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GameRefinery
A Liftoff Company
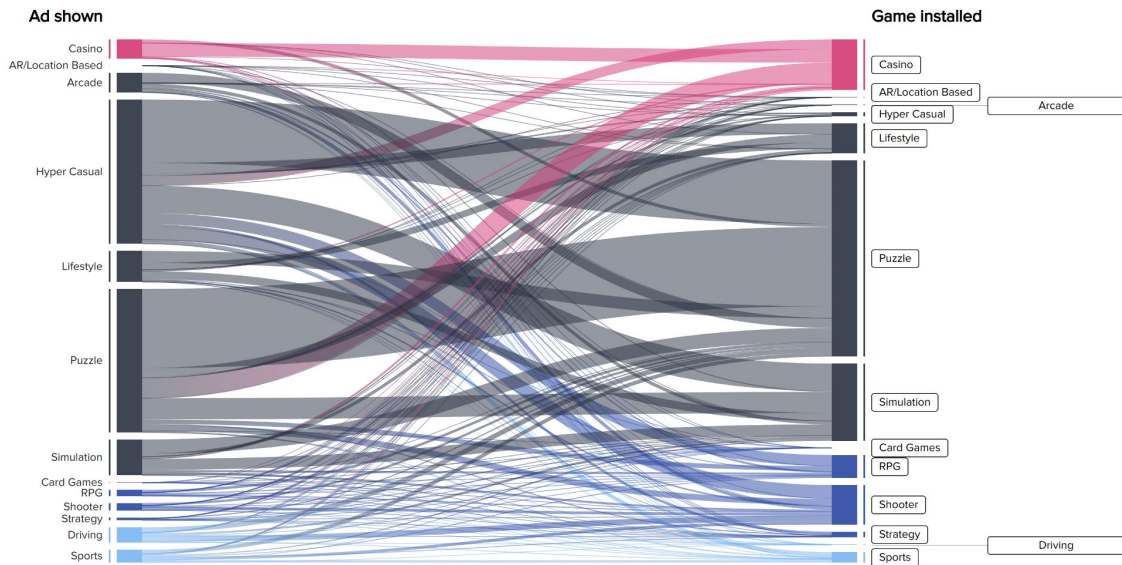
2022

Casual Gaming Apps Report

Unlocking the Secrets of the
Most Unpopular 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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Ad shown

Casino
AR/Location Based
Arcade
Hyper Casual
Lifestyle
Puzzle
Simulation
Card Games
RPG
Shooter
Strategy
Driving
Sports

Game installed

Casino
AR/Location Based
Hyper Casual
Lifestyle
Arcade
Puzzle
Simulation
Card Games
RPG
Shooter
Strategy
Sports
Driving

Contents

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.
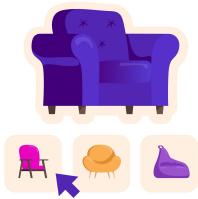
Regional Trends

APAC and LATAM provide great value with CPIs of less than $1. ROAS is about the same across all regions except LATAM.
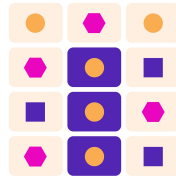
How we define casual game genres

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.
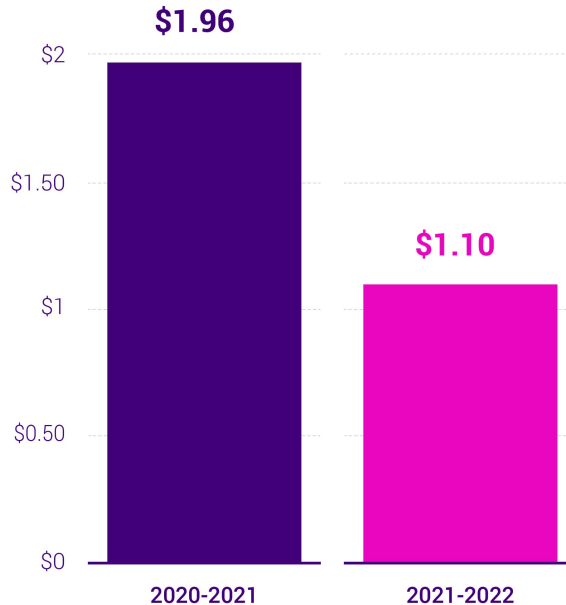
Simulation

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

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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

$1.96

$1.10

$2

$1.50

$1

$0.50

$0

2020-2021　　**2021-2022**

D7 and D30 ROAS, 2020 to 2022

DAY 7

DAY 30

7.31%

10.96%

17.81%

29.6%

■ 2020-2021　　■ 2021-2022

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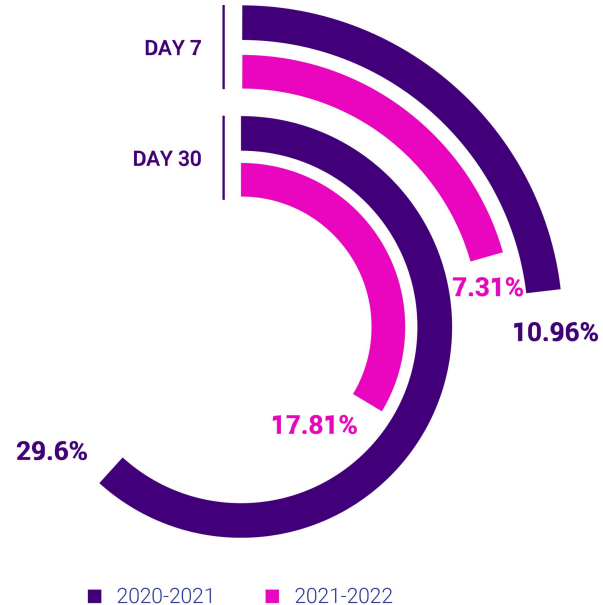
With a CPI of $0.91, Simulation players cost the least to acquire. Puzzle players offer the next best value at $1.12 per install.
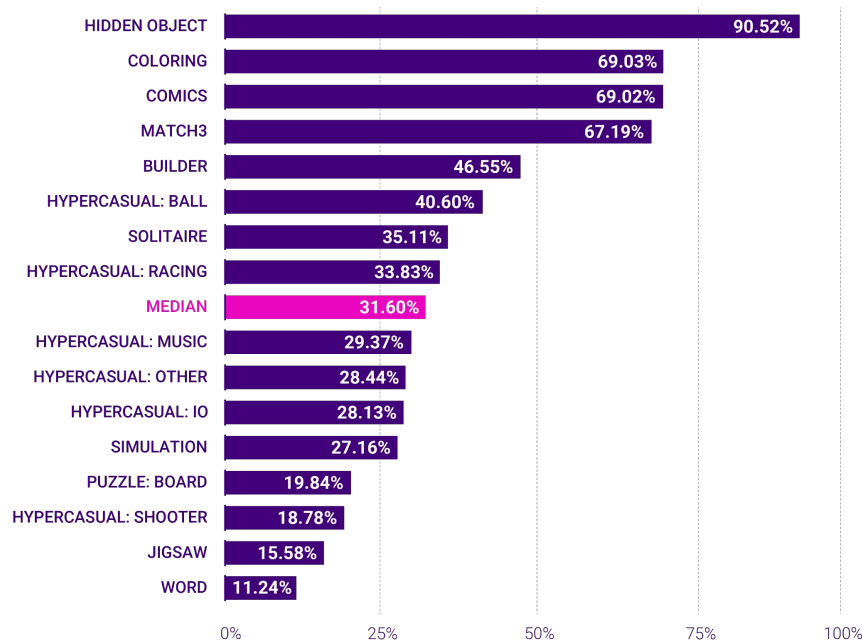
CPI by Genre

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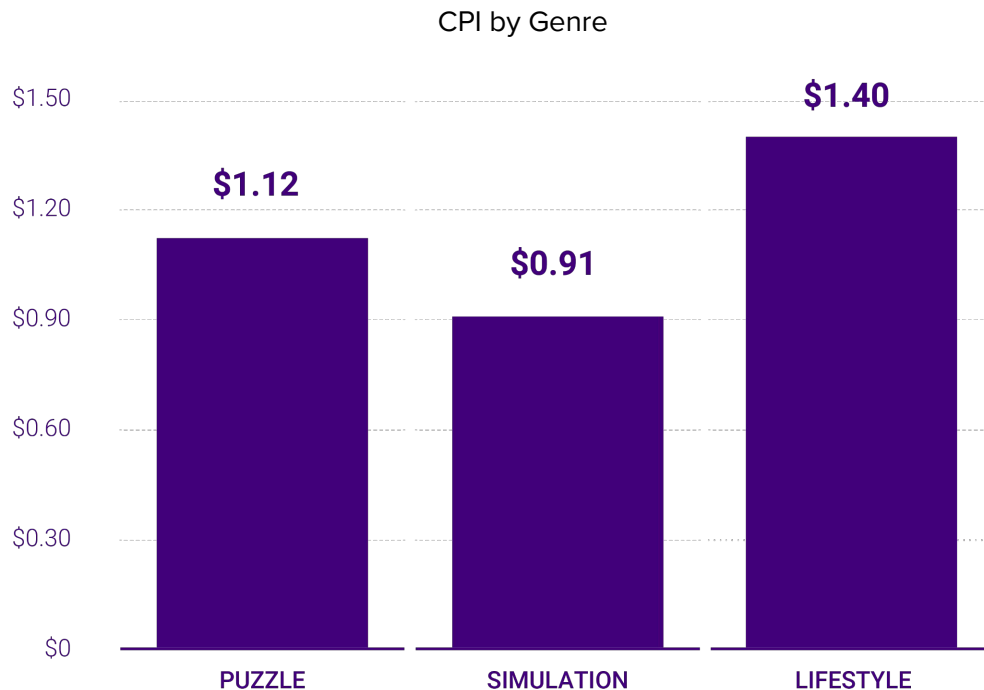
Lifestyle games may have the highest CPI, but they also post the highest returns, with ROAS rates at 10.57% on Day 7 and 22.56% on Day 30.

ROAS by Genre

PUZZLE

SIMULATION

LIFESTYLE

DAY 7

6.28%

10.57%   9.54%

PUZZLE

SIMULATION

LIFESTYLE

DAY 30

22.56%

22%

16.06%

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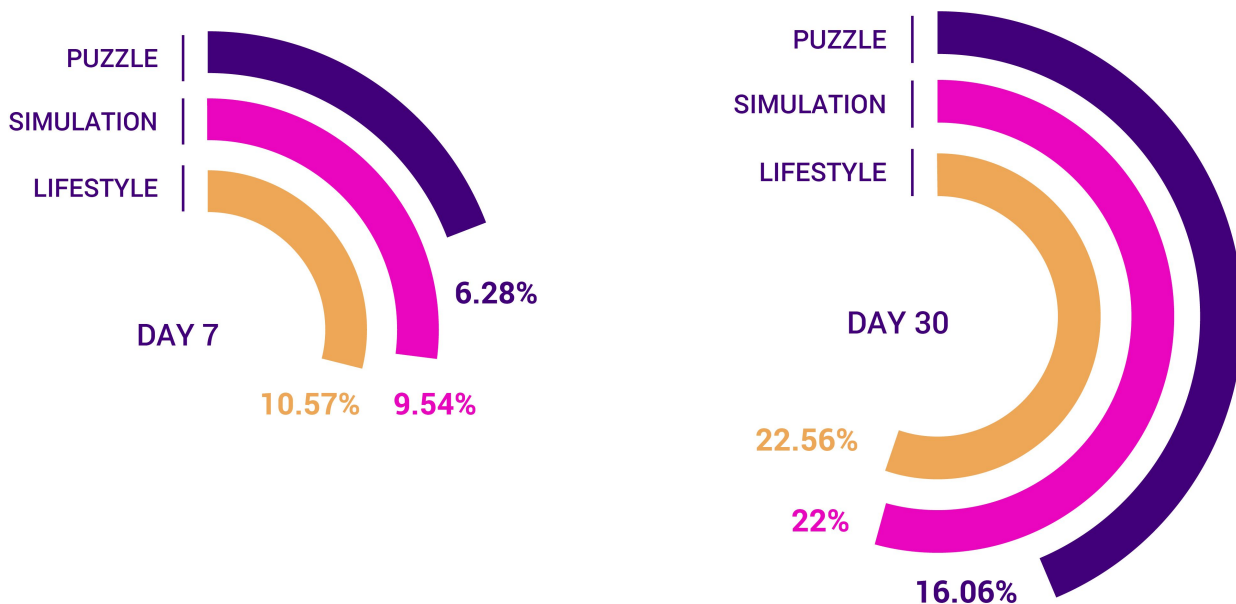
Over 90% of users watch video ads for Hidden Object games to completion, a nearly 60 percentage point difference from the median.

Video Ad Completion Rate by Genre

Genre	Rate
HIDDEN OBJECT	90.52%
COLORING	69.03%
COMICS	69.02%
MATCH3	67.19%
BUILDER	46.55%
HYPERCASUAL: BALL	40.60%
SOLITAIRE	35.11%
HYPERCASUAL: RACING	33.83%
MEDIAN	31.60%
HYPERCASUAL: MUSIC	29.37%
HYPERCASUAL: OTHER	28.44%
HYPERCASUAL: IO	28.13%
SIMULATION	27.16%
PUZZLE: BOARD	19.84%
HYPERCASUAL: SHOOTER	18.78%
JIGSAW	15.58%
WORD	11.24%

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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

Genre	Completion Rate
MATCH3	97.85%
PUZZLE: BOARD	97.46%
SIMULATION	96.48%
HYPERCASUAL: BALL	96.08%
SCRATCHER & SWEEPSTAKES	93.31%
HYPERCASUAL: OTHER	91.87%
HYPERCASUAL: SHOOTER	89.86%
BUILDER	89.32%

0% 25% 50% 75% 100%

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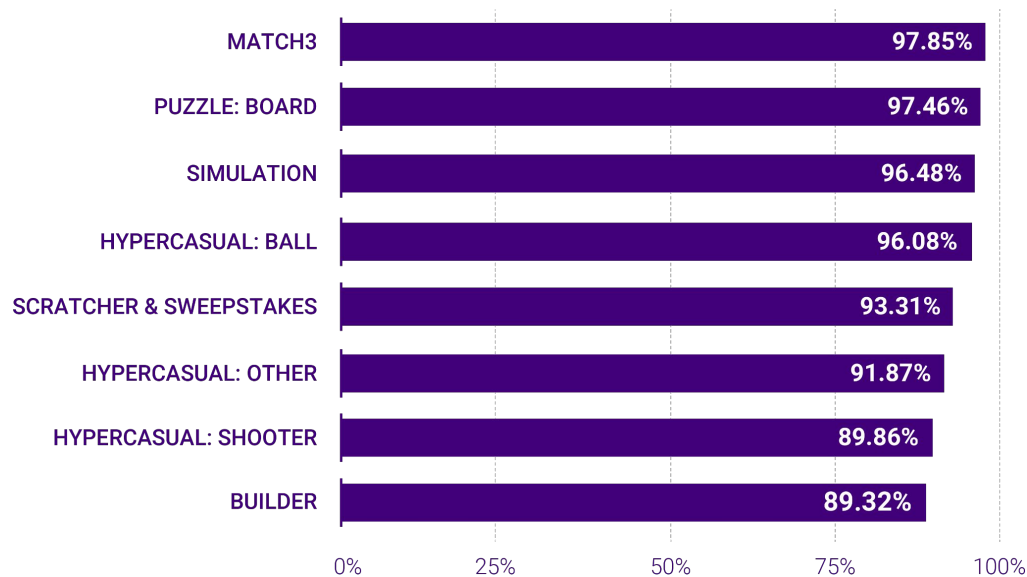
Monthly
CPI and ROAS Trends

How can marketers get the most from their ad spend?

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

CPI by Month

$1.45	$1.21	$1.30	$1.35	$1.40	$1.22	$1.11	$1.07	$0.98	$0.85	$0.83	$1.02
MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR

2021

2022

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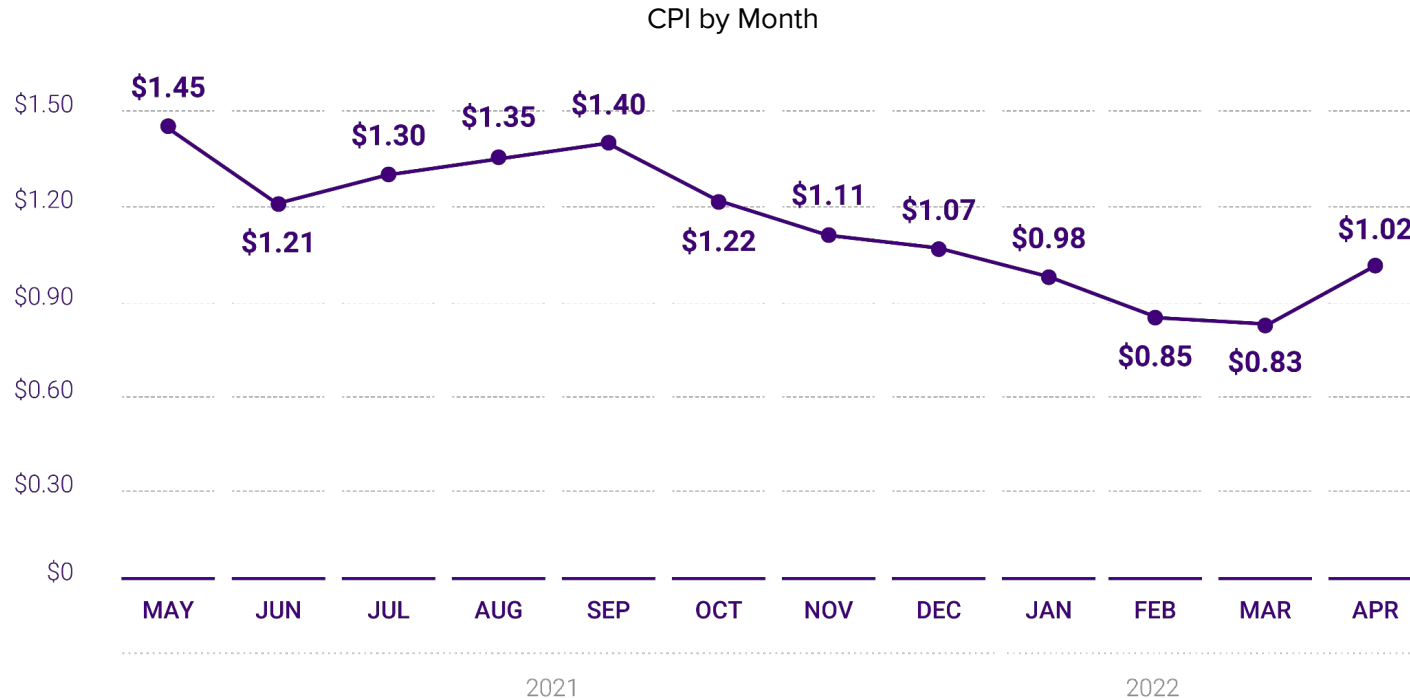
Both D7 and D30 ROAS rates stayed relatively steady, never rising or falling more than 3 percentage points.

ROAS by Month

■ D7 ROAS　　■ D30 ROAS

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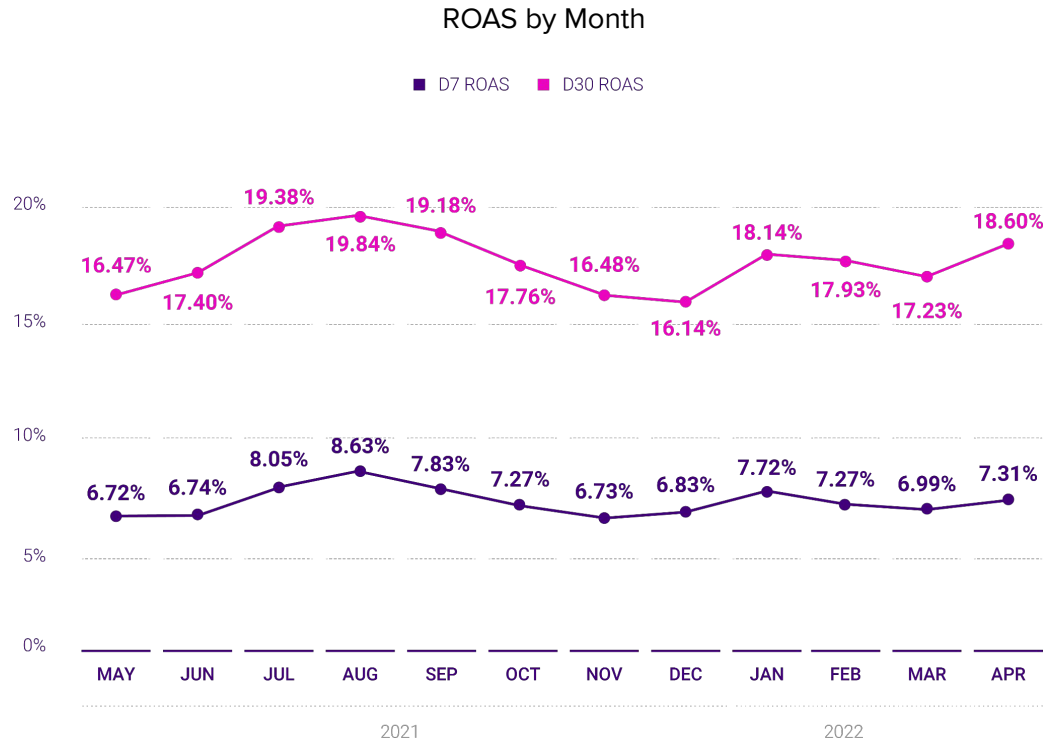
It can be easy to get obsessed with vanity metrics like D1 retention and lose sight of the end goal. Even LTV and CPI can be superficial metrics. At the end of the day, it doesn't matter if I spend $1 or $10 per user if I'm reaching 100% profitability. People get really focused on these absolutes when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

Danika Wilkinson
Head of Marketing, New Games

Socialpoint

Read the full interview

Market Trends by GameRefinery

What do users want out of their gaming experiences?

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

Top games and challengers (US, iOS)

Based on GameRefinery's Casual Gaming Trends Report   L I F T O F F

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

Based on GameRefinery's Casual Gaming Trends Report

L I F T O F F

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

Based on GameRefinery's Casual Gaming Trends Report

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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

Based on GameRefinery's Casual Gaming Trends Report

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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.

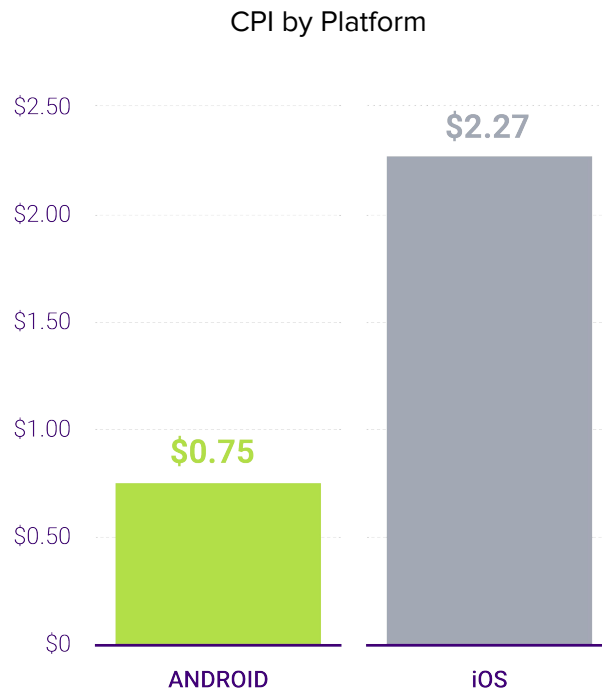Melanie Zimmerman
Head of Marketing at Wooga

Wooga

Read the full interview

Android vs iOS

Which platform wins?

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

CPI by Platform

$2.50

$2.27

$2.00

$1.50

$1.00

$0.75

$0.50

$0

ANDROID   iOS

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

ROAS by Platform

DAY 7

DAY 30

6.86%

7.58%

17.87%

17.69%

■ ANDROID   ■ iOS

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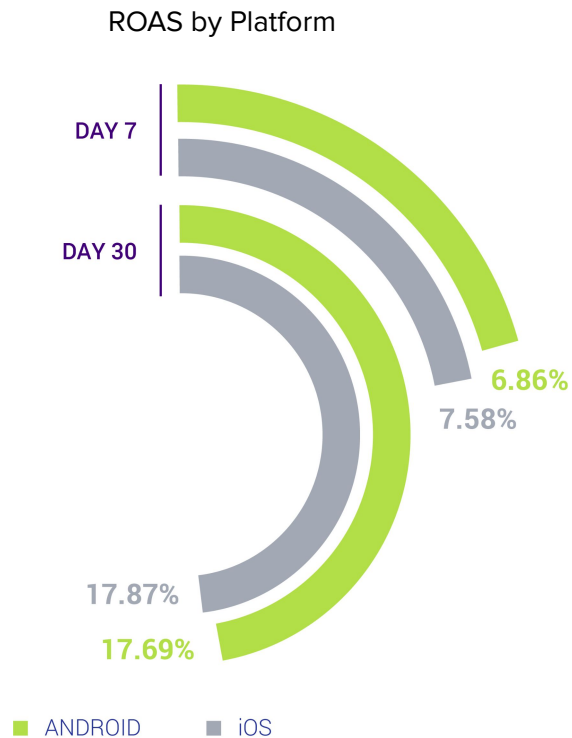
A decade ago, it was hard to get lots of accurate data and then make sense of it. As privacy becomes essential, we once again have fewer data to work with. It's making creative and research much more significant to marketers because you have to make up for missing numbers with creativity.

Vinícius Gerez
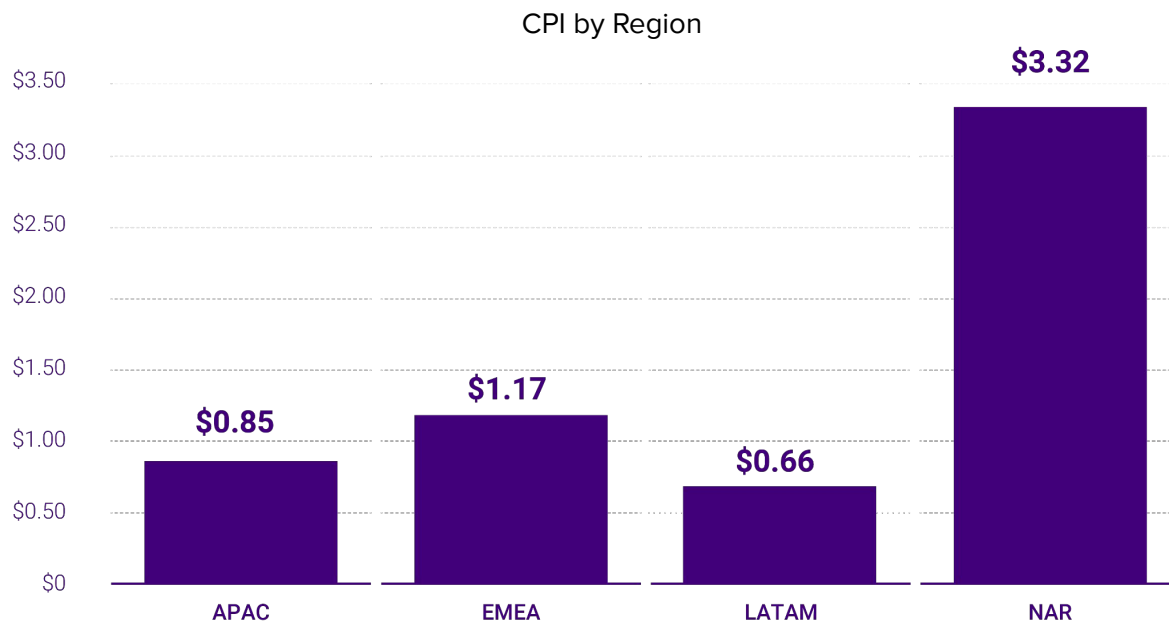Principal User Acquisition Manager at Wooga
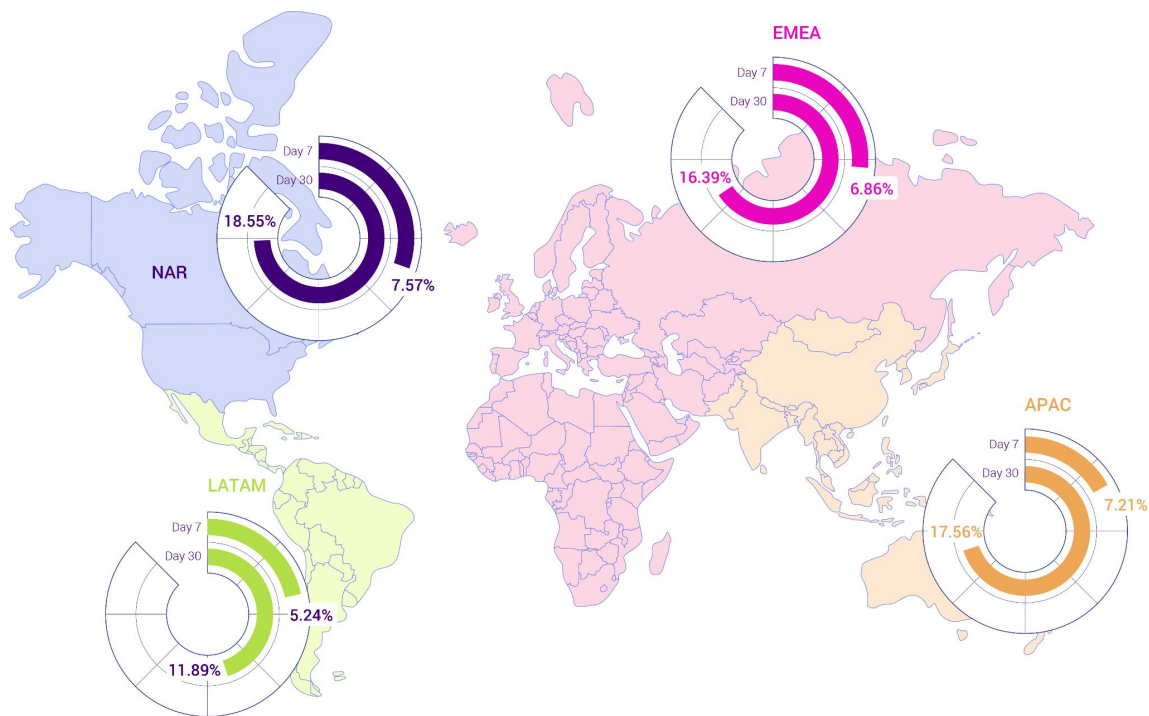
Wooga

Read the full interview
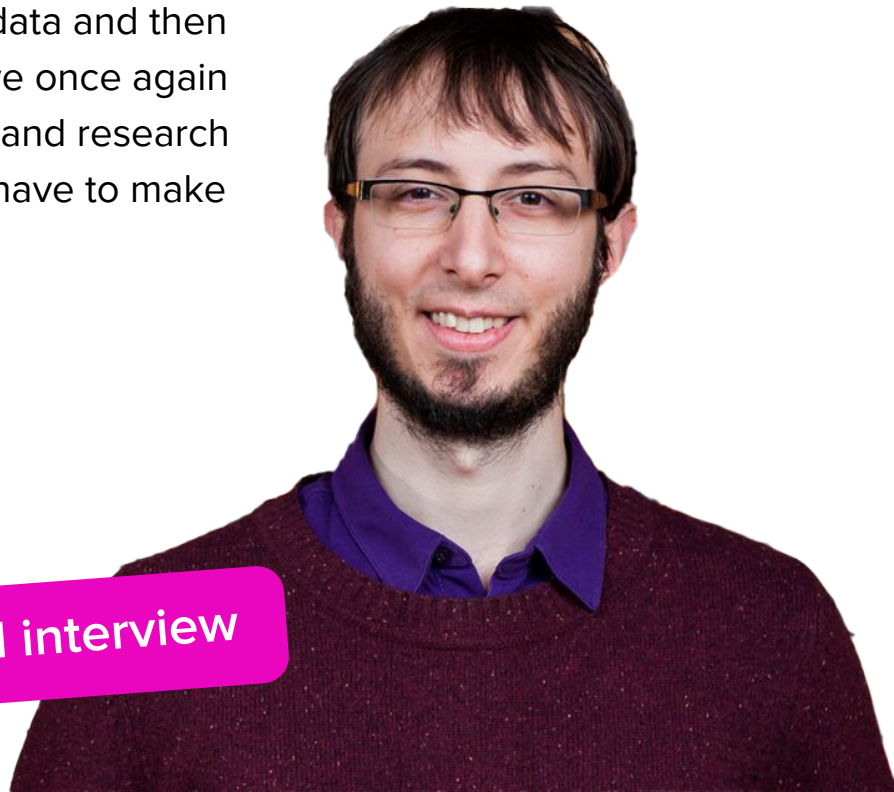
Regional Trends

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

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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.

CPI by Region

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

ROAS by Region

EMEA

Day 7
Day 30

16.39%   6.86%

NAR

Day 7
Day 30

18.55%   7.57%

APAC

Day 7
Day 30

17.56%   7.21%

LATAM

Day 7
Day 30

5.24%

11.89%

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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

JAM CITY

Read the full interview

Notes on the Report

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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

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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

GameRefinery

A Liftoff Company

WHO IS GAMEREFINERY?

GameRefinery, a Liftoff 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