

GameRefinery
A Lifftoff Company

Casual Gaming Trends Snapshot Report

March 2022



GameRefinery uses a three-layered approach to categorize games

- Using a **Category → Genre → Subgenre** hierarchy we are able to differentiate games in a meaningful way and offer accurate insights for all individual game types currently found in the market
- Our taxonomy is **created together with industry experts** and is based on thorough testing and data-analysis of the market
- In this report we are focusing on the latest Casual gaming trends.



GameRefinery's Genre Taxonomy

Casual gaming trends overview



Wilhelm Voutilainen
Chief Game Analyst - US

Competition in the Casual gaming market is fierce. Making it into the top-100 grossing charts has never been more difficult, but keeping your place once you've made it into the charts is even harder.

To stay afloat in this competitive market, mobile game developers are having to get creative as they come up with new ways to keep players engaged and motivated. Mobile game players are constantly looking for new ways to play, and casual game developers have responded with an explosion of innovative ideas, many of which are transforming how we see traditional casual game genres.

As an example, around 70% of the US top-100 grossing Match3 games feature meta elements, allowing players to move outside of the core gameplay and dive into exciting new gameplay mechanics, whether that's platforming mini-games, collectibles or even RPG features.

Similarly, we're seeing construction and renovation elements popping up in more Casual games, as developers craft new features that satisfy player motivations to complete milestones, customize and decorate. Finally, social features and communities in casual mobile games have surged in popularity since COVID, and we see no sign of this trend slowing down.

Using data from the GameRefinery platform, this report shows which casual mobile games are dominating the charts and why. If you're a mobile game developer looking to add something new into your casual game, you'll find plenty here to inspire you.



Key points



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Chief Game Analyst - US



- Mobile game developers are tapping into meta elements and experimenting with new gameplay features to increase player retention and broaden appeal, all while opening up new monetization options.
- All of the US top-100 grossing iOS games from the last two years utilize renovation elements.
- Meta elements are now an essential part of successful casual games. 70% of the US top-100 grossing iOS games feature meta elements.
- Renovation and construction features are some of the most popular meta elements. Construction elements appear in 49% of the US top-100 grossing iOS Match3 games, compared to 7% six years ago.
- Minigames and special playing modes are appearing more frequently in top-grossing Casual games, providing new experiences and features to players outside of the core game mode.
- Social features and building communities are becoming more popular in traditionally single-player genres. The best performing Match3 titles have started increasing competitive elements in their games, resulting in a higher appeal to competitive motivated players.











Market

What does the US Casual mobile gaming market currently look like?



Top games and their current market share within the Casual genre in US iOS

Key takeaway: The top three Casual games have remained the same when we compare the Q4/2021 and Q4/2020 quarters, but as we move down the list, we start to see changes. Back in Q4/2020, the top 10 list of Casual games included the Match3 game **Toy Blast** (2.14% rev share) and the Customization game **Design Home: Dream Makeover** (1.56% rev share). However, they have had to make room for two new Casual games during 2021, as **Royal Match** and **Project Makeover** have taken market share from other top Casual games.

2021 Q4					2021 Q4				
	Rev	Change	DL	Change		Rev	Change	DL	Change
 1. Roblox Roblox Corporation Sandbox	12.06%	+0.17	2.78%	+1.24	 6. Toon Blast Peak Games Match3 Puzzle	3.5%	+0.38	0.13%	-0.08
 2. Candy Crush Saga King Match3 Puzzle	8.86%	+2.13	0.56%	+0.05	 7. Gardenscapes Playrix Match3 Puzzle	3.47%	-0.6	0%	-0.42
 3. Pokémon GO Niantic, Inc. AR/Location Based	4.92%	-1.51	0.5%	-0.1	 8. Project Makeover Magic Tavern, Inc. Match3 Puzzle	3.44%	+2.17	0.96%	-0.6
 4. Royal Match Dream Games, Ltd. Match3 Puzzle	4.25%	+4.25	0.55%	+0.55	 9. Candy Crush Soda Saga King Match3 Puzzle	3.17%	+0.57	0.16%	+0.06
 5. Homescapes Playrix Match3 Puzzle	3.99%	-0.9	0.21%	-0.4	 10. Fishdom Playrix Match3 Puzzle	3.1%	+0.45	0.16%	-0.16

Top games and challengers in the Casual genre (US iOS)

Key takeaway: What all the US top-grossing 100 Casual games released in the last two years have in common is that every one of them utilizes **renovation elements**. Also interesting is that of the Casual games released over the last 180 days, only **Beatstar** has been able to sustain its position among the top-grossing 200 games in the long run (*Happy Clinic was released at the end of Jan 2022, and Merge Fable has been in and out of the US top-grossing 200 since its release*). This likely relates to new games' scaling challenges in the post-IDFA world. Beatstar has been able to utilize brands to push its marketing (*real song licenses*).



The Casual genre's superhits in the past 12 months

- what are they all about?



Zen Match - Relaxing Puzzle

Analyst's Overview

Our analyst's key takeouts

Genre & Style

Zen Match is a mahjong style puzzle game, where **player matches puzzle tiles together on a mahjong -like board** and **designs interior styles for rooms**. The game has a relaxing atmosphere through its audiovisuals and a realistic art style in the designable rooms.

Features & Progression

- Progressing through **mahjong -style matching puzzles**
 - **Special daily mode levels**
- Collecting **currency** from levels to **design Zen rooms**
- **Upgrading plants** by playing the special daily mode levels
- Collecting **decorative backgrounds**
- **Simple recurring events**
 - **Tournaments**

Monetization

IAP

- **Consumable boosters** to help in completing levels
- **Purchasing continue** instead of giving up when failing a level
- **Purchasing more lives** instead of waiting for refill

- **Piggy Bank**
- **Removing ads**
- **Limited time offers**

Ads

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

Special Notes

The game differentiates in the puzzle space by having an innovative mahjong/matching core gameplay combined with interior design meta elements.



Source: GameRefinery SaaS platform

The Casual genre's superhits in the past 12 months

- what are they all about?



Beatstar (Part 1)

Analyst's Overview

Our analyst's key takeouts

Genre & Style

Beatstar is a sleek and simple three-laned rhythm game intended for phones (recommended to be played with **both thumbs**). Gimmicks in gameplay include long tiles and swipes.

As a twist to **gameplay**, all of the songs get progressively difficult towards the end: Beatstar tiles appear periodically in songs and mark a slight speed up and a bump in difficulty. Tap accuracy is measured on a scale of great, perfect and perfect+ where perfect taps will carry on a streak and a great ones will break it. Keeping up a streak will also light up the screen with the song's color and trigger rhythmic visualizations. Any missed tap will end the song.

Features & Progression

- Players make progress by collecting star scores on songs. The scores build up and **open up more features and rewards**
- New songs are acquired from **song boxes** that can be opened by collecting a set amount of box cards from gameplay. Boxes require more cards for every box opened for a genre (first box of rock genre is 5 cards, the next one 10 cards and so on)
- Playing songs is rewarded with Beatcoins that fill **unlock slots** for song cases (containing box cards)
 - One slot needs 300 Beatcoins to get filled
 - Box unlock times usually range from 3 to 9 hours
 - Only one box can be set to unlock at a time

Source: GameRefinery SaaS platform

The Casual genre's superhits in the past 12 months

- what are they all about?



Beatstar (Part 2)

Features & Progression

- A **wide selection of songs** from different genres, players can also select their favorites from available songs to pull from a **Wishlist Box**
- Hard and extreme songs available separately
- Four-hour venue events that match players on the same level for a points contest
 - Energy mechanics only for events
 - Stars as rewards
- **Highscore lists** for local players and friends for social gaming

Monetization

- A **refreshing shop** for song boxes and **limited-time song offers**
- **Gem packs** (premium currency)
- **Monetized retry**
- **Skipping unlock time** with gems
- **Ads** for skipping unlock times, for song cases and for daily free gems in the shop

Special Notes

An immersive audiovisual experience. The UI changes color depending on which song is selected (different genres have different colors). The colors are also carried over to song gameplay, where streaks build up the rhythmic and colorful visualizations.

Source: GameRefinery SaaS platform

Meta elements have become a more essential part of Casual games



Source: GameRefinery SaaS platform

The popularity of Match3 games *without* meta elements



Over six years ago, over 90% of the US (iOS) top-grossing 100 Match3 Puzzle games did not contain any meta-elements. Today, about 70% of the US top 100 Match3 games have adopted at least some sort of meta elements as part of their gameplay (source: GameRefinery SaaS).



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Chief Game Analyst - US

Traditionally, casual games have been all about core gameplay:

- Easy to learn → get into the game right away
- Easy to hop in and out → a way of relaxing/spending time
- They don't require too much effort to play and enjoy

Moreover, their focus has been on monetizing the core game:

- Boosters to reduce the difficulty
- "Continues" to avoid losses
- Extra lives/energy to continue playing

Now we're starting to see meta elements become an essential part of casual games. This is due to the maturation of the casual mobile game scene and the popularity of [the hybrid game design](#). Midcore elements especially have found their way into casual games (and vice versa). That said, the core game is still the primary focus in casual games, but introducing more meta elements has opened ways to bring more sense of progression and diversity for the players.

Why add **meta-elements** – three reasons to consider



1. Differentiate and surprise

Mobile games have now established themselves among “average consumers.” This means that even the most casual gamers are ready and looking for new things and additional layers in their games. Introducing meta elements adds possibilities for differentiation and a deeper gaming experience.

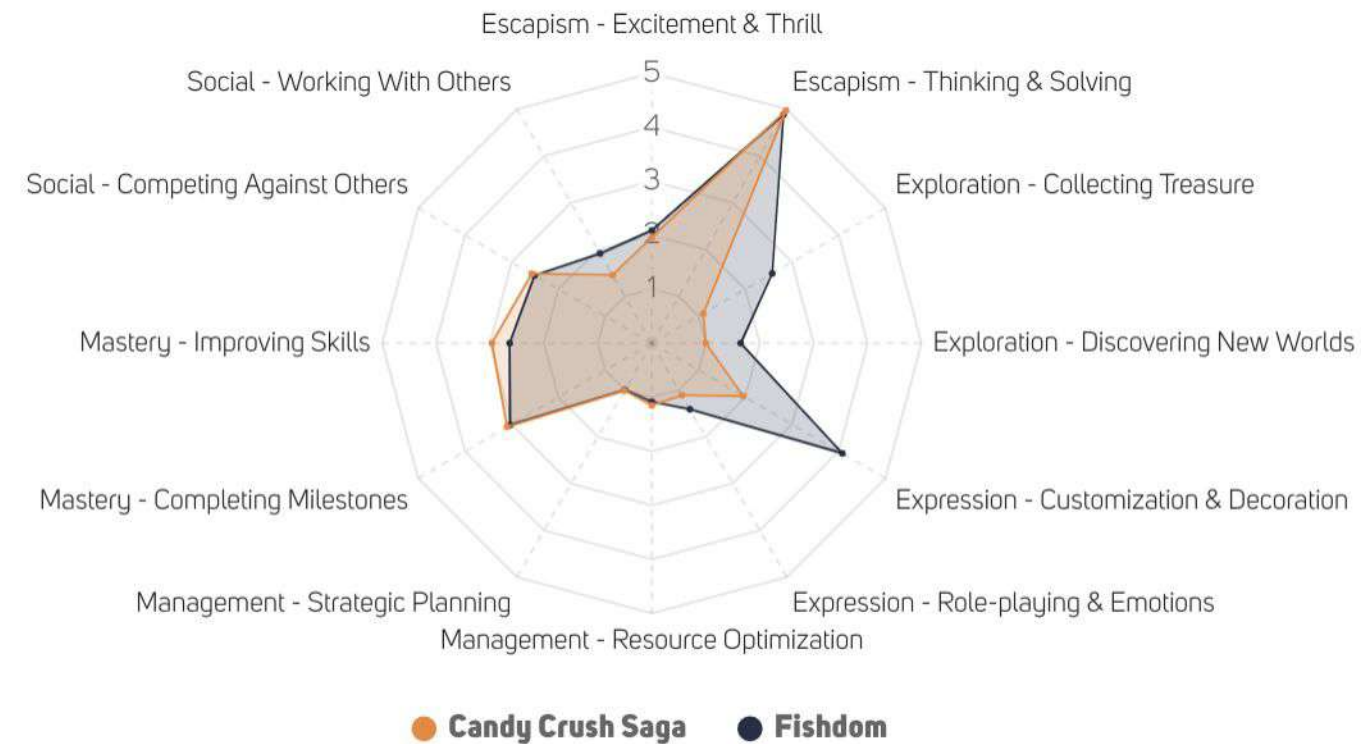
2. Increase “sinks” and monetization

Adding meta elements also opens up doors for additional monetization sinks. For example, collections and customization elements don’t affect the core game, so there’s no fear of “pay to win” or unbalance issues.

3. Broaden motivational appeal

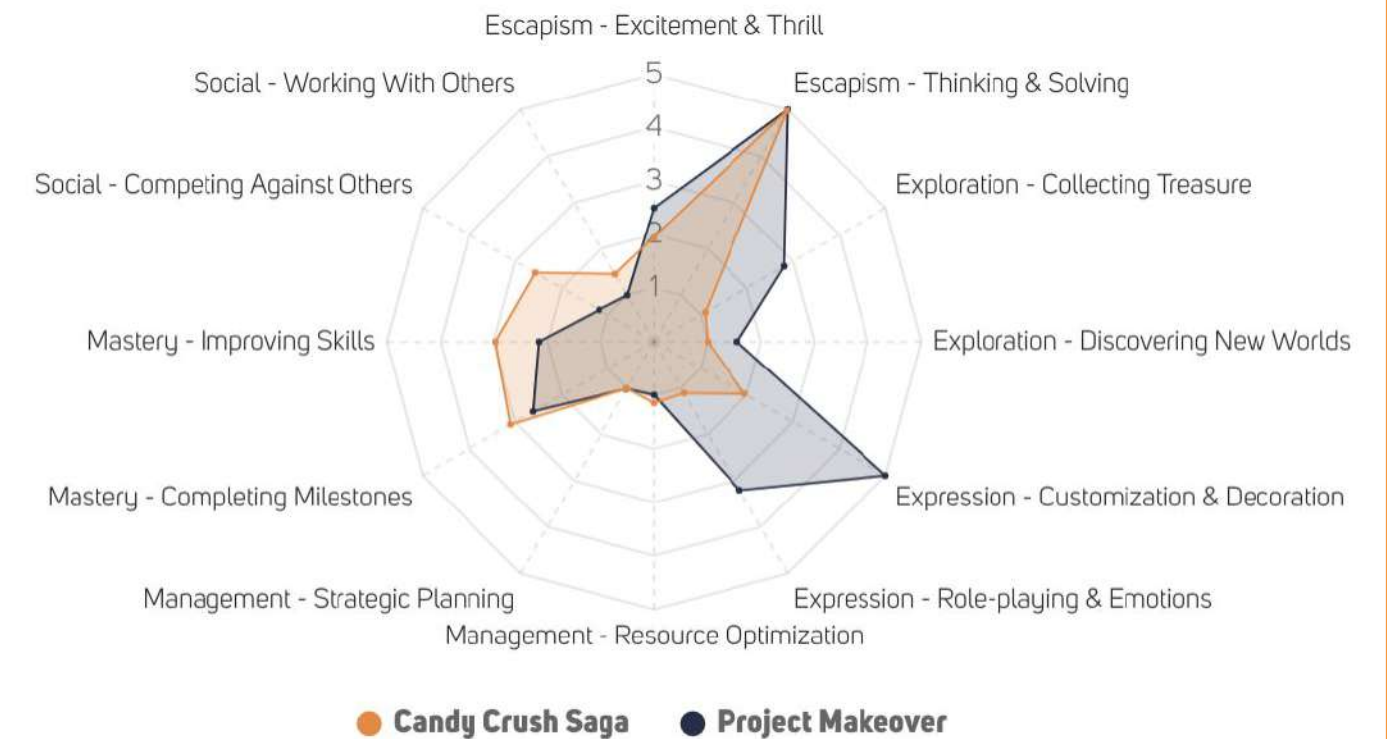
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Many top **Match3s** succeed by differentiating with new motivational drivers



Fishdom's collection/decoration meta brings **an extra "motivational angle"** to compete against Candy Crush Saga, as shown in this motivational emphasis graph.

In other words, Fishdom appeals to **a wider set of motivational drivers** and is more likely to lure in new types of players driven by **Exploration** and **Expressional** motivations.



Project Makeover found success by switching the angle to "episodic" home design and a dress-up approach, which tap heavily into both **Customization & Decoration** and **Role-playing & Emotions**.

Another major differentiator is the avatar system for players, giving players a more direct sense of "you" in the game's world.

Casual Game Trends

What mobile game design trends
are buzzing in the market?



Trend #1: Renovation and construction elements have become one of the most popular meta-features among the top-grossing **Casual games**



Lily's Garden



Project Makeover



Royal Match



Solitaire Home Design



June's Journey



The popularity of construction mechanics in top Match3 games
(US iOS, source: GameRefinery Saas Platform)

The number of top-grossing 100 Match3 Puzzle games that have constructing meta mechanics has gone **from 7% to 49%** in just over six years!

Constructing mechanics = Constructing and/or upgrading permanent buildings or areas (e.g., your base or city) is an important part of the game, e.g., buildings can generate resources for players.

Renovation mechanics = Decorating permanent or non-permanent buildings or areas is purely cosmetic, i.e., buildings do not give additional benefits for players.



What is so great about renovation and constructing elements?

Source: GameRefinery SaaS platform



Some of the Casual players' key motivations that are behind the popularity of renovation elements.



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- **Meta layers such as renovating and constructing bring gamers an additional sense of progression.**
 - Taps into the psychological satisfaction players get from progressing and completing long-term goals.
 - Players get to see their progression visually when completing a renovation or constructing tasks.
- **The core idea of "cleaning up" or "getting things done" is a powerful motivator for player engagement.**
- **Broaden motivational appeal.**
 - Renovation and constructing elements tap into several top player motivations among Casual gamers.
- **Renovation meta fits almost any kind of core gameplay.**
 - It doesn't affect the balance of the core gameplay.
- **Renovation elements have proven to work great for ad creatives.**

The popularity of **construction elements** among top-grossing 200 Casual games released in the last two years



Looking at the US top-grossing 200 games released over the last two years, we can see that eight of the 14 Casual games contain construction elements (game icons with turquoise border). Four of the six Casual games in the US top-grossing 100 have construction mechanics, and while **Redecor** and **Zen Match** do not contain construction elements, they can be classified as renovation games as interior design plays an important role. (See *construction and renovation term descriptions on slide 15.*)

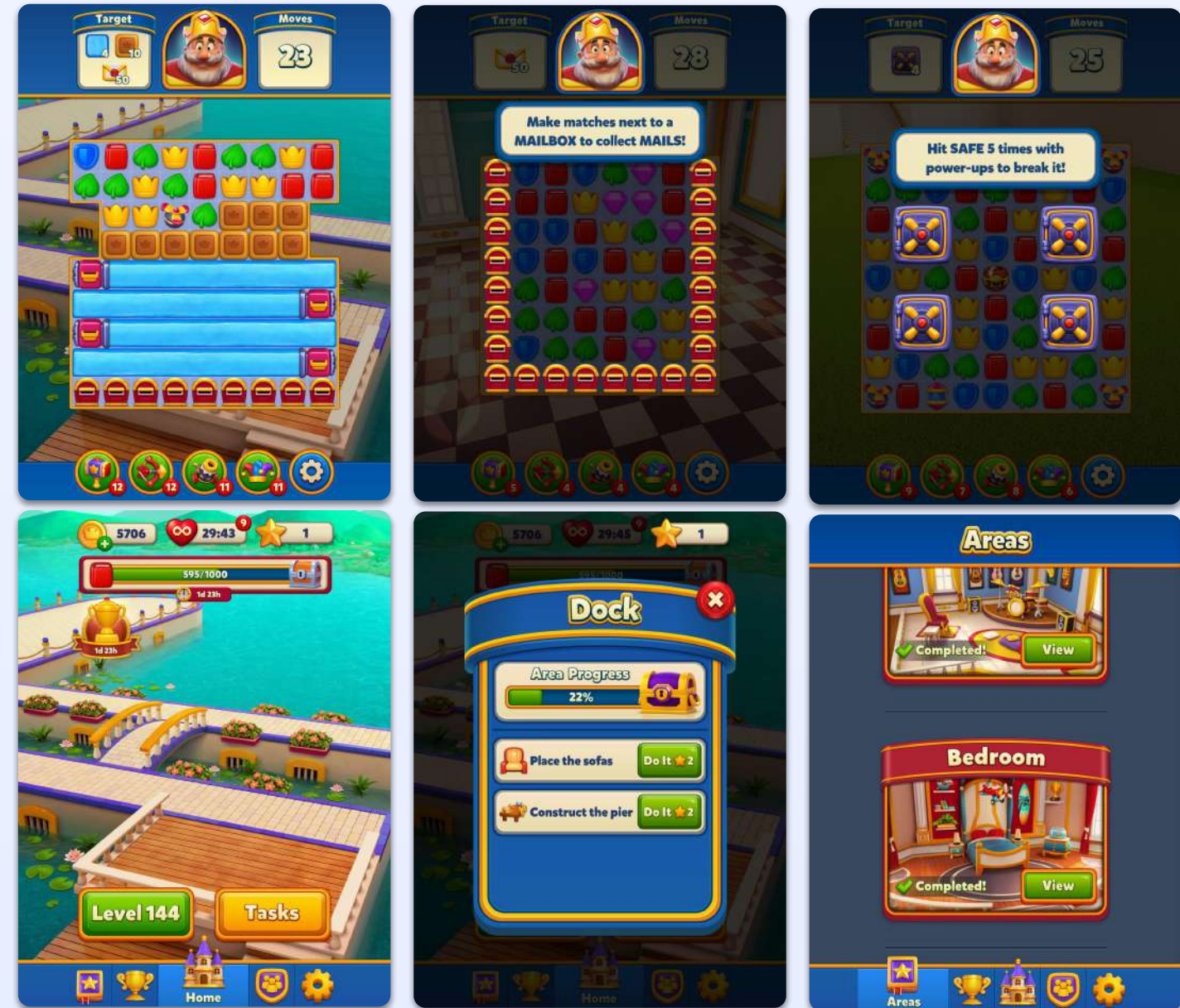
Examples of various core + construction/renovation meta combinations



Royal Match

Royal Match is a polished Match3 game with classical swapping mechanics and a cartoonish "royalty" theme. Completing puzzle levels with various goals earns players stars, and these stars are used to complete tasks (renovating different rooms). When every task from a single room has been completed, players can move to the next one.

Compared to Homescapes, renovating rooms is more simplified since there are no player choices on how to renovate different rooms (vs. Homescapes' "choose from three options").



Source: GameRefinery SaaS platform

Examples of various core + construction/renovation meta combinations



Solitaire Home Design

Solitaire Home Design is a solitaire puzzle game where players renovate a mansion on an island, engaging in narrative storytelling and completing side game/event options. Players gain glovers by playing solitaire-inspired card puzzle gameplay levels, which they use to progress in the game's story and renovate the mansion/island.

The game's twist is that the player only gets glovers by having winning streaks on completing levels, which taps into players' loss aversion motivation and encourages players to buy boosters and chances to retry a failed level.



Source: GameRefinery SaaS platform

Examples of various core + construction/renovation meta combinations



Zen Match

One of the newer Casual games is Zen Match, a mahjong-style puzzle game with renovation elements. Players match puzzle tiles together on a mahjong-like board to collect currency, which they use to design interior styles for rooms. The game has a relaxing atmosphere through its audiovisuals and a realistic art style in the designable rooms.



Source: GameRefinery SaaS platform

Rise of renovation events in mobile games



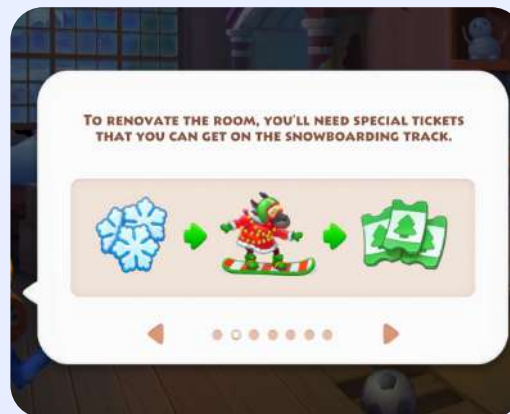
Construction
/renovation
meta



Event
format



Monetization
via
"renovation
pieces"



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We are also seeing these renovation elements implemented in games that you wouldn't typically associate with construction or decoration. For example, the popular card game, *Phase 10*, and the puzzle adventurer, *Best Fiends*, both use renovation elements in their limited-time events.

Renovation meta doesn't affect the balance of the core gameplay and it works very well in a limited-time format, so it can be fitted into any type of game as a new project for players to undertake. The desire to complete the project in time taps into Casual players' main motivational drivers, so the option to purchase "renovation pieces" is a great way to monetize these events.

Renovation event example - Card game Phase 10: World Tour

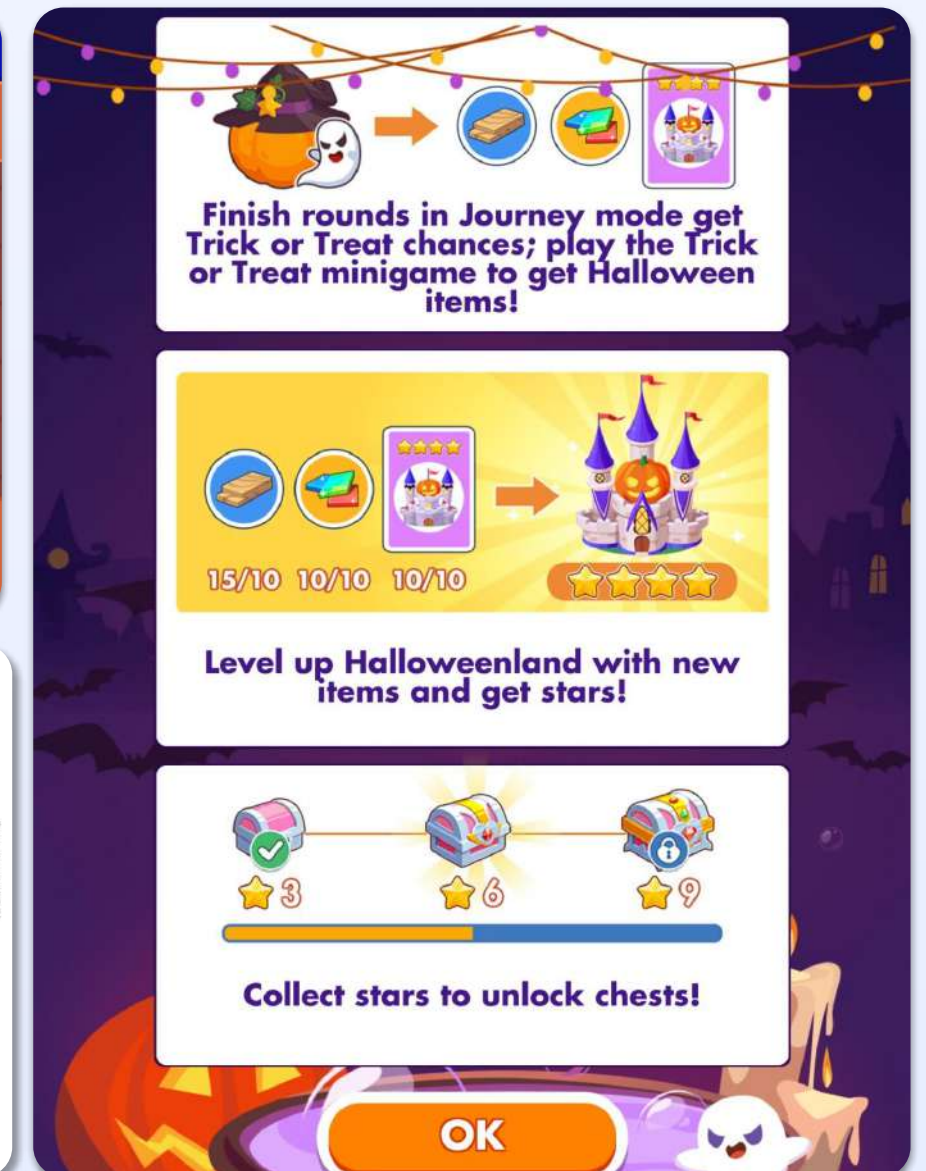
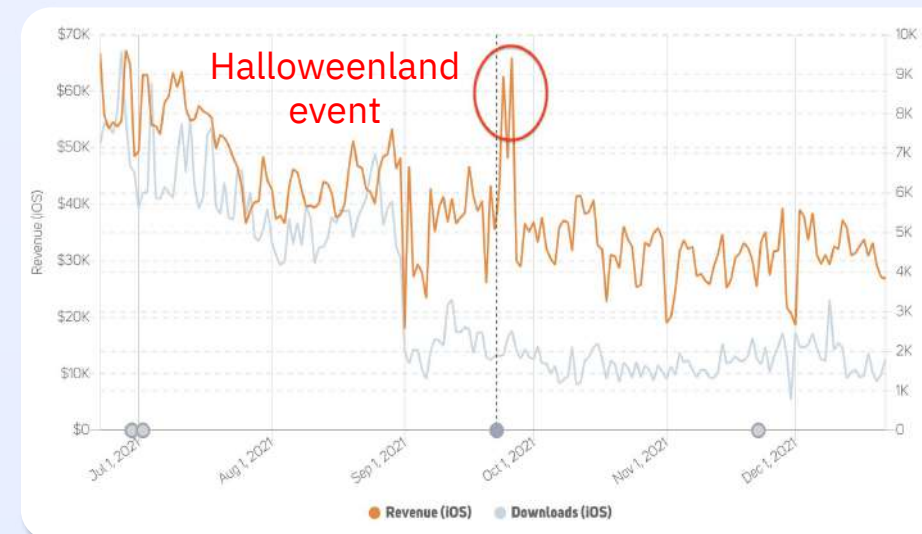


Phase 10: World Tours - Halloweenland

In the event, players built a Halloween-themed amusement park. Building or upgrading buildings required event material items that players gained by playing a special event gacha minigame and picking pumpkins that contained either a trick or a treat. Minigame tries were earned by playing the game's main mode, Journey.

The treats rewarded event materials, but if the player got tricked, the minigame ended and the gained rewards were lost. Failed games could be continued by using Candies, a special event currency which could be purchased with premium currency.

Building and upgrading various buildings awarded not only "visual rewards" but also Stars, which unlocked progressively reward chests consisting of boosters and special decorative items.



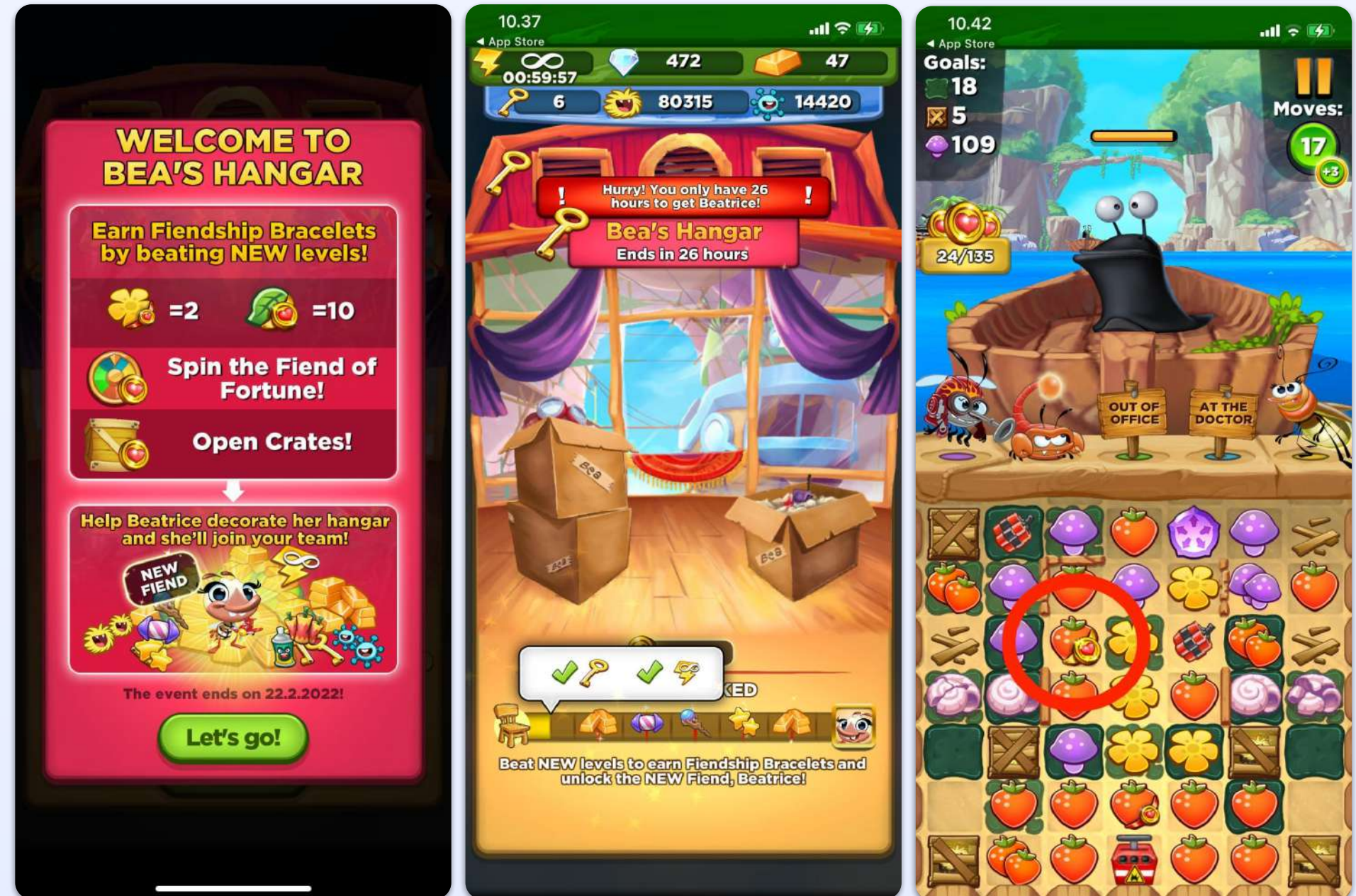
Source: GameRefinery SaaS platform

Renovation event example - Puzzle RPG Best Fiends



Best Fiends - Bea's Hangar event

In Bea's Hangar renovation event, players helped Beatrice the Hornet renovate her hangar. Renovation requires Friendship Bracelets, an event currency acquired by completing normal levels. The more the player managed to renovate the mansion, the better rewards awaited - the top prize being Beatrice herself joining your crew.



Source: GameRefinery SaaS platform

Trend #2: Minigames and special playing modes are popping up in the top-grossing games



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Besides renovation events, the other big trend in in-game event design is the utilization of core gameplay mechanics that differ from the game's usual ones. Examples include *Fishdom* and *Township*, which use minigame events unrelated to their regular gameplay.

The growing importance of these special game modes among casual games further proves that even casual players love to experience new things and have different playing modes to choose from. Special playing modes are an excellent way of giving players more meaningful core game content, and together with loose enough session length restrictions, they drive engagement and stickiness.

Why do minigames and special playing modes in events make sense?

Mixing up interesting core gameplay types adds variety to your game as well as a surprise element.



Great synergies with the event format as it allows for experimentation.



Minigames can be recycled across your portfolio.



Possible to include other game features: energy systems, leaderboards, etc.

Minigame event example - Match3 Puzzle game Fishdom



Fishdom - Road to Treasure event

Road to Treasure stages didn't have anything to do with Fishdom's regular core Match3 gameplay, as they were all about getting a little vehicle across the sea, using small platforms to build bridges upon. Bridges were built by holding down your finger, trying to match the length of the bridge so that it reaches the next platform (but doesn't go over it!). If the player managed to reach the other side, they got Cups which helped them climb the leaderboard and win rewards.



Source: GameRefinery SaaS platform

Minigame event example - Tycoon/Crafting game Township



Township - Spooky Halloween event

In Township's Halloween-themed Match3/Renovation event, players played so-called "blast/collapse" Match3 levels to get tickets that were used to renovate the "Halloween house." To make the event more engaging, the event featured narrative dialogue to tie everything together. The event's monetization was the same as in all the game's previous similar Match3 events, meaning players could purchase boosters/extra moves/lives, basically your usual Match3 monetization. Rewards were handed out to players when they reached certain milestones in the renovation process.



Source: GameRefinery SaaS platform

Trend #3: Social features and communities are becoming more popular and common in Casual games



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Players are looking for social interaction and a sense of "digital togetherness," which has resulted in the popularity of social gaming and playing together with other people (→ communities). That is why we're seeing even traditionally single-player genres, like Casual Puzzle games adding spaces where people can interact with each other.

The popularity of non-competitive co-op tasks in Match3 games



The popularity of guild mechanics in Match3 games



The popularity of chat/messaging feature in Match3 games



Source: GameRefinery SaaS platform

Three reasons why add **social features** in your game



1. They are one of the strongest retention mechanics

- Having friends and communities in the game increases player retention, even for casual gamers.
- Social mechanics, e.g., sending help to friends and communal team tasks tap on the social retention triggers of players, meaning everyone wants to carry their own weight so that they don't let others down.

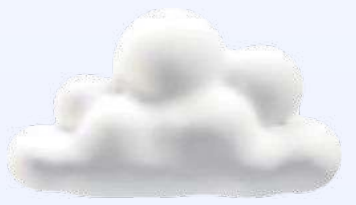
2. They enable new ways to bring horizontal content

- Team and other co-op mechanics are great ways to add more content, e.g. through communal events, co-op PvE modes, and competitions.
- More content opens up possibilities for additional monetization sinks.

3. They broaden the motivational appeal

- Many of today's casual gamers enjoy social experiences in their games
- Social elements can be used to bring depth and introduce additional motivational drivers to the game.
- With social elements, this motivational “enrichment” can be done without having to touch the core game.

Social features in Casual games - Time Management game Cooking Diary



Cooking Diary - City Locations area

The social hangout area feature has been almost a midcore-only feature, but it now has made its way into the Casual space as well. In November 2021, Time Management game Cooking Diary introduced a new social hangout area to its players called City Locations.

Cooking Diary's meta elements had already previously included decorating the player's avatar with cosmetic items. By introducing City Locations, Cooking Diary added a new social layer in the game by offering players the possibility to present their player avatars to other players. The hangout place is also an excellent way for players to find new friends in the game, increasing player engagement.



Source: GameRefinery SaaS platform

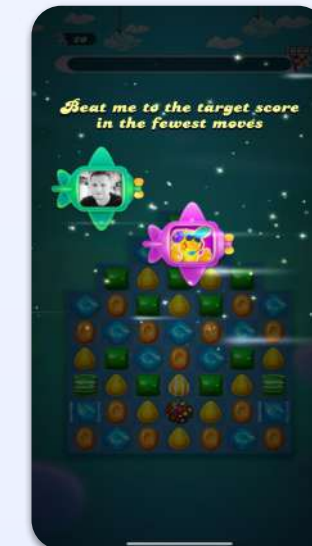
Competitive game features have started trending among Casual games



Royal Match - Lightning Rush



Zen Match - Tournament



Candy Crush Soda Saga - Bear Brawl

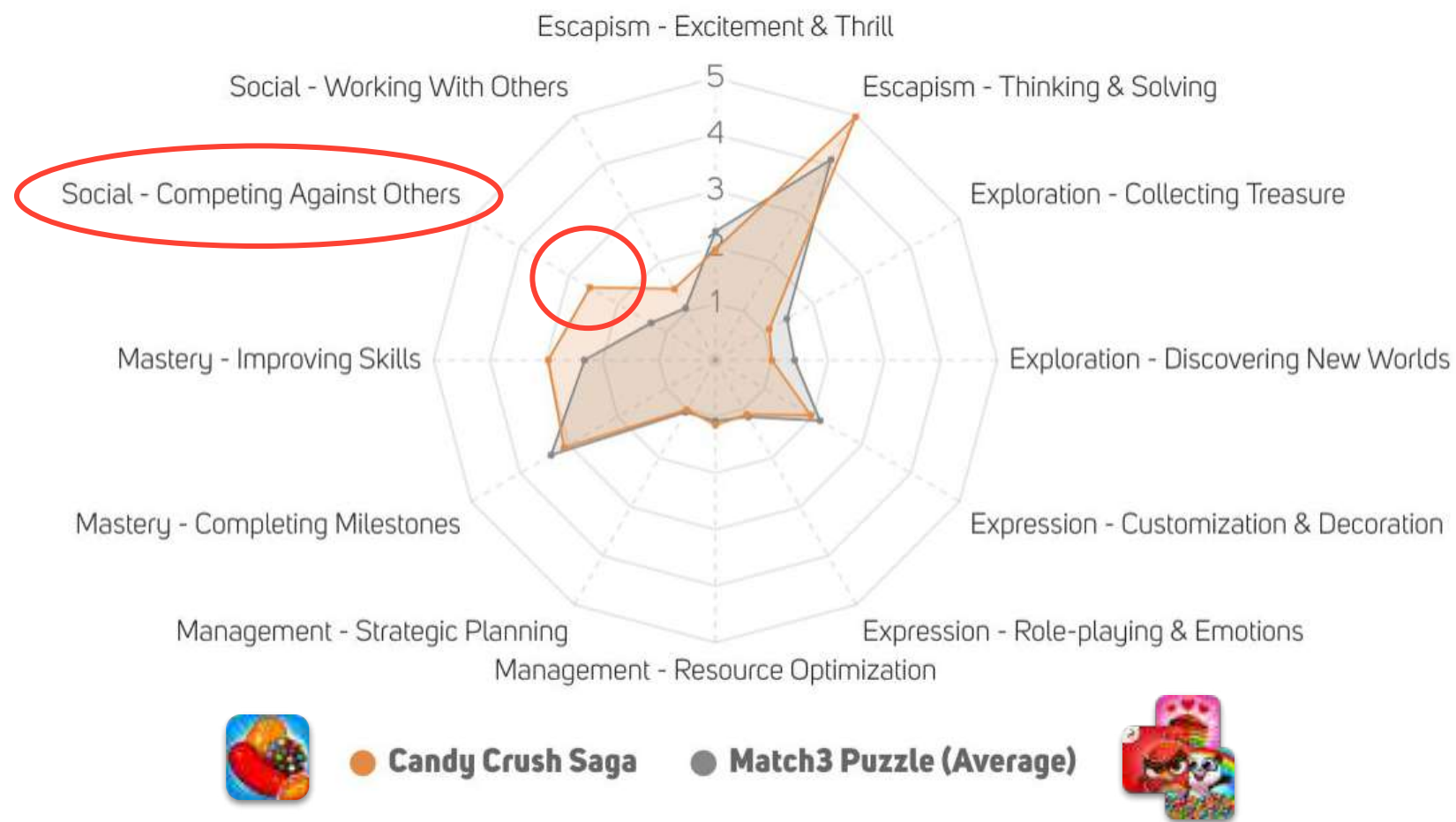


Homescapes - Instant Showdown



Fishdom - Underwater Race

Competitive game features have started trending among Casual games



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Based on our player motivations data, the best performing Match3 titles (for example, *Candy Crush Saga*) have recently started to increase competitive elements in their games, resulting in **a higher appeal to competitive motivated players.**

This is **a clear differentiating factor** between the best performing titles vs. the other games within the Match3 genre, indicating that top games are acting on this new trend.



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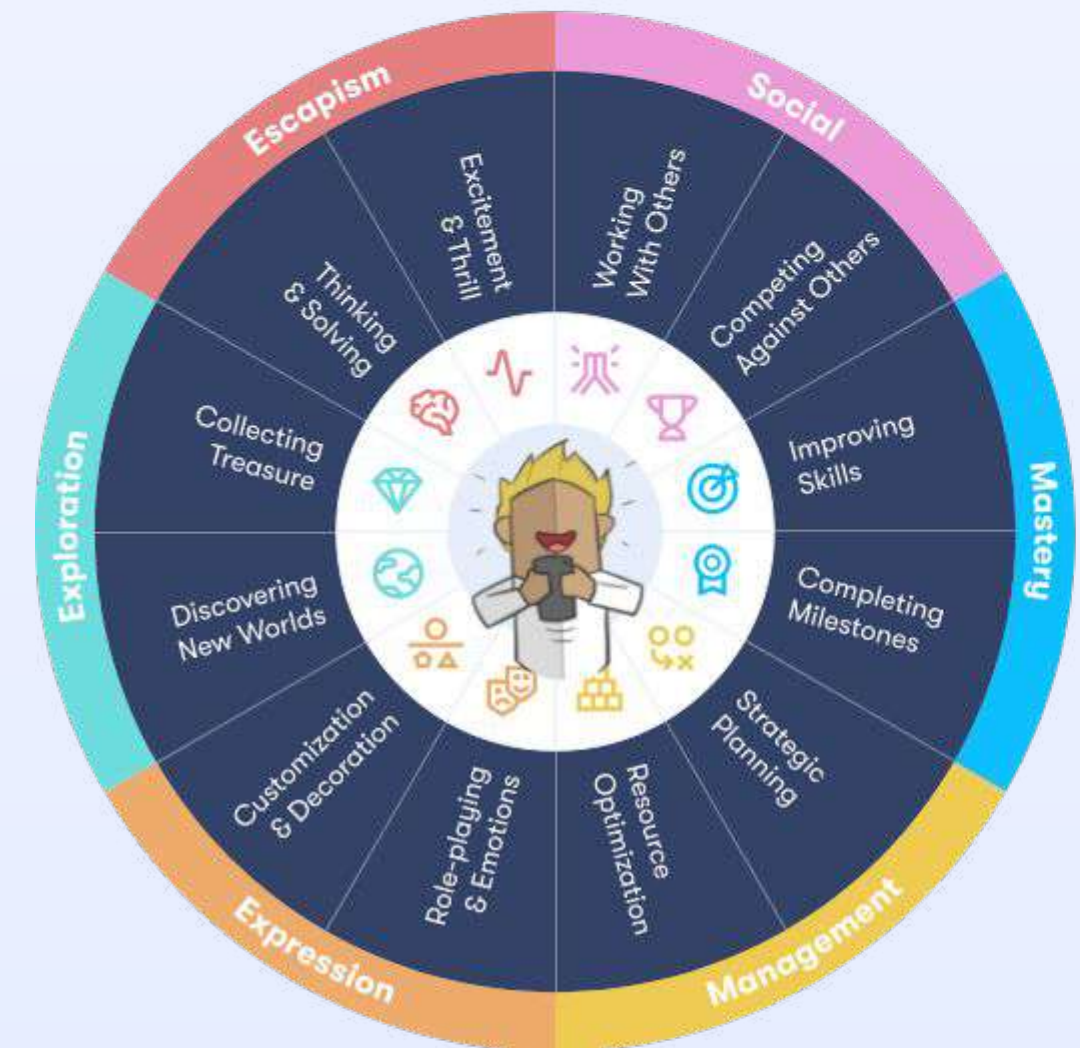
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We Know Mobile Games

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12 Player Motivations



1. Choose Market

US

2. Select optional categories

GENRES

Casual, Mid-core

SUBGENRES

Build & Battle

3. Select optional Filter

Session Length Game Progression

Gacha Tap & Monetization

Live Events Appointment Mechanics

Clash of Clans
Supercell

Build & Battle

FEATURE INDICATORS

Powerscore 82

Skill Thinking

MONTHLY PERFORMANCE

Average Grossing Rank 10

Average Download 195K

REV / DL \$30.1