

Google for Games



2022 The Shifting Needs of Global Mobile Gamers



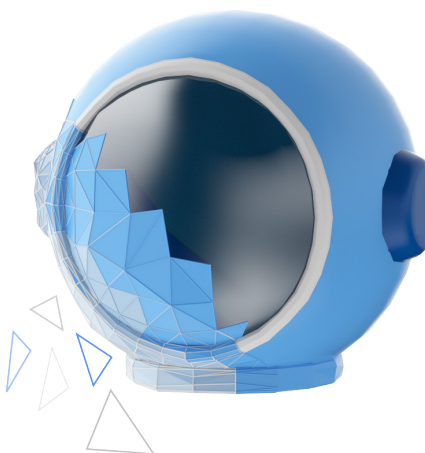
Foreword

Post pandemic macro effects on gamers' gaming behavior are resulting in new challenges and growth opportunities for game developers. The explosion of the global pandemic led to longer hours of staying at home using a mobile device, which resulted in an unprecedented growth in mobile gaming in the last 2 years. Despite a more steady trend now being observed, there is still a considerable increase compared to the pre-pandemic time.

With financial concerns biting into gamers' budgets, gamers pay more attention on spending smartly, and their life focus has changed along with the recovery of the market. Now is the time to refocus on what truly matters to gamers, especially during this time of 'new life' adjustment.

On Mobile, genre preferences are more varied, with 9 distinct subgenres being represented among the top 10 games by consumer spend in the first half of this year, which indicates that gamers are strongly seeking for variety and for diverse gaming experiences. Gaming is not just for lean-back leisure, but instead it stands for connection, for creativity, for learning, and for inspiration.

In this research, Google and Ipsos listened to thousands of mobile gamers across the world who were **experiencing a different life than what they had before**, and how that impacted their gaming attitudes and behavior, and especially a new gaming experience that in-game spenders now expect to have. We will share the 3 major shifts of gamers' needs and how to achieve stronger gamer immersion, helping game developers to respond to these changes and catch the growing opportunity by creating extraordinary mobile games.



Research Methodology and Scope

3 Game Subgenres

- 4X SLG
- Tycoon game
- Merge game

6 Game Markets

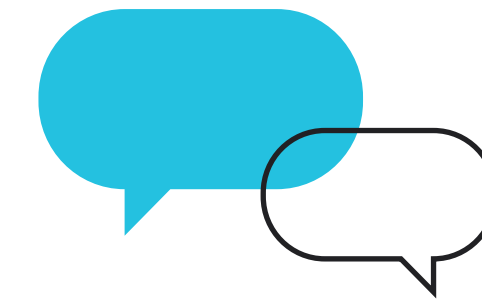
Interviewed 10,000+ Gamers

USA Japan Germany
South Korea Brazil Indonesia

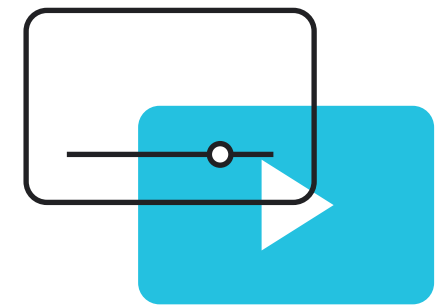
360° Gaming Behavior Analysis



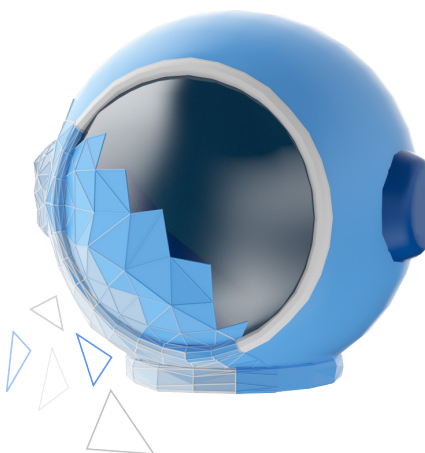
Consumer Survey



In-depth Interview



Self-recorded Video



Subgenre Game Definition



4X SLG

Combine real-time strategy, world-building, and role playing mechanics, where players engage in battles and build armies to attack and bases to defend. For example:




Rise of Kingdoms:
Lost Crusade



State of Survival:
Zombie War



Top War:
Battle Game



Tycoon

Focus on the management of economic processes, usually in the form of a business of construction. For example:



Hay Day



Township



SimCity BuildIt



Merge

Players solve puzzles by merging or sliding numbers, blocks, animals, or even characters. For example:



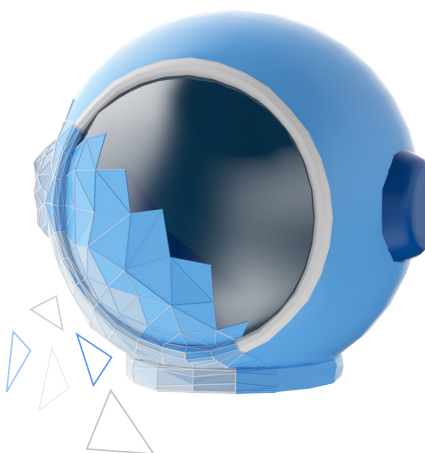
Merge Mansion



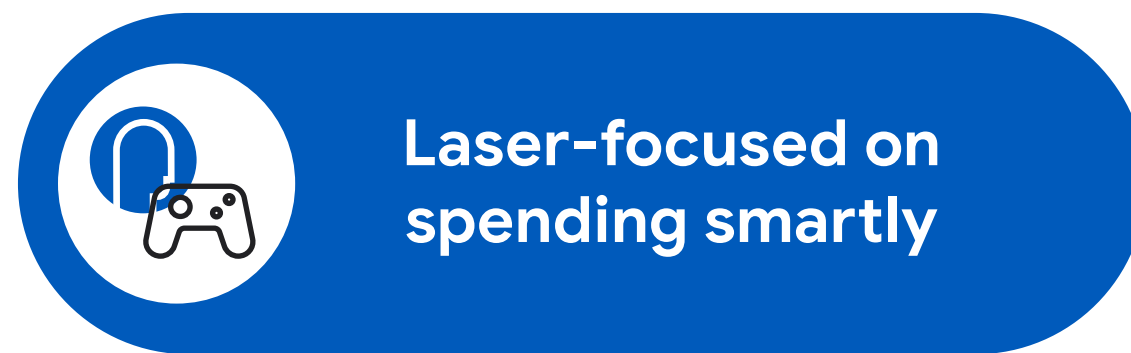
Merge Dragons!



EverMerge:
Merge 3 Puzzle



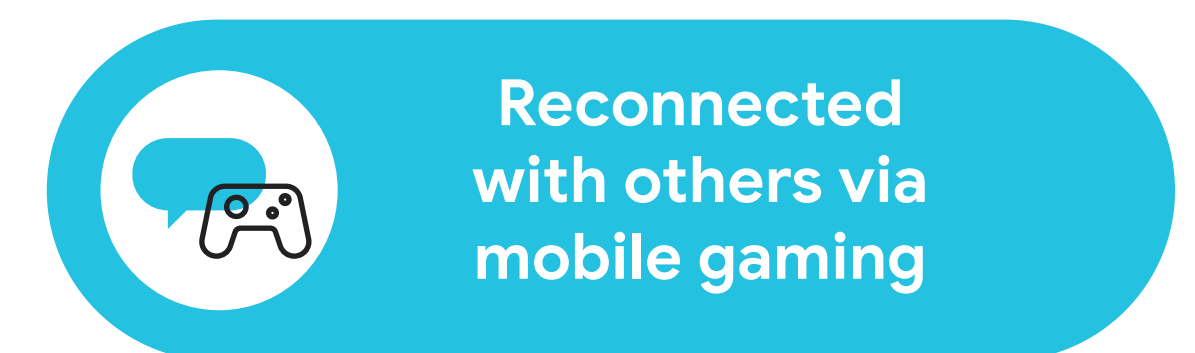
Three mobile gamer behavior shifts



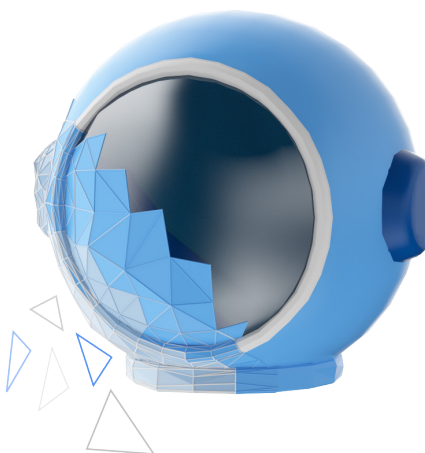
Rising prices and inflation concerns are driving a stronger focus on managing finances. Gamers are triggered by great value in-game promotions, and are more likely to purchase high quality content, which highlights the importance of building long-term gamer value. Rewards and bonuses can also ensure a better gaming experience.



More than 70% of mobile gamers also play on other devices. It is a trend that gamers have a stronger desire to experience the same game on different platforms. Cross-device gamers expect to have a seamless gaming experience that can better adapt to different device features.



With the pandemic slowdown, the demands of social reconnection have rebounded. Gamers either spend more time going out to attend social activities or build connections with others in game. In the early stages of a game release, establishing WOM and social interaction can enhance the connection among gamers.



Three actions to enhance mobile gamers' immersiveness



Connect to their interests

- Remain aware of emerging hobbies of target gamers, leverage these interests into both games and ads, to build an effective route to achieve gamer immersion.
- Utilize gameplay that gamers are familiar with for instant fun and enjoyment.
- In-game IP franchises allow gamers to be deeply immersed in the character's story.



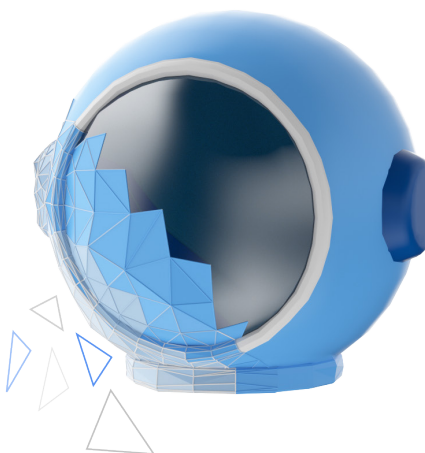
Offer them diverse game experiences

- Design the in-game mechanisms and onboarding tutorial to be both easy and clear, so that the learning effort required from gamers is decreased and they can sustain their initial motivation.
- Encourage gamers to discover and personalize their own gaming experience, by providing a range of varied and customized characters to choose from.



Enhance their belongingness to the game

- Enhance the features of guild battles, teamwork missions, and in-game friend gifting, to enable gamers to improve their relationships with each other and the game itself.
- Exclusive welcome-back gifts and missions entice back churned gamers by increasing their sense of belongingness.



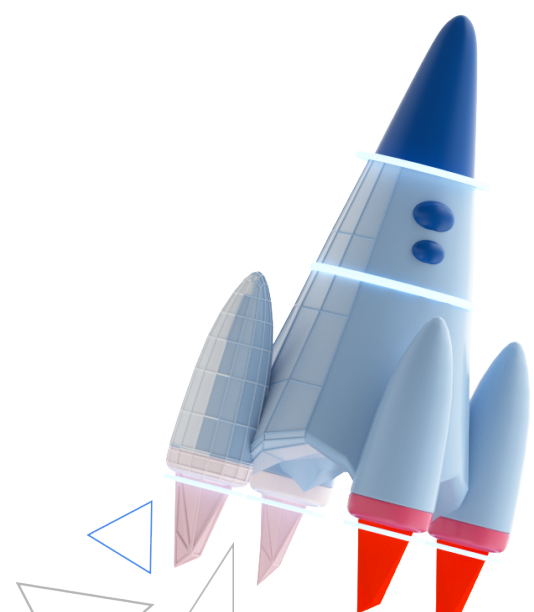
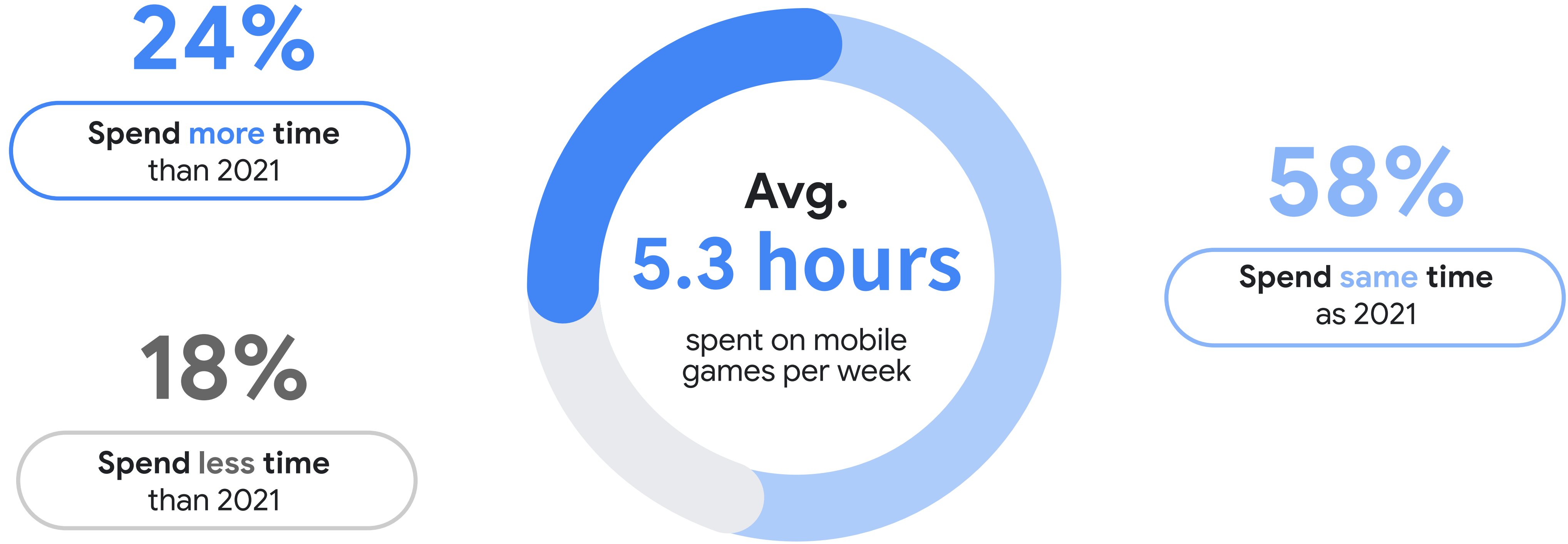
Chapter 1

How Mobile Gamers' Behaviors Shifted Under The Post Pandemic Situation



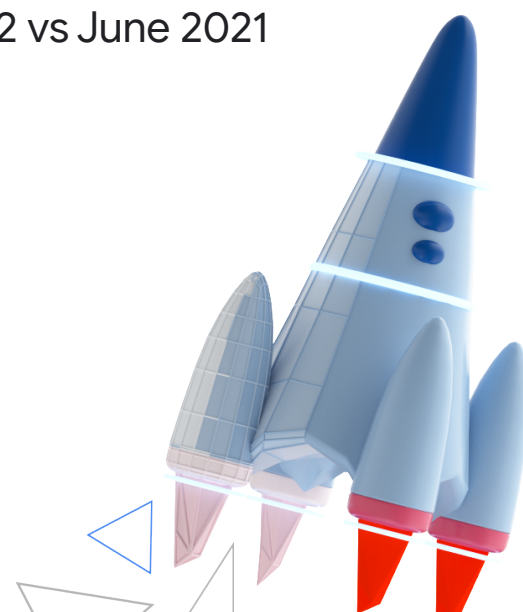
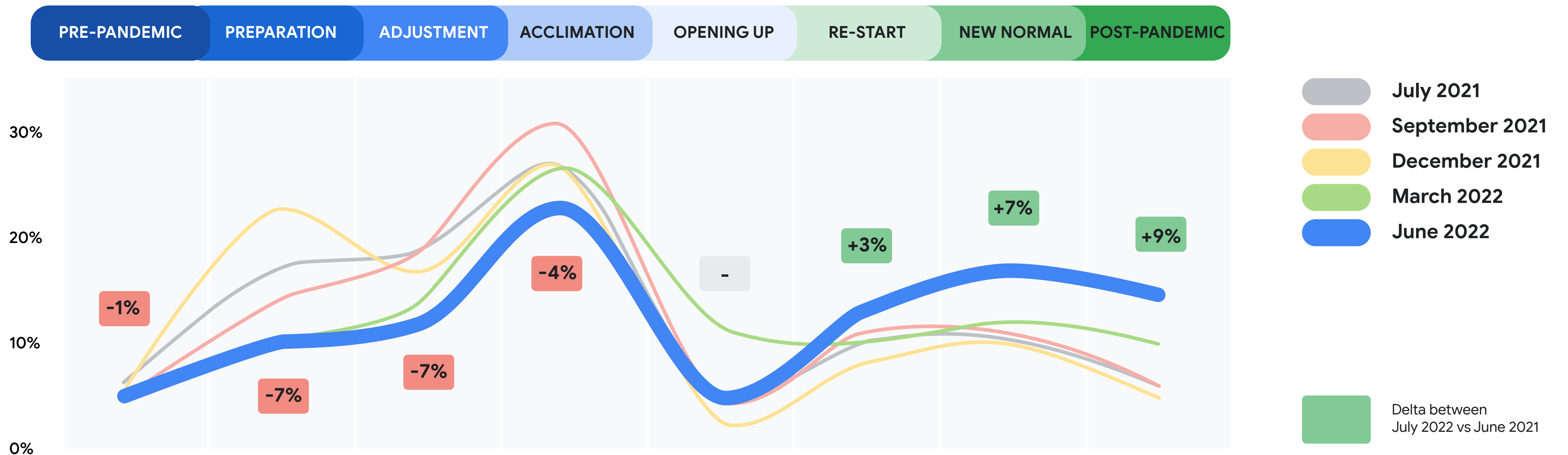
Despite the pandemic impact decreasing, the time spent on mobile gaming has been sustained

Compared with 1 Year Ago, Weekly Time Spent on Mobile Gaming



More and more consumers feel that the pandemic is behind them

“Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?”



3 major shifts have been observed amongst mobile gamers in the past year:

Mobile gamers generally spend more time on...

Investing

Watching movies/ dramas/ series on streaming platforms
Watching short videos
Listening to music

Shift 1

Laser-focused on spending smartly

‘More time’ mobile gamers also spend more time on...

Playing games on PC / Consoles

Shift 2

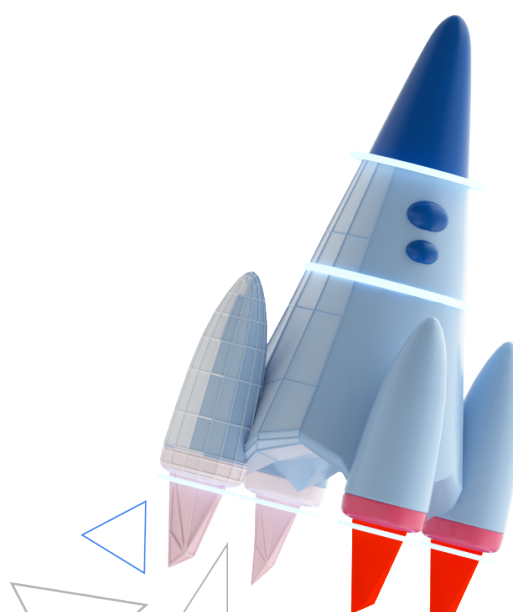
Demand for seamless cross-device gaming experiences

Same or less time gamers spend more time on...

**Attending social events
Participating in artistic / music events**

Shift 3

Reconnected with others via mobile gaming

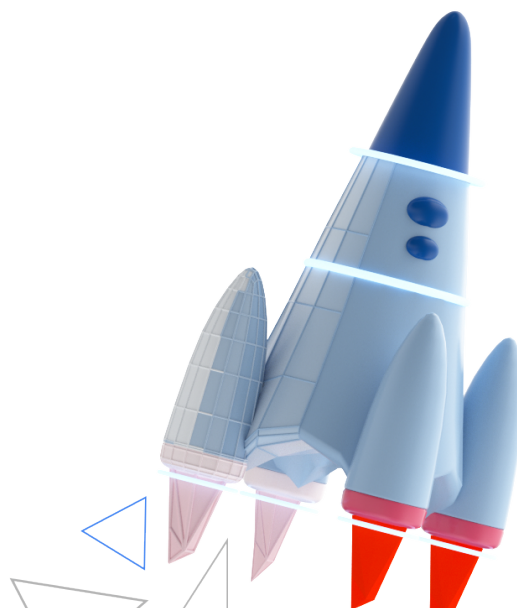


Shift 1

Laser-focused on spending smartly

“I wouldn't spend more on gaming packages with money now because I have two kids and **COVID really messed with our money situation.**”

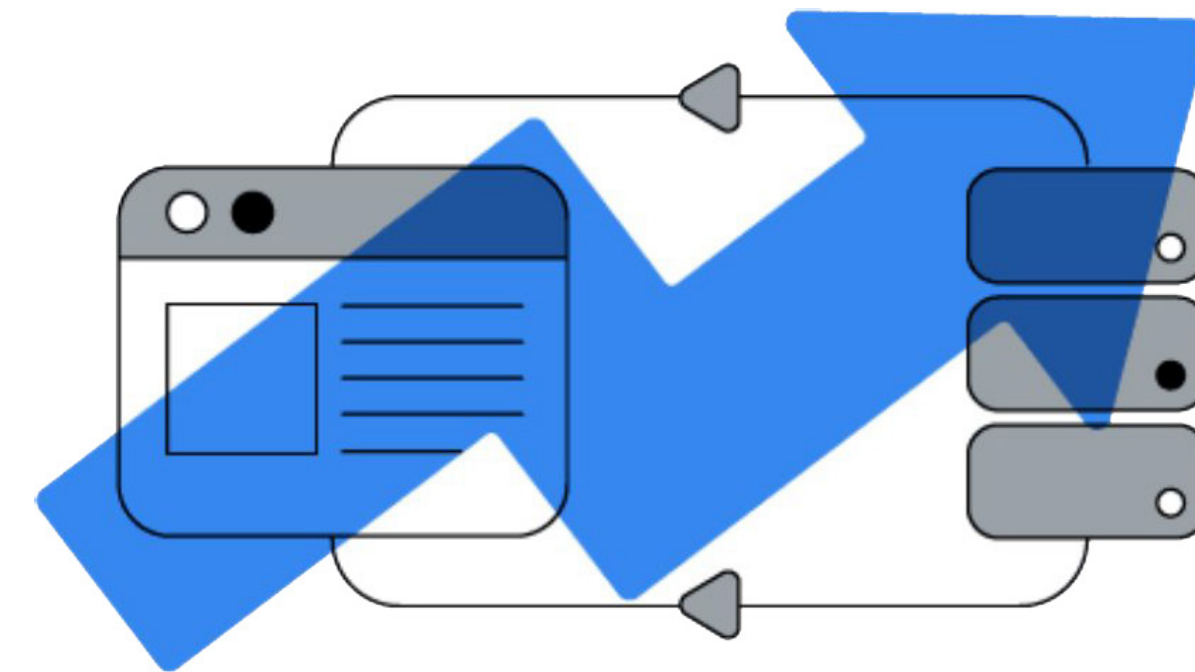
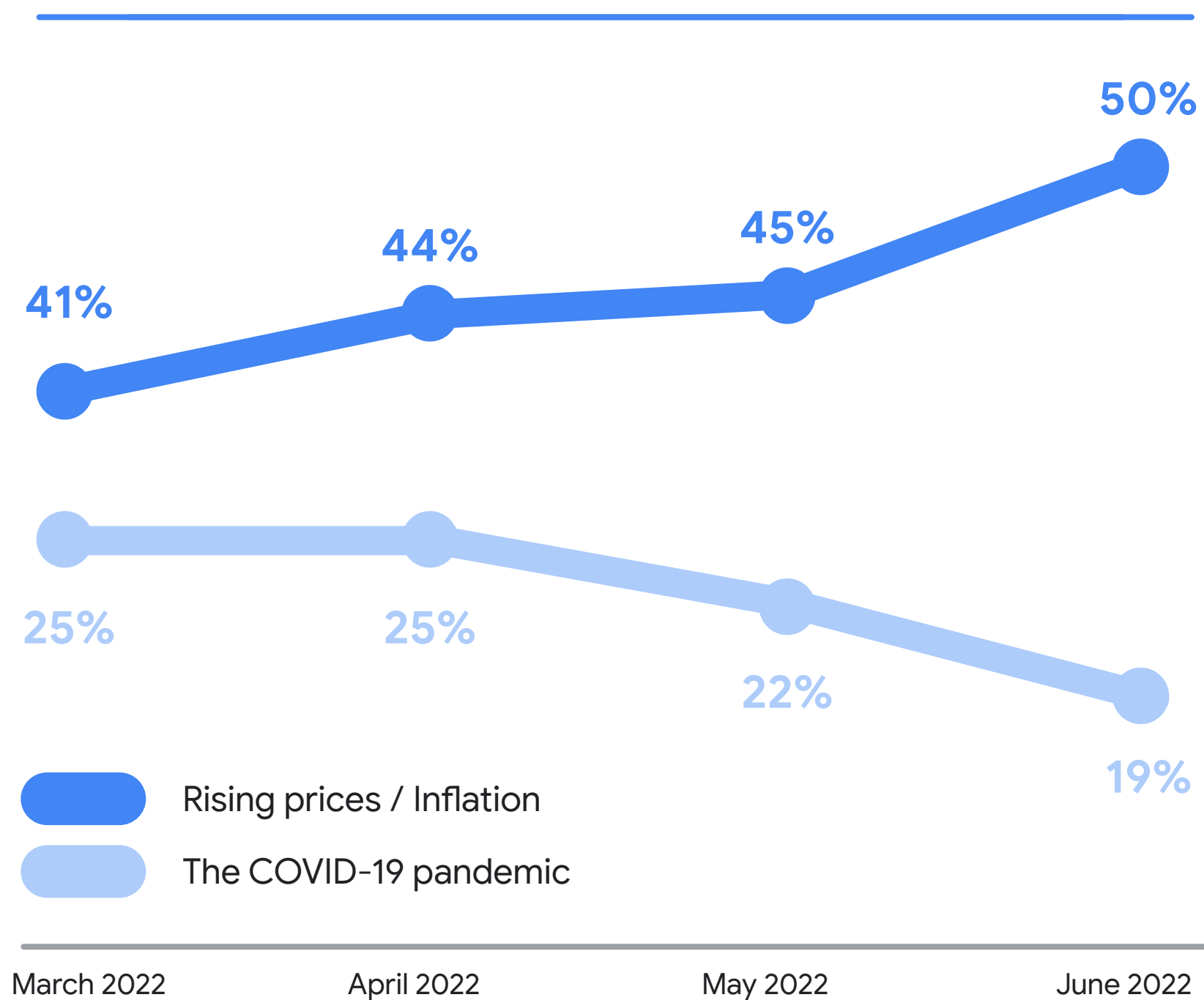
— USA, Female, Tycoon Experienced Gamer



Rising prices continue to be a growing concern, with people taking measures to spend smartly

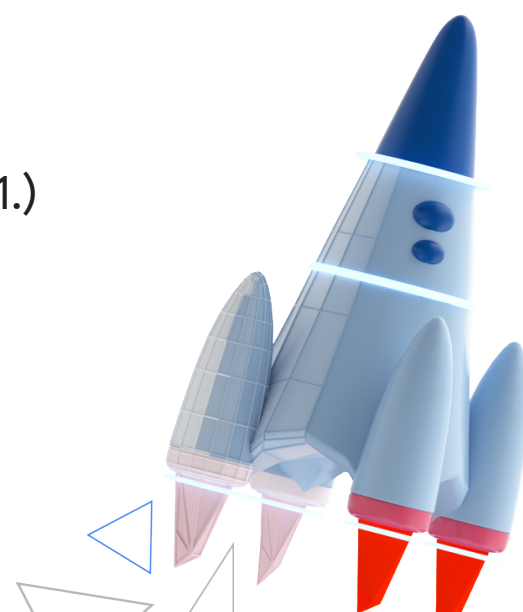
The concern on rising prices increased ~ 10% in the past quarter, this also reflected on consumers' higher demand to searching for great promotions

Which of the global challenges concern you the most?
(As 1st or 2nd concerns)



Searches for **promo code for existing user** have grown globally by over **100%** year over year

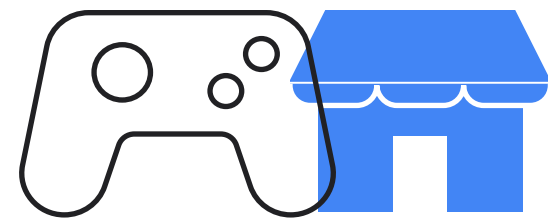
(Searching period: March 22, 2022–May 20, 2022 vs. March 22, 2021–May 20, 2021.)



Mobile gamers pay attention to high value as well as high quality

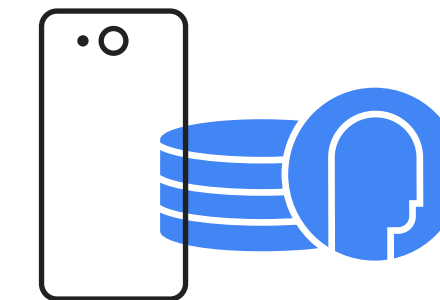
In-game promotion is the main spending trigger of mobile gamers.

To manage their finances, they are more likely to spend more for higher quality content, especially for South Korean gamers.



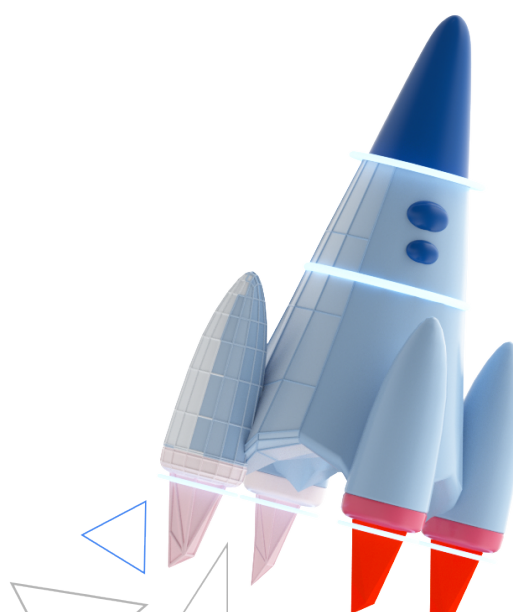
Top 5 Spend Triggers

- 1 **Pay-to-purchase items were great value**
- 2 **Special promotions attracted**
- 3 Unlock new playable content
- 4 Complete difficult levels/missions
- 5 Personalize characters/items I build



Growing Spend Triggers

- 1 **Support a game that is good**
- 2 Not spend time repeating same tasks
- 3 Encouraged by friends playing together to spend
- 4 Invite more friends to play together
- 5 Paying is an alternative to asking others to help



Spenders from the USA and Japan are more likely to prefer receiving free rewards from watching in-game ads

“Looking forward for free rewards from in-game ads”
(Spender vs Non-spender)

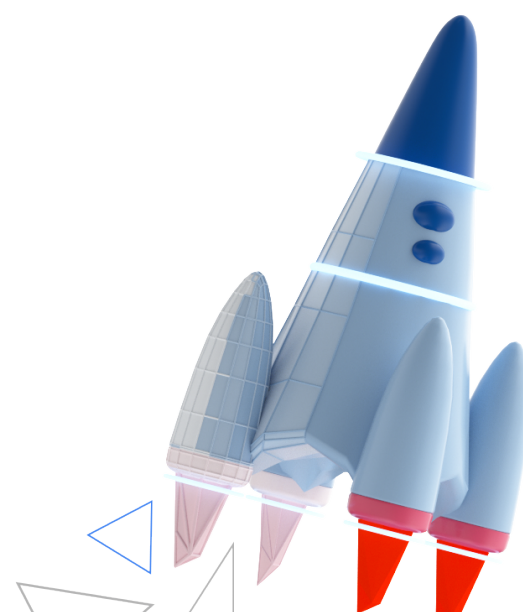
	USA	Japan	Germany	South Korea	Brazil	Indonesia
Index*	1.3x	1.2x	1.1x	1.0x	1.0x	1.0x

“It will be worth it to watch a rewarded ad if I can gain any progress. So, like new adventures, new clothing, get a new life on this or just stuff that help better the game.”

— USA, Female, Tycoon New Gamer

* Index: Compare the percentage of spender and non-spender to show the significance of spender on that topic

Google / Ipsos, 2022 The Shifting Needs of Global Mobile Gamers USA / Japan / Germany / South Korea / Brazil / Indonesia, 2022 April
Q. Overall, how do you usually feel when seeing in-game ads? Base: 16-54 yo General mobile gamers; Spender n=2527, non-spender n=3473

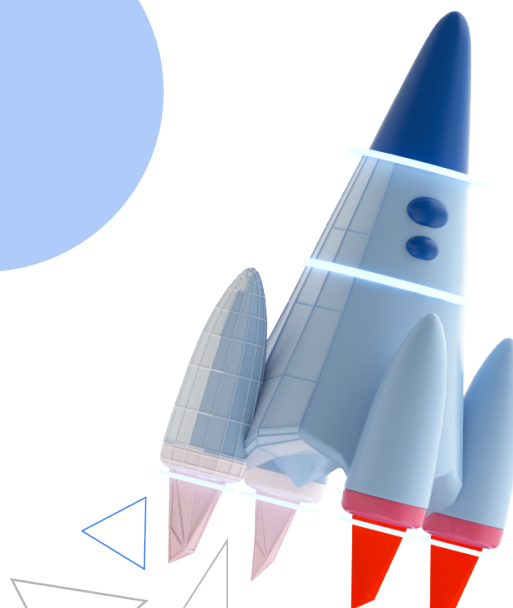


Shift 2

Demand for seamless cross-device gaming experiences

“I feel like mobile games have come a long way with graphics, so I applaud them for that, but they have not come a long way with music and sound effects. I feel like they should do better in that regard.”

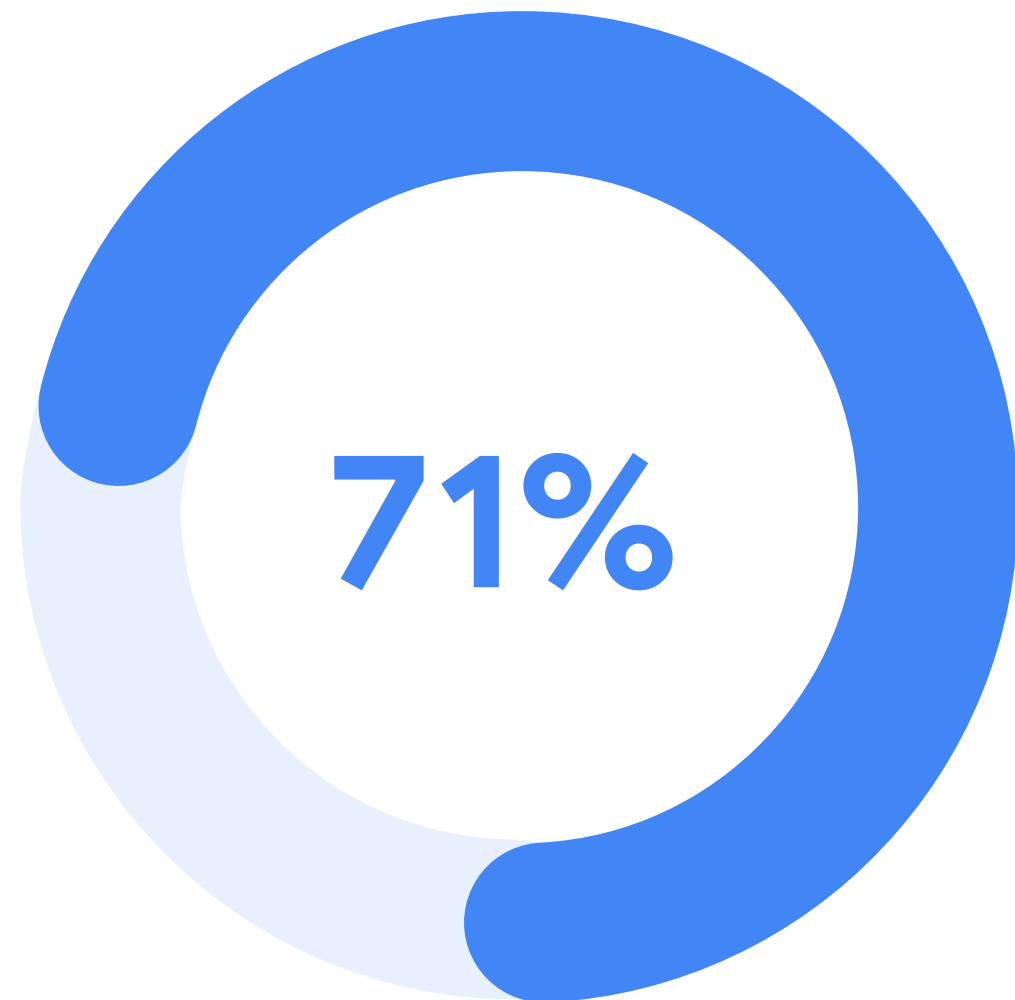
— USA, Male, 4X SLG Experienced Gamer



7-in-10 mobile gamers are playing games on more than one gaming device

South Korean and Indonesian mobile gamers are highly overlapped with PC gamers

Different Gaming Devices Mobile Gamers Play Games on



of mobile gamers
play on more than one
gaming device

USA	
Smartphone Only	25%
PlayStation	35%
Tablet	26%
PC	24%

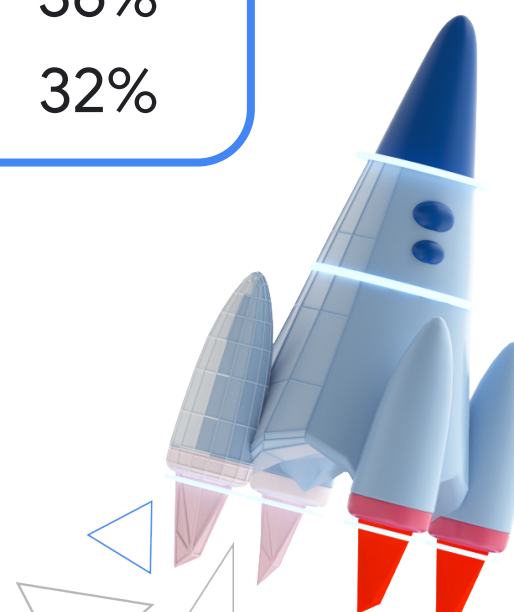
Japan	
Smartphone Only	32%
Nintendo Switch	36%
PlayStation	30%
PC	23%

Germany	
Smartphone Only	26%
PlayStation	36%
PC	30%
Tablet	23%

South Korea	
Smartphone Only	37%
PC	35%
Tablet	23%
Emulators on PC	19%

Brazil	
Smartphone Only	27%
PlayStation	34%
Tablet	26%
PC	26%

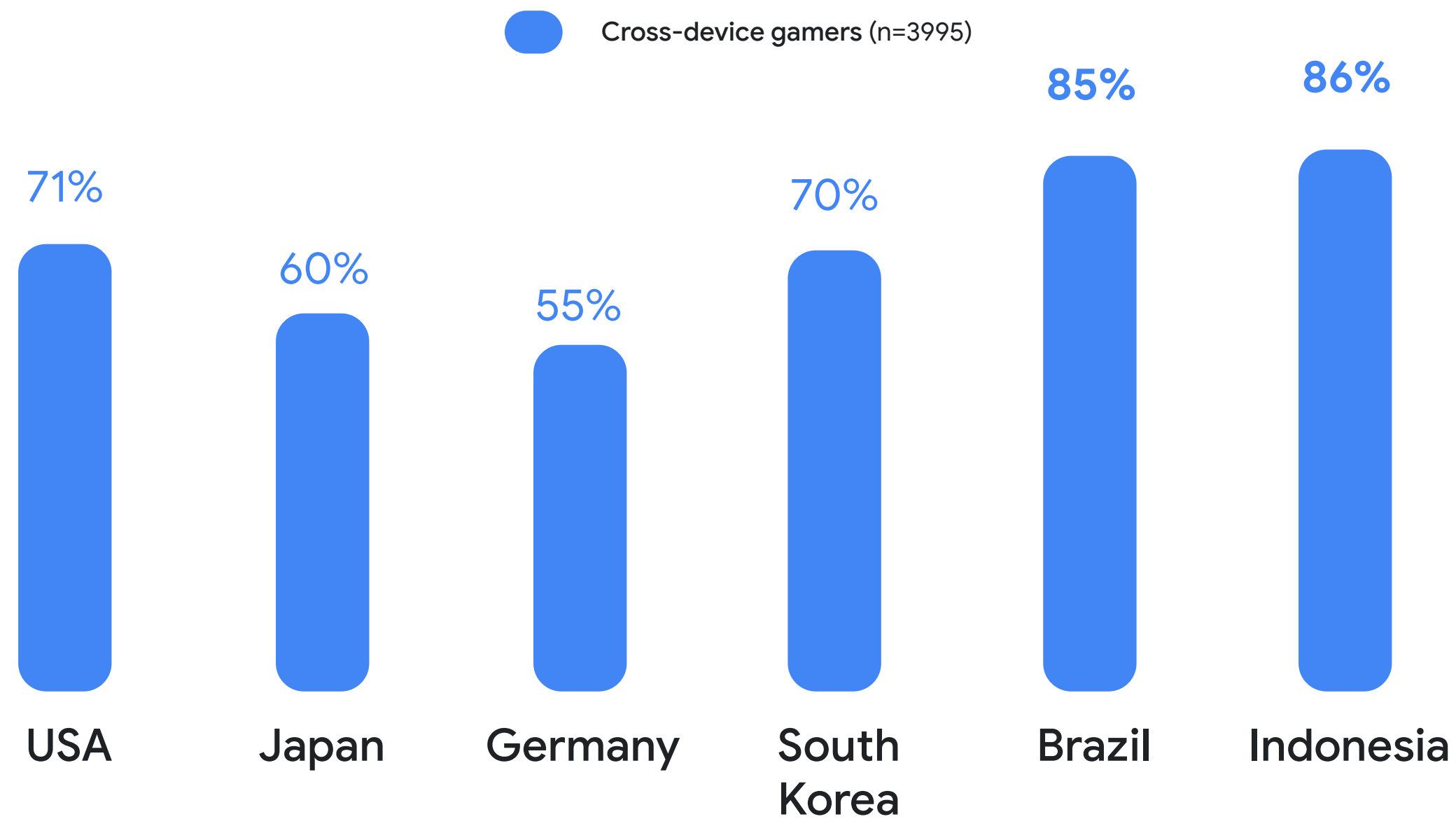
Indonesia	
Smartphone Only	26%
PC	45%
PlayStation	36%
Emulators on PC	32%



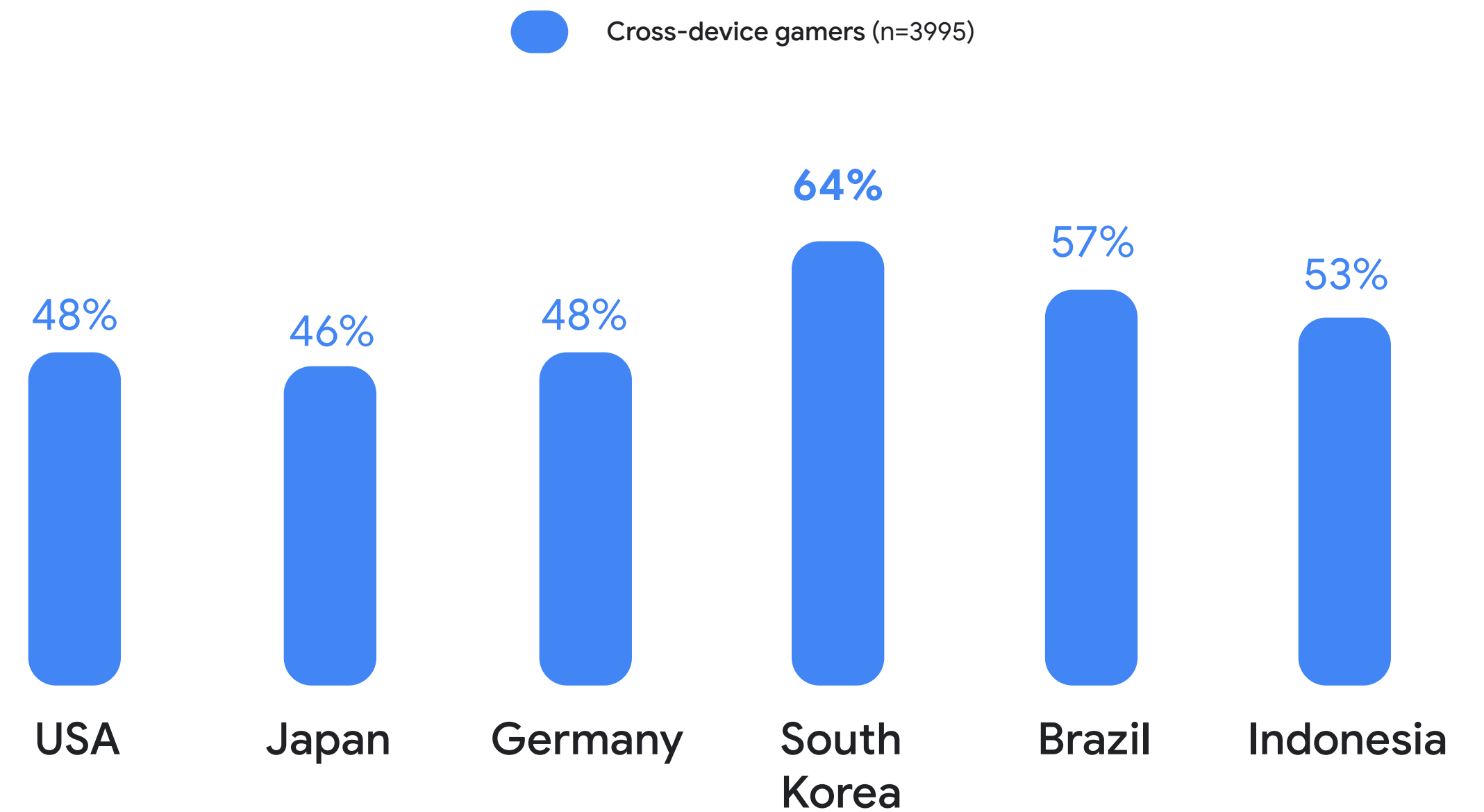
The majority of cross-device gamers are open to a new PC game that originated from mobile. More than half of gamers expect a seamless gaming experience

South Korean gamers are more experienced on cross-device gaming and therefore have higher expectations of a seamless gaming experience

If the current mobile game you are playing is developed as a PC or console game, would you download or purchase it?



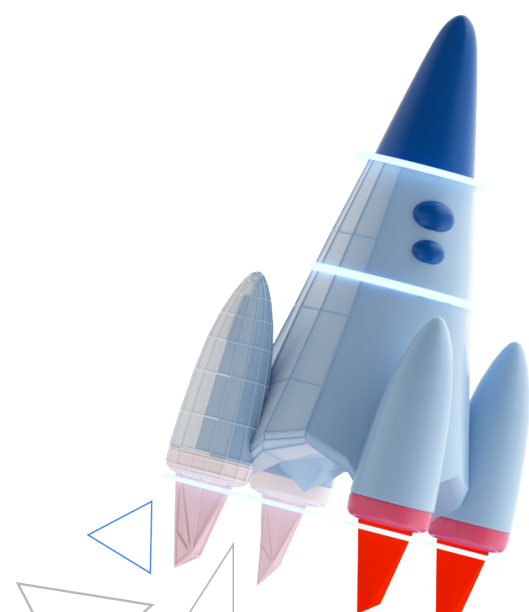
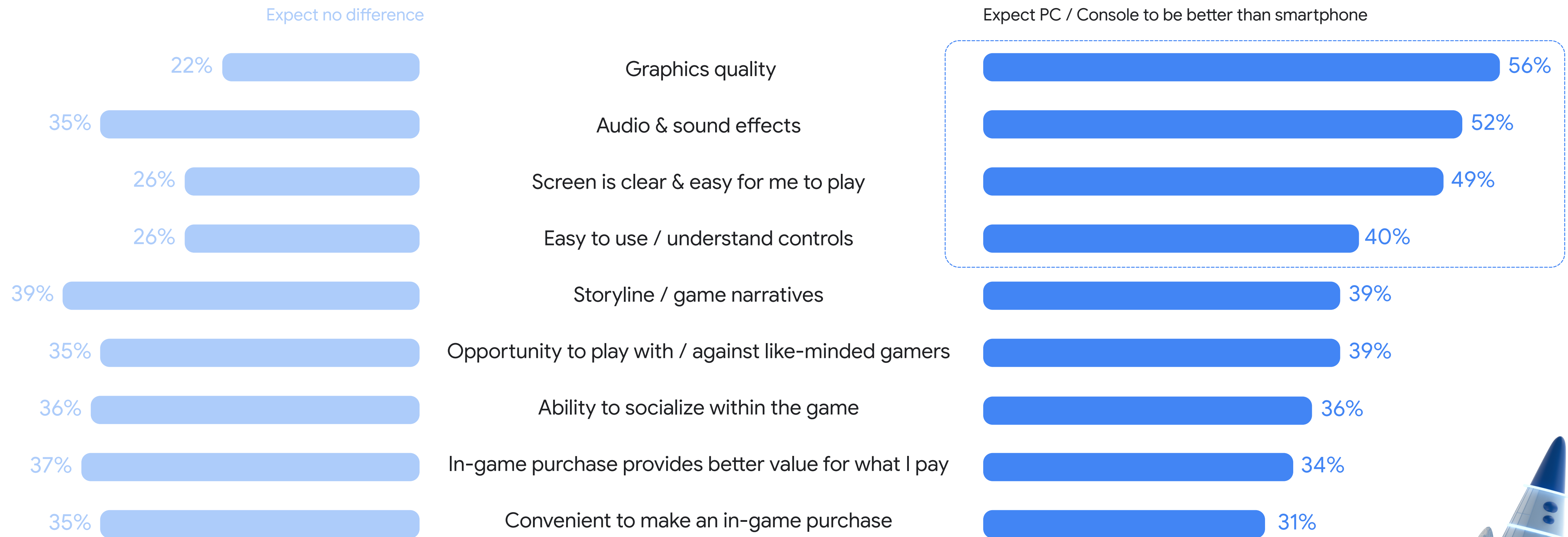
“I prefer the exact same game to be available on all platforms (mobile, PC & console) with seamless integration across all devices”



Device adaptation is the main requirement to ensure a smooth cross-device gaming experience

Cross-device gamers expect to have a better quality of graphic, sound effects, and control mechanisms.

Cross-Device Gamers' Gaming Quality Expectations on Smartphone vs PC/Console



Shift 3

Reconnected
with others via
mobile gaming

“I’ve actually made some online friends through playing games, but mostly it’s people I’ll send in-game gifts back and forth too that I went to high school with that I haven’t spoken to since then.”

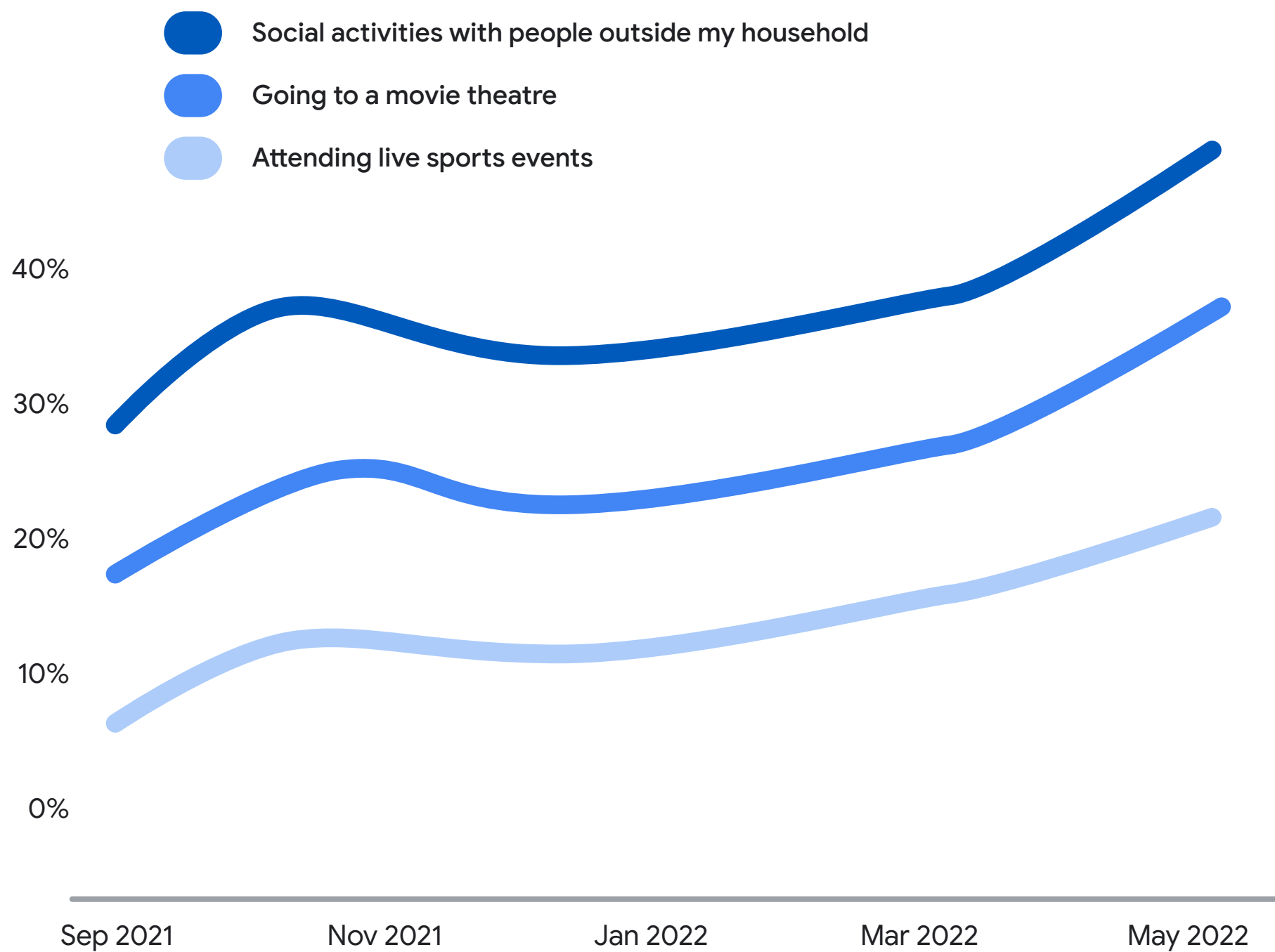
— USA, Female, Merge New Gamer



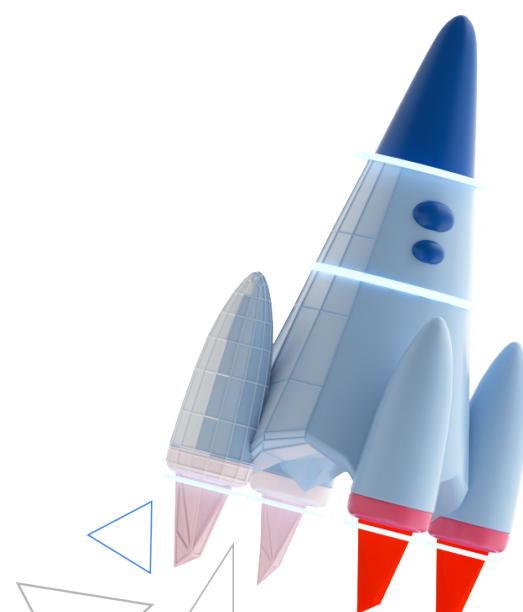
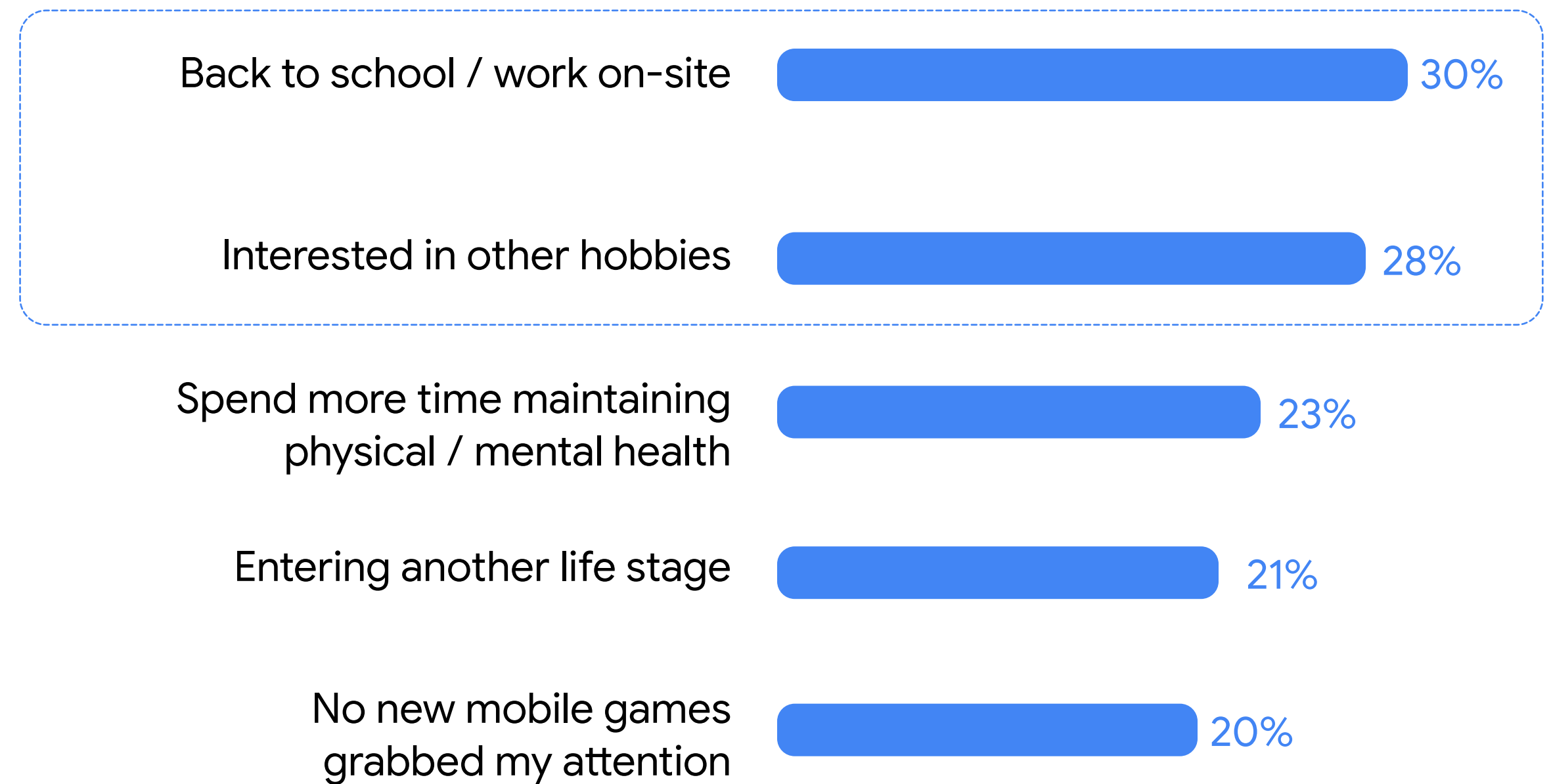
Social and entertainment activities have made a clear comeback in the past 6 months

Top reasons for gamers to spend less time on mobile games revolve around people's reconnection, such as back to work and interested in other hobbies

Participation in Social and Entertainment Activities

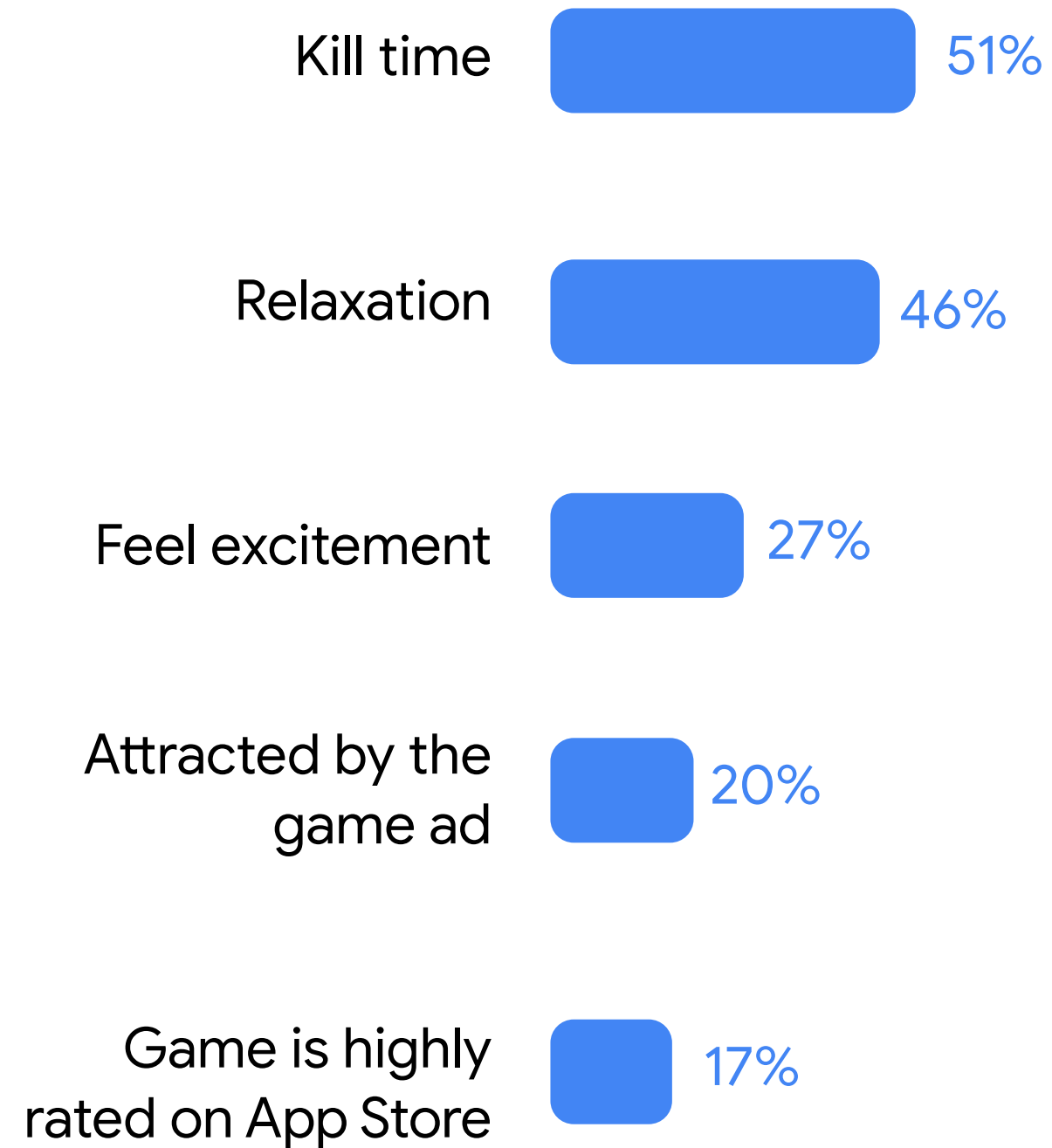


Top 5 Reasons to Play **Less** Time on Mobile Gaming

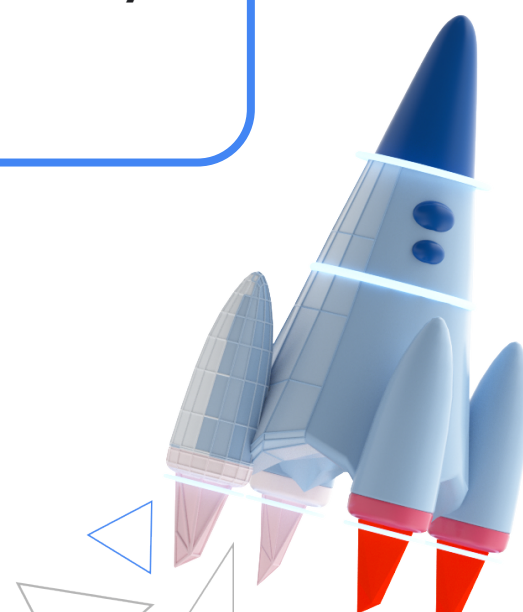
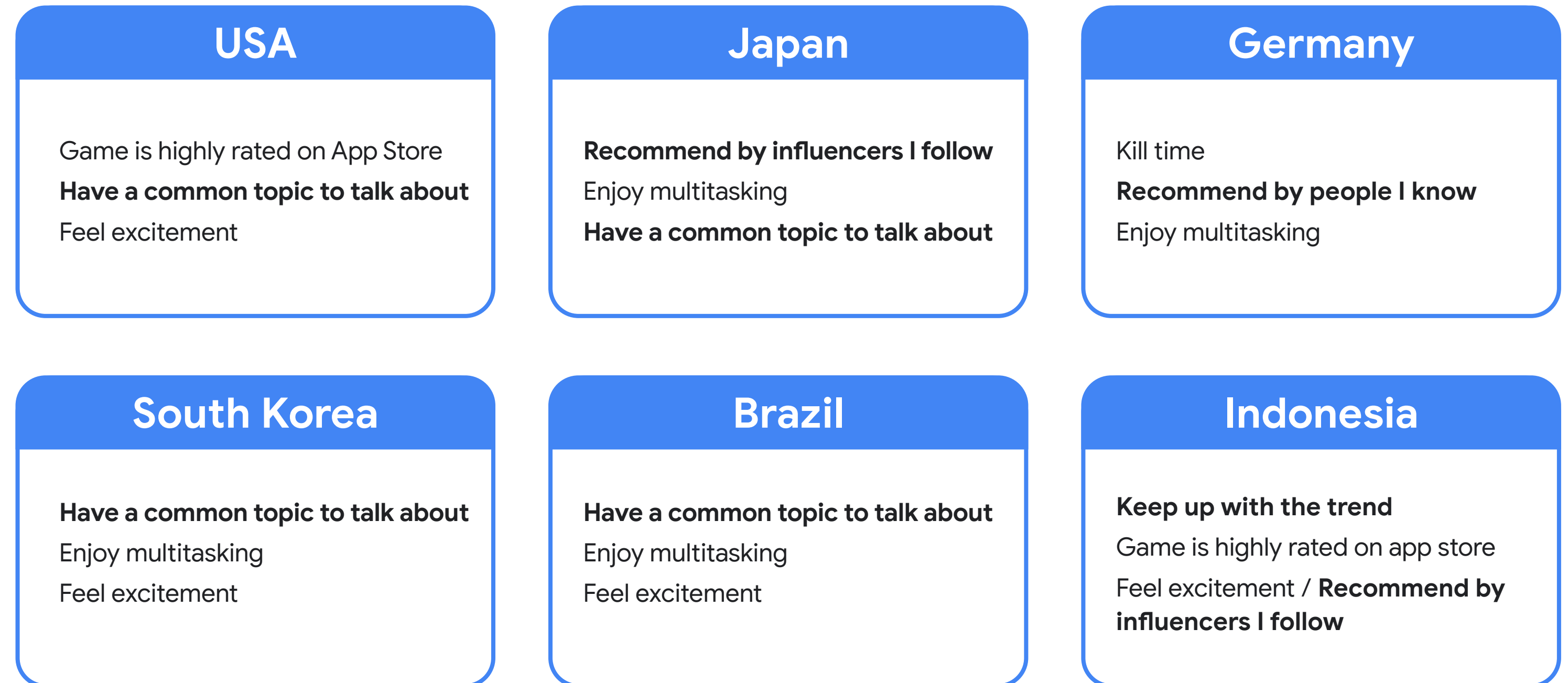


Lean-back triggers remain key for gamers, but more gamers continue playing games for their social needs

Top 5 Mobile Gaming Triggers



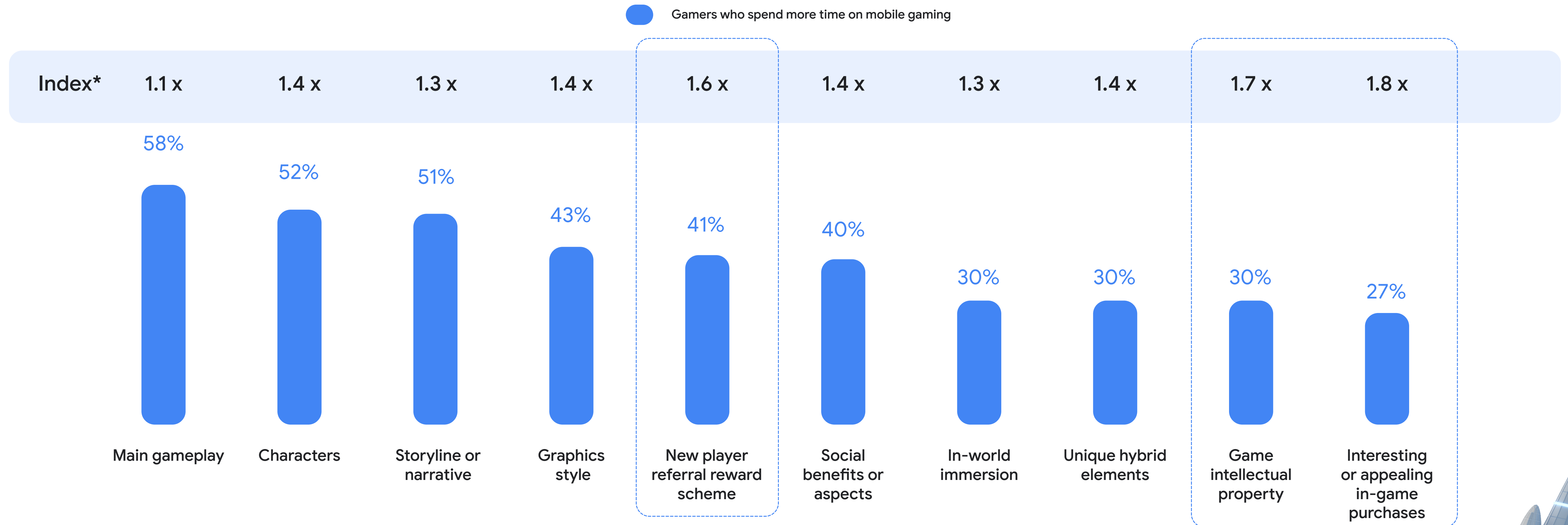
Top 3 Gaming Triggers That Are Stronger than Last Year



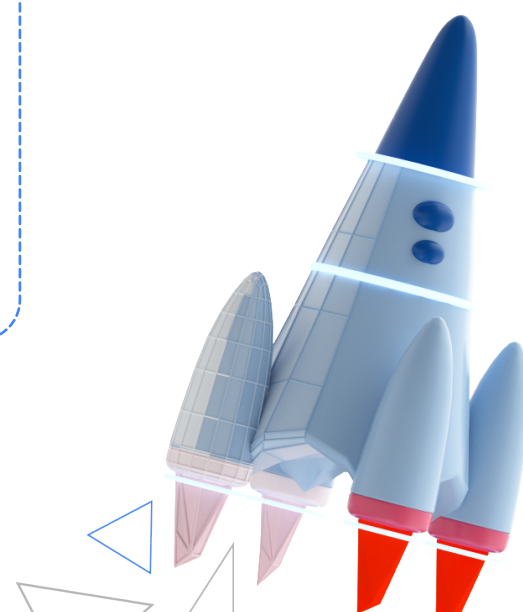
Main content of the game such as gameplay, characters and storyline are top sharing topics

More-time gamers are more likely to pay attention on appealing in-game purchase offers, the new player referral reward and the game IP

WOM Topics when Learning about New Mobile Games



* Index: Compare the percentage of **more-time gamer** and same or less time gamer to show the significance of more-time gamer on that topic



Chapter 2

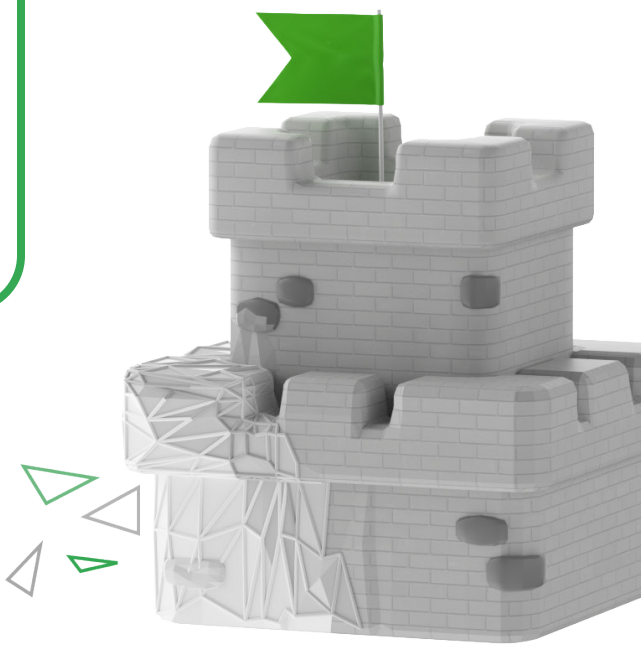
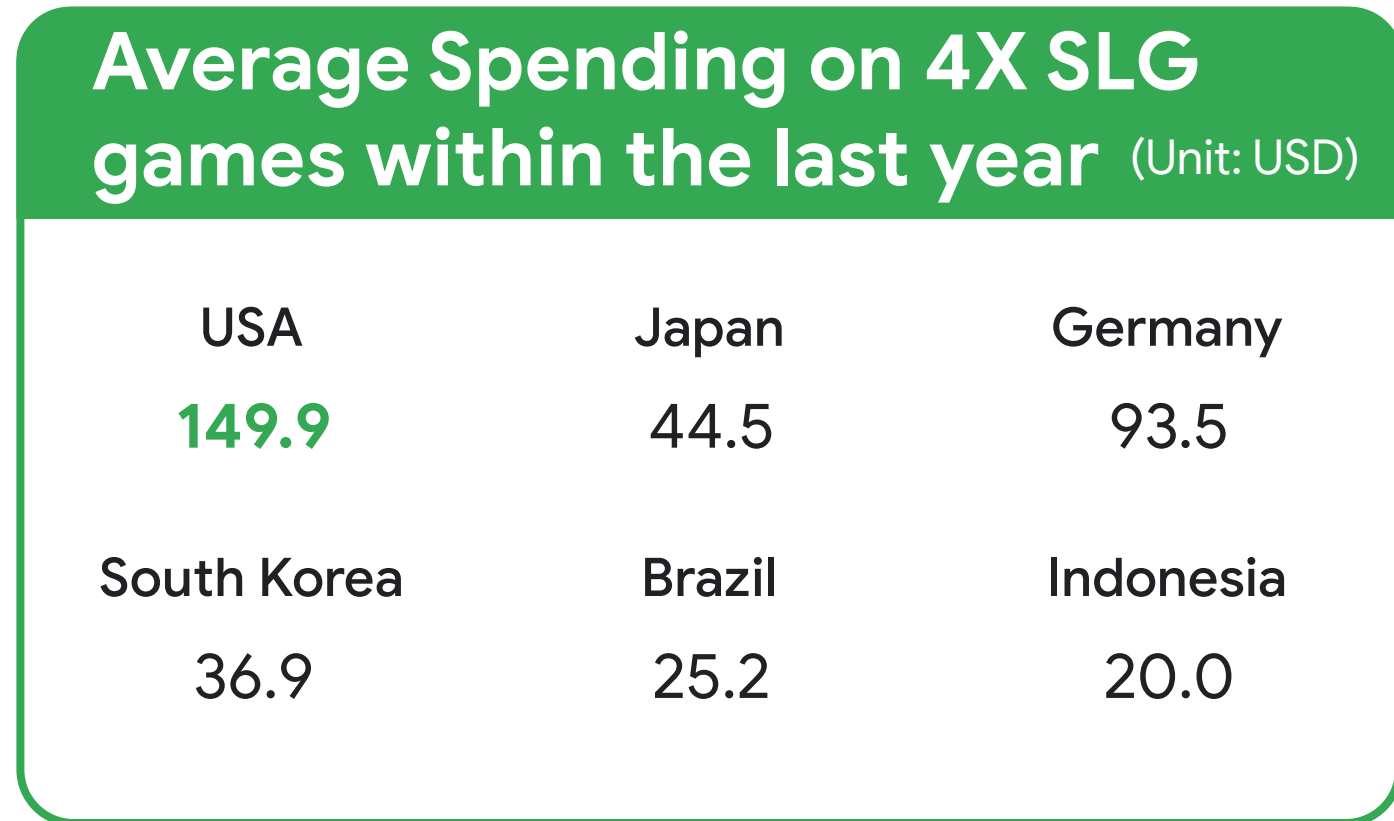
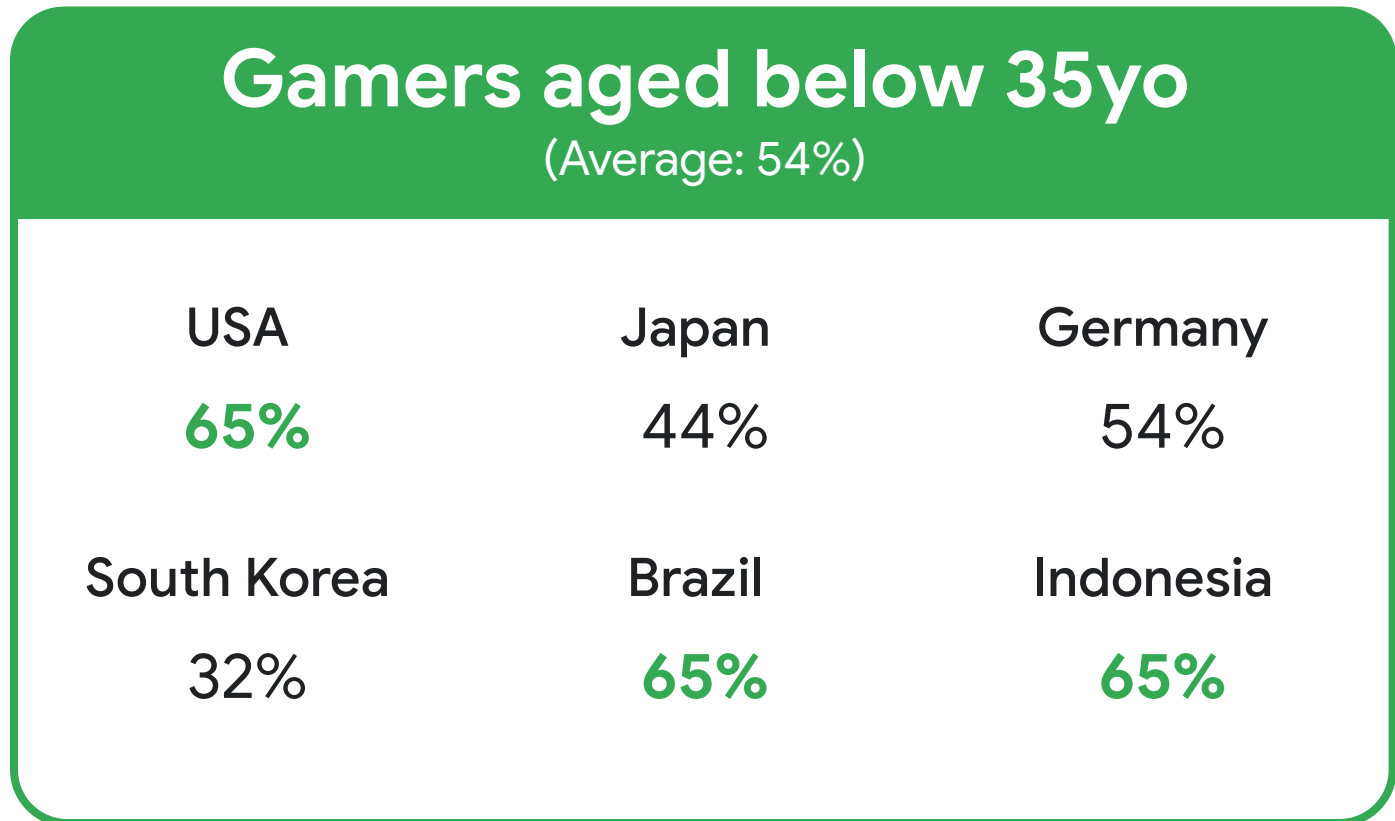
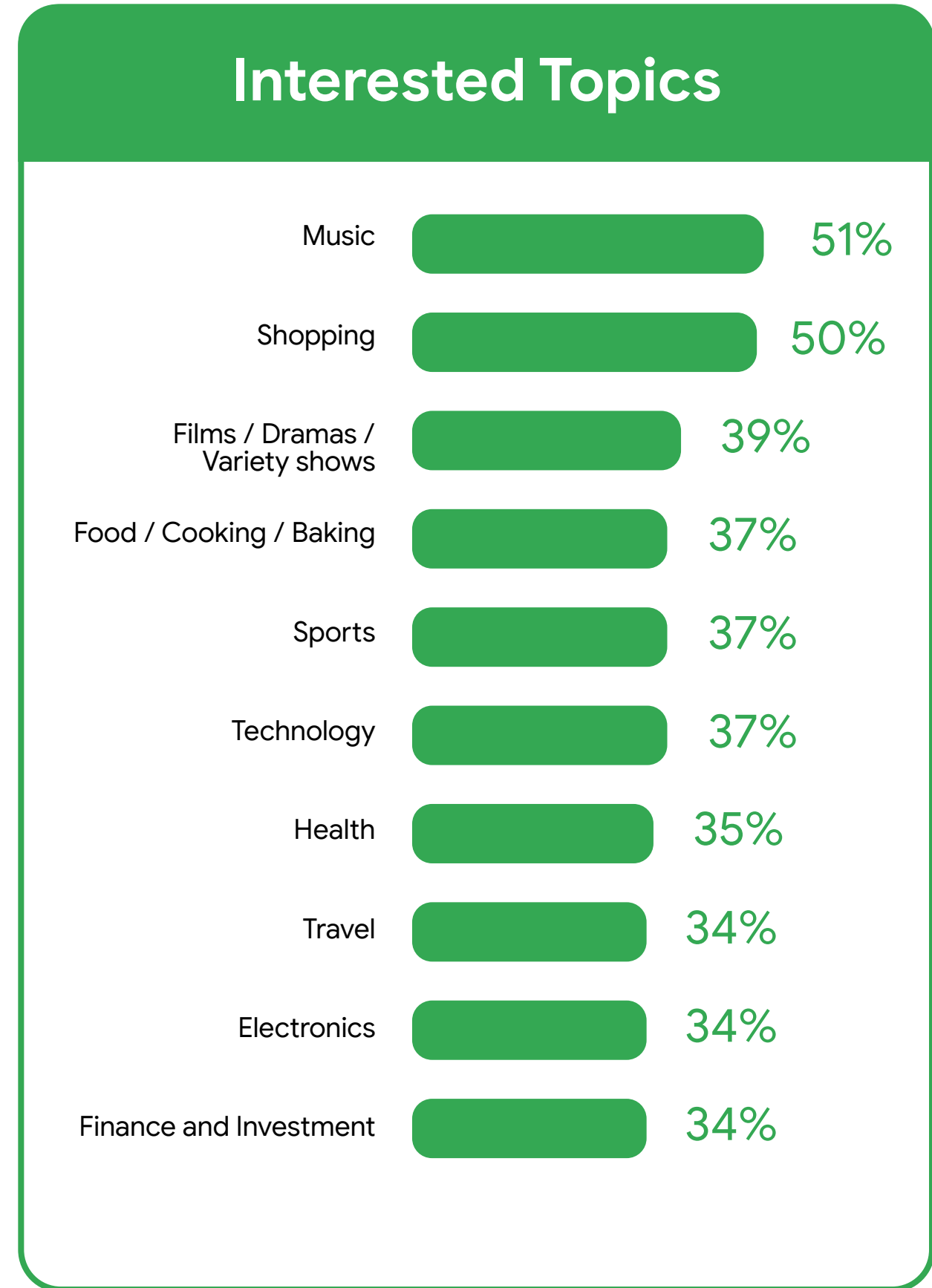
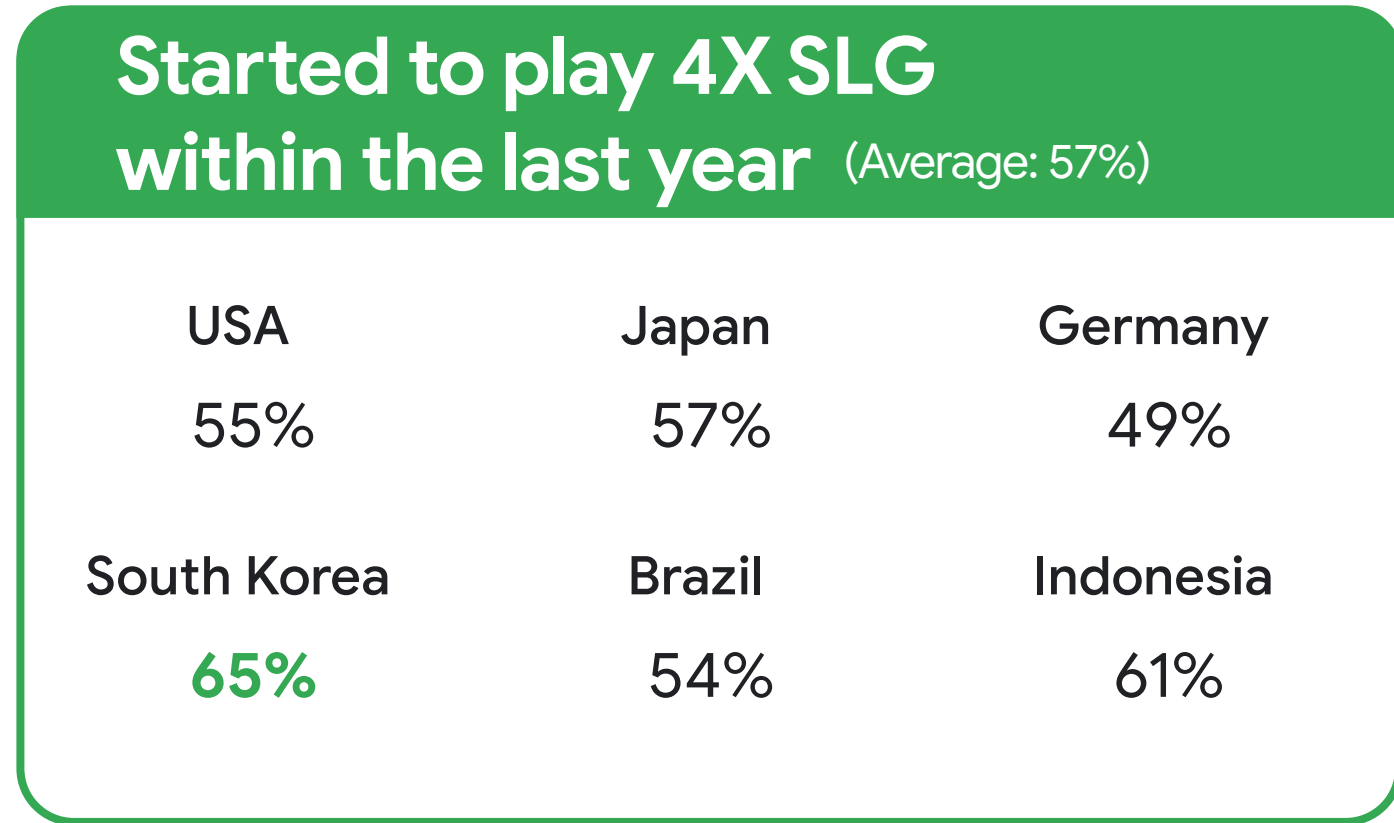
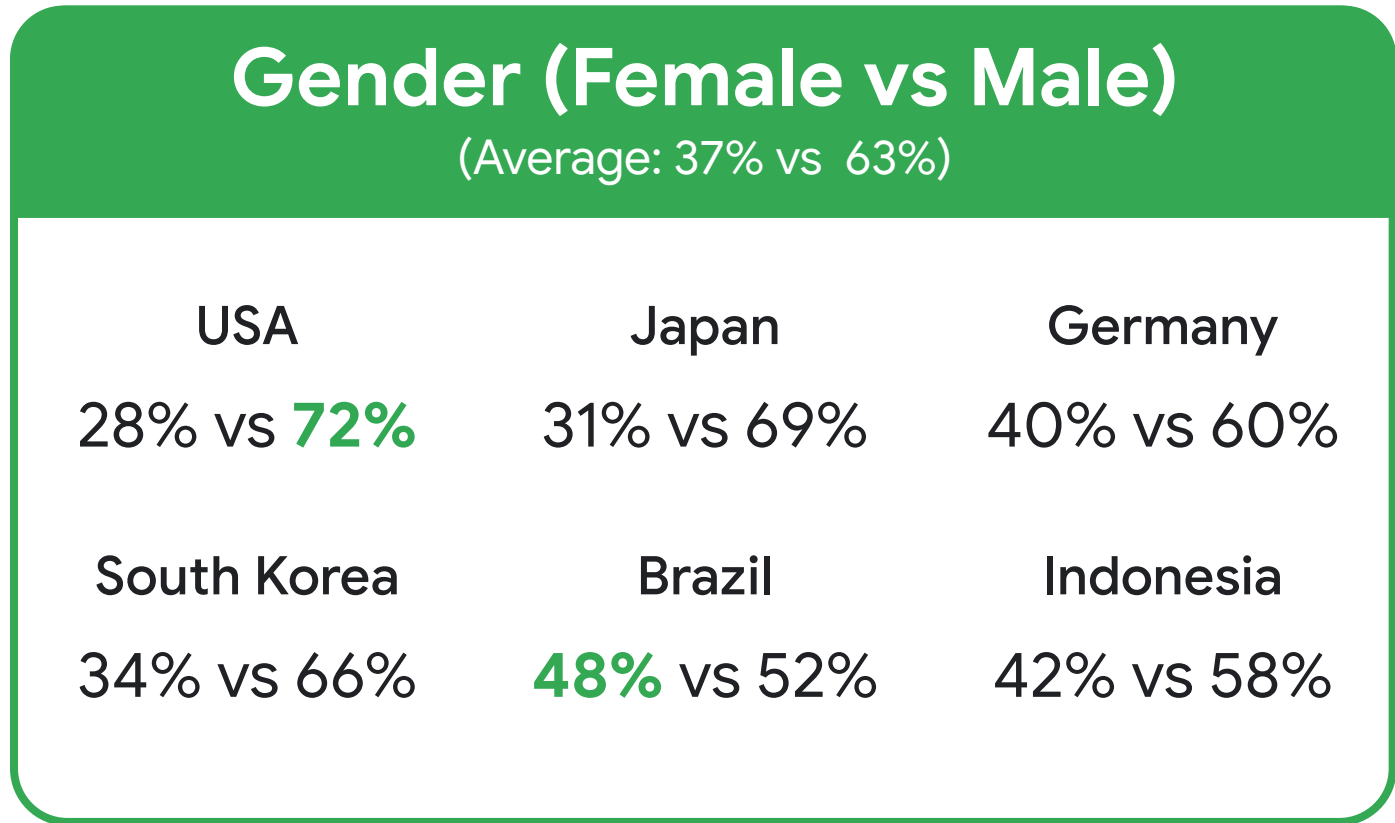
How To Achieve
Mobile Gamer
Immersiveness



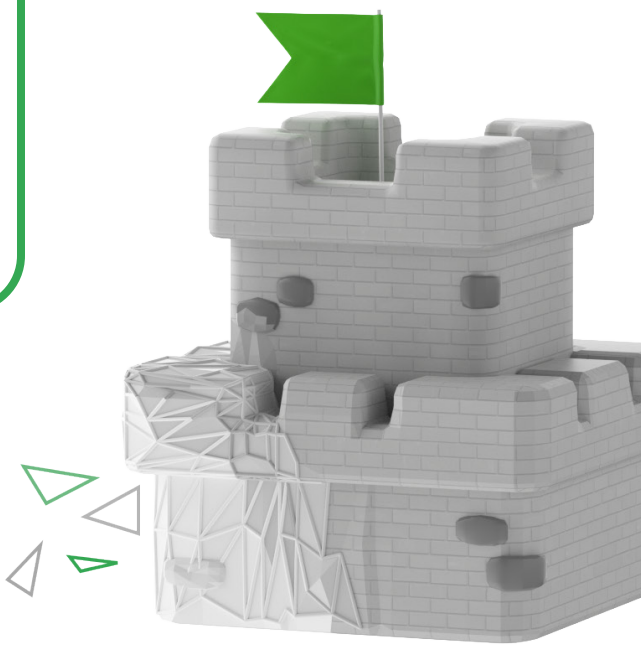
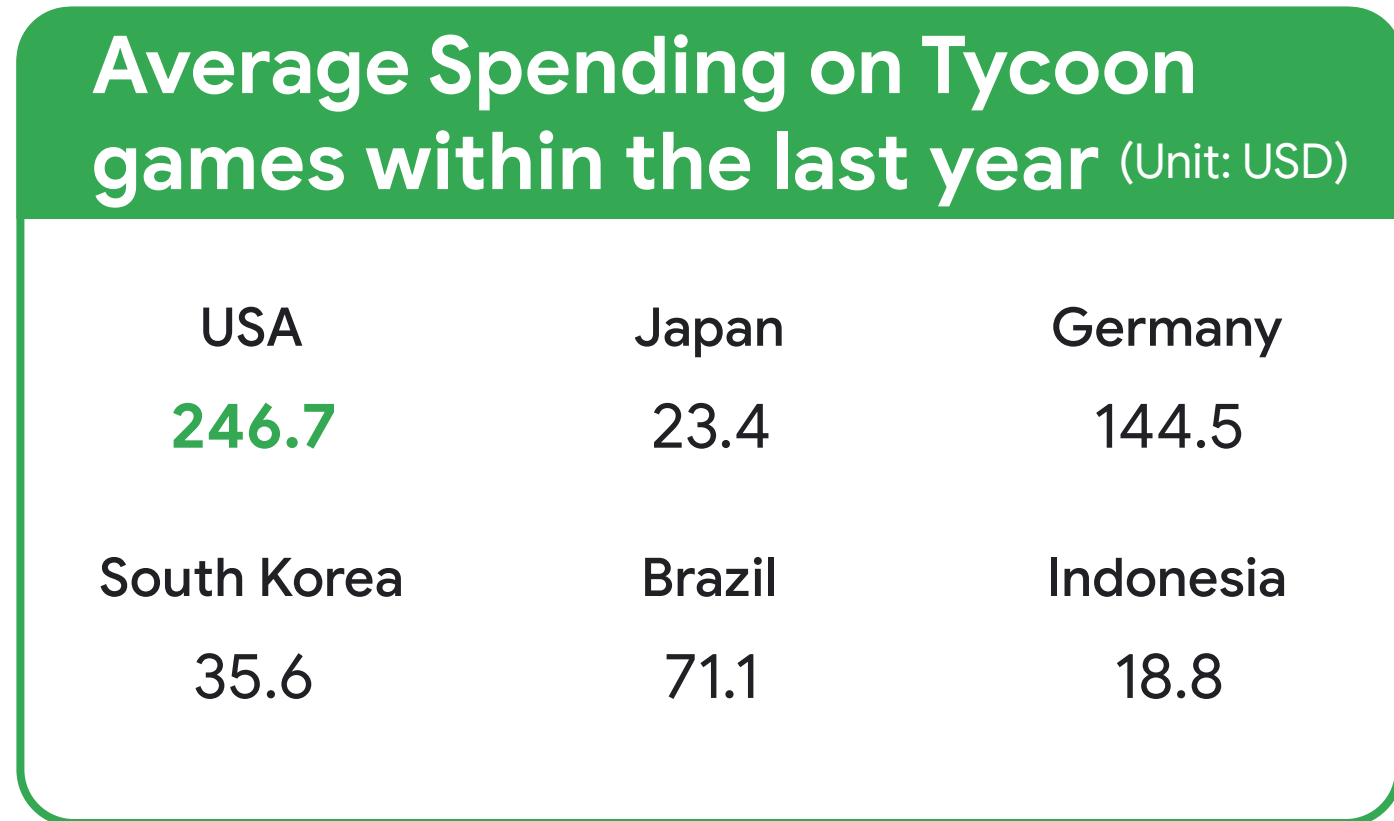
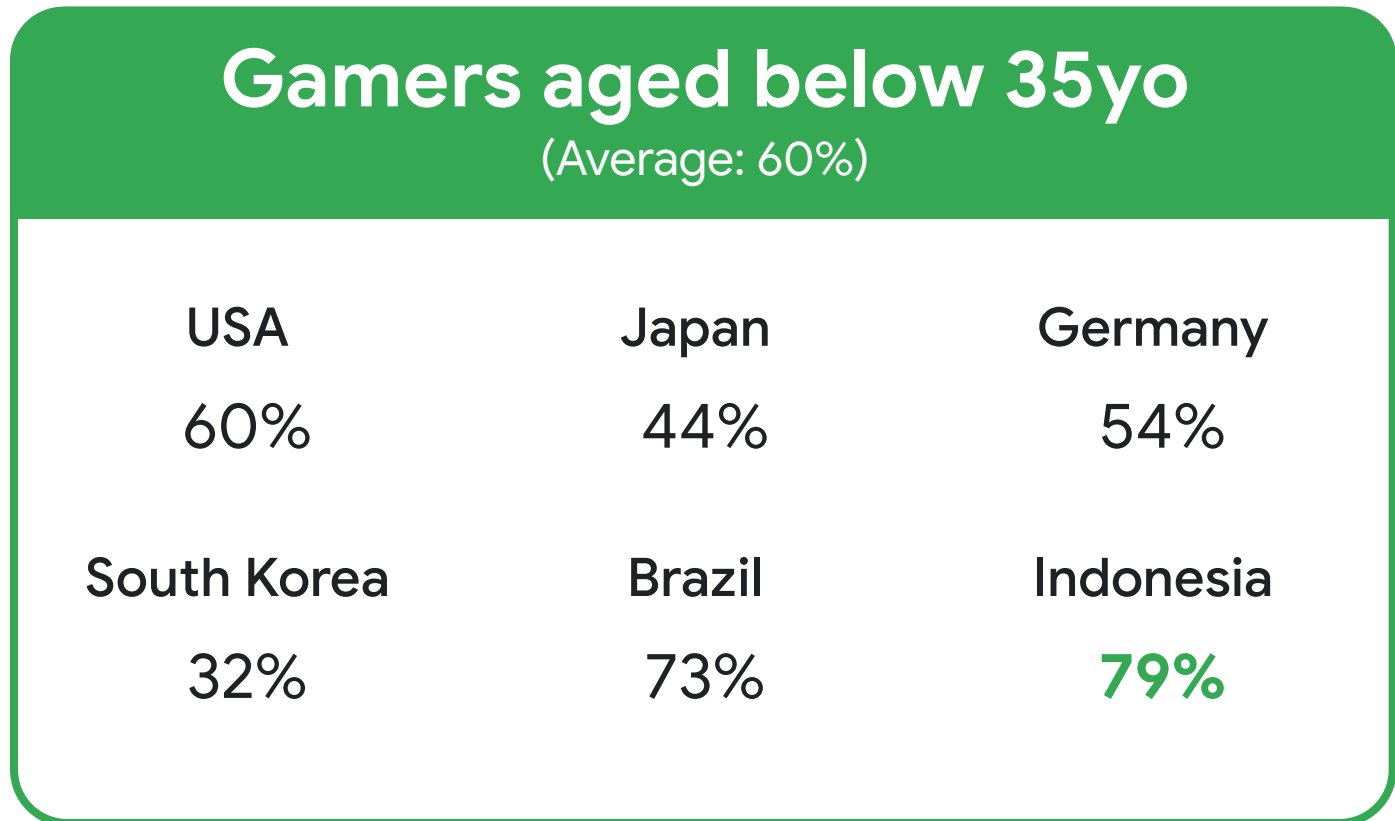
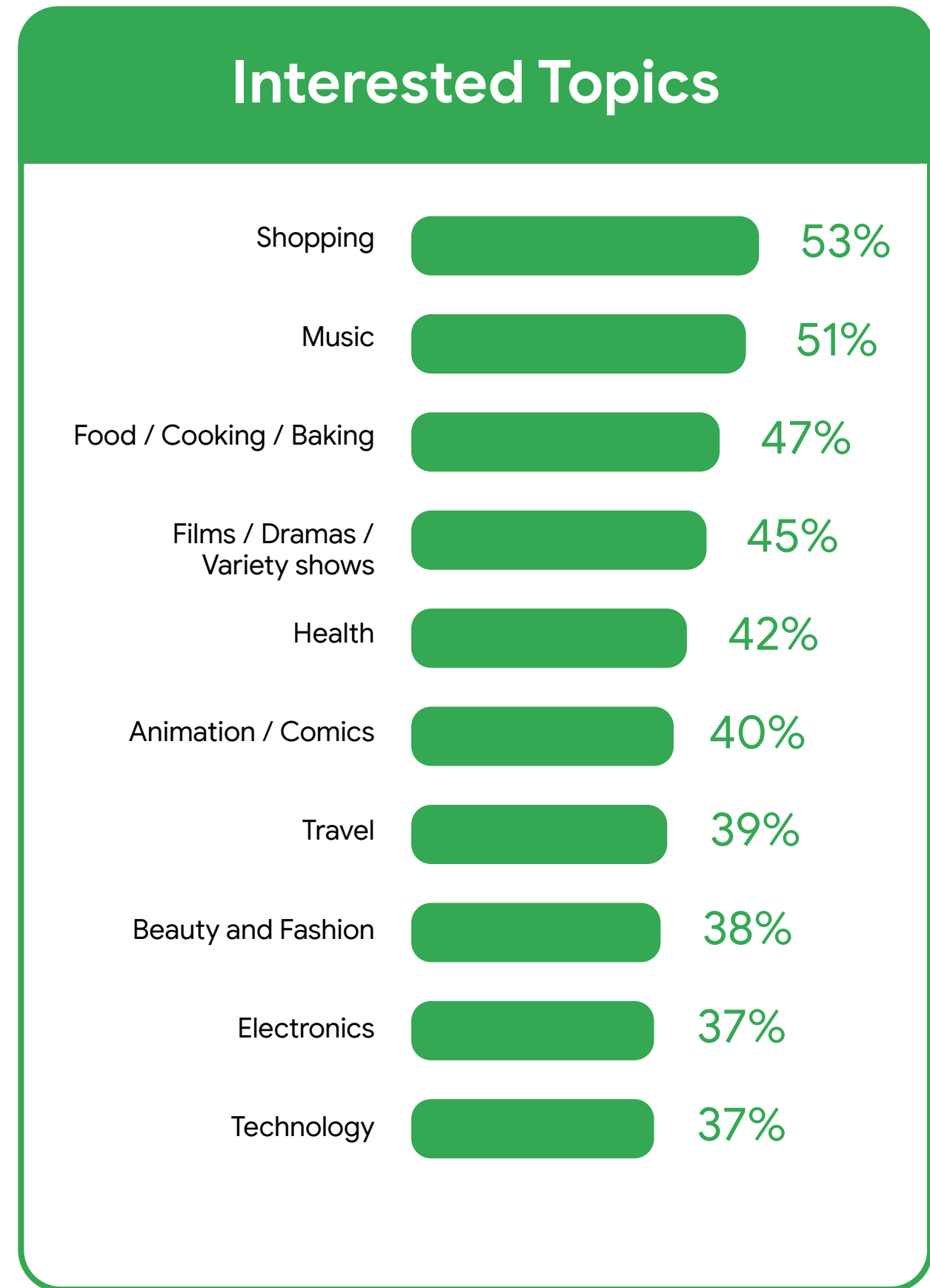
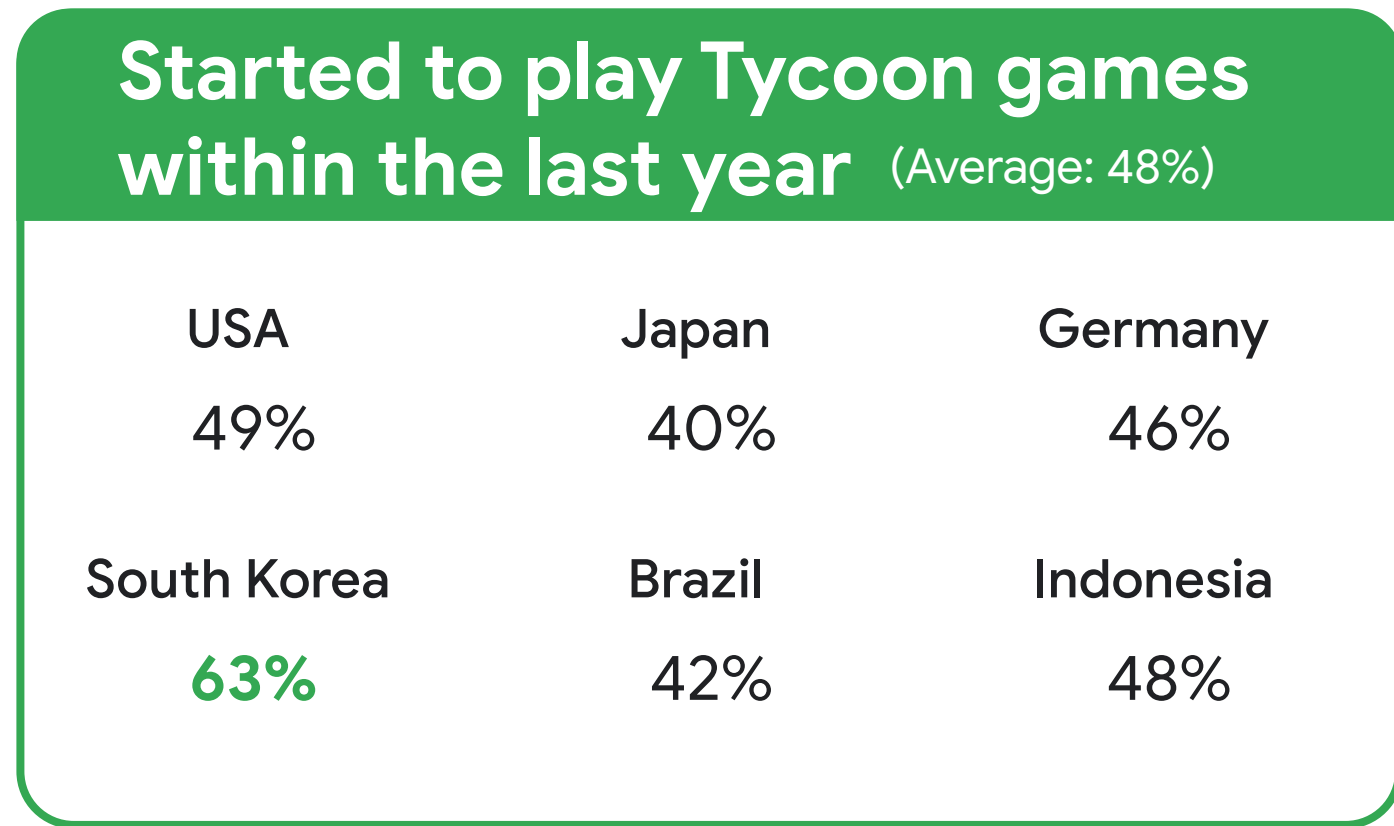
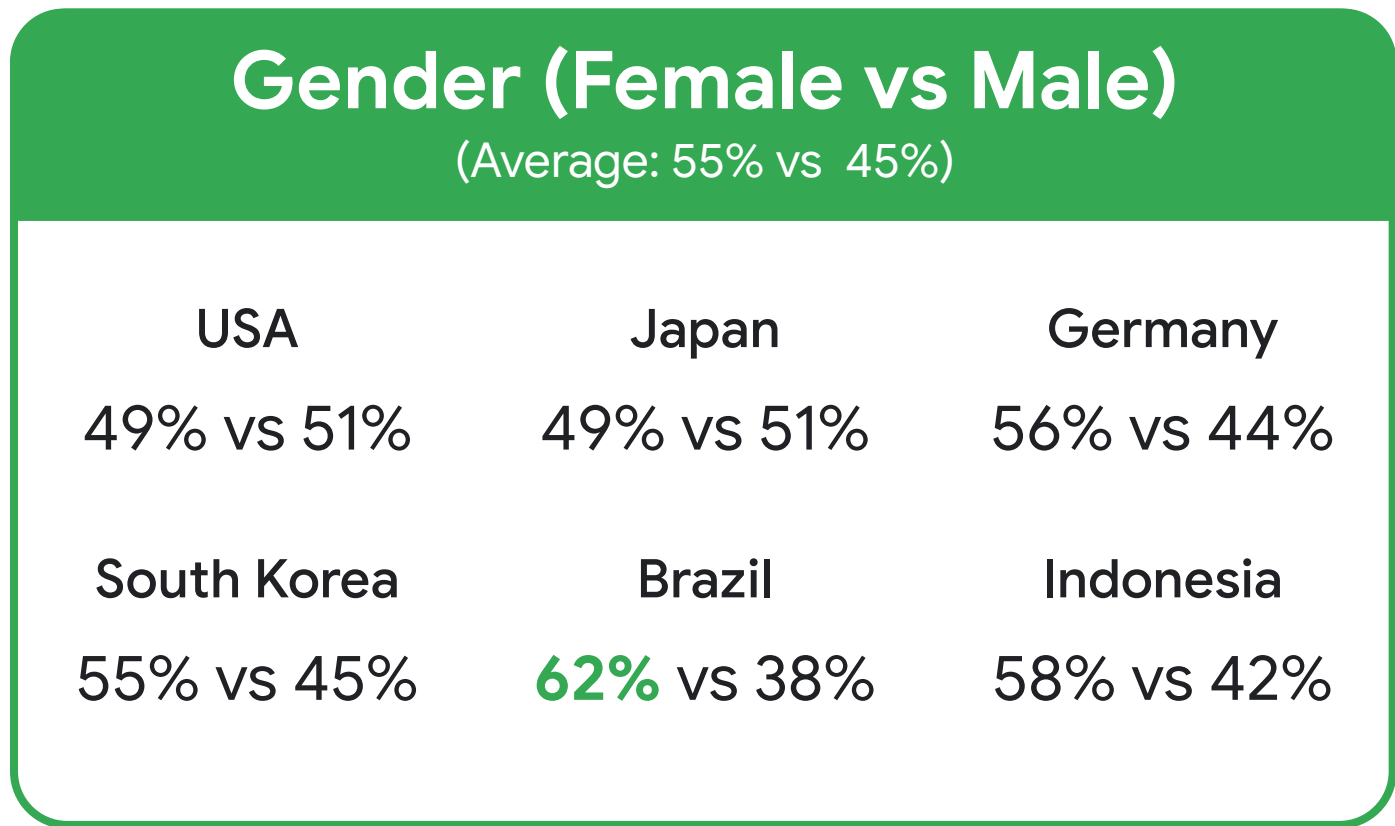
Sub-Genre Gamer Profile



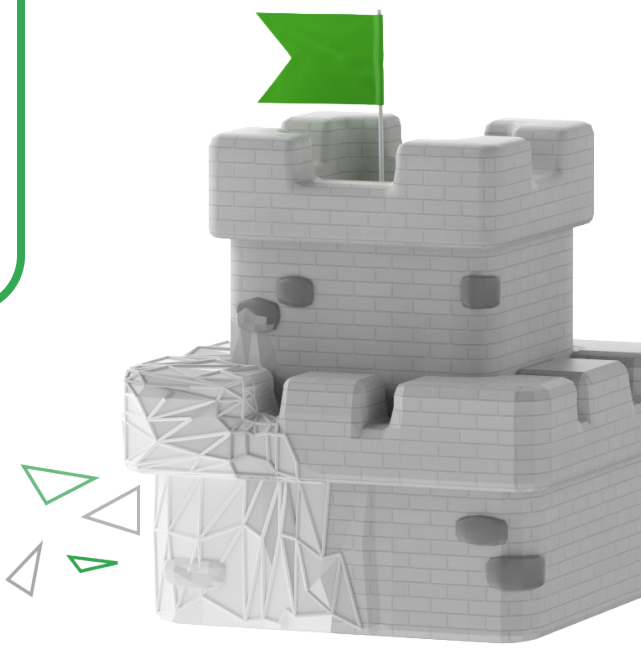
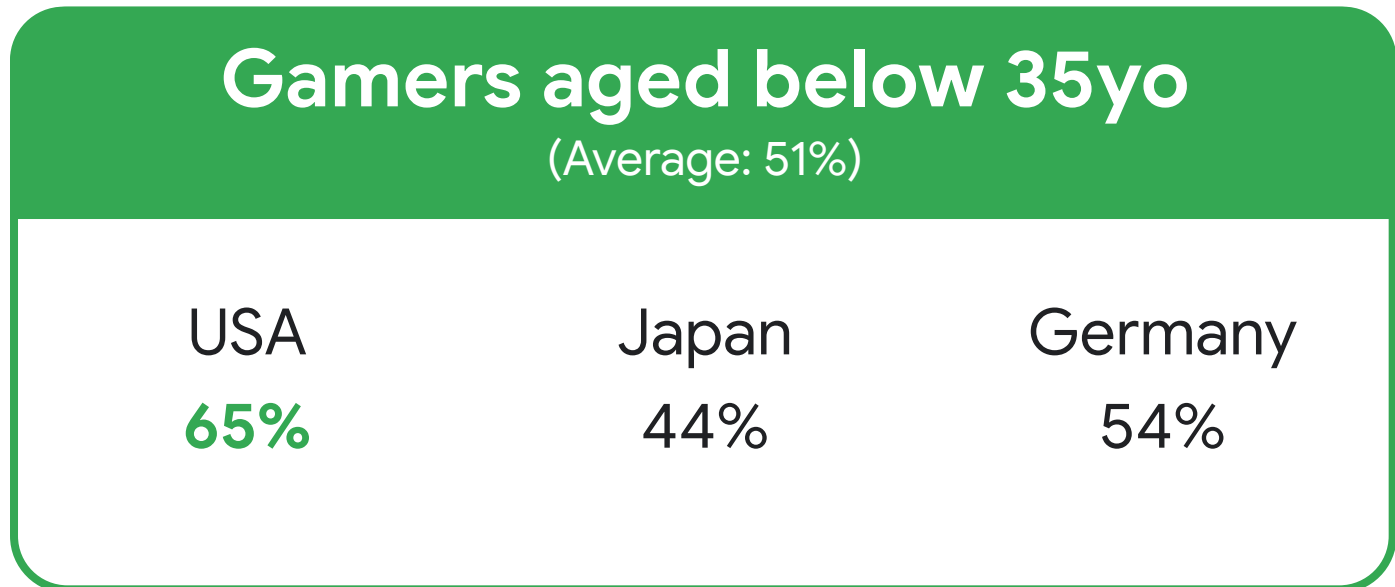
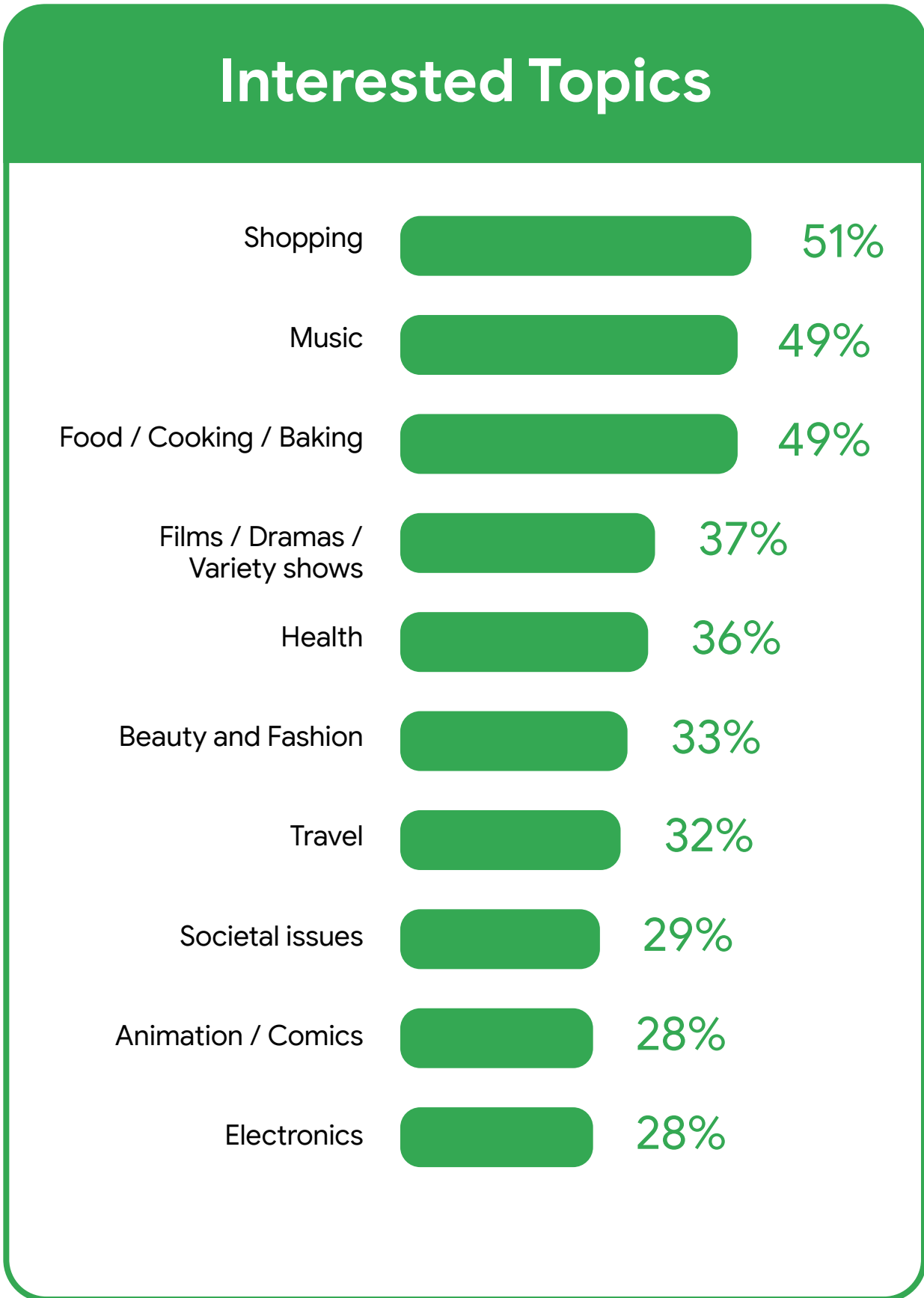
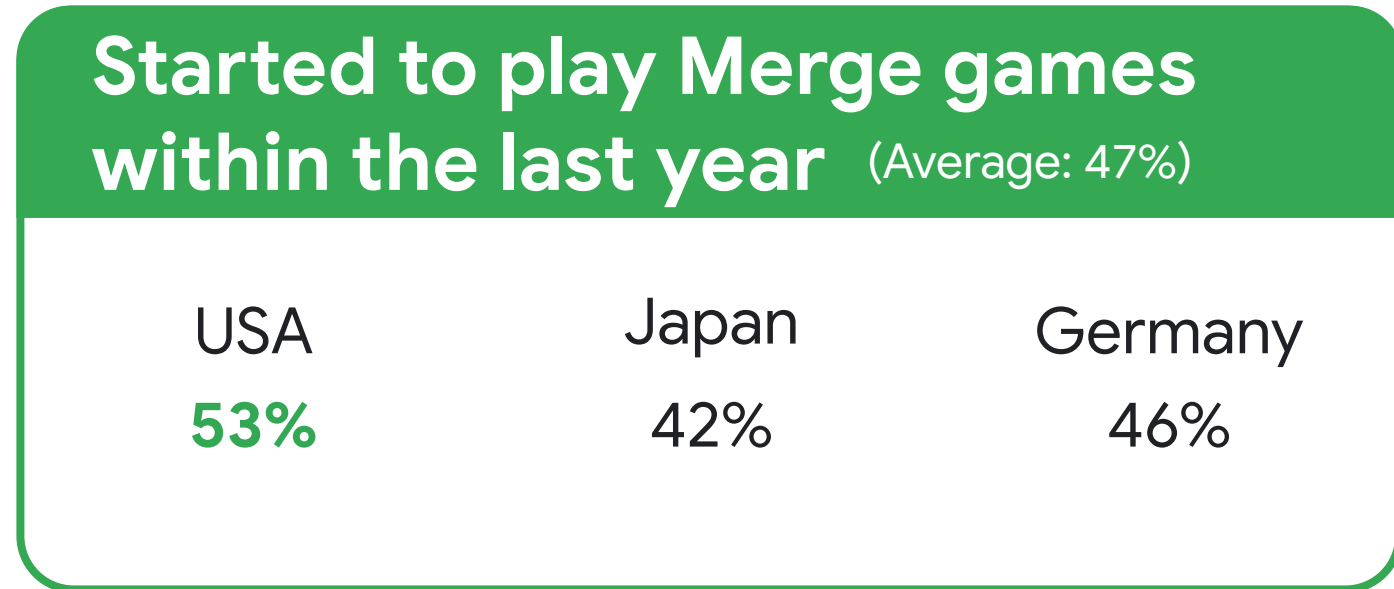
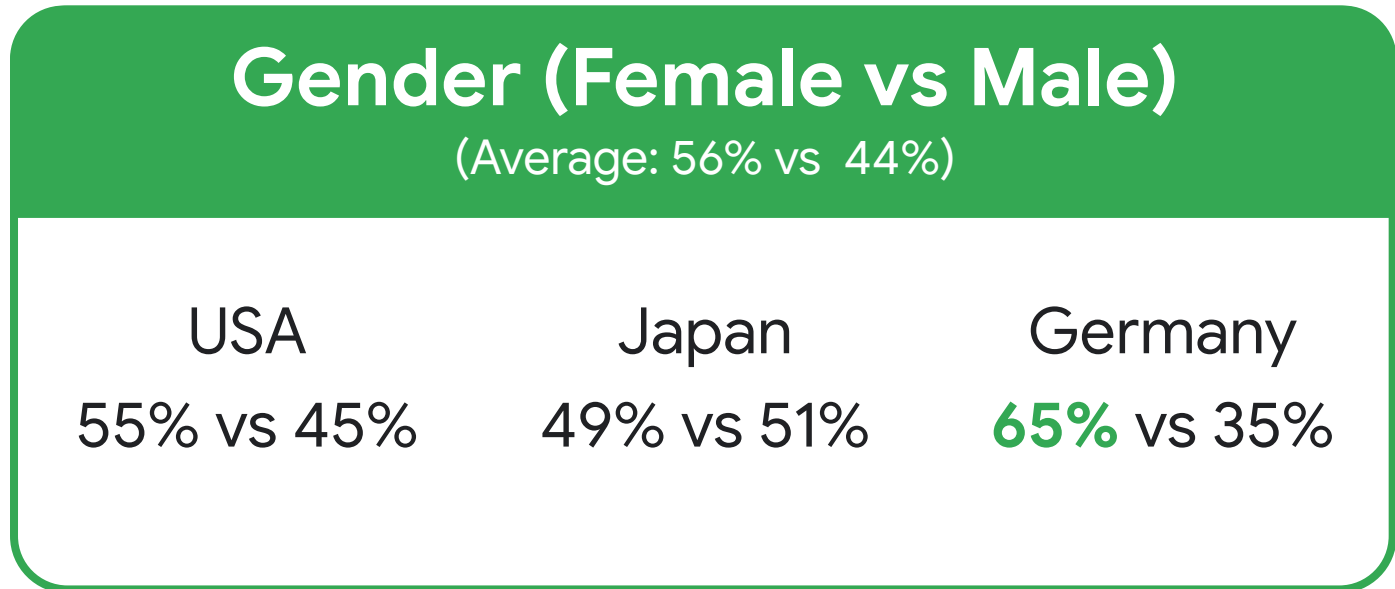
4X Strategy Gamer



Tycoon Gamer



Merge Gamer



Three actions to achieve gamers' immersiveness



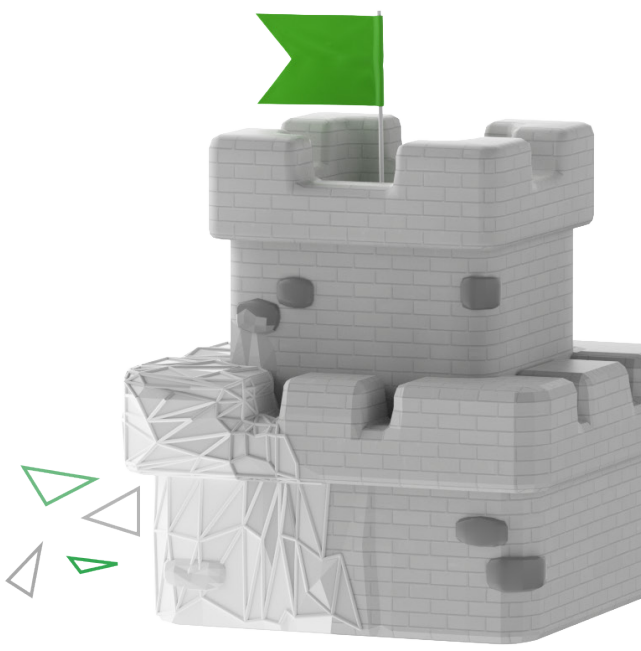
1. Connect to their interests



2. Offer them diverse game experiences

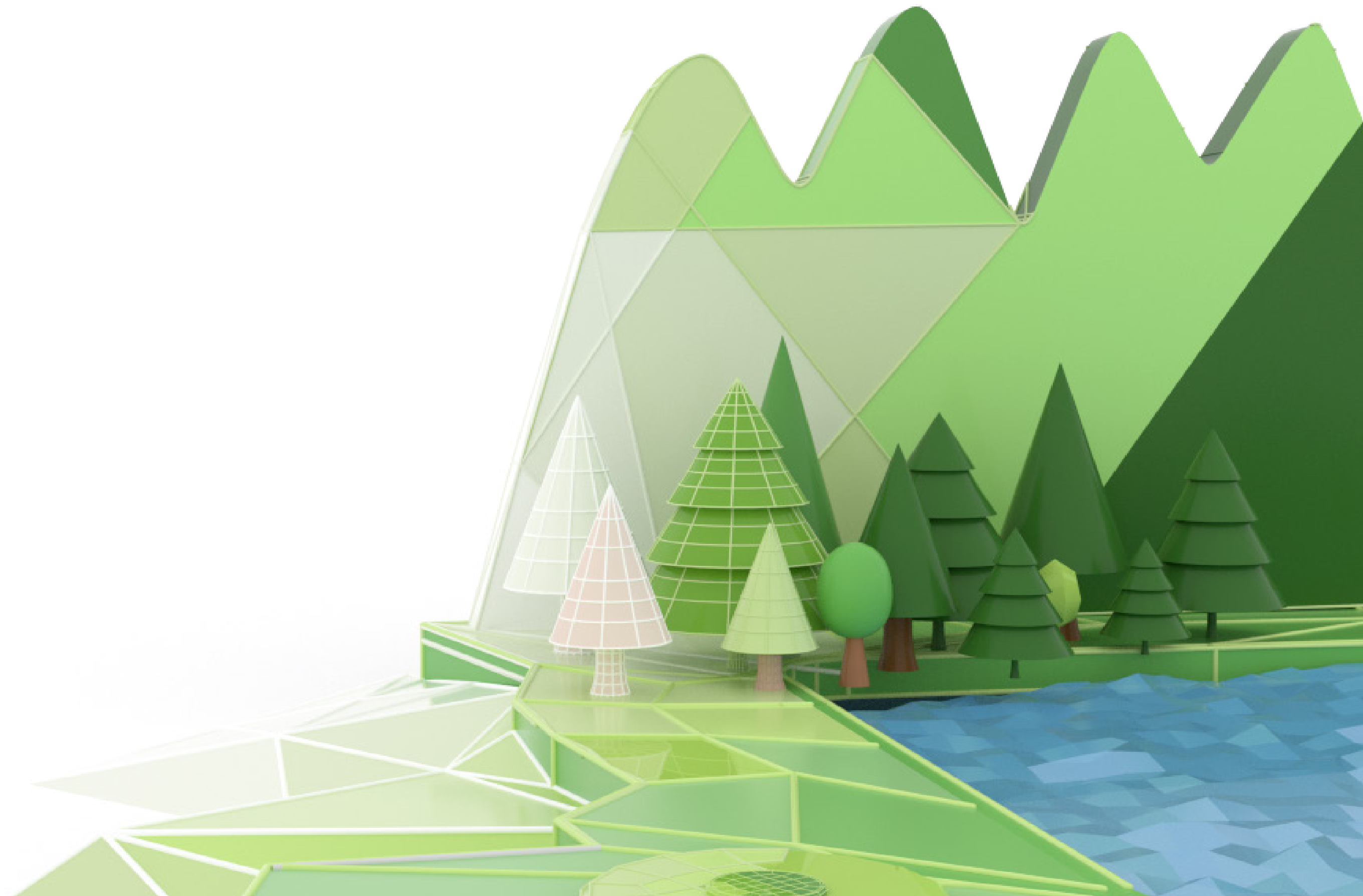


3. Enhance their belongingness to the game



Reach Gamers

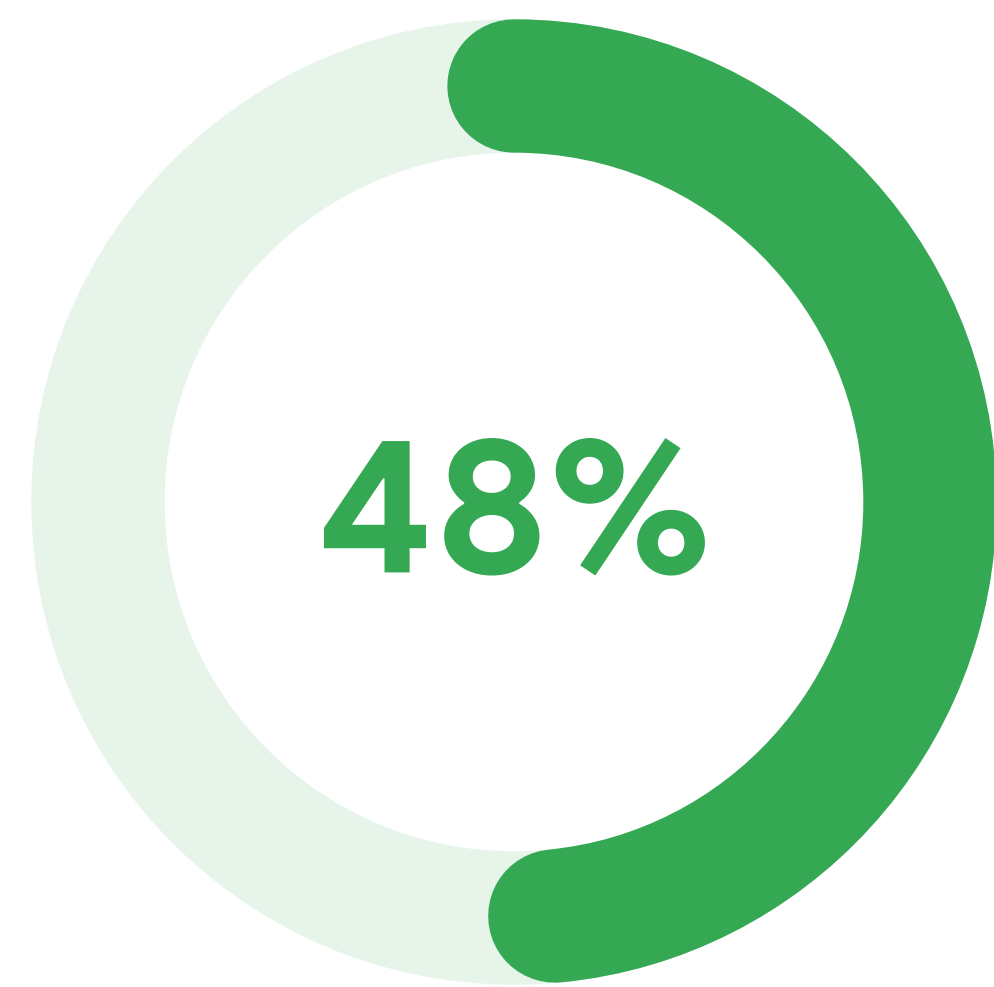
Connect to their interests



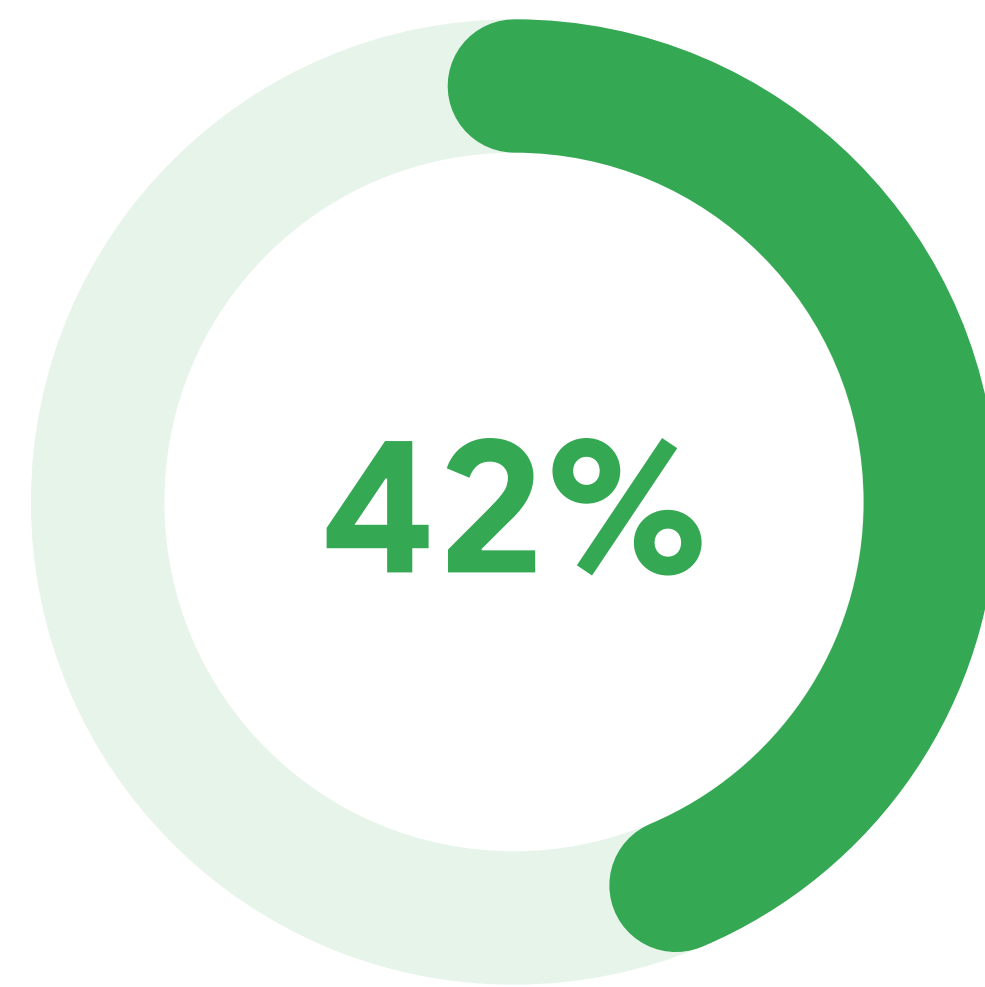
Gamers are influenced to trial new games due to genre familiarity, fun videos, and an interesting in-game story

A new game within a genre that has been played before is significantly higher in LATAM markets

What Influences Mobile Players to Try Out New Games? - Top 3 Reasons



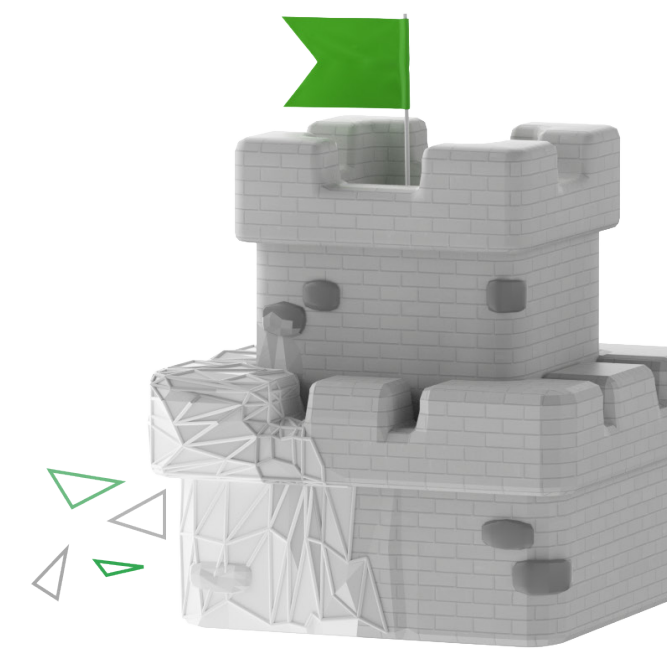
Game genre that I usually like



Look fun in videos I watch



Story seems interesting



“Maybe the puzzles are my favorite part about [the 4X strategy game], and just the mechanics of it. **It’s mindless enough that I can keep playing it, and it’s not too hard to grasp when you start it.**”

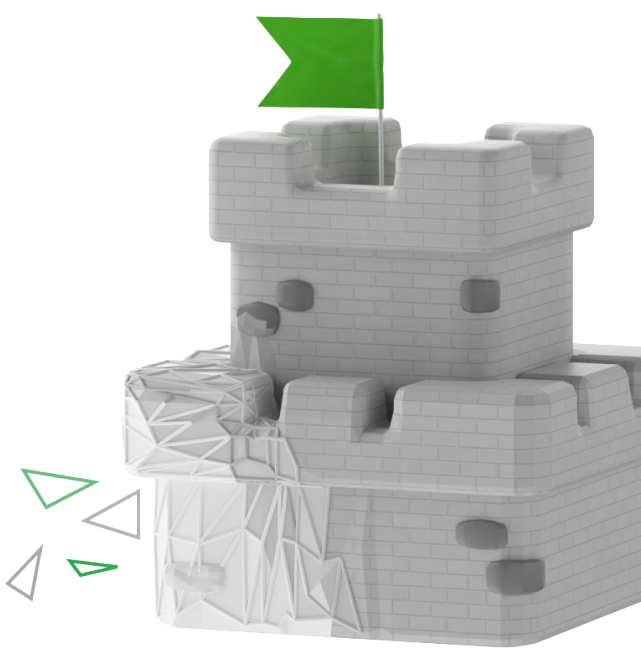
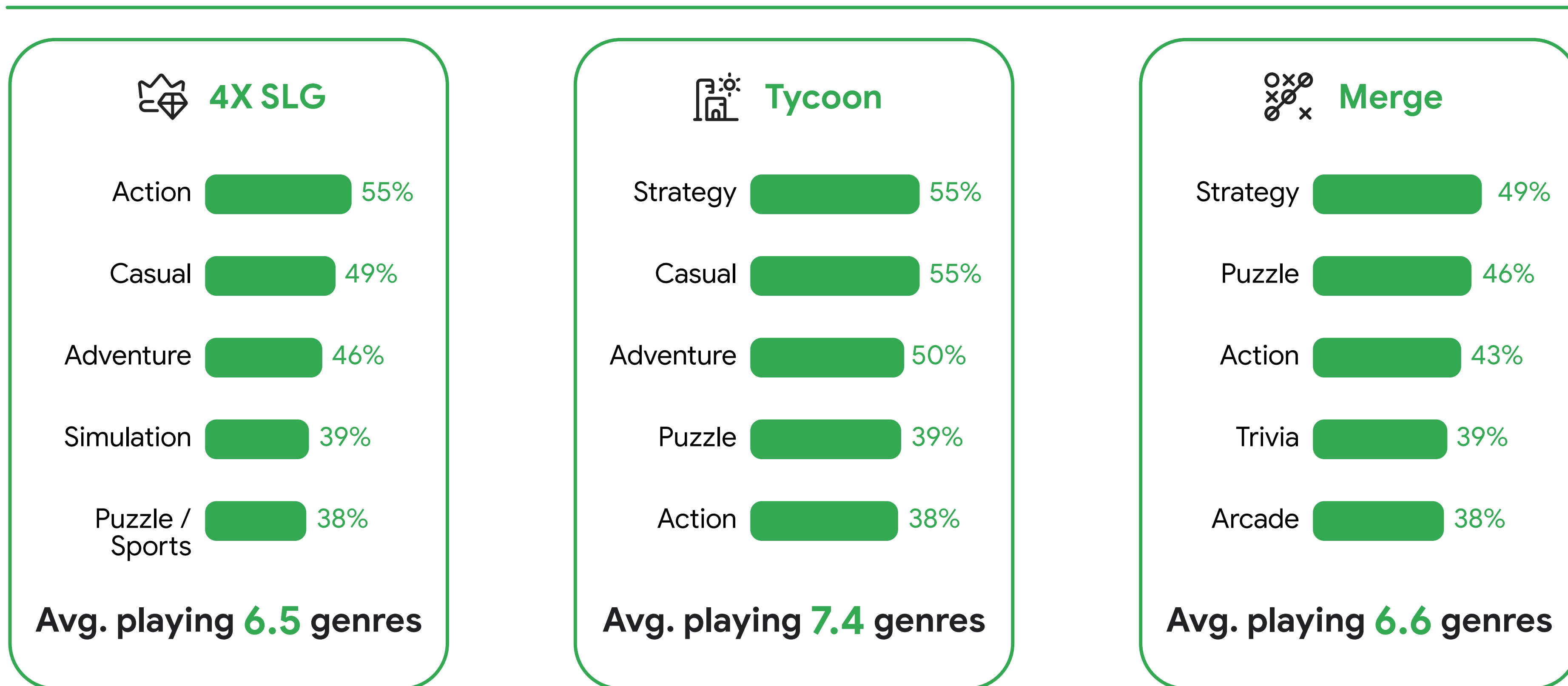
—— USA, Male, 4X SLG New Gamer



Genres are more nebulous than before with gamers playing multiple genres at the same time. Adding familiar elements can effectively drive attention

More than 50% of Tycoon gamers are also playing strategy games

Top 5 Game Genres Also Playing

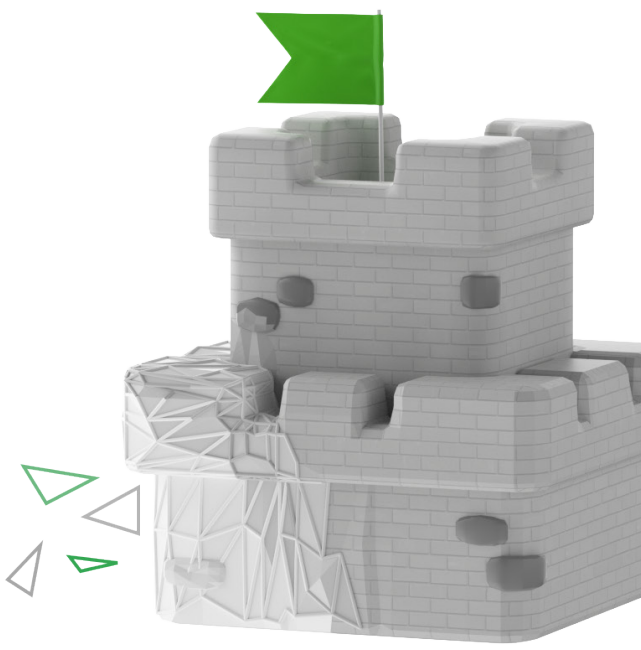


Gaming videos are a critical source to learn about new games, especially for in-game spenders

4X SLG spenders are more likely to get new information from online video platforms, especially in Indonesia and USA

Top 3 Reasons to Use Online Video Platforms

		Game Spender	Game Non-Spender
4X SLG	Learn tips and tricks	36%	37%
	Learn from gameplay	31%	31%
	Keep up-to-date on new / popular games	31%	22%
Tycoon	Learn tips and tricks	41%	35%
	Keep up-to-date on new / popular games	34%	26%
	Learn from gameplay	34%	30%
Merge	Learn tips and tricks	36%	26%
	Learn from gameplay	32%	23%
	Keep up-to-date on new / popular games	31%	22%



“When I was a child, I wanted to work as a florist, so I think the flower arrangement theme is interesting - customers will come to me, and they want certain types of flowers, and I'm making an arrangement to fit that.”

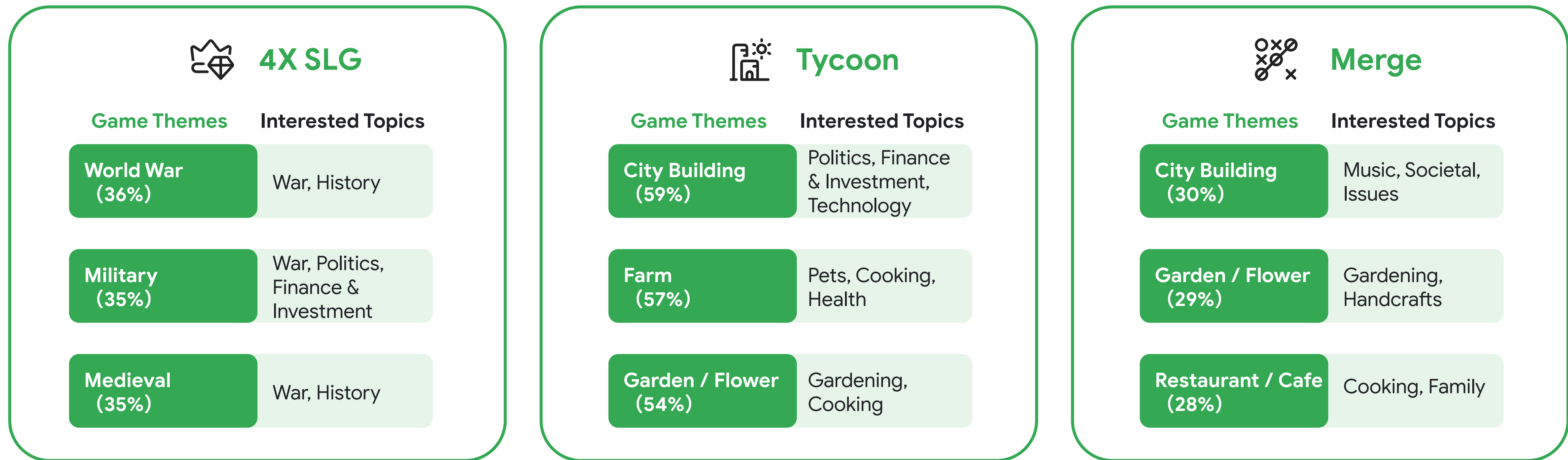
—— Japan, Female, Tycoon Experienced Gamer



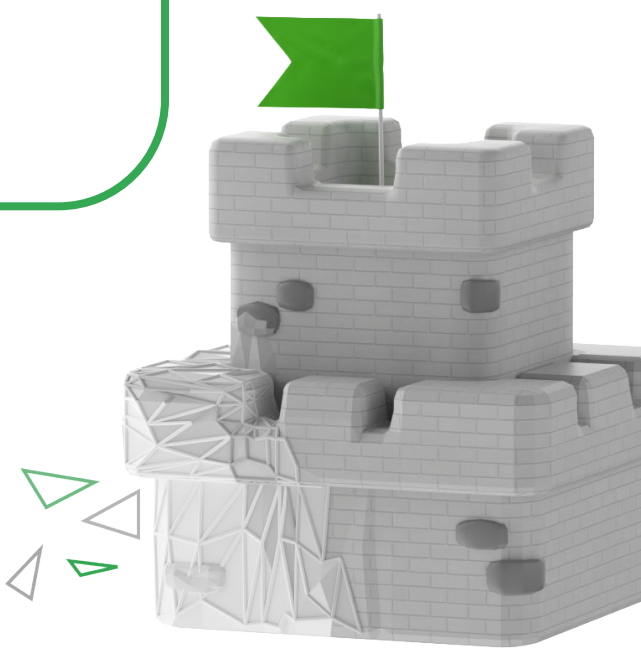
Games are an extension of their real life, with their interests being reflected in their preferred gaming themes

4X SLG gamers who prefer war and military themed games are more likely to be interested in history and military topics. While for Tycoon and Merge gamers, they enjoy DIY in their daily life, which leads to the high preference for farming and gardening topics

Expected Game Themes vs. Interested Topics



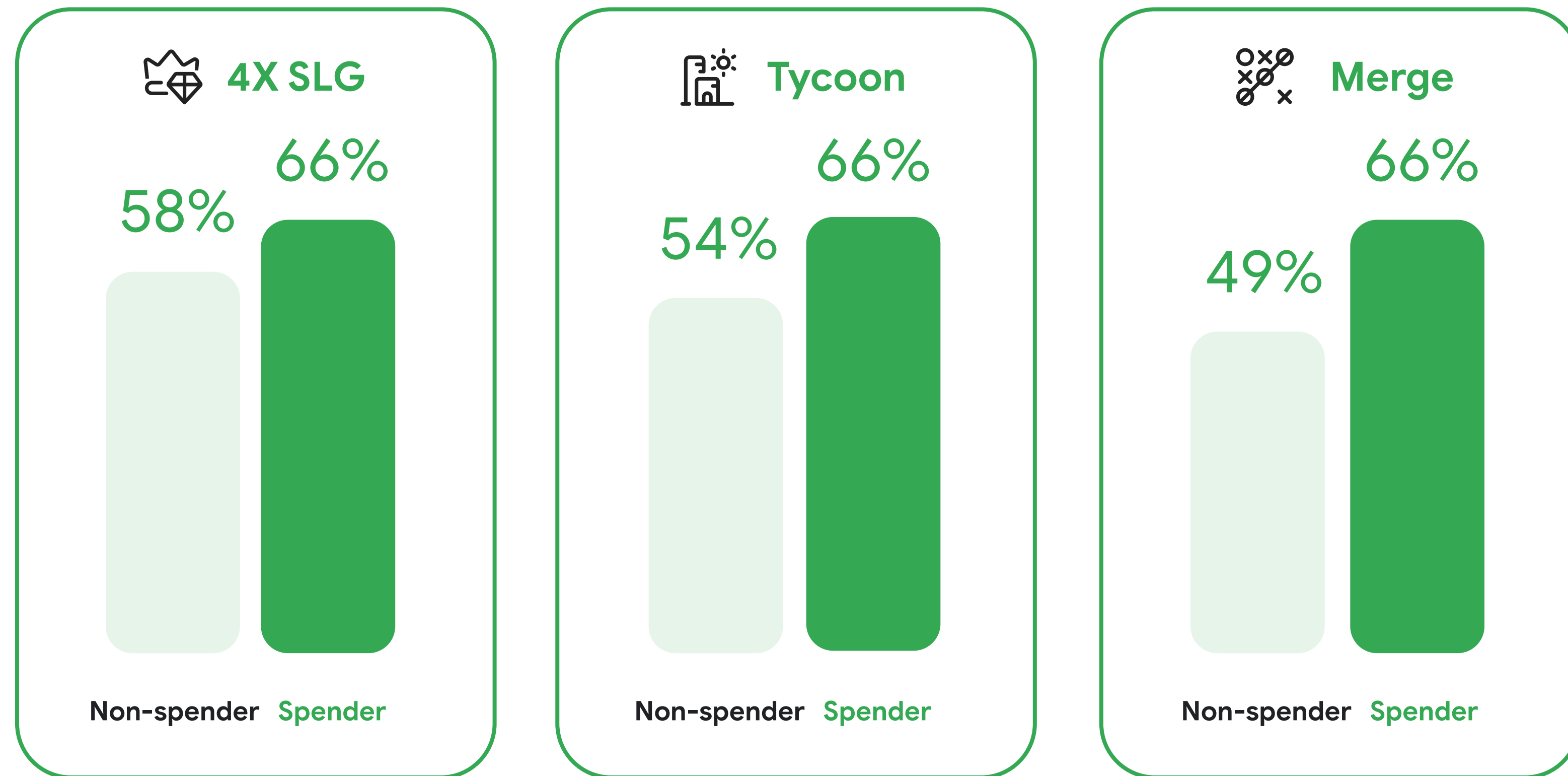
* Please refer to the appendix for interested topics of mobile gamers from each market



IP franchises provide great appeal, even more so for in-game spenders

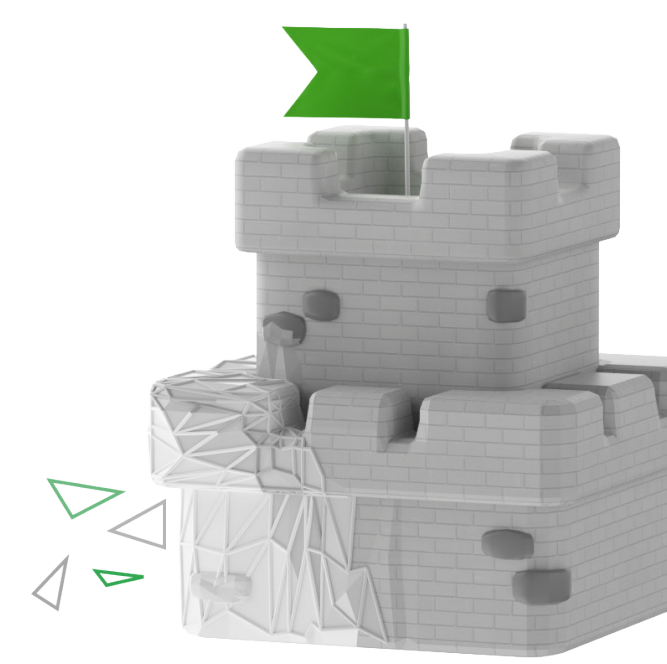
Gamers expect to "immerse themselves" within the game IP

“IP franchises within mobiles are a significant appeal factor to me”



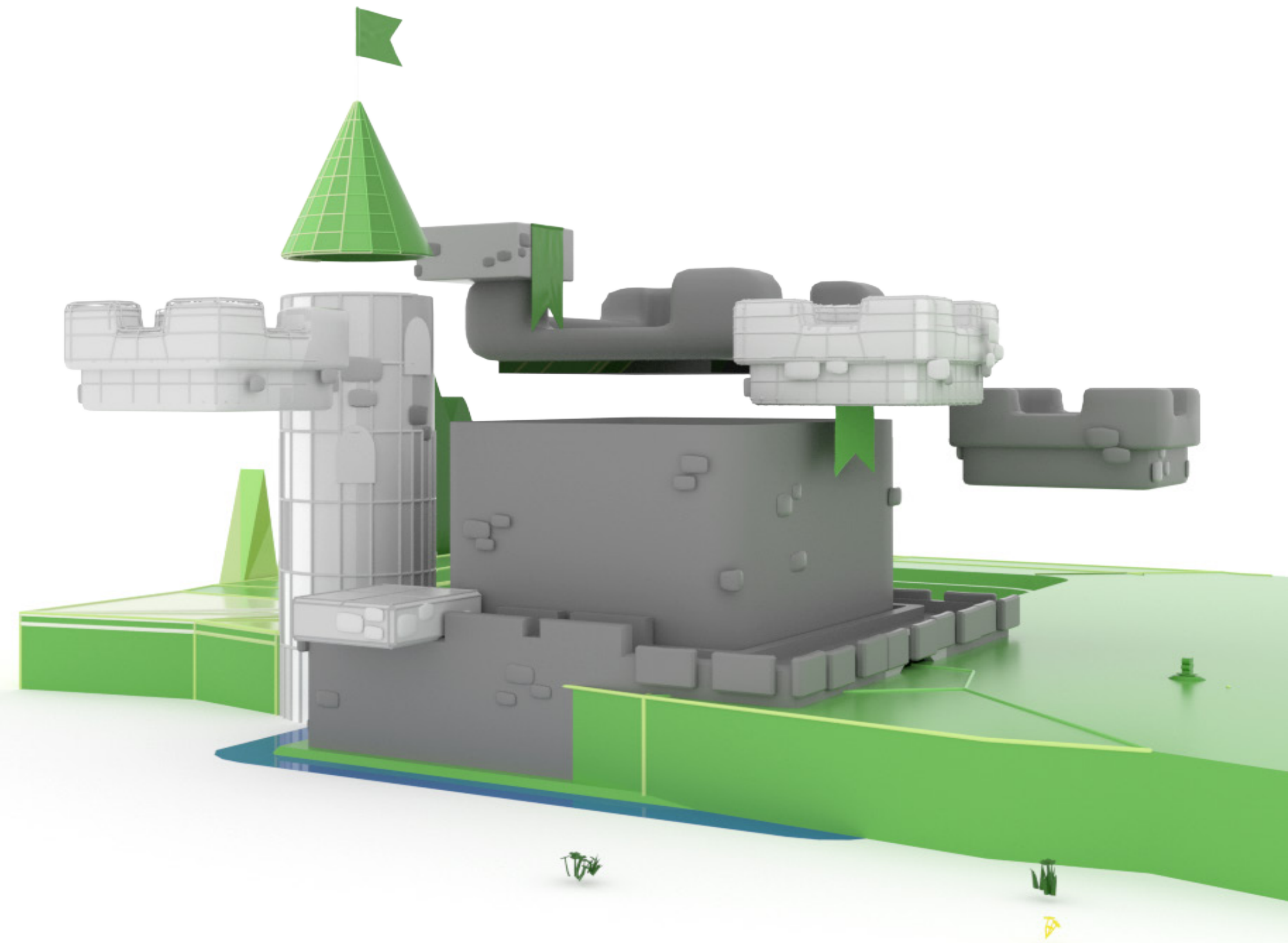
“I’d say [xx zombie SLG game] is the game I’m most engaged to. I’m a fan of the show and I like certain characters, so it’s just cool just to do the same thing like strategize and figure out how to kill the zombie. I see myself going around the world and pretending to be on that show.”

— USA, Male, 4X SLG Experienced Gamer



Engage Gamers

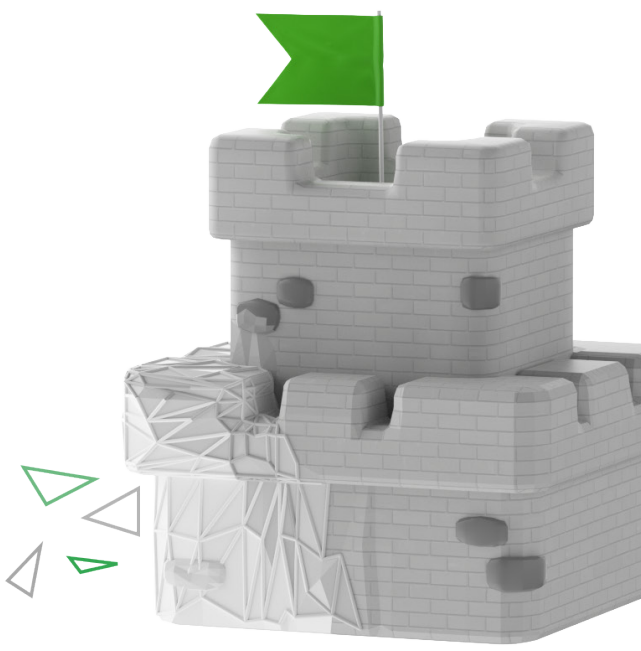
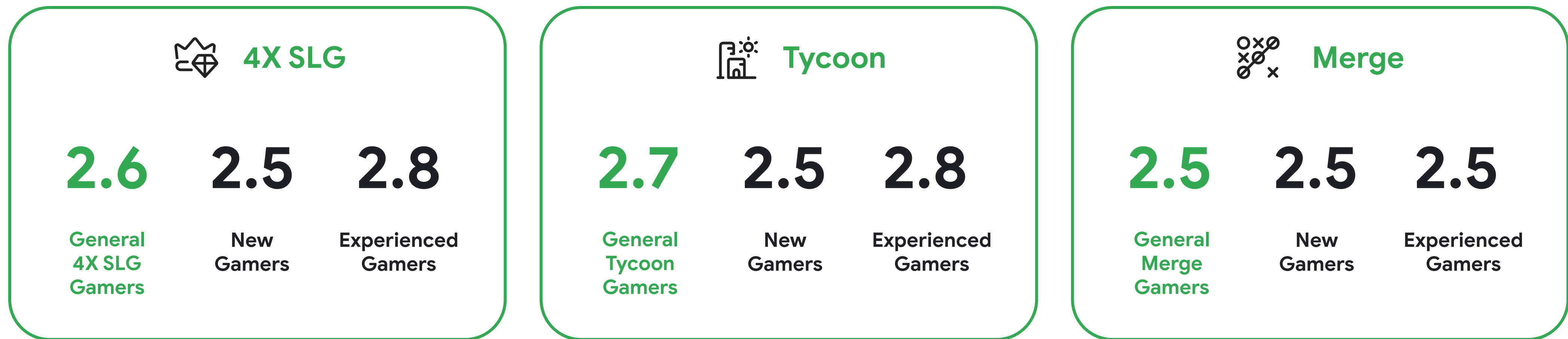
Offer them diverse
game experiences



Gamers make their decision whether to continue playing a new game within their first three game sessions

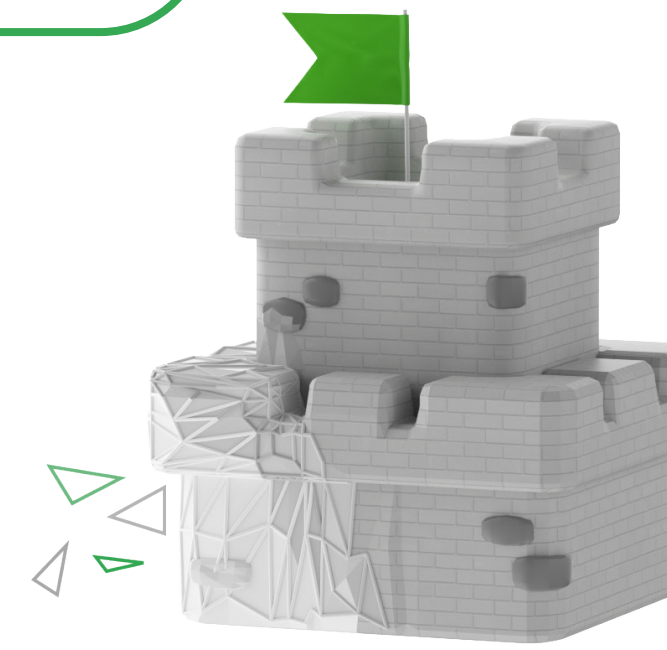
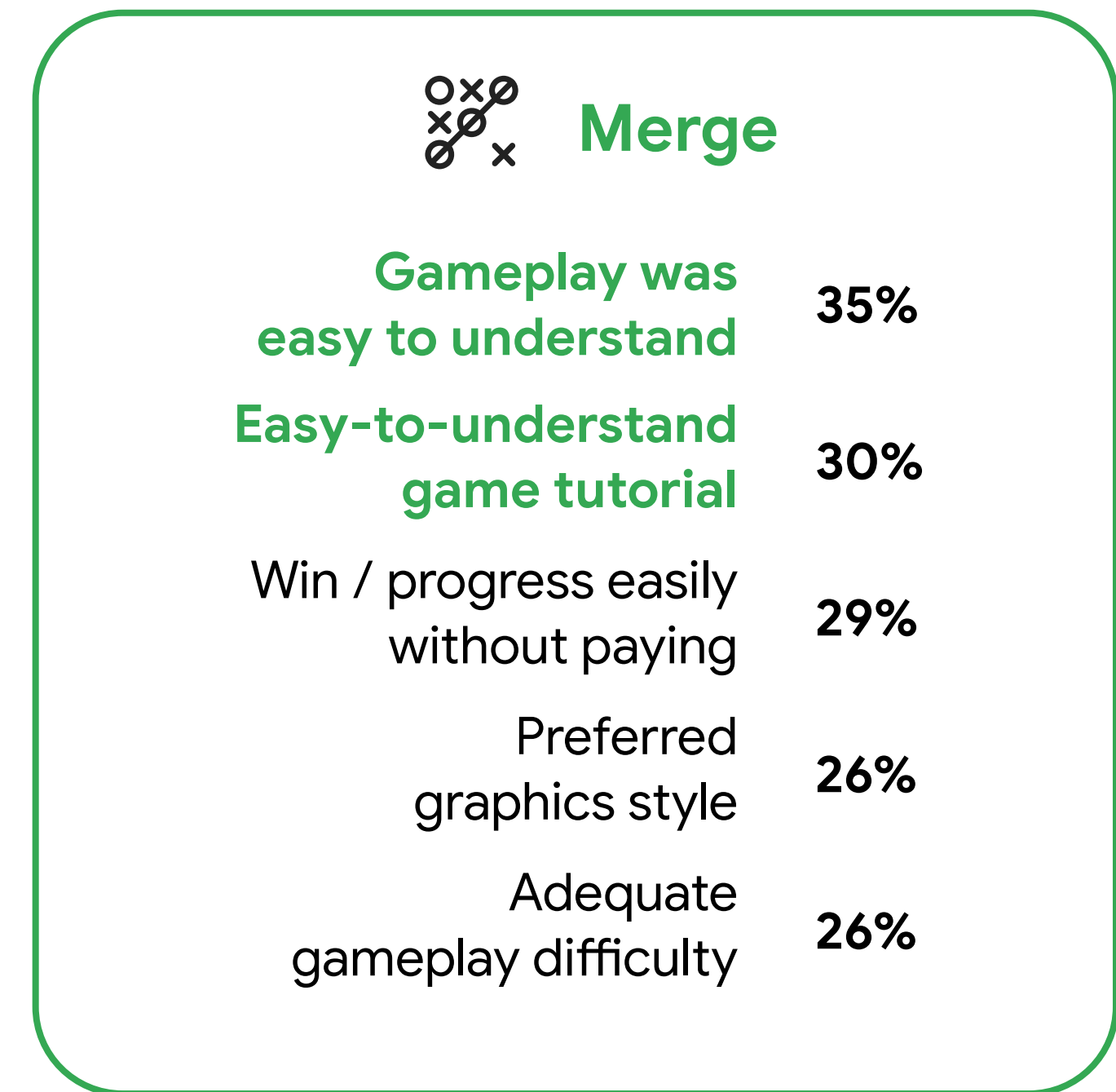
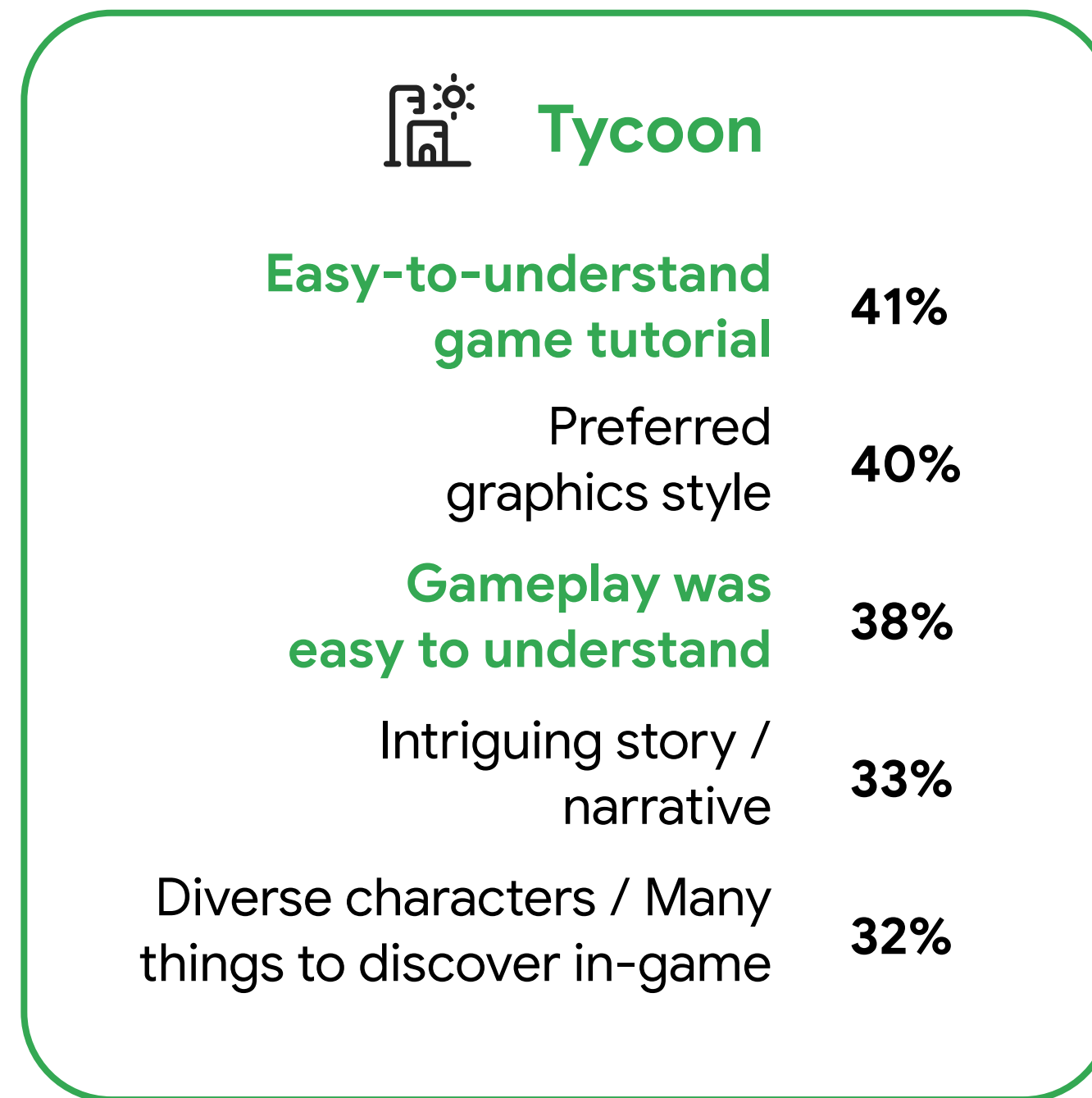
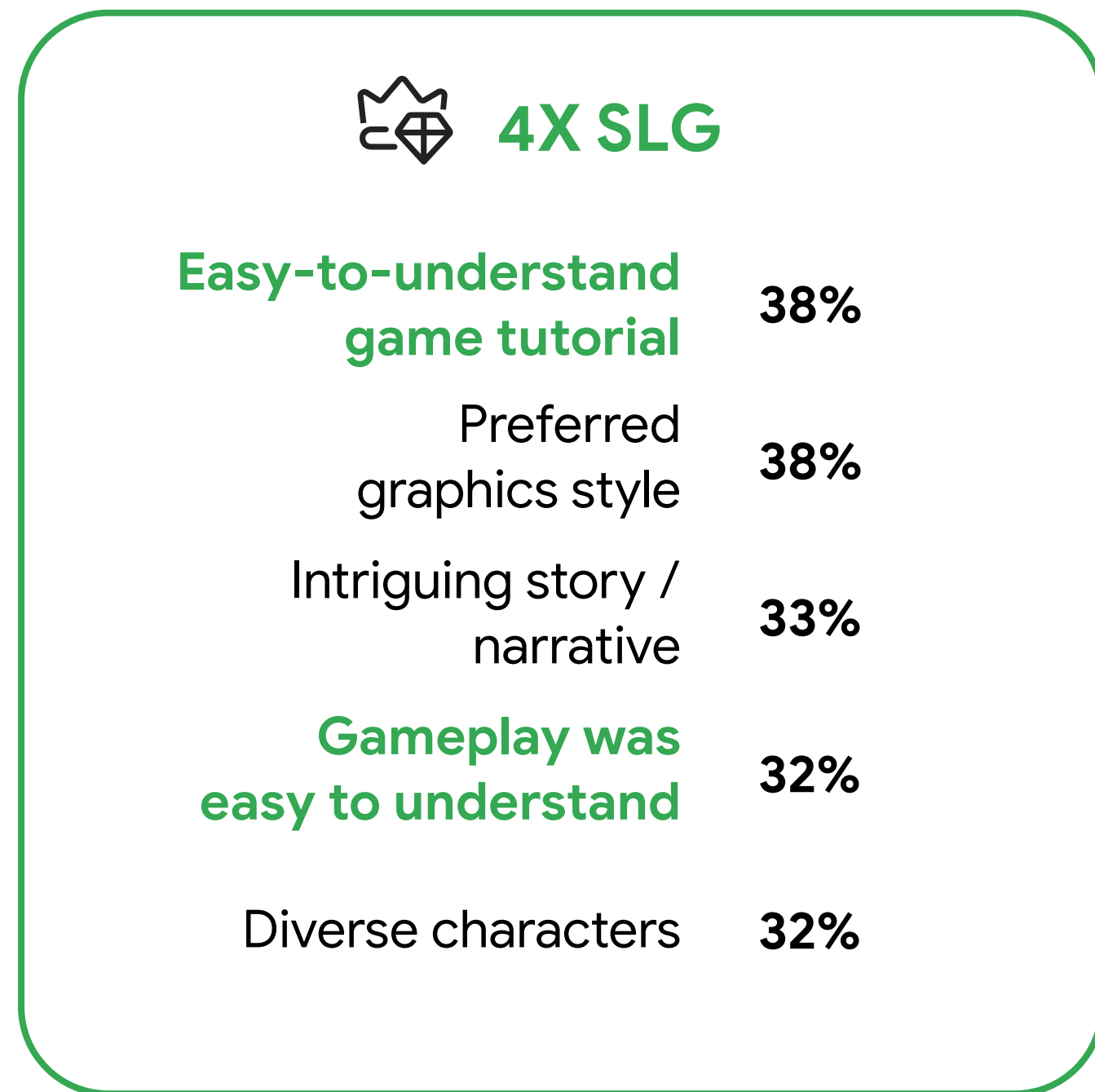
Gamers who are new to the genre expect to get started quickly, especially German gamers who have the fewest sessions for decision making

“When you try a new mobile game, how many gaming sessions does it usually take you to decide whether to continue to play the game or not?”



Easy-to-understand is the key reason for gamers to play longer

Top 5 Reasons to Decide to Play a Game for More than 30 Days



Easy to understand is more than just about control, it is also related to being easy to pick up, and to having a clear purpose of playing

Mindless playing

“I could just **mindlessly be good at something**, but they’re challenging in the many little games that they have, that's what I like about it.”

— USA, Female, Merge New Gamer

Easy on and off

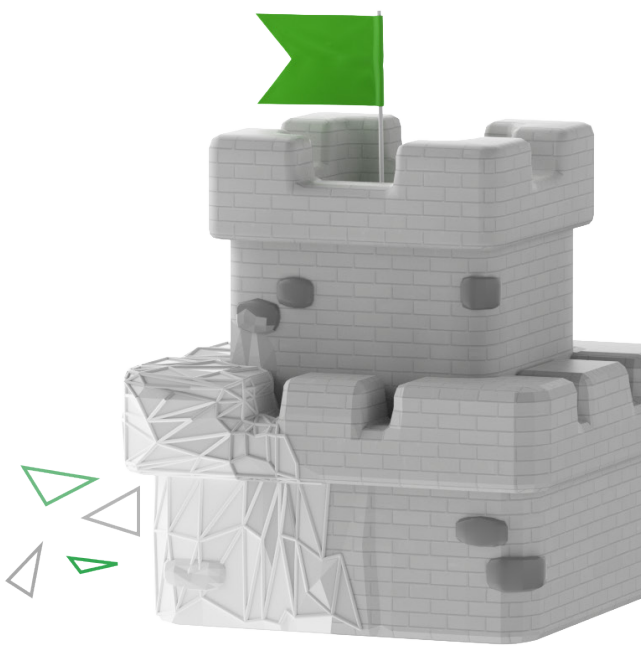
“You don’t spend all your time on. It’s **easy to put down and pick up again**. That goes well because my day is like a lot of pauses in between and little breaks. If it requires a larger time commitment, it just makes it more difficult for me to get into.”

— USA, Male, 4X SLG New Gamer

Play with a purpose

“I feel like the tutorials are there and they’re helpful in the moment, but in terms of the bigger, overall picture, I don’t really have a **good understanding of the goals of the game.**”

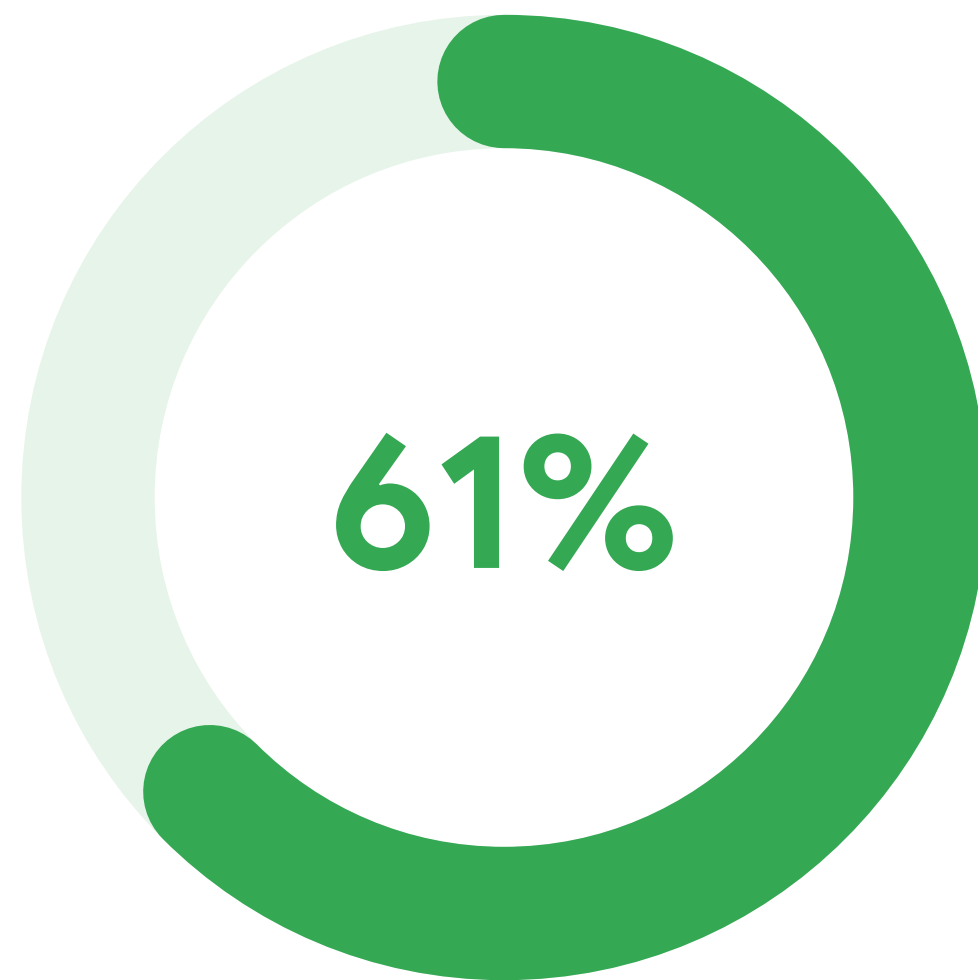
— USA, Female, Tycoon New Gamer



Building a customizable gaming experience enables gamers to find the “me” in the game

Gamers have a desire to improve their in-game immersion by adding their own personalized touches to the characters

“I think diverse characters and stories are important, as they can show the cultural differences”



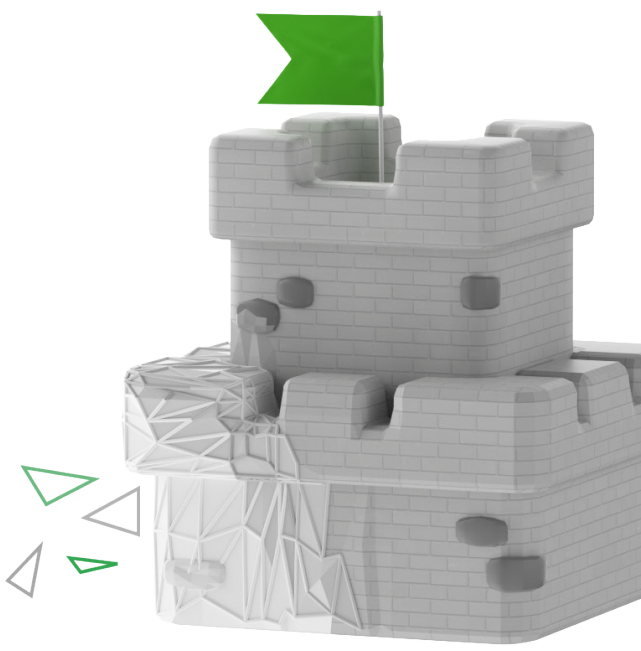
Spenders



Non-spenders

“Customizing characters impresses me a lot, I wish that there are more complexion and hair colors. The more options it has, the better it is. I'll thus be more focusing on characters and stories in the game, for I think I can connect to it. Also, after I devote myself to this character, I would like to know what will happen next.”

— USA, Female, Merge Experienced Player



4X SLG spenders enjoy proving their competitive competence and discovering new content

4X SLG Spender vs non-spender
Stronger Demands for Gaming Experience

Most Exciting Moment

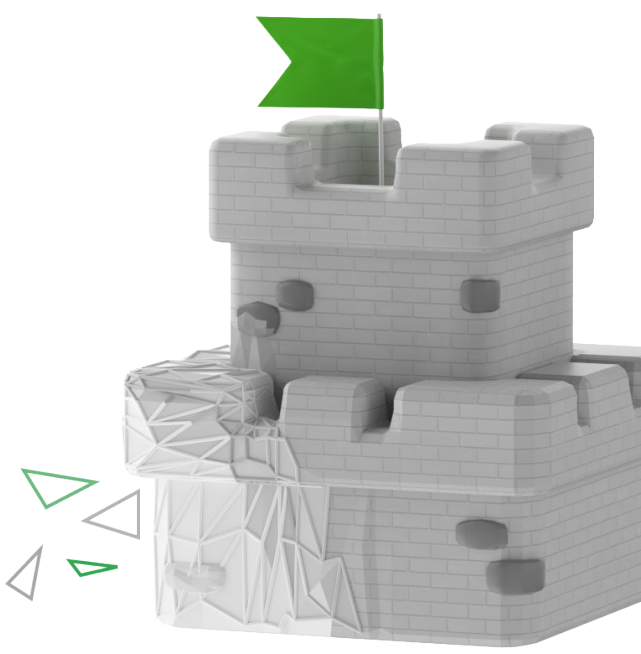
	Index*
Defeated in-game characters	1.7 x
Won over other gamers	1.6 x
Discovered games that integrate well known stories & media franchises	1.4 x
Discovered new items / abilities	1.4 x
Achieved best performance in the leaderboard	1.3 x

Most Frustrating Moment

	Index*
Played with / against other gamers, the experience is too toxic	1.7 x
In-game characters could not be defeated	1.4 x
New story / narrative was difficult to unlock	1.3 x
Unstable / unsmooth game connection	1.3 x
Missed unlocking limited-edition or rare characters	1.2 x

* Index: Compare the percentage of spender and non-spender to show the significance of spender on that topic

Google / Ipsos, 2022 The Shifting Needs of Global Mobile Gamers USA / Japan / Germany / South Korea / Brazil / Indonesia, 2022 April
Q. What do you think are the most exciting moments when playing mobile games? Q. What do you think are the most frustrating moments when playing mobile games? Base: 16-54 yo Subgenre mobile gamers; 4XSLG spenders n=897, non-spender n=903



Tycoon spenders have a higher desire to play with others. New characters is one of the key triggers for exploring within the game

 **Tycoon Spender** vs non-spender
Stronger Demands for Gaming Experience

Most Exciting Moment

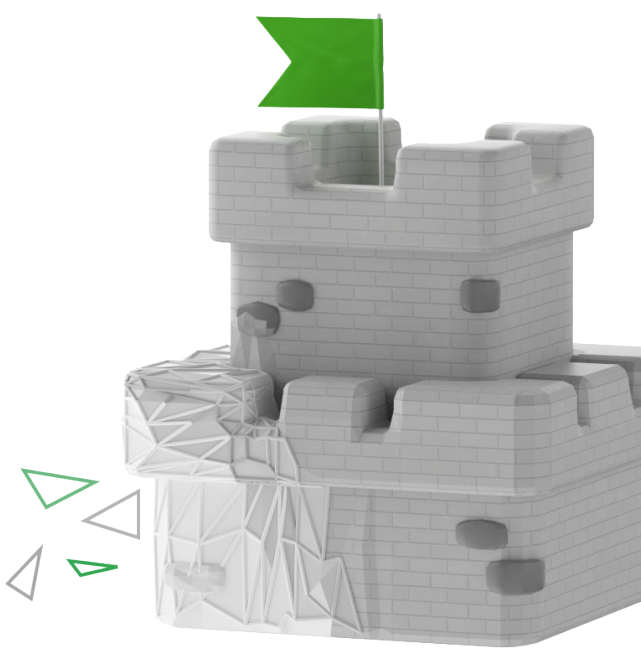
	Index*
Played with other gamers	1.7 x
Included in-game ads that offer me rewards	1.6 x
Discovered games that integrate well known stories & media franchises	1.4 x
Unlocked new characters	1.3 x
Achieved best performance in the leaderboard	1.2 x

Most Frustrating Moment

	Index*
Missed unlocking limited-edition or rare characters	1.5 x
New story / narrative was difficult to unlock	1.4 x
New characters became too similar / less interesting	1.3 x
Difficult-to-understand game tutorial	1.3 x
Required to spend money to win / progress in-game	1.2 x

* Index: Compare the percentage of spender and non-spender to show the significance of spender on that topic

Google / Ipsos, 2022 The Shifting Needs of Global Mobile Gamers USA / Japan / Germany / South Korea / Brazil / Indonesia, 2022 April
Q. What do you think are the most exciting moments when playing mobile games? Q. What do you think are the most frustrating moments when playing mobile games? Base: 16-54 yo Subgenre mobile gamers; Tycoon spenders n=921, non-spender n=879



Merge gamers have a higher expectation on “extra rewards”

 **Merge Spender** vs non-spender
Stronger Demands for Gaming Experience

Most Exciting Moment

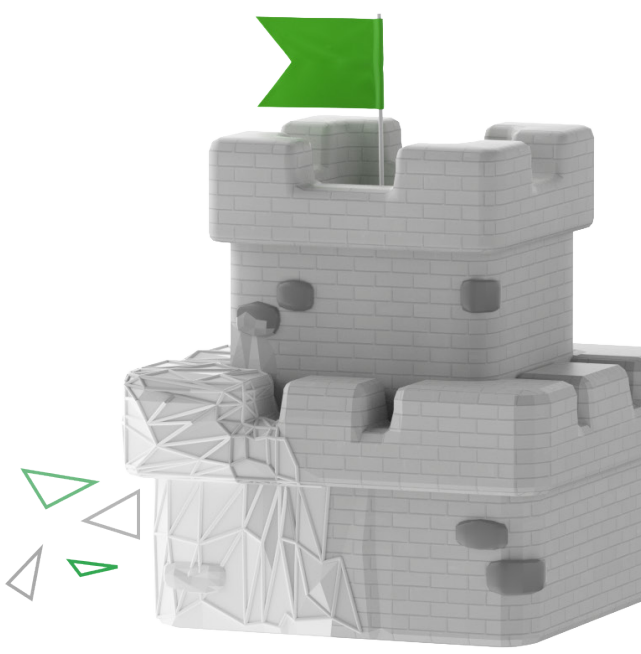
	Index*
Discovered games that integrate well known stories & media franchises	2.5 x
Won real-life prizes by playing the game	2.0 x
Unlocked new characters	1.6 x
Customize / upgrade characters or items	1.6 x
Discovered new items / abilities	1.5 x

Most Frustrating Moment

	Index*
Gameplay was too complicated / difficult to understand	1.8 x
New characters became too similar / less interesting	1.6 x
Rare / exclusive in-game items could get only by purchasing	1.3 x
Unstable / unsmooth game connection	1.2 x
Gameplay was too difficult to advance / progress	1.1 x

* Index: Compare the percentage of spender and non-spender to show the significance of spender on that topic

Google / Ipsos, 2022 The Shifting Needs of Global Mobile Gamers USA / Japan / Germany / South Korea / Brazil / Indonesia, 2022 April
Q. What do you think are the most exciting moments when playing mobile games? Q. What do you think are the most frustrating moments when playing mobile games? Base: 16-54 yo Subgenre mobile gamers; Merge spenders n=344, non-spender n=556



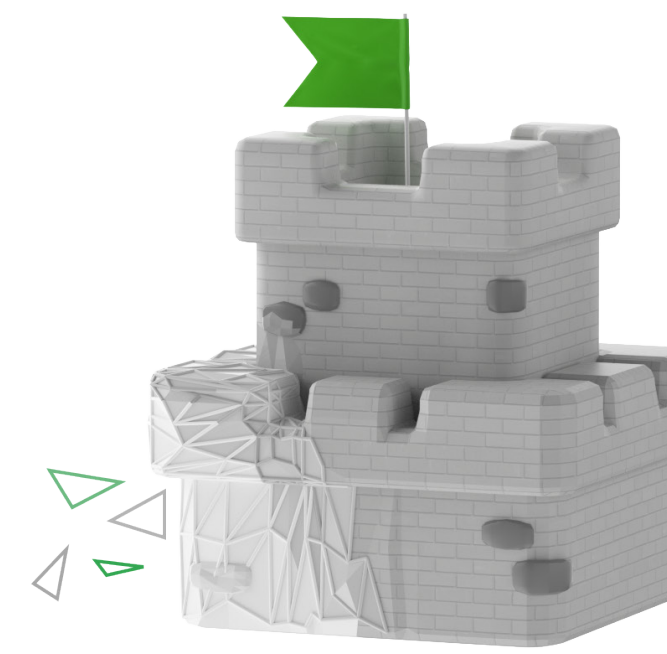
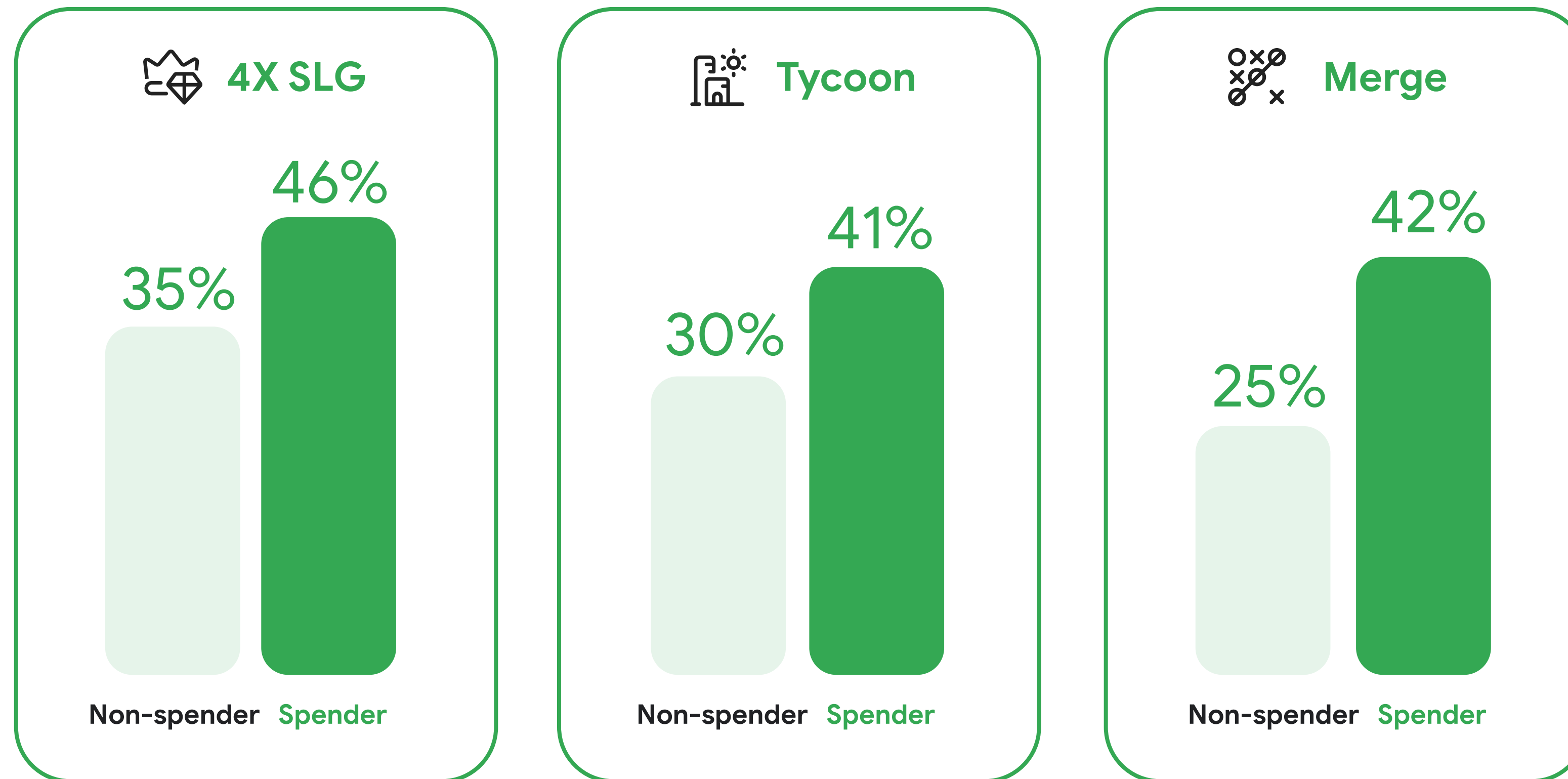
Retain Gamers

Enhance their
belongingness
to the game



Those who spend in the game are also more likely to play with others

% of Playing Mobile Games with Others



Playing with others in the game enhances the belongingness in their own social circle, both their online or offline connections

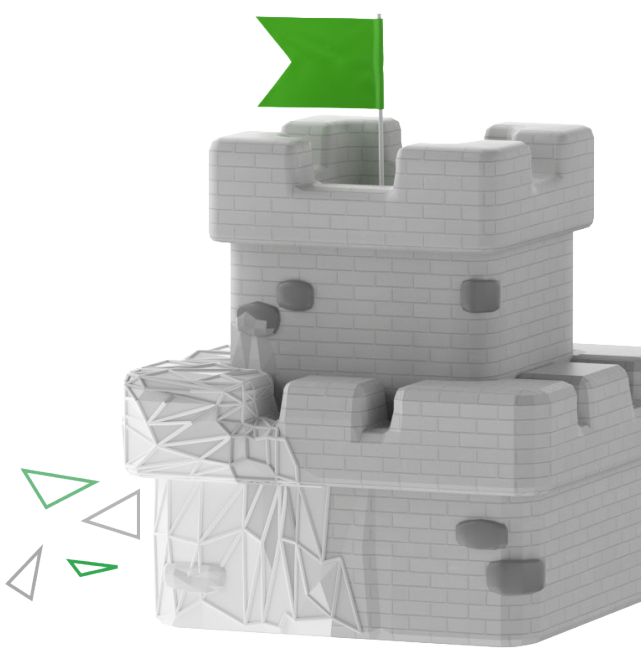
Reasons to Play Mobile Games Play with the others vs Play alone



“My niece and I didn’t know each other very well, but then games bring us a lot of common topics to talk about.”
— Japan, Female, Merge new gamer

* Index: Compare the percentage of gamers who play with others and play alone to show the significance of gamers who play with others on that topic

Google / Ipsos, 2022 The Shifting Needs of Global Mobile Gamers USA / Japan / Germany / South Korea / Brazil / Indonesia, 2022 April
Q. Who did you play the game with last time? Q. In general, why did you want to play the game? Base: 16-54 yo General mobile gamers; Play with others n=1735, Play alone n=4265



The in-game social activities also increase their spending

Reasons for Spending More in the Game Play with the others vs Play alone

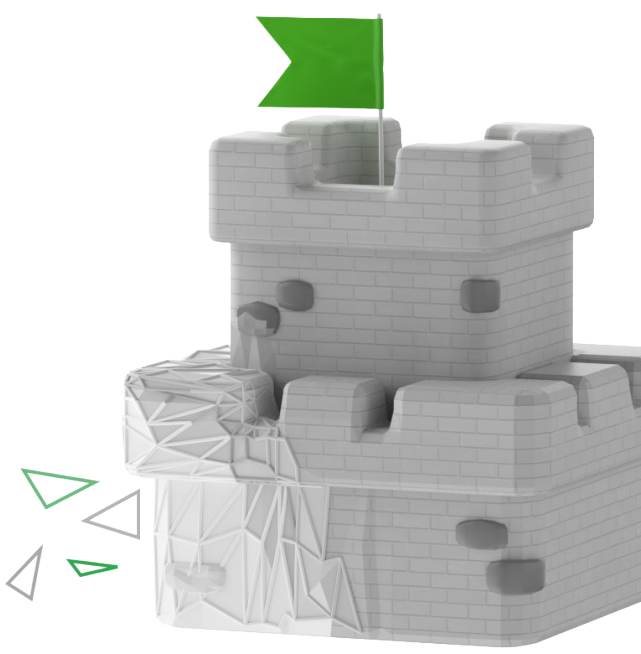


“People tend to depend on me, hoping me to help and protect them. I can only do that by spending in the game, and then become the core of the team, and thus I can be recognized. I could only do that within the game world.”

— Japan, Male, 4XSLG Experienced Gamer

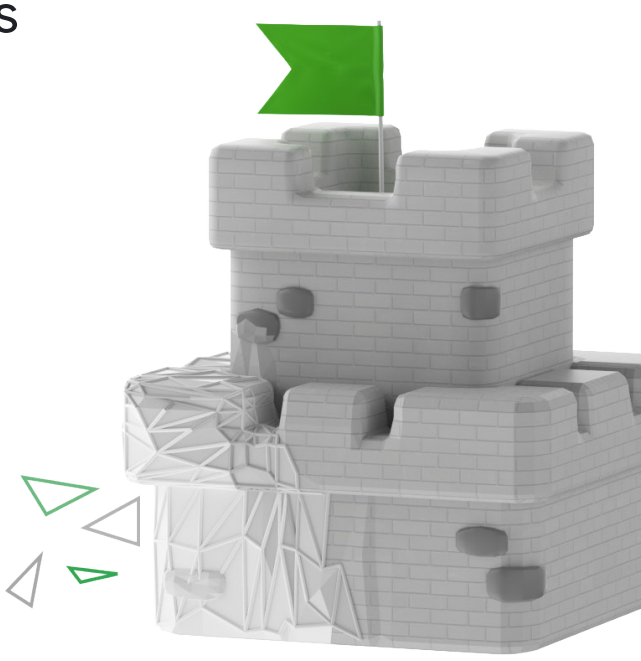
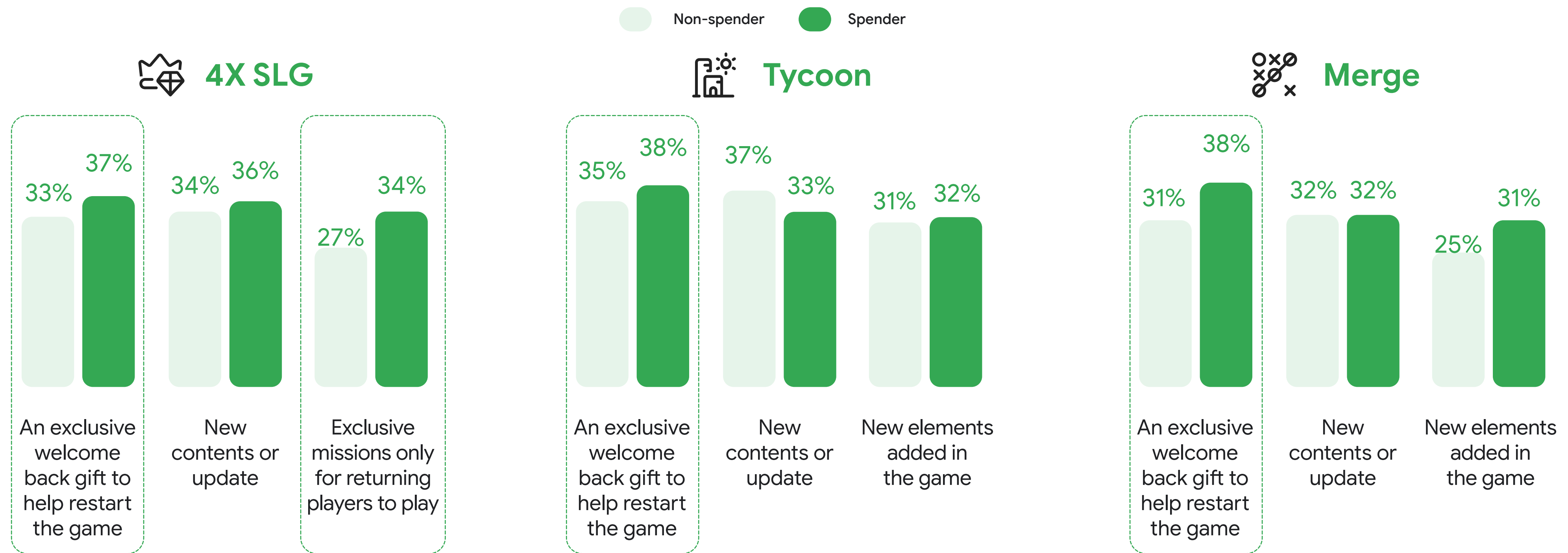
* Index: Compare the percentage of gamers who play with others and play alone to show the significance of gamers who play with others on that topic

Google / Ipsos, 2022 The Shifting Needs of Global Mobile Gamers USA / Japan / Germany / South Korea / Brazil / Indonesia, 2022 April
Q. Who did you play the game with last time? Q. What will encourage you to start paying / spend more in-game? Base: 16-54 yo General mobile gamers; Play with others n=1735, Play alone n=4265

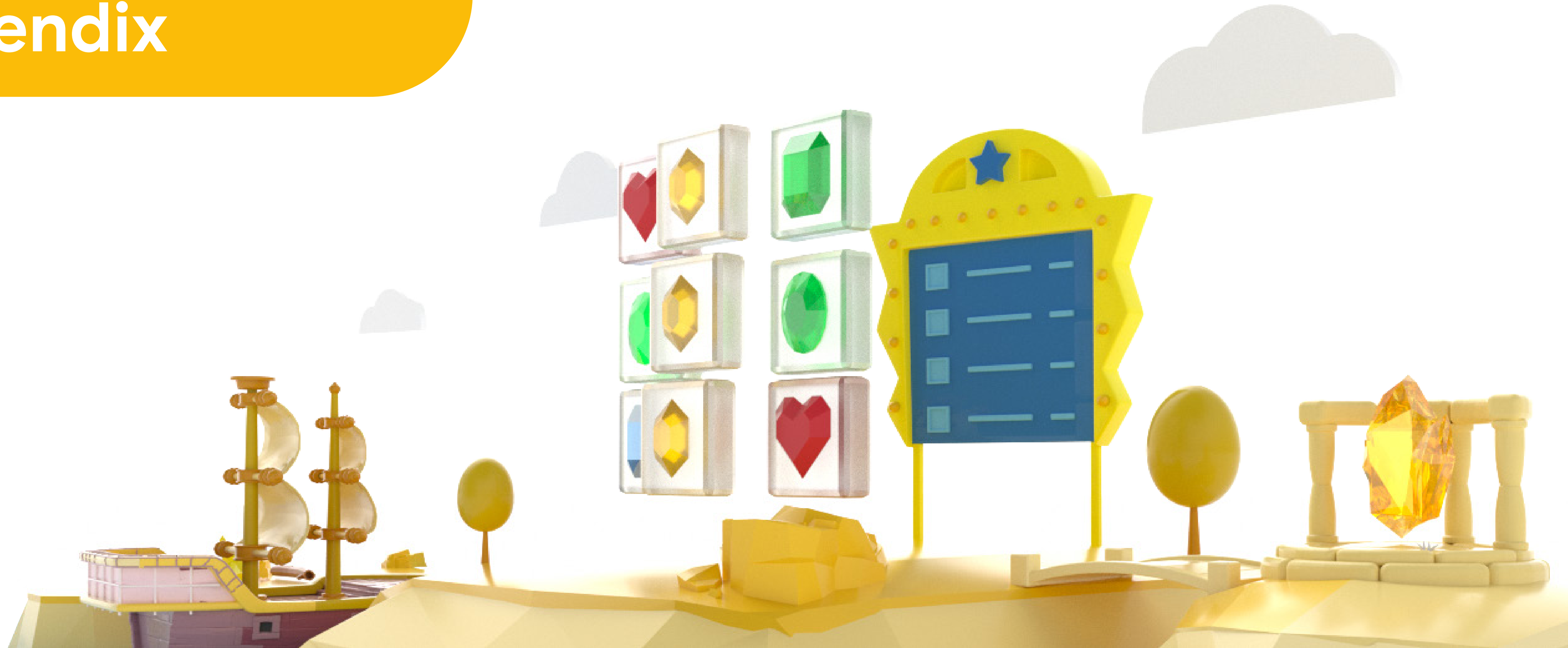


Motivate lapsed gamers to return by providing exclusive welcome back gifts and missions to show they are being cared about

“What will make you restart playing a mobile game that you had been playing but then quit?”



Methodology & Appendix



Methodology & Definitions

Methodology

Survey methodology:

- Online self-completed survey
- 90 minutes online focus group discussions
- Mobile gamers' self-recorded videos

Fieldwork:

- Survey: April 2022 - June 2022
- Focus groups & self-recorded videos: June 2022 - July 2022

Target group:

- Survey: Respondents aged 16-54 from USA, Japan, South Korea, Germany, Brazil & Indonesia who have played games on mobile phones in the past 3 months
- Focus groups & self-recorded videos: Aged 16-45 subgenre mobile gamers

Sample size:

- Survey: 10,500 respondents across 6 countries/markets.
- Per country, 1900 for United States, Japan & Germany (1000 general mobile gamers, 900 subgenre gamers), 1600 for South Korea, Brazil & Indonesia (1000 general mobile gamers, 600 subgenre gamers)
- Focus groups: Respondents from USA & Japan who have played 4X SLG, Merge and Tycoon games in the past 3 months
- Self-recorded videos: 12 video recorders selected from focus groups. 6 for United States, 6 for Japan.

Definitions

General mobile gamers: Gamers who have played any games on a smartphone within past 3 months.

Subgenre mobile gamers: Gamers who have played any specific game titles of the game subgenres on a smartphone within the past 12 months. Game subgenres include 4X SLG, Tycoon & Merge.

More-time gamers: Gamers who have spent more hours per week on playing mobile games than 2021.

Same or less time gamers: Gamers who have spent same or less hours per week on playing mobile games than 2021.

Spenders: Gamers who have spent on mobile games within past 3 months. Spending money includes gifts, downloadable content, subscriptions, and other micro-transactions.

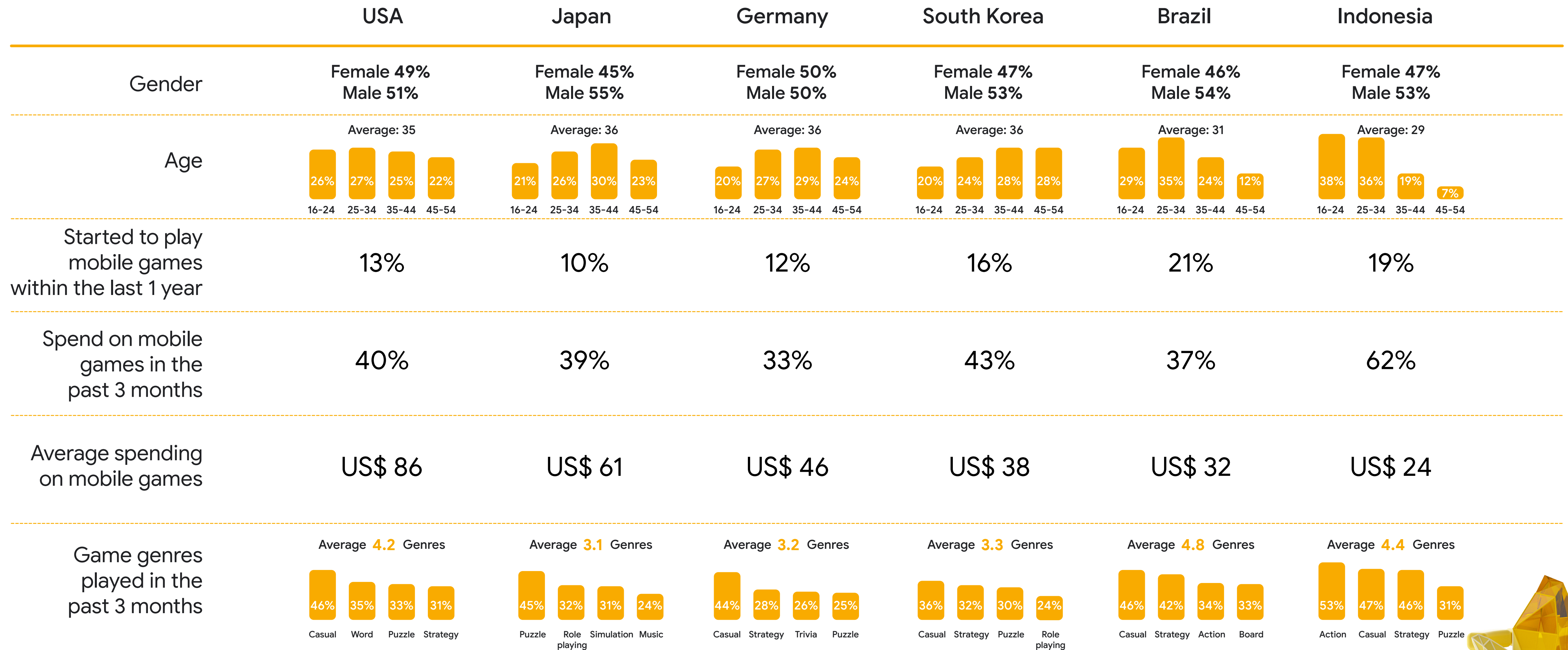
New gamers: Gamers who have started playing subgenre mobile games within 1 year.

Experienced gamers: Gamers who have started playing playing subgenre mobile games more than 1 year ago.

Cross-device gamers: Mobile gamers who have also played on any other gaming device than smartphone, including tablet, PC (downloaded or boxed games on desktop/laptop, emulators on desktop/laptop, cloud gaming service), game console (Xbox, Nintendo Switch / DS, Nintendo Wii, PlayStation, Arcade game machines).



Mobile Gamer Profile from Each Market



Expected 4X SLG themes differ greatly from market-to-market, but with war/military the most popular overall

 Top 5 Expected **4X SLG** Game Themes per Market

USA	
World war	46%
Zombie	40%
Military	39%
Medieval	38%
Apocalyptic / Sci-fi	34%

Japan	
Western fantasy	35%
Military	34%
Sci-fi	31%
World war	30%
Zombie	30%

Germany	
Medieval	34%
Sci-fi	30%
Zombie	29%
Three kingdoms	27%
Military	24%

South Korea	
Three kingdoms	37%
Military	35%
World war	33%
Medieval	25%
Western fantasy	22%

Brazil	
Medieval	46%
Sci-fi	43%
Zombie	42%
World war	40%
Military / Western fantasy	32%

Indonesia	
World war	50%
Military	44%
Three kingdoms	44%
Medieval	40%
Zombie	38%



City & farm are the most popular Tycoon themes

 Top 5 Expected **Tycoon** Game Themes per Market

USA	
City building	51%
Farm	47%
Garden / Flower	45%
Fairy tale	44%
Dragon / Animals	43%

Japan	
City building	53%
Garden / Flower	41%
Farm	35%
Fashion	31%
Home cleaning & decor	29%

Germany	
Farm	42%
City building	41%
Garden / Flower	38%
Detective / Adventure	36%
Restaurant / Hotel / Island / Tropical jungle	35%

South Korea	
City building	40%
Restaurant / Hotel	35%
Farm	33%
Home cleaning & decor	33%
Garden / Flower	32%

Brazil	
City building	61%
Farm	57%
Detective / Adventure	51%
Medieval fantasy	48%
Restaurant / Hotel	47%

Indonesia	
City building	59%
Farm	57%
Detective / Adventure	55%
Island / Tropical jungle	54%
Garden / Flower	51%



City, garden / flower, & restaurant / café are the top 3 expected Merge themes, with casino a unique theme for US gamers & zoo the #1 theme for German gamers



Top 5 Expected Merge Game Themes per Market

USA	
Garden / Flower	30%
Restaurant / Café	29%
City building	25%
Casino	25%
Farm	24%

Japan	
City building	41%
Garden / Flower	31%
Farm	30%
Zoo	27%
Restaurant / Café	26%

Germany	
Zoo	32%
Restaurant / Café	29%
Garden / Flower	26%
Farm	26%
City building	24%



Google for Games

