

# Ten, Eleven, Twelve

## 10 games from 2011 that tell you all about 2012

### Introduction

There will be no escaping games in 2012. From the Olympics to hit shows on TV, lucrative games on your mobile phone to innovative live events, games are more a part of our everyday lives than they've ever been.

This briefing document looks ahead to the key issues that can help guide your strategy in 2012. And, since the gaming world evolves fast, we've drawn some concrete examples of these trends from front-runners in 2011, so you can get to grips with what they mean in practice.

Read on for the inside track on toy cars that drive on iPad screens, street games that draw 12,000+ crowds, why Facebook games aren't on Facebook anymore, and how to build for the post-Flash world.



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# Who are Hide&Seek?

**Hide&Seek**  
Inventing new kinds of play



**Hide&Seek** are the UK's oldest established agency for play.

We started the UK's **first live gaming festival** on London's Southbank in 2007, and since then have produced a variety of award-winning real-world and digital play experiences for a wide range of brands, institutions and audiences.

We've made an **iPhone game** for the **Royal Opera House** and

invented **new street games** with **Sony PlayStation**. We've designed a **revolutionary Facebook game** for the **Sherlock Holmes** movie franchise and brought together **12,000 people in Edinburgh** to play in the New Year. We've reinvented Monopoly and Scrabble in our **Boardgame Remix Kit**, and built a provocative sister project for an acclaimed **FilmFour**

documentary. Our work features regularly in the national press, and has been recognised by the **Guardian Media Awards, D&AD, The Clio Awards** and **The One Show**.

Our work brings us into direct contact with the full scope of modern gaming, in terms of platforms, audiences and purposes. The insight we gain from this enables us to offer targeted, practical consultancy

for a range of clients across sectors: broadcasters like the **BBC** and **CBSiMG**; agencies like **W+K, We Are Social** and **Ogilvy**; and institutions like **Tate Modern** and **The Southbank Centre**.

Games are a powerful part of all our lives, now. If you'd like us to help make them a powerful part of your 2012 strategy, then **our details are on the back page**.





## As seen in: Zynga Direct

In October, social games giant **Zynga** announced that it was developing its own platform for social games - **Zynga Direct**. *"It's a platform for a direct relationship with consumers whether on the web, or on mobile,"* explained CEO Mark Pincus. It's not immediately clear whether Zynga Direct is a distribution service or a whole social network that Zynga is building independently of **Google+** and **Facebook**, but it's clear that it indicates a major shift for Zynga.

Currently Zynga is heavily linked to Facebook: all its games are tied to Facebook's login and social graph, not to mention the various exclusivity deals tying its games to Facebook for the foreseeable future. But this announcement indicates the beginning of a shift away from relying on the Facebook platform: now, Zynga can exert greater control over the platform its games are played on.

It's an understandable move when you consider the shape of Facebook in 2011. Customer acquisition costs are becoming increasingly expensive; the marketplace is beginning to saturate with products and clones; Facebook's own services (like **Facebook Connect** and **Facebook Credits**) are enabling titles outside the Facebook "canvas" to flourish. And native apps on Android and iOS can't use Facebook Credits for payment, forcing developers to adopt multiple-currency purchase schemes in their games.

Facebook isn't going to go away: it's where players are, after all. Canny integration of its platform is still key to success, especially given the viral growth that wall-updates and messages can drive. And players still expect to see it: they're comfortable logging into other sites using Facebook, and now expect to see their friends-list wherever they are.

But it's now time to consider games outside that walled garden: on stand-alone sites, and also on new platforms. **Spotify's** new developer platform, for instance, places apps inside its own client. Would you rather have a social music game on Facebook - or where music listeners and fans really are? As new platforms open up, it's time to embrace the post-Facebook social game landscape.

## It's time to embrace the post-Facebook social game landscape

## Key insights

- Facebook is not the only platform for social games
- Choose the right platform for your title
- Facebook integration is still important, wherever your app is

# Games with computers in them

Six adults are slowly stalking one another around an East End bar carpark. In their hands they hold lit Playstation Move controllers like candles; as they creep theatrically, the Brandenburg concertos play. Suddenly, the music speeds up comedically, and the players start running, trying to slap each other's hands. Unlucky players hear a buzzer and watch their controller turn red - and as the music slows, the "survivors" return to creeping around.

This is **Johann Sebastian Joust**, a game by Die Gute Fabrik. Is it a computer game? You can't play it without a computer, or digital controllers, that's for sure. But there are no screens in sight; instead, there's just six players chasing one another, a comedic soundtrack, and an increasingly vocal crowd looking on.

**Part digital, part real-world, the emphasis is on the players and their interactions**

JS Joust is a game with a computer in it: part digital, part real-world, and placing the emphasis firmly on the players and the interactions they have with one another. Like the *Appcessories* (see: *Digital toys, real-world play*), it fosters play outside the digital realm.

Gute Fabrik have a history of this type of game. **BUTTON**, for Xbox and PC,

is even simpler than Joust, and relies on the players to police themselves. Each player is trying to press a button on a joypad - on the other side of the room.

The TV screen gives instructions as to how to

achieve that - removing clothes, trying to hit other players' buttons, jumping, pretending - but the players are free to play within that framework.

And it's not just small indie developers working in this space. **Swinxs** have been exploring this for a while now, with a "screenless games console", designed for mediating outdoor play



Photo: Bennett Foddy

and games for children.

There's so much innovation yet to happen in this space. 2011 has shown how ripe it is; it will become increasingly mainstream in 2012. Where better to explore such games, for instance, than on smartphones - the computer you always have with you, even if the screen isn't visible. What sort of screenless games for friends to play to play together could you make for mobile phones, for instance?

**As seen in:** Johann Sebastian Joust

## Key insights

- Digital games don't have to be on a screen
- People often have a computer with them even if they can't always see it
- The best social game experiences happen in the real world, with real friends.

# Digital toys, real world play



## As seen in: Disney AppMATes

The pricing of digital content is increasingly becoming a "race to the bottom". Anything above 99c/69p on the App Store is a risk if you want massive mainstream success, and increasingly, free apps (with paid In-App Purchase) are becoming the norm.

Spinmaster's **AppMATes** - licensed by Disney - take an innovative approach to this revenue issue, and demonstrate a brilliant understanding of how children

play. Instead of pushing advertising, or in-app sales, they're selling real-world toys as "accessories". Place an AppMATes toy (pictured above) on top of the free iPad app and the app detects it. The iPad becomes a kind of digital playmat, and as you push the toy car over its surface, it begins to navigate a virtual world inside the iPad.

There are gamelike elements within the AppMATes apps, but it's clear that this is more than just a digital game: it's

also a real toy that fuses the magic of a rich, 3D, interactive world with real-world play. It's immediately obvious how to play with it. Like the best toys and games, it doesn't stifle a player's imagination: it embraces and amplifies it. And, for the manufacturers, it offers a clear revenue stream: parents are more likely to pay for physical toys that have seem to have tangible value, instead of expensive apps.

Appcessories have really taken off in 2011, and they're going to continue to be huge in 2012. And they're not just limited to playmats. Lego's **Life of George** combines a camera app with their building bricks, challenging the player to build images out of the bricks in the set and then using computer vision to score their progress.

**Skylanders: Spyro's Adventure** ties collectable toys to a home console game. Whilst it may look like a

traditional platform game, players swap characters by placing action figures onto a pedestal plugged into the console. Because any progress is saved to the toys themselves, players can take toys to friends' games and straight into the virtual world. And, of course, though the game comes with three toys, there are 37 to collect.

## The best toys and games embrace and amplify the player's imagination

## Key insights

- Digital content is dangerously aggressively priced
- Consumers are still willing to spend on physical goods
- Real-world goods and play tied to digital products is becoming a proven strategy

# Street games go mass market

2011 was the year that real-world gaming took off as a mass, consumer experience.

From origins like the **Come Out And Play festival** in New York, and the Hide&Seek's own **Weekender**, real-world gaming is evolving from a niche, low-budget activity to a full-scale consumer

event. Play in public space was always part of our social tradition; it was only with the advent of TV and radio

that it lost prominence. Now a new generation looking to be more social, more active, and more engaged in their environment is bringing it back to the fore.

**2.8 Hours Later** is an evening street game which has run across the UK, consistently selling out its £28 tickets. Players turn up to a central location, and must then navigate point-to-point

across the city, while evading the growing zombie horde. On successfully reaching the final check-point, they gain access to the zombie disco, complete with bar. These kind of experiences have been being run at a social level for years: 2012 will see an increasing growth of them undertaken as commercial activities.

**These kind of games have been social for years: 2012 will see them become commercial**

At a mass level, cities, communities and companies are also backing live gaming events. Edinburgh ushered in 2012 with **The New Year Games**,

commissioned by Creative Scotland, and designed by Hide&Seek. The Games divided the town into two teams, the Uppies and the Doonies, and asked them to win tokens for their team by competing in games staged across the city. From haunting interactive sound sculptures in St Giles Cathedral to helter-skelter bingo, over 12,000 people took part in the Games, with over 4000 returning for one last, vast crowd-participation ball game.



**As seen in:** The New Year Games

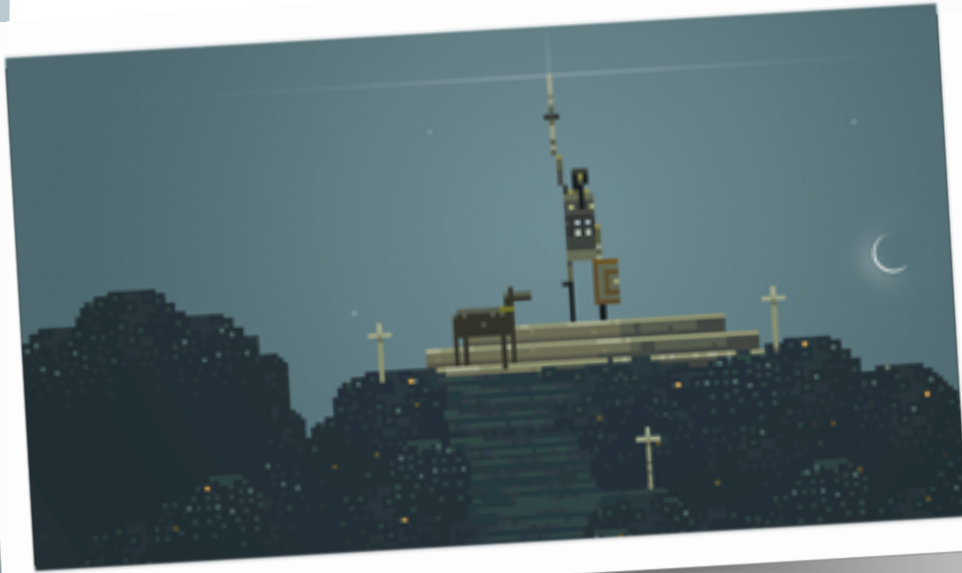
In 2012, expect to see this trend growing.

Festivals will continue to be a major focus - the Weekender in London, IgFest in Bristol, You Are Go in Berlin, Come Out And Play in New York and San Francisco. Also look for ticketed events, or games monetised through merchandise and selling memorabilia of specific events (via print-on-demand and similar processes). Cities, too, are increasingly getting in on the action, as are big public buildings, conferences and festival events, all of which offer rich sponsorship possibilities.

## Key insights

- Live play has been growing in popularity for years
- Consumers are increasingly willing to pay for live experiences
- Look for city-wide festivals and big commissioned events

# Indie games extend their reach



As seen in: *Sword and Sworcery EP*

2011 was when the indie games scene began to gain a firm grasp on really productising its output. Indie games now have a following much like indie music: as a scene, it has firm fans, and fans often follow individual games, developers, or genres. The indie scene as a whole is now understanding how to take advantage of that for mutual success.

The indie juggernaut that is **Minecraft** marked its 1.0 release with **MineCon**:

a two-day conference in Las Vegas at \$139 a head. 4,500 players came to Las Vegas, united by their love of a strange, blocky game somewhere between an RPG and a bottomless Lego box. Minecraft has always seemed more than just a game, and Minecon confirmed it. And Minecon isn't the only expansion of the Minecraft brand: Minecraft has branched out into a merchandise line, of t-shirts, fridge magnets, and even socks.

Indie developers are also finding new ways to capitalise on one another's success, through canny cross-promotion. Developers are happy to cross-promote within their own games: **Super Meat Boy**, for instance, features bonus characters from many other developers' games. Indie developers are fans in their own right - they're supporting one another in their call-outs to other games.

Nowhere is cross-promotion more evident than in the popularity of **indie bundles**, such as the **Humble Bundle**. Several games are packaged together, sold for pay-what-you-want pricing, with a cut going to charity, and bonus rewards for paying above the average. Gamers take advantage of the great prices, and developers gain exposure.

If one game illustrated the potential of indie-game-as-product in 2011, it was **Sword and Sworcery EP**. S+S was a product line from the very beginning -

an iOS game (the "EP") alongside a soundtrack album (the "LP"). The

game proclaimed its individuality through its art, its audio, and its writing, all of which became marketing

collateral. Idiosyncratic messages from within the game filled Twitter shortly after its release. The attitude of the developers was not that they were just making a game, but something much richer - a brand and an experience.

**The developers were not just making a game, but something much richer**

## Key insights

- Games don't have to be stand-alone products
- Brand extension - done right - can be hugely popular with fans and consumers
- Consider how the "edges" of your games or products might reach out

# Games as brand opportunities

Brands have been experimenting with games for years, from making their own to chasing product placement in big game titles. Despite hyperbolic assessments from industry analysts over the years, neither of these approaches has the impact predicted by some.

2011 introduced the the clearest shift in how brands can align themselves with gaming. The biggest game launch of the year was **Call Of Duty: Modern Warfare 3**,

which generated \$1bn in revenue in its first 16 days of launch.

The game had a deep reciprocal marketing deal with **Pepsi**: products like Doritos and Mountain Dew offered codes which could be redeemed within the game for opportunities to earn extra experience points, and level-up ahead of your friends. A 20-oz bottle would give you a code for 15

minutes of double experience points; a 20-can pack would give you 90 minutes.

This isn't the first time Pepsi has run the Mountain Dew Gamer Fuel promotion, but it's the first time it has had such a huge impact. Previous

iterations offered nothing more than a change of label, and were rapidly discontinued. The Modern Warfare tie-in offered actual in-game advantage for choosing the product

and has been markedly more successful. It's an approach that generated a hostile response from some committed fans, but in general worked well to drive product purchase and game awareness.

Similarly, other big brands brought their sponsorship to the inaugural Call of Duty festival - **Call of Duty XP**. Around 6000 people payed \$150 per ticket for a two-day event, which

**Games are the IPs with the biggest gravitational pull: brands need to learn how to fit into them**



included a Modern Warfare 3 tournament with a grand prize of \$1m. **Jeep** was a major sponsor, contributing cars to be driven through obstacle courses reminiscent of scenes in the game.

Games are increasingly the IPs with the biggest gravitational pull: brands need to learn how to create campaigns that fit into them, rather than the other way round. Look for deep brand activations around the upcoming launches of Halo 4, the rebooted Tomb Raider franchise, and inevitably the new Call Of Duty title, all due towards the end of the year.

As seen in: Call Of Duty MW3

## Key insights

- Gaming IPs are now vast, lucrative properties
- Brands need to develop sophisticated approaches to sharing their spotlight
- Understanding the game and its players is key.



## As seen in: Heineken Star Player

In 2010, 'two-screen' was little more than an empty buzzword on conference programmes. Now it's an entertainment mainstay.

TV is leading the way in showing that it's possible to capitalise on the increasing likelihood that people are accessing a second screen (laptop, tablet, smartphone) while watching something on the main screen.

Game shows have been the initial innovators, starting with **Million Pound**

**Drop**, and more recently **Red Or Black** and **The Bank Job**.

It's not yet clear if the TV components of these new shows will have much staying power. It may be that more integrated structures perform better.

The Dutch show **Intuition** had no studio contestants at all, and rewarded play-along home competitors with product vouchers (which increased in value if they invited other friends to play). What is clear is that the structure

of these experience is now well-established. Take-up has been strong, and a large mainstream audience is now familiar with the dynamics of playing while they watch. As show and game content improves, these experiences will become richer and more varied, and cross into other genres.

However, a key trend for 2012 will be two-screen experiences that weren't designed as hybrids, but where the digital content piggy-backs on existing content. **Picklive** was an early experiment here, encouraging players to play as they watched football matches, by picking tiny, instant 3-a-side fantasy teams, who would perform in the game according to how those players performed in the match. Heineken elaborated that idea in 2011 with **Star Player**, an iOS app which tasks players with answering trivia and predicting goals while they watch live on TV.

As we move into 2012, it's likely that the distinction between 'main' and 'second' screen will become less meaningful. The core issue, when designing, is to distinguish between the fundamental characteristics of big screens (usually communal and non-interactive) and small screens (usually private and deeply interactive) and target content accordingly.

**The structure of two-screen experiences is now well-established and take-up has been strong**

## Key insights

- Twin-screen is now an established format
- It's ready to move beyond gameshows
- It's not TV plus phone, it's communal plus private

Play has been a serious business for a long time. Educators, particularly, have always used games - digital or otherwise - to help their students learn. But 2011 was the year when serious games stopped being about making their players better and started being about making the world better.

The biggest breakthrough came in the shape of **Foldit**, a game which asks

players to solve puzzles based on the structures of complex proteins. The players get a rewarding puzzle game; the scientists get solutions to

puzzles that are notoriously difficult for computers to solve, but much more straightforward for the human brain. The challenge was always to find a way to get enough human brains to volunteer their time to work through these huge challenges. The solution was games: a diverting, rewarding structure that encouraged tens of

thousands of players to donate their time to the project.

The result was that over just 3 weeks in the middle of 2011, players of Foldit decoded the structure of a virus which causes AIDS in monkeys - a puzzle that had previously stumped scientists for 15 years.

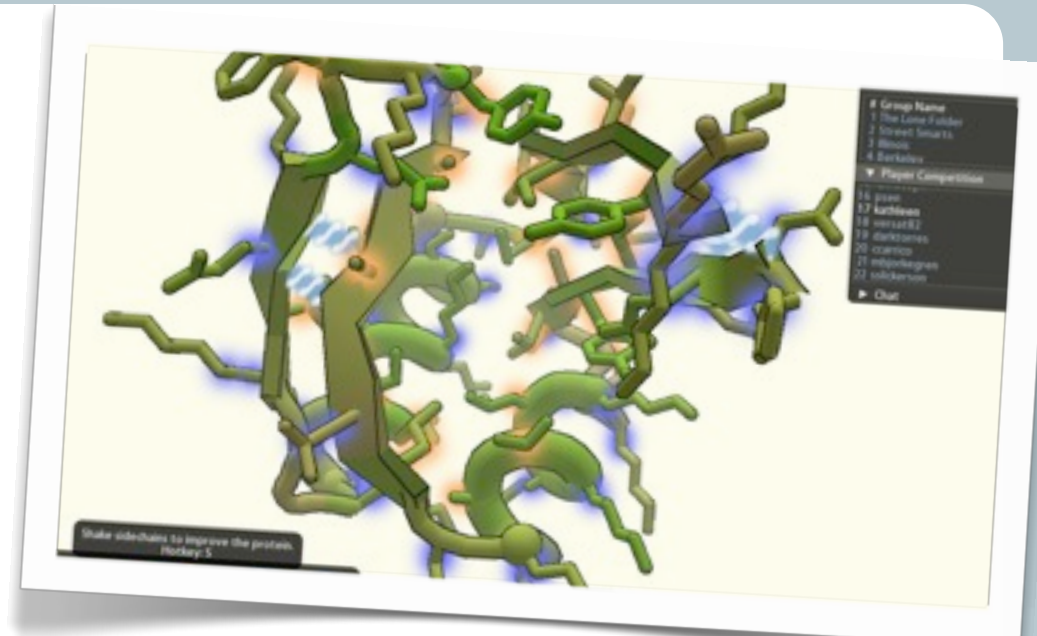
Rather than earlier distributed computing projects, like SETI and

Folding@Home, which ask people to donate their inactive computer time to automatically analysing data, these new projects hinge entirely on human input. From projects like **the Guardian MP's Expenses tool** to the **Zooniverse's**

science and humanities research project's, games are being used as the critical structure to motivate the public to tackle brain-intensive tasks.

Although often not games in their own right, these tools use game language and structures to build rewarding experiences for their players, and can

**Games provide a rewarding structure to encourage tens of thousands of players to donate their time**



often be dramatic and beneficial components within larger games. Hide&Seek partnered with the Milky Way Project to provide a play with purpose at the heart of **the campaign to launch the Green Lantern movie**: within the comic-book narrative, players were scanning the skies for traces of a colossal space battle. In reality they were helping NASA assess thousands of unclassified photos from the Spitzer space telescope. As more researchers and institutions make data-sets public, the scope for these kind of projects will increase rapidly in 2012.

As seen in: Foldit

## Key insights

- Serious games are generating real value
- Play is the perfect way to motivate and reward participation
- Players love knowing that they're making a real impact



## As seen in: Triple Town

If you look at the top-grossing iOS apps in almost any week, you'll see that the most common price point is - well, nothing. Much of the spend in the App Store is going to in-app purchases within free apps.

Freemium has taken hold as a dominant business model. You have to look no further than Nimblebits' huge hit **Tiny Tower** to see why. There's certainly enough of a game there to get sucked into the number-game (and

time management) of building a skyscraper, and, tantalisingly, always the hint that spending more "Tower Bux" would speed up your game. Tower Bux are earned slowly in gameplay - but can also be bought in bulk for cash prices. 100 Bux for £2.99 doesn't sound so expensive - especially when a player wants to see the results of their actions faster.

The appeal is obvious: players get so used to the effects of Tower Bux that

they can't be without them; the developer, gets a huge potential revenue stream. But it feels bolted on to the side of the game, rather than fitted into the game's mechanics.

Spry Fox's Facebook game **Triple Town**

points the way for a more nuanced approach to micropayments.

Triple Town, a spatial match-three puzzle game, has an internal economy based on *coins* - rewards the player receives in each game the play. Coins can be spent on strategically useful items, all of which might randomly appear in play anyway, but which sometimes are just useful to have *right now*. But coins can also be spent expanding the player's limited number of *moves*, which decrease during play and recharge each calendar day.

Of course, in-game coins can be purchased for Facebook Credits - and so players are encouraged to spend money not on speeding up dull tasks,

but on playing the game *more* and *better*; **they're paying to have more fun.**

**Players are encouraged to spend money on having more fun**

Triple Town is an antidote to cynical freemium games that bolt on payment models: its gameplay is

designed *around* micropayment, and in such a manner that players are, uncynically, embracing it. Expect to see smarter, sharper micropayment implementations in 2012.

## Key insights

- Freemium might not be a success strategy forever
- Don't just bolt payment onto the side of your game: design it into the core mechanics
- Players will pay if it makes the game more *fun*

# Going beyond Flash in the browser

In November, **Adobe announced it was abandoning development of mobile Flash.**

Many proclaimed this as a victory for Apple - whose iOS platforms don't support Flash in the browser. But in fact, more indicative of a growing trend: that web games in 2012 are taking place on

an increasing number of platforms.

Flash will always have a degree of

dominance in the desktop: it's very well-established. But it's not your only option for making rich games on the web - and in 2012, betting the farm on it feels increasingly risky. So much of the potential market for games is now viewing content on tablets, or phones - and there's only going to be more devices to choose from in the future.

So what are your options for making web games without Flash?

**Betting the farm on Flash feels increasingly risky**

**HTML5** is an update to the HTML spec, featuring new elements and APIs - most notably, the Canvas element for 2D graphics. "HTML5" is often used as a shorthand, though, for other technologies as well: CSS3 and modern Javascript, all used together to make rich, interactive websites without Flash.

And because HTML5 is "just" the web, it works fine on iOS and Android browsers.

You can see the scope for HTML5 in **Cut The Rope**

(for Internet Explorer 10). This is an extreme example of HTML5's capabilities, but expect to see more games of this calibre as developers master the technology.

**Unity** is becoming ever-more popular. In the browser, it requires a plugin (just like Flash) - but offers rich, impressive 3D games. And it's possible to publish from Unity not only to the web, but to PC and Mac, iOS and Android, and even home consoles.



## Chrome's Native Client Software Development Kit

is another new technology on the block. Built into Chrome, it allows developers to write applications in C or C++, and supports full 3D and direct memory access. This makes porting existing console or iOS titles to the browser relatively easy - and opens the door for the richest, smoothest, and most impressive experiences of any of the technologies listed here. For a great standard-bearer for this, check out Supergiant Games' port of their hit **Bastion**.

As seen in: Bastion for Chrome

## Key insights

- Flash is not the only solution for rich, web-based games
- Pick the right platform for your audience and project
- Consider getting experience in other technologies to stay up-to-date.

If that's whetted your appetite to learn more, we're pleased to offer a range of consultancy packages to suit your availability and budget.

### **Trends in gaming - setting your strategy for 2012**

A half-day seminar with one of Hide&Seek's lead designers, based on the *Ten, Eleven, Twelve* document, exploring the themes covered in more detail, followed by an extensive Q&A session.

*Cost indication:* £1k

### **Game / product / service evaluation**

If you're already at work on game ideas, our design team can spend a day understanding your brief and helping ensure your execution takes into account best current thinking, ensures you get the impact you want, and connects you with the right design and production partners.

*Cost indication:* £3k – £8k

### **Introduction to game design**

A one-to-two day interactive workshop with a Hide&Seek creative director. We'll explore key principles, look at some detailed examples, work through a number of creative challenges, and give your team an immersive experience that leaves them confident and well-versed in what it takes to commission, produce and deliver great games.

*Cost indication:* £6k - £10k

To book a session and discuss your needs in more detail please drop Alex Fleetwood, Hide&Seek's Director a line at [alex@hideandseek.net](mailto:alex@hideandseek.net) or call him on 020 7242 3706.

**Hide&Seek**  
*Inventing new kinds of play*

5 Hatton Wall  
London  
EC1N 8HX

020 7242 3706  
[hello@hideandseek.net](mailto:hello@hideandseek.net)