

# Q1 2023

# Insights into Global Mobile Game Marketing Trends



MOBILE GAME

MARKETING

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**5.10 million**

APP advertisers

**1.3 billion**

ad creatives

**1.20 million**

daily updates



# CONTENTS

## 01

### Global Mobile Game Marketing Trends

Global Mobile Game Marketing	5
Proportion of Mobile Game Creatives by Genre	6
Mobile Game Marketing in Different Regions	7
Advertising Analysis on iOS & Android	8
Proportion of Game Ad Creatives by Type	9

## 02

### Global Mobile Game Marketing of Top Genres

Casual Game Marketing	11
Strategy Game Marketing	17
RPG Marketing	22
Simulation Game Marketing	27
Casino Game Marketing	32

## 03

### Mobile Game Marketing in Hot Countries/Regions

The USA Mobile Game Market	39
China's HK, Macao & TW Market	45
Southeast Asian Mobile Game Market	48
Middle Eastern Mobile Game Market	53



**01**

# Insights into Global Mobile Game Marketing Trends



# Insights into Global Mobile Game Marketing

Advertisers with new creatives in Q1 2023 accounted for 90% or more, with 1 new creative among every 3 creatives.

- Q1 2023 saw **nearly 50K** advertisers with new creatives, **accounting for over 92%**
- Q1 2023 saw over 7.80 million new creatives, and **new creatives had been accounting for over 65%** ever since Q4 2022.



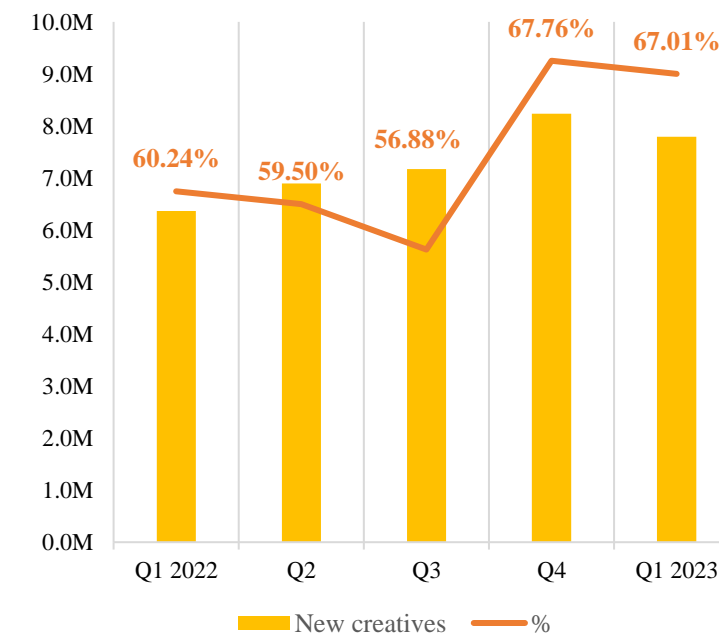
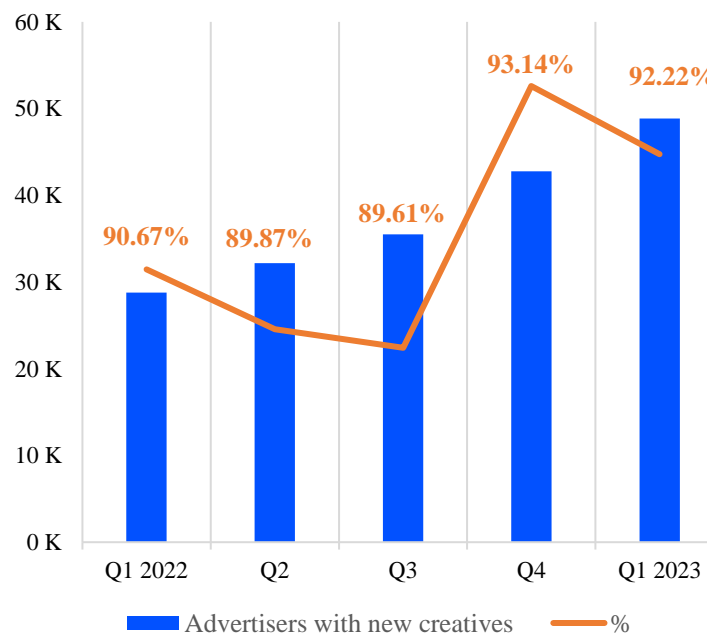
**New creatives advertisers in Q1 2023**

**48.9K, 92.22%**



**New creatives in Q1 2023**

**7.8M, 67.01%**





# Proportion of Mobile Game Creatives by Genre

Genre	% of Advertisers	YoY Change
Casual	29.16%	+2.29%
Puzzle	12.07%	+0.26%
Simulation	9.55%	-0.02%
Action	7.96%	+0.04%
RPG	6.04%	-1.32%
Casino	5.22%	+0.98%
Arcade	4.66%	-1.07%
Strategy	4.5%	-0.12%
Card	4.24%	-0.22%
Adventure	4.17%	-0.19%

Genre	% of Creatives	YoY Change
Casual	32.68%	+12.33%
Puzzle	12.12%	-1.91%
RPG	9.01%	-2.02%
Simulation	8.57%	-0.28%
Strategy	6.37%	-2.28%
Action	5.99%	-1.64%
Casino	5.3%	-0.21%
Card	4.3%	-0.7%
Arcade	3.21%	+1.25%
Adventure	3.13%	-1.7%

Source: SocialPeta, based on data that were captured and analyzed.  
Date Range: Jan. 2022 - Dec. 2022



# Insights into Mobile Game Marketing in Different Regions

North America had the highest average monthly advertisers.

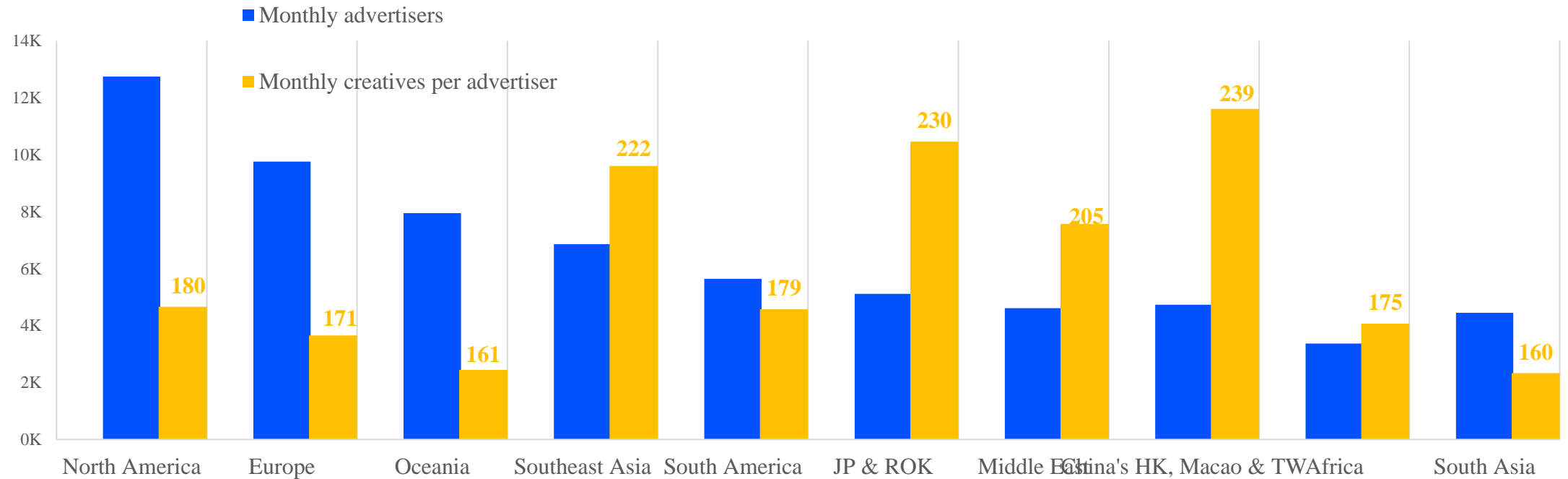
China's HK, Macao & TW regions, JP & ROK, and Southeast Asia all had over 200 monthly creatives.

### Monthly advertisers in North America: 12.7K

North America had about 13K monthly advertisers, the highest among all regions, and 30.6% higher than the No.2 region, Europe.

### Monthly creatives in HK, Macao & TW: 239

HK, Macao & TW reported averagely 240 monthly creatives per advertiser, immediately followed by JP & ROK and Southeast Asia.





# Mobile Games Advertising on iOS & Android

Creatives on Android started to rise, accounting for nearly 70%.

## Mobile game advertisers on iOS & Android in Q1 2023

Average creatives for advertisers on Android were 32.3% more than those on iOS, and creatives on Android always grew rapidly in Q1 for the last 3 years.



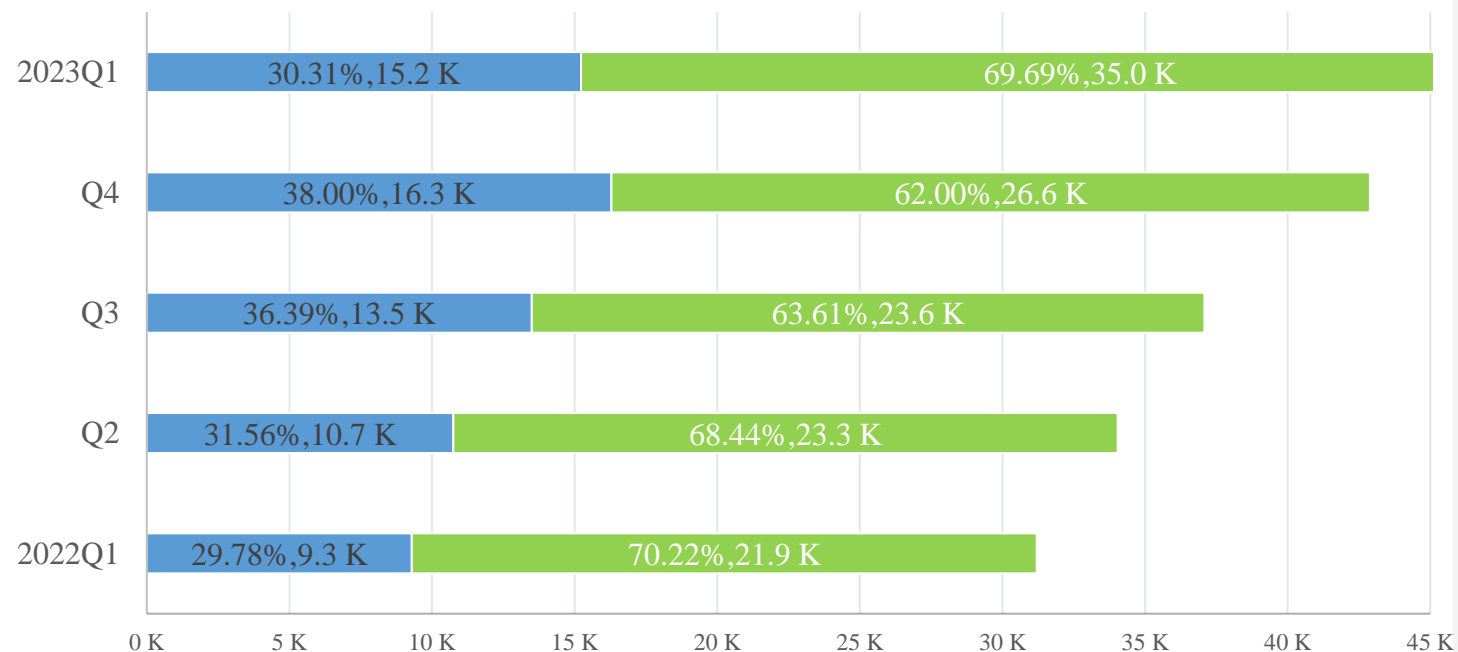
185

Creatives on iOS in Q1 2023



245

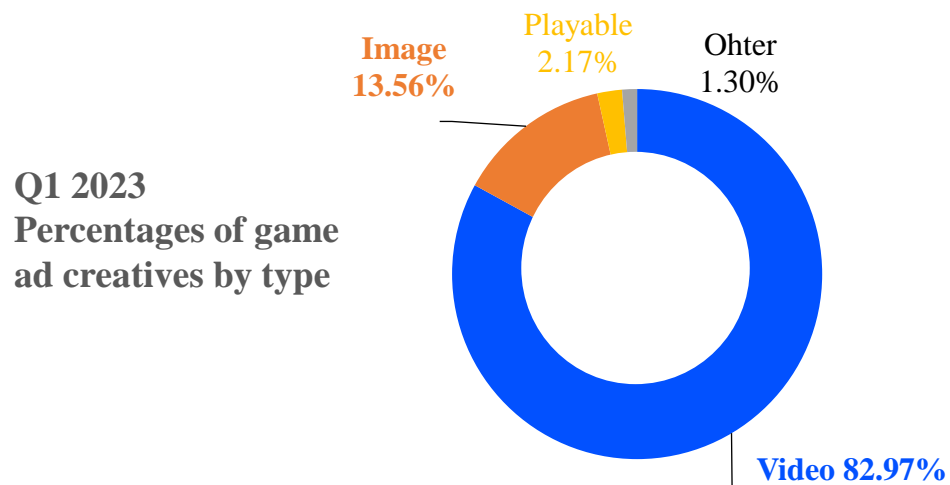
Creatives on Android in Q1 2023





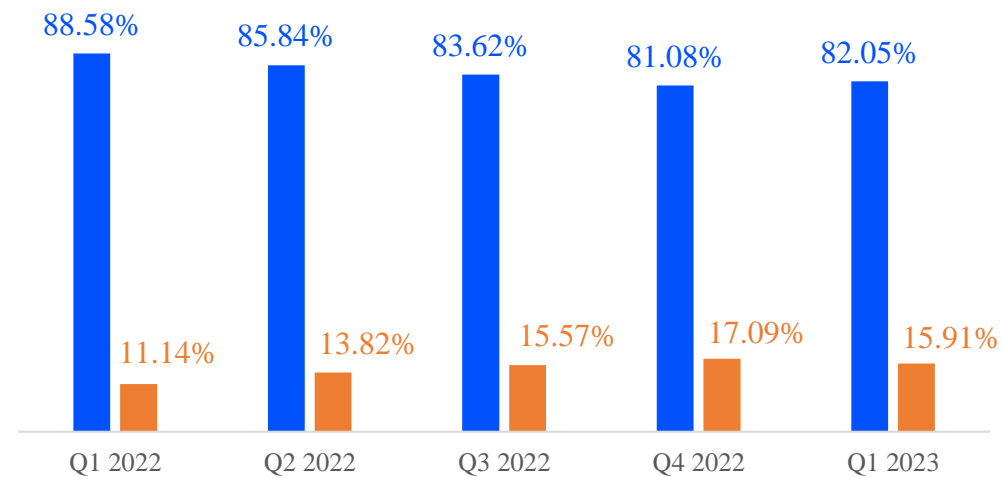


# Proportion of Game Ad Creatives by Type



## Percentages of impressions of video and image creatives

- Video creatives had the most impressions in Q1 2022
- Impressions of image creatives started a downward trend



# 97K

Estimated impressions per creative

Impressions per creative

on iOS: 114.4K

Impressions per creative

on Android: 89.1K

Genre with the highest impressions per creative: Board



**02**

# Insights into Global Mobile Game Marketing of Top Genres

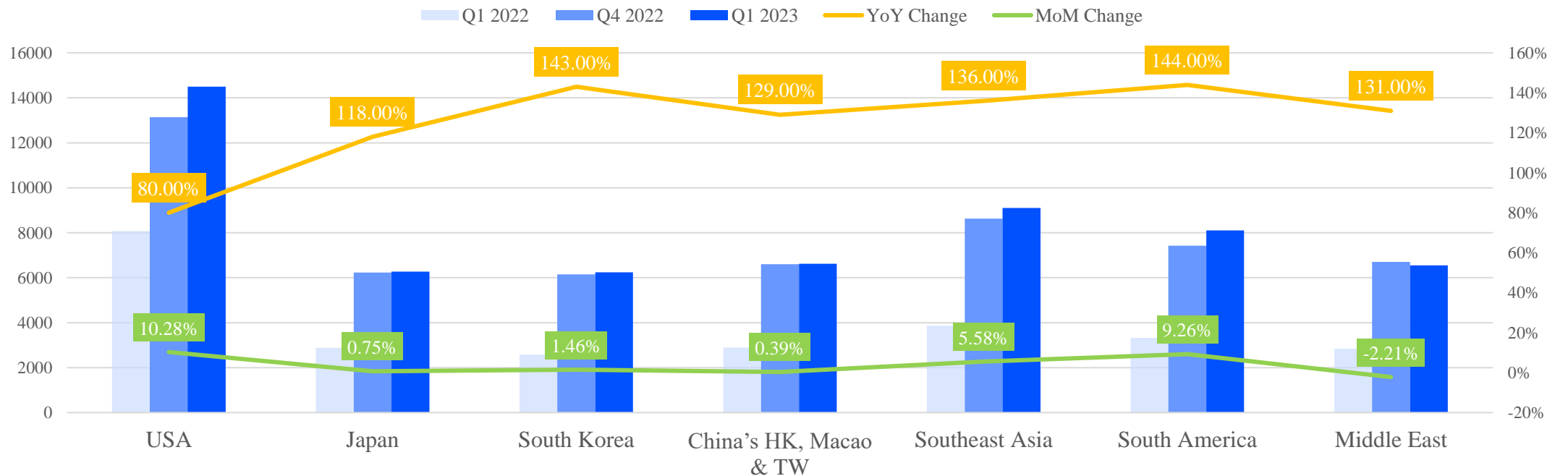


# Insights into Casual Game Marketing

Casual game advertisers increased globally, except in Middle East, and reported the most significant increase.

- USA and South America had the highest MoM growth in advertisers in Q1, which were 10.28% and 9.26%, respectively. All regions recorded over 80% YoY growth in advertisers.

Changes in the number of casual game advertisers in top countries/regions



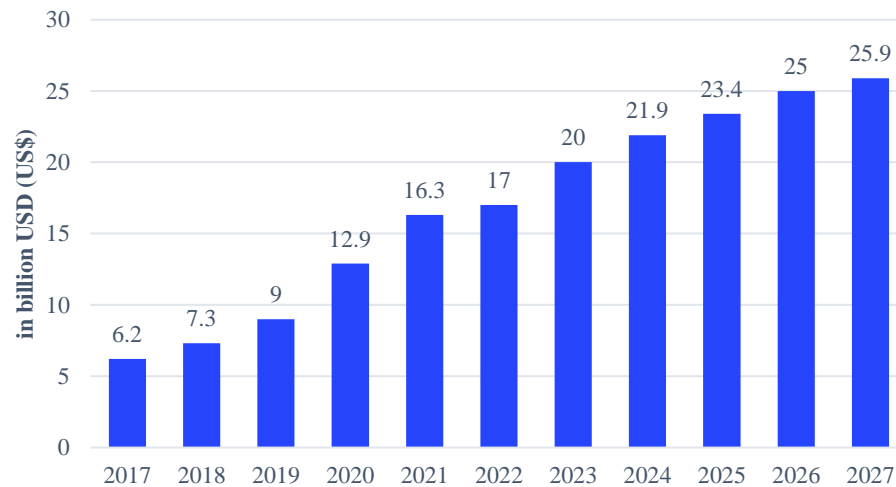


# Insights into Casual Game Marketing

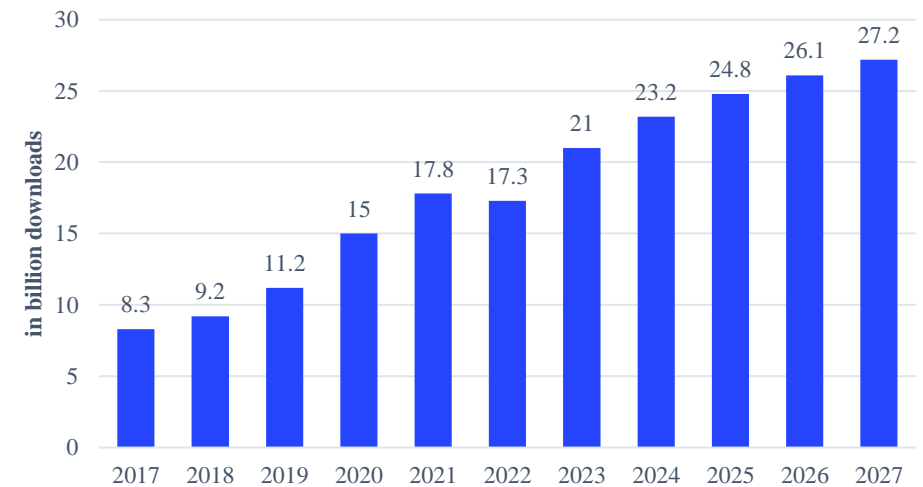
## Casual mobile games: First decline in downloads

- Global casual games achieved rapidly increasing downloads during the period of 2018-2021 and reported the first decline in downloads in 2022 as the pandemic influence started to fade. But downloads of casual mobile games are expected to rise again and remain on an upward trend in 2023.
- Downloads of casual mobile games had been increasing in India, Latin America, and Southeast Asia over the years.

Revenue trend of casual mobile games market



Downloads trend of casual mobile games market





# Classic gameplays are always popular

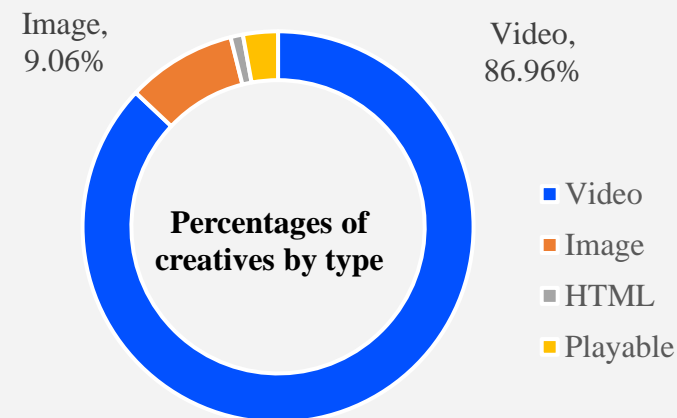


iOS			Android		
1	<b>1945</b> ONESOFT	Arcade	1	<b>Braindom</b> Matchingham Games	Brain Teaser
2	<b>Block Blast</b> Hungry Studio	Puzzle	2	<b>Hero Clash</b> Bingchuan Network	Card
3	<b>Block Puzzle</b> Doodle Mobile	Puzzle	3	<b>Bubble Shooter Star</b> Newborn Town	Matching
4	<b>Find Out</b> EYEWIND	Brain Teaser	4	<b>Bump Pop</b> Rollic	Hyper-casual
5	<b>Galaxiga</b> ONESOFT	Arcade	5	<b>Crowd Evolution!</b> Rollic	Hyper-casual
6	<b>Water Sort Puzzle</b> IEC	Hyper-casual	6	<b>1945</b> ONESOFT	Arcade
7	<b>Mob Control</b> Voodoo	Hyper-casual	7	<b>Fill The Fridge</b> Rollic	Hyper-casual
8	<b>Royal Match</b> Dream Games	Match-3	8	<b>Braindom 2</b> Matchingham Games	Brain Teaser
9	<b>Resortopia</b> DHGames	Business Simulation	9	<b>Solitaire 3D Fish</b> Polar Bear Studio	Poker
10	<b>英雄戰紀-紅藍大作戰</b> Bingchuan Network	Card	10	<b>Onnect</b> Zynga	Matching

## Brain teaser and arcade games topped the chart

## Old gameplays with some changes entered the chart

Rollic had several casual games on the chart, with gameplays including “cloning balls”, “crowd evolution”, and “fill the fridge”. Its competitors Voodoo and Zynga each had a game on the chart, with gameplays being “hit gates” and “connection-based”, respectively. They were all classic gameplays with some changes.





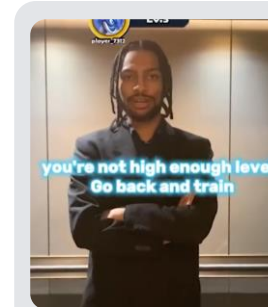
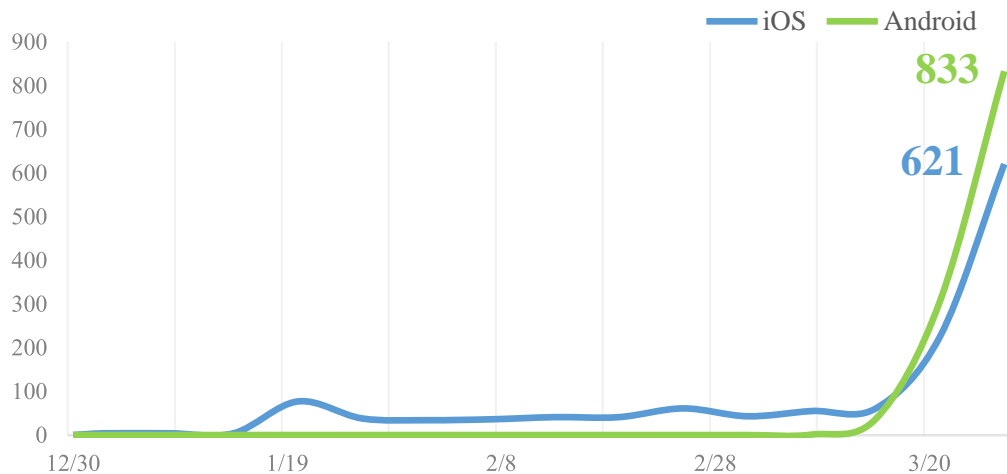
# Habby's "Industrialized" New Games



## SSSnaker Habby

Habby is in a leading place with its industrialized game development in game industry. Like its predecessor [Survivor.io], [SSSnaker] doesn't have much difference from other games previously released by Habby in game UI, methods of monetization, growth tree, and other designs.

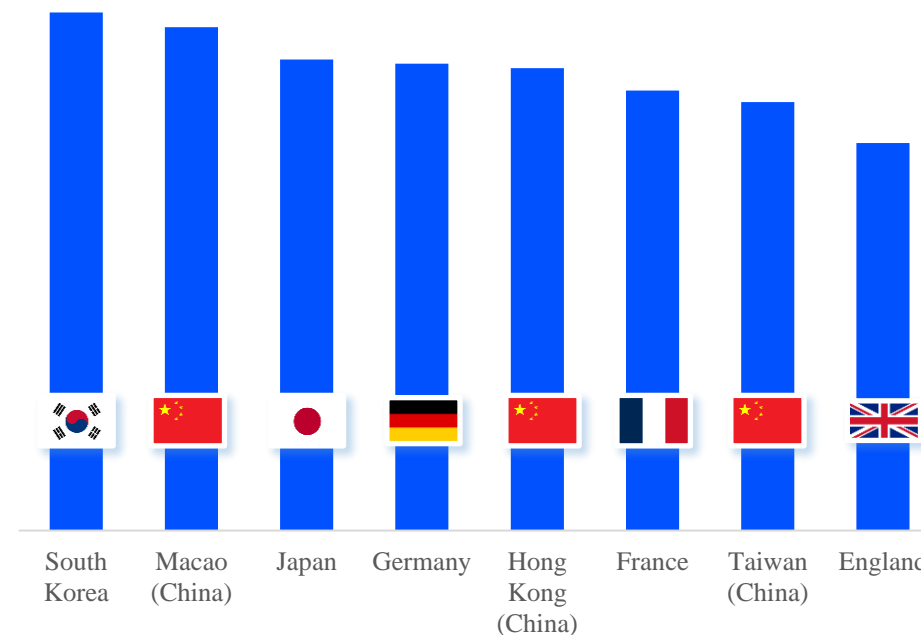
Meanwhile, [SSSnaker] includes the same "siege" mode as the io game [Snake Off]. Since its release for Google Play on 13 March, [SSSnaker] had achieved over 5 million downloads on the platform as of 27 March.



## A real person appeared in the way

Live action stories + levels required, which "forces" gamers to download the game and level up in order to know more about the story.

## Top Counties/Regions by Advertising





# Roguelike + classic casual games = The next hit game

## Roguelike hard-core gameplay

It can be traced back to 1970s with the following features:

1. Random maps & buff
2. No retractions
3. Only one life
4. Nonlinear progress
5. Simple UI
6. Complex system



## Classic casual games

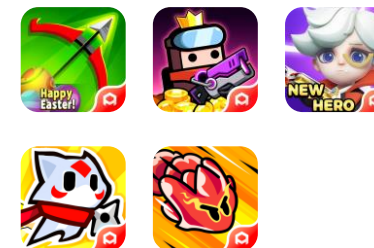
Inspiring old games, simple and easy to play but addictive:

1. Puzzle bobble
2. Parkour
3. Breakout clone
4. Hack and Slash
5. Snake
6. ...



## The next hit game

Habby's universal formula is credited with developing several hit games:





# Some Popular Creatives of Casual Games in Q1

Classic film and television images, reenactment of life scenes and aggressive methods are used frequently, and the overall performance is good

## Attack Hole

HOMA GAMES



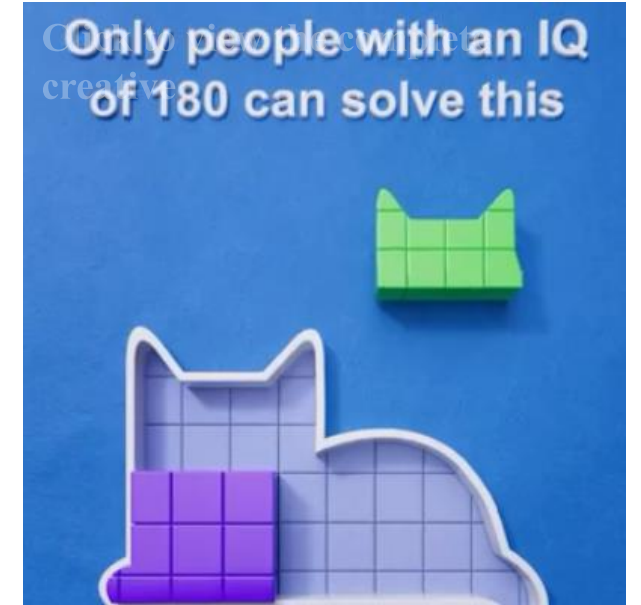
## Fill The Fridge

Rollic Games



## Block Blast Adventure Master

Hungry Studio





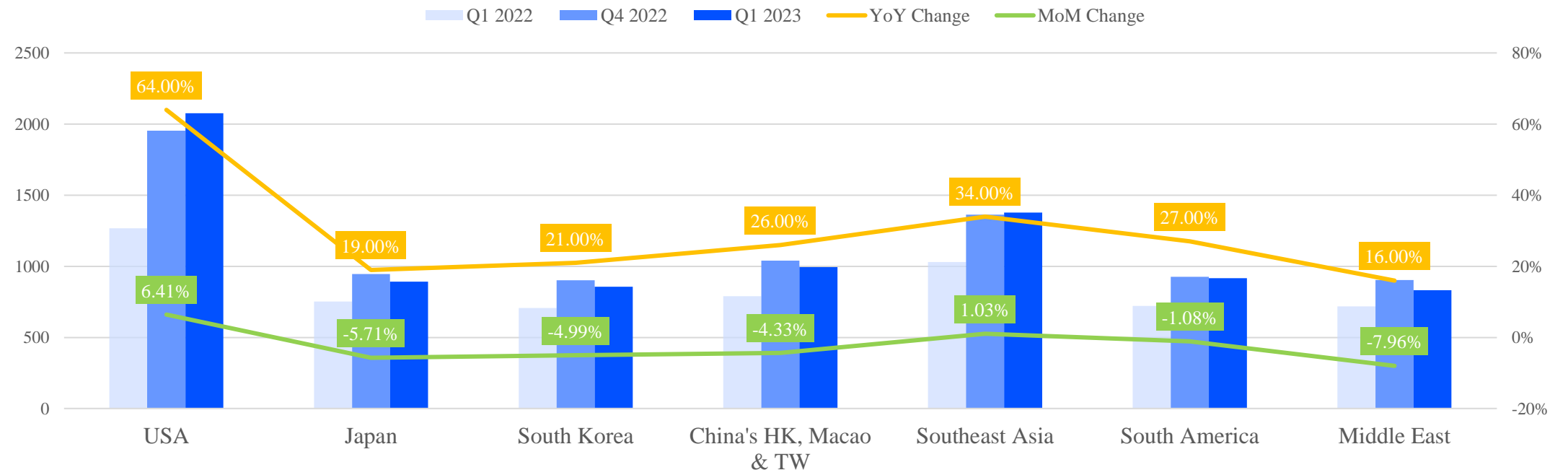


# Insights into Strategy Game Marketing

The market is fiercely competitive. Advertisers mainly invest in the United States, followed by Southeast Asia. The overall increase in the number of advertisers is lower than other types

- In terms of strategy game advertisers in Q1, YoY growth was recorded basically in all countries/regions while MoM growth was only reported in the USA and Southeast Asia. The greatest MoM growth happened in the USA, about 6.41%.

Changes in the number of strategy game advertisers in top countries/regions



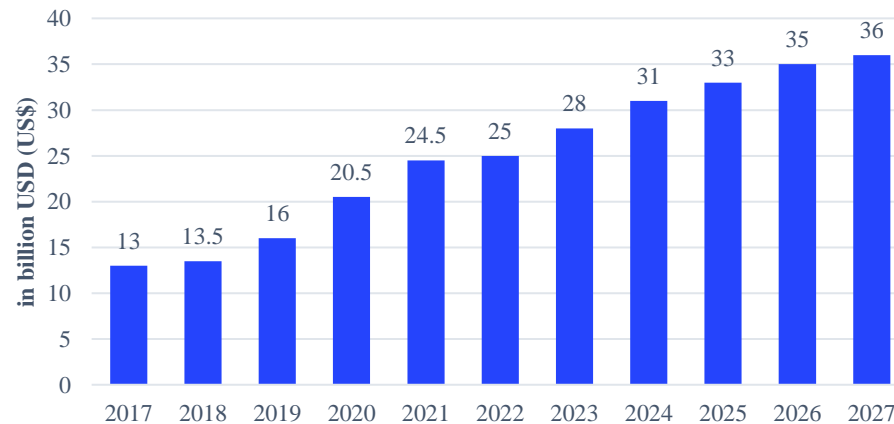


# Insights into Strategy Game Marketing

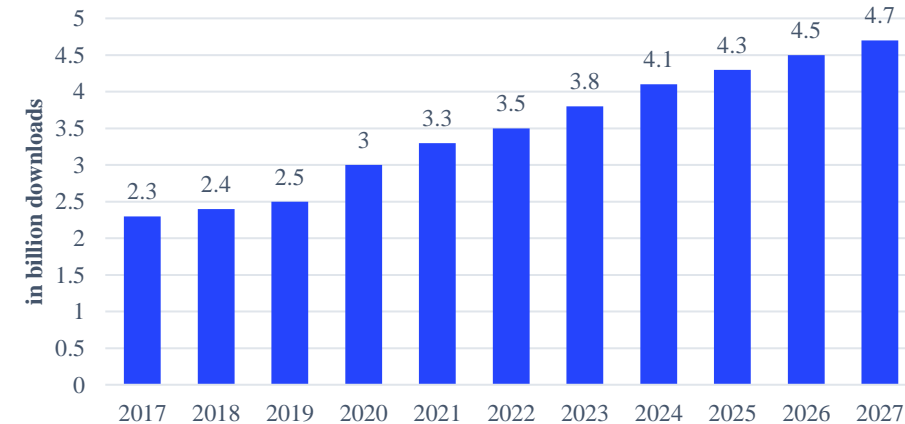
## Strategy games: A sharp decrease in revenue growth

- Strategy games' revenue growth slowed abruptly in 2022 to the same level as in 2021. Based on the data of Q1, strategy games' revenue will be rising in 2023 and strategy game's total revenue is expected to increase at an annual growth rate (compound annual growth rate 2022-2027) of 6.42%.
- Most revenue was from China. China's strategy mobile games stood out in many markets, such as [Evony-US], [三国志-战略版-JP], [万国觉醒-KR], and other games.

### Revenue trend of strategy mobile games market



### Downloads trend of strategy mobile games market





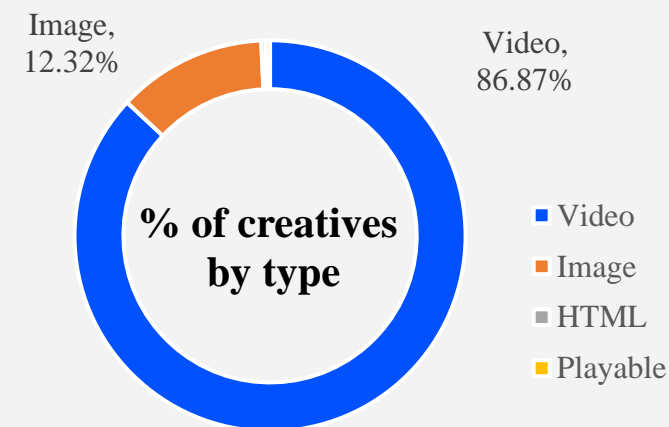
# SLG dominated the chart, with a few strategy card games



iOS			Android		
1	<b>Mighty Party</b> Panoramik Games	Strategy RPG	1	<b>The Grand Mafia</b> Yotta Games	SLG
2	<b>Lords Mobile</b> IGG	SLG	2	<b>Last Fortress</b> IM30	SLG
3	<b>The Ants</b> StarUnion	SLG	3	<b>Evony</b> TOP GAMES	SLG
4	<b>Age of Apes</b> Tap4Fun	SLG	4	<b>Lords Mobile</b> IGG	SLG
5	<b>Đế Quốc Quật Khởi</b> VNMocGame	SLG	5	<b>Mafia City</b> Yotta Games	SLG
6	<b>Nonstop Game: 3D RPG</b> Seven Pirates	Idle	6	<b>The Ants</b> StarUnion	SLG
7	<b>The Grand Mafia</b> Yotta Games	SLG	7	<b>Rise of Empires</b> IM30	SLG
8	<b>MARVEL SNAP</b> Nuverse	Digital collectible card	8	<b>謀攻: 天下為局</b> Gacraze	SLG
9	<b>Evony</b> TOP GAMES	SLG	9	<b>Tower Brawl</b> DOMO ZOO	Strategy Card
10	<b>Warpath: Ace Shooter</b> Lilith Games	SLG	10	<b>State of Survival</b> FunPlus	MMO

## Chinese SLG dominated the chart Advertising is in great competition

Q1's strategic advertising is basically dominated by overseas versions of Chinese games Besides the old SLGs. Nuverse's digital collectible card game [MARVEL SNAP] ranked No.8 on the chart. Developed based on a Marvel IP and by the same team of Hearthstone, [MARVEL SNAP] appeared on the App Store chart of top 10 free games in 69 countries/regions upon its release.

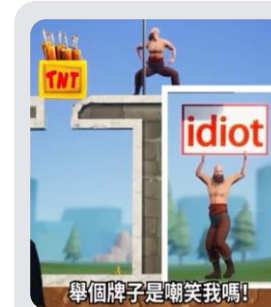


# Sea adventure game won great popularity through mini-game advertising



## Stormshot FunPlus

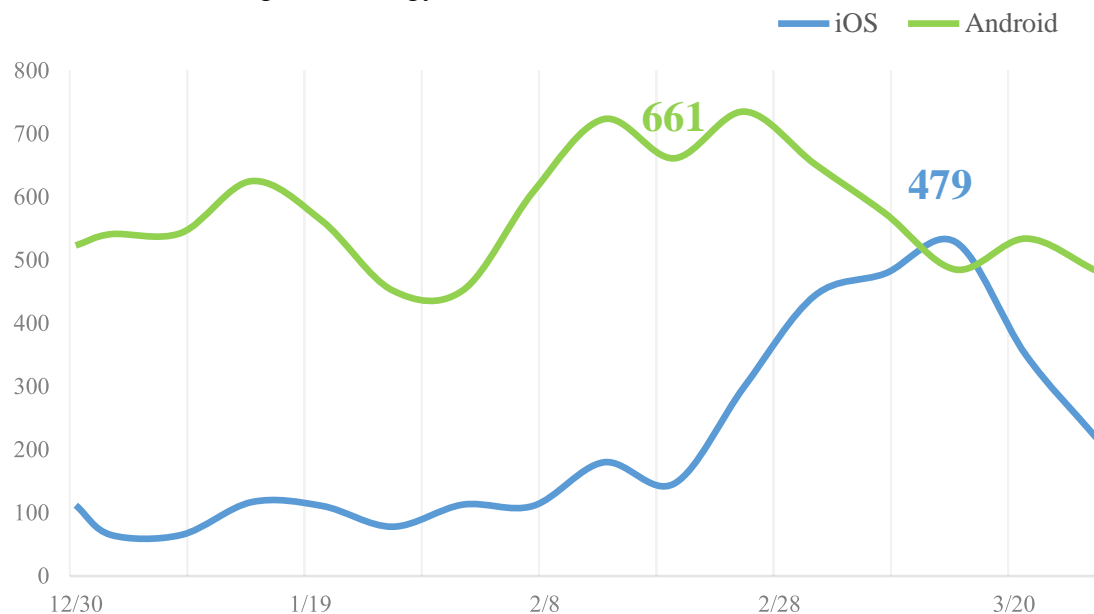
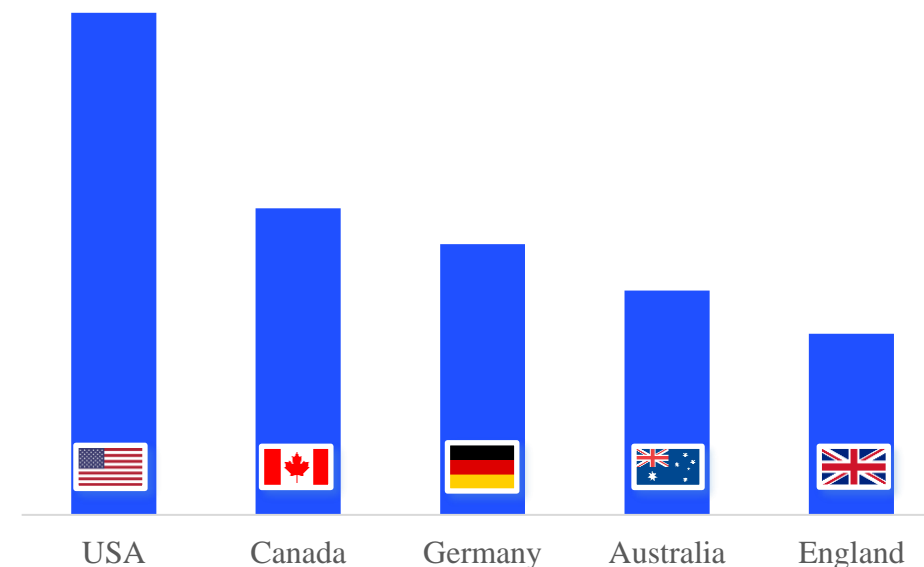
[Stormshot] is a SLG featuring pirates and treasure hunting. The game is based on the novel “Treasure Island” and combines simulation with firing bullets in its light gameplay. Before that, some games tried to use mini-game strategies but they didn’t work well. Because of the style of painting and copies of [Stormshot], it is more natural for them to adopt the mini-game strategy.



### Role Mocking

The anchor talks to himself, guides users to pay attention to the role mocking after failure, and stimulates players to transform after substituting themselves

### Top Counties/Regions by Advertising



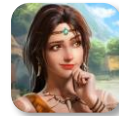


# Insights into Strategy Game Marketing

Some classic scenes from films or tv series were used in the creatives, such as chasing in Resident Evil, and biomechanical humanoid mechas named EVA.

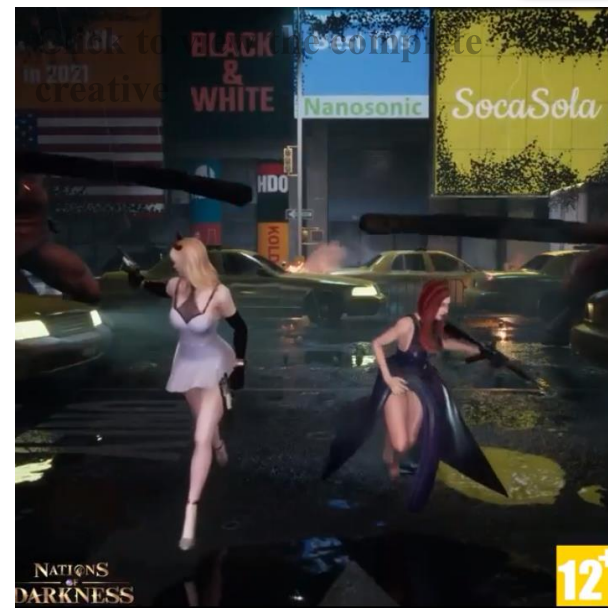
## Primitive Era

37Games



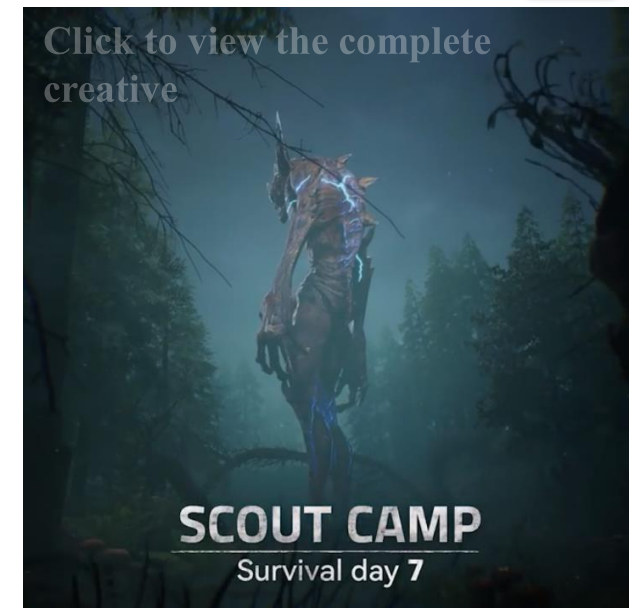
## Nations of Darkness

StarUnion



## Doomsday: Last Survivors

IGG



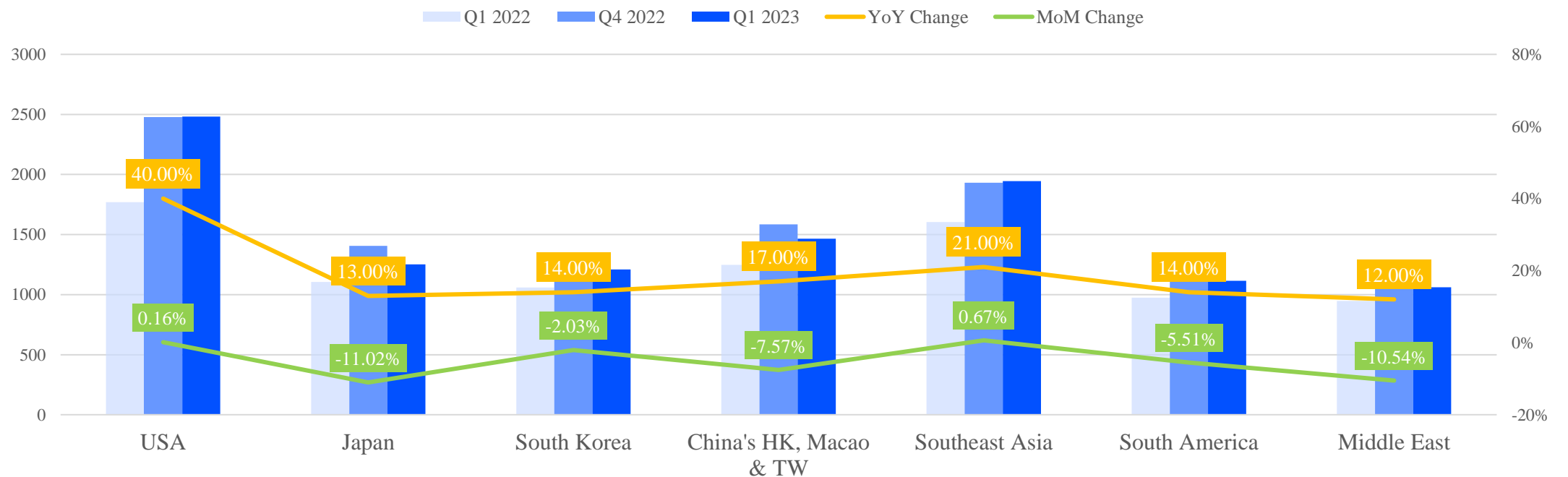


# Insights into RPG Marketing

The market cooled down and experienced a decline greater than any other markets

- Q1 saw a decline in RPG advertisers MoM in most regions, except USA and Southeast Asia which reported a MoM growth of 0.16% and 0.67%, respectively.

Changes in the number of RPG advertisers in top countries/regions



Source: SocialPeta, based on data that were captured and analyzed.  
Date Range: Jan. 2022 - Mar. 2023

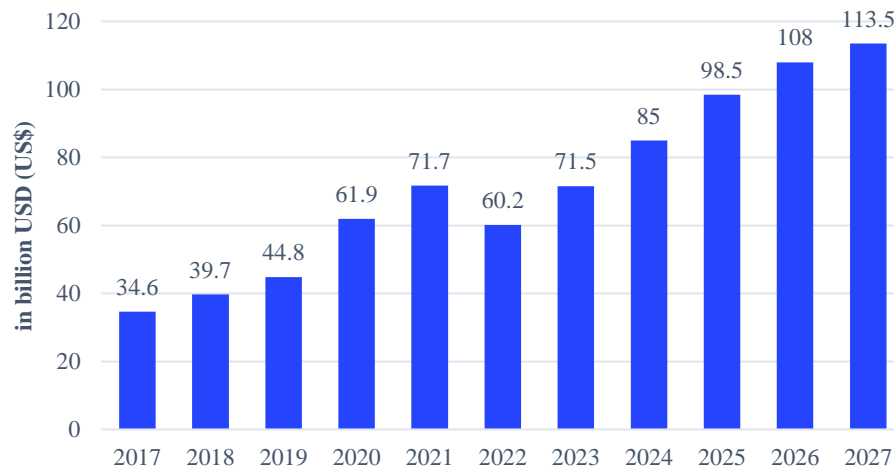


# Insights into RPG Marketing

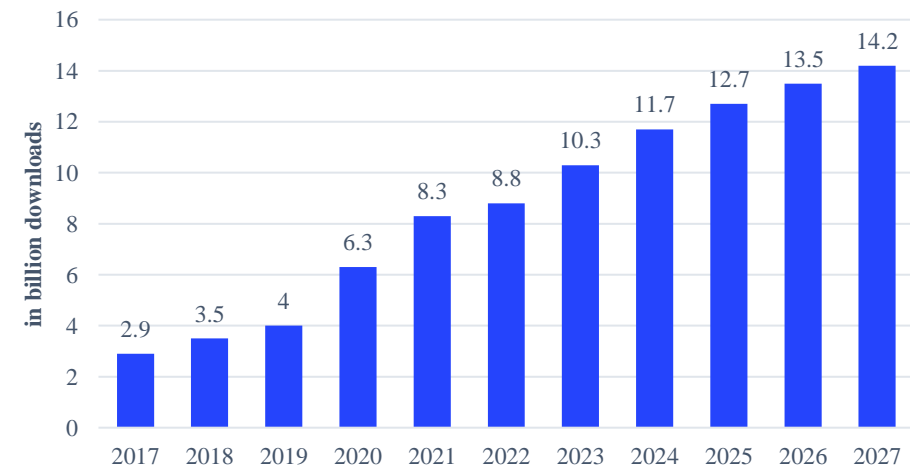
## RPGs: First decline in revenue

- In 2022, revenue of RPGs started to decline by about 16%. Downloads of RPGs in 2022 remained nearly unchanged as last year, because of the pandemic and the significant increase in R & D cost of RPGs. Based on the data of Q1 2023, revenue of RPGs is expected to rise.
- For each market, the local RPGs contributed the most revenue, for example [Puzzles & Survival-US], [赛马娘-JP], and [Lineage W-KR].

### Revenue trend of RPGs market



### Downloads trend of RPGs market





# Internationalization of MMOs is gaining momentum

## Korea's breakout is imminent

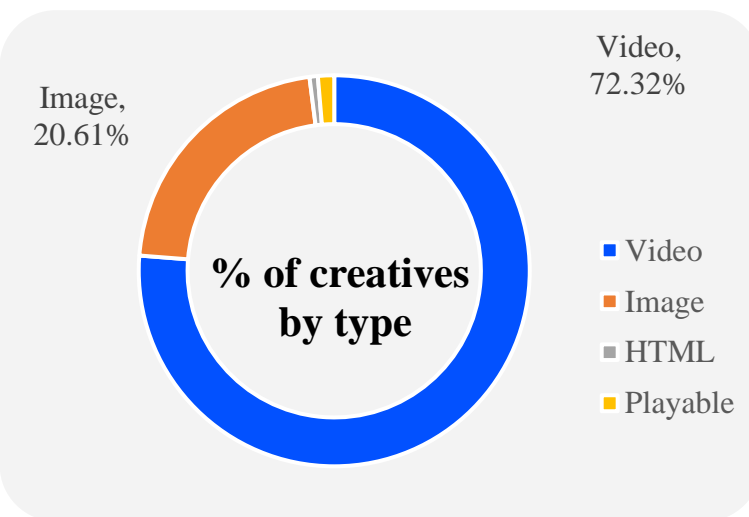


iOS			Android		
1	<b>卡利茲傳說</b> Game Beans	MMO	1	<b>Epic Heroes</b> Bingchuan Network	Idle
2	<b>Mighty Party</b> Panoramik Games	Strategy RPG	2	<b>Mighty Party</b> Panoramik Games	Strategy RPG
3	<b>暮色雙城</b> SpringGame	MMO	3	<b>暮色雙城</b> SpringGame	MMO
4	<b>Revelation: Thiên Dụ</b> VNG	MMO	4	<b>花舞宮廷</b> Origin Mood	Palace Intrigue
5	<b>Demon Hunter</b> jjgames	MMO	5	<b>靈蛇奇緣</b> Doki Studio	MMO
6	<b>Airship Knights</b> SuperPlanet	Idle	6	<b>Demon Hunter</b> jjgames	MMO
7	<b>靈蛇奇緣</b> Doki Studio	MMO	7	<b>Rage Mage</b> Modo Global	RPG
8	<b>花舞宮廷</b> Origin Mood	Palace Intrigue	8	<b>Survivor.io</b> Habby	Zombies
9	<b>Rage Mage</b> Modo Global	RPG	9	<b>Summoners War</b> Com2uS	MMO
10	<b>Summoners War</b> Com2uS	MMO	10	<b>이모탈 소울</b> SpringGame	MMO

There are many products from Hong Kong, Macao and Taiwan of China  
Fierce competition in fantasy and fairy tale themes

Game Beans' [卡利茲傳說] and Bingchuan Network's [Epic Heroes] topped the advertising chart of RPGs in Q1.

MMO games occupied most of the spots on the chart. SpringGame had several games on the chart and started to release new games in South Korea after a long time in Hong Kong, Macao, and Taiwan.





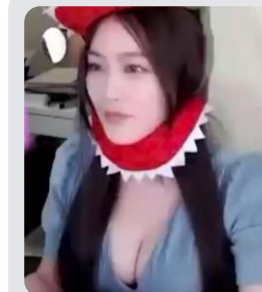
# Warm-up for New Games: massive media buying + plenty of rewards



## 卡利茲傳說 Game Beans

In November 2022, Game Beans, the game publisher in Taiwan (China), announced its plan to launch the mobile game [卡利茲傳說] in China's HK, Macao & TW regions. The game started its pre-registration on 27 December, 2022 and was launched in China's HK, Macao & TW regions on 31 January, 2023.

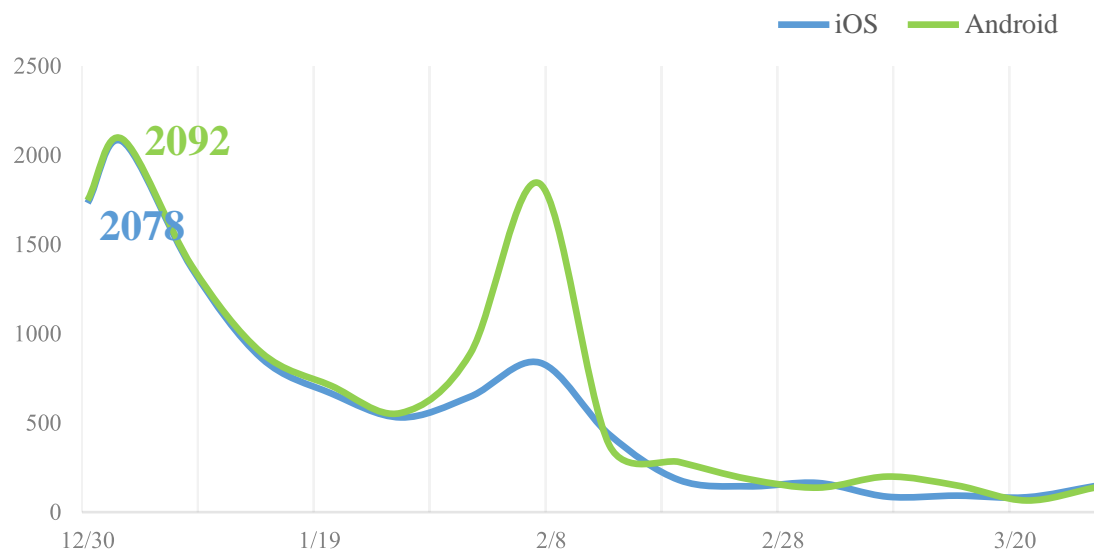
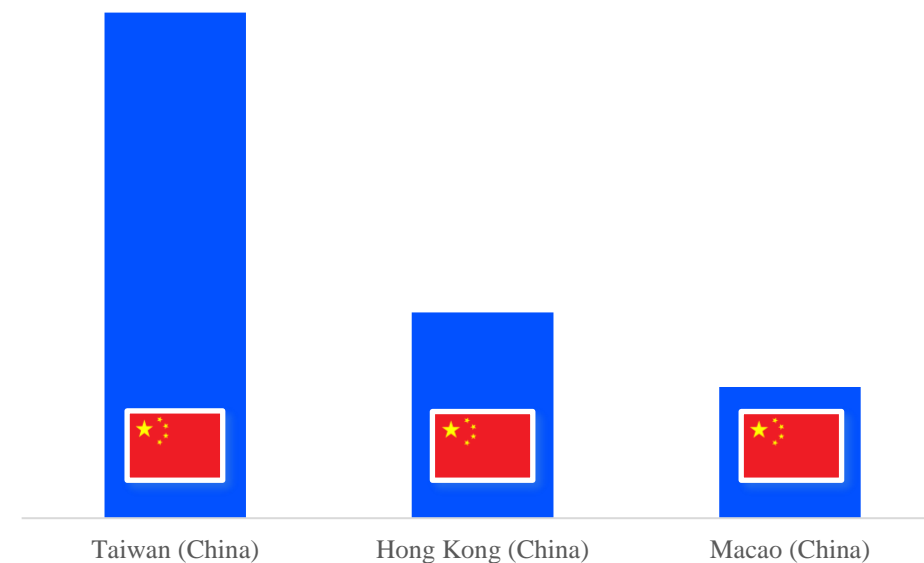
According to information online, the game was developed by Zlongame. [龙之国物语], the game's version for China's mainland, was launched in March 2022 and soon topped the iOS free games chart in China. It stayed on the iOS chart of top 10 best-selling games for a whole week, raking in over RMB 300 million on iOS alone.



### Playing the game with beautiful streamers

A well-known local female streamer live-streams herself playing the game, attracting gamers with her sexy body shape and pretty face, and live gaming scenes.

### Top Counties/Regions by Advertising





# Some Popular New RPGs in Q1

The frequency of live-action materials is high, and the main ideas are classic "sneak attack" plots, anchor recommendations and game scene reproductions

## 馬賽克英雄

More2Game



Click to view the complete creative

## 로스트 이터: 무한 파밍

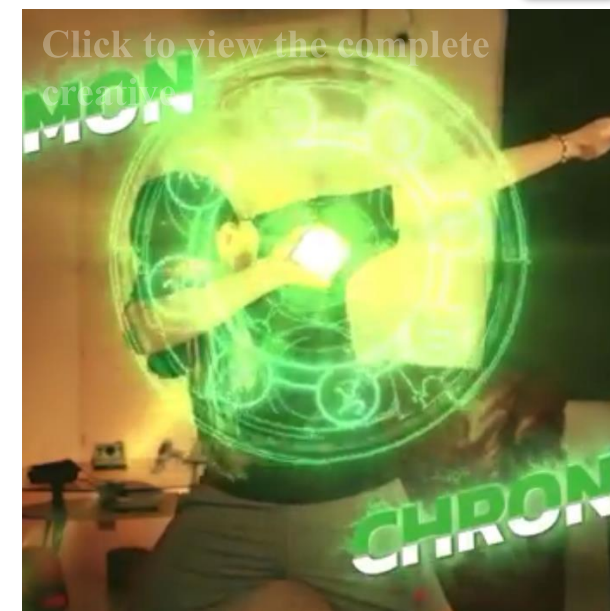
Kingnet Technology



Click to view the complete creative

## Summoners War

Com2uS



Click to view the complete creative

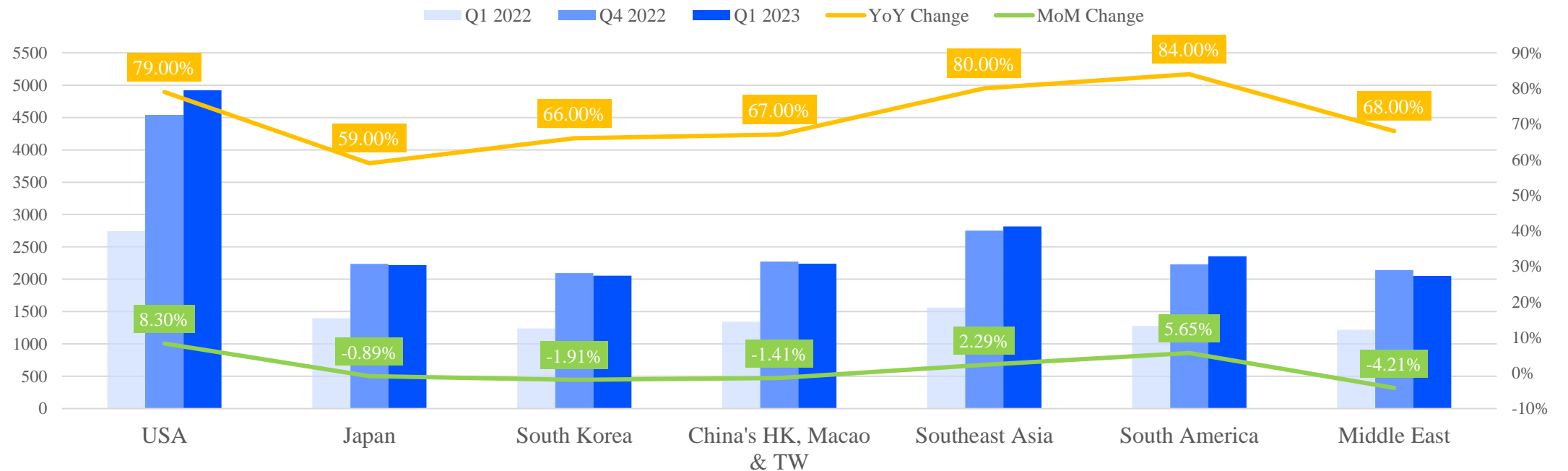


# Insights into Simulation Game Marketing

South America outcompeted Southeast Asia and became the one with the second highest growth in simulation game advertisers.

- Number of advertisers in Q1 grew by over 50% YoY in all regions. In addition to the United States, the number of advertisers in Q1 also increased from South America and Southeast Asia, which were 5.65% and 2.29% respectively.

### Changes in the number of simulation game advertisers in top countries/regions



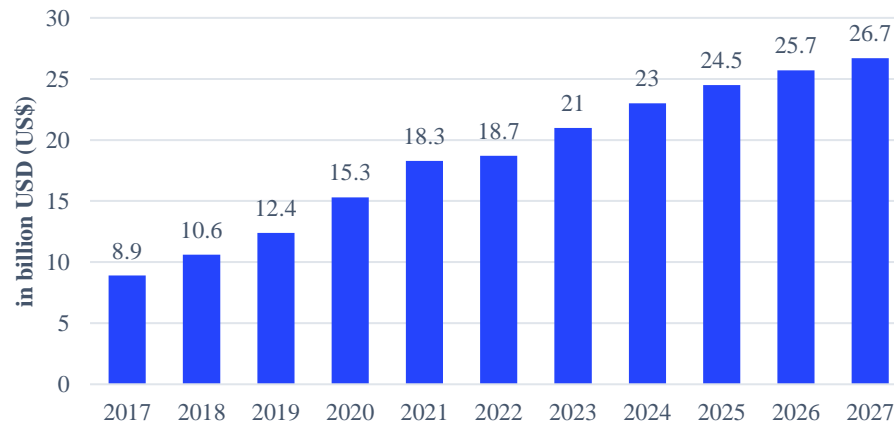


# Insights into Simulation Game Marketing

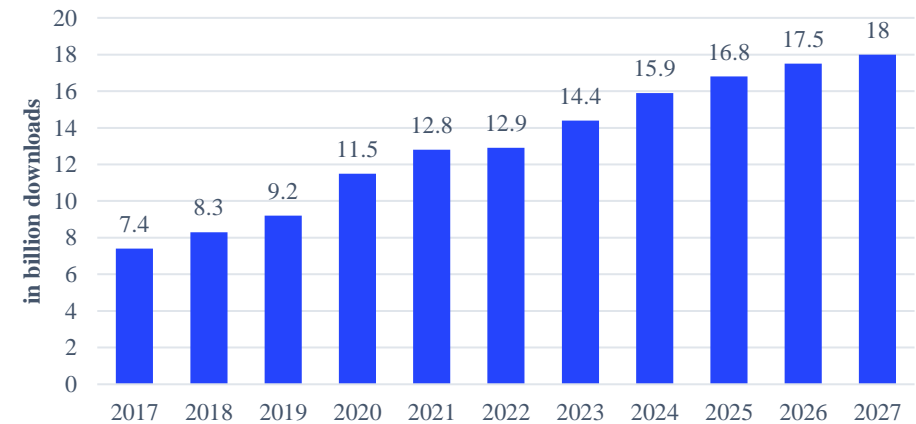
## Simulation games: Revenue and downloads are roughly flat

- Simulation games' revenue and downloads in 2022 remained almost unchanged compared to 2021. Simulation games' total revenue is expected to increase at an annual growth rate (compound annual growth rate 2022-2027) of 6.12% . The market size is expected to reach to \$2666 million in 2027.
- There were also outstanding simulation games in China, such as [商人放浪记], [摩尔庄园], and [富甲江户城].

### Revenue trend of simulation mobile games market



### Downloads trend of simulation mobile games market





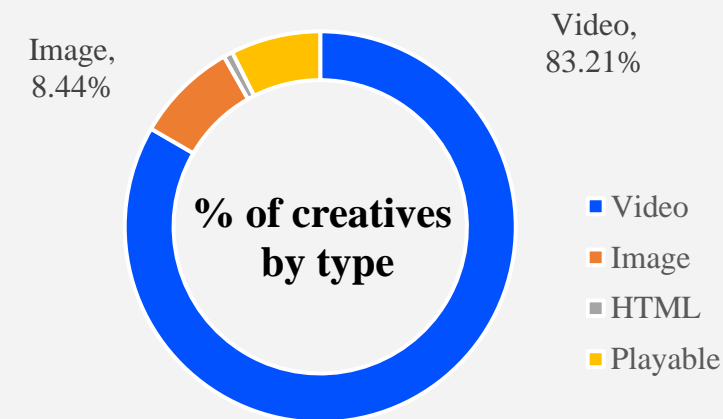
# New games inspired by relaxing short videos



iOS			Android		
1	<b>花舞宫廷</b> Origin Mood	Palace Intrigue	1	<b>Fill The Fridge</b> Rollic	Hyper-casual
2	<b>The Ants</b> StarUnion	SLG	2	<b>Dragonscapes Adventure</b> Century Games	Farm
3	<b>歡樂大東家</b> EWORLD	Business Simulation	3	<b>歡樂大東家</b> EWORLD	Business Simulation
4	<b>戀戀清庭:邂逅</b> Ludoo Games	Palace Intrigue	4	<b>Chapters</b> Crazy Maple Studio	Interactive Novel
5	<b>Last Fortress</b> IM30	SLG	5	<b>Travel Center Tycoon</b> SONOW	Idle
6	<b>Resortopia</b> DHGames	Business Simulation	6	<b>Idle Office Tycoon</b> Warrior Games	Idle
7	<b>Used Car Tycoon Games</b> HunDong Game	Idle	7	<b>ASMR Salon</b> SimBOX	Beauty Makeup
8	<b>Dragonscapes Adventure</b> Century Games	Farm	8	<b>Pressure Washing Run</b> Rollic	Hyper-casual
9	<b>Idle Office Tycoon</b> Warrior Games	Idle	9	<b>Township</b> Playrix	Farm
10	<b>買樓吧哥哥</b> Leyo Game	Idle	10	<b>Build Master: Mars Ville</b> FirstFun	Building

## Increase in casual simulation games Business simulation games had steady ad creatives

In Q1, Origin Mood's [花舞宫廷] and Rollic's [Fill The Fridge] topped the simulation games chart of advertising. According to SocialPeta's data, it's obvious that relaxing simulation games had been increasing in recent years. For example, [Pressure Washing Run], a Rollic game about washing floors, which was also on the Q1 chart of advertising.





# Winter apocalypse survival games were trendy



## Frozen City Century Games

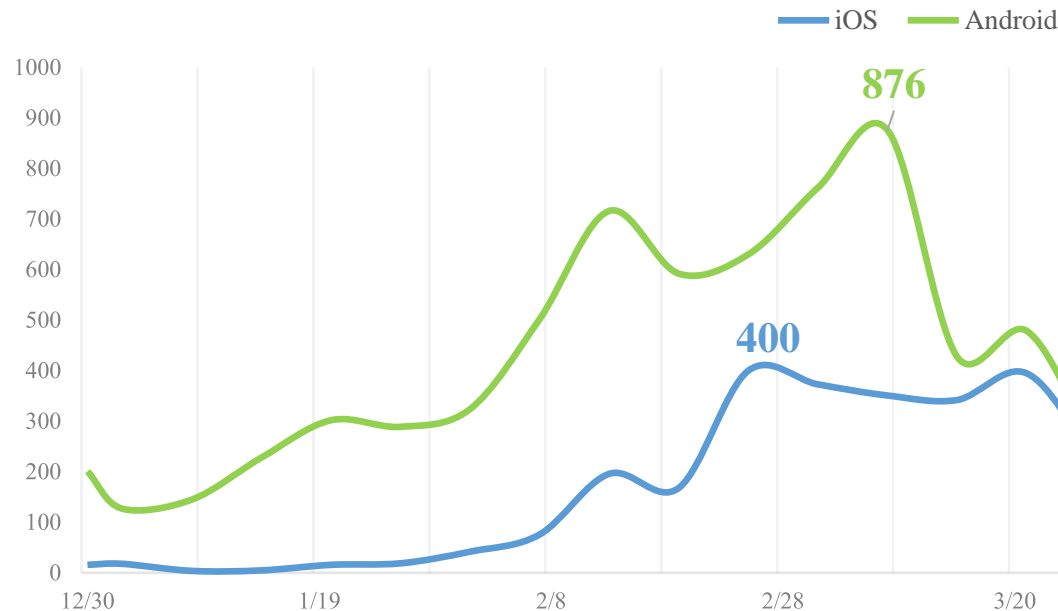
Century Games released a business simulation game [Frozen City] in December 2022. The game is set in an ice and snow apocalypse where gamers as the manager of the last sanctuary in the world should protect all the people there.

The game's creatives show that the game was inspired by the previously popular creative "fix the house". Only the misery is increased from "frozen stiff" to frozen into death".

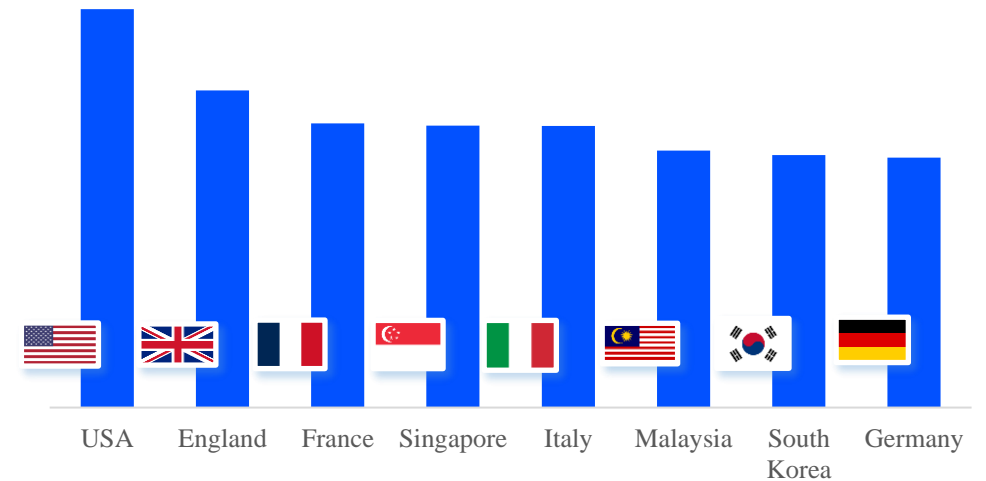


### Stupid moves leading to a failure

Deliberately fail the game by making the wrong choices, in order to lure the audience into downloading the game.



## Top Counties/Regions by Advertising



Source: SocialPeta - Ad Display, displaying the new and relatively popular creatives within the date range.  
Date Range: Jan. 2023 - Mar. 2023

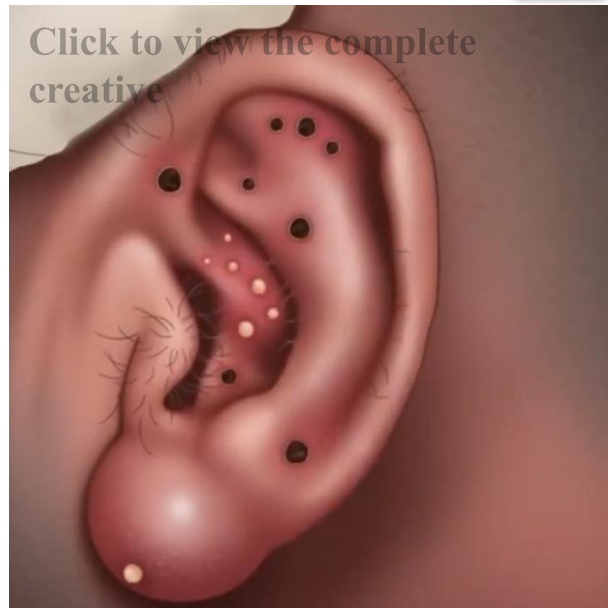
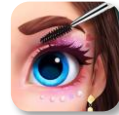


# Some Popular Creatives of Simulation Games in Q1

Relaxing creatives about popping pimples and pedicures are popular in the simulation games. Celebrity endorsers have great advertising effects in the local simulation game market.

## Dragonscapes Adventure

Century Games



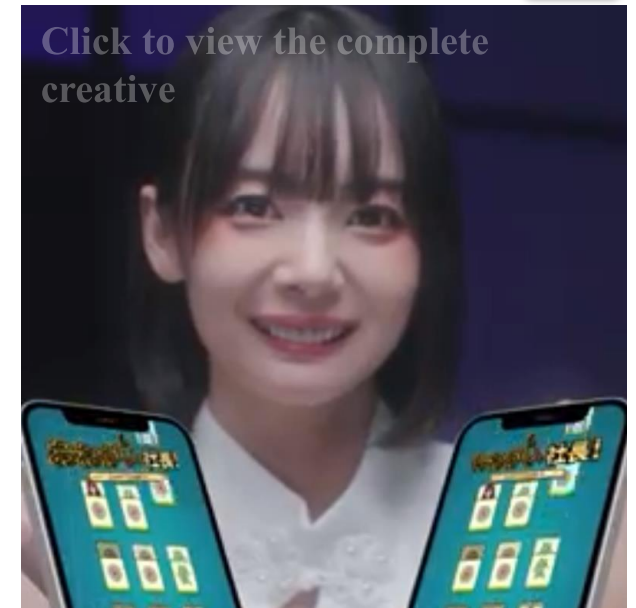
## Makeover Studio

LIHAO



## おねがい社長!

EWORLD



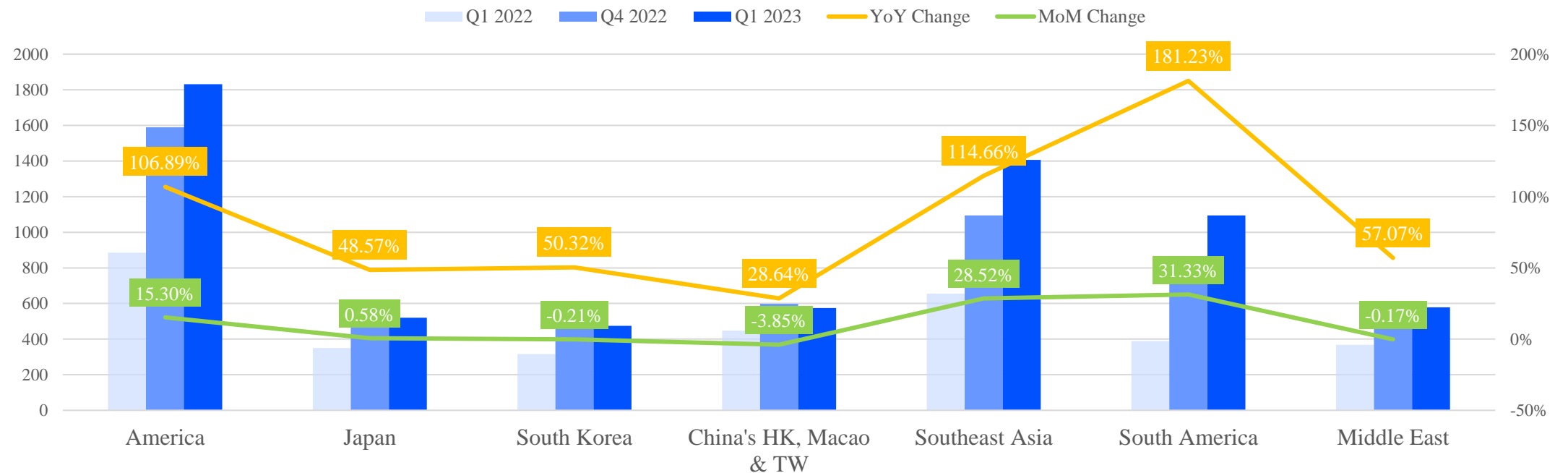


# Insights into Casino Game Marketing

America, Southeast Asia, and South America were the target markets of casino advertisers.

Casino game advertisers reported the highest YoY growth in South America. However, because of the re-opening of offline places, casino game advertisers declined MoM in South Korea, the Middle East, and China's HK, Macao & TW.

### Changes in the number of casino game advertisers in top countries/regions



Source: SocialPeta, based on data that were captured and analyzed.  
Date Range: Jan. 2022 - Mar. 2023



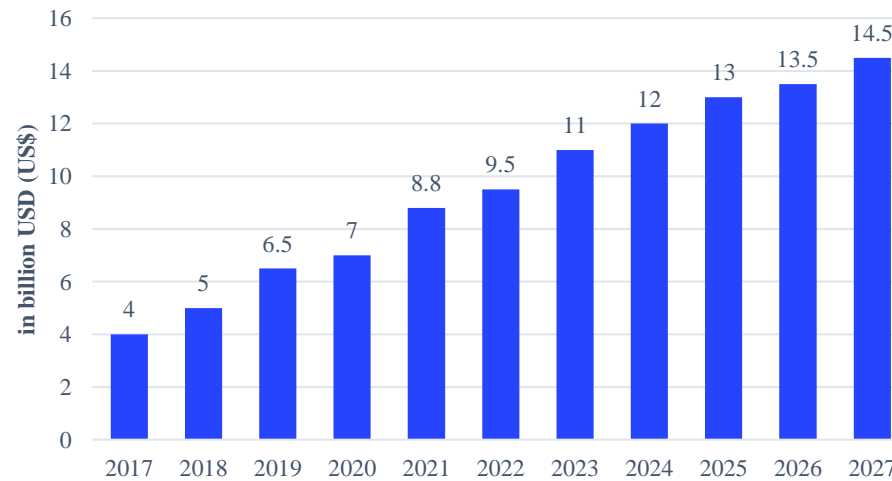


# Insights into Casino Game Marketing

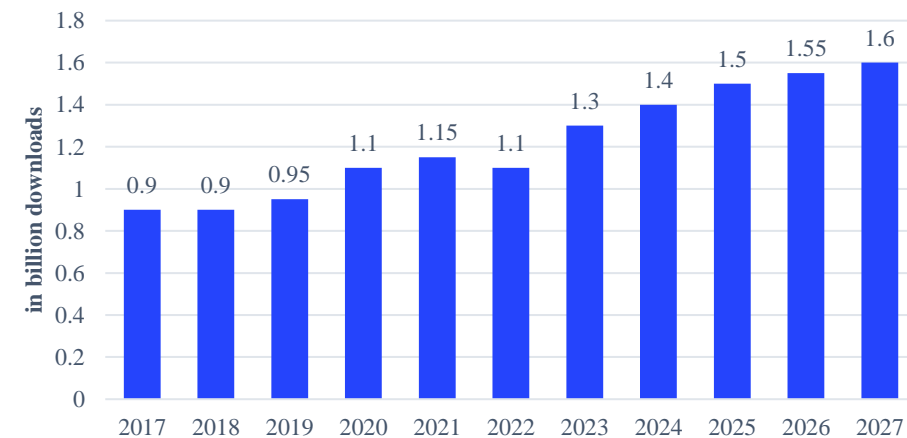
## Casino mobile games: Steady revenue growth

- After the significant decline in 2020, revenue from casino games remained steady growth from 2021 to 2023. The total revenue of casino games is expected to grow at an annual growth rate (compound annual growth rate 2022-2027) of 7.04% and the market size is expected to reach \$1.42 billion in 2027.
- On the advertising chart of the top 10 casino games, slot games occupied 6 spots, followed by casual casino games and poker/card games. Among all casino games with active creatives, a majority of them were slot games.

Revenue trend of casino mobile games market



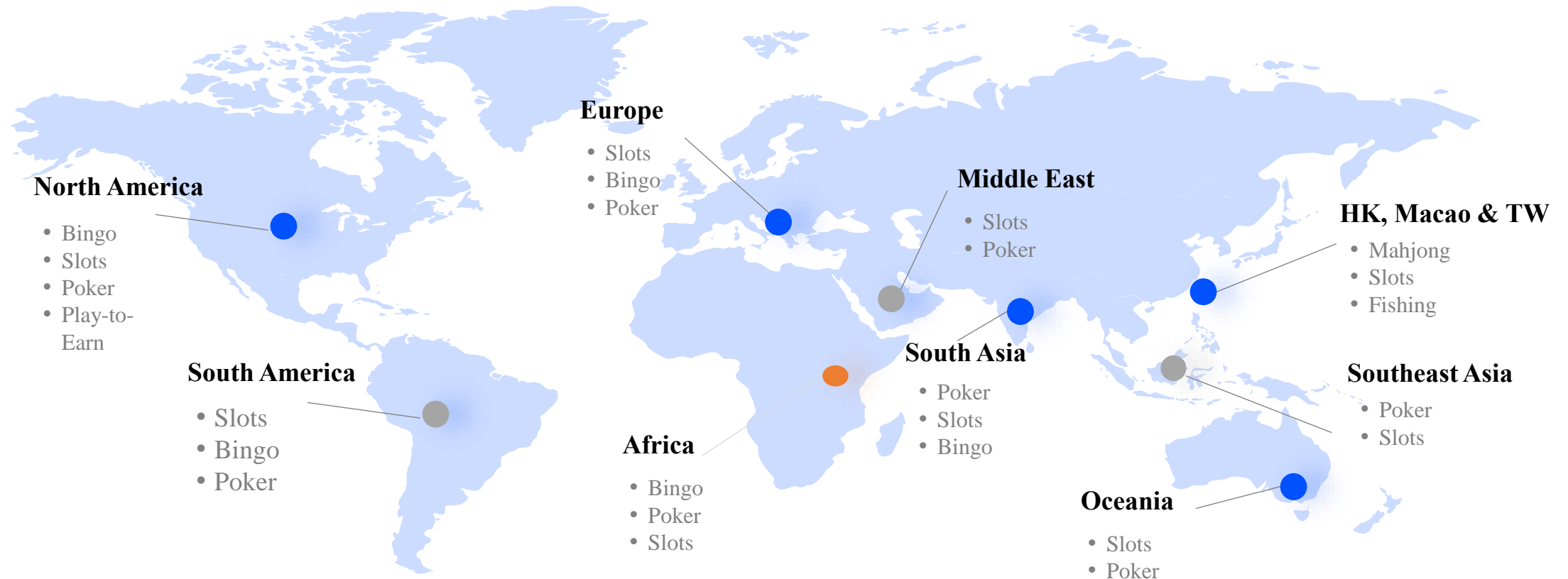
Downloads trend of casino mobile games market





# Distribution of different types of casino games

In terms of types, slots, Bingo, and poker were the most popular across the world. However, China's HK, Macao & TW regions focused more on mahjong and fishing.





# With massive advertising and increasing buyings, old games seized all spots on the chart

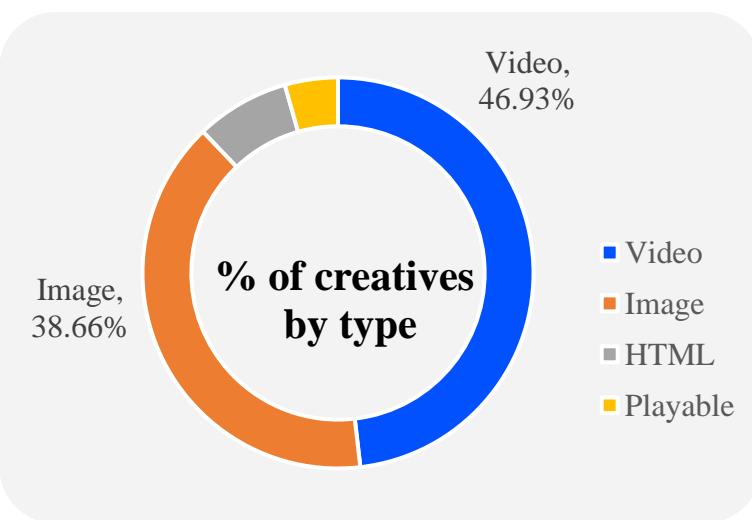


iOS			Android		
1	<b>Jackpot World™</b> Bole Games	SLOT	1	<b>Jackpot World™</b> Bole Games	SLOT
2	<b>Bingo Aloha</b> Century Games	Bingo	2	<b>Lucky Tongits</b> HighLight Studio	Card
3	<b>First Games</b> Paytm Mobile Solutions	Sports	3	<b>Teen Patti Satta</b> Christian Vernon	Card
4	<b>Solitaire - Klondike Solitaire</b> Doodle Mobile	Card	4	<b>Coin Master</b> Moon Active	SLOT
5	<b>Vegas Hit™</b> Wowspin Technology Limited	SLOT	5	<b>Crazy Fox</b> ASTAK TECH	SLOT
6	<b>Jackpotland</b> Betta Games	SLOT	6	<b>Tongits Go</b> Spirejoy SG	Card
7	<b>Four Winds Online Casino MI</b> FourWinds	SLOT	7	<b>Jackpot Master™ Slots</b> Zeroo Gravity Games	SLOT
8	<b>RummyCircle</b> PLAY GAMES24X7 PVT. LTD.	Card	8	<b>Megaways Gonzo</b> David Moreno Cordon	SLOT
9	<b>Cash Frenzy™</b> Bole Games	SLOT	9	<b>Cash Club Casino</b> Bole Games	SLOT
10	<b>Jackpot Master™ Slots</b> Zeroo Gravity Games	SLOT	10	<b>Cash Tornado™ Slots</b> Zeroo Gravity Games	SLOT

## Slots dominated the chart, forcing card & sports games to try new ways

As Bole Games' hit game, [Jackpot World™] has been on the top chart of advertising. According to the data captured by SocialPeta, the game had about 11K deduplicated creatives in total in Q1 2023.

Other Chinese game companies on the chart: Century Games, Doodle Mobile, Betta Games, and Zeroo Gravity Games.





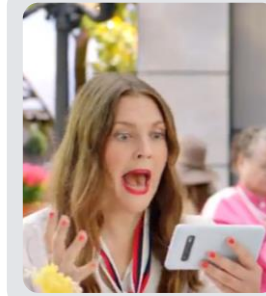
# Classic Bingo, with a complex increase

## Bingo Blitz Playtika



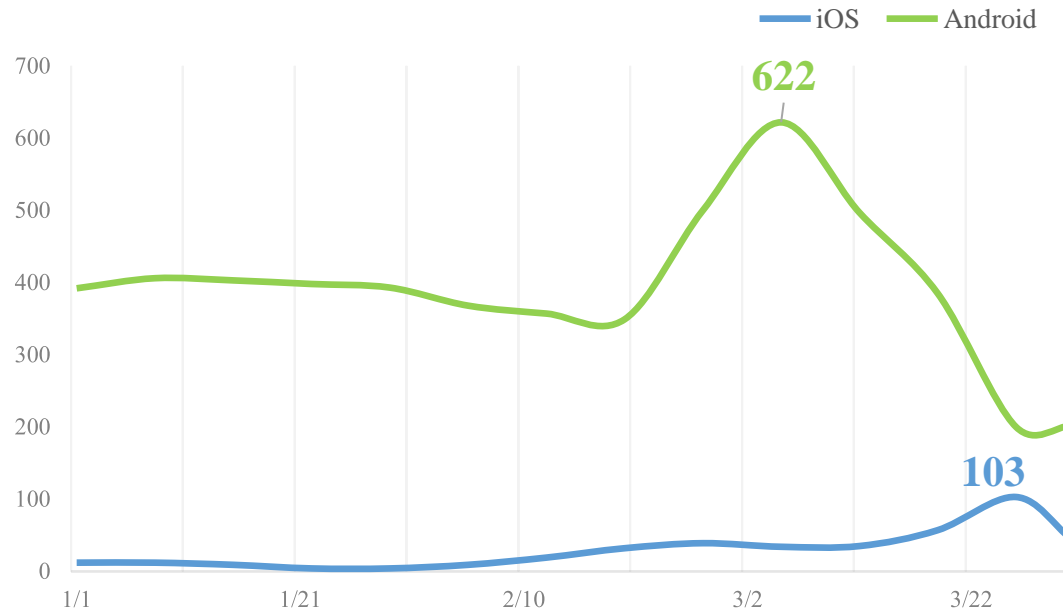
[Bingo Blitz], a mobile casino game under the Playtika, can be considered the highest-grossing bingo game globally. With outstanding social gameplay and aggressive promotion on social platforms such as Facebook, along with continuous iterations of its own gameplay.

[Bingo Blitz] is dominated by bingo play, supplemented by casual and social. Nowadays, [Bingo Blitz] is still the top revenue earner in the bingo game casino hand game category 11 years after its release.

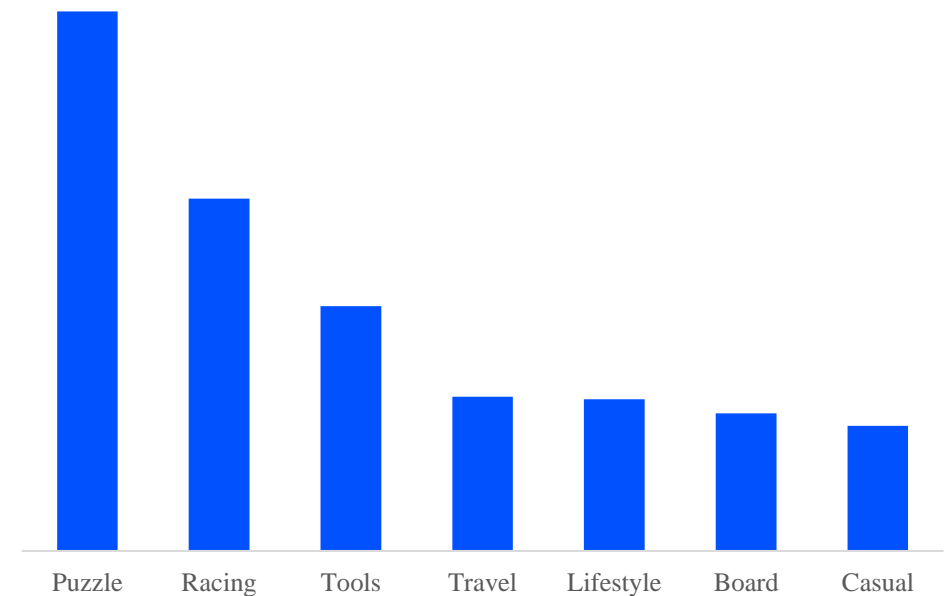


### Live-action stories + great prizes

The female player's exaggerated expression at the message of winning is very eye-catching. Then the waiter talks just in time to lead to downloading the game. The story feels real but also full of drama. The conversion rate is unbelievably high.



### Top Media of Advertising





# Some New Casino Games in Q1

Game demo playing, message of winning, news broadcasting, and other live-action creatives, are more convincing and tempting.

## Golden Slots Party

bigoneGameStudio



Click to view the complete creative

## Pharaoh's Gain

onindusocu



Click to view the complete creative

## Teen Patti King

tean\_MumbaiPanda



Click to view the complete creative

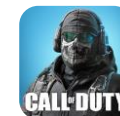


**03**

# Insights into Mobile Game Marketing in Top Countries/Regions



# Insights into American Market



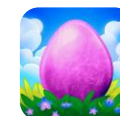
Established in 2008, the company has many classic IPs including “Warcraft”, “Call of Duty”, and “Diablo”.



NIANTIC



Established in 2010, the company is good at developing AR games based on well-known IPs.



Established in 2007, the company focuses on social games and casino games.

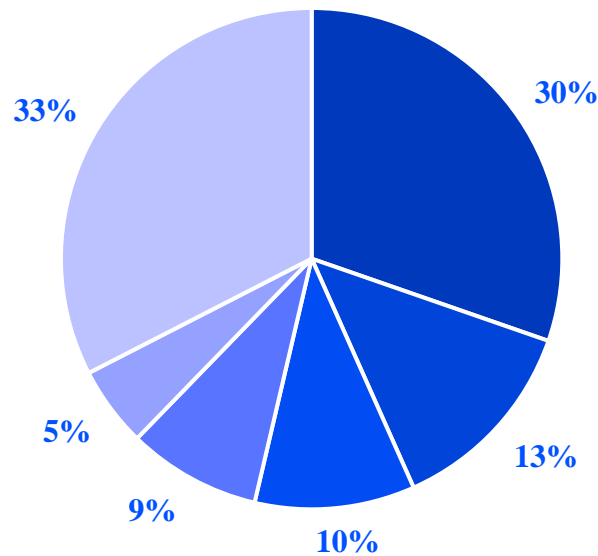


# Observation of Top Game Genres in America

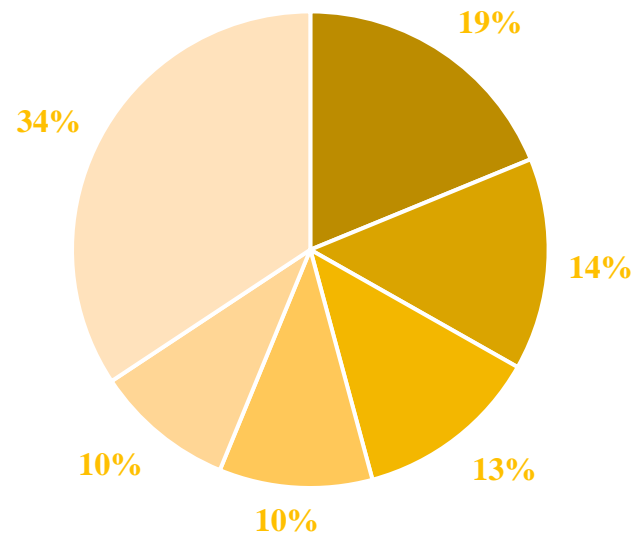
Both simulation games and RPGs have been doing great in terms of downloads, revenue, and advertising.

- As a major advertiser in the American market, puzzle games have been replacing casual games as the most cost-effective game genre.

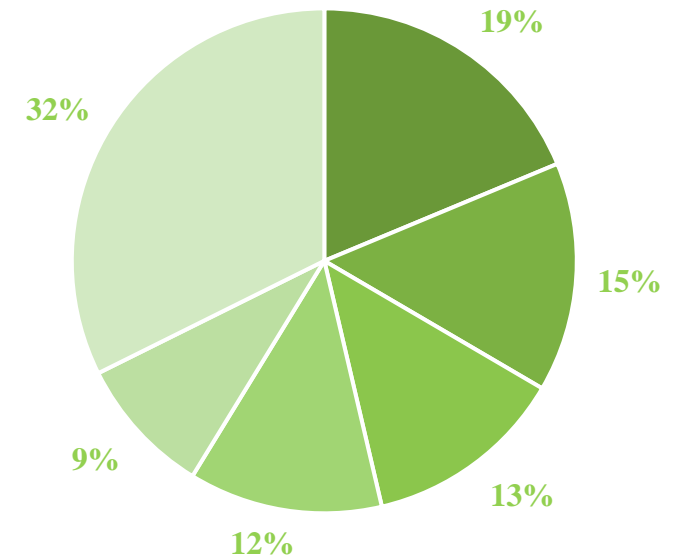
Top game genres by advertising



Top game genres by revenue



Top game genres by downloads



■ Casual ■ Puzzle ■ Simulation ■ Action ■ RPG ■ Other ■ RPG ■ Strategy ■ Puzzle ■ Simulation ■ Casino ■ Other ■ Puzzle ■ Casual ■ Action ■ Simulation ■ Arcade ■ Other



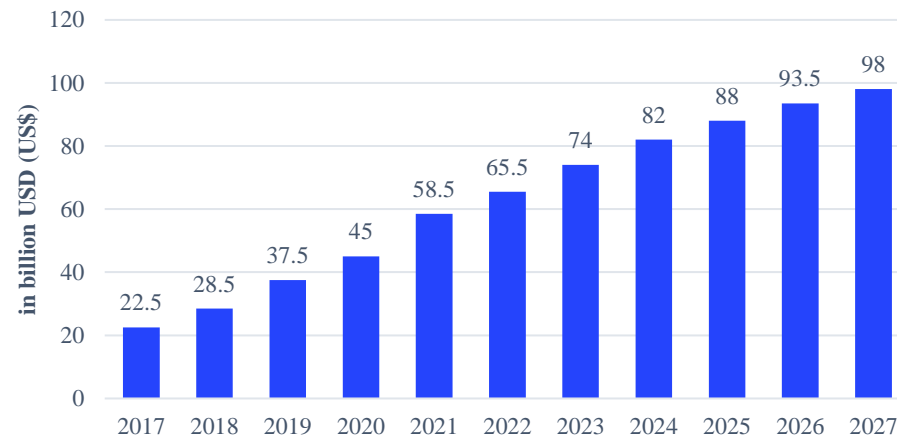


# Insights into American Mobile Game Market

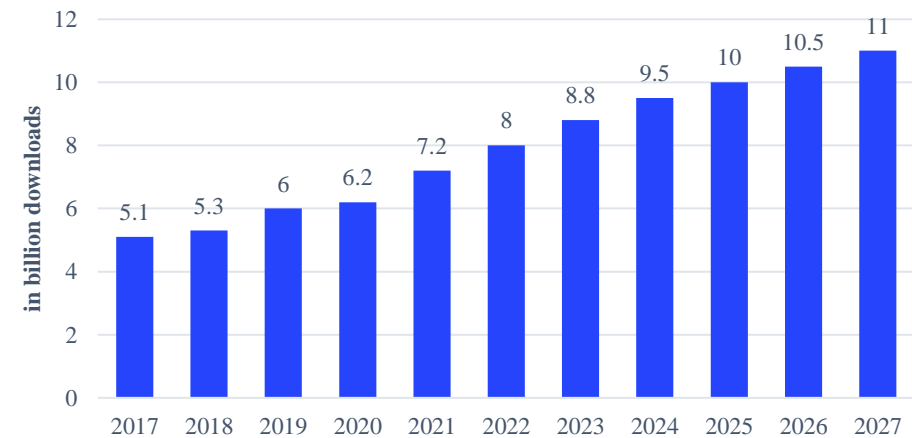
**American mobile game market: there was a slowdown in spending growth of American mobile game users in the post-pandemic era**

- Puzzle, chess & card, and strategy games were the highest-grossing in America.
- In terms of downloads, hyper-casual mobile games accounted for 34% in the American market, much higher than any other game genres.

**Revenue trend of American mobile games market**



**Downloads trend of American mobile games market**





# Analysis of Top Mobile Games' Advertising in America



## Street Fighter: Duel A PLUS JAPAN

**Game intro:** licensed by Capcom, the first RPG on mobile in the “Street Fighter” series.

**Gameplay:** Action + RPG

**Art style:** 3D cartoon

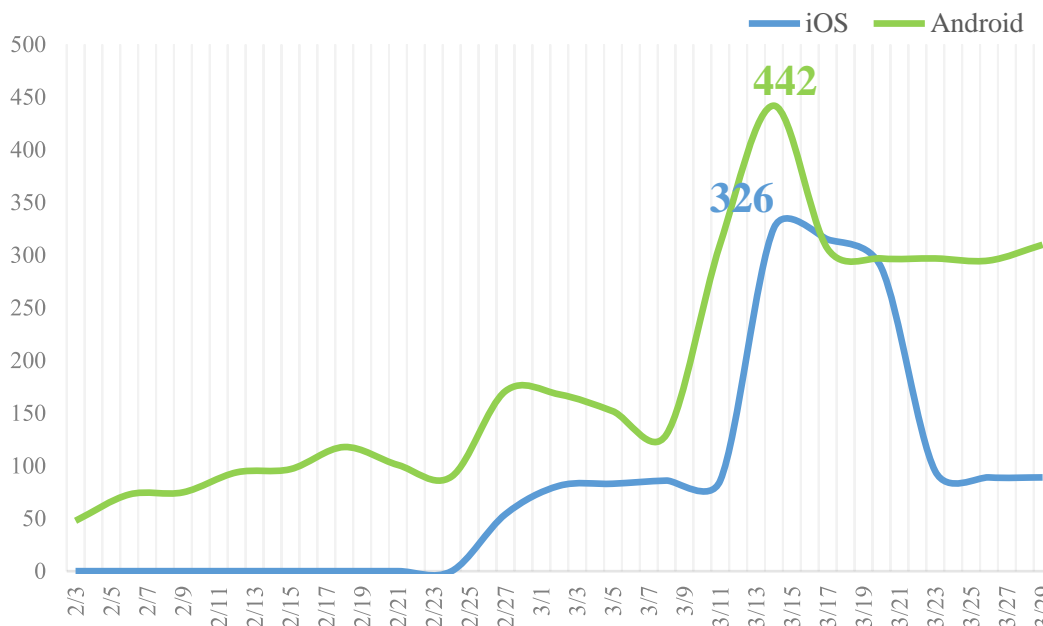
**Game genre:** classic Japanese action game series



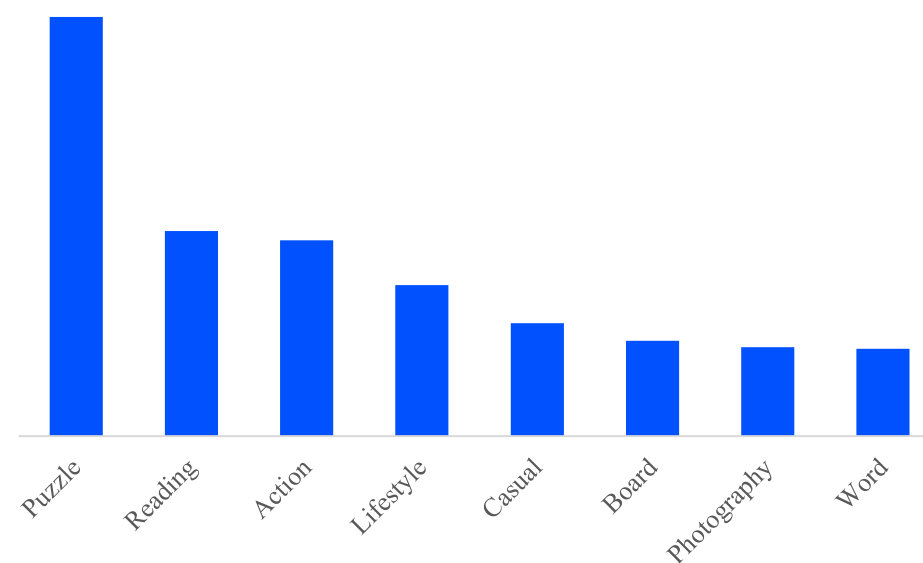
### Role Mocking, Pursue the common feeling

The streamer talks about himself, guiding users to focus on the role of mockery after failure, inspiring players to convert after substituting themselves

Game's Advertising Trend



Top Media of Advertising



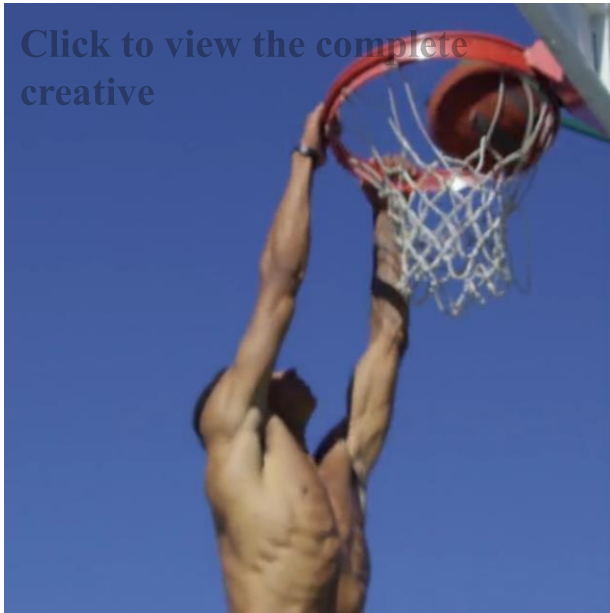


# Some New Games in America

Among all simulation games, the more outstanding ones were collection and training games and business simulation level-up games.

## NBA All-World

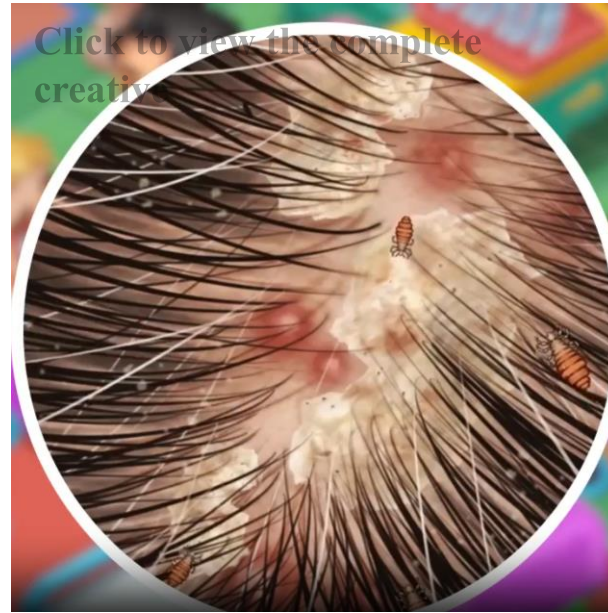
Basketball + AR



Click to view the complete creative

## Happy Hospital

Doctor + Simulation



Click to view the complete creative

## Cat Snack Bar

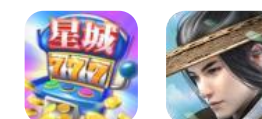
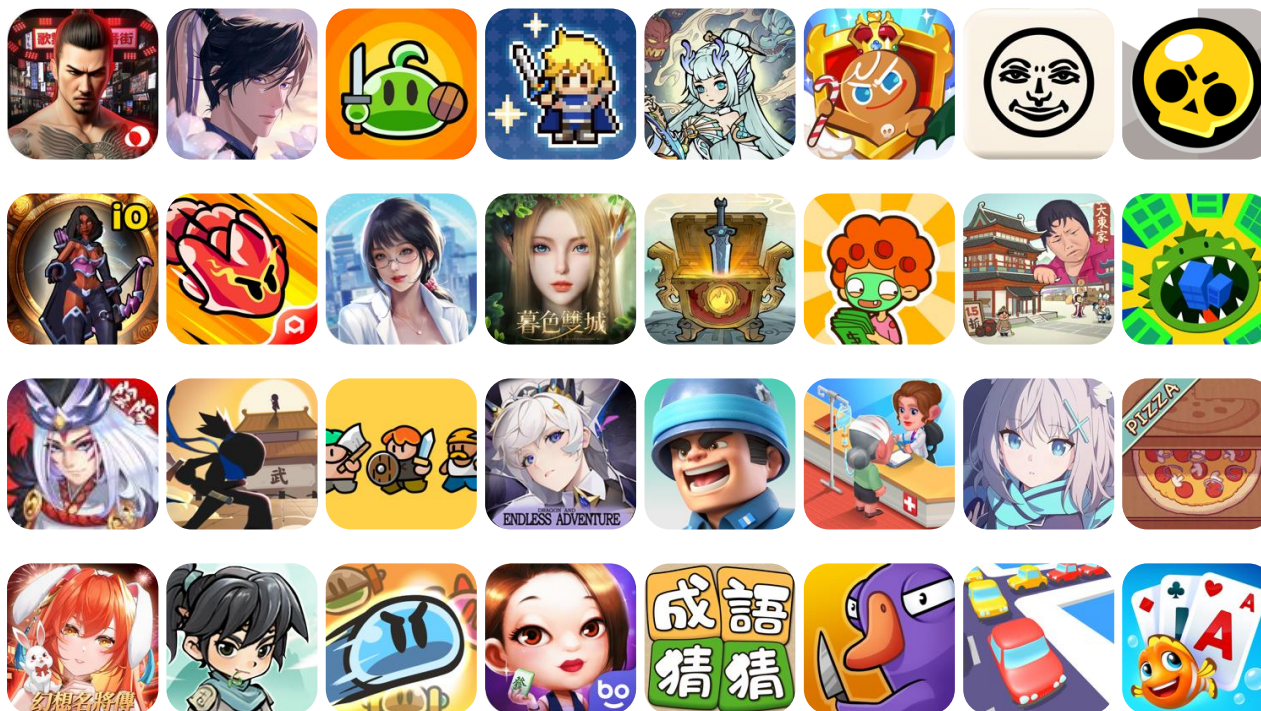
Cats + Simulation



Click to view the complete creative



# Insights into Mobile Game Market of China's HK, Macao & TW regions



## IGS®

Established in 1991, the company focuses on casino and arcade games

## 遊戲種子 GAME BEANS

Established in 2016, the company focuses on RPGs and publishing in Hong Kong, Macao, and Taiwan

## WANIN

### 網銀國際

Established in 2008, the company focuses on casino and publishing in Hong Kong, Macao, and Taiwan

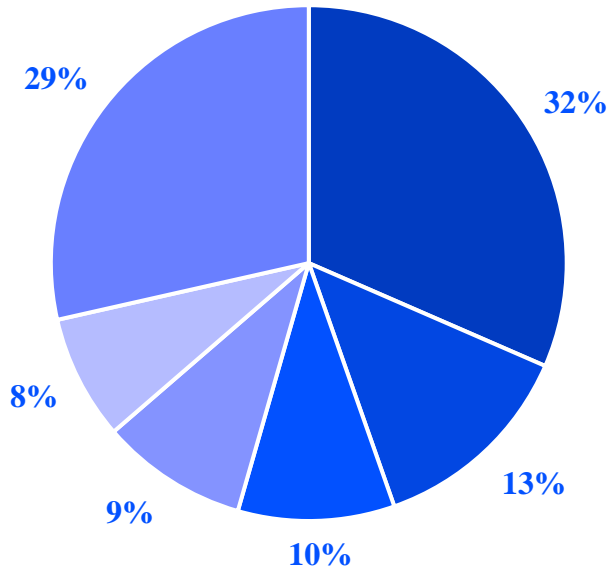


# Observation of Top Game Genres in China's HK, Macao & TW

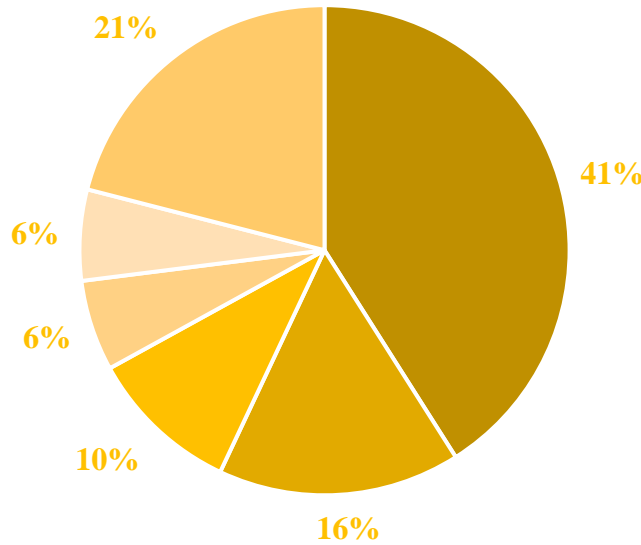
Revenue of RPGs accounted for the highest. Top games by downloads were of various genres.

- Same as in South Korea, RPGs stood out in HK, Macao & TW and became the game genre contributing the highest share of revenue and downloads.
- Fewer casual and puzzle games ad creatives were released and the top games by downloads were of more complicated game genres.

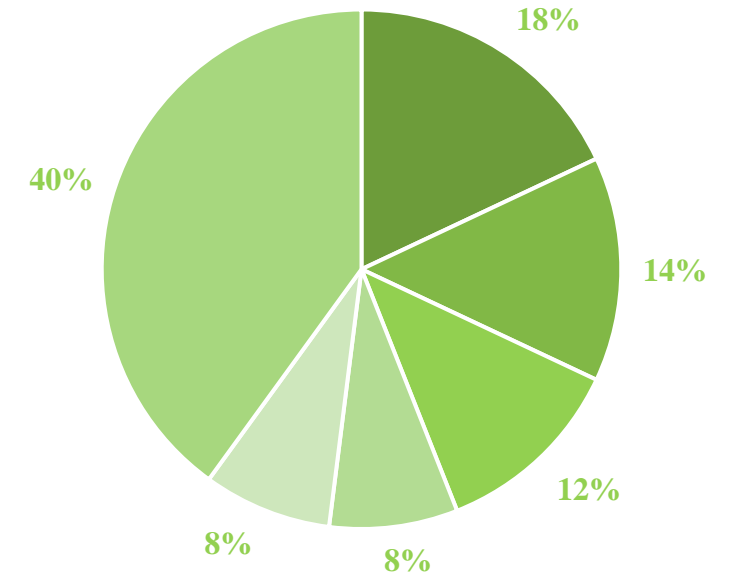
Top game genres by advertising



Top game genres by revenue



Top game genres by downloads



■ Casual 
 ■ Puzzle 
 ■ Simulation 
 ■ RPG 
 ■ Action 
 ■ Other 
 ■ RPG 
 ■ Casino 
 ■ Strategy 
 ■ Adventure 
 ■ Card 
 ■ Other 
 ■ RPG 
 ■ Casual 
 ■ Puzzle 
 ■ Adventure 
 ■ Simulation 
 ■ Other

Source: SocialPeta - APP Intelligence; collecting data of regional advertising, and data of downloads and revenue from App Store & Google Play  
 Date Range: Jan. 2023 - Mar. 2023

# Analysis of Top Mobile Games' Advertising in China's HK, Macao & TW



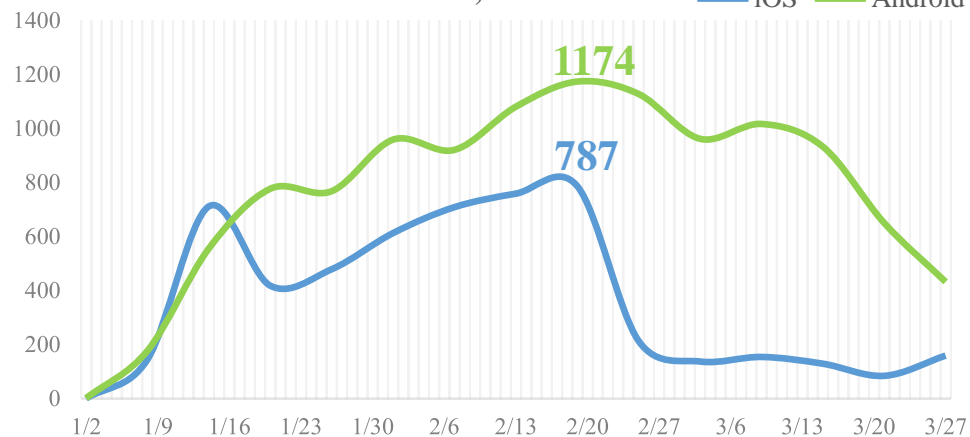
## 馬賽克英雄 More2Game

**Game intro:** It applies the art style of retro pixel, featuring real-time battle card, RPG, and roguelike. The game helped its developer More2Game occupy a share of the market. The game was on the iOS free game charts in Hong Kong, Macao, and Taiwan upon its release, and grossed over \$50 million in January.

**Gameplay:** Card RPG

**Game genre:** pixel & adventure

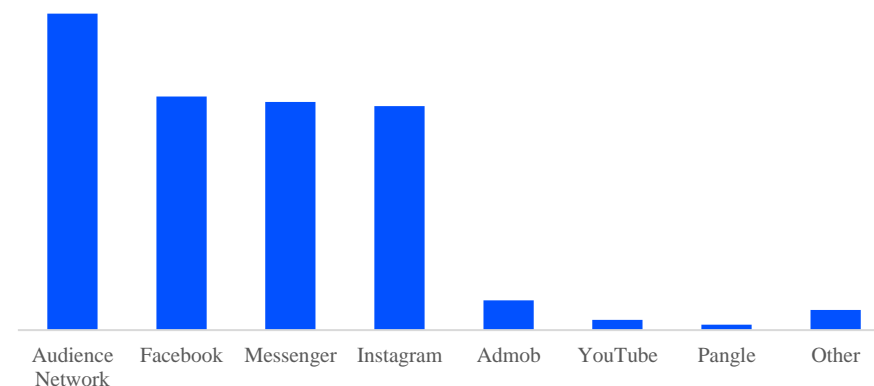
Advertising Trend in China's HK, Macao & TW



## Perks display + Real people endorsement

Like traditional RPG's marketing, the game chose to hire an endorser to promote the game when it was released in HK, Macao & TW. And the in-game gacha perks were also key to its advertising effect.

Advertising platforms for the last 90 days





# Some Popular New Games in China's HK, Macao & TW

Among all new games in China's HK, Macao & TW, MMO games were the most competitive genre, and also released relatively more ad creatives.

Besides, new games of female-oriented, card anime styles were also popular in China's HK, Macao & TW.

## 星球：重啟

Sci-fi MMO



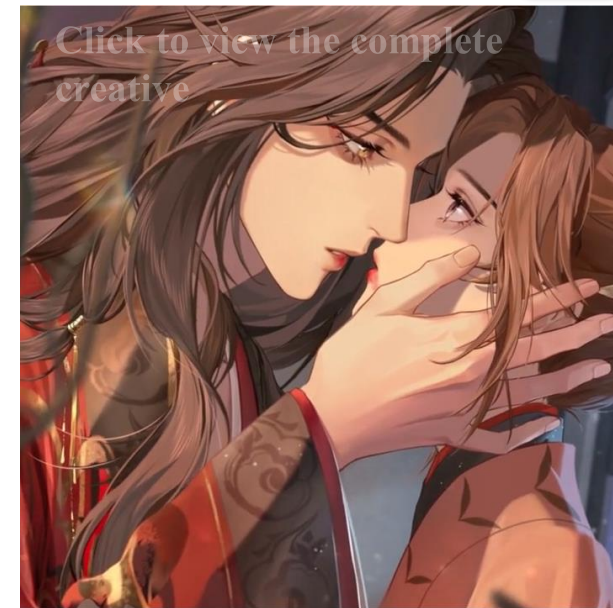
## 暮色雙城

Xianxia MMO



## 代號鳶

Female-oriented and featuring the Three Kingdoms





# Observation of Southeast Asian Mobile Game Market



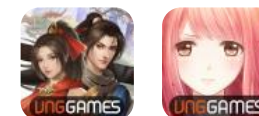
Established in 2009, the company focuses on shooter and publishing games.



**ONESOFT**



Established in 2010, the company focuses on shooter and hyper-casual games.



Established in 2004, the company is good at publishing games in Southeast Asia.



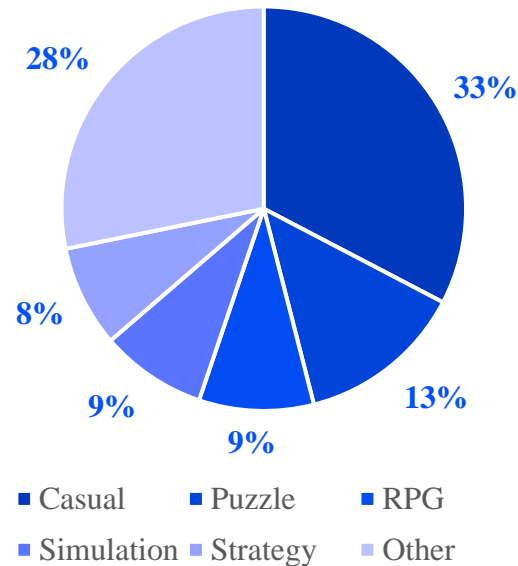


# Observation of Top Game Genres in Southeast Asia

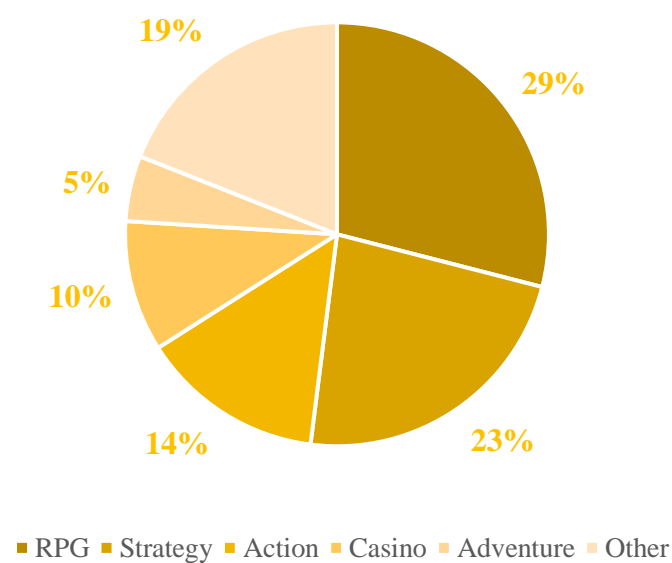
## RPGs spent more effort in marketing. Top games by downloads were mostly casual games

- The whole Asian-Pacific region favored RPGs. Southeast Asia spent the most effort on marketing. And RPGs contributed the highest percentage of revenue.
- Action and arcade games stood out with their downloads. Local developers, especially Vietnamese developers were very good at hyper-casual games.

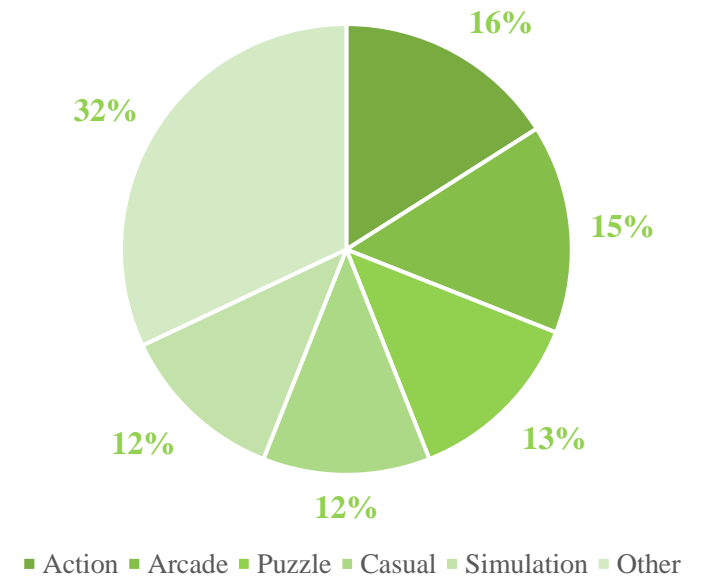
Top game genres by advertising



Top game genres by revenue



Top game genres by download



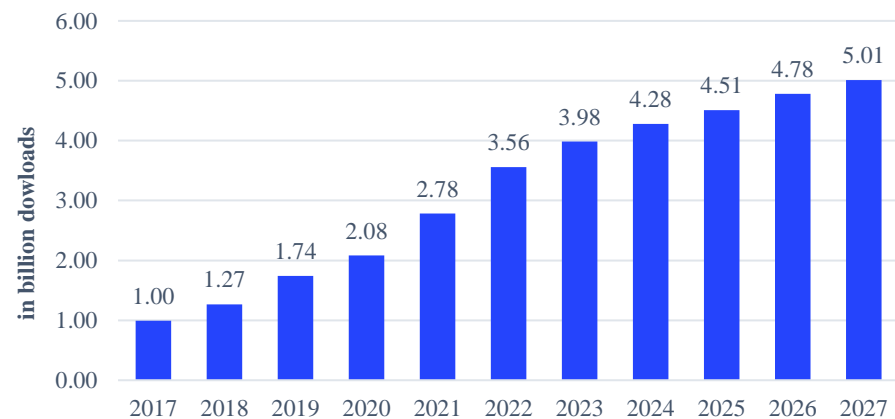


# Insights into Southeast Asian Mobile Game Market

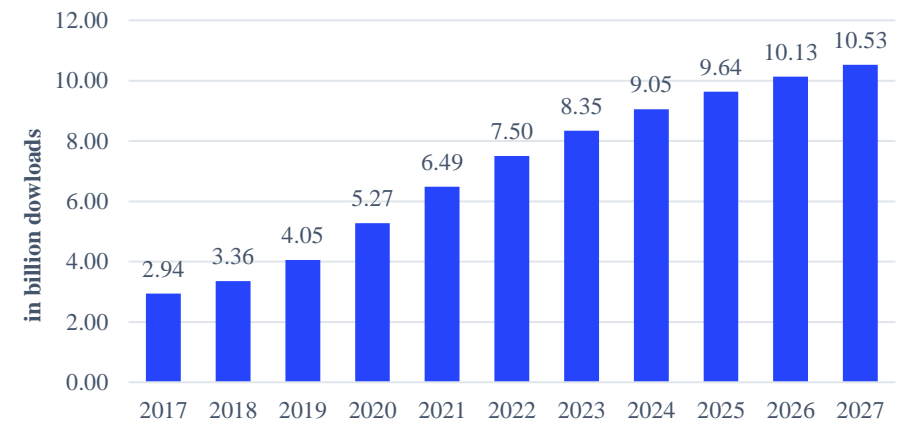
## Southeast Asian mobile game market: One of the regions with the fastest revenue growth

- Southeast Asia is the fastest-growing region for mobile game revenue. The mobile game revenue will increase by about 90% during 2020-2023, far beyond the global average growth.
- In Southeast Asia, it's obvious that Android downloads and revenue accounted for higher percentages and grew faster than iOS.
- Shooter and MOBA games were the most popular in Southeast Asia. Casual games also contributed a fair share to the mobile game download of Southeast Asia.

Revenue trend of Southeast Asian mobile game market



Download trend of Southeast Asian mobile game market





# Analysis of Top Mobile Games' Advertising in Southeast Asia



## Mobile Legends: Bang Bang MOONTON

**Game intro:** Mobile Legends: Bang Bang (MLBB) is widely known in Southeast Asia. In September last year, the game was chosen for Esports at the 2022 Southeast Asian Games for the third time. And great public attention was drawn to MLBB Tournament in Southeast Asia.

**Gameplay:** MOBA

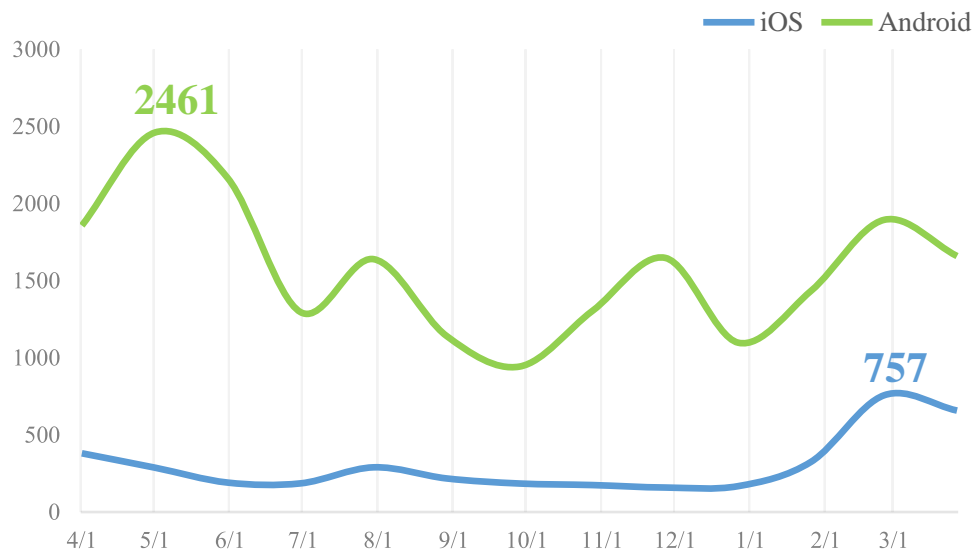
**Game genre:** fantasy



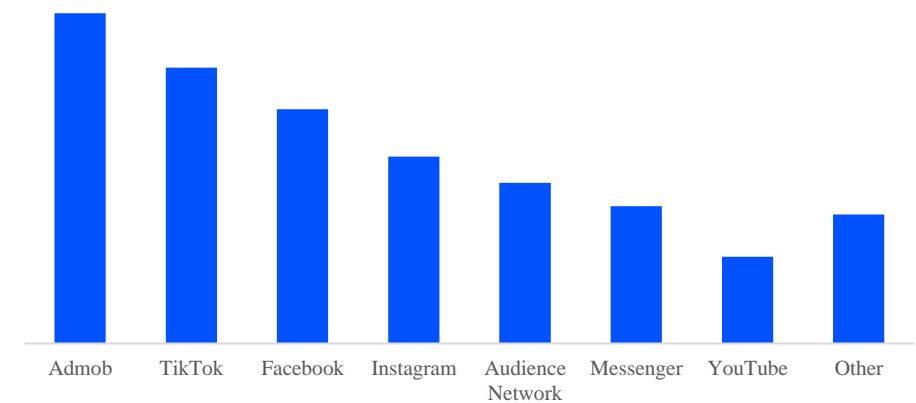
### Work with TikTok in publicizing MLBB Tournament

The game released significantly more creatives on TikTok in 2023. It greatly enhanced its influence in Southeast Asia with the help of UGC and tournament-related content.

### Global Advertising Trend



### Advertising platforms for the past 1 year



Source: SocialPeta - Advertiser Analysis: real-time monitoring of advertisers' advertising performance, based on data retrieved from backend data sources.



# Some Popular New Games in Southeast Asia in Q1

Most of the popular new games in Southeast Asia are developed by Chinese and Korean companies, most of which are MMORPG games.

It is worth mentioning that we must pay attention to each country's language and cultural characteristics, and we cannot generalize them.

## Revelation Mobile

Chinese popular IP MMO



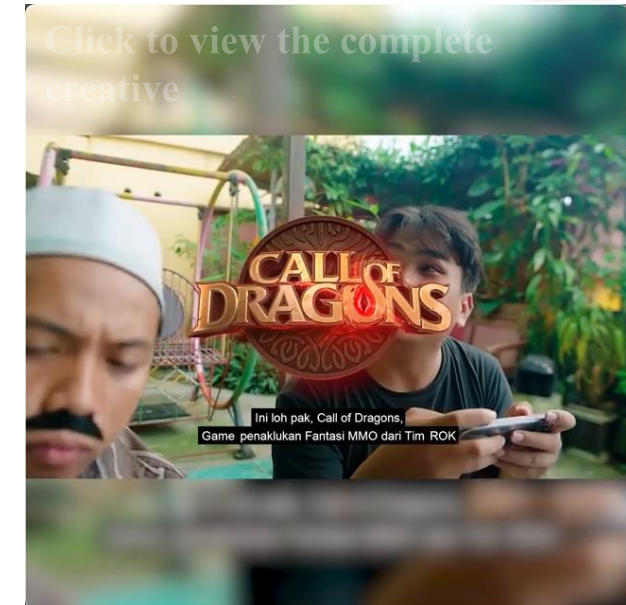
## Summoners War: Chronicles

A sequel to the famous card games MMO



## Call of Dragons

Cartoon fantasy SLG





# Observation of Middle East Mobile Game Market



Established in 2016, the company focuses on board and social games.



Established in 2011, the company focuses on casual and simulation games



Established in 2004, the company focuses on puzzle games.

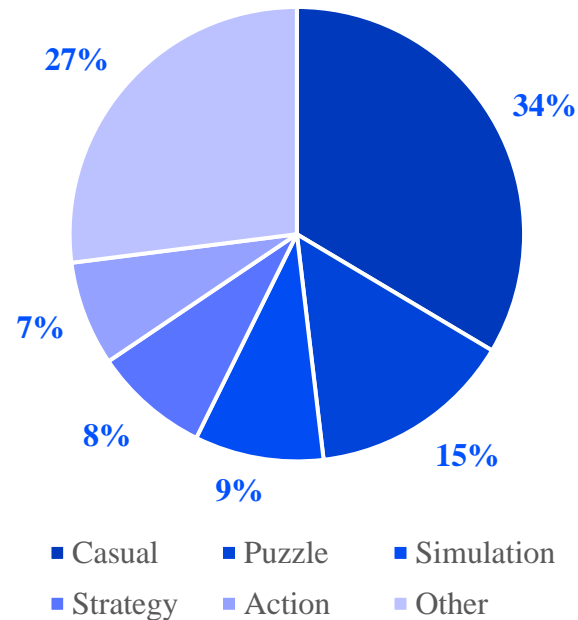


# Observation of Top Game Genres in Middle East

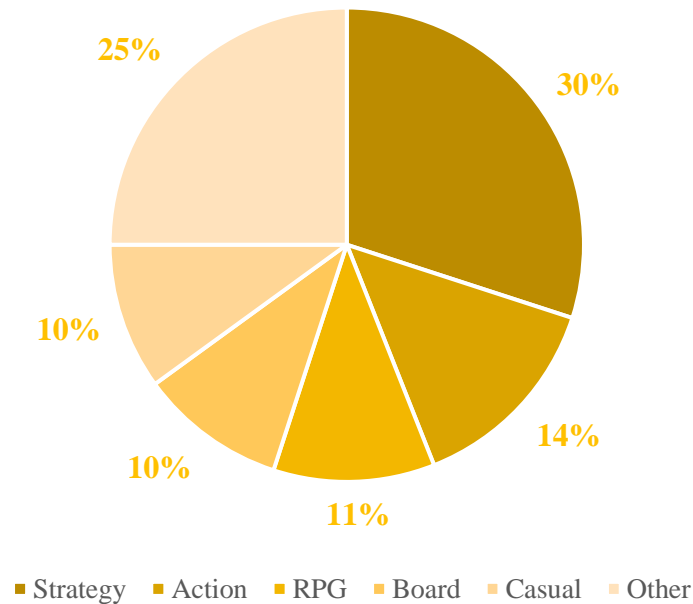
Strategy games reported outstanding revenue. PUBG Mobile was very popular.

- Strategy games contributed the highest percentage of revenue, accounting for over 30%, and most of the games were from Chinese companies.
- The local gamers also love games with action and shooter elements, a typical example of which is PUBG Mobile.

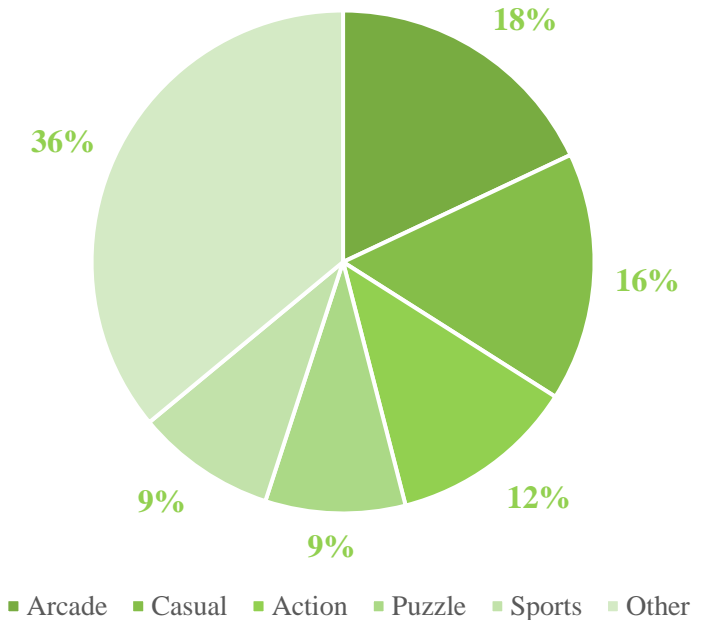
### Top game genres by advertising



### Top game genres by revenue



### Top game genres by downloads



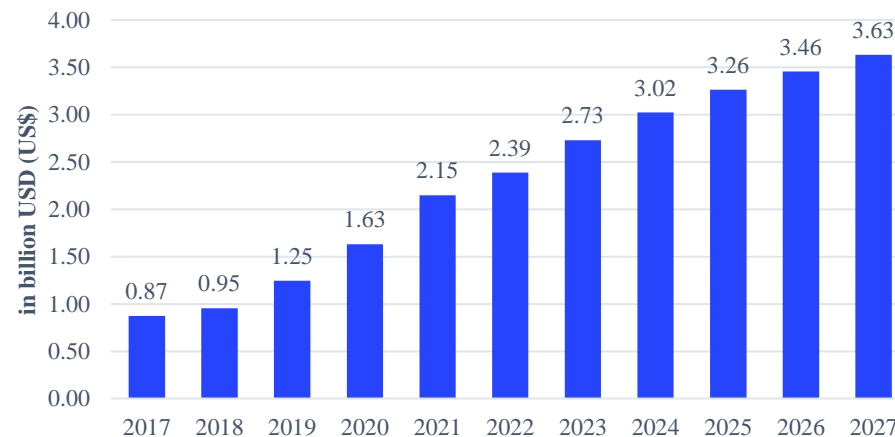


# Insights into Middle Eastern Mobile Game Market

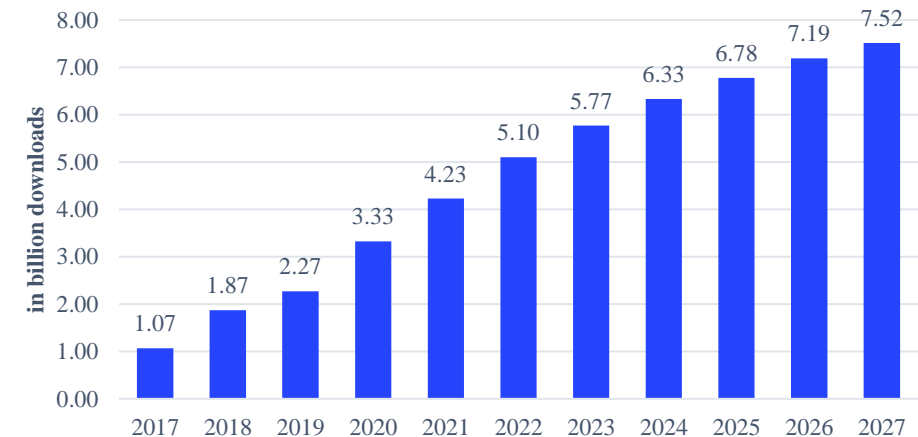
## Middle Eastern mobile game market: Steady growth in the spending of Middle East mobile game users

- Analysis of UAE's mobile game market: It had the widest coverage of internet in Middle East and a majority of mobile games were male-oriented.
- Analysis of Saudi Arabian mobile game market: More paying players and mid-core and hard-core games were the highest-grossing.
- Analysis of Turkish mobile game market: Rapid growth in mobile game market size, revenue, and users' gaming time.
- Analysis of Egyptian mobile game market: An emerging market that mobile game companies across the world competed for.

### Revenue trend of Middle East mobile game market



### Download trend of Middle East mobile game market





# Analysis of Top Mobile Games' Advertising in Middle East



## Yalla Ludo Yalla

**Game intro:** Game intro: Yalla Ludo is a popular platform in Middle East that allows you to have real-time voice chat and play Ludo or Domino with your friends online. Combined with voice chat service, the game is also a social platform.

**Gameplay:** airplane chess + Chinese dominoes

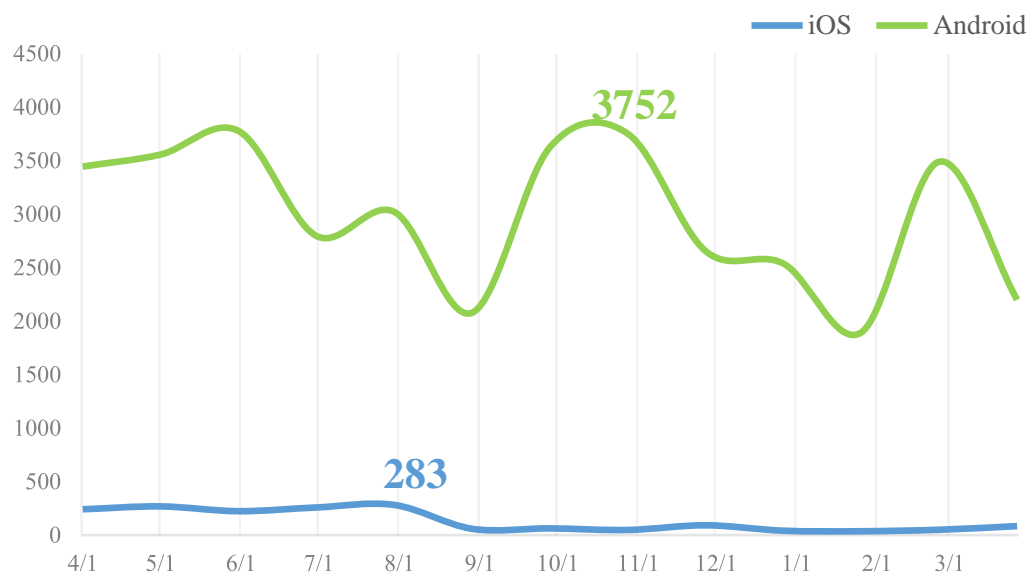
**Game genre:** board, casual



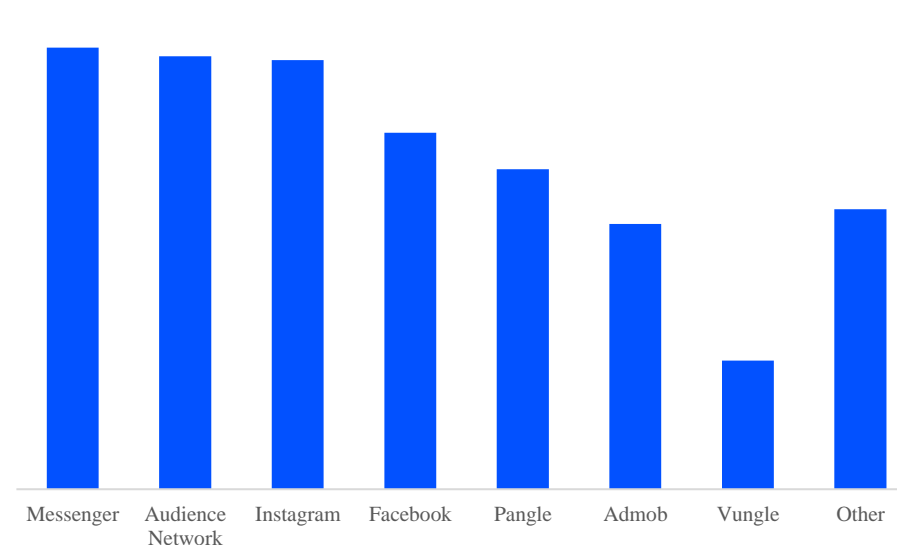
### Social is a key element to game marketing

Having started as social service, Yalla finds it's important to add social elements to its marketing. Besides the creative showing a phone calling, there're also creatives about asking friends in a chatting room to play games together.

### Global Game Advertising Trend



### Advertising platforms for the past 1 year







# Some Popular New Games in Middle East in Q1

Most of the popular ones are hyper-casual games, and games with competitive elements are more popular with local players.

No new mid-core and hard-core games stood out in Middle East. Most top mid-core and hard-core games were from global companies.

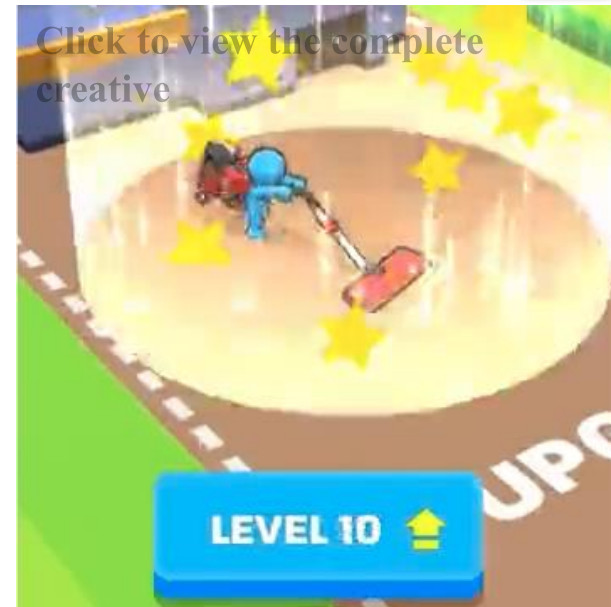
## Avatars Saga

Anime-style MMO



## Hoarding and Cleaning

Hyper-casual



## Ammo Fever

Hyper-casual



# 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 1.3 billion advertising data



Covering 5.1 million advertisers



Multidimensional in-depth analysis of products



Exclusive data and traffic intelligence



Covering 70 countries/regions and over 70 channels worldwide



Updated hourly  
Over 1 million ad data are updated each day

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# THANKS

2023Q1 GLOBAL MOBILE GAME MARKETING REPORT

广大大