



HYPER-CASUAL BENCHMARK REPORT 2021



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INTRODUCTION

To succeed in 2021, marketers will need to continue making data-driven decisions.

The goal of this report is to provide you with key insights. This hyper-casual benchmark report consists of data collected by Tenjin for all of 2020. We consider the effects of COVID-19 on the mobile ecosystem, Apple's announcement during the WWDC last year about the deprecation of IDFA, and new attribution modeling. We provide platform insights, CPI for Top 10 countries and ad networks, as well as the Top 10 ad networks per ad spend and ad revenue.

EXECUTIVE SUMMARY



Applovin

#1 Ad network by ad spend on iOS and Android



US

#1 Country by ad revenue on iOS and Android



Mexico

\$0.16 Lowest CPI on iOS amongst countries



India

\$0.02 Lowest CPI on Android amongst countries



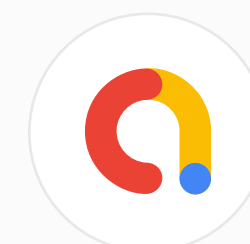
Mintegral

\$0.15 Lowest CPI for ad networks by ad spend on iOS



ironSource

\$0.08 Lowest CPI for ad networks by ad spend on Android



Google AdMob

#1 Ad network by ad revenue on iOS and Android



ABOUT TENJIN

Tools & Training for app developers who want to leverage user acquisition and monetization data



Free attribution



Ad Revenue LTV



Cost and ad aggregation



Automation APIs



Internal BI on demand



iOS 14 proof-attribution

METHODOLOGY

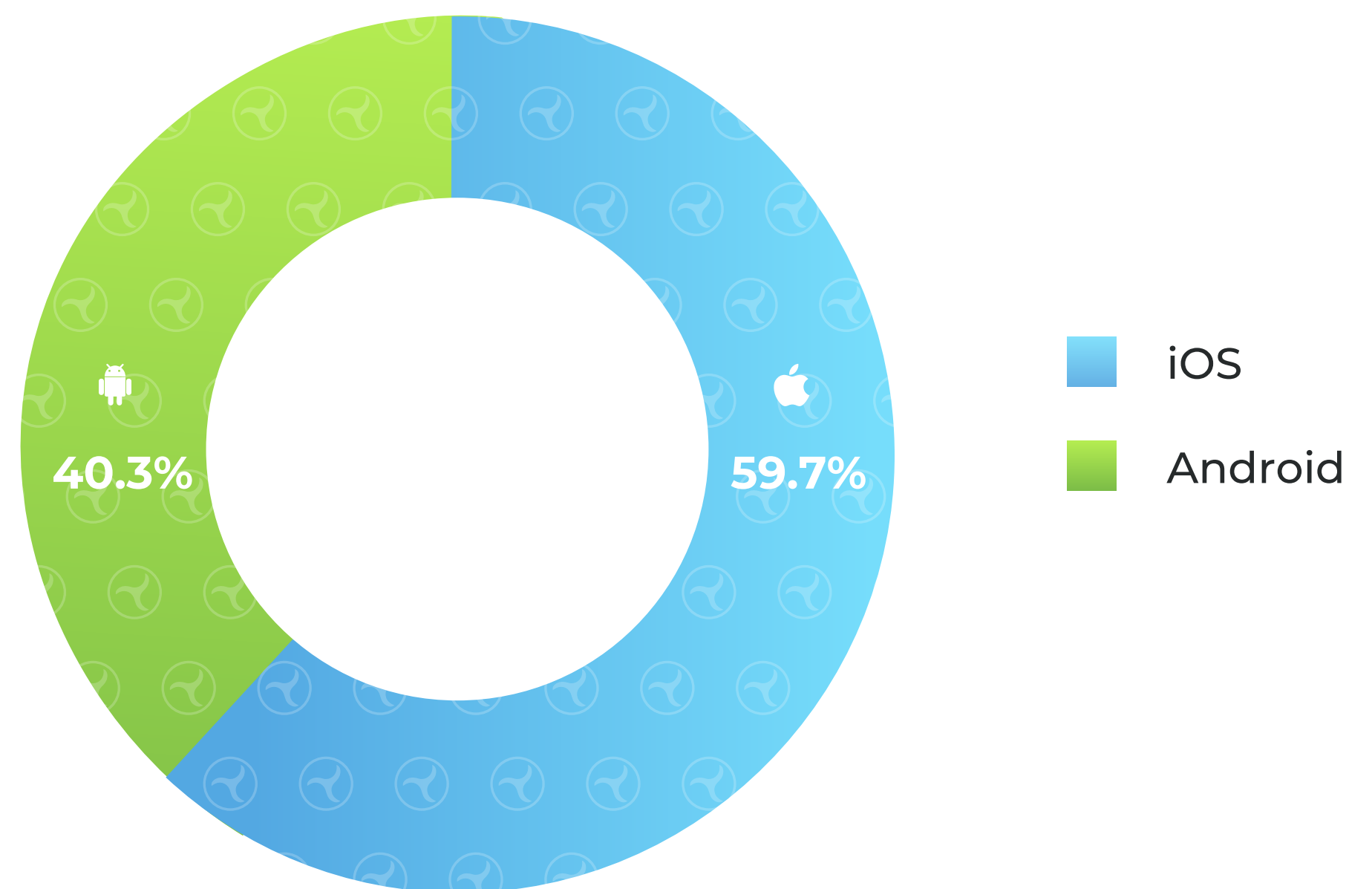
- ④ This benchmark report consists of anonymised data collected by Tenjin for hyper-casual games in 2020 (January 1 2020 - December 31 2020).
- ④ The CPI ad network reports are compiled from the ad networks in the top 10 ad networks by ad spend.
- ④ Only countries that surpass the thresholds of \$1 million of ad spend are included in the CPI report by country.

USER ACQUISITION

Android vs iOS – Ad Spend % by Platform in 2020

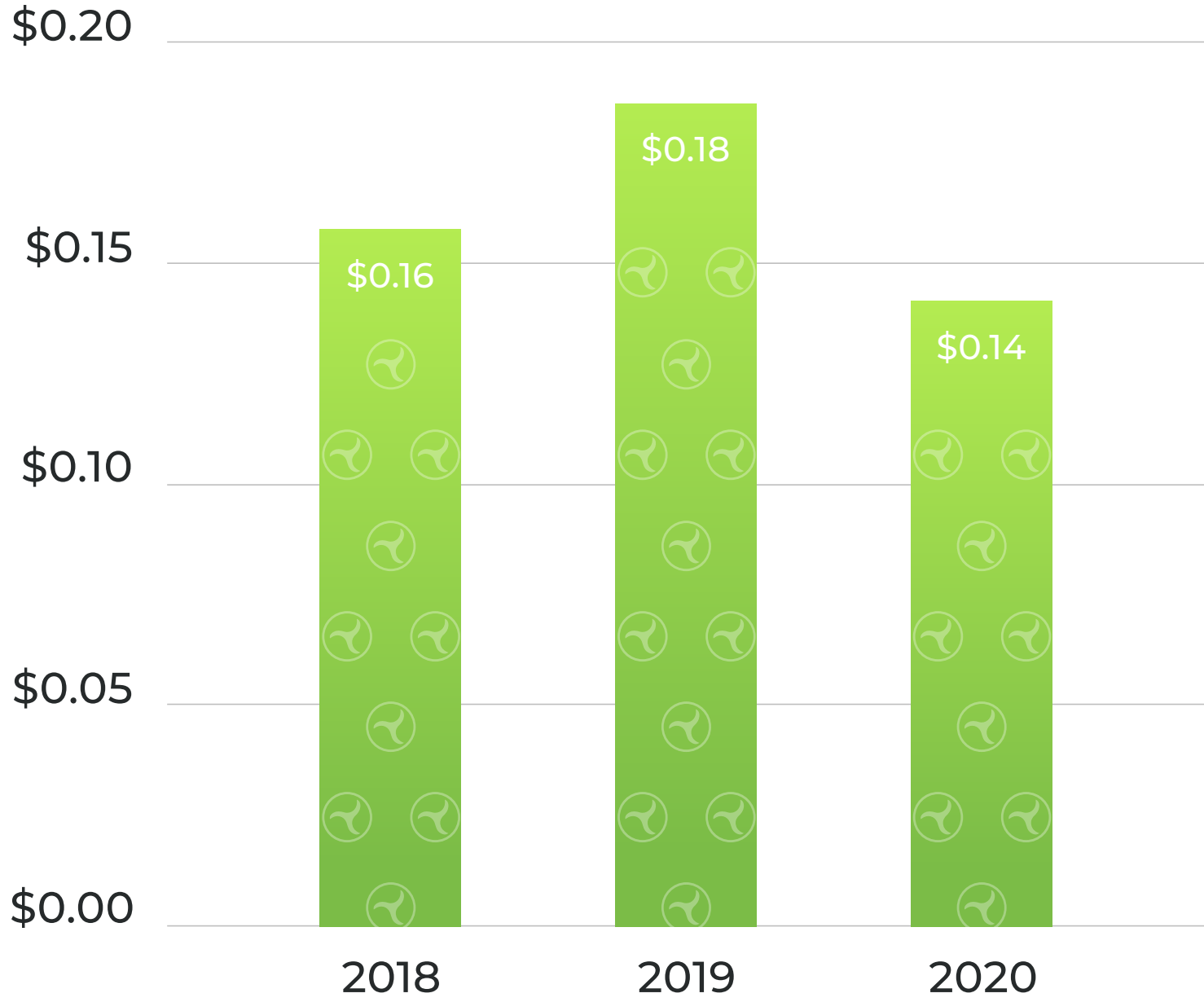
- Ad spend on Android in the first half of 2020 increased by 1 % compared to 2019. After Apple's announcement on effectively deprecating IDFA during WWDC 2020, Android ad spend bumped by 3% in the second half of the year.

Read more on what to expect in the upcoming [attribution shift](#).



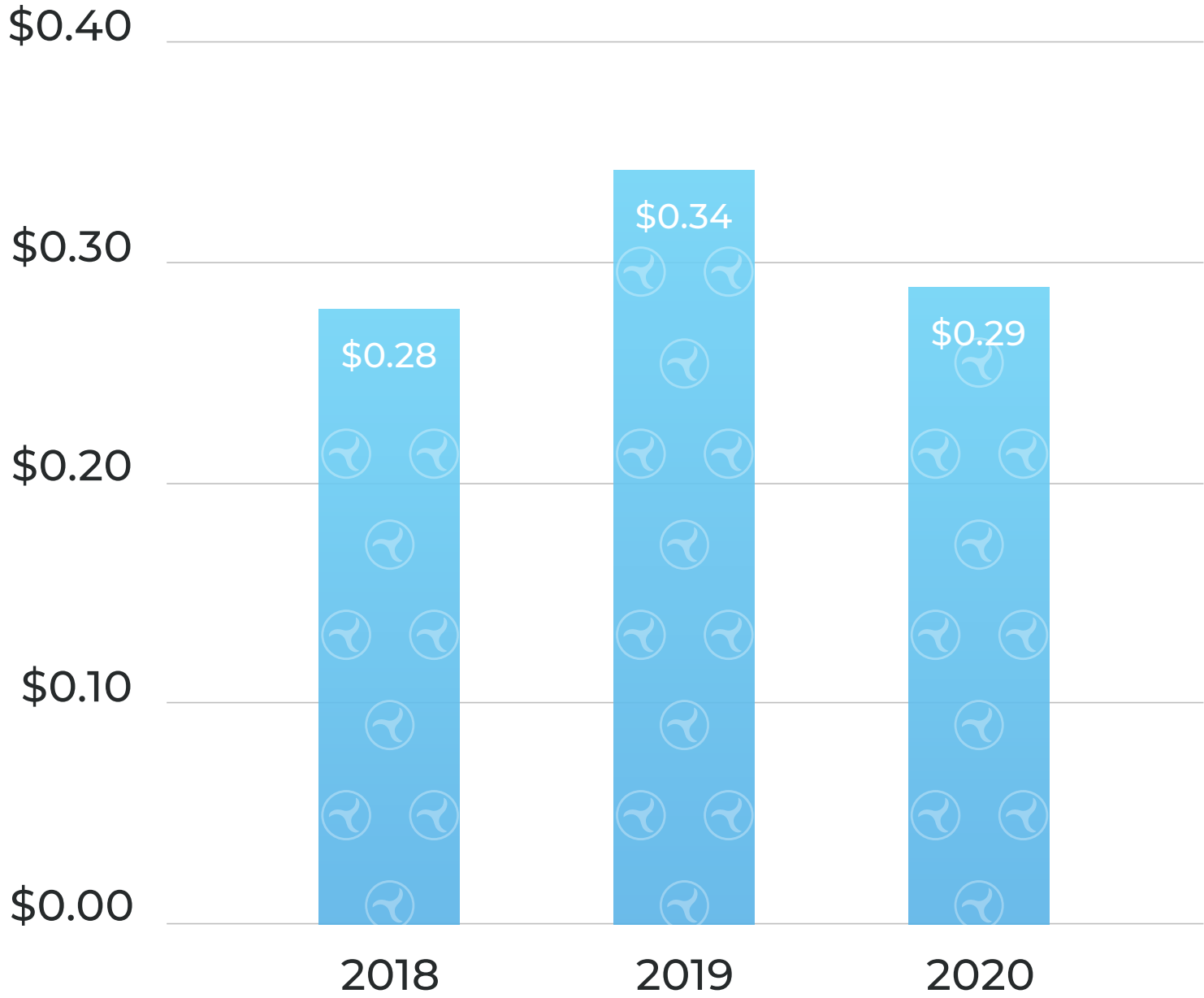
Android - Median CPI by Platform YoY

🔄 In 2020, Android CPI of \$0.14 decreased by \$0.04 from 2019. Placing it below that of 2018.



iOS – Median CPI by Platform YoY

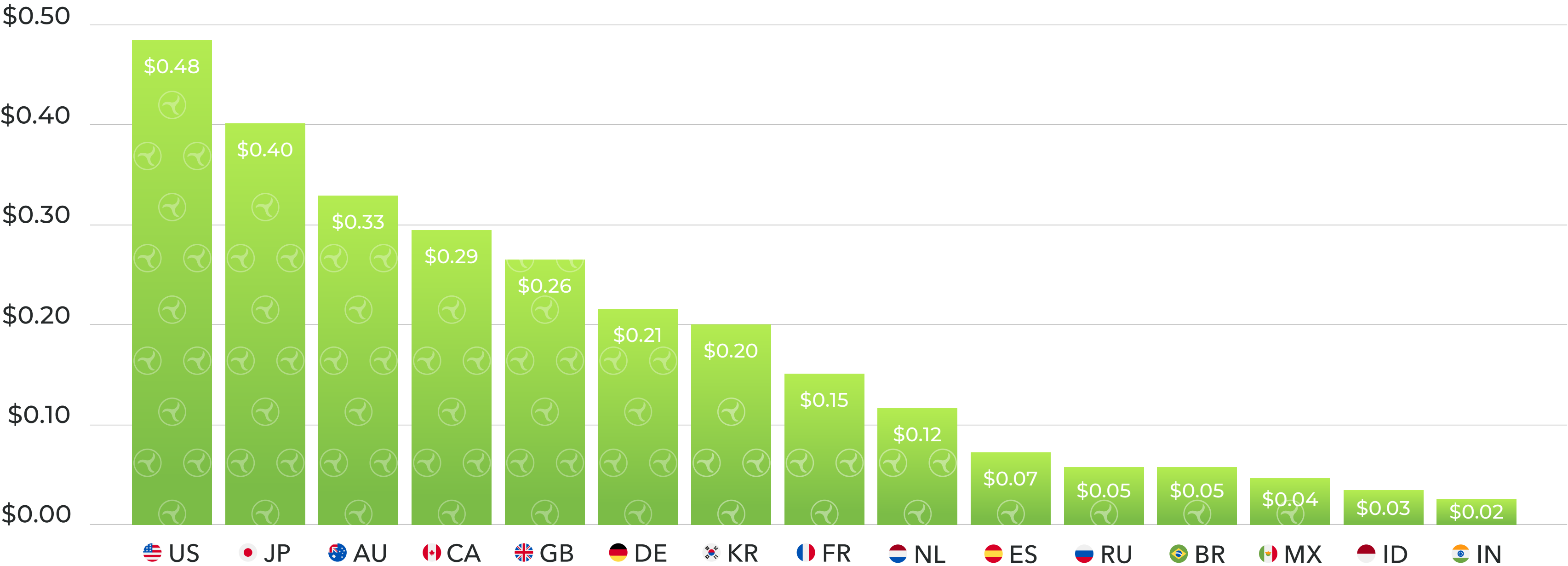
🔄 In 2020, iOS CPI of \$0.29 decreased by \$0.05 from 2019.



Android - Median CPI for Top 15 Countries by Ad Spend in 2020

India remains the most cost-effective country for ad spend on Android with a CPI of \$0.02.

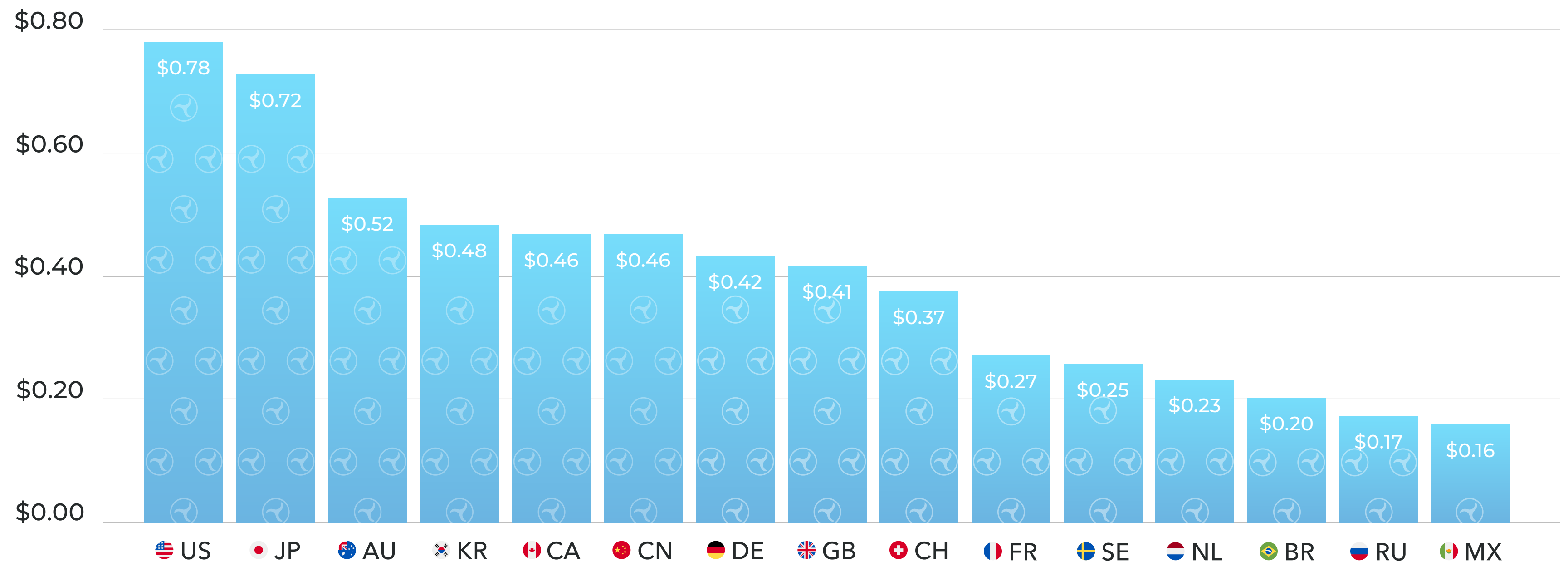
Hyper-casual CPIs are still very affordable. Especially on Android, with the Netherlands being the least expensive Tier 1 country.



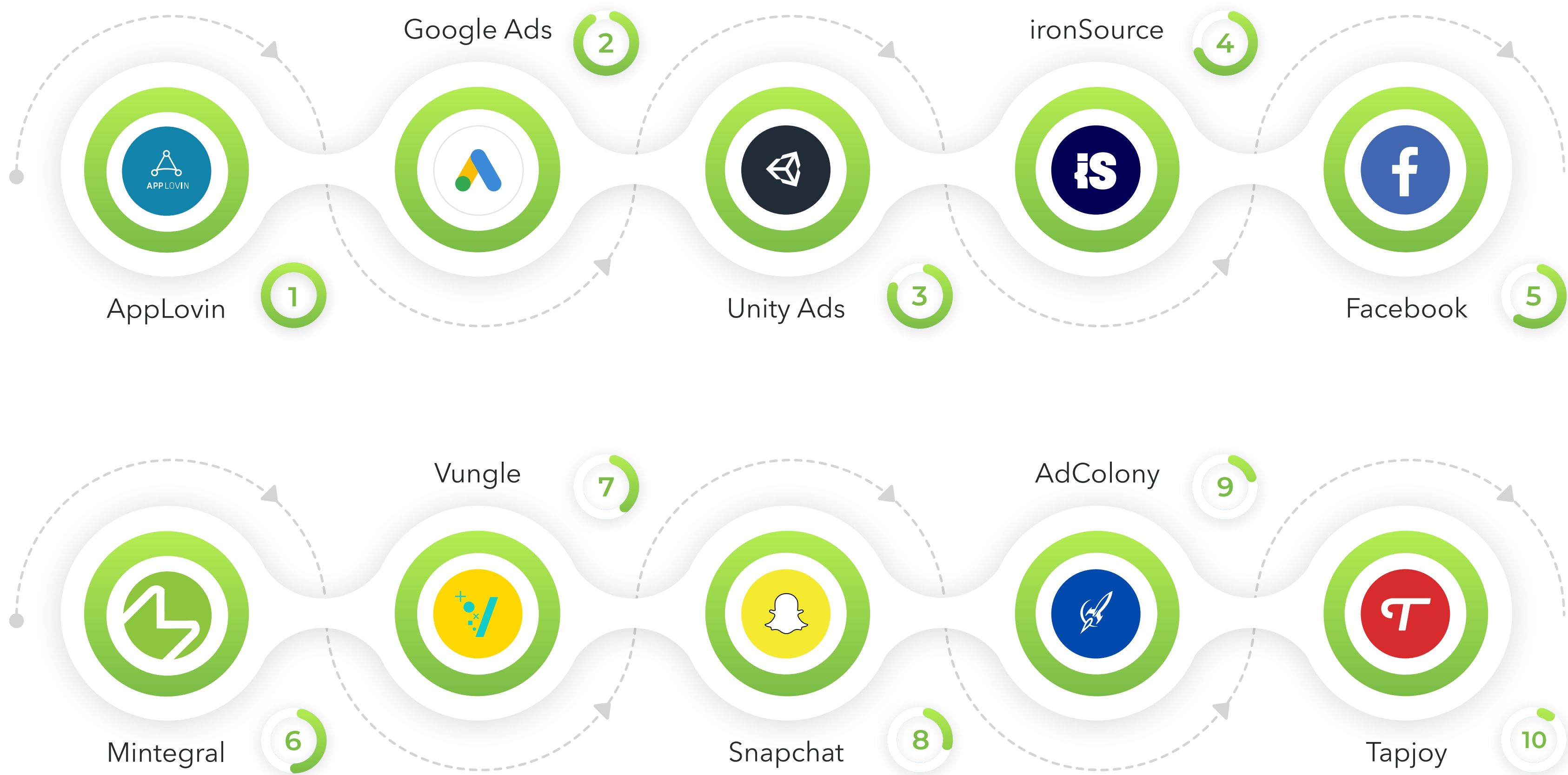
iOS – Median CPI for Top 15 Countries by Ad Spend in 2020

🔄 In 2019 Brazil was the most cost-effective country based on CPI. This year it is Mexico, with a \$0.04 increase for Brazil this year.

🔄 The US remains the most expensive country with the highest median CPI across both iOS and Android.



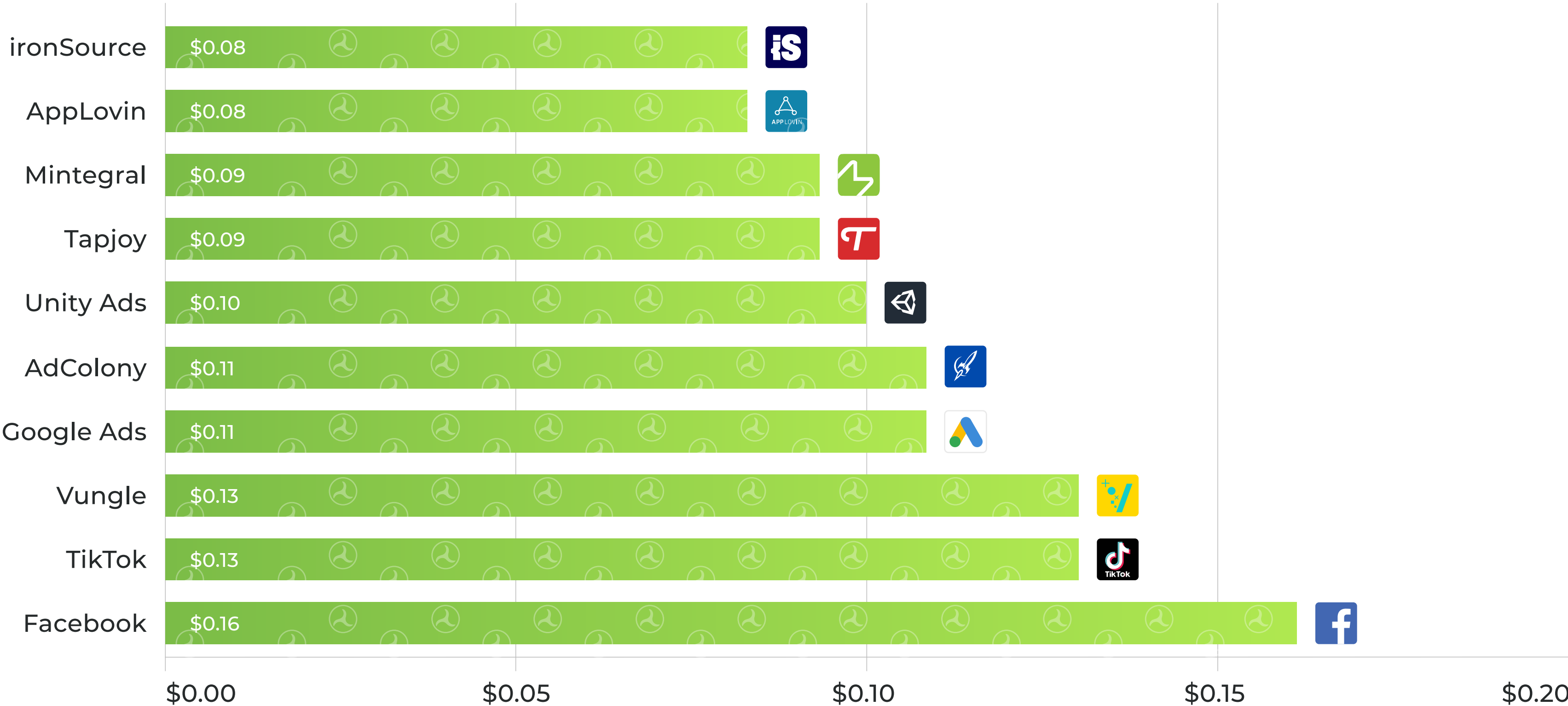
Android - Top 10 Ad Networks by Ad Spend in 2020



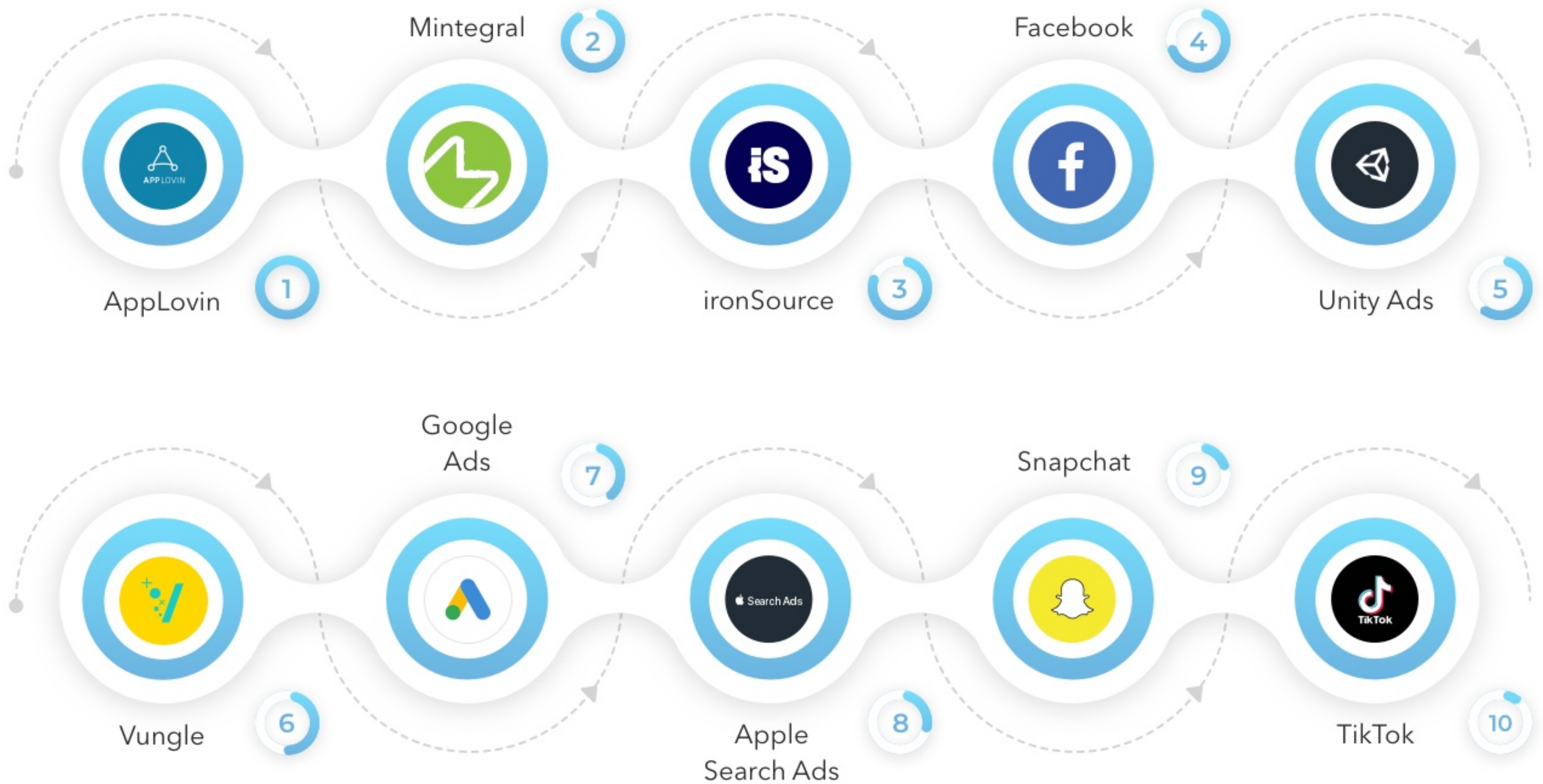
Android – Median CPI for Top 10 Ad Networks by Ad Spend in 2020

🕒 In the Top 10 ad networks ironSource holds the No. 1 spot with a CPI of \$0.08, the lowest CPI.

🕒 Welcome TikTok to the Top 10 with a CPI of \$0.13.



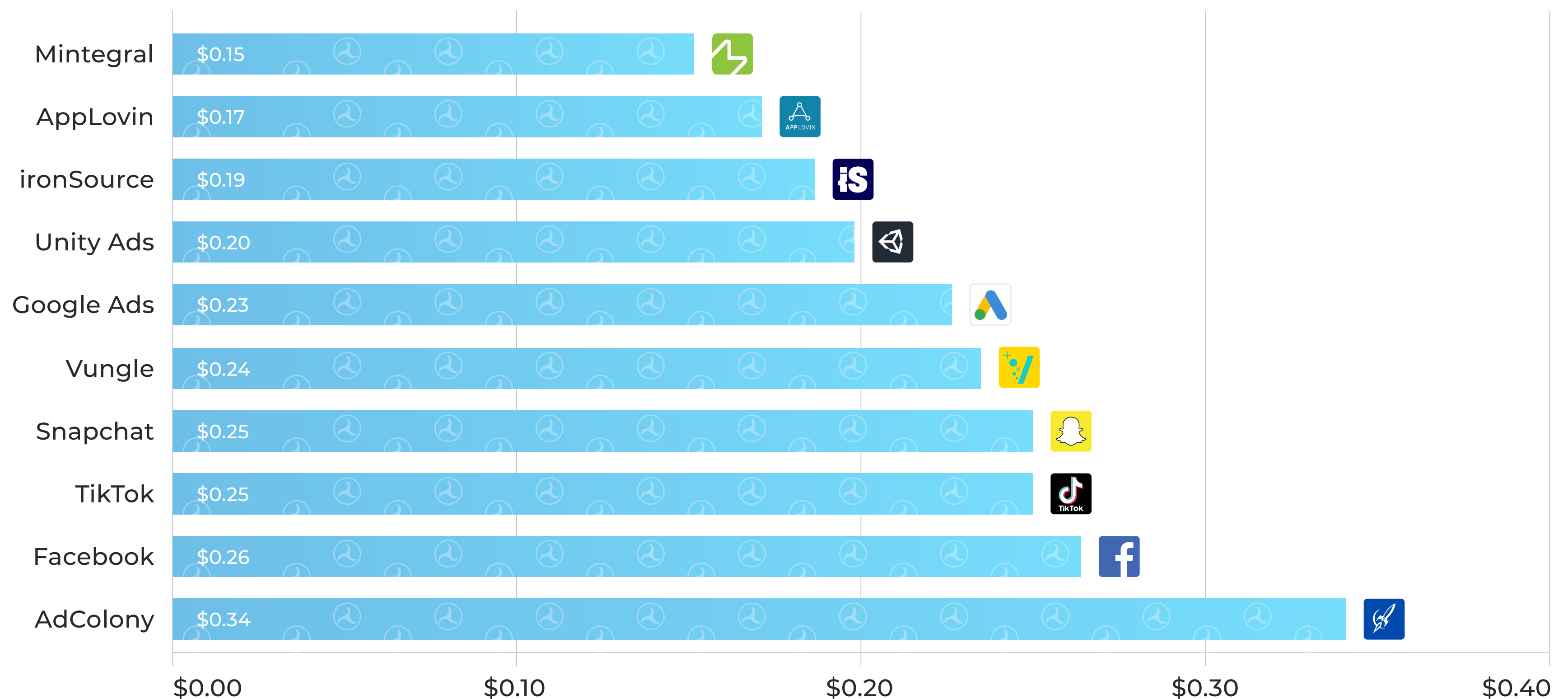
iOS – Top 10 Ad Networks by Ad Spend in 2020



iOS – Median CPI for Top 10 Ad Networks by Ad Spend in 2020

TikTok makes the cut with a CPI for iOS of \$0.25.

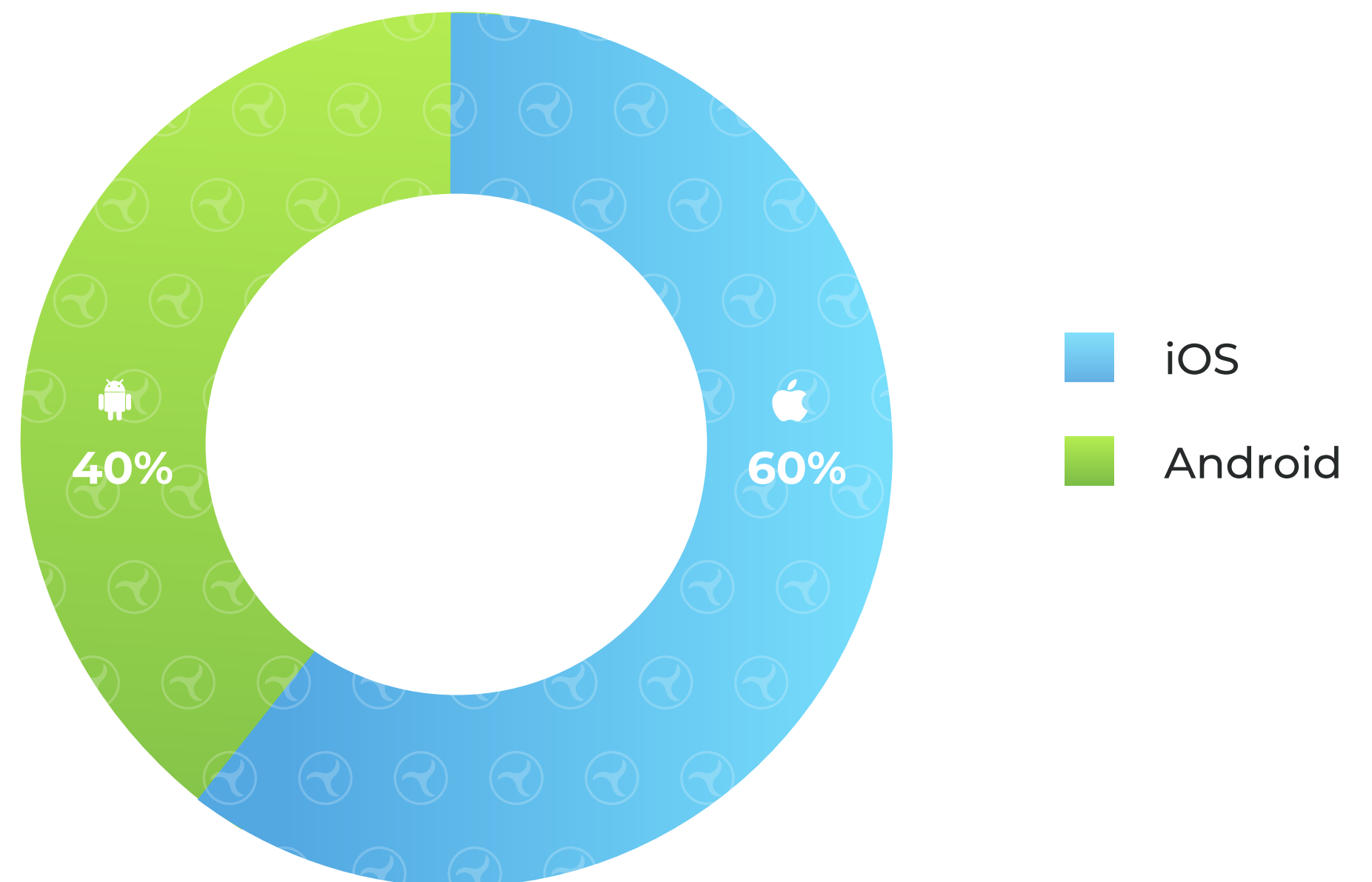
There's only a 1-2 cents difference in CPIs for the Top 9 ad networks until Facebook, with a difference of \$0.08 to Ad Colony.



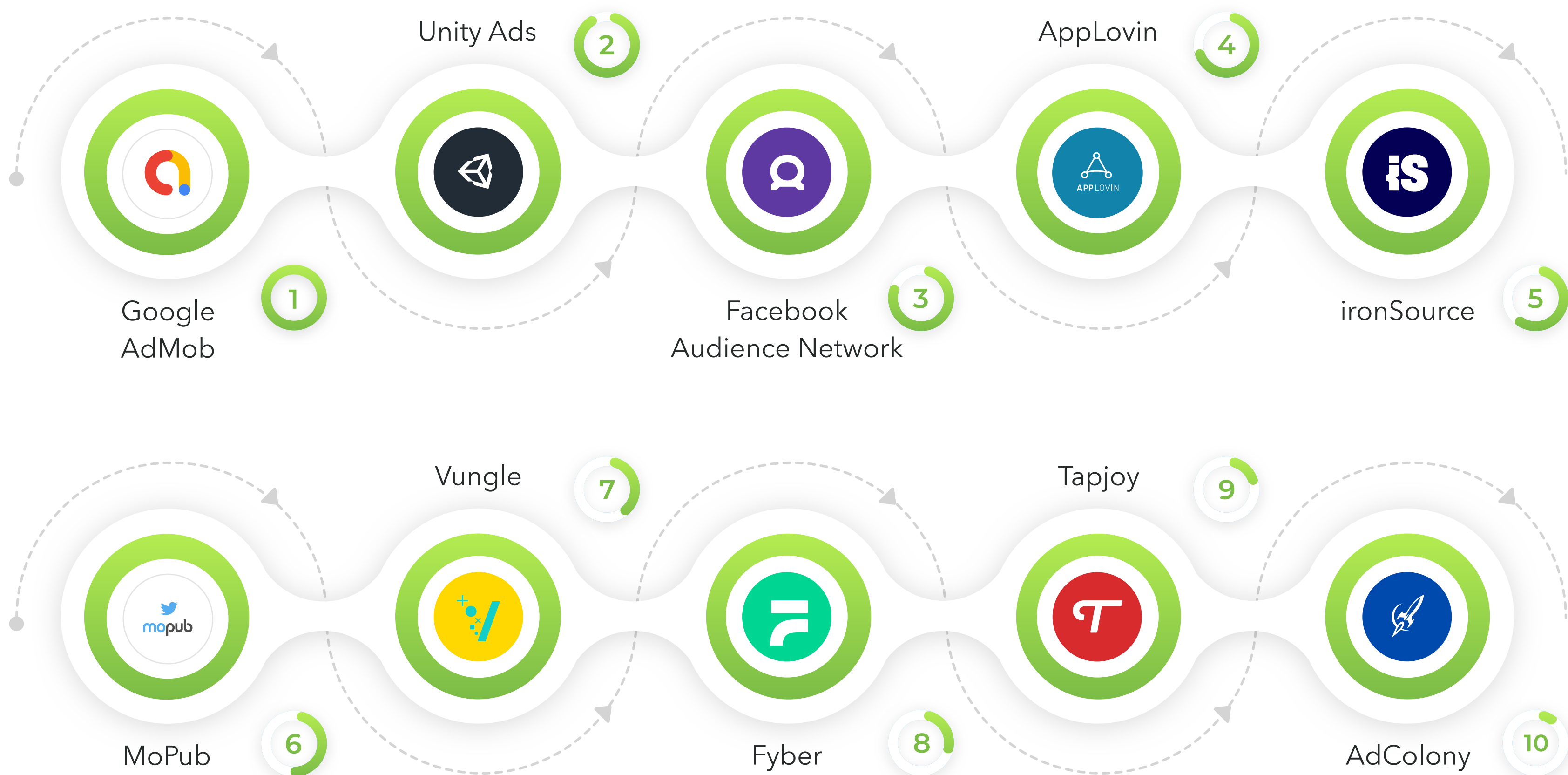
AD MONETIZATION

Android vs iOS – Ad Revenue % by Platform in 2020

- ⌚ Total ad revenue share decreased on iOS by 3% from 2019. Android ad revenue share has, respectively, increased by 3%.



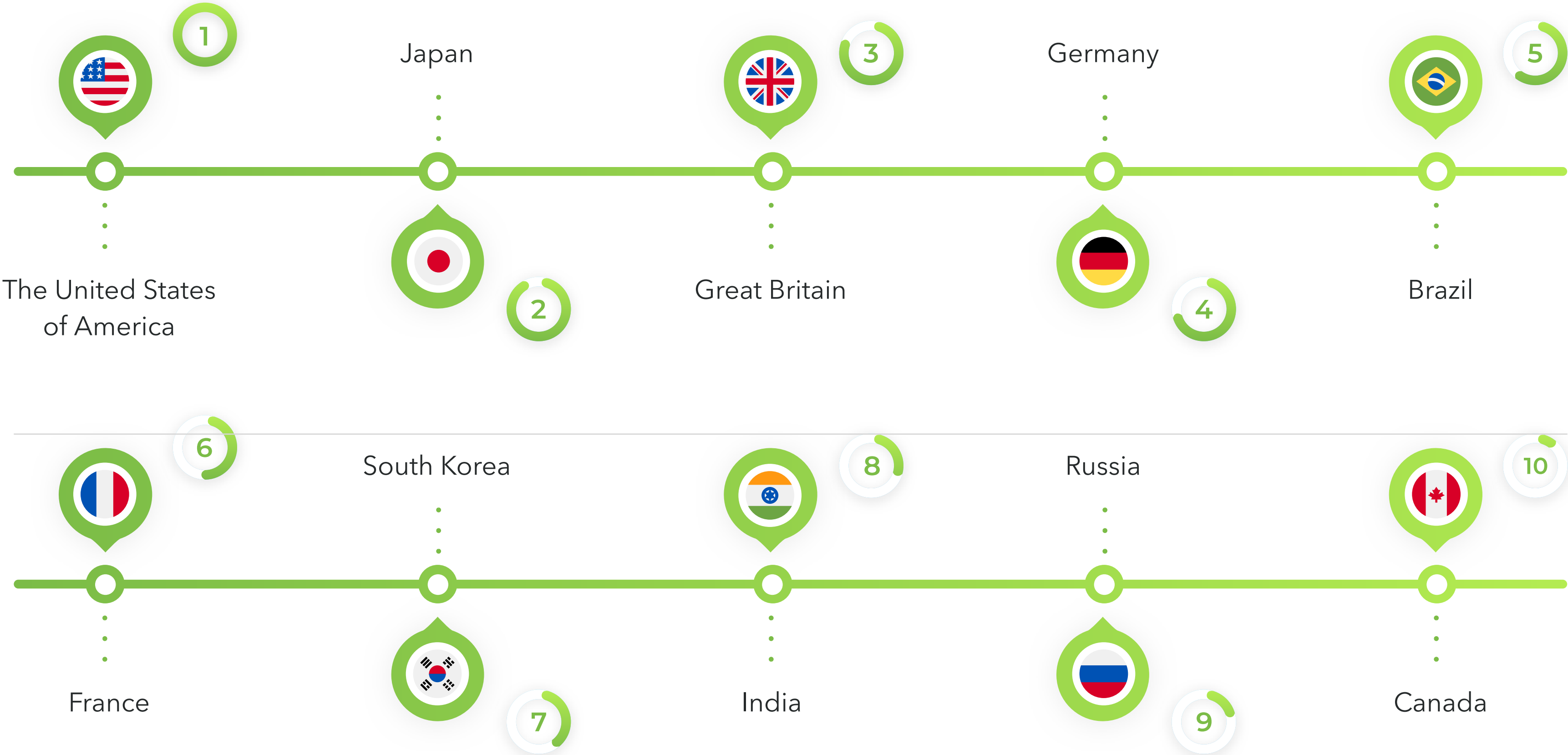
Android - Top 10 Ad Networks by Ad Revenue in 2020



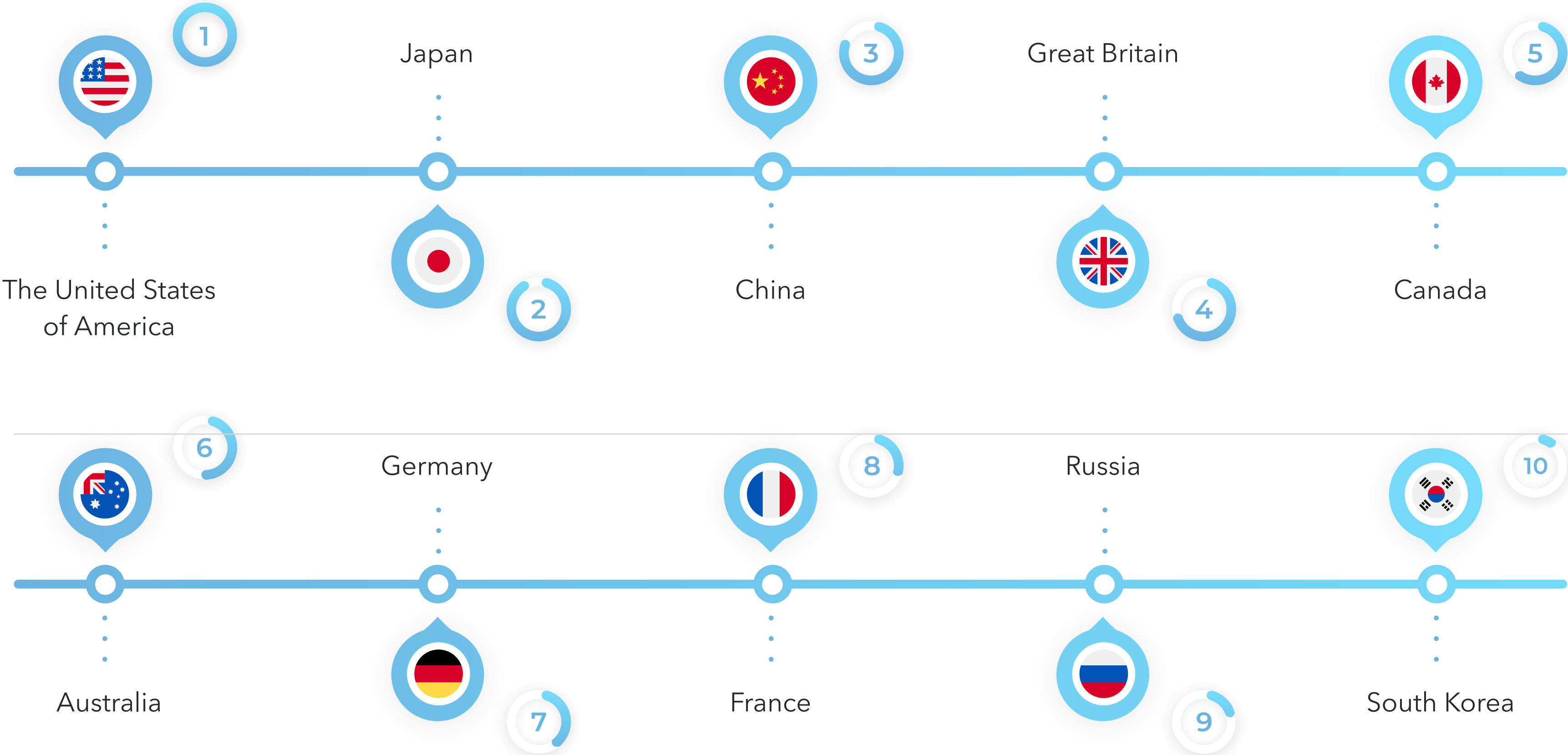
iOS – Top 10 Ad Networks by Ad Revenue in 2020



Android - Top 10 Countries by Ad Revenue in 2020



iOS – Top 10 Countries by Ad Revenue in 2020



WHY DO CUSTOMERS USE TENJIN?



Tools: Our Products

Free attribution.
Ad Revenue LTV and ROI.
Cost aggregation.
Automation APIs.
Data Science platform.
Internal BI on demand.



Training

Evergrowing library of exclusive training materials on topics like UA and Ad monetization for Indies, game publishing, data science and others. Live 1x1 sessions with Product and Success team. Code and query templates for real live use cases.



Pricing

Free to start. Pay as you grow without a long-term commitment. Perfect for hyper-casual and Indie studios.



iOS 14-proof measurement

One dashboard for SKAdNetwork and deterministic attribution. Cohort LTV and ROI metrics for all ad networks. Privacy-centric attribution technology.

Sign up for free at
tenjin.com

Sign up

CHANGE LOG

v1 (28.01.21) – Initial release

v1.1 (29.01.21) – Error due to miscalculations on page 18, Android - Top 10 ad networks by ad revenue 2020 has been fixed:

- 🔄 Unity Ads and Applovin are included in the top ranking.
- 🔄 Mintegral and Chartboost have been excluded.
- 🔄 Ranking for the top 10 have been changed.