

# The Truth About Hyper-Casual



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# The big questions:

# How big is it?

How big is it?

There are around **100m** game  
installs a day

How big is it?

**The top 30 games generate 13%  
of total installs = 13m**

How big is it?

**Hyper-casual is 62% of the top  
30 games by number of  
downloads = 8m/day**

How big is it?

**Overall, hyper-casual generates  
~22m installs/day**

**Taking LTV into account, our  
formula estimates this =  
\$2-\$2.5b in annual revenue**

# How fast has it grown?

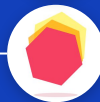


## How fast has it grown?

Information taken from App Annie

### September 2016 US

#	Free App Downloads	
1	Flip Driving Miniclip	3,513,495
2	Pokemon GO Niantic	2,940,791
3	Rolling Sky Cheetah Mobile	2,816,307
4	Sixt Glam Games	2,729,636
5	sithario Lovetech Studios	1,949,468
6	Bottle Flip 2K16	1,884,235
7	Color Switch	1,782,236
8	Wheel of Fortune Play Scopely	1,781,545
9	My NBA 2K17 2K Games	1,518,541
10	ROBLOX Roblox	1,490,139
11	Subway Surfers Kiloo	1,447,103
12	Mobile Strike Epic War	1,333,141
13	Talking Tom Gold Run Outfit7	1,319,185
14	Animation Throwdown Kongregate	1,267,236
15	Clash Royale Supercell	1,249,463
16	8 Ball Pool Miniclip	1,209,608
17	Fit The Fat 2 Five Bits	1,185,352
18	Toy Blast Peak Games	1,174,542
19	Gardenscapes - New Acres Playrix	1,174,466
20	Piano Tiles 2 Cheetah Mobile	1,128,671



HC are 25% of top 20 free games

### September 2017 US

#	Free App Downloads	
1	Flip Master Miniclip	3,759,603
2	Bah V5 Blocks Voodoo	2,798,005
3	Bowmasters Playgendary	1,830,371
4	Homescapes Playrix	1,778,264
5	Word Connect by Zepoy Zepoy	1,772,540
6	My NBA 2K18	1,676,185
7	ROBLOX Roblox	1,545,482
8	Super Mario Run Nintendo	1,377,512
9	Subway Surfers Kiloo	1,308,516
10	Final Fantasy XV: A New Empire Epic Action	1,208,731
11	Stack Ketchapp Studio	1,130,894
12	8 Ball Pool Miniclip	1,104,881
13	Rider Ketchapp Studio	1,096,501
14	Word Cookies! Bilmango	1,092,861
15	Playgy Dunk Voodoo	1,082,590
16	Angry Birds Match Rovio	1,054,356
17	Book Gang Vivagill	1,046,310
18	Design Home Crowstar	1,018,269
19	Roll the Ball - slide puzzle Bilmango	995,544
20	Golf Clash Playrix	995,910



HC are 20% of top 20 free games

### September 2018 US

#	Free App Downloads	
1	Happy Glass Lun Studios	13,724,428
2	Hello Stars Edstone	5,924,966
3	Merge Plane Voodoo	3,587,918
4	Helix Jump Voodoo	3,330,733
5	Big Big Baller Lun Studios	3,102,188
6	Word Link Woozle	3,061,824
7	Hole.io Voodoo	2,879,407
8	Paper.io 2 Voodoo	2,768,384
9	Go Pahl Koolhae	2,457,404
10	Fortnite Epic Entertainment	2,280,413
11	Bomb of the Mask Playgendary	2,189,799
12	Wordscapes PeopleFun	1,918,471
13	Snake VS. Colors at Tethrae	1,902,548
14	Lucky Day Lucky Day	1,883,148
15	PUBG MOBILE Tencent	1,868,643
16	ROBLOX Roblox	1,789,947
17	Rise Up Sanku Cityline	1,693,326
18	Toon Blast Peak Games	1,677,038
19	Bumper.io Voodoo	1,491,578
20	TENKYU Voodoo	1,428,904



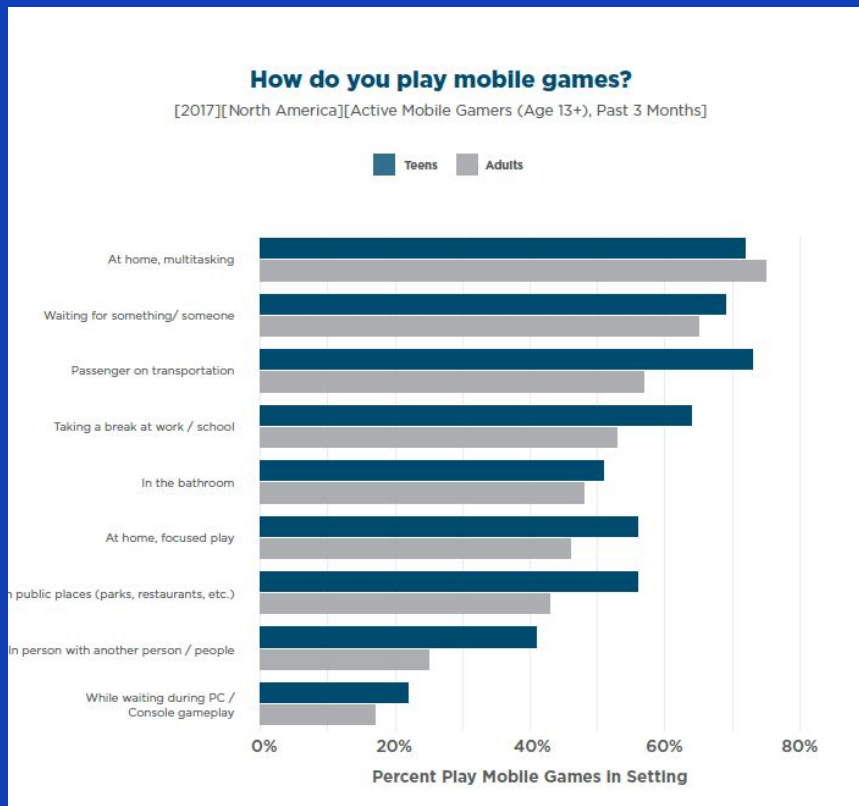
HC are 60% of top 20 free games

# What changed?

What changed?

EEDAR Report:  
Deconstructing Mobile  
& Tablet Gaming 2017

Users increasingly look for **low-commitment** entertainment to be enjoyed in **short bursts** of time in between or **while carrying out** other activities

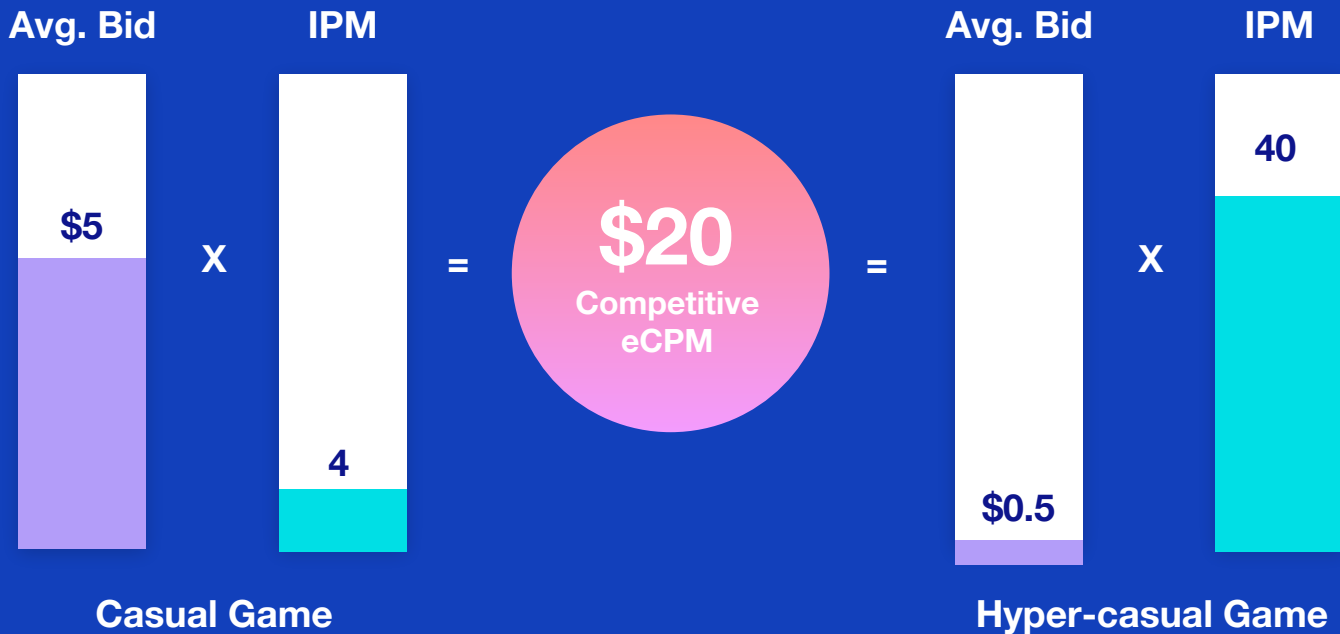


What changed?

# Hyper-casual games cracked ROI positive UA at scale

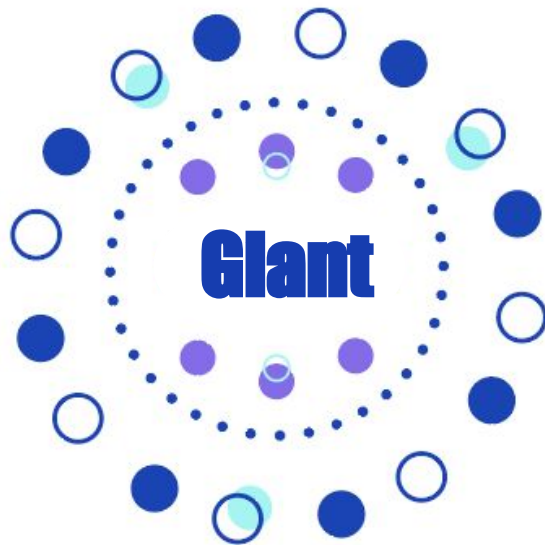
What changed?

Creative capabilities and IPM were key in making this possible



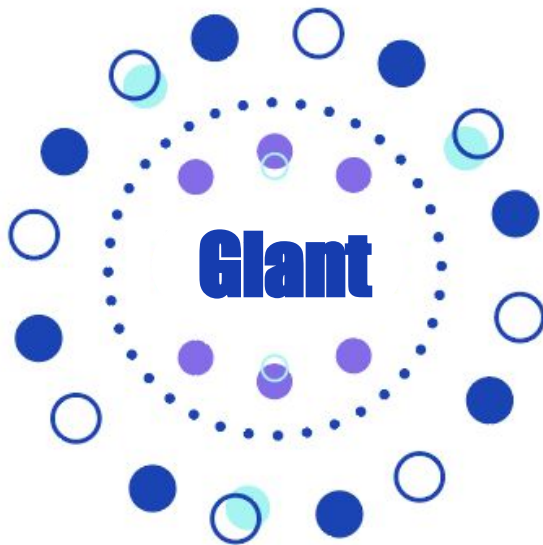
# Has hyper-casual grown the in-app/in-game ad market?

## Available pool of in-game ad inventory - BEFORE



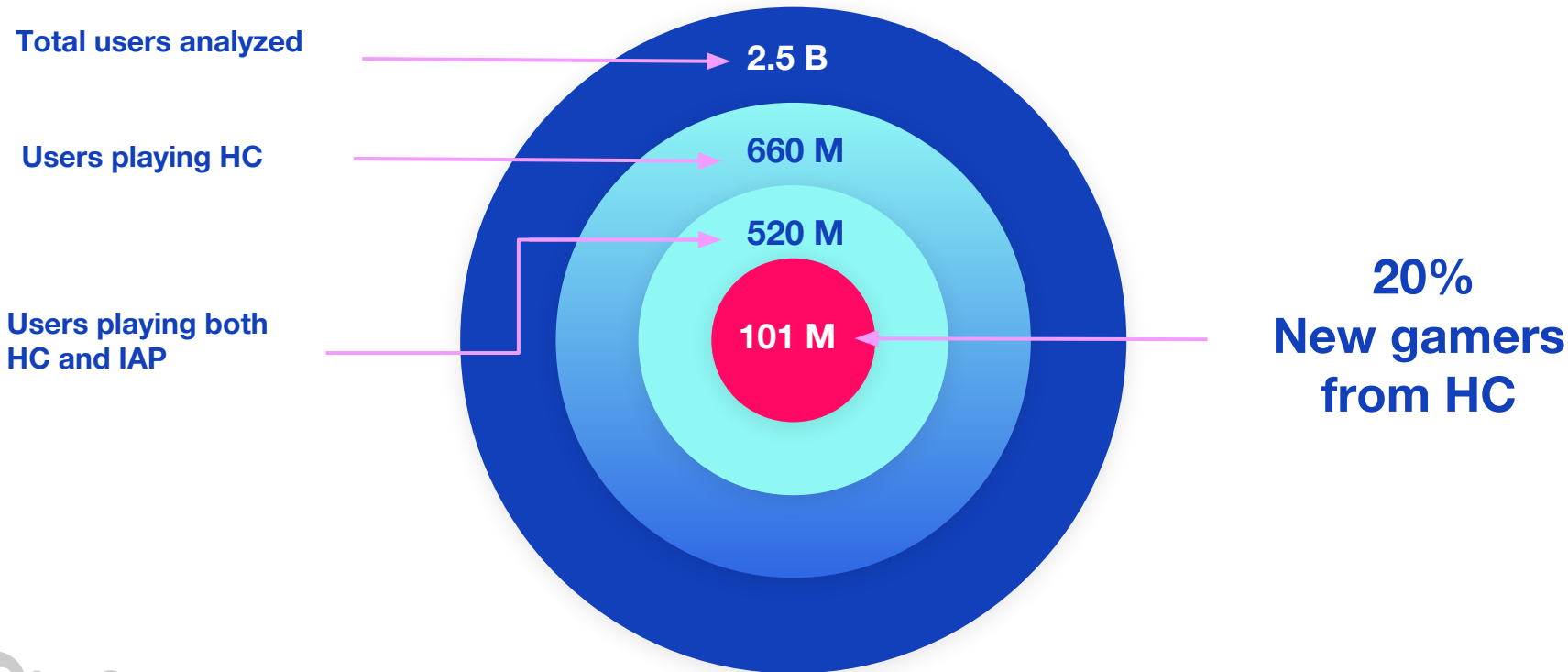
Market size

## Available pool of in-game ad inventory - AFTER



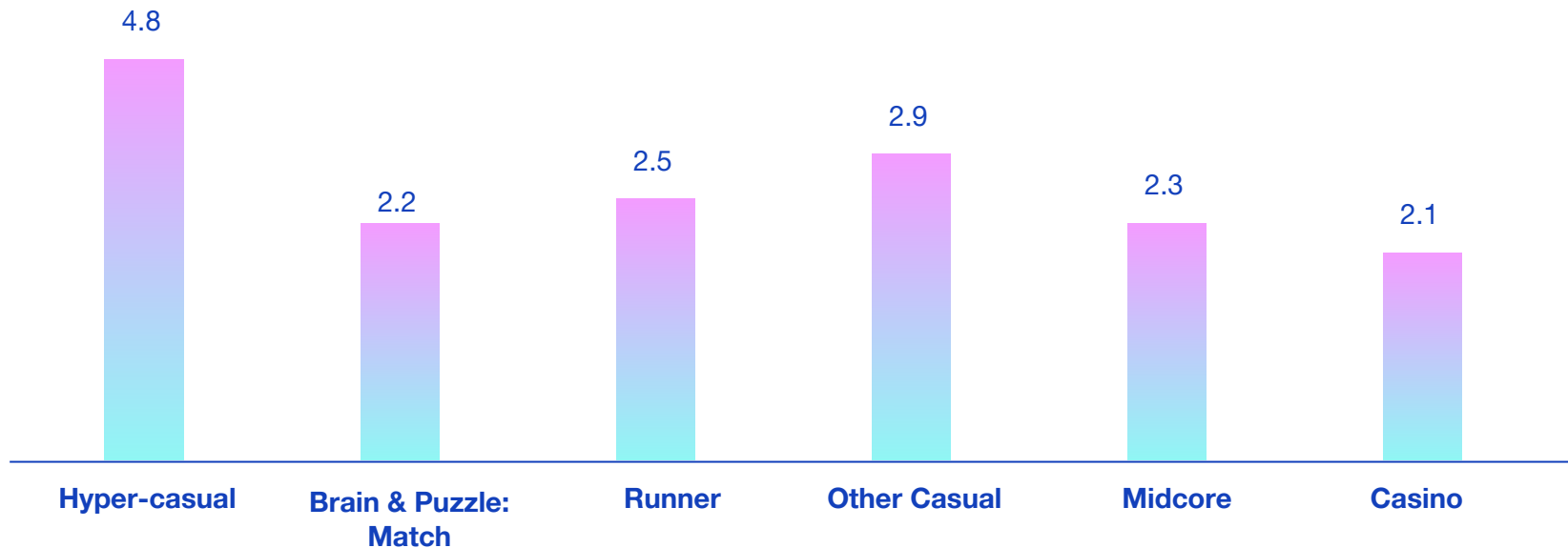


## Growing the gaming market - new gamers are born

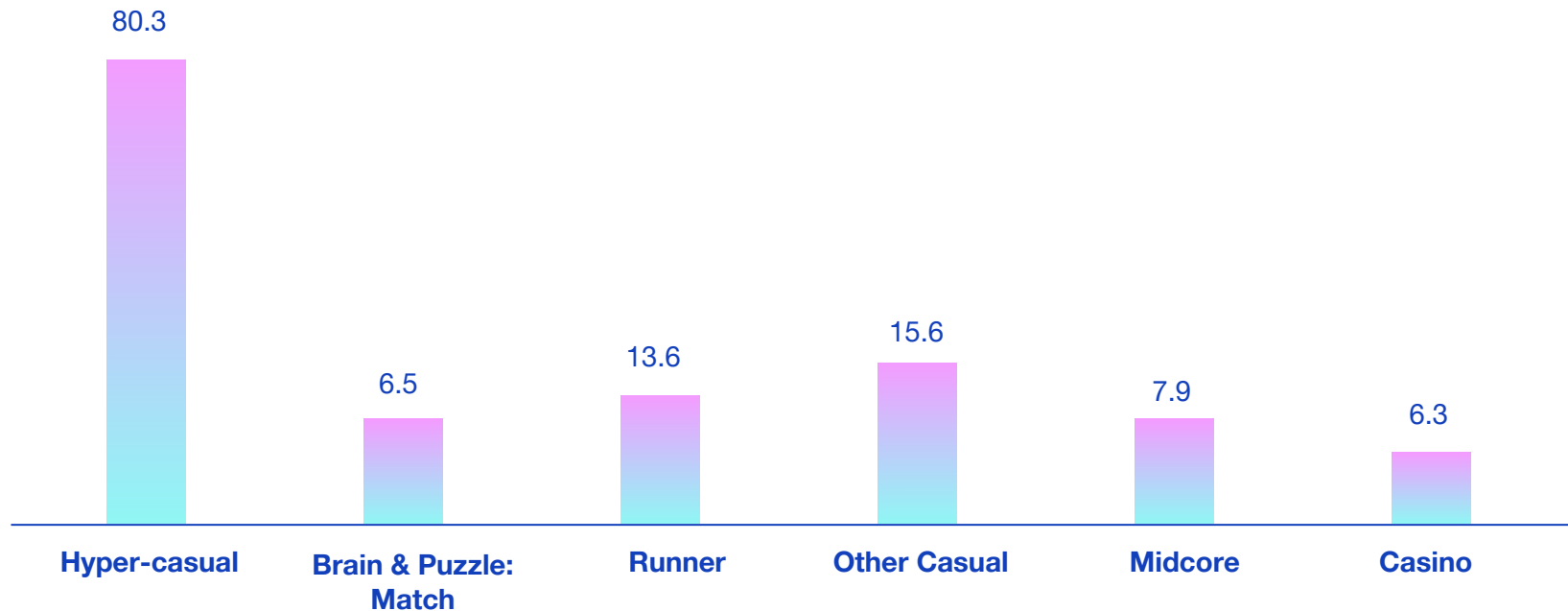


# What's the quality of the new inventory ?

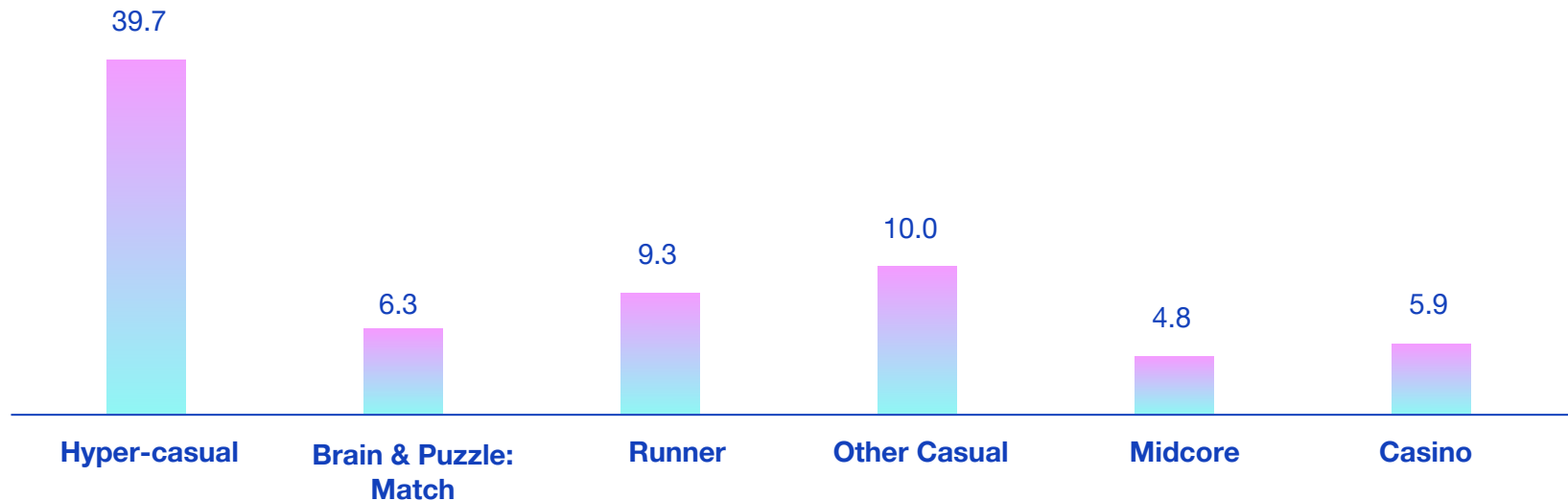
## Hyper-casual users see 2x more video ads (per DAU)



## Hyper-casual users install 10x more apps in all categories (per 1000 DAU)



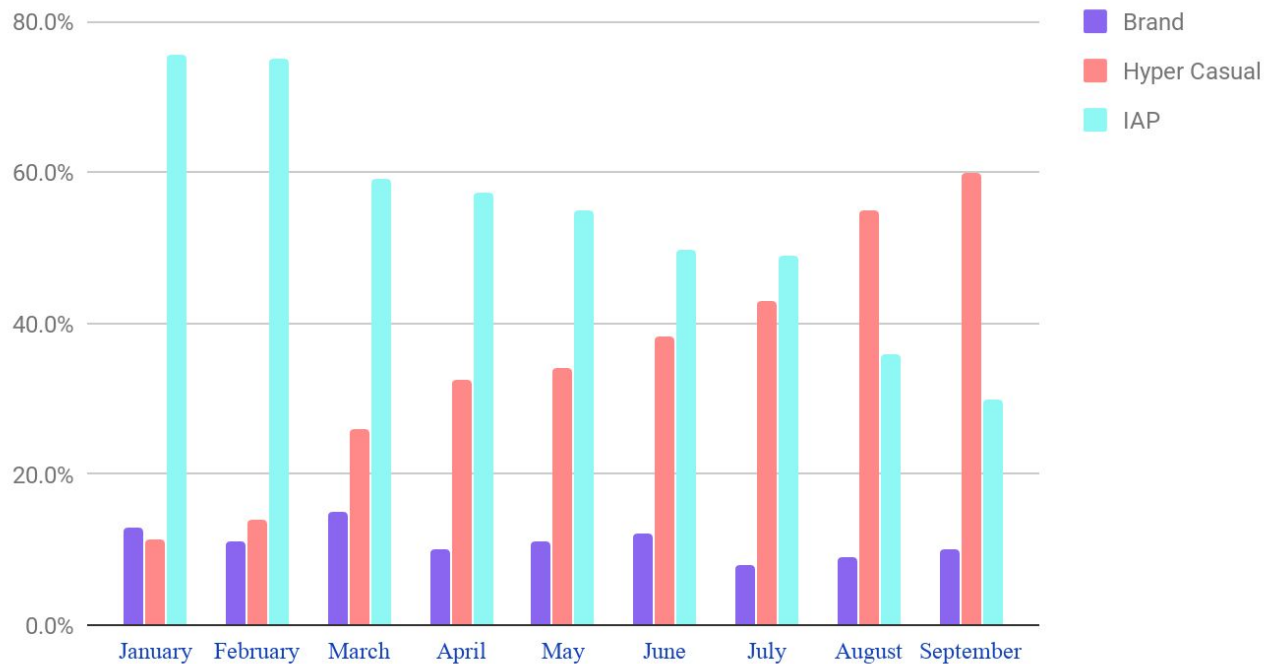
## Hyper-casual users install 5x more apps for IAP titles



# Who's benefiting from the market growth?

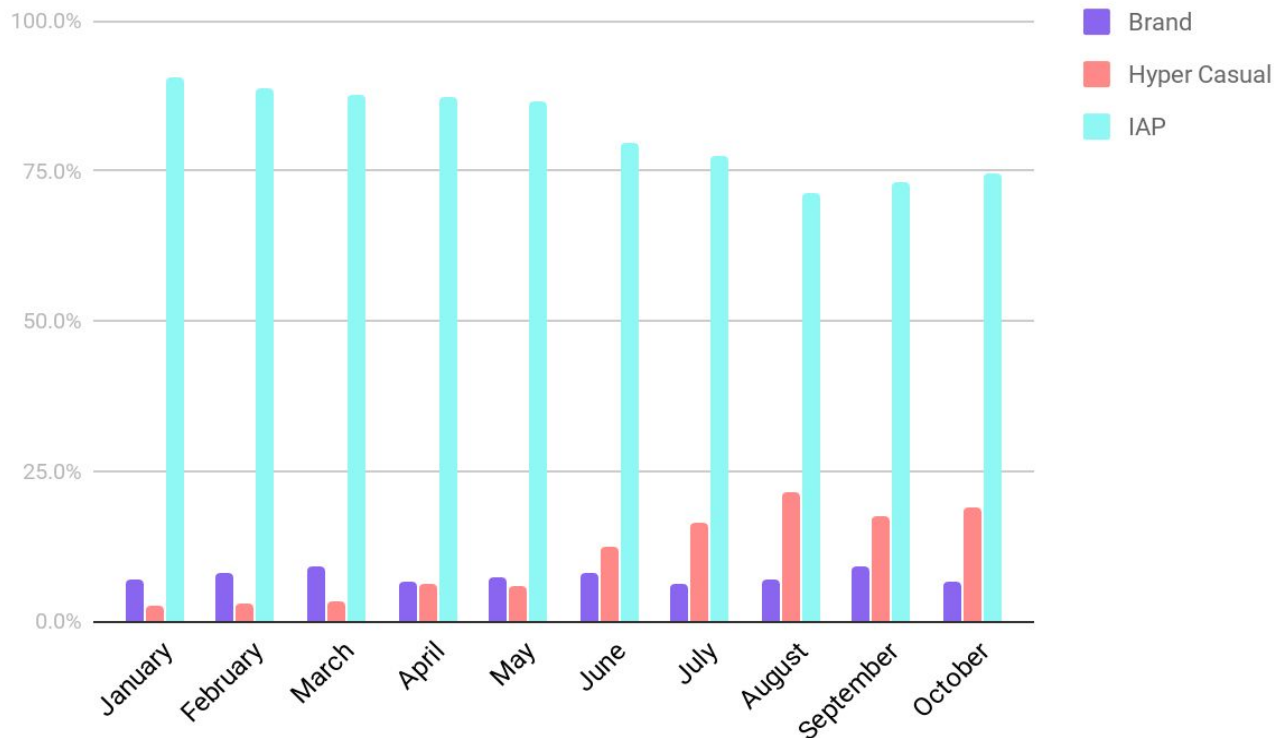
Who's benefiting?

## Advertiser breakdown on hyper-casual supply



Who's benefiting?

## Advertiser breakdown on non hyper-casual supply





# Will hyper-casual be the hot topic at Gamefest 2019?



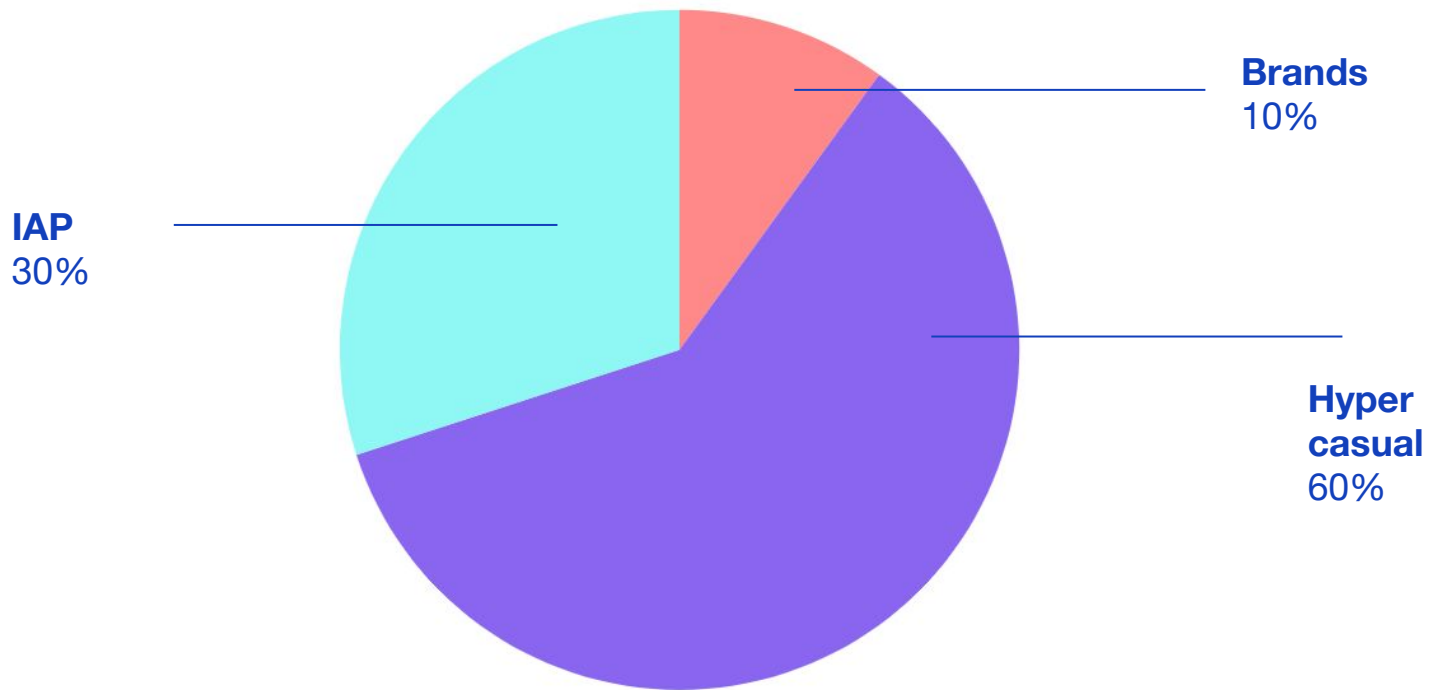
Gamefest 2019

Will hyper-casual be the hot topic at Gamefest 2019?

**Hyper-casual games can't exist in a vacuum. They only exist if there are enough IAP-based games or brand advertisers funding the process.**

September 18 breakdown

## Keeping the balance of advertisers' share of voice on hyper-casual supply



## Keys for market sustainability

1. IAP and brands buying more HC available inventory by using the right methods
2. HC improving their LTV by better ad monetization
3. HC generating revenue also from IAP and subscription models

The background is a solid blue color. It features several abstract geometric elements: a small circle with a pink-to-blue gradient outline in the top left; a horizontal bar with a cyan-to-blue gradient and white circular ends in the top center; a vertical bar with a cyan-to-blue gradient and a white circular end in the top right; a large, thick, curved pink-to-magenta gradient bar on the right side, starting with a white circular end; a horizontal bar with a cyan-to-blue gradient and a white circular end on the left side; and a diagonal bar with a cyan-to-blue gradient and white circular ends in the center. At the bottom, there are two small circles with pink-to-blue gradient outlines.

# Thank You