



The State of Mobile Game Advertising 2021

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An Analysis of U.S. Mobile Game
Advertising Trends in 2021



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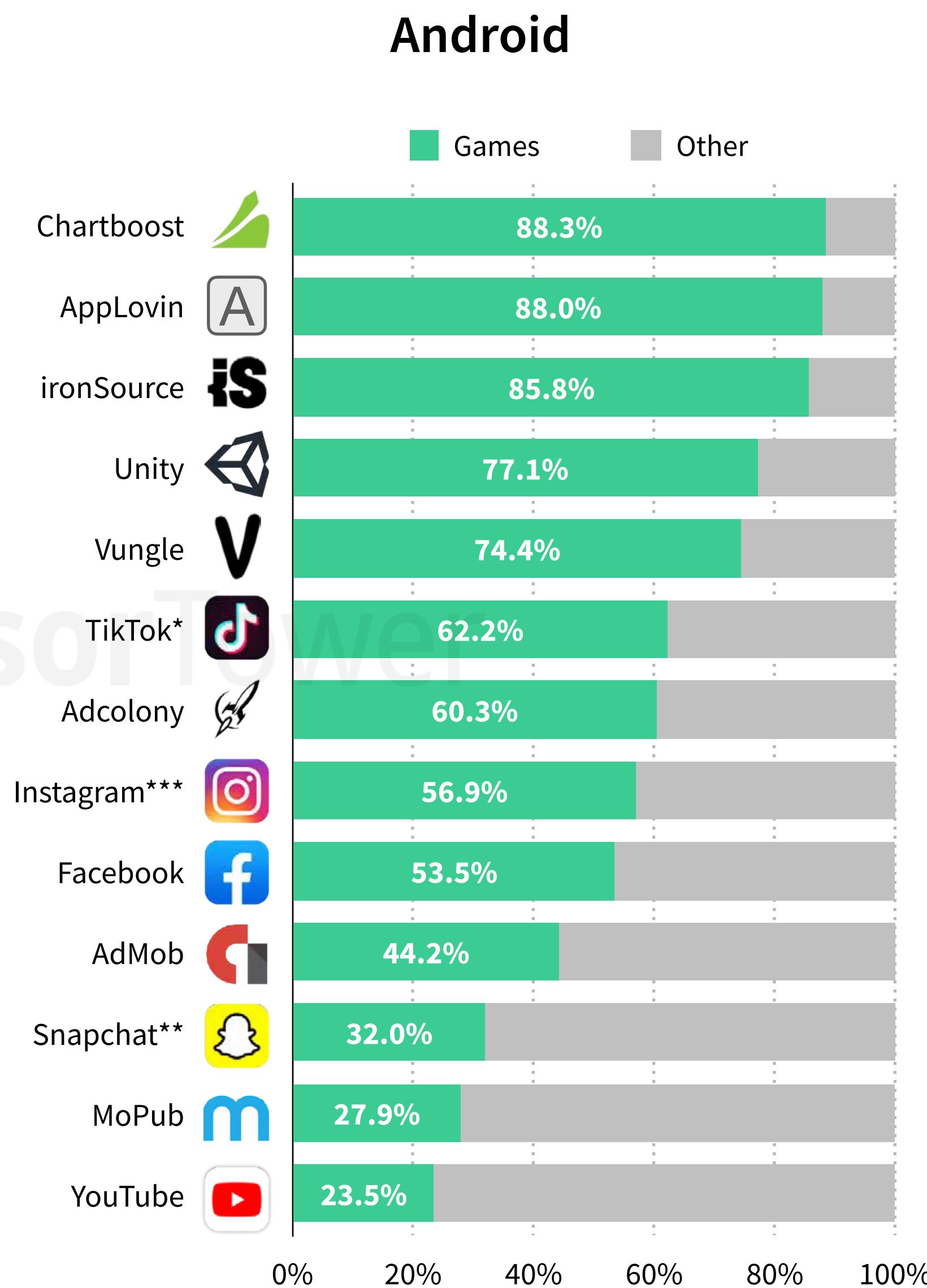
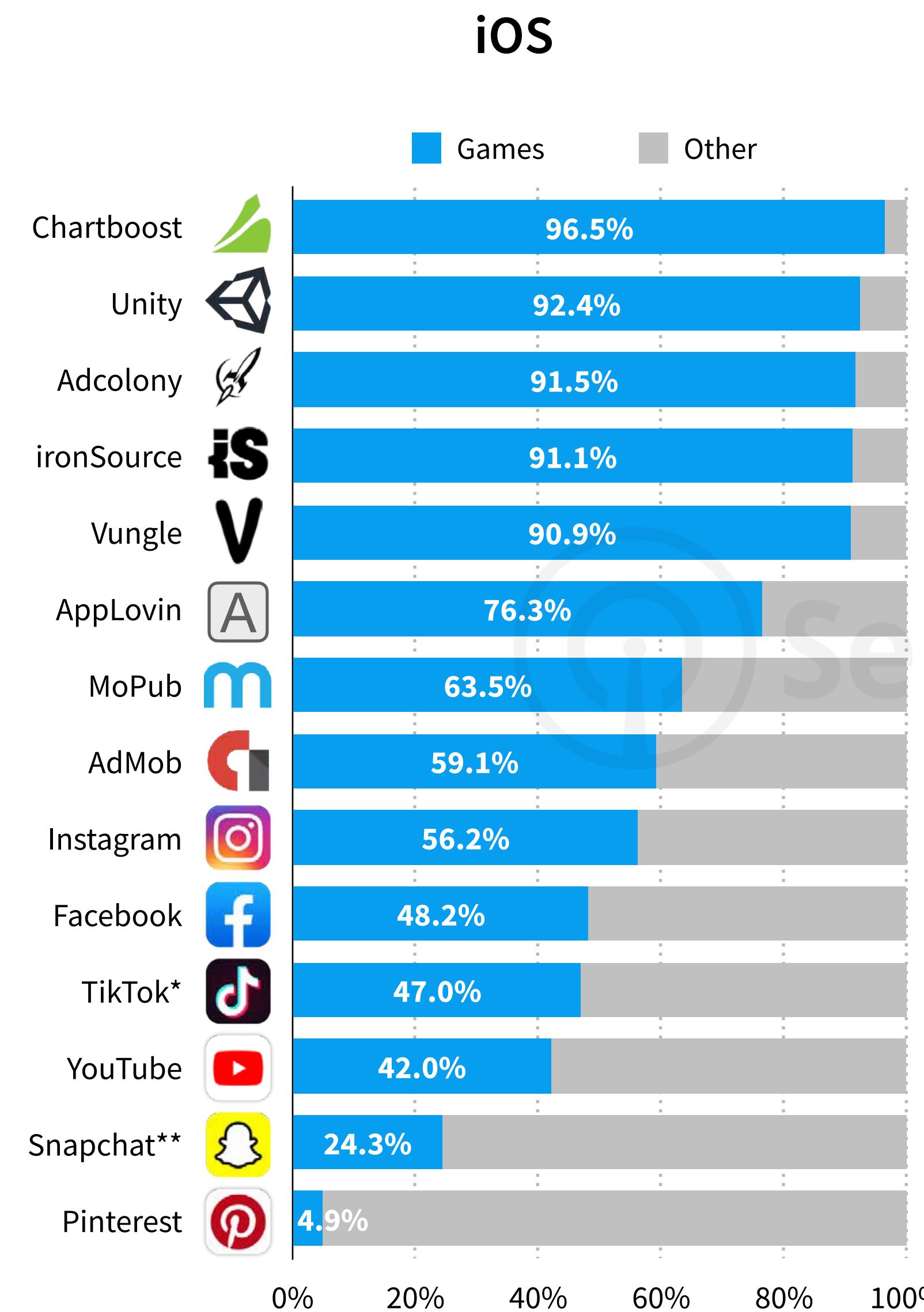
Ad Network Trends: United States

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Game Advertising Trends by Ad Network



Five Ad Networks Lead the Way by Game Share of Voice

U.S. share of voice for mobile games vs. non-game apps by ad network, 1Q18 to 1Q21



Five ad networks were primarily focused on mobile games and had at least 90 percent of their share of voice (SOV) come from games on the App Store. AppLovin has also had more than 90 percent iOS SOV from games since the beginning of 2019.

Another five networks had a more even split between gaming and non-gaming. AdMob, Instagram, Facebook, TikTok, and YouTube had between 40 and 60 percent SOV from games. While these networks serve a substantial number of non-game ads, they remain an important option for mobile games as well.

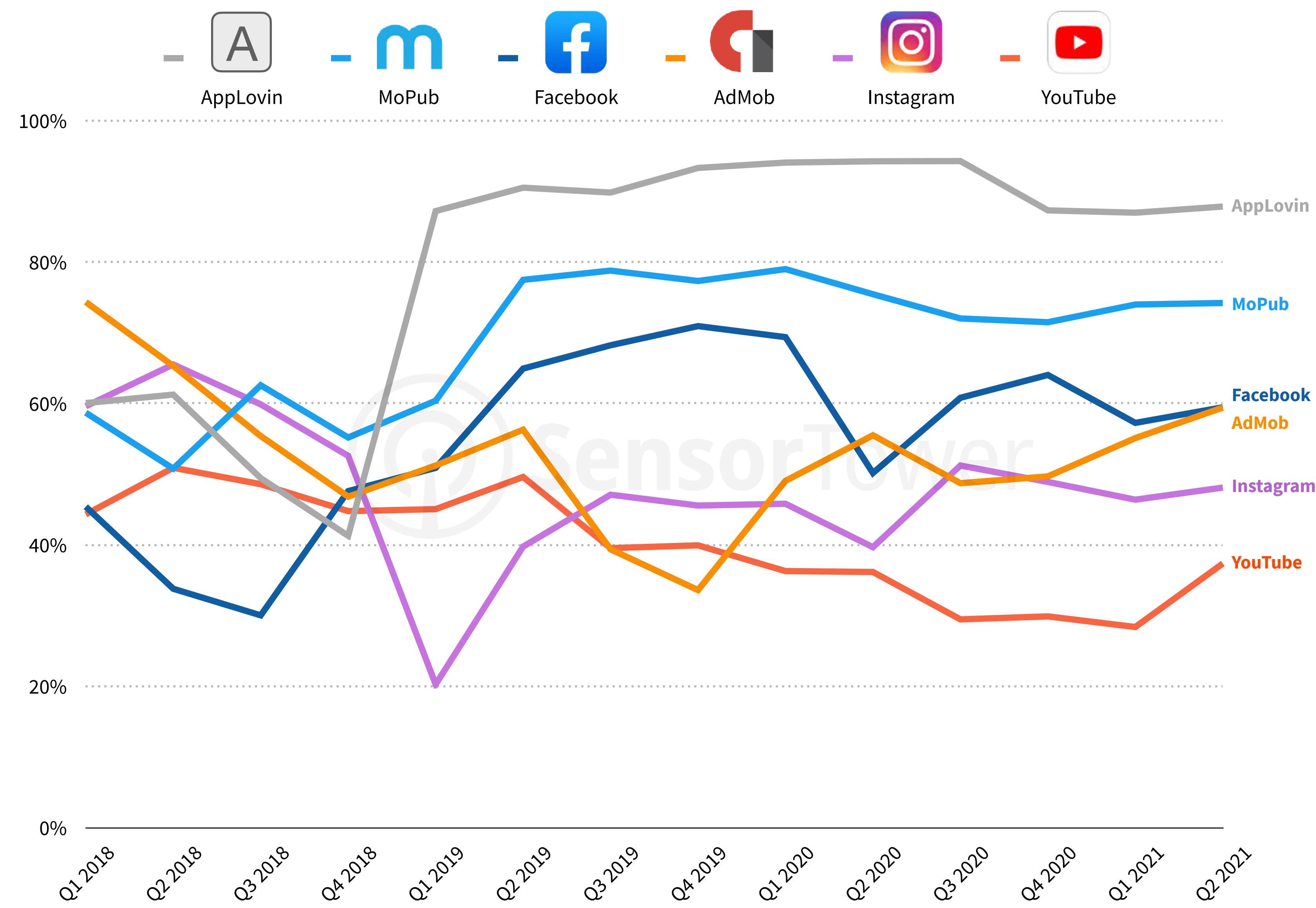
*TikTok share of voice includes data since Q4 2019

**Snapchat share of voice includes data since Q1 2019

***For Android, Instagram share of voice includes data since Q1 2019

AppLovin and MoPub Have Shifted Towards Gaming

Quarterly U.S. iOS share of voice from mobile games by ad network, 1Q18 to 2Q21

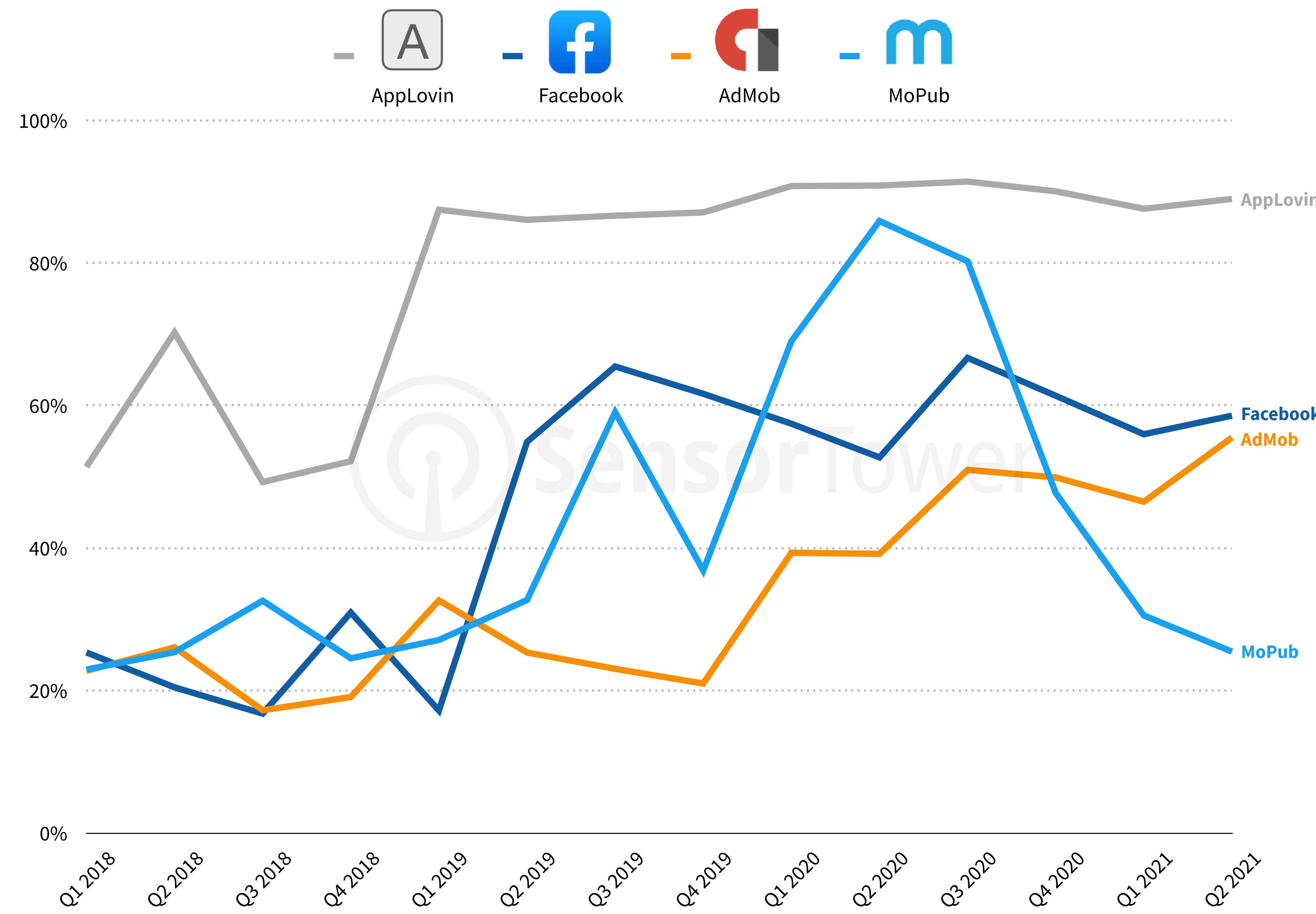


AppLovin transitioned towards being much more focused on game advertisements at the start of 2019. This corresponded with its investment in mobile game developers such as PeopleFun, Firecraft Studios, and Belka Games, in addition to its own game publishing wing, Lion Studios.

MoPub and Facebook have also become more gaming-focused since 2018. Meanwhile, YouTube has seen SOV from games gradually decline in recent years before an uptick in 2Q21.

AdMob Game Advertising Trending Up for Google Play Titles

Quarterly U.S. Android share of voice from mobile games by ad network, 1Q18 to 2Q21

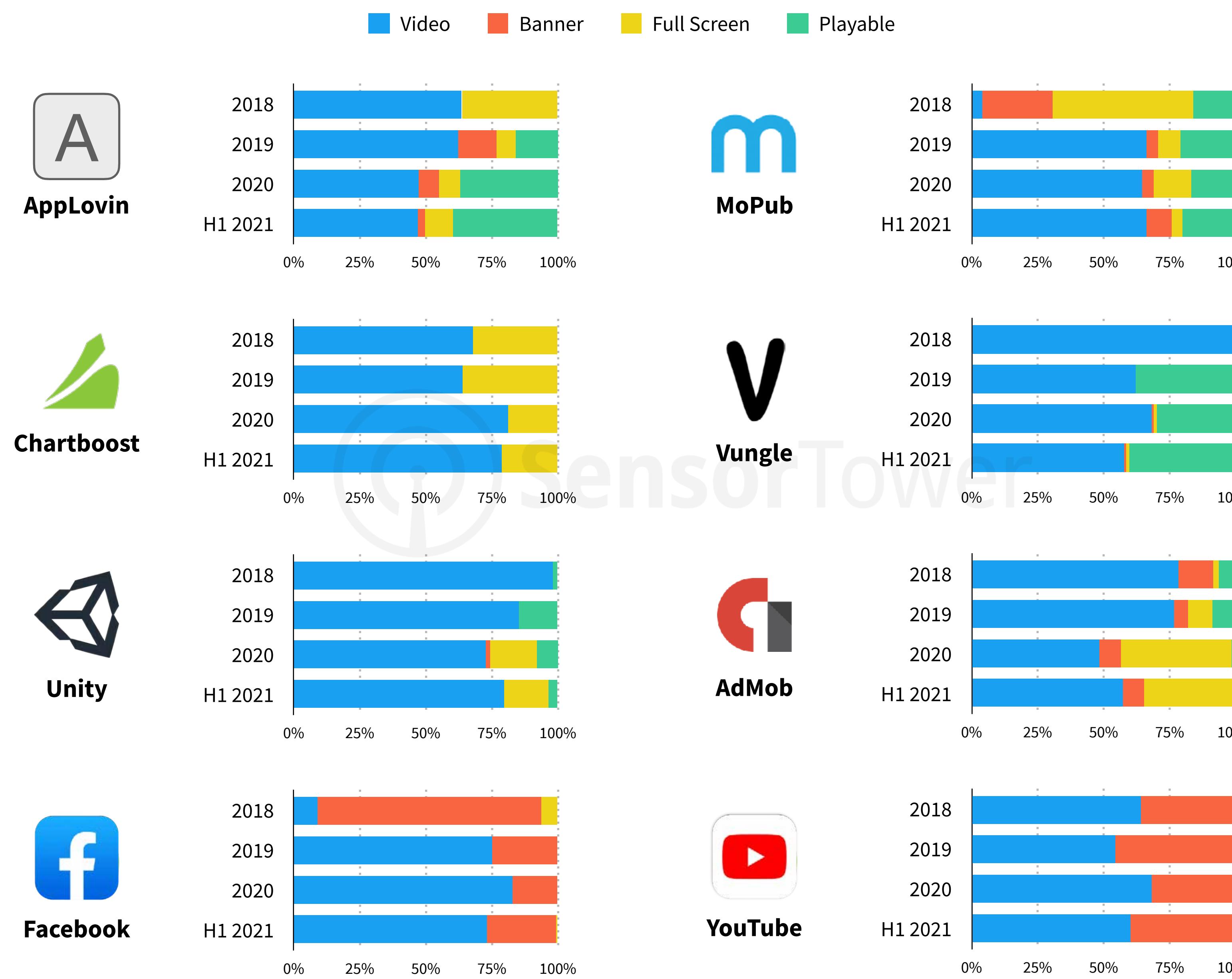


Similar to what's seen on iOS, AppLovin's share of voice from Google Play games has hovered around 90 percent since Q1 2019. Among the ad networks tracked by Sensor Tower, only Chartboost had a higher SOV from games since the start of 2018.

Interestingly, while games have continued to control share of voice for MoPub on iOS, game SOV decreased on Android in late 2020. Top advertisers on the network in Q2 2021 included Audible, TikTok, and Venmo, and only four games ranked among the top 20 apps by SOV. In contrast, AdMob has become more gaming focused on Android since the start of 2020.

Games Still Rely on Video Creatives Across Top Networks

U.S. iOS share of voice among mobile game advertisers by ad type



Mobile game advertisers continue to rely on videos as their primary creative type. Video ads accounted for more than half of game advertising share of voice on each of these networks in 1H21 with the exception of AppLovin, which fell just below 50 percent.

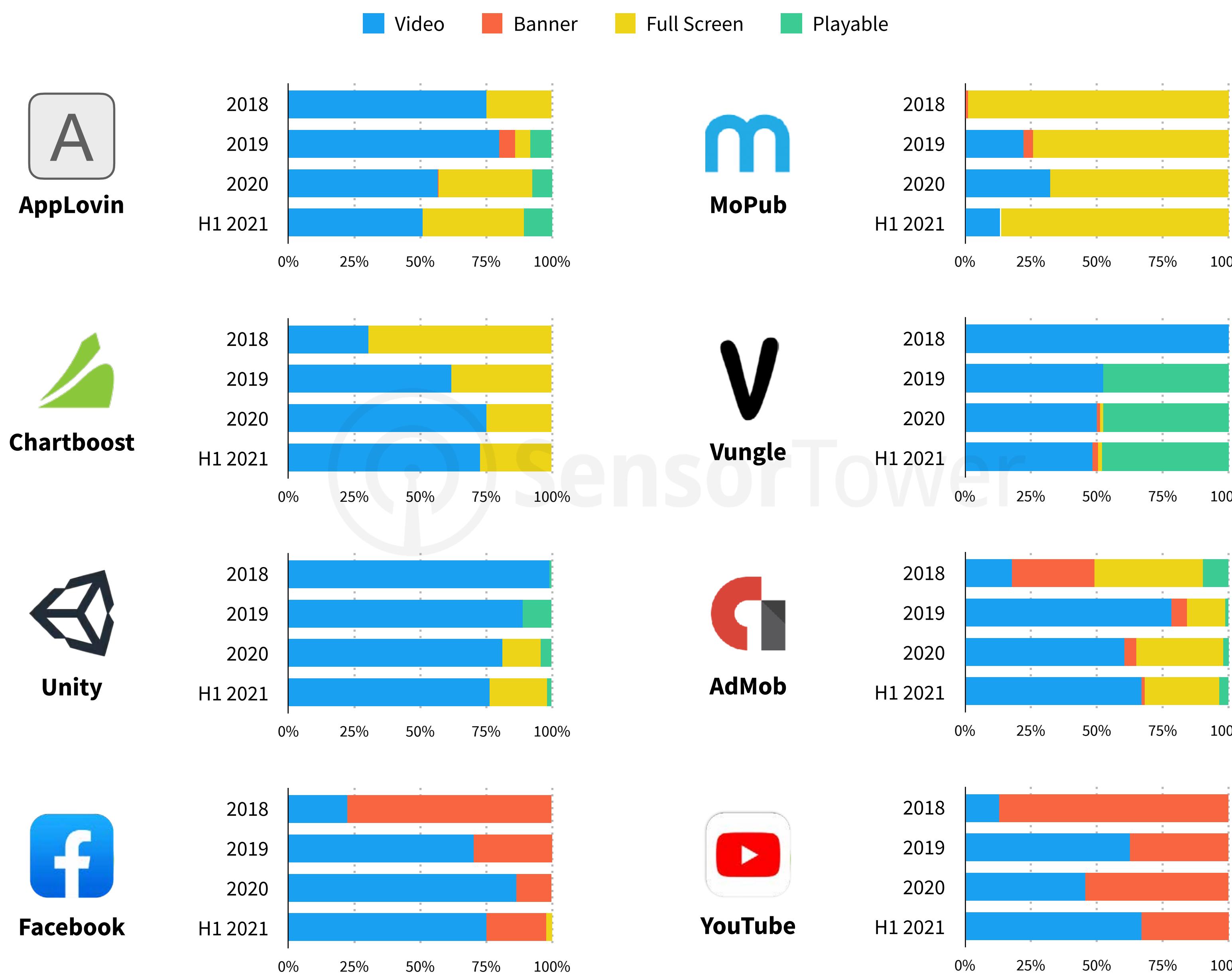
AppLovin has turned more towards playable ads in recent years. The network is popular among Hypercasual and Puzzle games, so playable ads are a good fit to highlight their simple gameplay. Vungle was another top ad network using playable ads.

Note:

Sensor Tower began measuring playable ads on AppLovin, Unity, and Vungle at the beginning of 2019.

Full Screen Ads Were More Common for Google Play Games

U.S. Android share of voice among mobile game advertisers by ad type



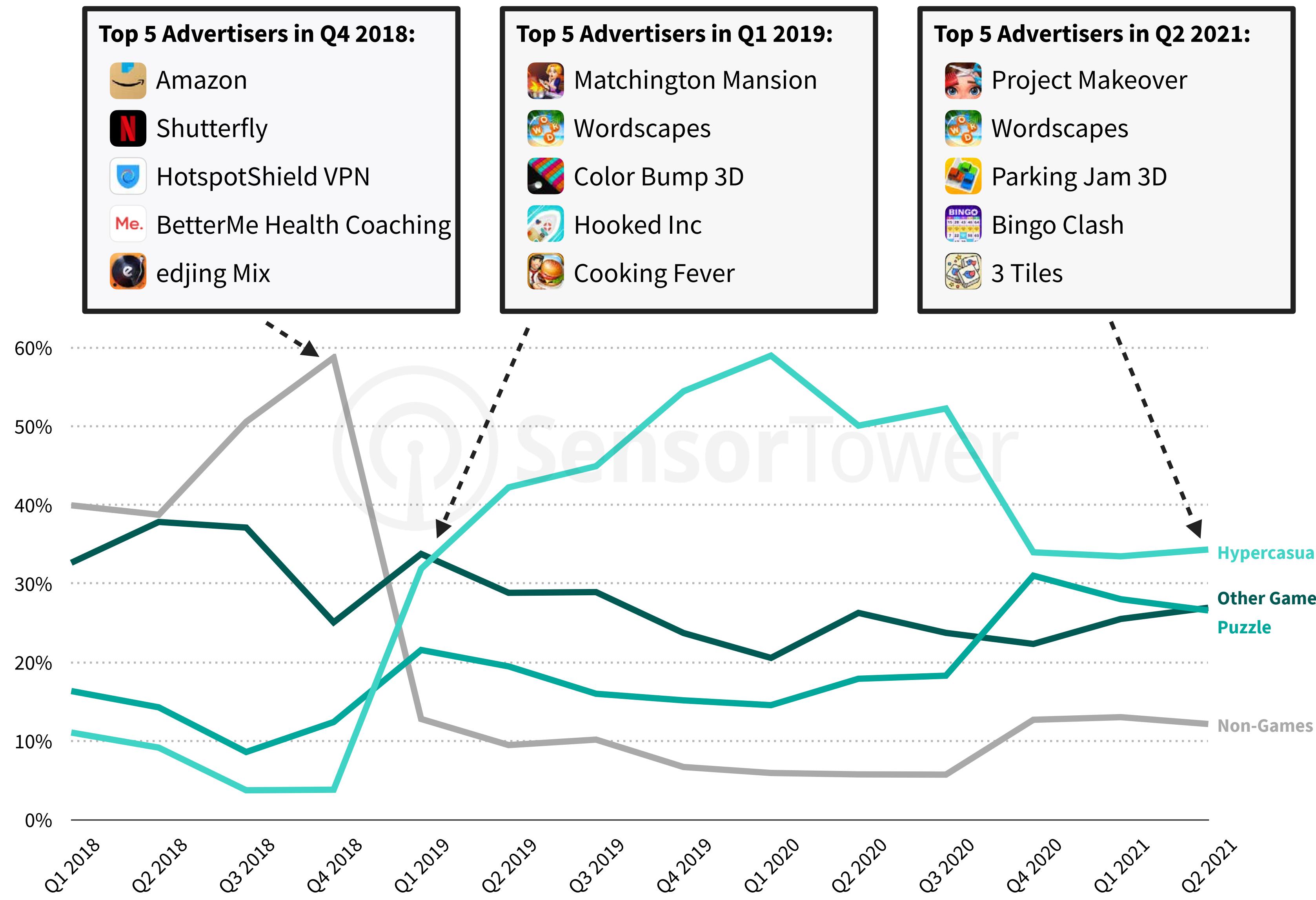
Game advertisers also primarily use video ads on most ad networks on Android, including Chartboost, Unity, AdMob, and Facebook. Vungle had the highest share of voice from playables at nearly 50 percent in H1 2021.

MoPub had lower SOV from video creatives on Android relative to iOS, with full screen ads as the top ad type for Google Play titles. Since mobile games tend to use video ads, this is likely related to why games using the ad network have a lower SOV on Android than on the iOS.

Note:
Sensor Tower began measuring playable ads on AppLovin, Unity, and Vungle at the beginning of 2019.

AppLovin Shifted Ad Network Focus to Casual Games

Quarterly U.S. iOS share of voice on AppLovin

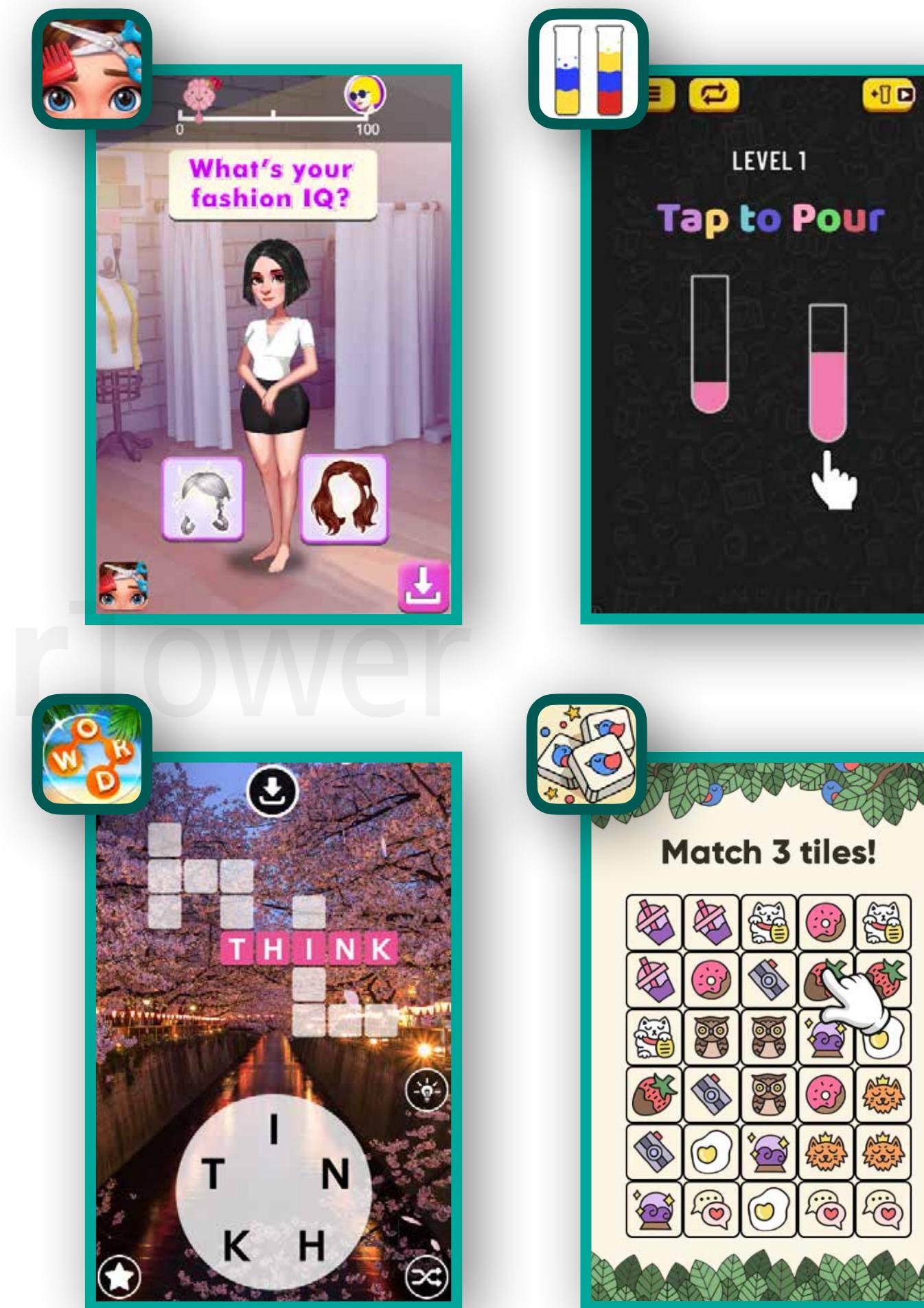
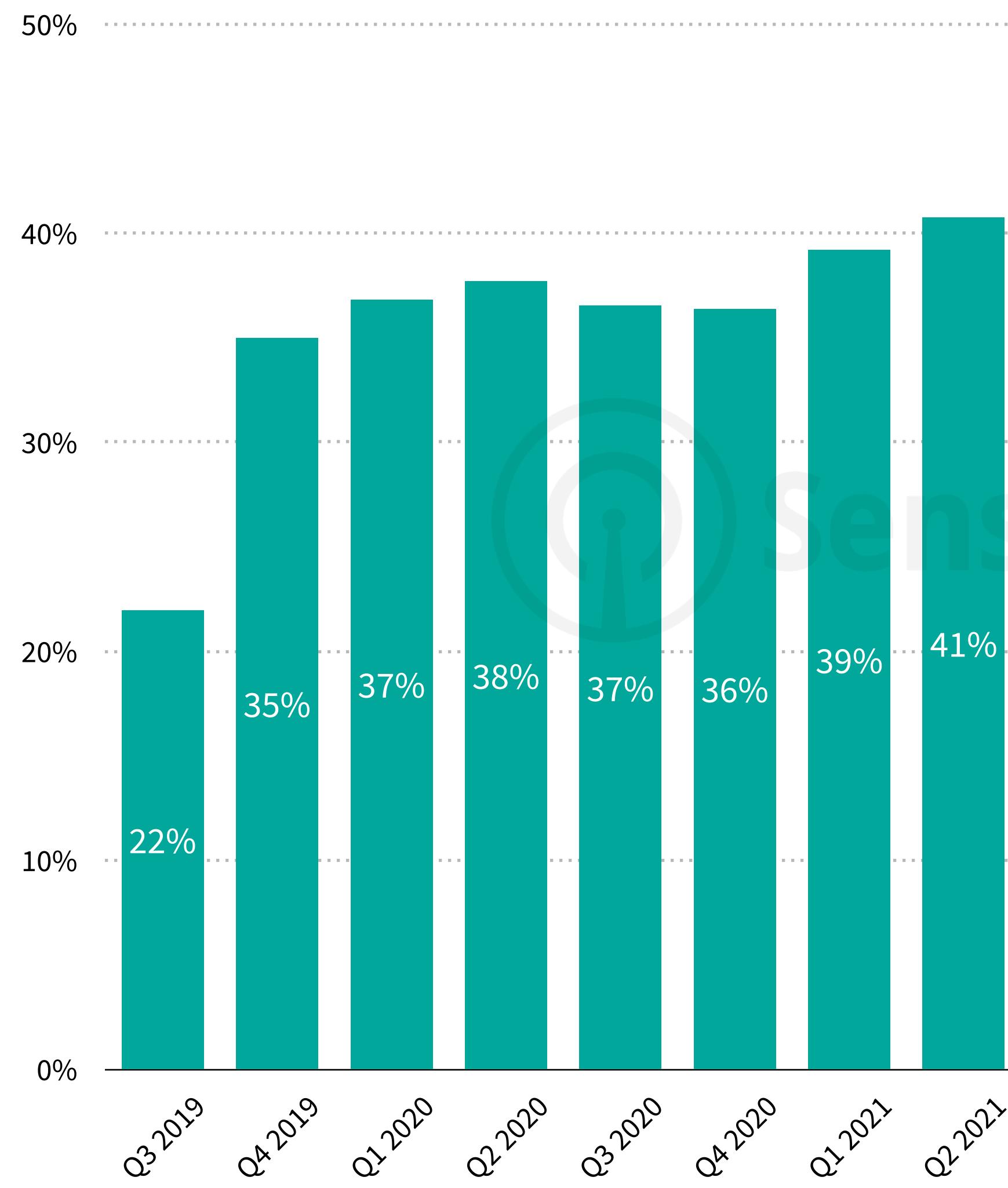


AppLovin's shift towards gaming at the start of 2019 was focused on the Hypercasual and Puzzle game genres, with other game genres seeing SOV decline slightly. This was quite the sudden shift, with non-game SOV decreasing by 46 percentage points Q/Q in Q1 2019.

The increased SOV for Hypercasual and Puzzle games was also in line with AppLovin's investments in casual games publishers in the past few years. Several games from AppLovin's partner studios were among the top advertisers on the network, including Project Makeover from Magic Tavern, Wordscapes from PeopleFun, and Matchington Mansion from Firecraft Studios.

AppLovin Has Embraced Playable Ads for Casual Games

AppLovin's U.S. iOS share of voice from playable ads among mobile game advertisers

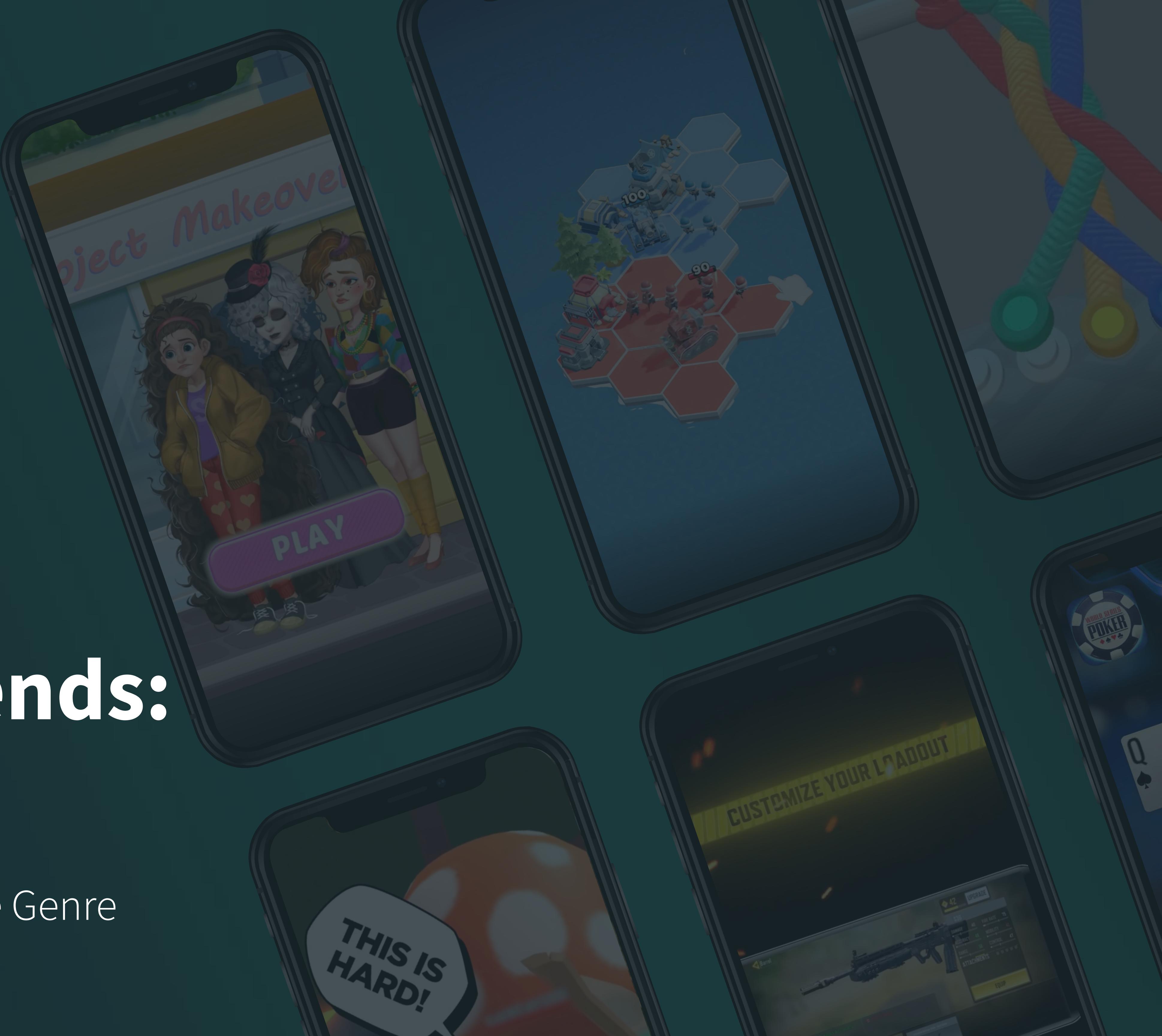


With AppLovin's focus on casual games, playable ads were a natural fit for the network. The simple gameplay and quick learning curves for Hypercasual and Puzzle games allowed playable ads to give an accurate preview of their games. By Q2 2021, more than 40 percent of AppLovin's SOV for App Store games was from playable ads, more than any other network.



Game Genre Trends: United States

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Game Advertising Trends by Game Genre

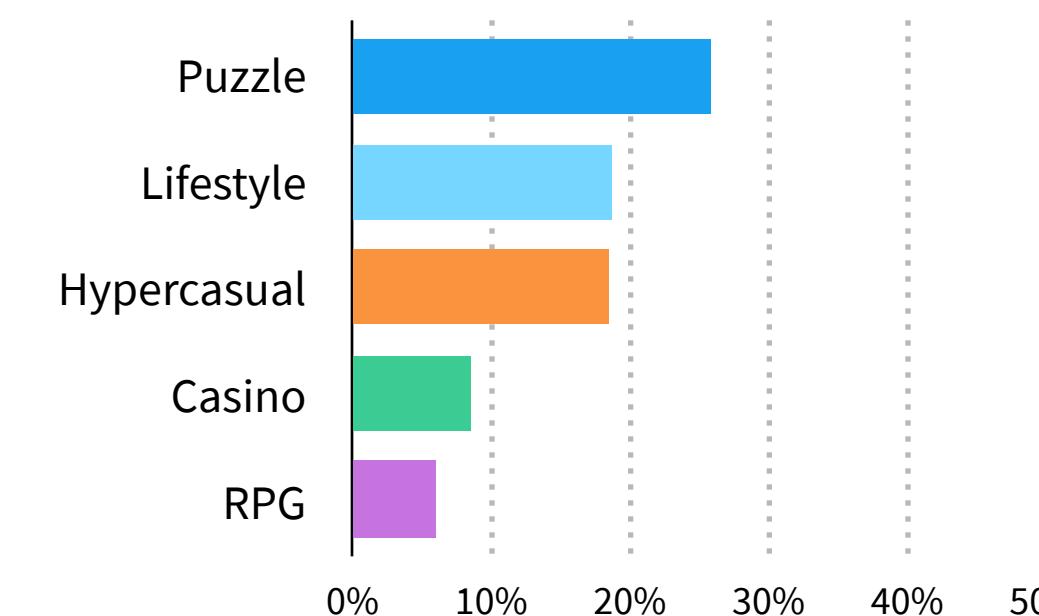


Gaming-Focused Networks Were Popular for Puzzle Games

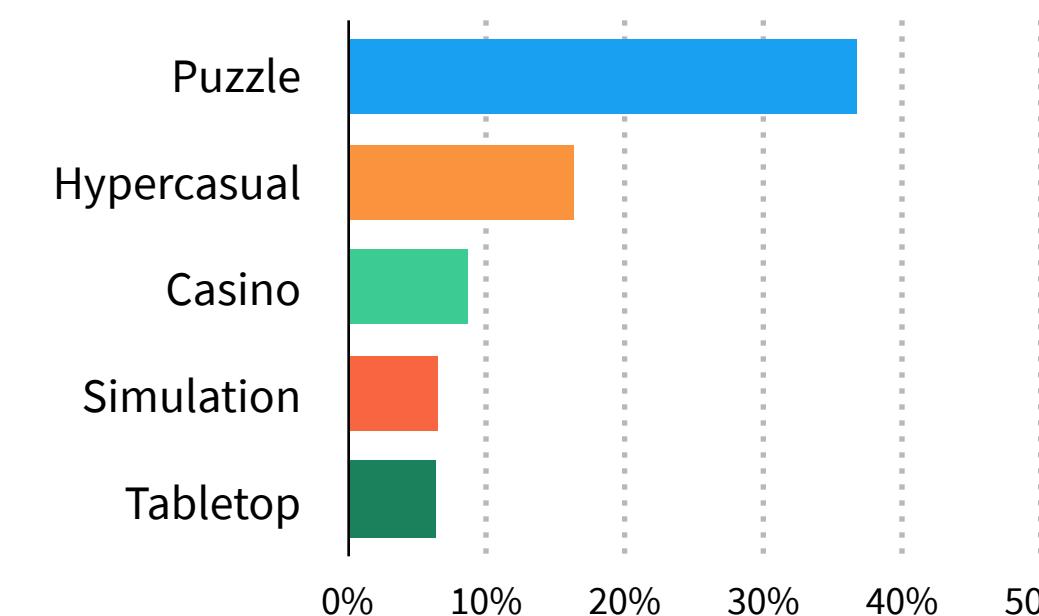
U.S. iOS share of voice among game advertisers by game genre, 1Q18 to 1Q21



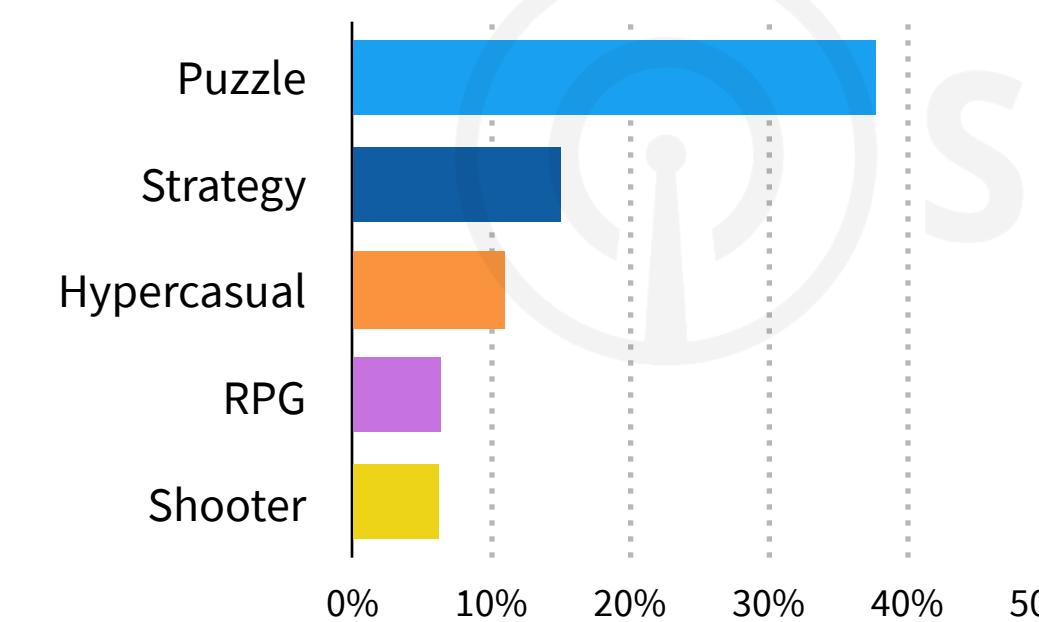
Chartboost



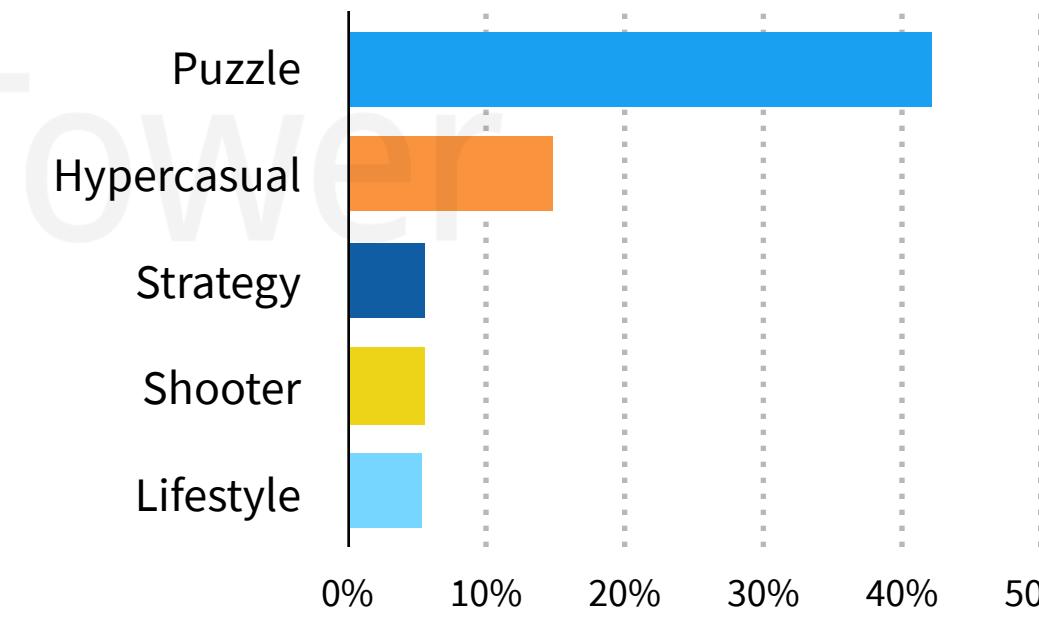
Adcolony



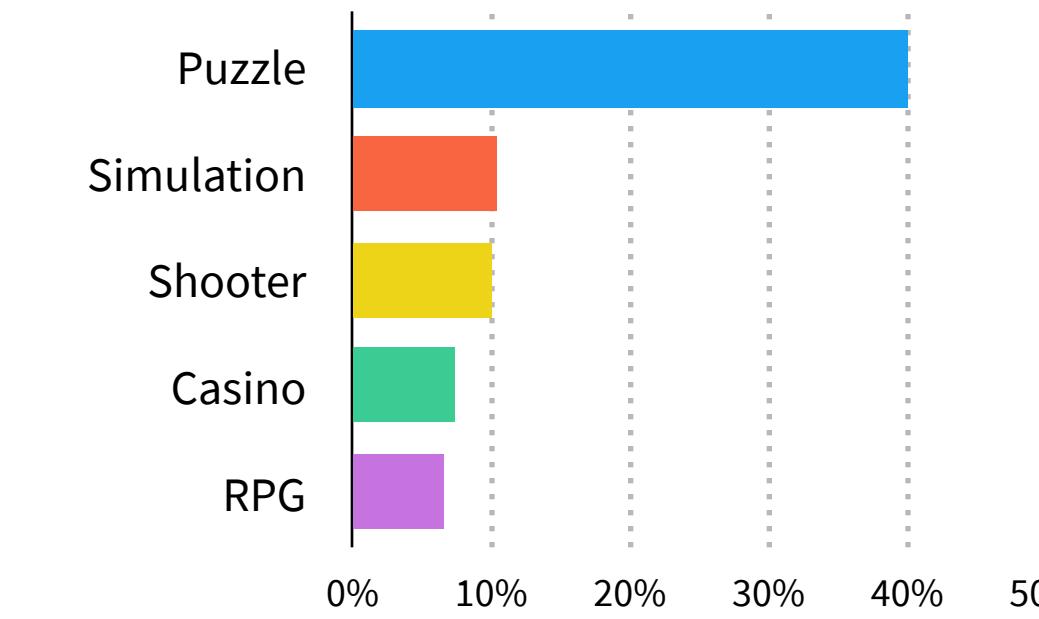
Unity



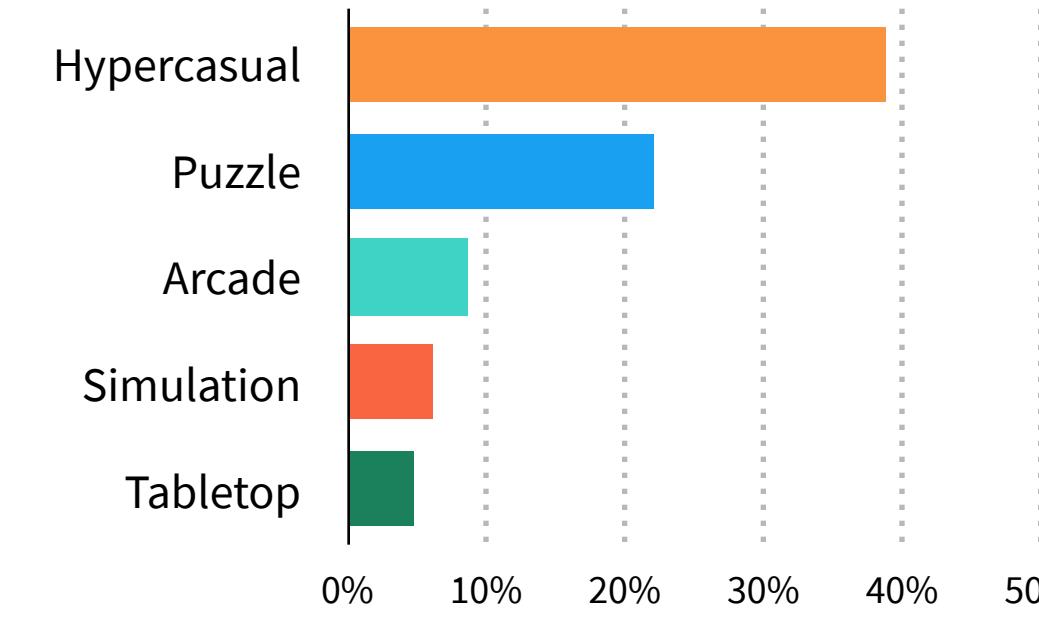
Vungle



ironSource



AppLovin



Puzzle games clearly relied heavily on advertising for user acquisition. Among the top six ad networks by game share of voice, Puzzle had the highest SOV on five networks.

AppLovin was the only exception, though Puzzle still ranked second on that network.

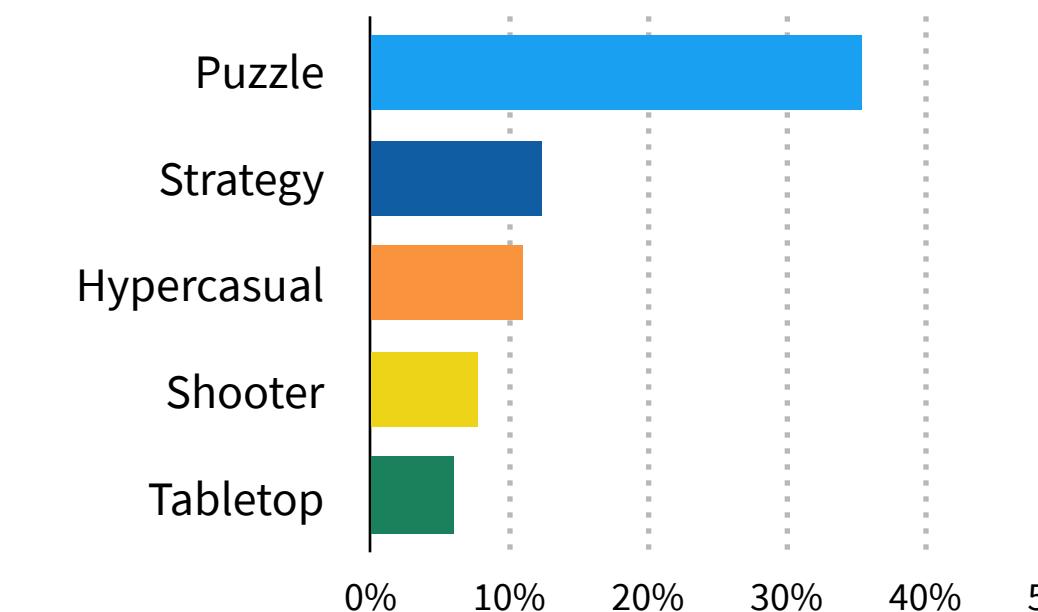
Casual game genres were prevalent for these gaming-focused networks. Hypercasual games also tended to advertise frequently on these networks, ranking as the first genre on AppLovin and among the top three on Adcolony, Unity, and Vungle. Some mid-core genres still ranked among the top five, such as RPG on Unity and Shooter on ironSource.

Facebook and YouTube Had Higher SOV From Mid-Core Games

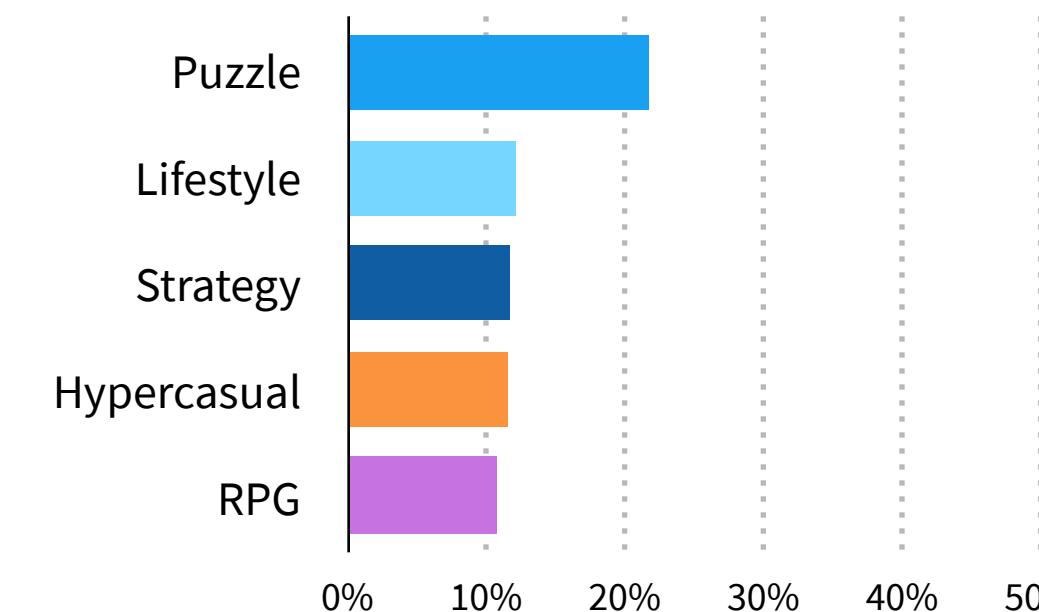
U.S. iOS share of voice among game advertisers by game genre, Q1 2018 - Q2 2021



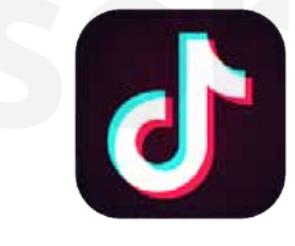
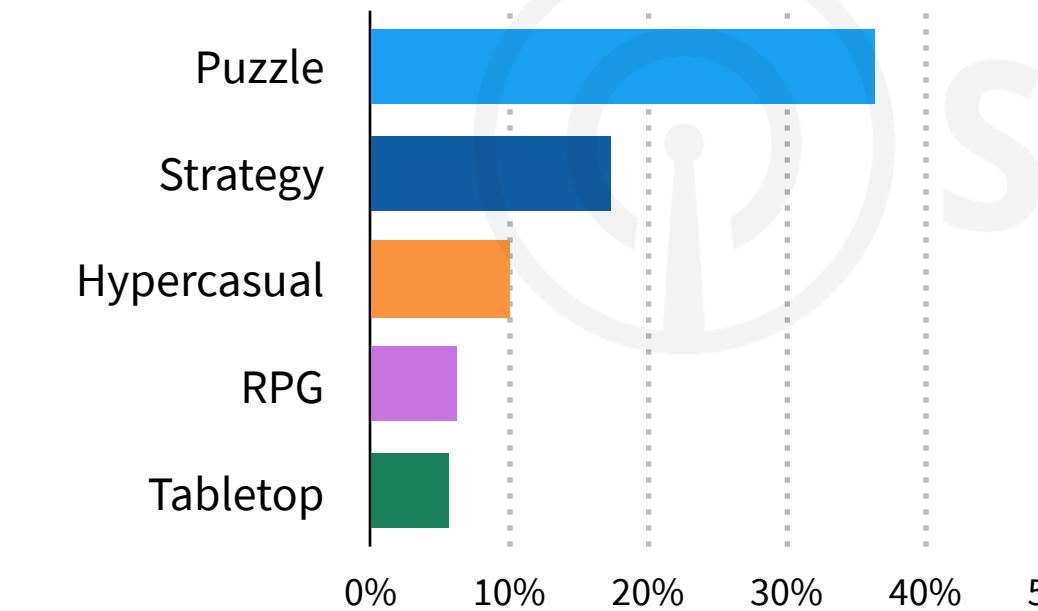
MoPub



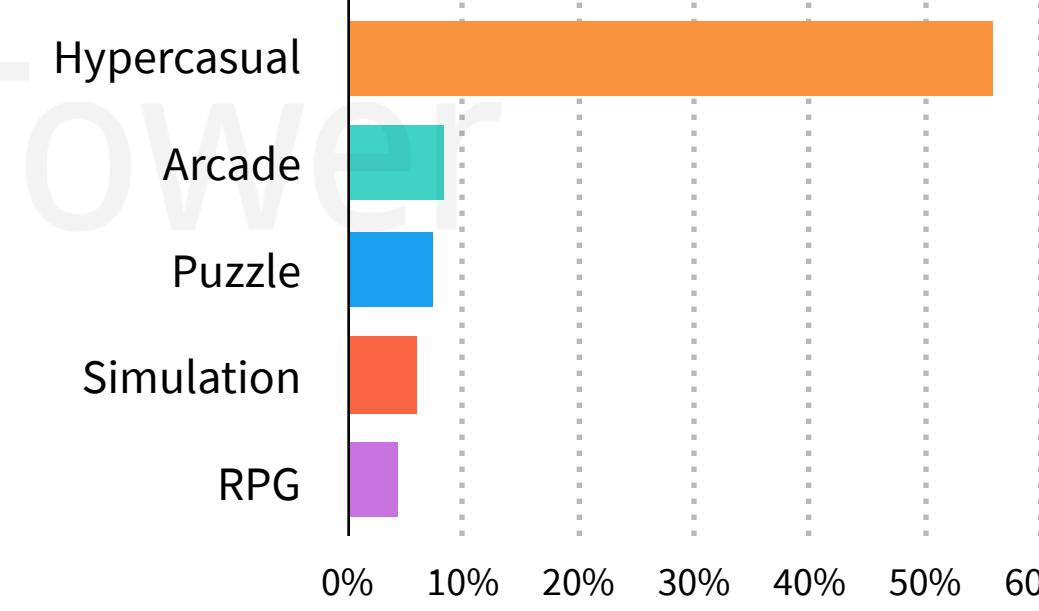
Facebook



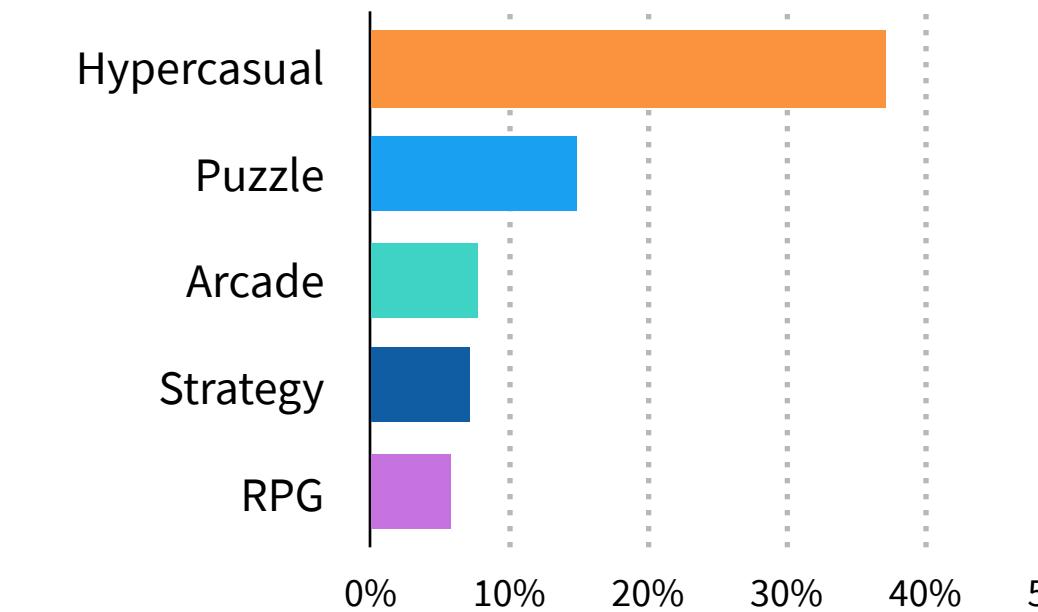
AdMob



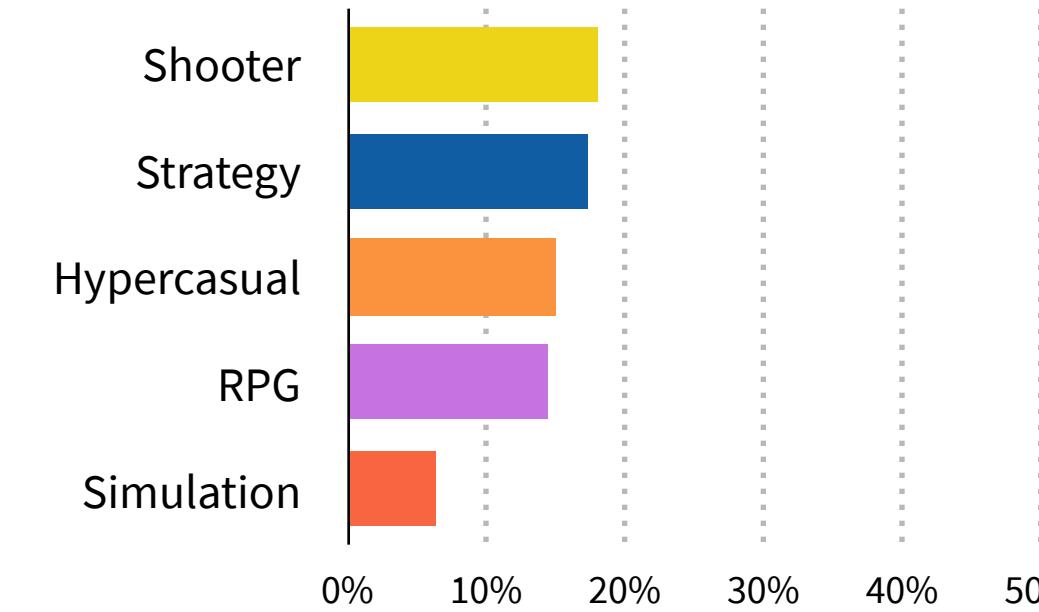
TikTok*



Instagram



YouTube



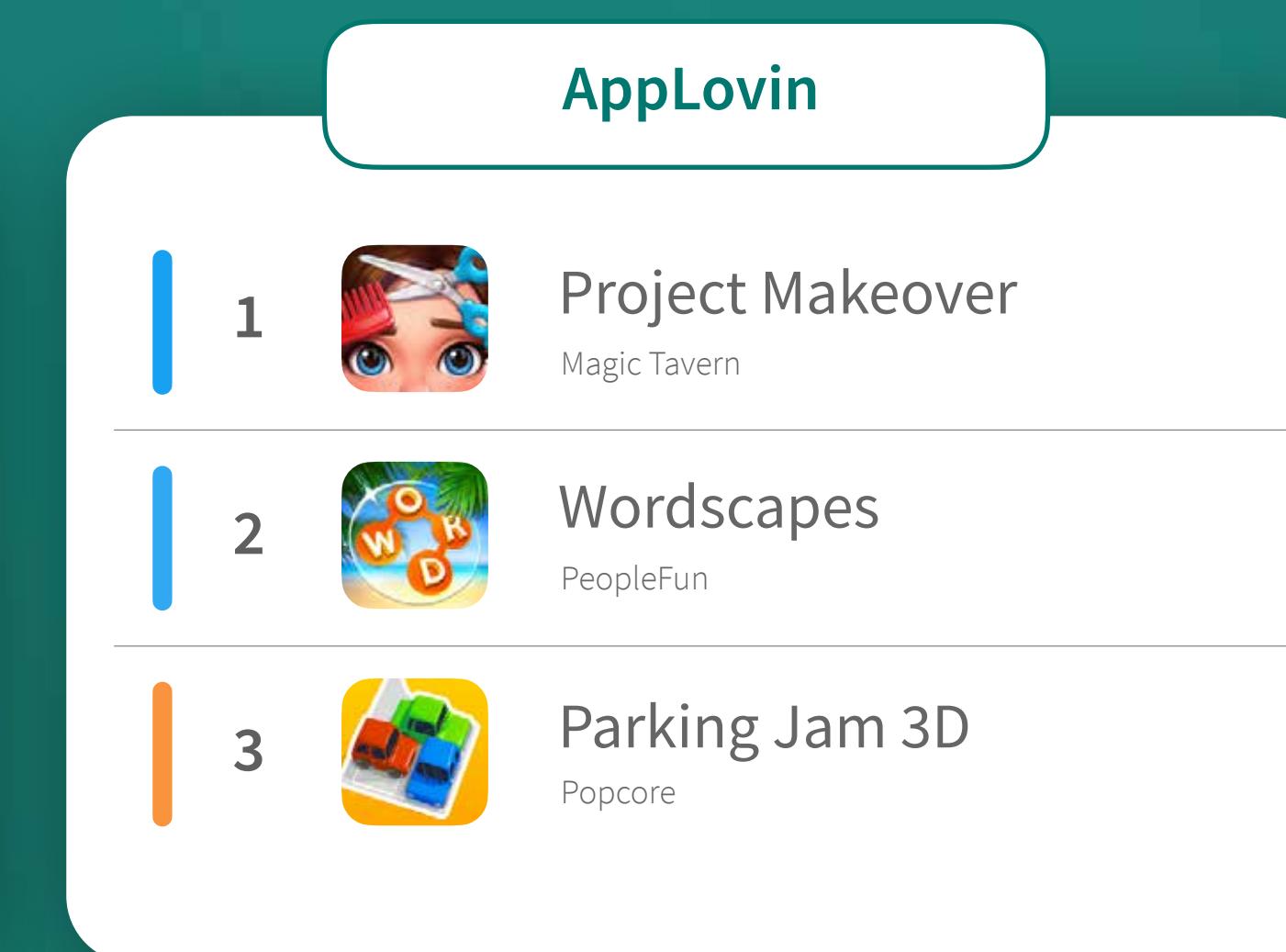
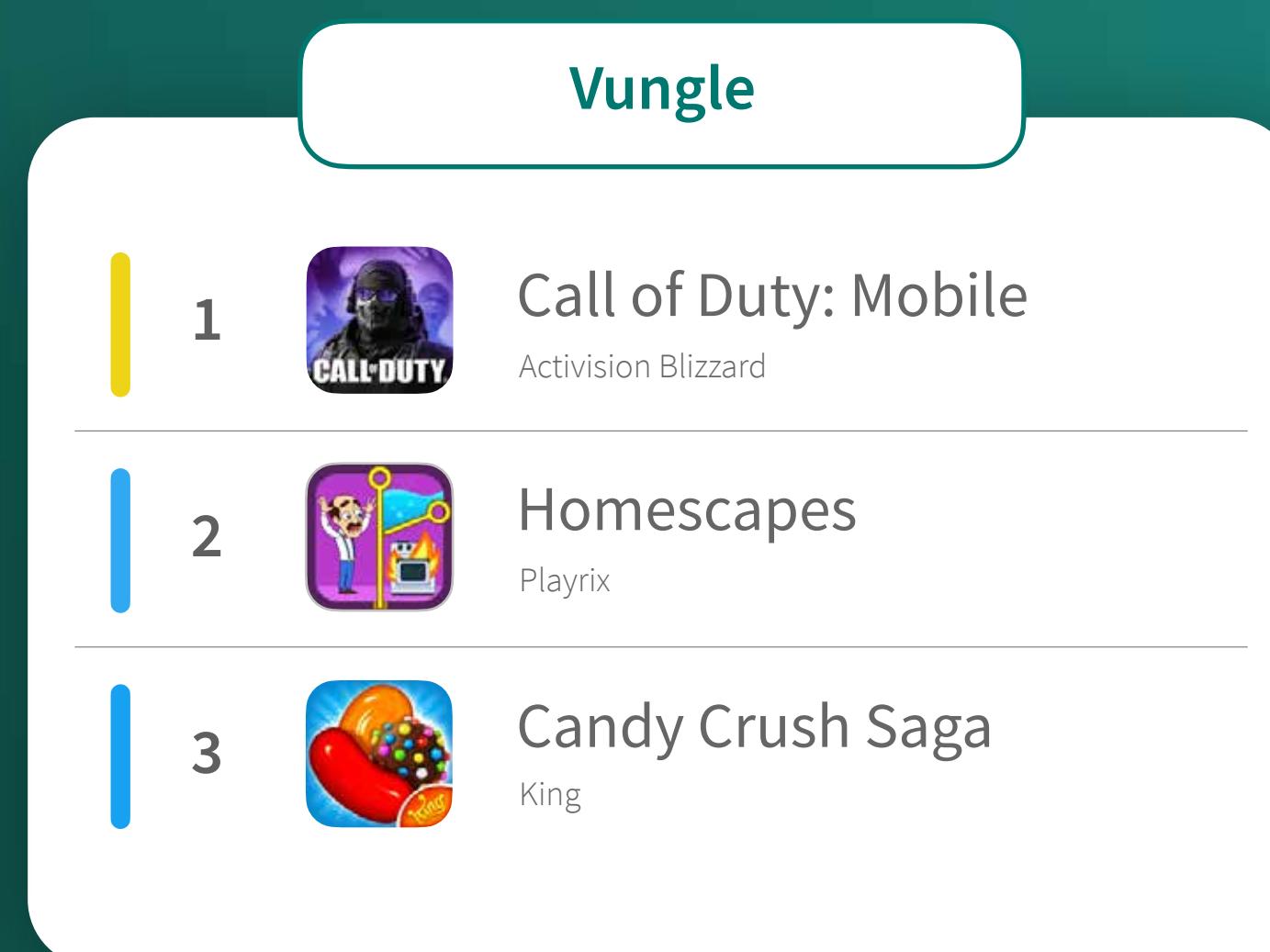
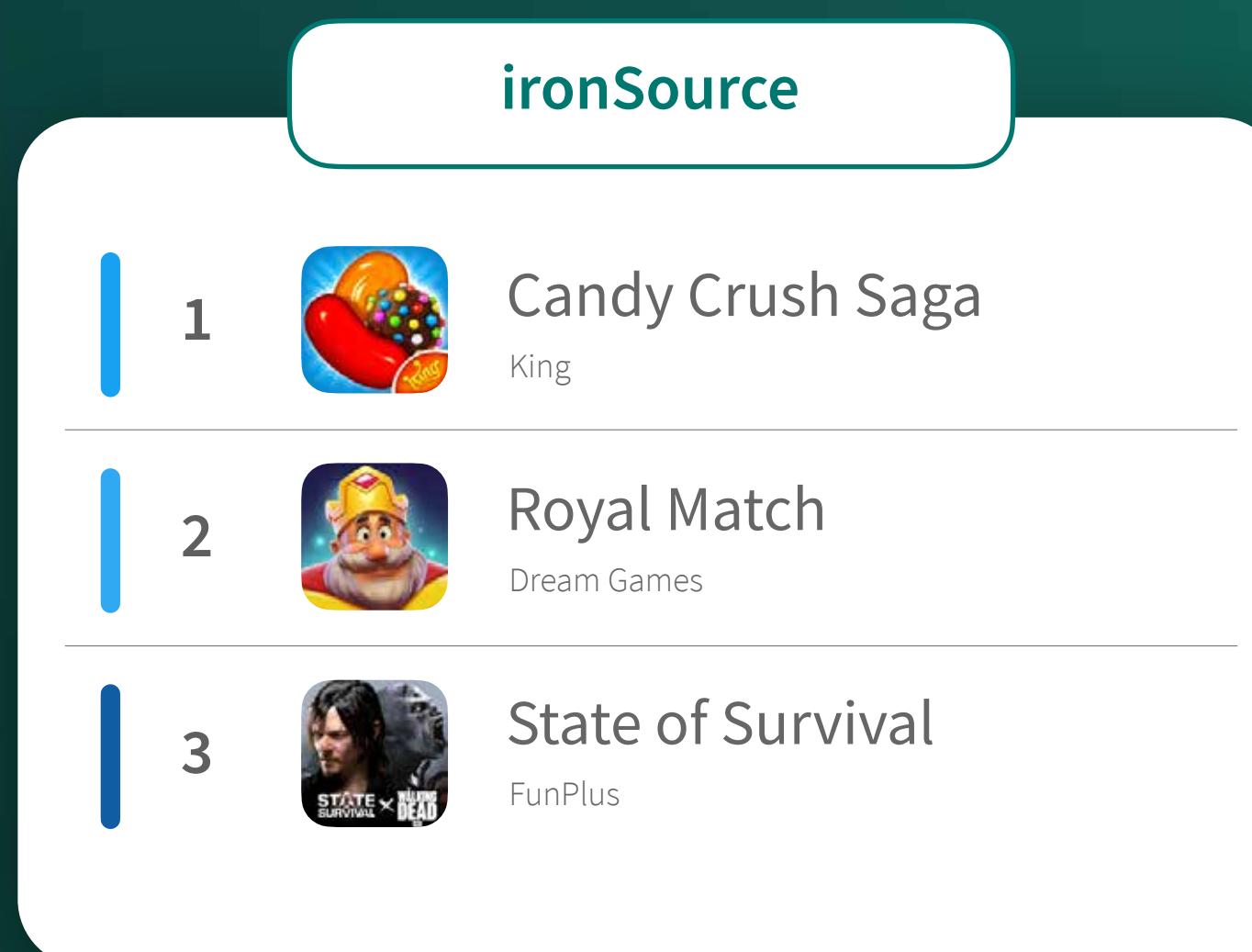
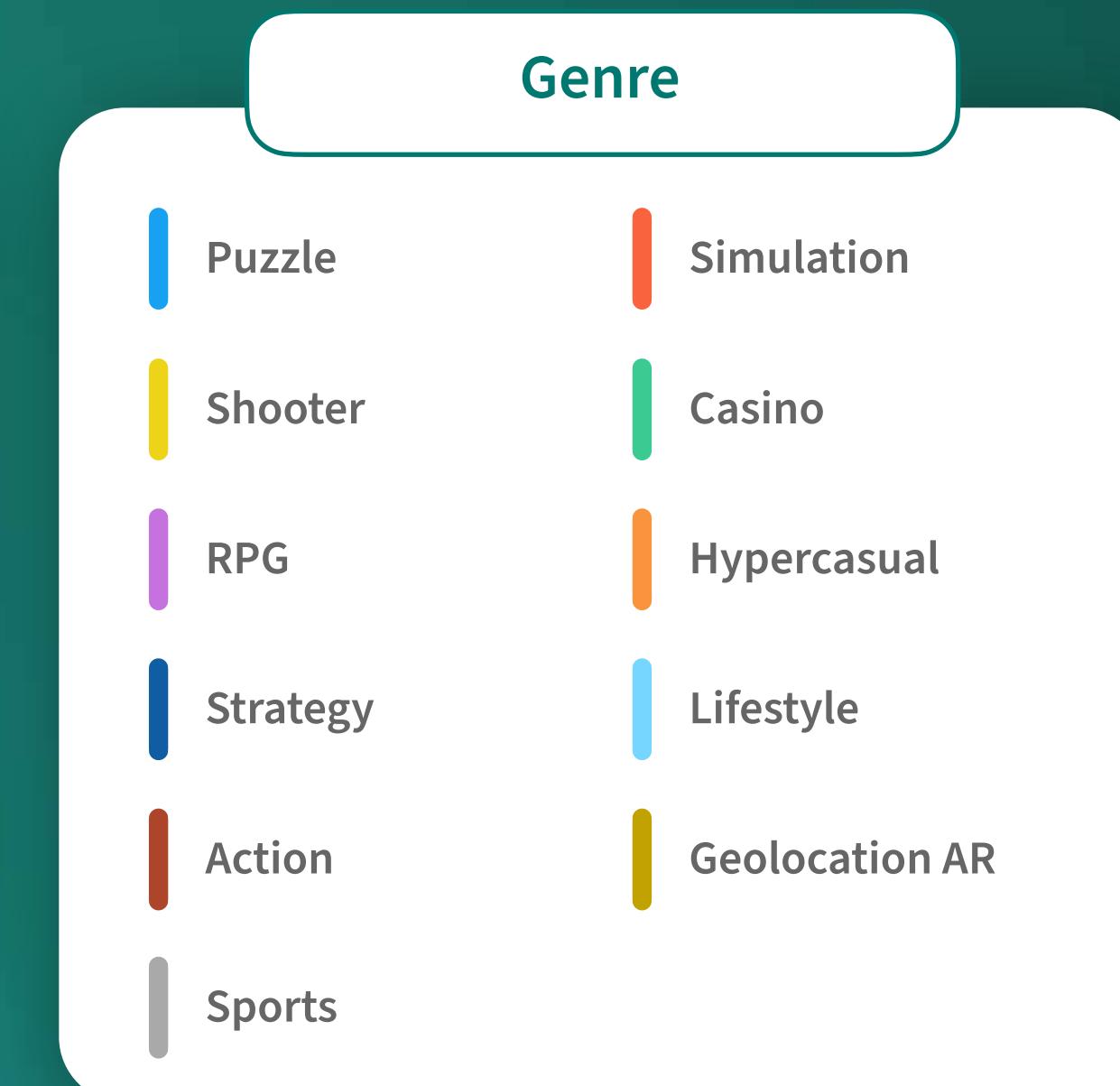
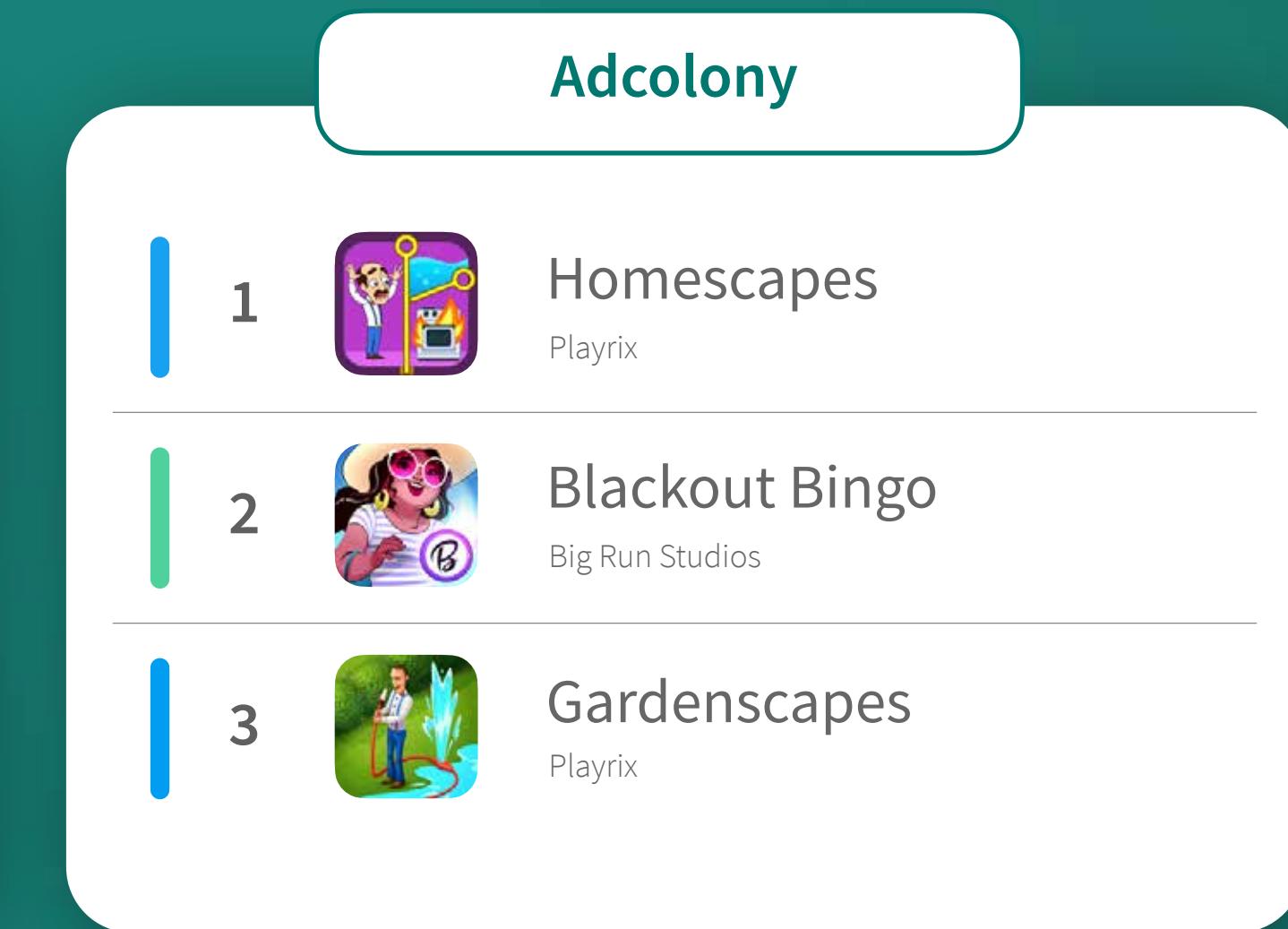
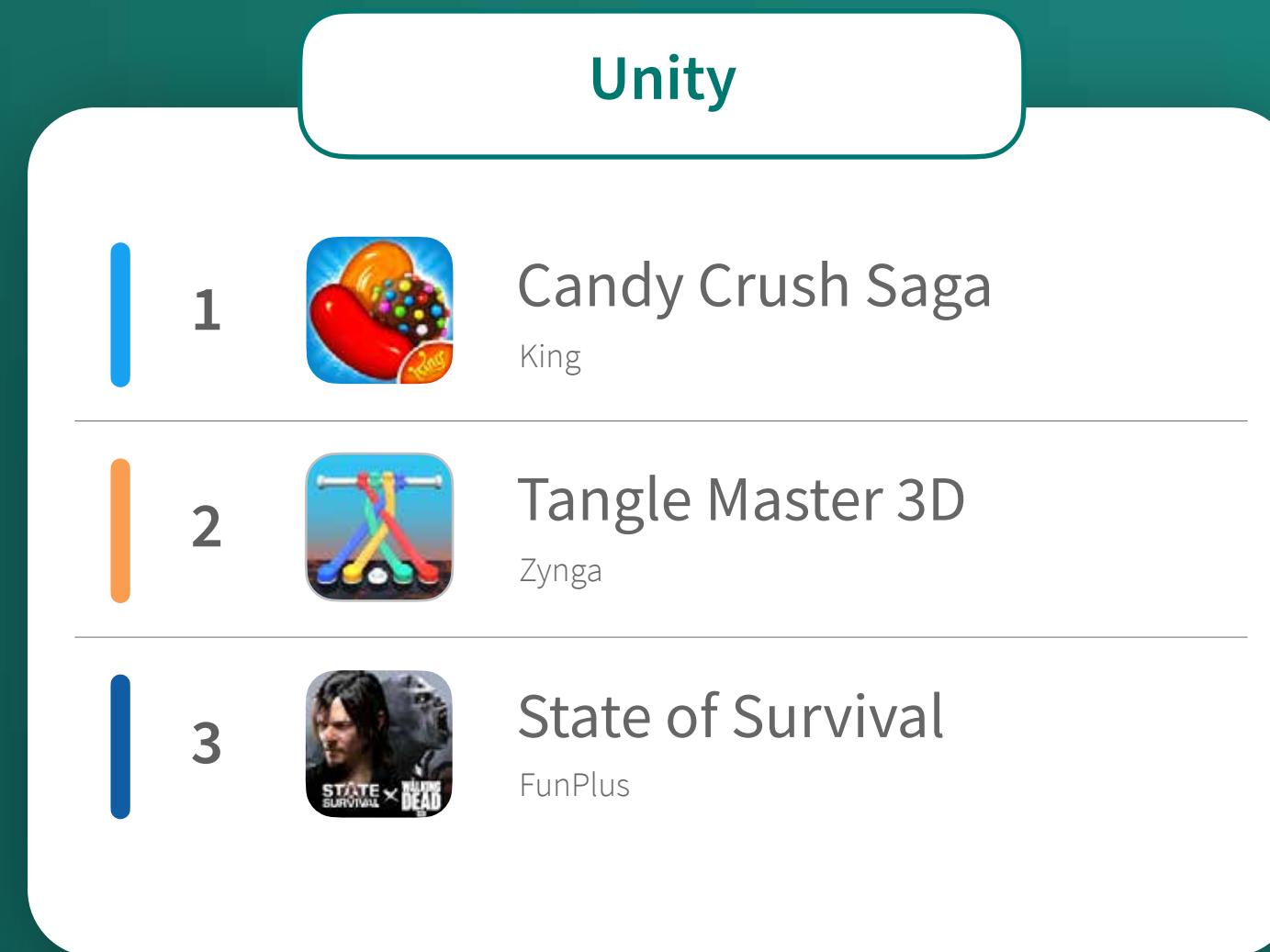
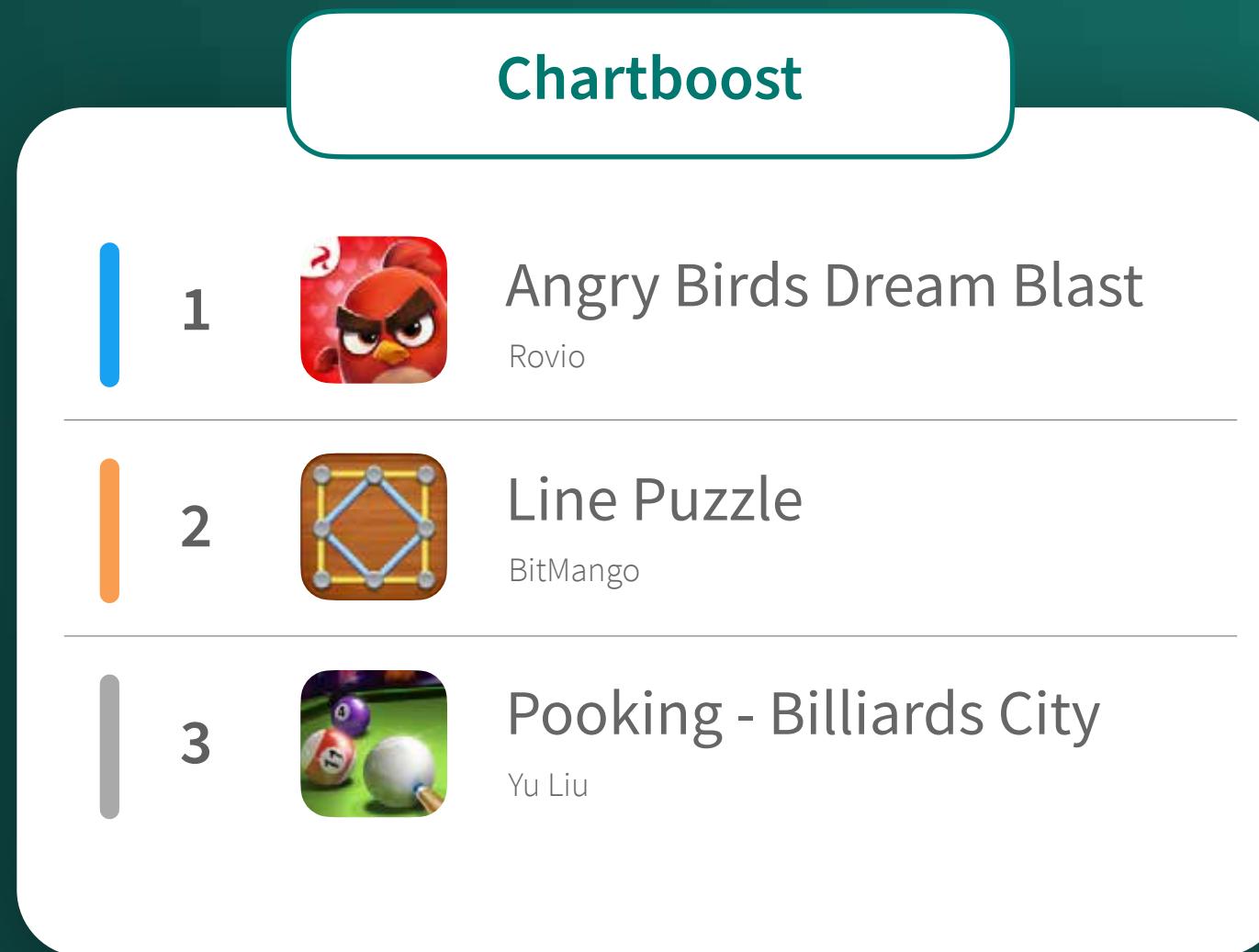
Networks from social media platforms and other ad networks with a more even split between gaming and non-gaming tended to have higher share of voice from mid-core genres. Strategy was among top three genres on four of these ad networks, and Shooter ranked first on YouTube.

Puzzle was still among the top genres across nearly all networks, including ranking first on MoPub, Facebook, and AdMob. Hypercasual was the top genre on Instagram and TikTok.

*TikTok share of voice includes data since Q4 2019

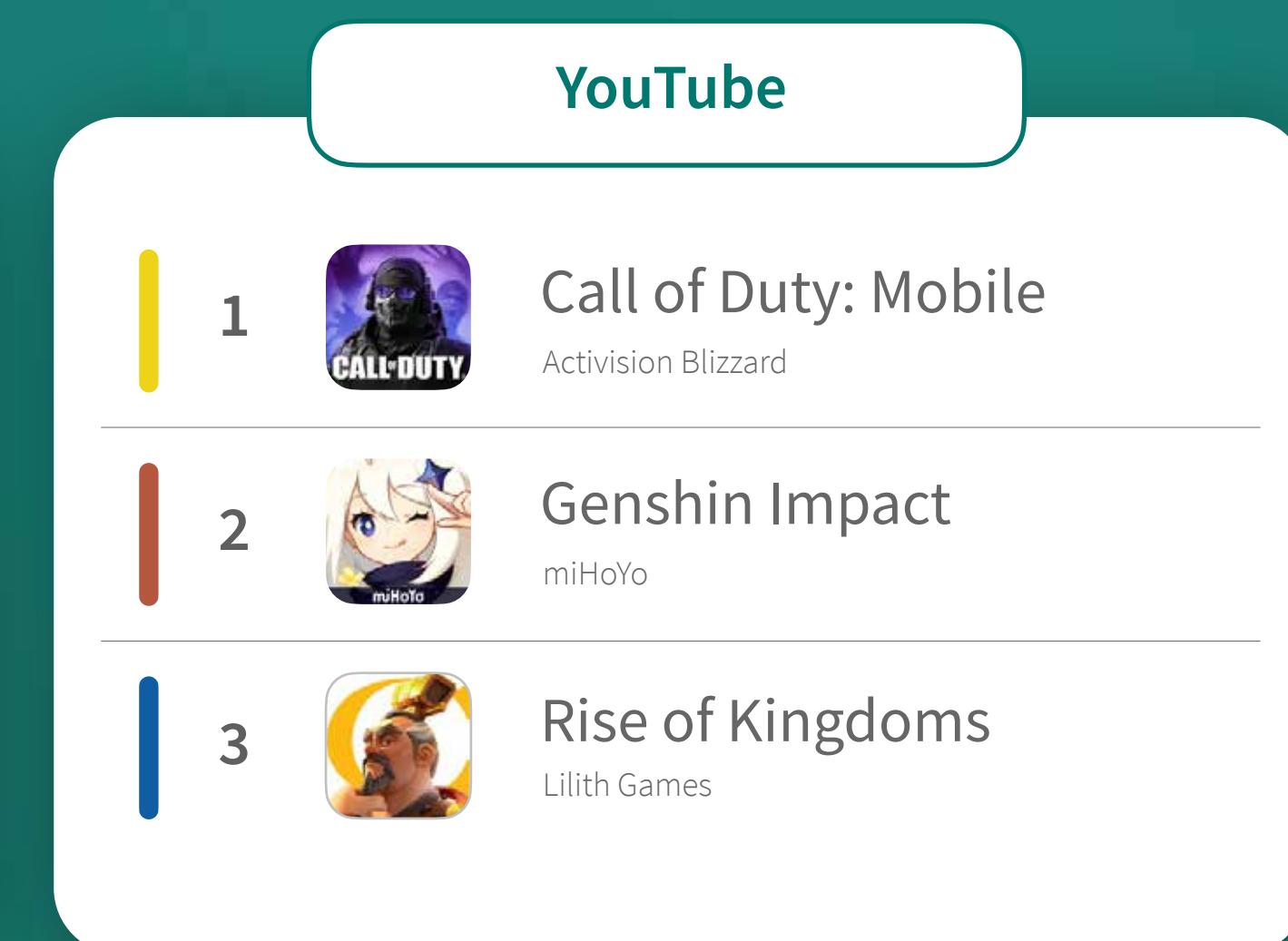
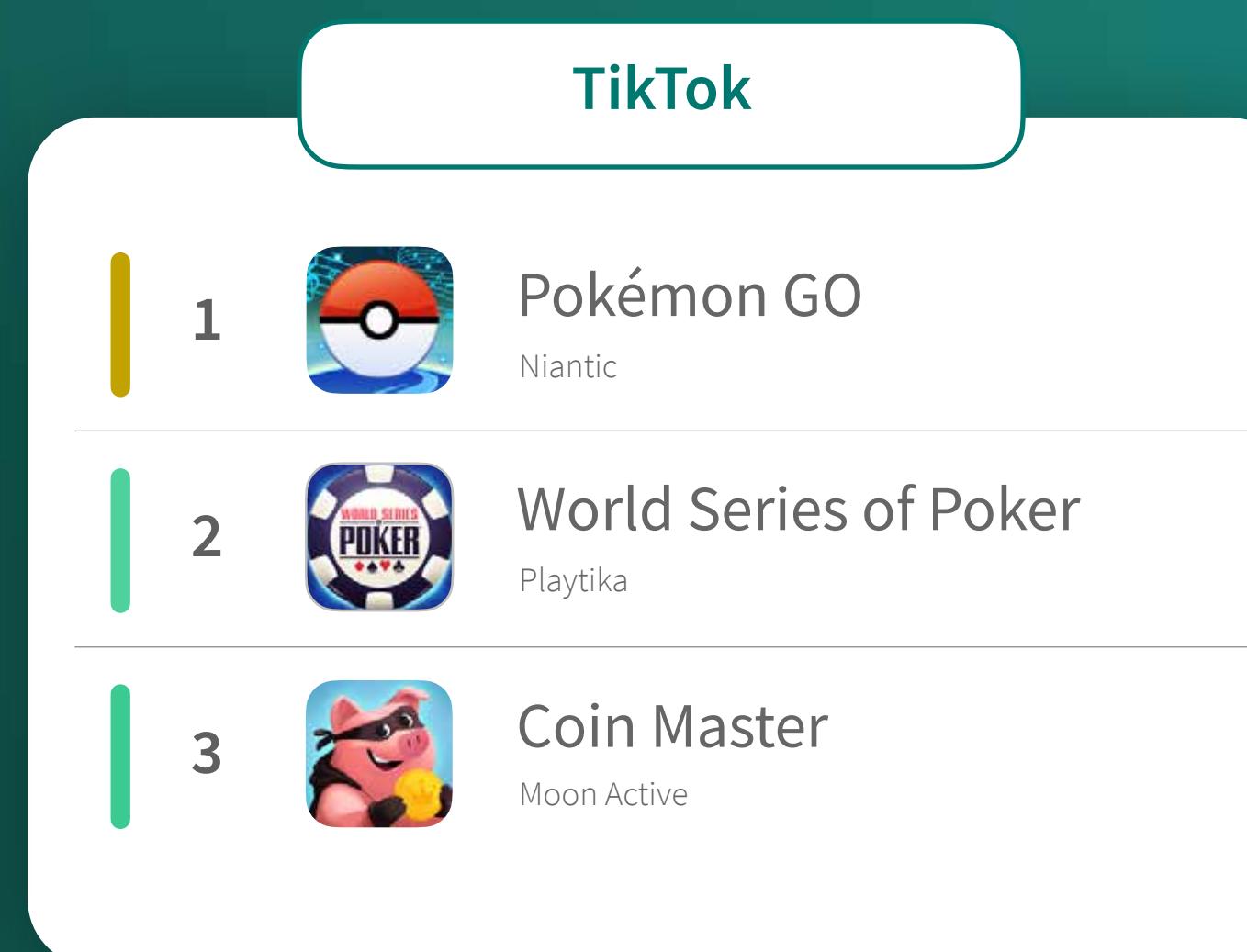
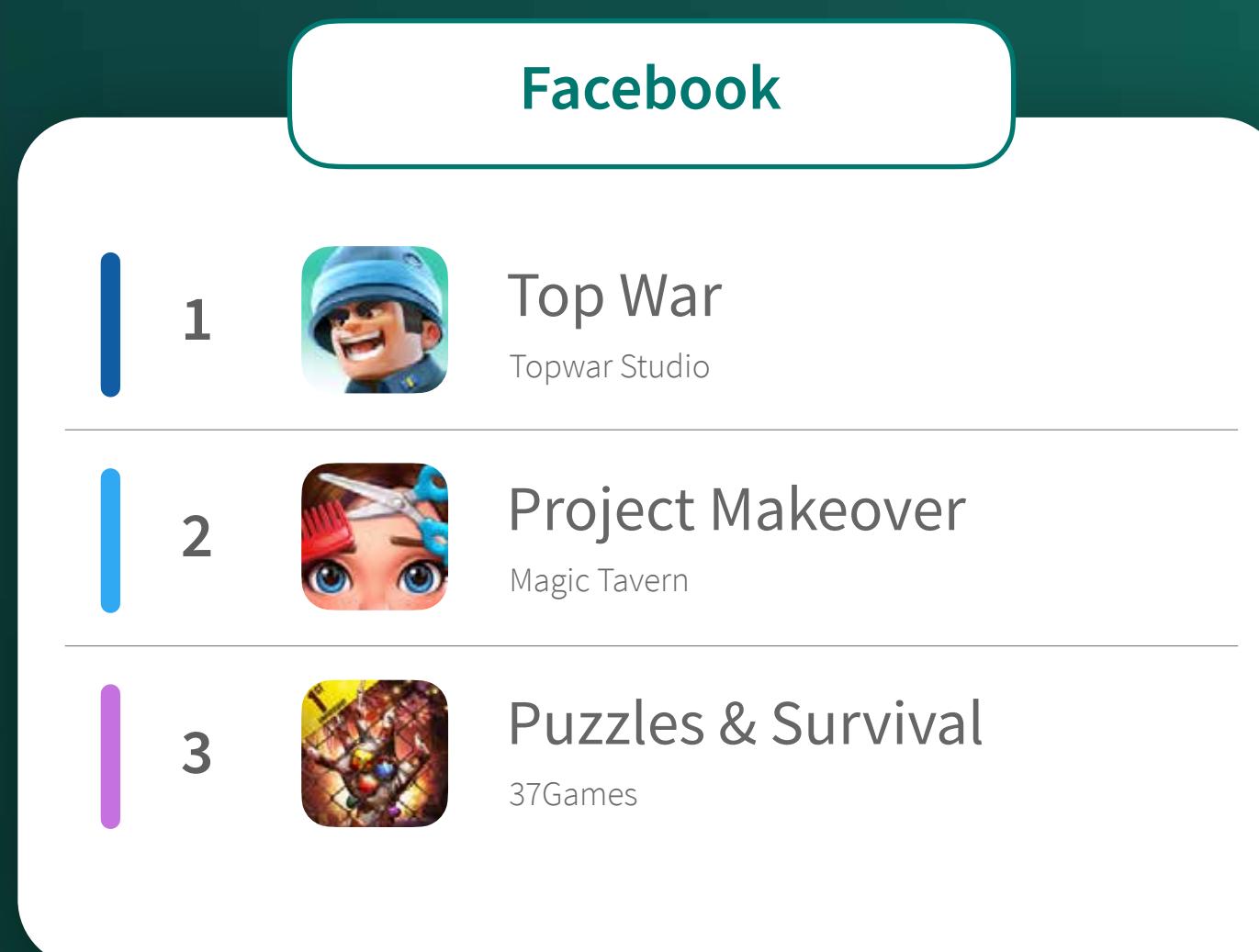
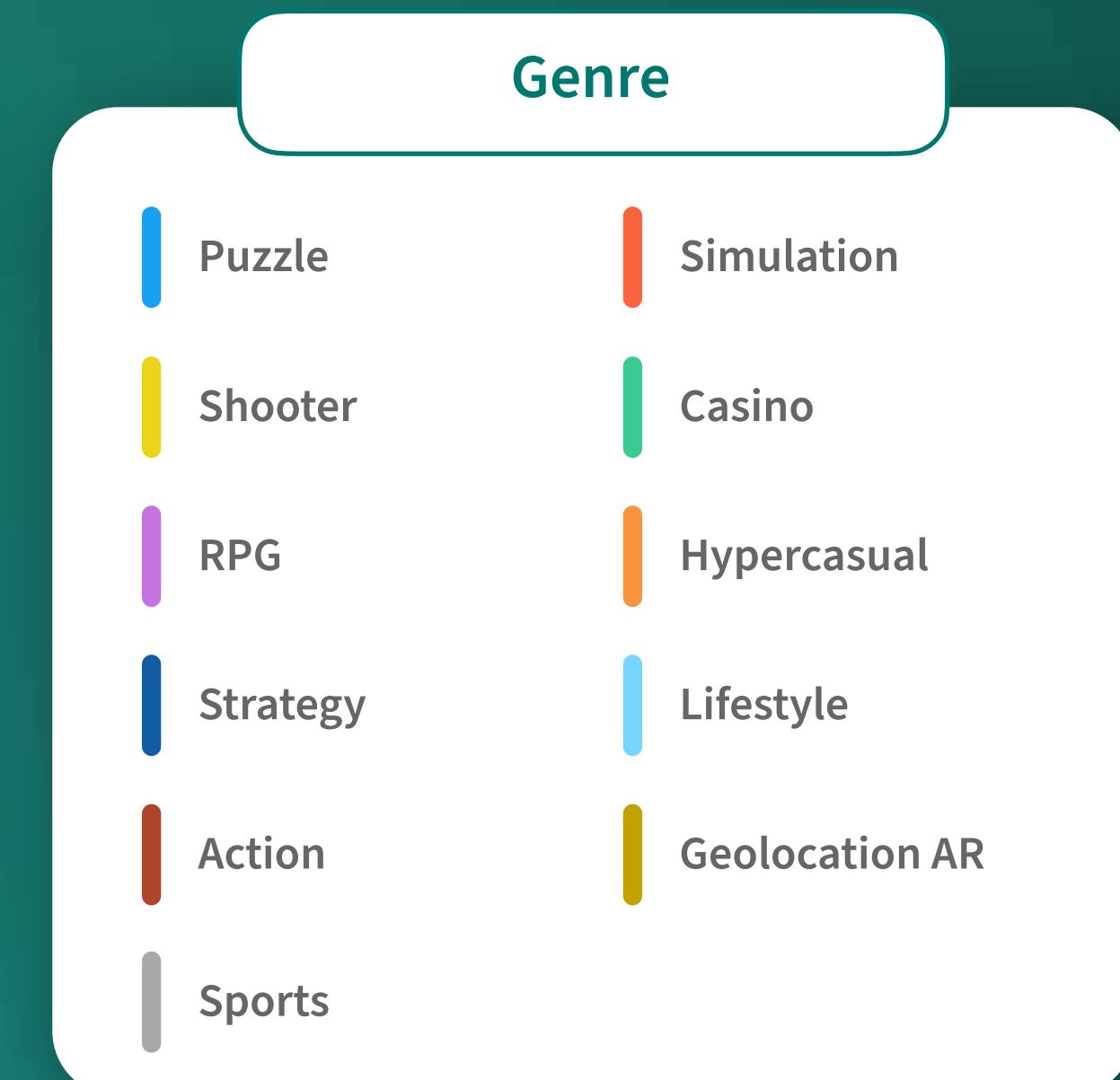
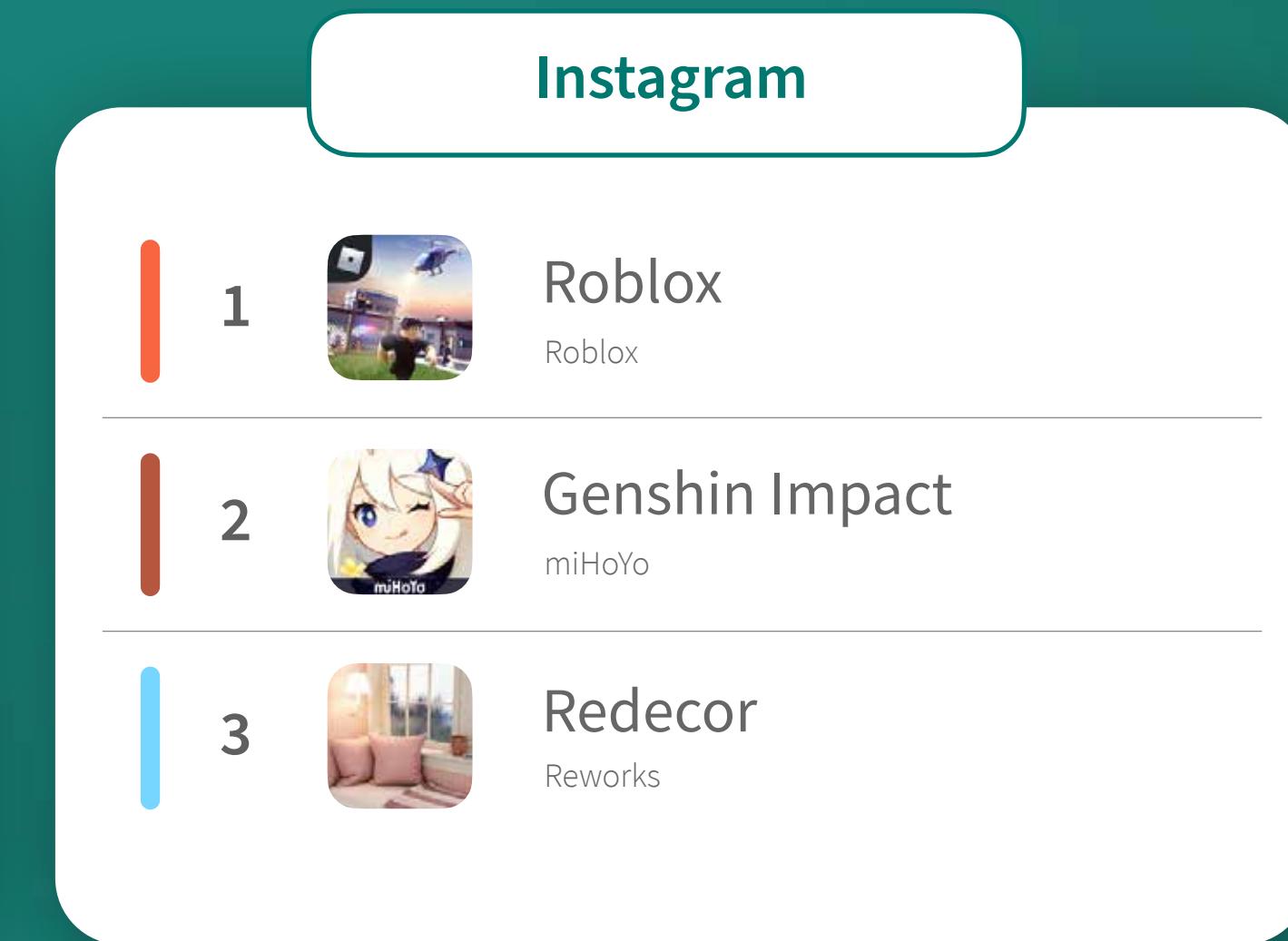
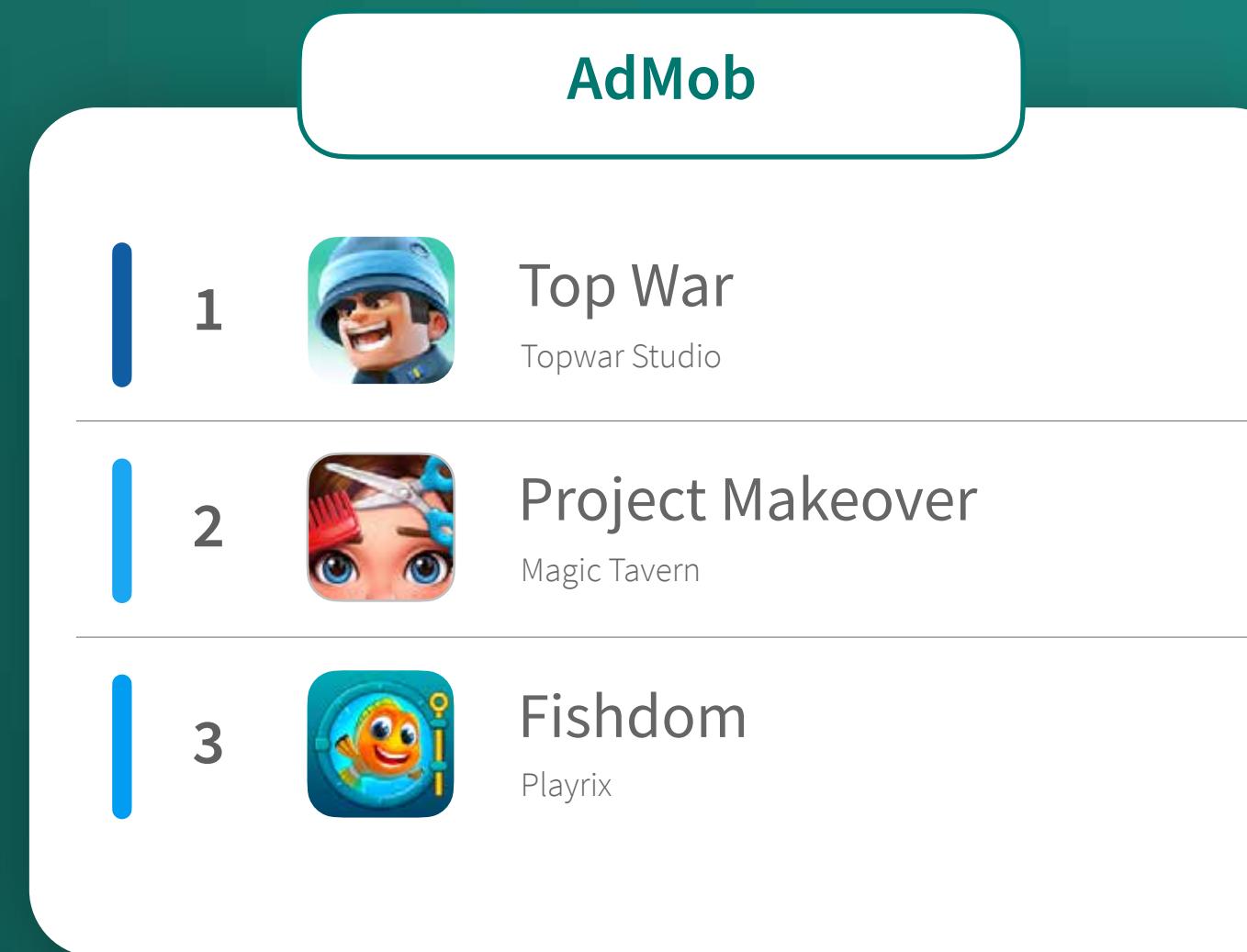
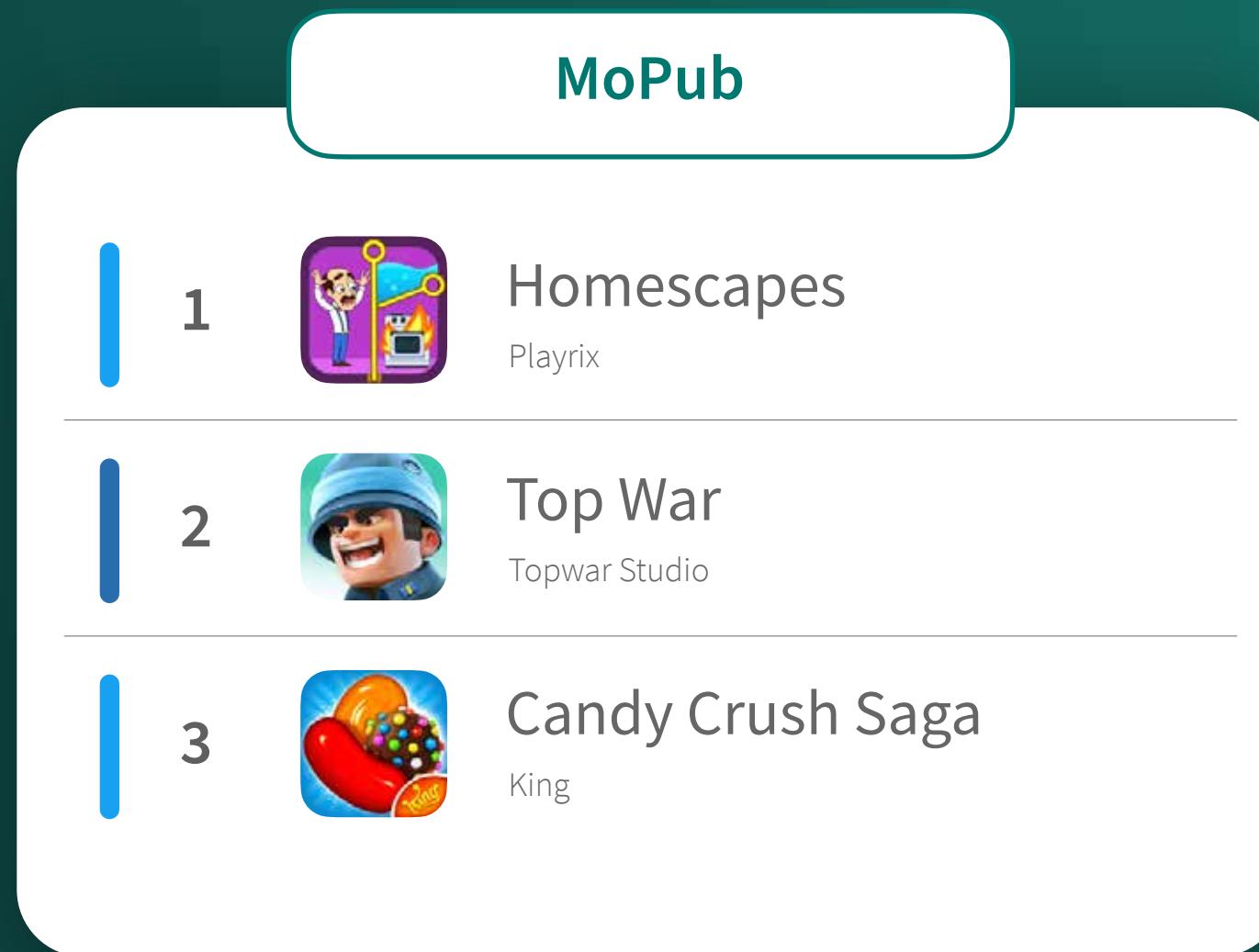
Many Puzzle Games Were Top Advertisers on Gaming-Focused Networks

Top games by U.S. iOS share of voice in H1 2021 by ad network



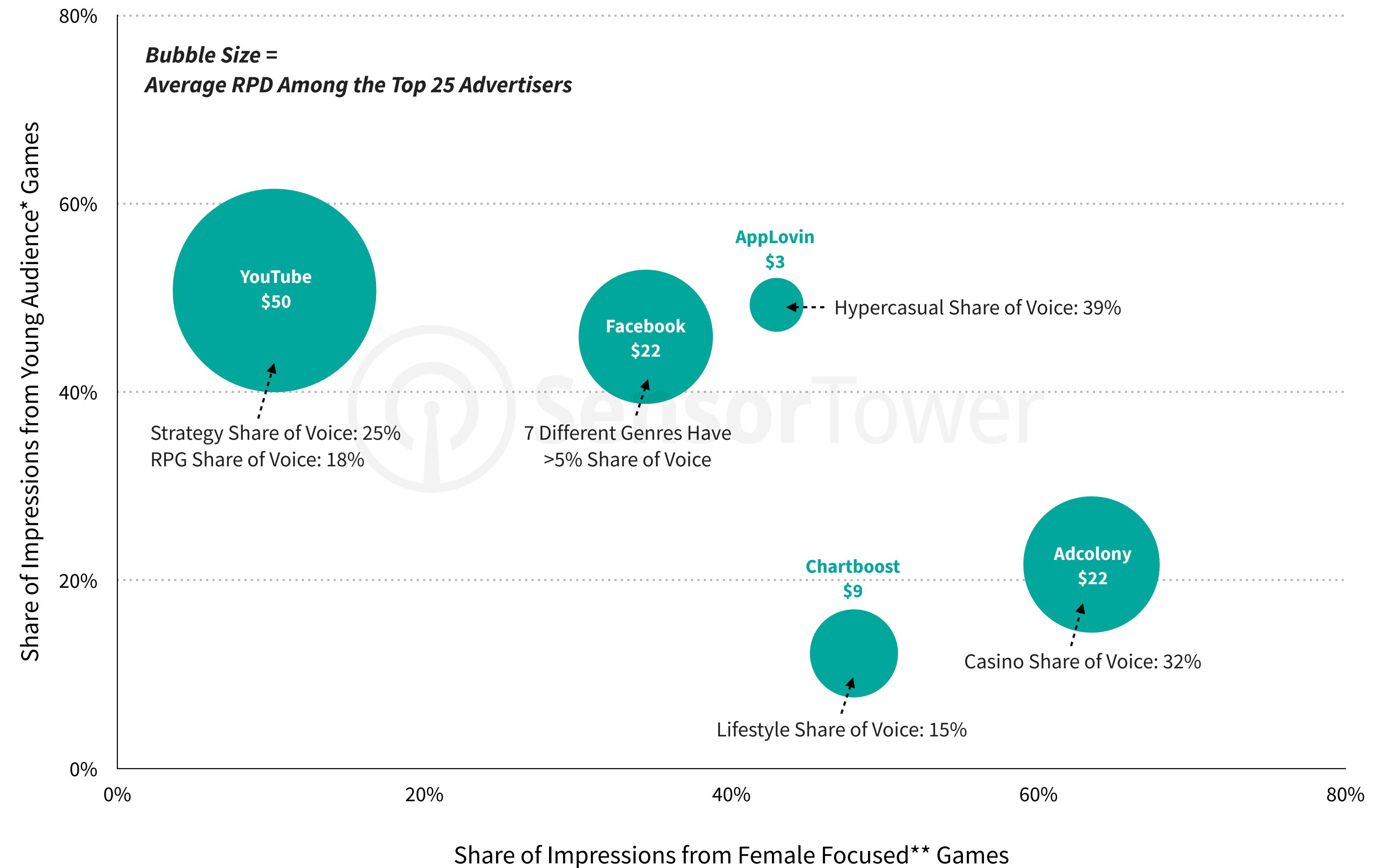
Mid-Core Games Were Top Advertisers on Less Game-Focused Networks

Top games by U.S. iOS share of voice in H1 2021 by ad network



Clearly Defined Target Demographics Can Aid Network Choice

Game advertiser demographics and revenue per download (RPD) by ad network, U.S. iOS



Top ad networks for certain game genres tend to align with their user base demographics. For example, Casino games had their highest SOV on Adcolony, a network typically used by games with an older and more female audience.

Meanwhile, YouTube advertisers were more likely to have a younger and more male user base, and high RPD (driven by the prevalence of mid-core games). Strategy games and RPGs had a relatively high SOV on YouTube's network.

Note:

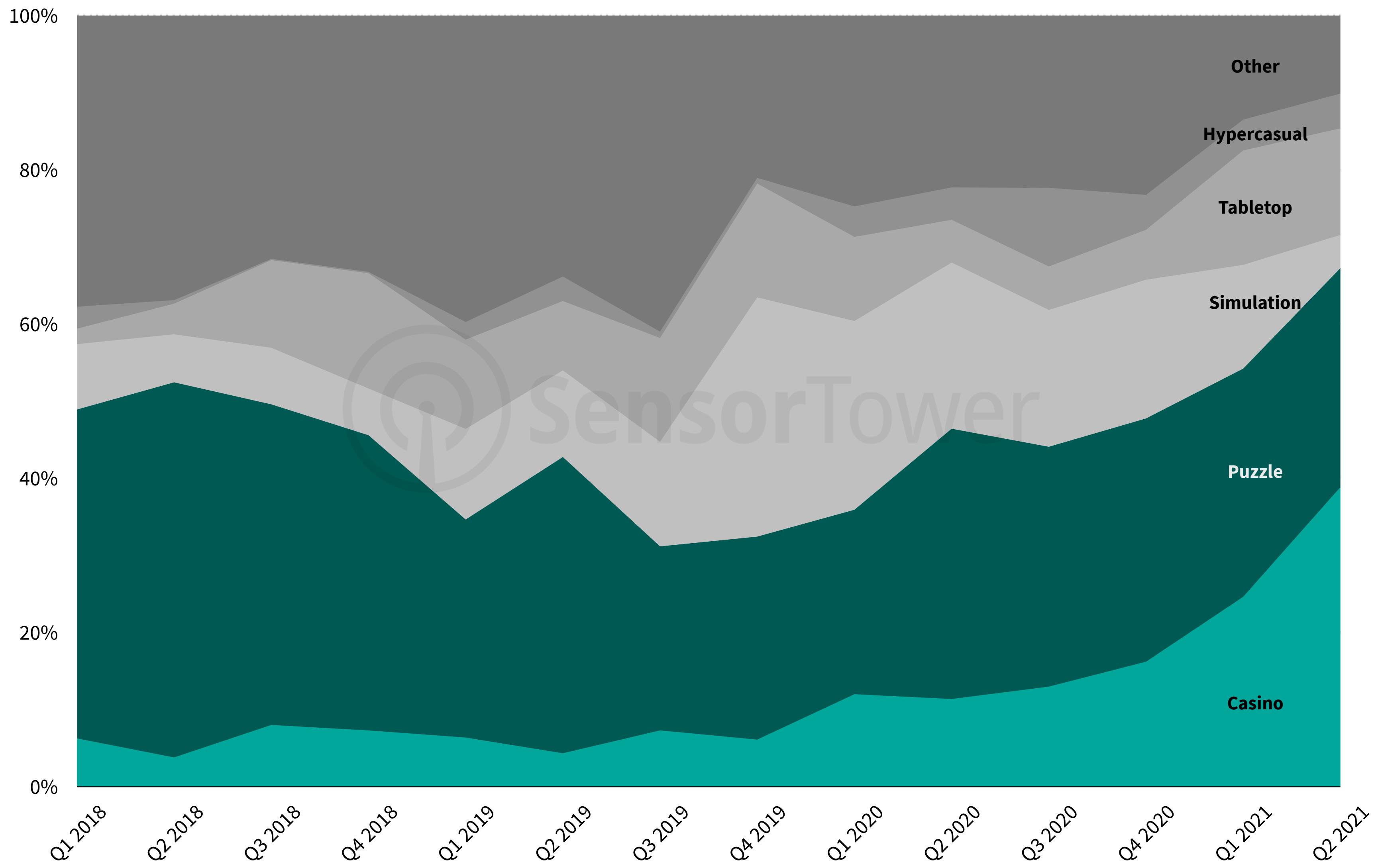
All data is for H1 2021.

*Younger audience games are defined as having an average user age of < 30 years.

**Female focused games are defined as having at least 60 percent female users.

Casino Games Have Flocked to Adcolony in H1 2021

Adcolony U.S. iOS share of voice among game advertisers, Q1 2018 - Q2 2021



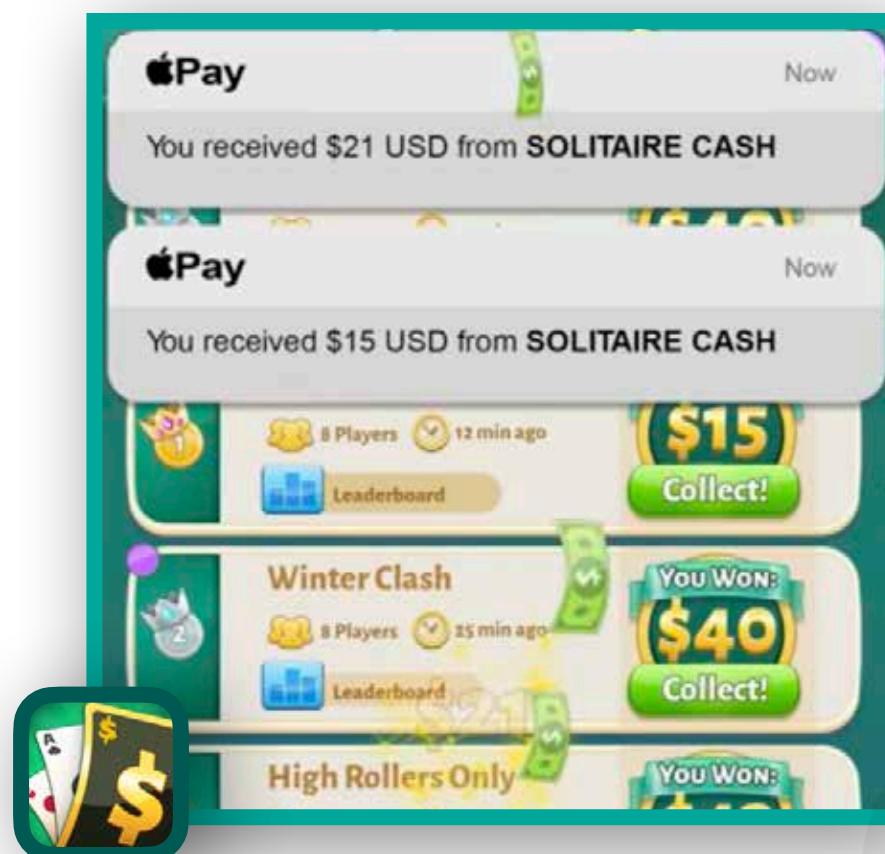
Casino games gained share of voice on Adcolony since the start of 2020, and their share continued to grow into 2021. By Q2 2021, Casino was the top genre on the network with nearly 40 percent SOV.

Three of the top four advertisers by SOV in Q2 2021 were Casino games, with Blackout Bingo (No. 1), Bingo Clash (2), and Pocket7Games (4). Puzzle still had three games among the top 10, including two games from Playrix: Homescapes and Gardenscapes.

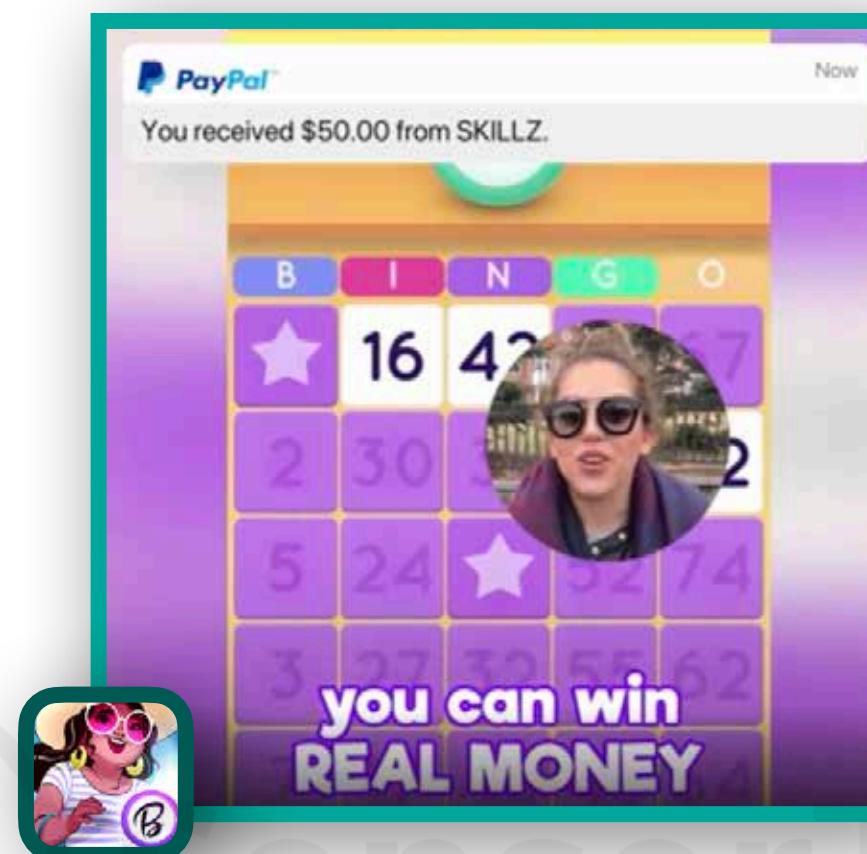
Adcolony Creatives Focus on Real Money Rewards

Top creatives by U.S. iOS share of voice on Adcolony, Q2 2021

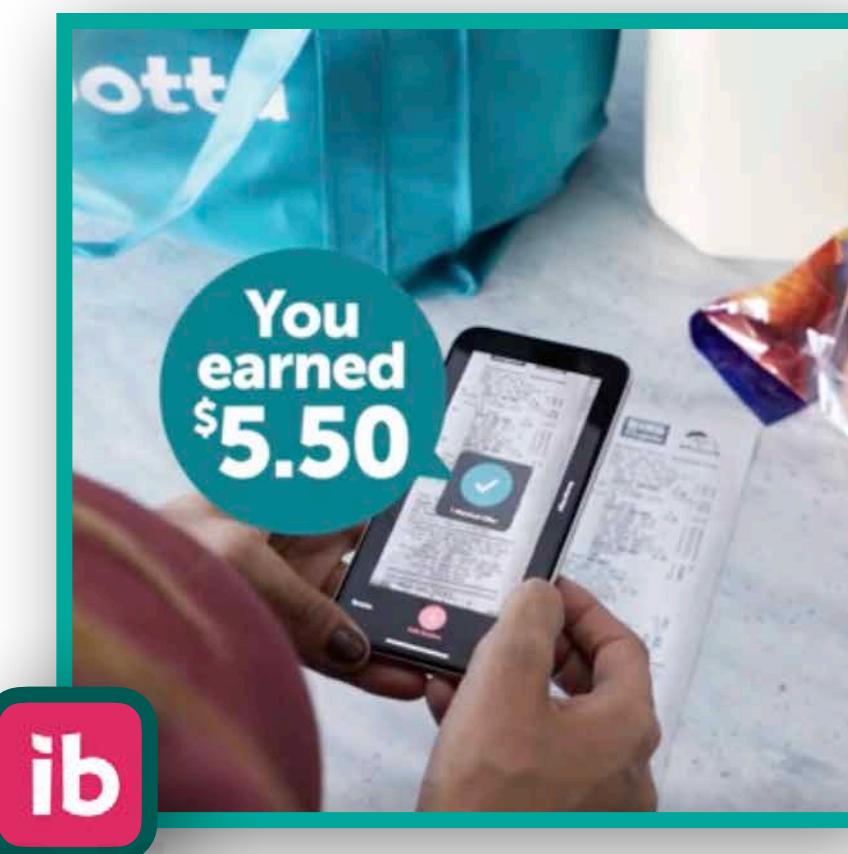
- 1 Solitaire Cash
Papaya Gaming



- 2 Blackout Bingo
Big Run Studios



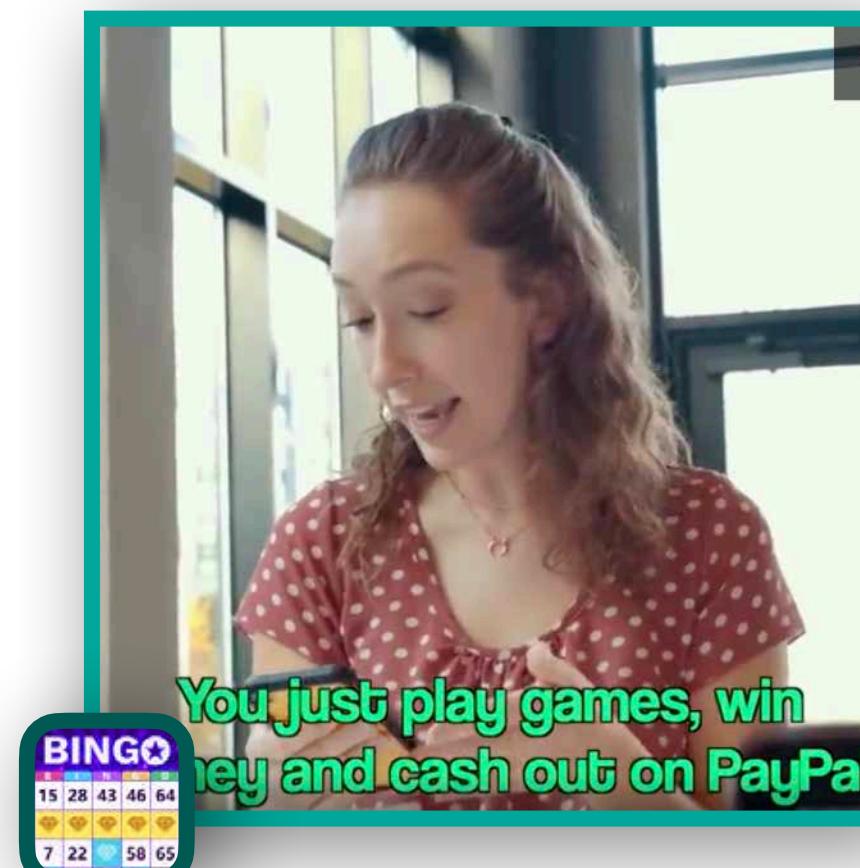
- 3 Ibotta
Ibotta



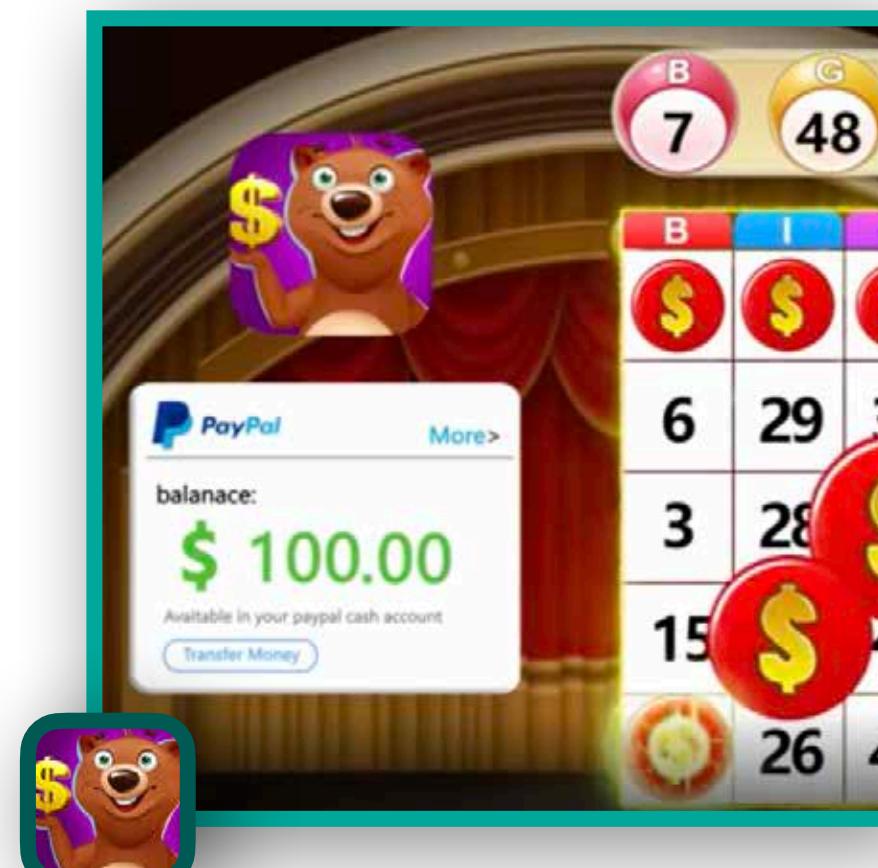
- 4 Bingo Clash
Aviagames



- 5 Bingo Clash
Aviagames



- 6 Pocket7Games
Aviagames



Game Genre Trends

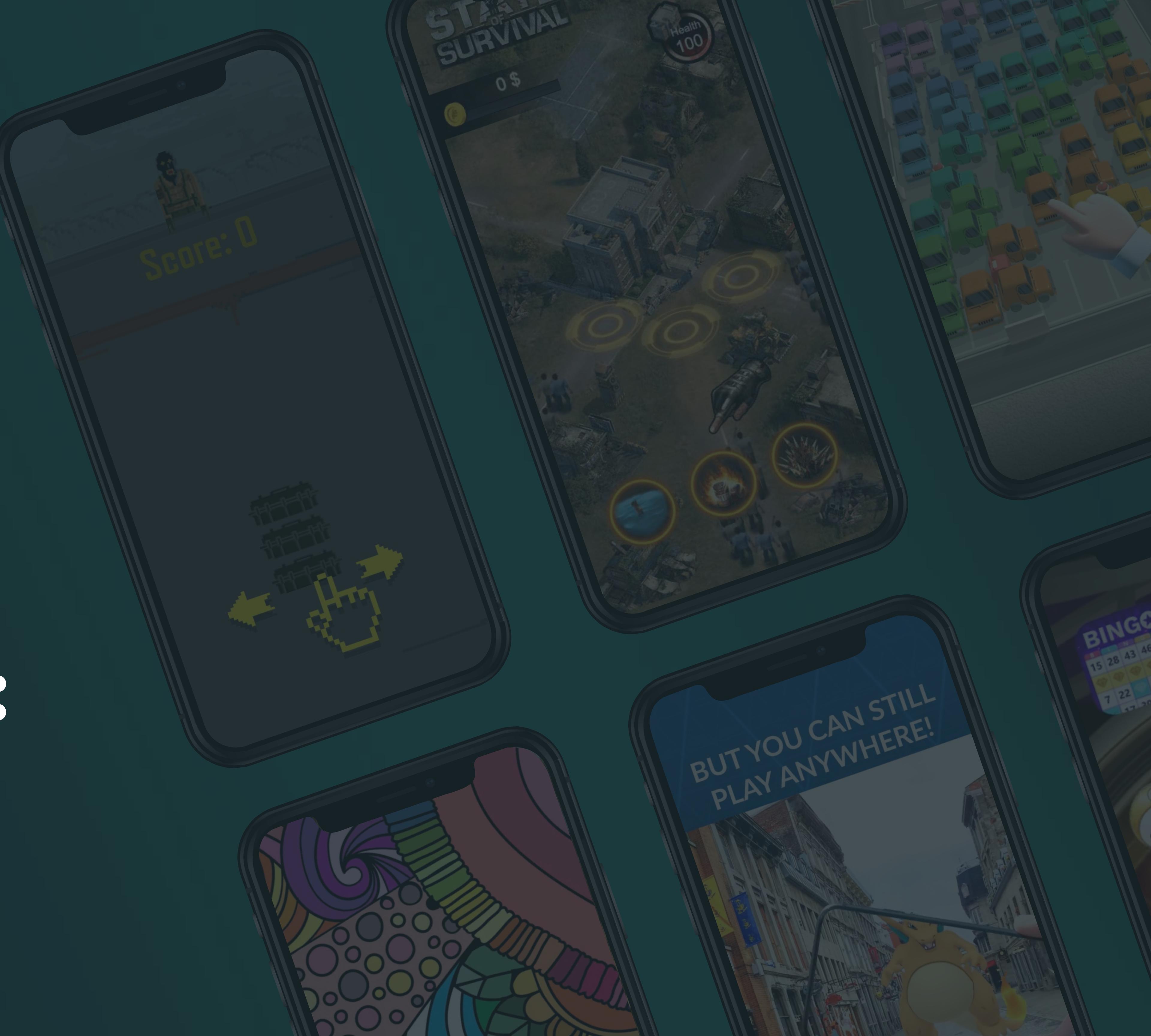
Advertisers looking to promote real money rewards flocked to Adcolony in Q2 2021. Many game creatives highlighted how players could win real money using Apple Pay or PayPal.

Even non-game apps promoted cash rewards on Adcolony. Ibotta, a shopping cash back app, was among the top five advertisers on Adcolony and highlighted the money consumers could earn by submitting receipts.



Creative Trends: United States

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Game Advertising Creative Trends



Creative Trends: United States

1

Fake Playables

Videos mirroring playable ads have been popular among Hypercasual and Puzzle games. Zynga took this a step further, running a creative with a video simulating the start of playable ad.

2

Relaxing Music

Using background music in ads provides a way for casual games to distinguish themselves from each other. While a variety music is used in ads, some casual game advertisers have turned to calming music to present their titles as relaxing.

3

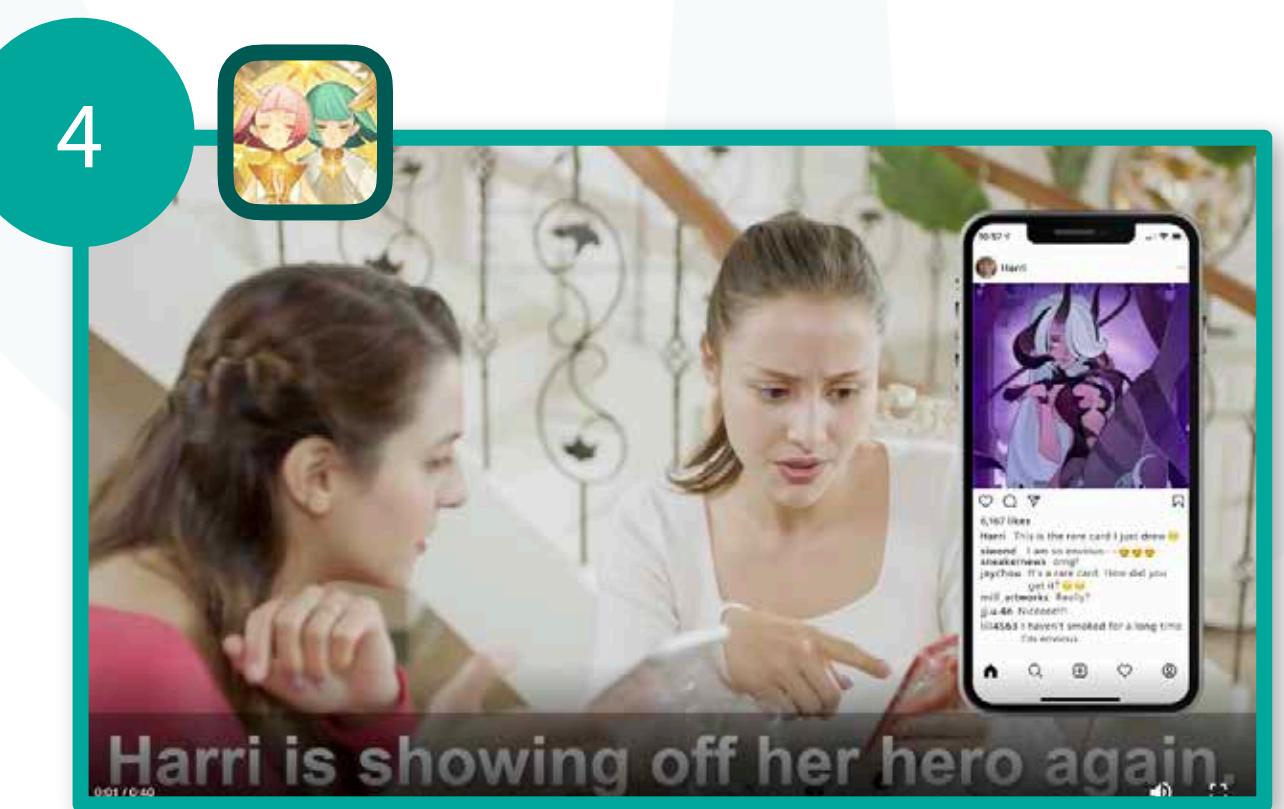
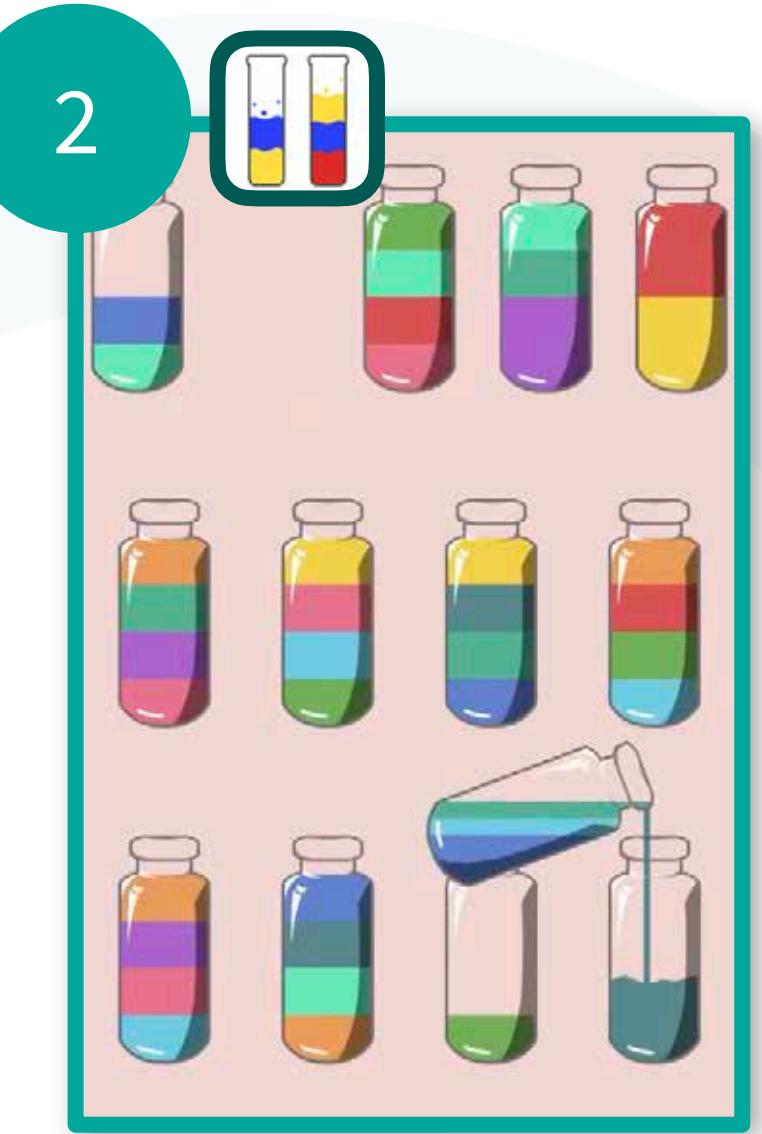
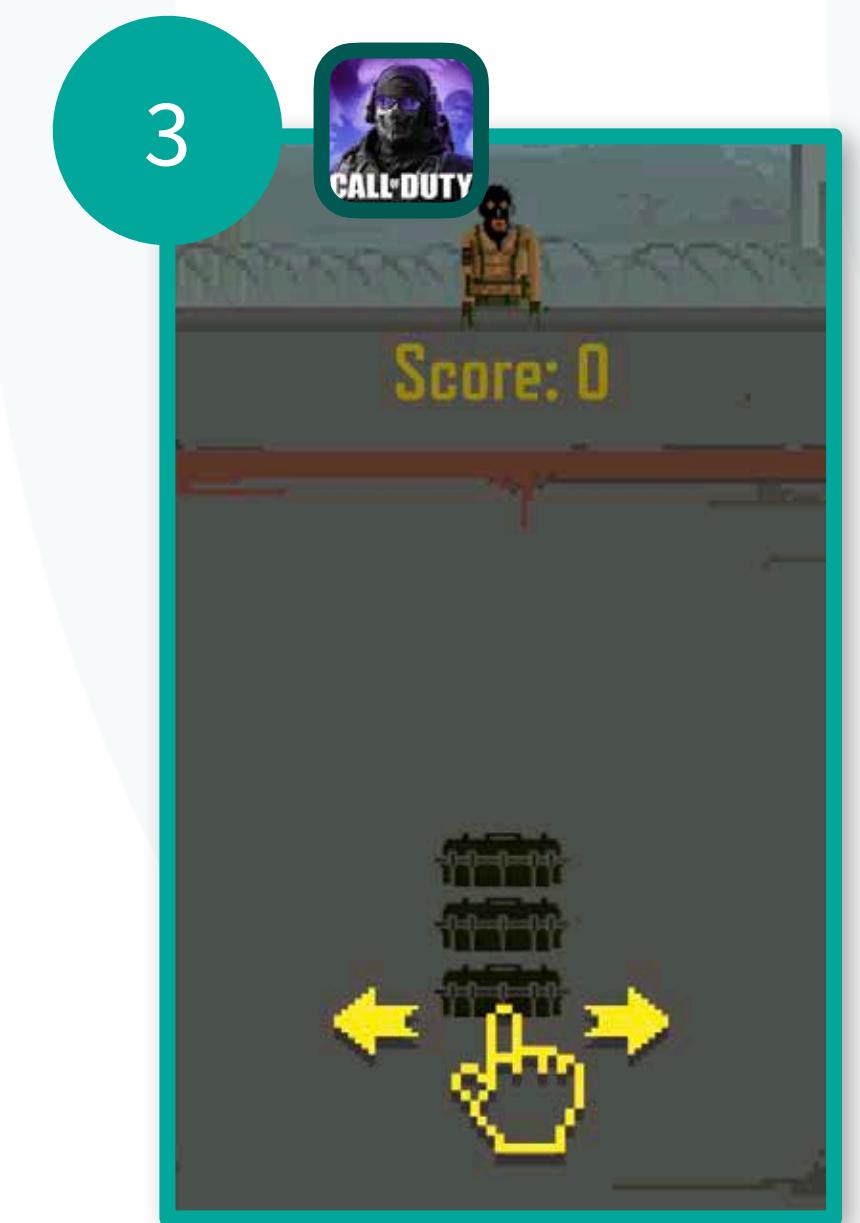
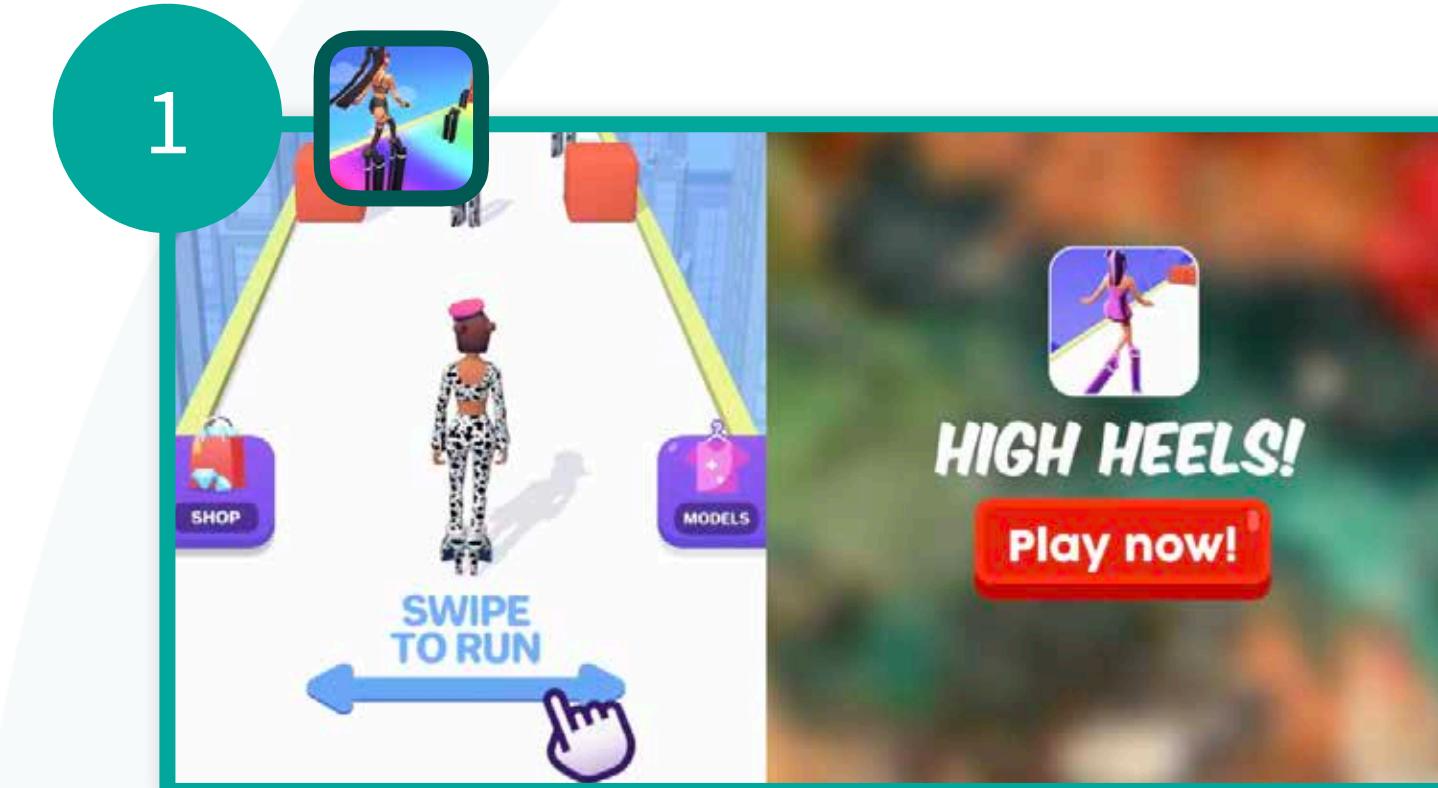
Playables for Mid-Core Games

A couple of the most popular mid-core titles have adopted simple playable ads that don't completely match the their more complicated gameplay. Examples include Call of Duty: Mobile and State of Survival.

4

Real-World Conversations

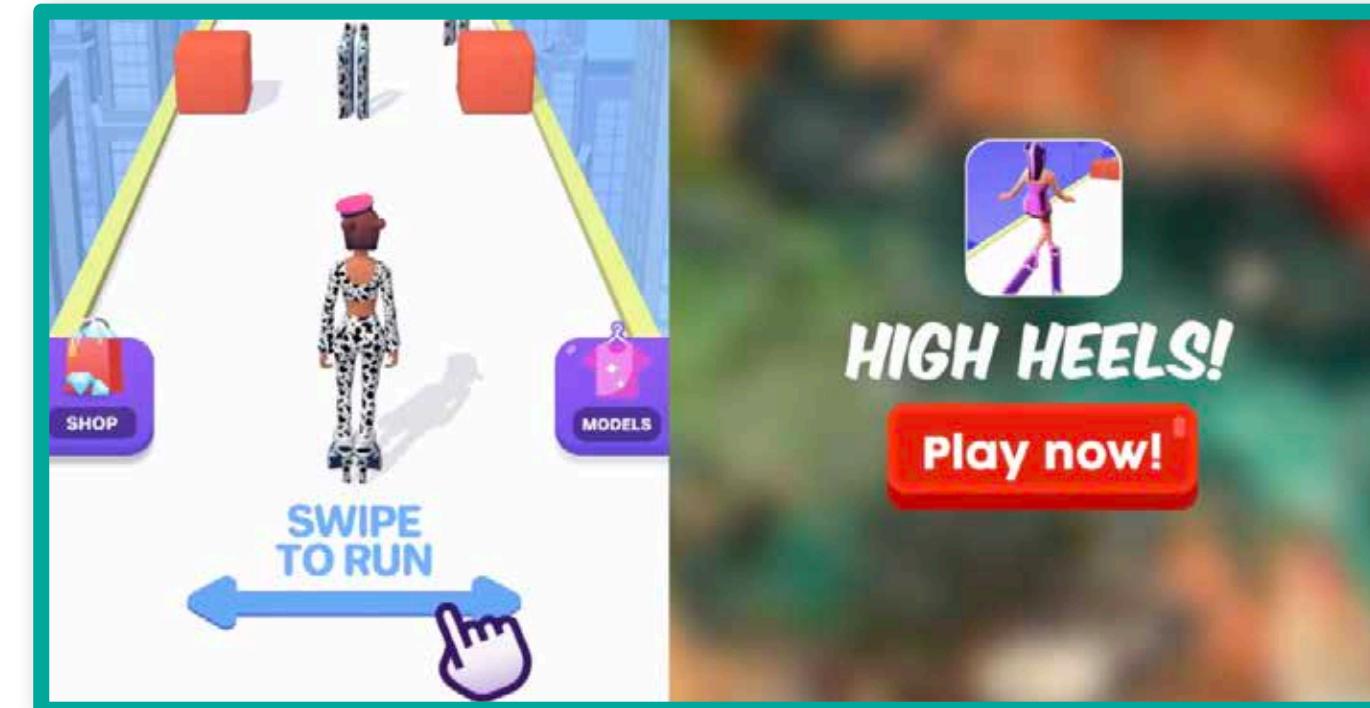
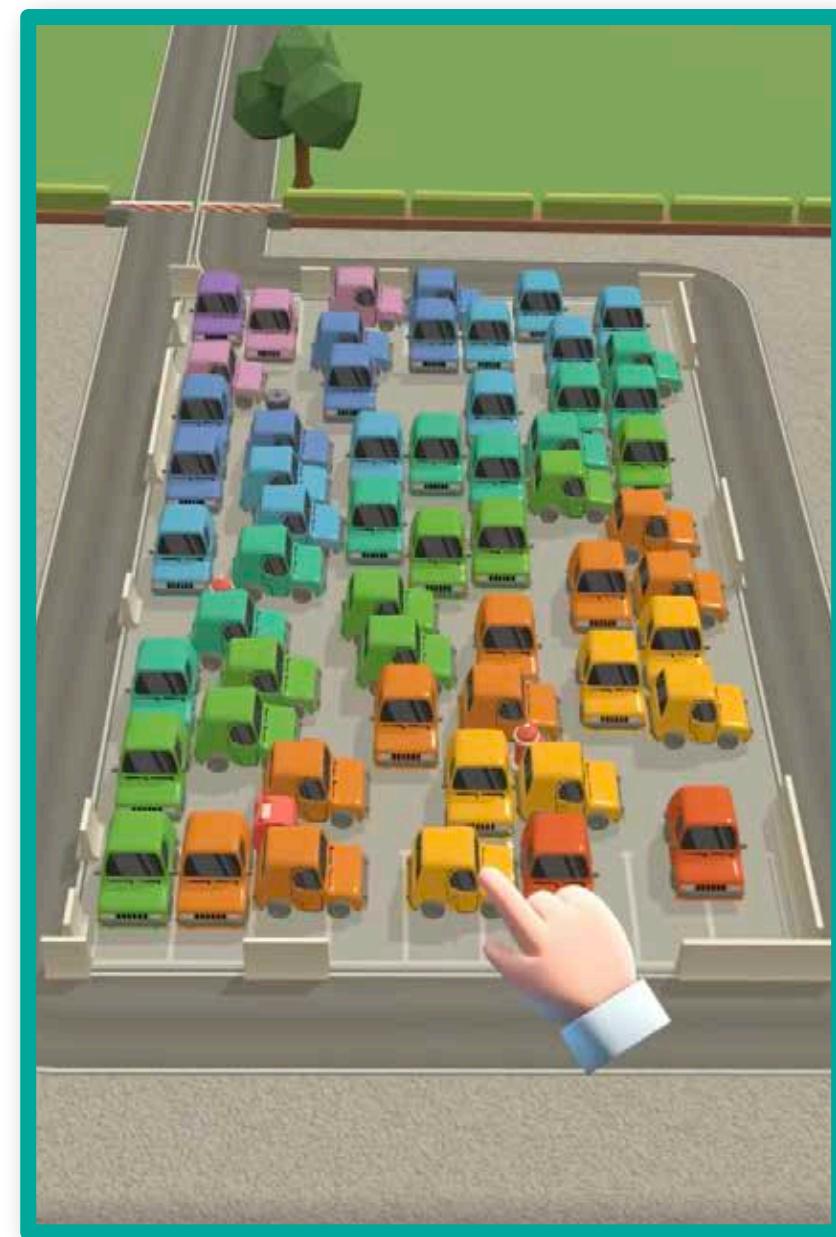
Some top advertisers have adopted video creatives where players discuss game strategies or rewards. This strategy is similar to that seen in the Casino genre where a player talks about how they earned real money.



Zynga Experimented with Video Creatives Imitating Playables

Examples of fake playable creatives

1 Fake Playables



Game publishers have traditionally used videos that look similar to playable ads, with an example player proceeding through a level. While these ads don't have the same level of interaction as a playable, they can still highlight the main components of gameplay, especially for simpler titles.

Zynga took this a step further by running a video creative that mirrors the introduction to a playable ad. This quick introduction tempts viewers to download the game in order to see what the gameplay is actually like.

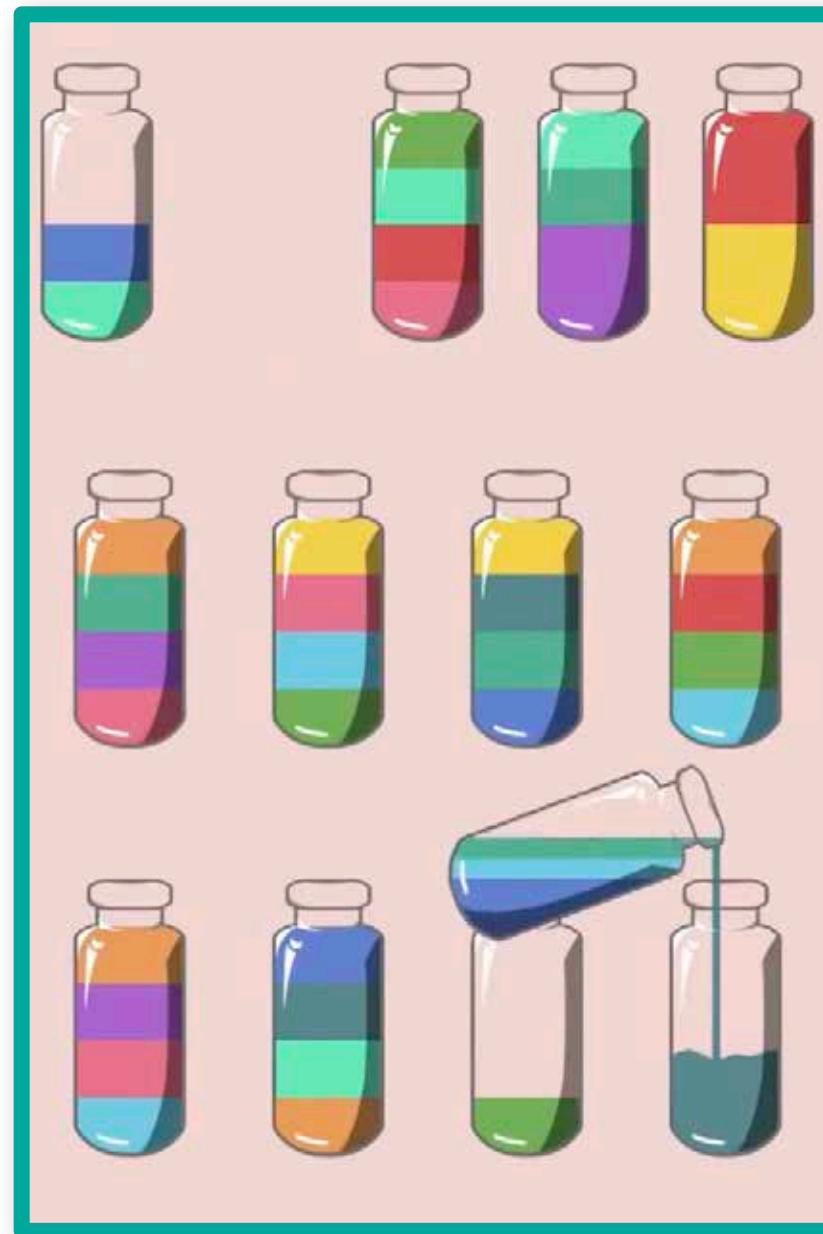
Hypercasual Game Ads Experimented with Background Music

Examples of video creatives with relaxing music

2 Relaxing Music



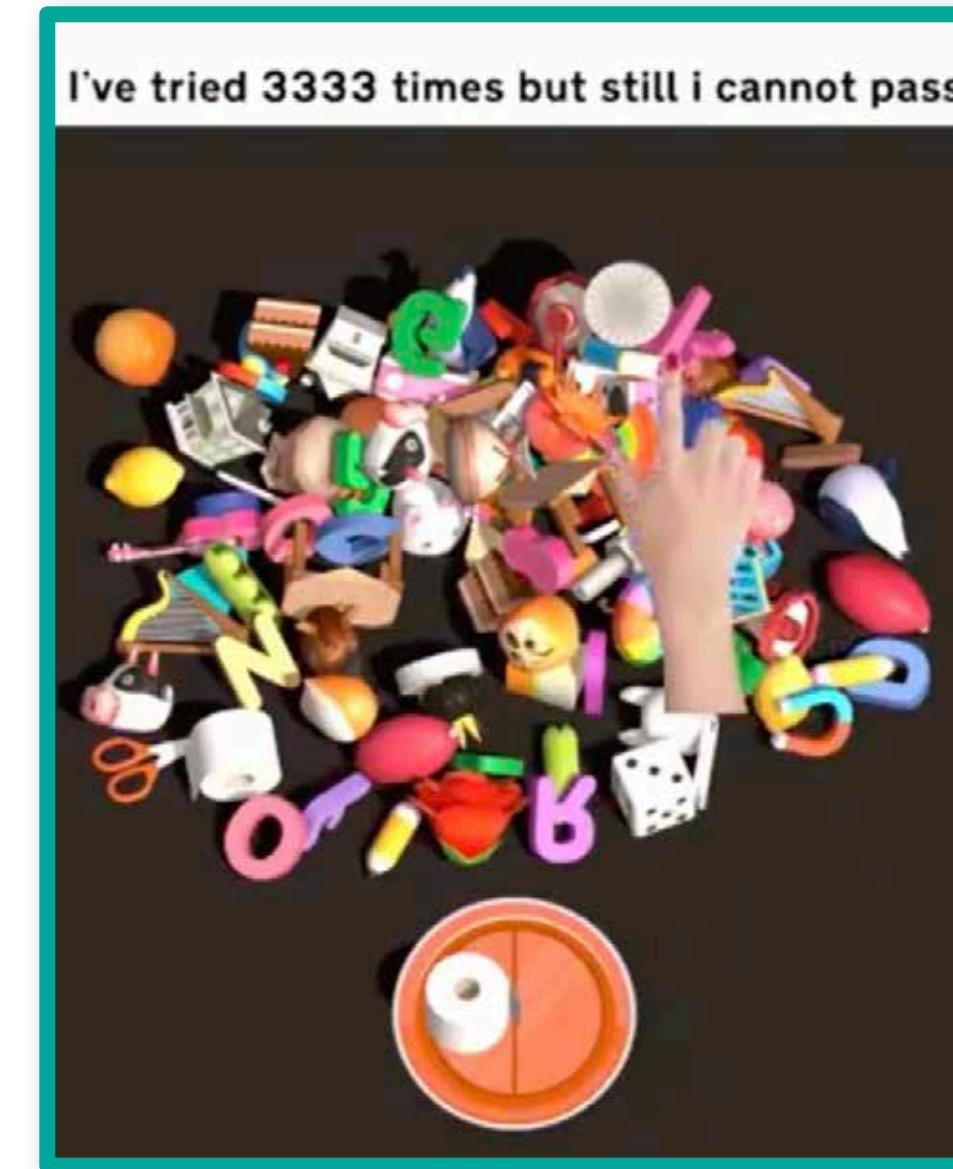
Water Sort Puzzle
IEC Global



Vungle



Match 3D
Loop Games



Facebook



Happy Color
X-Flow



Unity

Games use a variety of background music in their ad creatives to help them stand out. While this music is often loud and upbeat, some advertisers have tried calmer music to make their games seem more relaxing.

This strategy is particularly common for Puzzle games that can be marketed as relaxing, although it's used by some Hypercasual games as well. Water Sort Puzzle is an example of a Puzzle game that has calming creatives with piano or string music.

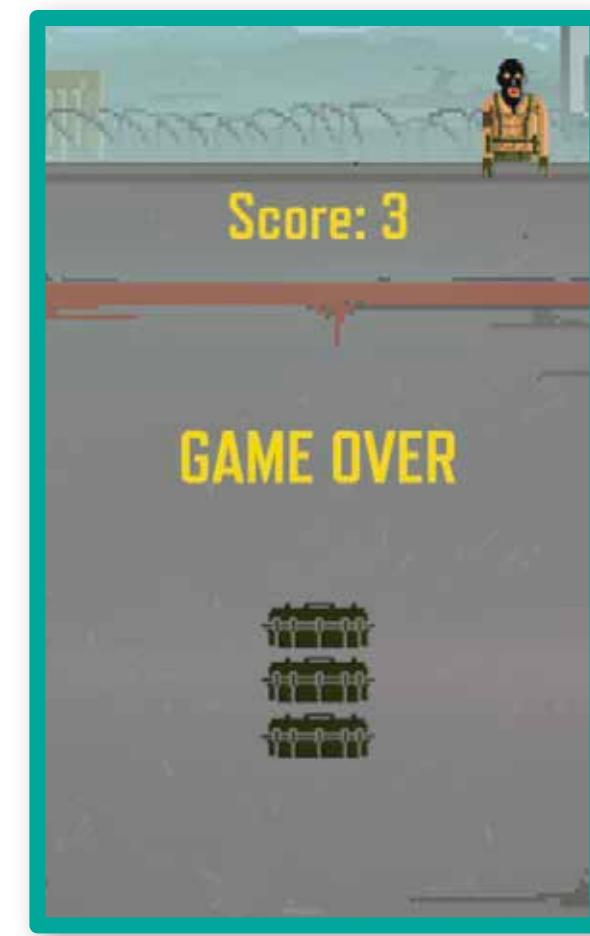
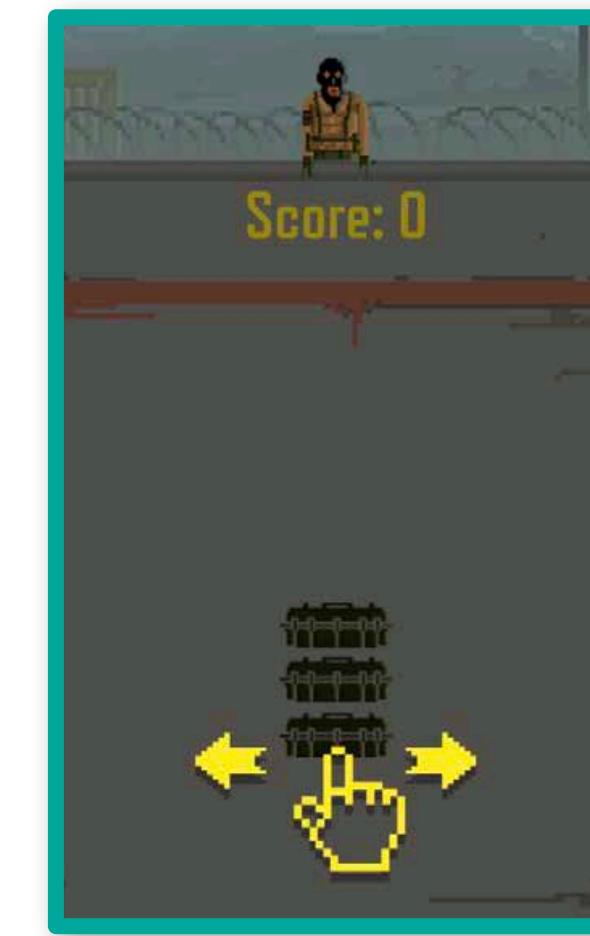
Mid-Core Games Turn to Playables

Examples of playable creatives for mid-core games

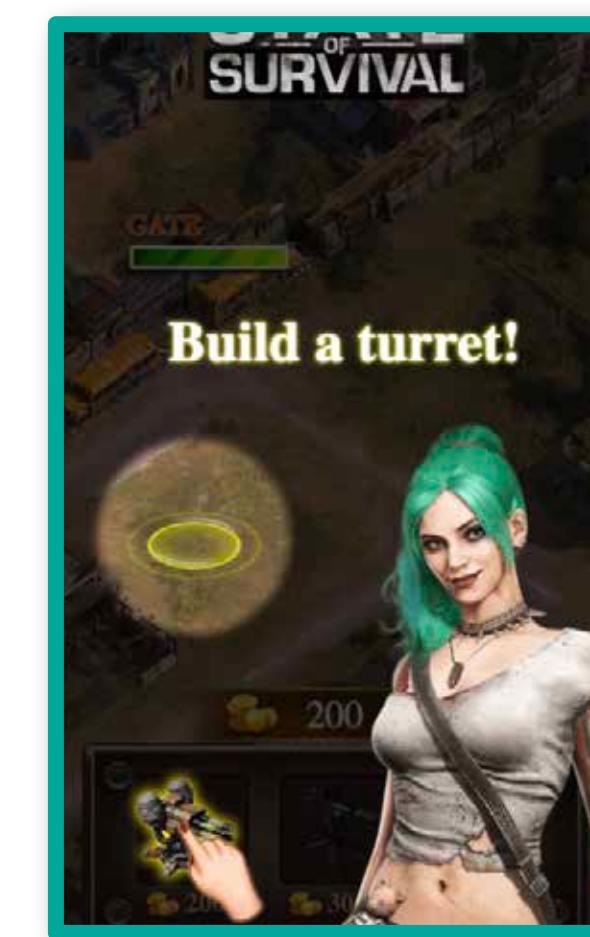
3 Playables for Mid-Core Games



Call of Duty: Mobile
Activision Blizzard



State of Survival
FunPlus



A few top mid-core games have turned to using simple playable ads. Call of Duty: Mobile traditionally relied on video ads with a narrative and focused on actual gameplay. However, it has recently adopted a simple mini-game on networks including MoPub and Vungle.

State of Survival has also used playable ads to drive user acquisition. While the playable ads need to be much simpler than the title's actual gameplay, their adoption by these popular mid-core games suggest that they can still be a useful driver of new users.

Games Include Conversations About Strategies and Rewards

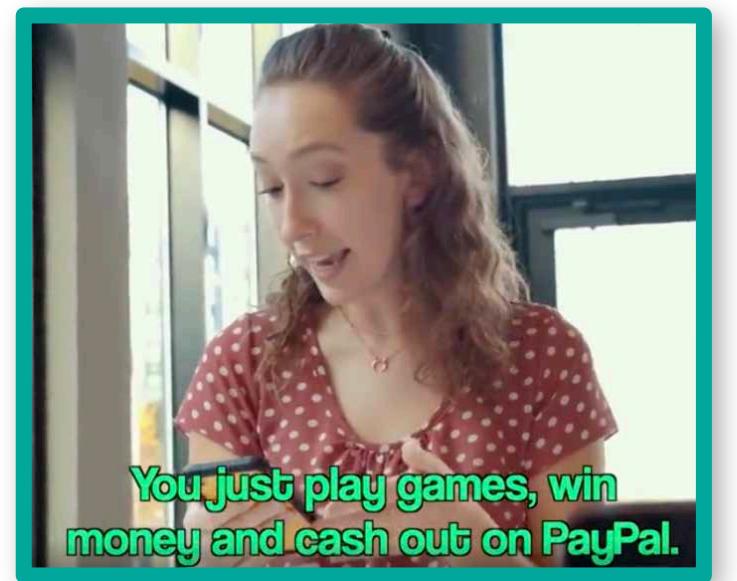
Examples of creatives with real-world conversations

4

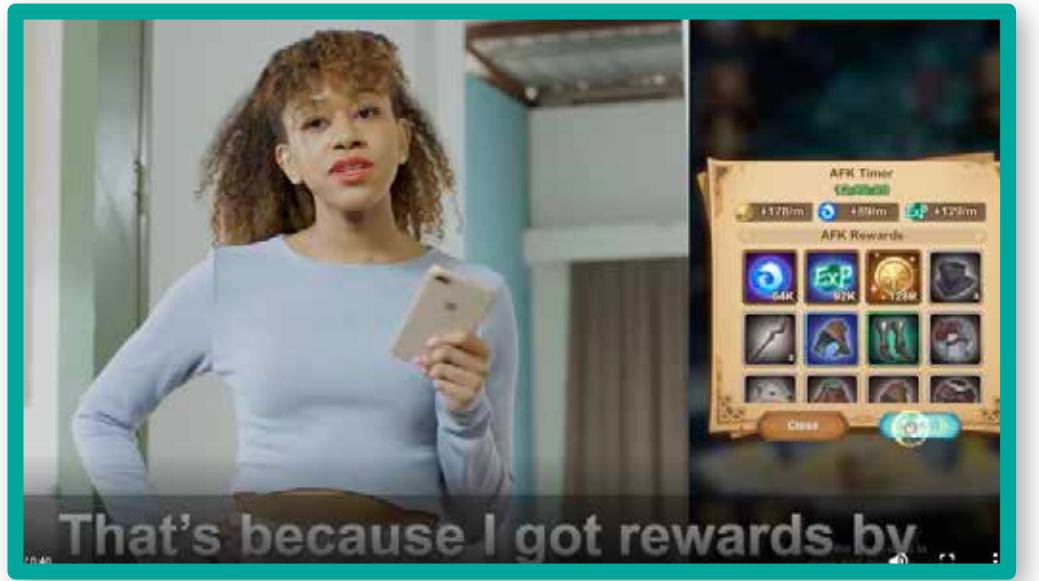
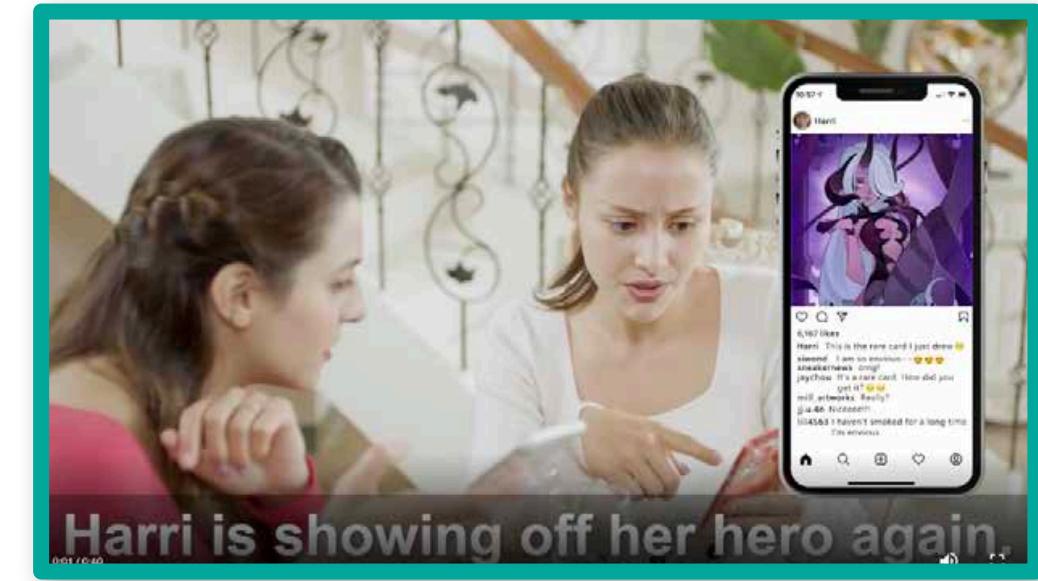
Real-World Conversations



Bingo Clash
Aviagames



AFK Arena
Lilith Games



YouTube



Magic: The
Gathering Arena
Wizards of the Coast



YouTube

Some top advertisers have explored video creatives that include little to no actual gameplay, instead featuring players discussing the game. This is a common strategy for titles with real money rewards, as they can highlight someone learning about the opportunity to make money from a game and feeling left out.

AFK Arena has several ad creatives that show players discussing different strategies and how to progress through the game more quickly, again capitalizing on players feeling like they are missing out on an opportunity. Magic: The Gathering Arena even included celebrities in a recent ad.



Conclusion

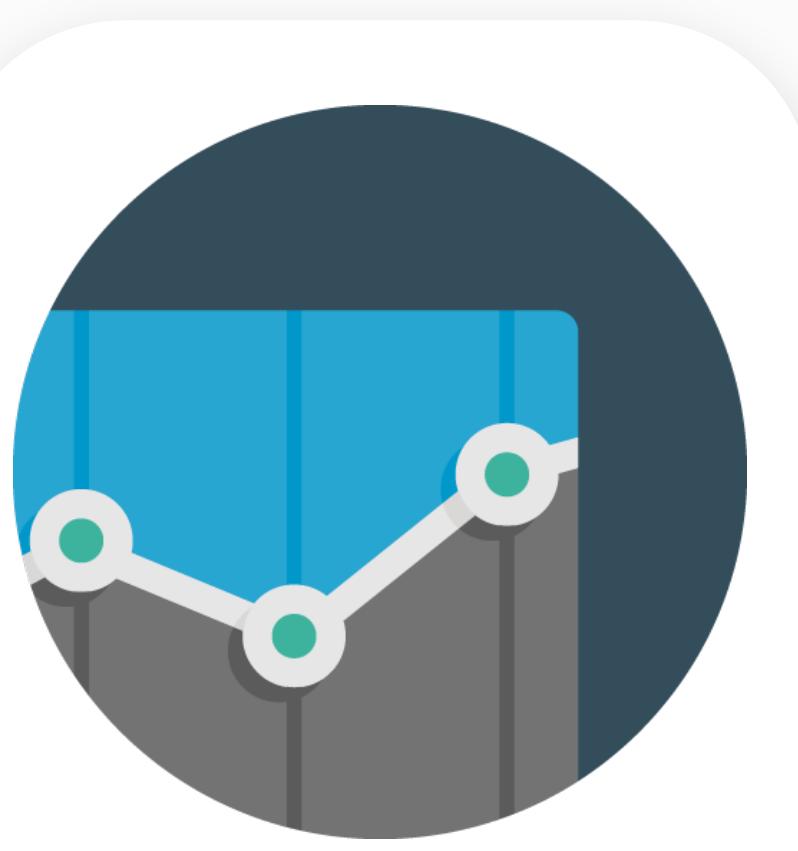
Key Takeaways from the Report

Conclusion

- Despite concerns about the impact of IDFA, mobile game advertising trends have held steady into 2021, with many ad networks even seeing an uptick share of voice from games. While the long-term impacts of IDFA are yet to be seen, it does not appear that mobile game advertising has experienced any immediate, substantial ill effects in the first half of 2021.
- Game advertisers can find success by using ad networks that fit their target demographic group. YouTube is a popular network for the Strategy and RPG genres since many of its advertisers have a younger, more male audience. Meanwhile, Adcolony is more commonly used by games with an older, more female audience, making it a good option for Casino games.
- For casual and mid-core game publishers alike, staying on top of recent ad creative trends can help spark ideas to improve user acquisition. For example, some top mid-core games like Call of Duty: Mobile have experimented with using simple “mini-games” in playable ads to boost adoption, suggesting that this approach can be useful even for games with more complex gameplay.

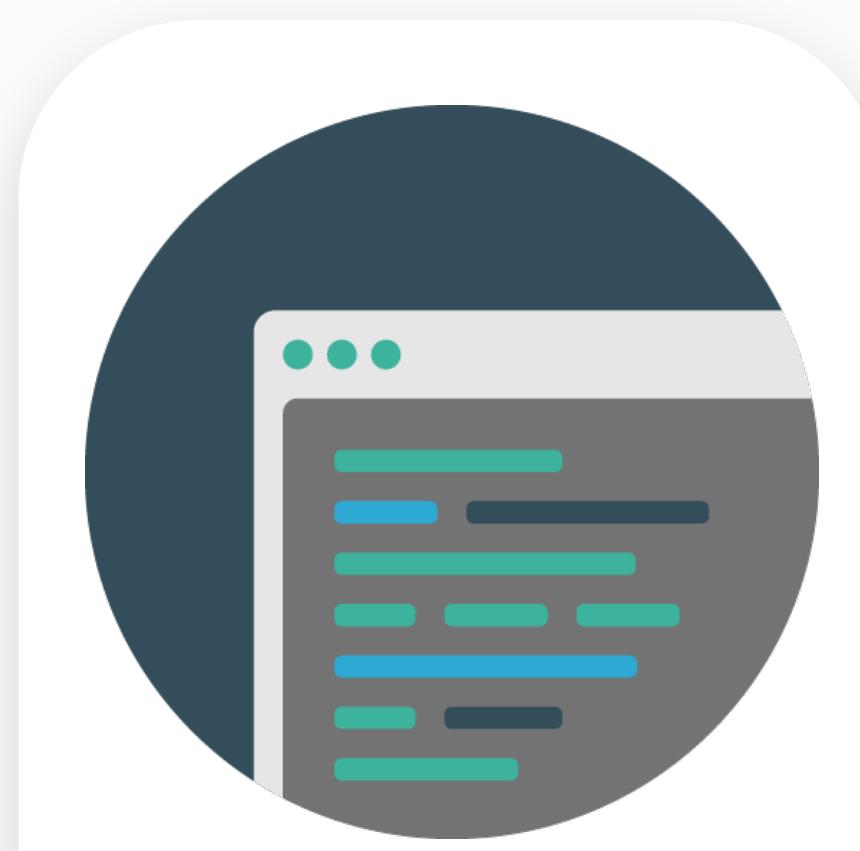


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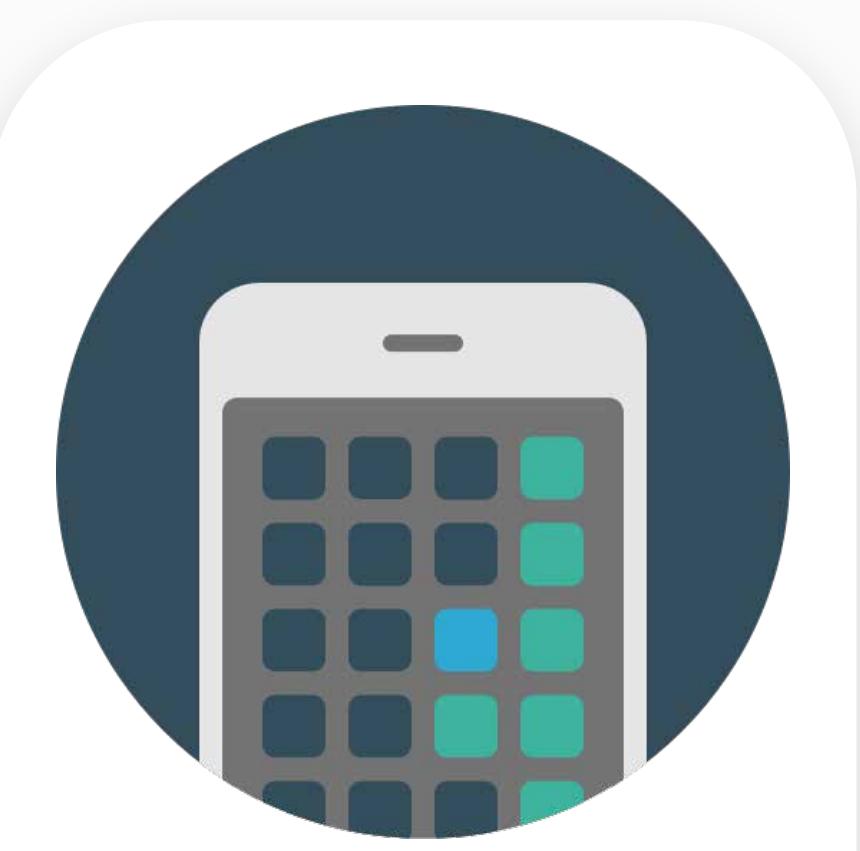
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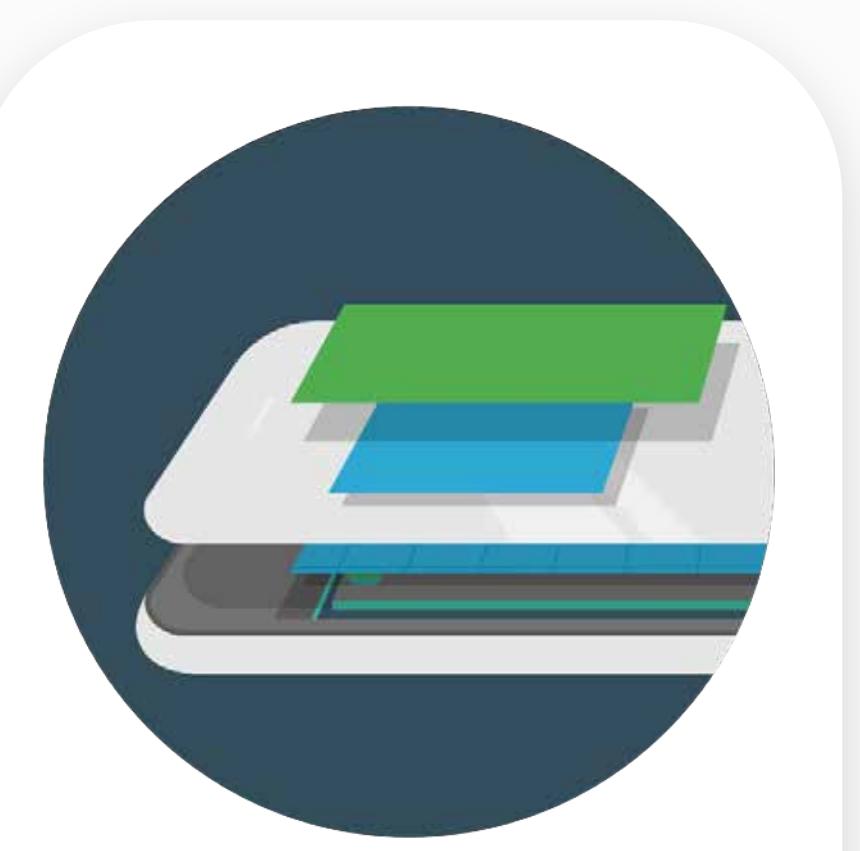
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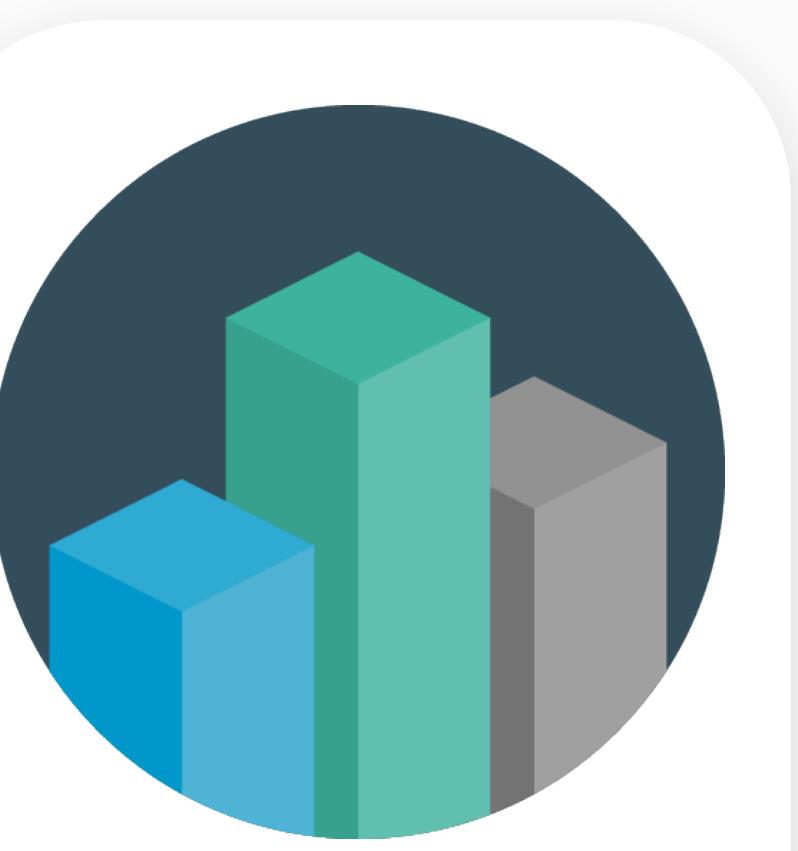
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App Teardown

Evaluate which SDKs apps are using and measure SDK adoption across market segments.



Consumer Intelligence

Access unfiltered mobile user engagement for financial analysis.

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