Competitor Analysis

Endless Runners

Introduction

Endless Runners is a well-established game genre, trendy on mobile devices. In this document are analyzed mechanics and market performances of 3 endless runners that survived the test of time highlighting why they work, and which are their most successful elements.

After a short mechanical analysis focusing on interesting micro and macro mechanics that differentiate each game from the other, and elements that make people play longer and come back, will follow a market analysis of each game to comprehend the magnitude of their success on the 2 main mobile platforms.

The purpose of this document is to support the ideation process for designing an endless runner, isolating elements of success in popular endless runners as well as analyzing the current market status for the genre.

Competitor Mechanical Analysis

The main mechanics for the genre and peculiar mechanics of each chosen game are analyzed in this section.

Endless Runners Mechanics

Endless or **infinite runner** is a subgenre of platform game in which the player character runs for an infinite amount of time while avoiding obstacles.

The player's **short-term objective** is to reach a high score by surviving for as long as possible. **Long-term objectives** are macro elements designed to keep players engaged and encourage them to return like completing collections or events.

Endless Runners can be side-scrolling, top-down, or 3D, the player is placed in a never ending level in which, most of the time, the character automatically moves forward. Some form of points, currency, or other rewards are gained over time by maneuvering in the level or simply staying alive longer. Controls are simple and intuitive but the game's difficulty gradually rises in difficulty as you play.

Endless Runners often opt for a **free-to-play mode**l for this reason they frequently use **monetization strategies** such as Fast-track progress, credit to extend the run, customization or unlocking of new main characters, and advertisement.

Subway Surfers

Co-developed by Kiloo and SYBO Games, Subway Surfers established itself as one of the most popular endless runners on both the App Store and Google Play thanks to its micro and macro balance and continuous support, acquisition, and high attention to market visibility.

https://www.igdb.com/games/subway-surfers-4d6fcdcb-3efb-487f-b301-53027dd10500

Micros

Subway Surfers uses a really simple 3D endless runner formula, without too much innovation. The verticality in the game gives a nice twist to the game. Players can jump on top of trains, or jump higher with power-ups as well as fly way above the main track with the jetpack. Tracks are full of **collectibles** of various types: coins, power-ups, mystery boxes, event collectibles, and so on, keeping gameplay interesting and pushing players to try to collect as many shiny things as possible.

Unfortunately, players are **not rewarded for collectible combos**, after getting all coins from a group of coins on the track player doesn't receive any positive feedback other than the coins themselves. Also is not possible for players to collect all the coins they see on the track due to their position, resulting in frustration and devaluation of the effective coins' value.

There are some Power-ups in the game but they don't feel significant enough, except for the magnet.

Macros

Macros are one of the success factors in the game and are what keep players playing and coming back. Players can complete missions, objectives, and achievements to obtain multiplicators to increase their score faster during runs. There are daily access rewards, limited-time events, avatar, and boards customization. The game also changes very often, with new tracks set in various famous cities in the world, attracting new players and old players

to come and try the new track. **The game constantly rewards players** for everything they do, leaving them with a feeling of **accomplishment**.

Meta and Community

Endless Runners generally have a very weak meta component, Subway Surfer seems to elude this weakness thanks to platforms like TikTok. Subway Surfers gameplay recordings are often used in split-screen videos to keep people engaged with the video, bringing unsolicited popularity to the game.

Monetization and Ads

Monetization strategies **don't feel unfair for non-paying players**, consisting mostly of avatar customization and boosting progress.

Ads aren't invasive, they are optional most of the time and offer in-game rewards after watching them like currency both soft and premium, restart, and continue.

Zombie Tsunami

Zombie Tsunami is a side-scrolling endless runner developed by Mobigame where players must grow their zombie horde to get points and overwhelm any obstacle on their path.

https://www.igdb.com/games/zombie-tsunami

Micros

Differently from Subway Surfers, in Zombie Tsunami **players have access to combos**, collecting all coins in a group will reward players with a nice "Perfect!" and some bonus coins consisting of nice **positive feedback and skill-building**.

During runs, by eating citizens on their way players can increase their zombie horde, the horde visually increases and the UI shows the number of zombies in the horde, this information corresponds also to the number of hits a player can take, every hit will kill a zombie until all zombies are dead and the run's over. This **mistake mitigation mechanic** feels good and well-blended with the theme also opening the game to **strategic choices** like tanking some hits to collect all from a group for example.

Power-ups are crazy, and change the gameplay enough to feel significant but some of them are redundant.

Although is an understandable design choice for balance, **controlling a big horde is clanky and hard to do**. When reaching a certain number of zombies, the jump becomes messy, some zombies jump later, some lower than others, or too early on track, combining this with the growing speed results in an **inevitable and frustrating death** and loss for the player due to unresponsive controls rather than player's errors.

Macros

Eating citizens during runs will also reward players with brains at the end of the run, these brains will fill a card giving a visual representation of progress, and once the card is filled players have access to a **scratch card** that has to be scratched and rewarded with currency, items, or bonuses. Scratch cards are satisfying to scratch and **disguise a simple reward system with a mini-game**.

Power ups' upgrades are meaningful, upgrades are visible, and have a huge impact on the power-up performance. For example one of the power-ups is "Ninja", all zombies in the horde become ninjas and can double jump, after the first upgrade they can also throw shurikens at obstacles destroying them.

https://www.igdb.com/games/zombie-tsunami

Lastly, zombies can be customized with hats (is pretty funny to see your whole zombie horde wear a horse mask).

Community

The game has a "Friends" feature to add your friends and keep track of high scores as well as a feature to have them appear in the player's gameplay as citizens to be added to the player's zombie horde.

Monetization and Ads

Zombie Tsunami uses the standard monetization formula with most of the things that can be bought with soft currency and premium currency used to make progress faster, continue levels, and get other premium fair bonuses.

The most interesting purchase is the "Remove Ads" feature since ads in the game are frequent with one at the end of almost every run, in addition to those to watch for optional bonuses, which is frustrating.

Crossy Road

Endless Runners is a genre that appeals to younger players, Crossy Road, developed by Hipster Whale, has the clear intent to **appeal also to a wider and older player group**, opting for a vintage 3D Bit art style and taking core mechanics directly from the 80' Arcade gem: Frogger.

https://www.igdb.com/games/crossy-road
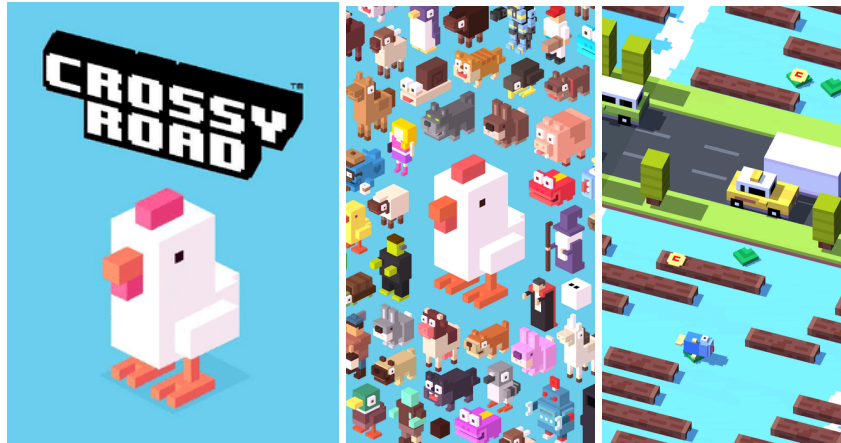
Micros

The notable mechanic that differentiates Crossy Roads from other endless runners is the **absence of the auto-run feature**, players need to move the character by tapping on the screen to move it forward or swiping to move it in other directions, **adding a layer of control and strategy**, while the screen slowly moves forward suggesting a sense of urgency. This formula results in a **much harder gam**e in comparison to other endless runners.

Crossy Road is simple in its design and doesn't provide players with power-ups, speed boosts, or anything players usually see in Endless Runners, faithful to the Frogger formula.

Macros

Players can collect coins in various ways: during gameplay, watching ads, completing tasks, collecting gifts, and using legal currency.
These coins are used to access a **lottery machine** to get new characters, one of the main, purely aesthetic, features of the game. There are hundreds of characters in the game each full of personality, some special ones cause the entire map to change or will interact with objects on the map.

Daily challenges are special challenges where players compete against the world to win special characters.

Crossy Road results barren in macro components, without the presence of achievement, events, and other special collectibles the game focuses only on skill expression and pure gameplay to thrive.

Community

The game makes available for players a 2-player mode where players can "cross the road" together challenging each other on who goes further.
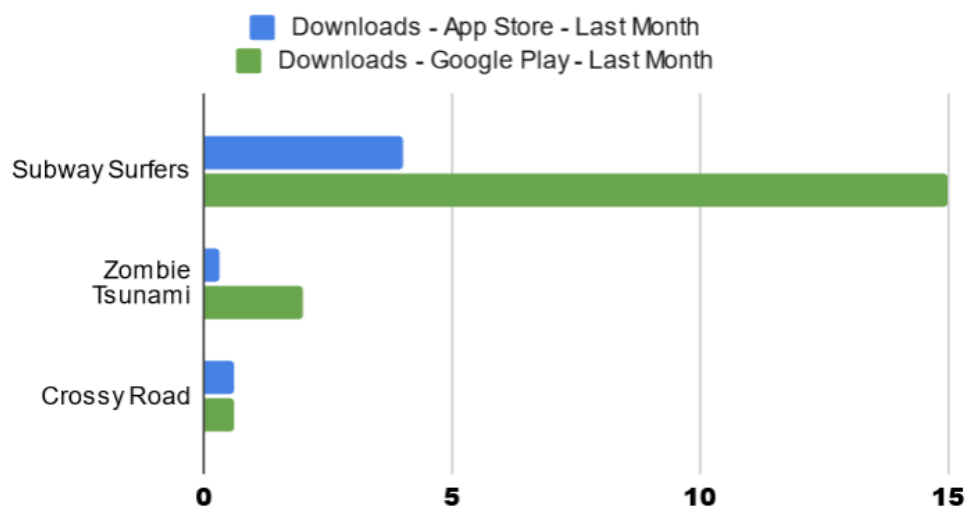
Monetization and Ads

Nothing of notice for monetization and ads. The game uses ads sometimes between one gameplay and another and players can buy "Remove Ads" to remove ads from the game. Players can also spend legal money to buy in-game currency to boost their character acquisition.

# Competitor Market Analysis and Comparisons

Following are some graphs that represent a comparison between various market aspects of the previous 3 games.


This first graph shows the download comparison between the 3 titles on the 2 main stores, showing a very high difference both between titles downloads, with Subway Surfer reaching 15 Million downloads on Google Play in the last month and between platforms with Google Play downloads being more than triple the AppStore's downloads, showing a preference in mobile gaming for the Android devices. Similar results can be observed in the next graph representing the active user comparison (million).
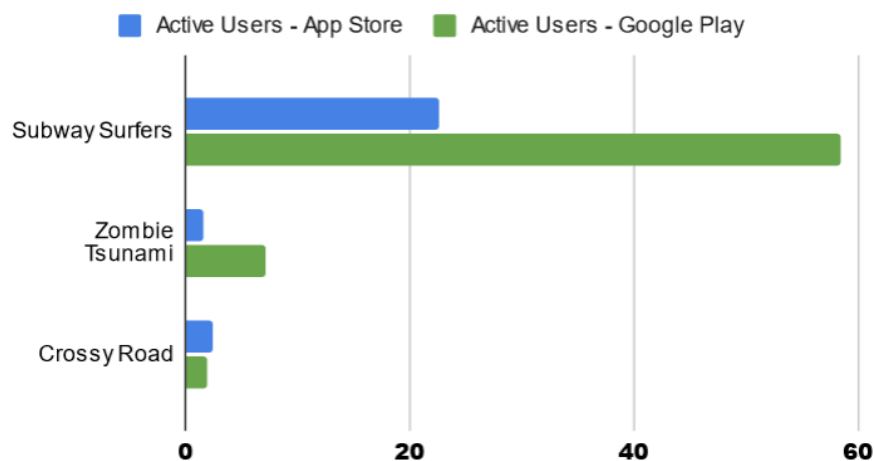
Platforms Revenue comparison

■ Revenue - App Store- Last Month ($)
■ Revenue Google Play - Last Month ($)
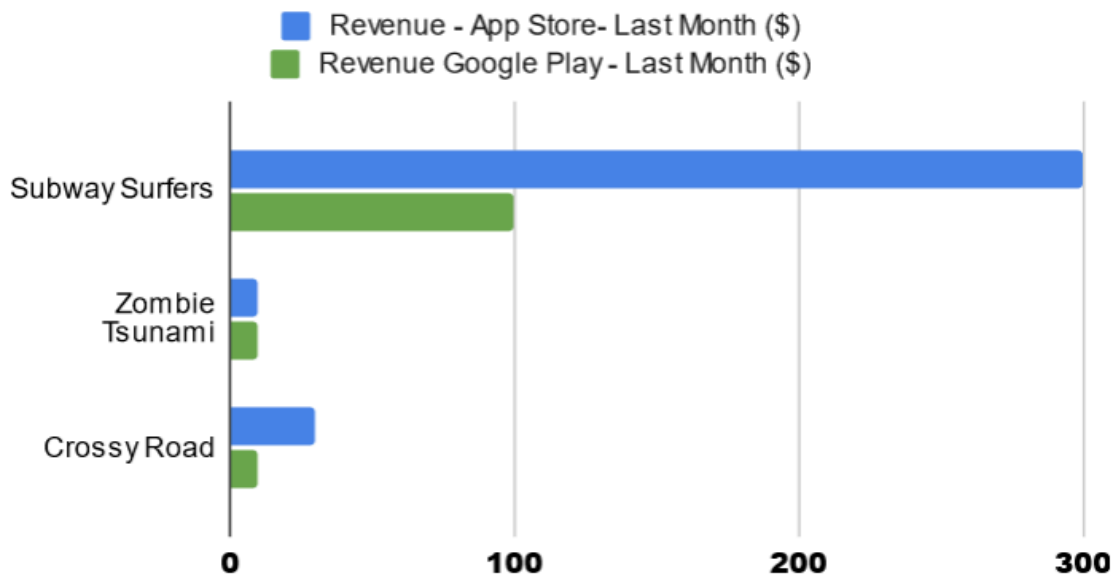
Opposite results can be observed in this revenue (thousands) comparison graph where the AppStore registers way more revenue than its counterpart. The 3 games taken into comparison are free to play meaning that these revenue results come from ads and in-game purchases, if we consider previous Active Users' results, is deducible that a large part of players spend money on AppStore while a very small part of players spend money on Google Play.

Platforms Reviews comparison

■ Reviews - App Store   ■ Reviews - Google Play
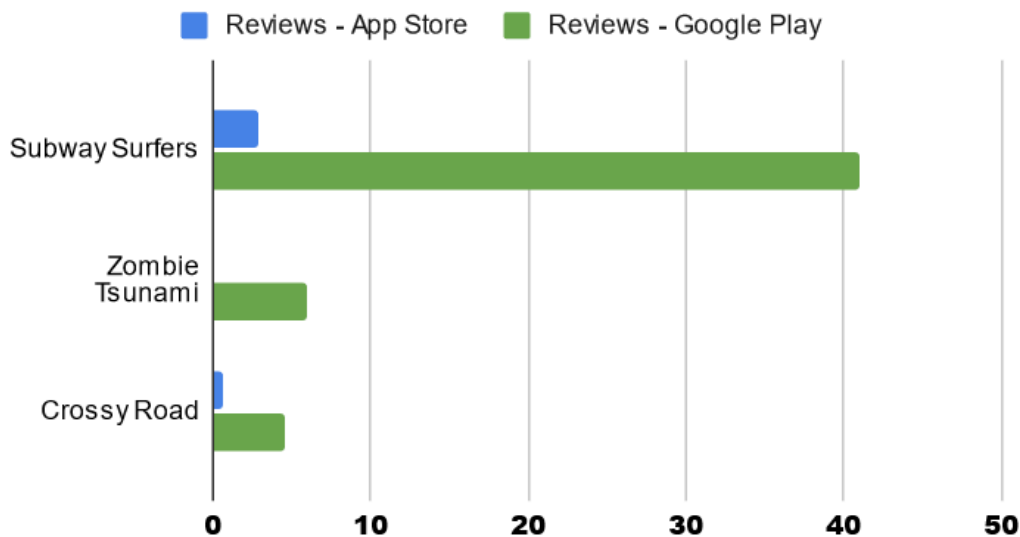
This last graph shows that Android players also engage more with reviews (million), towering over Apple by huge amounts.

Conclusion

This document points to various elements of interest for the **development of a good endless runner**. For each game, only interesting mechanics and features as well as mechanics and features to avoid are analyzed. These games offer much more but other elements are often shared with all endless runners, and these elements are not reported in this document.

Looking at the market analysis section is clear how Subway Surfer outmatched the other 2 titles, suggesting that its formula is the **most profitable and successful one**. **Focusing heavily on Macro gameplay** will enrich the otherwise endless runners' simple and repetitive gameplay, Subway Surfer succeeds in this, constantly fueling its game with new events, daily missions, new looks for the game, and so on, and rarely things change on a micro level.

From the analysis Zombie Tsunami and Crossy Road are superior when it comes to micro gameplay, being more innovative to the genre or offering more meaningful choices, but the lack of macro gameplay is the reason why they are so far behind Subway Surfer.

Subway Surfer also pushes hard to stay on the top of charts, assuring constant **visibility** and **user acquisition**, with of course a bit of luck coming from TikTok trends.

In conclusion, these 3 games are more than 10 years old and still manage to perform well although the endless runner game genre is in decline, meaning that they all are to be taken as examples for their clever design, polish, attention to detail, and dedication.