



LIQUID AND GRIT

Social Casino Report

Competitive research and actionable product recommendations

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OCTOBER

2017

INTRODUCTION




“Deciding what not to do is as important as deciding what to do.”
- Steve Jobs

Dear Product Owner,

In this report, you will find a new section where we analyze features that have been removed from an app. Our first *Removed Feature* is a competitive VIP room from Jackpot Party.

In New Innovations, you now have *more* information—release dates, additional insights, and key takeaways—to help make your roadmap decisions.

Given the success of Chumba Casino, this month we examine SpinToWin, an iOS casino app awarding real world prizes using sweepstakes. Stay on top of these type of mechanics—and test some concepts in your apps—to attack and defend this new, powerful product offering.

As you read this report, click on the links to the Feature Database—noted with this  icon—for a full display of screenshots. Our Feature Database is continuously growing, allowing you to go deeper on any feature of interest. You need a Liquid and Grit login for access. Email info@liquidandgrit.com if you do not have an account.

Make informed decisions.



Brett Nowak
Editor-in-Chief

NEW INNOVATIONS


BONUS VAULTS

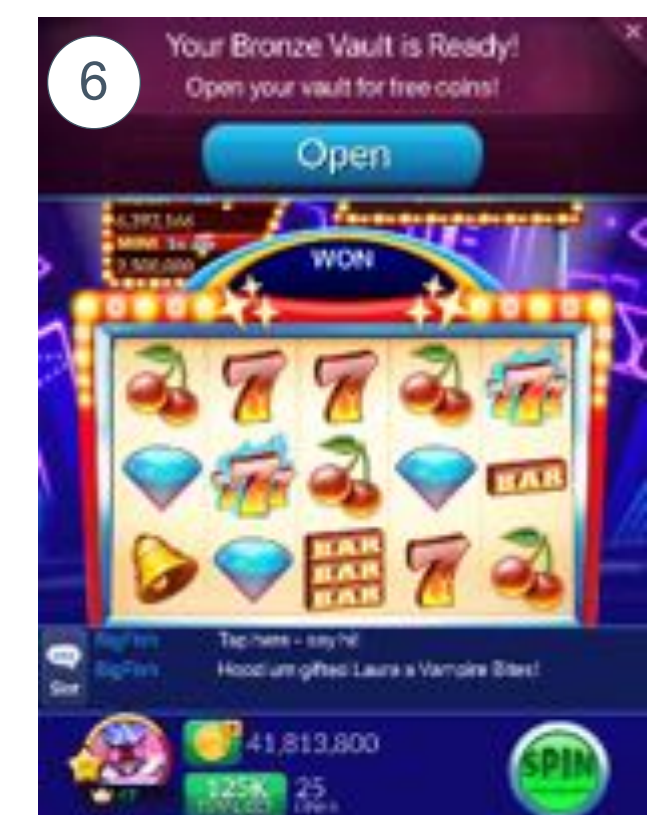
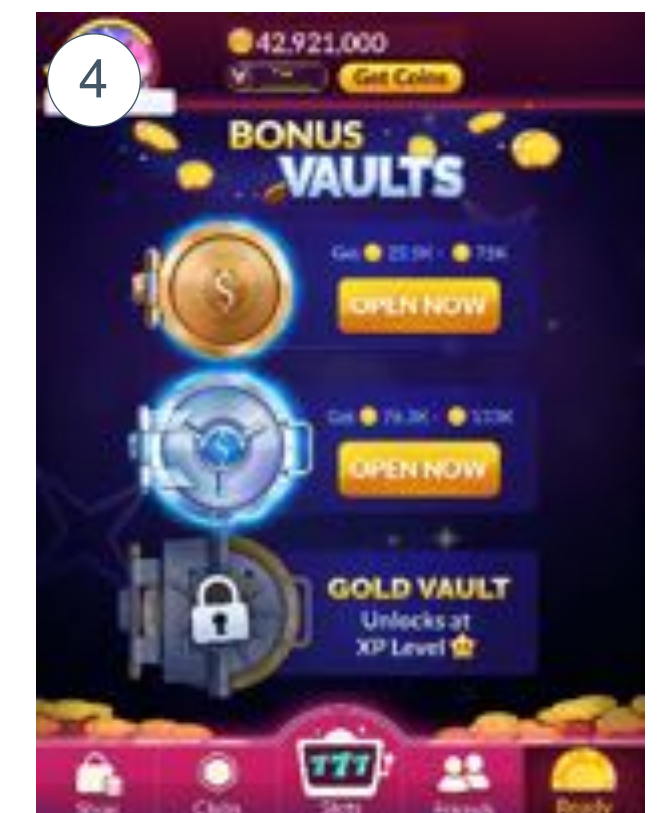
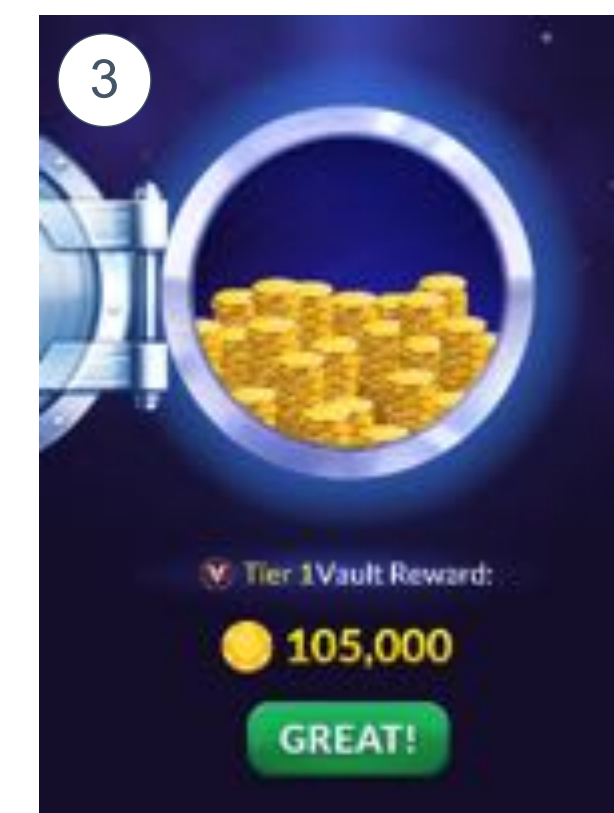
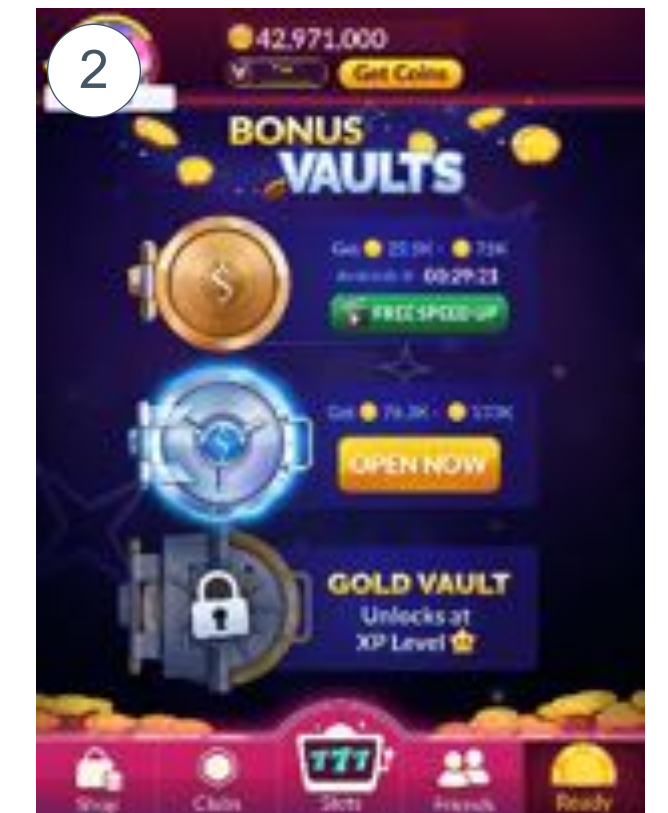
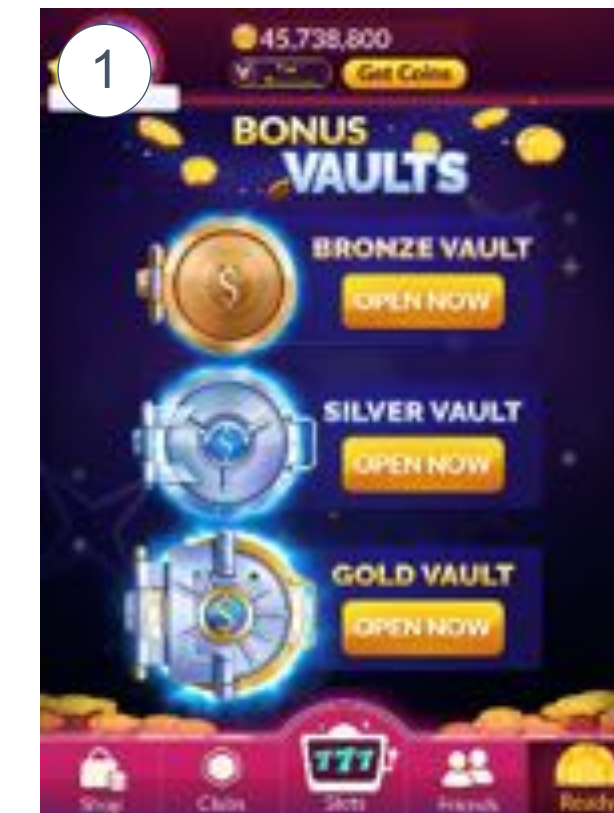
Jackpot Magic Slots released a retention bonus system (inspired by Clash Royale) that unlocks additional bonuses based on level, and increases prizes based on VIP tier

- Players must first click the READY icon to open the vault (image 1).
- The *Bronze Vault* is collectable every 30 minutes. A Watch-to-Earn speeds up this timer (image 2).
- The *Silver Vault* is available every 4 hours (image 3).
- The *Gold Vault* unlocks for players at level 15, and is available every 11 hours (images 4 & 5). The vault reward is determined by a player's VIP tier.
- A banner notice appears during machine play when a vault is ready to be collected (image 6).

- **Release date:** 10/6/17
- **Additional insights:** Jackpot Magic Slots has been the #1 downloaded app since 10/11/17

KEY TAKEAWAYS

- Investments in bonus systems are **cheap to implement** and have a **large potential impact** due to percentage of player interaction
- Like this feature's implementation, **keep the design simple** and focus on balance
- **Add logic** to adjust payout amount for payers
- **Click here for more images in the Feature Database** 




DEAL OR NO DEAL ON RETENTION BONUSES

GSN added a *Deal or No Deal* mechanic to the daily bonus to drive up retention

- This new bonus is given out every hour, replacing the previous one that was every 4 hours (image 1).
 - Players are presented with two bonus options. The *Instant Deal* displays the amount of coins instantly awarded, and the *Mystery Case* is unknown (image 2).
 - Choosing *Mystery Case* reveals the mystery award (image 3).
 - Once players collect the bonus, the lobby bonus icon displays a timer with a fill meter (image 4).
- **Release date:** 10/5/17
 - **Additional insights:** *Deal or No Deal* mechanics have recently become popular slots mechanics. See the October 2017 Slots Design Report for details

KEY TAKEAWAYS

- Continue to **integrate slots mechanics into meta-features**: 16% of the Featured App's slots machines in September were released with a *Deal or No Deal* mechanic
- **Click here for more images in the Feature Database** 



QUICK HITS

Add a simple *Tap* game during the loading screen to decrease dropoff. Reward lapsed players with locked machine play, *for a limited time*. Save bonus game progress to decrease negativity associated with app crashes

- **Entertain and reward players during the loading screen:** In Classic Slots, players are instructed to 'Tap' a chip that appears with the loading screen (images 1 & 2).
- **Add a mini slot machine for players during bingo room wait times:** In Bingo Blitz, a new mini stepper keeps players engaged while waiting for the bingo room to fill up (image 3).
- **Reward lapsed players with a special machine unlock for a limited time:** In Vegas Words Downtown Slots, a random machine is unlocked with a countdown timer (image 4).
- **Save incomplete bonus games and reward players upon re-entry:** When players in Vegas Words Downtown Slots re-enter the app after leaving mid-bonus game, they receive a mini-wheel to award a new bonus game (image 5).
- **Let players choose their experience:** In Jackpot Magic Slots, players may choose a *Normal Machine*, with a less social group, or a *Social Machine*, with a social group of players (image 6).

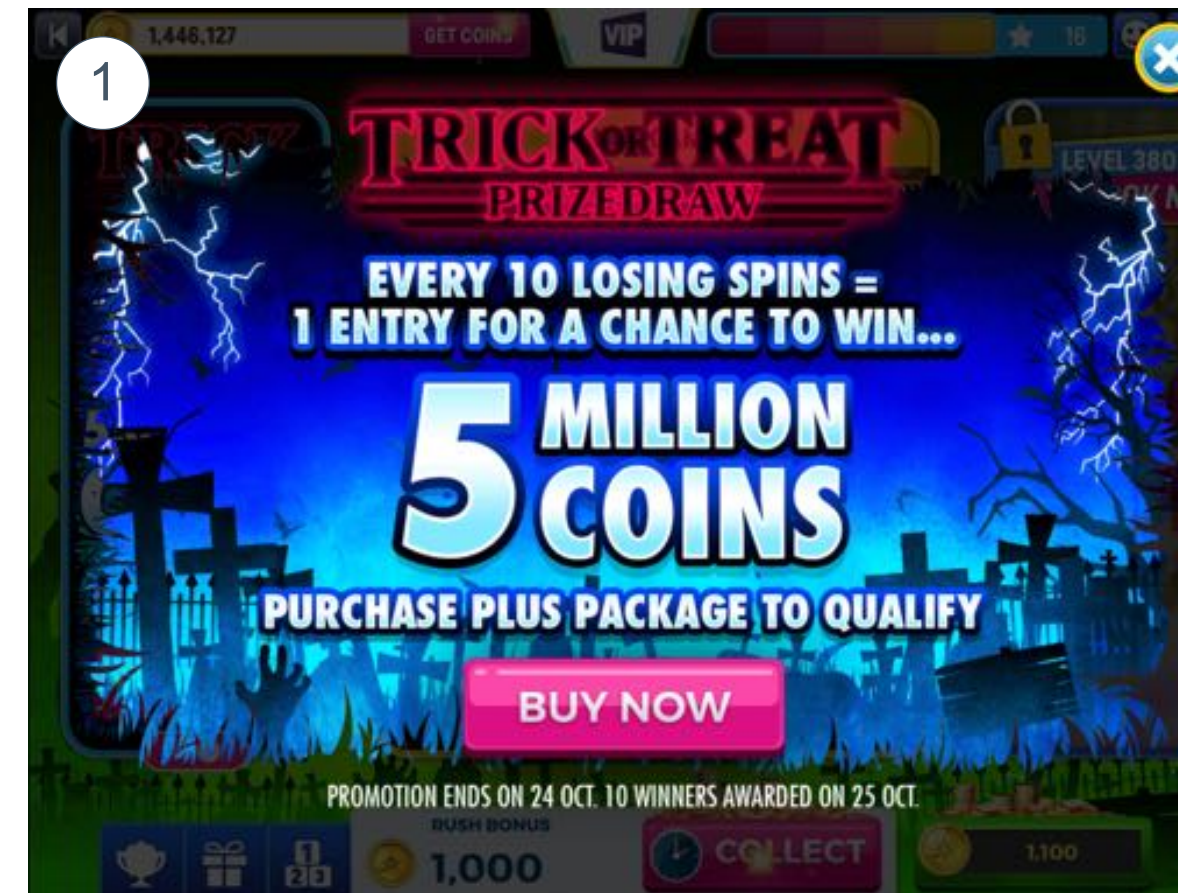


LIVE OPS

LIVE OPS


Reward players with non-winning spins after a purchase. Increase bet per spin with a visit to 'meet the team' award. Continue to explore community-based events

- **Reward players for losing:** In Jackpotjoy Slots' *Trick or Treat Prizedraw*, players are rewarded for losing spins after purchasing a *Plus* package (image 1).
- **Motivate higher bets with 'meet the team' prizes:** In myKONAMI Slots, players enter a *Studio Tour* sweepstakes by completing five spins with a certain size bet. The sweepstakes winner will receive a two-night stay, air & food credits, and an exclusive tour of the KONAMI studios (image 2).
- **Increase retention by combining a community event with a week long sweepstakes:** Hit it Rich's *Birthday Bash* is a community event that includes a week long sweepstakes. During the event, hitting a big win casts votes and enters players into a daily sweepstakes draw. Hitting a big wins all seven days earns entry into a *Mega Jackpot* draw (image 3).
- **Continue to explore community rewards:** In Hot Shot Casino's *Sail The Ocean Blue* event, a daily community goal is displayed on a map each day before the release of the next daily challenge. Scientific Games' apps continue to release community-based events (image 4).



TEAM EVENTS

Wizard of Oz released a 16-person team competition, *Follow The Yellow Brick Road*. Teams spin to win randomly awarded bricks

- Players are randomly placed in teams. Higher bets increase the frequency of bricks landing (image 1).
- Clicking the fill meter displays information on individual player and team progress (image 2).
- Players may hide their name from the leaderboard; a great feature for whales (image 3).
- Players are notified when a challenge has been completed...with an option to send gifts to all teammates (image 4).
- After each completed challenge, a *Bonus Reward* is given to the top contributor (image 5).
- Players are notified at challenge completion of a new team goal and prize pool amount. Both number of bricks to be collected and prize awards are increased (image 6).
- **Release date:** 10/14/17
- **Additional insights:** See the Puzzle category's Wizard of Oz Magic Match's feature Team Battle as an example of an opt-in 10 v 10 team feature 

KEY TAKEAWAYS

- Continue to develop more intimate group collaboration & competition
- **Click here for more images in the Feature Database** 



REMOVED FEATURES

HIGH ROLLER ROOMS

Jackpot Party Casino removed the competitive VIP feature, *High Roller Colosseum*, previously released in May, and only open to players level 100 and above


Current feature removal messaging:

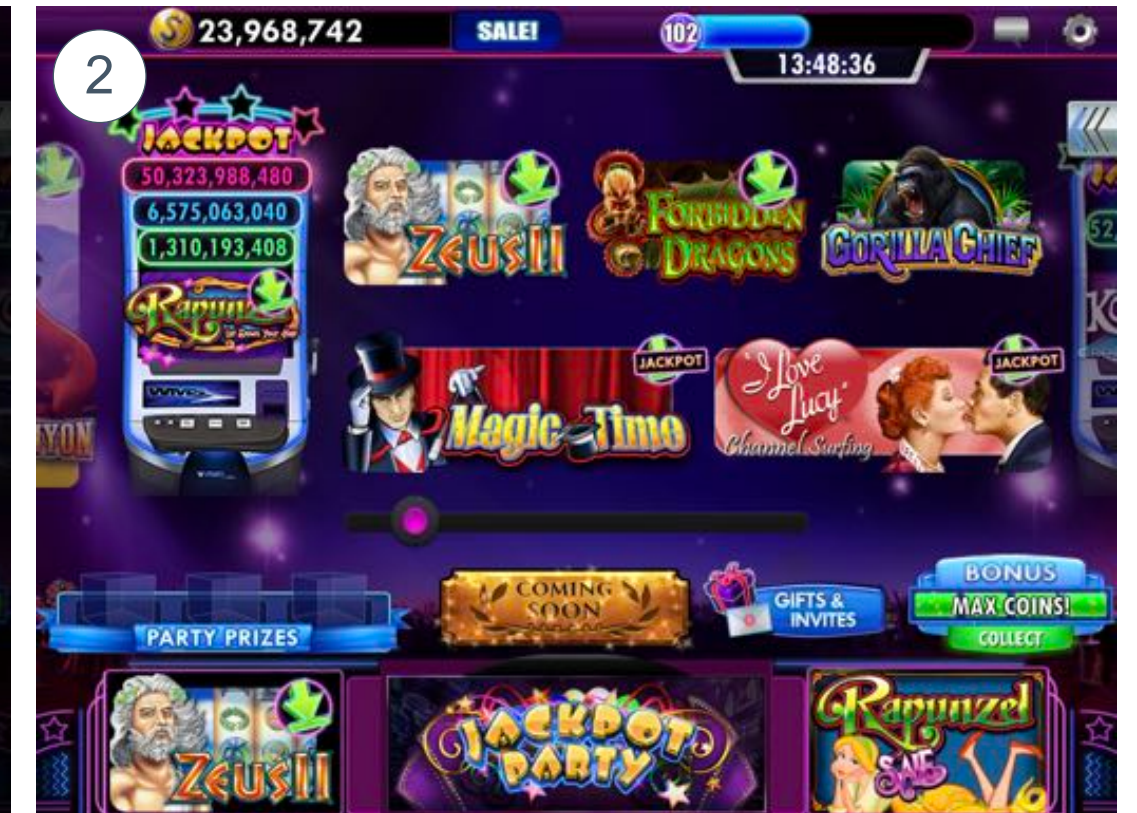
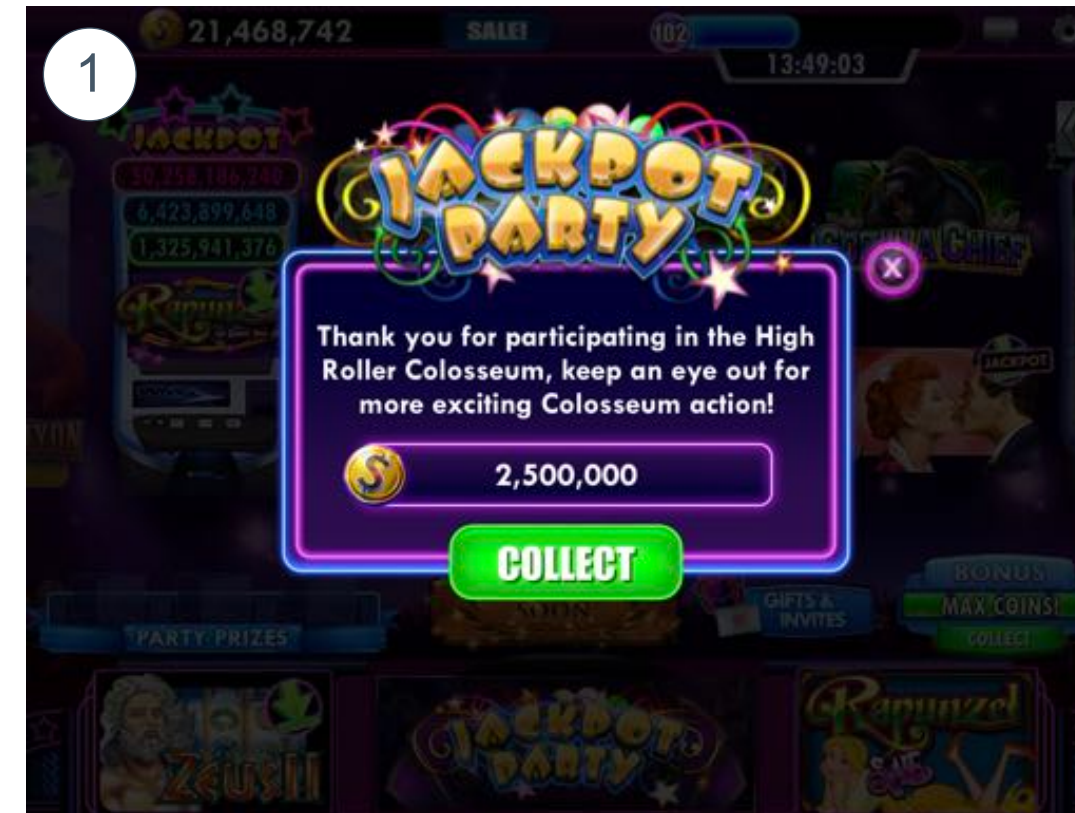
- Players who participated in the *High Roller Colosseum* are presented with a dialogue and coin award on entry (image 1).
- The lobby icon that once held the *High Roller Colosseum*, now displays 'Coming Soon' (image 2).

Old feature details:

- The original feature was open to players level 100 and up (image 3).
- Each machine displayed a machine-specific leaderboard, timer, and 'Win' challenge (image 4).
- Players completed high roller challenges to win medals (image 5).
- The total of all medals earned in battles were used for the rankings of the global leaderboard (image 6).

KEY TAKEAWAYS



- **Competitive** features can turn off slots players, even high level ones, so **make sure that the feature is *opt-in***, like tournaments
- Be careful not to showcase who spends a lot of money. Let players choose to **hide their names** on the leaderboard
- **Click here for more images in the Feature Database** 






MARKET WATCH

9/15/17 – 10/14/17







SLOTS: TOP GROSSING 1 – 15

App	Notable Changes	More Information
GSN Casino	<ul style="list-style-type: none">Improved daily bonus: <i>Deal or No Deal</i> retention bonus added	<ul style="list-style-type: none">New Innovations
Slotomania	<ul style="list-style-type: none">SlotoCards content: <i>3rd Album</i> released with new <i>Ace Card SlotoCard</i> that offers new rewards and collection features	<ul style="list-style-type: none"><u><i>Ace Card SlotoCard</i></u> 
Wizard of Oz	<ul style="list-style-type: none">Spin event: <i>Follow the Yellow Brick Road</i> team spin-to-collect event	<ul style="list-style-type: none">Live Ops
Jackpot Party	<ul style="list-style-type: none">VIP feature removed: <i>High Roller Colosseum</i> was removed	<ul style="list-style-type: none">Removed Features
Hit it Rich	<ul style="list-style-type: none">UI update: New icons and graphics	<ul style="list-style-type: none"><u><i>Lobby Polish</i></u> 

SLOTS: TOP GROSSING 16 – 45

App	Notable Changes	More Information
myKONAMI	<ul style="list-style-type: none">Studio Tour event: Raffle event for a chance to win a two night stay in Las Vegas and exclusive tour of the KONAMI studios	<ul style="list-style-type: none">Live Ops
POP! Slots	<ul style="list-style-type: none">Spin-to-collect event: <i>Diamond Chase</i> map event with four different <i>Savanna Diamond Wheels</i> to reach	<ul style="list-style-type: none">Diamond Chase 
Hot Shot Casino	<ul style="list-style-type: none">Community challenge event: Community challenge, <i>Sail The Ocean Blue</i>, features four days of daily challenges offering rewards each night	<ul style="list-style-type: none">Live Ops
myVEGAS	<ul style="list-style-type: none">Map challenge event: Map of challenges to complete for additional prizes	<ul style="list-style-type: none">Bounty Bonanza Bash 
Slots Era	<ul style="list-style-type: none">Retention bonus: Your <i>Lucky Day</i> offers free helium to fill balloons for prizes...or purchase a balloon which includes a collection boost and lottery tickets with a pick ‘em for a jackpot prize	<ul style="list-style-type: none">Lucky Day 
Jackpot Magic Slots	<ul style="list-style-type: none">Retention bonus mechanic: <i>Bonus Vaults</i> with three possible retention bonuses based on XP level and VIP tier	<ul style="list-style-type: none">New Innovations

BINGO & POKER: TOP 10 GROSSING

App	Notable Changes	More Information
Bingo Blitz	<ul style="list-style-type: none">• Fill meter based on daubs: New in-room <i>Daub-O-Meter</i>• Pre-game mini-game: New pre-bingo mini stepper mini-game	<ul style="list-style-type: none">• <u>Welsh Rabbit</u>• Quick Hits 
Bingo Lane	<ul style="list-style-type: none">• New UI	<ul style="list-style-type: none">• <u>New UI</u> 
Bingo Party	<ul style="list-style-type: none">• Progression mini-game: Rolling dice moves you around the board to collect prizes and event collection items	<ul style="list-style-type: none">• <u>Super Dice</u> 
WSOP	<ul style="list-style-type: none">• New poker game play: Hands played with only 9 through Ace	<ul style="list-style-type: none">• <u>Crown Hold ‘Em</u> 
Scatter HoldEm Poker	<ul style="list-style-type: none">• Direct messages: Players can chat and send emojis to other players instantly anywhere in the app	<ul style="list-style-type: none">• <u>Scatter Direct</u> 
Jackpot Poker by Poker Stars	<ul style="list-style-type: none">• New rooms: Cash game and tournament rooms added to lobby with XP boost and tournament trophies	<ul style="list-style-type: none">• <u>Fantasy Showdown</u> 

ECONOMY TEARDOWN: SpinToWin

SpinToWin

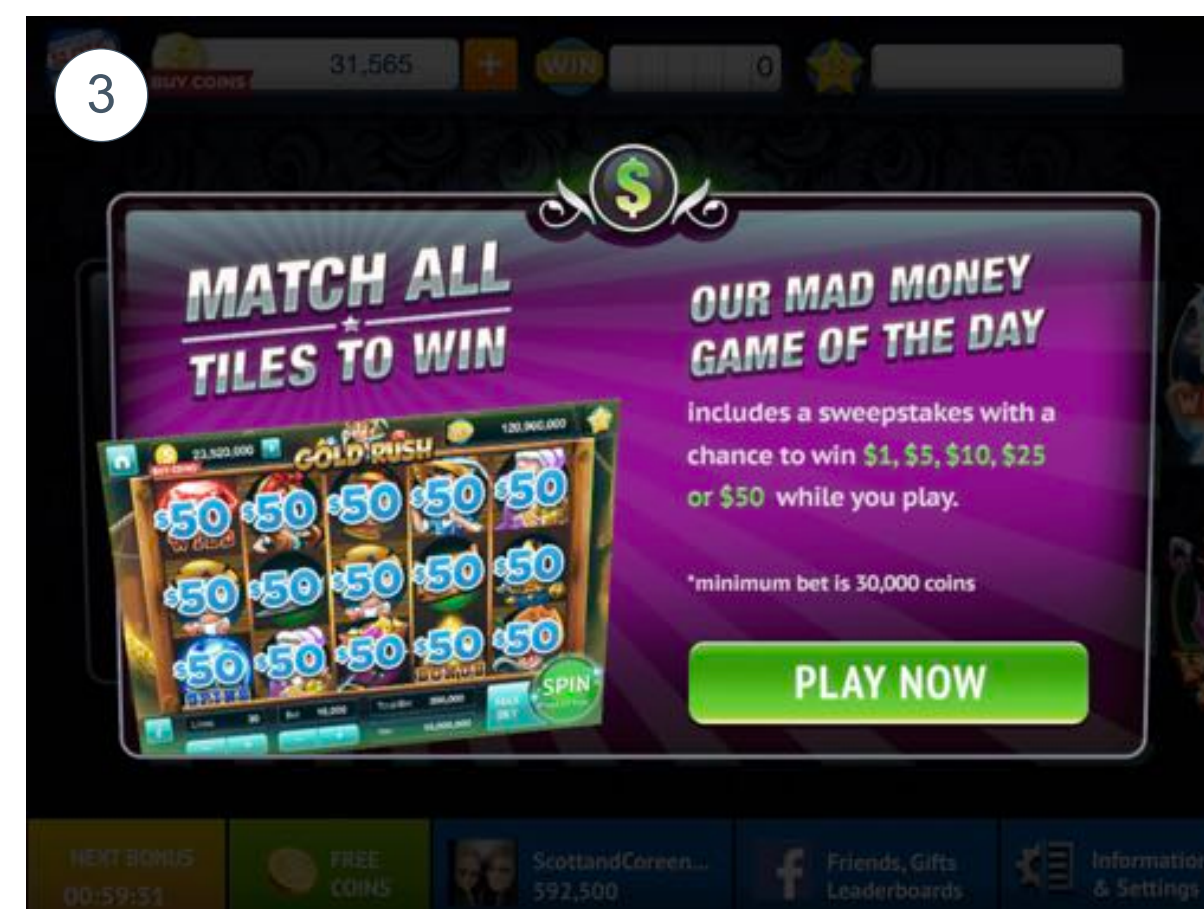
SpinToWin combines social and real world prizes with a sweepstakes mechanic that awards players tickets for each coin bet

- There is a sweepstakes ticket counter in the lobby (image 1).
- Players accumulate sweepstakes entries during play for daily and monthly prize draws. The number of entries earned is equal to the total bet amount for each spin (image 2).
- *Instant Sweepstakes* are offered in the *Mad Money Game of the Day* that requires a minimum bet of \$0.06 worth of coins.
- Matching full screen dollar overlays awards players with instant cash prizes (image 3).
- Winners of sweepstakes prizes are given the choice to claim prize awards through PayPal, or receive in-game coins.
- The top leaderboard winners from each day are showcased in the *Daily Power Players* machine. All machine symbols display the names and images of the top 13 players (image 4).

- **Release date:** 6/5/14
- **iOS download rank:** 45 and trending steadily upward
- **iOS grossing rank:** 100 and trending flat to slightly downward

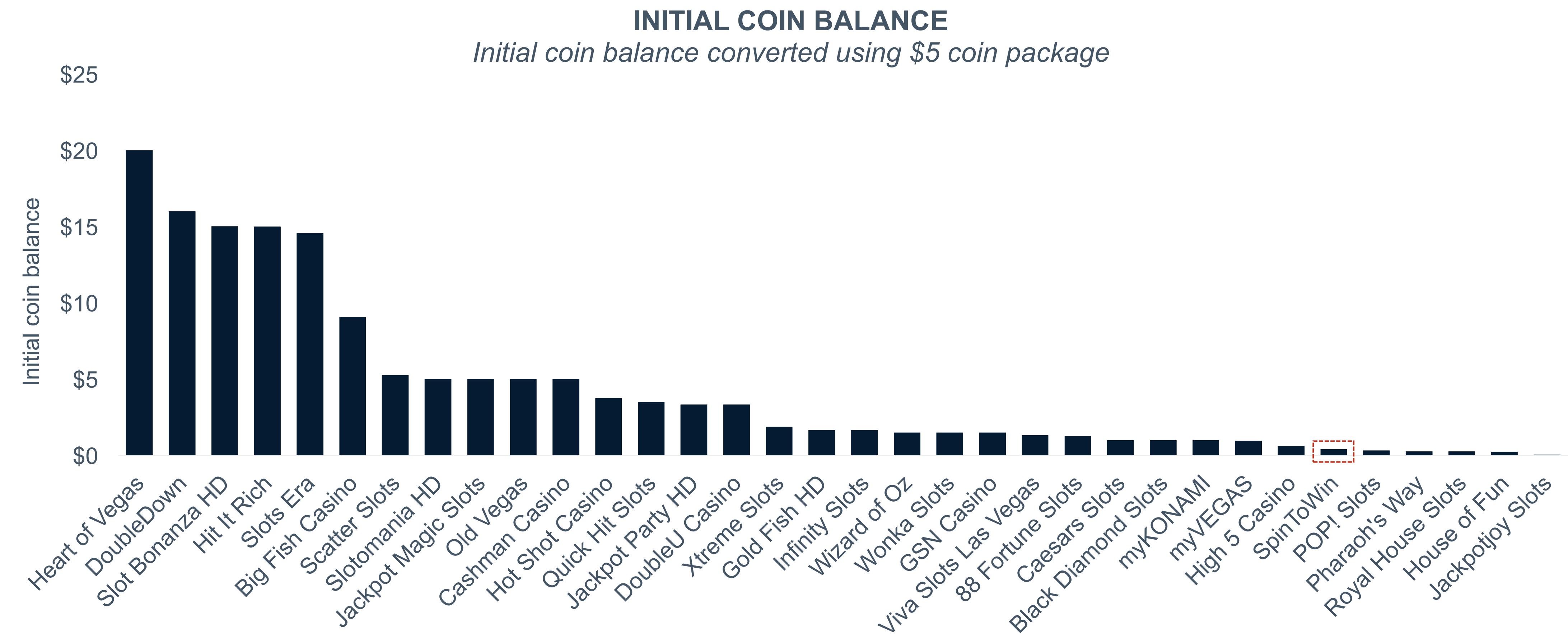
KEY TAKEAWAYS

- Players are **eager for more tangible, real world prizes** to justify their time playing and money spent
- Either attack or defend against this new product opportunity



INITIAL COIN BALANCE

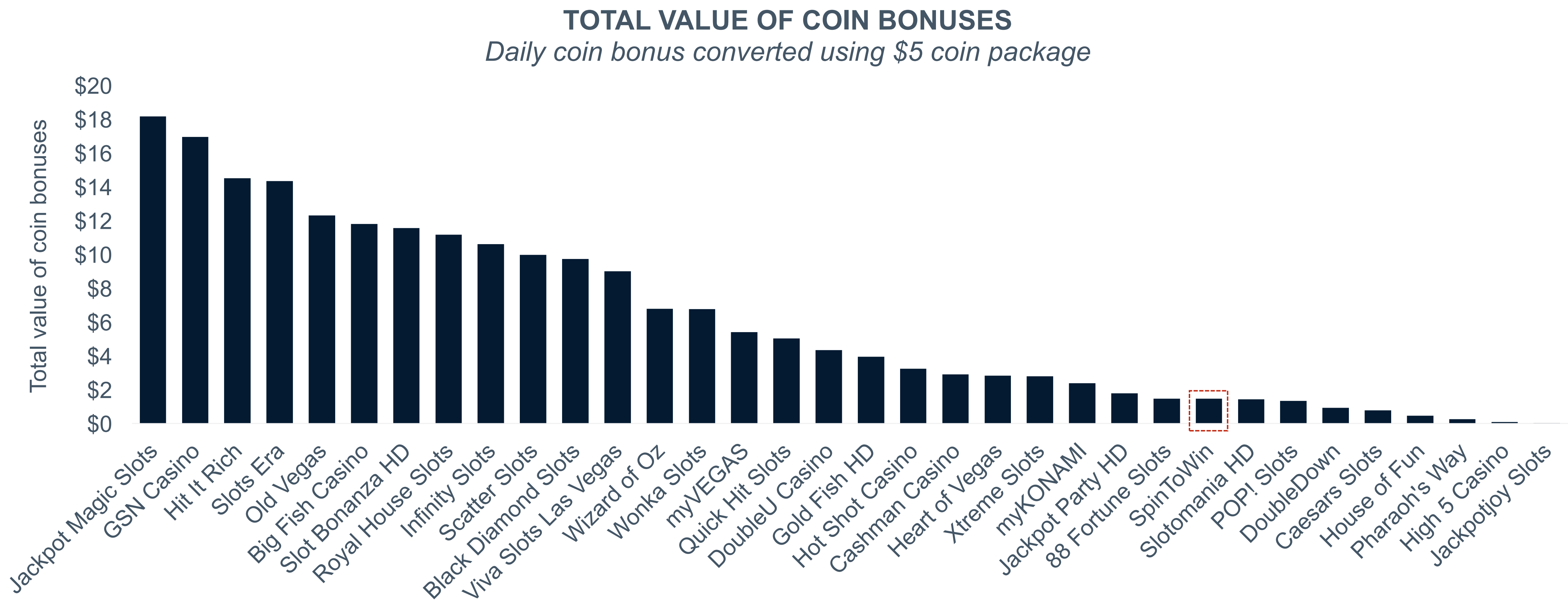
SpinToWin gives a small amount, \$0.40 worth of currency, to new players compared to top grossing slots apps



Huuuge Casino was removed from this graph as an outlier with \$85.99 worth of coins given to new players

TOTAL VALUE OF COIN BONUSES

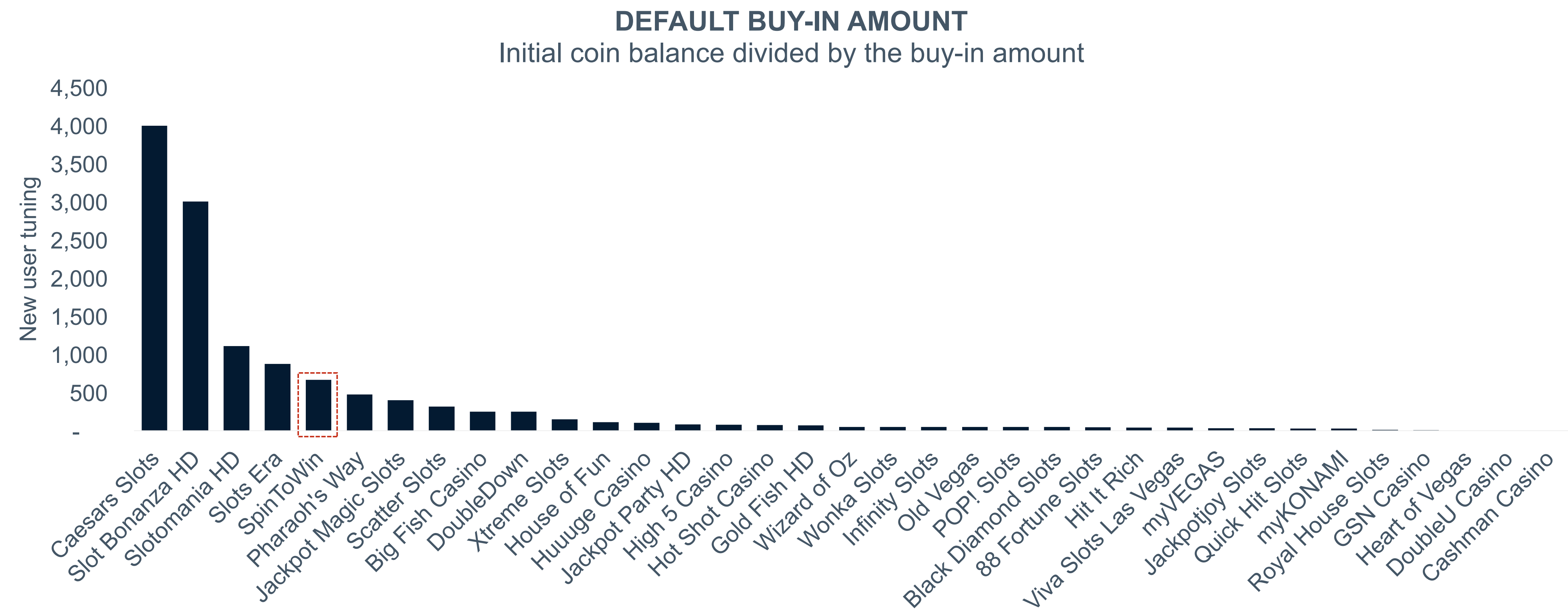
New players receive a small amount of free coins daily. There are three bonuses paid out with a total daily value of \$1.46. The largest contributor to players' wallets is the tertiary bonus that is paid out every hour with a potential value of \$0.96 daily



Huuuge Casino was removed from this graph as an outlier with \$89.87 worth of coins given out daily

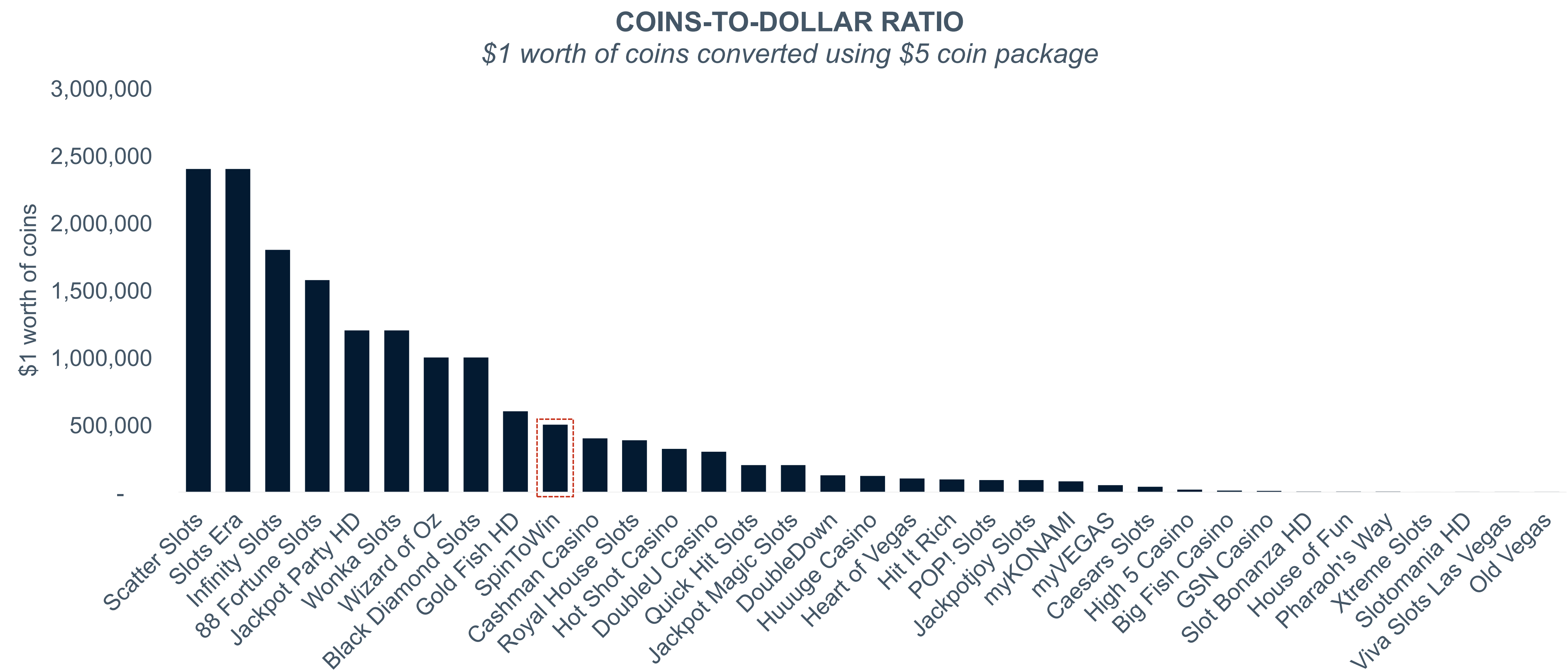
NEW USER TUNING

Despite the low amount of value given, new players have a decent amount of play time upon install: 667x the default bet. At the minimum bet, which is not displayed below, players receive 6,667x the minimum bet, the third highest amount of play time compared to top grossing slots apps



COINS-TO-DOLLAR RATIO

The economy inflation is average relative to top grossing slots apps: 500K 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 App Annie and 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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