



SINGULAR ROI INDEX

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Have we ever seen so much change in the mobile marketing industry? Accompanied by so much change in the world at large?

The 2021 Singular ROI Index reflects the change we saw last year: an astonishing 10 new ad networks on our global ROI lists. This is the all-region, all-vertical, all-encompassing list that is the very hardest to place on, and for 2021 we have 10 new companies here. We rarely see such a change.

There's a lot of data that goes into these lists:



From that data we've built no fewer than 27 different top lists for regional and vertical-specific results, along with some fraud lists (yes, low is good!) and retention lists.

In all, there are:



To see which networks showed up on the most lists ... keep scrolling. You'll see it in "Overall best bet ad networks."

Overall industry insights

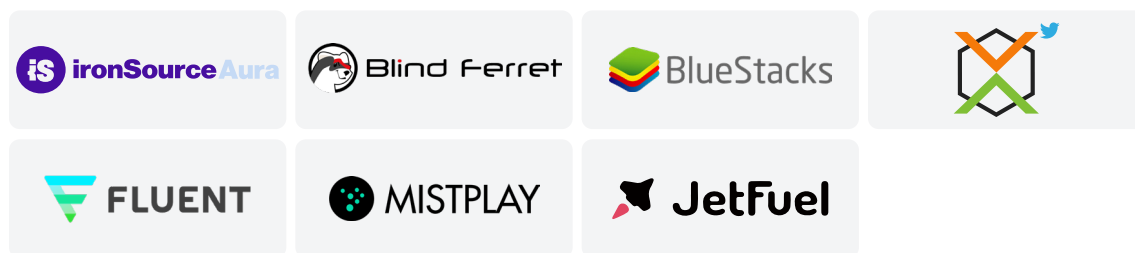
Perhaps it's not surprising that after a year marked by massive disruption and rapid change, we're seeing significant innovation in mobile marketing. It's not just COVID-19 or iOS 14 either: it's emerging platforms and emerging strategies for mobile user acquisition specifically and mobile marketing in general.

Here are a few things that stood out when we reviewed the data:

A disturbance in the force: 10 new players on the global list

Maybe it's 2020. Maybe it's reflective of a changing ecosystem. And maybe it's part of the change that is bringing iOS 14 and SKAdNetwork. Whatever the reason, we've never had so much change in our global list.

Here are media sources, ad networks, and platforms that are new to the Singular ROI Index. Some have been honorable mentions before, but none of these featured in the 2020 Index. This year, they're not only on one or two of the top lists ... they're on the overall global all-regions all-verticals list:



Plus, there are three other networks that have appeared on regional or vertical-specific lists before, but are new to the global ROI list:



Overall industry insights

On-platform, OEM publishing, and advertising solutions

OEM or on-device platforms such as Digital Turbine, ironSource Aura, and AppNext are performing extremely well. They perform on-device app discovery via a persistent experience on new devices and a set-up wizard upon activation. They can tie into the home and/or lock screens, and offer live updates on new apps to try.

Digital Turbine and ironSource Aura together account for eight spots in the 2021 ROI top charts, and offer extremely impressive ROI.

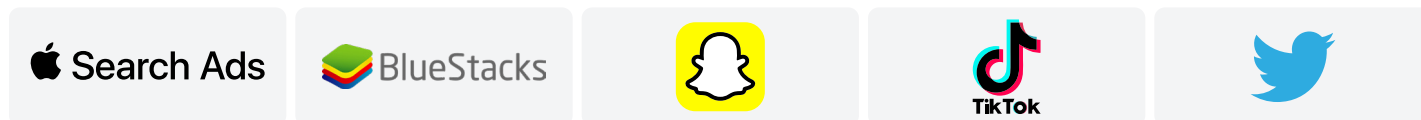
Platform expansion, but not the way you think

It's no secret that platforms are powerful. Platforms like Google and Facebook which can generate much of the supply that they then feed with demand in their own proprietary ad platforms are extremely successful. In a sense, these are two-sided marketplaces connecting advertisers (who pay with money) and consumers (who pay with attention).

What's new?

We're seeing expansion of that model with players who have been around for a while, but are showing their increasing strength. They are getting more and more successful at generating extremely low fraud and high-value media for mobile user acquisition.

The list includes:



All told, these players occupy 86 spaces on the top lists. That's impressive, and what's particularly impressive is the performance of Twitter and Snap, both of which take 25 spaces each. These platforms have always been part of the mix: now, they are becoming more and more default options alongside Google and Facebook.

That said, "classic" ad networks such as Liftoff, IronSource, and Unity are doing very well indeed, showing there's still plenty of room for partners that perform. And MOLOCO had amazing results, especially in gaming and retention.

Overall industry insights

Gamified ads + loyalty network

Mistplay made the Singular ROI Index for the first time in 2021, and not just in one list. The social game discovery ad network with a loyalty and rewards program has essentially gamified ads in a platform sense as opposed to a playable ads sense. The result was impressive: they made five different lists. Advertising is a tough space right now, but this approach clearly has legs.

Mistplay has high spend and very low fraud, with good ROI.

But only a limited number of Singular customers are currently spending on the platform, suggesting that Mistplay is a hidden gem that others should consider.

BlueStacks

Speaking of platforms, BlueStacks deserves a highlight. The desktop gaming platform for Android apps got an honorable mention last year, but hit no charts. This year it's a fixture: ranking on no fewer than nine charts, including Global ROI - Android, Global ROI for Gaming - Android, and multiple others.

BlueStacks offers over a million games and has over 400 million users. It is a significant force in Android gaming – and possibly one of the reasons Apple has chosen to allow iOS apps, including games, to run on Apple silicon Macs. It's also a significant force in advertising.

Influencer marketing for mobile user acquisition goes big

Influencer marketing has been a thing for years now. But it was always challenging to measure and monitor and therefore assign ROI to. JetFuel is changing that by focusing on what it calls “direct-response influencer marketing.”

JetFuel debuts on the Singular ROI Index in three top lists, and shows that there's a path to generating and measuring growth impact for mobile user acquisition via influencer marketing.

Social stays strong

We expect Facebook to lead in the ROI Index on the social side, and it does. But Twitter did amazingly well, and so did Snap. And JetFuel, mentioned above, shows that it's not just the big platforms themselves who can be effective on social.

One key finding: retention.

Social is extremely strong at delivering users who stick. We especially saw Facebook and Twitter rank high here.

Overall industry insights

Search reporting gets harder

Google is the other perennial leader, along with Facebook, of Singular ROI Index top lists. This year Google again tied Facebook with 27 rankings in 27 opportunities.

But there have been some changes.

While we don't release specific rankings within each list, Google has dropped somewhat in the order. That's not necessarily because Google isn't working as well for mobile user acquisition: it's because there's less granular visibility into Google advertising performance on iOS. That's the continuing impact of Google expanding access to iOS search inventory in mid-2019, but the inability to provide user-level insights for that data. That does reflect, of course, a different reality on iOS than Android, and it's in some sense a minor forerunner to Apple's IDFA changes in iOS 14.

Google Ads conversion and revenue data still show up in aggregated reporting, and thanks to Singular's dual API integration we can still report on it. The difference is that a significant percentage of Google's conversions are not reported and de-duped by MMPs on a user-by-user level, which is the way we analyze data for the ROI index. Thus, a part of Google's return on advertising doesn't boost Google's rankings as much as it otherwise would.

This is something data-driven advertisers were forced to deal with in 2020, having part of their conversions counted by the self-attributing networks, but not having access to this user-level data to run their advanced internal models. It's something we see both in Google advertising on iOS and by Facebook decisions on view-through attribution.

TikTok goes global

Last year TikTok burst onto the mobile stage. But it only ranked on two lists and was still working to release significant advertiser tools. This year, TikTok is on twelve lists, including all three major regions we focus on: North America, EMEA, and APAC.

Non-gaming is the sweet spot for TikTok, with on-demand and delivery customers as well as betting customers. What we see working well on TikTok includes:

- Influencer marketing
- Native ads
- Video (of course)
- Brand (broad reach) & retail (shoppable ads)

Overall industry insights

Apple Search Ads: winning

Apple Search Ads only in 14 lists this year out of 27 possible. But that masks, of course, that the other lists are Android focused. In other words, everywhere it could rank, Apple Search Ads ranked. And not just third, or fourth, or sixth like the 2020 ROI Index. This year, Apple Search Ads ranks first in almost every list it's eligible for.

Hidden gems and honorable mentions

We give a number of honorable mentions to certain networks that almost made it into the 2021 ROI Index. These are worthy of consideration by advertisers and could make it into the Index in coming years.



(formerly Applike)

For hidden gems, a few companies we'd like to highlight include the following. These players often show great results but are sometimes overlooked:



impressive ROI on
iOS especially



hidden gem on iOS



hidden gem on Android



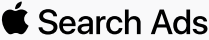
Global ROI Leaders

Global leaders overall: return on investment

iOS	Android
 AARKI	 AARKI
 AD ACTION	 AD ACTION
 ADCOLONY	 APPLOVIN
 Apple Search Ads	 ironSource Aura
 APPLOVIN	 Blind Ferret
 Chartboost	 BlueStacks
	 digital turbine
	
 FLUENT	 Fyber
	
 ironSource	 ironSource
 JetFuel	 LIFTOFF
 LIFTOFF	 MISTPLAY
 LINE Ads	 MOLOCO
 MOLOCO	
	 Tapjoy
 TikTok	 TikTok
	
 unity	 unity
 Vungle	 Vungle

Global ROI Leaders

Global leaders, gaming: return on investment

iOS	Android
 AARKI	 AARKI
 Search Ads	 APPLOVIN
 APPLOVIN	 BlueStacks
 Chartboost	 digital turbine
 f	 f
 FLUENT	
	 ironSource
 ironSource	 LIFTOFF
 LIFTOFF	 MISTPLAY
 MOLOCO	 MOLOCO
	
 Tapjoy	 Tapjoy
	
 unity	 unity
 Vungle	 Vungle

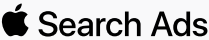
Global ROI Leaders

Non-gaming: return on investment

ios	Android
	
	
	
	
	
	
	
	
	
	

Regional ROI leaders

APAC

ios	Android
 AARKI	 AARKI
 Search Ads	 APPLOVIN
 Chartboost	 BlueStacks
	
	
 ironSource	 ironSource
 LIFTOFF	 LIFTOFF
 LINE Ads	 LINE Ads
 MoLoco	 MoLoco
	
	
	
 unity	
 Vungle	
 Zucks	 unity

Regional ROI leaders

EMEA

iOS	Android
 AARKI	 AARKI
 ADCOLONY	 APPLOVIN
 Apple Search Ads	 BlueStacks
 APPLOVIN	
 Chartboost	 Fyber
	
	 ironSource
 ironSource	 LIFTOFF
 LIFTOFF	 MISTPLAY
 MOLOCO	 MOLOCO
	
 TikTok	 Tapjoy
	 TikTok
 unity	
 Vungle	 unity

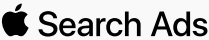
Regional ROI leaders

North America

iOS	Android
 AARKI	 AARKI
 ADCOLONY	 ironSourceAura
 Apple Search Ads	 Blind Ferret
 APPLOVIN	 BlueStacks
 Chartboost	 digital turbine
	
	
 ironSource	 ironSource
 LIFTOFF	 LIFTOFF
 MOLOCO	 MOLOCO
	
	 Tapjoy
	
 unity	
 Vungle	 unity

Global retention leaders

Overall

iOS	Android
 AARKI	 AARKI
 Search Ads	 BlueStacks
	
	
 ironSource	 ironSource
	
	
	
 unity	
 Vungle	 unity

Global retention leaders

Gaming

iOS	Android
	
	
	
	
	
	
	
	
	
	

Non-gaming

iOS	Android
	
	
	
	
	
	

Regional retention leaders

APAC

iOS	Android
	
	
	
	
	
	

EMEA

iOS	Android
	
	
	
	
	
	
	
	

Regional retention leaders

North America

ios	Android
 AARKI	 AARKI
 Search Ads	 BlueStacks
	
	
 ironSource	 ironSource
 MOLOCO	 MOLOCO
	
	
 unity	 unity
 Vungle	 Vungle

Global fraud leaders

These ad networks and platforms had the lowest fraud among companies that qualified for consideration.

Overall	iOS	Android
		
		
		
		
		
		
		
		
		
		
		
		
		
		
		

Overall best bet ad networks

36 different ad networks, platforms, and mobile marketing players achieved at least one mention in the 2021 Singular ROI Index. On 27 total lists, there are a total of 323 potential ranking positions.

Here are the top leaders:

Network	Number of top list rankings
	27
	27
	25
	25
 ironSource	22
 unity	22
 MoLoCo	21
 AARKI	17
 Vungle	15
 Apple Search Ads	14
 LIFTOFF	14
 TikTok	12
 APPLOVIN	11
 BlueStacks	10
 Chartboost	7
 Tapjoy	7
 MISTPLAY	5
 ironSource Aura	4
 Blind Ferret	4
 Fyber	4

Overall best bet ad networks

Clearly, Google and Facebook rank on all 27 possible lists: an impressive showing, but not surprising given their global positions as mobile advertising leaders. Perhaps even more impressive, Snapchat and Twitter approach the very largest mobile ad players in terms of ROI and value.

Equally impressive, ironSource, Unity, and MOLOCO rank on over two thirds of the lists. And they do so as "classic" ad networks, not as platforms that own their own supply and drive their own demand. ironSource, of course, wins twice since it also owns Aura ironSource and therefore hits the top leaders list in two places for a combined ranking on 23 unique lists out of the 27 possible.

Methodology

The Singular ROI Index ranks ad networks, so we don't include agencies or affiliate networks.

When ranking companies, we look at:

- **Spend:** must be above a specified minimum
- **Fraud rate:** must be below a maximum; penalized according to actual
- **Reach:** must be used by a significant number of Singular clients
- **CTI:** must have a low to moderate click-to-install ratio
- **ROI** (return on investment): calculated by in-app spend from acquired users
- **Retention:** percentage of users who remain active 30 days after install

Talk to a Singular expert.

We'll show you how you can get a complete view of ROI with our next-gen attribution, full-funnel marketing data, and best-in-class fraud prevention.

[Schedule a demo](#)