



Casual Gaming Apps Report

The State of Play in 2021



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Introduction

While the global outbreak of the coronavirus stalled growth across much of the entertainment industry, gaming bucked the trend. From PCs and consoles to smartphones, gaming benefitted from an influx of players searching for new ways to pass the time in self-isolation.

Mobile gaming saw the biggest gains of all. In addition to accounting for a massive share of time spent, mobile gaming spend by consumers [surged to new heights](#) (2.8x more than PCs and 3.1x more than consoles).

In retrospect, the COVID-19 lockdowns have opened immense opportunities for Casual Gaming. Last year saw titles, including *Among Us*, dominate downloads and top the charts. But the future path to profit will be marked by new twists and turns, amping up the pressure on marketers to test new models and embrace new metrics.

To ensure marketers respond to future challenges and engage global audiences whose appetite for snackable Casual titles is [typically greater than their loyalty](#), Liftoff distills data from over 246 million installs into actionable insights.

The Liftoff Casual Gaming Apps Report tracks costs, conversions and ROAS, lifting the lid on critical data to inform winning strategies for the year ahead. It also breaks down data by platform (iOS and Android) and spotlights regions, countries, and seasons marketers can target to get the most for their money.

Report highlights

Cost-per-install (CPI)



Casual Gaming install costs increased \$0.61 versus the previous period. Following a year of captive user attention, CPIs went up for all Casual Gaming genres. Lifestyle games, at \$2.57, is the most expensive of the three subgenres.

Region & Country



North American users are the most expensive to acquire. Casual gamers in APAC and EMEA provide good performance at a low cost. France, Germany, and Korea all feature relatively low CPIs and high ROAS.

Return-on-ad-spend (ROAS)



Casual Gaming ROAS fell as much as 7.5 percentage points compared to the previous year, reaching 10.6% on Day 7 and 29.6% on Day 30. Out of the three genres analyzed, Lifestyle titles generate the most ROAS on Day 7 (22.5%).

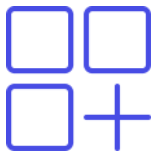
Platform



Marketers experimenting with Android and iOS are driving up install costs. Android saw a 120% increase in CPIs, while iOS CPIs increased by 47%. Comparing Day 7 ROAS performance, iOS performs slightly better.

Methodology

Date range: March 1, 2020–February 28, 2021



416

Apps



340B

Impressions



5.7B

Clicks



246M

Installs

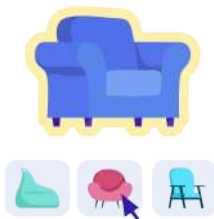


231M

Events

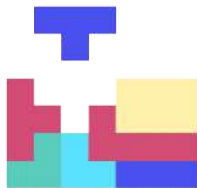
How we define Casual Game genres

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



Lifestyle

Lifestyle games include interactive stories (such as *Episode - Choose Your Story*), 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 objects (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, Simulations include 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 pet owner sims.

5 Casual Gaming trends

The market is in flux as mobile user acquisition enters a new chapter.



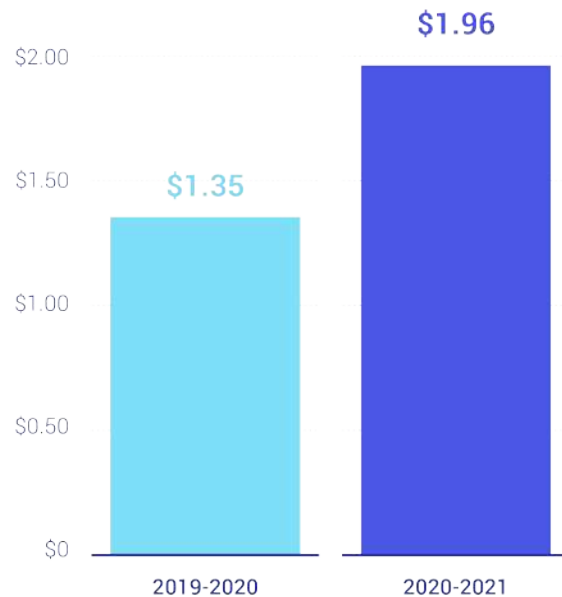
1 The audience for casual gaming is massive, but tough competition makes it hard for marketers to make an impression.

In the last year, CPIs for Casual Games rose 45.2%. The latest figure—\$1.96—reveals that marketers are spending much more to gain user attention. This increase occurred at a time when gamers were more engaged than ever before.

There are three main factors driving the increase in CPIs:

- Increased competition between game publishers jumping on the bandwagon.
- Highly distracted users who constantly cycle through gaming media. Live streaming, for example, is one of many popular pastimes for gamers.
- An increase in testing and spending as marketers prepare for post-IDFA scenarios.

Casual Game CPI, 2019 to 2021



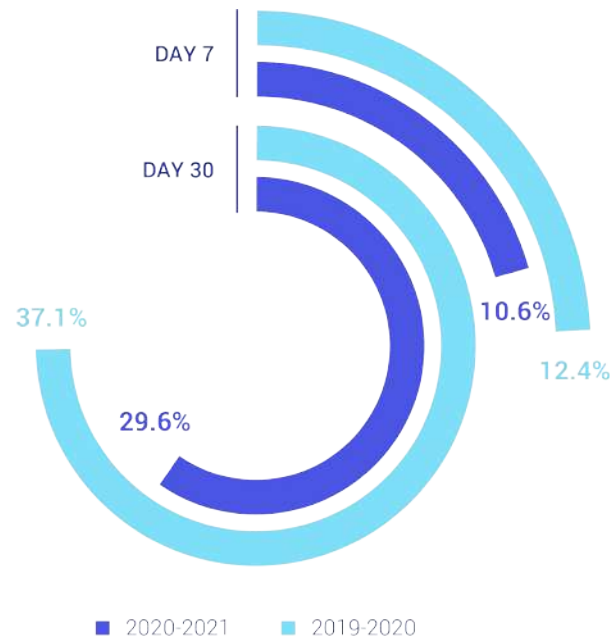
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ROAS rates fall as much as 7.5 percentage points compared to the previous year.

Users cost more to acquire and the payoffs are decreasing compared to the previous year.

- Day 7 ROAS decreased by 1.8 percentage points, down from 12.4% between 2019–2020 to 10.6% in 2020– 2021.
- Day 30 ROAS dropped significantly (by a total of 7.5 percentage points) from 37.1% to 29.6%.

Casual Game ROAS, 2019 to 2021



“In the Lifftoff App Trends 2020 report, D7 ROAS for all apps averaged 18.8%. Casual Games perform below the benchmark.”

Matt Hawes

Senior Business Intelligence Manager, Lifftoff

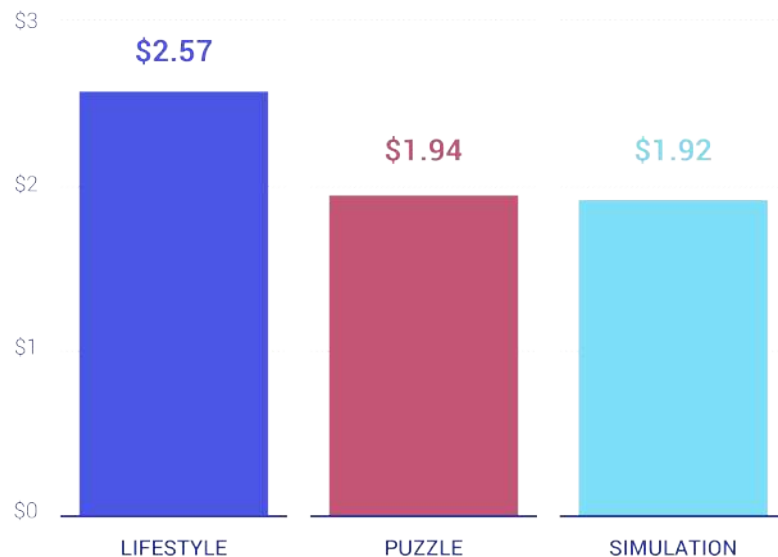
3

At \$2.57 per install, it's costly to convert Lifestyle gamers. Puzzle (\$1.94) and Simulation (\$1.92) have near-identical CPIs.

A 34% delta between the largest and smallest CPIs suggests there is little variance between casual gaming genres.

- **Lifestyle:** Narrative-driven games keep users for the long haul, but require marketers to work harder on their creatives to attract and retain. At \$2.57, Lifestyle is the most expensive, but potentially the stickiest.
- **Puzzle:** At \$1.94, this genre matches attractive CPIs with simple gameplay and mechanics that make conversion a breeze. But growing competition in the Match-3 sub-category is pushing app marketers to double-down on narrative features to keep audiences coming back.
- **Simulation:** At \$1.92, Simulation games combine the lowest CPIs with captivating gameplay that drives good performance.

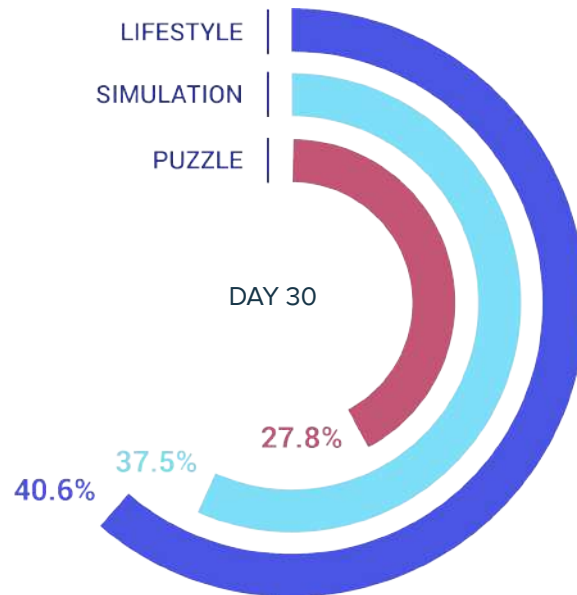
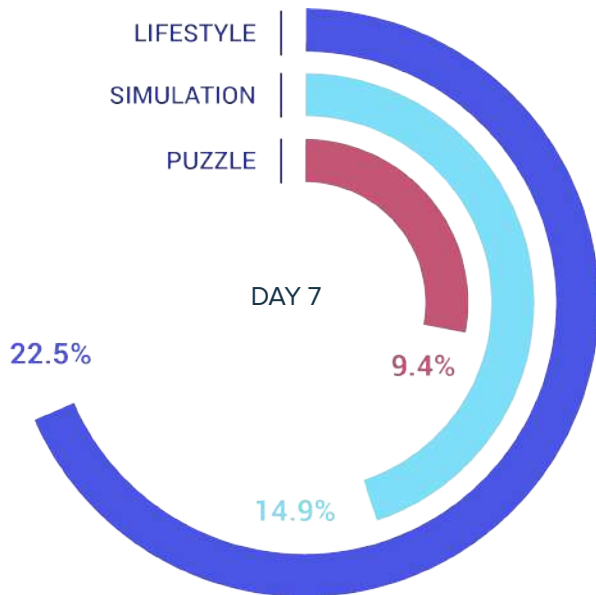
Casual Game CPI by Genre



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Which genre is the best bet? Lifestyle games. By Day 7, Lifestyle titles generate ROAS of 22.5%, 13.1 points above Puzzle games.

Casual Game ROAS by Genre

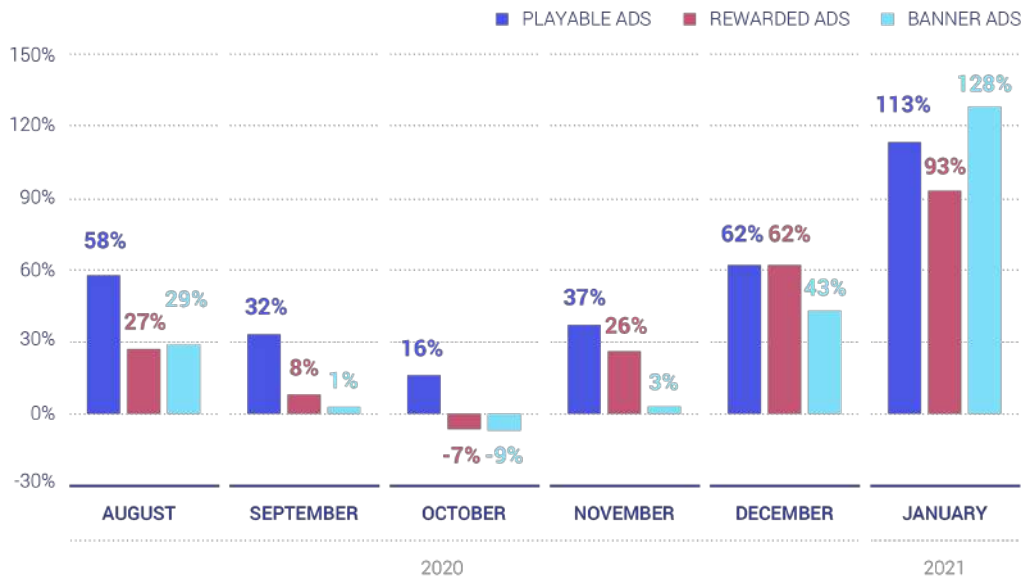


5

Playable ads delivered an unexpected boost to marketers, cementing their position as a must-use format in the mix.

- **Playables:** Gaming marketers flocked to playables, causing a massive 113% rise in use and popularity by the end of 2020. Overall, playable impressions increased by an average of 53% per month.
- **Rewarded:** A 2x rise in rewarded ads in January indicates users gravitated to games that gave them a bonus.
- **Banners:** The format made a comeback in January (128%), suggesting it's effective—provided marketers nail a creative that drives conversions.

Impressions by Ad Type, % Change vs. July 2020

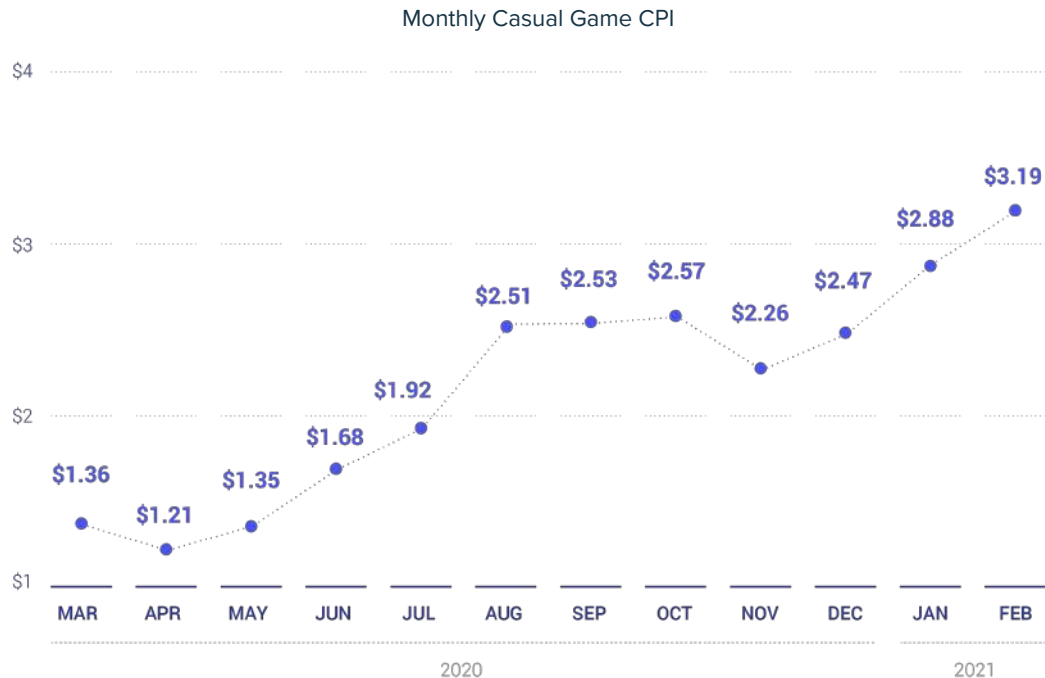


Monthly CPI trends

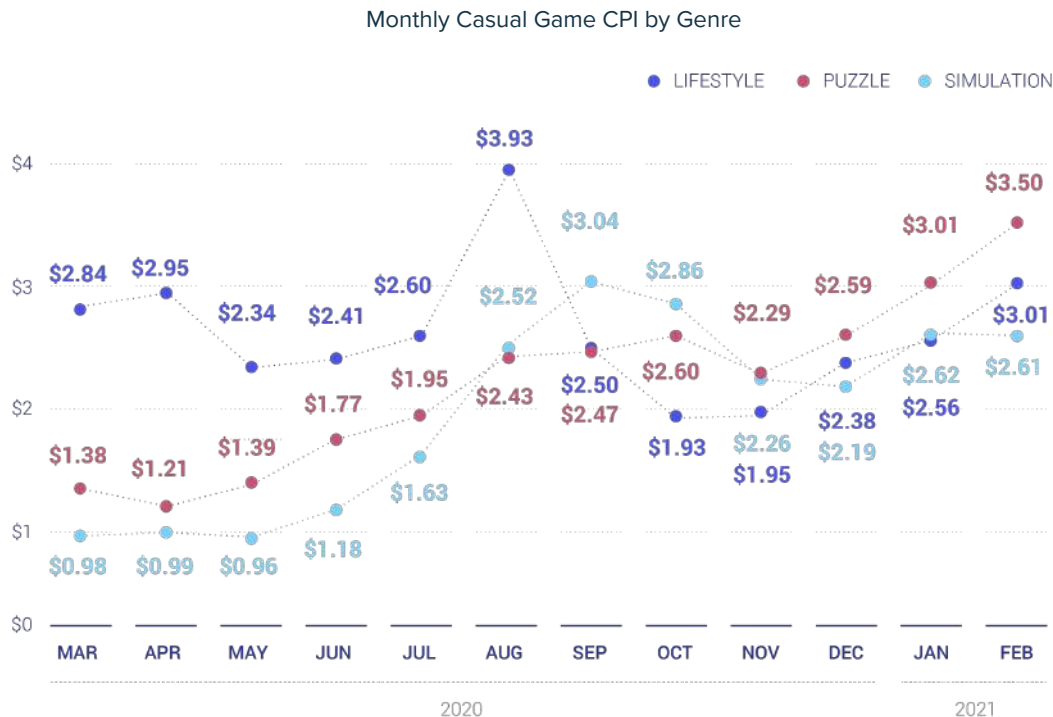
After hitting near-historic lows,
CPIs are once again on the rise.



In April 2020, COVID-19 lockdowns sent costs to their lowest levels of the year (\$1.21). Since then, CPIs rocketed by over 2x to reach \$3.19 in February 2021.



Puzzle and Simulation saw CPIs increase. But Lifestyle costs remained relatively constant, with a 6% rise from the beginning to the end.



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It's hard not to be enticed by cheaper inventory during certain periods. But marketers need to think about incremental lift. Ask yourself: “Should we be spending this?” Find out if there is a change that justifies the spend. If there's not, it's just cheaper CPMs. That doesn't necessarily mean you should spend more.

Jayne Peressini

Senior Director, Mobile Marketing and Growth



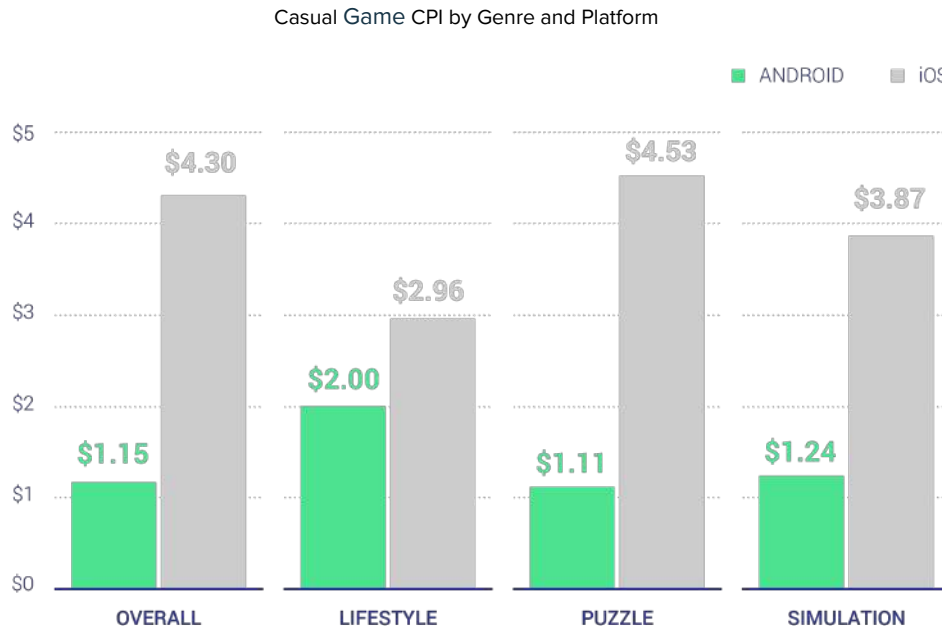
The platform wars

With marketers unsure about how IDFA deprecation may play out, there's never been more experimentation to find the best platform fit.



Comparing CPI by platform, the overall difference between Android (\$1.15) and iOS (\$4.30) is \$3.15.

- **Lifestyle:** With CPIs differing by only \$0.96 between platforms, Android (\$2) costs are much closer to iOS (\$2.96) than other genres.
- **Puzzle:** At \$4.53, iOS Puzzle players cost more than 4x those on Android (\$1.11).
- **Simulation:** At \$3.87, iOS users are 3x more expensive than Android (\$1.24)



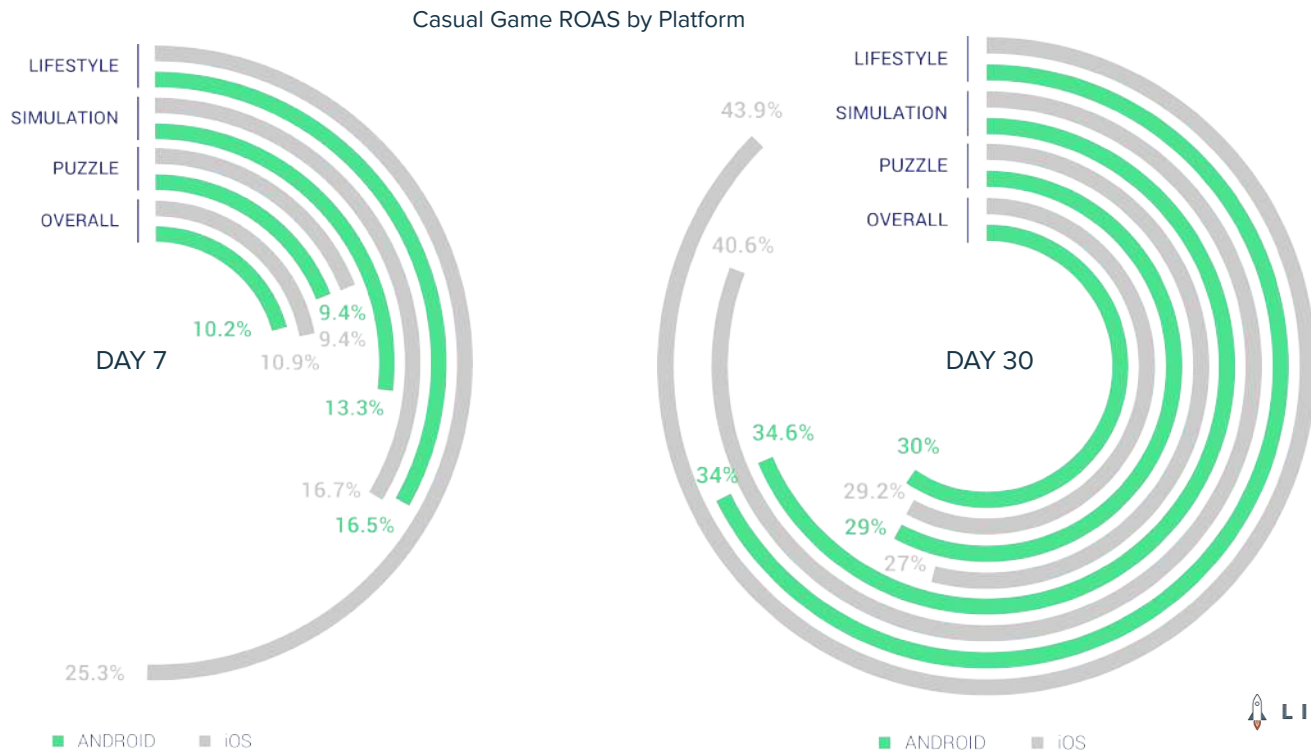
Year-on-year changes show marketing is shifting toward Android.

- Android experienced a 120% increase in cost in a year, from \$0.92 in March 2020 to \$2.02 in February 2021.
- iOS costs increased by 47%, from \$3.28 to \$4.82.
- Though iOS costs are higher, Android's rate of increase is steeper. This rise could indicate that Android is attracting marketers in advance of IDFA changes.

Casual Game CPI Change in 12 Months, by Platform



ROAS performance across platforms is strikingly similar for Puzzle games on Day 7. By Day 30, Lifestyle on iOS shows the best value.

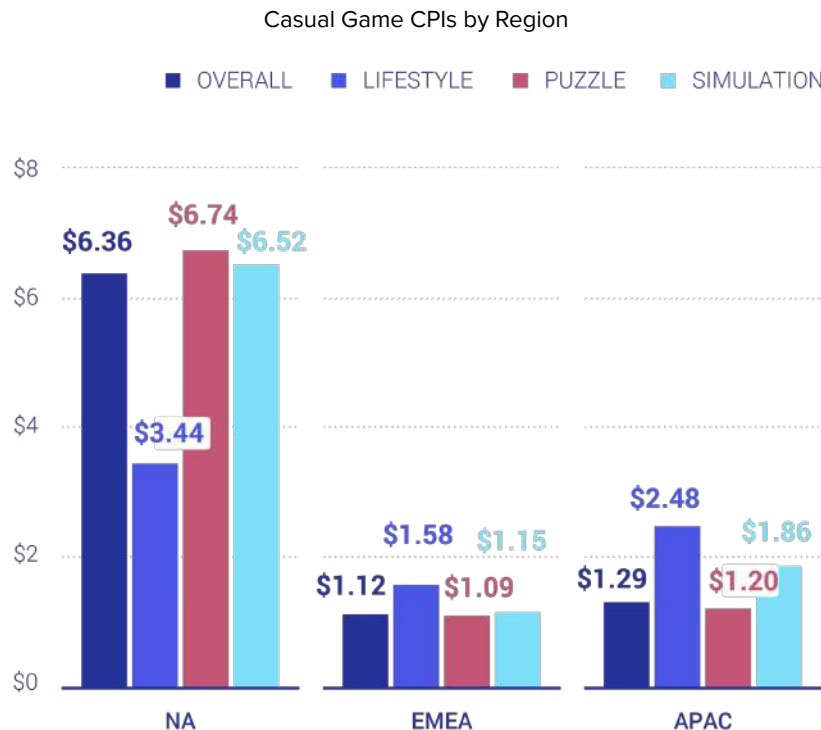


Region and country trends

It pays to go global as countries such as France, Germany, and Korea, offer a world of opportunity.

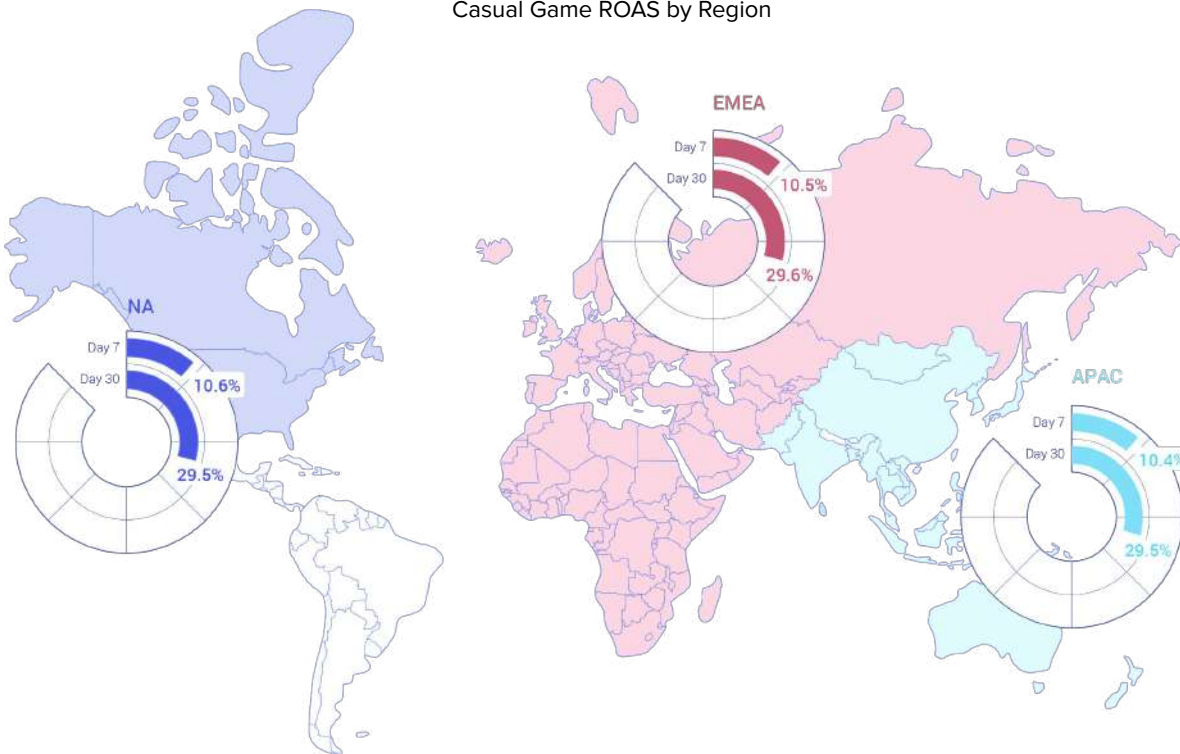


CPIs across categories tip the scale in North America. In APAC and EMEA, it costs less to win an install.

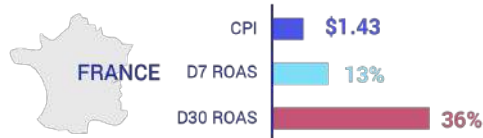
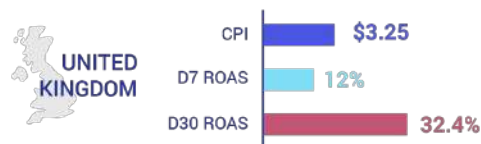


D7 and D30 ROAS performance is uniform across regions, suggesting a universal interest in playing Casual Games.

Casual Game ROAS by Region



Meanwhile, global competition for players puts pressure on companies to find uncontested markets.





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Localization can make or break monetization. Something as small as identifying the right country currency can give you a competitive edge. Just research, test and see.

Amos Adler

Director of UA

SciPlay

Author takeaways



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As user acquisition practices are changing, marketers have to be less granular in their approach. To level up your marketing, lean on creative experimentation. Make it your mission to find the best mixture of format and content that works to convert large cohorts.

James Haslam

Senior Marketing Insights Manager



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Liftoff is a complete mobile app marketing platform that helps companies acquire and retain high-quality app users at scale. We use unbiased ML to find all the best users for your app, creative tech to deliver the most engaging ad experience, and a unique cost per revenue model to optimize for your LTV goals.

Liftoff is proud to be a long-term partner to leading brand advertisers and app publishers since 2012. Headquartered in Redwood City, Liftoff has a global presence with offices in New York, Berlin, London, Paris, Singapore, Seoul, and Tokyo.

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