The Year in Free-to-Play Games

GDC – March 17, 2014

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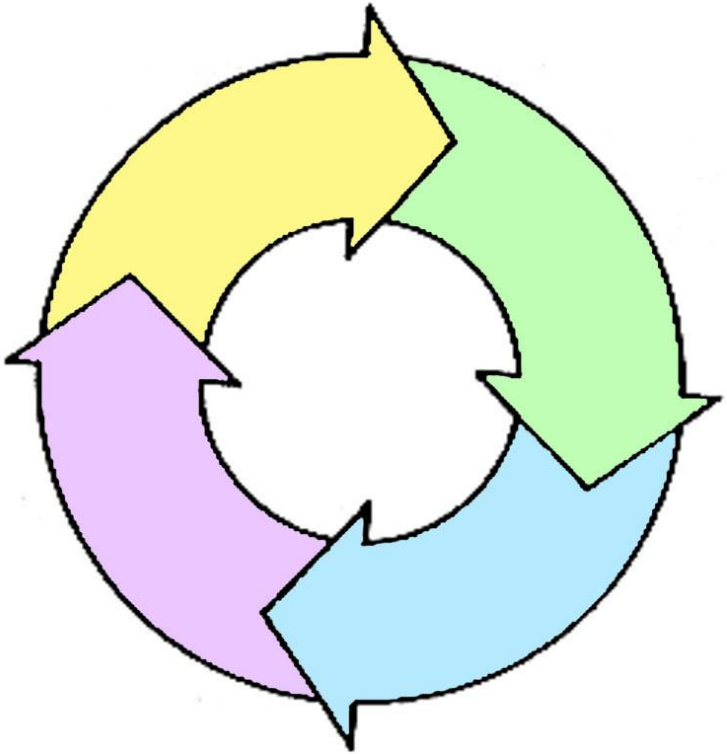
Juan Gril, Joju Games
Steve Meretzky, GSN Games

Welcome!

- Please silence your noisemakers
- Respond to the email survey

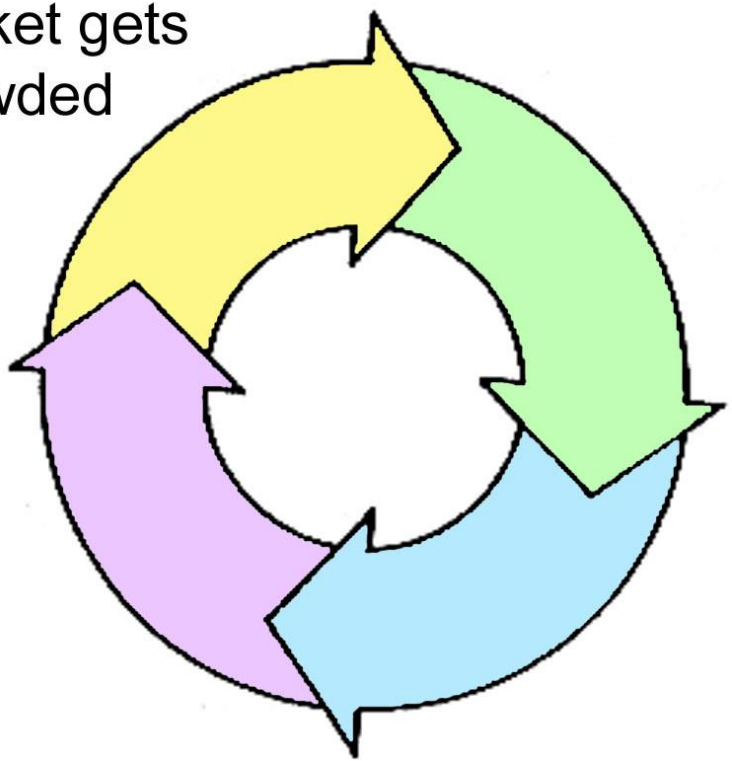
Free-to-Play:
From Infancy to Maturity

Characteristics of a Mature Market



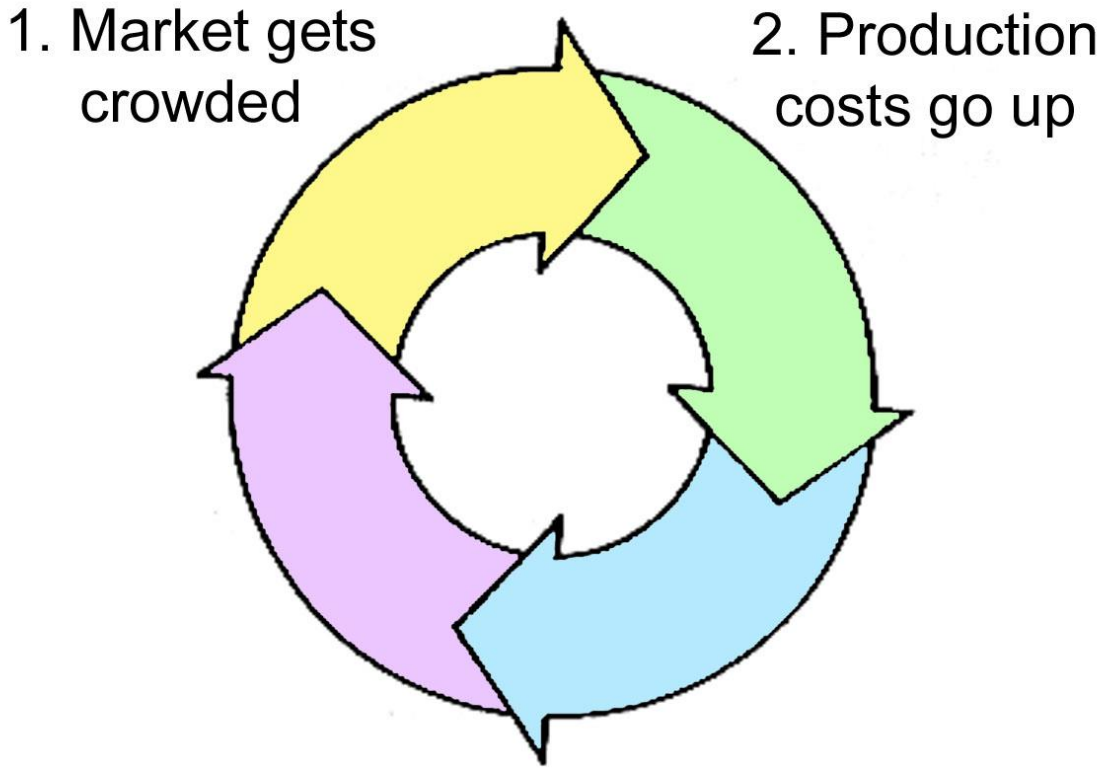
Characteristics of a Mature Market

1. Market gets crowded



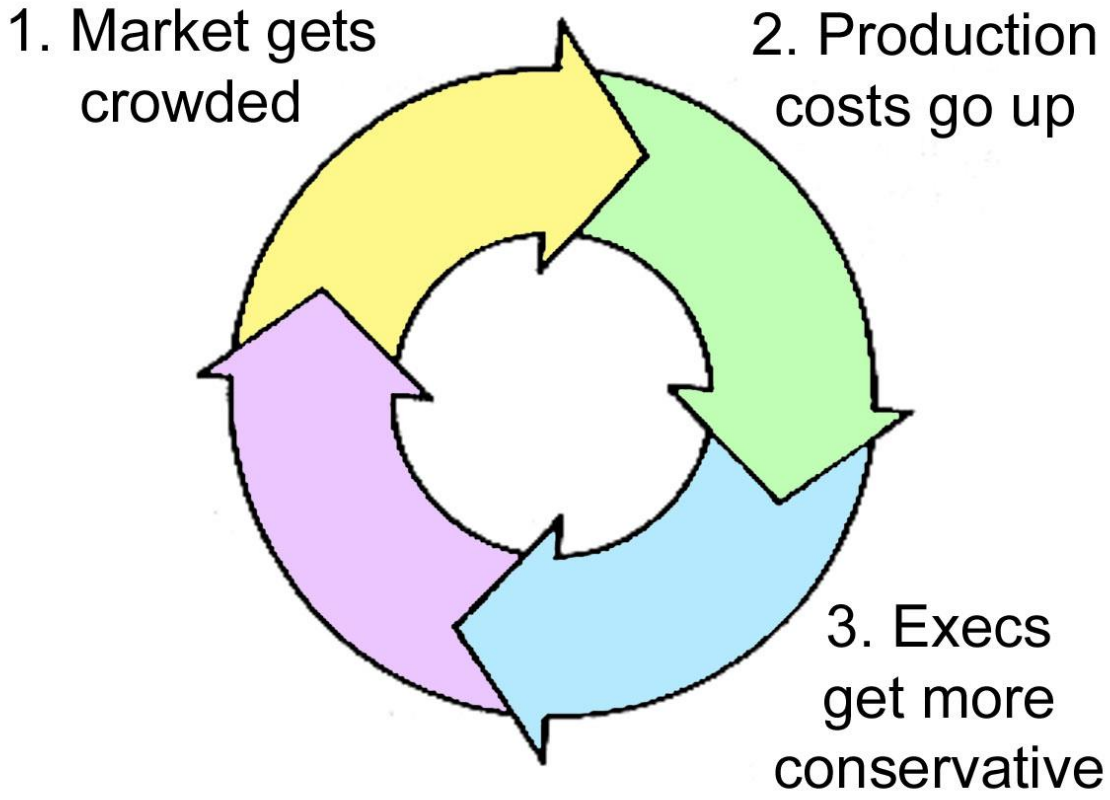
Evernote
iTunes
Chanel
Huffin...Post
RjDj Album
Pageonce
Poll Tracker
nyc weather
SGN Golf
LiveView
Air Mouse
Shopper
tvChatter
Things
Stocks
Things
LiveView
Yahoo!
colerendar
Quordy
Flickr
Remote
Calculator

Characteristics of a Mature Market

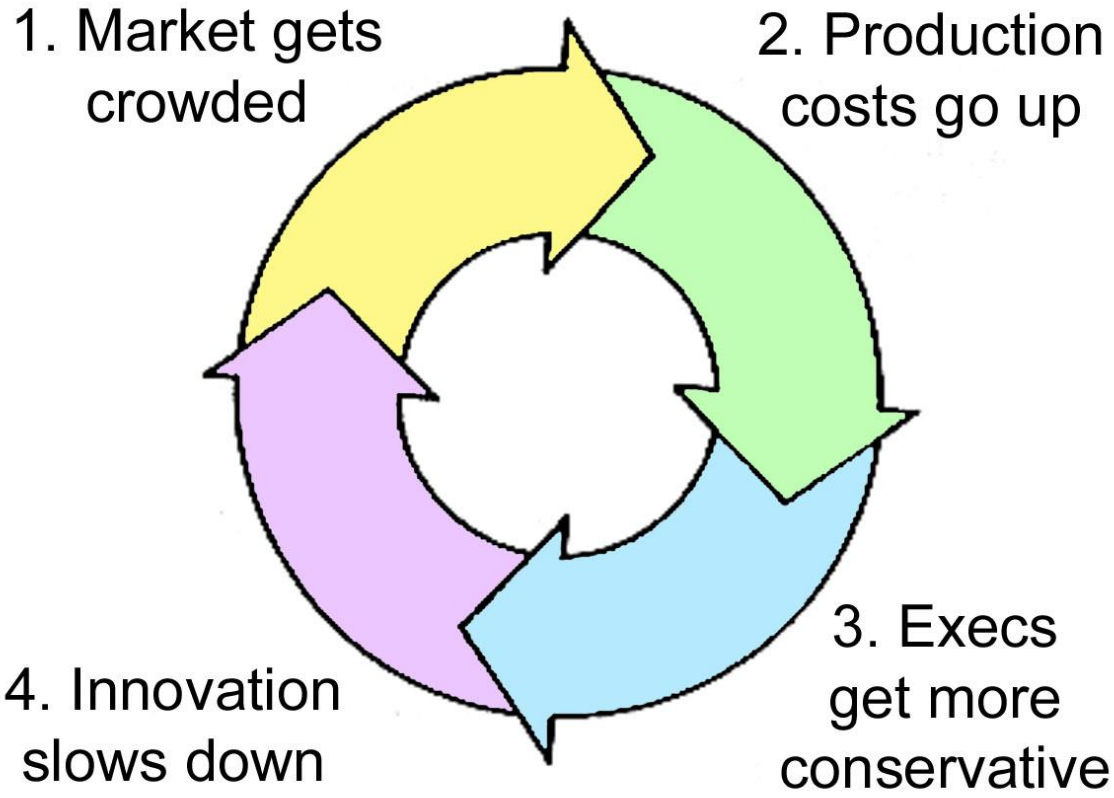


COSTS

Characteristics of a Mature Market



Characteristics of a Mature Market



Characteristics of a Mature Market

- Innovation → incremental improvements
- Fewer new genres
- Fewer new entrants

New Format

- A deep dive into six F2P genres
- What incremental innovation is occurring…
- …and how it can help you succeed in this space

Part One

OVER-BUILT

from Zynga

#2 on Facebook

from Supercell

#9 on iPhone
#6 on iPad
#4 on Android

from Social Point

#16 on iPhone
#22 on iPad
#20 on Android

from EA Mobile

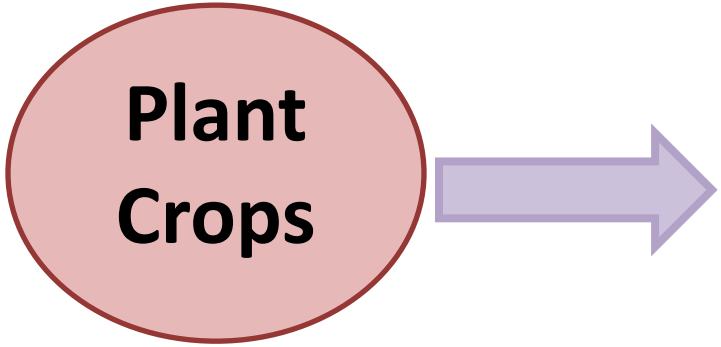
#17 on iPhone
#20 on iPad
#8 on Android

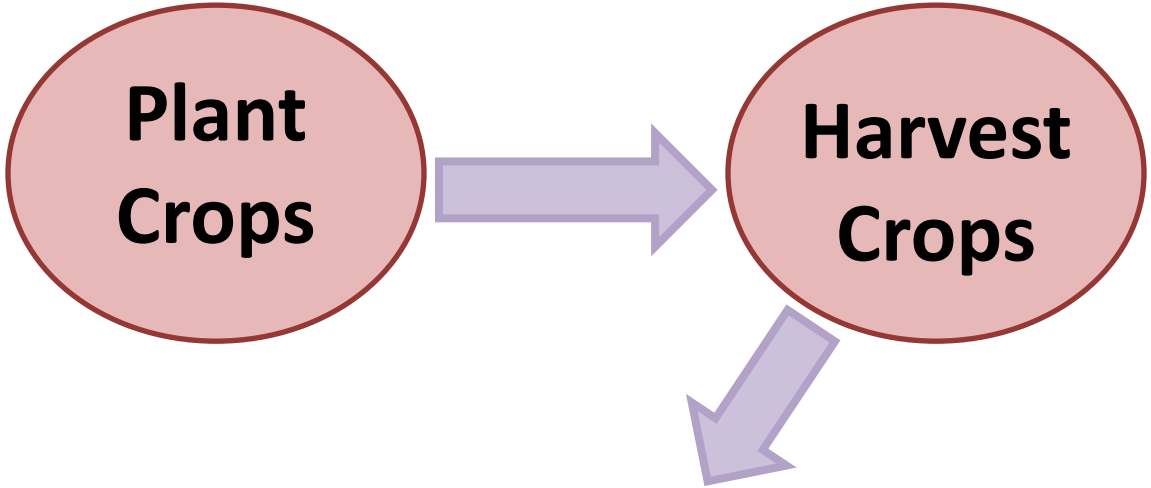
In Common

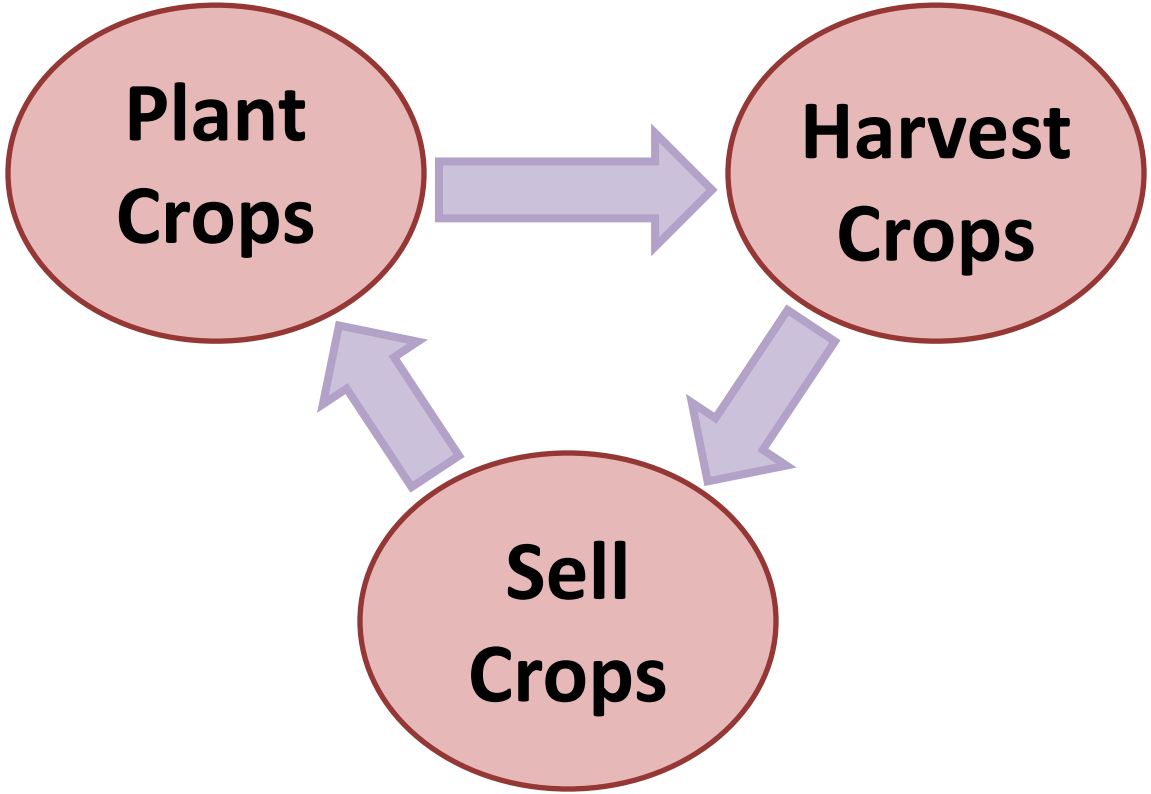
In Common

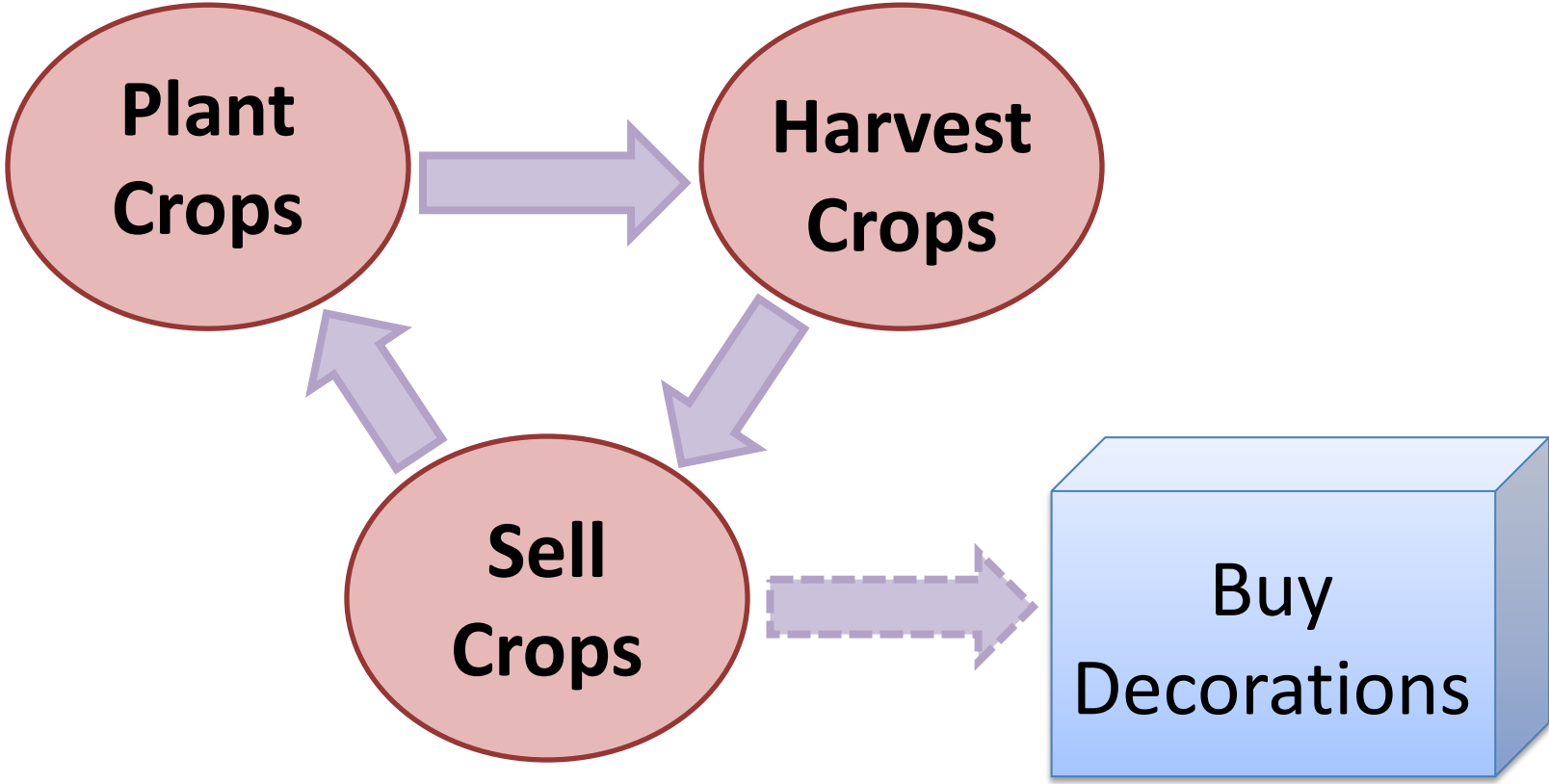
- Deep loops

Farmville, 2009


Plant
Crops


Plant Crops
Harvest Crops


Plant Crops
Harvest Crops
Sell Crops


Plant Crops
Harvest Crops
Sell Crops
Buy Decorations

Hay Day, 2013

How about selling me this?

2 → 44

(You have: 6)

Yes, here you go

No, sorry

Wait a moment

Orders
2 616
30
Susan's Store
125
36
Ben's Brewery
133
99
Kindergarten
52
80
Susan's Store
79
208
Joan's Salon
95
186
Mike's Mill
128
57
Susan's Store
27
110
Mike's Mill
128
57
2/2
2/2

23
John
Steven's Roadside Shop
22
Cyrus
10x
28
10x
40
Create New Sale
Create New Sale
Create New Sale
Create New Sale
Create New Sale
Create New Sale
Create New Sale
Create New Sale
Create New Sale

Feed Mill
37 sec
Empty
Empty
1
6

Dairy
Empty
Empty
6

Load Cargo

Boat leaves in:

16 h 5 min

5/3

171

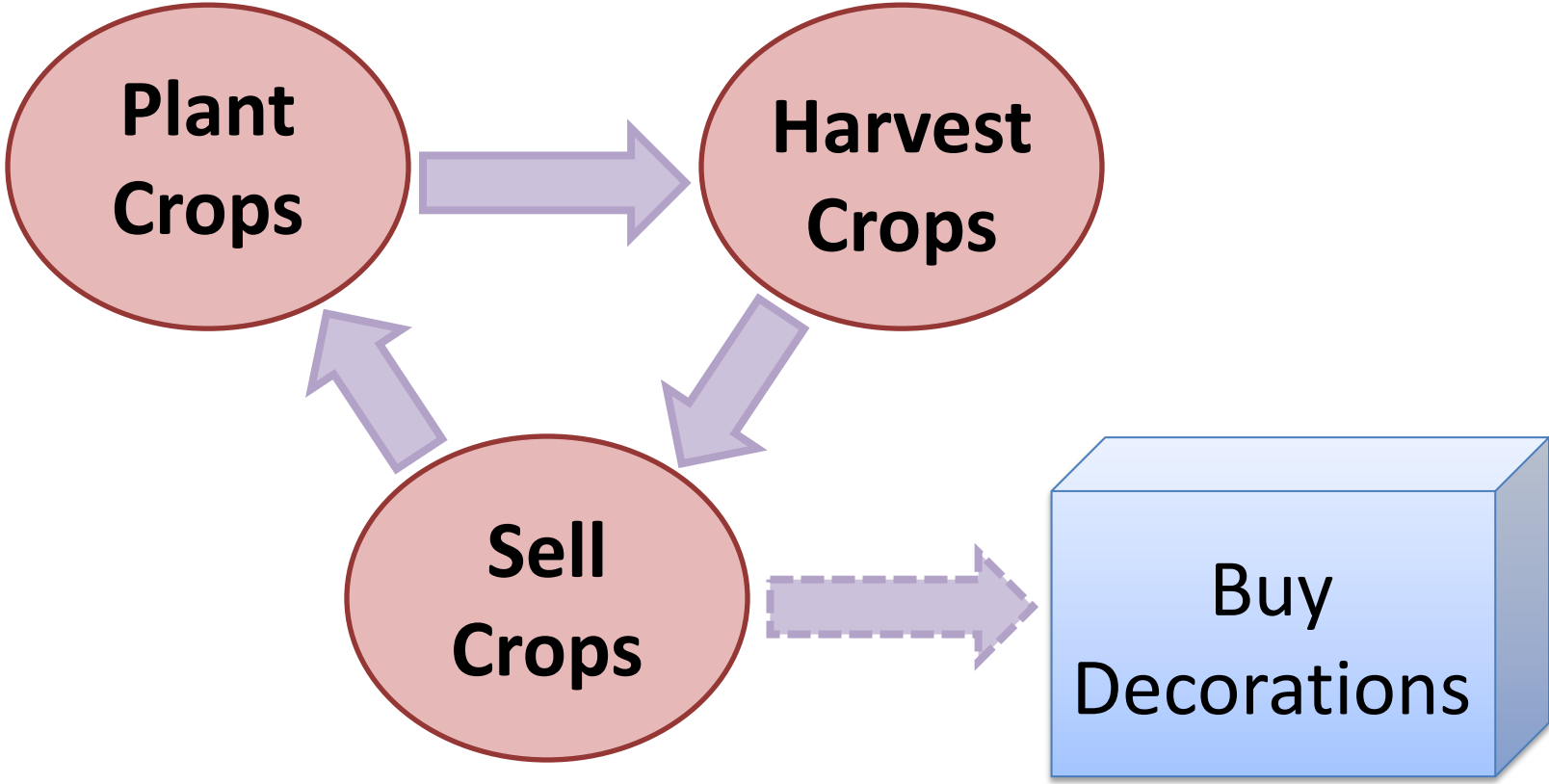
165

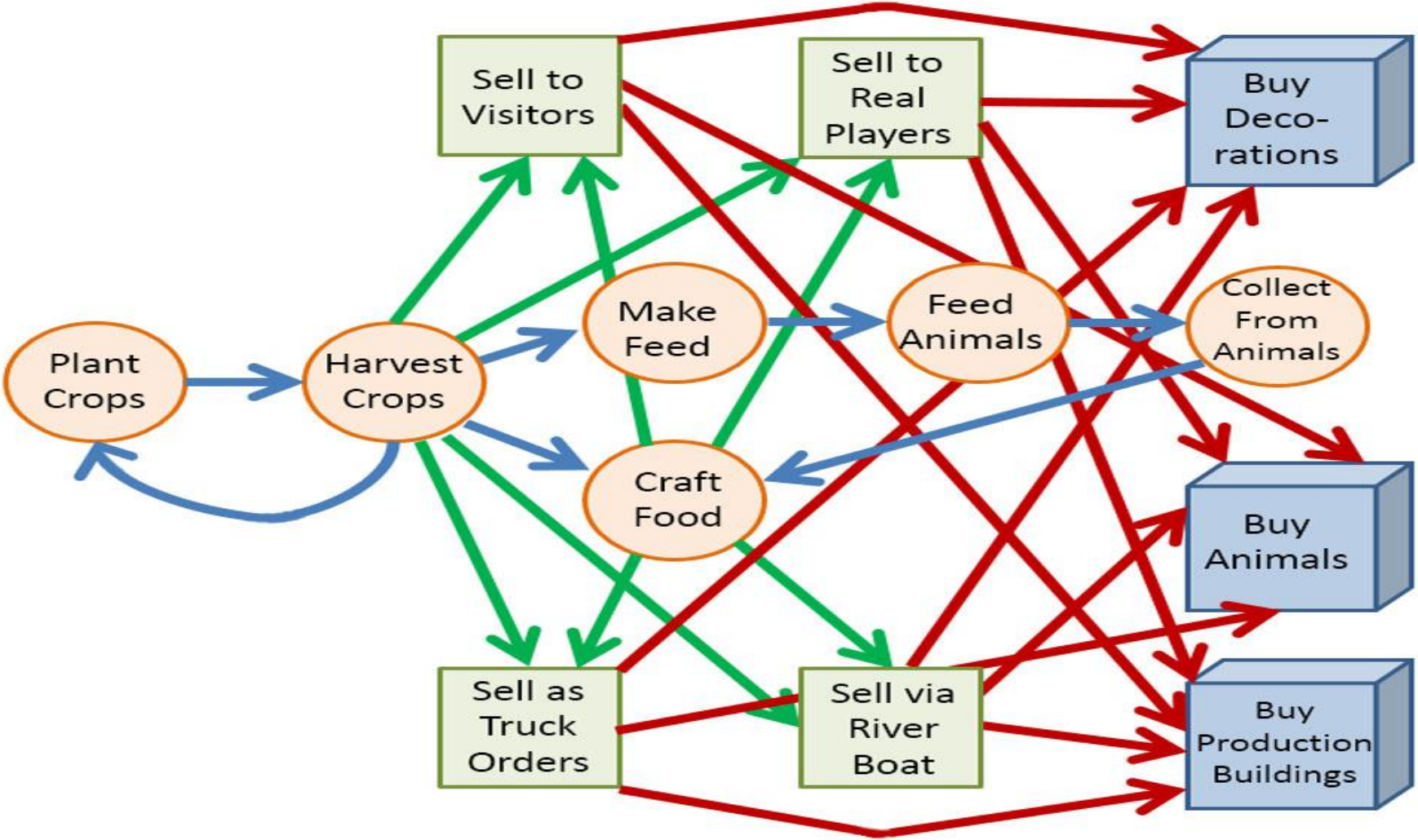
Ask for Help

Complete shipment:

419 1

16


Plant Crops
Harvest Crops
Sell Crops
Buy Decorations


Sell to Visitors
Sell to Real Players
Buy Deco-rations
Plant Crops
Harvest Crops
Make Feed
Feed Animals
Collect From Animals
Craft Food
Buy Animals
Sell as Truck Orders
Sell via River Boat
Buy Production Buildings

In Common

- Deep loops
- High production values

2432
9
6
8
Get Starter Pack!
2
26
3
I'm Playing!
Add Friend
19
11
12
13
13
14
16
17
40

In Common

- Deep loops
- High production values
- Polish

Not In Common

Not In Common

- Brief FUE

Seeds need time to grow. When harvested, each Field produces two crops.

Not In Common

- Brief FUE
- Missions

GOALS
Battle with your dragons
Train them! You won't lose them!
Rewards: XP 50 700
GO
0/2
Clear two bushes
By clearing obstacles you'll gain xp and space
Rewards: XP 50 15
GO
NEW
Collect from two habitats
Get gold from habitats
Rewards: XP 100
GO
DAILY BONUS
Japanese Island
3d 15:45:18s
MENU
SHOP

278985
3
20
5
Special Deal!
Fruits of Labor
Fruits of Labor
A couple things a successful farm can always use are more trees and more farm plots. Take some time to do a little organizing.
Room for Improvement 1/3
2/4
Harvest 4 Orange Trees for your orchard.
Go to Farm!
Skip 4
2/8
Harvest 8 Apple Trees.
Go to Farm!
Skip 5
35/35
Have 35 plots.

Homer
Shop at Kwik-E-Mart
Time: 60m
Reward 70 XP 17
Start
Clean Up Springfield
Time: 6s
Reward 35 XP 1
Start
Play with his myPad
Time: 45s
Reward 3 XP 1
Start
Break into the Brown House and Watch TV
KWIK-E-MART

13
588/4790
2 590
30
4

Not In Common

- Brief FUE
- Missions
- Visible Grid

278985
3
20
5945
5
15
Special Deal!

04:35:31
CANCEL
OK

Not In Common

- Brief FUE
- Missions
- Visible Grid
- Nurturing

6
5,580
30
26,356
185
GOALS
DAILY BONUS
Roger
Cloud Dragon
REVENUES
HABITAT
11/MIN
Level
3
Boost Pack
8:20:18s
RANK
FEED
20
MOVE
COLLECT

BREEDING
Wallace
Bonzo
Waiting 3h 59m 53s
Speed up for 4

Not In Common

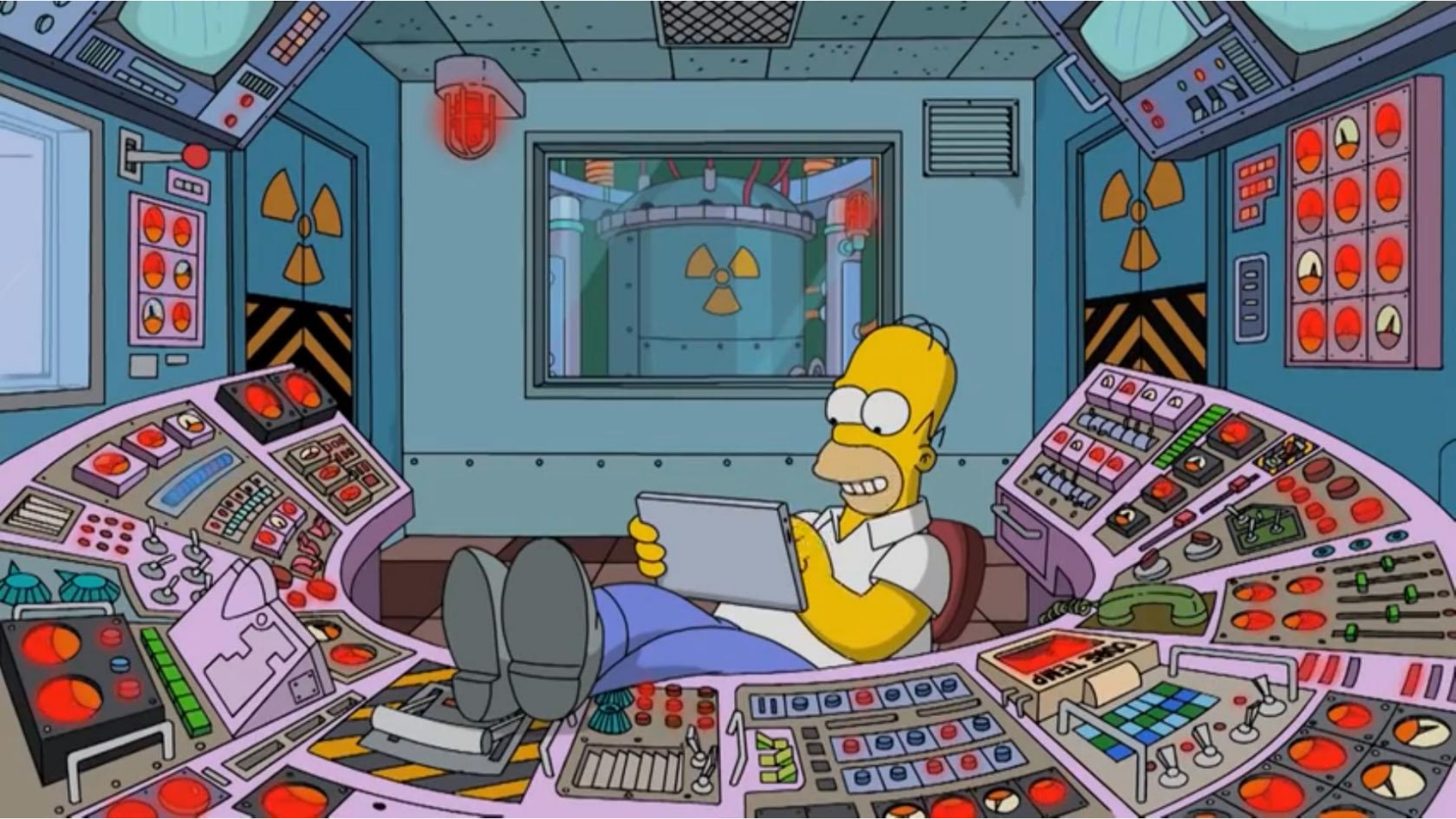
- Brief FUE
- Missions
- Visible Grid
- Nurturing
- PvP

4
Bonzo
Terra Dragon
915/915
YOUR TURN
Horacio
Nature Dragon
4
915/915
Bonzo does a Earthquake attack

Not In Common

- Brief FUE
- Missions
- Visible Grid
- Nurturing
- PvP
- Humor

THE SIMPSONS
TAPPED OUT
MOE'S
MATT GROENING


CORE TEMP

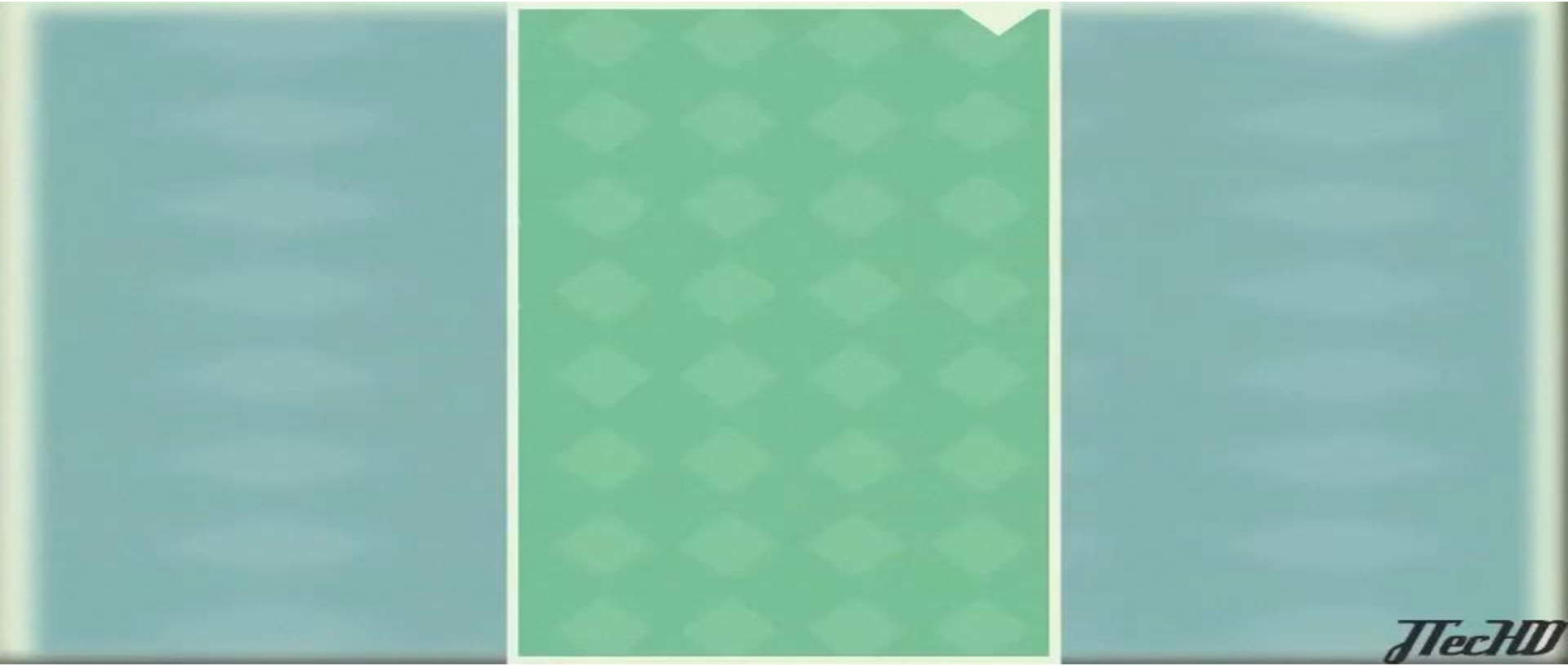
March is here! And you know what that means: time to make my New Years Resolution!
KWIK-E-MART
Jackpot
Duff
ONLY

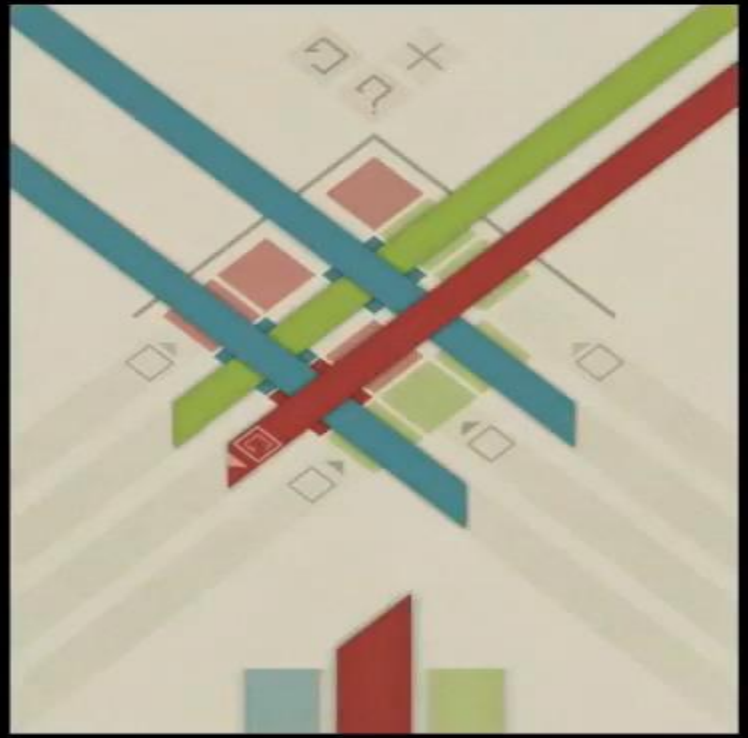
Lessons

- Ideal feature sets still being explored
- Don’t venture here, unless…

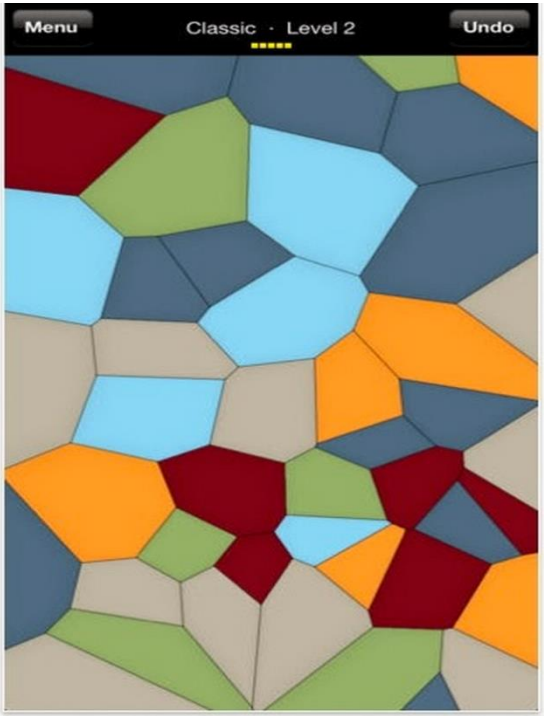
Part Two

A PUZZLING DEVELOPMENT

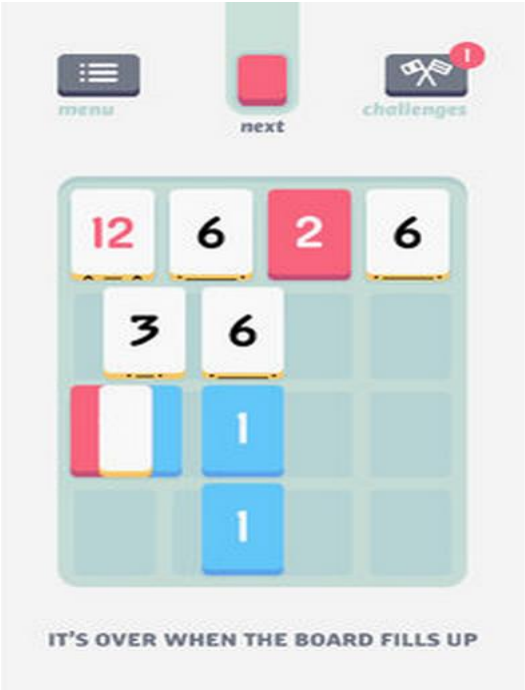

JTecHD



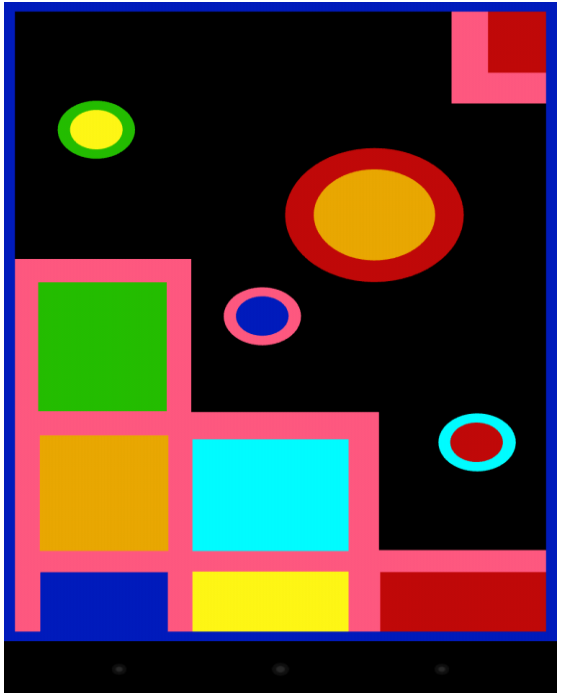
APP SPY
.com



VORO



THREES



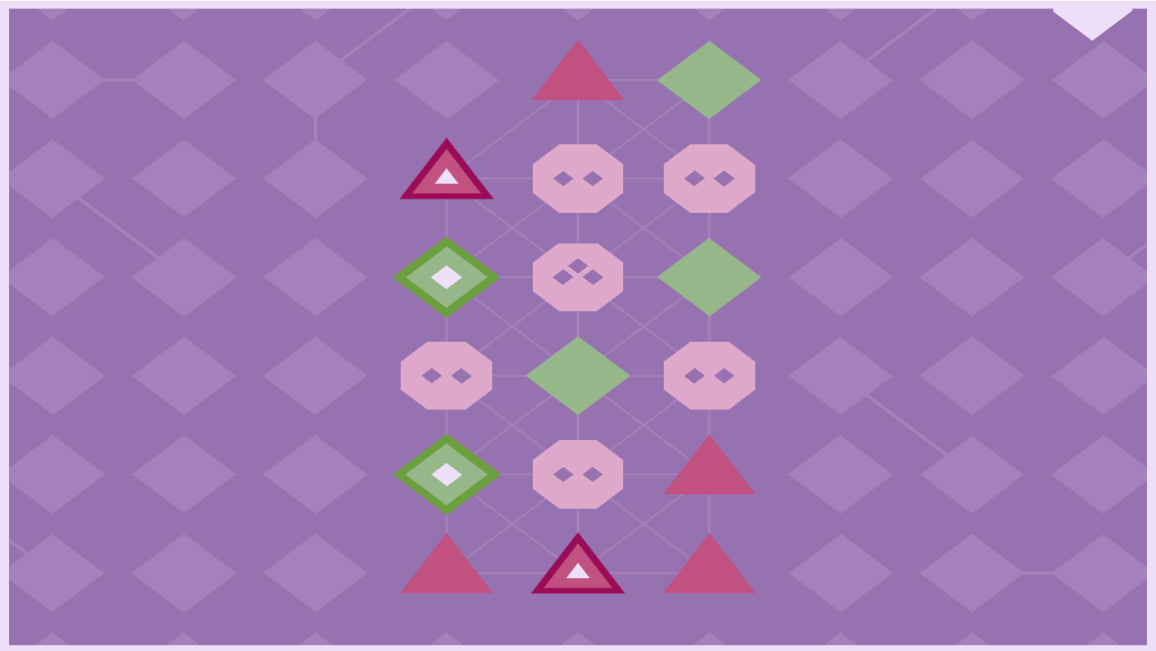
COLOR ZEN

PET RESCUE SAGA

FARM HEROES SAGA

JELLY SPLASH

JUICE CUBES



Level 24
ArcadeGo.com

HELP ME FLY

(108) Farm Heroes Sa
apps.facebook.com/farmheroes/?ref=main
Full
3,075
20
68%
2/4
20/20
5/20
MOVES LEFT:
18

Little achievements = little shots of dopamine

Conclusion

- Mechanics trump theme.
- Mass market theme may help.
- Let your player achieve victory in different ways.
- Dopamine: Show progress visually at all times.

Part Three

CLASH OF CLONES

Shocking Conclusion

- Success Inspires Imitation

Free-To-Play

Dire

Maybe Not So Shocking

2011

Trend #3

EVERYTHING MUST BE
FRONTIER

Playdom

2010

Trend #7

Everything Has To
Be A Farm

Playdom

Yup, that's me.

448 BC

Trend #IV

Everything Has To Be A Doric Column

Playdom

1,700,000 BC

Trend #Smash!

Everything Has To Be A Rock

Playdom

Succeeding Again?

- 2008-2009: Mob Wars Reskins
- 2009-2010: Farmville Reskins

Game	iPhone	Fac	Google Play
Clash of Clans	1	2	1
Castle Clash	43	80	8
Royal Revolt 2	85	N/A	N/A
Jungle Heat	N/A	N/A	45
Greed for Glory	N/A	N/A	76
Samurai Siege	N/A	N/A	100

List from www.copycoc.com

Amazing Clan War
Apoc Wars
Battlefront Heroes
Boom Beach
Call to Arms
Castle Clash
Clash of Clans
Cloud Raiders
Dojo Mojo
Jungle Heat
Kingdom Clash
League of Shadows
League of Warriors
Rising Clans
Royal Revolt 2
Samurai Siege
Super World War
Total Conquest
X Tank

Abject Imitation

With thanks to “Innovation on the App Store” on imgur.com

Further Afield

IOS | GOOGLE PLAY | AMAZON | BETA WINDOWS PHONE | MAC | BETA WINDOWS

iOS Top Charts

Devices: iPhone | Country: Canada | Category: Overall | In App Purchase: All Apps | Date: Mar 10, 2014

Canada - Overall - Mar 10, 2014 6:00pm UTC-4 (Mar 10, 2014 3:00pm UTC-7)

Highlight Free Paid

#	Free	Paid	Grossing
1	Smash Hit Mediocre AB	Bridge Constructor Headup Games GmbH & Co KG	Clash of Clans Supercell
2	Flappy Fall Balloon Island	Papa's Freezeria To Go! Flipline Studios	Candy Crush Saga King.com Limited
3	Flappy Rainbow Ostap Ostaschenko	Minecraft – Pocket Edition Mojang	Game of War - Fire Age Machine Zone, Inc
4	Emojizer Emoji Words and Na... Alejandro Portela	Devious Dungeon Ravenous Games Inc.	Hay Day Supercell
5	Relaxia: Sleep aid and Relax... (new) Omar Bellamine	Heads Up! Warner Bros.	The Hobbit: Kingdoms of Mid... ▲2 Kabam
6	Flappy Wings - FREE Green Chili Games UG (haftun...	Afterlight Simon Filip	Boom Beach Supercell

Canadian For a Day

More of the Same?

But..

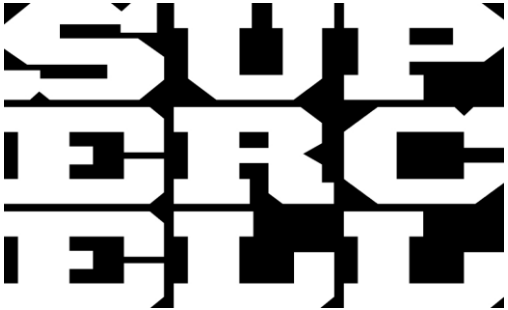
8
DJEmerson13
50
433
552
36

18 Arc of Fire
Battle ends in:
3m 55s
Retreat
38
x2
x1
7
6
2
3

Who Dares Challenge the Formula?

SUP
ERC
ELL

VS



Takeaways

- Massive revenue potential
- Imitation detected
  - and rejected
- Significant iteration successful
- Still wide open

Part Four

A SURE BET

Slots Only

#5 on Facebook
#10 on iPhone
#11 on iPad
#9 on Android

#22 on iPhone
#23 on iPad

#17 on Facebook
#23 on iPhone
#14 on iPad
#12 on Android

Bingo Only

#14 on Facebook
#17 on iPad
#16 on Android

#10 on iPad
#24 on Android

Poker Only

#6 on Facebook
#20 on iPhone

Multiple Genres

#3 on Facebook
#12 on iPhone
#4 on iPad
#18 on Android

#4 on iPhone
#5 on iPad
#22 on Android

#18 on Facebook
#19 on iPhone
#9 on iPad

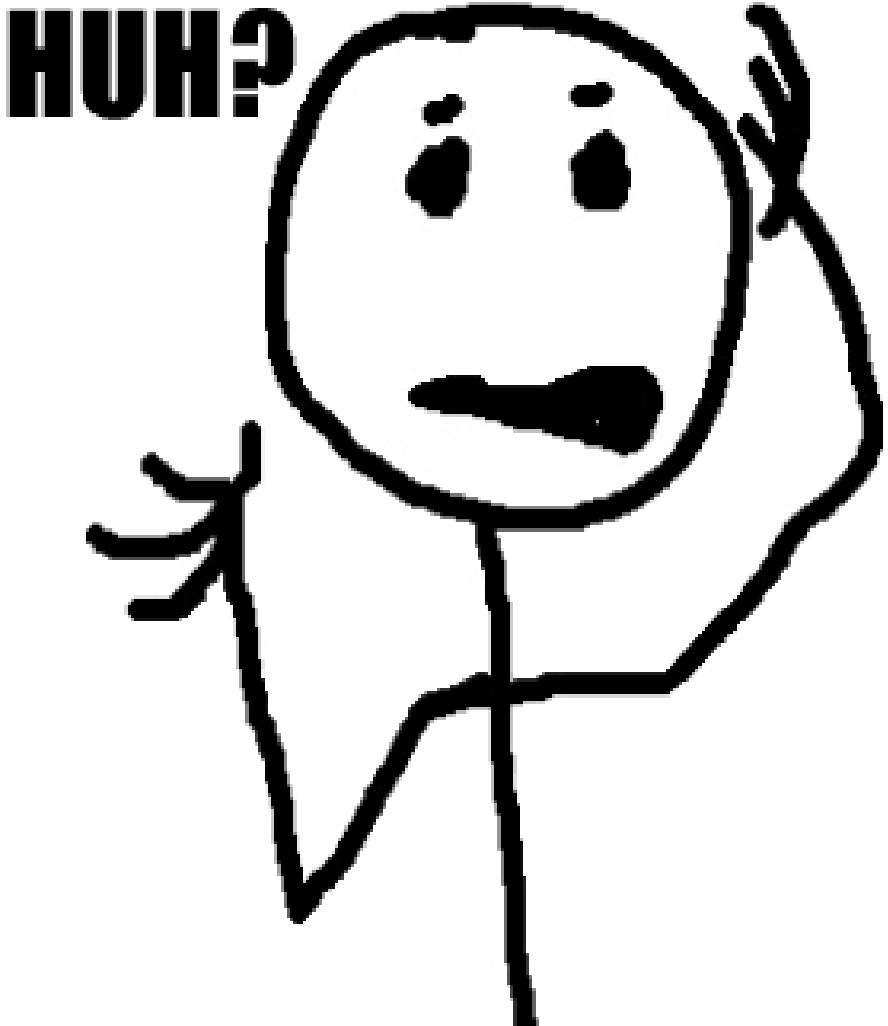
Plus 7 more*

*in the Top-25 Grossing charts on one of those four platforms

Top Two Takeaways

1. Social casino games are becoming *more and more* like real-world casino games; and

2. Social casino games are becoming *less and less* like real-world casino games.


HUH?

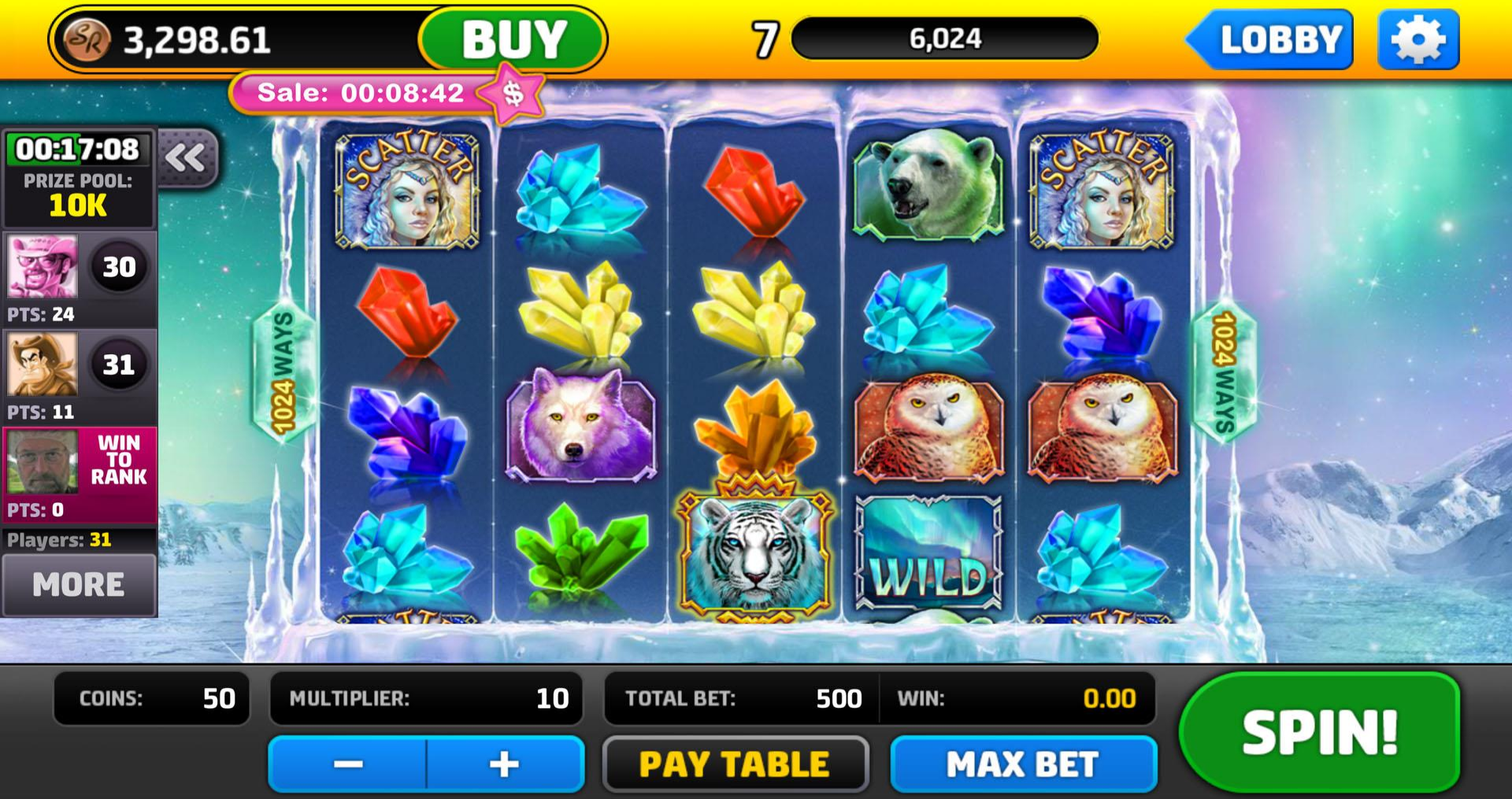
IP is Becoming More Prevalent

Growing Sophistication

Growing Sophistication

- Diversity of slot machine types

149.61
BUY
7
9,493
LOBBY
Tournament on this game is coming soon
LIVE Tournamania
20 LINES
20 LINES
LINES: 14
BET: 10
TOTAL BET: 140
WIN: 0.00
PAY TABLE
MAX LINES
SPIN!


3,298.61
BUY
7
6,024
LOBBY
Sale: 00:08:42
00:17:08
PRIZE POOL:
10K
30
PTS: 24
31
PTS: 11
WIN TO RANK
PTS: 0
Players: 31
MORE
1024 WAYS
SCATTER
SCATTER
WILD
1024 WAYS
COINS: 50
MULTIPLIER: 10
TOTAL BET: 500
WIN: 0.00
−
+
PAY TABLE
MAX BET
SPIN!

Growing Sophistication

- Diversity of slot machine types
- Reel choreography

Growing Sophistication

- Diversity of slot machine types
- Reel choreography
- Use of audio

MORE GAMES
HIGH ROLLER
PEWTER
3
46,945
NEW OFFERS!
243 WAYS
BONUS
243 WAYS
PAY TABLE
Total bet = 1200 x 1
WIN
TOTAL BET
1200
AUTO SPIN
SPIN
MAX BET
0

MORE GAMES
HIGH ROLLER
PEWTER
4
48,445
NEW OFFERS!
243 WAYS
BONUS
BONUS
243 WAYS
PAY TABLE
Good Luck!
WIN
TOTAL BET
1200
AUTO SPIN
STOP
MAX BET
0

Growing Sophistication

- Diversity of slot machine types
- Reel choreography
- Use of audio
- Exploiting known fallacies

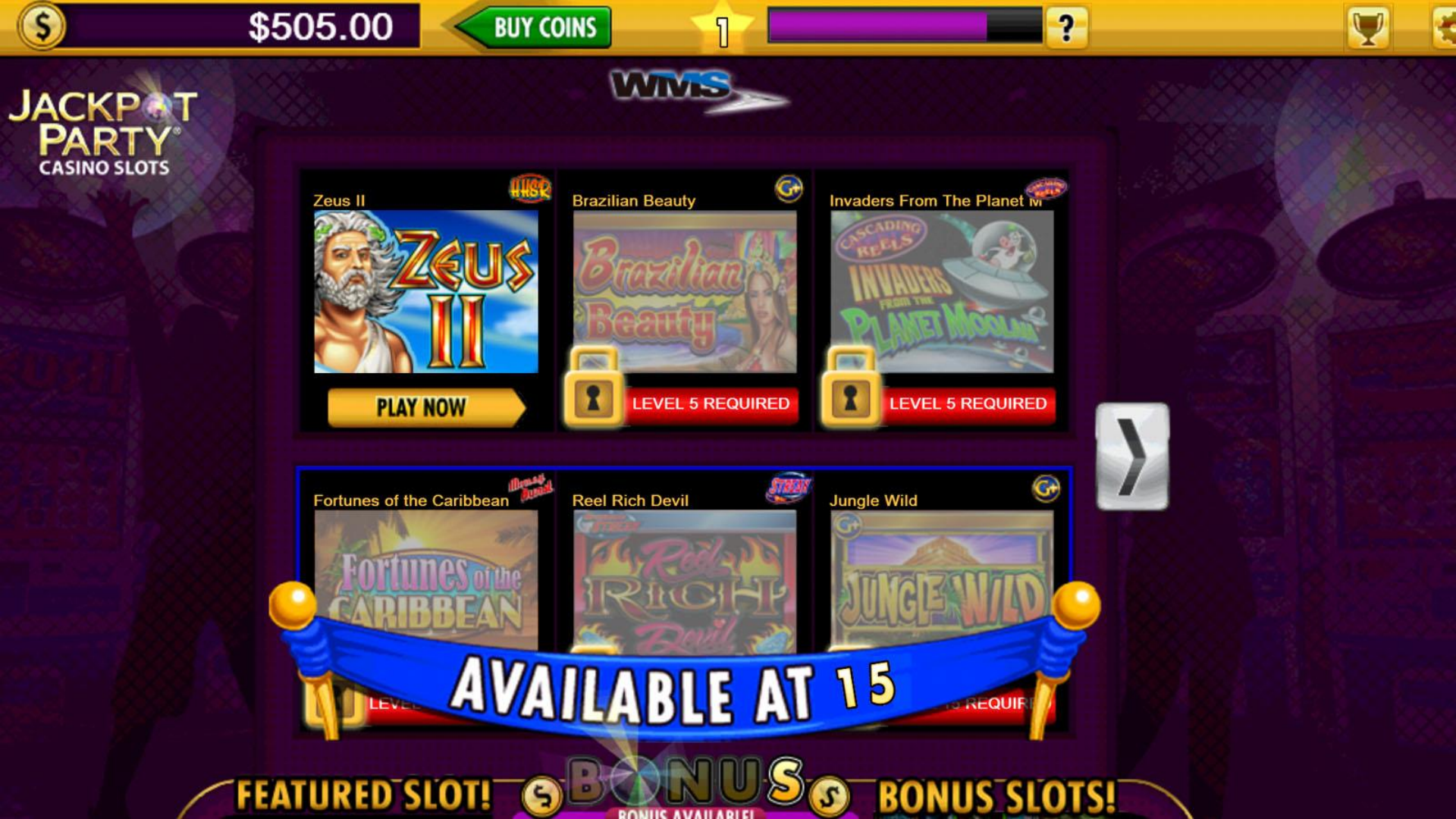
MORE GAMES
HIGH ROLLER
PEWTER
3
45,745
BUY COINS
243 WAYS
BONUS
243 WAYS
PAY TABLE
Total bet = 1200 x 1
WIN
TOTAL BET
1200
AUTO SPIN
SPIN
MAX BET
0

More Like Social Games

More Like Social Games

- Unlocking

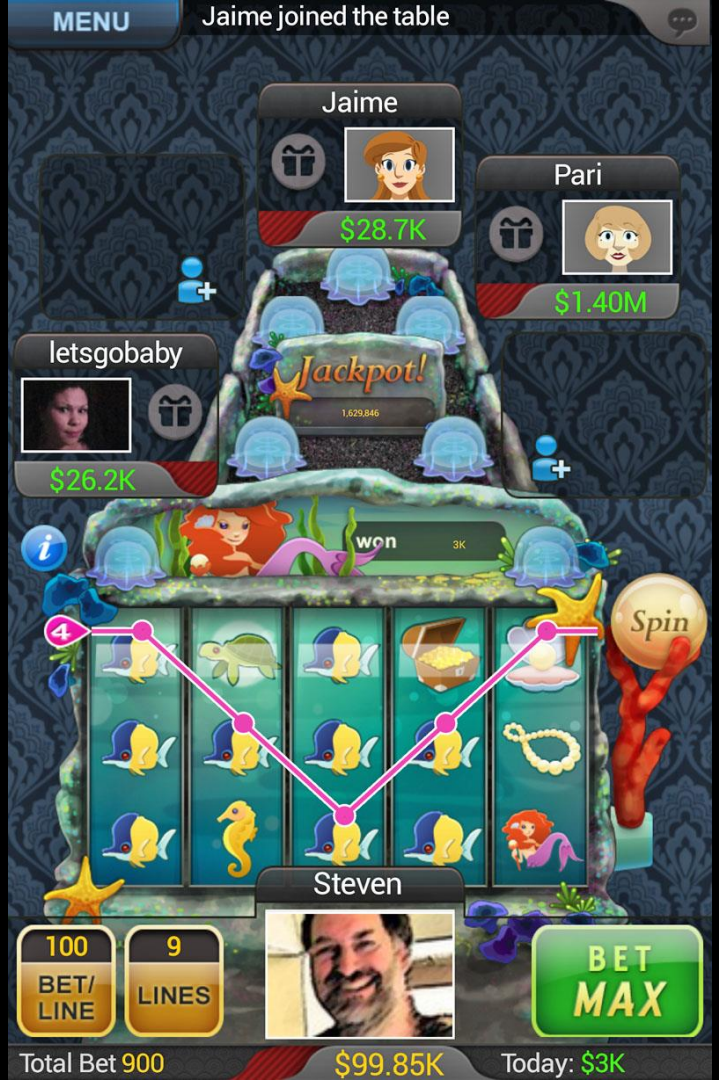
1,268.25
BUY
7
6,024
FARM FORTUNE
QUEEN OF THE DESERT
Civilitreasures
FOREST OF MAGIC
ENCHANTED OZ
CREEPY FORTUNES
Cat Chef
ELVIS
LIVE Tournamania
GIFTS
BONUS
COLLECT

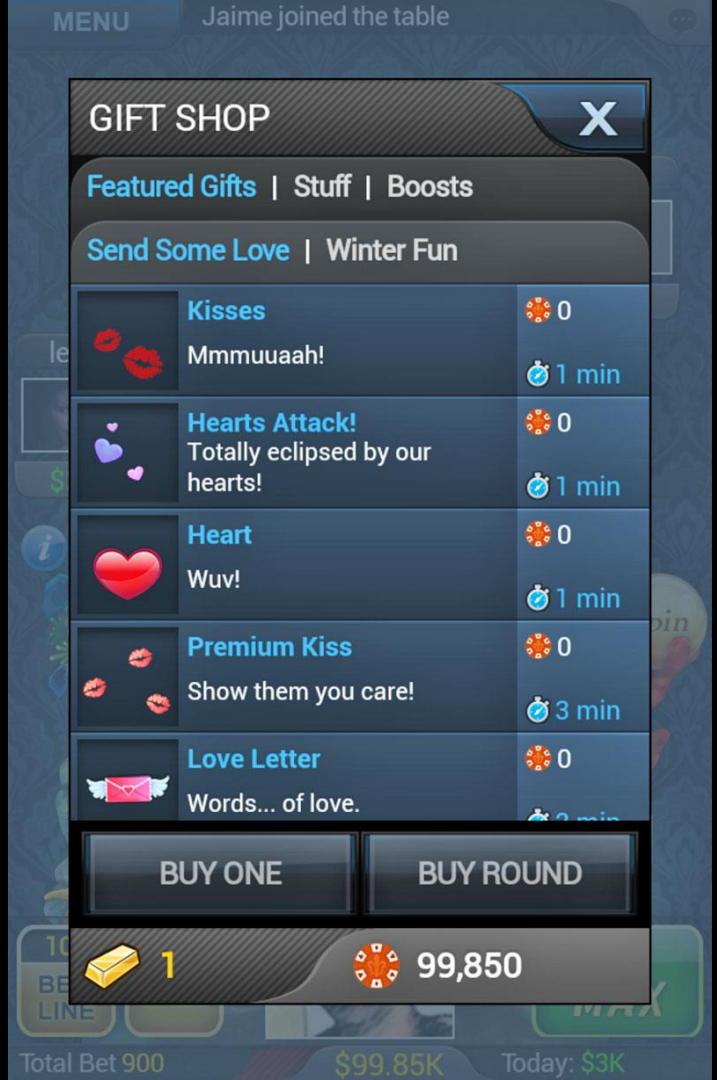

$505.00
BUY COINS
1
JACKPOT PARTY
CASINO SLOTS
WMS
Zeus II
PLAY NOW
Brazilian Beauty
LEVEL 5 REQUIRED
Invaders From The Planet M
LEVEL 5 REQUIRED
Fortunes of the Caribbean
Reel Rich Devil
Jungle Wild
AVAILABLE AT 15
FEATURED SLOT!
BONUS
BONUS SLOTS!

Buck's Ahoy
Buck's Ahoy
Buck's Ahoy
Buck's Ahoy
Frog Prince
DENVER DUCK
DENVER DUCK
HEXBREAKER
CHANGE YOUR LUCK
DENVER

More Like Social Games

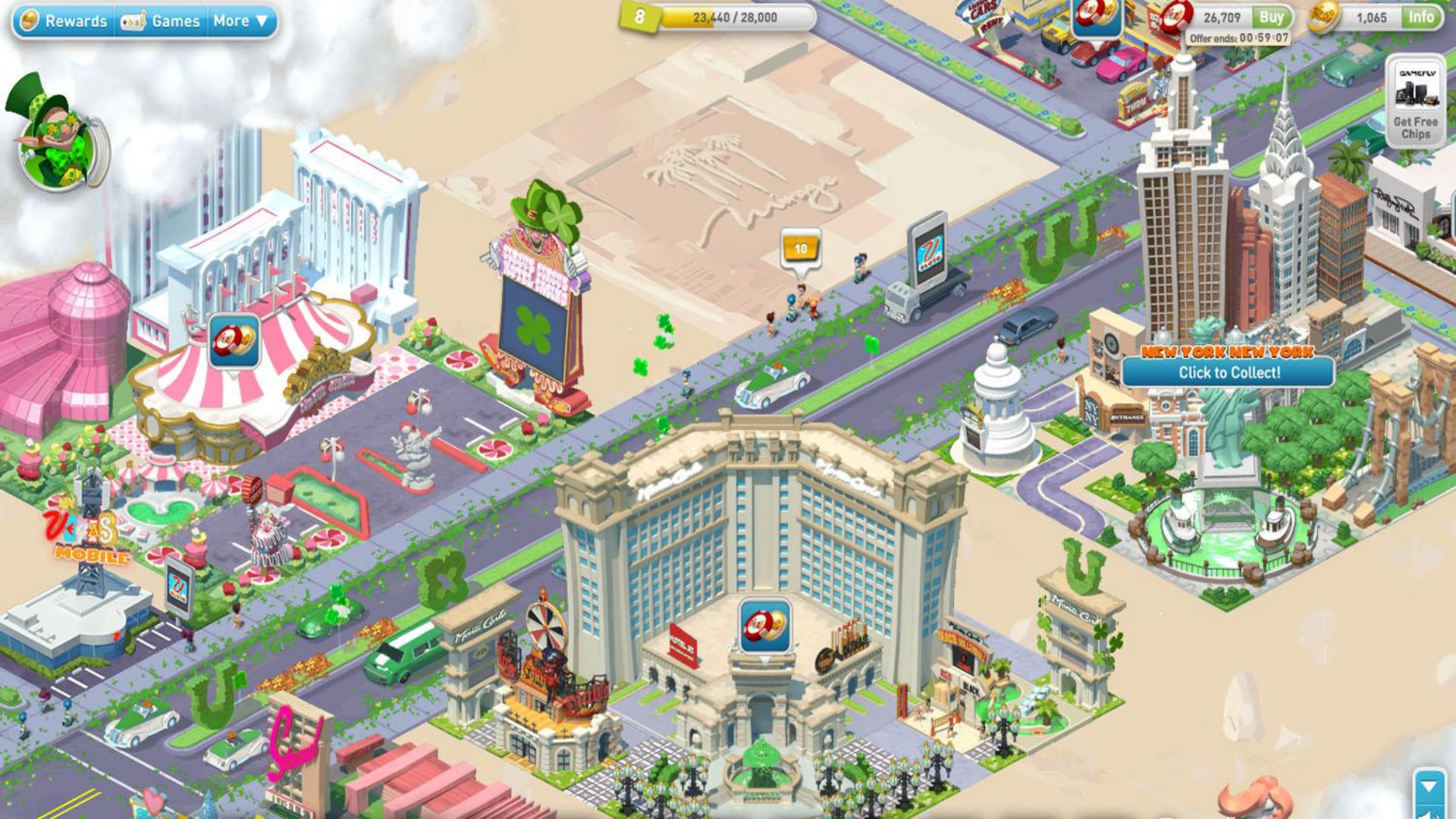
- Unlocking
- Social with strangers


MENU
Jaime joined the table
Jaime
$28.7K
Pari
$1.40M
letsgobaby
$26.2K
Jackpot!
1,629,846
won
3K
Spin
Steven
100
BET/ LINE
9
LINES
BET MAX
Total Bet 900
$99.85K
Today: $3K


MENU
Jaime joined the table
GIFT SHOP
X
Featured Gifts | Stuff | Boosts
Send Some Love | Winter Fun
Kisses
Mmmuuaah!
0
1 min
Hearts Attack!
Totally eclipsed by our hearts!
0
1 min
Heart
Wuv!
0
1 min
Premium Kiss
Show them you care!
0
3 min
Love Letter
Words... of love.
0
BUY ONE
BUY ROUND
1
99,850
Total Bet 900
$99.85K
Today: $3K

More Like Social Games

- Unlocking
- Social with strangers
- Building


Rewards
Games
More
8
23,440 / 28,000
26,709
Buy
Offer ends: 00:59:07
1,065
Info
Get Free Chips
10
NEW YORK NEW YORK
Click to Collect!
VEGAS MOBILE

More Like Social Games

- Unlocking
- Social with strangers
- Building
- Time-limited content

CLOSE
20 Days Left!
1,000,000
TOKENS

Lessons

- Social casino is a blend of social and casino
- It’s important to know when to draw upon the real world, and when to draw upon F2P gaming techniques

Part Five

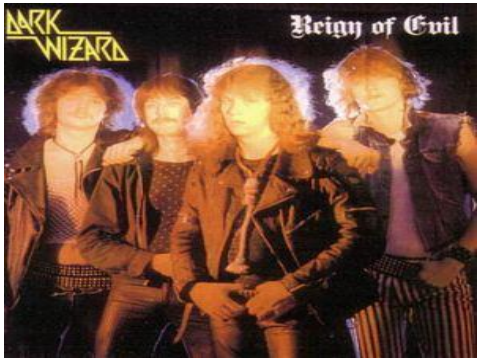
SHUFFLE UP AND DEAL

What Is a CCG?

Collectible Card Game

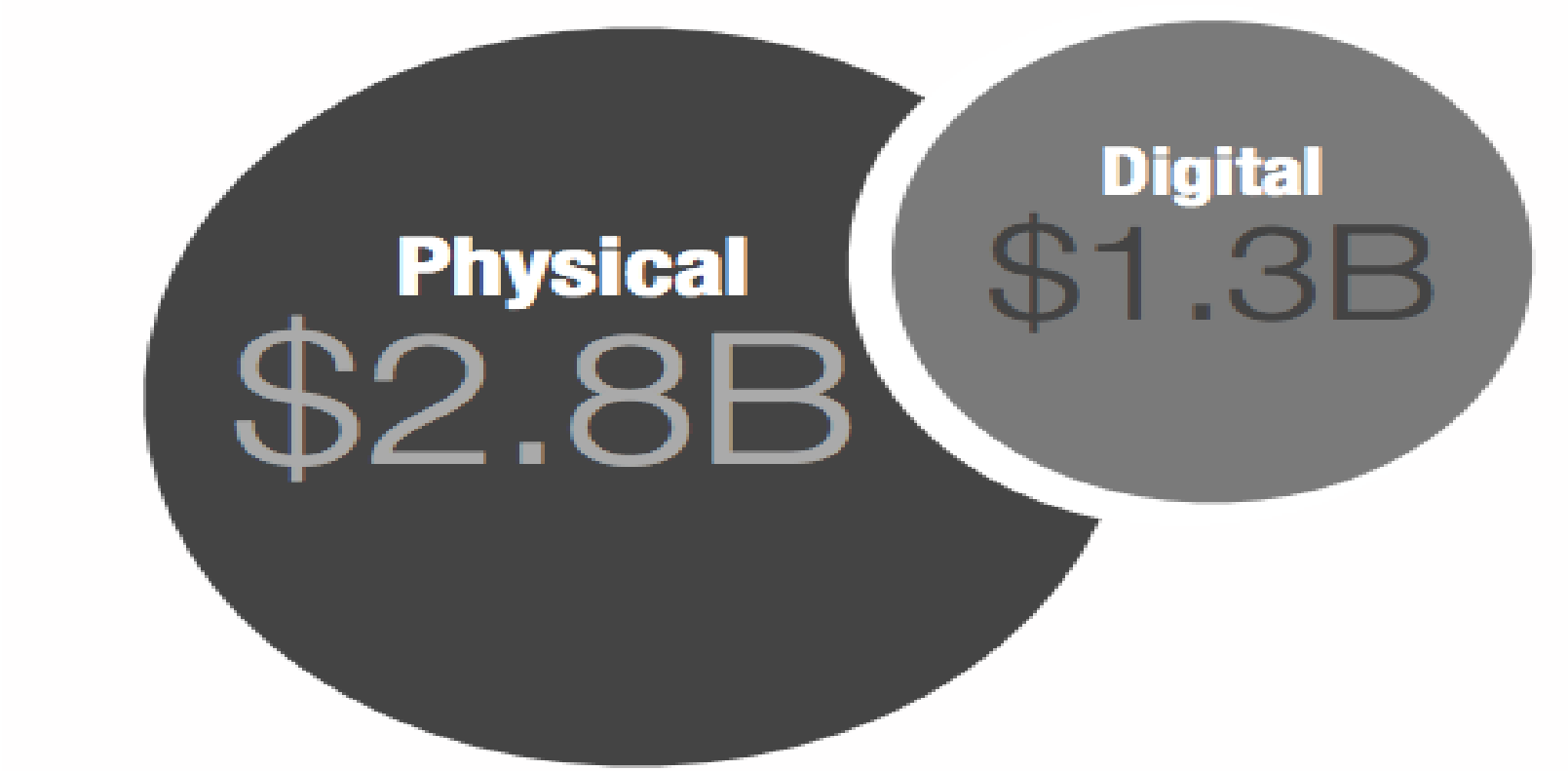
Where Do CCGs Come From?

1993



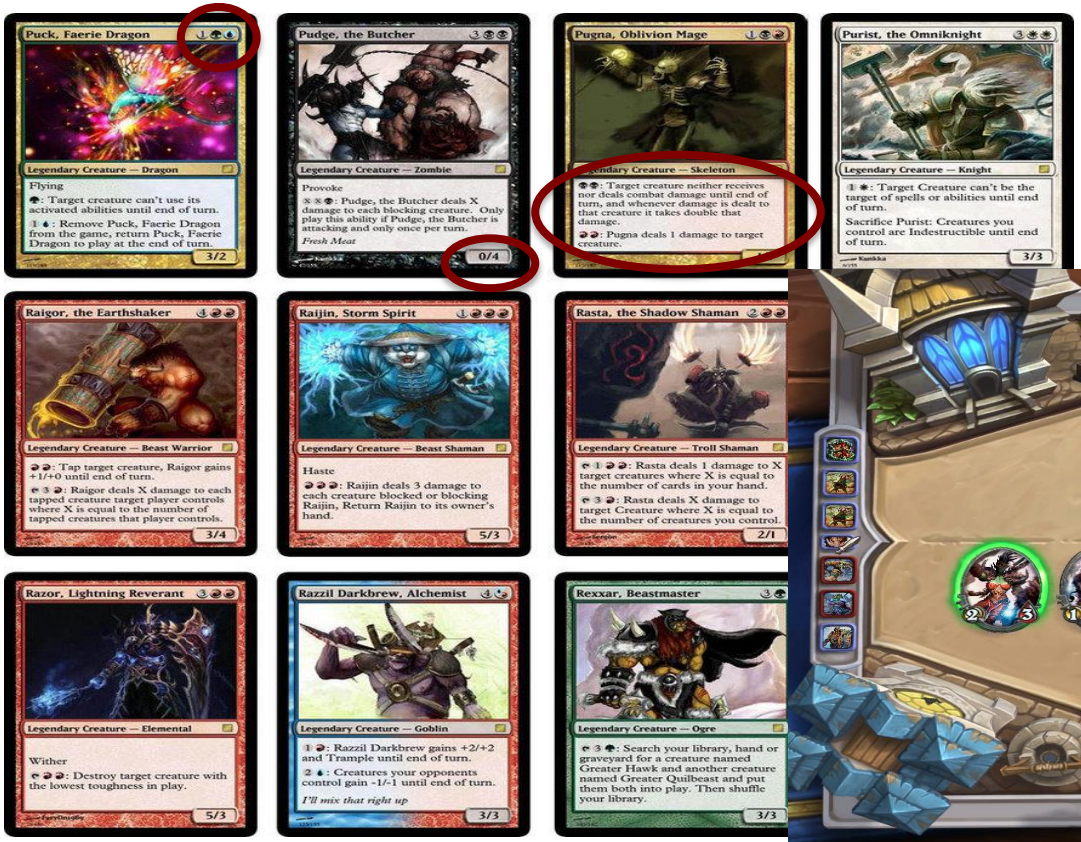
Where Do CCGs Come From?

Serious Business



“Digital Collectible Card Games 2014”, Superdata Research

Desktop CCGs



Desktop CCGs

- 30-60 card decks
- Heavy interactions between cards
- Complicated game states
- 15-30 minute game time

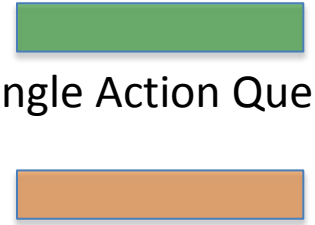
Web-Based CCGs

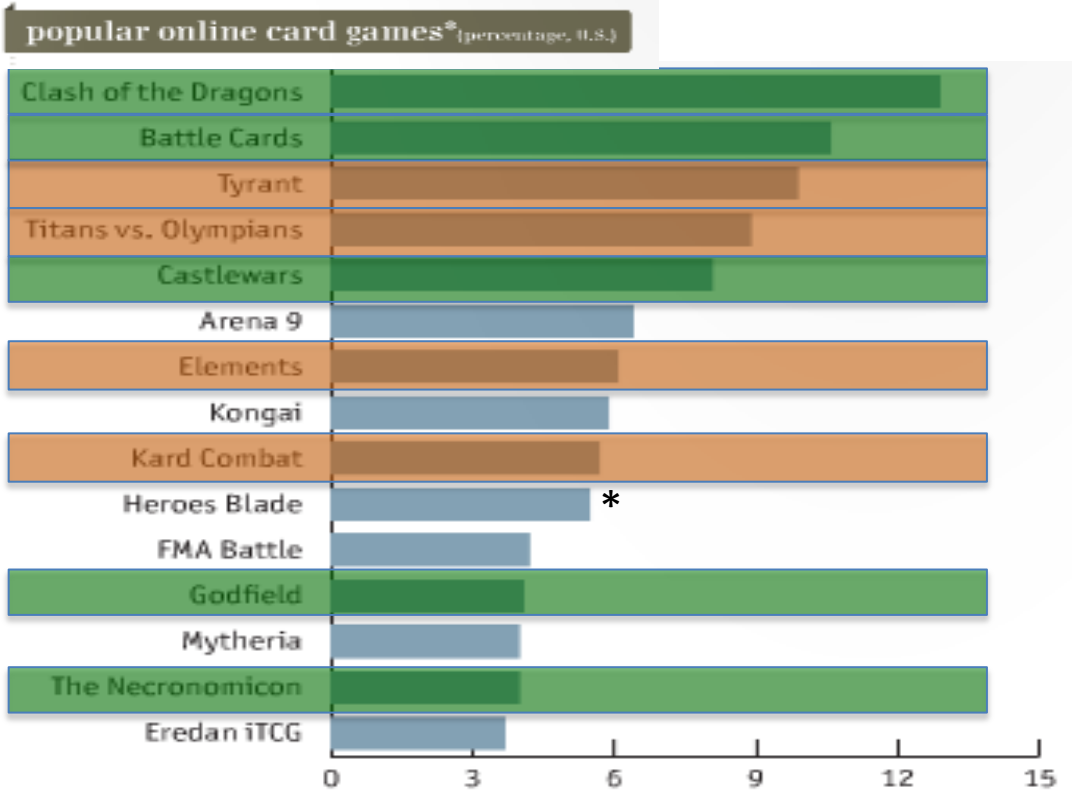
Lane-Based CCGs

Web-Based CCGs

Single Action Queue CCGs

Web Design Patterns





List from “Digital Collectible Card Games 2013, Casual Game Sector Report”, Superdata Research

Web-Based CCGs

- 10-20 card decks
- A few interactions between cards
- Simple game states
- 3-10 minute game time

Mobile CCG

Back
Home
Next
Start Battle
Enter
menu
My Page
Quest
Battle
Enhance
Evolve

Back
Home
Next
Lanceth, Bandit Lord
YOU WIN!
Enter
Ilanya56
HEAL!
Holy Powder 3
menu
My Page
Quest
Battle
Enhance
Evolve

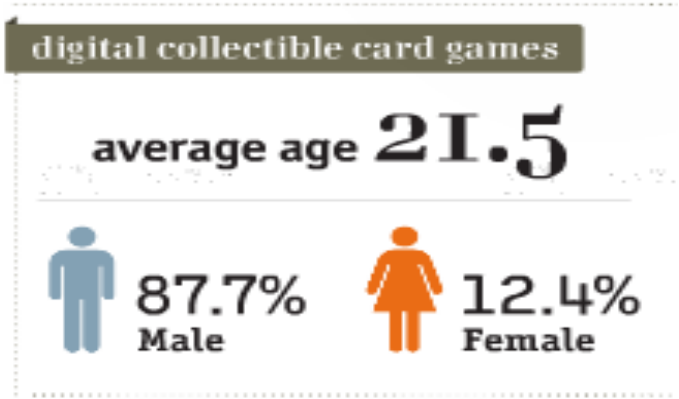
Mobile CCGs

- 5 card decks
- Little or no interaction between cards
- 5 second game time
- Heavy emphasis on upgrading cards between games

Design for Your Platform

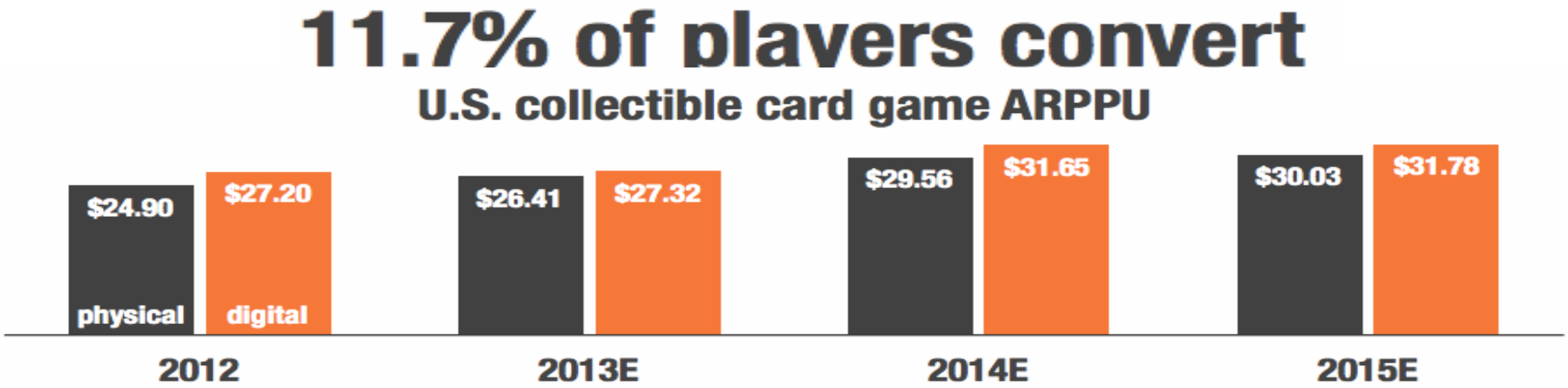
- Desktop CCGs in Mobile Top 100 Grossing : 0
- Web CCGs in Mobile Top 100 Grossing : 1
  - Google Play: Tyrant Unleashed
- Mobile CCGs in Mobile Top 100 Grossing: 21
  - 5 on iOS
  - 16 on Google Play

Similarities



Data from “Digital Collectible Card Games 2013” by Superdata Research

Similarities



Data from “Digital Collectible Card Games 2014” and “Digital Collectible Card Games 2013” by Superdata Research

Takeaways

- Big money, some whammies
- Metagame matters
- Target the right audience
- Target the right platform

Part Six

ARGHHH!!! COLLECTIBLES ARE CRAWLING UP MY LEG!!!

KNOCKDOWN BLOW!

SHOP

BOOSTER PACKS | CHARACTERS | SUPPORT CARDS

Black Adam	The Joker Insurgency	Batman	Wonder Woman Regime	Superman
500 / 400 / 51,000	750 / 850 / 148,000	700 / 1,100 / 182,000	750 / 1,050 / 182,000	800 / 1,200 / 220,000
Black Adam Regime	Bane	Batman Insurgency	Doomsday	Superman Regime
750 / 750 / 133,000	650 / 1,000 / 157,000	750 / 1,050 / 182,000	850 / 1,050 / 201,000	900 / 1,100 / 220,000

Back

280

« PRE
HOME
MY PAGE
CARD PACK
Find an Alliance to join!
Lv: 2
Energy: 14
Attack Power: 10/10
Defense Power: 10/10
Card 17/60
Rally Points 2000
Silver 41030
Force members 0/5
LEADER CARD
Spider-Man+
MENU
BATTLE
MISSION
BOOST
FUSION

Gods [Life Traveler] Ancient Elf (SS Rare)
Lvl: 1 Maturation: 0%

ERNIE BANKS shortstop CHICAGO CUBS
TED WILLIAMS outfield BOSTON RED SOX
HENRY AARON outfield MILWAUKEE BRAVES
KALINE
DETROIT TIGERS
YOGI BERRA
MICKEY MANTLE
NEW YORK YANKEES
WARREN SPAHN pitcher MILWAUKEE BRAVES
JACKIE ROBINSON
WILLIE MAYS
"SANDY" KOUFAX pitcher BROOKLYN DODGERS

Pokémon
Gotta Catch em All!

«BACK
HOME
MY PAGE
CARD PACK
I can wrap myself in the energies of hyperspace. Walk on them, break you with them, stop your bullets, put you in a cage. Are you sure you want to take me on?
102.456
Lv: 60/60 PWR REQ: 25 Mastery: 40/40
ATK: 6062 DEF: 6249
Gender: Female Faction: Super Hero
Card XP: MAX 100%
Ability: Channeling Hyperspace
Ability Lv: 1 Usage: Average
Effect: Remarkably raise ATK/DEF of team.
This Card may not be traded nor gifted to another player.
Card Count: 1
Sale Price: 92,000
MENU
BATTLE
MISSION
BOOST
FUSION

-84 AT&T LTE 12:29 PM 93%
Lv: 60/60 PWR REQ: 29
ATK: 6440 DEF: 8614
Mastery: 40/40
Card XP: MAX 100%
Ability: Super Soldier
Ability Lv: 1 Usage: High
Effect: Significantly intensify defense on your Tactics Cards.
TACTICS (SS Rare)
[American Pride] Captain America
Lv: 60/60 PWR REQ: 29
ATK: 6440 DEF: 8614
Mastery: 40/40
Card XP: MAX 100%
Ability: Super Soldier
Ability Lv: 1 Usage: High
Effect: Significantly intensify defense on your Tactics Cards.
BRUISER (SS Rare)
[Logan's Spirit] Wolverine+
Lv: 60/60 PWR REQ: 21
ATK: 8694 DEF: 6602

COLLECTION

CHARACTERS | UPGRADES | SUPPORT CARD | SELL

40 V

27 V
John Stewart
Green Lantern
14,850 26,623

40 V
Regime
Green Lantern
7,871 11,933

40 V
Arkham
Harley Quinn
16,324 23,866

40 I
Hawkgirl
7,871 14,170

40 I
Insurgency
Lex Luthor
3,428 5,847

40 V

40 V
New 52
Green Lantern
3,148 4,176

40 V
Harley Quinn
2,332 3,978

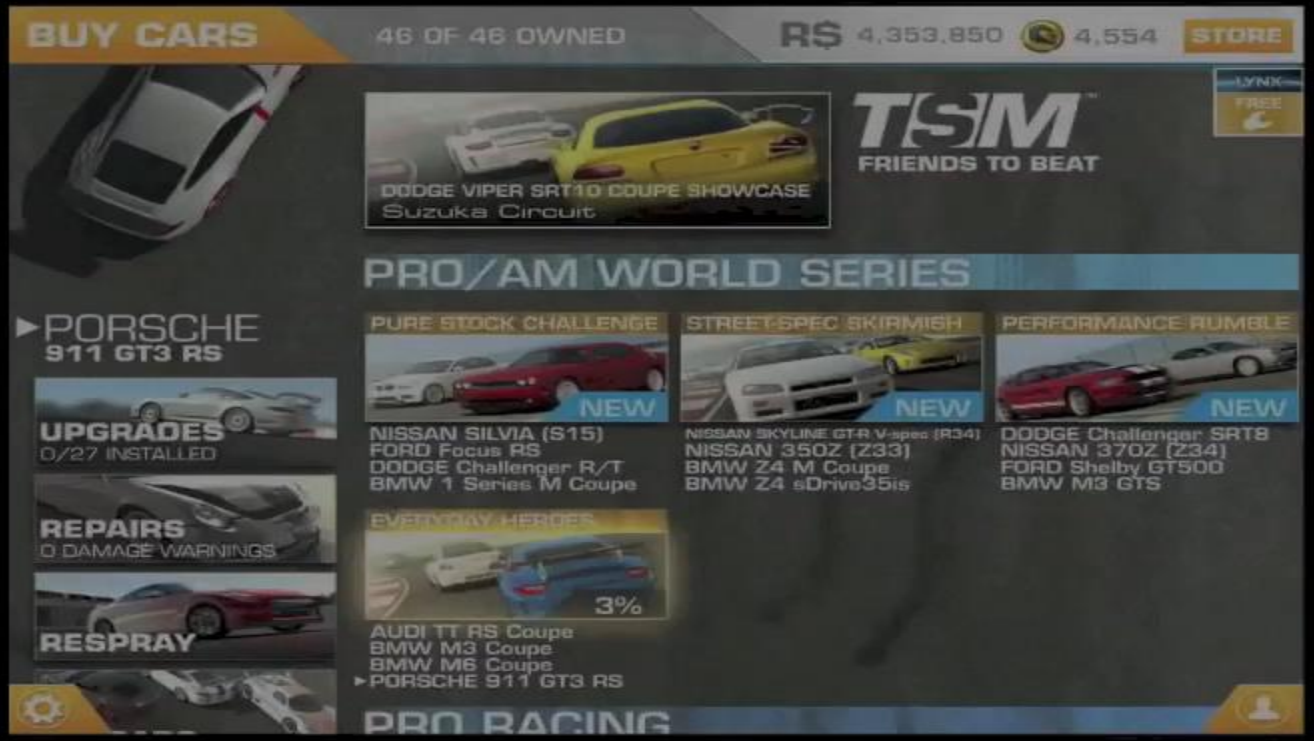
40 V
Insurgency
Harley Quinn
6,646 9,546

40 V
Lex Luthor
2,565 4,375

40 III
Lobo
14,867 29,832

Back

705 5 51,780


BUY CARS
46 OF 46 OWNED
R$ 4,353,850
4,554
STORE
DODGE VIPER SRT10 COUPE SHOWCASE
Suzuka Circuit
TSM
FRIENDS TO BEAT
FREE
PRO/AM WORLD SERIES
PORSCHE
911 GT3 RS
UPGRADES
0/27 INSTALLED
REPAIRS
0 DAMAGE WARNINGS
RESPRAY
PURE STOCK CHALLENGE
NEW
NISSAN SILVIA (S15)
FORD Focus RS
DODGE Challenger R/T
BMW 1 Series M Coupe
STREET-SPEC SKIRMISH
NEW
NISSAN SKYLINE GT-R V-spec (R34)
NISSAN 350Z (Z33)
BMW Z4 M Coupe
BMW Z4 sDrive35is
PERFORMANCE RUMBLE
NEW
DODGE Challenger SRT8
NISSAN 370Z (Z34)
FORD Shelby GT500
BMW M3 GTS
EVERYDAY HEROES
3%
AUDI TT RS Coupe
BMW M3 Coupe
BMW M6 Coupe
PORSCHE 911 GT3 RS
PRO RACING

Your New Card
PACK
SPEED
Spider-Man (Uncommon)

Deathstroke

Insurgency

ENERGY

CURRENT LEVEL
17

19812/28000 XP

DAMAGE
945

RANK
NORMAL

HEALTH
840

EXTRA CARDS
0

SUPPORT ENHANCEMENTS

Lock And Load	Sword Spin	Full Auto	Eye for an Eye
	1	2	LEVEL:20

23 0 16,150

Deathstroke
Insurgency
ENERGY
Sword Spin
Deathstroke dances a dance of death, his sword cutting a path through his opponents.
MIN DAMAGE:
245
264
MAX DAMAGE:
491
529
Sword Spin
Deathstroke Insurgency
1,000
CANCEL
BUY
Lock And Load
Eye for an Eye
LEVEL: 20
23
0
16,150

toucharcade

Conclusions

- Collectibles are an element of gameplay that can be applied to many games beyond CBGs.
- Make sure you have desirable items.
- The stats need to be clearly represented.
- A clear growth path is very important.

Q & A

Appendix

rankings as of 2/28/2014

	Facebook Top Grossing [Source: Facebook]	iPhone Top Grossing [Source: AppAnnie]	iPad Top Grossing [Source: AppAnnie]	Android Top Grossing [Source: AppAnnie]
1	Candy Crush Saga	Clash of Clans	Clash of Clans	Clash of Clans
2	Farmville 2	Candy Crush Saga	Candy Crush Saga	Candy Crush Saga
3	DoubleDown Casino	Game of War: Fire Age	Game of War: Fire Age	Farm Heroes Saga
4	Farm Heroes Saga	Big Fish Casino	DoubleDown Casino	Hay Day
5	Slotomania	Crime City	Big Fish Casino	Pet Rescue Saga
6	Texas HoldEm Poker	Modern War	Hay Day	Castle Clash
7	War Commander	The Hobbit	Farm Heroes Saga	Marvel War of Heroes
8	Battle Pirates	Farm Heroes Saga	Modern War	The Simpsons: Tapped out
9	Pet Rescue Saga	Hay Day	GSN Casino	Slotomania
10	High 5 Casino	Slotomania	Bingo Bash HD	The Hobbit
11	DoubleU Casino	Pet Rescue Saga	Slotomania HD	Brave Frontier
12	Farmville	DoubleDown Casino	The Hobbit	Jackpot Party Casino
13	Stormfall: Age of War	Marvel War of Heroes	Pet Rescue Saga	Knights & Dragons
14	Bingo Blitz	Knights & Dragons	Jackpot Party Casino	Empire: Four Kingdoms
15	Criminal Case	Star Wars Force Collection	Crime City HD	Dragons of Atlantis: Heirs
16	Top 11 Be a Football Manager	Dragon City	The Sims FreePlay	Bingo Blitz
17	Jackpot Party Casino	The Simpsons: Tapped Out	Bingo Blitz	Jackpot Slots
18	GSN Casino	Brave Frontier	Slotomania	DoubleDown Casino
19	Marvel Avengers Alliance	GSN Casino	War of Nations	Papa Pear Saga
20	Papa Pear Saga	Zynga Poker	The Simpsons: Tapped Out	Dragon City
21	Caesar's Casino	Underworld Empire	Slots - Pharaoh's Way	Age of Warring Empire
22	Heart of Vegas	myVegas Slots	Dragon City	Big Fish Casino
23	Soldiers Inc.	Jackpot Party Casino	myVegas Slots	Slot City
24	Pepper Panic Saga	The Sims FreePlay	Papa Pear Saga	Bingo Bash
25	Mafia Wars	Puzzles & Dragons	The Secret Society	Minecraft

Saga-Style

Invest & Express

Social Casino

Non-Casual