

 adjust +  unity

Hyper casual gaming in 2020

Charting the rise of
a blockbuster genre



Contents

- Hyper casual games explode and evolve 5
 - How has COVID-19 affected hyper casual gaming apps? 7

- User acquisition trends 9
 - What does it cost hyper casual games to acquire users? 11
 - How many users install hyper casual games from other apps? 12
 - What’s the conversion rate for a hyper casual ad? 13
 - How do these metrics compare to other games? 14

- Post-install performance 15
 - How long do users play games? 17
 - Do ads impact retention rates? 19
 - What’s the optimum number of ads a hyper casual app should show? 21
 - What is a typical hyper casual user’s lifetime value? 23

- The anatomy of a hyper casual game 25



Methodology

Verticals:

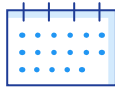


Hyper casual games



Dataset:

- Generated from a mix of the top 1,000 and all apps tracked in Adjust's system
- Hyper casual ad campaigns compared to all other game genres across Unity's network



Date:

Q4 2019 — Q1 2020

Executive summary

Mobile gaming is emerging as the prime pastime for app users. With record numbers of consumers practicing social distancing amid COVID-19, many people are using their downtime to discover new games or binge on old favorites. [Adjust data](#) on global gaming demonstrates just how significant that has been in the first quarter of 2020, with consumer spend, app engagement and downloads all jumping to record highs.

People across the globe are now spending more time than ever playing games. Perhaps more significantly, people are also engaging with advertising more. It's a trend that has played to the strengths of hyper casual's unique monetization model. This report provides insights into how hyper casual games have fared in the recent past, and what could be in store for the future.

- **Hyper casual games saw hypergrowth in Q1 2020:** Globally, installs more than doubled from December 2019 to March 2020. But users didn't just download more hyper casual games; they also played them more often. Adjust data reveals sessions grew by a whopping 72% in March. Unsurprisingly, March was the month when the lockdown went into full force, and also the period that saw sessions in many countries skyrocket. Confined to their homes, users needed no convincing to download and play hyper casual games.
- **Attractive CPIs are everywhere:** Despite a 35% decrease in costs, acquiring hyper casual users in the U.S. (\$0.42 at the end of March) came in at the high end of the scale. However, marketers can expect the highest conversion rates (17%) from users in this region. During the same period, costs in APAC declined sharply to tie with EMEA at around \$0.20. Globally, CPIs are much lower, averaging \$0.17 in Q1 2020.
- **IPMs are off the charts:** Globally, total installs per 1,000 impressions increased by 18.2% from Q4 2019 to Q1 2020. This indicates users are more engaged with ads and more likely to take action as a result of viewing them.
- **Advertising provides a positive impulse:** Predictably, sessions for hyper casual games are short (1.56 per user per day) and stickiness is moderate (11% for hyper casual games compared to 24% for all other games combined). However, this is the game experience the genre was built to deliver. Significantly, hyper casual games can display more ads than gameplay within a minute and still hold the attention of their audience and generate significant revenues. It would seem that it pays for marketers to show more ads. But users have their limits. Data indicates four ads per minute is too much of a good thing. Many games fall below that – missing out on an opportunity to make more money from showing the optimal number of ads to their audiences.
- **Benchmarks matter:** An examination of ARPU distribution shows that hyper casual games should strive to make at least \$0.13 per user. But marketers can also aim higher. The top 25% of hyper casual games pull in users that generate \$0.23, and the top 10% make an impressive \$0.30, or more than 2x the money compared to the median.



Hyper casual games explode and evolve

Globally, mobile gaming is well on track to being a \$100 billion market, with some estimates suggesting mobile gaming will generate revenues of \$95.4 billion by 2022, accounting for 41% of a total global games market worth \$196 billion.¹

The monstrous growth of mobile gaming has been powered by incredibly popular and massively addictive games such as hyper casuals, a game type that has exploded since it broke onto the scene in late 2017. This phenomenally popular genre is made up of lightweight games that are instantly playable and infinitely replayable. The combination of simple game mechanics and minimalistic design ensures a "tap-to-play" experience that is highly engaging.

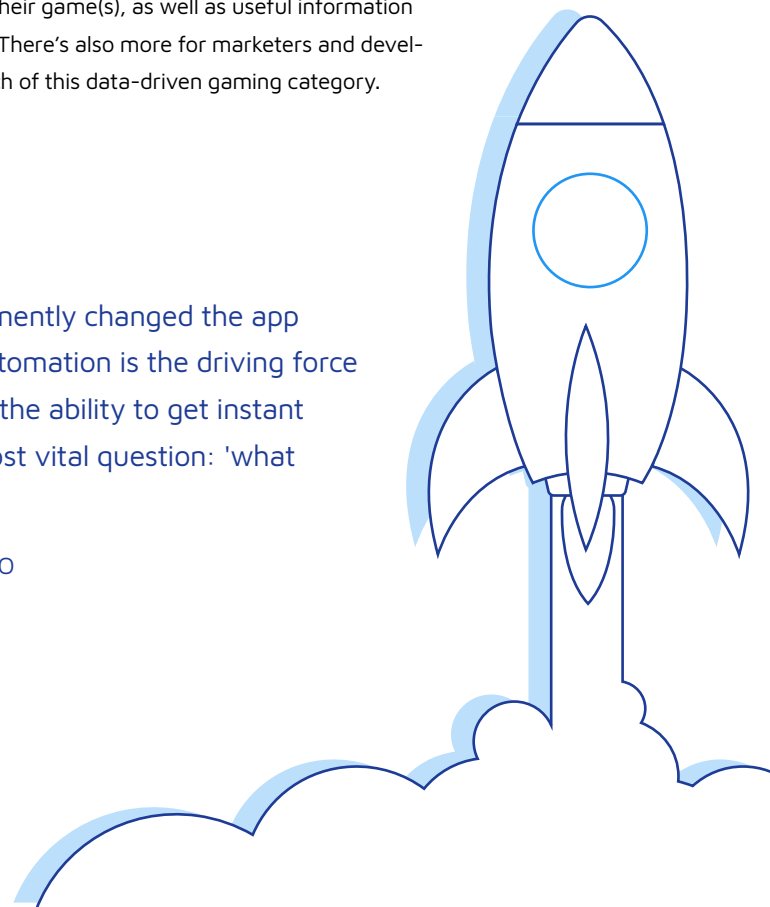
This dynamic also defines how this unique gaming genre makes money — relying on ad monetization for 95% of its revenues.² It also begs the question **whether hyper casual games are a genre at all**. Some argue that hyper casual games are, in fact, **a business model**, cleverly blending the best ad experience and the most engaging mechanics to appeal to the broadest category of players. In practice, these simple games allow players to pay for in-game resources, microtransactions and other items with attention. The outcome is a highly engaged player, and a valuable user base that accepts and appreciates commercials.

Adjust has partnered for the first time with Unity's comprehensive monetization platform to give marketers actionable insights for hyper casual developers looking to improve their game(s), as well as useful information for gaming studios outside of the hyper casual world to learn from. There's also more for marketers and developers of all kinds to marvel at, in the unique yet trailblazing approach of this data-driven gaming category.



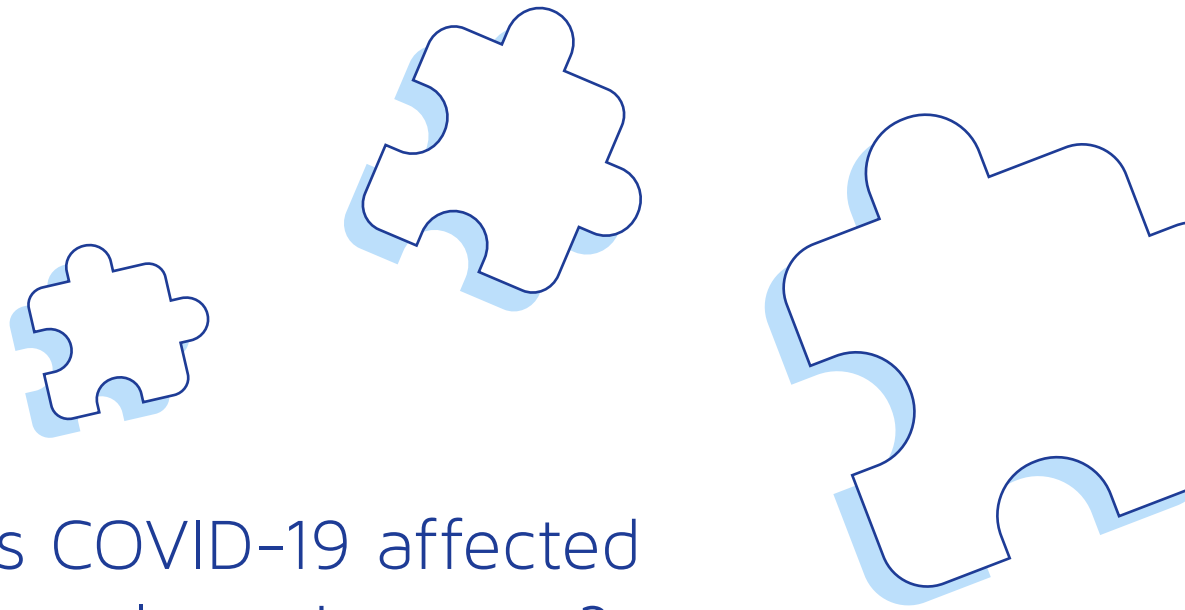
"Hyper casuals have permanently changed the app marketing playbook and automation is the driving force behind their rise, unlocking the ability to get instant answers to a marketer's most vital question: 'what works, and what doesn't?'"

Paul H. Müller, Co-founder & CTO



¹ According to [NewZoo](#), a research firm providing market intelligence for games, esports and mobile.

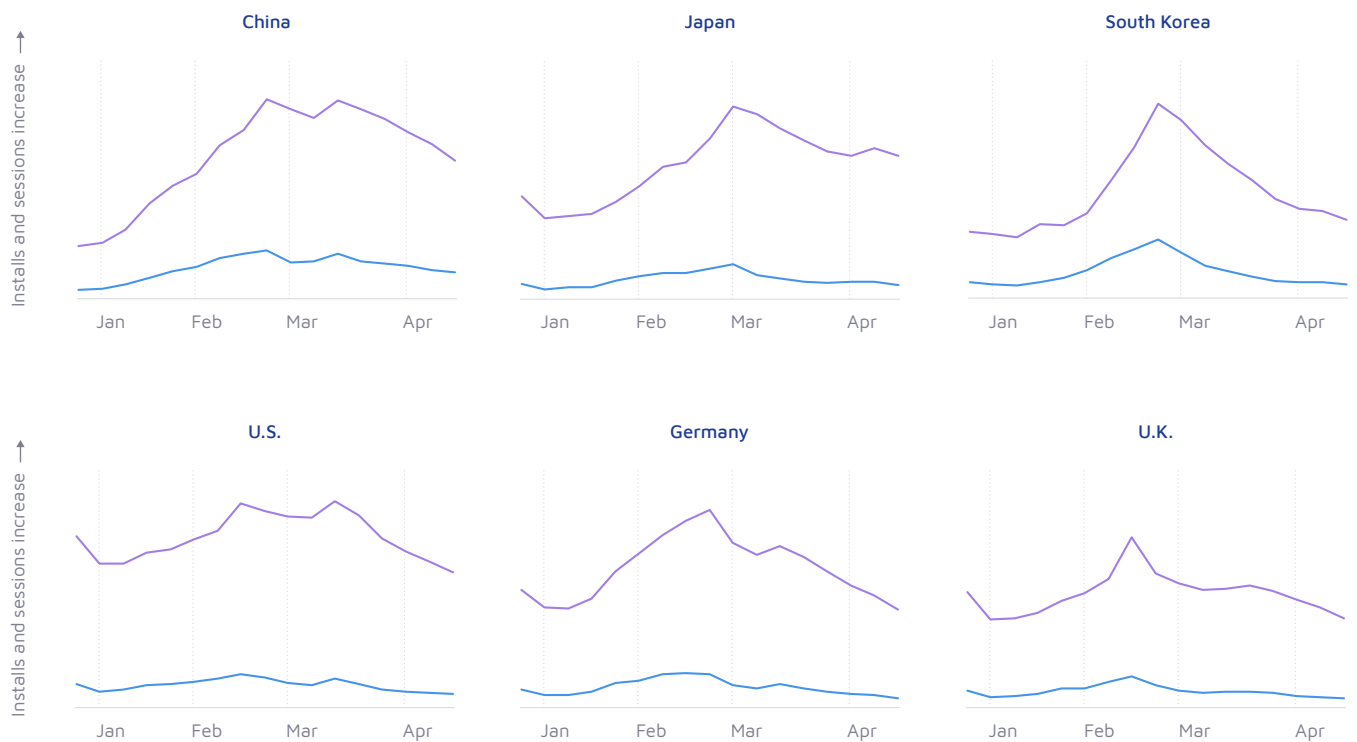
² [Deconstructing the State of the Hyper-Casual Market in 2020](#).



How has COVID-19 affected hyper casual gaming apps?

The global pandemic has upended societies and economies everywhere. What has been the impact on hyper casual gaming? Our first look suggests that COVID-19 has significantly contributed to driving more users to the genre. Cumulative install and session data for six countries from Adjust reveals how stay-at-home orders have increased interest in hyper casuals throughout the pandemic.

— Installs — Sessions





KEY FINDINGS

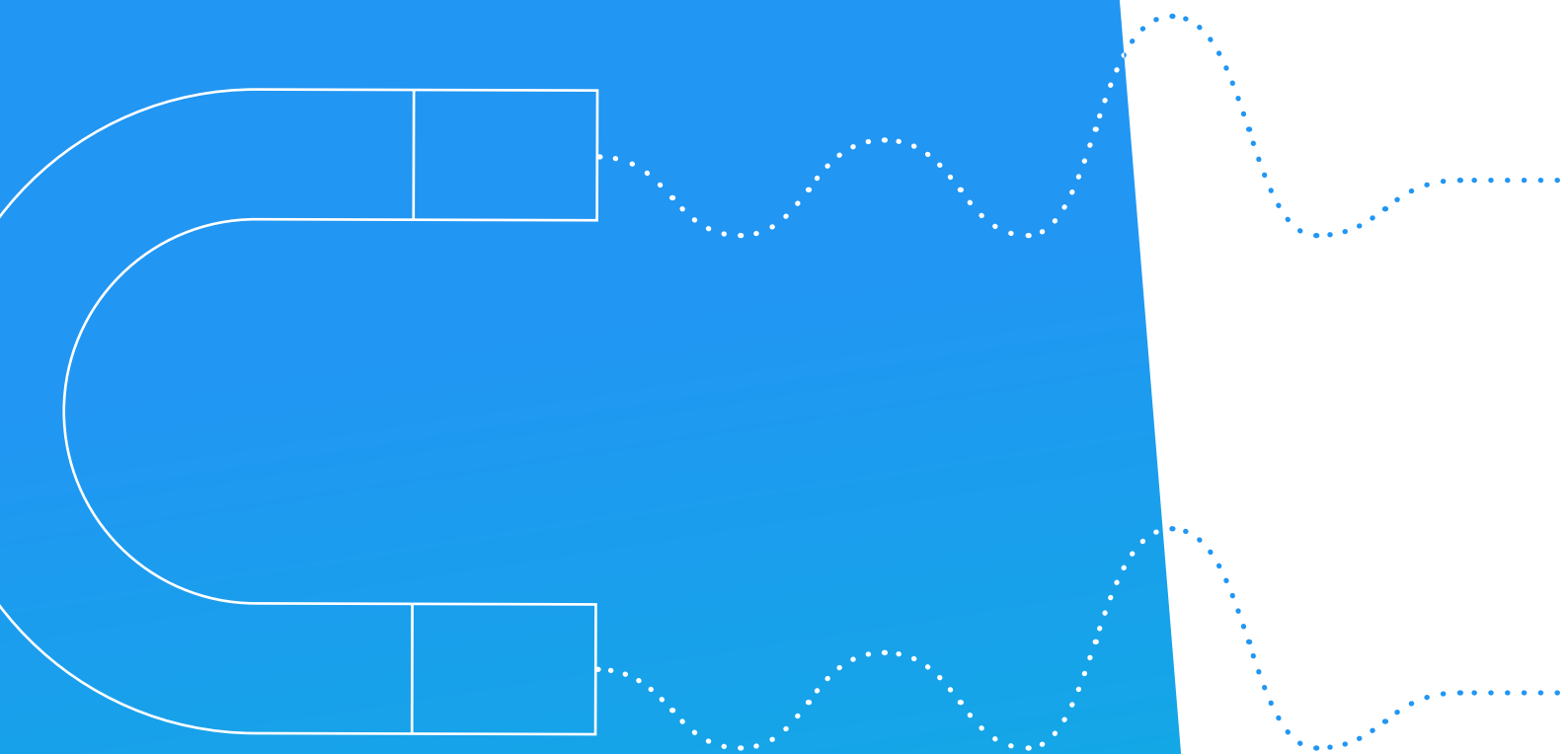
- Installs across the globe rose as users were social distancing at home. For the period December 2019 to March 2020 — installs more than doubled (103%) globally. The highest increase was observed in China — which grew 3.5x in four months (December through March).
- As installs rose, sessions ballooned to match. Compared to December 2019, which had already exceeded one billion sessions, hyper casual sessions increased a further 72% in March. China led the pack with an increase of over 300%. Other countries also made their mark: Germany saw a 69% increase in March compared with December 2019. For the same period, Korea saw a 152% increase and Japan saw a 137% increase.
- An examination of the ratio of paid vs. organic installs show the opposite dynamic as the number of apps installed from paid advertising declined 26% from 80% in October 2019 to 59% in March 2020. Ironically, organics come out the winner, showing that people stuck at home are more willing to browse and experiment.

The challenge going forward will be sustainability and growth prospects for the hyper casual genre after social distancing eases. Will new users continue to flock toward the genre? And will the broader trend of growing ad inventory be reversed as the overall economy picks up, allowing key metrics and methods to revert back to their pre-crisis mean? Will margins suffer from this drop?

Nothing is for certain, but it does appear as though the business model of hyper casuals is here to stay. This will no doubt have implications for mobile marketers from other verticals, as the overall trend toward optimization and automation takes hold.

Managing the in-app impacts of COVID-19

Mobile marketers have experienced significant fluctuations in their LTV calculations due to the effects of COVID-19, which have created an influx of users trying hyper casual apps for the first time, potentially skewing critical figures downward. Marketers must segment new users coming from organic sources, as well as the excess installs, by comparing previous performance in order to keep their models clean.



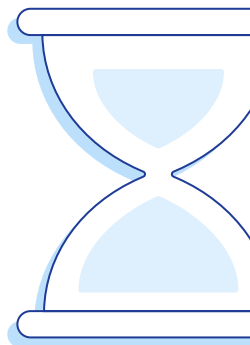
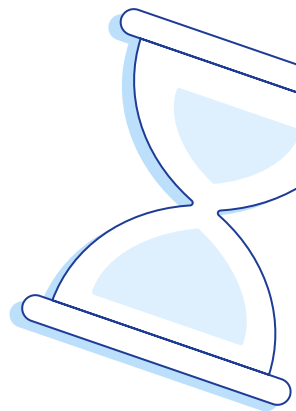
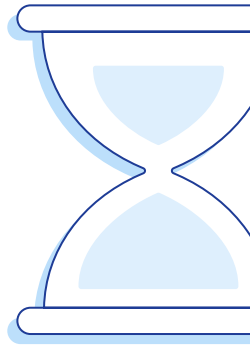
User acquisition trends

Understanding the true costs of user acquisition is a challenge many marketers face, as there are often few insights beyond what their own data tells them. However, data from Unity reveals just how much it costs to acquire users in hyper casual apps, as well as the volumes of users hyper casuals work with. Crucially, the data below includes cost per install, install per mille, and conversion rates for hyper casual ads. This is a must-read for all of those thinking about advertising hyper casual titles.



“Hyper casual games are often described using qualitative features of the game such as short but many sessions, or more simple gameplay. Yet we find it important to stress the need to define the game category with more data-driven insights, such as having the monetization strategy primarily based on ads (90%+), minimal or no IAP economy, and low cost per install with high conversion rates and lower retention. Being able to accurately define the metrics and mechanics behind hyper casual games enables these developers to effectively set their user acquisition and monetization strategies up for success.”

Päivi Pütsepp-Seufert, Head of Performance Advertising

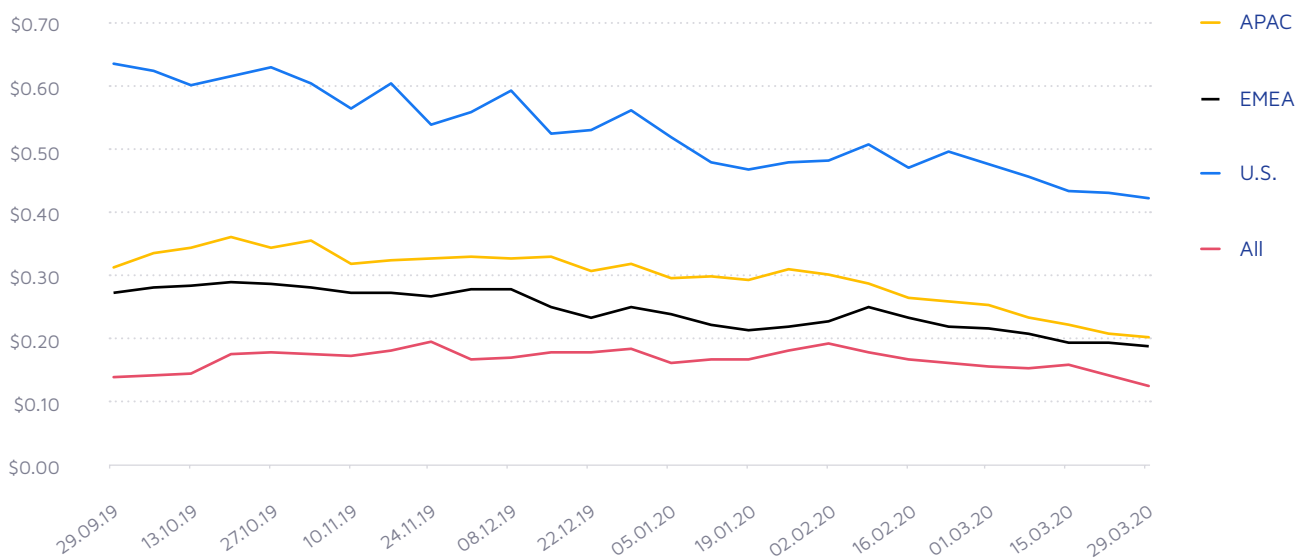


CPI per region

What does it cost hyper casual games to acquire users?

The cost of acquisition varies, and depends on a number of factors, such as country or region. The chart from Unity reveals the cost per install (CPI) for hyper casual ads across Unity's network.

Cost per Install, Hyper casual games, Q4 2019 - Q1 2020



KEY FINDINGS

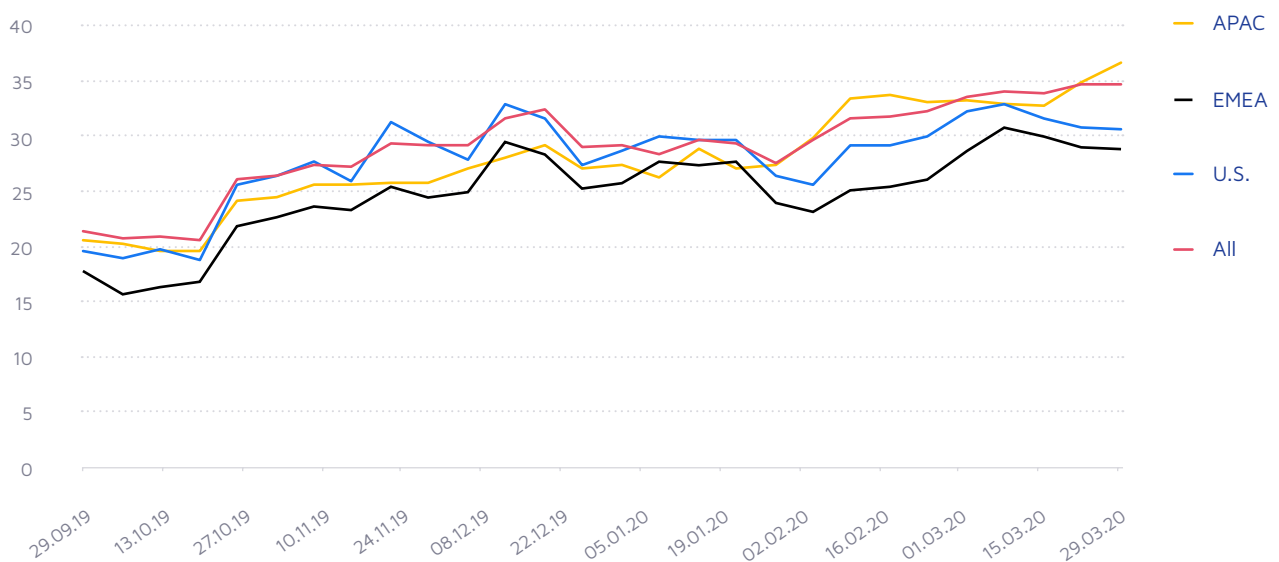
- An examination of CPIs from Q4 2019 to Q1 2020 reveals users in the U.S. offer value for the acquisition cost. Overall, CPIs decreased 35% for the period, at \$0.42 by the end of March. Yet users in the U.S. are still coming in with a price tag that is more than double the cost to acquire a user in EMEA (\$0.19).
- CPIs in APAC over the same period plummeted from \$0.31 at the start of Q4 2019 to \$0.20 at the end of Q1 2020. Surprisingly, costs closed the gap with EMEA, exceeding their price by a mere penny.
- Globally, the average cost to acquire a user hovers at \$0.17 throughout much of Q1 2020. This level could be attributed to the impact of much lower CPIs in LATAM, specifically countries such as Brazil and Mexico, where large and eager user bases can't get enough of these games.

IPM per region

How many users install hyper casual games from other apps?

Knowing the typical number of installs from a thousand impressions gives marketers a strong baseline to make the right decisions. Unity install per mille data (known as IPM, the metric represents the number of installs per 1,000 ad impressions) reveals shifting benchmarks over the past six months.

Installs per Mille, Hyper casual games, Q4 2019 - Q1 2020



KEY FINDINGS

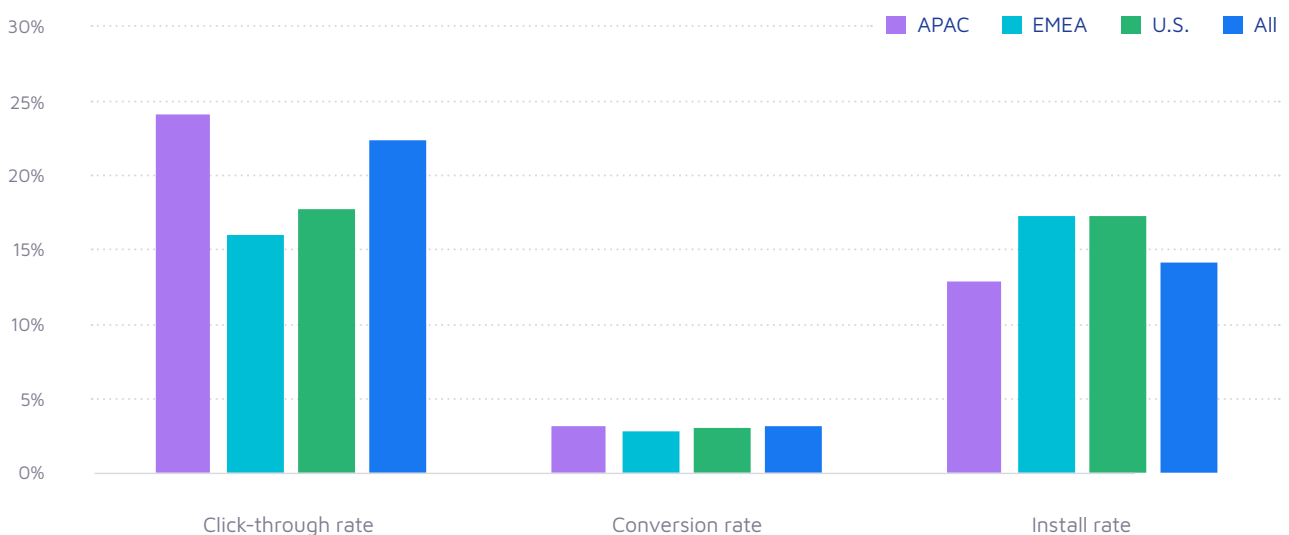
- For the period Q4 2019 to Q1 2020, IPMs across all regions show significant growth. IPMs in APAC have rocketed 71%, compared to 64% in EMEA and 57% in the U.S.
- While CPIs for the U.S. market were pricey by comparison to other regions, it's clearly home to highly-engaged users. On average, 30 users out of 1,000 download a game after seeing an ad, compared with 27 in EMEA.
- Globally, the average IPM rate in Q4 2019 showed that 26 users out of 1,000 installed a game after viewing an ad. This total increased 18.2% to 31 users in Q1 2020, indicating more users were eager to interact with and act based on advertising.

CTR, CVR, IR

What's the conversion rate for a hyper casual ad?

Unity has compiled conversion rates for hyper casual ads, setting the benchmark for click-through rates (impressions to ad clicks) conversion rates (which measure the funnel from impression to install) and install rates (ad clicks to install).

Hyper casual CTR, CVR and IR, Q1 2020



KEY FINDINGS


- Ad effectiveness is the highest in APAC, but it appears that users are more apt to interact with ads rather than install a game as a result. With a high CTR of 24%, it's clear that users are paying attention to ads and perhaps even relying on them to discover new games. But their actions tell a different story, as the actual install rate (13%) comes in at the low end of the scale.
- Data indicates U.S. users are not great fans of advertising, but they are quick to download games they like. CTRs are 18% (26% lower than APAC), while install rates are an impressive 17% (34% higher than APAC).
- CTRs in EMEA are the lowest in the mix, coming in at 16%. This would suggest that users there are slightly more averse to advertising. However, audiences there install games at a high rate (17%) — identical to the U.S.

CPI and CVR per platform and vertical

How do these metrics compare to other games?

The data below shows how cost and conversion rates (CVR) compare to other game genres, demonstrating that user acquisition for hyper casual apps is cost-effective and incredibly efficient.³

Android — Global

METRIC	ACTION	ADVENTURE	CASUAL	HYPER CASUAL	RPG
CPI	\$0.25	\$0.53	\$0.40	\$0.16	\$1.89
CVR	2.18%	1.20%	1.18%	3.34% 	0.58%

iOS — Global

METRIC	ACTION	ADVENTURE	HYPER CASUAL	RPG
CPI	\$1.14	\$1.65	\$0.46	\$0.78
CVR	1.21%	0.74%	2.72% 	1.66%



KEY FINDINGS

- On both platforms, hyper casual apps are the hands-down winner, netting the highest engagement rates (Android — 3.34% and iOS — 2.72%) for the lowest costs (Android — \$0.16 and iOS — \$0.46). This speaks to the popularity of hyper-casual apps.
- Interestingly, Android is also a platform to reach and convert Action gaming users. At \$0.25, the cost is the second lowest and conversion is an attractive 2.18%, the second highest.
- Role-playing games on iOS appear to be a crowd-pleaser. At \$0.78, the cost is 70% higher than hyper casual. But you get what you pay for — conversion rates are a rewarding 1.66% which is 37% higher than Action and 124% higher than Adventure.

³ Data is compiled based on the publicly available app store categories within the Google Play and Apple App Stores.



Post-install performance

While Unity data provides a clear picture of how users enter the funnel, it's just part of the story. Marketers also need to know what happens beyond the install. Adjust data delivers a first time look at the effects ads have had on user behavior and monetization to find the perfect sweet spot of in-app advertising.

Top tips on testing

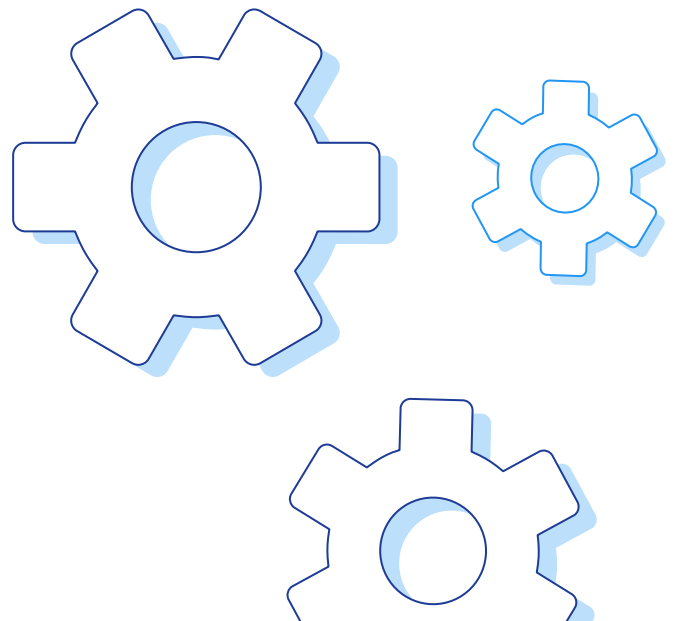
Hyper casual gaming is built on A/B testing. But marketers new to this approach need to be wary of differences between testing and real-world performance. Trkay nal, Head of Marketing & User Acquisition at Narcade, a mobile gaming publisher, points out that great results are often a feature of testing, but the figures rarely match global campaigns. Testing usually involves limited budgets where "you can get really low-priced CPIs, along with good install rates." But after a launch, budgets increase, and performance usually drops. Marketers, Trkay advises, should scale their testing budgets accordingly.



NARCADE.

"While you are testing your hyper casual game, you can reach extremely high IPMs. But in real user acquisition when you are spending much more money, you would most probably get lower IPMs. Hyper casual marketers must be aware of that and test with larger budgets."

Trkay nal, Head of Marketing & User Acquisition

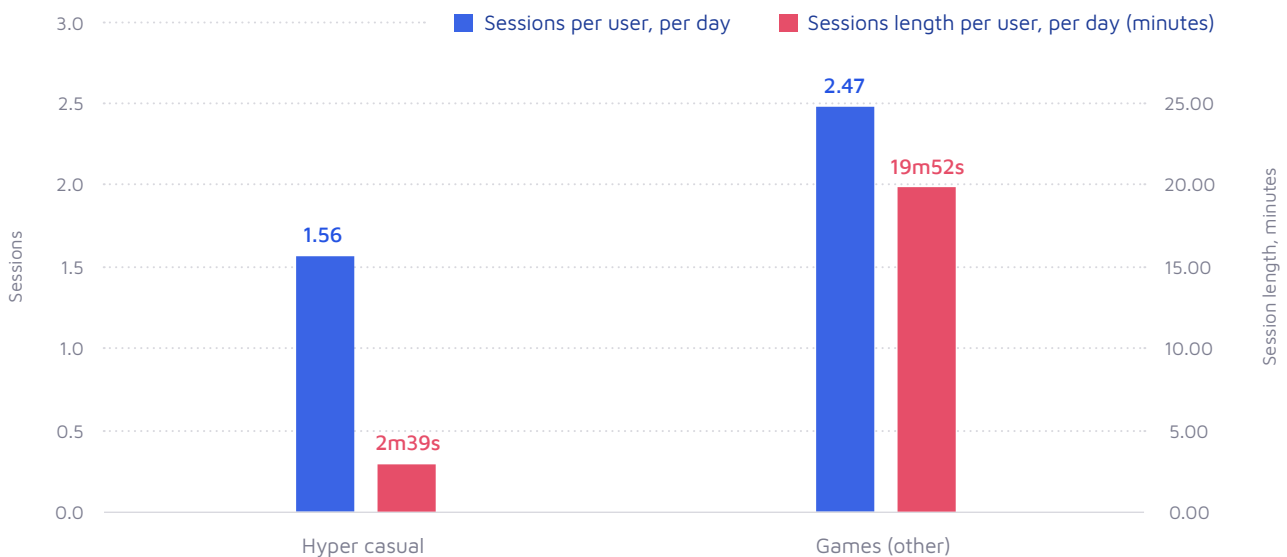


Sessions and session length per user

How long do users play games?

A marketer knows that a game is only as good as its playtime. Adjust data shows the number of average sessions a user opens up, along with session length, to reveal a stark difference in app performance between hyper casual and other types of games.

Sessions and session length per user, per day, avg. Q1 2020



KEY FINDINGS

- Hyper casual games sessions are shorter compared to all other games, but this is the player behavior they were designed to deliver. Short sessions on a daily basis are plenty for users to find enjoyment in. At 1.56 sessions per user per day, hyper casual comes in 37% lower than the average for all games combined (2.47 sessions per user).
- Session length for hyper casual is also lower, at two minutes 39 seconds per user per day compared with nearly 20 minutes per session per user per day for other games.
- Significantly, data around game stickiness (a measurement that reflects the number of daily active users against monthly active users) tells an interesting story. Hyper casual games have a stickiness score of just 11%, more than 2x lower the stickiness for all other games combined. Once again, this is the goal hyper casual games set out to achieve in the first place. Their business model anticipates high churn per app, so moving lapsed users on to the newest game in the portfolio becomes the next priority.

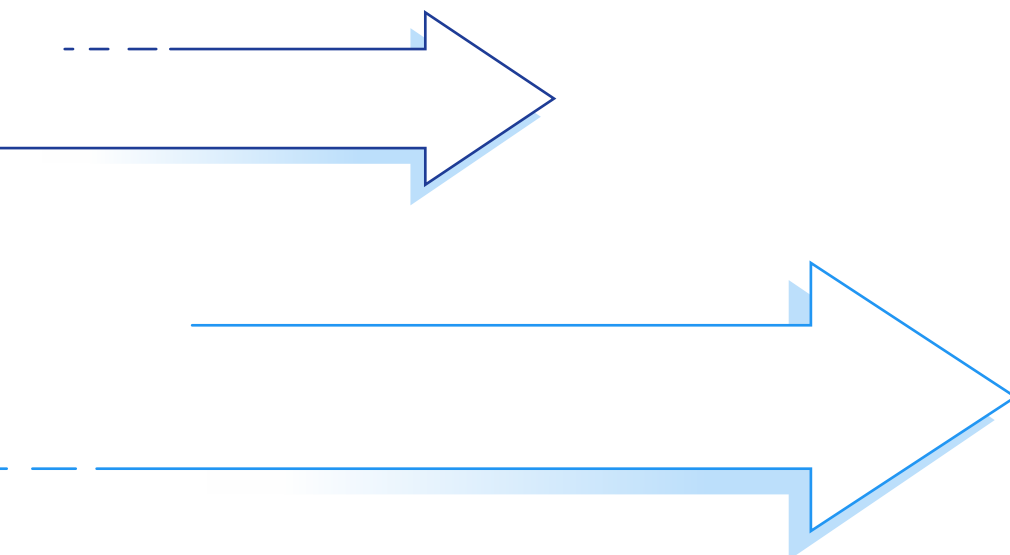
“Session length is highly important” for hyper casual apps according to Yury Bolotkin, Growth Specialist at Popcore, a Berlin-based hyper casual publisher. The longer users stay in-game, the more ads they watch — a direct connection to increased revenues. To encourage users to stay playing longer, hyper casual’s need to develop more engaging mechanics for both new and old (but still popular) titles.



POPCORE

“A progression mechanic dramatically improves the number of times people login to a game and also extends the time users spend in-game.”

Yury Bolotkin, Growth Specialist

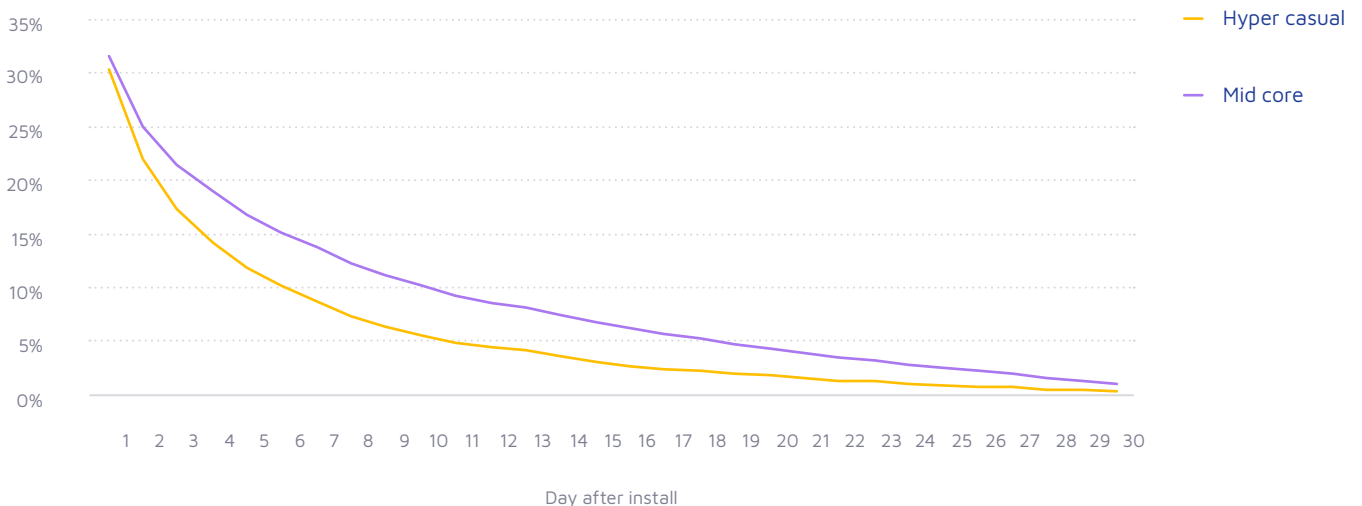


Retention rates vs. ads shown

Do ads impact retention rates?

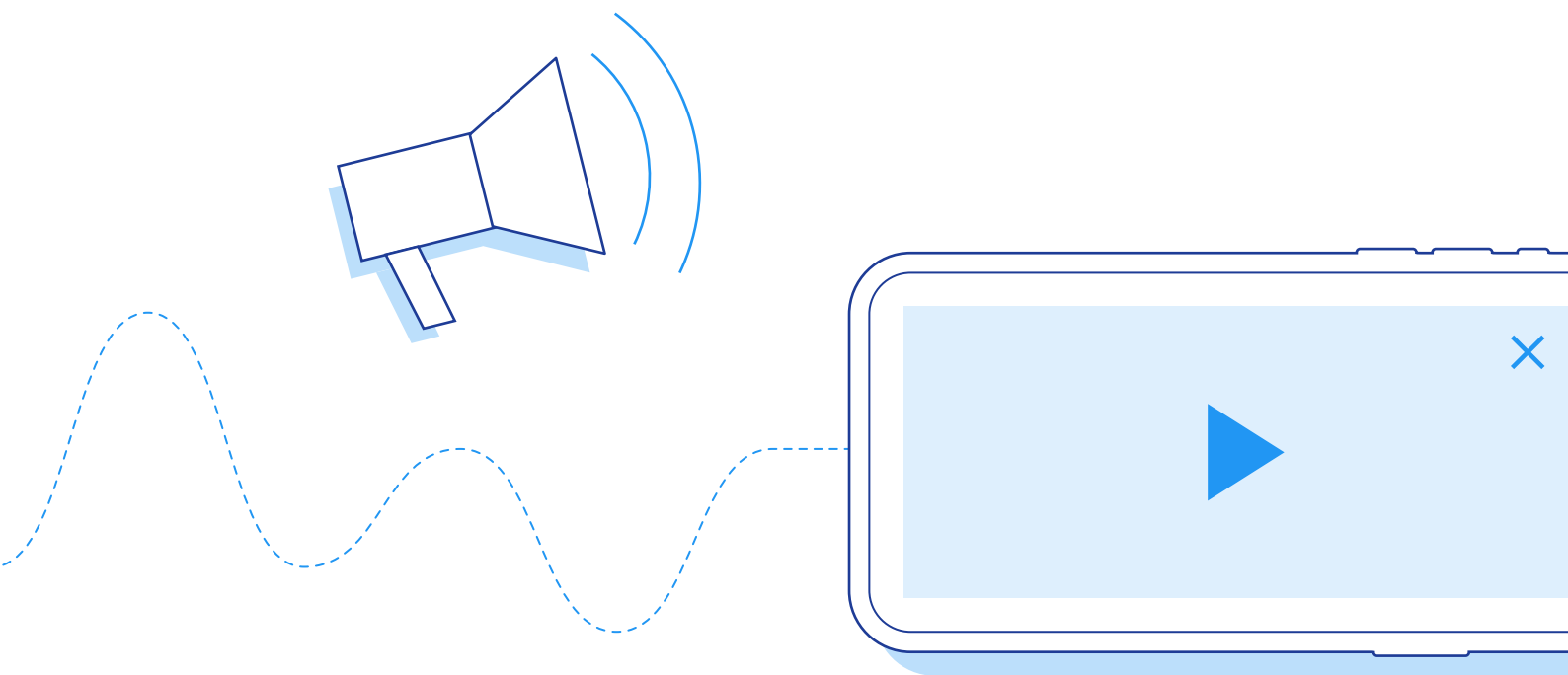
Games should be replayable — and retention rates are one of the better metrics to understand if users are sticking around. Adjust's retention rates keep track of the number of users who return to an app each day after install. And for the first time, retention analysis is extended to look at the impact ads have on retention of hyper casual games, to reveal that users are fine with viewing multiple ads per play (but only to a point).

Hyper casual vs. Mid core retention, avg. Q1 2020

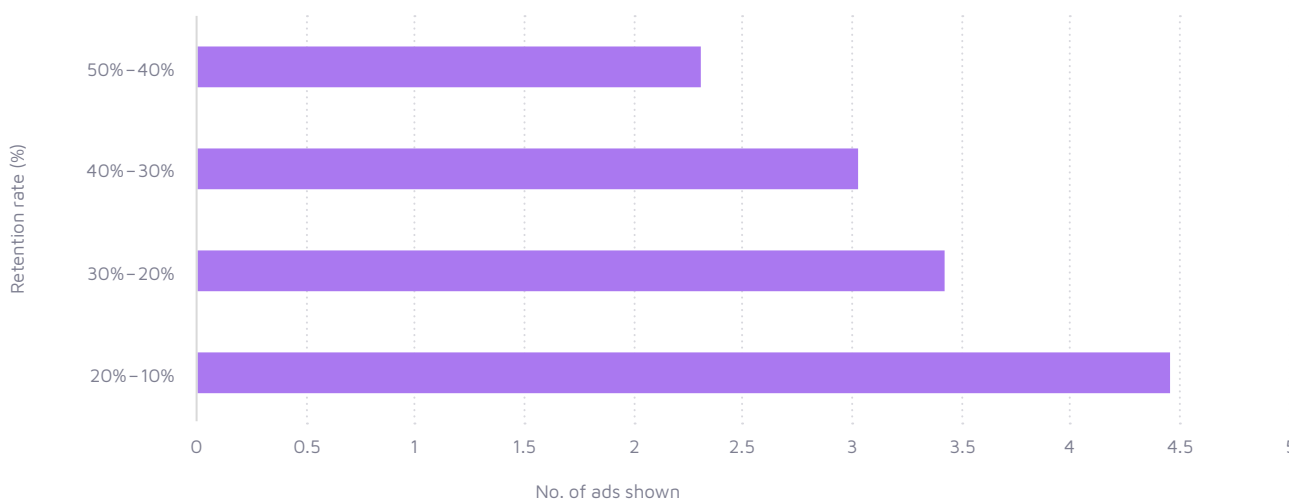


At 30.4%, Day 1 retention rates for hyper casual are comparable to mid-core titles (31.7%). Mid-core gamers, drawn in by challenging game mechanics, naturally, are more engaged with their favorite games for longer. Retention rates decline faster for hyper casual games than for mid-core. By Day 7, hyper casual games retain 8.7% of users compared to mid-core (13.7%), showing a 37% difference. However, the gap shrinks by Day 30, when both apps retain 1% or less of their user base.

The very nature of hyper casual is tied to high retention rates. Adjust data reveals that the number of ads you show per minute can have a massive impact on retention rates — however, more is not always better.



Average no. of ads per minute vs. retention, Q1 2020



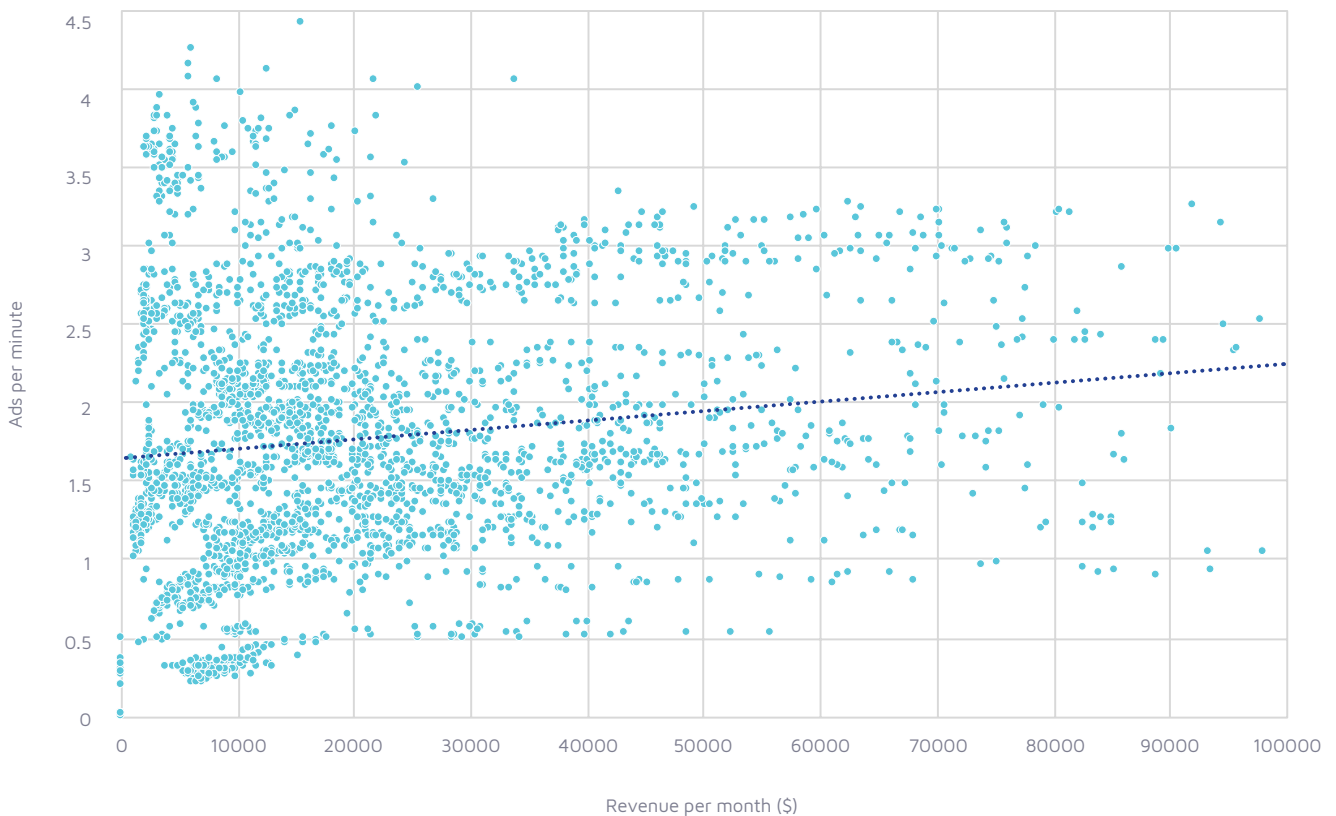
While users appreciate advertising and understand its benefits (namely, free gameplay and perks in return for their undivided attention), retention rates do show a decline if too many ads are packed into one session. Specifically, the more ads shown per session (per minute), the more likely a user is to churn. Showing under 2.5 ads per session results in a user retention of 40-50%. Showing more than four ads per session negatively impacts user retention, driving the rate down to less than 20%.

Ads shown per minute vs. monthly revenue generated

What's the optimum number of ads a hyper casual app should show?

Retention rates decline as the number of ads shown increases, but this is not an outcome that has worried hyper casual game developers. Their business model is designed to attract a large audience and keep them amused with simple gameplay for a short period of time. Hyper casuals make their money by showing as many ads as possible to as many users as they can reach. As advertising is the lifeblood of hyper casual gaming companies, it's important to know how many ads to show and how to avoid leaving money on the table. The chart below gives guidance on both, revealing the revenue an app generates in a month versus the number of ads shown per minute highlighting the overall distribution of monthly revenue for ads shown.

Avg. Ads per minute vs. revenue, Q1 2020





KEY FINDINGS

- Strikingly, hyper casuals can display **more ads than gameplay** within a minute and still generate profit. Yet no hyper casual app can be this aggressive without foregoing a ton of additional revenue. For example, hyper casual games that show more than four ads or more per minute generate only moderate revenues by comparison, hitting a ceiling at around \$35,000 per month.
- At the lower end of the scale, where hyper casual games show fewer ads, revenues are significantly higher. The sweet spot appears to be between 2 and 3 ads per minute, a total that enables hyper casual game companies to boost their revenues by as much as 10%.
- A breakdown of earnings shows that of the games in the dataset, only 84 generated more than \$20,000 in monthly revenue as a result of showing one ad, or less. By comparison, 640 games generated the same amount (more than \$20,000) showing 1-2 ads. Finally, 338 games displayed 2-3 ads, earning the same amount of revenue.

Ads are only as effective as the creatives that users see. As a rule, hyper casual marketers need to combine lots of testing with the right infrastructure to find the best combination. Emre Tas, CEO of Alictus, a hyper casual publisher, points out the importance of automation to reaching the level of testing that's required, saying, "you have to create hundreds of different creatives and also be able to test those creatives." Without automating A/B testing, finding useful results isn't achievable. Emre also notes it's the combination of factors that leads to success, not just a single optimization.



"A good marketer should be able to find which creative platforms work best with the right campaign and channel, while updating their creatives in a continuous cycle at a fast pace."

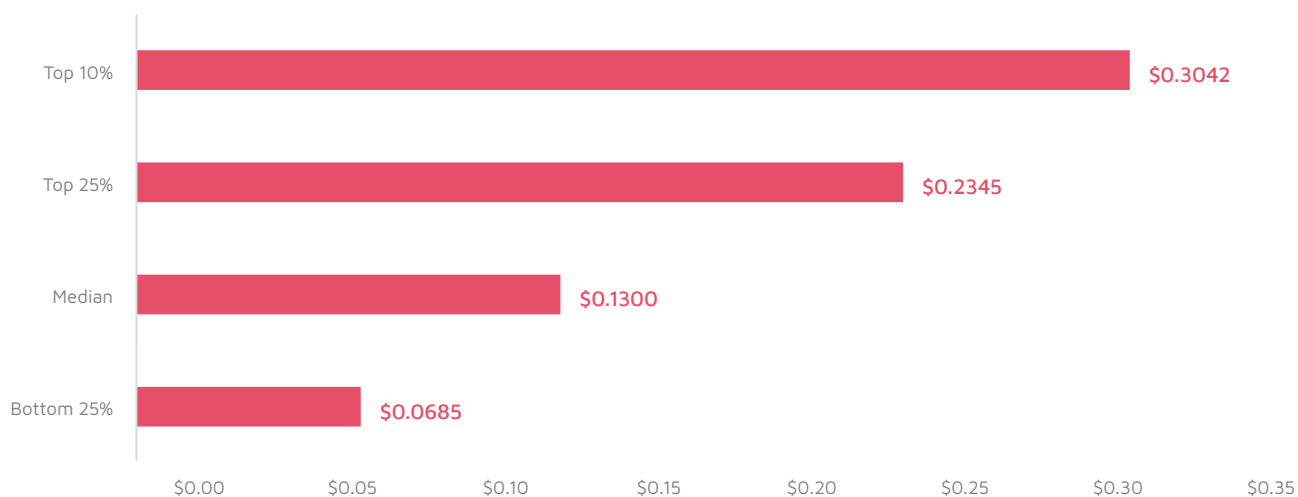
Emre Tas, CEO

ARPU

What is a typical hyper casual user's lifetime value?

Lifetime Value (LTV) is a marketer's North Star metric, measuring the amount of revenue gained per user until that user churns. Using Adjust cost data, we've measured the distribution of average revenue per user (ARPU) across hyper casual app performance, allowing you to benchmark against the rest.

Hyper casual ARPU by performance level, Q1 2020



KEY FINDINGS

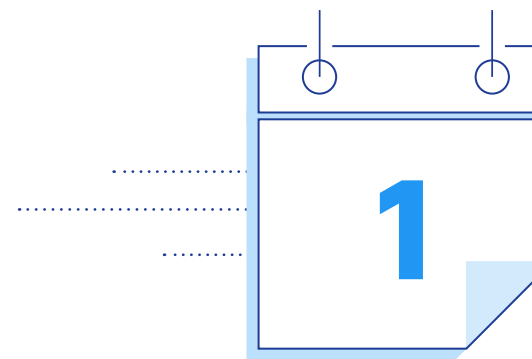
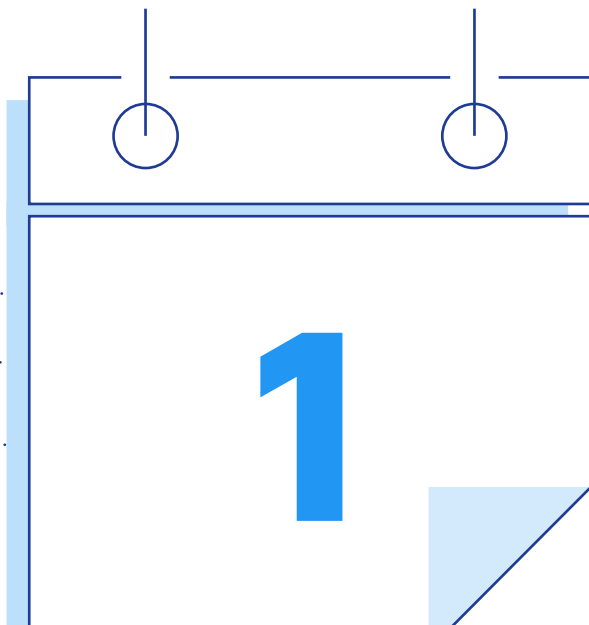
- An examination of the distribution of revenue per user shows that the median figure for hyper casual is \$0.13. In other words, if you are seeing a figure higher than that, then it's time to break out the champagne. Your game is a high performer, better than 50% of your rivals.
- Chalking up \$0.23, the top 25% of hyper casual apps generate an impressive revenue, reaching 80% more than the median. When we get to the top 10%, the hit games of the mix, the numbers skyrocket. At \$0.30, these games generate over double (131%) the money compared to the median.
- The poorest performers (the bottom 25%) generate a mere \$0.07 per user, 46% less than the median rate.

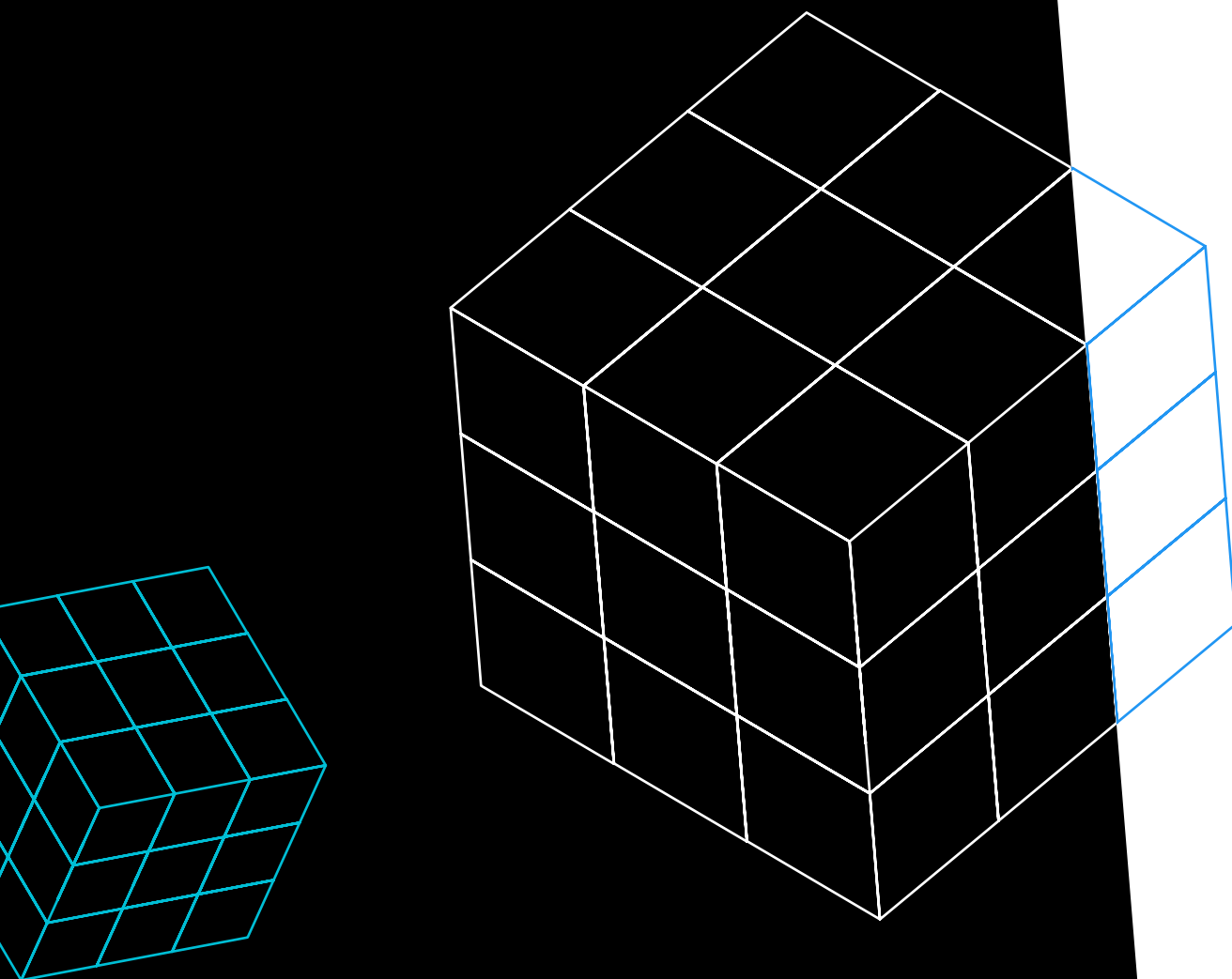
In the experience of Etienne de Guébriant, Head of UA at Gazeus Games, hyper casual marketing managers focus on three core metrics: CPIs, retention rates, and LTV. While it's important for marketers to keep an eye on a diversity of metrics, Etienne emphasizes that these are the vital three to track



“Making sure your game has a high Day 1 retention rate, combined with super low CPI, is key for hyper casual. Though LTV is also important, be aware that you might need to look at a shorter payout window than other types of game — after all, once a player is finished, they’re less likely to return, unlike mid-core and casual titles.”

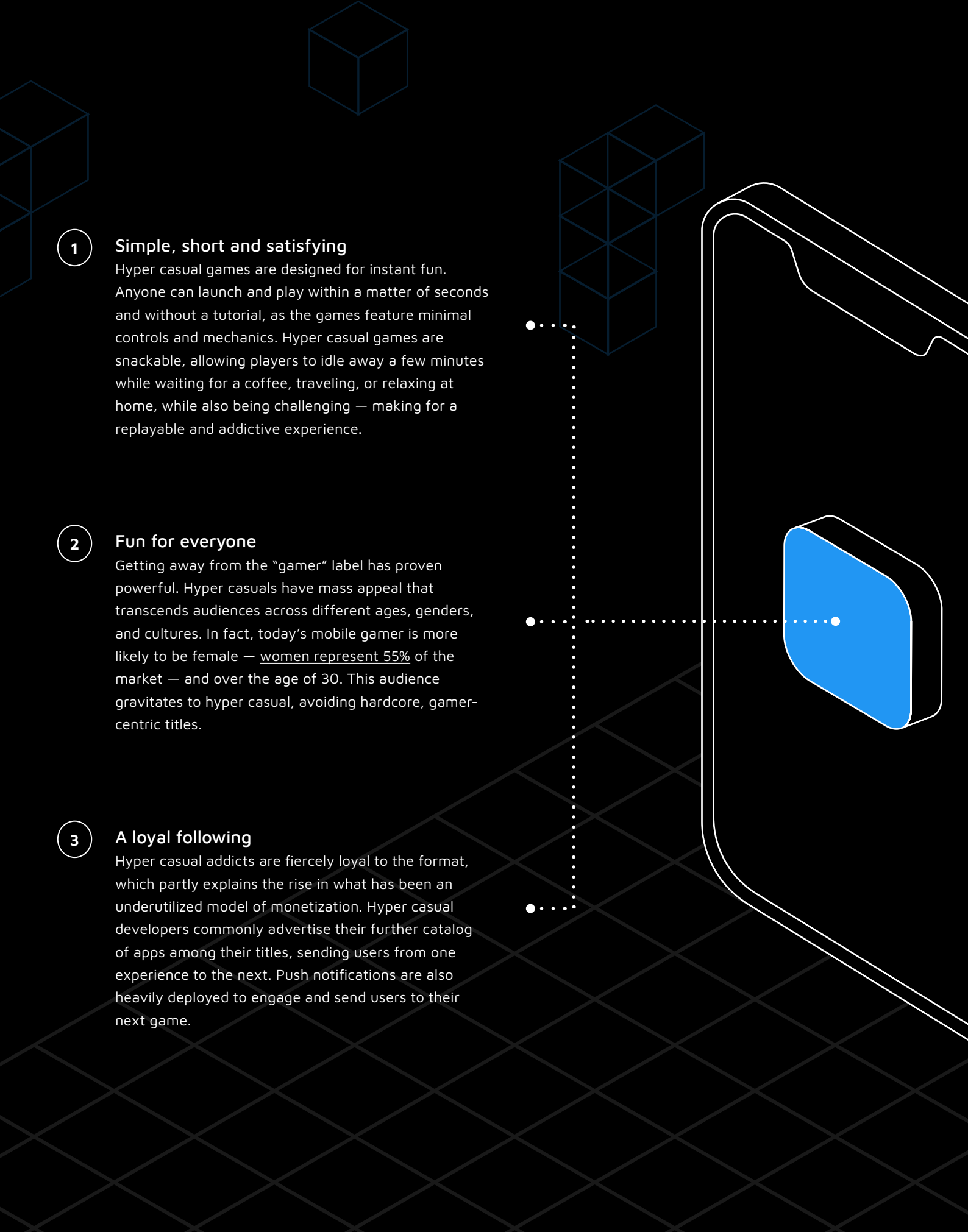
Etienne de Guébriant, Head of UA





The anatomy of a hyper casual game

Hyper casual games are simple, easy-to-understand gaming experiences that provide immediate, instant satisfaction for players. They're also a mobile monetization phenomenon. The background and benefits of producing hyper casual is known to many, but this section covers the main points that will get anyone up to speed.



1

Simple, short and satisfying

Hyper casual games are designed for instant fun. Anyone can launch and play within a matter of seconds and without a tutorial, as the games feature minimal controls and mechanics. Hyper casual games are snackable, allowing players to idle away a few minutes while waiting for a coffee, traveling, or relaxing at home, while also being challenging — making for a replayable and addictive experience.

2

Fun for everyone

Getting away from the “gamer” label has proven powerful. Hyper casuals have mass appeal that transcends audiences across different ages, genders, and cultures. In fact, today’s mobile gamer is more likely to be female — women represent 55% of the market — and over the age of 30. This audience gravitates to hyper casual, avoiding hardcore, gamer-centric titles.

3

A loyal following

Hyper casual addicts are fiercely loyal to the format, which partly explains the rise in what has been an underutilized model of monetization. Hyper casual developers commonly advertise their further catalog of apps among their titles, sending users from one experience to the next. Push notifications are also heavily deployed to engage and send users to their next game.

4 A new way to monetize

Hyper casuals shook the industry by making in-app ad revenue mainstream. The bulk of hyper casual studio revenue comes from players watching ads, which are served at a high frequency (making them part of the experience). Ads can be shown at volume because the levels are short and challenging, meaning more opportunities to show adverts when a player fails or progresses.

5 Driving down CPIs

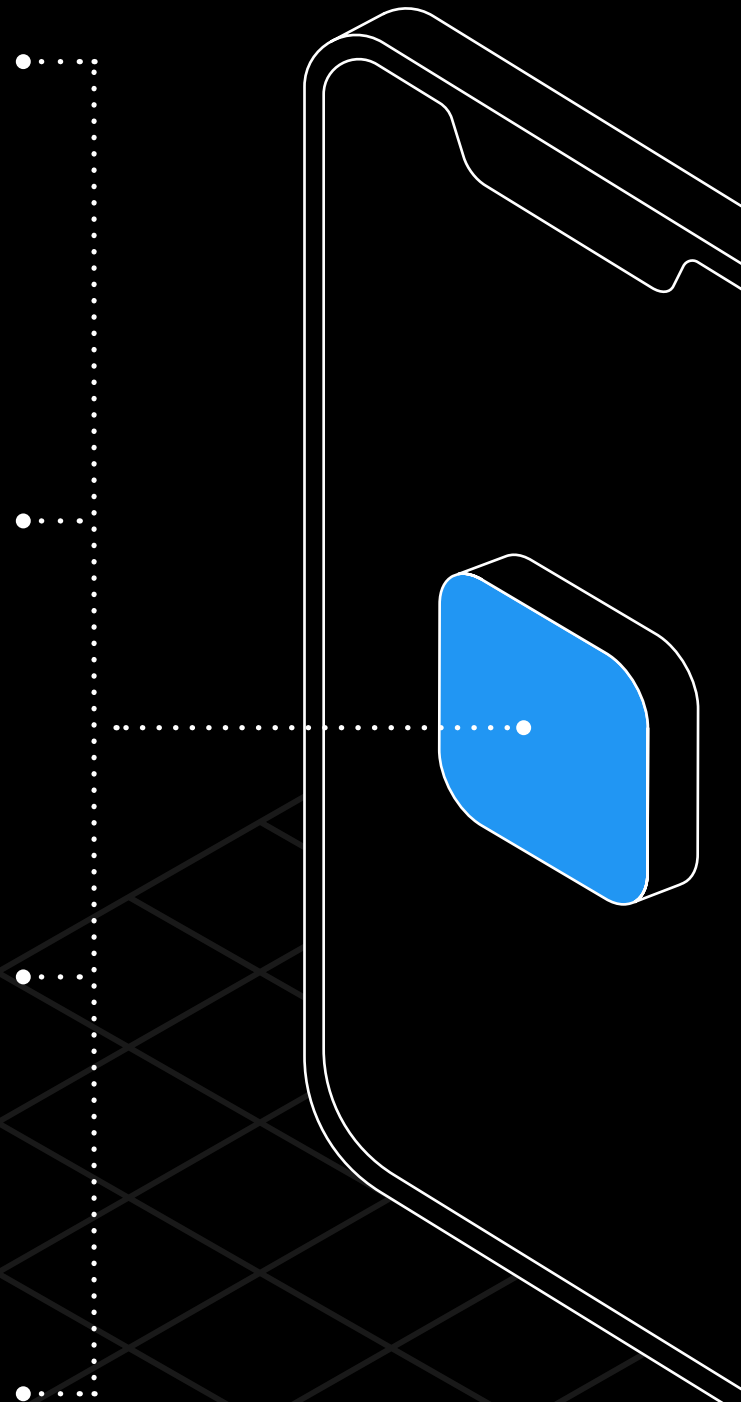
The cost to acquire users must be low in order for ad revenue to make sense. "Hyper casuals are reliant on very low CPIs," Thiago Monteiro, Director of Growth at Peak, observed in a recent panel at [Mobile Spree](#), "as soon as an audience gets too expensive, they need to step out."

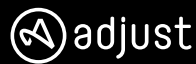
6 Speed and momentum are paramount

Hyper casuals are produced fast, iterated quickly and dumped if they don't perform. For publishers, getting a game from ideation to testing to updates could take as little as six weeks, or even less in some cases. Soft-launches are used to test and see what sticks, and then high-volume marketing turns potential high-performers into hits. The apps are then optimized over time, with additional features circulated across app titles.

7 Data-obsessed

Above all, decisions made in hyper casual are made with one thing in mind: data. Hyper casual only works with a performance-driven mindset, and marketers must be willing to experiment with all types of formats to see what works, using only data to evaluate their decisions.





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ABOUT ADJUST


Adjust is a global B2B SaaS company. Born at the heart of the mobile app economy and grown out of a passion for technology, the company now has 16 offices around the world.


Adjust's platform includes measurement, fraud prevention, cybersecurity and marketing automation products. Together, they make marketing simpler, smarter and more secure for the 32,000 apps working with Adjust. Global leading brands including Procter & Gamble, Rocket Internet and Tencent Games have implemented its solutions to secure their budgets and improve results.

Last year, the company secured one of 2019's largest funding rounds in Europe, raising nearly \$230 million.

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Unity's user acquisition suite is a comprehensive buying solution that lets you reach, target, and convert the right players for the right price. Whether you're an indie developer or a large studio, Unity's solutions can be tailored to your specific needs. Depending on your monetization strategy – ads, in-app purchase (IAP), or a combination of both – you can choose to focus on supporting increases to the ads' viewer base, or ensuring that you pay the right price for your users, based on the value they bring in return. Easily set up, manage, and optimize your campaigns using Unity's self-serve dashboard, where you can configure campaigns, generate creative packs, set targeting, receive budget alerts, and more. With unique player behavior insights, premium ad inventory, and self-service tools, we have everything you need to scale your app.

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