

Social Gaming: The Year in Review 2012 Edition

Steve Meretzky, VP Game Design, Playdom

Dave Rohrl, Creative Director, Playdom

March 6, 2012



Social Gaming: The Year in Review

2012 Edition



Here is a gift of New Year's Champagne for you. Can you help me by sending one back?

Accept



Here is a gift of a Valentine's Day Heart for you. Can you help me by sending one back?

Accept



Here is a gift of a St. Paddy's Day Four Leaf Clover for you. Can you help me by sending one back?

Accept



Social Gaming: The Year in Review 2012 Edition



Here is a gift of an Easter Egg for you.
Can you help me by sending one back?

Accept



Here is a gift of a Memorial Day Star
for you. Can you help me by sending
one back?

Accept



Here is a gift of a Start-of-Summer BBQ
Grill for you. Can you help me by sending
one back?

Accept



Social Gaming: The Year in Review 2012 Edition



Here is a gift of a Fireworks for you. Can you help me by sending one back?

Accept



Here is a gift of a Beachball for you. Can you help me by sending one back?

Accept



Here is a gift of a School Bus for you. Can you help me by sending one back?

Accept



Social Gaming: The Year in Review

2012 Edition



Here is a gift of a Jack-O-Lantern for you. Can you help me by sending one back?

Accept



Here is a gift of a Turkey for you. Can you help me by sending one back?

Accept



Here is a gift of a Dreidel for you. Can you help me by sending one back?

Accept



A big 2012



But first...

- Silence them thar devices
- Fill out them thar evaluation forms

A new format!













Game #1

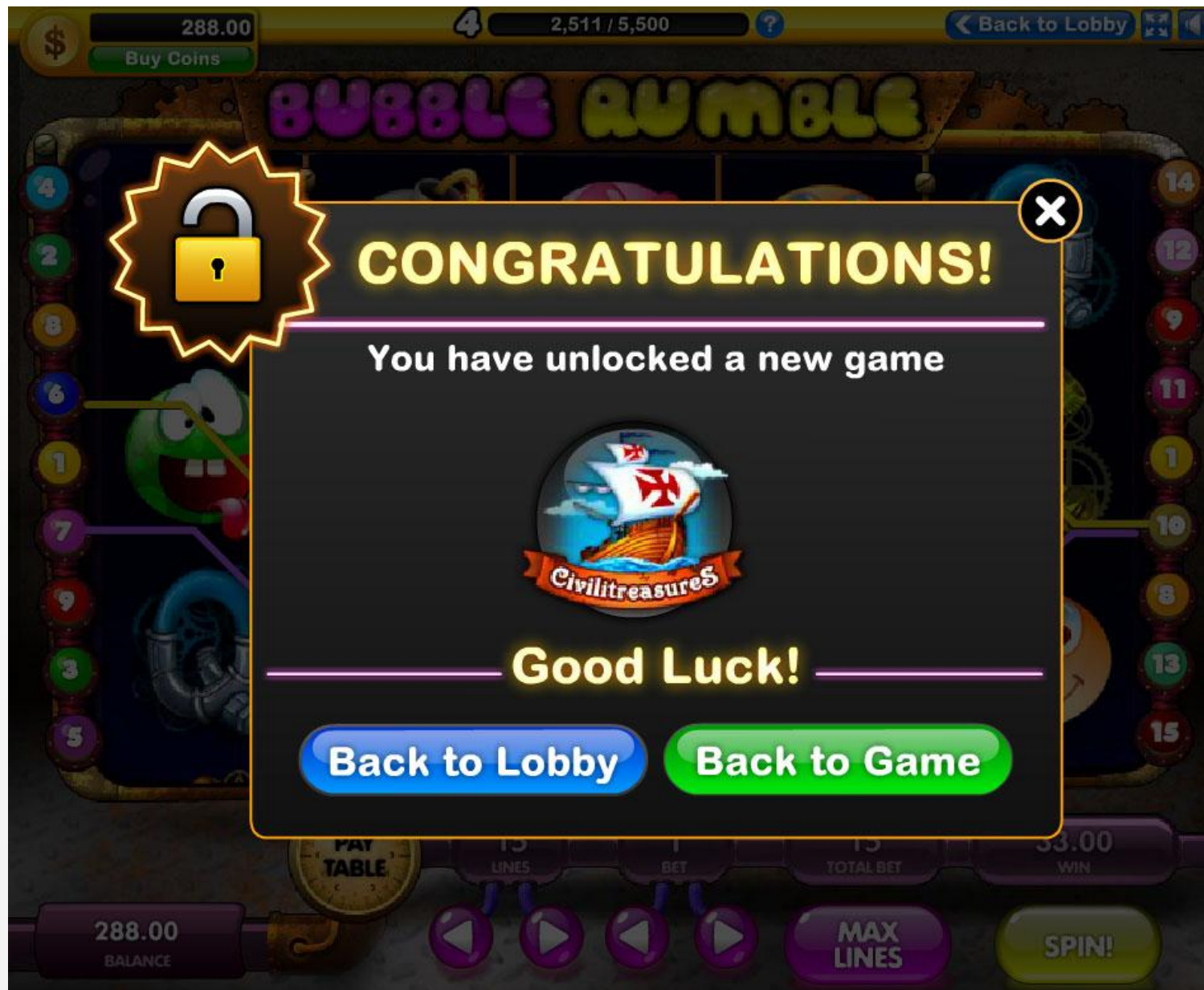
Take a Gamble



From Playtika










TOTAL WIN: 0



Welcome to the Bubble King Bonus Game

Blow four stages of bubble combinations to dethrown the Bubble King and seize his treasures.

Point the cannon to select a combination and shoot.

 Beware of the bombs, they can blow your quest and end the game.

START






How does it monetize?










How does it monetize?

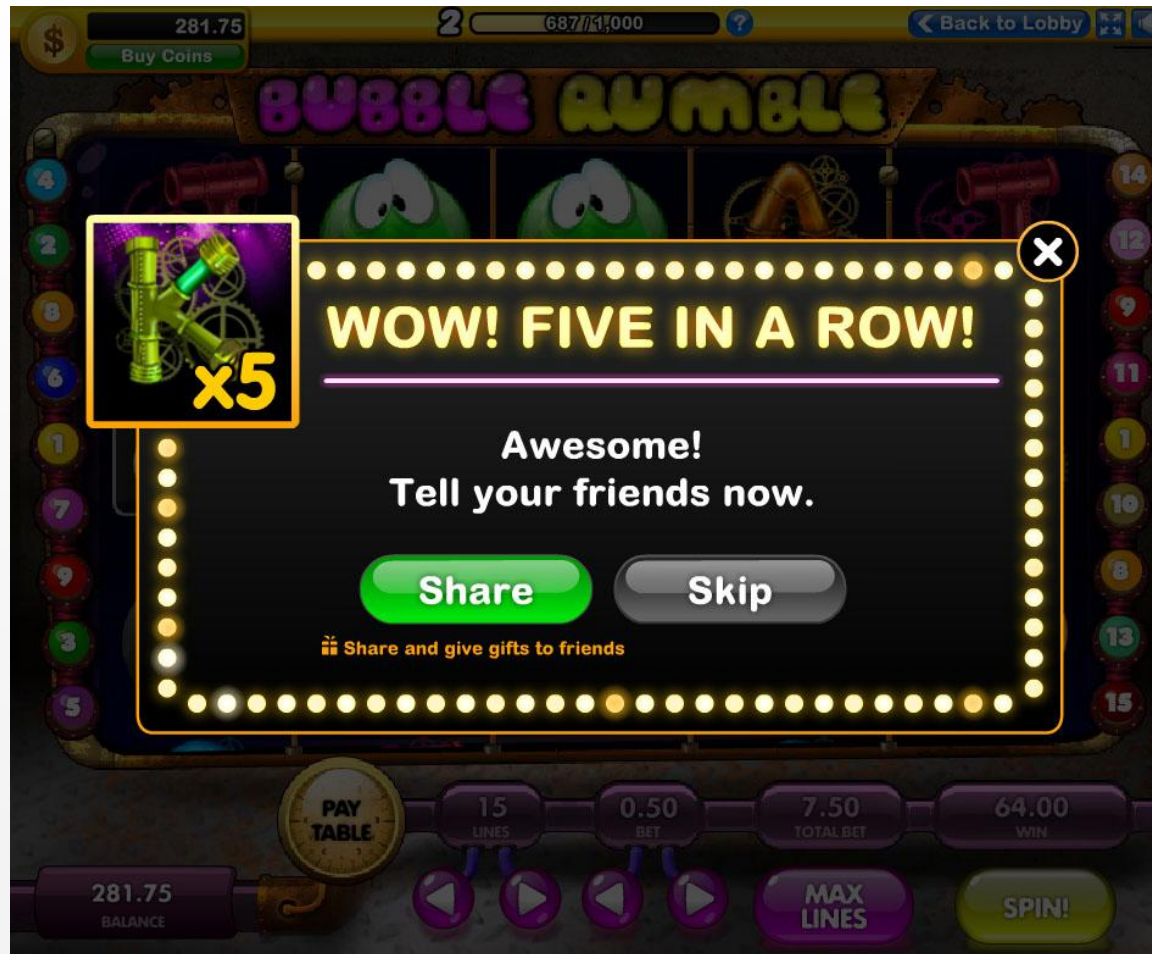
Earn Facebook Credits

 **Earn Credits for free**
Complete an offer below. It's easy and secure. [Terms Apply](#)

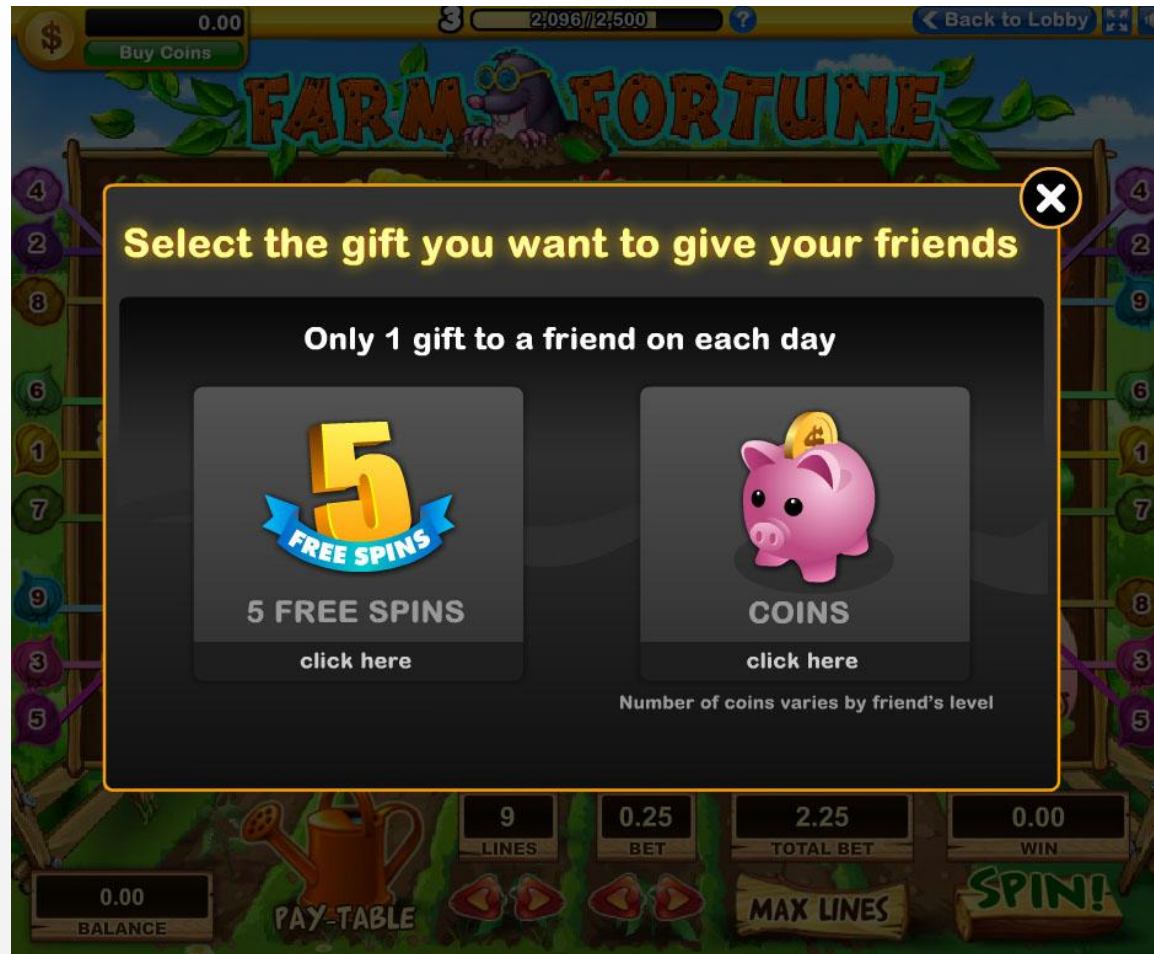
Most Popular Local Deals  **Surveys** Categories  **Help**

	Unlock Surveys Unlock surveys	1 Credit
	Discover More Card Get approved for a credit card	950 Credits
	Netflix Instantly watch movies from Netflix	220 Credits
	Android App: Mocospace Install and try this free app	5 Credits
	Flixster - Limited time free offer Signup for UltraViolet on Flixster	5 Credits
	Auto Quotes USA Get an auto insurance quote	120 Credits
	Citi ThankYou[®] Preferred Card	600 Credits

How is it viral?

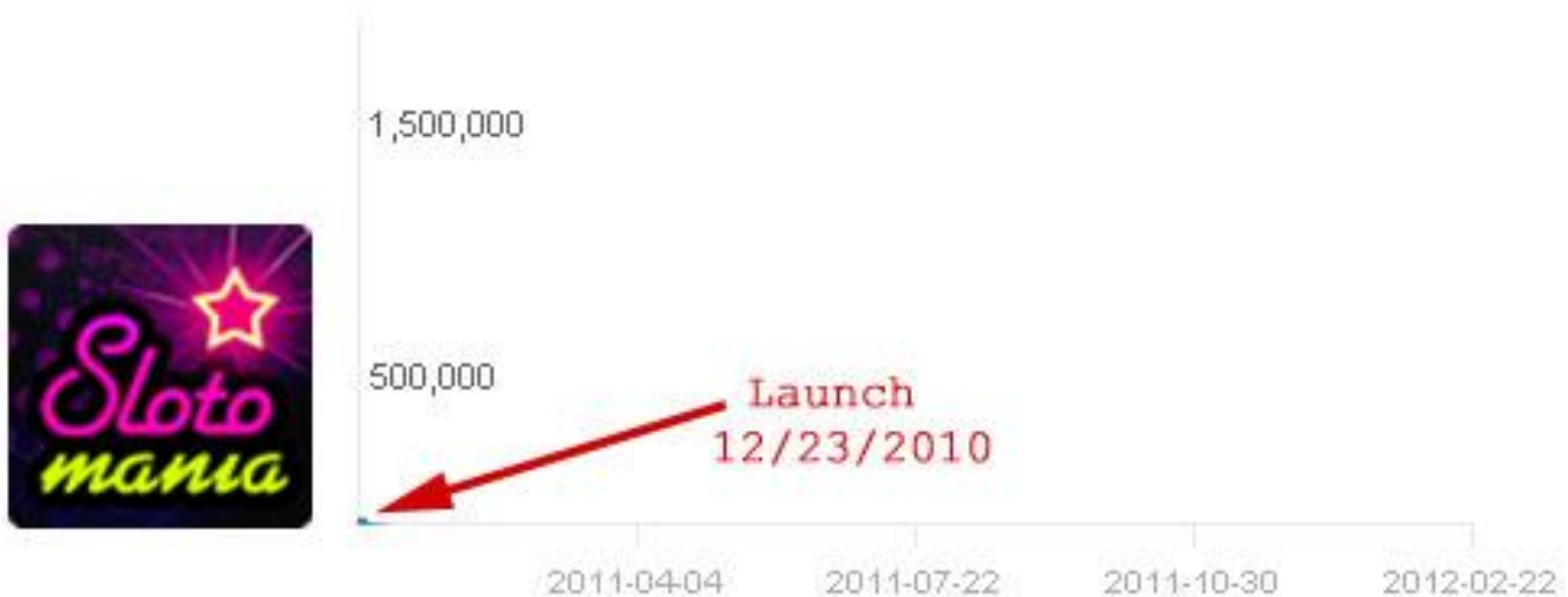


How is it viral?



Is it retentive?

Unique Daily Active Users



Is it retentive?

Unique Daily Active Users



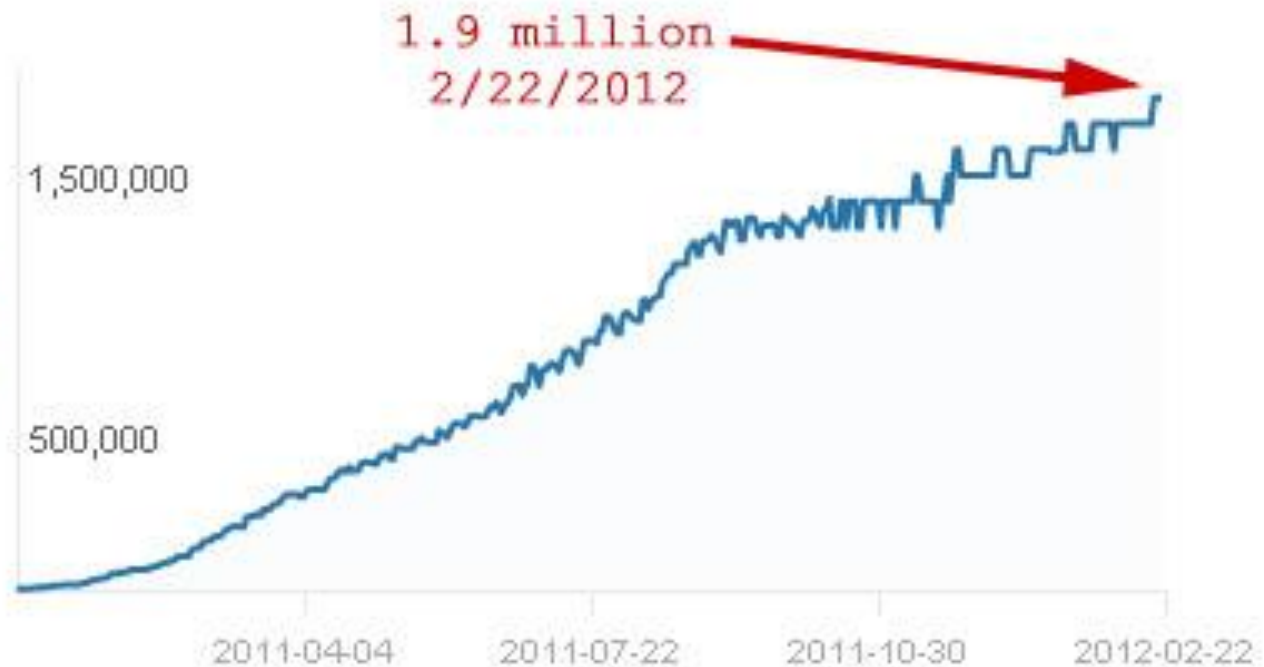
Is it retentive?

Unique Daily Active Users



Is it retentive?

Unique Daily Active Users







NEXT BONUS:
3:59:09

399.85

ADD
COINS

LUCKY GEM
CASINO

Beginner Spinner

15 XP

ASK FOR COINS

SHARE COINS

INVITE FRIENDS

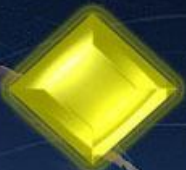
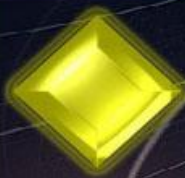
1/43

0/110

BEJEWELLED
SPIN

4
10
2
6
9
1
8
7
3
11
5

15
19
13
16
17
12
18
20
14



Bet 1 x 0.15

Win 0.00

Choose your lines, then click SPIN to play!

Coin Size

0.15

PAYTABLE

BET ONE

BET MAX

SPIN

BINGO!

1	2	3	4	5
17	45	51	69	
1	15	33	48	73
19	★	60	72	
1	40	54	67	
10	32	49	68	

B	I	N	G	O
1	16	31	46	61
2	17	32	47	62
3	18	33	48	63
4	19	34	49	64
5	20	35	50	65
6	21	36	51	66
7	22	37	52	67
8	23	38	53	68
9	24	39	54	69
10	25	40	55	70
11	26	41	56	71
12	27	42	57	72
13	28	43	58	73
14	29	44	59	74
15	30	45	60	75

Shop

1	Troy	764,621
2	Laralyn	752,811
22	Bruce	389,791
	Reach	100,000
24	Steven	61,900

Lessons

- This is a popular genre
- Growth opportunity
- Entry possibility for a small player
- Companies are positioning for potential legalization

Game #2: Zombie Lane



What is Zombie Lane?

Arguably:



+



How Similar?



How Similar?



What's Different?



ZOMBIE HORDE

because one just ISN'T enough

Zombie Implications



Why Does This Matter?

- Frontierville mechanics = very casual
- Zombies = errrrr.....a little more blue

Results?

- 1.4M Peak DAU
- Still in live ops 1 year later

And More



700K Peak DAU



7M Peak DAU

Learnings

- Blue themes can overlay on casual mechanics
- Significant audiences
- Boys like casual games too!

Game #3

The Casual Invasion



by King.com











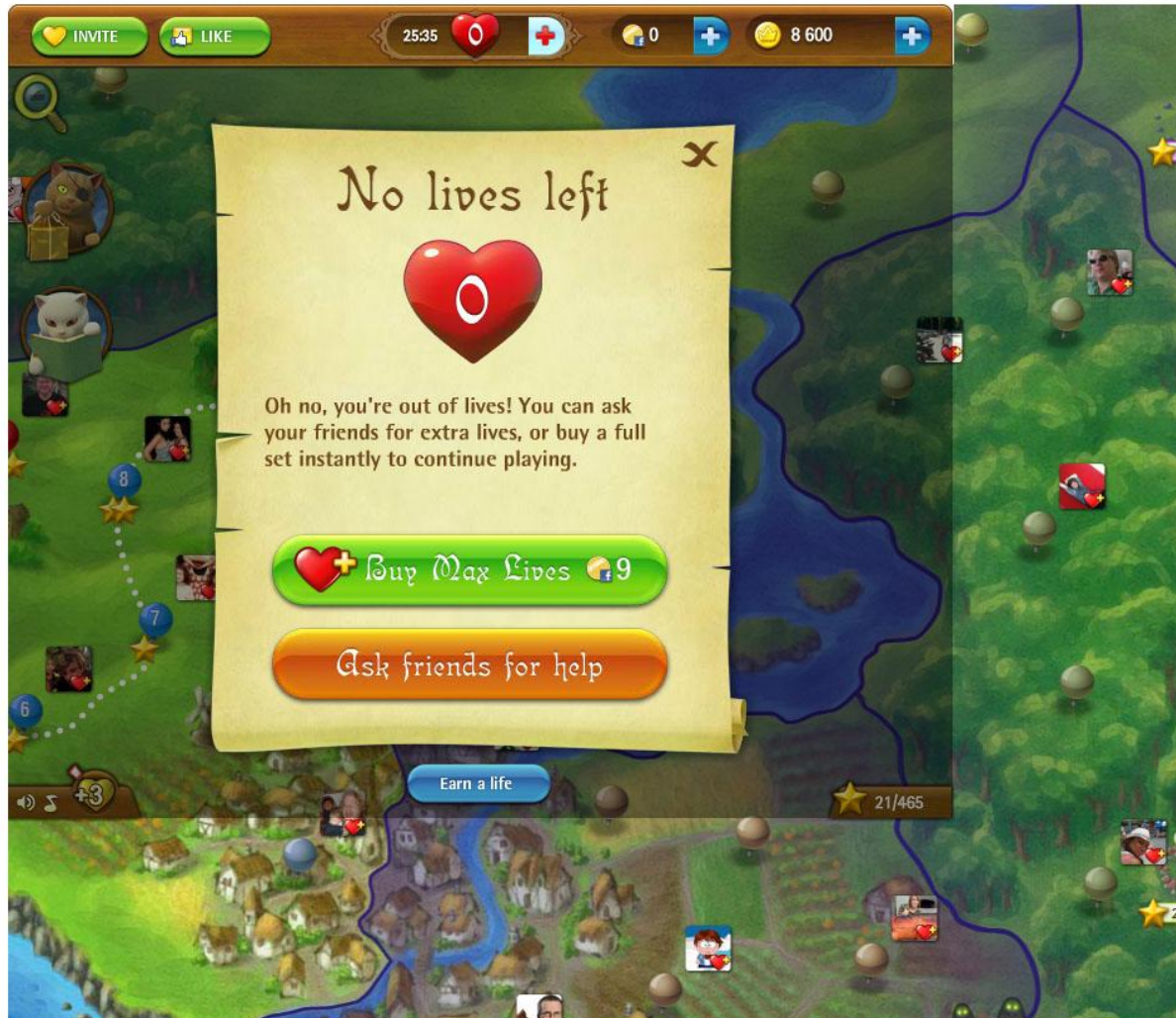




How does it monetize?



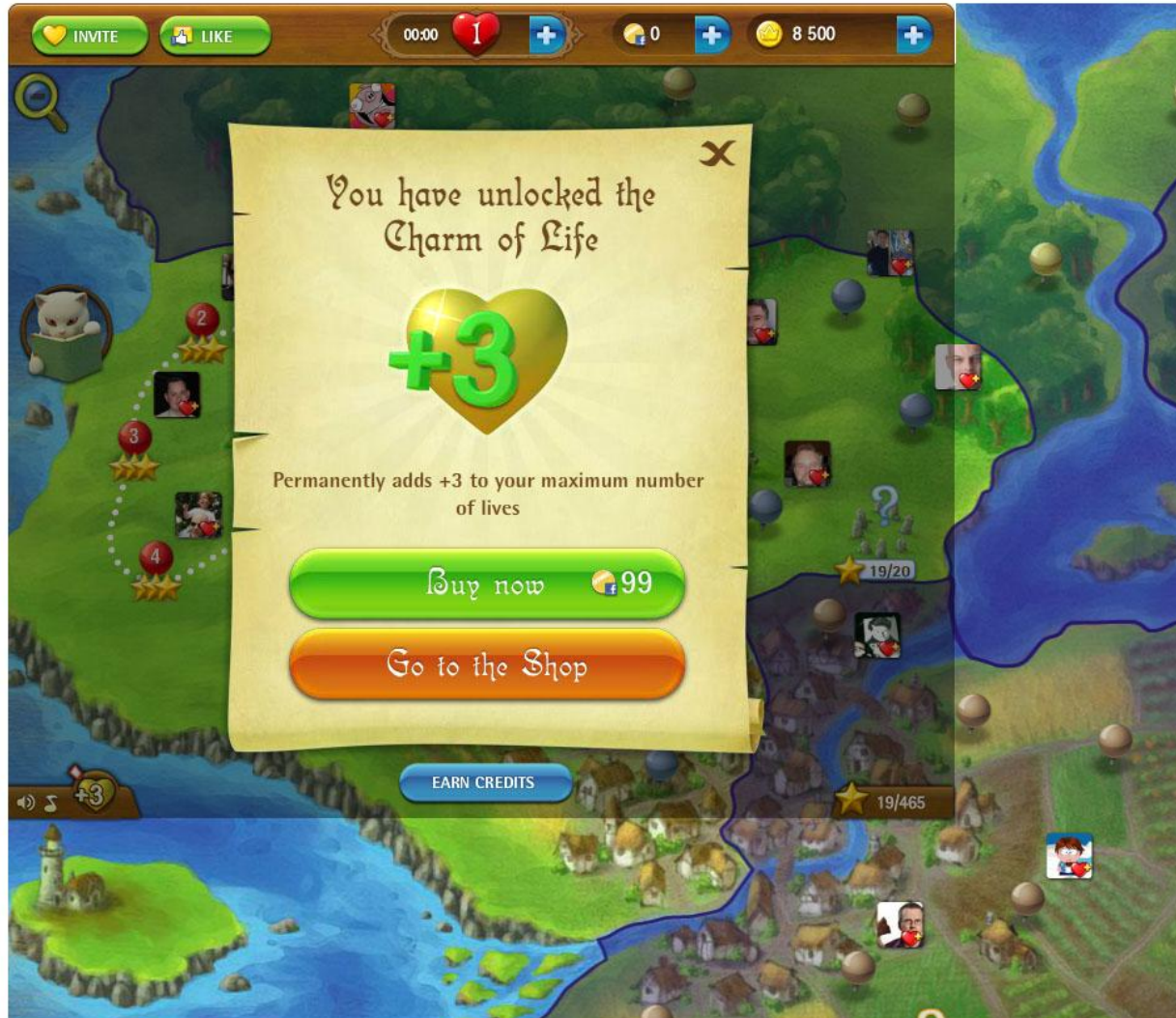
How does it monetize?



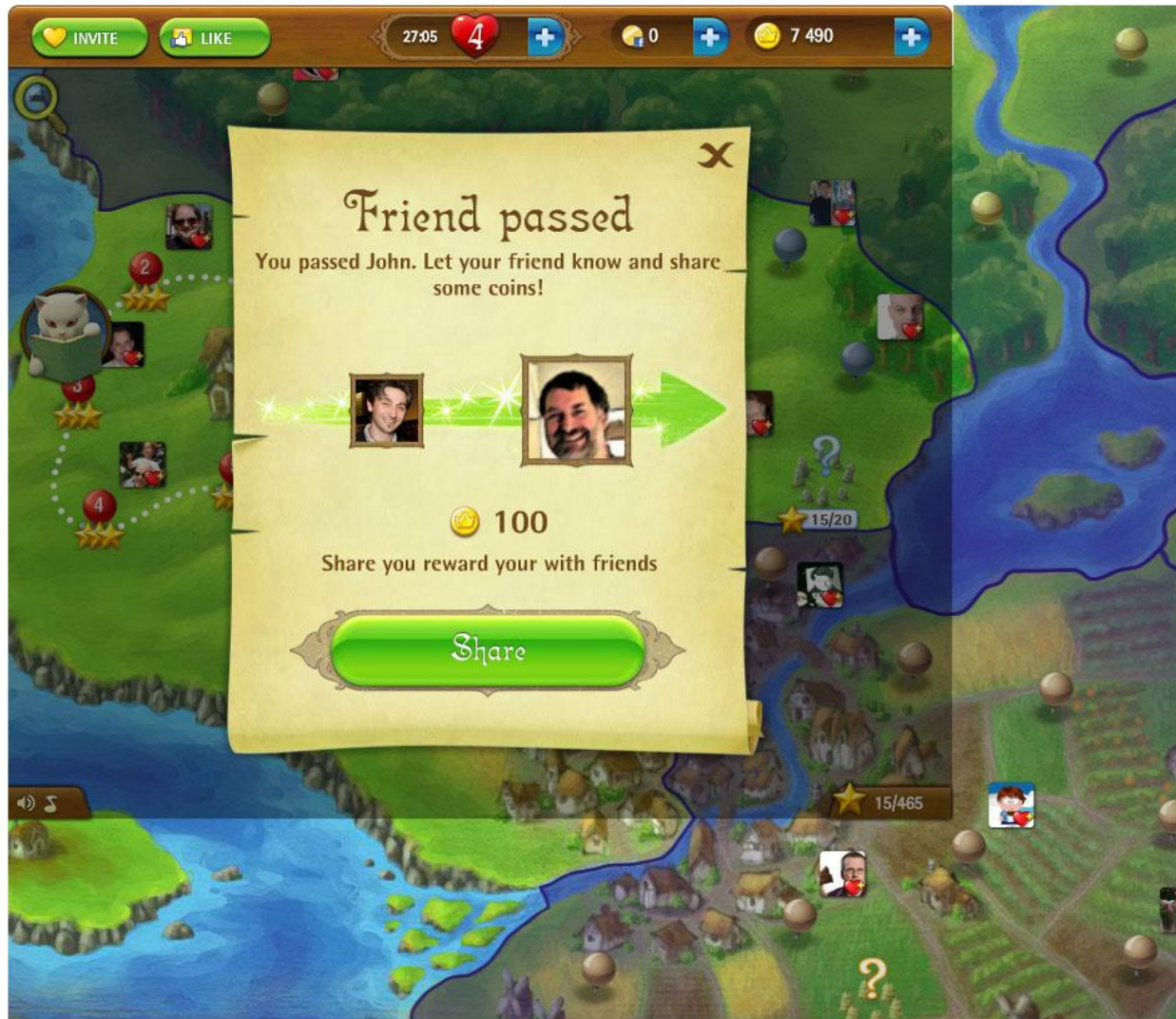
How does it monetize?



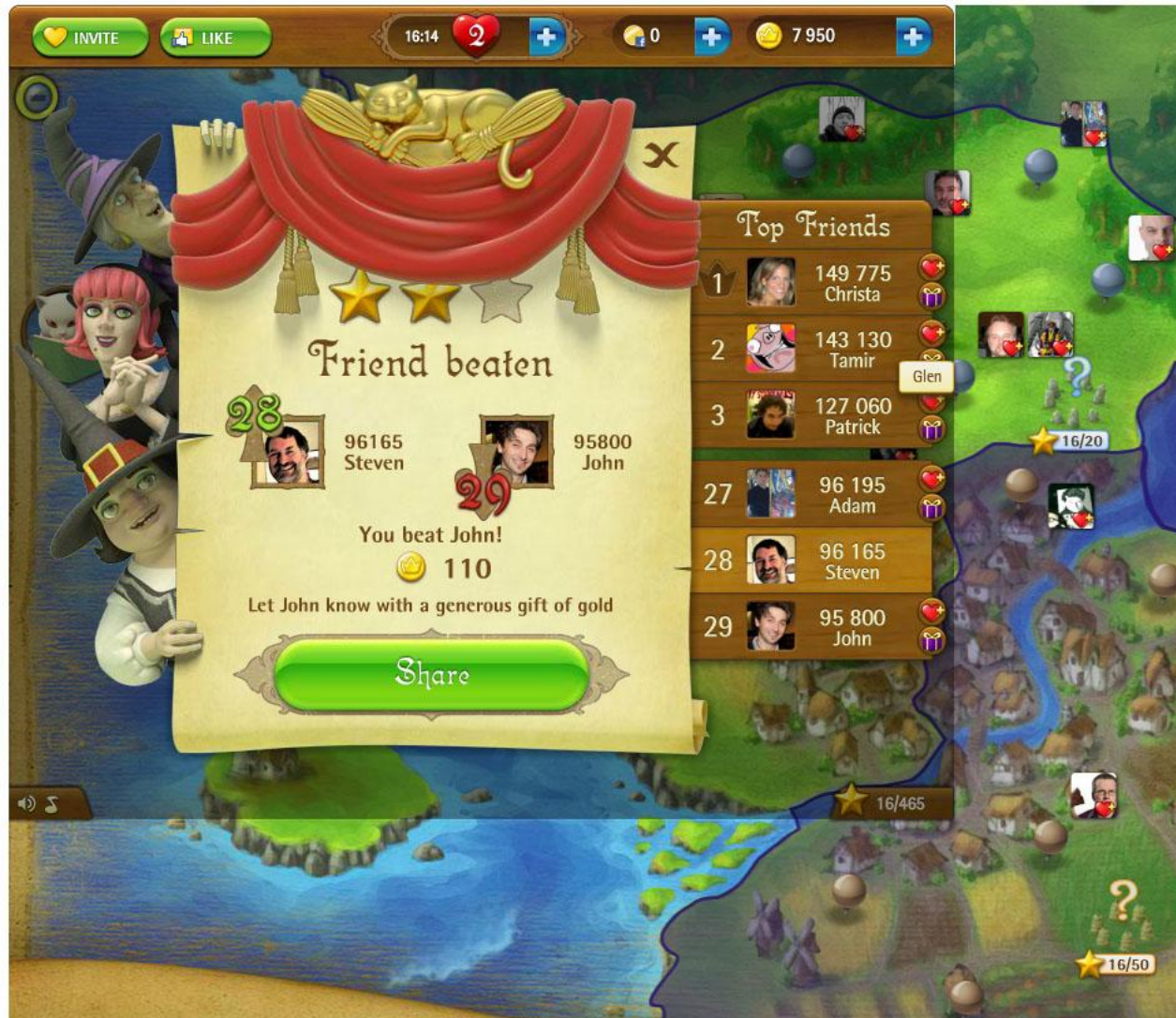
How does it monetize?



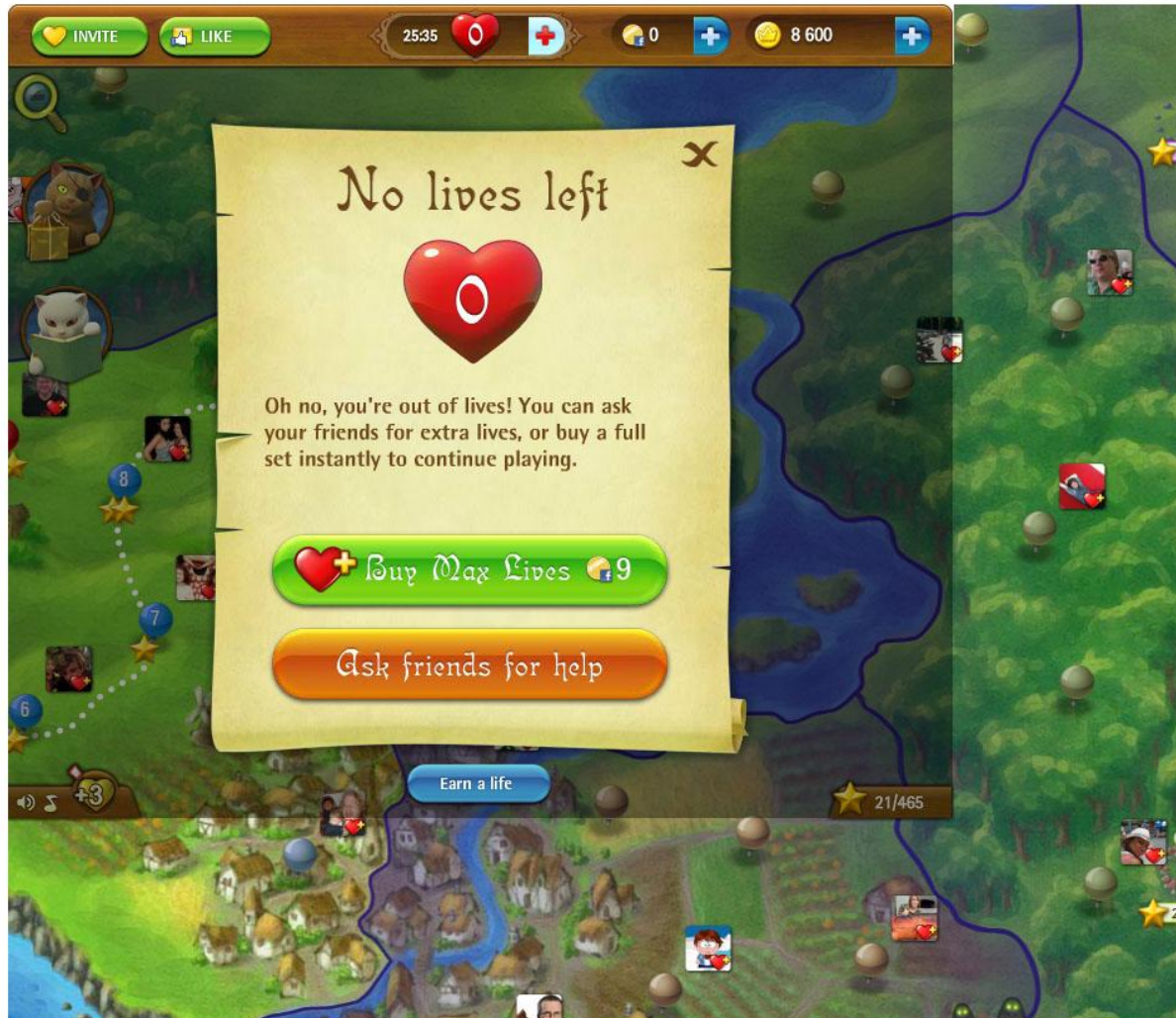
How is it viral?



How is it viral?

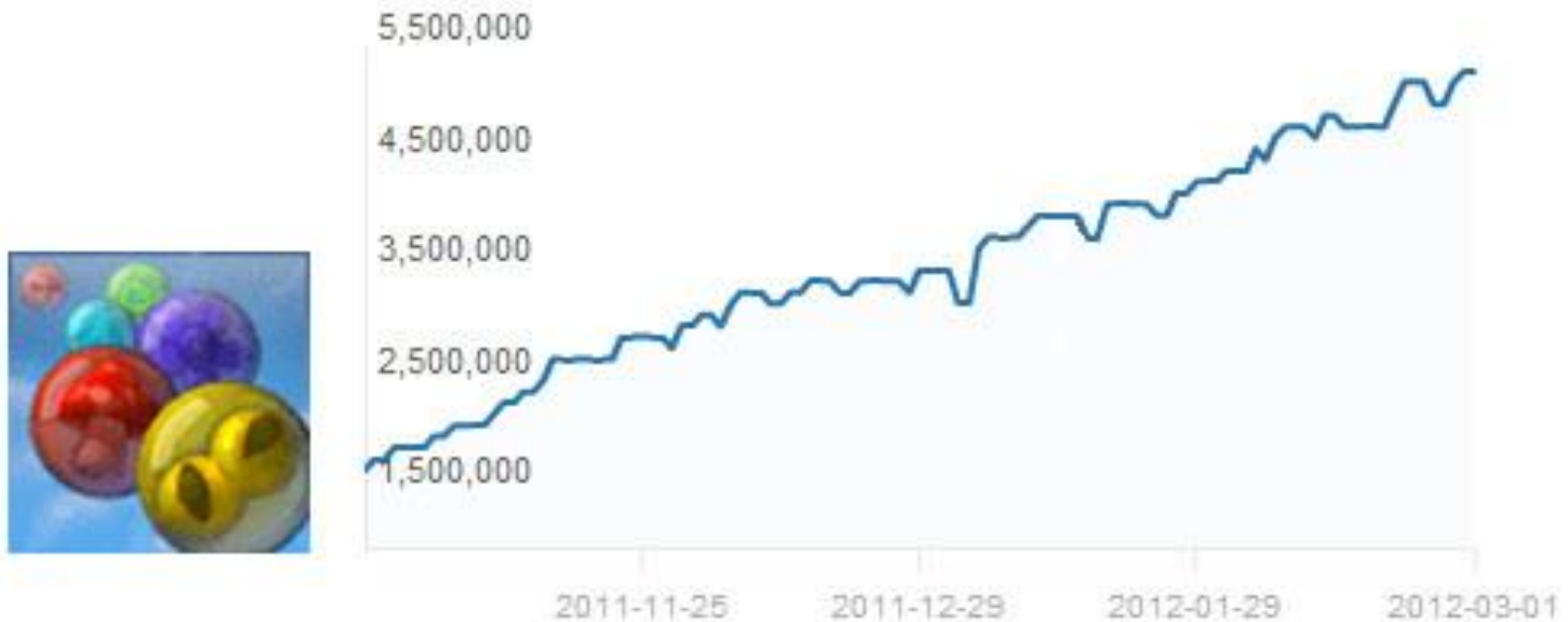


How is it viral?



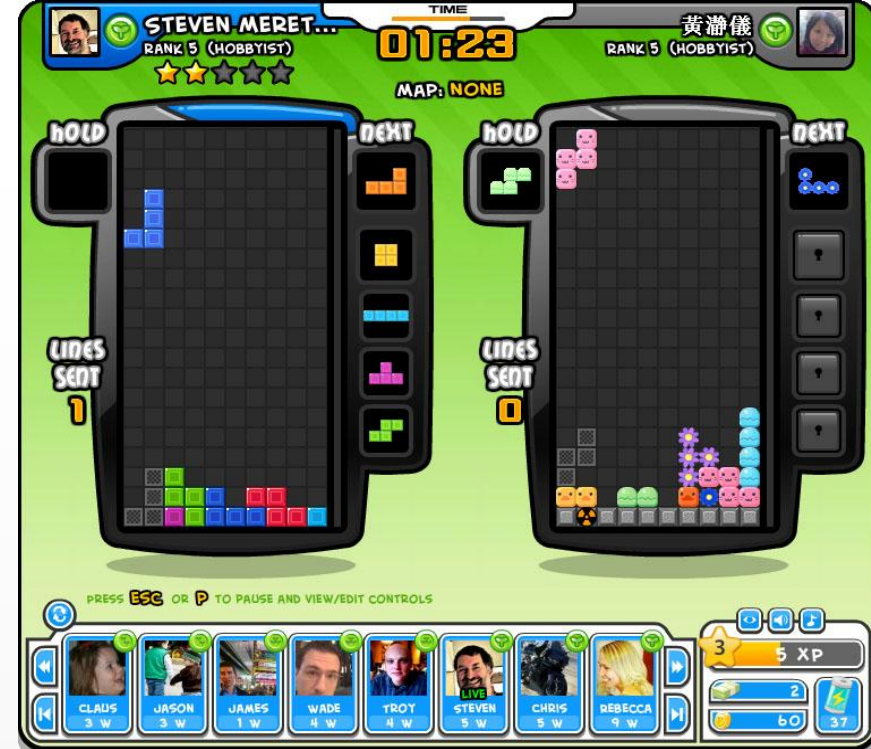
Why is it retentive?

Unique Daily Active Users



Why is it retentive?

- Balance of skill and luck
- Endless clear and achievable goals
- Casual competitiveness



Lessons

- Room for more than one entrant
- Lots of growth...
- ...but potential for more



Game #4: Gardens of Time



What is Gardens of Time?



Not the First



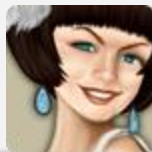
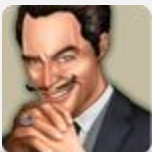
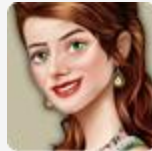
Why the Massive Success?



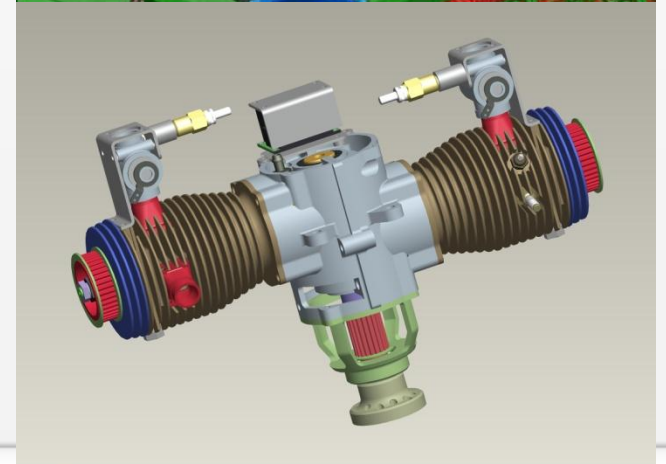
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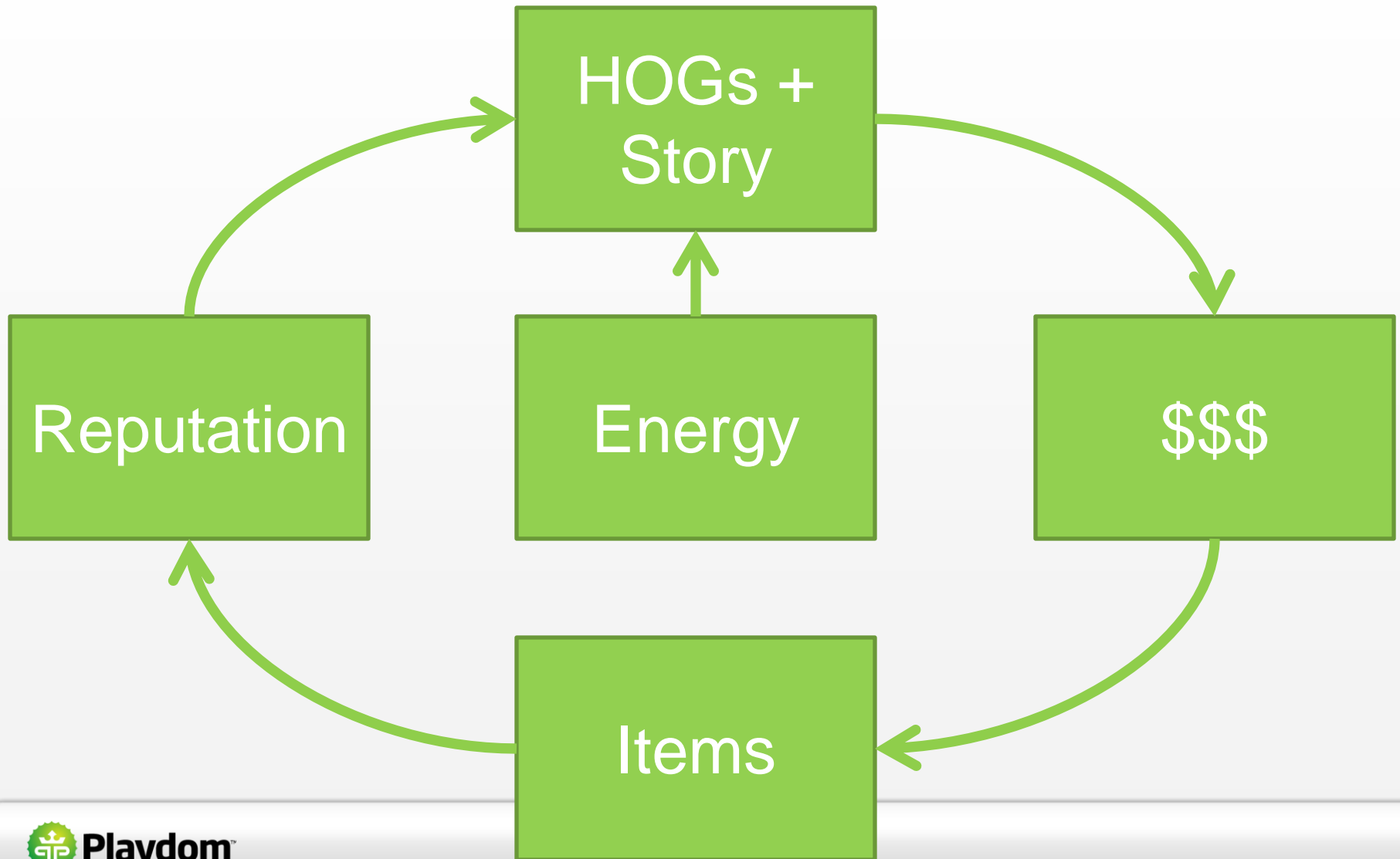
+



+



In Other Pictures



Casual Downloads

 **Top 10
PC Downloads**

1		The Agency of Anomalies: Cinderstone Orphanage Collector's Edition
2		Witches' Legacy: The Charleston Curse
3		Depths of Betrayal Collector's Edition
4		Fantastic Creations: House of Brass Collector's Edition
5		Mystery Trackers: Black Isle Collector's Edition
6		Grim Tales: The Legacy
7		Surface: Mystery of Another World
8		Curse at Twilight: Thief of Souls
9		All My Gods
10		Natural Threat: Ominous Shores

 [See All 100](#)

Facebook Players



How'd It Do?

- 4M Peak DAU
- #3 game on FB
- 23% DAU/MAU

And More...



Steady 7.2M
DAU



Just
Launched...

And Many, Many More...

Learnings

- HOGs have a place
- Takes real craft
- Big wins
- Serial consumption/Parallel play

Game #5

IP Badly



by EA-Playfish



\$613K	Need Good Neighbors?	\$813K	\$833K	\$1.1M	\$1.9M	\$2.1M	\$
Troy	Fay	Emily	Eugene	Roxanne	Michael	Jay	MR. MONOPOLY
1	Invite Me!	1	1	1	1	1	



<p>\$613K</p> <p>Troy</p> <p>1</p>	<p>Need Good Neighbors?</p> <p>Jeff</p> <p>Invite Me!</p>	<p>\$813K</p> <p>Emily</p> <p>1</p>	<p>\$833K</p> <p>Eugene</p> <p>1</p>	<p>\$1.1M</p> <p>Roxanne</p> <p>1</p>	<p>\$1.9M</p> <p>Michael</p> <p>1</p>	<p>\$2.1M</p> <p>Jay</p> <p>0</p>	<p>MR. MONOPOLY</p>
---	---	--	---	--	--	--	----------------------------



Collect property cards to upgrade your building







What worked?

- Really captured the look and feel
- Easy to learn
- Dice rolls = energy
- Inherently social

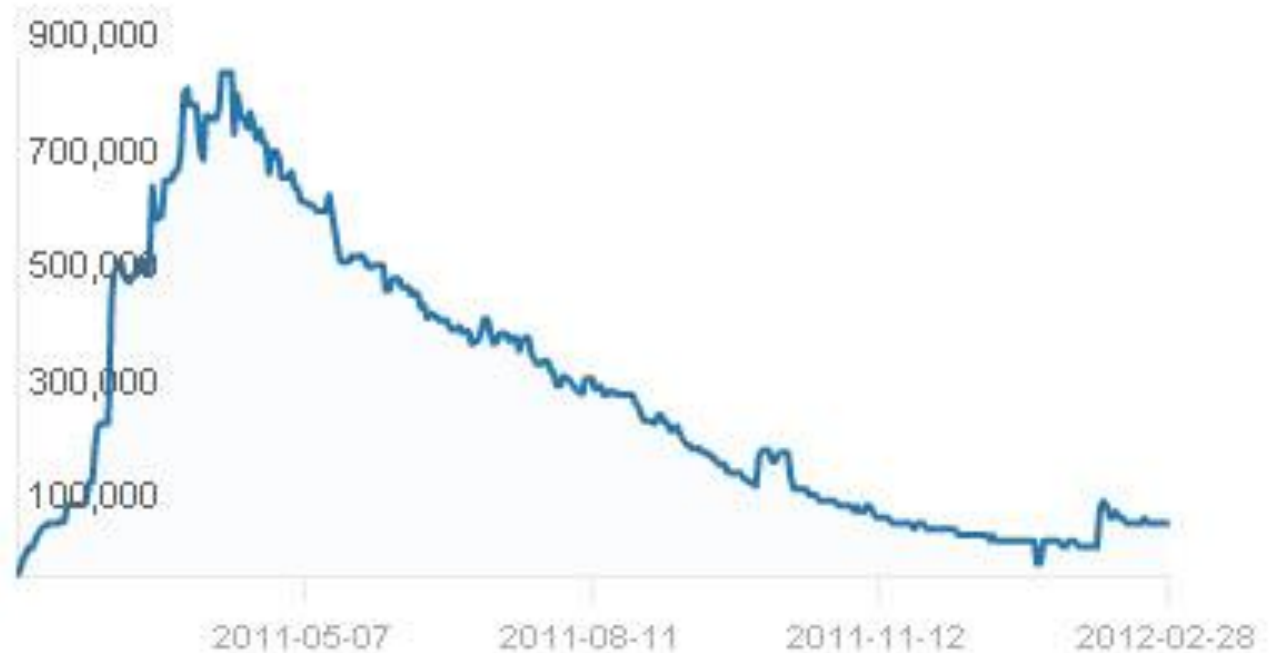
What didn't work?

- Cooperative? Or competitive?
- No differentiation
- No elder gameplay

Unique Daily Active Users



Unique Daily Active Users





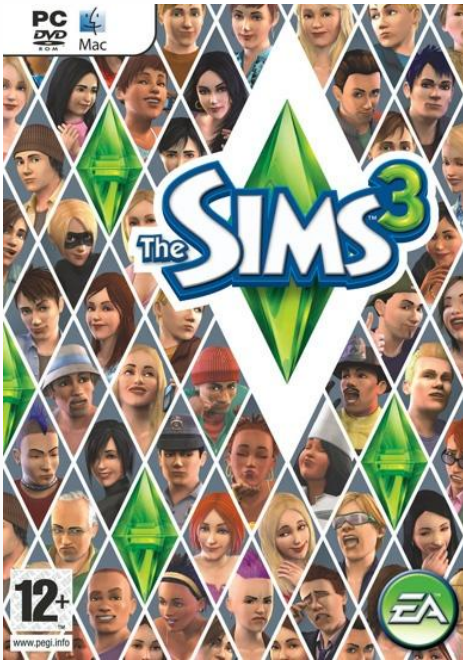
Lessons

- IP is great for UA...
- ...but it won't keep 'em around
- Game development is hard...
- ...and social game development is even harder

Game #6: The Sims Social



What Is The Sims Social?



+



+



= Proof that IP can work!

Sims



Simple



Familiar



Great Viral/Social Play



Ask different Sims if they know directions to Littlehaven Shores

0/5

SKIP +25

More Games



NOTE: This is a cricket. Not a cockroach. Thank you for asking.

Learnings

- Yield can be amazing
- Category killing
- Right IP, right execution, right support

Game #7

Belly Up to the Production Bar



by Zynga

DOWNS

NEW QUEST!

Click to Fish

Florin

ADAM

ADD FRIEND

ZEB

2237

MARK

2295

BRIAN

2415

ROXANNE



2432

JAY

2579

ELIZABETH

3275

BROOKE

3656

GEOFFREY

7937

WORKSHOP



Energy Totem

Increases your energy max by 3!



46.7 hrs

Make



0/40

Ask



5



0/30



8



0/15

Post to Friends



7



0/10



19

Exploration Crystal

Crystals let you explore



1.5 hrs

Make



50/3



Florida

MARK

BRIAN

ROXANNE

JAY

ELIZABETH

BROOKE

GEOFFREY

THANKS FOR VISITING!



Thanks for visiting Mark!
You have earned some great
rewards:



SHARE ENERGY



21

8

Not Allies ?

4

More in: 23:59:01

Kingdom of Ryllian

ADAM

I'M PLAYING!

ADD FRIEND



ADD FRIEND

ZEB



2237

MARK



2295

BRIAN



2415

ROXANNE



2432

JAY



2579

ELIZABETH



3275

BROOKE



3656

GEOFFREY



7937



21

8

26

244

Florin

ADAM

I'M PLAYING!

ADD FRIEND



ADD FRIEND

ZEB



2237

MARK



2295

BRIAN



2415

ROXANNE



2432

JAY



2579

ELIZABETH



3275

BROOKE



3656

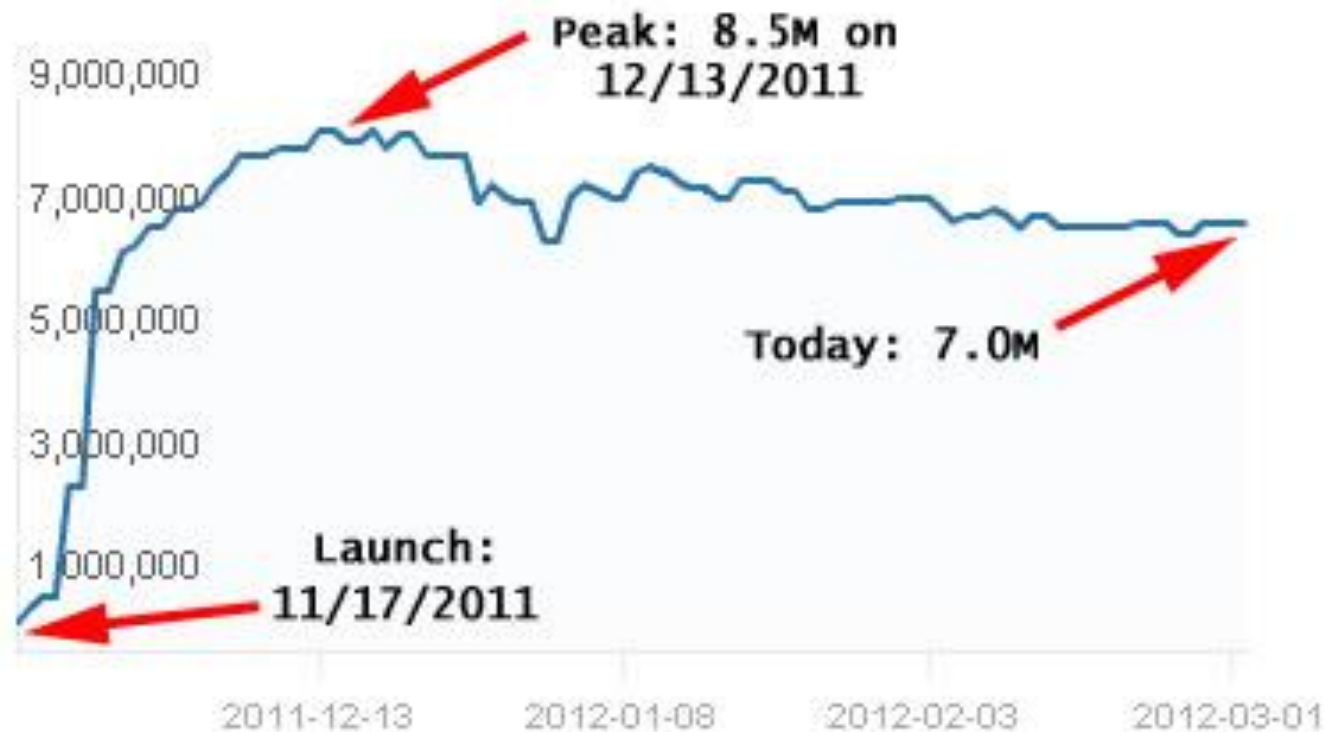
GEOFFREY



7937

How's it doing?

Unique Daily Active Users

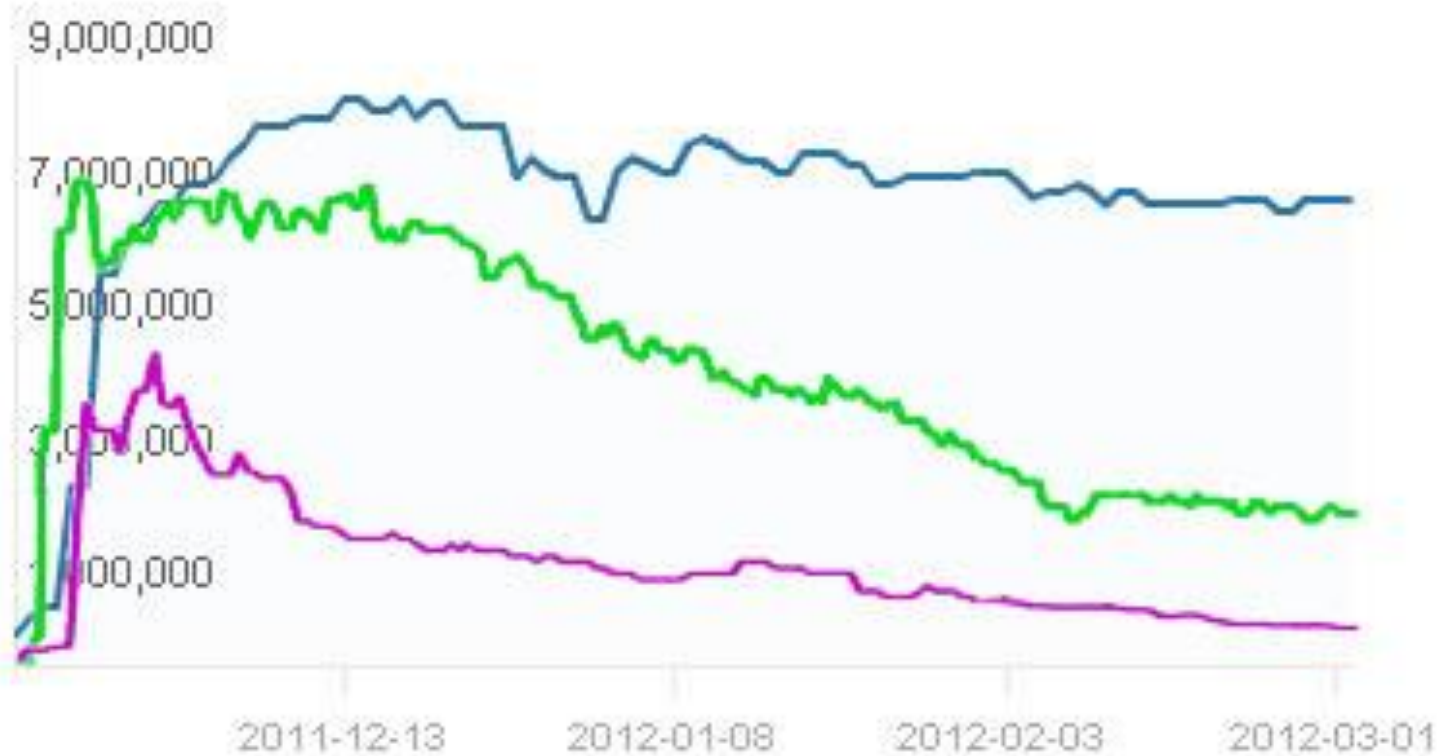


Unique Daily Active Users

Castleville

Empires & Allies

Adventure World



From Zynga's press release of 10/11/2011:

CastleVille raises the bar on the production value of the "Ville" brand, with epic storytelling, highly detailed art and animation, and a completely original musical score that was recorded with a 75-piece orchestra and full choir.

299,675 + 12,954 + 3,995 + 27/39 39 118,504 / 119,182

0 +

Marta's Small City

Rank
26

Mark	Cynthia	Brooke	Elizabeth	Steven	Ross	Marta	Muninn
							
6	10	13	27	39	56	64	77



Return Home

Lessons

- The market is maturing
- The production bar is rising (especially in established genres)
- This is *not* a newbie-friendly zone

Game #8: Social Empires



What Is Social Empires?



+



How Is It Warcraft?



How is it Cityville?



What's the Story?



Kingdoms of Camelot

By Kabam | [Visit Application](#)

Unique Active Users

View: **Daily** | Weekly | Monthly



Backyard Monsters

By KIXEYE | [Visit Application](#)

Unique Active Users

View: **Daily** | Weekly | Monthly



But Then...



Social Empires - Land of Dragons & Castles

By Social Point | [Visit Application](#)

Unique Active Users

View: **Daily** | Weekly | Monthly



Why The Big Result?

- Better execution of combat mechanic
- Flawless execution of core social mechs
 - Crewing
 - Gifting
 - Alliance Bonus
- Super-cute art style
- Great monetization support UA
 - Super buildings (offense, defense, resource troops)
 - Town expansion
 - PvP
 - Scenario packs

And More...



320K and growing



300K and growing
fast

Learnings

- More developers coming in
- Even more players coming in
 - High monetizers
- Winners win big
- Still room to get big

Game #9

Publish or Perish



TripleTown

by Spry Fox





store

3,202

5,980



14,020 to Outpost
29%



place a grass
95 moves left

Invite a friend to play

Weekly Rank

	Ron Meiners 1,057,395
	Alif Khalfan 1,010,645
	Linda Law 609,500
	Mirjam Eladhari 458,815
	Sande Chen 323,960

follow us!



COMBO: 3 =



store

3,202

6,005



13,995 to Outpost
30%



place a bear
99 moves left



Invite a friend to play

Weekly Rank

Ron Meiners
1,057,395

Alif Khalfan
1,010,645

Linda Law
609,500

Mirjam Eladhari
458,815

Sande Chen
323,960

follow us!



Bear: Blocks your moves. Turns into a Tombstone when trapped.



store

3,202

495



19,505 to Outpost
2%



place a grass
137 moves left

Invite a friend to play

Weekly Rank

	Ron Meiners 1,057,395
	Alif Khalfan 1,010,645
	Linda Law 609,500
	Mirjam Eladhari 458,815
	Sande Chen 323,960

follow us!



Grass: + + =



3,202

1,120



18,880 to Outpost
5%



place a grass
136 moves left

Invite a friend to play



Weekly Rank



Ron Meiners
1,057,395



Alif Khalfan
1,010,645



Linda Law
609,500



Mirjam Eladhari
458,815



Sande Chen
323,960



follow us!



Hut: + + =





3,202

24,440



25,560 to Hamlet
14%



place a grass
34 moves left



Invite a friend to play

Weekly Rank

	Ron Meiners 1,057,395
	Alif Khalfan 1,010,645
	Linda Law 609,500
	Mirjam Eladhari 458,815
	Sande Chen 323,960

Enter the publisher...



3,202

150 moves left

Hint: click and drag to look around



How does it monetize?



How does it monetize?



How is it viral?

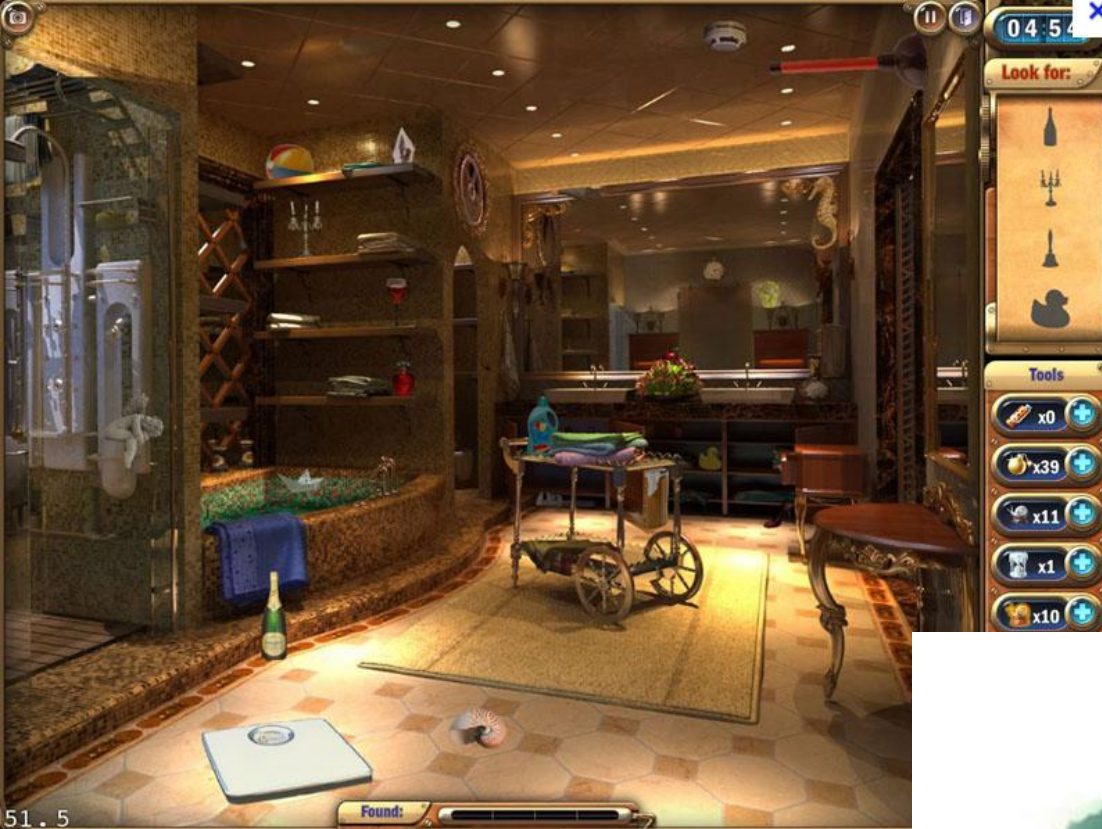


How's it doing?



Unique Daily Average Users





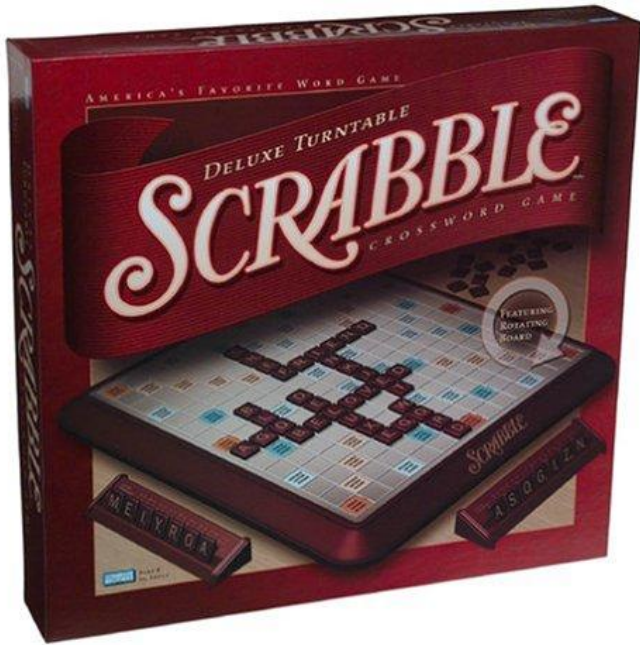
Lessons

- Publishing is coming (pros and cons)
- Innovation isn't a magic bullet [sob!]
- Developers are not the audience

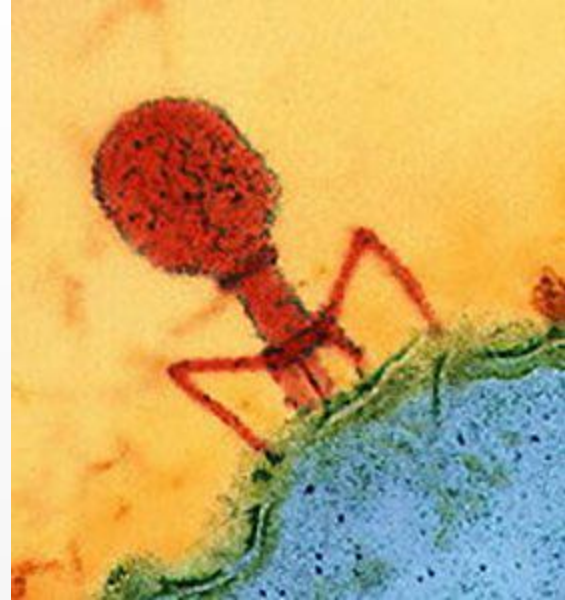
Game #10: Words with Friends



What is Words with Friends?



+



How Is It Scrabble?



For realzies?

How Is It Viral/Social?

The screenshot displays the Words With Friends app interface, highlighting its social features. On the left, a 'Suggested Friends' list is circled in red, showing options to start a game with Aaron Loeb, Kat Townsend, and Christian Villanueva. Below this, a 'Game Over' section lists recent matches, including one where Summy16 beat the user. The central part of the screen shows a word search grid with letters like F, J, I, G, Q, I, O, R, M, U, N, A, N, E, H, T, A, O, S, D, W, H, E, X, L, N, T, E, N, D, E, R, S, V, I, T, I, D, Y, C, U, E, L, A, W, P, I, S, T, O, L, N, A, R, M, Y, U, U, K. On the right, a notification from Dave Rohrl is shown, stating '45 seconds ago via Words With Friends' and 'Check out my move in Words With Friends! apps.facebook.com'. Below the notification, a 'Send a challenge to Rick Thompson' button is visible. At the bottom, a 'Your Move' section shows a list of moves, including one by Jeffery. A 'Their Move' section at the bottom right shows a move by Damon Pidhajecky. A red circle highlights a speech bubble icon in the top right corner of the app interface.

Suggested Friends

- Start a game with Aaron Loeb
- Start a game with Kat Townsend
- Start a game with Christian Villanueva

Game Over

- Summy beat you (Started July 29, 11:38am, Resigned 6 days ago)
- Dan Fitzpatrick beat you (Started July 15, 5:21pm, Resigned 7 days ago)
- Summy16 beat you (Started July 12, 10:05am, Resigned 7 days ago)
- Summy16 beat you (Started July 12, 2:38am, Resigned 7 days ago)
- You beat TheZombieGrrl (Started July 11, 11:18am)

Check out my move in Words With Friends!
apps.facebook.com
Like · Comment · Play Words With Friends

Send a challenge to Rick Thompson

Let Damon Pidhajecky know it is her turn

To: Damon Pidhajecky

Preview: Dave Rohrl sent you a Words With Friends request: I just finished my move and played "Jarred". Now it is your turn.

☒ Don't ask again before sending requests to Damon Pidhajecky from this app.

Send Request **Cancel**

Your Move

- Jeffery (Started February 27, 7:20pm)

Their Move

























Damon Pidhajecky (Started February 27, 7:20pm)

How's It Doing?

developerAnalytics **SEARCH** by appname

Top Applications

Displaying 1 - 25 of 156,277 results. [Next »](#)

	Application Name	Monthly Active Users	Daily Active Users	Reports
1	 BlackBerry Smartphones App	51,900,000	31,500,000	 Buy
2	 Microsoft Live	22,200,000	19,000,000	 Buy
3	 Yahoo!	20,000,000	9,700,000	 Buy
4	 Words With Friends	20,400,000	8,900,000	 Buy
5	 CityVille	16,000,000	8,500,000	 Buy
6	 Hidden Chronicles	33,100,000	7,100,000	 Buy
7	 CastleVille	28,800,000	7,000,000	 Buy
8	 Texas HoldEm Poker	33,500,000	6,700,000	 Buy
9	 HTC Sense	10,200,000	6,700,000	 Buy
10	 FarmVille	28,400,000	5,800,000	 Buy
11	 Bubble Witch Saga	15,400,000	5,200,000	 Buy
12	 Spotify	15,800,000	5,000,000	 Buy

Why?

- Ridiculously accessible
- Incredibly sticky
 - 43% DAU/MAU!!!!

Zynga iOS Turn Based



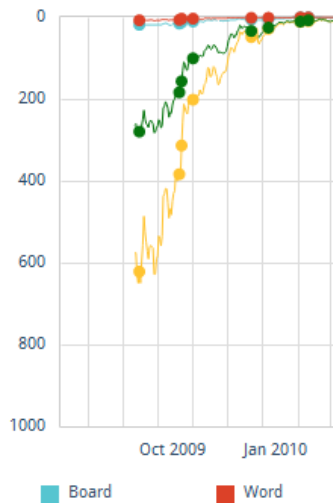
WORDS WITH FRIENDS

2.99 USD - by Zynga

Open in iTunes

Ranks

Grossing Ranks



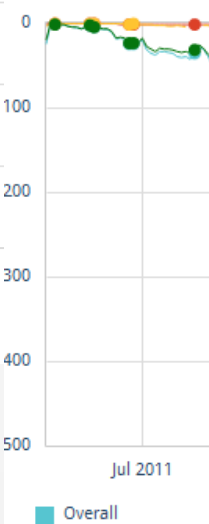
HANGING WITH FRIENDS

1.99 USD - by Zynga

Open in iTunes

Ranks

Gross



SCRAMBLE WITH FRIENDS

0.99 USD - by Zynga

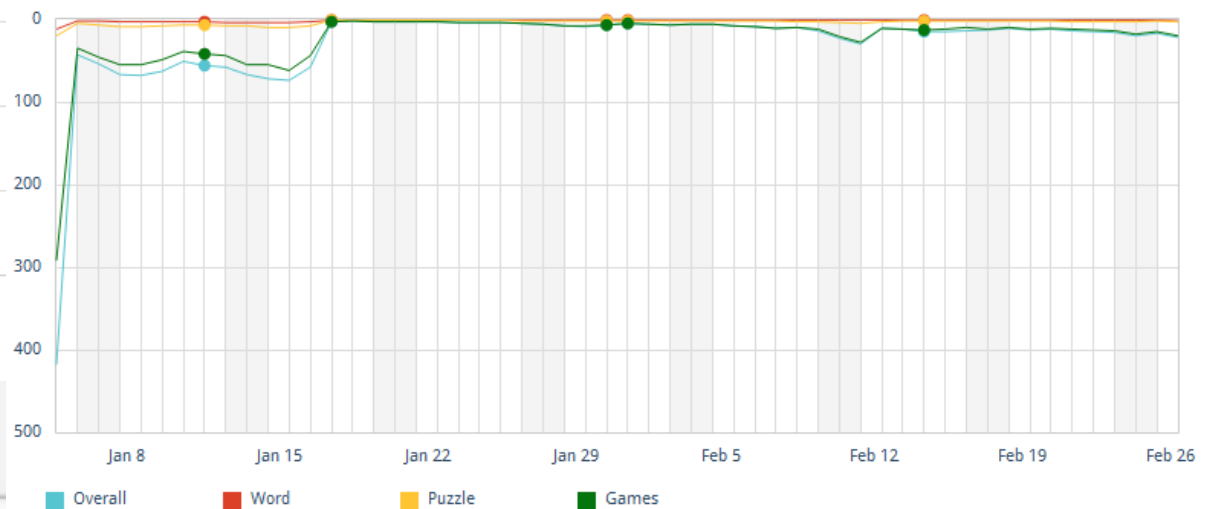
Open in iTunes

Ranks

Grossing Ranks

United States

Jan 5, 2012 — Feb 27, 2012



And Others



HERO ACADEMY

Free - by Robot Entertainment

Open in iTunes

Ranks

Grossing Ranks

United States

Jan 11, 2012 — Feb 27, 2012



DICE WITH BUDDIES

1.99 USD - by Stofle Designs

This is a Universal app. Open in iTunes

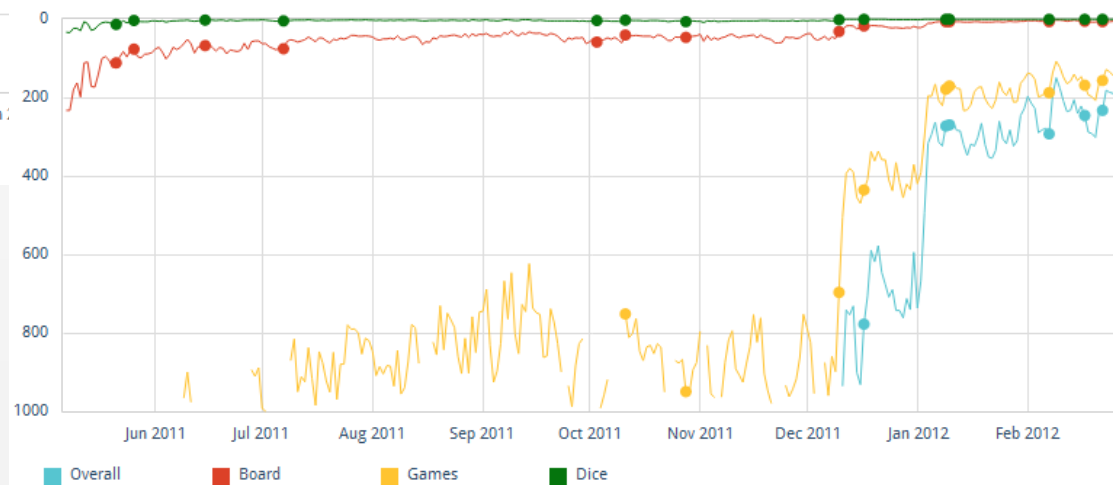
Ranks

Grossing Ranks

iPhone

United States

May 6, 2011 — Feb 27, 2012



Learnings

- Category proven on iOS
 - Zynga
 - Indies
- Other play patterns have crossed over
- #1 game on FB
- Look out for many more in 2012

Thank You!

- Smeretzky@playdom.com
- Drohrl@playdom.com

QUESTIONS?

Appendix #1

GAMES MENTIONED IN THIS TALK

Game	Company	Launch Date	Peak DAU	Weeks to Peak	Current DAU
Slotomania	Playtika	12/23/2010	1.9M	61 and counting	1.9M
Jackpotjoy Slots	iwi	7/6/2011	430K	26	390K
Bingo Blitz	Buffalo Studios	11/4/2010	1.1M	68 and counting	1.1M
DoubleDown Casino	DoubleDown Interactive	6/27/2010	1.4M	87 and counting	1.4M
Slingo	Zynga	2/20/2012	140K	2 and counting	140K
Lucky Gem Casino	PopCap-EA	2/26/2012	70K	1 and counting	70K
Zombie Lane	Digital Chocolate	3/13/2011	1.4M	12	300K
Frontierville	Zynga	6/12/2010	8.0M	23	replaced by Pioneer Trail
Army Attack	Digital Chocolate	5/26/2011	700K	3	160K
Empires & Allies	Zynga	6/3/2011	7.8M	2	2.4M
Bubble Witch Saga	King.com	10/25/2011	5.3M	18 and counting	5.3M
Bubble Saga	King.com	4/22/2011	1.4M	33	1.2M
Bubble Island	wooga	2/6/2010	2.7M	107 and counting	2.7M
Bubble Atlantis	SGN	10/24/2011	240K	8	210K
Tetris Battles	Tetris Online	8/6/2010	4.0M	81 and counting	4.0M
Diamond Dash	wooga	3/19/2011	4.6M	49 and counting	4.6M
Diner Dash	PlayFirst	2/9/2011	250K	10	shut down
Wheel of Fortune	GSN	9/9/2010	270K	21	100K
Gardens of Time	Playdom	4/18/2011	4M	16	1.6M
Treasure Quest	Big Fish	6/16/2010	35K	1	shut down
Mystery Manor	Game Insight	3/17/2011	600K	25	300K
Hidden Chronicles	Zynga	1/30/2012	7.5M	2	7.1M
Blackwood & Bell Mysteries	Playdom	3/1/2012	420K	1 and counting	420K
Monopoly Millionaires	EA-Playfish	2/2/2011	870K	9	90K
ESPN Sports Bar & Grill	Playdom	8/30/2011	120K	6	10K
The Smurfs & Co.	Ubisoft	8/13/2011	1.4M	3	400K
Indiana Jones Adventure World	Zynga	9/12/2011	5.2M	2	590K
The Sims Social	EA-Playfish	8/10/2011	11.3M	6	3.6M
CastleVille	Zynga	11/17/2011	8.5M	4	7.0M
Ravenskye City	LOLapps	10/11/2011	1.5M	5	770K
Social Empires	Social Point	1/8/2011	1.2M	60 and counting	1.2M
Wasteland Empires	West Coast Gamers	10/7/2011	80K	5	50K
Marvel Avengers Alliance	Playdom	2/29/2012	230K	1 and counting	230k
Triple Town	Spry Fox	10/12/2011	50K	20 and counting	50K
Word with Friends	Zynga	6/6/2011	9.1M	37	8.9M