Genre and Great Games

UNDERSTANDING AUDIENCES AND DESIGNING BETTER MOBILE GAMES
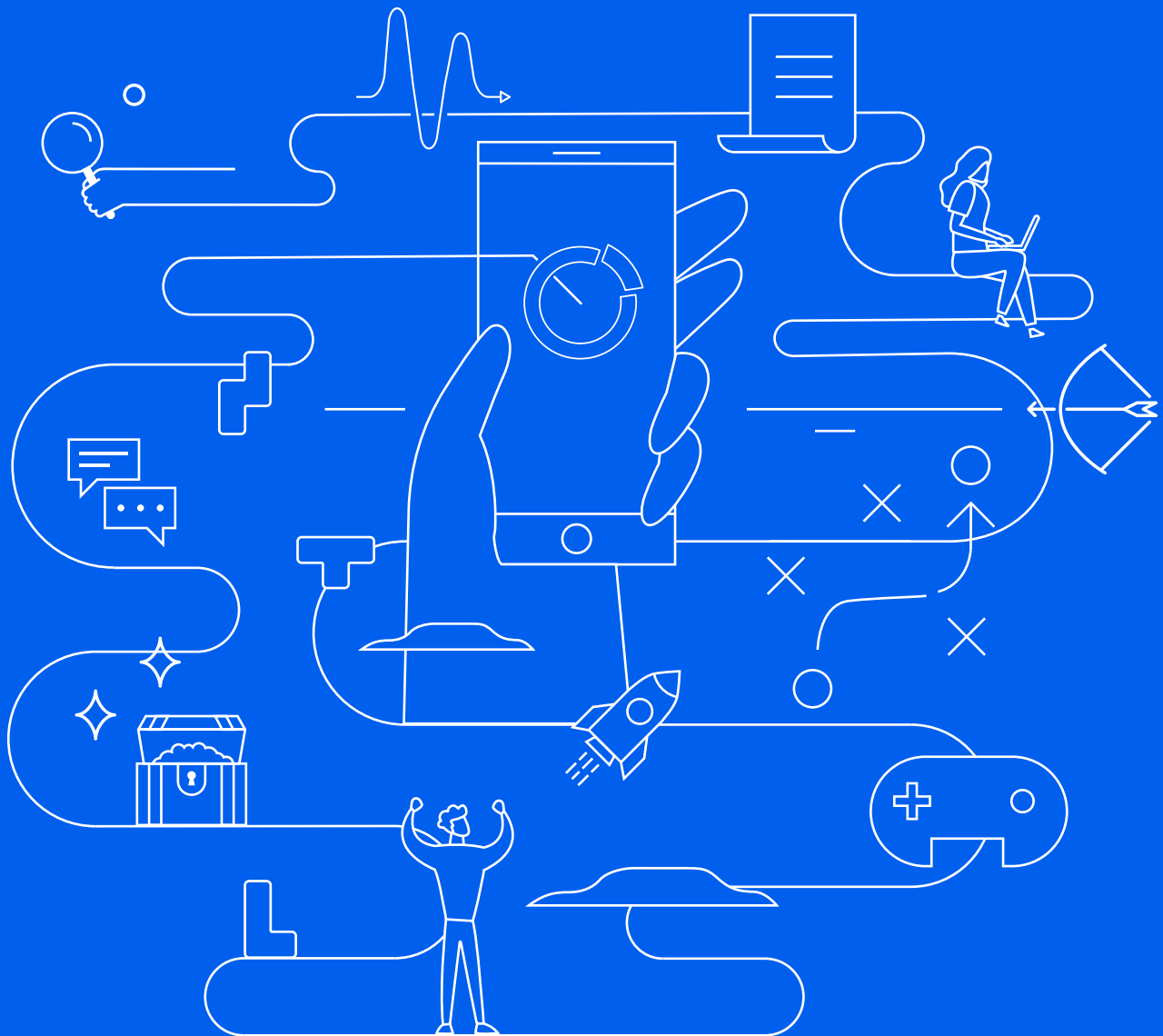
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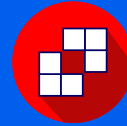
Introduction

Spanning from immersive, hardcore titles to relaxed, Hyper-Casual games, people are playing more genres than ever before. And it's expected to continue that way. Only 24% of US mobile game players say their next game will be the same genre, while this number drops to 10% among Japanese and South Korean players.[1]

This trend of "genre diversification" was something we initially identified in the 2019 Gaming Marketing Report but we wanted to dive deeper. We sought to understand people's motivations for playing different genres and how well current games in specific genres were delivering on those needs. We researched what role community played in mobile games, the types of ads players liked to see and what monetization models worked well across all genres.

But what are insights without actions? How can game developers take this research and make better games? That's where the game feature analysis comes in. Once we had the insights we were able to map the behaviors to game features. We looked at basic features that a game should include as well as what the top 20% of games in each genre are using.

We hope this report is an insightful but practical resource that game developers and marketers can use to better understand players, attract new ones (and bring back lapsed players), and create better games for everyone.

Contributing partners

facebook gaming

With more than 2.5 billion people playing mobile games across the globe[1], players are more diverse than ever before. Understanding these changing audiences, designing great games and finding players is no easy feat. But with growth, comes opportunity. With this report, Facebook Gaming set out to pair new audience insights and industry-leading game feature analysis to deliver a cohesive study that examines what motivates players in different markets to engage with games of different genres, and what features can speak to those motivations.

FACEBOOK IQ

Facebook IQ is Facebook's home for insights powered by what unfolds on our platforms every day. We give our partners the power to unlock economic opportunity through actionable insights. We believe in the power of actionable insights to help businesses connect more meaningfully with people and drive results. With new global commissioned research and first-party data analysis, Facebook IQ has identified the motivations and behaviors of mobile gamers across genres to more effectively develop and market new titles.

GameRefinery

Based in Finland, GameRefinery is the leading provider of feature-level data in the mobile games market, with an ever-growing database covering hundreds of thousands of games. GameRefinery's customers include leading mobile games companies such as Zynga, SquareEnix, King and Funplus. The GameRefinery platform uses unique algorithms and a team of expert analysts to help developers, investors and publishers delve into the very building blocks of mobile games to uncover the drivers behind success, to understand why games are successful and how to achieve the same from pre-production to LiveOps.

The power of genre

Genre is the most influential factor that drives people to try out new games. Across 9 surveyed markets, nearly half of players say that genre is important when deciding which new mobile game to try, exceeding factors like friends or family recommendations and app store reviews.
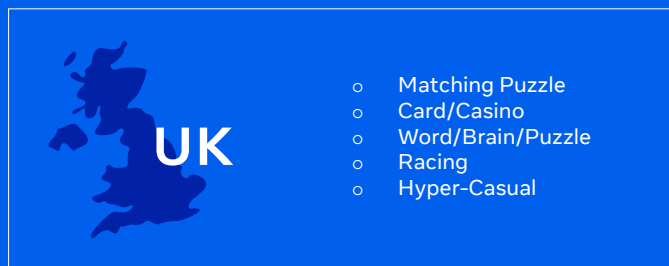
(AVERAGE ACROSS US, CA, UK, FR, DE, BR, JP, KR, AU)

33%
Device/data requirements

34%
Sequel familiarity

49%
Genre

40%
Recommendations from family/friends

35%
App store reviews
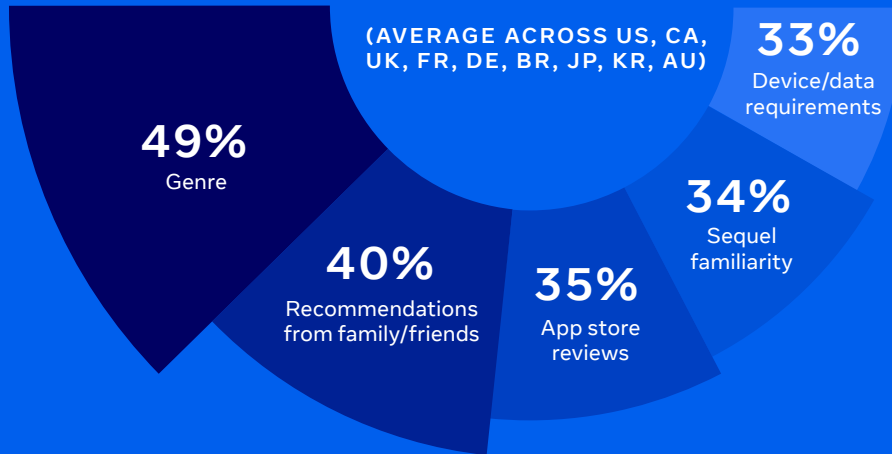
Genre across geographies

While genre is important, it's also worth noting that each country shows different preferences when it comes to their favorite genres. Matching Puzzle is consistently high across the US, UK, South Korea and Japan. Japan shows higher playership among RPG sub-genres like Puzzle RPG and Action RPG/MMORPG while the US and European markets show higher incidence rates of playing Card and Casino games.

TOP GENRES BY MARKET[2]

US
- o Card/Casino
- o Matching Puzzle
- o Word/Brain/Board
- o Racing
- o Hyper-Casual

UK
- o Matching Puzzle
- o Card/Casino
- o Word/Brain/Puzzle
- o Racing
- o Hyper-Casual

JAPAN
- o Matching Puzzle
- o Puzzle RPG
- o Racing
- o Action RPG/MMORPG
- o AR/Location-Based

SOUTH KOREA
- o Matching Puzzle
- o Idler
- o Sports
- o Racing
- o Action RPG/MMORPG

Methodology & structure

To explore the nuances between mobile gaming genres we surveyed 13,412 mobile gamers across 11 countries (US, CA, UK, FR, DE, IN, ID, AU, JP, KR, BR). In this study, we segmented players across 27 different mobile gaming genres and sub-genres. In addition to this study, we analyzed our internal app events data to uncover behavioral insights across mobile gaming genres.

Report structure

WE SPOTLIGHT 4 KEY MOBILE GENRES, FOCUSING ON 4 COUNTRIES

STRATEGY   RPG   PUZZLE   HYPER-CASUAL

UK

US

SOUTH KOREA

JAPAN
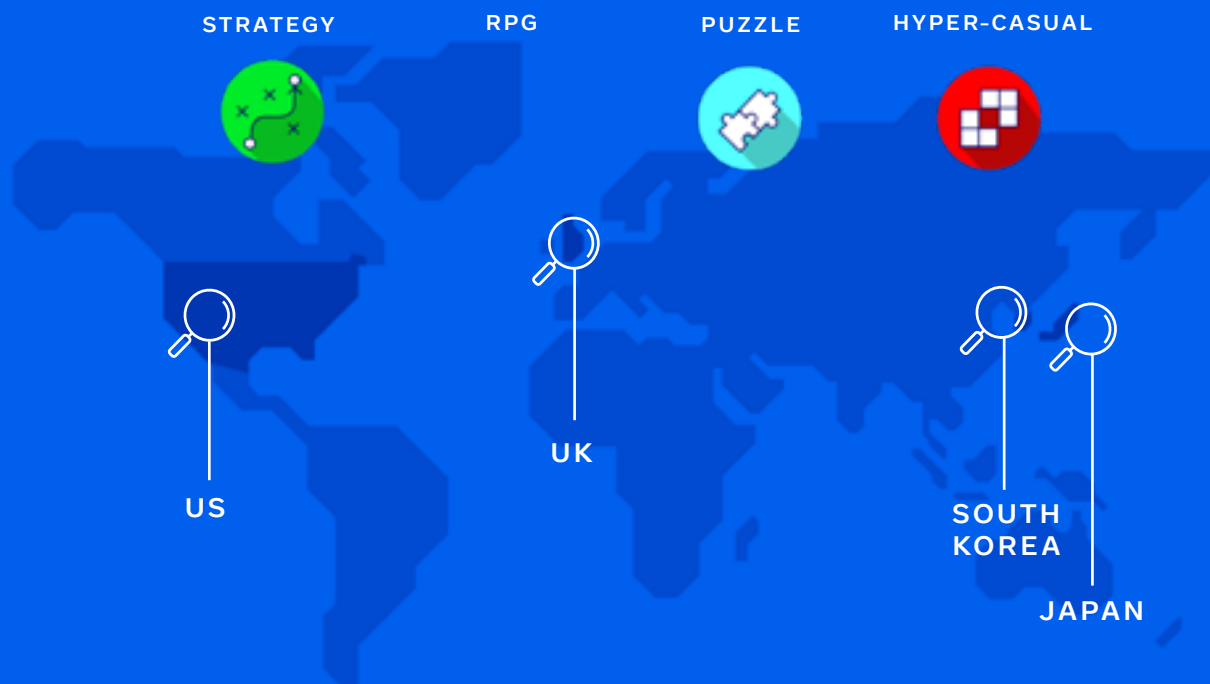
WE EXPLORE EACH OF THESE GENRES ACROSS 4 CATEGORIES

1 GENRE FULFILLMENT
What motivates people to play particular genres and how well games satisfy them.

2 COMMUNITY
The role community plays in each genre and features that can enhance social connection.

3 MONETIZATION
What monetization strategy suits each genre and what features can support your strategy.

4 AD PREFERENCES
How to entice players to try out new games and bring back lapsed players.

Reading the report

This report is designed to be read by genre and is aimed at both new and sophisticated game developers and marketers.
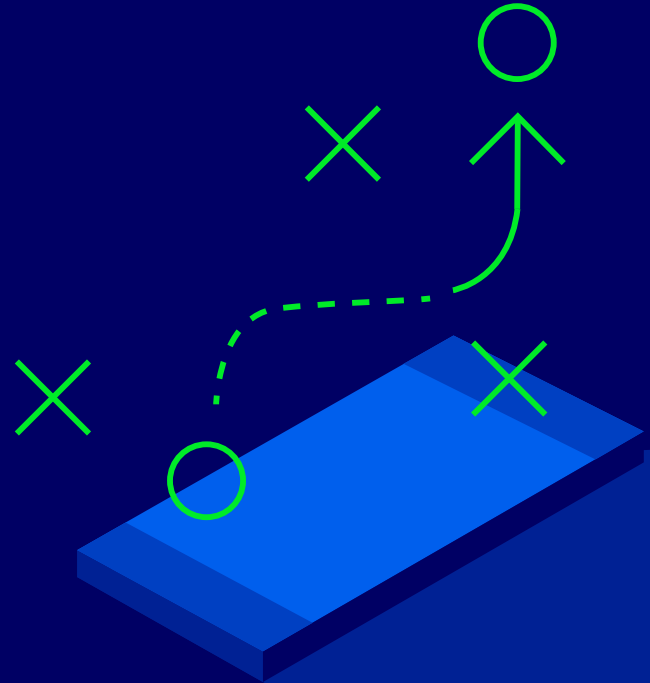
The report is interactive (depending on browser), allowing you to navigate between genres using the progress bar on the right.

Each genre includes an executive summary, audience insights, game feature insights and recommendations.

01
Strategy

Strategy executive summary

	INSIGHT	TAKEAWAY
1 GENRE FULFILLMENT	Relieving stress and feeling accomplished are the main reasons players like Strategy games but they say games fall short in making them feel accomplished after a challenge and don't provide enough social elements.	Consider adding features like special PvE modes, exclusive live event rewards or the ability to salvage characters/items to keep your players engaged.
2 COMMUNITY	Strategy players are more likely to engage with others both during and outside of gameplay and welcome communication from gaming brands/developers.	Marketers can build a community by providing tips, tricks and information on new in-game events. Developers can explore features like guild wars and competition, co-op tasks and the ability to donate items.
3 MONETIZATION	Due to the competitive nature of Strategy games, Strategy is among the top three genres in which players are most likely to make an in-app purchase. Although players are more likely to purchase, they also show an openness toward in-app ads.	Offering features like battle pass plans and the ability to purchase characters and/or gear can help fuel in-app purchases while incorporating ads can help diversify your monetization strategy.
4 AD PREFERENCES	Strategy players like to see ads that show gameplay and characters, with US and UK players preferring "challenging" tones. Meanwhile, Japanese players prefer ads that display humor.	Marketers can reach Strategy players by personalizing communications to the nuances of each market and individual gamer.

State of
Strategy games

There are many sub-genres of Strategy games, from Multiplayer Battle Arena to Tactical Battler and 4X Strategy. Most popular in South Korea and the US, about 1 in 4 mobile gamers play Strategy games. However this genre remains relatively niche in Japan with only 12% of mobile gamers playing Strategy games.

STRATEGY MOBILE GAMING PLAYERSHIP[1]
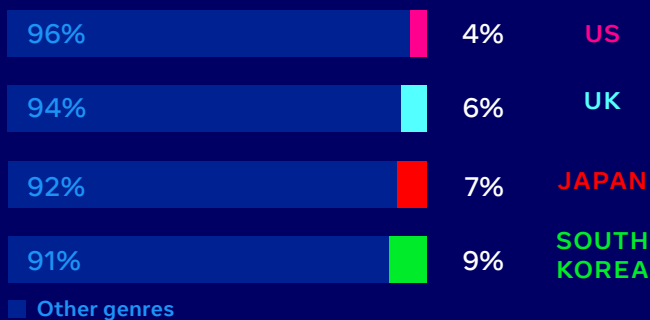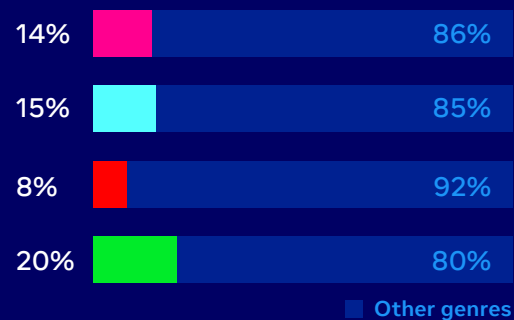
SOUTH KOREA
26%

UK
20%

JAPAN
12%

US
23%

SHARE OF DOWNLOADS BY COUNTRY[2]

96%	4%	US	
94%	6%	UK	
92%	7%	JAPAN	
91%	9%	SOUTH KOREA	

■ Other genres

SHARE OF REVENUE BY COUNTRY[2]

14%	86%	US	
15%	85%	UK	
8%	92%	JAPAN	
20%	80%	SOUTH KOREA	

■ Other genres

Who are Strategy players?

Strategy players tend to be younger males who play for longer and like trying out new games. They view mobile gaming as a social activity, preferring game features that enable social interaction. This high engagement rate means that it comes as no surprise that Strategy players are more likely to self-identify as "gamers" than other mobile gamers.

■ US ■ UK ■ JAPAN ■ SOUTH KOREA
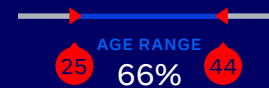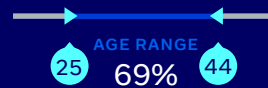
GENDER AND AGE

	US	UK	JAPAN	SOUTH KOREA
Female	33%	31%	32%	35%
Male	67%	69%	68%	65%
AGE RANGE	18–34: 59%	25–44: 69%	25–44: 66%	25–44: 60%

AVERAGE NUMBER OF GAMES PLAYED

US	UK	JAPAN	SOUTH KOREA
3.4	3.3	2.6	3.4

SAY THEIR TYPICAL PLAY SESSION LASTS OVER 30 MINS

US	UK	JAPAN	SOUTH KOREA
60%	52%	56%	68%

MORE LIKELY TO SELF-IDENTIFY AS "GAMERS"

US	UK	JAPAN	SOUTH KOREA
1.8x	1.7x	1.4x	1.4x
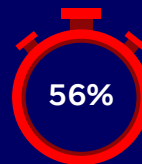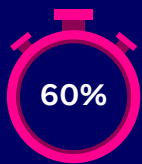
WHY THEY PLAY MOBILE GAMES

55% say feeling accomplished because they completed something challenging is a "very appealing" reason to play

49% say feeling accomplished because they completed something challenging is a "very appealing" reason to play

43% say immersing themselves in another character or world is a "very appealing" reason to play

43% say feeling accomplished because they completed something challenging is a "very appealing" reason to play
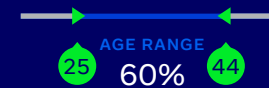
MORE LIKELY TO PREFER MULTIPLAYER ONLINE MODES

US	UK	JAPAN	SOUTH KOREA
1.5x	1.7x	1.7x	1.2x

Why people play

Relieving stress and feeling accomplished are key reasons why Strategy players enjoy mobile games. And while Strategy games excel at delivering on several factors, including "defeating others in competition", there's a disconnect between what Strategy players expect versus what is delivered.

In the US and Japan, players say Strategy games fall short in making them feel accomplished after completing something challenging. Meanwhile, in the UK, being able to connect with people they know is a "very appealing" reason why Strategy gamers play, but players don't feel current Strategy games provide this very well.

■ **Very important reasons Strategy players enjoy mobile gaming**   ■ **How well Strategy games provide this**

Relieving stress 65% / 52%
Feeling accomplished for completing something challeging 55% / 43%
Passing time 53% / 58%
Defeating others in competition 49% / 52%
Immersing myself in another character/world 49% / 44%
Being dazzled by something unique 48% / 38%

US
While 55% of Strategy players in the US play games to feel accomplished about completing something challenging, only 43% feel current Strategy mobile games deliver on this.

Relieving stress 62% / 55%
Passing time 53% / 55%
Feeling accomplished for completing something challenging 49% / 46%
Connecting with people I know 44% / 37%
Immersing myself in another character/world 44% / 33%
Defeating others in competition 40% / 39%

UK
While 44% of Strategy players in the UK play games to connect with other people they know, only 37% feel current Strategy mobile games deliver on this.

Relieving stress 46% / 37%
Immersing myself in another character/world 43% / 36%
Passing time 41% / 44%
Feeling accomplished for completing something challeging 39% / 29%
Collecting virtual items 33% / 29%
Being dazzled by something unique 29% / 36%
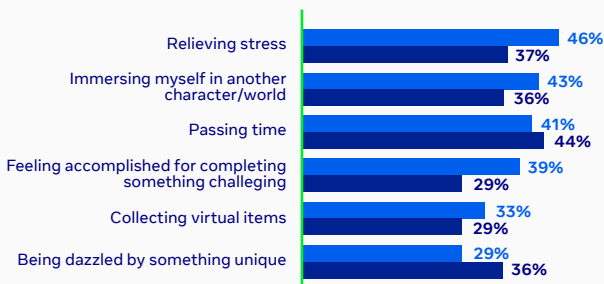
JAPAN
While 39% of Strategy players in Japan play games to feel accomplished about completing something challenging, only 29% feel current Strategy mobile games deliver on this.

Relieving stress 61% / 37%
Feeling accomplished for completing something challeging 43% / 34%
Being dazzled by something unique 40% / 27%
Defeating others in competition 38% / 40%
Passing time 34% / 37%
Connects me to something I'm passionate about outside of gaming 31% / 21%

SOUTH KOREA
While 61% of Strategy players in South Korea play games to relieve stress, only 37% feel current Strategy mobile games deliver on this.

Source: "Mobile Gaming Genre Study" by Interpret (Facebook IQ-commissioned online survey of 13,412 mobile games ages 18+ across AU, BR, CA, DE, FR, ID, IN, JP, KR, UK, US, Nov–Dec 2019)

Why people stray

Lack of fulfillment in key gaming motivations may lead players to churn. For Strategy players, there are significant gaps in the ability to feel accomplished and be challenged in the games they're currently playing, causing them to abandon mobile games out of boredom. The inability to meet these expectations can also provoke the feeling that the games are too repetitive or lack meaningful progress, prompting Strategy players to seek fulfillment elsewhere.

To fulfill their varying gaming needs, Strategy players are also playing other genres. Across all four markets, Hyper-Casual and Action games are among the top three genres that Strategy players have downloaded recently. In Japan and South Korea, they're also likely to also have downloaded Role-Playing games.

■ **Top reasons Strategy players stop playing Strategy games[1]**

■ **Top genres installed by Strategy mobile gamers[2]***

US

41%
I get bored with the game

29%
I'm not making any progress, or progress is too slow

24%
The game is too repetitive

- o **Hyper-Casual**
- o **Action**
- o **Puzzle**

UK

35%
I get bored with the game

22%
The game is too repetitive

22%
Ads that are too frequent

- o **Hyper-Casual**
- o **Simulation**
- o **Action**

JAPAN

49%
I get bored with the game

34%
I'm not making any progress, or progress is too slow

24%
The game is too aggressive with pushing in-app purchases
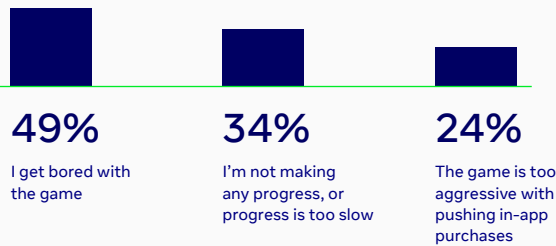
- o **Action**
- o **Role-Playing**
- o **Hyper-Casual**

SOUTH KOREA
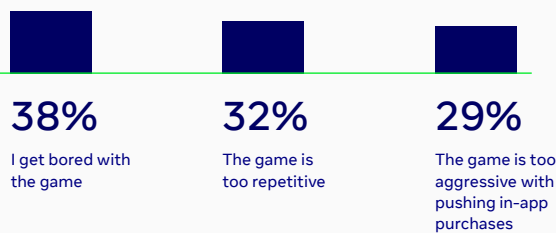
38%
I get bored with the game

32%
The game is too repetitive

29%
The game is too aggressive with pushing in-app purchases

- o **Role-Playing**
- o **Action**
- o **Hyper-Casual**

Feature insights: Genre fulfillment

Strategy games have long learning curves, which means they have to keep players engaged and satisfied for weeks and months. Having the right set of in-game features increases the feeling of accomplishment and enjoyment, which in turn reflects positively on user retention.

BASIC FEATURES (COMMON ACROSS ALL STRATEGY GAMES)

Live events of various kinds, collectible mechanics, achievements and daily login rewards are some of the basic features that have become table stakes for Strategy games.
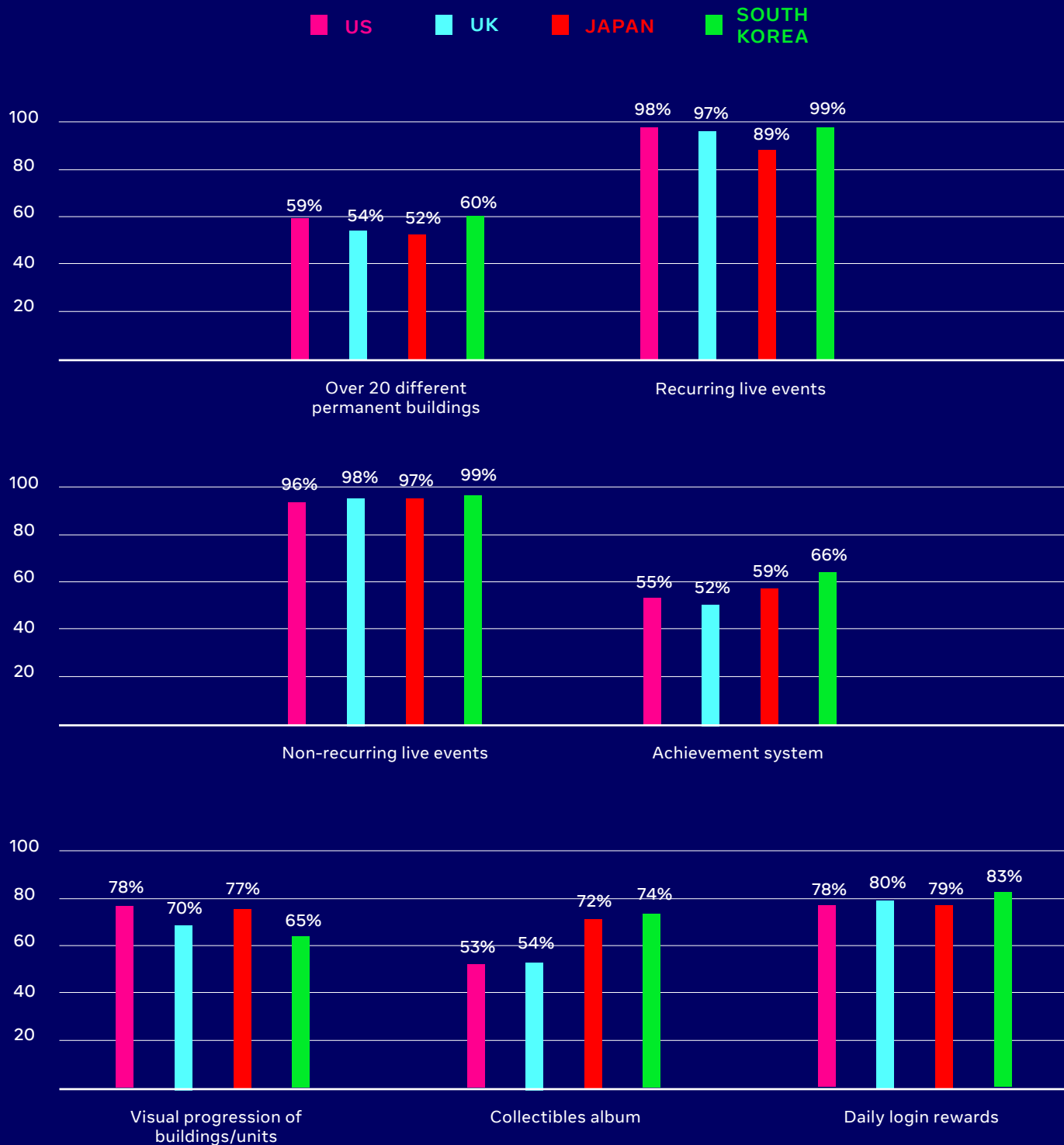
Legend: US | UK | JAPAN | SOUTH KOREA

Over 20 different permanent buildings: US 59%, UK 54%, JAPAN 52%, SOUTH KOREA 60%

Recurring live events: US 98%, UK 97%, JAPAN 89%, SOUTH KOREA 99%

Non-recurring live events: US 96%, UK 98%, JAPAN 97%, SOUTH KOREA 99%

Achievement system: US 55%, UK 52%, JAPAN 59%, SOUTH KOREA 66%

Visual progression of buildings/units: US 78%, UK 70%, JAPAN 77%, SOUTH KOREA 65%

Collectibles album: US 53%, UK 54%, JAPAN 72%, SOUTH KOREA 74%

Daily login rewards: US 78%, UK 80%, JAPAN 79%, SOUTH KOREA 83%

KEY FEATURES
(TOP STRATEGY GAMES WIN WITH THESE)

When looking at the top 20% of Strategy games* the market data pinpoints several "key features" they are utilizing that sets them apart from the others. As these key features are especially differentiating between the best performing Strategy games versus the rest, developers should pay special attention to them when planning feature roadmaps during both pre-production and liveops.

According to data, the following three key features are especially good success drivers, as they are utilized much more by the best performing Strategy games compared to the rest.

■ **Top 20%* utilization**   ■ **Overall utilization**

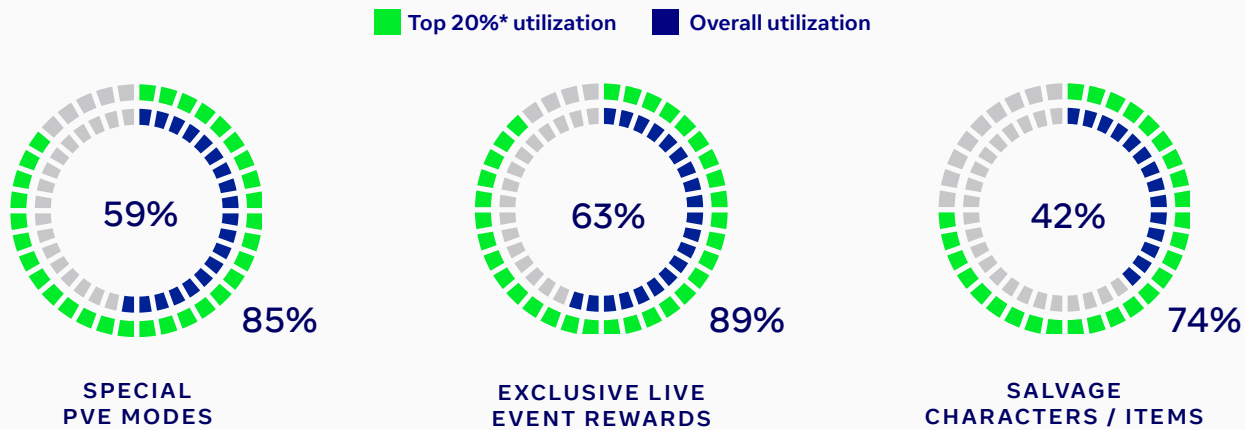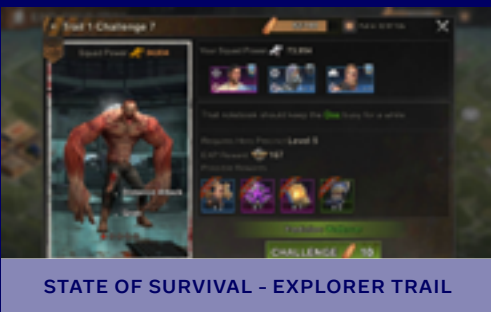| 59% | 63% | 42% |
| 85% | 89% | 74% |
| **SPECIAL PVE MODES** | **EXCLUSIVE LIVE EVENT REWARDS** | **SALVAGE CHARACTERS / ITEMS** |

Source: GameRefinery data based on statistical sampling of iOS top grossing 10,000 games in US, UK, Japan and South Korea, Q1 2020

*Top grossing fifth of all Strategy games in US, KR, JP, UK

STATE OF SURVIVAL - EXPLORER TRAIL

SPECIAL PVE MODES

Strategy games traditionally focus heavily on competitive PvP-action, but from time to time many gamers like to engage in not-as-competitive PvE playing as well.

Having special PvE campaigns and playing modes alongside the main PvP-focused gameplay helps drive engagement and retention among Strategy players.

LORDS MOBILE – EVENT HEROES
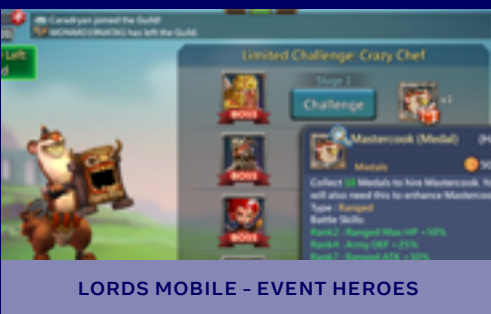
EXCLUSIVE LIVE EVENT REWARDS

Introducing exclusive rewards gained by participating and being successful in limited-time events is a proven way to give players new goals to strive towards and increase the sense of accomplishment.

Unique items, castle skins, or huge piles of resources and currency together with a special title to brag about are just some ways to implement this feature.

STAR TREK FLEET COMMAND – SCRAPPING SHIPS

SALVAGE CHARACTERS/ITEMS

Many top Strategy games have implemented salvaging mechanics to make their in-game economy and meta-game progression more versatile.

Salvaging enables players to extract value out of their otherwise obsolete items and characters. As a result, the sense of value from game rewards and in-app purchases overall is increased.

Community

Explore the role of community and how to enhance social connection

Community in Strategy games

Strategy players are highly engaged in social activities related to the genre. Three-quarters of Strategy players in the US and 92% in South Korea have engaged in some kind of social activity, such as chatting in person with people about Strategy games or looking at other players' scores and achievements online. US Strategy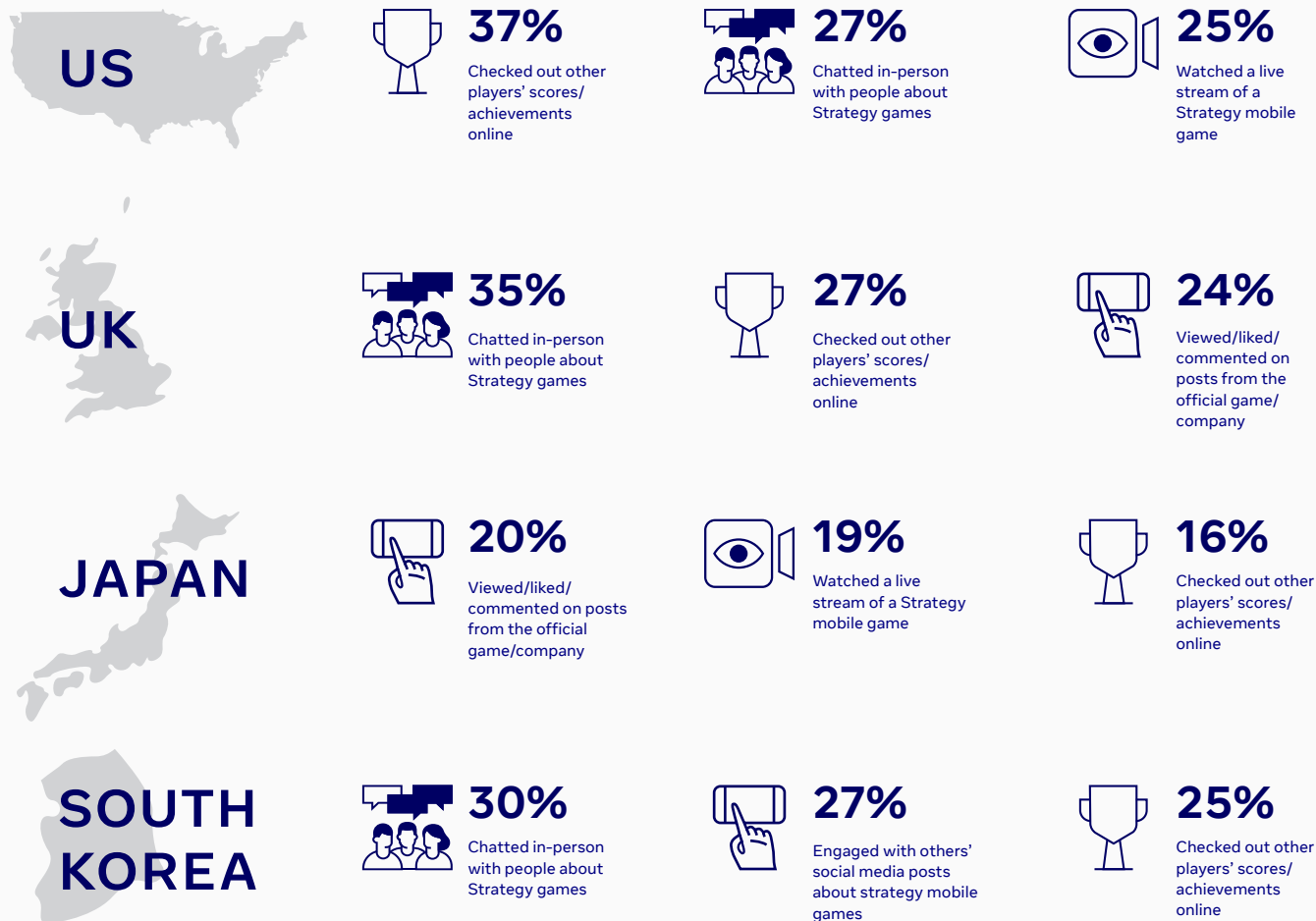 players are particularly more interested in comparing scores/achievements online with 37% doing so in the past 3 months (compared to 27% of UK Strategy players and 16% of Japanese Strategy players).

Online communities are also an increasingly popular source of community for Strategy players. Nearly two-thirds of Strategy players in Japan and 52% of Strategy players in the US visit a mobile gaming community weekly. Across geographies, the primary reason why Strategy players visit online communities is to learn ways to keep improving at the game.

SOCIAL/COMMUNITY ACTIVITIES THAT STRATEGY PLAYERS HAVE DONE IN THE PAST THREE MONTHS

US

37%
Checked out other players' scores/ achievements online

27%
Chatted in-person with people about Strategy games

25%
Watched a live stream of a Strategy mobile game

UK

35%
Chatted in-person with people about Strategy games

27%
Checked out other players' scores/ achievements online

24%
Viewed/liked/ commented on posts from the official game/ company

JAPAN

20%
Viewed/liked/ commented on posts from the official game/company

19%
Watched a live stream of a Strategy mobile game

16%
Checked out other players' scores/ achievements online

SOUTH KOREA

30%
Chatted in-person with people about Strategy games

27%
Engaged with others' social media posts about strategy mobile games

25%
Checked out other players' scores/ achievements online

Source: "Mobile Gaming Genre Study" by Interpret (Facebook IQ-commissioned online survey of 13,412 mobile games ages 18+ across AU, BR, CA, DE, FR, ID, IN, JP, KR, UK, US, Nov–Dec 2019)

Perhaps unsurprisingly, Strategy players also gravitate toward features that enable social interaction during gameplay. More than 4 in 10 Strategy players in the UK, US and Japan say they enjoy playing multiplayer online modes, and over 1 in 4 say they enjoy chatting when playing games with others.
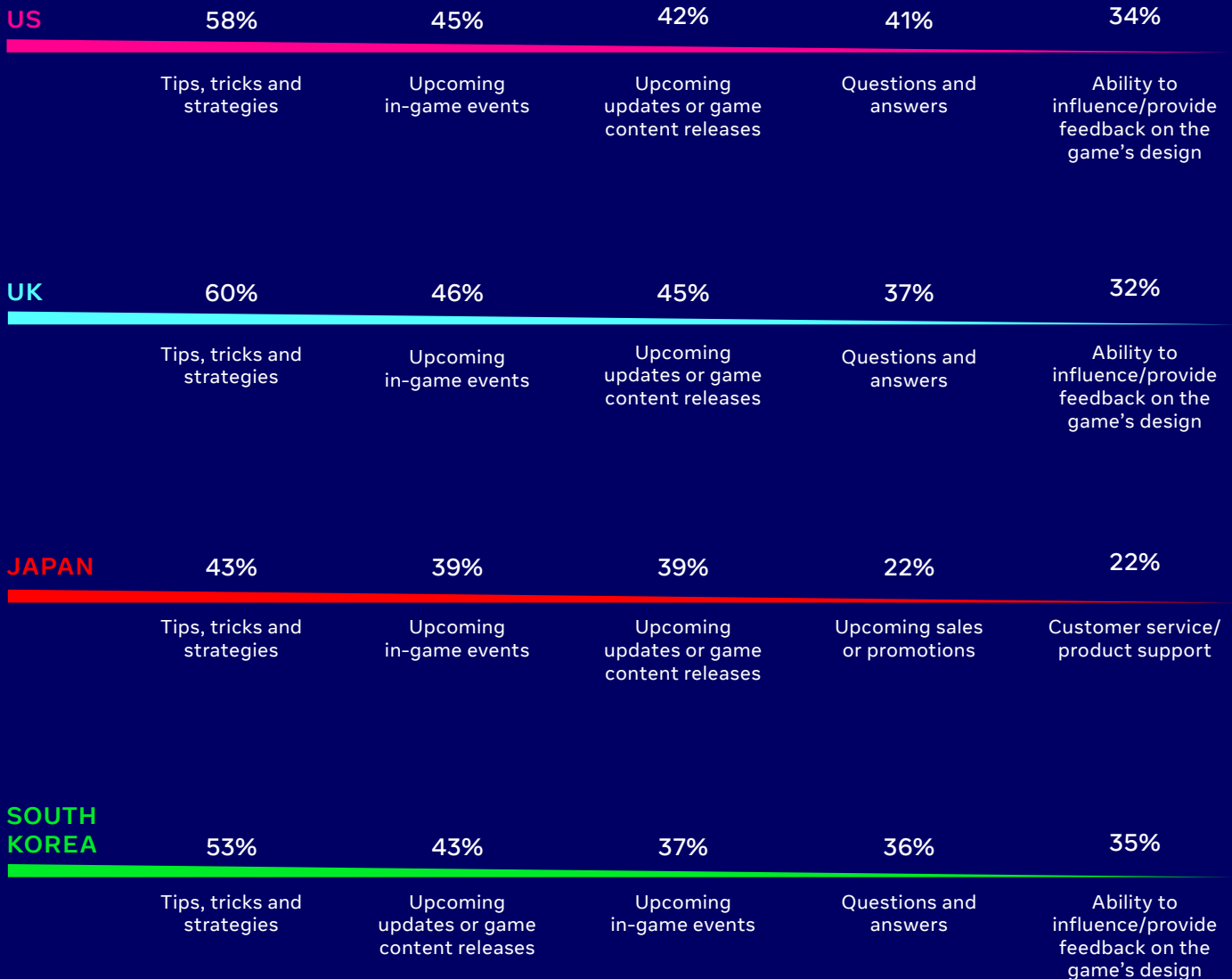
While the ability to play with others is important to Strategy players, it's important to note that the majority of them are willing to try other games that their friends aren't playing. In fact, 73% of US Strategy players and 66% of UK Strategy players say they often play games that their friends aren't playing.

While Strategy players tend to form communities organically, developers have the power to enhance communities by providing the right content. And Strategy players are keen to hear from game developers with 94% of UK players and 91% of US players saying they'd be open to some type of messaging from brands.

Across markets, tips and tricks as well as information on upcoming in-game events are of particular interest to Strategy players. Players in the US, UK and South Korea are also keen to be able to influence or provide feedback on the games themselves.

INFORMATION STRATEGY PLAYERS WANT TO RECEIVE FROM MOBILE GAMES/DEVELOPERS

US

58%	45%	42%	41%	34%
Tips, tricks and strategies	Upcoming in-game events	Upcoming updates or game content releases	Questions and answers	Ability to influence/provide feedback on the game's design

UK

60%	46%	45%	37%	32%
Tips, tricks and strategies	Upcoming in-game events	Upcoming updates or game content releases	Questions and answers	Ability to influence/provide feedback on the game's design

JAPAN

43%	39%	39%	22%	22%
Tips, tricks and strategies	Upcoming in-game events	Upcoming updates or game content releases	Upcoming sales or promotions	Customer service/ product support

SOUTH KOREA

53%	43%	37%	36%	35%
Tips, tricks and strategies	Upcoming updates or game content releases	Upcoming in-game events	Questions and answers	Ability to influence/provide feedback on the game's design

Feature insights: Community

Strategy players value social engagement and communal activities highly, which should be focused on during feature-set development throughout any Strategy game's life cycle.

BASIC FEATURES
(COMMON ACROSS ALL STRATEGY GAMES)

When looking at the most utilized social features in Strategy games across regions, it's clear that chat, PvP possibility, resource raiding and guild mechanics form the backbone of communal features in the genre. In other words, the vast majority of all Strategy games in the market are utilizing these mechanics.
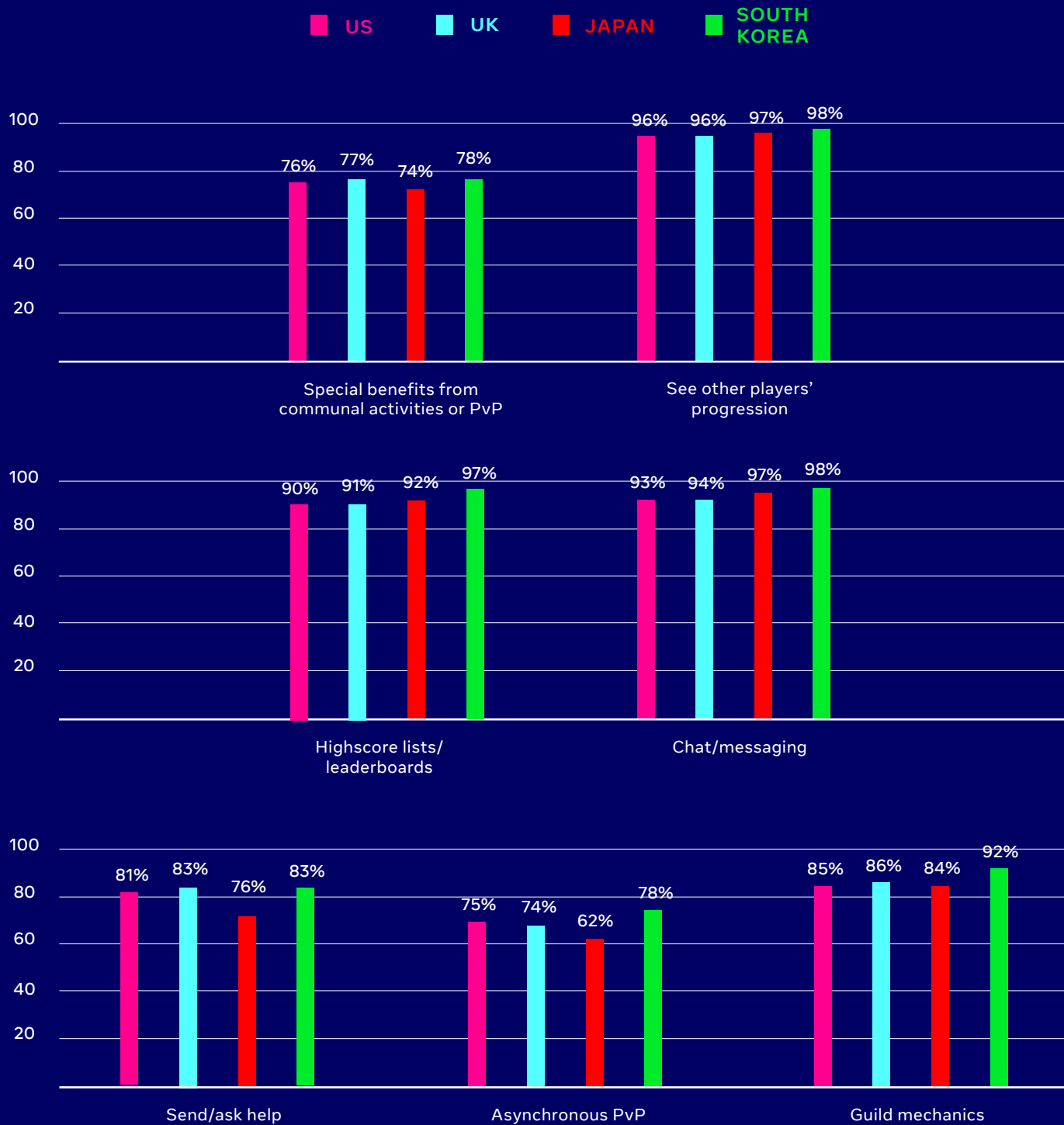
US   **UK**   **JAPAN**   **SOUTH KOREA**

Special benefits from communal activities or PvP
- US: 76%
- UK: 77%
- JAPAN: 74%
- SOUTH KOREA: 78%

See other players' progression
- US: 96%
- UK: 96%
- JAPAN: 97%
- SOUTH KOREA: 98%

Highscore lists/ leaderboards
- US: 90%
- UK: 91%
- JAPAN: 92%
- SOUTH KOREA: 97%

Chat/messaging
- US: 93%
- UK: 94%
- JAPAN: 97%
- SOUTH KOREA: 98%

Send/ask help
- US: 81%
- UK: 83%
- JAPAN: 76%
- SOUTH KOREA: 83%

Asynchronous PvP
- US: 75%
- UK: 74%
- JAPAN: 62%
- SOUTH KOREA: 78%

Guild mechanics
- US: 85%
- UK: 86%
- JAPAN: 84%
- SOUTH KOREA: 92%

KEY FEATURES
(TOP STRATEGY GAMES WIN WITH THESE)

When looking at the best performing Strategy games, we're again able to pinpoint several key features top Strategy games are using more frequently than the other Strategy games. These include, for example, special currencies and exclusive benefits for joining guilds or participating in PvP tournaments, a range of engaging co-operational activities as well as being able to donate characters, items or units to fellow players.

According to data, the following three key features are especially good success drivers, as they are utilized much more by the best performing Strategy games compared to the rest.

■ Top 20%* utilization   **■ Overall utilization**

63% / 87%	51% / 76%	59% / 79%
GUILD WARS & COMPETITIONS	**CO-OP TASKS**	**DONATING ITEMS/ RESOURCES**

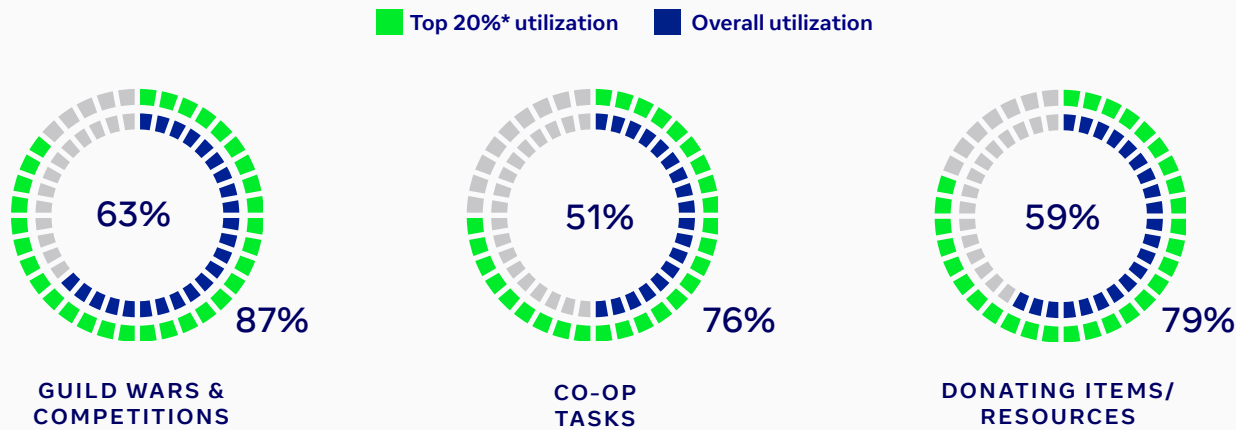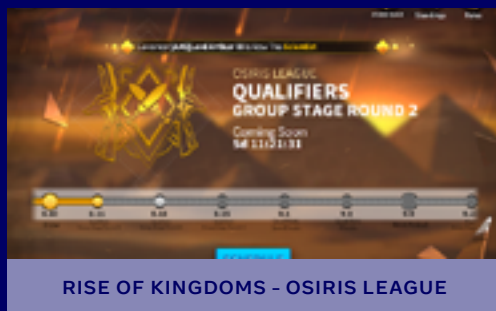Source: GameRefinery data based on statistical sampling of iOS top grossing 10,000 games in US, UK, Japan and South Korea, Q1 2020

*Top grossing fifth of all Strategy games in US, KR, JP, UK

GUILD WARS & COMPETITIONS

Across all markets, the best performing Strategy games have regular rotations of guild wars and competitions, especially in 4X and Build & Battle sub-genres.

These instances are extremely engaging for higher tier / late game players who usually are the biggest spenders.

RISE OF KINGDOMS - OSIRIS LEAGUE

CO-OP TASKS

Completing larger tasks and goals together with other players is trending heavily across the globe, no matter the genre. In strategy games these co-op tasks are often tied to limited-time events to increase the "sense of urgency".

As Strategy players value social gaming, having concrete targets to strive towards together fits this motivation seamlessly.

STAR TREK FLEET COMMAND - ARMADAS

DONATING ITEMS / RESOURCES

Donating items or resources to friends is possible in vast majority of top Strategy games.

The recent trend has been to take this feature a bit further. As a result, some strategy games let you purchase reward chests to your whole clan for extra rewards to yourself. This mechanic is a clever way of bringing communal aspects to in-app purchase transactions.

STAR TREK FLEET COMMAND – ALLIANCE REWARDS

In-app purchases in Strategy games

Across the US, UK, Japan and South Korea, Strategy games are within the top three genres in which mobile gamers make in-app purchases (IAP). South Korean Strategy players are the most likely to make a purchase monthly with 9.6% having done so (compared to 6.5% of Strategy players in the UK).[1]

% OF PLAYERS WHO MAKE AN IN-APP PURCHASE IN A MONTH[1]

6.5% UK

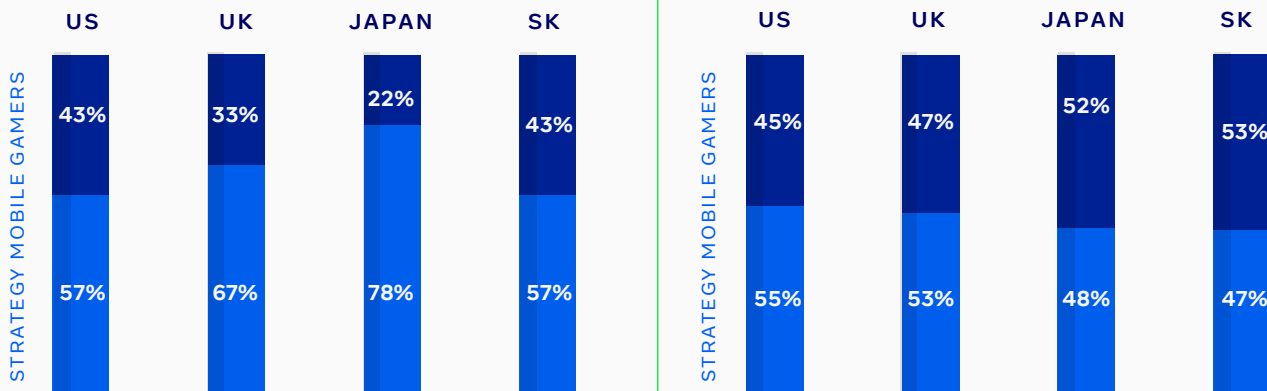**7.2%** JAPAN

7.8% US

9.6% SOUTH KOREA
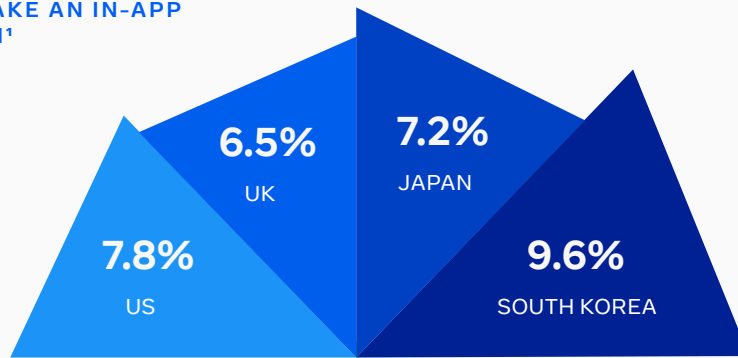
When it comes to purchasing, the majority of Strategy players prefer making purchases directly as opposed to ones having a random element. This is particularly emphasized for Japanese players with 78% saying they prefer direct in-app purchases (compared to 57% of US Strategy players).[2]

It's also interesting to note that US and UK Strategy players are less likely to support pay-to-win options with over half saying in-app purchases should be limited to items that don't help you win. On the other hand, 52% of Japanese Strategy players agree that in-app purchases should include items that can help you win.[2]

■ I prefer to make in-app purchases directly

■ I prefer in-app purchases with a random element (e.g. loot boxes)

■ In-app purchases should be limited to items that don't help you win

■ In-app purchases can include items that help you win

	US	UK	JAPAN	SK
STRATEGY MOBILE GAMERS	43%	33%	22%	43%
	57%	67%	78%	57%

|	US	UK	JAPAN	SK
STRATEGY MOBILE GAMERS	45%	47%	52%	53%
	55%	53%	48%	47%

Sources: 1) Facebook Mobile Gaming Insights (first party data), Q1 2020
2) "Mobile Gaming Genre Study" by Interpret (Facebook IQ-commissioned online survey of 13,412 mobile games ages 18+ across AU, BR, CA, DE, FR, ID, IN, JP, KR, UK, US, Nov–Dec 2019)

Incorporating ads into Strategy games

Relying on in-app purchases as a way to monetize your game can risk turning Strategy players away, with more than 1 in 5 Strategy players in the US, UK, South Korea and Japan having abandoned a Strategy mobile game because it was too aggressive with pushing in-app purchases.

To balance this, developers can implement a mixed monetization strategy, incorporating in-app advertising (IAA). Strategy players are open to this; 84% of players in South Korea and 72% of players in the US say they are okay with seeing in-app ads.[1]

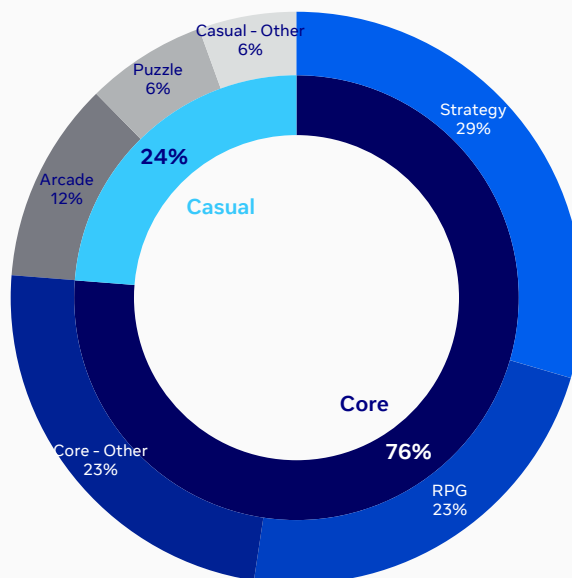**% OF STRATEGY MOBILE GAMERS WHO ARE OPEN TO IN-APP ADS**
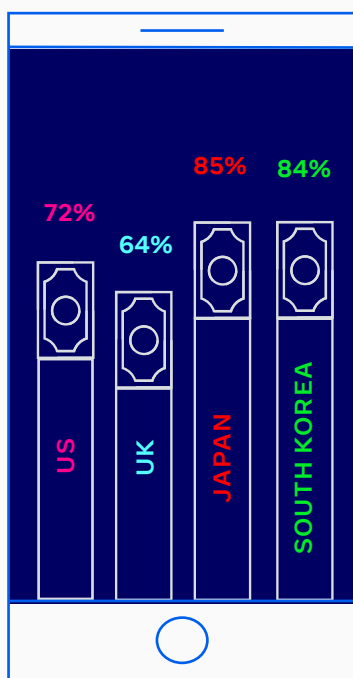
The number of mobile games with an ad SDK is on the rise according to App Annie, who report that 89% of the top downloaded games of 2019 had an ad SDK. Of the games with an ad SDK installed, Casual games accounted for the majority of downloads, while core genres represented 76% of time spent in games globally — led by Strategy (29%) and RPG (23%).

This is a higher share than it is among core genres overall (including both those with and without an ad SDK), where core games' share of time spent represents over 55% globally[2]. Since these genres generally have a higher consumer spend, publishers can explore complementing existing in-app purchase monetization schemes with ad-monetization techniques, such as rewarded video.[2] For more information on incorporating ads into games, read the full App Annie report on Facebook Audience Network.

SHARE OF GLOBAL TIME SPENT AMONG GAMES WITH ADVERTISING PLATFORM SDK BY GENRE[2]

72% US
64% UK
85% JAPAN
84% SOUTH KOREA

Casual - Other 6%
Puzzle 6%
Arcade 12%
24% Casual
Core - Other 23%
Strategy 29%
Core
76%
RPG 23%

It's important to take gamer preferences for viewing in-app ads into account in order to provide value to the experience. Generally, Strategy players prefer longer, less frequent ad breaks compared to shorter, more frequent ones. Over the course of 10 minutes of gameplay, 56% of Japanese Strategy players would like to see one 30 second ad as opposed to shorter ad units with more frequent breaks. Incentivizing players to watch ads can also be beneficial; 61% of South Korean Strategy players say they prefer watching in-app ads when they receive a reward [1].

Feature insights:
Monetization (in-app purchases)

Strategy games have high player lifetime value (LTV) and revenue per install (RPI) figures in comparison to other genres. This is a sum of many factors, but in general Strategy games utilize a wide array of different monetization features. Moreover, the competitive nature of these games tend to increase user spending, especially among top tier players.

BASIC FEATURES
(COMMON ACROSS ALL STRATEGY GAMES)

Basic monetization features for Strategy games include various resource generation boosts, construction and unit training speed-ups and limited-time in-app purchase bundle offers. Also, almost all Strategy games have some sort of loot boxes to purchase, often containing different ingredient items for crafting or boost items to amplify resource generation.
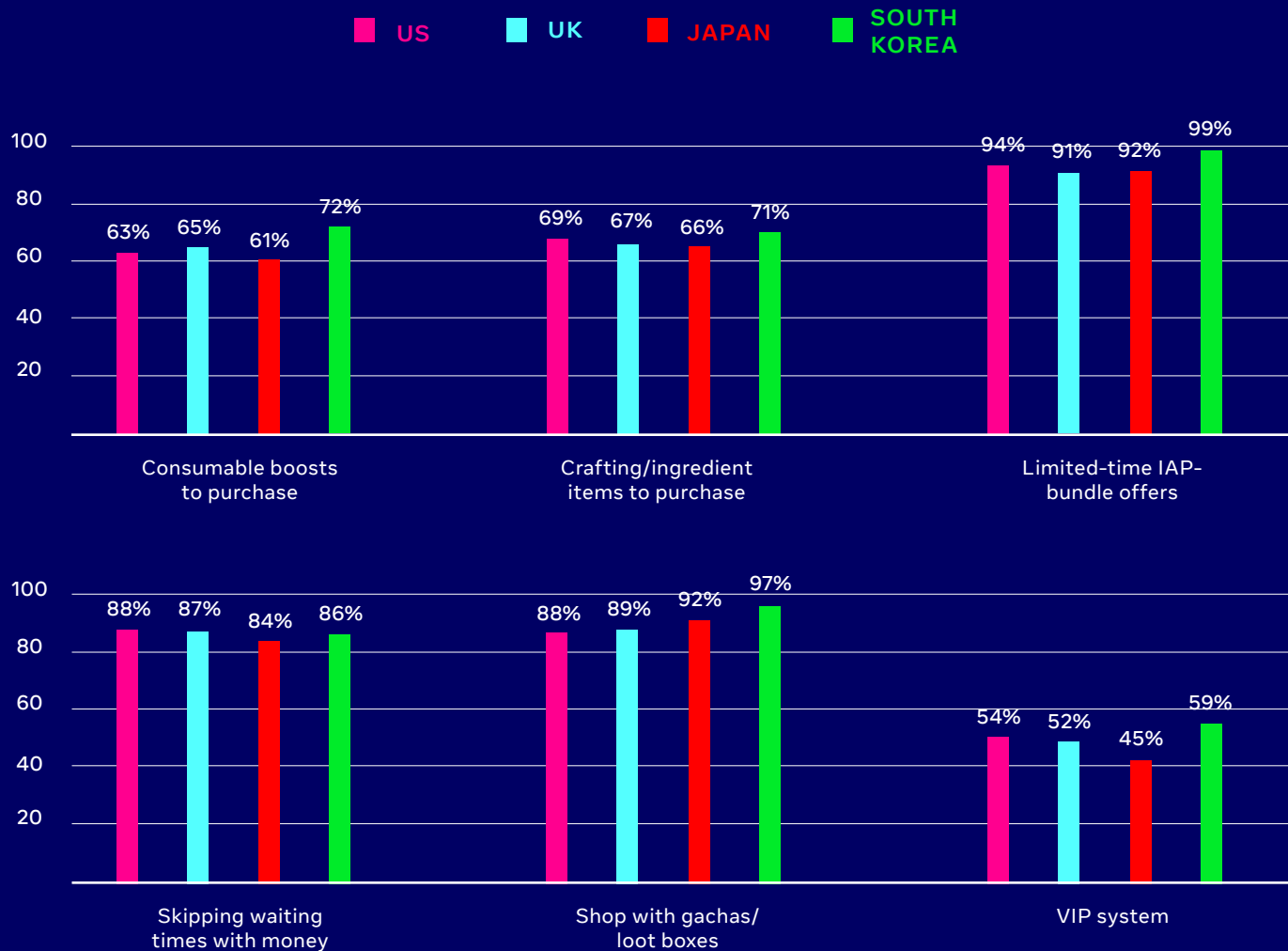
■ **US**   ■ **UK**   ■ **JAPAN**   ■ **SOUTH KOREA**

Chart 1

	US	UK	JAPAN	SOUTH KOREA
Consumable boosts to purchase	63%	65%	61%	72%
Crafting/ingredient items to purchase	69%	67%	66%	71%
Limited-time IAP-bundle offers	94%	91%	92%	99%

Chart 2

	US	UK	JAPAN	SOUTH KOREA
Skipping waiting times with money	88%	87%	84%	86%
Shop with gachas/loot boxes	88%	89%	92%	97%
VIP system	54%	52%	45%	59%

KEY FEATURES
(TOP STRATEGY GAMES WIN WITH THESE)

The most recent hot key feature for top Strategy games has been the battle pass system, a season-based subscription that revolves around getting rewards for completing season tasks. Other features that set the top 20% of Strategy games apart from the remaining 80% include characters (and their equipment items) to purchase, permanent boosts and the possibility to trade resources or items with other players.

According to data, the following three key features are especially good success drivers, as they are utilized much more by the best performing Strategy games compared to the rest.

■ **Top 20%* utilization**   ■ **Overall utilization**

21%	49%	69%	92%	52%	71%

BATTLE PASS PLAN

CHARACTERS TO PURCHASE

GEAR TO PURCHASE
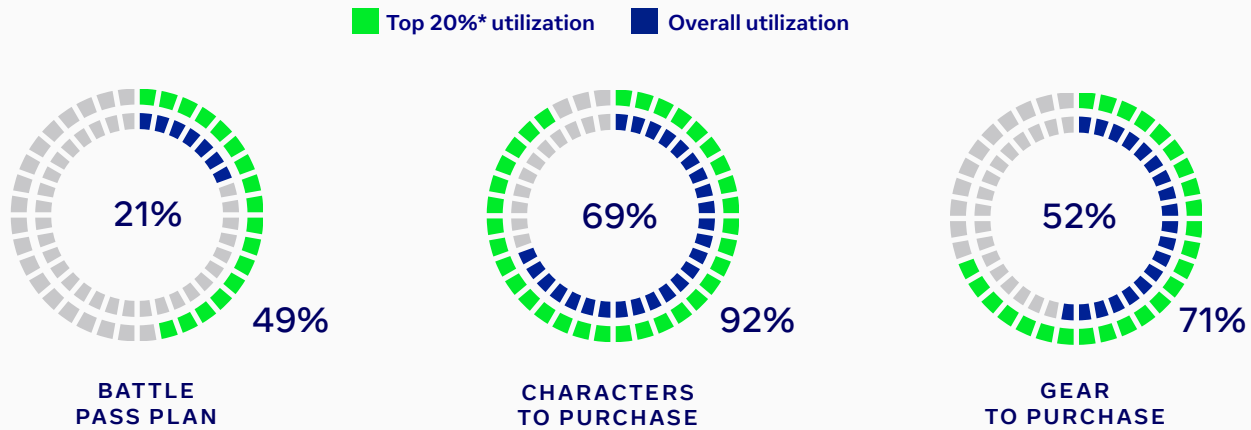
Source: GameRefinery data based on statistical sampling of iOS top grossing 10,000 games in US, UK, Japan and South Korea, Q1 2020

*Top grossing fifth of all Strategy games in US, KR, JP, UK

RISE OF KINGDOMS - LUCERNE SCROLLS

BATTLE PASS SYSTEM

Lately, the Battle Pass system has made its way into mobile games all across genres and Strategy games are no exception.

The strength of BPS is that it offers meaningful, changing content from season to season without meddling too much with the actual gameplay experience and overall game balance. Also, players who purchase the premium layer often play more to unlock the rewards they're entitled to.
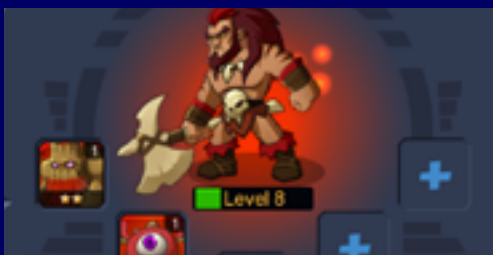
BRUTAL AGE - HEROES

CHARACTERS TO PURCHASE

In the top Strategy games it's normal to see an "RPG layer", where players can purchase and upgrade various hero characters who enhance their capabilities across the game.

The added character layer not only increases the horizontal depth of these games, but also introduces an additional, meaningful in-app purchase sink players can spend currency & resources on.

KING OF AVALON - ARTIFACTS

GEAR TO PURCHASE

Adding to the already rich meta of Strategy games, gear items bring a nice extra layer for players to improve their powers in. Usually these gear items are attached to either your player or separate hero characters and they come with different rarity classes with scaling power levels.

Together with crafting and salvaging mechanics, gear items can be a nice boost to any Strategy game's economy and monetization structure.

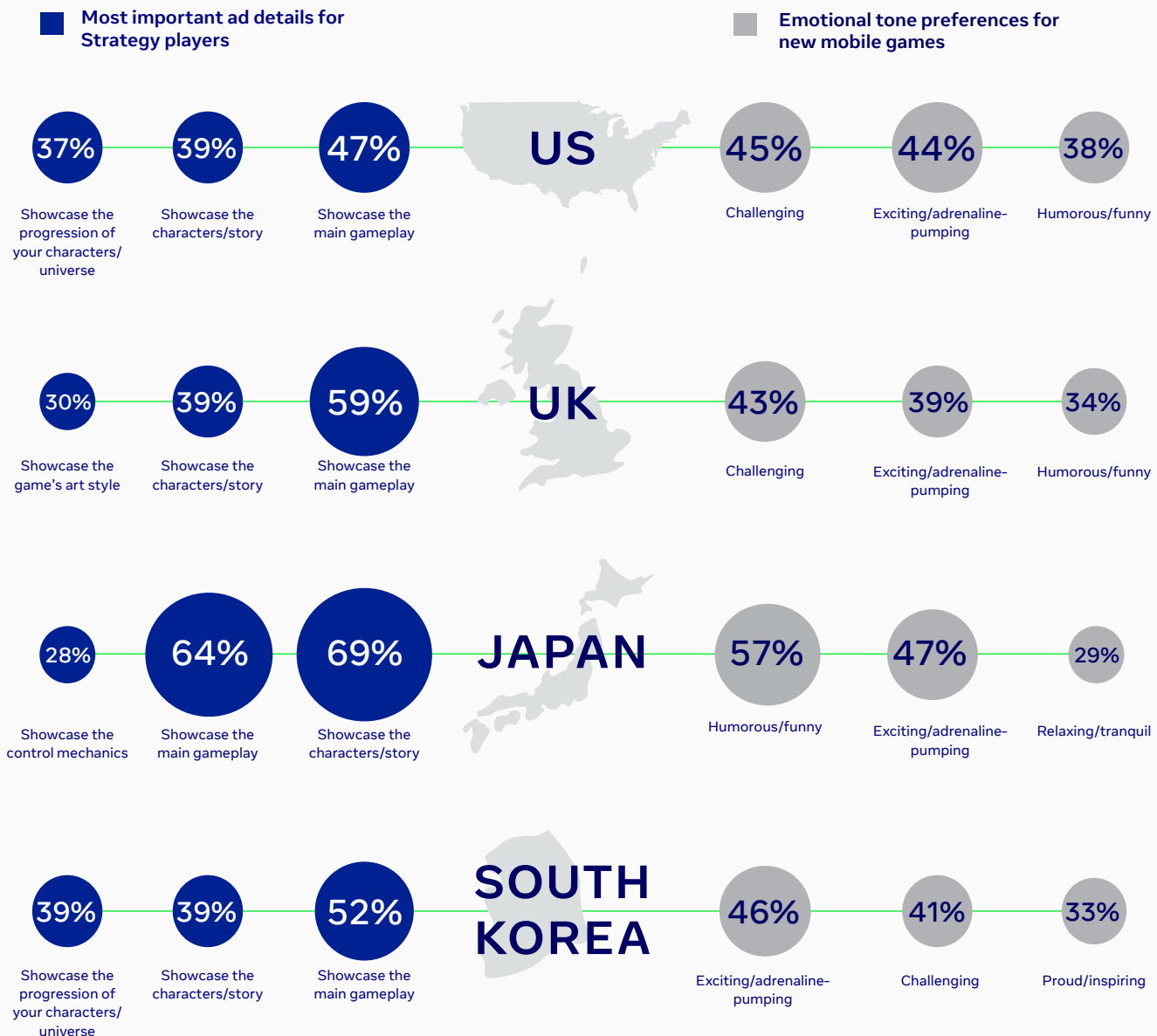# Creating an effective ad strategy

Over 6 in 10 Strategy players across the US, UK, South Korea and Japan are willing to take the time to learn how to play a new game if an advertisement makes it look appealing enough.

To capture attention, marketers should include the most relevant messaging and tone. Effective ads that attract Strategy players are ones that showcase the main gameplay and the characters/storyline. Strategy players also want to see ads for new mobile games that communicate challenging and adrenaline-pumping tones. Interestingly, Japanese Strategy players are more likely to prefer humorous ads with 57% saying they prefer this tone compared to 38% of Strategy players in the US and 34% in the UK. South Korean players are more likely to respond to proud and inspiring tones in ads.

■ **Most important ad details for Strategy players**

■ **Emotional tone preferences for new mobile games**

US

37%	39%	47%		45%	44%	38%
Showcase the progression of your characters/ universe	Showcase the characters/story	Showcase the main gameplay		Challenging	Exciting/adrenaline-pumping	Humorous/funny

UK

30%	39%	59%		43%	39%	34%
Showcase the game's art style	Showcase the characters/story	Showcase the main gameplay		Challenging	Exciting/adrenaline-pumping	Humorous/funny

JAPAN

28%	64%	69%		57%	47%	29%
Showcase the control mechanics	Showcase the main gameplay	Showcase the characters/story		Humorous/funny	Exciting/adrenaline-pumping	Relaxing/tranquil

SOUTH KOREA

39%	39%	52%		46%	41%	33%
Showcase the progression of your characters/ universe	Showcase the characters/story	Showcase the main gameplay		Exciting/adrenaline-pumping	Challenging	Proud/inspiring

Source: "Mobile Gaming Genre Study" by Interpret (Facebook IQ-commissioned online survey of 13,412 mobile games ages 18+ across AU, BR, CA, DE, FR, ID, IN, JP, KR, UK, US, Nov–Dec 2019)

This ad for PONOS' The Battle Cats highlights the game's art style in typography as background while showcasing a series of characters in a quick, intriguing way. This style helps potential players understand the game's tone of voice and arouses their curiosity.
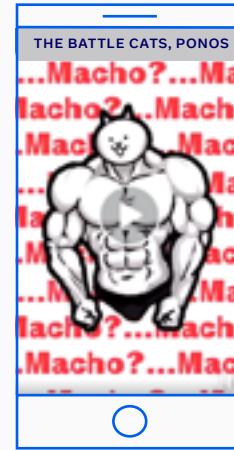
THE BATTLE CATS, PONOS

Bringing back lapsed players

Implementing an effective ad strategy can not only attract new Strategy players, but can also bring back inactive players. Over 90% of Strategy players in the UK and US say they would be open to going back to playing a Strategy game that they haven't played in the last 30 days.

Communicating new content or updates can help re-engage Strategy players in the US, UK and Japan with about 4 in 10 saying this type of content would be influential. Offering rewards for coming back is particularly relevant for South Korean Strategy players as 40% would consider returning to a game if this was the case.

WHAT COULD INFLUENCE STRATEGY PLAYERS TO RETURN OR RE-DOWNLOAD A GAME THEY HAVEN'T PLAYED IN 30 DAYS

US	UK	JAPAN	SOUTH KOREA
43% Hearing about new content or available updates	**40%** Hearing about new content or available updates	**36%** Hearing about new content or available updates	**40%** A reward for coming back
32% A reward for coming back	**35%** A reward for coming back	**21%** Someone bringing up the game in an in-person conversation	**37%** Hearing about new content or available updates
29% Someone online inviting them to play the game with them	**29%** Someone online inviting them to play the game with them	**19%** A reward for coming back	**24%** Someone online inviting them to play the game with them

02
RPG

RPG executive summary

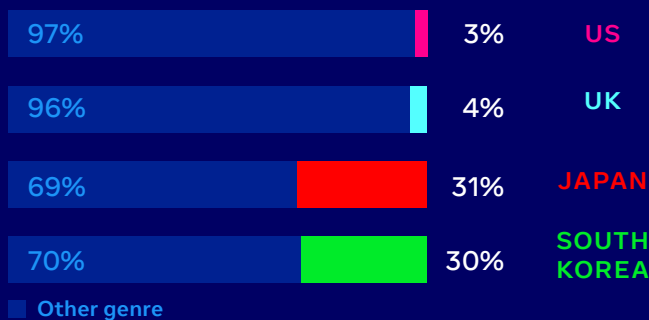|	INSIGHT	TAKEAWAY
1 GENRE FULFILLMENT	Character immersion, feeling accomplished and being dazzled by uniqueness are key gaming motivations for RPG players, but these players say the genre sometimes falls short in delivering on these needs.	To increase retention, consider including features that evoke a sense of accomplishment with low increments in game progression such as event versions of characters, special live event currency and multiple level-up types for characters.
2 COMMUNITY	RPG players are more likely to engage with others both during and outside of gameplay and welcome communication from gaming brands/developers.	A comprehensive social feature framework is crucial for long-term success in this competitive genre, so explore features like co-op PvE modes, several different PvP modes and special social currency.
3 MONETIZATION	RPG is the top mobile gaming genre in which Japanese and South Korean players make in-app purchases (IAP). Although IAPs are more common, RPG players are also receptive to in-app ads.	Since IAPs are usually concentrated on character collection and development, consider features like 5 or more different gachas, bulk discount gachas and 50+ different characters.
4 AD PREFERENCES	Marketing that communicates challenging, adrenaline-pumping tones and showcases the characters/storyline progression can resonate with RPG players. Japanese players are particularly interested in seeing the game's art styles in ads as well.	Marketers can reach RPG players by personalizing communications to the nuances of each market and individual gamer.

State of RPG games

Role-playing games (RPG) are all about controlling, customizing and developing characters to defeat enemies, and include sub-genres such as Action RPG, Fighting, MMORPG, Puzzle and Idle RPG. Of the countries surveyed, they are most popular in Japan and South Korea with over 4 in 10 mobile gamers playing RPG games.

While they are less popular in the US and UK, still over 1 in 4 mobile gamers in these markets play games in this genre. Within the RPG genre, Japanese and South Korean mobile gamers show nuances on their favorite sub-genres; Puzzle RPG is preferred among Japanese players while Action RPG/MMORPG is more common in South Korea.

RPG MOBILE GAMING PLAYERSHIP[1]
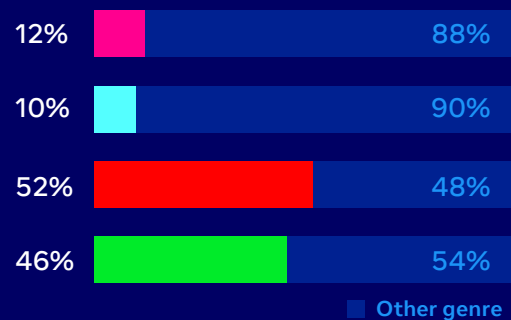
SOUTH KOREA
40%

UK
27%

JAPAN
43%

US
30%

SHARE OF DOWNLOADS BY COUNTRY[2]

97%	3%	US
96%	4%	UK
69%	31%	JAPAN
70%	30%	SOUTH KOREA

■ Other genre

SHARE OF REVENUE BY COUNTRY[2]

US	12%	88%
UK	10%	90%
JAPAN	52%	48%
SOUTH KOREA	46%	54%

■ Other genre

Who are RPG players?

RPG players share many similar traits to Strategy players such as skewing younger and more male when compared to the average gamer in each market. They typically spend longer periods of time playing games, and are more likely to try new games. They enjoy interacting with others during gameplay and see gaming as a core part of their identities.

US   **UK**

GENDER AND AGE

	US	UK
	62% are male	63% are male
	65% are 18–34 years old	68% are 25–44 years old

AVERAGE NUMBER OF GAMES PLAYED

3.4   3.2

SAY THEIR TYPICAL PLAY SESSION LASTS OVER 30 MINS

68%   55%

MORE LIKELY TO SELF-IDENTIFY AS "GAMERS"

1.6x   1.8x

WHY THEY PLAY MOBILE GAMES

56%   45%

say immersing themselves in another character or world is what makes mobile gaming very appealing

say immersing themselves in another character or world is what makes mobile gaming very appealing

MORE LIKELY TO PREFER MULTIPLAYER ONLINE MODES

1.4x   1.7x

Who are RPG players?

■ JAPAN   ■ SOUTH KOREA

GENDER AND AGE

60% are male

Over 60% Turn-Based RPG and Action RPG/ MMORPG players are 25-44 years old while 61% of Puzzle RPG players are 35 to 54

59% are male

66% are 25-44 years old

AVERAGE NUMBER OF GAMES PLAYED

3

3

SAY THEIR TYPICAL PLAY SESSION LASTS OVER 30 MINS

30 MIN

ACTION RPG/ MMORPG   TURN-BASED   PUZZLE

74% / 67% / 44%

73%

MORE LIKELY TO SELF-IDENTIFY AS "GAMERS"

1.3 to 1.5x

1.3x

WHY THEY PLAY MOBILE GAMES

ACTION RPG/ MMORPG   TURN-BASED   PUZZLE

56% / 52% / 39%

players say immersing themselves in another character/world is what makes mobile gaming very appealing

34%

say being dazzled by something unique is what makes mobile gaming very appealing

MORE LIKELY TO PREFER MULTIPLAYER ONLINE MODES

ACTION RPG/ MMORPG

1.6x

1.2x

Source: "Mobile Gaming Genre Study" by Interpret (Facebook IQ-commissioned online survey of 13,412 mobile games ages 18+ across AU, BR, CA, DE, FR, ID, IN, JP, KR, UK, US, Nov–Dec 2019)

Genre fulfillment

Understand player motivations and how to deliver on them

Why people play

Beyond relieving stress and as a way to spend time, RPG players enjoy playing mobile games to immerse themselves in another character or world and to feel accomplished. RPG players also feel that this genre often delivers on motivations like being dazzled by something unique and allowing players to defeat others in competition.

Interestingly, RPG players in the US feel that the current RPG games they play underdeliver on immersing them into another character or world while UK players feel there needs to be improvement in connecting them to people they know.

■ **Very important reasons RPG players enjoy mobile gaming**

■ **How well RPG games provide this**

Relieving stress	71%
	54%
Passing time	62%
	59%
Immersing myself in another character/world	56%
	47%
Being dazzled by something unique	51%
	47%
Defeating others in competition	48%
	54%
Feeling accomplished for completing something challeging	46%
	46%

US

While 56% of RPG players in the US play games to immerse themselves into another character or world, only 47% feel current RPG mobile games deliver on this.

Relieving stress	57%
	49%
Passing time	51%
	49%
Feeling accomplished for completing something challeging	49%
	42%
Immersing myself in another character/world	45%
	40%
Connecting with people I know	39%
	33%
Learning something that can benefit me outside of gaming	38%
	28%

UK

While 39% of RPG players in the UK play games to connect with other people they know, only 33% feel current RPG mobile games deliver on this.

Relieving stress	57%
	38%
Feeling accomplished for completing something challeging	35%
	32%
Being dazzled by something unique	34%
	35%
Defeating others in competition	33%
	32%
Passing time	29%
	35%
Immersing myself in another character/world	28%
	28%

SOUTH KOREA

While 57% of RPG players in South Korea play games to relieve stress, only 38% feel current RPG mobile games deliver on this.

Source: "Mobile Gaming Genre Study" by Interpret (Facebook IQ-commissioned online survey of 13,412 mobile games ages 18+ across AU, BR, CA, DE, FR, ID, IN, JP, KR, UK, US, Nov–Dec 2019)
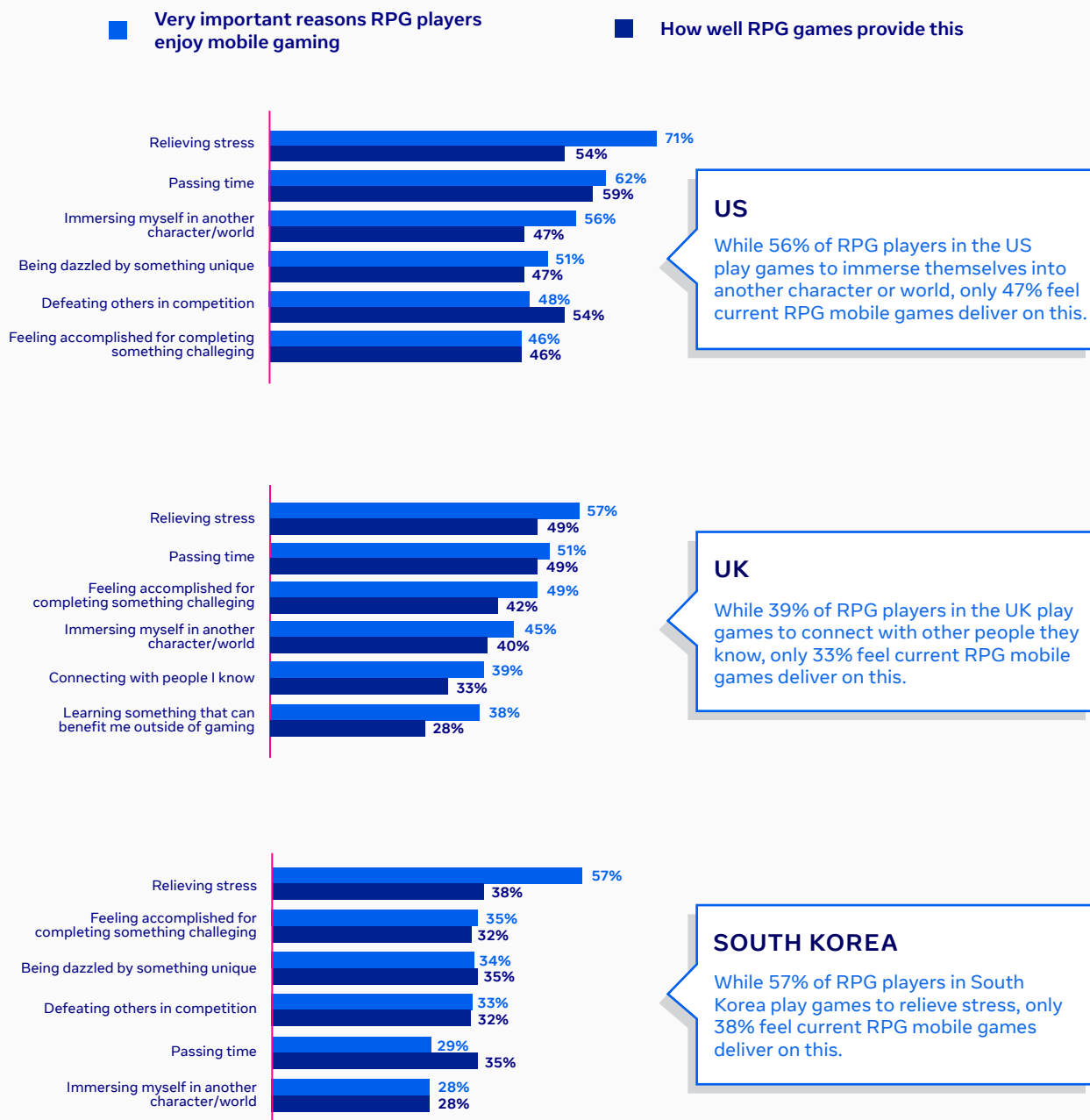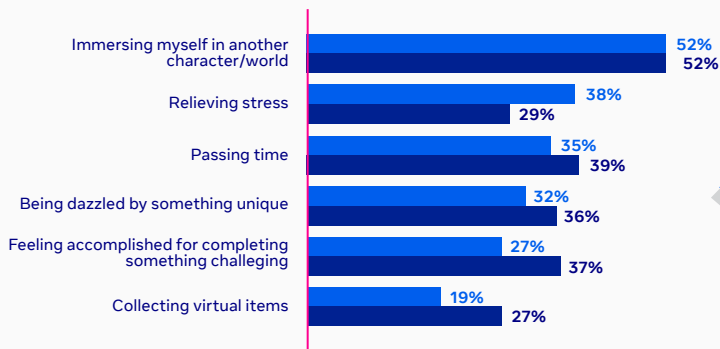
In Japan, we see some interesting difference in fulfillment by sub-genre. Turn-Based RPG games are exceeding expectations in several ways such as enabling players to feel accomplished and collect virtual items. On the other hand, Puzzle RPG games have the opportunity to improve character/world immersion as well as dazzling players with something unique.

■ **Very important reasons RPG players enjoy mobile gaming**   ■ **How well RPG games provide this**
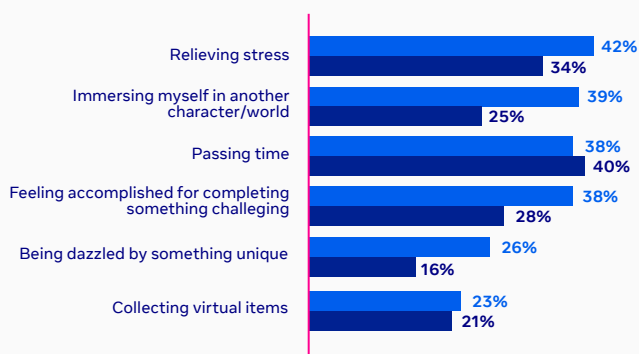
TURN-BASED RPG

Reason	Very important	How well provided
Immersing myself in another character/world	52%	52%
Relieving stress	38%	29%
Passing time	35%	39%
Being dazzled by something unique	32%	36%
Feeling accomplished for completing something challeging	27%	37%
Collecting virtual items	19%	27%

JAPAN

While 38% of Turn-Based RPG players in Japan play games to relieve stress, only 29% feel current RPG mobile games deliver on this.

PUZZLE RPG
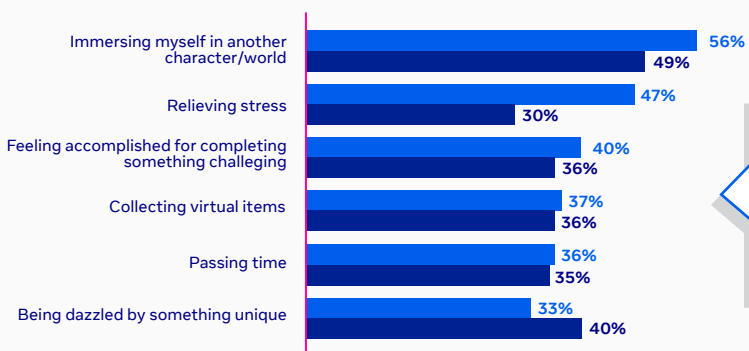
Reason	Very important	How well provided
Relieving stress	42%	34%
Immersing myself in another character/world	39%	25%
Passing time	38%	40%
Feeling accomplished for completing something challeging	38%	28%
Being dazzled by something unique	26%	16%
Collecting virtual items	23%	21%

JAPAN

While 39% of Puzzle RPG players in Japan play games to immerse themselves into another character or world, only 25% feel current RPG mobile games deliver on this.

ACTION RPG/MMORPG

Reason	Very important	How well provided
Immersing myself in another character/world	56%	49%
Relieving stress	47%	30%
Feeling accomplished for completing something challeging	40%	36%
Collecting virtual items	37%	36%
Passing time	36%	35%
Being dazzled by something unique	33%	40%

JAPAN

While 47% of Action RPG/MMORPG players in Japan play games to relieve stress, only 30% feel current RPG mobile games deliver on this.

Why people stray

When games don't deliver on the key motivations we just mentioned, it can lead to higher churn rates. Most RPG players cite boredom and repetitiveness as the main reasons why they've abandoned RPG games. Meanwhile, in South Korea, over a third of RPG players have quit a game because it was pushing in-app purchases too aggressively. In Japan, a quarter of Puzzle RPG players have stopped playing a game because it was too difficult.

To fulfill their varying gaming needs, RPG players are also playing other genres. In Western markets like the US and UK, we see RPG players migrating into the more Casual genre space with players in both markets recently installing Puzzle and Hyper-Casual titles. South Korea RPG players remain largely within the midcore space, playing action and Strategy games in addition to RPG.

■ **Top reasons RPG players stop playing RPG games[1]**

■ **Top genres installed by RPG mobile gamers[2]***

US

37%
I get bored with the game

22%
Ads that are too frequent

21%
I'm not making any progress, or progress is too slow

- Hyper-Casual
- Puzzle
- Action

UK

31%
I get bored with the game

24%
I finished the game

24%
The game is too repetitive

- Hyper-Casual
- Puzzle
- Simulation

SOUTH KOREA

40%
I get bored with the game

36%
The game is too aggressive with pushing in-app purchases

34%
The game is too repetitive

- Role Playing
- Action
- Strategy

JAPAN

Turn-Based RPG

63%
I get bored with the game

29%
I'm not making any progress, or progress is too slow

26%
The game is too repetitive

Puzzle RPG

49%
I get bored with the game

25%
The game is too difficult

18%
I'm not making any progress, or progress is too slow

- Role Playing
- Action
- Puzzle

Action RPG/MMORPG

42%
I get bored with the game

31%
I'm not making any progress, or progress is too slow

25%
The game is too buggy and crashes

Feature insights: Genre fulfillment

To keep RPG players engaged and increase retention, there should be enough exciting content for them to dwell in. Moreover, it's important to give players a sense of accomplishment with low increments in game progression.
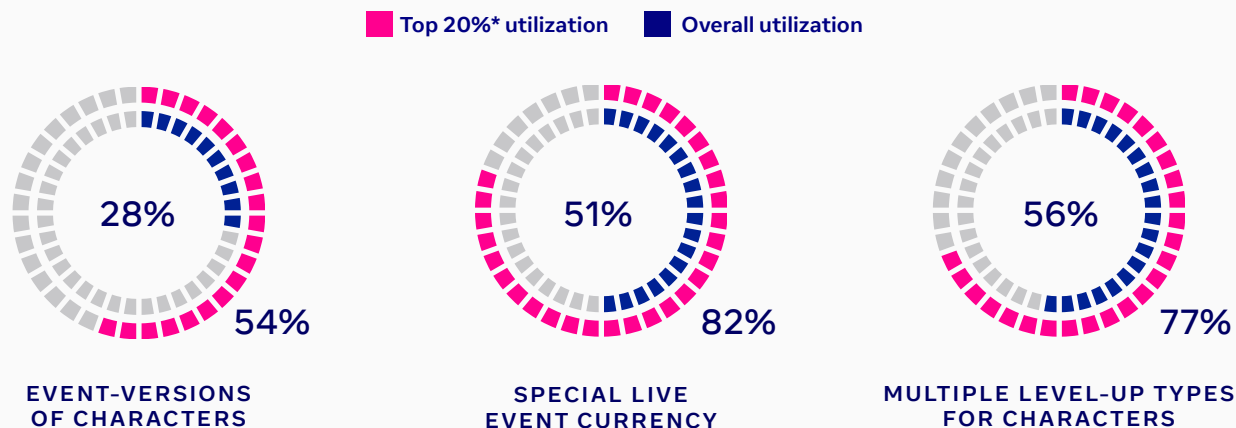
BASIC FEATURES
(COMMON ACROSS ALL RPG GAMES)

In general, all RPG games revolve around either turn-based or real-time combat supported by an extensive character development meta layer. This is reflected in the high utilization of collection and crafting features that support the core loop. If done right, this combination can counter boredom and significantly boost the sense of accomplishment sought by players. To further avoid repetitiveness, most RPGs use recurring and non-recurring live events to increase game diversity and introduce new, exciting content.
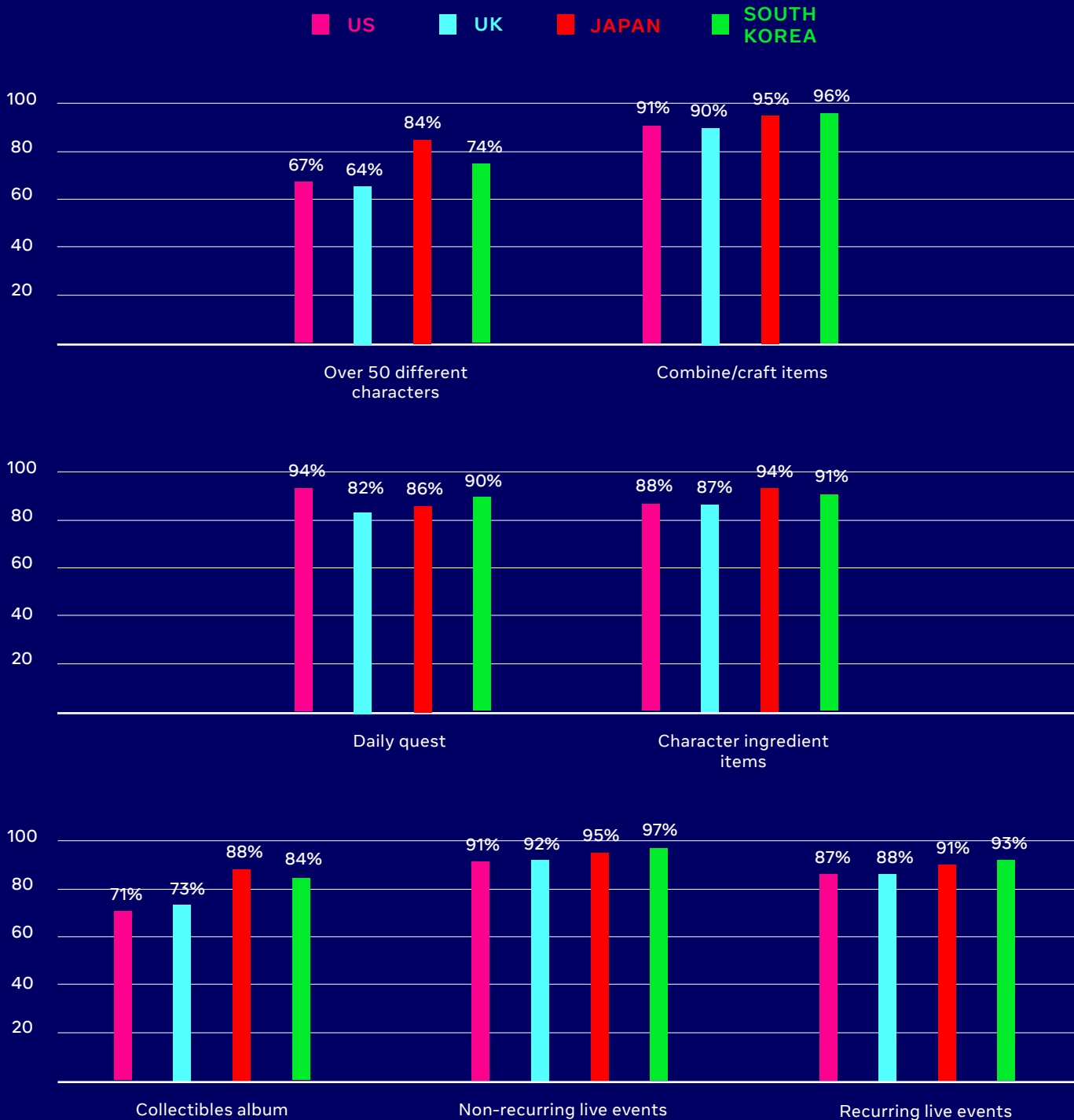
Legend: US | UK | JAPAN | SOUTH KOREA

Over 50 different characters: US 67%, UK 64%, Japan 84%, South Korea 74%
Combine/craft items: US 91%, UK 90%, Japan 95%, South Korea 96%

Daily quest: US 94%, UK 82%, Japan 86%, South Korea 90%
Character ingredient items: US 88%, UK 87%, Japan 94%, South Korea 91%

Collectibles album: US 71%, UK 73%, Japan 88%, South Korea 84%
Non-recurring live events: US 91%, UK 92%, Japan 95%, South Korea 97%
Recurring live events: US 87%, UK 88%, Japan 91%, South Korea 93%

Source: GameRefinery data based on statistical sampling of iOS top grossing 10,000 games in US, UK, Japan and South Korea, Q1 2020

KEY FEATURES
(TOP RPG GAMES WIN WITH THESE)

If we focus on the top-grossing RPGs of all types, there are certain features that set them apart from RPGs with less commercial success. These key features lean heavily towards live events and characters – cornerstones of any RPG title in the current market. Having enough depth and progression in character development has also become important to keep players interested and wanting to advance further in the game.

■ **Top 20%* utilization**   ■ **Overall utilization**

28% / **54%**

EVENT-VERSIONS OF CHARACTERS

51% / **82%**

SPECIAL LIVE EVENT CURRENCY

56% / **77%**

MULTIPLE LEVEL-UP TYPES FOR CHARACTERS

Source: GameRefinery data based on statistical sampling of iOS top grossing 10,000 games in US, UK, Japan and South Korea, Q1 2020

*Top grossing fifth of all RPG games in US, KR, JP, UK

LOONEY TUNES – SIEGFRID ELMER

HERO WARS – SEBASTIAN COINS

AFK ARENA

EVENT VERSIONS OF CHARACTERS

Being able to obtain exclusive special versions of the game's characters during live events is something very common among top RPGs.

The power of event versions of characters comes from the collectible nature of many RPGs and players specializing in certain character combinations. This in turn forms an emotional bond to the character roster and when a new event version of players' favorite character hits the store, they're much more likely to participate, engage and enjoy.

SPECIAL LIVE EVENT CURRENCY

Live events are one of the primary methods to inject diversity, excitement and new content to RPGs today. A growing number of top games have started using special event currency, acquirable through participating in various event activities to boost events' unique feel even further.

Event currency brings more depth to an event's economy and "separates" the event loop from normal gameplay. As a result, events can grow to become almost their own game universes – something that players are eagerly waiting to get their hands on time and time again.

MULTIPLE LEVEL-UP TYPES FOR CHARACTERS

Character development is an integral part of any RPG and a key indicator of players' progression within the game. Accordingly, most top RPGs around the world have several level-up types available to make characters stronger.

Having as many as three ways (each with their own requirements and materials needed) to upgrade your hero increases the depth of character progression significantly.

Community

Community in RPG games

Compared to the general mobile gaming population, RPG players are highly engaged in social activities related to the genre. Three-quarters of RPG players in the US and 79% in the UK have engaged in some kind of social activity related to the genre, such as watching live streams of RPG games or looking at other players' scores and achievements online. In Japan, Action RPG/MMORPG and Turn-Based RPG players are more socially-engaged than Puzzle RPG players with 67% and 63% respectively having engaged in social activities around the genre (compared to 53% of Puzzle RPG players).

Online communities are also an increasingly popular source of social interaction for RPG players. More than half of RPG players in the US, UK, Japan and South Korea visit a mobile gaming community weekly. This is particularly pronounced for Action RPG/MMORPG players in Japan with 65% leveraging online gaming communities at least once each week. There are also some interesting geographic differences in the motivations for using online communities. In the US, 48% of RPG players use these groups to learn about upcoming in-app events. In Japan, 46% of Action RPG/MMORPG players use these groups for entertaining gameplay content while 42% of Puzzle RPG players want to find ways to improve at the game.

SOCIAL/COMMUNITY ACTIVITIES THAT RPG PLAYERS HAVE DONE IN THE PAST THREE MONTHS

US

30%
Checked out other players' scores/ achievements online

28%
Viewed/liked/ commented on posts from people you don't know outside the game

27%
Watched a live stream of a RPG mobile game

UK

29%
Chatted online with people about RPG games

28%
Checked out other players' scores/ achievements online

26%
Viewed/liked/ commented on posts from a game/ company

SOUTH KOREA

32%
Viewed/liked/ commented on posts from a game/ company

31%
Checked out other players' scores/ achievements online

30%
Chatted online with people about RPG games

Source: "Mobile Gaming Genre Study" by Interpret (Facebook IQ-commissioned online survey of 13,412 mobile games ages 18+ across AU, BR, CA, DE, FR, ID, IN, JP, KR, UK, US, Nov–Dec 2019)

JAPAN

Turn-Based RPG

32%
Viewed/liked/commented on posts from a game/company

25%
Viewed/liked/commented on posts from people you don't know outside the game

21%
Watched a live stream of a RPG mobile game

Puzzle RPG

19%
Viewed/liked/commented on posts from a game/company

15%
Watched a live stream of a RPG mobile game

13%
Checked out other players' scores/achievements online

Action RPG/MMORPG

28%
Viewed/liked/commented on posts from a game/company

24%
Watched a live stream of a RPG mobile game

24%
Checked out other players' scores/achievements online
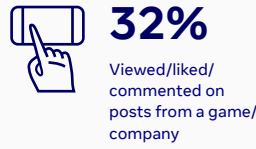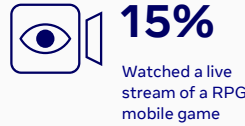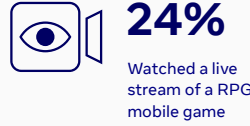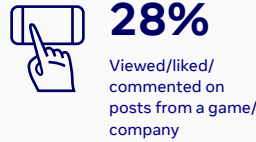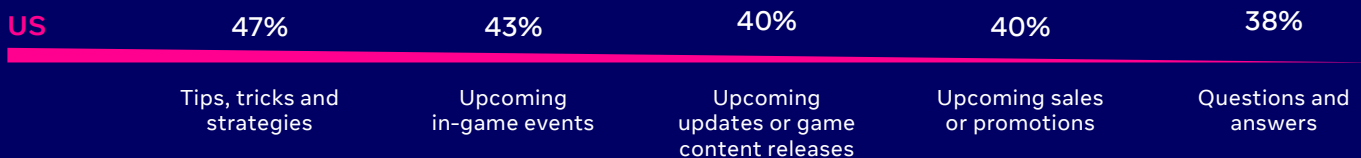

Perhaps unsurprisingly, RPG players also gravitate toward features that enable social interaction during gameplay. More than 4 in 10 RPG players in the UK and US and 51% of players in South Korea say they enjoy playing multiplayer online modes. Additionally, 43% of UK RPG players and over one-third of US players say they enjoy chatting with others during gameplay.
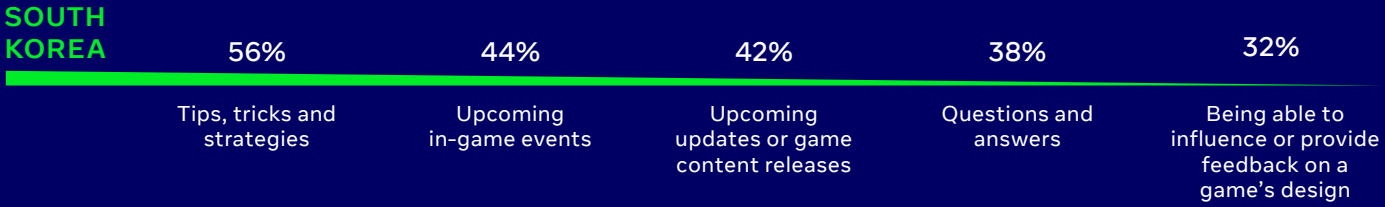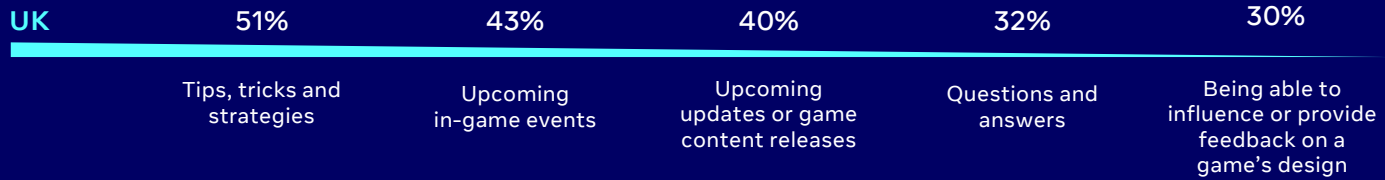
While the ability to play with others is important to RPG players, it's important to note that the majority of them are willing to try new games that their peer networks aren't playing. In fact, 69% of US RPG players and 61% of South Korean RPG players say they often play games that their friends aren't playing.

While RPG players tend to form communities organically, developers have the power to enhance communities by providing the right content. And RPG players are keen to hear from game developers with more than 8 in 10 players in Japan and the US saying they'd be open to some type of messaging from brands. Across markets, tips and tricks as well as information on upcoming in-app events are of particular interest to RPG players. Action RPG/MMORPG and Turn-Based RPG players show higher interest in behind-the-scenes content, and about one-third of RPG players in South Korea and the UK would like to be able to provide feedback on game designs.

INFORMATION RPG PLAYERS WANT TO RECEIVE FROM MOBILE GAMES/DEVELOPERS

US

47%	43%	40%	40%	38%
Tips, tricks and strategies	Upcoming in-game events	Upcoming updates or game content releases	Upcoming sales or promotions	Questions and answers

UK	51%	43%	40%	32%	30%
Tips, tricks and strategies	Upcoming in-game events	Upcoming updates or game content releases	Questions and answers	Being able to influence or provide feedback on a game's design

SOUTH KOREA	56%	44%	42%	38%	32%
Tips, tricks and strategies	Upcoming in-game events	Upcoming updates or game content releases	Questions and answers	Being able to influence or provide feedback on a game's design

JAPAN

Turn-Based RPG

54%	51%	39%	29%	27%
Upcoming updates or game content releases	Upcoming in-game events	Tips, tricks and strategies	Behind-the-scenes stories/diaries	Questions & answers

Puzzle RPG

47%	35%	34%	20%	20%
Tips, tricks and strategies	Upcoming in-game events	Upcoming updates or game content releases	Customer service/product support	Upcoming sales or promotions

Action RPG/ MMORPG

52%	46%	45%	26%	26%
Tips, tricks and strategies	Upcoming updates or game content releases	Upcoming in-game events	Behind-the-scenes stories/diaries	Customer service/product support

Feature insights: Community

Similar to Strategy, RPG players also value social engagement and communal activities to a very high degree. Therefore planning a comprehensive social feature framework is crucial for long-term success in this competitive genre.

BASIC FEATURES
(COMMON ACROSS ALL RPG GAMES)

The most commonly utilized social features in RPG games across regions are ladder-based PvP systems with AI-filtered matchmaking (as opposed to fighting anyone you want), guild mechanics and the possibility to aid fellow players directly in various ways. Also, social engagement is widely encouraged by giving players special rewards or benefits for joining guilds or participating in PvP-gaming (e.g. guild perks and boosts).
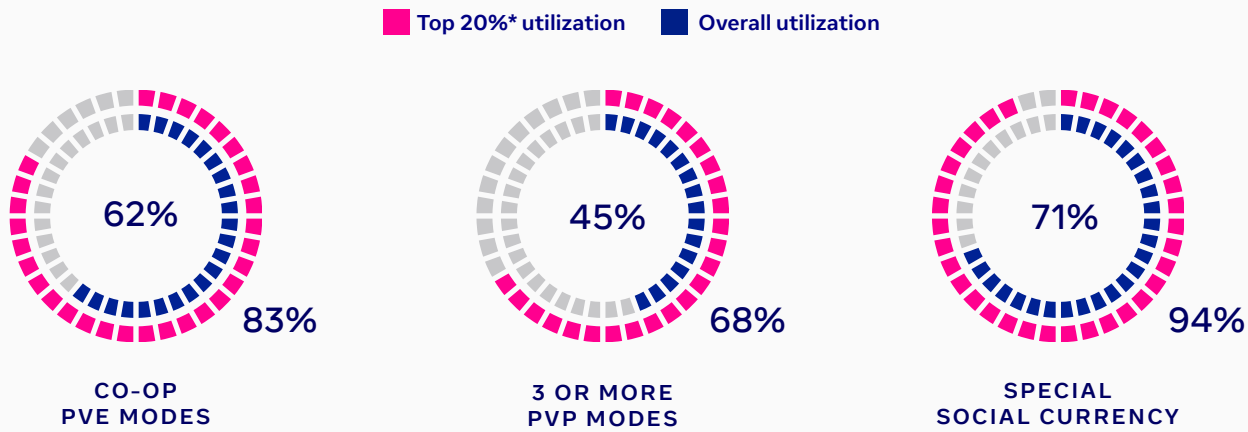
US   **UK**   **JAPAN**   **SOUTH KOREA**

Chart 1

Feature	US	UK	JAPAN	SOUTH KOREA
Ladder/season system in PvP	84%	83%	69%	86%
Filtered PvP matchmaking	75%	73%	61%	75%

Chart 2

Feature	US	UK	JAPAN	SOUTH KOREA
Special benefits from communal activities or PvP	94%	91%	95%	94%
Highscore lists/ leaderboards	88%	85%	87%	91%

Chart 3

Feature	US	UK	JAPAN	SOUTH KOREA
Chat/messaging	83%	84%	79%	87%
Send/ask help	76%	72%	82%	80%
Guild mechanics	86%	82%	76%	91%

Source: GameRefinery data based on statistical sampling of iOS top grossing 10,000 games in US, UK, Japan and South Korea, Q1 2020

KEY FEATURES
## (TOP RPG GAMES WIN WITH THESE)

Market data indicates that key differentiating features in the RPG genre include co-op PvE modes to boost the sense of togetherness, multiple PvP modes for added diversity in competitive playing, and special social currencies to build a "side economy" and give additional tangible reasons for players to participate in the social aspects of the game.

According to data, the following three key features are especially good success drivers, as they are utilized much more by the best performing RPG titles compared to the rest.

■ **Top 20%* utilization**   ■ **Overall utilization**

62%
83%

**CO-OP
PVE MODES**

45%
68%

**3 OR MORE
PVP MODES**

71%
94%

**SPECIAL
SOCIAL CURRENCY**

Source: GameRefinery data based on statistical sampling of iOS top grossing 10,000 games in US, UK, Japan and South Korea, Q1 2020

*Top grossing fifth of all RPG games in US, KR, JP, UK

**RAID: SHADOW LEGENDS -
CLAN BOSS (ASYNCHRONOUS PVE)**

CO-OP PVE MODES

Fighting monsters with other players is something that many RPG players love to do as it brings strategic depth and social dimension to the game.

Both asynchronous and synchronous co-ops are commonly used among top RPG titles. When looking at the various RPG sub-genres, MMORPGs usually favor synchronous live co-op while other RPGs tend to go with asynchronous modes.

SUMMONERS WAR
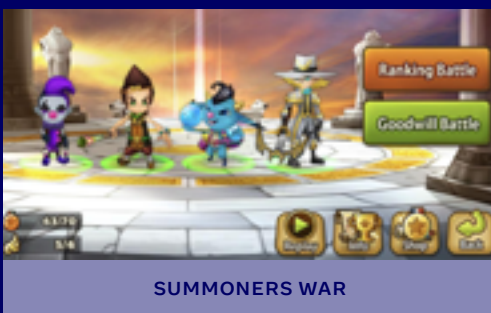
3 OR MORE PVP MODES

Player vs player action is one main element of RPG games across all regions. To keep players engaged and entertained, the top RPGs often have several different PvP modes for added variety

The usual combination is to have one "main" PvP arena and one or more co-op PvP-modes (e.g. guild wars) combined with special event PvP-instances.

AFK ARENA - COMPANION POINTS

SPECIAL SOCIAL CURRENCY

To reinforce the importance of social playing, the vast majority of top RPGs have introduced social currencies that are acquired through taking part in various social activities within the game.

One common sink for social currency are loot boxes which reward players with special collectibles (characters, items, decorations etc.) RPGs with PvP mechanics often use two types of social currencies: i) PvP currency and ii) guild/friend currency.

In-app purchases in RPG games

In Japan and South Korea, RPG is the top genre in which players make in-app purchases. Compared to other markets, players in these countries are also more likely to make a purchase monthly with 10.9% in South Korea and 9.3% in Japan having done so (compared to 5.4% of RPG players in the UK).[1]

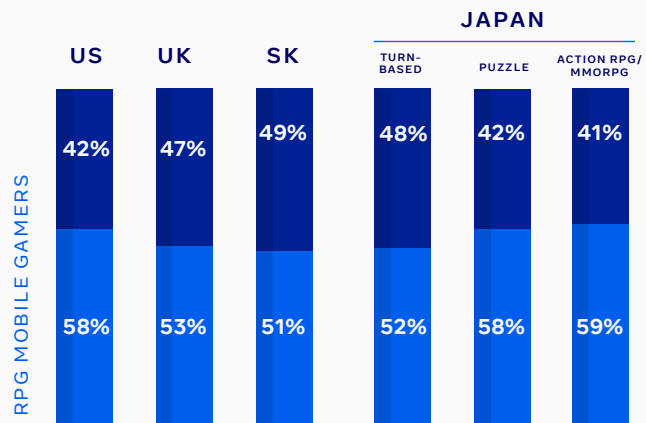**% OF PLAYERS WHO MAKE AN IN-APP PURCHASE IN A MONTH[1]**
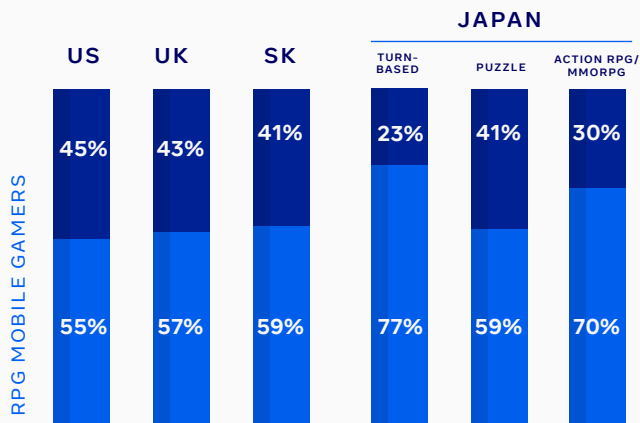
5.4%
UK

9.3%
JAPAN

6.5%
US

10.9%
SOUTH KOREA
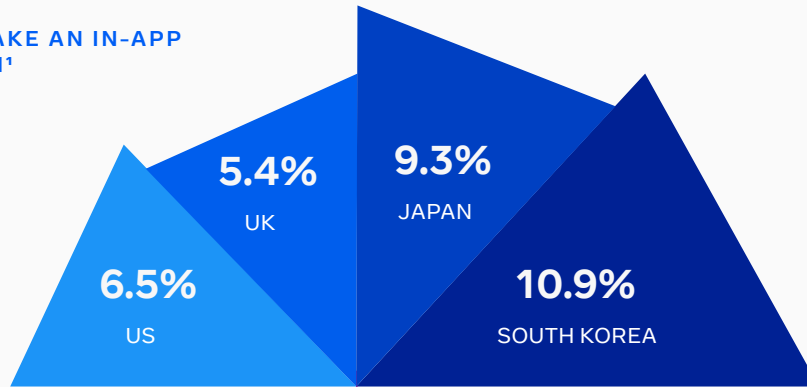
When it comes to in-app purchases, over half of RPG players prefer making purchases directly as opposed to ones having a random element. This is particularly emphasized for Turn-Based RPG and Action RPG/ MMORPG players in Japan with 77% and 70% respectively saying they prefer this type of purchase (compared to 55% of US RPG players).[2]

It's also interesting to note that over half of RPG players across all markets agree with pay-to-win options. Action RPG/MMORPG players in Japan are the most in favor of this type of purchase with 59% saying they support it.[2]

- ■ I prefer to make in-game purchases directly
- ■ I prefer in-game purchases with a random element (e.g. loot boxes)

- ■ In-game purchases can include items that help you win
- ■ In-game purchases should be limited to items that don't help you win

	US	UK	SK	JAPAN		
				TURN-BASED	PUZZLE	ACTION RPG/MMORPG
RPG MOBILE GAMERS	45%	43%	41%	23%	41%	30%
	55%	57%	59%	77%	59%	70%

	US	UK	SK	JAPAN		
				TURN-BASED	PUZZLE	ACTION RPG/MMORPG
RPG MOBILE GAMERS	42%	47%	49%	48%	42%	41%
	58%	53%	51%	52%	58%	59%

Incorporating ads into RPG games

Too much reliance on in-app purchases can risk turning RPG players away. More than one third of RPG players in South Korea and, 1 in 5 US players have abandoned an RPG mobile game because it was too aggressive with pushing in-app purchases.

To balance this, developers can implement a mixed monetization strategy, incorporating in-app ads. RPG players are open to this with around 9 in 10 players in Japan and 70% of players in the US saying they are okay with seeing in-app ads.[1]

## % OF RPG MOBILE GAMERS WHO ARE OPEN TO IN-APP ADS
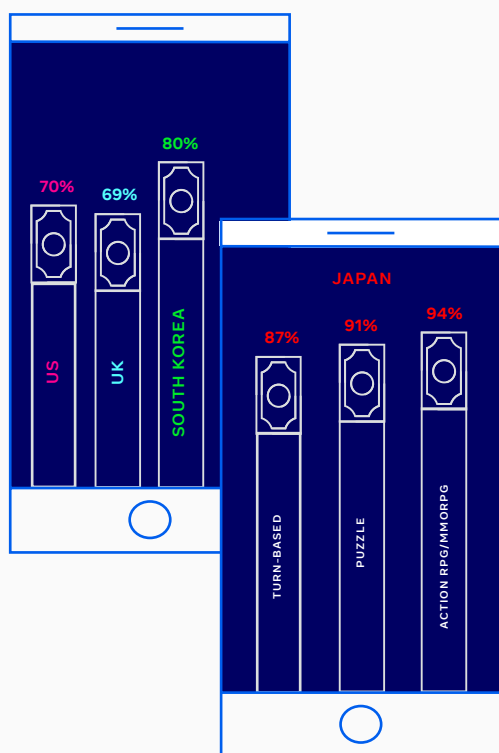
The number of mobile games with an ad SDK is on the rise according to App Annie, with 89% of the top downloaded games of 2019 having an ad SDK. Of the games with an ad SDK installed, Casual games accounted for the majority of downloads while core genres represented 76% **of time spent in games globally** — led by Strategy (29%) and RPG (23%).

The report also cited a case study with Mechanist Games who tested rewarded video when struggling to monetize solely through in-app purchases. Results showed that ad revenue increased in parallel with an increase in in-app purchases since rewarded video perks allowed players to try items they could later buy.[2]

For more information on incorporating ads into games, read the underlined full App Annie report on Facebook Audience Network.

SHARE OF GLOBAL TIME SPENT AMONG GAMES WITH ADVERTISING PLATFORM SDK BY GENRE[2]
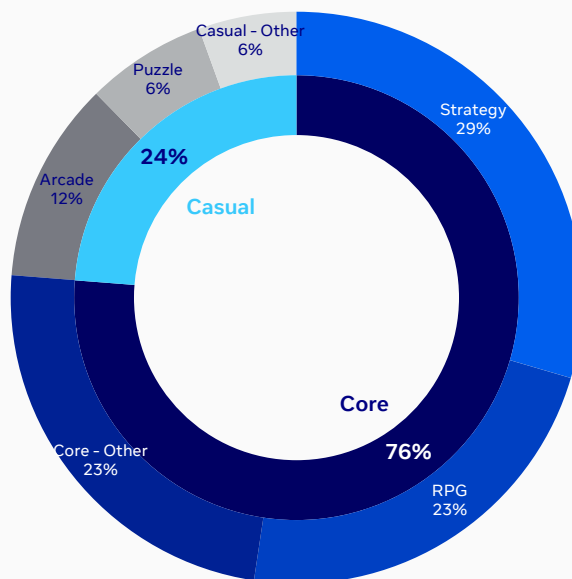
It's important to take into account player preferences for viewing in-app ads in order for it to provide value to the experience. Generally, RPG players prefer longer, less frequent ad breaks compared to shorter, more frequent ones. Over the course of 10 minutes of gameplay, 51% of Turn-Based RPG and Action RPG/MMORPG players in Japan would like to see one 30 second ad as opposed to shorter ad units with more frequent breaks. Incentivizing players to watch in-app ads can also be beneficial; 54% of South Korean RPG players say they prefer watching in-app ads when they receive a reward [1].

Feature insights: Monetization (IAP)

RPG games' in-app purchase (IAP) monetization is usually concentrated on character collection/development as those aspects play a pivotal role in players' success and progression in RPG games. Moreover, randomized loot boxes are still heavily used in all regions.

BASIC FEATURES (COMMON ACROSS ALL RPG GAMES)

Monetization of the meta layer stands out clearly when looking at basic monetization features utilized by RPGs across regions. In other words, being able to spend money on characters (often through shard mechanism) and gearing them up with equipment items is something players are used to in all RPGs. Core gameplay monetization, on the other hand, focuses mostly on revives when killed and skipping waiting times relating to energy mechanics.
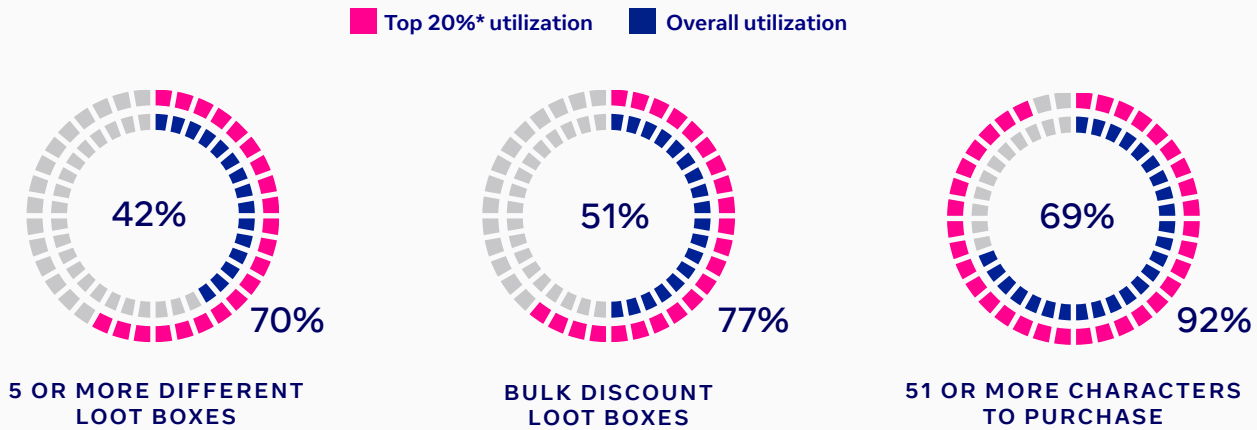
Legend: US | UK | JAPAN | SOUTH KOREA

Equipment items to purchase
- US: 85%
- UK: 85%
- Japan: 89%
- South Korea: 93%

Skipping waiting times with money
- US: 85%
- UK: 84%
- Japan: 90%
- South Korea: 84%

Limited time IAP-bundle offers
- US: 92%
- UK: 93%
- Japan: 85%
- South Korea: 96%

Character ingredient items to purchase
- US: 86%
- UK: 87%
- Japan: 94%
- South Korea: 96%

Shop with gachas/loot boxes
- US: 94%
- UK: 93%
- Japan: 98%
- South Korea: 97%

Consumable boosts to purchase
- US: 88%
- UK: 87%
- Japan: 89%
- South Korea: 90%

Continue/revive to purchase
- US: 58%
- UK: 57%
- Japan: 61%
- South Korea: 51%

Source: GameRefinery data based on statistical sampling of iOS top grossing 10,000 games in US, UK, Japan and South Korea, Q1 2020

KEY FEATURES
(TOP RPG GAMES WIN WITH THESE)

Nowadays most RPGs are using randomized loot boxes as the backbone of their in-app purchase monetization strategy. However, data indicates that having a wider variety of different loot boxes and a large roster of characters to collect set the top grossing RPGs apart from the others. Also, incentivizing the purchases of several loot boxes rolls at a time is an effective way of driving user spending.

Here's three key features that top RPGs utilize to stand out and drive their in-app purchase revenue:

Top 20%* utilization   **Overall utilization**

5 OR MORE DIFFERENT LOOT BOXES	BULK DISCOUNT LOOT BOXES	51 OR MORE CHARACTERS TO PURCHASE
42% / 70%	51% / 77%	69% / 92%

Source: GameRefinery data based on statistical sampling of iOS top grossing 10,000 games in US, UK, Japan and South Korea, Q1 2020

*Top grossing fifth of all RPG games in US, KR, JP, UK

5 OR MORE DIFFERENT LOOT BOXES

As stated earlier, loot box mechanics are very heavily used by RPGs and it could be argued that they've become de facto cornerstone of the genre's in-app purchase structure.

Top RPGs, however, are much more likely to have a wider selection of different loot boxes for players to purchase. Limited-time special loot boxes and event loot boxes are also used to increase spending on regular intervals.

BULK DISCOUNT LOOT BOXES

Games are constantly searching for ways to lower players' purchase thresholds. One method used by top grossing RPGs is so-called bulk discount loot box.

Bulk discount loot box incentivize players to buy more than one loot box pull at a time by giving them discounts or extra pulls. This added value is always clearly highlighted to players for maximum effect.

SEVEN DEADLY SINS
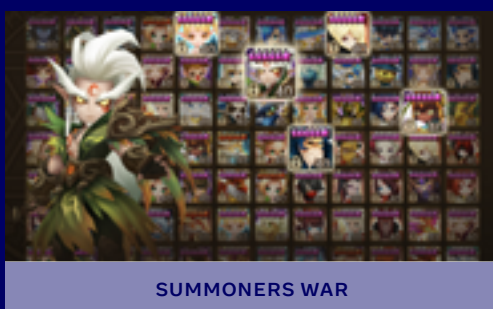
51 OR MORE DIFFERENT CHARACTERS TO PURCHASE

Having enough different characters to collect (and purchase) is something that significantly boosts RPGs' monetization potential.

This holds true especially with team-based RPGs where you control several characters at a time, but single-character focused RPGs (MMORPGs and Action RPGs) can implement wider character rosters through companion and pet mechanics.

SUMMONERS WAR

Ad preferences

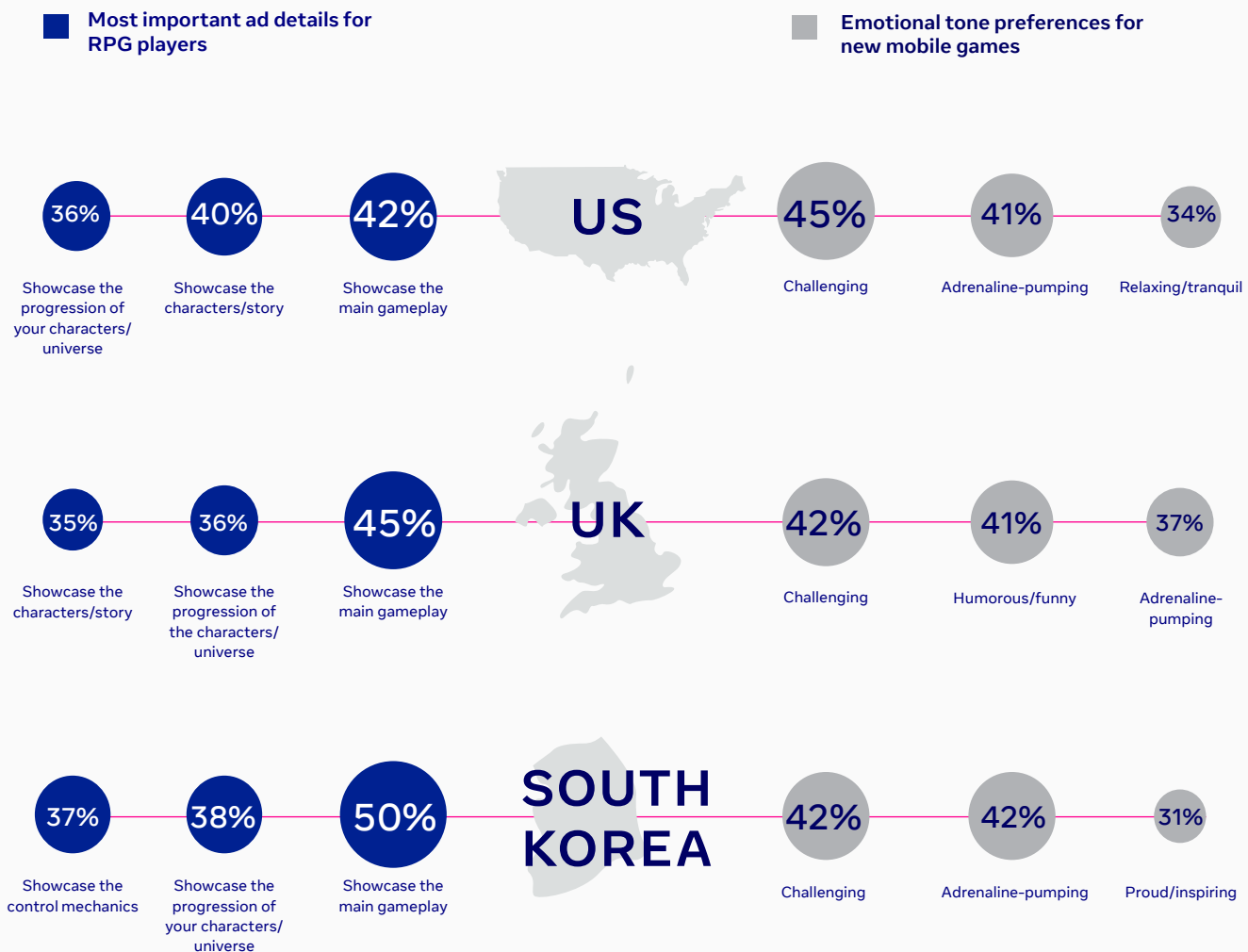## Entice people to try out new games and bring back players

Creating an effective ad strategy

Three-fourths of RPG players in the US and 67% of players in South Korea are willing to take the time to learn how to play a new game if an advertisement makes it look appealing enough.

To capture attention, it's important for marketers to include the most relevant messaging and tone. Effective ads that attract RPG players are ones that showcase the main gameplay and the characters/storyline. Characters are especially important in Japan, and they are also more likely to be interested in seeing the games' art style in advertisements. In fact, 70% of Turn-Based RPG players and 53% of Action RPG/MMO RPG players in Japan prefer mobile games with stylized art (compared to 41% of RPG players in the US).
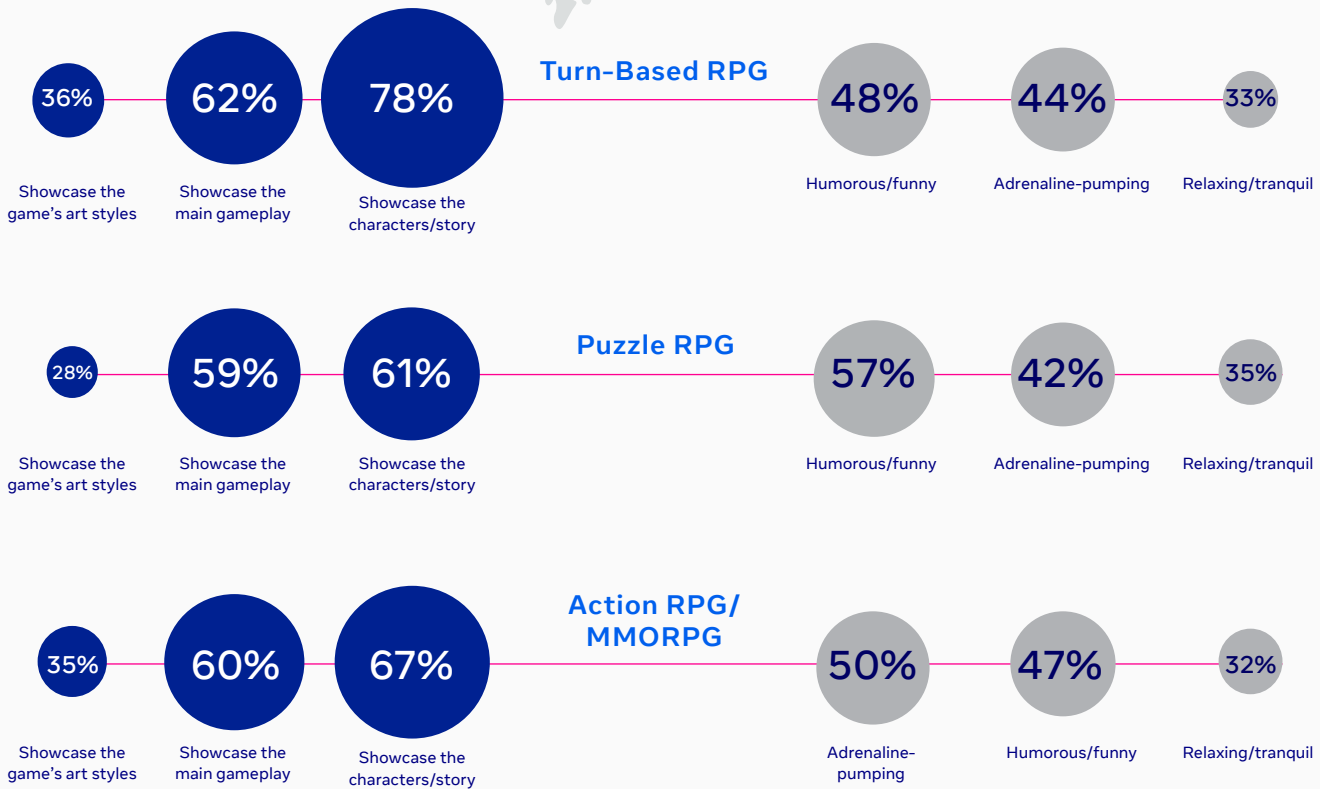
RPG players want ads for new mobile games that communicate challenging and adrenaline-pumping tones. Interestingly, Japanese RPG players (particularly Puzzle RPG players) are more likely to prefer humorous ads compared to players in the US, UK and South Korea.

■ **Most important ad details for RPG players**

■ **Emotional tone preferences for new mobile games**

US

36%	40%	42%		45%	41%	34%
Showcase the progression of your characters/ universe	Showcase the characters/story	Showcase the main gameplay		Challenging	Adrenaline-pumping	Relaxing/tranquil

UK

35%	36%	45%		42%	41%	37%
Showcase the characters/story	Showcase the progression of the characters/ universe	Showcase the main gameplay		Challenging	Humorous/funny	Adrenaline-pumping

SOUTH KOREA

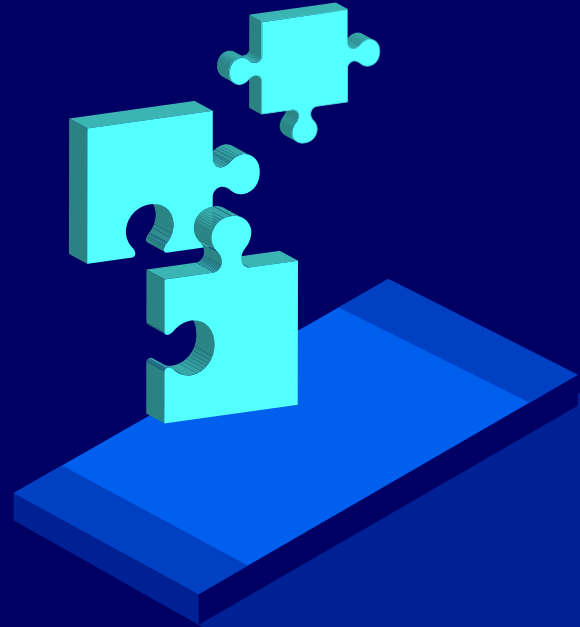| 37%	38%	50%		42%	42%	31%
Showcase the control mechanics	Showcase the progression of your characters/ universe	Showcase the main gameplay		Challenging	Adrenaline-pumping	Proud/inspiring

Source: "Mobile Gaming Genre Study" by Interpret (Facebook IQ-commissioned online survey of 13,412 mobile games ages 18+ across AU, BR, CA, DE, FR, ID, IN, JP, KR, UK, US, Nov–Dec 2019)

JAPAN

Turn-Based RPG

36%	62%	78%		48%	44%	33%
Showcase the game's art styles	Showcase the main gameplay	Showcase the characters/story		Humorous/funny	Adrenaline-pumping	Relaxing/tranquil

Puzzle RPG

28%	59%	61%		57%	42%	35%
Showcase the game's art styles	Showcase the main gameplay	Showcase the characters/story		Humorous/funny	Adrenaline-pumping	Relaxing/tranquil

Action RPG/ MMORPG

35%	60%	67%		50%	47%	32%
Showcase the game's art styles	Showcase the main gameplay	Showcase the characters/story		Adrenaline-pumping	Humorous/funny	Relaxing/tranquil

EXAMPLE: NETMARBLE KNIGHTS CHRONICLE

This ad for Netmarble's Knights Chronicle combines the main character and game's art style together in quick but impactful motion ad, creating a strong call to action.

KNIGHTS CHRONICLE

Word Spell Witch
Cynthia!

Bringing back lapsed players

Implementing an effective ad strategy can not only attract new RPG players, but also bring back lapsed players. Over 90% of RPG players in the US and about 8 in 10 RPG players in Japan say they would be open to going back to playing a RPG game that they haven't played in the last 30 days.

Communicating new content or updates is the best way to re-engage these players, with 47% of US RPG players saying that this would help motivate them to go back to a game. Interestingly, positive press can also help re-engage RPG players in Japan with about 1 in 5 saying they'd considering re-trying a game they haven't played recently if they'd see news articles or posts about the game.

WHAT COULD INFLUENCE RPG PLAYERS TO RETURN OR RE-DOWNLOAD A GAME THEY HAVEN'T PLAYED IN 30 DAYS

US

47%
Hearing about new content or available updates

32%
Hearing about a reward for coming back

31%
Someone online inviting them to play the game with them

UK

37%
Hearing about new content or available updates

34%
Hearing about a reward for coming back

26%
Someone bringing up the game during an in-person conversation

SOUTH KOREA

46%
Hearing about new content or available updates

42%
Hearing about a reward for coming back

25%
Someone online inviting them to play the game with them

JAPAN

Turn-Based RPG

46%
Hearing about new content or available updates

20%
Seeing news articles or blog posts about the game

19%
Someone bringing up the game during an in-person conversation

Puzzle RPG

34%
Hearing about new content or available updates

20%
Someone bringing up the game during an in-person conversation

18%
Seeing news articles or blog posts about the game

Action RPG/ MMORPG

40%
Hearing about new content or available updates

22%
Seeing news articles or blog posts about the game

21%
Someone bringing up the game during an in-person conversation

03
Puzzle

Puzzle executive summary

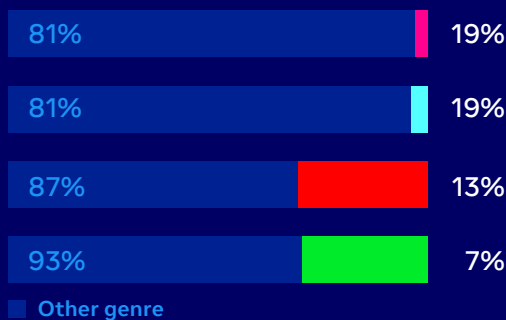|	INSIGHT	TAKEAWAY
1 GENRE FULFILLMENT	Puzzle players primarily enjoy mobile games for functional reasons like passing time and relieving stress. However, they also find gaming appealing to learn and immerse themselves into different worlds.	To prevent boredom, Puzzle developers can consider features like recurring live events, special live event currency and having 6+ level goal types.
2 COMMUNITY	People report playing Puzzle games to enjoy time to themsevles and are less interested in social engagement. However they show interest in community-oriented activities both during and outside of gameplay.	With more community mechanics beginning to appear in Puzzle games, explore features like co-op tasks, competitive ladder systems and guild mechanics.
3 MONETIZATION	Puzzle players are less likely to make in in-app purchase than core genre players, preferring free-to-play models enabled through in-app ads. While the majority of players embrace ads, they appreciate incentives for watching them.	Ensure advertising is built into the game infrastructure at the beginning. To encourage in-app purchases, consider features like piggy bank systems, limited-time in-app purchase bundles and having 6+ boosts to purchase.
4 AD PREFERENCES	Humorous ads that allow players to interact with the game controls directly in the ad often resonate with Puzzle players.	Consider formats like playable ads to allow Puzzle players to try out the game as soon as they discover it.

State of Puzzle games

Puzzle is the most popular genre in the US and UK with over 60% of mobile gamers playing this genre in these regions. Mobile game players in the Asia Pacific region also gravitate toward this genre; just under half of players in South Korea play Puzzle games, and it is the second most common genre in Japan behind RPG.

Matching Puzzle is the most common type of mobile Puzzle game that people play across each of the four markets. In the US and UK, nearly half of mobile gamers play Matching Puzzle and about one-third of players in South Korea and Japan enjoy this sub-genre. For more insights on RPG Puzzle games, refer to the RPG section of this report.

PUZZLE MOBILE GAMING PLAYERSHIP[1]
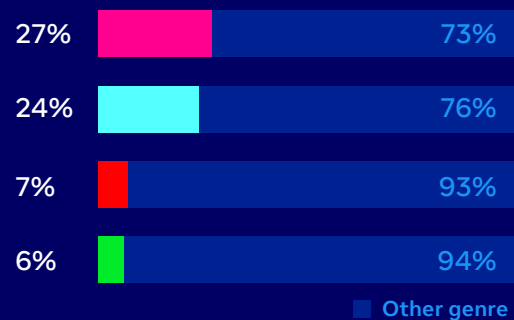
SOUTH KOREA
45%

UK
63%

JAPAN
38%

US
63%

SHARE OF DOWNLOADS BY COUNTRY[2]

81%	US	19%
81%	UK	19%
87%	JAPAN	13%
93%	SOUTH KOREA	7%

■ Other genre

SHARE OF REVENUE BY COUNTRY[2]

27%	US	73%
24%	UK	76%
7%	JAPAN	93%
6%	SOUTH KOREA	94%

■ Other genre

Who are Puzzle players?

Puzzle players are more likely to be female and over the age of 35. They see gaming as one of the many things they do rather than it being core to their identity. Since they typically enjoy mobile games in between doing other things, they prefer games that can be played in short increments rather than in longer, more involved sessions. They're also more likely to play on their own rather than with others.

■ US **■ UK**

GENDER

US	UK
Nearly three-quarters of Matching Puzzle & Word/Brain/Board and 64% of Physics Puzzle players are female	74% of Matching Puzzle & Word/Brain/Board and 54% of Physics Puzzle players are female

AGE RANGE

US	UK
More than 6 in 10 Matching Puzzle & Word/Brain/Board and 54% of Physics Puzzle players are 35 or older	About 6 in 10 are 35 or older

AVERAGE NUMBER OF GAMES PLAYED

US	UK
3.2	3

PLAY SESSION PREFERENCES

US	UK
Over two-thirds say they prefer games that are designed to be played in short sessions	Over 7 in 10 say they prefer games that are designed to be played in short sessions

WHY THEY PLAY MOBILE GAMES

US	UK
Their top reasons for playing mobile games are to relieve stress and spend time	Their top reasons for playing mobile games are to relieve stress and spend time

SOCIAL INTERACTION PREFERENCES

US	UK
Around 80% say mobile gaming is a way to enjoy time with themselves	Around 80% say mobile gaming is a way to enjoy time with themselves

Who are Puzzle players?

GENDER

66% are female

73% are female

AGE RANGE

71% are 35 or older

64% are 35 or older

AVERAGE NUMBER OF GAMES PLAYED

2.4

2.4

PLAY SESSION PREFERENCES

71% say they prefer games that are designed to be played in short sessions

74% say they prefer games that are designed to be played in short sessions

WHY THEY PLAY MOBILE GAMES

Their top reasons for playing mobile games are to relieve stress and spend time

Their top reasons for playing mobile games are to relieve stress and spend time

77% say gaming is just one of the things they do rather than being a key part of their identities

1.3x more likely to prefer games with stylized art designs compared to total South Korean mobile players.

SOCIAL INTERACTION PREFERENCES

86% say mobile gaming is a valuable way to enjoy time to themselves

85% say mobile gaming is a way to enjoy time with themselves

Genre fulfillment

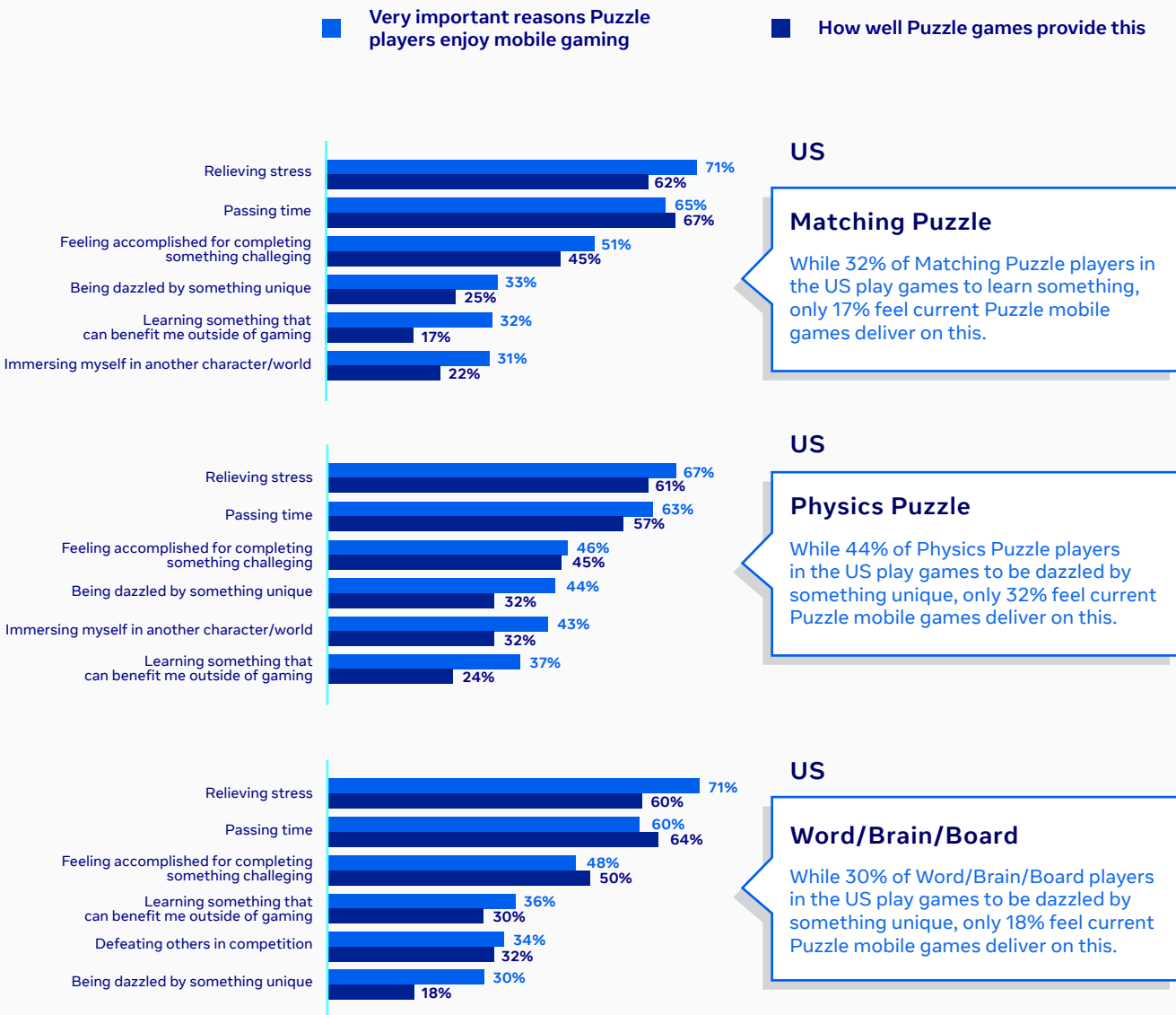**Understand player motivations and how to deliver on them**

Why people play

In general, Puzzle players predominantly enjoy playing mobile games to relieve stress, pass time and feel accomplished for completing something challenging. Puzzle players feel that this genre often delivers on those needs, especially in passing time between daily activities and feeling accomplished.

However, Puzzle players are motivated to play mobile games for several other reasons that this genre is currently not addressing well.

In the US and UK, Puzzle players enjoy being dazzled by something unique as well as learning something that can benefit them outside of gaming. These are particularly important to Physics Puzzle players. While many cite these as very appealing reasons for mobile gaming, less say that the current Puzzle games they play deliver these benefits very well.

■ **Very important reasons Puzzle players enjoy mobile gaming**

■ **How well Puzzle games provide this**

US

Relieving stress	71% / 62%
Passing time	65% / 67%
Feeling accomplished for completing something challeging	51% / 45%
Being dazzled by something unique	33% / 25%
Learning something that can benefit me outside of gaming	32% / 17%
Immersing myself in another character/world	31% / 22%

Matching Puzzle

While 32% of Matching Puzzle players in the US play games to learn something, only 17% feel current Puzzle mobile games deliver on this.

US

Relieving stress	67% / 61%
Passing time	63% / 57%
Feeling accomplished for completing something challeging	46% / 45%
Being dazzled by something unique	44% / 32%
Immersing myself in another character/world	43% / 32%
Learning something that can benefit me outside of gaming	37% / 24%

Physics Puzzle

While 44% of Physics Puzzle players in the US play games to be dazzled by something unique, only 32% feel current Puzzle mobile games deliver on this.

US

Relieving stress	71% / 60%
Passing time	60% / 64%
Feeling accomplished for completing something challeging	48% / 50%
Learning something that can benefit me outside of gaming	36% / 30%
Defeating others in competition	34% / 32%
Being dazzled by something unique	30% / 18%

Word/Brain/Board

While 30% of Word/Brain/Board players in the US play games to be dazzled by something unique, only 18% feel current Puzzle mobile games deliver on this.

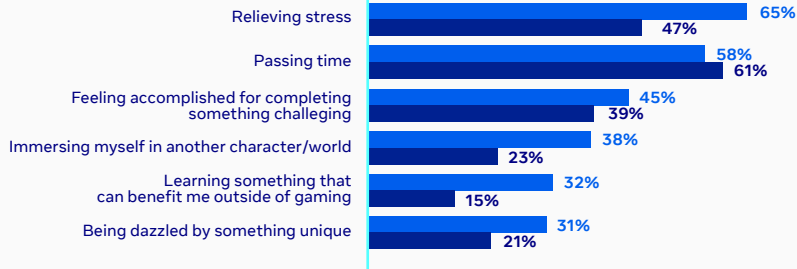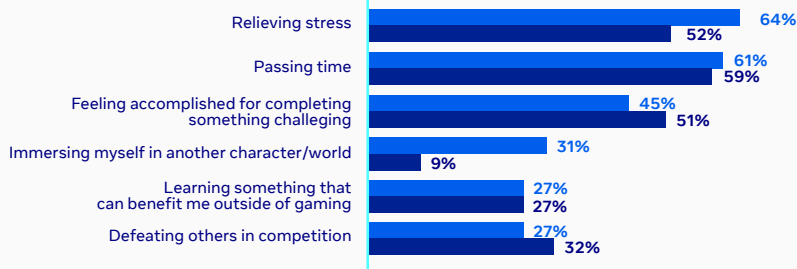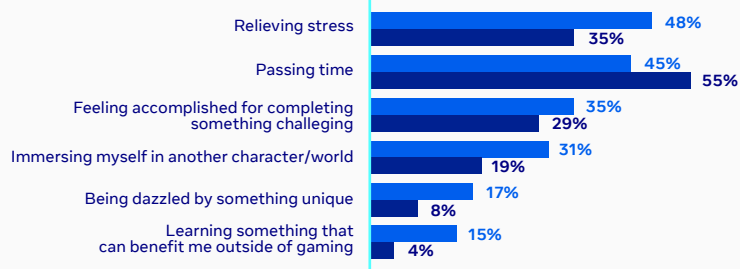**■ Very important reasons Puzzle players enjoy mobile gaming**

■ How well Puzzle games provide this

UK

Matching Puzzle

While 27% of Matching Puzzle players in the UK play games to learn something, only 12% feel current Puzzle mobile games deliver on this.

Reason	Very important	How well provided
Relieving stress	62%	52%
Passing time	57%	65%
Feeling accomplished for completing something challenging	44%	39%
Immersing myself in another character/world	27%	13%
Learning something that can benefit me outside of gaming	27%	12%
Defeating other people in competition	26%	18%

UK

Physics Puzzle

While 38% of Physics Puzzle players in the UK play games to immerse themselves into another character or world, only 23% feel current Puzzle mobile games deliver on this.

Reason	Very important	How well provided
Relieving stress	65%	47%
Passing time	58%	61%
Feeling accomplished for completing something challenging	45%	39%
Immersing myself in another character/world	38%	23%
Learning something that can benefit me outside of gaming	32%	15%
Being dazzled by something unique	31%	21%

UK

Word/Brain/Board

While 31% of Word/Brain/Board players in the UK play games to immerse themselves into another character or world, only 9% feel current Puzzle mobile games deliver on this.

Reason	Very important	How well provided
Relieving stress	64%	52%
Passing time	61%	59%
Feeling accomplished for completing something challenging	45%	51%
Immersing myself in another character/world	31%	9%
Learning something that can benefit me outside of gaming	27%	27%
Defeating others in competition	27%	32%

JAPAN

Matching Puzzle

While 48% of Matching Puzzle players in Japan play games to relieve stress, only 35% feel current Puzzle mobile games deliver on this.

Reason	Very important	How well provided
Relieving stress	48%	35%
Passing time	45%	55%
Feeling accomplished for completing something challenging	35%	29%
Immersing myself in another character/world	31%	19%
Being dazzled by something unique	17%	8%
Learning something that can benefit me outside of gaming	15%	4%

SOUTH KOREA

Matching Puzzle

While 57% of Matching Puzzle players in South Korea play games to relieve stress, only 40% feel current Puzzle mobile games deliver on this.

Reason	Very important	How well provided
Relieving stress	57%	40%
Passing time	34%	44%
Feeling accomplished for completing something challenging	29%	33%
Being dazzled by something unique	27%	13%
Defeating others in competition	21%	20%
Connecting me to something I am passionate about outside of gaming	16%	8%

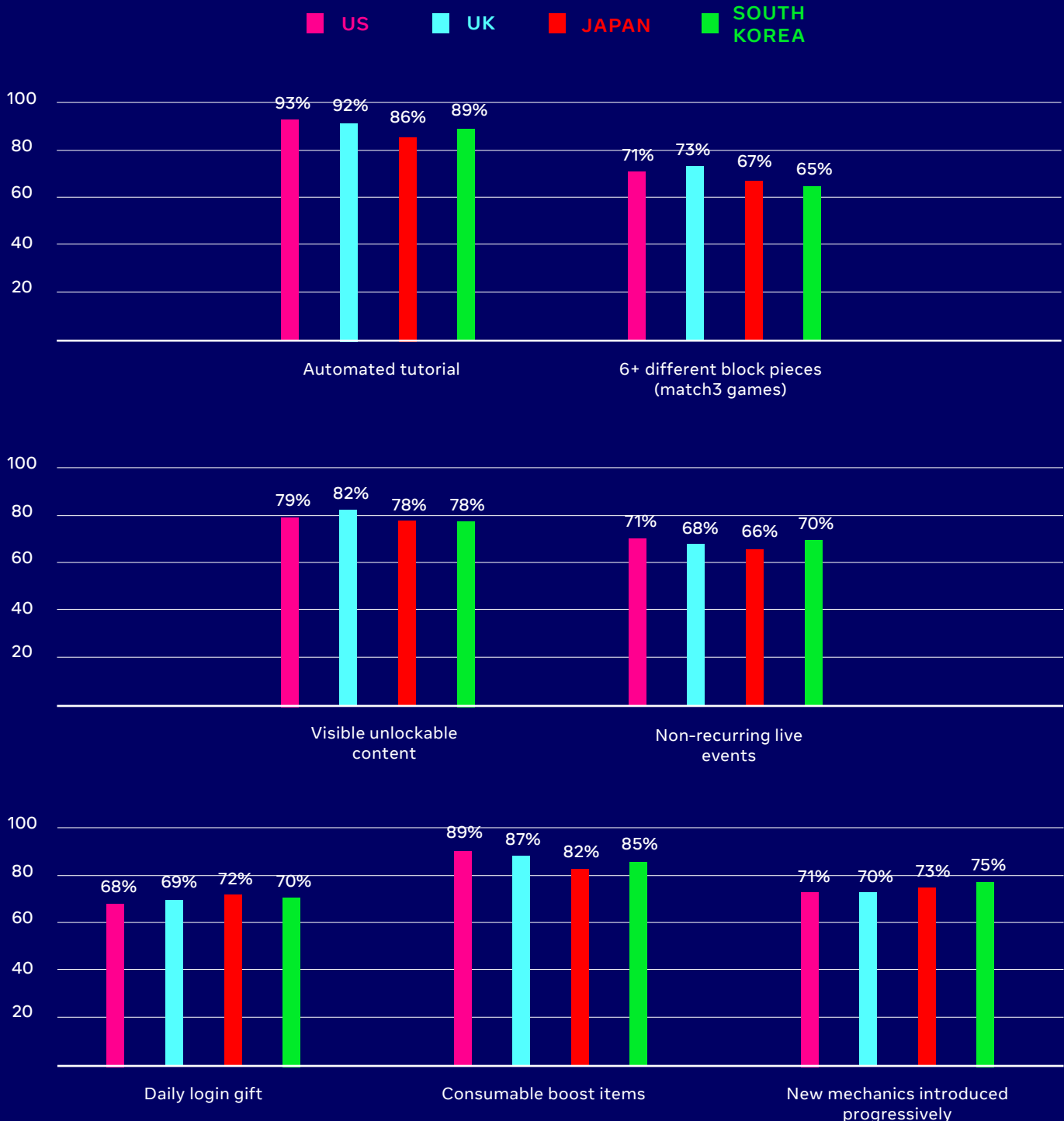Source: "Mobile Gaming Genre Study" by Interpret (Facebook IQ-commissioned online survey of 13,412 mobile games ages 18+ across AU, BR, CA, DE, FR, ID, IN, JP, KR, UK, US, Nov–Dec 2019)

Why people stray

As with other genres, lack of fulfillment can lead to churn. Most Puzzle players cite boredom, repetitiveness and lack of progress as the main reasons why they've abandon Puzzle games. Ad breaks that are too frequent or long can also detract from the game experience. Over 1 in 4 Japanese Matching Puzzle players also say difficulty has made them leave a game in this genre.

Puzzle players generally stick to playing other Puzzle games, but they also migrate toward the Hyper-Casual genre as well. Interestingly, they are starting to tap into more midcore titles as well, having recently downloaded Action games in the US, Japan and South Korea.

■ Top reasons why Puzzle players stop playing Puzzle games[1]

■ Top genres installed by Puzzle mobile gamers[2]*

US

Matching Puzzle

47%
I get bored with the game

32%
I'm not making any progress or progress is too slow

24%
Ads that are too frequent

- o Puzzle
- o Hyper-Casual
- o Action

Physics Puzzle

43%
I get bored with the game

32%
Ads that are too frequent

25%
The game is too repetitive

Word/Brain/Board

47%
I get bored with the game

33%
Ads that are too frequent

26%
Ads that are too long

SOUTH KOREA

Matching Puzzle

42%
I get bored with the game

33%
The game is too repetitive

22%
I'm not making any progress or progress is too slow

- o Hyper-Casual
- o Puzzle
- o Action

UK

Matching Puzzle

48%
I get bored with the game

25%
I'm not making any progress, or progress is too slow

24%
Ads that are too frequent

- o **Puzzle**
- o **Hyper-Casual**
- o **Simulation**

Physics Puzzle

40%
I get bored with the game

28%
The game is too repetitive

28%
Ads that are too long

Word/Brain/Board

40%
I get bored with the game

40%
Ads that are too frequent

30%
Ads that are too long

JAPAN

Matching Puzzle

57%
I get bored with the game

27%
Game is too difficult

25%
I'm not making any progress or progress is too slow

- o **Puzzle**
- o **Hyper-Casual**
- o **Action**

Feature insights: Genre fulfillment

Puzzle games are often straightforward and once the core mechanics are understood, playing might get repetitive if there is not enough regular variety. Fortunately there are several features developers can use to prevent boredom.

BASIC FEATURES (COMMON ACROSS ALL PUZZLE GAMES)

There are several basic features most Puzzle games use to keep players engaged throughout hours of gameplay. Automated tutorials and visible unlockable content help beginner players understand the game and illustrate that as they continue playing, the game will change and new mechanics will be introduced. Daily login gifts and consumable boosters help maintain retention, whilst live events are a great way of introducing new worlds, playing modes and other content to support the basic gameplay experience.

Legend: US — UK — JAPAN — SOUTH KOREA

Automated tutorial: US 93%, UK 92%, Japan 86%, South Korea 89%

6+ different block pieces (match3 games): US 71%, UK 73%, Japan 67%, South Korea 65%

Visible unlockable content: US 79%, UK 82%, Japan 78%, South Korea 78%

Non-recurring live events: US 71%, UK 68%, Japan 66%, South Korea 70%

Daily login gift: US 68%, UK 69%, Japan 72%, South Korea 70%

Consumable boost items: US 89%, UK 87%, Japan 82%, South Korea 85%

New mechanics introduced progressively: US 71%, UK 70%, Japan 73%, South Korea 75%

KEY FEATURES
(TOP PUZZLE GAMES WIN WITH THESE)

Almost all top Puzzle games use a wide variety of different recurring events to make sure there's something exciting going on all the time. The amount of these events has grown steadily and nowadays it's common to see two or even three events running at the same time when you log in. Special event currency is also gaining ground, as almost half of all top Puzzle games use it together with live event related decorative item shops. Another interesting differentiator between the top grossing Puzzle games and others is the amount of level goal types they use; the best performers have more variety in levels which helps to keep things fresh.

According to data, the following three key features are especially good success drivers, as they are utilized much more by the best performing Puzzle titles compared to the rest.

■ Top 20%* utilization   ■ Overall utilization

60%

91%

**RECURRING LIVE
EVENTS**

21%

44%

**SPECIAL LIVE
EVENT CURRENCY**

28%

64%

**6 OR MORE LEVEL GOAL
TYPES (MATCH3)**
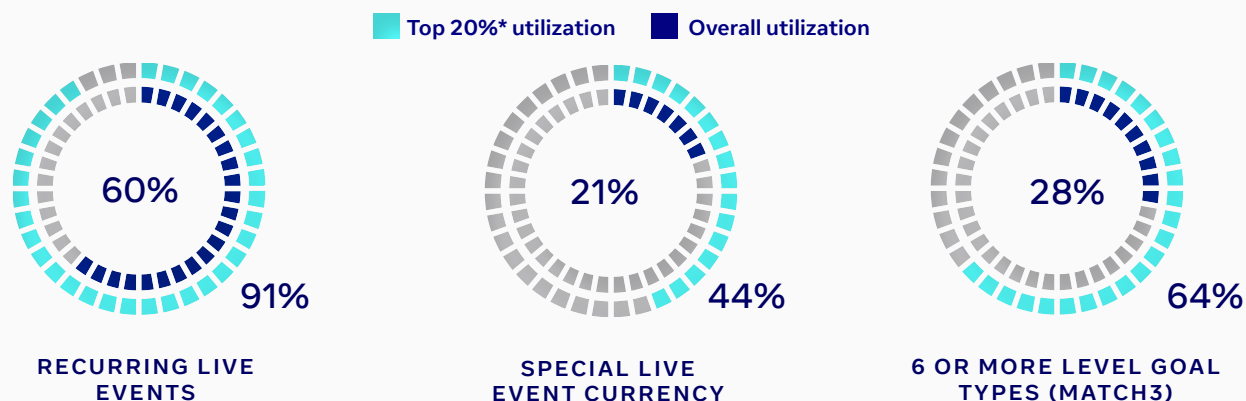
Source: GameRefinery data based on statistical sampling of iOS top grossing
10,000 games in US, UK, Japan and South Korea, Q1 2020

*Top grossing fifth of all Puzzle games in US, KR, JP, UK

FISHDOM – LUCKY HORSESHOE

RECURRING LIVE EVENTS

Recurring live events are limited-time instances that come back regularly (e.g. every other weekend). They are, in other words, a permanent part of the game even if one instance only lasts for a short time.

The most common recurring live events in Puzzle games are competitive tournaments, streak events or collaborational tasks with random players or friends.
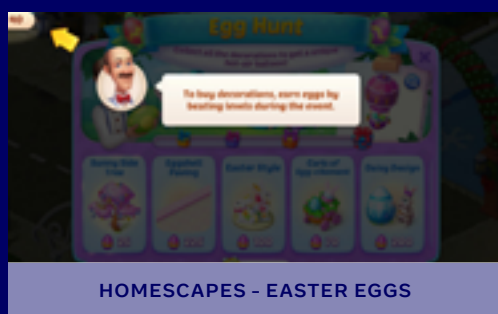
HOMESCAPES – EASTER EGGS

SPECIAL LIVE EVENT CURRENCY

A growing number of top Puzzle games have started using special event currency acquirable through participating in various event activities (e.g. completing event levels).

In Puzzle games, event currency is usually needed to acquire various event-related "vanity items", such as portrait frames, decorative buildings or other things that reflect player progress and accomplishments in the game.

WILDSCAPES

6 OR MORE LEVEL GOAL TYPES (MATCH3)

Having enough different level archetypes for players to experience, master and enjoy is a great way to increase your game's lifespan.

By frequently introducing whole new level type designs and level goals decreases the sense of repetitiveness and helps to keep both mid and long-term retentions at healthy levels. Moreover, early retention is also boosted if enough new level goal types are introduced early on.
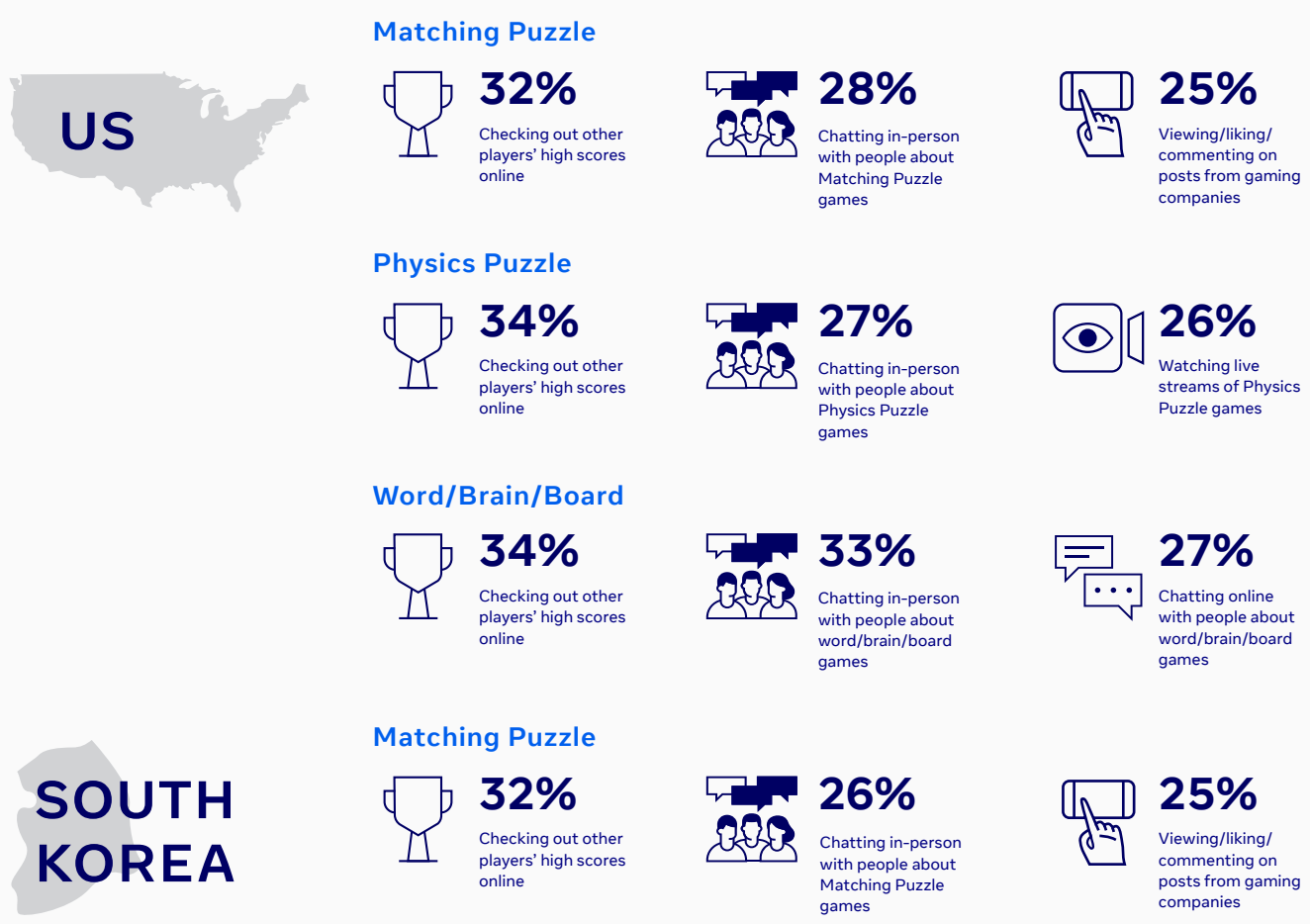
Community in Puzzle games

Puzzle players enjoy playing solo and social engagement is less important to them, compared to players of other genres like RPG and Strategy. In fact, 86% of Japanese Puzzle players say mobile gaming is a valuable way to enjoy time to themselves. However, there's appetite for more social activity with over 6 in 10 players in the US expressing interest in participating in community-oriented activities related to the genre in the future. Those activities include communicating with gaming companies and other players online about Puzzle games as well as checking out other players' high scores on a leaderboard. Interestingly, more than 1 in 4 Physics Puzzle players in the US are also keen to watch live streams of the sub-genre being played online.

Puzzle players are also less likely to participate in online gaming communities compared to players in midcore genres; less than a quarter of Matching Puzzle players in the US, UK and South Korea engage with an online gaming group weekly. It's worth noting though that Physics Puzzle players in the US and UK are more likely to participate in these communities than Matching Puzzle and Word/Brain/Board players.

For those who do participate in online gaming communities, there are some interesting nuances by geography. In the US, Puzzle players typically leverage online groups to keep up to date on game updates whereas UK Puzzle players use them to find ways to improve at games.

SOCIAL/COMMUNITY ACTIVITIES THAT PUZZLE PLAYERS WOULD BE OPEN TO DOING IN THE FUTURE

US

Matching Puzzle

32%
Checking out other players' high scores online

28%
Chatting in-person with people about Matching Puzzle games

25%
Viewing/liking/commenting on posts from gaming companies

Physics Puzzle

34%
Checking out other players' high scores online

27%
Chatting in-person with people about Physics Puzzle games

26%
Watching live streams of Physics Puzzle games

Word/Brain/Board

34%
Checking out other players' high scores online

33%
Chatting in-person with people about word/brain/board games

27%
Chatting online with people about word/brain/board games

SOUTH KOREA

Matching Puzzle

32%
Checking out other players' high scores online

26%
Chatting in-person with people about Matching Puzzle games

25%
Viewing/liking/commenting on posts from gaming companies

Source: "Mobile Gaming Genre Study" by Interpret (Facebook IQ-commissioned online survey of 13,412 mobile games ages 18+ across AU, BR, CA, DE, FR, ID, IN, JP, KR, UK, US, Nov–Dec 2019)
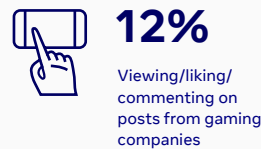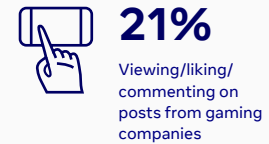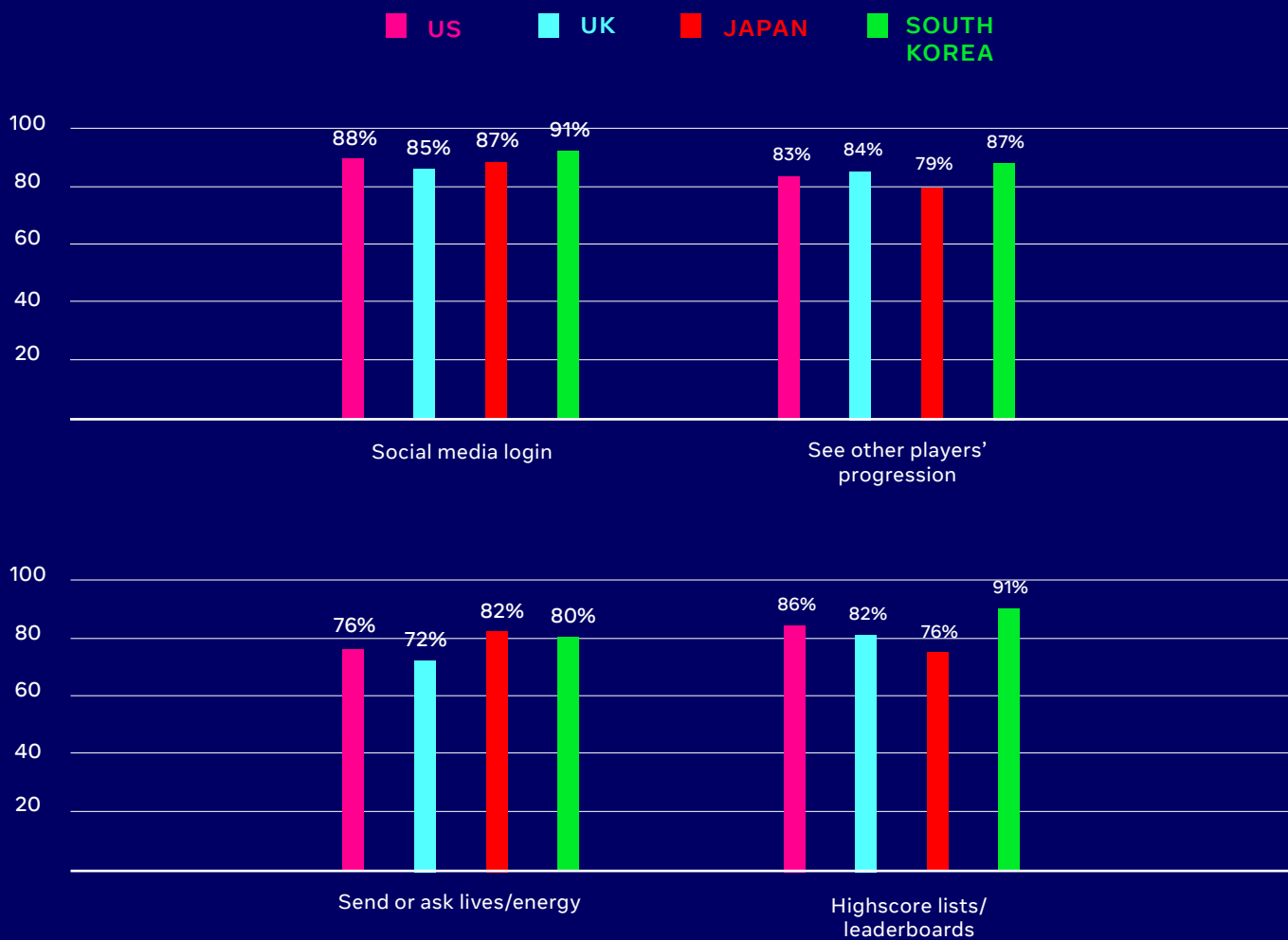
UK

Matching Puzzle

30% Chatting in-person with people about Matching Puzzle games

29% Checking out other players' high scores online

21% Viewing/liking/commenting on posts from gaming companies

Physics Puzzle

32% Chatting in-person with people about Physics Puzzle games

30% Checking out other players' high scores online

28% Viewing/liking/commenting on posts from gaming companies

Word/Brain/Board

35% Chatting in-person with people about word/brain/board games

32% Checking out other players' high scores online

21% Viewing/liking/commenting on posts from gaming companies

JAPAN

19% Checking out other players' high scores online

12% Viewing/liking/commenting on posts from gaming companies

11% Viewing/liking/commenting on posts from people you don't know

Puzzle developers have the power to build and enhance communities by providing the right content. And Puzzle players are keen to hear from game developers with about 8 in 10 players in the US and UK saying they'd be open to some type of messaging from brands in this genre.

Across markets, tips and tricks as well as information on upcoming in-game events are particularly of interest for Puzzle players. Puzzle players are also interested in support from developers with Q&As as well as customer service being types of information they'd like to have.

INFORMATION PUZZLE PLAYERS WANT TO RECEIVE FROM MOBILE GAMES/DEVELOPERS

JAPAN

Matching Puzzle	44%	30%	28%	15%	13%
	Tips, tricks and strategies	Upcoming in-game events	Upcoming updates or game content releases	Customer service/product support	Questions & answers

SOUTH KOREA

Matching Puzzle	46%	43%	37%	30%	29%
	Tips, tricks and strategies	Upcoming in-game events	Upcoming updates or game content releases	Being able to influence or provide feedback on games	Questions and answers

US

Matching Puzzle

59%	37%	36%	27%	24%
Tips, tricks and strategies	Questions & answers	Upcoming updates or game content releases	Upcoming in-game events	Customer service/ product support

Physics Puzzle

58%	41%	37%	28%	27%
Tips, tricks and strategies	Questions & answers	Upcoming updates or game content releases	Being able to influence or provide feedback on games	Upcoming sales or promotions

Word/Brain/ Board

62%	37%	33%	27%	26%
Tips, tricks and strategies	Questions & answers	Upcoming updates or game content releases	Customer service/product support	Upcoming in-game events

UK

Matching Puzzle

58%	35%	32%	30%	24%
Tips, tricks and strategies	Questions & answers	Upcoming updates or game content releases	Upcoming in-game events	Customer service/ product support

Physics Puzzle

56%	34%	33%	25%	23%
Tips, tricks and strategies	Upcoming updates or game content releases	Questions & answers	Upcoming in-game events	Customer service/ product support

Word/Brain/ Board

60%	41%	33%	30%	27%
Tips, tricks and strategies	Questions & answers	Upcoming updates or game content releases	Upcoming in-game events	Customer service/ product support

Feature insights: Community

Among Puzzle games, social features haven't been as integral part of the gaming experience as in RPG and Strategy games. However, there's a clear shift taking place in this regard, as a growing number community mechanics have started appearing in top performing Puzzle games.

BASIC FEATURES
(COMMON ACROSS ALL PUZZLE GAMES)

In general, Puzzle games are using community features rather lightly and keep them on a relatively high level. Linking your account with Facebook or other social media platforms to see friends' progression, sending lives / energy to other players and comparing scores against the best in highscore lists are some of the basic features most Puzzle games use to increase social interaction.

■ **US**　　■ **UK**　　■ **JAPAN**　　■ **SOUTH KOREA**

Social media login
- US: 88%
- UK: 85%
- JAPAN: 87%
- SOUTH KOREA: 91%

See other players' progression
- US: 83%
- UK: 84%
- JAPAN: 79%
- SOUTH KOREA: 87%

Send or ask lives/energy
- US: 76%
- UK: 72%
- JAPAN: 82%
- SOUTH KOREA: 80%

Highscore lists/ leaderboards
- US: 86%
- UK: 82%
- JAPAN: 76%
- SOUTH KOREA: 91%

KEY FEATURES
(TOP PUZZLE GAMES WIN WITH THESE)

When focusing on the differentiating community features, it's clear that features that enable deeper social interaction and increase sense of "togetherness" set the top grossing Puzzle games apart from the others. Guilds are usually seen as something only Strategy or RPG games use, but Puzzle games can benefit from them as well, especially when combined with co-op tasks and competitive ladder systems for added depth.

According to data, the following three key features are especially good success drivers, as they are utilized much more by the best performing Puzzle titles compared to the rest.

▇ Top 20%* utilization   ▇ Overall utilization

13%   **39%**

CO-OP TASKS

36%   **60%**

COMPETITIVE LADDER SYSTEM

12%   **37%**

GUILD MECHANICS
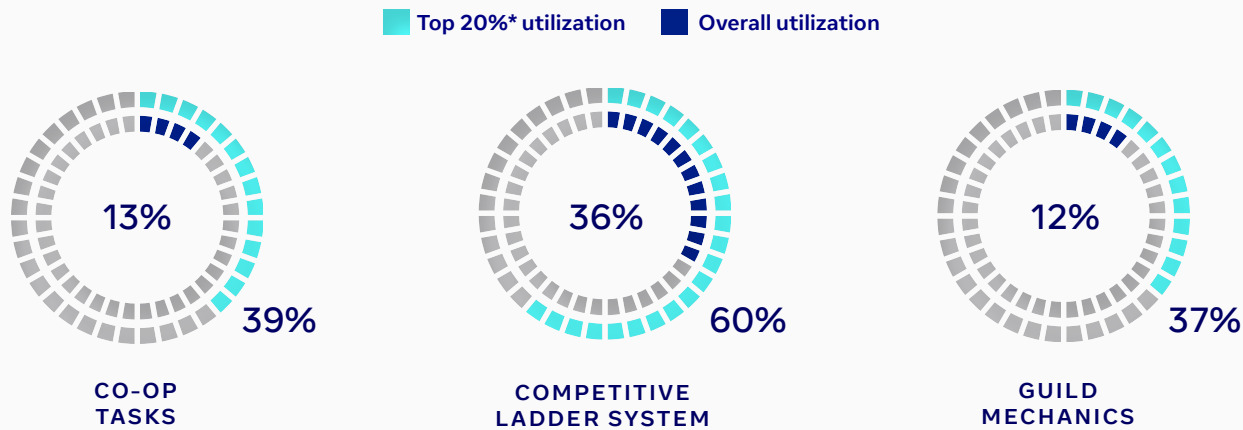
Source: GameRefinery data based on statistical sampling of iOS top grossing 10,000 games in US, UK, Japan and South Korea, Q1 2020

*Top grossing fifth of all Puzzle games in US, KR, JP, UK
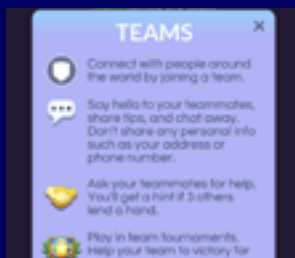
WORDSCAPES - TEAMS

GUILD MECHANICS

This popular midcore feature has recently started to appear in top Puzzle games, which is unsurprising given the megatrend of social features isn't showing any sign of weakness.

Guild mechanics are powerful by themselves, but they also form an excellent foundation for other communal features such as co-ops, live events and competitive ladder systems.

GARDENSCAPES - LEAGUES

COMPETITIVE LADDER SYSTEM

Even though the majority of Puzzle games are not multiplayer games and focus more on solo achievements, competitive ladder systems are increasingly popular, especially among the top Puzzle games.

The key is to keep the ladders casual enough for all players to enjoy, while still instilling some competitiveness to increase the thrill and excitement of beating others.

HOMESCAPES - TEAM CHEST

CO-OP TASKS

Co-operational tasks are a proven way to bring players together and enhance the social aspects of any game. Even in casual games that don't usually boast deep communal mechanics, co-op playing can help retention and engagement.

In Puzzle games co-op tasks are usually something to be completed either with your friends or random acquaintances, but guild-related co-ops have also started to surface in growing numbers.

Monetization

Create a monetization strategy and incorporate relevant features

In-app purchases and in-app ads

Across all four markets, about 6 to 7 percent of Puzzle players make in-app purchases (IAP).

When it comes to in-app purchases, Puzzle players are more likely to prefer making a purchase directly as opposed to making purchases with a random element (e.g. loot boxes) with around 6 in 10 players in the US and Japan expressing this. One noteworthy geographical difference for in-app purchases is on openness to pay-to-win options. In the US, UK and Japan, most Puzzle players are okay with pay-to-win options. However, 52% of South Korean Puzzle players say that in-app purchases should be limited to items that cannot help you win.

% OF PLAYERS WHO MAKE AN IN-APP PURCHASE IN A MONTH[1]

5.7% UK

7.4% JAPAN

6.2% US
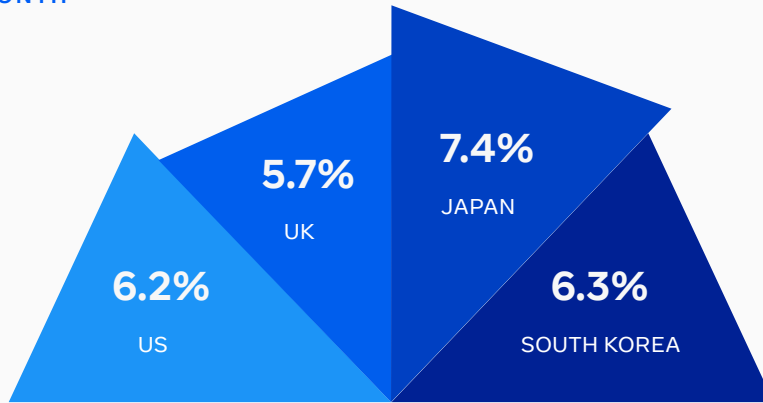
6.3% SOUTH KOREA

IN-APP AD LENGTH & FREQUENCY PREFERENCES AMONG PUZZLE PLAYERS[2]

Over the course of 10 minutes playing a game app, I would prefer to see…	US			UK			SOUTH KOREA	JAPAN
	MATCHING PUZZLE	PHYSICS PUZZLE	WORD/ BRAIN/ BOARD	MATCHING PUZZLE	PHYSICS PUZZLE	WORD/ BRAIN/ BOARD	MATCHING PUZZLE	MATCHING PUZZLE
ONE 30 SECOND AD	55%	43%	56%	56%	54%	52%	43%	49%
TWO 15 SECOND ADS	17%	16%	17%	15%	16%	22%	14%	21%
THREE 10 SECOND ADS	14%	26%	16%	15%	19%	16%	19%	18%
SIX 5 SECOND ADS	14%	16%	11%	15%	12%	11%	23%	12%

Since so few Puzzle players make in-app purchases, in-app ads are a valuable way for developers to monetize games within this genre. Puzzle players understand the value exchange of ads with 8 in 10 of US players and 96% of Japanese players saying they are okay with seeing in-app ads.[1]

% OF PUZZLE MOBILE PLAYERS WHO ARE OPEN TO IN-APP ADS
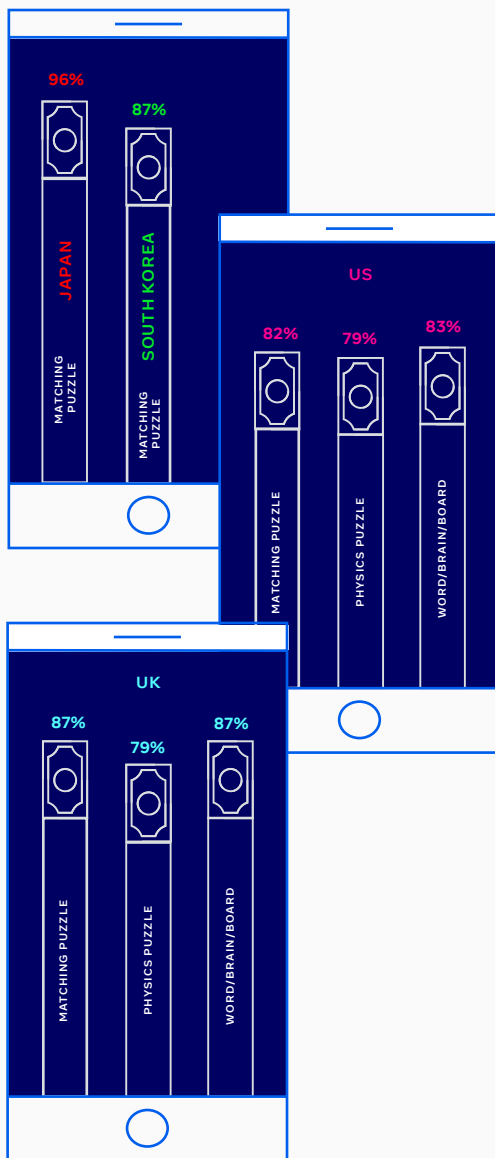
The number of mobile games with an ad SDK is on the rise according to App Annie, who reported that 89% of the top downloaded games of 2019 had an ad SDK.

Looking at Puzzle games specifically, those with ad SDKs averaged a 66% increase in total minutes one month after install, with a 133% increase during the three-month, post-install period. Meanwhile total sessions climbed 81% and 109% in the respective time periods.[2]

For more information on incorporating ads into games, read the full App Annie report on Facebook Audience Network.

PUZZLE GAMES AVG. TOTAL HOURS POST FIRST ADVERTISING PLATFORM SDK INSTALLATION[2]
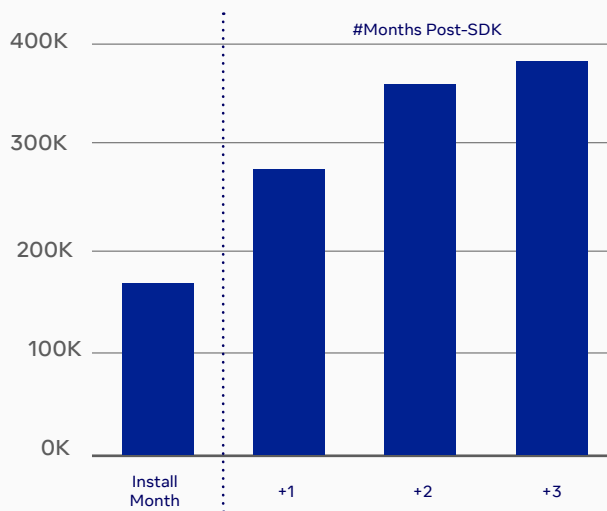
Among all Games worldwide within Puzzle genre from Jan-Dec 2019 with >0.02% user penetration which had its first ad SDK installed between Mar - Oct 2019 and App Annie detected ad monetization. Install Month refers to month in which an ad SDK was first installed

However, it's important to take into account player preferences for viewing in-app ads to provide value to the experience.

Generally, Puzzle players prefer longer, less frequent ad breaks compared to shorter, more frequent ones. Over the course of 10 minutes of gameplay, more than half of Puzzle players in the UK and 49% of Japanese players said they would like to see one 30 second ad as opposed to shorter ad units with more frequent breaks.
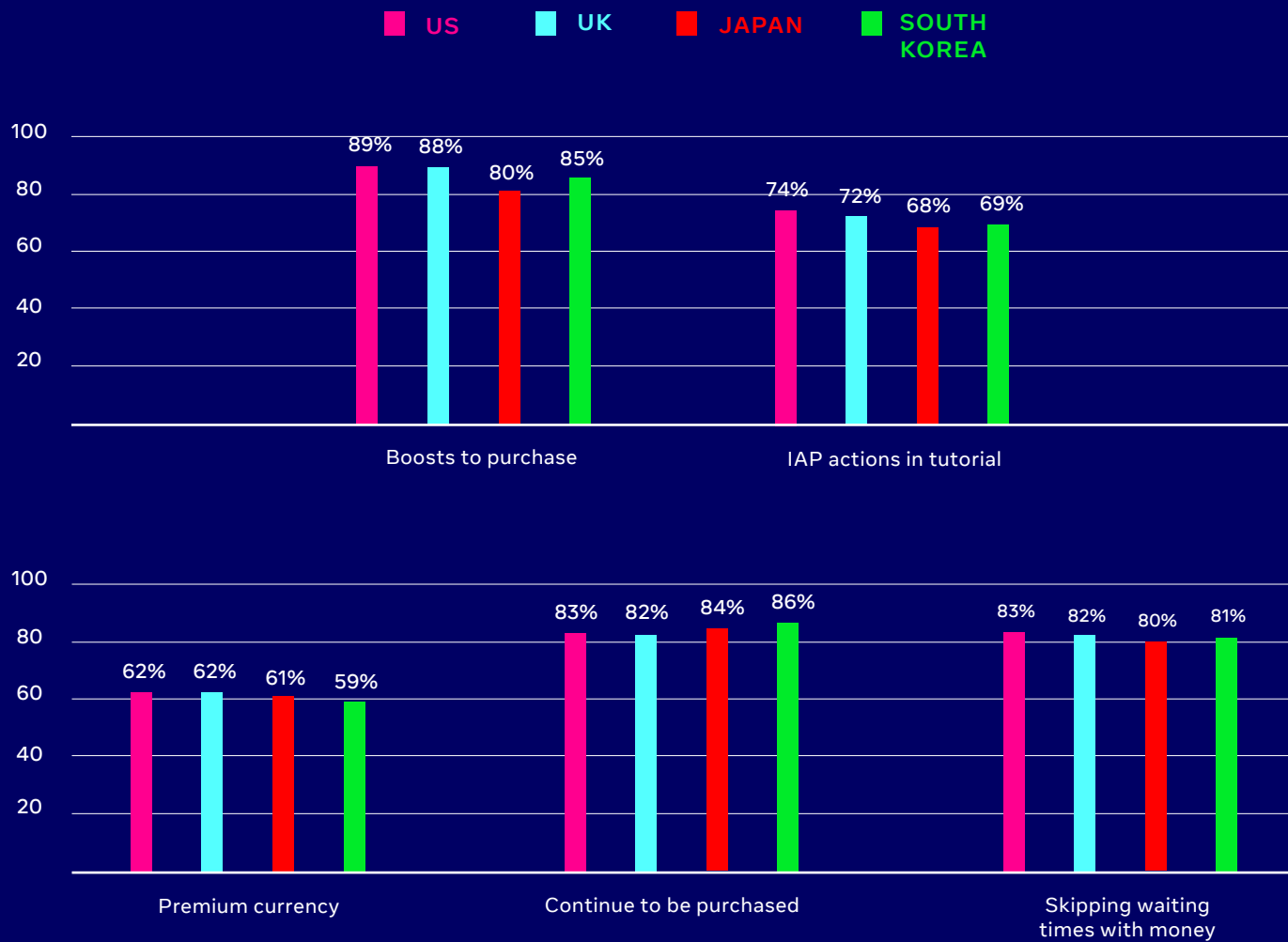
Incentivizing players to watch in-app ads can also be beneficial; 59% of South Korean Matching Puzzle players say they prefer watching in-app ads when they receive a reward[1].

Feature insights:
Monetization (in-app purchases)

Puzzle game monetization has traditionally been straightforward and focused on core gameplay. Even though a growing number of titles have implemented some meta elements, monetization is still heavily focused on the core game across the entire Puzzle genre.

BASIC FEATURES
(COMMON ACROSS ALL PUZZLE GAMES)

As stated, Puzzle games mostly focus solely on core game with little or no focus on meta game. As a result, core game-related monetization elements, such as boosters to help in tough spots, additional moves to complete a level or extra lives to continue playing are by far the most common ways to increase in-app purchases (IAP) revenue among all Puzzle games.
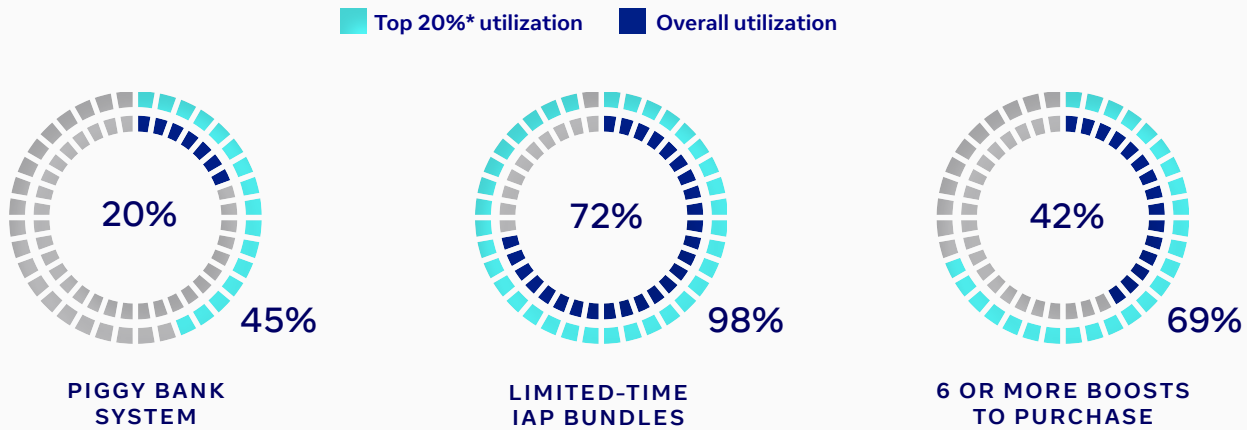

Legend: ■ US ■ UK ■ JAPAN ■ SOUTH KOREA

Chart 1 — Boosts to purchase: US 89%, UK 88%, Japan 80%, South Korea 85%. IAP actions in tutorial: US 74%, UK 72%, Japan 68%, South Korea 69%.

Chart 2 — Premium currency: US 62%, UK 62%, Japan 61%, South Korea 59%. Continue to be purchased: US 83%, UK 82%, Japan 84%, South Korea 86%. Skipping waiting times with money: US 83%, UK 82%, Japan 80%, South Korea 81%.

Source: GameRefinery data based on statistical sampling of iOS top grossing 10,000 games in US, UK, Japan and South Korea, Q1 2020

KEY FEATURES
(TOP PUZZLE GAMES WIN WITH THESE)

There isn't a huge difference in monetization methods between the top grossing Puzzle game and the others, but a couple of interesting points stand out. Firstly, the piggy bank system (i.e. each completed level adds currency to the piggy bank and once it's full, you can open it with a relatively small real money purchase) is significantly more common among the top Puzzle games. Also, they utilize limited-time in-app purchase (IAP) bundles more frequently and have broader variety of boosters to purchase.

Here are three key features that top Puzzle games utilize to stand out and drive in-app purchase (IAP) revenue:

Top 20%* utilization   **Overall utilization**

20%	72%	42%
45%	98%	69%
PIGGY BANK SYSTEM	**LIMITED-TIME IAP BUNDLES**	**6 OR MORE BOOSTS TO PURCHASE**

Source: GameRefinery data based on statistical sampling of iOS top grossing 10,000 games in US, UK, Japan and South Korea, Q1 2020

*Top grossing fifth of all Puzzle games in US, KO, JP, UK

PIGGY BANK SYSTEM

Piggy bank system is an interesting monetization approach that combines progressive in-game task with real-money purchase. It's something Puzzle and Casino games have started to utilize for an additionalrevenue boost.

In a nutshell, you increase the currency amount in the bank through in-game activities (usually completing levels) and once the bank is full, you can open it by making a one-time purchase. The kicker is that you get much more currency than you'd get through normal in-app purchase.

FISHDOM – FISHY BANK
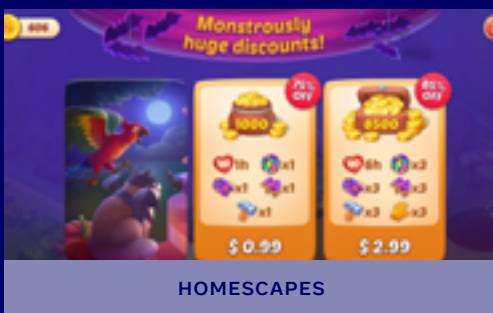
LIMITED-TIME IAP BUNDLES

Bundling up several items and boosts together for a discount is something all mobile games use to increase revenue. However, it's especially common in the Puzzle genre and top titles use it to an extremely high degree.

Developers have always played with changing price points versus value gained, but have recently started to innovate e.g. Progressional IAP offers with exclusive decoratives given on top of the normal deal.

HOMESCAPES
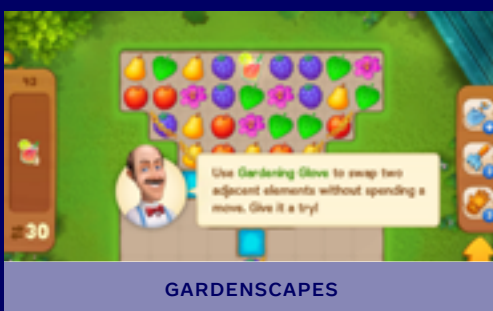
6 OR MORE BOOSTS TO PURCHASE

As stated, one of the key monetization mechanics of Puzzle games has traditionally been boosters that help players get through the hardest levels and trickiest situations.

Practically all Puzzle games that use in-app purchases to monetize give players the option to spend money on boosters but the top ones have much broader assortment to choose from. Having different boosters for different situations and challenges tends to increase collective monetization effectiveness overall.
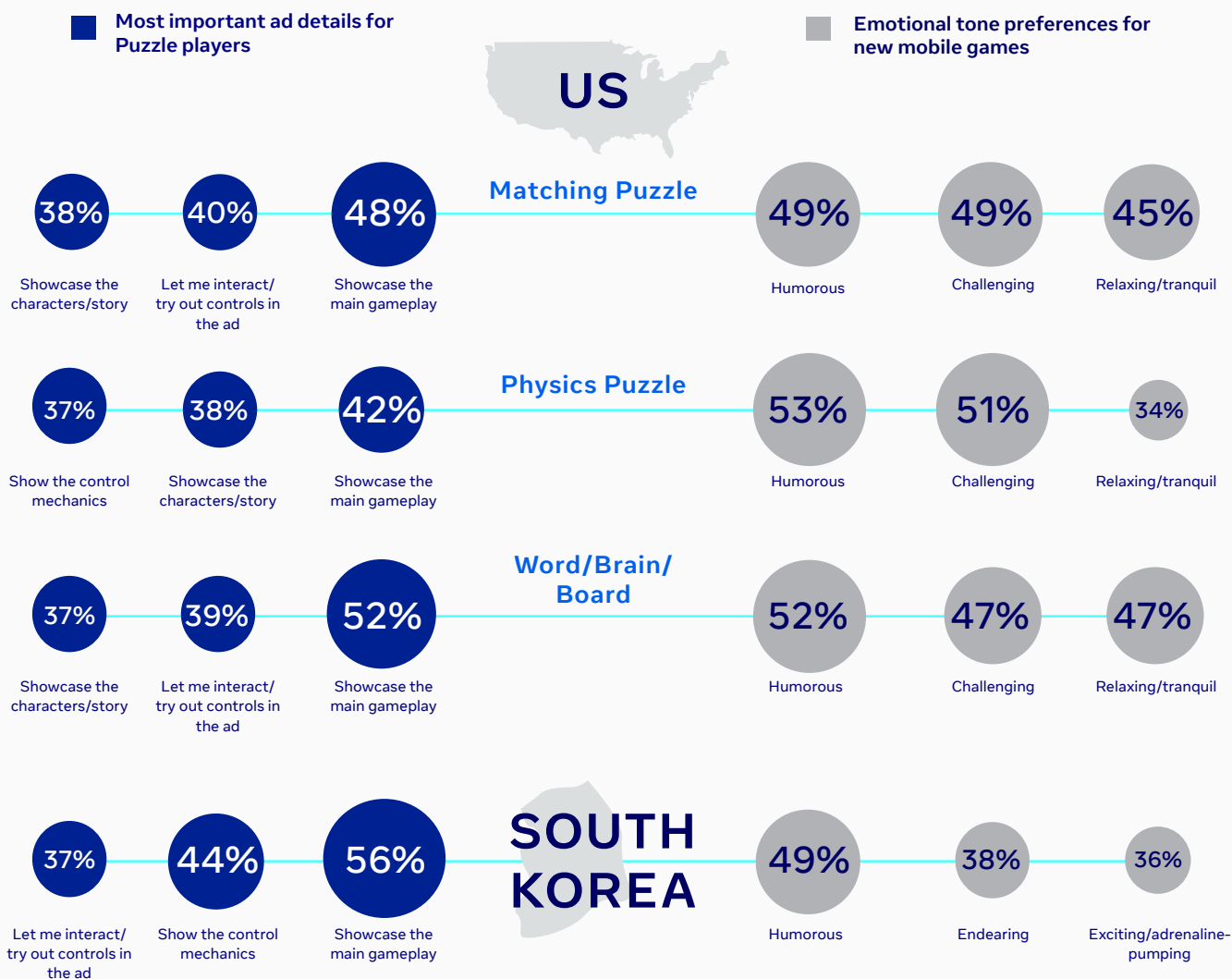
GARDENSCAPES

Creating an effective ad strategy

Around two-thirds of Puzzle players in the US and UK say they are willing to take the time to learn how to play a new game if an advertisement makes it look appealing enough.
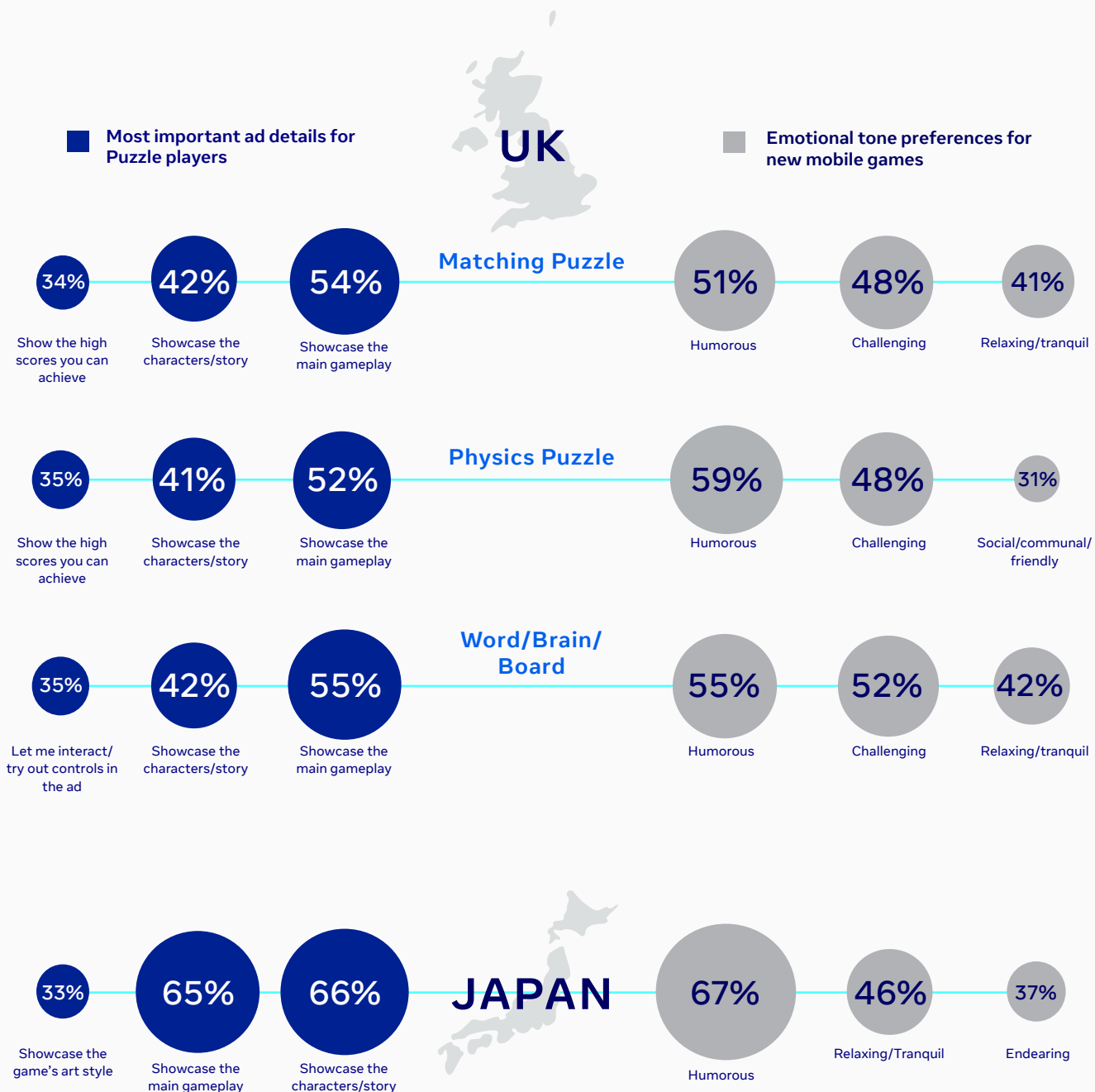
To capture attention, it's important for marketers to include the most relevant messaging and tone. Effective ads that attract Puzzle players showcase the main gameplay and the characters/storyline. Highlighting characters should be considered when advertising to Japanese Matching Puzzle players. There's also an opportunity to use playable ads to engage US and South Korean Puzzle players who want to try out the game mechanics as soon as they discover a new game.

Puzzle players want ads for new mobile games that communicate humorous and challenging tones. Humor is especially important for Matching Puzzle players in Japan along with endearing tone.

Most important ad details for Puzzle players

Emotional tone preferences for new mobile games

US

Matching Puzzle

38%	40%	48%		49%	49%	45%
Showcase the characters/story	Let me interact/ try out controls in the ad	Showcase the main gameplay		Humorous	Challenging	Relaxing/tranquil

Physics Puzzle

37%	38%	42%		53%	51%	34%
Show the control mechanics	Showcase the characters/story	Showcase the main gameplay		Humorous	Challenging	Relaxing/tranquil

Word/Brain/ Board

37%	39%	52%		52%	47%	47%
Showcase the characters/story	Let me interact/ try out controls in the ad	Showcase the main gameplay		Humorous	Challenging	Relaxing/tranquil

SOUTH KOREA

37%	44%	56%		49%	38%	36%
Let me interact/ try out controls in the ad	Show the control mechanics	Showcase the main gameplay		Humorous	Endearing	Exciting/adrenaline- pumping

Source: "Mobile Gaming Genre Study" by Interpret (Facebook IQ-commissioned online survey of 13,412 mobile games ages 18+ across AU, BR, CA, DE, FR, ID, IN, JP, KR, UK, US, Nov–Dec 2019)

Most important ad details for Puzzle players

Emotional tone preferences for new mobile games

UK

Matching Puzzle

34% Show the high scores you can achieve

42% Showcase the characters/story

54% Showcase the main gameplay

51% Humorous

48% Challenging

41% Relaxing/tranquil

Physics Puzzle

35% Show the high scores you can achieve

41% Showcase the characters/story

52% Showcase the main gameplay

59% Humorous

48% Challenging

31% Social/communal/ friendly

Word/Brain/ Board

35% Let me interact/ try out controls in the ad

42% Showcase the characters/story

55% Showcase the main gameplay

55% Humorous

52% Challenging

42% Relaxing/tranquil

JAPAN

33% Showcase the game's art style

65% Showcase the main gameplay

66% Showcase the characters/story

67% Humorous

46% Relaxing/Tranquil

37% Endearing

Bringing back lapsed players

Implementing an effective ad strategy can not only attract new Puzzle players, but also bring back lapsed players. Over 8 in 10 Puzzle players in the US and about 68% of players in Japan say they would be open to going back to a Puzzle game that they haven't played in the last 30 days.

In general, communicating new content or updates is the main driver to re-engaging these types of players with more than 3 in 10 Matching Puzzle players in the US, UK, Japan and South Korea saying this would influence them to go back to a game. Players' social circles both online and in-person also have a significant impact on reigniting interest. Just under one-third of US Physics Puzzle players say they would re-consider a game if someone brought it up in a conversation, and a quarter of Word/Brain/Board players in the UK would do the same if someone invited them to play online.

US
Matching Puzzle

31%
Hearing about new content or available updates

30%
Hearing about a reward for coming back

24%
Someone bringing up the game during an in-person conversation

US
Physics Puzzle

34%
Hearing about new content or available updates

31%
Someone bringing up the game during an in-person conversation

26%
Hearing about a reward for coming back

US
Word/Brain/Board

29%
Someone online inviting them to play the game with them

26%
Hearing about new content or available updates

26%
Someone bringing up the game during an in-person conversation

SOUTH KOREA

36%
Hearing about new content or available updates

35%
Hearing about a reward for coming back

20%
Seeing the game mentioned in social media by a friend/family

UK
Matching Puzzle

34%
Hearing about new content or available updates

28%
Someone bringing up the game during an in-person conversation

23%
Hearing about a reward for coming back

UK
Physics Puzzle

39%
Hearing about new content or available updates

27%
Someone bringing up the game during an in-person conversation

21%
Seeing the game mentioned in social media by a friend/family

UK
Word/Brain/Board

30%
Someone bringing up the game during an in-person conversation

28%
Hearing about new content or available updates

25%
Someone online inviting them to play the game with them

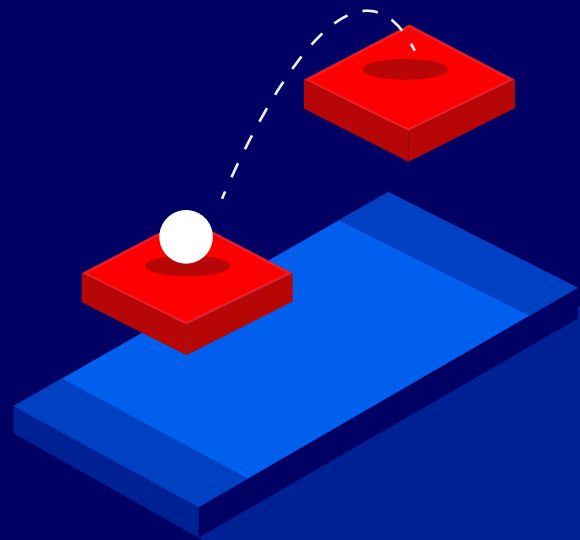## JAPAN

30%
Hearing about new content or available updates

17%
Someone bringing up the game during an in-person conversation

11%
Hearing about a reward for coming back

04
Hyper-Casual

Hyper-Casual executive summary

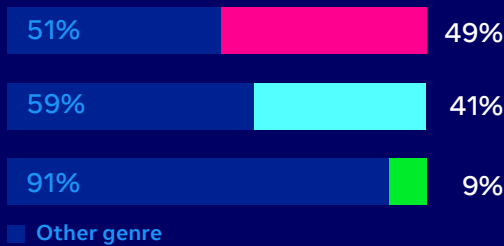|	INSIGHT	TAKEAWAY
1 GENRE FULFILLMENT	Hyper-Casual players value more from games beyond functional needs. In fact, they report enjoying gaming for several social and emotional reasons such as feeling accomplished, expressing themselves and being dazzled by uniqueness.	There's an opportunity for Hyper-Casual developers to stand out by implementing the right set of engaging Casual features such as decorative skins/accessories, collectibles albums or special playing modes.
2 COMMUNITY	Although Hyper-Casual players enjoy solo play more than other genres, there's appetite for more social activity within games.	Implementing trending Casual game features such as asking for help from friends, competitive ladder systems and co-op playing may be worth considering.
3 MONETIZATION	Hyper-Casual players are less likely to make in-app purchases and accept in-app ads to maintain free-to-play models. However as players show some interest in in-app purchases, developers could consider diversifying their monetization.	Ensure that new Hyper-Casual games are built to support in-app advertising. If there's interest in exploring in-app purchases, consider features like loot boxes, limited-time in-app purchase bundles or consumable boost items.
4 AD PREFERENCES	Across markets, humorous tones and interactive ads that highlight the gameplay and characters resonate well with Hyper-Casual players.	Personalize your marketing strategy to the needs and interests of Hyper-Casual players while taking into account market nuances.

State of
Hyper-Casual games

Simple, fun and easy to learn, Hyper-Casual games have dominated the download charts in markets such as the US and Europe in recent years, largely thanks to their broad appeal. Among the markets analyzed for this research, Hyper-Casual games were most popular in the US and the UK with about a quarter of all mobile gamers playing a Hyper-Casual game.

However, due to low penetration in Japan (where Hyper-Casual games only account for .04% of revenue and 1% of downloads), we have chosen not to include this market in our analysis.

HYPER-CASUAL MOBILE GAMING PLAYERSHIP[1]

UK
26%

US
24%

SOUTH
KOREA
21%

SHARE OF DOWNLOADS BY COUNTRY[2]

51%	49%	**US**
59%	41%	UK
91%	9%	**SOUTH KOREA**

■ Other genre

SHARE OF REVENUE BY COUNTRY[2]

0.4%	99.6%
0.6%	99.4%
0.1%	99.9%

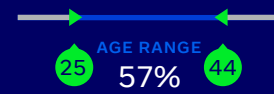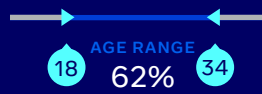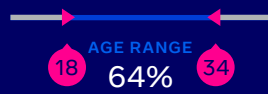■ Other genre

Who are Hyper-Casual players?

Unlike RPG and Strategy, Hyper-Casual players skew younger and female. While Hyper-Casual players primarily enjoy mobile gaming as a way to spend time in between daily activities, they also enjoy it for other social and emotional reasons. To players, mobile gaming helps them express something unique about themselves, and they enjoy connecting with others through gaming. They typically play games in shorter increments and prefer games with fun, stylized art designs rather than games with realistic features.
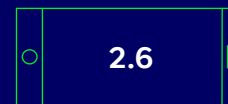
US **UK** **SOUTH KOREA**

GENDER AND AGE

55% / 45%	60% / 40%	60% / 40%
AGE RANGE 18–34 64%	AGE RANGE 18–34 62%	AGE RANGE 25–44 57%

AVERAGE NUMBER OF GAMES PLAYED

3	3.2	2.6

SAY THEIR TYPICAL PLAY SESSION LASTS OVER...

57% 20 MIN	55% 20 MIN	65% 30 MIN

PREFERENCE FOR STYLIZED ART

1.6x
more likely to prefer games stylized art than total US mobile players

1.2x
more likely to prefer games stylized art than total UK mobile players

51%
say they prefer mobile games with stylized art

WHY THEY PLAY MOBILE GAMES

1.4x
times more likely to say expressing something about themselves is what makes mobile gaming very appealing compared to total US mobile players

1.2x
times more likely to say expressing something about themselves is what makes mobile gaming very appealing compared to total UK mobile players
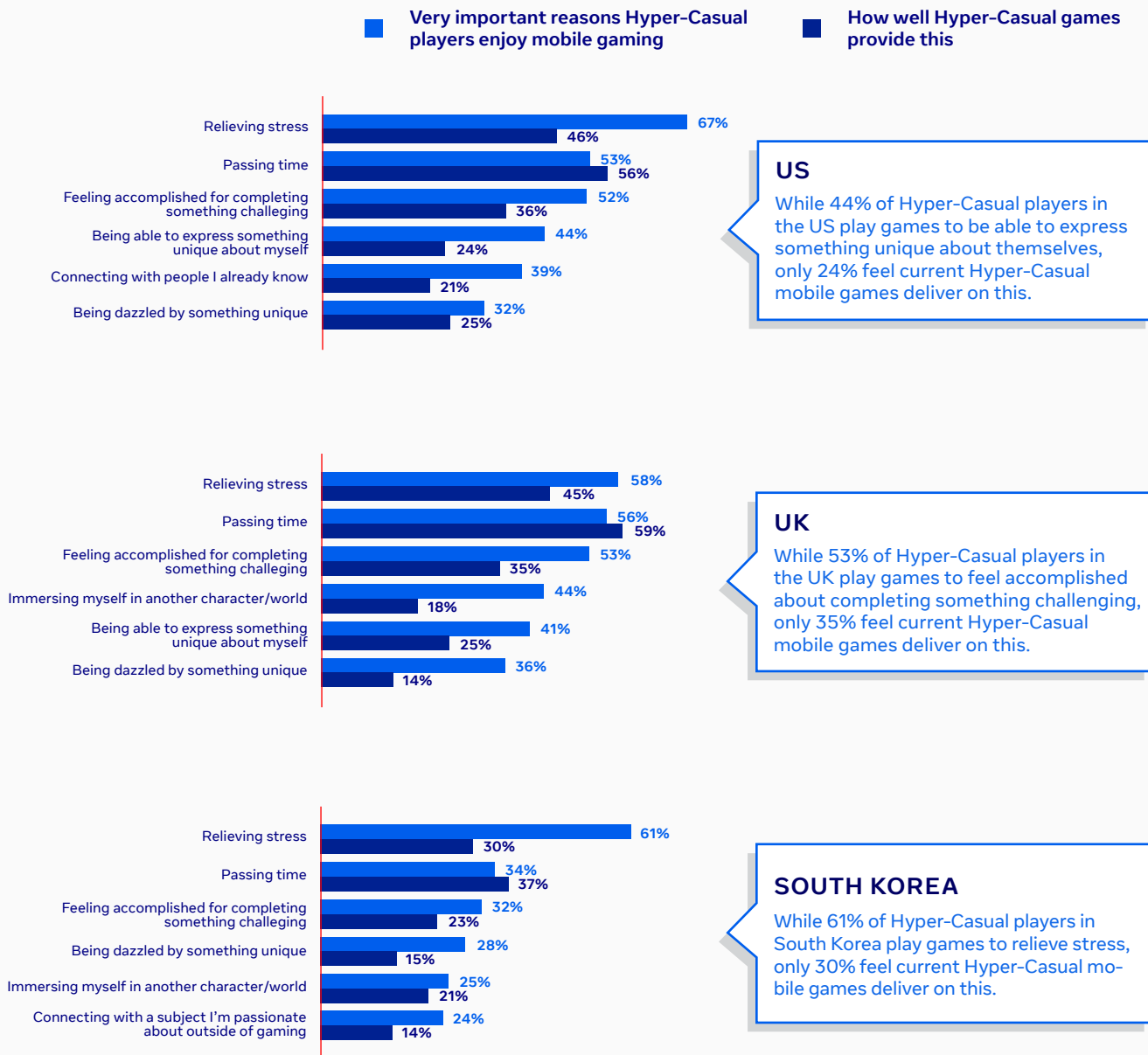
1.3x
more likely to prefer chatting with others during gameplay than total South Korean mobile players

Genre fulfillment

Understand player motivations and how to deliver on them

Why people play

Hyper-Casual players predominantly enjoy playing mobile games to relieve stress and pass time between daily activities; something they feel that this genre often delivers on.

However, Hyper-Casual players value more from games beyond functional needs. In fact, they report enjoying gaming for several social and emotional reasons such as feeling accomplished, expressing something about themselves and being dazzled by uniqueness. Hyper-Casual players often feel that this genre falls short in delivering against these non-functional needs.

■ **Very important reasons Hyper-Casual players enjoy mobile gaming**　■ **How well Hyper-Casual games provide this**

Reason	Very important	How well provided
Relieving stress	67%	46%
Passing time	53%	56%
Feeling accomplished for completing something challenging	52%	36%
Being able to express something unique about myself	44%	24%
Connecting with people I already know	39%	21%
Being dazzled by something unique	32%	25%

US

While 44% of Hyper-Casual players in the US play games to be able to express something unique about themselves, only 24% feel current Hyper-Casual mobile games deliver on this.

Reason	Very important	How well provided
Relieving stress	58%	45%
Passing time	56%	59%
Feeling accomplished for completing something challenging	53%	35%
Immersing myself in another character/world	44%	18%
Being able to express something unique about myself	41%	25%
Being dazzled by something unique	36%	14%

UK

While 53% of Hyper-Casual players in the UK play games to feel accomplished about completing something challenging, only 35% feel current Hyper-Casual mobile games deliver on this.

Reason	Very important	How well provided
Relieving stress	61%	30%
Passing time	34%	37%
Feeling accomplished for completing something challeging	32%	23%
Being dazzled by something unique	28%	15%
Immersing myself in another character/world	25%	21%
Connecting with a subject I'm passionate about outside of gaming	24%	14%

SOUTH KOREA

While 61% of Hyper-Casual players in South Korea play games to relieve stress, only 30% feel current Hyper-Casual mobile games deliver on this.

Why people stray

Not delivering on these key motivations increases the chance of churn. Most Hyper-Casual players cite boredom and repetitiveness as the main reasons why they've abandoned Hyper-Casual games. Ad breaks that are too frequent can also detract from the game experience.
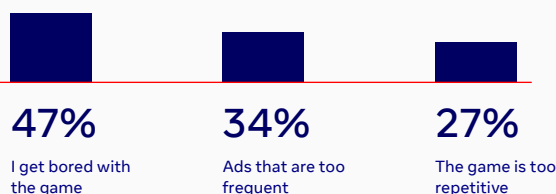
Hyper-Casual players generally stick to playing other Hyper-Casual games, but they also migrate toward the Puzzle genre. Interestingly, they are starting to tap into more midcore titles as well, having recently downloaded Action games across all three markets.

Top reasons why Hyper-Casual players stop playing Hyper-Casual games[1]

Top genres installed by Hyper-Casual mobile gamers[2]*

US

47%
I get bored with the game

34%
Ads that are too frequent

27%
The game is too repetitive

- Hyper-Casual
- Puzzle
- Action

UK

43%
I get bored with the game

38%
Ads that are too frequent

31%
The game is too repetitive
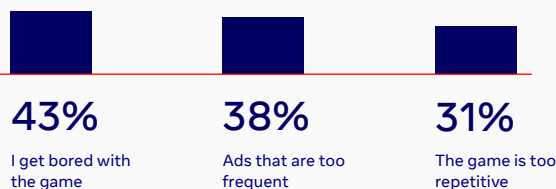
- Hyper-Casual
- Puzzle
- Action

SOUTH KOREA

42%
The game is too repetitive

37%
I get bored with the game

27%
Ads that are too frequent
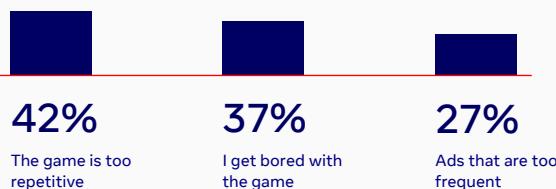
- Hyper-Casual
- Action
- Puzzle

Feature recommendations: Genre fulfillment

Hyper-Casual games are all about the core game experience, but as we see with Casual games in general, the introduction of light meta layer can enhance the overall user experience. Many top Hyper-Casual games have already realized this and started to add more collectable content and other meta elements to support their core game.

Here are examples of popular features in Casual games that would fit Hyper-Casual games' core and boost player engagement.

DECORATIVE SKINS IN
PERFECT CREAM

COLLECTIBLES ALBUM
IN SKY BALL

ARCADE MODE IN
TOMB OF THE MASK
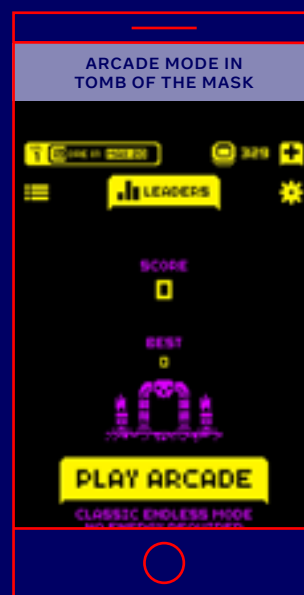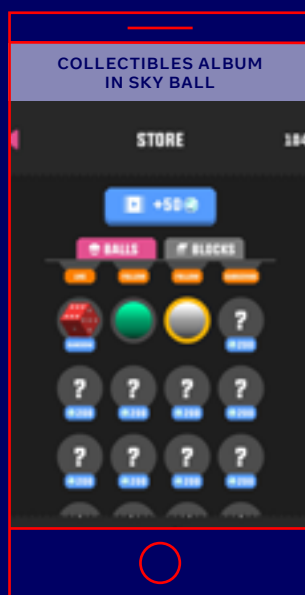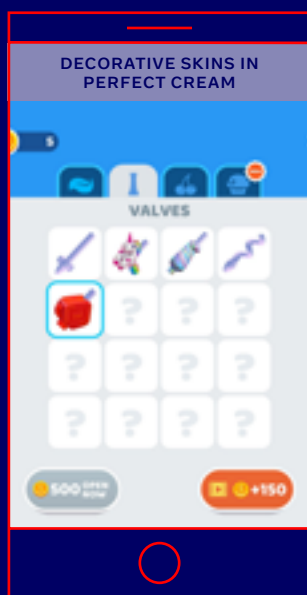
DECORATIVE SKINS/ ACCESSORIES

Decoratives are a great way to introduce progression and self-expression elements to Hyper-Casual games while also providing a sense of accomplishment.

From a game design perspective, decoratives are versatile as they can be attached to various parts of the game and tie into different accomplishments easily. Moreover, the effect decoratives have on gameplay, are minimal making them less likely to cause in-game balance issues.

Finally, implementing decoratives not only increases collection and progression aspects, but can potentially open up new revenue streams through in-app purchases.

COLLECTIBLES ALBUM

Hyper-Casual games often lack session-to-session progression as there are no meta elements and the focus is purely on core gameplay. However, this simplicity – which is part of Hyper-Casual games' charm – is also why player churn can be high.

Introducing a collectibles album with decorative items/characters/skins, for example, would increase the sense of progression and accomplishment without taking away from the Hyper-Casual nature. Adding a light collectible meta layer is something that has really benefited top Casual games and there's no reason why it wouldn't work on majority of Hyper-Casual titles as well.

SPECIAL PLAYING MODES

To solve for boredom and repetitiveness experienced by players, Hyper-Casual games could implement special playing modes with a fresh set of rules, mechanics and goals.

This kind of "side-mode" would be possible to add to practically any Hyper-Casual game without having to meddle with the "normal" core loop, which makes it extremely versatile solution for developers. What's even better, these special playing modes could be tied together with decoratives and collectible albums already mentioned by introducing special rewards acquirable exclusively by playing them.

Community

Community in Hyper-Casual games

Over half of Hyper-Casual players in the US and UK have engaged in social activities related to the genre. There's appetite for more social activity within Hyper-Casual games with 67% of players in the UK and 74% of players in the US expressing interest in activities such as communicating with gaming companies and other players online about Hyper-Casual games and checking out other players' high scores on a leaderboard. One third of Hyper-Casual players in South Korea would also be interested in joining an online group or community for Hyper-Casual games.

Online communities are an increasingly popular source of community for Hyper-Casual players with 41% of US players and 47% of South Korean players participating in an online gaming community weekly. Among those who participate in these communities, 50% of US Hyper-Casual players say they do so to see entertaining gameplay content while 49% of players in the UK go to these groups to learn about upcoming updates or game content releases.

SOCIAL/COMMUNITY ACTIVITIES THAT HYPER-CASUAL PLAYERS WOULD BE OPEN TO DOING IN THE FUTURE

US

41% Viewing/liking/commenting on posts from people you don't know outside of gameplay

41% Viewing/liking/commenting on posts from the official game/company

35% Checking out other players' scores/achievements online

UK

30% Chatting in-person with people about Hyper-Casual games

30% Viewing/liking/commenting on posts from people you don't know outside of gameplay

28% Chatting online with people about Hyper-Casual games

SOUTH KOREA

41% Viewing/liking/commenting on posts from people you don't know outside of gameplay

33% Participating in an online group/forum/bulletin board about Hyper-Casual games

32% Checking out other players' scores/achievements online

Hyper-Casual developers have the power to build and enhance communities by providing the right content. And Hyper-Casual players are keen to hear from game developers with more than 8 in 10 players in the US and UK saying they'd be open to some type of messaging from brands.

Across markets, tips and tricks as well as information on upcoming in-game events are particularly of interest for Hyper-Casual players. More than 1 in 4 US players are also interested in behind the scenes content while 28% of UK players would like to be able to provide feedback on the game's design.

INFORMATION HYPER-CASUAL PLAYERS WANT TO RECEIVE FROM MOBILE GAMES/DEVELOPERS

US

49%	46%	45%	35%	28%
Tips, tricks and strategies	Upcoming updates or game content releases	Questions and answers	Upcoming in-game events	Behind-the-scenes content

UK

50%	37%	35%	35%	28%
Tips, tricks and strategies	Questions and answers	Upcoming updates or game content releases	Upcoming in-game events	Being able to influence or provide feedback on the game

SOUTH KOREA

44%	41%	40%	36%	36%
Upcoming in-game events	Tips, tricks and strategies	Questions and answers	Upcoming updates or game content releases	Customer service/ product support

Feature recommendations: Community

As Hyper-Casual players are socially active and have an appetite for playing with others, developers should recognize these needs by introducing more community features and social content to Hyper-Casual games.

Social features have been trending heavily among Casual games for a while now. Due to the similarities between Casual and Hyper-Casual game user bases, light social features would be effective in driving success among Hyper-Casual games as well.

Here are examples of popular social features in Casual games that would fit Hyper-Casual games' core and boost player engagement if implemented successfully.

HELPING OTHERS IN GALAXY ATTACK: ALIEN SHOOTER

TOURNAMENT LADDER IN YAHTZEE WITH BUDDIES

CO-OP PLAYING IN ARCHERO

SEND/ASK FOR HELP FROM FRIENDS

Sending and asking for various types of help (items, lives, boosts) is a common social feature among Casual games. It's rather light to implement and provides player-to-player interaction without affecting the game's balance or other areas too much.

In Hyper-Casual games sending help could relate to in-game currency, duplicate skins and other decorative items or being able to boost friends through certain levels they have a hard time completing.
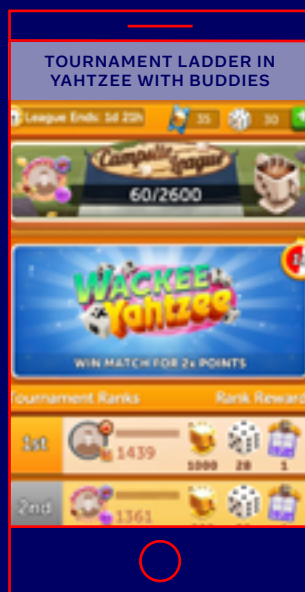
COMPETITIVE LADDER SYSTEM

Being able to compete with others and compare rankings is something that tends to increase player engagement across all games.

Leaderboards are the easiest way to achieve this, but taking things a bit further by introducing a ladder system with regularly restarting seasons is an even more powerful way to enhance social and competitive aspects to Hyper-Casual games.

This is yet another example of a feature that's popular among Casual games that would work just as well in the Hyper-Casual space.

CO-OP PLAYING

Playing together with friends and other players is another form of highly-engaging social interaction that is not common among Hyper-Casual games. However, there's no foundational reason for this lack of co-op playing, as it could be implemented very well into almost any Hyper-Casual game.

Co-op playing could be, for example solving tough Puzzles together, advancing side-by-side in an endless platformer or taking turns creating a beautiful soap sculpture you both can marvel at. As so often with mobile game feature implementations, your imagination is the only limit!

In-app purchases and in-app ads

Across the US, UK and South Korea, Hyper-Casual is among the genres that players are least likely to make in-app purchases. Less than 4% of players of this genre make in-app purchases.[1]

When it comes to in-app purchases, over half of Hyper-Casual players prefer making purchases directly as opposed to those with a random element. One noteworthy geographical difference for in-app purchases is around pay-to-win options. In the US and UK, 52% and 54% of Hyper-Casual players respectively say in-app purchases should be limited to items that cannot help you. However, South Korean Hyper-Casual players are supportive of pay-to-win options with 61% agreeing that in-app purchases should include items that can help you win.[2]

% OF PLAYERS WHO MAKE AN IN-APP PURCHASE IN A MONTH[1]

3%
UK

3.7%
US

1.9%
SOUTH KOREA
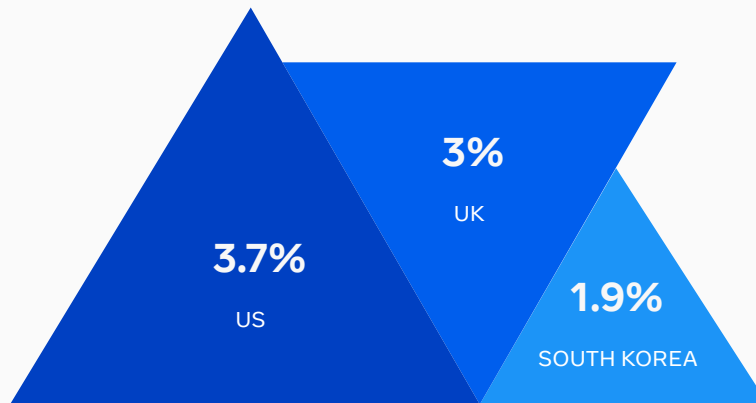
IN-APP AD LENGTH & FREQUENCY PREFERENCES AMONG HYPER-CASUAL PLAYERS[2]

| Over the course of 10 minutes playing a game app, I would prefer to see...	US	UK	SOUTH KOREA
ONE 30 SECOND AD	39%	39%	37%
TWO 15 SECOND ADS	23%	20%	16%
THREE 10 SECOND ADS	18%	30%	34%
SIX 5 SECOND ADS	19%	11%	14%

Since so few Hyper-Casual players make in-app purchases, in-app ads are a valuable way for developers to monetize games. Hyper-Casual players understand the value exchange of ads with 79% of US players and 85% of South Korean players saying they are okay with seeing in-app ads.[1]

% OF HYPER-CASUAL MOBILE PLAYERS WHO ARE OPEN TO IN-APP ADS
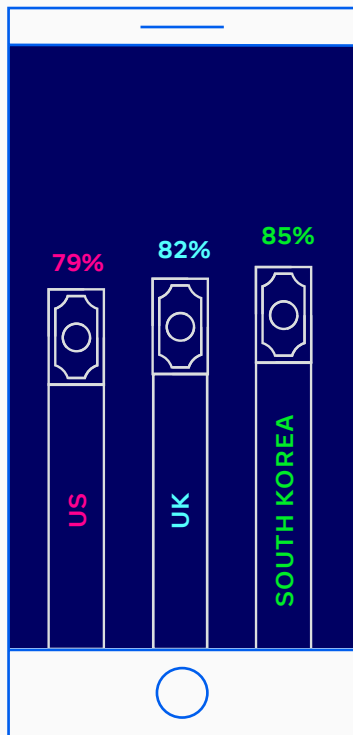
Research from App Annie shows that Casual games jumped an average of +198% in user sessions in the month after installing an ad SDK. Further to this, time spent was also not negatively impacted by incorporating ad SDKs; after the installation of a first ad SDK, total time spent in games actually increased compared to the pre period.[2]

For more information on incorporating ads into games, read the full App Annie report on Facebook Audience Network.

CASUAL GAMES AVG. TOTAL SESSIONS POST FIRST ADVERTISING PLATFORM SDK INSTALLATION[2]

79% 82% 85%

US   UK   SOUTH KOREA

4M

3M

2M

1M

0M

Install Month   +1   +2   +3

#Months Post-SDK
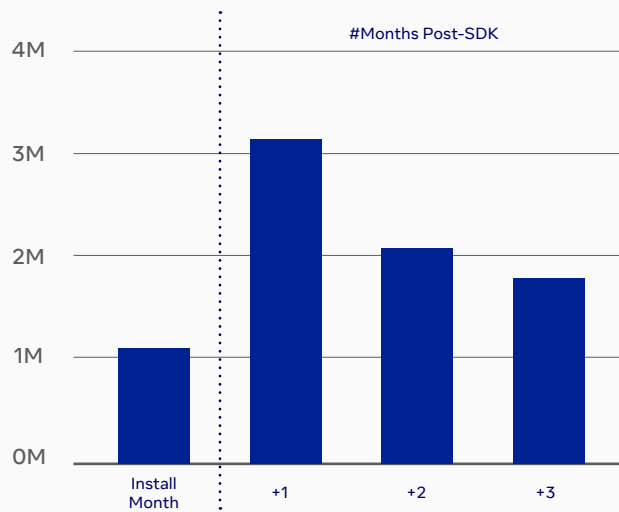
Among all Games worldwide within Casual genre from Jan-Dec 2019 with >0.02% user penetration which had its first ad SDK installed between Mar - Oct 2019 and App Annie detected ad monetization. Install Month refers to month in which an ad SDK was first installed

Nevertheless it's important to take into account player preferences for viewing in-app ads in order for it to provide value to the experience.

Generally, Hyper-Casual players prefer longer, less frequent ad breaks compared to shorter, more frequent ones. Over the course of 10 minutes of gameplay, over one-third of Hyper-Casual players in the US, UK and South Korea would like to see one 30 second ad as opposed to shorter ad units with more frequent breaks.

Incentivizing players to watch in-app ads can also be beneficial. For example, 69% of South Korean Hyper-Casual players say they prefer watching in-app ads when they receive a reward[1].

Feature recommendations: Monetization (in-app purchases)

Hyper-Casual games have traditionally relied heavily on ad monetization, but many top titles are also leveraging their revenues with various in-app purchase (IAP) mechanics.

When done right, IAP-monetization adds more sinks for players to spend money on without causing balance issues and obvious "pay-to-win" situations. In other words, IAP options enable Hyper-Casual game developers to tap into new revenue streams while maintaining the current user-base and engagement levels.

Here are examples of IAP monetization features to increase player LTV and revenues in Hyper-Casual games.

LOOT BOX IN
GO KNOTS 3D

LIMITED TIME OFFER
IN HAPPY GLASS

SHIELD IN TOMB
OF THE MASK

LOOT BOXES

In combination with decorative items and collection mechanics already mentioned, a loot box system is an excellent way of introducing an IAP revenue stream to support ad-based monetization for Hyper-Casual games.

To unleash the full potential and excitement of loot boxes, developers should be ready to introduce new items, characters and decorations to the loot box pool on a regular basis so players have more items to collect. If the loot box pool is too small and static, it won't be able to maintain its allure to players, in turn hurting potential revenue.
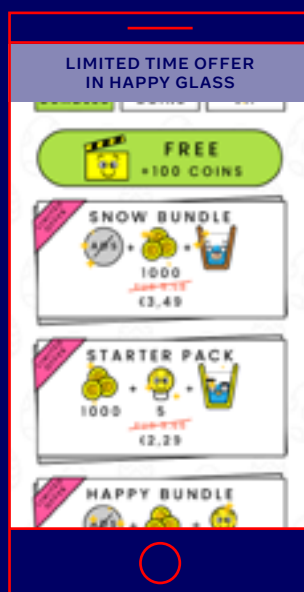
LIMITED-TIME IAP BUNDLES

Bundling items, currency and other goodies in one discount package is a proven way to increase player purchases and that's why almost every successful mobile game with IAPs utilizes them.

With IAPs becoming more common in top Hyper-Casual games, introducing limited-time bundle offers to players would greatly increase the revenue potential of monetized items, characters and currency. The key is to find just the right balance between bundle price and perceived value versus non-bundled "normal" purchases.

CONSUMABLE BOOST ITEMS

As Hyper-Casual games focus strongly on the core gameplay experience, it's only natural to monetize that area and Consumable boost items are a flexible and relatively easy solution to do just that. Damage boosts for shooting games, hints and tips for Puzzlers and shields for skill-based platformers are some examples of practical boost item implementations across both Casual and Hyper-Casual games.

However, as Consumable boosters affect the core gameplay, it's important to pay special attention to balance issues and IAP price points when designing them.

Ad preferences

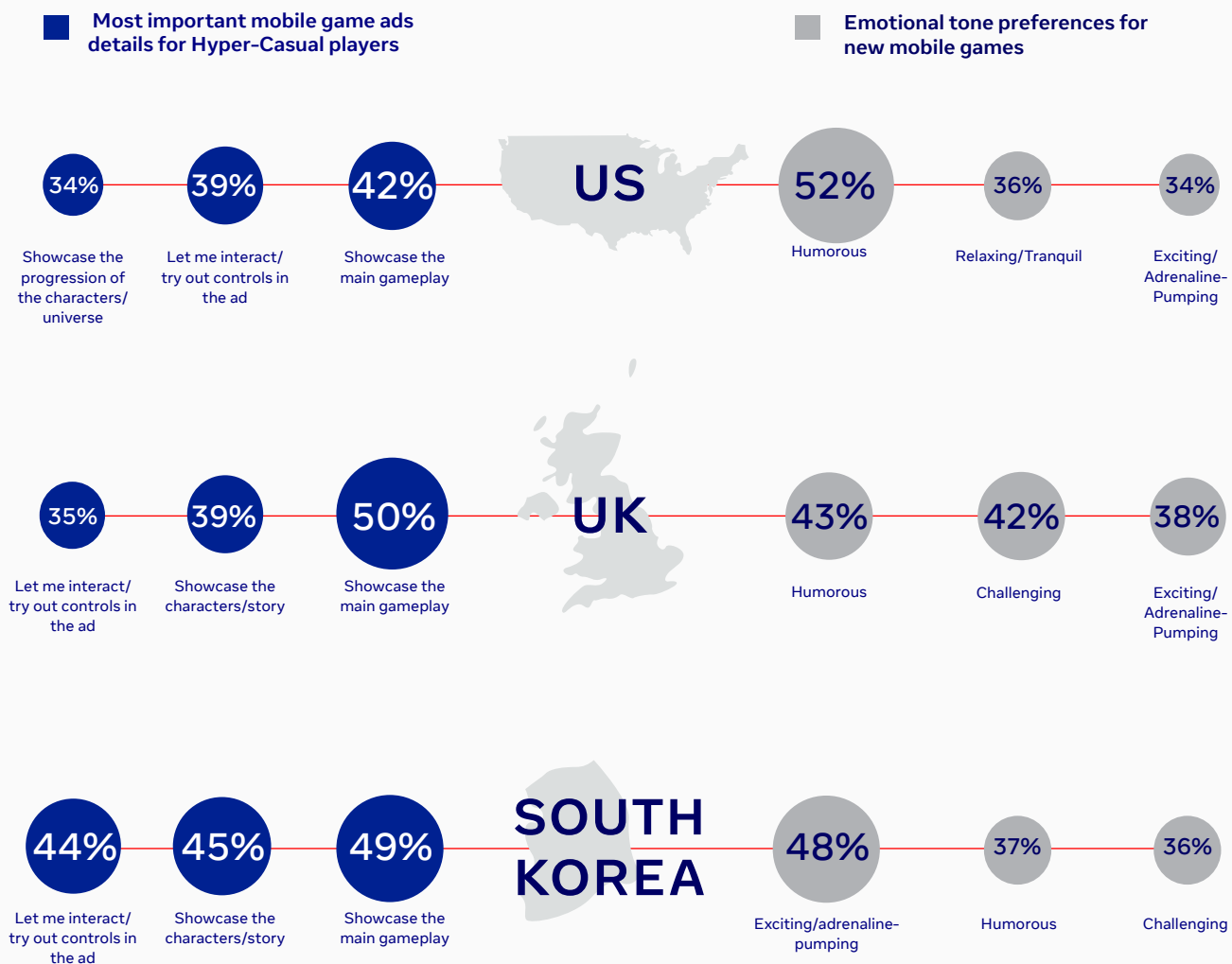**Entice people to try out new games and bring back players**

Creating an effective ad strategy

More than 6 in 10 Hyper-Casual players in the US, UK and South Korea say they are willing to take the time to learn how to play a new game if an advertisement makes it look appealing enough.

To capture attention, it's important for marketers to include the most relevant messaging and tone. Effective ads that attract Hyper-Casual players are ones that showcase the main gameplay and the characters/storyline. Players in this genre are also keen to be able to try out the game mechanics directly within the ad.

Hyper-Casual players want ads for new mobile games that communicate humorous and adrenaline-pumping tones. The interest in exciting, adrenaline-pumping tones is more emphasized among Hyper-Casual players in South Korea with 48% preferring this tone (compared to 34% of players in the US). Conversely, 52% of US Hyper-Casual players like funny ads, compared to 37% of South Korean players.

■ **Most important mobile game ads details for Hyper-Casual players**

■ **Emotional tone preferences for new mobile games**

US

34%	39%	42%		52%	36%	34%
Showcase the progression of the characters/ universe	Let me interact/ try out controls in the ad	Showcase the main gameplay		Humorous	Relaxing/Tranquil	Exciting/ Adrenaline-Pumping

UK

35%	39%	50%		43%	42%	38%
Let me interact/ try out controls in the ad	Showcase the characters/story	Showcase the main gameplay		Humorous	Challenging	Exciting/ Adrenaline-Pumping

SOUTH KOREA

44%	45%	49%		48%	37%	36%
Let me interact/ try out controls in the ad	Showcase the characters/story	Showcase the main gameplay		Exciting/adrenaline-pumping	Humorous	Challenging

Source: "Mobile Gaming Genre Study" by Interpret (Facebook IQ-commissioned online survey of 13,412 mobile games ages 18+ across AU, BR, CA, DE, FR, ID, IN, JP, KR, UK, US, Nov–Dec 2019)

To promote its title Virtual Families: Cook Off game, Gogii Games tested 3 ad formats; photo, video and playable ads. By using the playable ad solution, potential players could preview a mobile game in an immersive and interactive experience right in their News Feed, proving to be a winning format for this game.

VIRTUAL FAMILIES: COOK OFF

Bringing back lapsed players

Implementing an effective ad strategy can not only attract new Hyper-Casual players, but also bring back lapsed players. 79% of Hyper-Casual players in the UK and about 81% of players in the US say they would be open to going back to playing a Hyper-Casual game that they haven't played in the last 30 days.

Communicating new content or updates is the main driver for re-engaging players in the UK and South Korea with about one-third of Hyper-Casual gamers saying this would be influential. Peer influence is particularly appealing for US players with 38% saying they'd return to playing a game if someone brought up the game in a conversation. Social media buzz can also help motivate 1 in 5 players in the US and UK.

**WHAT COULD INFLUENCE HYPER-CASUAL PLAYERS TO RETURN OR RE-DOWNLOAD
A GAME THEY HAVEN'T PLAYED IN 30 DAYS**

US

38%
Someone bringing up the game during an in-person conversation

32%
Hearing about new content or available updates

23%
Seeing the game mentioned in social media by a friend/family

UK

34%
Hearing about new content or available updates

26%
Hearing about a reward for coming back

22%
Seeing the game mentioned in social media by a friend/family

SOUTH KOREA

33%
Hearing about new content or available updates

29%
Hearing about a reward for coming back

21%
Seeing news articles or blog posts about the game

Source: "Mobile Gaming Genre Study" by Interpret (Facebook IQ-commissioned online survey of 13,412 mobile games ages 18+ across AU, BR, CA, DE, FR, ID, IN, JP, KR, UK, US, Nov–Dec 2019)

Appendix

Strategy

KEY FEATURE DEFINITONS

Feature	Definition
Special PvE modes	Special single player modes or non-PvP multiplayer modes that depart from the main campaign and have unique gameplay mechanics or rules.
Exclusive live event rewards	Exclusive rewards earned by participating in live events. These include, for example, various characters, items, units, buildings and decoratives that can only be acquired through event participation.
Salvage characters/items	The possibility to scrap or destroy already owned items and/or characters to gain resources, experience or material items in exchange. For example, in some Strategy games players can scrap weapons and armor to get material items needed in crafting new weapon and armor.

BASIC FEATURE DEFINITONS

Feature	Definition
Over 20 different permanent buildings	Constructable buildings, building-like territories or other "constructables" to be built or purchased by the player.
Recurring live events	Recurring live events are limited-time instances with special mechanics or themes that restart or keep coming back after a while.
Non-recurring live events	Non-recurring live events are limited-time instances with special mechanics or themes that don't restart or keep coming back regularly. In other words, they are unique, one-time events that don't have a set looping schedule.
Achievement system	Achievements are set thresholds or goals relating to gameplay progression, usually rewarding players once completed.
Visual progression of buildings/units	The visual appearance of items, characters, units or buildings clearly change when they are developed by the player (e.g. advance levels, are upgraded or get new gear).
Collectibles album	A specific menu/section in the game where players can view their collection of characters or items . Allows players to see what they have yet to find/acquire out of all the possible collectible characters or items in the game.
Daily login rewards	A system that gives players a free gift (e.g. currency, items, experience points etc) once a day when logging into the game .

2

KEY FEATURE DEFINITONS

Feature	Definition
Guild Wars & competitions	Guild-related competitive tasks, stages, efforts etc to be completed/played together with your own guild trying to beat rival guilds.
Co-op tasks	Various tasks/quests/milestones to be completed together with friends, guild mates or other players
Donating items & resources	The possibility to permanently donate/give items and/or resources to other players.

BASIC FEATURE DEFINITONS

Feature	Definition
Special benefits from communal activities/PvP	Exclusive items, characters and boosts (e.g. "guild perks") players can get only through communal activity (e.g. being a member of a guild or helping your friends) or by participating in PvP modes.
See other players' progression	The possibility to explicitly see how other players have progressed or are progressing in the game.
Highscore lists/leaderboards	Lists of players who have scored the highest in certain levels/stages/events (regional/global leaderboard, event leaderboard, guild leaderboard etc).
Chat/messaging	A chat system or another method of sending direct messages (e.g. emoticons or emotes) to other players.
Send/ask help	Sending or asking any kind of direct help or gifts (e.g. resources, energy, extra lives or in-game currency) to/from other players.
Asynchronous PvP	Games that have asynchronous player vs player playing possibility, i.e. you can play directly against other players (for example attack other players) in an asynchronous setting. Asynchronous means that your opponent is controlled by AI and not by a real live player.
Guild mechanics	Guilds are in-game social communities which players can create and join to engage and play with others.

3

KEY FEATURE DEFINITONS

Feature	Definition
Battle pass system	Battle pass is a season-based monetization mechanic in which players can obtain rewards by progressing through different thresholds in the plan. This can happen, for example, by completing tasks or progressing in the game. Battle passes have two different tiers: free and premium. The free layer is open for everyone, while access to the premium tier with better rewards can be unlocked with an in-app purchase (IAP).

3

BASIC FEATURE DEFINITONS

Feature	Definition
Consumable boosts to purchase	Consumable boosts and items grant a temporary or one-time boost/benefit when used and are lost or depleted in the process.
Crafting/ingredient items to purchase	Items that are used as materials or ingredients for creating new items or characters.
Limited-time IAP bundle offers	Special in-app purchase (IAP) offers that wrap assortment of items, characters and/or currency together with a discount and are available only for a limited time.
Skipping waiting times with money	It's possible to make a purchase (IAP) to skip waiting times or session length restrictions (e.g. speed up construction, buy more lives/energy etc).
VIP system	Being a VIP player entitles you to special in-game bonuses (faster resource generation, bonus to character stats etc) and VIP level is usually increased by making real-money purchases in the game. In these games, there are often different "VIP levels" that you can achieve if you use more real money in the game. The higher your VIP level, the higher the in-game bonuses.

RPG

1

KEY FEATURE DEFINITONS

Feature Name	Description
Event versions of characters	Special versions of the characters already in the game that are tied to live events. These event-related special versions may or may not have the same stats as the original "normal version" , but it's important that these two are clearly distinguishable from each other.
Special live event currency	A special in-game currency earned by participating in live events and used to purchase various (usually) event-related items, such as characters, items and loot boxes.

BASIC FEATURE DEFINITONS

Feature	Definition
Daily quest	A system that gives players explicit quests/tasks to be completed daily for rewards.
Character ingredient items	Items that are used as materials for creating new characters (e.g. "hero shards").
Collectibles album	A specific menu/section in the game where players can view their collection of characters or items . Allows players to see what they have yet to find/acquire out of all the possible collectible characters or items in the game.

Feature	Definition
Non-recurring live events	Non-recurring live events are limited time instances with special mechanics or themes that don't restart or keep coming back regularly. In other words, they are unique, one-time events that don't have a set looping schedule.
Recurring live events	Recurring live events are limited-time instances with special mechanics or themes that restart or keep coming back after a while.

2

KEY FEATURE DEFINITONS

Feature	Definition
Co-op PvE modes	Special co-operational playing mode/modes, where friends, guild mates or random acquaintances play together against an AI-controlled enemy or monsters (PvE).
Special social currency	A special in-game currency earned by participating in social activities or PvP-gaming. It's usually used in s specific shop (e.g. Guild Shop) to purchase characters, items and gachas/loot boxes.

BASIC FEATURE DEFINITONS

Feature	Definition
Ladder/season system in PvP	Ladder/season system is a dynamic leaderboard where players' rankings improve by accumulating points from various activities, such as victories over other players or completing levels. The higher players get in the ladder, the better rewards they receive. After a season (usually a month) ends, a new season starts and restarts players' progression in the ladder.
Filtered PvP matchmaking	Players cannot freely choose opponents in PvP matches, but the AI filters a couple of opponents of similar power level to choose from OR players are automatically matched against an opponent by the AI.
Special benefits from communal activities/PvP	Exclusive items, characters and boosts (e.g. "guild perks") players can get only through communal activity (e.g. being a member of a guild or helping friends) or by participating in PvP-modes.
Highscore lists/leaderboards	Lists of players who have scored the highest in certain levels/stages/events (regional/global leaderboard, event leaderboard, guild leaderboard etc).
Chat/messaging	A chat system or another method of sending direct messages (e.g. emoticons or emotes) to other players.
Send/ask help	Sending or asking any kind of direct help or gifts (e.g. resources, energy, extra lives or in-game currency) to/from other players.
Guild mechanics	Guilds are in-game social communities which players can create and join to engage and play with others.

3

KEY FEATURE DEFINITONS

Feature	Definition
5 or more different loot boxes	A loot box is a randomized mechanic (e.g. a chest, box or other gadget) used in games, so players never know exactly what they'll get when the loot box is triggered (i.e. "opened"). Loot boxes are usually purchased, but are sometimes received as free gifts or gameplay rewards.
Bulk discount loot boxes	Explicit discount offer for purchasing several loot boxes at a time. These bulk offers come in various forms, but the idea is always to incentivize players to purchase more than one loot box at a time (e.g. "Buy 9 hero summons and get one random 5-star legendary hero for free").

BASIC FEATURE DEFINITONS

Feature	Definition
Skipping waiting times with money	It's possible to make a purchase (IAP) to skip waiting times or session length restrictions (e.g. speed up construction, buy more lives/energy etc).
Limited-time IAP bundle offers	Special in-app purchase (IAP) offers that wrap assortment of items, characters and/or currency together with a discount and are available only for a limited time.
Character ingredient items	Items that are used as materials for creating new characters (e.g. "hero shards").
Consumable boosts to purchase	Consumable boosts and items grant a temporary or one-time boost/benefit when used and are lost or depleted in the process.
Continue/revive to purchase	Players can make a purchase (IAP) to revive their characters and continue playing if they are defeated in combat.

Puzzle

1

KEY FEATURE DEFINITONS

Feature	Definition
Recurring live events	Recurring live events are limited-time instances with special mechanics or themes that restart or keep coming back after a while.
Special live event currency	A special in-game currency earned by participating in live events and used to purchase various (usually) event-related things, such as characters, items and loot boxes.
6+ level goal types (match3)	Measures the number of different level goal types, i.e. requirements for winning a level in a match3 puzzle game (for example, "Score over 10,000 points" or "clear all ice blocks").

1

BASIC FEATURE DEFINITONS

Feature	Definition
Automated tutorial	New players are forced through a guided tutorial that shows them how the game is played.
6+ different block pieces (match3 games)	Block pieces are non-regular board pieces which have special mechanics and act as obstacles, increasing the challenge of the level.
Non-recurring live events	Non-recurring live events are limited time instances with special mechanics or themes that don't restart or keep coming back regularly. In other words, they are unique, one-time events that don't have a set looping schedule.
Daily login gift	A system that gives players a free gift (e.g. currency, boosters etc) once a day when logging into the game.
Consumable boost items	Gant a temporary or one-time boost/benefit when used and are lost or depleted in the process.
New mechanics introduced progressively	New kind of level types, rule sets or board pieces/cards are introduced reguarly as the player progresses further in the game.

2

KEY FEATURE DEFINITONS

Feature	Definition
Guild mechanics	Guilds are in-game social communities which players can create and join to engage and play with others.
Competitive ladder system	Competitive ladder system is a dynamic leaderboard where players' rankings improve by accumulating points from various activities, such as victories over other players or completing levels. The higher you get in the ladder, the better rewards you receive.
Co-op tasks	Various tasks/quests/milestones to be completed with friends, guild mates or random players.

BASIC FEATURE DEFINITONS

Feature	Definition
Social media login	Possibility to link one's game account to Facebook or other social media.
See other players' progression	The possibility to explicitly see how other players have progressed or are progressing in the game.

Feature	Definition
Send or ask lives/energy	Sending or asking lives or energy to/from other players to be able to play more.
Highscore lists/leaderboards	Lists of players who have scored the highest in certain levels/stages/events (regional/global leaderboard, event leaderboard, guild leaderboard etc).

KEY FEATURE DEFINITONS

Feature	Definition
Piggy bank system	A special deposit-feature where currency/rewards accumulate and are stored every time players do specific actions (e.g. complete a level). Players can break the piggy bank at any time by paying a fixed price and gain all the accumulated currency/rewards.
Limited time IAP bundles	Special in-app purchase (IAP) offers that wrap assortment of items, characters and/or currency together with a discount and are available only for a limited time.
6+ boosts to purchase	Consumable boosts and items grant a temporary or one time boost/benefit when used and are lost or depleted in the process.

BASIC FEATURE DEFINITONS

Feature	Definition
Boosts to purchase	Consumable boosts grant a temporary or one time boost/benefit when used and are lost or depleted in the process.
IAP Actions in tutorial	New players are shown the power of in-app purchases by giving them, for example, free boosters and showing how helpful they can be in the game.
Continue to be purchased	Players can make a purchase (IAP) to continue playing a level once they've already failed (e.g. extra moves in Match3 games).
Skipping waiting times with money	Players can make a purchase (IAP) to skip waiting e.g. for lives/energy to refill.

Hyper-Casual

KEY FEATURE DEFINITONS

Feature	Definition
Decorative skins/accessories	Decorative skin items usually change the entire appearance of a character, building or an item (e.g. weapons in certain shooter games) as opposed to decorative accessories that alter only a specific portion of the object, for example, a character's head.

Feature	Definition
Collectibles album	Collectibles album is a specific menu/section in the game where players can view their collection of characters or items . Moreover, collectibles album allows players to see what they have yet to find/acquire out of all the possible collectible characters or items in the game.
Special playing modes	Special game modes that depart from the main level progression and have unique gameplay mechanics or rules.

KEY FEATURE DEFINITONS

Feature	Definition
Send/ask help from friends	Sending or asking any kind of direct help or gifts (e.g. resources, energy, extra lives or in-game currency) to/from other players.
Competitive ladder system	Competitive ladder system is a dynamic leaderboard where players' rankings improve by accumulating points from various activities, such as victories over other players or completing levels. The higher players get in the ladder, the better rewards they receive.

KEY FEATURE DEFINITONS

Feature	Definition
Loot boxes	A randomized mechanic (e.g. a chest, box or other gadget) used in games, so players never know exactly what they'll get. Loot boxes are usually purchased, but are sometimes received as free gifts or gameplay rewards.
Limited-time IAP bundles	Special in-app purchase (IAP) offers that wrap assortment of items, characters and/or currency together with a discount and are available only for a limited time.
Consumable Boost Items	Consumable boosts and items grant a temporary or one-time boost/benefit when used and are lost or depleted in the process.