



ESA DIGITAL

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Gaming App Organic ROI Forecast 2027

Mobile and casual games with subscriptions or in-app purchases · US search demand · global AI visibility

Industry report · Prepared by **ESA Digital** · Ahrefs Site Explorer, Keywords Explorer + Brand Radar

[Check interactive report](#)

1. Key findings

FINDINGS

- A Demand is for a game to play now, not for an app.** 26.4M US searches/mo across eight topics, and Puzzle & Word Games alone is 18.1M (68%): "solitaire" (8.8M/mo), "sudoku" (1.8M), "spider solitaire" (723K). Free & Online Games adds 3.9M ("free games", 828K). Searches for the best mobile games are 1% of the set.
- B Guides and tier lists are the engaged-player door.** Game Guides & Tier Lists brings 1.9M searches/mo ("tier list", 141K; "genshin tier list", 27K) and codes and rewards another 456K ("coin master free spins", 70K). These are players already inside a game, looking for an edge.
- C Big games have small organic footprints.** Supercell draws 2.6M visits/mo and Genshin Impact 1.8M, each on under 12K keywords and mostly outside the US. Pokemon GO, Candy Crush (king.com) and Zynga sit under 210K visits: their players arrive from the stores, not from search.
- D AI answers are dominated by one franchise.** Genshin Impact holds 61.2% of the set's 35.0M AI impressions/mo, Pokemon GO 17.4% and Supercell 13.6%. Broad questions like "What games can I play for free?" are answered from fortnite.com, ea.com and innersloth.com, not from the publishers in this set.
- E Only the best-monetising games pay back on organic.** A median subscription game earns \$11 a year per payer and converts 1% of installs. On a top-10% funnel (4.8% install → paid, \$40 per payer) a Growth project returns \$357K on \$263K over 24 months (ROI 36%, break-even in month 20); the median returns \$9K.

WHAT TO DO

Put a playable or useful page in front of the search: browser demos, daily puzzles, tier lists, guides and code pages for your own game, each one ending in the install. Then monetise the installs: in this category the payer rate and value per payer, not traffic, decide whether organic pays.

2. SEO Opportunities

RELEVANT CONTENT IDEAS

3 331

TOPICAL CLUSTERS

8

MONTHLY SEARCH VOLUME

26 432 600

CLUSTER	VOLUME SHARE	IDEAS	VOL/MO
Puzzle & Word Games ↗	67.5%	467	18 132 000
Free & Online Games ↗	14.7%	424	3 947 400
Game Guides & Tier Lists ↗	7.1%	491	1 911 800
Kids & Family Games ↗	4.2%	419	1 129 100
Codes, Rewards & Free Items ↗	1.7%	343	456 350
Multiplayer & Games with Friends ↗	1.3%	385	350 950
Best Mobile Games ↗	1.0%	423	255 950
Strategy, RPG & Gacha ↗	0.9%	379	249 050
Relevant total	98.5%	3 331	26 432 600
<i>Off-topic / adjacent — excluded</i>	<i>1.5%</i>	<i>252</i>	<i>412 400</i>
Total		3 583	26 845 000

How this was built >

FINDINGS

Puzzle & Word Games (67.5%) and Free & Online Games (14.7%) hold over four fifths of relevant US demand, almost all of it “play now” intent (“solitaire”, “sudoku”, “free games”). Guides & Tier Lists (7.1%) and Codes & Rewards (1.7%) are smaller but come from active players. Best-mobile-games, multiplayer and RPG searches are about 1% each.

WHAT TO DO

If your game is a puzzle, word or casual title, build browser-playable versions and daily challenges for the head terms and offer the app for progress and streaks. For mid-core games, own your guides, tier lists and code pages instead of leaving them to fan wikis.

3. Competitive Landscape

3.1 Organic SEO — Ahrefs Site Explorer

BRAND	ORG. TRAFFIC/MO ↓	ORG. KEYWORDS	TOP 3	BACKLINKS	ORG. VALUE	DR
Supercell ↗ supercell.com	2 572 754	11 722	6 299	132 321 478	\$683K	82
Genshin Impact ↗ genshin.hoyoverse.com	1 758 798	11 892	6 275	1 418 278	\$1.2M	80
Candy Crush ↗ king.com	207 916	5 451	1 868	1 024 883	\$38K	77
Pokemon GO ↗ pokemongolive.com	115 415	9 754	3 658	1 138 025	\$21K	79
Zynga ↗ zynga.com	56 062	1 909	826	683 924	\$56K	78

Click column header → sort. Click brand row → SEO dashboard. Bars are normalized per column.

3.2 AI Visibility — Brand Radar (impressions/month)

BRAND	CHATGPT	AI OVERVIEWS	AI MODE	TOTAL ↓
Genshin Impact ↗ genshin.hoyoverse.com	8 253 277	8 510 661	4 620 019	21 383 957
Pokemon GO ↗ pokemongolive.com	2 507 066	2 186 474	1 371 152	6 064 692
Supercell ↗ supercell.com	1 743 225	1 887 615	1 107 219	4 738 059
Candy Crush ↗ king.com	761 299	1 013 708	762 494	2 537 501
Zynga ↗ zynga.com	119 807	58 739	48 647	227 193

Click column header → sort. Click row → ChatGPT citation prompts. Brand Radar matches **brand names**, not domains.

3.3 AI Share of Voice

Genshin Impact 61.2% — the 5 brands in this set hold **34 951 402** AI impressions/mo across ChatGPT, AI Overviews & AI Mode.



FINDINGS

The five brands hold 35.0M AI impressions/mo across ChatGPT, AI Overviews and AI Mode. Genshin Impact leads with 61.2%, then Pokemon GO (17.4%) and Supercell (13.6%); Candy Crush has 7.3% and Zynga under 1%. Cited ChatGPT prompts are mostly fan questions about the games themselves (characters, events, "Is Clash Royale safe for my child?"). Roblox is not in the set: with 111M organic visits/mo it would flatten every other bar.

WHAT TO DO

Publish the facts AI engines need to recommend a game: is it free, what it costs, age rating and safety, and how it compares with its closest rivals. Parents' safety questions and "is it free" questions are cited often and are easy to own on your own domain.

4. ROI Forecast

INDUSTRY BENCHMARK

Weak

Typical

Strong

×

PACKAGE

Start

Growth

Scale

×

PERIOD

12m

24m

36m

Forecast outcomes

BREAK-EVEN

Month 20

24M REVENUE

\$357K

24M ROI

36%

24M PROFIT

\$94K

Investment

PROJECT COST

\$263K

PUBLISHED PAGES

600

Parameters

PACKAGE INPUTS

Pages / month 25

Monthly cost \$11K

CONVERSION FUNNEL · STRONG TIER

Visit → Install 6.6%

Install → Paid 4.8%

Revenue / payer / yr \$40

CONTENT PERFORMANCE

Months to peak 7

Avg visits/page 180

Success rate 60%

AI / GEO LIFT

LLM ratio 0.1x

LLM conv boost 2x

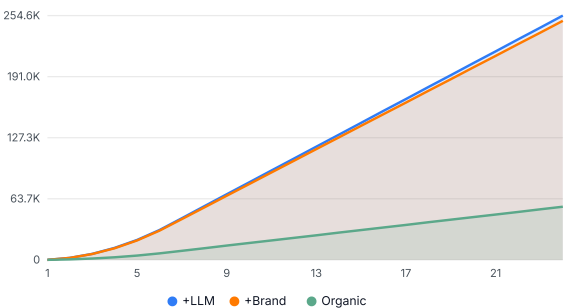
[Dive deeper — change parameters in the ROI calculator ↗](#)

– Open the interactive model to adjust assumptions yourself.

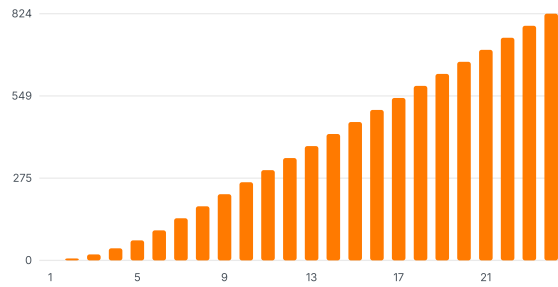
Cumulative Revenue vs Cost



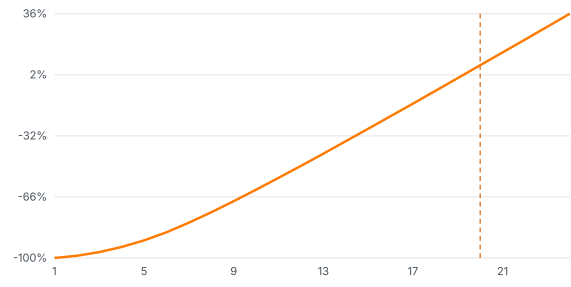
Traffic Growth



New Paid Customers



Cumulative ROI



MONTHS	PAGES	ORGANIC	BRAND	LLM	INSTALLS	PAYERS	REVENUE	ROI
1	25	0	0	0	0	0.0	\$0	-100%
2	50	450	1.6K	45	140	6.7	\$268	-99%
3	75	1.4K	4.7K	135	419	20	\$804	-97%
4	100	2.7K	9.4K	270	838	40	\$2K	-94%
5	125	4.5K	15.8K	450	1.4K	67	\$3K	-90%
6	150	6.8K	23.6K	675	2.1K	101	\$4K	-86%
7	175	9.4K	33.1K	945	2.9K	141	\$6K	-80%
8	200	12.2K	42.5K	1.2K	3.8K	181	\$7K	-75%
9	225	14.8K	52.0K	1.5K	4.6K	221	\$9K	-68%
10	250	17.6K	61.4K	1.8K	5.4K	261	\$10K	-62%
11	275	20.3K	70.9K	2.0K	6.3K	302	\$12K	-55%
12	300	22.9K	80.3K	2.3K	7.1K	342	\$14K	-49%
13	325	25.6K	89.8K	2.6K	8.0K	382	\$15K	-42%
14	350	28.4K	99.2K	2.8K	8.8K	422	\$17K	-35%
15	375	31.1K	108.7K	3.1K	9.6K	462	\$18K	-28%
16	400	33.8K	118.1K	3.4K	10.5K	503	\$20K	-21%
17	425	36.5K	127.6K	3.6K	11.3K	543	\$22K	-14%
18	450	39.1K	137.0K	3.9K	12.1K	583	\$23K	-7%
19	475	41.9K	146.5K	4.2K	13.0K	623	\$25K	0%
20	500	44.5K	155.9K	4.5K	13.8K	663	\$27K	7%
21	525	47.3K	165.4K	4.7K	14.7K	704	\$28K	14%
22	550	50.0K	174.8K	5.0K	15.5K	744	\$30K	21%
23	575	52.6K	184.3K	5.3K	16.3K	784	\$31K	29%
24	600	55.4K	193.7K	5.5K	17.2K	824	\$33K	36%

ESA ROI Calculator · Start 10/\$5.5K · Growth 25/\$10.95K · Scale 40/\$15.5K · peak 7 mo, success 60%, 180 visits/page, brand ×3.5, LLM 0.1×, LLM conv ×2. Funnel inputs follow the industry benchmark switch (Weak / Typical / Strong = bottom quartile / median / top 10% of the category). Revenue per payer is 12-month revenue for games with subscriptions; in-app purchase and ad revenue are not modelled. Strong = top 10% of subscription games on each metric; visit → install is an estimate (no open benchmark for search visitors).

FINDINGS

On the Growth package over 24 months, a top-10% funnel for subscription games (Strong tier: 6.6% visit → install, 4.8% install → paid, \$40 per payer) turns a **\$263K** project into **\$357K** of revenue (ROI 36%) and breaks even in month 20. At the top quartile (2.3% and \$24 per payer) no package pays back, and the median (Typical tier) returns only **\$9K**. Organic pays in gaming only for titles that already monetise like the best 10%.

WHAT TO DO

Check your own install → paid rate and revenue per payer before investing. If you earn from in-app purchases rather than subscriptions, model your own payer value: the benchmark covers subscription games, and open quartiles for in-app purchase games are not published.

Sources & Benchmarks

I. Sources

- **Content** — [Ahrefs Keywords Explorer](#) (US volumes) + [ESA](#) intent clustering
- **Organic SEO** — [Ahrefs Site Explorer](#)
- **AI Visibility** — [Ahrefs Brand Radar](#) (ChatGPT / AI Overviews / AI Mode; citations API limit 25)
- **ROI** — [ESA ROI Calculator](#) + service packages
- **Industry benchmarks** — [RevenueCat](#), [State of Subscription Apps 2026](#), [Unbounce](#), [Conversion Benchmark Report 2024](#), [Unity, 2024 Mobile Growth and Monetization Report](#), [GameAnalytics](#), [2026 Mobile & PC Gaming Benchmarks](#)

II. Benchmarks

Reference ranges for a subscription-app funnel — Visit → Install → Trial → Paid — for the median app in the category and its bottom quartile and top 10%. Rows marked **ROI-model input** feed the forecast above. All figures are modelled estimates on the stated inputs, not guarantees.

II.A. Conversion — industry benchmarks

FUNNEL STEP	WEAK → TYPICAL → STRONG	SOURCE / NOTE
Visit → Install	Weak 1% Typical 3% Strong 6.6%	Estimate; strong = landing-page benchmark (Unbounce 2024)
Made a purchase (lifetime, Unity games)	Weak — Typical 1.8% Strong —	Unity 2024: games with >\$10K revenue, 2023 installs
Install → Paid (35 days, subscription games)	Weak 0.3% Typical 1.0% Strong 4.8%	ROI-model input. RevenueCat 2026
Day-1 retention	Weak 13.4% Typical ~22% Strong ~30%	GameAnalytics 2026
Day-30 retention	Weak <0.5% Typical 0.7-1.0% Strong ~1.8%	GameAnalytics 2026
Revenue per payer (12 months)	Weak \$6 Typical \$11 Strong \$40	ROI-model input. RevenueCat 2026
Avg. visits per page (peak)	180 visits	ROI-model input. Ahrefs top pages of the five leaders (US, pages with 10–3,000 visits/mo, top 100 per domain, n=418) have a median of only ~70 visits/page: game publishers get little from search today. The model keeps 180 , the figure used across the app reports, which assumes pages built for the search demand above rather than publisher news pages.
Revenue per payer (12 months)	\$40	ROI-model input. RevenueCat, State of Subscription Apps 2026: 12-month revenue per payer for games with subscriptions (bottom quartile / median / top 10%).

II.B. GEO benchmark ranges

GEO METRIC	EARLY	HEALTHY	AI-HEAVY	NOTES
LLM traffic ratio	0.01–0.04×	0.05–0.12×	0.15–0.30×	LLM referrals as a multiple of organic
LLM conversion boost	+50–120%	+300–500%	+400–700%	ChatGPT highest; AI Overviews lowest
Content success rate	30–50%	45–65%	50–70%	Service pages and how-to content rank best
Months to peak	3–6	6–14	14–24	Per published cohort
Brand traffic multiplier	0.05–0.15×	0.20–0.40×	0.45–0.90×	Fixed at 3.5× brand-lift in the model