



# The Year in Free-to-Play Games

## Part 1: Social/Mobile

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GAME DEVELOPERS CONFERENCE®

MOSCONE CENTER · SAN FRANCISCO, CA

MARCH 2-6, 2015 · EXPO: MARCH 4-6, 2015



# The Usual...

- Mute your phones
- Fill out your surveys



# The Year in Casual Games



~~The Year in Casual Games~~

The Year in Social Games





~~The Year in Casual Games~~

~~The Year in Social Games~~

The Year in Free-to-Play Games



# The Year in Free-to-Play Games, Part 1



# The Year in Free-to-Play Games, Part 2



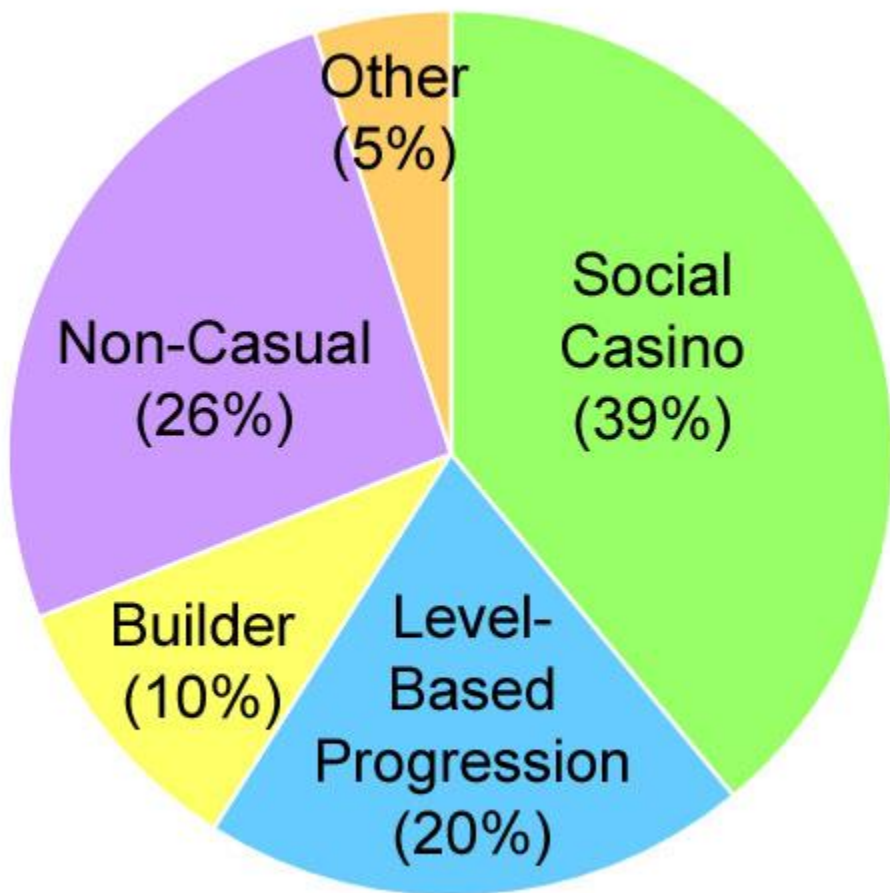


# Top Grossing Apps - as of 2/20/2015

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25	Stormfall: Age of War	Minecraft	War of Nations	DoubleDown Casino

Social Casino	Level-Based Progression	Builders	Non-Casual
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# Top-Grossing Social/Mobile Games - Feb. 2015



Top 25 grossing games on each of Facebook, iPhone, iPad, and Android. Sources: Facebook, App Annie



# **1. Social Casino**



# Item One: Growth





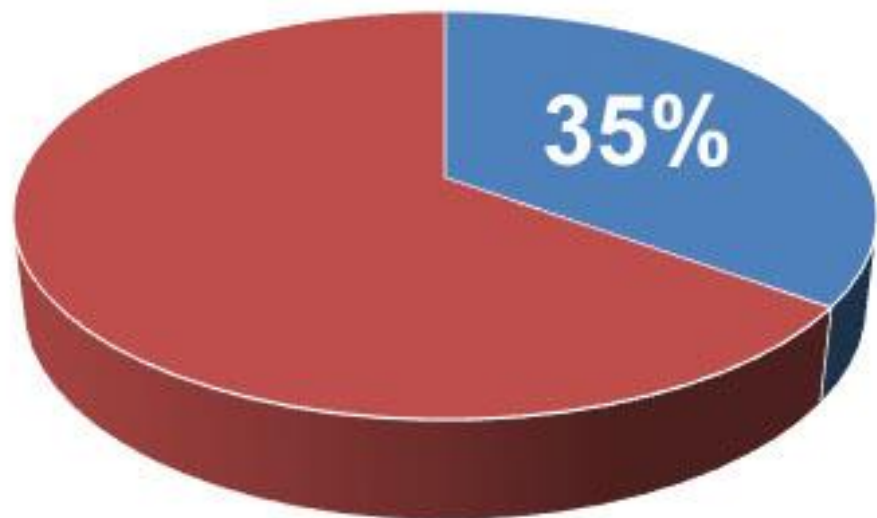
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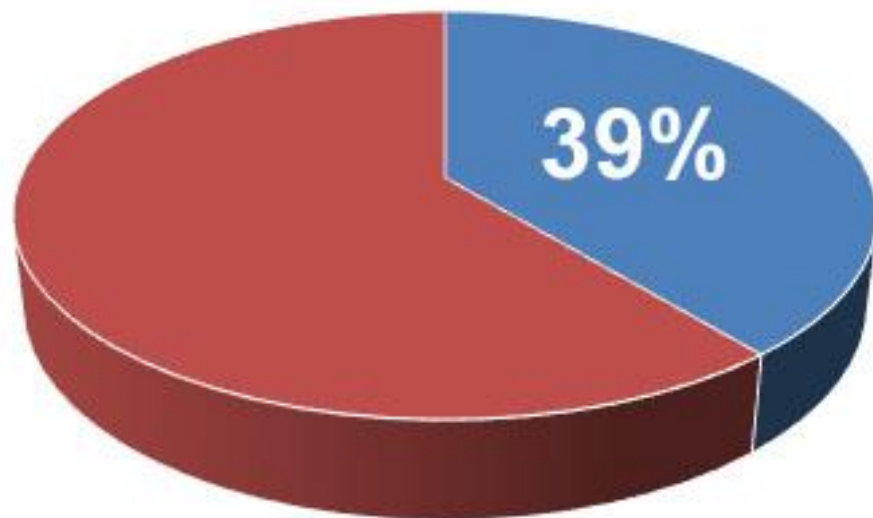


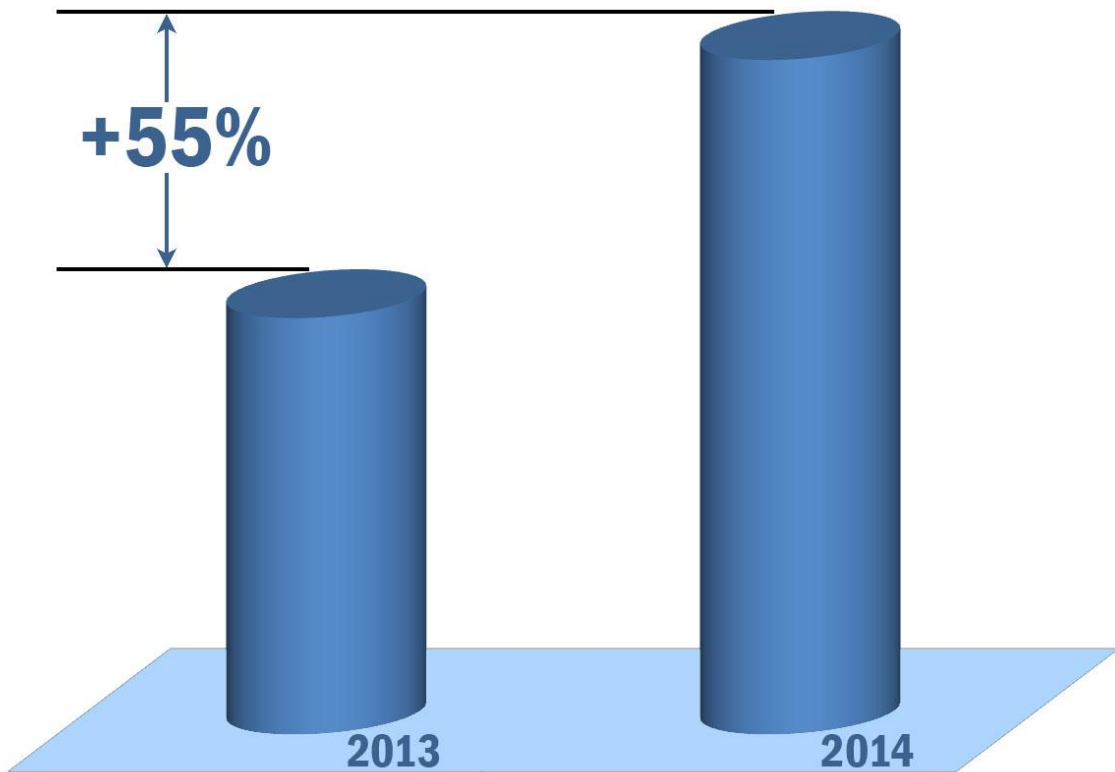
# Percent of Top-Grossing Apps in the Social Casino Category

Feb. 2014



Feb. 2015





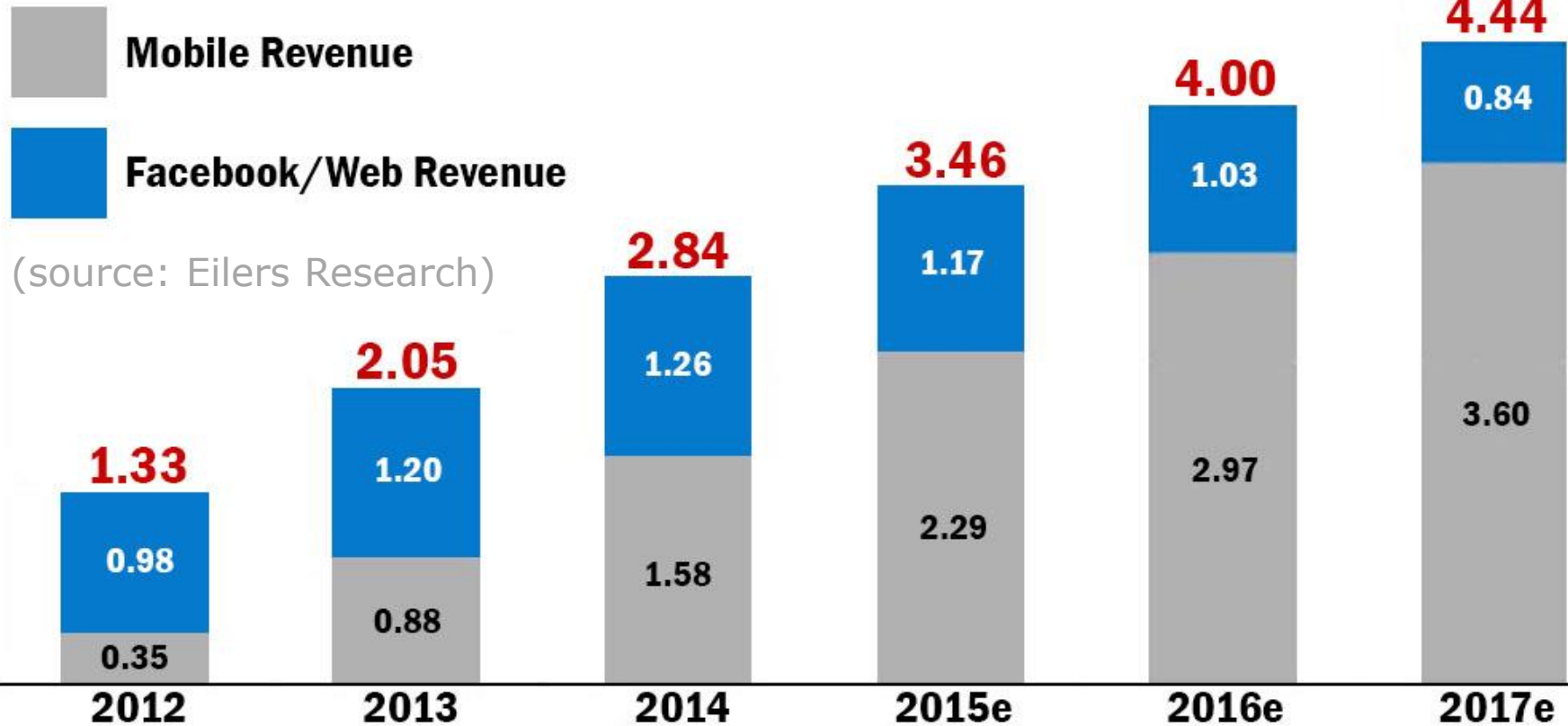
- Social casino revenue on iOS grew 55%

(Nov 2013 → Nov 2014)

(Source: App Annie)

# Social Casino Market Size

## 2012 through 2017 (estimate) (in billions)





# Item Two: Stability





## iPad Top-Grossing, Social Casino

2013



2014







## iPad Top Grossing, Casino

2013



2014



## iPhone Top-Grossing, Social Casino

2013



2014





# Item Three: **IP-Driven**





# Non-Casino IP





# Non-Casino IP



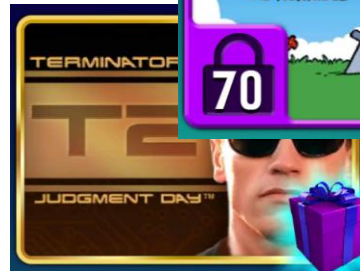
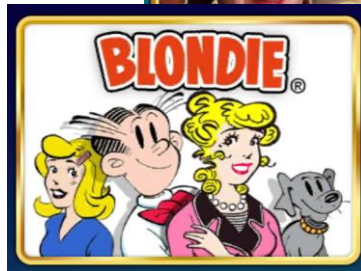
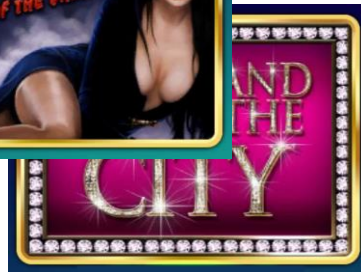


# Non-Casino IP





# Non-Casino IP







# What's the Value?





# Casino IP

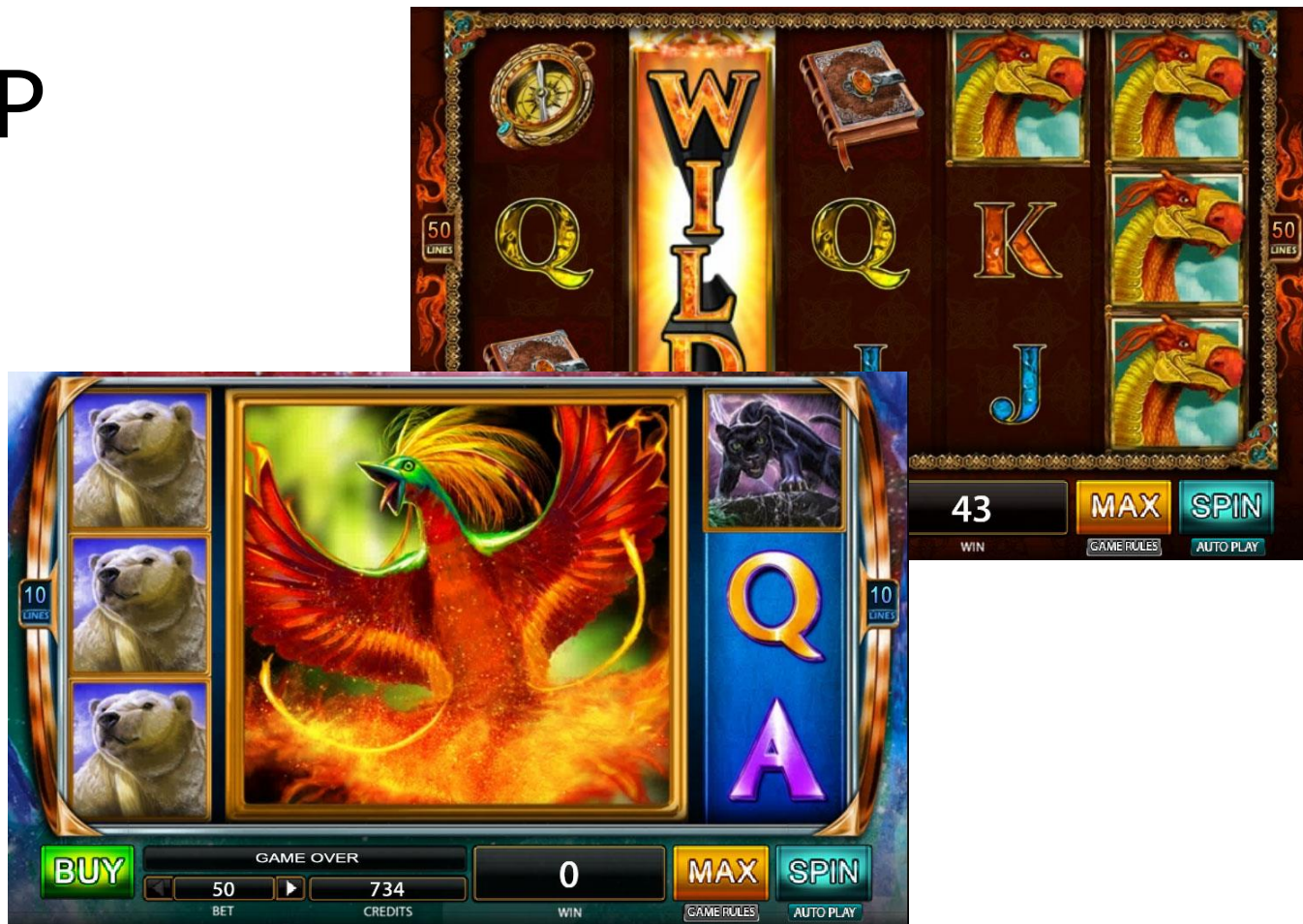


# Casino IP





# Casino IP







# Casino IP







# Item Four: Consolidation





+



**Feb. 2014 - \$90 million**





**Feb. 2014 - \$165 million**



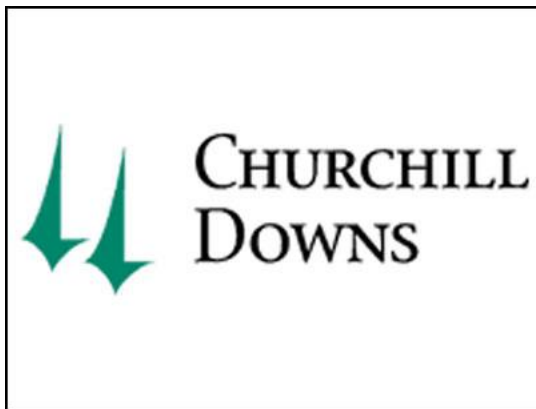


+



**June 2014 - \$100 million**





+



**Nov. 2014 - \$885 million**





# Parent Companies, Too!



+



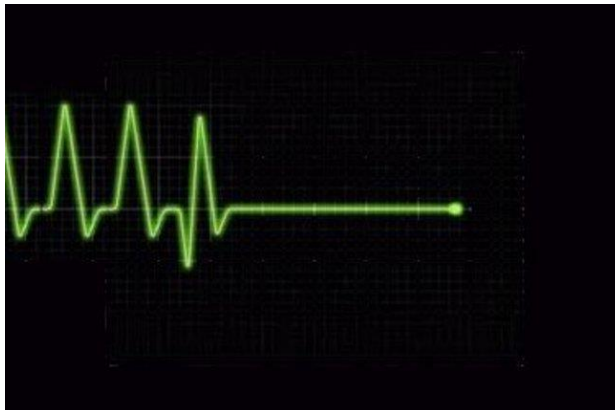
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# Why Now?





# Today's Lineup

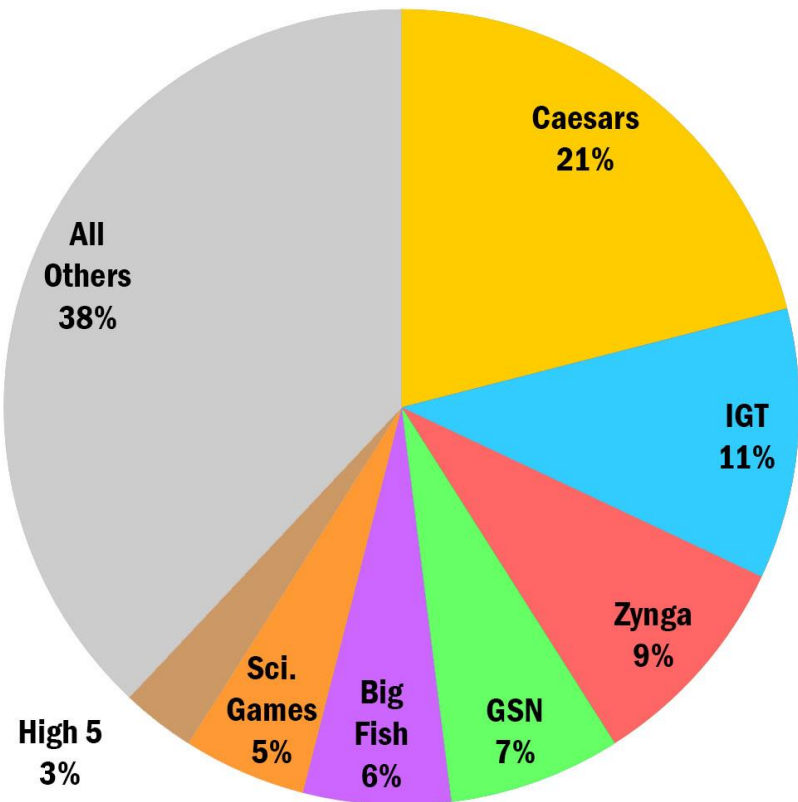






# Social Casino Market Share

Q2 2014 – Social Casino Revenue Only – Source: Eilers Research





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Q2 2014 – Social Casino Revenue Only – Source: Eilers Research



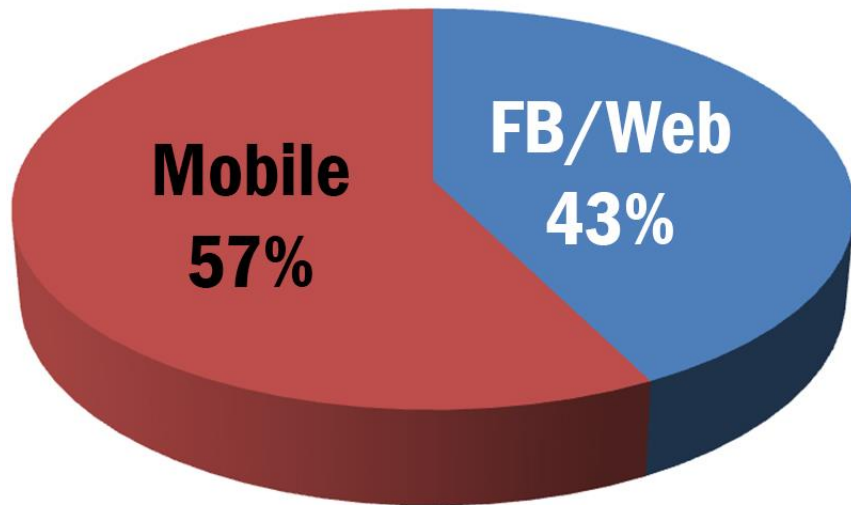
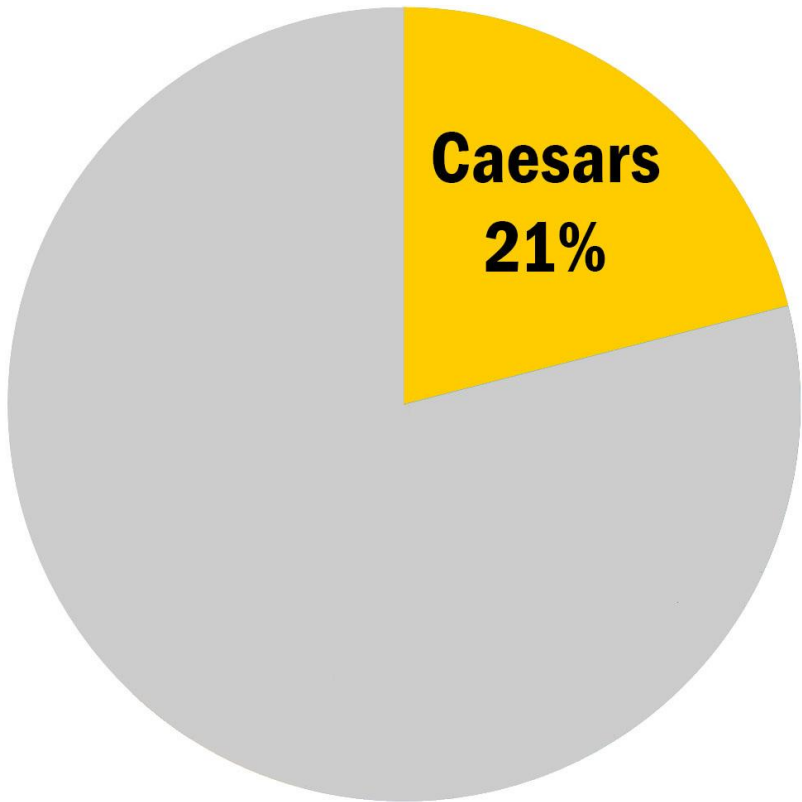
**Caesars**  
**21%**





# Social Casino Market Share

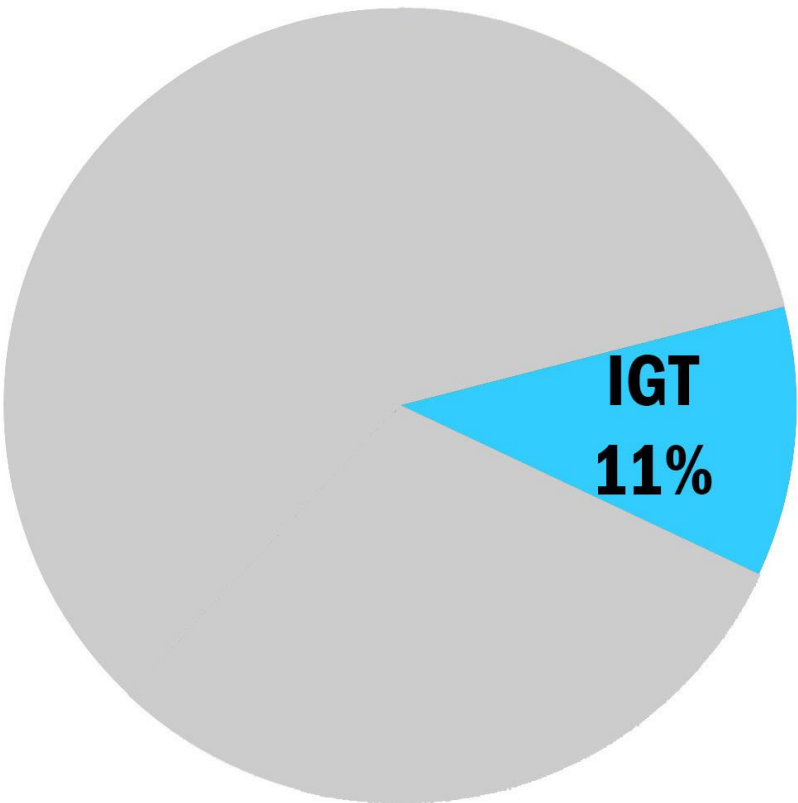
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Q2 2014 – Social Casino Revenue Only – Source: Eilers Research

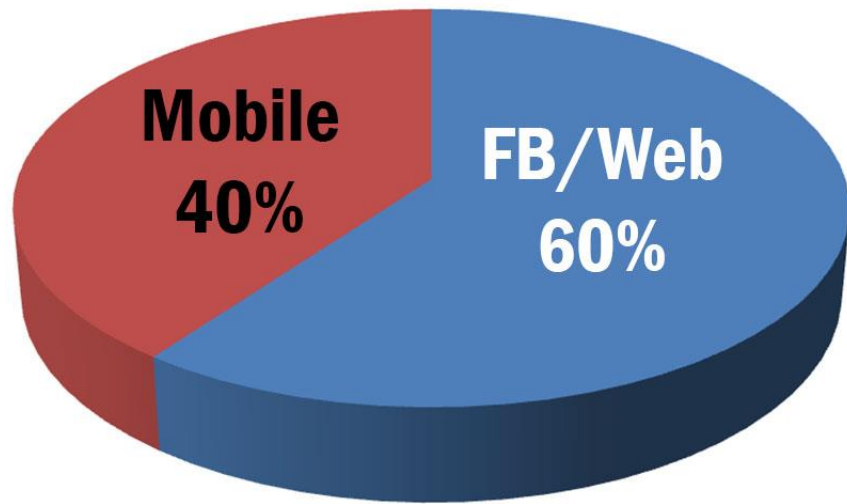
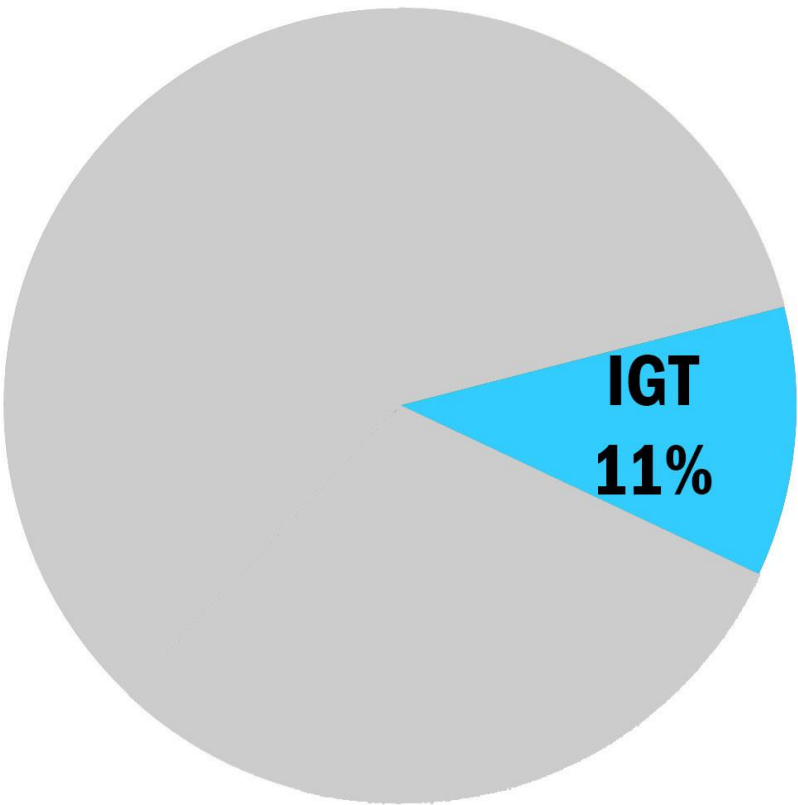






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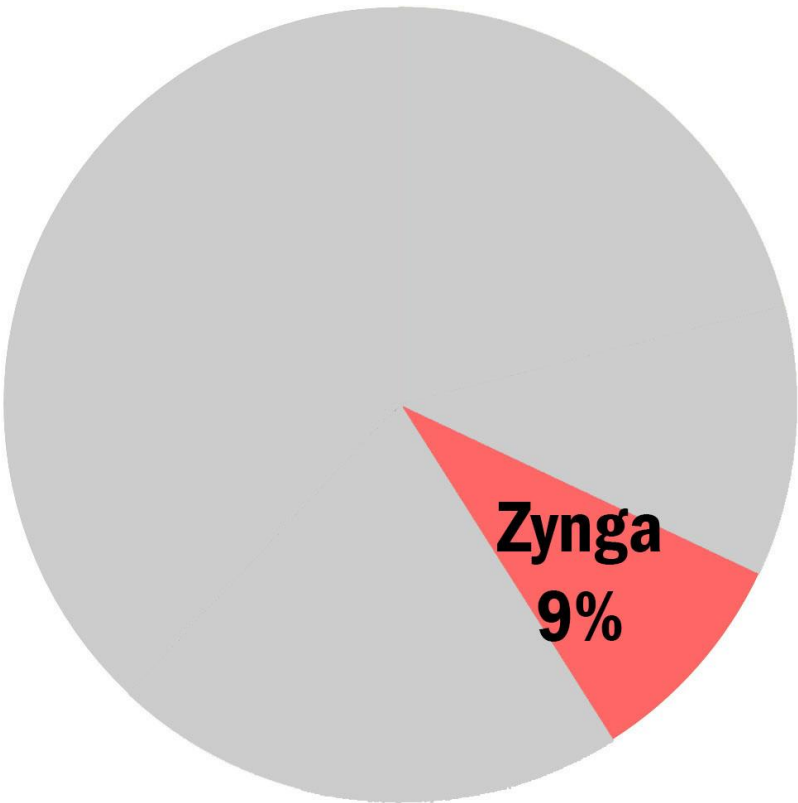
Q2 2014 – Social Casino Revenue Only – Source: Eilers Research





# Social Casino Market Share

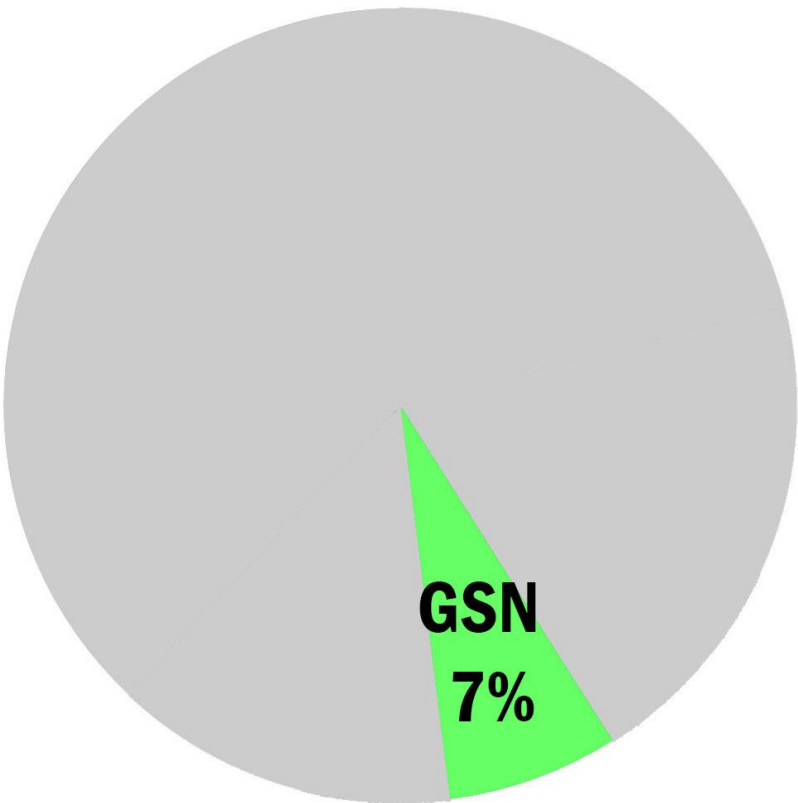
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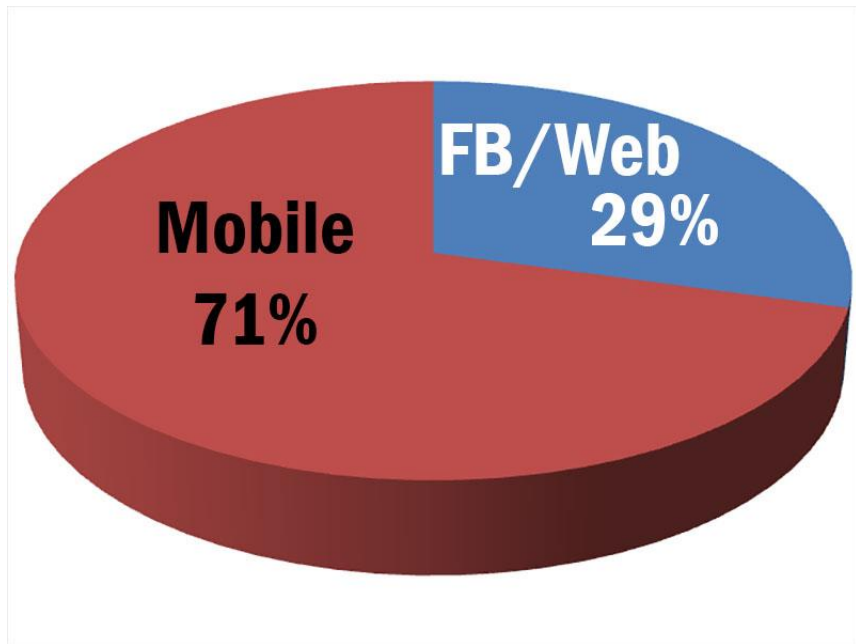
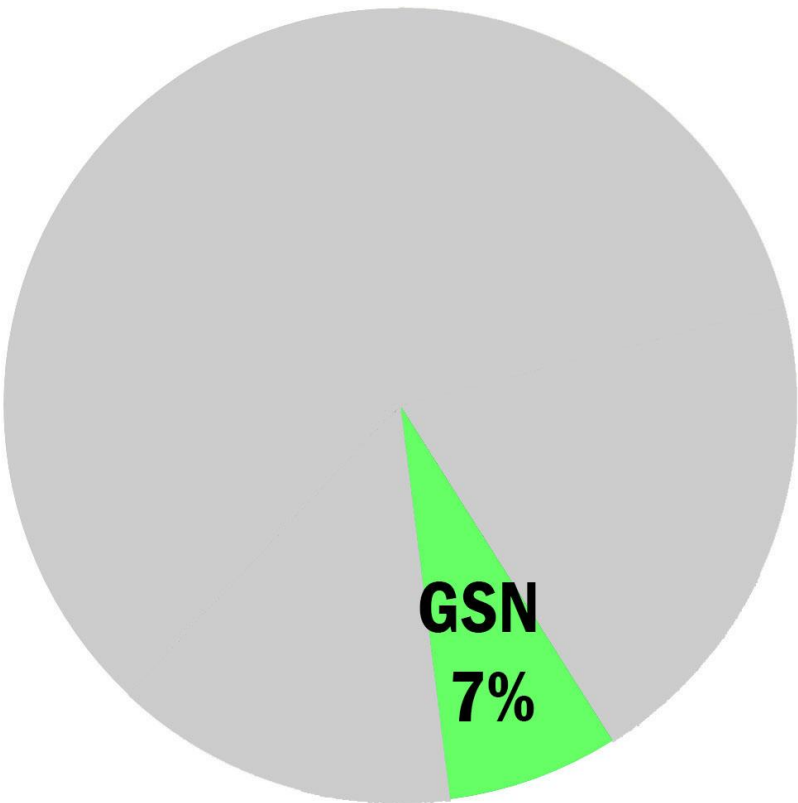
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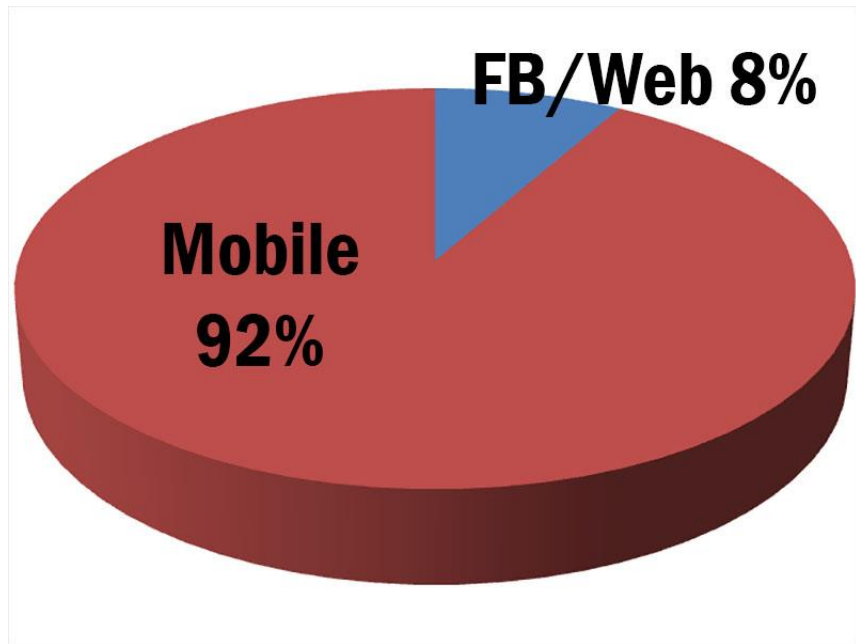
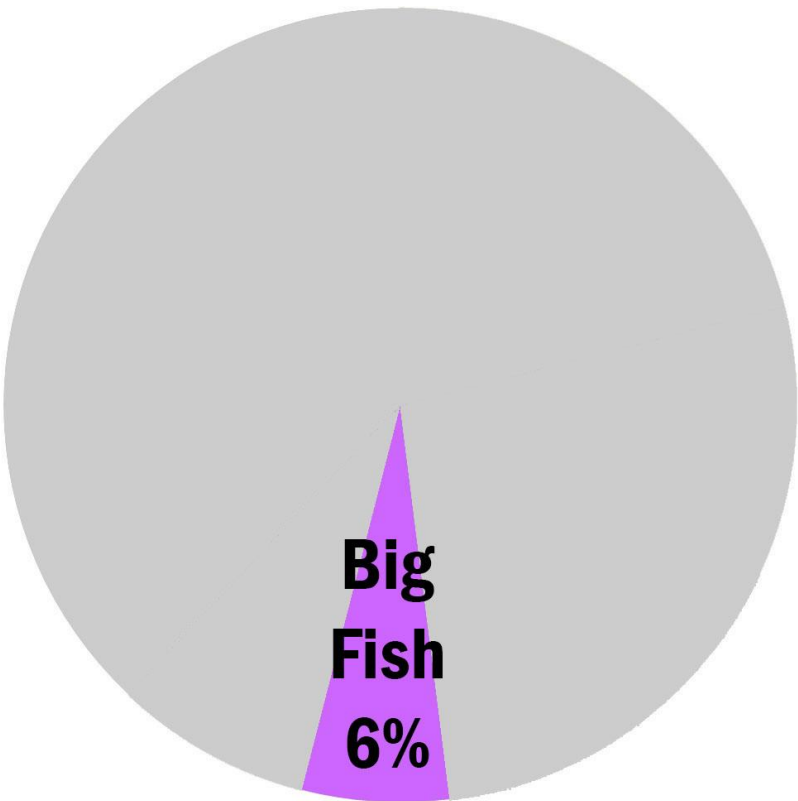


**Big  
Fish  
6%**



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Q2 2014 – Social Casino Revenue Only – Source: Eilers Research





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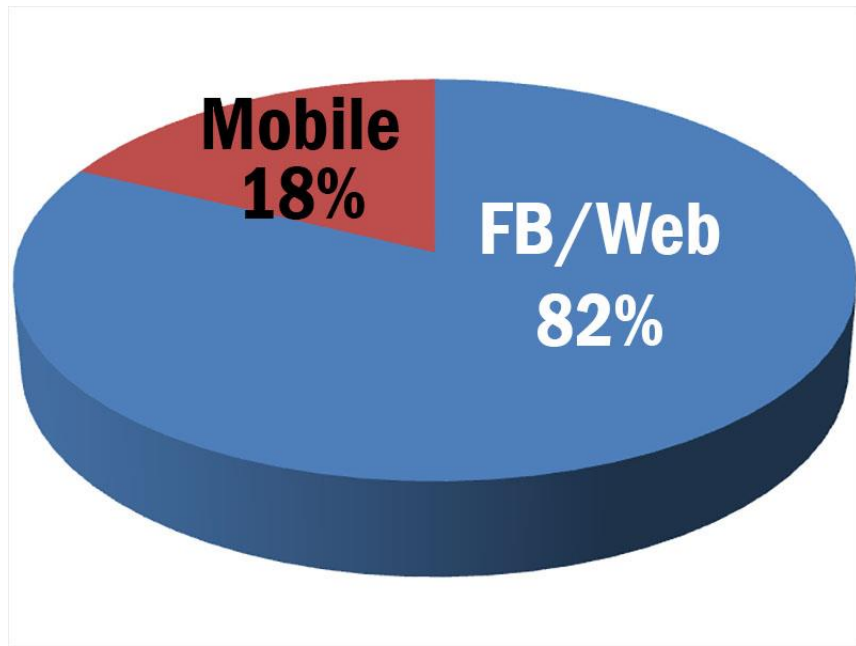
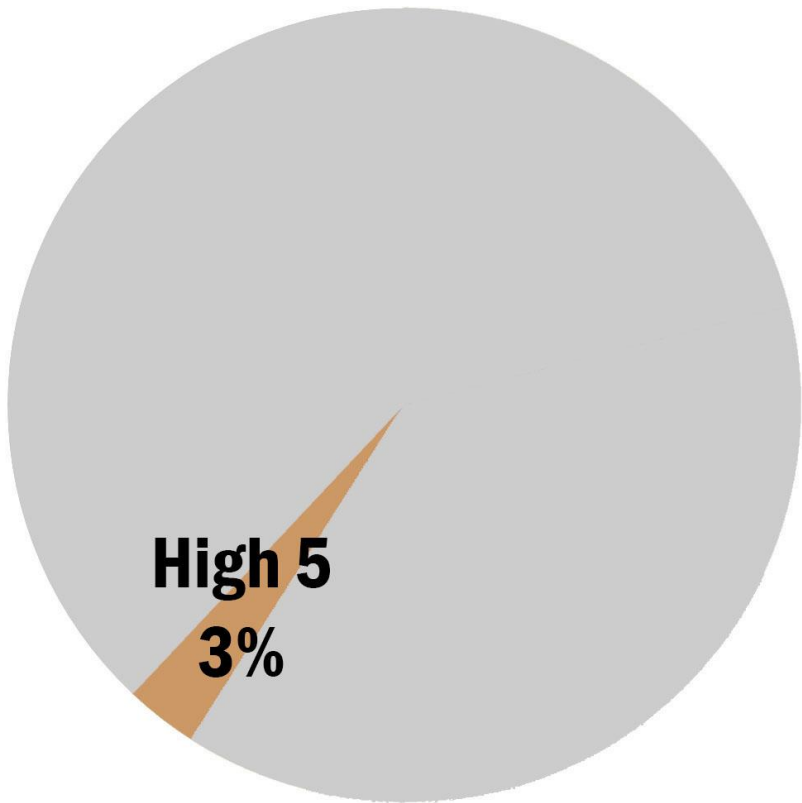


**Scientific  
Games  
5%**



# Social Casino Market Share

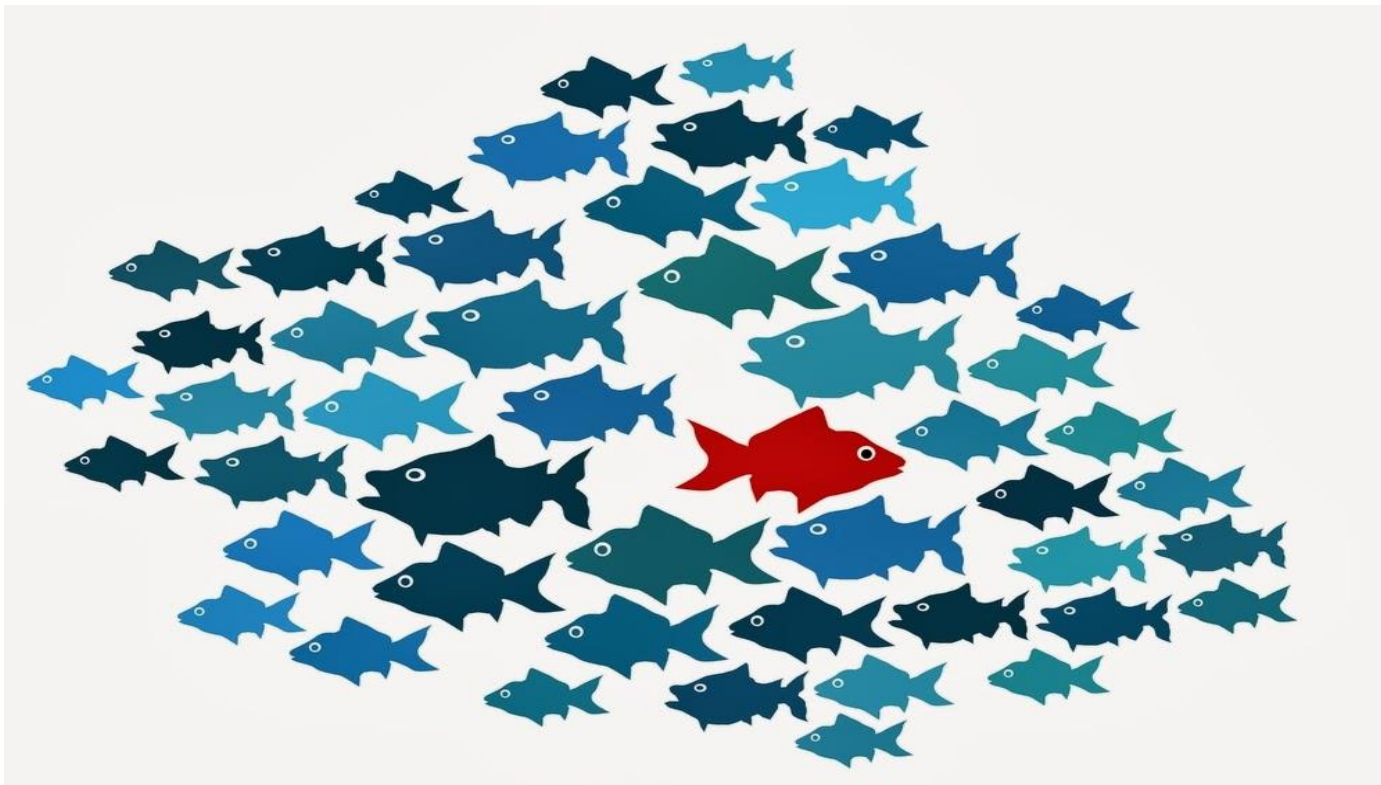
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# Item Five: **Innovation**





# Jackpot Dreams - spinner

SEDUCTION OF  
WHITE PEONY

YOU REACHED  
**GAME LEVEL 3!**



COLLECT



# GSN Grand Casino - environment





FREE CHIPS  
READY



CARDS

WHEELS  
WILD



777

SLOTS



HIGH  
ROLLERS  
COMING SOON

1  
6  
3

BINGO



MONI  
BINGO

CASINO



# Shake the Sky – Asian content



The background features a repeating pattern of stylized Chinese clouds in a light gold color. Large, stylized blue clouds with gold outlines are positioned at the corners and along the sides of the frame. A central red square contains the main title in white Chinese characters.

嗨翻天

A large, stylized gold cloud with intricate swirling patterns is positioned below the red square, partially overlapping the English text.

SHAKE THE SKY



嗨翻天 SHAKE  
THE SKY

SALE!

\$978,100



4



SPLIT SYMBOLS WITH 243 WAYS TO  
WIN

MIN BET: 125,000

# Night Jasmine





# myVEGAS - new genre exploration



Back

7

31,037

1,310

25,217

BUY



BLACKJACK PAYS 3 TO 2  
DEALER MUST HIT SOFT 17  
WELCOME TO EXCALIBUR HOTEL + CASINO + LAS VEGAS



21



21



19

FAST

CLEAR BETS

BET 2X

BET





# Predictions





# 1. Increased focus outside N.A.



Data: University of Nevada, Las Vegas; Gaming Inspection & Coordination Bureau



## 2. UA costs will rise sharply





# 3. Increasing mobile domination



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### 3. Increasing mobile domination

- As platforms (and their player base) age, will social casino players stick longer?
- This is a 5-years-out prediction.



## **2. Mobile Midcore**



# Item One:

## When Is a Card Not a Card?





# Once Upon a Time







# There Was A Card Game



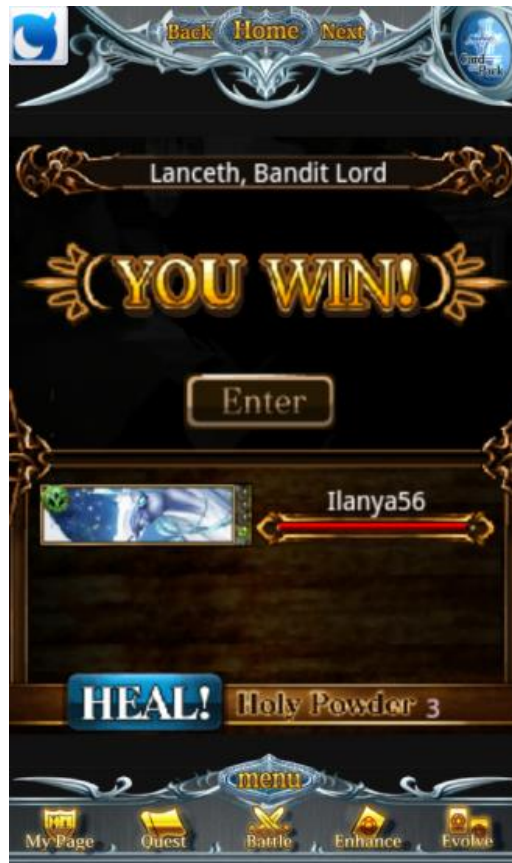


# It Made Many Game Designers Sad





# Because It Had No Gameplay





# But It Made Many Players Happy To Part With Money





# Which Made Game Executives Very Happy







# Its Revenues Are Gone But It Lives On Through Its Descendants



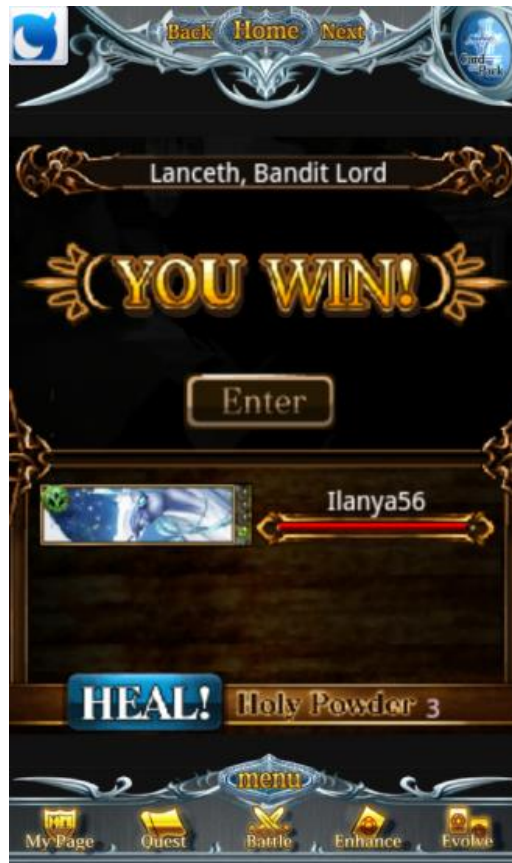


# Card Battle Games

- Piloted by Rage of Bahamut
  - Launched in 2012
- Several key design characteristics



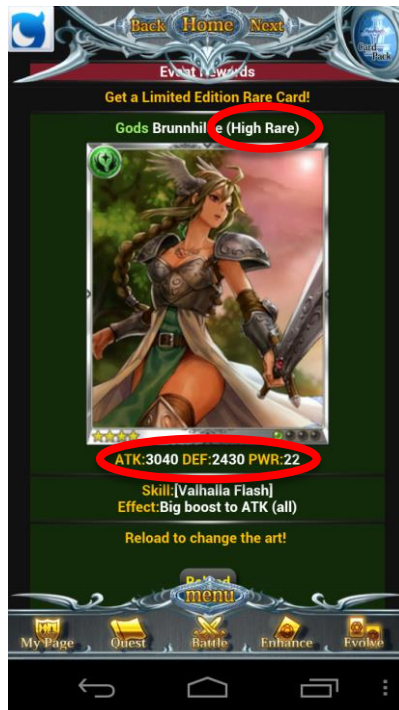
# Very Lightweight Gameplay





# Deep, Novel Metagame

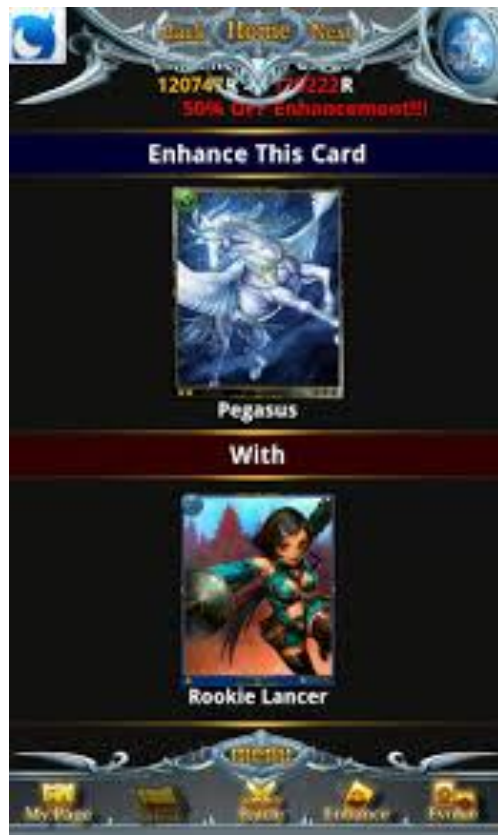
- Redefining how cards work





# Going Further With Cards

- Enhancing











# Going Further With Cards

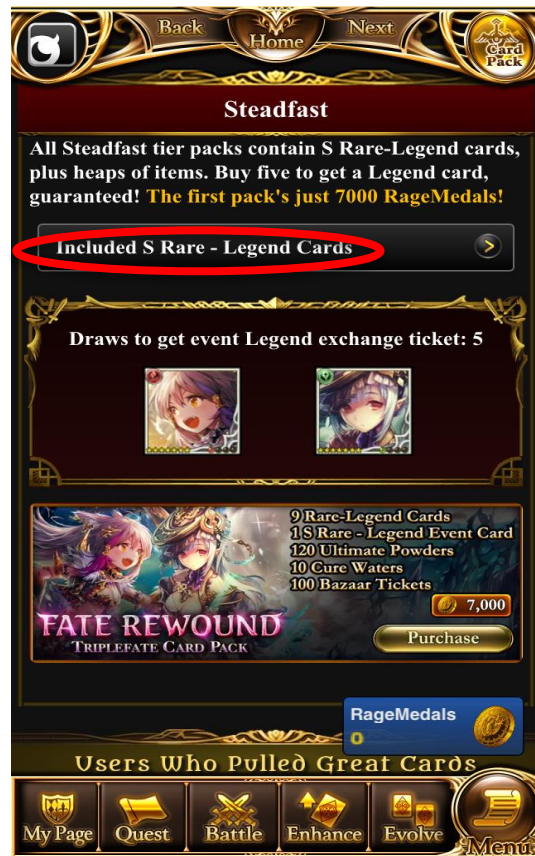
- Evolving

<div><div>Gods Archangel</div><div>Rarity: High Normal</div><div></div><div>★★</div><div>ATK: 1340 DEF: 1090 Max: {{{maxatk}}} MAX: {{{maxdef}}} PWR Required: 12</div><div>Skill: Angelic Arrow Effect: Small hit to foe's human DEF</div><div>Do not confuse me with the lower angels. I have a vital role: to spread the word of God to the people. Stay out of my way.</div><div>Sells for: 3,100</div></div>	<div><div>Gods Archangel+</div><div>Rarity: High Normal</div><div></div><div>★★</div><div>ATK: 1640 DEF: 1305 PWR Required: 12</div><div>Skill: Angelic Arrow Effect: Small hit to foe's human DEF</div><div>Do not confuse me with the lower angels. I must serve as God's voice, as God's body. I do not welcome interference.</div><div>Sells for: 4,850</div></div>	<div><div>Gods Archangel++</div><div>Rarity: High Normal</div><div></div><div>★★</div><div>ATK: 2156 DEF: 1525 PWR Required: 12</div><div>Skill: Angelic Arrow Effect: Small hit to foe's human DEF</div><div>Do not confuse me with the lower angels, as if you could comprehend the importance of my duty. Know your place.</div><div>Sells for: 8,200</div></div>	<div><div>Gods [Holy Light] Archangel</div><div>Rarity: Rare</div><div></div><div>★★★</div><div>ATK: 2772 DEF: 1902 PWR Required: 12</div><div>Skill: Angelic Arrow Effect: Small hit to foe's human DEF</div><div>Do not confuse me with the lower angels. My task is to protect the weakest of lambs, to crush those who wage evil.</div><div>Sells for: 9,300</div></div>
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# Going Further With Cards

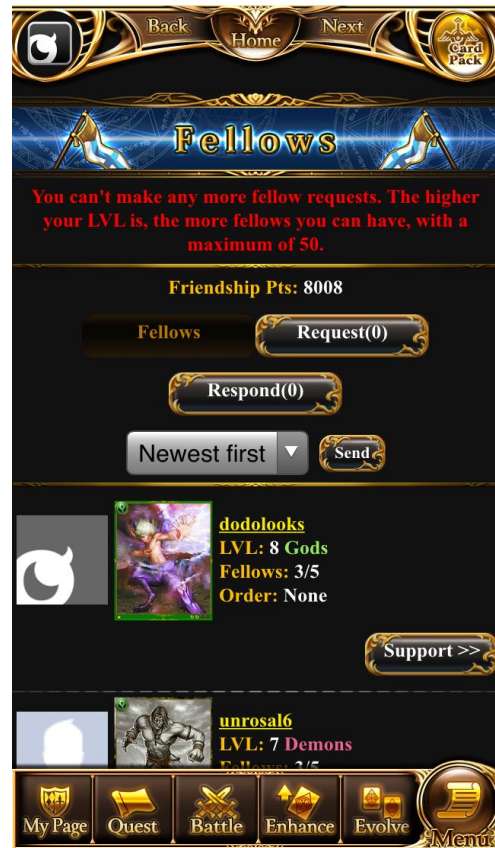
- Multiple Booster Types





# Going Further With Cards

- Card Borrowing as Social Networking





# End Results

- Minimal Gameplay, Maximal Revenue
- 6 months of top 5 Grossing US iPhone
- 9 months of #1 Grossing US Android
- Even bigger results in Asia
- Peak revenues \$2.6M/month, \$1 ARPDau<sup>1</sup>

<sup>1</sup> PocketGamer.biz, 6/29/2012,



# Many Happy Clones

- Legend of Cryptids
- Star Wars Force Collection
- Marvel War of Heroes
- Blood Brothers
- Defenders of Texel
- Dark Summoner
- Heroes of Camelot
- WWE SuperCard
- NBA All Net
- X-Men Battle of the Atom





# But Where Are They Now?

#	Grossing
94	<b>STAR WARS FORCE COLLE...</b> KONAMI  2



# So Why Bother?

- New wave of games has appropriated the CBG metagame and added
- 
- 
- 
- ACTUAL GAMEPLAY!!!!
- <pause for gasps>



# Current Examples

- Heroes Charge (#28 Grossing)
- Summoner Wars (#42 Grossing)
- Brave Frontier (#71 Grossing)
- Puzzle & Dragons (#79 Grossing)



# The Common Thread

- CBG metagame, substituting for cards
  - Enhancing
  - Evolving
  - Multiple tiers of random packs
  - Social borrowing
- Driving significant revenue



- Simple Timing Brawler







# Summoners War

- JRPG



# Brave Frontier

- JRPG + Light Builder





# Puzzle & Dragons

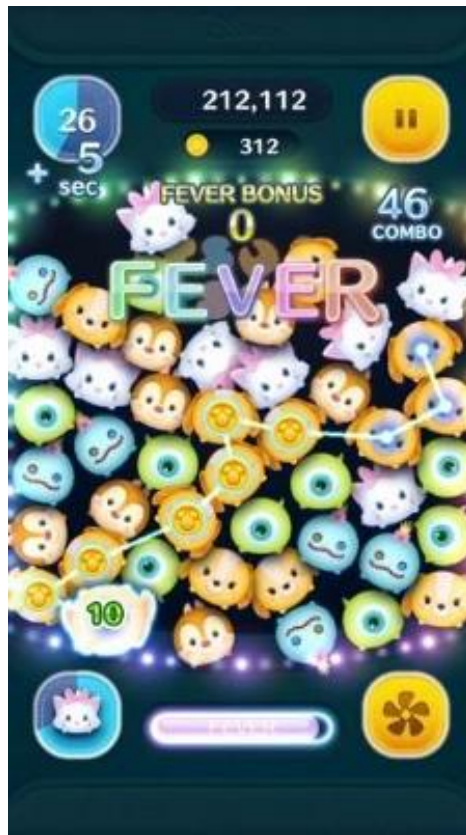
- First of the new wave
- Action Puzzle Gameplay







# Insane Asian Games





# Takeaways

- It's too late to make a CBG, **BUT**
- CBG metagame is now everywhere
  - Proven progression framework
- Underlying gameplay highly variable
- Expect many more high performers





# Item Two: **Still Dead?**





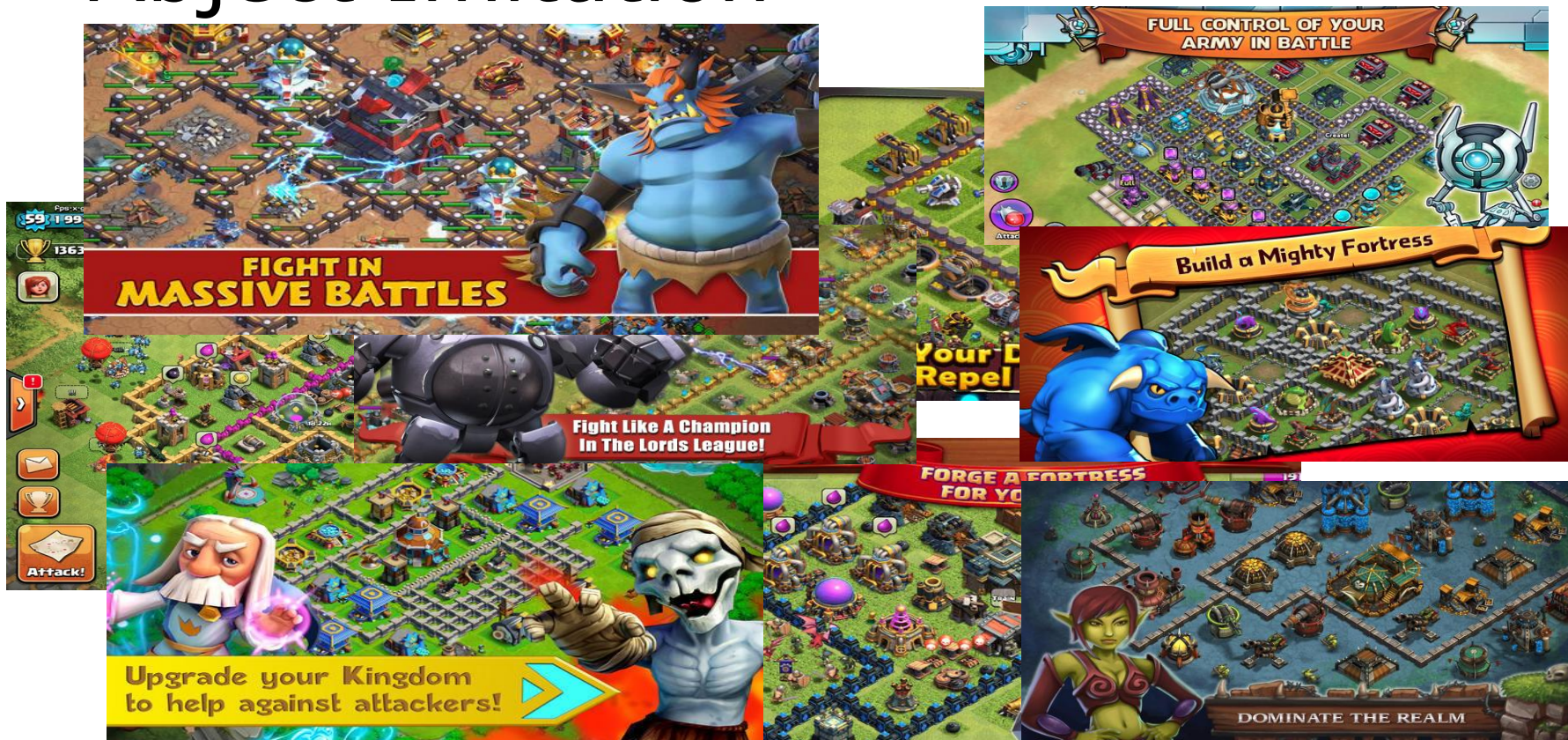
# If You Were Here Last Year...



Hi! I'm Troy McClure!  
You might remember  
me from GDC  
presentations like  
"Clash of Clones".



# Abject Imitation



With thanks to "Innovation on the App Store" on imgur.com



# My 2014 Conclusions

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





# Results of My Bold Call To Action?







# 2014: Mobile RTS in iOS Top Grossing

- #1 Clash of Clans
- #43 Castle Clash
- #85 Royal Revolt 2
- On Deck: Boom Beach



# 2015: Mobile RTS in iOS Top Grossing

- #1: Clash of Clans
- #6: Boom Beach
- #53: Star Wars Commander



**KEEP  
CALM  
AND  
WHY  
BOTHER ?**







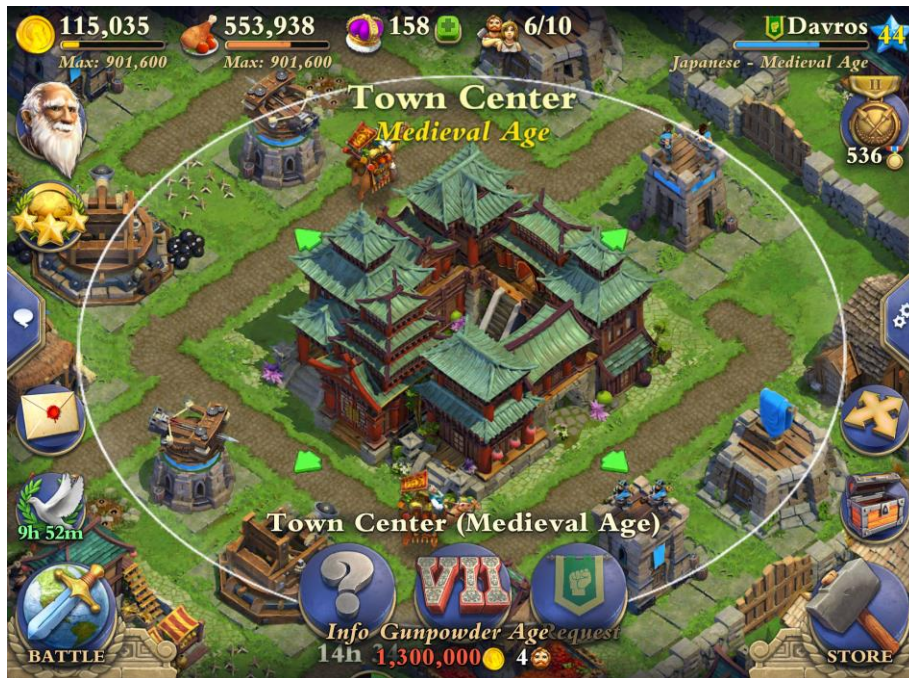


# Trade Goods and Mercenaries





# Ages





# Research







# Wonders





# Defensive Troops

## Garrison (Level 4)



*Produces soldiers when the town is under attack. Good against attacking soldiers. Upgrades will also effect level of Town Center defenders.*

-  *Hitpoints*  
**1,600**
-  *Defender Type*  
**Phalanx**
-  *Defenders Per Wave*  
**4**
-  *Maximum Defenders*  
**7**
-  *First Wave Time*  
**10s**
-  *Additional Waves Time*  
**26s**







# Choosing a Side





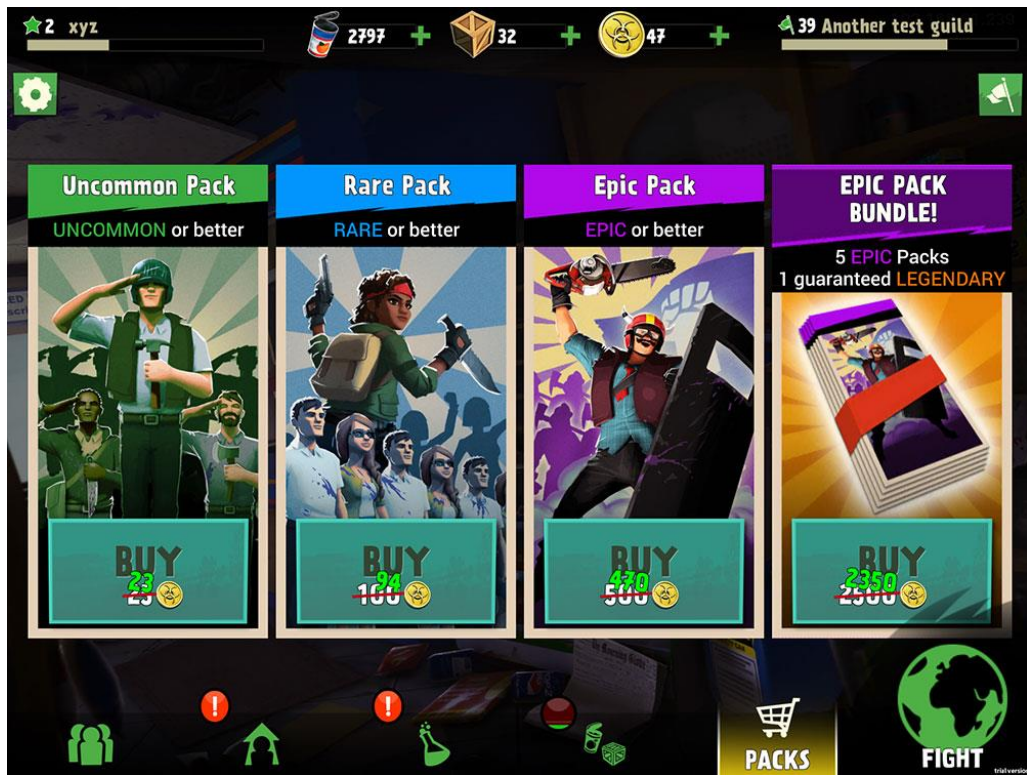
# Wave Propagation Battle







# Random Troop Packs

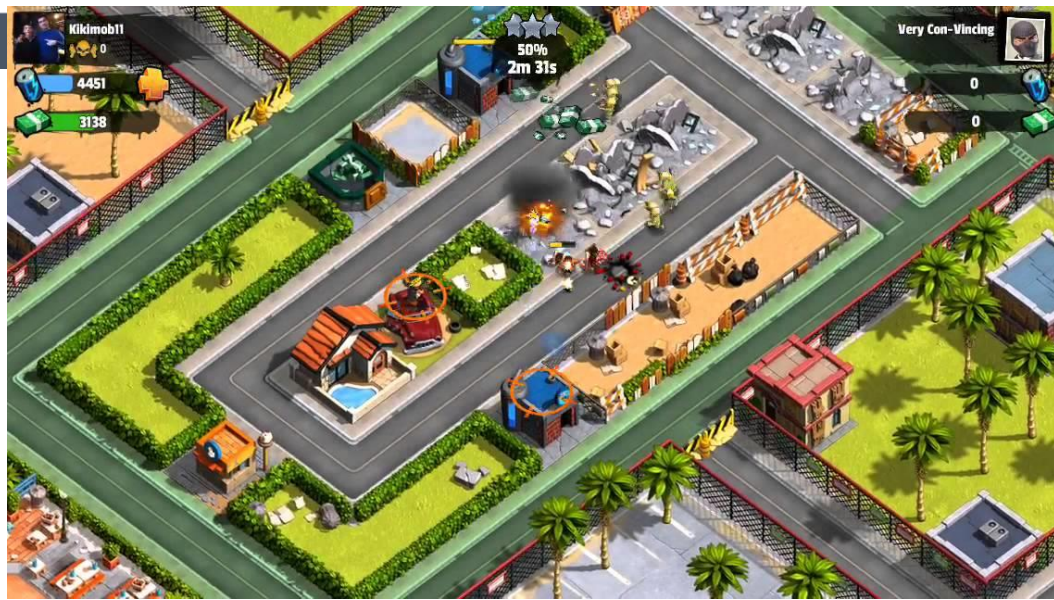




# Storyline Campaign







MARCH 2-6, 2015 GDCONF.COM





MARCH 2-6, 2015 GDCONF.COM



UNLEASH DEVASTATING  
ANCIENT POWERS





MARCH 2-6, 2015 GDCONF.COM



**Fine-Tune Your Attacks with  
Direct Control**



# Takeaways

- Someone other than Supercell innovating
- 2015 is the year we begin to see non-Supercell hits
- Still plenty of room for exploration



# **3. Level-Based Progression**





# Level-Based Progression Games

- Maps
- Gameplay
- Keys to Success
- King



# Item One: **Maps**

- Progression Maps Are Everywhere



# Remember Candyland?





# It's Still Here!







About 20% of the top-grossing games across all platforms are level-based progression games

### Top Grossing Apps - as of 2/20/2015

Rank	Facebook	iPhone	iPad	Android
1	DoubleDown Casino	Clash of Clans	Clash of Clans	Clash of Clans
2	Candy Crush Saga	Game of War	Game of War	Game of War
3	Slotomania	Candy Crush Saga	DoubleDown Casino	Candy Crush Saga
4	Farmville 2	Boom Beach	Candy Crush Saga	Candy Crush Soda Saga
5	Candy Crush Soda Saga	Big Fish Casino	Candy Crush Soda Saga	Boom Beach
6	Farm Heroes Saga	DoubleDown Casino	Big Fish Casino	Farm Heroes Saga
7	Zynga Poker	Slotomania	Hay Day	Big Fish Casino
8	Heart of Vegas	Heroes Charge	Boom Beach	Hay Day
9	DoubleU Casino	Hay Day	GSN Casino	Slotomania
10	Bingo Blitz	Farm Heroes Saga	Bingo Bash	Summoners War
11	Battle Pirates	MARVEL Contest of Champions	Farm Heroes Saga	Clash of Kings
12	High 5 Casino	Madden NFL	Heart of Vegas	Bubble Witch 2 Saga
13	Hit it Rich!	Kim Kardashian: Hollywood	Hit it Rich!	Castle Clash
14	Caesars Casino	GSN Casino	Slotomania	Family Guy: Quest for Stuff
15	House of Fun Slots	Trivia Crack	Cookie Jam	Pet Rescue Saga
16	Jackpot Party Casino	Summoners War	Bubble Witch 2 Saga	Madden NFL
17	Pet Rescue Saga	Family Guy: Quest for Stuff	myVEGAS Slots	Cookie Jam
18	GSN Casino	The Simpsons: Tapped Out	Gummy Drop!	Brave Frontier
19	Criminal Case	Bubble Witch 2 Saga	Jackpot Party Casino	House of Fun Slots
20	War Commander	Trivia Crack (Ad Free)	The Simpsons: Tapped Out	MARVEL Contest of Champions
21	myVEGAS Slots	Criminal Case	The Sims FreePlay	Jackpot Party Casino
22	Bingo Bash	myVEGAS Slots	Minecraft	GSN Casino
23	Soldiers Inc.	Cookie Jam	Bingo Blitz	Hit it Rich!
24	Klondike	Jackpot Party Casino	Slotomania HD	Bingo Blitz
25	Stormfall: Age of War	Minecraft	War of Nations	DoubleDown Casino
26	Cookie Jam	Hit it Rich!	Family Guy: Quest for Stuff	Trivia Crack
27	Old Vegas Slots	Pet Rescue Saga	Pet Rescue Saga	Heroes Charge
28	Sparta: War of Empires	The Hobbit	Criminal Case	Racing Rivals
29	Farmville	The Sims FreePlay	House of Fun Slots	myVEGAS Slots
30	Bubble Witch 2 Saga	8 Ball Pool	SimCity BuildIt	Empire Z
31	League of Angels	Racing Rivals	MARVEL Contest of Champions	Puzzles & Dragons
32	Top Eleven Be a Football Manager	World Series of Poker	Wizard of Oz Slots	SimCity BuildIt
33	Pearl's Peril	Underworld Empire	Farmville 2	Kim Kardashian: Hollywood
34	Best Casino	Bingo Bash	Modern War	Knights & Dragons
35	Kitchen Scramble	Gummy Drop!	Pixel Gun 3D	8 Ball Pool
36	Mafia Wars	Wizard of Oz Slots	Madden NFL	Farmville 2
37	Big Fish Casino	SimCity BuildIt	Pharaoh's Way Slots	Bingo Bash
38	Diamond Digger Saga	House of Fun Slots	Frozen Free Fall	The Hobbit
39	MARVEL: Avengers Alliance	Frozen Free Fall	Kim Kardashian: Hollywood	Diamond Digger Saga
40	Ghost Tales	Texas Poker	DoubleU Casino	Age of Warring Empire
41	Bejeweled Blitz	Knights & Dragons	Covet Fashion	DoubleU Casino
42	Royal Story	Covet Fashion	Heroes Charge	Panda Pop
43	Family Farm	Marvel Puzzle Quest	The Secret Society	The Sims FreePlay
44	Wartune	War of Nations	Hearthstone	Caesars Slots
45	Pirates: Tides of Fortune	Farmville 2	World Series of Poker	Empire: Four Kingdoms
46	Total Domination	Heart of Vegas	Dragon City	The Simpsons: Tapped Out
47	Mirrorball Slots	Cooking Fever	Summoners War	Minecraft
48	Kingdoms of Camelot	Dragon City	Slot Bonanza HD	Wizard of Oz Slots
49	Monster Busters	My NBA 2K15	Cooking Fever	Star Wars Force Collection
50	Throne Rush	Bejeweled Blitz	World of Tanks Blitz	MARVEL Puzzle Quest







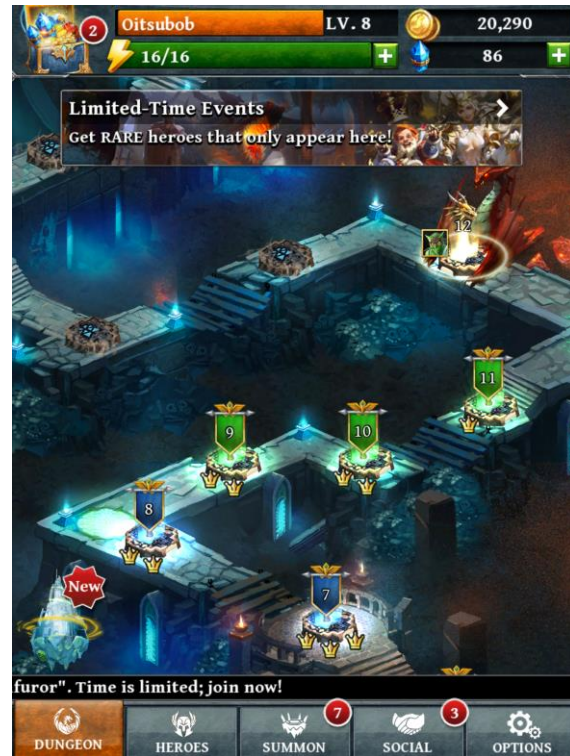
# But not all maps look the same.



Godzilla Smash 3



Kingdom Rush Origins



Dungeon Gems



# And some games have two



Spellfall World Map

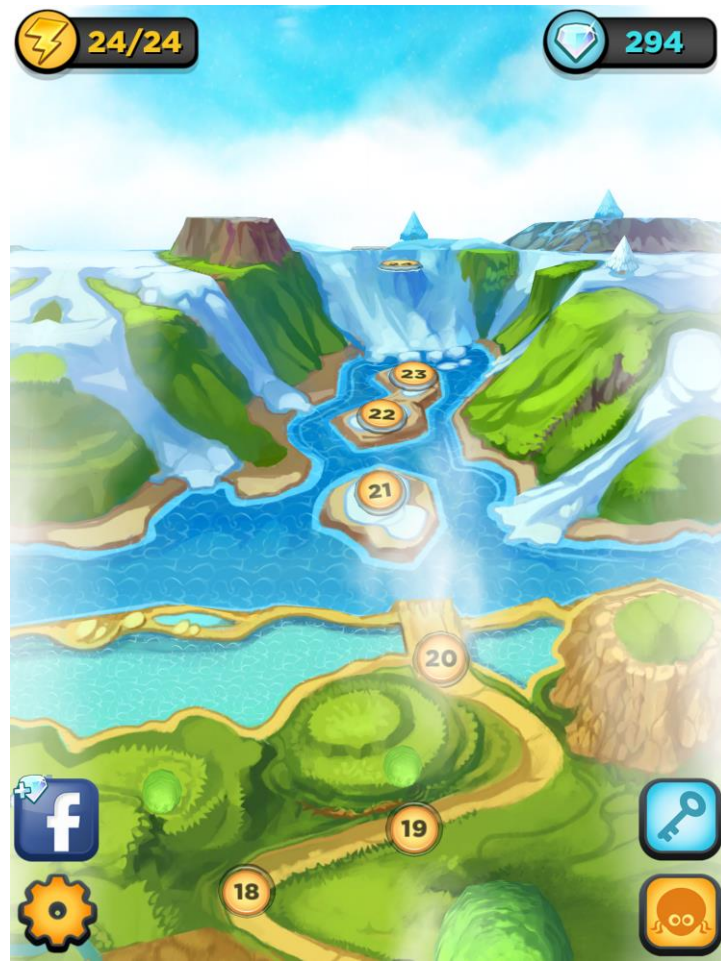


Spellfall Node Map





Best Fiends took a nice step forward with a 3D map that spins like a Rolodex





And some games  
have introduced  
gameplay right on  
the map



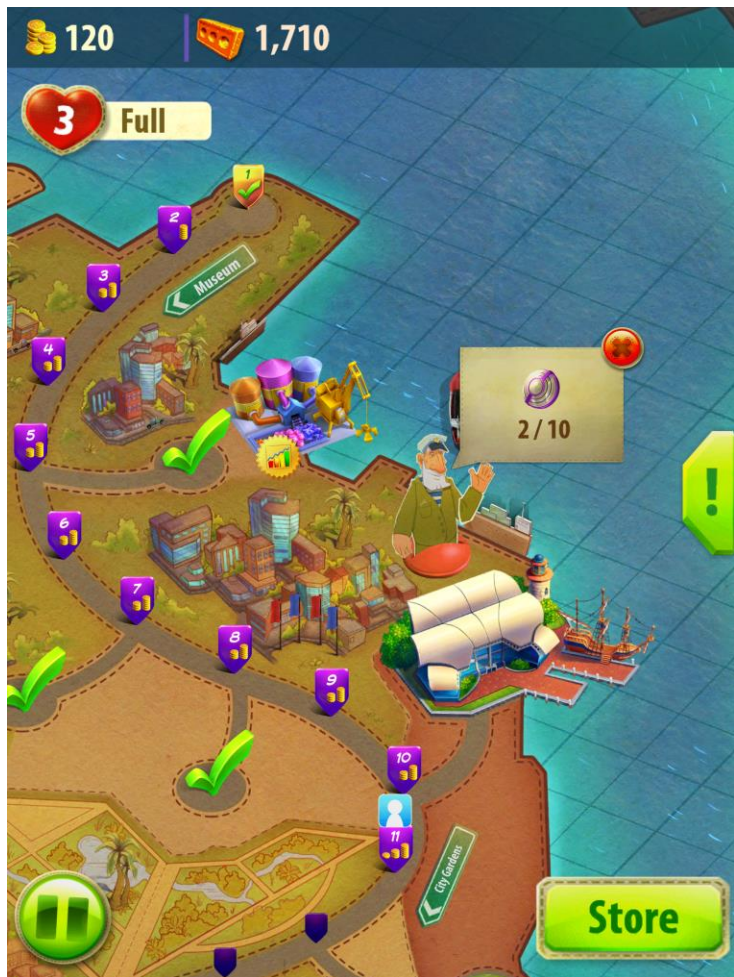
Need a Hero





# The newest twist on maps comes from Gummy Drop

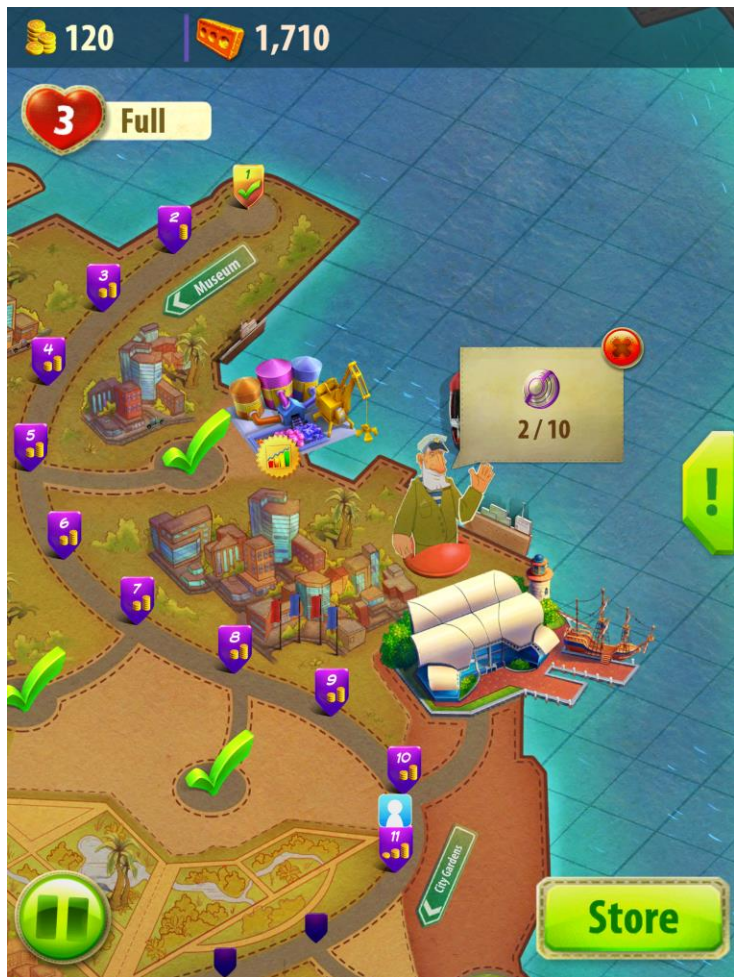
- The map matters
- You have to replay levels to get resources that previously weren't there





# The newest twist on maps comes from Gummy Drop

- The map matters
- You have to replay levels to get resources that previously weren't there





# Prediction #1: **Maps**

Progression Maps will get ever more complex, and we will start to see more Meta games being played out on the map.



## Item Two: **Gameplay**

- Most level-based progression games use some flavor of “Matching” as their basic gameplay mechanic



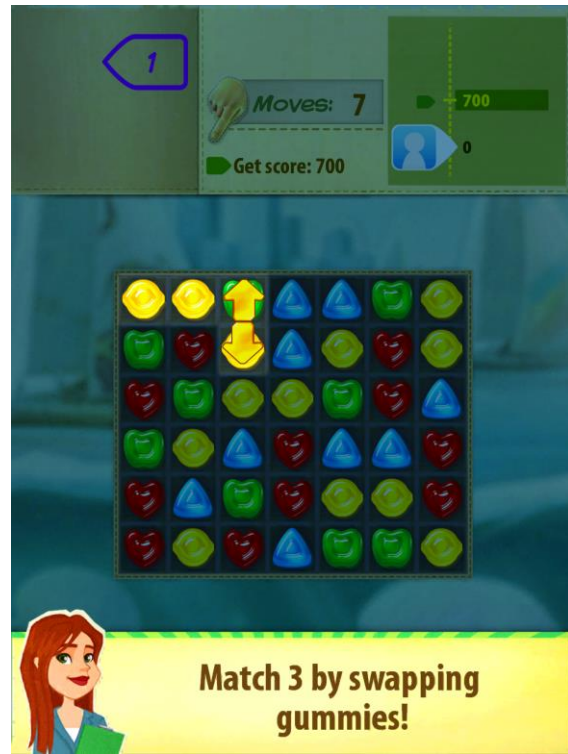
# Swap



Candy Crush



Cookie Jam



Gummy Drop





# Drag



Jelly Splash



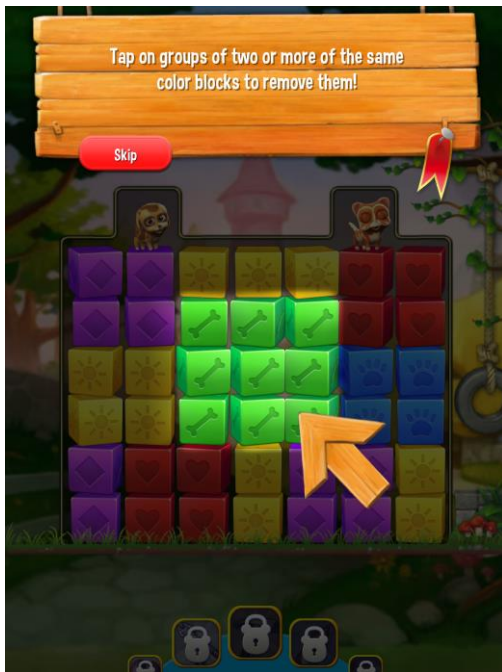
Best Fiends



Godzilla Smash 3



# Block Match



Pet Rescue Saga



Diamond Digger Saga



# Bubble Shoot



Bubble Witch Saga 2



Panda Pop

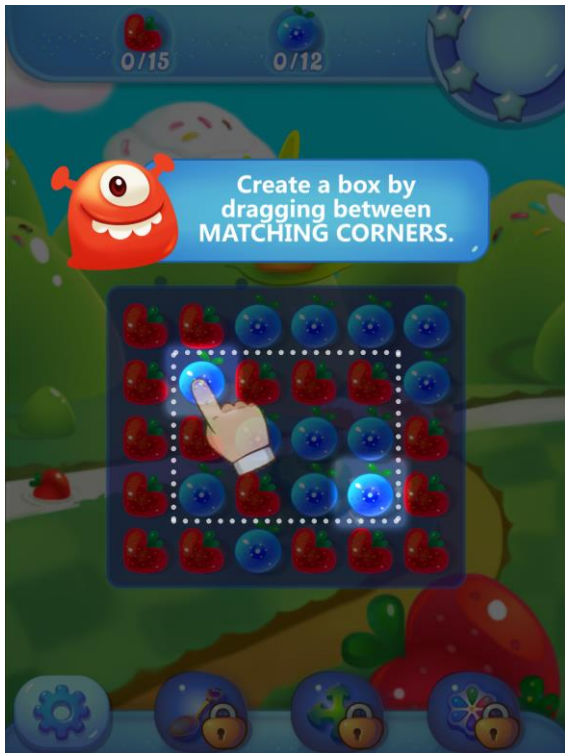


Bubble Mania





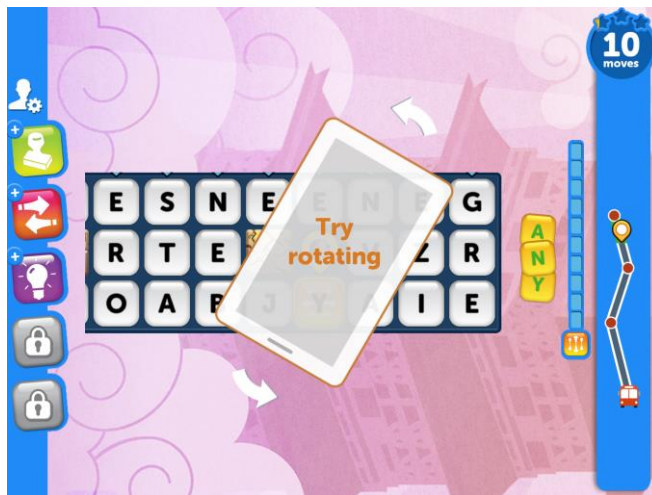
# Innovations on the Gameboard



Jolly Jam



# Innovations on the Gameboard



Words on Tour





# Innovations on the Gameboard



Candy Crush Soda Saga



# Innovations on the Gameboard



Candy Crush Soda Saga





# Tile matching has spread to other genres (and to midcore)



Detective  
(Another Case Solved)



Dark Fantasy RPG  
(Puzzle & Dragons)



Horror  
(Godzilla Smash3)



Light Fantasy RPG  
(Best Fiends)



## Prediction #2: **Gameplay**

Gameplay will continue to get more complex, and we will start to see even more genres use tile-matching as their core game mechanic.



# Item Three: **Keys to Success**

- Extremely short FTUEs
- Virtually No Story
- Simple Themes
- Beautiful Tiles
- Over The Top Graphical Rewards
- Liberal Early Granting of Power-ups





# Extremely Short FTUEs



Candy Crush Soda FTUE



# Virtually No Story



Gummy Drop



Cookie Jam



Farm Heroes Saga



# Simple Themes



Candies



Cookies



Pets

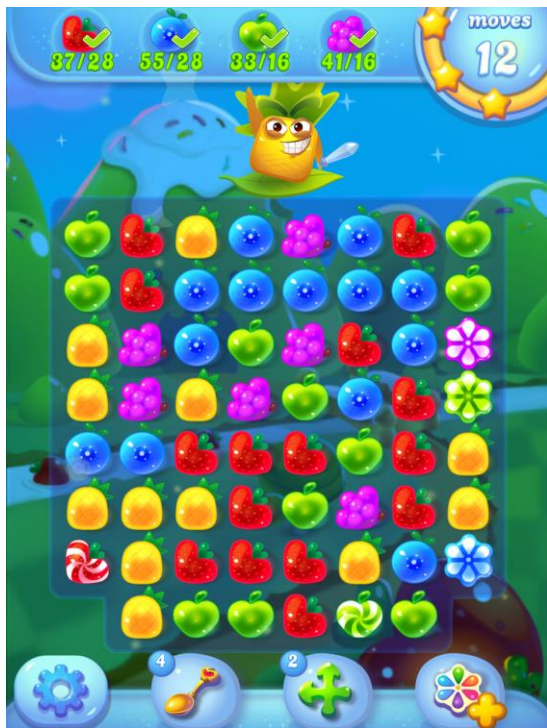


Farms





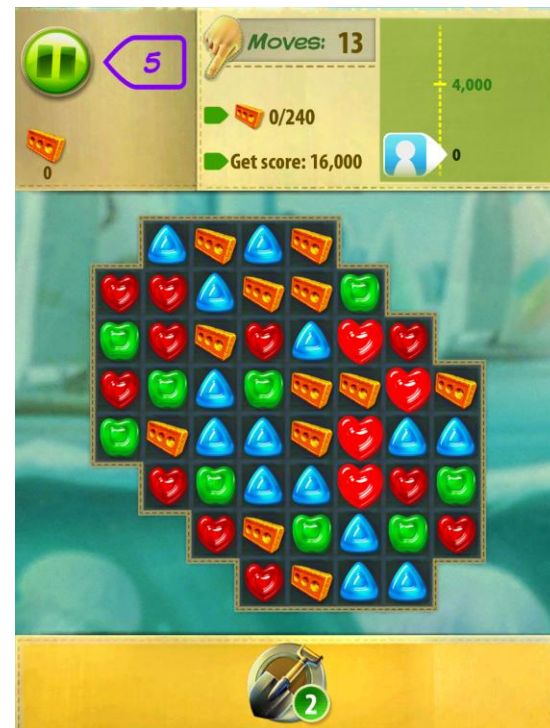
# Beautiful Tiles



Jolly Jam



Spellfall

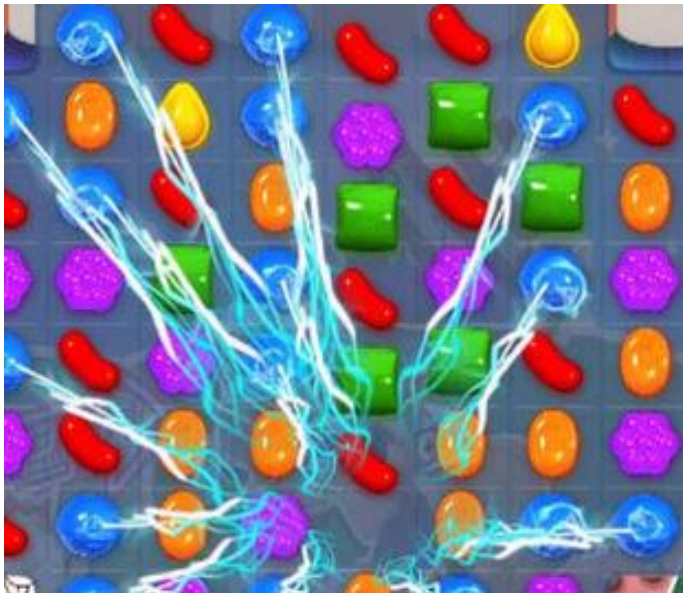


Gummy Drop

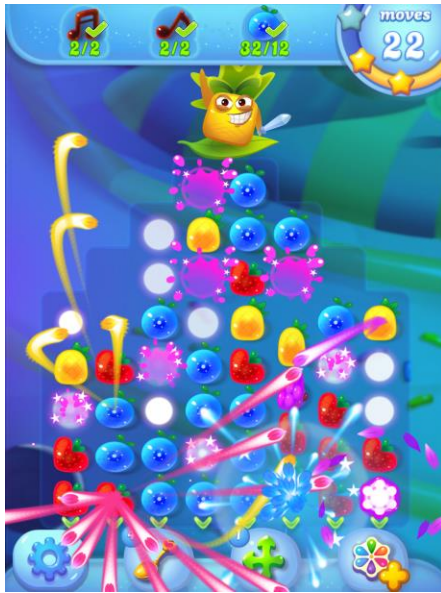




# Over the top graphical rewards for moves



Candy Crush



Jolly Jam



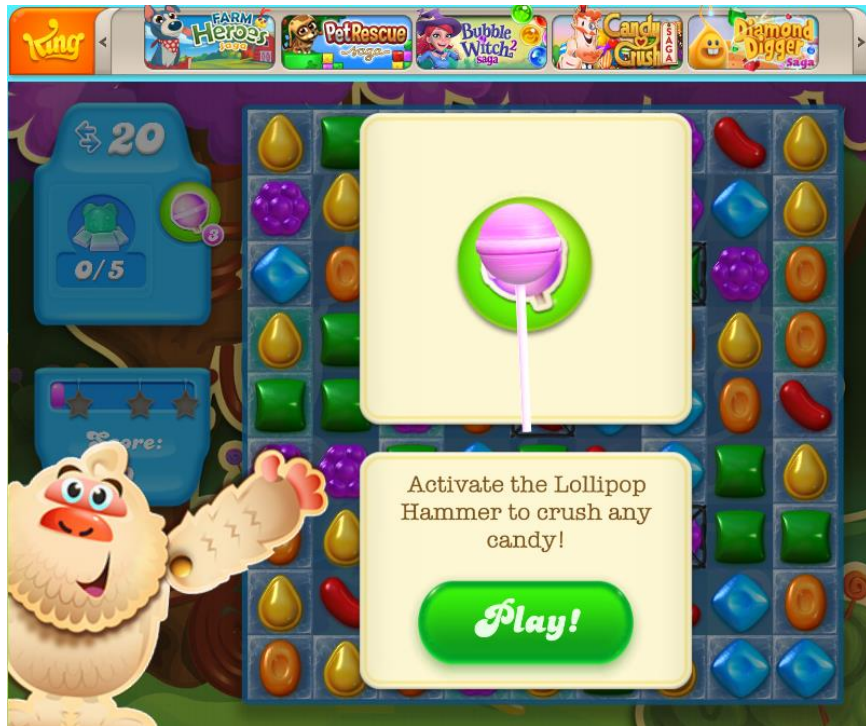
Gummy Drop



# Liberal Granting of Power-Ups



Cookie Jam



Candy Crush Soda Saga



# Prediction #3: **Keys to Success**

- Desperately simple FTUEs
- Awesome graphics and sound
- Liberal (early) granting of PowerUps



## Item Four: **King**

- At the beginning of 2014, many wondered if King would have success beyond Candy Crush Saga





## iPhone 1/1/2014

Grossing		
1	Candy Crush Saga King.com Limited	-
2	Clash of Clans Supercell	-
3	Puzzle & Dragons (English) GungHo Online Entertainment,...	-
4	Game of War - Fire Age Machine Zone, Inc	-
5	Big Fish Casino - Free Slots,... Big Fish Games, Inc	-
	Minecraft - Pocket Edition Mojang	-
6	Hay Day Supercell	▲1
7	Pet Rescue Saga King.com Limited	▲2
8	Slotomania - Free Video Slot... Playtika LTD	▲6
9	The Simpsons™: Tapped Out Electronic Arts	▼3
10	The Hobbit: Kingdoms of Mid... Kabam	▼2
11	Deer Hunter 2014 Glu Games Inc.	▼1
12	MARVEL War of Heroes Mogaba, Inc.	▲3
13	The Sims™ FreePlay Electronic Arts	▼2
14	DoubleDown Casino - Free Sl... Double Down Interactive	▲7
15	Legend of the Cryptids Appilbot Inc.	▲58
16	Heads Up! Warner Bros.	▼4
17	Dragon City Mobile Social Point	▼4
18	Despicable Me: Minion Rush Gameloft	▲1
19	Slots - Pharaoh's Way CERVO MEDIA GMBH	▲11

## iPhone 1/27/2015

Grossing		
1	Clash of Clans Supercell	
2	Game of War - Fire Age Machine Zone, Inc	
3	Candy Crush Saga King.com Limited	
4	Candy Crush Soda Saga King.com Limited	
5	Boom Beach Supercell	
6	Madden NFL Mobile Electronic Arts	
7	DoubleDown Casino - Free Sl... Double Down Interactive	
8	Big Fish Casino - Free Slots,... Big Fish Games, Inc	
9	Trivia Crack Etermax	
10	Hay Day Supercell	
11	Farm Heroes Saga King.com Limited	
12	Slotomania - Free Video Slot... Playtika LTD	
13	Trivia Crack (Ad Free) Etermax	
14	GSN Casino - Slots, Bingo, Vi... Game Show Network	
15	Brave Frontier gumi Inc.	
16	Kim Kardashian: Hollywood Glu Games Inc.	
17	Hit it Rich! Free Casino Slots Zynga Inc.	
18	myVEGAS Slots - Free Las V... PlayStudios	
19	Jackpot Party Casino - Slots Phantom EFX	
20	Pet Rescue Saga King.com Limited	

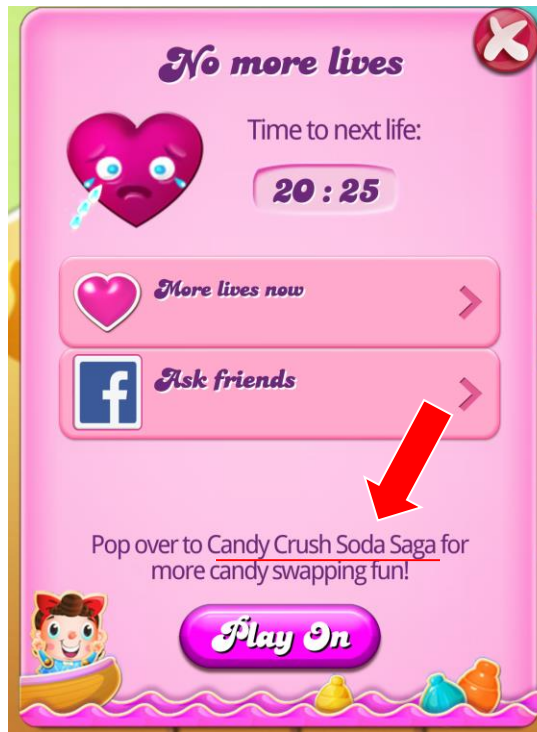
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31	League of Angels	Racing Rivals	MARVEL Contest of Champions	Puzzles & Dragons
32	Top Eleven Be a Football Manager	World Series of Poker	Wizard of Oz Slots	SimCity BuildIt
33	Beach Life	Madagascar: Escape 2 Africa	Farmville 2	Kim Kardashian: Hollywood



# King in 2014

- Revenue up 20% to \$2.4 billion.
- 2014 profit of \$950 million.
- Of the five mobile games they launched in 2014, four became top-15 grossing hits.
- King has become adept at transitioning players between their games.





## Prediction #4: **King**

- King has a deep pipeline, and they will continue to succeed.



# Conclusions

- Gaining complexity, but still be accessible and beautiful.
- More meta-gameplay on the maps, and new wrinkles on established gameplay within the levels.
- Match-3 will enter a broad range of genres, including midcore games.





# Hour 2 Lineup:

## Free-to-Play Thick Client, Console, and Indie Games

- AJ Glasser, Facebook
- Juan Gril, JoJu Games
- Frank Cartwright, Reloaded Games



# Questions?

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- Dave Rohrl – [daverohrl@gmail.com](mailto:daverohrl@gmail.com)



# Thank You

