



Slots Design Report

Competitive Research and Data Insights for Slots Designers

TABLE OF CONTENTS

MARKET INSIGHTS

3

L&G Slots User Personas (NEW)

NEW INNOVATIONS

6

Machine Card Collections
Respin Stacks

KEY TRENDS

13

Board Games
Latest IPs
Base Game Features

MARKET WATCH

17

Notable Releases I & II

APPENDIX

20

Slots Product Council

NOVEMBER

2018

MARKET INSIGHTS



L&G SLOTS USER PERSONAS

Liquid and Grit partnered with Kinrate Analytics, a team of professors specialized in gaming user personas, to combine our product expertise with their user insights proficiency. Together, we created the most actionable and insightful Personas on mobile & online slots players

Research Methodology

- Conducted a literature review on earlier studies about gambling and online slots playing behavior to develop a motivations-to-play online slots scale
- Used the grand theory Self-Determination Theory (SDT) to consider both intrinsically and extrinsically oriented player motivations towards online slots
- Built in-depth player motivations by constructing player types and predicting patterns of habitual game choices by players
- Added relevant, product-specific questions formulated by Liquid and Grit to make the User Personas more applicable for product owners

Data Collection Overview

- Survey targeted only respondents who reported playing online slots
- A 51-item inventory was developed to examine online slots player motivations
- The survey data was collected by an international market research company
- The final, cleaned sample consisted of 1,299 respondents (mean age 34.5, 57% female, ages 18–76, U.K. n=818 and U.S. n=481)



L&G SLOTS USER PERSONAS

The research established five Online Slots User Personas with four explanatory motivation factors: *Glory, Arousal, Escape, and Profit*. A snapshot of the User Personas is below and a separate Q4 Slots User Personas Report will be available by subscription later this year. [Email us](#) for more information

	Fame Frank	Money Mike	Daydreamer Denise	Gambler Gale	Sensation Serena
Demographics					
Size	0.2	0.2	0.3	0.2	0.1
Women	0.5	0.5	0.7	0.6	0.5
Age (mean)	32.4	34.3	35.5	35.2	35.2
Motivations					
Glory	1.2				0.9
Arousal			0.4	0.9	0.7
Escape	0.3		1.1		
Profit		1.4		0.7	
Play Characteristics					
Online Slots Interest	3.1	3.0	3.3	3.6	3.8
Money Spent	4.2	4.9	3.5	5.4	5.8
Play Time	5.0	4.5	5.0	4.9	6.5

NEW INNOVATIONS



MACHINE CARD COLLECTIONS

MECHANIC ANALYSIS

House of Fun *Gaze of Fortune* is the first machine in a *Card Collection Game Series* called *Monsterpedia*. These machines all incorporate the same collection feature within the machine design

Collection Feature Details

- Certain spins randomly award *M Coins* (1)
- *M Coins* are used to purchase *Card Packs* (2)
- *Cards* complete *Sets* that award mystery prizes or free spins (3)
- Duplicate *Cards* add credits to the *Set* award (4)
- Completing *Sets* finish *Albums*, which award free spins (5)

Additional Feature Details

- *Card Packs* can be randomly awarded during play
- Progression of the *Monsterpedia Collection* is linked between *Game Series* machines
- Triggering the *Monsterpedia Collection* takes players out of the current machine and into the *Monsterpedia Free Spins* ([video](#))
- *M Coins* can be earned during free games
- Players restart a page in the *Album* after it is completed

Related Machines

- [Evolving Dragons](#) - Caesars Slots
- [Monster Treasure](#) - Caesars Slots
- [Farming Fortunes](#) - Caesars Slots

Gaze of Fortune



INSIGHTS & ADVICE

As players increase their understanding of social casino games, match their knowledge with more complex meta-game mechanics. To be safe, layer on complexity so as not to overwhelm players ... while still capitalizing on engagement gains associated with more complex features

Target Persona Player Data

- Target player: *Daydreamer Denise*, *Sensation Serena*

How often you play games with these machines?

	Fame Frank	Money Mike	Daydreamer Denise	Gambler Gail	Sensation Serena
Collections	2.9	2.5	3.1	2.9	3.4
Bonuses include collecting items	3.3	3.1	3.4	3.4	3.9

Product Council Insights*

- Layered progression systems, such as *Cards > Sets > Pages > Albums*, increase retention by 1) pairing visual with actual progression, 2) making the early progression feel very fast by filling *Sets* quickly, and 3) obfuscating how close a player is to completion when progression slows down
- Adopt proven collection systems from players’ lives. This card collection system appears to be inspired by the *Panini World Cup* sticker collection albums ([more info](#))
- An involved add-on collection system requires players to do a certain amount of ‘work’. This resonates with *Daydreamer Denise* and *Sensation Serena* players. It gives them a sense of *arousal* when they accomplish a task and an *escape* when they are rewarded with a prize. For players not interested in ‘accomplishing a task’, like *Fame Frank* and *Money Mike*, clearly set the work required upon machine-entry with an informative lobby card and marketing
- Tune the payout of the secondary currency to land on nearly all spins, creating the illusion of more action and excitement than reality from the machine payouts
- Award for duplicates to ensure that players ‘almost there’ are still rewarded for engagement ... and that the card randomness feels authentic

* The Product Council is comprised of top slots consultants in social mobile gaming. For more information on the members, see the [Appendix](#)

RESPIN STACKS

MECHANIC ANALYSIS

Caesars Slots' Scoops added to a *Lightning Link* respin mechanic with additional awards along the top of each reel set. When a reel fills with special symbols, the player receives the reel-specific award

Feature Details

- Five or more Scoops trigger a respin (1)
- During respins, Scoops drop, stack, and award another respin (2)
- Filling a reel with Scoops awards the prize above the reel (3)

Related Reports

- [Progressive RTP](#) - August 2018 Slots Design Report

Related Machines

- [Elephant King](#) - IGT (RMG)
- [King's Throne](#) - Caesars Slots
- [Year of The Dog](#) - House of Fun
- [Inferno Empress](#) - DoubleU Casino
- [Kong 8th Wonder of the World](#) - POP! Slots

Scoops



INSIGHTS & ADVICE

Add more excitement to the *Lightning Link* respin experience with near-miss awards ... such as additional bonuses, ‘almost there’ respins, and multipliers

Target Persona Player Data

- Target player: *Gambler Gail*, *Sensation Serena*, and *Daydreamer Denise*

How often you play games with these machines?

	Fame Frank	Money Mike	Daydreamer Denise	Gambler Gail	Sensation Serena
Video Slots	2.6	2.6	2.9	3.0	3.3
Features with respins	3.6	4.0	4.2	4.2	4.3

Product Council Insights*

- The stacked win in *Scoops*: 1) gives players more to root for than a traditional *Lightning Link* respin, and 2) increases the time players spend ‘almost there’ with near-misses ... an emotional *arousal* produced from a bingo card
 - See the [September 2018 Slots Design Report](#) for more insights on incorporating bingo mini-games into a slots machine
- Include prizes, like additional spins, when a player reaches a certain threshold of *Lightning Link* ... to challenge the player (and then provide harder thresholds). [Wild Howl Deluxe](#) in Caesars Slots, for instance, has six or more *Moon* symbols trigger three additional respins. If a player hits five *Moon* symbols, they are awarded an additional respin to hit the sixth
- Adding more visuals to *Lightning Link* machines is trending. Hit it Rich released a progress bar to a *Lightning Link* respins in [Wicked Defy Gravity](#) ... and, Aristocrat’s RMG machine showcased at G2E [FarmVille Mighty Cash](#) added a multiplier, which increased when all slots were filled during the respin
 - See the [October 2018 Slots Design Report](#) for our analysis of G2E 2018

* The Product Council is comprised of top consultants in social mobile gaming. For more information on the members, see the [Appendix](#)

KEY TRENDS



BOARD GAMES

While not a new mechanic, machines with board games are surfacing across both social and RMG (at G2E 2018). This month, Quick Hit Slots and Caesars Slots released machines with involved board games ... Scientific Games also incorporated one in the latest *Game of Life* machine at G2E

Product Council Insights*

- Board Games, like Monopoly or a simple complication map, are ideal for slots because successful board games are proven to retain players. The RMG versions place less future RTP in the board game to eliminate potential *vulturing* (this is when players wait for others to leave a machine). At G2E, KONAMI also invested in integrating proven games into slot machines

Recent Board Game Machines

- [Monopoly Party Train](#) from Quick Hit Slots (1)
- [Witchy Wonders](#) from Caesars Slots (2)
- [Game of Life](#) from Scientific Games (RMG machine from G2E 2018) (3)

Related Reports

- KONAMI section - [October 2018 Slots Design Report](#)
- Scientific Games section - [October 2018 Slots Design Report](#)



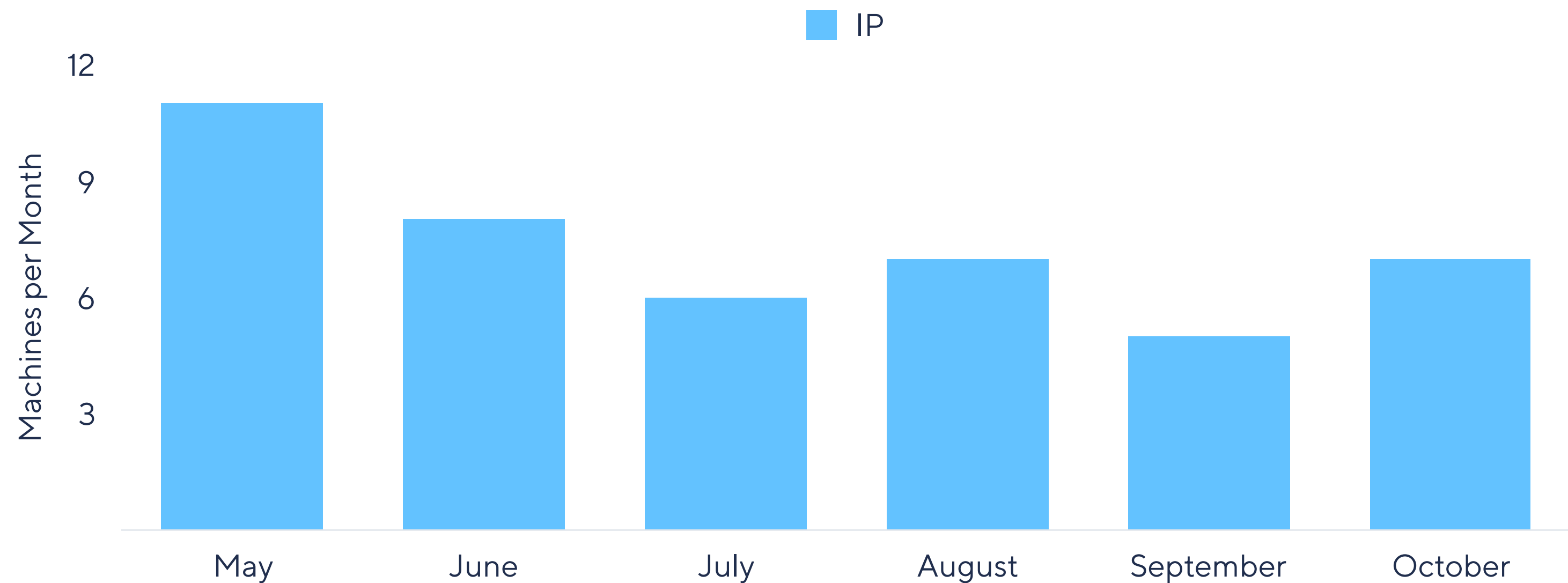
* The Product Council is comprised of top consultants in social mobile gaming. For more information on the members, see the [Appendix](#)

LATEST IPs

Purchasable IP continues to be a strategic play for larger companies to differentiate their product offering. Expect this trend to continue as mobile gaming moves more towards an industry dominated by larger companies. In the Q3 2018 financial report, Zynga revealed a *Game of Thrones* slots machine is coming soon ([more info](#))

Types of IP

- 1. Purchasable IP: Examples include *Wizard of Oz*, *Monopoly*, and *Iron Man*. This IP is established by other companies and licensed by slots creators
- 2. In-House IP: Examples include *Quick Hits*, *Lightning Link*, and *Buffalo*. Slots creators build up the IP and use it to market future games
- 3. Public Domain IP: Examples include *Snow White*, *Cleopatra*, *Red Riding Hood*, and Norse Mythology. This is IP that is a free to use, but also more commonplace



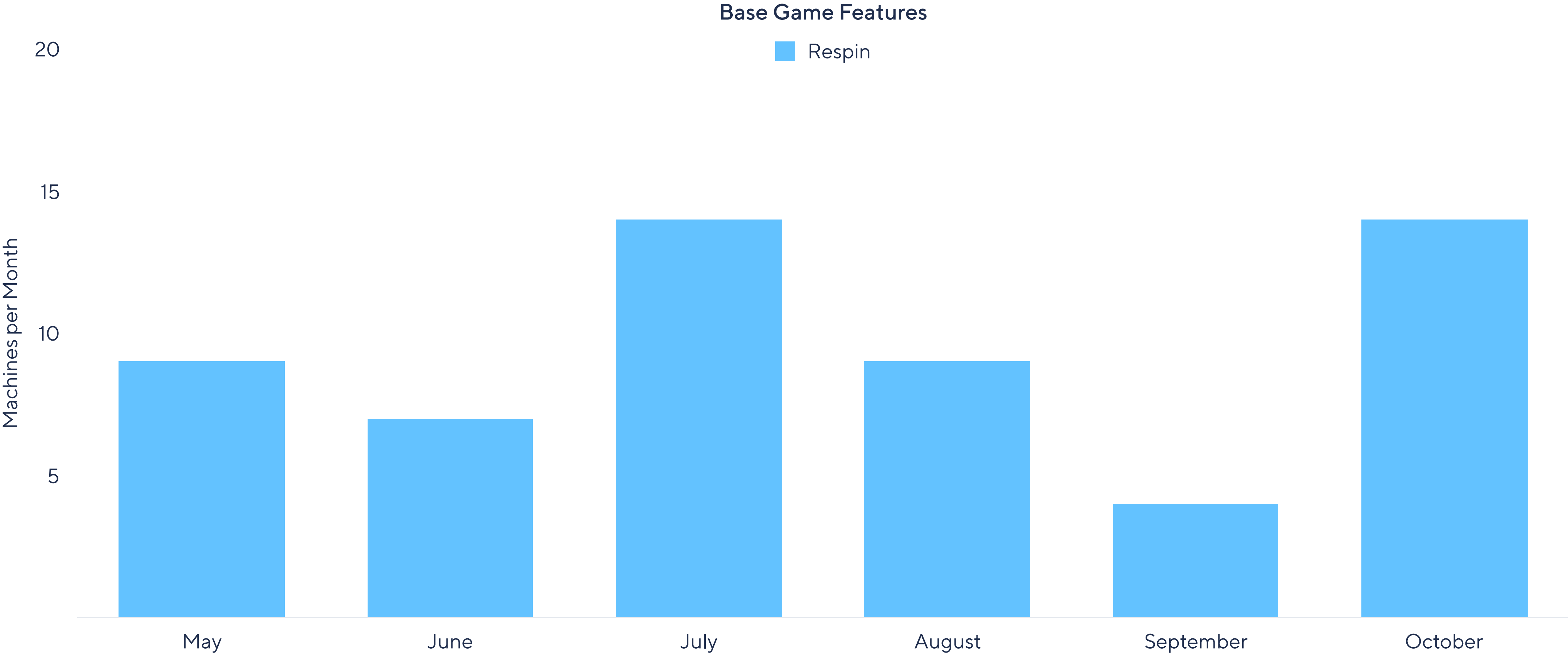
Monopoly Party Train



Kiss Destroyer

BASE GAME FEATURES

Lightning Link, and variations of the popular respin mechanic, continue to be prevalent in social casino ... driving up respins within the Base Game Features category



MARKET WATCH



10/1/18 – 10/31/18

NOTABLE RELEASES I

Publisher	Machine	Features
Slotomania	Unfortunate Monsters	Players spin, fill a meter, then raise <i>Monsters</i> for better multipliers and free spins (1)
Slotomania	Caterpillar Tale	In the free spins, a <i>Caterpillar</i> roams and grows. If the <i>Caterpillar</i> overlaps itself, wilds become 2x multipliers
House of Fun	Enchanting Brews	Winning combinations with a special symbol landing on reel six triggers the <i>Bubbling Brews Feature</i> . Players pick a winning symbol from reel one, converting symbols to the chosen symbol for additional pays (2)
POP! Slots	Fire vs Lightning	A stepper machine with <i>Lightning Link</i> respins and additional bonuses for triggering respins 10 times (the social bonus is a reskin from Pirates' Gems) (3)
DoubleU Casino	Spooktacular Kitty	Landing five <i>Golden Pumpkin Kitties</i> triggers an on-reel pick'em for multiplied wins or free spins



NOTABLE RELEASES II

Publisher	Machine	Features
Caesars Slots	Wild Howl Deluxe	Five <i>Moon</i> symbols award a single respin. Hitting another <i>Moon</i> triggers the <i>Howling Respins</i> (reskin of Wild Howl with addition of one-away respin) (1)
Quick Hit Slots	Amaluna Cirque Du Soleil	Three bonus symbols trigger the bonus wheel for credits, respin feature, or two different free games bonuses (this premiered at G2E 2017) (2)
Classic Vegas Slots	Rapid Hit Fever	The bonus game is a scratcher-like setup. When three matching cards are uncovered, the corresponding free spins is awarded (similar to the RMG machine Quick Hit Platinum Hit) (3)
Pokerist	Wild Monster	During the base game, a full-reel wild shifts left one reel each spin
Slingo Arcade	Pay of the Dead	Two bonus symbols give players the option to purchase a single-reel respin to try to trigger the bonus

[Click here for a full list of machines released](#)



APPENDIX



SLOTS PRODUCT COUNCIL

These industry-leading slots experts strengthen the Insights & Advice sections included in each Report

Arthur Lee	Joe Kisenwether
<p>Game Design and Math Innovator Consultant</p> <p>LinkedIn Profile</p> <p>Arthur Lee is a leading slots consultant in social casino.</p> <p>Prior to going independent, Arthur was a Game Designer at Playtika for two and a half years. At Playtika, he headed the innovation of <i>Lightning Link</i>-type games with <i>Fairy Bliss</i>, <i>Lady Havana</i>, and one of the best performing games at House of Fun, <i>City of Queens</i>. Arthur designed record breaking titles such as <i>Frankenbride</i>, <i>Lady Hotness</i>, <i>Giant's Treasure</i>, and <i>Beast</i>.</p> <p>Before making an impact in the social mobile market, Arthur was a Senior Mathematician in RMG at American Gaming Systems (AGS) and KONAMI Gaming.</p> <p>He combines his experience of land-based slots with the lack of regulation in social games to provide the most competitive games in social and real money gaming.</p>	<p>Mathematician and Game Design Consultant</p> <p>LinkedIn Profile</p> <p>Joe Kisenwether is an award-winning game designer and mathematician.</p> <p>Joe is a 20-year veteran of the casino and online gaming industry. He spent eight years at Bally's as a Senior Mathematician and also worked for GameTech and Gaming Laboratories International before going independent and founding Craftsman Gaming in 2012.</p>

“If you invest in beauty, it will remain with you all the days of your life”

– Frank Lloyd Wright

LiquidandGrit.com



Brett.Nowak@LiquidandGrit.com

