



# LIQUID AND GRIT

## Social Casino Product Report

Competitive research and actionable product recommendations

# TABLE OF CONTENTS

<b>NEW INNOVATIONS</b>	<b>4</b>
Retention Bonus	
Game Center	
Retention Story	
Retention Polish	
<b>LIVE OPS</b>	<b>10</b>
Top Monthly Event Recommendations	
<b>MARKET WATCH</b>	<b>12</b>
Notable Features	
DoubleU Casino – Jackpot Blast Wheel Party	
Hit it Rich – Profiles	
Bingo Blitz – Gift Center	
Jackpot Party – Jackpot Party Bingo	
Hot Shot Casino – Rewards Club	
<b>ECONOMY TEARDOWN</b>	<b>21</b>
88 Fortunes Slots	
<b>APPENDIX</b>	<b>29</b>
Data Collection Process	

APRIL

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# INTRODUCTION



*Reality is wrong. Dreams are for real.*

– Tupac Shakur

Social casino is a multi-billion dollar market that sells virtual currency to millions of people around the world. Thirty years ago, no one would have believed this was possible. The next big developments in social casino may likewise feel unimaginable.

## **New Innovations**

Jackpot Party built their own version of Clash Royale’s chest system. Caesars Slots invested heavily in their *Game Center*, allowing players to more easily send and request gifts. This makes sense given UA costs. Scatter Slots continued to invest in mid-core inspired mechanics, adding storylines to their holiday advent calendar. FaFaFa Real Casino Slots released one of the first subscription packages in the space. This *Monthly Pass* is a VIP-for-a-month feature that automatically renews for \$4.99.

## **Market Watch**

The latest feature trends are centers and profiles: Caesars Slots (*Game Center*), Bingo Blitz (*Gift Center*), and Hit it Rich (*Profiles*). Scientific Games’ portfolio of games released several features: a bingo mini-game and retention bonus in Jackpot Party, and a rewards program in Hot Shot Casino.

## **Economy Teardown**

Phantom EFX’s newest game, 88 Fortunes Slots, is a progression-based game with level-locked machines. The economy is tightly tuned, relying heavily on machine content quality.

Invest in a few dreams.

Brett Nowak

*Editor-in-Chief*

# NEW INNOVATIONS

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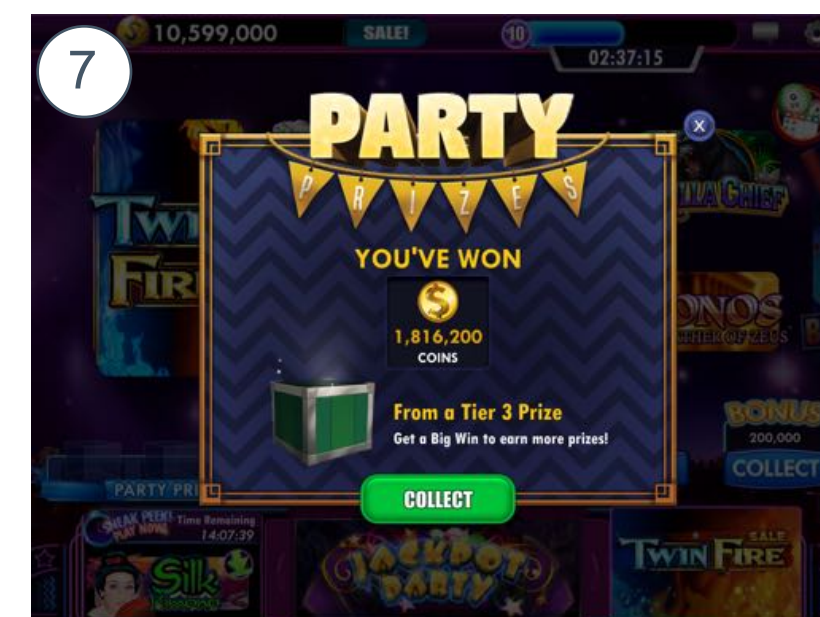
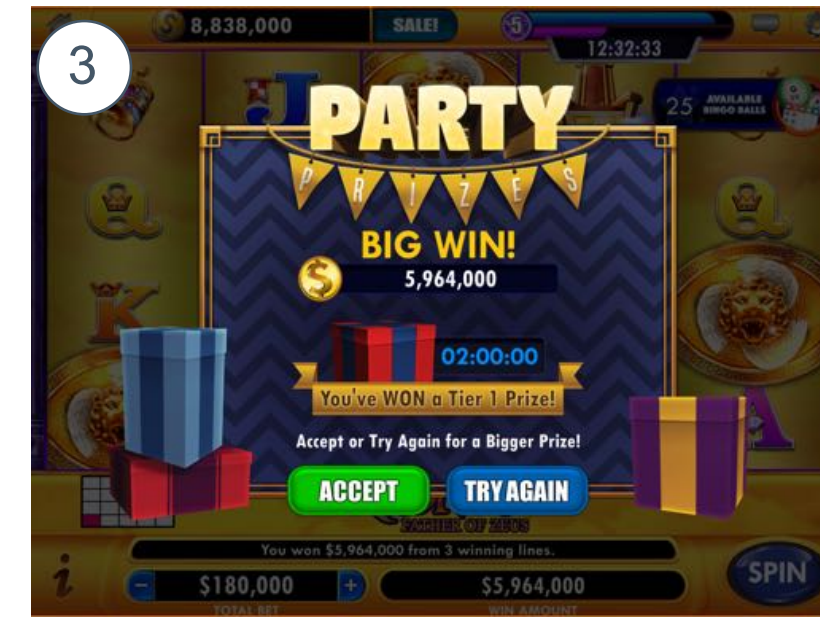
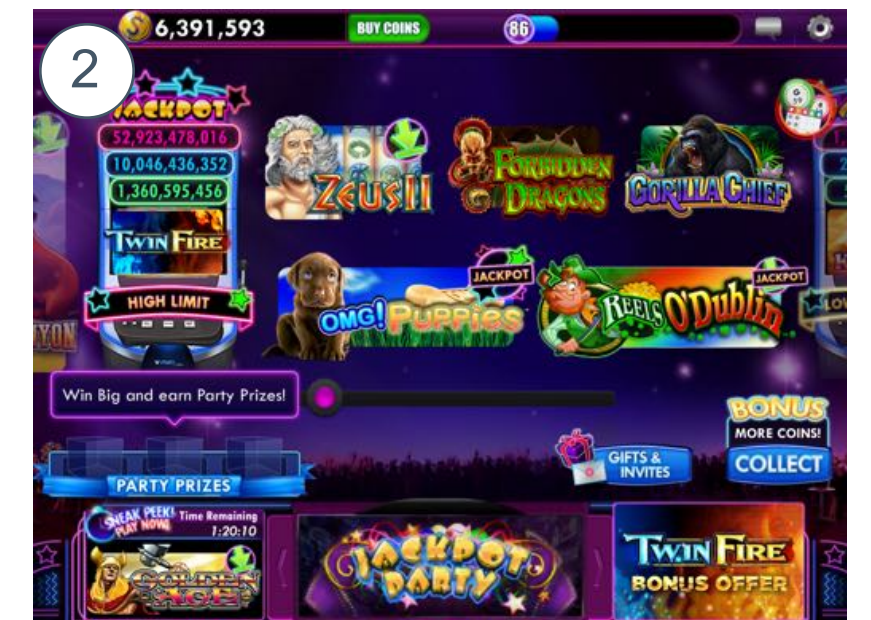
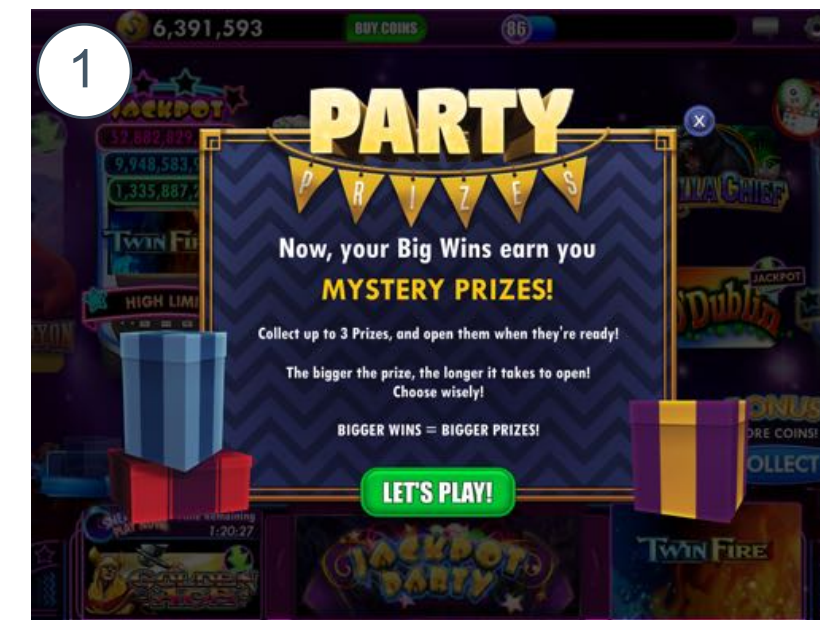
Feature	KPIs	Recommendations
Retention Bonus	<ul style="list-style-type: none"><li>Improve retention</li></ul>	<ul style="list-style-type: none"><li>Construct more elaborate daily bonus systems. Jackpot Party’s <i>Party Prizes</i> gives players time-based options to keep prizes or continue collecting</li></ul>
Game Center	<ul style="list-style-type: none"><li>Drive viral DAU and installs</li></ul>	<ul style="list-style-type: none"><li>Boost sharing systems. Caesars Slots introduces an inbox with in-game friends and gifting, leaderboards, challenges to earn badges, and <i>Legacy Medals</i></li></ul>
Retention Story	<ul style="list-style-type: none"><li>Improve retention</li></ul>	<ul style="list-style-type: none"><li>Captivate players with more story-based elements. Scatter Slots’ <i>Easter Countdown</i> gifts players daily baskets and new storyline pages</li></ul>
Retention Polish	<ul style="list-style-type: none"><li>Create recurring revenue</li><li>Increase whale retention</li></ul>	<ul style="list-style-type: none"><li>Test subscriptions with a VIP-for-a-month mechanic. Upsell all purchases. Release select features to only high-level players</li></ul>



# RETENTION BONUS

Construct more elaborate daily bonus systems. Jackpot Party's *Party Prizes* gives players time-based options to keep prizes or continue collecting

- *Party Prizes* are introduced at app-entry (image 1).
- Players may collect up to three prizes at a time (image 2).
- Hitting a big win during slots play opens a dialogue that displays the big win amount, a *Party Prize* with a timer, and options to 'Accept' or 'Try Again' (image 3).
- Clicking 'Accept' places the prize in an open space in the *Party Prizes* section with a countdown timer (image 4).
- There are three different prize tiers with two, four, and eight hour timers (image 5).
- When a prize timer runs out, a notice appears in the lobby showing that the prize is ready (image 6).
- Clicking on a prize opens a dialogue that displays the amount won, prize tier level, and a 'Collect' button. This tier three prize was worth \$1.52 in coins (image 7).
- Once a prize has been collected, the space becomes available to accept another prize (image 8).

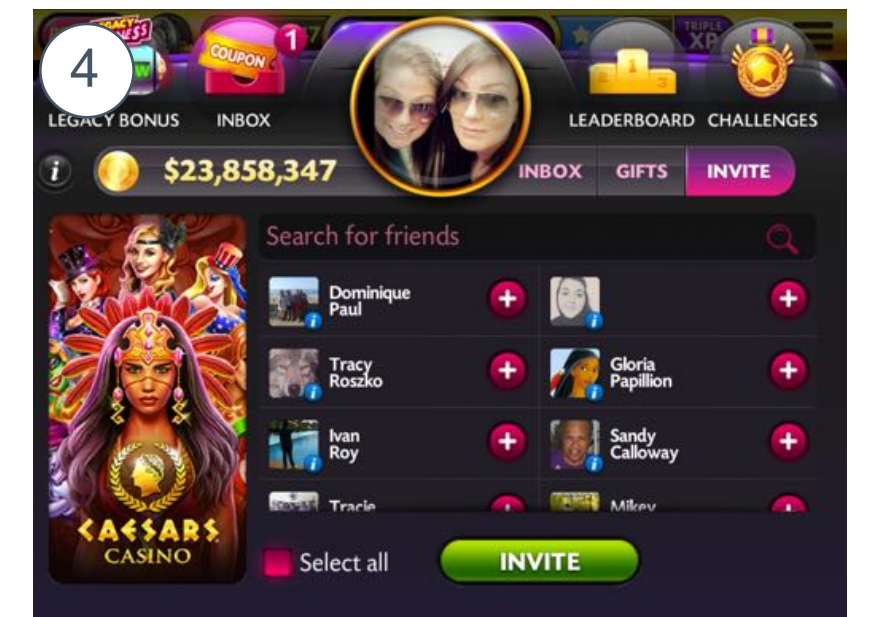
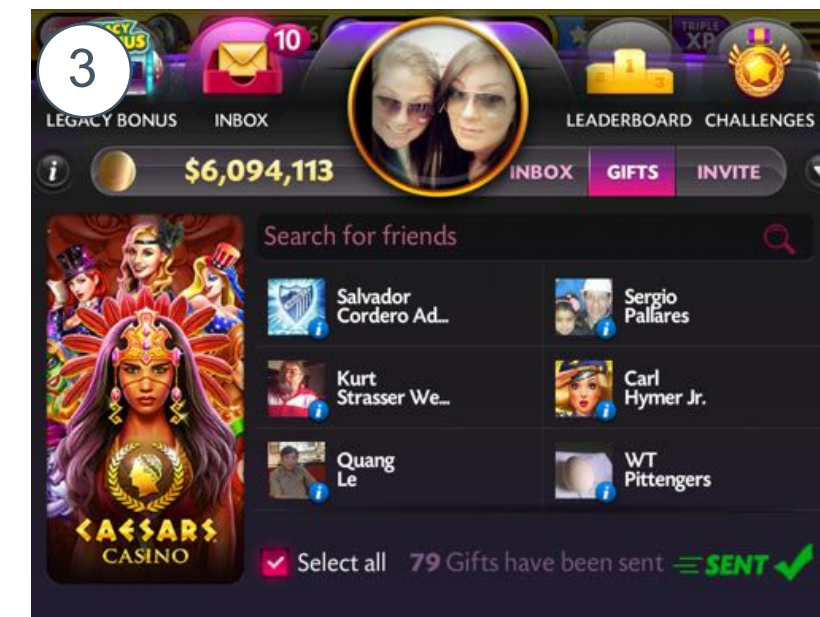
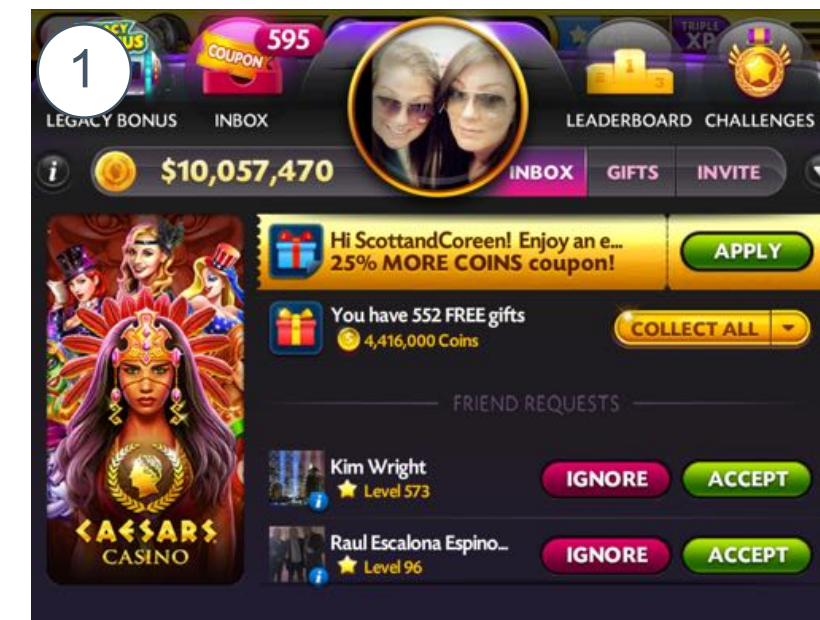




# GAME CENTER

Boost sharing systems. Caesars Slots introduces an inbox with in-game friends and gifting, leaderboards, challenges to earn badges, and *Legacy Medals*

- The inbox offers in-game friend requests, and the ability to collect coupons and gifts from friends with a 'Collect All' button (image 1).
- Once 'Collect All' has been selected, a dialogue appears displaying the number of gifts collected, the total amount of coins, and a 'Gift Back' button (image 2).
- Players may send gifts to all of their friends (image 3).
- The 'Invite' tab allows players to add friends through search, select, or 'Select All' options (image 4).
- Leaderboards are now available and display *Top Players*. A *Top Friends* leaderboard is coming soon (image 5).
- The *Challenge Center* displays eight various daily missions, a timer, and rewards for completing any six of the missions (image 6).
- Completing challenges awards coin prizes and *Legacy Points* that are used to earn *Legacy Medals*. When enough *Legacy Points* have been earned, a medal dialogue appears notifying players of a coin prize and medals earned (image 7).
- Players may edit their profile, view all game stats, and connect with customer service through the *Game Center* (image 8).





# RETENTION STORY

Captivate players with more story-based elements. Scatter Slots' *Easter Countdown* gifts players daily baskets and new storyline pages

- The *Easter Countdown* icon and timer is visible in the map screen (image 1).
- The event window displays 12 baskets to collect daily (image 2).
- A dialogue appears displaying the daily reward. The reward may include VIP status, bonus upgrades, lottery tickets, gems, coins, and a treasure chest on the final day. In this example, \$4.54 worth of coins was collected (image 3).
- After collecting the daily reward, a storyline appears above a map. With every daily collection, the next indicator on the map lights up and a new page to the story is displayed (image 4).
- Collecting four daily gifts completes a story. There are three possible storylines (image 5).
- Once a story is completed, players are eligible to collect a special 'One Time Offer' for each story. The offer remains available to collect until the *Easter Countdown* event is over (image 6).

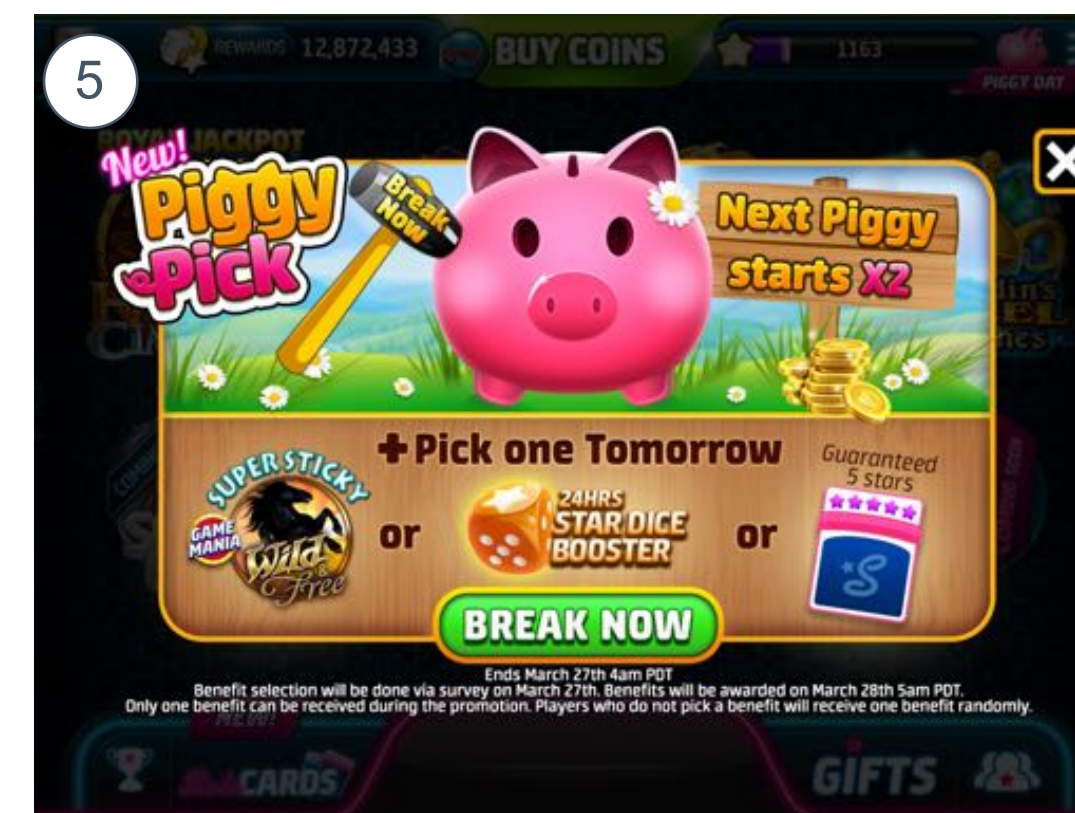
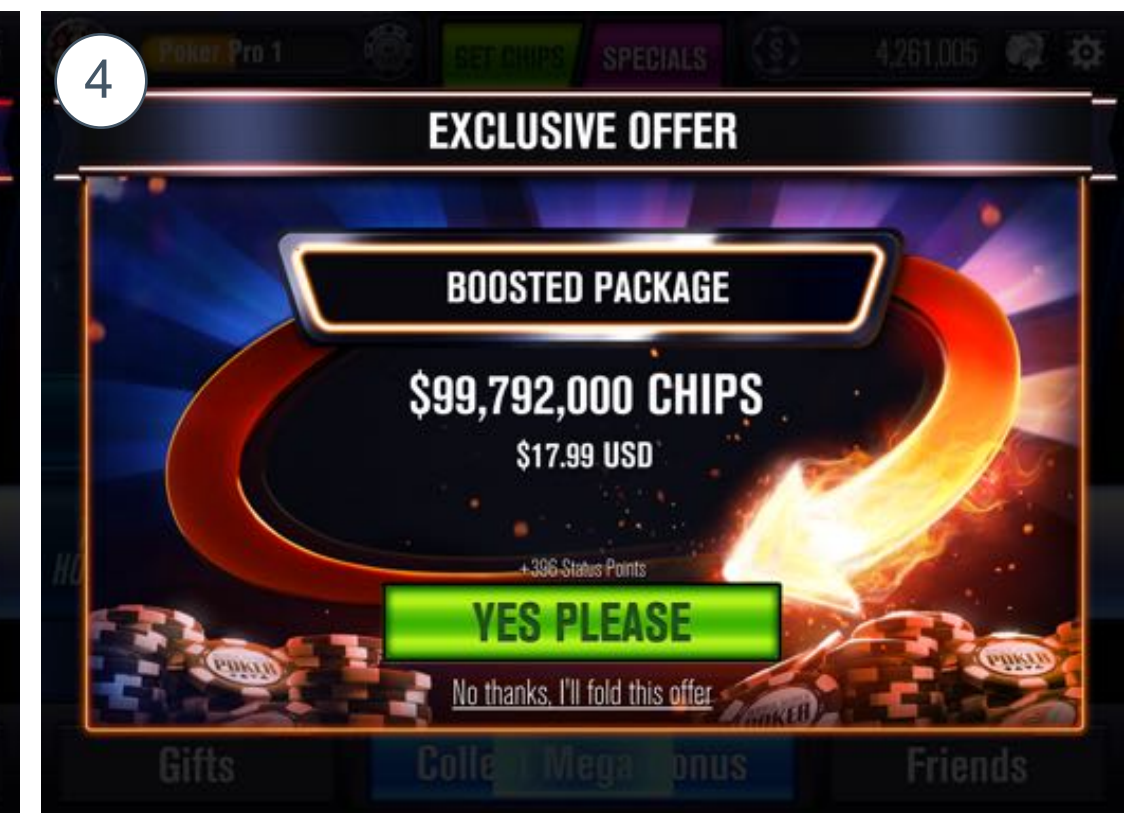




# RETENTION POLISH

Test subscriptions with a VIP-for-a-month mechanic. Upsell all purchases. Release select features to only high-level players

- **Add a subscription package to the VIP-for-a-month feature:** In FaFaFa Real Casino Slots, players may purchase a *Monthly Pass* that must be collected daily and renews payment automatically every month (image 1).
- **Allow players to swap power-ups:** Bingo Blitz's *Power-up Shuffle* lets players shuffle the power-up they received during play to another power-up (image 2).
- **Use every purchase opportunity to upsell:** In WSOP, players may purchase tickets for the *Billionaire Bash* (image 3). After the purchase, WSOP presents the player with an exclusive offer for a *Boosted Package* (image 4).
- **Allow players to pick their bonus with purchase:** In Slotomania, players making a *Piggy Bank* purchase may choose a bonus of *Game Mania*, *Star Dice Booster*, or *Slotocards* (image 5).
- **Release features exclusively to high-level players:** In Scatter Slots, features like *Battle Mode* and now tournaments are released to high-level players only (image 6).





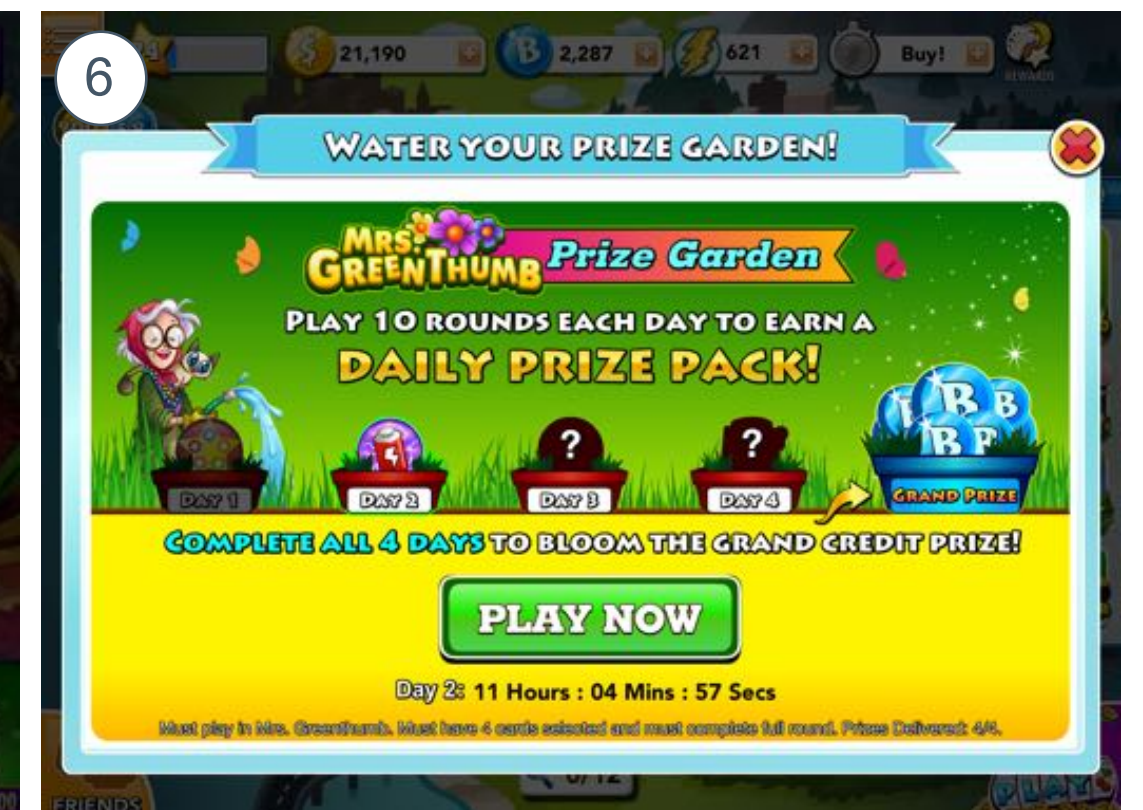
# LIVE OPS



# LIVE OPS

Provide jackpot bonuses for whale players. Add new awards for filling progress bars. Launch personalized daily win targets

- **Add mystery bonuses to jackpots with a purchase:** House of Fun's *Jackpot Surprises* awards a mystery gift with every jackpot won after players make a purchase (image 1).
- **Increase jackpot bonuses for payers:** House of Fun's *Jackpot Madness* increases the jackpot award wins. For example, the 6th jackpot receives 75% more coins (image 2).
- **Award new prizes for filling up an in-game progress bar:** In House of Fun's *Mystery of the Amazon* machine, filling the progress bar the 1st and 2nd time awards a coin bonus. Filling the progress bar a 3rd time awards one of four bonus games (image 3). During the *Mystery of the Amazon Challenge* event, every filled meter that awards coins receives 50% or 100% more coins and every filled meter that awards a bonus game gives players a coupon redeemable for another bonus game (image 4).
- **Launch personalized daily win target events:** In Wizard of Oz's *Scarecrow's Surprise*, all players receive a personalized win target for total chips won (image 5).
- **Make the consecutive bonus harder and with larger awards:** Bingo Blitz's *Mrs. GreenThumb Prize Garden* awards those who play at least ten rounds each day for consecutive days (image 6).





# MARKET WATCH

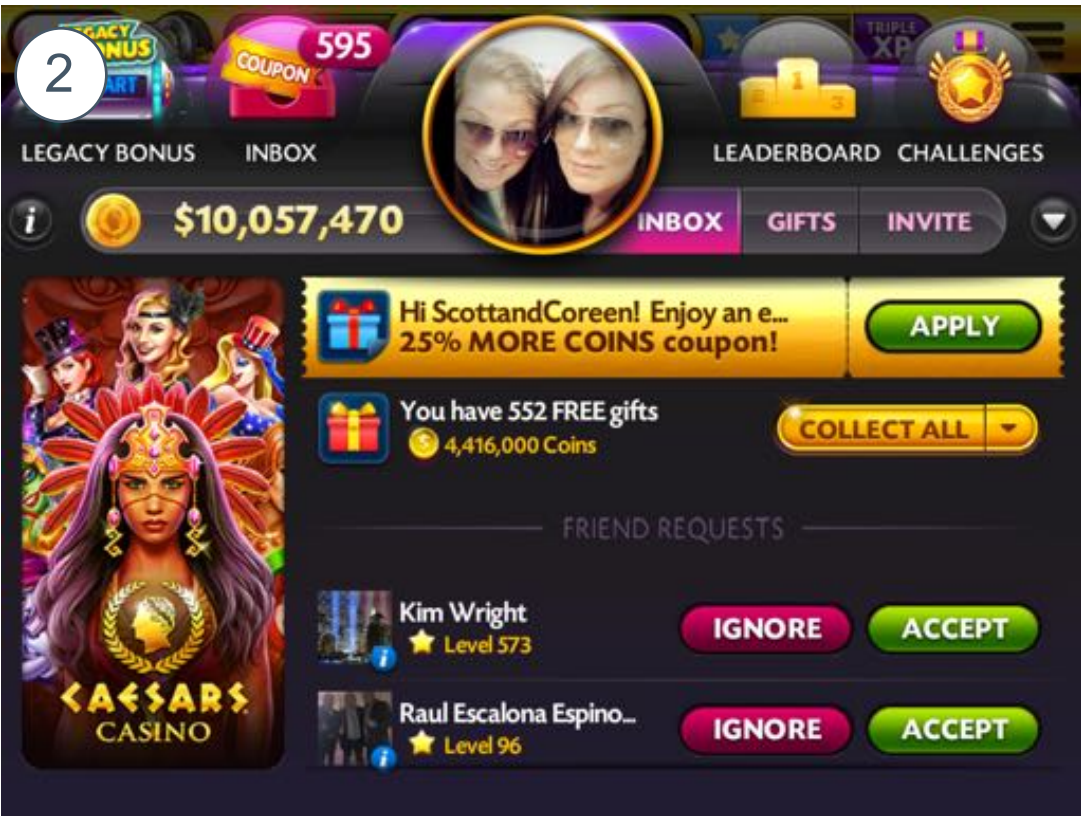
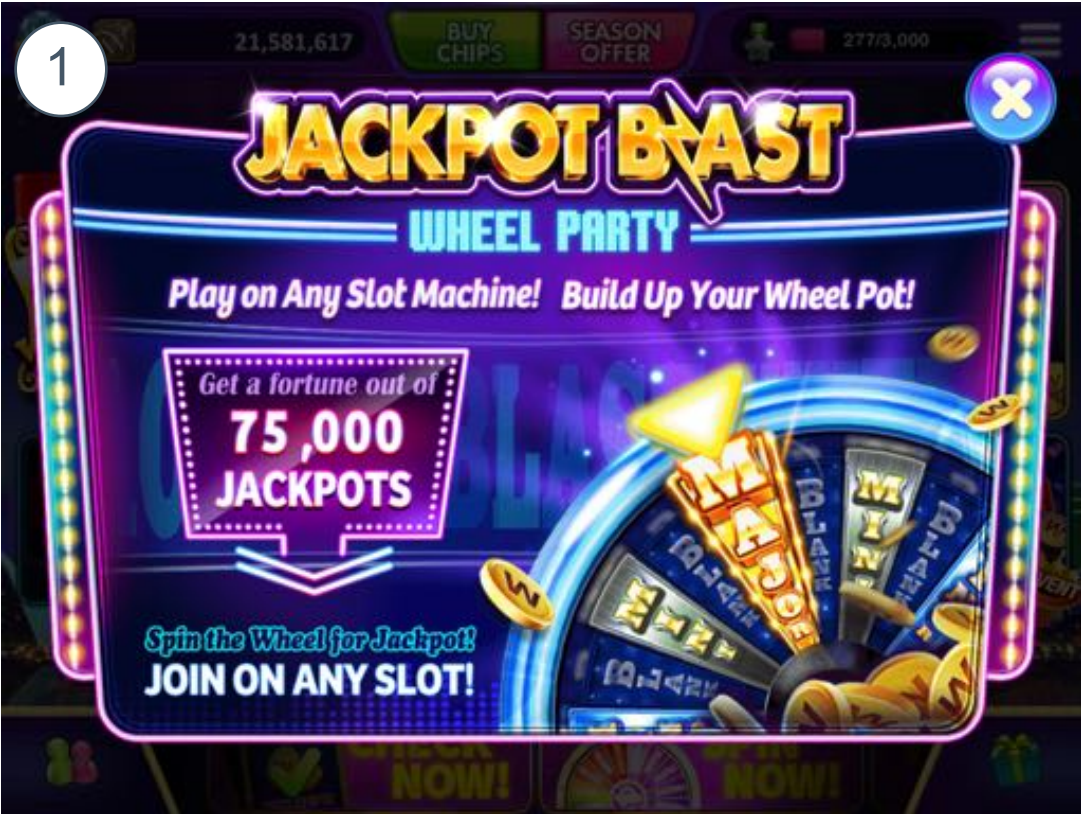
3/15/17 – 4/14/17



# SLOTS NOTABLE FEATURES I

DoubleU Casino released a progression system with a wheel bonus.  
Caesars Slots invested heavily in the *Game Center*. Hit it Rich added elaborate profiles

App	Notable features released
DoubleU Casino	<i>Jackpot Blast Wheel Party</i> : pool of accumulated chips for players to win after filling a progress bar (image 1, see following pages for details)
Caesars Slots	<i>Game Center</i> : an inbox with gifting, leaderboards, challenges to earn badges, and <i>Legacy Medals</i> (image 2, see New Innovations section for details)
Jackpot Party	<i>Jackpot Party Bingo</i> : bingo mini-game with multiple tiers and prizes (see following pages for details). <i>Party Prizes</i> : retention bonus system (see New Innovations section for details)
Slotomania	<i>Wheel of Stars (revamp)</i> : <i>Sloto Cards</i> and coins now awarded on the wheel (image 3)
Hit it Rich	<i>Profiles</i> : new profiles with gameplay stats shared over the <i>Loyalty Lounge</i> (see following pages for details). <i>The Land of Oz: New Adventure Land</i> : challenges in various machines to claim a jackpot prize
Scatter Slots	<i>Easter Countdown</i> : advent-style countdown that unlocks a story and coins (see New Innovations section for details). <i>Tournaments</i> : offered only to players level 45 and above (see New Innovations section for details)

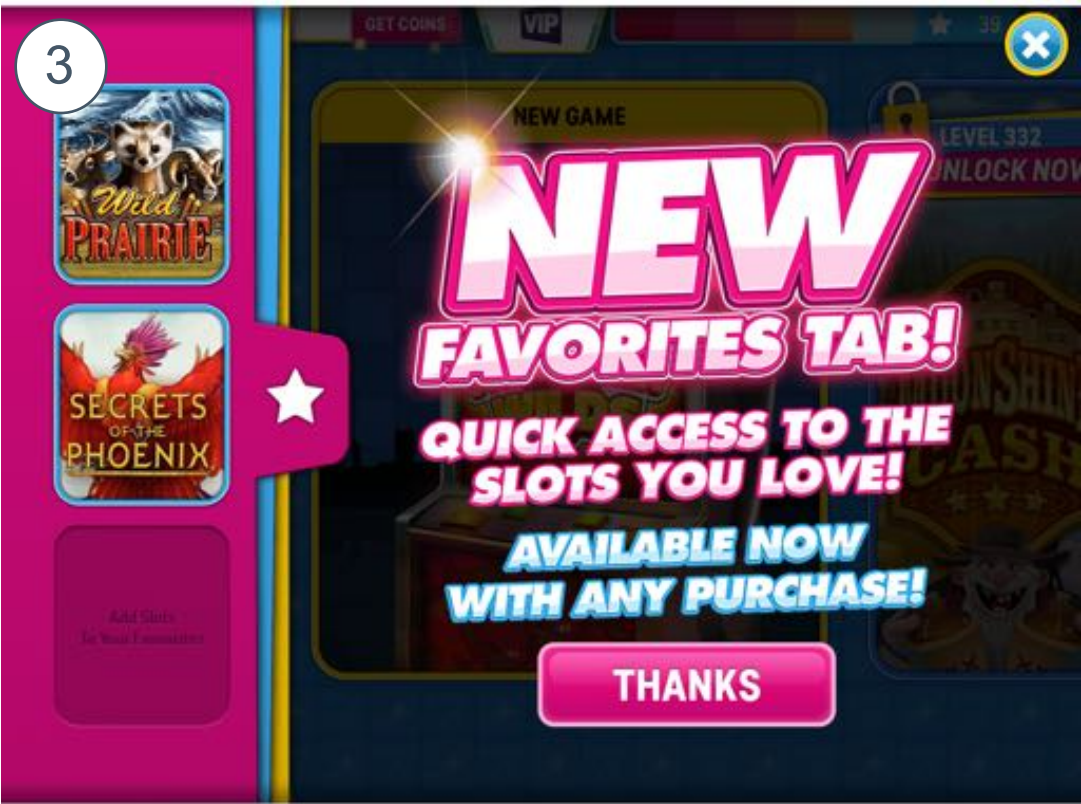




# SLOTS NOTABLE FEATURES II

myKONAMI Slots pushed a ticket mini-game. GSN Casino added a 4-hour coin bonus. Hot Shot Casino invested in a *Rewards Club*

App	Notable features released
myKONAMI Slots	<i>Ticket Mini-Game</i> : pick and match in a mini-game for prizes (image 1)
GSN Casino	<i>4-Hour Coin Bonus</i> : new retention coin bonus (image 2). <i>Survey</i> : in-game survey released using <i>Tap Research</i>
Hot Shot Casino	<i>Rewards Club</i> : loyalty program with seven benefit levels, a benefit cycle, and a new <i>Club Lounge</i> (see following pages for details)
Jackpotjoy Slots	<i>Favorites Tab</i> : quick access to selected machines with any purchase (image 3)
FaFaFa Real Casino Slots	<i>Monthly Pass</i> : VIP-for-a-month subscription package (see New Innovations section for details)





# BINGO & POKER NOTABLE FEATURES

Bingo Blitz boosted the *Gift Center*. Bingo Pop released a *Piggy Bank*. Pokerist added Omaha

App	Notable features released
Bingo Blitz	<i>Gift Center</i> : ability to request, send, and collect gifts (image 1, see following pages for details)
Bingo Bash	<i>Content Survey</i> : survey launched using <i>Qualtrics</i>
Bingo Pop	<i>Piggy Bank</i> : unlock cherries collected with a \$2.99 purchase (image 2)
WSOP	<i>Consecutive Bonus</i> : daily rewards for logging in consecutive days. <i>Collector's Chip Challenge</i> : a pick'em mini-game with more eggs coming soon
Pokerist	Omaha added to the game lineup
Fresh Deck Poker	<i>Weekly Bonus Boost</i> : additional chips with every bonus collection for \$12.99 (image 3)

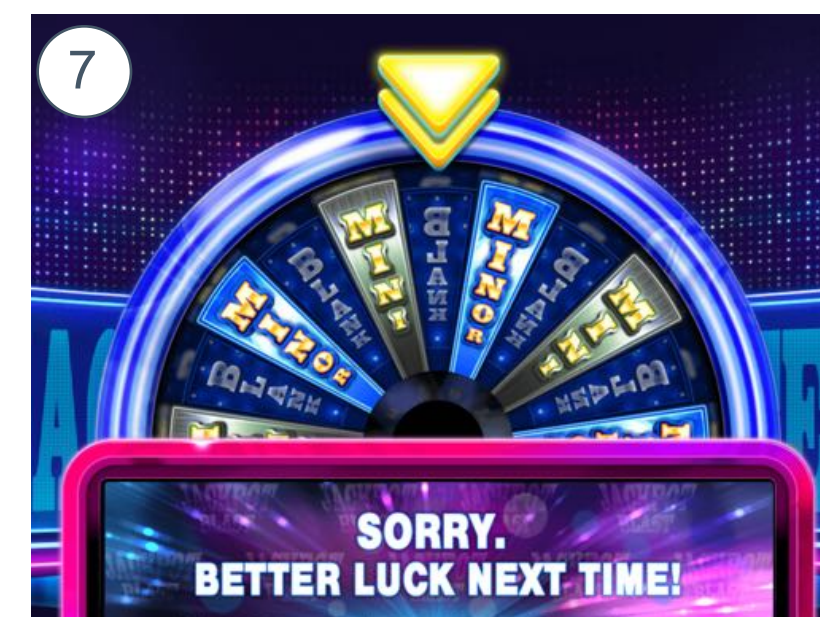
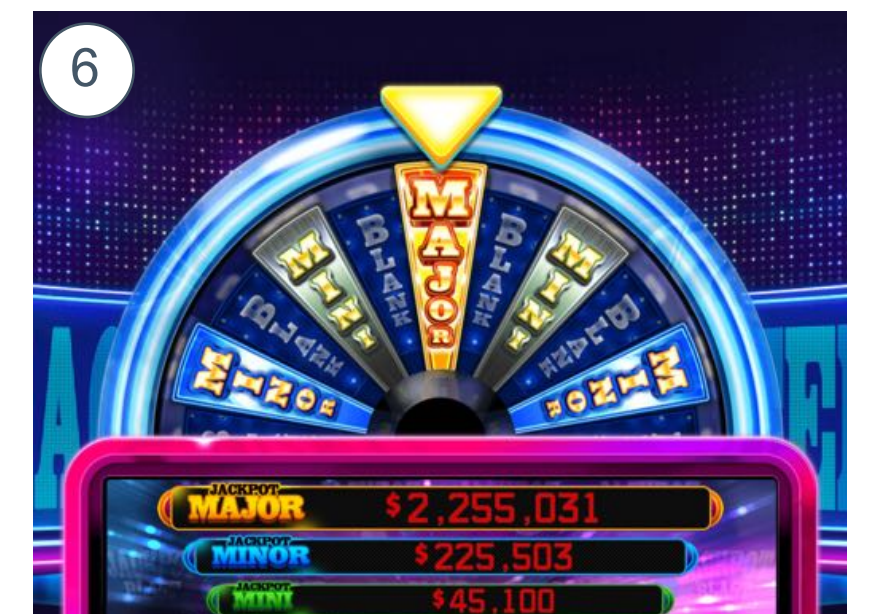




# DOUBLEU CASINO

DoubleU Casino's *Jackpot Blast Wheel Party* offers a *Weekly Bonanza* event: fill a meter during play to spin a progressive jackpot wheel

- *Jackpot Blast Wheel Party* is introduced upon app-entry (image 1).
- The feature is a *Weekly Bonanza* event on Saturdays that ends when all jackpots have been hit (image 2).
- A *Jackpot Blast Wheel* is available in any machine with certain bets and non-qualifying bets trigger a notice at the top of the screen (image 3).
- Every spin contributes to a 'My Wheel Pot' amount displayed next to a wheel and meter (image 4).
- Once the meter is full, players either choose to start the *Jackpot Blast* or keep playing for a bigger pot (image 5).
- When a player chooses 'Spin,' a wheel appears with various wedges: *Mini*, *Minor*, *Major*, and *Blank* (image 6).
- If the wheel stops on a *Blank* wedge, a notice appears saying, "Sorry. Better luck next time!" (image 7).
- Landing on a prize wedge awards the corresponding jackpot amount. In this example, \$3.36 worth of coins was awarded for a *Minor* wedge (image 8).

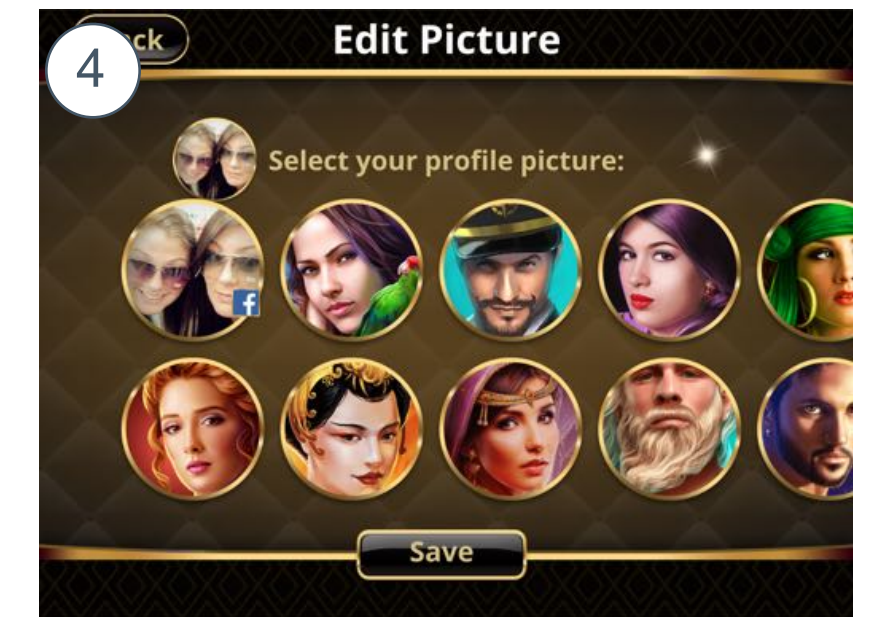
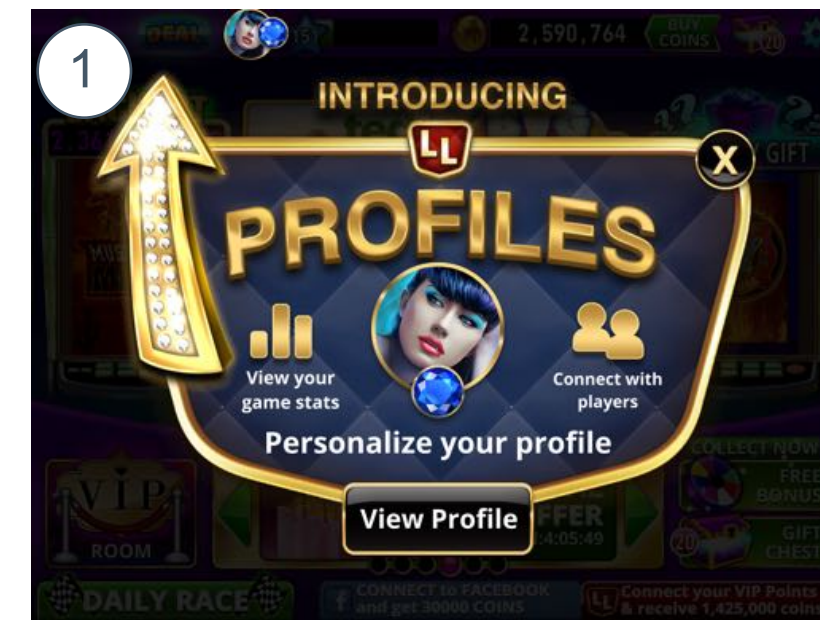




# HIT IT RICH

Hit it Rich adds profiles to allow players to view game stats and connect with other players

- Player profiles are introduced with a dialogue upon app-entry (image 1).
- The main profile window displays a 'What's On Your Mind' statement, avatar picture, VIP status, level, most-played machine, and biggest win (image 2).
- Profiles may be personalized and avatar pictures changed (image 3).
- Clicking 'Edit' displays various profile images to choose from, and Facebook-connected accounts will display their current Facebook picture (image 4).
- The 'Games' tab displays game icons and a list of stats: biggest win, level, number of daily races won, favorite machine, and last played (image 5).
- Clicking on a game icon displays all the current stats for that game (image 6).
- More game links are coming soon (image 7).
- Clicking on a game icon that is not connected through the *Loyalty Lounge* displays a message explaining that a connection must be made before stats are displayed (image 8).





# BINGO BLITZ

## Bingo Blitz's *Gift Center* adds a one-click option to claim and return all gifts

- A dialogue announces a new and improved *Gift Center* upon app-entry (image 1).
- The new *Gift Center* icon is visible on all map screens (image 2).
- A welcome dialogue appears on selection (image 3).
- The *Gift Center* displays a 'Send & Request' button and three sections for each type of gift: bingo credits, power-ups, and slot spin packs (image 4).
- Players now have the ability to collect specific gifts or collect them all with the 'Claim 1' or 'Claim All' buttons. Checking 'Send Back' returns similar items back to senders (image 5).
- 'Send' and 'Request' buttons are available for gifting options (image 6).
- One of each gift type may be sent to all friends every 24 hours (image 7).
- One of each gift type may also be requested from friends every 24 hours. After requests for one type are sent, players are instructed to request another type of gift (image 8).

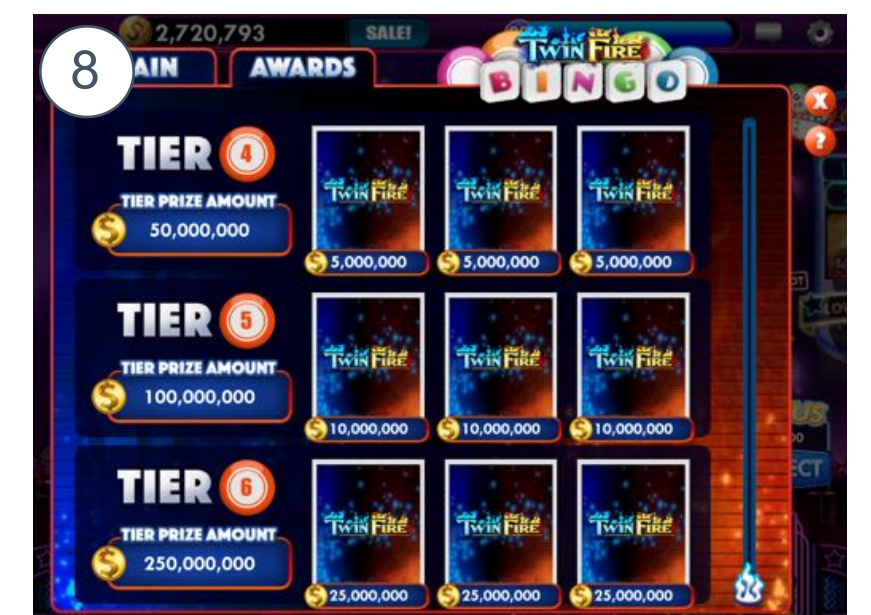
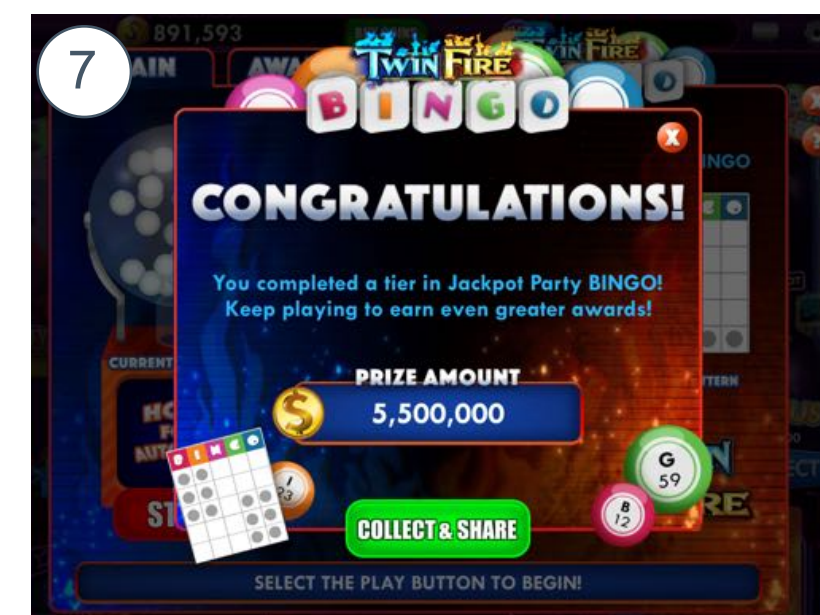
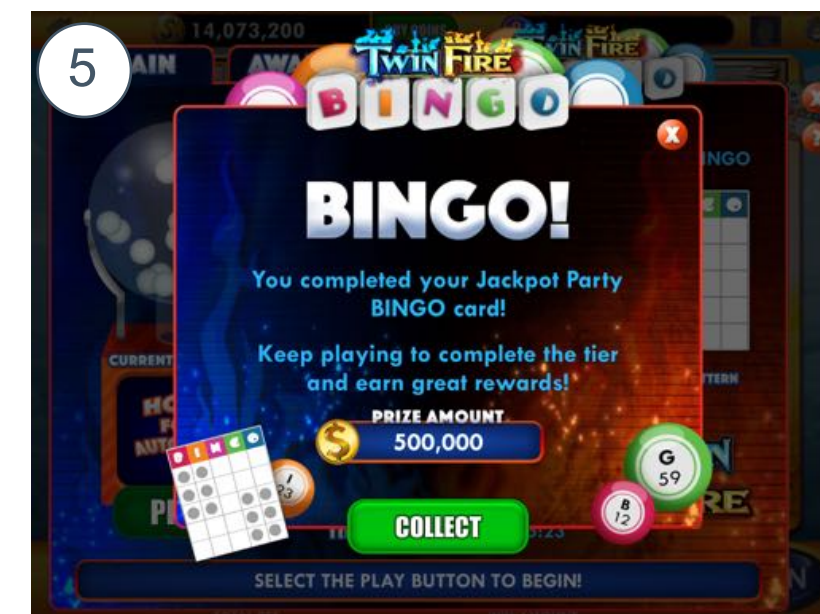
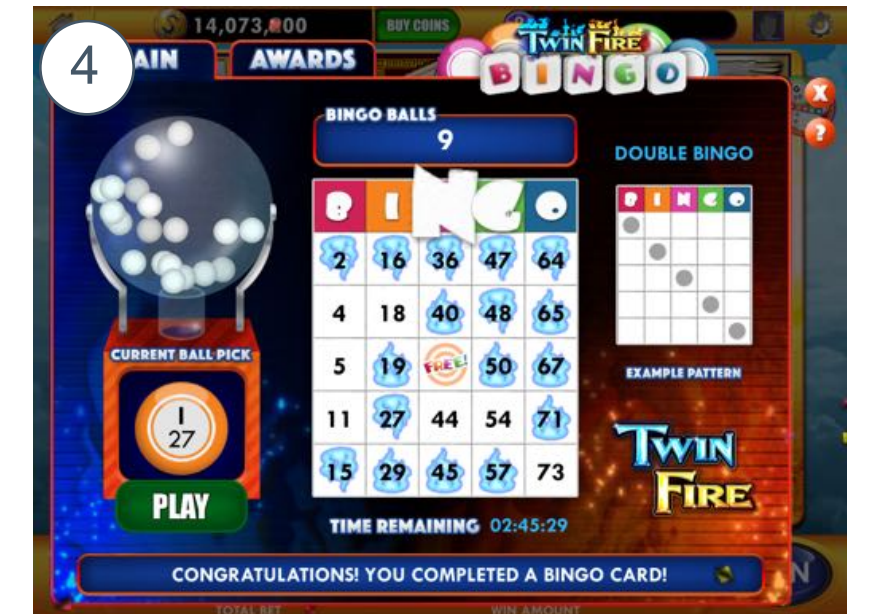
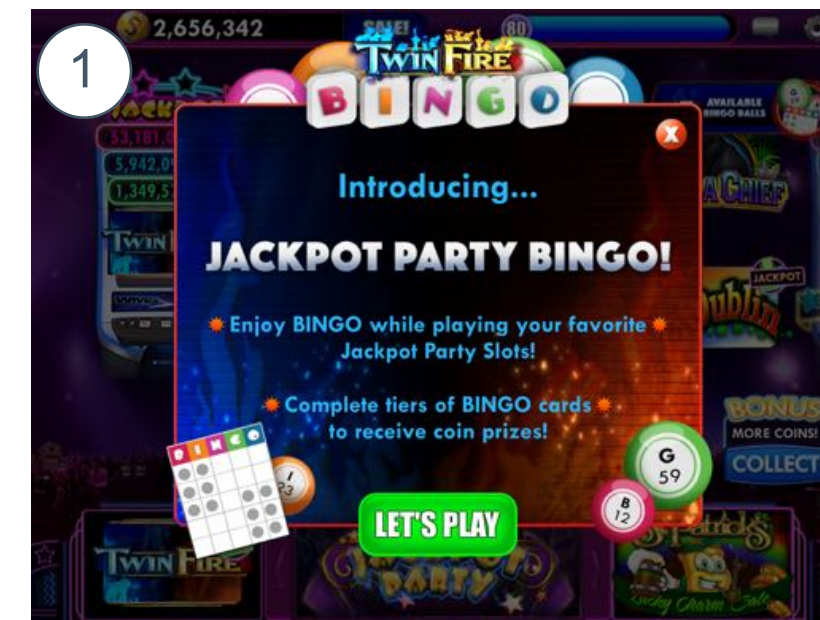




# JACKPOT PARTY

Jackpot Party's new mini-game *Jackpot Party Bingo* allows players to complete bingo patterns for prizes and move up tiers for bigger rewards

- A dialogue introduces *Jackpot Party Bingo* upon app-entry (image 1).
- A pattern card, bingo play card, number of bingo balls, and ball chute appear (image 2).
- Pressing play or holding the auto play button reveals bingo numbers. Called numbers will be automatically marked (image 3).
- Bingos are automatically called when a pattern is completed. In this example, a double bingo was triggered. Any remaining balls are held for another card (image 4).
- A dialogue box appears with the award prize amount and notifies players of bingo card completion. This bingo awarded \$0.42 worth of coins (image 5).
- Clicking on the 'Awards' tab displays various prize tiers, each containing three bingo cards to complete for additional prizes (image 6).
- After completing the third bingo card in a tier, players are awarded both the bingo and tier prizes. In this example, \$4.58 worth of coins was awarded (image 7).
- There are six different tiers to complete. Each bingo card completed in tier six awards \$20.80 worth of coins and an additional \$207.92 worth of coins for completing the tier (image 8).
- Additional bingo balls may be awarded by collecting bonuses, leveling up, unlocking machines, purchasing coins, hitting big wins, or hitting a jackpot.
- This bingo mini-game unlocks at level two and is for a limited time only (ended on 4/13/17).





# HOT SHOT CASINO

Hot Shot Casino's *Rewards Club* offers benefit tiers on a timed cycle and a *Rewards Lounge* with exclusive machines

- Upon app-entry, a two-part dialogue box appears outlining a new *Rewards Club* and offering players to join (images 1 and 2).
- The *Rewards Club* icon displays a player's current club tier at the bottom of the lobby (image 3).
- Clicking the icon opens the club page that displays tier status, a fill-meter to the next tier, and days left to gain new status (image 4).
- The *Rewards Club* operates on a one month cycle with points and status being reset at the end of each cycle. Players retain benefits from the previous cycle while trying to reach a new status tier (image 5).
- There are six status tiers: *Silver*, *Gold*, *Emerald*, *Sapphire*, *Ruby*, *Diamond*, and *4CT Club*. Benefits on purchases, loyalty points, gifts, and collection links increase with each tier (image 6).
- The highest tier is the *4CT Club* and offers exclusive member benefits and entry into a separate *4CT Lounge* (image 7).
- Entry into the *Club Lounge* is made through the *Rewards Club* page. The *Club Lounge* offers exclusive machines based on level with the *4CT Lounge* visible in the background (image 8).



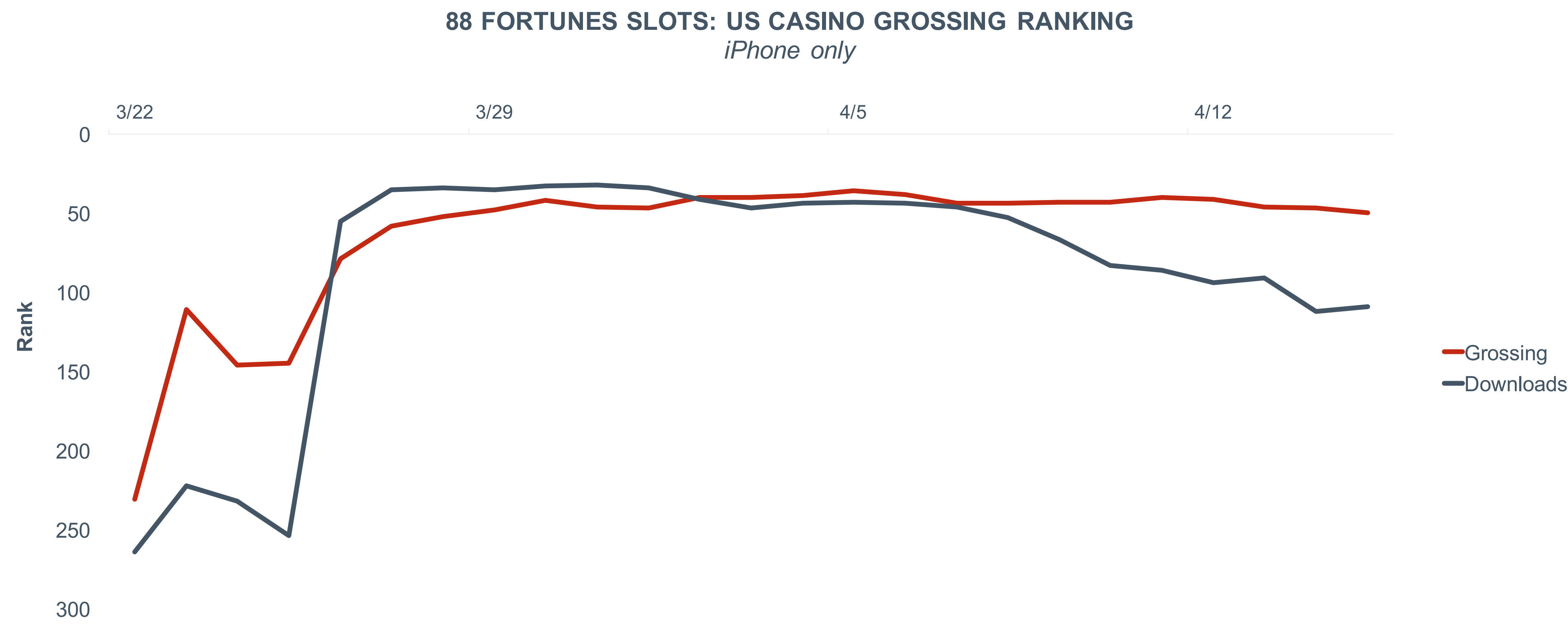


# ECONOMY TEARDOWN: 88 FORTUNES SLOTS



# RANKING TREND

88 Fortunes Slots jumped to the top 40 grossing social casino US game after hard launch and has remained at or below this position





# FEATURES

Phantom EFX's new game 88 Fortunes Slots progresses players along a map to unlock new machines

- At app-launch, players are awarded \$1.27 worth of coins for connecting to Facebook (image 1).
- An 'Episode' based layout appears with a map and two episodes for progression (image 2).
- Players may gift friends a maximum of 20 mystery gifts per day (image 3).
- The primary bonus is awarded daily, with an increasing return bonus for consecutive days. The secondary bonus is collectable every two hours (image 4).
- The game offers level up rewards that may be coins, higher max bet, increased bonus amounts, unlocked machines, and store discounts (image 5).
- The *Hermit's Bird Collection* is available in *Episode 1* and unlocks at level three (image 6).
- Birds are collected randomly during play. Each machine has a separate collection (image 7).
- Completing the *Hermit's Bird Collection* in *Episode 1* unlocks a special machine (image 8).





# ECONOMY HIGHLIGHTS

88 Fortunes Slots has a tight economy. New players receive a below average amount of coins initially and small amounts of coins daily, relying heavily on progression and machine content to monetize players early

CATEGORY	VALUE	vs. OTHER TOP GAMES
New user coins	\$1.27	26 <sup>th</sup> largest
Primary coin bonus daily payout*	\$0.33	25 <sup>th</sup> largest
Secondary coin bonus daily payout*	\$1.14	22 <sup>nd</sup> largest
Tertiary coin bonus daily payout	N/A	N/A
Total coin bonus daily payout	\$1.47	26 <sup>th</sup> largest
\$1 worth of non-sale coins**	1.58M	4 <sup>th</sup> largest
Default bet new user tuning	44 spins	24 <sup>th</sup> largest
Minimum bet new user tuning	133 spins	23 <sup>rd</sup> largest

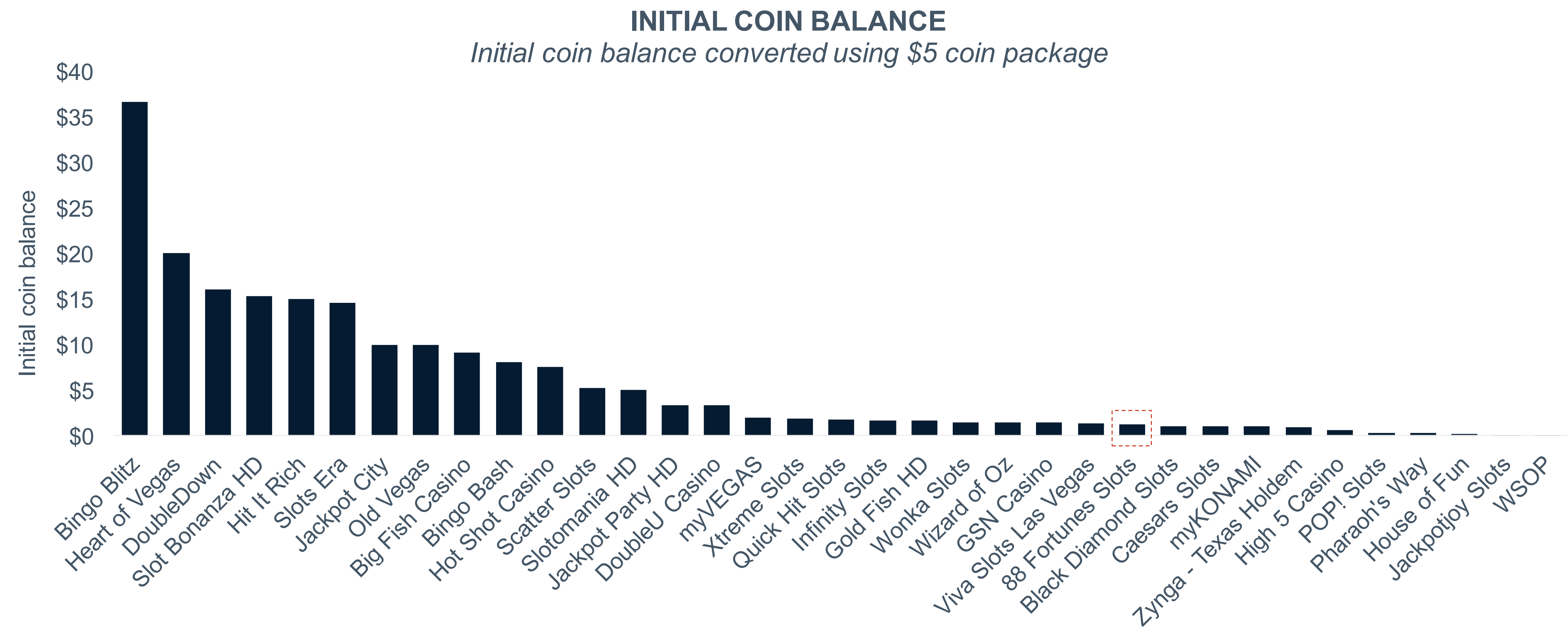
\*The primary coin bonus is paid out daily and the secondary coin bonus is paid out more frequently

\*\*Converted using \$5 coin package



# INITIAL COIN BALANCE

88 Fortunes Slots has a below average amount of initial coins compared to top grossing games with \$1.27 worth of coins given to new players

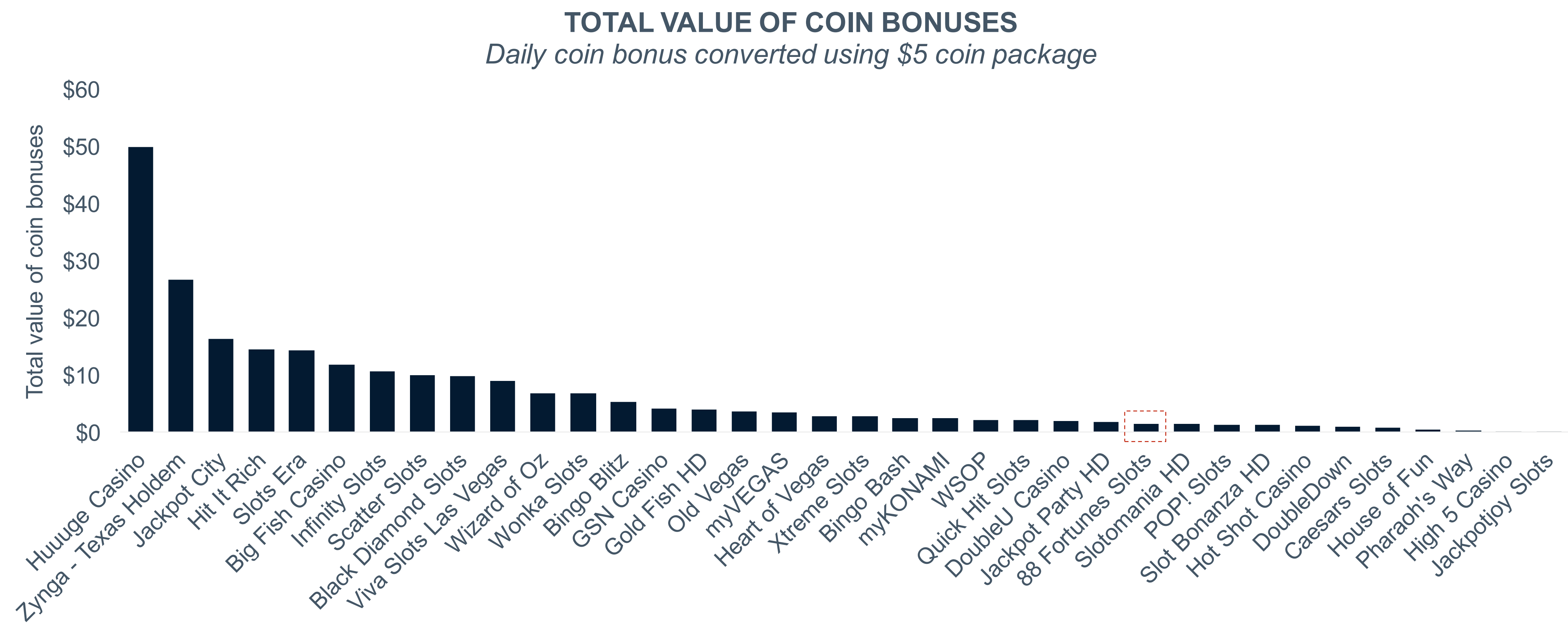


\*Huuuge Casino (\$85.99) was removed as an outlier



# TOTAL VALUE OF COIN BONUSES

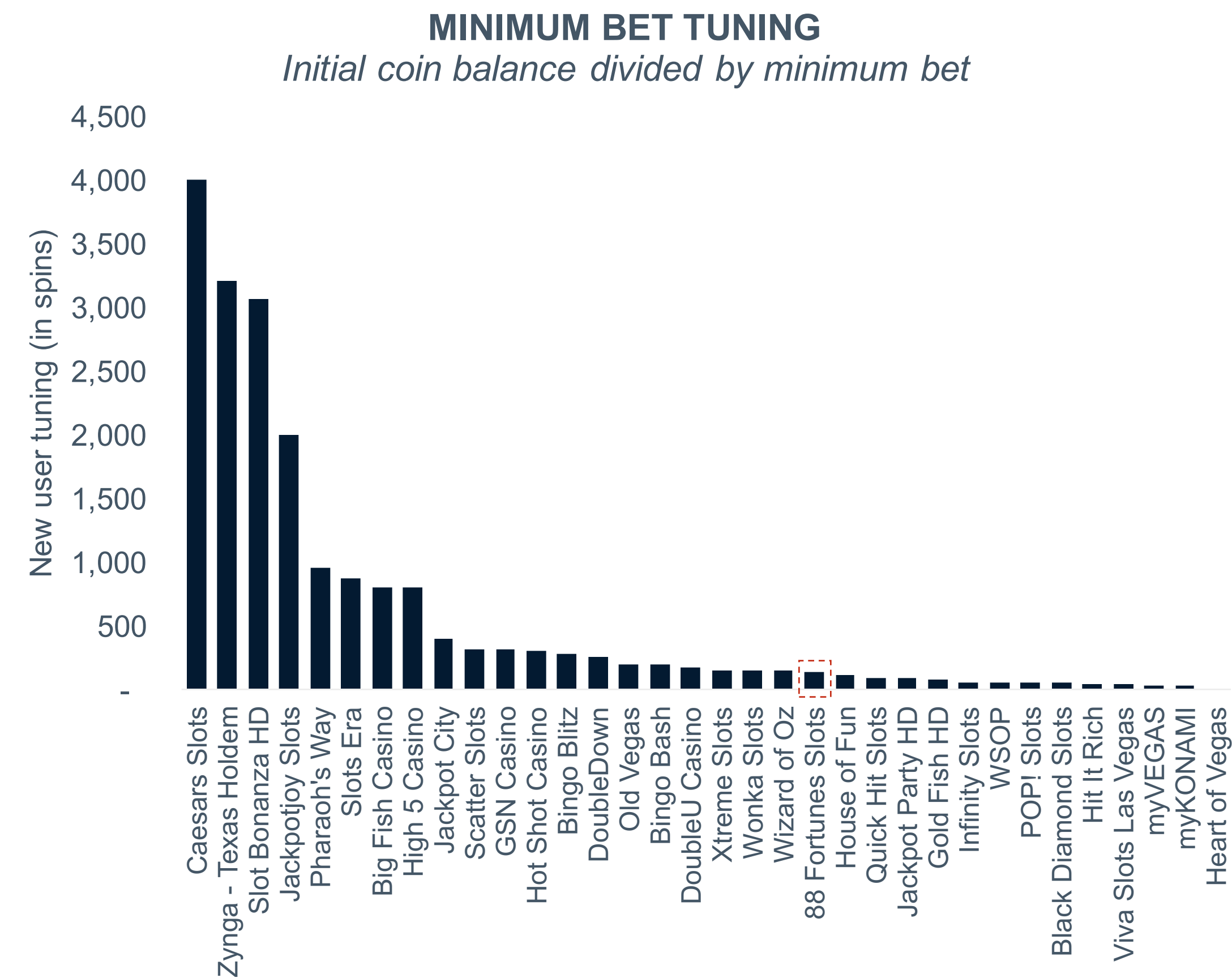
88 Fortunes Slots gives a below average amount of free coins daily. The secondary coin bonus is 78% of the payout (paid out 12x per day). There is only a primary and secondary coin bonus



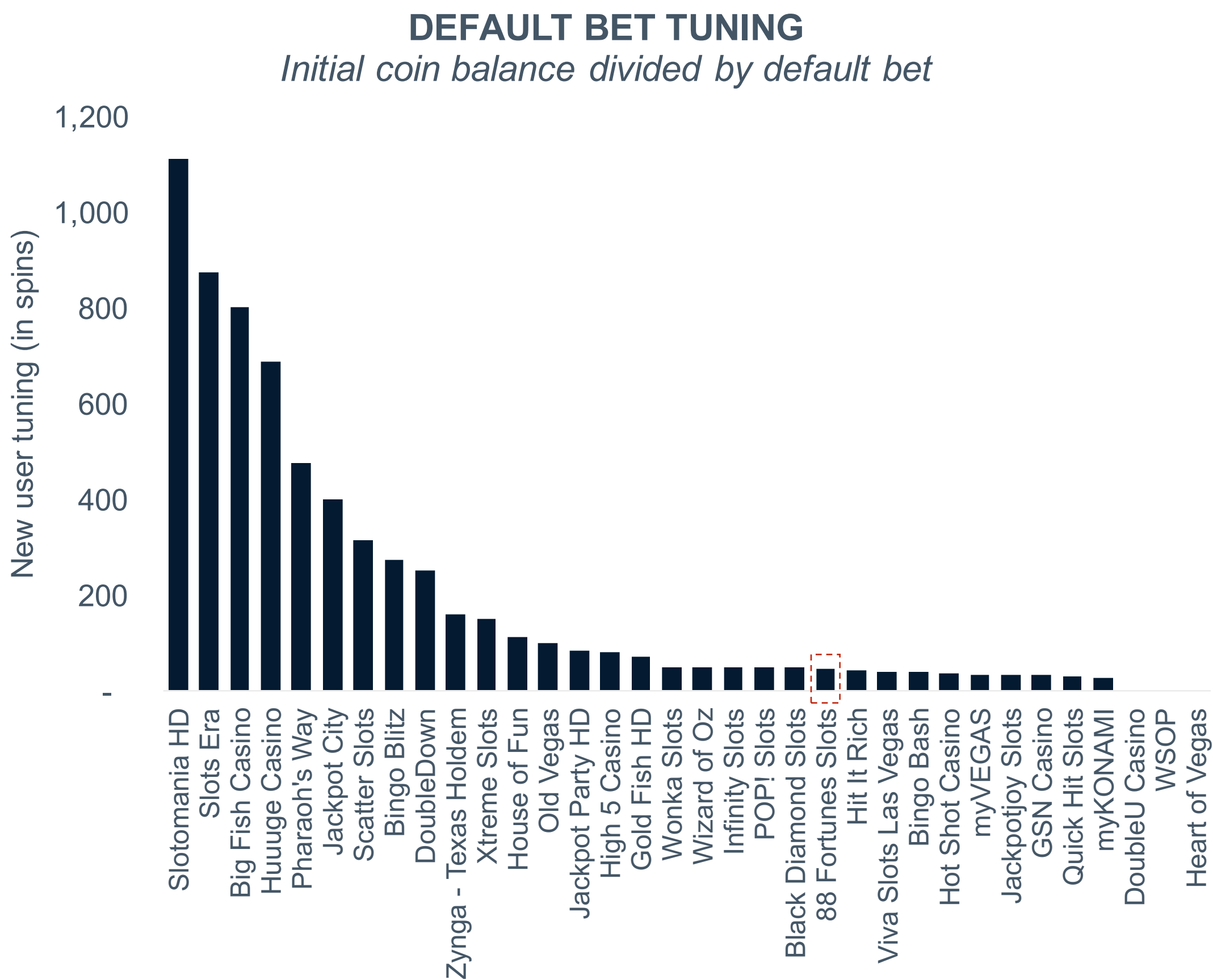


# NEW USER TUNING

88 Fortunes Slots’ new user bet tuning is average, with 133 spins for the minimum and 44 spins for the default bets. New users receive a below average amount of play time at the minimum and default bets



\*Huuuge Casino (20.6K spins) and Slotomania (11.1K spins) were removed as outliers

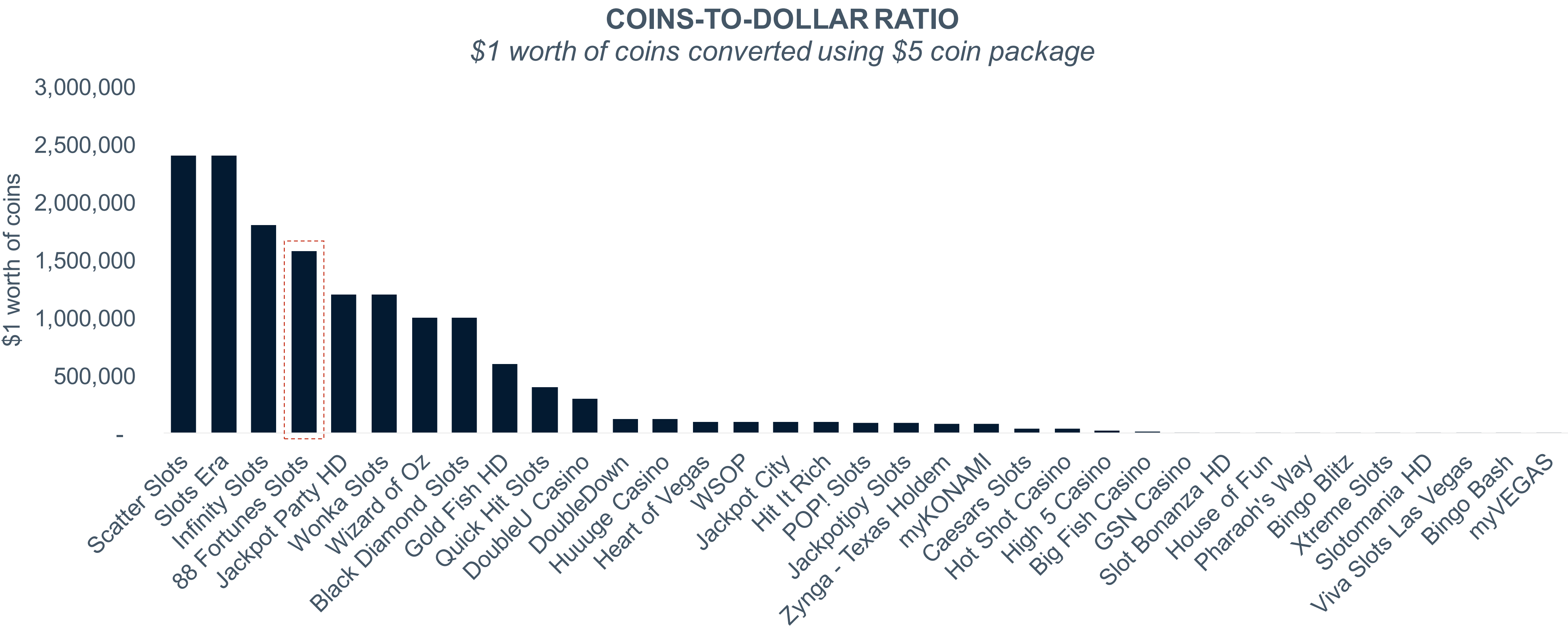


\*Caesars Slots (4.0K spins) and Slot Bonanza (3.0K) were removed as outliers



# COINS-TO-DOLLAR RATIO

88 Fortunes Slots has a high coins-to-dollar ratio relative to top grossing games with 1.58M coins for every dollar spent





# APPENDIX



# DATA COLLECTION PROCESS



Recommendations, information, and data comes from market research, app intelligence tools, and deep analysis of the games

## Market research

- Each game is reviewed weekly for updates, regardless of whether the game has been updated through the App Store.
- Transaction information comes from the iOS App Store's In-App Purchases tab. These transactions are ranked based on the number of transactions.
- Las Vegas player insights come from online sources, such as the Las Vegas Convention and Visitors Authority and the UNLV Center for Gaming Research.
- Progressive jackpot information comes from online research, specifically from Wizard of Odds.
- Trending revenue, downloads, and package-rank data come from Priori Data, a Liquid and Grit partner.

## Game information

- Game information comes from a deep-dive analysis of each game.
- In the economy section and economy-related slides, the coin value is determined by converting coins into money using \$5 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, the value of the minimum bet is \$10. For games without a \$5 package, the next closest package is used.
- The cost of each level is determined by how many coins are needed to complete it. Then, that amount is converted to a dollar amount using \$5 worth of non-sale purchasable coins, as mentioned above.



*In the midst of chaos, there is also opportunity*

– Sun Tzu, *The Art of War*

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