

POKER MACHINES FROM IDEA TO PLAY



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Analyst? Early Adopter? Follow The Leader? Salespersons Friend?

Class III Gaming

No Skill
Random Outcome
Spinning Reel
Games of Chance

What We Don't Do



The Balancing Act







REPEAT



PLAY



REPEAT



PLAY

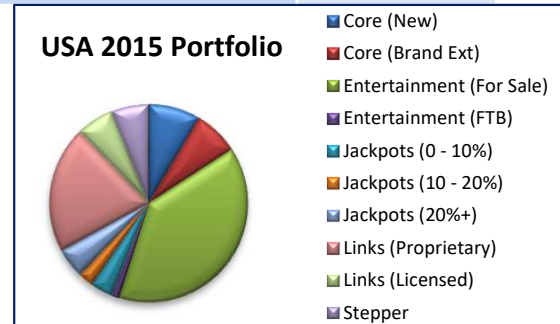
There is no “i” in Team



2015 US Segmentation View

	CORE			ENTERTAINMENT		JACKPOTS			LINKS		STEPPER
	New	Brand Ext	Multi game	For Sale	FTB	0 - 10%	10% - 20%	20%+	Proprietary	Licensed	Stepper
2014	<ul style="list-style-type: none"> Mega Reel Power (3) Jester's Fortune Super Feature (3) Collect & Go Wild(2) The White Wizard The Red Empress 	<ul style="list-style-type: none"> Pompeii Legends Wicked Winnings Legends Wonder 4 Gold Buffalo Deluxe Clone Timber Wolf Deluxe Clone Brazil WS 50 Lions Deluxe 	<ul style="list-style-type: none"> Players Choice Diamond Edition 	<ul style="list-style-type: none"> Sky Rider (2) Temple of the Tiger (2) Storm Queens (4) Red Moon (2) Moon Maidens(2) Pearl Warriors (2) Gorgon Sisters (2) Diamond Dynasty (2) Magic Flower (2) Winning Window (4) Power Pays (4) 	<ul style="list-style-type: none"> Flash Dance 	<ul style="list-style-type: none"> Wonder 4 Jackpots Jackpot Streak (2) 	<ul style="list-style-type: none"> Gold Pays (2) 	<ul style="list-style-type: none"> Quick Fire Jackpots (4) 	<ul style="list-style-type: none"> Cashman Takes Flight (3) CEGC (6) Dragons on the Lake (5) Good Fortune (3) 	<ul style="list-style-type: none"> The Walking Dead Batman 1966 Big Bang Theory Tarzan of the Apes Can Can Paris 	<ul style="list-style-type: none"> Star Shot (2) Rolling Stones (1) Stormin' Jackpots (1) Power Hits (1) 2 x Licensed product (Tapitio , Pan Am)
Total	11 titles 13%	7 titles 9%	1 titles 1%	28 titles 33%	1 title 1%	3 titles 4%	2 titles 2%	4 titles 5%	17 titles 20%	5 titles 6%	5 titles 6%
Competitors	<ul style="list-style-type: none"> WMS making a clear attack on ATI core share through introduction of Blade content, 32 unique titles being developed in "core" segment in 2014 Bally also competes well in the core space with games such as Locking Hot Zone. IGT has strong games in the core space such as Cleopatra and Miss White. Konami's China Shores continues to perform well 			<ul style="list-style-type: none"> IGT competes in this space with High 5's Super Stacks games Aruze has entered this space with their range of Ultra stack Games Bally has now released a range of stacked symbol High 5 games 		<ul style="list-style-type: none"> Bally is doing well in the jackpot segment with Quick hits, and Hot Shot Progressives IGT has responded with Fast Hit Progressives Ainsworth Quad Shots products are starting to perform well Multiple manufacturers are introducing Bolt on progressives 			<ul style="list-style-type: none"> Bally's Cash Wizard is still performing well WMS Willy Wonka, and Monopoly series have been very successful IGT's Wheel of Fortune games are competing well consistently IGT deploying multiple variations on Hyperlink 		<ul style="list-style-type: none"> Bally Quick Hit stepper IGT's Red Hot 7's and Double Double Deluxe WMS Diamonds of Dublin
Trends	<ul style="list-style-type: none"> Unique reel layouts, Wild multipliers, Wheel features, wild hot zones, expanding symbols, large number of free games. Entry bet around 40-60 credits. Raising the bar in terms of game quality with enhanced graphics, sounds features, wheels 			<ul style="list-style-type: none"> Stacked symbols, low volatility, high feature frequency, heavy animation, strong realistic artwork, multi play, wild mechanics. 		<ul style="list-style-type: none"> Max bet required to trigger progressives RTP in the higher range of 10%-20% or 20%+ 			<ul style="list-style-type: none"> Strong competitor performance coming from mostly licensed product 		<ul style="list-style-type: none"> 7's artwork 3 and 5 reel steppers

Total= 84 Games



Segmentation Trends from G2E Gaming Show

CORE GAMES ONLY - Global Segmentation - Class III product only							
Manufacturer	Low Line	Mid Line	High Line	Ways	MultiPLAY	Multi game	TBD
Ainsworth	9.59%	13.70%	57.53%	5.48%	0.00%	13.70%	0.00%
Aruze	17.28%	46.91%	30.86%	0.00%	0.00%	0.00%	4.94%
Bally	7.86%	58.57%	17.14%	12.86%	1.43%	0.00%	2.14%
Cadillac Jack	7.50%	12.50%	35.00%	20.00%	0.00%	0.00%	25.00%
IGT	15.38%	24.79%	29.06%	20.51%	10.26%	0.00%	0.00%
Incredible Tech	5.56%	5.56%	83.33%	0.00%	0.00%	0.00%	5.56%
Konami	12.37%	38.14%	23.71%	11.34%	0.00%	14.43%	0.00%
MGAM	0.00%	8.33%	91.67%	0.00%	0.00%	0.00%	0.00%
WMS	3.06%	11.22%	78.57%	1.02%	0.00%	6.12%	0.00%
Grand Total	10.79%	32.90%	39.14%	8.58%	1.82%	3.90%	2.86%

Note: filtered GTECH as a lot of the data was missing

CORE GAMES ONLY - Cost to Cover Trends- Class III product only						
Manufacturer	<40	40-59	60-79	80-99	\$1+	TBD
Ainsworth	12.70%	49.21%	1.59%	0.00%	34.92%	1.59%
Aruze	59.26%	35.80%	0.00%	0.00%	0.00%	4.94%
Bally	40.71%	52.86%	0.00%	0.00%	5.00%	1.43%
Cadillac Jack	15.00%	75.00%	0.00%	0.00%	0.00%	10.00%
IGT	25.64%	45.30%	7.69%	5.98%	15.38%	0.00%
Incredible Tech	11.11%	83.33%	0.00%	0.00%	0.00%	5.56%
Konami	27.71%	63.86%	7.23%	0.00%	0.00%	1.20%
MGAM	8.33%	91.67%	0.00%	0.00%	0.00%	0.00%
WMS	10.87%	76.09%	0.00%	0.00%	9.78%	3.26%
Grand Total	31.66%	54.94%	2.17%	0.95%	7.58%	2.71%

Please note: This are very preliminary results only, we are still editing and modifying the database. Please only use directionally

2015 Global Strategy

Global approach, creating global games deployed globally.

- Defend the core
- Fast Follow **new*
- Evolution of Brand Extensions **new*
- Launch Portrait **new*
- Grow Multigame **new*
- Create new Brands
- Identify and attack segments “ripe” for share taking
- Links and SAPS
- Entertainment For-Sale Segment
- Grow US RR footprint
- Globalize licenses **new*
- Create new segments through innovative game mechanics
- Increase average bets **new*



ANZ Objectives

- Attack the core through a balanced risk portfolio.
- Position E-Series as incremental across all venues...multi-game value add.
- Establish a beachhead in the SAP segment.
- Cultivate the link segment and align requirements with other regions.
- Define a clear content/ innovation strategy for multi-game that maximises our penetration.
- Innovate bet structure to balance cost to cover and “buy up” trends.
- Establish player loyalty across product family & segments
- Flexible planning and development effort (fast follow)



Tracking

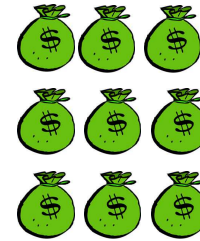
Activity	Output	Date	Status
Market Insights	Trade Show Reviews, Regional Visitation, Market Insights	Aug - Oct	80%
2015 Planning Session	Agree Focus, Align Strategies, Market Trends, Segmentation Analysis, Attributes & Mechanics, Positioning	Oct - Dec	50%
Portfolio Management	Regional Priorities, Brand Management, Studio Briefings, Concept Pitches	Oct - Dec	25%
Portfolio Build	Draft 1 st market MGL including Q1 2015 EPP lockdown, Alignment of hardware & content.	Nov - Jan	0%
Regional Build	1 st , 2 nd & 3 rd Markets, port & transfer requirements including licenced content, phasing & alignment to trade shows,	Jan - Feb	0%
Delivery Plan	Capacity Planning, Platform Alignment, Tech Assessments, Global EPP	Mar - Jun	0%
BAU	Fast Follows, Tier management , Priority changes	Ongoing	



Target Segment



- 1c
- 2c
- 5c
- 10c
- 20c
- 50c
- \$1



OR



Volatility



Feature



BALANCE

Jackpots



Development Breakdown

Originating Idea/Concept

Game Design/Math

Art/Animation

Sound

Software

S.I.T & The Regulations

(Software Integrity Testing)

The Originating Idea

Strategy

- NSW Capped market 95,000 machines
- 1,500 – 2,000 Queen of the Nile in the field, with performance coming off
- Also 6,000 – 7,000 5 Dragons in the field, performing well but blocking sales
- A lot of these games in Mk5 or Mk6 boxes blocking sales of Viridian Widescreen
- How can we convince operators to buy our new Viridian Widescreen and that it will perform as well or better than the QON or 5D's they currently have







The Originating Idea

Licenses

- Generally used in the Recurring Revenue space in USA
- Over 50% of Revenue derived from Recursion
- Generally Licenses are used in this space so the originating idea can be clear
- Or is it? Is it easy pickings?
- Have to consider business strategies
- There is the costs associated with the license
- Perhaps limited uses within the license







The screenshot displays a 5x5 slot machine grid with the following symbols from top to bottom, left to right:

- Red crystal ball in a glass dome
- Wild symbol (Batman mask)
- Wild symbol (Batman mask)
- Green Joker face
- Bust of an elderly man
- Purple Batgirl on a motorcycle
- Wild symbol (Batman mask)
- Wild symbol (Batman mask)
- Wild symbol (Batman mask)
- Purple Batgirl on a motorcycle
- Wild symbol (Batman mask)
- Blue bat wings
- Blue bat wings
- Red crystal ball in a glass dome
- Bust of an elderly man
- Batman character

At the bottom of the screen, the following information is displayed:

- GAME RULES** (button)
- MIN BET 50**
- 50 BET**
- FEATURE COMPLETED**
- 396 WIN**
- LINE 02 WINS 4 X3**
- 20282 CREDITS**
- 1¢** (bet per credit)

Decorative text on the left and right sides includes: "ALL WINS X3", "25 LINES", and "ALL WINS X3".









Wait for it...



The Originating Idea

- Competitors



The Originating Idea

- Iterative / Brand Extensions



The Originating Idea

- **Blue Sky**

FREE GAMES

JACKPOTS

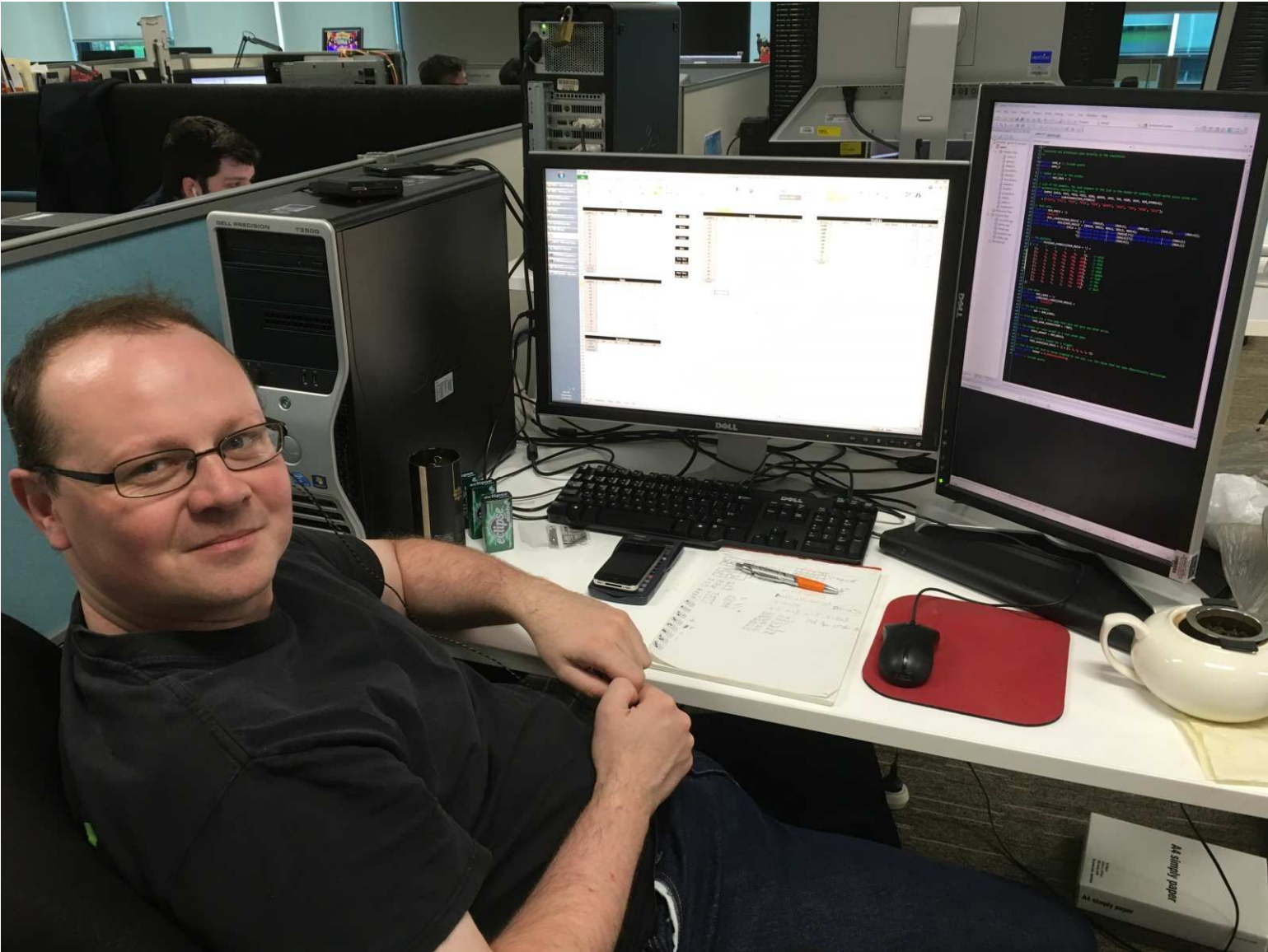
PICK AND MATCH

ANTE BETS

CHOOSE YOUR VOLATILITY

LIGHTNING LINK!!!

Game Design/Math



Then

Link



Not Long Ago

S.A.P



Now Link



Then

5-10% Jackpots



Now

25-40% Jackpots



Then

Non Stacked



Now

Stacked



Art/Animation



Art/Animation



Wild Symbol Animation - Page #1

① Reel 2. Anticipation. Subtle - segments separate - small bounce of logo

② Reel 3. Anticipation. Subtle but more than ① both seg sep & logo side

③ Wheel blast anim on all wilds → more an intentional event, all wilds are complete.

④ wheel blast VFX & segments 'suck' back in similar motion as per top screen

* Logo returns to place with added motion loop & fx

* wheel spins in a continuous loop while initial win lines are drawn.

* Layered anim so that logo has higher priority than blast.

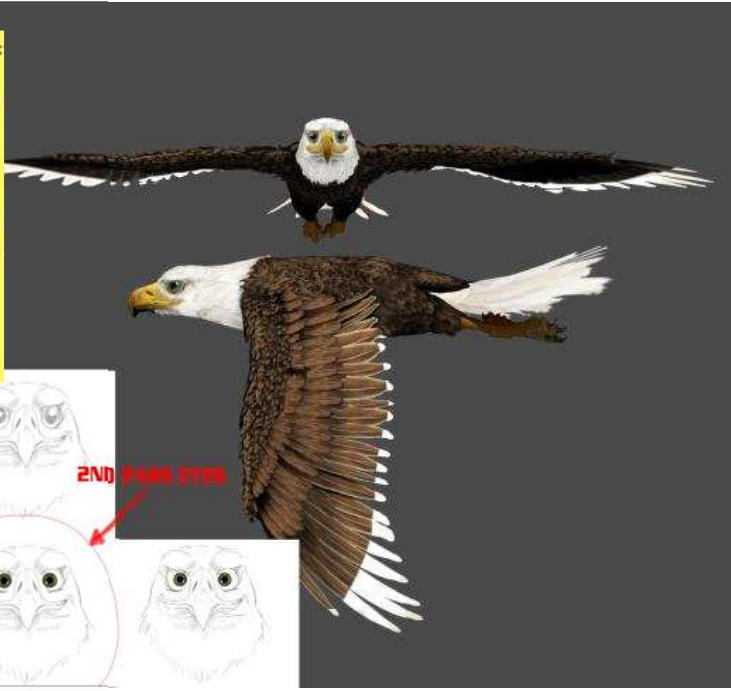
* Light sweep on logo.

* Pop in and ease out (2 or 3 frame) Pop, 10 frame ease

* Pop in and then ease out → subtle!

Use animation will be basis for the wilds' feature 'coin shower' (ornaments')

22/6/14 CS.



ARISTOCRAT



Art/Animation

Initial Sketches

Prototype



Developing



Art/Animation

ARRRRRGGGGHHH!!!



Sound



What is sound in a slot machine?

- On a basic level, it is used to acknowledge wins and to entertain the player.

Sound

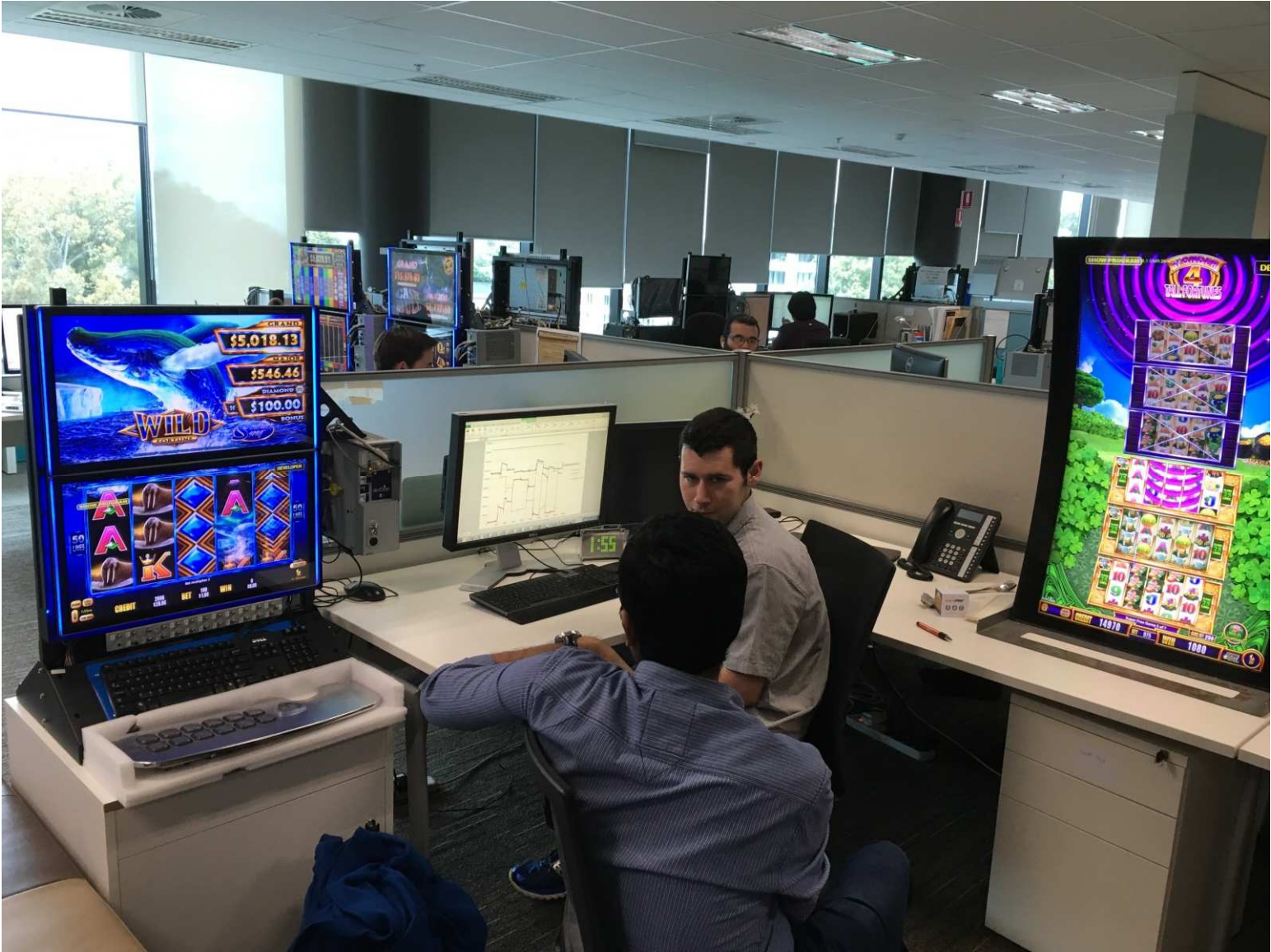
How Does it achieve this?

- Positive Reinforcement
- Timing
- Non Jarring
- Branded
- Themed

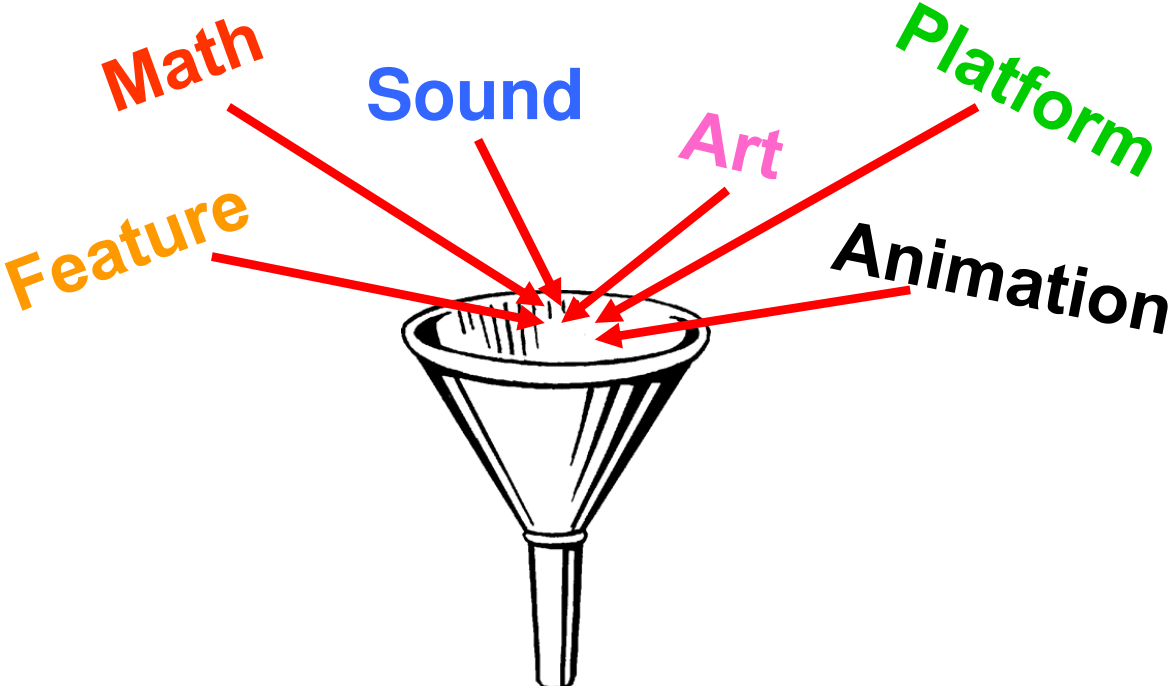
Score for our game 'Dragon of the Eastern Ocean'
Part of the Good Fortune Link Series of games

The image displays a musical score for a game, consisting of ten staves. The top six staves are labeled with MIDI instrument numbers: MIDI 29, MIDI 48, MIDI 49, MIDI 50, MIDI 32, and MIDI 35. The bottom four staves are labeled with MIDI instrument numbers: MIDI 45, MIDI 46, MIDI 47, and an unlabeled staff. The score is written in a standard musical notation style, including notes, rests, and stems. The notation is organized into measures, with vertical bar lines separating them. The overall layout is clean and professional, typical of a game audio score document.

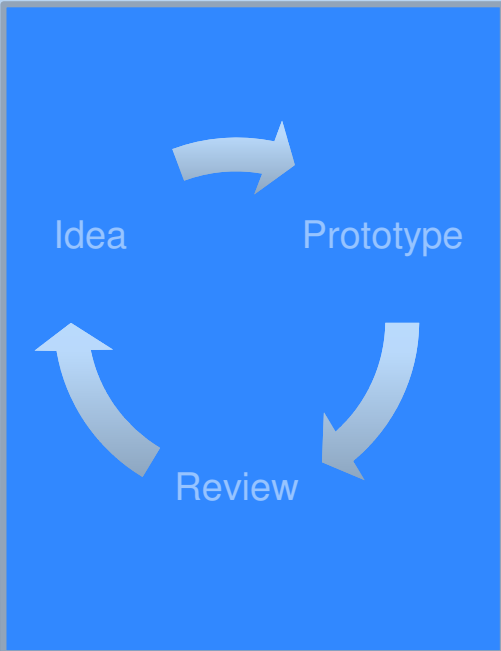
Software



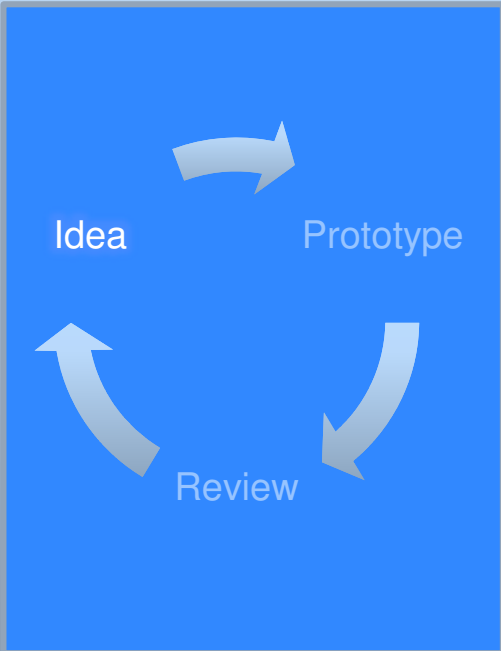
Software



Software



Idea/Early Concept



Software Role

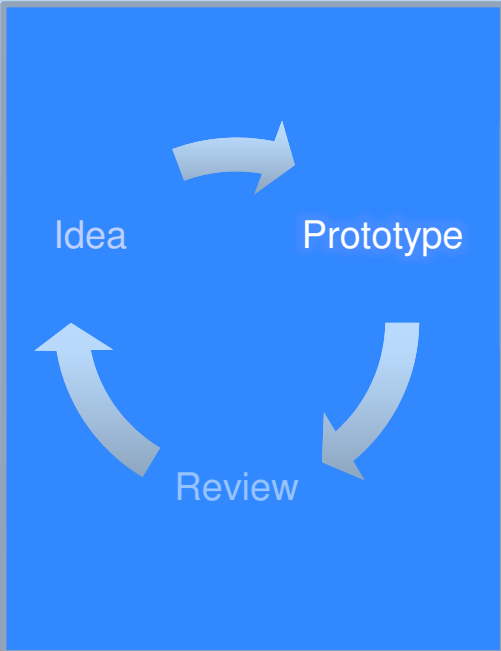
Identify new/unsupported requirements

Feasibility(time)



Software: From Idea to Game

Prototype/Advanced Concept



Software Role

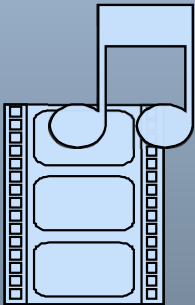
Establish “material” requirements with Game Design (maths files) and Art (Image/Animation/Sound) files

Develop prototype software (fast turnaround)



Prototype/Advanced Concept

Establish “material” requirements with Game Design (maths files) and Art (Image/Animation/Sound) files.

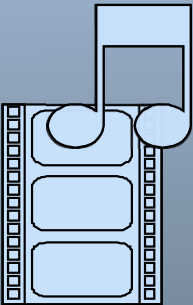


Prototype/Advanced Concept

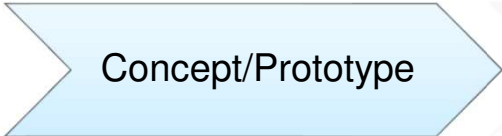
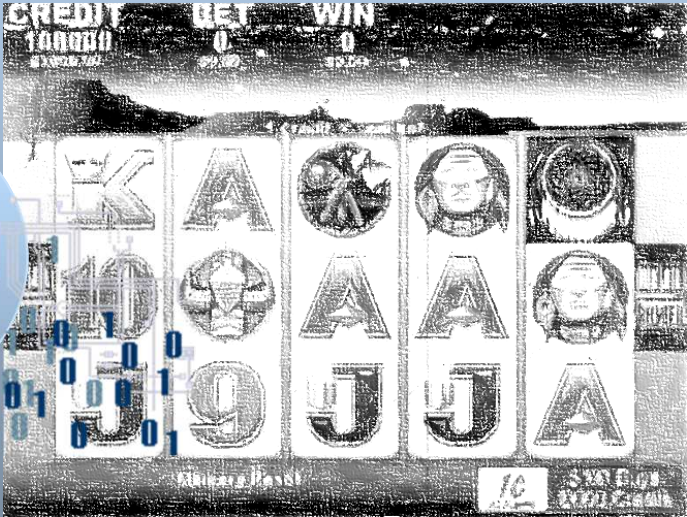
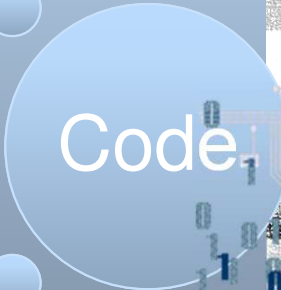
Code prototype software.



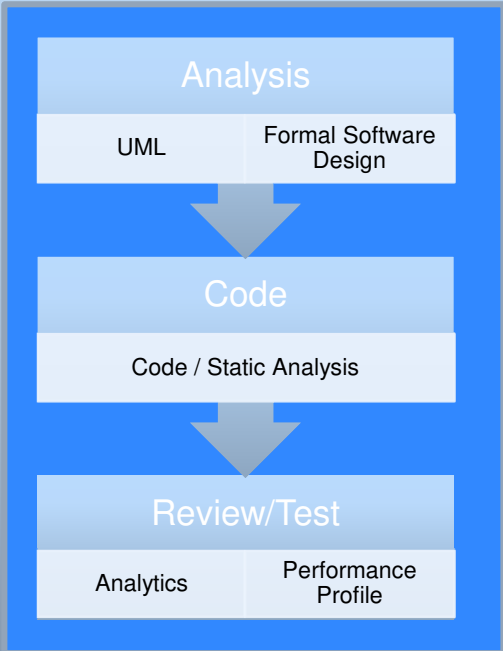
Math



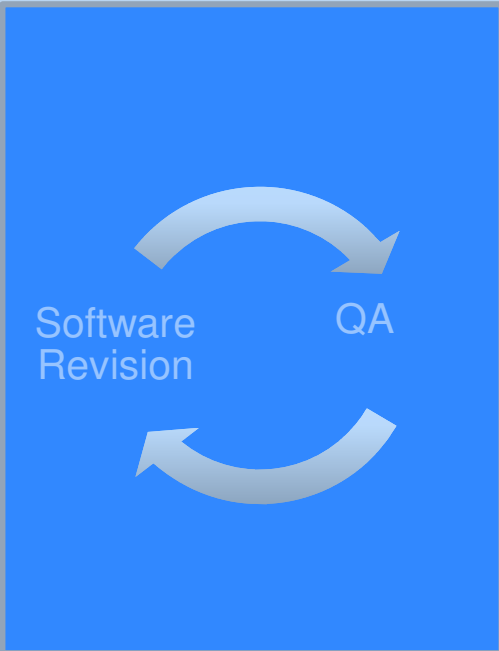
Art/Sound



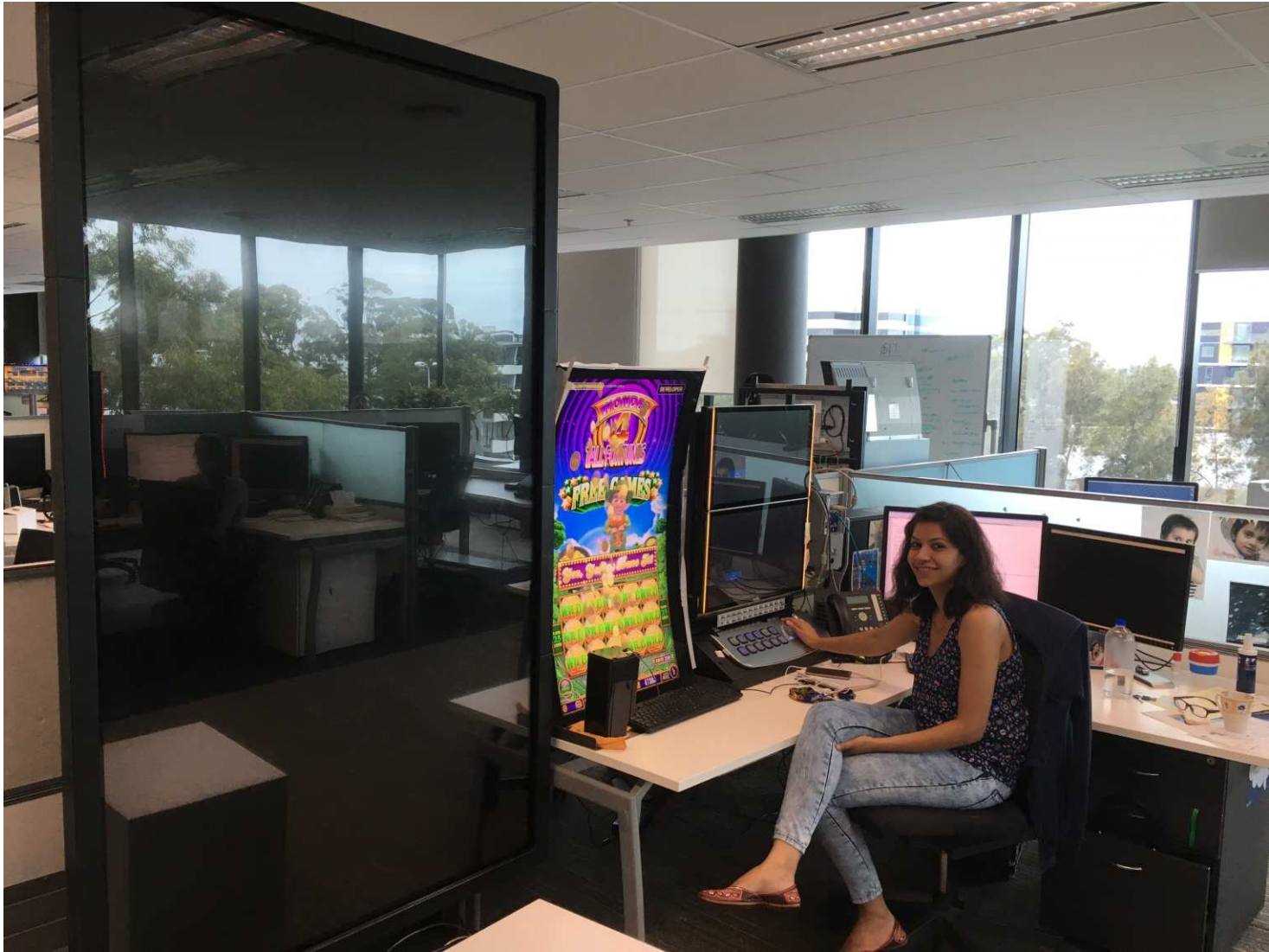
Software: From Idea to Game



Software



S.I.T & The Regulations



S.I.T & The Regulations



S.I.T & The Regulations

- **NSW** first market (MGL) – Xbase

PORTS

- **QLD** QCOM Base, maths change for jpots, new helpscreens, make sure there are versions applicable to VIC NET, SA CLUBS, TAS
- **CROWN** ASP Base, NSW maths with unique denoms, QLD helpscreens, make sure it has options for NZ CASINOS
- **NZ CLUBS** Spinning reels but new everything except art (symbols)
- **US** World base, new maths, new helpscreens
- **MACAU / SINGAPORE CASINOS** World base, dual language, New maths, New helpscreens, PIDS
- **EUROPE** TA from US but also sometimes a new build due to name issues
- **LATIN AMERICA** TA from US but may need Spanish translations
 - **WA** NO SPINNING REELS new everything except art (symbols)
 - **DIGITAL** new maths, art reformatting

QUESTIONS?