FOR BUSINESS

THE NEW RULES OF GAMING GROWTH

How players discover their next game. Four checks for turning first play into lasting value.



A Practical Guide for User Acquisition, Growth, and Performance Teams

EXECUTIVE SUMMARY

More spend and more creative are competing for the same players

Reach players your current media mix may be missing. Then measure what happens beyond the first play.

$7B

Tracked gaming digital ad spend in H1 2026 across 41 markets and 18 channels; **+8% YoY**.[1]

1.4T

Tracked gaming ad impressions in H1 2026 across 41 markets and 18 channels; **+14% YoY**.[1]

$40B

Global mobile gaming in-app purchase revenue in H1 2026; **-2% YoY**.[1]

The pressure is visible in the full-year data too. In 2025, AppsFlyer reports gaming **paid-install share rose 10%**, **ad impressions rose 20%**, and the highest-spending advertisers **produced 2,400 to 2,600 creative variations** per quarter.[2]

Takeaway: more activity is competing for the same player attention.

As teams build their 2027 media plans, the question is where each dollar can work hardest.

That starts with knowing the role of each media source: creating qualified discovery, capturing existing intent, or both. The four checks below help identify which investments to protect, test, or scale.

Four checks before you finalize your 2027 media plan

Validate (1) discovery coverage, (2) ad-to-game fit, (3) the player-value signal, and (4) the measurement window before finalizing your 2027 allocation.

Discovery Coverage

Is the next dollar reaching players your current mix is missing?

Ad-to-Game Fit

Does first play match the ad's promise?

Player-Value Signal

Which early action predicts retention or revenue?

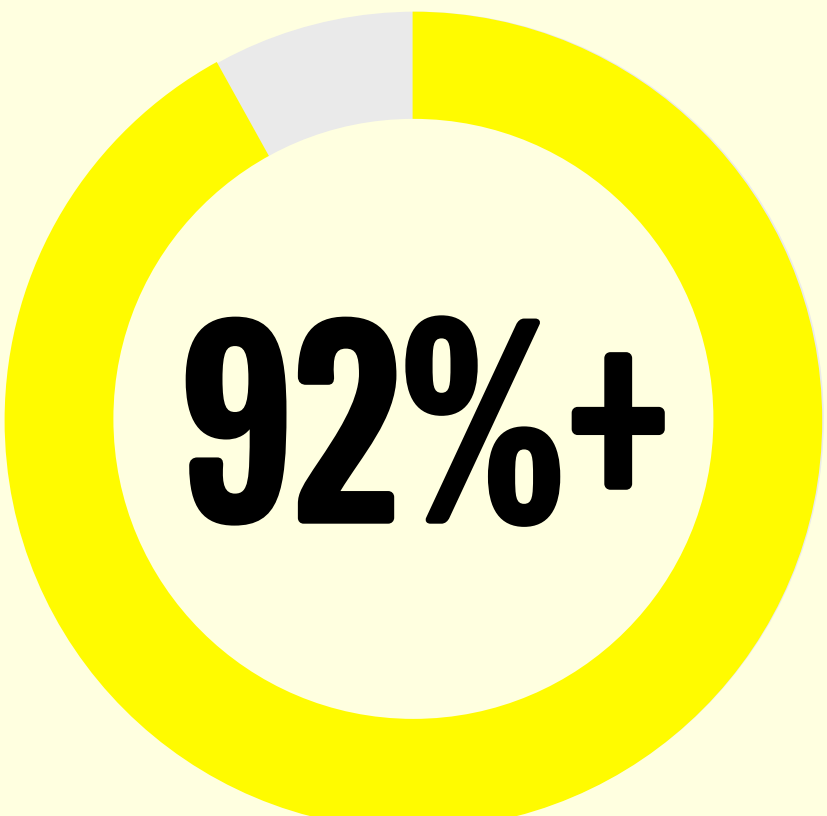
Measurement Window

Has the value you care about had time to appear?

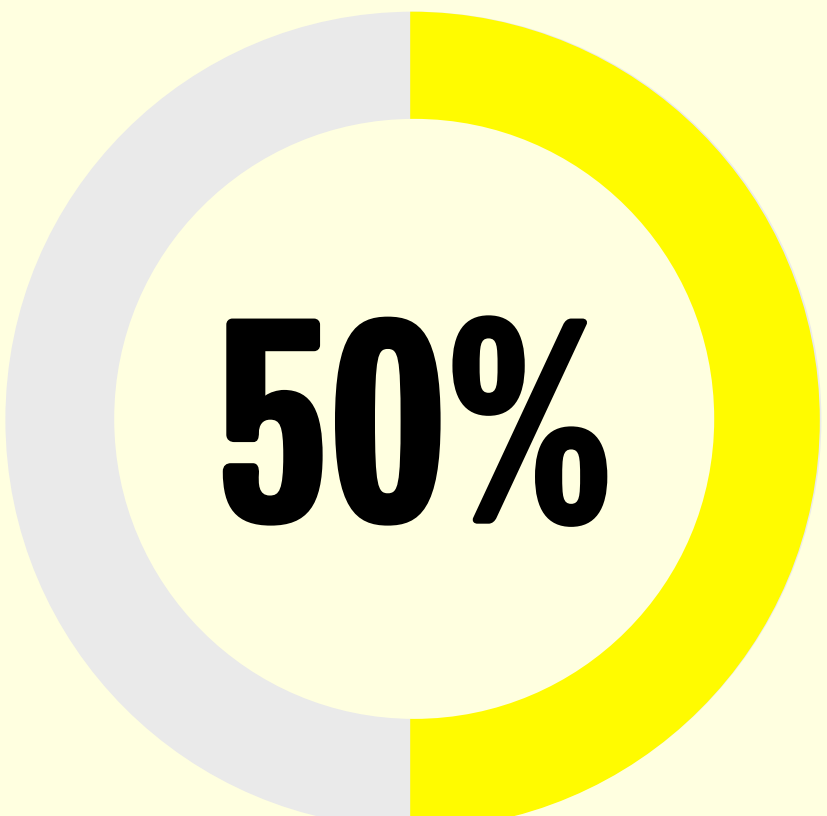
PLAYER OPPORTUNITY

New to your title does not mean new to gaming

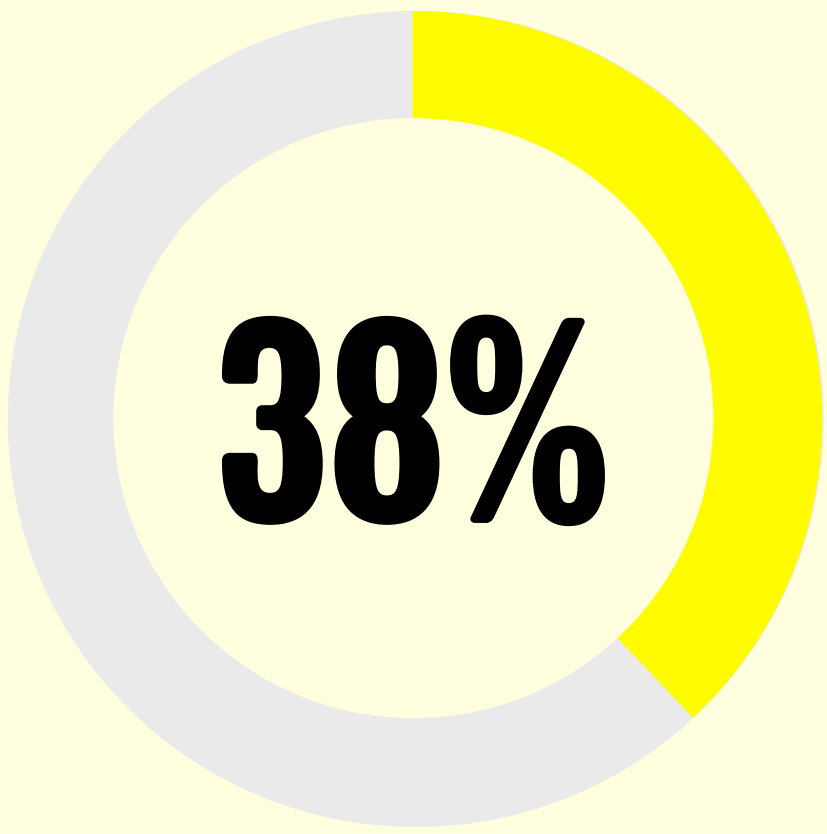
Many of your next players already play several games. The opportunity is to reach them before they decide what to install next.[3,5]



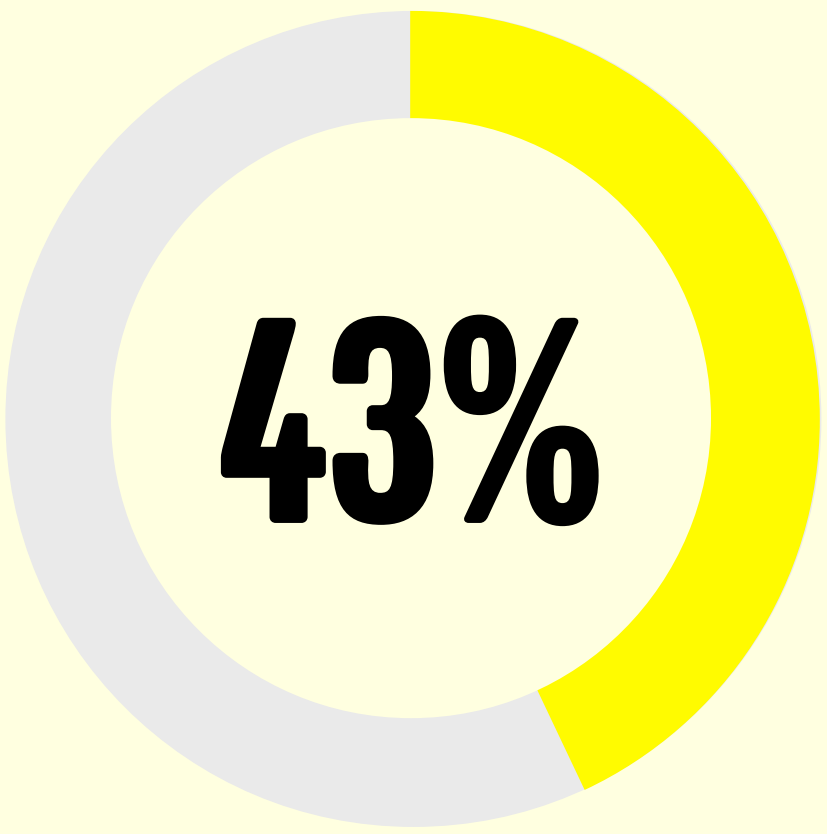
of daily Snapchatters in the US, UK, and Germany reported at least **one measured gaming activity** in the previous month.[5]



of surveyed US daily Snapchatters were **playing four or more casual games.**[3]

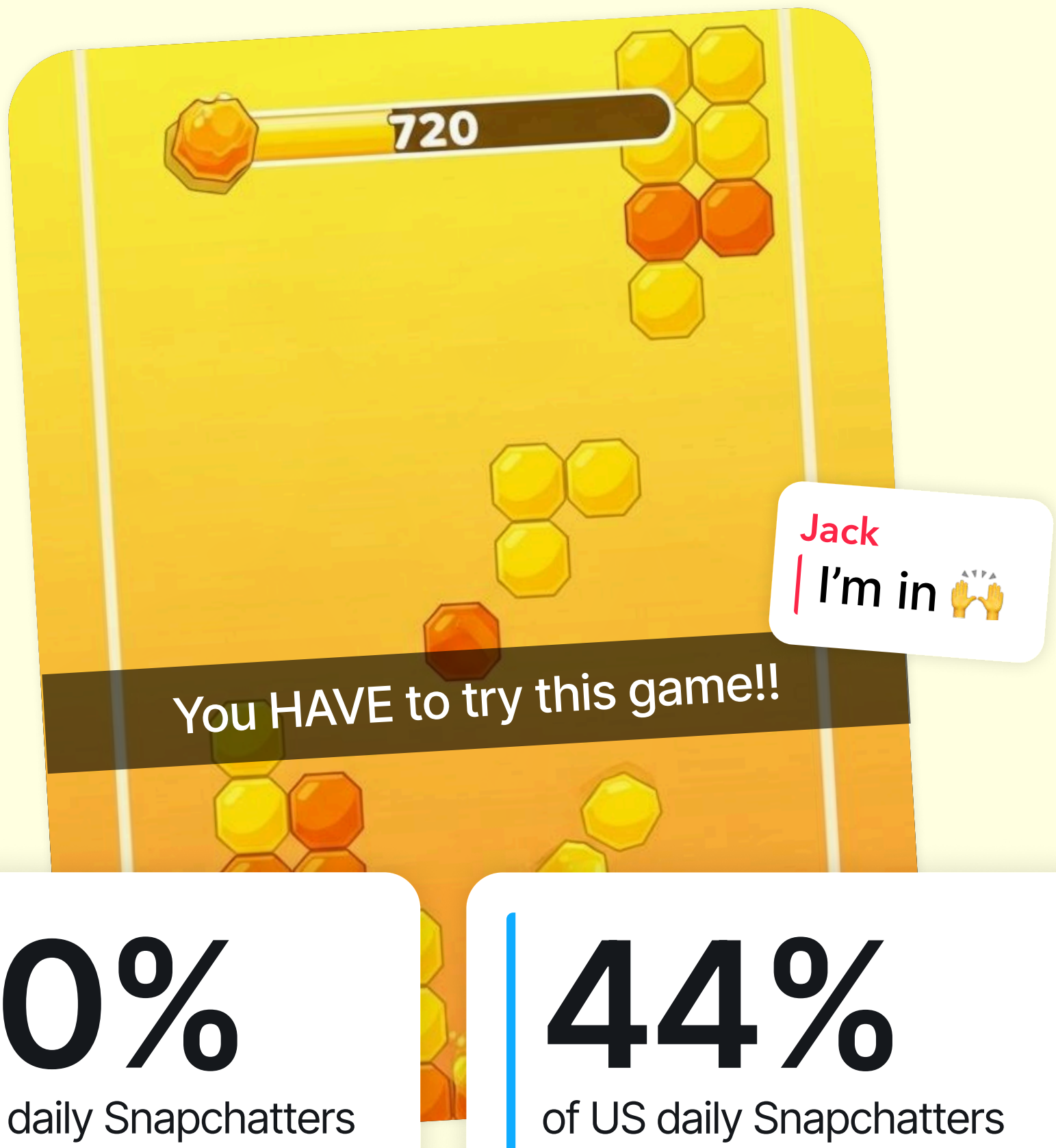


said they **installed new casual games** multiple times a week.[3]



said they **kept a newly downloaded game installed and actively played** it for two months or longer.[3]

Player value can extend through sharing and community



50%
of US daily Snapchatters said they tell others about mobile games they enjoy[3]

44%
of US daily Snapchatters said they often share games with friends or family[3]

For gaming marketers, that makes **referral and sharing signals worth tracking** where the game supports those behaviors.

What this means for to your media plan

The next four sections test whether your plan

1. can reach players your current mix is missing
2. make first play match the ad's promise
3. optimize toward an event that predicts retention or revenue
4. wait long enough for that value to appear

DISCOVERY COVERAGE

Is your next dollar reaching players your current mix is missing?

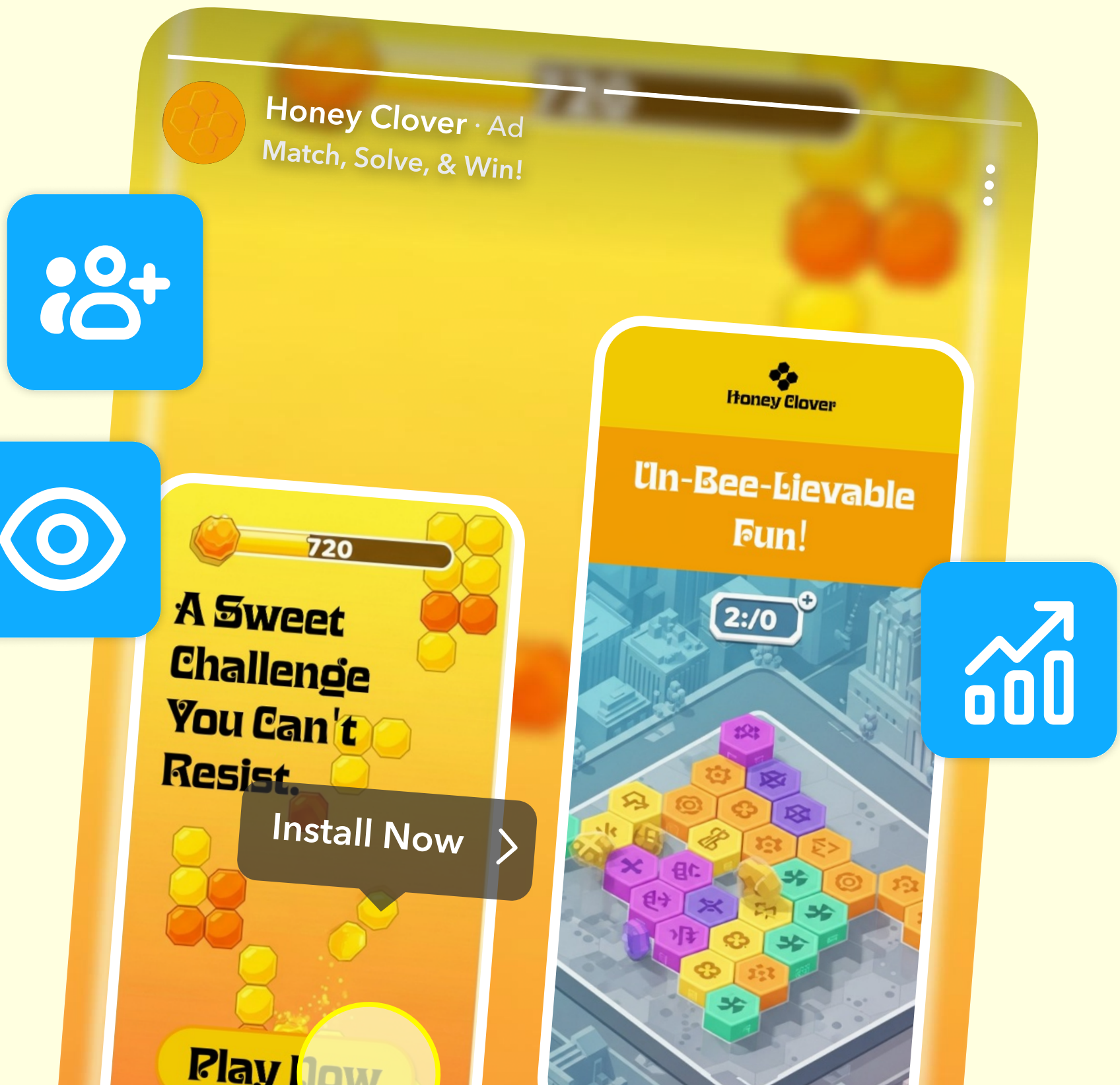
A new media source earns a place in the plan when it adds qualified reach and delivers durable player value.

Budget Risk

More spend, same audience.

Search and retargeting often capture or reactivate existing intent. Social, video, creator, and playable formats can create or deepen discovery before a player has chosen what to install. **Judge each source against the job it is meant to do.**

AppsFlyer found that **iOS media-source diversification increased by as much as 15% YoY** in some gaming segments, while larger iOS advertisers generally operated across more sources.[2]



Where Snapchat may extend daily reach

Among daily Snapchatters who are mobile gamers, the percentage who do not use each platform daily[6]:

Platform	US	UK	France
YOUTUBE	48%	49%	55%
TIKTOK	39%	32%	43%
FACEBOOK	33%	38%	44%
INSTAGRAM	28%	23%	34%

These **audience gaps** identify a **testable reach hypothesis** for Snapchat in the markets shown.[6]

Last-touch may understate Snapchat's role

Singular's Q4 2025 global mobile analysis found that Snapchat averaged a **51% assist rate** and an **84% single-attributed install rate**. In that dataset, Snapchat often appeared either as an assist on installs credited elsewhere or as the only recorded advertising touchpoint in the journey.

These are attribution-path signals, not causal lift results; validate incrementality through a controlled test.[10]

Pressure-test the reach hypothesis

Audience Gap

Score ___ / 3

☐ Can you identify which player audiences your two largest sources may be under-reaching, and whether the gaps are meaningful in your priority market?

Player-Value Rule

Score ___ / 3

☐ Have you defined the retained-player, payer, or revenue outcome a challenger must deliver to earn a larger role in the plan?

Incrementality Design

Score ___ / 3

☐ Can the test isolate incremental outcomes through a holdout, geographic split, or another controlled design?

Read the score

★★★ **3:** Ready to brief a challenger test.

★★☆ **2:** Test narrowly and resolve the missing check before scaling.

★☆☆ **0-1:** Strengthen the audience or measurement case before reallocating budget.

Monday move: fund a challenger test

Find the budget

Choose one established source where additional spend no longer meets your cost or player-value guardrails. Hold it at the last efficient level.

Choose the challenger

Use the dollars planned above that level to fund one under-tested source. If the audience gaps above are relevant to your priority market, test Snapchat as the challenger.

Write the brief

Record the audience, creative hypothesis, primary player-value event, readout date, and scale-or-stop rule.

If every established source remains efficient, fund the challenger from planned incremental budget instead.

AD-TO-GAME FIT

Does first play match the ad’s promise?

Each ad should set an accurate expectation for first play. Judge performance on both acquisition efficiency and post-install quality.

Budget Risk

Cheaper installs, weaker cohorts.

Real gameplay is a strong install cue

89%

of **US** daily Snapchatters surveyed said **real gameplay** would make them more likely to install.[3,4]

85%

of daily Snapchatters surveyed in **France** said **real gameplay** would make them more likely to install.[3,4]



Show the real game, early

82% of **US** daily Snapchatters surveyed said a **preview of the first session** would increase their likelihood to install.[3]

48% of **US** daily Snapchatters surveyed selected **seeing real gameplay in the first two seconds** as a reason not to scroll past.[3]

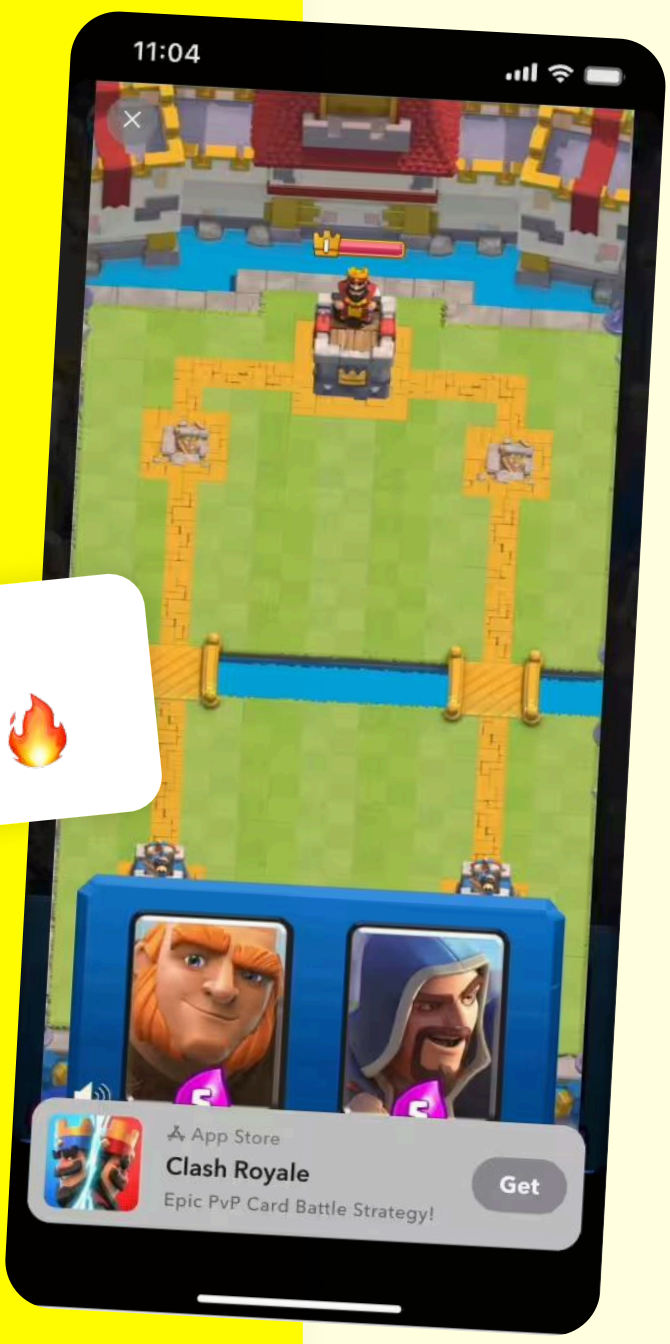
Performance proof: Supercell

In a U.S. A/B test, Snapchat Playable Ads let players trial snippets of **Clash Royale** before installing and delivered

19% HIGHER ROAS

37% LOWER CPI

than Supercell's business-as-usual strategy.[11]



Show the **real mechanic early** and make the **first-session experience clear** in the ad.

Run the ad-to-first-play check

Select one live or proposed ad and score how accurately it represents the player's first session.

Upfront Gameplay

Score ___ / 5

- [ ] Does the ad show recognizable gameplay within the first two seconds?

Clear Mechanic

Score ___ / 5

- [ ] Can the core mechanic be understood from the ad without sound?

First-Session Access

Score ___ / 5

- [ ] Is the advertised mechanic available during the first session?

Ad-To-Game Match

Score ___ / 5

- [ ] Does the first session match the pace, difficulty, and visual style shown in the ad?

Credible Payoff

Score ___ / 5

- [ ] Is the reward, progression, or challenge promised in the ad reachable early enough to feel credible?

Benchmark

★★★★☆ **4-5:** Strong ad-to-game fit

★★★☆☆ **2-3:** Revise the ad or first-session preview

★☆☆☆☆ **0-1:** High risk of ad-to-game mismatch

Monday move: build one gameplay-first challenger ad

Build the challenger ad

Use real first-session footage and show the core mechanic within the first two seconds.

Keep the comparison clean

Hold the audience, bidding approach, market, and budget as consistent as possible with the business-as-usual creative.

Read quality with cost

Evaluate CPI alongside install-to-open rate, first meaningful action, and D1 or D7 retention.

PLAYER-VALUE SIGNAL

Which early action predicts retention or revenue?

Optimize toward the earliest event that reliably predicts retention, revenue, or payback.

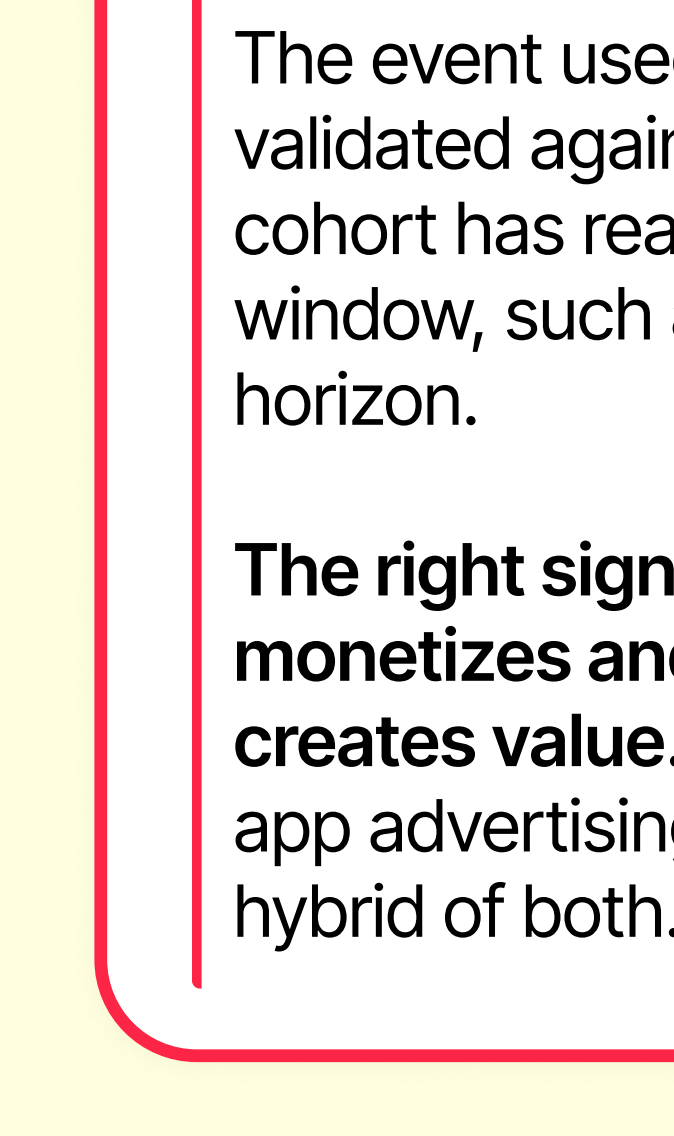
Budget Risk

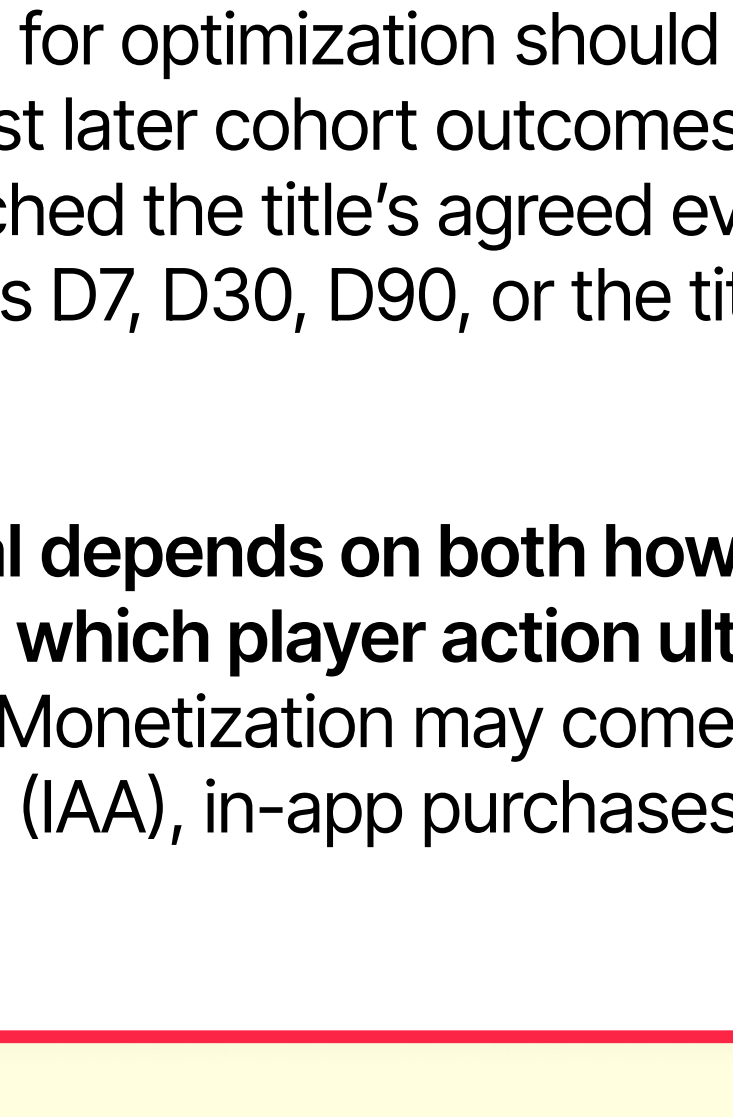
Scaling the wrong event.

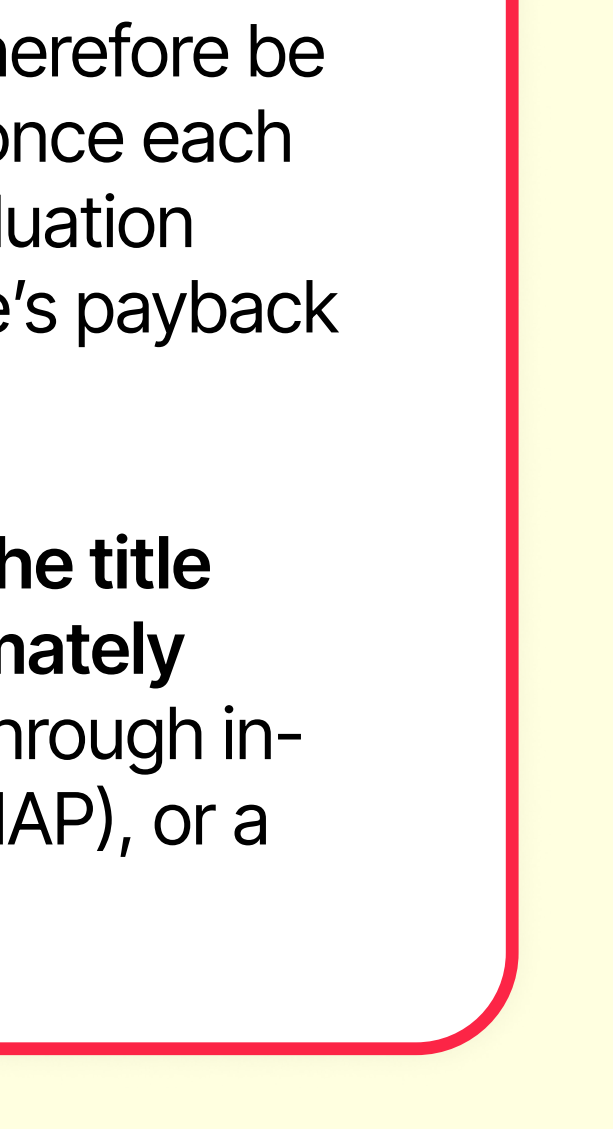
CPI is a useful acquisition-efficiency signal, but its meaning depends on downstream player value. A higher CPI can still be viable when cohort ROAS or payback supports it; a lower CPI can be misleading when acquired players show weak retention or monetization.

The event used for optimization should therefore be validated against later cohort outcomes once each cohort has reached the title's agreed evaluation window, such as D7, D30, D90, or the title's payback horizon.

The right signal depends on both how the title monetizes and which player action ultimately creates value. Monetization may come through in-app advertising (IAA), in-app purchases (IAP), or a hybrid of both.







Tom
One more round!

Match the signal to the path to value

Choose the path that best reflects how your title creates value, then follow it from the early signal to the later outcome. Some titles may fit more than one path.

These signals are illustrative and should be validated against cohorts that have reached the relevant evaluation window.



1 AD-FUNDED / HIGH-VOLUME

- Second session
- First ad-revenue event
- Session depth

- D7 ad revenue per install
- Retained-player value

2 HYBRID-CASUAL

- Core-loop completion
- Progression
- D3 or D7 return

- Blended IAP and IAA revenue
- Cohort ROAS

3

IAP-LED / MIDCORE

- Tutorial completion
- Progression milestone
- Guild or social-feature activation

- D30 payer conversion
- Retained payer value
- Lifetime value

4

PREMIUM / CROSS-PLATFORM

- Wishlist
- Pre-registration
- Account creation
- Linked account

- Purchase
- Activation
- Cross-device play

5

REAL-MONEY / REGULATED

- Eligible registration
- Identity or location verification

- First eligible funded action
- Repeat participation
- Compliant net value

For ad-funded and hybrid mobile games, in-game ad quality can affect retention

For titles that monetize through in-game ads, the ad experience can influence whether players stay. In a global Deloitte and Google AdMob study of mobile gamers, **disruptive ad features pushed one in five surveyed gamers to abandon a game**, while **72% of gamers who encountered high-quality ad experiences continued playing.**[8]

Monday move: compare early signals with later value

Pull the cohorts

Export the last 8–12 acquisition cohorts that have reached the agreed evaluation window, including CPI, the early-event rates under consideration, and the later business outcome that matters.

Compare cost with later value

Compare the cohorts by CPI and by that later outcome. Note when lower-CPI cohorts produce weaker later value or higher-CPI cohorts produce stronger later value.

Find the earliest useful signal

Compare early-event rates across cohorts with stronger and weaker later outcomes. The earliest event that consistently separates them is the strongest candidate for optimization.

Decision rule

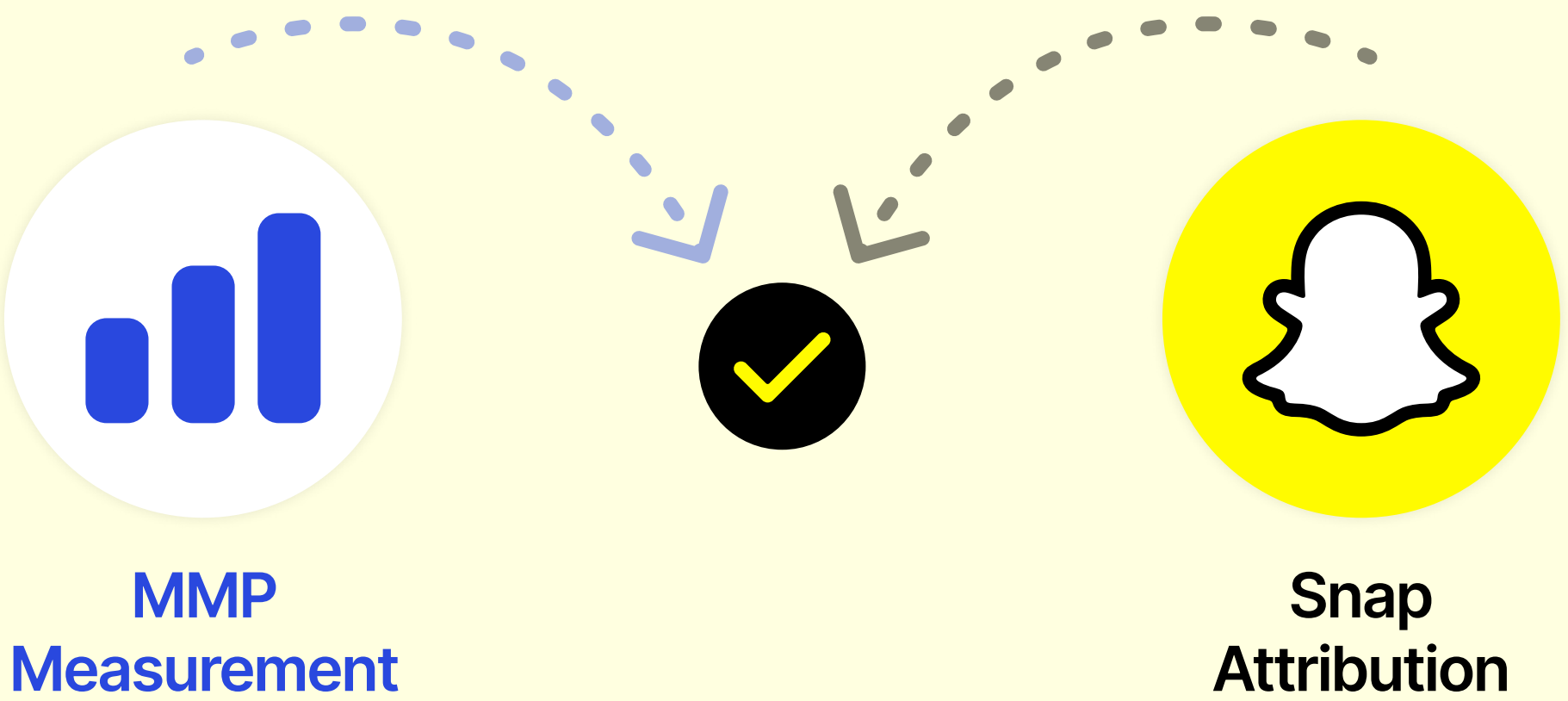
Use an early event for optimization only after past cohort data shows a clear, repeatable relationship with later player value.

Bring the source of truth into the optimization loop

Selecting the right event is only half the job. **The campaign should also learn from the same outcomes your growth team uses to judge performance.**

On Snapchat, Unified Attribution brings together Snapchat platform metrics with cross-channel performance metrics from mobile measurement partners (MMPs), allowing app campaigns to optimize using real-time signals, including MMP conversions. Availability may vary by advertiser, market, and MMP integration.9

Before launch, align on the MMP source of truth, optimization event, attribution window, revenue definition, and expected reporting lag.



MEASUREMENT WINDOW

Has the value you care about had time to appear?

Match the read window to the game's monetization and progression curve.

Budget Risk

Cutting or scaling before value matures.

Across AppsFlyer's measured app dataset:[7]

89%

of Day 60 **IAA revenue** is generated by Day 7.[7]

60%

of Day 60 **IAP revenue** is generated by Day 7.[7]

52%

of Day 60 **subscription revenue** is generated by Day 7.[7]

23%

of Day 60 **Casino IAP revenue** arrives on Day 1, the slowest curve in the dataset.[7]

A single week-one rule can misread different models. In-app advertising (IAA) can often be read earlier; in-app purchase (IAP), subscription, and deeper progression models need more time.

Set the measurement contract before launch

Lock Before Launch	Decision To Record
Business Question	What uncertainty should the test resolve?
Primary Event	Which event defines success?
Guardrails	Which cost, quality, volume, or compliance metrics cannot deteriorate?
Source Of Truth & Signal Alignment	Which mobile measurement partner (MMP), optimization event, attribution window, revenue definition, and reporting lag will guide optimization and the final readout?
Evaluation-Window Requirement	How many cohorts must reach the relevant D7, D30, or D90 window?
Evaluation Date	When will the formal readout happen?
Decision Rule	What result causes the team to scale, revise, or stop?

Decision rule:

Judge the test only after the required number of cohorts has reached the agreed D7, D30, or D90 window.

QUICK REFERENCE TOOL

Is your challenger test ready to fund?

Score the proposed challenger test from 0 to 2 across the four checks. Use the Snapchat audience evidence in this report to define the reach hypothesis. The total shows whether the plan is strong enough to fund a bounded test.

0	1	2
Not Defined	Partial	Test Ready

DISCOVERY COVERAGE

Pts: _____

0	No incremental-reach hypothesis
1	An audience gap is identified, but priority-market relevance or duplication has not been validated
2	The challenger has a defined reach hypothesis in the priority market and a controlled comparison design

AD-TO-GAME FIT

Pts: _____

0	Creative is judged on CTR or CPI only
1	Real gameplay is shown, but first-session fit has not been audited
2	Gameplay-first creative matches first play and is evaluated on post-install quality

PLAYER-VALUE SIGNAL

Pts: _____

0	Installs or CPI drive the decision
1	Post-install metrics exist, but early-event rates have not been compared with later outcomes across past cohorts.
2	The early event shows a consistent relationship with later player value across past cohorts, and optimization aligns to the agreed source of truth.

MEASUREMENT WINDOW

Pts: _____

0	Results are called by campaign age
1	A read date exists, but the evaluation window or guardrails are incomplete
2	The primary event, guardrails, evaluation window, and scale / revise / stop rule are set before launch

Read the score

0-3	**Not Ready to Fund** Close the evidence gaps before reallocating budget.
4-6	**Ready for a Narrow Test** Launch with a bounded scope and resolve the lowest-scoring check before expansion.
7-8	**Ready to Fund a Bounded Test** Proceed with a clear readout and scale / revise / stop rule.

Start with the lowest-scoring check. A high score does not predict performance. It means the test is designed to answer whether the challenger deserves a larger role in the plan. **Use the next page to turn the reach hypothesis into a Snapchat test plan.**

PLANNING WORKSHEET

Build your Snapchat test plan

Start with the lowest-scoring check. Bring one title, one market, and one growth goal. Use this charter to define the audience hypothesis, creative approach, player-value signal, source of truth, and measurement window before launch.

Field	Decision
Title-Specific Growth Objective	Retained players, payers, revenue, or another business outcome: _____
Audience Hypothesis	Market, platform, genre affinity, or cohort Snapchat is expected to add to the current mix: _____
Snapchat's Role	Discovery / intent capture / retargeting / reactivation
Creative Hypothesis	Mechanic, first-play experience, motivation, or reward: _____
Primary Player-Value Signal	_____
Source Of Truth / Signal Setup	Mobile measurement partner (MMP), optimization event, attribution window, revenue definition, reporting lag: _____

Field	Decision
Guardrails	Cost, quality, volume, brand, or compliance: _____
Test Budget And Cells	_____
Evaluation-Window Requirement	D7 / D30 / D90 / other: _____
Evaluation Date	_____
Scale / Revise / Stop Rule	_____

Core investment question

Can Snapchat add valuable players or business outcomes that the current media mix is not producing efficiently?

A useful first test does not need to validate the entire platform. It needs to answer one title-specific growth question with a clear audience hypothesis, creative that reflects first play, a player-value signal, an agreed source of truth, and a fair measurement window.

Refine the plan with Snapchat

Bring the completed worksheet to a Snapchatv growth specialist to refine the audience hypothesis, creative approach, early value signal, source-of-truth setup, measurement window, and scale / revise / stop rule.

Sources, scope, and methodology

1. **Sensor Tower, H1 2026 Gaming Digital Market Index**. Public H1 2026 market update. Advertising figures cover 41 markets and 18 channels; mobile in-app purchase revenue is a worldwide estimate. Used for advertising pressure and revenue context.
2. **AppsFlyer, The State of Gaming for Marketers, 2026.** Based on anonymized, aggregated 2025 data from 9,600 gaming apps, 24.8 billion total installs, and 14.1 billion paid installs. The media-source analysis covers apps using at least three sources and generating at least 3,000 paid installs per quarter. Used for paid pressure, creative output, monetization mix, and media-source diversification.
3. **Suzy, Daily Social Media Users' Engagement with Casual and Match 3 Games - US Report, Q4 2025, commissioned by Snap Inc.** N=584 frequent mobile casual / Match-3 players ages 18-45, including 370 daily Snapchatters. Fielded September 18 to October 1, 2025. Used for game rotation, installation frequency, retention, creative, discovery, and sharing.
4. **Suzy, Daily Social Media Users' Engagement with Casual and Match 3 Games - France Report, Q4 2025, commissioned by Snap Inc.** N=499 frequent mobile casual / Match-3 players ages 18-45, including 316 daily Snapchatters. Fielded September 18 to October 1, 2025 using the same screening criteria and fielding window as the US study, providing a matched European comparison.
5. **GWI, Gaming Insights, US, UK, and Germany, Q2 2024 to Q1 2025, custom research commissioned by Snap Inc.** Daily Snapchat users in each market. Used for the share reporting at least one measured gaming activity in the previous month: US 95%, UK 94%, and Germany 92%. Measured activity sets vary slightly by market.
6. **GWI, Incremental Reach H2 2025, US, UK, and France, Q3 and Q4 2025, custom research commissioned by Snap Inc.** Daily Snapchatters ages 16-64 who use a smartphone or tablet to play games. Samples: US N=2,228; UK N=822; France N=1,255. Used for daily audience non-overlap with YouTube, TikTok, Facebook, and Instagram.

Sources, scope, and methodology

7. **AppsFlyer, The State of App Monetization, 2026.** Covers January 2025 through March 2026 and includes $900 million in verified in-app purchase (IAP) revenue, $800 million in verified subscription revenue, and $7.2 billion in in-app advertising (IAA) revenue. The D7 IAA, IAP, and subscription figures cited are dataset-wide; the Casino IAP figure is gaming-specific.
8. **Deloitte and Google AdMob, Quality Drives Value: A Look into Mobile Gaming Ads, 2025.** Global survey of 7,000 vetted gamers plus a 50-participant diary study. Used for the relationship between disruptive ad features, churn, and high-quality ad experiences.
9. **Snapchat for Business, Announcing Unified Attribution on Snapchat, May 20, 2026.** Describes an app measurement and optimization capability that brings Snapchat platform metrics together with cross-channel performance metrics from mobile measurement partners (MMPs) and supports campaign optimization using real-time signals, including MMP conversions.
10. **Singular, Snapchat's True ROAS: What Multi-Touch Attribution Reveals About Snapchat's Incremental Impact, April 7, 2026.** Analysis of global mobile advertising performance data from Q4 2025. Reported Snapchat metrics included a 51% assist rate, an 84% single-attributed install rate, a 16% co-attributed rate, and 20% higher ROAS under Singular's multi-touch attribution model versus last-touch. The analysis covers global mobile advertising and is not gaming-specific. These are model-based attribution findings, not results from a randomized incrementality study.
11. **Snapchat for Business, Supercell Success Story.** US app-install A/B test comparing Snapchat Playable Ads with Supercell's business-as-usual strategy. Playable Ads delivered 19% higher ROAS and 37% lower CPI. Results are advertiser-specific and represent a comparison of Playable Ads with BAU, not a category-wide comparison of gameplay footage with non-gameplay creative.

How to interpret the evidence

Survey findings describe reported attitudes and behavior; they do not prove causal lift. GWI gaming-activity cuts reflect daily Snapchat users in the U.S., U.K., and Germany; measured activity sets vary slightly by market. GWI reach cuts reflect daily Snapchatters ages 16–64 who use a smartphone or tablet to play games in the U.S., U.K., and France. The Suzy findings are most applicable to frequent mobile casual / Match-3 players ages 18–45 in the U.S. and France. Page-level source notes identify external evidence.

The audits, checklists, signal maps, score thresholds, and worksheets in this report are original planning frameworks; they are not industry averages. Advertiser-specific success-story results illustrate individual campaign outcomes and should not be treated as category benchmarks.