



2022 The Israeli Mobile Game Market Report

Backed by new insights from SocialPeta and GameIS, this report empowers global advertisers and publishers to learn more about the Israeli mobile game market.

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.

2. Data Cycle and Indicators

Overall date range of the report: Jan-Jul 2022

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

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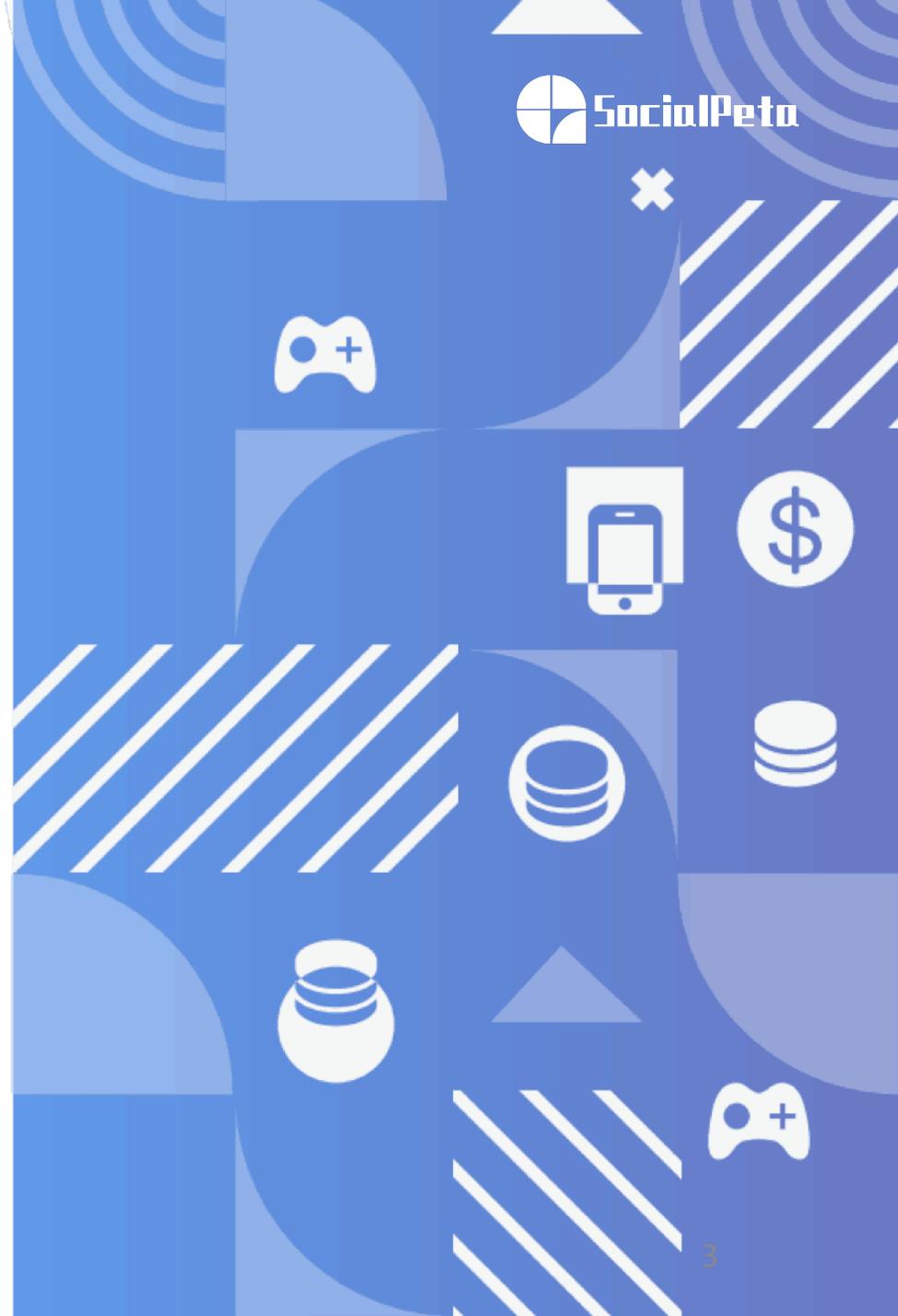
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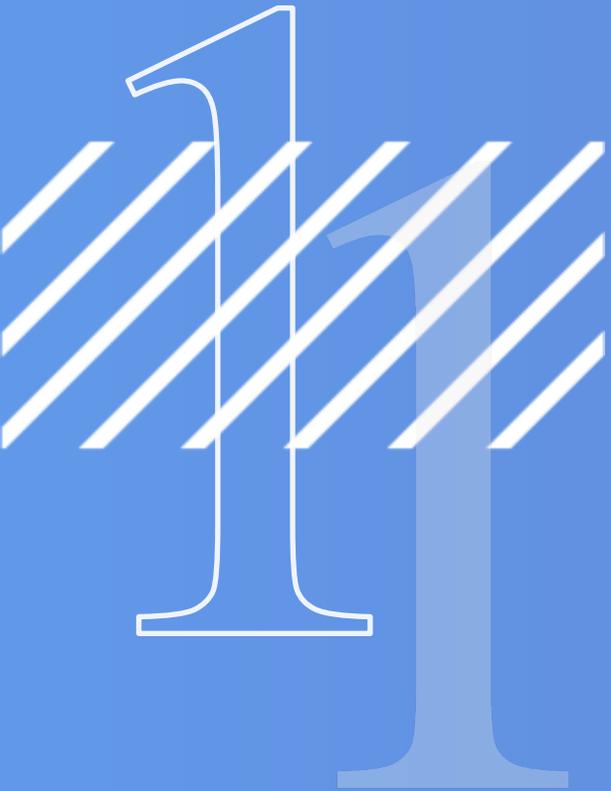
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Analysis of The Israeli Mobile Game Market

Israeli Mobile Game Market Overview



\$9 billion in revenue



Mobile is the most popular platform for publishing



200 companies



12 academic programs and courses



14000 Employees



Large number of notable Exits and IPOs



Social/Casual leading investment category

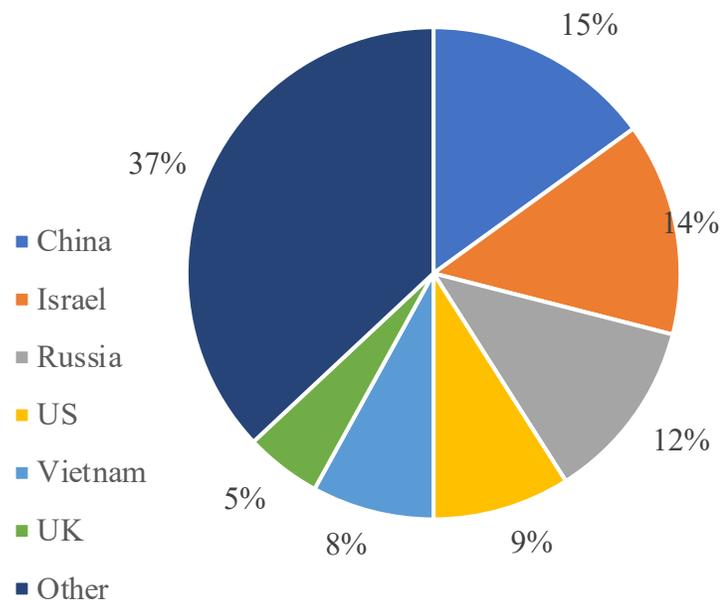
Analysis of The Israeli Mobile Game Publishers

Israeli game companies mostly focus on **social** and **hyper-casual** games with **China** being their biggest market

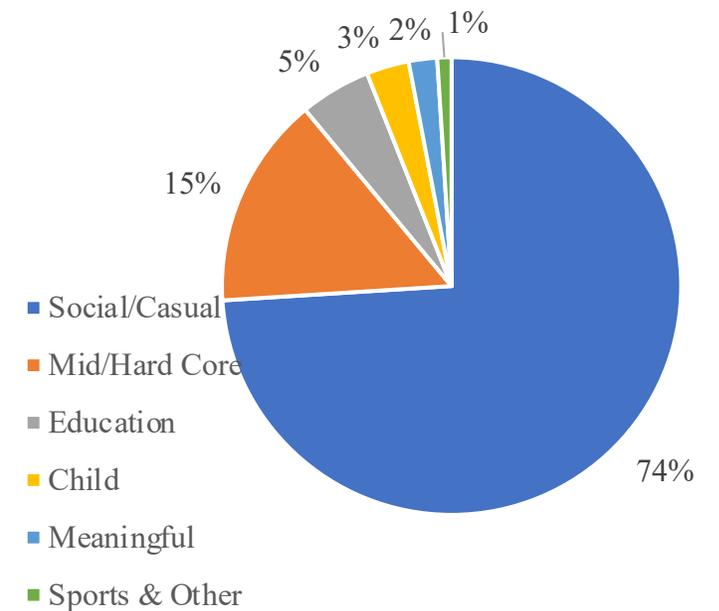
Top 5 genres of Israeli mobile games published in 2021:

1. Casual/Hyper-Casual
2. RPG
3. Simulation
4. Social gambling
5. Puzzle

Global Installation of Israeli Mobile Games in 2021



Distribution of Israeli mobile game workers by game genre



Israeli Mobile Game Market Overview



COVID-19 pandemic boosted the growth of mobile game market

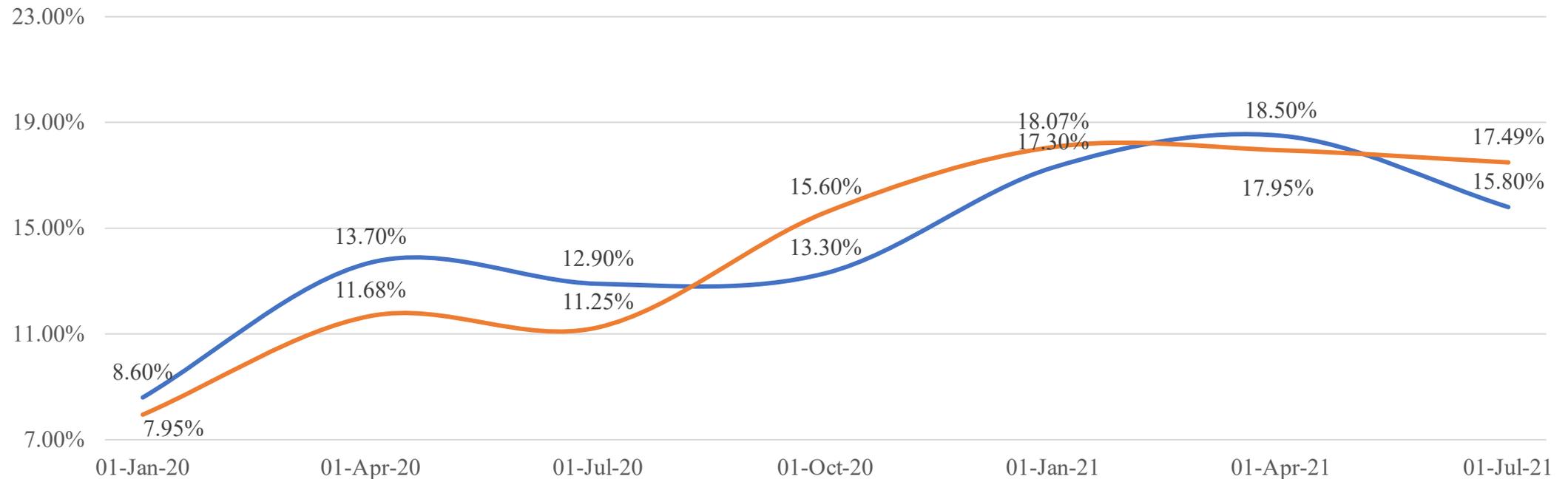
Due to the global COVID-19 pandemic, more and more Israeli users started to install mobile games and make in-app purchases. In the post-pandemic era, it has been a habit for most people to entertain themselves by playing games and spending money in game.



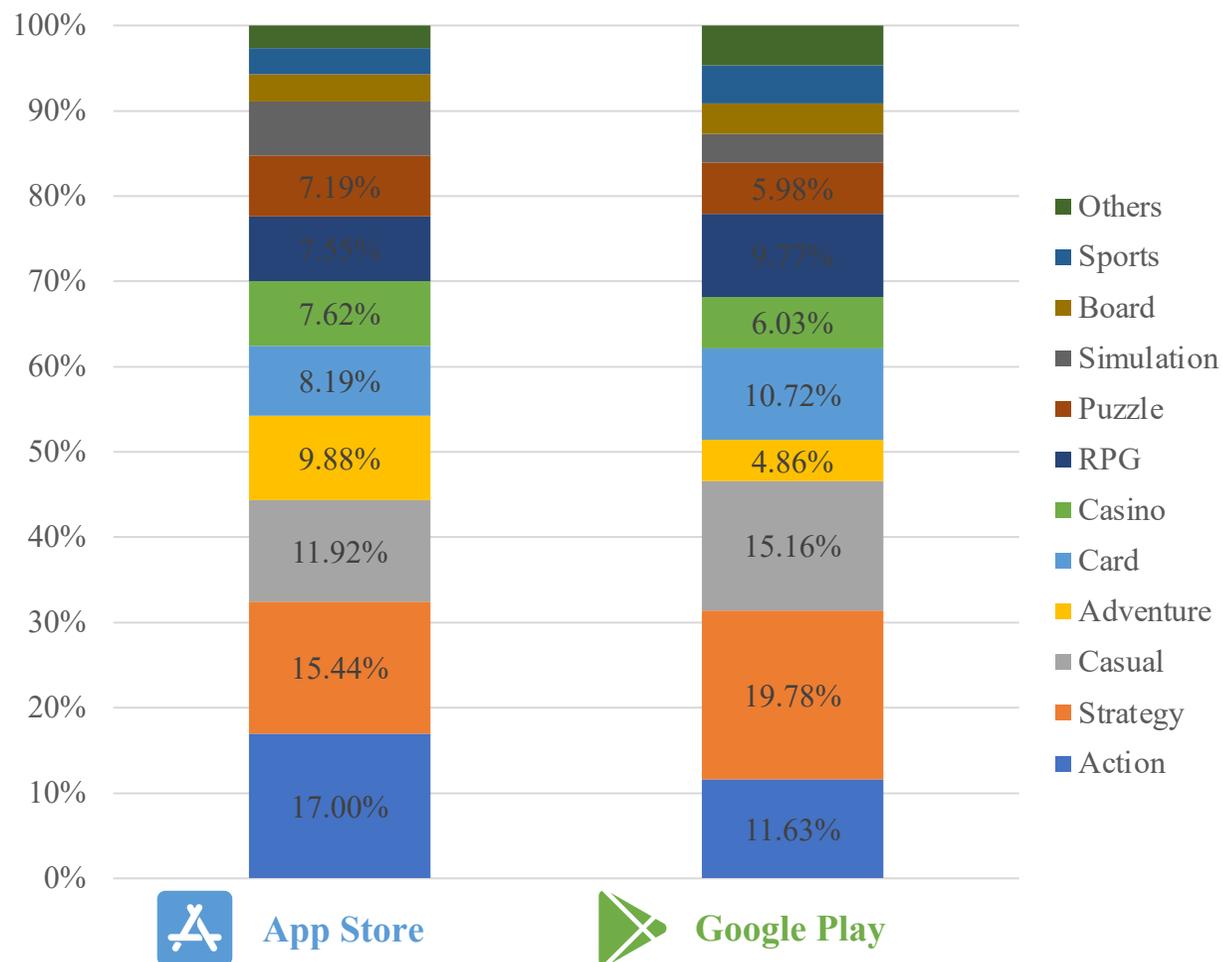
Installation



In-App Purchase



Revenue of Israeli Mobile Games by Genre



Action and strategy games generated the highest percentages of revenue. Action games had the highest percentage of revenue on the App Store, while strategy games contributed about 20% of total revenue on Google Play.

In terms of total revenue, [Coin Master] developed by the local company Moon Active was the most outstanding, followed by [PUBG Mobile] and [Zynga Poker].

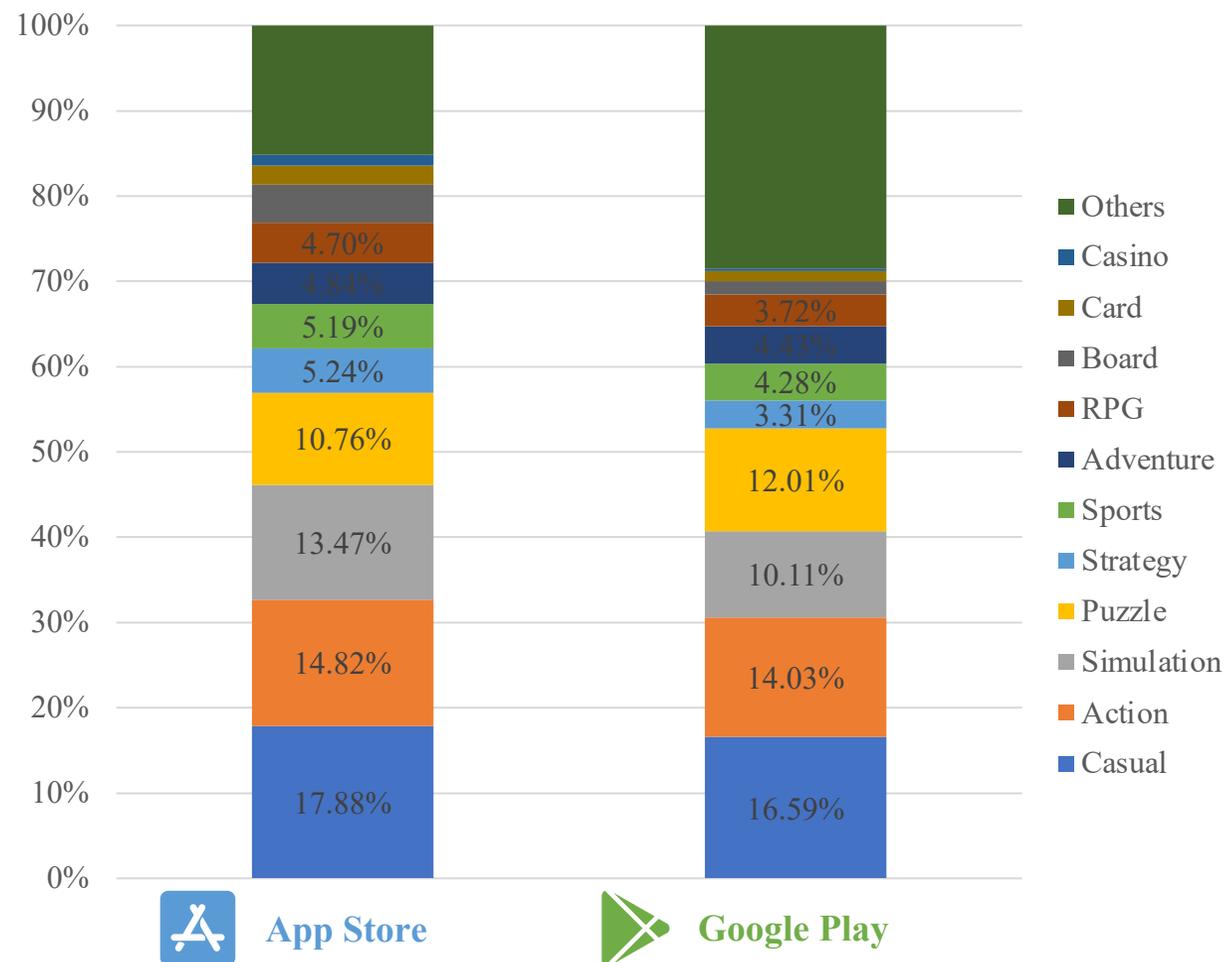
Top 3 by Revenue on the App Store



Top 3 by Revenue on Google Play



Downloads of Israeli Mobile Games by Genre



On the App Store, **casual**, **action** and **simulation** games were the most downloaded. On Google Play, the top 3 most-downloaded game genres were **casual**, **action** and **puzzle** games.

In terms of top game genres, hyper-casual games were the most among top 10 most-downloaded games on Google Play. **[Fill The Fridge!]** was the top 1 most-downloaded game in Israel.

Top 3 by Revenue on the App Store



Top 3 by Revenue on Google Play



2022 Top 20 Israeli Mobile Games by Advertising



1		Fishdom Playrix	Puzzle
2		Two Dots Playdots	Casual
3		Rise of Kingdoms Lilith Games	Strategy
4		State of Survival FunPlus	Strategy
5		Idle Heroes DH Games	RPG
6		Klondike Adventures VIZOR	Simulation
7		Mafia City Yotta Games	Strategy
8		Braindom Matchingham Games	Puzzle
9		Merge Mansion Metacore Games	Simulation
10		Club Vegas Slots Bagelcode	Casino
11		Left to Survive MY COM	Action
12		Braindom 2 Matchingham Games	Puzzle
13		Tennis Clash Wildlife Studios	Sports
14		Matchington Mansion Magic Tavern	Casual
15		Girls X Battle 2 Yotta Games	RPG
16		Chief Almighty Yotta Games	Strategy
17		The Grand Mafia Yotta Games	Strategy
18		Apex Legends Mobile Electronic Arts	Action
19		Homescapes Playrix	Puzzle
20		FIFA Football Electronic Arts	Sports

1		Braindom 2 Matchingham Games	Puzzle
2		Fishdom Playrix	Puzzle
3		Braindom Matchingham Games	Puzzle
4		Zooba Wildlife Studios	Action
5		Mafia City Yotta Games	Strategy
6		War Robots PIXONIC	Action
7		Rise of Kingdoms Lilith Games	Strategy
8		Homescapes Playrix	Puzzle
9		Gardenscapes Playrix	Puzzle
10		Sniper 3D Wildlife Studios	Action
11		Sky Warriors Wildlife Studios	Simulation
12		Township Playrix	Simulation
13		Age of Magic Playkot	RPG
14		Kingdom Guard Tap4Fun	Strategy
15		Demon God JunHai Games	RPG
16		Tennis Clash Wildlife Studios	Sports
17		Lords Mobile IGG	Strategy
18		The Grand Mafia Yotta Games	Strategy
19		Be The Judge Matchingham Games	Casual
20		Wood Block Puzzle Learnings	Puzzle



Analysis of The Israeli Large Mobile Game Companies

Top Israeli Mobile Game Companies

Israeli Game Companies: Dark Horses in the Global Gaming Industry

In the global video game market, Israeli game company is a relatively new player who, however, has made quite a big progress in a very short time. Israeli game companies were obscure in the early 21st century, and now they are top ones that play an important role in the global gaming industry.



Playtika
 Founded in 2010;
 Focuses on social and casino games



Plarium
 Founded in 2009;
 Focuses on RPGs and strategy games



Moon Active
 Founded in 2012;
 Focuses on social and simulation games



Crazy Labs
 Founded in 2010;
 Mainly develops and publishes hyper-casual games



Ilyon Dynamics
 Founded in 2014;
 Focuses on arcade and casual games



Beach Bum
 Founded in 2015;
 Focuses on board and casino games



Huuuge
 Founded in 2015 and started business in Israel in 2018, focuses on casual and casino games



888
 Founded in 2015; started business in Israel in 2018; focuses on casual and casino games



SciPlay
 Founded in 1997; started business in Israel in 2014; focuses on casino and hyper-casual games



Playstudios
 Founded in 2011; started business in Israel in 2016; focuses on casino and puzzle games

Large Israeli Game Companies

Plarium Global



PLARIUM



The Israeli game developer Plarium Global, one of the most successful video game studios, has entertained 380 million gamers around the world and totally released over 20 games, ranging from RPGs such as [Vikings: War of Clans] and [Stormfall] to casual games such as [Lost Island: Blast Adventure].

Hard Core Games



RAID: Shadow Legends

Card RPG



Soldiers Inc: Mobile Warfare

4X military strategy/SLG



Vikings: War of Clans

4X military strategy/SLG



Mech Arena

Multiplayer mech shooter

Light/mid core games



Family Zoo: The Story

Match-3 + X



Lost Island: Blast Adventure

Match-3 + X



Word Rangers: Crossword Quest

Puzzle: Word

Plarium Global's Representative Game



RAID: Shadow Legends

[RAID: Shadow Legends] is a fantasy adventure RPG based on the western myth where players join battles with over a hundred warriors from 16 factions. The game was released in 2019 and then quickly gained popularity in the European and American RPG markets to **remain the second best-selling RPG there.**

The game has accumulated over 50 million downloads and generated about \$700 million in revenue. The US market is very important to the game, contributing about 70% of its revenue and 40% of its downloads. And lots of the game's players are from Russia, the UK and Germany.

Aug. 2018

First Release Date

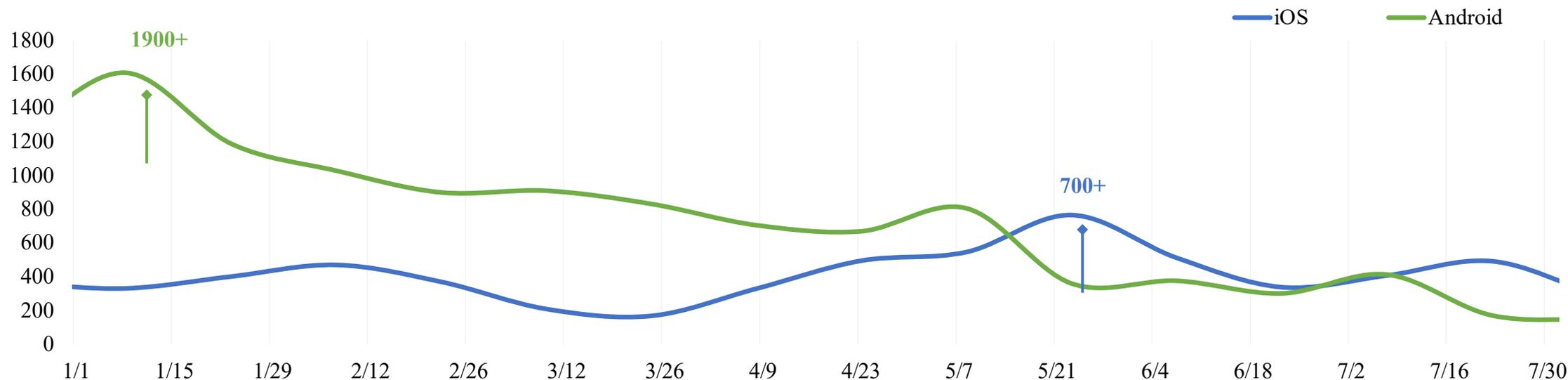
Feb. 2019

Game's Release Date

49.9K

Deduplicated Creatives

Global Advertising Analysis of [RAID]

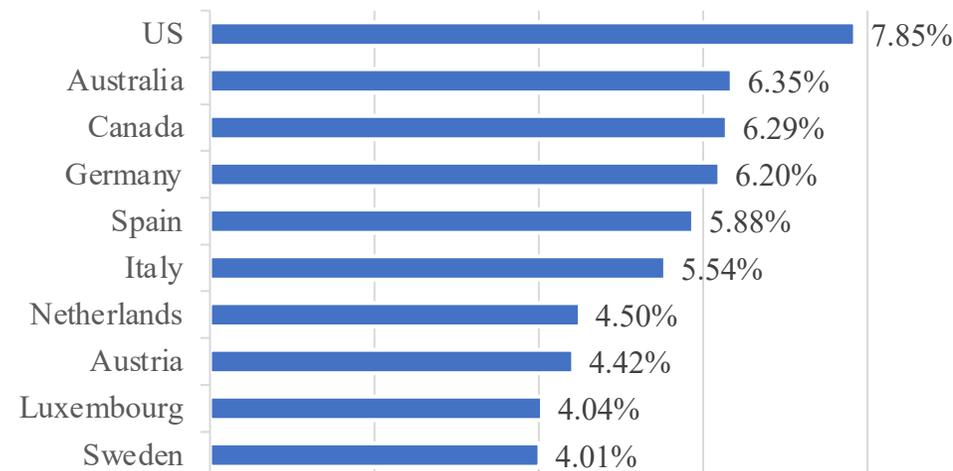


Most of its ad creatives were released in North America and Europe, with a peak of nearly 2,000 creatives per day

The game released an average of 1,100 creatives per day in 2022, and its creatives on Android were 1.6 times that on iOS.

The number of creatives on Android was higher but was also evident on the decline, and it was surpassed by the number of creatives on iOS in May this year.

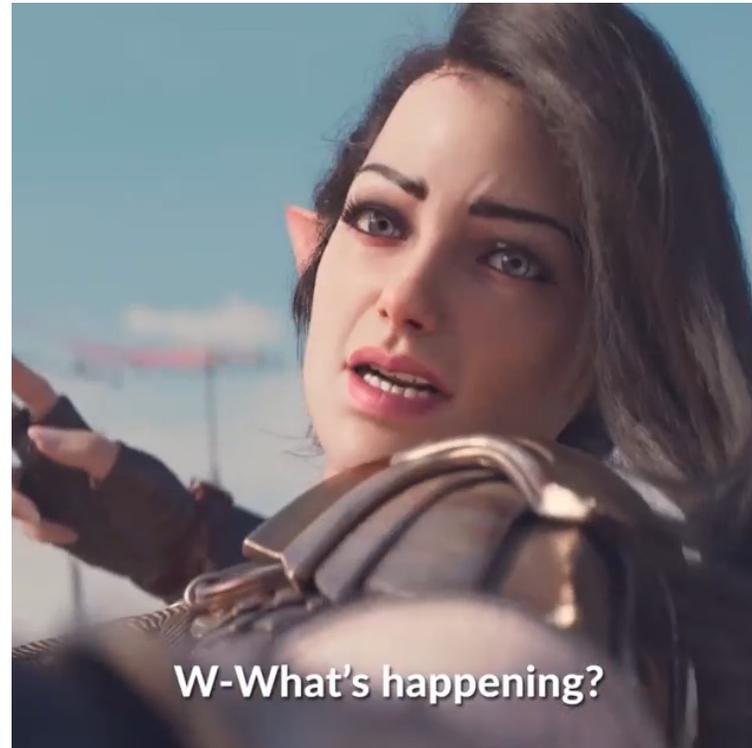
Ad creatives for the game were mostly released in North America and Europe, with creatives in America accounting for 7.85%, the highest of all.



[RAID]'s Recently Popular Creative

Popularity: 351

Estimated Impressions:
515.3K



Duration: 71 days

Dimensions: 640 * 640

Advertising Platform:  facebook.



Advertising Copy:

Team up and fight to Win!

Collect magic heroes, fight epic bosses, dominate on PvP Arena!

PLAY NOW!

[Click to play](#)



High-quality CG

[RAID]'s creatives are of quality that is way above the industrial standard. When most creatives for RPGs were released in the format of UE, [RAID] had most of its creatives with vivid facial expressions. And Plarium's video producing department is very good at combining games and real life, creating high-quality CG to raise the expectation of gamers.

Israeli Popular Game Companies

Moon Active

MOON ACTIVE



As one of the fastest developing game companies in the world, Moon Active had received totally over 100 million downloads of its mobile games in over 136 countries across the world. The revenue of Moon Active was not announced but was believed to be over \$1.65 billion in 2021 .

In 2020, Moon Active bought the game company Melsoft for several hundred million US dollars. In 2021, Moon Active received an investment of \$300 million led by its existing shareholder Insight Partners. The company is now valued at over \$5 billion. The most famous game of the company is [Coin Master], which was outstanding in many markets around the world.

Social gambling games



Coin Master



Pet Master

Simulation games



Family Island



My Cafe

Moon Active's Representative Game



Coin Master

[Coin Master] was released as early as 2010 and has been played for over 11 years. The game raked in a revenue of totally \$1.3 billion in 2021 to become one of the 8 games grossing over \$1 billion in the world. The game generated **most of its revenue from the US** which contributed more than half (52.61%) of the game's total revenue.

However, things didn't always go well for the game. Before December 2018, the game grossed less than \$10 million every month. And Moon Active made lots of changes to the game in 2019 and **added the modes of PVP and city construction**. Thanks to those elements added, the game's revenue began to soar.

Apr. 2016

First Release Date

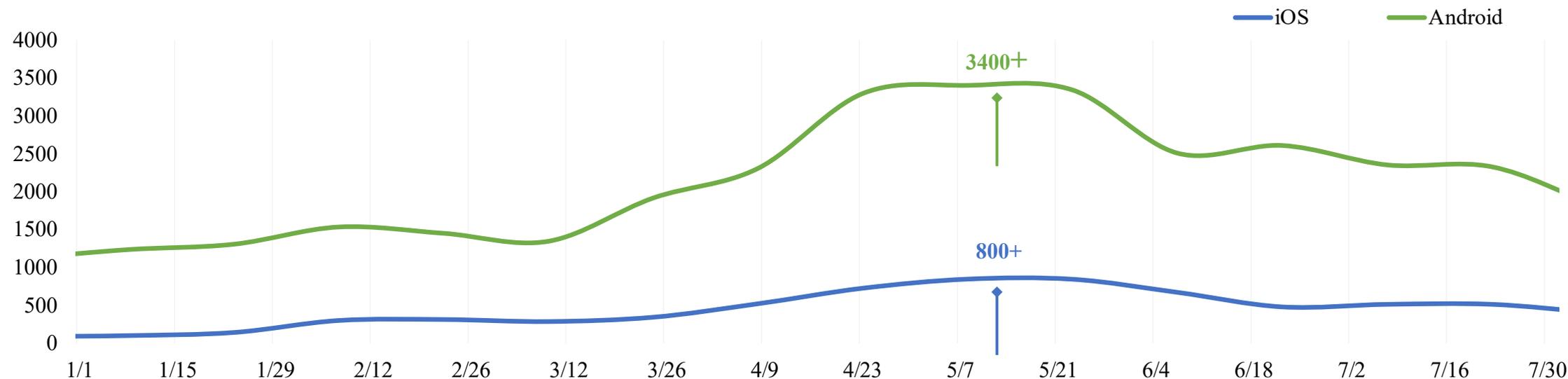
Dec. 2010

Game's Release Date

50.5K

Deduplicated Creatives

Global Advertising Analysis of [Coin Master]

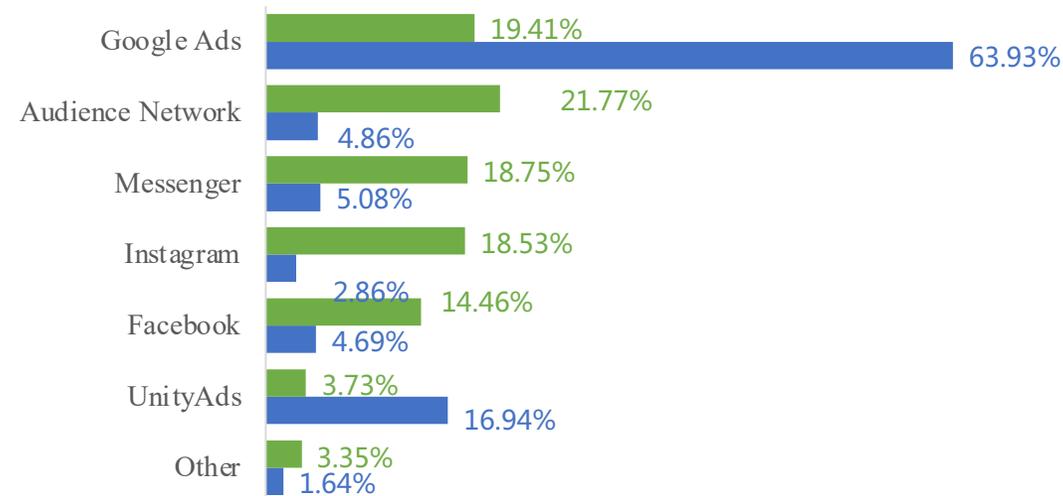


Early May saw a peak of creatives, with most of its creatives on Google Ads

In 2022, the game had averagely 2,500 creatives a day, with obviously more creatives released on Android than on iOS;

The game released relatively more creatives in mid-April and May, recording a peak of creatives in May with as many as over 4,200 creatives in a day;

Over 60% of the game's creatives were released on Google Ads for iOS, and nearly 20% of its creatives were on Google Ads for Android.



[Coin Master]'s Recently Popular Creative

KOGO MY TU MAMY...



MUSISZ JĄ WYPRÓBOWAĆ

Duration: 75 days

Dimensions: 720 * 900

Advertising Platform: 



Advertising Copy:

⚠️ Uwaga: gra Coin Master uzależnia

Najeżdżaj i atakuj swoich znajomych z serwisów społecznościowych i graj z nimi. Dołącz do przygody! (Polish)

[Click to play](#)



Celebrity endorsements are marketing secret

David Schwimmer, famous for portraying Ross Geller in the sitcom Friends.

The impact of gaming influencer marketing goes far beyond the clicks and downloads attributed to tracking links.

Popularity: 546

Estimated Impressions:
615.2K



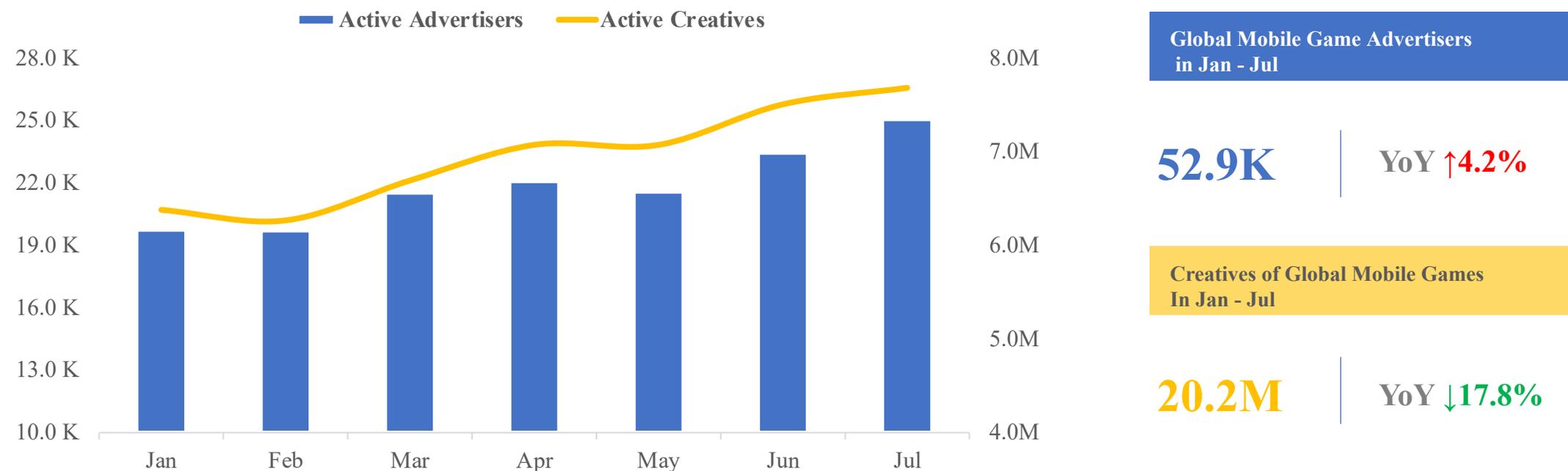
Insights into Global Mobile Game Marketing

Analysis of Global Mobile Game Marketing

Mobile game advertising was gradually recovering to **reach a peak in July**

This year saw a total of 20.2 million mobile game creatives released, **a significant decline compared to the same period last year**, down 17.8% YoY. There were 52,900 active advertisers, up 4.2% YoY.

Despite a significant decline in creatives, there was a rising number of advertisers. And monthly creatives had been increasing from January to July this year, which means **advertising competition will be more intense in the second half of the year.**



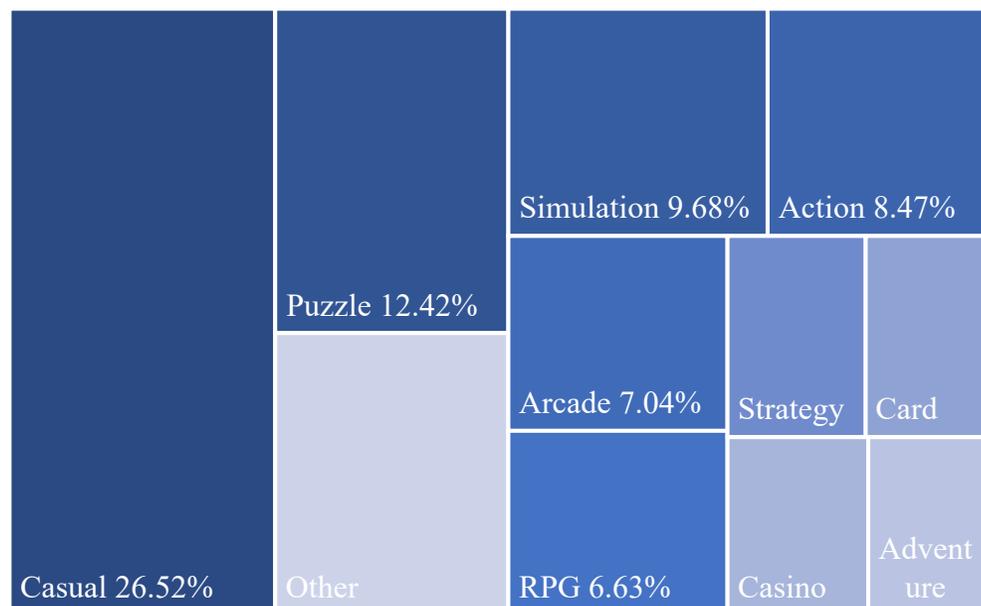
Analysis of Global Mobile Game Advertising

Casual and puzzle games contributed the most advertisers, while RPGs released the second most creatives.

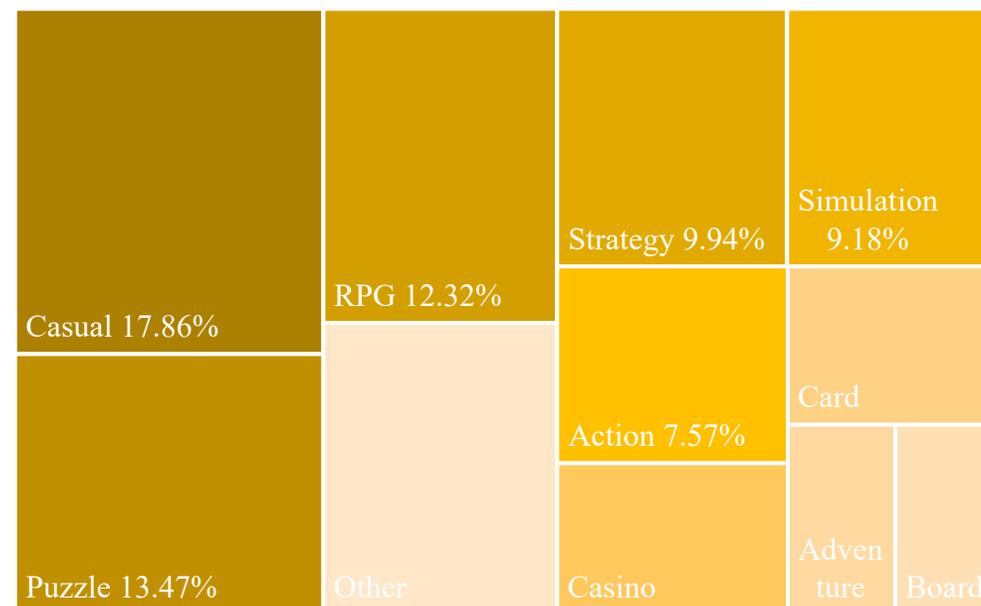
Casual and puzzle games contributed the most advertisers and creatives, together accounting for about 1/3 of the advertising of global mobile games. Casual game advertisers increased by 4.36% compared to the same period last year, thanks to the increase of hyper-casual game advertisers.

RPGs reported a dramatic decline in advertising, with advertisers dropping by 2.47% YoY and creatives dropping by 1.5% YoY, the biggest decline of all game genres.

■ Active Advertisers



■ Active Creatives



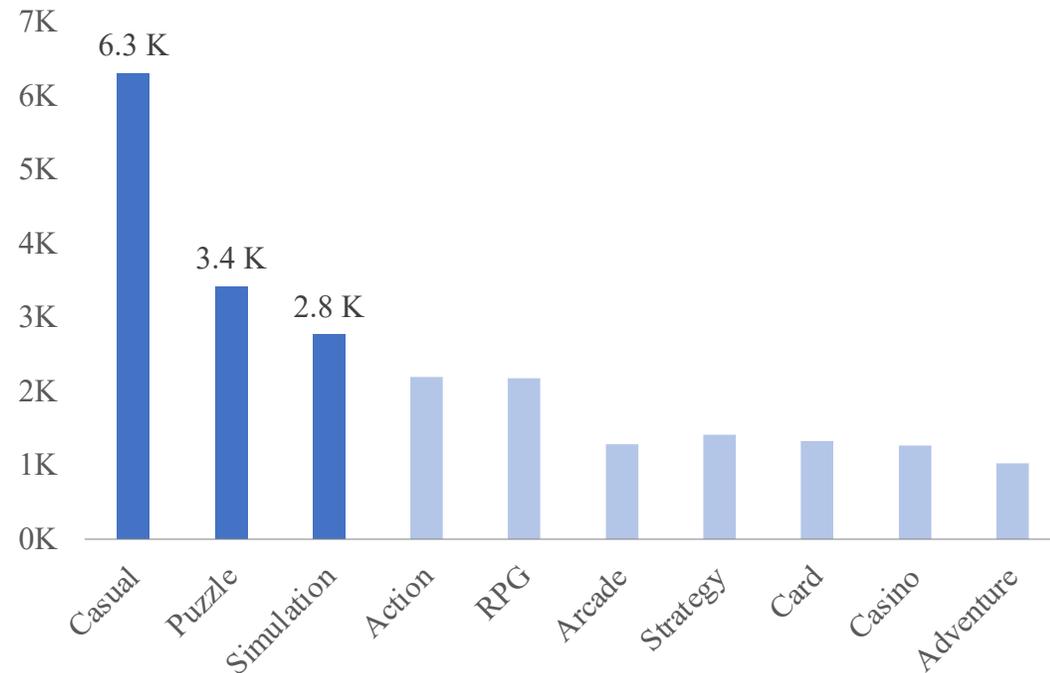
Global Game Advertising Analysis by Game Genre

In 2022, mobile game **advertisers per month: 21.9K**; **monthly creatives per advertiser: 318**

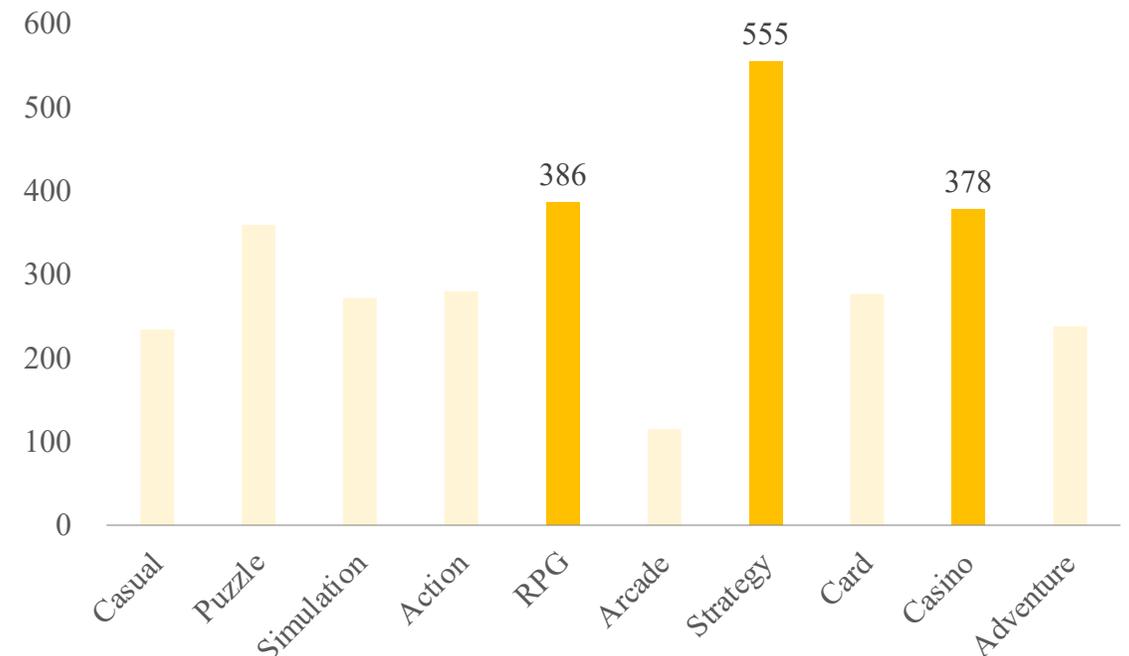
Among all mobile games, **casual games** had the most monthly advertisers. According to SocialPeta, there were over 6300 casual game advertisers per month, followed by puzzle game and simulation game advertisers.

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

Monthly Advertisers



Monthly Creatives



Global Game Advertising Analysis by Regions

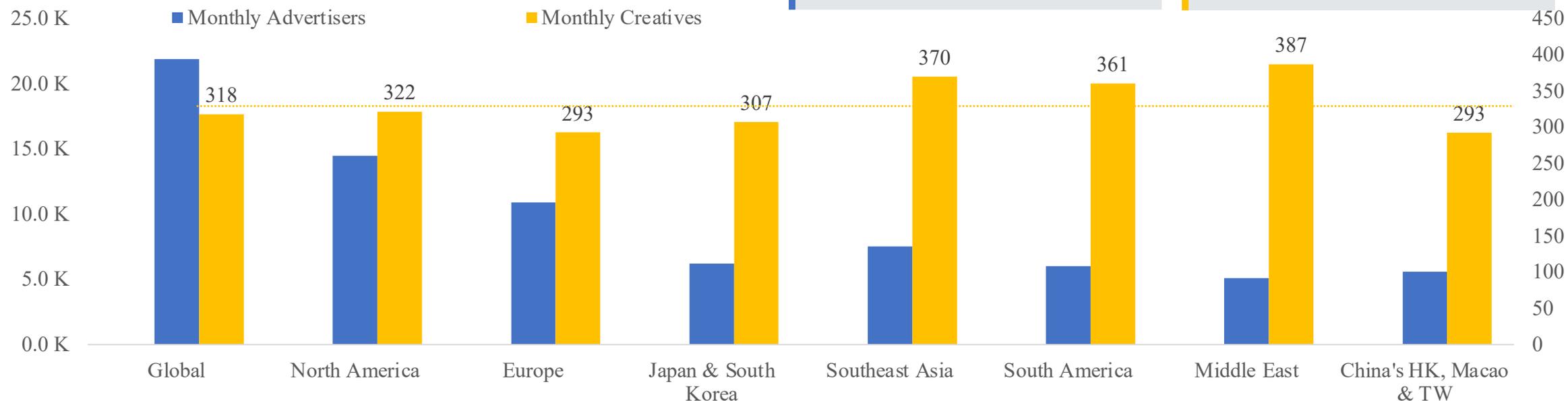
North America still had the most mobile game advertisers
Monthly creatives' quantity in Middle East, Southeast Asia, South America were more than the global average creatives

Mobile game advertisers in North America: 14.5K

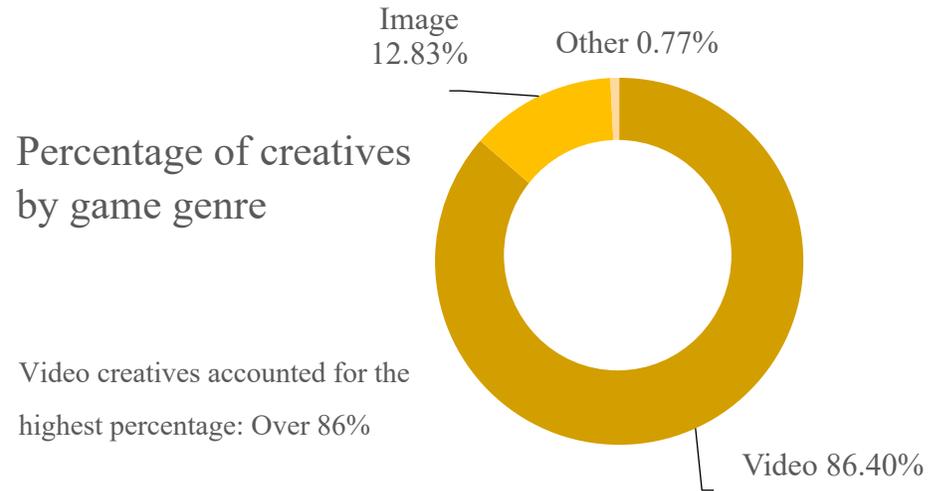
North America had the most average monthly advertisers, which were nearly 15K. Europe recorded the most significant decline in average monthly advertisers, down 14.5% YoY.

Average creatives in Middle East: 387

Middle East had the highest number of monthly creatives per advertiser, which were 387. Southeast Asia and South America had the most average creatives.



Percentage of Creatives by Game Genre

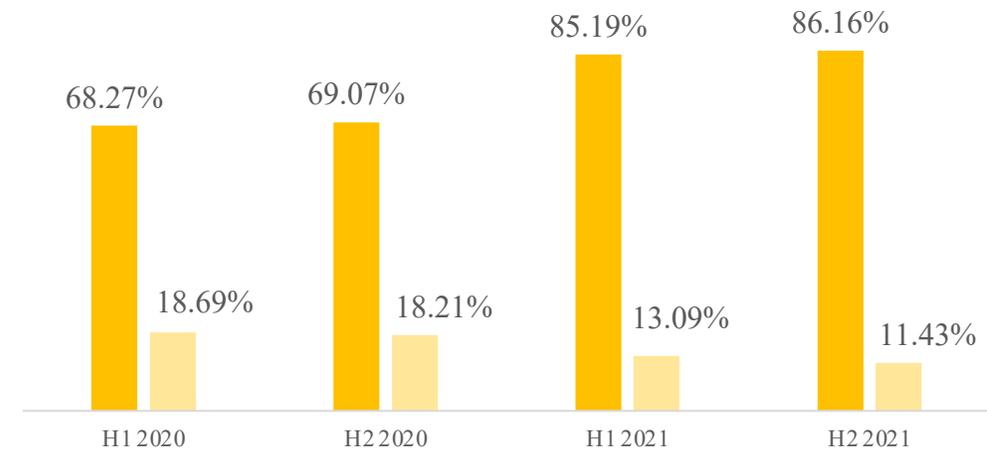


17,486K
Total video creatives

Video has always been the main format of mobile game creatives. With the upgrading of global mobile devices and mobile networks, advertisers tend to choose video creatives as their major advertising format because videos can convey much more information.

Changing trends of video and image creatives over the years

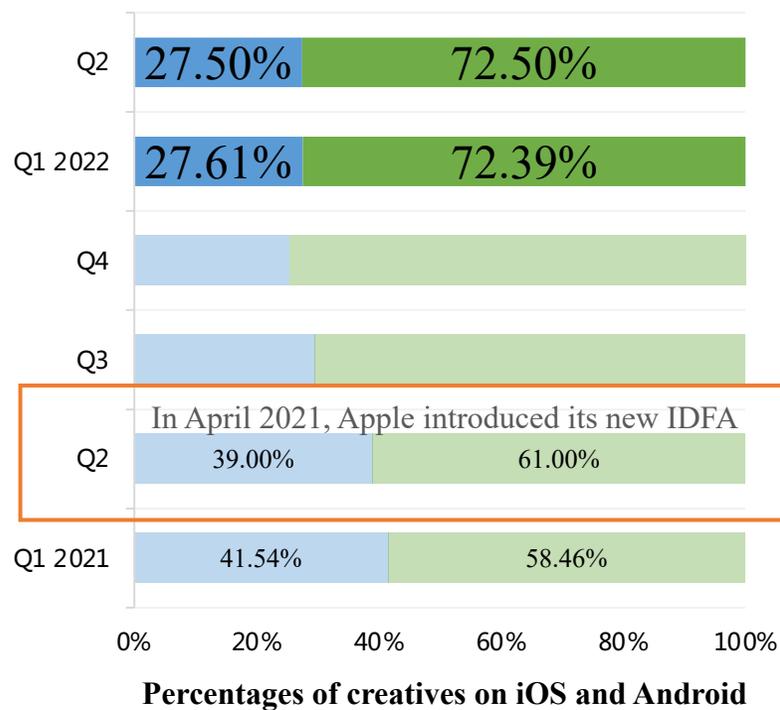
- The percentage of video creatives continued to rise
- The percentage of image creatives dropped from 18% to about 12%



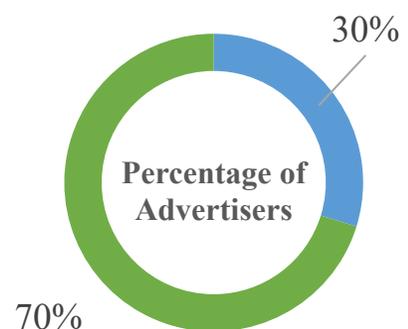
Insights into Mobile Games Advertising on iOS & Android

Mobile game advertisers and creatives on **Android** accounted for **70%** of the total 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 6.1% more than that on iOS.



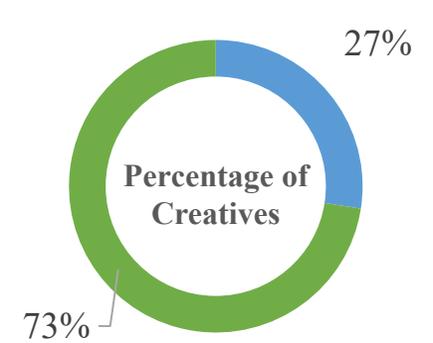
In April 2021, Apple introduced its new IDFA




Android

333

Average quantity of creatives per month in 2022




iOS

314

Average quantity of creatives per month in 2022

Top 20 Global Mobile Games by Advertising in 2022



1	Fishdom Playrix	Puzzle	11	Resortopia DH Games	Simulation
2	Word Trip PlaySimple Games	Word	12	Mafia City Yotta Games	Strategy
3	The Ants StarUnion	Strategy	13	Two Dots Playdots	Casual
4	Coloring Book! Doodle Mobile	Board	14	Purrfect Tale DH Games	Simulation
5	Rise of Kingdoms Lilith Games	Strategy	15	Wordle! Lion Studios	Word
6	Evertale ZigZaGame	RPG	16	Kingdom Guard Tap4Fun	Strategy
7	The Grand Mafia Yotta Games	Strategy	17	Last Fortress IM30	Strategy
8	Block Puzzle Doodle Mobile	Puzzle	18	聖樹喚歌 新连信息	RPG
9	歡樂大東家 EWORLD	Simulation	19	Dynasty Legends 2 Taihe Interactive	RPG
10	State of Survival FunPlus	Strategy	20	Animal Restaurant DH Games	Simulation

1	Scatter Slots Murka	Casino	11	Lotsa Slots Bole Games	Casino
2	Pharaoh's Slinger Dheeraj maurya	Casino	12	Rise of Empires IM30	Strategy
3	Jackpot World™ Bole Games	Casino	13	Coin Pet ASIA YUTAI NETWORK LIMITED	Casino
4	The Grand Mafia Yotta Games	Strategy	14	Evony Top Games	Strategy
5	Treasure Anubis App Keep Studio	Casino	15	Rise of Kingdoms Lilith Games	Strategy
6	Mafia City Yotta Games	Strategy	16	Sunlights Kiwi Technologies	Casino
7	Lords Mobile IGG	Strategy	17	Cash Frenzy™ Bole Games	Casino
8	Kingdom Guard Tap4Fun	Strategy	18	The Ants StarUnion	Strategy
9	Tiles Hop Amanotes	Casual	19	Fishdom Playrix	Puzzle
10	Wolf Adventure Tatinc5	Casino	20	Garena Free Fire Garena	Action

A large, stylized number '4' is positioned on the left side of the slide. It consists of a white outline of the number and a solid blue shadow of the number, both set against a background of diagonal white stripes.

Top Performing Ad Creatives Analysis

Popular Creatives for American Games

Live-action creatives are very popular in America. There's a big difference between creatives in China and in America.

Live-action creatives are a popular choice because they are very convincing. There are mainly two types of live-action creatives: gaming strategy recommendation and live-action scenarios. Both Chinese and American game publishers value live-action creatives, but there are some obvious differences: American game publishers prefer KOL creatives while global publishers in China prefer live-action scenario creatives.



RAID: Shadow Legends

Hard-core card RPG



Evony

Hot-selling SLG



[Click to play](#)



[Click to play](#)

Popular Creatives for Japanese Games

The creatives value the expression of graphics, focus on displaying character voice, modeling, character settings.

Gacha mechanic has become the main source of revenue for Japanese games. Whether it's a bishōjo game or an otome game, the advertising creatives would highlight the characters' concept art, voice, and settings. For different gameplays, character skills or background stories would be displayed, so users would remember and like the characters more.



ウマ娘 プリティーダービー

Bishōjo and idol-making



[Click to play](#)



あんさんぶるスターズ!! Music

Otome, music, and idol-making



[Click to play](#)

Popular Creatives for South Korean Games

The creatives highlight the game tech through the details of game scenes and characters

MMO mobile games have become the most unique game genre in South Korea, with their distinctively realistic graphics and vast backgrounds demonstrating the features of open-world and next-generation games in South Korea. Creatives for those games are usually long-form videos of game scenes switching, showing the advanced game technologies.



오딘: 발할라 라이징



[Click to play](#)



Lineage W



[Click to play](#)

Trends of Hyper-Casual Game Creatives in H1 2022

Gameplays remain the core of creatives, and creatives ending with a failure are no longer trending.

Creatives for hyper-casual games are mainly about gameplays, trying to attract more gamers by showing how entertaining the gameplays are. Many creatives used to lure gamers into playing the games by displaying stupid game controls. Now users are very familiar with the advertising pattern, so most creatives for hyper-casual games end with a success to highlight how original and entertaining the games are.



Mr Bullet
Lion Studios



[Click to play](#)



Sculpt people
Crazy Labs



[Click to play](#)



Merge Grabber
Voodoo



[Click to play](#)

Trends of Strategy Mobile Game Creatives in H1 2022

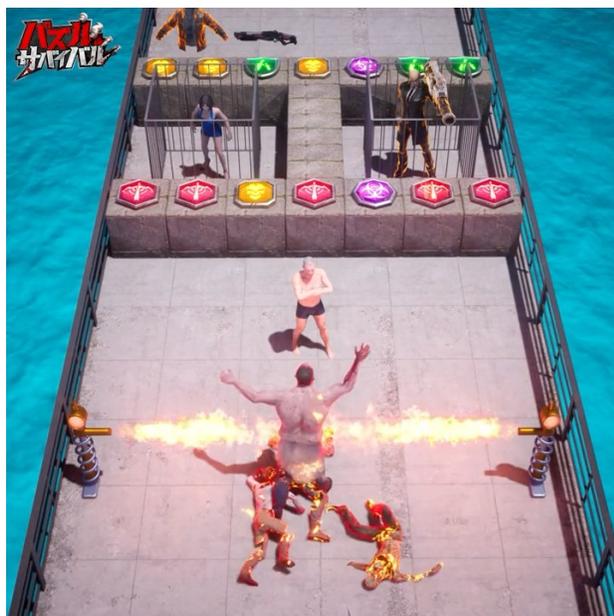
Strategy mobile game creatives are designed with a **lightweight gameplay**

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](#)

Trends of RPG Mobile Game 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](#)



Thần Vương Chi Mộng



[Click to play](#)



Episode



[Click to play](#)

Trends of Simulation Mobile Game Creatives in H1 2022

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](#)

An abstract graphic on the left side of the slide. It consists of a white outline of a stylized 'S' shape, a semi-transparent blue 'S' shape behind it, and a series of white diagonal lines forming a grid-like pattern. A white rectangular shape is positioned at the top left of the graphic.

SocialPeta & GameIS

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 70 countries/regions and over 70 channels worldwide



Updated hourly
Over 1 million ad data are updated each day

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



GameIS – A non-profit organization that has been promoting the Israeli digital games industry since 2011

The Israeli industry is a relative newcomer to the global video games scene but has reached significant accomplishments within a short period. It has grown from a nascent industry in the early 2000s to one that has produced success stories on a global scale. **In 2021, its revenues were estimated at \$8.6 bn.** Compared to 2016, where industry revenues stood at \$1 bn., there has been an impressive average yearly growth of 54%, with revenues increasing by about 760% over the last five years.

Moreover, the Israeli video games industry in Israel is a flourishing market with great potential. **In 2021, Israel was home to some 190 companies with around 14,000 employees.** Compared to 2017, the industry's employees numbered some 4,000 employees. This marks a 250% increase in human resources and an average annual growth of 38%. In addition, there has been an 11% growth in the number of companies during this time.

Israel's video games industry is facing significant challenges as it struggles to maximize its potential with a lack of funding and a shortage of human resources. As startups thrive in Israel, they are not enough investors to comprehend and evaluate the industry's full potential and not enough educational programs to create the much-needed human resources.

GameIS was established in 2009 to assist the industry with those problems. It continues today to help nourish the Israeli video game ecosystem by addressing those issues and working with all the players in the Israeli sector.