



Scoring with H5 Gamers

How game developers can reach new players, retain existing ones, and monetize more effectively

KANTAR Google

Foreword

Taking pole position as one of the **most easily accessible gaming formats**, while transcending platforms, age groups and genders — the H5 game market is ripe for future growth in the next five years and beyond.

With the global H5 market projected to reach [US\\$3.09 billion by 2028 \(up from US\\$1.03 billion in 2021\)](#), there is vast untapped potential in the H5 gaming market for game developers. This includes unlocking new audiences, increasing user retention, deepening engagement and effectively monetizing new products with thoughtful, well-placed advertising.

There is a significant opportunity to be realized. The only question is: how?

H5 gamers are a diverse but distinct audience; made up of people who take gaming seriously, as well as those who value H5 games as a no-strings-attached pastime for small moments in their lives. Like any audience, H5 gamers have clear reasons for playing, continuing to play, and preferences around how they engage with both game and advertising content.

Google and Kantar partnered to explore three important export markets for APAC developers - the USA, India and Brazil. **This is a first-of-its-kind report which paints a detailed picture of H5 gamers, as well as the current and emerging market opportunities of note.** This research has been distilled into five core insights, with corresponding actions for game developers and publishers looking to capitalize on this exciting new opportunity.

With this report, we aim to provide a window into the H5 gaming audience, so that H5 game developers and publishers can create better playing experiences, more effective ad monetization strategies, and realize incremental revenue opportunities for years to come.

Game on!

Nitin Gajria

Managing Director, APAC Sellside Monetization, Google



Markets covered



India



Brazil



USA

This research deep dives into 3 types of gamers

'H5 Gamers' surveyed in this report are those who have played HTML5 form of online games in June 2023. HTML5 games mentioned in this report refer to games which do not require downloading but can be played within a gaming website, or within a non-gaming website/app.

Serious gamers

H5 gamers that also play other games (e.g. apps and console) and spend more than 7 hours a week playing games

Light gamers

H5 gamers that also play other games (e.g. apps and console) and spend less than 7 hours a week playing games

Pure gamers

Play H5 games only

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Insight 1:

**H5 gamers aren't
who you'd expect**

The first thing to know about H5 gamers is that they're just regular gamers. In fact, **42% of all gamers played H5 games in June 2023** - which is almost on par with PC Games (48%) and console games (47%).



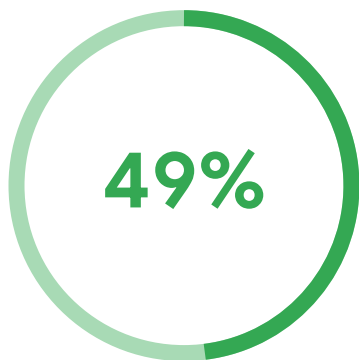
of online gamers have
**played an H5 game
over the past 1
month**

But the H5 gamer goes much further, encompassing a vast range of ages, game preferences, and experience levels. So, trying to envision the average H5 gamer is more complex and varied than might initially meet the eye.



Demographic of H5 gamers

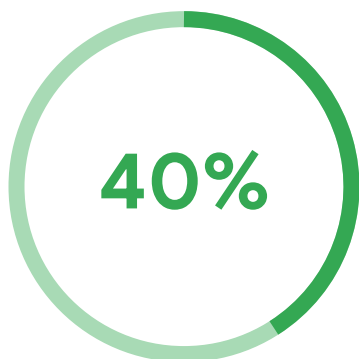
A majority (49%) of H5 gamers are serious gamers, often male-skewed, who spend more than seven hours a week playing both H5 and non-H5 games. The remainder of the demographic is split up between light gamers (40%), and pure H5 gamers (11%).



Serious gamers

H5 gamers that also play other games and spend more than 7 hours a week playing games

- Skew towards younger males
- Play across multiple devices (mobile, PC, console)
- Fast pace gameplay, variety of games
- Seek out variety across all types of gameplay



Light gamers

H5 gamers that also play other games and spend less than 7 hours a week playing games

- Skew slightly towards females
- Even split between young and old (+/- 35yrs)
- Favorite game types are puzzle, word and strategy
- Half prefer their smartphone for H5 gaming
- Interested in upskilling, getting to next level



Pure H5 gamers

Play H5 games only

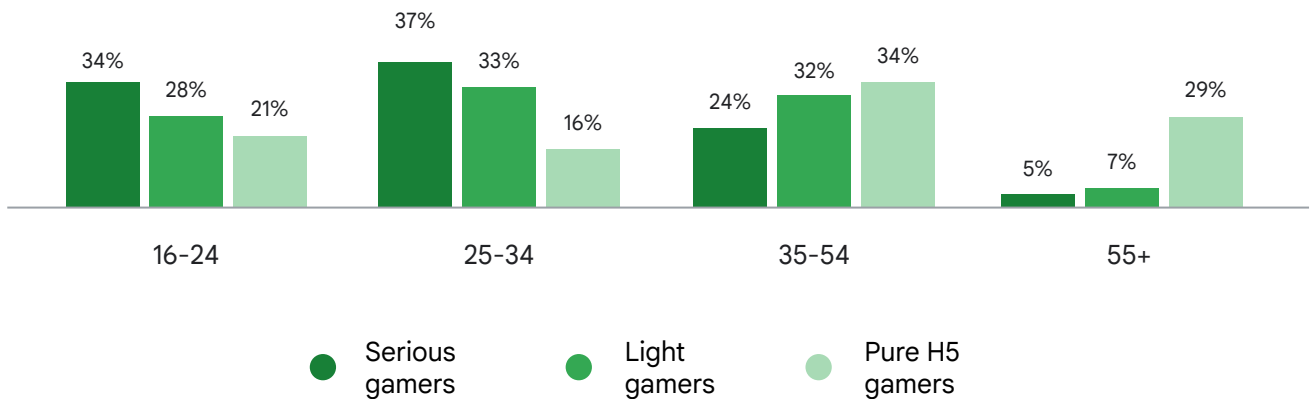
- The majority play 0-3 hours a week
- Play both on gaming and non-gaming websites / apps.
- Play 2-3 games on average - card, puzzle, and word are their preferred game types.
- Fun, light hearted, not competitive



Over half of serious and light gamers play H5 games at least once a day

When we explore H5 gamer segments by age, we can see that while H5 is enjoyed across all age groups, their gaming preferences differ. Serious gamers are prevalent within the 16-34 age range, light gamers are fairly consistent across the 16-54 demographics, and it starts to skew towards pure gamers at the 35+ demographic, - dominating the 55+ demographic.

H5 gamers profile by age distribution





Easy access to H5 games makes them a popular option for young and old alike. Older demographics particularly value the ability to **play without the perceived time and financial commitment** of console or PC gaming.

When it comes to the types of H5 games they like to play, it's clear that serious gamers are just that - serious! They prefer genres that are renowned for immersive gameplay and require action and precision. Light and pure gamers? They're happy to keep it casual with genres like puzzle and word games.

Preferred H5 game genres by gamer types

Serious gamers

Strategy	33%
Action	32%
Adventure	32%
Puzzle	32%
Arcade	31%
Casual	31%

Light gamers

Puzzle	31%
Word	28%
Strategy	27%
Racing	27%
Card	26%

Pure H5 gamers

Word	25%
Card	25%
Puzzle	24%
Casual	19%
Casino	17%



How you can level up: Play smarter, not harder

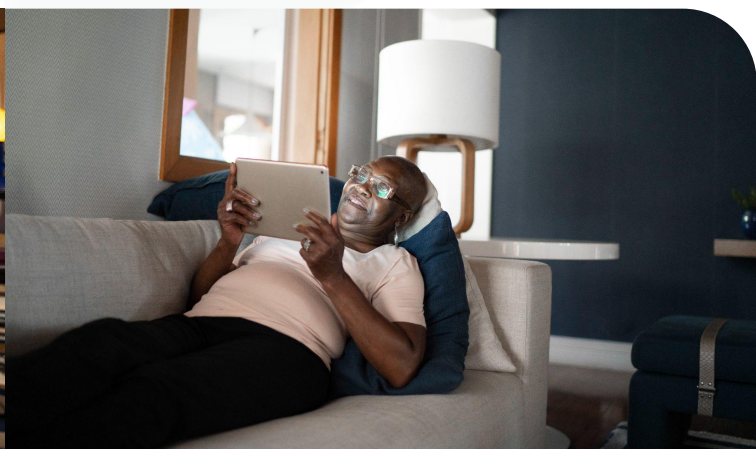
Understand player preferences to design games that unlock new audiences.

The low barrier to entry that H5 games offer makes them appealing to new and established gamers, both young and old. However, the **different player demographics have different expectations about what the gaming experience should entail**, so it's important that game developers cater to those expectations in order to unlock the audience segment they're targeting.

Leverage H5 games to better reach existing players, and new untouched segments.

By making H5 versions of games available, game developers can **drive attention and engagement from core player groups** (serious and light players who play across different game types like console and apps, as well as H5), subsequently **diversifying and strengthening their market position**.

Game developers and publishers entering the world of H5 games can also begin to **tap into previously untouched segments** (like pure H5 gamers) that may otherwise be impossible to penetrate with other forms of games. And with **more than half (54%) of pure gamers saying H5 games help them understand more about the types of games they enjoy**, H5 games are a great way for game developers looking to expand their audience.





Insight 2:

**Think cross-device,
cross-platform**

With an **average of more than 3 connected devices per person across APAC**, people have an expectation that they should be able to access the internet on any device, at any time. They are constantly transitioning between smartphones, laptops and tablets - and they want a great gaming experience on any device.

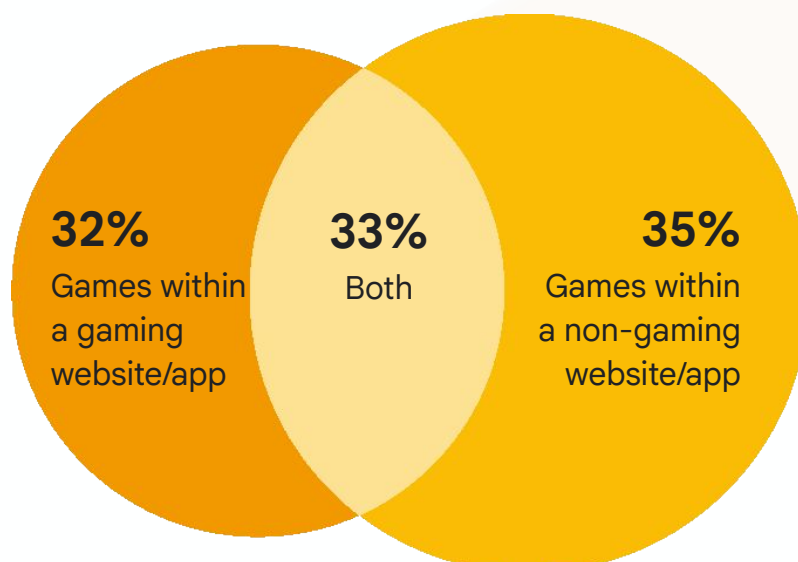
While mobile continues to be a popular device with 65% of respondents playing H5 games on smartphones, H5 gamers particularly prefer the precision and control of playing on desktop, which they find useful in more technical games.



42% play H5 games on their laptops, while 33% play on desktop - figures that are surprisingly high in what is often considered to be a mobile-dominant market.

On top of that, H5 gamers are platform agnostic - if you've got the games, they're willing to play. And while 32% play on dedicated H5 sites, 35% play on non-gaming sites, and 33% play on both.

Games played in the past one month





How you can level up: Win through optimization and diversification

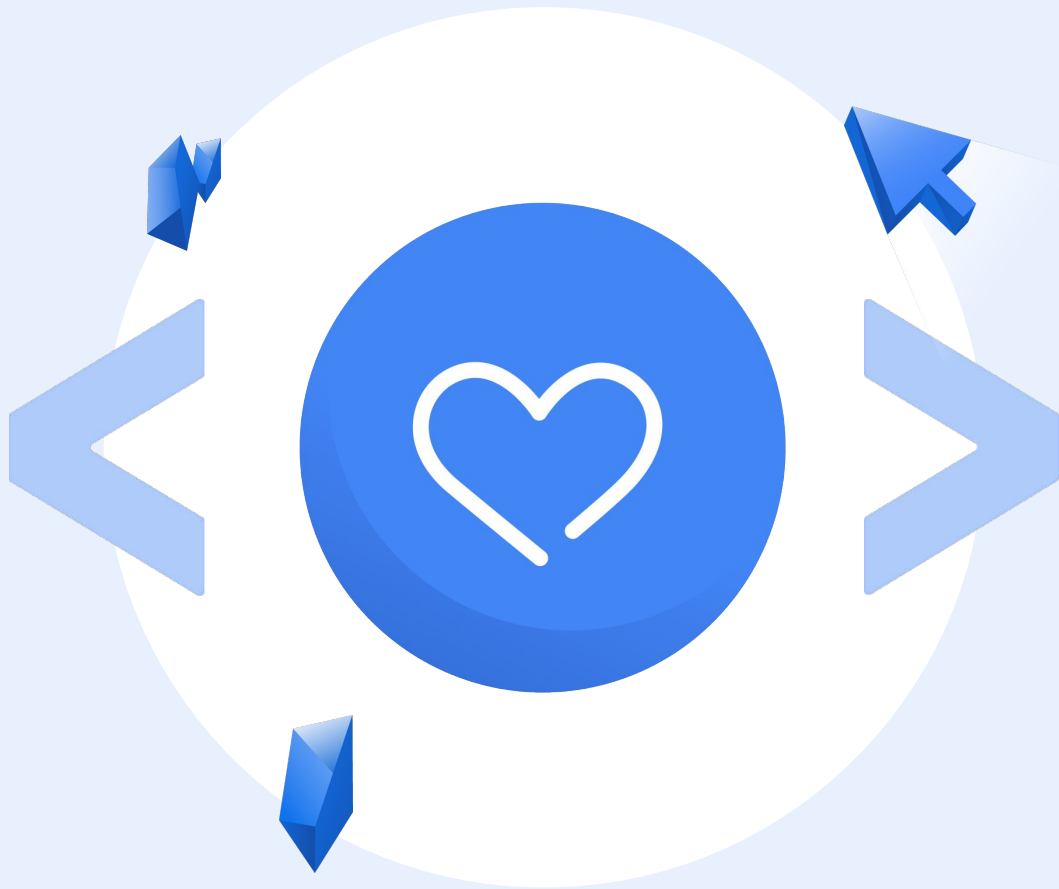
Optimize for different device types

For every audience, H5 games are a great way to encourage further exploration into the gaming world. That means providing a great experience for different device types and platforms, is a great way to expand your audience. Not only will you acquire single-device players that you might not have reached before, you'll be able to cater to players who enjoy playing across multiple devices. **Ensure your games and ads are designed and optimized on different devices**, so that players will get a great experience, whether they are enjoying your H5 game on a smartphone, laptop, or tablet.

Diversify revenue by providing game content to other publishing platforms

Additionally, there is significant opportunity to grow revenue streams online. Aside from establishing your own H5 gaming website and expanding your business through user acquisition and ad monetization, gaming publishers can also provide game content to other publishers and share earnings.

You can do this by **distributing your game on other game publishing platforms**, or **integrating your games on non-gaming platforms**, such as news websites and social media apps that are interested in featuring games on their site. To optimize distribution, consider using [H5 Games Ads](#). It seamlessly integrates with [AdSense for Platforms](#) and lets you earn a share of the ad revenue collected when your game is integrated into a site.



Insight 3:

**Safe and relaxing
gaming attracts players**

People turn to H5 games in all the little moments of their lives. They start playing because it's convenient and easy - and by taking a considered approach to user experience, game publishers can ensure any barriers to entry are minimized or removed entirely.



Across all segments, the top two reasons players start H5 games is because they **find the games relaxing**, and it **provides opportunities for socializing and immersion**.

H5 games are a great way for gamers to relax, escape, and fill in the micro breaks in their daily lives. In fact, relaxation is the top trigger for playing - but is closely followed by socializing and immersion. This motivation dovetails with players' appreciation of ease of access and no download requirements to indicate that players value H5 games' ability to provide them with a bit of fun - whenever that desire strikes them.

Why they play



76%

Relaxing & escaping



63%

Socializing and immersion



51%

Low effort



45%

Achievement

But just as people have clear reasons to play, there are also clear barriers that can turn them away. Safety and privacy are high on the list of must-haves for H5 gamers - so **it's not enough that a game is safe, it has to *feel* safe as well**. Gaming sites that feature too many ads, or have constant pop-ups can easily be perceived as phishing or malware sites.

Barriers to starting new games



30%

Too many ads



25%

H5 game sites
could have viruses

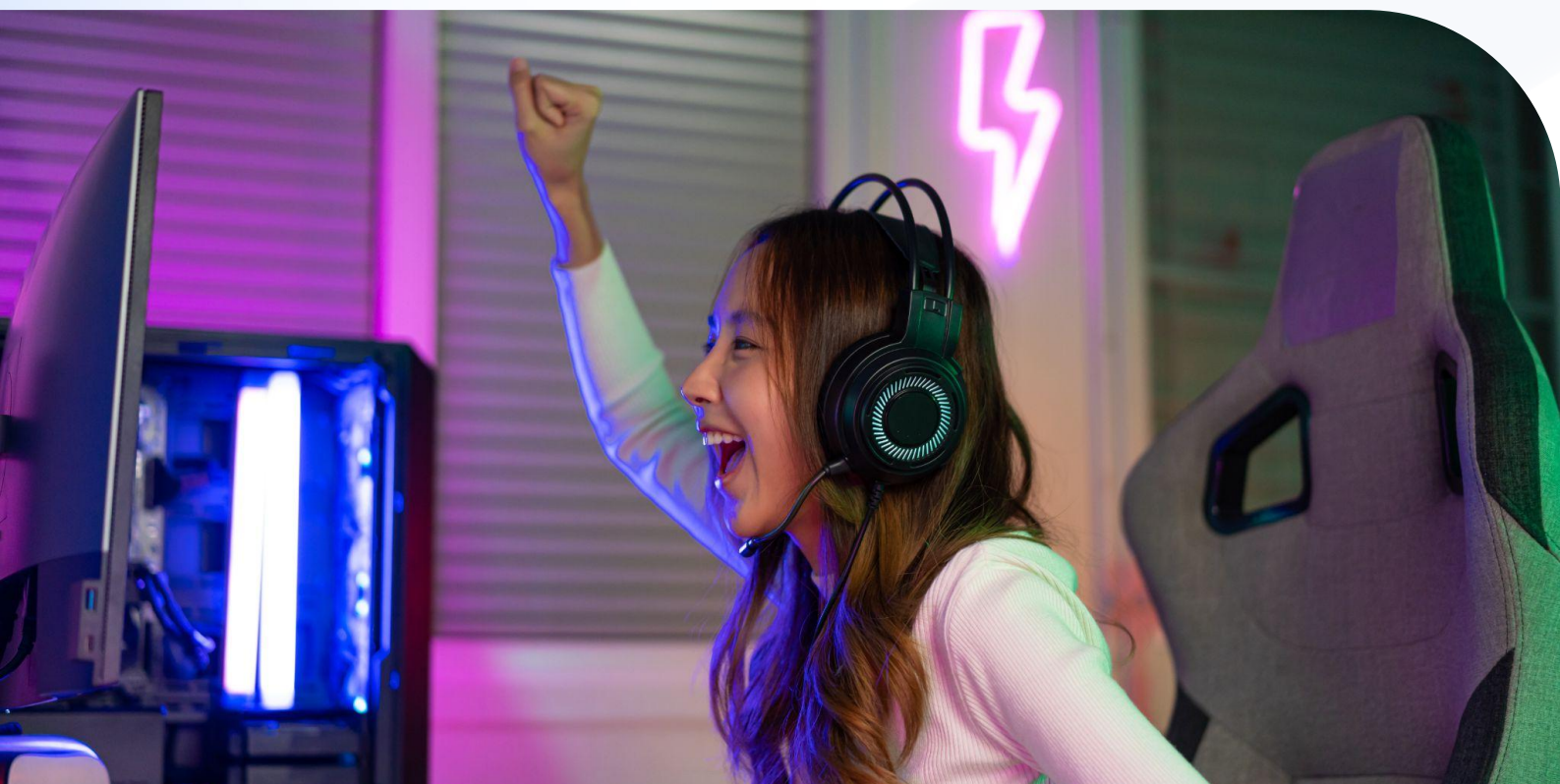


22%

My personal information
could be compromised



While the excessive appearance of ads can be a deterrent, this does not mean gamers will not play a game if it has ads. **In fact, 58% say they don't mind ads if they are relevant, indicating that the key to ad engagement lies in a thoughtful approach.**





How you can level up: Accessibility and ease are the name of the game

If we look across the reasons gamers play H5 games, we can bring it back to one fundamentally human driver: H5 games bring them joy. H5 games start as an easy way to unwind and relax and can fit into any spare moment people have, but they become valued as an immersive and challenging pastime.



For game developers looking to acquire new players, the key is to make games **easily available** in all the little moments, and **remove barriers to gameplay** wherever possible.

H5 gamers also value safety, and you can **balance this sense of safety with a thoughtful ad strategy** by following some **user experience best-practices**:

- Ensure content is the primary focus of the page, and adds value
- Minimize pop-ups to those that are absolutely necessary
- Keep the number of ads in balance with the content you're serving
- Give players a chance to play your games before serving ads
- Ensure ads appear during breaks in gameplay, with at most only one pre-roll ad before the game loads



Insight 4:

Immersive gameplay leads to more engaged players

The reasons that gamers keep playing games differ slightly from the reasons they start playing games. Immersive gameplay (they feel engaged), connection, and a sense of achievement rank highly among the motivations to stick with a game.

Why they stay



74%

Immersive gameplay



57%

Connection



54%

Achievement



36%

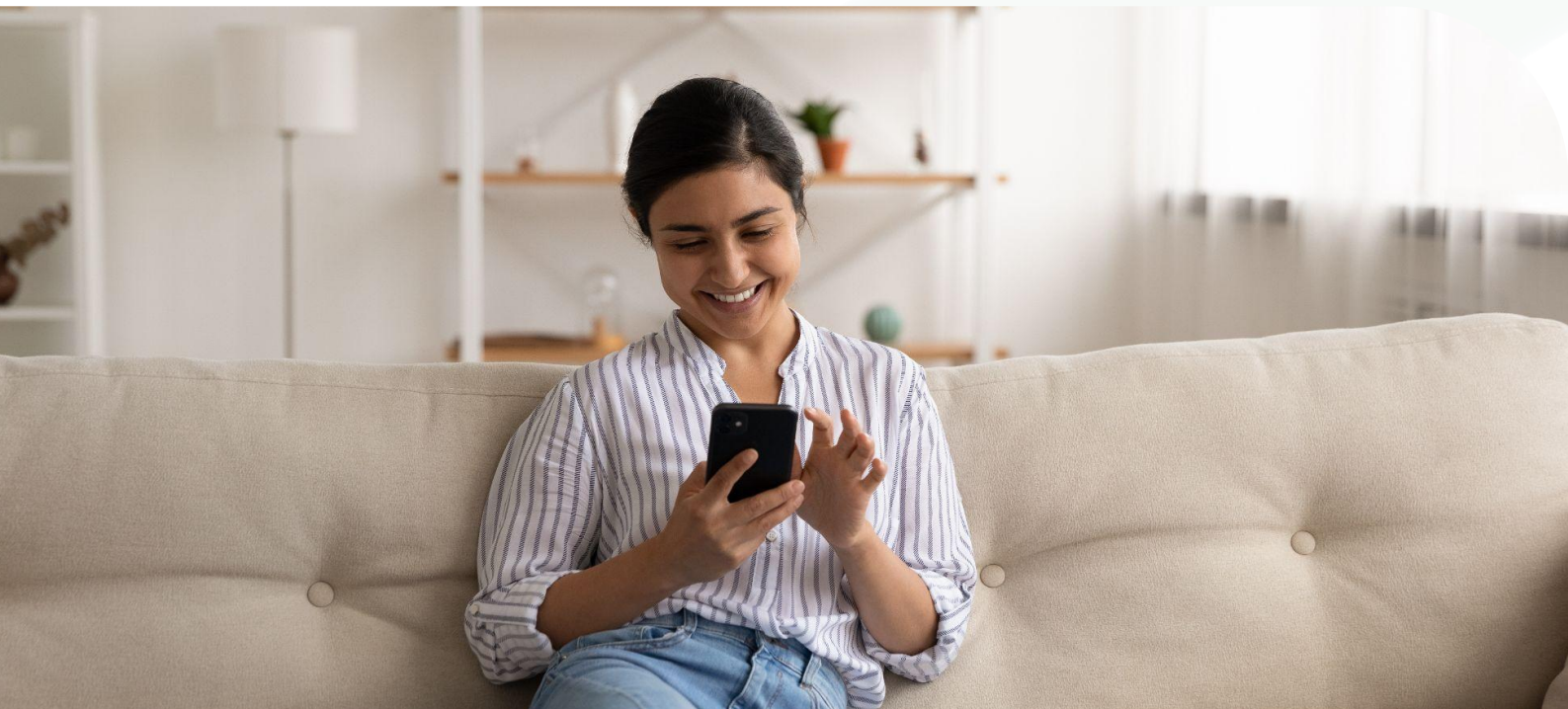
Easy to jump in and jump out

The more they play, the more likely they are to stay - and the more likely they are to want to extend their gaming journey. 71% of all gamers are more likely to download an app game, and 66% will start to explore other games and platforms after a great H5 gaming experience.



71%

of all gamers will happily download an app version of the game if they enjoy it





How you can level up: Prioritize player experience

For those looking to retain players, consider how games can be made more engaging, and how you can ensure players have a sense of progression during gameplay. This ranges from in-game tactics such as bonus levels, leaderboards and retention of scores; to out-of-game tactics like community building, and encouraging knowledge sharing between players.



The more game developers can **create engaging H5 games and a supportive game community**, the more likely gamers are to stay for longer, and extend their journey beyond H5 games.





Insight 5:

Grow engagement through thoughtful ads

Across all gamer segments, ads are a widely accepted part of the ecosystem. Most gamers are happy to interact with ads, when they are presented in a format or at a time that does not feel too invasive. This is great news for game developers because it means that minimizing interruptions to the gaming experience can reduce any detrimental effects on engagement.



Most gamers are happy to interact with ads, when they are presented in a format or at a time that does not feel too invasive.

Players have clear preferences around the types of ads they interact with - and they want the reward for watching. Players will happily interact with ads that grant them in-game rewards (such as power-ups), or those that will extend their gameplay (such as unlocking new levels or granting them extra lives).



70%

Will watch an ad if it give them
in-game rewards



64%

Are more accepting of ads
that extend gameplay

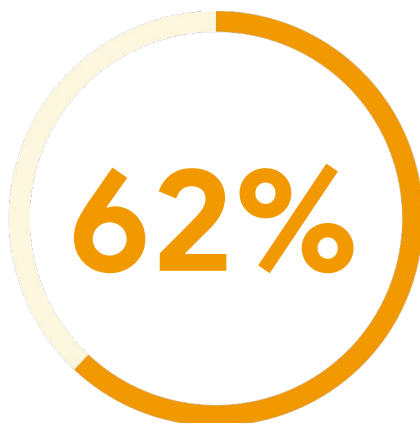
Relevance is also a key driver of engagement, with 62% of gamers agreeing that they would take action by clicking, when presented a relevant ad. Gamers also value novelty - with a preference towards seeing variety in the ads that they are served,.

“ It’s always the same 4 or 5 ads, I’d pay more attention if there was something new.

(M, 36, USA, serious gamer)

”

This tendency towards ad engagement skews higher among the serious and light gamers, indicating they’re more receptive to other games, product, or service suggestions that come from a game or publisher they have a relationship with.

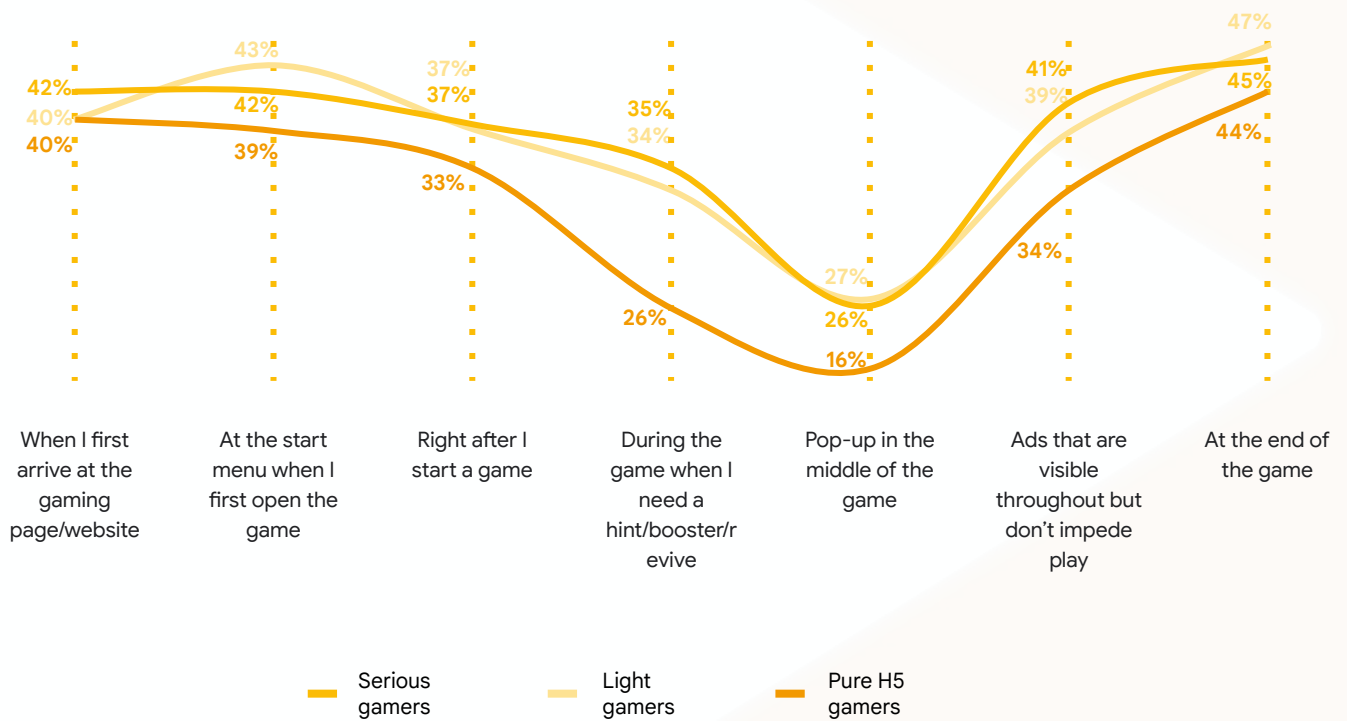


I will click on the ad if it
**features games, products,
or services** I’m interested in



For all gamers, there is a **clear preference for ads that don't interrupt gameplay**, with the most preferred ad placement being the beginning and end of the game. But for ads that are placed mid-game, those that are rewarded, and those in a **non-intrusive format** are better tolerated than pop-ups.

Ad placement preference (% Ranked top 3)





How you can level up: Timing and relevance is everything

H5 gamers of all types expect to see ads, and are mostly of the view that they can be helpful (either by adding to gameplay, or by helping them discover new games or products).

For game developers and publishers, it's about using the right formats, and presenting them to players at the right times.

There are a few tips that can help game developers and publishers optimize their in-game ad engagement.

- Lean into the power of **interstitial ads** - especially for hyper casual games with short play duration. Ensure it's placed at natural game breaks to maintain a good player experience.
- Consider how **rewarded ads** can be sequenced to appear at the perfect time (eg. an additional life, more time, hint or power up when stuck)
- Explore ways to make games more interactive, encouraging players to stay on longer, and motivating them to watch more rewarded ads to help them progress.

Conclusion

The H5 game industry presents strong growth potential for H5 and app game developers alike. The research shows that for serious, light, and pure gamers, interactions with H5 games broadens and deepens many aspects of their overall gaming activities and attitudes.

With a balanced approach to advertising, as well as prioritizing player trust and safety, game developers can unlock new audience segments while monetizing more effectively. And remember those key insights and implications.

1. **H5 gamers aren't who you'd expect.** Make H5 games easily accessible and consider how you can broaden your ad targeting to capture the full spectrum of players.
2. **Think cross-device, cross-platform.** Ensure you're optimizing your games for every device, and explore ways to diversify your online revenue streams.
3. **Safe and relaxing gaming attracts players.** Consider how you can make games easy to access, build gamer trust, and minimize barriers to play.
4. **Immersive gameplay leads to more engaged players.** Ensure that games are engaging, carry a sense of progression, and that the overall experience is optimized to gamer preferences.
5. **Grow engagement through thoughtful ads.** Provide a considered ad experience that benefits players while minimizing game disruption, keeping them engaged throughout.



H5 Report Methodology

Markets covered



India



Brazil



USA

Qualitative Exploration

A mixed methodology was used, this involved a UX pre-task to understand users' discovery engagement in H5 games, followed by 1-on-1 online in-depth interviews. The fieldwork took place in India, the USA, and Brazil, with 6 participants in each country. The interviews were conducted in May 2023.

Quantitative Survey

A survey was conducted to understand the gaming behavior of H5 gamers, with 1050 participants in each market. The participants were aged 16+, with a 50/50 split on gender. They all played H5 games in the past month and used a smartphone, desktop, laptop, or tablet as their primary gaming device.

The survey asked questions about the participants' gaming habits, such as how often they play H5 games, what types of games they play, and how they find new H5 games. The survey also asked about the participants' motivations for playing H5 games and their challenges and frustrations with H5 gaming.