



LIQUID AND GRIT

Social Casino Product Report

Competitive research and actionable product recommendations

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MAY

2017

INTRODUCTION



“We always overestimate the change that will occur in the next two years and underestimate the change that will occur in the next ten. Don't let yourself be lulled into inaction” - Bill Gates, The Road Ahead

In ten years, there will still be slots, poker, bingo, and other casino games. People will still seek ways to be happy, social, and entertained. What are you working on today that will be impactful then? What bold projects will disrupt the competition to become the new way for the industry?

In the meantime, we have short-term roadmap features to pursue: Hot Shot Casino released a mini game to increase bet per spin. Hot Shot Vegas generated conversions in new moments and then increased revenue per payer with a follow-up offer. And, DoubleU Casino released a weekly event board to increase retention with predictable live ops events.

To bring you more valuable information, we are working with Sensor Tower to identify the latest breakout social casino apps. Playtika's Poker Heat, while not a new app, is on track to break into the top 30 iPhone US casino grossing. You will find key features and economy details in the Economy Teardown section.

Don't be lulled into inaction.

Brett Nowak

Editor-in-Chief

NEW INNOVATIONS

NEW INNOVATIONS

Feature	KPIs	Recommendations
Spin Mini Games	<ul style="list-style-type: none">• Increase bet per spin	<ul style="list-style-type: none">• Increase bet per spin with a mini game that warns players that their progress resets upon leaving a machine or changing a bet
Respin Purchases	<ul style="list-style-type: none">• Drive conversion• Increase revenue per payer	<ul style="list-style-type: none">• Convert players with smaller packages at new times: after free spins and/or after a play session. Then, increase revenue per payer with more meaningful follow-up offers
Weekly Event Boards	<ul style="list-style-type: none">• Improve retention	<ul style="list-style-type: none">• Use an event board to retain players with specific events only on certain days of the week
Retention Polish	<ul style="list-style-type: none">• Improve buy-page conversion• Ensure whale retention• Improve retention	<ul style="list-style-type: none">• Unlock packages with a purchase and add more relevant text to the buy-page• Treat whales to 24/7 chat support• Test Timeline stories

SPIN MINI GAMES

Increase bet per spin with a mini game that warns players that their progress resets upon leaving a machine or changing a bet

- Upon app-entry in Hot Shot Casino, the *Boardwalk Bonanza* mini game appears with nine cards (image 1).
- Two cards are selected and flipped every turn. Matched pairs are removed from the board and mismatched cards remain in play (image 2).
- Additional turns are earned by spinning and filling a meter during play. The fill meter is located on the right of the screen and expands to display progress, turns, and days left (image 3).
- Clicking the 'Home' button to leave the machine OR changing the bet amount prompts a 'warning' dialogue. This message notifies players that the machine's mini game resets (image 4)
- There are three stages of *Boardwalk Bonanza*, each with prize amounts based on machine play. The current stage prize is displayed at the top of the mini game board (image 5).
- Stages are completed after finding a symbol on the last remaining card. In this example, \$1.41 worth of coins was won for completing the first stage (image 6).



RESPIN PURCHASES

Convert players with smaller packages at new times: after free spins and/or after a play session. Then, increase revenue per payer with more meaningful follow-up offers

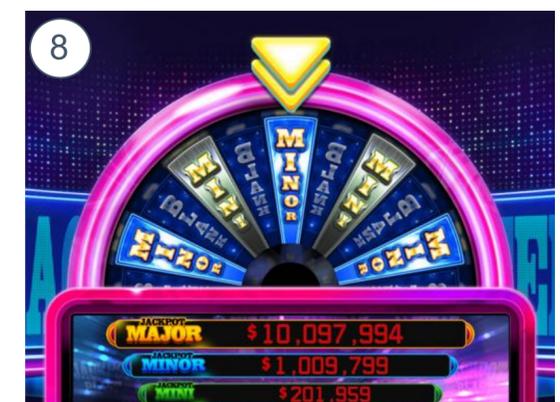
- On app-entry in Hot Vegas Slots, a dialogue appears for a coin package with a *Respin Your Free Spins* feature (image 1).
- Players follow the iTunes payment flow to complete the purchase (image 2).
- A dialogue displays the amount of coins, club points, and VIP points awarded after purchase (image 3).
- A 'Re-Buy' dialogue appears with '25% Free' on any purchase made within 24 hours (image 4).
- The *Respin Your Free Spins* option appears at the end of every free spins for one hour after purchase. 'Respin' and 'Continue' choices are provided (image 5).
- Clicking the 'Respin' button triggers the free spins dialogue and the 'Spin 'Em' button (image 6).
- The *Respin Your Free Spins* concludes by displaying the amount won (image 7).
- *Respin Your Free Spins* is only available once for each free spin.
- When leaving a machine, a dialogue appears stating, "Recoup Your Losses" with the total chips lost during play (image 8).



WEEKLY EVENT BOARDS

Use an event board to retain players with specific events only on certain days of the week

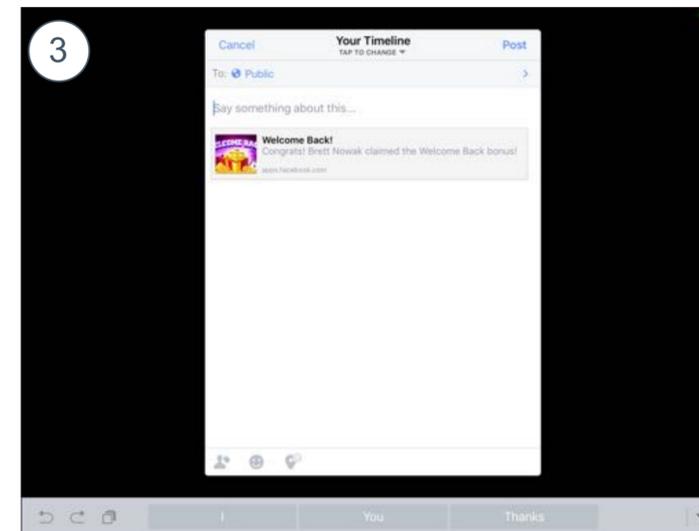
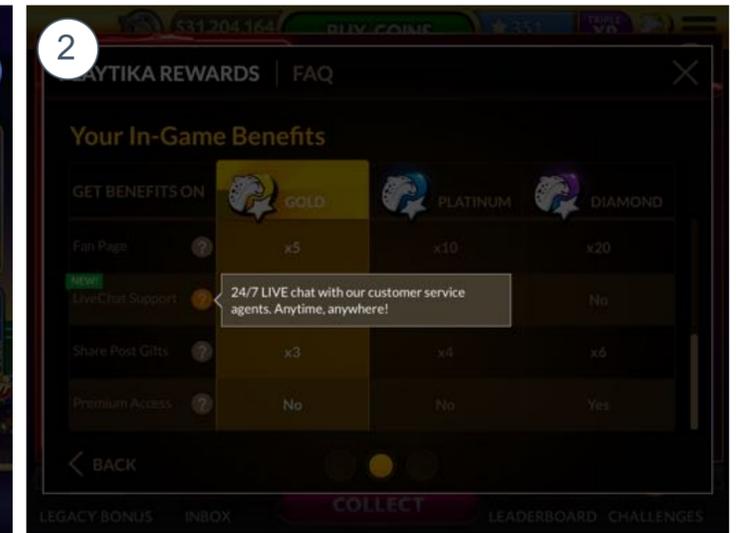
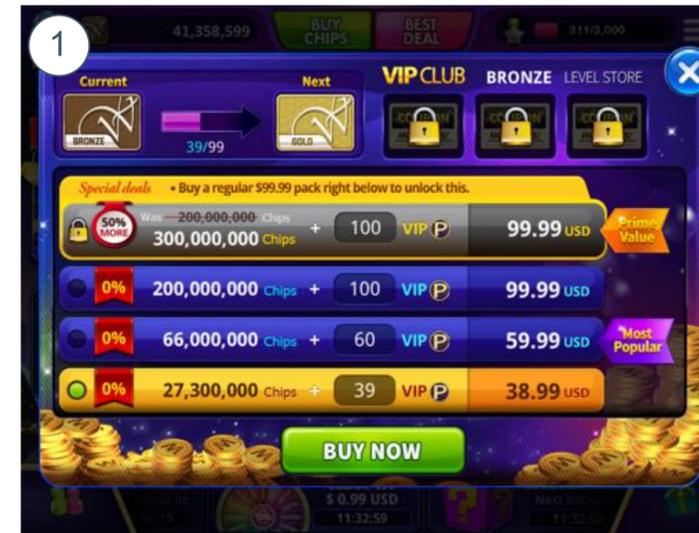
- DoubleU Casino's *Weekly Bonanza* icon is in the main lobby (image 1).
- Tuesday's event, the *Gigaplier Wheel Meter Booster*, increases a fill meter to enable more frequent wheel spins. This benefit is exclusive to VIP member levels platinum and higher (image 2).
- Wednesday's event, the *Slotourney Prize Booster*, increases *Slotourney* prize amounts (image 3). The top ten players out of 100 are awarded a prize (image 4).
- Friday's event, a *Jackpot Tourney*, is held with new machines every week (image 5). There are a set number of jackpots available for all players to win. One less symbol than normal is needed to hit a jackpot in participating machines (image 6).
- Saturday's event, the *Jackpot Blast Wheel Party*, displays the 'Last Top 3 Winners' (image 7). Filling a meter during the *Jackpot Blast Wheel Party* awards a spin on the wheel (image 8). For more details on DoubleU Casino's wheel see the April 2017 Social Casino Product Report.



RETENTION POLISH

Unlock packages with a purchase and add more relevant text to the buy-page. Treat whales to 24/7 chat support. Test Timeline stories

- **Increase revenue with a buy-page option to unlock special packages:** In DoubleU Casino, players are shown a *Special Deal* that is unlocked with a \$99.99 purchase (image 1).
- **Provide 24/7 live chat to high value players:** In Slotomania, players at *Royal Diamond* level and above receive 24/7 live chat support with customer service agents (image 2).
- **Boost retention with Timeline story posts:** After receiving the ‘Welcome Back’ message in DoubleU Casino, players are shown a Facebook dialogue to post to their Timeline (image 3). Gold Fish Casino has offered this feature for a while now.
- **Increase buy-page conversion with more relevant messaging:** Big Fish Casino markets on Fridays, “Work’s done, time for fun! 4.5X Chips” (image 4).
- **Drive installs with continued exploration of referral programs:** In Zynga Poker HD, players may refer a friend via email, text, and other methods (image 5). Referrals were first released by Wizard of Oz—see the March 2017 Social Casino Product Report for details.
- **Decrease dropoff with informative and entertaining loading screens:** Big Fish Casino players experience a slot machine-like animation upon app-load. When returning to the app, a small message appears at the bottom of the screen notifying players that the app is loading (image 6).



LIVE OPS

LIVE OPS

Continue to push up prices for premium content.
Add surprise and delight machine hunts.
Increase conversion with more options

- **Drive up prices for premium content to generate more revenue:** In WSOP, the *Spring Tournament* costs \$30 to enter at the level 5 currency store (image 1).
- **Surprise and delight players with an in-app machine hunt:** The Wizard of Oz *Trivia Time* event challenges players to find and play the machine that answers the trivia question (image 2).
- **Convert a wider audience with more purchasing options:** House of Fun's *Challenge Run* allows players to pick the event that is triggered with a purchase (image 3).
- **Boost rebalances and sales with clear messaging:** In Slotomania's *Ready Set Go*, players clearly see the increase in *SlotoCards* awarded with each purchase (image 4).
- **Increase transactions per payer using surprise gifts with purchase:** *Surprise Me!* in Slotomania awards players with a surprise gift the day after a purchase (image 5).
- **Write effective headlines to increase CTRs:** Slotomania's *Be-A Billionaire* features an effective title with attention-grabbing words and large numbers for an otherwise simple event (image 6).



TRIPLE TREASURE QUEST

Use multiple stage challenge system events with frequent rewards to drive player engagement

- House of Fun's Puss' Triple Treasure Quest is a three-part challenge combined with a Spin City Challenge (image 1).
- The first step of the quest is to complete the *Spin City Challenge* (image 2).
- A dialogue appears when the *Spin City Challenge* portion has been completed, notifying players that prizes will arrive in the *Inbox* (image 3).
- Completing the first step awards a coupon. Instructions for step two are in the *Inbox* (image 4).
- The increased bonus collection prize is indicated by a coin icon at the bottom of the lobby screen (image 5).
- The second step of the quest triggers two bonus games and instantly awards 50x the qualifying bet, unlocking the last step (images 6 & 7).
- For the final step, players are instantly awarded additional coin prizes for each big win until the end of the challenge (image 8).



MARKET WATCH

4/15/17 – 5/14/17

NOTABLE FEATURES I

App	Notable features released
Jackpot Party	High roller room with leaderboards (see following pages for details)
House of Fun	Scratcher pack awarded with a purchase (image 1). Multiple-stage challenge system: <i>Puss' Triple Treasure Quest</i> (see Live Ops section for details)
Slotomania	Last week to earn <i>SlotoCards</i> (image 2). New <i>Snakes & Ladders</i> progression system was released 5/16
DoubleU Casino	Event board with specific events only on certain days of the week (see New Innovations section for details)
Wizard of Oz	Tournaments with a rank meter (image 3)



NOTABLE FEATURES II

App	Notable features released
Hot Shot Casino	Spin mini game that incentivizes higher bet per spin (see New Innovations section for details)
Wonka Slots	Player profiles with gameplay stats shared through the <i>Loyalty Lounge</i> (image 1)
Infinity Slots	Challenge system now specific to each machine (image 2)
High 5 Casino	X-promotion to High 5 Vegas
myVEGAS Slots	New lobby UI with focus on sending and receiving gifts (image 3). Economy changes: new daily gift, higher daily spin wheel amount, and increased lobby bonus



NOTABLE FEATURES III

App	Notable features released
Viva Slots Las Vegas	High limit machines (image 1)
Pharaoh's Way	Collection progression system with pyramid fiction
Old Vegas Slots	Room dedicated to progressive jackpots (image 2)
POP! Slots	Wheel with additional awards added to purchase (image 3)



*There were no new notable features in poker or bingo apps

HIGH ROLLER ROOM

Add whale features that generate competition between high stakes players to increase revenue with a higher bet per spin

- Jackpot Party's *High Roller Colosseum* is open to players level 100 and up (images 1 & 2).
- Upon room-entry, a dialogue presents *High Roller Colosseum's* Medals and leaderboards (image 3).
- The colosseum is filled with machines. Each has a different timer, global leaderboard, and statistics scroll (image 4).
- Each machine also displays a machine-specific leaderboard, timer, and 'Win' challenge (image 5).
- Completing a challenge awards a medal for that battle (image 6).
- The total of all medals earned in battles are used for the rankings of the global leaderboard (image 7).
- A total medal count is visible at the top of the screen at all times. More detailed statistics are displayed in the scroll at the bottom of the main colosseum (image 8).



ECONOMY TEARDOWN: POKER HEAT

RANKING TREND

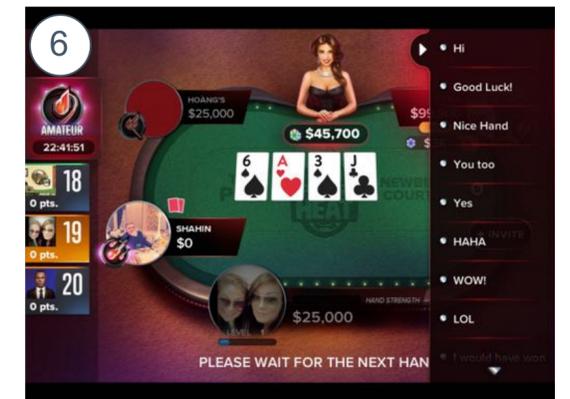
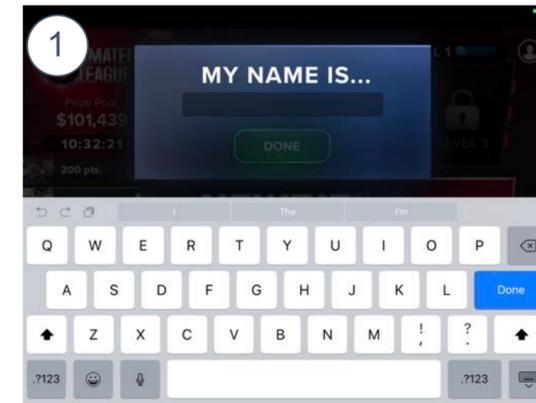
Poker Heat began climbing up the top grossing charts in early 2017 and is on track to break into the top 30 iPhone US casino grossing by July. Downloads follow a similar trend



FEATURES

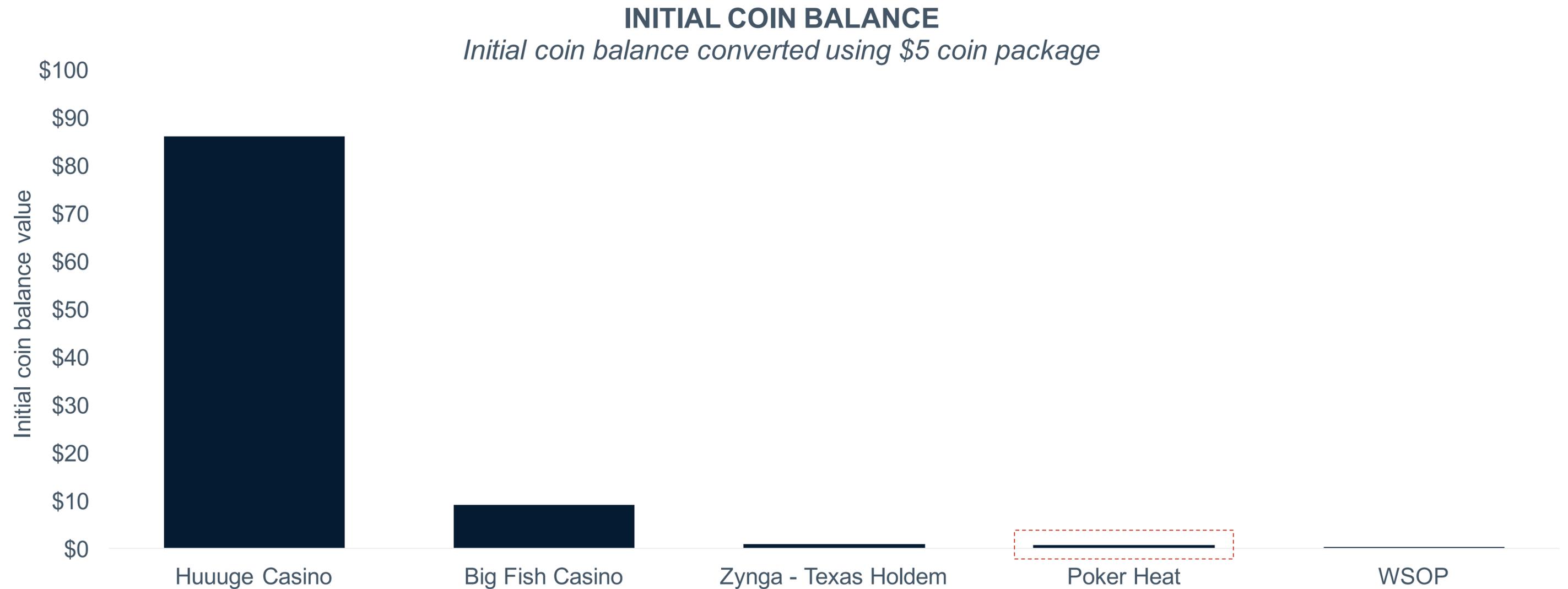
Poker Heat doubles down on competition with daily tournaments, bonuses, and benefits tied to rankings

- Poker Heat players may connect through Facebook or play as a guest upon app entry. Choosing 'Guest' prompts a dialogue to enter a profile name (image 1).
- The lobby displays various poker rooms, a league leaderboard, prize pool, and timer (image 2).
- Players compete in a daily tournament, earning points to determine league placement for the next day. There are three zones: *Promotion*, *Safe Zone*, and *Regulation*. Players move up, stay, or move down a league depending on their final zone (image 3).
- A player's league determines various benefits: bonus multipliers, store multipliers, and increases to prize pools (image 4).
- A league leaderboard is visible during play and notifies players of any movement within the rankings (image 5).
- Chat displays a list of pre-set phrases (image 6).
- Players are notified of their results after tournament completion (image 7).
- A league-change dialogue displays the league for the next tournament and its benefits (image 8).



INITIAL COIN BALANCE

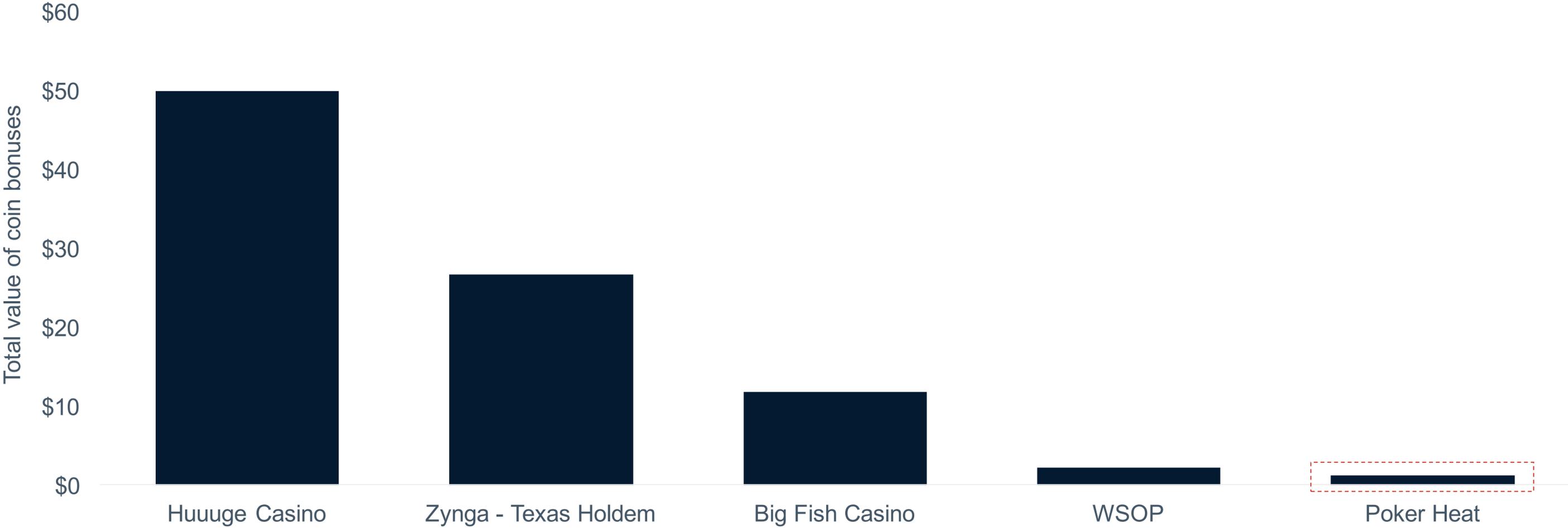
Poker Heat gives a small amount, \$0.75 coins initially, to new players compared to top grossing casino apps with poker



TOTAL VALUE OF COIN BONUSES

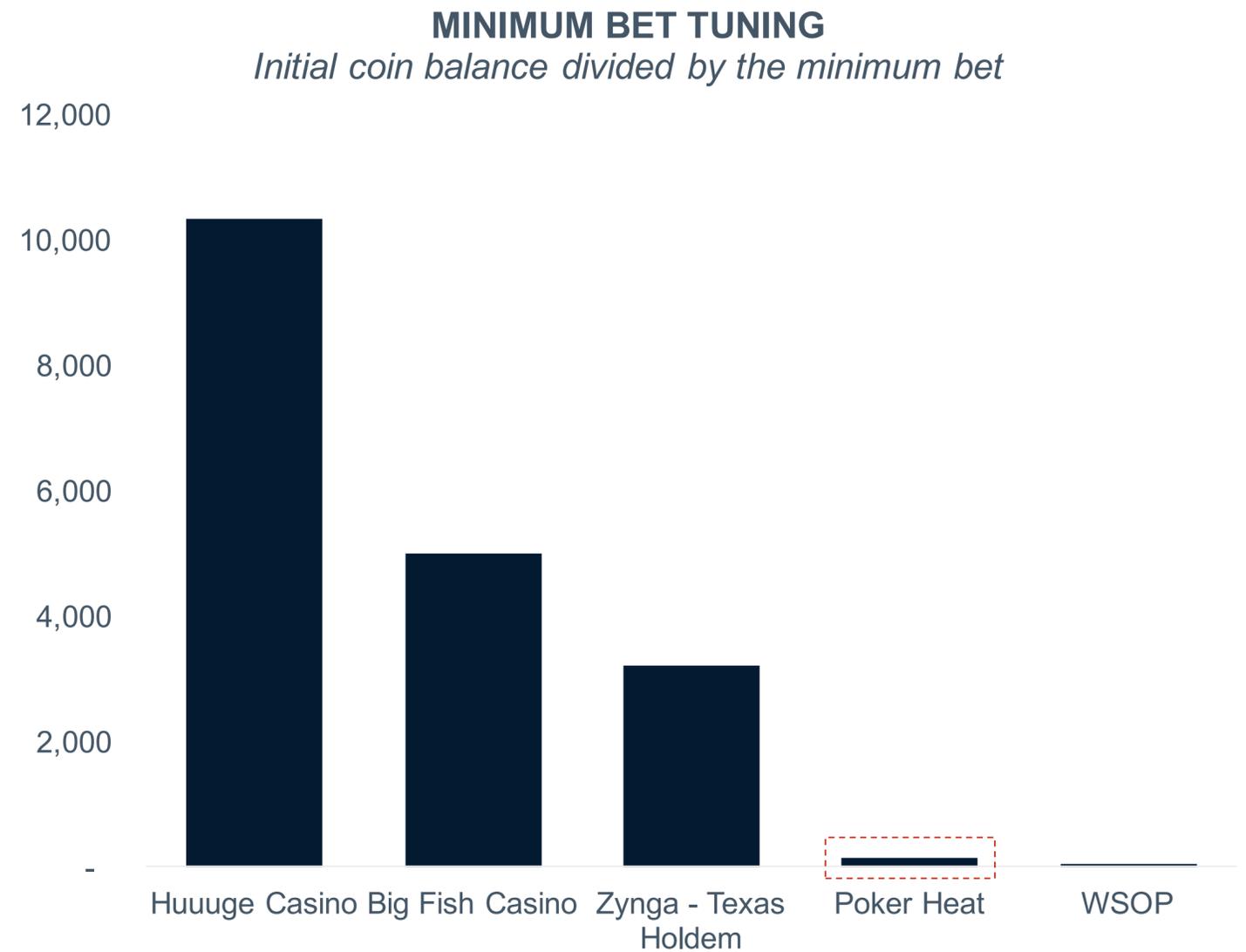
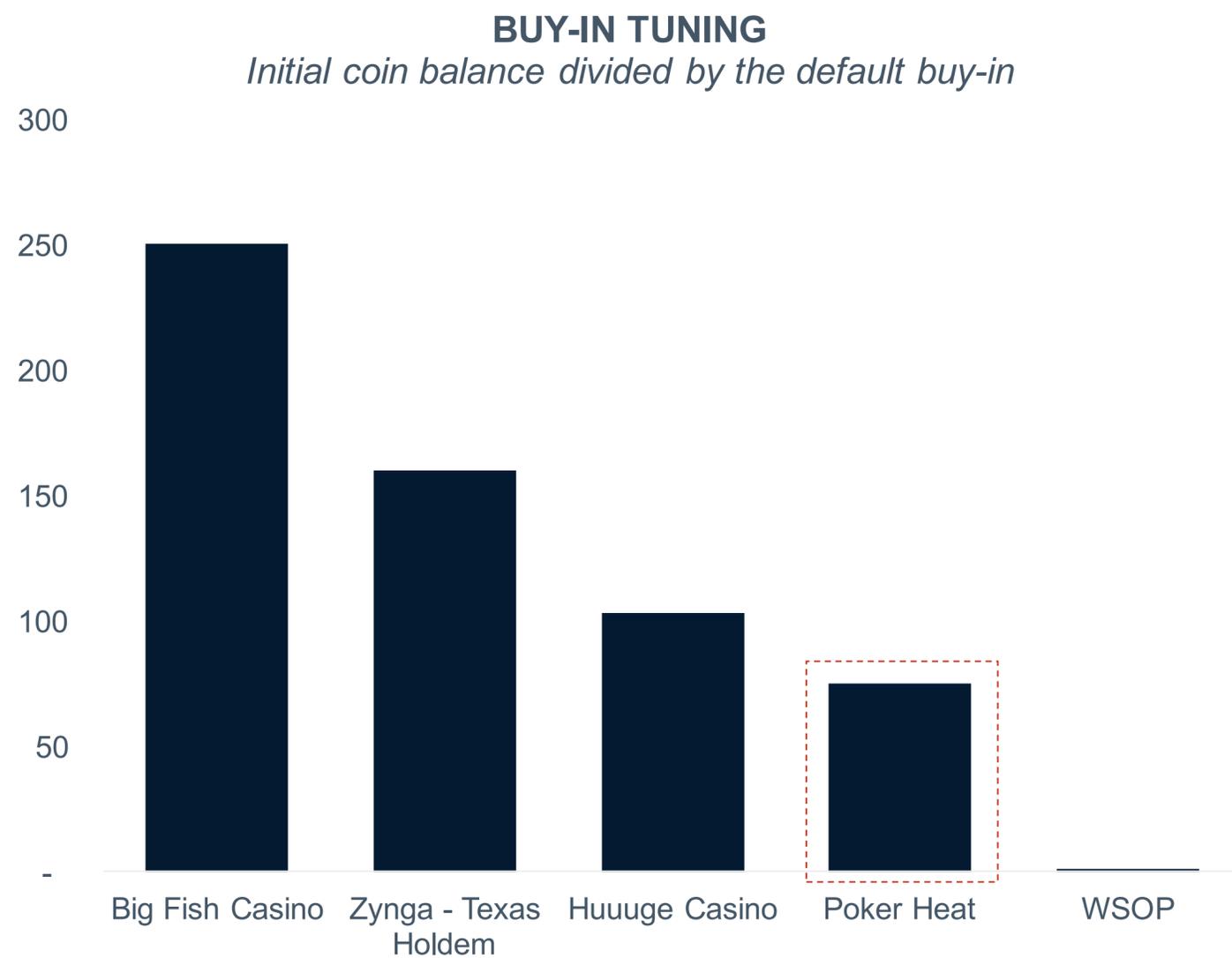
Poker Heat provides players with a very small amount of free coins daily. There is only one bonus paid out every four hours with a total value of \$1.22 given out daily

TOTAL VALUE OF COIN BONUSES
Daily coin bonus converted using \$5 coin package



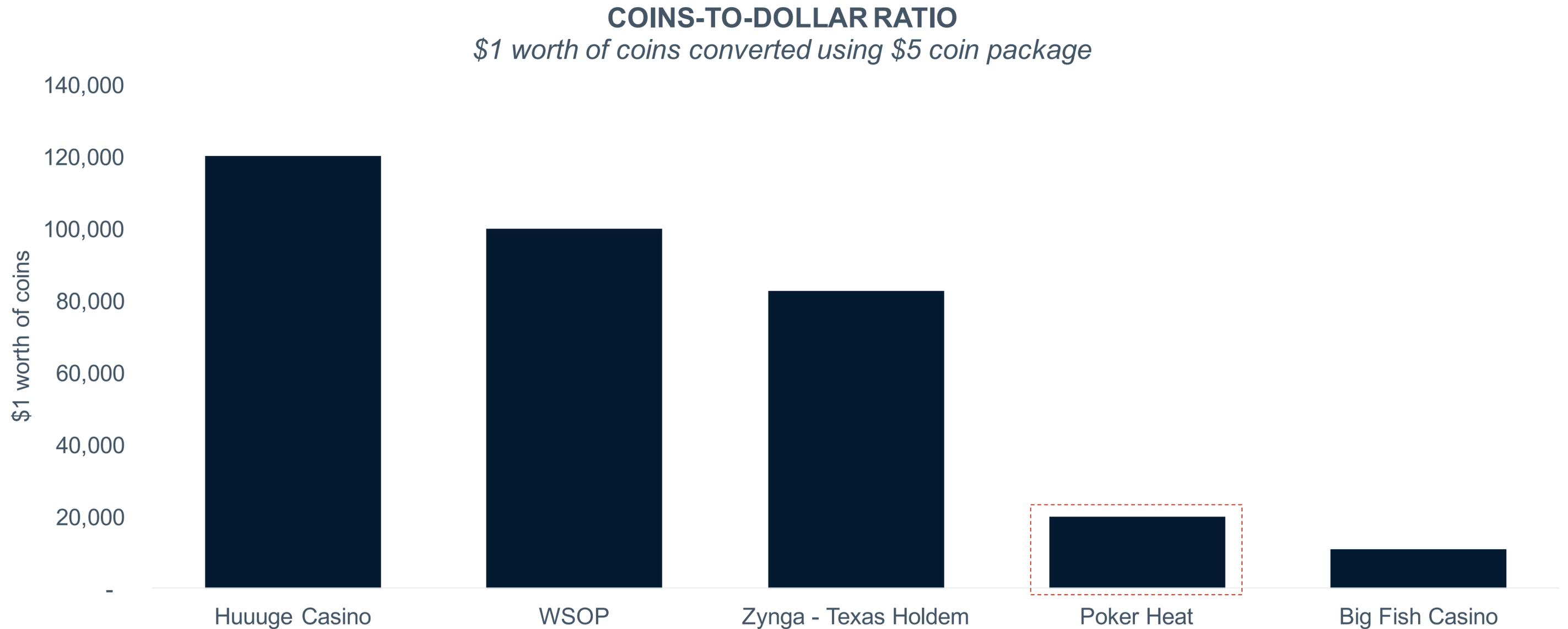
NEW USER TUNING

Poker Heat's new user buy-in tuning is tight: 75x the default buy-in amount and 150x the minimum bet amount. New users receive a below average amount of play time at both bet levels



COINS-TO-DOLLAR RATIO

Poker Heat has a low coins-to-dollar ratio, \$20K coins for every dollar spent, relative to top grossing casino apps with poker



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 section 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.

In the midst of chaos, there is also opportunity

– Sun Tzu, *The Art of War*

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