

2021

Social Casino Gaming Apps Report

MOBILE CASINO IS ON A ROLL



LIFTOFF

GameRefinery
By Vungle



Contents

01

Competitive Landscape

Page 5

02

Acquisition Trends

Page 9

03

App Feature Insights

Page 16

04

Motivation Framework

Page 23

05

Author Takeaways

Page 27

06

Report Notes

Page 29

Introduction

Social distancing measures worldwide paved the way for social casino games to rise in popularity—and revenues. In the U.S., where the pandemic pushed almost 1,000 casinos to close their doors, social casino titles hit the jackpot, according to market research firm Statista. Total global gross gaming revenue (GGR) of the social casino segment amounted to [\\$6.2 billion in 2020](#). It forecasts this figure will increase to \$7.5 billion by 2026.

Top titles in this genre can win big. But winning big spenders is bound to get harder in the next 12 months. The market is seeing more movement—and competition—as traditional gambling and casino companies join the market.

Fortunately, marketing isn't a game of chance. Marketers can harness market data to inform long-term strategies and campaigns to turn every session into an opportunity to drive usage and boost loyalty. They can also experiment with mechanics and features to provide players bonuses that deepen engagement and drive in-app purchases.

That's where this report uniquely provides insights to help social casino companies optimize campaigns and product. Liftoff draws from 83 billion impressions and 12 million installs to deliver ad performance insights alongside GameRefinery, who share unique feature data and metrics to show how marketers can get the most out of their games.

Report Highlights

Revenue

Social Casino apps generated nearly \$1B on iOS in the US alone for the forecast period. Despite the run of success, Social Casino's share of the app gaming market dipped slightly, coming in 1 point less than the previous year.

Cost Metrics

Cost-per-Install (CPI) averaged \$7.21, with the highest price point in November 2020 (\$7.63). At \$5, Android offered the best value, coming in over 2x less than iOS.

Return-on-Ad-Spend (ROAS)

Day 7 and Day 30 ROAS averaged 11.12% and 25.18%, respectively. Platform performance was close: iOS D7 compares favorably to Android, but by D30 Android performs better.

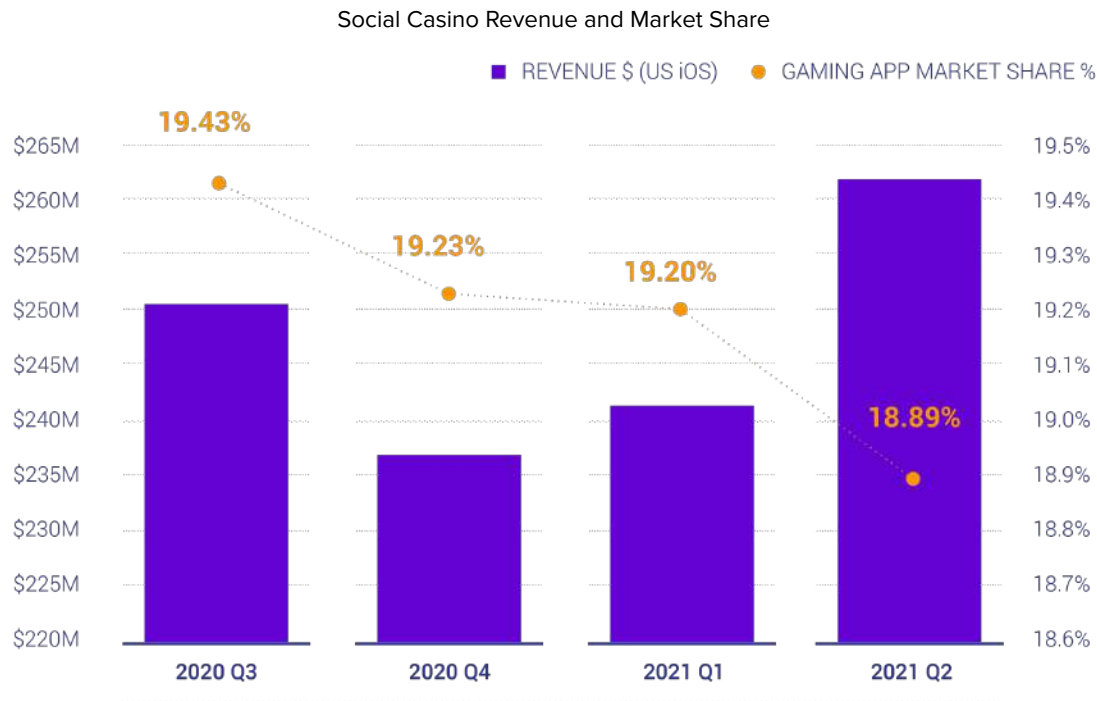
In-App Features

An analysis of the hottest in-game mechanics reveals that Album Collectibles is the most popular feature, utilized by 74 of the top 100 ranking games. Other features with notable impact include Piggy Banks and Battle Passes.

The Competitive Landscape

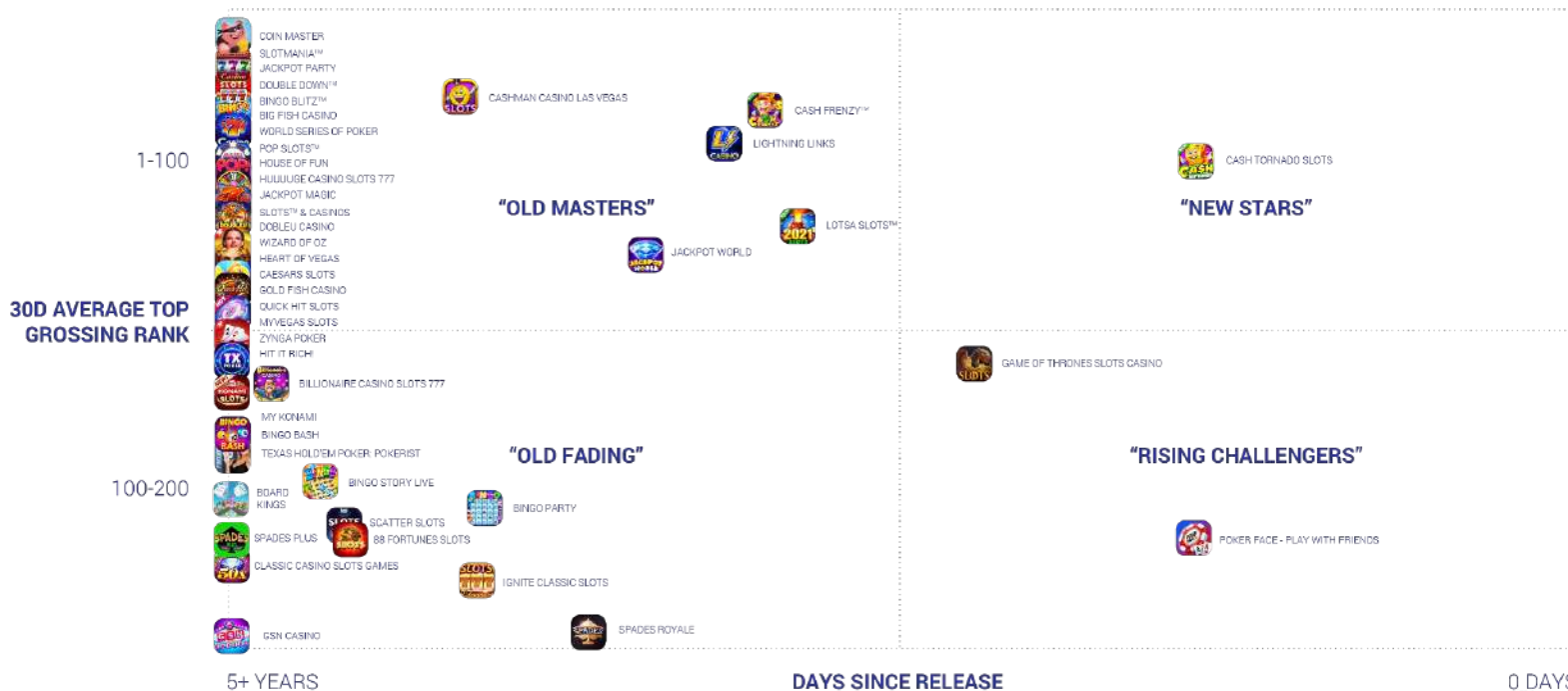
When the chips are down, which apps come out on top?

Social Casino apps raked in revenue throughout 2021, but not enough to lead the pack. Market share in the US dipped even as revenue peaked.



New entrants face difficulty scaling in a saturated market.

Winning Social Casino games that make the big time tend to stay there for a long time. Barrier to entry is tough, no new social casino title has reached the top 200 in the past year.



“

Players are spoilt for choice when it comes to high-quality content and the ability to consume it on high-end devices, which ups their expectations. UA teams need to match user demands by producing top-quality creatives that could tie to a story.

Saikala Sultanova
Senior Director of UA & Growth

product madness
An ARISTOCRAT Company

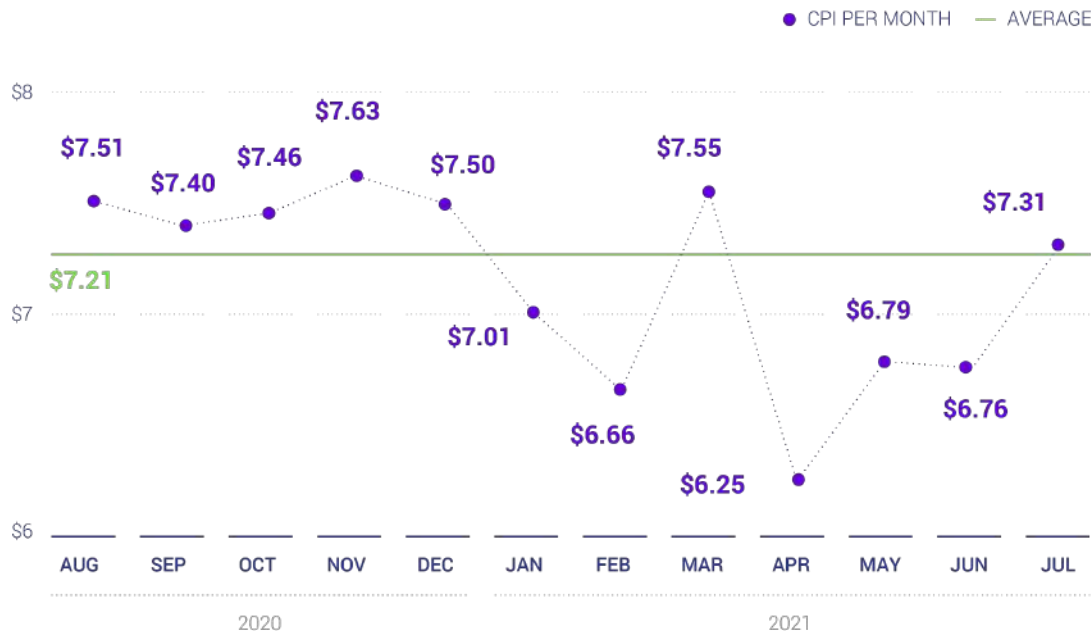


User Acquisition Trends

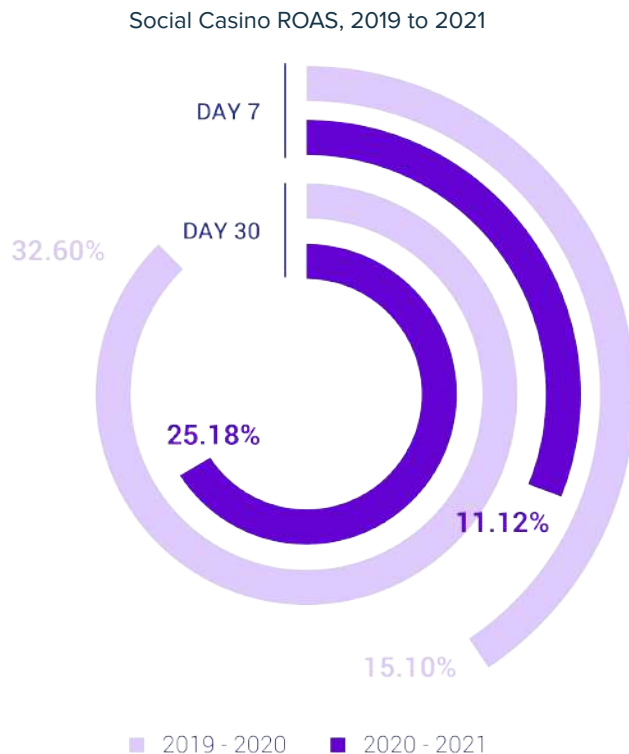
Finding the users that pay out requires more than just luck.

2020 was a costly year for installs, but in 2021 prices fell, on average. In April, CPIs reached a low (\$6.25), but by July the figure returned to above-average levels (\$7.31).

Social Casino CPI, 2020 - 2021



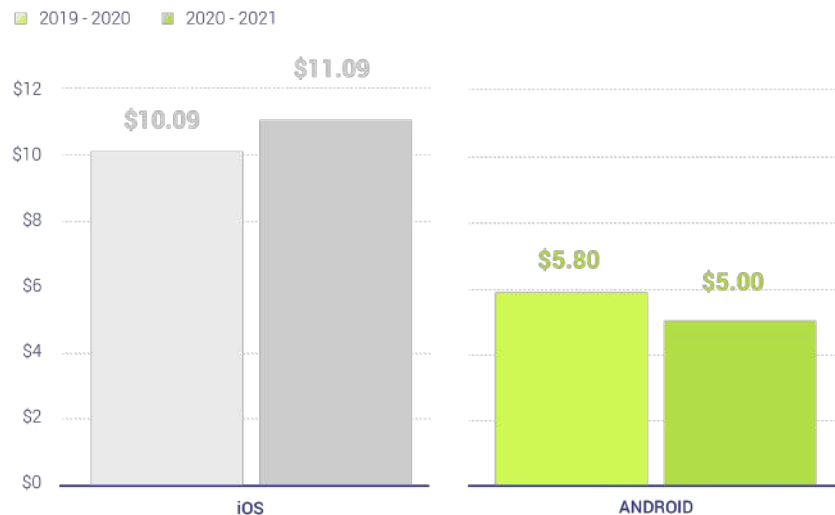
ROAS tests marketers mettle, though it still delivers strong performance with D7 at 11.12% and D30 at 25.18%.



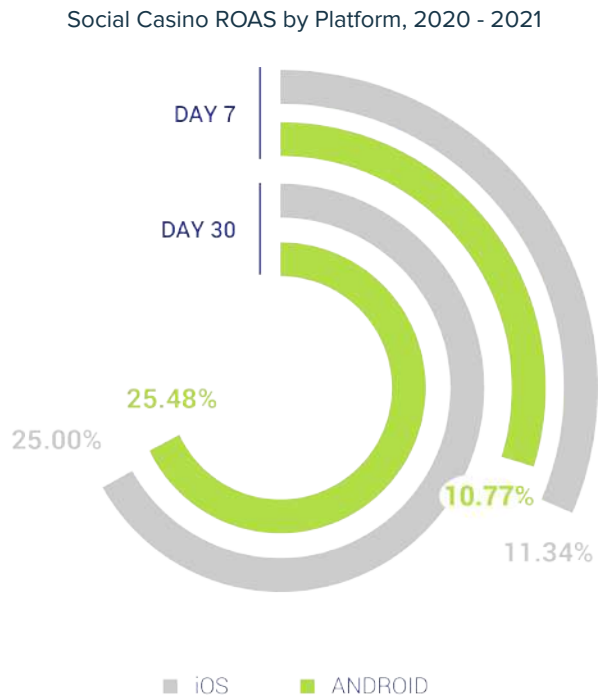
The cost to acquire an iOS user is over 2x more expensive than Android.

- Prices overall have increased and the gap between platforms has widened, with CPIs on iOS 122% higher than Android. In 2020, the gap between the platforms was less at 74%.
- The cost of an install on Android decreased 13.7% to \$5 as marketers took advantage of the difference in price.
- iOS CPIs increased by 9.9% in a year to \$11.09, clearly linked to a shift in ad spend habits as marketers learn to work with Apple's App Tracking Transparency framework (ATT).

Social Casino CPI by Platform, 2020 vs. 2021

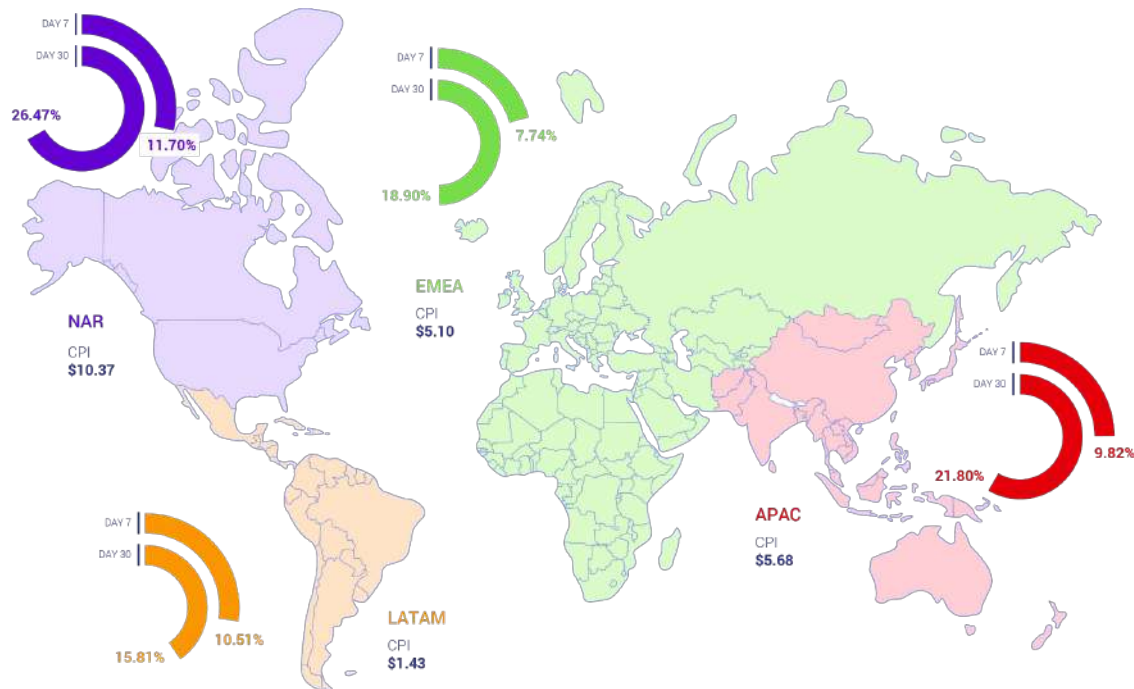


On Day 7, iOS ROAS beat Android by 5.32%. But by Day 30, Android outperforms iOS by 1.9%.



Users are a steal in LATAM, with CPIs averaging \$1.43. But strong ROAS performance in North America suggests better returns for those willing to spend.

Social Casino CPI and ROAS by Region



“

High-quality users usually means a higher price. When you acquire users, do not solely focus on cost. Instead, have more patience during the learning period. More time will give you better results.

Wayne Qin
Co-Founder

Triwin

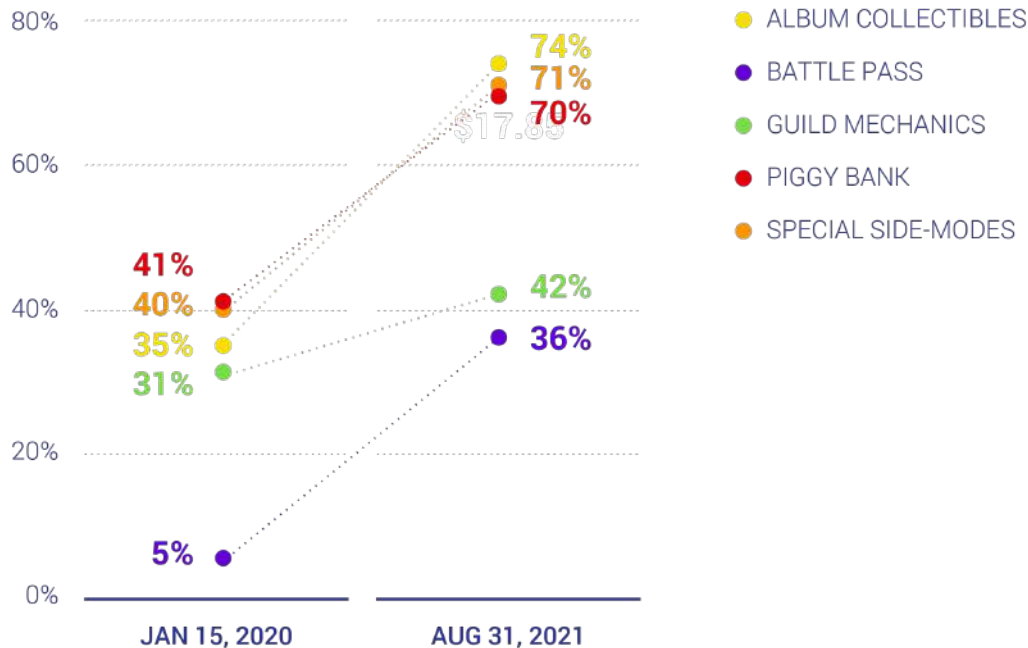


App Feature Insights

App publishers are betting big on rich feature-sets that keep users coming back.

Data reveals the five distinguishing characteristics of winning Social Casino games. These mechanics ring in the revenues for the top 100 titles.

Feature Appearance per Top 100 Social Casino Apps Over Time



Album Collectibles

Album Collectibles is the most popular (appearing in 74% of top apps) and fastest-growing (39 point increase) of all five features. With collectibles, users get additional rewards for completing collections while earning bragging rights for finding rare items. They don't affect the core game experience and are a flexible way of increasing the feeling of progression.



Slotomania – Season Albums



Jackpot Party – All Stars



Cash Frenzy – Around the World



Texas Hold'em Poker: Pokerist

Special Side-Modes

The recent boom of Special Side-Modes and events has changed the nature of slots and bingo games from simple core titles focused on grinding to diverse, meta-driven experiences.



DoubleDown Casino – World Traveler



House of Fun - Adventure Emily



DoubleU Casino – Casino City Challenge



Caesars Slots – Fortune Palace

Special Side-Modes bring an extra level of content to single-dimensional games. Usually, Special Side-Modes are tied to the “main” core gameplay loop through currencies or resources which are acquired by, for example, spinning slots. Players use those resources to advance the Side-Mode.

With the introduction of Special Side-Modes, Social Casino games take a big step towards becoming a much more complex ecosystem of rich narrative and gameplay. More and more games are adding Special Side-Modes, 71 of the top 100—up from 40 in 2020.

Piggy Banks

Piggy Bank systems are effective monetization and engagement tools. Users fill up a piggy bank by playing the game. Once the bank is full, you can purchase its contents with real money at a bargain price.

There is not much variety in the implementation of Piggy Bank systems across Social Casino games. But this simplicity is an advantage. Piggy Banks are also popular, present in 70 of the top 100 games.



Huuuge Casino Slots – Huuuge Vault



Cashman Casino Slots – Piggy Bank



Heart of Vegas Casino Slots – My Piggy Bank



Jackpot World – Kitty Bag

Guild Mechanics

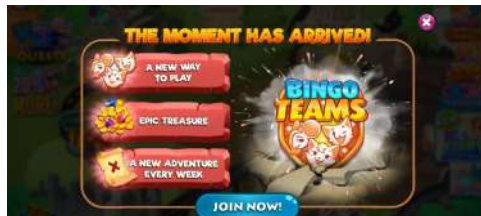
As Social Casino games gear more towards casual players, guild mechanics don't have to be as complex as mid-core titles. Instead, guilds exist to increase social engagement, giving players the chance to play together and chat with others.

Guilds are the foundation of other social features, such as co-op tasks, team competitions, and more. Almost all Casino game guilds give their members the chance to ask for help from one another and chat in a closed setting. These are the “minimum requirements” when introducing guilds to a casino game the first time, featured in 42 of the top 100 games.

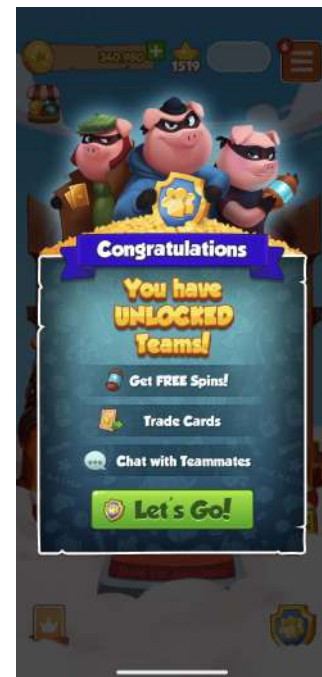
Many top titles have expanded their guild mechanics further. Guild events, communal tasks, competitions, and unique playing modes take advantage of the co-op elements and social aspects that guilds can offer players.



Lotsa Slots - Clans



Bingo Blitz – Bingo Teams



Coin Master – Teams

Battle Pass

Battle Passes increase session-to-session progression while giving players a sense of completion. They aren't present in as many games—36% in total, though this has grown tremendously from 5% of games in 2020.



Cash Tornado Slots – Season Pass



Slotomania – DashMax



Cash Frenzy Casino Slots – Mission Pass



Hit It Rich Casino Slots – Rich Pass

Battle Passes in top casino games tends to look and feel similar: all offer the dazzling opportunity to win extra prizes while playing the game, adding speedy progression for players wanting to increase their stats quickly.

Monetization takes place in two ways:

- **Direct** monetization takes place when you purchase the pass to unlock higher-tier rewards. It resembles a subscription—every season comes with a new pass.
- **Indirect** monetization happens through increased engagement and playtime as users are exposed to other offers.

Revealing the Cards

Utilize GameRefinery's Motivation Framework
to see why players enjoy social casino games.

Why do players enjoy Social Casino games?

GameRefinery tracks and analyzes 12 Motivational Drivers that reveal why.

- The Motivational Drivers define and measure the reasons why players enjoy playing games.
- The framework, built with a survey of over 7,000 people spread across English-speaking countries, uses a model of twelve different Motivational Drivers.
- The Motivational Drivers are grouped based on nature to form pairs or “motivational groups.” For example, Improving Skills and Completing Milestones fall under Mastery.



Social - Working With Others



Social - Competing Against Others



Mastery - Improving Skills



Mastery - Completing Milestones



Management - Strategic Planning



Management - Resource Optimization



Expression - Role-playing & Emotions



Expression - Customization & Decoration



Exploration - Discovering New Worlds



Exploration - Collecting Treasure



Escapism - Thinking & Solving

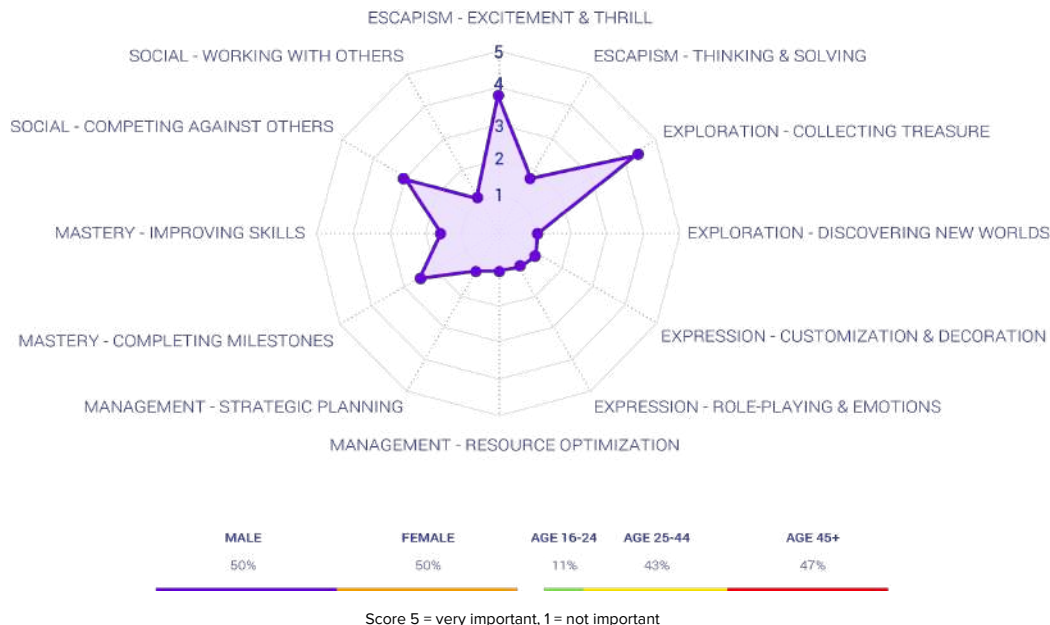


Escapism - Excitement & Thrill

Deconstructing the Player Persona

GameRefinery profiles the most engaged Social Casino users.

- Players love thrilling gameplay and the possibility of collecting treasure.
- Players enjoy competition—especially in card games.
- User demographics are evenly split between men and women.
- Users are older than other genres—nearly half of players are over the age of 45.



“

Machine learning is growing rapidly. It is crucial for marketers to efficiently produce creative assets to maximize automated asset selection through machine learning.

(Basil) Yunong Zhang
CTO & Social Casino Lead

Joyient



Author Takeaways



“

Revenue is up for the social casino genre, but the level of competition and state of app marketing has made it harder for games to pay out. To hit the jackpot, marketers and product teams need to deliver excitement from the ad to the in-app experience.

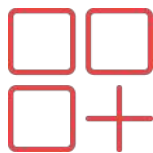
James Haslam
Senior Marketing Insights Manager



Notes on the Report

Liftoff Methodology

Date range: August 1, 2020–August 01, 2021



239

Apps



83 B

Impressions



1.1 B

Clicks



12 M

Installs



WHO IS LIFTOFF?

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.

www.liftoff.io



WHO IS GAMEREFINERY?

GameRefinery by Vungle 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, to understand why games are successful, and how to achieve the same from pre-production to LiveOps.

www.gamerefinery.com

