liftoff   **GameRefinery**
A Liftoff Company

Casual Gaming Apps Report

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Contents
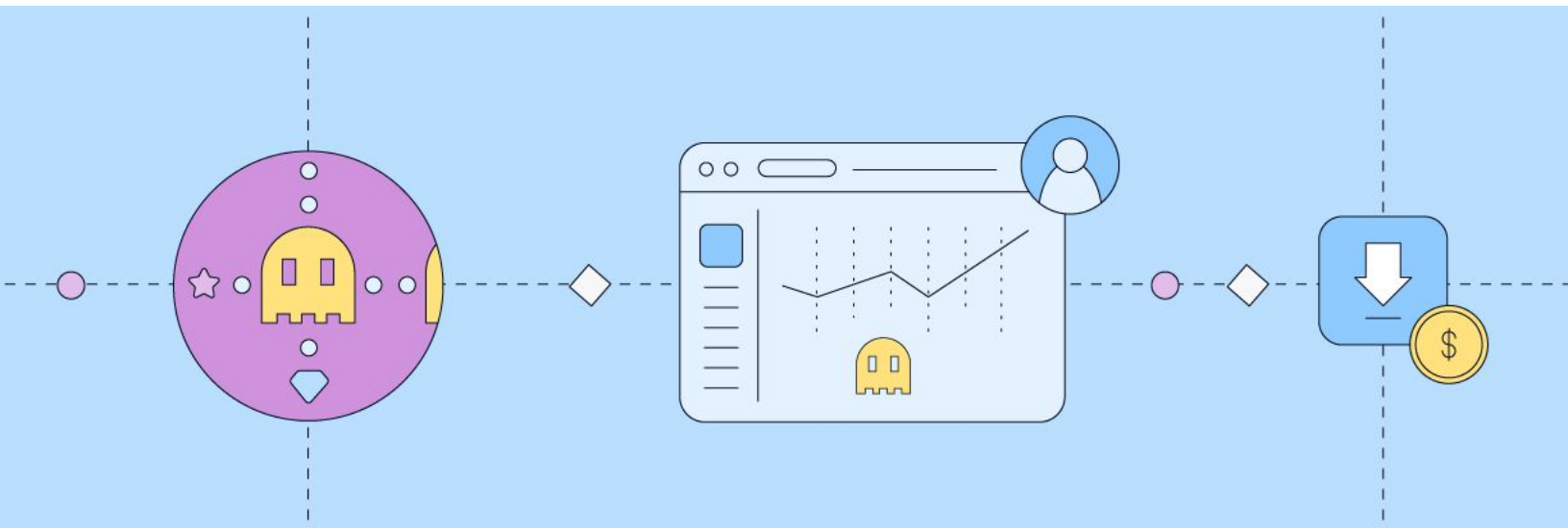
Introduction

The post-pandemic years have been tough for mobile gaming companies, but there is cause for optimism. According to data.ai, while downloads and in-app purchases are still lagging coming out 2023, consumer spend overall is rebounding, and total hours spent in apps continue to grow. While game developers are unlikely to see the unprecedented growth and engagement rates of 2021, the mobile gaming market continues to be dynamic, and there are opportunities for newcomers and incumbents alike.

From innovations to genre norms to new monetization strategies, mobile games are already evolving to meet the challenges of the market. As hyper casual games fade in popularity, casual games survive and thrive by continuing to evolve and innovate. 3D match games have carved out their lucrative niche, and hybrid-casual success stories continue to dominate industry attention.

Live events are now a staple for top-performing games. From partner events to social win streaks, events are key to keeping valuable players engaged longer. Monetization strategies are also changing. Different progressive offer bundles, for example, encourage ongoing purchases while offering value to players. In a demanding market, prioritizing ROI every step along the user journey is essential—it's also the focus of this report.

From scaling your audience with the right ROI metrics and insights to driving engagement with the right features to new in-app monetization models, Liftoff's report pinpoints revenue drivers for casual games. In addition to install costs and ROAS benchmarks from Accelerate, Liftoff's programmatic DSP, we share exclusive insights from GameRefinery analysts to help game developers and marketers capture value where it counts. For app developers and marketers looking to thrive in 2024, the right partners combined with a data-driven approach will be essential.

Top Tip

In a market where margins are close, you need partners who can deliver high-value users who consistently engage.

- ◆ Liftoff Accelerate improves ROI for gaming advertisers by optimizing paths to quality traffic via the Vungle Exchange.

- ◆ 95% of top gaming apps have the Vungle SDK integrated.

- ◆ Partner with Liftoff to connect your ads with the right audience.

Highlights & Methodology

ROAS & CPI

D7 ROAS for iOS and Android both rose between June and August before dipping in September.

Installs by Category

74% of midcore installs came from ads shown in casual games.

Installs by Genre

Ads shown in hyper casual and puzzle games drive over two-thirds of casual game installs. Simulation and lifestyle are also significant drivers.

Trends in Live Events

Among the US top 25 casual games, approximately 70% have some form of progressive offer. Approximately 50% have introduced it as a new feature during the past 12 months.

Innovations in In-App Purchases

An increasing number of casual developers are exploring external web stores to circumvent the app stores' high IAP transaction fees.

All data for the report comes from **GameRefinery** and **Accelerate**, Liftoff's programmatic advertising solution.

This report is based on data from

April 1, 2023 - April 1, 2024

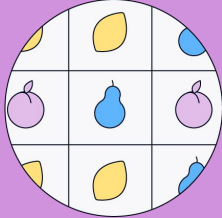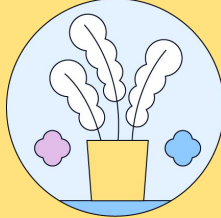| 355B	36B	90M
Impressions	Clicks	Installs

How We Define Casual Game Genres

Our cost and ROAS benchmarks cover three of the biggest casual gaming genres. Here's how Liftoff defines them:

Puzzle

Puzzle is a wide-ranging genre. Examples include match 3, solitaire, hidden object, word games, coloring games, and trivia titles.

Lifestyle

Lifestyle games include interactive stories, home customization, and dress-up titles, as well as rhythm and music games.

Simulation

From adventures abroad to creating new cities, simulation includes anything that puts the player in charge of building an empire.

"Although the mobile gaming market took some hits post-pandemic, revenue from evergreen gaming genres are trending up, and there's room for growth. In a competitive market, choosing the right partner makes a difference. Find one with a proven data-driven approach, access to quality users, and reliable, expert insights into the mobile gaming landscape."

Joey Fulcher
VP of Global Accelerate Sales, Liftoff

liftoff

Cost & Revenue Benchmarks
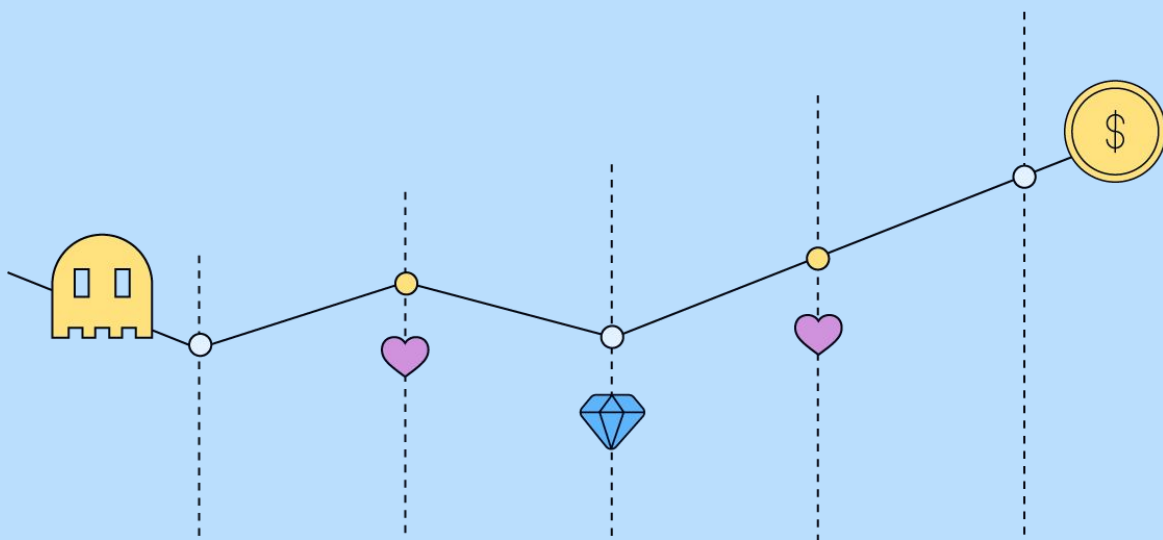
→ Casual Gaming CPI, Overall, & by Platform

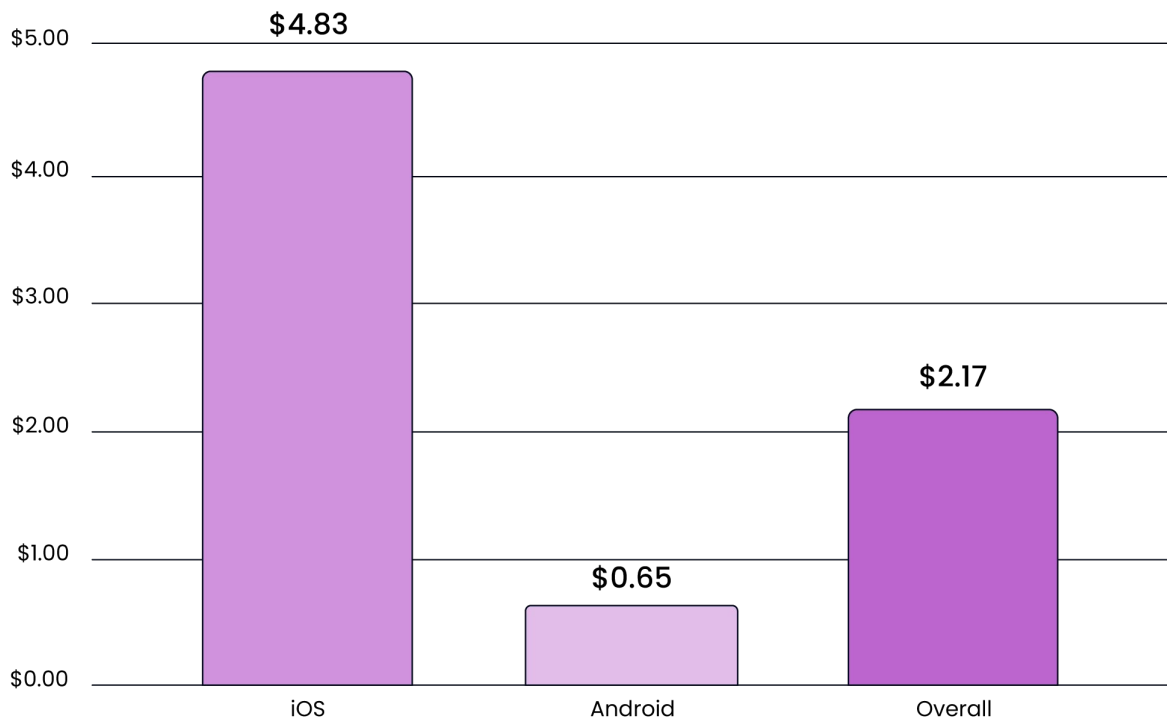→ D7 ROAS, Overall & by Platform

→ CPI by Month

→ D7 ROAS by Month

→ CPI & D7 ROAS by Region

→ CPI by Genre

Casual Gaming CPI, Overall, & by Platform

Overall acquisition costs have increased for casual gaming advertisers, mainly driven by increased costs on iOS. The average cost per install (CPI) for casual games between March 2023 to March 2024 on iOS was $4.83 per install.

◆ Since 2021, Android has been the less costly platform for casual gaming apps. In the past 12 months, the average CPI was $0.65.

◆ Acquiring users on iOS costs nearly 8x as much as on Android.

D7 ROAS, Overall, & by Platform
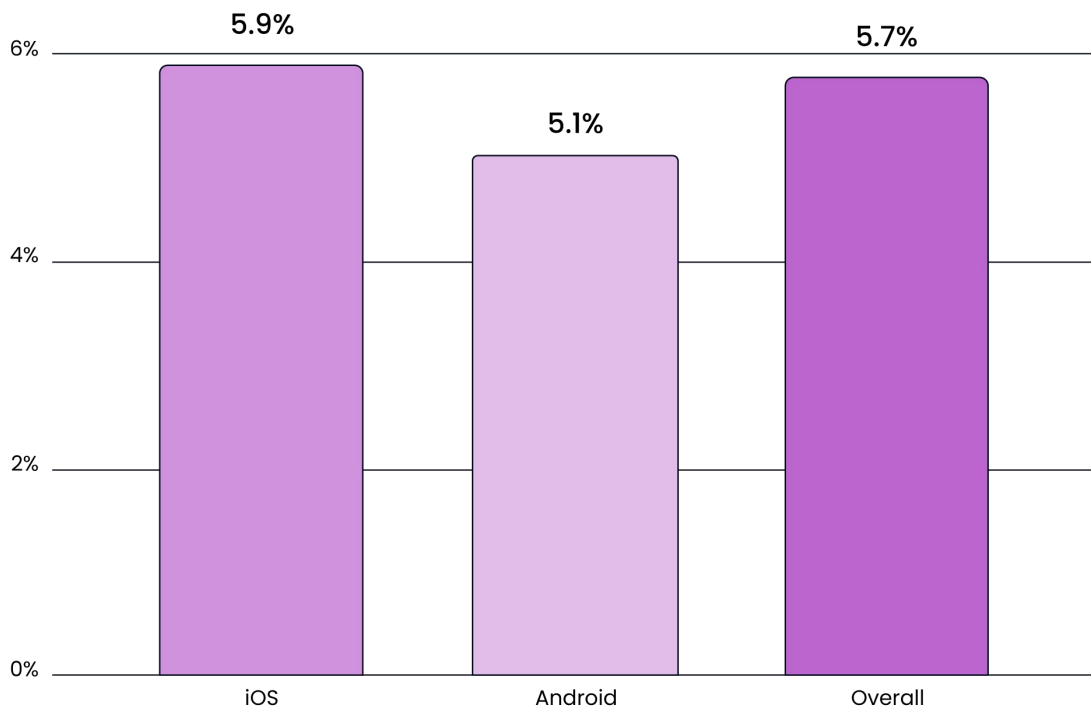
As the casual market grows increasingly competitive, balancing revenue and scale becomes critical for mobile games. Regarding ROI, the market is highly tiered and differs depending on the app.

◆ Overall, casual games saw an average Day 7 ROAS of 5.7%, a slight dip from the average in 2023.

◆ While Android users are more cost-effective to acquire, iOS games see a slightly higher average D7 ROAS at 5.9%.

◆ Revenues for top titles are still growing, but there is also greater stratification in the market. For casual games, there are opportunities to unlock with the right partner and strategy.

CPI by Month
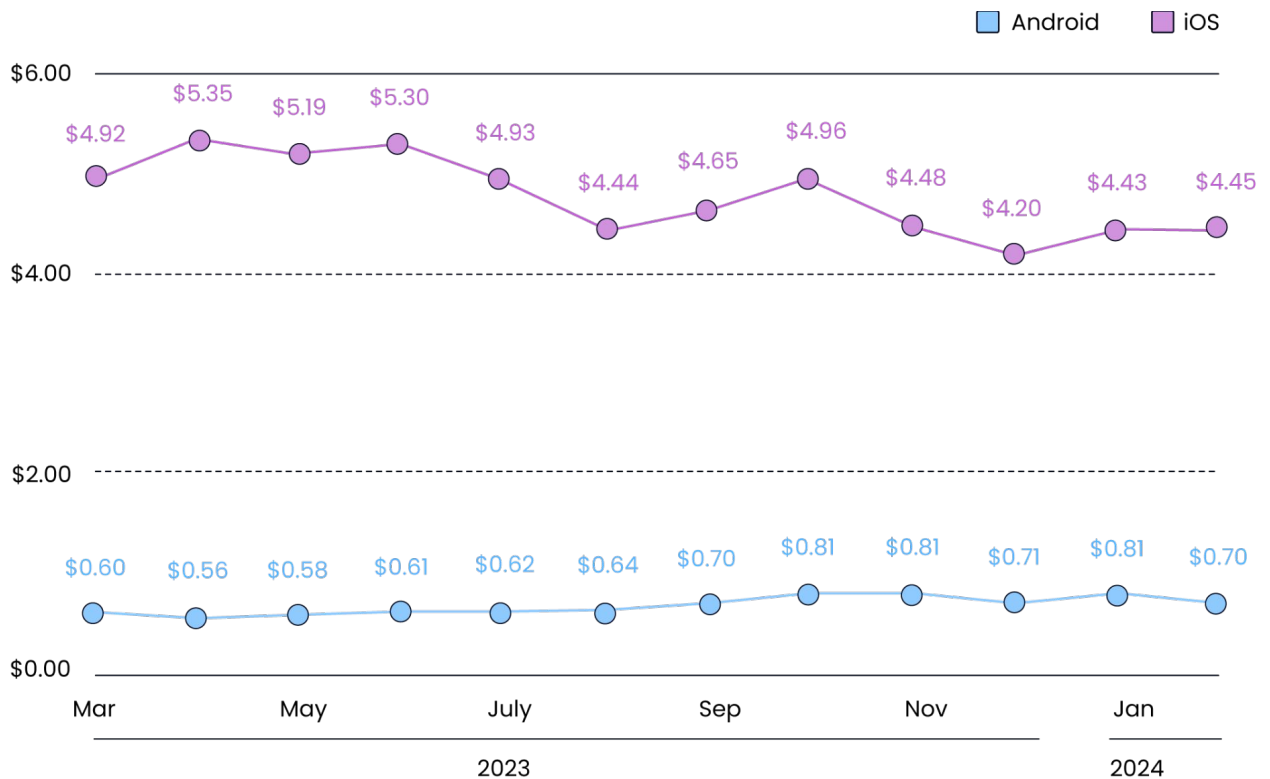
Especially on iOS, CPI vary throughout the year. While costs were higher between March and May, and they dipped between June and August. Android costs are more steady throughout the year. From September to December, Android saw slightly higher costs, possibly as a result of more competition for seasonal engagement.

◆ CPIs for iOS hit annual highs in April and June before falling for the second half of the year.

◆ Android CPIs hovered around $0.60 for the first half of 2023. They climbed slightly from September to December.

◆ Different seasonal patterns speak to the need for unique strategies tailored to campaigns on different platforms.

D7 ROAS by Month

Legend: ☐ Android ☐ iOS

	Mar	May	July	Sep	Nov	Jan	
iOS	6.0%	5.6%	6.2%	5.5%	6.1%	5.6%	
Android	5.5%	5.2%	5.8%	4.2%	4.7%	4.8%	

2023   2024
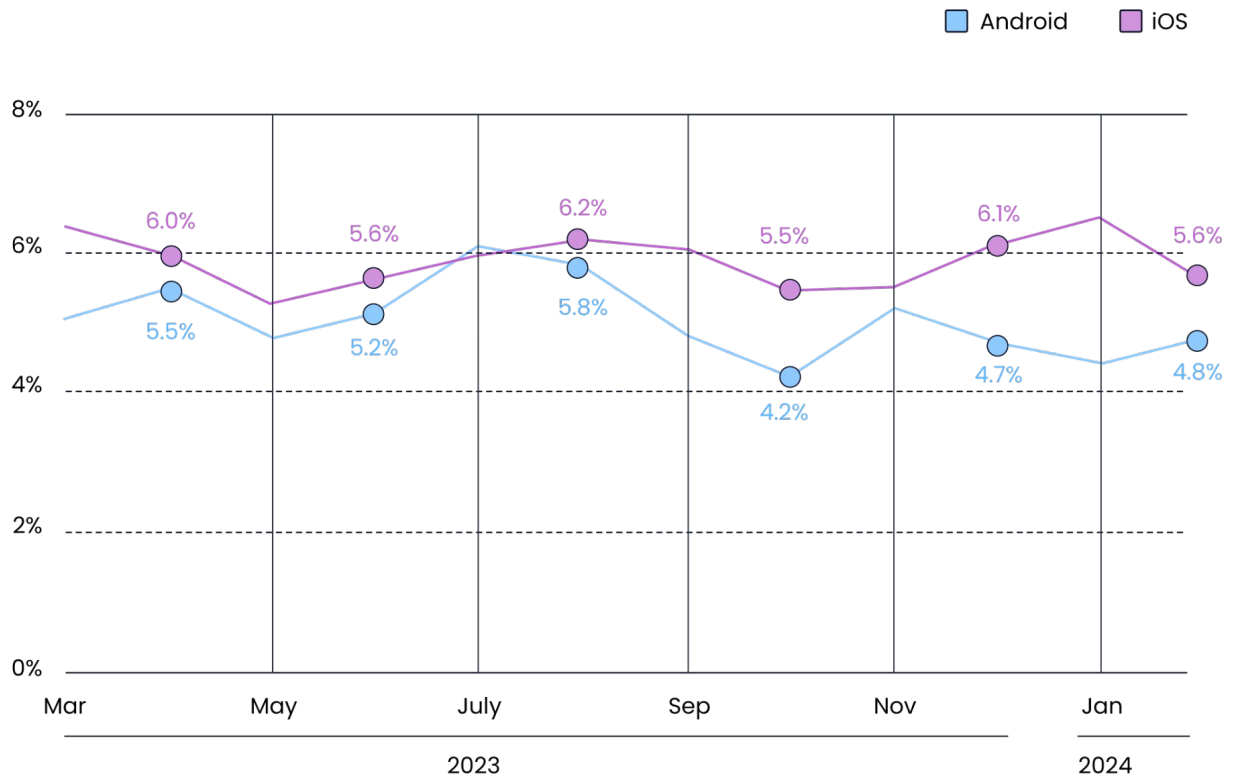
ROAS averaged slightly lower YoY for both platforms. iOS returns hovered around 5.5% to 6% for most of the year, while Android saw somewhat more variation.

◆ Average D7 ROAS on iOS saw annual highs between July and August and December and January.

◆ The average ROAS on Android peaked in the July of 2023 before dipping notably between August and October.

◆ Seasonal variations could be due to promotions and events, indicating the importance of an active events calendar and a dynamic campaign strategy.

CPI by Region
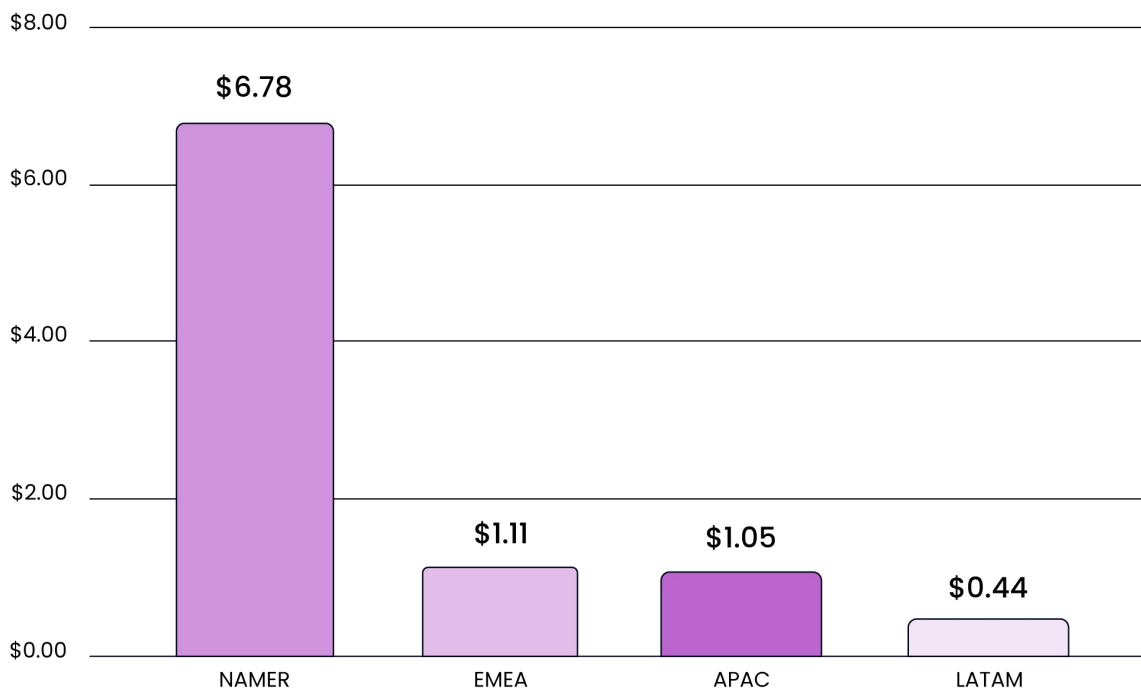
Localizing campaigns are key—as different regions see different habits, preferences, and privacy regulations. Install cost trends by region have settled into a pattern over recent years:
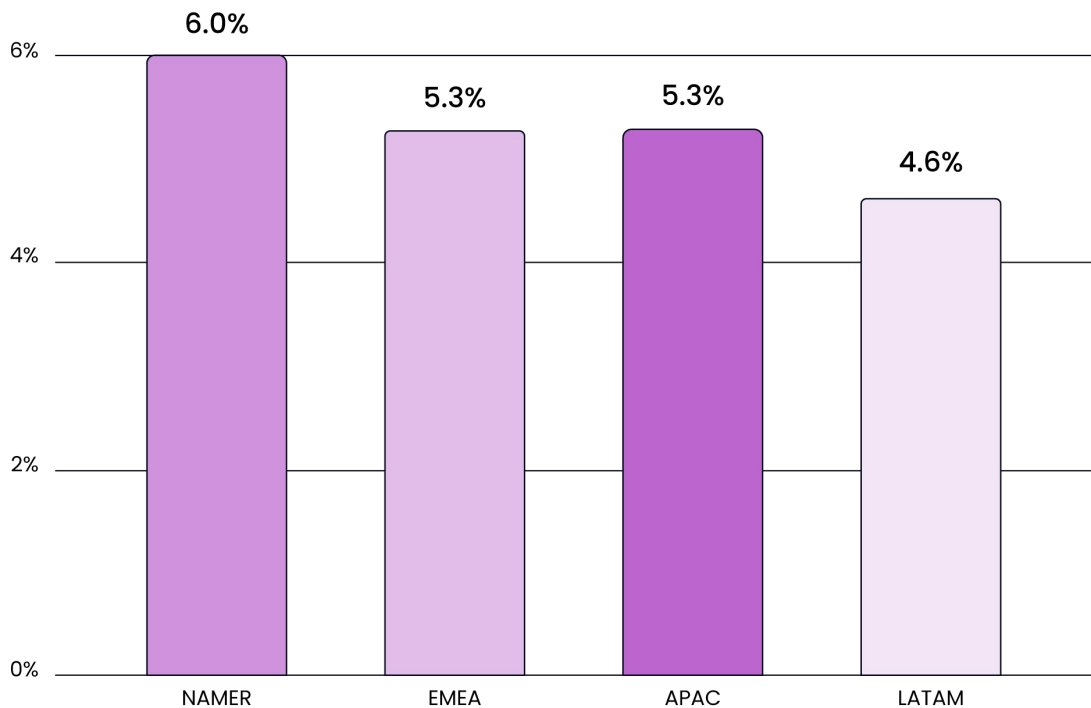
◆ NAMER consistently sees the highest average CPI, about 6x as much as average CPI for EMEA and APAC.

◆ LATAM sees the lowest average CPI at $0.44 per install.

◆ APAC and EMEA have similar CPIs at nearly $1.

D7 ROAS
by Region

As the casual gaming market grows more competitive and saturated for certain segments, success can depend on finding value in the right target regions.

◆ While NAMER consistently posts the highest CPI, this region also posts the highest D7 ROAS by a small margin (6%).

◆ LATAM has the lowest CPI, but it also has the lowest D7 ROAS at 4.6%.

◆ EMEA and APAC have about the same average D7 ROAS at 5.3%, respectively.

CPI by Genre

Different casual-gaming genres see different pathways to success. As hyper casual games disappear or evolve into hybrid-casual counterparts, puzzle, lifestyle, and simulation games attract perennial interest.

◆ Install costs have risen across the board. Simulation games see lower user acquisition costs at $1.77 per install.

◆ Puzzle games represent the largest segment, and the average cost is around $2.23.

◆ Lifestyle gamers cost nearly 2x as much ($2.95) as simulation players to acquire.

Where Do Your Installs Come From?

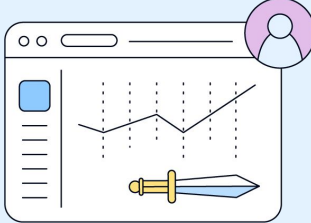→ GameRefinery's Taxonomy of Genres and Subgenres

→ Install Drivers by Category

→ Casual Game Install Drivers by Genre & Subgenre
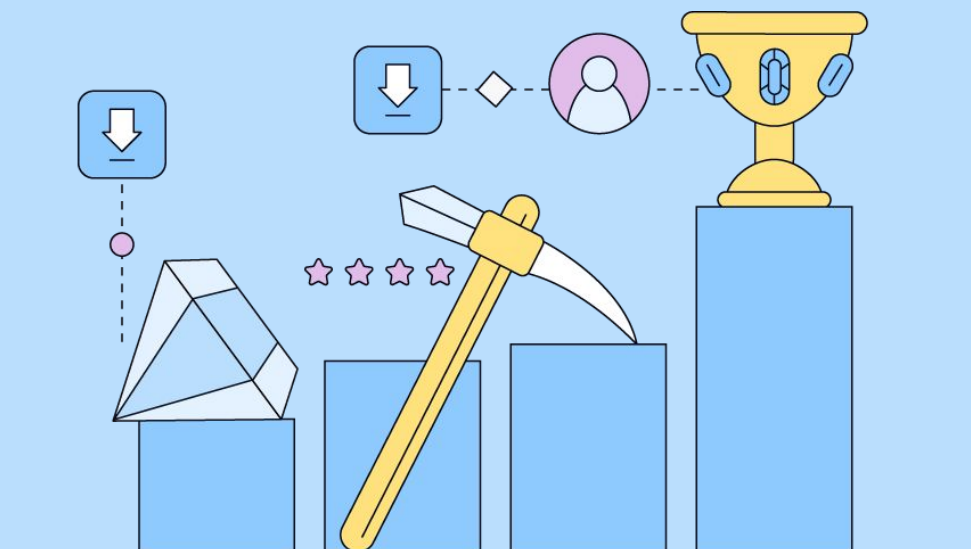
As the gaming market becomes more competitive, finding high-value users is more important than ever. This means placing ads with the right publishers to drive quality traffic.

Drawing on GameRefinery taxonomy of the gaming market (below), we set out to find which games are the top drivers for all gaming installs and the install drivers for each category, genre, and select subgenres.

Mid-core	Casual		Sports & Driving	Casino
RPG Action RPG Tower Defense RPG Turn-based RPG Fighting MMORPG Puzzle RPG Idle RPG Survival Sovereign Games **Strategy** 4X Strategy Asymmetric Survival Build & Battle MOBA Tactic Battler **Shooter** Battle Royale Classic FPS/TPS Snipers Tactical Shooter **Card Games** Card Battler	**Puzzle** Action Puzzle Board Games Bubble Shooter Match 3 Puzzle Merge Games Other Puzzle Word Games Trivia Games Hidden Objects Solitaire/Mahjong **Lifestyle** Customization Interactive Story Music/Band **AR/Location Based** AR/Location Based	**Arcade** Platformer Shoot/Beat' em Up Other Arcade Tower Defense **Hyper Casual** HC - Puzzle HC - Top HC - Steer HC - Swipe/Drag HC - .io HC - Other **Simulation** Adventures Breeding Tycoon/Crafting Sandbox Time Management Idler	**Sports** Arcade Sports Realistic Sports **Driving** Arcade Driving Realistic Driving	**Casino** Bingo Casual Casino Other Casino Poker/Cards Slots

Track gaming installs with our data visualization tool

→

Install Drivers by Category

Chart: Category Drivers - Casual

Category	Percentage
Casino	2%
Casual	91%
Mid-Core	3%
Sports & Driving	5%

Category Drivers - Casual
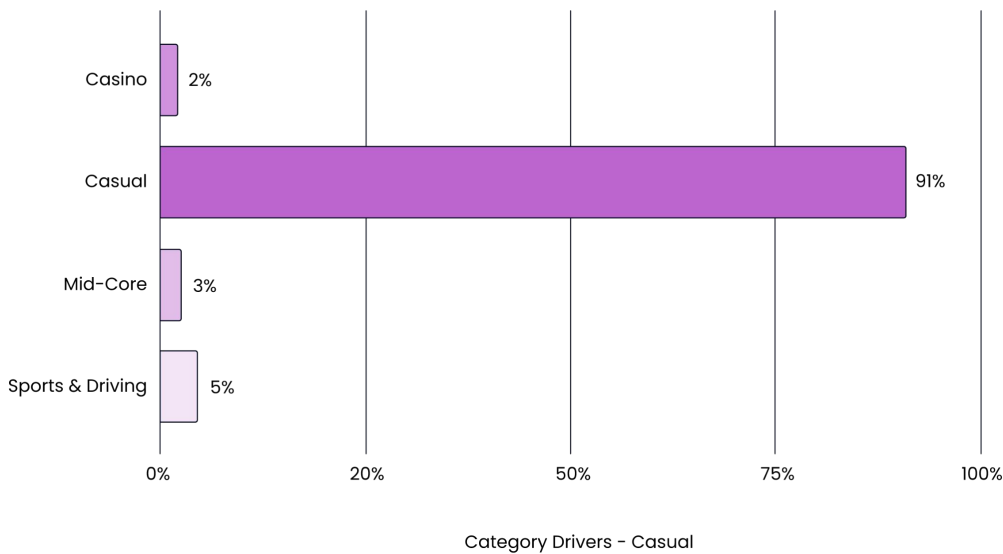
Category Drivers for Casual Games

We noticed clear trends in installs in the past year. Even as more hybrid-genre games find success, most installs for casual games are still driven by other casual games.

Sports & driving games are the second top driver of installs for casual games at a distant 5%. Casino games come in last at 2%.

Category Drivers for Mid-Core Games

For other gaming categories, casual games were consistently a top driver. Based on our sample, 74% of midcore installs came from ads shown in casual games. Other midcore games and sports and driving games were also notable drivers, at 10% and 13%, respectively.

Casino games drove 2% of midcore installs.

Chart: Category Drivers - Mid-Core

Category	Percentage
Casino	2%
Casual	74%
Mid-Core	10%
Sports & Driving	13%

Category Drivers - Mid-Core

Casual Game Install Drivers by Genre

Genre	Percentage
AR/Location Based	0%
Arcade	7%
Casino	3%
Driving	3%
Hyper Casual	29%
Lifestyle	8%
Puzzle	37%
RPG	1%
Shooter	1%
Simulation	8%
Sports	3%
Strategy	1%
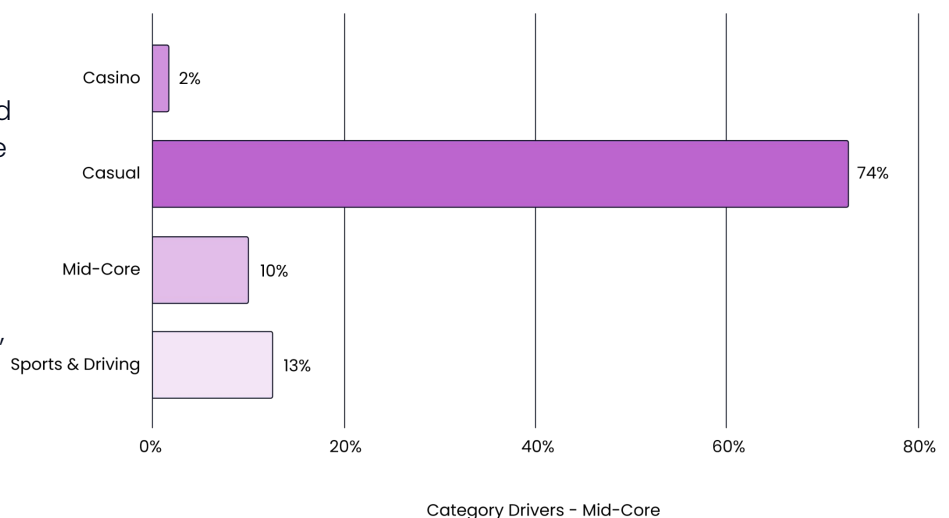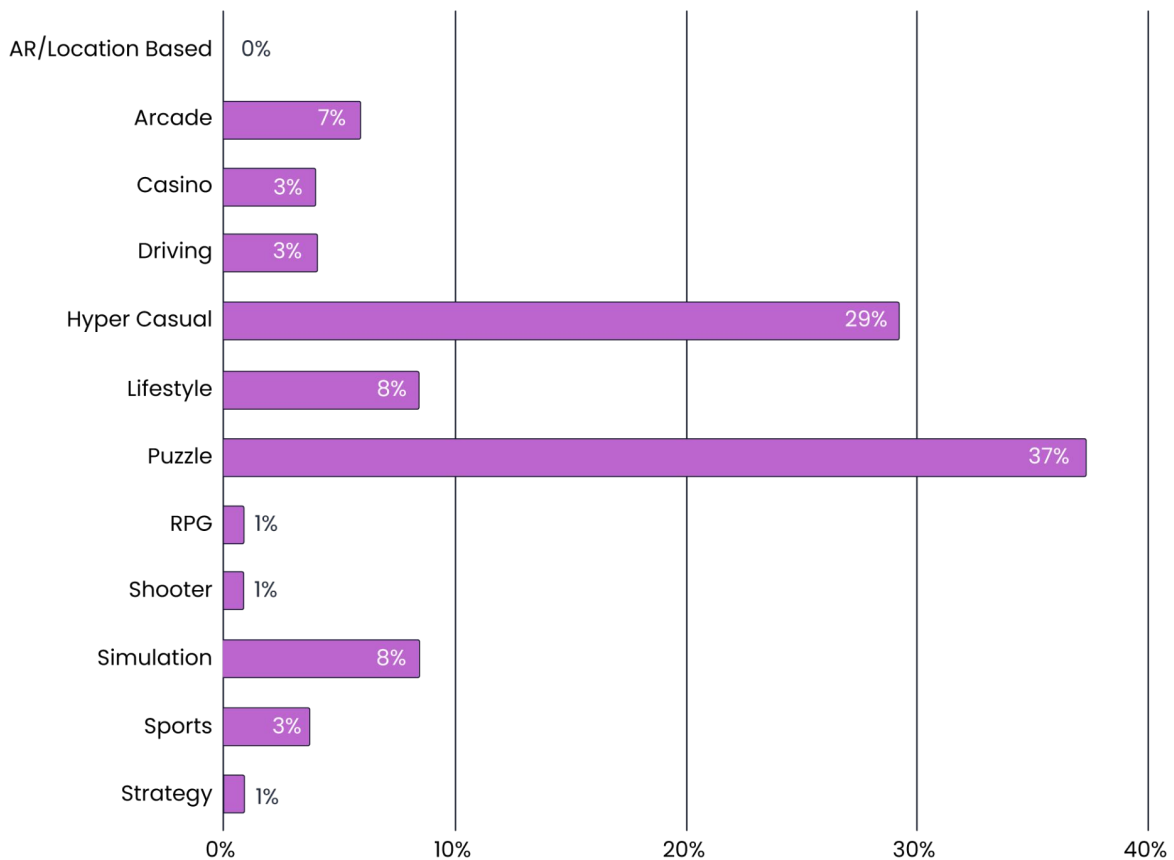
Since they have a broad audience, hyper casual games remain a significant driver of installs across all genres at 29%. However, we do see their contribution decreasing YoY, likely because the genre is waning. Puzzle games, by contrast, drove 37% of casual game installs—a sign of their continued popularity. Simulation and lifestyle games deliver a notable share of installs, each contributing around 8% of total installs.

Casino, sports, and driving games are more niche, each driving about 3% of total installs for casual games.

Although casual games dominate in volume, they also attract a diverse audience. Breaking down total casual gaming installs by subgenre, we see that ads shown in puzzle genres represent a key install driver. Non-puzzle hyper casual genres, however, have fallen off as a top source of installs.

Casual Games Install Drivers by Subgenre

Subgenre	Percentage
Hyper Casual - Puzzle	14%
Match3 Puzzle	11%
Word	8%
Hyper Casual - Tap	7%
Solitaire / Mahjong Solitaire	7%
Hyper Casual - Steer	5%
Other - Puzzle	4%
Customization	4%
Coloring Games	4%
Idler	3%
Tycoon / Crafting	3%
Platformer	3%
Board Games	3%
Hyper Casual - Other	2%
All Others	22%
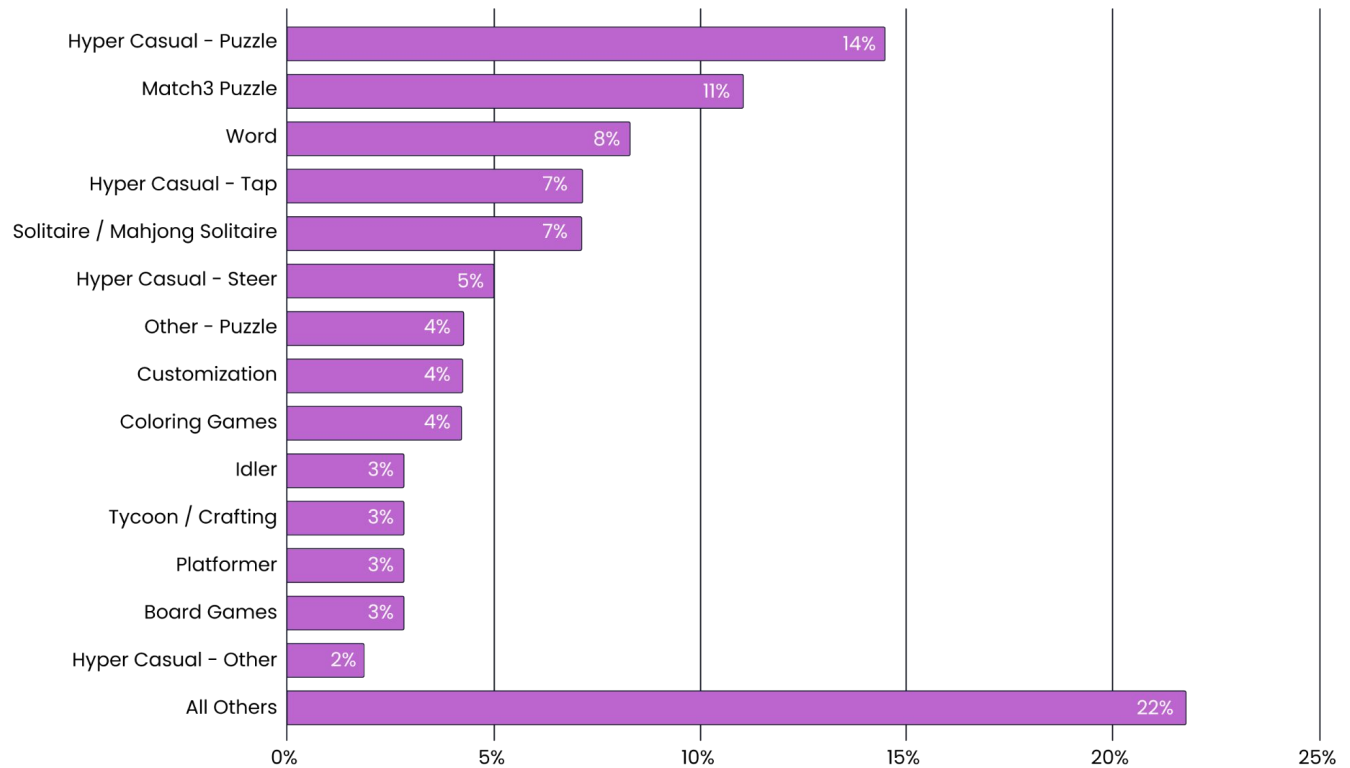
"We're seeing the casualization of ads—even for midcore titles. But the trend only works if you adapt your product too. In an idle battler RPG game, for instance, casual ads will work well if you pace your player journey to introduce the RPG complexity slowly. By the time the user understands how complex the game is, they're already familiar with it. A good example is Archero, which achieved massive scale by showing hyper casual ads and then easing users into a fairly complex casual-core game."

Paula Neves
Lead Product Manager in Games

🐾 zynga

Trends in Gaming Genres & Events

Snapshot: Rising Stars in Casual Gaming
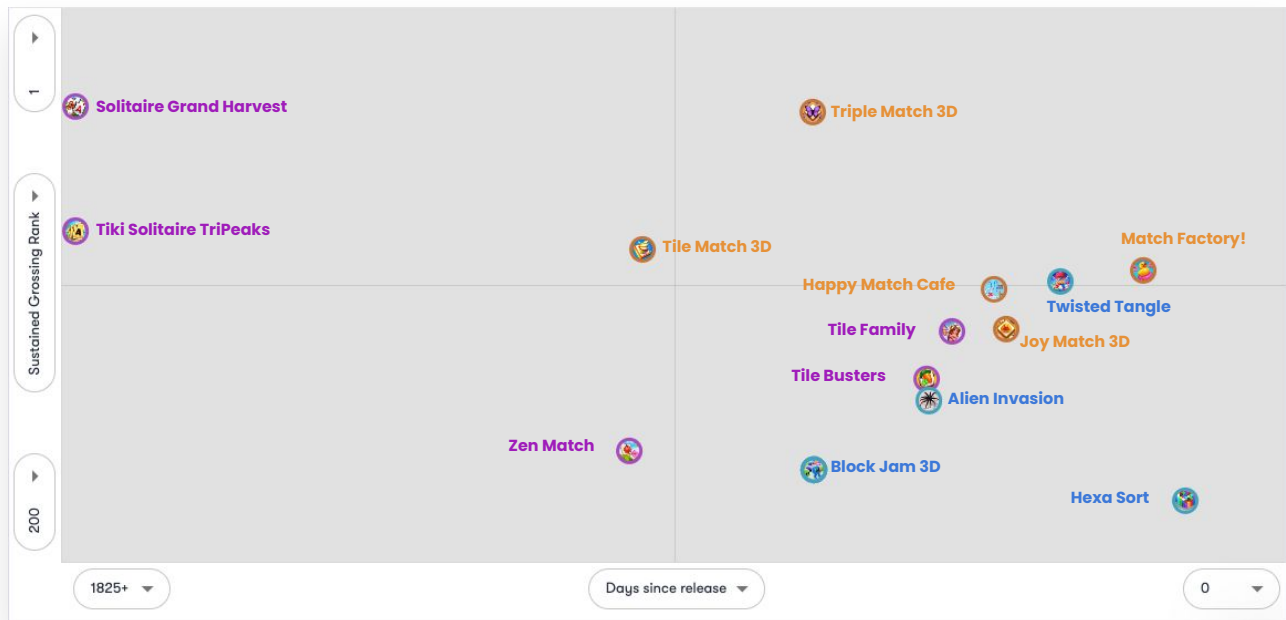
Orange: 3D match   Purple: Mahjong solitaire   Blue: Hybrid casual

3D match, mahjong solitaire, and hybrid casual presence in the top 200 casual games on the market in March 2024. US market data (iOS) from the GameRefinery platform.

The last 12 months saw exciting innovations in the casual gaming genre. 3D match and mahjong solitaire have stood out as dynamic, innovative genres staking their claim on the market. We've also seen more hybrid-casual titles find the right formula for success.

◆ Throughout 2023, **3D match titles** like Match Factory! and Tile Match 3D have scaled performance, establishing their niche in a highly competitive puzzle market space.

◆ **Mahjong solitaire games** are evolving their format, injecting energy into the market with fresh meta and core combinations. They're also leveling up their event strategies.

◆ **Hybrid-casual games** are gaining momentum, with many now entering the top grossing charts. These games focus on simple, polished gameplay, combining ad monetization with IAPs, and unlocking monetization potential through varied gameplay features and meta layers.

3D Match Finds Its Footing

After Triple Match 3D paved the way for this newest hit puzzle format, others have followed suit. Based on GameRefinery data, market share for 3D match games in the US iOS top 500 grossing has grown from $2.95M to an impressive $15.25M between Q4 2022 and Q4 2023.

Happy Match Cafe, which began scaling in August 2023, blends the core 3D matching gameplay with a renovation meta layer, narrative, and minigame modes.

All the top-grossing 3D match games on the US market feature similar core puzzle mechanics—players declutter piles of items, three pieces at a time. Titles like the original Triple Match 3D and Peak's newer competitor, Match Factory, are finding success with the classic puzzle-focused format. Others are now adding renovation meta layers, minigames, and narrative elements to stand out.

3D matching has also started appearing elsewhere in mobile games via minigame modes—in the mahjong solitaire hit Tile Busters, for example.

The Evolving Mahjong Solitaire Genre

Zen Match kicked off the mahjong solitaire puzzle trend in July 2021 with its unique gameplay and "zen" vibe. It has since inspired competitors like Tile Busters and Tile Family. Both games have entered the US top 200 grossing by adding twists and boldly drawing from broader casual trends.
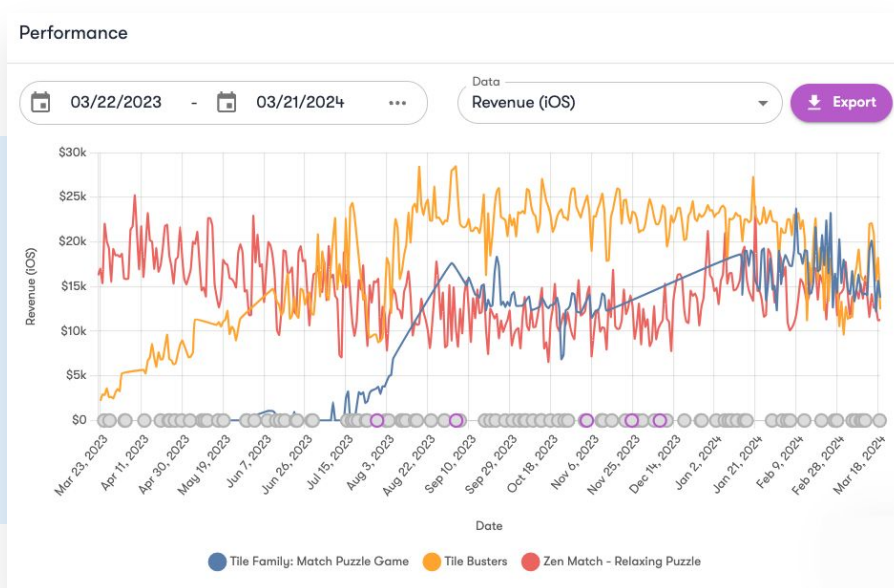
Revenue data (US, iOS) from the GameRefinery platform (left). Tile Family has dialogue attached to the renovation meta progression. (right).

Zen Match was the first and only mahjong solitaire game in the top 200 for some time. It was followed by a swift overtaking in store rankings by Tile Busters with it's dynamic live event framework, and soon, Tile Family entered the race.

Tile Family uses narrative elements to breathe life into the "Coin Master-renovation meta." They also utilize "pull the pin"-type minigame levels between regular puzzle levels for variation and offer a light card collection meta layer.
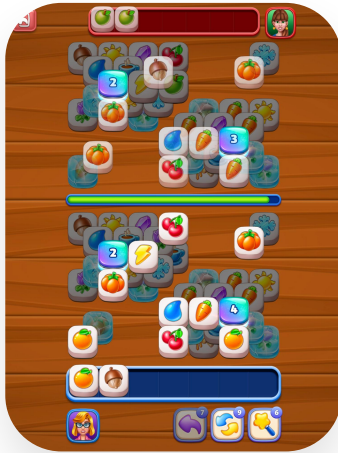
Tile Busters' LiveOps calendar has a fast pace of rotating events, with lots of different competitive events, including a synchronous PvP event.

Tile Busters
Spyke Games
Solitaire / Mahjong Solit...

💬 Analyst Overview

March 2024

|	Fr 1	Sa 2	Su 3	Mo 4	Tu 5	We 6	Th 7	Fr 8	Sa 9	Su 10	Mo 11	Tu 12	We 13	Th 14	Fr 15	Sa 16	Su 17	Mo 18	Tu 19	We 20	Th
Game Version							2.43.0		2.43.1									2.44.0			
Top In-App Purchases Change	$	$	$	$	$	$	$	$	$	$	$	$	$	$	$	$	$	$	$	$	
Revenue Change	-22%	-11%		+20%	+34%	+49%	+47%	+47%	+41%	+33%	+29%										
Downloads Change	-54%	-46%		+21%	+40%	+55%	+125%	+167%	+114%	+34%		-20%									
Analyst Notes																					
Battle Pass		Spring Journey														Spring Journey					
		North America Flight																			
Competitive Event - 1v1		Knight's Challe...		Knight's Challe...				Knight's Challe...						Knight's Challe...		Knight's Challe...					
Competitive Event - Race	...on Race		Treasure Hunt		Balloon Race					Treasure Hunt		Car Race			Treasure Hunt						
	...ar Race																				
Competitive Event - Solo Tournament	The League			Bullseye		The League				Bullseye		The League			Bullseye						
	Weekly Winners		Weekly Winners						Weekly Winners						Weekly Winners						
PvP - Permanent Mode Loop									Instant Duel												
Decoration Event									Decoration Event: St. Patrick's Day												
Task Event - Collecting Thresholds																					
Task Event - Solo Missions									St. Patrick's Day Bingo												
Minigame Event - Thinking Core			Order Rush						Order Rush												
	Puzzle Calendar : March																				
Win Streak	Win Streak - Magic Beanst...		Win Streak - Rapunzel				Win Streak - Magic Beanst...		Win Streak - Rapunzel						Win Streak - Rapunzel						
															Win Streak - St. Patrick's ...						
Monetization - IAP Bundle/Offer	Miss ...	Bundle Offer : ...	Bundle Offer : ...		Bundle Offer : Fl...		Pick One : Magi...	Bundle Offer : C...			Bundle Offer : I ...	Bundle Offer : Real Deal	Bundle Offer : ...								
	...e Off...	Pick One : Choo...		Progressive Off...		Pick One : Choose One	Pick One : St. p...	Pick One : Choo...		Pick One: St. Pa...	Pick One : Choo...										
		Progressive Off...		Progressive Off...		Progressive Off...		Progressive Off...		Progressive Off...	Progressive Off...										
		Progressive Off...				Progressive Off...															

Both games intentionally deviate from Zen Match's relaxing and stylish atmosphere. Tile Busters' synchronous PvP mode and a good selection of competitive events create a more hectic and dynamic feel.

Hybrid-Casual Success Story: Twisted Tangle

Twisted Tangle from Rollic, a prolific hyper casual publisher, is undoubtedly the biggest recent success story in the hybrid-casual field. The game's goal is to untangle ropes in as few moves as possible.

This new type of puzzle game with a tangle-solving core mechanic was first seen in ad creatives, then skyrocketed in revenue around December 2023, and has since stayed in the US top 200 grossing games.
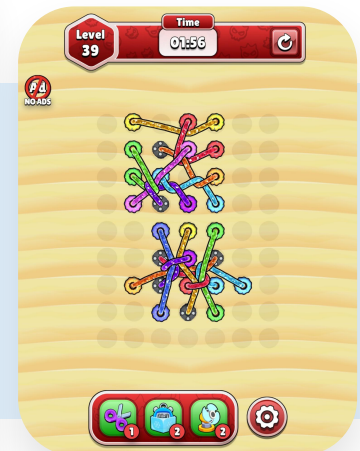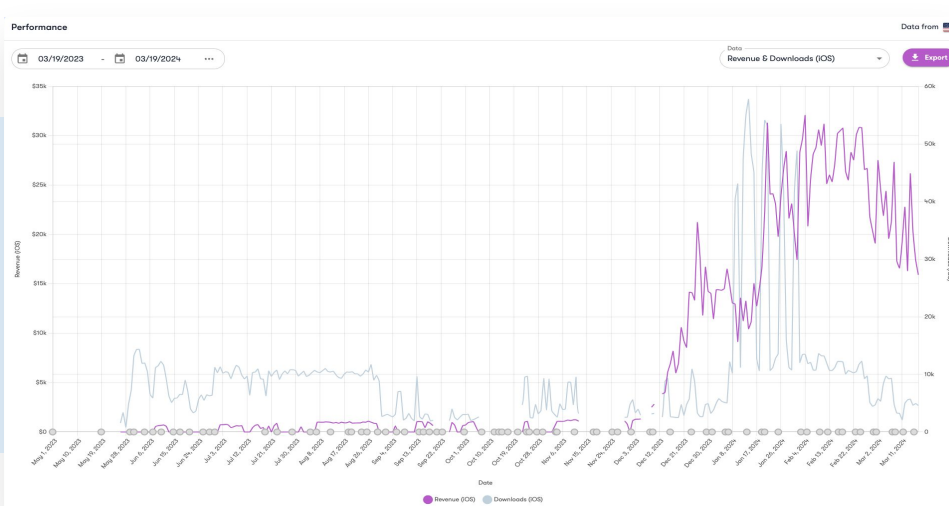
Twisted Tangle made an impressive leap in revenue boosted by UA, but sustained by in-game features. Revenue & downloads data (US, iOS) from the GameRefinery platform.

Core gameplay for Twisted Tangle depicts piles of tangled ropes that players need to untangle within a time limit. They do this by moving the ends of the ropes between open slots. The game scaled performance by gradually **making essential changes to the original format to evolve it from a hyper casual game to a hybrid-casual winner:**

◆ Shifting to a completely linear saga map with levels alternating in difficulty.

◆ Adding IAP boosters and more varied level mechanics.

◆ Adding ad skip tickets and a simple, premium cosmetics collection layer that brings new ad and direct monetization sinks.

Hybrid-Casual Success Story: Alien Invasion

Idle arcade is a hybrid-casual subgenre that has its roots in hyper casual. The subgenre emerged around 2020, but none of the idle arcade titles has secured a place in the top 200 until Alien Invasion.

The core gameplay for Alien Invasion is based on the familiar idle arcade loop of moving a character on an open field, gathering resources, and delivering them back to a silo to advance a fairly simple power progression.
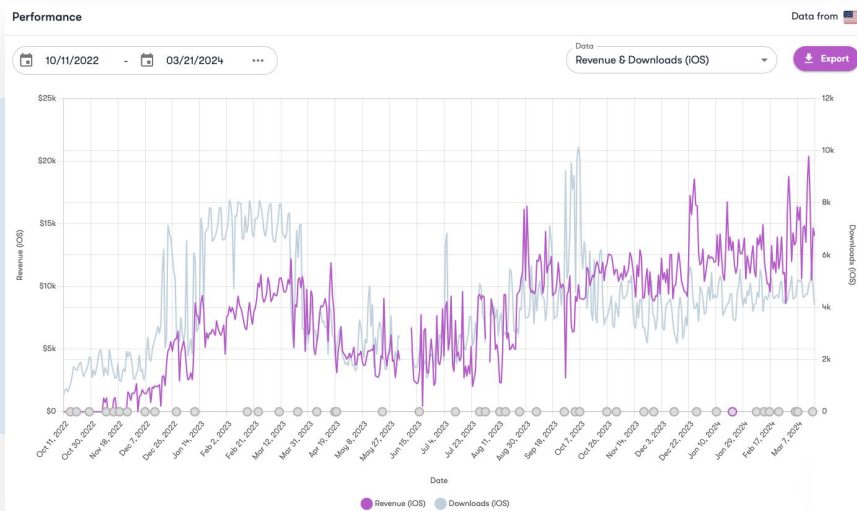
Alien Invasion has made steady revenue gains since its launch in October 2022. In autumn 2023, they broke through to the US top 200. Revenue and downloads data (US, iOS) from the GameRefinery platform.

The game is made addictive by the recurring competitive ranking events where players strive for higher ranks to earn **permanent gameplay upgrades**, not just temporary event boosts.

◆ Real-time rank updates add urgency and amplify the sense of competition.

◆ Ranking high offers substantial one-time **rewards of premium currency**, which are grueling to obtain otherwise, increasing the event's appeal.

◆ A Piggy Bank for additional event points, added in January 2024, enhances monetization and boosts engagement.

Hybrid-Casual Success Story: Block Jam 3D

During 2023, Voodoo's Block Jam 3D found its place in the US top 200 while riding the latest trends in casual.

Block Jam 3D also represents a new puzzle core type that is essentially an evolution of mahjong solitaire, with its gameplay of sorting tray and puzzle pieces stacked in rows instead of piles.
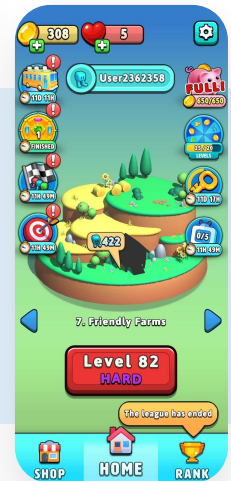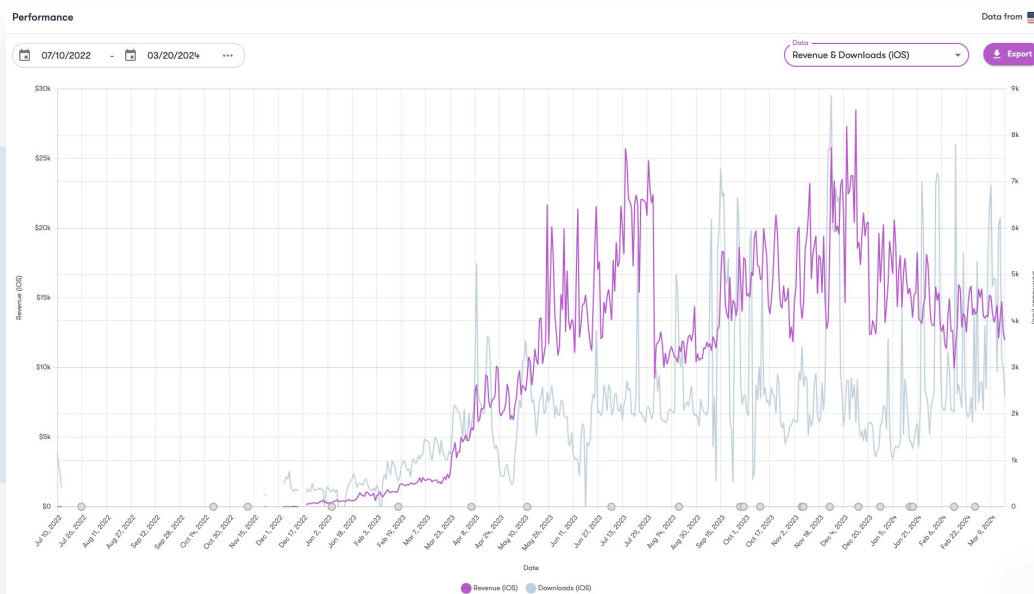
Block Jam 3D's performance development during 2023 and beyond, boosted by their LiveOps experimentation. Revenue & downloads data (US, iOS) from the GameRefinery platform.

The game makes the leap from hyper casual to casual with:

◆ Surprisingly **robust LiveOps** (win streak events, race events, duel event, Battle Pass, player league, a **separate daily level** mimicking Rollic's game Bus Jam, and even the trendy digging event).

◆ The tried-and-true "Coin Master-meta".

◆ Hybrid monetization, including a Battle Pass with cosmetic rewards and experimentation with trends such as the progressive offer.

lotum

Case Study: Transforming Product Development With GameRefinery

Lotum develops and operates games that engage millions of players worldwide daily. With GameRefinery, the company:

◆ Gained insights about feature popularity to improve roadmap prioritization

◆ Generated ideas for game improvements by digging into features at the game level

◆ Reduced production costs with access to a vast collection of feature implementations and FTUE video

→ Read the full case study here

"I recommend using GameRefinery for every data-driven studio that wants to rely on accurate, up-to-date information to make informed game design decisions. With GameRefinery, we have access to a wealth of data at our fingertips. The data allows us to identify trends and patterns that we might have missed before. The dashboards and visualizations are intuitive and easy to use, and the GameRefinery team is incredibly supportive."

Lars Schmeller
Game Lead, 4 Bilder 1 Wort, Lotum

Top Event Trends in Casual Gaming

→ The Latest Trends in Casual Gaming Events

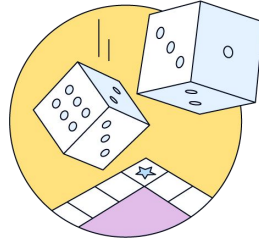◇ Trending: Digging Events

◇ Trending: Social Win Streaks

◇ Trending: Partner Events
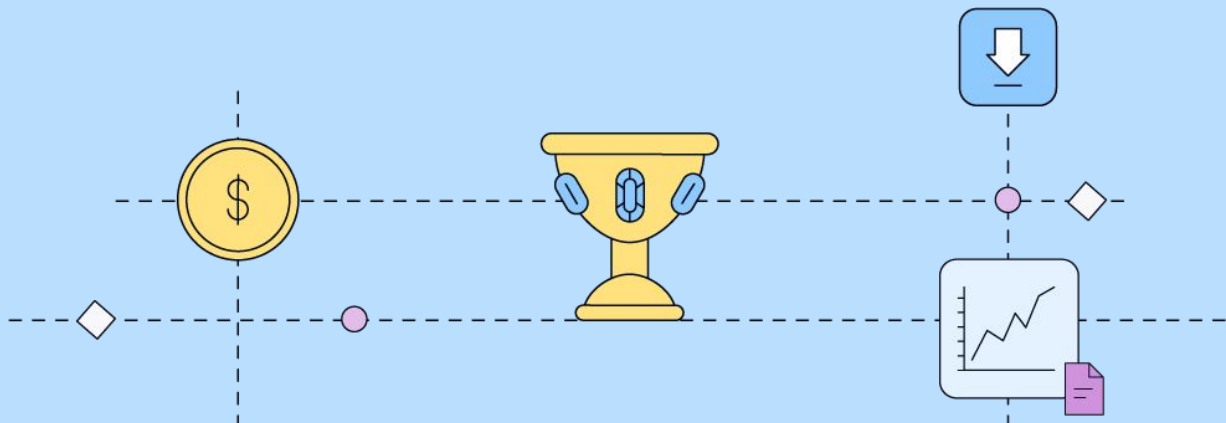
# The Latest Trends in Casual Gaming Events
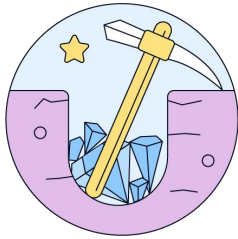
Incorporating minigames to diversify core gameplay has become a staple in casual LiveOps strategy, with **digging events emerging as the latest innovation** in the casual gaming market.

When looking at casual and puzzle games, there's a distinct pattern—a single market leader pioneers new event types, and others quickly follow suit. Royal Match has long held the position of market leader. Over the past year, however, **MONOPOLY GO! has stepped into the spotlight as the top innovator with its new partner event type**, prompting even Royal Match to adopt it.

The introduction of **social win streak events**, this time pioneered by Royal Match through their Lava Quest, showcases another successful way of leveraging social motivations in events.
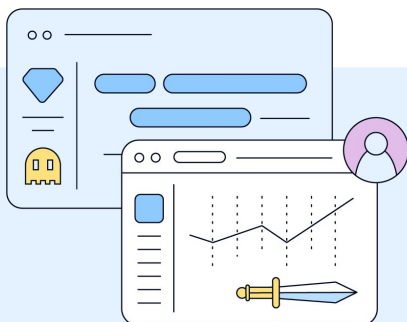
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Trending: Digging Events

Digging minigames, previously seen in midcore games such as Legend of Slime, made their casual debut in June 2023 when Royal Match introduced their first digging event. Royal Match's original digging event is straightforward, but it has inspired more complex versions in other games.

In these events, players use tokens, such as pickaxes, to dig through a grid, revealing hidden items and possible minor rewards. As players uncover the key items, they receive the main reward for that grid and progress to bigger and more challenging grids. The process encourages them to use the tokens strategically. Tokens are typically obtained by completing levels or through IAPs.
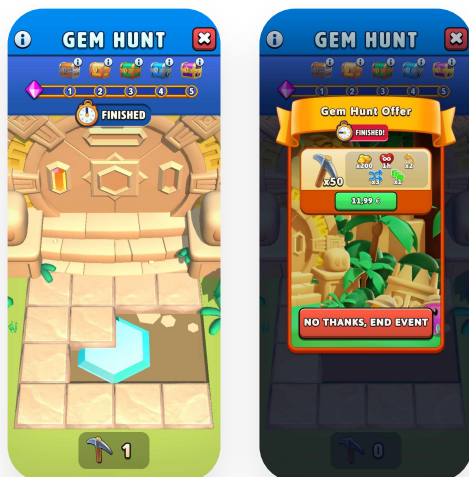
Block Jam 3D's digging event is a near-identical rendition of Royal Match's original design.

However, Block Jam 3D allows you to continue the event by purchasing a bundle offer of pickaxes, boosters, lives, and soft currency.

Survivor.io, a midcore-leaning casual title, often adds various elements to their events. In addition to the hidden key object that resets the grid, their digging event offers separate tasks for earning event tokens and event currency for an exchange shop hidden inside the grid.
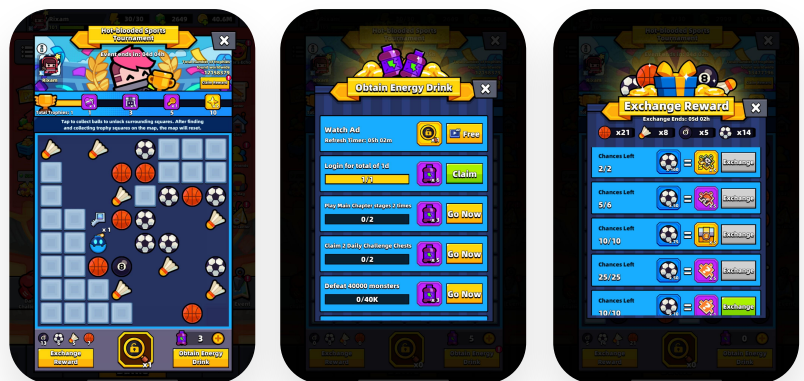
Trending: Social Win Streaks

Social win streak events first appeared on the market in March 2023, when Royal Match introduced Lava Quest, the first event to combine win-streak mechanics with a light last-man-standing competition.

In social win streak events, players are matched into groups of 100 players to compete for an attractive main prize. The participants are challenged to complete successive levels without breaking a winning streak. As the levels are cleared, players who fail get visually eliminated by, e.g., sinking into lava or water. The main prize is then split among surviving players.

The original Lava Quest from Royal Match, and social win streak events from Toon Blast and Harry Potter. Puzzles and Spells

This event type is trending within level-based puzzle games on the US market. Almost a dozen top-grossing puzzle titles have adopted this format since its first appearance.


"As the casual puzzle market matures, newcomers have more and more existing winning frameworks to use as a springboard. Hybrid casual games like Block Jam 3D and the new Mahjong Solitaire games found success by building on a simple but satisfying puzzle core, a visual meta progression, and hybrid monetization. They also swiftly adopt new event types from across the puzzle market, making it possible for some of them to bypass gaming giants and dominate the charts."

Sonja Skoglund
Game Analyst, GameRefinery, a Liftoff Company

Trending: Partner Events

Partner events were pioneered by MONOPOLY GO! with their Baking Partners event in July 2023. The event format proved uccessful and has since been adapted for other high-performing casual titles such as Royal Match, Phase 10, and Clockmaker.

Partner events involve teaming up with friends or random players to complete tasks for rewards collectively. This format typically requires players to collect event currency through gameplay. Players can then use their earnings to spin a wheel or participate in a similar game to earn points and advance in the event. Another hallmark of the format is having separate event progress with each of your teammates. There is often a visual signifier for progress—for example, an object being gradually built, such as a cake being baked or an egg being hatched.
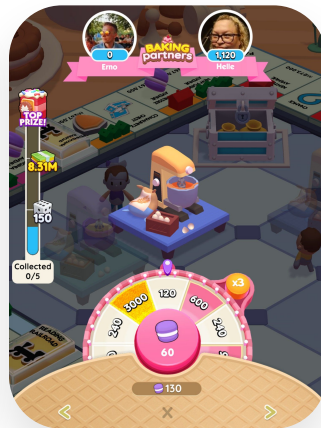
The one that started it all: MONOPOLY GO!'s original partner event involved players baking cakes together. Since then, several iterations of this event type have been launched with differing themes, like building cars or setting up a garden.

The addition of partner events contributed to a significant increase in MONOPOLY GO!'s baseline revenues during the summer of 2023. Revenue & downloads data (US, iOS) from the GameRefinery platform.

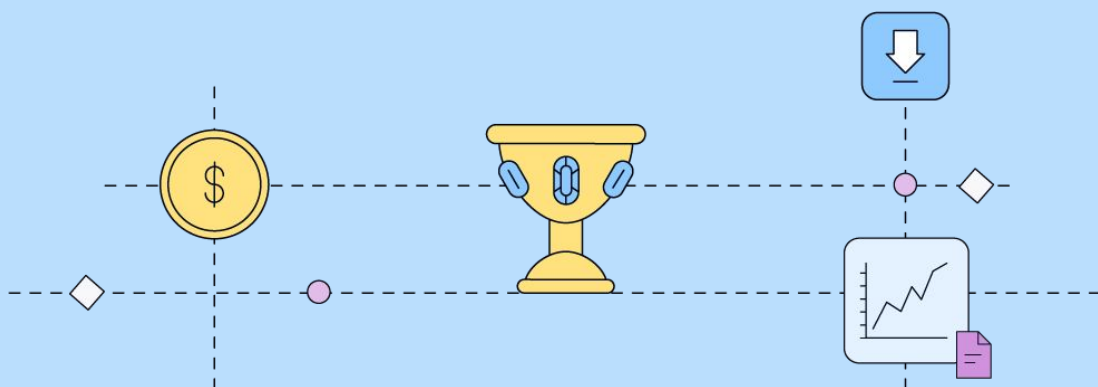# New Directions in Monetization

→ Fresh Approaches to In-App Purchases

◇ Trending: Pick-One Bundles
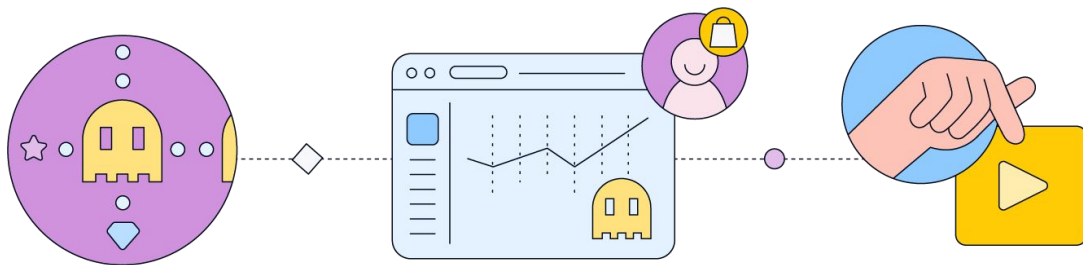
◇ Trending: Progressive Offers

◇ Trending: Engagement Offers

◇ Trending: Web Stores Spreading to Casual Gaming

Fresh Approaches to In-App Purchases

Just as there's ongoing innovation for new event types in the casual market, finding the next hit IAP offer format is a continuous effort. Whenever a fresh offer type with a new twist is introduced to the market, casual developers are quick to adapt it for their own titles.

In the past year, we've seen offer types like pick-one bundles take off, and ongoing trends like progressive offers continue to become monetization staples in top-grossing casual games. New offer types have also emerged, with engagement offers now building momentum and showing how innovation can come from outside the casual sphere.

Casual developers are also exploring monetization strategies beyond what traditional in-app purchases can offer. External web stores are now also trending in casual gaming.

"Great limited-time offers combine high-value content with a tight deadline, but urgency isn't the only way to drive conversions. Current offer trends give players a choice and more control. They allow players to accrue value for themselves by engaging. Or, they lay a clear path to the best offer by providing increasingly attractive options while still letting the players decide."

Mona Hietala
Game Analyst, GameRefinery, a Liftoff Company

Trending: Pick-One Bundles

Pick-one bundles have been gaining more traction in 2024. We've seen several high-performing casual games add this offer type to their bundle selection.

The most common format for pick-one offers features a small selection of bundles at different price points. They usually include a special discounted price for purchasing all of the bundles at once, motivating players through a more attractive offer.

As the name suggests, these bundles entice players to buy by giving them an option. They can purchase only one of the bundles on offer or opt for the whole set, making the discount extra attractive. These offers can also appear without the buy-all option.

From left to right: Pick-one bundles in Triple Match 3D, Frozen City, and MONOPOLY GO!.

These examples also highlight a trend in the visual design of the bundles, with the most common format including three vertical bars of different heights, displayed in ascending order.

Trending: Progressive Offers

Progressive offers were first introduced by Royal Match in June 2021, and over the past 12 months they have managed to saturate the casual space.

Out of the US top 25 casual games, approximately 70% have some form of progressive offer. Approximately 50% have introduced it as a new feature during the past 12 months.

The idea in these schemes is that a string of offers alternates between free-to-claim rewards and real money purchases. But, you can only purchase/claim the offers one after the other in their order of appearance.

There are two archetypes of progressive offers:

The first, "endless offer," generates new steps for as long as the user is willing to buy them, with smaller rewards per step.

Idle Lumber Empire, for example, has a unique variation that has rewarded ads on certain tiers of "endless offers."
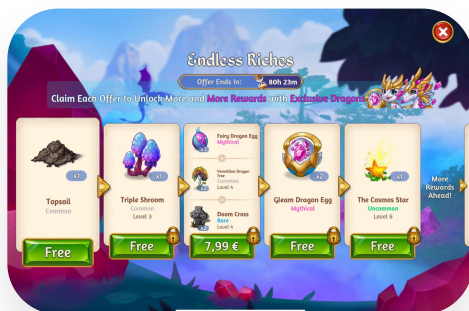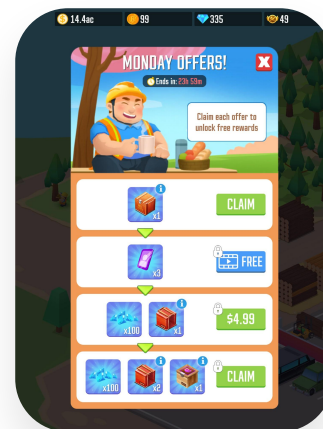
The second, "set step count ladder," usually has bigger bundles at each step.

Merge Dragons! added their first progressive offer in August 2023, along with an exclusive dragon breed only available as a threshold reward from their Endless Riches progressive offer.

In May 2023, BTS Island massively overhauled their monetization LiveOps. They applied both the "endless" type offers and 5-step offers with two selectable bundles on each step.

Trending: Engagement Offers

Engagement offers are a new, dynamic IAP format in casual games. They first appeared on our radar in late 2023 and gained traction quickly, with several casual games adding engagement offers in early 2024.

The core idea of engagement offers is to give players a better deal the more they play. They incentivize players to complete small tasks in exchange for:

◆ Access to a great deal

◆ Increasing their discount percentage

◆ Unlocking premium rewards

◆ Adding more content to their purchase

This versatile offer type blends elements from Battle Passes, Piggy Banks, and paid progression plans, combining elements from across genres. They also add an engagement layer while still keeping the deals uncomplicated and casual. Engagement offers can tap into FOMO to push rewards, injecting a sense of urgency by keeping offer durations short.

Mr. Toffee's Offer in Candy Crush Saga lets players collect stars from their regular level progression to unlock enticing offers.

Coin Master implemented different types of varying engagement offers. In Chop the Price, players can increase their discount percentage by collecting hammers, and the progress pack format offers players premium rewards for completing specific tasks.
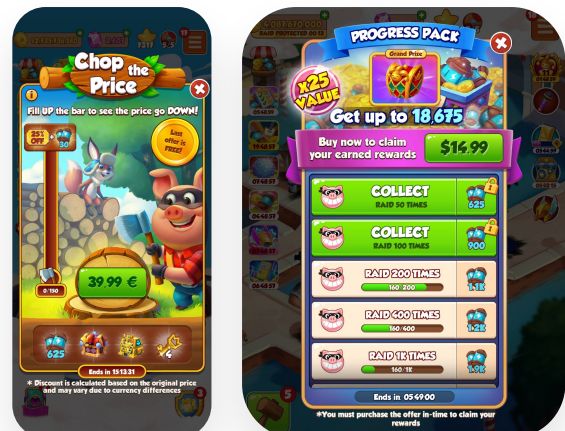
# Trending: Web Stores Spreading to Casual Gaming

When external web stores began emerging in 2022, mainly midcore developers jumped on the opportunity. However, an increasing number of casual developers are now exploring the potential of circumventing platform fees from app stores.

External web stores can offer players better deals when making purchases by letting them buy directly from the developer's own platform instead of purchasing in-app.

In addition to great deals, casual gaming web stores have also found clever ways to attract and convert players into payers. These include:

◆ Daily or weekly free gifts claimable exclusively from the web store

◆ Welcome gifts

◆ Web-exclusive offers

◆ Extra content in bundles

◆ First-time purchase discounts

Scopely's Yahtzee With Buddies! Online has an especially robust web store. It includes welcome gifts, progressive daily login rewards, and a separate loyalty point program for web purchases.
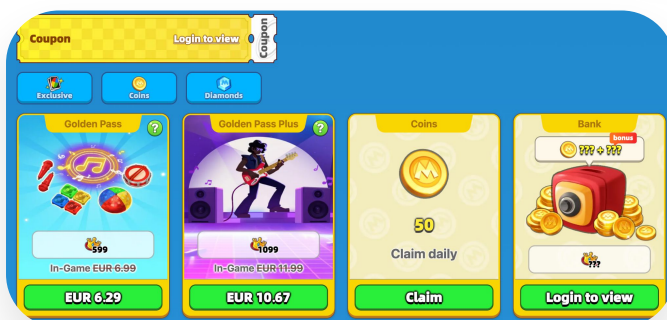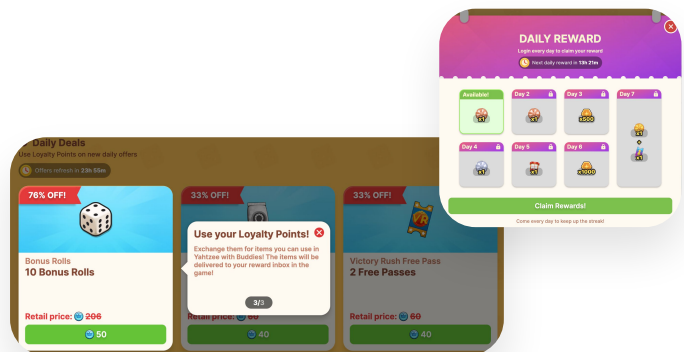
Mattel has implemented web stores for all their mobile card games. The web store for UNO! offers players daily gifts and web-exclusive offers, some of which can only be accessed by logging in to the platform.

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