

Game Design SECRETS

DO WHAT YOU NEVER THOUGHT POSSIBLE TO MARKET & MONETIZE YOUR IOS, FACEBOOK & WEB GAMES



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Expert advice to help you optimize design and marketing
- + Valuable Insights
Exclusive design lessons from top industry insiders
- + Unbeatable Advice
Real-world hits and misses and little-known tips and tricks

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Chapter 1

Market Overview: iOS, Facebook, and the Web

In This Chapter

- Understanding why to target these platforms
- Surveying the iOS game market
- Surveying the Facebook game market
- Surveying the web game market

This chapter gives you an overview of the three game platforms featured in this book—iOS, Facebook, and the web—and describes who plays on them, how many there are, and how much larger they're expected to grow.

Understanding Why to Choose These Platforms over Others

The combined audience size of these three game platforms—iOS, Facebook, and the web—is massive. Drawing from the estimates in this chapter, the audience size is between 600 and 800 million total. Besides that, there are at least three reasons for small and indie game designers to create for them in particular: market acceptance of low-budget games, direct connection to social media, and portability to other platforms. These reasons are discussed in more detail in the following sections.

Market Acceptance of Low-Budget Games

Due to their presence on multiple-use platforms (the iPhone is also a phone, Facebook is also for social networking, and so on), the market has proven to be far more accepting of games on Facebook, the web, and iOS. This is true even when the games are produced for low budgets and come with no-frills graphics, short playtimes, and extremely simple interactivity. Tap Pet Hotel (see [Figure 1-1](#)) is just one example of a best-selling, no-frills game.

Figure 1-1: App Store screenshots of Tap Pet Hotel, a top-grossing 2011 iOS game with no-frills 2D graphics.



Most of the best-selling iOS games, for instance, are not made with high-end graphics and other features that are typically costly to deploy.

The mega-blockbuster Angry Birds was reportedly developed by a core team of four.

Reviewing the 20 top-grossing iOS games of 2011, only one, Infinity Blade, boasted high-resolution 3D graphics. We see a similar pattern on Facebook, where games with simple, non-3D cartoon graphics, like CityVille, Texas HoldEm Poker, and Draw Something (the graphics are provided by the actual players) dominate, and on the web, where the biggest online games, like RuneScape and Club Penguin, are also graphically low-frills.

Direct, Frictionless Connection to Social Media

All three platforms can be seamlessly integrated with social media and e-mail, making it extremely easy for fans to promote their favorite games to friends: Click a Tweet that links to a new Facebook game, and start playing it within a few seconds. Or, post a link to an iOS game on your Facebook wall, and anyone who clicks it will be taken directly to its purchasing page in Apple's App Store. Yes, the three major game consoles have at least some integration with Facebook and other web- or phone-based social media, but this is mainly for promotional purposes and there are several barriers and a serious lag time between, for example, recommending a favorite PS3 game on your Facebook wall and your friends being able to buy/download and play it. (By contrast, Facebook and, increasingly, the web and iOS games, *encourage* players to share game content and gameplay with each other—an important viral marketing and growth mechanism for these games.)

Portability to Other Platforms

As you'll see in later chapters, these three platforms are compatible with a number of development

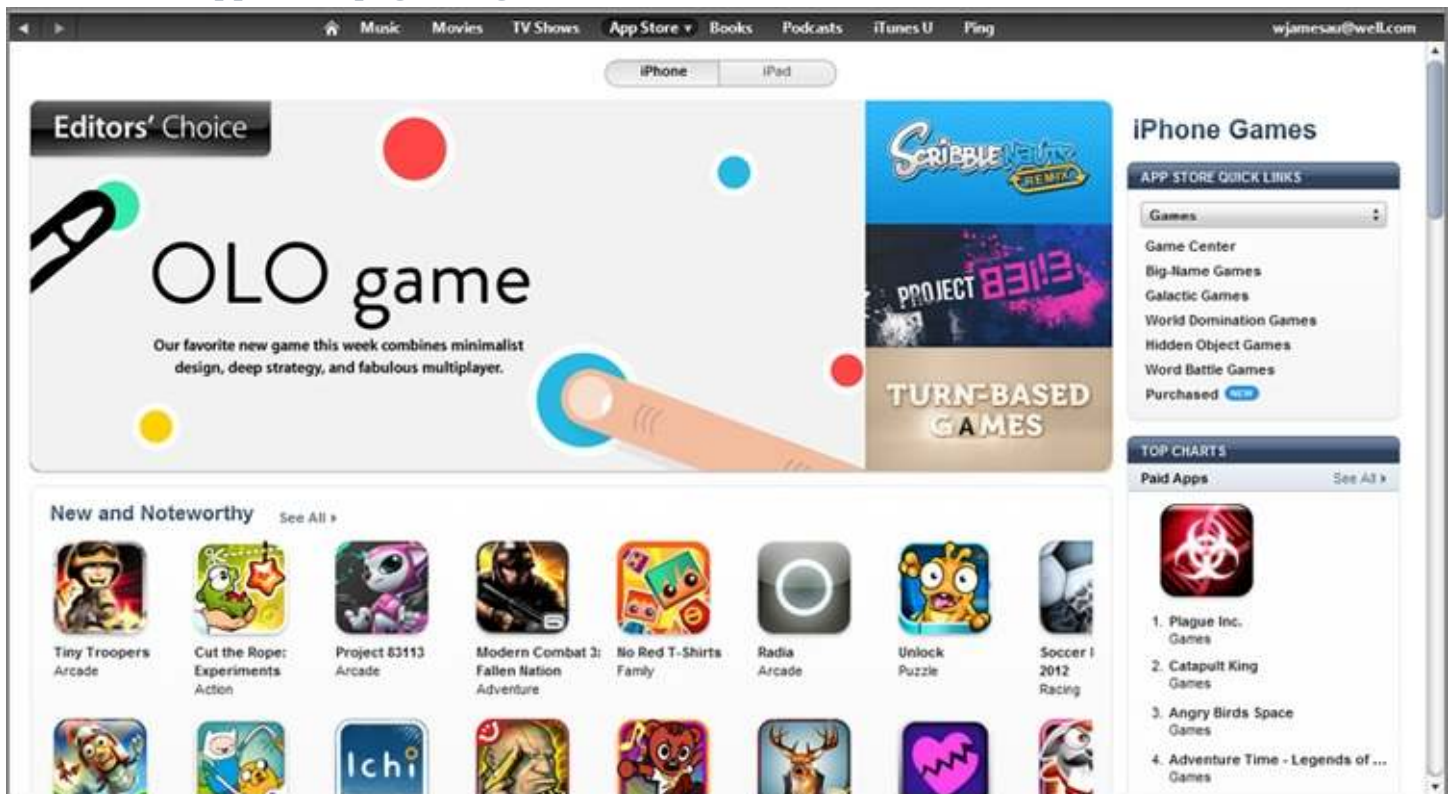
platforms, which makes porting between them relatively easy. For instance, web games made in HTML5 or Unity are compatible with iOS, and Facebook games can and have been ported to other social networks. (Yes, they do exist, and are often surprisingly large.)

With all that established, here's a bird's-eye view of each platform in terms of users and market size.

Surveying the iOS Market

Now let's look deeper at the state of games on the platform that Steve Jobs made (see [Figure 1-2](#)).

Figure 1-2: iOS App Store page for games



Overall Install Base

The total install base of iOS devices currently exceeds 200 million, and, according to ReadWriteWeb, 90 percent of iOS owners are running iOS version 4.x or higher. Within this market, the iPad has an install base of approximately 60 million.

Player Demographics

According to top smartphone app analyst Flurry.com, as of February 2012, a reasonable estimate of the iOS gaming market is 110 million, with a roughly 50/50 gender ratio. “Between 0.5 and 6 percent of players—depending on game genres—use in-app purchases,” Flurry analyst Patrick Minotti told me.

NOTE See Flurry's blog, blog.flurry.com, and the posts “Mobile Freemium Games: Women Thrifty, Men Binge” and “Mobile Freemium Games: Gen Y Plays But Gen X Pays” for more details on iOS gamer demographics.

“In terms of geographical location,” says Minotti, “I would say it’s about 50 percent North America, 30 percent European Union, and 20 percent Asia.”

iOS games are primarily monetized through in-app purchases, with hardcore titles gaining most of their revenue. Fortunately for indie developers, the overwhelming share of games on the iOS market are made by them and not by established companies coming from another platform. This does not mean indie developers have it easy on iOS, however. In a survey, 63 percent said they’ve made less than \$10K from their iOS games *in their entire lifetime*.

CROSSREF Read more about all this in Chapter 11, “Quick Survey of the iOS Game Market.”

Projected Growth

Flurry projects the iOS game market to grow to more than \$1.25 billion in 2013.

Surveying the Facebook Game Market

Now let's turn to Facebook and get a quick read on who's playing games on Mark Zuckerberg's social network (usually when they're in the office, supposedly getting work done.) See [Figure 1-3](#).

Figure 1-3: Facebook's Apps and Games page



Overall User Base

As of mid-2012, shortly after its May IPO, Facebook has about 900 million monthly active users and 500 million daily active users. Since the company reports that 20 percent of this user base is in the United States and Canada, it's safe to estimate that more than 160 million Americans—that is, more than half the entire U.S. population—are on Facebook.

Player Demographics

As for Facebook users who play Facebook games, the social network reports that 70 percent of active users also use Facebook games and applications. So assuming 30–60 percent of them play games, it's reasonable to estimate there are about 255 to 510 million users who play one or more Facebook games a month. This user base is so large, it's also safe to say that it encompasses all the major demographics who use Facebook, from late teens up to people in their 60s.

NOTE One example of Facebook gaming's wide demographics: According to AppData.com, Playdom's hidden object game *Hidden Chronicles* has about 20 percent of fans who are in their mid-20s to mid-30s, and about as many who are over 55.

Monetization rates for Facebook games tend to be between 2 and 9 percent of each game's player base. (In other words, players who purchase and use Facebook Credits in a given game.)

Projected Growth

Facebook's penetration rate in developed countries is really high, and therefore, growth in the developed world is slowing. However, Justin Smith, a leading social media analyst at Inside Network, tells me that the social network is now strongly growing in Brazil and India. At current growth rates, it's reasonable to forecast that Facebook will have more than a billion users by 2013.

Facebook also has strong traction in other emerging markets in southern Asia, although Facebook may lose share in Asian markets if local social networks, such as China’s Sina Weibo and Japan’s mixi, maintain their popularity.

Surveying the Web Game Market

Finally, here’s the big picture of web games, sometimes overlooked by game developers and the tech industry but still quite large.

Overall Install Base

Web games are primarily developed in Flash, a platform that has a market penetration of more than 90 percent of all personal computers. Other web-based platforms, such as HTML5, WebGL, and Unity, will probably gain more prominence in the next few years (these are discussed in Chapter 10), but in the short to medium term, “web game” and Flash are almost synonymous.

CROSSREF For more about web-based platforms, see Chapter 10, “Future Trends and Opportunities for Web Gaming.”

Player Demographics

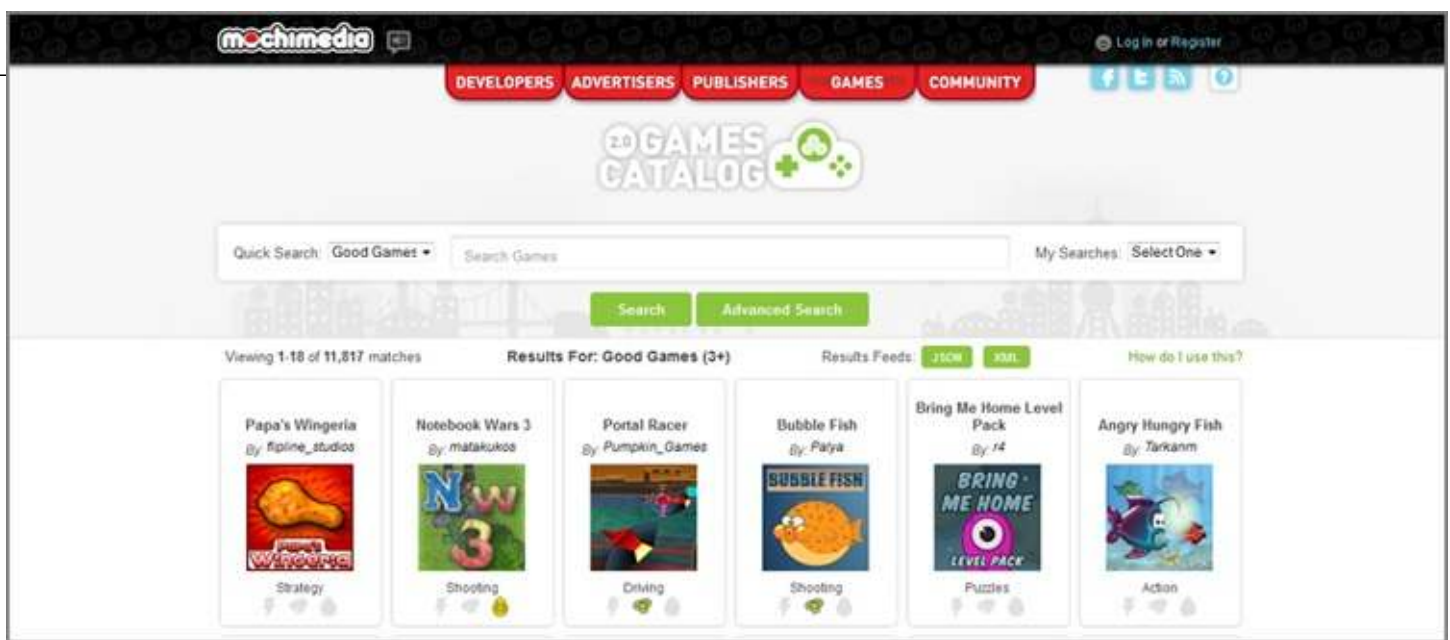
David Cole, head analyst with DFC Intelligence (www.dfcint.com), one of the game industry’s leading research firms, gave me this overview of the web-based gaming market in March 2012:

“Growth got hard hit by Facebook games on one hand and large client-based games on the other. The number of monthly active users is still high—about 200 million—but only about 10 million users are paying—that is, 5 percent.

“In terms of audience, you have primarily a teenage/young adult audience that skews more male. Very different than Facebook games, which skew older and more female. There is also a much larger percentage from Europe and emerging markets: Latin America, Russia, Turkey, and so on. North America is only about 20 percent.”

On this point, Mochi Media’s Colin Cupp concurred: “A lot of the players on the Mochi Media network are based in Brazil.” (Mochi is a leading web game advertising platform. See [Figure 1-4](#)) He added this explanation: “Consoles are typically too expensive for most of the gamers there, so they play online games. This has also resulted in a large (and thriving) game developer base in the region.”

[Figure 1-4](#): Web games on Mochi Media



Projected Growth

Cole's firm, DFC Intelligence, forecasts total revenue for browser-based games will be \$916 million in 2012, growing to \$1.20 billion in 2014 and \$1.46 billion in 2016.

Although only a small percentage of the browser market spends money on games, remember that developers can still earn indirect revenue from all their players through web ads and sponsorships.

Summary

Here are the key points we covered in this chapter:

- Facebook, the web, and iOS have three major advantages besides being the most popular game platforms: market acceptance of low-budget games, frictionless connection to social media, and portability to other platforms.
- Facebook has more than 900 million monthly users, about 30–60 percent who play games on the social network. This includes both genders and all the major age demographics.
- About 200 million people play web-based games, with an audience that skews teen/young adult and male. Only 20 percent are based in North America, with most of the audience in Europe and in emerging markets like Latin America, Russia, and Turkey.
- iOS has a total install base of more than 200 million, including 60 million iPads and 110 million monthly game players. About 0.5–6 percent of them (depending on genre) make in-app payments for games.

Chapter 2

iOS versus Facebook versus the Web: What's the Right Platform?

In This Chapter

- Reviewing what works and what doesn't on iOS
- Reviewing what works and what doesn't on Facebook
- Reviewing what works and what doesn't in web games

As you saw in the last chapter, the three platforms that are the focus of this book have a massive user base. But they're all far more cluttered with losers than winners, and there are opportunity costs in investing your game-development resources in one over the others. Apple's submission process for apps can be time-consuming and arduous, for example, not to mention that Apple and Facebook take a 30 percent commission on revenue, placing a substantial barrier on profit. The broader web, although offering more options and markets for publishing games, lacks the concentrated and direct monetization options that iOS and Facebook boast. (In other words, App Store users already have their credit cards registered in the system, while many Facebook gamers already have a bank of virtual currency, both of which make them more likely to spend on your game.) At the same time, some game genres generally work better on one platform than others, and all else being equal, offer a better opportunity for success. This chapter briefly sketches out the game genres and features that tend to perform well on each platform—and the kinds that usually don't.

Reviewing What Works and What Doesn't on iOS

A simple review of top App Store sales and downloads, regularly published by Apple and tracked daily by sites like AppData.com, will give you a pretty good picture of the game genres doing best on this platform. However, pay less attention to titles in the Top Paid Apps chart, and more to those on the Top Grossing Apps chart, because this chart will give you a better indication of the iOS games that bring in the most money.

As we'll discuss in more detail in Chapter 11, "Quick Survey of the iOS Game Market," hardcore games, particularly MMOs and RPGs, make the most money, with the biggest spenders from the U.S., Japan, and Korea. As I write this chapter in June of 2012, for example, nine of the top grossing iOS game apps fit in the hardcore gamer category:

- DragonVale
- Kingdoms of Camelot: Battle for the North
- Rage of Bahamut
- Minecraft—Pocket Edition
- Plague Inc.

- Castle Age HD
- Dragon Story
- Global War
- Kingdom Age

Six are casual/puzzle/social gaming:

- Bejeweled Blitz
- Tap Paradise Cove
- Smurfs' Village
- The Sims FreePlay
- Draw Something

And the remaining five are casino:

- Slotomania
- Zynga Poker
- Card Ace: Casino
- Slots Journey
- Texas Poker

This is more or less a typical spread.

What Works Best on iOS

Although hardcore titles are generally most likely to gross the most money on iOS, the games that are most successful on the platform have less to do with genre and more to do with their gameplay.

Games That Leverage iOS's Touch Interface

Although this may seem like an obvious point, the high number of games that are mere ports of handheld console games (see the section cleverly titled "Gaming Console Ports" later in this chapter) makes it worth stating here: Most top-selling iOS games emphasize use of the iOS unique touch/slide screen interface in gameplay. It is evident, of course, in blockbusters like Angry Birds, but almost all of 2011's top-grossing games also made central use of the touch/slide feature, including Tap Zoo (see [Figure 2-1](#)) and Tap Pet Hotel, which even emphasize the iOS interface in the actual game title.

Related to this, it's worth noting that the iPad, with its much larger screen, works even better than its smaller cousin for touch-based gameplay. It's for this reason that missing object games, in which players have to locate and point out items located within a large game environment, do particularly well on the iPad.

[Figure 2-1:](#) Tap Zoo, 2011's top-grossing iOS game



Short, Discrete Gameplay Sessions

Here's the thing about the iOS: For the most part, it's still mainly a mobile phone. Which means an iOS game is often (or usually) played in contexts where a mobile device comes in handy most: remote locations away from the living room or office, during idle times. (Say, waiting for a bus, traveling on a plane and, yes, sitting in a bathroom.) For that reason, the iOS is better suited to games with short, discrete gameplay sessions that the player can easily quit and return to at any given time. To take an iconic case, a complete Angry Birds level can be played in less than a minute, but typically takes several minutes. This is a good time frame to aim for.

2D or 2.5D Games

While many 2.5D games may appear to be 3D, using an isometric perspective, camera control over the game scene is severely limited. Hence the term 2.5D.

Another common feature in top-selling iOS games is 2D or 2.5D graphics, where gameplay is depicted on a flat, single-plane surface, or in a 3D space limited to a single perspective. This is probably due in part to the comparable difficulty of playing a 3D game on the flat surface of an iOS (see the section "Full 3D Games") and iOS touchscreen interface (see "Games That Leverage iOS's Touch Interface"), which works much better with 2D/2.5 gameplay, because touch literally connects the player to the screen.

What Doesn't Work on iOS

Now that you know what works best on iOS, take a look at what doesn't work so well.

Full 3D Games

The App Store's top-grossing list for 2011 is scant on games with full 3D graphics, which display in first-person perspective or display the game space with a camera that rotates along the full X/Y/Z axis. Indeed, the only 3D game to make the top-grossing chart in 2011 was the fighting/RPG game Infinity Blade (see [Figure 2-2](#)).

Figure 2-2: Infinity Blade, one of the few 3D games that performs extremely well on iOS

\$5.99 Buy App

This app is designed for both iPhone and iPad


Category: Games
Updated: Feb 03, 2012
Version: 1.4.1
Size: 595 MB
Languages: English, Chinese, Czech, French, German, Hungarian, Italian, Japanese, Korean, Polish, Russian, ...
Seller: Chair Entertainment Group
© 2010-2012 Chair Entertainment Group, LLC

Rated 9+ for the following:
• Infrequent/Mild Realistic Violence
• Frequent/Intense Cartoon or Fantasy Violence

Requirements: Compatible with iPhone 3GS, iPhone 4, iPhone 4S, iPod touch (3rd generation), iPod touch (4th generation) and iPad. Requires iOS 3.2 or later

What's New in Version 1.4.1
Update 1.4.1 contains bug fixes for lower-memory devices, rendering fixes, optimizations, and 5 additional game translations (Russian, European Portuguese, Brazilian Portuguese, Swedish, and Dutch).

Screenshots iPhone iPad



Top In-App Purchases

1 Bag of 25,000 ...	\$0.99
2 Bag of 150,000...	\$4.99
3 Bag of 750,000...	\$19.99
4 Bag of 2,500,0...	\$49.99

There are probably a number of reasons for the lack of top-selling 3D games on iOS, chief among them the gameplay context. Unlike a couch or desk, where 3D games are traditionally played, an iOS game is often played in open, public, and semi-public areas, where it's difficult for a player to devote the high degree of focus and time that 3D games typically demand. Further, maneuvering in a 3D space is difficult to do without the keyboard/joystick controls that PCs and consoles have but the iOS lacks. And if you've ever tried playing a 3D game on iOS, you're probably familiar with the calluses they tend to give your fingertips!

Gaming Console Ports

Games that are based on or ported from bestselling console and PC games are also scant on the App Store's top-grossing and top-paid lists. Although titles like *Grand Theft Auto : Chinatown Wars* and *Street Fighter IV* for the iOS draw respectable sales, they are consistently beat by indie games made on smaller budgets without any pre-existing brand recognition. Part of the problem is that most of these adaptations and ports use full 3D graphics (see "Full 3D Games"). Further, game ports often do not make use of the iOS touchscreen interface. And because they typically require higher production values and budgets, publishers feel pressured to sell their iOS ports at relatively high cost (the *Grand Theft Auto* and *Street Fighter* games currently sell for \$4.99 and \$9.99), which makes them less appealing to the larger iOS gaming market. (They can play countless games of near or equal quality for a little cost, or even free.)

The top PC/console game publishers are thus at a double disadvantage on iOS—which is good news for the indie iOS developer.

Reviewing What Works and What Doesn't in Facebook Games

I'll survey the most and least successful genres on the Facebook platform in more detail in the next chapter, but here's a broad and brief overview of key features that are best suited to games in Mark Zuckerberg's playland.

What Works Best on Facebook

Socially Networked Gameplay

As you'll read more about further on, all the popular Facebook games make heavy use of the social network's social features in myriad ways, such as game updates that can be posted to the player's profile wall and in-game leaderboards that track a player's success in relation to other Facebook friends playing the game. Doing this leverages the core aspect of Facebook that has made the social network so popular—the ability to rapidly share experiences with friends.

Short Game Sessions

That translates to an average of about 14 minutes on Facebook per day.

According to the Nielsen ratings service, U.S. Facebook users log in to the site an average of seven hours a month.

For the Facebook game developer, that translates into very short individual gameplay sessions—from three to five minutes. Of course, the ideal is to draw players into longer and more engaging gaming sessions, but designers need to *anticipate* the short session, “lunch break” activity pattern that most Facebook users follow.

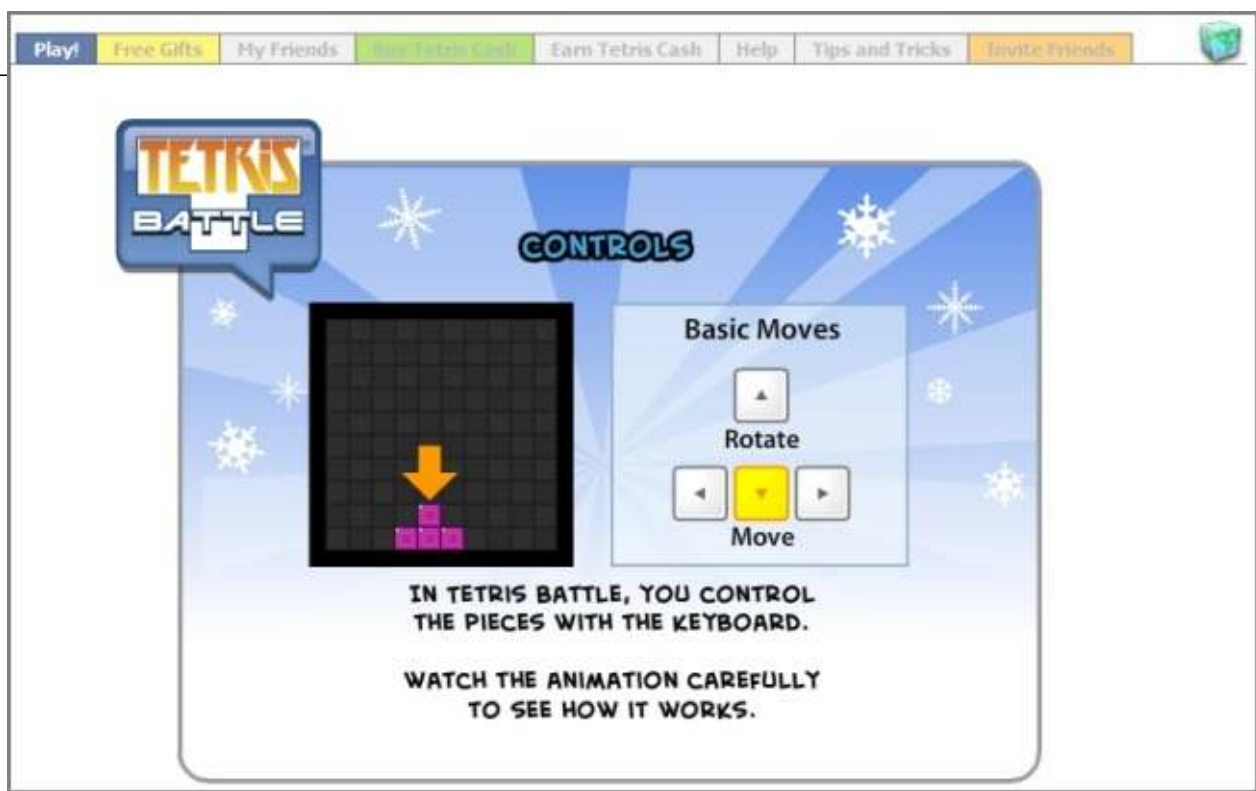
Point-and-Click Gameplay

Despite Facebook's continued predominance as a social network used on PC desktops and laptops, almost all its successful games make primary or exclusive use of point-and-click mouse-based interaction, with minimal use of the keyboard. This is in line with the user interface of Facebook itself, which emphasizes mouse-based interaction as much as possible, and the preferences of most Facebook gamers, who are casual, light gamers accustomed to simple gameplay interaction.

Tetris Battle, the only top Facebook game with keyboard-driven play, is an exception that proves this rule (see [Figure 2-3](#)).

Tetris Battle became popular, its lead designer told me, only after they added a loading page and tutorial that carefully explained its keyboard-based gameplay.

Figure 2-3: Tetris Battle's tutorial teaches Facebook gamers how to use the keyboard for play.



What Doesn't Work on Facebook

After four years of Facebook games, it's also possible to make some pretty fair generalizations about what doesn't work on the platform, as described in the following sections.

3D Graphics

Although Flash and other web platforms can now display robust 3D graphics, and some 3D games are popular on the larger web, no Facebook game with 3D graphics has achieved any significant popularity. This is due in part to the longer load times associated with graphics-heavy games and Facebook's preference for short session gameplay. It's probably just as much due to the mismatch of the attention required for a 3D game versus the lightly engaged, text-driven experience of the social network. As proof of this, consider Gaikai, the successful cloud-deployment service. In April 2012, it began offering high-quality 3D console games for free on Facebook, but as of June, it had gained fewer than 9,000 fans.

That is, monthly users in the six figures.

Poorly Networked Games

Just as all the top Facebook games heavily leverage the platform's social sharing features, most successful games emphasize gaming interaction between players. Very few, if any, games on Facebook are played on a solitary basis. Even games that were primarily solo on other platforms, such as Tetris and Bejeweled, have been re-designed to emphasize player-to-player competition through leaderboards, live matches, and other features that emphasize the fun of playing the game with (and against) others on Facebook.

Reviewing What Works and What Doesn't in Web Games

For this section, I spoke with experts from two of the larger web game publishers—Colin Cupp, Product Marketing Manager with Mochi Media, and Greg McClanahan, Director of Games and Achievements with Kongregate. Although their insights are most directly related to their respective companies' platforms, both publishers are large enough that they also apply to web games in general. That both of them mostly publish indie/low-budget games also points to the fact that the web is particularly well suited to grassroots, DIY developers.

CROSSREF You can find more information on Mochi Media and Kongregate in Chapter 7.

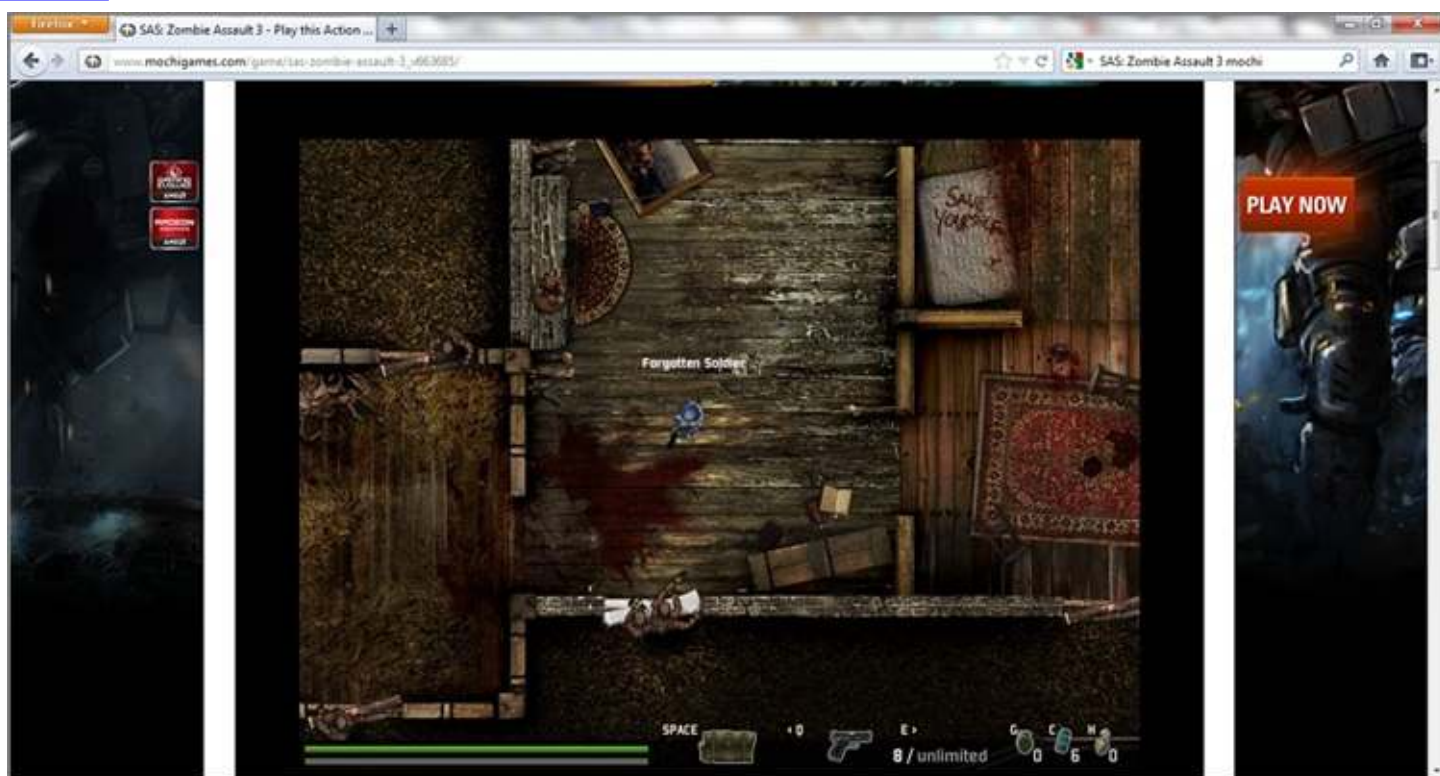
What Works Best in Web Games

First, starting with what works best on the web...

Demographic-Specific Genres

Colin Cupp of Mochi Media says, “Genres tend to map to specific audience types. For example, match-3 puzzles, such as Jade Monkey, tend to be really popular among women; the dress-up genre is popular with younger girls; and shooter/action genres, such as SAS: Zombie Assault 3, Raze 2, and so on, are very popular among teenage males.” See [Figure 2-4](#).

Figure 2-4: SAS: Zombie Assault 3



“With that being said,” says Cupp, “changing themes of games can often change the audience. An example of this is Bio Gems—a fighting or combat element is added to a match-3 puzzle, making it more attractive to teenage males compared to the typical match-3 game.” (See “Hybrid Genre ‘Twist’ Games” for more information.)

Tower Defense, Launcher, and (on Kongregate) High-Budget Games

Greg McClanahan of Kongregate says, “Tower defense and launcher games are especially popular right now.” See [Figure 2-5](#).

For Kongregate’s top-rated games, go to www.kongregate.com/games?sort=rating.

“If you sort Kongregate by rating, you’ll see these two types dominating by a degree disproportionate to how many of them we have on the site.”

Figure 2-5: Kingdom Rush, an extremely popular tower defense game on Kongregate



“I’m not entirely sure why this is,” says McClanahan. “It could be that the genres lend themselves well to games that are quick to get into and immediately fun. They’re also game experiences that are far less common on other platforms. Additionally, large, deep, high-production-value, polished games seem to do disproportionately well on Kongregate relative to the rest of the web—the Mardek series is a great example of this. When I’m doing Flash sponsorships, it often seems like short and simple games spread to other sites a lot better, even if their ratings on Kongregate aren’t great.”

Hybrid Genre or “Twist” Games

Again, Greg McClanahan of Kongregate: “Another genre popular in the Flash world is games that don’t fit into a predefined genre very easily. Oftentimes developers can score big points with players by showing them something unique and fun. For example, most games by [Kongregate developer [Nerdook](#)] are difficult to characterize by genre.

<http://www.kongregate.com/accounts/nerdook>

“Elephant Quest [see [Figure 2-6](#)] is a blend between platformer, RPG, and shooter. Platformer games by themselves usually aren’t very popular, but platform games with some kind of unique twist are popular, such as Company of Myself, One and One Story, Enough Plumbers, Chronotrope, Adventure Story, and Spewer. Other games, like Dolphin Olympics, Pandemic, and Music Catch, are

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