

The Year in Social Games, 2010 - 2011

Dave Rohrl, Creative Director, Playdom
Steve Meretzky, VP Game Design, Playdom



GDC Online • Austin • October 2011

The Year in Social Games, 2010 - 2011



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

Accept X



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

Accept X



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

Accept X



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

Accept X



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

Accept X



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

Accept X



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

Accept X



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

Accept X



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

Accept X



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

Accept X



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

Accept X



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

Accept X

**Social Gaming,
2009**



**Social Gaming,
2010**



**Social Gaming,
2011**



**Console Gaming,
2011**




















Trend #1



















LONG, LONG TAILS

- The social gaming leaderboard changes all the time
- Hot new releases are the key to success

- # MYTH
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 - Hot new releases are the key to success

	Application Name	Monthly Active Users	Daily Active Users	Release Date
5	 CityVille	83,798,200	15,687,291	12/2010
7	 FarmVille	37,741,181	8,945,684	
8	 Empires & Allies	50,116,918	7,157,416	6/2011
10	 Texas HoldEm Poker	35,333,129	6,677,001	
15	 FrontierVille	13,281,510	3,588,707	
16	 Gardens of Time	14,882,901	3,524,372	4/2011
18	 Bejeweled Blitz	10,700,657	3,005,255	
20	 Café World	11,670,626	2,576,347	
29	 Diamond Dash	10,190,630	1,588,718	3/2011
30	 Bubble Island	9,258,300	1,578,384	
32	 Monster World	8,396,636	1,516,297	
36	 Pet Society	9,424,522	1,326,845	
37	 Mafia Wars	7,520,668	1,321,184	
40	 Millionaire City	7,920,802	1,237,206	
41	 Treasure Isle	6,745,050	1,228,596	
43	 Bubble Saga	6,904,947	1,194,999	4/2011
49	 Restaurant City	5,188,048	1,110,692	
50	 Words With Friends	3,471,333	1,083,390	6/2011

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Long, Long Tails

AIAS NPD TOP 10 VIDEO GAME SALES

Select Year and Month:

2010 - December

Go

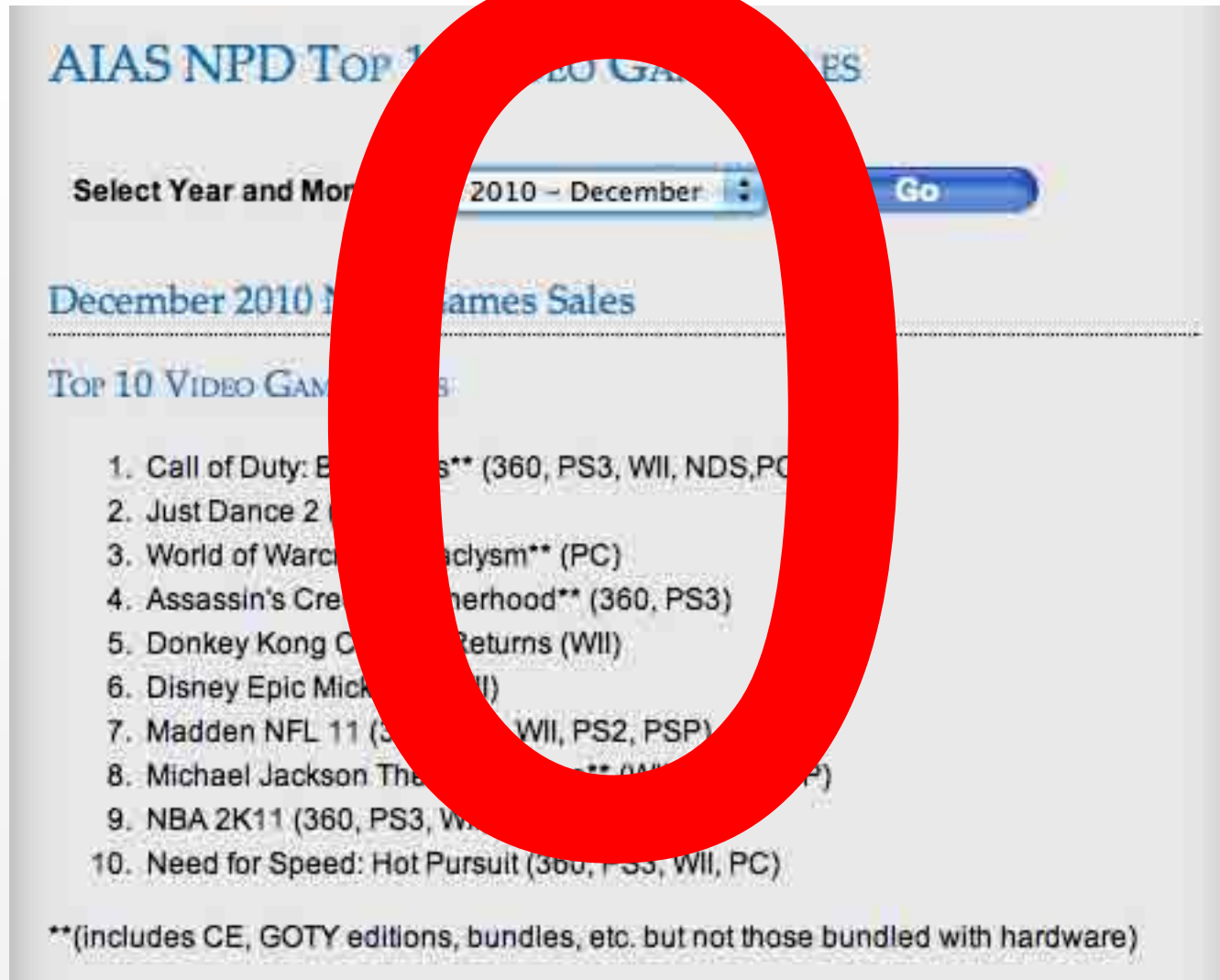
December 2010 NPD Games Sales

TOP 10 VIDEO GAME TITLES

1. Call of Duty: Black Ops** (360, PS3, Wii, NDS, PC)
2. Just Dance 2 (Wii)
3. World of Warcraft: Cataclysm** (PC)
4. Assassin's Creed: Brotherhood** (360, PS3)
5. Donkey Kong Country Returns (Wii)
6. Disney Epic Mickey** (Wii)
7. Madden NFL 11 (360, PS3, Wii, PS2, PSP)
8. Michael Jackson The Experience** (Wii, NDS, PSP)
9. NBA 2K11 (360, PS3, Wii, PSP, PS2, PC)
10. Need for Speed: Hot Pursuit (360, PS3, Wii, PC)

** (includes CE, GOTY editions, bundles, etc. but not those bundled with hardware)

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6. Disney Epic Mickey (Wii)
7. Madden NFL 11 (360, PS3, Wii, PS2, PSP)
8. Michael Jackson The Experience** (360, PS3, Wii, PC)
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Hypotheses

- Zynga games are durable
- But
 - Petville
 - Fishville
 - Roller Coaster Kingdom
- And
 - Bejeweled Blitz
 - Bubble Island
 - Pet Society

Hypotheses

- ~~Zynga games are durable~~
- Games As A Service

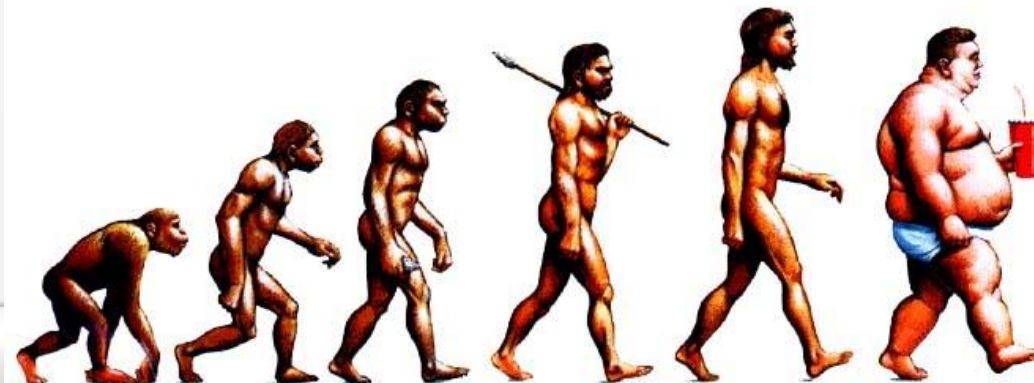
High Maintenance



Zynga Poker c. 2008



Zynga Poker c. 2011



Can Your Game Be a Service?

- Fun, solid core game
- Heavy commitment to live operations

Trend #2

**VIRALITY:
ALIVE AND WELL**

- Facebook has killed all the viral channels
- Virality is no longer a significant way to acquire players to social games

- 
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Steven Meretzky

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Gardens of Time

SCRABBLE

Army Attack

Sorority Life

Game Requests

5

[More ▾](#)

Friends on chat



Notifications

**Trevor Smith, Luis Valles, and 4 other friends** sent you requests in **Army Attack**.

about an hour ago

**Greg Costikyan, Jeremy Shea, and 8 other friends** sent you requests in **ESPN Sports Bar & Grill**.

about an hour ago

**Vernon Dunmore and Andy Schmoll** sent you requests in **Gardens of Time**.

2 hours ago

**Alex Ou** sent you a request in **Deep Realms**.

3 hours ago

[See All Notifications](#)

Top News • Most Recent ▾

Question

e Facebook Like with Your Share

Install the Facebook Like with AddThis

Facebook Like button to your AddThis code. AddThis is the largest sharing platform, helping publishers increase traffic and bring to sites like Facebook, Twitter



Karen Clark

**Karen just reached level 4 in Sports Bar!**

Karen is one step closer to managing the best Sports Bar on Facebook!



3 hours ago via ESPN Sports Bar & Grill • Like • Comment • Claim Reward

**Malte Kosian** is now friends with David Perry and 3 other people.

10 minutes ago

**David Greene** likes BASS DRUM OF DEATH and Buddy's Pizza.

11 minutes ago

**Martha Sapeta** is playing Mall World.

The place where you can be your own boss, run your own fashion boutique, and open to your heart's content.

Upcoming Events

[See All](#)**Peanut Labs Presents: SG4...**

Today 6:00pm



Birthdays: Jody Levine, Maureen Bunney, Paul Wridner

Find More Friends

Steven, More Friends Are Waiting

These 5 friends found their friends using the friend finder. Have you found all of your friends? Give it a try.

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Pokes



Steve Moore-Riley • Poke Back





Steven Meret
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Friends

More ▾

5

More ▾

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What's the event?

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Email Password

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10 minutes ago

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11 minutes ago

**Martha Sapeta** is playing **Mall World**.

The place where you can be your own boss, run your own fashion boutique, and open to your heart's content.

Virality

- Yes, not what it used to be
- But still a good way to acquire users
- And... it's still (pretty much) free!



Dr. Cat and **Brad Serwin** started playing Six Gun Galaxy.



It's the wild west again. Explore the world of Six Gun Galaxy.



7 minutes ago • [Play Six Gun Galaxy](#)

MY PLAYDOM: Gnome Town Gardens of Time Sorority Life Social City City of Wonder



Playdom

Like Steven Meretzky, Sarah Kuehnle and 96,629 others like this.

Subscribe

Give a review!

Free Gifts

Play

Add Neighbors

Invite Friends

Get Bucks & Coins

Help

ESPN

Roddick upsets Ferrer after moving to Court 13

The Doug Gottlieb Show



Daniel Cook is playing Total Domination: Nuclear Strategy. 52 minutes ago

Richard Dansky is playing SCRABBLE. 15 minutes ago

Bruce Ferguson is playing ESPN Sports Bar & Grill. 7 minutes ago

Daniel Bernstein achieved Friends will be friends in The Sims Social. 4 minutes ago



Friends will be friends

Raph Koster achieved Save Your Friend! Part 2 in Adventure World. 4 minutes ago



Complete Save Your Friend! Part 2.

Frank Lantz is playing Social Empires. 4 minutes ago

Sponsored

See All

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[Free Gifts](#)[Play](#)[My Neighbors](#)[Invite Friends](#)[Add Coins & Cash](#)[Earn City Cash](#)[GameCards](#)[Help](#)

6,865

5



More in 4:15

10



100

2



01

**ADD COINS & CASH****zynga® GAZETTE**

Steve's Town Is Born!

Will Steve Have What It Takes To Be Mayor?

**SHARE THE NEWS AND COINS****STEVE'S TOWN**

POPULATION: 30/120



Steve



Samantha



6,865 5 More in 2:28 10 100 2 01

**ADD COINS & CASH**

GROW YOUR CITY FASTER WITH NEIGHBORS!

Neighbors can send free energy, gifts and trains!

ADD NEIGHBORS**STEVE'S TOWN**
POPULATION: 30/120

< << >> >

ADD FRIEND ADD FRIEND ADD FRIEND ADD FRIEND ADD FRIEND

Steve 1 1

Samantha 20 20

BUILD



6,665

6



13



100

4



BONUS!

ADD COINS & CASH

+10 Population

YOU REACHED LEVEL 2!

STEVE'S TOWN IS NOW A
CROSSROADS

UNLOCKED:

Terrific job on your city's
amazing growth! Share the news
and Experience!

SHARE XP

ADD
FRIENDADD
FRIENDADD
FRIENDADD
FRIENDADD
FRIEND★ 1
♥ 1★ 20
♥ 20



6,680

6



13



100

4



02



ADD COIN

COIN
LEVEL 30
CASH
LEVEL 30STEVE'S T
POPULATION: 4ADD
FRIENDADD
FRIENDADD
FRIENDADD
FRIENDADD
FRIEND★ 1
♥ 1★ 20
♥ 20

BUILD

INVITE FARMVILLE FRIENDS



Your Farmville friends would really enjoy it here in the city!
Why not invite them over?

**INVITE FARM FRIENDS****BONUS!**

[Free Gifts](#)[Play](#)[My Neighbors](#)[Invite Friends](#)[Add Coins & Cash](#)[Earn City Cash](#)[GameCards](#)[Help](#)

6,543

6



More in 4:44

11



100

6



02



ADD COINS & CASH

BONUS!

FIRST NEIGHBORHOOD

GOAL COMPLETE!

REWARDS



50 coins



Did you know: Mayors can build seaports? Give your friends coins to start their own city!

SHARE COINS NOW**STEVE'S TOWN**

POPULATION: 40/120



ADD FRIEND



ADD FRIEND



ADD FRIEND



ADD FRIEND



ADD FRIEND

Steve

★ 1
♥ 1

Samantha

★ 20
♥ 20



6,558

6



More in 2:51

11



100

6



02



ADD COINS & CASH

TRAIN PLATFORM

BONUS!

SEND YOUR OWN TRAIN!



You need 5 more neighbors

...before you can send trains to
neighboring cities!

ADD NEIGHBORS



STEVE'S TOWN

POPULATION: 50/120

ADD
FRIENDADD
FRIENDADD
FRIENDADD
FRIENDADD
FRIEND

Steve

★ 1
♥ 1

Samantha

★ 20
♥ 20



6,558

6



More in 1:16

11



100

6



02



ADD COINS & CASH

**SEND SOME GIFTS TO YOUR FRIENDS!**

It's free and a great way to help them get started.

SEND GIFTS TO FRIENDS**STEVE'S TOWN**

POPULATION: 50/120



ADD FRIEND



ADD FRIEND



ADD FRIEND



ADD FRIEND



ADD FRIEND

Steve
★ 1
♥ 1Samantha
★ 20
♥ 20



6,558

6



13



100

6



ADD COINS & CASH



BONUS!

ADD NEIGHBORS!



It's more fun when you've got friends around.

ADD NEIGHBORS



STEVE'S TOWN

POPULATION: 50/120



ADD FRIEND



ADD FRIEND



ADD FRIEND



ADD FRIEND



ADD FRIEND

Steve

★ 1
♥ 1

Samantha

★ 20
♥ 20



6,367

6



More in 3:58

7



410

12



BONUS!

ADD COINS & CASH

BUILDING COMPLETE!

Construction of your Bakery is finished!

Name your Bakery:

Steve's Bakery

SAVE

SAVE AND SHARE COINS



STEVE'S TOWN

POPULATION: 50/120

ADD
FRIENDADD
FRIENDADD
FRIENDADD
FRIENDADD
FRIEND

Steve

★ 1
♥ 1

Samantha

★ 20
♥ 20



6,315

6



More in 1:46

7



400

12



02



ADD COINS & CASH



FARMIN' WITH RITA

**GOAL COMPLETE!**

REWARDS



Gray Bunny



Thanks fer helpin'. Looks like you found a lost bunny in the fields! Share the news!

SHARE HARVEST XP**STEVE'S TOWN**

POPULATION: 50/120



Steve



Samantha





6,365

6



More in 0:02

7



400

12



02



ADD COINS & CASH



THE LOST BUNNY

**GOAL COMPLETE!**

REWARDS



50 coins



The 'lil bunny looks mighty cozy in her new home! Share your hoppin' success!

SHARE BUNNY XP



STEVE'S TOWN

POPULATION: 50/120



6,365 6 More in 3:51 7 425 13 02



ADD COINS & CASH

BUILD A BAKERY!

GOAL COMPLETE!

REWARDS



25 goods



C'est bon! Tell friends about your new bakery, and I'll tell them you're running for Mayor!

SHARE YOUR GOODS**STEVE'S TOWN**
POPULATION: 50/120

[Free Gifts](#)[Play](#)[My Neighbors](#)[Invite Friends](#)[Add Coins & Cash](#)[Earn City Cash](#)[GameCards](#)[Help](#)

6,355

6



More in 1:51

7



415

13



02

**ADD COINS & CASH**

PLANT A CITY FLAG



GOAL COMPLETE!

REWARDS



Unlocked:
City Hall



Great! Now you can build a City Hall!
Tell your friends you're now on the
path to being an official city!

GIVE FLAG XP

Click to chop

**STEVE'S TOWN**
POPULATION: 50/120

Steve



Samantha



[Free Gifts](#)[Play](#)[My Neighbors](#)[Invite Friends](#)[Add Coins & Cash](#)[Earn City Cash](#)[GameCards](#)[Help](#)

6,355

6



More in 0:53

7



415

13



02

**ADD COINS & CASH****zynga® GAZETTE**

Steve Flies Steve's Town Flag Proudly!

Steve Pledges Allegiance To Mayoral Campaign!

**SHARE THE NEWS AND COINS****STEVE'S TOWN**

POPULATION: 50/120



Free Gifts

Play

My Neighbors

Invite Friends

Add Coins & Cash

Earn City Cash

GameCards

Help



5,555

7



More in 3:42

13



415

16



03



ADD COINS & CASH

BONUS!

YOU REACHED LEVEL 3!



STEVE'S TOWN IS NOW A
ONE-HORSE TOWN

UNLOCKED:



Terrific job on your city's
amazing growth! Share the news
and Experience!

SHARE XP

ADD
FRIENDADD
FRIENDADD
FRIENDADD
FRIENDADD
FRIEND★ 1
♥ 1★ 20
♥ 20

BUILD

STEVE
POPULAR

Steve

Samantha



4,279

7



More in 0:29

8



430

26



03

BONUS!

ADD COINS & CASH

BUILDING COMPLETE!

Construction of your Toy Store is finished!

Name your Toy Store:

Steve's Toy Store

SAVE

SAVE AND SHARE COINS



STEVE'S TOWN

POPULATION: 120/120

ADD
FRIENDADD
FRIENDADD
FRIENDADD
FRIENDADD
FRIEND

Steve

★ 1
♥ 1

Samantha

★ 20
♥ 20

Free Gifts

Play

My Neighbors

Invite Friends

Add Coins & Cash

Earn City Cash

GameCards

Help



4,279

7



More in 3:01

9



430

26



03



ADD COINS & CASH

BONUS!



f Post to Your Wall



via CityVille

Steve plays nicely with money-man Edgar.

Steve has toyed around with Edgar and he likes it. Click here to earn playful goods.



Publish

Skip



STEVE'S TOWN

POPULATION: 120/120



Steve



Samantha





4,339

7



More in 1:17

7



395

28



ADD COINS & CASH



RITA'S RENT!



GOAL COMPLETE!

REWARDS



25 goods



Thanks for stoppin' by! C'mon back soon to collect more. Tell friends about your progress!

SHARE RENT XP



STEVE'S TOWN

POPULATION: 120/120





3,349

8



More in 4:34

14



395

32



BONUS!

ADD COINS & CASH

YOU REACHED LEVEL 4!

STEVE'S TOWN IS NOW A
TWO-HORSE TOWN

UNLOCKED:



Terrific job on your city's
amazing growth! Share the news
and Experience!

SHARE XP

ADD
FRIENDADD
FRIENDADD
FRIENDADD
FRIENDADD
FRIEND

Steve

★ 1
♥ 1

Samantha

★ 20
♥ 20



3,349

8



More in 3:24

11



395

34



04



ADD COINS & CASH

CITY HALL

5 / 5 Builds

Click to finish

STAFF YOUR CITY HALL

Community Buildings need to be staffed with employees.
Hire your friends to work in your City Hall!

COUNCIL
MEMBER

Fill Position



1

CITY
TREASURER

Fill Position



1

CITY CLERK



Fill Position



1

HIRE FRIENDS



STEVE'S TOWN

POPULATION: 120/120

ADD
FRIENDADD
FRIENDADD
FRIENDADD
FRIENDADD
FRIEND

Steve

★ 1
♥ 1

Samantha

★ 20
♥ 20

BUILD

[Free Gifts](#)[Play](#)[My Neighbors](#)[Invite Friends](#)[Add Coins & Cash](#)[Earn City Cash](#)[GameCards](#)[Help](#)

3,399

8



More in 2:09

9



385

36



04

**ADD COINS & CASH**

OPEN A FRANCHISE!



Ask a friend to open a business
in your city!

SHARE**STEVE'S TOWN**

POPULATION: 120/120

**ADD
FRIEND****ADD
FRIEND****ADD
FRIEND****ADD
FRIEND****ADD
FRIEND**

Steve

★ 1
♥ 1

Samantha

★ 20
♥ 20



3,524

8



1



410

37



BONUS!

THE PASTRY TOUR!

GOAL COMPLETE!

REWARDS



25 goods



Merci! I'm thinking you have the right recipe to be mayor. Tell your friends about your pastry tour!

SHARE PASTRY XP**SAMANTHA'S CITY**

POPULATION: 2,030/8,720



Steve



Samantha





3,524

8



More in 4:10

13



410

37



04



ADD COINS & CASH

THE FUSSY BAKER!

Excusez-moi! I require the finest chocolate!



Ask 2 friends to send Chocolate!

0 / 2



2 TO FINISH

ASK YOUR FRIENDS!



Andre says:

Only your friends can send the chocolate I require. Ask them, s'il vous plaît.

OKAY



STEVE'S TOWN

POPULATION: 120/120

ADD
FRIENDADD
FRIENDADD
FRIENDADD
FRIENDADD
FRIEND

Steve

★ 1
♥ 1

Samantha

★ 20
♥ 20

BUILD



2,349

8



More in 4:45

3



490

49



04

STAFF YOUR POST OFFICE

Community Buildings need to be staffed with employees.
Hire your friends to work in your Post Office!

**POST
MASTER**

Fill Position



1

**MAIL
CARRIER**

Fill Position



1

**POSTAL
INSPECTOR**

Fill Position



1

CITY CLERK

Fill Position



1

**STAMP
LICKER**

Fill Position



1

HIRE FRIENDS**ADD
FRIEND****ADD
FRIEND****ADD
FRIEND****ADD
FRIEND****ADD
FRIEND**

1



1



20



20

BUILD

[Free Gifts](#)[Play](#)[My Neighbors](#)[Invite Friends](#)[Add Coins & Cash](#)[Earn City Cash](#)[GameCards](#)[Help](#)

2,349

5



More in 3:13

3



490

52



ADD COINS & CASH



BUILD CITY HALL!



GOAL COMPLETE!

REWARDS



2 XP



Now that you've built your City Hall
someone has to be mayor.
I NOMINATE YOU!

SHARE XP



STEVE'S TOWN

POPULATION: 120/170

ADD
FRIENDADD
FRIENDADD
FRIENDADD
FRIENDADD
FRIEND


Steve

★ 1
♥ 1

Samantha


★ 20
♥ 20


[Free Gifts](#)[Play](#)[My Neighbors](#)[Invite Friends](#)[Add Coins & Cash](#)[Earn City Cash](#)[GameCards](#)[Help](#)

**2,349**

5 

 **More in 2:03**
3

**490**

52 **04**

**ADD COINS & CASH**

 **zynga® GAZETTE**

Steve Nominated For Mayor!

Will Mayor Bring Seaport And Worldly Goods To Steve's Town?



SHARE THE NEWS AND COINS

**STEVE'S TOWN**

POPULATION: 120/170



Steve


★ 1
♥ 1

Samantha


★ 20
♥ 20



Trend #3

**EVERYTHING MUST BE A
FRONTIER**

INSERT LAST
YEAR'S SLIDE
HERE!!!!

2009-2010: Year of the Farm

- Crops
- Spoilage
- Farm
- Neighbors

But Should It Really Be a Farm?



And Then....



Everything Must Be a Frontier

- Farmville
- Energy & Meals
- Doobers
- Debris
- Collections
- Critters
- Crafting

So, What About a Frontier?



Clone City



So, What About a Frontier?





Why Do Developers Do This?

- Reduced design risk
- Reduced learning curve

Trend #4

THE AGE OF HIGH QUALITY

Mob games



Mob Wars, Feb-2008



Crime City, Sep-2010

City-building games



Youtopia, Oct-2009



CityVille, Dec-2010

Zoo games



Zoo World, Nov-2009



Zoo World 2, Jun-2011

War games



Attack, Feb-2008



Empires & Allies, Jun-2011

Classic casual games



Scramble, Feb-2008



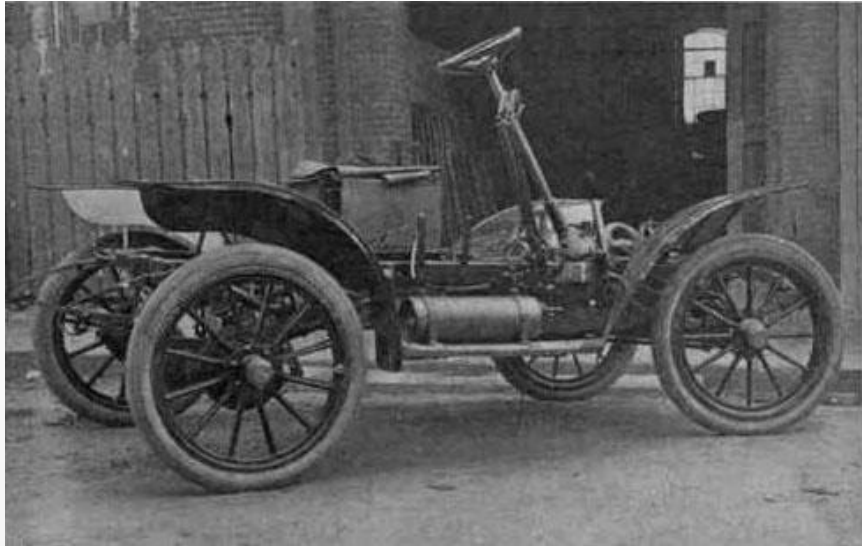
Gardens of Time, Apr-2011

The Outlier?

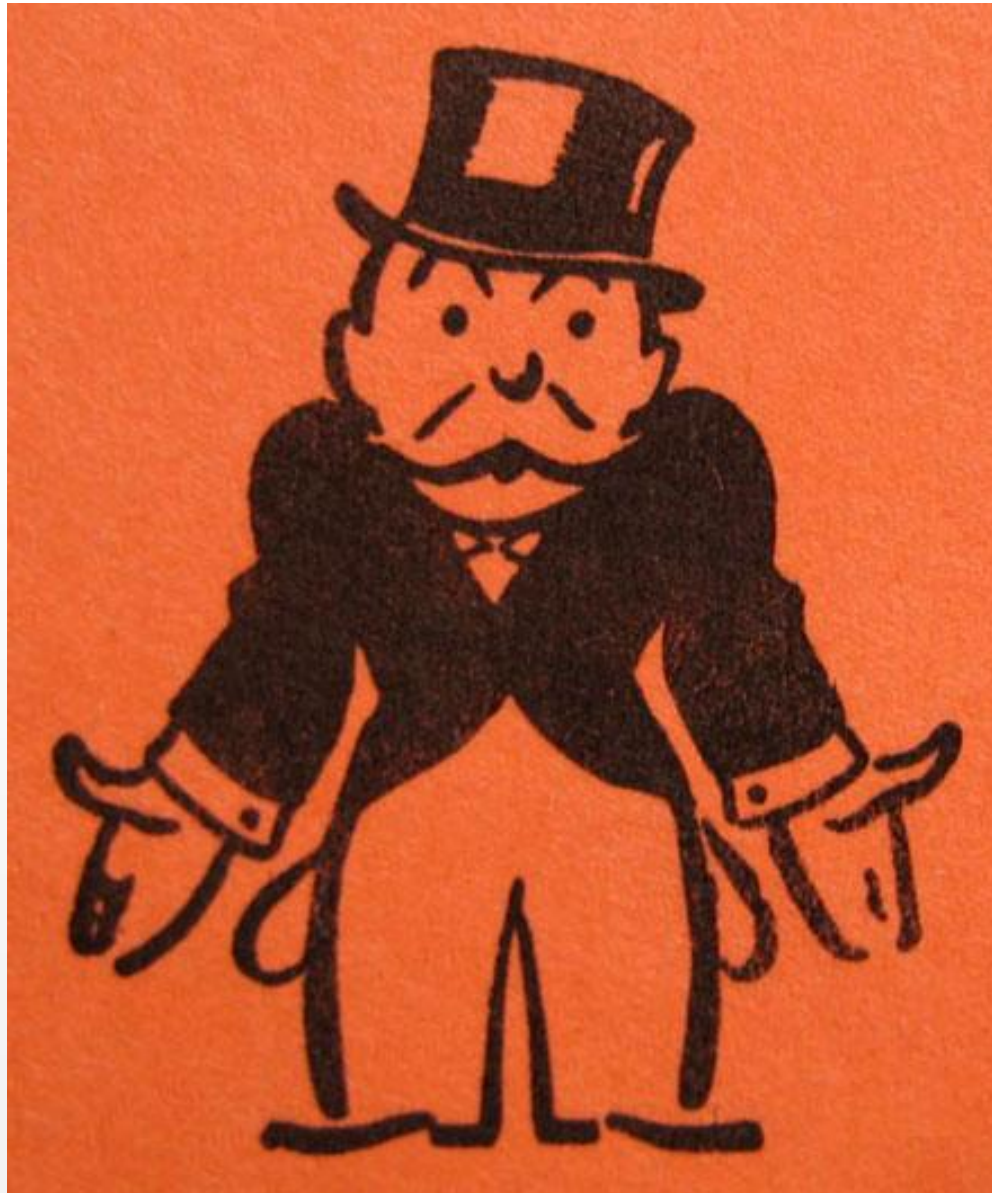


Words with Friends, Jun-2011

The “MVP”



- Visuals/Production Values
- Feature Set
- Polish
- Balance
- Stability



Trend #5

**LOCATIONS, LOCATIONS,
LOCATIONS**

When is a Location Not a Location?



How New Is This Really?



Mafia Wars CUBA Fly to NY Support | ToS | forum

Cuban Pesos (Bank) **C\$1,873** Health 121/136 (Hospital) Energy 305/272 Stamina 25/25 Experience 106746/107257 Level 130

Where's my cash?

Home Jobs Fight Businesses Inventory Godfather (18) Profile My Mafia (573)

BETA Mafia Wars: Cuba is currently in Beta and subject to change. BETA

Establish Contact With The FRG: Completed

You gained: C\$918, 53 Experience, 10% Job Mastery, RA-92

You spent: 35 Energy, C\$45 in bribes

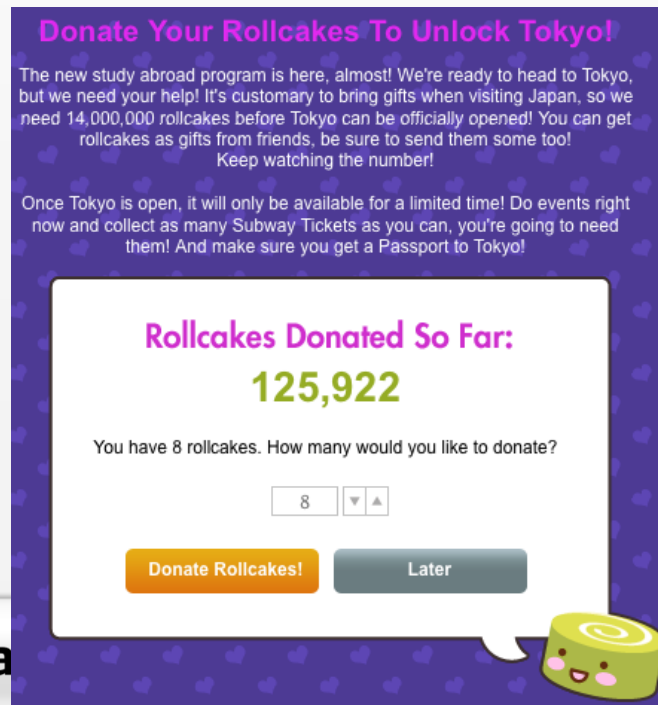
Job Mastery 30% Do This Job Again!

You gained a RA-92.



THE BRONX, NEW YORK Hide Map

Moscow
Failure is, unfortunately, an option.
Requirements: Travel Cost:
Level: 36 5
Mob: 5 500



Donate Your Rollcakes To Unlock Tokyo!

The new study abroad program is here, almost! We're ready to head to Tokyo, but we need your help! It's customary to bring gifts when visiting Japan, so we need 14,000,000 rollcakes before Tokyo can be officially opened! You can get rollcakes as gifts from friends, be sure to send them some too! Keep watching the number!

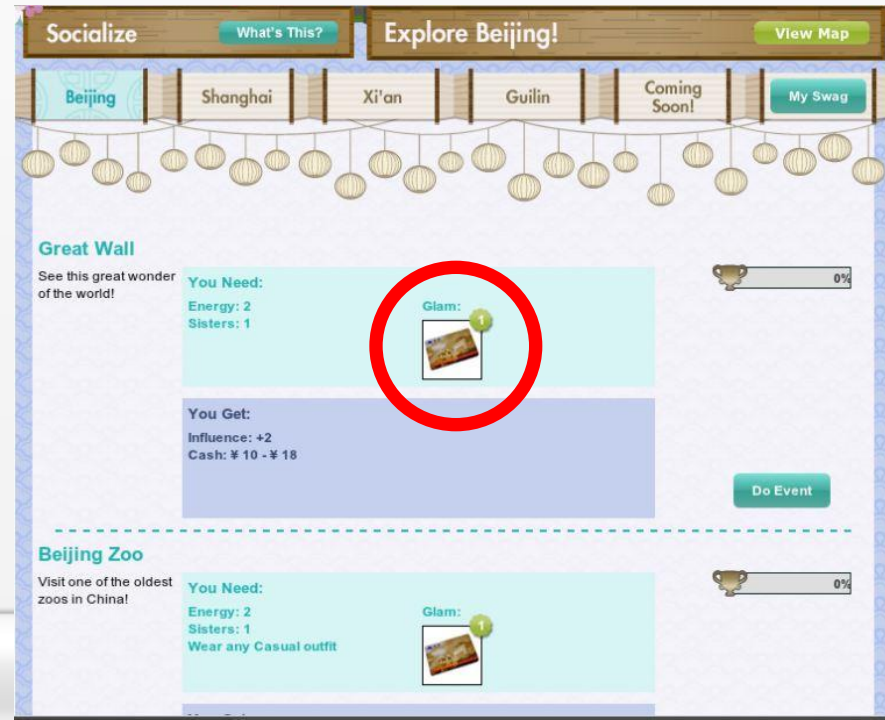
Once Tokyo is open, it will only be available for a limited time! Do events right now and collect as many Subway Tickets as you can, you're going to need them! And make sure you get a Passport to Tokyo!

Rollcakes Donated So Far:
125,922

You have 8 rollcakes. How many would you like to donate?

8

Donate Rollcakes! Later



Socialize What's This? **Explore Beijing!** View Map

Beijing Shanghai Xi'an Guilin Coming Soon! My Swag

Great Wall
See this great wonder of the world!

You Need: Energy: 2, Sisters: 1

You Get: Influence: +2, Cash: ¥ 10 - ¥ 18

Beijing Zoo
Visit one of the oldest zoos in China!

You Need: Energy: 2, Sisters: 1, Wear any Casual outfit

One Game, One Place



An Expanding World



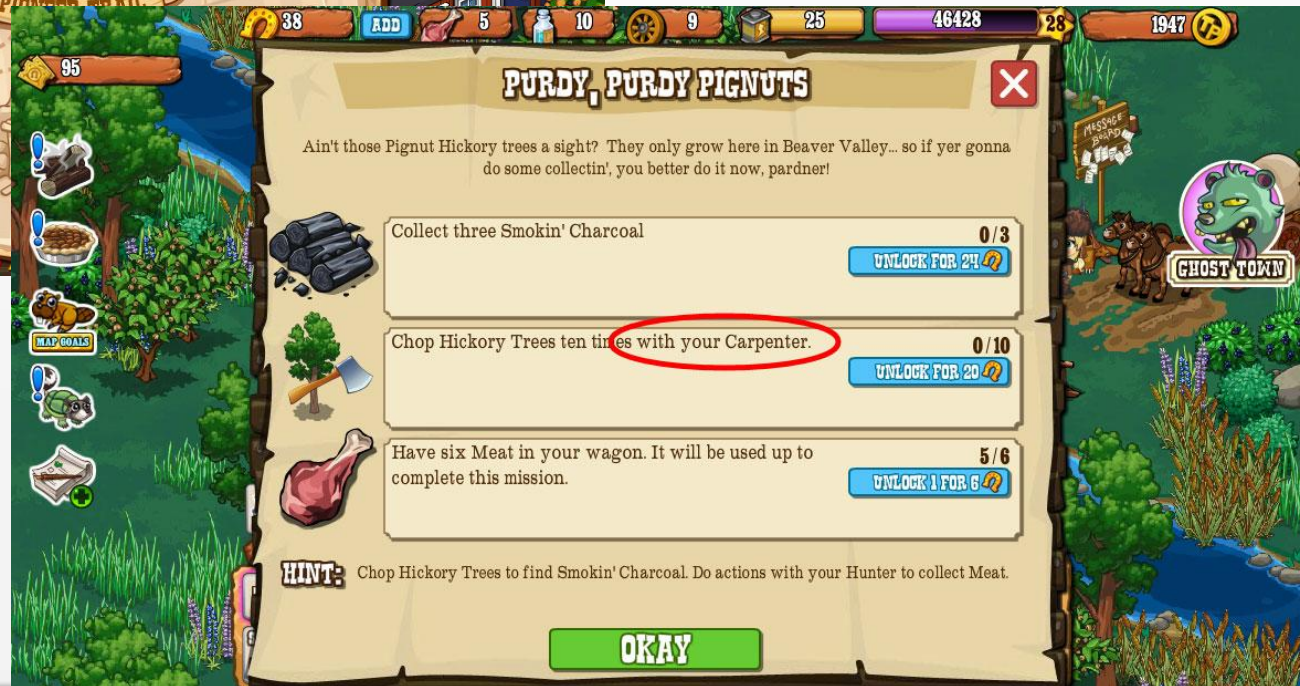
An Expanding World



A Wildly Expanding World



A Wildly Expanding World



A Wildly Expanding World



Impacts



Army Attack

By Digital Chocolate, Inc. | [Visit Application](#)

RANK Daily Active Users (DAU)

#169 323,149

Summary

Reach

Global Rank: #169

DAU: 323,149 daily uniques

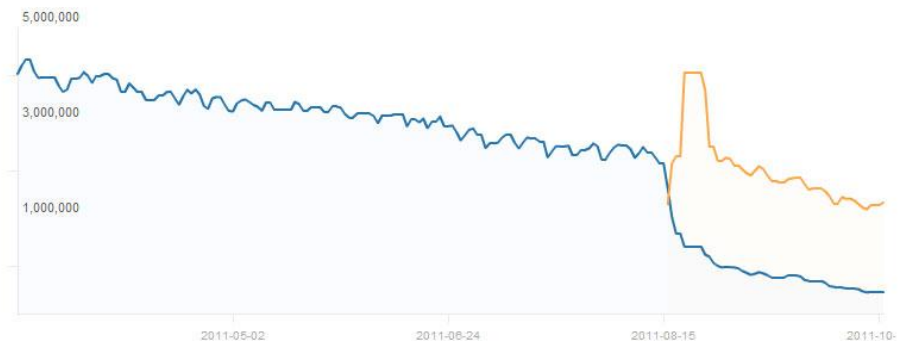
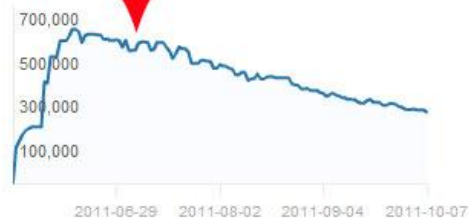
MAU: 2,377,171 monthly uniques

Categories:

Description: Ten-Hut! Listen up soldier, war has broken out and your services are needed to put together a resistance. An evil power has taken us by surprise and captured all the cities and villages. It's up to you to fight back and free the land.

Unique Active Users

View: [Daily](#) | [Weekly](#) | [Monthly](#)



☒ [FrontierVille - Daily Active Users](#)

☒ [Pioneer Trail - Daily Active Users](#)

Pioneer Trail

By Zynga
[Facebook About Page](#)

The Pioneer Trail is a new game from Zynga, maker of great games like FarmVille, Zynga Poker, and Cl...

FrontierVille

By Zynga
[Facebook About Page](#)

FrontierVille is a new game from Zynga, maker of great games like FarmVille, Zynga Poker, and CityVI...

So Why Bother?

- Some hardcore retention impact
- Monetize whales better

Trend #6

THE CASUAL INVASION

The Blitzes
are coming!

The Blitzes
are coming!





Zuma Blitz

December 2010 – 1.57 million peak DAU



Diamond Dash

March 2011 – 2.23 million current DAU

Like 6,364,466

Bubble Island



Bubble Island

February 2010 – 2.05 million current DAU



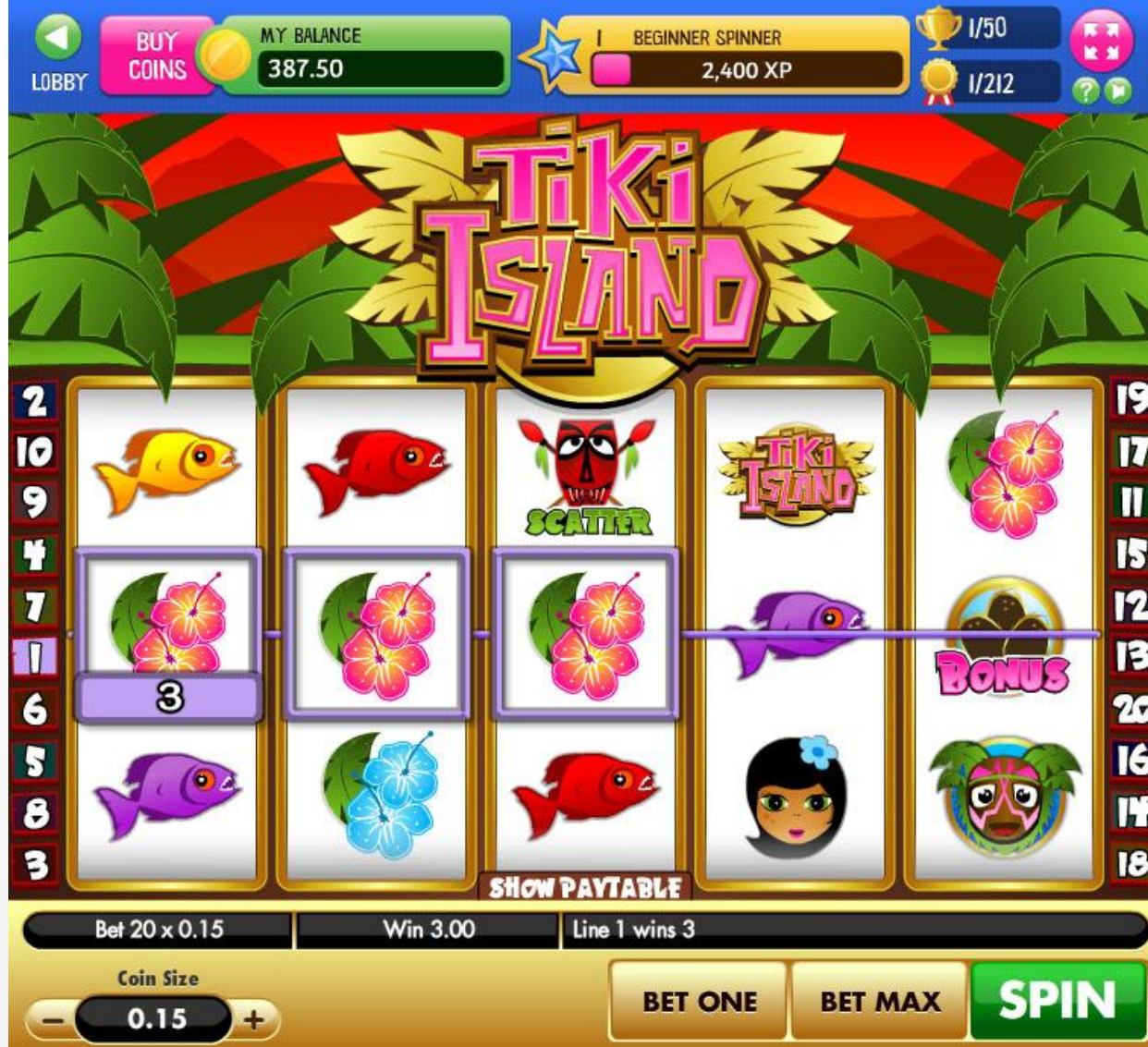
Bubble Saga
April 2011 – 1.33 million peak DAU



Words with Friends
June 2011 – 3.91 million current DAU



Slotomania
August 2011 – 1.44 million peak DAU



Jackpot Joy Slots
 July 2011 – 340K cuurent DAU



Bingo Blitz
November 2010 – 630K current DAU



Gardens of Time
April 2011 – 4.04 million peak DAU



Mystery Manor
March 2011 – 600K peak DAU



Catch a Killer
December 2010 – 30K peak DAU



Diner Dash
March 2011 – 230K peak DAU

Why?

- Demographics
- Familiarity
- Proven gameplay
- UA
- Short session length

Still Growing After...

- JackpotJoy Slots – 12 weeks
- Double Down Casino – 14 weeks
- Words With Friends – 18 weeks
- Diamond Dash – 28 weeks
- Bingo Blitz – 47 weeks
- Tetris Battle – 60 weeks
- Bubble Island – 86 weeks !!!

Trend #7

CASUAL CONFLICT

Facebook Competitive Gaming 2010





Fighting 2010 – Lunatic Fringe



Fighting, It's Not Just For Breakfast Any More



Army Attack –
600K+ Peak DAU

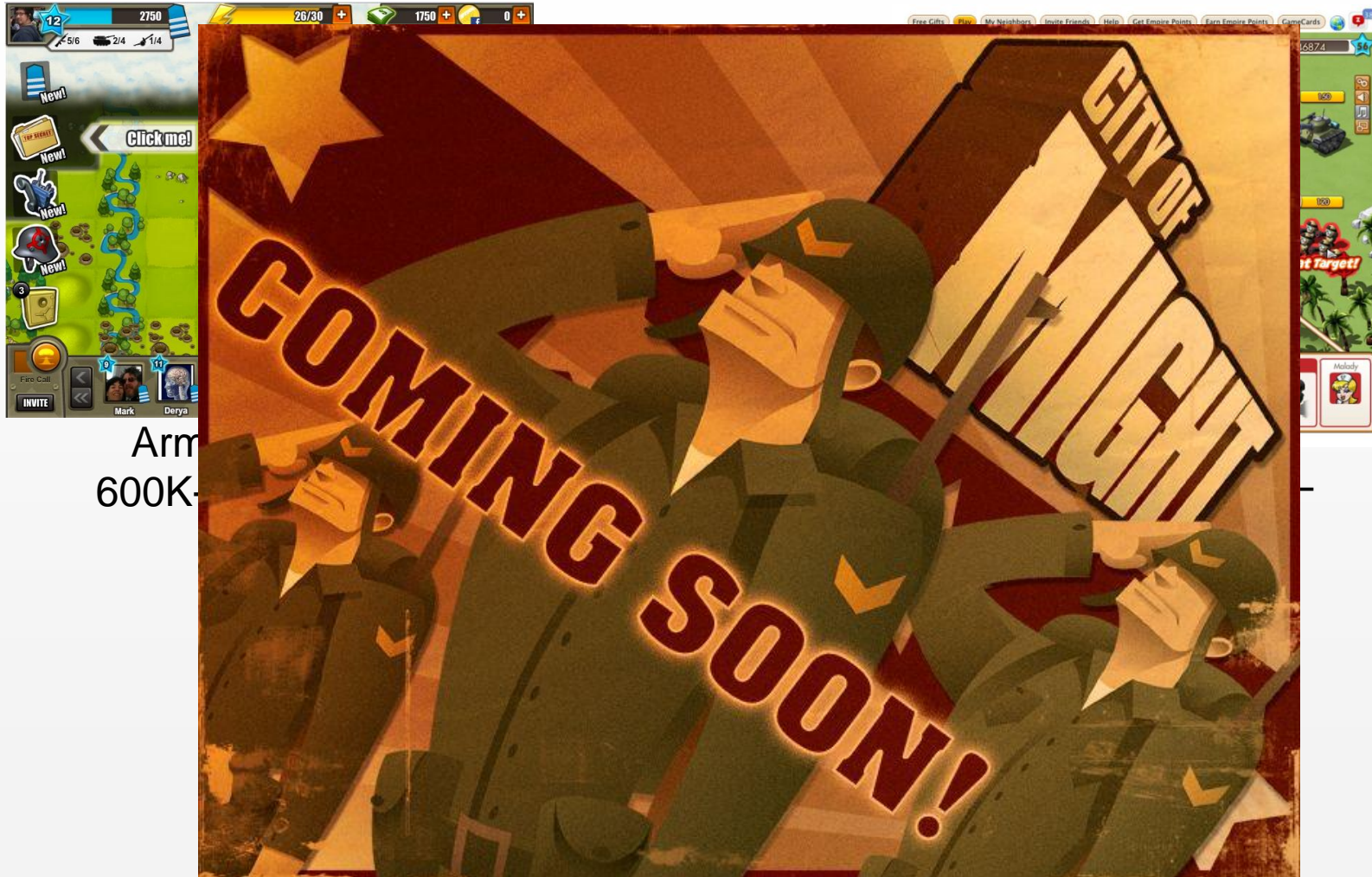


Empires & Allies –
4.8M DAU



Social Empires –
600K DAU (growing)

Fighting, It's Not Just For Breakfast Any More

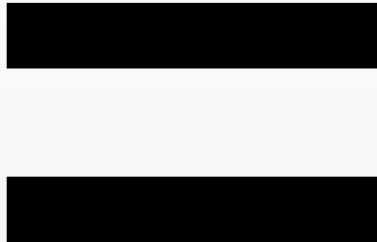


Fighting, It's Not Just For Breakfast Any More



NOTE: Size of graphic reflects anticipated success level.

Why?



And Why Now?

- Proven niche
- Player sophistication

Trend #8

THE RISE OF I.P.



FIFA Superstars
June 2010 – 811K peak DAU



Madden NFL Superstars
September 2010 – 328K peak DAU



ESPN U: College Town
September 2010 – 452K peak DAU

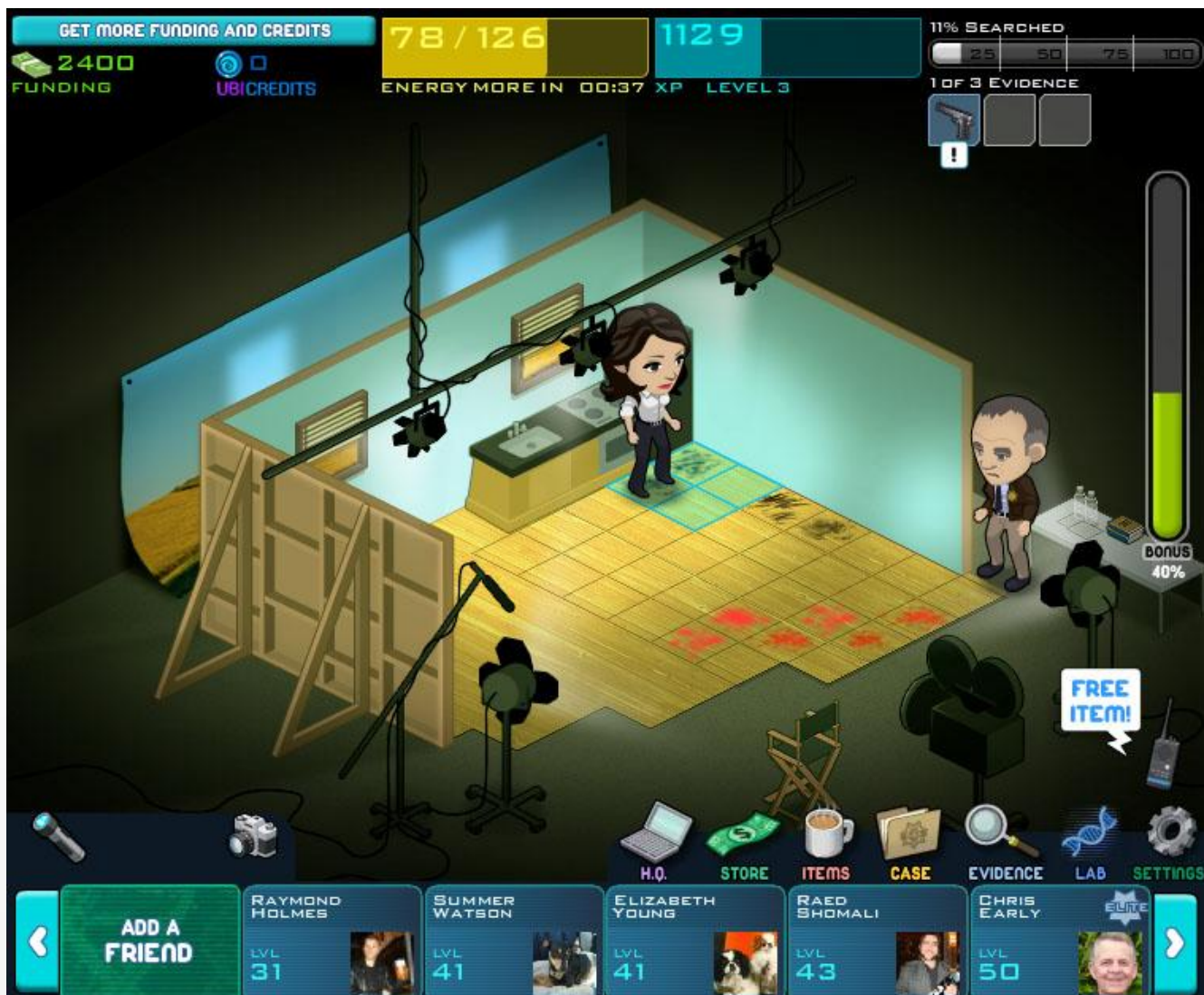


ESPN Sports Bar & Grill

July 2011 – 120K peak DAU



Monopoly Millionaires
February 2011 – 873K peak DAU



CSI: Crime City
October 2010 – 420K peak DAU



Smurfs & Co.
August 2011 – 1.43 million peak DAU



The Sims Social
August 2011 – 11.30 million peak DAU

Does it help?

Pros

- Makes UA easier
- Content

Cons

- Added costs
- Approvals
- Pressure

Trend #9

WHITHER THE FACEBOOK RPG?

Facebook RPG 2008-2009

Street Thug
(Levels 1-4)


Associate
(Levels 5-8)

Soldier
(Levels 9-12)








Enforcer
(Levels 13-17)

Hitman
(Levels 18-24)

More Jobs
(Levels 25+)




Boss Fight - Confront Agostino Cleto
 Your connection has decided to cut you out of his dealings. ? What's this?
Risk: \$682
Payout:
 \$8,400
 60 Experience
Requires:
 30 Energy
 16 Mafia
 X 9 X 3 X 2 X 2 **Fight!**

Description	Payout	This job requires.
Federal Reserve Raid ★ Level 1 Job Mastery 36% 	\$100,000 Experience: +30	25 Energy  X 3 X 10 X 10 Do Job
Smuggle Thai Gems ★ Level 1 Mastered 	\$110,000 Experience: +22 Chance to loot 	18 Energy  X 2 X 2 Do Job
Liquor Smuggling ★ Level 1 Job Mastery 0% 	\$425,000 Experience: +35	30 Energy  X 1 X 20 Do Job
Run Illegal Poker Game ★ Level 1 Job Mastery 0% 	\$600,000 Experience: +33	20 Energy  X 20 X 20 mmohut <small>THE MMORPGS AND MMO GAMES</small>

Facebook RPG 2008-2009

Street Thug
(Levels 1-4)
Associate
(Levels 5-8)
Soldier
(Levels 9-12)
Enforcer
(Levels 13-17)
Hitman
(Levels 18-24)
More Jobs
(Levels 25+)



Boss Fight - Confront Agostino Cleto

Your connection has decided to cut you out of his dealings. ? What's this?

Risk: \$682

Payout:

➔ **\$8,400**

➔ **60 Experience**

Requires:

➔ **30 Energy**

➔ **16 Mafia**

X 9 X 3 X 2 X 2

Fight!

Description	Payout	This job requires.	
Federal Reserve Raid	\$100,000 Experience: +30	25 Energy	X 3 X 10 X 10 Do Job
	\$110,000 Experience: +22 Chance to loot 2	18 Energy	X 2 X 2 Do Job
	\$125,000 Experience: +35	30 Energy	X 1 X 20 Do Job
	\$500,000 Experience: +33	20 Energy	X 20 X 20 Do Job

BBQd Ribz House: 20

Confidence: 100/100
Energy: 3/10
Stamina: 3/3
Cash: **\$9,190**
level: 4
Influence: 38/40

SORORITY LIFE

REFRESH

Jobs: (Current Income \$50, Current Upkeep: \$0)

Cashflow: \$50 every 60 minutes. Next paycheck in: 29 minutes



Earn a regular income by taking a job in your spare time. Hot Tip: greater influence means better job opportunities!

Sweet!

You started a job as a Dog Walker after spending \$1,000 for training.

You have unlocked the **Wage Slave** achievement by getting a first job.

The House Mom is impressed, and has rewarded you with **1** brownie points.

Job	START JOB / QUIT JOB
 <p>Dog Walker Income: \$50</p>	<p>Current Job Severance Pay: \$550</p> <p>Quit Job</p>
 <p>Dining Hall Assistant Income: \$150</p>	<p>Training Cost: \$5,000</p>

Facebook RPG 2008-2009

Street Thug
(Levels 1-4)

Associate
(Levels 5-8)

Soldier
(Levels 9-12)

Enforcer
(Levels 13-17)

Hitman
(Levels 18-24)

More Jobs
(Levels 25+)

Boss Fight - Confront Agostino Cleto
 Your connection has decided to cut you out of his dealings. What's this?
Risk: \$682
Payout:
 \$8,400
 60 Experience
Requires:
 30 Energy
 16 Mafia
 X9 X3 X2 X2 **Fight!**

Description	Payout	This job requires.	
Federal Reserve Raid	100,000	25 Energy	Do Job
			Do Job
			Do Job

Offensive Abilities

Fangs Owned: 20 Mastery Level 1: 20%	Learn/Unlearn +100 Improve +1,000	1 Attack 0 Defense
Vampiric Claws Owned: 8 Mastery Level 1: 0%	Learn/Unlearn +700 Improve +7,000	1 Attack 1 Defense
Enhanced Senses Owned: 20 Mastery Level 1: 0%	Learn/Unlearn +1,000 Improve +10,000	2 Attack 2 Defense
Animalistic Frenzy Owned: 20 Mastery Level 1: 20%	Learn/Unlearn +2,000 Improve +20,000	3 Attack 1 Defense

BBQd Ribz
 House: 20
 Confidence: 100/100
 Energy: 3/10
 Stamina: 3/3
 Cash: \$9,190
 Influence: 38/40
 level: 4

MAIN MENU | **SOCIALIZE** | **JOBS** | **BANK** | **HOUSE MOM** | **PR**

Jobs: (Current Income \$50, Current Upkeep \$50)
 Cashflow: \$50 every 60 minutes. Next paycheck in 60 minutes.
 Earn a regular income by taking a job in your spare time.

Sweet!
 You started a job at The House of Brownie. You have your first job. The House of Brownie brownie party.

Jobs

- Dog Walker**
 Income: \$50
- Dining Hall Assistant**
 Income: \$150

Facebook RPG 2008-2009

Street Thug (Levels 1-4) Associate (Levels 5-8) Soldier (Levels 9-12) Enforcer (Levels 13-17) Hitman (Levels 18-24) More Jobs (Levels 25+)

Boss Fight - Confront Agostino Cleto
Your connection has decided to cut you out of his dealings. What's this?
Risk: \$682

Payout:
\$8,400
60 Experience

Requires:
30 Energy
16 Mafia

X9 X3 X2 X2 **Fight!**

Description	Payout	This job requires.
Federal Reserve Raid	100,000 Experience: +30	25 Energy

Do Job

BBQd Ribz House: 20
Confidence: 100/100
Energy: 3/10
Stamina: 3/3
Cash: \$9,190
level: 4
Influence: 38/40

Jobs: (Current Income \$50, Current Upkeep \$50)
Cashflow: \$50 every 60 minutes. Next paycheck in 60 minutes.
Earn a regular income by taking a job in your spare time.

Sweet!
You started a job at BBQd Ribz.
You have your first job. The House of Ribz is now a brownie place.

Dog Walker
Income: \$50

Dining Hall Assistant
Income: \$150

Offensive Abilities

Fangs
Owned: 20
Mastery Level 1: 20%

Vampiric Claws
Owned: 8
Mastery Level 1: 0%

Enhanced Senses
Owned: 20
Mastery Level 1: 0%

Animalistic Frenzy
Owned: 20
Mastery Level 1: 20%

TREASURE CHEST
Each Treasure Chest Contains a random item, a letter or hint. Some boxes are extremely rare and you can only find them in our Market!

NEW VANGUARD SET

1x for 30 Favor Points! **Accept**
3x for 90 Favor Points! **Accept**

ALPHA SET

1x for 20 Favor Points! **Accept**
3x for 55 Favor Points! **Accept**

SPECIAL Guest

Lyla
16 Attack
13 Defense

Add Bookmark

Invite Beta Members! **EXTRA INVITE!**

WHICH DEMI-POWER WILL YOU AID?

NEWS
December 22 - Battle of the Dark Legion
December 19 - Sea Serpents! Atlantis!
December 10 - Facebook Issues
December 3 - Monster Achievements!
December 2 - Hero Leveling and Abilities!

BATTLE NEWS (Clear News/Refresh)

Facebook RPG 2008-2009

Street Thug (Levels 1-4) Associate (Levels 5-8) Soldier (Levels 9-12) Enforcer (Levels 13-17) Hitman (Levels 18-24) More Jobs (Levels 25+)

Boss Fight - Confront Agostino Cleto
Your connection has decided to cut you out of his dealings. What's this?
Risk: \$682

Payout:
\$8,400
60 Experience

Requires:
30 Energy
16 Mafia

X9 X3 X2 X2 **Fight!**

Description	Payout	This job requires.
Federal Reserve Raid	100,000 Experience: +30	25 Energy

Do Job

BBQd Ribz House: 20
Confidence: 100/100
Energy: 3/10
Stamina: 3/3
Cash: \$9,190
Influence: 38/40
My Stats

Jobs: (Current Income \$50, Current Upkeep \$50)
Cashflow: \$50 every 60 minutes. Next paycheck in 60 minutes.
Earn a regular income by taking a job in your spare time.

Sweet! You started a job at The House of Brownie.

Dog Walker
Income: \$50

Dining Hall Assistant
Income: \$150

Offensive Abilities

Fangs
Owned: 20
Mastery Level 1: 20%

Vampiric Claws
Owned: 8
Mastery Level 1: 0%

Enhanced Senses
Owned: 20
Mastery Level 1: 0%

Animalistic Frenzy
Owned: 20
Mastery Level 1: 20%

TREASURE CHEST
Each treasure chest contains random items, and the items are completely different from the last one.

NEW VANGUARD SET
1x for 30 Favor Points!
3x for 90 Favor Points!

ALPHA SET
1x for 20 Favor Points!
3x for 60 Favor Points!

SPECIAL GEM
Lava
16 Attack
13 Defense

Marc Maraya level 1
Health 100/100
Energy 100/100
Stamina 3/3
Mob: 1 Cash: \$200 Bank

THE BRONX
Home Missions Territories Attack Equipment Godfather My Mobster Recruit

The Bronx Missions
What better place for a kid from the streets, with a dumpster load of dreams, to begin his march to power?
Unlock new missions at Level 2 Location Mastery 0%

Meet Your Mob
143 friends are waiting to join you in a life of crime.
Rewards: \$150 - \$250 ★ +6
Requirements: 1 1 **DO THIS**

Hustle Pool
The local pool joint is awash in suckers.
Rewards: \$37 - \$85 ★ +4
Requirements: 5 1 **DO THIS**

Facebook 2009

BBQd Ribz House: 20

Confidence: 100/100
Energy: 3/10
Stamina: 3/3
Cash: **\$9,190**
level: 4
Influence: 38/40

My Stats

MAIN MENU | Socialize | JOBS | BANK | HOUSE MOM

Jobs: (Current Income \$50, Current Upk
Cashflow: \$50 every 60 minutes. Next paycheck in
Earn a regular income by taking a job in your sp

Sweet!

You started a job a
You have
first job.
The House
brownie p

Joe

Dog Walker
Income: \$50

Dining Hall Ass
Income: \$150

Blog | Forums | Help | Policies

MOBSTERS2 VENDETTA

Refresh

Back | Equipment | Godfather | My Mobster | Recruit

NEED A BOOST? MY LOOT

of dreams, to begin his march to power?

Education Mastery 0%

THE GODFATHER'S MISSION

of crime.

Requirements
1 1

DO THIS

0% BRONZE

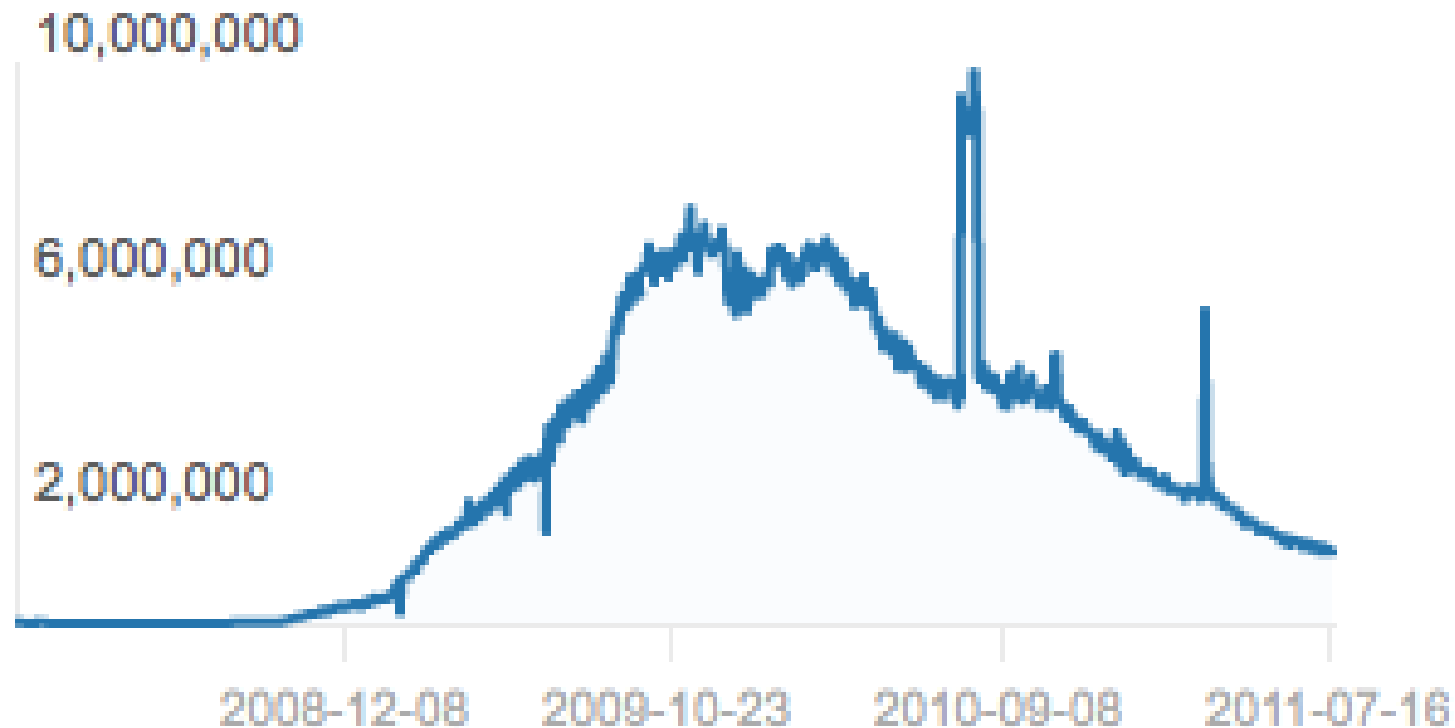
Requirements
5 1

DO THIS

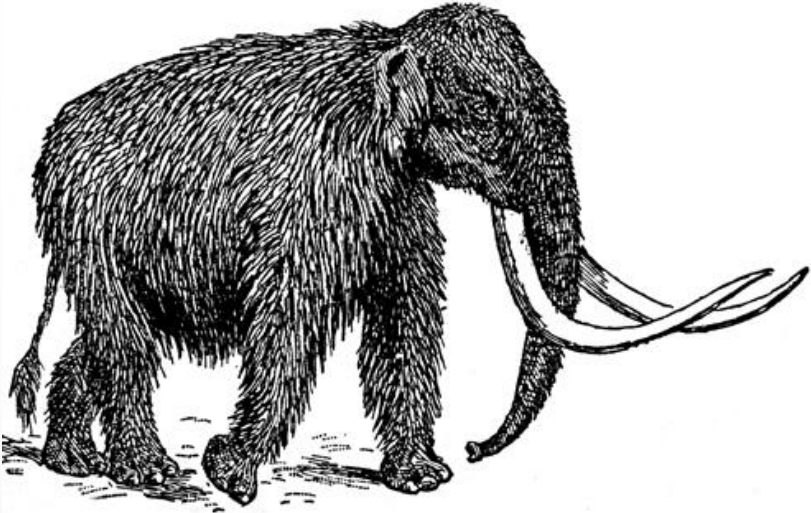
But...

Unique Active Users

View: **Daily** | Weekly | Monthly



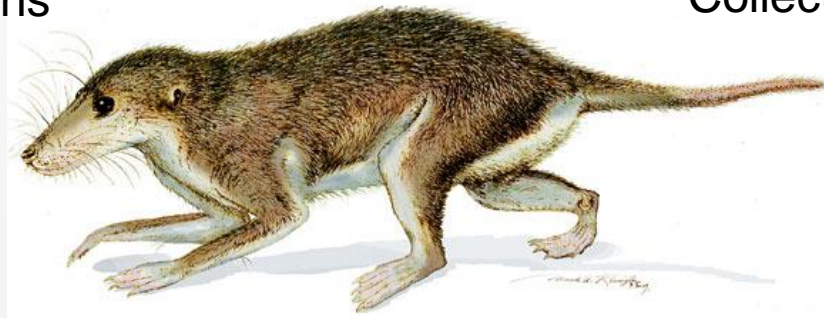
RPG's 2010-2011



Isometric Missions



Collectible Monsters



Light Dungeon Crawls

**NOTE: Drawings NOT to scale...
but animals are.**

Isometric Missions



Crime City – 1M Peak DAU



It Girl – 1.4M Peak DAU

Collectible Monsters



Monster Galaxy – 750K DAU



Miscrits –250K DAU



MinoMonsters – 65K DAU

Light Dungeon Crawlers



Deep Realms – 90K Peak DAU






Monster Hero – 50K Peak DAU



Hello Adventure – 12% DAU/MAU

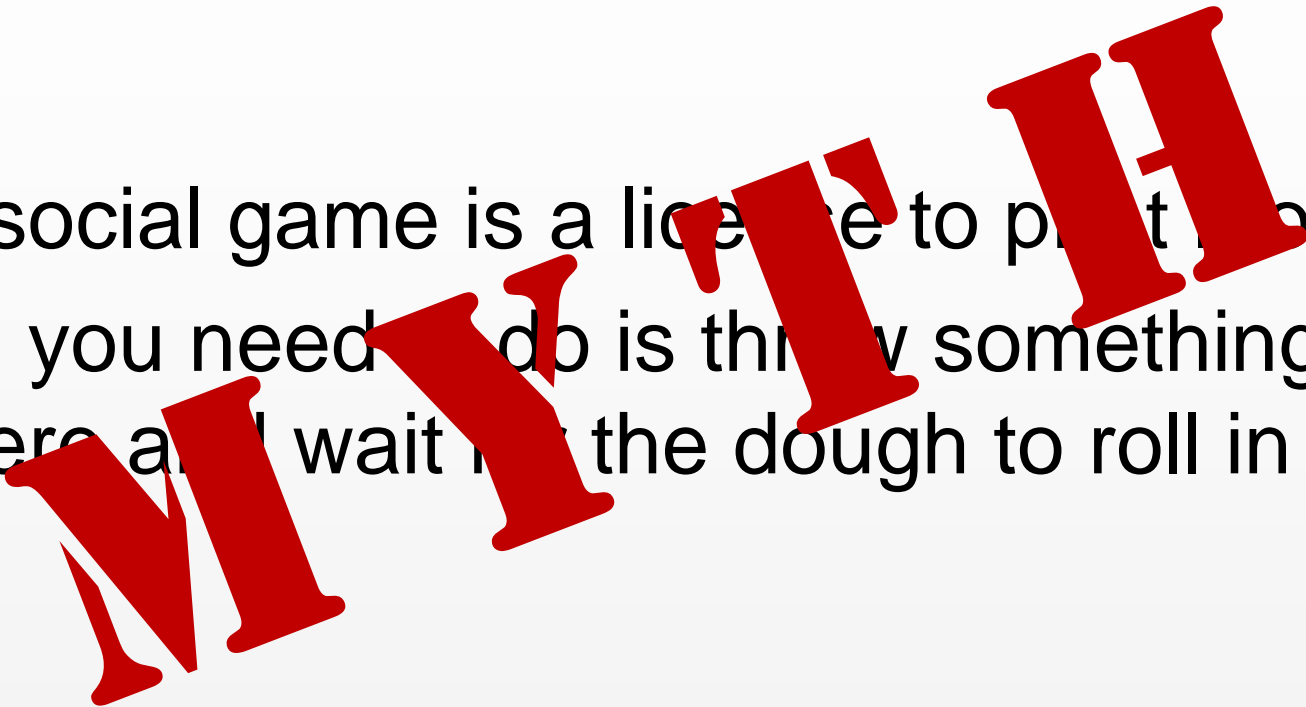
Looking Forward

- Healthy diversification
- Isometric Missions 
- Monster Collector 
- Dungeon Crawl 

Trend #10

**IT'S A HARD, HARD
ROAD**

- A social game is a license to print money
- All you need to do is throw something out there and wait for the dough to roll in

- 
- A social game is a license to print money
 - All you need to do is throw something out there and wait for the dough to roll in

PlayFirst



PlayFirst



PlayFirst



PlayFirst



Big Fish Games



Big Fish Games



Big Fish Games



Big Fish Games



Pogo



Pogo



Sony Online Entertainment



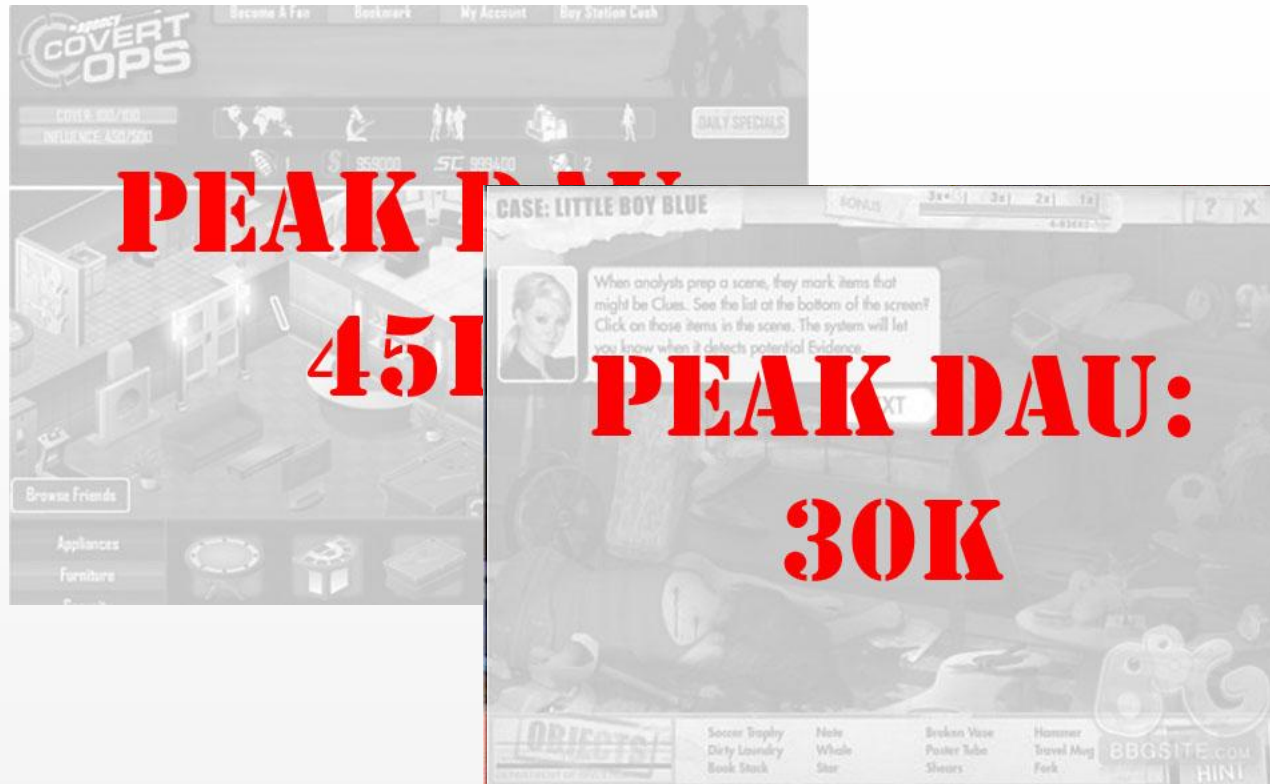
Sony Online Entertainment



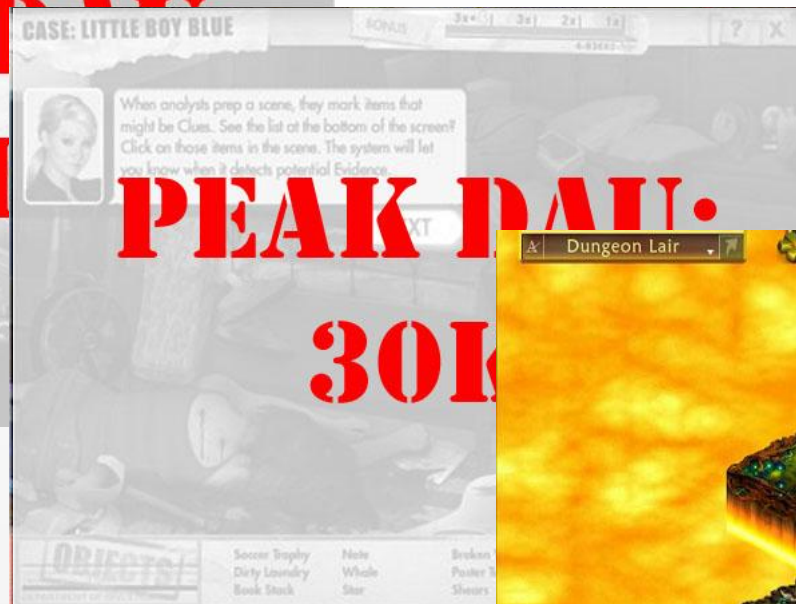
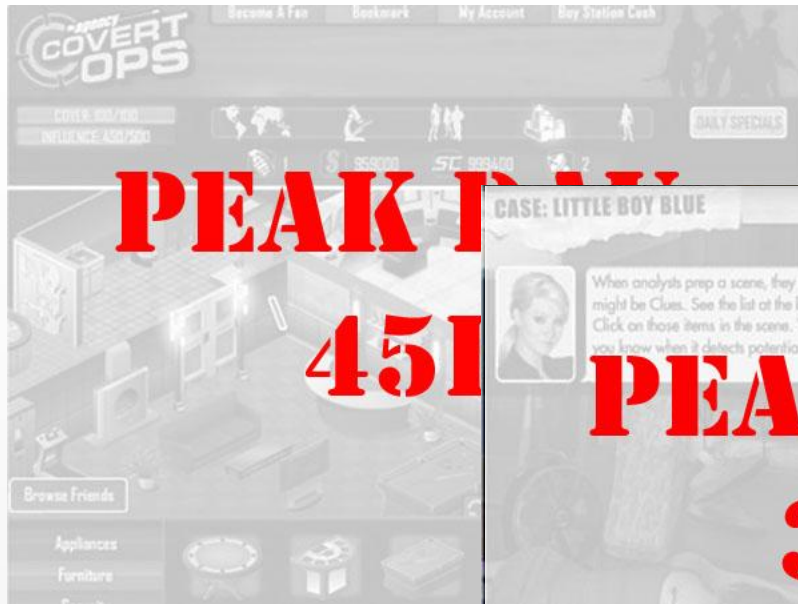
Sony Online Entertainment



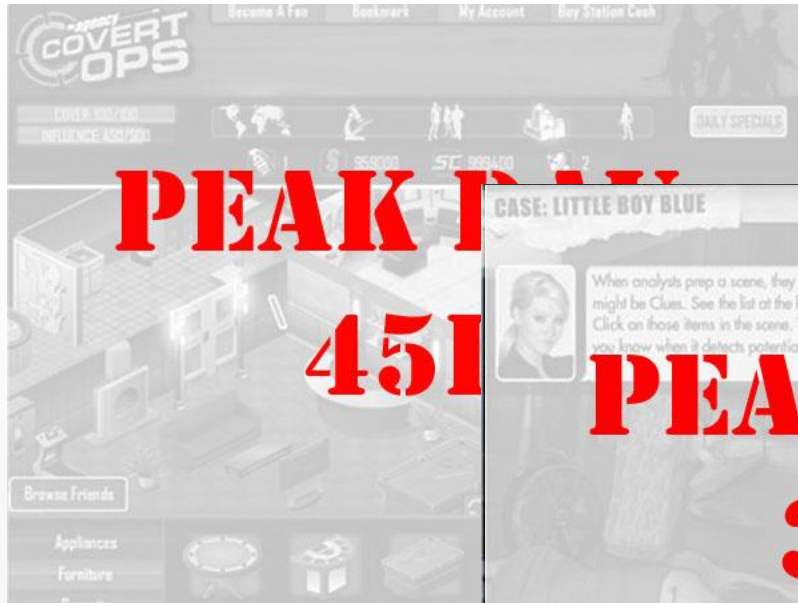
Sony Online Entertainment



Sony Online Entertainment



Sony Online Entertainment



Blue Fang



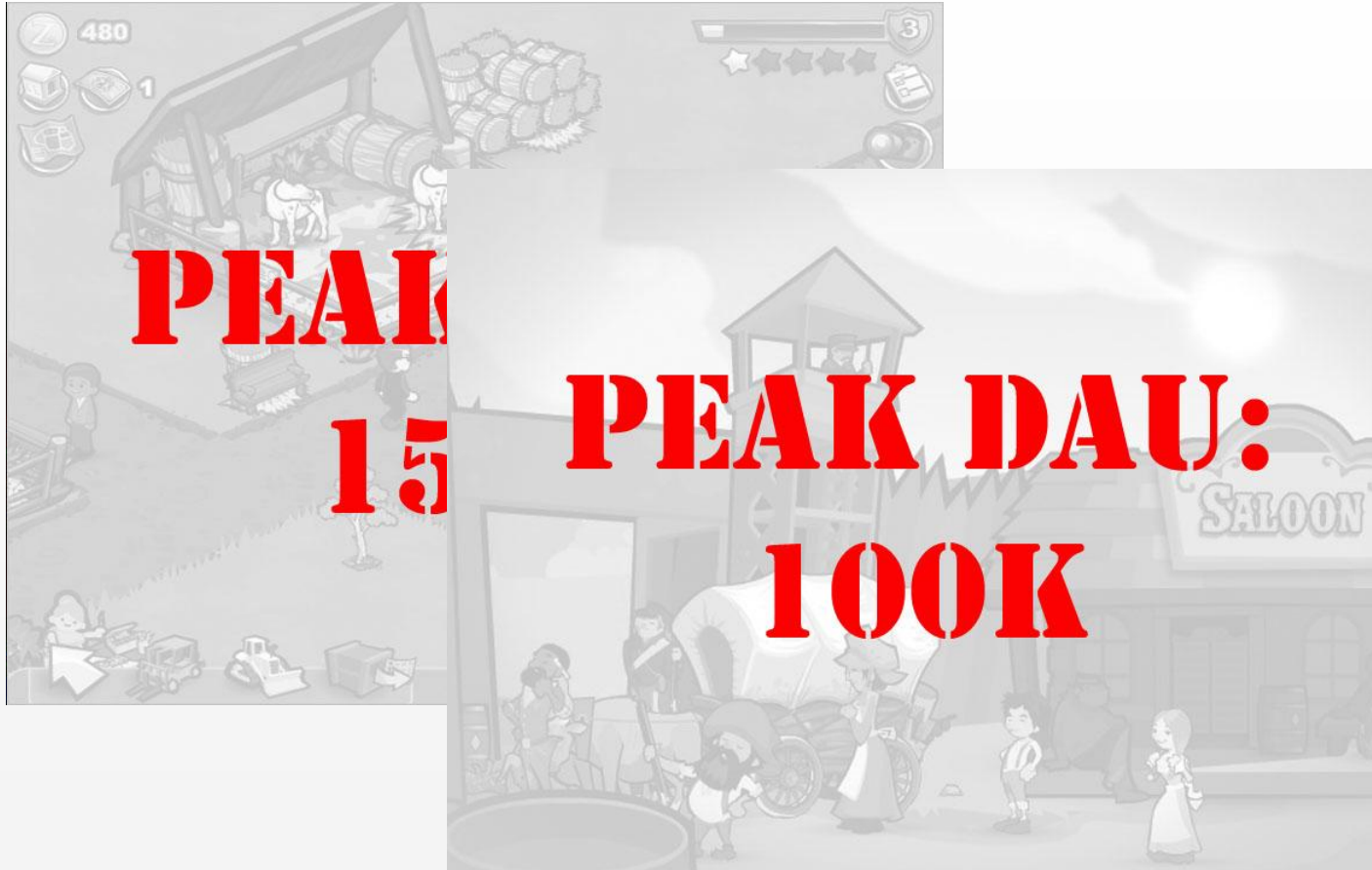
Blue Fang



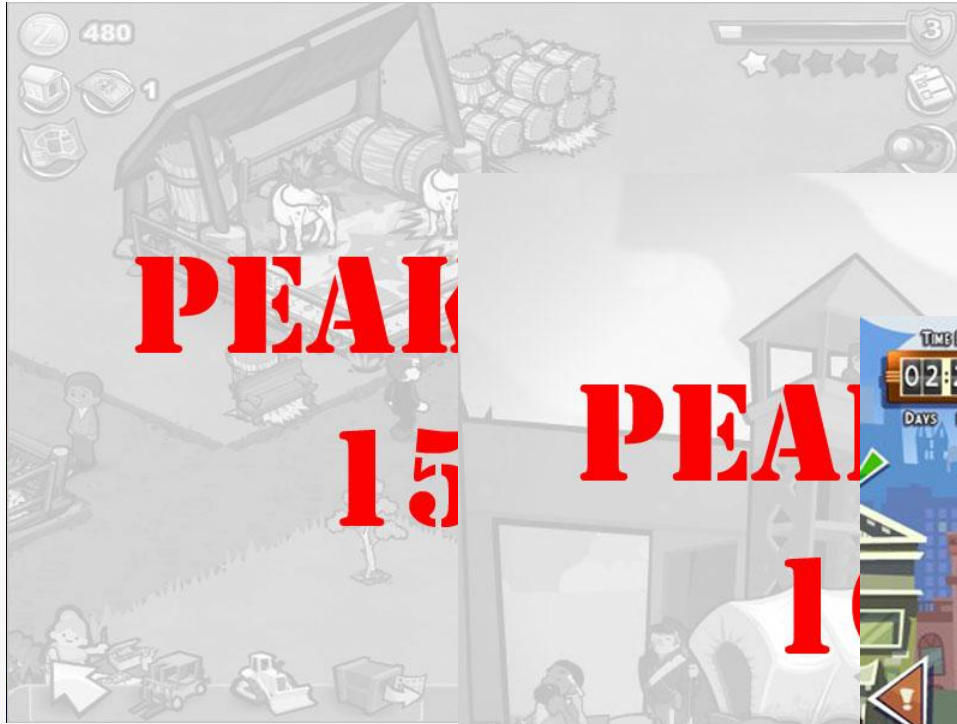
Blue Fang



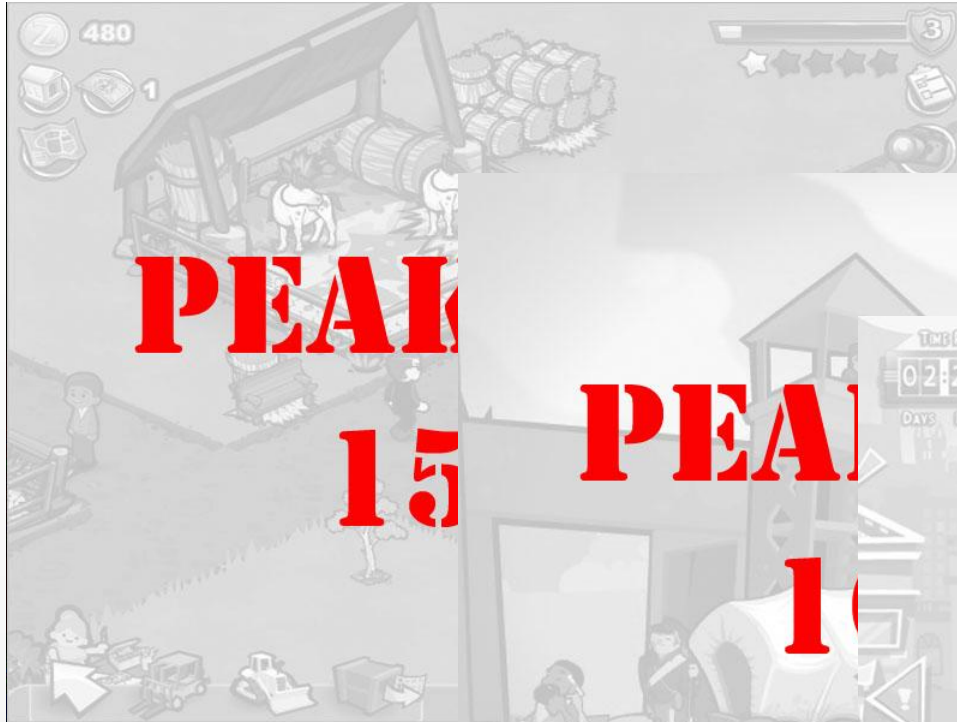
Blue Fang



Blue Fang



Blue Fang



Slide



Slide



Slide



Slide



Why?

- It's hard
- It's really hard
- It's really really hard
- It's really really #\$%()@&ing hard

THANK YOU



Appendix

Some notable 2010-2011 releases

(source:
www.developeranalytics.com)

New Releases	Release Date	Peak DAU (in millions)	Peak Date	Weeks to Peak	Current DAU* (in millions)	Developer
Cityville	12/4/2010	21.52	3/1/2011	14	13.50	Zynga
The Sims Social	8/10/2011	11.30	9/21/2011	6	10.38	EA
Empires & Allies	6/6/2011	7.76	6/15/2011	1	4.91	Zynga
Adventure World	9/11/2011	5.26	9/27/2011	2	3.70	Zynga
Pioneer Trail	8/16/2011	5.04	8/23/2011	1	2.23	Zynga
Gardens of Time	4/17/2011	4.04	8/10/2011	16	3.23	Playdom
Words With Friends	6/4/2011	3.91	n.a.	18 and counting	3.91	Zynga
Diamond Dash	3/18/2011	2.23	n.a.	28 and counting	2.23	wooga
Bubble Island	2/4/2010	2.05	n.a.	86 and counting	2.05	wooga
Zuma Blitz	12/9/2010	1.57	12/17/2010	1	0.74	Popcap
Tetris Battle	8/5/2010	1.54	n.a.	60 and counting	1.54	Tetris Online
Monster Galaxy	12/1/2010	1.51	6/18/2011	28	0.22	Gaia Online
Zombie Lane	3/17/2011	1.47	6/6/2011	12	0.58	Digital Choc
It Girl	9/16/2010	1.44	2/12/2011	21	0.42	Crowdstar
Slotomania	12/25/2010	1.44	9/27/2011	39	1.40	Playtika
Smurfs & Co.	8/12/2011	1.43	9/6/2011	4	0.98	Ubisoft
Bubble Saga	4/21/2011	1.33	7/20/2011	13	1.20	King
Ravenwood Fair	10/22/2010	1.27	3/5/2011	19	0.59	LOLapps
Crime City	9/16/2010	1.03	1/30/2011	19	0.25	Funzio
DoubleDown Casino	6/26/2011	1.02	n.a.	14 and counting	1.02	DoubleDown Interactive
Monopoly Millionaires	2/2/2011	0.87	4/13/2011	10	0.16	Playfish
Social Empires	1/7/2011	0.83	9/7/2011	35	0.56	Social Point
Army Attack	5/25/2011	0.70	6/15/2011	3	0.33	Digital Choc
Mahjong Saga	7/9/2011	0.65	9/8/2011	9	0.53	King
Bingo Blitz	11/4/2010	0.63	n.a.	47 and counting	0.63	Buffalo
Mystery Manor	3/17/2011	0.60	9/10/2011	25	0.45	Game Insight
Happy Hospital	11/12/2010	0.57	7/20/2011	36	0.40	wooga
Dragons of Atlantis	10/8/2010	0.53	6/15/2011	36	0.38	Kabam
Gnome Town	8/14/2011	0.53	9/14/2011	4	0.41	Playdom
ESPN College Town	10/1/2010	0.45	11/9/2011	6	0.03	Playdom
CSI: Crime City	10/20/2010	0.42	1/4/2011	11	0.27	Ubisoft
JackpotJoy Slots	7/5/2011	0.34	n.a.	12 and counting	0.34	iwi
Madden NFL Superstars	9/4/2010	0.33	2/7/2011	22	0.12	Playfish
Diner Dash	2/12/2011	0.24	4/25/2011	10	0.00	Playfirst
Collapse! Blast	7/30/2011	0.22	n.a.	9 and counting	0.22	GameHouse
Puzzle Saga	11/18/2010	0.20	9/7/2011	42	0.19	King
Bubble Atlantis	9/7/2011	0.17	n.a.	3 and counting	0.17	MindJolt
ESPN Sports Bar & Grill	7/5/2011	0.12	8/30/2011	8	0.11	Playdom
Catch a Killer	12/20/2010	0.11	???	???	0.00	SOE
Oregon Trail	2/7/2011	0.10	2/21/2011	2	0.00	Blue Fang
Deep Realms	3/31/2011	0.09	5/29/2011	8	0.03	Playdom
Monster Hero	3/23/2011	0.05	4/22/2011	4	0.01	Phoenix Age
Carmen Sandiego	2/17/2011	0.04	2/25/2011	1	0.00	Blue Fang
Dungeon Overlord	1/12/2011	0.02	3/12/2011	8	0.01	Night Owl

* as of 10/1/2011