

# Insight into 2024 Marketing Trends for **Japanese Mobile Games**



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# 6M

APP Advertisers

# 1.6B

APP Ad Creatives

# 1.20M

Daily Updates

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# Contents

# CONTENTS

1

## Marketing Trends of Mobile Games in Japan

Top Mobile Games by Advertising in Japan

Insights into Media Buying Trends of Mobile Games

2

## Marketing Features of Mobile Games in Japan

Common points shared by top games

Localization of marketing in Japan

3

## Hit Games Going Global in Japan

New Hit Games Going Global

How do old games win





01

# Marketing Trends for Japanese Mobile Games

# Insights into Marketing Trends of Mobile Games in the Japan

Generally, the Japanese mobile gaming market was relatively conservative in terms of marketing, as its share of advertisers with new creatives and share of new creatives were both far below the global average level.



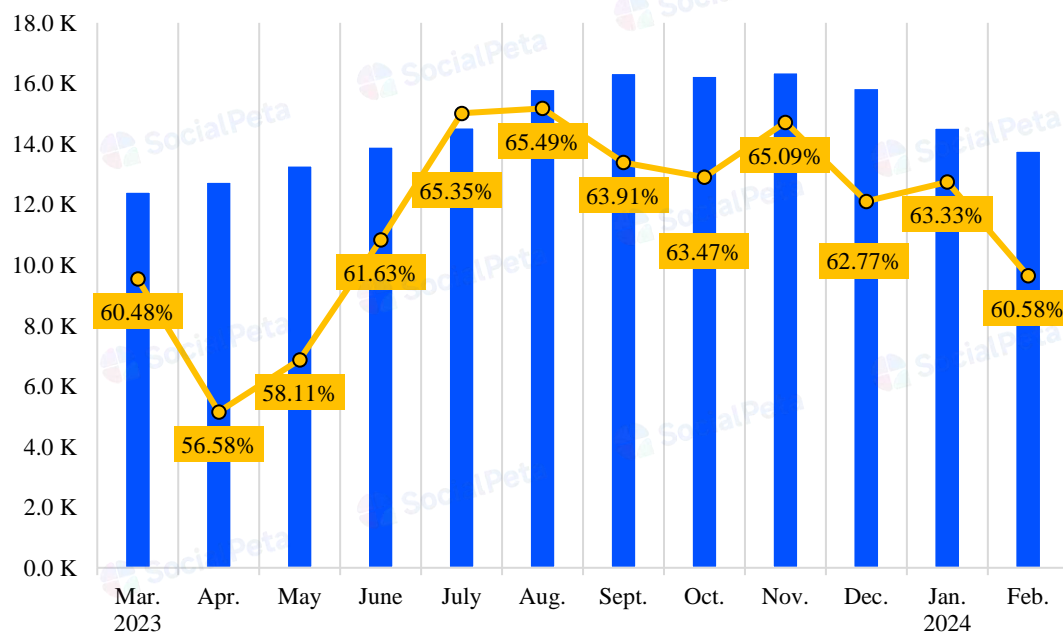
## Monthly mobile game advertisers for the last 1 year in Japan

**14.6K**

Share of advertisers with new creatives: **62.23%**  
(World's share: 72.31%)

Active Advertisers

Share of advertisers with new creatives



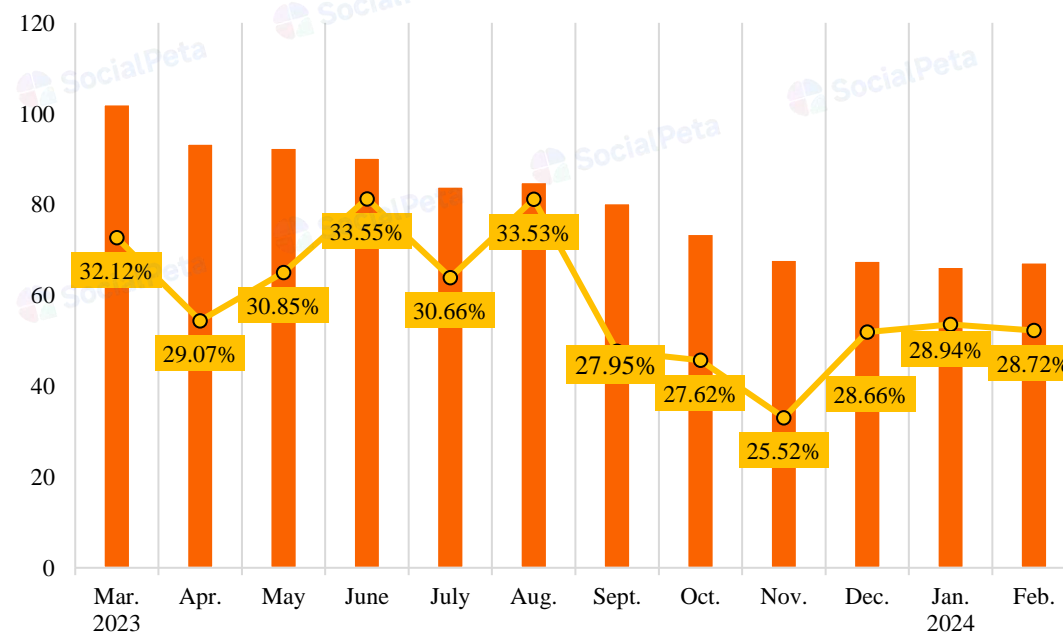
## Monthly creatives per mobile game advertiser for the last 1 year in Japan

**81**

Share of new creatives: **29.77%**  
(World's share: 59.68%)

Monthly creatives per advertiser

Share of new creatives

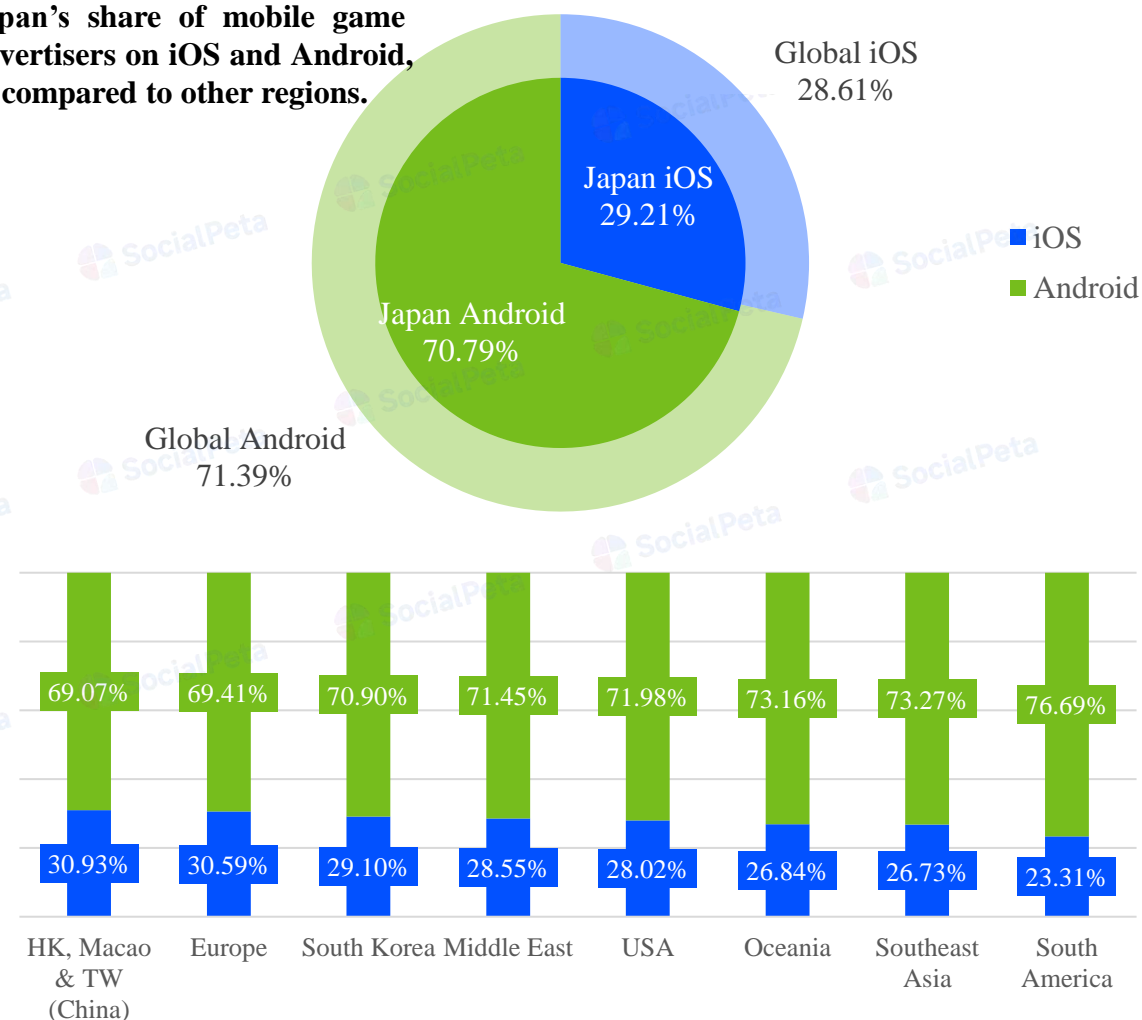


# Insights into Mobile Game Advertisers in the Japanese Market

In Japan, SIM game advertisers ranked No.3, 2% higher than the corresponding global level; iOS advertisers accounted for 29.21%, a higher percentage.

Genre	% of Advertisers	MoM	Compared to Global Results
Casual	32.61%	-0.44%	2.29%
Puzzle	13.40%	0.52%	0.06%
SIM	11.35%	0.30%	2.06%
Action	7.94%	-0.14%	0.35%
RPG	6.88%	0.12%	0.73%
SLG	4.85%	0.13%	0.29%
Adventure	3.58%	0.07%	-0.40%
Arcade	3.18%	-0.01%	-0.90%
Card	2.72%	-0.26%	-0.77%
Board	2.58%	-0.02%	-0.20%

Japan's share of mobile game advertisers on iOS and Android, as compared to other regions.

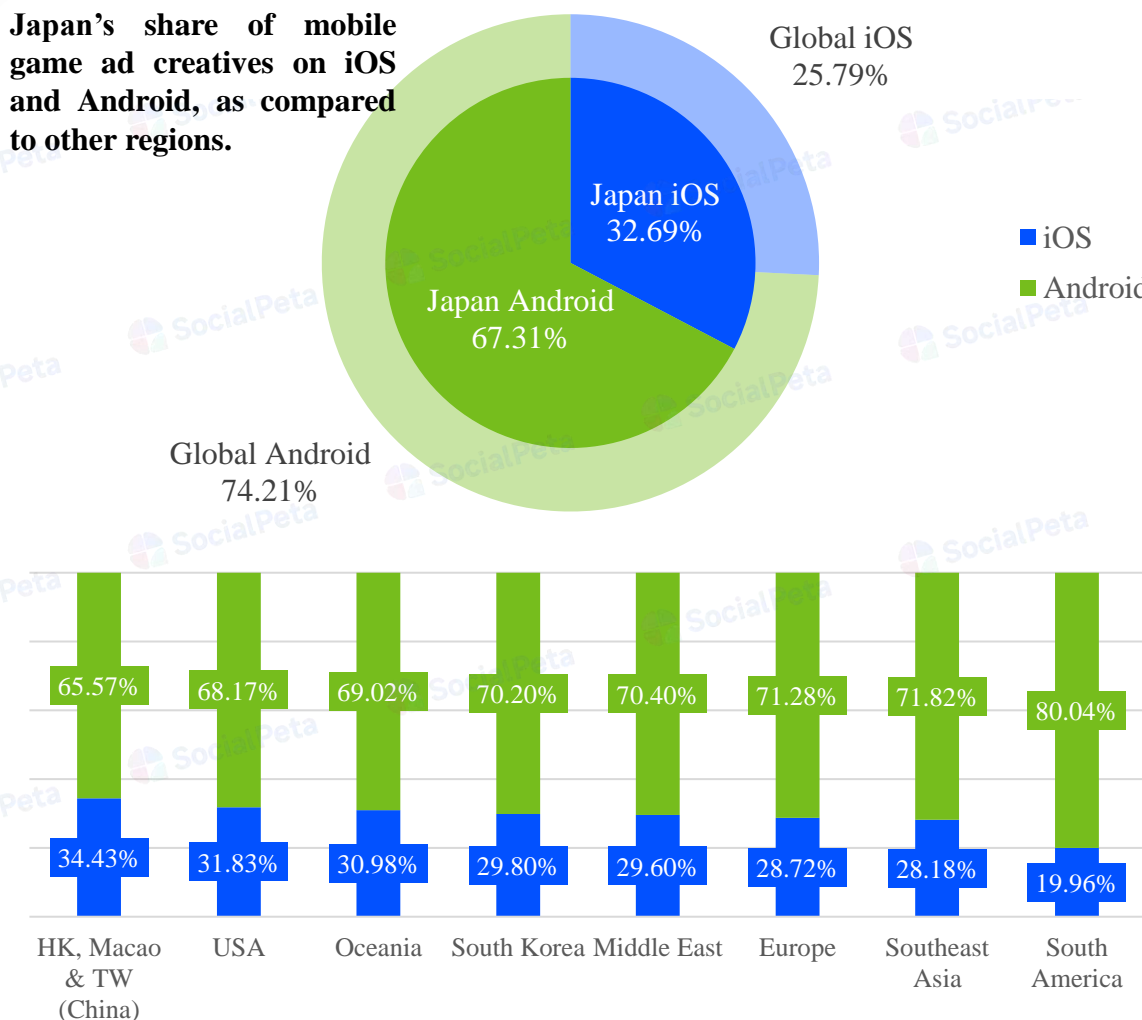


# Insights into Mobile Game Ad Creatives in the Japanese Market

In Japan, puzzle game ad creatives accounted for 1.93% higher than the corresponding global average level; iOS ad creatives accounted for 32.69%, 6.90% higher than the global average level.

Genre	% of Advertisers	MoM	Compared to Global Results
Casual	33.09%	0.45%	-0.03%
Puzzle	13.77%	-0.94%	1.93%
RPG	9.42%	0.57%	-1.29%
SIM	9.42%	-0.40%	1.88%
SLG	7.12%	-0.63%	0.33%
Action	7.07%	0.65%	0.68%
Adventure	3.13%	0.55%	0.28%
Card	2.78%	-0.27%	-1.35%
Casino	2.60%	-0.79%	-2.41%
Arcade	2.57%	0.61%	-0.59%

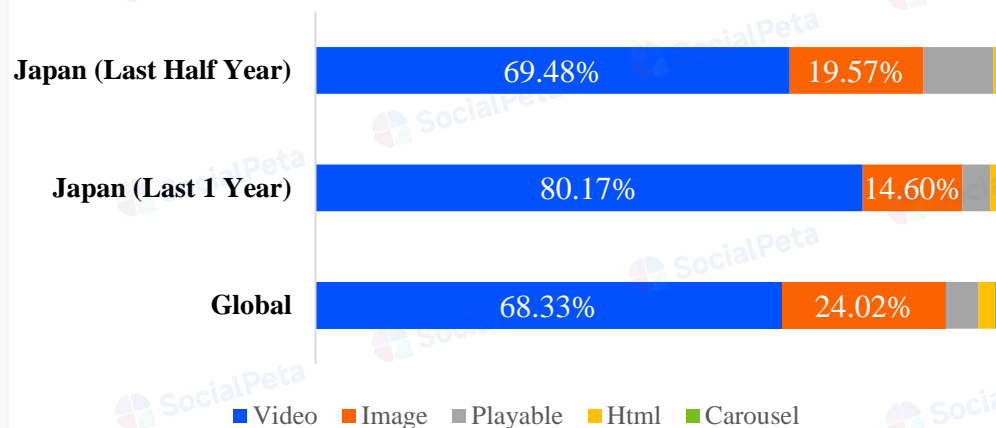
Japan's share of mobile game ad creatives on iOS and Android, as compared to other regions.





## Insights into Mobile Game Ad Creatives by Type in Japan

% of creatives by type



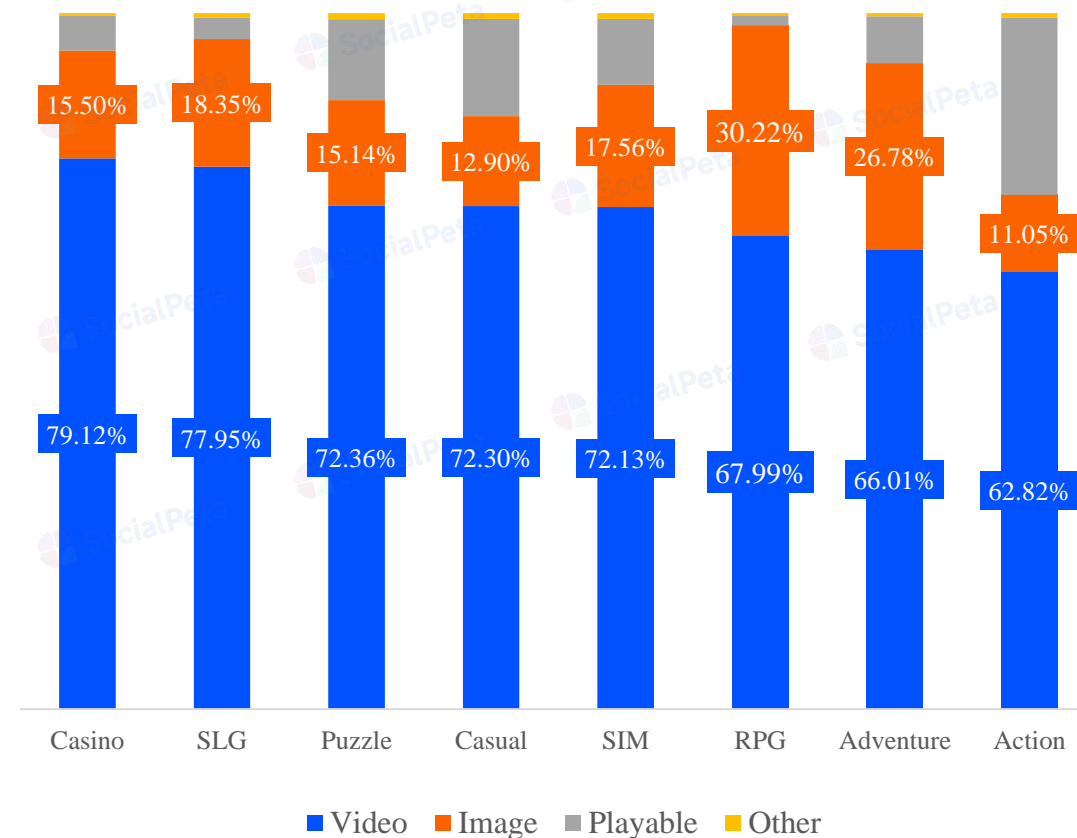
Estimated impressions per mobile game ad creative for the last half year in Japan

**215.6K**

In Japan, video ad creatives accounted for 69.48% of mobile games, 1.15% higher than the global average level, but representing a 10.69% MoM decline.

Among all popular mobile game genres in Japan, casino games reported the highest share of video creatives.

Share of ad creatives by game genre for the last half year in Japan







# Mobile Games by Advertising in Japan | iOS TOP 30

1		<b>マジックカード</b> Bingchuan Network	RPG
2		<b>KARIZ</b> Zlongame	RPG
3		<b>おねがい社長!</b> EWORLD	SIM
4		<b>キノコ伝説</b> 4399	RPG
5		<b>Mighty Party</b> Panoramik Games	RPG
6		<b>聖闘士星矢レジェンドオブジャスティス</b> Wanda Cinemas Games	RPG
7		<b>X-ヒーロー</b> Bingchuan Network	RPG
8		<b>Braindom 2</b> Matchingham Games	Casual
9		<b>Arena Breakout</b> Tencent	Action
10		<b>Braindom 3</b> Matchingham Games	Casual

1		<b>ドリーミーランド</b> 悦創時代	SIM
2		<b>エボニー</b> Top Games	SLG
3		<b>ホワイトアウト</b> Century Games	SLG
4		<b>Land Arcana</b> SpringGame	RPG
5		<b>ドット勇者</b> Efun & More2Game	RPG
6		<b>ぼちゃガチャョ!</b> Qingci Games	Casual
7		<b>ダダサバイバー</b> Habby	Action
8		<b>ドラゴンスケープス</b> Century Games	SIM
9		<b>Hero Wars</b> Nexters	RPG
10		<b>時計物語</b> SpringGame	RPG

1		<b>パズル&amp;サバイバル</b> 37Games	SLG
2		<b>霧の大陸</b> FunPlus	SLG
3		<b>いけー! 放置戦士</b> 7 Pirates Games	RPG
4		<b>Block Blast!</b> Hungry Studio	Puzzle
5		<b>ゴールデンホイヤー</b> IGS	Casino
6		<b>ロイヤルマッチ</b> Dream Games	Puzzle
7		<b>三国合戦ラッシュ</b> TanWan Games	RPG
8		<b>ドラゴンエア</b> Nuverse	RPG
9		<b>フローズン</b> Century Games	SIM
10		<b>Happy Match Café</b> Kings Fortune	Puzzle



# Mobile Games by Advertising in Japan | Android TOP 30

1		<b>マジックカード</b> Bingchuan Network	RPG	1		<b>エボニー</b> Top Games	SLG	1		<b>War Robots PvP</b> MY.GAMES	Action
2		<b>Braindom</b> Matchingham Games	Casual	2		<b>Woodoku</b> Tripledote	Puzzle	2		<b>極道風雲</b> Yotta Games	SLG
3		<b>Braindom 2</b> Matchingham Games	Casual	3		<b>ドラゴンエア</b> Nuverse	RPG	3		<b>ドット勇者</b> Efun & More2Game	RPG
4		<b>ドラゴンスケープス</b> Century Games	SIM	4		<b>聖闘士星矢レジェンドオブジャスティス</b> Wanda Cinemas Games	RPG	4		<b>Royal Cat Puzzle</b> Remi Vision	Puzzle
5		<b>おねがい社長!</b> EWORLD	SIM	5		<b>木こりの帝国</b> Game Veterans	SIM	5		<b>Alice's Dream</b> Newborn Town	Puzzle
6		<b>KARIZ</b> Zlongame	RPG	6		<b>マッチングトン</b> Magic Tavern	Puzzle	6		<b>ステート・オブ・サバイバル</b> FunPlus	SLG
7		<b>1945 Air Force</b> OneSoft	Action	7		<b>Mighty Party</b> Panoramik Games	RPG	7		<b>Braindom 3</b> Matchingham Games	Casual
8		<b>キノコ伝説</b> 4399	RPG	8		<b>Hero Wars</b> Nexters	RPG	8		<b>ガーデンスケイプ</b> Playrix	Puzzle
9		<b>ロードモバイル</b> IGG	SLG	9		<b>違うものをさがせ!</b> Hippo Lab	Puzzle	9		<b>ダダサバイバー</b> Habby	Action
10		<b>パズル&amp;サバイバル</b> 37Games	SLG	10		<b>LINE POP2</b> Line	Puzzle	10		<b>Demon God(Global)</b> JunHai Games	RPG





02

# Marketing Features of Mobile Games in Japan

# Top Local Mobile Game Companies in Japan

Japan is a country with a deep gaming culture, where many companies have accomplished much in console games and animations.

- Japan had a very early start in gaming industry, and now there are many game companies of over 15 years. However, some companies that enjoy the first-mover advantage of console and other game devices would find it hard to transition their business to mobile devices.
- Japanese game publishers are often engaged in the publishing of mobile games, as well as animations and music works, as a result, many Japanese mobile games boast prominent stories, music, and art, making them stand out from other regions' games.
- And, lots of Japanese games have been running for years with distinctive gameplays. Japan's local companies are very competitive in the local game market.



Featuring IP-based mobile games  
[龙珠Z Dokkan Battle], [航海王 启航]



Well-known for its sports games  
[Pro Evolution Soccer] series,  
[Professional Baseball Spirits A]



The biggest social media network  
in Japan  
[Monster Strike], XFLAG brand



A long-established game company that  
owns many game franchises  
[Final Fantasy Brave Exvius], [Dragon  
Quest: The Adventure of Dai]



A subsidiary of Sony, and a famous  
anime production company  
[Fate/Grand Order], [Magia Record:  
Puella Magi Madoka Magica Side Story]



Its games stand out with their art  
styles and stories  
[Uma Musume Pretty Derby],  
[Shadowverse], [Granblue Fantasy]



An old game company established  
in 1998  
[Puzzle & Dragons], [Ragnarok  
Online] series



One of the oldest Japanese game  
companies  
[Sonic] series, [Project SEKAI:  
Colorful Stage! feat. Hatsune Miku]



A long-established company known  
for its historical SIM games  
[Dynasty Warriors] series,  
[Nobunaga's Ambition] series

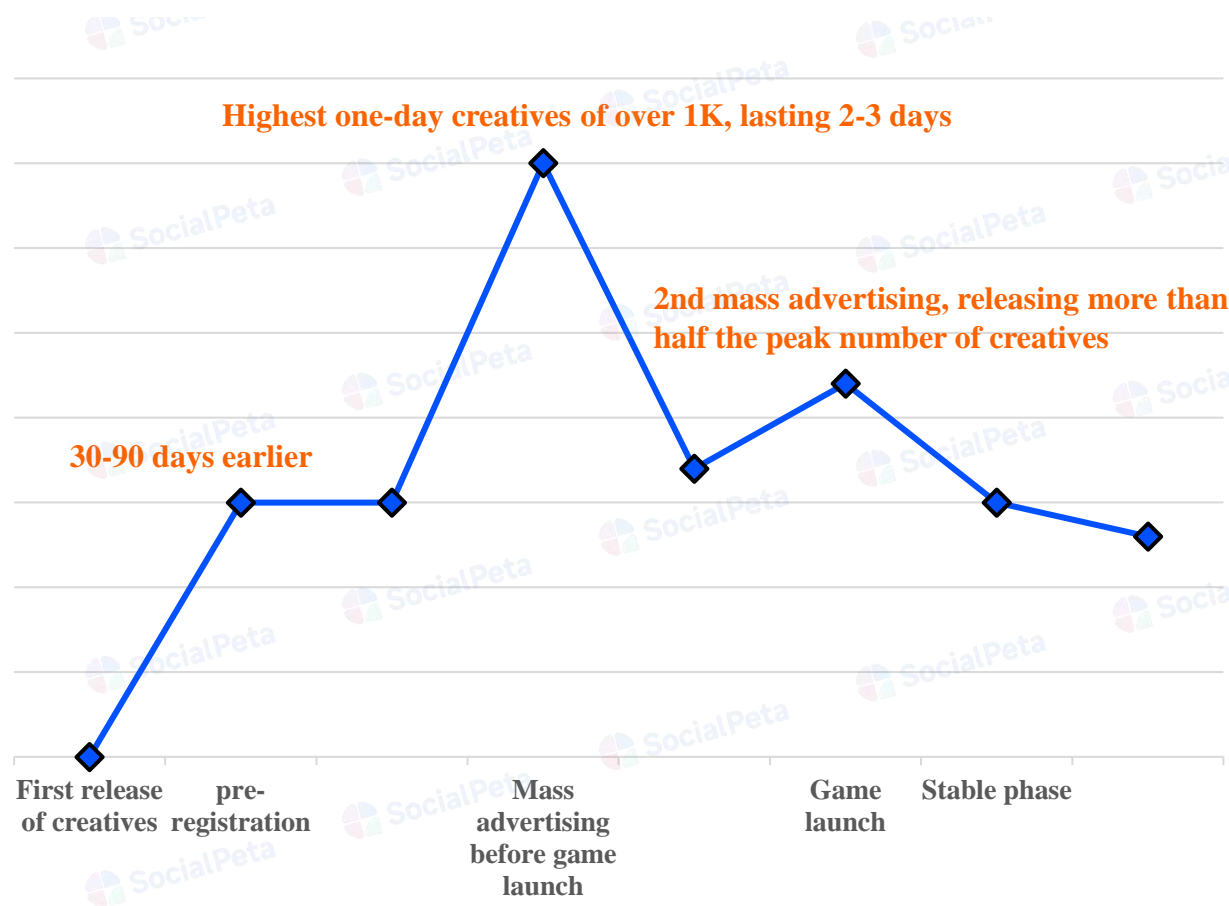


An anime and game publisher  
[Another Eden: The Cat Beyond  
Time and Space], [White Cat  
Project], [Heaven Burns Red]





## Pre-registration - the First Step of Mobile Games Marketing in Japan



### Recommended rewards for pre-registration

10,000	50,000	100,000	200,000	500,000
In-game gold	Game resources (EXP or weapons)	Consecutive draws in ordinary pool	Limited characters	Consecutive draws in special pool

#### Pre-registration rewards

- In-game rewards: tokens, limited characters...
- In-kind rewards: PS5, phones, figurines...

#### Info revealed

Exclusive story pv, game endorser, popular voicers, game ost, off-line events...



## Anniversary celebrations:

In the Japanese mobile gaming industry, anniversaries are very important, because they are important milestones in a game's lifetime and also the crucial time to reward loyal gamers. In the past, anniversaries were often celebrated for games, but now there are many half-anniversaries celebrated because marketing is getting more fast-paced.

**Cultural influence:** In the Japanese culture, it's important to remember and celebrate important events. So it has become a custom to celebrate anniversaries.

**Market competition:** Due to the fierce competition in the Japanese mobile game market, game developers need to hold regular events to maintain gamers' interest and loyalty.

**User Expectation:** Gamers have got so used to anniversary celebrations that they start to look forward to them and it's a chance for them to gain special rewards and content.

**Marketing strategy:** Anniversaries are a perfect chance for game operators to attract new gamers and regain old gamers.

### Benefits of anniversary celebrations

- 1. Increases gamer activity:** Through limited-time events and special rewards, inactive gamers may be attracted to the game again, which will eventually increase the general activity of gamers.
- 2. Increases revenue:** Exclusive products or services may be launched during special events, which normally would bring significant revenue growth.
- 3. Improves brand loyalty:** Giving back to gamers will make gamers more satisfied and loyal to a game, which will help maintain a stable customer base in the long run.
- 4. Word-of-mouth marketing:** Peer recommendation is very important in Japan. New gamers can be brought by words spreading on social media and oral spreading
- 5. Shows a game's growth:** Anniversary celebrations are a great opportunity to show how much a game has progressed since its release. Special events and updates can be launched to attract former gamers to the game.







## Brand collaboration: the most popular marketing mode for Japanese mobile games

“

Collaborations are a popular marketing strategy for mobile games in Japan. Through a collaboration with one or more games or brands, a game can introduce the elements of those games or brands and achieve marketing effect.

The elements may include characters, stories, and theme activities. A game can collaborate with other games, and also can collaborate with animations, films, popular cultures, and other media forms. A collaboration mainly aims at attracting people's attention and arousing their interest. It will offer particular game contents and special rewards to increase gamers' gaming time and in-game spending.

### Features of Japanese mobile games' collaborations:

- Improve gaming experience: They enrich games' contents and make them more interesting by introducing other games' contents and characters.
- Cross-industry cooperation: Collaborations with famous animations, films, and other famous works attract fans from other industries.
- Market expansion: Collaborations are an effective marketing method for increasing games' popularity and brand influence.
- Interaction between communities: Collaborations improve communication and interaction between gamer communities, increasing gamers' loyalty.

### Some popular Japanese mobile games' collaborations for the last half year



”



## Japanese Ad Creatives with Local Characteristics



### A screenful of words

Words are often used in Japanese mobile game ad creatives, and they are usually large-font, badly organized, and brightly colorful.

### “Over-exposure” filter

Japanese film and TV works have a strong style and therefore are very easy to recognize. The same is true with Japanese mobile games’ live-action ad creatives. Japanese videos are characterized by sense of depth and high contrast ratios, making them aesthetically appealing.



### Anime-style storyboards

In Japan, many game companies even publish games that are adapted from anime, film, and TV works.

For the marketing of those mobile games, many manga and anime elements are added to their ad creatives. Plus there’re many IP-based games in Japan, so manga storyboard creatives are more popular.





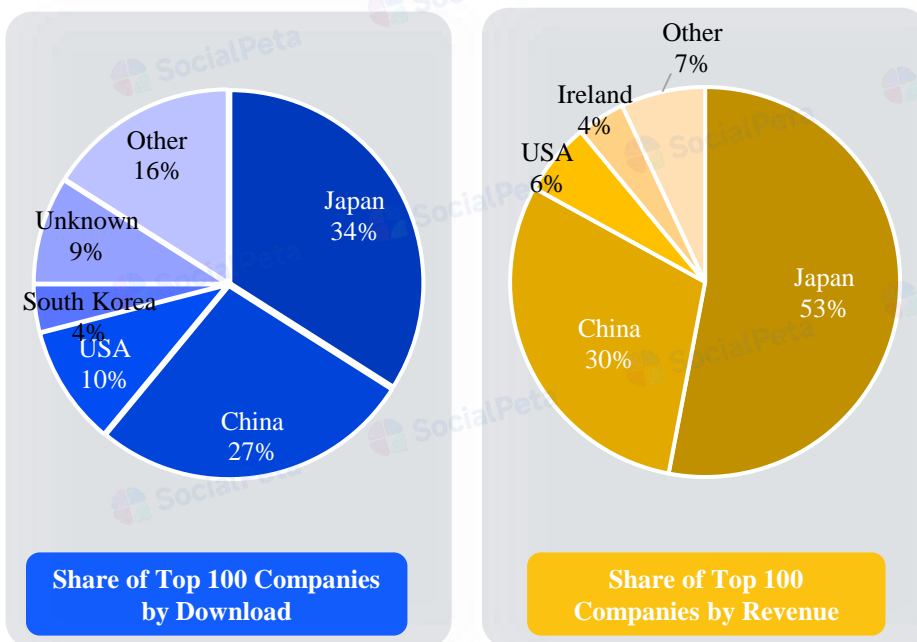


# Japanese App Store Top Lists

Japanese **local companies** have an **absolute advantage in generating revenues**. Among the top 10 games by revenue, there was only one game “Genshin Impact” that wasn’t developed by Japanese game companies.

And, Chinese companies played a significant role in the Japanese mobile games market, contributing 30% of the top 100 games by revenue.

In terms of downloads, “**Merge Watermelon - Fruit Crush**” has become a big hit game in the Japanese mobile games market for the last half year. And three similar games made it to the Top 10 by download.



## Top 10 by Download

1		呪術廻戦 ファントムパレード	Action
	Sumzap		
2		シンカゲーム - スイカ合成	Puzzle
	Universal Mobile Games		
3		東方幻想エクリプス	Action
	CAVE		
4		Royal Match	Puzzle
	Drea		
5		Monster Hunter Now	Action
	Niantic		
6		スイカゲーム - ジューシーフルーツマージ 楽しいパズル	Casual
	Abdul Rehman Al Oweis		
7		レスレリアーナのアトリエ	RPG
	KOEI TECMO		
8		リバーズ: 1999	RPG
	Bluepoch		
9		Block Blast!	Casual
	Hungry Studio		
10		スイカゲーム - ランキングチャレンジ	Casual
	Brilliant Games		

## Top 10 by Revenue

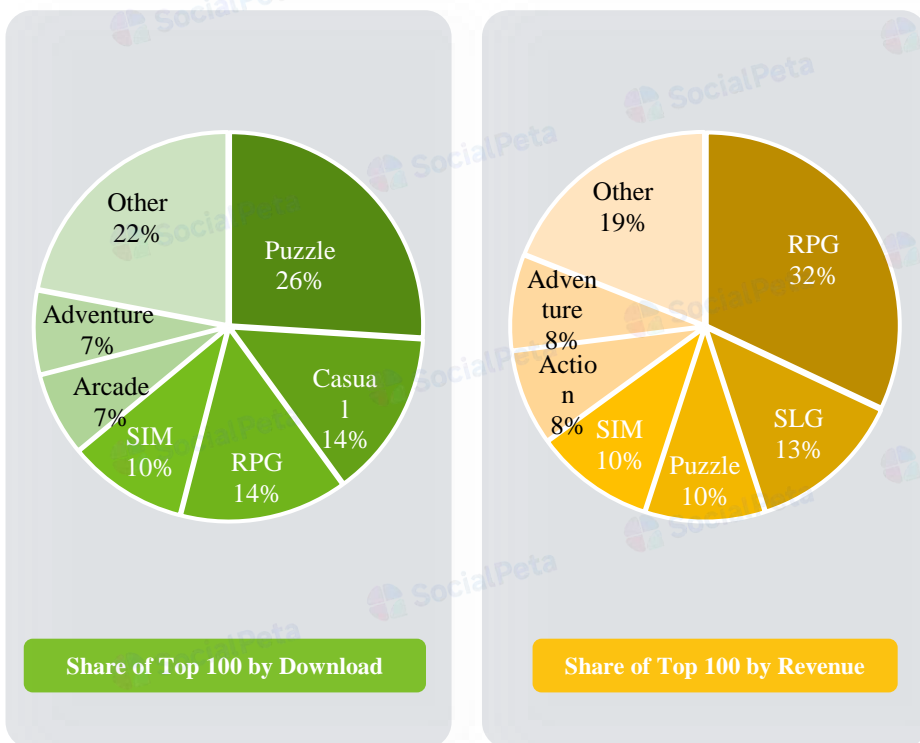
1		モンスターストライク	Action
	MIXI		
2		プロ野球スピリッツ A	Sports
	KONAMI		
3		パズル&ドラゴンズ	Puzzle
	GungHo Online Entertainment		
4		eFootball™ 2024	Sports
	KONAMI		
5		ウマ娘 プリティーダービー	Adventure
	Cygames		
6		呪術廻戦 ファントムパレード	Action
	Sumzap		
7		ドラゴンボールZ ドッカンバトル	Action
	BANDAI NAMCO		
8		Fate/Grand Order	RPG
	Aniplex		
9		Genshin Impact	Adventure
	miHoYo		
10		ドラゴンクエストウォーク	RPG
	SQUARE ENIX		

# Japanese Google Play Top Lists

Unlike the dominance of Japanese companies on the top list by revenue, there are more companies from other regions on the top list by download.

**RPG, SLG, and puzzle** games were the highest-grossing game genres in Japan. And RPG games accounted for 32% of the top 100 games by revenue.

Puzzle games contributed the most downloads in the Japanese market, which were mainly **Match-3 + X**.



Top 10 by Download				Top 10 by Revenue			
1		呪術廻戦 ファントムパレード Sumzap	RPG	1		モンスターストライク MIXI	Action
2		Royal Match Dream Games	Puzzle	2		ウマ娘 プリティーダービー Cygames	SIM
3		スイカゲーム - Suika Game Brilliant Games	Casual	3		Fate/Grand Order Aniplex	RPG
4		東方幻想エクリプス CAVE	Action	4		Genshin Impact miHoYo	Adventure
5		レスレリアーナのアトリエ KOEI TECMO	RPG	5		ドラゴンクエストウォーク SQUARE ENIX	RPG
6		Monster Hunter Now Niantic	Action	6		勝利の女神: NIKKE Tencent	RPG
7		Fate/Grand Order Aniplex	RPG	7		ブルーアーカイブ Yostar	RPG
8		Block Blast! Hungry Studio	Casual	8		崩壊: スターレイル miHoYo	Adventure
9		シンカゲーム - スイカ合成 Universal Mobile Games	Casual	9		パズル&ドラゴンズ GungHo Online Entertainment	Puzzle
10		ドット勇者 Efun Company	Card	10		パズル&サバイバル 37Games	SLG





03

# Hit Mobile Games in Japanese Market



# Instant games dominated the Japanese Market

After its success in December last year and February, respectively in China's Hong Kong, Macao, and Taiwan, 4399's instant game [キノコ伝説] entered the Japanese and South Korean markets.

## キノコ伝説

Instant game going global in Japan 4399

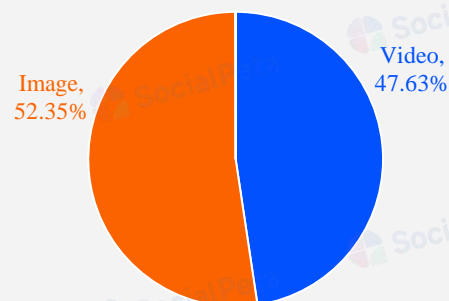
### Advertising Data

First advertising date: 18 Jan., 2024

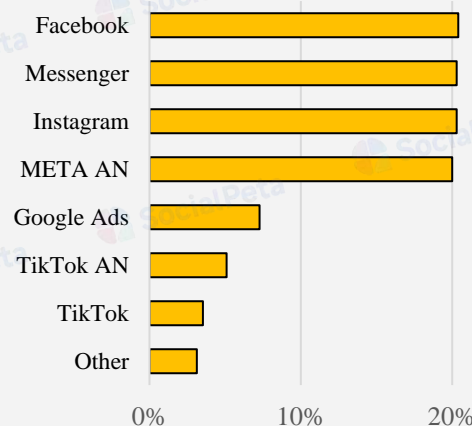
Total deduplicated creatives: 8.3K



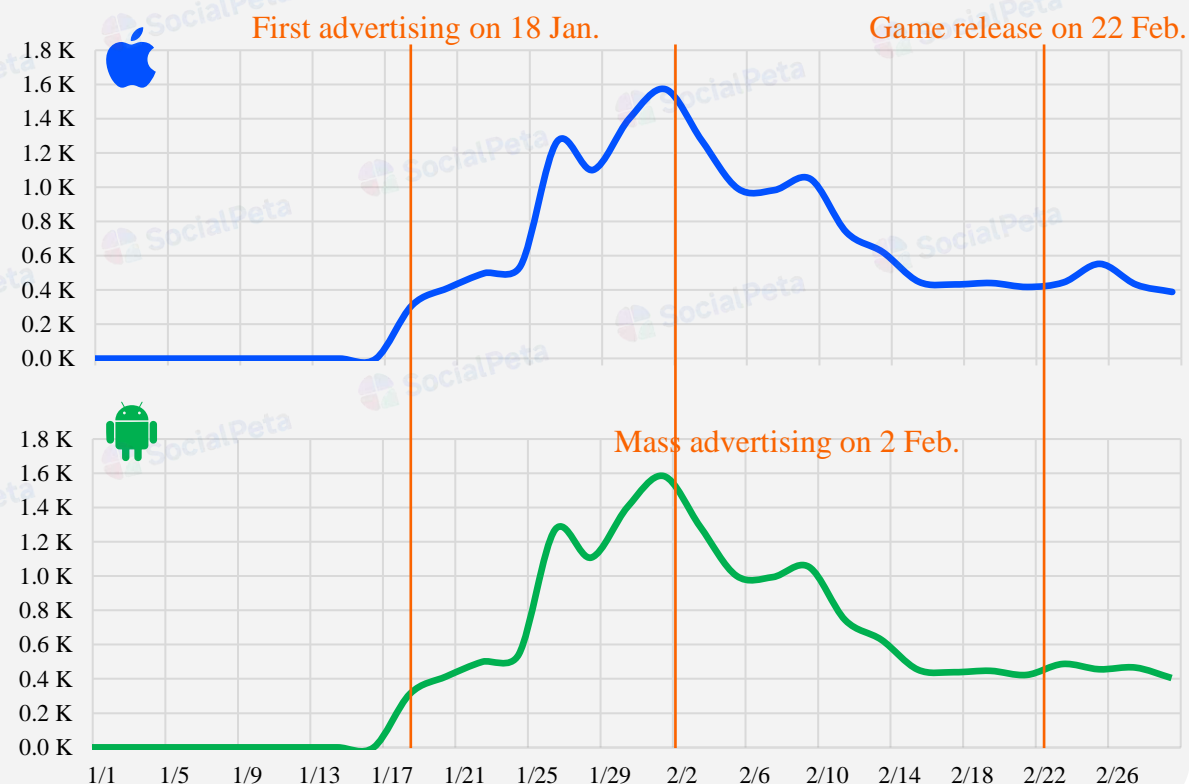
### % of creatives by type



### Top Advertising Platforms



## The Game advertiser's creatives released for iOS and Android







## [キノコ伝説] Active High-Quality Video Creatives



Advertised on:  **YouTube**

Estimated Impressions: 1.2M

Features: In order to attract Japanese players, the **Japanese gravure idol [Umi Shinonome]** was signed for the game's publicity. Meanwhile, it mentioned the in-kind rewards (PS5 and Switch) for preregistration. The creative precisely targets at Japanese Otaku men.

**20 Feb.**

**Release Date**

**5.4K**

**Estimated  
Conversions**



Click to play the  
complete creative

## [キノコ伝説] Active Image Creatives



### Nostalgic Login Interface

Gaming industry is very mature in Japan, especially Japanese RPGs which have more profound effects. Therefore, such an image creative can attract players.



### Display of Upgrade Essentials

It shows how easy it is to upgrade and change classes. Please note that such a creative is very likely made with AI.



### 3000 Draws Rewards

Consecutive draw rewards have become a must for the advertising of many RPGs. Multiple classes indicate a rich gameplay.



## How a local classic IP win over Japanese players

[圣斗士星矢：正义传说] was a success in China's Hong Kong, Macao, and Taiwan and also South America in 2023. Now it's returned to its homeland Japan.

### 聖闘士星矢レジェンドオブジャスティス

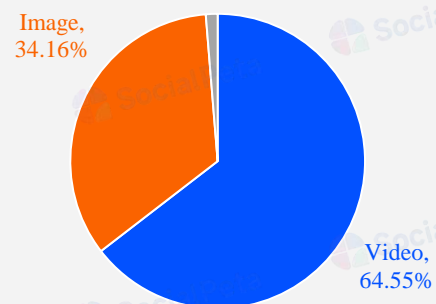
**Classic IP-based RPG** Wanda Cinemas Games  
**Advertising Data**

First advertising date: 30 Nov., 2023

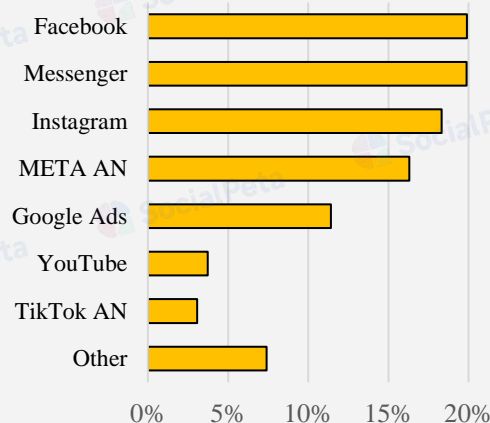
Total deduplicated creatives: 7.0K



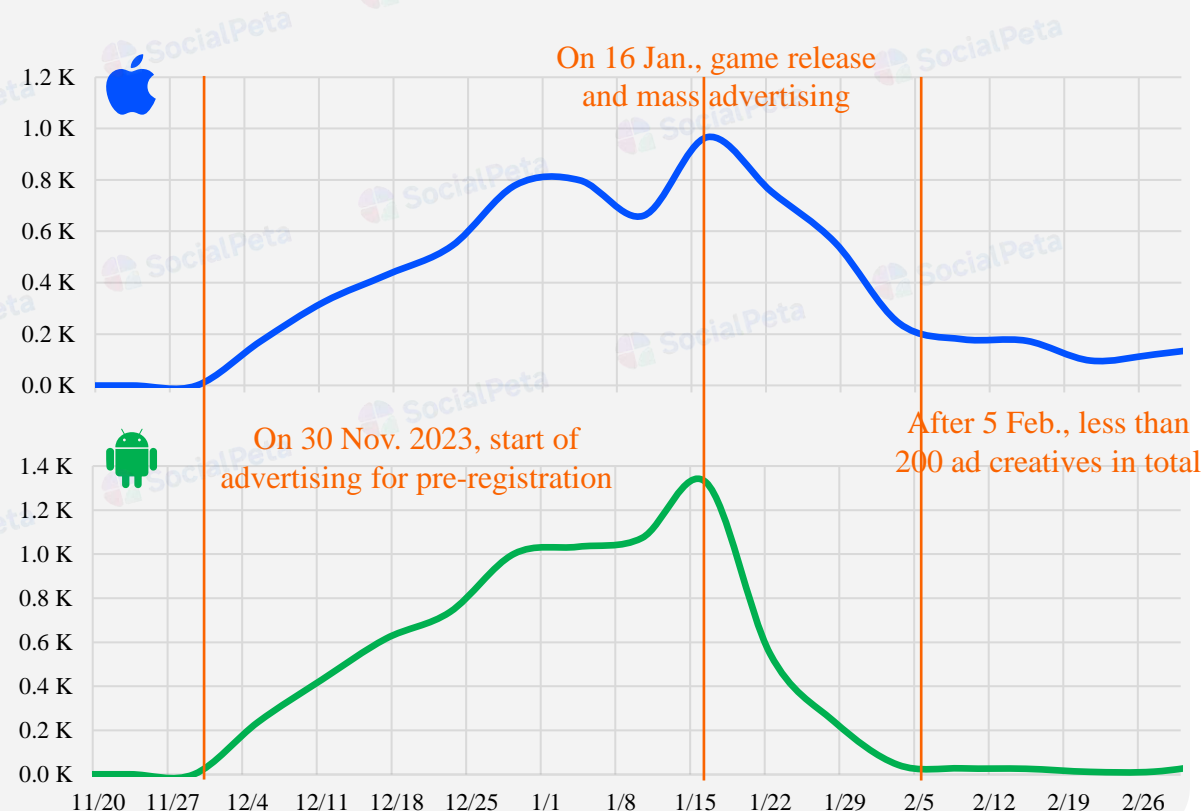
#### % of creatives by type



#### Top Advertising Platforms



#### The Game advertiser's creatives released for iOS and Android







## [聖闘士星矢レジェンドオブジャスティス] Active HQ Video Creatives



Advertised on: **facebook**

Estimated Impressions: 346.9K

Features: The creative starts with **content from the original manga**, trying to use the manga to attract players. It's followed by in-game scenes of a battle between characters, which is more attractive to fans of the original manga.

**Jan. 20**

**First Release Date**

**39 Days**

**Duration**



Click to play the complete creative



# [聖闘士星矢レジェンドオブジャスティス]Active Image Creatives



## Display of Character Cards

Cards designs are very important to card RPGs, and can be used to attract more gamers.



## Endorser Advertising

The Japanese comedian [Eiko Kano] was signed to advertise the game, which was a way to attract attention through celebrity effects.



## Guides for Beginners

Some guides may help beginners understand the game and make the game less difficult for them to play through.



# How Veteran Developers Market Their Games in Japan

[おねがい社長！] has been running for over 3 years and remained on the top 10 chart of Japanese best-selling simulation games.

## おねがい社長！

Business simulation EWORLD

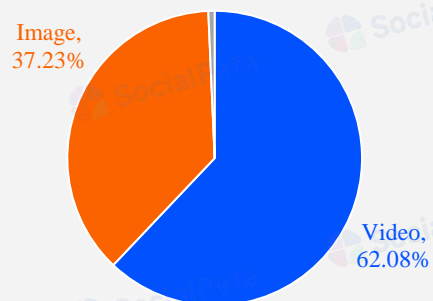
### Advertising Data

First advertising date: June 2020

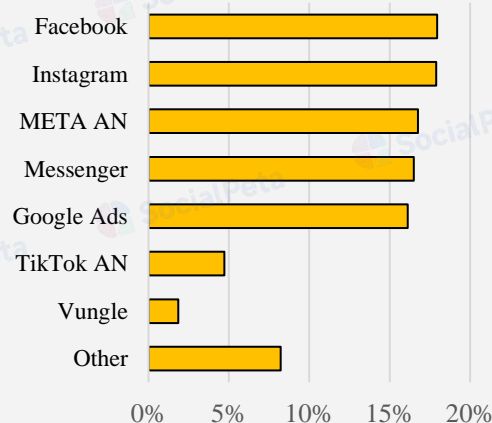
Total deduplicated creatives: 42.4K



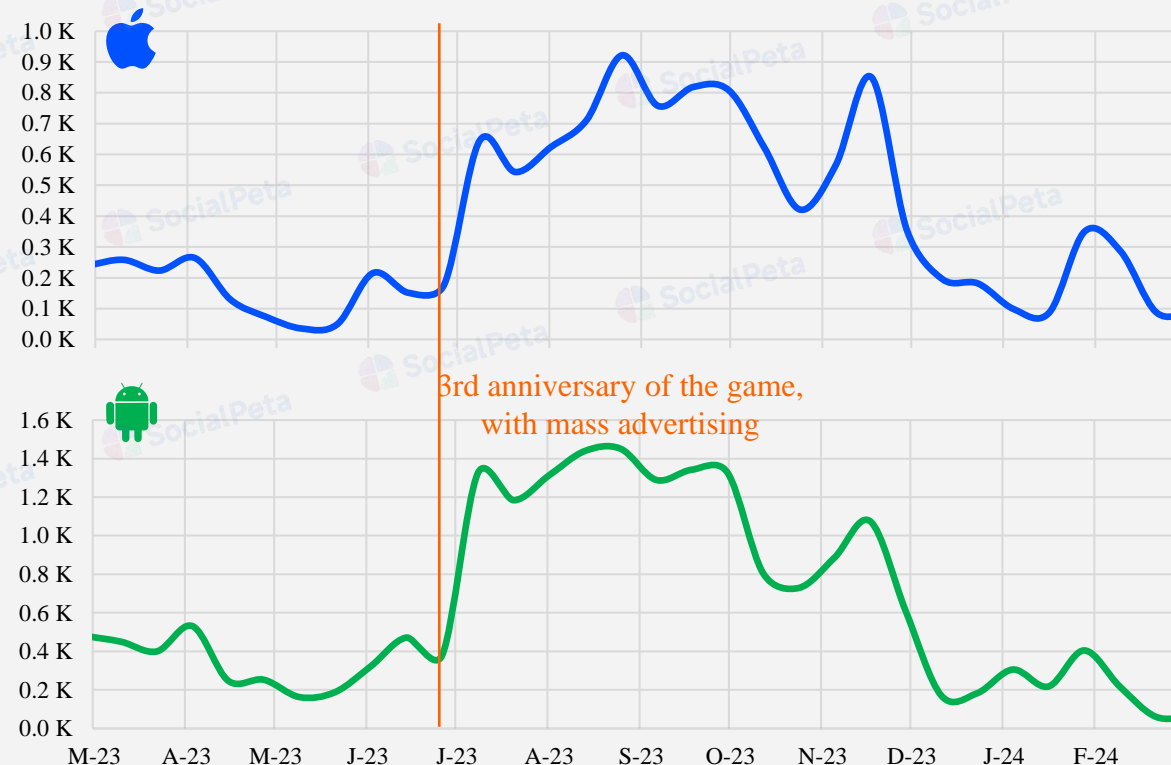
### % of creatives by type



### Top Advertising Platforms



## The Game advertiser's creatives released for iOS and Android





## [おねがい社長! ] Active High-Quality Video Creatives



Advertised on:  YouTube

Estimated Impressions: 598.1K

Features: It's a mini-game creative, a common marketing strategy recently. But with a beauty model combined with the puzzle blocks, the ad creative is suspicious to be **sexy and flirting**, which attracts more attention.

**25 Oct., 2023**

**Release Date**

**3.2K**

**Likes**



Click to play  
the complete  
creative





## [おねがい社長! ] Active Image Creatives



### AI Beautiful Girls

Advertisers make full use of AIGC tools in marketing, meanwhile the poster has copied Japanese magazine's style as much as possible.



### Celebrity Endorsement

For its 3.5 anniversary, a female celebrity Kijima Asukahas is invited to endorse and promote the game.



### Collaborations

Collaborations and endorsement can help the game quickly acquire users, but should pay attention to the overlap between partners and the game's audience.



# 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 70 countries and regions worldwide, and have captured a total of over 1.4 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 - Dec 2023

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

## 3. Copyright Notice

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## 4. Disclaimer

The industry data and market forecasts presented in this report are based on the data captured by SocialPeta Data Team and estimated by using a statistical forecasting model combined with research methods such as desk study and industry interviews. Limited by the research methods and data resources, this report can only be used as reference material. Our company shall have no liability for any data or points of view in this report. SocialPeta shall hold no responsibility for any legal consequences resulting from any action taken by any organization or individual by using or based on the above data information, and the organization or individual shall take full responsibility for any disputes or legal liabilities arising therefrom.

## 5. Concerned Countries and Regions (based on the distribution area of SocialPeta's products, not the actual geographical distribution)

**North America:** USA, Canada, Mexico, Panama

**Europe:** Turkey, France, Germany, United Kingdom, Italy, Spain, Netherlands, Norway, Poland, Portugal, Belgium, Switzerland, Austria, Romania, Sweden, Greece, Denmark, Luxembourg, Ireland, Finland

**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

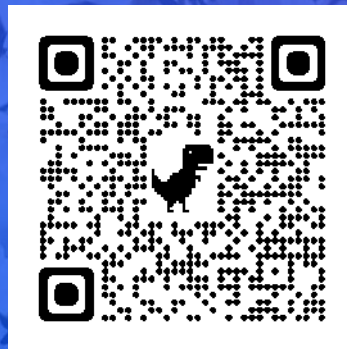
**Middle East:** Bahrain, Qatar, Saudi Arabia, UAE, Azerbaijan, Lebanon, Kuwait, Israel, Oman, Iraq, Morocco

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

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

# THANKS

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