



LIQUID AND GRIT

Social Casino Product Report

Competitive research and actionable product recommendations

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JULY

2017

INTRODUCTION



"Innovation is the specific instrument of entrepreneurship. The act that endows resources with a new capacity to create wealth."

– Peter Drucker, renowned business writer

Dear Product Owner,

This month, you should be aware of three new innovations in social casino. The first, released by Jackpotjoy Slots, connects with players through their cell phone numbers. Our research and experience shows that players are surprisingly willing to provide personal information, such as cell phone numbers and emails. This could be a new, strong retention channel.

Next, Slotomania is experimenting further with payback incentives to drive purchases. At least one economy-based test should be in your roadmap each quarter, given their low development cost and powerful potential impact.

Lastly, pay attention to DoubleU Casino's buy page flow. A \$99.99 purchase unlocks a heavily-discounted package AND awards purchasers with five days of unexpected gifts. This feature has been around for a few months, but it is important enough to be re-examined.

In the Economy Teardown, you will find details on Murka's Scatter HoldEm Poker. This app climbed from release to a top 50 grossing social casino app in five months. Scatter HoldEm Poker, like Scatter Slots, provides players with large initial coin balances to produce strong early retention and a slower monetization curve. This is a prudent strategy for long-term growth.

Innovation is an instrument to wealth.

Brett Nowak
Editor-in-Chief

NEW INNOVATIONS

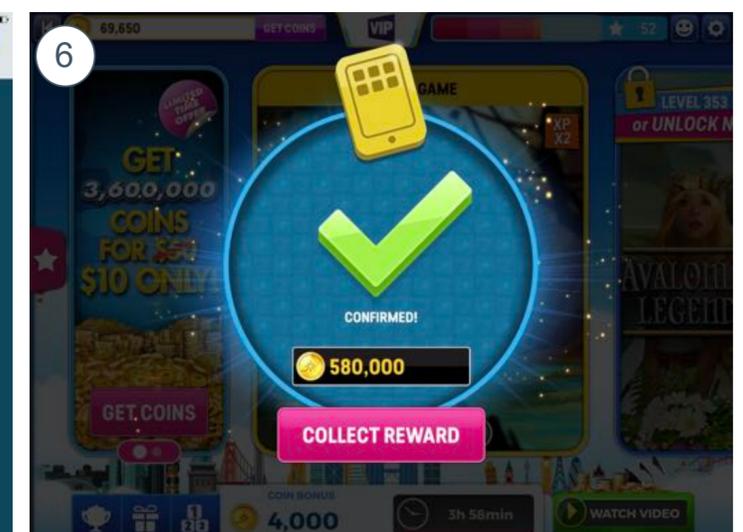
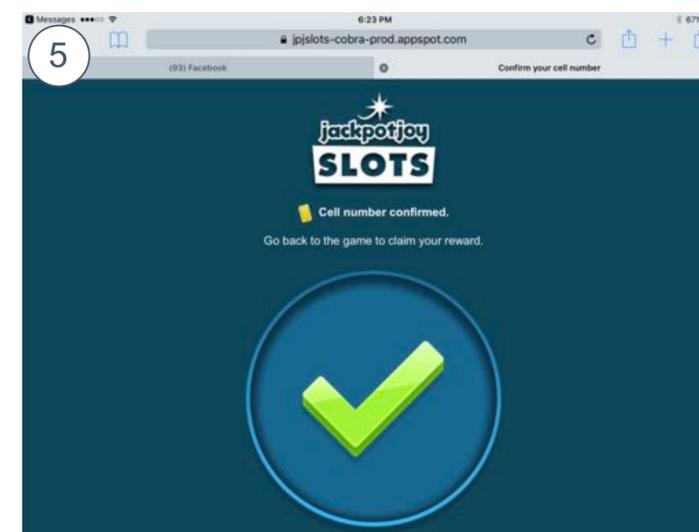
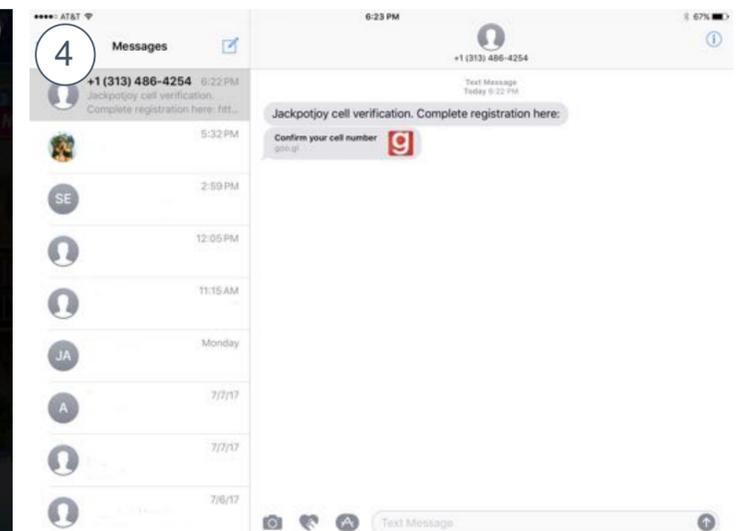
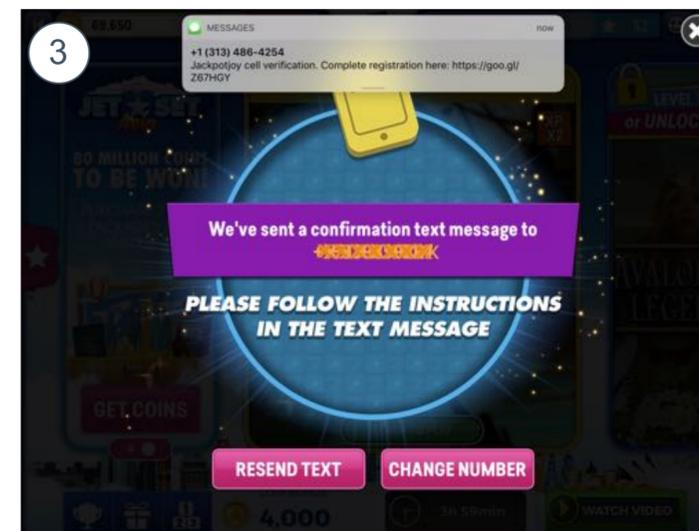
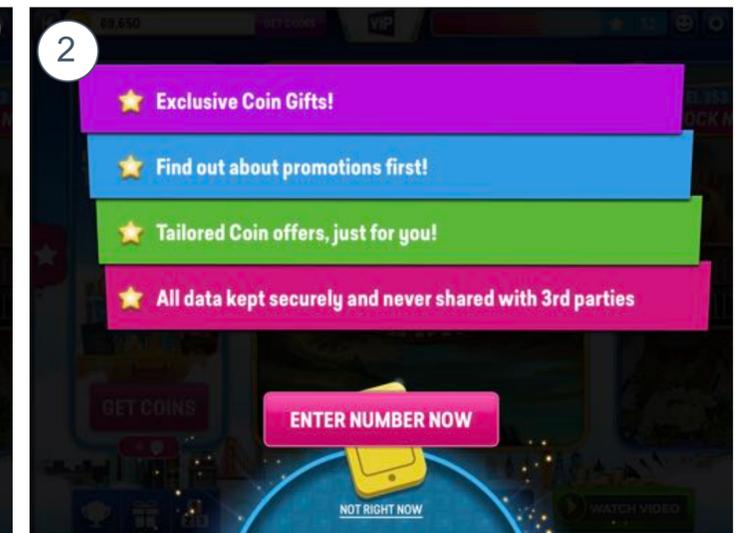
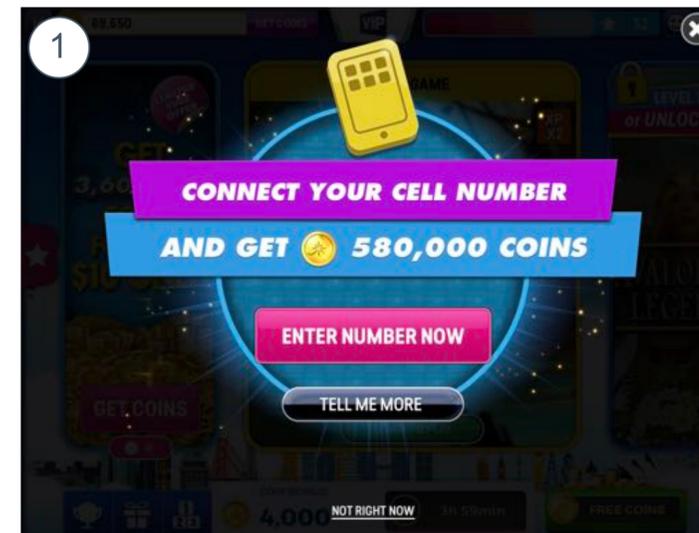
NEW INNOVATIONS

Feature	KPIs	Recommendations
Connect Cell Phones	<ul style="list-style-type: none">• Boost retention	<ul style="list-style-type: none">• Connect to players through their cell phones to create a sticky notification channel to boost retention• Think long-term in your outreach strategy
Payback Mechanics	<ul style="list-style-type: none">• Increase transactions	<ul style="list-style-type: none">• Give players back a percentage of their lost chips for a set time period after any purchase• Sell payback packages to increase transactions
Unlock Special Packages & Surprise Bonuses	<ul style="list-style-type: none">• Drive revenue• Improve LTV	<ul style="list-style-type: none">• Invest in multi-step buy page logic to drive revenue per transaction and transactions per player• Surprise and delight players with unexpected bonuses post-purchase
Retention Polish Quick Hits	<ul style="list-style-type: none">• Drive revenue• Boost retention	<ul style="list-style-type: none">• Trigger events when players run out of coins• Explore simple buildables• Unlock a sale's cost and discount with a gambling mechanic• Showcase machine lobby cards based on novelty, previous play, and likelihood to enjoy

CONNECT CELL PHONES

Connect to players through their cell phones to create a sticky notification channel to boost retention. Think long-term in your outreach strategy

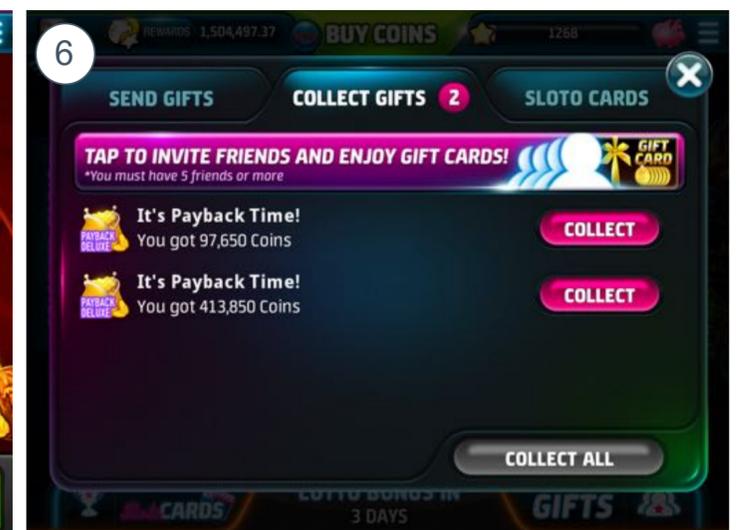
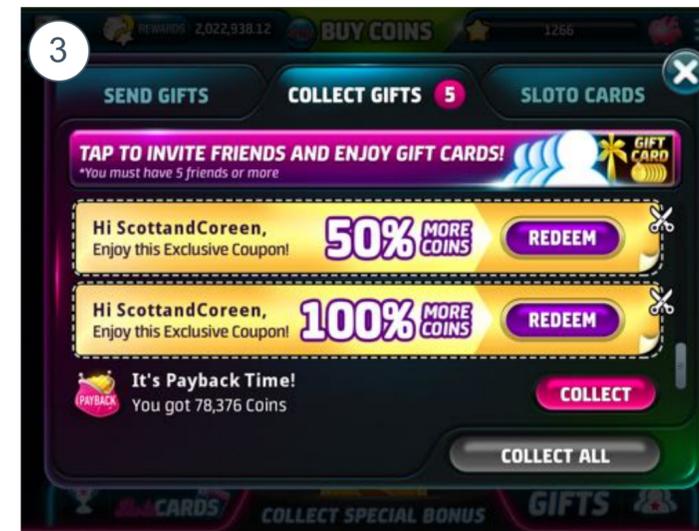
- In Jackpotjoy Slots, players receive \$16.08 worth of coins to connect their cell phones (image 1).
- Connected players receive coin gifts, early promotion information, and tailored coin offers (image 2).
- Successfully entering a cell phone number prompts a dialogue with a verification text message (image 3).
- To complete registration, players receive a link via text message (image 4).
- Opening the link completes registration, notifying players to open the app to claim the reward (image 5).
- Upon app re-entry, a dialogue appears with the reward for connecting a cell phone (image 6).



PAYBACK MECHANICS

Give players back a percentage of their lost chips for a set time period after any purchase. Sell payback packages to increase transactions

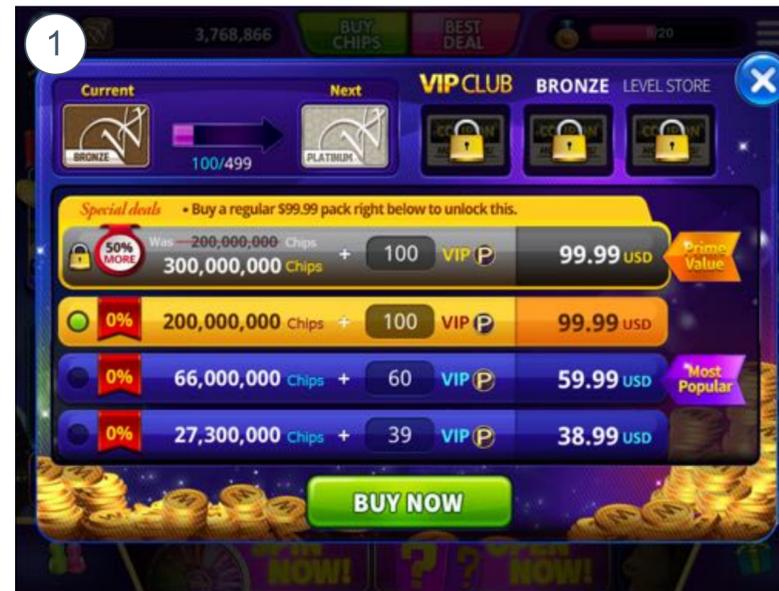
- In Slotomania, a new *2 Hrs Payback* is added to any purchase that activates a 0.2% payback on qualifying bets (image 1).
- In a machine, clicking the *2 Hrs Payback* feature icon displays the amount of coins accumulated (image 2).
- *2 Hrs Payback* coins are delivered to the inbox after time expires (image 3).
- *Payback Deluxe* is a purchasable timed feature that gives 3.0% payback on non-winning spins for one hour (image 4).
- When activated, *Payback Deluxe* is also displayed with an icon showing accumulated coins (image 5).
- *Payback Deluxe* coins are collected in the inbox when the feature is complete (image 6).



UNLOCK SPECIAL PACKAGES & SURPRISE BONUSES

Invest in multi-step buy page logic to drive revenue per transaction and transactions per player. Surprise and delight players with unexpected bonuses post-purchase

- In DoubleU Casino's coin store, a special deal is unlockable by purchasing a \$99.99 coin package (image 1, first introduced in the May 2017 Social Casino Product Report).
- Purchasing the coin package awards 100 VIP points (image 2).
- Coin store purchases also award five days of *Special Gifts*, an unexpected bonus given to purchasers (image 3).
- After the qualifying purchase is made, the *Prime Deal* unlocks, displaying a timer to make another \$99.99 purchase with a '50% More' chips bonus (image 4).



RETENTION POLISH QUICK HITS

Trigger events when players run out of coins. Explore simple buildables. Unlock a sale's cost and discount with a gambling mechanic. Showcase machine lobby cards based on novelty, previous play, and likelihood to enjoy

- **Trigger a larger level up bonus and countdown timer when players run out of chips:** In House of Fun, a *Special Challenge* appears when players who are close to leveling run out of coins. A dialogue appears challenging players to level up before time runs out for an increased level bonus (image 1).
- **Use buildable mechanics to drive retention:** In Slotomania, a *Coin Tree* is presented at log-in with a 'Collect Your Coins' button. Players are encouraged to return the next day to see a bigger tree and collect a larger bonus (image 2).
- **Hide discounts behind gambling mechanics:** In Hit it Rich, an animated game show host and The Price is Right themed wheel introduces *Rich's Lucky Deal*. Each side of the wheel spins, determining the coin package cost and discount (image 3).
- **Show players machines in the lobby that are new, previously played, and recommended:** In House of Fun, the three lobby cards are often organized with a new machine, a previously-played machine, and a recommended machine based on player behavior (image 4).

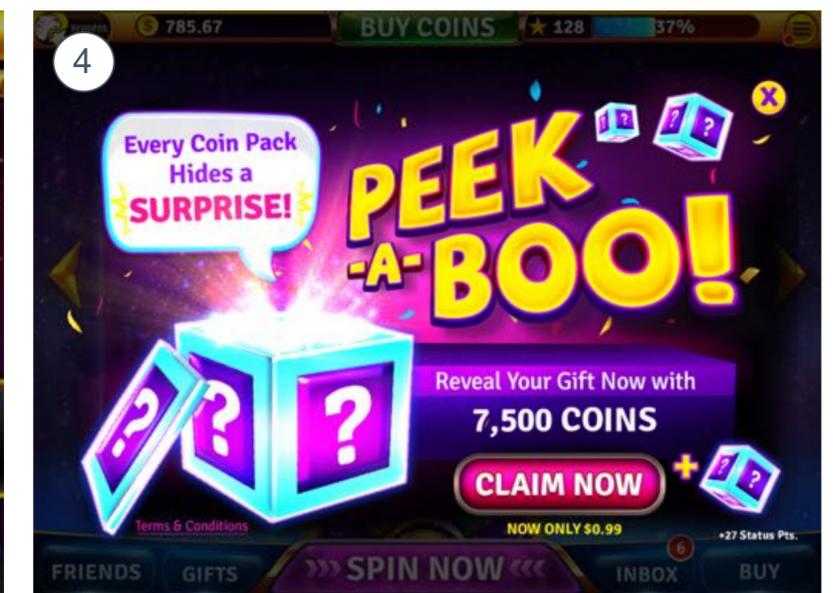


LIVE OPS

NEW LIVE OPS

Award event winners with naming rights. Determine tomorrow's leveling payout based on today's play. Add a mystery gift post-purchase for a simple implementation of surprise bonuses

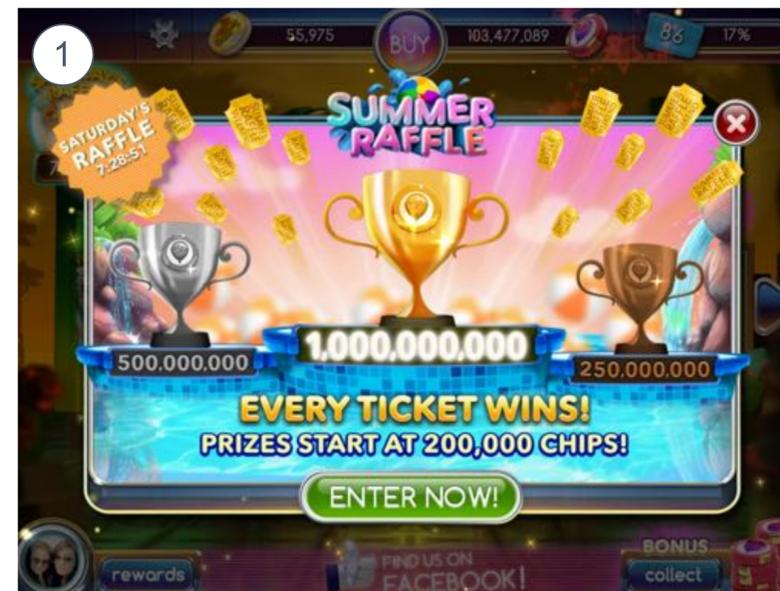
- **Award winners with naming rights to public rooms:** In WSOP's *Champions Table* event, the top winners are awarded the jackpot prize and naming rights for the next *Champions Table*. Events are announced on Facebook with top winners displayed in the app (images 1 & 2).
- **Base tomorrow's awards on today's level up play:** In Caesars Slots *Stairway to Riches*, players' award amounts for the next day depend on how many times they level up the present day. Prizes include express bonus collections, triple XP, double gifts, and additional ten level rewards (image 3).
- **Incorporate an unknown gift into coin packages:** In House of Fun, the *Peek-a-Boo* coin feature adds a surprise gift to coin packs (image 4). This is marketed prior to purchase unlike DoubleU Casino's *Surprise Bonus* feature highlighted in New Innovations, which is an unexpected bonus.



TIERED RAFFLES

Increase raffle participation by making every participant a winner. Maintain revenue per transaction with ticket levels

- In POP! Slots' *Summer Raffle* event, three prize levels are displayed with a timer and a message that 'Every Ticket Wins' (image 1).
- Purchases made in the coin store include *Bronze*, *Silver*, and *Gold* raffle tickets. Ticket level depends on purchase amount (image 2).
- The *My Tickets* screen displays the number of tickets held for each prize level (image 3).
- When the raffle concludes, players are notified of the total amount won (image 4).

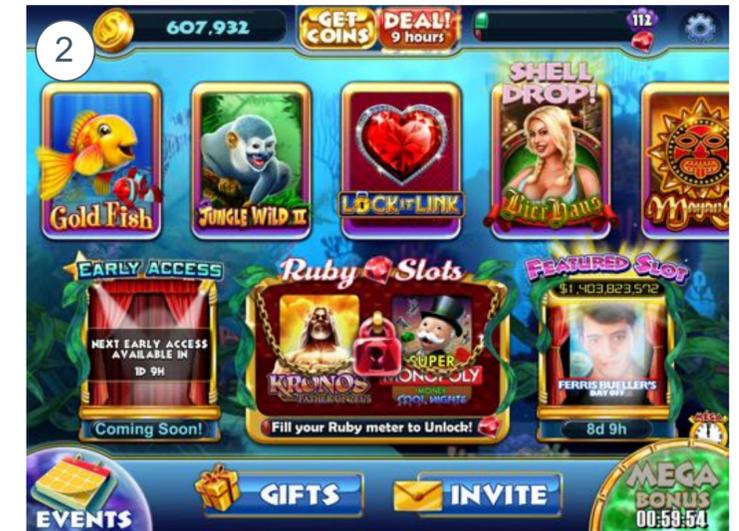


MARKET WATCH

6/15/17 – 7/14/17

SLOTS APPS: TOP GROSSING 1 - 9

App	Notable Features Released
DoubleDown Casino	<ul style="list-style-type: none"> • <i>Chip Jar</i> piggy bank feature added that collects chips during play (image 1)
House of Fun	<ul style="list-style-type: none"> • <i>Special Challenge</i> offers a purchase incentive with a timed challenge to level up when out of chips (see Retention Polish for details) • <i>Peek-a-Boo</i> is a surprise bonus added to every coin purchase (see Live Ops for details)
Slotomania	<ul style="list-style-type: none"> • <i>2 Hrs Payback</i> and <i>Payback Deluxe</i> activate a payback on qualifying bets (see New Innovations for details) • <i>Coin Tree</i> feature introduced with increasing daily coin bonuses (see Retention Polish for details) • New <i>SlotoQuest</i> featuring a ten island staged adventure with coins, boosts, and <i>Slotocard</i> rewards
Gold Fish	<ul style="list-style-type: none"> • New user interface with added lobby events calendar (image 2)
Caesars Slots	<ul style="list-style-type: none"> • Players earn stars by completing challenges in the <i>Liberty Challenge</i> (image 3 and see following pages for details) • Personalized 2017 <i>Midyear Legacy Video</i> released • Multiple coupons delivered to the inbox with <i>Sunset Coupons</i>
DoubleU Casino	<ul style="list-style-type: none"> • Option to join multiple clubs removed from the <i>Winners Club</i> • Club star challenge meter added to machines



SLOTS APPS: TOP GROSSING 10 - 45

App	Notable Features Released
Hit it Rich	<ul style="list-style-type: none"> New <i>VIP Room</i> and <i>High Voltage Zone Room</i> introduced with a collection mechanic (see following pages for details) The <i>Price is Right</i> themed wheel that determines the coin package cost and discount (image 1 and see <i>Retention Polish</i> for details)
Quick Hit Slots	<ul style="list-style-type: none"> Players spin-to-collect 4th of July <i>Fireworks Frenzy</i> event for coin and boost prizes (image 2)
Scatter Slots	<ul style="list-style-type: none"> <i>Scatter Diary</i> feature includes daily missions with a fill meter that awards prizes (see following pages for details)
GSN Casino	<ul style="list-style-type: none"> <i>Summer Solstice Challenge</i> rewards players based on days played
POP! Slots	<ul style="list-style-type: none"> <i>Summer Raffle</i> held with ticket levels based on coin package purchased (see <i>Live Ops</i> for details) <i>Independence Day</i> spin to collect event with pick'em for jackpot award <i>Caribbean Challenge</i> was added to reward real world prizes
Black Diamond Slots	<ul style="list-style-type: none"> <i>Prize Chest</i> collection feature was released with spin-to-collect keys (image 3)



BINGO & POKER: TOP 10 GROSSING

App	Notable Features Released
Bingo Bash	<ul style="list-style-type: none"> • <i>VIP Rewards</i> added based on a week of activity (image 1)
Bingo Holiday	<ul style="list-style-type: none"> • <i>Elite: 7 Day Bonus</i> purchase increases daily rewards • New power up: <i>Flash Cooling</i> (image 2)
World Series of Poker	<ul style="list-style-type: none"> • Missions icon added to lobby featuring various daily missions, fill bar, and timer • <i>Champions Table</i> events award winners with naming rights of the next event (see Live Ops for details)
Pokerist	<ul style="list-style-type: none"> • <i>Baccarat</i> added to the game lineup with 'View' and 'Play' table button options (image 3)



CAESARS SLOTS

Caesars Slots released *Liberty Challenge* missions that award stars that earn medals upon completion

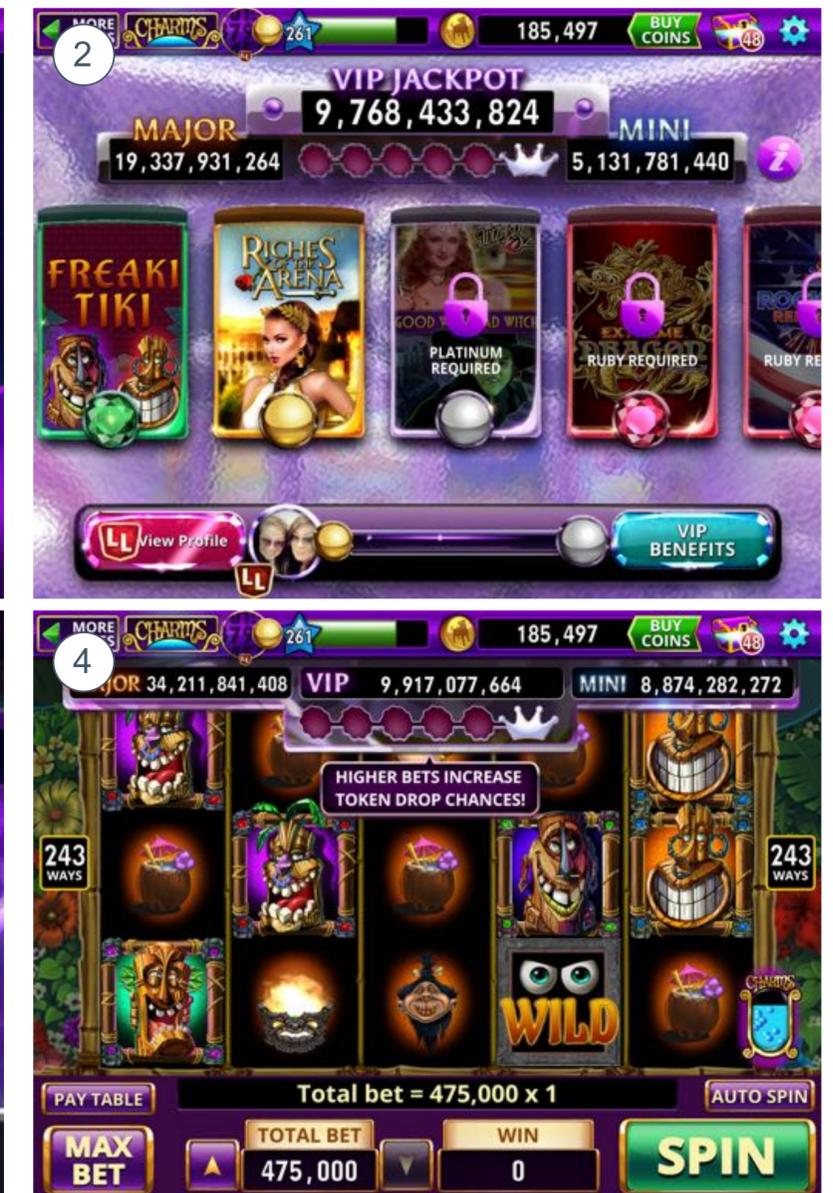
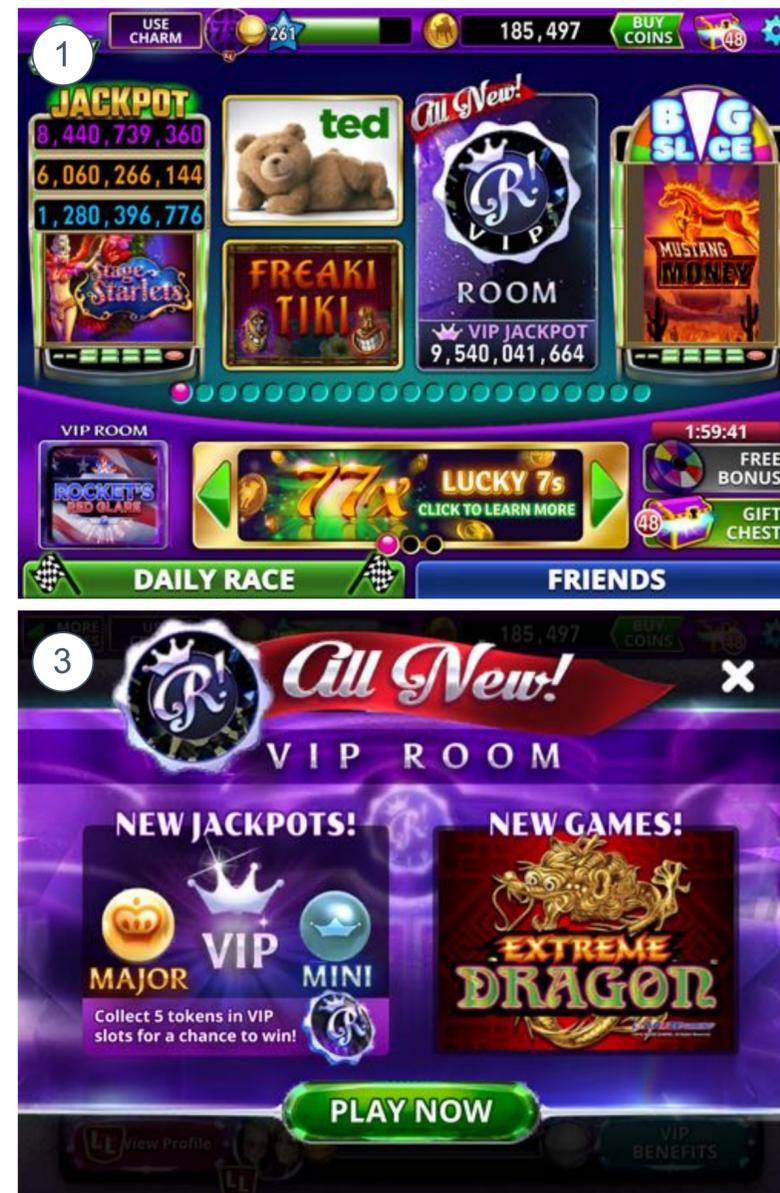
- Caesars Slots' *Liberty Challenge* contains seven missions.
- Completing all missions earns a medal and \$19.18 worth of coins (image 1).
- Finishing any active mission in the *Challenge Center* earns stars for the *Liberty Challenge* (image 2).
- Completing a *Liberty Challenge* mission prompts a notification (image 3).
- At the completion of the challenge, a dialogue displays the total missions completed (image 4).



HIT IT RICH

Hit it Rich released a new VIP Room with a collection mechanic that fills during play and awards a chance to win a progressive jackpot

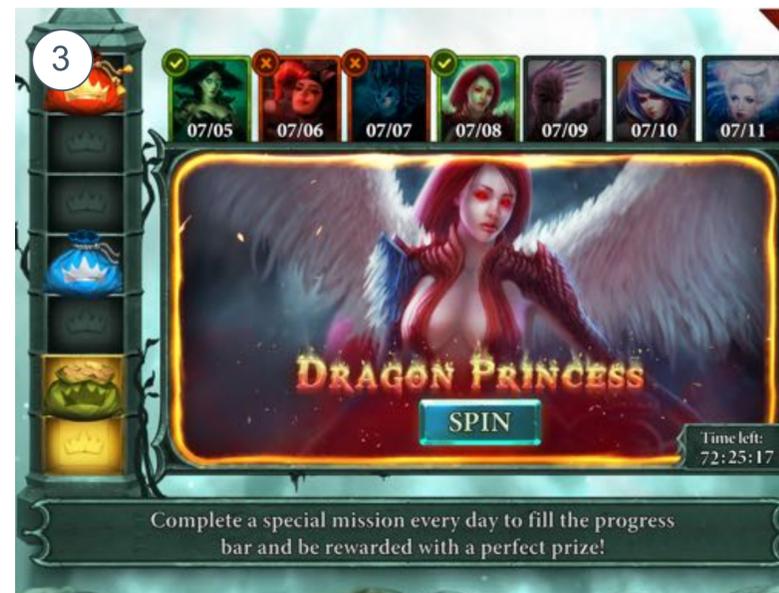
- Hit it Rich's new VIP Room is announced in the main lobby and displays a progressive jackpot (image 1).
- The VIP Room includes a collection mechanic, three progressive jackpots, and additional machines (image 2).
- Clicking the information icon opens a dialogue with the new collection feature and jackpots (image 3).
- Tokens are earned during play. Higher bets increase the odds of a token landing. Filling the meter awards players a chance to win the progressives (image 4).



SCATTER SLOTS

Scatter Slots released a daily event calendar with a progress bar that fills based on completed missions

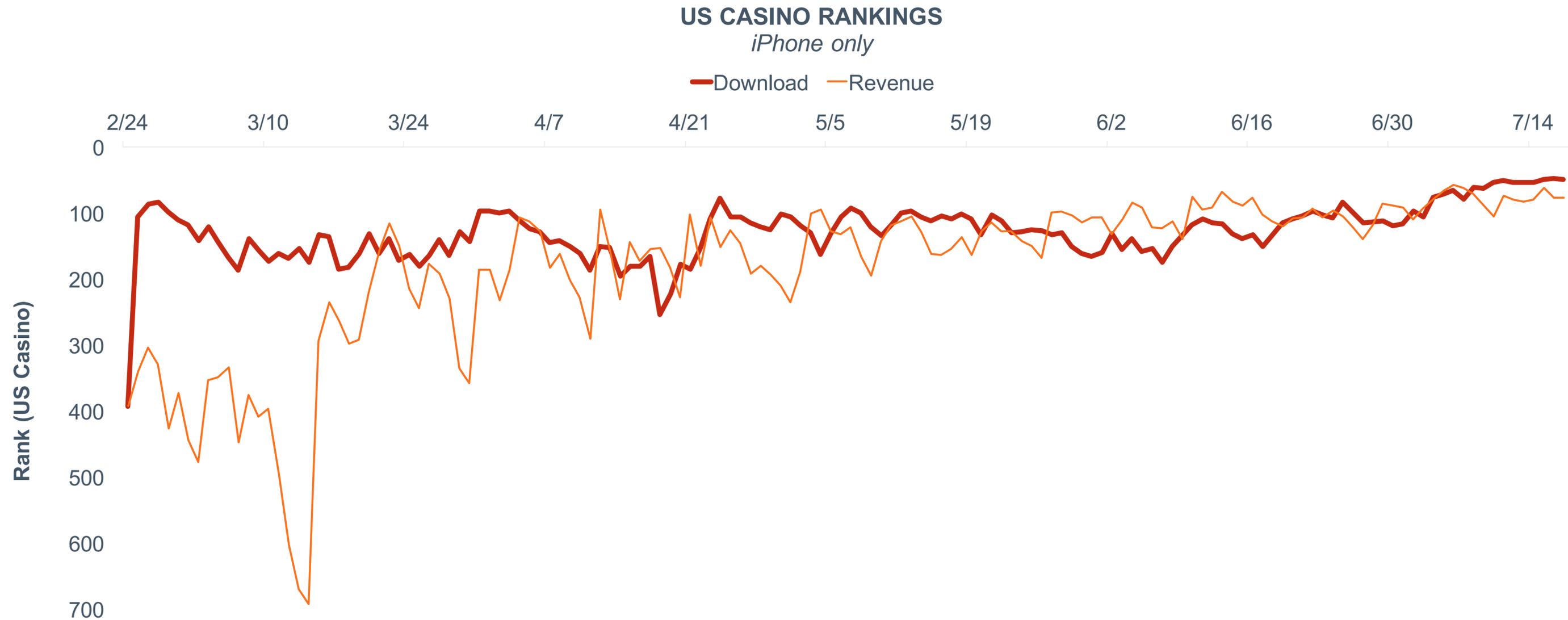
- Scatter Slots' *Scatter Diary* is a daily log-in event to complete missions. In specific machines, this feature allows players to collect prize bags (image 1).
- The *Scatter Diary* mission is revealed at machine-entry with a progress bar below the reels (image 2).
- For players to fill the daily meter, they must complete the mission before the daily timer runs out (image 3).
- There are three possible prize bags that may be won by filling the meter (image 4).



ECONOMY TEARDOWN: SCATTER HOLD'EM POKER

RANKING TRENDS

Scatter HoldEm Poker began climbing the top grossing charts in 2017 and is on track to break into the top 30 iPhone US Casino category

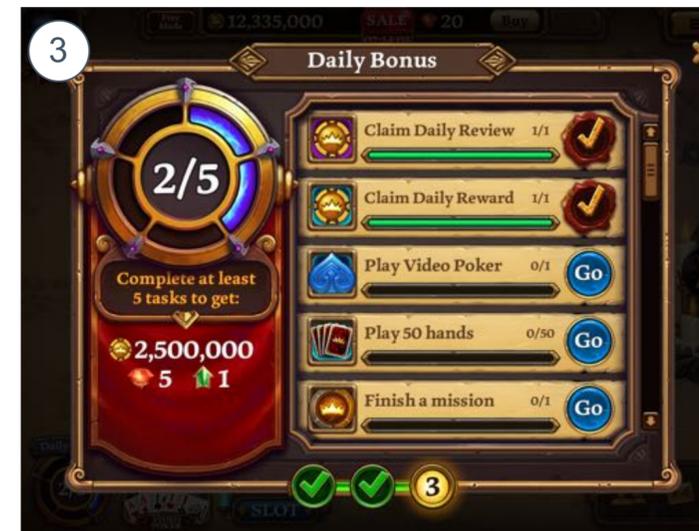


Source: Sensor Tower Store Intelligence

FEATURES

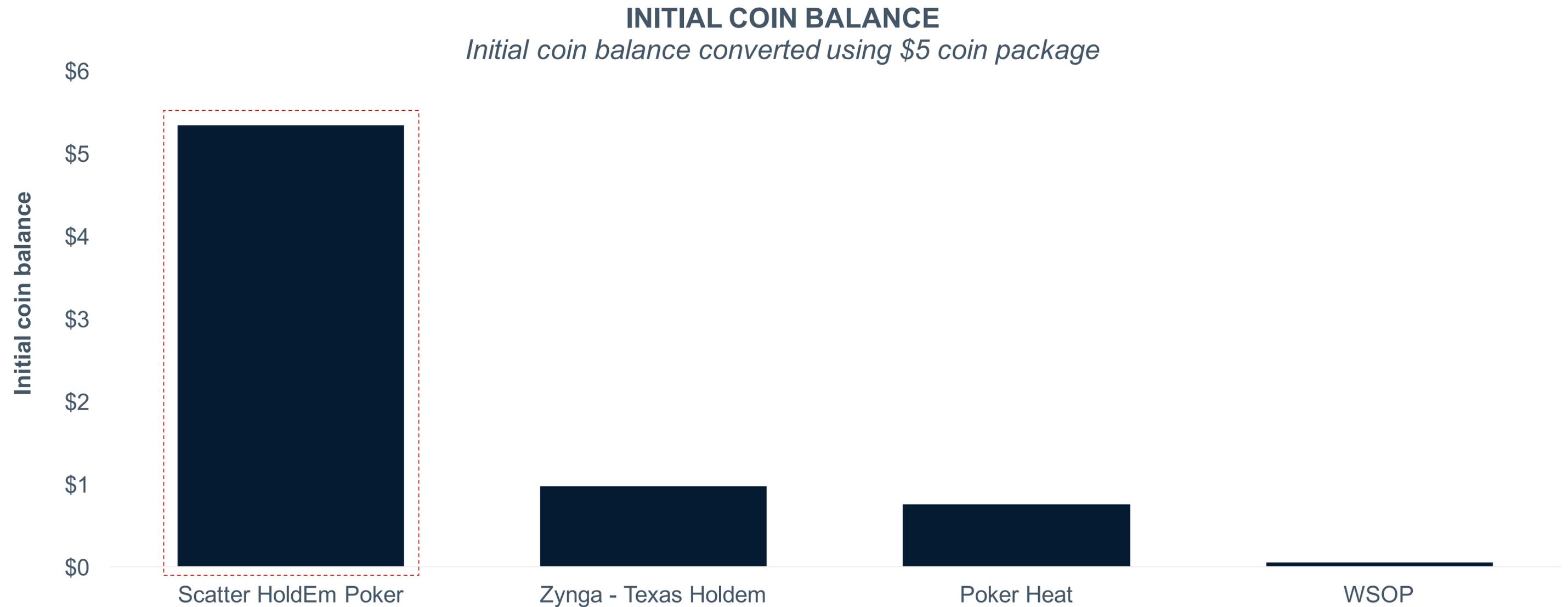
Scatter HoldEm Poker focuses on retention with three daily bonuses. Exclusive features and rewards are reserved for VIP players

- Scatter HoldEm Poker features a challenge-based map system. Missions must be completed to advance (image 1).
- The current mission is visible in the bottom left corner of the screen, with a fill meter displaying progress (image 2).
- There are three possible daily bonuses: *Daily Review*, *Daily Reward*, and *Daily Bonus*. The *Daily Bonus* must be earned by completing five of seven tasks. Tasks range from claiming bonuses to making a purchase (image 3).
- The hourly bonus is the total amount won in ten hands of video poker. Payouts for the video poker payable may be upgraded (image 4).
- Type-chat is available to VIP players only. During table play, pre-set chat phrases may be used (image 5).
- The *VIP Status System* is comprised of seven levels from *Bronze* to *King*. Players earn points to gain the next status level through play and store purchases. Depending on a player's level, VIP benefits increase chip and status points on store purchases. Exclusive VIP support is given only to the top three VIP levels (image 6).



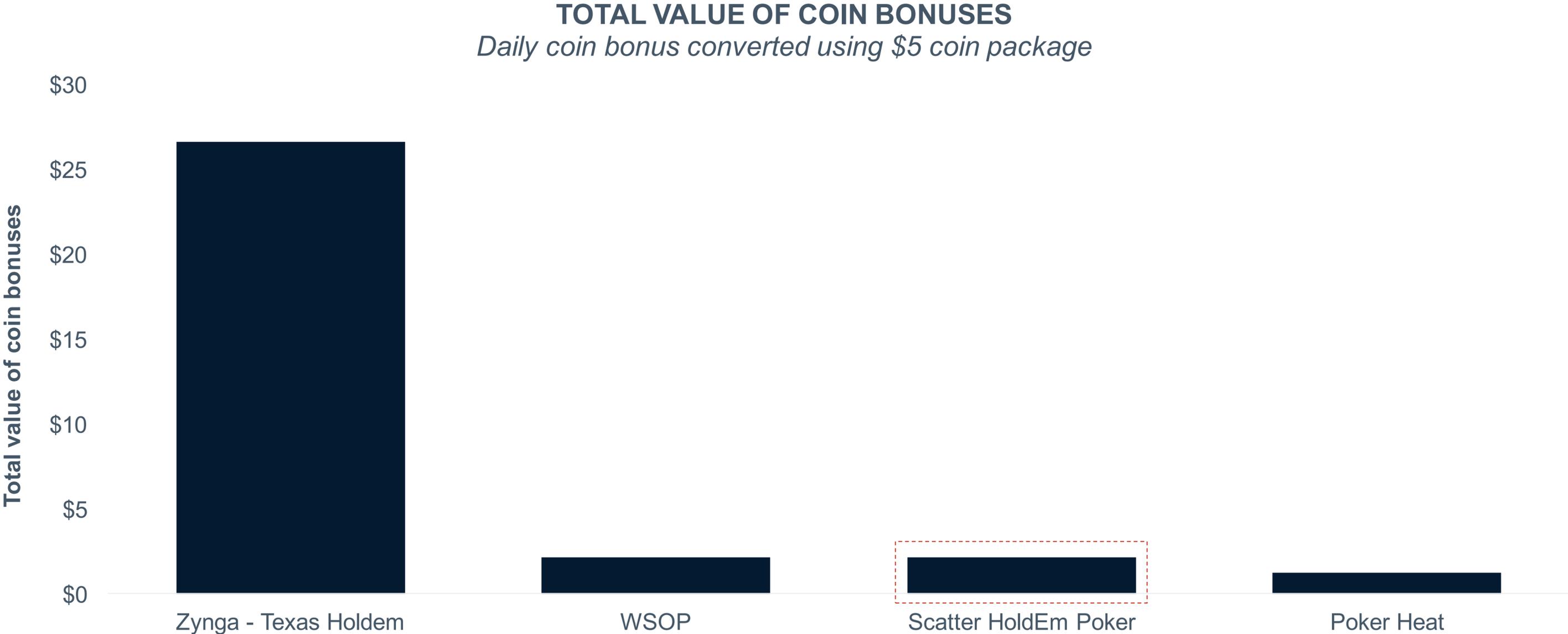
INITIAL COIN BALANCE

Scatter HoldEm Poker gives a massive amount, \$5.33 worth of coins, to new players compared to top grossing poker apps



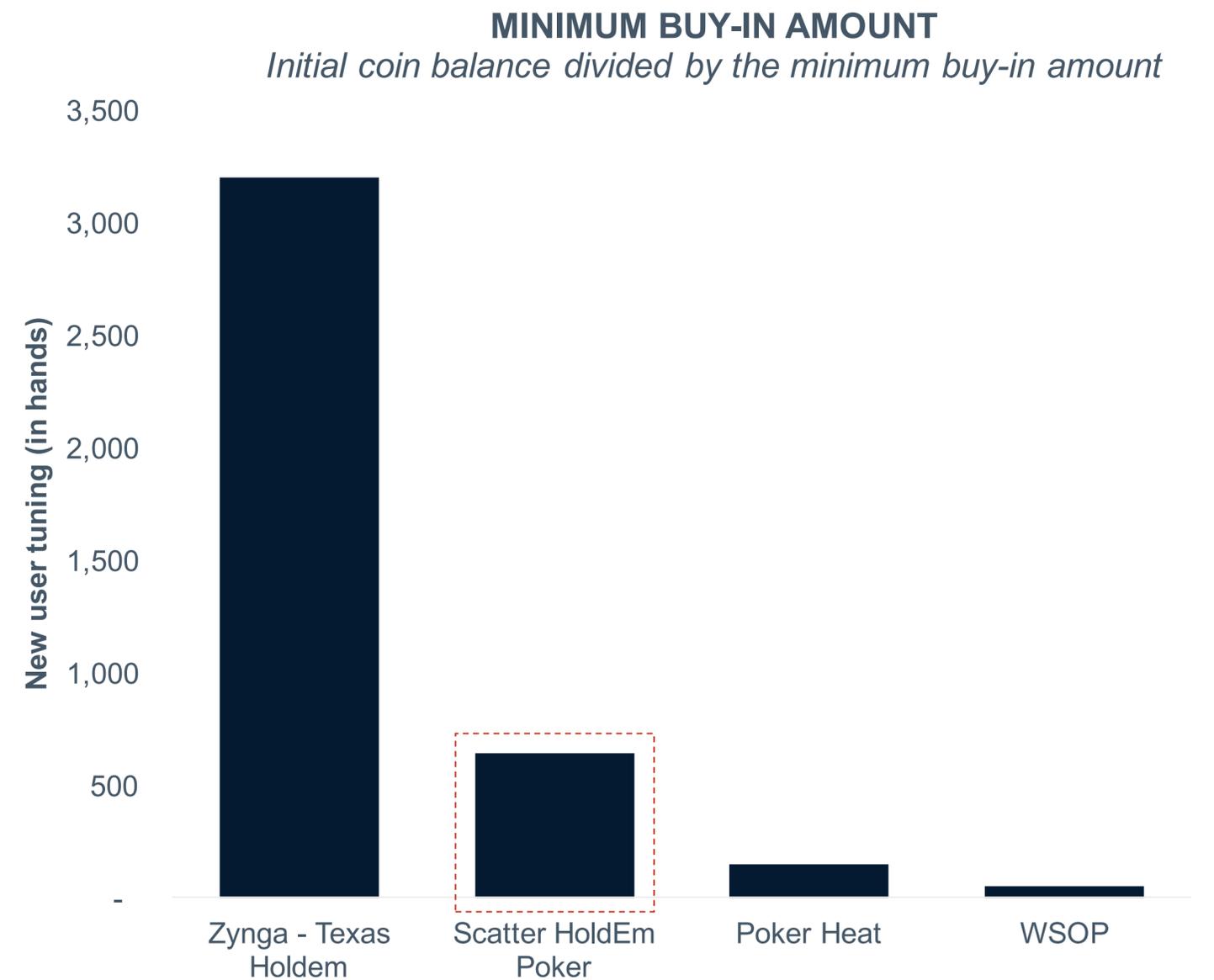
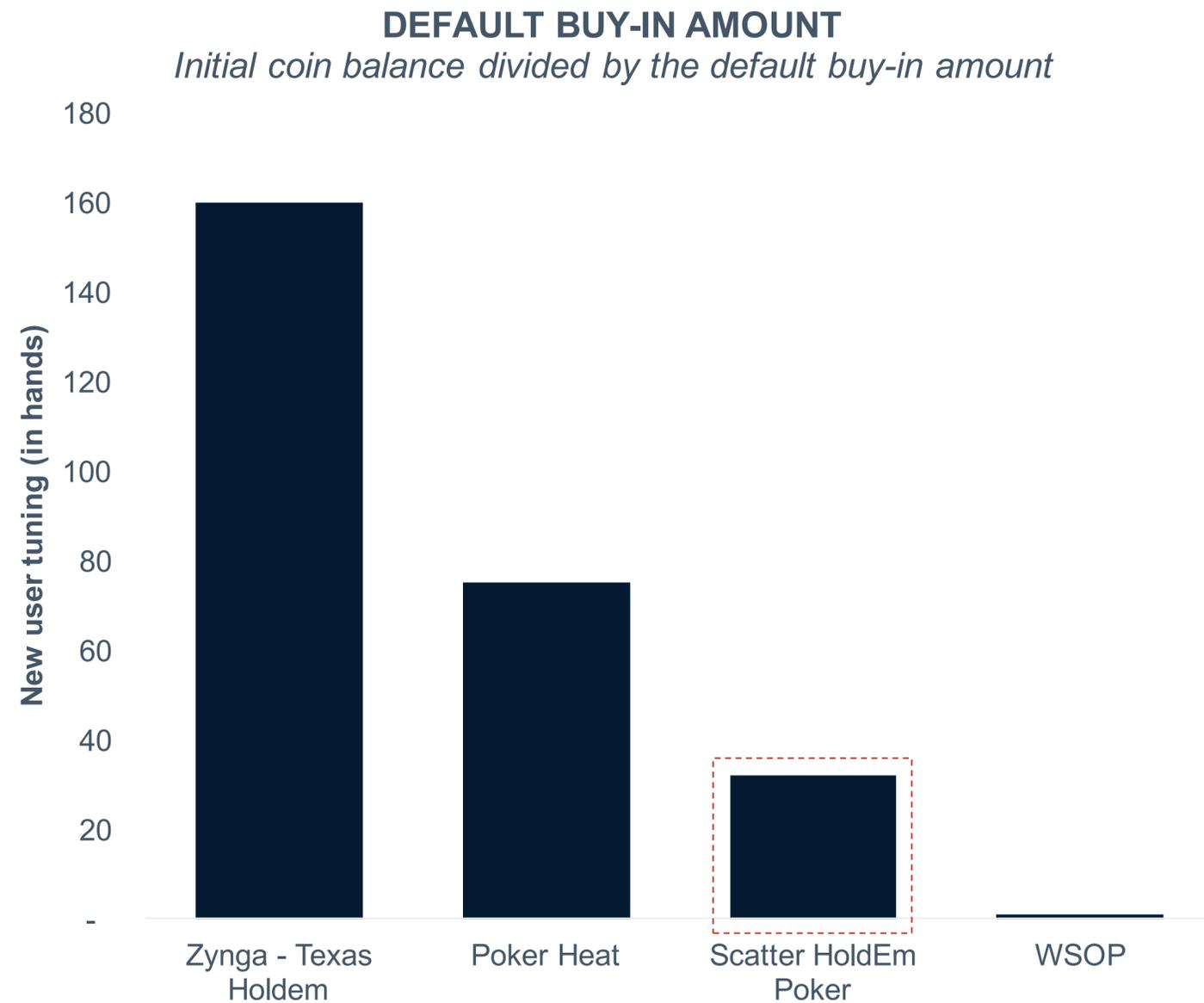
TOTAL VALUE OF COIN BONUSES

Scatter HoldEm Poker provides players with a modest amount of free coins daily. There are three bonuses paid out with a total value of \$2.12 daily



NEW USER TUNING

Scatter HoldEm Poker's new user buy-in tuning is modest: 32x the default buy-in amount and 640x the minimum buy-in amount. New users receive an average amount of play time



COINS-TO-DOLLAR RATIO

Scatter HoldEm Poker has the highest coins-to-dollar ratio relative to top grossing poker apps: \$3.0M 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 apps

Market research

- Each app is reviewed weekly for updates, regardless of whether the app 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 Sensor Tower Store Intelligence

App information

- App information comes from a deep-dive analysis of each app.
- In the Economy Teardown and economy-related slides, the coin value is determined by converting coins into money using \$5 worth of non-sale purchasable coins in each app. 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 apps 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.

If you know the enemy and know yourself you need not fear the results of a hundred battles

– Sun Tzu, *The Art of War*

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