

Hyper-Casual Games Benchmark Report

Q4 2022





Executive Summary



GameAnalytics



Android

Android ad spend share stands at 52%.



iOS

Median CPI on iOS is now at an all-time high at \$0.42



China

China has the lowest median CPI on iOS



India

India has the lowest median CPI on Android



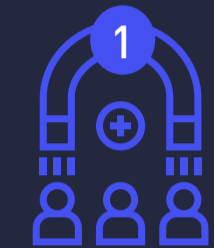
Mintegral

Mintegral has the lowest median CPI on Android and iOS



AppLovin

Applovin is the number 1 ad network in terms of ad spend share on Android and iOS



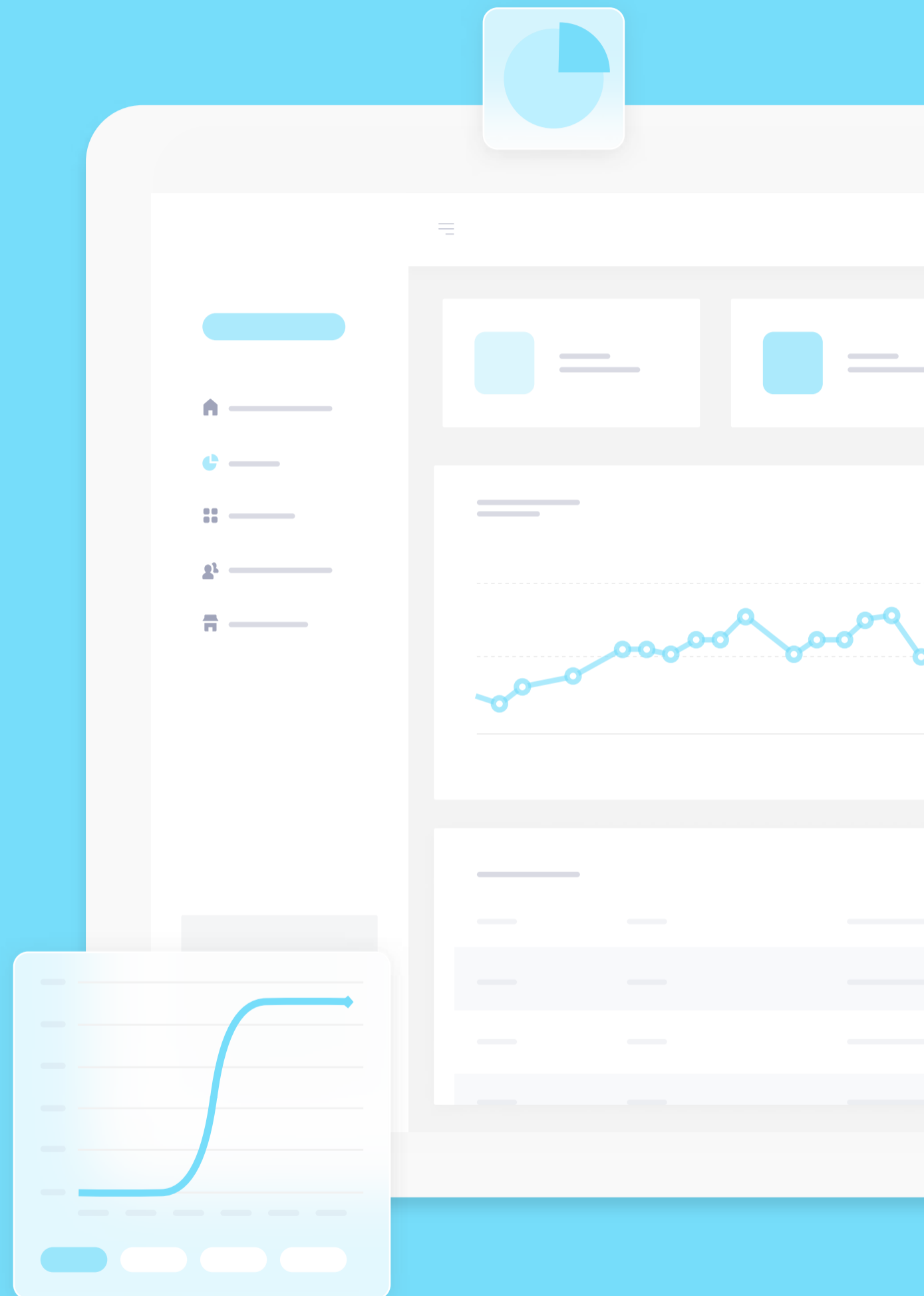
Day 1 Retention

The top 2% of games have a Day 1 retention of 45% on iOS, and 38% on Android



Day 7 Retention

The top 2% of games have a Day 7 retention of 19% on iOS, and 14% on Android



Tenjin - Made for Hyper-Growth

Tenjin offers free to start, pay as you grow advertising measurement for mobile game and app developers. We help small and medium-sized companies punch above their weight with marketing insights that enable them to compete with giant publishers.

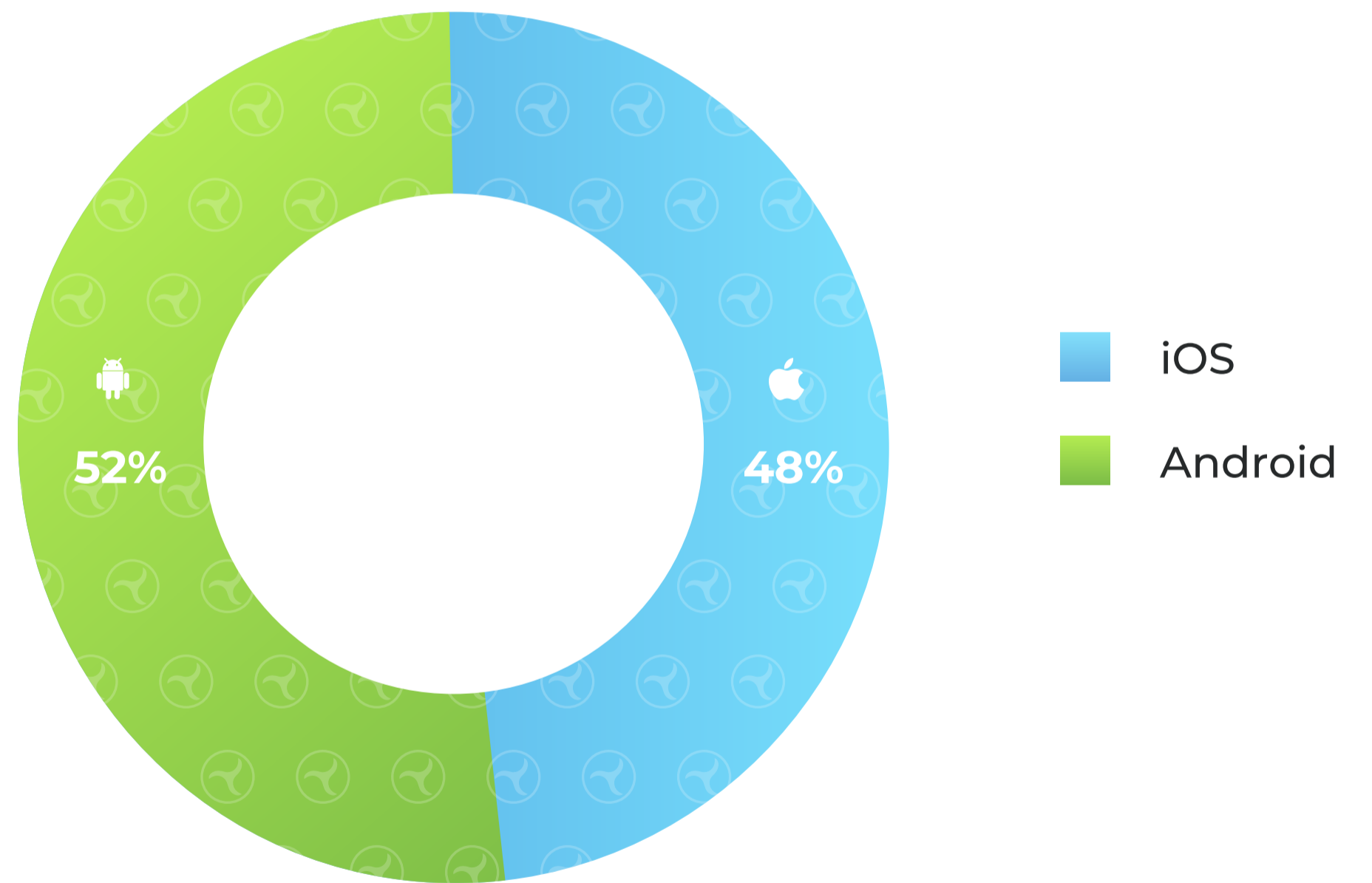
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Android vs iOS - Ad Spend % by Platform in Q4 2022

Compared to Q3 2022, Android has lost 5 percentage points of the ad spend share, while iOS has gained 5 percentage points respectively.

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Android vs iOS – Median CPI by Platform in Q4 2022

- Median CPI on Android has increased by \$0.05
- Median CPI on iOS has increased by \$0.17
- Both platforms reached an all-time high in median CPI in Q4 2022.



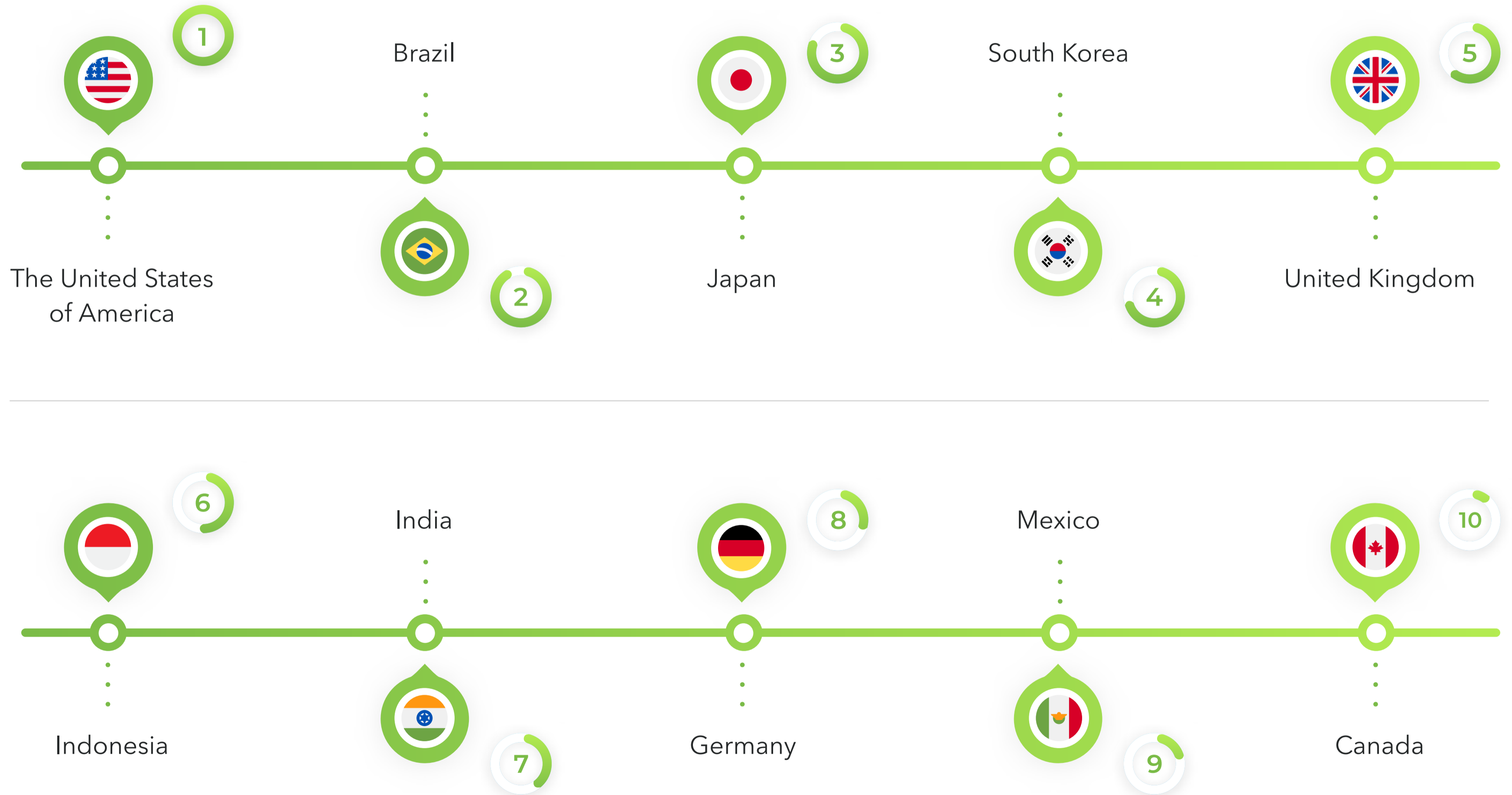
\$0.42



\$0.20






Android - Top 10 Countries by Ad Spend in Q4 2022

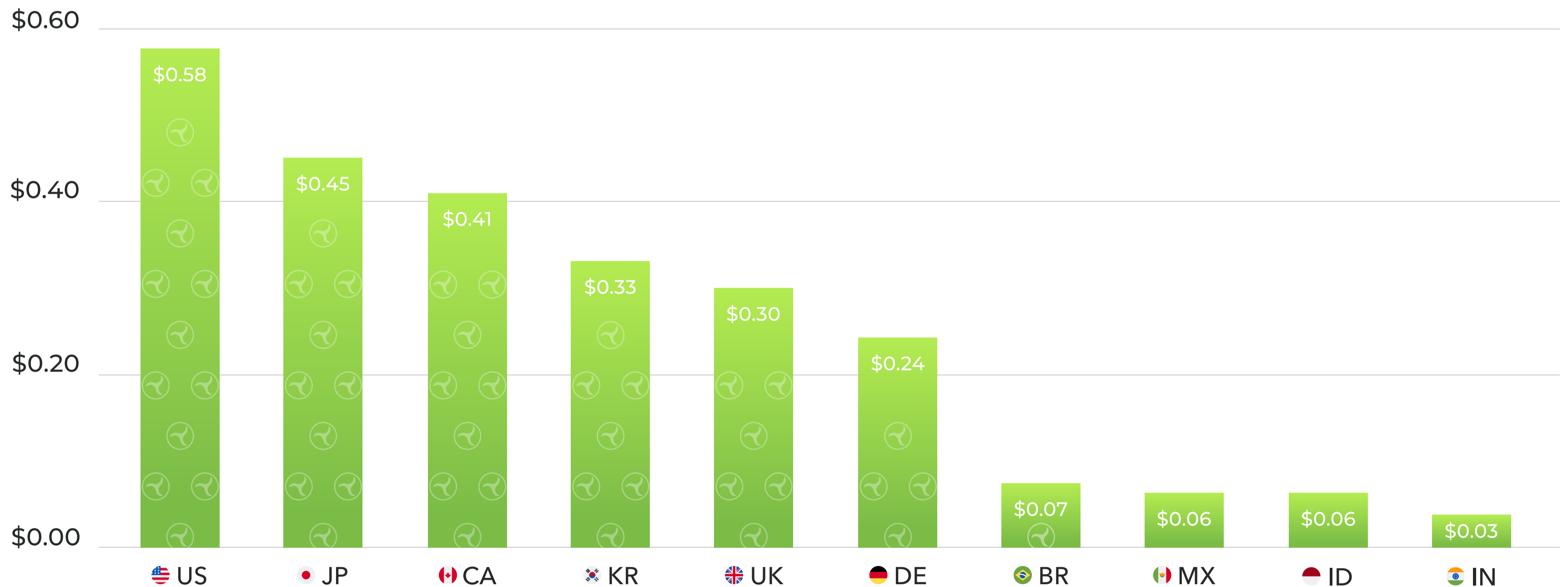




Android - Median CPI for Top 10 Countries by Ad Spend in Q4 2022

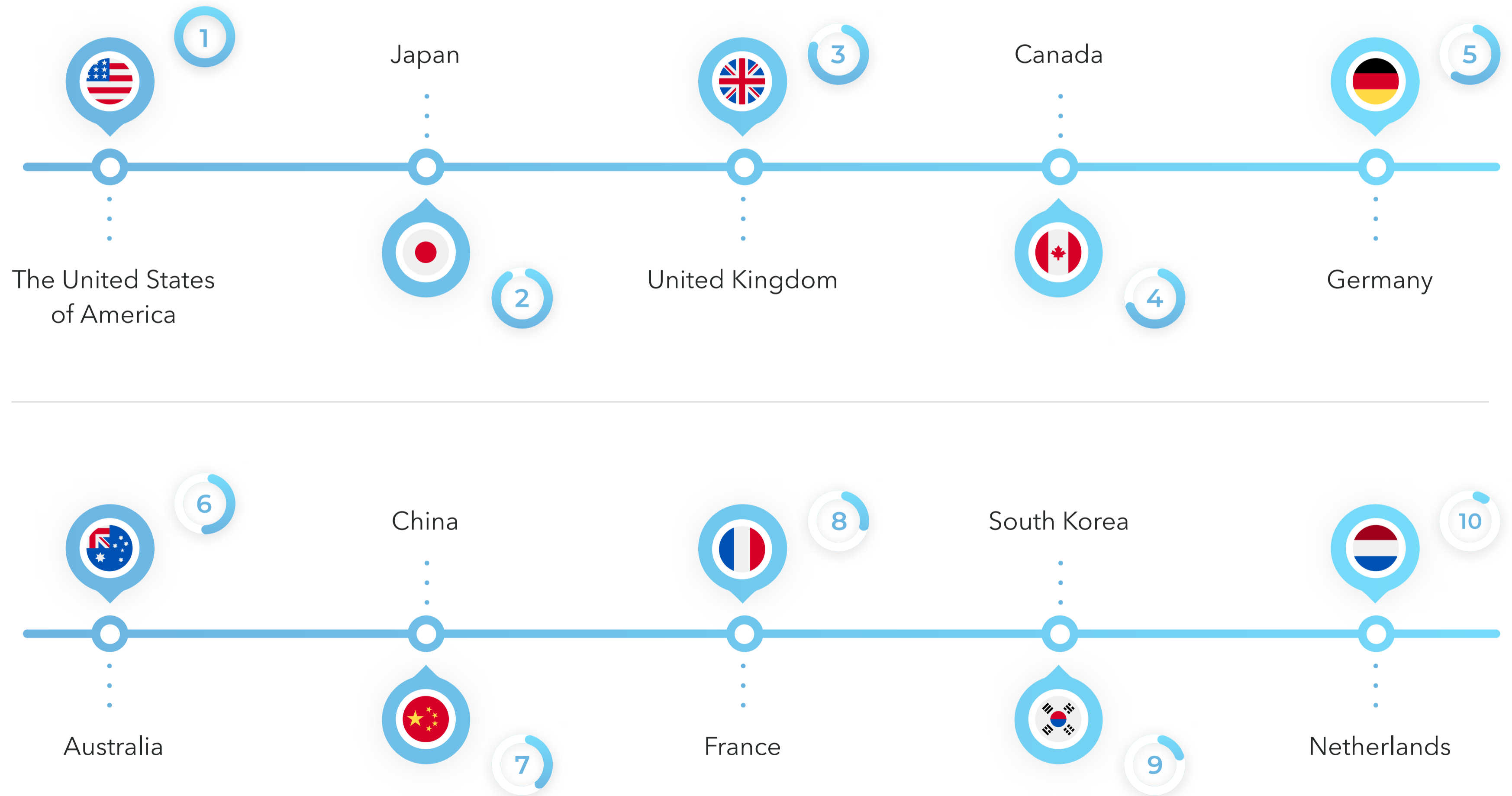
When compared to the Q3 2022 report:

-  No country has experienced a decrease in median CPI.
-  South Korea and Canada experienced the highest increase in median CPI (0.06).
-  Mexico is the only new country in the ranking, replacing France from the Q3 2022 rankings.





iOS - Top 10 Countries by Ad Spend in Q4 2022

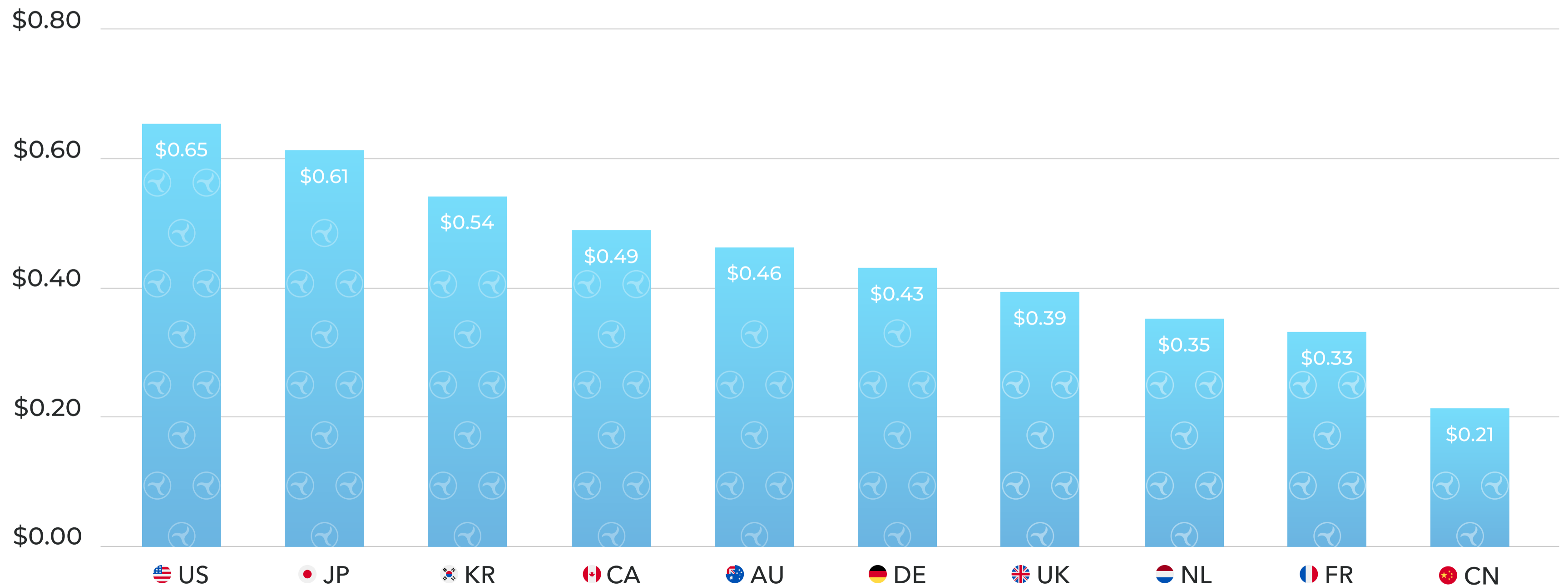




iOS - Median CPI for Top 10 Countries by Ad Spend in Q4 2022

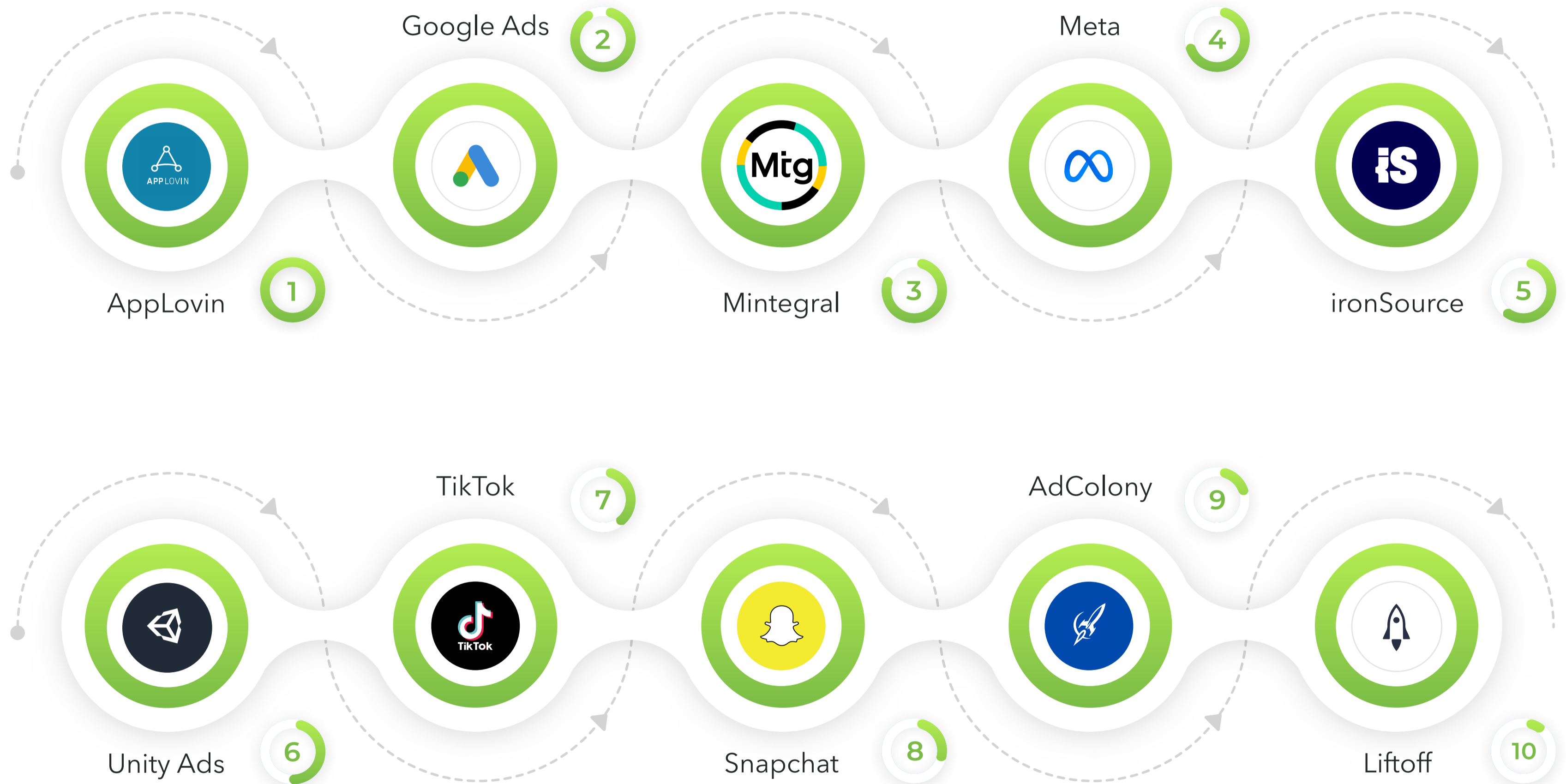
When compared to the Q3 2022 report:

- USA has the highest median CPI decrease of \$0.06.
- France and Germany have the highest median CPI increase of \$0.08.
- Netherlands is the only new country in the ranking, replacing Brazil from the Q3 2022 rankings.





Android - Top 10 Ad Networks by Ad Spend in Q4 2022

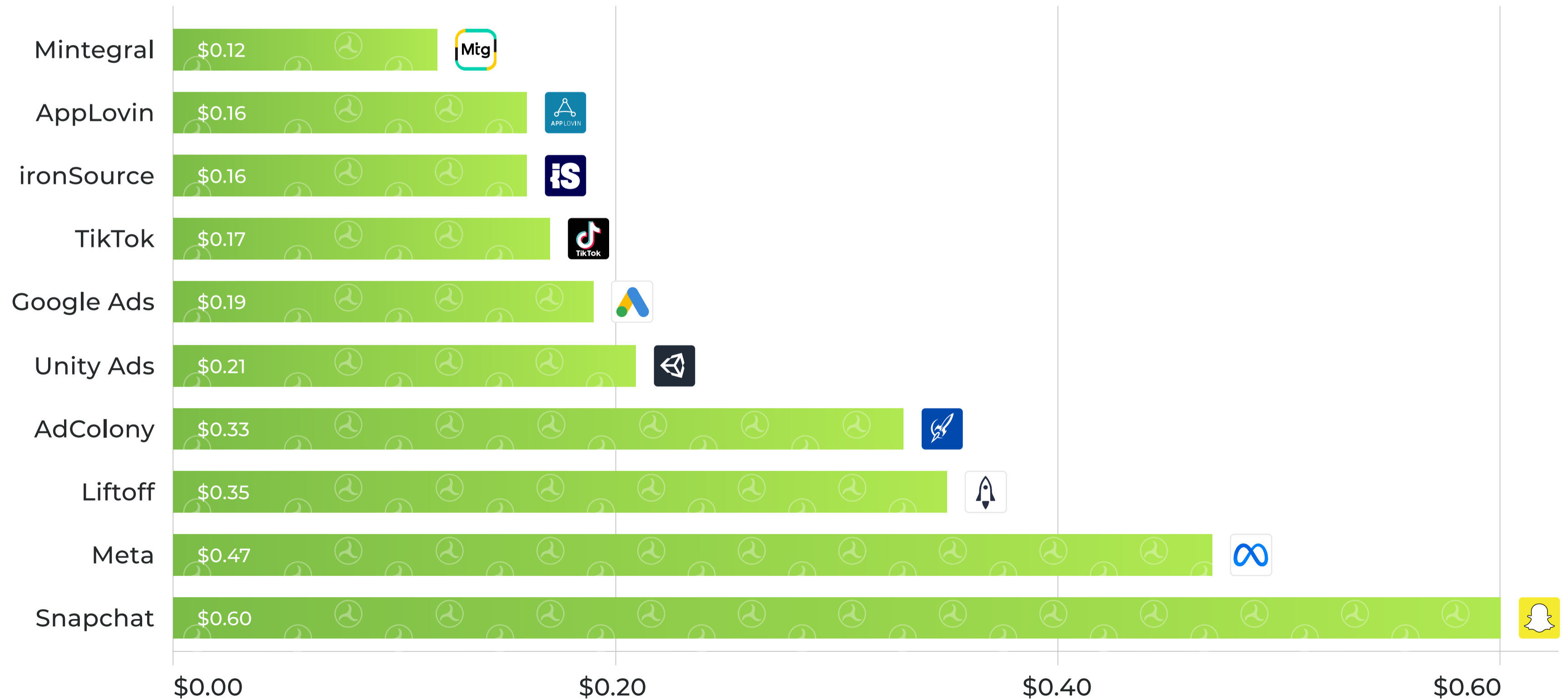




Android - Median CPI for Top 10 Ad Networks by Ad Spend in Q4 2022

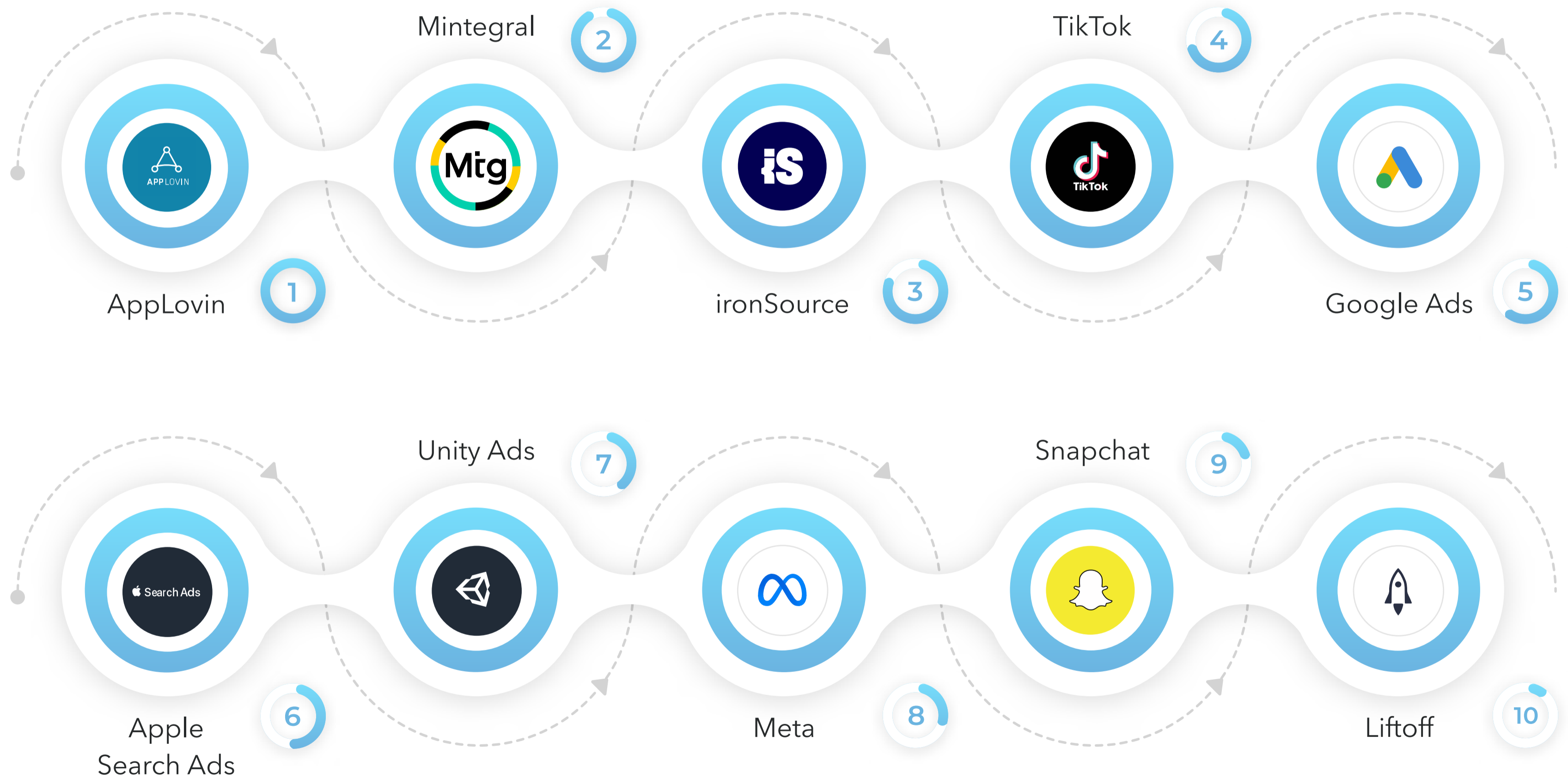
When compared to the Q3 2022 report:

- None of the ad networks experienced a decrease in median CPI.
- Snapchat has the highest median CPI increase of \$0.39.
- There are no new ad networks in the ranking.





iOS - Top 10 Ad Networks by Ad Spend in Q4 2022

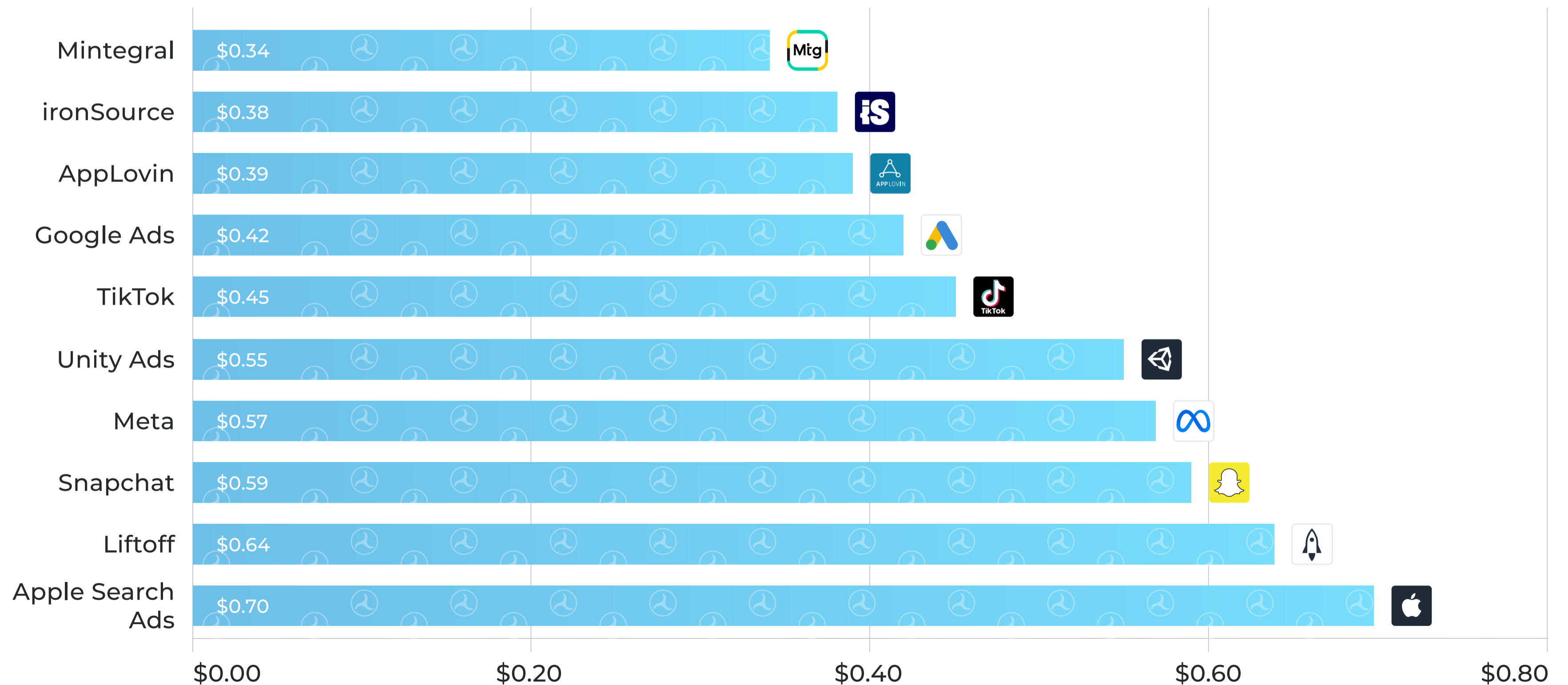




iOS - Median CPI for Top 10 Ad Networks by Ad Spend in Q4 2022

When compared to the Q3 2022 report:

- None of the ad networks experienced a decrease in median CPI.
- Unity Ads had the highest median CPI increase of \$0.4.
- Meta is the only new ad network in the ranking.



GameAnalytics



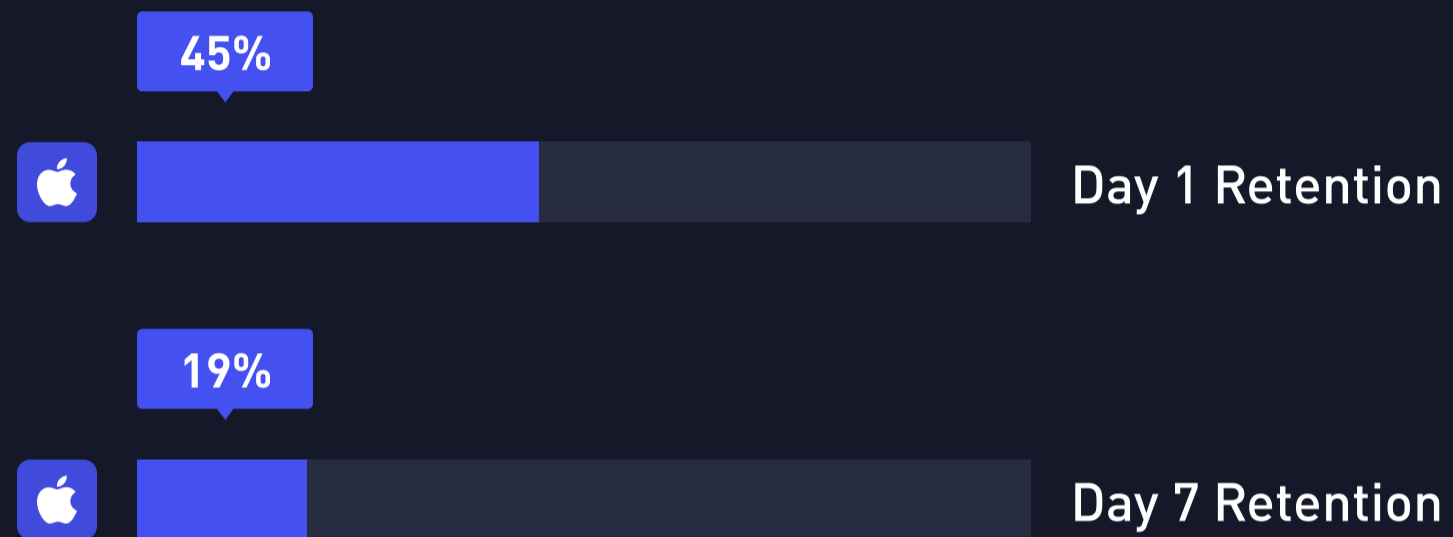
GameAnalytics is the #1 analytics tool for game developers, providing insights for more than 100k games, and 1/3 of the world's mobile players.

GameAnalytics' goal is to empower game developers and publishers with priceless insights that help untap the true potential of their games.

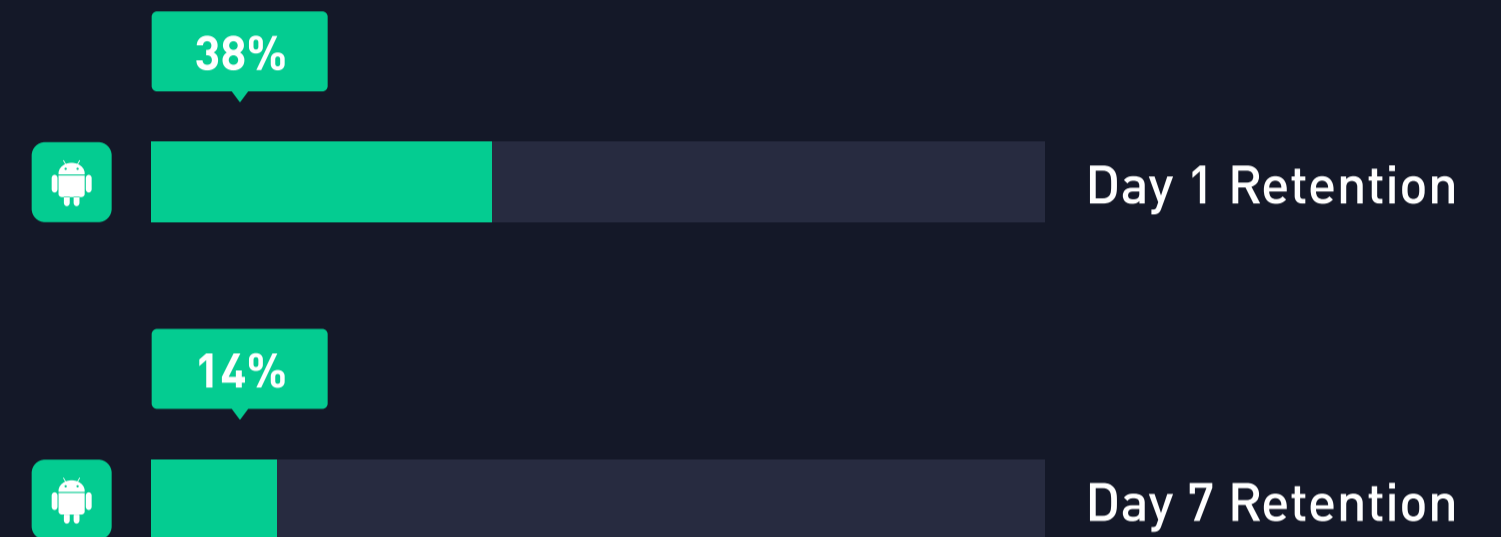


iOS vs Android - Retention Benchmark by platform in Q4 2022

Top 2% of games



Top 2% of games



Top 25% of games



Top 25% of games





iOS vs Android - Retention Benchmark by platform in Q4 2022

Median of all games



Median of all games



- There is a large gap in Day 1 and Day 7 retention rate between a great game (top 2%), a good game (top 25%), and an average game (Median) on both iOS and Android.
- Day 1 and Day 7 retention rate for hyper-casual games is better on iOS than Android across all categories of games (great, good and average).



Methodology

The benchmark report consists of anonymized data collected by Tenjin and GameAnalytics for hyper-casual games in the date range of 01.10.2022 - 31.12.2022

The CPI reports for the top ad networks are compiled from the data on ad networks in the 'Top 10 ad networks by ad spend'.

Only countries that surpassed the thresholds of \$1 million of ad spend were included in the CPI report by country.

GameAnalytics data has been collected via the GameIntel tool.





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Cost and ad revenue aggregation

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