

## Spotlight Series: Isabel Ferreira

Welcome to the Game Changers Spotlight Series!

Here's a deeper dive on how Isabel view the current and future of the gaming market!



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### What has the impact of COVID been to the gaming and apps industry?

Gaming apps are providing users with a safe entertainment space while they're locked at home, so it's no wonder that the numbers have been rising:

**Installs have increased:** Gaming saw a 132% increase in installs in the last week of March 2020 vs March 2019 and a 75% increase in installs in Q1 2020 vs Q1 2019.

At a time when people are separated from their families and have a huge need to stay connected, companies like Marmalade Games that own IPs like Monopoly saw a massive rise in organics.

Hypercasual games global app installs increased by 103% between December 2019 and March 2020 and the percentage of paid installs decreased from 80% to 52%. This suggests hypercasual gaming companies are utilising the power of cross-promo effectively.

**Retention is up:** Not only have installs increased, so have app engagements.

Hypercasual games saw an increase of 72% in sessions in March 2020 when compared to December 2019. In terms of regions, China led the pack with an increase of 300%, Germany saw a 69% increase, Korea 152% and Japan 137%.

Players spend 57% more time in midcore titles than casual games. Casual games do drive more Downloads but midcore games are stickier.

Overall only 2% of players stay engaged. When players are gone, they are usually gone for good (only 3% come back through retargeting). Hence, messaging needs to be aimed at current and new players not lapsed ones. Displaying related creatives as soon as a player finishes one level in the game is likely to help increase app stickiness.

**CPIs are down:** Global CPIs were much lower during lockdown with some verticals highly affected by the pandemic (e.g. travel and sports) pausing spend completely.

Although CPIs are 70% higher for RPG on iOS than Hypercasual, its Conversion rates have increased - 37% higher than Action and 124% higher than Adventure..

**Product, messaging, creatives:** Gaming companies around the world had to adapt their strategies to the 'new normal'.

For example, Supersonic Studios, a hypercasual gaming studio who successfully published 7 games to the top of the charts during COVID-19, took into account the fact that players were no longer commuting to work so they launched a relaxation game that became very successful.

Similarly, Popcore (a hypercasual gaming studio) focused on developing more engaging mechanics in their new games and improving existing games by releasing additional features to increase their retention. The longer players stay, the more ads they'll watch.

Additionally, Hypercasual gaming companies started cross-promoting their games as soon as a new player enters their game to keep that player engaged and involved. Keeping an open communication is key and AB testing different messaging is as important.

In fact, we saw MAG Interactive changed the game mechanics of Word Domination to help one of their players proposed to his partner during this pandemic.

## What do you think the long term impact will be? (due to economic recession / populism / etc.)

The current situation could see an acceleration to a more app-focused world as the effects of COVID-19 have really highlighted how important and useful apps are. This includes, keeping communications between people, entertainment (gaming and streaming), ordering food etc.

The flexibility of the app ecosystem and the importance of mobile technology in keeping people connected can really make a difference in people's lives. Case in point: the COVID-19 tracking apps. Although these have achieved various degrees of successes depending on country, there's a reason why apps have largely been regarded as the best channel to build this infrastructure in.

More generally, the long term impact on the app ecosystem across the different verticals will largely be determined by how soon life can return to normal. In EMEA, for example, we've already seen that use of travel apps is slowly creeping back up as lockdowns lift.

## How would you suggest games publishers / developers treat user acquisition in this time period? What would your strategies be?

Given the uncertainty of the future, keeping your strategy dynamic and fast reactive will be key and we see our clients utilising **automation in AB testing**.

Mobile ads are not exciting anymore: everyone has seen hundreds of them. Everyone has heard the same promises, so make sure your **message is unique** to your app and relevant to the audience you're targeting.

Finally, nothing keeps a gamer hooked like a quality game. Observe where in your game your best LTV users tend to churn, and **feedback into product**.

## What are your thoughts on the impact of IDFA to games developers / publishers?

Adjust has been working closely with Apple and other industry leaders (clients, partners and competitors alike) in finding a solution to help our industry navigate Apple's iOS 14 Privacy Update smoothly.

Both Adjust and Apple share a common mission to protect user data and keep it safe.

Adjust Solution: The Attribution Hash:

First, ad publishers (the source app) will need to communicate clearly with their customers the value of serving them targeted ads. They can incentivize user consent via push notifications and send these at different times as well. For example: by offering users a choice between a free ad supported version and a paid ad free version of the app. Once the user agrees, then serve them the one time apple consent form.

Accordingly to Apple's AppTrackingTransparency framework: users can be tracked without obtaining permission through ATT when the user or device data is not sent off the device in a way that can identify the user and the device.

So once opened, the advertiser's app (targeted app) reads the IDFA and the IDFV, then it calculates a secure hash of these to something we call attribution hash. This hash will never be the same between two different apps on the same device, unless from the same app publisher (like IDFV).

The MMP calculates the secure hash (SHA256) of each potential matching IDFA collected in the ad publishing app (who got consent from the user). If one of the hashes matches the attribution hash, then they can attribute almost as they would with IDFAs today.

Without a user approved IDFA from the ad publisher, the MMP can fallback to fingerprinting for attribution.