LIQUID AND GRIT

Social Casino Report

Competitive research and actionable product recommendations

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NOVEMBER

2017

INTRODUCTION

"We've had three big ideas at Amazon that we've stuck with for 18 years, and they're the reason we're successful:
Put the customer first. Invent. And be patient." – Jeff Bezos

We typically approach product development with quick tests to produce immediate results. This strategy works well for inventions and high beta projects. But, a more patient product development strategy is necessary for foundational features like rewards, customer service, and performance.

Key Takeaways from this Report:

- **Consider intimate competitive experiences:** Scatter Slots released a 5-player tournament feature with a unique win mechanic
- **Add a time-based rewards program:** myKONAMI Slots rewards players based on engagement and spend during a certain time period
- **Generate value from outside the app:** House of Fun released a slots mechanic that lets players shake their iPhone to drop bonuses
- **In Game Design Documents, predetermine the level of design investment each feature should receive:** Bingo Party is a recent top 35 grossing social casino app that was very disciplined about where to (and not to) apply design polish

Liquid and Grit Announcements:

The Feature Database now includes videos of key features, and a grid view to make it easier to find specific screenshots and videos. The navigation was updated for ease of use, and the categorization system was simplified.

Be patient with foundational features.

Brett Nowak
Editor-in-Chief

NEW INNOVATIONS

5-PLAYER TOURNAMENTS

Scatter Slots released a 5-player tournament, *Game of Slots,* where the winner is determined by a wheel spin

- Five players compete and may communicate with emojis (1 & 2)
- At the end of the timed tournament, the size of each slice of the wheel is determined by each player's contribution to the jackpot (3)
- The winner is determined by a wheel spin (4)
- The winner earns coins and a ticket for the end-of-event jackpot (5 & 6)

**Release:** 11/10/17
KPI: Revenue
Target player: Entertain-Me Eddie*
More images: Game of Slots

Related features:
- Team Battle
- PvP Towers
- Ace Tournament

KEY TAKEAWAYS

- Keep competition close to drive revenue and retention. Either invest in a quality matching back-end system or create an Elo Rating System
- Release more personal competition arenas, like 5-player or PvP, to increase engagement with more intimate and entertaining gameplay
- Add a ticket system to reward longer-term, heavy participation (in addition to awarding event wins)
- Continue to test mid core-inspired features. *Leagues*, *Clubs*, and *VIP for a Month* are all impactful casino features brought over from mid-core games
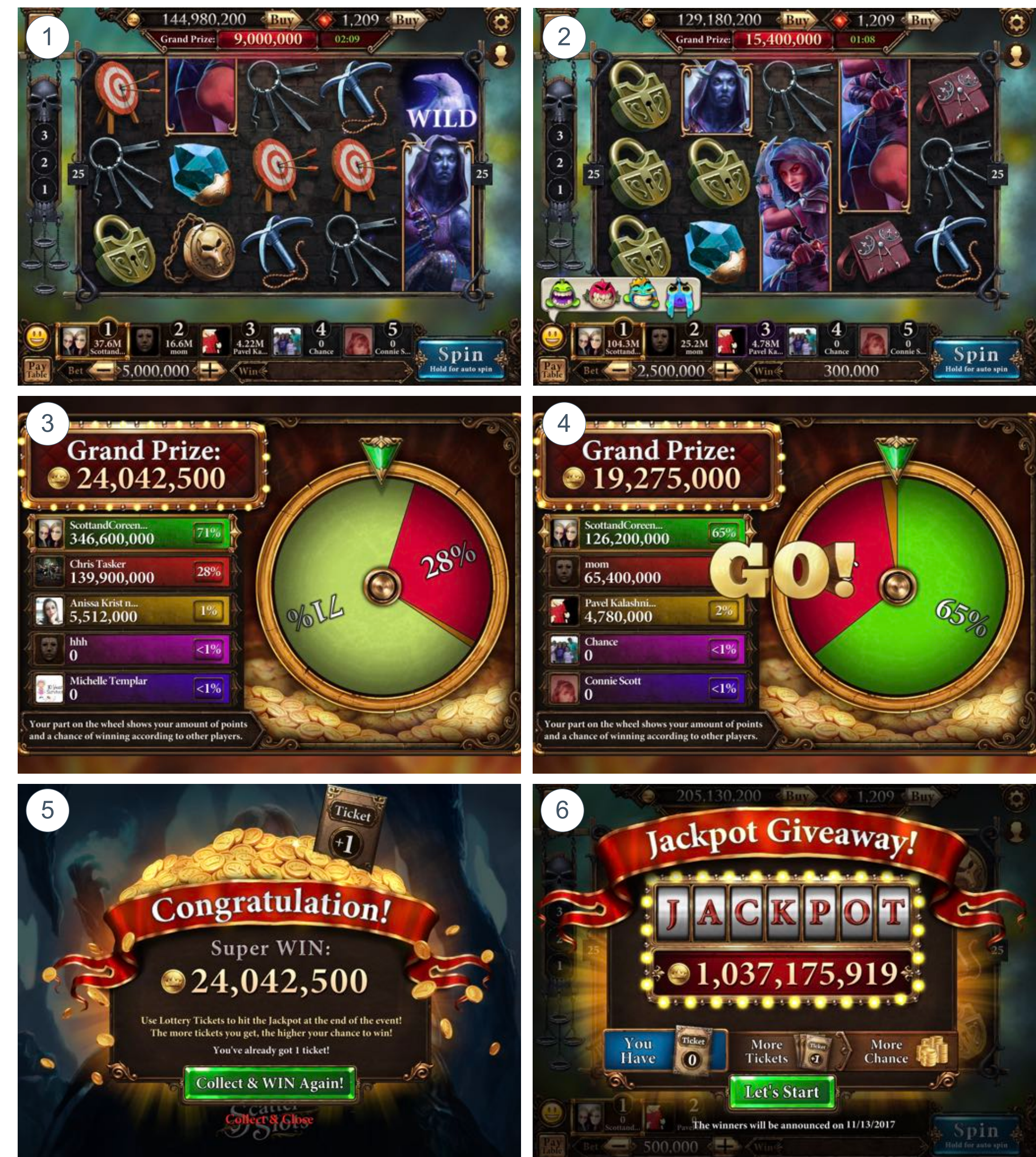
* See the Appendix for more information on each target player type

5

TIME-BASED VIP PROGRAMS

myKONAMI Slots released a VIP Program that shifts players' status based on play and purchases during a certain time period

- Players earn points by playing, purchasing, and connecting to Facebook
- VIP information is included in relevant areas of the app, like the buy page (1)
- The amount of points a player earns in a certain time period determines whether they upgrade, maintain, or lose status (2)
- Status levels maintain for longer periods as players progress to higher VIP levels (3)

Release: 10/26/17
KPI: Retention
Target player: Plain Jane
More images: VIP Rewards

Related features:
- SlotoClub
- Coin Store Levels
- Super Lucky VIP Program

KEY TAKEAWAYS

- Try shorter time periods that reward regularly to engage *very heavy* players
- Release many tiers to keep players constantly moving up and down in status, like in Super Lucky's VIP Program
- Be transparent about how players win points. Social casino players, in particular Plain Janes, are well-versed in rewards systems and want to know how they work
- Highlight features *not* included in a competitor's rewards program. This tactic was illustrated nicely in Matchington Mansion, a Puzzle app that in four months soared from release to top 35 grossing on iPhone in the US, with a feature that poked fun of a competitor (see Casino Ads Dig)
- For a follow-up release, add a subscription program to let players maintain a status (see Elite Membership)

GESTURES

Cradle of Empire, a Puzzle app, released Gestures *in September. This month, House of Fun* Shake the Bonsai *included a* Gesture*-triggered bonus*

- In Cradle of Empire, players complete a quest by shaking their device (1)
- *Gestures* allow players to collect resources and pause the game (2)
- In House of Fun *Shake the Bonsai,* the feature is randomly triggered (3)
- Shaking the device showers down the bonuses hanging from the tree (4)

KPIs: Installs, Engagement
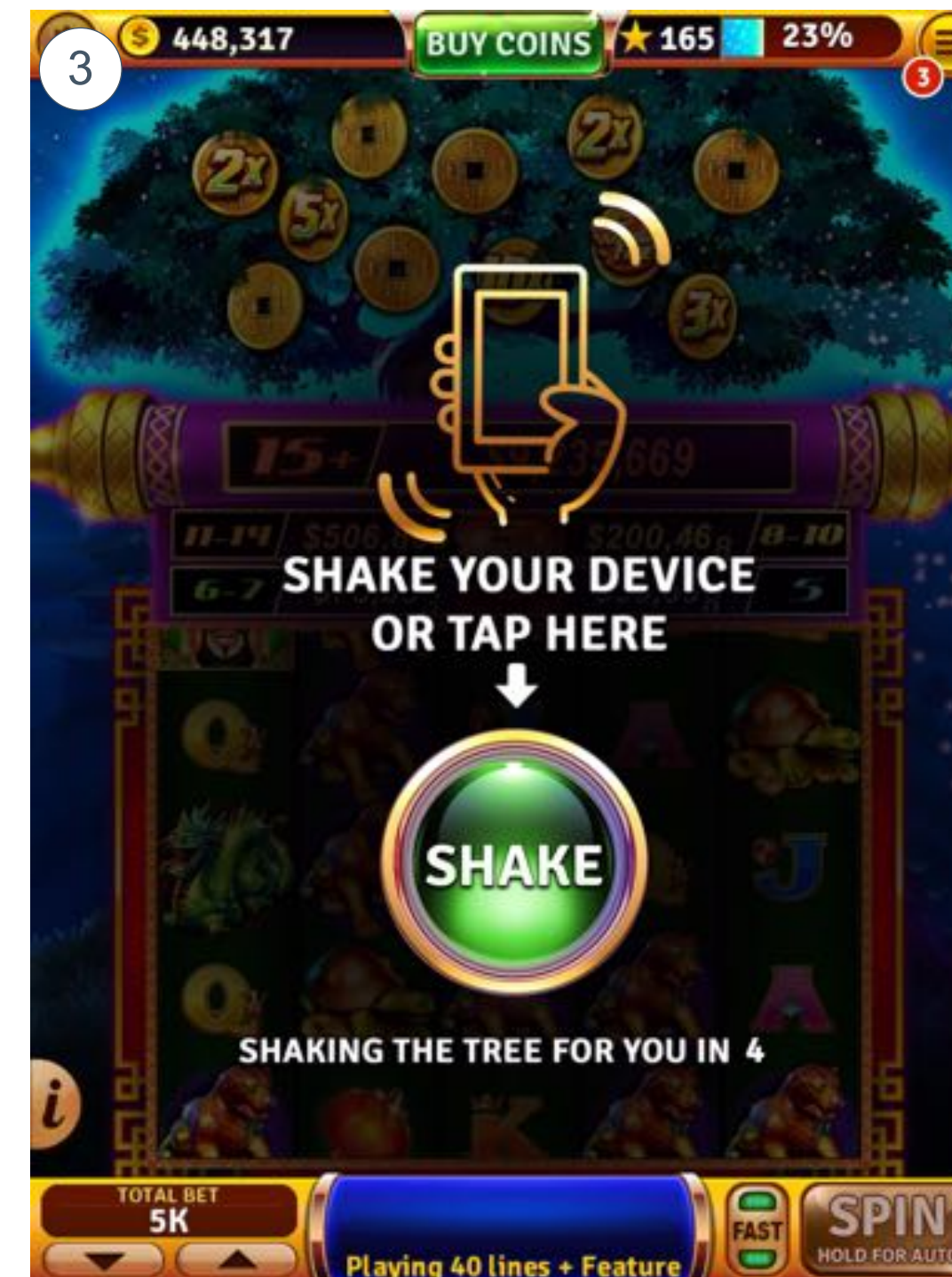**Target player:** Mr. and Mrs. Ricardo
More images:
- Gestures 9/17/17
- Shake the Bonsai 10/26/17

Related features:
- Drag & Drop Calendar Invites
- Snapchat Lens
- iOS widgets

KEY TAKEAWAYS

- To drive word-of-mouth installs, particularly with more social Mr. and Mrs. Ricardo players, release out-of-the-ordinary features, like *Gestures*, *Drag & Drop Calendar Invites,* and *Snapchat Lenses*
- Utilize non-development teams, like the business development team, to form valuable partnerships, like King's partnership with Snapchat. The goal is to generate installs without spending much, if any, on valuable development resources
- Survey players (you have likely already) on Puzzle apps that your players play, and pull in proven mechanics from these apps. *Email us if you'd like to check out a Puzzle Report*

In match-3 levels, you can pause and unpause the game by shaking the device.

SHAKE YOUR DEVICE OR TAP HERE

SHAKE

SHAKING THE TREE FOR YOU IN 4

QUICK WINS

- **Decrease churn to make losing *feel* like winning:** This type of event will appeal to more serious, heavy spender players like Plain Janes. In Cashman Casino, there are two tasks in the *Daily Cashman Challenge* that require losing streaks. Completing all the challenges awards a prize (1 & 2)
- **Add large coin incentives for inviting new friends to generate installs:** For the more social Mr. and Mrs. Ricardos, give more perks for inviting friends. WSOP awards players 2M coins, ~$3.00 worth of value, for inviting a new friend. Try giving out an amount equivalent to a high-value install, like $10 worth (3 & 4)
- **Release BOGO packages to drive new buyer conversion:** In Viva Slots Las Vegas, players may buy a *BOGO Jackpot Offer,* which is a buy-one, get-one free package (5 & 6)
- **Create package names with strong marketing messages:** In House of Fun's *Enter to Win* event, the package is titled, "Get a generous package of House of Fun coins." Players view that messaging in the last step of the purchase flow (7)
- **Require players to spin to earn retention bonuses to increase *true* retention:** In Wizard of Oz *Monthly Magic Reward,* players must spin each day of the month to earn coins and have a chance at the event's jackpot (8)

Additional images:
- Daily Cashman Challenge
- Invite Frenzy
- BOGO Jackpot Offer (also see BOGO)
- Enter to Win
- Monthly Magic Reward
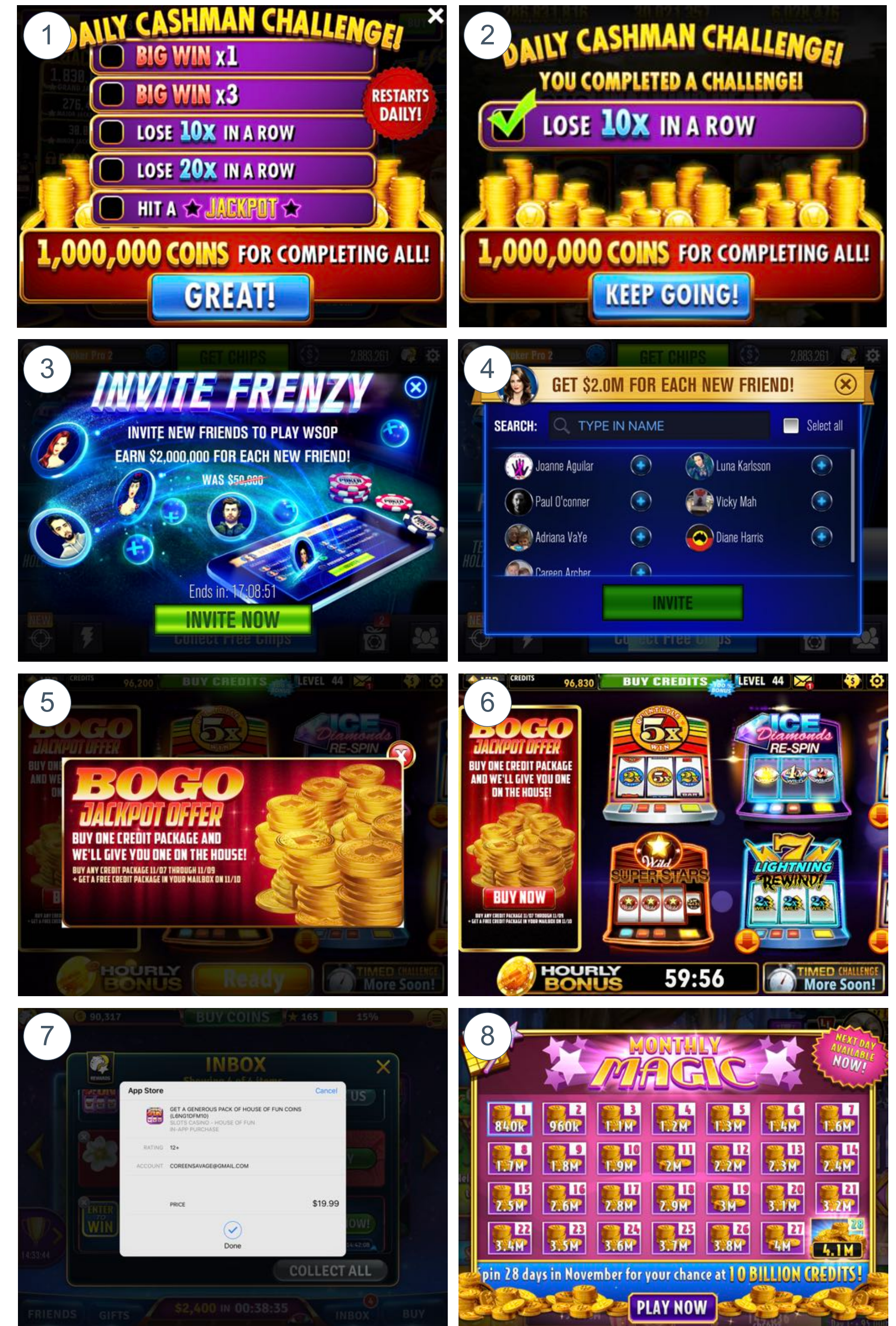
LIVE OPS

LIVE OPS

- **Return part of a player's spend during difficult, revenue-driving events to decrease churn:** Tuning events harder will increase revenue from Plain Janes, but will also potentially increase frustration and churn. Giving some amount back will decrease the negative association with revenue-driving events. Classic Vegas Casino *Creepy Tour of Candyland* uses this mechanic well (1 & 2)
- **Add creative bonuses to packages to convert new players:** House of Fun has two examples: 1) coins *and* 100 free spins for $19.99, and 2) coins *and* 7 days of free coins for $23.99 (3 & 4)
- **Give recognition to players for massive wins to increase bet per spin:** WSOP *2017 Cash Rings* awards players a red and blue ring for wins of $250M and $5B, which is ~$30.00 and $55.00 worth of coins using the Level 21 chip packages (5 & 6)

Additional images:
- Creepy Tour of Candyland
- 100 Free Spins and 7 Days of Free Coins
- 2017 Cash Rings
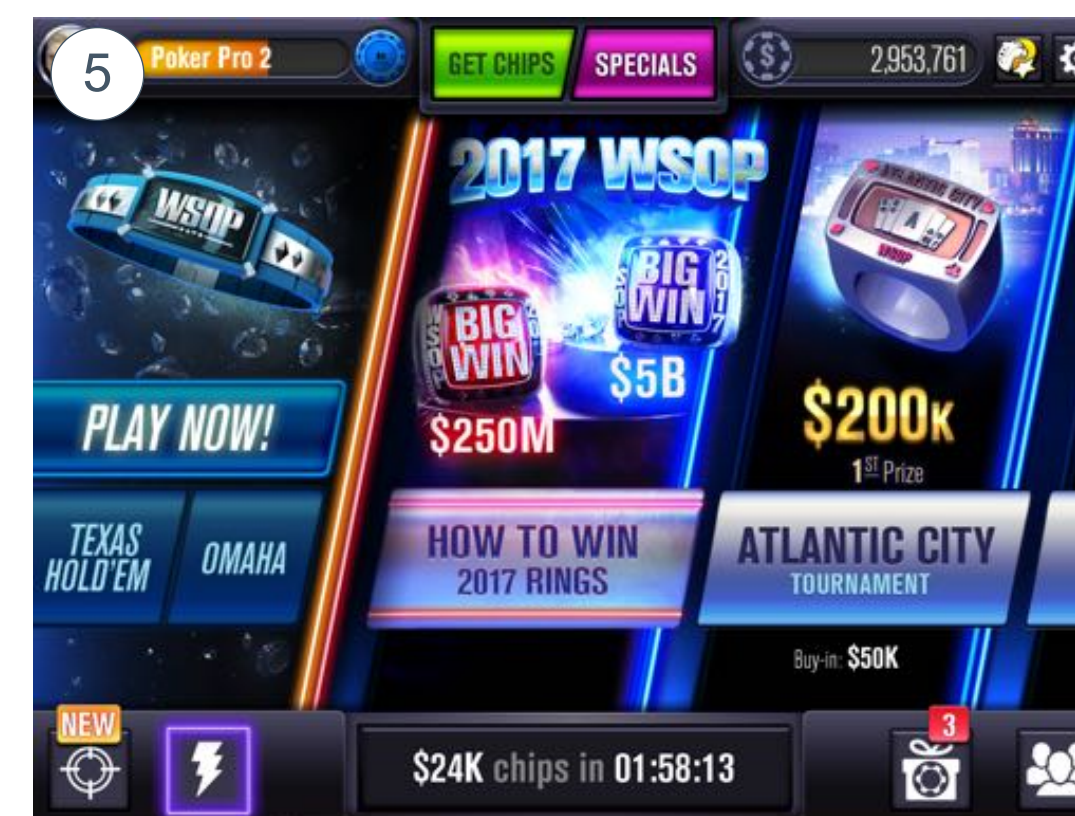
PROGRESSIVE FRENZY

Black Diamond 'Spin to Win' event *Progressive Frenzy* guarantees players a jackpot upon completing the collection

- Players must spin and collect to win a jackpot machine spin (1)
- Select machines are included in the feature (2)
- A progress bar in the machine fills with randomly-triggered collection items. The progressive jackpots are all listed at the top of *Progressive Frenzy* machines (3)
- Players receive a spin of a jackpot symbol only machine (4)

Release: 10/18/17
KPI: Engagement
Target players:
- Entertain-Me Eddie
- Night-Out Nancy

More images:
- Progressive Frenzy

Related features:
- Jackpot Days
- Royal Power Jackpot Event
- Jackpot 9s Challenge

KEY TAKEAWAYS

- Consider a collection system that guarantees a jackpot win. Night-Out Nancy and Entertain-Me Eddie players both gravitate towards progressive jackpot machines (40% and 37%, respectively)
- Use simple slot machines to increase excitement around triggering the feature, like in this event and Jackpot 9s Challenge
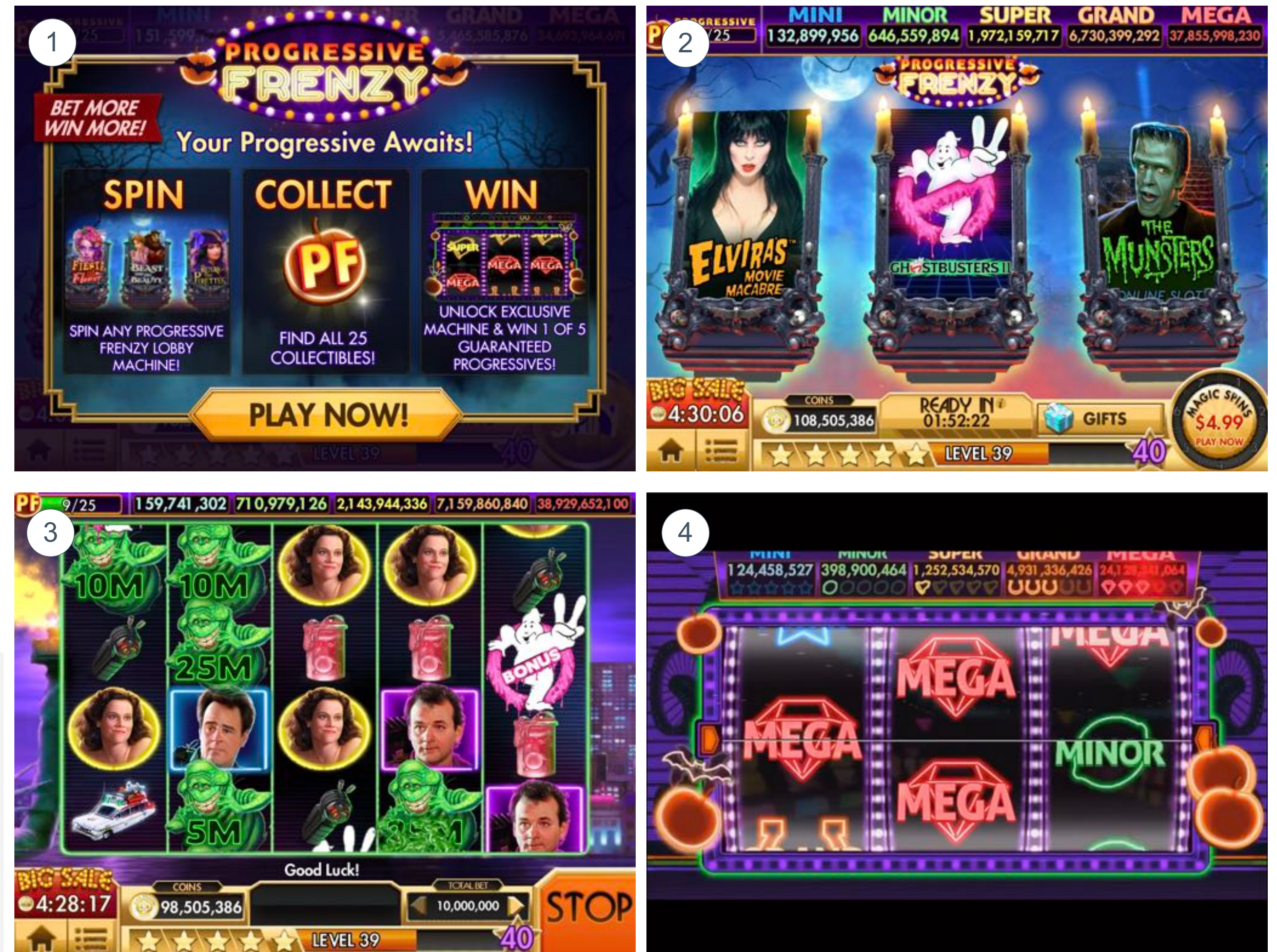
MARKET WATCH

10/15/17 – 11/10/17

TOP GROSSING 1 – 18

App	Notable Changes	More Information
Bingo Blitz	• **Collection feature released:** collection feature, like SlotoCards, but players collect characters instead of cards	• Jingle Blitz
Big Fish Casino	• **Retention system added:** *Bonus Vaults* released (originally released in Jackpot Magic Slots)	• Bonus Vaults
Cashman Casino	• **Daily challenge feature released:** challenges include losing 10 and 20 in a row • **Jackpot minimum bets were lowered**	• Daily Cashman Challenge • Jackpot Update
WSOP	• **Friend request incentives increased**	• Invite Frenzy
Wizard of Oz	• **Retention calendar event:** players spin every day in November for a daily award and a chance to win big	• Monthly Magic Reward
myKONAMI Slots	• **New UI** • **VIP rewards:** tier and benefits based on engagement and spend	• New UI • VIP Rewards

TOP GROSSING 19 – 50

App	Notable Changes	More Information
Wonka Slots	• **Play to collect event:** players spin to collect randomly falling berries that fill up a meter. Larger bets fill the meter faster • **Hi-Lo mini game added:** players guess if the next card will be higher or lower than the previous	• Berry Burst • Snozzberry Streak
Black Diamond Slots	• **Spin to collect event:** players are guaranteed to win a jackpot once they fill the meter	• Progressive Frenzy
Bingo Pop	• **Retention 'gotcha' system with tickets:** players win tickets in events and spend them to win pets and prizes	• Ticket Exchange
Pharaoh's Way	• **New challenges content:** new challenge pyramid released	• Champion Challenges
Hot Vegas Slots Casino	• **VIP program released:** benefits based on store purchases and 101 VIP levels	• Super Lucky VIP Program
Bingo Showdown	• **Game enhancement:** automatically activate power-ups when the meter is filled	• Auto Fire
Poker Heat	• **League changes:** changes to the number of leagues and the benefits to players	• Changes to Leagues

APP TEARDOWN:
BINGO PARTY

BINGO PARTY

Bingo Party very successfully appeals to many different types of players and desires

- Players progress along a map with rooms that unlock with level-ups (1)
- Players receive tickets and power-ups in the daily bonus (2)
- A challenge system requires players to complete 5/10 tasks for tickets and power-ups (3)
- Competitive players may compete in *Chase Rooms* that are not associated with the main map. These rooms hold their own collection and leaderboard/tournament system (4)
- Non-traditional bingo play is available off the map in the 'Other Games' area (5 & 6)
- Players may join an elite membership with a one-time purchase for a 30 day bundle of additional tickets and power-ups, and to unlock the 8 card UI for bingo play. This is not a renewed subscription package (7)
- Live ops includes *map* and *play to collect* systems (8)

Release: 5/9/17
More images: Casino > Game > Bingo Party

Related features:
- Daily Challenges
- Festival Game Play
- New User Flow

KEY TAKEAWAYS

- Provide features for clear player-type desires. Bingo Party has a map for players who want to progress; a daily challenge system for players who want to achieve; and *Chase Games* for players who want to compete
- In pre-development, rank each feature for design polish level. This will dramatically speed up time-to-release. The daily bonus in Bingo Party is very simplistically designed, whereas the map nodes and characters are very detailed
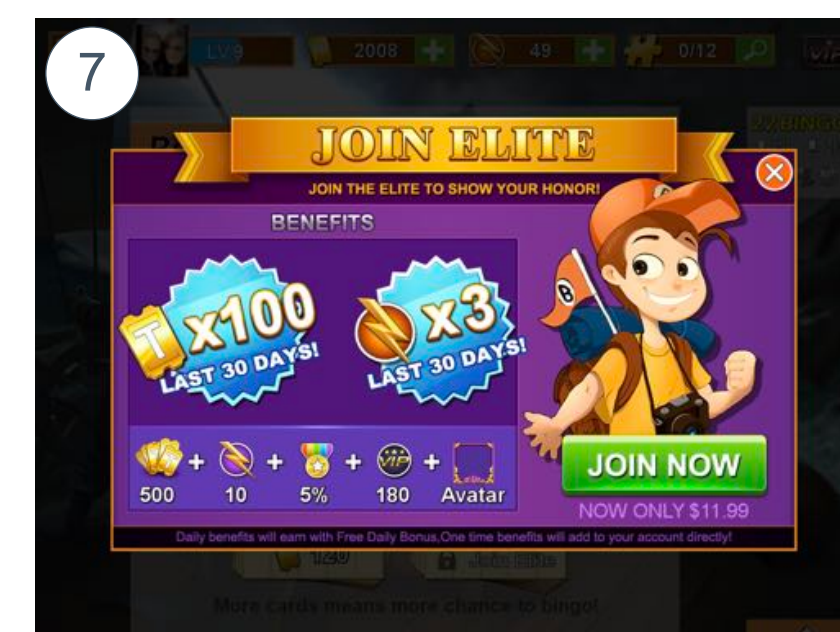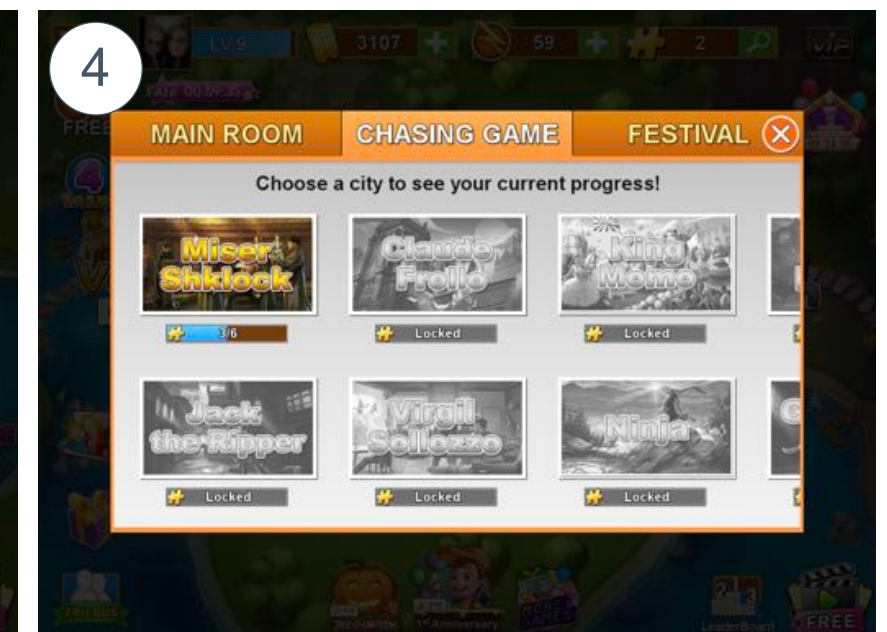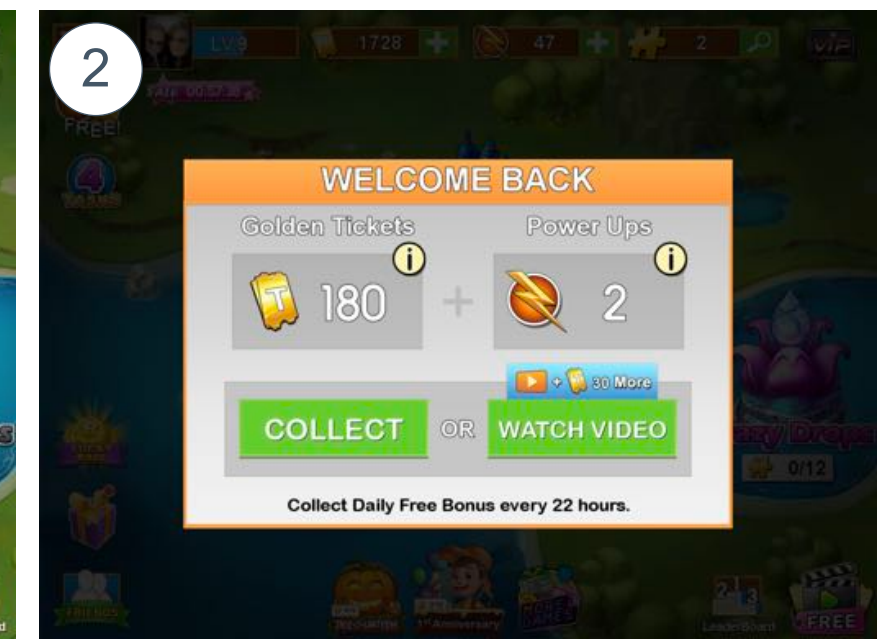
RANKING

Bingo Party went from launch to a top 35 grossing iOS app in the US…before Apple took it down from the store on 11/2/17. According to the Bingo Party community page, there was a payment issue that restricted purchases. The app is now back in the store

iPHONE US GROSSING RANK
Category Games > Casino

— Bingo Party
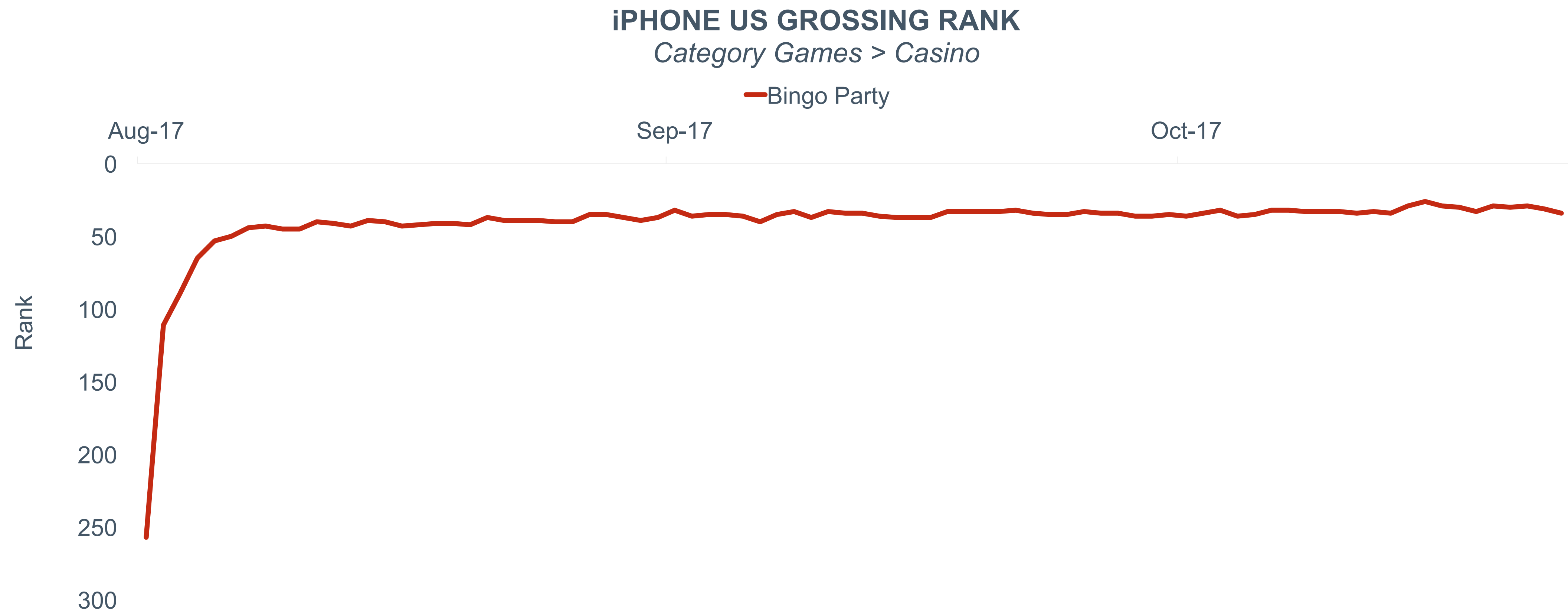
INITIAL CURRENCY BALANCE

Players receive an average amount of value upon install

INITIAL CURRENCY BALANCE
Initial balance converted using the $5 package
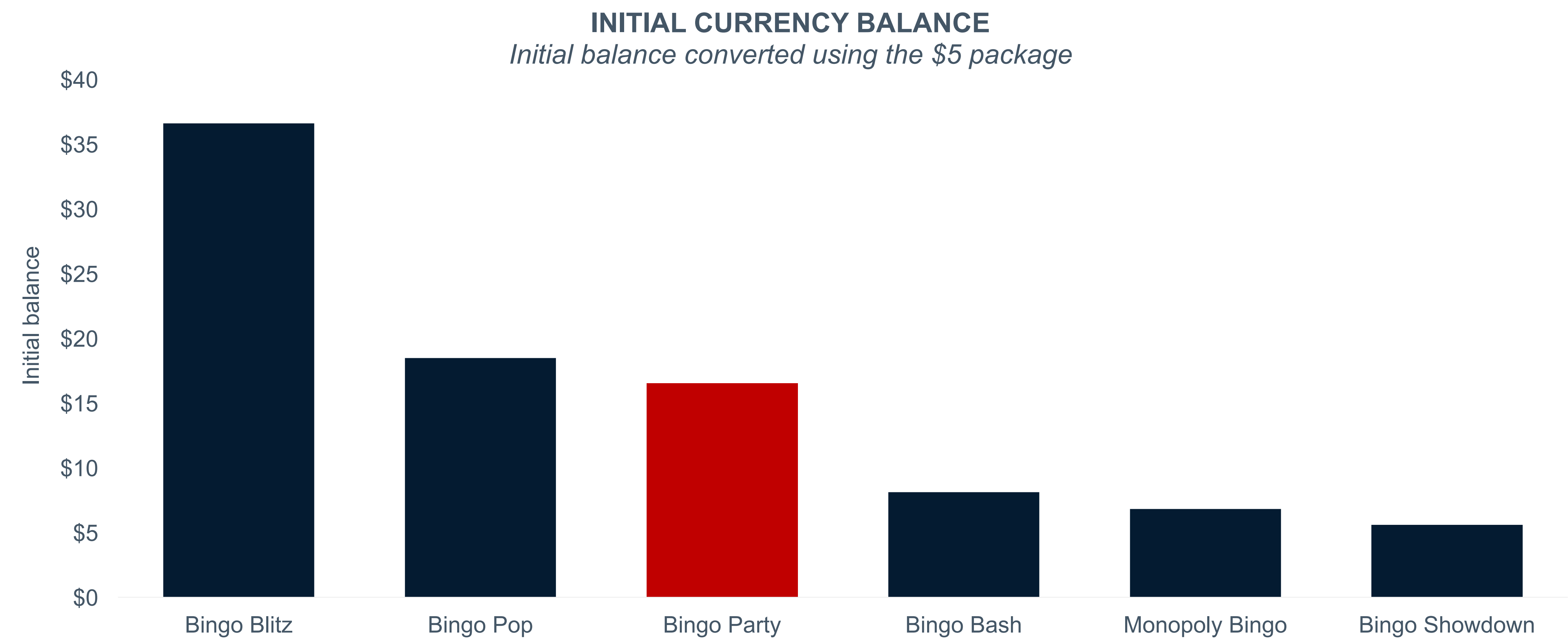
TOTAL VALUE OF CURRENCY BONUSES

Returning players receive a small amount of play time value each day

TOTAL VALUE OF CURRENCY BONUSES
Daily bonuses converted using the $5 package
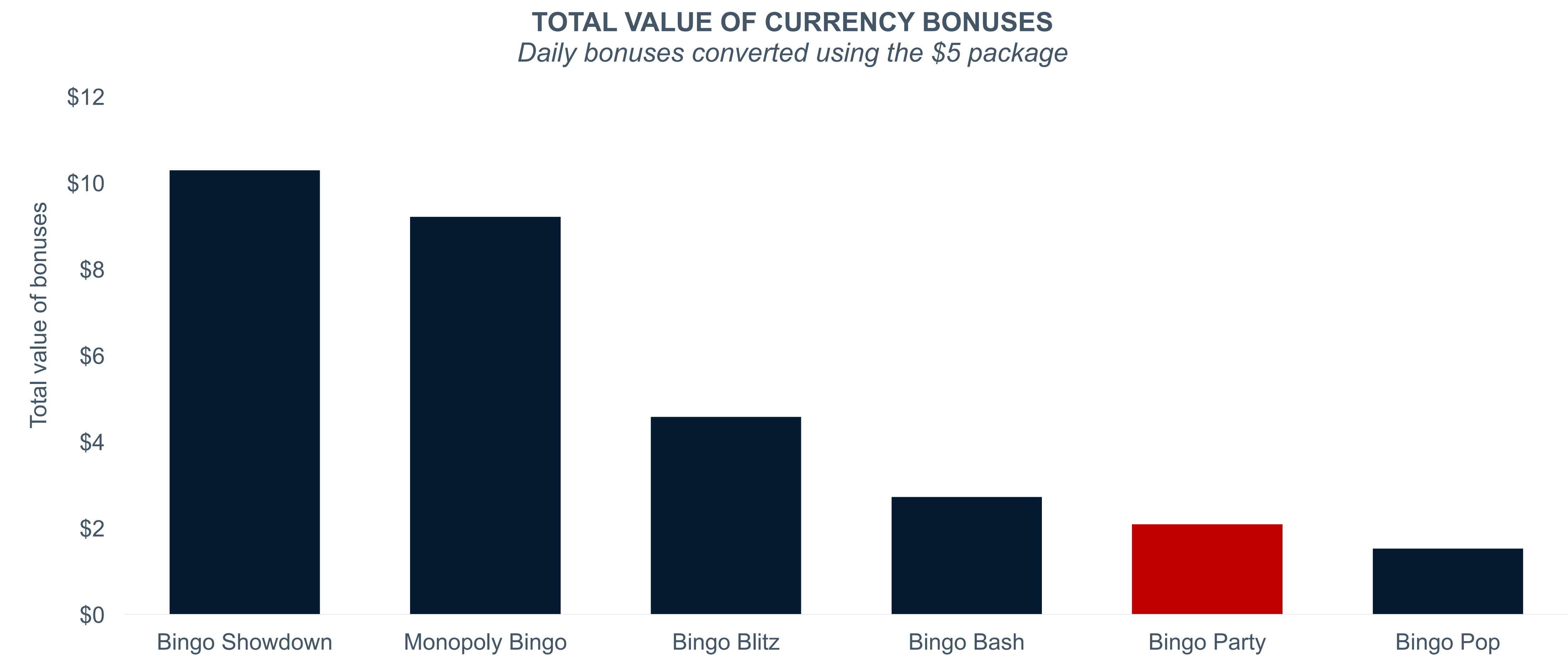
NEW USER TUNING

Based on the install value and minimum bet cost, players receive an average amount of playing time compared to the top grossing bingo apps

MINIMUM BET TUNING
Initial currency balance divided by minimum bet

20
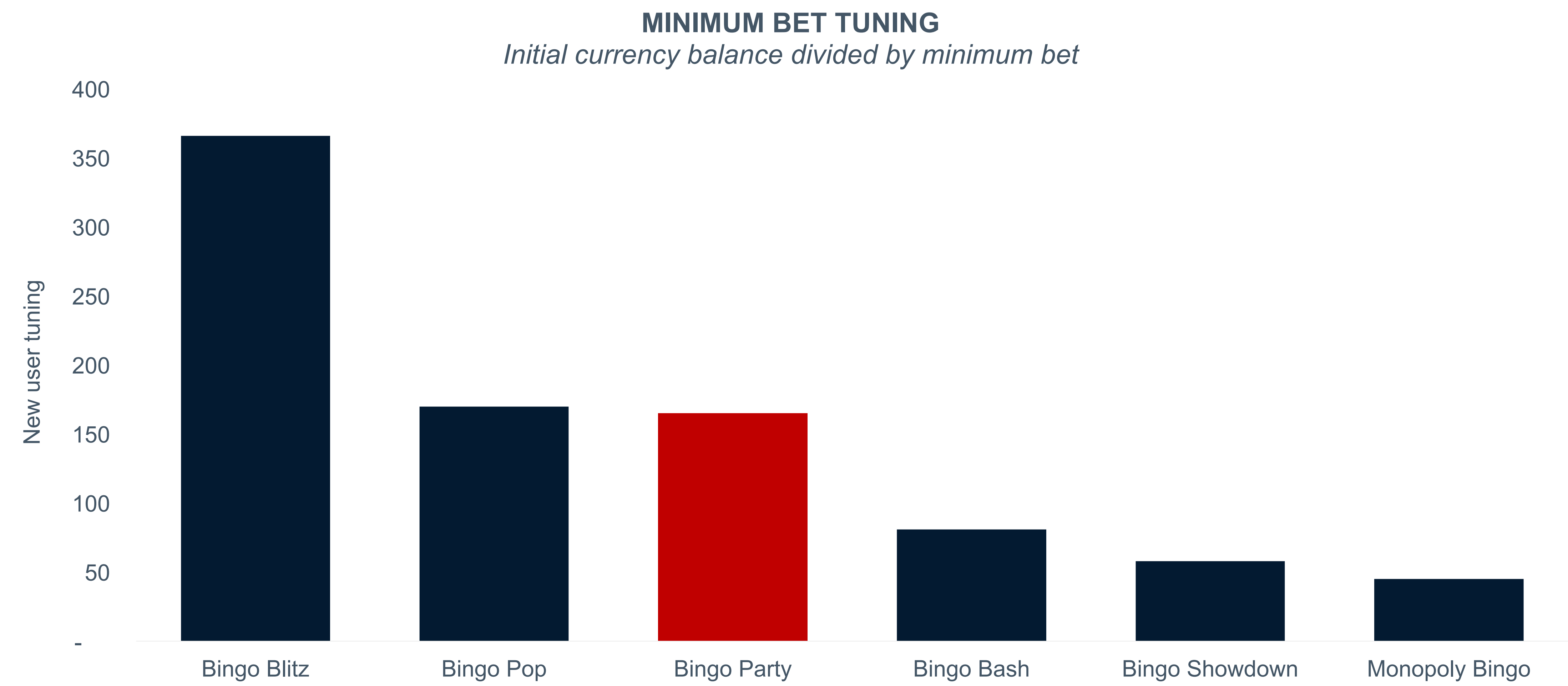
CURRENCY-TO-DOLLAR RATIO

To position the currency as a higher *perceived* value, Bingo Party's economy is highly inflated

CURRENCY-TO-DOLLAR RATIO
$1 worth of currency converted using the $5 package
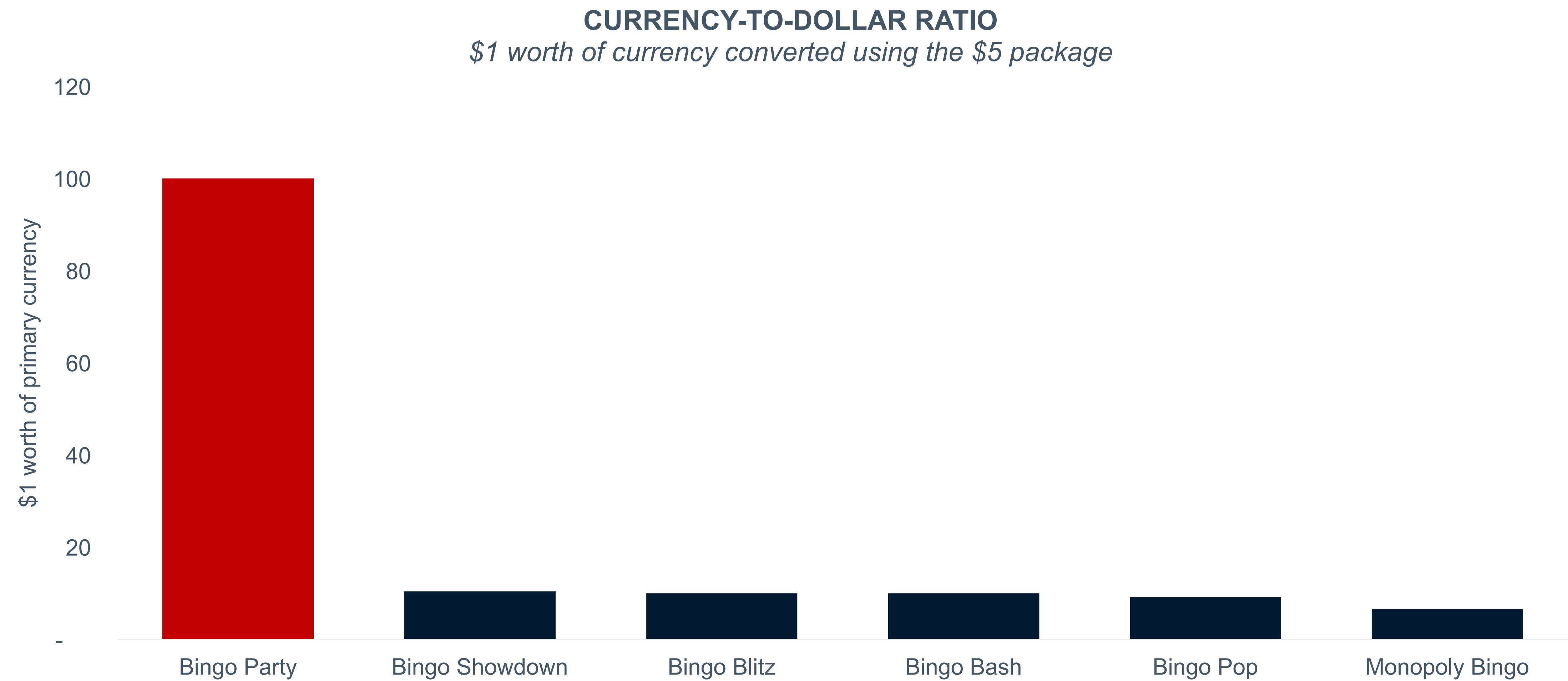
APPENDIX

SLOTS PLAYER PERSONAS

	PLAIN JANE	NIGHT-OUT NANCY	ENTERTAIN-ME EDDIE	MR. AND MRS. RICARDO
Gambling desire	Utility	Excitement	Multi-Purpose	Relaxation
Motivation	Looking for something to do, kill time, and reduce boredom	Wants a buzz, thrill of winning a jackpot, relaxing, and having a good time	Considers machines "lucky" or fun to play	Socialization, have fun, and relieve day-to-day stress
Features for choosing one game over another	Denomination that I want to play	Bet within budget, fun game to play	Fun game to play, good chance of winning	Fun game to play, denomination want to play
% of machines played with progressives	29%	40%	37%	25%
Player Income	Medium-high	High	Low	Medium-low
% female	54%	59%	45%	48%
Size of group	20%	28%	27%	26%

Data adapted from Sandy C. Chen, "Segmenting slot machine players: a factor-cluster analysis," College of Business, Oregon State University, Bend, Oregon, USA. 2013

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 the coins required for level completion. Then, that amount is converted to a dollar amount using $5 worth of non-sale purchasable coins, as mentioned above.

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– Jeff Bezos

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