highly satisfied customers but non-loyalty members, optimistic about gambling, likely to recommend and return, young, average income, pays premiums for rooms	<ul style="list-style-type: none">Themed casinos (Hard Rock, New York-New York)
Ice Queens	10%	8.9	<ul style="list-style-type: none">Hard to please and not satisfied with service, non-loyalty members, pessimistic about gambling, unsure about returning or recommending, young, mostly female, average income, relies on reviews for selecting casino	<ul style="list-style-type: none">Destination-themed casinos (Circus Circus, Excalibur, Mandalay Bay, and Imperial Palace)
Accidental Travelers	21%	7.5	<ul style="list-style-type: none">Infrequent travelers, non-loyalty members, fairly optimistic about gambling, satisfied with service, youngest, average income, seldom return	<ul style="list-style-type: none">Classic casinos (Luxor, Excalibur, MGM Grand, Treasure Island, Palms)

1. Critical Behaviors and Trends of Casino Customers: A New Segmentation Model For The North American Gaming Industry. Jonathan Barsky. University of San Francisco. 2010.

2. Visits = nights per year

RMG SLOTS PLAYERS: JOBS TO BE DONE

RMG (slots specific) customer motivations broken down into four categories based on a study conducted by the International Journal of Contemporary Hospitality Management¹

	% ²	Reasons to play	Demographic info	Top reason to pick a slot machine
Excitement	28%	<ul style="list-style-type: none">Excitement	<ul style="list-style-type: none">Predominately female (59%)Largest % under 45 (21%)Lowest % of heavy gamblers (19%)Play less often but have higher income and spend more overall	<ul style="list-style-type: none">“The bet is within my budget”Do not care if the machine is themed57% do not play progressives
Multi-purpose	27%	<ul style="list-style-type: none">ExcitementRelaxationFinancial rewards	<ul style="list-style-type: none">Highest % of heavy gamblers (24%)Predominately male (55%)Lowest household income	<ul style="list-style-type: none">“It’s a fun game to play”“There is a good chance to win”“The bet is within my budget”Do not care if machine is themed61% do not play progressives
Relaxation	25%	<ul style="list-style-type: none">Relaxation	<ul style="list-style-type: none">93% marriage rateMost college graduatesSecond highest % of members (22%) who play \$1 bets	<ul style="list-style-type: none">”It’s a fun game to play”“It has a denomination that I want to play”
Utilitarian	20%	<ul style="list-style-type: none">Kill timeSocialize with friends	<ul style="list-style-type: none">Oldest group (61% over 54 years old)Highest household incomeHighest % of light gamblers (18%)Lowest confidence scores on all factors (players might be motivated by other factors as well)	<ul style="list-style-type: none">“It (the machine) has the denomination that I want to play”Prefers \$0.25 machines (3rd lowest bet amount)Do not care if the machine is progressive or has a theme

1. Segmenting slot machine players: a factor-cluster analysis. International Journal of Contemporary Hospitality Management. Sandy C Chen. January, 2013.
2. The results were from 1,018 players who responded, “the most frequent game played is slots” during an online survey. The survey was marketed in *Strictly Slots* magazine.

RECOMMENDATIONS

Apply the appropriate market framework based on feature goals. Understand players better by using a broad range of research tactics

- **Use STP framework for incremental growth features:** The STP framework works well when building a new machine, a leaderboard, tournaments, etc.
- **Use JTBD framework for exponential growth features:** As outlined previously, JTBD framework focuses on core motivations that expands the competition to other entertainment, relaxation, and time-killing apps.
- **Expand your market research capabilities:** A/B testing is great but currently universal among game creators. Utilize field studies, focus groups and interviews to gain a competitive advantage.
- **Ask the right questions:** “What purpose does our game solve?” for functional information; “What emotion does our game satisfy?” for emotional information; and “What prompted you to do something different, instead of playing our game, when you were in the same situation and had the same desires? What did you do instead?” for information on out-of-market competition.
- **Watch and interact with current and potential customers:** To truly understand player’s desires, go into the field and watch them in their natural surroundings. Consider interviewing them on the spot.

Understanding desires

Interviews: Interview players, ideally in their natural surroundings

Field study: Watch players in their natural surroundings playing your game

Focus groups: Consider using card sorting during a focus group

Customer feedback: Open ended customer feedback or use of current customer feedback through customer service channels

Surveys: Ask players specific questions either during play (in-game surveys) or outside of play (via email)

Link-tests: In-game test that allows players to vote up, down, or X-out a set of expressions

Remote usability studies: Use an in-game tool, like Appsee to watch player behaviors

Ghetto testing: Release part of a feature to see the actions of players during certain steps in the funnel

A/B testing: One of the most common methods used in gaming to determine, among other things, if a test is positive

Understanding actions

QUICK WINS

- Gamified Sales
- Organic Communities
- Scratcher Cards

GAMIFIED SALES

GSN Casino released a gamified sale bonus: a 1000% chip bonus is awarded to players in a pick'em style game

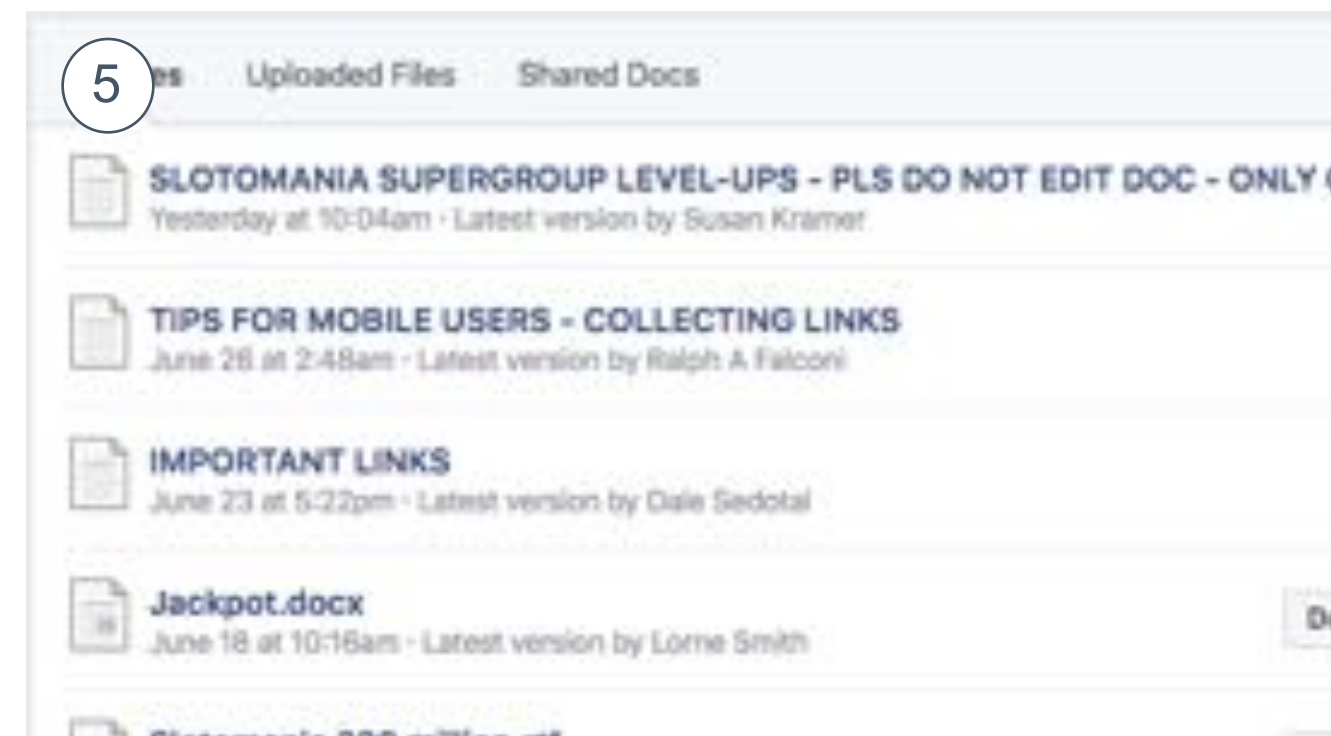
- **Make players feel like they are lucky to have a big sale.** Upon entering GSN Casino, players are asked to play a simple pick'em game to determine the sale percentage (1000%, 500%, or 200%) (image 1).
- **Make the results feel random, but when players do not convert, start to increase the likelihood of a high win.** In GSN, players always win the 1000% bonus (image 2). To give the mechanic more longevity, make the game feel variable. But, when players have not converted, start to increase the likelihood of a high win.
- **Add a short three-minute countdown timer.** Wizard of Oz's 4th of July Sale counts down from three minutes upon app-load. With a three-minute timer, players can play the pick'em style sale multiple times in one session (image 3).
- **Consider adding multiple steps to make the game seem even more lucky.**
- The sale is also referenced on the buy page (image 4) when players click 'Save Now' on the pick'em game (image 2).



ORGANIC COMMUNITIES

Consider initiating a community Supergroup. Users will enjoy a social and entertaining dynamic that feels organic

- Slotomania's Supergroup Revamped (SSR) is a closed group, meaning players must request to join. The group has 357K members, three admins, and 26 moderators. This gives the community a really organic feel. Personal relationships, even arguments, are discussed in moderators' posts. This provides not only a social experience but also entertainment (image 1).
- There is an annual SSR party and a countdown timer to when the party begins (image 2). This virtual party was attended by 14K people last year.
- Polls are used to help people add friends. 11K people checked, 'Add me for coins.' Only 800 checked 'I have enough friends' (image 3).
- The group is also used to answer support tickets that have gone unanswered (image 4).
- Players often post big wins and big losses (image 5).
- The group shares documents explaining features such as, level ups, mobile play, important links, guidelines for groups, etc. (image 6).
- Polls are used to feature improvements (image 7). Players can add options to the poll. The top-requested features are listed in image 7.
- Polls are also used to rank and collect the most prevalent bugs (image 8).



SCRATCHER CARDS

Wizard of Oz continues to release easy-to-implement yet high ROI scratcher cards

- Scratcher cards are marketed in the lobby in the bottom left corner above the gold BUY button (image 1).
- The Emerald City Scratchers hold six scratcher cards. The prices of each card ranges from \$1.99 to \$99.99 (image 2). Players are given one free scratcher card.
- The scratcher card Poppy Fields is a pretty simple Match 3 scratcher card (image 3). Players can either scratch each gem separately or press 'Scratch All.'
- There is a winning animation screen after the scratching is completed and a player has won coins (image 4).
- A \$9.99 Tic-Tac-Toto scratcher purchase yielded three cards, 3.4M, 4.25M, and 42.5M; a total value of ~\$20 if purchased on the buy page (image 5).
- A limited time \$99.99 offer with a two-minute countdown timer triggers after completing the third scratcher card (image 6).
- **Consider adding scratchers to your game as a fun way for payers to spend more while gambling on their purchases.**



MARKET WATCH AS OF 7/19/16

TOP 10 GROSSING

GSN released a gamified sale. Jackpot Party Casino released a quest system with a machine release. Hit it Rich! released a reprice

Game	Strength	Date	Notes
Big Fish Casino	●	7/6/16	New machine released
DoubleDown Casino	●	7/5/16	New machine released
GSN Casino	●	6/30/16	New machine, updates to Video Bingo, and gamified sales on 6/30 (image 1). New machine released on 7/13
Slotomania Casino	●	7/11/16	Extra Slot Cards with higher rarity released in coin store, and 4 th of July sales on 6/22. Farm Fortune 2, a new machine, is coming soon
House of Fun	●	6/29/16	Two new machines and the ability to check the Inbox within the machines
Heart of Vegas	●	6/6/16	No new release
Jackpot Party Casino	●	7/14/16	Smooth Criminal, a Michael Jackson-themed machine, was released with a quests system (image 2)
Hit it Rich!	●	7/5/16	New machine released on 6/27. Economy reprice released on 7/5, increasing daily bonus, jackpots, purchase, etc. (image 3)
Wizard of Oz	●	5/23/16	A Vault feature (similar to the piggy bank feature in Slotomania) was released but reverted quickly due to implementation
Bingo Bash	●	6/22/16	New room added



TOP 11 – 20 GROSSING

Gold Fish Casino Slots released a challenge system. DoubleU Casino added benefits to their VIP program. Caesars Slots marketed their non-FB web game

Game	Strength	Date	Notes
Quick Hit Slots	●	7/19/16	New machines released 7/5 and 7/19
BINGO Blitz	●	6/21/16	New room and new machine
Gold Fish Casino Slots	●	6/24/16	Added a Battleship Challenge system on 6/24 (image 1). Added Zendesk support on 7/5
KONAMI Slots	●	6/21/16	Two new machines and additional content on existing games
DoubleU Casino	●	7/17/16	New machine and higher bets for VIP players on 6/2 (image 2). New classic machine released on 7/17
World Series of Poker	●	11/23/15	Add betting control, new events, new design, and bug improvements (last release 11/23/15)
Viva Slots Las Vegas	●	7/5/16	New machines released 6/25 and 7/5
Scatter Slots	●	7/14/16	New machine and bug fixes released on 7/2 and 7/14
Caesars Slots	●	7/18/16	New machines released in both 7/4 and 7/11 releases. Caesars marketed a new version of their non-FB web game 7/18 (image 3)
Pharaoh's Way	●	6/20/16	New machine



TOP 21 – 30 GROSSING

Slot Bonanza and Black Diamond both released a new lobby. Jackpotjoy Slots released Plus+, a new boost feature added to purchases

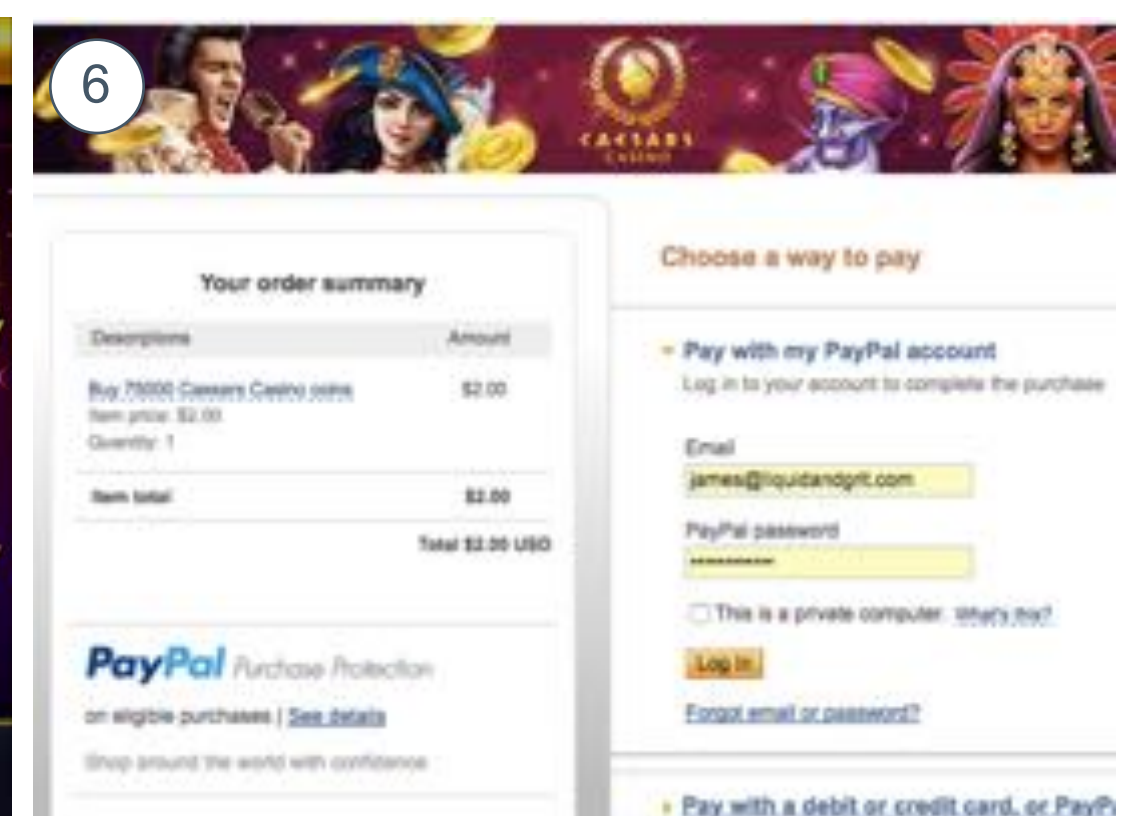
Game	Strength	Date	Notes
myVegas	●	6/27/16	Two new machines and multi-game jackpots
Slot Bonanza	●	7/11/16	New lobby and three new machines (image 1)
Free Slots!- Black Diamond	●	6/17/16	Two new machines, new lobby, and quicker transitions (image 2)
GSN Grand Casino	●	6/6/16	No new release
DoubleUp Slots	●	5/17/16	No new release
High 5 Casino	●	7/1/16	New in-game one-click share added
Hot Vegas Slots	●	6/20/16	No new release
Jackpotjoy Slots	●	7/18/16	Plus+ released on 7/18, a new boost feature added to coin purchases (image 3)
Slots - Classic Vegas Casino	●	5/26/16	No new release
Willy Wonka Slots	●	6/29/16	New room released



CAESARSGAMES.COM

Upon app-entry, Caesars is pushing players from mobile to their non-FB web platform at www.caesarsgames.com

- Players receive an app-entry marketing dialogue introducing a new edition of www.caesarsgames.com, a non-Facebook web version of Caesars Casino (image 1).
- Players can use Facebook to play and connect to www.caesarsgames.com but the game is off platform and not paying 30% to Facebook (image 2).
- The same live-ops events are happening on mobile and web (image 3).
- The game has all the features as the mobile platform (image 4).
- Coin prices are the same on both platforms (image 5).
- Payments are processed through Paypal (image 6).
- **Explore this new channel with a test ad campaign to understand the customer acquisition costs. Watch out for fraud and consider only launching in major GEOs.**



NEW BET CONTROLS

WSOP's first official release since 11/23/15 includes new bet controls, new live events, and a refreshed design

- WSOP added a daily return bonus with a mystery reward on day six (image 1).
- The bet controls were improved, adding enhancements to the bet bar (images 2 & 3).
- New events, like Double Status Points, were added to the game with a countdown timer (image 4).
- Clicking 'Get Points' takes players to the buy page where the number of points are displayed next to each coin package (image 5).
- There are no significant changes to the board UI (image 6).



BATTLESHIP CHALLENGE

Gold Fish HD released a level progression mini-game similar to Scatter Slots' goal-based progression system

- There is a 30-day countdown timer (image 1).
- Players must progress along a map with challenges on it attempting to sink ships. Challenges include spinning 100 times. The game was built with permission from the toy company, Hasbro (image 2).
- Players can see their progress in the slot machine at the bottom of the screen in the betting UI (image 3).
- **This type of goal-based mechanic is very similar to the goal-based level unlocking system in Scatter Slots. See our January 2016 Social Casino Report for details on Scatter Slots.**
- Completing the 1st mission results in \$0.18 worth of coins (image 4).
- There is a Battleship-specific slot machine with multiple Mega Jackpots (image 5).
- Players can advance in the Battleship Challenge either in the Battleship-specific slot machine or in another machine in the game (image 6).



ECONOMY DEEP DIVE: HOT SHOT CASINO SLOTS

HOT SHOT CASINO SLOTS

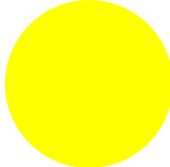
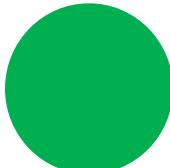
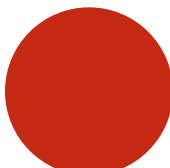
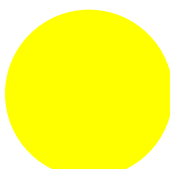
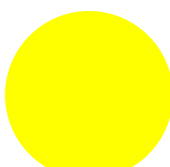
Released April 2016 by Phantom EFX (Scientific Games) with a large initial coin balance but otherwise a relatively average economy

- **RMG and real world IP driven machines:** All the machines are either RMG IP, like Blazing 777s (image 1), or real world IP, like KISS (image 2).
- **Testing content unlocked vs. content level-locked for new players:** For some new players, there are only seven machines unlocked—a few classic machines, like 7 Hot Shots, and a few progressive jackpot machines, like Rainforest Dream (image 3). For other new players, there are 18 machines unlocked—the seven mentioned above plus some strong RMG and real world IP machines, including Cheers, Dean Martin's Party, Alice & The Enchanted Mirror, 88 Fortunes, and Zeus III (image 4).
- **Wide variety of slot machines:** The game offers classic machines, like Blazing 777s; progressive jackpots, like in Margaritaville; and complex reel mechanics, like Van Helsing (image 5).
- **Casino integration:** It appears that Phantom EFX is planning to add Three Card Poker, Texas Hold'em, and other casino games (image 6).



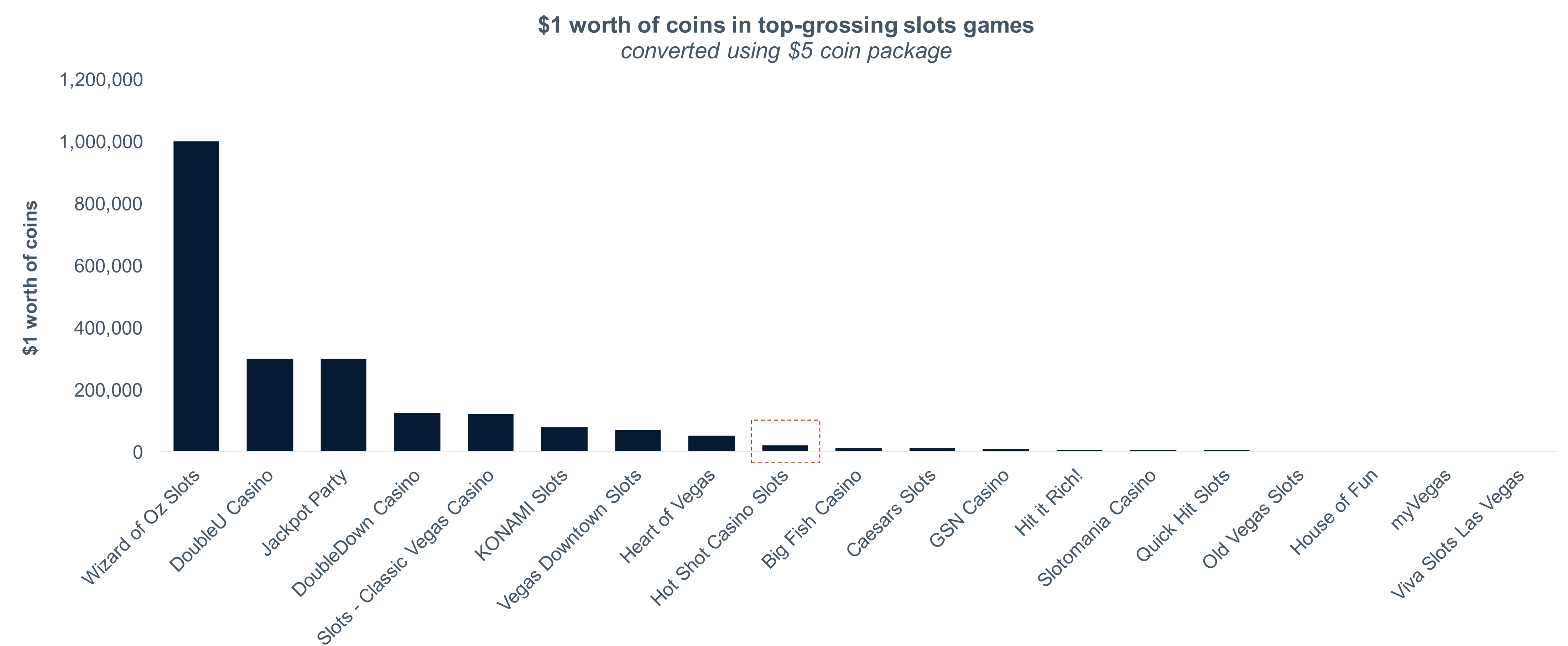
ECONOMY SUMMARY

Hot Shot Casino Slots gives players the second largest initial coin balance, but takes coins away with the most expensive default bet

	Value	Tightness	Notes
Coins-to-dollar ratio	20.4K		<ul style="list-style-type: none">The economy inflation is average compared to top-grossing games
Initial coin balance	\$14.71		<ul style="list-style-type: none">The initial value players receive is the second largest
New user bet values	\$0.29 default \$0.05 minimum		<ul style="list-style-type: none">The initial default bet is the most expensiveThe minimum bet is average
New user tuning	38 default bet spins 300 minimum bet spins		<ul style="list-style-type: none">Players receive an average number of spins at the default bet levelPlayers receive an average number of spins at the minimum bet level
Total daily coin bonuses	\$1.07 primary \$0.98 secondary \$2.05 total		<ul style="list-style-type: none">Players collect an average number of coins daily compared to top-grossing slots games in the primary, secondary, and total coin bonuses

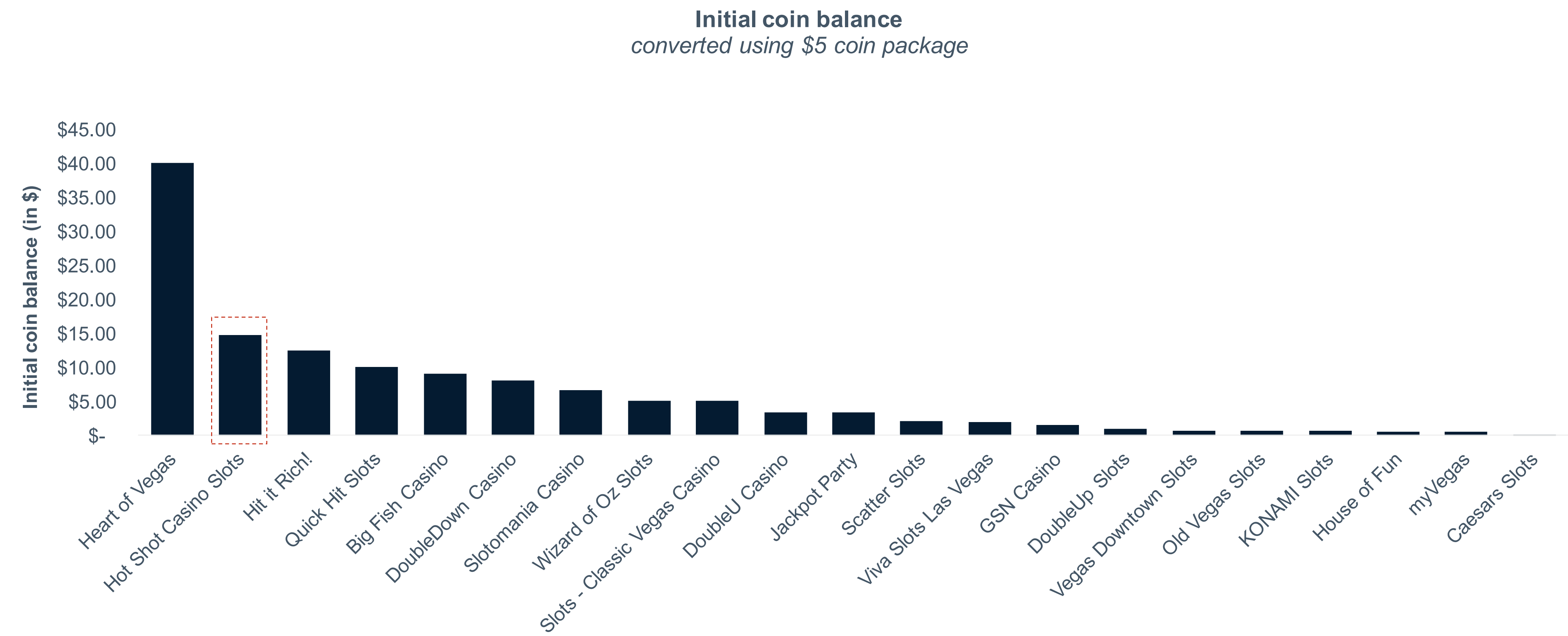
COINS-TO-DOLLAR RATIO

Hot Shot Casino Slots' economy is average coins-to-dollar conversion compared to top-grossing games



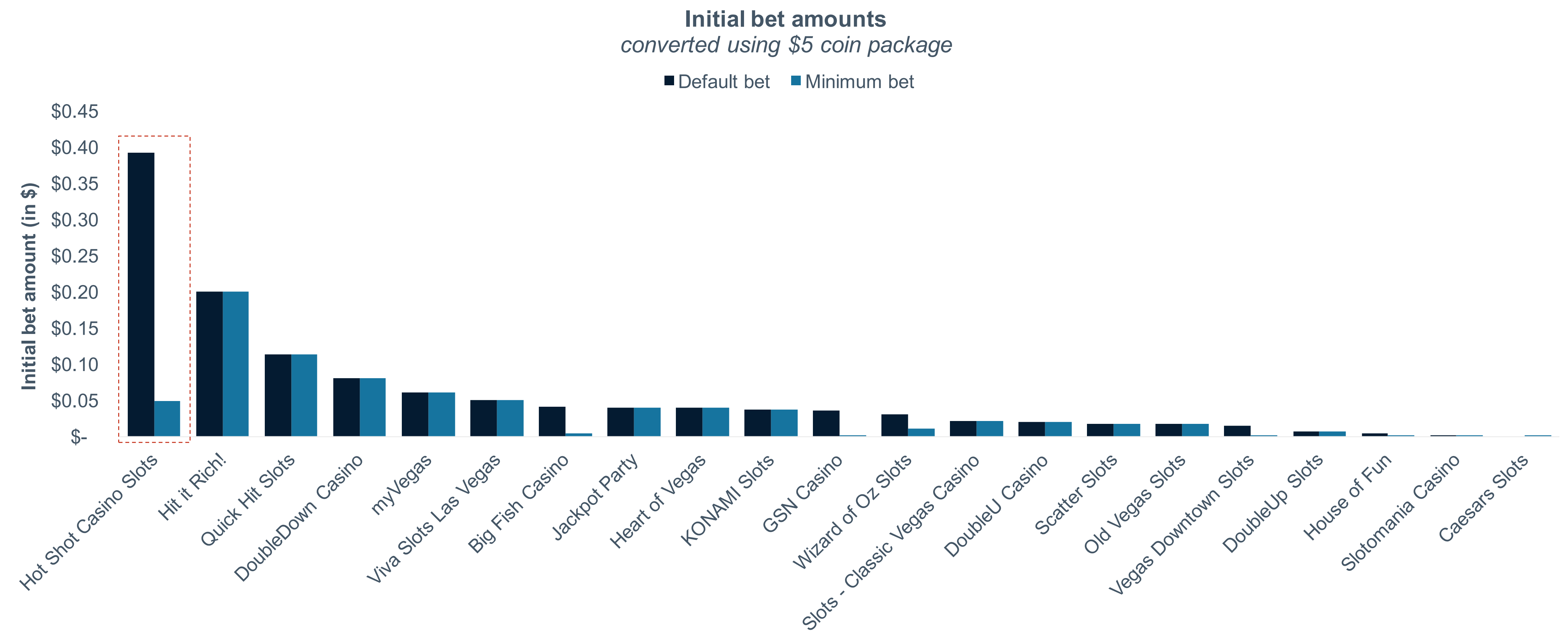
INITIAL COIN BALANCE

Hot Shot Casino Slots has the 2nd largest initial coin balance worth \$14.71



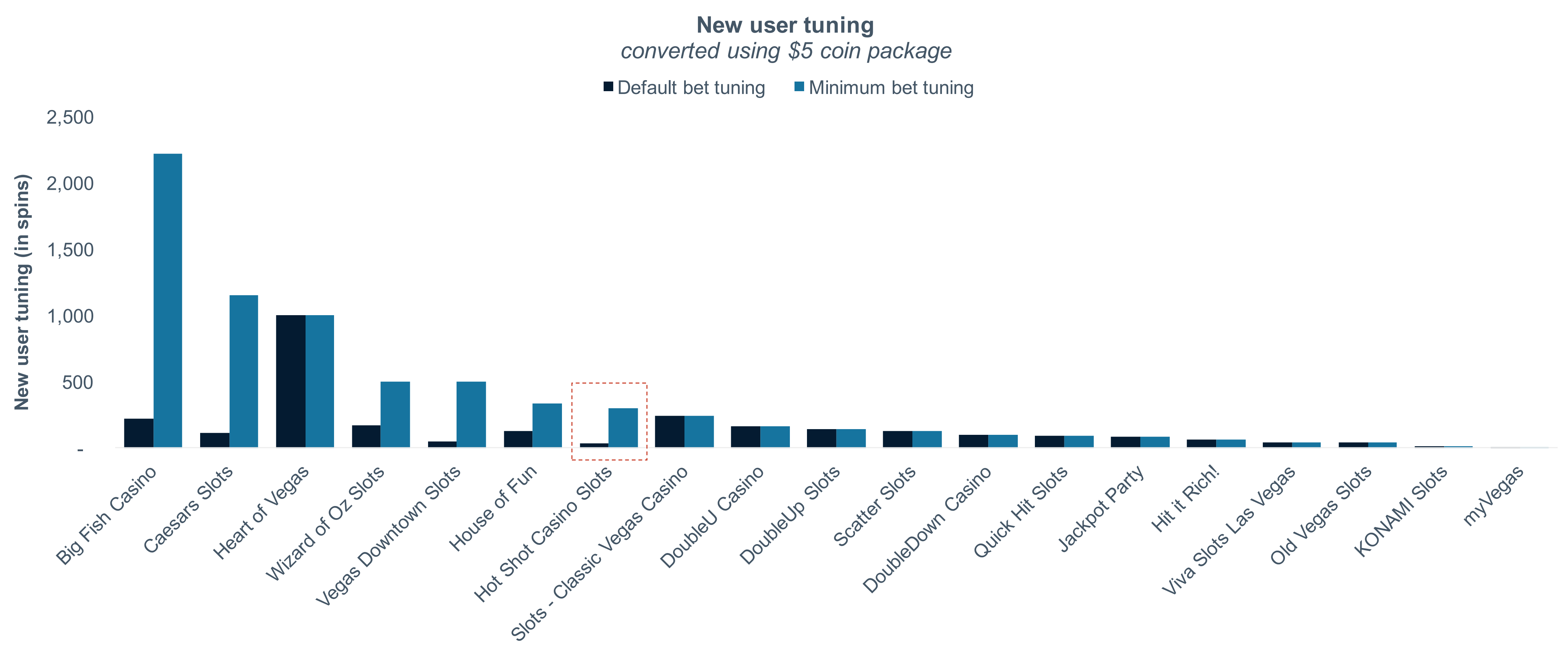
NEW USER MINIMUM AND DEFAULT BET

Players start with a huge initial coin balance. However, the game is tuned very tightly for the default bet at 38 spins and very loosely for the minimum bet at 300 spins



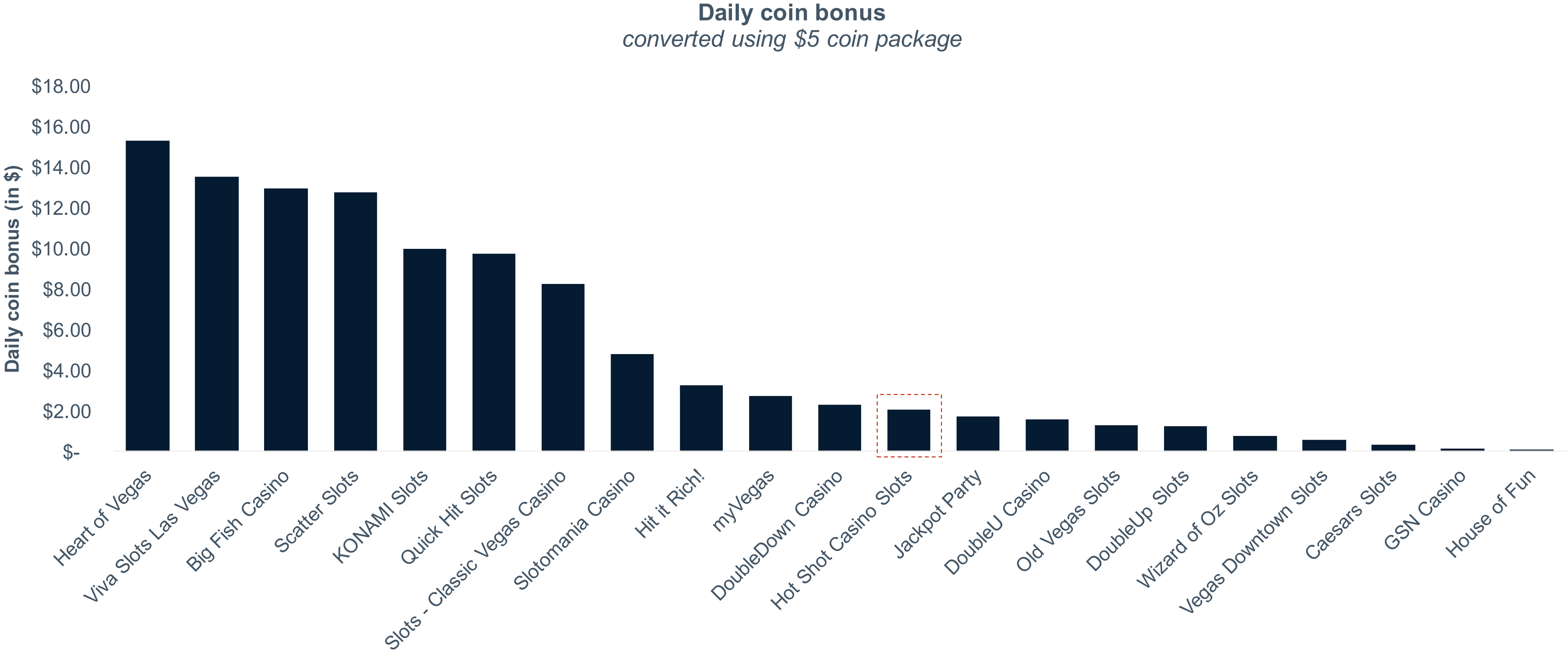
NEW USER TUNING

Players start with a huge initial coin balance but the game is tuned very tightly for the default bet at 38 spins and very loosely for the minimum bet at 300 spins



TOTAL VALUE OF COIN BONUSES

Hot Shot Casino Slots provides an average amount of free coin value daily. The primary bonus is a wheel with a return and friend bonus. The secondary coin bonus is a simple button in the lobby



APPENDIX

DATA COLLECTION PROCESS



Data is collected from market research, app intelligence tools, and a deep analysis of the game

Market research

- Transaction information comes from the iOS App Store's In-App Purchases tab. These packages are ranked based on number of transactions
- Las Vegas player insights come from online sources like the Las Vegas Convention and Visitors Authority and the UNLV Center for Gaming Research
- Progressive jackpot information comes from online research, specifically from Wizardofodds.com
- Trending revenue, downloads, and package-rank data comes from Priori Data, a Liquid and Grit partner

Analysis of competing hypotheses

- *"Analysis of competing hypotheses (ACH) requires an analyst to explicitly identify all the reasonable alternatives and have them compete against each other for the analyst's favor, rather than evaluating their plausibility one at a time."* – CIA.gov
- All the components of a game (e.g., features, economy, theme) compete against each other to determine the most impactful features
- We illustrate how these components compete against each other to determine the most valuable features
- We also incorporate the uniqueness of a feature in the market, comparing the feature across both top-grossing and 2015 breakout slots games on iOS

Game information

- Game information comes from a deep-dive analysis of each game
- Return-to-player (RTP) and win percentage is found by tracking over 500 spins from a machine at a certain bet amount
- In the economy section and economy-related slides, the coin value is determined by converting coins into money using \$5.00 worth of non-sale purchasable coins in each game. For example, if the minimum bet is 1,000 coins and players can purchase 500 coins for \$5.00, the value of the minimum bet is \$10.00. For games without a \$5.00 package, the next closest package is used

Attack him where he is unprepared, appear where you are not expected

– Sun Tzu, *The Art of War*

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