



# H1 2022 GLOBAL MOBILE GAME

WHITE PAPER ON  
ADVERTISING & MARKETING

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# Preface

What happened in the mobile game industry in the first half of 2022? As an answer to that, SocialPeta published its “H1 2022 Mobile Game Marketing White Paper”, providing global insights for you to enter global markets with your products. According to the global data captured and integrated by SocialPeta, 2022 saw the following trends in the mobile game market:

## I. Mobile marketing focused on quality, leading to a drop in total ads. But T2 and T3 markets experienced a significant increase:

H1 2022 saw a decline of 2% YoY in the number of advertisers and a decline of 27.83% in total creatives; but there were increases of over 10% YoY in advertisers in Middle East, South America, South Asia, and other emerging markets.

## II. Metaverse drove several technical innovations:

The idea of metaverse had been a hot topic ever since it was first introduced. As the metaverse hype started to settle down, the market attitude became more rational. The effort to realize the real metaverse also brought the innovation of the related technologies. Tencent bought Black Shark Corporation this year, and transitioned its entire business from game phones to VR headsets, utilizing it for laying a foundation for metaverse. Recently CMGE also launched Youyu Art, a distribution platform for digital artwork copyright. Overall, metaverse has developed from virtual fantasy to firm reality.

## III. As the COVID-19 pandemic continued, social games were going to boom:

The pandemic that broke out in 2019 has changed the lives of people across the globe. The unpredictable variants and lockdowns have deepened the anxiety of people, resulting in their increased demand for online social services. Some social activities that were very popular offline have been brought online, such as murder mystery games and social deduction games. The mobile version of [Among Us!] has been very popular among gamers ever since its release, with over 52 million downloads in the past half year. In the post-pandemic era, a boom of social games with simple gameplays may come again.

## IV. With high-budget/high-quality mobile games in general, cross-platform play became the new growth point:

More and more gamers have known the charm of high-quality games through live streams and short videos, resulting in a rising overall expectation for games and a surging demand for high-quality game contents. [Genshin Impact]'s success has proved the profitability of cross-platform games. With the technological innovation of cloud games and third-party game engines, cross-platform games may be the mainstream in the future.

## V. The booming E-sports market boosted the global cultural exchange:

According to the data released by Newzoo, the global game live-streaming audience has been growing at an annual growth rate of about 10% since 2020. In addition to China, USA, Europe, South Korea and other mature esports regions, esports has been growing in popularity in Southeast Asia and India. There were 8 large-scale and 10 small-scale esports projects in the Southeast Asian Games hosted in Vietnam in May 2022. With the technological innovation as a result of metaverse, the esports market has become intensely competitive.

The global mobile game market is ever-changing. So game companies need to pay constant attention to both the overall market trends and the marketing trends of top products of industrial segments.

# About “SocialPeta”

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.

## Get Inspiration

### From 1.2 Billion Ad Creatives

SocialPeta covers 72 countries and regions, and over 90 well-known ad channels worldwide, such as Unity, Twitter, YouTube, Facebook and TikTok. We provide nearly 1 billion ad creatives, updating millions each day.

SocialPeta is the best source of inspiration for ads.

Category						<a href="#">All</a>	<a href="#">MultiSelect</a>	
Role-Playing	Strategy	Casino	Puzzle	Action	Card			
Simulation	Arcade	Adventure	Sports	Board	Racing			
Casual	Word	Music	Educational	Family				

Network																	
<b>Recommend</b> <a href="#">Facebook Ads</a> <a href="#">Google Ads</a>																	
<b>Global Networks</b>		<a href="#"></a> Instagram	<a href="#"></a> Audience Network	<a href="#"></a> Messenger	<a href="#"></a> Google Ads(Admob)												
<a href="#"></a> FB News Feed	<a href="#"></a> YouTube	<a href="#"></a> AdColony	<a href="#"></a> reddit	<a href="#"></a> Chartboost	<a href="#"></a> TikTok	<a href="#"></a> MoPub	<a href="#"></a> UnityAds	<a href="#"></a> Pinterest	<a href="#"></a> TopBuzz	<a href="#"></a> Tapjoy	<a href="#"></a> Vungle	<a href="#"></a> IronSource	<a href="#"></a> Mintegral (Mobvis...)	<a href="#"></a> AdSense <small>NEW</small>	<a href="#"></a> AppLovin	<a href="#"></a> Yahoo!	<a href="#"></a> Pangle(TikTok Aud...)
<b>Korea Networks</b>		<a href="#"></a> NAVER(네이버)	<a href="#"></a> Daum(다음)	<a href="#"></a> Nate(네이트)													
<b>Japan Networks</b>		<a href="#"></a> Ameba(アメーバ)	<a href="#"></a> Yahoo! Japan	<a href="#"></a> Gunosy(グノシー)	<a href="#"></a> Zucks												
		<a href="#"></a> i-mobile	<a href="#"></a> AkaNe	<a href="#"></a> Nend	<a href="#"></a> AMoAd												
<a href="#">SmartNews(スマートニュー...)</a>																	

# 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 games. 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 1.2 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.

## 1. Data Cycle and Indicators

Overall date range of the report: Jan-Jun 2022

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

## 1. Copyright Notice

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## 1. 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 Regions

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

**JP & ROK:** Japan, South Korea

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

**South Asia:** India, Pakistan

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

**CIS:** Russian Federation, Ukraine

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

**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

**Oceania:** Australia, New Zealand

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

# Insights into Global Mobile App Marketing

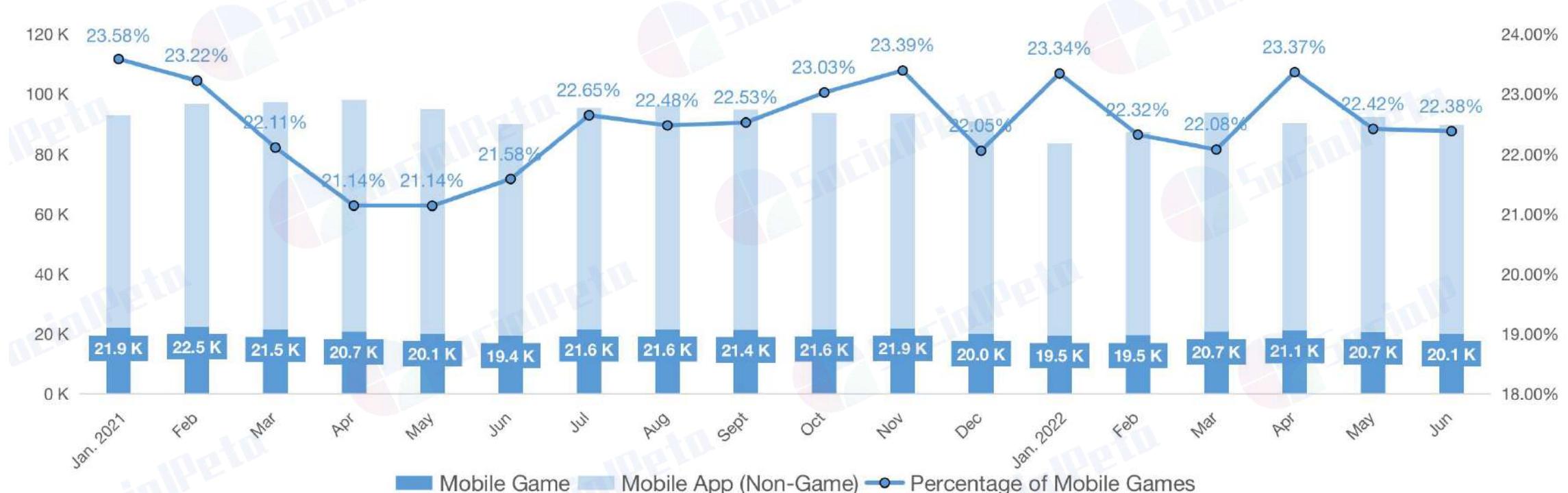


## 2022 saw a YoY decline of 5.79% in the number of mobile advertisers

The overall marketing of global mobile apps has been impacted by the continuous COVID-19 pandemic and the increasingly complicated global environment. Especially in January this year, the total number of global mobile app advertisers dropped to an all-time low of 83,400. Mobile game advertisers accounted for about 22.65% in 2022.

### 2022 Mobile Apps (Game & Non-Game)

Monthly Advertisers: 89.5K

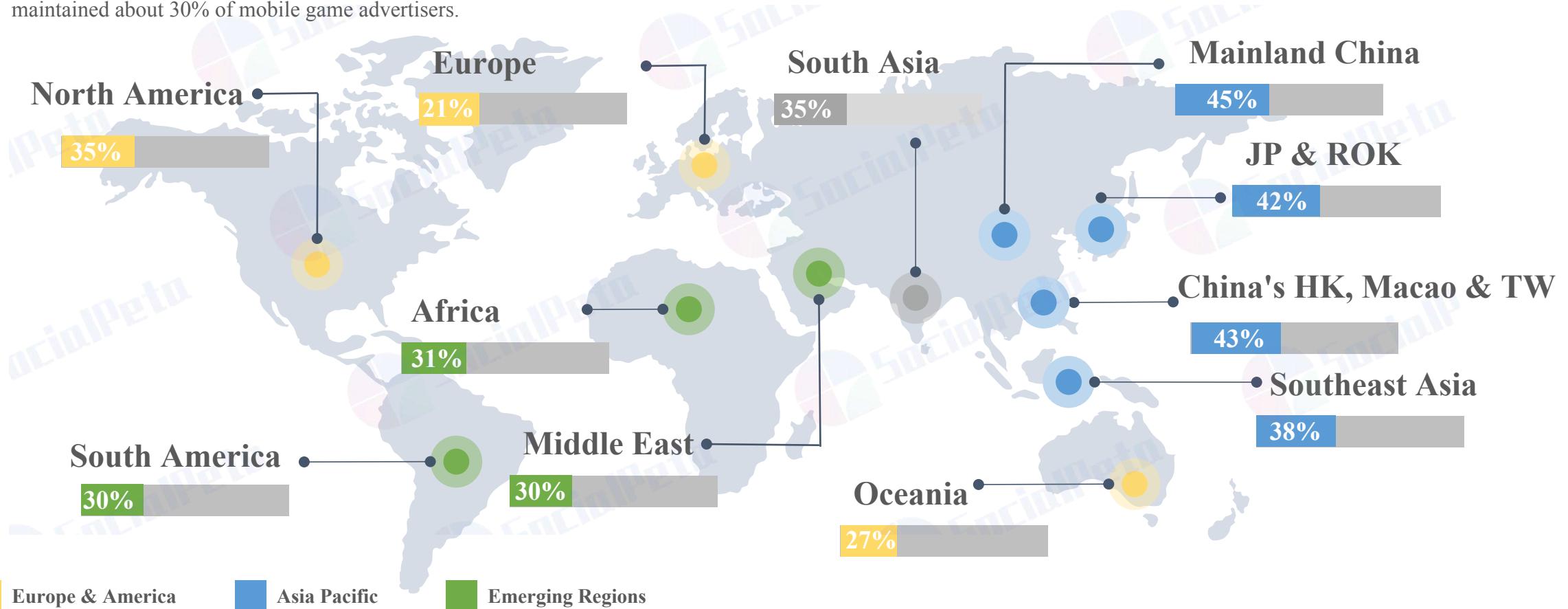


# Insights into Mobile App Marketing in Different Regions



**Asia Pacific** had the highest percentage of mobile game advertisers.

Mainland China had the highest percentage (45%) of mobile game advertisers, Europe had the lowest percentage of mobile game advertisers, and emerging markets maintained about 30% of mobile game advertisers.



The dark-colored part represents the percentage of mobile game advertisers in the region.

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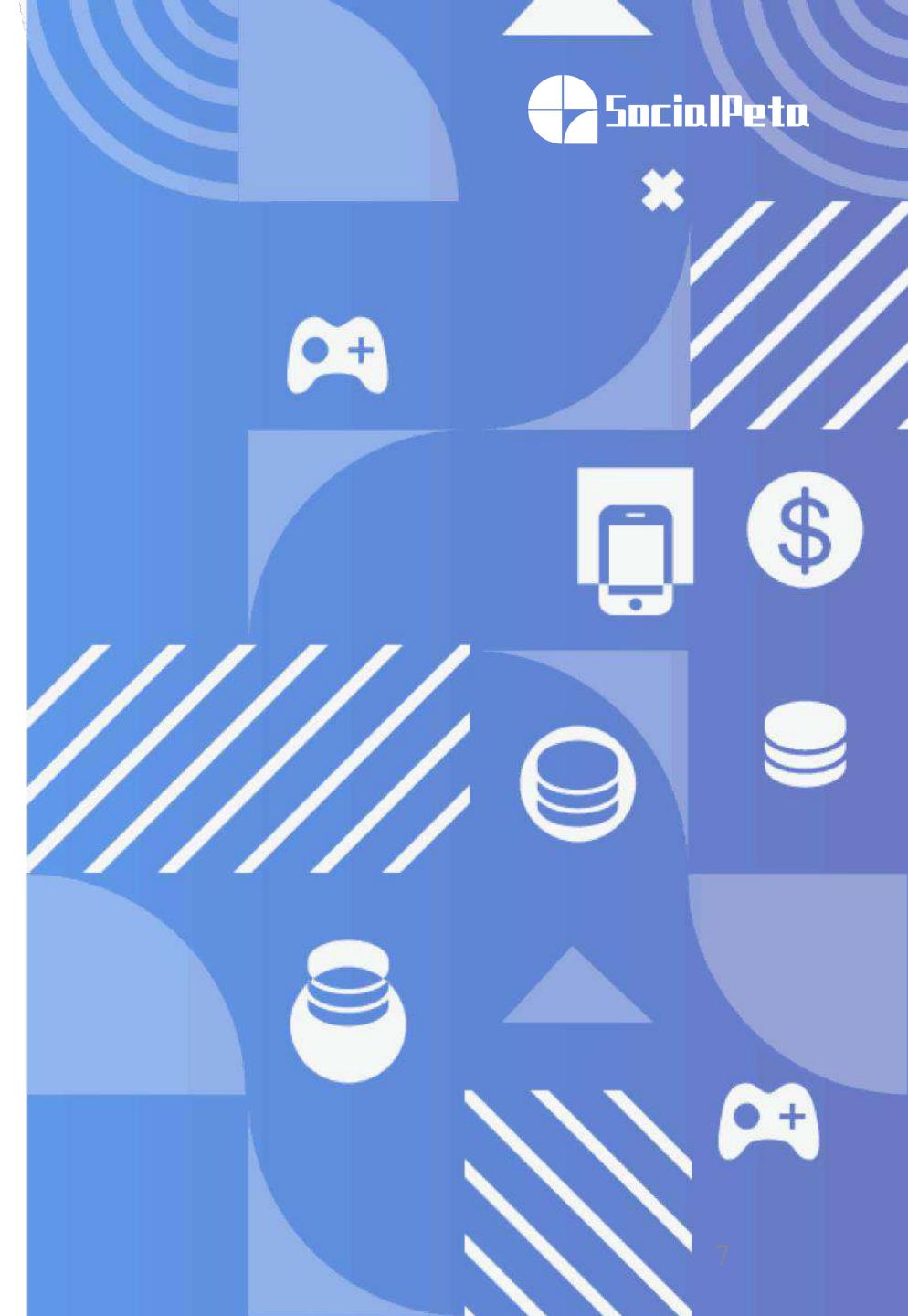
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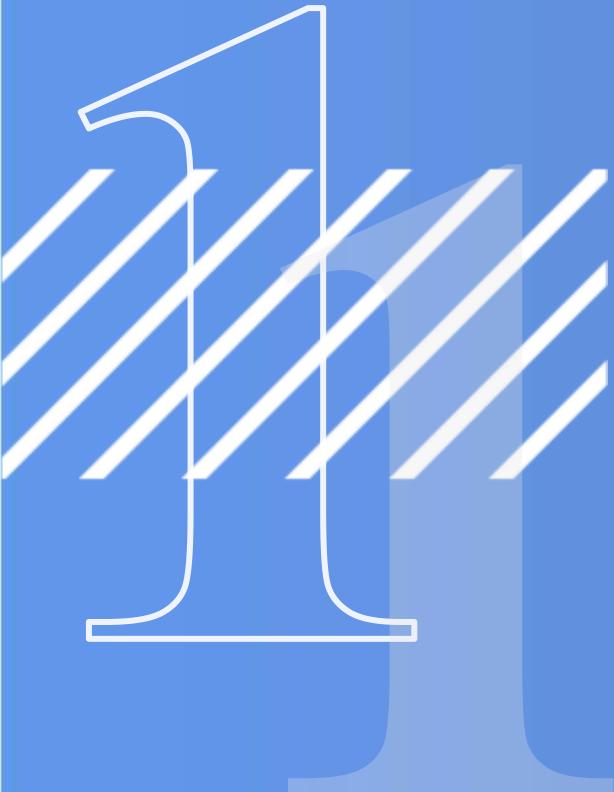
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# Insights into Global Mobile Game Marketing

# Insights into Global Mobile Game Marketing

## H1 2022 saw a YoY decline of 27.83% in mobile game creatives

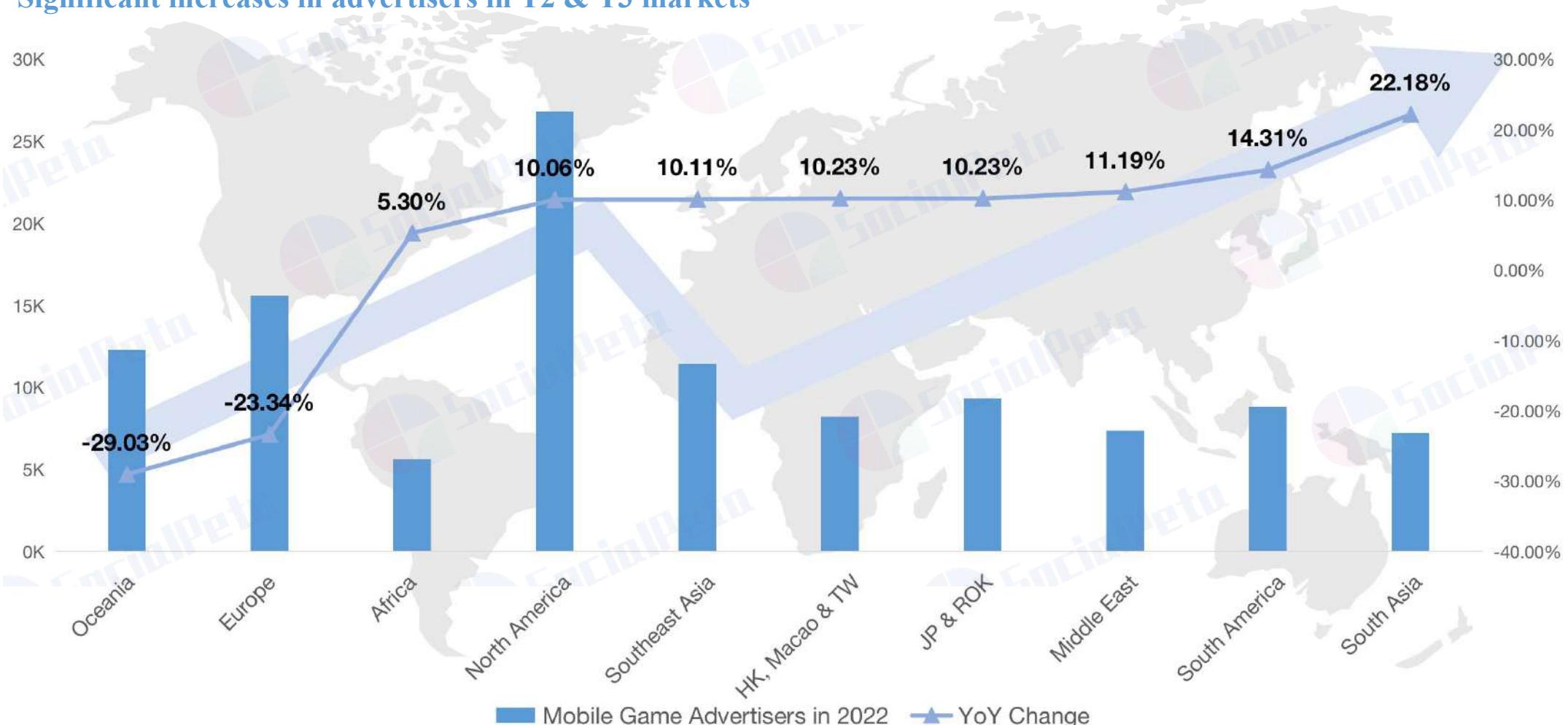
**2022 saw a sharp drop in mobile game advertising.** There were 45,100 advertisers in H1 2022, not much change compared to the same period last year. But the total mobile game creatives were 15.8 million, representing a YoY decline of nearly 30%.

There were 10.8 million creatives in Q1 2022, down 22.83% YoY; and 9.8 million creatives in Q2, down 38.43% YoY.



# Insights into Global Mobile Game Marketing

**Significant increases in advertisers in T2 & T3 markets**



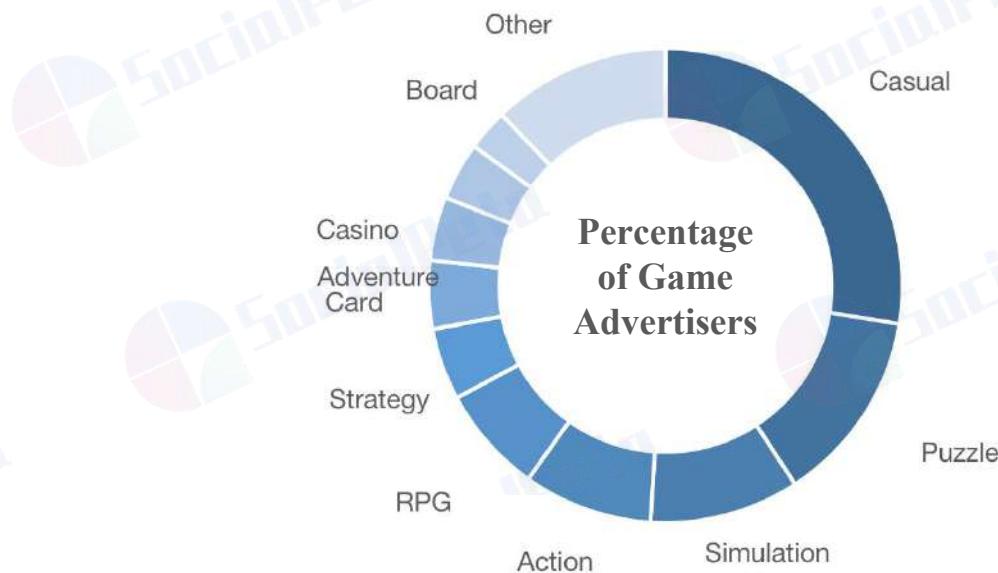
# Percentage of Advertisers by Game Genre

Genre	Percentage of All Genres	YoY Change
Casual	26.03%	+4.70%
Puzzle	12.47%	+0.82%
Simulation	9.64%	+1.19%
Action	8.31%	-0.14%
RPG	6.91%	-2.51%
Strategy	4.63%	-0.57%
Card	4.39%	+0.12%
Casino	4.11%	+0.78%
Adventure	3.73%	-0.42%
Board	2.66%	-0.07%

## Top 3 Game Genres by Number of Advertisers Casual, Puzzle, Simulation

There was a significantly increased percentage of casual game advertisers, accounting for 26.03% of the total advertisers, up 4.7% YoY.

There was a dramatically reduced percentage of RPG advertisers. RPGs had been the third games during the same period last year by the number of advertisers, and were ranked below simulation and action games this year.

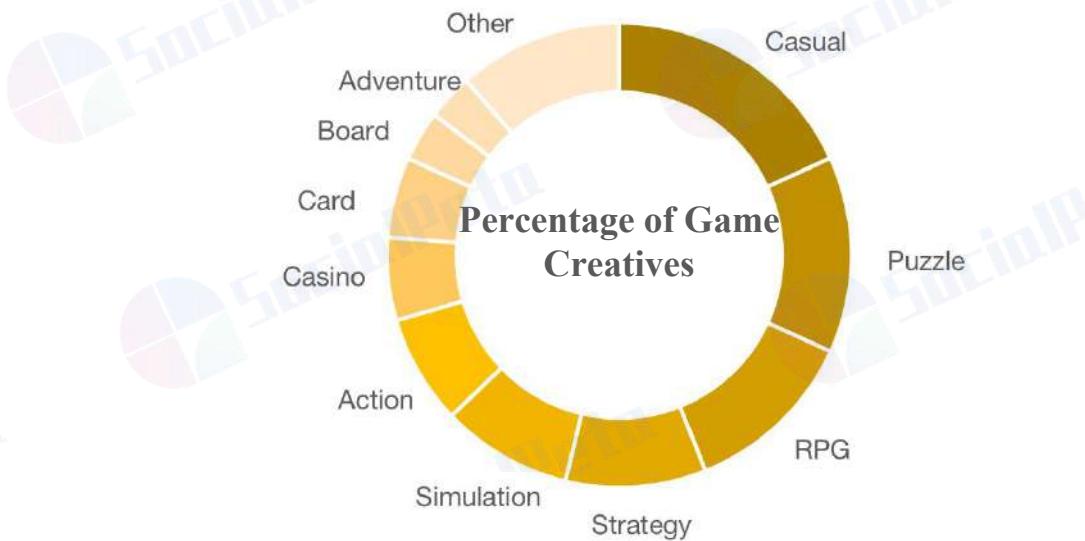


# Percentage of Creatives by Game Genre

Genre	Percentage of All Genres	YoY Change
Casual	18.14%	+1.07%
Puzzle	13.67%	+0.74%
RPG	12.14%	-1.50%
Strategy	9.78%	+0.21%
Simulation	9.12%	-0.52%
Action	7.61%	+0.13%
Casino	5.76%	-0.40%
Card	5.62%	+0.13%
Board	3.49%	+0.19%
Adventure	3.20%	-0.30%

## Top 3 Game Genres by Number of Creatives Casual, Puzzle, RPG

Because of the huge number of casual game advertisers, casual game creatives accounted for the highest percentage of 18.14%, up 1.07% YoY. Puzzle game creatives accounted for the second-highest percentage, up 0.74% YoY. RPG game creatives accounted for 12.14%, representing the sharpest drop of 1.5% YoY, falling 1 spot in the rankings.



# Insights into Game Marketing by Game Genre

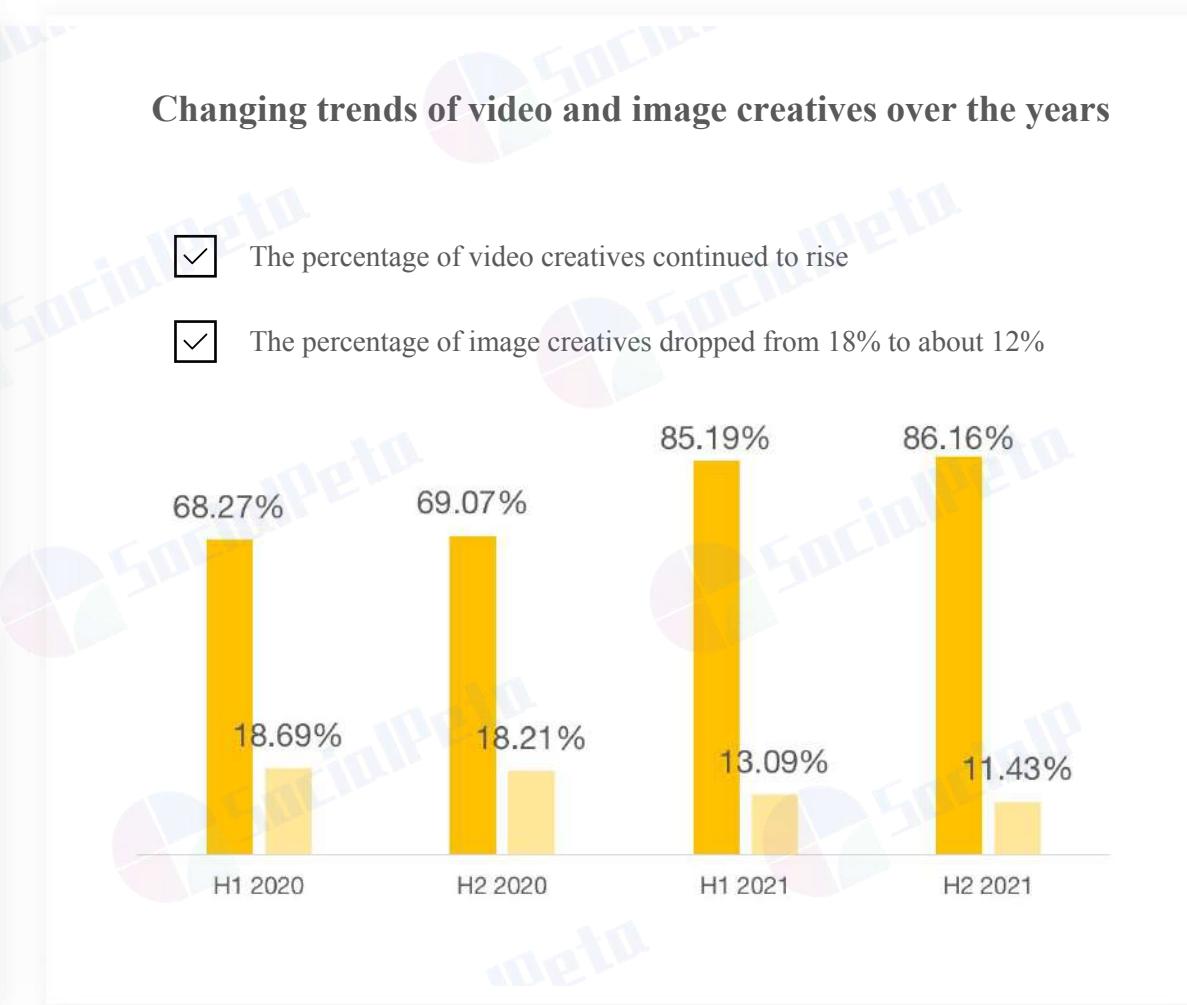
**In 2022, mobile game advertisers per month: 20.4K; monthly creatives per advertiser: 308**

Among all mobile games, [casual games](#) had the most monthly advertisers. According to SocialPeta, there were over 6300 casual game advertisers per month, followed by puzzle game and simulation game advertisers.

[Strategy games](#) had 555 monthly creatives, the most among all games' monthly creatives, mainly contributed by SLG games, one type of strategy games.



# Percentage of Creatives by Game Genre

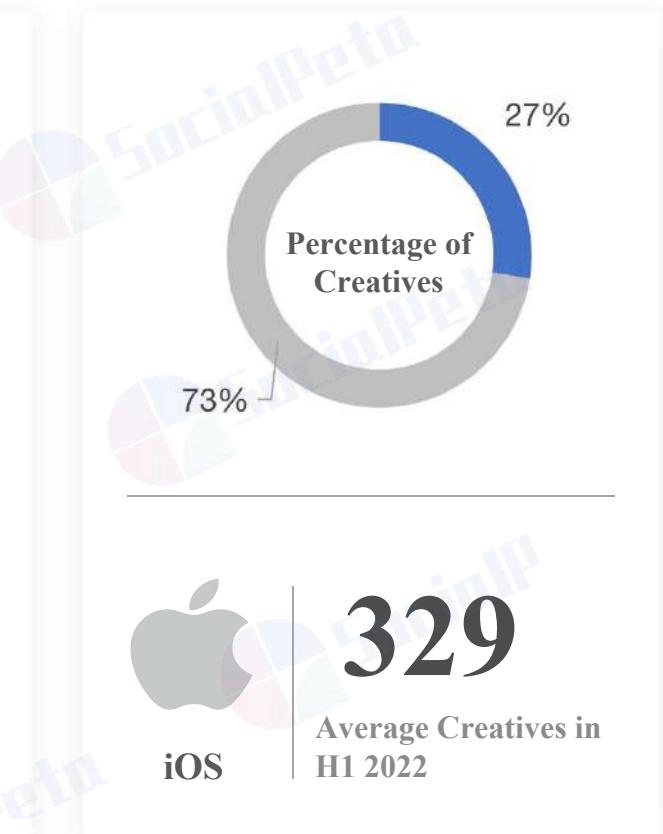
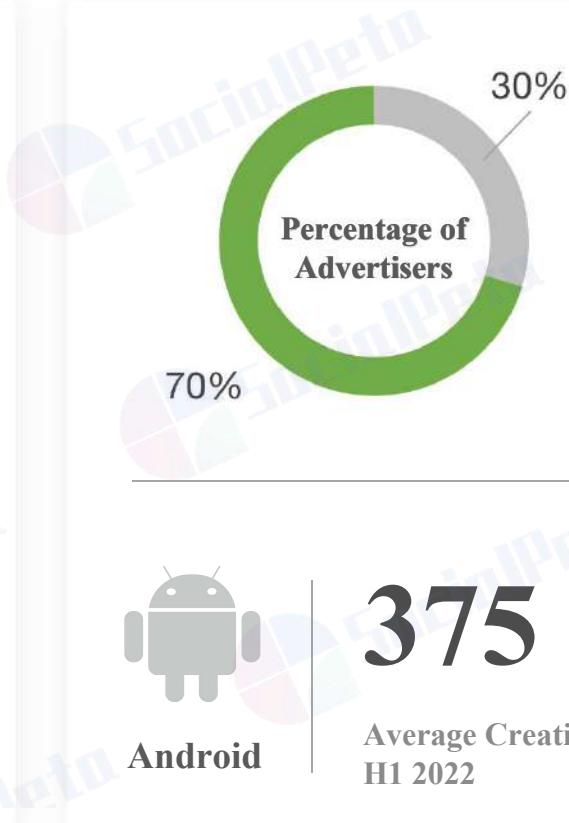
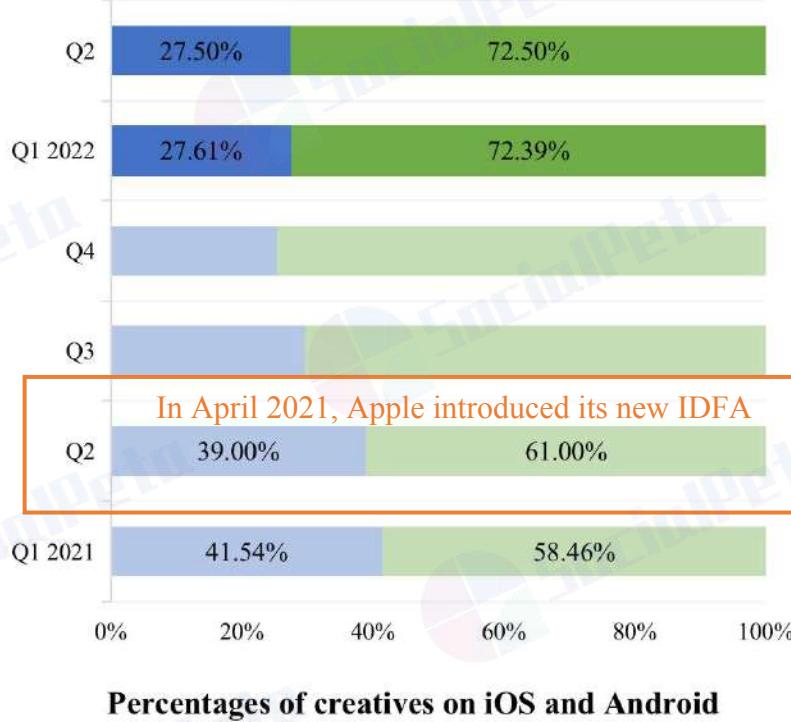


# Mobile Games Advertising Insights on iOS & Android



## Android had about 70% mobile game advertisers and creatives

Apple's new IDFA forced more and more companies to focus their advertising on Android, as a result of which, average creatives per advertiser on Android were 14% more than that on iOS.



# Top Mobile Games on the App Store in H1 2022



## ⬇️ Download Chart

1	Subway Surfers	Action
2	Roblox	Adventure
3	Coloring Match	Casual
4	Wordle!	Word
5	Fishdom	Puzzle
6	Count Masters	Casual
7	8 Ball Pool™	Sports
8	Fill The Fridge!	Casual
9	Magic Tiles 3	Music
10	Among Us!	Action

11	Candy Crush Saga	Puzzle
12	Clash Royale	Strategy
13	Stumble Guys	Action
14	Bridge Race	Casual
15	Going Balls	Casual
16	Call of Duty®: Mobile	Action
17	PUBG MOBILE	Action
18	Homescapes	Puzzle
19	Project Makeover	Puzzle
20	Garena Free Fire	Action

## 💲 Revenue Chart

1	Roblox	Adventure
2	Candy Crush Saga	Puzzle
3	Genshin Impact	Adventure
4	Pokémons GO	RPG
5	Coin Master	Casual
6	XFLAG	RPG
7	Clash of Clans	Strategy
8	Cygames	Simulation
9	Homescapes	Puzzle
10	PUBG MOBILE	Action
11	Clash Royale	Strategy
12	Royal Match	Puzzle
13	KONAMI	Sports
14	GungHo	RPG
15	Call of Duty®: Mobile	Action
16	Gardenscapes	Puzzle
17	Garena Free Fire	Action
18	Fate/Grand Order	RPG
19	Evony	Strategy
20	State of Survival	Strategy

# Top Mobile Games by Advertising in H1 2022



IOS



1	Fishdom Playrix	Mafia City Yotta Games	Bingo Clash AviaGames	Slots GoldenHoYeah IGS	Find the Difference Lemel Labs
2	The Ants StarUnion	Resortopia DH Games	永夜星神 SpringGame	Dynasty Legends 2 Taihe Interactive	Apex Legends Mobile Electronic Arts
3	Coloring Book! Doodle Mobile	Two Dots Playdots	Kingdom Guard Tap4Fun	Evony Top Games	盛世芳華 Huoyu Game
4	State of Survival FunPlus	Purrfect Tale DH Games	Township Playrix	Mega Tower Youloft Tech	Rise of Empires IM30
5	歡樂大東家 EWORLD	Homescapes Playrix	The Soul Guardian YANG STUDIO	吞食天地3:放置版 9Splay	奇蹟MU Ourpalm
6	聖樹喚歌 新连信息	Wordle! Lion Studios	Family Farm Adventure Century Games	Pocket7Games AviaGames	聖鑰 SpringGame
7	The Grand Mafia Yotta Games	Word Trip PlaySimple Games	Rabbit Empire Yojoy Game	Legend of the Phoenix Modo Global	Idle Heroes DH Games
8	Evertale ZigZaGame	AZUREA-空 噴- Zlongame	Jackpot World™ Bole Games	Garena Free Fire GARENA	一念逍遙 Leiting Games
9	Block Puzzle Doodle Mobile	蟻族奇兵AntWars Eskyfun	Last Fortress IM30	爱琳诗篇 9377	War Robots Pixonic
10	Rise of Kingdoms Lilith Games	Animal Restaurant DH Games	Trivia Blitz Joyride Games	DK Mobile Mover Games	Hero Wars Nexters

# Top Mobile Games on Google Play in H1 2022



## Download Chart

1	<b>Subway Surfers</b>	Action
2	<b>Ludo King</b>	Board
3	<b>Garena Free Fire</b>	Action
4	<b>Candy Crush Saga</b>	Puzzle
5	<b>Merge Master</b>	Casual
6	<b>Race Master 3D</b>	Casual
7	<b>Garena Free Fire</b>	Action
8	<b>Roblox</b>	Adventure
9	<b>My Talking Tom 2</b>	Simulation
10	<b>Piano Fire</b>	Music

11	<b>My Talking Tom Friends</b>	Simulation
12	<b>8 Ball Pool™</b>	Sports
13	<b>Carrom Pool</b>	Board
14	<b>Truck Simulator</b>	Simulation
15	<b>Stumble Guys</b>	Action
16	<b>Traffic Rider</b>	Racing
17	<b>Find the Alien</b>	Casual
18	<b>DOP 4</b>	Casual
19	<b>Bridge Race</b>	Casual
20	<b>Fishdom</b>	Puzzle



## Revenue Chart

1	<b>Lineage W</b>	RPG
2	<b>Coin Master</b>	Casual
3	<b>Candy Crush Saga</b>	Puzzle
4	<b>Roblox</b>	Sandbox
5	<b>Genshin Impact</b>	Adventure
6	<b>XFLAG</b>	RPG
7	<b>Garena Free Fire</b>	Action
8	<b>M</b>	RPG
9	<b>PUBG MOBILE</b>	Action

11	<b>Gardenscapes</b>	Puzzle
12	<b>Evony</b>	Strategy
13	<b>Clash of Clans</b>	Strategy
14	<b>State of Survival</b>	Strategy
15	<b>Homescapes</b>	Puzzle
16	<b>Pokémon GO</b>	RPG
17	<b>Fishdom</b>	Puzzle
18	<b>Fate/Grand Order</b>	RPG
19	<b>Lords Mobile</b>	Strategy
20	<b>Odin: Valhalla Rising</b>	RPG

# Top Mobile Games by Advertising in H1 2022



Android

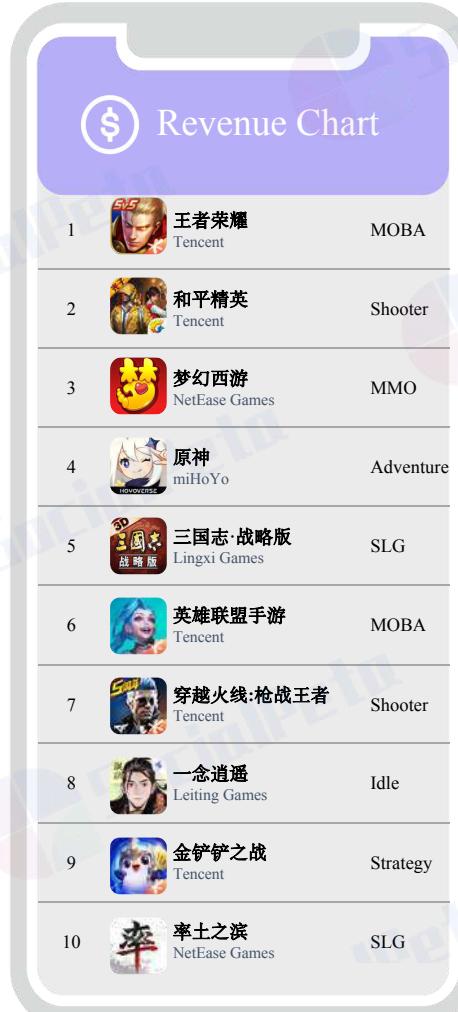
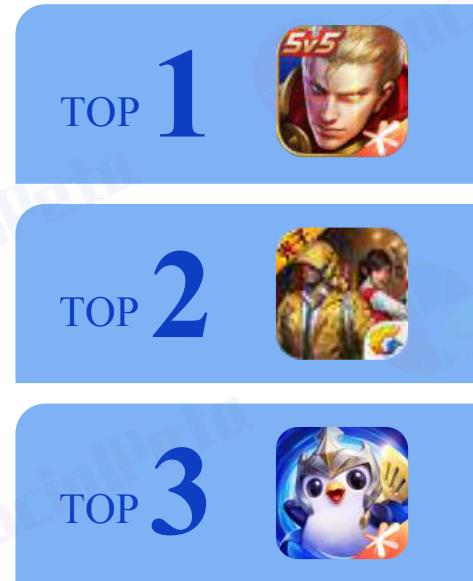


1	<b>Jackpot World™</b> Bole Games	11	<b>Cash Frenzy™</b> Bole Games	21	<b>Text or Die</b> Rolle Games	31	<b>Wood Block Puzzle</b> Learnings	41	<b>花舞宫廷</b> Origin Mood
2	<b>The Grand Mafia</b> Yotta Games	12	<b>Car Fix Tycoon</b> SONOW	22	<b>聖鑰</b> SpringGame	32	<b>Township</b> Playrix	42	<b>Solitaire</b> Learnings
3	<b>Mafia City</b> Yotta Games	13	<b>Fishdom</b> Playrix	23	<b>Sudoku</b> Learnings	33	<b>Words of Wonders</b> Fugo Games	43	<b>Paintist Plus</b> 道成网络
4	<b>Lords Mobile</b> IGG	14	<b>The Ants</b> StarUnion	24	<b>War Robots</b> Pixonic	34	<b>Money Rush</b> Rolle Games	44	<b>Coloring Book!</b> Doodle Mobile
5	<b>Coin Pet</b> ASIA YUTAI NETWORK	15	<b>Tap Color Pro</b> Century Games	25	<b>Fill The Fridge</b> Rolle Games	35	<b>Solitaire Home Design</b> Betta Games	45	<b>Coffee Stack</b> Rolle Games
6	<b>Kingdom Guard</b> Tap4Fun	16	<b>Garena Free Fire</b> GARENA	26	<b>Homescapes</b> Playrix	36	<b>Gardenscapes</b> Playrix	46	<b>Family Farm Adventure</b> Century Games
7	<b>Lotsa Slots</b> Bole Games	17	<b>Camping Tycoon</b> SONOW	27	<b>Chapters</b> Crazy Maple Studio	37	<b>State of Survival</b> FunPlus	47	<b>Hair Challenge</b> Rolle Games
8	<b>Rise of Kingdoms</b> Lilith Games	18	<b>Puzzles &amp; Survival</b> 37Games	28	<b>Coin Master</b> Moon Active	38	<b>Braindom</b> Matchingham Games	48	<b>Genshin Impact</b> miHoYo
9	<b>Evony</b> Top Games	19	<b>Last Shelter</b> IM30	29	<b>Last Fortress</b> IM30	39	<b>Yalla Ludo</b> Yalla	49	<b>Two Dots</b> Playdots
10	<b>Rise of Empires</b> IM30	20	<b>Jackpot Master™</b> Zeroo Gravity	30	<b>Braindom 2</b> Matchingham Games	40	<b>Office Fever</b> Rolle Games	50	<b>Mega Tower</b> Youloft Tech



# Insights into Mobile Game Marketing in Top Countries/Regions

# Top 10 Mobile Games in Mainland China



# Analysis of Mobile Game Advertisers in China's Mainland



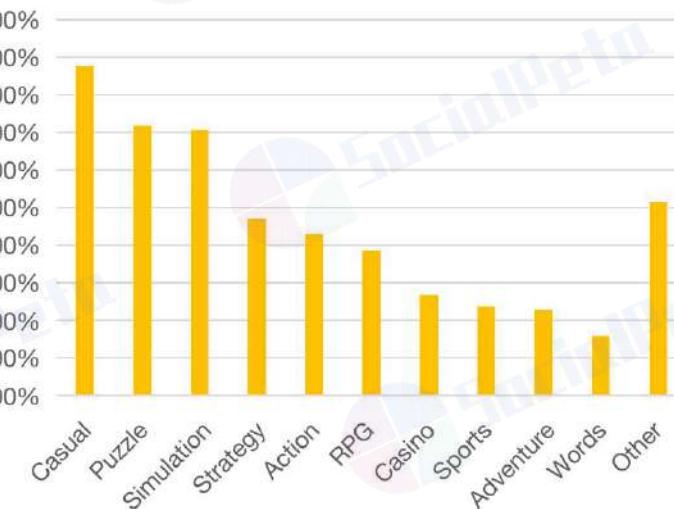
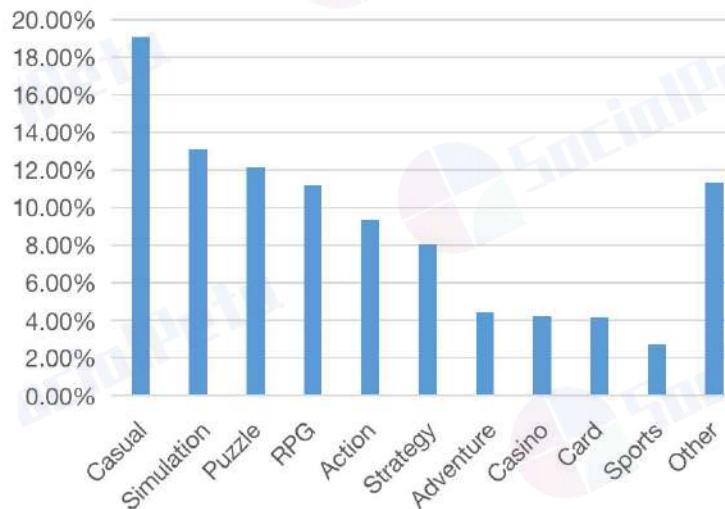
## Percentages of advertising by game genre

Simulation game advertisers accounted for as high as 13.14%; puzzle game creatives accounted for 14.39%.

From its downloads and revenue, we can see that the business simulation game [可口的披萨, 美味的披萨] has gained quite a popularity through the social media Tiktok.

Because of the unique version numbering system in China's mainland, as of June 2022, less than 200 games had achieved version numbers this year. The scarce version numbers and the long period of examination forced Chinese game companies to launch their products globally.

■ Active Advertisers ■ Active Creatives



水果对对碰 一念逍遥 捕鱼大作战

## Number of advertisers in each month

Total advertisers in H1: 6.1K; Monthly advertisers: 3.9K.



# Top 10 Mobile Games in China's HK, Macao & TW



## Download

1	Apex 英雄M 5X Games	Shooter
2	聖鑰 SpringGame	MMO
3	我當校長超勇的 Pleasing Creation Times	Simulation
4	Sausage Man XD Inc.	Shooter
5	斗羅大陸:武魂覺醒 龙悦网络	RPG
6	T3 Arena XD Inc.	Shooter
7	傀儡師: Tower Defense對決 TOUDA	Strategy
8	Last Fortress IM30	SLG
9	Date A Live Moonwalk Interactive	RPG
10	幻想名將傳 Doki Studio	Idle

## Revenue

1	秘境傳說: 神木遺跡 4399	SLG
2	聖鑰 SpringGame	MMO
3	Garena 傳說對決: GARENA	MOBA
4	Genshin Impact miHoYo	Adventure
5	W NCSOFT	MMO
6	星城Online WANIN	Slots
7	新劍俠世界3 Mover Games	MMO
8	神魔之塔 Mad Head	RPG
9	Pokémon GO Niantic	Action
10	少女迴戰 ONEMT	Idle

## Download

1	RO仙境傳說: 魔物遠征 Gravity	Idle
2	我帶兵最牛 EkiPlay	SLG
3	少女迴戰 ONEMT	Idle
4	Sausage Man XD Inc.	Shooter
5	Fish Eater.io Tap 2 Fun	Hyper-Casual
6	秘境傳說: 神木遺跡 4399	SLG
7	富甲江戶城 YOGAME	Simulation
8	Count Masters AIBY	Hyper-Casual
9	Tall Man Run Supersonic	Hyper-Casual
10	Cubes Control SayGames	Puzzle

## Revenue

1	Lineage W NCSOFT	MMO
2	天堂M Gamania	MMO
3	星城Online WANIN	Slots
4	奧丁:神叛 Kakao Games	MMO
5	絶世仙王 絕妙遊戲	MMO
6	Fate/Grand Order Aniplex	RPG
7	少女迴戰 ONEMT	Idle
8	明日方舟 HyperGryph	Tower Defense
9	Garena 傳說對決 GARENA	MOBA
10	天堂2M NCSOFT	MMO

# Analysis of Mobile Game Advertisers in China's HK, Macao & TW



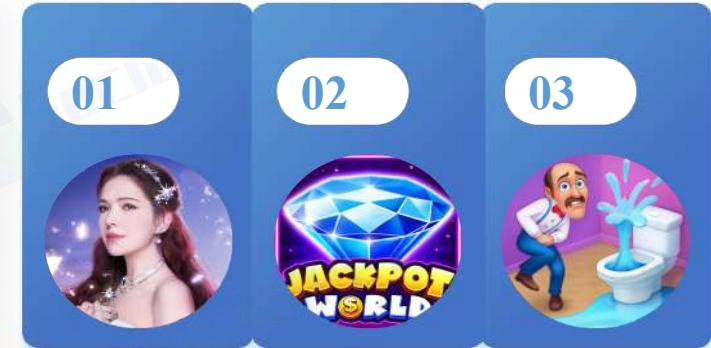
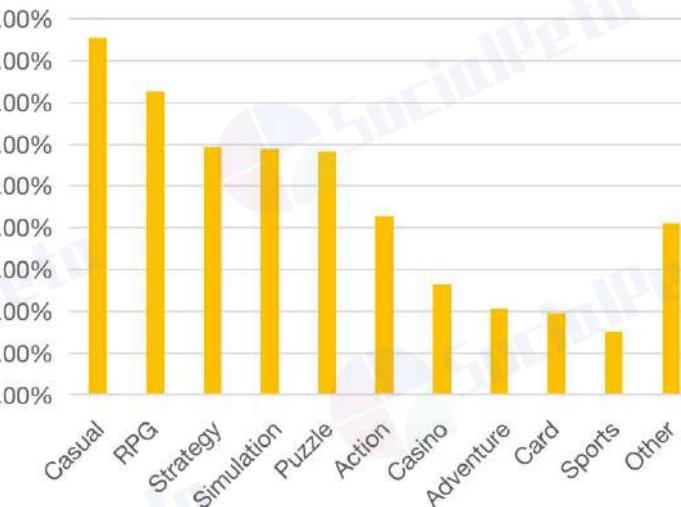
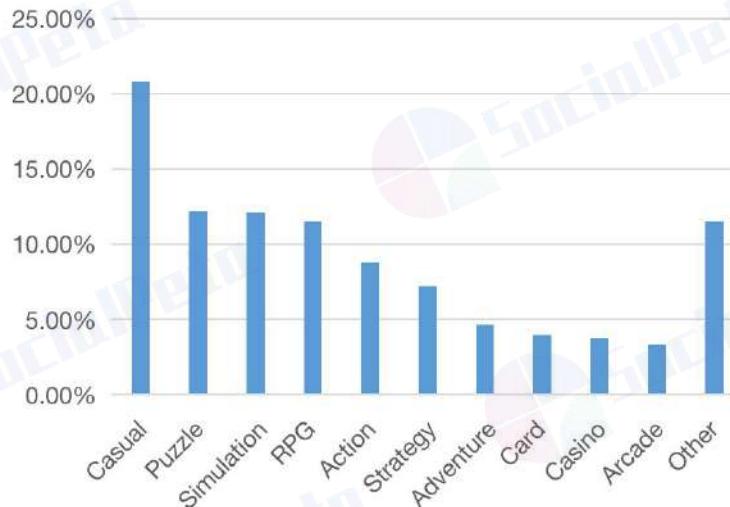
Xianxia MMO was still popular, RPG creatives contributed the highest percentage

## Percentages of advertising by game genre

Compared to 2021, 2022 saw more variety in the genres of top games by advertising in China's HK, Macao & TW regions, with most advertising strategies being a combination of big amount advertising and flexible media buying.

For the advertising creatives, endorsers who were advanced in age could more easily bring back old memories. So user segmentation was achieved through a precise definition of endorsers, which further made precise marketing possible.

■ Active Advertisers ■ Active Creatives



聖鑰 Jackpot World™ Homescapes

## Number of advertisers in each month

Total advertisers in H1: 11.6K; Monthly advertisers:



# Top 10 Mobile Games in the USA



## Download

1		<b>Subway Surfers</b>	Parkour
2		<b>Diablo Immortal</b>	ARPG
3		<b>Apex Legends Mobile</b>	Shooter
4		<b>Fill The Fridge!</b>	Hyper-Casual
5		<b>Bucket Crusher</b>	Hyper-Casual
6		<b>Roblox</b>	Sandbox
7		<b>Tall Man Run</b>	Hyper-Casual
8		<b>Stumble Guys</b>	Battle Royale
9		<b>Fishdom</b>	Match-3
10		<b>Magic Tiles 3</b>	Music



## Revenue

1		<b>Candy Crush Saga</b>	Match-3
2		<b>Roblox</b>	Sandbox
3		<b>State of Survival</b>	SLG
4		<b>Homescapes</b>	Match-3
5		<b>Pokémon GO</b>	Action
6		<b>Royal Match</b>	Match-3
7		<b>Diablo Immortal</b>	ARPG
8		<b>Clash of Clans</b>	SLG
9		<b>Evony</b>	SLG
10		<b>DoubleDown™ Casino</b>	Slots



## Download

1		<b>Apex Legends Mobile</b>	Shooter
2		<b>Subway Surfers</b>	Parkour
3		<b>Ni no Kuni</b>	MMO
4		<b>Move Animals</b>	Hyper-Casual
5		<b>Super Cloner 3D</b>	Hyper-Casual
6		<b>Bucket Crusher</b>	Hyper-Casual
7		<b>Figurine Art</b>	Hyper-Casual
8		<b>Join Numbers</b>	Hyper-Casual
9		<b>Roblox</b>	Sandbox
10		<b>Parking Jam 3D</b>	Puzzle



## Revenue

1		<b>Candy Crush Saga</b>	Match-3
2		<b>Coin Master</b>	Party
3		<b>Roblox</b>	Sandbox
4		<b>Evony</b>	SLG
5		<b>Bingo Blitz™</b>	Bingo
6		<b>RAID</b>	RPG
7		<b>Candy Crush Soda Saga</b>	Match-3
8		<b>Garena Free Fire</b>	Shooter
9		<b>Pokémon GO</b>	Action
10		<b>Clash of Clans</b>	SLG

# Analysis of Popular Game Genres in the USA

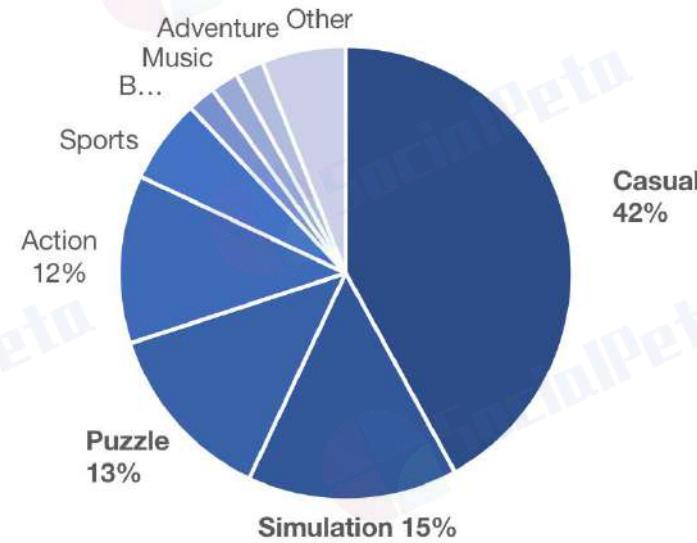


Top 100 mobile games by download & revenue in H1 in the USA

## App Store

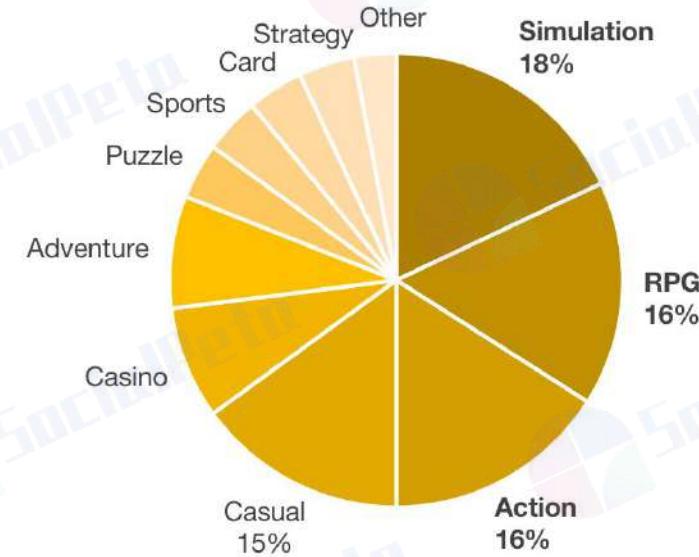
### Top 100 by Download

Casual games gained the most spots in the rankings of Top 100 by Download, accounting for 42%, followed by simulation games and puzzle games.



### Top 100 by Revenue

Simulation games were the most on the chart of Top 100 by Revenue, accounting for 18%, followed by RPGs and action games.



# Analysis of Mobile Game Advertisers in the USA



Casual puzzle games contributed the most advertising;

Mid-core and hard-core games dominated the advertising chart.

## Percentages of advertising by game genre

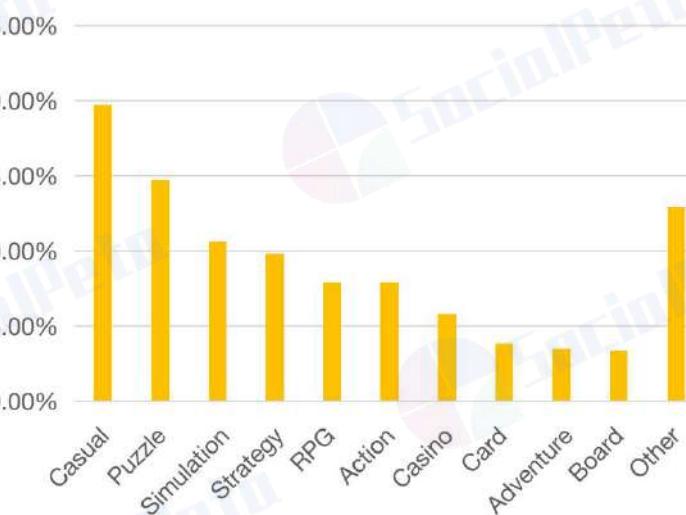
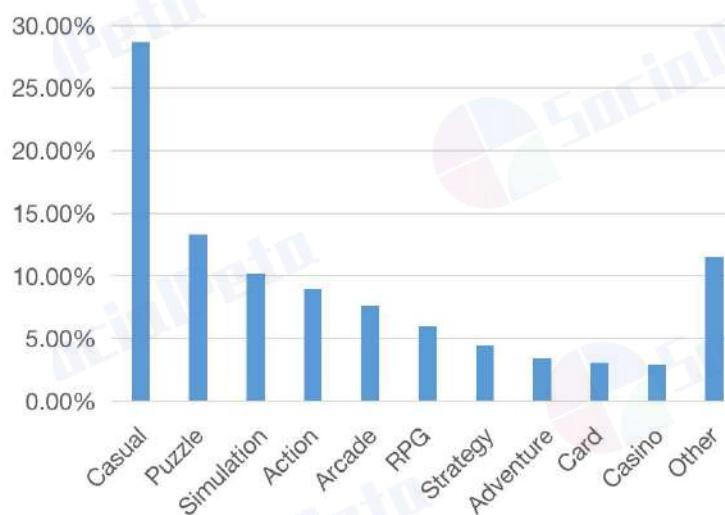
In 2022, the global market reported a YoY decline for the first time, American games even recorded a revenue decline of over 10%.

The American market recorded a significant drop in advertisers in Q1, with a peak of advertising in April.

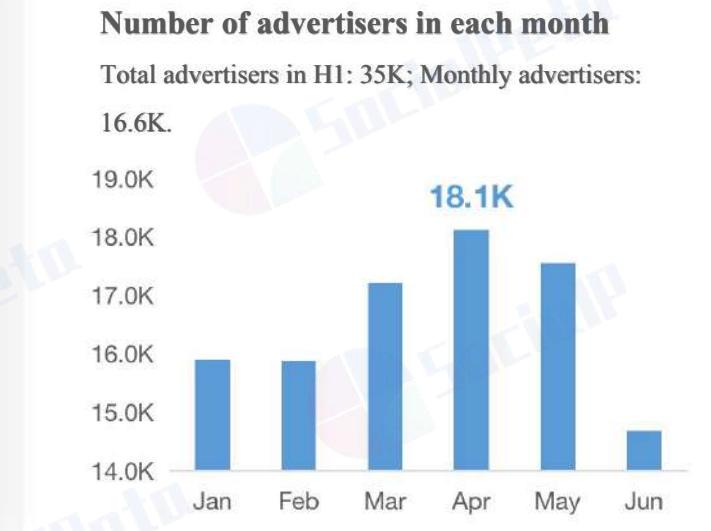
Hyper-casual and puzzle games contributed over 40% of advertisers to become the hottest game genres by advertising.

In terms of the advertising creatives per game, mid-core and hardcore mobile games, such as SLGs, match-3 games, made the greatest advertising efforts.

■ Active Advertisers ■ Active Creatives



Jackpot World™ Lotsa Slots Kingdom Guard



# Top 10 Mobile Games in Japan



## ⤧ Download

1		<b>Apex Legends Mobile</b>	Electronic Arts	Shooter
2		<b>Diablo Immortal</b>	Blizzard Entertainment, Inc.	ARPG
3		<b>最強</b>	Qingci Games	Idle
4			Imagineer	ARPG
5		<b>新信長 野望</b>	BBGame	SLG
6		<b>T3 Arena</b>	XD Inc.	Shooter
7		<b>Fishdom</b>	Playrix	Casual
8			SEGA	Music
9		<b>stop the flow!</b>	FTY	Puzzle
10		<b>Bucket Crusher</b>	Voodoo	Hyper-Casual

## ⤧ Revenue

1		<b>Fate/Grand Order</b>	Aniplex	RPG
2		<b>Genshin Impact</b>	miHoYo	Adventure
3			XFLAG	RPG
4		<b>Pokémon GO</b>	Niantic	Action
5			Cygames	Simulation
6			GungHo	Puzzle
7		<b>野球</b>	KONAMI	Sports
8			SEGA	Music
9		<b>Music</b>	Happy Elements	Music
10		<b>Knives Out</b>	NetEase Games	Shooter

## ➤ Download

1		<b>Miracle Match</b>	Imagineer	ARPG
2		<b>Apex Legends Mobile</b>	Electronic Arts	Shooter
3		<b>Parking Jam 3D</b>	Popcore Games	Puzzle
4		<b>SortPuz</b>	JoyPuz	Puzzle
5			DMMGAMES	Wargame
6		<b>Count Masters</b>	AIBY	Hyper-Casual
7			SEGA	Music
8			Lingxi Games	RPG
9		-単語	Betta Games	Puzzle
10		<b>放置少女</b>	C4-Games	Idle

## ➤ Revenue

1			Cygames	Simulation
2			XFLAG	RPG
3		<b>Fate/Grand Order</b>	Aniplex	RPG
4			GungHo	Puzzle
5			WFS	RPG
6		<b>Puzzles &amp; Survival</b>	37Games	SLG
7		<b>三國志 真戰</b>	Lingxi Games	SLG
8		<b>放置少女</b>	C4-Games	Idle
9			SQUARE ENIX	RPG
10		<b>FFBE幻影戰爭</b>	SQUARE ENIX	Wargame

# Analysis of Popular Game Genres in Japan

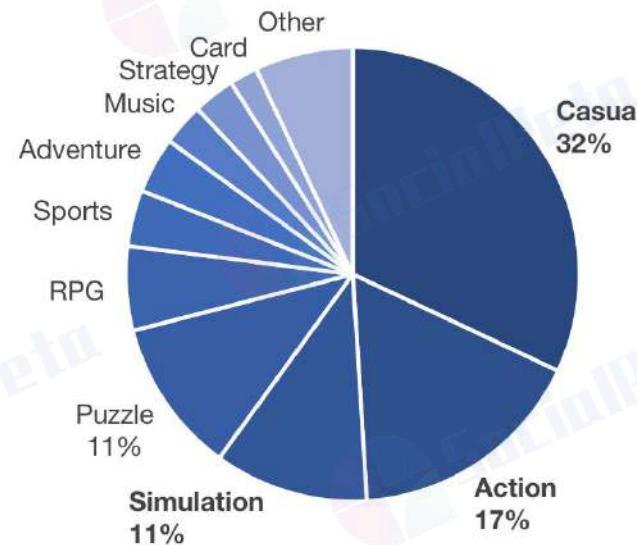


Top 100 mobile games by download & revenue in H1 in Japan

## App Store

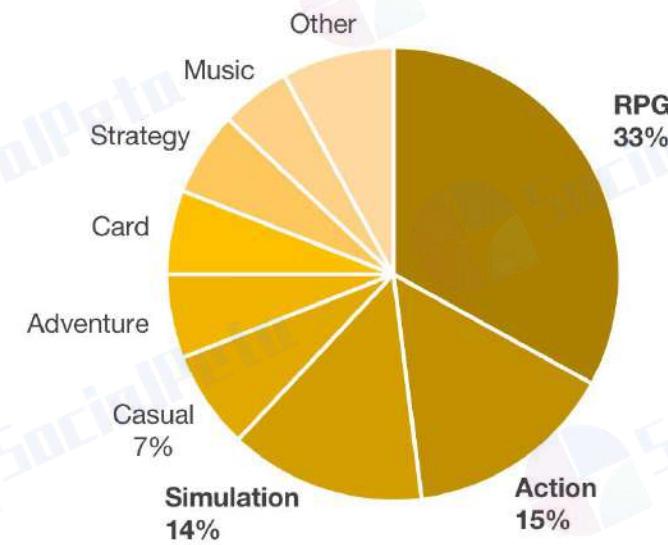
### Top 100 by Download

Casual games gained the most spots in the rankings of Top 100 by Download, accounting for 18.7%, followed by action games and simulation games.



### Top 100 by Revenue

RPGs were the most on the chart of Top 100 by Revenue, accounting for 33%, followed by action games and simulation games.



# Analysis of Mobile Game Advertisers in Japan



**Simulation** games were outstanding in advertising; **ACGN** games reported a stable revenue.

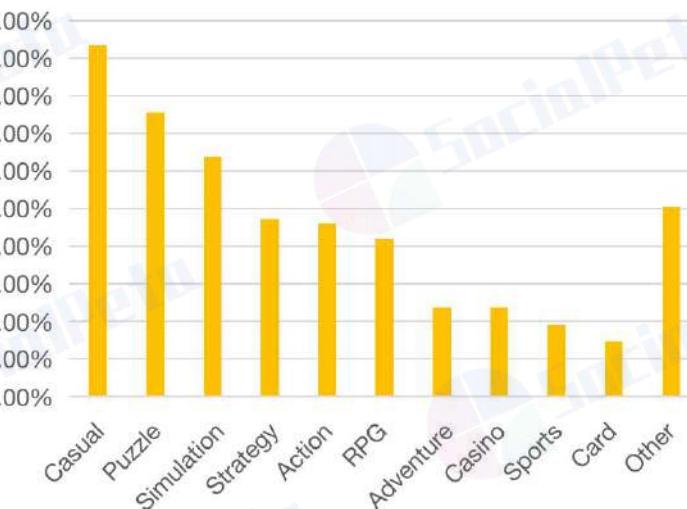
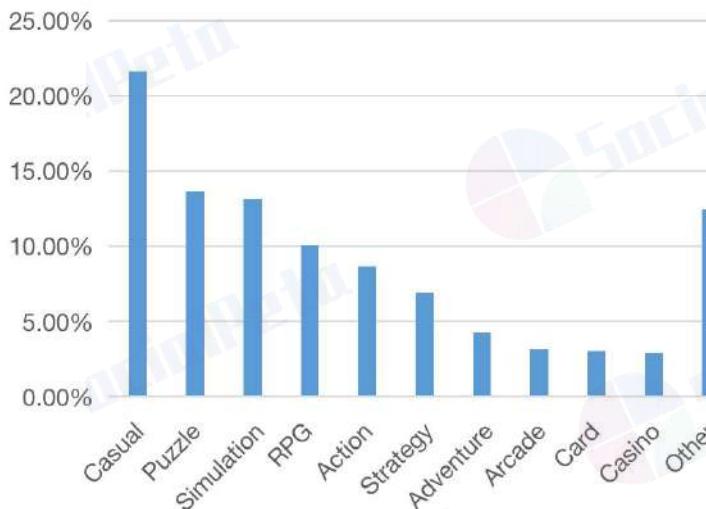
## Percentages of advertising by game genre

Seen from the download and revenue performance, the market continued with the trends in 2021. ACGN and PVP were the most popular game elements in Japan, while RPG and business simulation are the most popular game genres.

With an analysis of top games, we can easily notice that IP games have been increasing over years. For example, Diablo and Sanrio all achieved excellent performance. Besides, historical and three kingdoms related games with girl characters have the innate cultural advantages.

In terms of advertising creatives, simulation games and RPGs were outstanding. The ad copies focused on light gameplays that were entertaining and relaxing.

■ Active Advertisers ■ Active Creatives



## Number of advertisers in each month

Total advertisers in H1: 11.4K; Monthly advertisers:



# Top 10 Mobile Games in South Korea



## Download

1		<b>Diablo Immortal</b>	Blizzard Entertainment, Inc.	ARPG
2		NOBLEGAMES		RPG
3		<b>T3 Arena</b>	KD Inc.	Shooter
4		<b>Pokémon GO</b>	Niantic	Action
5		<b>TenTen</b>	AppTeenPlanet	Party
6		Ekkorr		RPG
7		<b>Beggar Life</b>	Treepilla	Simulation
8		:	Bilibili	RPG
9		<b>Bucket Crusher</b>	Voodoo	Hyper-Casual
10		!	朝夕光年	Music

## Revenue

1		<b>Diablo Immortal</b>	Blizzard Entertainment, Inc.	ARPG
2		M	NCSOFT	MMO
3		:	Kakao Games	MMO
4			NEXON	ARPG
5		<b>FIFA ONLINE 4 M</b>	NEXON	Sports
6		<b>Genshin Impact</b>	miHoYo	Adventure
7		W	NCSOFT	MMO
8		2M	NCSOFT	MMO
9			Lilith Games	SLG
10		<b>Pokémon GO</b>	Niantic	Action

## Download

1		KingKongSOFT		Idle
2		:	CHAPLIN GAME	RPG
3		<b>Pokémon GO</b>	Niantic	Action
4		M:	NGELGAMES	Idle
5			37Games	MMO
6		S.O.S:	FunPlus	SLG
7		<b>Blockudoku</b>	Easybrain	Puzzle
8		<b>Infinite Stairs</b>	NFLY STUDIO	Action
9		<b>Cubes Control</b>	SayGames	Puzzle
10		<b>Monster Egg</b>	HOMA GAMES	Arcade

## Revenue

1		<b>Lineage W</b>	NCSOFT	MMO
2		M	NCSOFT	MMO
3		:	Kakao Games	MMO
4			NEXON	ARPG
5		2M	NCSOFT	MMO
6			37Games	MMO
7		3	Webzen	MMO
8		&	Netmarble	MMO
9		기적의검	4399	MMO
10		<b>Roblox</b>	Roblox	Sandbox

# Analysis of Popular Game Genres in South Korea

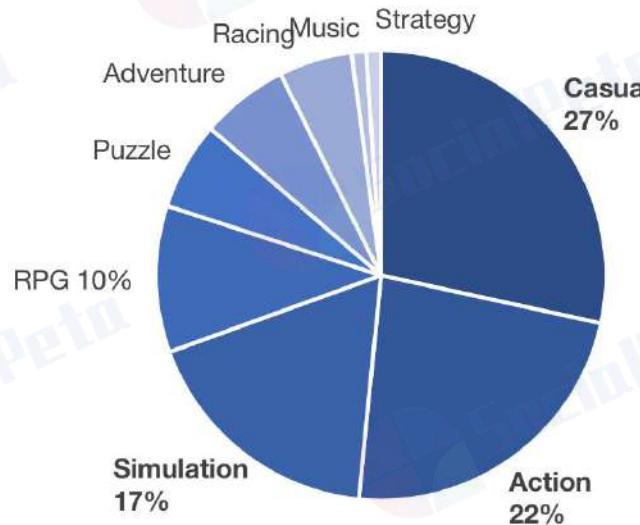


Top 100 mobile games by download & revenue in H1 in South Korea

## App Store

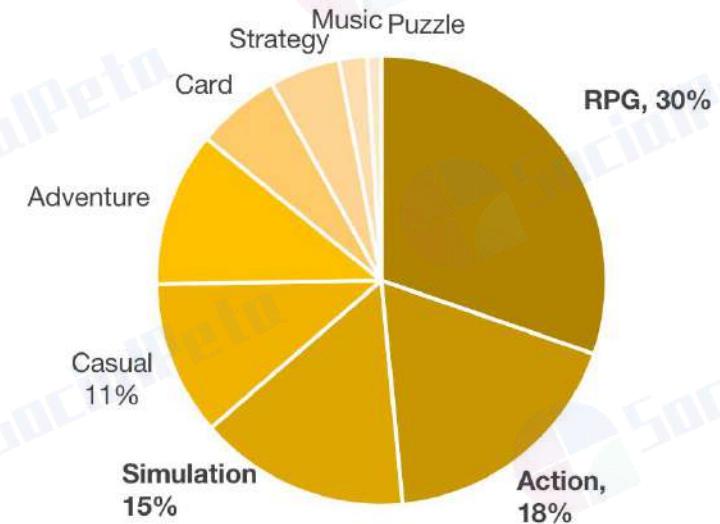
### Top 100 by Download

Casual games gained the most spots in the rankings of Top 100 by Download, accounting for 27%, followed by action games and simulation games.



### Top 100 by Revenue

RPGs were the most on the chart of Top 100 by Revenue, accounting for 30%, followed by action games and simulation games.



# Analysis of Mobile Game Advertisers in South Korea



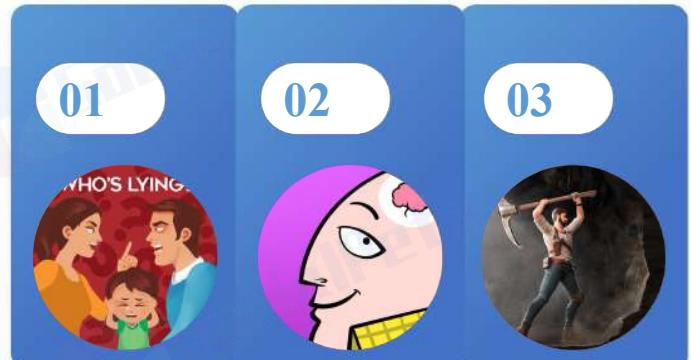
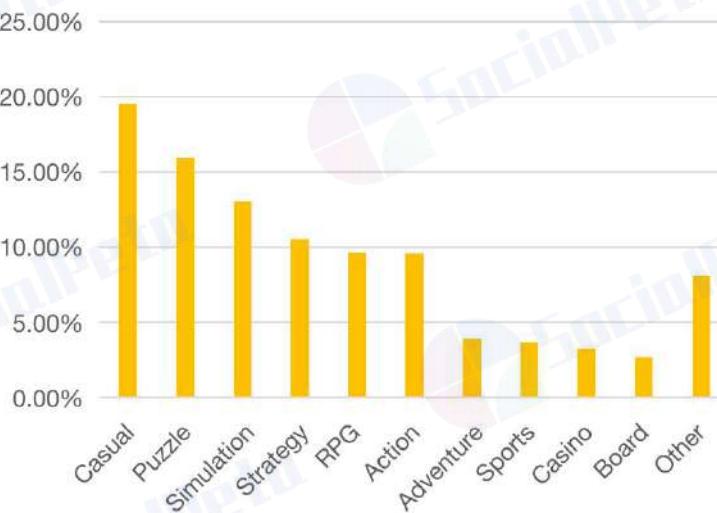
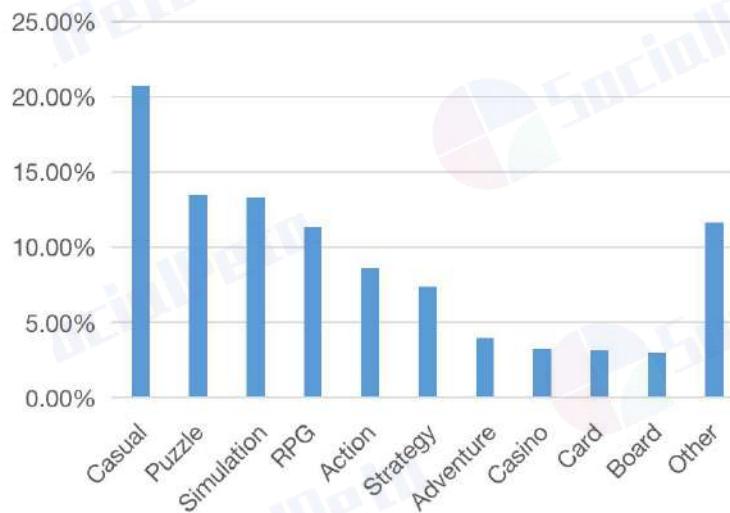
**MMO games were still the highest-grossing; Card RPGs became the main force in advertising**

## Percentages of advertising by game genre

Among the top games by download and revenue, MMO still held a dominating position in the South Korean market. However, with few changes in game genres and a long period before new games are available, local game companies in South Korea, such as NCSOFT and Kakao Games, recorded a significant decline in revenue.

In the global game market, South Korean game companies were the fastest to accept NFT games. After [MIR4], the blockchain element could be found in many other mobile games.

■ Active Advertisers ■ Active Creatives



Braindom 2      Braindom      Last Fortress



# Top 10 Mobile Games in Turkey



## Download

1		<b>Diablo Immortal</b> Blizzard Entertainment, Inc.	ARPG
2		<b>Bucket Crusher</b> Voodoo	Hyper-Casual
3		<b>Tall Man Run</b> Supersonic	Hyper-Casual
4		<b>Subway Surfers</b> Sybo Games	Parkour
5		<b>PUBG MOBILE</b> Level Infinite	Shooter
6		<b>Bus Simulator</b> Zuks Games	Simulation
7		<b>101 YüzBir Okey Plus</b> Zynga	Board
8		<b>Roblox</b> Roblox	Sandbox
9		<b>Brain Find</b> Eyewind	Puzzle
10		<b>Head Ball 2</b> MASOMO	Sports

## Revenue

1		<b>PUBG MOBILE</b> Level Infinite	Shooter
2		<b>Evony</b> Top Games	SLG
3		<b>101 YüzBir Okey Plus</b> Zynga	Board
4		<b>Candy Crush Saga</b> King	Match-3
5		<b>Clash of Clans</b> Supercell	SLG
6		<b>Final Fantasy XV</b> Epic	SLG
7		<b>Mobile Legends</b> Moonton	MOBA
8		<b>Rise of Kingdoms</b> Lilith Games	SLG
9		<b>State of Survival</b> FunPlus	SLG
10		<b>Diablo Immortal</b> Blizzard Entertainment, Inc.	ARPG

## Download

1		<b>Tall Man Run</b> Supersonic	Hyper-Casual
2		<b>Save the grandmother</b> MondayOFF	Hyper-Casual
3		<b>Join Numbers</b> Supersonic	Hyper-Casual
4		<b>Apex Legends Mobile</b> Electronic Arts	Shooter
5		<b>Fish Eater.io</b> Tap 2 Fun	Hyper-Casual
6		<b>Moneygun Run!</b> Voodoo	Hyper-Casual
7		<b>Monster Egg</b> HOMA GAMES	Arcade
8		<b>Move Animals</b> Supersonic	Hyper-Casual
9		<b>Figurine Art</b> TapNation	Hyper-Casual
10		<b>Merge Master</b> HOMA GAMES	Arcade

## Revenue

1		<b>PUBG MOBILE</b> Level Infinite	Shooter
2		<b>101 YüzBir Okey Plus</b> Zynga	Board
3		<b>Garena Free Fire</b> GARENA	Shooter
4		<b>Big Fish Casino</b> Big Fish Games	Slots
5		<b>Mobile Legends</b> Moonton	MOBA
6		<b>Lords Mobile</b> IGG	SLG
7		<b>Jackpot Magic Slots</b> Big Fish Games	Slots
8		<b>Game of War</b> Machine Zone	SLG
9		<b>Candy Crush Saga</b> King	Match-3
10		<b>EA SPORTSTM FIFA 22</b> ELECTRONIC ARTS	Sports

# Analysis of Mobile Game Advertisers in Turkey



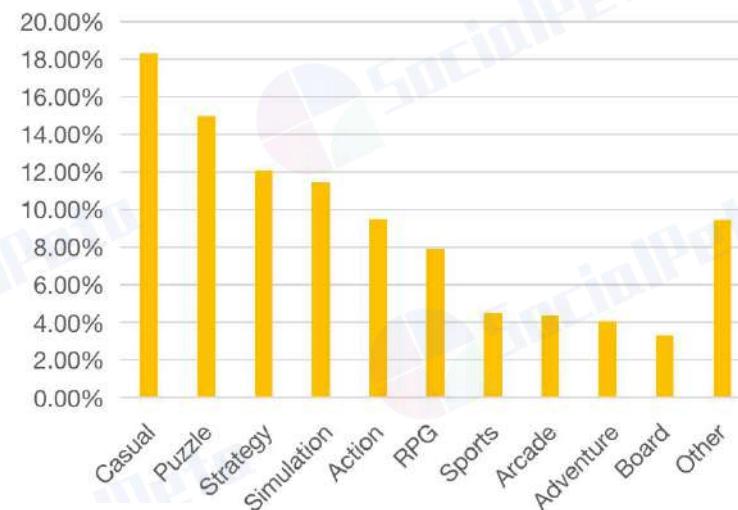
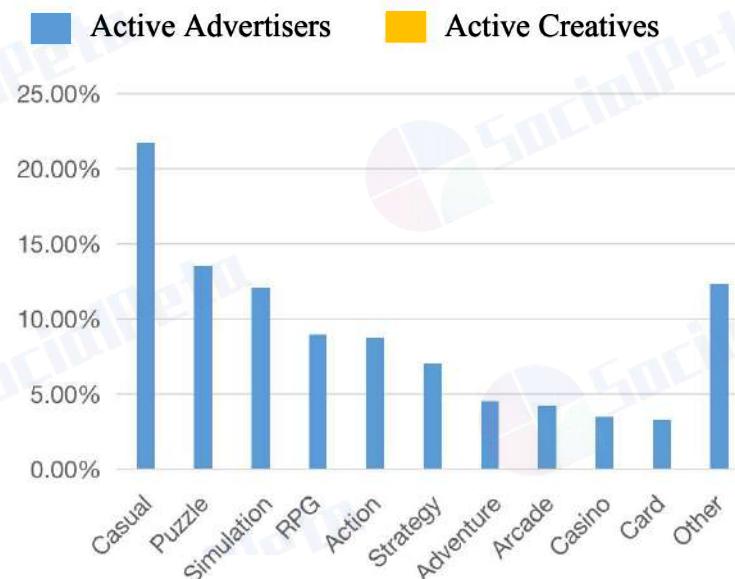
**Esports** garnered much attention; **Match-3** games were very likely to become big hits

## Percentages of advertising by game genre

Since Q1, Turkey has seen a lot of investment and financing activities for casual and puzzle mobile games. This year started with many advertising creatives, with a peak of creatives in January.

The local game developers customized products and services to meet local people's preferences. Casual & puzzle games made great efforts in advertising, such as Dream Games' popular decoration + match-3 game [Royal Match].

Parkour games were very popular in the Turkish market with its large population and great consumption ability. Social + esports games were also highly rated. In December, the World Electronic Sports Games will be held in Turkey. Live streaming matches of influencers, such as [Arena of Valor], earned quite much popularity.



Braindom

Braindom 2

Kingdom Guard

## Number of advertisers in each month

Total advertisers in H1: 8.1K; Monthly advertisers: 5.2K.



# Top 10 Mobile Games in Southeast Asia



## Download

1		<b>Garena Liên Quân Mobile</b>	GARENA	MOBA
2		<b>Subway Surfers</b>	Sybo Games	Parkour
3		<b>Garena Free Fire</b>	GARENA	Shooter
4		<b>Roblox</b>	Roblox	Sandbox
5		<b>Mobile Legends</b>	Moonton	MOBA
6		<b>8 Ball Pool™</b>	Miniclip	Sports
7		<b>Play Together</b>	HAEGIN	Simulation
8		<b>Candy Crush Saga</b>	King	Match-3
9		<b>Stumble Guys</b>	Kitka Games	Battle Royale
10		<b>Plants vs. Zombies™ 2</b>	PopCap	Strategy

## Revenue

1		<b>Genshin Impact</b>	miHoYo	Adventure
2		<b>Mobile Legends</b>	Moonton	MOBA
3		<b>Roblox</b>	Roblox	Sandbox
4		<b>Garena ROV</b>	GARENA	MOBA
5		<b>eFootball™ 2022</b>	KONAMI	Sports
6		<b>PUBG MOBILE</b>	Level Infinite	Shooter
7		<b>Rise of Kingdoms</b>	Lilith Games	SLG
8		<b>Coin Master</b>	Moon Active	Party
9		<b>Garena Free Fire</b>	GARENA	Shooter
10		<b>Candy Crush Saga</b>	King	Match-3

## Download

1		<b>Roblox</b>	Roblox	Sandbox
2		<b>Subway Surfers</b>	Sybo Games	Parkour
3		<b>Mobile Legends</b>	Moonton	MOBA
4		<b>Garena Free Fire</b>	GARENA	Shooter
5		<b>Find the Alien</b>	Moonee	Hyper-Casual
6		<b>Super Sus</b>	PIPProductions	Party
7		<b>Stickman Party</b>	PlayMax Game	Arcade
8		<b>Piano Fire</b>	Adaric Music	Music
9		<b>Worms Zone</b>	CASUAL AZUR GAMES	Hyper-Casual
10		<b>Higgs Domino Island</b>	BOKE	Casino

## Revenue

1		<b>Garena Free Fire</b>	Garena	Shooter
2		<b>Mobile Legends</b>	Moonton	MOBA
3		<b>Roblox</b>	Roblox	Sandbox
4		<b>Genshin Impact</b>	miHoYo	Adventure
5		<b>Garena ROV</b>	Garena	MOBA
6		<b>Coin Master</b>	Moon Active	Party
7		<b>Garena Free Fire MAX</b>	GARENA	Shooter
8		<b>eFootball PES 2021</b>	KONAMI	Sports
9		<b>PUBG MOBILE</b>	Level Infinite	Shooter
10		<b>Higgs Domino Island</b>	BOKE	Casino

# Analysis of Mobile Game Advertisers in Southeast Asia



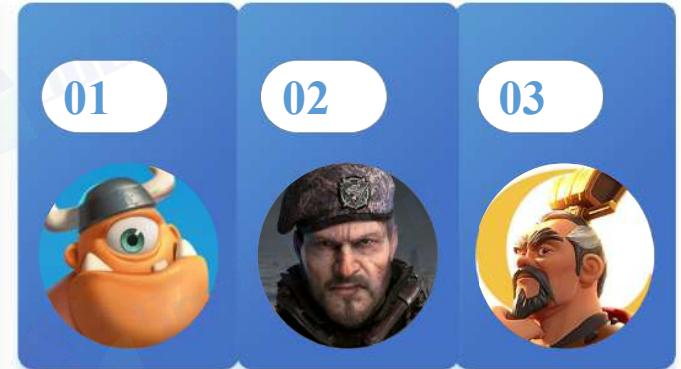
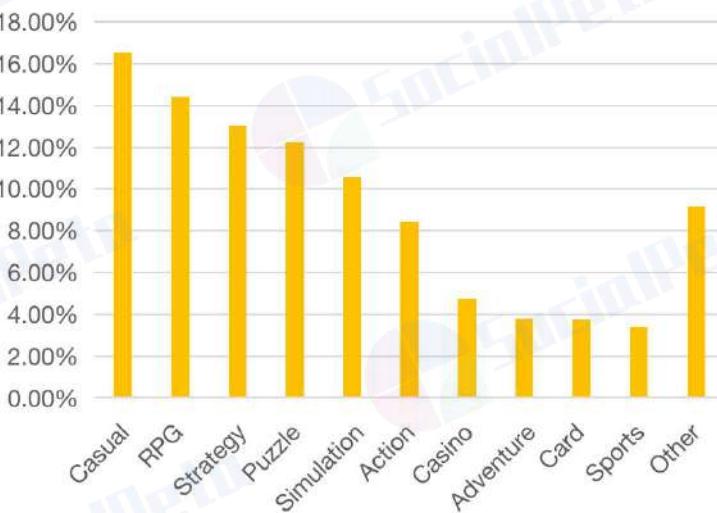
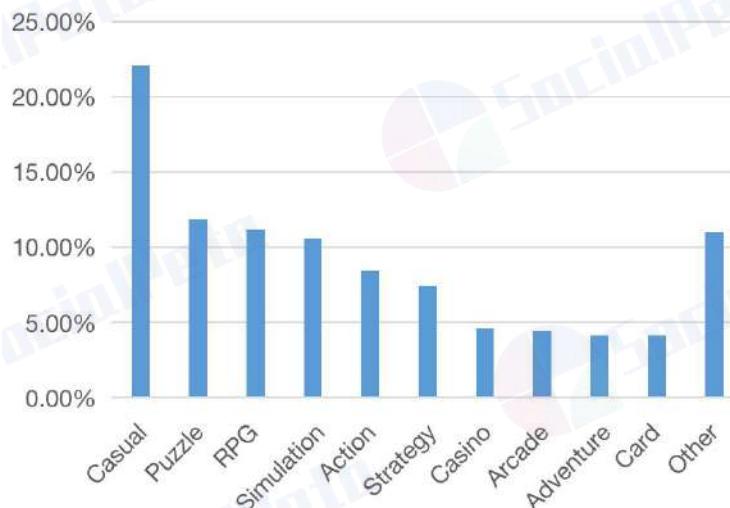
**MOBA & Shooter** games topped the revenue chart; **RPGs** had outstanding creatives

## Percentages of advertising by game genre

As the 4th biggest internet market in the world, the Southeast Asian mobile game market has expanded very fast. The market is characterized by a large percentage of younger users, female users with high spending power, great popularity of social games, amazing effects of advertising creatives and influencer marketing.

With the current hardware and network environment, Southeast Asian game companies need to spend much more on building servers and improving games.

■ Active Advertisers ■ Active Creatives



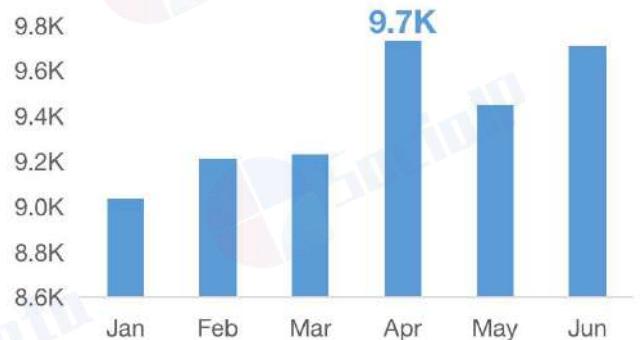
Kingdom Guard

Last Shelter

Rise of Kingdoms

## Number of advertisers in each month

Total advertisers in H1: 15.8K; Monthly advertisers: 9.4K.



# Top 10 Mobile Games in Middle East



## Download

1		<b>Subway Surfers</b>	Parkour
2		<b>PUBG MOBILE</b>	Shooter
3		<b>Fishdom</b>	Match-3
4		<b>Roblox</b>	Sandbox
5		<b>Snake.io</b>	Hyper-Casual
6		<b>Bridge Race</b>	Hyper-Casual
7		<b>8 Ball Pool™</b>	Sports
8		<b>FIFA Soccer</b>	Sports
9		<b>Going Balls</b>	Hyper-Casual
10		<b>Magic Tiles 3</b>	Music

## Revenue

1		<b>PUBG MOBILE</b>	Shooter
2		<b>Yalla Ludo</b>	Board
3		<b>Roblox</b>	Sandbox
4		<b>Rise of Kingdoms</b>	SLG
5		<b>بلوت تربیعة</b>	Card
6		<b>السلطان انتقام</b>	SLG
7		<b>Clash of Clans</b>	SLG
8		<b>Evony</b>	SLG
9		<b>Top War</b>	SLG
10		<b>Royal Match</b>	Match-3

## Download

1		<b>Subway Surfers</b>	Parkour
2		<b>Merge Master</b>	Arcade
3		<b>Going Balls</b>	Hyper-Casual
4		<b>FIFA Soccer</b>	Sports
5		<b>PUBG MOBILE</b>	Shooter
6		<b>Candy Crush Saga</b>	Match-3
7		<b>Fishdom</b>	Match-3
8		<b>Snake.io</b>	Hyper-Casual
9		<b>Magic Tiles 3</b>	Music
10		<b>8 Ball Pool™</b>	Sports

## Revenue

1		<b>PUBG MOBILE</b>	Shooter
2		<b>Yalla Ludo</b>	Board
3		<b>Garena Free Fire</b>	Shooter
4		<b>Roblox</b>	Sandbox
5		<b>Rise of Kingdoms</b>	SLG
6		<b>Top War</b>	SLG
7		<b>Evony</b>	SLG
8		<b>State of Survival</b>	SLG
9		<b>Mobile Legends</b>	MOBA
10		<b>Clash of Clans</b>	SLG

# Analysis of Mobile Game Advertisers in Middle East



Strategy games were popular in the region; Heavily customized SLGs dominated the chart

## Percentages of advertising by game genre

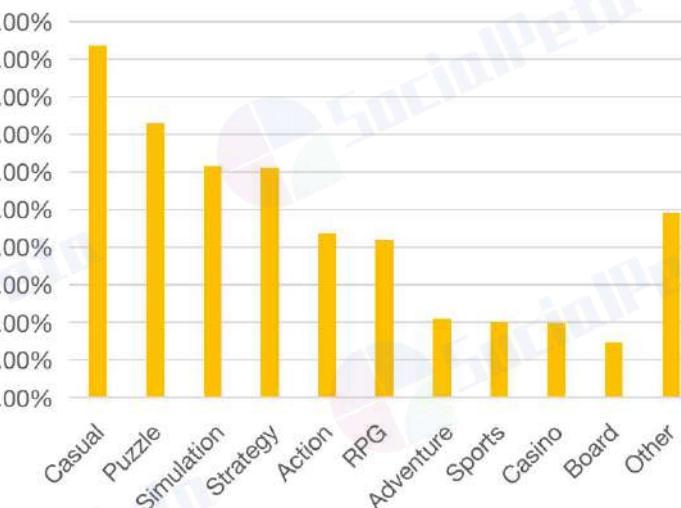
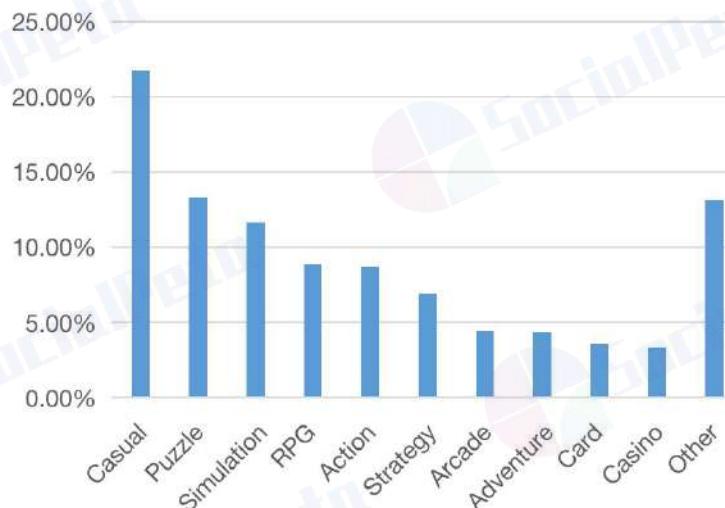
As a Blue Ocean market with great potential, the Middle East market has attracted considerable attention with its three major characteristics: a high percentage of young users, a high penetration of smart phones, and a high willingness to spend money.

The region is weak in game research and development, so it's common to see many companies from other regions on the chart.

Strategy games, especially SLGs that were localized for the Middle East region, recorded outstanding revenue.

As for advertising creatives, Arabic short stories that agreed with the local cultures could obviously improve the creatives' impressions and conversion rate.

■ Active Advertisers ■ Active Creatives



## Number of advertisers in each month

Total advertisers: 10.6K; Monthly advertisers: 6.7K.



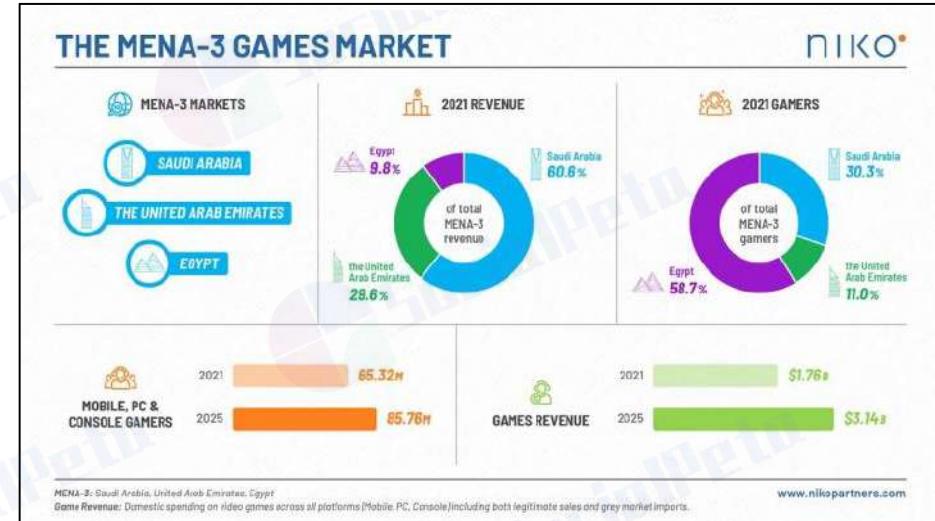
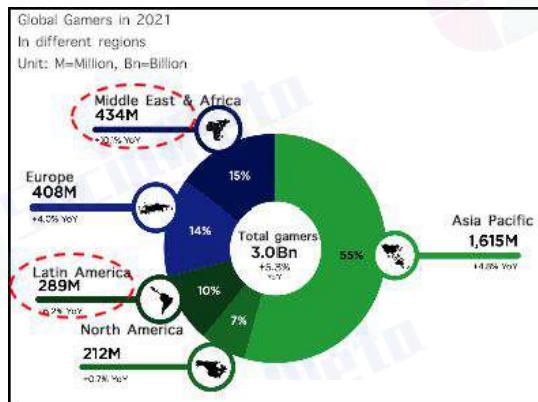
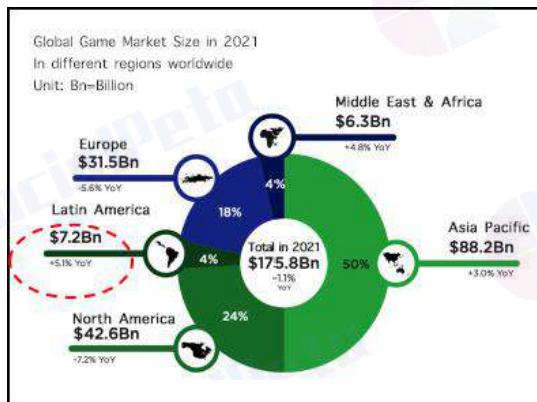
# Analysis of Mobile Game Advertisers in Middle East



## Middle East is an emerging market with the fastest-growing gamers

According to Newzoo Global Mobile Market Report 2021, Middle East and Africa reported revenue growth rates that were much higher than the average rate. In 2021, the market size and number of gamers grew at 4.8% and 10.1%, respectively. The upgraded network infrastructure and the popularization of smart phones and mobile network packages in the region have boosted the growth of the game industry (Chart 1 & 2) and enriched the network experience. Phone users in Middle East like AR filters very much. Snapchat users from Saudi Arabia generated over 90 billion views for AR filters during Ramadan in 2021.

The game market survey company NocoPartner predicted that, as of 2025, the total number of gamers will grow to 85.8 million in the three major markets in Middle East and North Africa (MENA): Saudi Arabia, the UAE and Egypt, reaching \$3.1 billion in annual revenue (Chart 3). Snapchat also had a very high penetration rate in those markets, with a penetration rate of over 90% among people of age 13-34 in Saudi Arabia.



More and more cases have proven that it's possible to copy the success in the Middle East market.

As the international game market slowed down, game companies increased their exploration of emerging markets. In Middle East, Chinese app companies have achieved more and more reproducible successes. Snapchat has helped many game titles gain popularity worldwide. Among these, PUBG MOBILE topped No.1 in terms of sales in Saudi Arabia and Turkey. And Revenge of Sultans, a game completely customized for the Middle East market, stood out among all other SLGs in Middle East, with its monthly in-game revenue of around \$5 million.

# Top 10 Mobile Games in South America



## Download

1		<b>Subway Surfers</b>	Parkour
2		<b>Stumble Guys</b>	Battle Royale
3		<b>Garena Free Fire</b>	Shooter
4		<b>8 Ball Pool™</b>	Sports
5		<b>Roblox</b>	Sandbox
6		<b>Clash Royale</b>	Card
7		<b>Call of Duty®: Mobile</b>	Shooter
8		<b>Candy Crush Saga</b>	Match-3
9		<b>Count Masters</b>	Hyper-Casual
10		<b>Fishdom</b>	Match-3

## Revenue

1		<b>Garena Free Fire</b>	Shooter
2		<b>Candy Crush Saga</b>	Match-3
3		<b>Coin Master</b>	Party
4		<b>Roblox</b>	Sandbox
5		<b>Clash Royale</b>	Card
6		<b>Gardenscapes</b>	Match-3
7		<b>Homescapes</b>	Match-3
8		<b>Stumble Guys</b>	Battle Royale
9		<b>Call of Duty®: Mobile</b>	Shooter
10		<b>Genshin Impact</b>	Adventure

## Download

1		<b>Stumble Guys</b>	Battle Royale
2		<b>Subway Surfers</b>	Parkour
3		<b>Garena Free Fire</b>	Shooter
4		<b>Roblox</b>	Sandbox
5		<b>Pou</b>	Simulation
6		<b>Race Master 3D</b>	Hyper-Casual
7		<b>Craftsman</b>	Simulation
8		<b>Merge Master</b>	Arcade
9		<b>Piano Fire</b>	Music
10		<b>Among Us</b>	Social deduction

## Revenue

1		<b>Coin Master</b>	Party
2		<b>Garena Free Fire</b>	Shooter
3		<b>Roblox</b>	Sandbox
4		<b>Clash of Clans</b>	SLG
5		<b>Call of Duty®: Mobile</b>	Shooter
6		<b>Candy Crush Saga</b>	Match-3
7		<b>Garena Free Fire MAX</b>	Shooter
8		<b>Stumble Guys</b>	Battle Royale
9		<b>Clash Royale</b>	Card
10		<b>Lords Mobile</b>	SLG

# Analysis of Mobile Game Advertisers in South America



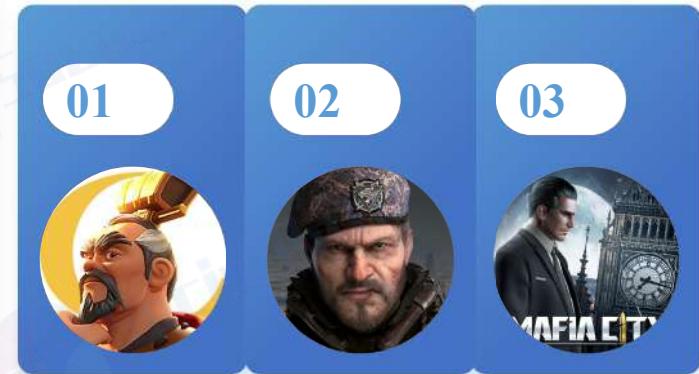
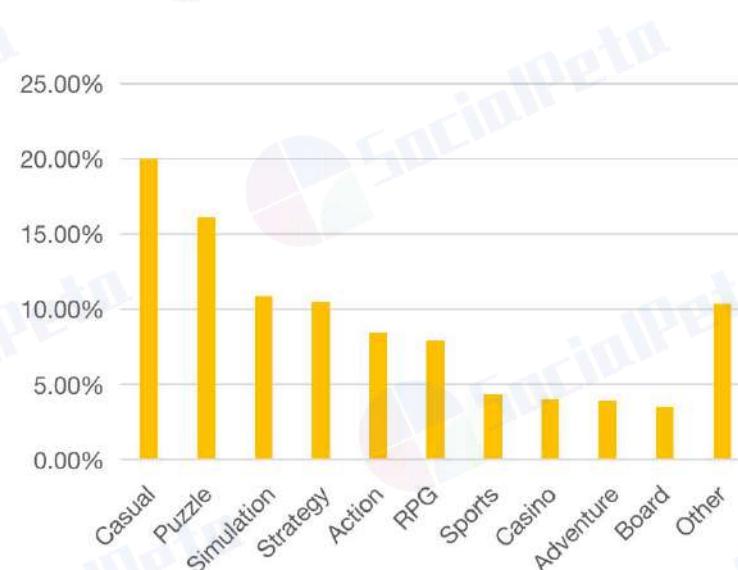
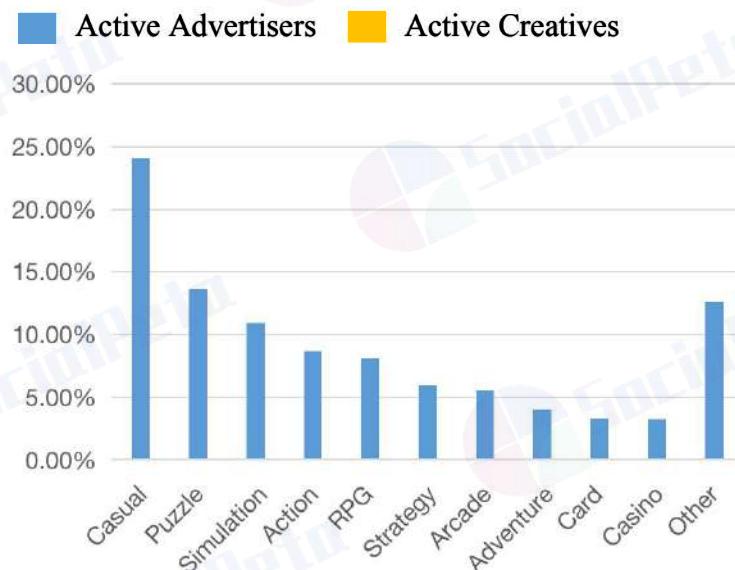
Action and simulation games focused on advertising; Card games showed strong momentum.

## Percentages of advertising by game genre

With a population of 400 million people, South America is a very promising blue ocean market of network. Action and casual mobile games are very popular there.

Compared to expensive console games and PC games, mobile games are easier to access and there enjoy quite an advantage in the Brazilian market. As for operating systems, Android users are more than iOS users.

Thanks to the Brazilian policies, offshore casino games and competitive card games have become the important channels for people to enjoy the pleasure of competition.



Rise of Kingdoms      Last Shelter      Mafia City



# Top 10 Mobile Games in South Asia



## Download

1		<b>BATTLEGROUNDS</b>	KRAFTON	Shooter
2		<b>Ludo King</b>	Gametion	Board
3		<b>Subway Surfers</b>	Sybo Games	Parkour
4		<b>Candy Crush Saga</b>	King	Match-3
5		<b>8 Ball Pool™</b>	Miniclip	Sports
6		<b>WinZO Games</b>	TICTOK SKILL GAMES	Casino
7		<b>Going Balls</b>	Supersonic	Hyper-Casual
8		<b>Bridge Race</b>	Supersonic	Hyper-Casual
9		<b>Cricket League</b>	Miniclip	Sports
10		<b>Evony</b>	Top Games	SLG

## Revenue

1		<b>BATTLEGROUNDS</b>	KRAFTON	Shooter
2		<b>Candy Crush Saga</b>	King	Match-3
3		<b>PUBG MOBILE</b>	Level Infinite	Shooter
4		<b>Evony</b>	Top Games	SLG
5		<b>Coin Master</b>	Moon Active	Party
6		<b>Blackjack 21</b>	KamaGames	Casino
7		<b>Clash of Clans</b>	Supercell	SLG
8		<b>Top War</b>	RiverGame	SLG
9		<b>Call of Duty®: Mobile</b>	Tencent & Activision Blizzard	Shooter
10		<b>Roblox</b>	Roblox	Sandbox

## Download

1		<b>Ludo King</b>	Gametion	Board
2		<b>Garena Free Fire MAX</b>	GARENA	Shooter
3		<b>Carrom Pool</b>	Miniclip	Sports
4		<b>Subway Surfers</b>	Sybo Games	Parkour
5		<b>Candy Crush Saga</b>	King	Match-3
6		<b>Merge Master</b>	HOMA GAMES	Arcade
7		<b>Subway Princess Runner</b>	常春藤移动	Parkour
8		<b>Truck Simulator</b>	Games Wing	Simulation
9		<b>Hill Climb Racing</b>	Fingersoft	Racing
10		<b>Temple Run</b>	Imangi Studios	Parkour

## Revenue

1		<b>Garena Free Fire MAX</b>	GARENA	Shooter
2		<b>BATTLEGROUNDS</b>	KRAFTON	Shooter
3		<b>Coin Master</b>	Moon Active	Party
4		<b>Clash of Clans</b>	Supercell	SLG
5		<b>Teen Patti Octro</b>	Octro	Board
6		<b>Candy Crush Saga</b>	King	Match-3
7		<b>Garena Free Fire</b>	GARENA	Shooter
8		<b>Call of Duty®: Mobile</b>	Tencent & Activision Blizzard	Shooter
9		<b>Evony</b>	Top Games	SLG
10		<b>Teen Patti Gold Poker &amp; Rummy</b>	Moonfrog	Casino

# Analysis of Mobile Game Advertisers in South Asia

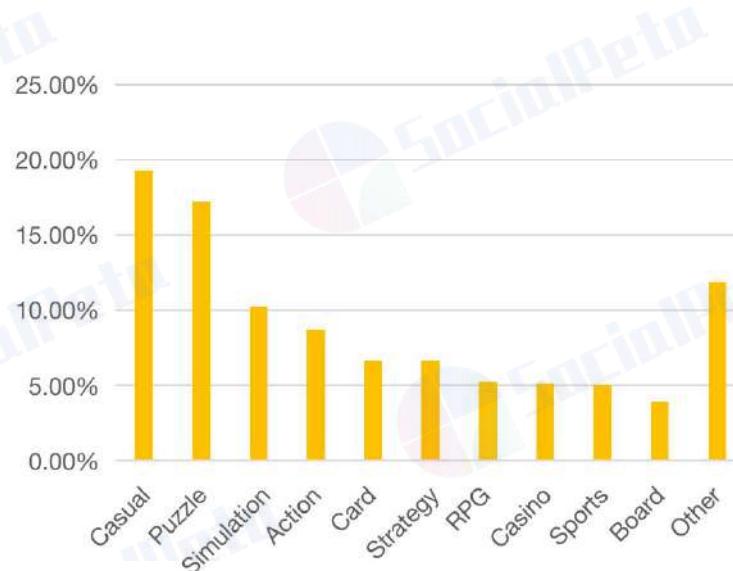
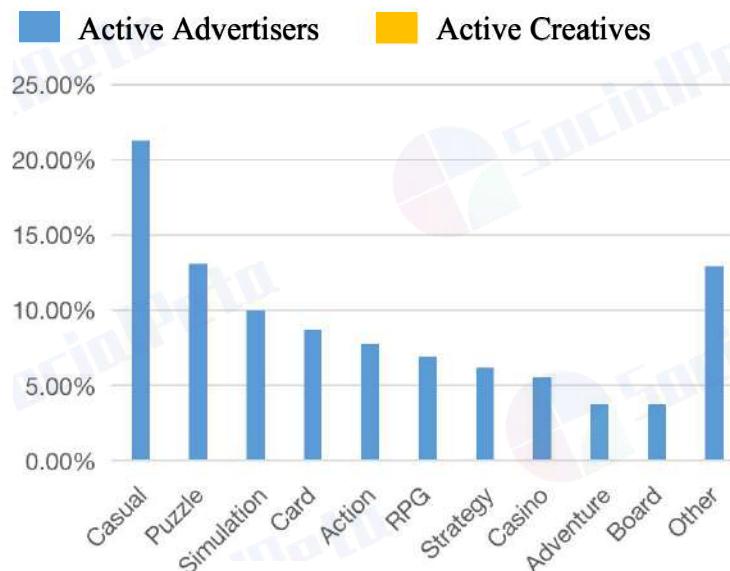


**Gun+car+ball games raked in revenue; Simulation games were big spenders in advertising**

## Percentages of advertising by game genre

Stimulation, action, and sports are the 3 most popular game genres in India, with Gun+car+ball games raking in revenue.

Seen from the download and revenue performance, top games need to meet users' social demands, and MOBA games need to provide the function of making friends. Integrating hyper-casual with the gameplay is a way to attract the increasing numbers of Indian female gamers. As the covid-19 pandemic has become a normal part of our lives and offline entertainment is recovering, real money games are becoming less attractive. The gameplay of real money games has been trying to be casual.



TeenPatti Real  
Poker

Braindom

Fishdom

## Number of advertisers in each month

Total advertisers: 10.0K; Monthly advertisers: 6.0K.





# Insights into Global Top Advertising Platforms

# Analysis of Mobile Game Advertising on Meta Platforms

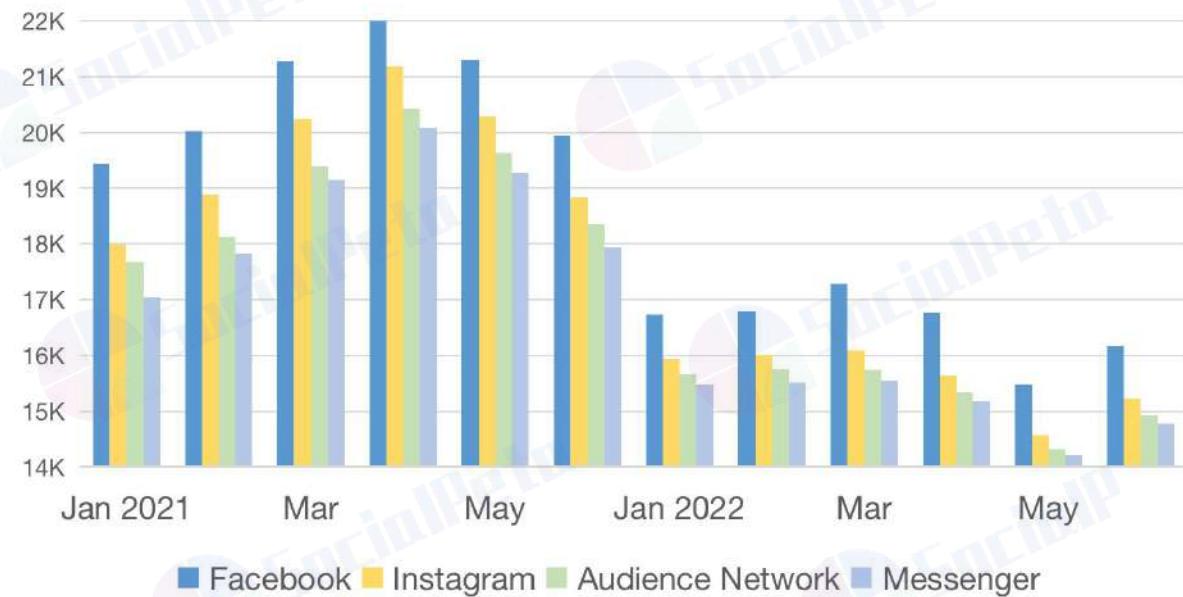


In H1 2022, Meta platforms had over 135,000 game advertisers.

	Total Advertisers	Monthly Advertisers
Facebook	35.2K	16.5K
Instagram	33.5K	15.6K
Audience Network	32.9K	15.3K
Messenger	32.7K	15.1K



H1 2021 saw a sharp decline in the number of game advertisers



# Top 10 Game Advertisers on Meta Platforms



Facebook		
1	<b>Sudoku</b> Learnings	Sudo ku
2	<b>Mafia City</b> Yotta Games	SLG
3	<b>Braindom 2</b> Matchingham Games	Puzzl e
4	<b>The Grand Mafia</b> Yotta Games	SLG
5	<b>Coloring Book</b> Doodle Mobile	Color ing
6	<b>Braindom</b> Matchingham Games	Puzzl e
7	<b>Find Out</b> Eyewind	Puzzl e
8	<b>Dream Piano</b> Eyugame	Musi c
9	<b>Case Hunter</b> Eyewind	Puzzl e
10	<b>Brain Out</b> Eyewind	Puzzl e

Instagram		
1	<b>Mafia City</b> Yotta Games	SLG
2	<b>The Grand Mafia</b> Yotta Games	SLG
3	<b>Sudoku</b> Learnings	Sudok u
4	<b>Braindom 2</b> Matchingham Games	Puzzle
5	<b>Coloring Book</b> Doodle Mobile	Colori ng
6	<b>Braindom</b> Matchingham Games	Puzzle
7	<b>Yalla Ludo</b> Yalla	Board
8	<b>Find Out</b> Eyewind	Puzzle
9	<b>Dream Piano</b> Eyugame	Music
10	<b>Case Hunter</b> Eyewind	Puzzle

Audience Network		
1	<b>Mafia City</b> Yotta Games	SLG
2	<b>The Grand Mafia</b> Yotta Games	SLG
3	<b>Sudoku</b> Learnings	Sudo ku
4	<b>Braindom 2</b> Matchingham Games	Puzzl e
5	<b>Coloring Book</b> Doodle Mobile	Color ing
6	<b>Yalla Ludo</b> Yalla	Board
7	<b>Jackpot World™</b> Bole Games	Slots
8	<b>Find Out</b> Eyewind	Puzzl e
9	<b>Braindom</b> Matchingham Games	Puzzl e
10	<b>Dream Piano</b> Eyugame	Music

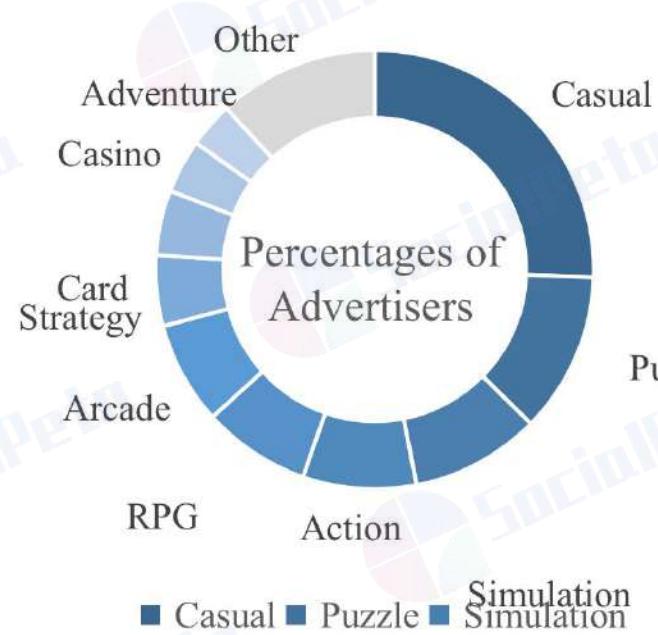
Messenger		
1	<b>Mafia City</b> Yotta Games	SLG
2	<b>The Grand Mafia</b> Yotta Games	SLG
3	<b>Sudoku</b> Learnings	Sudo ku
4	<b>Braindom 2</b> Matchingham Games	Puzzl e
5	<b>Coloring Book</b> Doodle Mobile	Color ing
6	<b>Yalla Ludo</b> Yalla	Board
7	<b>Find Out</b> Eyewind	Puzzl e
8	<b>Braindom</b> Matchingham Games	Puzzl e
9	<b>Dream Piano</b> Eyugame	Music
10	<b>Case Hunter</b> Eyewind	Puzzl e

# Analysis of Mobile Game Advertising on Meta Platforms

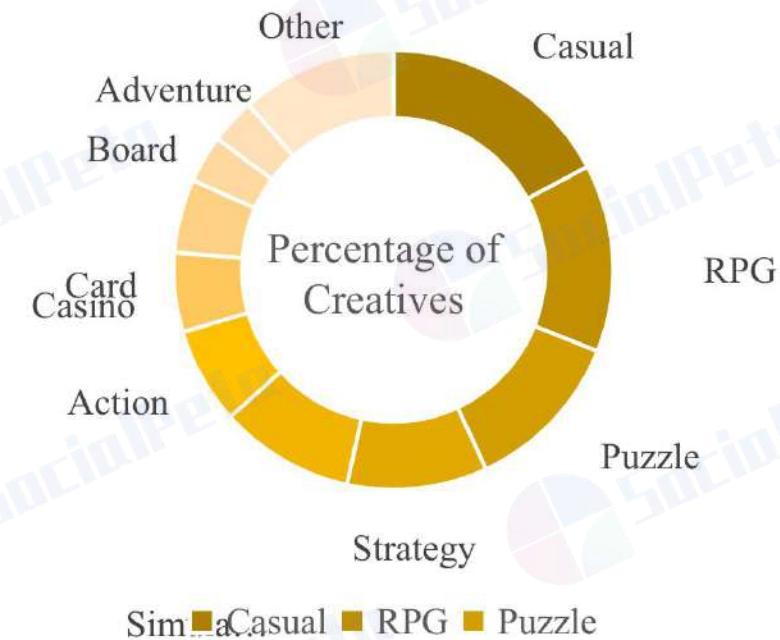


**Compared to 2021, action game advertisers declined significantly; RPG game creatives dropped to No.2 on the chart**

There were over 34,500 casual game advertisers, the highest number among other game genres, accounting for 25.6%; followed by puzzle and simulation games, which accounted for 11.83% and 9.57%, respectively.



Casual games contributed the most creatives, accounting for 17.23%; followed by creatives for RPGs, which were 1.97 million, with about 10,800 advertisers.



# Top Game Streamers on Instagram



## Richard Gomes

Followers: 631K  
Engagement Rate: 6.7%  
Region: Brazil; Portuguese  
Suggested Collaboration Cost per Video: \$2272

1



## pochette

Followers: 55.4K  
Engagement Rate: 4.9%  
Region: Japan; Japanese  
Suggested Collaboration Cost per Video: \$786

2



## Jeremy (Terminalmontage)

Followers: 8.59k  
Engagement Rate: 8.5%  
Region: USA; Klingon  
Suggested Collaboration Cost per Video: \$1394

3



## rickyedit

Followers: 579K  
Engagement Rate: 4.6%  
Region: Spain; English  
Suggested Collaboration Cost per Video: \$1648

4



## aztecrossgaming

Followers: 48.2K  
Engagement Rate: 3.7%  
Region: USA; English  
Suggested Collaboration Cost per Video: \$246

5

# Top 10 Game Advertisers on Google Platforms



TOP 1	
TOP 2	
TOP 3	

Admob		
1		Genshin Impact miHoYo Adventure
2		Mobile Legends Moonton MOBA
3		Evony Top Games SLG
4		PUBG MOBILE Level Infinite Shooter
5		Garena Free Fire GARENA Shooter
6		Sudoku Learnings Puzzle
7		Hero Wars Nexters RPG
8		Coin Master Moon Active Party
9		Happy Color® X-Flow Coloring
10		Mafia City Yotta Games SLG

YouTube		
1		Genshin Impact miHoYo Adventure
2		PUBG MOBILE Level Infinite Shooter
3		Mobile Legends Moonton MOBA
4		Garena Free Fire GARENA Shooter
5		Call of Duty®: Mobile Tencent & Activision Blizzard Shooter
6		League of Legends Riot Games MOBA
7		Roblox Roblox Sandbox
8		奇蹟MU：正宗續作 Ourpalm MMO
9		永夜星神 SpringGame MMO
10		Candy Crush Saga King Match-3

# Analysis of Mobile Game Advertising on Google Platforms

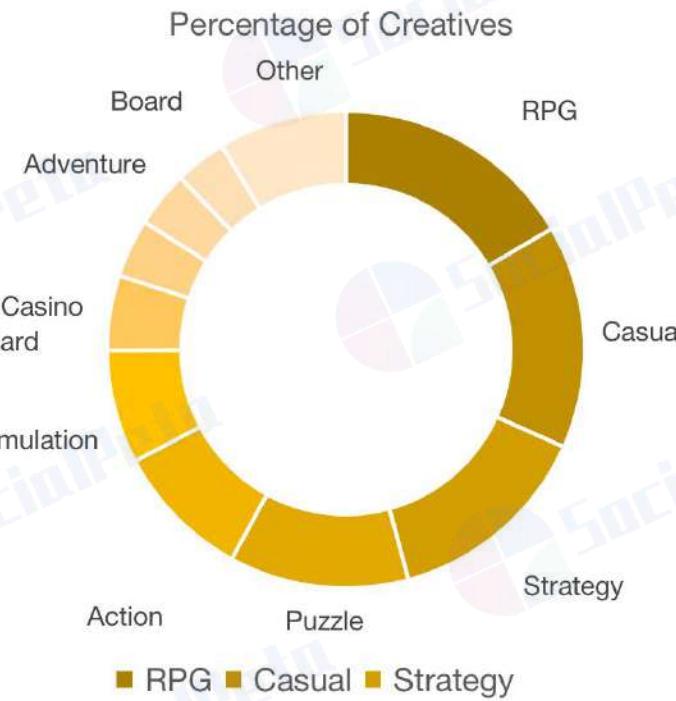


**Casual puzzle games contributed the most advertisers, while RPGs have the most creatives.**

There were over 3,900 casual game advertisers, the highest number among other game genres, accounting for 18.7%; followed by puzzle and simulation game advertisers, which accounted for 12.36% and 10.07%, respectively.



RPGs contributed the most creatives, over 1.01 million, accounting for 16.56%, and about 2,300 advertisers.



# Analysis of Mobile Game Advertising on Admob Platforms



**Total creatives: 579.2K; Monthly creatives: 166K**

**Total advertisers: 17.2K; Monthly advertisers: 8.5K**

Compared to 2021, the number of advertisers surged to a peak in Q2, forming a trend that was the same as in 2021.

The number of creatives surged in April, then slumped to the bottom and rebounded in May.

Compared to a gentle fluctuation in 2021, the overall number of creatives rose to experience a more drastic fluctuation in 2022.



# Top Game Streamers on YouTube



## invictor

Subscribers: 17.5M  
Views per Video: 3.19M  
Region: Spain; Spanish  
Suggested Collaboration Cost per Video: \$37282

1



## Techno Gamerz

Subscribers: 27.1M  
Views per Video: 8.13M  
Region: India; English  
Suggested Collaboration Cost per Video: \$32813

2



## Beluga

Subscribers: 8.59M  
Views per Video: 4.26M  
Region: USA; English  
Suggested Collaboration Cost per Video: \$116019

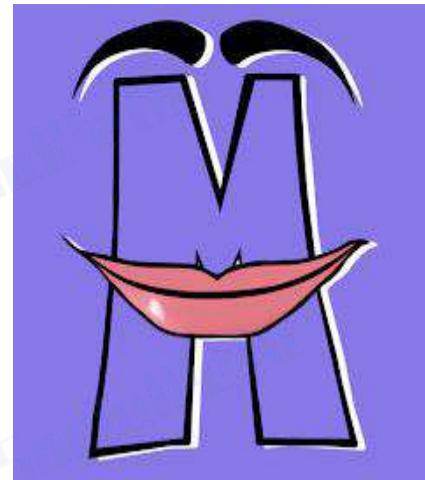
3



## Mohak Meet

Subscribers: 5.09M  
Views per Video: 0.99M  
Region: India; Hindi  
Suggested Collaboration Cost per Video: \$2390

4



## Mythpat

Subscribers: 12.1M  
Views per Video: 4.8M  
Region: India; English  
Suggested Collaboration Cost per Video: \$18227

5

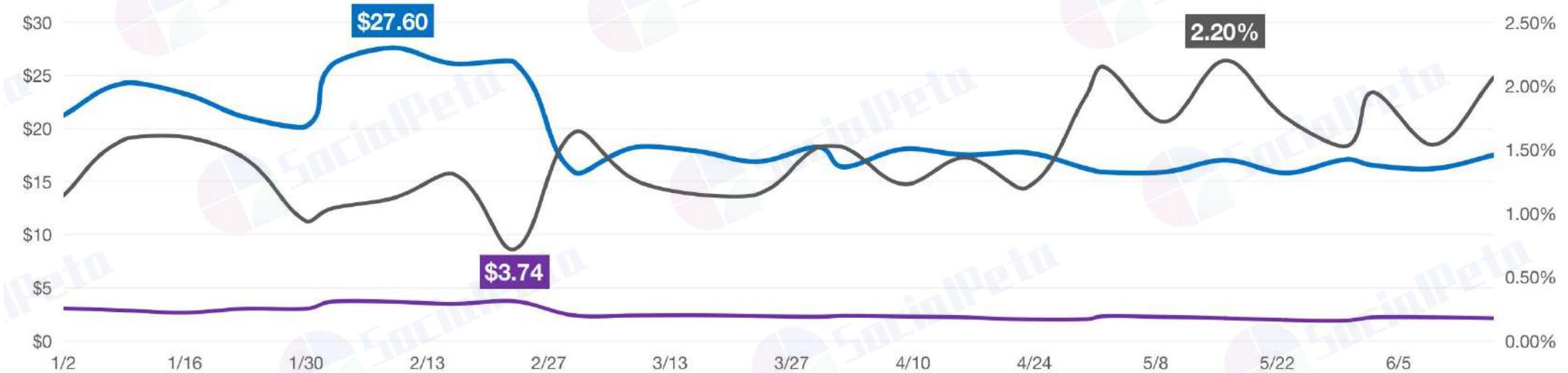


# Advertising Cost of Global Mobile Games

# Mobile Games' Cost Trends



Advertising cost kept rising; mobile games had a CPM of \$19.31, up 18% MoM.



**CPM**  
\$19.31 MoM↑18%



**CPC**  
\$2.57 MoM↓3%



**CTR**  
1.48% MoM↑7%

# Mobile Games' Cost Trends



**CPM in USA remained Top 1**

**CPM was over \$20 in all top 10 countries/regions**

Mobile games in USA had the highest advertising cost, with an average CPM of \$27.54, CPC of \$4.22, CTR of 1.16%.

In addition to the USA, CPM surpassed \$25 in the 5 countries/regions including Australia, Japan, Hong Kong (China), and South Korea.

Japan had the highest advertising cost among all the other countries/regions in Asia Pacific, followed by Hong Kong (China) where the CPM beat that in South Korea to become the second highest in Asia Pacific.

Country/Region	CPM (\$)	CPC (\$)	CTR (%)
USA	27.54	4.22	1.16
Australia	26.9	3.99	1.16
Japan	25.93	3.94	0.93
Hong Kong (China)	25.33	3.75	1.06
South Korea	25.13	3.77	1.03
Taiwan (China)	24.42	3.85	0.89
Canada	23.27	3.55	1
Singapore	21.26	2.66	1.59
UK	20.71	3.23	1.32
Germany	20.42	2.78	1.6

Sorted by CPM from high to low

# Mobile Games' Cost Trends



Strategy games had the highest average CPM

iOS had a slightly higher advertising cost, with an average CPM that was 15% higher than Android.



iOS

CPM: \$20.08  
CPC: \$2.69  
CTR: 1.48%



Android

CPM: \$17.46  
CPC: \$2.4  
CTR: 1.47%

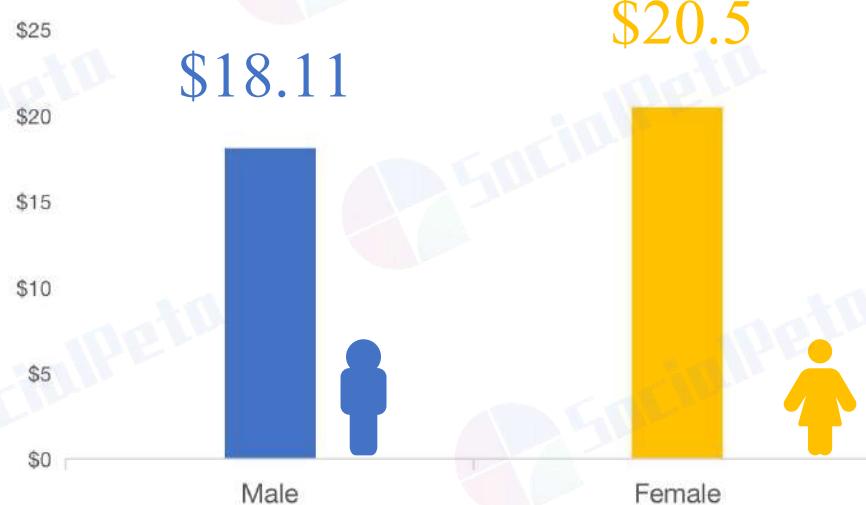
Game Genre	CPM (\$)	CPC (\$)	CTR (%)
Casual	17.44	2.91	1.73
Puzzle	18.47	2.95	1.28
RPG	14.73	2.06	1.45
Strategy	21.58	2.99	1.39
Simulation	19.22	2.98	1.49
Action	10.51	1.25	1.33
Casino	12.79	1.28	1.68
Card	16.13	1.82	1.59
Board	7.7	0.6	1.71
Adventure	20.85	2.48	1.44

# Mobile Games' CPM Trends



**Female users' CPM was 13.2% higher than that of male users. People aging 55-64 had the highest average CPM**

Mobile games' CPM by user gender



Users' CPM by age range

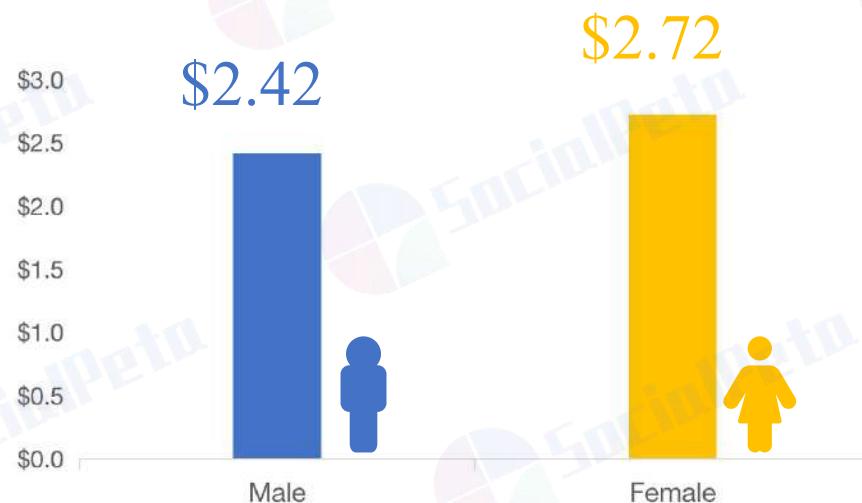


# Mobile Games' CPC Trends



**Female users' CPC was 12.4% higher than that of male users. People aging 35-44 had the highest average CPC**

Mobile games' CPC by user gender



Users' CPC by age range

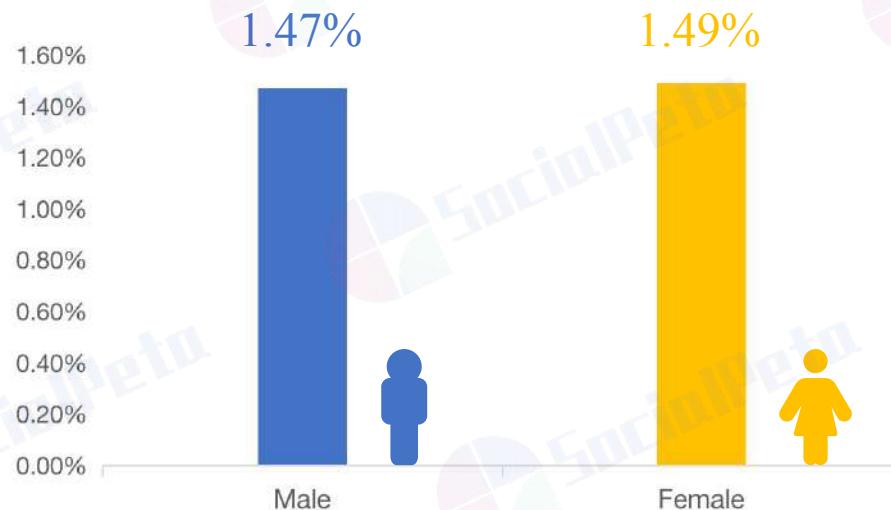


# Mobile Games' CTR Trends

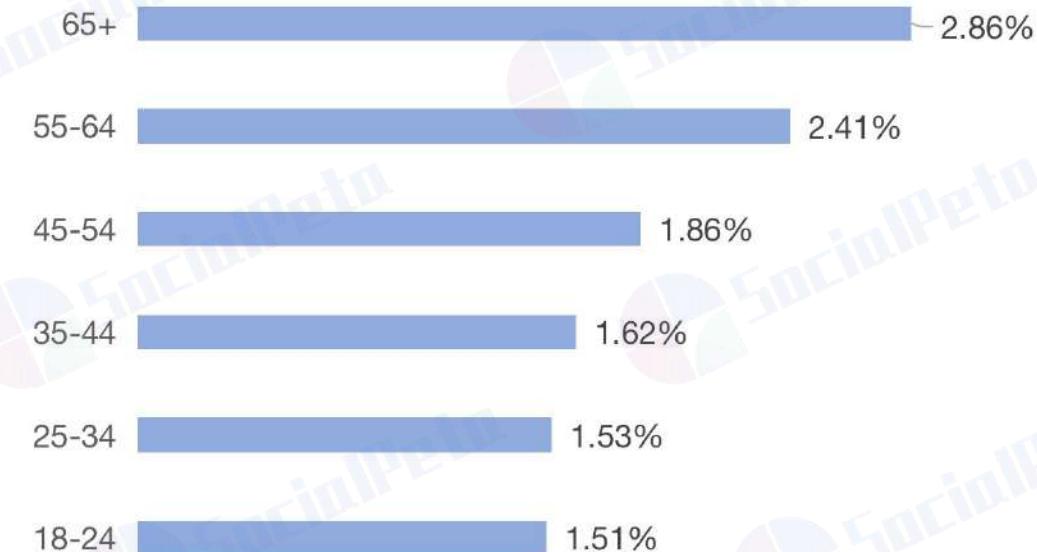


No much difference in the CTR of different genders; CTR was directly proportional to ages.

Mobile games' CTR by user gender



Users' CPR by age range

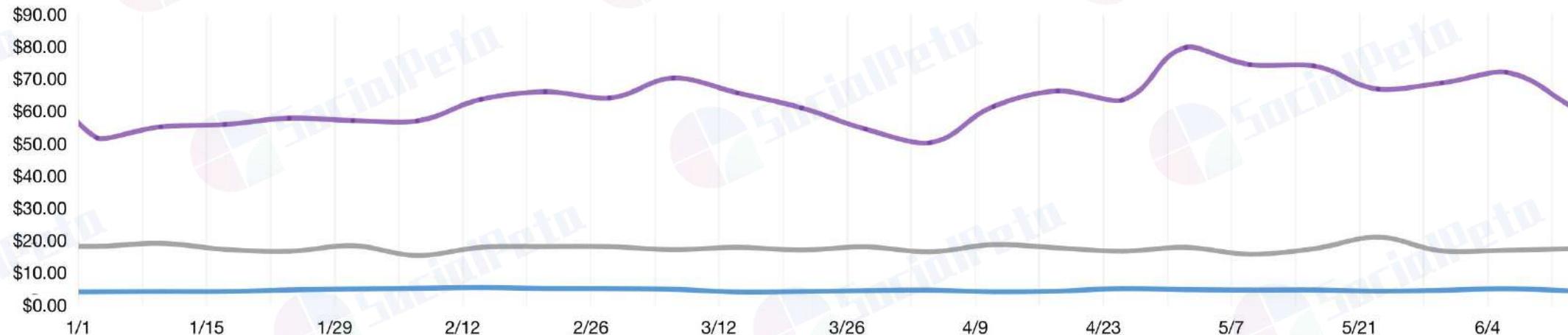


# Mobile Games' CPA Trends



**Highest average installment amount is \$5.4**

The curves show that there wasn't much change in the costs of installment, purchase, and add to cart in H1 2022, and CPA in Q2 was slightly higher than that in Q1



**Installment**

Average: \$4.61



**Purchase**

Average: \$17.61



**Add to Cart**

Average: \$64.98

# Mobile Games' CPI Trends

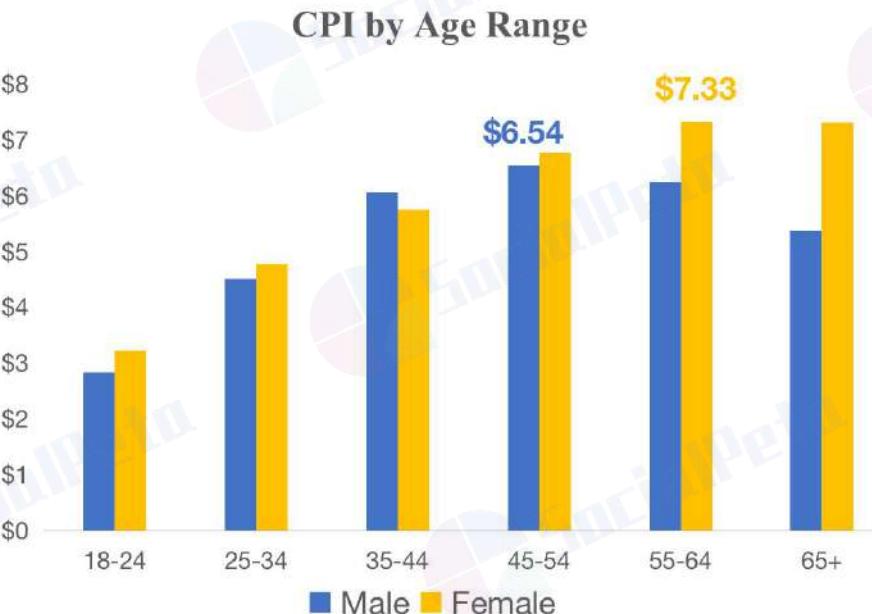


**South Korea had the highest CPI in the world, which was averagely \$13.9**

CPI in Asia Pacific was much higher than in other regions. Asia Pacific occupied 6 spots in the top 10 countries/regions by CPI.

For males, the highest CPI is \$6.54 in the age range of 45-54;

For females, the highest CPI is \$7.33 in the age range of 55-64.



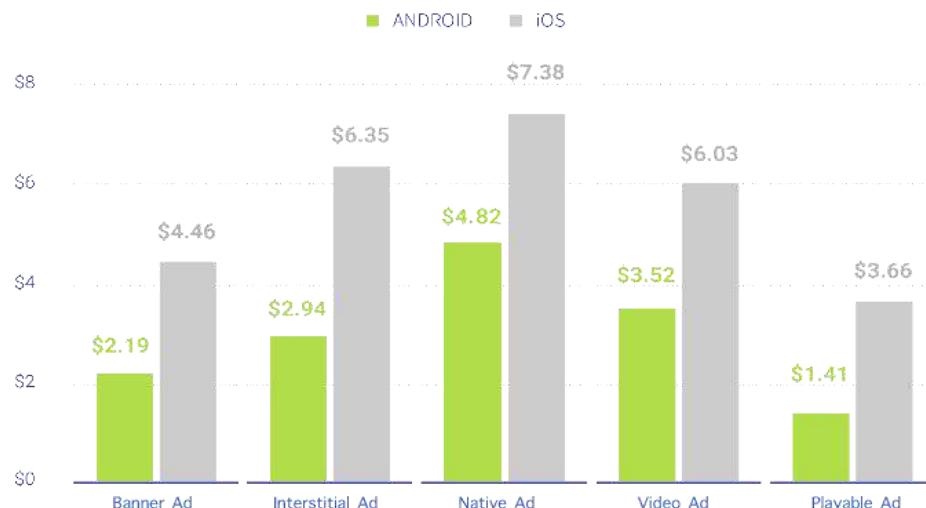
## CPI in Different Countries/Regions



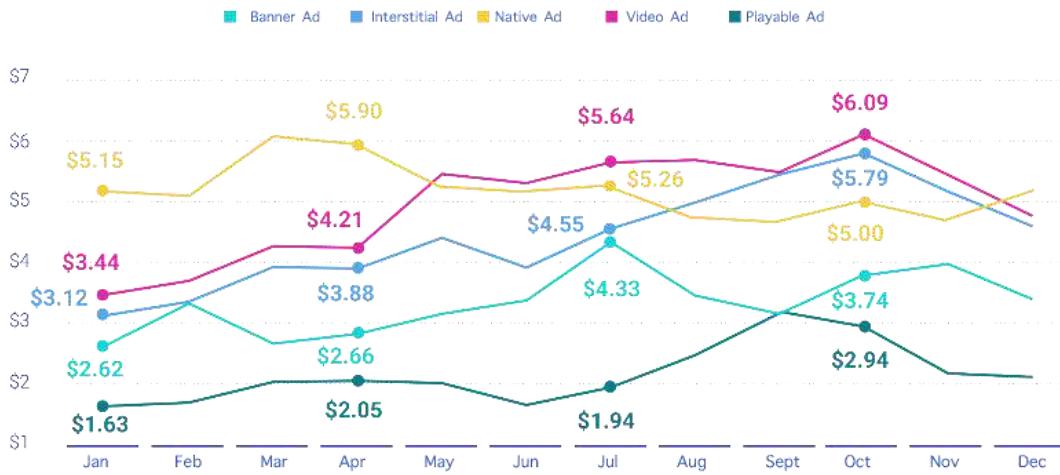
# CPI of Different Ad Formats



## Operating Systems: Android vs iOS



- Playable ads provide the highest value for game marketers, followed by banner ads.
- All ad formats on Android devices cost less. Banner ads, interstitial ads, and playable ads cost over 2 times more on iOS than on Android.

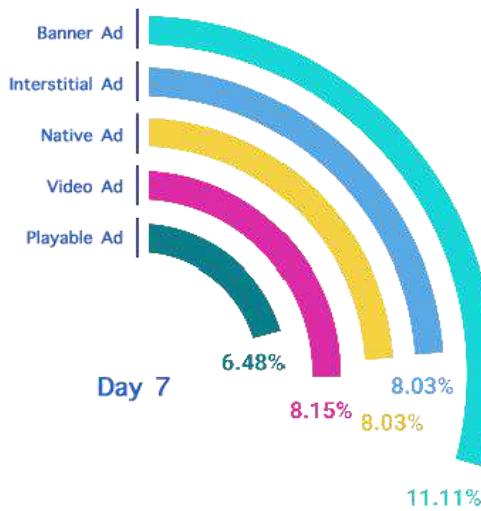


- Though native advertising is the most expensive among all advertising formats, its cost remained stable throughout the year.
- Except September, playable ads were the highest cost-effective.
- During the year, CPI increased for almost all ad formats, with CPI for video ads increasing from \$3.44 to \$6.09. Native advertising was the only exception.

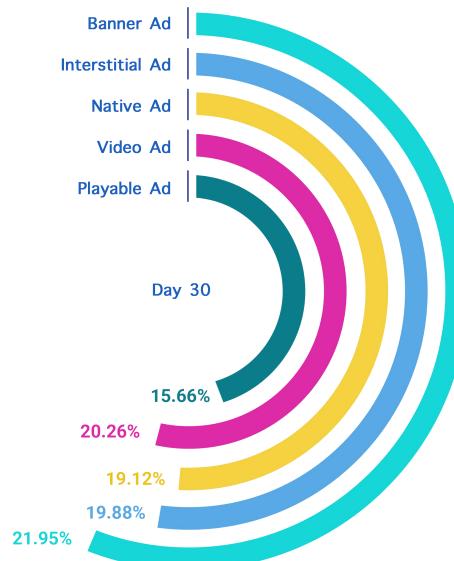
# ROAS of Different Ad Formats



## ROAS on Day 7



## ROAS on Day 30



- Playable ad has the lowest CPI and also the lowest Return On Advertising Spend (ROAS).
- Banner ad has the second lowest CPI but the highest ROAS.
- Native ad had a higher CPI (\$5.22) than interstitial ad (\$4.67), but they had the same ROAS on day 7 and very similar ROAS on day 30.

Ad creatives are the pillar of mobile marketing. As a leading growth acceleration platform in the industry, Liftoff supports mainstream ad formats with its strong creatives service team who are experts in handling the best advertising creatives and localization of various vertical fields. So far Liftoff's creative team has run A/B tests for over 45,000 advertising creatives, each successful test has improved the advertising effect by 12% - 51%. Vungle's Vungle Creative Labs is a professional creative team of nearly 40 talents in creatives, including designers, artists, creative engineers, and data analysts, capable of designing and optimizing advertising creatives based on data.

Liftoff recently launched the program of optimizing and testing multiple creatives, an effective way to reduce test cost and meanwhile greatly increase the test quantity and speed. It can help customers increase ITI by 40%, reduce CPI by 15%, and reduce average CPA by 10% compared to A/B test, offering the best advertising effect.



# Marketing Analysis of Popular Game Genres

# Top Strategy Games by Advertising



1		<b>The Ants</b> StarUnion	SLG
2		<b>State of Survival</b> FunPlus	SLG
3		<b>歡樂大東家</b> EWORLD	Business
4		<b>The Grand Mafia</b> Yotta Games	SLG
5		<b>Rise of Kingdoms</b> Lilith Games	SLG
6		<b>Mafia City</b> Yotta Games	SLG
7		<b>蟻族奇兵AntWars</b> Eskyfun	SLG
8		<b>Kingdom Guard</b> Tap4Fun	SLG
9		<b>Rabbit Empire</b> Yojoy Game	Idle
10		<b>Evony</b> Top Games	SLG
11		<b>Last Fortress</b> IM30	SLG
12		<b>Rise of Empires</b> IM30	SLG
13		<b>Idle Heroes</b> DH Games	RPG
14		<b>Apex Legends Mobile</b> Electronic Arts	Action
15		<b>Puzzles &amp; Survival</b> 37Games	SLG
16		<b>Nonstop Game: Idle RPG</b> Seven Pirates	RPG
17		<b>Warpath: Ace Shooter</b> Lilith Games	SLG
18		<b>Age of Origins</b> Camel Games	SLG
19		<b>Magic: The Gathering Arena</b> Wizards of the Coast	Card
20		<b>Demon God</b> Junhai Games	RPG



1		<b>The Grand Mafia</b> Yotta Games	SLG
2		<b>Lords Mobile</b> IGG	SLG
3		<b>Kingdom Guard</b> Tap4Fun	SLG
4		<b>Rise of Kingdoms</b> Lilith Games	SLG
5		<b>Rise of Empires</b> IM30	SLG
6		<b>The Ants</b> StarUnion	SLG
7		<b>Puzzles &amp; Survival</b> 37Games	SLG
8		<b>Last Shelter</b> IM30	SLG
9		<b>Mafia City</b> Yotta Games	SLG
10		<b>Last Fortress</b> IM30	SLG
11		<b>State of Survival</b> FunPlus	SLG
12		<b>Top War</b> RiverGame	SLG
13		<b>Warpath: Ace Shooter</b> Lilith Games	SLG
14		<b>Evony</b> Top Games	SLG
15		<b>Land of Empires</b> 朝夕光年	SLG
16		<b>Rush Royale</b> MY.COM	Tower Defense
17		<b>Three Kingdoms</b> 必可游戏	SLG
18		<b>World of Tanks Blitz</b> Wargaming Group	Shooter
19		<b>Chief Almighty</b> Yotta Games	SLG
20		<b>Empire: Rising Civilizations</b> OneGame	SLG

# Top Strategy Games by Download & Revenue



## Download

1		<b>Clash Royale</b> Supercell	Card
2		<b>PUBG MOBILE</b> Level Infinite	Shooter
3		<b>Pokémon GO</b> Niantic	RPG
4		<b>Clash of Clans</b> Supercell	SLG
5		<b>Pokémon UNITE</b> The Pokemon Company	MOBA
6		<b>State of Survival</b> FunPlus	SLG
7		<b>Woodoku</b> Tripledot Studios	Puzzle
8		<b>Top War</b> RiverGame	SLG
9		<b>Mighty Party</b> Panoramik Games	Strategy
10		<b>Evony</b> Top Games	SLG

## Revenue

1		<b>Pokémon GO</b> Niantic	RPG
2		<b>Clash of Clans</b> Supercell	SLG
3		<b>PUBG MOBILE</b> Level Infinite	Shooter
4		<b>Clash Royale</b> Supercell	Card
5		<b>State of Survival</b> FunPlus	SLG
6		<b>Knives Out</b> NetEase Games	Shooter
7		<b>Puzzles &amp; Survival</b> 37Games	SLG
8		<b>Top War</b> RiverGame	SLG
9		<b>Mafia City</b> Yotta Games	SLG
10		<b>Lords Mobile</b> IGG	SLG

## Download

1		<b>Lords Mobile</b> IGG	SLG
2		<b>Evony</b> Top Games	SLG
3		<b>Clash of Clans</b> Supercell	SLG
4		<b>Plants vs. Zombies</b> ELECTRONIC ARTS	Tower Defense
5		<b>Stick War: Legacy</b> Max Games Studios	Strategy
6		<b>Clash Royale</b> Supercell	Card
7		<b>Crazy Car Stunts 3D</b> Multi Tech Apps	Racing
8		<b>State.io</b> CASUAL AZUR GAMES	io
9		<b>Crazy Car Driving</b> Jima Apps	Racing
10		<b>Modern Rickshaw Driving Games</b> Jima Apps	Simulation

## Revenue

1		<b>Lords Mobile</b> IGG	SLG
2		<b>State of Survival</b> FunPlus	SLG
3		<b>Clash of Clans</b> Supercell	SLG
4		<b>Rise of Kingdoms</b> Lilith Games	SLG
5		<b>Top War</b> RiverGame	SLG
6		<b>Mafia City</b> Yotta Games	SLG
7		<b>Puzzles &amp; Survival</b> 37Games	SLG
8		<b>Last Shelter</b> IM30	SLG
9		<b>King of Avalon</b> FunPlus	SLG
10		<b>Clash Royale</b> Supercell	Card

# Trends of Strategy Mobile Game Creatives in H1 2022



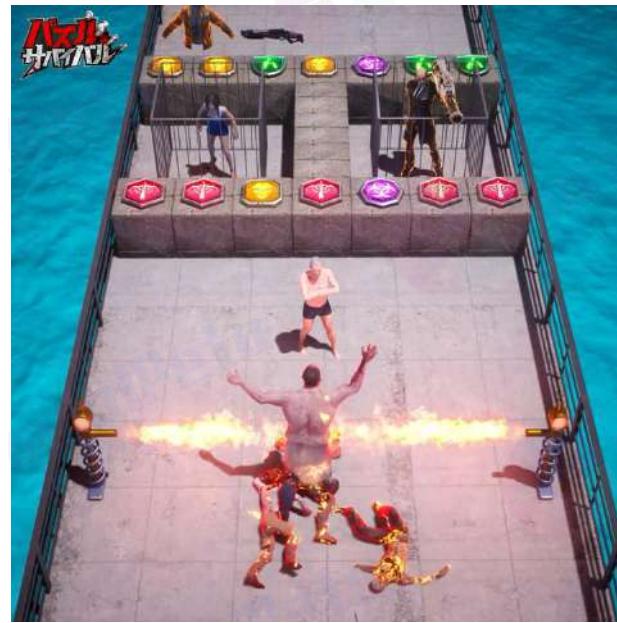
## Strategy mobile game creatives are designed with a lightweight gameplay

Recently, strategy mobile games would add some casual or puzzle gameplays, such as [snake](#), [matching](#), and [merge](#), trying to attract more gamers by featuring “less difficult to start” and “entertaining”.

Usually these games' creatives would include guidance of options to be made, and changing numbers or forced failures would be used to attract people to download and play the games.



Puzzles & Survival



[Click to play](#)



The Grand Mafia



[Click to play](#)



Lords Mobile



[Click to play](#)

# Popular Strategy Mobile Game: State of Survival



Post-Apocalyptic Strategy

- Total Duration (in days): 1000+
- H1 Estimated Revenue: \$21M
- H1 Estimated Downloads: 12M
- Top Counties/Regions by Advertising:  
USA, Australia, Canada, UK, Germany

[State of Survival] Advertising Trends in H1 2022

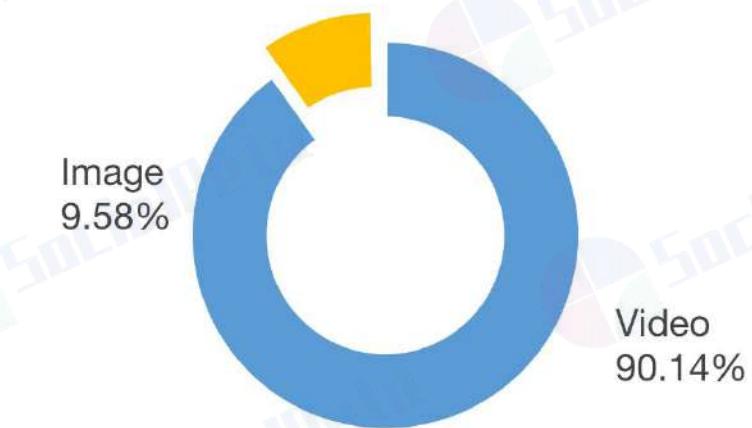


# Popular Strategy Mobile Game: State of Survival



[Click to play](#)

Over 90% creatives in H1 were video creatives.



The creatives often start with **daily life scenarios**, such as: doing housework, watching a movie, taking a shower, catching a bus to school, etc.

# Top RPGs by Advertising in H1 2022



iOS

1		<b>Evertale</b>	ZigZaGame	Adventure
2		<b>State of Survival</b>	FunPlus	SLG
3		<b>聖樹喚歌</b>	新连信息	Idle
4		<b>Rise of Kingdoms</b>	Lilith Games	SLG
5		<b>AZUREA-空 噴-</b>	Zlongame	SLG
6		<b>蟻族奇兵AntWars</b>	Eskyfun	SLG
7		<b>永夜星神</b>	SpringGame	MMO
8		<b>Evony</b>	Top Games	SLG
9		<b>吞食天地3:放置版</b>	9Splay	Idle
10		<b>Legend of the Phoenix</b>	Modo Global	Palace

11		<b>DK Mobile</b>	NTRANCE	MMO
12		<b>Idle Heroes</b>	DH Games	Idle
13		<b>Rise of Empires</b>	IM30	SLG
14		<b>奇蹟MU: 正宗續作</b>	Ourpalm	MMO
15		<b>Hero Wars</b>	NEXTERS	RPG
16		<b>一念逍遙</b>	Leiting Games	Idle
17		<b>聖鑰</b>	SpringGame	MMO
18		<b>Puzzles &amp; Survival</b>	37Games	SLG
19		<b>花舞宮廷</b>	Origin Mood	Palace
20		<b>Nonstop Game: Idle RPG</b>	Seven Pirates	Idle



Android

1		<b>聖鑰</b>	SpringGame	MMO
2		<b>花舞宮廷</b>	Origin Mood	Palace
3		<b>Mythic Heroes</b>	IGG	Idle
4		<b>Time Princess</b>	IGG	Dress up
5		Kakao		Action
6		<b>聖樹喚歌</b>	新连信息	Idle
7		<b>奇蹟MU: 正宗續作</b>	Ourpalm	MMO
8		<b>Mighty Party</b>	Panoramik Games	Strategy
9		<b>一念逍遙</b>	Leiting Games	Idle
10		<b>Legend of Emperor</b>	HEYYO GAME	Palace
11		<b>戀戀清庭:邂逅</b>	Ludoo Games	Palace
12		<b>ເພລກຮະບັນມາວ</b>	Century UU	MMO
13		<b>封神异世录 (国际版)</b>	Junhai Games	MMO
14		<b>Mirage</b>	Eyougame	MMO
15		<b>Escape</b>	Crazy Maple Studio	Romance
16		<b>Nonstop Game: Idle RPG</b>	Seven Pirates	Idle
17		<b>2X</b>	U.LU	MMO
18		<b>MU ORIGIN 3</b>	Ourpalm	MMO
19		<b>Epic Seven</b>	Smilegate Megaport	Card
20		<b>Perfect World VNG</b>	Tencent Games	MMO

# Top RPGs by Download & Revenue in H1 2022



## ⤓ Download

1		<b>Pokémon GO</b>	RPG
2		<b>My Talking Angela 2</b>	Simulation
3		<b>Genshin Impact</b>	Adventure
4		<b>My Talking Tom 2</b>	Simulation
5		<b>State of Survival</b>	SLG
6		<b>Top War</b>	SLG
7		<b>My Talking Tom</b>	Simulation
8		<b>100 Years</b>	Simulation
9		<b>Mighty Party</b>	Strategy
10		<b>Evony</b>	SLG

## ⤓ Revenue

1		<b>Pokémon GO</b>	RPG
2		<b>Genshin Impact</b>	Adventure
3		<b>XFLAG</b>	Puzzle
4		<b>GungHo</b>	Puzzle
5		<b>State of Survival</b>	SLG
6		<b>Fate/Grand Order</b>	Card
7		<b>Rise of Kingdoms</b>	SLG
8		<b>Puzzles &amp; Survival</b>	SLG
9		<b>Top War</b>	SLG
10		<b>SQUARE ENIX</b>	RPG

## ⤗ Download

1		<b>Cat Runner</b>	Parkour
2		<b>Miami Rope Hero</b>	Action
3		<b>Hair Dye</b>	Hyper-Casual
4		<b>Foot Clinic</b>	Hyper-Casual
5		<b>Bus Simulator</b>	Simulation
6		<b>Fashion Battle</b>	Hyper-Casual
7		<b>Coach Bus Driving Simulator 3D</b>	Simulation
8		<b>Icing On The Dress</b>	Hyper-Casual
9		<b>Mighty Party</b>	Strategy
10		<b>Special Ops 2020</b>	Shooter

## ⤗ Revenue

1		<b>Odin: Vikings in Valhalla</b>	MMO
2		<b>M</b>	MMO
3		<b>Fate/Grand Order</b>	Card
4		<b>RAID</b>	RPG
5		<b>Hero Wars</b>	RPG
6		<b>SQUARE ENIX</b>	RPG
7		<b>2</b>	MMO
8		<b>MARVEL Strike Force</b>	RPG
9		<b>Summoners War</b>	RPG
10		<b>4399</b>	MMO

# Trends of RPG Creatives in H1 2022



RPG creatives were **mostly short videos**, attempting to make the games **a more popular topic of conversation on the platforms**.

RPGs are mostly hardcore. To attract gamers' attention, RPG creatives are generally about stories or contents of the games. With the great popularity of short video apps, advertisers started to design high-quality short video creatives, mainly including **fake VLOG**, **short plays by influencers**, **game stories acted out by real people, etc.**, taking advantage of short-video platforms to improve creatives' impressions and games' popularity.



LifeAfter



[Click to play](#)



Thân Vương Chi Mộng



[Click to play](#)



Episode



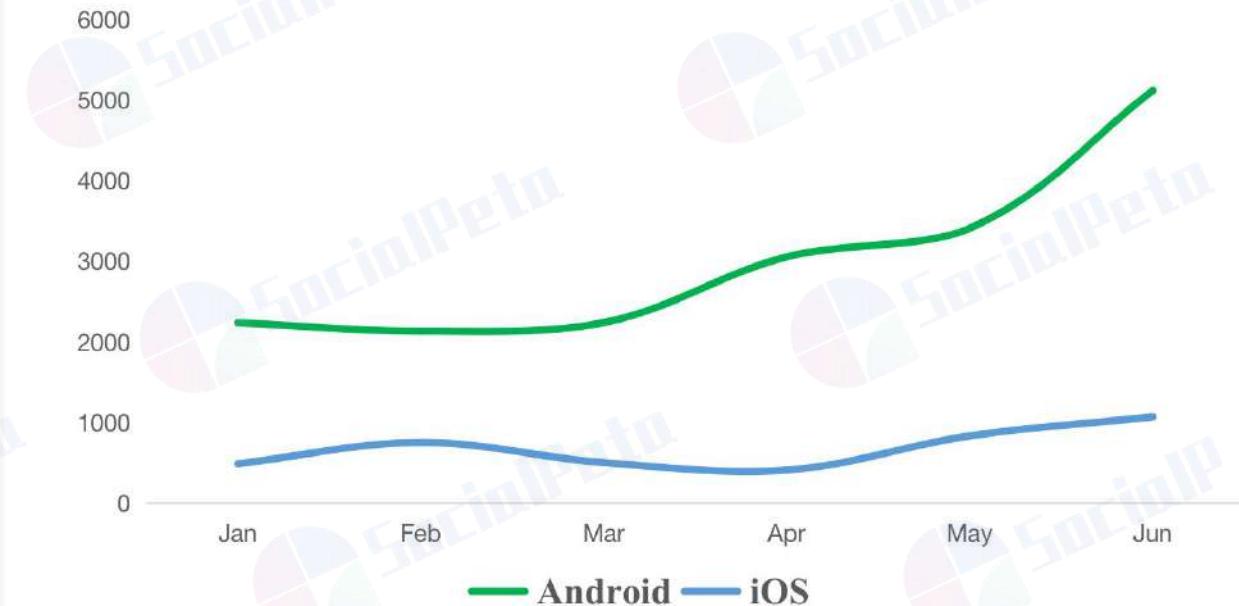
[Click to play](#)

# Popular RPG: Genshin Impact



- Total Duration (in days): 600+
- H1 Estimated Revenue: \$390M
- H1 Estimated Downloads: 19M
- Top Countries/Regions by Advertising:  
USA, Australia, Canada, UK, Germany

[Genshin Impact] Advertising Trends in H1 2022



# Popular RPG: Genshin Impact



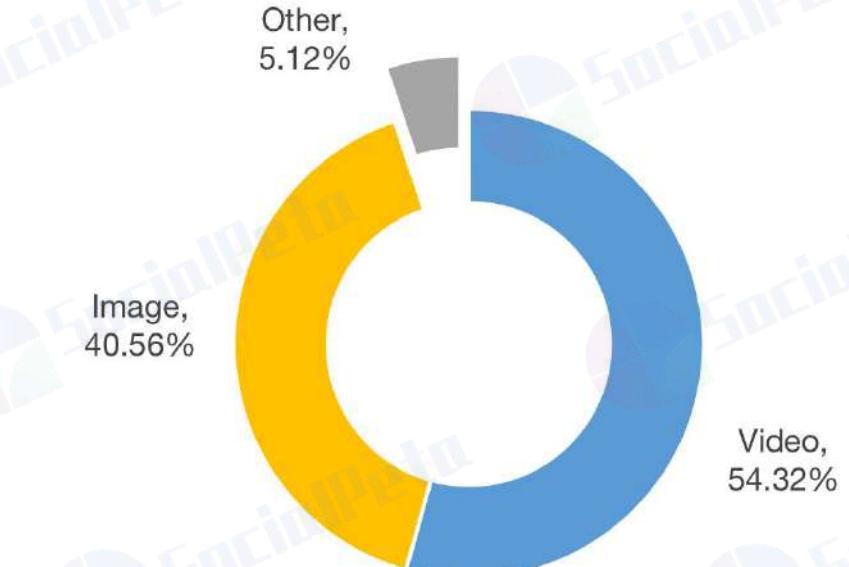
## [Genshin Impact]

Started to release [ads with commentary](#), adding contents such as [“ranking” matches](#) or something like that.



[Click to play](#)

Over **54%** creatives in H1 were **video** creatives.



# Top Simulation Games by Advertising in H1 2022



1	<b>Fishdom</b> Playrix	Farming
2	<b>The Ants</b> StarUnion	SLG
3	<b>歡樂大東家</b> EWORLD	Business
4	<b>Resortopia</b> DH Games	Business
5	<b>Purrfect Tale</b> DH Games	Business
6	<b>Homescapes</b> Playrix	Puzzle
7	<b>Animal Restaurant</b> DH Games	Business
8	<b>Township</b> Playrix	Farm
9	<b>Family Farm Adventure</b> Century Games	Farm
10	<b>Last Fortress</b> IM30.NET	SLG

11	<b>Mega Tower</b> Youloft Tech	Tower Defense
12	<b>Legend of the Phoenix</b> Modo Global	Palace
13	<b>盛世芳華</b> Huoyu Game	Palace
14	<b>花舞宮廷</b> Origin Mood	Palace
15	<b>FIFA Soccer</b> Electronic Arts	Sports
16	<b>Klondike Adventures</b> VIZOR APPS	Farm
17	<b>Idle Magic Academy</b> Longgames	Idle
18	<b>叫我大掌櫃</b> 37Games	Business
19	<b>Train Station 2</b> Pixel Federation	Building
20	<b>Trading Legend</b> 37Games	Business



1	<b>Camping Tycoon</b> SONOW	Business
2	<b>Office Fever</b> Rolleic	Hyper-Casual
3	<b>Family Farm Adventure</b> Century Games	Farm
4	<b>Case Hunter</b> EYEWIND	Puzzle
5	<b>歡樂大東家</b> EWORLD	Business
6	<b>Merge Master Blue Monster</b> OneSoft	Merge
7	<b>Makeup Master</b> Button Software	Makeup & Beauty
8	<b>Idle Lumber Empire</b> Game Veterans	Idle
9	<b>TeenPatti Real Poker</b> gaayussu	Card
10	<b>Klondike Adventures</b> VIZOR APPS	Farm
11	<b>Township</b> Playrix	Farm
12	<b>My Fantasy</b> Unicorn Media Apps	Romance
13	<b>Idle Magic School</b> Longgames	Idle
14	<b>Chapters</b> Crazy Maple Studio	Romance
15	<b>Trading Legend</b> 37Games	Business
16	<b>Legend City</b> TeamLOM	SLG
17	<b>Romance Fate</b> BOKE	Romance
18	<b>盛世芳華</b> Huoyu Game	Palace
19	<b>Dragonscapes Adventure</b> Century Games	Farm
20	<b>Animal Restaurant</b> DH Games	Business

# Top Simulation Games by Download & Revenue in H1 2022



## Download

1		<b>Project Makeover</b>	Makeup & Beauty
2		<b>Among Us!</b>	Social deduction
3		<b>8 Ball Pool™</b>	Sports
4		<b>Homescapes</b>	Puzzle
5		<b>My Talking Angela 2</b>	Interactive
6		<b>Fishdom</b>	Farming
7		<b>Township</b>	Farm
8		<b>Ball Run 2048</b>	Hyper-Casual
9		<b>Run Rich 3D</b>	Hyper-Casual
10		<b>Trading Master 3D</b>	Puzzle

## Revenue

1		<b>Homescapes</b>	Puzzle
2		<b>Cygames</b>	Sports
3		<b>Gardenscapes</b>	Puzzle
4		<b>Project Makeover</b>	Makeup & Beauty
5		<b>Fishdom</b>	Farming
6		<b>Township</b>	Farm
7		<b>Cookie Run: Kingdom</b>	Parkour
8		<b>Minecraft</b>	Sandbox
9		<b>Golf Clash</b>	Sports
10		<b>Hay Day</b>	Farm

## Download

1		<b>Fidget Toys Trading</b>	Board
2		<b>Fidget Toys 3D</b>	Hyper-Casual
3		<b>Craftsman: Building Craft</b>	Sandbox
4		<b>Phone Case DIY</b>	Hyper-Casual
5		<b>Sculpt people</b>	Hyper-Casual
6		<b>DIY Makeup</b>	Hyper-Casual
7		<b>Fashion Show</b>	Makeup & Beauty
8		<b>Solar Smash</b>	Strategy
9		<b>Pop It Fidget 3D</b>	Hyper-Casual
10		<b>Jelly Dye</b>	Makeup & Beauty

## Revenue

1		<b>Cygames</b>	Sports
2		<b>Klondike Adventures</b>	Farm
3		<b>Fishing Clash</b>	Sports
4		<b>Fire Emblem Heroes</b>	Strategy
5		<b>Design Home</b>	Decoration
6		<b>Chapters</b>	Interactive Fiction
7		<b>三國志 眇道</b>	Strategy
8		<b>FFBE幻影戦争</b>	Wargame
9		<b>Redecor</b>	Decoration
10		<b>Dragonscapes Adventure</b>	Farm

# Trends of Simulation Mobile Game Creatives



**Simulation games added drama (helping the mother and her kids or the girl) to the creatives.**

Such creatives are usually combined with easier gameplays, such as match-3, merge, numerical selection, etc., using “sympathy” and “newbie friendly” to attract female users.

Some effective and high-quality creatives, such as repairing ratty house for the mother and her kids, have been used as game themes to launch many decoration games.



Family Farm Adventure



[Click to play](#)



Matchington Mansion



[Click to play](#)



My Home



[Click to play](#)

# Popular Simulation Mobile Game: Chapters



- Total Duration (in days): 1700+
- H1 Estimated Revenue: \$12M
- H1 Estimated Downloads: 3.4M
- Top Countries/Regions by Advertising:  
Canada, USA, UK, Germany, France

**[Chapters: Interactive Stories]**  
**Advertising Trends in H1 2022**



# Top Casino Games by Advertising



1	<b>Bingo Clash</b> AviaGames	Bingo
2	<b>Slots GoldenHoYeah</b> IGS	Slots
3	<b>Jackpot World™</b> BoleGaming	Slots
4	<b>Pocket7Games</b> AviaGames	Platform
5	<b>Jackpocket Lottery App</b> Jackpocket	Lottery
6	<b>神來也麻將多合1</b> Gamesofa	Mahjong
7	<b>Four Winds Online Casino MI</b> Four Winds	Slots
8	<b>Solitaire</b> MobilityWare	Card
9	<b>Cash Tornado™</b> Zero Gravity	Slots
10	<b>Jackpot Master™</b> Zero Gravity	Slots

11	<b>RummyCircle</b> PLAY GAMES24X7	Card
12	<b>Cash Party™</b> MIRROR GAMES	Slots
13	<b>滿貫大亨</b> SHIZI TECH	Slots
14	<b>Texas Hold'em Poker</b> KamaGames	Card
15	<b>Solitaire Cash</b> Papaya Gaming	Card
16	<b>Cash O Mania</b> KAKAPO GAMES	Slots
17	<b>金好運娛樂城</b> IGS	Slots
18	<b>Grand Cash</b> Gamehaus	Slots
19	<b>Cash Hoard</b> Hongtqojian	Slots
20	<b>Blackout Bingo</b> Big Run Studios	Bingo



1	<b>Jackpot World™</b> BoleGaming	Slots
2	<b>Lotsa Slots</b> BoleGaming	Slots
3	<b>Cash Frenzy™</b> BoleGaming	Slots
4	<b>Jackpot Master™</b> Zero Gravity	Slots
5	<b>Golden HoYeah</b> IGS	Slots
6	<b>Tongits Go</b> PLAYJOY	Card
7	<b>Jackpot Crush</b> BoleGaming	Slots
8	<b>Cash Bash Casino</b> BoleGaming	Slots
9	<b>Vegas Friends</b> BoleGaming	Card
10	<b>Four Winds Online Casino MI</b> Four Winds	Slots
11	<b>Bingo Frenzy</b> Gluon Interactive	Bingo
12	<b>Cash Tornado™</b> Zero Gravity	Slots
13	<b>Cash Blitz Slots</b> Triwin Games	Slots
14	<b>Jackpot Party</b> SciPlay	Slots
15	<b>DoubleDown</b> DoubleDown	Slots
16	<b>Teen Patti Master</b> RASHMI KUSHWAH	Card
17	<b>Gold Fish</b> SciPlay	Slots
18	<b>Slotomania™</b> Playtika	Bingo
19	<b>Quick Hit</b> SciPlay	Slots
20	<b>Club Vegas Slots</b> Bagelcode	Slots

# Top Casino Games by Download & Revenue



## Download

1		<b>Blackout Bingo</b> Big Run Studios	Bingo
2		<b>Bingo Clash</b> AviaGames	Bingo
3		<b>Solitaire</b> MobilityWare	Card
4		<b>Solitaire Cash</b> Papaya Gaming	Card
5		<b>Solitaire Cube</b> Tether Studios	Card
6		<b>Bubble Cash</b> Papaya Gaming	Puzzle
7		<b>Pocket7Games</b> AviaGames	Platform
8		<b>Zynga Poker</b> Zynga	Card
9		<b>DraftKings</b> DraftKings	Sports
10		<b>World Series of Poker</b> Playtika	Card

## Revenue

1		<b>Slotomania™</b> Playtika	Bingo
2		<b>Bingo Blitz™</b> Playtika	Bingo
3		<b>Jackpot Party</b> Phantom EFX	Bingo
4		<b>DoubleDown™</b> Double Down Interactive	Slots
5		<b>Lightning Link Casino</b> Product Madness	Slots
6		<b>Cashman Casino</b> Product Madness	Slots
7		<b>Heart of Vegas</b> Product Madness	Slots
8		<b>Cash Frenzy™</b> BoleGaming	Slots
9		<b>House of Fun™</b> Playtika	Slots
10		<b>Huuge Casino Slots Vegas 777</b> Huuge Global	Slots

## Download

1		<b>Teen Patti Gold</b> Moonfrog	Card
2		<b>Slotomania™</b> Playtika	Bingo
3		<b>GAMEE Prizes</b> Gamee	Play-to-Earn
4		<b>House of Fun™</b> Playtika	Slots
5		<b>Tongits Go</b> PLAYJOY	Card
6		<b>Jackpot World™</b> BoleGaming	Slots
7		<b>POP! Slots™</b> PlayStudios	Slots
8		<b>Teen Patti Octro</b> Octro	Card
9		<b>Cash Frenzy™</b> BoleGaming	Slots
10		<b>Golden HoYeah</b> IGS	Slots

## Revenue

1		<b>Slotomania™</b> Playtika	Bingo
2		<b>Cash Frenzy™</b> BoleGaming	Slots
3		<b>Huuge Casino Slots Vegas 777</b> Huuge Global	Slots
4		<b>Jackpot Party</b> SciPlay	Slots
5		<b>Lotsa Slots</b> BoleGaming	Slots
6		<b>Jackpot World™</b> BoleGaming	Slots
7		<b>Cashman Casino</b> Product Madness	Slots
8		<b>POP! Slots™</b> PlayStudios	Slots
9		<b>House of Fun™</b> Playtika	Slots
10		<b>Lightning Link Casino</b> Product Madness	Slots

# Trends of Casino Mobile Game Creatives



## Fish catching, beer, gold gush: diversified and with specific prizes

Casino game creatives are mostly about gameplays. The videos usually start with “winning” small prizes, lowering audience's expectations, which are quickly followed by big prizes, giving users a great feeling of achievement.

And the free coins shown in the creatives are the key to attracting gamers to download the games, which are usually in millions.



Show Me Vegas Slots Casino



[Click to play](#)



Wynn Slots



[Click to play](#)



Cash Winner Casino Slots



[Click to play](#)

# Popular Casino Mobile Game: Cash Frenzy™



- Total Duration (in days): 1300+
- H1 Estimated Revenue: \$73M
- H1 Estimated Downloads: 2M
- Top Countries/Regions by Advertising:  
USA, Australia, Canada, UK, France

[Cash Frenzy™]  
Advertising Trends in H1 2022



# Popular Casino Mobile Game: Cash Frenzy™

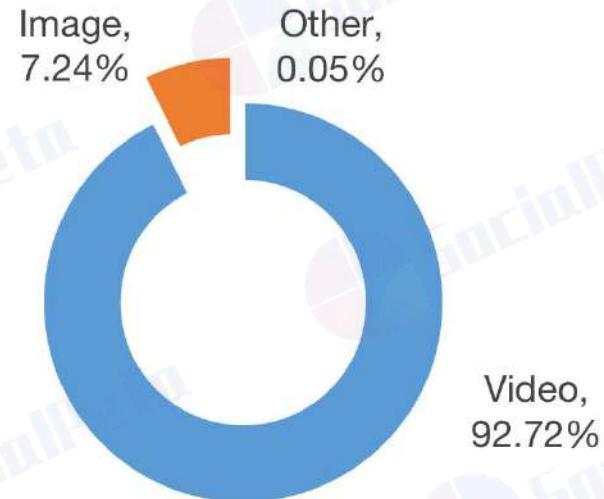


Casino mobile games favor **exaggerated live action** creatives.



[Click to play](#)

Over **92%** creatives in H1 were **video** creatives.



# Top Casual Games by Advertising



iOS

1		<b>Block Puzzle</b> Doodle Mobile	Matching
2		<b>Resortopia</b> DH Games	Business
3		<b>Purrfect Tale</b> DH Games	Business
4		<b>Wordle!</b> Lion Studio	Words
5		<b>Animal Restaurant</b> DH Games	Business
6		<b>Kingdom Guard</b> Tap4Fun	SLG
7		<b>Slots GoldenHoYeah</b> IGS	Slots
8		<b>Rabbit Empire</b> Yojoy Game	Idle
9		<b>The Soul Guardian</b> KONGGAMES	Card
10		<b>Case Hunter</b> EYEWIND	Puzzle

11		<b>Dream Piano</b> Eyugame	Music
12		<b>Find the Difference</b> Cleverside	Puzzle
13		<b>Hidmont</b> Cleverside	Puzzle
14		<b>War Robots Multiplayer</b> Battles	Shooter
15		<b>Bright Objects</b> Cleverside	Puzzle
16		<b>Sniper 3D</b> Wildlife Studios	Simulation
17		<b>Royal Match</b> Dream Games	Match-3
18		<b>Tap Music 3D</b> Eyugame	Music
19		<b>Cross'em All</b> Netmarble	Action
20		<b>Idle Magic Academy</b> Longames	Puzzle



Android

1		<b>Coin Pet</b> ASIA YUTAI NETWORK	Slots
2		<b>Car Fix Tycoon</b> SONOW	Simulation
3		<b>Mafia City</b> Yotta Games	SLG
4		<b>Coin Master</b> Moon Active	Party
5		<b>Homescapes</b> Playrix	Puzzle
6		<b>Rise of Empires</b> IM30.NET	SLG
7		<b>Money Rush</b> Rollic Games	Hyper-Casual
8		<b>Gardenscapes</b> Playrix	Puzzle
9		<b>Mega Tower</b> Youloft Tech	Tower Defense
10		<b>Evony</b> Top Games	SLG

11		<b>Project Makeover</b> Magic Tavern	Makeup & Beauty
12		<b>Crazy Fox</b> ASTAK TECH	Party
13		<b>The Ants</b> StarUnion	SLG
14		<b>Last Shelter</b> IM30.NET	SLG
15		<b>Family Island™</b> Melsoft Games	Farm
16		<b>ColorPlanet®</b> Games Vessel	Coloring
17		<b>Moneyland</b> Rollic Games	Hyper-Casual
18		<b>Paintist Plus</b> ColorFun Apps	Coloring
19		<b>Chapters</b> Crazy Maple Studio	Romance
20		<b>Ball Sort</b> IEC	Hyper-Casual

# Top Casual Games by Download & Revenue



## Download

1	Subway Surfers	Sybo Games	Parkour
2	Count Masters	AIBY	Hyper-Casual
3	Magic Tiles 3	Amanotes	Music
4	Water Sort Puzzle	IEC	Puzzle
5	Candy Crush Saga	King	Match-3
6	Brawl Stars	Supercell	Action
7	Royal Match	Dream Games	Match-3
8	Going Balls	Supersonic	Hyper-Casual
9	Arrow Fest	Rollie Games	Hyper-Casual
10	Ball Run 2048	KAYAC	Hyper-Casual

## Revenue

1	Candy Crush Saga	King	Match-3
2	Coin Master	Moon Active	Party
3	Brawl Stars	Supercell	Action
4	Royal Match	Dream Games	Match-3
5	Toon Blast	Peak Games	Match-3
6	Candy Crush Soda Saga	King	Match-3
7	Empires & Puzzles	Zynga	Match-3
8	Toy Blast	Peak Games	Match-3
9	Farm Heroes Saga	King	Match-3
10	Phase 10: World Tour	Mattel163	Board

## Download

1	Bridge Race	Supersonic	Hyper-Casual
2	My Talking Tom Friends	Outfit7	Simulation
3	Candy Crush Saga	King	Match-3
4	My Talking Angela 2	Outfit7	Simulation
5	My Talking Tom 2	Outfit7	Simulation
6	Going Balls	Supersonic	Hyper-Casual
7	My Talking Angela	Outfit7	Simulation
8	Bubble Shooter	Bubble Shooter	Puzzle
9	Ball Run 2048	KAYAC	Hyper-Casual
10	My Talking Tom	Outfit7	Simulation

## Revenue

1	Coin Master	Moon Active	Slots
2	Candy Crush Saga	King	Match-3
3	Gardenscapes	Playrix	Puzzle
4	Homescapes	Playrix	Puzzle
5	Candy Crush Soda Saga	King	Match-3
6	Township	Playrix	Farm
7	Project Makeover	Magic Tavern	Makeup & Beauty
8	Family Island™	Melsoft Games	Farm
9	Hay Day	Supercell	Farm
10	Best Fiends	Seriously Digital Entertainment	Match-3

# Trends of Hyper-Casual Mobile Game Creatives



A combination of multiple elements makes hyper-casual creatives funnier, arousing users' interest to play the games.

To show how easy they are to play, most creatives of hyper-casual mobile games are about gameplay. The formats are more diverse than other game genres.

Pin pulling puzzles, live action, show-how, contrast, ending in failure are the common patterns used in hyper-casual game creatives which are sometimes added with other elements such as extreme weather conditions and poor leading characters.



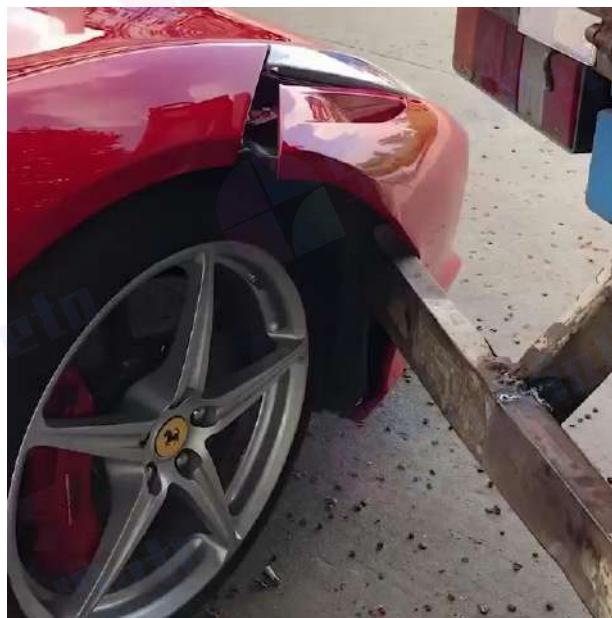
Nail Salon 3D



[Click to play](#)



Drift Park



[Click to play](#)



Wordox



[Click to play](#)

# Popular Hyper-Casual Mobile Game: Brain Out



- Total Duration (in days): 1000+
- H1 Deduplicated Creatives: 7400
- H1 Estimated Downloads: 26M
- Top Countries/Regions by Advertising:  
USA, Canada, France, UK, Taiwan (China)

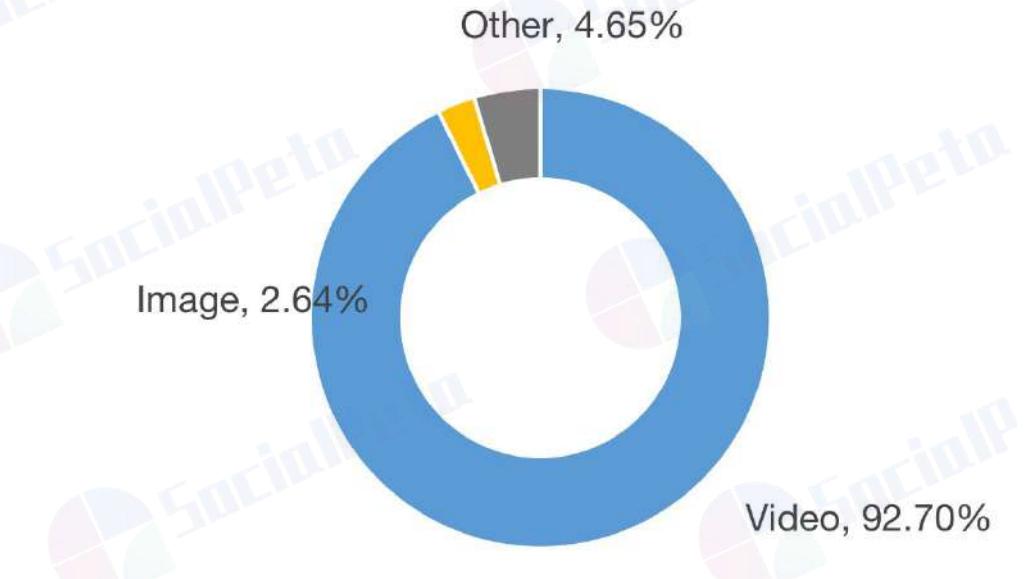
[Brain Out]  
Advertising Trends in H1 2022



# Popular Hyper-Casual Mobile Game: Brain Out



Excellent creatives would be added into the game,  
The game's gameplay and creatives have been updated very quickly.



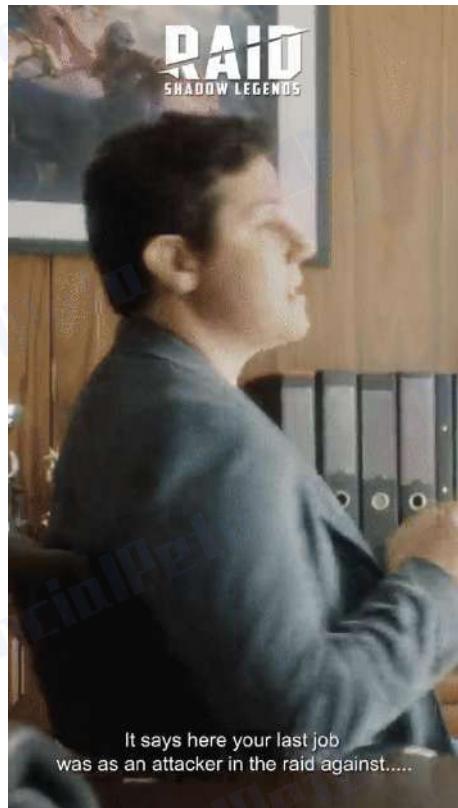


SnapChat

# Trends of Snapchat Mobile Game Creatives

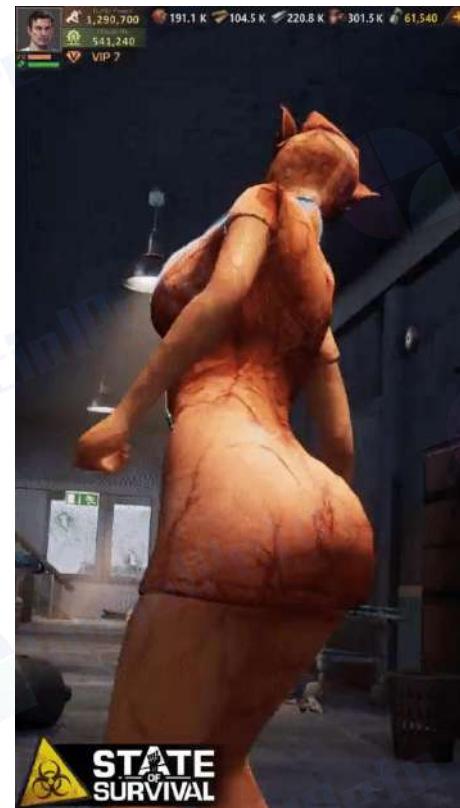
## Multiple Narrative Perspectives

Several ad formats are combined to tell brand stories from multiple narrative perspectives



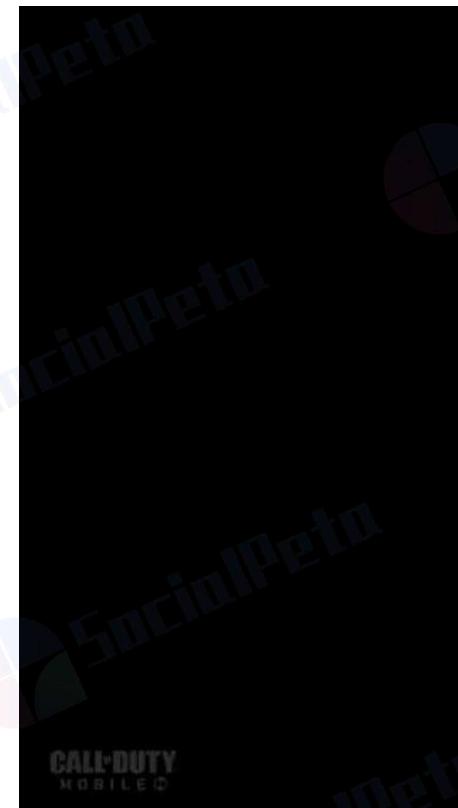
## Immersive Experience

Vivid scenes are recreated for astonishing sensual experience that would make gamers fall for it in no time.



## Interactive Display

Make conversation with gamers to bond with them so they would be more willing to participate.



## AR Brings Characters Back

AR filters allow gamers to become in-game characters, making the games more appealing.



# Snapchat's Golden Rule for Game Creatives



SnapChat

## Instant Impact

Control the length of  
videos/Display key info within  
the first 5 seconds



## Use In-game Characters

Use the characters/content that are  
easy to recognize



## Single Info

Convey simple and clear  
info/CTA is shown directly



## Sound Design

Improve the effect through  
purposeful sound design



# Snapchat's Success Case: CSR 2



SnapChat

CSR 2 worked with Snapchat to simulate CSR car racing in game. The creative team designed a chain of instructions in camera to make it a filter ad that is highly playable and shareable.

**AR Filter**  
Role Playing



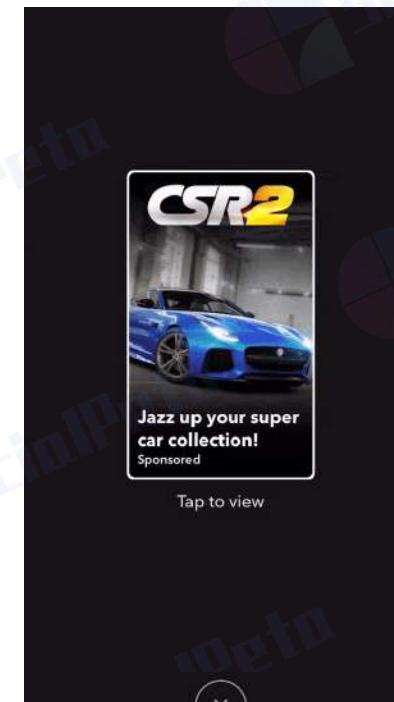
**Snap Ad**  
Gameplay



**Snap Ad**  
Gaming Experience



**Story Ad**  
Story Telling



**Story Ad**  
Game Highlight



# ACGN Games: Originate in Japan, Thrive in China



With mature research, development technologies and strong self-development ability, Chinese ACGN game companies have started to compete globally.

- “Azur Lane” beat “Kantai Collection”, a Japanese game of the same type, to become the top 1 game in the market segment.
- On the first day after its release, the Japanese version of “Arknights” topped the App Store’s free game chart, and its in-game events were well-received.
- “The Divine Damsel of Devastation”, a performance by the character Yun Jin from “Genshin Impact”, went viral on social media, greatly increasing the popularity of Peking Opera among global gamers, becoming a successful example to showcase Chinese culture globally.



# ACGN Games: Big Games are Coming from China



## A large number of ACGN games are under research and development in China

According to the Chinese version of TapTap, there are over 145 “ACGN” games that are unreleased. Thanks to the popularity of the previous ACGN games, several to-be-released big mobile games including “Wuthering Waves”, “Arknights: Endfield”, and “Honkai: Star Rail” have also attracted a lot of attention.

There’s a limit on the number of games approved each year in China, so some game companies **would choose to release their completely developed games on Steam or even release the corresponding international versions.**

Some of the games have achieved brilliant performance in the market.



# Metaverse: Starting with Games of the Highest Profitability



## Biggest user group in the future: Generation Z

Generation Z is a group of consumers who have been seamlessly connected to the Internet since they were born, and therefore greatly influenced by informatization and digitization. Metaverse games are expected to gain greater acceptability among them.

## A strong increase in the demand for online entertainment driven by the pandemic

The COVID-19 pandemic broke out in 2019 has greatly changed the daily lives of people around the world to result in a demand surge for pan-entertainment and social games.

With the normalization of COVID-19 pandemic prevention and control measures, metaverse games have begun to take shape and are one of the most promising metaverse markets.



# More Gamers Wish to Play Metaverse Games in the Future



## 39% of gamers wish to play metaverse games

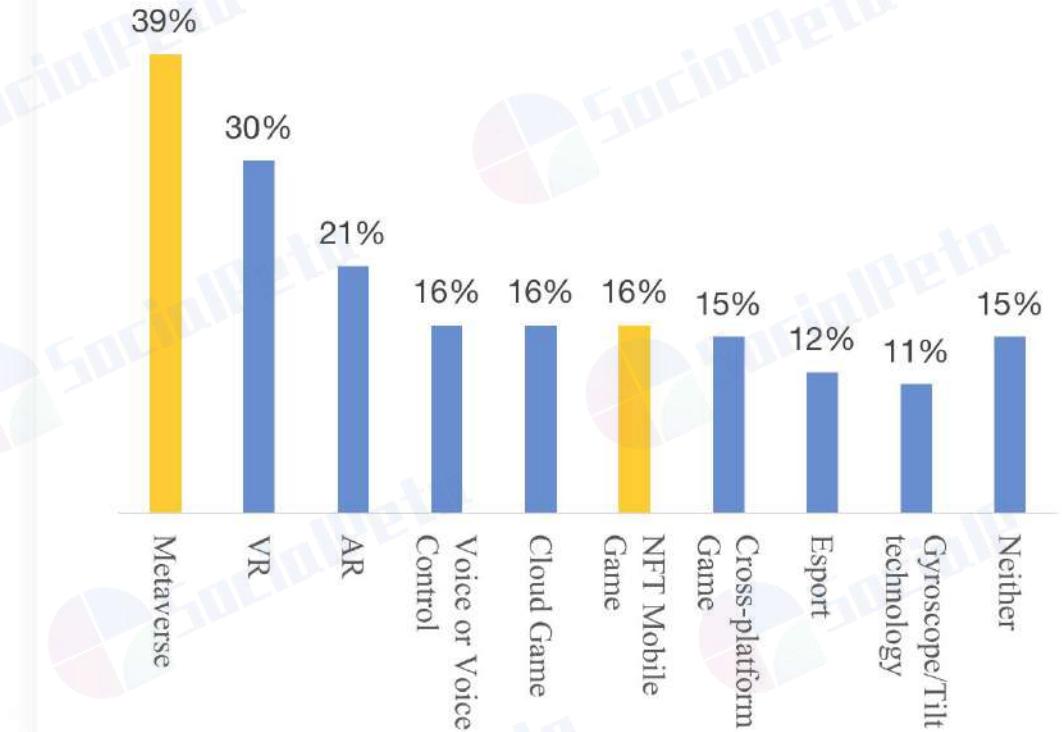
According to the “Mobile Insights Report 2022” recently released by Google, there are 32% of interviewed gamers hope to see metaverse used as a new technology in games.

## Only 16% of gamers wish to play NFT mobile games

NFT mobile games had caused a sensation in gaming industry, but are not so much expected as metaverse games. According to the report, only 16% of interviewed gamers would like to play NFT games.

The report also mentioned that a majority of gamers still pursue to [get relaxed and kill time](#) by playing games.

New technologies that are expected to be in future games





# Partner Perspectives

Media, platforms, partners, and game companies.

## From social marketing on Snapchat to the three major opportunities in the globalization of mobile games

"Interest" boosts game content spending. Recommendation from friends is a marketing approach that is more trustworthy and can reach higher-quality gamers. Snapchat mainly provides services for friends to socialize, so it has a very high stickiness of users who like to interact and share with each other. Meanwhile, friends on Snapchat have 4 times more influence on users' purchase decisions than celebrities and influencers.

Game content spending shows a growing tendency, and AR marketing has become the new trend. AR has become a daily routine for users on Snapchat. 75% of Snapchat users interact with AR filters every day, averagely over 6 billion times of interactions with AR in total each day. Compared to non-AR marketing, AR marketing brings nearly 2 times more attention, highly triggering gamers' memories about the brands which will reach a stronger reaction.

And, Snapchat AR provides experience that is 1.7 times more immersive than other platforms, which makes it more helpful in enhancing the link between brands and users. AR can help link target users with games, whether they are casual games, mid-core and hard-core games, or even console games.

## Analysis of the trends of advertisement and monetization of the global mobile game market in 2022

Because of Apple's new privacy policy, advertisers have focused more on three pillars: advertising creatives optimization, context bidding, and exploration for new customer acquisition channels.

Advertisers have paid more attention to designing and optimizing creatives in order to improve the performance of marketing campaigns. Advertisers would try all kinds of advertising forms, and achieve more comprehensive key indicators of creatives through third-party data companies and advertising creatives analytic companies. Because it has been getting more difficult to obtain hierarchical data of advertisement objects, most advertising platforms are using SKAN conversion values and context bidding as a solution to maintaining advertising effects.

Chartboost DSP's machine learning also has accumulated hundreds of context signals, which can be used in algorithm models to locate target users at suitable prices and help advertisers to achieve the highest returns on investment.

To deal with the advertising challenge brought by Apple, advertisers are exploring for new customer acquisition channels, such as Amazon, attempting to attract more new users of high quality. Advertisers can pay for a relatively low CPI to acquire European and American users that have a high retention rate and a high spending rate, and future expand their customer size.

Through Chartboost DSP and context bidding, casual and hyper-casual games have achieved remarkable effects on Amazon Blue Ocean platform. To ensure a stable growth of marketing income, game developers also have made many efforts and adjustments in marketing as more importance is being attached to privacy.

We will pay constant attention to the trends of advertisement and monetization of the global mobile game market in 2022. People working in the mobile game industry will work hard to get established in the new environment and under the new rules, seeking to do better and be better.

# Partner Perspectives



Privacy changes had a big impact on the mobile game industry. In order to find success in this new era, mobile game companies need to adopt a **people-first approach**. Getting to know your players and building direct connections is essential for a holistic business strategy.

Currently, there are more than **3 billion gamers worldwide**. According to Newzoo, that number will grow to 3.7 billion by 2023.

Since such a large portion of the global population plays games, it's evident that gamers are a very diverse audience. For that reason, game publishers and marketers need to gain a deep knowledge of gamer demographics, interests, and behaviors.

A big mistake mobile game marketers make is sticking with the same target audience consisting of a very small and limited group of players. This approach makes it **harder and harder to acquire users**, especially when you consider how saturated the market is.

It's like fishing for players in a very small pond.

The solution is to expand that pool. In other words, the key to growth is **audience expansion**. Marketers need to find a way to acquire new players in an oversaturated market as well as in the post-IDFA world.

A great way to achieve that is to leverage player motivations when advertising a mobile game. This creative approach allows publishers to reach a much larger and more diverse audience of players.

It's about knowing **why people play mobile games** and matching their motivations with game advertising to form a more user-centric and personalized ad strategy. For example, some enjoy the social and competitive aspects of mobile games, while others just want to relax and unwind. The key is in designing ad creatives based on these specific motivations.

This results in more growth, not just in terms of downloads, but in monetization opportunities as well.

Traditionally, the best monetization method(3) was to sell the game or related merchandise. In the early era of game monetization, the freemium model came to dominate the likes of Candy Crush Saga and Clash of Clans. This was particularly exciting for the developers of hyper-casual games who could offer more to the gamers through in-app purchases and micro-transactions to break gamer fatigue. Gradually, advertising models also made in-game monetization opportunities wider. With creative ad formats such as Playable and Rewarded Video, advertisers could do more with advertising their games and fight banner blindness.

As brands and advertisers rethink their mobile game advertising and marketing strategies post the pandemic to reach the users, mobile gaming is opening new avenues for Indian advertisers to reach their users in ways they haven't explored before. As the Indian hardcore gamers change, we can expect a greater amount of users who would like to taste the premium offerings of their preferred games. Regular or casual gamers don't mind seeing ads in return for gaming advantages.

With gaming moves beyond the Metro and Tier-1 cities, so should your marketing. Consider vernacularization of marketing efforts to penetrate the Tier II & III markets. Adding vernacular content helps to not only have a wider reach, but also opens new ways of monetization. Companies like WinZo Games(4) have taken to vernacular Esports to reach the Tier-2 and Tier-3 cities and boasts 5 million installs in just one year. One of the interesting approaches they applied was recognizing the gap in in-app purchases in a diverse market like India and came up with a micro-transaction-led social gaming platform(5). Advertising on OEM inventory can help in penetration in Tier 2-Tier 3 markets as the vernacular audiences or the Bharat users are most likely to be found by taking advantage of OEM integrations.

This is an exciting opportunity for advertisers in gaming to buy and scale with an ad partner using a wide range of creative formats under one platform(6). Utilize programmatic channels and OEM recommendations on a full-stack unified platform to run campaigns and make an impact in front of a highly discoverable engaged audience.

Sources: (1) - The Print, (2) & (6) - MAAS website content, (3) - The National Law Review, (4) - Zeebiz, (5) - YourStory

# Partner Perspectives

## game factory

In 2021, 236 million dollars were invested in the Turkish game industry. 54 Turkish game startups received investments, and the game industry became the leading industry with the highest number of investments in the Turkish startup ecosystem. In the first half of 2022, investments in the Turkish gaming industry exceeded 500 million dollars. This year, investments in blockchain games stand out among the investments made so far.

6 startups from Turkey became unicorns until this day. 2 of these 6 startups are game companies. In the year's second half, I expect more investments to happen and one more unicorn to appear. One of the crucial needs of the Turkish gaming industry is a qualified workforce. Upcoming generations in Turkey are interested in the game industry. Each year more and more game development and design faculties open, and new communities and academies launch. But we are still far from meeting the demand. More workforce is needed in such a rapid-growing industry.

## MOBIDICTION

The mobile game scene is becoming more fierce. Ad revenues are dropping. IDFA changes by Apple are making the marketer's job harder; the competition gets heavier. The hyper-casual scene is not easy as in 2018. At this moment, I believe publishers will look for alternative channels for marketing. Big publishers will heavily invest & acquiring smaller studios to get their player base. We will see more consolidation in the future.

As it comes to the Turkish market, the country will continue to grow, creating an environment for young talent with creative ideas and ambitions. This should attract more investments to the country and help make successful studios.

# SocialPeta -- the world's leading advertising and marketing platform



Provide real-time updates of global market trends, and insights into competitors' advertising data, promotion/monetization strategies, and cost-efficient ways to acquire global customers.

## Broad

Platform, coverage of countries/regions, analysis dimensions

## Large

Data size

## Rapid

Data updating

## In-depth

Intelligent recommendation, self-developed algorithm



Over 1.2 billion advertising data



Covering 5.1 million advertisers



Multidimensional in-depth analysis of products



Exclusive data and traffic intelligence



Covering 72 countries/regions and over 90 channels worldwide



Updated hourly  
Over 1 million ad data are updated each day

90% of top companies have chosen to use “SocialPeta”



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White Paper



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Corporate Culture



# H1 2022 GLOBAL MOBILE GAME

THANKS FOR WATCHING

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