



Insights into Marketing Trends in Southeast Asian Mobile Games in 2024



With SocialPeta, you can spy on your competitors' ad data, and get ad data from networks, media, and advertisers around the world to inspire you. SocialPeta covers more than 70 countries/regions and over 80 well-known ad channels worldwide, such as Facebook, Twitter, YouTube, TikTok, and Unity. We provide nearly 1.6 billion ad creatives, updating millions each day. Through **duration, impressions, popularity, and interactions**, we can quickly locate the active high-quality creatives which will be provided to you in real time to help with your marketing plan.

As one of the world-leading advertising and marketing platforms, SocialPeta boasts a huge database and the experience of working with thousands of game companies and providing mobile game workers with more practical methods in order to develop more popular games.

6M

APP Advertisers

1.6B

APP Ad Creatives

1.20M

Daily Updates

Website: www.socialpeta.com

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Insights into Overall Marketing Trends in Southeast Asian Mobile Games in 2024

Overall Marketing Trends in Southeast Asian Mobile Games

2024 saw over 20K mobile game advertisers in Southeast Asia. In June, new advertisers surged to account for 8.5%.

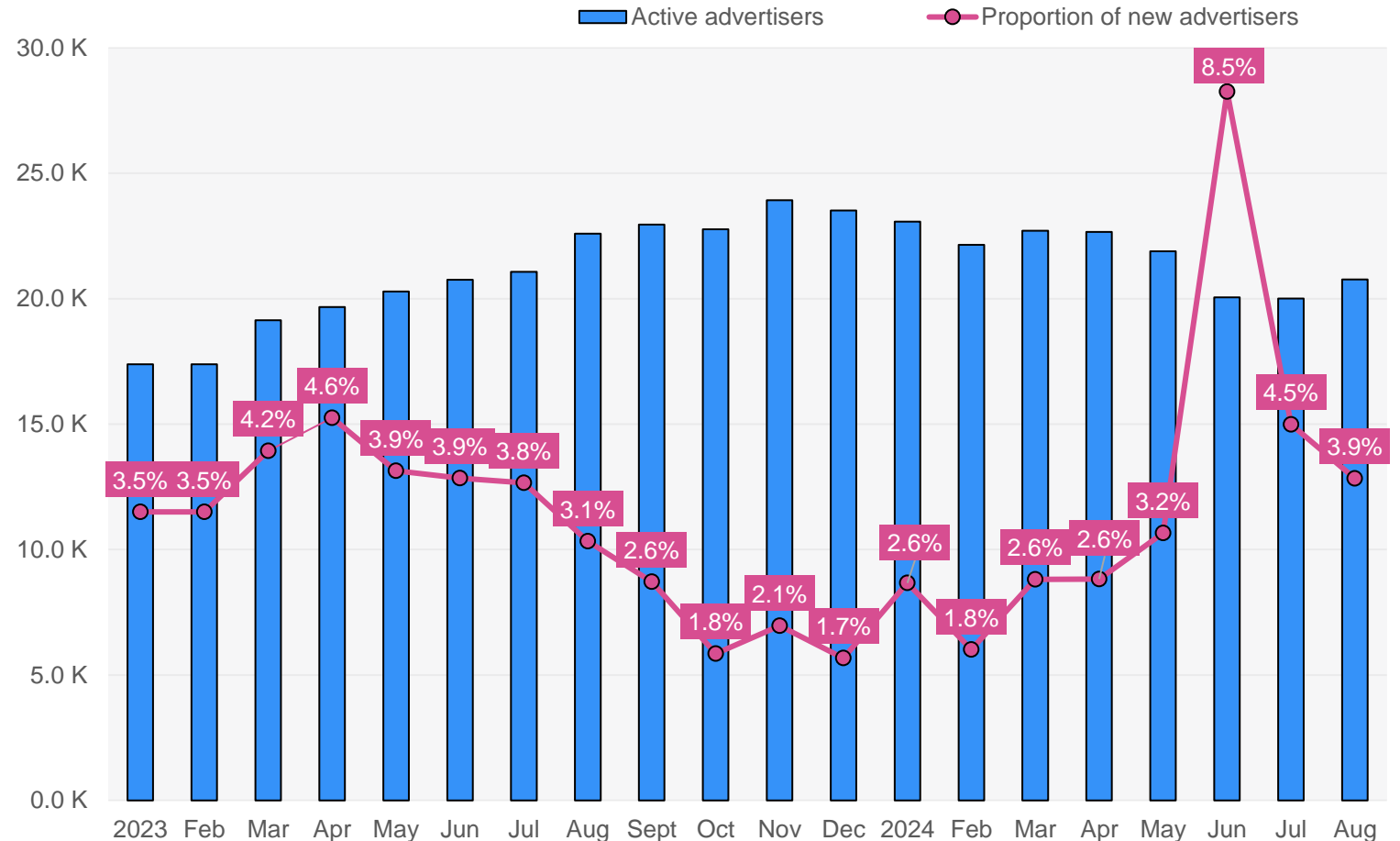
- Southeast Asia recorded over 21K monthly mobile game advertisers this year, and over 20K active mobile game advertisers each month throughout the year. But, there was a significant decline in the active mobile game advertisers in June and July this year.
- Monthly new advertisers accounted for 3.7% in Southeast Asia in 2024, declining 0.1 percent from the same time the year before. The lowest proportion of new products is always reported in the Spring Festival month (Jan. 2023, Feb. 2024) of the year. New products soared in June this year, and new game advertisers accounted for 8.5%.

Monthly active advertisers in 2024

21.6 K YoY 9.5%↑

Proportion of monthly new advertisers in 2024

3.7% YoY 0.1%↓



Trends of New Ad Creatives for Southeast Asian Mobile Games

Southeast Asia recorded a small surge of monthly advertisers with new creatives in July and August. There was a slight increase in the proportion of monthly new creatives in 2024.

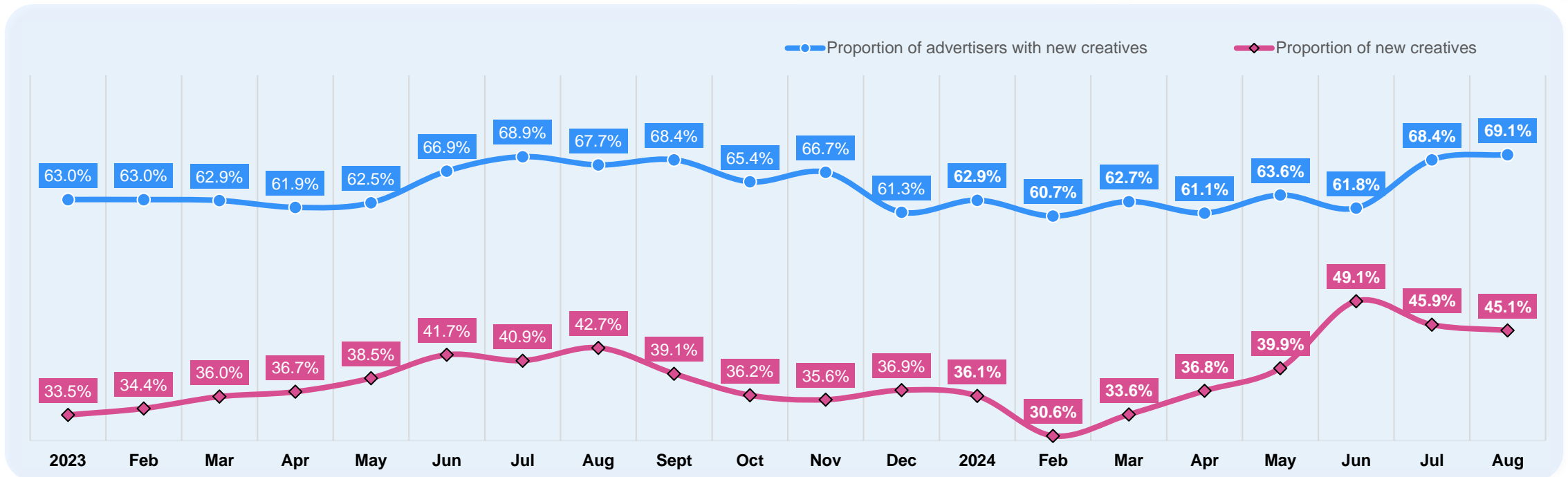
- Averagely 63.8% of advertisers released new ad creatives every month in 2024 in Southeast Asia, representing a slight drop of 0.8% YoY. There was a significant increase in the proportion of monthly advertisers with new creatives in July and August.
- In Southeast Asia, monthly new creatives accounted for 39.6% this year, up 1.5% YoY. The proportion peaked at 49.1% in June, and dropped to around 45% in July and August.

63.8% YoY: 0.8%↓

Monthly advertisers with new creatives in 2024

39.6% YoY: 1.5%↑

Proportion of monthly new creatives in 2024

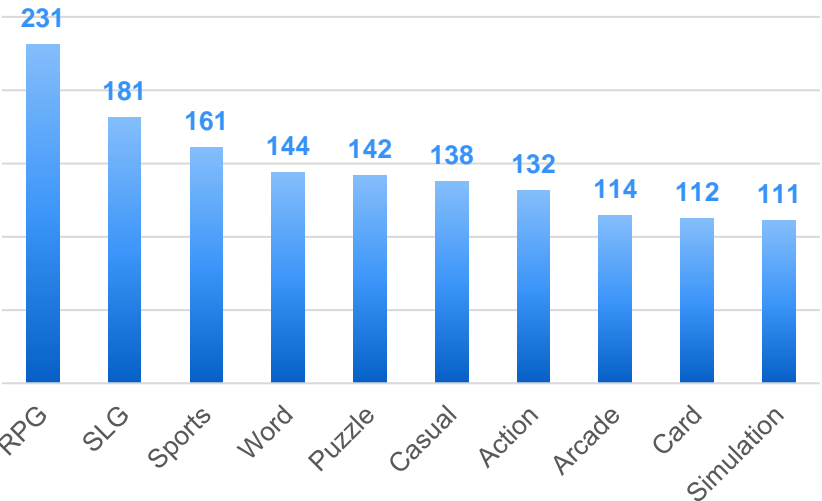


Advertising Analysis of Southeast Asian Mobile Games by Genre

In Southeast Asia, RPG became the most active genre in terms of marketing, because RPGs had the highest number of monthly creatives and a proportion of creatives that was 3.8 percent higher than the global figure.

- Casual, casino, and puzzle games had the highest proportions of advertisers. Among them, casual game advertisers accounted for 28.4% of all mobile game advertisers in Southeast Asia, 1.4% higher than the global figure.
- In Southeast Asia, RPGs were the most active in marketing, ranked No. 2 with RPG creatives accounting for 16% of total creatives, 3.8% higher than the global figure. Meanwhile, RPGs released 231 monthly creatives, 50 creatives more than SLGs that were ranked No. 2.

Monthly creatives of mobile games by genre in Southeast Asia



| Genre | Advertisers (%) | In comparison with global data | Genre | Creatives (%) | In comparison with global data |
|------------|-----------------|--------------------------------|------------|---------------|--------------------------------|
| Casual | 28.4% | 1.4% | Casual | 29.6% | -1.9% |
| Casino | 13.9% | -0.7% | RPG | 16.0% | 3.8% |
| Puzzle | 11.3% | -1.3% | Puzzle | 10.7% | -1.6% |
| Simulation | 9.5% | 0.9% | SLG | 8.6% | 1.7% |
| Action | 7.0% | 0.5% | Simulation | 7.9% | 0.1% |
| RPG | 7.0% | 1.1% | Action | 6.7% | 0.6% |
| SLG | 4.7% | 0.4% | Casino | 5.7% | 0.5% |
| Adventure | 3.4% | -0.1% | Adventure | 3.2% | -0.2% |
| Card | 2.9% | -0.1% | Card | 3.1% | -0.5% |
| Arcade | 2.5% | -0.6% | Arcade | 1.7% | -1.0% |

Analysis of Advertising in Countries/Regions in Asia Pacific

Southeast Asia's marketing effort was less than that of Japan, South Korea, Hong Kong, Macao, and Taiwan this year. Indonesia recorded the highest number of monthly advertisers, while Thailand the highest number of monthly creatives.

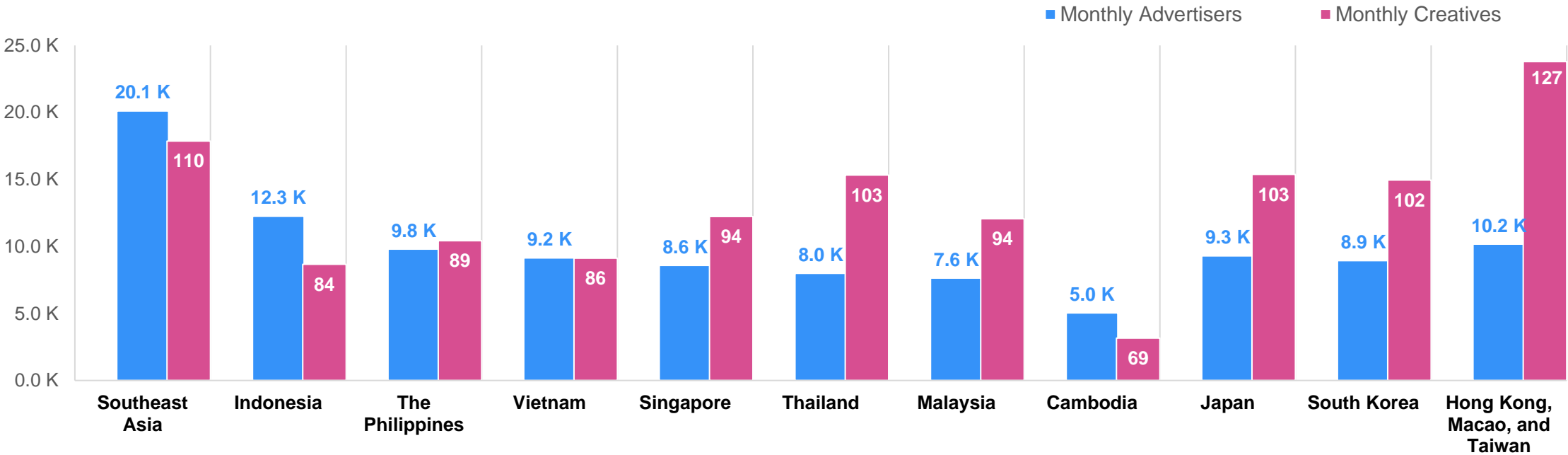
- Indonesia and the Philippines had more monthly advertisers than Japan and South Korea.
- Except for Thailand and Japan, All the other countries in Southeast Asia had less than 100 monthly creatives.

Monthly advertisers in Southeast Asia: 20.1K

Indonesia had the most advertisers, 12.3K, followed by the Philippines and Vietnam. Indonesia and the Philippines had more active advertisers than Japan and South Korea.

Monthly creatives in Southeast Asia: 110

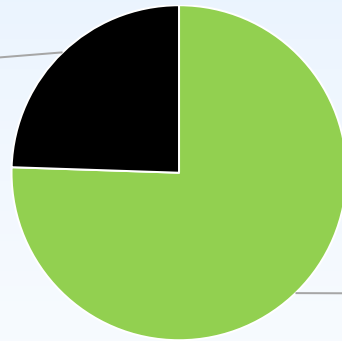
Thailand was the only country that had over 100 monthly creatives, followed by Singapore and Malaysia that both had 94 monthly creatives.



Marketing Analysis of Southeast Asian Mobile Games on iOS and Android

iOS advertisers accounted for less than 25%. In Indonesia, iOS advertisers accounted for less than 20%. Image creatives on iOS accounted for nearly 30%.

iOS
24.5%

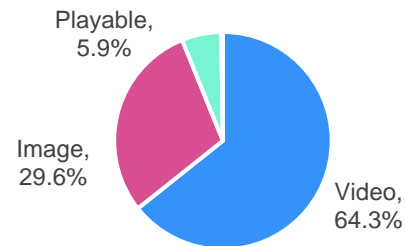


Android
75.5%

iOS Advertisers

Monthly advertisers: **4.6K**

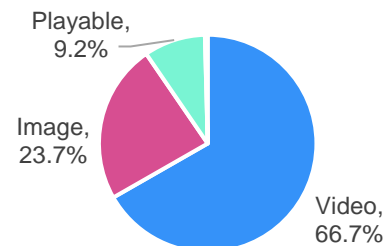
Proportion of monthly new creatives: **47.8%**



Android Advertisers

Monthly advertisers: **11.9K**

Proportion of monthly new creatives: **45.6%**



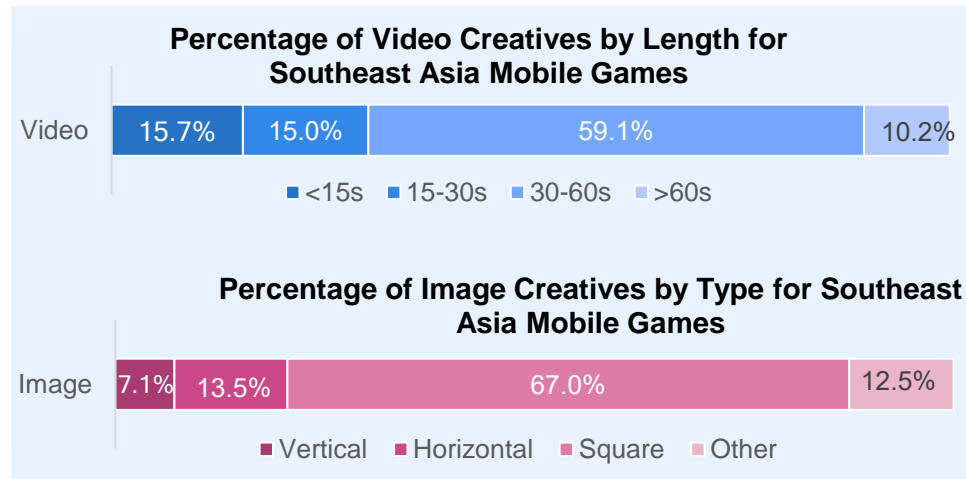
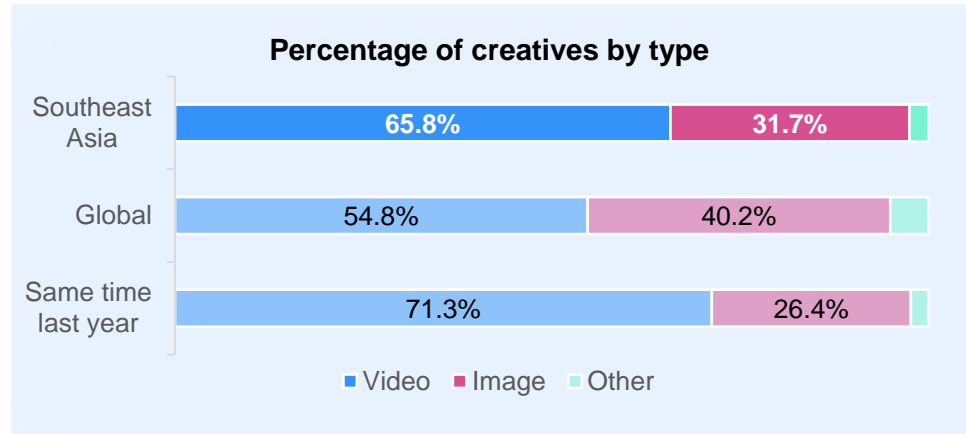
Percentages of Mobile Game Advertisers in Top Countries/Regions in Asia Pacific on iOS and Android

- In Indonesia, iOS advertisers accounted for less than 20%. In Cambodia, iOS advertisers had the highest proportion of 34.4%.
- In Southeast Asia, iOS and Android reported similar proportions of new creatives, with a slightly bigger proportion on iOS. There was a relatively bigger proportion of image creatives on iOS.

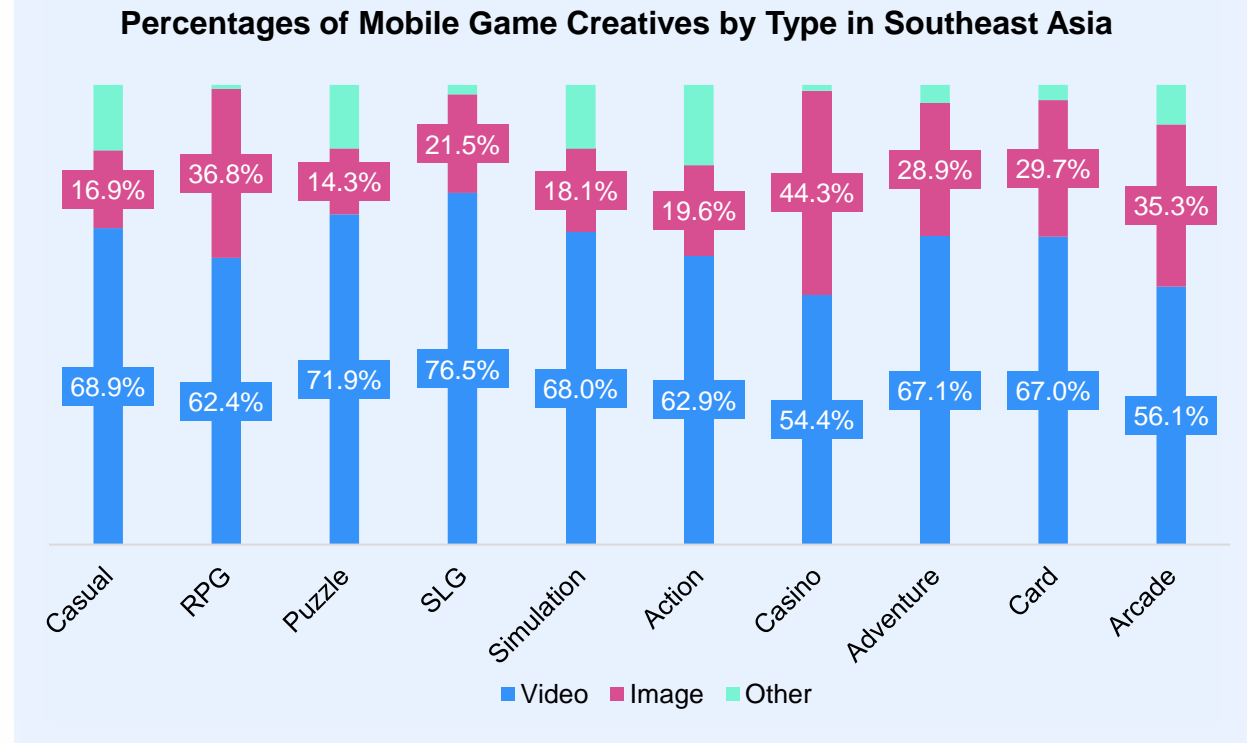
| | | |
|-------------|-------|-------|
| Indonesia | 19.9% | 80.1% |
| Thailand | 29.7% | 70.3% |
| Vietnam | 32.7% | 67.3% |
| Singapore | 33.9% | 66.1% |
| Thailand | 31.9% | 68.1% |
| Malaysia | 32.4% | 67.6% |
| Cambodia | 34.4% | 65.6% |
| Japan | 31.8% | 68.2% |
| South Korea | 32.5% | 67.5% |
| Hong Kong | 33.8% | 66.2% |

Analysis of Mobile Game Creatives by Type in Southeast Asia

Creatives were mainly videos, of which nearly 70% were videos of more than 30 seconds. SLGs had the biggest proportion of video creatives. Casino games had the biggest proportion of image creatives.



- ✓ In Southeast Asia, the proportion of video creatives was 11% higher than the global figure, declining 5.5% from the same time last year.
- ✓ SLGs had the biggest proportion of video creatives, 76.5%. Casino games had the biggest proportion of image creatives, 44.3%.











































02

Top 20 Southeast Asian Mobile Games by Advertising & Excellent Ad Creatives

TOP 20 Southeast Asian Mobile Games by Advertising in 2024



| iOS | | | | Android | | | |
|-----|---|------------------------------------|-------------------|---------|---|----------------------------------|-------------------|
| 1 |  | Pesta Ludo: Permainan Papan | Cavaco Broka | 11 |  | 了不起的AI修仙 | Wonder Game |
| 2 |  | Draconia Saga | Zlongame | 12 |  | 新武俠大明星 | 喬歲數位 |
| 3 |  | Legend of Mushroom: Rush | 4399 | 13 |  | Hello Café: Cafe Impianmu | VNG |
| 4 |  | Ancient Seal: The Exorcist | Xsuper Gamer | 14 |  | Frost & Flame | FunPlus |
| 5 |  | Braindom | Matchingham Games | 15 |  | Ghost Story: Love Destiny | VNG |
| 6 |  | Dragon Cape Adventure | Century Games | 16 |  | Brain Who? | Matchingham Games |
| 7 |  | Hero Clash | Bingchuan Network | 17 |  | AFK Journey | Lilith Games |
| 8 |  | Riddle Test | Kidding Box | 18 |  | Kingdom Go! | Bingchuan Network |
| 9 |  | Hero Wars | Nexters | 19 |  | IDLE GOG VN | Hong Ha Games |
| 10 |  | 仙劍奇俠傳：新的開始 | Kingnet | 20 |  | City Arena | 7 PIRATES GAMES |
| 1 |  | Bắn Cá Vui | HomeLand Tongits | 11 |  | Epic Heroes | Bingchuan Network |
| 2 |  | Braindom | Matchingham Games | 12 |  | The Grand Mafia | Yotta Games |
| 3 |  | Draconia Saga | Zlongame | 13 |  | Draconia Saga VN | RedRiver Game |
| 4 |  | Legend of Mushroom: Rush | 4399 | 14 |  | Block Blast! | Hungry Studio |
| 5 |  | Ancient Seal: The Exorcist | Xsuper Gamer | 15 |  | Mafia City | Yotta Games |
| 6 |  | Lords Mobile | IGG | 16 |  | Kingdom Go! | Bingchuan Network |
| 7 |  | Build Master | OneFun | 17 |  | Viking Rise | IGG |
| 8 |  | Hero Clash | Bingchuan Network | 18 |  | Omniheroes | OmniDream Games |
| 9 |  | Sky Utopia | JunHai Games | 19 |  | 封神异世录 (国际版) | JunHai Games |
| 10 |  | Doomsday | IGG | 20 |  | Brain Who? | Matchingham Games |

Source: SocialPeta - APP Intelligence, Advertiser Analysis; advertisers are sorted (from high to low) by the numbers of their deduplicated creatives within the date range.
Date Range: Jan. 2024 - Aug. 2024;

Popular Creatives for Southeast Asian Mobile Games: Mini-games as Ad Creatives

After Hong Kong, Macao, and Taiwan, Southeast Asia was an important market for minigames going global. Many classic marketing patterns in China can be used in Southeast Asia.

Click the image to play the complete creative



Piggyback on IPs



AI Filter



Mini-game + Oral advertising



KOL commentary + In-game scenes

Popular Creatives for Southeast Asian Mobile Games: MMORPG

As the most popular game genre in Southeast Asia, MMO games were the most in number and experienced the fiercest competition in media buying.

Click the image to play the complete creative



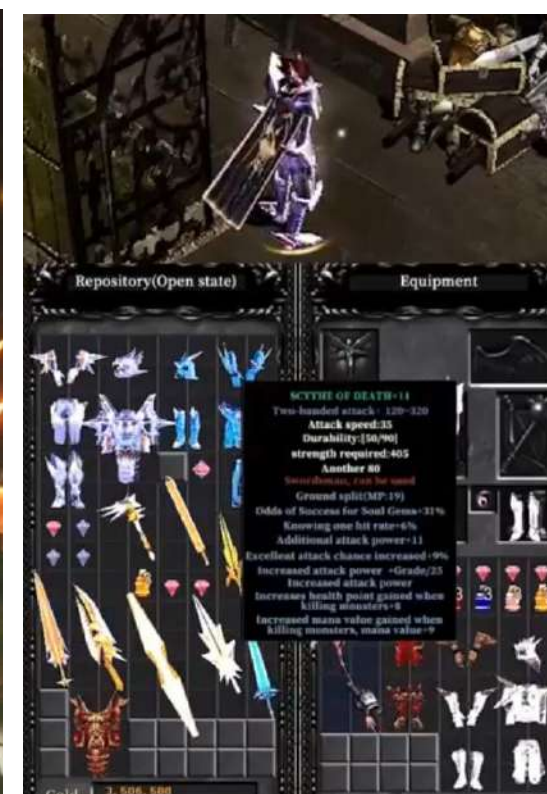
**AI-generated
animated images**



**Beautiful Login
screen**



**Combine with the
currently popular games**



Nostalgic elements

Popular Creatives for Southeast Asian Mobile Games: **Live-action Creatives**

Ad creatives with real people are more popular in Southeast Asia. In Vietnam and Thailand, local publishers also released many high-quality ad creatives with real people.

Click the image to play the complete creative



**Oral advertising by
real people**



**Cosplayer,
costumes, makeup**



**In-game scenes
and reality**



**Live streaming of
KOL**

03

Marketing Analysis of Top Mobile Games in Southeast Asia

Marketing of Popular Mobile Games in the SEA: Local Publisher of Games Going Global

The Southeast Asian version of 倩女幽魂, published by the Southeast Asian company VNG and launched on 22 August.

Ghost Story: Love Destiny

Xianxia MMO VNG

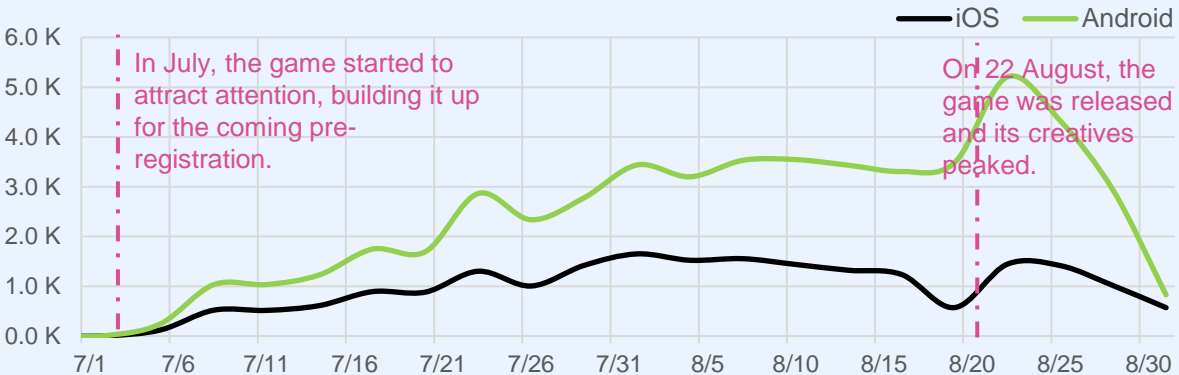
Advertising Data

First advertising date: May 2024

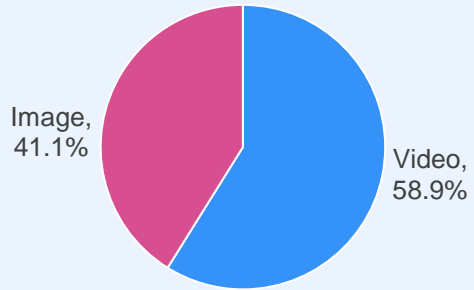
Total deduplicated creatives: 14.0K



The game's ad creatives released on iOS and Android



% of creatives by type



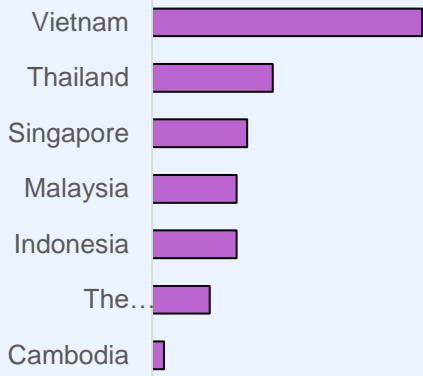
Resolution of the most video creatives:

720 * 720

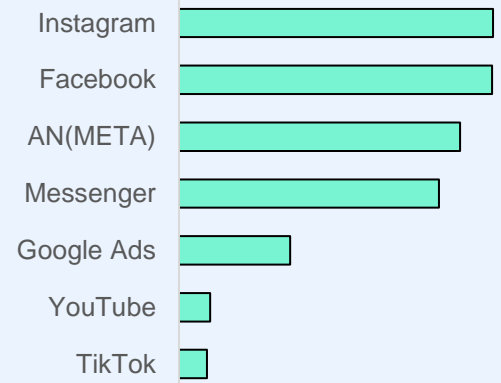
Resolution of the most image creatives:

1200 * 1200

Top 10 countries/regions by advertising



Top advertising platforms



Ghost Story: Love Destiny's Excellent Active Ad Creative



Released on:  YouTube

Estimated Impressions: 925.1K

Features: The creative starts with an in-game character, showing how exquisite the in-game character modeling is. The BGM was selected from the hot songs on TikTok and other short-video platforms. The creative was edited to sync with the beats of the music, making it look dynamic and pumped.

28.7K

Likes

4.0K

**Estimated
Conversions**



Click the image to play the complete creative

Marketing of Popular Mobile Games in the SEA: Minigames Going Global

The best minigame going global in 2024, it had entered the market of Hong Kong, Macao, and Taiwan, the Japanese market, the South Korean market, and the Southeast Asian market one after one.

Legend of Mushroom: Rush - SEA

Minigames going global 4399

Advertising Data

First advertising date: Jan. 2024

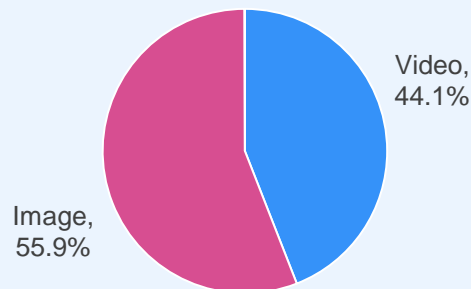
Total deduplicated creatives: 24.9K



The game's ad creatives released on iOS and Android



% of creatives by type



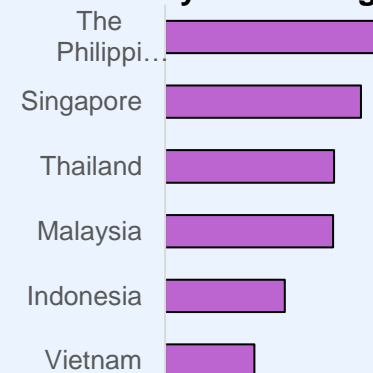
Resolution of the most video creatives:

720 * 1280

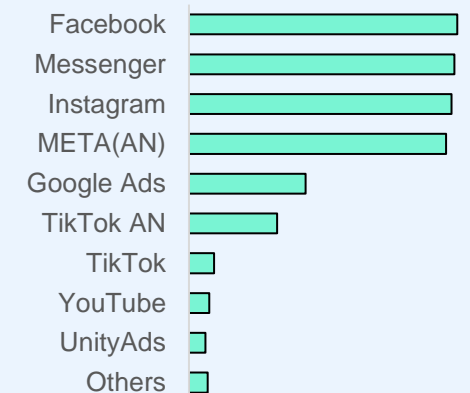
Resolution of the most image creatives:

1200 * 1200

Top 10 countries/regions by advertising



Top advertising platforms



Legend of Mushroom: Rush's Excellent Active Ad Creative



Released on:  YouTube

Release date: 2 June, 2024

Features: The creative starts with a wanted poster and Thai female singer Jannine, an imitation of a scene in the popular anime “One Piece”. Celebrity or KOL endorsement is the fastest way for games to find inroad into local markets. The endorser advertises the game orally, making the creative more convincing.

319.0K

**Estimated
Impressions**

11.2K

Likes



Click the image to play the complete creative

The Game with Greatest Advertising Effort in the SEA

It was the game with the greatest advertising effort in Southeast Asia in the second half of this year. There were over 40K deduplicated creatives in 4 months, of which AI creatives accounted for a large proportion.

Draconia Saga

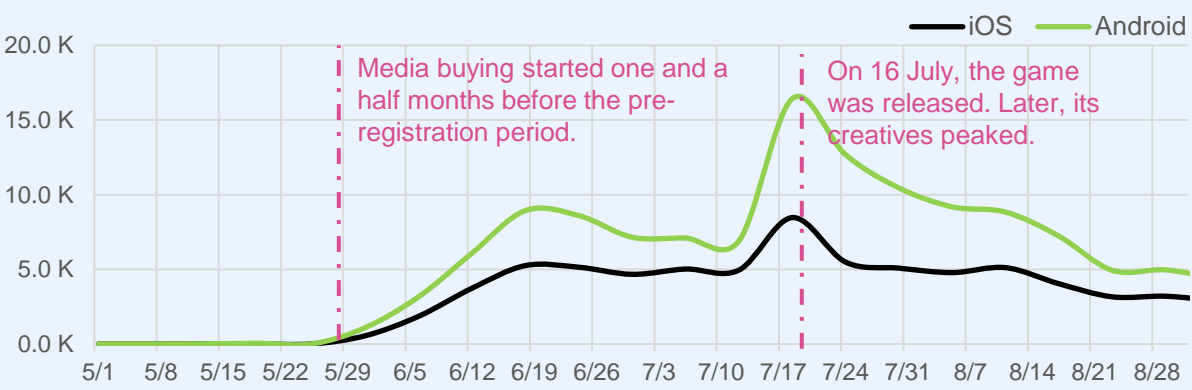
Cartoon & Fantasy MMO Zlongame

Advertising Data

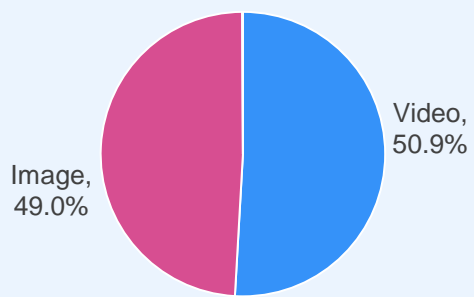
First advertising date: April 2024
Total deduplicated creatives: 41.7K



The game's ad creatives released on iOS and Android



% of creatives by type



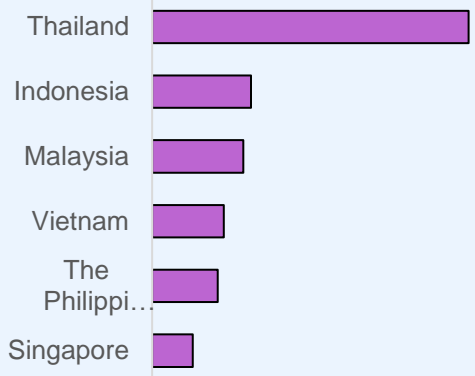
Resolution of the most video creatives:

1280 * 720

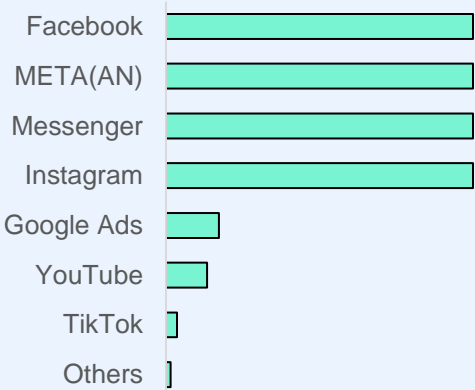
Resolution of the most image creatives:

1200 * 628

Top 10 countries/regions by advertising



Top advertising platforms



Source: Advertising data were from SocialPeta – Advertiser Analysis; the advertising audience data are summarized data and only for your information.
Date Range: May 2024 - Aug. 2024

Draconia Saga's Excellent Active Ad Creative



Released on: Audience Network

Duration: 60+ days

Features: The creative shows a KOL playing the game and some in-game scenes. It gained the highest popularity among other creatives for the game recently. From creatives of KOLs playing a game, people can learn about the actual quality of the game, and local KOLs can attract their fans to play the game. Good KOLs can even make the game a sensation before it's published.

534.4K

Estimated Impressions

461

Popularity



Click the image to play the complete creative

Declaration

1. Data Sources

With the assistance of the world's biggest advertising intelligence and analysis tool, SocialPeta Data Team has provided you with insights into the mobile advertising data of global game market. We collect advertising data by sampling worldwide, covering over 70 channels and nearly 80 countries and regions worldwide, and have captured a total of over 1.6 billion advertising data, with over 1 million ad data being updated by the hour each day. Based on such huge data, we can gain insights into the advertising market trends.

2. Data Cycle and Indicators

Overall date range of the report: Jan – Aug 2024

For specific data indicators, please see the notes on each page.

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JP & ROK: Japan, South Korea

China's HK, Macao & TW: Hong Kong (China), Macao (China), Taiwan (China)

Southeast Asia: Thailand, Indonesia, Singapore, Malaysia, Vietnam, Philippines, Cambodia

Oceania: Australia, New Zealand

South Asia: India, Pakistan

Middle East: Bahrain, Qatar, Saudi Arabia, UAE, Azerbaijan, Lebanon, Kuwait, Israel, Oman, Iraq, Morocco

South America: Brazil, Chile, Argentina, Colombia, Peru, Venezuela, Paraguay

Africa: Egypt, Kenya, Nigeria, Angola, South Africa, Algeria, Libya, Senegal, Ivory Coast



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