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Understanding the global players of hybrid genre games

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Foreword

Mobile games are a fast-moving market. In App Annie's 2020 State of Mobile report, mobile games are on track to surpass \$100B across all mobile app stores in 2020.

As more gamers download, play, and spend money on mobile games, developers are also looking for new and innovative ways to attract players. In this report, we wanted to understand "hybrid genre games", which have risen 7x faster in consumer spend compared to the average mobile game in the global market.

Hybrid genre games combine multiple design elements from different genres, creating a mixed gameplay experience. We talked to players globally to understand what attracted them to these games, what kept them playing, and how game developers might be able to monetize hybrid genre games effectively.

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Hybrid genre games in this research* grew

faster in consumer spend compared to benchmark (comparing H1 2020 vs the H1 2019)

* The comparison is based on year-over-year growth of 15 hybrid genre games, which have consumer spend records since Jan 2019, out of 38 games covered in the study. Combined iOS and Google Play,

 \checkmark



Worldwide (iOS only for China).

^{*} The 38 games are identified through desktop research and expert review for the study but not according to any defined category on Google Play or App Annie. Source: Ăpp Annie Intelligence.

What are hybrid genre games?



The study covers 38 hybrid genre games, including Gardenscapes, MARVEL Puzzle Quest, Coin Master, Empires & Puzzles, Disney Frozen Adventures, Arknights, Warship Legend: Idle Captain, Matchington Mansion, Archero, LINE HELLO BT21, AFK Arena, Lily's Garden, Fishdom, Merge Dragon, Brawl Stars, Hay Day Pop, Top War, Shop Titans, Word Villas, Merge Magic!, Idle Life Sim, Random Dice: PvP Defense, Art of War: Legions, Trivia.io, Best Fiends, Knighthood, Combat of Hero, RollerCoaster Tycoon® Story, Towerlands, Block Puzzle - Woody 99, Words Out, Small Town Murders, Property Brothers Home Design, Idle Mafia, Hotel Empire Tycoon, Evil Apples.

Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020.

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Successful hybrid genre games achieve:

- An organic combination of two or more different genres of gameplays in one
- Simple controls that are easy-to-learn but hard-to-master
- Bite-size but immersive session experience

We wanted to understand what made players drawn to the top hybrid genre games globally. We selected 38 games based on their downloads and revenue globally.



Research scope and methodology



Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020.

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Executive Summary



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- Gamers have natural affinities to certain genres of gameplay. They tend to look for hybrid genre
- Word-of-mouth, app store, and online video are the most common channels for discovering hybrid
- Hybrid genre games keep players engaged with diverse gameplay, striking a balance between being
- They also address the key pain-points for why players often churn: repetitive gameplay, and pressure
- There's a common misconception that introducing rewarded ads hurts paying player experience. We found that paying players were more accepting of rewarded ads compared to non-paying players,
- According to hybrid genre players, optimal placement for rewarded ads are either at the beginning or



I started playing because I really enjoy fighting games. But it doesn't feel like a typical thing. You don't have to hit a bunch of buttons.

- Action-based hybrid gamer

Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020.



How gamers discover hybrid genre games





Discovery

The path to download is a three-stage journey, with online video, word-of-mouth, and app stores as top channels



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Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020.

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Discovery

Different channels play different roles depending on the stage of discovery



80

G3. How do you usually find out about/ discover new mobile games to download? G4. Where do you get the information that you rely on when deciding to download a game? Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020. **Base:** Hybrid genre gamers n= 1209

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Hybrid genre gamers prefer games that are consistent with their main genre preferences

Hybrid Genre Gamers' Existing Genre Preference



G6b. Which types of game do you play most often?

Discovery

Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020. Base: Action-based hybrid games n = 85, Strategy-based hybrid games n = 66, RPG-based hybrid games n = 365, Puzzle-based hybrid games n = 611 and Simulation-based hybrid games n

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Discovery

Hybrid genre games attract gamers with their simple and flexible design





QHBG3. Which of the following factors motivated you to download [the hybrid genre game]? Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020. Base: Action-based hybrid games n = 85, Strategy-based hybrid games n = 66, RPG-based hybrid games n = 365, Puzzle-based hybrid games n = 611 and Simulation-based hybrid games n = 354

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Triggers to DOWNLOAD hybrid genre games - Top 3







Aside from just the match three puzzle, you actually start to build stuff and see what you're doing. It makes me feel accomplished.

- Puzzle-based hybrid gamer

66

Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020.

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Unlocking player engagement for hybrid genre games





Hybrid genre games effectively address top pain-points for why gamers stop playing a game

Hybrid genre games vs mobile games in general
-7pp
-9pp
-5pp
-9pp
-9pp

QHGB5/G10 Thinking about the design of the game, what are the potential reasons that you may uninstall/stop playing [the hybrid genre game] / games [in this category]? Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020. **Base:** Hybrid genre gamers n= 1209

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Action-based hybrid gamers like how relaxing and visually appealing the games are but still offer a challenge



• Hybrid genre games significantly address pain points for gamers

QHGB5/G10 Thinking about the design of the game, what are the potential reasons that you may uninstall/stop playing [the hybrid genre game] / games [in this category]? QHGB4/G9 What keeps you playing [the hybrid genre game] / games [in this category]? Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020. **Base:** Action-based hybrid gamers n = 85, Action gamers n = 144

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Action-based hybrid games

5	Action-based hybrid games: Driver to continue playing	Action-based hybrid games vs Action games
	Simple and easy to progress	+5pp





Strategy-based hybrid gamers seek multiplayer challenges without the pressure of in-game purchases



Strategy games: Top reasons to churn	Strategy-based hybrid games vs Strategy games	Strategy-based hybrid games: Driver to continue playing	Strategy-based hybrid games vs Strategy games
Pay to progress / win	-4pp	Friends and family are playing with me	+11pp
Too difficult to pass	-5pp		
Hard to navigate	-5pp	Allows me to connect with others	+10pp

QHGB5/G10 Thinking about the design of the game, what are the potential reasons that you may uninstall/stop playing [the hybrid genre game] / games [in this category]? QHGB4/G9 What keeps you playing [the hybrid genre game] / games [in this category]? Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020. **Base:** Strategy-based hybrid gamers n = 66, Strategy gamers n = 98

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Strategy-based hybrid games





RPG-based hybrid gamers enjoy simplified gameplay with a strong sense of achievement



RPG games: Top reasons to churn	RPG-based hybrid games vs RPG games	RPG-based hybrid games: Driver to continue playing	RPG-based hybrid games vs RPG games
Getting repetitive	-14pp	I am doing well in the game	+10pp
Too difficult to pass	-8pp		
Pay to progress / win	-1pp	Easy to navigate	+9pp

• Hybrid genre games significantly address pain points for gamers

QHGB5/G10 Thinking about the design of the game, what are the potential reasons that you may uninstall/stop playing [the hybrid genre game] / games [in this category]? QHGB4/G9 What keeps you playing [the hybrid genre game] / games [in this category]? Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020. **Base:** RPG-based hybrid gamers n = 365, RPG gamers n = 126

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RPG-based hybrid games





With balanced difficulty, puzzle-based hybrid gamers like to immerse in content and gameplay



Puzzle games: Top reasons to churn	Puzzle-based hybrid games vs Puzzle games	Puzzle-based hybrid games: Driver to continue playing	Puzzle-based hybrid games vs Puzzle games
Too difficult to pass	-14pp	Curious about what will	. 700
Pay to progress / win	-14pp	happen next	+7pp
Too easy / no challenges	-14pp		

• Hybrid genre games significantly address pain points for gamers

QHGB5/G10 Thinking about the design of the game, what are the potential reasons that you may uninstall/stop playing [the hybrid genre game] / games [in this category]? QHGB4/G9 What keeps you playing [the hybrid genre game] / games [in this category]? Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020. **Base:** Puzzle-based hybrid gamers n = 611, Puzzle gamers n = 231

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Puzzle-based hybrid games





Simulation-based hybrid gamers appreciate high quality graphics and clear layout for easy navigation



Simulation games: Top reasons to churn	Simulation-based hybrid games vs Simulation games	Simulation-based hybrid games: Driver to continue playing	Simulation-based hybrid games vs Simulation games
Pay to progress / win	-8pp	Easy to navigate	+7pp
Low quality graphics	-13pp		TPP
Hard to navigate	-12pp		

• Hybrid genre games significantly address pain points for gamers

QHGB5/G10 Thinking about the design of the game, what are the potential reasons that you may uninstall/stop playing [the hybrid genre game] / games [in this category]? QHGB4/G9 What keeps you playing [the hybrid genre game] / games [in this category]? Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020. **Base:** Simulation-based hybrid gamers n = 354, Simulation gamers n = 112

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Simulation-based hybrid games





The engagement level is similar across different types of hybrid genre games

Hybrid genre game times per week - average times



On average 7.6 times per week

QHBG1. How frequently have you been playing [the hybrid genre game] in the past 6 months? QHBG2. On average, how long do you play [the hybrid genre game] for? Source: Kantar-Google Hybrid Games Project July 2020 Base: Action-based hybrid games n = 85, Strategy-based hybrid games n = 66, RPG-based hybrid games n = 365, Puzzle-based hybrid games n = 611 and Simulation-based hybrid games n

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Hybrid genre game time spent / session - average length

Action-based hybrid

RPG-based hybrid

Strategy-based hybrid

Puzzle-based hybrid

Simulation-based hybrid



On average 27 mins

= 354







It's not a free reward, it is me giving them my time instead of my money and getting something in return. - Puzzle-based hybrid gamer

Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020.



Increasing player investment in hybrid genre games





Although average play time is similar across genres, Strategy- and RPG-based hybrid gamers have higher average spend

Action-based hybrid game

Strategy-based hybrid game

RPG-based hybrid game

Puzzle-based hybrid game

Simulation-based hybrid game

QIA2 Approximately how much have you spent on in-app purchases in [the hybrid genre game]? Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020. Base: Action-based hybrid games n = 30, Strategy-based hybrid games n = 31, RPG-based hybrid games n = 165, Puzzle-based hybrid games n = 210 and Simulation-based hybrid games n = 116

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Average spend of paid users





20





Hybrid genre game payers use in-app purchases to achieve more exclusive and exciting experiences

Top 3 IAP motivations

(S) Investment

1. In game items	28%
 To get rare / exclusive characters and accessories 	28%
3. In-game currency	27%

QIA3 What have you bought from in-app purchases in [the hybrid genre game]? Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020. **Base:** Hybrid genre game payers n = 467

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⁶⁶ I make in-app purchases when I know the game is going to be more exciting with it. **99**

- RPG-based hybrid gamer, payer







(S) Investment

Rewarded ads are valuable to gamers because they speed up in-game progress

Top 3 Reward ad motivations

1. To gain more lives/ energy	33%
2. To gain more in-game currency	30%
3. To progress quicker in the game	28%

QRA3. Why do you watch in-game rewarded ads in [the hybrid genre game]? Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020. **Base:** Those who watched rewarded ads n = 797

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⁶⁶ I don't think the advertising rewards affect my game play time. It's not that influential. But if you want to be good at this game you would always watch the ad because every gem counts. **99**

- Puzzle-based hybrid gamer, payer





(S) Investment

Paying users are more likely to have watched rewarded ads

Payers

who have watched rewarded ads



QRA1. Have you watched rewarded ads in [the hybrid genre game]? Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020. Base: Hybrid genre game payers n =467 and hybrid genre game non-payers n =702

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Non-payers

who have watched rewarded ads





Rewarded ads add value to paying users' in-app purchases, while increasing retention of non-payers

Top drivers to watch Rewarded ads for payers

1. To gain more game currency

(S) Investment

- 2. To gain more lives/ energy
- **3.** To receive or unlock a special item
- 4. It gives me more than what I can accomplish in the

5. To get an in-app purchase discount

QRA3. Why do you watch in-game rewarded ads in [the hybrid genre game]? Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020. Base: Hybrid genre game payers who have watched rewarded ads n= 377 and non-payers who have watched rewarded ads n= 400

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Top drivers to watch Rewarded ads for non-payers

	1. To gain more lives/ energy
	2. To progress quicker in the game
	3. To gain more game currency
e game	4. To receive or unlock a special item
	5. To save me time





Strategy-based and RPG-based hybrid gamers are more open to watching longer rewarded ads



Significantly higher than average hybrid genre games

QRA6 What is the maximum length of a reward ad that you would watch in [the hybrid genre game]? Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020. Base: Action-based hybrid games n = 85, Strategy-based hybrid games n = 66, RPG-based hybrid games n = 365, Puzzle-based hybrid games n = 611 and Simulation-based hybrid games n = 354

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Acceptable length of a rewarded ad by hybrid genre game types







Strategy-based hybrid gamers accept more rewarded ads per session

Acceptable number of rewarded ads by hybrid genre gamers

* in 10-min game play time, assuming each ad is of 30s

Action-based hybrid gameStrategy-based hybrid gameRPG-based hybrid gamePuzzle-based hybrid gameSimulation-based hybrid game

Significantly higher than average hybrid genre games

QRA7 What is the maximum number of 30-second rewarded ads you would watch in a 10 minute period in [the hybrid genre game]?
Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020.
Base: Action-based hybrid games n = 85, Strategy-based hybrid games n = 66, RPG-based hybrid games n = 365, Puzzle-based hybrid games n = 611 and Simulation-based hybrid games n = 354

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(S) Investment

Rewarded ads shouldn't interrupt gameplay. Offering them at scenarios like completion or revival can help boost retention

Expected placement of rewarded ads



QRA2 Ideally, where would rewarded ads best be placed in [the hybrid genre game]? Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020. Base: Action-based hybrid games n = 85, Strategy-based hybrid games n = 66, RPG-based hybrid games n = 365, Puzzle-based hybrid games n = 611 and Simulation-based hybrid games n = 354

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(S) Investment

Gamers most commonly expect in-game energy and currency for rewarded ads



QRA8 What would you expect to receive from a 30 second in game reward ad in [the hybrid genre game]? Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020. Base Hybrid Gamers: n=1209. Base: Action-based hybrid games n = 85, Strategy-based hybrid games n = 66, RPG-based hybrid games n = 365, Puzzle-based hybrid games n = 611 and Simulation-based hybrid games n = 354

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Methodology





Research approach

Stage 1: Gamer Interview

Research objectives

- Learn about the experience of gamers discovering hybrid genre games and continuing to invest in the games
- Understand gamers' motivations, needs and satisfaction in hybrid genre games
- Understand how gamers value in-app purchase and rewarded ads

Research methodology

1 hour in-depth interview with 6 hybrid genre gamers respectively in the US and Korea markets.

Respondents qualification

- Aged 18-49
- Weekly mobile gamers
- Have played hybrid genre games for more than 6 month
- Not mind rewarded ads

Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020. Base: Hybrid genre gamers n= 1209

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Stage 2: Gamer Survey

Research objectives

- Compare the motivations, needs and satisfaction of different types of hybrid genre gamers
- Depict gamers' perceptions and attitudes towards the hybrid monetization model
- Clarify gamers' expectations for rewarded ads

Research methodology

~300 online surveys collected respective in the US, Germany, Korea, Japan markets, adding up to 1209 responses.

Respondents qualification

- Aged 18-49
- Weekly mobile gamers
- Played 1 hybrid genre game at least







Rethodology

Respondent profile



S2. Age; S3. Gender; QD4 Personal Income; S6. Gaming Frequency; S7.In app spend; QD3 Household Source: Google Hybrid Genre Gamer Insights Report, executed by Kantar Australia, US/DE/KR/JP, June 2020. Base: Hybrid genre gamers n= 1209

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