

The (re)emergence of traditional casual on social networks

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Game Developers Conference® Online 2011
October 10-13, 2011 | Austin, TX
www.GDCOnline.com

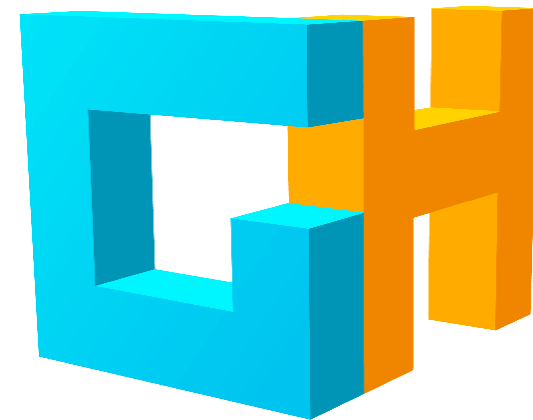
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Social gaming goes casual

- Casual games thrive on mass market platforms
- Traditional casual genres are underrepresented on social
- The late (re)emergence of casual games on social networks was not a platform issue
- Several proven models have emerged
- Four factors can help developers succeed with casual genres

A bit about GameHouse ...

- Developing and distributing casual games since 2000
- A leading PC / Mac / Mobile distributor and a growing social developer
- Have moved aggressively to a social / mobile focus



gamehouse.

Some games we're known for ...



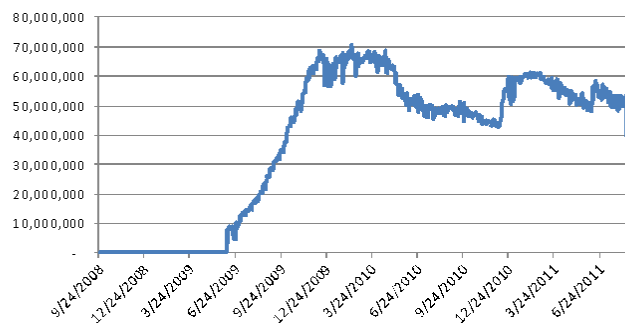
Is there growth left in social?

- Zynga is 5x bigger than the next largest developer on Facebook
- Social sims attract and monetize millions of players and suck all the air out of the space
- You need an ecosystem to grow – can't depend on viral features to drive users

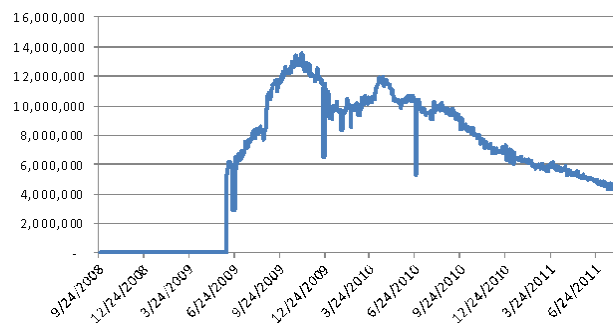
Social sims still rule ...

- DAU's for big social sim devs were flat to down through 2010 and early 2011
- Many factors, and I believe genre saturation plays a part

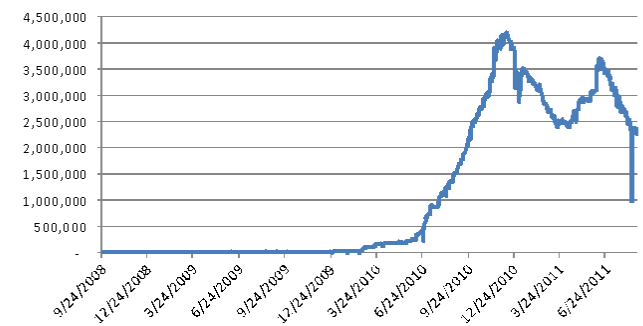
Zynga DAU



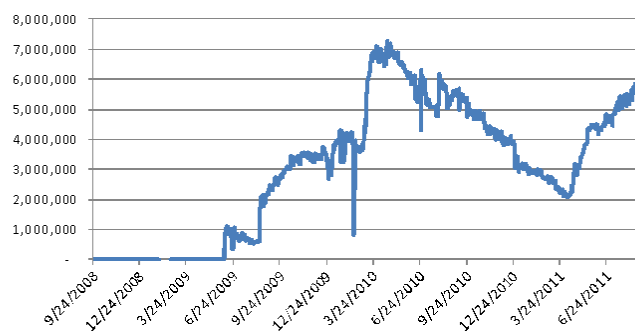
ElectronicArts DAU



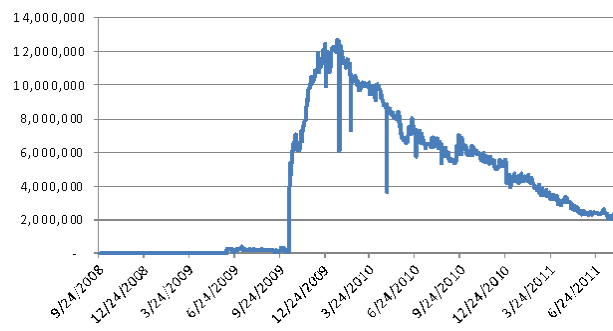
Digital Chocolate DAU



Playdom DAU

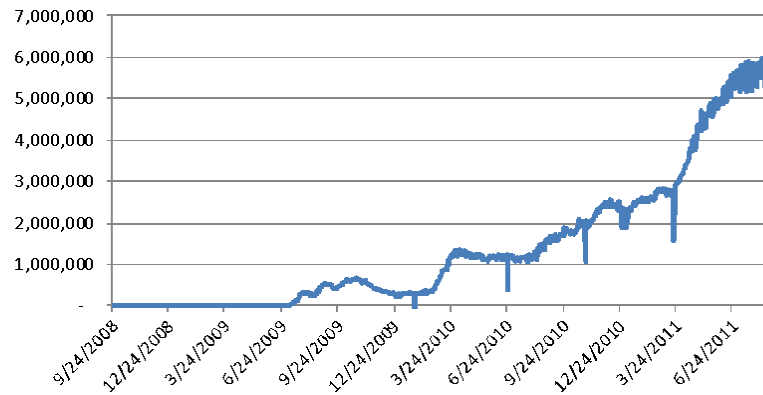


Crowdstar DAU

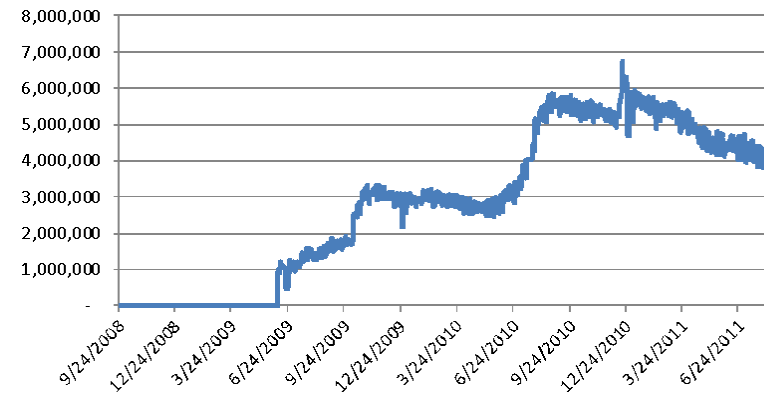


... but casual is on the rise

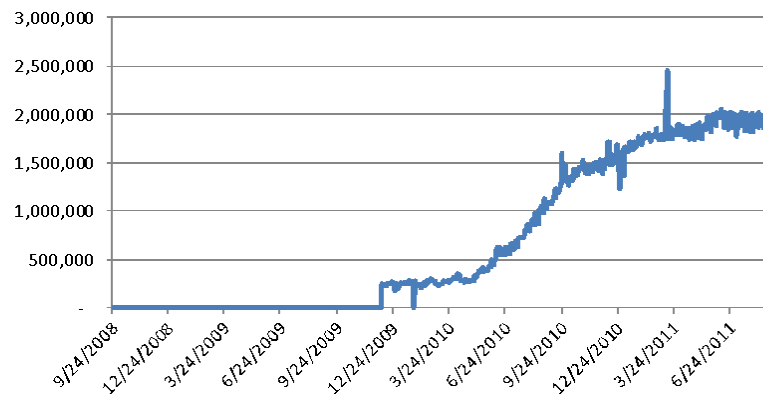
Wooga DAU



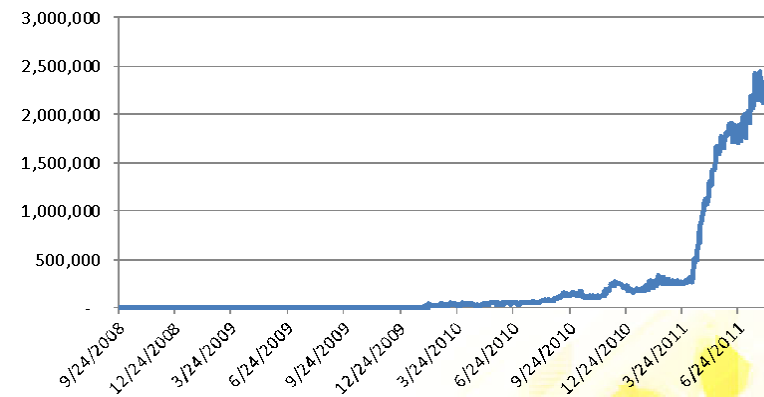
PopCap DAU



GSN DAU



King DAU



Facebook gaming 2010 → 2011

FB Top 10 Games Aug 2010

Rank	Game	DAU (M)
1	FarmVille	17.2
2	FrontierVille	7.0
3	Texas HoldEm Poker	5.4
4	Café World	4.8
5	Treasure Isle	4.0
6	Mafia Wars	3.9
7	Bejeweled Blitz	3.9
8	PetVille	2.8
9	Pet Society	2.8
10	Restaurant City	2.5

FB Top 10 Games Aug 2011

Rank	Game	DAU (M)
1	CityVille	14.2
2	FarmVille	8.2
3	Empires & Allies	7.0
4	Texas HoldEm Poker	6.8
5	Gardens of Time	3.6
6	FrontierVille	3.3
7	Bejeweled Blitz	2.8
8	Café World	2.4
9	Games (GSN)	1.6
10	Diamond Dash	1.6

Top 10 Facebook Devs – Aug '11

Rank	Developer	DAU (M)	Key Games
1	Zynga	51.2	Ville-Style, Words with Friends, Texas HoldEm
2	Electronic Arts	9.9	Sims Social, Restaurant City
3	Wooga	6.3	Diamond Dash, Bubble Island
4	Playdom	5.7	Gardens of Time , Wild Ones, Gnome Town
5	PopCap	4.2	Bejeweled Blitz, Zuma Blitz
6	King.com	2.3	Bubble Saga, Mahjong Saga
7	Digital Chocolate	2.3	Millionaire City, Zombie Lane
8	Happy Elements	2.2	Fish Sim
9	GSN	2.0	Games (game show portal)
10	Crowdstar	1.8	It Girl, Happy Aquarium

If casual games are a great fit
for social networks ...

... why did it take so long to
make inroads?

#1: That's not a game

- Early social games not seen as “games” at all
- Casual distributors funded many studios
- Viewed Facebook more as an acquisition channel
- Little incentive compete with their own services



#2: Not this old game again

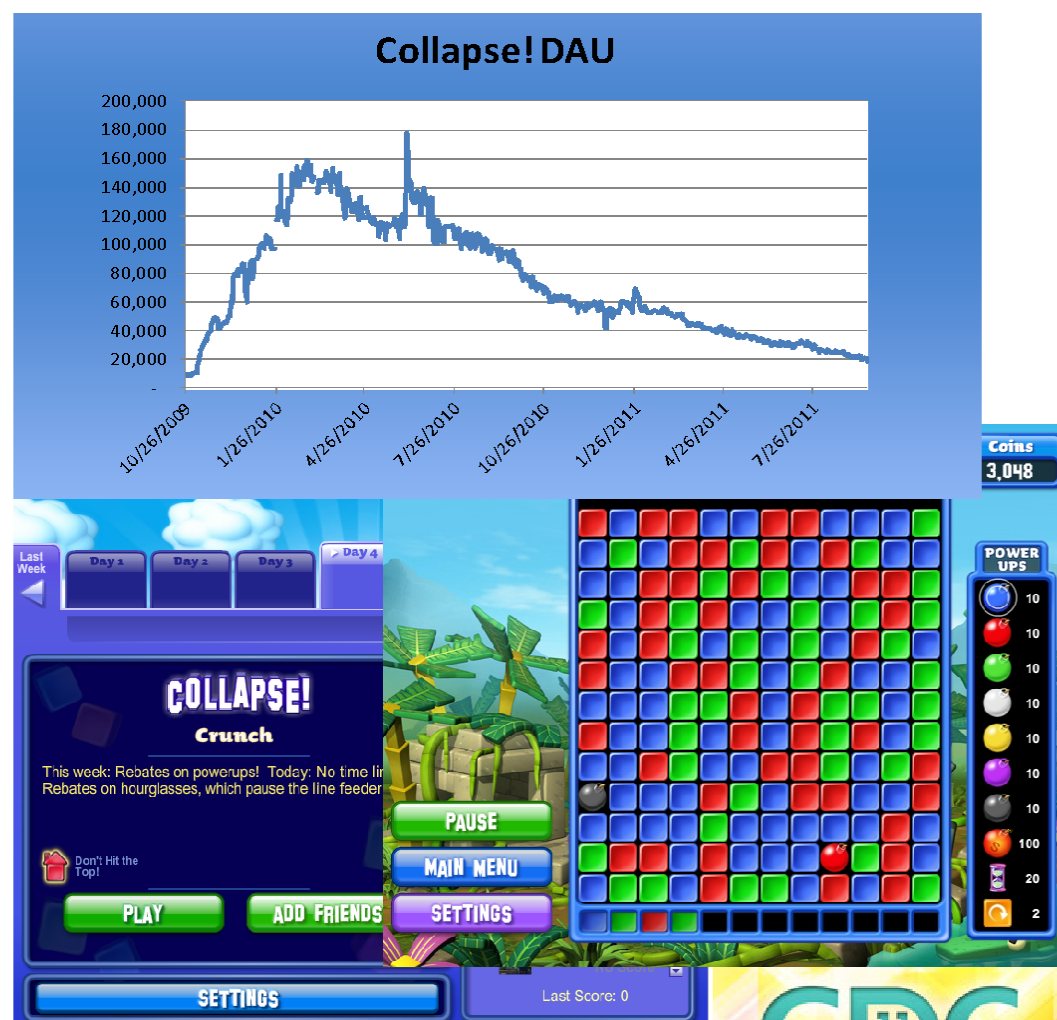
- Traditional casual genres old and worn-out?
- Social and monetization hooks not as obvious
- Early casual social games lacked polish and re-playability
- Most casual games that launched couldn't retain users
- Lack of clear success = lack of investment

#3: Pack & Ship Mindset

- Traditional studios weren't used to making money on the fly
- Content of early casual social games didn't change frequently enough
- Initial micro-transaction models not successful
- Early casual games unable to successfully use social / viral hooks

The Collapse of Collapse!

- Very popular title, still top online and mobile game
- Social game grew, then plummeted
- Content wasn't updated
- Micro-transaction model not compelling
- No social connections or reason to add friends



Five successful casual models

1. Short Cycle Play
2. Linear Quests
3. Micro-Aggregation
4. Hybrid Casual / Sim
5. Casino Style

Short Cycle: 60 second gems ...

- One minute rounds
- Power-ups accelerate play and drive monetization
- Special in-game rewards and power-ups
- Attention to detail – quality, excitement, etc.
- Mobile connectivity via FB Connect



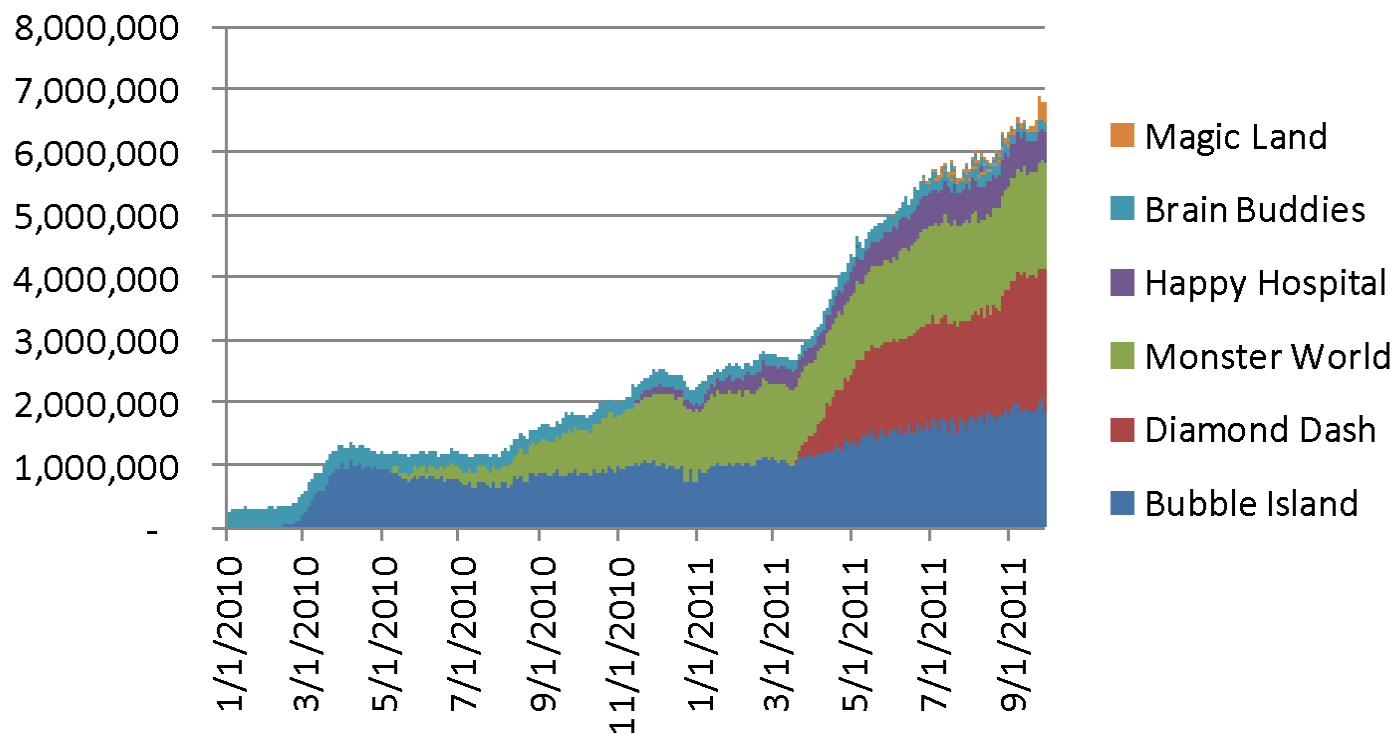
A few minutes with Wooga ...

- Simple, polished, engaging mechanics
- Gated game play and “ask friends” loops
- Weekly tournaments and 1x1 challenges
- Weekly content refresh
- Localization



Wooga Game-by-Game ...

Wooga DAU Trends



The (re)birth of Collapse!

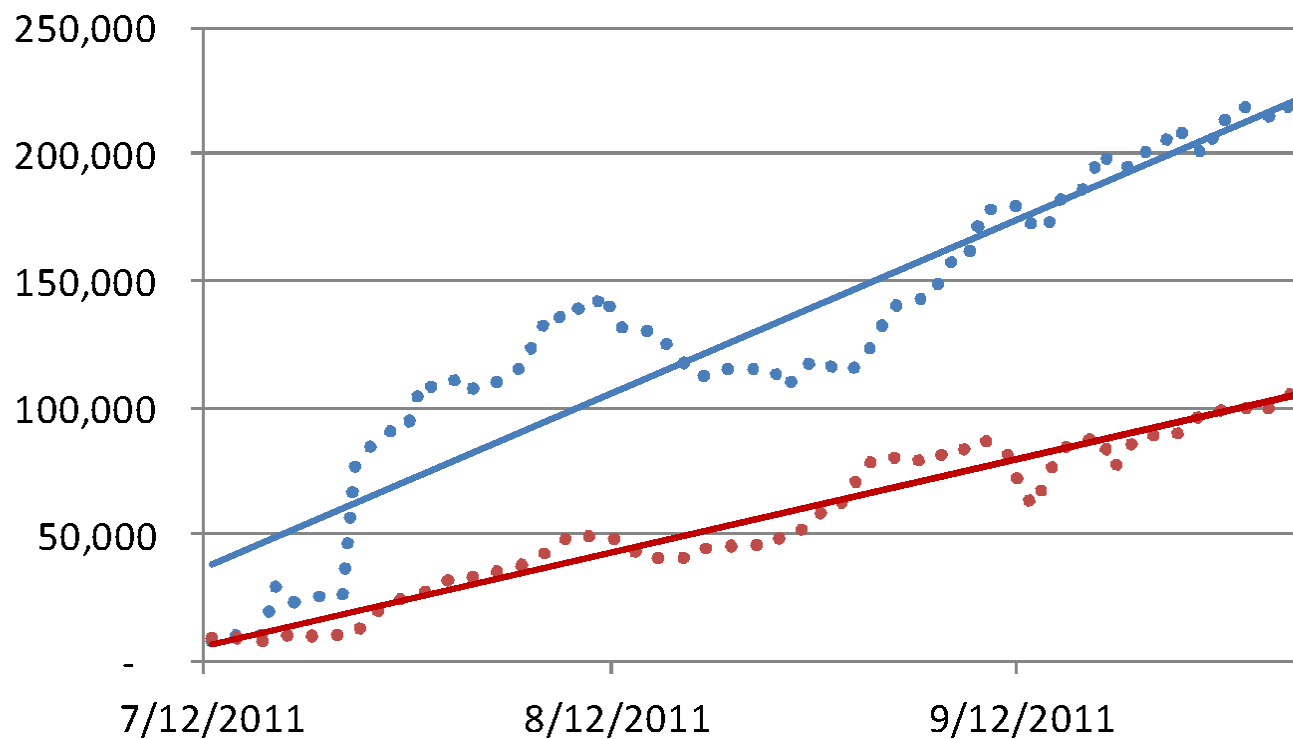
- Gated game play - hearts model
- In-game currency funds power-ups
- Rare in-game items



- Reciprocal gifting
- Friends-based leader boards
- Weekly tournaments

New model driving growth ...

Collapse! vs. Collapse Blast! DAU



Linear Quests ...

- Social adaptation of linear progression play
- Retains lives and paid power-ups model
- Social competition elements – map shows friends, 1x1 progression posts
- King.com developing ecosystem on this model



Micro Aggregators ...

- Portal-based approach
- Aggregating casual games
- Social features like achievements and currency around games
- More “casual” casual experiences



Casual / Sim Hybrids ...

- Combining build and decorate mechanics with casual mechanics
- Very successful adaptations of Hidden Object Genres
- Has also been employed with time management games

Free Gifts Play My Neighbors Invite Get Gold Help English



Casino Models ...

- Free to play casino games ecosystems
- Innovative art and sound, breathing life into well-established games
- Successful adaptation of gifting and invitations



Four keys to casual growth ...

#1: Genre Diversification

- Several popular casual genres still under-represented:
 - Hidden Object
 - Time Management
 - Puzzle / Arcade Derivatives
- Keys to success:
 - Creative iteration and evolution is a proven strategy

#2: Familiarity, appeal & accessibility

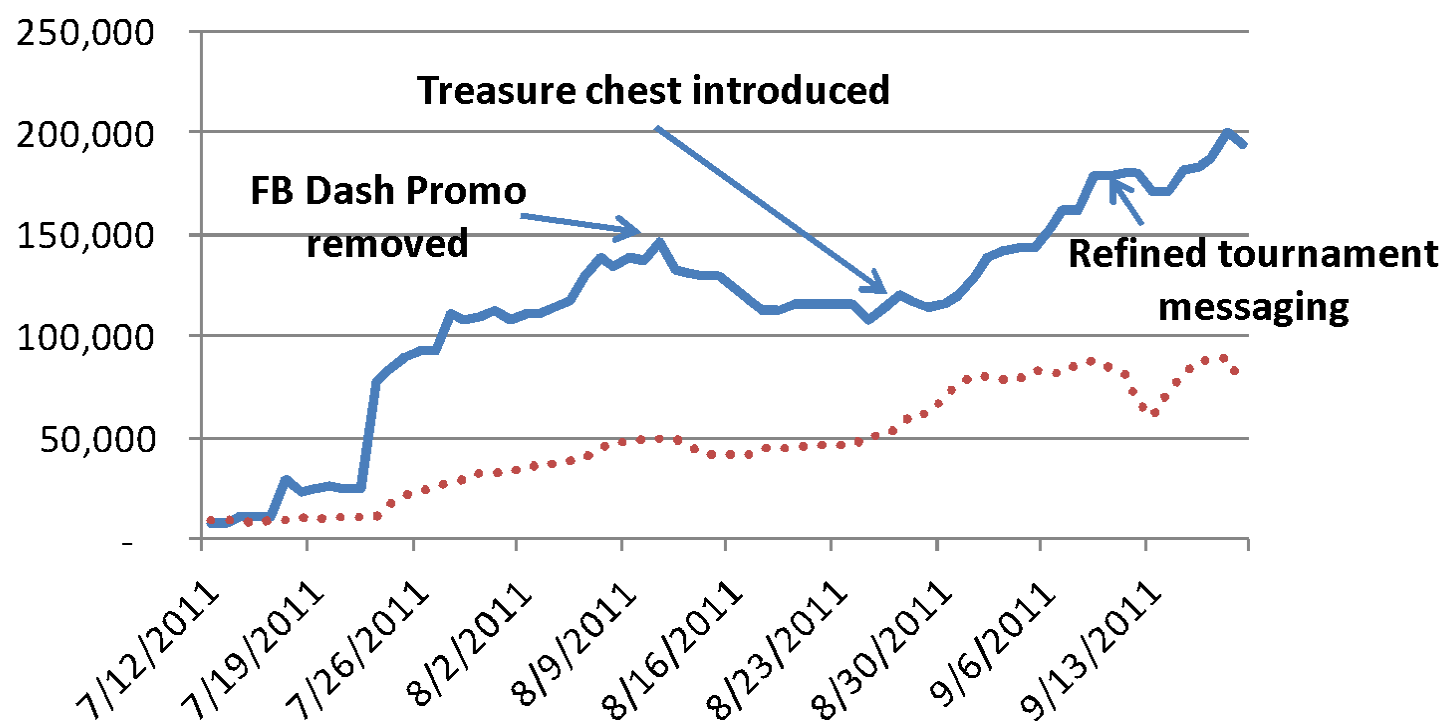
- Casual mechanics are timeless
- Players love these games, and many new players are discovering them
- Players are also familiar with established social game frameworks
- Keys to success
 - Build a foundation of familiarity
 - Focus in on a few differentiators

#3: Quality

- Deceptively difficult to create a great casual game
- It's all about finesse:
 - Look and feel
 - Physics
 - Balance of challenge and reward
- Keys to success:
 - Invest in the core mechanic first
 - Keep the elements that surround the game simple
 - Polish, polish, polish

#4: Iterative Optimization

Collapse Blast! Features Drive DAUs



Concluding casually ...

- Players have a strong appetite for traditional casual games
- As an industry, we need to love these games as much as players
- Don't be shy about following the paths forged by others
- Stay committed to variety, familiarity, and quality --- no matter what the platform