



Insights into Global Mobile Game Marketing & Ad Spend Trends for H1 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](http://www.socialpeta.com)



Tenjin offers a free-to-start, pay-as-you-grow advertising measurement solution for mobile game developers.

Empowering mobile publishers with a distinctive approach to growth analytics, Tenjin enables them to punch above their weight.

Starting from \$300 per month, Tenjin users get access to all available products with no hidden costs or add-ons.

Tenjin played a crucial role in the growth of studios, including Ruby Games, Voodoo, Kooapps, and SayGames, and is currently trusted by more than 25,000 apps and 300 platform partners.



Best Est. ROI
Summer 2024



Easiest to use
Summer 2024



Easiest Setup
Summer 2024



Best Support
Summer 2024



Highest User
Adoption
Summer 2024



Fastest
Implementation
Summer 2024

[Website: www.tenjin.com](https://www.tenjin.com)

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H1 2024 Exclusive Insights into the Marketing of Games



Industry Insight

Industry Insights

Regarding the top strategies for user acquisition, the key to success lies in thorough and constant ambivalent adaptation. The goal isn't just to find the cheapest or highest-paying audience but to reach all potential users your product can possibly get.

At AdQuantum, we continuously analyze the cost of user acquisition alongside audience behavioral metrics. Finding a new winning creative approach can lead to profit growth if you measure results correctly. It's unfortunate how often campaigns or sources are scaled prematurely. So, accurately developing your creative approach (you should understand why exactly you're making this specific creative), continuously reaching, estimating, and re-estimating specific audience segments, and scaling gradually will eventually lead to your product's success.

Considering the biggest challenges, the gaming industry thrived during the pandemic, along with remote education and fitness apps. However, nothing lasts forever. Now, we have to deal with the tough competition on the market combined with the SKAN difficulties everyone's already used to.

The real competition isn't just for installs but for users' time. Ads must be captivating, and onboarding should be engaging. Given the increased UA costs, it's crucial to make the entire user journey and monetization process enjoyable and valuable. A long user lifetime is where developers can truly benefit.

Upon said, taligning your creative approach with users' actual motivations is essential, necessitating harmonious collaboration among the development, creative, and UA teams.

Roman Korotin
Partner Manager at [AdQuantum](#)

I know this is NOT a new strategy, but offering users subscriptions is a game changer.

When looking at the revenue splits (for our top game clients) between subscriptions, in-app purchases, and ad revenue, we are seeing a lot more sales coming from subscriptions.

This also allows you to NOT be reliant on ads which is primarily dependent on the economy.

If you have a puzzle game or any game with new content, start incorporating subscriptions and show this subscription paywall during the onboarding process.

Games can still offer in-app purchases and show ads, but having subscriptions will allow you to grow faster and have a more stable revenue stream.

As much as non-games have borrowed strategies from the gaming industry, it's time for the gaming industry to start adopting some strategies from the top subscription apps.

Steve P. Young
CEO & Founder at [App Masters](#)

Industry Insights



The gaming industry is set for major changes in the coming years, shaped by several key trends:

- **Mobile and 5G:** The expansion of 5G networks will revolutionise mobile gaming with faster speeds and lower delays, enhancing the overall gaming experience and user engagement.
- **AI Personalisation:** AI will significantly impact gaming by offering personalised experiences through data analysis, which will help tailor content, recommendations, and ads to individual users, boosting satisfaction and retention.
- **AR and VR:** The use of Augmented Reality (AR) and Virtual Reality (VR) in gaming will provide unique, immersive experiences, driving greater user interaction and loyalty.
- **Privacy Concerns:** As data privacy becomes more critical, game developers will need to ensure transparent and secure handling of user data to maintain trust.
- **Targeted Advertising:** Ads will become more relevant and engaging by leveraging user context and behaviour, improving click-through rates and ad revenue.
- **App Store Optimisation:** Staying updated with App Store Optimisation (ASO) practices will be essential for maintaining visibility and acquiring users as App Store algorithms and search behaviours evolve.
- **Programmatic Advertising:** The use of automated, data-driven advertising will improve targeting and ad placement, maximising return on ad spend (ROAS).
- **Attribution Models:** Adapting to new attribution models, like SKAdNetwork, will be crucial for accurately measuring ad performance and user acquisition after the decline of traditional identifiers.

Fátima Castro
Product Marketing Specialist at [Gamelight](#)

Industry Insights

Globally, there's an uptrend in monetization strategies within the gaming sector. Hyper Casual games are leading in ad revenue generation across six different ad networks. Game developers are increasingly adopting innovative monetization methods, with significant interest in hybrid casual games and the introduction of novel advertising formats and mechanisms, such as **Rewarded Playtime**.

The hype around **Rewarded Playtime** in gaming is significant, with one-quarter of players surveyed showing a preference for adding games that offer real-world rewards, like gift cards, to their mobile gaming repertoire or even switching to them entirely. The ability to earn tangible rewards through gameplay is a strong motivator. Moreover, if players find a game enjoyable, there's a 64% likelihood they'll explore other games by the same publisher, benefiting advertisers through potential cross-promotion and enhancing the lifetime value (LTV) of their entire game portfolio. In simple terms, the more a user plays, the more they earn!

A substantial 84% of users expressed interest in starting games that provide real rewards. About 76% of gamers tend to alternate between two to seven games weekly. Additionally, 53% of gamers reported spending money on a single game. For casual games advertisers, this set of users are highly crucial as this economy & behavior of gamers is quite different from what they see in traditional channels.

Rewarded Playtime also has a massive benefit for publishers who are seeking to monetize their app. This channel of Monetization has yielded an increase of 2.7x in eCPMs compared to traditional rewarded placements like an offerwall.

Read More about Rewarded Playtime on AppSamurai's website.

Faheem Saiyad
Director at [AppSamurai](#)

In today's competitive mobile gaming world, getting your game noticed and downloaded can be tough. But there's a powerful way to boost your app's presence: **combine App Store Optimization (ASO) with Apple Search Ads (ASA)**. ASO helps your app rank higher in search results organically by optimizing your store listing, while ASA puts your app at the top of search results through paid ads. When you use these strategies together, they work hand-in-hand to maximize your visibility and attract more users.

How ASA benefits ASO:

- Successful ASA campaigns identify high-performing keywords.
- Effective ad creatives can be adapted for ASO efforts.
- These insights improve organic visibility and conversion rates, helping your game rank higher in search results.

By using ASA data to refine your ASO practices, you can better optimize your app store listing, attract more high-intent users, and improve overall user acquisition.

How ASO benefits ASA:

- A fully optimized app store listing increases conversions from paid ads.
- Effective visuals and relevant keywords make users more likely to download your app when encountered via ASA.

By ensuring your listing is optimized before running ASA campaigns, you maximize the return on investment, making your ad spend more efficient. The combined power of paid and organic strategies amplifies your app's immediate reach and supports long-term growth, helping your game stay ahead in a crowded market.

Sukanya Sur
Content Marketing Manager at [AppTweak](https://www.apptweak.com)

Industry Insights



Emerging technologies like AI, VR, and AR are set to revolutionize the future of gaming by enhancing immersion, interactivity, and personalization. AI will significantly improve game design through advanced NPC behavior, procedural content generation, and adaptive gameplay, creating more dynamic and personalized gaming experiences. VR will take immersion to the next level by placing players directly into 3D environments, offering a sense of presence and engagement that traditional gaming cannot match. AR, on the other hand, will blend digital elements with the real world, enabling location-based and interactive experiences that encourage players to explore their surroundings in new and exciting ways.

Together, these technologies will foster the development of new game genres and innovative gameplay mechanics, pushing the boundaries of what games can offer. They will also enhance social interaction within games, allowing players to meet, collaborate, and compete in virtual spaces with a sense of realism and presence. Additionally, the integration of AI, VR, and AR will make gaming more accessible to diverse audiences, including those with disabilities, and will drive economic growth by opening up new markets and opportunities for developers. As these technologies continue to evolve, they will undoubtedly shape the future of gaming, making it more immersive, interactive, and inclusive.

Vũ Thùy Vân Trinh
Marketing Lead at [Gamee Studio](#)

Industry Insights



Hyper Casual games are in decline, with many publishers moving away from this genre. However, some studios are still finding niches to thrive in. Traditional Casual games, especially in the Puzzle category, offer more stability and sustainability but require higher quality and depth. Hybrid Casual games are a major target for many studios, but success is rare and demands significant investment in time, money, and talent. Studios need to accumulate experience to excel in this genre.

The game industry faces major challenges, including maintaining innovation amid fierce competition and the difficulty of creating standout games. Studios experienced in Hyper Casual games struggle with redefining their core product lines. Additionally, managing costs and securing funding is a significant challenge, especially for small and indie studios.

Trịnh Xuân Hải
Head Of Partnership at [GameGeek](#)

Industry Insights



The Mini Game segment has emerged as a major growth area within mobile gaming. Mini Games refer to instant games or HTML5 games that can be played without needing to download them first. In China, these types of games have succeeded via super apps such as WeChat and Douyin, which are the leading platforms. They traditionally monetize through an ads only model and do not require a license (ISBN) to operate.

Nearly every mobile gamer surveyed reported that they had played a mini game in the past three months, which indicates the total number of mini game players on mobile is around 650 million in 2024. According to our survey 2/3 of mobile gamers are playing mini games daily or several times a week.

While in-app advertising (IAA) remains the primary monetization method for mini games, we have seen a sharp rise in hit IAP games (which do require ISBN). Tencent launched its casual-competitive party game called Dream Stars on mini game platforms, in addition to traditional app stores. Century Games launched their core strategy game Whiteout Survival on mini game platforms before traditional app stores.

Xiaofeng Zeng
VP at [Niko Partners](#)

Industry Insights



Growing demand from Brands to engage mobile games audiences will have a major impact on both UA and Ad Monetization. As demand surges publishers will have a real choice between featuring ads for competitors or major consumer brands. The implications for user acquisition will be huge, but it's the existing major publishers who will benefit whilst smaller companies face new barriers to entry.

John Speakman
CEO at [Gamesforum](#)



At Appvertiser, we've introduced a sophisticated predictive modeling tool that showcases 95% accuracy in predicting Lifetime Values (LTVs) across various app genres, including gaming, non-gaming, subscription, and ad-monetized apps. This tool enables precise LTV forecasting, ensuring profitability and meeting ROI targets. With these accurate predictions, it's possible to scale user acquisition (UA) campaigns profitably, allowing for confident spending decisions. The predictive modeling extends beyond the app level, providing detailed insights at creative, campaign, channel, and country levels. This level of granularity helps unlock additional value that wasn't achievable before, whether independently or with other solutions. By leveraging this advanced tool, informed decisions can be made that drive success and growth, optimizing campaigns to achieve business goals effectively.

Harut Amirkhanyan
Director of Growth Marketing at [Appvertiser](#)

Industry Insights



The top strategy for user acquisition I'd highlight is serving the audience best by staying up to date with market research, being innovative with creatives, and combining these two with iterative testing.

Market Research: Research is best used for navigating efforts. Understanding trends and identifying points of differentiation in both paid UA and app store, as well as learning the traits and motivators of the target audience. This provides a foundation for planning successful creatives.

Innovative Creatives: Following audience and market knowledge, the creativity and uniqueness of content and design can help greatly in standing out in a competitive market.

Iterative Testing: Choices can have a large impact, and A/B testing the creatives allows for continuous experimentation, learning, and optimization of creative strategies. Testing UA creatives and product page contents (ASO) provides the best chances of reaching performance goals.

Senni Nurmi
Head of Marketing at [Geeklab](#)

Industry Insights

UGC NINJA

First of all 2024 has been marked with a huge boost of AI avatars, e.g. Arcades got so much hype this spring. I was really surprised at how fast the technology evolved. I can see a variety of options offered now from simple AI lip-sync to complex 3d models.

Just saw a new Chinese AI for Creatives | Hooks production <https://klingai.com> , and yeah for now you can only use the free version with limited tokens, but I bet it will take no time for us all to be using it in full range.

What to tell if even TikTok has already added the badge of “AI content” that means the market really feels it.

Another two evolving trends I would like to mention: 1) merging UGC style ads with Playables; 2) using UGC style ads not only on social media platforms, but on such as Unity, Mintegral, AdMob. Right to say they were used there before by major players like Dream Games as an example, but now we can see other companies are getting positive ROI.

Ross Puriasev
CMO at UGC Ninja

According to all the interviews I conducted during the gaming industry events featured in my vlog, I see a lot of people talking about money issues. Currently, we notice many layoffs and budget cuts, yet these are all temporary actions. I believe we are in a period of adaptation and transformation.

It is all about taking action and responding to market needs. Hyper-casual games are transforming into hybrids, and cheap installs are not cutting it anymore. Now, companies are focusing on acquiring higher-quality users with longer LTV. All the changes are for good, cause once you face the challenge you cut the BS.

Renata Ravilova
PR&Community at [UGC Ninja](#)

The gaming industry is on the cusp of significant transformation, driven by key trends that will reshape its landscape. Central to this change is the rise of Artificial Intelligence (AI) in game development, which will streamline production and lower entry barriers, allowing smaller teams to create high-quality games. This will lead to a surge in game releases, intensifying market competition.

To stand out, developers must focus on unique gameplay, compelling narratives, and effective marketing strategies. Cross-platform play will also be crucial, offering seamless gaming experiences across devices. Additionally, integrated webshops and mini-games are gaining popularity, enhancing player engagement and providing new monetization avenues.

Evolving app store regulations and a rise in mergers and acquisitions (M&A) will further shape the industry. Compliance with stricter app store guidelines and strategic consolidation by larger companies will drive innovation and investment, positioning them to thrive in a rapidly evolving market.

In summary, the gaming industry's future is dynamic and competitive, with AI, unique game features, cross-platform play, and regulatory changes set to redefine the landscape.

Batuhan Avucan
Founder & Managing Director at [**Mobidictum**](#)

01

H1 2024 Insights into the Trends in Global Mobile Games

Overall Advertising Trends in Global Mobile Games

There was a robust growth in the number of advertisers. Creatives per advertiser remained stable at around 100 per month.

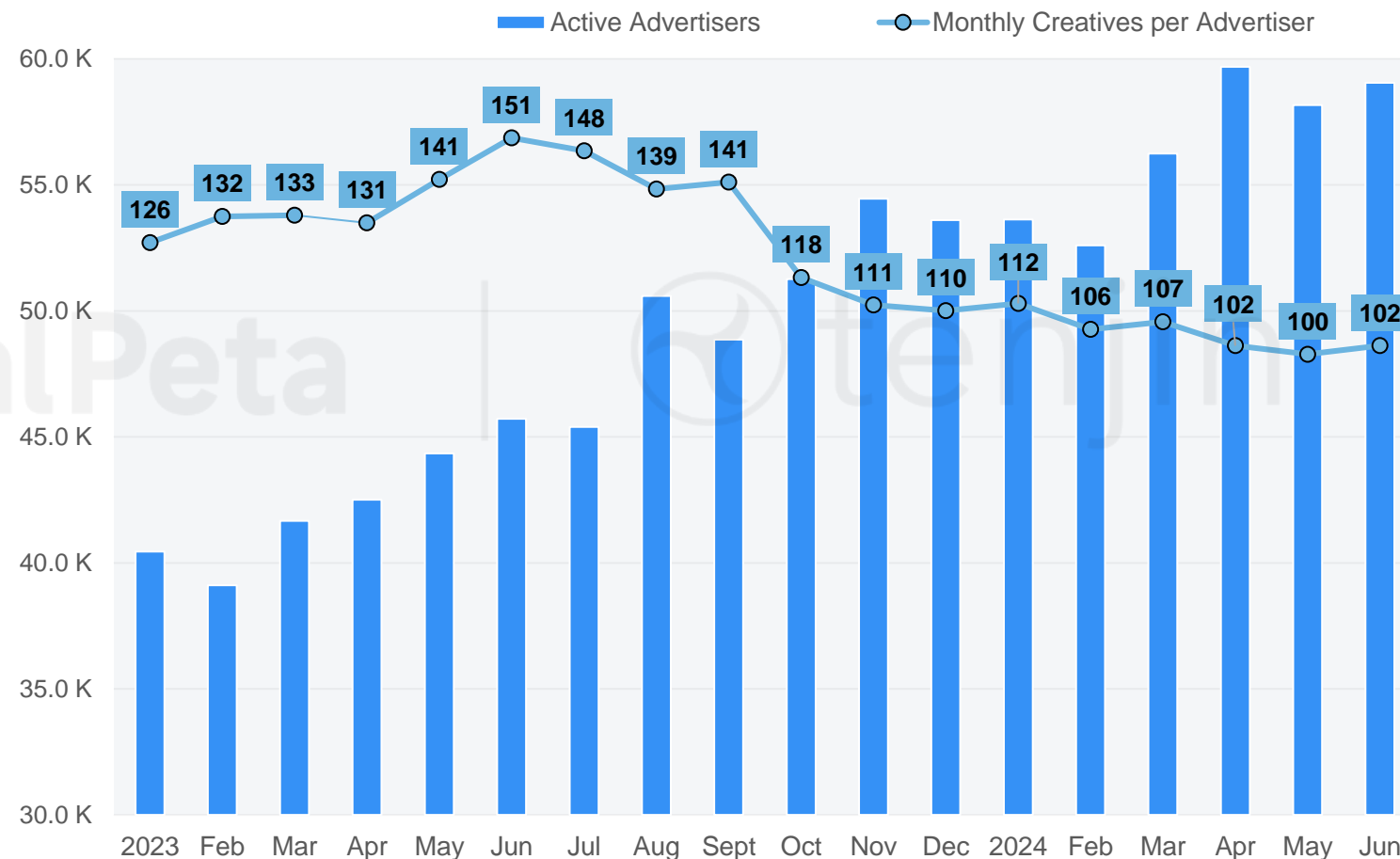
- The number of active advertisers was on a stable rise in Q2 2024, with over 55K mobile game advertisers every month, and the highest number in April.
- In H1 2024, there were about 105 monthly creatives per advertiser, indicating a less competitive market compared to last year. Monthly creatives declined by 22.8% YoY and 18.0% MoM.

H1 2024 Monthly Active Advertisers

56.6 K YoY 33.7%↑

H1 2024 Monthly Creatives per Advertiser

105 YoY 22.8%↓



Marketing Analysis of New Creatives for Global Mobile Games

The advertising of mobile games experienced a decline. Monthly advertisers with new creatives accounted for a smaller percentage. New creatives accounted for over 50% every month in 2024.

- In H1 2024, advertisers with new creatives accounted for an average of 65.1% per month, down 5.8% YoY, and the percentage peaked at 66% in June this year.
- There was a rise in the share of new creatives. In 2024, monthly new creatives accounted for 51.4%, up 2.4% YoY, and peaked at 56% in June, basically unchanged compared to the same period last year.

65.1%

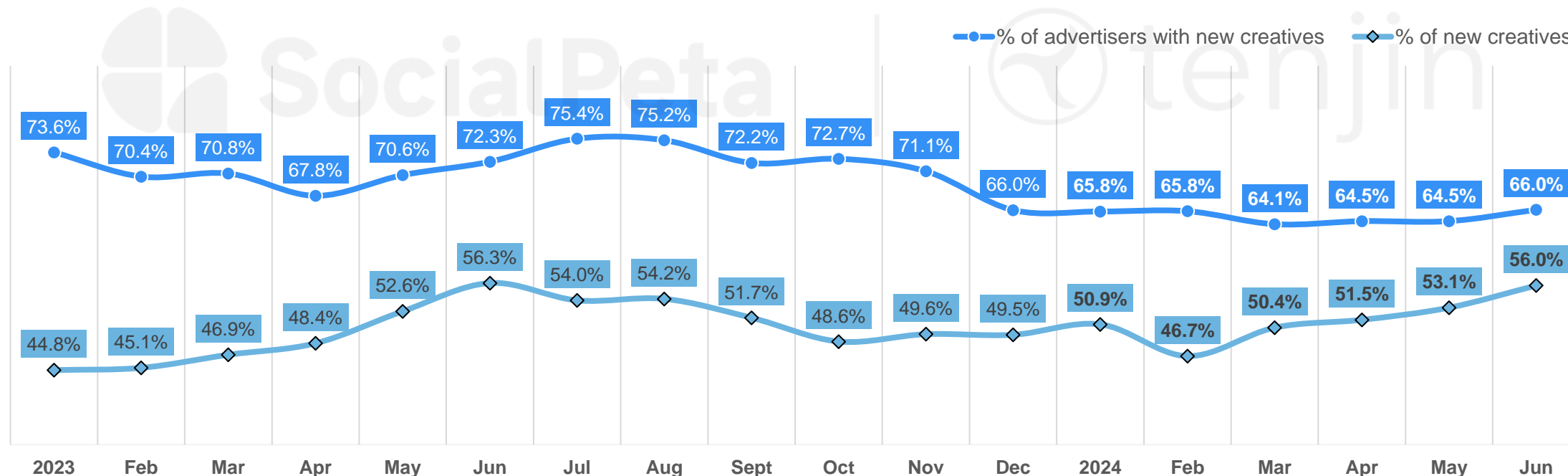
YoY : 5.8%↓

Advertisers with new creatives in H1

51.4%

YoY : 2.4%↑

Share of monthly new creatives in H1



Insights into Global Mobile Game Advertising in Top Regions

HK, Macau and Taiwan were the most competitive regions in H1 2024. Western Europe reported over 31K monthly advertisers.

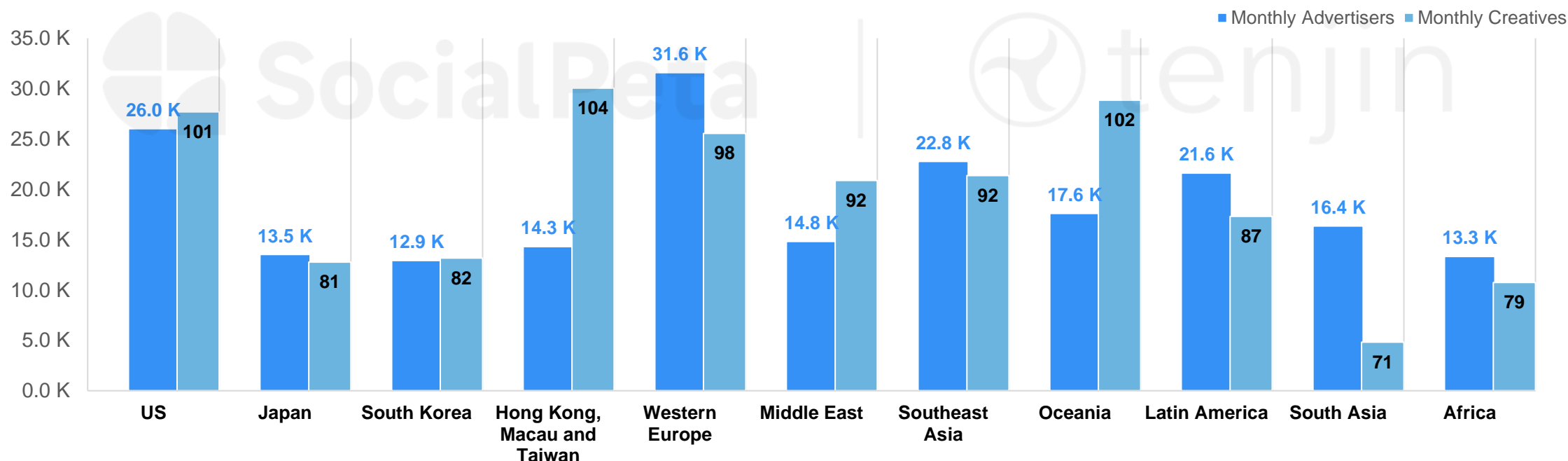
- There were over 100 monthly creatives in Hong Kong, Macau and Taiwan, Oceania, and the US;
- Besides Western Europe, the US, Latin America, and Southeast Asia all had over 20K monthly advertisers.

Monthly advertisers: 31.6K in Western Europe

Western Europe reported the highest monthly game advertisers, and it was also the only region that had over 30K advertisers. Southeast Asia and Latin America both had over 20K advertisers.

Highest monthly creatives: 104 in HK, Macau and Taiwan

Hong Kong, Macau and Taiwan regions of China experienced the fiercest competition in terms of advertising, followed by Oceania and the US. Advertising in Southeast Asia was less competitive, with 92 monthly creatives.



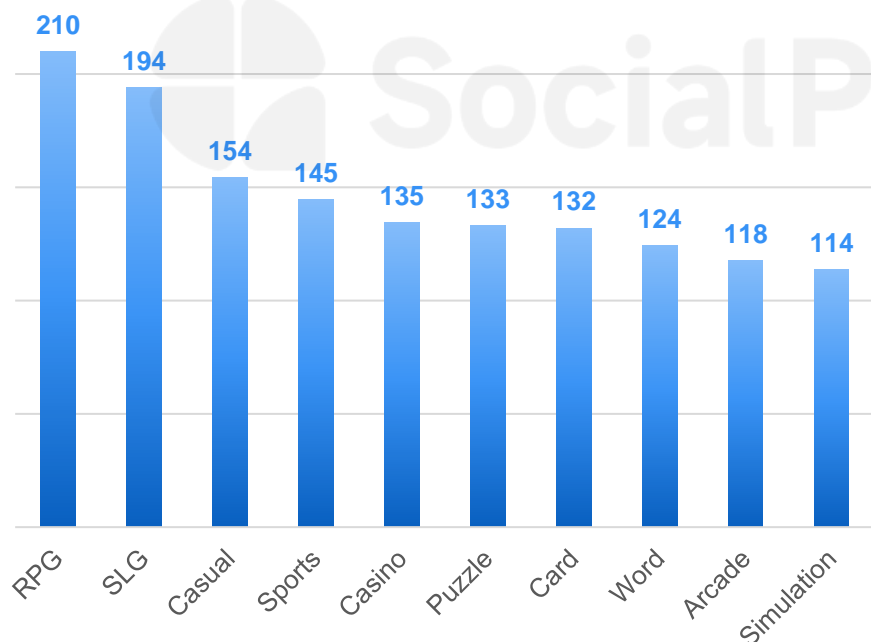


Advertising Analysis of Global Mobile Games by Genre

RPGs replaced SLGs as the game genre with the most creatives in H1, and puzzle games contributed the biggest YoY growth.

- Casual games still contributed the highest percentages of advertisers and creatives, but the percentage of advertisers experienced a drop of 1.84%, the biggest drop among all game genres.
- Casino mobile games had the biggest drop in the percentage of creatives, followed by card games.

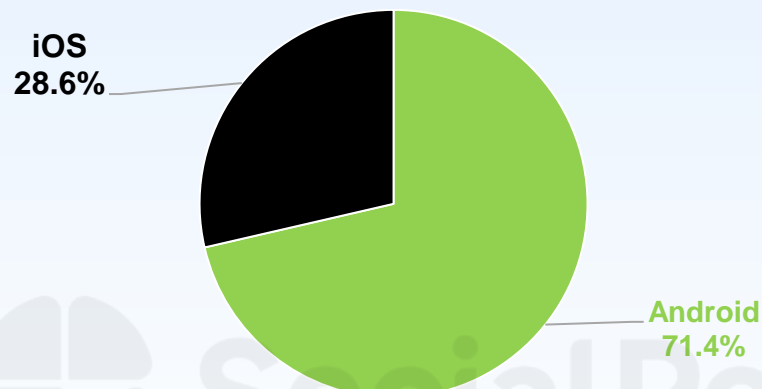
Monthly Creatives of Top Game Genres



Genre	% of Advertisers	YoY Change	Genre	% of Creatives	YoY Change
Casual	28.59%	-1.84%	Casual	32.43%	0.11%
Puzzle	13.87%	2.34%	Puzzle	12.14%	1.44%
SIM	9.32%	0.02%	RPG	11.64%	0.91%
Action	7.32%	-0.39%	SIM	7.86%	0.36%
RPG	6.42%	0.67%	SLG	7.00%	0.07%
Casino	6.03%	-0.28%	Action	6.17%	0.92%
SLG	4.80%	0.67%	Casino	4.47%	-2.60%
Adventure	3.92%	-0.04%	Card	3.69%	-1.48%
Arcade	3.51%	-1.51%	Adventure	3.36%	0.31%
Card	3.48%	-0.68%	Arcade	3.00%	-0.15%

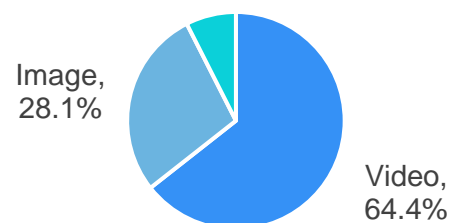
Marketing Analysis of Global Mobile Games on iOS and Android

iOS advertisers accounted for less than 30%, among which casual and casino games contributed the lowest percentages. Video creatives on Android accounted for a higher percentage and were updated more frequently.



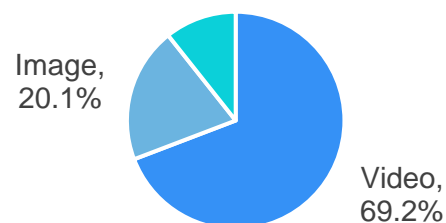
iOS Advertisers

Monthly advertisers: **14.5K**
Share of monthly new creatives: **46.8%**



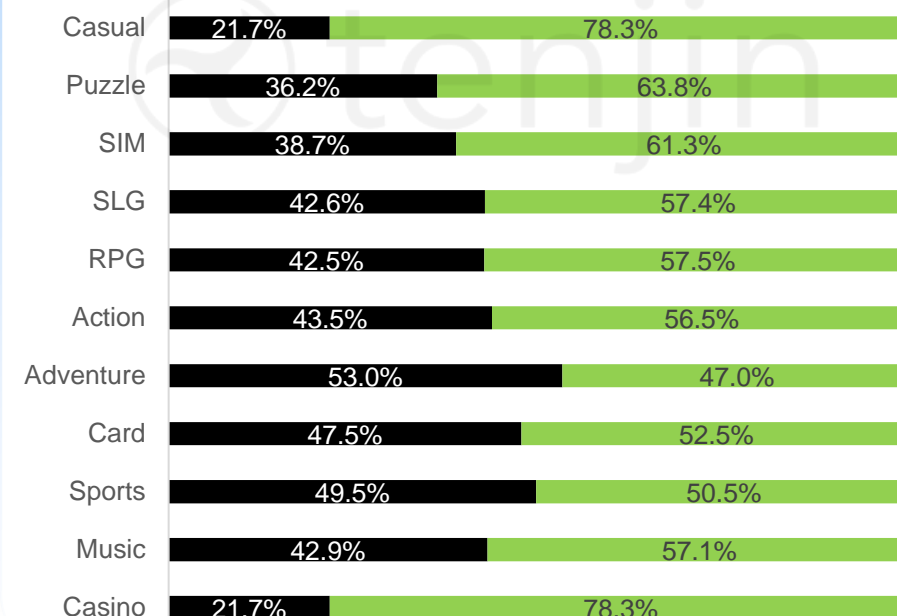
Android Advertisers

Monthly advertisers: **29.0K**
Share of monthly new creatives: **50.9%**



Percentages of Top Game Advertisers by Genre on iOS and Android

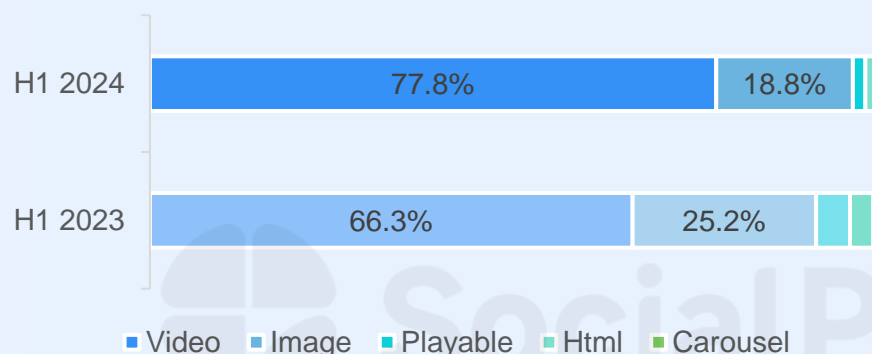
- On iOS, casual and casino game advertisers accounted for 21.7%, the lowest percentage.
- Hard-core games accounted for a higher percentage of advertisers on iOS, among which adventure advertisers on iOS accounted for over 50%.



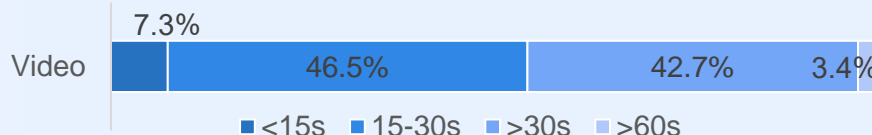
Advertising Analysis of Global Ad Creatives by Type

Video creatives accounted for over 3/4 of all creatives for mobile games and over 46% of the video creatives were of more than 30 seconds. Thanks to AI, image creatives had a rising number of impressions.

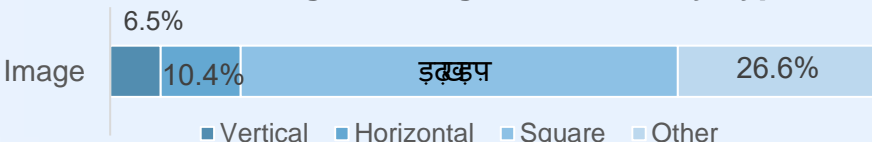
Percentage of Creatives by Type



Percentage of Video Creatives by Length

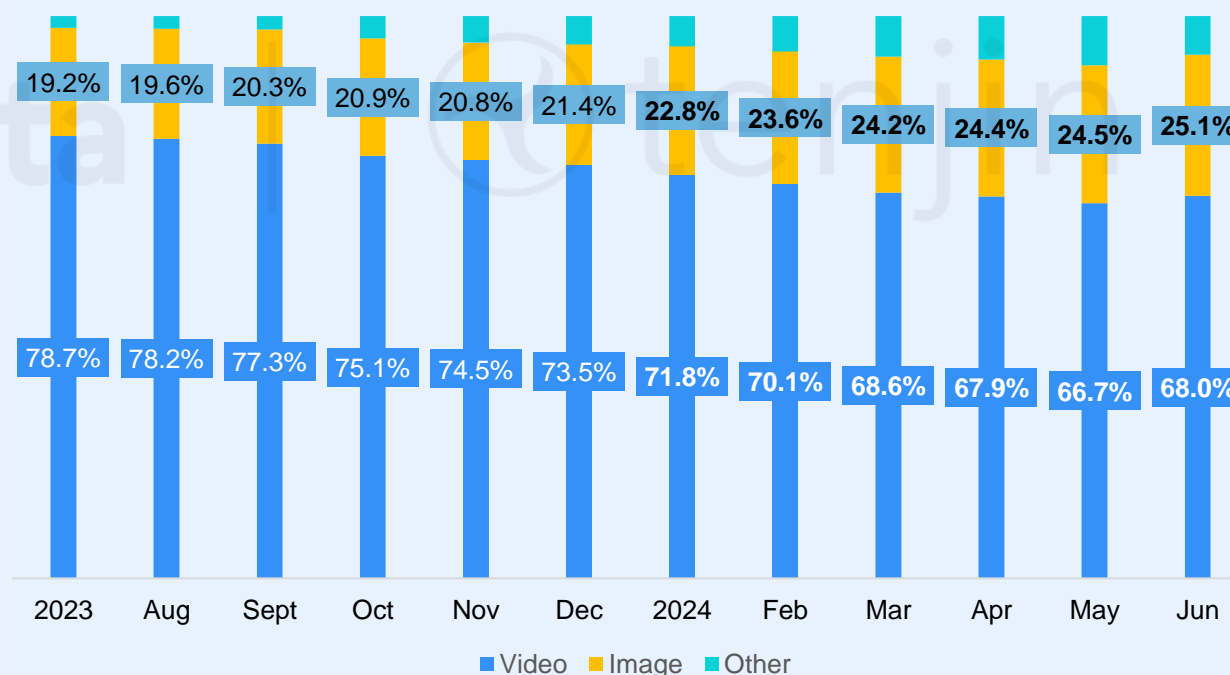


Percentage of Image Creatives by Type



- ✓ In H1 2024, video creatives accounted for over 77%, up 11.5% compared to the same period last year.
- ✓ Under the influence of AIGC, impressions of image creatives continued to increase and accounted for over 25% in June this year.































Percentages of impressions of ad creatives by type

































02

Top Global Mobile Games in H1 2024

Top 30 by Advertising - Android







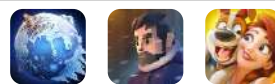









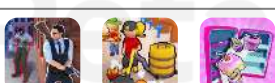





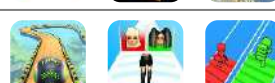

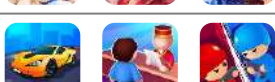



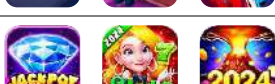








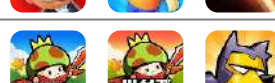
1	 Jewel Abyss ENP Games	Match-3	11	 Cash Tornado™ Slots Zeroo Gravity Games	Slots	21	 1945 Air Force ONESOFT	Arcade
2	 Tycoon Casino Vegas Slot Games Triwin Games	Slot	12	 Mafia City Yotta Games	SLG	22	 LYSSA: Goddess of LOVE Panoramik Games	Card RPG
3	 Block Blast! Hungry Studio	Matching	13	 Twisted Tangle Rollic Games	Hyper-Casual	23	 Nexus War: Civilization Yotta Games	SLG
4	 The Grand Mafia Yotta Games	SLG	14	 Seat Away Rollic Games	Hyper-Casual	24	 Sky Utopia JunHai Games	Idle RPG
5	 MONOPOLY GO! Scopely	Social Casino	15	 Doomsday IGG	SLG	25	 Ancient Seal: The Exorcist Xsuper Gamer	MMO RPG
6	 Lords Mobile IGG	SLG	16	 Garden Affairs Judian Technology	Match-3	26	 Fishing Game Zone HOMELAND INTERACTIVE T&E PTE. LTD.	Fishing
7	 Lightning Link Casino Slots Product Madness	Slots	17	 Word Search Block Puzzle Game Pandas of Caribbean	Word	27	 Happy Match Cafe™ KINGS FORTUNE	Matching
8	 マジックカード Bingchuan Network	Card RPG	18	 Doodle Magic Dream Of Dragon	Minigame	28	 Jackpot World™ Bole Games	Slots
9	 Titan War Bingchuan Network	Card RPG	19	 Legend of Mushroom 4399	Minigame	29	 Dragonscapes Adventure Century Games	Business Simulation
10	 Braindom Matchingham Games	Brain Teaser Hyper-Casual	20	 Whiteout Survival Century Games	SLG	30	 Build Master: Bridge Race First Fun	Building Simulation

Top 30 by Advertising - iOS

1	 MONOPOLY GO! Scopely	Social Casino	11	 出發吧麥芬 XD Inc.	Idle RPG	21	 Hero Wars Nexters	Card RPG
2	 Legend of Mushroom 4399	Minigame	12	 潘朵拉：命運先知 SpringGame	MMO RPG	22	 Okara Escape Jets group	Merge-2
3	 マジックカード Bingchuan Network	Card RPG	13	 Traffic Puzzle Huuuge Games	Matching	23	 Brain Teaser Guru 游梦科技	Brain teaser Hyper-casual
4	 Block Puzzle Doodle Mobile	Matching	14	 My Cruise EYEWIND	Business Simulation	24	 Evony Top Games	SLG
5	 Ancient Seal: The Exorcist Xsuper Gamer	MMO RPG	15	 Last War: Survival First Fun	SLG	25	 Cash Club Casino Bole Games	Slots
6	 Block Blast! Hungry Studio	Matching	16	 BangBang Survivor SPGame	Minigame	26	 Adventure Island Merge FlyBird	Merge-2
7	 Dragonscapes Adventure Century Games	Business Simulation	17	 미르2: 승자위왕 KODA DUCK GAMES	MMO RPG	27	 The Grand Mafia Yotta Games	SLG
8	 異世界奇妙生活 EWORLD	RPG SIM	18	 Happy Match Cafe™ KINGS FORTUNE	Matching	28	 Legend of Mushroom: Rush 4399	Minigame
9	 Whiteout Survival Century Games	SLG	19	 Rent Please! Landlord Sim Shimmer Games	Business Simulation	29	 少年神獸傳 Rhinos	Idle Card
10	 了不起的AI修仙 UNI-STAR	Idle RPG	20	 新武俠大明星 喬藏數位	Card RPG	30	 Tarisland Tencent Games	MMO RPG



Top 20 Companies by Advertising

#	Company Name		NO. of Advertised Products	Mainly Advertised Products	#	Company Name		NO. of Advertised Products	Mainly Advertised Products
1	Rollic Games		242		11	Guru Puzzle Game		29	
2	Bingchuan Network		34		12	Century Games		25	
3	Yotta Games		16		13	Hungry Studio		8	
4	FunPlus		31		14	Product Madness		10	
5	Homa		70		15	VOODOO		224	
6	JunHai Games		48		16	Supersonic		120	
7	SayGames		127		17	Aged Studio		48	
8	Bole Games		25		18	Casual Azur Games		228	
9	IGG		31		19	Scopely		30	
10	Level Infinite (Tencent)		42		20	Joy Net Games (4399)		18	

03

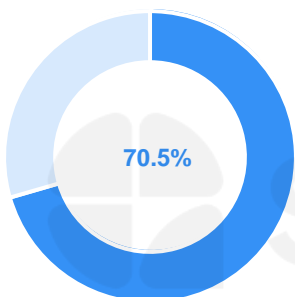
H1 2024 Marketing Insights into Global Mobile Games in Top Regions

Advertising Insights into the US Market

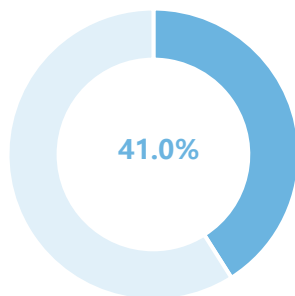
H1 2024 recorded totally over 50K advertisers with new creatives. Casual puzzle games contributed half of the ad creatives released for games in the US.

- Rollic Games' several hyper-casual games made it to the list of top games by advertising in the US, with most of the creatives to be gameplay + minorly adjusted artworks.

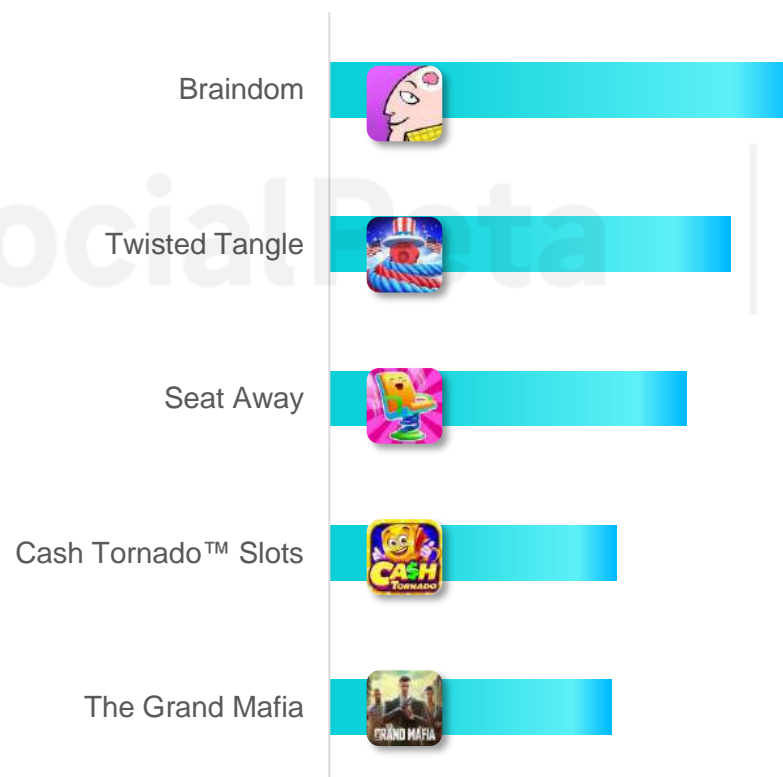
Monthly proportion of advertisers with new creatives



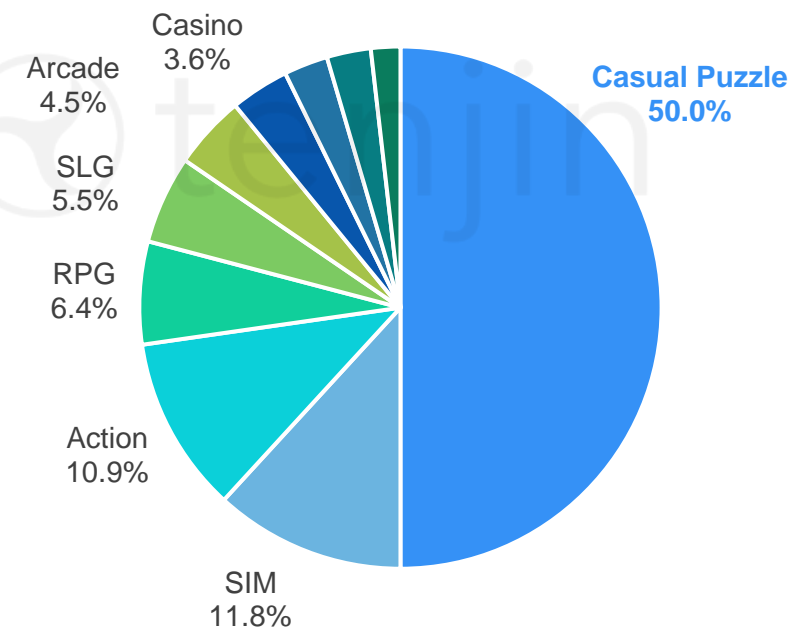
Monthly proportion of new creatives



H1 2024 Top 5 games by advertising in the US



Percentages of new advertisers by genre in H1

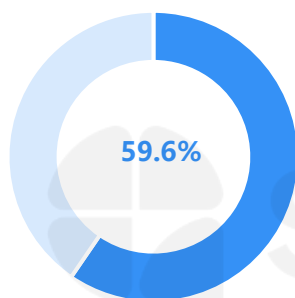


Advertising Insights into the Japanese Market

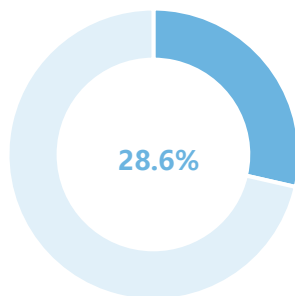
Japan contributed the lowest percentage of new creatives to the global market. The traditional games' PV and CM were very effective in generating impressions.

- Japan was the No.1 target market for minigames going global. On the top 5 list, 3 games are from Chinese companies.

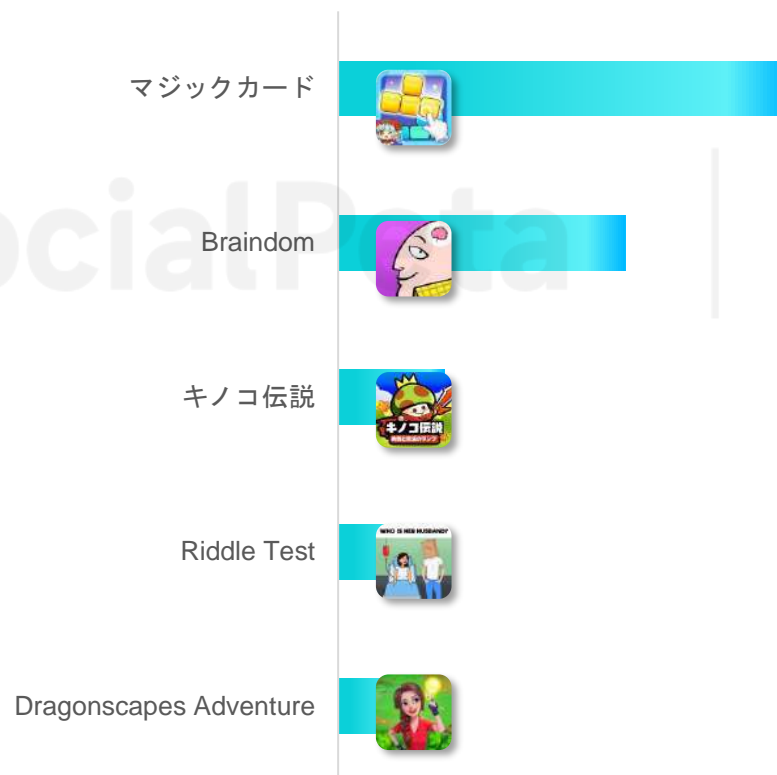
Monthly proportion of advertisers with new creatives



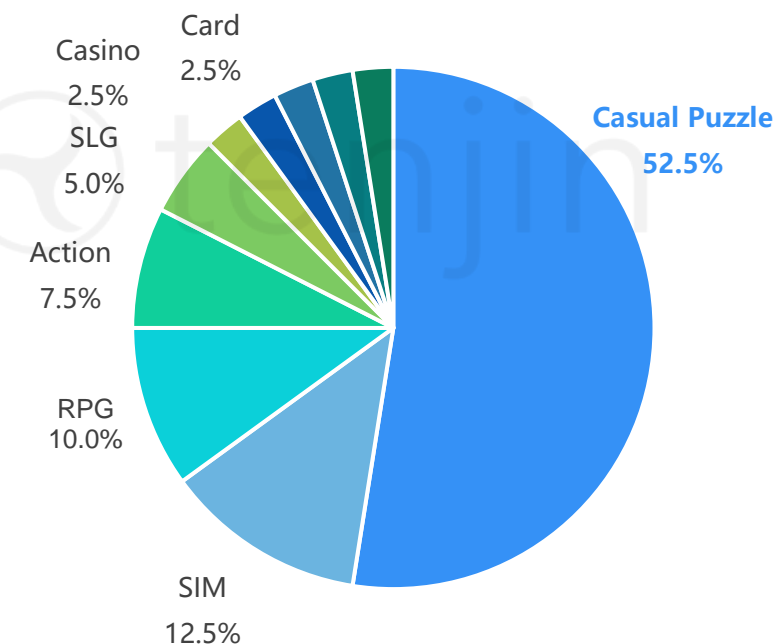
Monthly proportion of new creatives



H1 2024 Top 5 games by advertising in Japan



Percentages of new advertisers by genre in H1

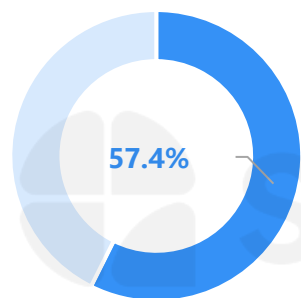


Advertising Insights into the South Korean Market

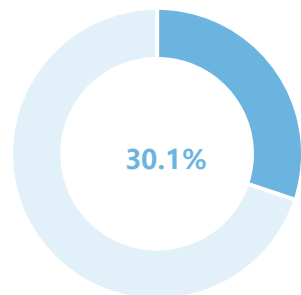
MMO games remained a dominant position in the South Korean market. In 2024, new SLG advertisers accounted for a considerable percentage of South Korea, indicating great potential.

- Many dark fantasy MMO games were newly released in South Korea. Anime-based games adapted from South Korean IPs achieved brilliant results.

Monthly proportion of advertisers with new creatives



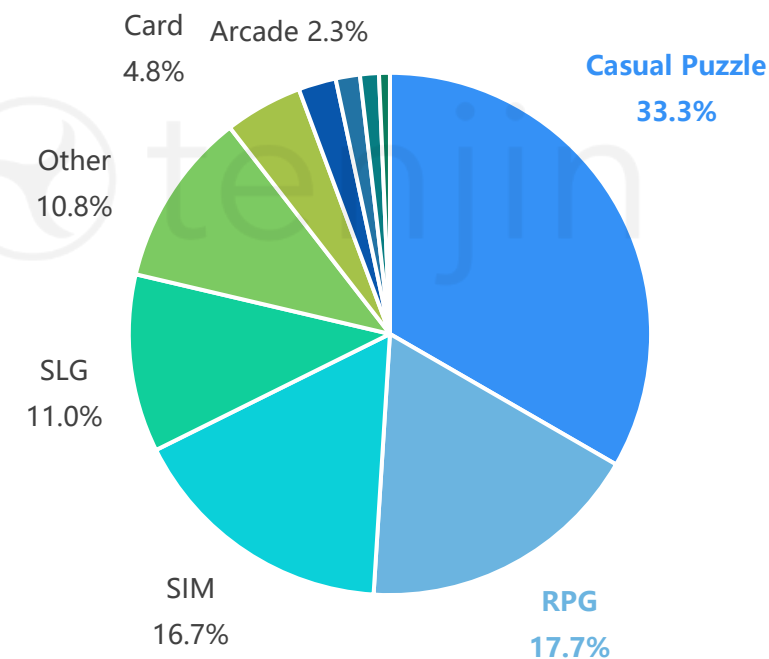
Monthly proportion of new creatives



H1 2024 Top 5 games by advertising in South Korea



Percentages of new advertisers by genre in H1

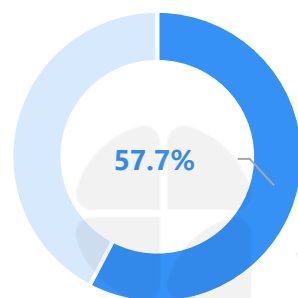


Advertising Insights into Hong Kong, Macau and Taiwan regions of China

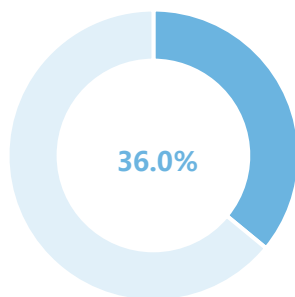
In the Hong Kong, Macau and Taiwan market, RPGs achieved outstanding performance, card games showed promising prospects, and Taiwan region had a higher opportunity index than Hong Kong and Macau.

- Wuxia and Xianxia games remained hot in the Hong Kong, Macau and Taiwan market.

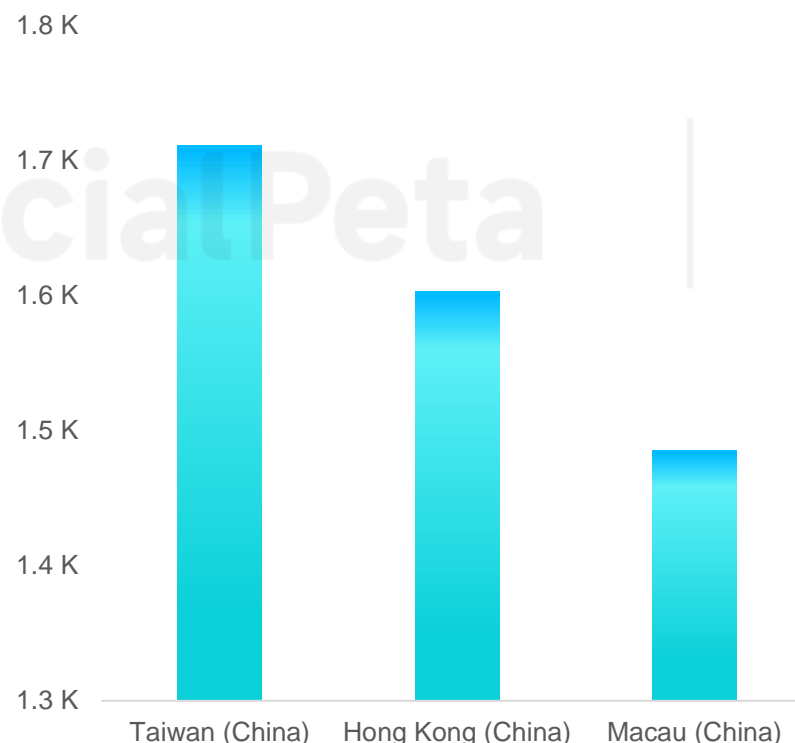
Monthly proportion of advertisers with new creatives



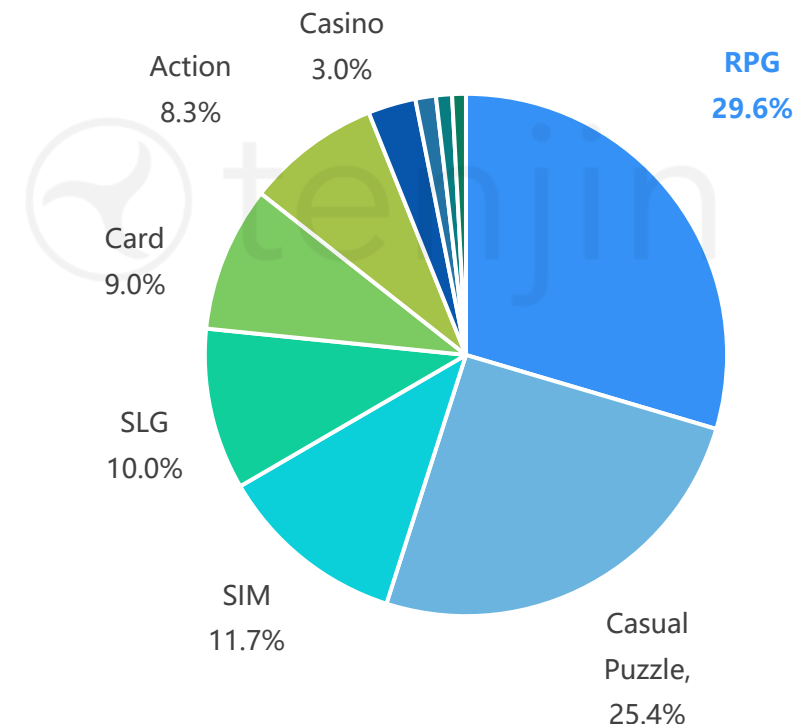
Monthly proportion of new creatives



Mobile game marketing opportunity index



Percentages of new advertisers by genre in H1

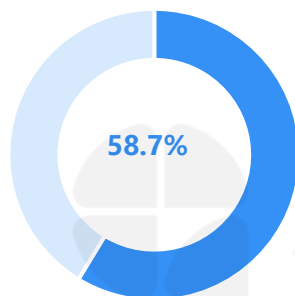


Advertising Insights into the Western European Market

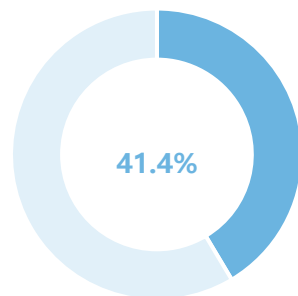
In Western Europe, new creatives accounted for over 41% of monthly creatives. Creatives were released in great numbers and new creatives were updated frequently.

- The UK Market outdistanced other regions in advertising. Cartoon-style SIM games ranked highly.

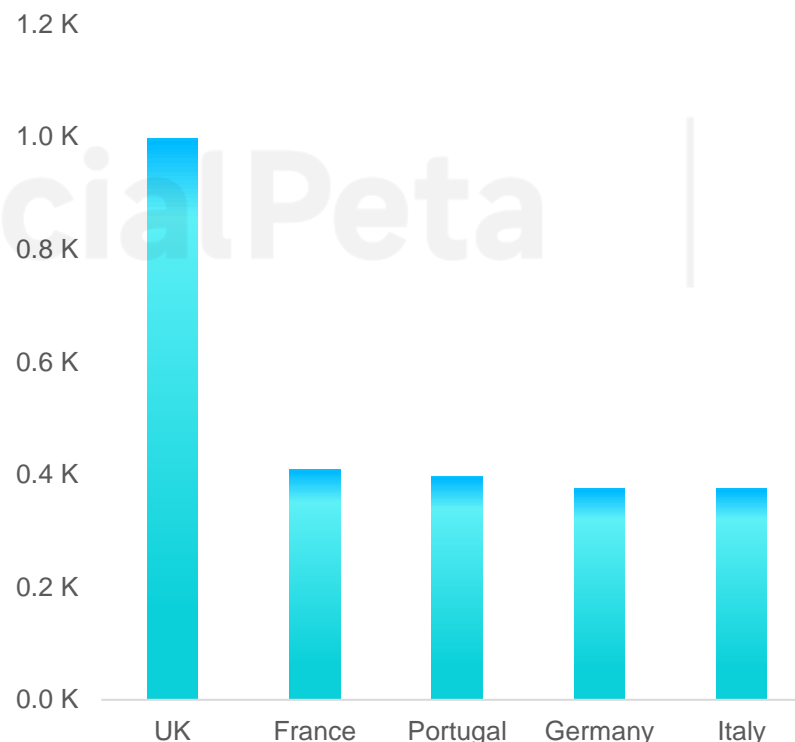
Monthly proportion of advertisers with new creatives



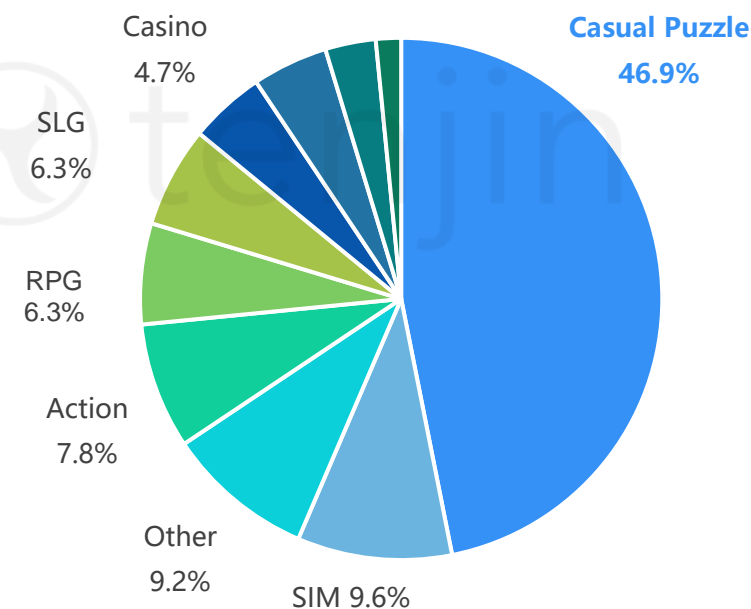
Monthly proportion of new creatives



Mobile game marketing opportunity index



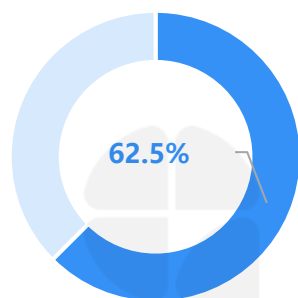
Percentages of new advertisers by genre in H1



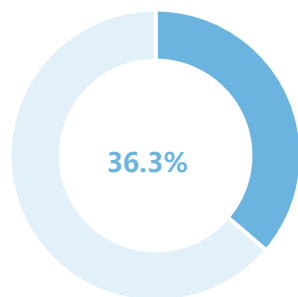
Advertising Insights into the Southeast Asian Market

In Southeast Asia, over 62% advertisers released new creatives every month, second only to the US market.

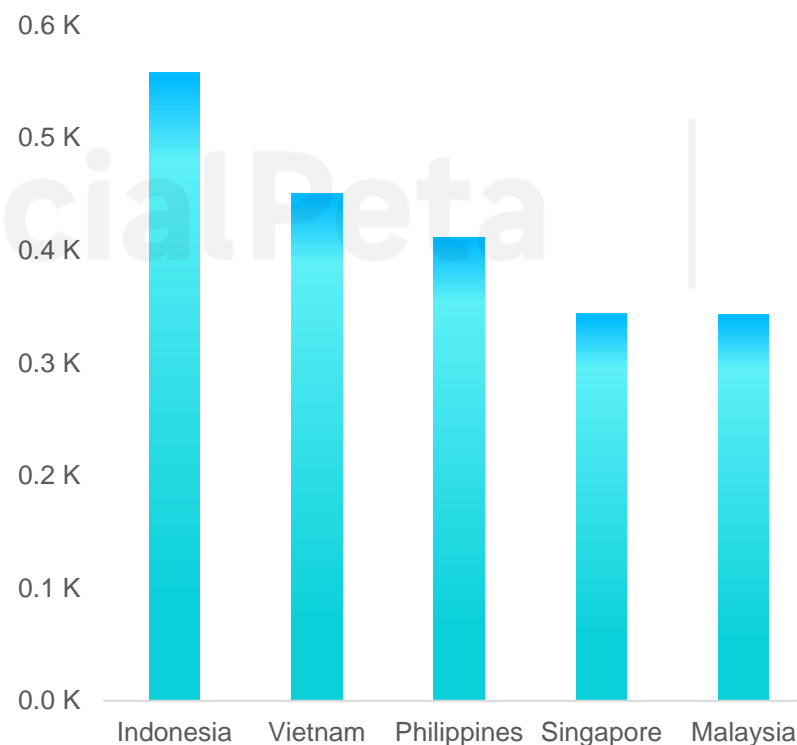
Monthly proportion of advertisers with new creatives



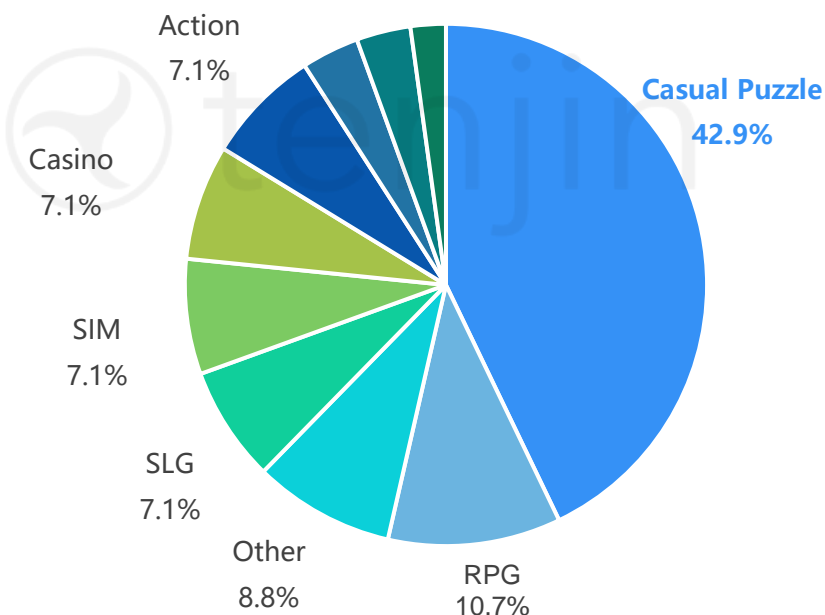
Monthly proportion of new creatives



Mobile game marketing opportunity index



Percentages of new advertisers by genre in H1

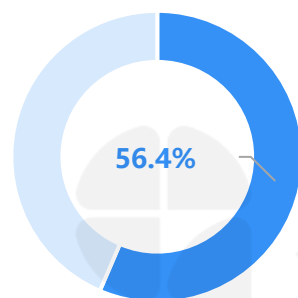


Advertising Insights into the Latin American Market

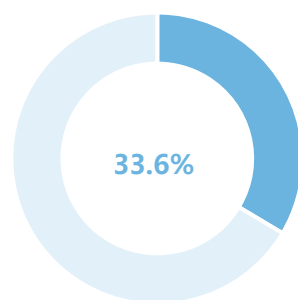
New Casual puzzle game advertisers accounted for nearly 55%, indicating that the local gamers preferred light games.

- In Latin America, the Brazilian market had the highest development value, and great advertising efforts were made by casino game advertisers.

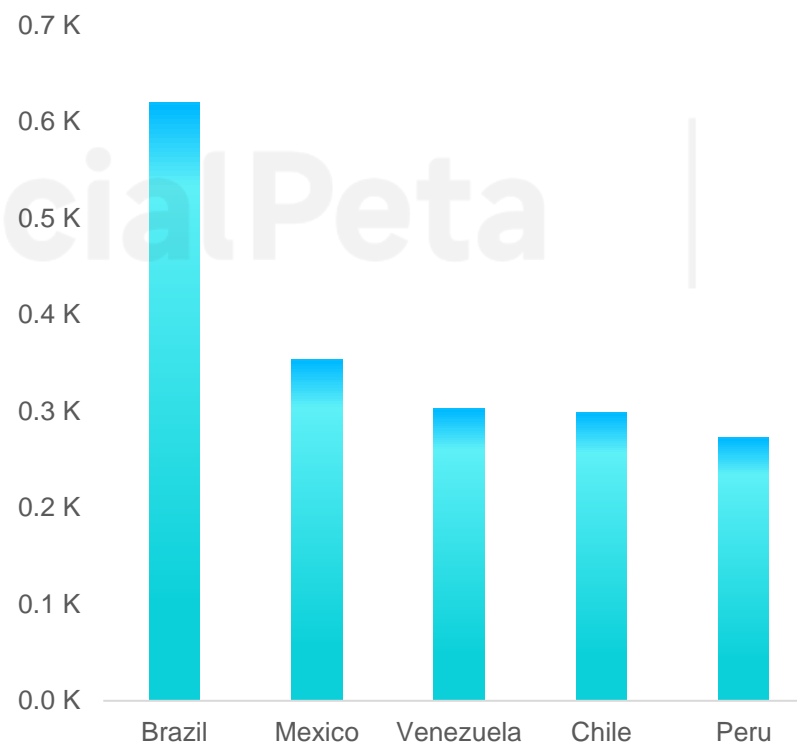
Monthly proportion of advertisers with new creatives



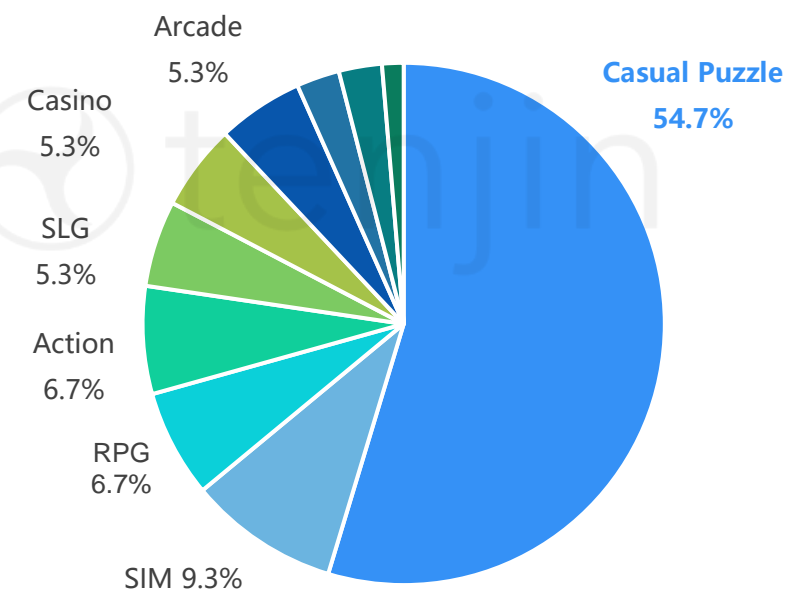
Monthly proportion of new creatives



Mobile game marketing opportunity index



Percentages of new advertisers by genre in H1

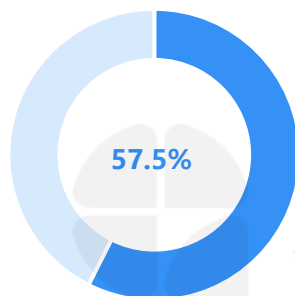


Advertising Insights into the Middle Eastern Market

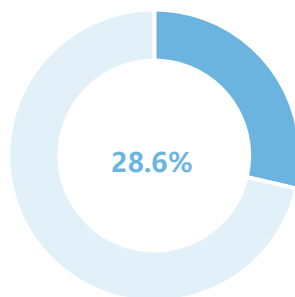
SIM and SLG genres accounted for relatively higher percentages of new advertisers. Middle East contributed a relatively lower percentage of new creatives to the global market.

- More game companies were targeting the markets of Saudi Arabia, UAE, and Morocco. Localization and social function were the key.

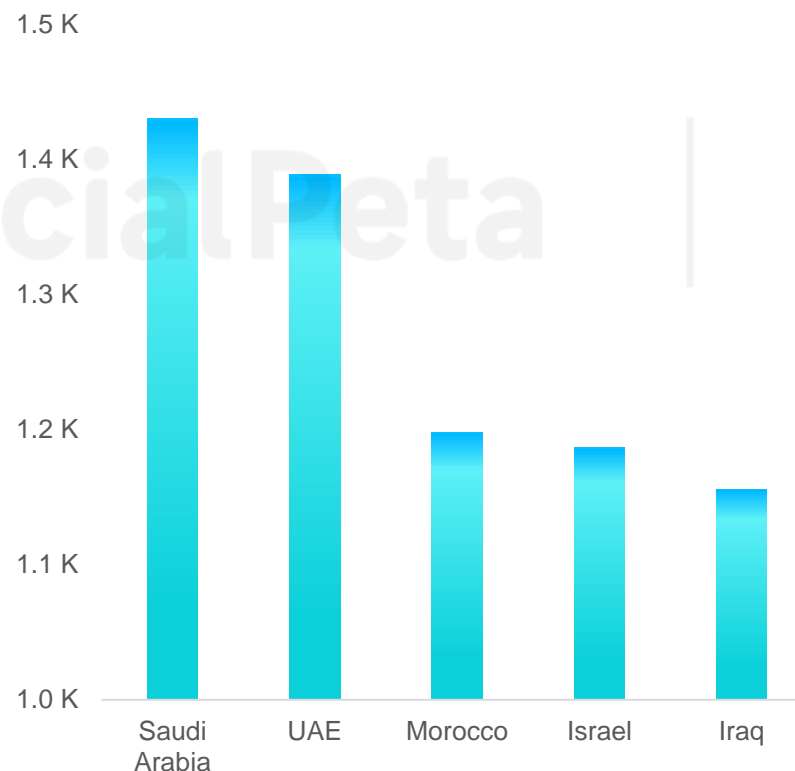
Monthly proportion of advertisers with new creatives



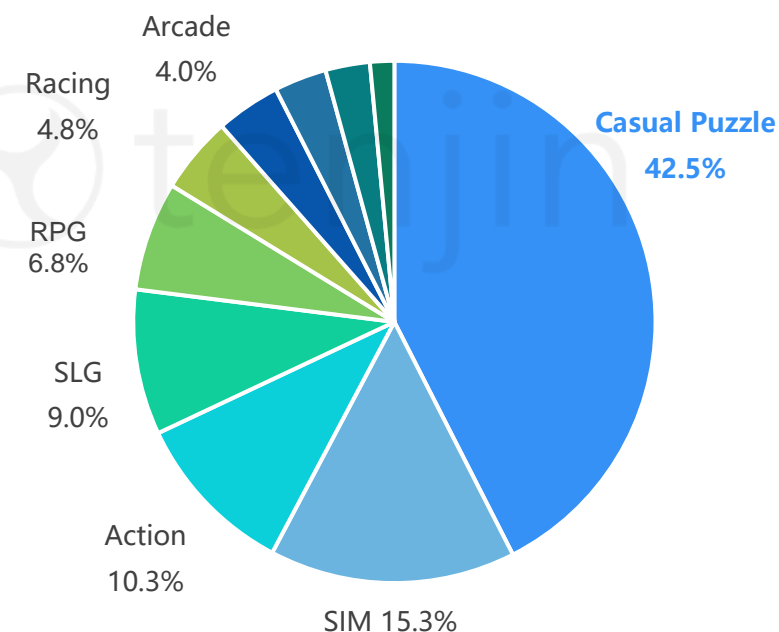
Monthly proportion of new creatives



Mobile game marketing opportunity index



Percentages of new advertisers by genre in H1



04

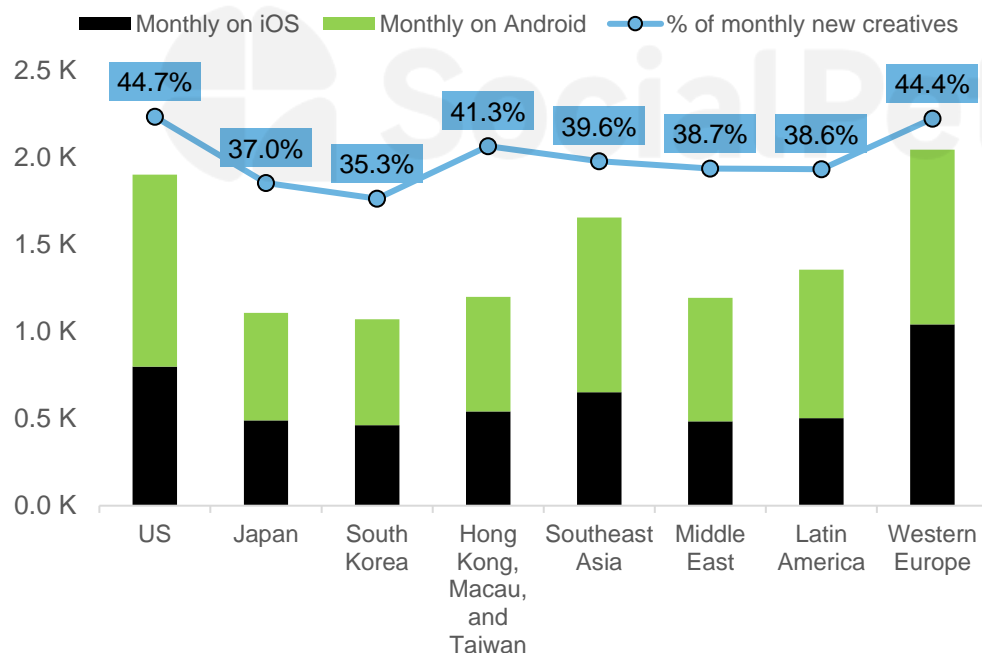
H1 2024 Marketing Analysis of Global Mobile Games in Popular Genres

Advertising of SLGs

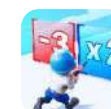
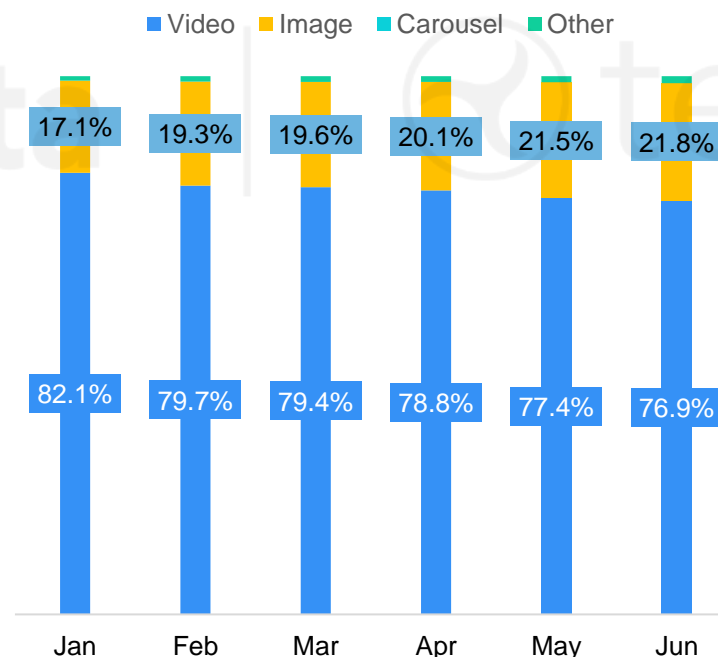
The percentages of SLG advertisers on iOS and Android were almost even. Video mini-game creatives remained the main method for advertising SLGs.

- Fierce competition remained. Due to the hidden rule of “high-quality + frequent updating”, SLGs contributed the highest percentage of new creatives among all genres.
- On the list of Top 100 SLGs by advertising, among which, high-quality SLGs made great advertising efforts.

The advertising of SLG advertisers in different regions in 2024



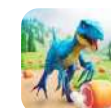
Percentages of impressions of ad creatives by type



Last War: Survival

First advertising date: Mar. 2023

Total Deduplicated Creatives: 22.1K



Primal Conquest

First advertising date: Aug. 2023

Total Deduplicated Creatives: 6.7K



鋼嵐

First advertising date: Mar. 2024

Total Deduplicated Creatives: 4.2K

Cases of Popular Creatives for SLGs

Mini-games featuring “number growth” remained the mainstream of creatives for SLGs. The creatives start with sexy elements and dramatic stories, eye-catching for the purpose of more conversions.

[Click to play the complete creative](#)



Number Fight for Level-up



Creative Bullet Shooting



Eye-catching Drama



Live-action Sitcom

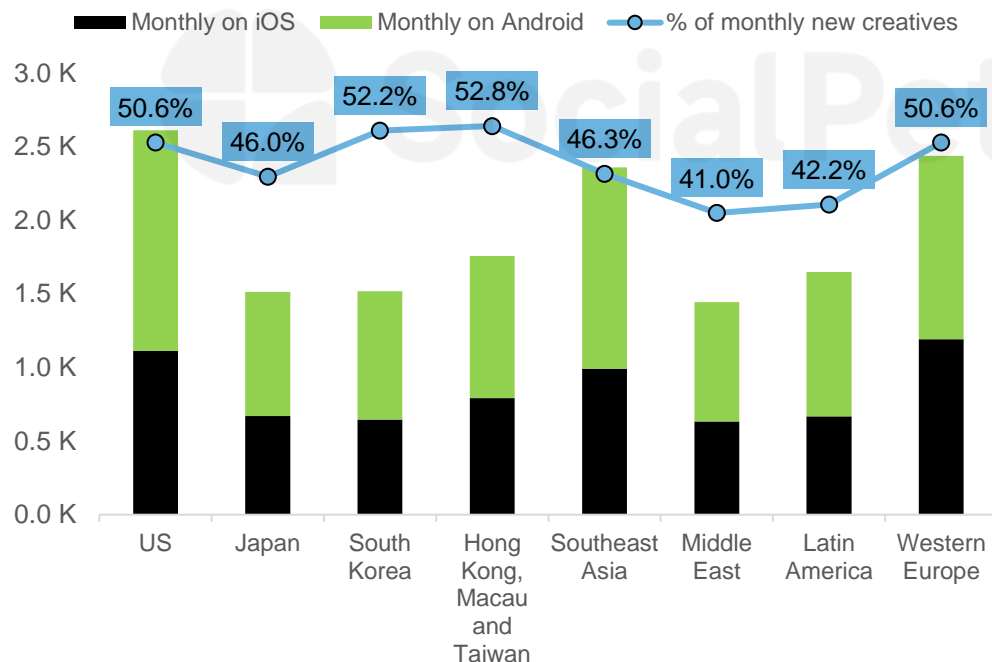
- Source: SocialPeta – Ad Creatives – Ad Display; the ad creatives that were selected and analyzed were relatively popular and had more impressions within the date range.
- Date Range: Jan - Jun 2024

Advertising of RPGs

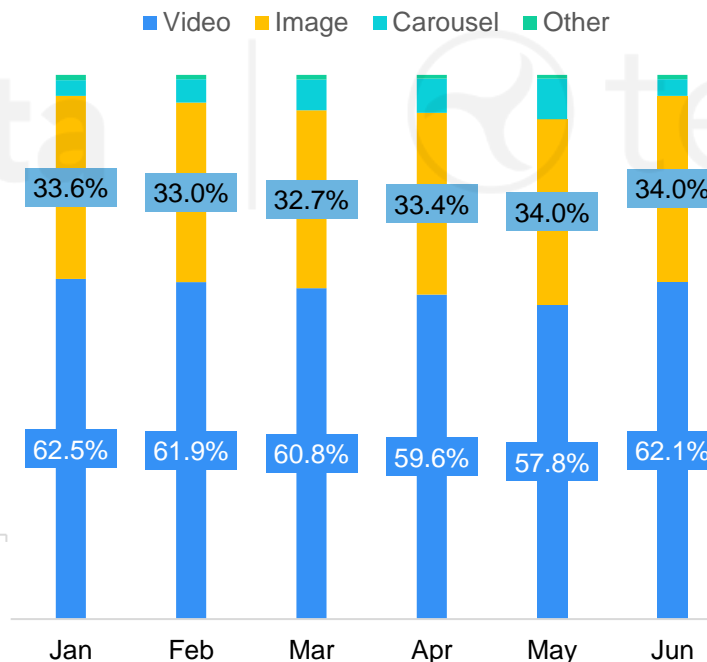
RPGs contributed the highest percentage of new creatives among all game genres. The mainstream in 2024 was made up of open world, minigames, and idle+.

- RPGs stood out with high percentages of image creatives and impressions of image creatives. With AI technology, image creatives were created at an amazing speed.
- The South Korean market and China's Hong Kong, Macau and Taiwan market contributed the highest percentages of RPG new creatives. RPGs were very popular among local people.

The Advertising of RPG advertisers in different regions in 2024



Percentages of impressions of ad creatives by type



Legend of Mushroom

First advertising date: Feb. 2024

Total Deduplicated Creatives: 27.2K



出發吧麥芬

First advertising date: Dec. 2023

Total Deduplicated Creatives: 15K



Wuthering Waves

First advertising date: Apr. 2023

Total Deduplicated Creatives: 8.7K

Cases of Popular Creatives for RPGs

AI creatives increased significantly. A collage of jokes and gameplay brought a high conversion rate.

[Click to play the complete creative](#)



Make jokes + Gameplay intro



AI-generated high-quality CG



Tribute to classic IPs



A close-up of a classic Bishōjo game character

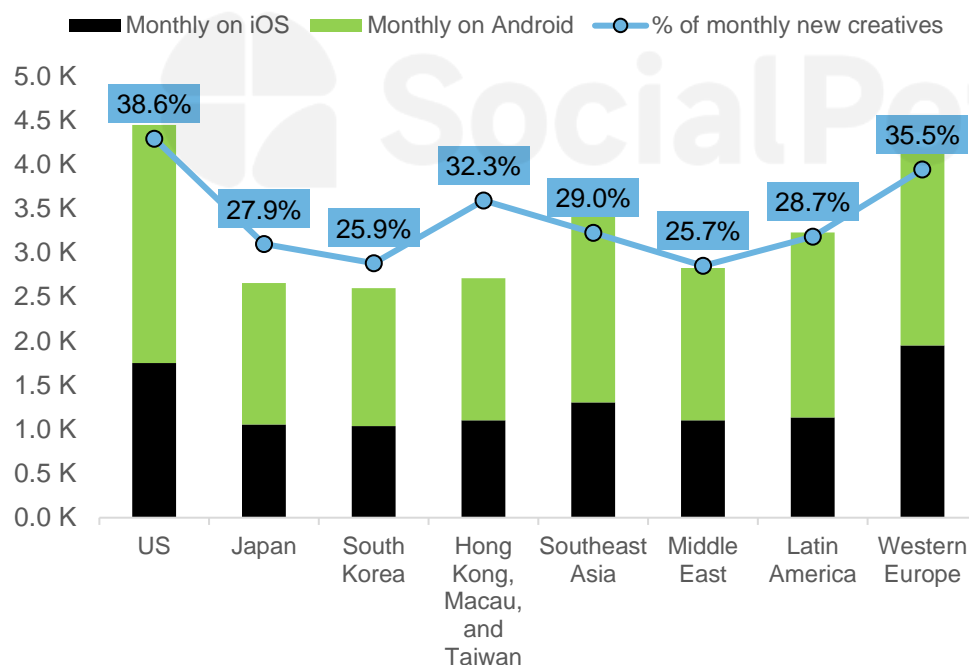
- Source: SocialPeta – Ad Creatives – Ad Display; the ad creatives that were selected and analyzed were relatively popular and had more impressions within the date range.
- Date Range: Jan - Jun 2024

Advertising of SIM Games

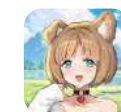
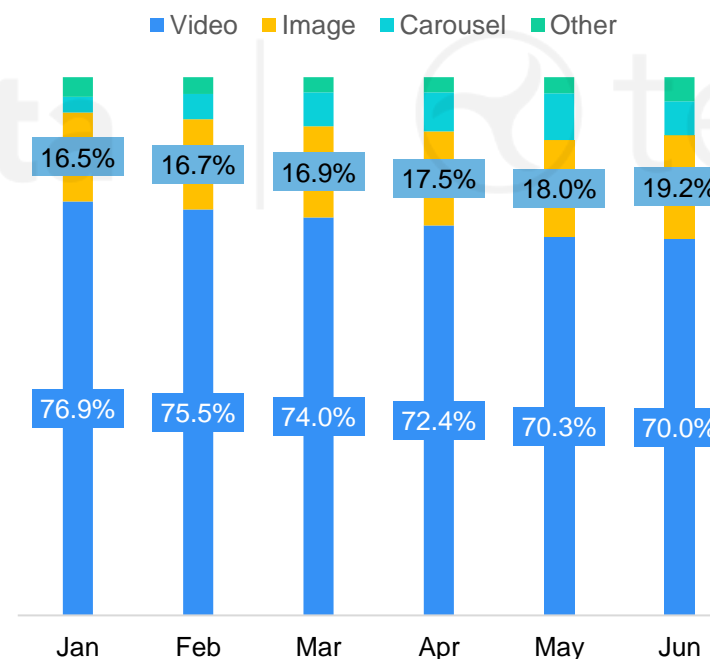
There was an obvious increase in the number of SIM game advertisers. Hong Kong, Macau and Taiwan regions of China stood out with a great number of new creatives.

- A great many idle SIM games flowed into market. ACGN Isekai and surreal auto repair became hot genres in H1 2024.
- There was a downtrend in the percentage of impressions contributed by SIM games' video creatives. Image creatives contributed nearly 20% of impressions.

The advertising of simulation game advertisers in different regions in 2024



Percentages of impressions of ad creatives by type



異世界奇妙生活

First advertising date: Mar. 2024

Total Deduplicated Creatives: 13.7K



道天錄

First advertising date: Mar. 2024

Total Deduplicated Creatives: 12.3K



工匠與旅人

First advertising date: Jan. 2024

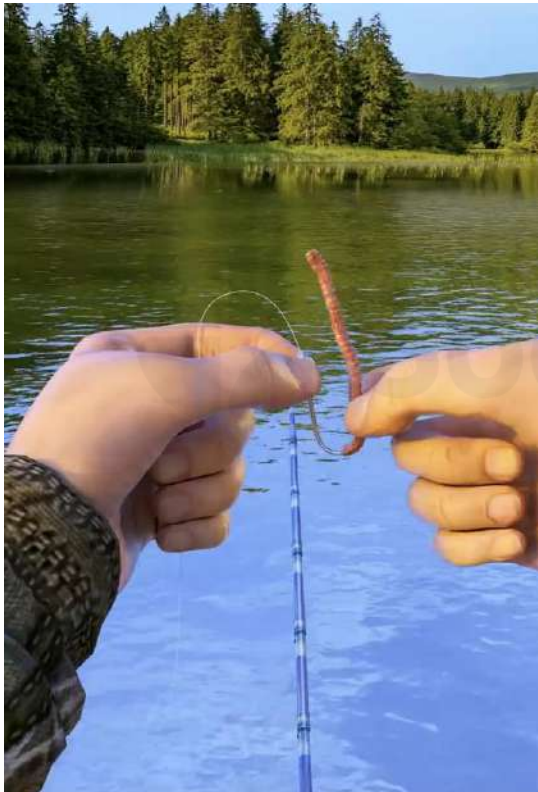
Total Deduplicated Creatives: 9.2K



Cases of Popular Creatives for SIM Games

The creatives are mainly about scene simulation and business performance display. A deliberate failure is more effective in arousing the audience's desire to play the game.

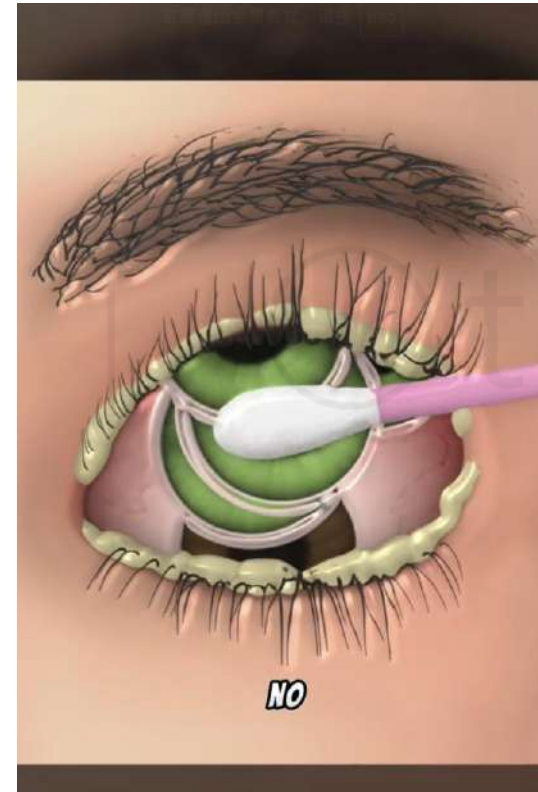
[Click to play the complete creative](#)



Ultra realistic and Immersive



Event simulation + Shop renovation



Novel and relaxing



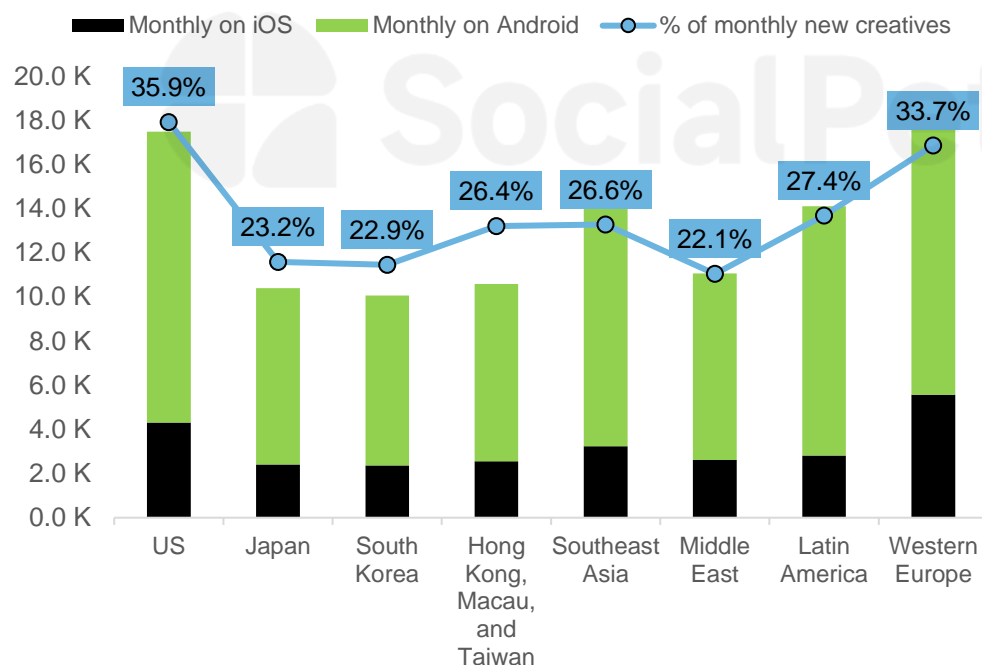
Exquisite + Challenging

Advertising of Casual + Puzzle Games

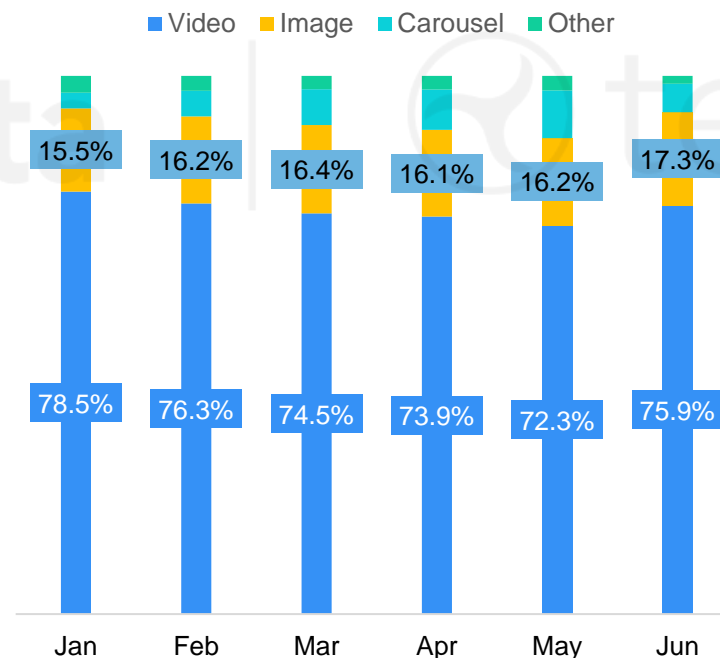
"Casual + puzzle" games outdistanced all the other genres in terms of the number of advertisers in all markets, accounting for nearly 80% on Android.

- Puzzle games are led by gameplays and ad creatives, but new creatives only accounted for 27% of puzzle games' creatives, a percentage obviously lower than those of other genres.
- In H1 2024, impressions of video creatives accounted for a stable 75%. Creatives about gameplays provided a higher conversion rate.

The advertising of casual + puzzle game advertisers in popular regions



Percentages of impressions of ad creatives by type



Drop Jelly

First advertising date: Feb 2024

Total Deduplicated Creatives: 5.8K



Clean It

First advertising date: Dec 2023

Total Deduplicated Creatives: 5K



Truck Star

First advertising date: Mar 2024

Total Deduplicated Creatives: 8.7K



Cases of Popular Creatives for Casual + Puzzle Games

The creatives often show an extremely difficult position or a deliberate failure in order to stimulate people's interest, and are especially good at acquiring users by beginning with live-action virtual reality short videos.

[Click to play the complete creative](#)



Live-action X-sports



Cosplay with virtual reality



Death challenge



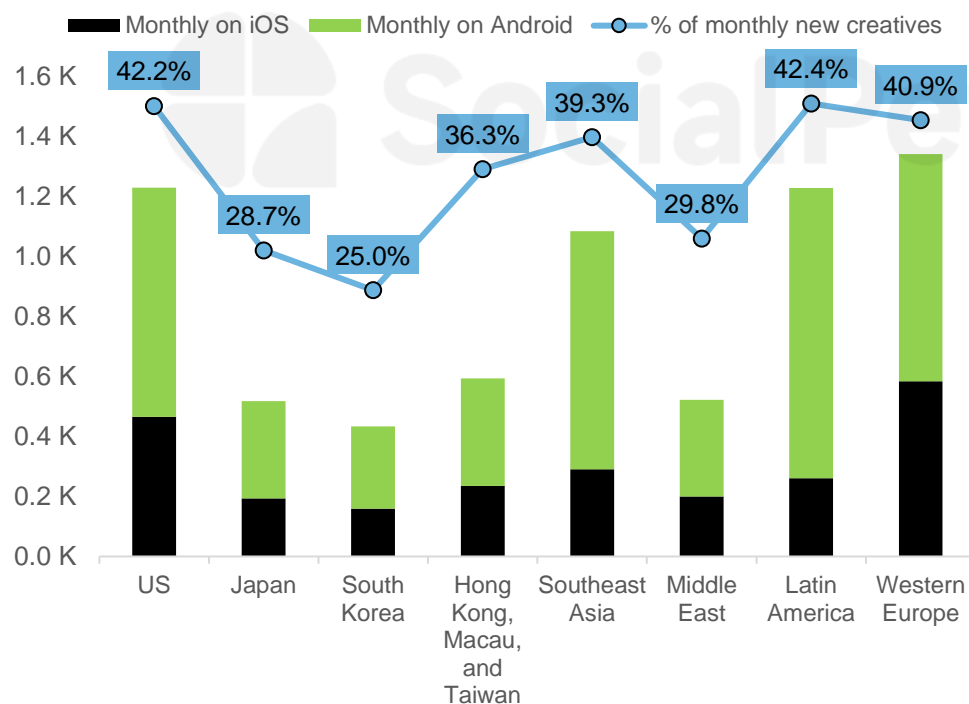
Deliberate failure

Advertising of Casino Games

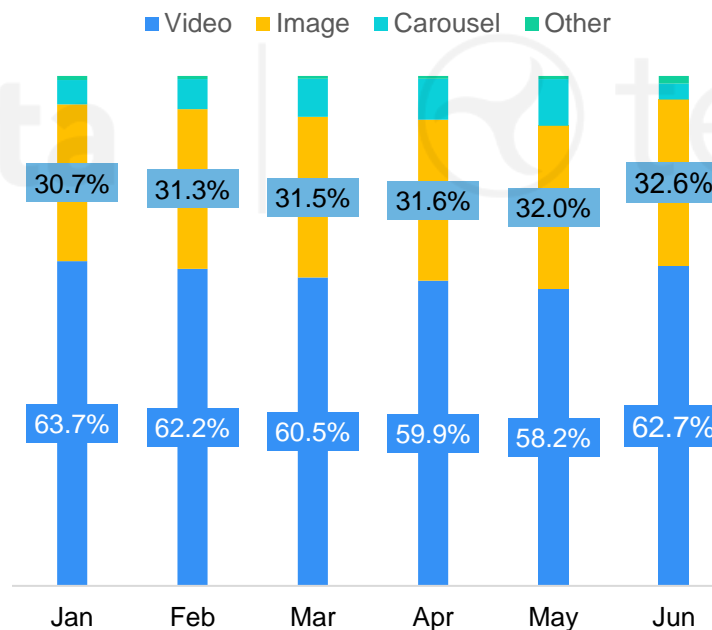
The market of the US, Southeast Asia, and Latin America had great advantage. Slot gameplay made up a majority of the total creatives.

- Android contributed more creatives than iOS. The list of top casino games by advertising was still dominated by old games.
- The advertising of casino games in Japan, South Korea, and the Middle East was relatively restrained, due to the national conditions and cultural environment of those countries and regions.

The advertising of casino game advertisers in different regions in 2024



Percentages of impressions of ad creatives by type



Tycoon Casino Vegas

First advertising date: Aug. 2018

Total Deduplicated Creatives: 53K



Coin Master

First advertising date: Apr. 2016

Total Deduplicated Creatives: 90K



麻將明星3缺1

First advertising date: Aug. 2015

Total Deduplicated Creatives: 60.9K



Cases of Popular Creatives for Casino Games

The creatives often have scenes of real people with cash, a way to fully show how shocked and excited people are at the news of winning a big prize.

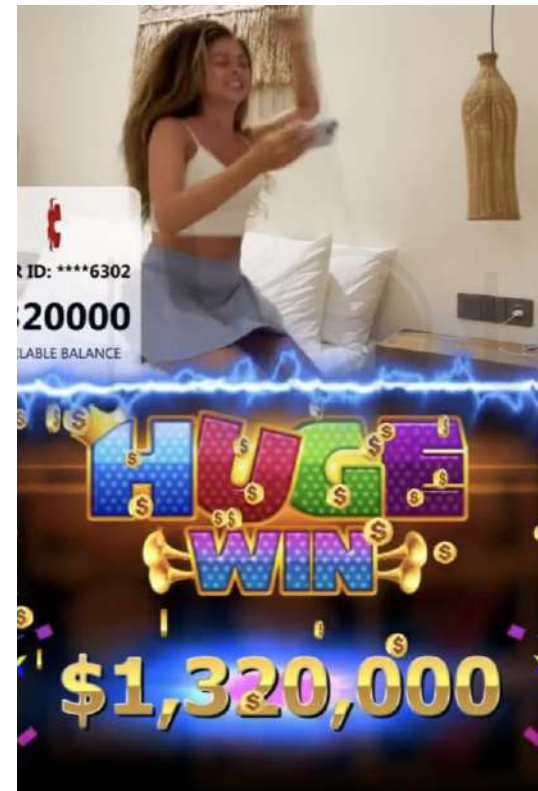
[Click to play the complete creative](#)



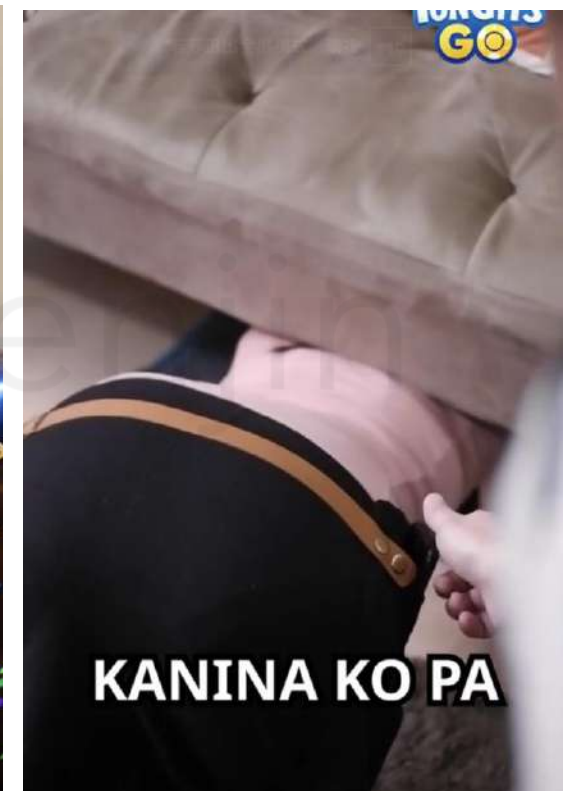
Flaunt luxuries



Lure of cash and suspense



Reaction to a big prize



Sexy and dramatic

05

Marketing Cases of Popular Mobile Games in H1 2024

Insights into the Marketing of Popular Mobile Games: Light SLG

The game remained the No.1 by revenue among all Chinese games released globally for several months, thanks to its perfect integration of a parkour-shooter mini-game into a SLG gameplay.

Last War: Survival

A mixed light SLG by First Fun

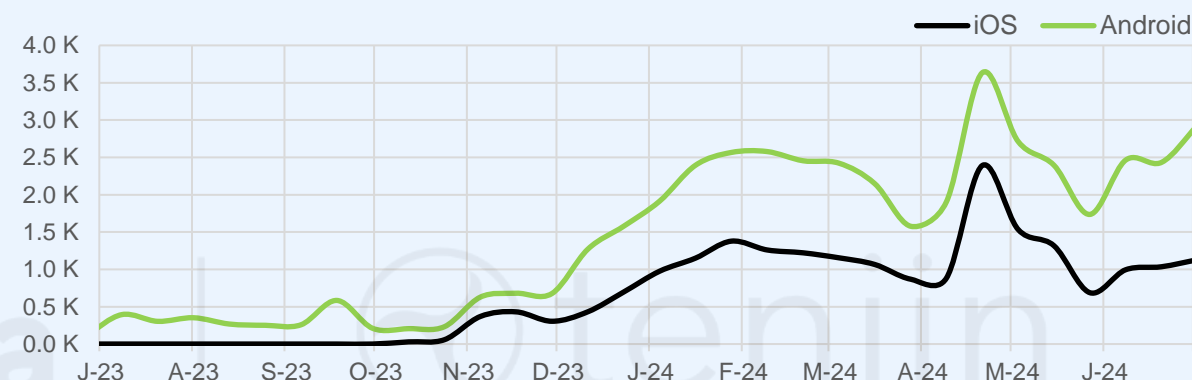
Advertising Data

First advertising date: Mar. 2023

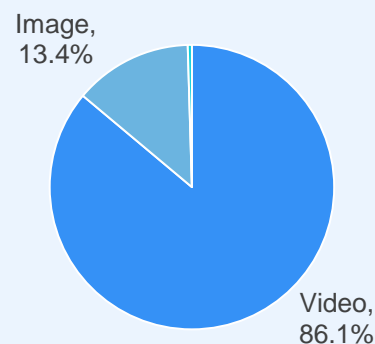
Total deduplicated creatives: 22.1K



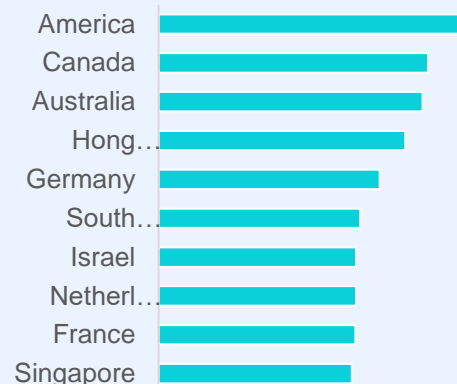
The game's ad creatives released on iOS and Android



% of creatives by type

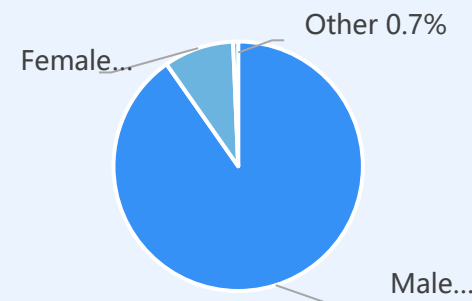


Top 10 countries/regions by advertising

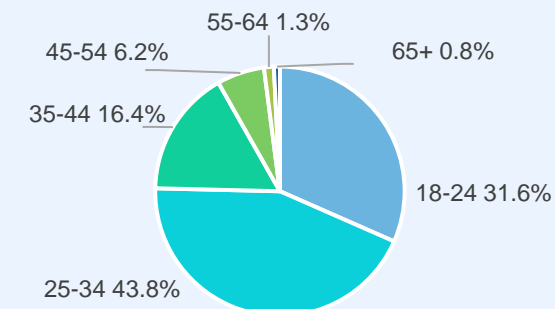


Advertising Audience Analysis

Gender Distribution



Age Distribution





Last War's Excellent Active Ad Creative



Released on: YouTube

Estimated Impressions : 10M

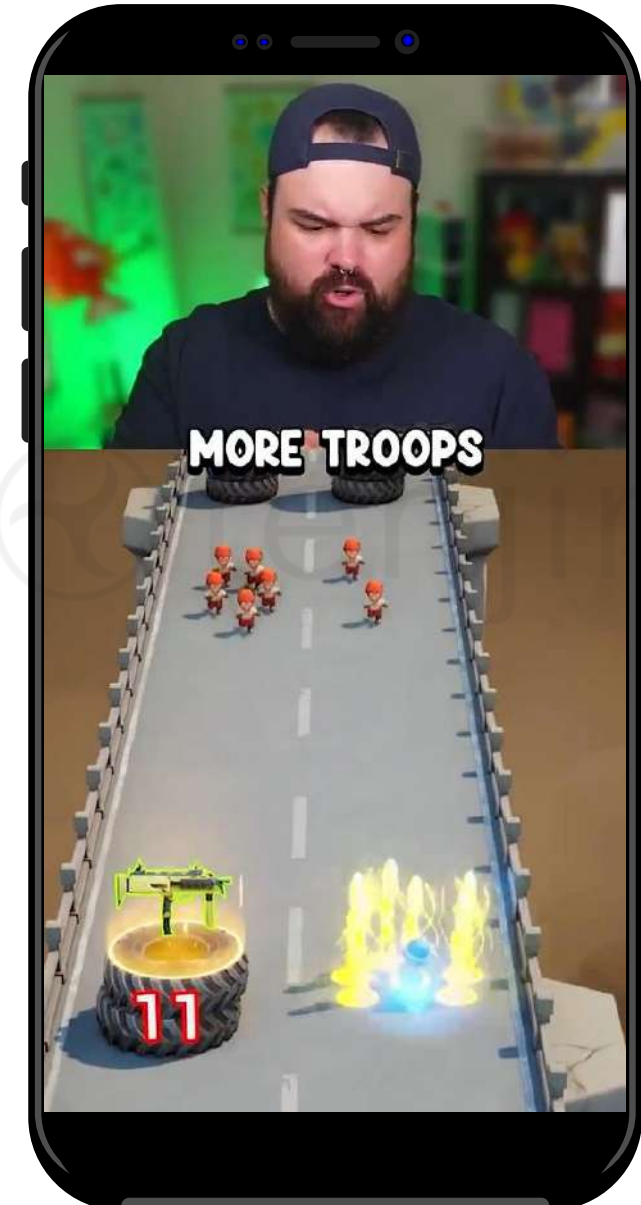
Features: The game's ad creatives are all about "**parkour and shooting for level-up**", focusing on a high integration of ad creatives (mini-game) and the game itself. Besides, **live-action element is added to make the game's ad creatives more convincing.**

78.7K

Likes

45.2K

Estimated
Conversions



Click to play the complete creative

Insights into the Marketing of Popular Mobile Games: Minigames

The game was the best among all minigames that had gone global in H1 2024. It was first released as [菇勇者传说] in China's Hong Kong, Macao, and Taiwan regions before it launched its South Korean, Japanese, English, and Southeast Asian versions.

Legend of Mushroom

A globally released minigame by 4399

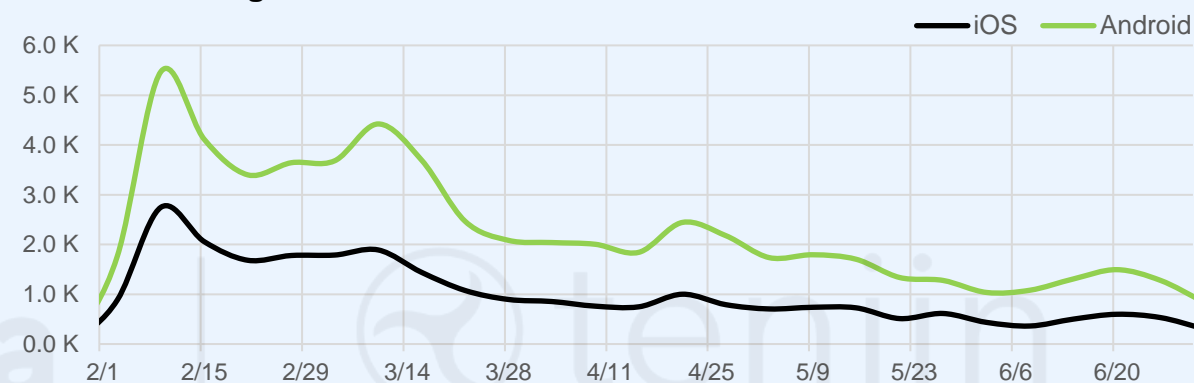
Advertising Data

First advertising date: Feb. 2024

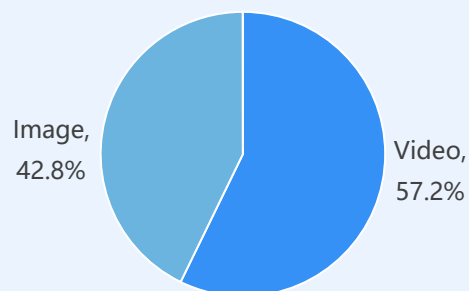
Total deduplicated creatives: 27.2K



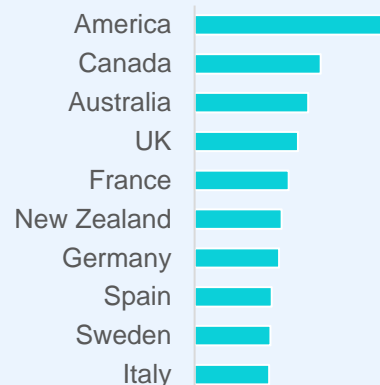
The game's ad creatives released on iOS and Android



% of creatives by type

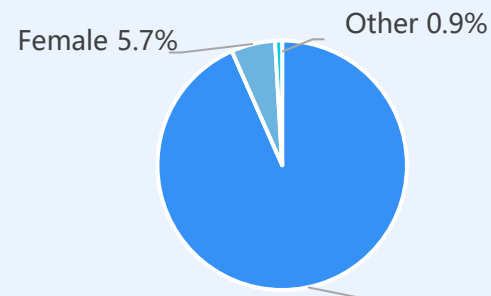


Top 10 countries/regions by advertising

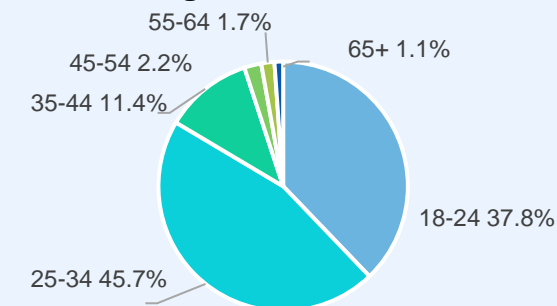


Advertising Audience Analysis

Gender Distribution



Age Distribution



- Source: Advertising data were from SocialPeta – Advertiser Analysis; the advertising audience data are summarized data and only for your information.
- Date Range: Feb – Jun 2024; As the game was released with different packages in different regions, the advertising here is mainly about the game's English version [Legend of Mushroom].

Legend of Mushroom's Excellent Active Ad Creative



Released on: **facebook**

Duration: 93 days

Features: AIGC ad creatives are a new marketing trend among game advertisers in 2024. The following creative is an example of AI image with animation effects, providing better overall quality and leaving some space for audience to imagine. And the words "**Free 3000 Pulls**" are also an immediate attraction.

715.1K

Estimated
Impressions

400+

Estimated
Conversions



[Click to play the complete creative](#)

Insights into the Marketing of Popular Mobile Games: Idle RPG

Since its release, the game has remained on the App Store's best-selling games list in Taiwan (China) for several consecutive days, demonstrating strong social stickiness as an idle RPG.

出發吧麥芬

An adventure idle MMO by XD Inc.

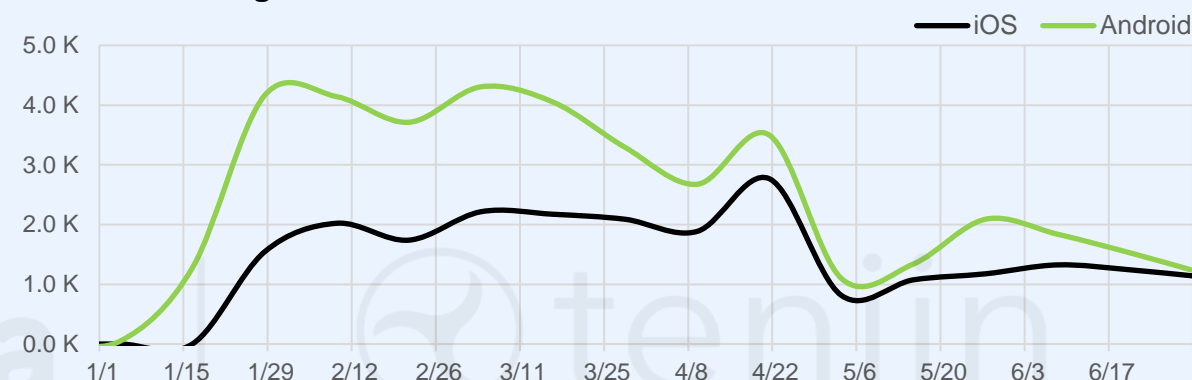
Advertising Data

First advertising date: Dec. 2023

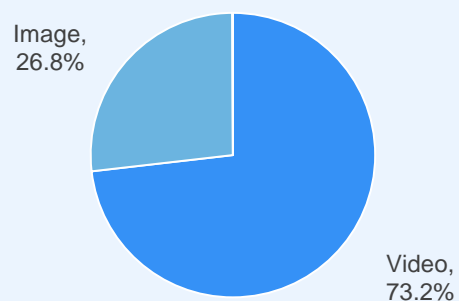
Total deduplicated creatives: 16.9K



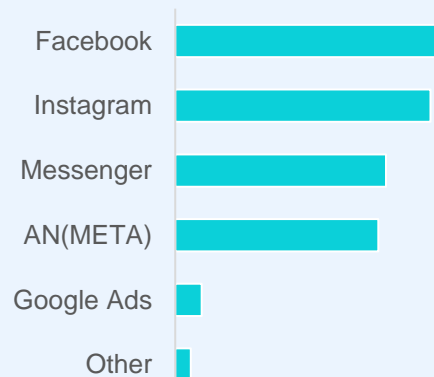
The game's ad creatives released on iOS and Android



% of creatives by type

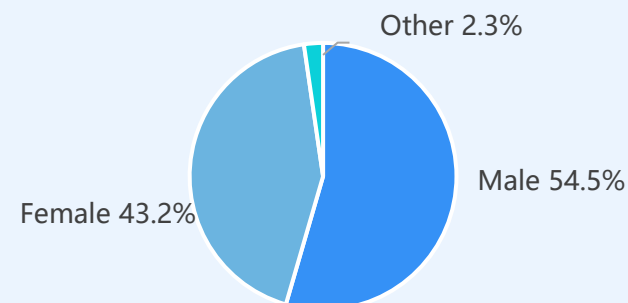


Top advertising platforms

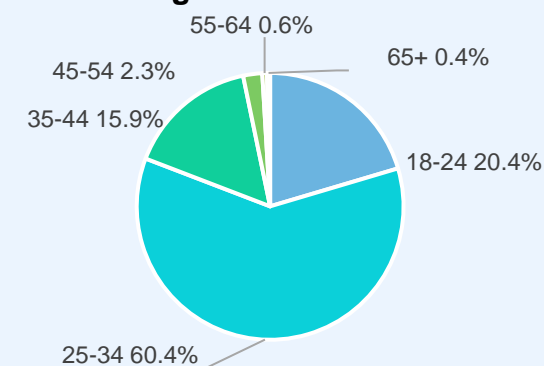


Advertising Audience Analysis

Gender Distribution



Age Distribution





出發吧麥芬's Excellent Active Ad Creative



Released on:  Google Ads

Duration: 70+ days

Features: It's a **live-action creative**, mainly made up of a hot short-video pattern and some in-game contents, an easier way to draw attention. Moreover, **the characters change every day**, telling the audience that the game is idle and doesn't need that much grinding to enjoy it.

78.7K

Estimated
Impressions

477

Popularity



Click to play the complete creative

Insights into the Marketing of Popular Mobile Games: Game Adaptations of Anime IPs

It's a mobile game adaptation of the hot anime "Solo Leveling". Its open beta was on 8 May. The game topped the list of free games in US, Japan, and other countries/regions upon its release.

Solo Leveling: Arise

Action & adventure RPG by Netmarble

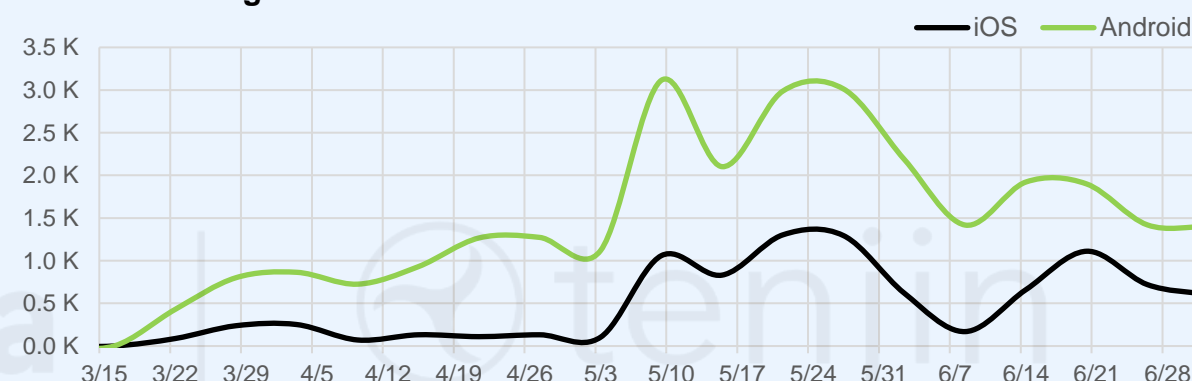
Advertising Data

First advertising date: March 2024

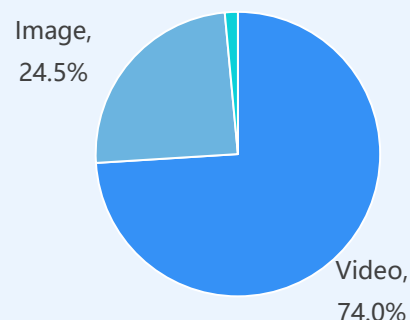
Total deduplicated creatives: 14.0K



The game's ad creatives released on iOS and Android



% of creatives by type



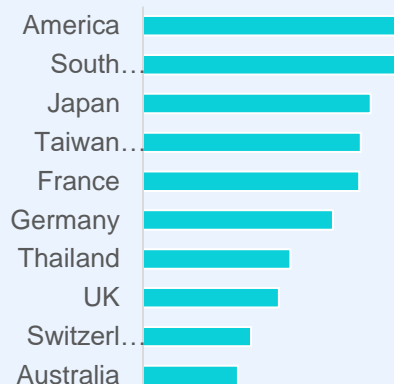
Resolution of most video creatives:

720*1280

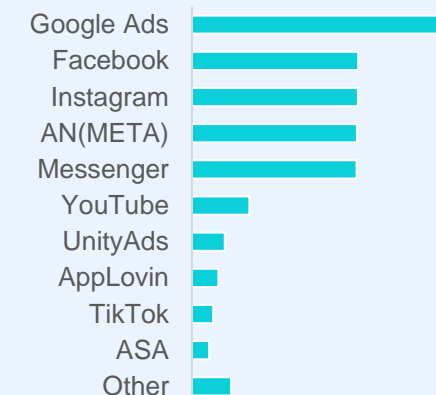
Resolution of most image creatives:

1200*628

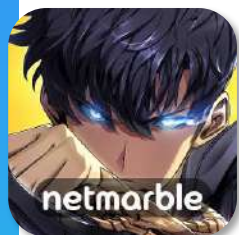
Top 10 countries/regions by advertising



Top advertising platforms



Solo Leveling: Arise's Excellent Active Ad Creative



Released on:  **TikTok**

Release date: 8 May 2024

Features: Games adapted from anime IPs mainly **target fans of the IPs**, so it's crucial that creatives for such a game show how much it has in common with the anime IP. The creative also reveals that it has 12 million pre-registrations, to further attract those hesitating gamers.

412.6K

Likes

76.2K

**Estimated
Conversions**



[Click to play the complete creative](#)

Insights into the Marketing of Popular Mobile Games: Match-3+ Games

The game grossed over 3 billion US dollars in revenue, making it the highest-grossing match-3 mobile game in 2024.

Royal Match

A highest-grossing match-3 game by Dream Games

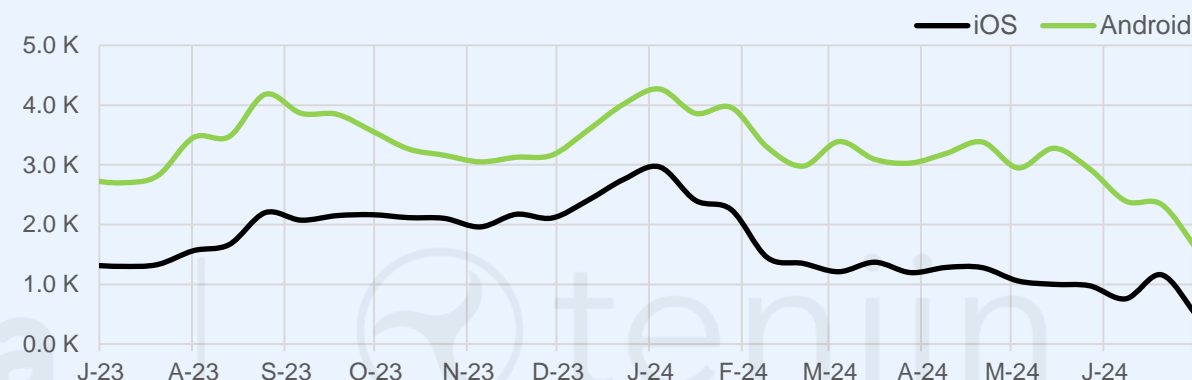
Advertising Data

First advertising date: July 2020

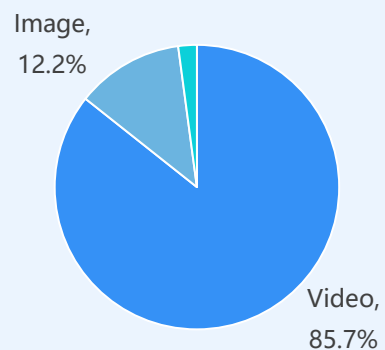
Total deduplicated creatives: 65.3K



The game's ad creatives released on iOS and Android



% of creatives by type

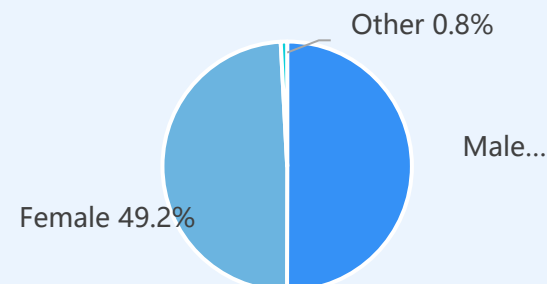


Top 10 countries/regions by advertising

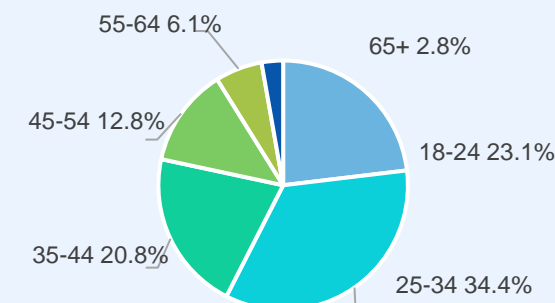


Advertising Audience Analysis

Gender Distribution



Age Distribution





Royal Match's Excellent Active Ad Creative



Released on: **facebook**

Duration: 50+ days

Features: It is a **high-quality and problem-solving creative** for a match-3+ game. The creative shows the process of playing 2 levels in the game. The first level is played through without accident, but the second level fails, a way to reduce the bounce rate.

2.5M

Estimated Impressions

513

Popularity

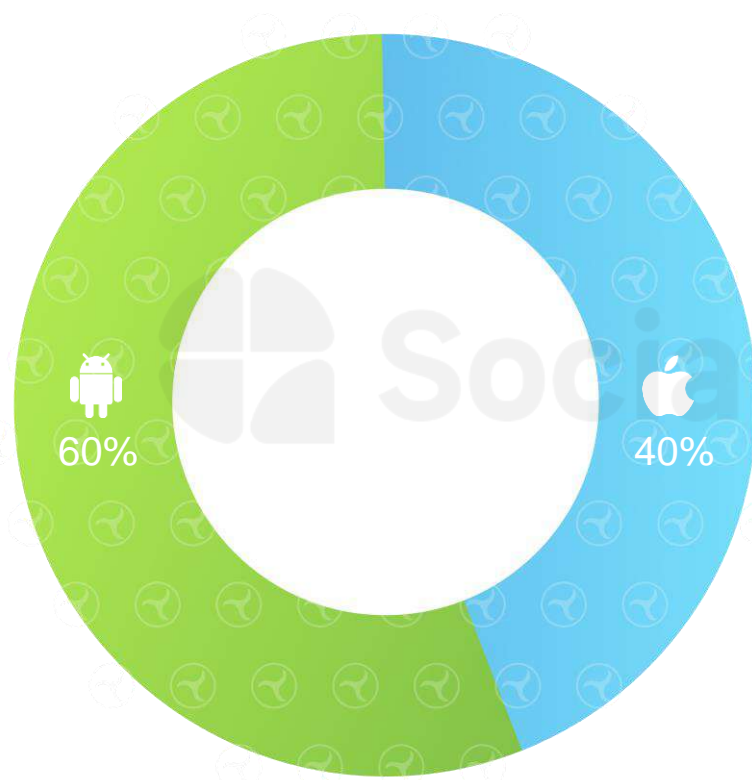


Click to play the complete creative

06

H1 2024 Ad Spend Trends in Mobile Gaming

Ad Spend Share by Platform in H1 2024

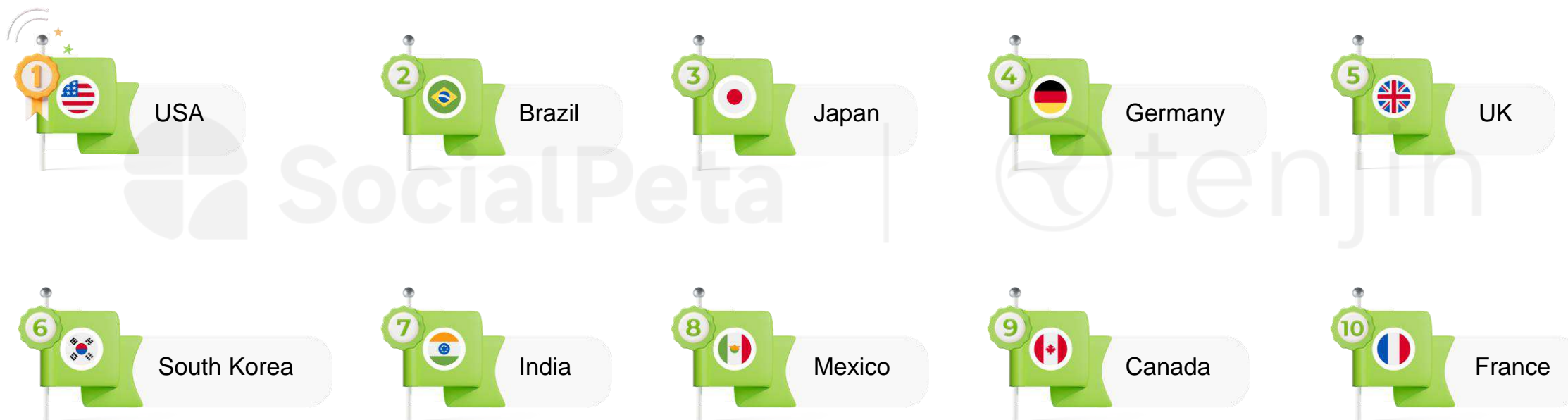


- Date Range: The report consists of anonymized data collected by Tenjin for mobile games in the date range of 01.01.24 – 30.06.24



Top 10 Countries by Ad Spend in H1 2024

Android





Top 10 Countries by Ad Spend in H1 2024

ios





Top 10 Ad Networks by Ad Spend in H1 2024

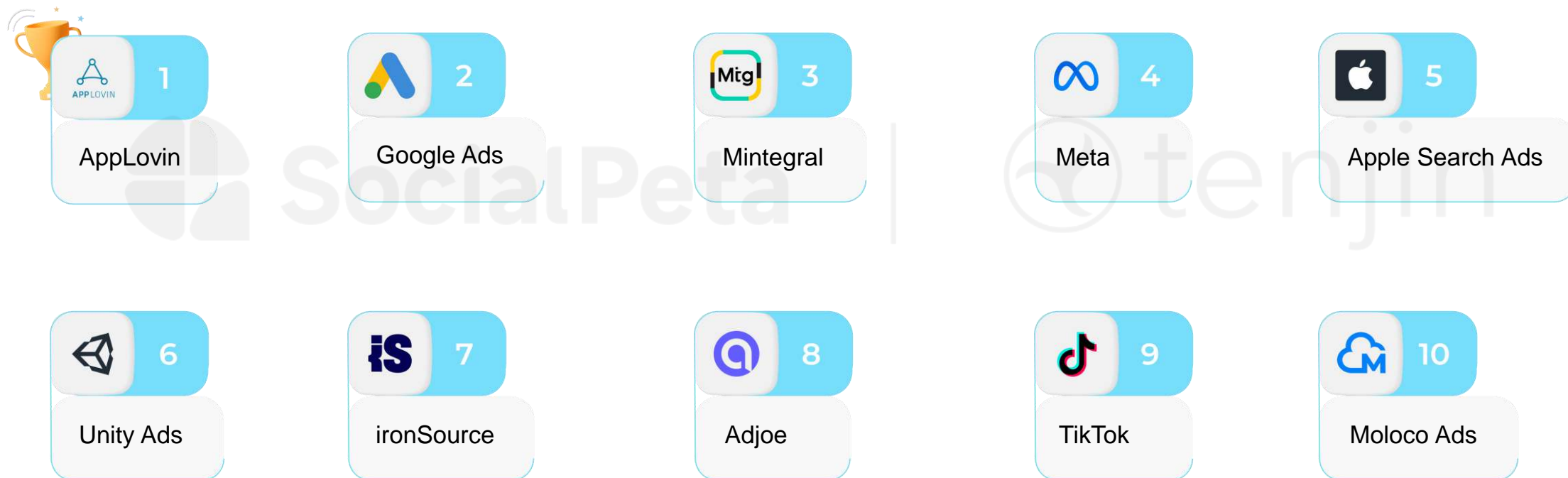
Android





Top 10 Ad Networks by Ad Spend in H1 2024

iOS



07

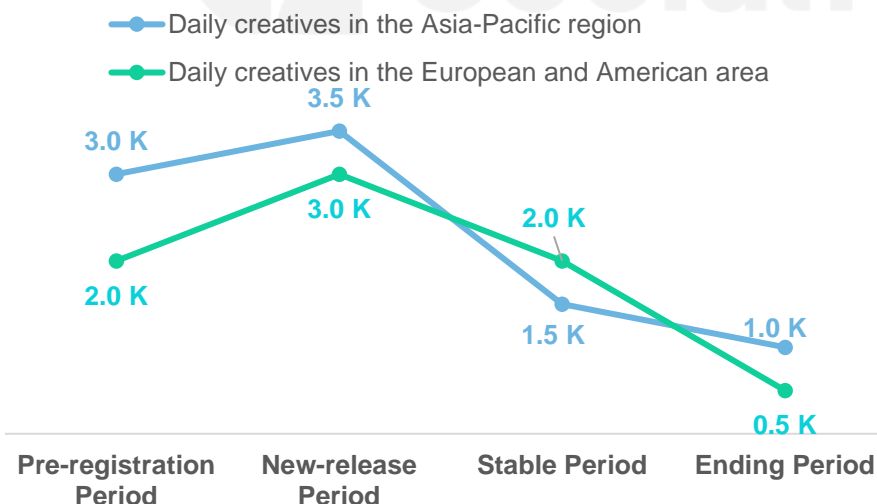
H1 2024 Exclusive Insights into the Marketing of Games

Top 10 Minigames by Advertising in H1 2024

- According to the captured data, the marketing of minigames released in Asia-Pacific was obviously different from that of minigames released in Europe & America:

- **Asia-Pacific:** Focused on pre-registration and new-release periods, starting pre-registration 1 month before release and key promotion 2 months post-release.
- **Europe & America:** There were more creatives in the stable period and a longer promoting period.

Creatives during different periods for minigames



#	Game Name	Gameplay	Deduplicated Creatives	First Advertising Date	Publisher
1	 Legend of Mushroom	Open boxes + Idle	26K	Feb 2024	4399
2	 Doodle Magic	Bullseye (Original)	21.5K	Nov 2023	Dream Of Dragon
3	 BangBang Survivor	Bullseye-like	19.9K	Apr 2024	SPGame
4	 Rent Please! Landlord Sim	Business Simulation	18K	Dec 2022	Shimmer Games
5	 新武俠大明星	Chicken-like	16.9K	May 2024	Vision Wide
6	 道天錄	Business Simulation	11.4K	Mar 2024	Eskyfun
7	 Zombie.io	Zombie-like	10.8K	May 2023	4399
8	 キノコ伝説	Open boxes + Idle	9.8K	Jan 2024	4399
9	 王子變變變	Slime-like	8.9K	Apr 2024	GameArk
10	 Top Heroes	Mercenaries-like + SLG	8.3K	Dec 2023	RiverGame

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

Top Games on Steam by Advertising in H1 2024

- 4 of the Top 10 games were newly released in 2024, among which the top 1 game [VALIANT TACTICS EX] was released for Steam on 29 March 2024.
- Steam games focus their advertising on two periods. One period starts upon a game's release, generally lasting about 20 days. The other period is during a game's major discount events, for example "Steam Summer Sale", which usually lasts about 15 days.

NO.41






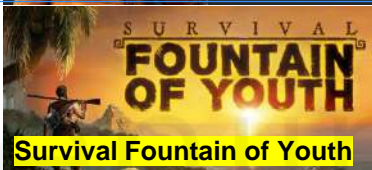




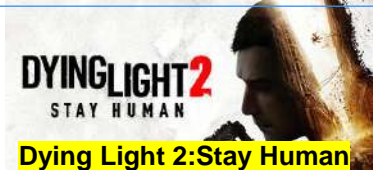

Black Myth Wukong

Release date: 20 Aug 2024

First advertising date: 28 May 2024

Total popularity: 15.4k

Total creatives: 247

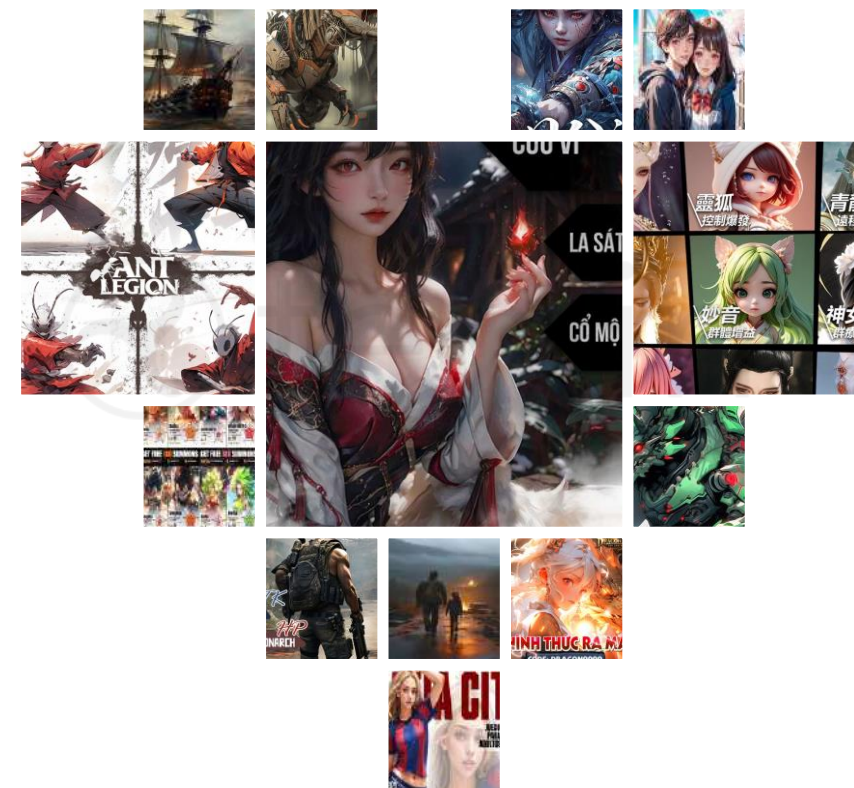
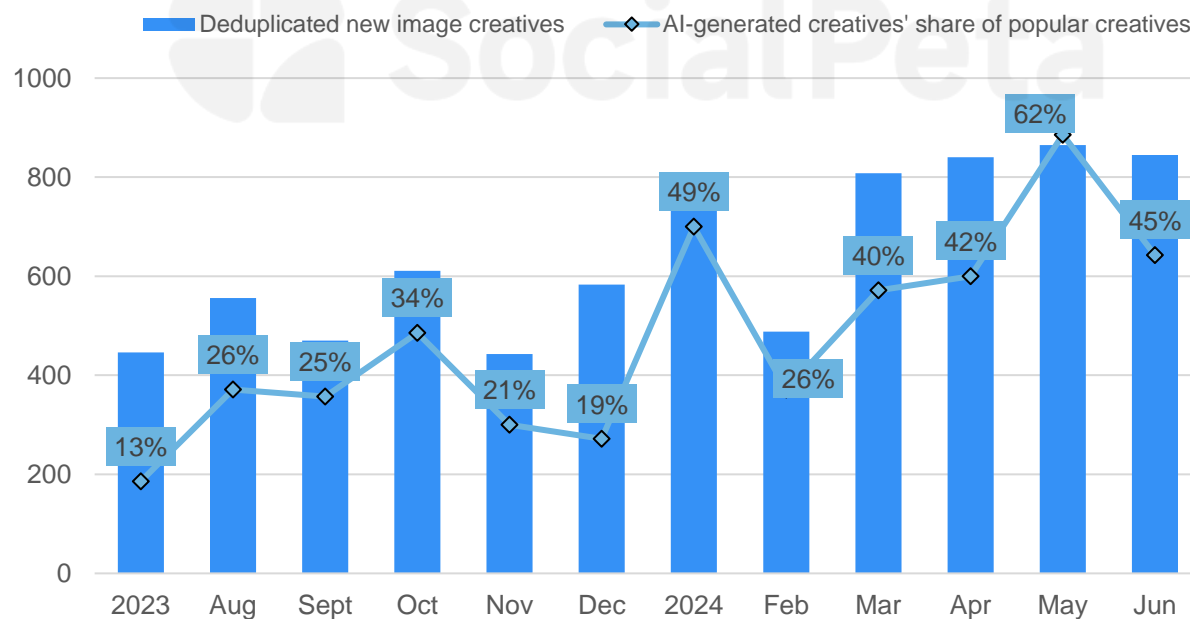
#	Game Name	Popularity	#	Game Name	Popularity
1	 VALIANT TACTICS EX	103.1K	6	 SCUM	59.7K
2	 Lost Ark	181.1K	7	 Survival Fountain of Youth	48.2K
3	 PUBG BATTLEGROUNDS	77.5K	8	 MGS3: Snake Eater Master Collection Version	43.4K
4	 PSO2 NGS	56.0K	9	 Hotel Business Simulator	42.8K
5	 Dying Light 2: Stay Human	93.9K	10	 RKGK/Rakugaki	47.1K

AIGC Changed the Marketing of Mobile Games

Some RPG and SLG advertisers used AI-generated ad creatives extensively.

- Advertisers with huge quantities of ad creatives had used AI-generated image creatives massively.
- Video creatives usually prioritized the apps' scenes. But there were also the following popular types (click to play):
 - AI-generated image creatives (mostly images of beauties):
 - AI-generated images + AI-generated writings + AI-generated audios
 - AI-generated images + Animated images made by Dream Machine (publicizing the game world)

Image creatives of a hot SLG on Android during the past year



- Source: SocialPeta – Ad Display; It was the reporter's personal opinion that the creatives were AI-generated or not. For reference only.
- Date Range: Jan - Jun 2024 ;

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 – Jun 2024

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

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North America: USA, Canada, Mexico, Panama

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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

A man with a beard and two young children are lying on a light-colored carpeted floor, playing a card game. The man is on the left, looking down at the cards. A young girl with curly hair is in the middle, also looking at the cards. A young boy is on the right, looking at the cards. The background is a blurred indoor setting with bookshelves and a lamp. The entire image has a blue tint.

 **SocialPeta** |  **tenjin**