



LIQUID AND GRIT

Social Casino Report

Competitive research and actionable product recommendations

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DECEMBER

2017

EXECUTIVE SUMMARY

Your time is precious. As a result, the chart below outlines what we focused on in this report. In addition to the features below, check out the Market Watch for new developments in recent months and the Game Teardown for a very close look at Ellen’s Road to Riches Slots.

IF	THEN	DO
You notice a decline in satisfaction from your highest value players	Explore customer support features to decrease whale churn	Personal VIP Agent This is an early version of direct-to-consumer chat...so there is room for feature growth in the next iteration
You target social <i>Mr. & Mrs. Ricardo</i> players	Test photo sharing in key areas to improve retention	Share Device Photos This feature taps into <i>very popular</i> social interactions on mobile and can be added to more areas of your game
You need to <i>match</i> or <i>beat</i> a competitor’s poker play modes	Consider implementing Boost Poker mode based on your product strategy to increase engagement	Boost Poker This is a great short-session poker play mode
You need a confident, revenue-driving event	Invest in Purchase Options because, among other things, it’s very close to the bottom of the purchase funnel	Purchase Options This event gives players bonus options based on total spend as a simple way to personalize an add-on bonus
You want to periodically boost engagement and revenue	Cost out this larger event that will pay off with a collection feature tied to play and purchase	Recall Mini Game The report includes ways to decrease the significant development investment
You see new players are making a lot of early purchases but tapering off spend...or...payers desire certain items every month that could be converted to a subscription package	Discuss with Apple an Annual Subscription iOS Store card. Then, review the economy system tied to the subscription as it modifies a proven retention and monetization mechanics from <i>Idle Games</i>	Piggy Bank Subscription Certain top grossing apps have two iOS Store cards; one for the product and the other for an Annual Subscription Trial

"If you have everything under control, you're not moving fast enough"
- Mario Andretti, world champion racing driver

NEW INNOVATIONS

PERSONAL VIP AGENT

Poker Heat introduces a VIP Agent for players through Facebook Messenger

- Players are offered an agent at app-entry and on Facebook (1 & 2)
- Players must connect to Facebook Messenger (3)
- The agent sends a personalized greeting with a *Free Chips Gift*. Players are informed that they should email support for any assistance (4 & 5)
- Clicking the gift opens the app and awards the VIP gift on entry (6)

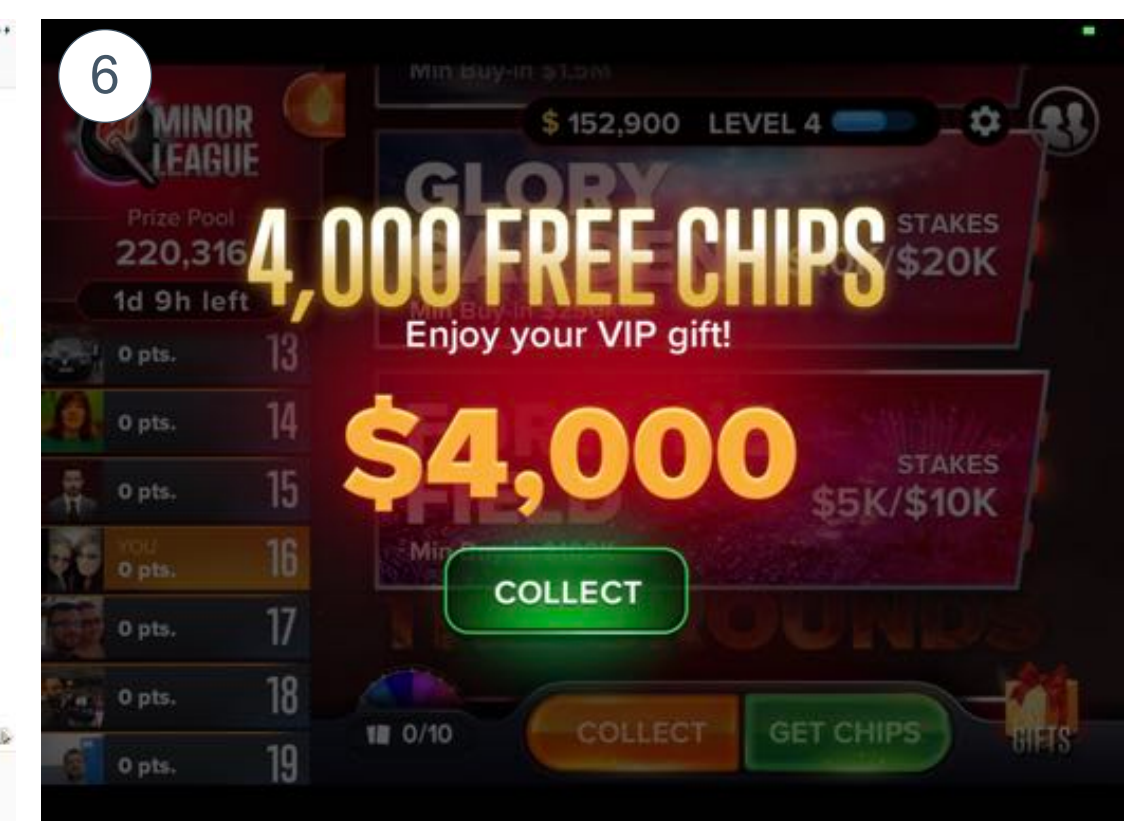
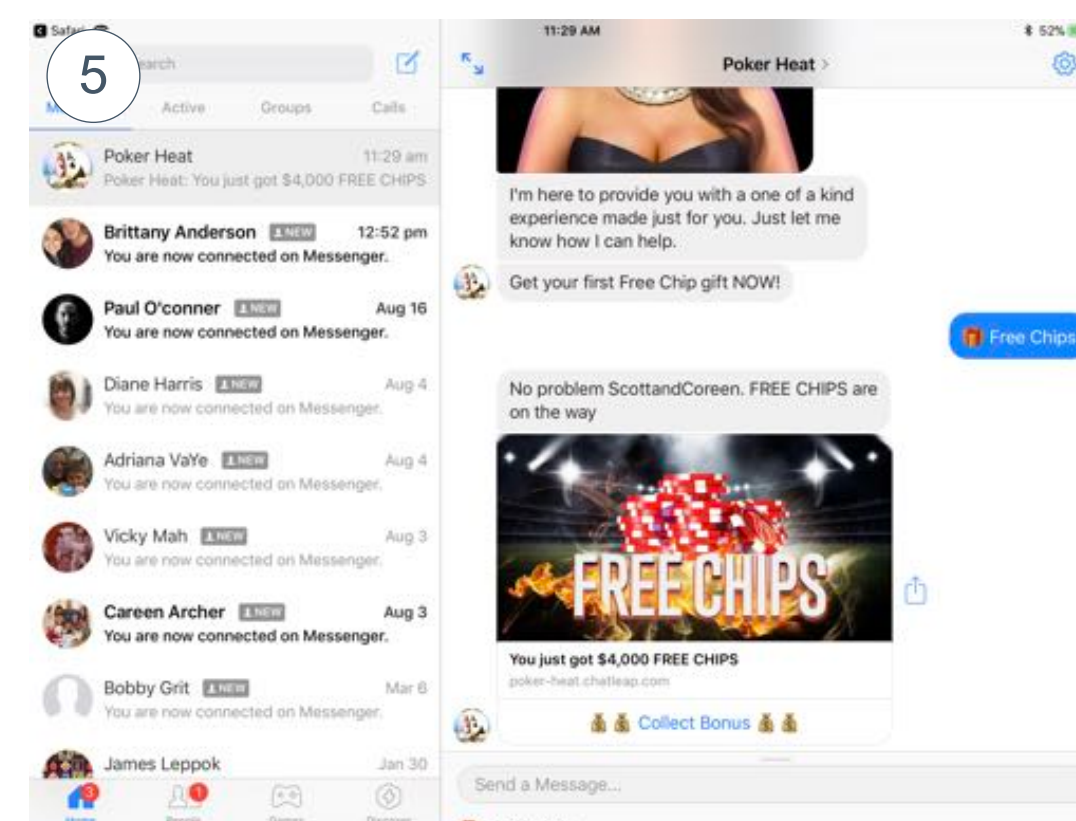
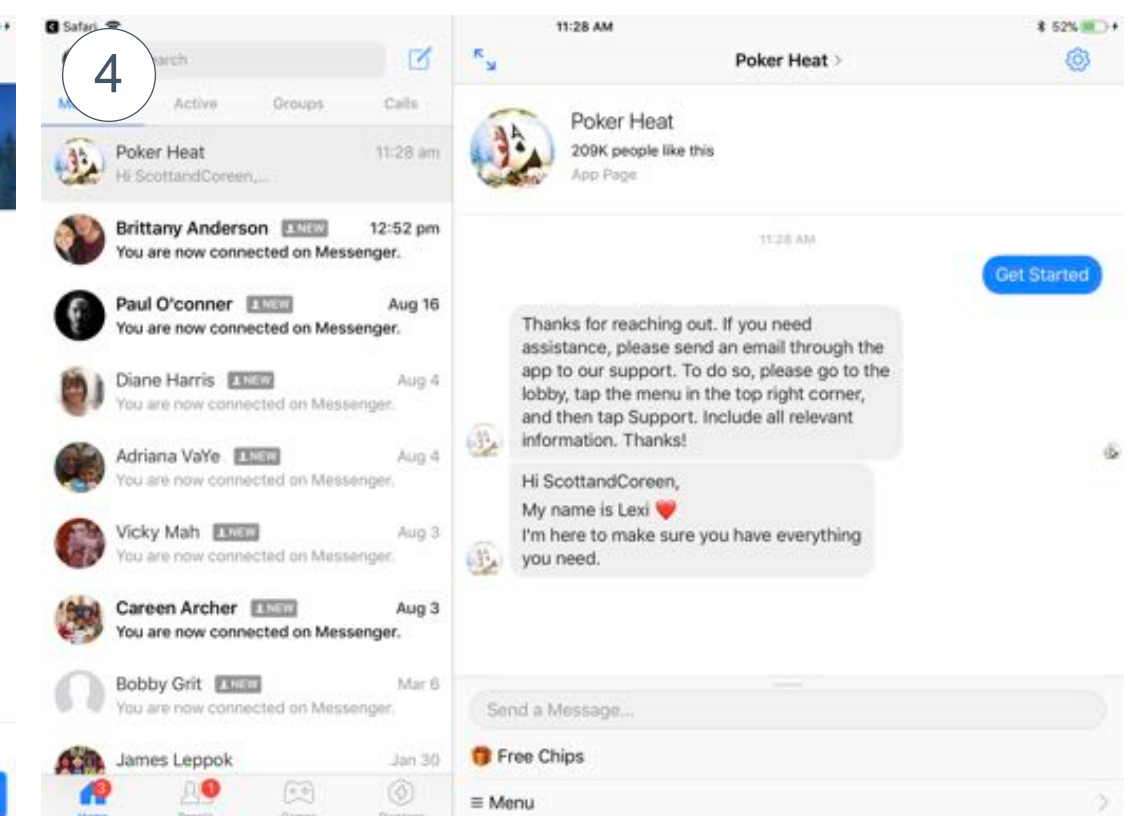
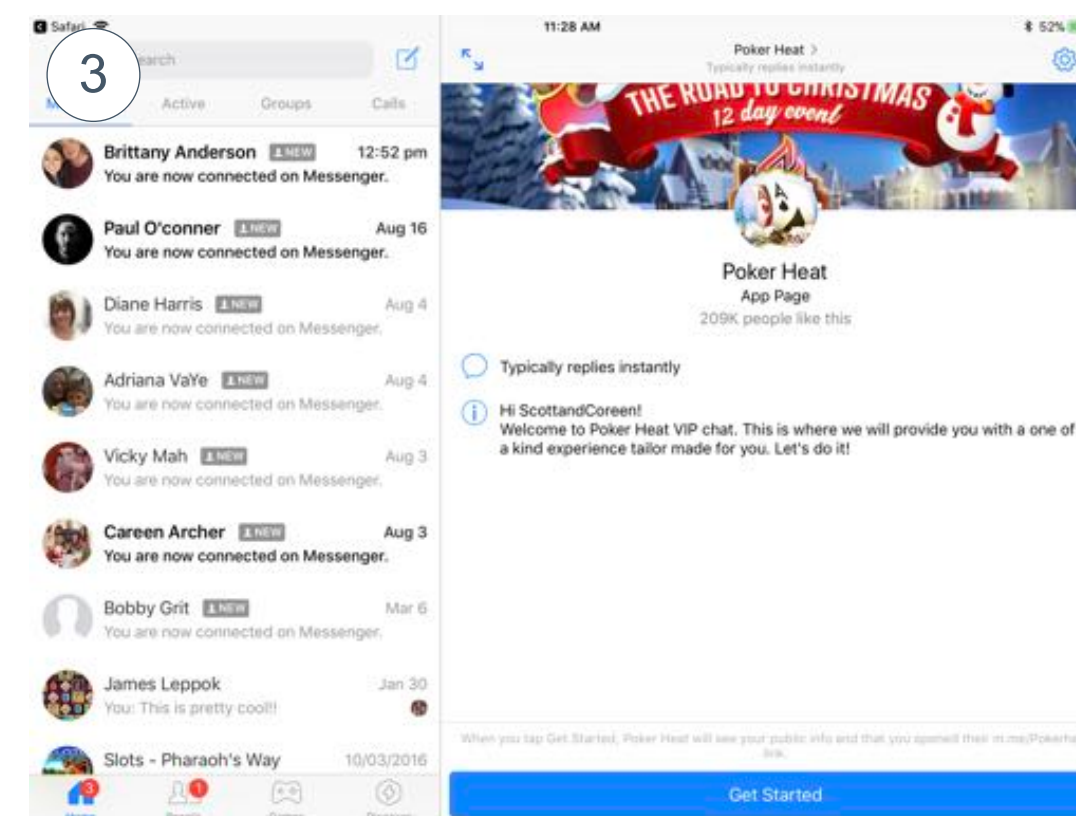
- Release: 11/19/17
- KPI: Revenue (reducing whale churn)
- Target player: Whales

Related features:

- [Live Chat Support](#) - Slotomania
- [New VIP Program](#) - Black Diamond Slots
- [Tutorial / VIP Host](#) - GSN Grand Casino

KEY TAKEAWAYS

- Continue to make your app more intimate for players. Research clearly demonstrates that emphasizing customer service can produce a strategic advantage (see Harvard Business Review's, "[Customer Intimacy and Other Value Disciplines](#)")
- Learn from land-based casinos. Social Casino still lags behind Las Vegas-level customer service support. Consider hiring a land-based industry consultant to quickly understand their customer service capabilities
- Add multiple ways to connect—like telephone support—depending on a player's LTV



Click here for more images and videos online 

SHARE DEVICE PHOTOS

Big Fish Casino expands social messaging by allowing friends to share images from their device

- The feature is marketed upon app-entry (1)
 - The core Inbox feature was added in November 2016
- Players must be connected to in-app friends (2)
- A *Send Photo* option is available in the messaging screen (3)
- Players may choose a camera or library image to post in the conversation (4)

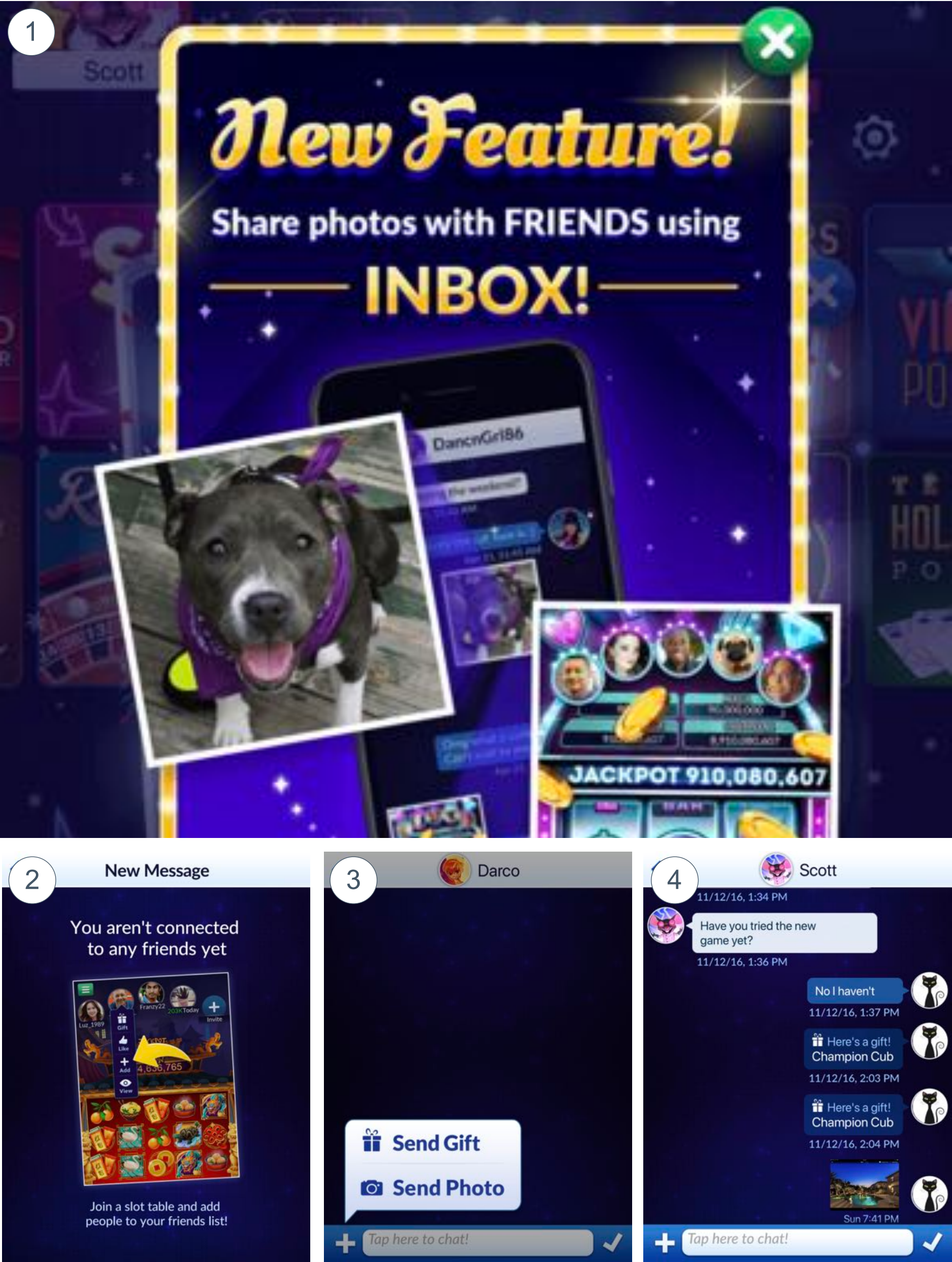
- Release: 12/9/17
- KPI: Retention
- Target player: Mr. and Mrs. Ricardo

Related features:

- [Inbox](#) - Caesars Slots
- [Snapchat Filter](#) - Bubble Witch 2 Saga
- [iOS Widget](#) - Cradle of Empires
- [Inbox / Messaging](#) - Big Fish Casino

KEY TAKEAWAYS

- Connecting camera is an underutilized feature in social casino
- Players are *surprisingly* liberal with personal information, like photos, and will add pictures to areas like group chat if the feature is enabled
- To drive meaningful social engagement, embed community evangelists that *appear* to be very social players. [Slotomania Supergroup Revamped](#) is a great example (with 422K members, this group is driven partly by admins, some of whom *work* at Playtika)



BOOST POKER

Pokerist released a three player tournament with a jackpot wheel that determines the winning amount

- Three players sit at the table for a *Quickfire Texas Hold 'Em* tournament (1)
- There are different buy-in amounts (2)
- The jackpot is determined by a spin of a wheel (3 & 4)

- Release: 11/30/17
- KPI: Engagement

Related features:

- [Party Modes](#) - Pokerist
- [Powerhand Jackpot](#) - WSOP
- [Omaha Roulette](#) - WSOP
- [Crown Hold'Em](#) - WSOP
- [Mega Fast Cash](#) - Zynga Poker Texas Hold 'Em

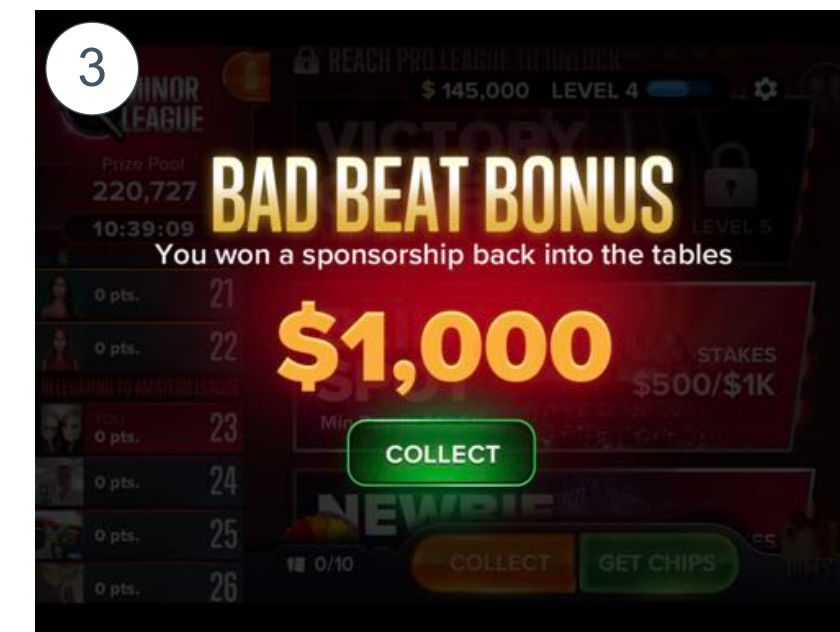
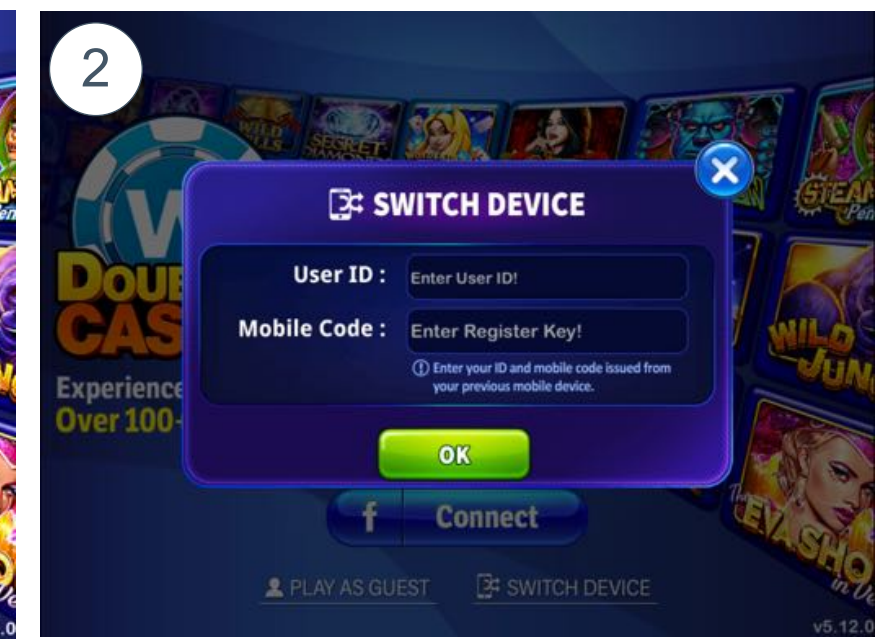
KEY TAKEAWAYS

- Before releasing a new poker play, decide your strategic product direction for poker play modes. Pick one option:
 - *Below expectations*: Decide to only offer the core poker modes and focus your valuable resources on other meta-features
 - *Meet expectations*: Fast follower a leader in poker play modes and match all of their offerings
 - *Above expectations*: Become the market leader in poker play modes, match all competitors, and add new modes
- The rationale is that one or two new poker modes, if not at least meeting expectations, will waste resources because your app will remain below expectations while still using valuable development resources



SURPRISE & DELIGHT

- **Allow players to easily connect accounts from other devices to decrease whale churn:** To allow players to easily transfer their player information from one device to another, without needing Facebook connect, provide an option to *Switch Devices*. Players use a User ID and Mobile Code to input their player data in DoubleU Casino (1 & 2)
- **Keep players playing when on tilt after a bad beat to increase purchases:** Losing a large amount of chips, particularly with a bad beat, is one of the most emotionally-driven moments for purchases. Give players just enough chips—based on the amount lost—to continue to play so they can make a purchase and attempt to win back their chips, similar to Poker Heat's *Bad Beat Bonus* (3)
- **Add a mini game with watch-to-earn videos to generate more non-payer revenue:** In Bingo!, players may win a Scratcher card by watching a sponsored video (4). Also see [Watch to Earn Machine](#) in Black Diamond Slots and [Pick 'Em Bonus Watch to Earn](#) in Hit it Rich
- **Allow players to more easily find machines with better lobby navigation:** In Caesars Slots, players may now easily go to the end of all the machines using a small slider button sitting on the bottom right corner of the lobby (5)
- **Drive more engagement with the Facebook community page by utilizing promo codes that unlock special content:** In Hit it Rich, players are informed in the app that they may unlock premium content by entering a promo code. This code is found on the Facebook community page (6)
- **Add multiple options to a wheel to let players pick the level of risk/reward designed in a bonus:** In Scatter Slots' new *Dragon's Gold* mini game, players may spin 1 of 3 versions of a wheel. Each version changes the risk/reward of the spin (7 & 8)



LIVE OPS

PURCHASE OPTIONS

Slotomania released an event that lets players choose between prize options based on one day's worth of total spend

- Players must make a purchase during the event to choose up to 6 prizes (1)
- The entire lobby includes prizes displayed on the lobby cards (2)
- Bigger total purchases that day give more prize options (3)
- Players may select a prize or take a random selection (4)

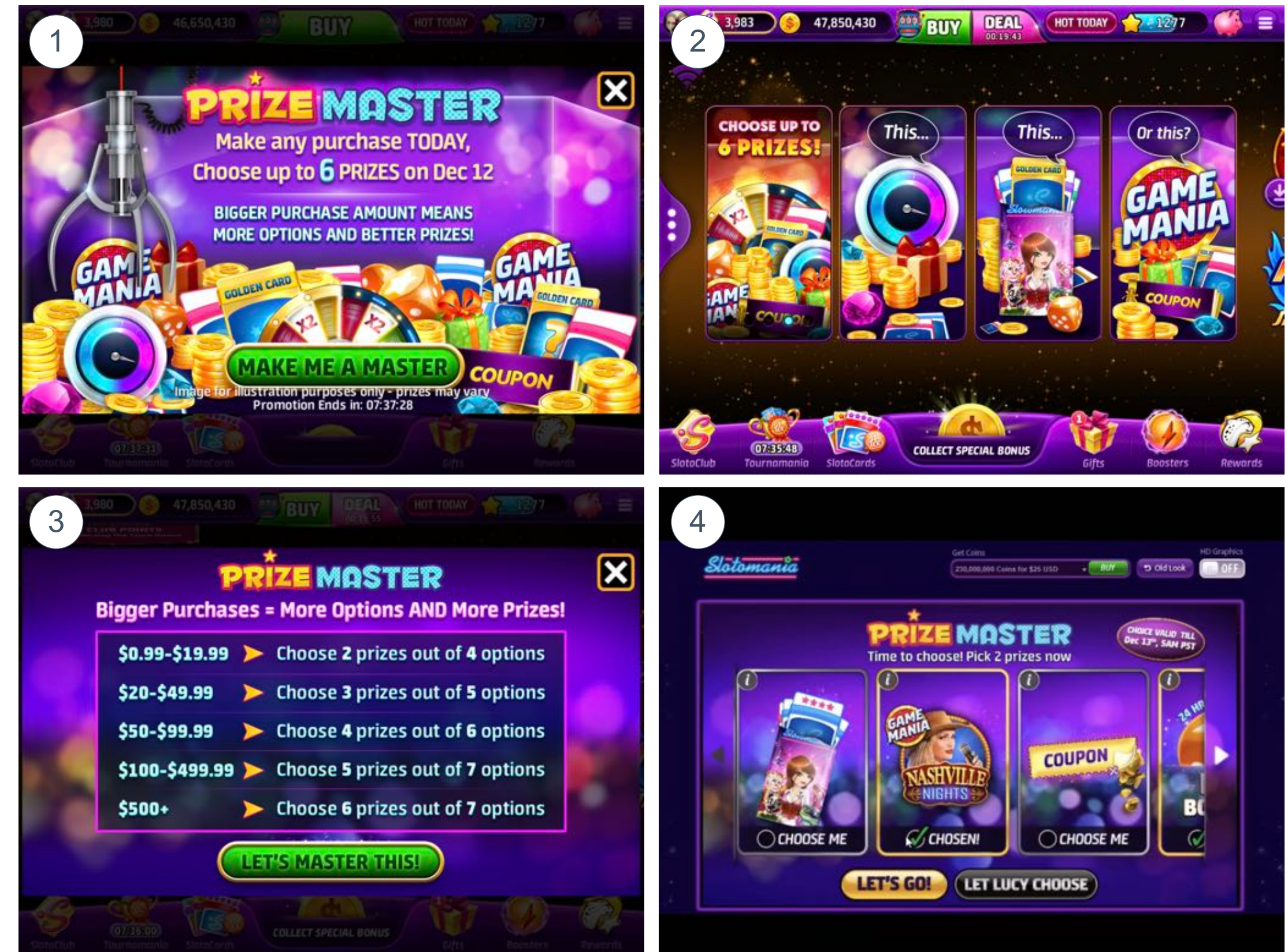
- Release: 12/10/17
- KPI: Revenue
- Target player: All players

Related features:

- [Choose 4 Days of Power-Up](#) - House of Fun
- [Pick & Play](#)- Slotomania (released late November 2017)
- [Choose Your Elf Reward](#) - Bingo Blitz
- [Unlock Special Packages](#) - DoubleU Casino

KEY TAKEAWAYS

- Make players *feel* like they receive a lot of value by adding additional gifts with each purchase. Then, provide players an option system to make the bonus customizable. Provide up to three options to make things easy for the player to decide...and to avoid [Analysis Paralysis](#)
- Add a post-purchase bonus that is *not* marketed to surprise and delight payers with something extra (see Slotomania's [Surprise Gift](#) as an example...although this is marketed prior to purchase, add something that surprises players and exceeds their expectations)



RECALL MINI GAME

WSOP released a card-based mini game tied to both play and purchase

- The feature is marketed with notifications in the lobby (1)
- Players are given a *Free Starter Pack*. Each card increases the award (2)
- Players collect cards by playing cash games or purchasing packs (3 & 4)
- Once 20 cards are collected, players pick five cards (5)
- Players may *collect* or *recall*. The first *recall* is free and the next *recall* costs \$10.99 (6)

- Release: 11/22/17
- KPI: Engagement, Revenue

Related features:

- [Twin Fire Match 'Em](#) - Hot Shot Casino
- [Memories of Oz](#) - Slotomania
- [Cards of Fate](#) - Hidden City Mystery of Shadows

KEY TAKEAWAYS

- Extend the integration of post-purchase mini games to both play and direct purchase to drive engagement and revenue. After the first part of the feature has been successful, consider a second release of one component (such as the game-play aspect)
- Build out a UI/UX with cards that is reusable for new card-based mini games to amortize the development cost over many different mini games (also see Key Takeaways from Memories of Oz - Slotomania in the [December 2017 Slots Design Report](#))



MARKET WATCH

11/12/17 – 12/11/17

TOP GROSSING 1 – 15

App	Notable Changes	More Information
Big Fish Casino	<ul style="list-style-type: none">• Messaging improvement: Players may now share device photos in messages (see New Innovations for details)	<ul style="list-style-type: none">• Share Photos with Friends
Heart of Vegas	<ul style="list-style-type: none">• Scratcher-card event: Scratcher card awarded to players for big wins on <i>Lightning Link</i> machines	<ul style="list-style-type: none">• Lightning Strikes Twice
House of Fun	<ul style="list-style-type: none">• Raffle event: Players must purchase raffles to win a <i>24 Hour Super Pack</i> of feature boosts, free spins, sneak peeks, and mystery gifts	<ul style="list-style-type: none">• The Whole Shebang
GSN Casino	<ul style="list-style-type: none">• Classic Blackjack room added: Blackjack also includes side bets	<ul style="list-style-type: none">• Classic Blackjack
Slotomania HD	<ul style="list-style-type: none">• Event with challenge options: Players pick the challenge machine or “Let Lucy Pick”• Facebook Live with Max & Lucy: Max is an actor and Lucy is an animated character• Event with purchase options: Lets players select the prize awards (see Live Ops for details)	<ul style="list-style-type: none">• Pick & Play• Facebook Live Cast• Prize Master
Jackpot Party HD	<ul style="list-style-type: none">• New Daily Bonus Wheel: Mini stepper machine shows combination of rewards	<ul style="list-style-type: none">• New Daily Bonus Wheel
Wizard of Oz	<ul style="list-style-type: none">• Play-to-collect card system: Players spin to collect cards and fill albums. Completing albums awards coin prizes	<ul style="list-style-type: none">• Lucky Cards
Cashman Casino	<ul style="list-style-type: none">• VIP status awarded after purchase: Coin bonus given after purchase based on tier. Likely VIP/Rewards system coming soon	<ul style="list-style-type: none">• Concierge Club
Quick Hit Slots	<ul style="list-style-type: none">• Event with <i>Deal or No Deal</i> mechanic: Players are given an option to collect or keep playing for a bigger prize• Team event: Players pick a team, then win coins to help their team win	<ul style="list-style-type: none">• Stack of Ornaments• Pick Your Team

TOP GROSSING 16 – 45

App	Notable Changes	More Information
Hit it Rich	<ul style="list-style-type: none">• Achievement system with trophies: Players are given achievements with different levels• Complete challenges to win a jackpot: Players unlock a room with a promo code found on Facebook. Players must complete challenges to progress and unlock a jackpot (see Surprise & Delight for details)	<ul style="list-style-type: none">• Trophies• Sin City Strip
Scatter Slots	<ul style="list-style-type: none">• New UI: Chests, Bonus, and Profile buttons added to map• Event with wheel: Awards free wheel spin with three ring options to choose from based on risk/reward preference (see Surprise & Delight for details)	<ul style="list-style-type: none">• New UI• Dragon's Gold Day
Classic Vegas Casino	<ul style="list-style-type: none">• Challenge mode added• Retention and play mechanic added: <i>Snakes & Ladders</i> game. Players earn dice from logging in and completing quests	<ul style="list-style-type: none">• Thanksgiving• Snakes & Ladders
Wonka Slots	<ul style="list-style-type: none">• Play to collect to unlock content feature: Players collect <i>Eggs</i> by playing machines to unlock exclusive content and enjoy additional benefits in <i>Golden Mode</i>• Challenges feature released: Players complete challenges to earn credits, <i>Wonka Bars</i>, and more	<ul style="list-style-type: none">• Player's Choice World• Golden Mode• Charlie's Challenges
POP! Slots	<ul style="list-style-type: none">• Black Friday Sweepstakes with Amazon gift card prize	<ul style="list-style-type: none">• Black Friday Sweepstakes
Jackpotjoy Slots	<ul style="list-style-type: none">• Challenges released	<ul style="list-style-type: none">• Events
Viva Slots Las Vegas	<ul style="list-style-type: none">• \$10K Giveaway with real money to collect player's email	<ul style="list-style-type: none">• 10k Giveaway
Old Vegas Slots	<ul style="list-style-type: none">• New VIP room: Open to <i>Black Diamond</i> level players and above	<ul style="list-style-type: none">• VIP Room

BINGO & POKER TOP GROSSING

App	Notable Changes	More Information
Bingo Blitz	<ul style="list-style-type: none">• Duplicate collection items wheel: In the <i>Jingle Blitz</i> collection, players may use duplicates to trigger a spin of <i>The Magic Wheel</i>• Join/share Inventory with friends feature: Option button in friends menu to join a friend or see their inventory	<ul style="list-style-type: none">• The Magic Wheel• New Friends Feature
Bingo Bash	<ul style="list-style-type: none">• Event mini-game: Daub 40x to play a mini game	<ul style="list-style-type: none">• Flip & Match
Bingo Party	<ul style="list-style-type: none">• New bingo style: Room offers Pac-Man style bingo play	<ul style="list-style-type: none">• Pac-Snowman
Bingo Pop	<ul style="list-style-type: none">• New daily bonus wheel	<ul style="list-style-type: none">• Spin the Wheel
Bingo!	<ul style="list-style-type: none">• Watch-to-Earn added for a free <i>Mega Scratch</i> (see Surprise & Delight for details)	<ul style="list-style-type: none">• Watch to Earn Scratcher
WSOP	<ul style="list-style-type: none">• Mini game triggered by play and purchase (see New Innovations for details)	<ul style="list-style-type: none">• Poker Recall
Poker Heat	<ul style="list-style-type: none">• Personal VIP Agent with Facebook Messenger sign-up (see New Innovations for details)• New retention wheel: Wheel now available every 20 hours after 10 hands played• Friends and gifting added: Players may now find and play with friends. Ability to send friends gifts available• Bonus awarded during bad beats (see Surprise & Delight for details)	<ul style="list-style-type: none">• Personal VIP Agent• Mega Bonus Wheel• Gifts• Bad Beat Bonus
Pokerist	<ul style="list-style-type: none">• New tournament format: Three players compete for chance to win a jackpot (see New Innovations for details)	<ul style="list-style-type: none">• Boost Poker

GAME TEARDOWN: ELLEN'S ROAD TO RICHES SLOTS

GAME SUMMARY

DoubleDown Interactive Ellen's Road to Riches Slots released with a subscription that innovates on an *Idle Games* economy system

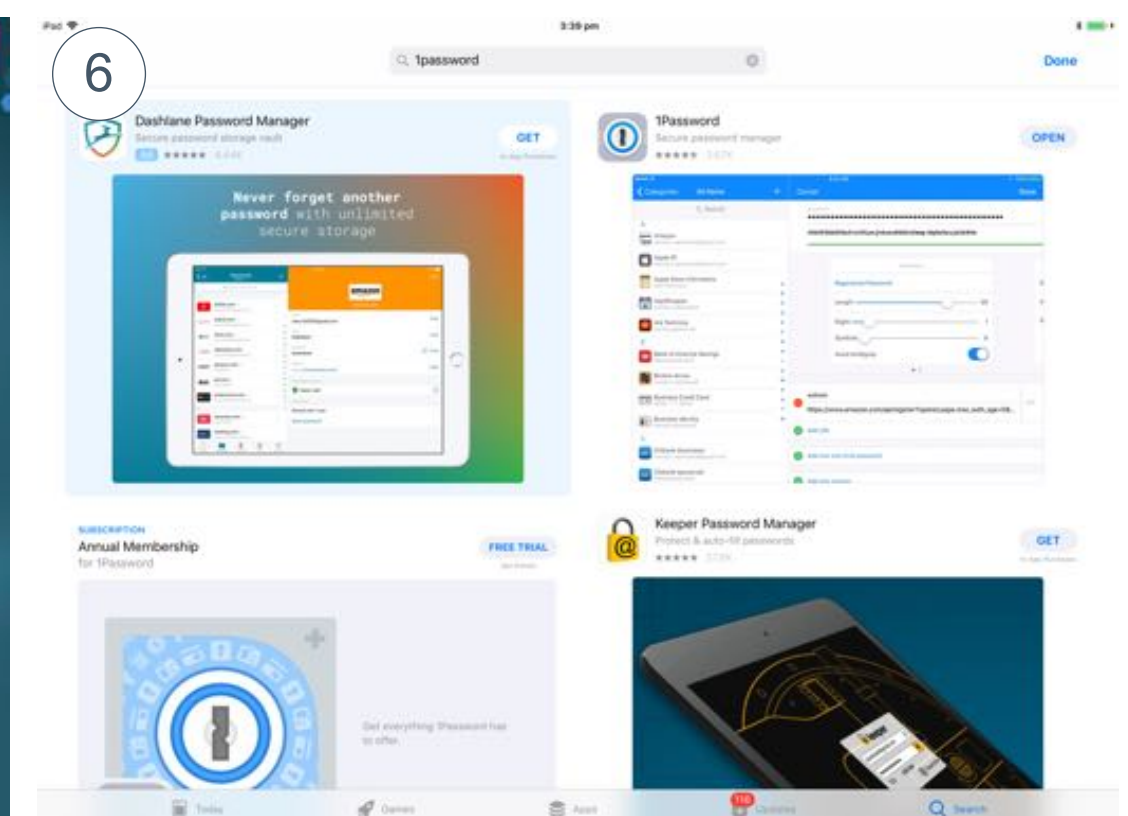
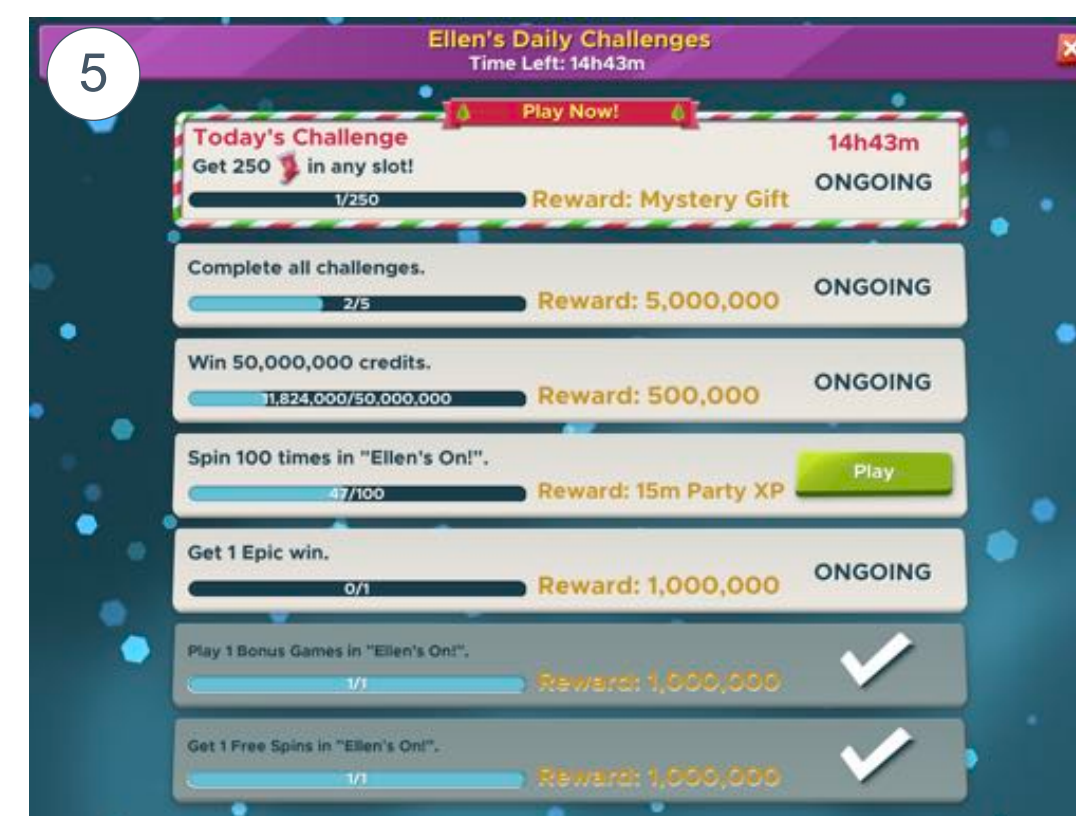
- After L15, a free 3-day trial of the *Piggy Bank* subscription unlocks. The bank fills with coins at a fixed rate *and* with every spin. Players may collect the bank every 6 hours. The bank holds up to 50M credits at L1. This amount increases by 1.5M every level. The subscription is available for \$4.99/month and auto-renews (1 & 2)
- There is a 2 hour retention bonus. Collecting 6 bonuses unlocks *Party XP*, which doubles XP for a certain time. The time is based on VIP level (3)
- Players may sign up with their email for a chance to see *The Ellen Show* (4)
- There is a timed daily challenge system (5)
- Collections unlock at L35 with a puzzle piece collection for each machine

Related features:

- [VIP Subscription](#) - Legendary Game of Heroes
- [Membership Elite](#) - Bingo Blitz
- [Piggy Bank](#) - Slotomania

KEY TAKEAWAYS

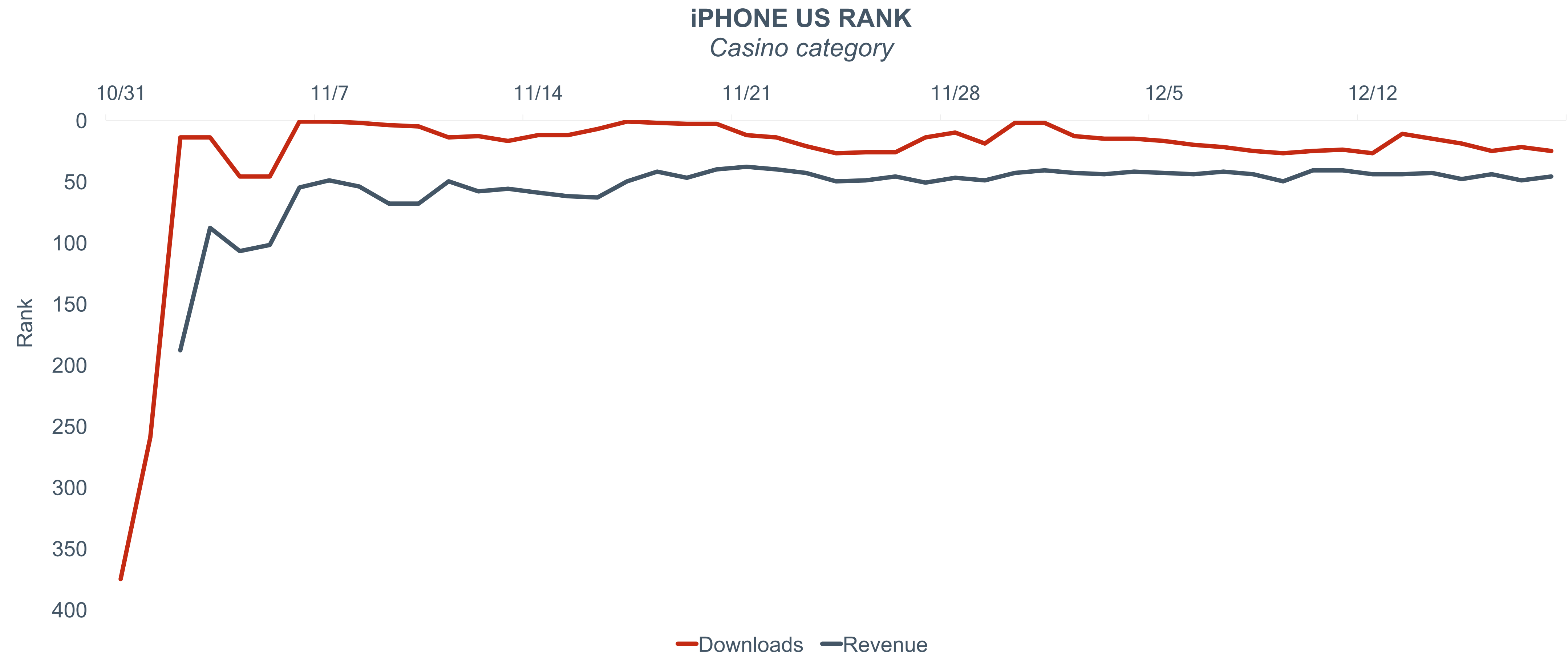
- Subscriptions may soon receive their own iOS Store card (a search of “1Password” in the iOS Store returns the 1Password app *and* a Free Trial Card for 1Password Annual Membership). See image (6)
- *Idle Games* style economy includes: Chip creation while not playing, with stronger chip creation while playing. This GDC talk details how to drive strong retention and monetization with this mechanic ([Idle Games: The Mechanics and Monetization of Self-Playing Games](#))
- Be careful with subscriptions. Because the LTV of each player ranges dramatically, a fixed monthly price subscription *could* massively cannibalize current revenue, if not implemented correctly



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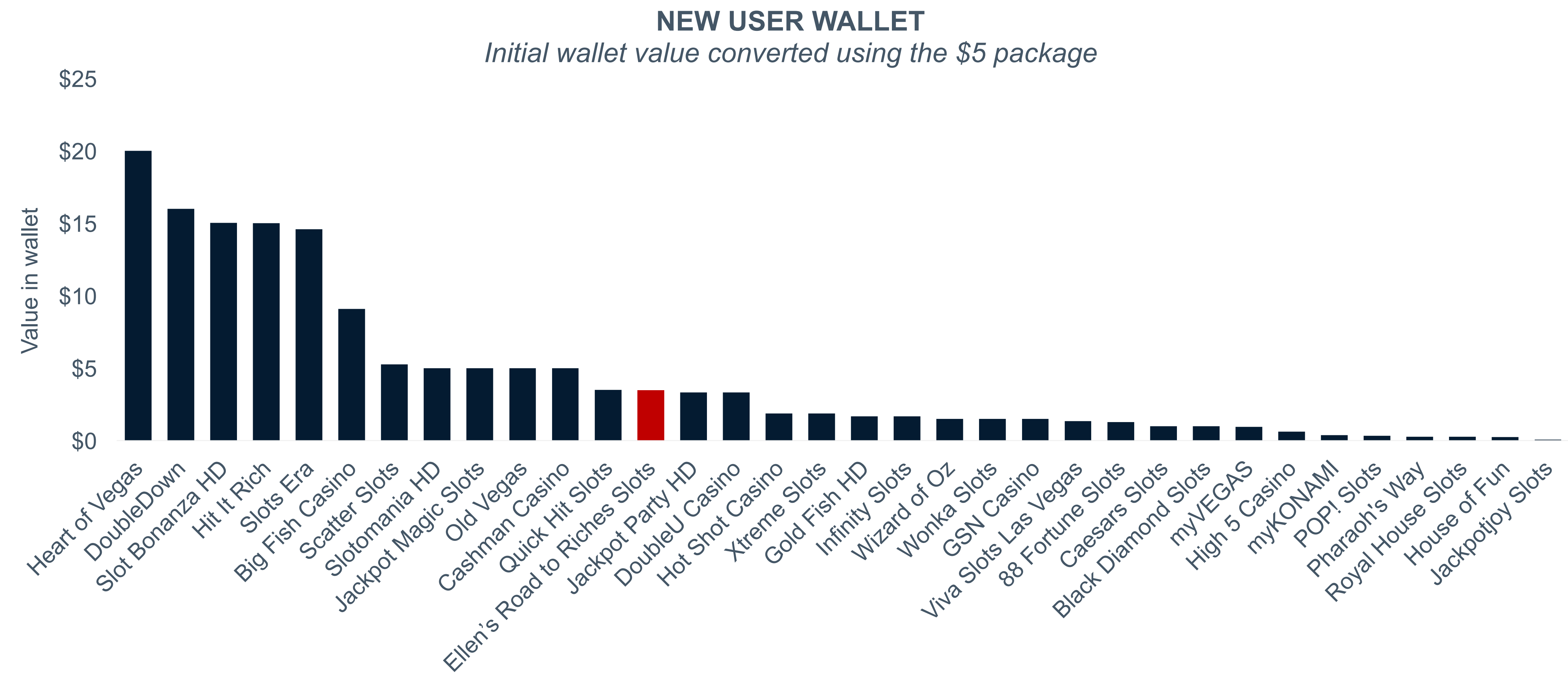
RANKING

Ellen's Road to Riches Slots hard launched at the end of October and jumped into the top 50 grossing. It is now the 45th grossing US iPhone Casino category game. Downloads rank is in the low 20s



NEW USER WALLET

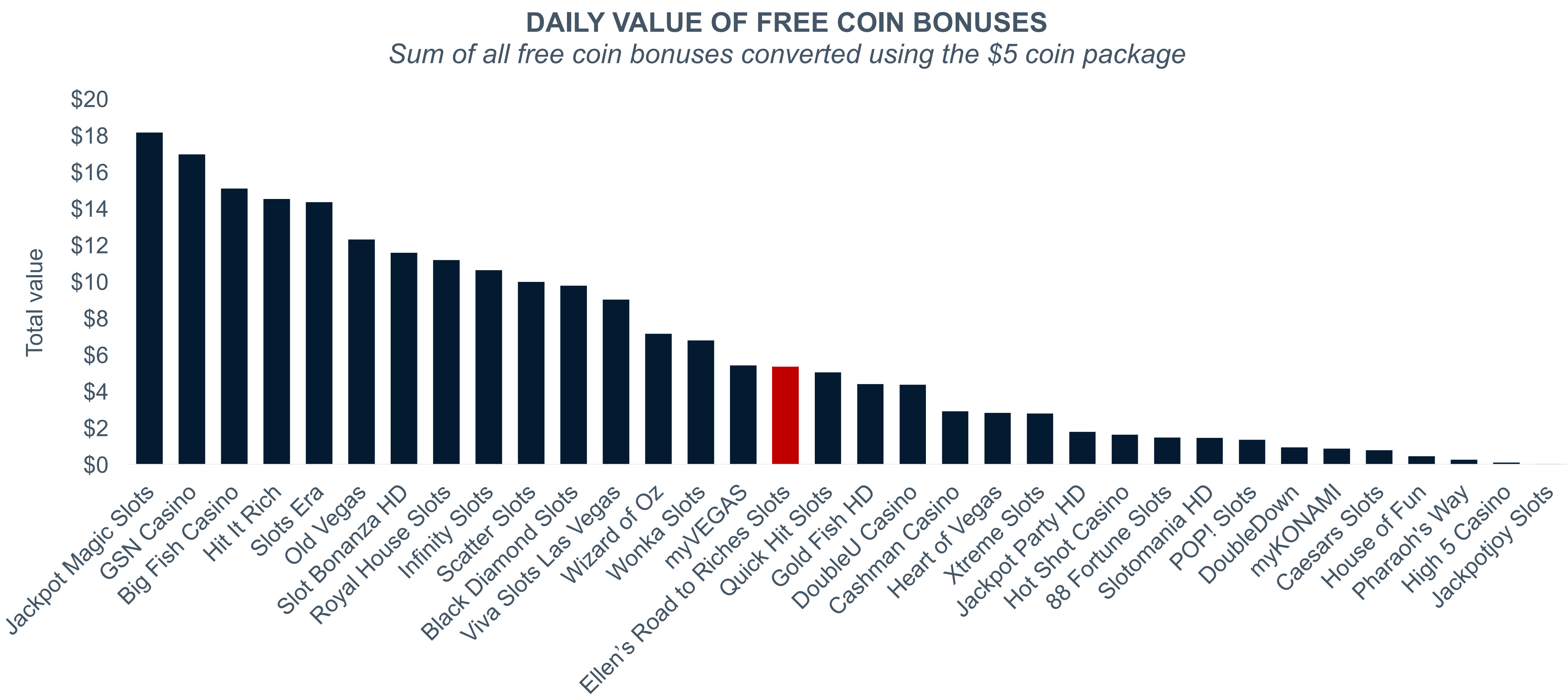
Ellen's Road to Riches Slots gives new users an average amount of coins, relying on the level-unlocked machines and meta-features, and IP to drive retention



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

DAILY VALUE OF FREE COIN BONUSES

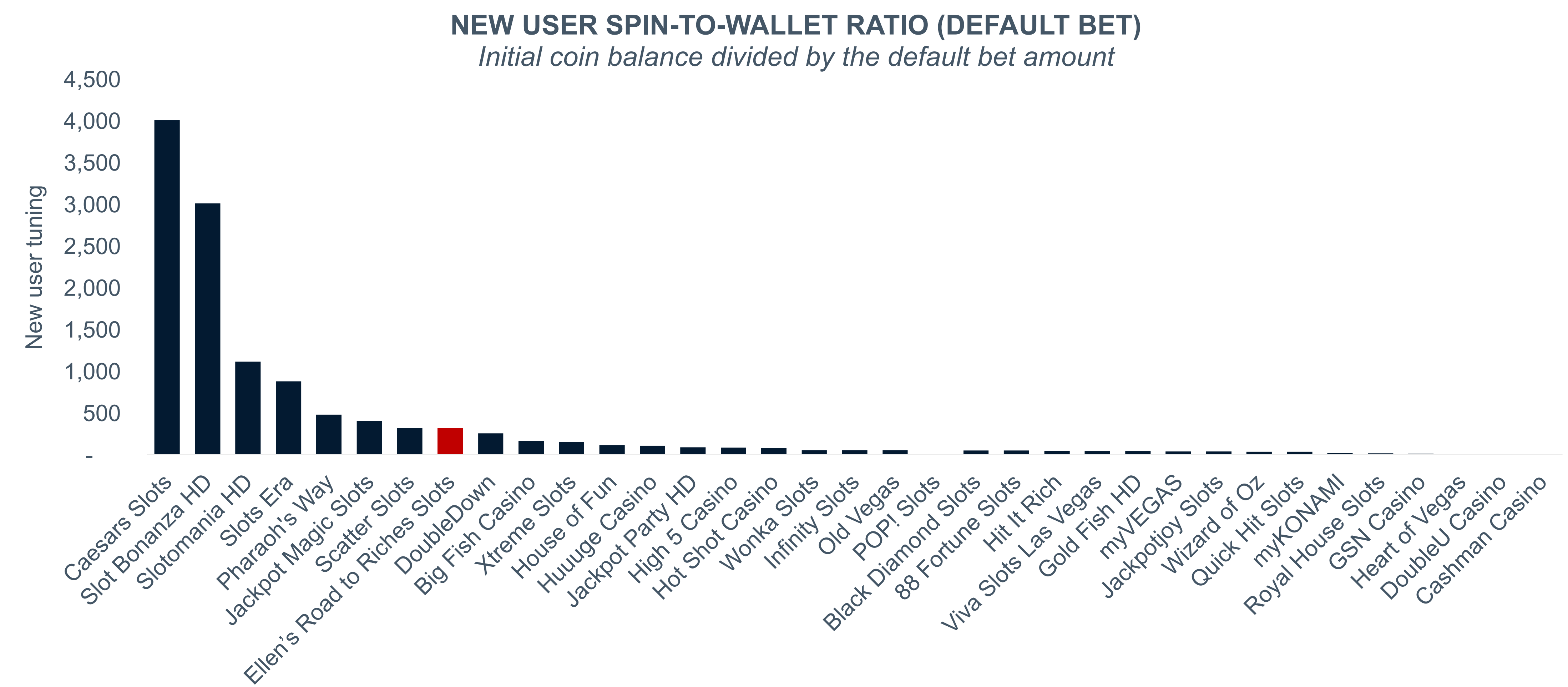
There is only one free coin bonus that is available every two hours and gives out an average amount of coins daily



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

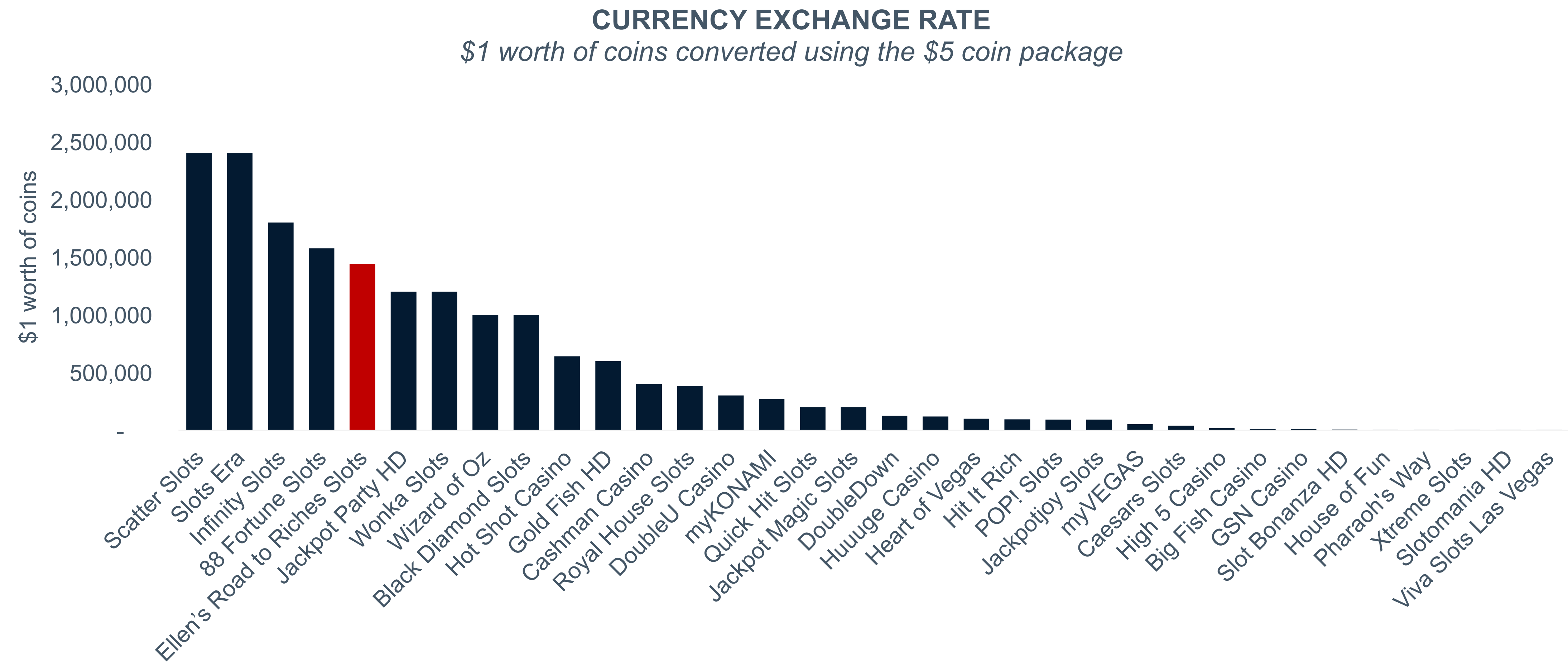
NEW USER SPIN-TO-WALLET RATIO

Players receive an above average spin-to-wallet ratio at the default bet with 313 spins upon install. The default and minimum bets are the same for new users in Ellen’s Road to Riches Slots



CURRENCY EXCHANGE RATE

The currency exchange rate in Ellen’s Road to Riches Slots is fairly inflated: players receive 1.44M coins for every dollar spent at 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 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.

“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

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