



2022

Casual Gaming Apps Report

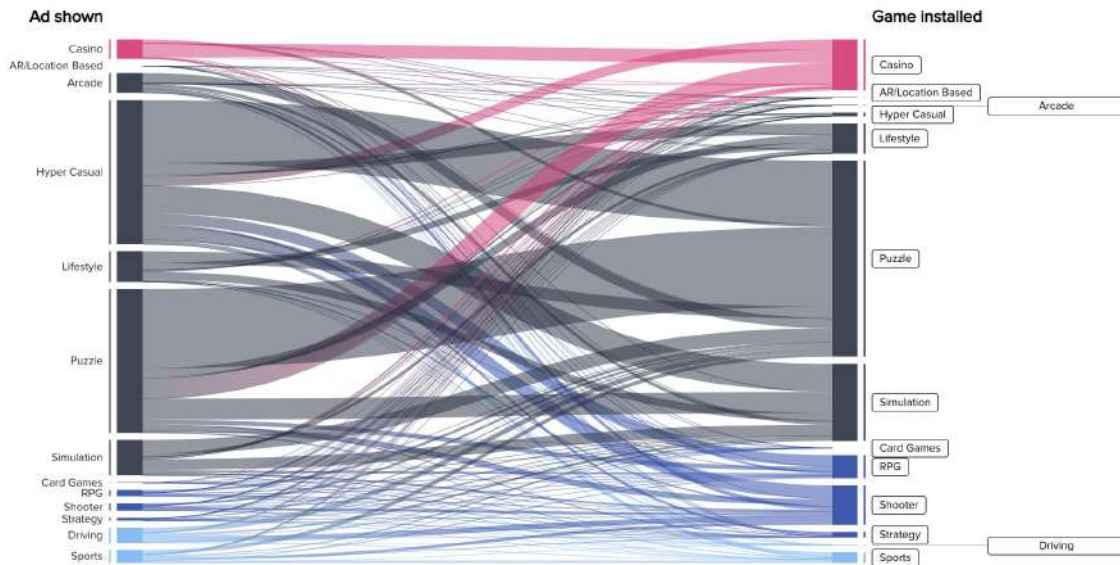
Unlocking the Secrets of the
Most Popular Genre



Where do your installs come from?

Our newest tool helps you find out by providing an aggregate view of the sources of installs across different casual gaming categories and genres.

Check out our new tool



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Introduction

In recent years, pandemic-driven demand led to **record-breaking levels of spending** in mobile games. Consumers worldwide coped with lockdowns by playing their favorite casual games. However, as policies shifted, **user spending on mobile games dropped** year-over-year for the first time in Q1 2022—down from the pandemic-driven spend peak of \$22.6 billion in Q1 2021.

Despite a market correction in the industry, mobile gaming increased its market share to over 60% of the gaming industry. Mobile is now 3.3x larger than its closest competitor, home console gaming. The **casual gaming sector is also projected to grow steadily**, retaining its place as the mobile gaming genre made for everyone.

As the mobile gaming industry continues to scale, marketers need new models, metrics, and methods to keep their game portfolios thriving today and tomorrow. We've compiled insights from data based on more than 58 million installs to help marketers capitalize on new opportunities.

The 2022 Liftoff Casual Gaming Apps Report includes an analysis of CPI, ROAS, and ad completion rates across the genre. The report also includes insights from **Mobile Heroes** at Jam City, Socialpoint, and Wooga who are at the top of their game in the casual gaming sector.

Report Highlights



User Acquisition

In the past year, the average cost per install (CPI) for casual games was \$1.10. Simulation players cost the least to acquire, at \$0.91 each.



Platform Trends

Post ATT, CPI on iOS (\$2.27) was 2x that of Android (\$0.75). Android and iOS users had similar D7 and D30 ROAS.



Return on Ad Spend (ROAS)

D7 and D30 ROAS stayed steady month-over-month between 2021 and 2022. Over 12 months, D7 and D30 ROAS averaged 7.31% and 17.81%, respectively.



Regional Trends

APAC and LATAM provide great value with CPIs of less than \$1. ROAS is about the same across all regions except LATAM.

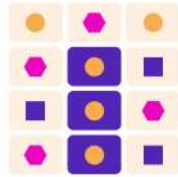
How we define casual game genres

The report is split into three of the biggest casual gaming genres:



Lifestyle

Lifestyle games include interactive stories (such as *Lovelink*), home customization and dress-up titles (with famous examples including *Design Home* and *Covet Fashion*), as well as rhythm and music games.



Puzzle

Puzzles are a wide-ranging genre. A mainstay, match-3, remains one of the most popular. Also included are Solitaire and Hidden Object (think *June's Journey*). Other notable game types, such as Word games (like *Words With Friends*), Coloring games, and trivia titles, make up the rest of the category.



Simulation

From adventures abroad to creating new cities, simulation includes anything that puts the player in charge of building an empire. Popular titles of the genre include *Rollercoaster Tycoon*, *Cooking Diary*, and—for animal lovers—a range of virtual pet sims.

UA, ROAS and Ad Completion Benchmarks

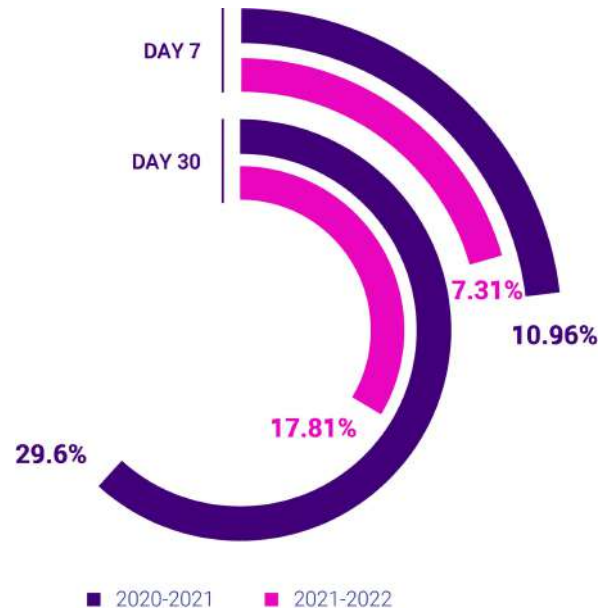
Tallying up the challenges and rewards
of mobile marketing

From 2021 to 2022, average CPI across casual games hit \$1.10. Meanwhile, ROAS rates averaged 7.31% at Day 7 and 17.81% at Day 30.

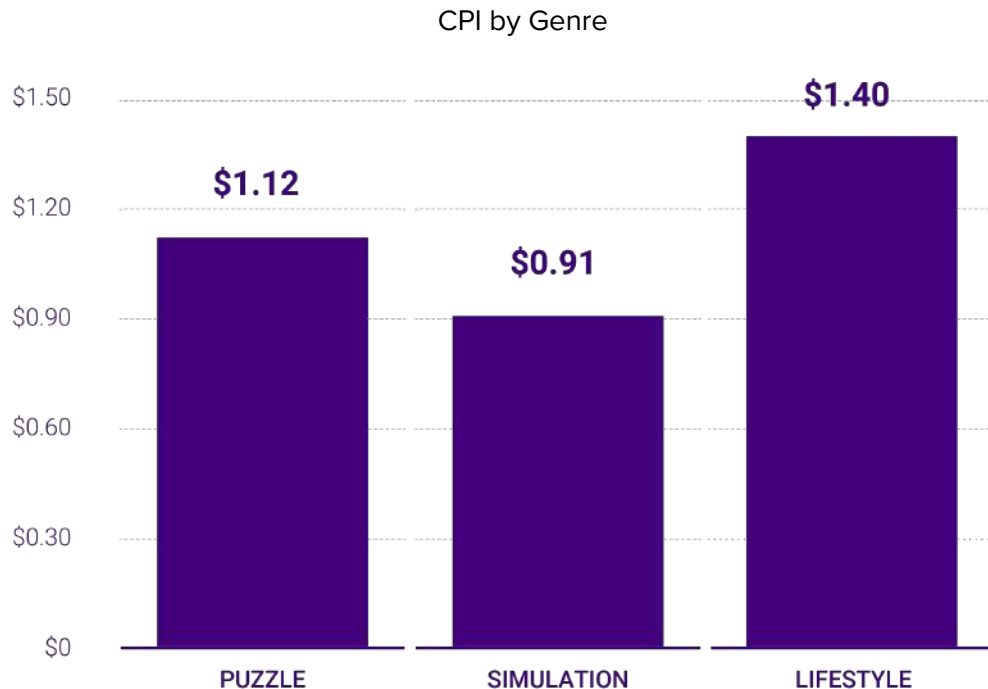
CPI, 2020 to 2022



D7 and D30 ROAS, 2020 to 2022

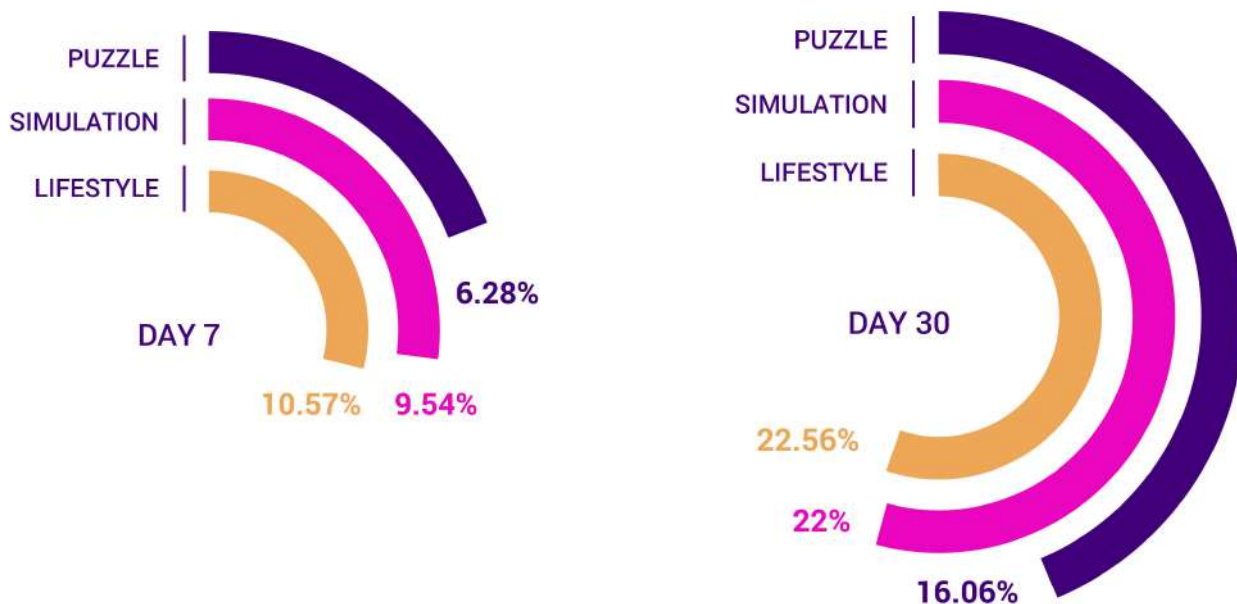


With a CPI of \$0.91, Simulation players cost the least to acquire. Puzzle players offer the next best value at \$1.12 per install.



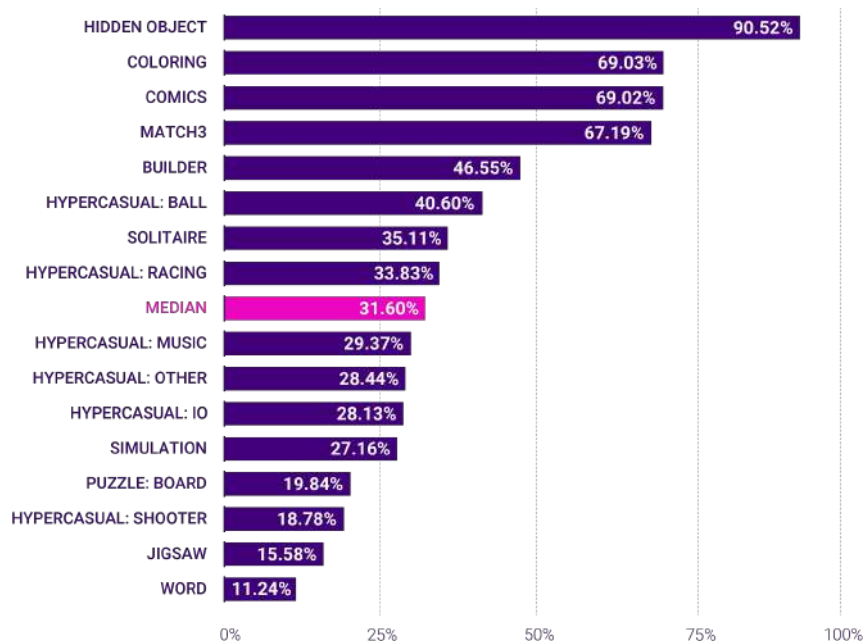
Lifestyle games may have the highest CPI, but they also post the highest returns, with ROAS rates at 10.57% on Day 7 and 22.56% on Day 30.

ROAS by Genre



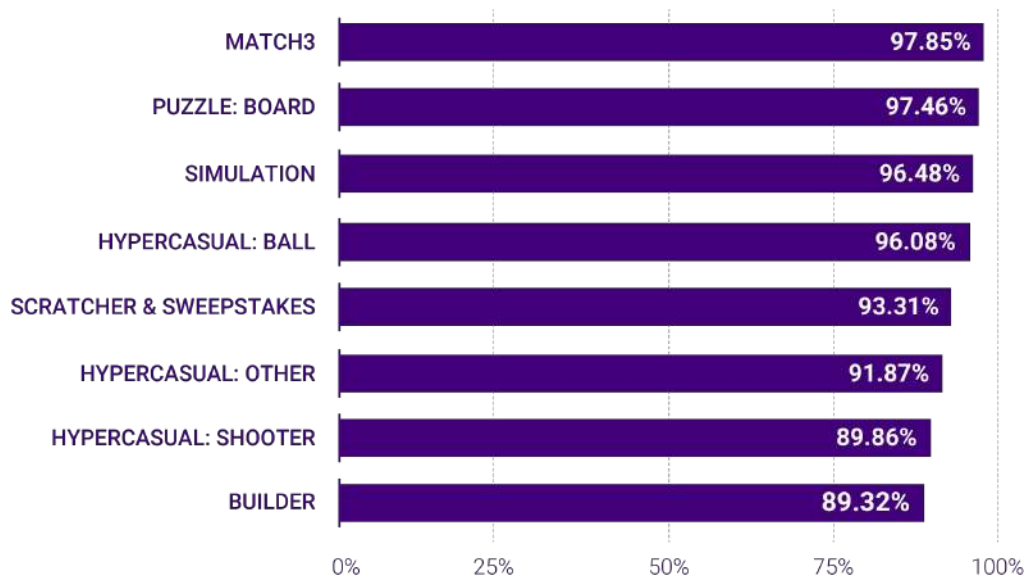
Over 90% of users watch video ads for Hidden Object games to completion, a nearly 60 percentage point difference from the median.

Video Ad Completion Rate by Genre



Rewarded video ads for puzzle and puzzle-adjacent casual games led the pack as the genres that saw the highest ad completion rates (97%+).

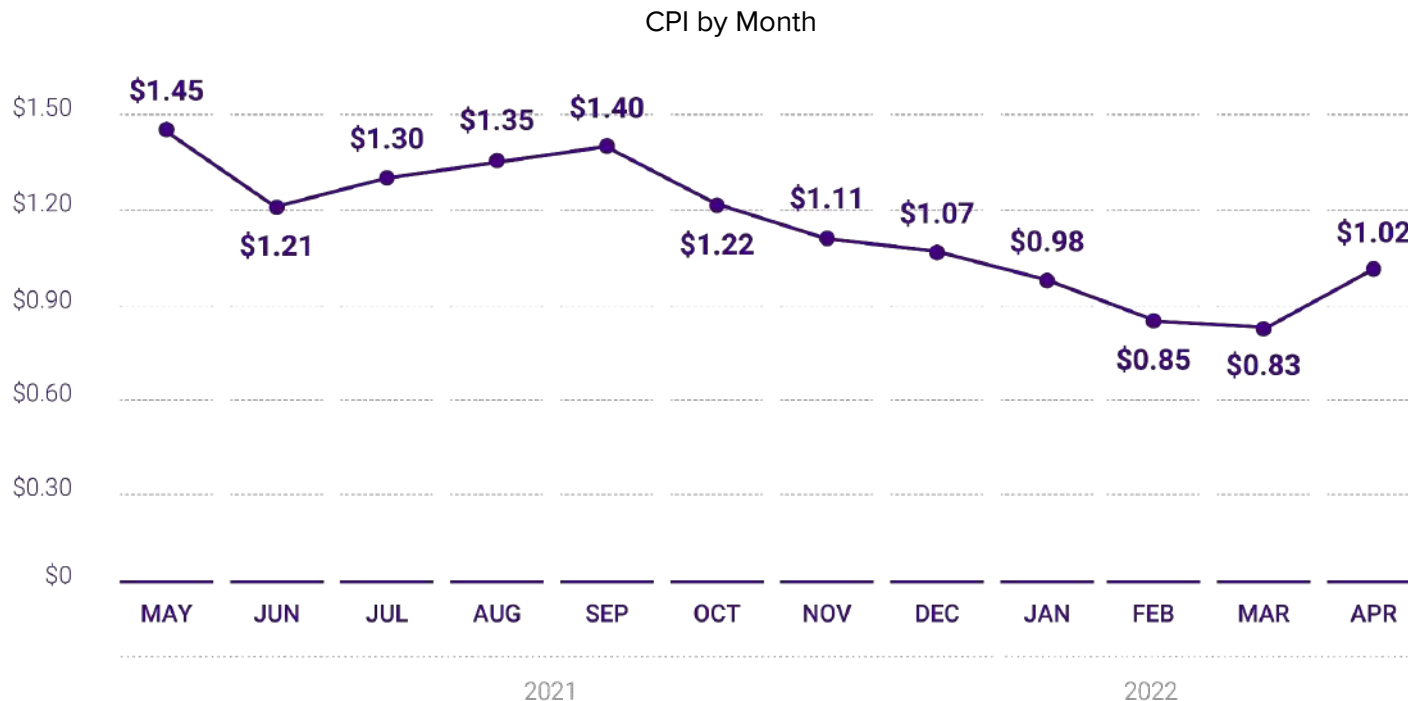
Rewarded Video Ad Completion Rate by Genre



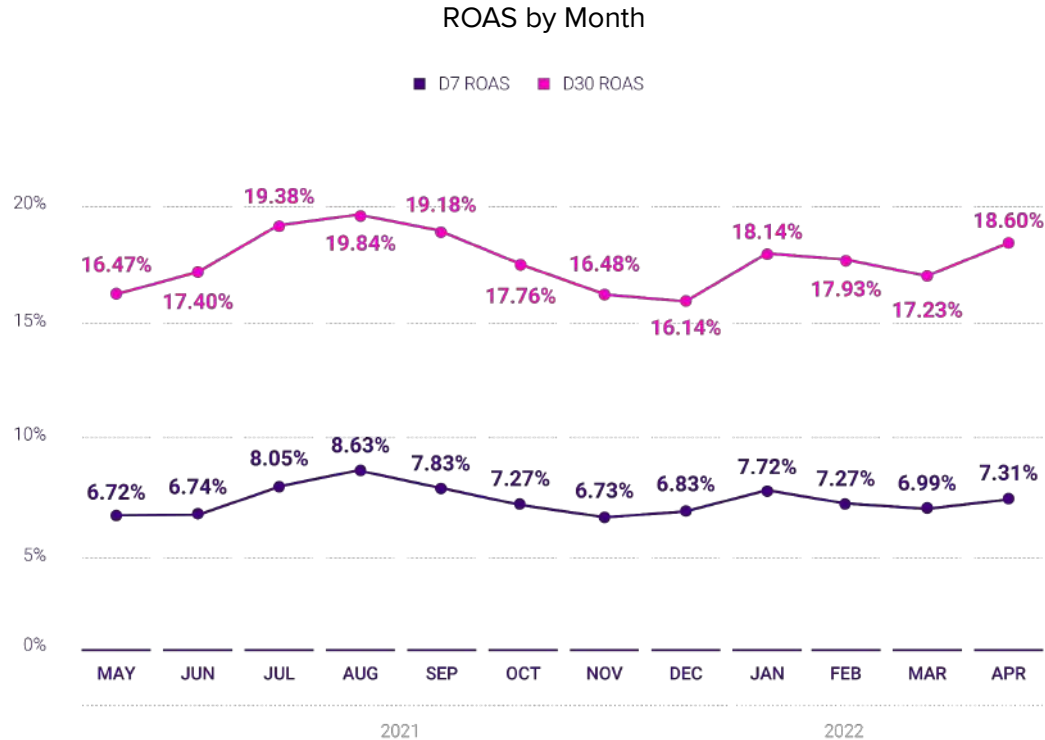
Monthly CPI and ROAS Trends

How can marketers get the most from their ad spend?

CPI fell post-ATT after peaking in May 2021 at \$1.45. Costs hit sub-\$1 levels in early 2022 before rebounding in April.



Both D7 and D30 ROAS rates stayed relatively steady, never rising or falling more than 3 percentage points.



“

It can be easy to get obsessed with vanity metrics like D1 retention and lose sight of the end goal. Even LTV and CPI can be superficial metrics. At the end of the day, it doesn't matter if I spend \$1 or \$10 per user if I'm reaching 100% profitability. People get really focused on these absolutes when the key is in the relative number, the actual return on investment of the game.

Danika Wilkinson
Head of Marketing, New Games



[Read the full interview](#)



Market Trends by GameRefinery

What do users want out of their gaming experiences?

What do all the top-grossing games have in common? They rely on elements that keep players invested.



A closer look at the superhits of casual gaming: Zen Match - Relaxing Puzzle



Zen Match - Relaxing Puzzle

Analyst's overview

Our analyst's key takeouts

Genre & Style

Zen Match is a mahjong style puzzle game where the **player matches puzzle tiles together on a mahjong-like board** but also allowing users to **design interior styles for rooms**. The game has relaxing audiovisuals and a realistic art style.

Features & Progression

- Players progress through **mahjong-style matching puzzles**
 - **Special daily mode levels**
- Collect **currency** from levels to **design Zen rooms**
- **Upgrade plants** by playing special daily mode levels
- Collect **decorative backgrounds**
- **Simple recurring events**
 - **Tournaments**

Monetization Examples

IAP

- **Consumable boosters** to help in completing levels
- **Players purchase continues** to retry a level
- **Purchase more lives** instead of waiting for refill
- **Piggy Bank**
- **Removing ads**
- **Battle Pass**
- **Limited-time offers**

Ads

- **Forced ads**
- **Banner ads**

A closer look at the superhits of casual gaming: Beatstar



Beatstar

Analyst's overview

Our analyst's key takeouts

Genre & Style

Beatstar is a sleek and simple three-laned rhythm game intended for phones. Gameplay includes long tiles and swipes.

All of the songs become progressively difficult: Beatstar tiles appear periodically in songs and mark a slight speed up and a bump in difficulty.

Features & Progression

- Players make progress by collecting star scores. **The scores build up and open up more features and rewards**
- New songs are acquired from **song boxes** which can be opened by collecting a set amount of box cards from gameplay. Boxes require more cards for every box opened for a genre
- There is a hidden session length mechanic in the unlock slots: once all slots are full (player has collected 3x350 Beatcoins) they can no longer play without watching an ad or making a purchase for Unlimited Play
- A **wide selection of songs from different genres**, players can also select their favorites from a Wishlist Box
- Hard and extreme songs available separately
- Highscore lists for local players and friends: when passing a friend's score, players can brag with emotes
 - Multiplayer competition events, each lasting 4-5 days
 - Two songs to choose from daily during the event period
 - 20-minute PvP battle for the best score for the chosen song, two free tries per challenge
 - Prize tokens given out based on rankings, used to spin the event prize wheel

A closer look at the superhits of casual gaming: Beatstar II



Beatstar

Monetization

IAP Examples

- Two options for Unlimited Play are offered in the shop when song case unlock slots are full
- A one-week subscription, including 50 gems purchasable with real money
- 30 minutes of Unlimited Play purchasable with 25 gems
- A refreshing shop for song boxes, limited-time song offers and bundles
- Gem packs
- Skip unlock time with gems
- Buying another try for multiplayer events
- Monthly Tour Pass events with varying themes:
 - Battle Pass with one premium tier: players gather pass points from normal gameplay and from Daily Shuffle (play two random songs from your library daily for double pass points)
 - Rewards include emotes for bragging, profile banners, random season songs, box cards, wishlist and rainbow cards
 - 30 tiers with varying rewards, after which each level grants bonus rewards if the pass has been purchased

Ad Placement Examples

- Ads will play after songs, after a mistake during a song
- Rewarded ads give five free gems in the shop after the daily free gems have been claimed
- Ads for box cards when finishing a song in regular gameplay and Daily Shuffle

“

At Wooga, we have the luxury of having great stories that our players are excited to continue to experience, so they stay engaged. Our games are developed with accumulated knowledge about our players. That's the number one anti-churn tactic: Know your players and deliver content relevant to them. We are listening to them in different ways, with the help of player surveys and audience research, figuring out what they actually want, and delivering on that.

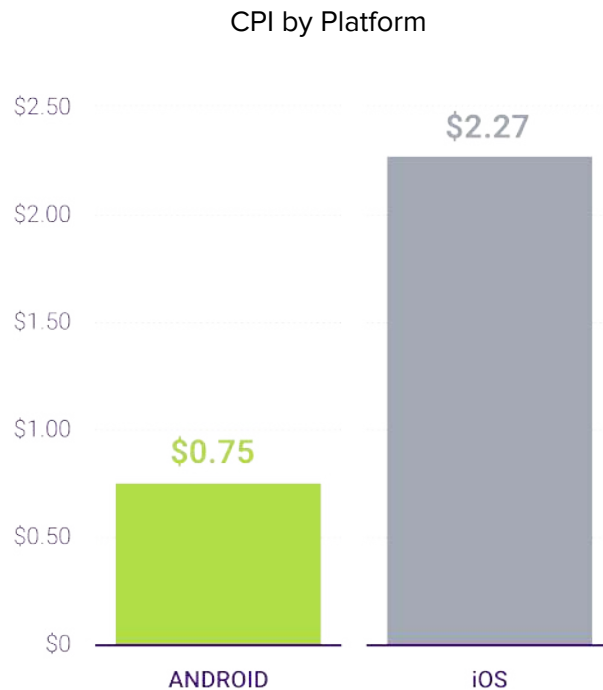
Melanie Zimmerman
Head of Marketing at Wooga



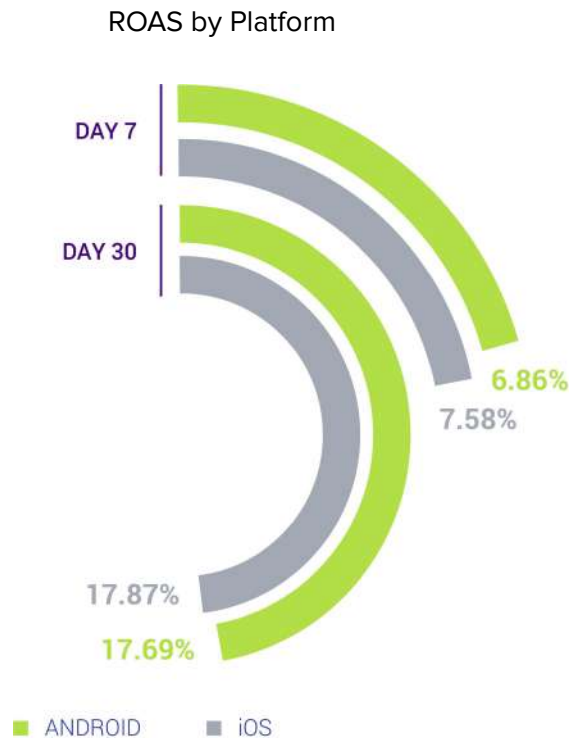
Android vs iOS

Which platform wins?

Post ATT, Android users cost less than half what it takes to acquire iOS players.



Android users exhibited similar D7 and D30 ROAS rates to iOS users, but they cost only \$0.75 on average to acquire.



“

A decade ago, it was hard to get lots of accurate data and then make sense of it. As privacy becomes essential, we once again have fewer data to work with. It's making creative and research much more significant to marketers because you have to make up for missing numbers with creativity.

Vinícius Gerez

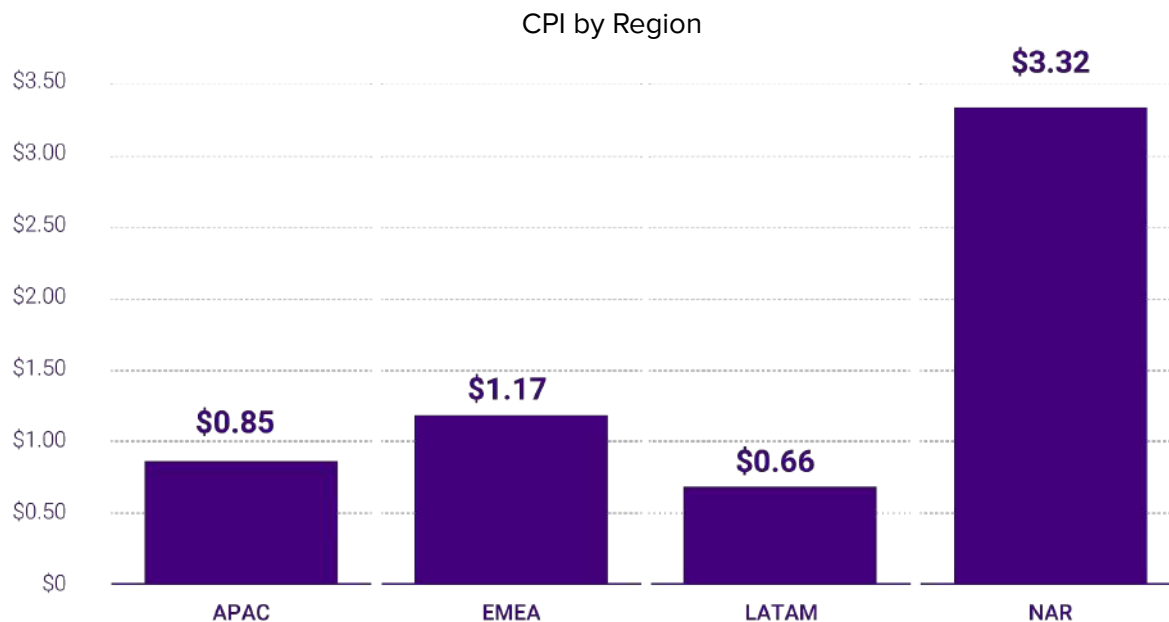
Principal User Acquisition Manager at Wooga



Regional Trends

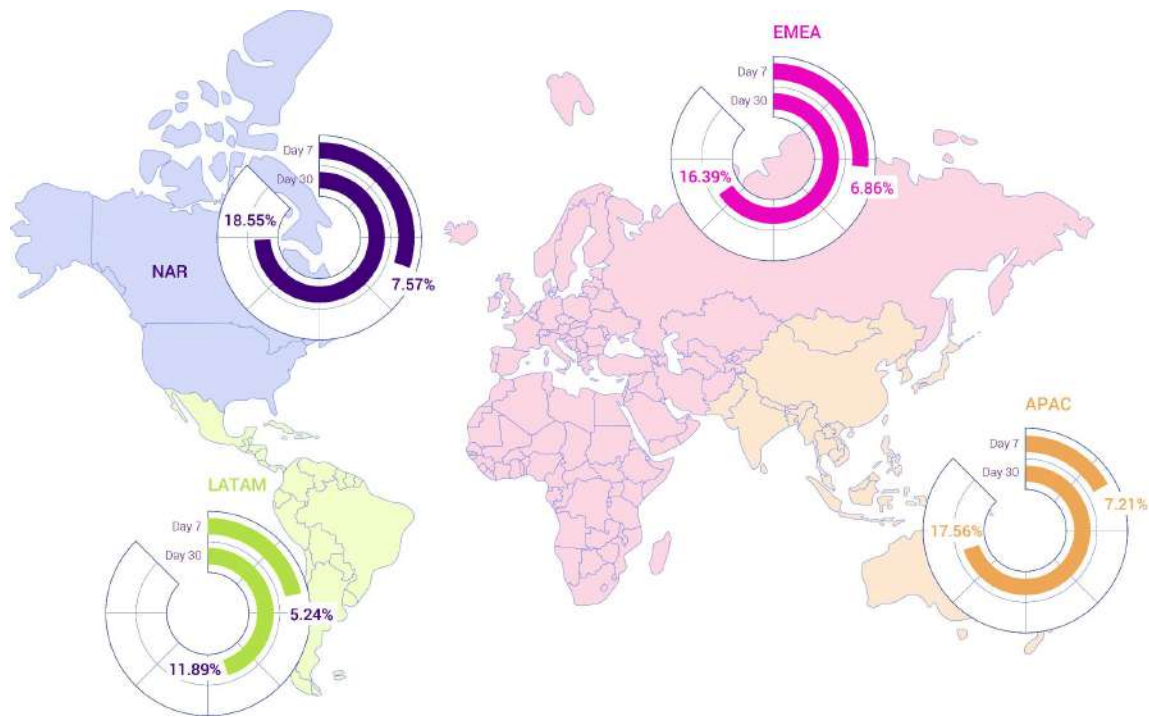
We're in a world of play, but how does performance compare?

With an average CPI of \$0.66, LATAM players are the most cost-effective. Casual game players in NAR cost more to acquire (\$3.32) than players in other regions.



APAC, EMEA, and NAR have comparable D7 and D30 ROAS rates. Meanwhile, LATAM posts lower rates in both categories.

ROAS by Region



“

Creative is a big lever. The industry has been around for a while and there are many outlets and channels we leverage. But, there's a lot of noise as well. Ultimately, creative is the first touchpoint. It's the first area where we connect and speak to the users — tell them what our product is, how we can appeal to them, what our value proposition is, and how to get them to the next part of the funnel.

Winnie Wen

Senior Director of User Acquisition at Jam City



Notes on the Report

Report Methodology

Liftoff Data Is Based on:



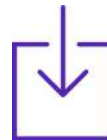
76.1 B

Impressions



3.4 B

Clicks



58.5 M

Installs

Date Range: 1st May 2021 – 1st May 2022



WHO IS LIFTOFF?

Liftoff is the leading growth acceleration platform for the mobile industry, helping advertisers, publishers and game developers scale revenue growth with solutions to market and monetize mobile apps.

With a suite of solutions including Vungle, JetFuel and GameRefinery, Liftoff supports over 6,600 mobile businesses across 74 countries, including gaming, social, finance, ecommerce, entertainment and more. Liftoff is proud to be a long-term partner to leading advertisers and app publishers since 2012. Headquartered in Redwood City, CA, Liftoff has a growing global presence with offices around the world.



liftoff.io



WHO IS GAMEREFINERY?

GameRefinery, a Liff company, 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, Wargaming, 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, understand why games are successful, and how to achieve the same from pre-production to LiveOps.



gamerefinery.com