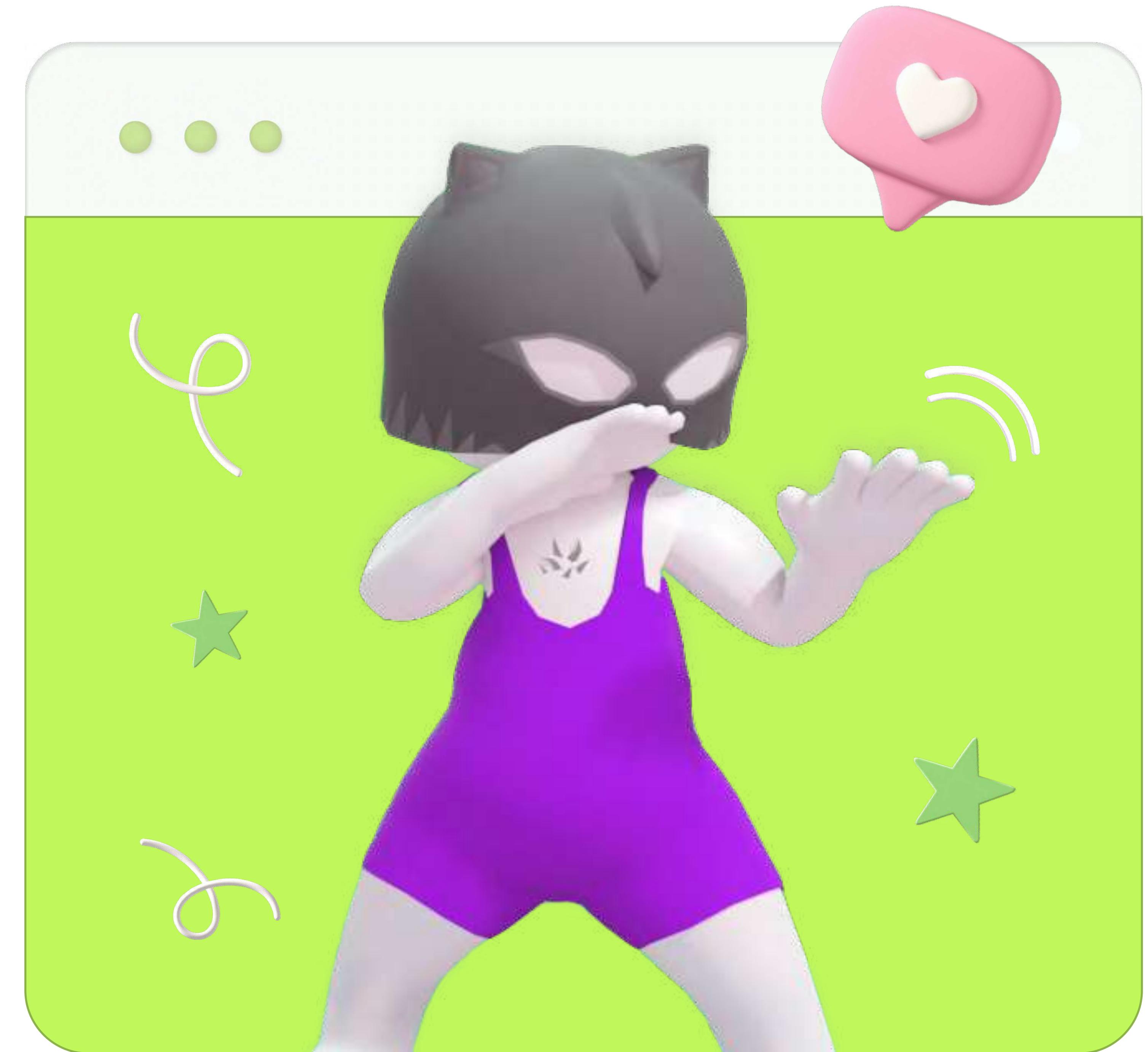
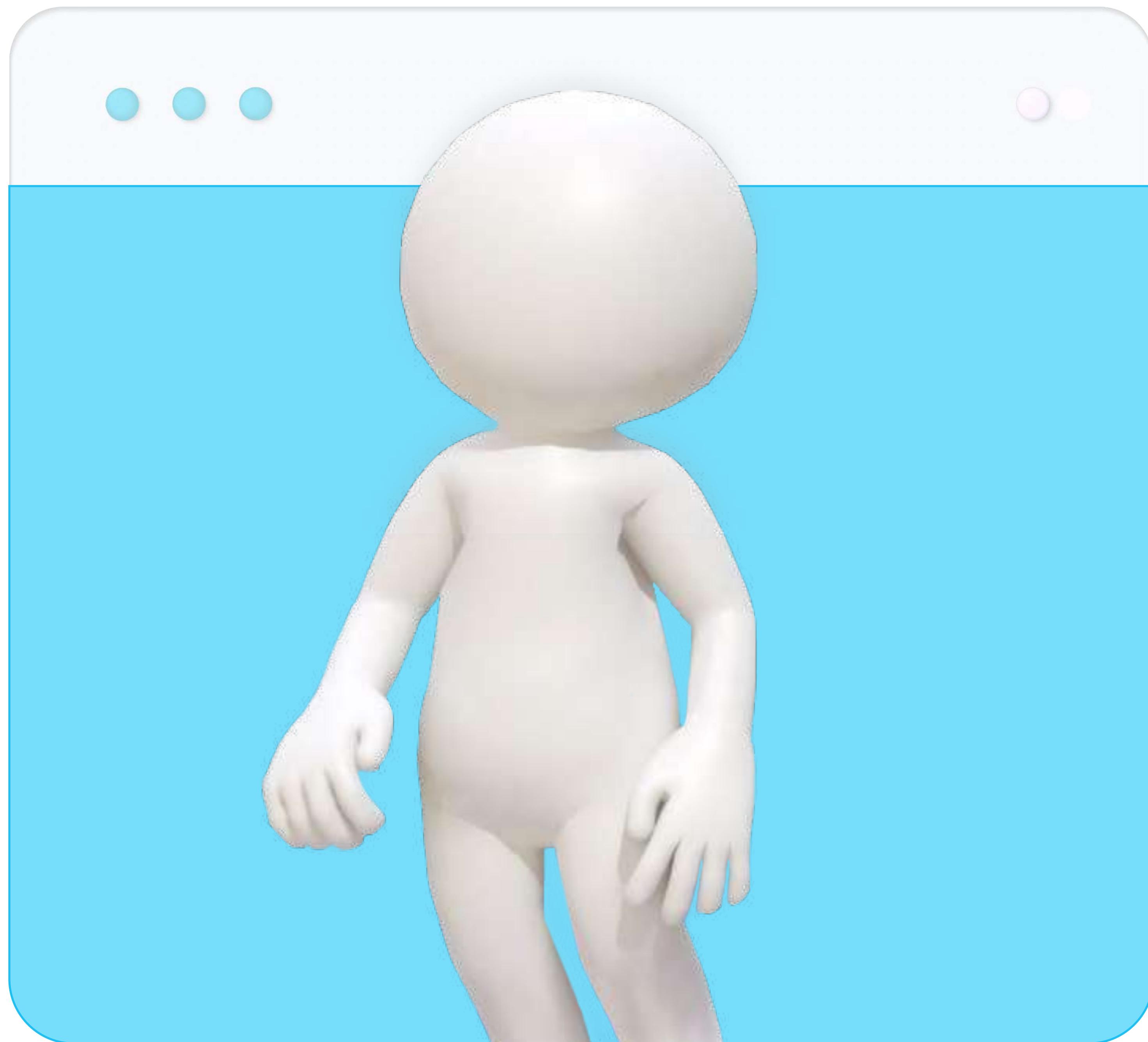


From **Hyper** to **Hybrid** in 2023

Trends and rankings to prepare you for the transition





Introduction

Tenjin was there at the inception of the hyper-casual genre. Our free dashboard, pioneering ad revenue LTV metrics, and data warehouse for marketers (DataVault), along with other top-notch tools, have helped thousands of developers to scale their apps and build sustainable business models. We were the first to introduce a cost-effective mobile marketing toolset that empowered smaller developers of new game genres to start publishing their hyper-casual games on their own.

Today, the hyper-casual business is no longer as profitable as it used to be. There is a strong downward trend in ad revenue due to App Tracking Transparency (ATT) on iOS, changes in user-behavior post-COVID, and various other factors. Some publishers have stopped accepting hyper-casual games from third-party developers completely. And those that do still accept them demand the metrics of an “absolute hit” game. As a result, we see more and more developers opting for self-publishing instead of focusing solely on game development. Moreover, hyper-casual developers have started doing what they do best—innovating. They are adapting to the changing market by increasing the use of in-app purchases (IAPs) and the integration of meta gameplay components.

In conclusion, we are seeing a mass transition of hyper game developers to hybrid ones. This is why we have decided to cover the entire Tenjin data set—including hybrid games—instead of just focusing on the hyper-casual industry.

In this report, we are not only going to take a closer look at the trends mentioned above. Our goal is to help smoothen the transition to hybrid by providing essential insights in the form of rankings that cover both sides of the coin: advertising and monetization.



Summary



Ad impressions and eCPMs declined for both Android and iOS in 2022



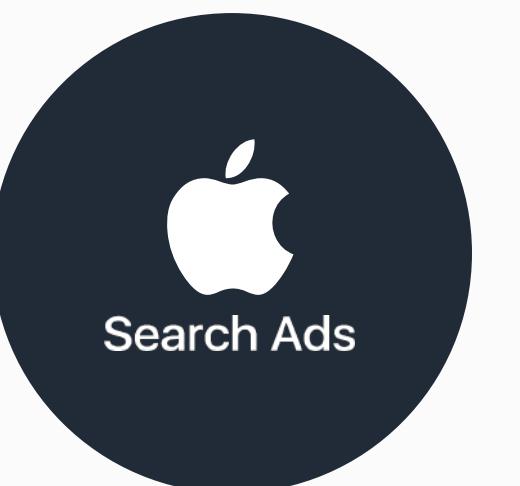
The number of IAPs grew on both Android and iOS in 2022



India ranked #1 in the category of countries with the highest number of installs on Android



The USA ranked #1 for ad revenue and in-app purchases on both Android and iOS



The iOS ad network rankings show that Apple Search Ads occupies the majority of #1 positions, with a total of three



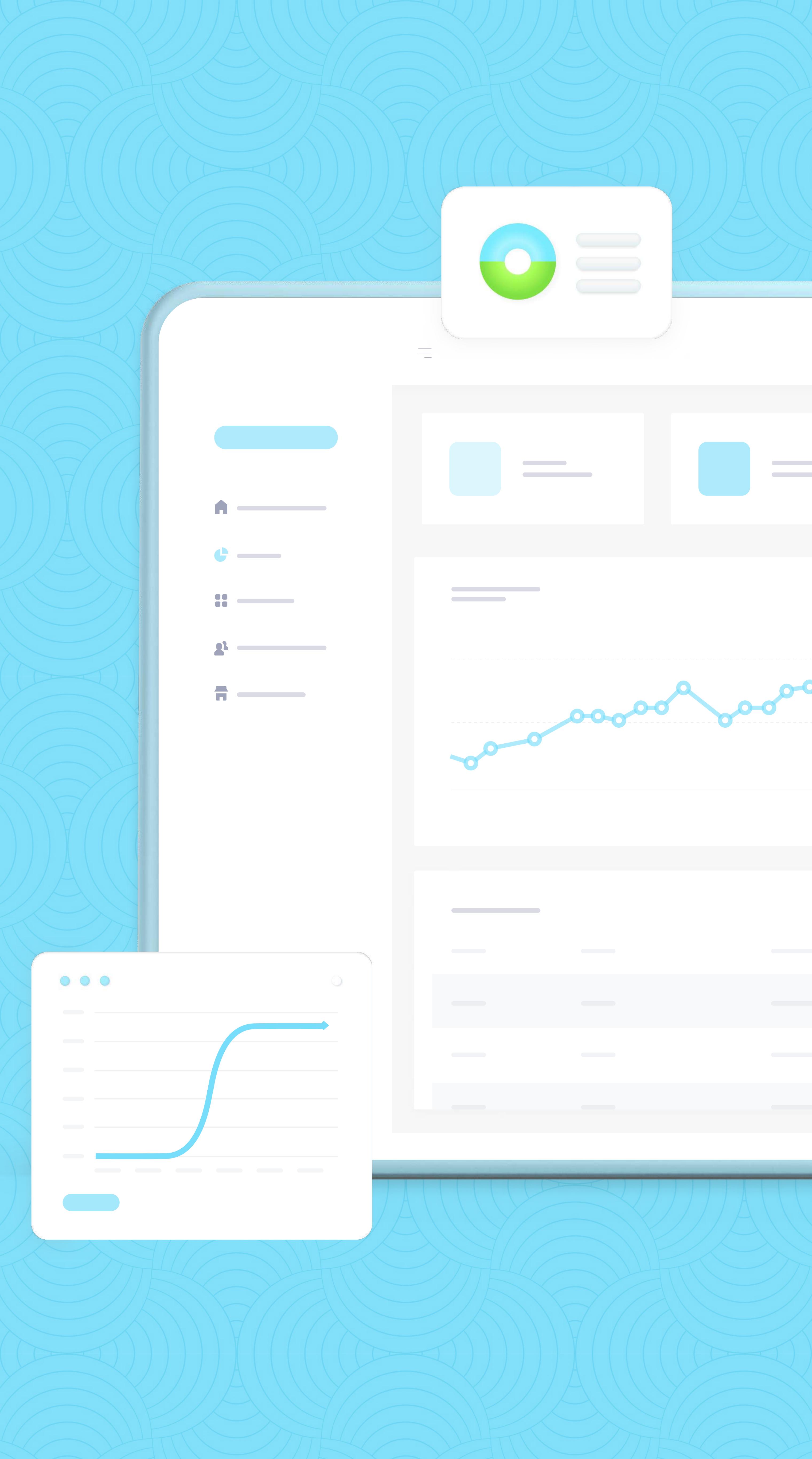
The Android ad network rankings show that both Applovin and ironSource are ranked at #1 in two categories each



Applovin is the #1 monetization channel by ad revenue on both iOS and Android



ironSource & Meta Audience are leading the ad monetization ranking by eCPM for Android and iOS respectively



About Tenjin

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.

[Sign up](#)

01

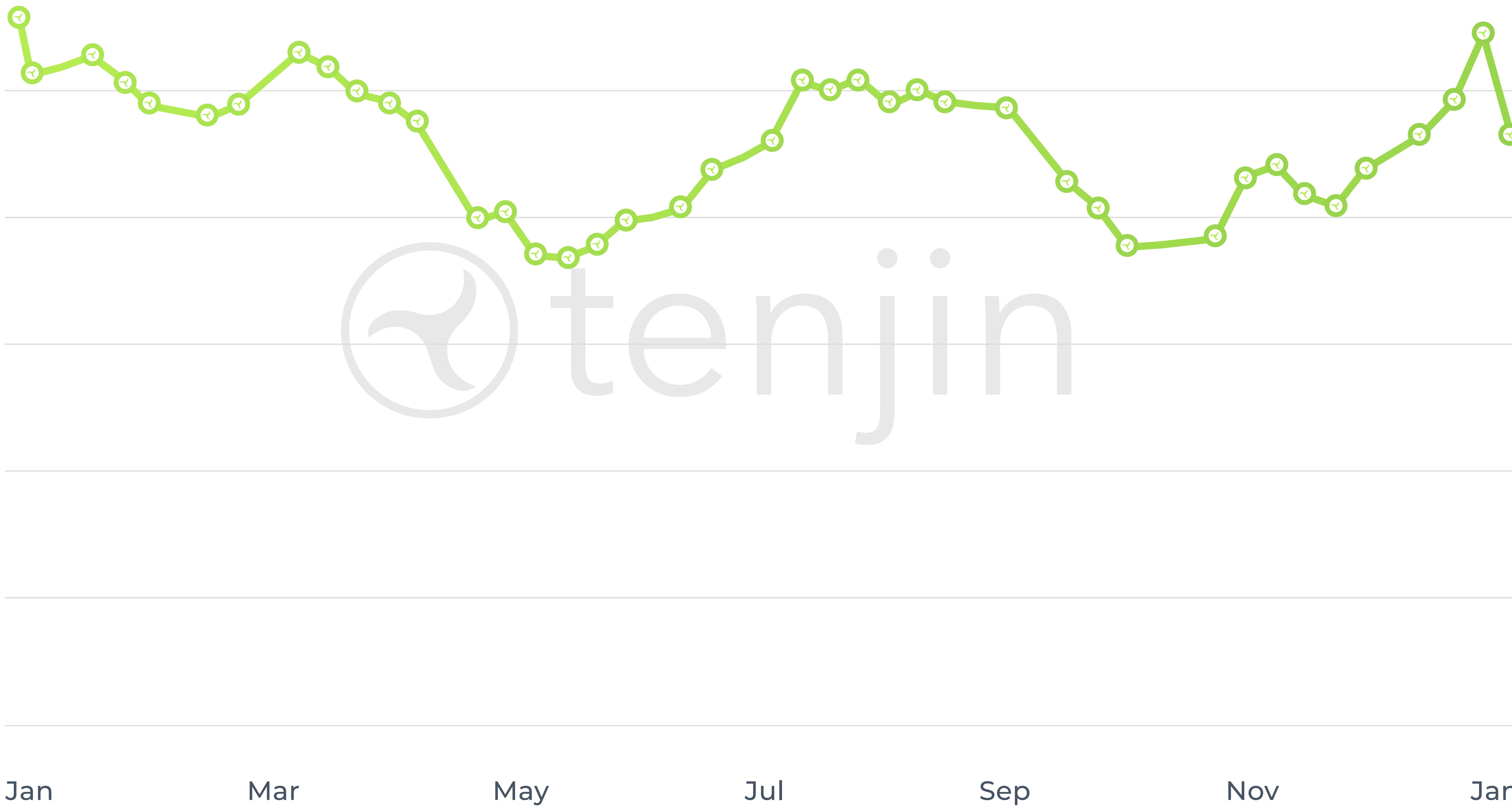
Industry Trends

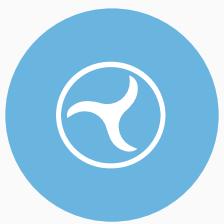




Ad Impressions decreased by 10% throughout 2022

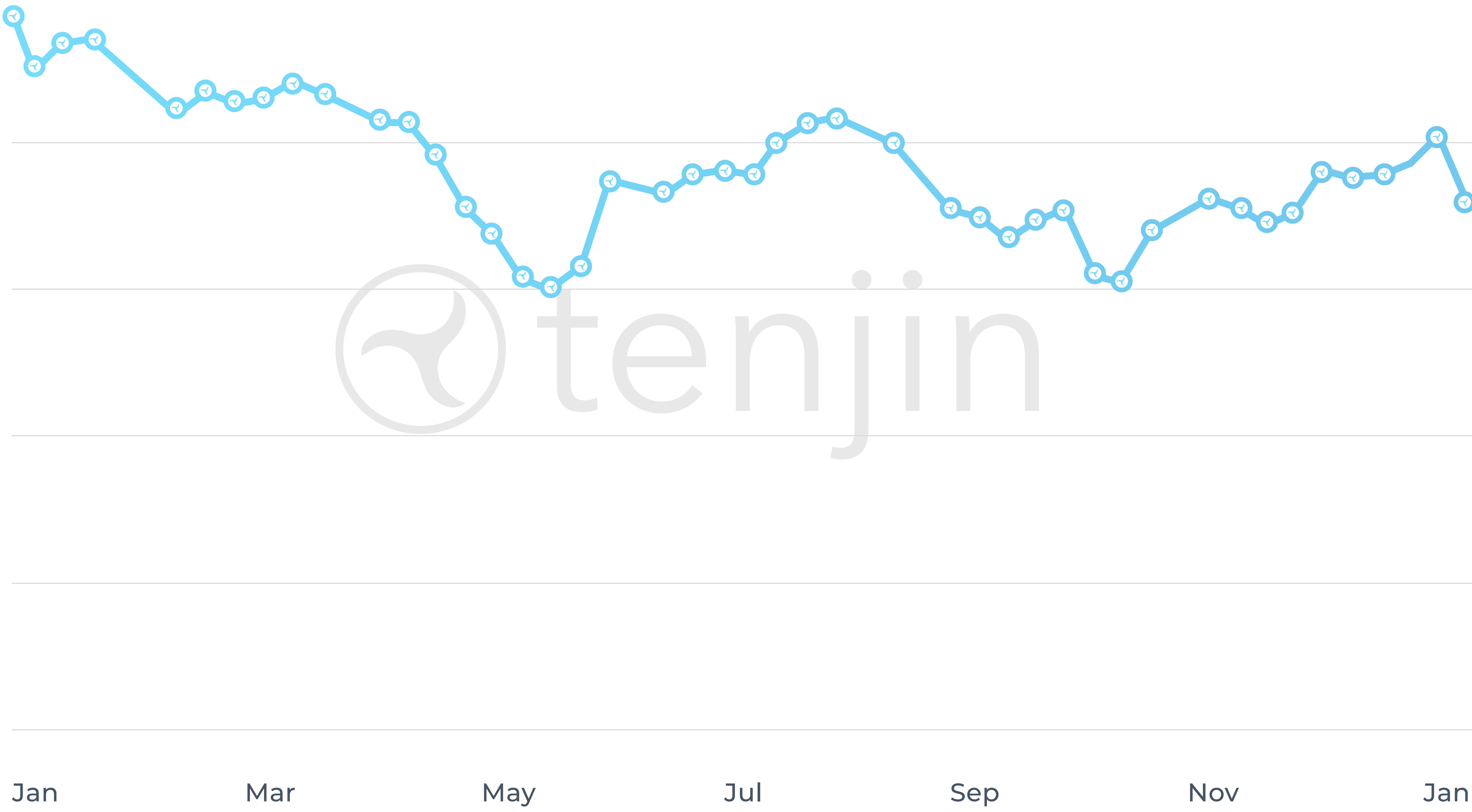
Ad impressions





Ad Impressions decreased by 20% throughout 2022

Ad impressions

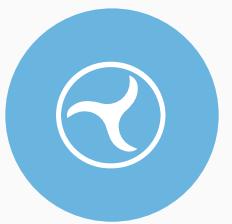




eCPM decreased by 28% throughout 2022

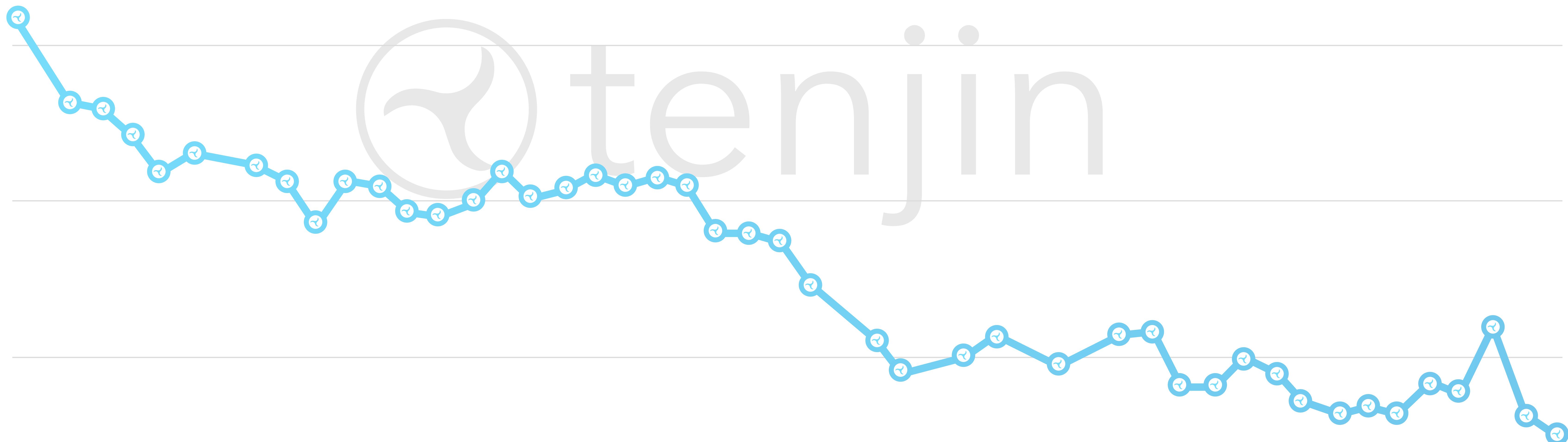
eCPM





eCPM decreased by 35% throughout 2022

eCPM



Jan

Mar

May

Jul

Sep

Nov

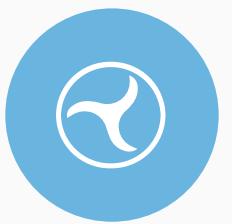
Jan



of IAPs increased by 37% throughout 2022

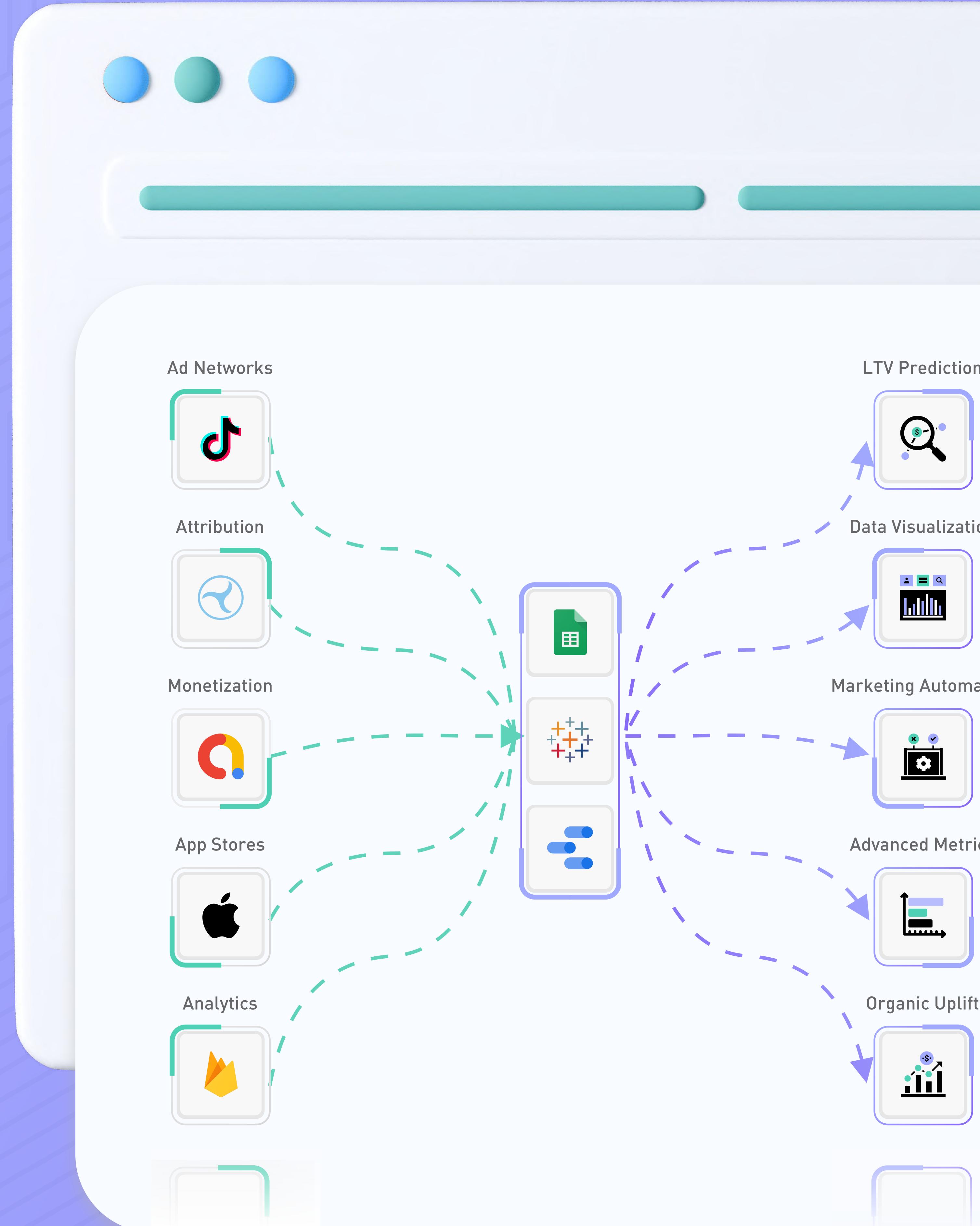
IAPs





of IAPs increased by 34% throughout 2022





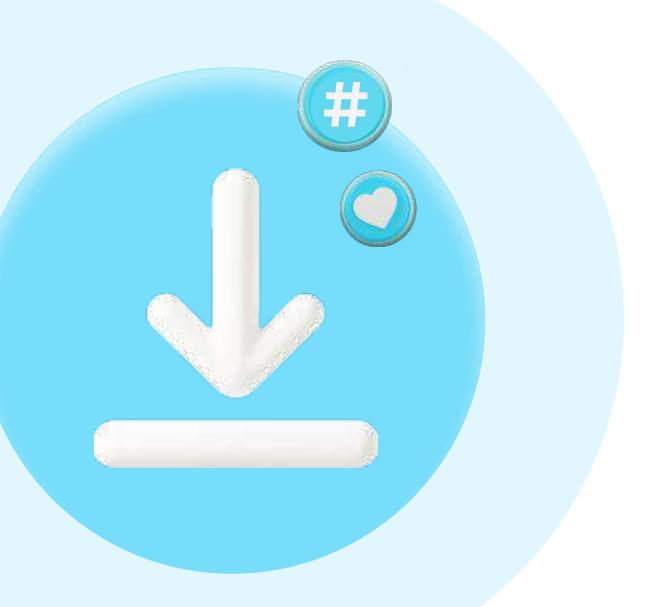
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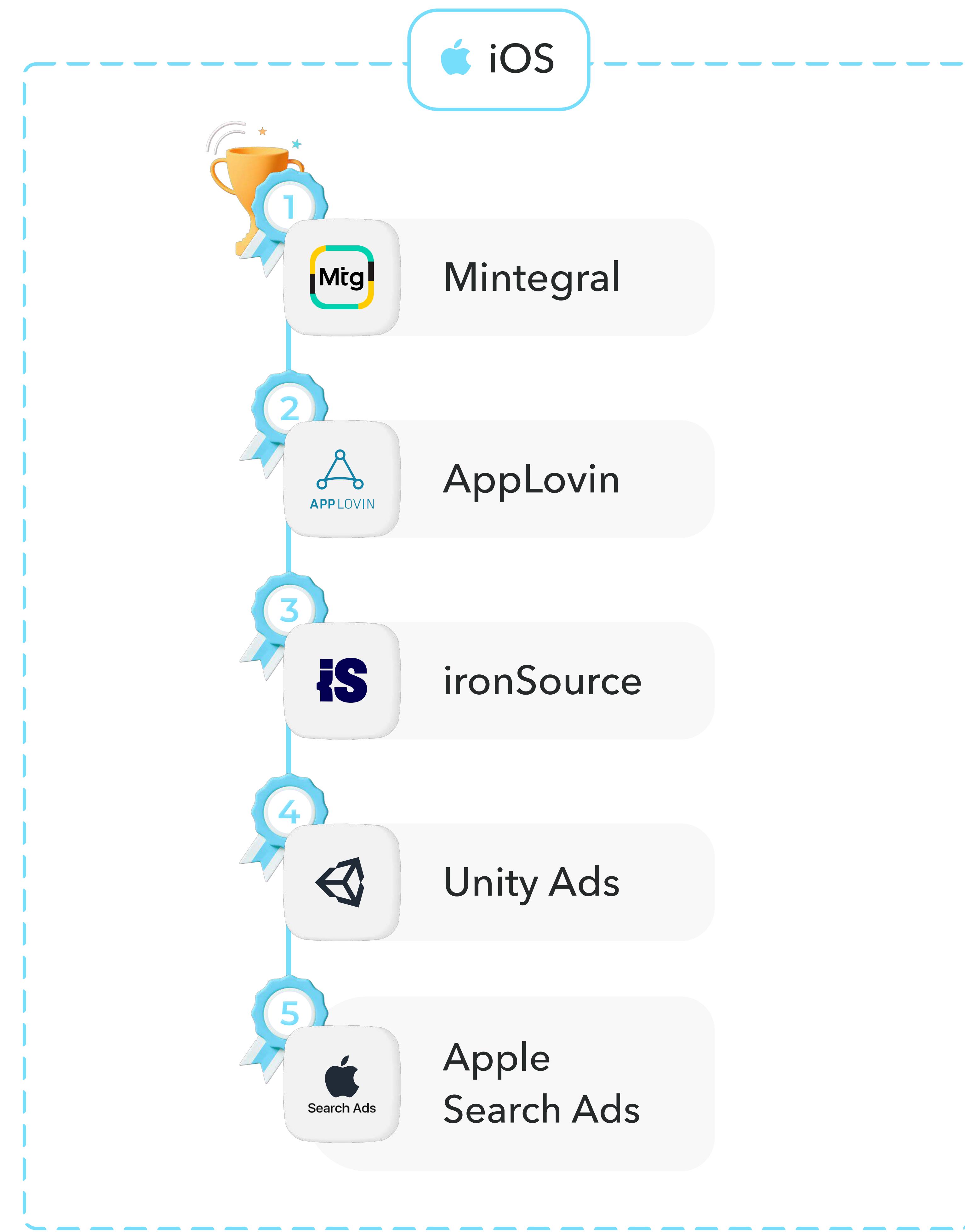
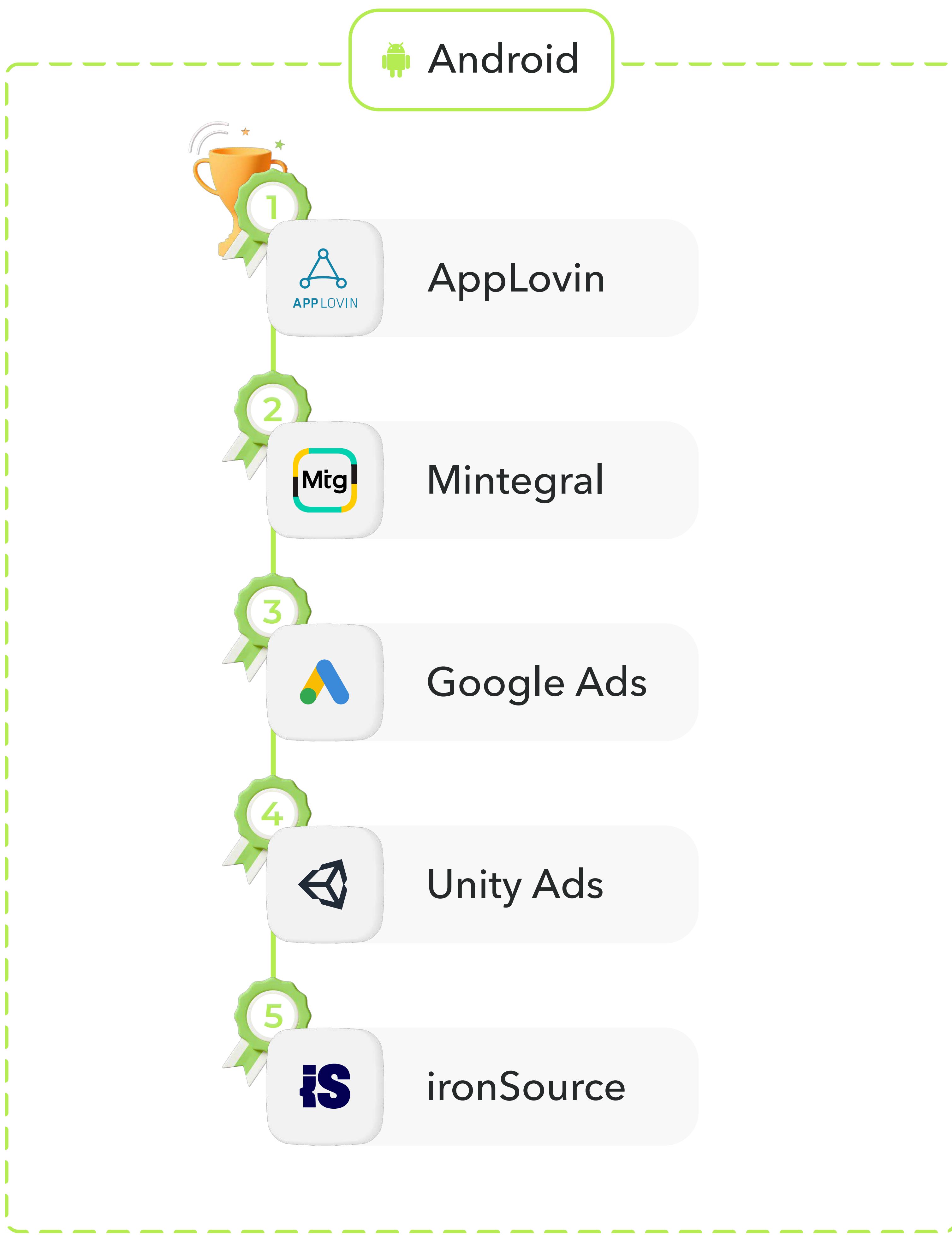
[Learn more](#)

02 Ad Network Rankings





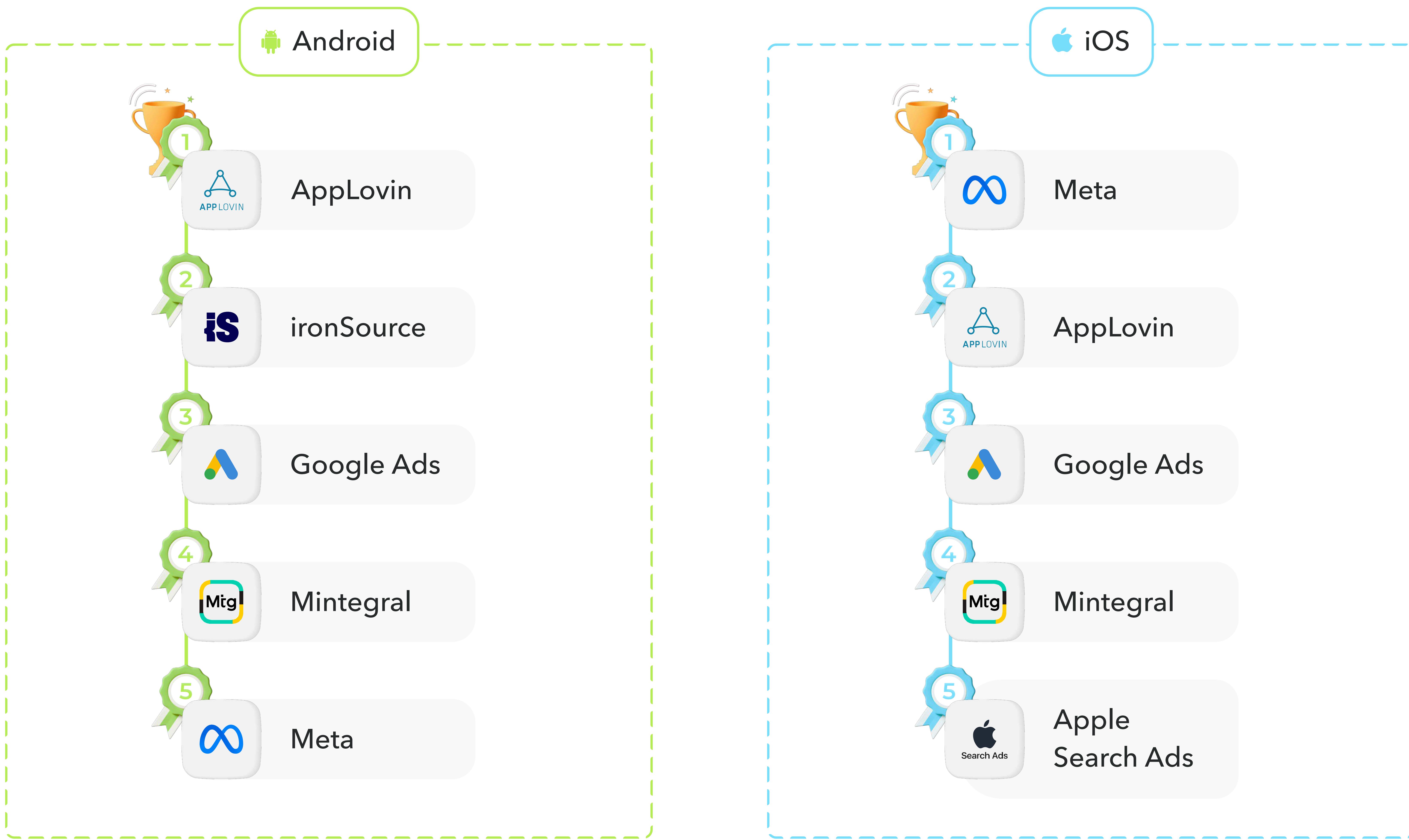
Top 5 Ad Networks in 2022 based on Total Installs



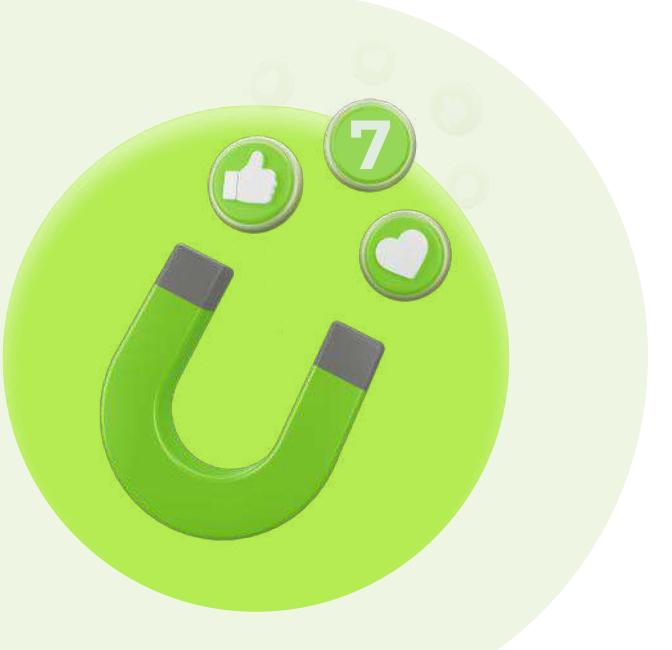
Installs – the download and opening of an app by a user for the first time.



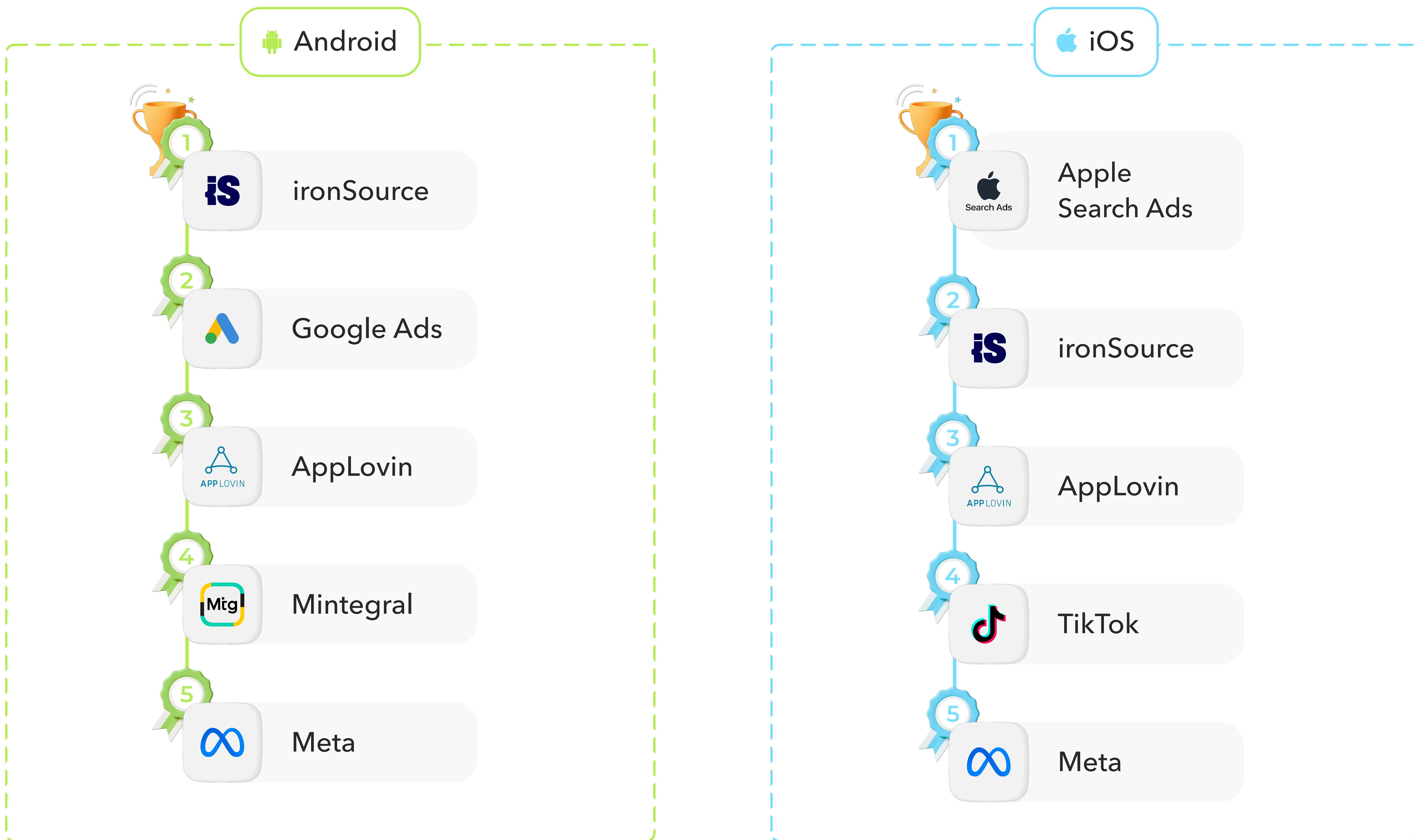
Top 5 Ad Networks in 2022 based on the Highest Average for Day 1 Retention



Day 1 Retention – the cohort of users that came back to the app 24 hours after the install date.



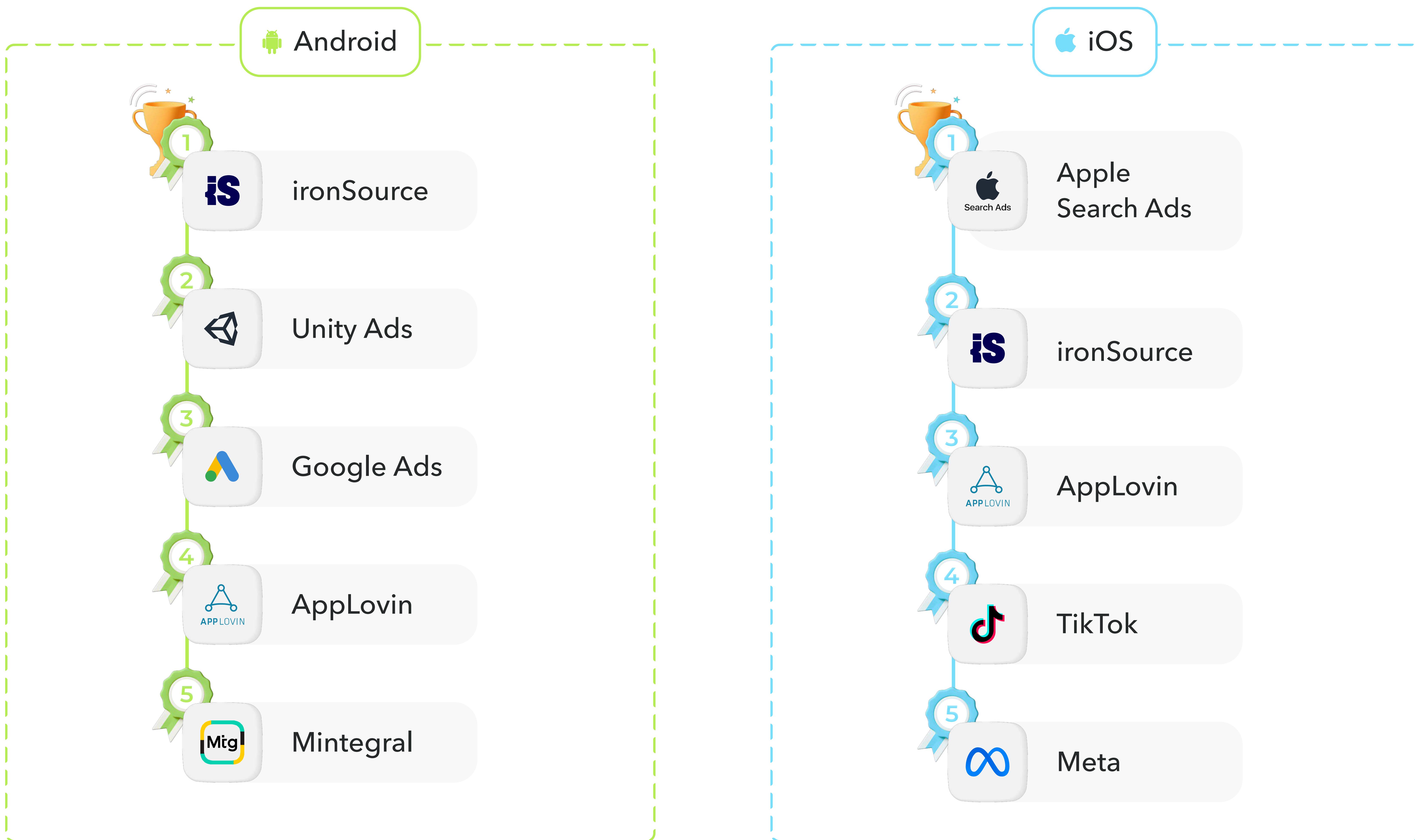
Top 5 Ad Networks in 2022 based on the Highest Average for Day 7 Retention



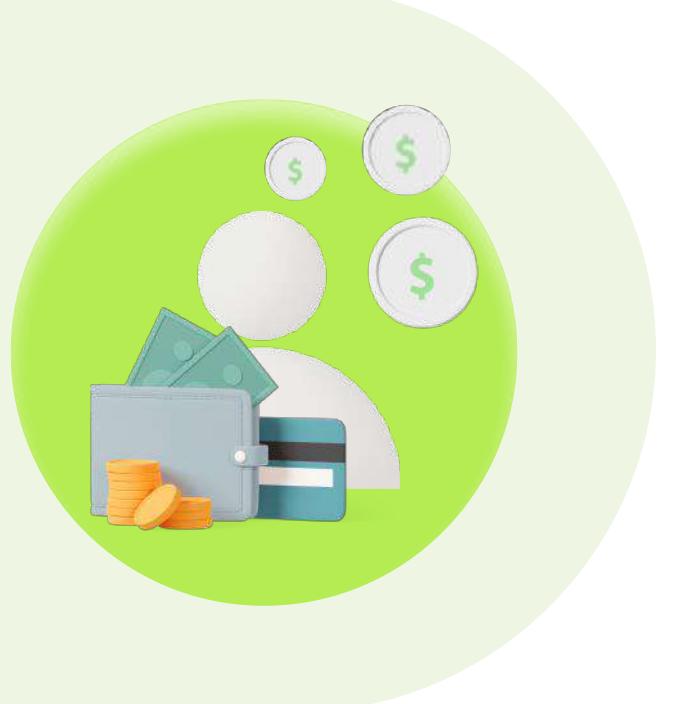
Day 7 Retention - the cohort of users that came back to the app 7 days after the install date.



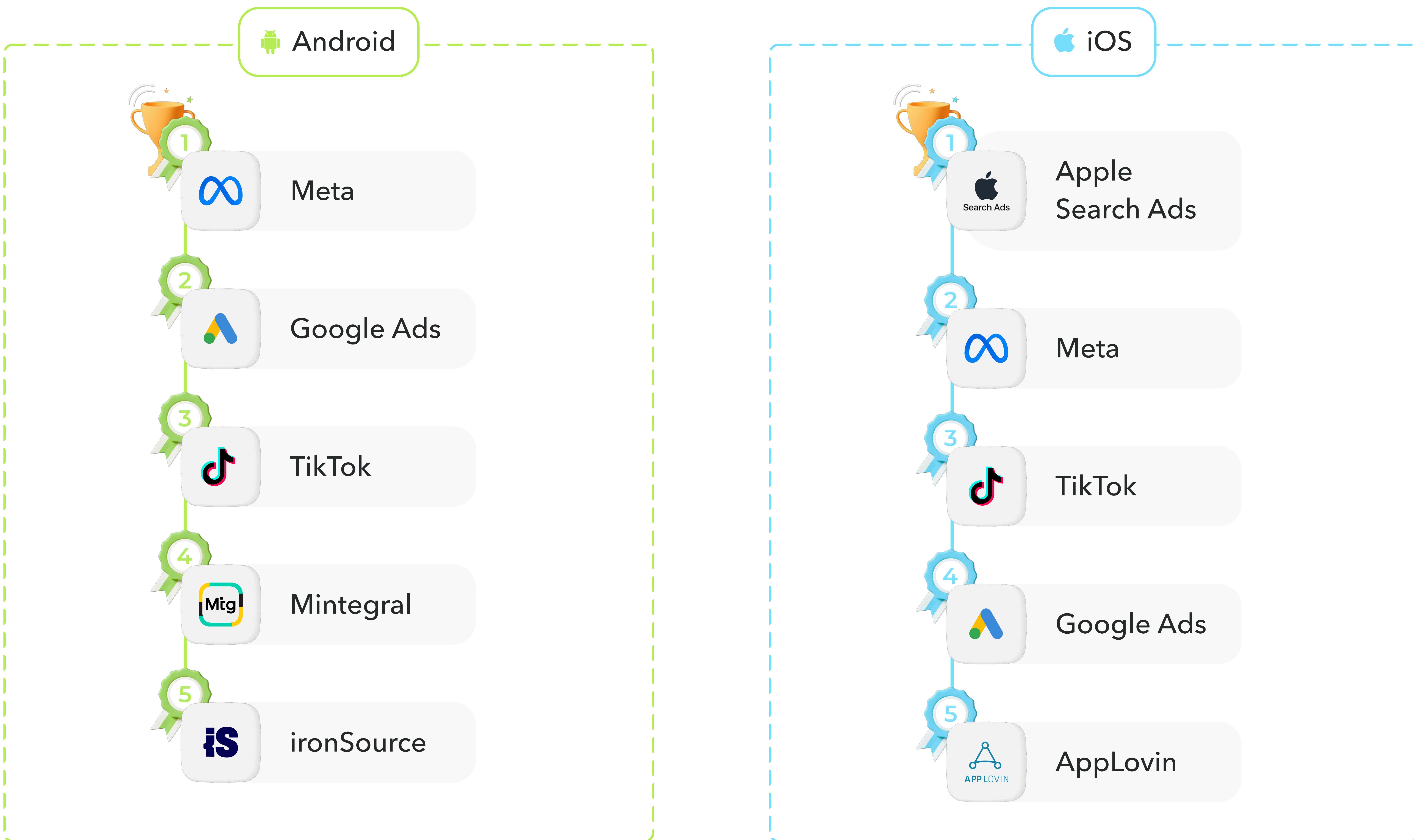
Top 5 Ad Networks in 2022 based on the Highest Average for Day 7 Ad LTV



Day 7 Ad Revenue LTV - the ad revenue earned from the user cohort 7 days after install.



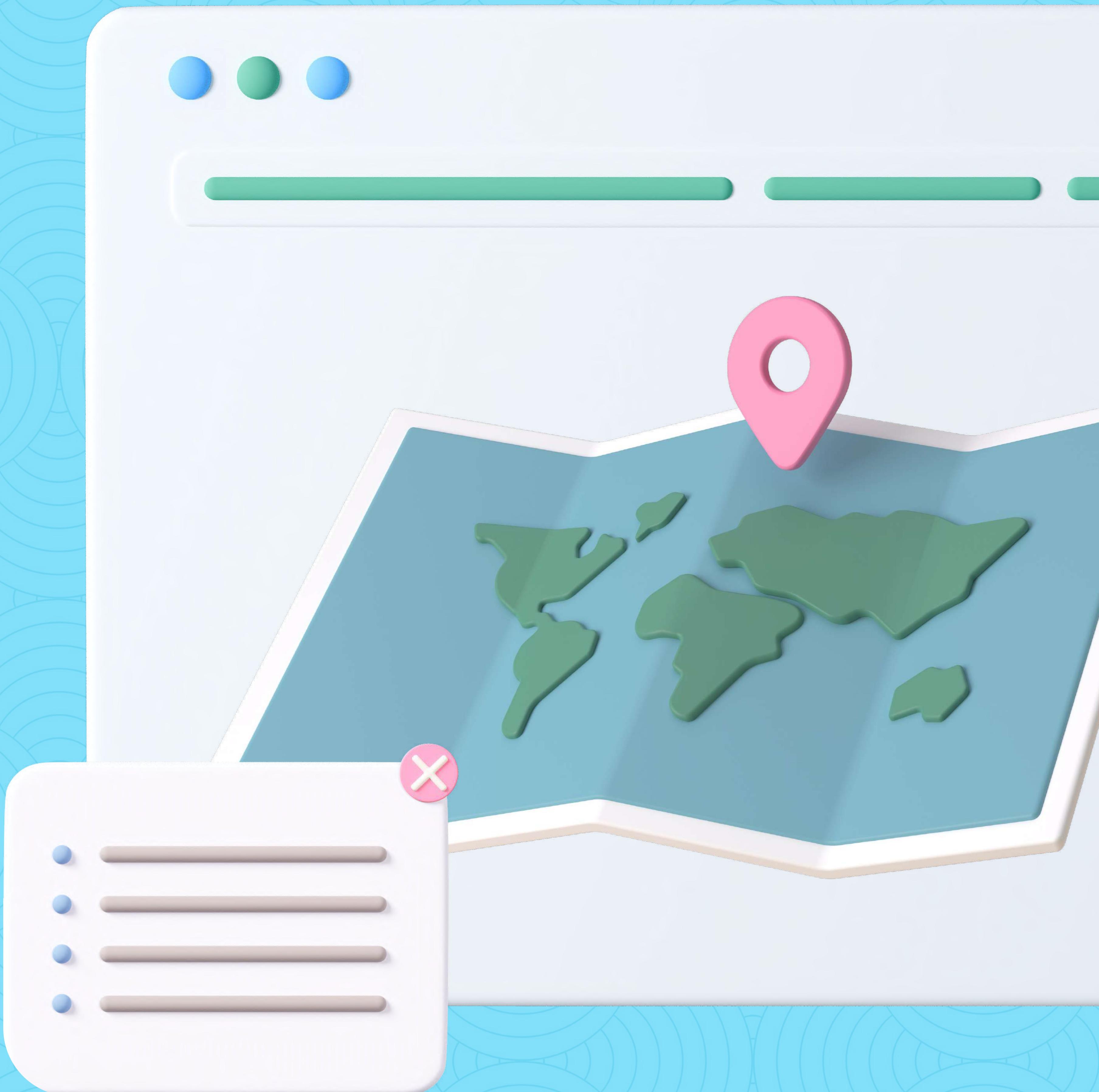
Top 5 Ad Networks in 2022 based on the Highest Average for Day 7 IAP LTV

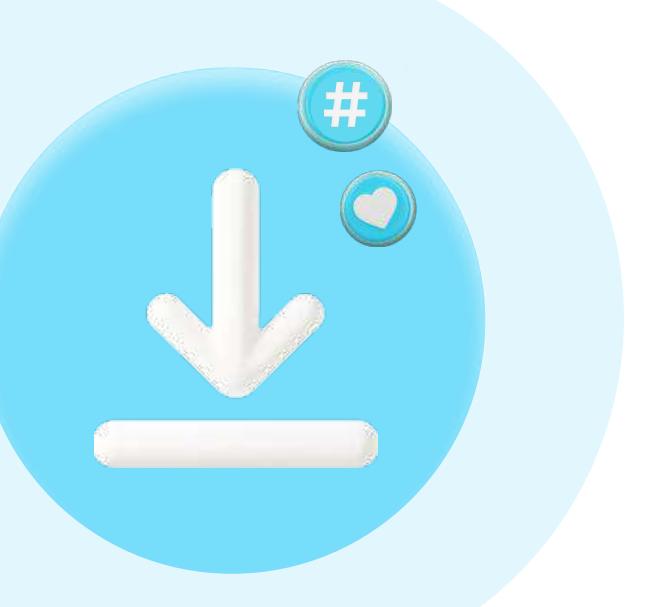


Day 7 IAP LTV - in-app purchase (IAP) revenue earned from the user cohort 7 days after install.

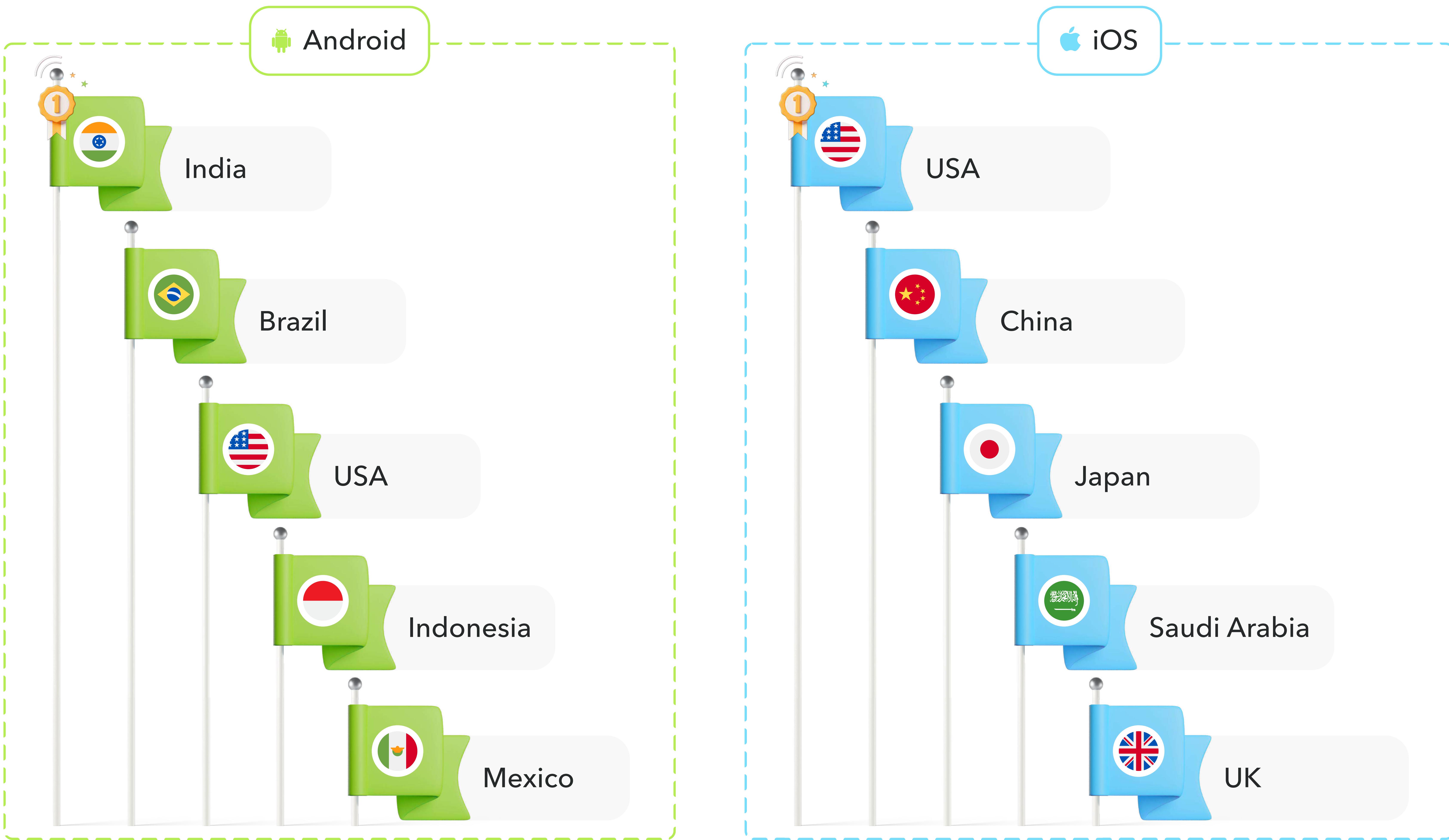
03

Country Rankings

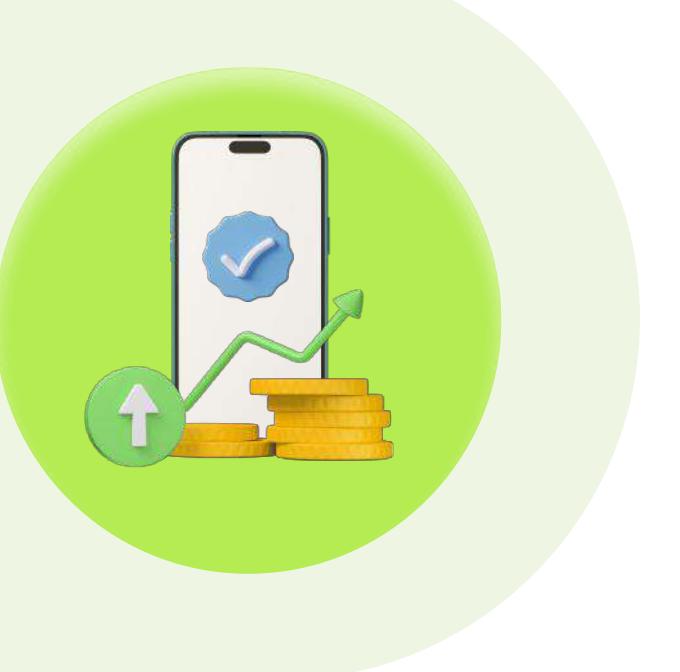




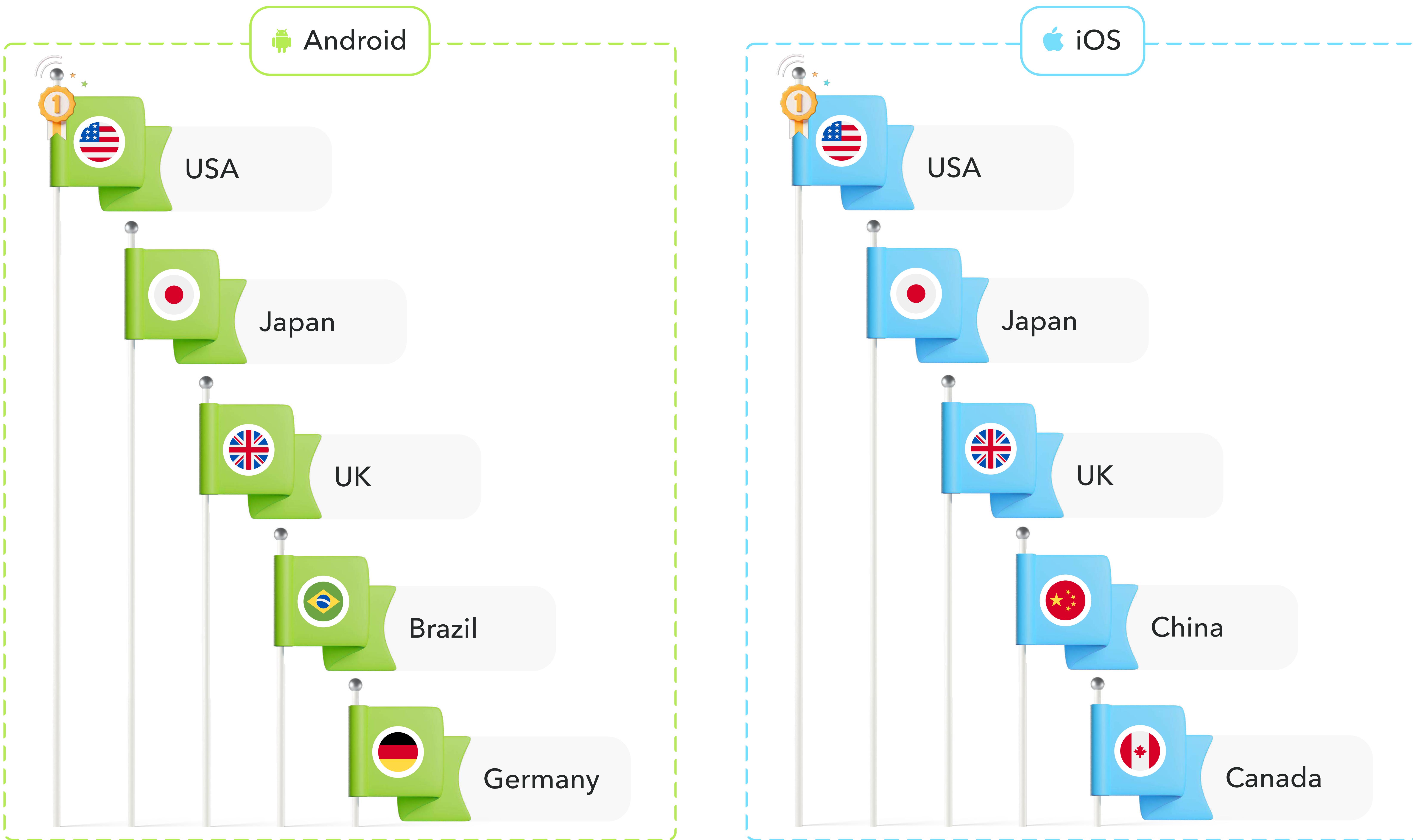
Top 5 Countries in 2022 based on Total Installs



Installs – the download and opening of an app by a user for the first time.



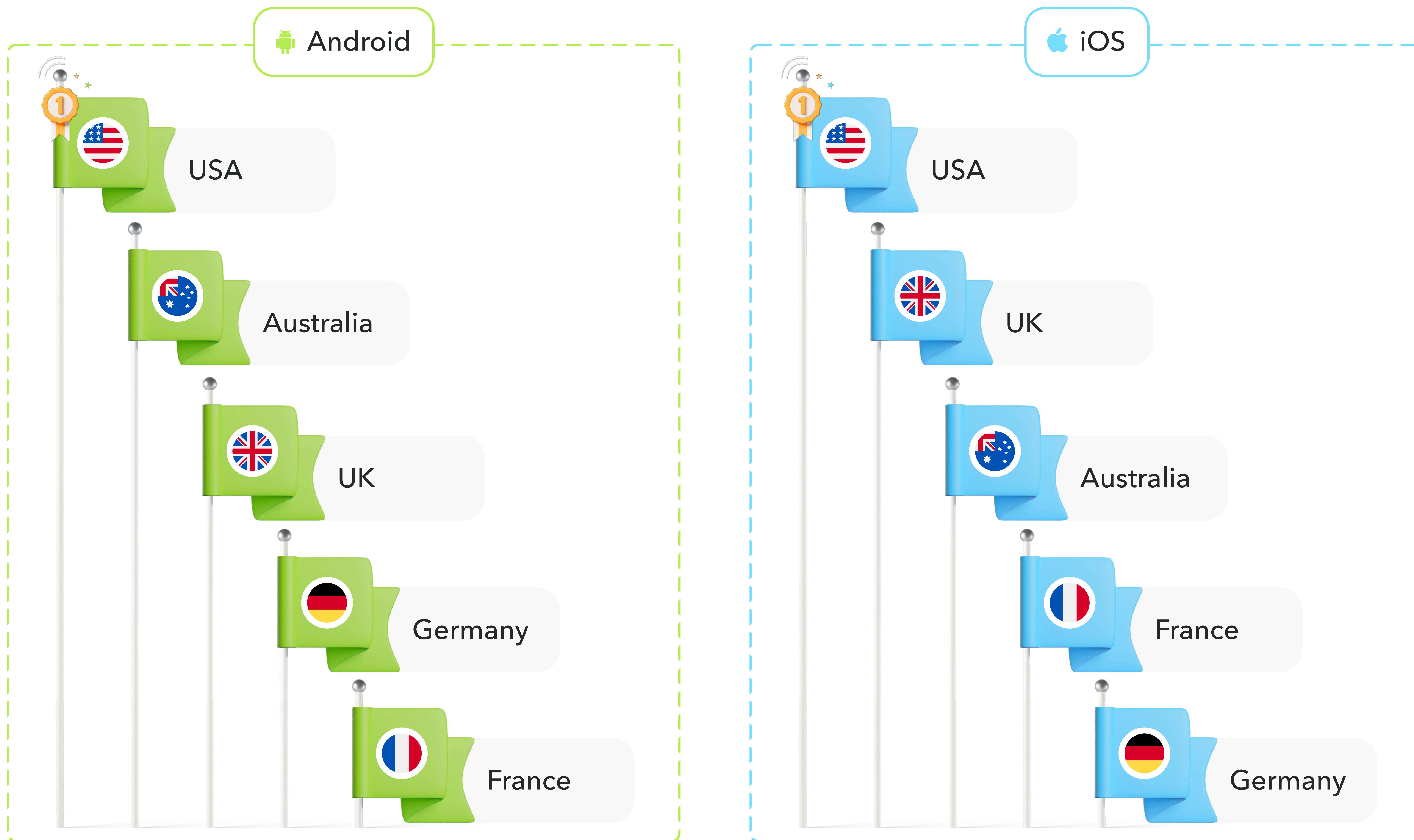
Top 5 Countries in 2022 based on Total Ad Revenue



Total ad revenue - the sum of all accumulated revenue generated via in-app advertising.



Top 5 Countries in 2022 based on Total IAP Revenue



Total IAP revenue - the sum of all accumulated revenue generated via in-app purchases.

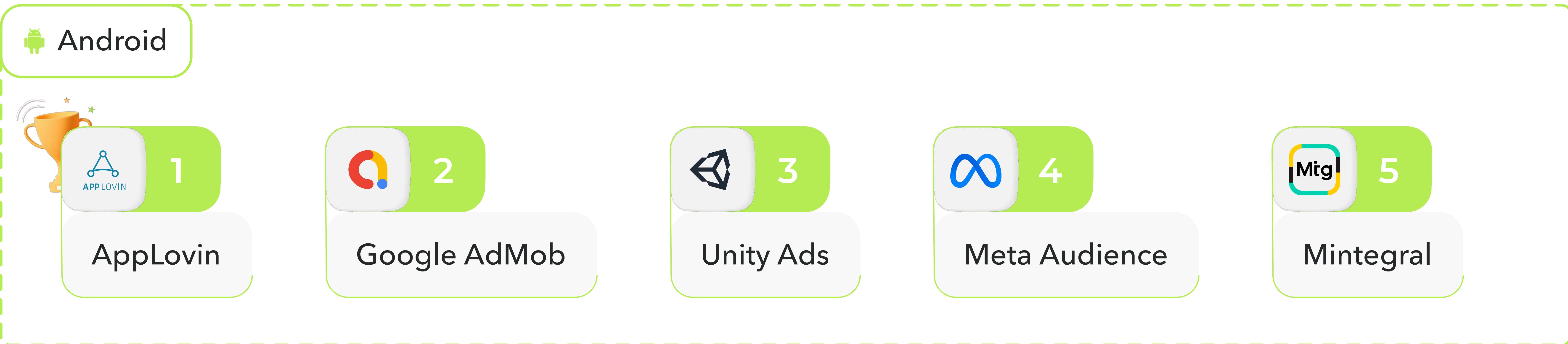
04

Ad Monetization Channel Rankings

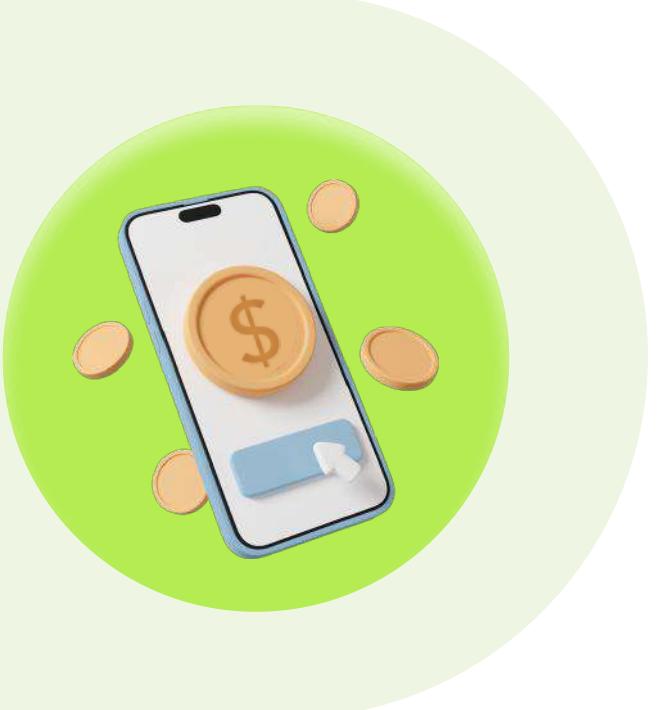




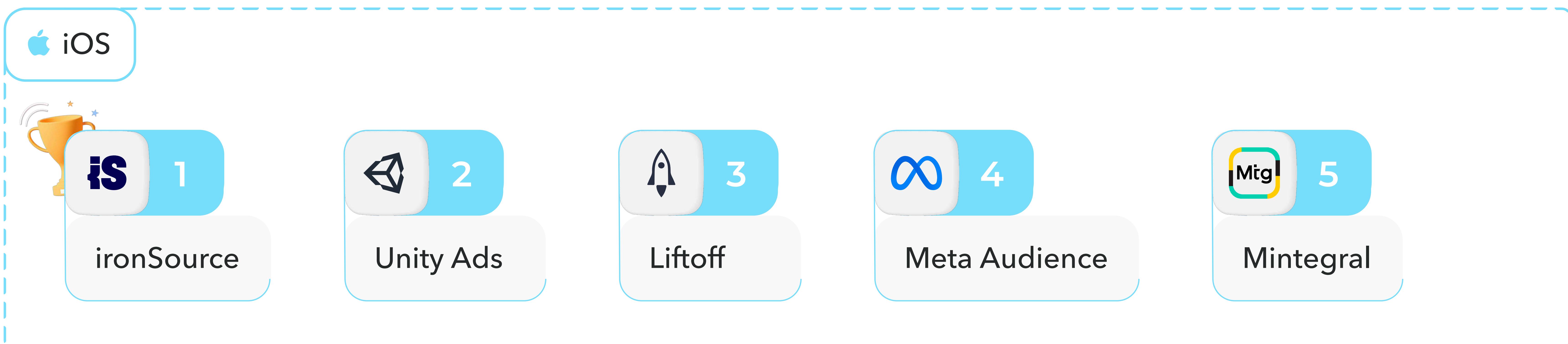
Top 5 Ad Monetization Channels in 2022 based on Total Ad Revenue

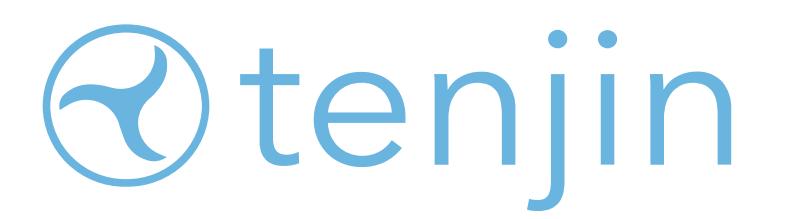


Total ad revenue - the sum of all accumulated revenue generated via in-app advertising.



Top 5 Ad Monetization Channels in 2022 based on the Highest Average eCPM





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Methodology

The benchmark report consists of anonymized data collected by Tenjin in the date range of 01.01.2022 - 31.12.2022.

The rankings only include ad networks and countries that surpassed the threshold of 25 millions installs.

The weighted average method was used to determine the rankings for Day 1 retention, Day 7 retention, Day 7 ad revenue LTV, Day 7 IAP LTV, and eCPM.

