



Q3 2022

Mobile Game Marketing

Insights & Trends of Popular Game Genres



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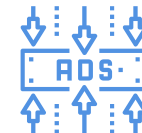
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5.1 million
APP advertisers



1.2 billion
ad creatives



1.2 million
daily updates

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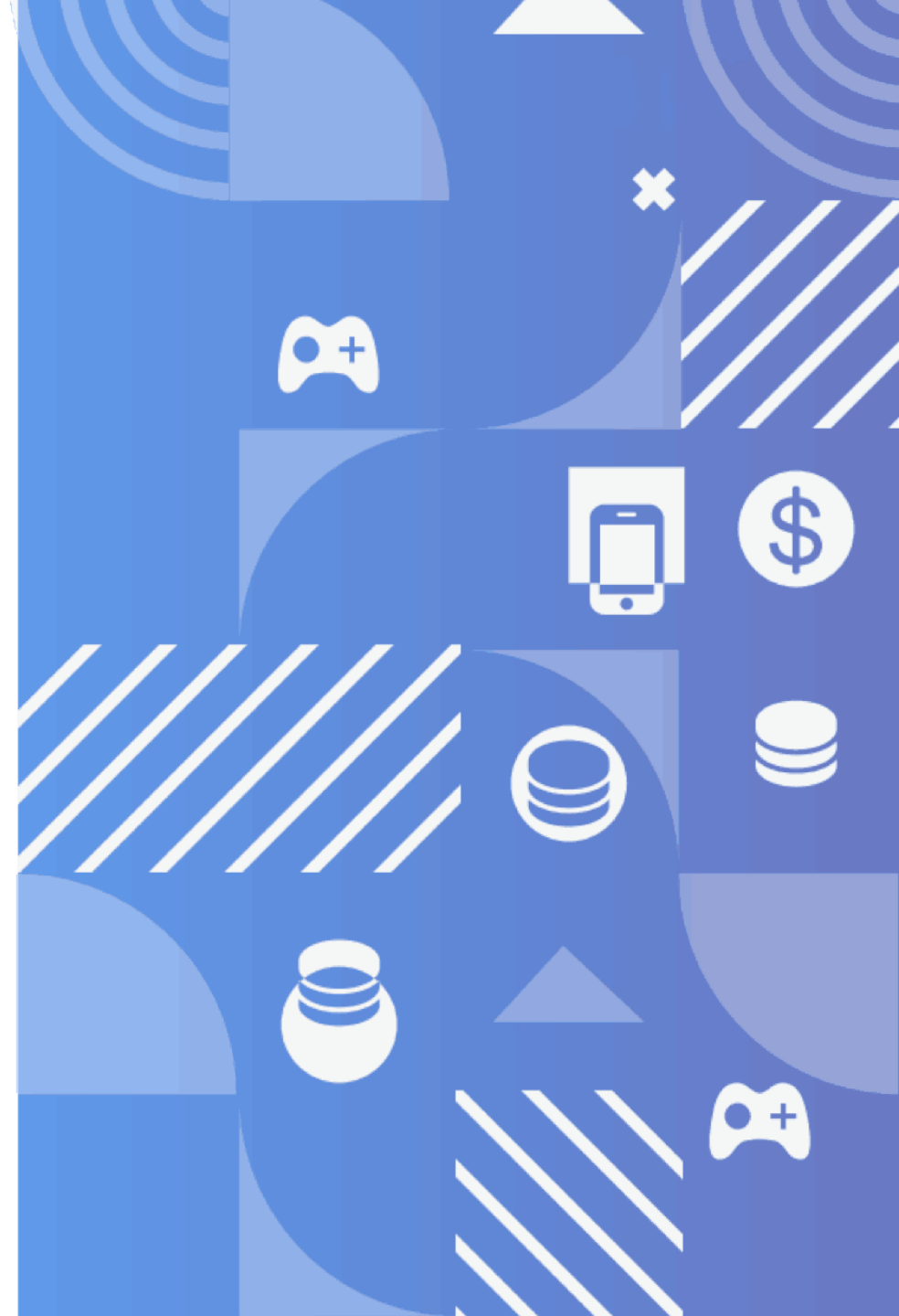
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Insights into Global Mobile Game Marketing

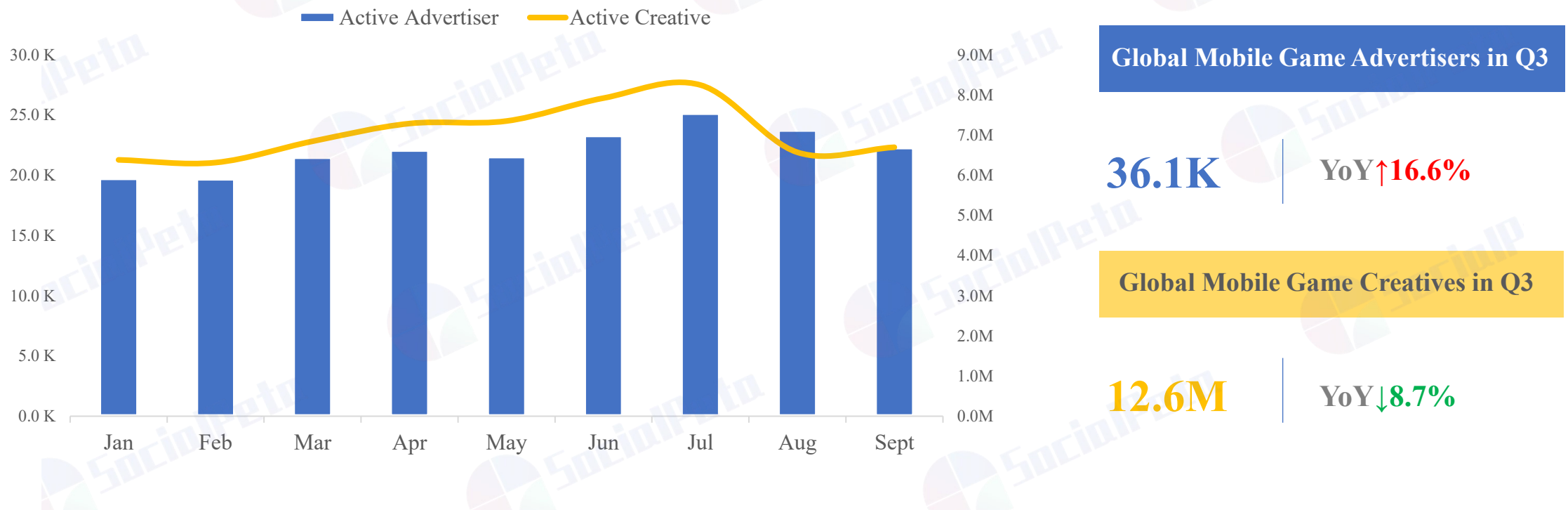
Insights into Global Mobile Game Marketing in 2022



Jan-Jul saw a significant increase in creatives; August saw a dramatic decline in creatives.

Q3 reported a total of **over 36000** mobile game advertisers, **up 16.6% YoY**. The number of monthly active advertisers was on a rising curve to reach over 22000.

Active creatives had surged since January to **reach over 8 million creatives in July only**. But creatives experienced a dramatic decline in August, with a decrease of over 20% from the previous month.



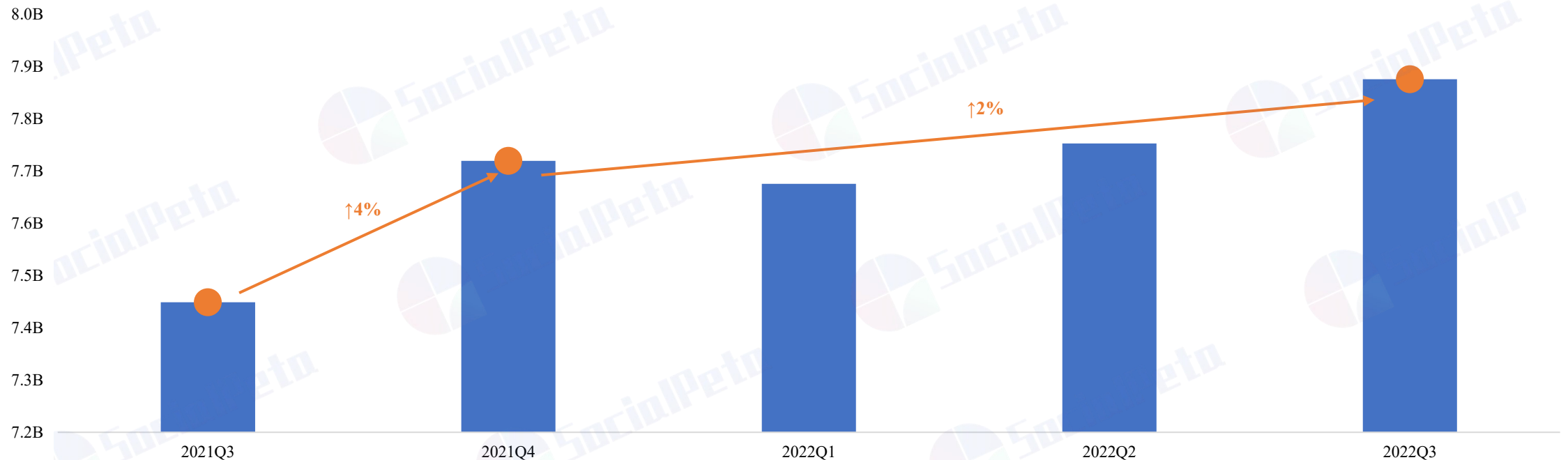
Insights into Global Mobile Game Marketing in 2022

Global mobile games **grew by quarter in Q1-Q3 2022 for a smooth recovery.**

Compared to 2021, the mobile game industry was on a downtrend this year. But based on this year's data, the downloads of global mobile games **were increasing by quarter to achieve a growth.**

Downloads increased by over 100 million in **Q3 2022, with a YoY growth of 6% and a QoQ growth of 2%**, indicating a steady growth of the mobile game markets.

Downloads of global mobile gaming apps in the past year



Insights into Global Mobile Game Marketing in 2022

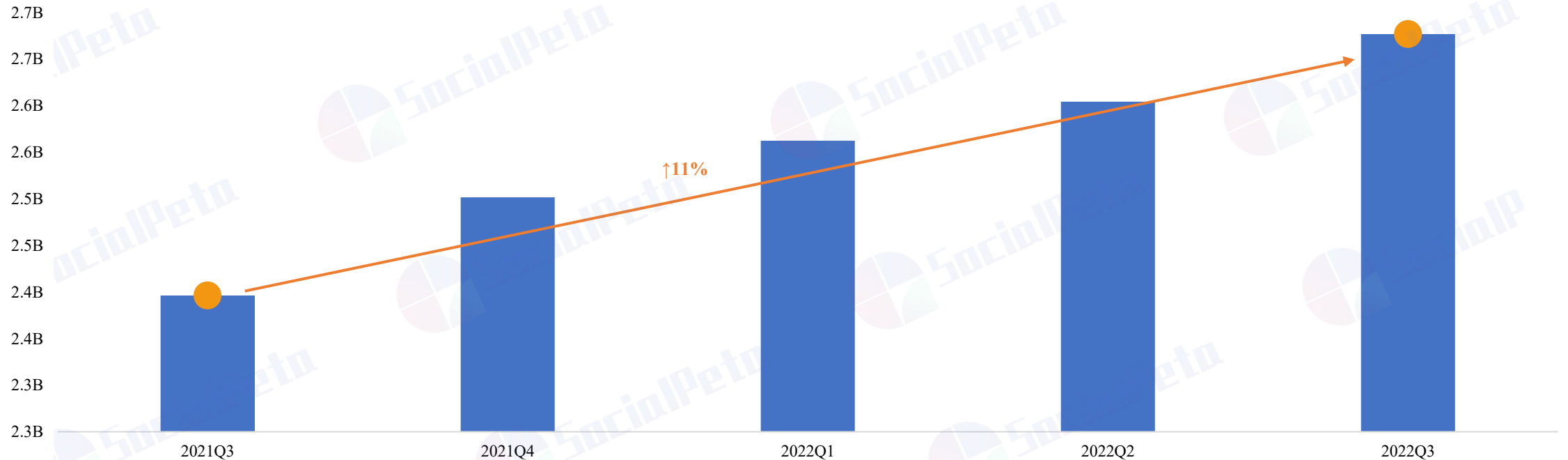


In the past year, **DAU increased by a quarterly growth rate of about 3%.**

Compared to Q3 2021, active users increased by 11% in Q3 this year, **with an increase of nearly 300 million.**

Based on the downloads and number of active users, **we can see that users had lower willingness to download new games and old games had a higher user stickiness.**

DAUs of global mobile gaming apps in the past year



Insights into Global Mobile Game Marketing in 2022

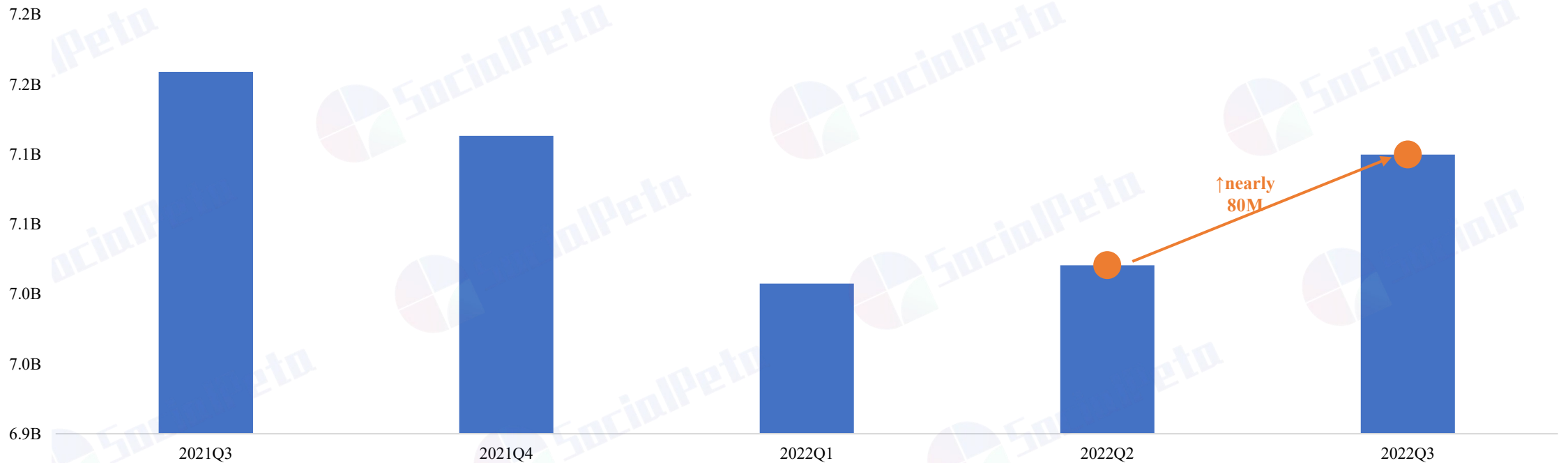


IAP started to recover from Q2, but still less than the same quarter last year.

Mobile game revenue didn't look good in the past year, dropping during Q4 2021 - Q1 2022 and **slowly recovering during Q2-Q3 2022.**

Compared to Q2 2022, **mobile game revenue rose sharply (by over 80 million) in Q3 2022.** It was the highest growth since the revenue decline in the end of 2021. By the end of this year, the mobile game revenue is expected to exceed that in the same period of last year.

IAP of global mobile gaming apps in the past year (Unit: \$)



Insights into Global Mobile Game Advertising in Q3

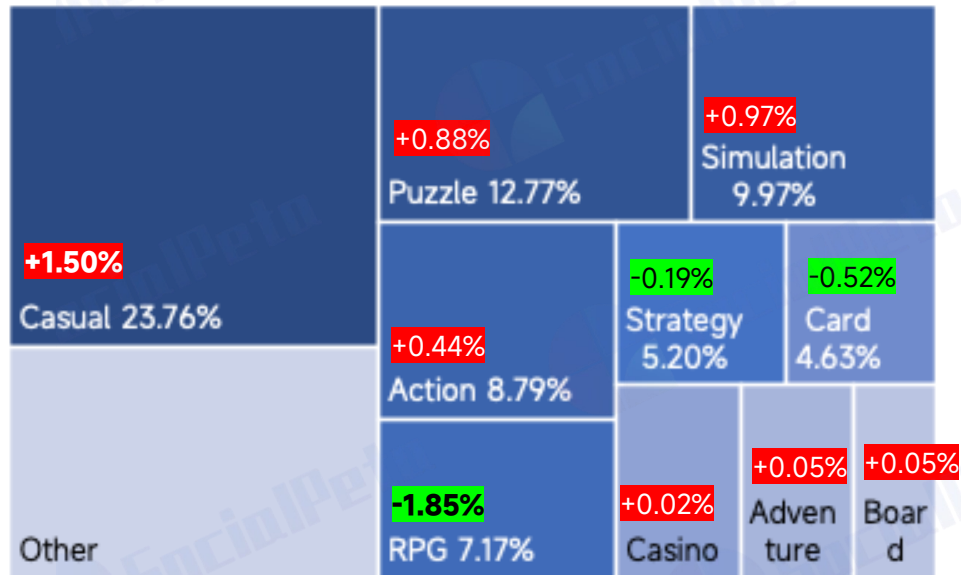


A 1.5% YoY growth in the percentage of **casual game advertisers**, a 1.53% YoY growth in the percentage of **puzzle game creatives**

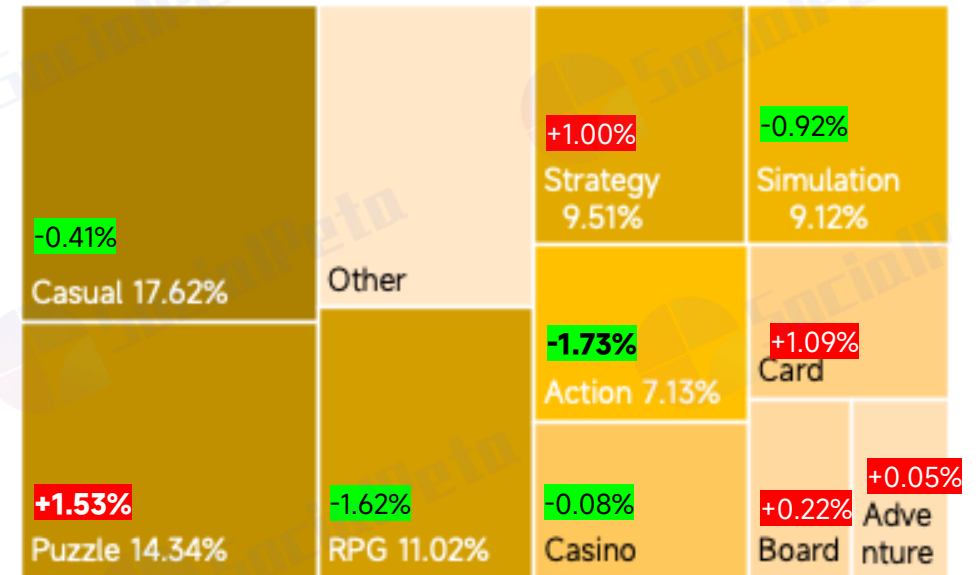
In Q3, casual game advertisers accounted for over 23%, up 1.5% from the same period last year; RPG advertisers accounted for 7.17%, down 1.85% from last year, the largest drop of advertisers among all game genres.

Puzzle game creatives accounted for 14.34%, up 1.53% from last year; action game creatives accounted for 7.13%, down 1.73% from last year, the largest drop of creatives among all game genre.

■ Active Advertisers



■ Active Creatives

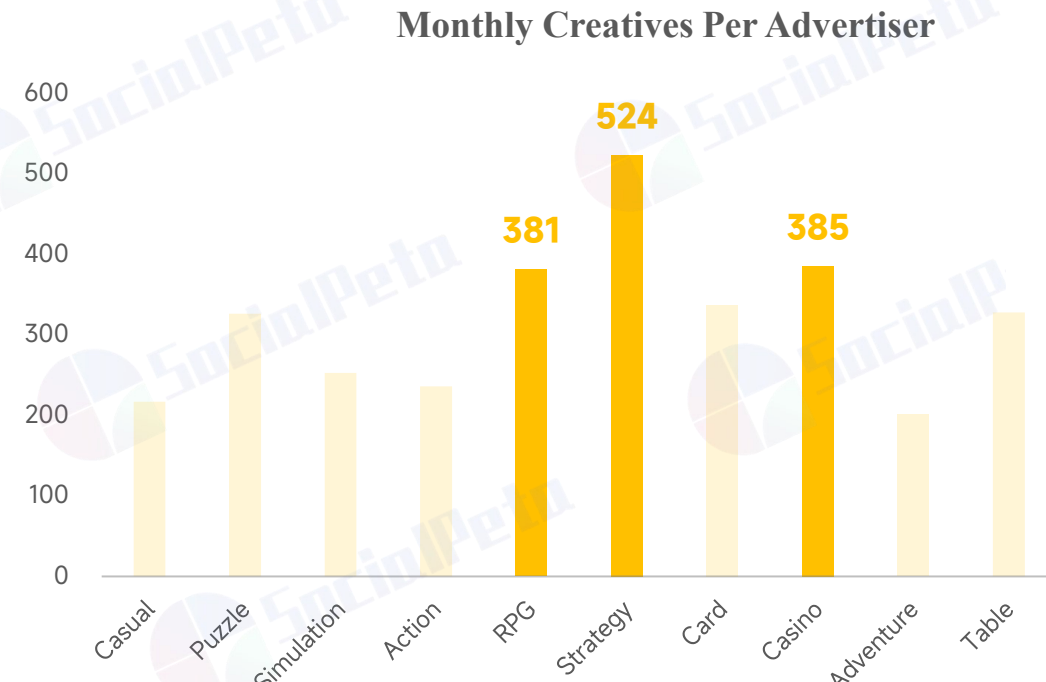


Insights into Global Game Advertising by Game Genre in Q3

In Q3, mobile games had **monthly advertisers: 23.7K**; **monthly creatives per advertiser: 288**

Casual games had the highest number of **over 7200 monthly advertisers** in Q3, nearly 80% higher than puzzle games which had the second most advertisers.

Strategy games were still the top 1 game genre by average advertising, **with 524 monthly creatives per strategy advertiser in Q3**, followed by casino games and RPGs.



Source: SocialPeta, based on data retrieved from backend data sources
Date Range: Jul-Sept 2022 Note: Some advertisers may be classified into multiple game genres, which can cause inconsistency between the percentages of a game genre and the percentages of its total creatives.

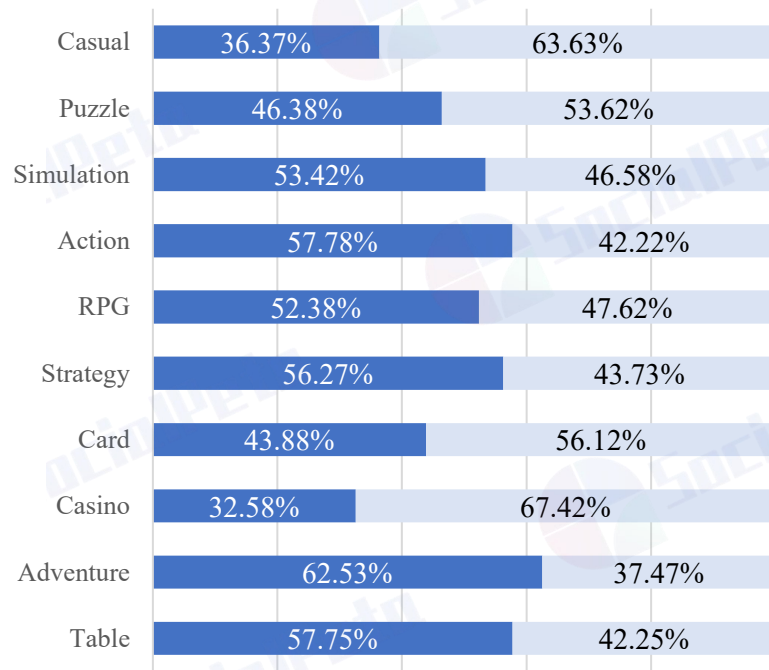
Insights into Advertising by Mobile Game Genre in Q3



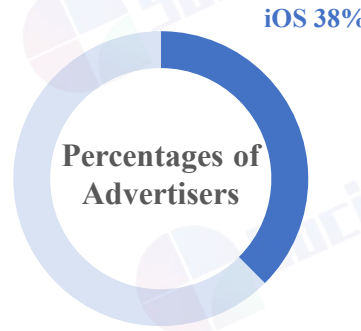
iOS advertisers accounted for nearly 40%, but their creatives accounted for only 30%.

Android advertisers were mostly **casino, casual, and card games**; adventure games accounted for **over 62%, the highest percentage**, of all iOS advertisers.

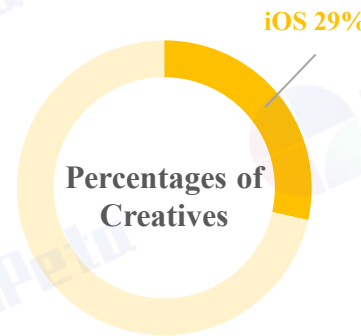
Android obviously had more creatives than iOS. Android and iOS had similar percentages of **simulation, action, and adventure game** creatives.



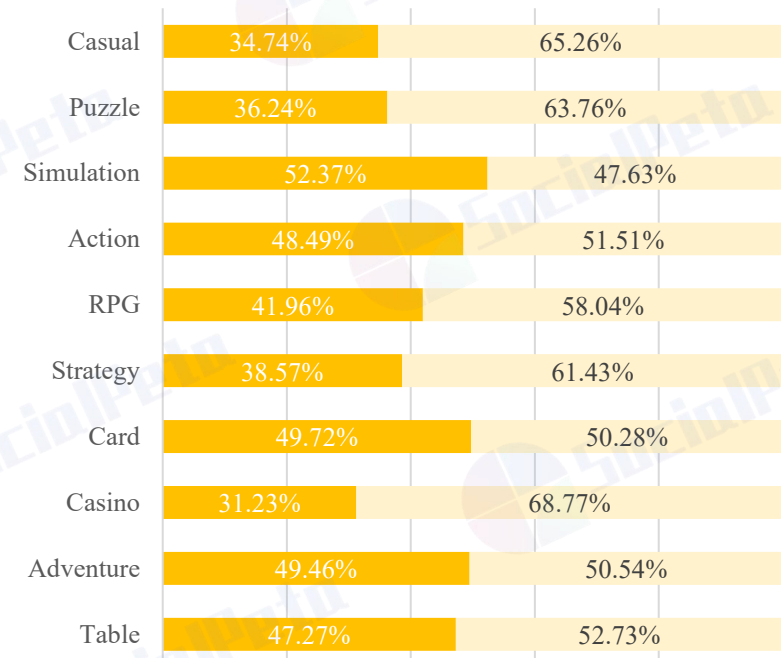
Percentages of mobile game advertisers on iOS and Android



Android 62%



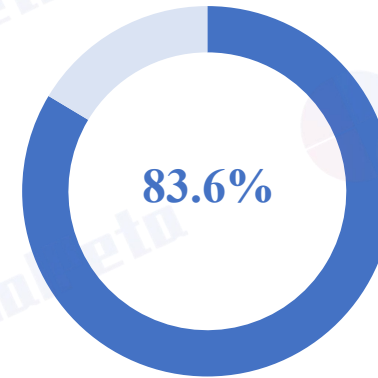
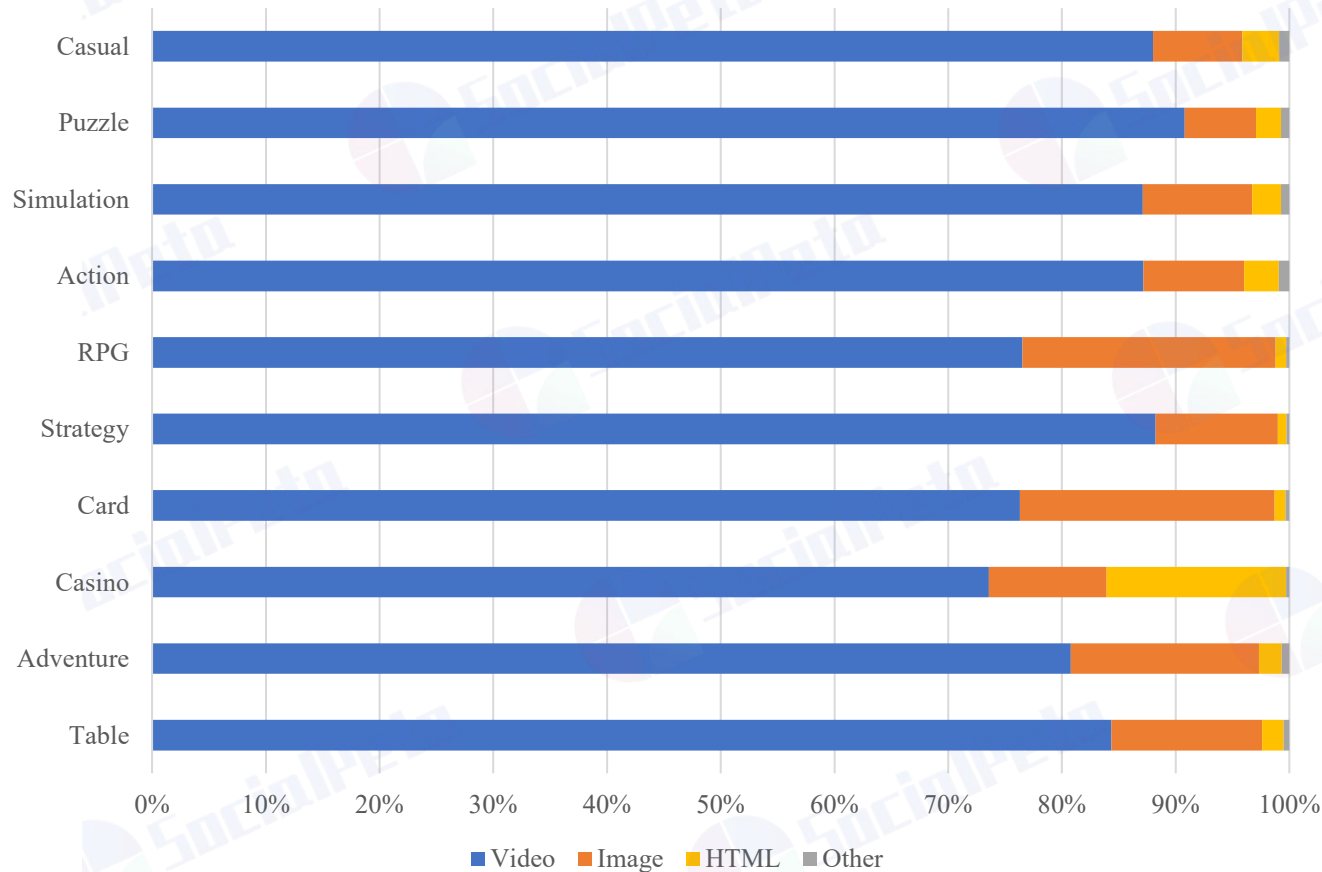
Android 71%



Percentages of mobile game creatives on iOS and Android

Insights into Creatives by Mobile Game Genre in Q3

Video creatives accounted for over 83%, down 1.84% from the same period last year.



Video Creatives

Video creatives were the most mainstream advertising format. Video creatives of puzzle games accounted for the highest percentage (over 90%) of all game creatives, followed by casual games and strategy games.

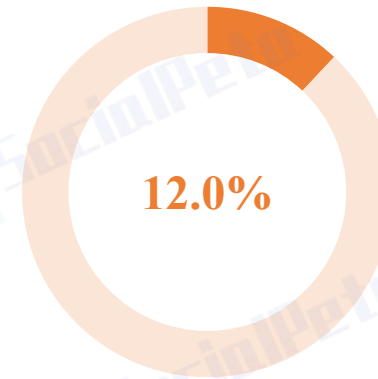


Image Creatives

Image creatives accounted for 12%, up 1% from last year. Percentages of image creatives in RPGs and card games were both over 20%, higher than other game genres.

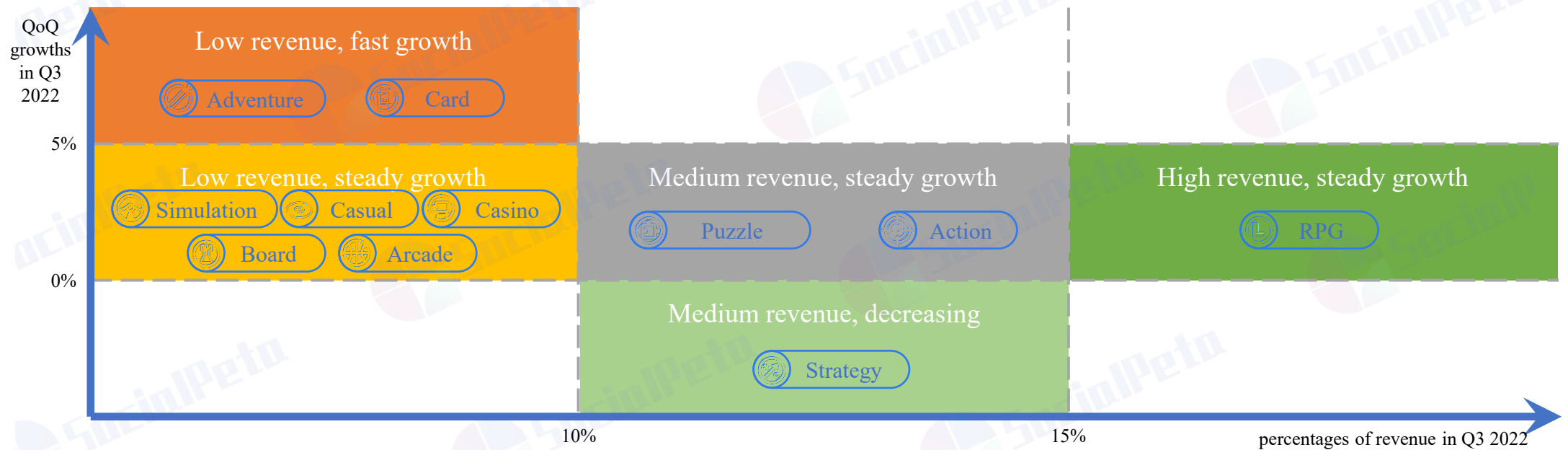
Insights into Global Mobile Game Marketing in Q3

Revenue of most game genres were flattening out.

Of all popular game genres, only **adventure games** and **card games** maintained a **fast revenue growth** of 8% QoQ in Q3 2022. But the two game genres didn't generate very high total revenue and the two genres combined accounted for only 13%.

RPG, simulation, and casual games **tended to have a steady revenue** with a growth of less than 5%.

Popular genres in a nine-square division (Based on percentages of revenue in Q3 2022 and QoQ revenue growths in Q3 2022)



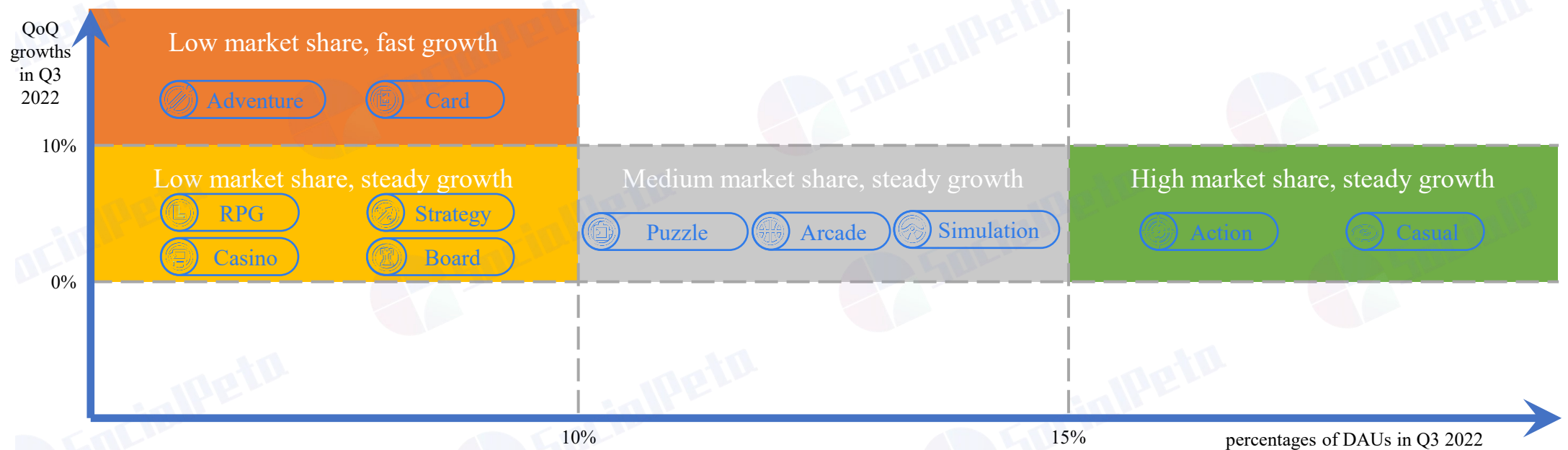
Insights into Global Mobile Game Marketing in Q3

Game genres with low market shares were expected to have a faster user growth

Game genres with high market shares such as action and casual games started to stabilize, while **game genres with low market shares were expected to have a faster user growth and occupy more market share**

But games with low market shares often had relatively small user base and less target audience. Developers need to know how to quickly acquire users from the limited audience.

Popular genres in a nine-square division (Based on percentages of DAUs in Q3 2022 and QoQ DAU growths in Q3 2022)



Insights into Global Mobile Game Marketing in Q3

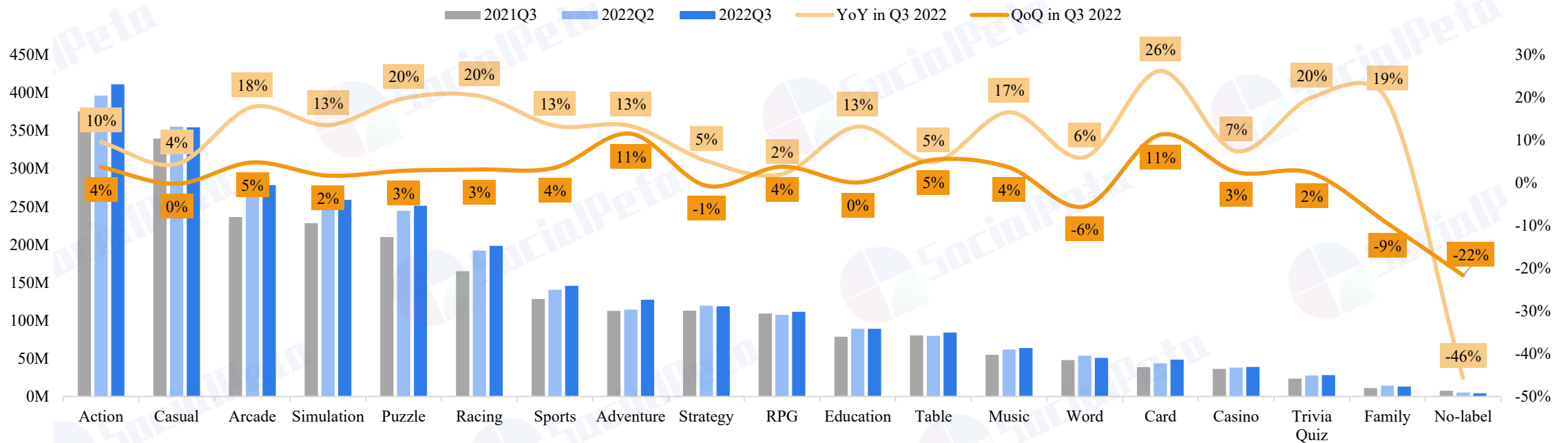


Action and casual old games with “high market share, steady growth” had a good momentum of user growth.

All game genres had a good growth. The top game genres including casual, action, arcade, simulation, and puzzle games had relatively fast DAU growths despite of a large user base. But the growths were mostly contributed by old games that were released at least one year ago.

Among the newly released games in 2022, [Save the Doge], [Fill The Fridge!], and [Apex Legends Mobile] recorded higher growths, and deserved more attention.

DAU trends of mobile games (by game genre)



Insights into Global Mobile Game Marketing in Q3

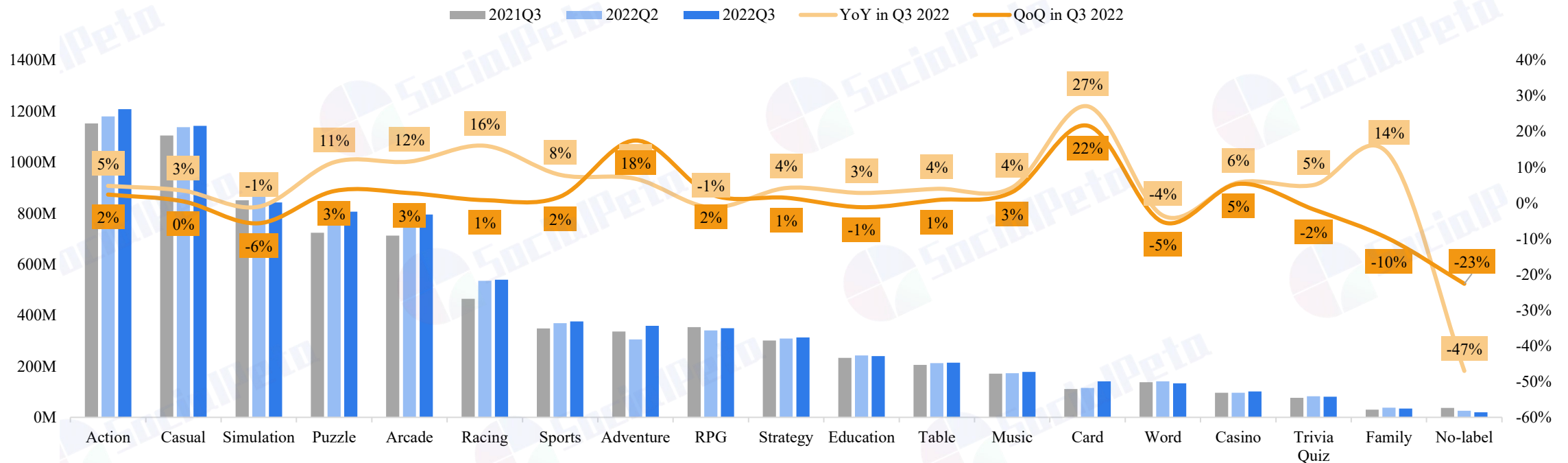


Puzzle and arcade games with “Medium market share, steady growth” increased significantly in downloads in Q3

The downloads of action, casual, and simulation games together accounted for 40% of the total downloads of all mobile games. But those game genres have a relatively fixed market which is hard for new games to enter.

In comparison, puzzle and arcade games grew in a steadier and faster way, with a higher possibility of innovation.

Downloads trends of mobile games (by game genre)



Insights into Global Mobile Game Marketing in Q3

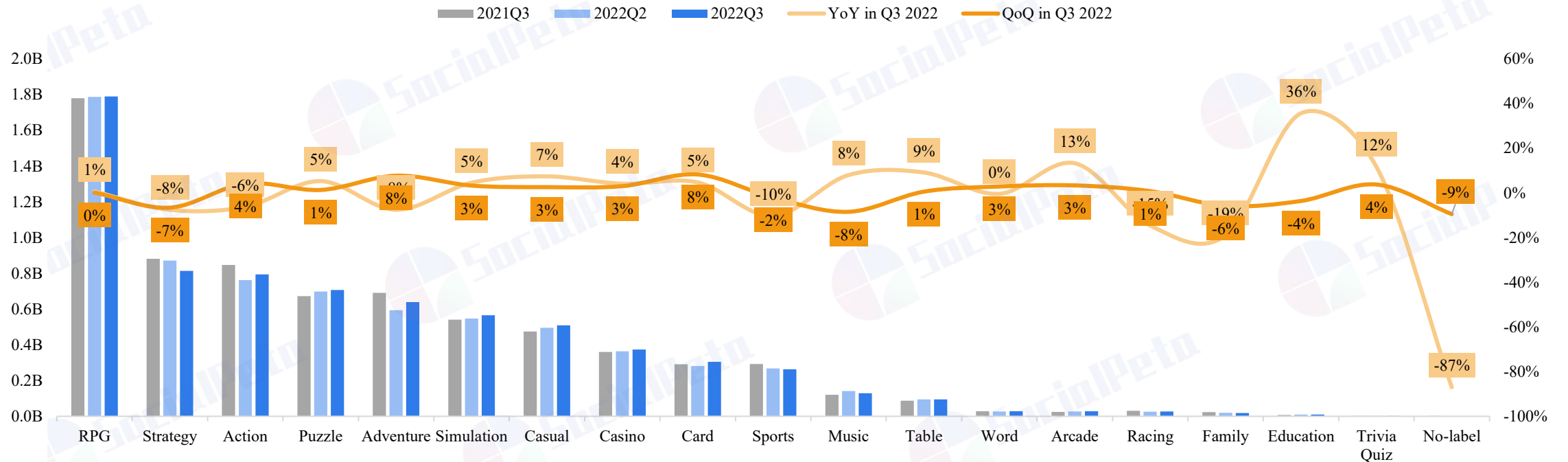


RPGs with “low market share, steady growth” were still high-grossing and had the highest IAP among all game genres

In terms of IAP, most game genres were stable, except a few genres had sharp ups and downs.

In an overall comparison, RPGs were still the highest grossing, recording over \$1.7 billion in IAP to account for over 25% of all IAP, more than twice as much as the IAP of strategy games which ranked No.2.

IAP (unit: \$) trends of mobile games (by game genre)



Top 10 Global Mobile Games by Advertising in Q3



| | | | |
|----|--|---|------------|
| 1 | | Coloring Book! Doodle Mobile | Board |
| 2 | | Township Playrix | Simulation |
| 3 | | 幻想名將傳 Doki Studio | RPG |
| 4 | | 英雄戰紀 Bingchuan Network | RPG |
| 5 | | The Grand Mafia Yotta Games | Strategy |
| 6 | | Evertale ZigZaGame | RPG |
| 7 | | The Ants StarUnion | Strategy |
| 8 | | Kids learning games ABC Keiki | Education |
| 9 | | Rise of Kingdoms Lilith Games | Strategy |
| 10 | | Fishdom Playrix | Puzzle |



| | | | |
|----|--|---------------------------------------|------------|
| 1 | | Epic Heroes Dinosaur-Games | Casual |
| 2 | | The Grand Mafia Yotta Games | Strategy |
| 3 | | Jackpot World™ Bole Games | Casino |
| 4 | | Travel Center Tycoon SONOW | Simulation |
| 5 | | Evony TOP GAMES | Strategy |
| 6 | | Last Fortress IM30 | Strategy |
| 7 | | 英雄戰紀 Bingchuan Network | RPG |
| 8 | | Lords Mobile IGG | Strategy |
| 9 | | Mafia City Yotta Games | Strategy |
| 10 | | Kingdom Guard Tap4Fun | Strategy |

Games use the casual game element in ad creatives that brought a fast increase in downloads.

On iOS, [Coloring Book!], a coloring board game, topped the advertising chart with over 4500 deduplicated creatives in Q3.

On Android, the casual game [Epic Heroes] topped the advertising chart with nearly 15000 deduplicated creatives in Q3.

Some games added the casual game element “dog head” in their ad creatives, which brought a fast increase in downloads. The RPG [Heroes of War] with its creatives mainly released in Hong Kong, Macao, and Taiwan also adopted such a strategy.

Insights into Global Mobile Game Marketing in Q3

Four valuable gameplays: simulation, strategy, RPG, casual

- **Strategy**

Strategy gameplay is one of the traditional ones and also the one that Chinese companies are good at. Among all strategy gameplays, SLG is the most popular. Recently, the animal-themed SLGs developed by Chinese developers were popular among players.

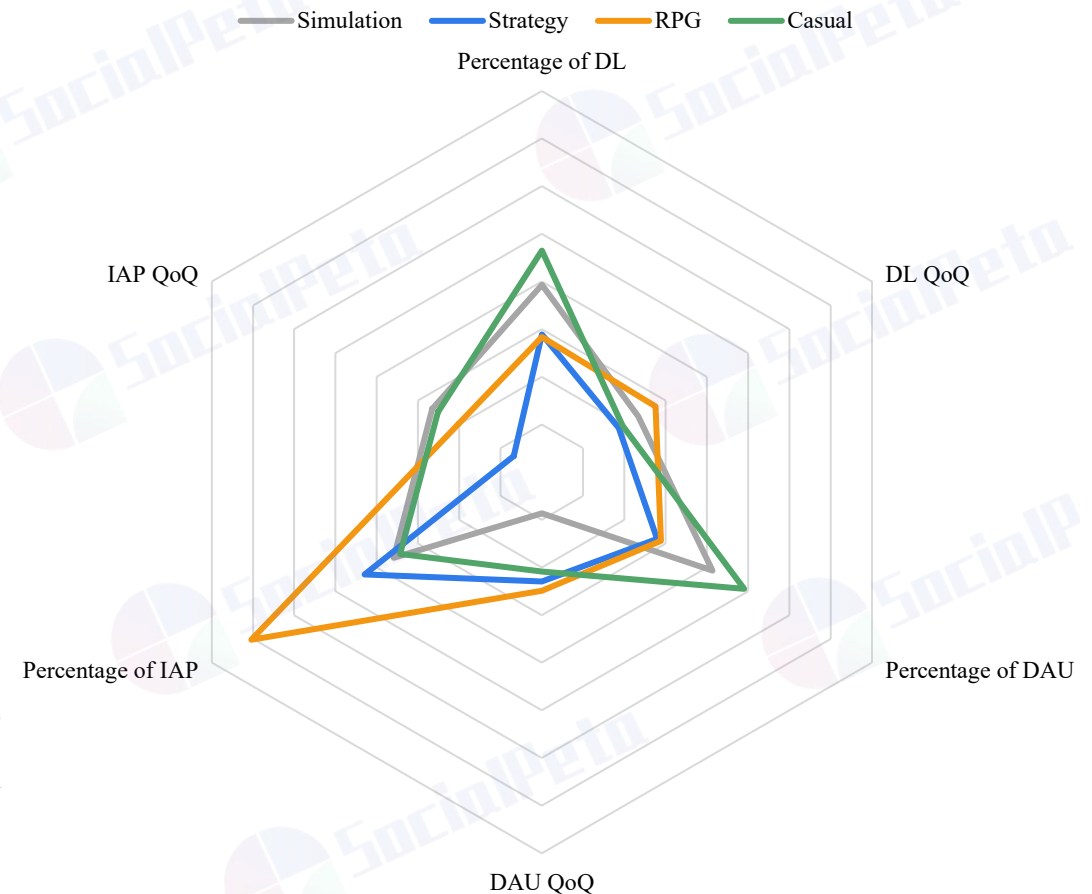
- **RPG**

RPGs are much higher-grossing than any other game genres.

- **Simulation & Casual**

Simulation and casual are two popular gameplays that can be seen in many games as the main gameplay or one of the combined gameplays. The two together had 1 billion users, a quarterly growth of over 10%.

Downloads & IAP of four valuable gameplays of mobile games



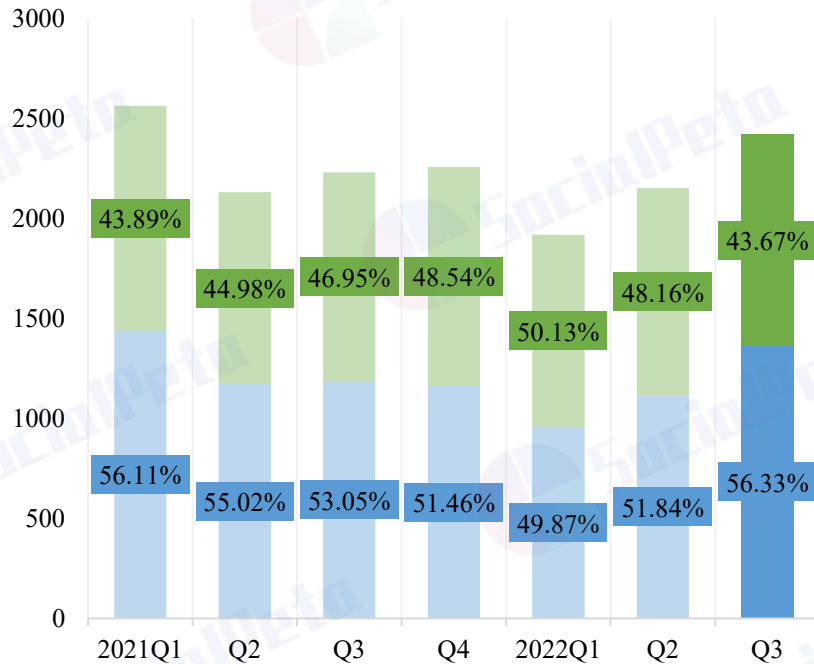


Insights into Strategy Mobile Games Marketing in Q3

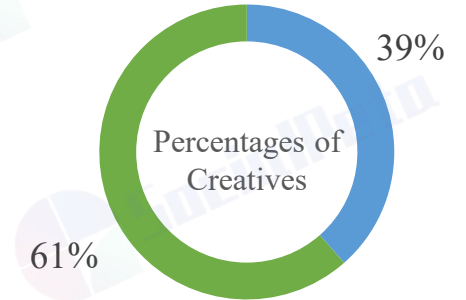
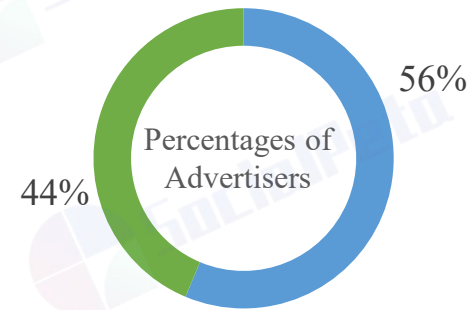
Insights into Strategy Mobile Game Advertising

In Q3, there were over 2400 strategy game advertisers, more of them on iOS, while with more creatives released on Android.

In Q3, the total number of strategy game advertisers increased by 8.4% YoY, which was a QoQ growth of 12.4%. There were 887 average creatives on Android, 28.9% higher than that on iOS.



Trends of numbers of advertisers on iOS and Android



Android

887

Average creatives quantity in Q3 2022



iOS

688

Average creatives quantity in Q3 2022

Top 10 Strategy Mobile Games by Advertising in Q3



| Rank | Game Icon | Game Name | Genre |
|------|-----------|---|---------------------|
| 1 | | The Grand Mafia Yotta Games | Mafia SLG |
| 2 | | The Ants StarUnion | Ant SLG |
| 3 | | Rise of Kingdoms Lilith Games | War SLG |
| 4 | | 歡樂大東家 EWORLD | Business Simulation |
| 5 | | Kingdom Guard Tap4Fun | Tower Defense SLG |
| 6 | | Last Fortress IM30 | Apocalyptic SLG |
| 7 | | T3 Arena XD Inc. | Multiplayer |
| 8 | | 富甲江戶城 Yogame | Business Simulation |
| 9 | | Evony TOP GAMES | War SLG |
| 10 | | Three Kingdoms Origin DeNA | Three Kingdoms SLG |

| Rank | Game Icon | Game Name | Genre |
|------|-----------|--|-------------------|
| 1 | | The Grand Mafia Yotta Games | Mafia SLG |
| 2 | | Lords Mobile IGG | War SLG |
| 3 | | Last Fortress IM30 | Apocalyptic SLG |
| 4 | | Evony TOP GAMES | War SLG |
| 5 | | Kingdom Guard Tap4Fun | Tower Defense SLG |
| 6 | | Mafia City Yotta Games | Mafia SLG |
| 7 | | Rise of Empires IM30 | War SLG |
| 8 | | The Ants StarUnion | Ant SLG |
| 9 | | Puzzles & Survival 37Games | Apocalyptic SLG |
| 10 | | State of Survival FunPlus | Apocalyptic SLG |

SLG

Dominates the Advertising Chart of Strategy Games

The No.1 game on the advertising chart of strategy games in Q3 was The Grand Mafia, a Mafia SLG of Yotta Games, with over 1700 deduplicated creatives on the App Store and Google Play combined.

Top 10 games on the Android chart were all SLGs, while top 10 games on the iOS chart were relatively more diversified in genre.

Overall, Chinese game advertisers contributed more strategy game advertising and most of the advertised games were SLGs.

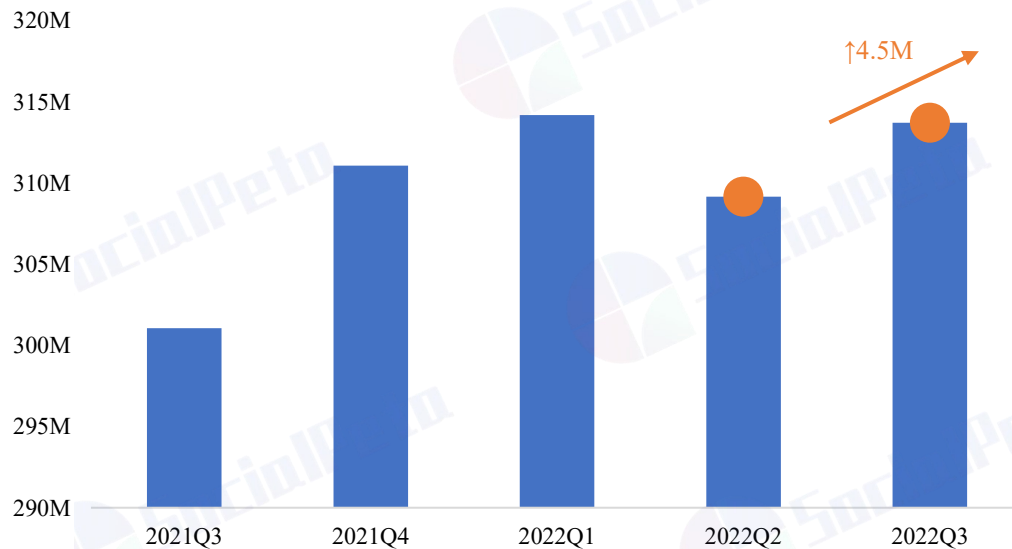
Insights into Strategy Mobile Game Marketing

Strategy mobile games: A slight decline in users in Q3

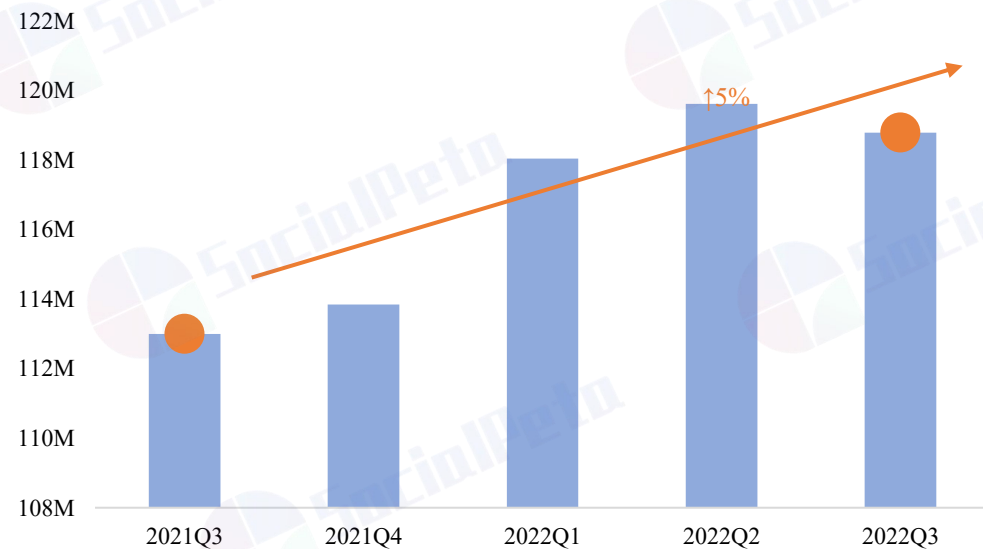
Compared to Q2, strategy games had an increase of about 4.5 million in downloads in Q3. But the increase in downloads didn't result in an increase in DAUs.

Through further study, we can see that the increased downloads were most from mobile games released in 2019 or later, and the increased DAUs which was less than the users lost from other games, which means the loss of users in-game market was not filled.

Trends of downloads of strategy games



Trends of DAUs of strategy games



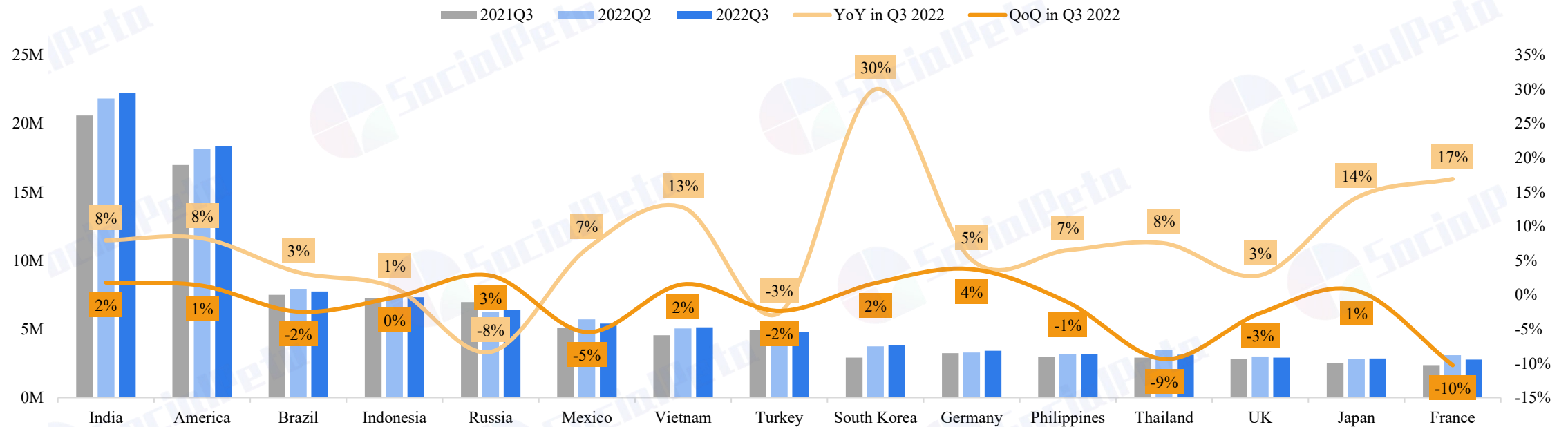
Insights into Strategy Mobile Game Marketing

India and America contributed the main DAUs for strategy games, while Japan and South Korea had a good growth of DAUs.

India and America were the main regions for strategy games, which had large numbers and stable growths of users.

Emerging markets including Indonesia and Brazil recorded stable growths in Q3, while Mexico and Vietnam saw dramatic increases in strategy game DAUs.

DAU trends of strategy games in top 15 regions

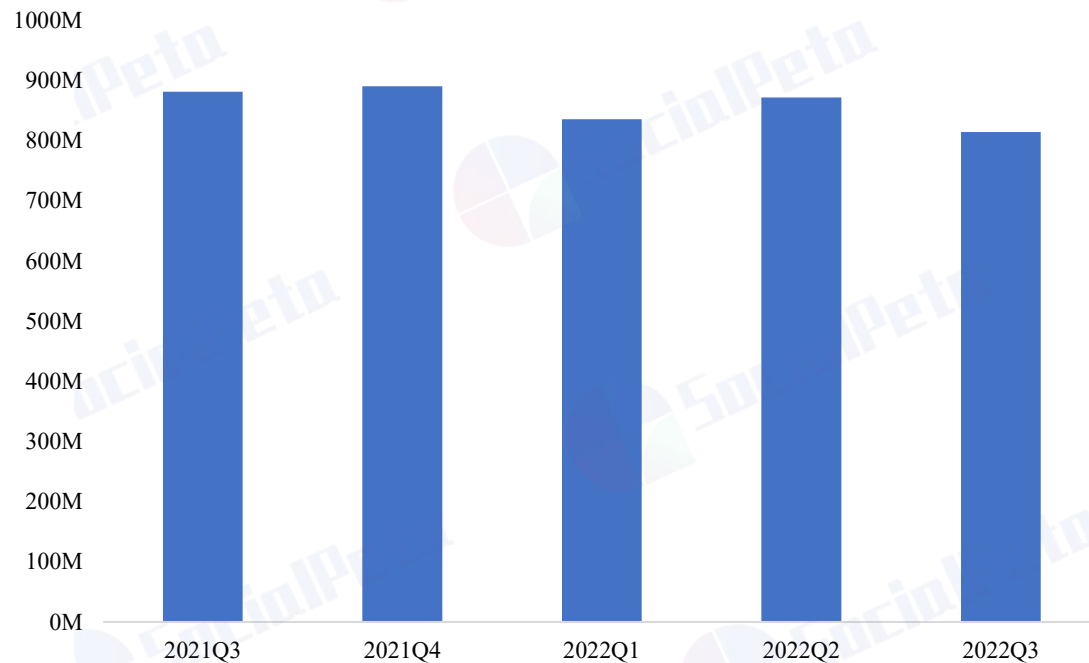


Insights into Strategy Mobile Game Marketing

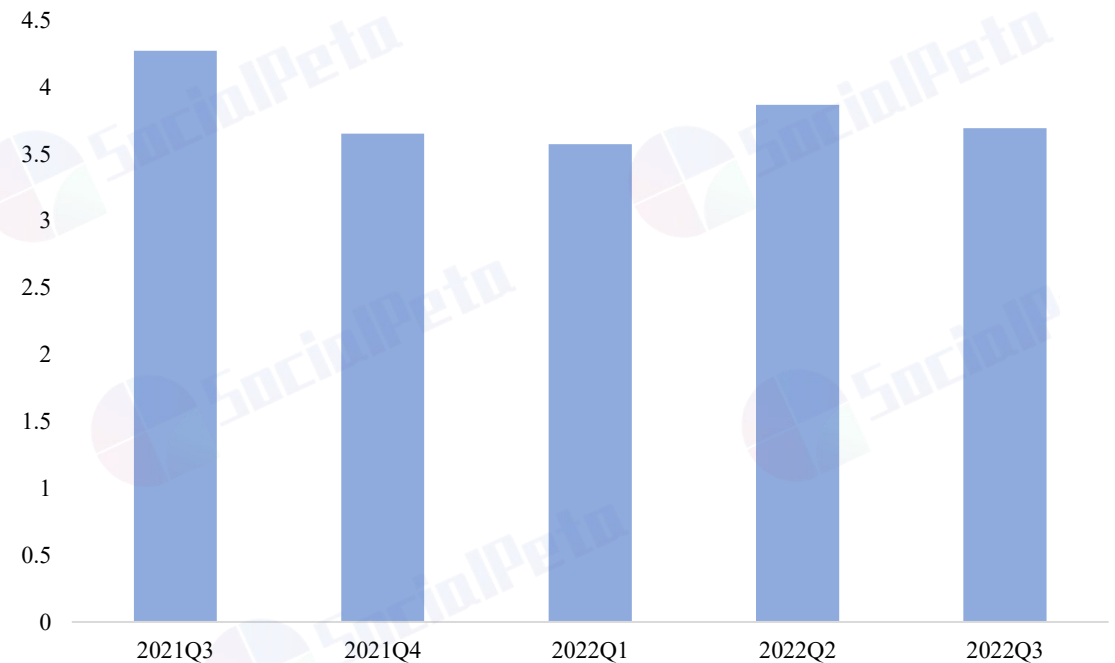
A slight decline in IAP, a relatively stable ARPU

In Q3, global strategy games had a 1% decline of DAUs, and a 6% decline of IAP, with each single user's spending changing within a normal growth range.

IAP (unit: \$) trends of strategy games



ARPU (unit: \$) trends of strategy games

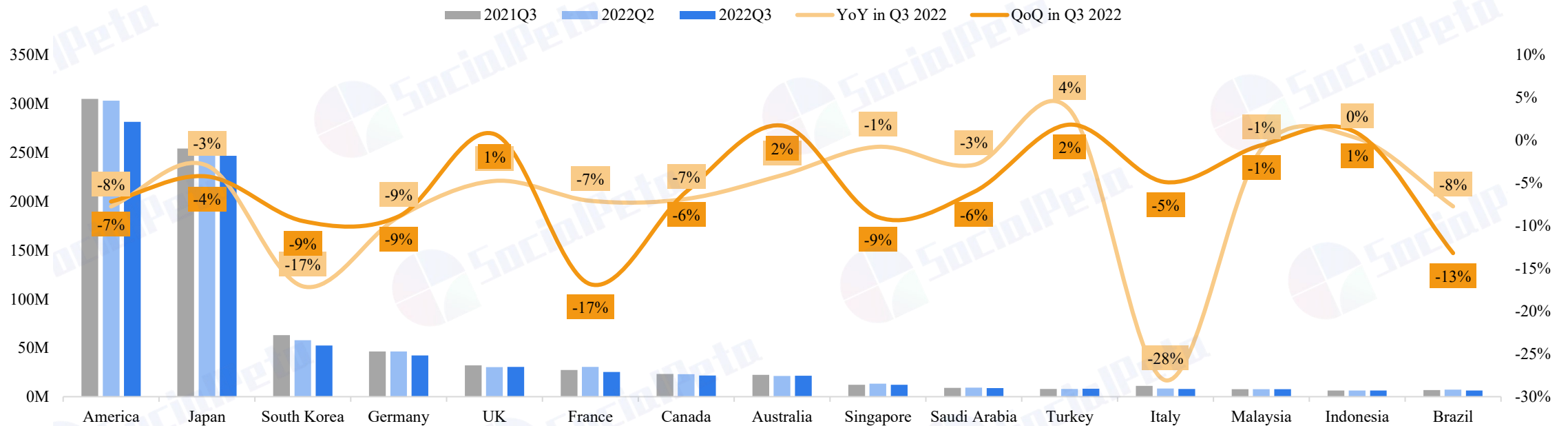


Insights into Strategy Mobile Game Marketing

IAP revenue was volatile, dropping sharply in America, Japan and South Korea in Q3

Strategy games mainly generated revenue from America and Japan. The two regions contributed 65% of total revenue of strategy games, but experienced obvious declines in Q3, which was challenging.

IAP (unit: \$) trends of strategy games in top 15 regions



Case Study: Strategy Mobile Game Advertisers



Evony

TOP GAMES

The strategy game [Evony] has long remained one of the top 10 best-selling games on the App Store in America. The game topped the best-selling chart of strategy games in America in Q3 many times. The game’s promotional video “BATTLE OF EVONY” was played at the 2017 Super Bowl.

Top Games Inc. was founded in 2015, with its registered address in America.

450+

Days of Duration

2.5K

Deduplicated
Creatives on iOS

10.2K

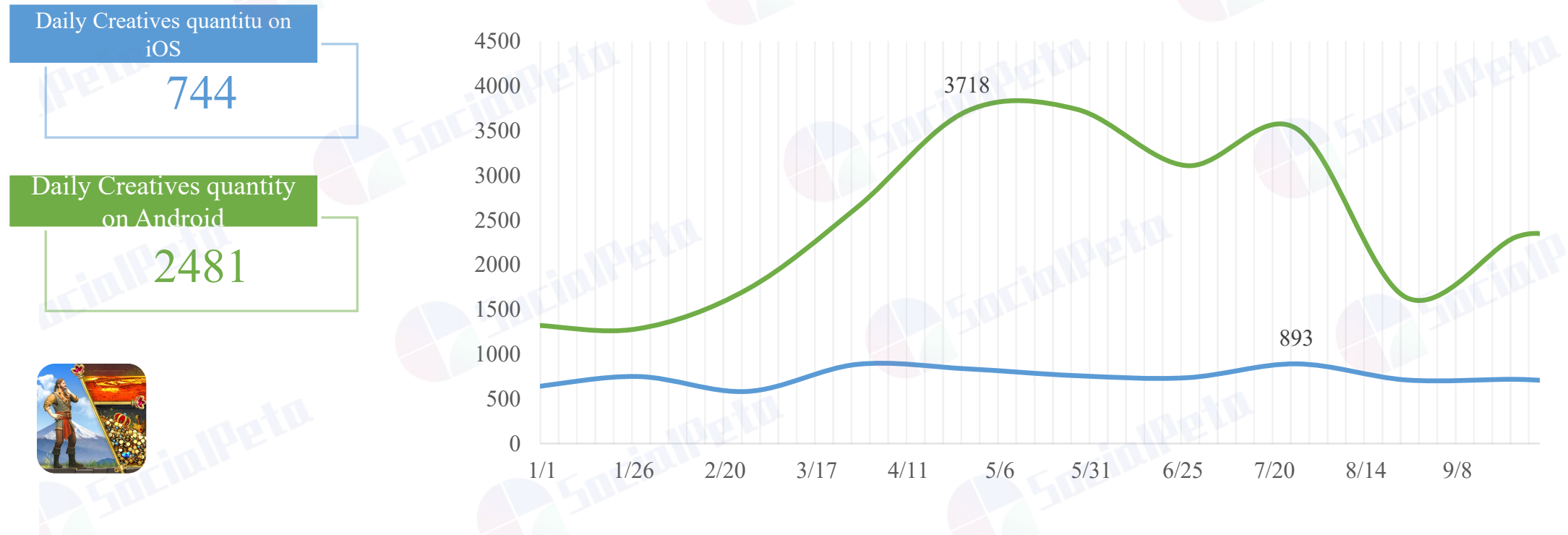
Deduplicated
Creatives on Android

Insights into [Evony]’s Global Advertising

There were **nearly 2500** daily creatives on Android, **230% more** than that on iOS.

The game mainly released creatives on Android, with 2481 daily creatives; the peak of creatives on Android was in April-July, **peaking at over 3700** daily creatives

It had 744 daily creatives on iOS, the overall trend was relatively stable. The peak emerged in August with **nearly 900** daily creatives.

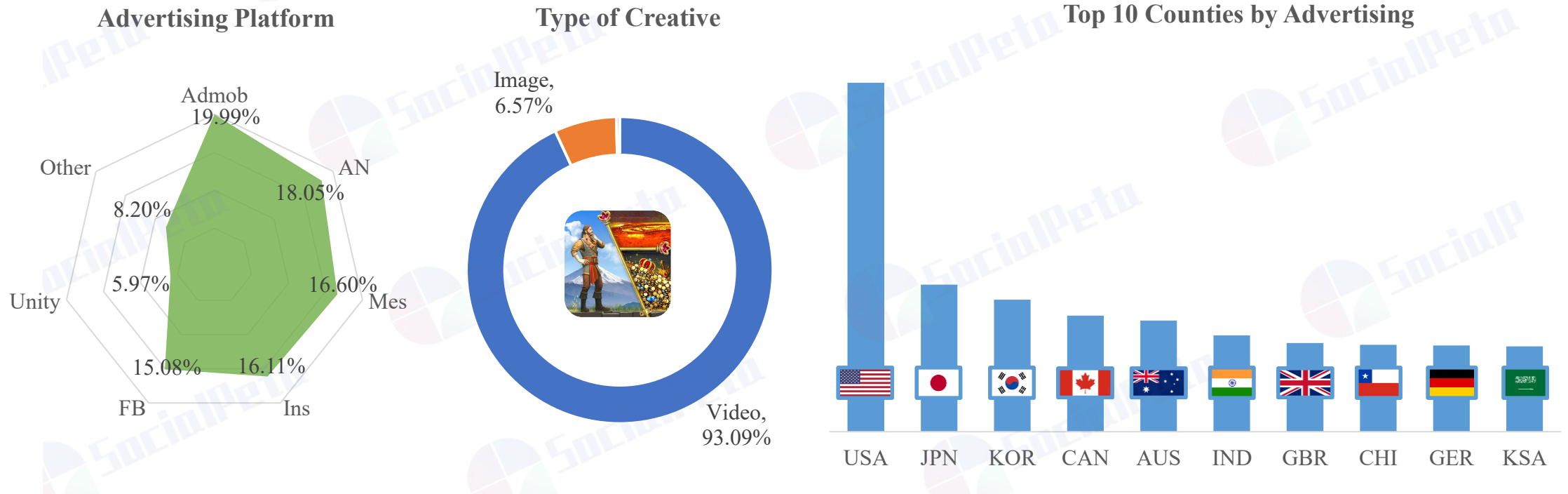


Analysis of [Evony]’s Advertising Strategy on the Andriod device

Most creatives were released in America, Japan, South Korea; with nearly 20% of its creatives on Admob

Google Ads (Admob) was its main advertising platform where nearly 20% of its creatives were released. Audience Network (AN) had the most creatives among all FB platforms, which were over 18% of the game’s creatives.

93% of its creatives were video, 4.85% higher than the average percentage of strategy games. Most of its creatives were released in America, 137% higher than that in Japan which was ranked No.2.



[Evony]'s Popular Creative in Q3



Duration: 99 days

Dimensions: 1280 * 720

Advertising Platform: Google Ads

Advertising Copy:



Challenge the Puzzle Now
Try and solve the puzzles.

Local actor + Pin pulling puzzles

Most infectious and funny

Estimated Impressions: 414.4K

Popularity: 394

Analysis Model of Popular Creatives

01 Duration

The longer duration means the advertiser continues using the creative to attract more users, and also means the creative is more valuable.

02 Impressions

An impression is when an ad creative is fetched from its source. Impressions are a reference indicator of creatives' quality.

03 Popularity

A comprehensive index and one of the key indexes for deciding a new creative's potential.

04 Original Display

Original-post ads allow to view the display results of original news feed ads, and also allow further observation of real interactive effects.

05 Interaction indicator

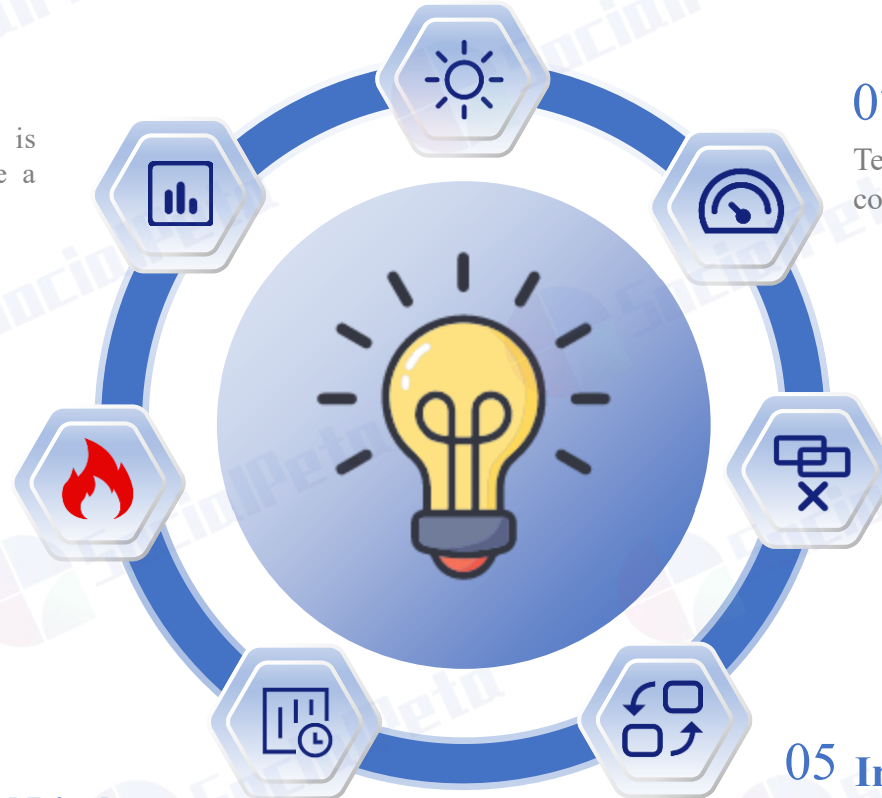
An indicator based on the original-post data exclusive to SocialPeta. It's the nearest to conversion index.

07 Daily updated database

Tens of millions of data are updated every day to ensure a complete data coverage.

06 Multidimensional Removal of Duplicates

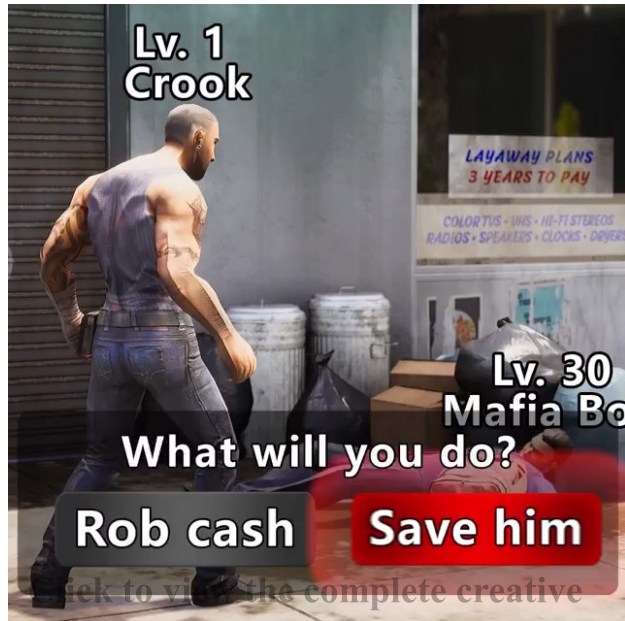
The precise display of effective creatives can greatly improve the search and output efficiency.



Analysis of Popular Creatives for Strategy SLGs

Strategy games had the highest average number of creatives which were more diversified and funny.

Different options leading to win or fail



Combined with hyper-casual, to secure more diversified users



Inspired by PC games, a full display of its gameplay



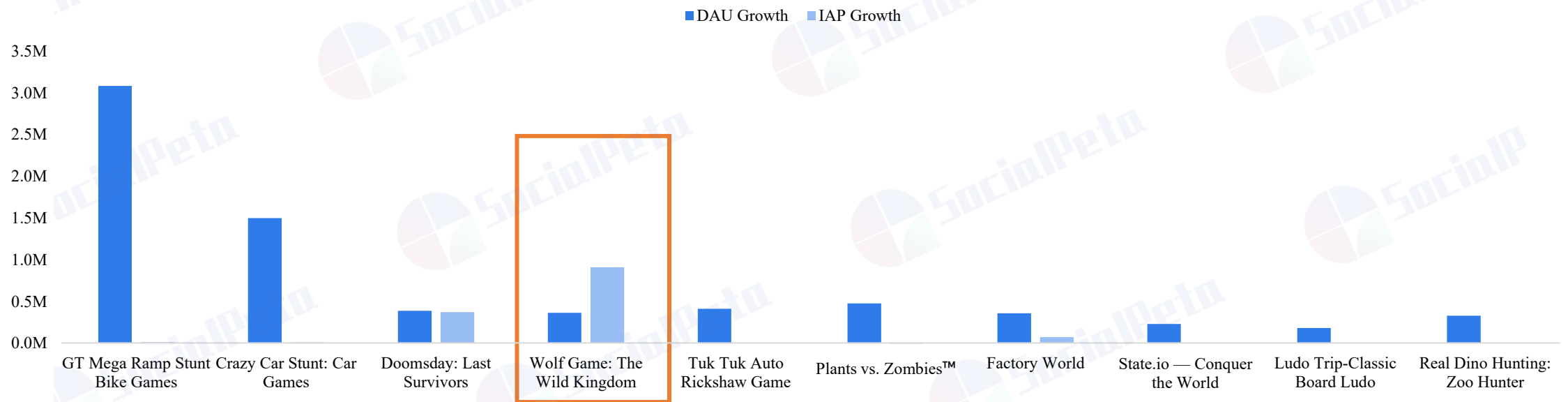
Insights into Strategy Mobile Game Marketing

The Chinese game [Wolf Game] had a user growth and a revenue growth.

The two racing strategy games [GT Mega Ramp Stunt Bike Games] and [Crazy Car Stunt: Car Games] recorded great increases of users but very slight increases of revenue.

[Wolf Game: The Wild Kingdom] had the greatest growth of revenue. It's a SLG developed by a Chinese company. It was a hit game themed on wolves. It quickly gained global popularity upon its release. Its popularity is not common. Other Chinese SLGs that are themed on animals were all well received. For details, please see the next page.

Downloads and IAP trends of Top 10 strategy games by DAU in Q3 2022



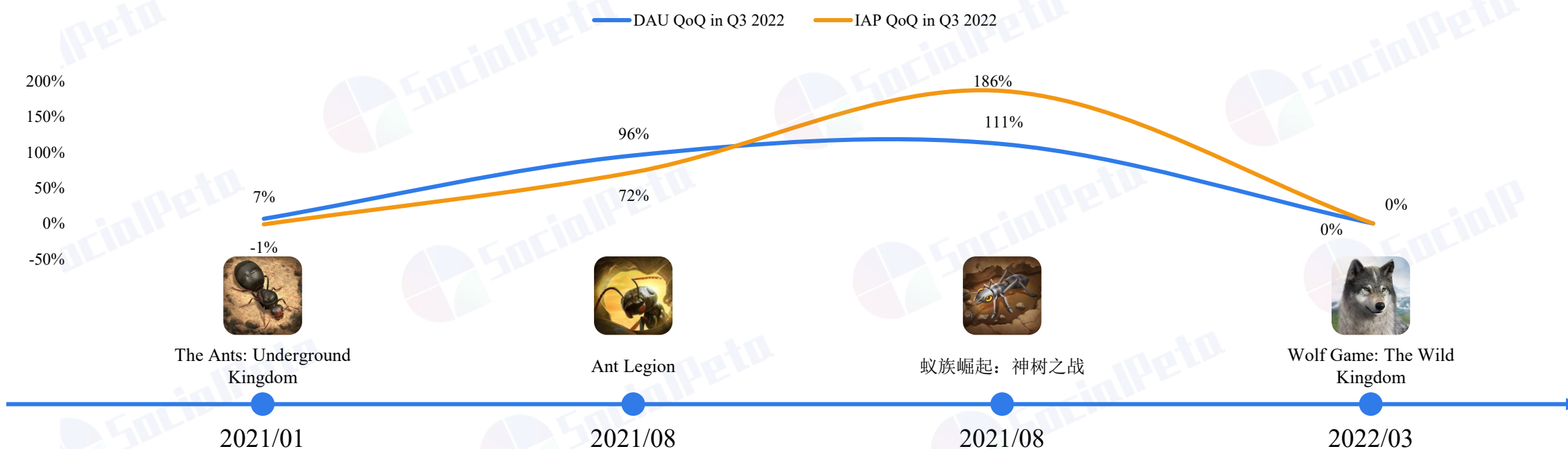
Insights into Strategy Mobile Game Marketing

Animal-themed SLGs grew rapidly. The market opportunity was yet to be searched for.

According to incomplete statistics, **there were 4 animal-themed SLGs with great performance globally.** They were all developed by Chinese companies. Except for [蚁族崛起：神树之战] that was only released on China's mainland, the other three games all had their own global versions.

And, [The Ants: Underground Kingdom]'s global version was even released before its Chinese version.

Downloads and IAP (Unit: \$) trends of animal-themed SLGs



Source: OpenMediation, based on processed market data

Date Range: Jan. 2021 – Sept. 2022; Note: [Wolf Game] was released in March 2022 and started to grow in August 2022. With the data of Q2 2022 missing, its QoQ change of DAUs in Q3 2022 and QoQ change of IAP in Q3 2022 were both 0%.

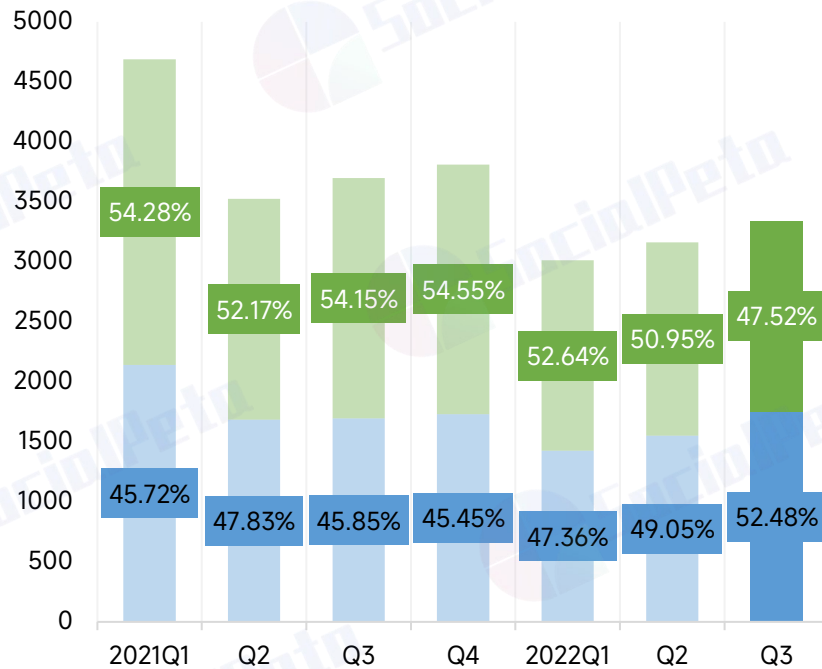


Insights into RPGs Marketing in Q3

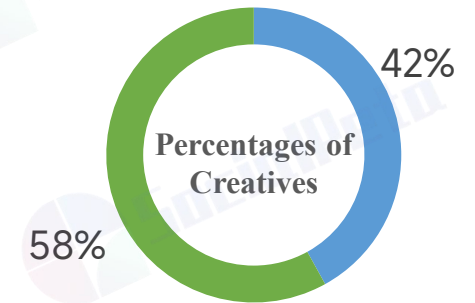
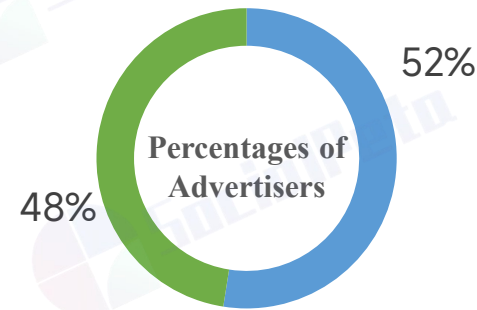
Insights into RPG Advertising

In Q3, there were over 3300 RPG advertisers, more of them on iOS than Android.

In Q3, the total number of RPG advertisers **dropped by 9.6% YoY, which was a QoQ growth of 5.6%**. There were 646 average creatives on Android, 10.4% higher than that on iOS.



Trends of numbers of advertisers on iOS and Android



Android

646

Average creatives in Q3 2022



iOS

585

Average creatives in Q3 2022

Top 10 RPGs by Advertising in Q3



| | | | |
|----|---|-------------------|---------------------|
| 1 |  | 幻想名將傳 | Card |
| | | Doki Studio | |
| 2 |  | 英雄戰紀 | Card |
| | | Bingchuan Network | |
| 3 |  | Evertale (亙古幻想) | Japanese |
| | | ZigZaGame | |
| 4 |  | Dynasty Legends 2 | MMO |
| | | Taihe Interactive | |
| 5 |  | X-HERO | Card |
| | | Bingchuan Network | |
| 6 |  | 暁ノ天刃録 | MMO |
| | | 广州点盛 | |
| 7 |  | Overmortal | Cultivation Stories |
| | | Leiting Games | |
| 8 |  | 엑자일: 어벤징 파이어 | MMO |
| | | SpringGame | |
| 9 |  | 花舞宮廷 | Palace |
| | | Origin Mood | |
| 10 |  | 時之約 | MMO |
| | | Eskyfun | |



| | | | |
|----|---|----------------------------------|---------------------|
| 1 |  | 英雄戰紀 | Card |
| | | Bingchuan Network | |
| 2 |  | Overmortal | Cultivation Stories |
| | | Leiting Games | |
| 3 |  | 幻想名將傳 | Card |
| | | Doki Studio | |
| 4 |  | Ultimate Arena of Fate | Card |
| | | Orchid Savona Technology Limited | |
| 5 |  | 一念逍遙 | Cultivation Stories |
| | | Leiting Games | |
| 6 |  | 時之約 | MMO |
| | | Eskyfun | |
| 7 |  | 花舞宮廷 | Palace |
| | | Origin Mood | |
| 8 |  | Mighty Party | Card |
| | | Panoramik Games | |
| 9 |  | Saint Seiya | Card |
| | | Wanda Cinemas Games | |
| 10 |  | Legend of the Phoenix | Palace |
| | | Modo Global | |

Hyper-Casual Creatives to Bring in Popularity

[Heroes of War], an idle casino RPG of Bingchuan Network, had the most deduplicated creatives among all RPG advertisers in Q3. The game mainly released creatives in China's Hong Kong, Macao, and Taiwan regions, and had over 13000 deduplicated creatives on the App Store and Google Play combined in Q3.

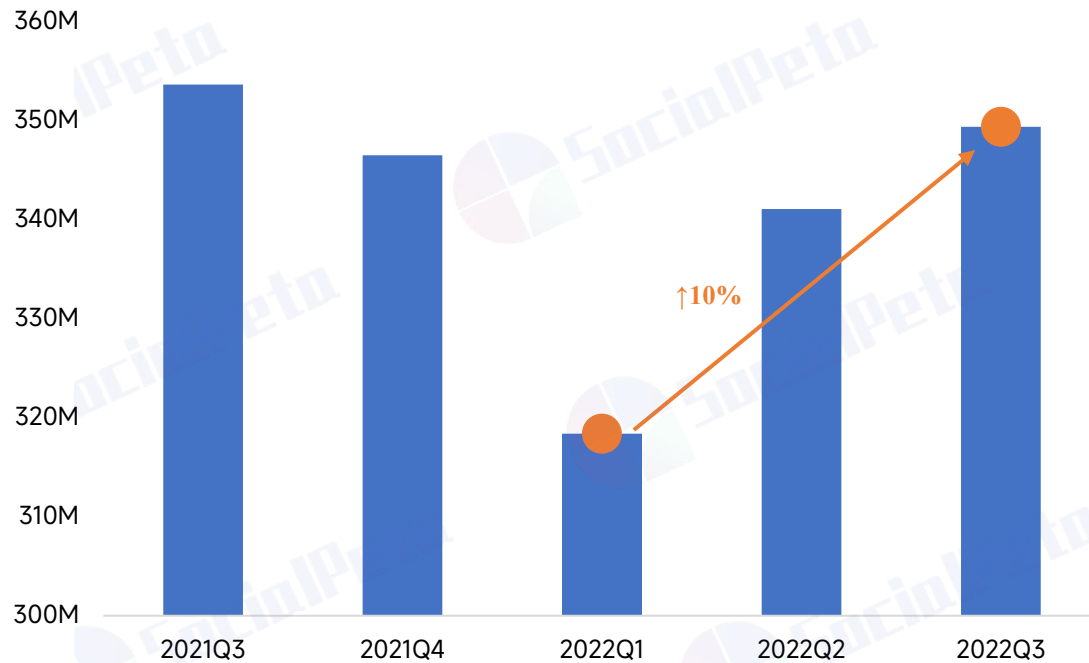
[X-HERO] and other card RPGs achieved great response by combining “dog head” elements and media buying in their advertising creatives released in late August. Many companies followed the example later. Overall, RPGs’ creatives were mainly released in Asia-Pacific region, and mobile game companies in Guangzhou, China were outstanding in advertising.

Insights into RPG Marketing

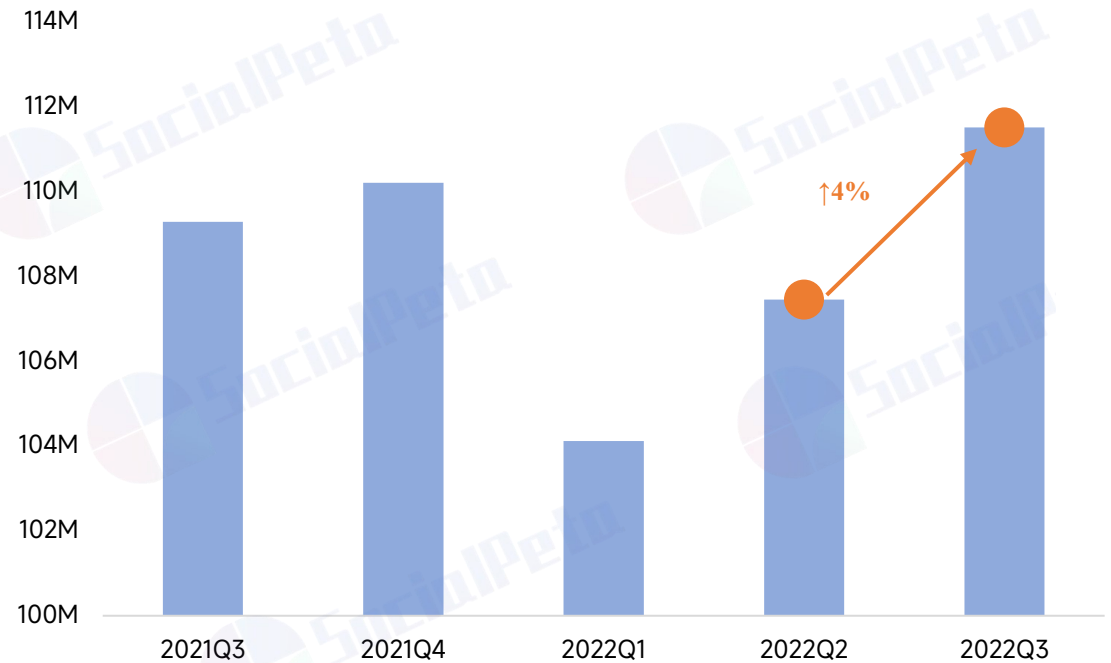
RPGs: A recovery to the level of the same period last year

Compared to the early 2022, **RPGs had an increase of 10% in downloads**, reaching a level basically the same as 2021's peak; the DAUs increased by 7% (compared to a 4% increase in the last quarter), reaching a level higher than 2021's peak.

Trends of downloads of RPGs



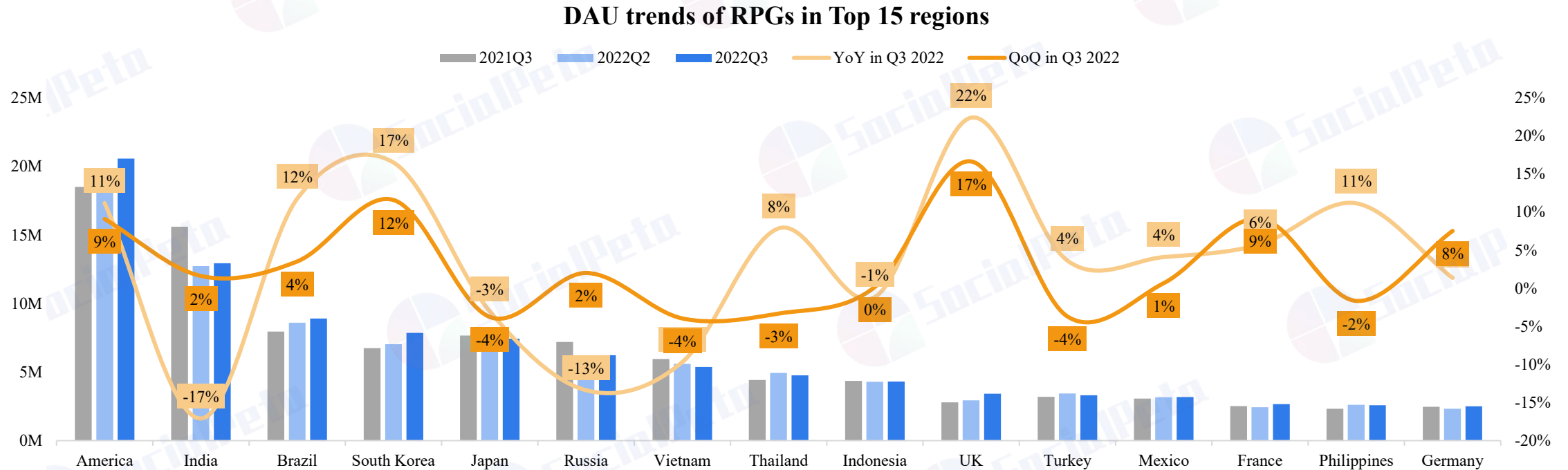
Trends of DAUs of RPGs



Insights into RPG Marketing

RPGs were growing fast in Brazil

America was the biggest market for RPGs, and also one of the fastest-growing markets. Meanwhile, RPGs grew considerably in European countries (England, France, and Germany). It is noteworthy that DAUs in India and Brazil were increased to be as many as that in America. DAUs in Brazil reported a very high quarterly growth of 12% YoY in Q3.

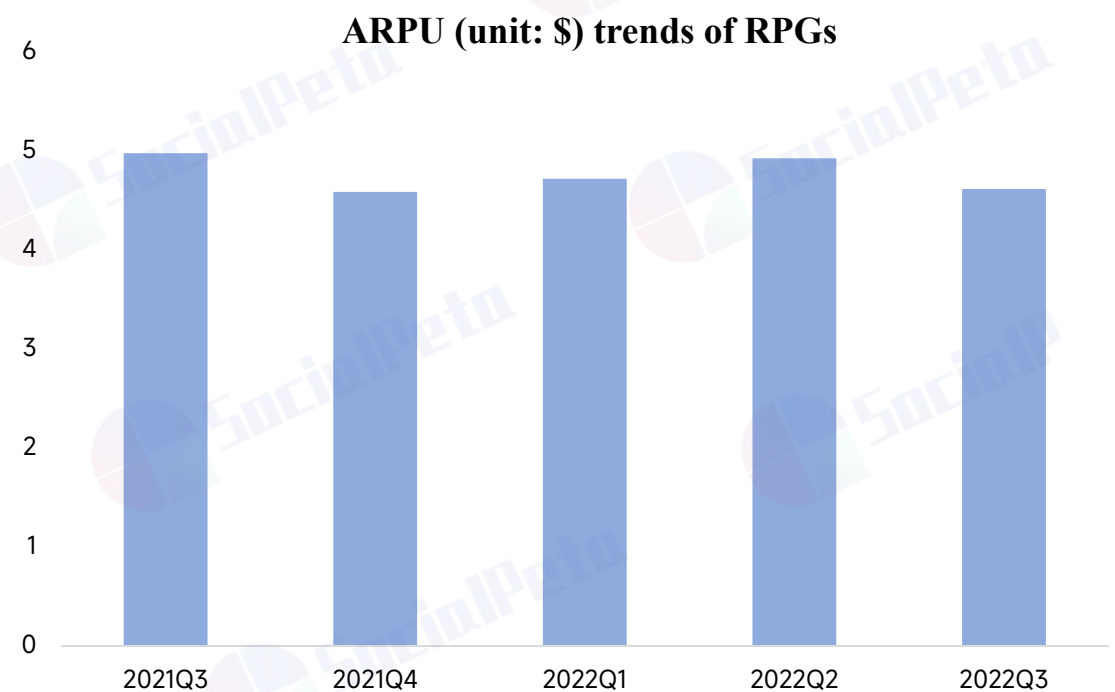
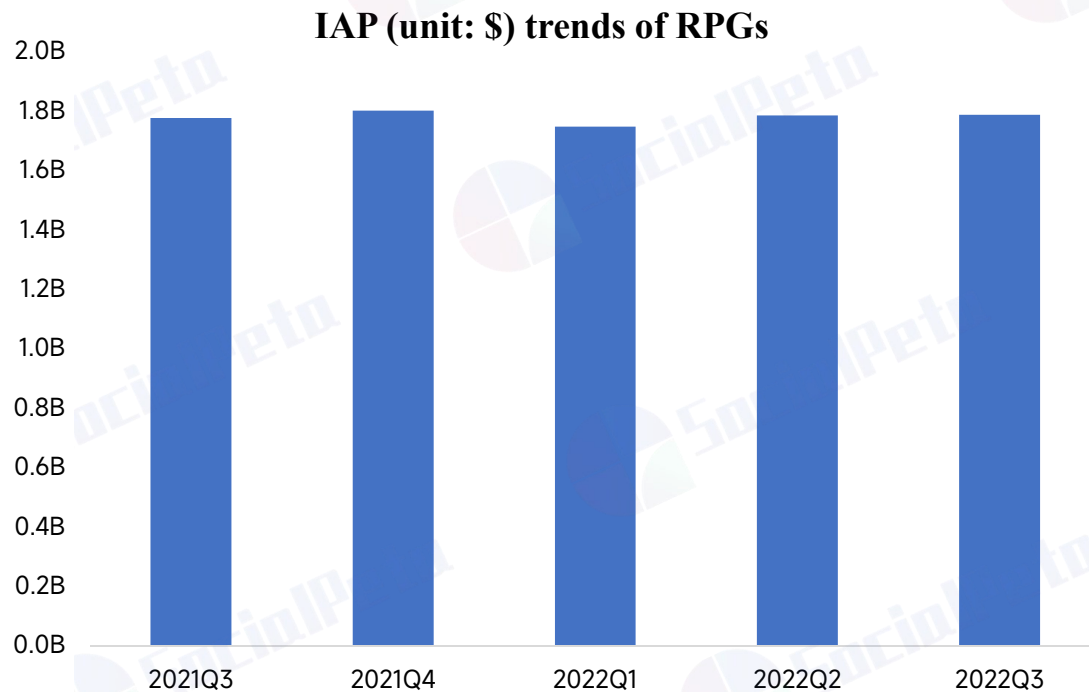


Insights into RPG Marketing

RPG reported a stable revenue in Q3 while a slight decline in ARPU

RPGs are always a high-grossing and well-established genre. RPGs are stable, with **their increases and decreases less than 2%**, and an overall **revenue of over \$1.7 billion**.

Compared to Q2 2022, the ARPU in Q3 decreased by 6%.



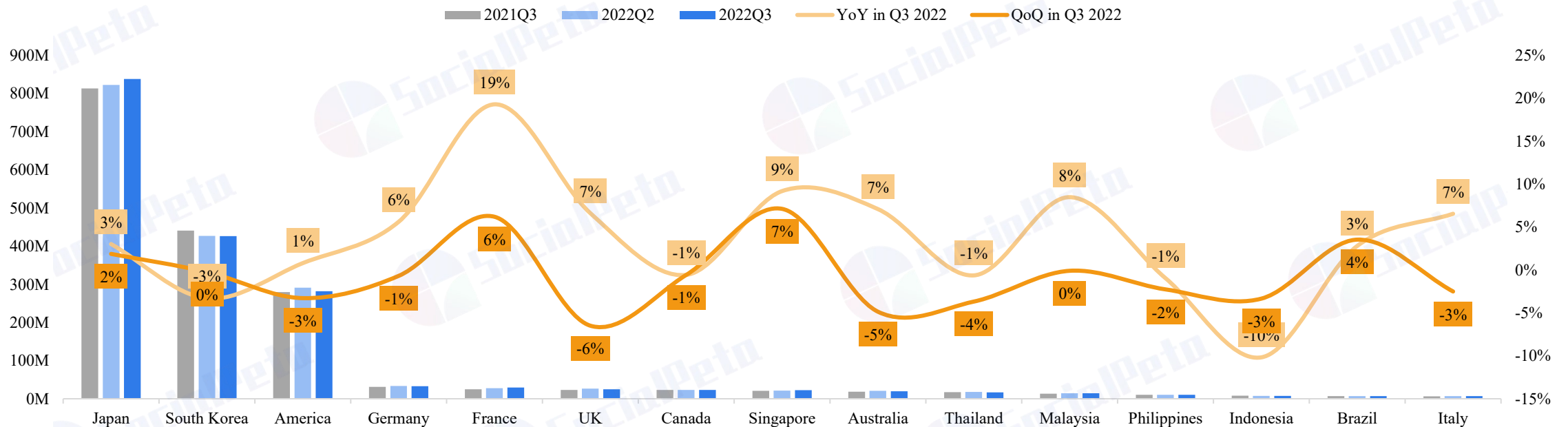
Insights into RPG Marketing



RPGs generated the most revenue in Japan and South Korea.

Japan and South Korea are the main sources of revenue for RPGs, which is mainly because **local players there love to play anime-style education RPGs.**

IAP (unit: \$) trends of RPGs in Top 15 regions



Popular RPG Advertisers



Heroes of War

Bingchuan Network

[Heroes of War] is a superhero **idle card RPG**. The game was released for Android in 2012, but it was released for iOS in China's Hong Kong, Macao and Taiwan regions on 22 August this year and topped the free chart in Taiwan on 4 September. It is **still among the top 5 free games in Taiwan**.

Bingchuan Network's classic game [X-HERO] started to gain popularity again in August thanks to its "dog head" creatives. Later, the company's other card RPGs tried to combine such creative pattern with the games, in order to attract more players through the **combination of hyper-casual gameplay and level-ups and through MiniGame**.

50+

Days of Duration

3.7K

Deduplicated Creatives on iOS

9.8K

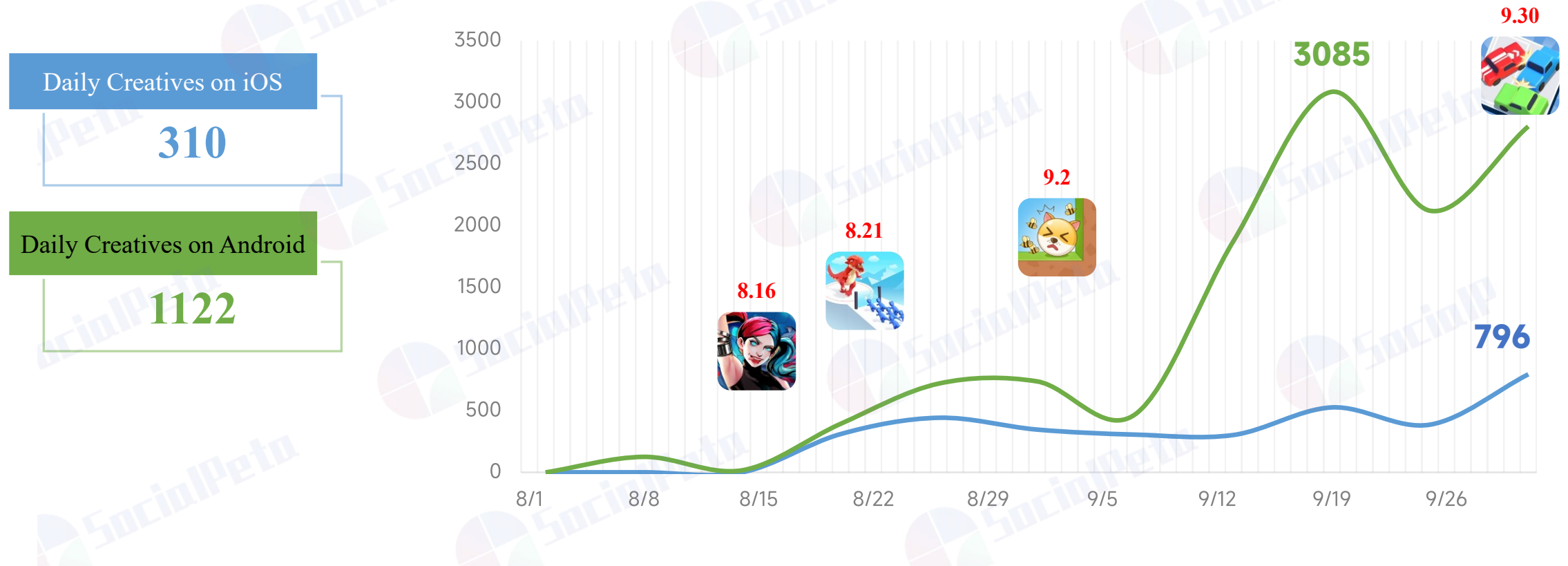
Deduplicated Creatives on Android

Insights into [Heroes of War]’s Global Advertising

Creatives were increased over time and **different product icons were adopted.**

The game mainly released its creatives on Android. Its daily creatives on Android **were 2.6 times as many as those on iOS.** Its massive advertising on both Android & iOS started on 13 August, with two peaks of creatives on 5 September and before China’s National Day.

The game had 4 versions of icons in Q3. **Each icon changing meant a change in advertising strategy.**

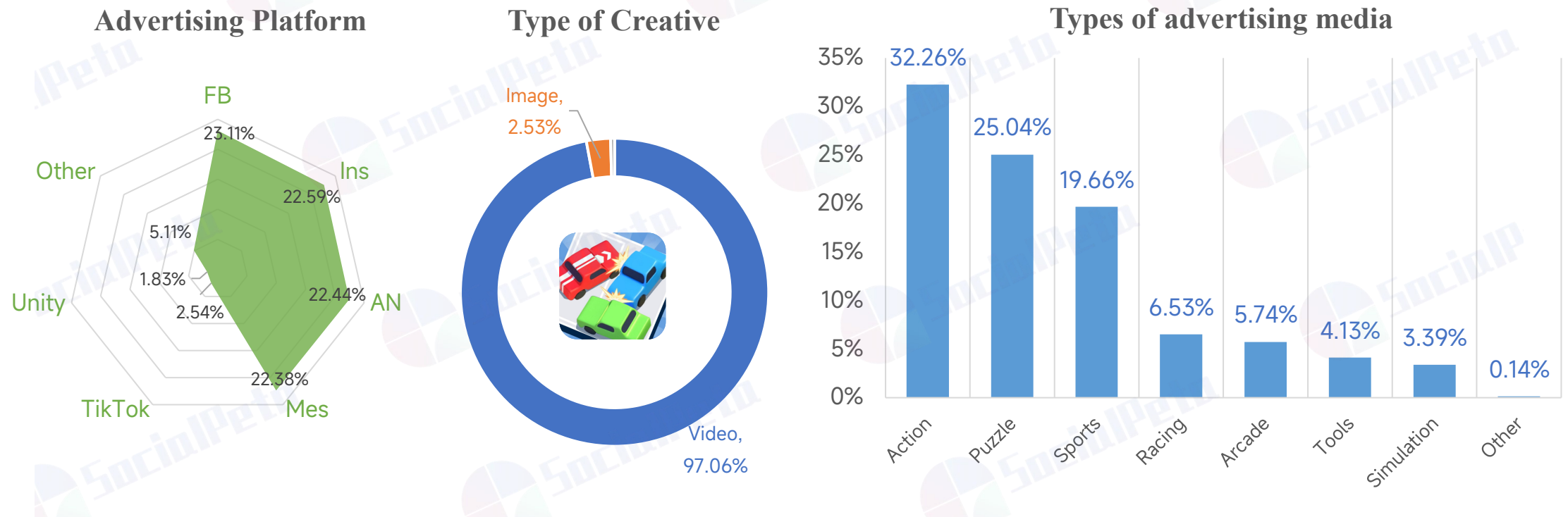


Analysis of [Heroes of War]’s Android Advertising

Over 90% of its creatives were on Meta platforms; action game media were its main advertising platform.

Meta platforms were its main advertising platform where over 90% of its creatives were released. Among those platforms, creatives on FB News Feed accounted for the highest percentage.

In terms of creatives’ formats, 97% of the game’s creatives were video, and 32.26% of its creatives were released on action game media.



Analysis of [Heroes of War]’s Creatives in Q3

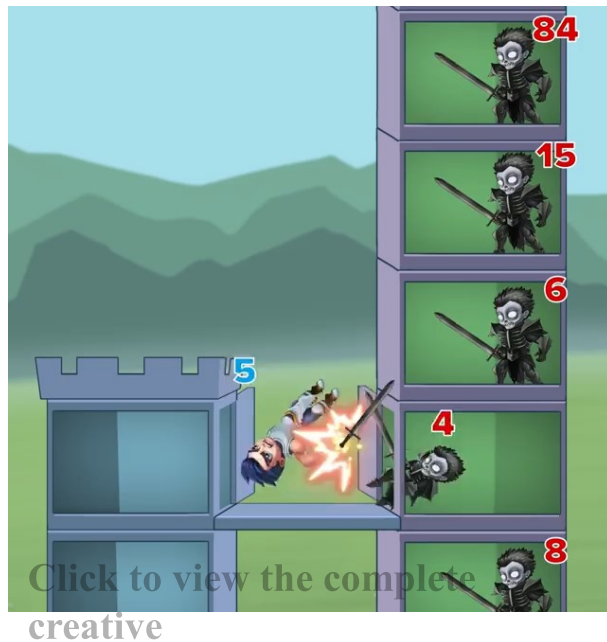
More diversified combinations of MiniGame and the game



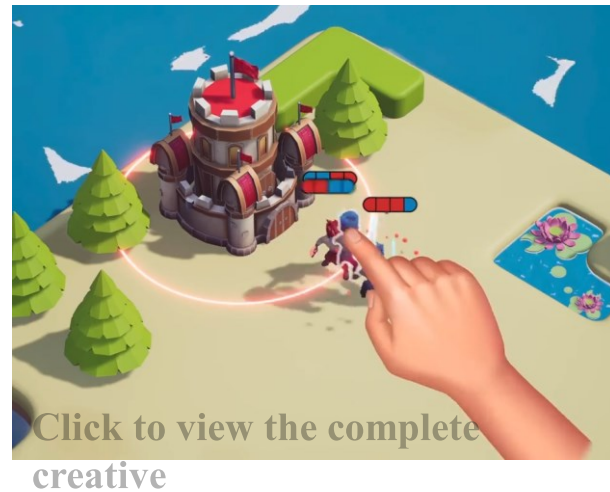
RPGs' Other MINIGAME Creatives

[Hero Wars] as one of the top explorers in MiniGame creatives, has had many popular advertising creatives

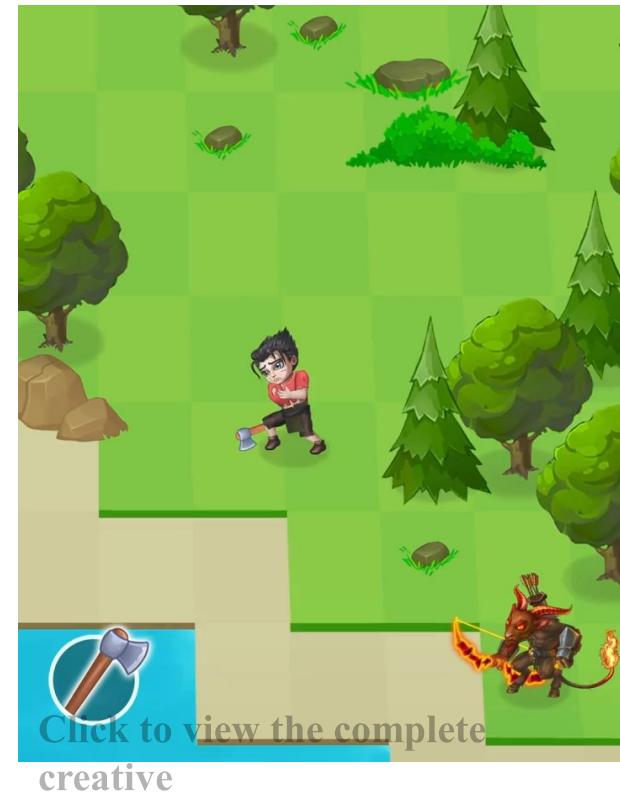
Classic tower climbing



Adventure & merge



Big world exploration

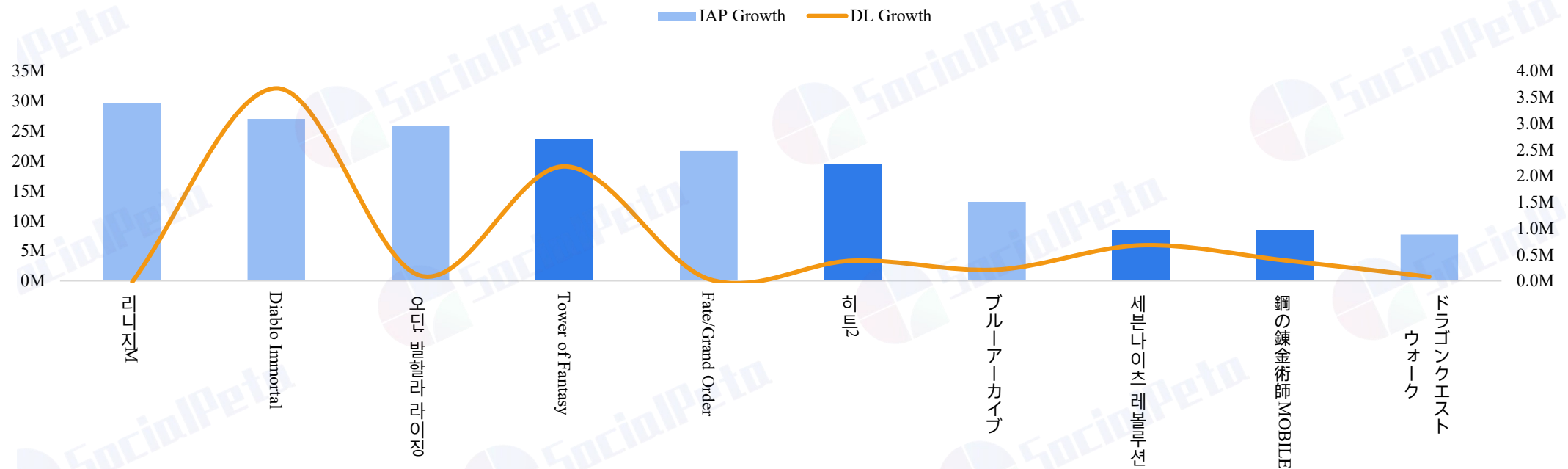



Insights into RPG Mobile Games Marketing

RPGs: new IP games quickly gained popularity

Among the top 10 RPGs by revenue, **8 out of them gained their major revenue from Japan and Korea**, including the new games [히트2] and [鋼の錬金術師 MOBILE]. [Diablo Immortal] and [Tower of Fantasy], which was just released globally, **Japan has become their biggest market**. Japanese and South Korean users were highly willing to pay for RPGs, and they are more interested in games based on licensed IP.

Downloads trends of Top 10 RPGs by IAP (unit: \$) in Q3 2022



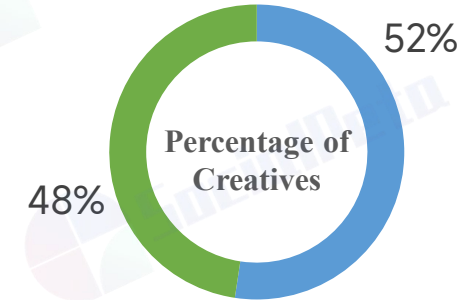
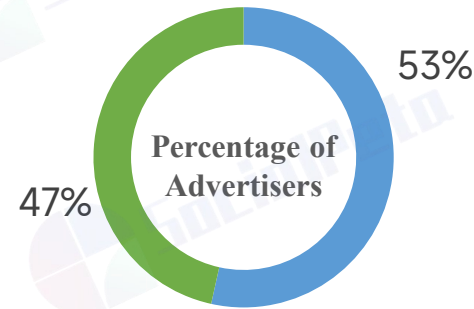
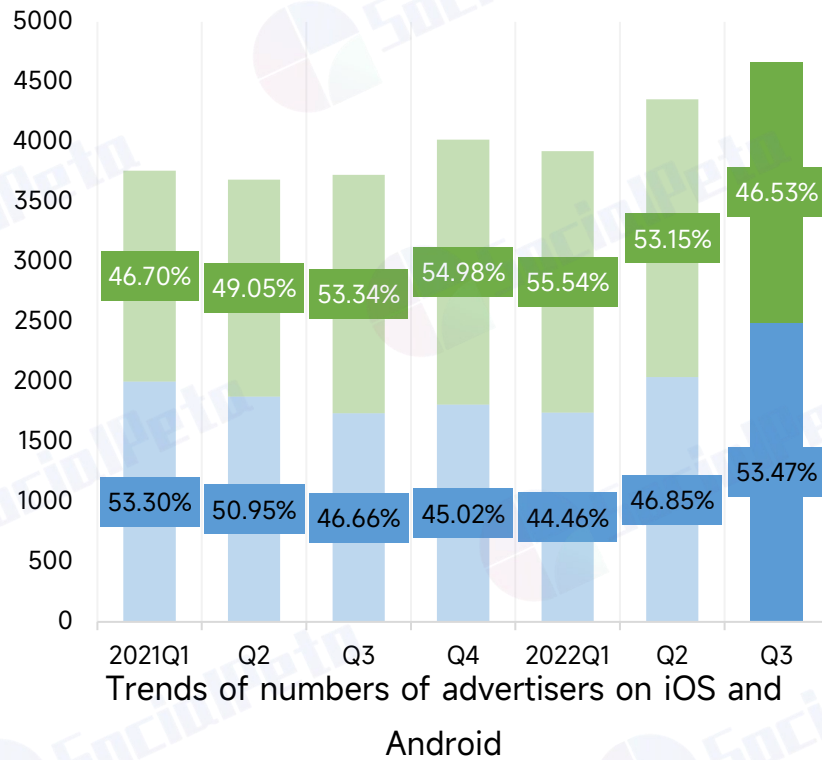


Insights into Simulation Games Marketing in Q3

Insights into Simulation Game Advertising

In Q3, there were over 4600 simulation game advertisers. More advertisers chose to advertise on iOS. Android accounts for more of ad creatives.

In Q3, the total number of simulation game advertisers **increased by 25.2% YoY, which was a QoQ growth of 7.2%**. There were 321 average creatives on Android, 15.1% higher than that on iOS.



Android

321

Average creatives

iOS

279

Average creatives

[Top 10] Media Buying for Simulation Mobile Games in Q3



| | | | |
|----|--|---|--------------------------|
| 1 | | Township Playrix | Farm Simulation |
| 2 | | The Ants StarUnion | Ant SLG |
| 3 | | Fishdom Playrix | Match-3 |
| 4 | | 歡樂大東家 EWORLD | Business Simulation |
| 5 | | Purrfect Tale DH Games | Idle Simulation |
| 6 | | Resortopia DH Games | Idle Business Simulation |
| 7 | | Last Fortress IM30 | Apocalyptic SLG |
| 8 | | 富甲江戶城 Yogame | Business Simulation |
| 9 | | animal restaurant DH Games | Idle Business Simulation |
| 10 | | Legend of the Phoenix Modo Global | Palace |

| | | | |
|----|--|--|--------------------------|
| 1 | | Travel Center Tycoon SONOW | Idle Business Simulation |
| 2 | | 富甲江戶城 Yogame | Business Simulation |
| 3 | | Chapters Crazy Maple Studio | Interactive Novel |
| 4 | | Legend City 悦动互娱 | Business Simulation |
| 5 | | 歡樂大東家 EWORLD | Business Simulation |
| 6 | | House Renovation Master Rollic Games | Hyper-Casual |
| 7 | | Merge Dream Mansion: Renovate Bianfeng Games | Matching |
| 8 | | Family Farm Adventure Century Games | Farm Simulation |
| 9 | | Refantasia Oasis Games | Palace |
| 10 | | Office Fever Rollic Games | Business Simulation |

Business Simulation Games is competitive with media buying

In Q3, Playrix's [Township] and SONOW's [Travel Center Tycoon] advertised the most creatives on IOS and Android respectively. The former advertised more than 3800 creatives on IOS, while the latter advertised over 10,000 creatives on Android.

On the Android chart, three games were released by DHgames. They are all addressed to provide a cure and have an animal element.

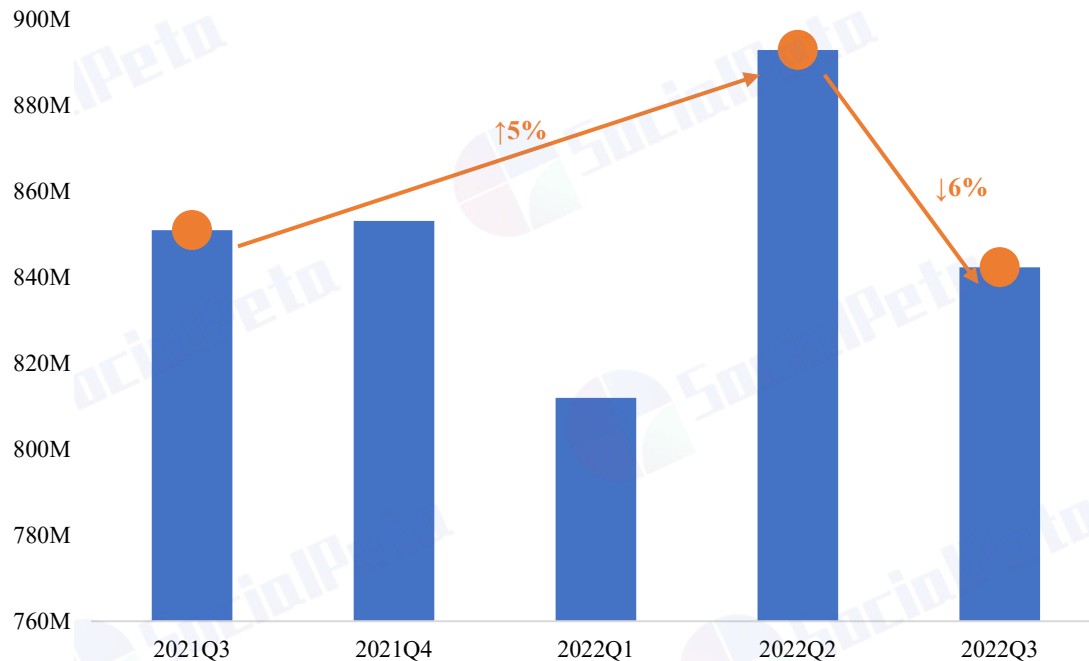
Overall, business simulation games occupied many spots on the charts, and most of them were owned by Chinese mobile game companies. There was very intense competition among top games.

Insights into Simulation Mobile Game Marketing

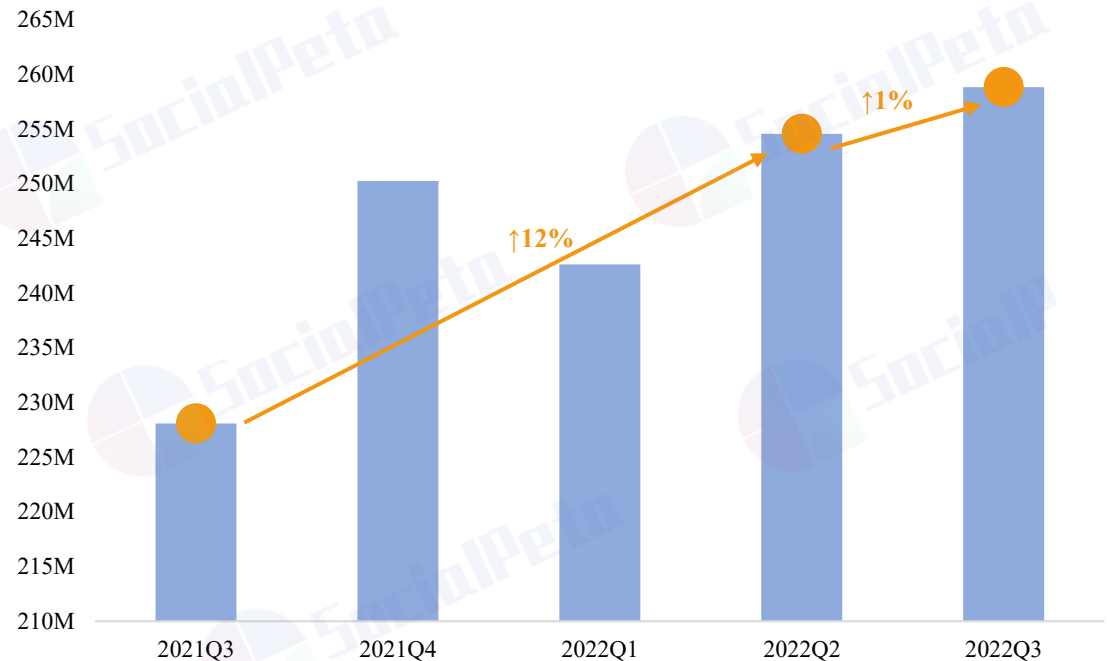
Simulation games: High-value users and high customer loyalty

Simulation games grew rapidly during the Covid-19 pandemic. It has reached to **over 250 million players across the world, and the number is still growing**. We expect a hard time for newbies since OGs are sharing the most of the market. Currently the most active games are [**Dessert DIY**] and [**Craftsman: Building Craft**], each with over 5 million DAUs in Q3.

Trends of downloads of simulation games



Trends of DAUs of simulation games

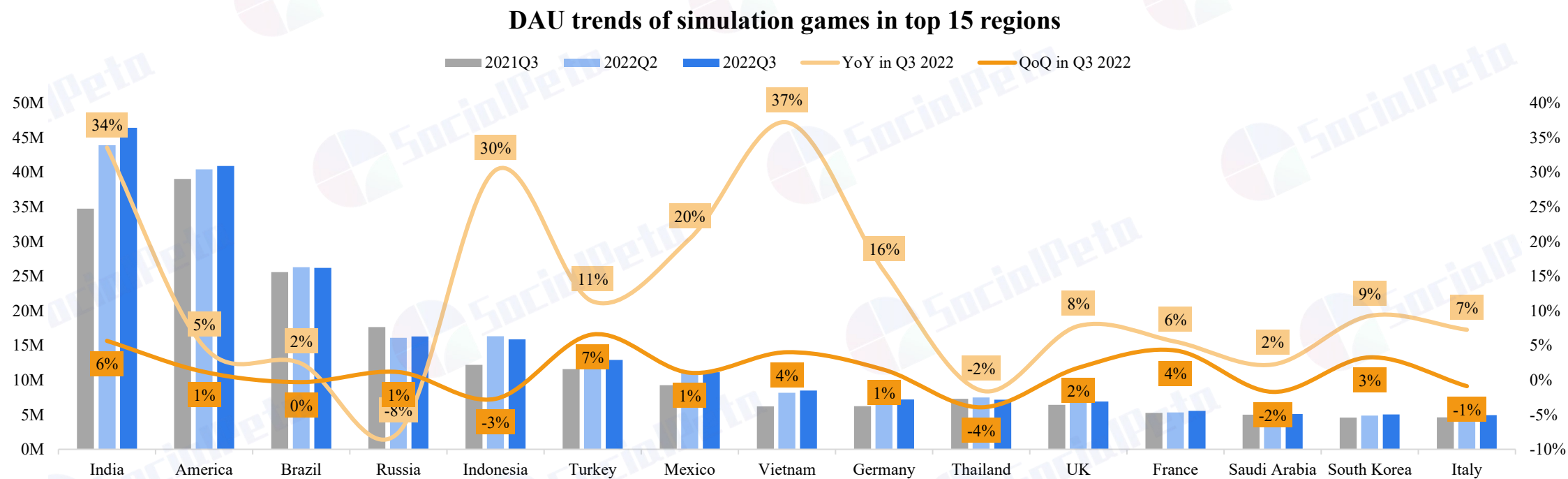


Insights into Simulation Mobile Game Marketing

Simulation games were more popular in less-developed regions

In Q3, Indian simulation games continued to grow rapidly by 34% YoY.

Overall, simulation games will mainly focus on India, Indonesia, Mexico, Vietnam, and other less-developed regions.

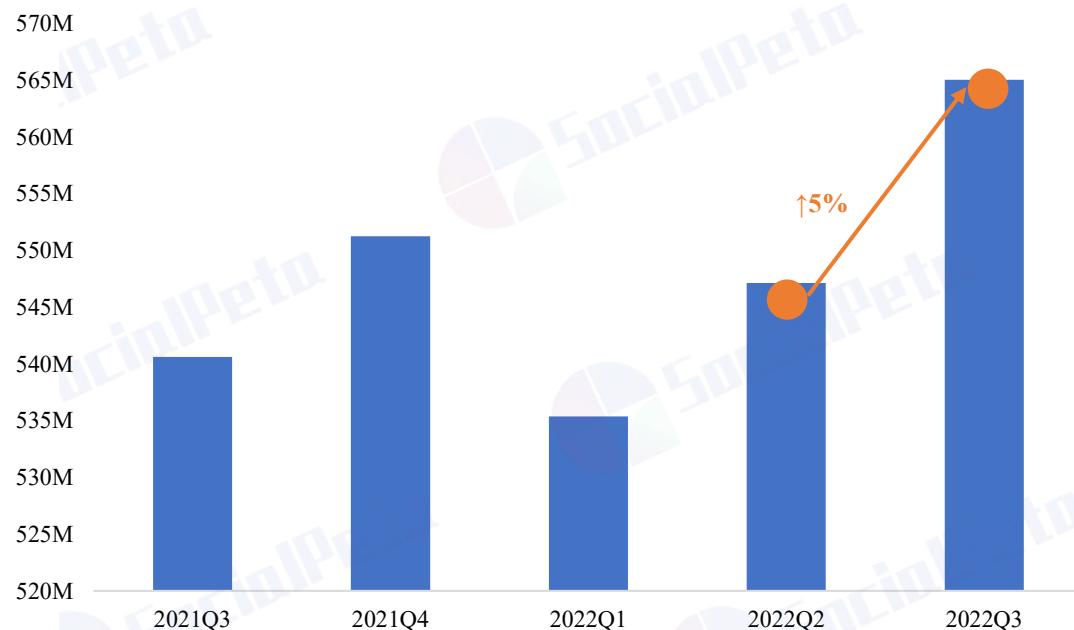


Insights into Simulation Mobile Game Marketing

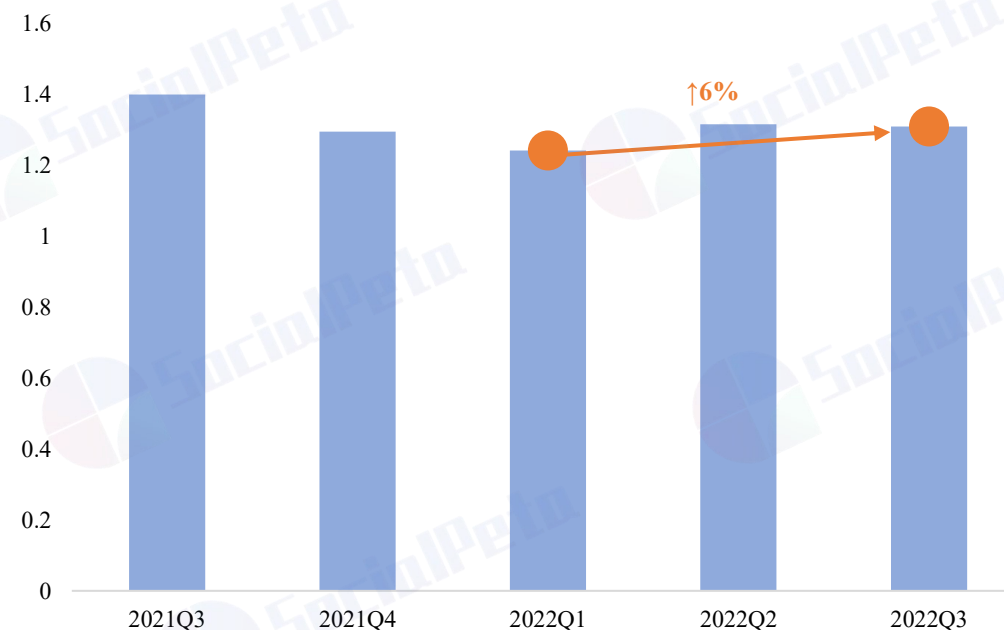
Revenue remained stable with a slightly growth

Compared to Q2 2022, simulation games reported a total revenue of \$17 million in Q3 with a slightly growth of 5%. The revenue was mainly contributed by Japan and South Korea. For example, [ウマ娘 プリティーダービー], [ドラゴンクエストタクト], and [우마무스메 프리티 더 비]. The revenue generated by the three games in Japan and South Korea accounted for 21% of total global revenue.

IAP (unit: \$) trends of simulation games



ARPU (unit: \$) trends of simulation games



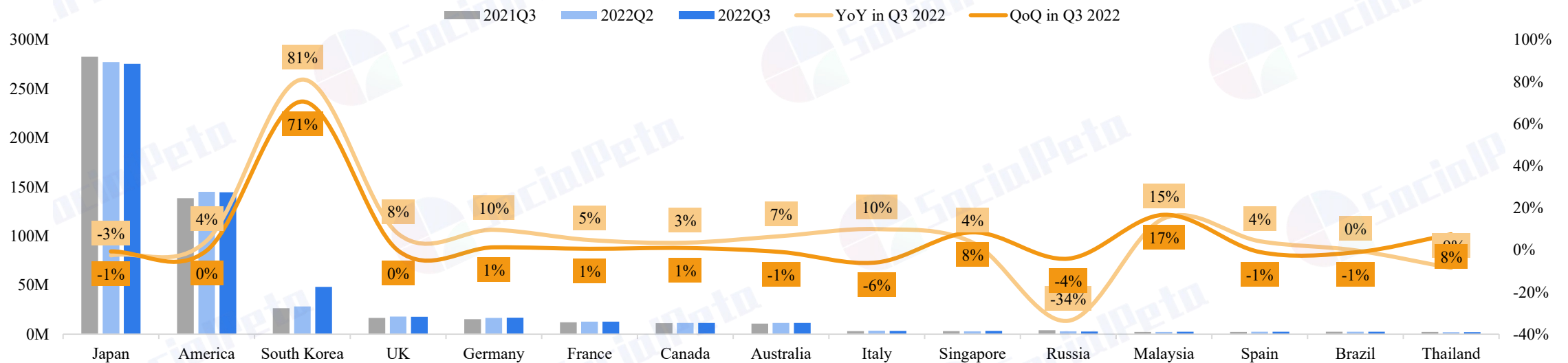
Insights into Simulation Mobile Game Marketing



The revenue in Japan and America was way more higher than that in other regions. The growth in South Korea was the most notable.

According to the revenue chart, **Japan and America own the biggest market share, but they found difficult to have another surge in revenue growth.** The top one grossing simulation game in Japan was [ウマ娘 プリティーダービー], with a revenue far higher than the second grossing game. The most grossing game in America was [Design Home]. South Korea had a rapid growth during Q2-Q3. South Korean market grew by over 70% which was mainly contributed by a mobile game named [우마무스메 프리티 더비].

IAP (unit: \$) trends of simulation games in Top 15 regions



Popular Simulation Mobile Game Advertisers



歡樂大東家

EWORLD

[歡樂大東家], a business simulation game developed by EWORLD, kept a very stable revenue in Hong Kong, Macao and Taiwan regions. **It is an ever-green on the chart of the top 10 best-selling simulation games on the App Store in China's Hong Kong, Macao and Taiwan regions.**

[歡樂大東家] was released in July 2021. The game's major marketing strategy is to collaborate with IPs that are matched with the its style. In September this year, [歡樂大東家] **established a time-limited collaboration with the classic IP in Taiwan “金光布袋戏”**, adding classic characters “史豔文”, “藏鏡人” and “黑白郎君” into the game " to attract players' attention.

450+

Days of Duration

11.6K

Deduplicated
Creatives on iOS

16.1K

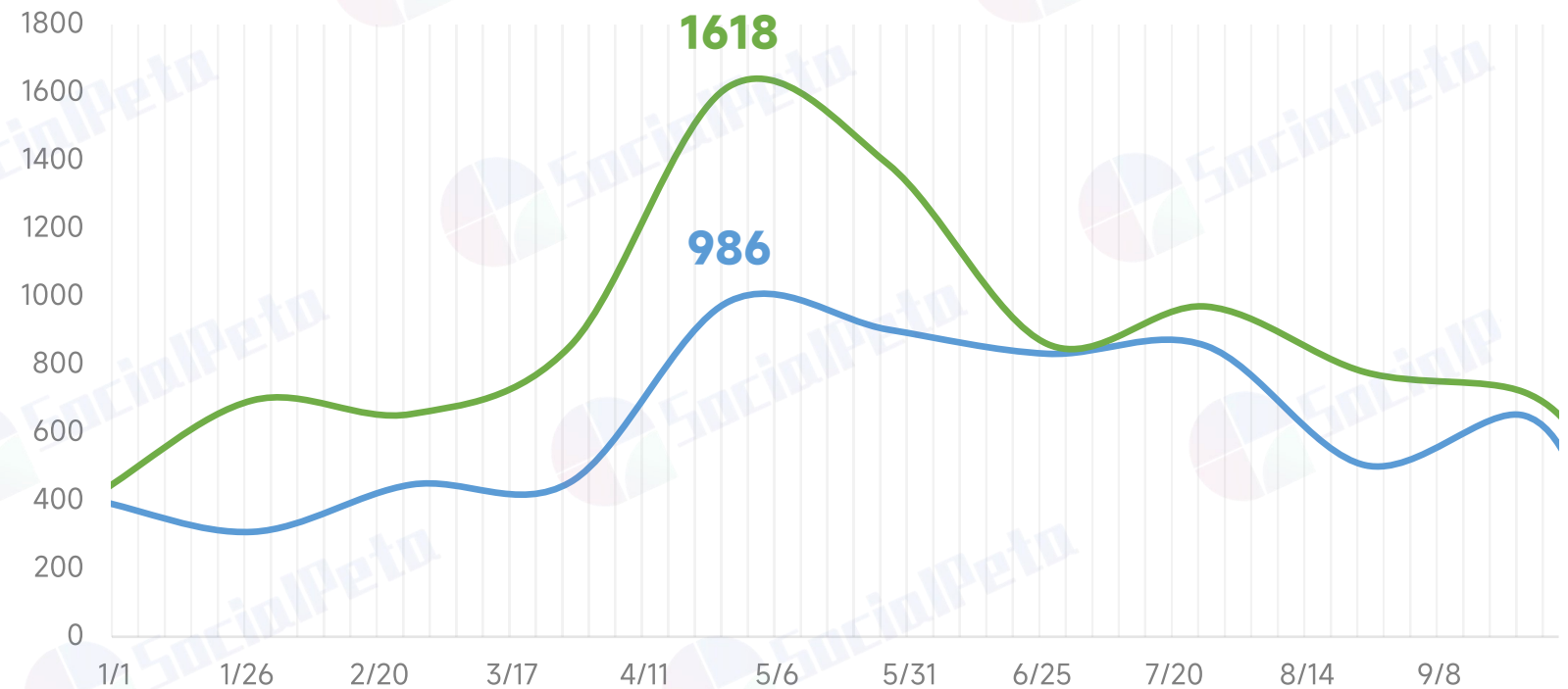
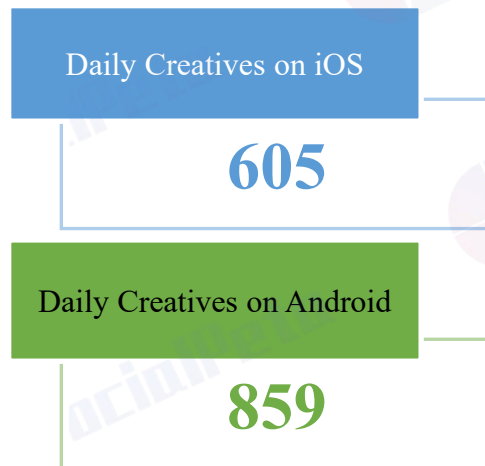
Deduplicated Creatives
on Android

Insights into [歡樂大東家]'s Global Advertising strategy

Advertise more creatives on Android than on IOS by 42%

The game mainly advertised creatives on Android, with 859 creatives daily; they spent more on media buying on Android between April-May, **peaking at over 1600 daily creatives**

It advertised 605 creatives daily on iOS. The overall trend was relatively stable. The peak emerged in April-July with **nearly 1000 daily creatives**.

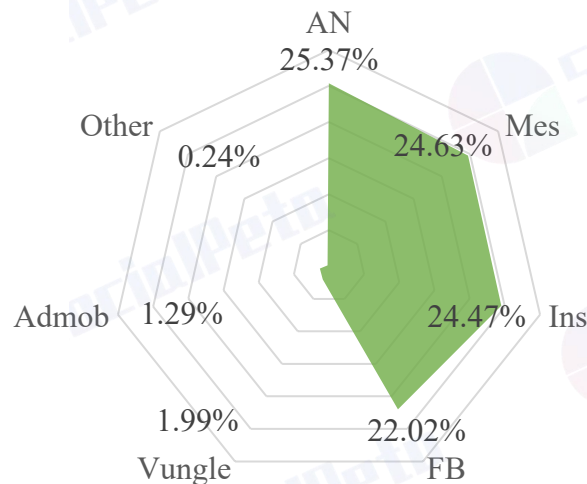


Analysis of [歡樂大東家]’s Android Advertising

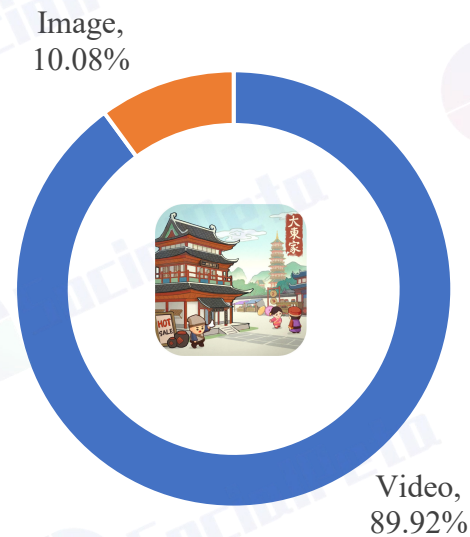
The game mainly released its creatives in **Hong Kong, Macao and Taiwan** and **Malaysia**. Creatives on **AdMob** accounted for **nearly 20%**.

Its creatives were mainly released on the Audience Network **which accounted for nearly 20%**. **Video creatives contributed for 89.92% of its total creatives**. Taiwan was their main target followed by Japan. They advertised more creatives in Taiwan, 21% more than Japan.

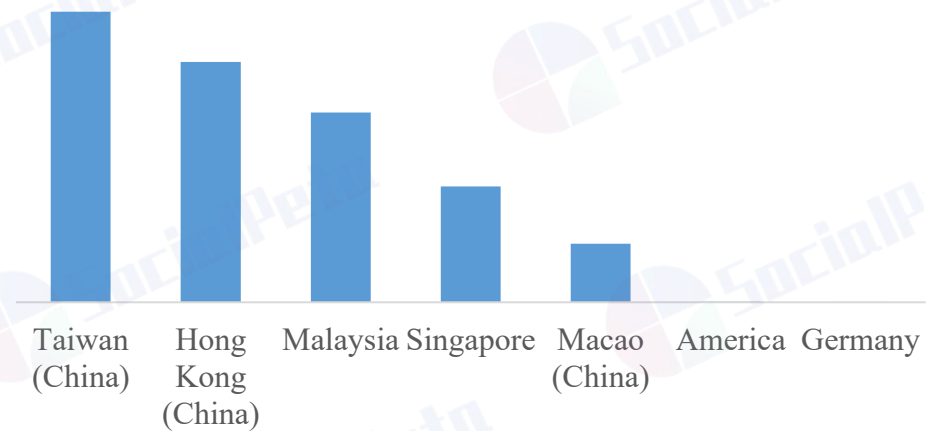
Advertising Platform



Type of Creative



Top Counties/Regions by Advertising



[歡樂大東家]'s Popular Creative in Q3

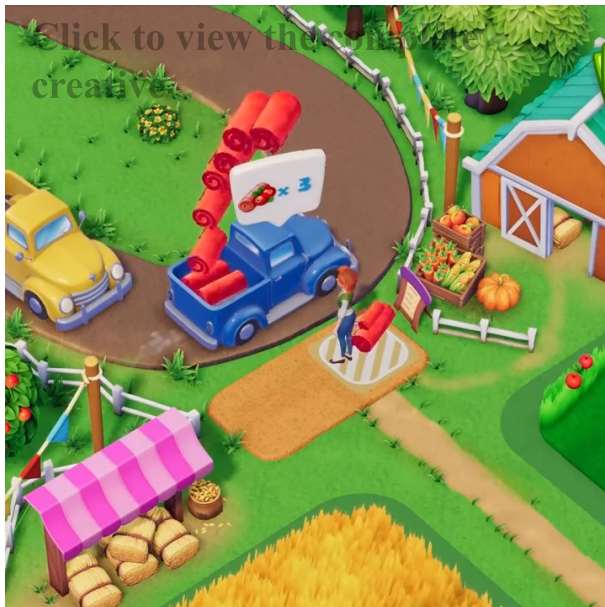
Character remake of influencers; fit them into popular casual games



Analysis of Popular Creatives for Simulation Games

Simulation games **focus more on feedback**, highlight with **level-ups, success, and failure**.

Satisfy people with OCD




Represent real-world drama



Reflect odd occasion in real life



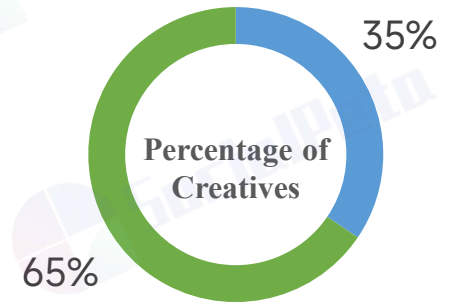
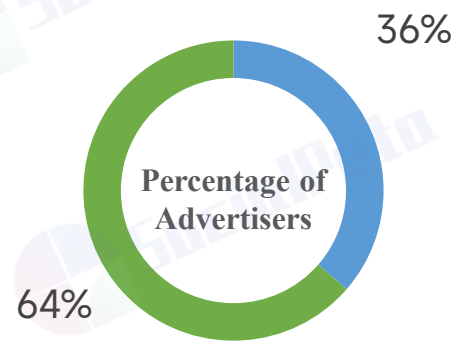
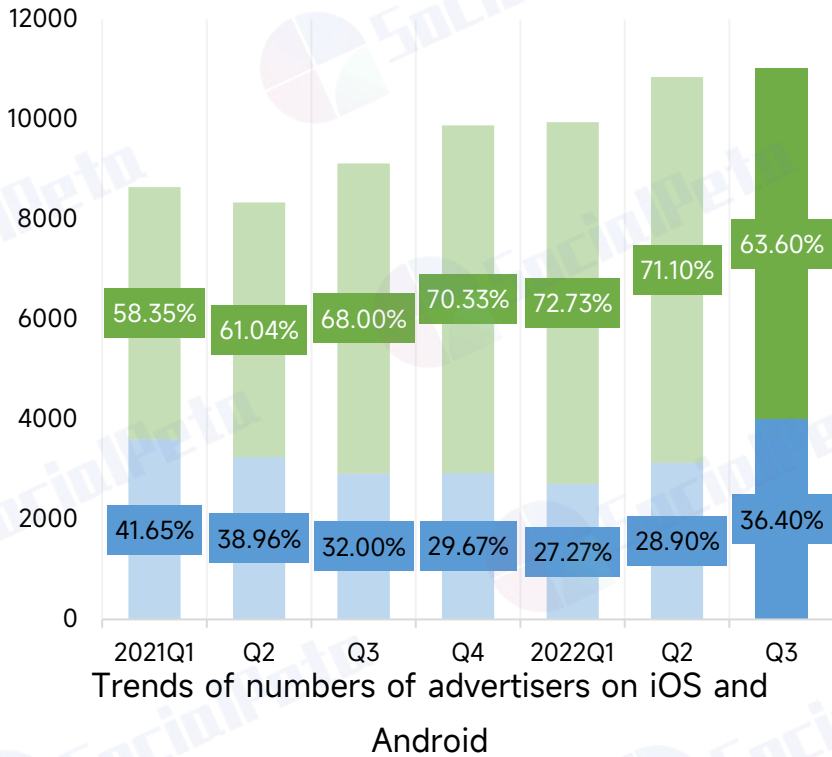


Insights into Casual Mobile Games Marketing in Q3

Insights into Casual Mobile Game Advertising

In Q3, there were over 11,000 casual game advertisers, to which, Android contributed twice as many advertisers as iOS.

In Q3, the total number of casual game advertisers increased by 23.02% YoY, which was a QoQ growth of 1.94%. There were 263 average creatives on Android, 8.7% higher than that on iOS.



263
Average creatives in Q3 2022

242
Average creatives in Q3 2022

Top 10 Casual Mobile Games by Advertising in Q3



| iOS | | |
|-----|--------------------------------------|--------------------------|
| 1 | Block Puzzle Doodle Mobile | Matching |
| 2 | Sniper 3D Wildlife Studios | Shooter |
| 3 | 1945 ONESOFT | Shooter |
| 4 | Purrfect Tale DH Games | Simulation |
| 5 | Resortopia DH Games | Idle Business Simulation |
| 6 | Define Lemellabs | Spot Difference |
| 7 | Dream Piano Eyugame | Music |
| 8 | animal restaurant DH Games | Idle Business Simulation |
| 9 | Survivor.io Habby | Roguelike Shooter |
| 10 | Find Out Eyewind | Hyper-Casual |

| Android | | |
|---------|---|--------------|
| 1 | Sweet Color Tapque Software | Coloring |
| 2 | Crowd Evolution! Rollic Games | Hyper-Casual |
| 3 | Bump Pop Rollic Games | Hyper-Casual |
| 4 | Car Fix Tycoon SONOW | Idle |
| 5 | Hoard Master Rollic Games | Hyper-Casual |
| 6 | Bubble Burst PoseidonJoy | Matching |
| 7 | Ground Digger Homa Games | Hyper-Casual |
| 8 | Ball Sort IEC | Puzzle |
| 9 | 1945 ONESOFT | Shooter |
| 10 | Tower Color Homa Games | Hyper-Casual |

Industrial Output + Short Video Creatives

[Sweet Color], a coloring puzzle game of Tapque Software, had the highest deduplicated creatives among all casual game advertisers in Q3. Most of the game's creatives were released in America, accounting for as high as 97%. It had nearly 15,000 deduplicated creatives on the App Store and Google Play combined.

[Purrfect Tale] and other cute business simulation games of DHGames, as well as a series of action hyper-casual games of Rollic Games, adopted the creative pattern of sophisticated industrial capacity and typical short videos to become hit games cost-effectively.

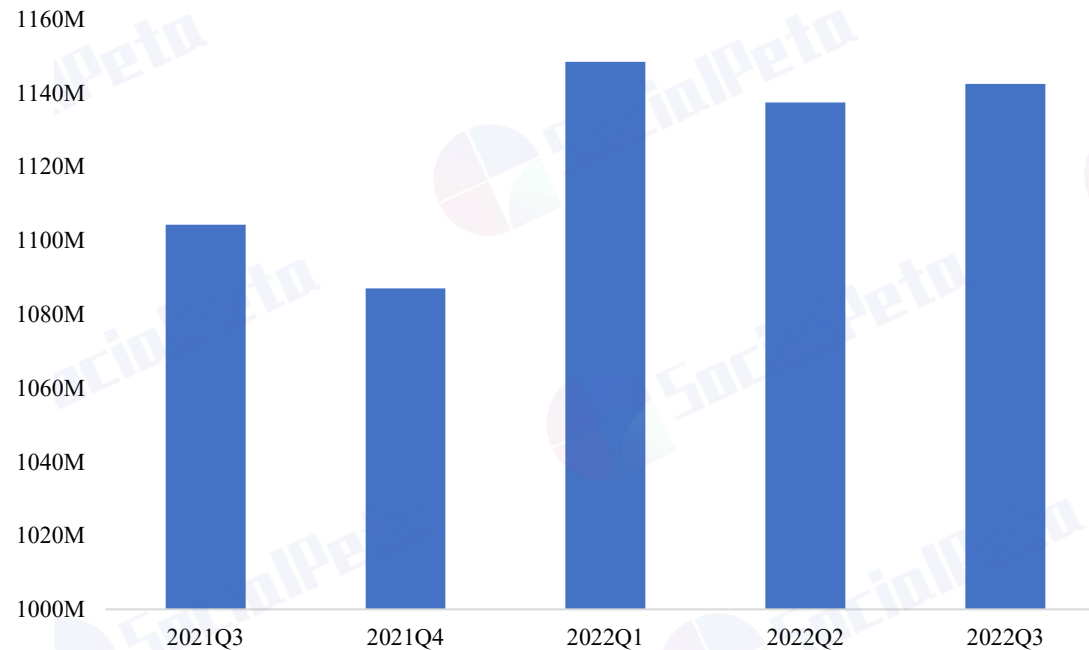
Insights into Casual Mobile Game Marketing

Casual games had an overall steady performance in Q3

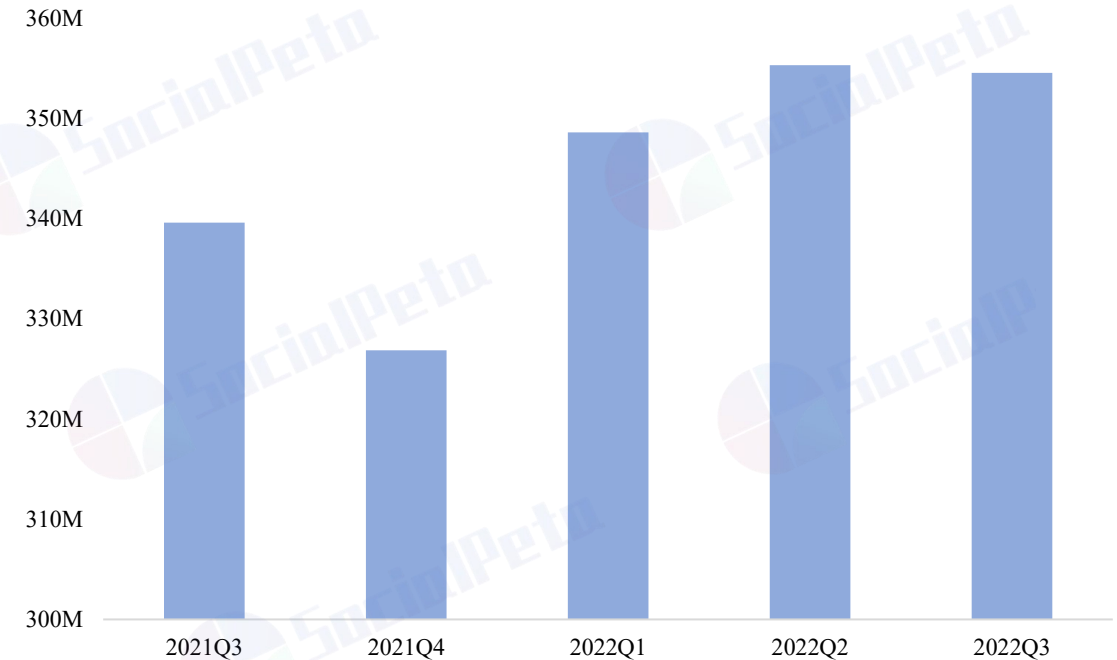
Compared to Q2, **downloads of casual games increased by over 5 million in Q3**, which, however, was a less than 1% increase.

DAUs were relatively steady, compared to the end of last year when many users were lost.

Downloads trends of casual games



DAU trends of casual games



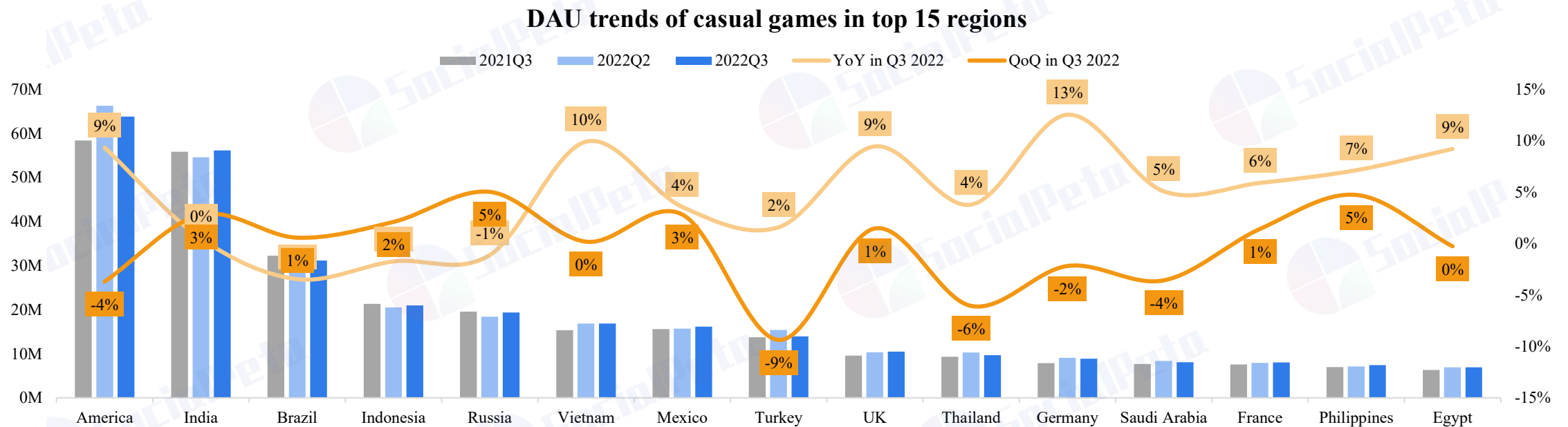
Insights into Casual Mobile Game Marketing



Casual games had big growths in less-developed regions

By comparing user scales in Q3, we can see that **most of the casual games' users were from less-developed regions including India, Brazil, and Indonesia.**

In the long run, casual games are expected to have better performance in less-developed regions than in developed regions, such as Vietnam, Mexico, Philippines, Egypt, etc.

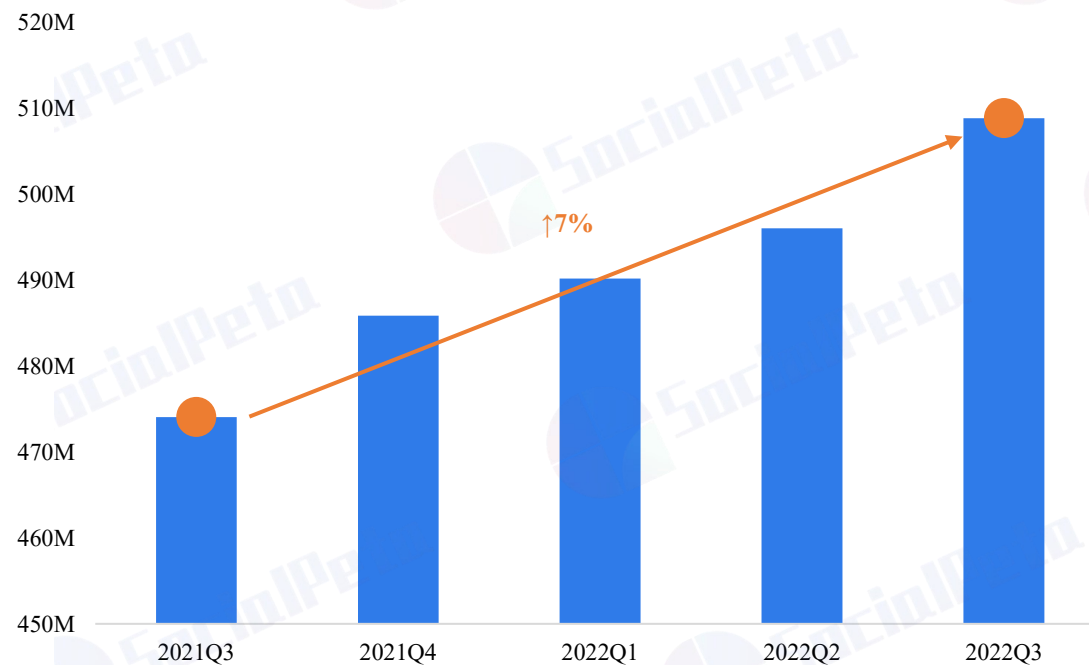


Insights into Casual Mobile Game Marketing

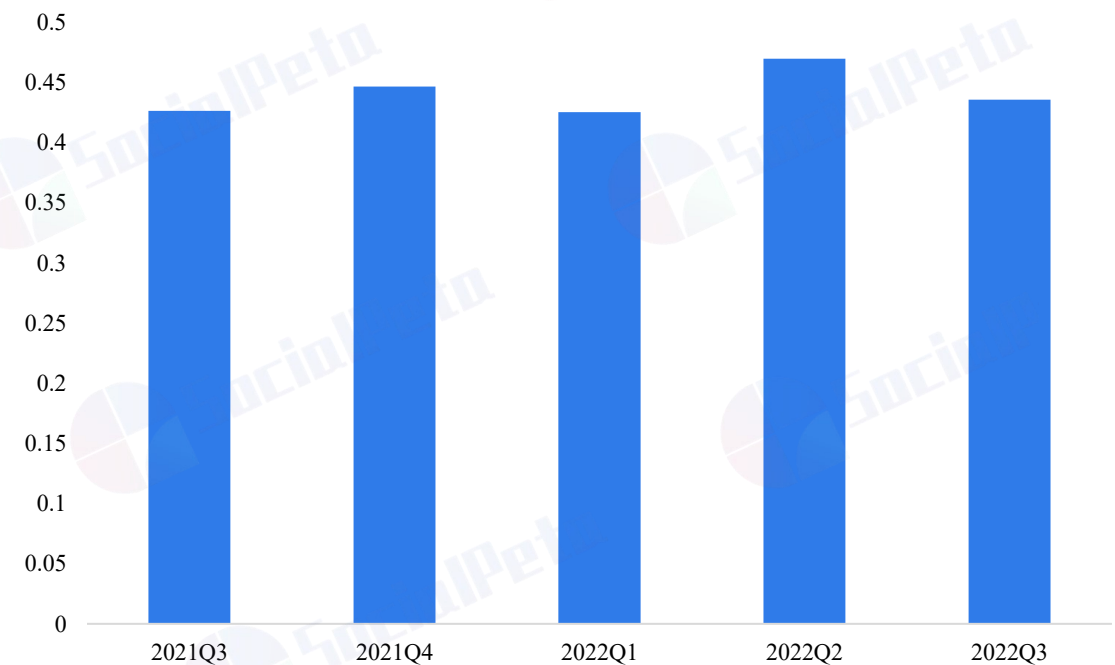
Casual games had an impressive growth in revenue

Casual games' revenue increased by 7% YoY in Q3, with incremental growth of over \$30 million. Top mobile games were mostly old games with the majority of their revenue generated in America, such as [Stumble Guys] and [Township]. In Japan, the recently released new game [BTS Island: In the SEOM] saw exceptional revenue growth.

IAP (unit: \$) trends of casual games



ARPU (unit: \$) trends of casual games



Insights into Casual Mobile Game Marketing

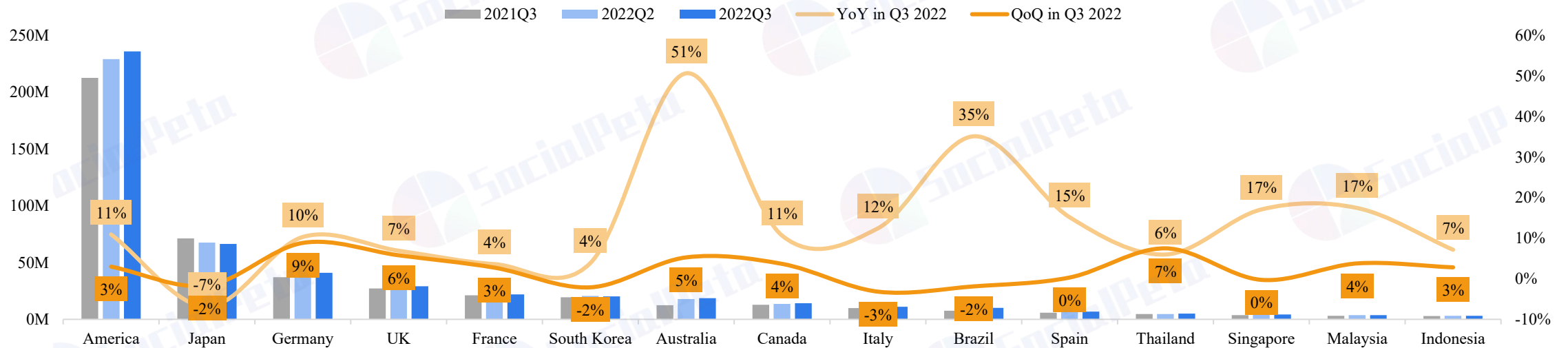


Europe, America, Southeast Asia and Latin America are the main regions for revenue growth

In Q3, casual games generated the most revenue in America, with a YoY growth of 11% and a revenue of over \$250 million accounting for 46% of the total revenue, which was 3.5 times that in the No.2 region (Japan).

America and European countries (Germany, The UK, etc.) remained a fast revenue growth. Those countries were the major revenue source for casual games that profit from IAP or in a mixed way. In addition, South-East Asia countries (Singapore, Malaysia, etc.) and some Latin American countries (Brazil) saw a higher revenue growth than European and American regions.

IAP (unit: \$) trends of casual games in Top 15 regions



Popular Casual Mobile Game Advertisers



Survivor.io

Habby

[Survivor.io] is a cartoon-style [casual Roguelike mobile game](#). The game was released for iOS in September 2020, while it was released for Android in July this year and topped the top 15 global versions of Chinese games by revenue in August. With its elaborative advertising strategy and solid Roguelike gameplay, the game topped the three charts by downloads, revenue, and advertising. It grossed a total of over \$30 million from the App Store and Google Play. It released about 163 creatives daily.

[Survivor.io] is the 4th hit game released by Habby. The game has completely broken the deadlock of weak IAP in casual games through a combination of high industrial capacity and a well-designed top-up system.

100+

Days of Duration

1.8K

Deduplicated
Creatives on iOS

6.4K

Deduplicated
Creatives on Android

Insights into [Survivor.io]' s Global Advertising



Advertising on the App Store and Google Play significantly increased after the game was released for Android users.

Advertisers primarily target the Android platform; the average daily volume of material for Android is approximately 4.2 times that of the iOS platform; the significant buying volume of Google Play and Apple Store began on August 5 and ushered in two rounds of a peak on August 26 and September 26 respectively, with the peak daily volume of material exceeding 2.5K articles, and the game received six updates throughout Q3.

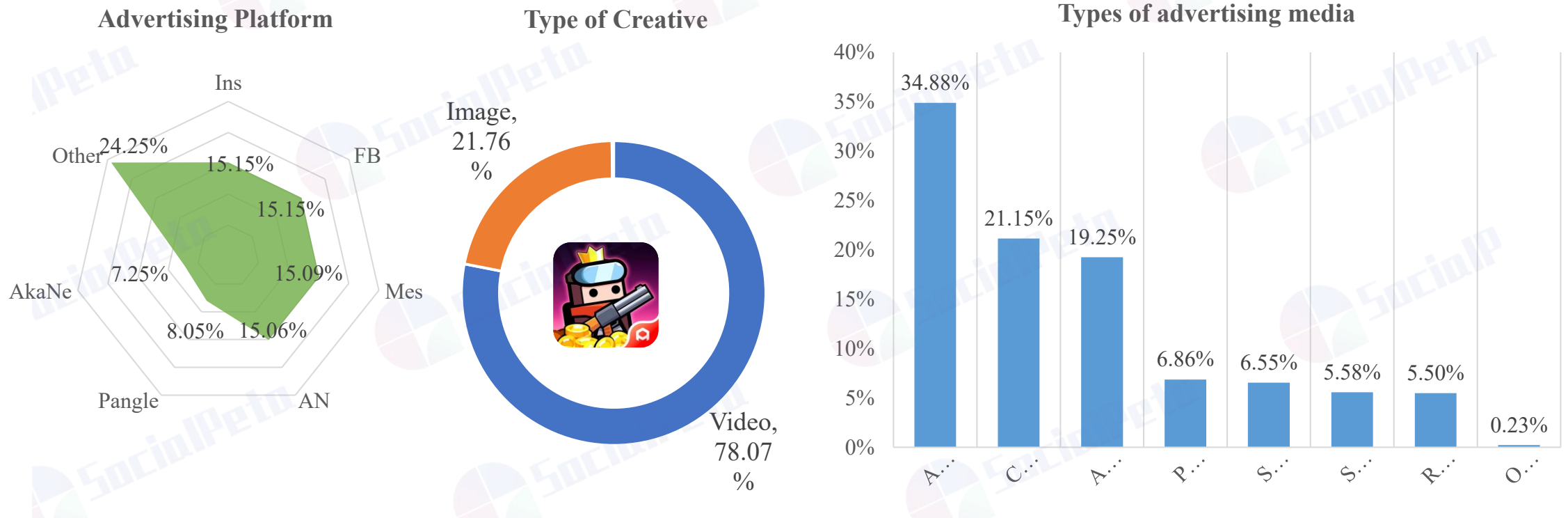


Analysis of [Survivor.io]'s Android Advertising

Over 60% of its ad-creatives were on META Platforms; action games have become the main media for its placement.

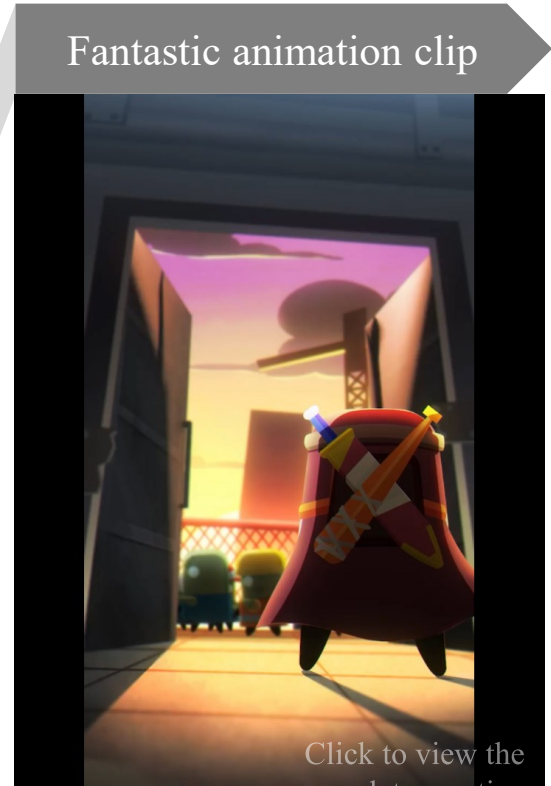
META Platforms were its main advertising platform where over 60% of its ad-creatives were released. Among those platforms, creatives on Instagram accounted for the highest percentage.

In terms of ad-creatives' formats, 78% of the game's creatives were video, and 33.88% of its creatives were released on action game media.



Analysis of [Survivor.io]'s Creatives in Q3

Roguelike and splendid bullet screen are the main elements;
Making own punchline, Marked with cannonball rotation

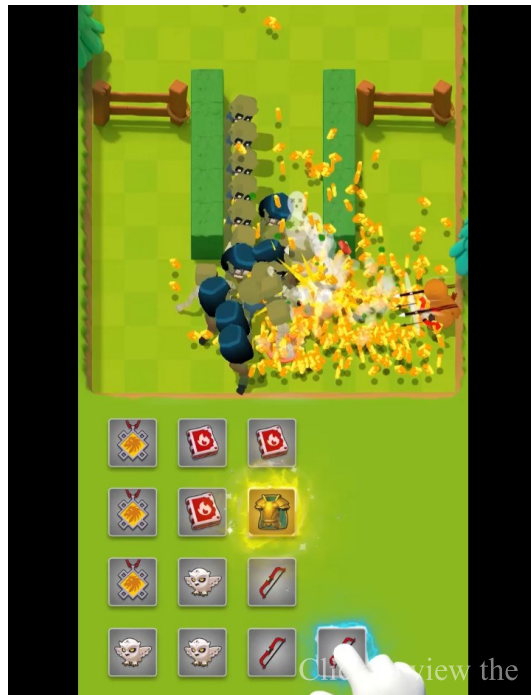


Habby's Other Popular Game Creatives

Quick mowing attracts the core audience; Hovering on the brink of failure is thrilling.



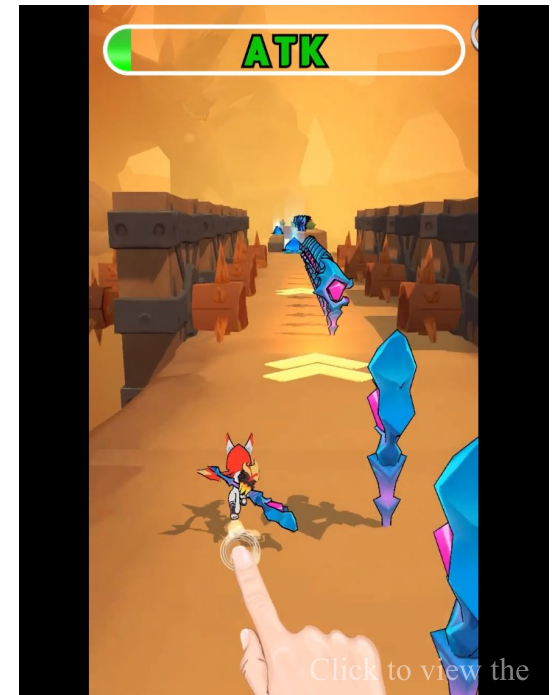
Win a hard game



Deliberate failure for a new start



Eating-no-coin Challenge

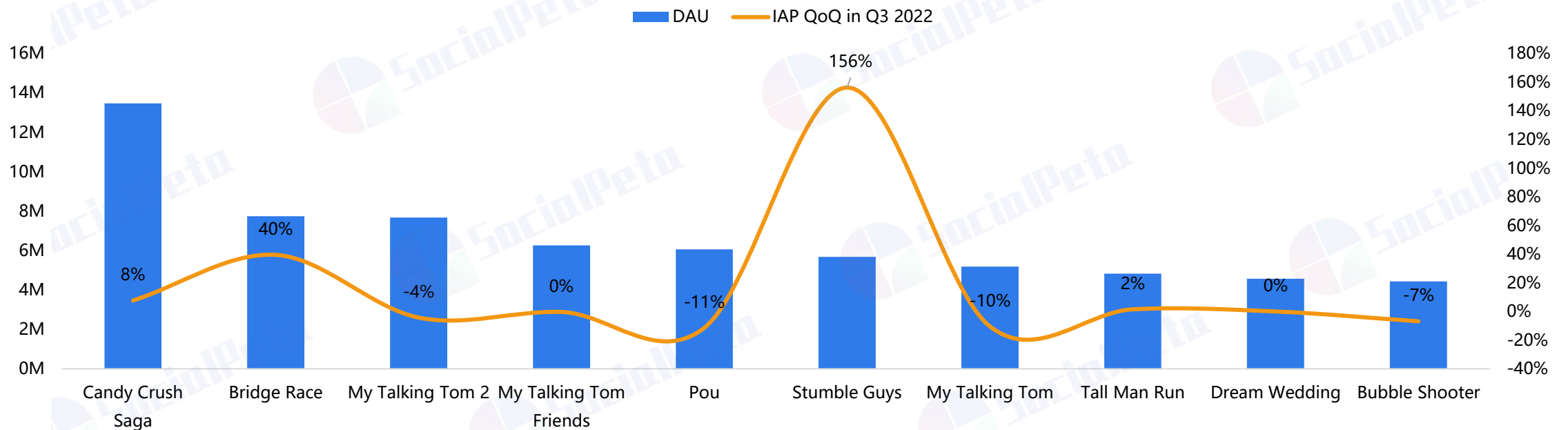


Insights into Casual Mobile Game Marketing

Old casual games had declined revenue

Except for [Dream Wedding] and [Tall Man Run], the top 10 global casual games by DAU in Q3 were all old games (games released before 2022), with 4 games reporting revenue declines. [Stumble Guys], which was released last year, had a rapid revenue growth of 156% QoQ in Q3 (mainly in late August and early September, may because of the new skins, emoji, and sound effects.)

Downloads and IAP trends of Top 10 casual games by DAU in Q3 2022



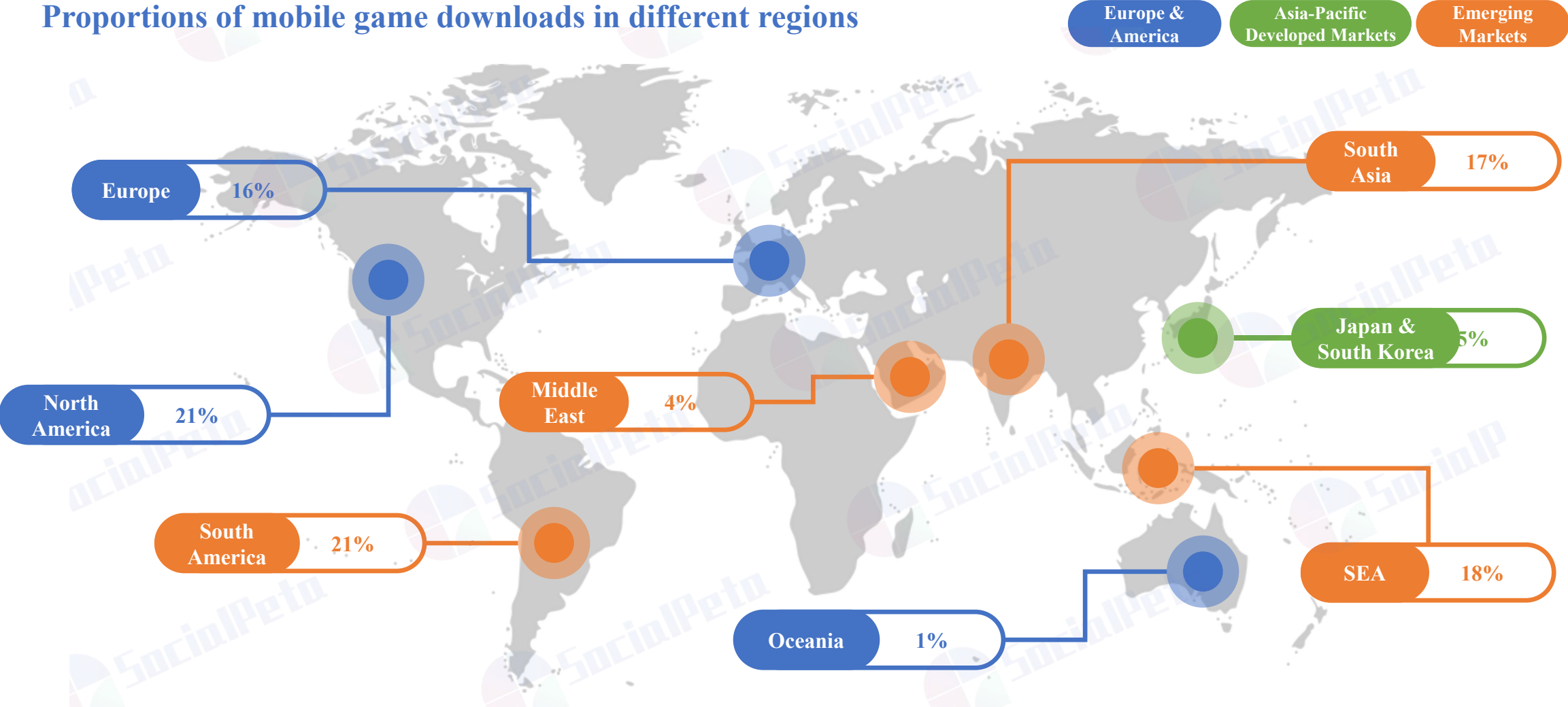


Insights on Mobile Game Marketing in Popular Countries/Regions

Global Mobile Game Marketing Insights in 2022



Proportions of mobile game downloads in different regions

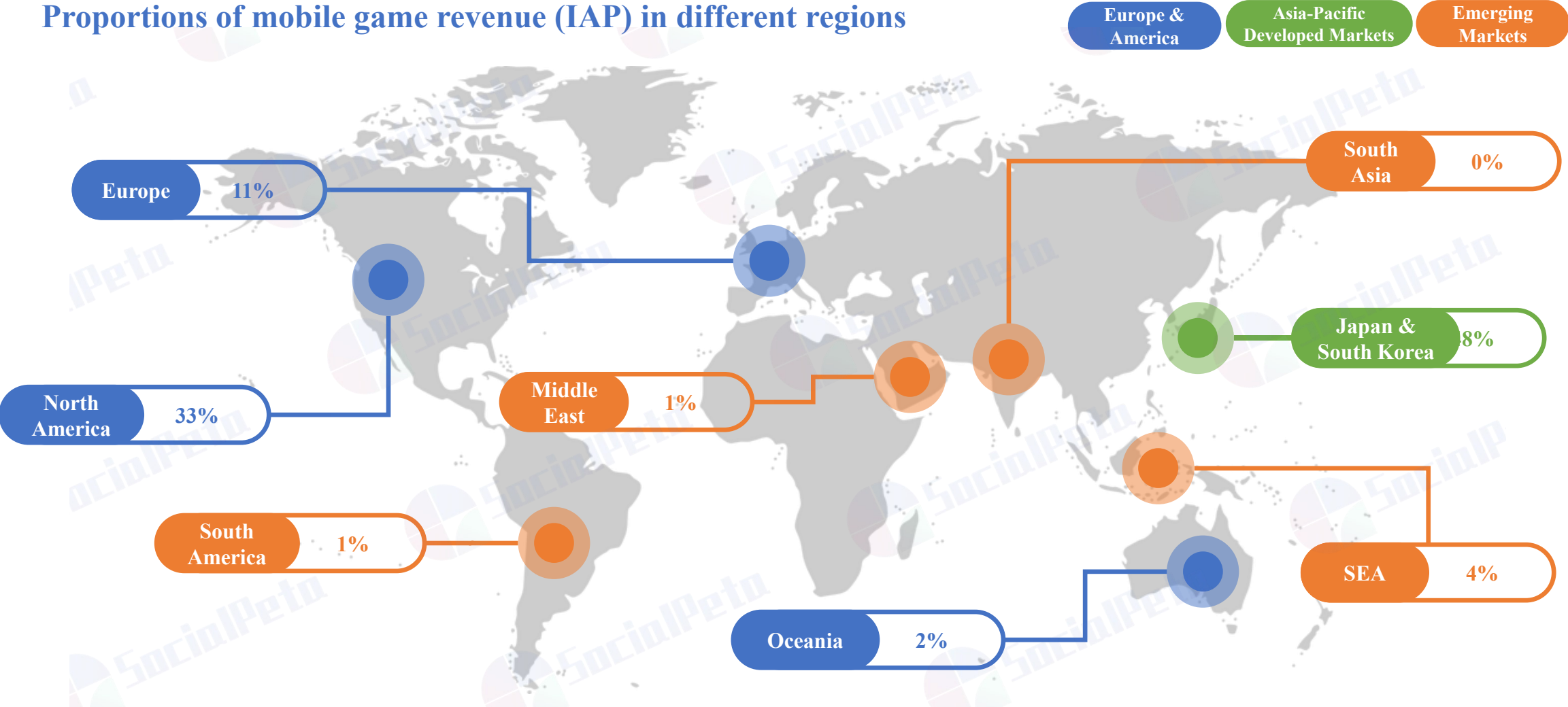


Source: OpenMediation, presented after sorting market data.
Date Range: 2022/7~2022/9

Global Mobile Game Marketing Insights in 2022



Proportions of mobile game revenue (IAP) in different regions



Source: OpenMediation, presented after sorting market data.
Date Range: 2022/7~2022/9

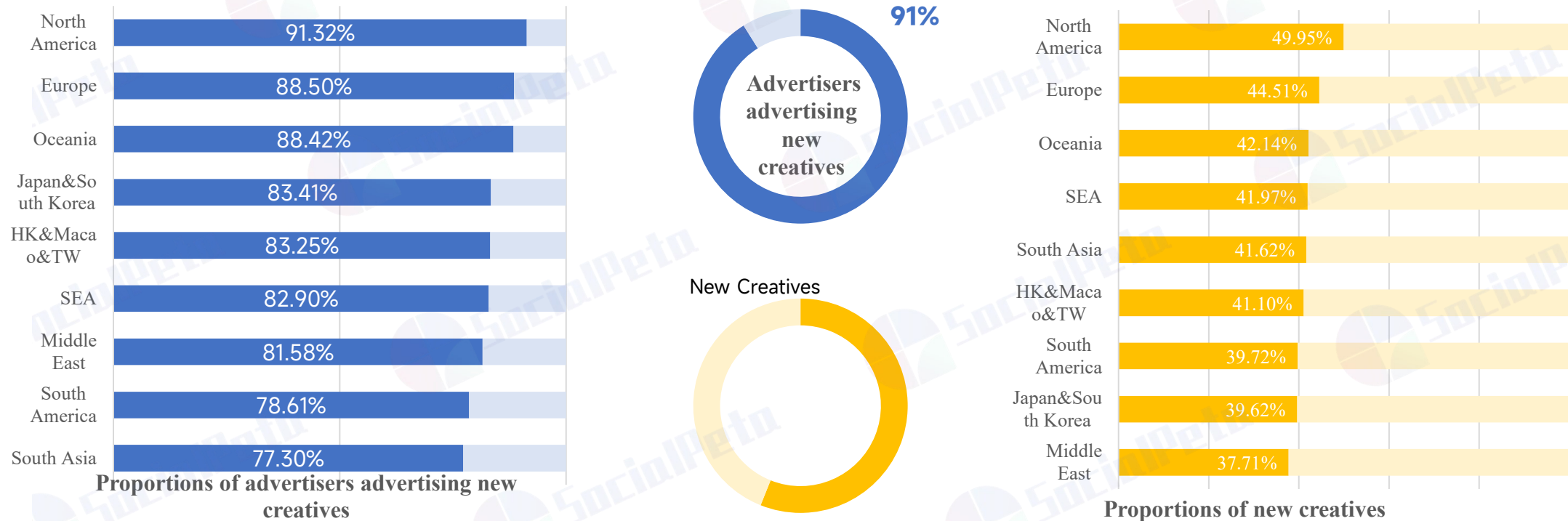
Global Mobile Game Marketing Insights in 2022



North America had the highest proportion of new creatives in Q3 the Middle East only accounted for 37%

Europe and American advertisers preferred new creatives. Advertisers who advertise new creatives accounted for 91% of North America, followed by Europe and Oceania.

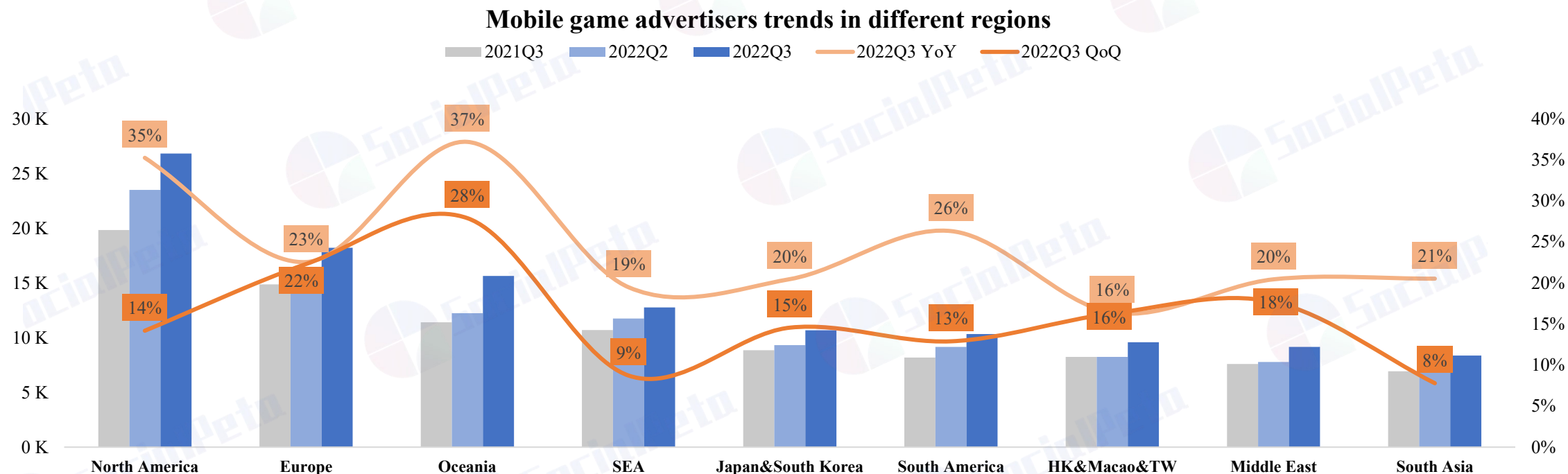
For proportions of new creatives in Q3, only South America, Japan & South Korea and the Middle East were less than 40%, with the lowest proportion in the Middle East, 37.71%



Global Mobile Game Marketing Insights in 2022

Advertisers in all popular regions showed growth in Q3, with Oceania achieving the largest increase

In Q3, advertisers from all over the world were on different growth momentum, among which **Oceania and North America** increased by over **35% YoY**. North America has the most mobile game advertisers, **over 25,000 in Q3**, 47.3% higher than Europe, the second place.



Global Mobile Game Marketing Insights in 2022

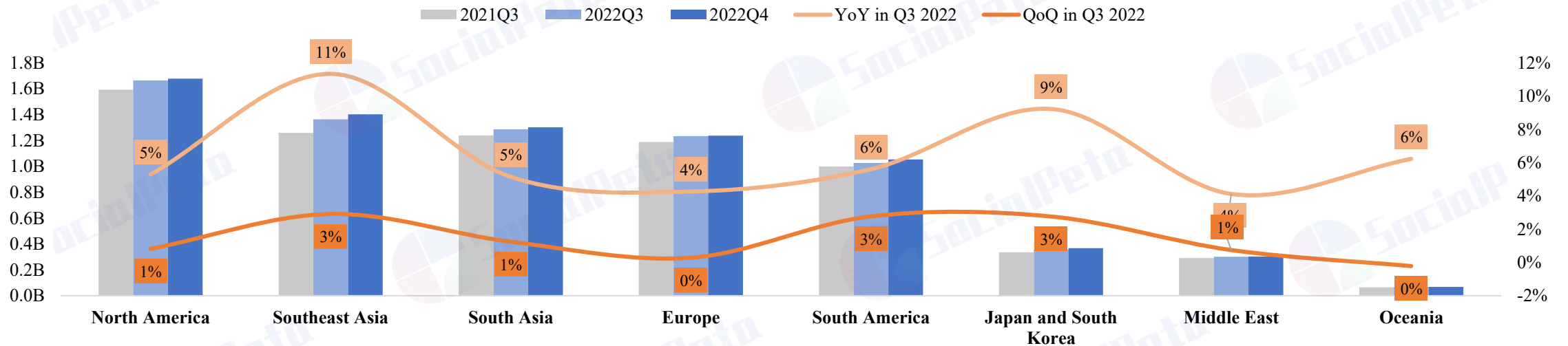


Mobile traffic grew rapidly in SEA in Q3

North America is the largest traffic source of mobile games in the world. As the birthplace of mobile games, North America maintained a steady growth in downloads, with a YoY growth of 5% and a QoQ growth of 1% in Q3.

SEA has the second-highest mobile game downloads, next to North America. It was the fastest-growing market in Q3, with a YoY growth of 11%.

Download trends of global mobile game (by regions)

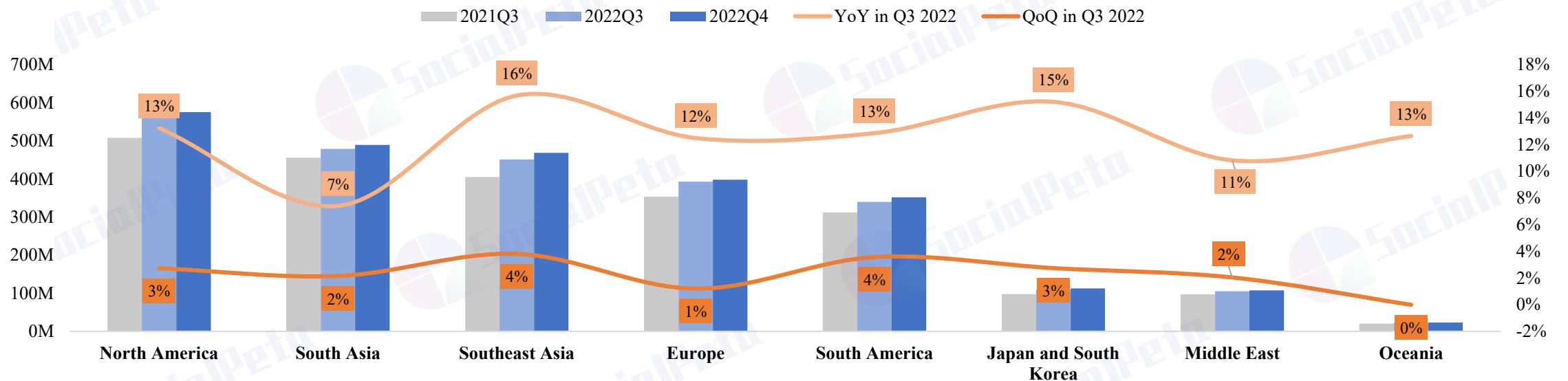


Insights on 2022 Global Mobile Game Marketing

DAUs in SEA, North America and Japan & South Korea grew rapidly

On top of its fast DAU growth in Q2 (10% QoQ), the North America market achieved a 13% DAU growth YoY in Q3. North America is the fastest-recovering market of mobile games this year. Compared to the same period last year, SEA and Japan & South Korea achieved the highest growth, realizing a 16% and 15% growth in Q3 respectively.

Trend chart of global mobile game DAUs (sorted by regions)





Insights on Q3 Mobile Game Marketing in North America

Insights on Q3 Mobile Game Advertising in the USA



90% of advertisers released new ads, with nearly 50% of new creatives

As the second largest market of mobile games in the world, advertisers in the USA competed fiercely. Only 9% of advertisers didn't release new creatives. Generally, advertisers in the USA region update creatives more frequently

Advertisers releasing new creatives

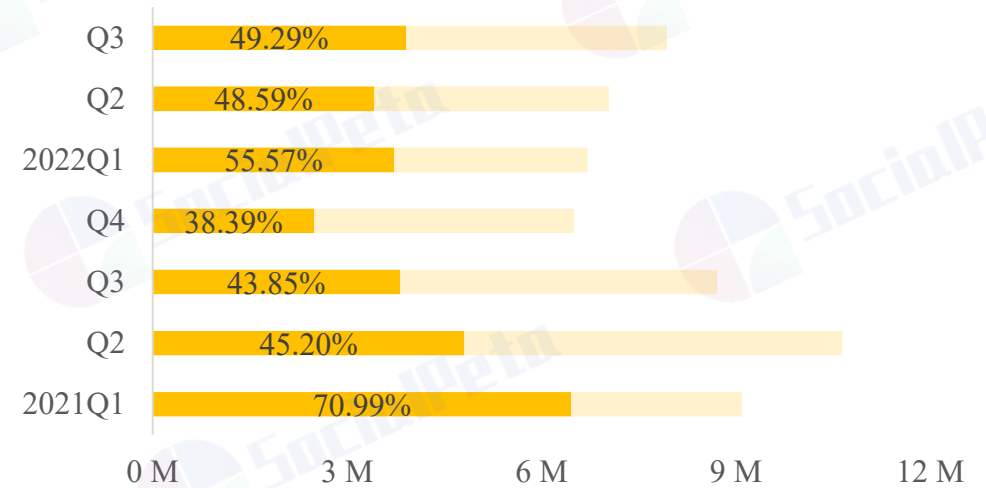
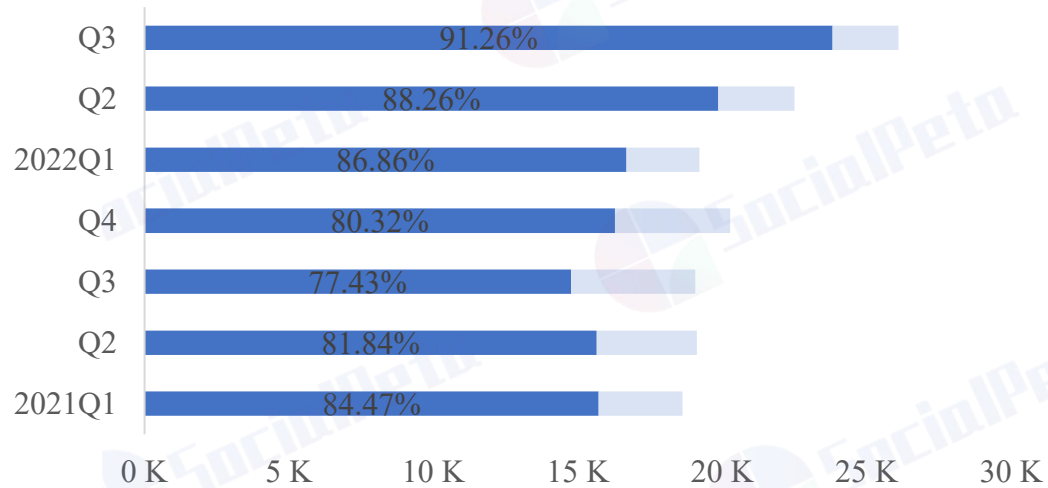
90% of advertisers released new ads. The competition in the USA remains fierce

23.8K 91%

New creatives

The update frequency of creatives remained stable compared with Q2, but it grew significantly compared with 2021Q3

3.9M 49%



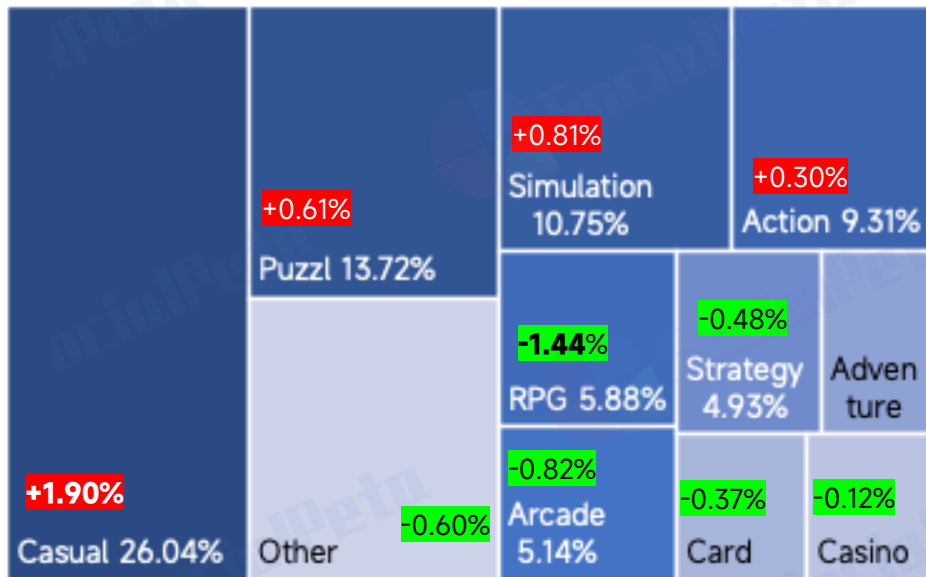
Insights on Q3 Mobile Game Advertising in the USA



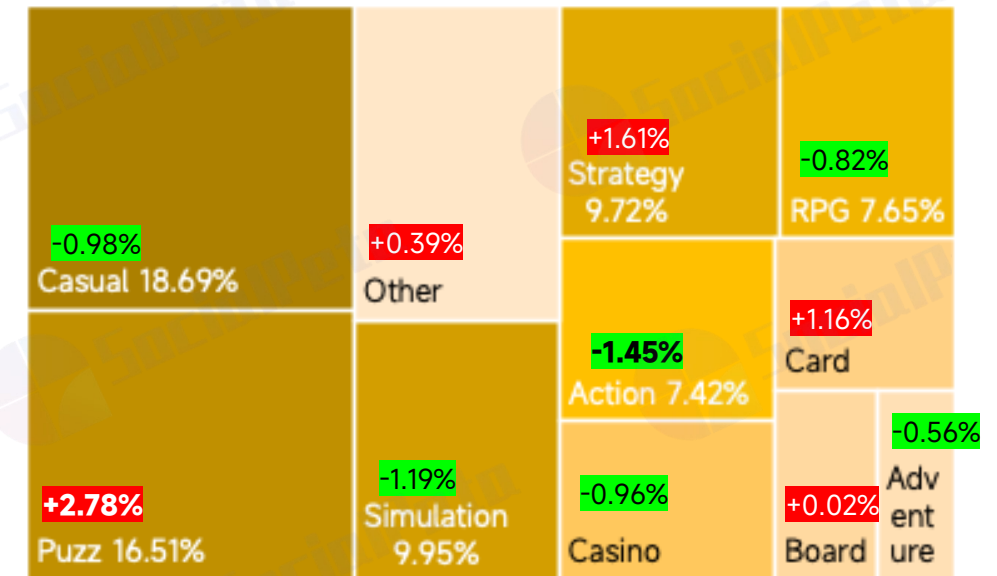
Casual and Puzzle games became hot areas for competition, Simulation and Action games showed a slowing trend

Casual game advertisers account for an extremely high proportion of all in the USA, growing by 1.90% QoQ in 2022Q3. Puzzle games saw the most releases, registering a QoQ growth of 2.78%. There was a big decline in the number of RPG mobile game advertisers and the creatives released also decreased slightly

Advertisers



Creatives



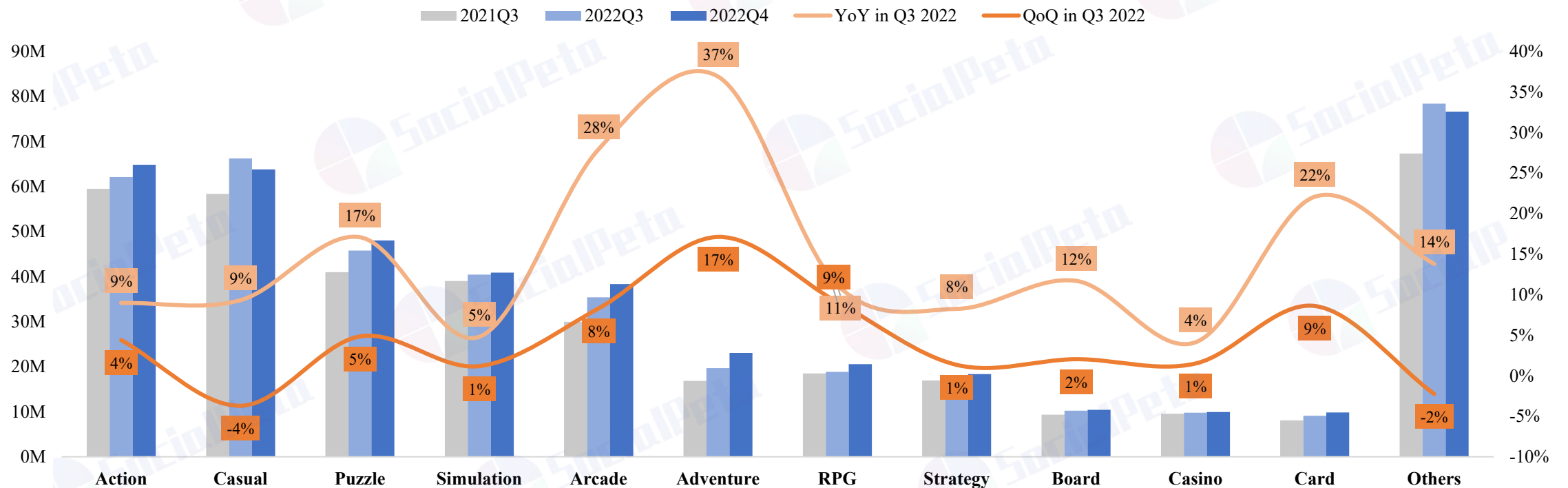
Insights on Q3 Mobile Game Marketing in the USA

Adventure and Arcade games attracted the most players

Adventure and Arcade games rose rapidly because of newly published games, such as [Survivor.io], [Hoard Master] and [Crowd Evolution!]

Among the top 3 gameplays in North America, **puzzle games had the highest growth**

Trend chart of mobile game DAUs in the USA (sorted by game genres)



Insights on Q3 Mobile Game Marketing in the USA

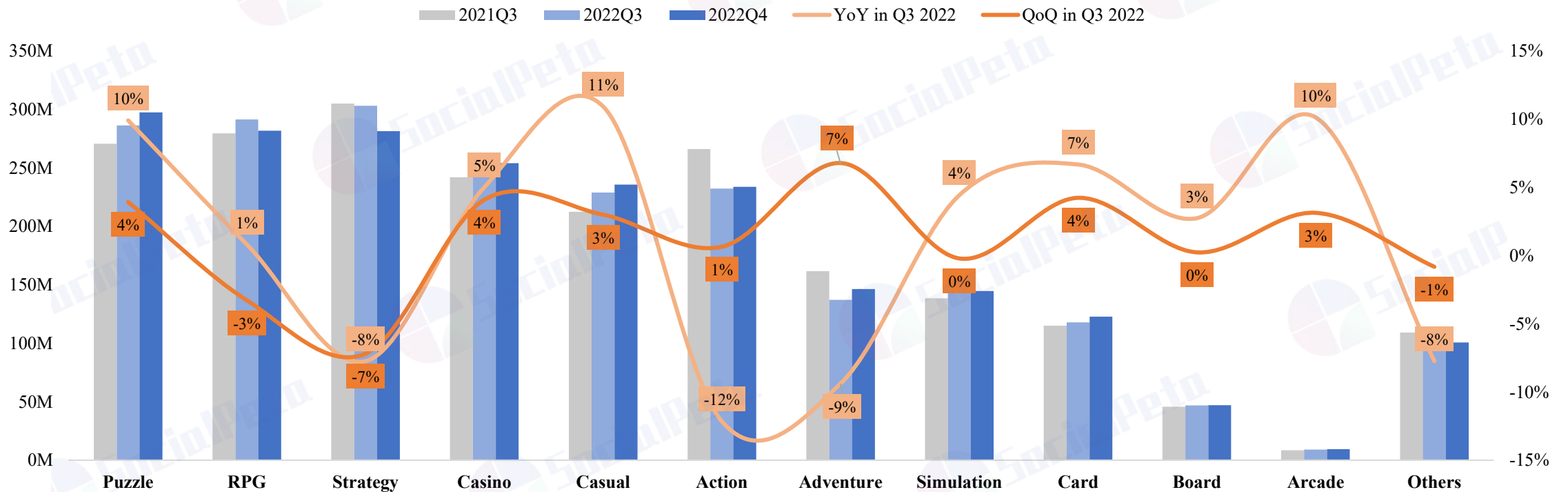


Relying on the classic match-3 product, Puzzle games made the highest revenue in Q3

In 2022Q3, **Puzzle games triumphed over RPG and Strategy games** and emerged as the largest and fastest-growing game genre in the USA.

Classic match-3 games such as [Candy Crush Saga], [Homescapes] and [Fishdom] kept releasing new versions and doing events to strengthen paying users' adhesiveness.

Trend chart of mobile game revenues (IAP, unit: \$) in the USA (sorted by game genres)



Insights on Q3 Mobile Game Marketing in the USA

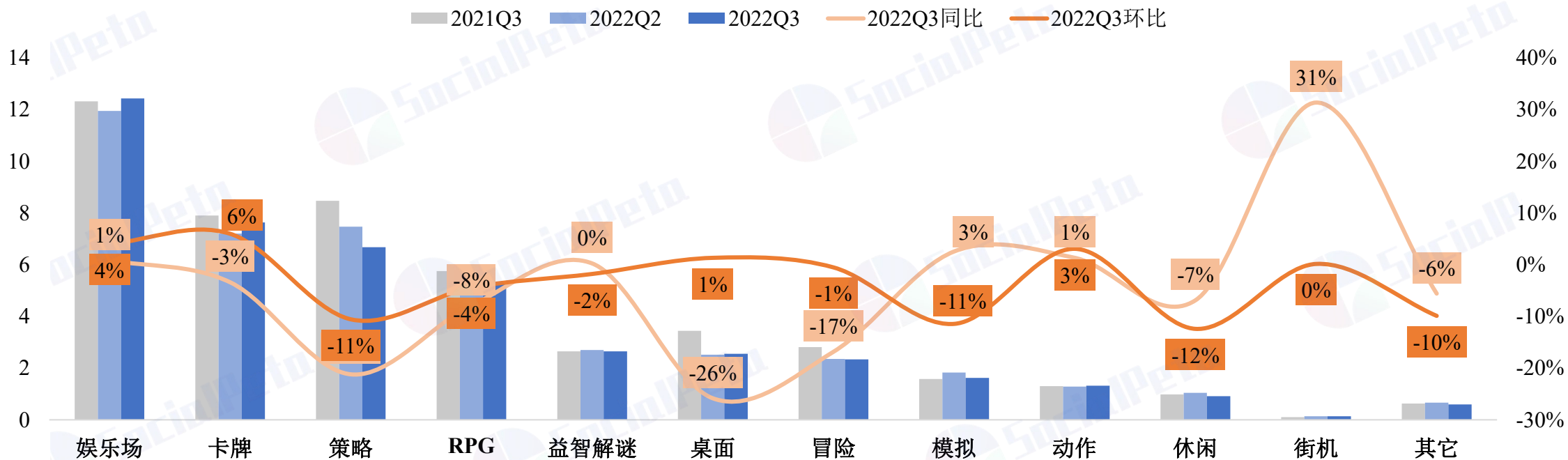


Casino games had the highest ARPU in the USA

Players of casino games are extremely willing and able to pay, far exceeding other game genres

Arcade games showed the fastest ARPU growth in Q3 and the growth mainly came from the game [Bricks Ball Crusher]

Trend chart of mobile game ARPU (unit: \$) in the USA (sorted by game genres)



Hot New Advertiser in the USA in Q3



Wolf Game

Magic Prime

[Wolf Game] is an SLG mobile game where players play the role of a wolf. In the game, players need to lead the pack to surround lairs and lift the profile of their own packs by gathering the strong, exploring the wild, building the kingdom, etc. Like other SLG mobile games, [Wolf Game] allows players to form alliances or battle with players from around the world.

Magic Primes' earlier mobile games were mainly about [navigation and animals](#), and the genres were mainly [strategy](#) and puzzles.

2022-05-30

First advertising

1.1K

iOS De-duplicated
Creatives

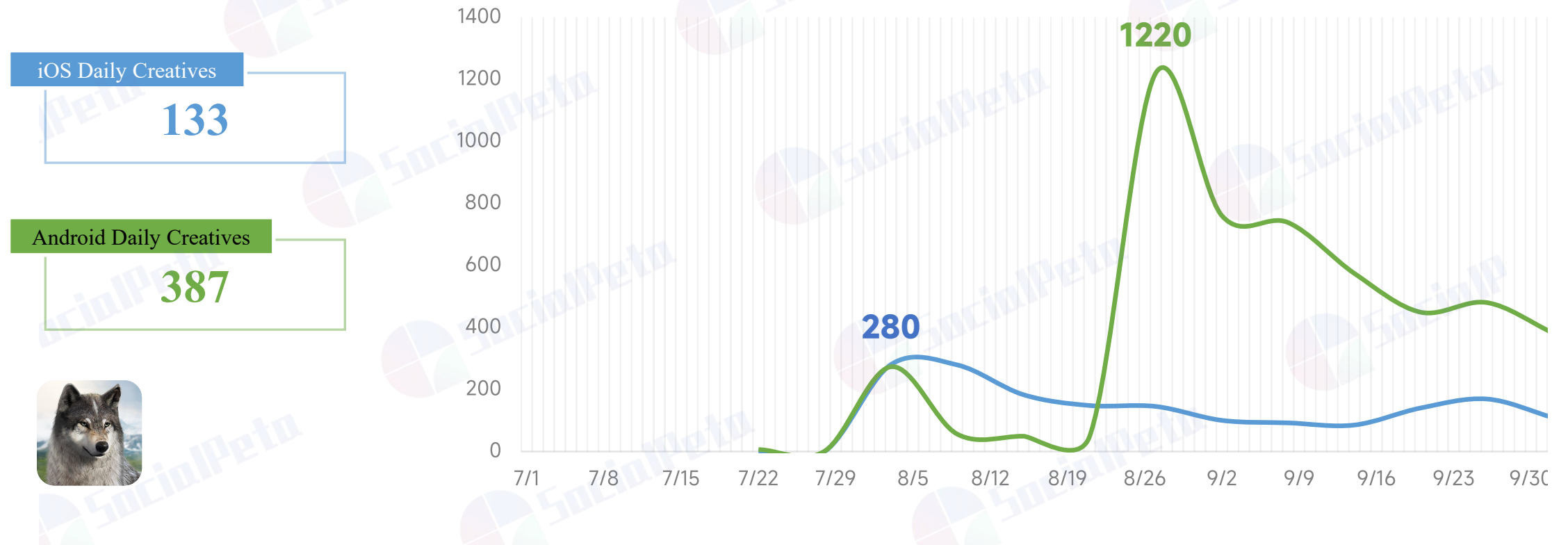
2.5K

Android De-duplicated
Creatives

[Wolf Game] Marketing Insights

Mainly released on Android devices and went steadily on iOS

[Wolf Game] tried to release creatives in May 2022, but the scale was rather small. It officially launched its media buying and publicity in July and the advertising peak appeared at the end of August. The de-duplicated creatives peak was nearly 1,400

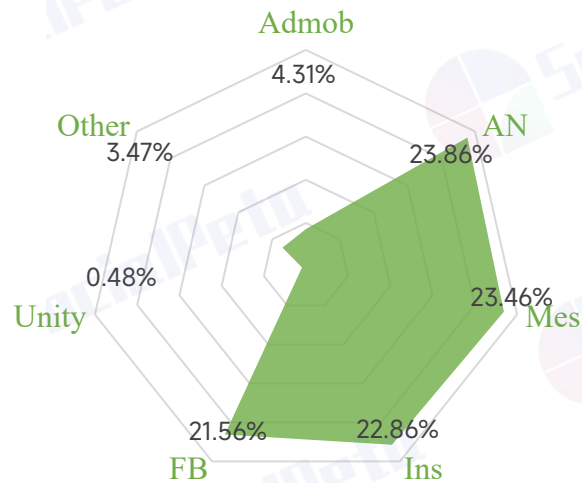


Analysis of [Wolf Game] on Android

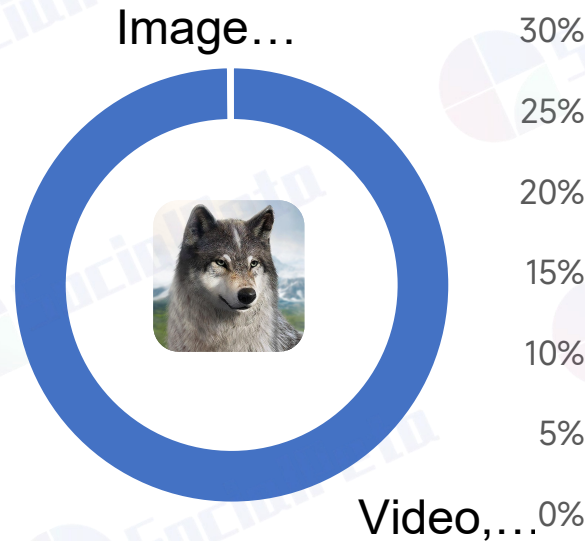
More than 90% for video creatives, with a preference for RPG media channels

[Wolf Game] was mainly advertised on Meta channels, and the proportion of creative advertises on Audience Network was as high as 23.86%. In terms of creative types, most creatives are videos. For types of advertising medias, the majority is RPG mobile games, accounting for 33.11% of the total, while strategy games only accounted for 7.34%.

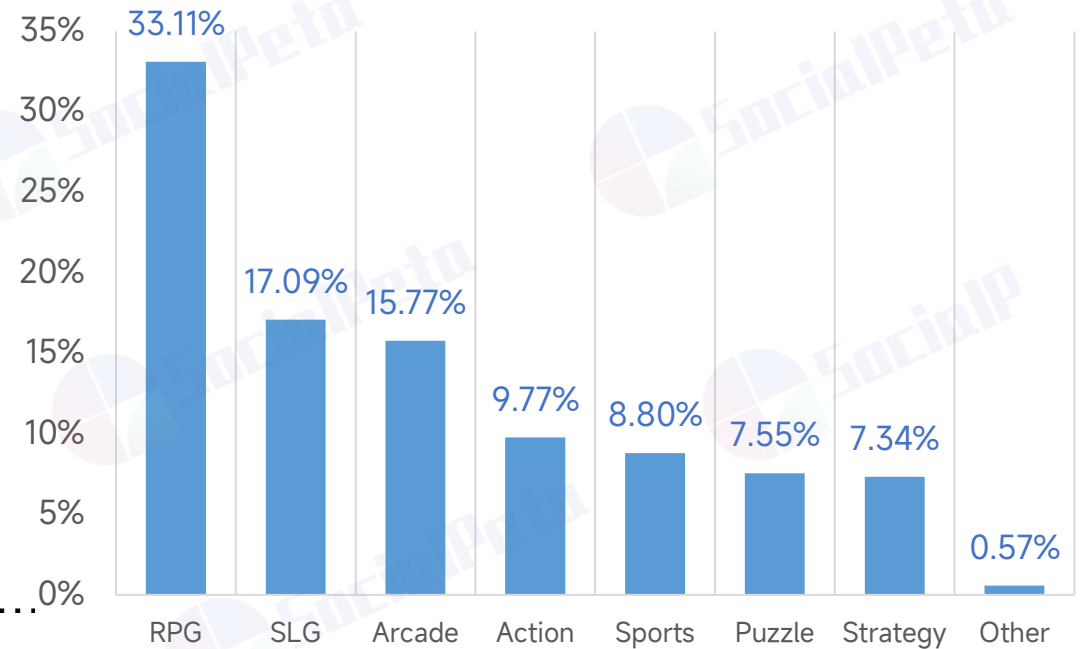
Advertising Channels



Creative Types



Advertising Media Types

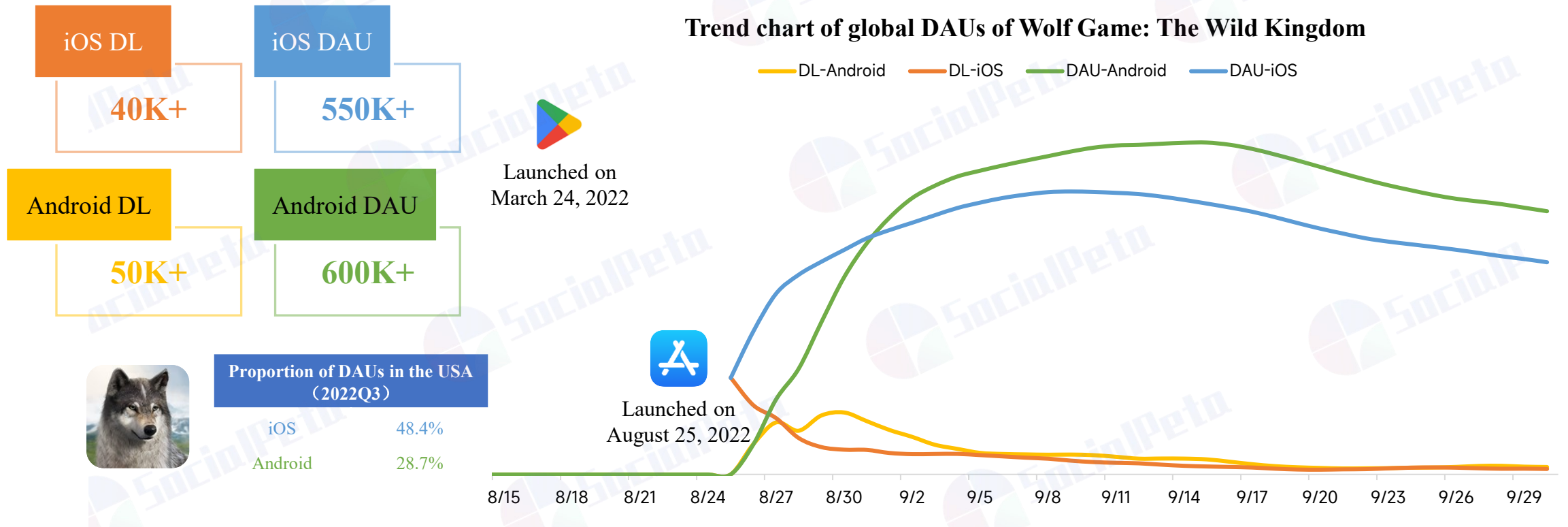


[Wolf Game] DAUs

Android users are more active than iOS users

The game was launched on Android first, but no media buying was made in the USA until it was launched on iOS.

By comparing the DAUs and downloads, it's obvious that this game's player acquisition was more efficient and accurate on Android.



[Wolf Game] Retentions

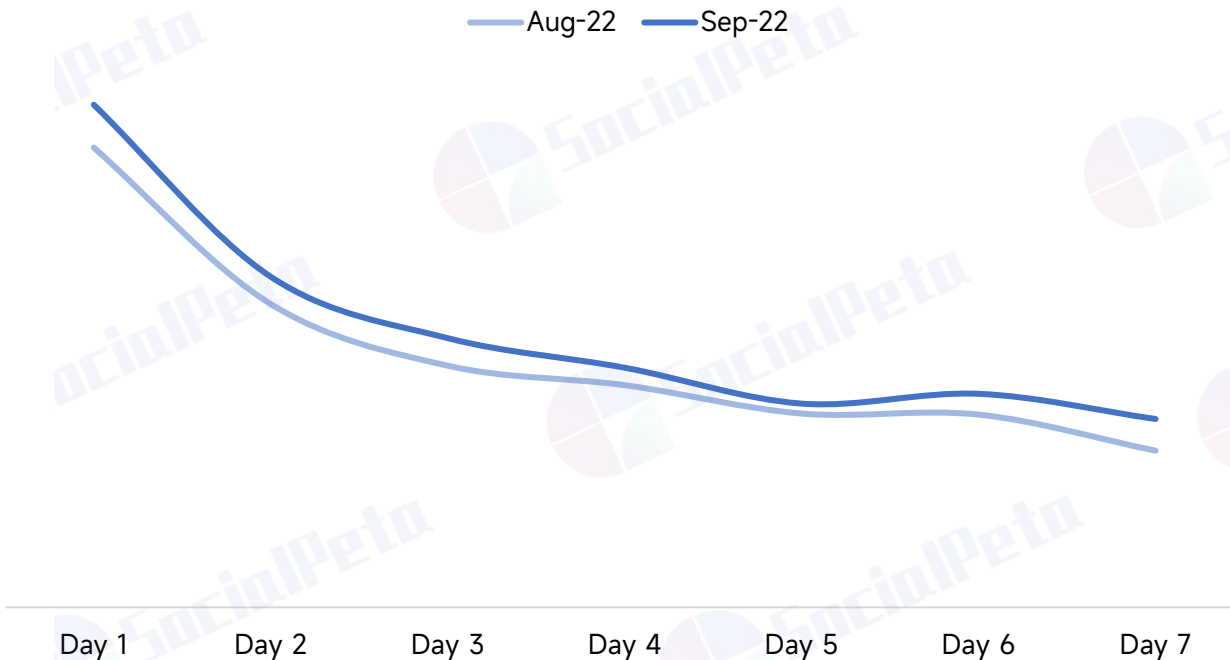
The game's short-term retention achieved growth

Compared with August, retentions in September showed an overall growth with the highest growth approaching 4% (Due to statistical channel issues, the data is for reference only)

It suggests that the attempts made in September to add more gameplays and optimize the gameplayer interaction were fruitful.



Wolf Game: The Wild Kingdom Retention Chart



Updated on 2022/09/15

[New]

- Add the Zombie Invasion mode- Add the feature to save your deployed formation so you don't have to configure it every time!
- Add the guaranteed reward for daily packages: you will at least get 1 Conan Shard from the Conqueror Chest

[Optimizations & Tweaks]

- Optimize some features in Home
- Optimize the method to search for animals in the wild
- Optimize the experience of teleporting near the alliance early in the game
- Optimize the special effect of Conan's skill
- Lower the difficulty to get points in Apex Wilderness
- Lower the casualties ratio in Apex Wilderness
- Optimize the rewards in Treasure Hunter
- Fix the text for Hero Evolution Level
- Optimize the overall schedule in Monument
- The Gray Wolf compatibility for Ace is S now

[Bug Fixes]

- Fix some known bugs

[Wolf Game] Q3 Hot Creatives



Release Days: 48

Creative Size: 640 * 640

Release Channel:  FB News Feed

Creative Text:



Lead your wolfpack and become the king of the wild!

Killed by a tiger and reincarnated!

One more time, I'll take everything!

Popularity: 230

Est. Impressions: 1.6M



Insights on Mobile Game Marketing in the SEA in Q3

Insights into Q3 Mobile Game Marketing in SEA

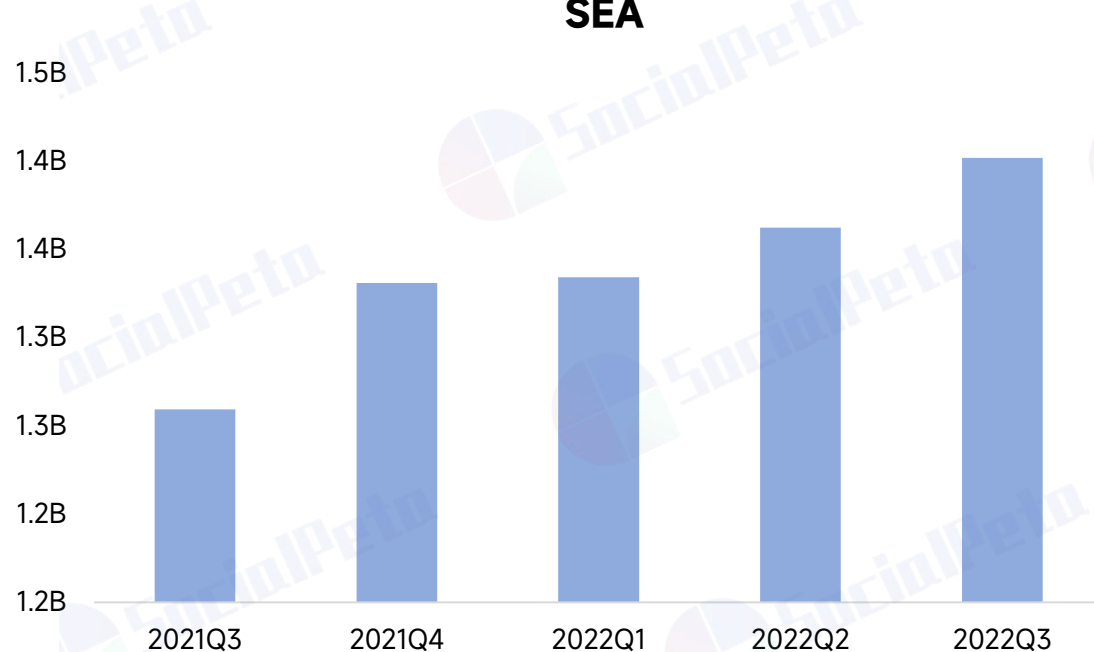


SEA remains a growing market

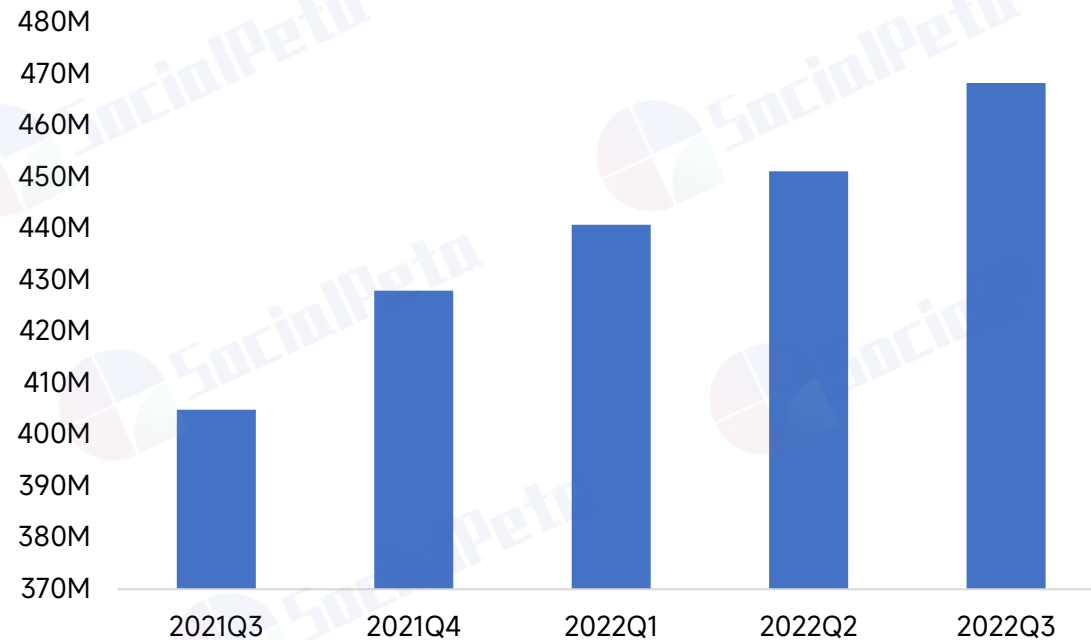
Both downloads and DAUs in SEA kept growing in last year

In 2022 Q3, downloads increased by 3% and DAUs grew by 4% quarter-on-quarter. The size of active users exceeded 460 million

Trend chart of mobile game downloads in SEA



Trend chart of mobile game DAUs in SEA



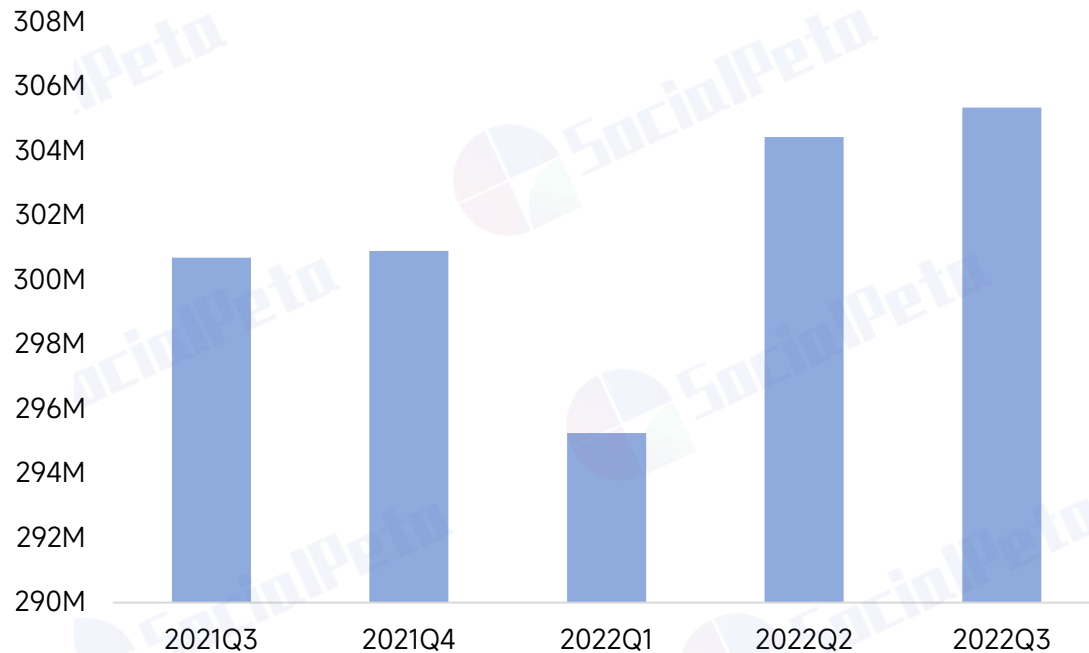
Insights on Q3 Mobile Game Marketing in SEA



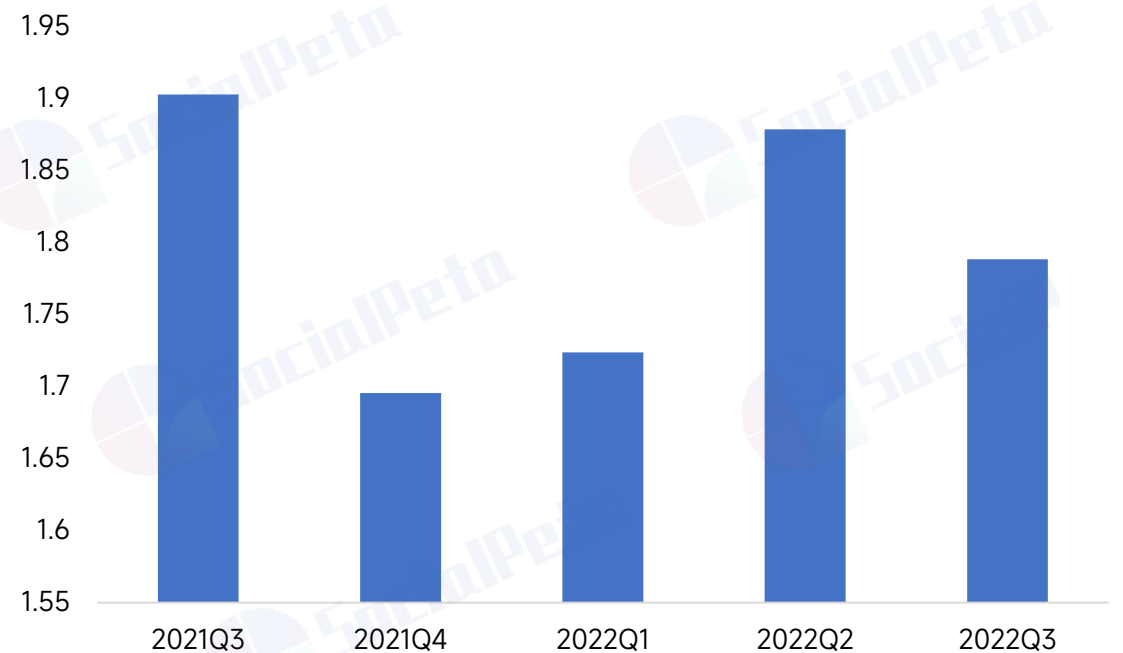
IAP grew steadily

Mobile game revenues grew steadily in Q3. Compared to Q2, the total revenue of Q3 increased by \$900,000 with a two percent growth YoY. ARPU dropped a little and it still hasn't returned to the level in 2021 Q3.

Trend chart of mobile game revenues (IAP, unit: \$) in SEA



Trend chart of mobile game ARPU (unit: \$) in SEA



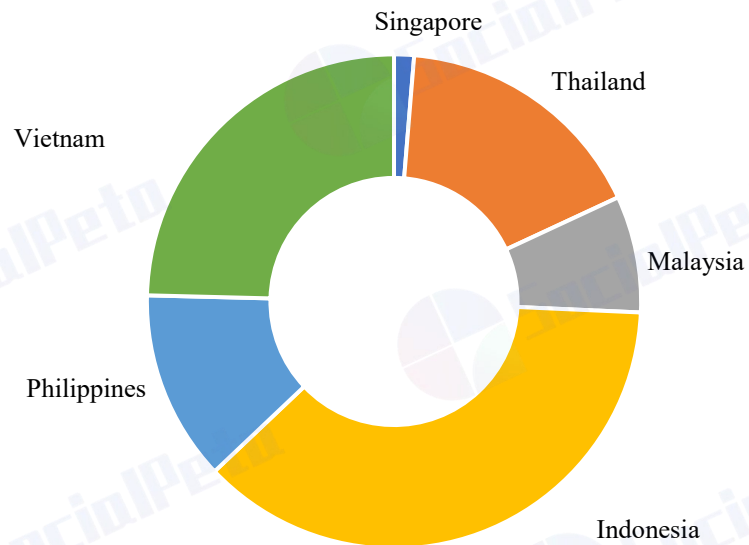
Insights on Q3 Mobile Game Marketing in SEA

The majority of players come from Indonesia whereas the most revenue was generated from Singapore, Malaysia and Thailand

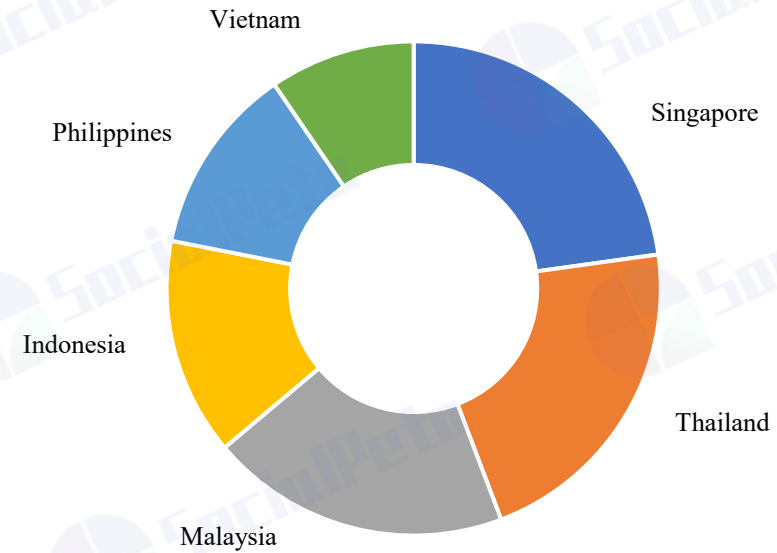
Indonesia contributed over 1/3 of mobile game traffic, but only account for 15% of the total revenue

Singapore, Malaysia and Thailand contributed over 60% of mobile game revenues even though they have smaller user size

Distribution of mobile game traffic (DAU) in SEA in 2022Q3



Distribution of mobile game revenue (IAP, unit: \$) in SEA in 2022Q3



Insights into Q3 Mobile Game Advertising in SEA



84% of advertisers released new creatives, with a 4.18% growth compared to Q2

The number of new advertisers in SEA has been growing continuously, except in 2022 Q2. In Q3, 80% of advertisers are new faces. In the last five seasons, the ratio of new creatives remained at 40%.

Advertisers released new creatives

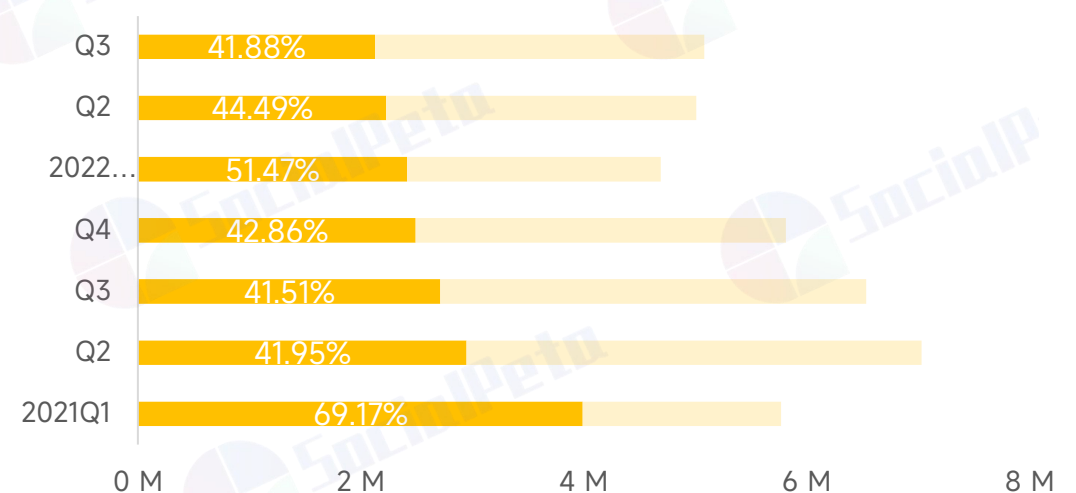
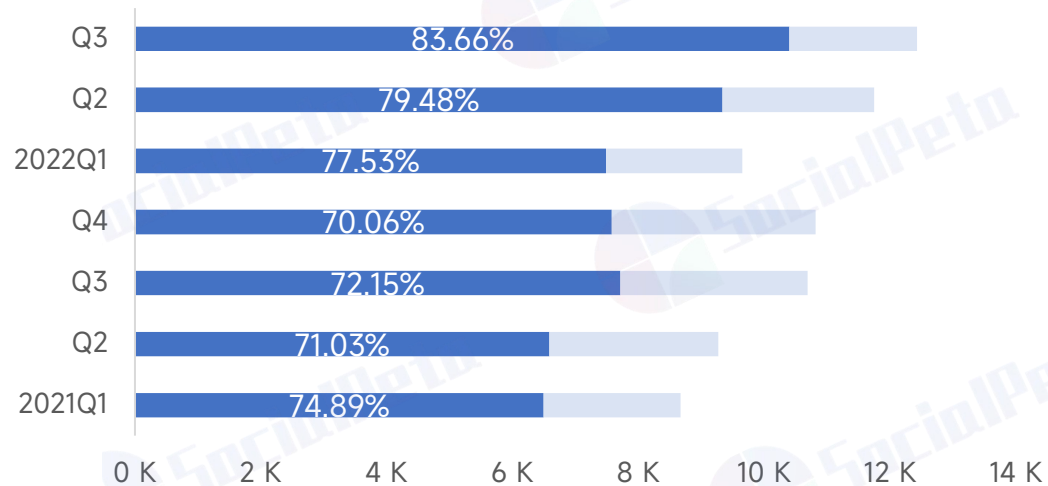
The proportion rises quarter by quarter. A 12% increase in Q3 compare to last Q3

10.4K 84%

New creatives

The proportion of new creatives drops year by year. A 2% decrease in Q3 compared to Q2

2.1M 42%

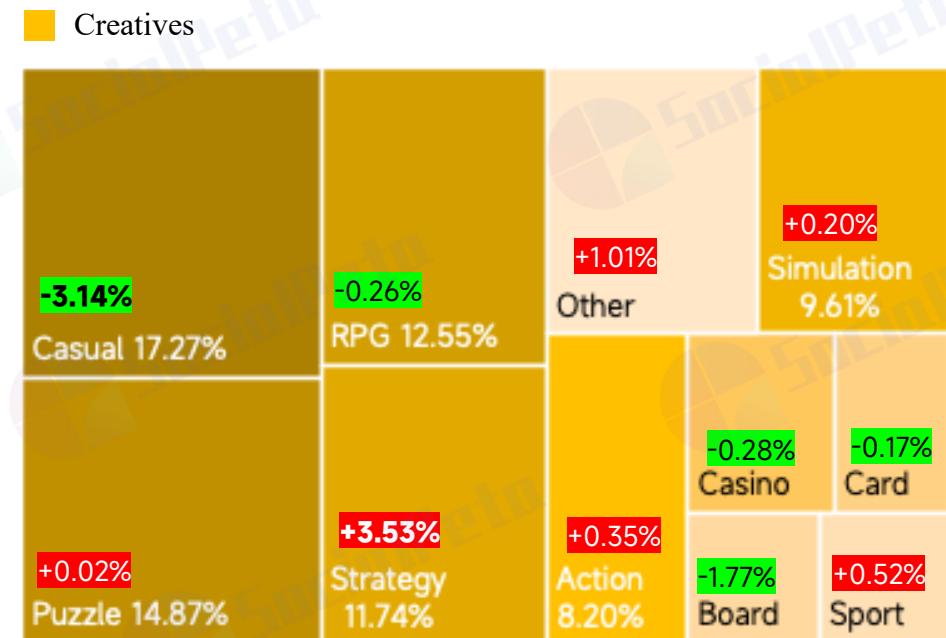
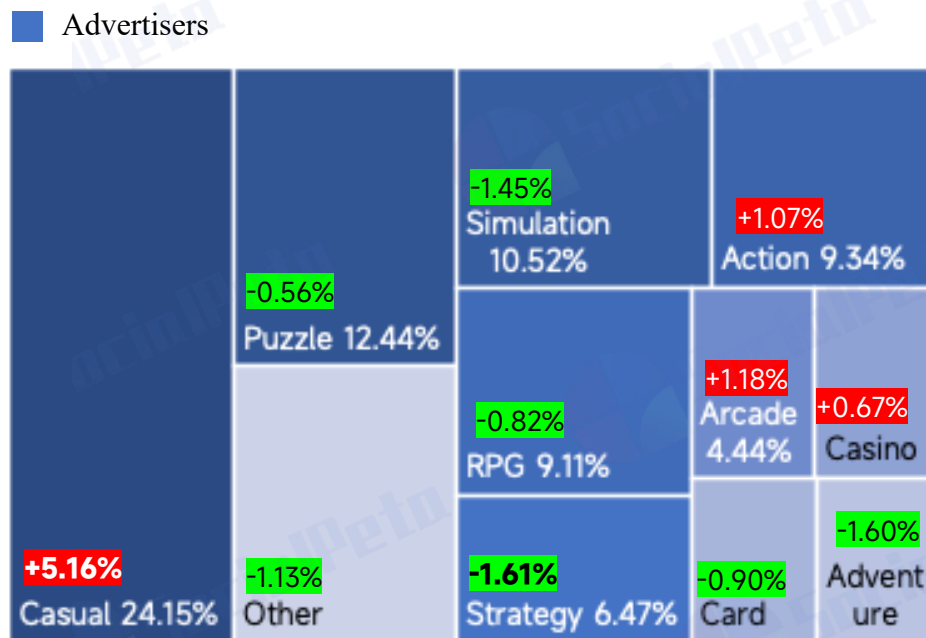


Insights on Q3 Mobile Game Advertising in SEA

A sharp decrease of media buying for casual games; Strategy games spent more on advertising

In Q3, Casual game advertisers accounted for more than 24%, an increase of 5.16% compared to Q3 last year. Strategy game advertisers accounted for 6.47%, a decrease of 1.61% compared to Q3 last year, marking the greatest drop in advertisers

Strategy game creatives accounted for 11.74%, an increase of 3.53% compared to Q3 last year. Casual game creatives accounted for 17.27%, a decrease of 3.14% compared to Q3 last year, marking the greatest drop in the number of creatives.



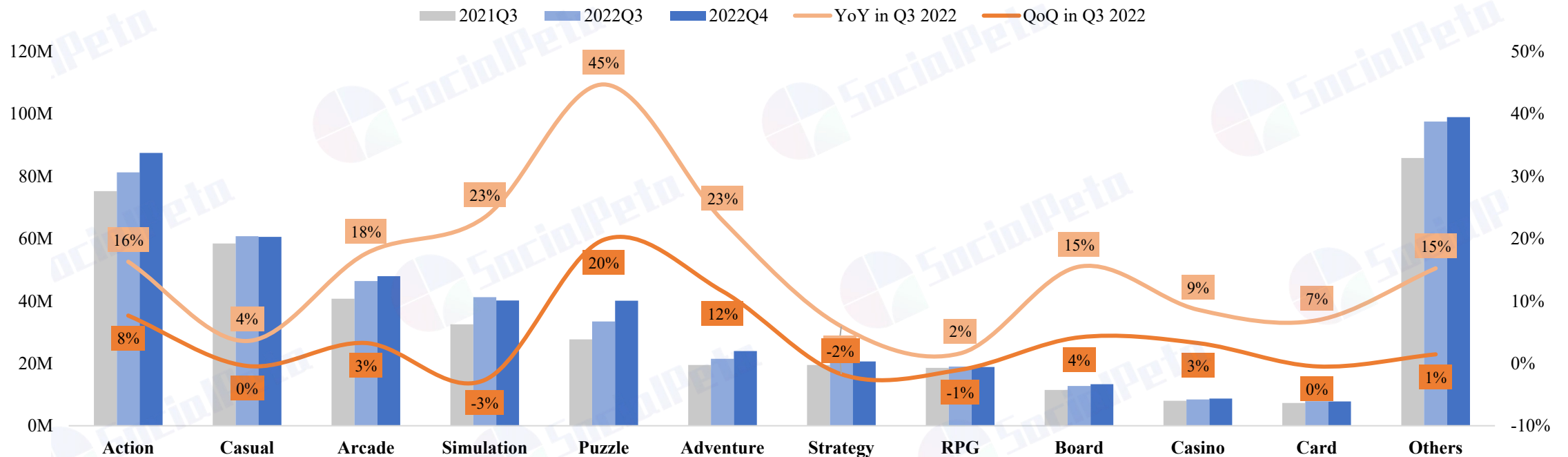
Insights on Q3 Mobile Game Marketing in SEA

Puzzle games attracted new players very quickly

Action and casual games are the favorite game genres in SEA. Users of action games rose steadily while the user base of Leisure games remained stable.

Puzzle games' DAU rose by 45% YoY and 20% QoQ. The recent growth came from the booming development of [Save the Doge] in SEA

Trend chart of mobile game DAUs in SEA (sorted by game genres)



Insights into Q3 Mobile Game Marketing in SEA

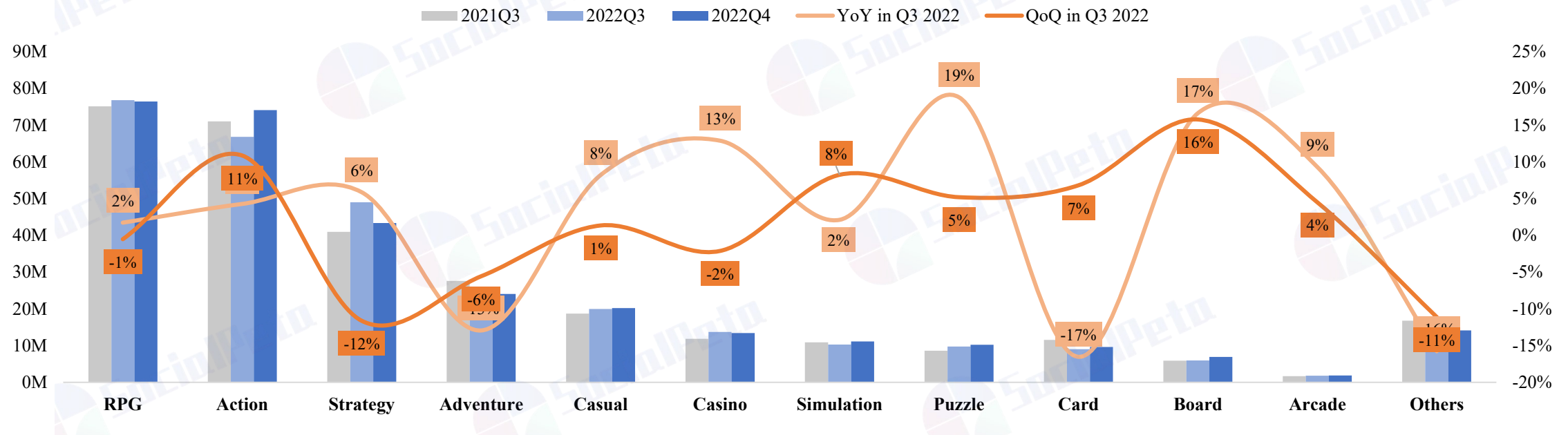


RPGs contributed the most to revenue, while Action games grew at the fastest speed

RPG games generated the most revenue, an increase of 2% in Q3 YoY. The revenue of Action games increased by 11% QoQ in Q3 and has reached almost the same amount as RPGs. Action games has closed the gap to merely \$2 million

Casino games grew by 13% in Q3 YoY. The growth mainly is attributed to some of the most popular games, for instance [JinJinJin], [Slotomania™ Slots Casino Games] and [Jackpot World™]

Trend chart of mobile game revenues (IAP, unit: \$) in SEA (sorted by game genres)



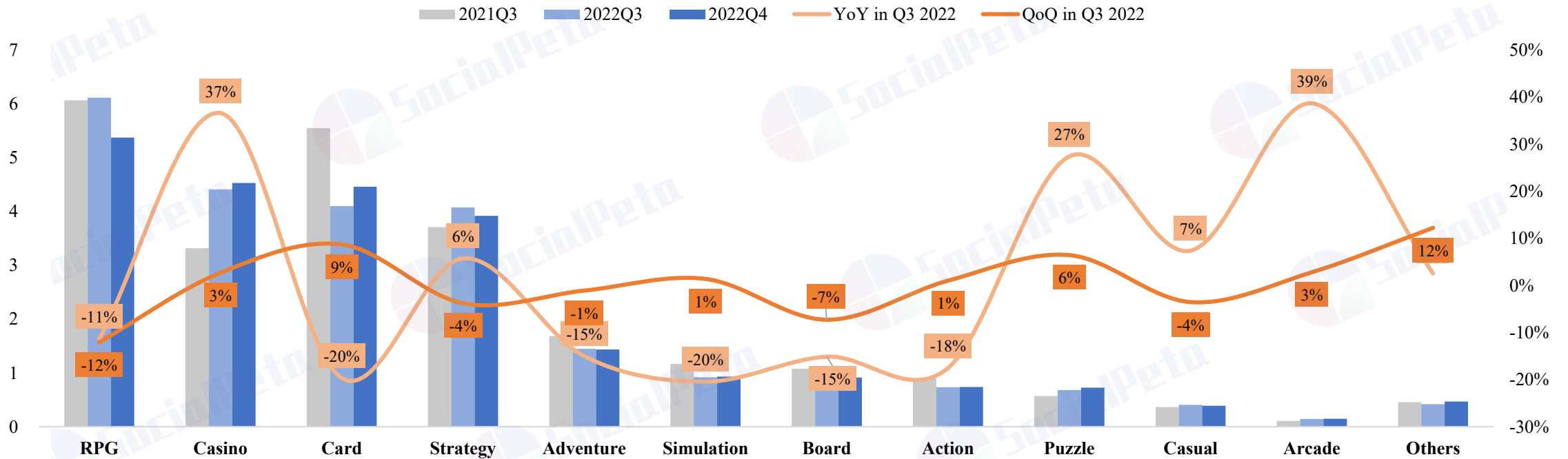
Insights on Q3 Mobile Game Marketing in SEA



Paying capacity of Casino games rose significantly

The ARPU of Casino games in SEA rose 37% YoY, registering the fastest growth among the top 5 game genres. Puzzle games and Arcade games also realized quick ARPU growth, up 27% and 39% YoY in Q3 respectively.

Trend chart of mobile game ARPU in SEA (unit: \$) (sorted by game genres)



Hot New Advertiser in SEA in Q3



Giang Hồ Kỳ Hiệp 3D

Funtap

[Giang Hồ Kỳ Hiệp 3D] MMO swordplay martial arts game developed by Funtap with sharp and realistic 3D graphics, bringing the guests back to the golden age of martial arts games, swordplay with familiar sects. The Android version and iOS version were released in Vietnam on July 21 and August 12 respectively and was ranked top in App Store Overall Rankings, Free Game Rankings, Action Game Rankings, and RPG Game Rankings on August 17, and got an App Store rating of 4.5.

Funtap is a famous Vietnamese developer that has developed several popular fantasies and martial arts MMO games.

2022-8-4

First Release

1560

iOS De-duplicated Creatives

2925

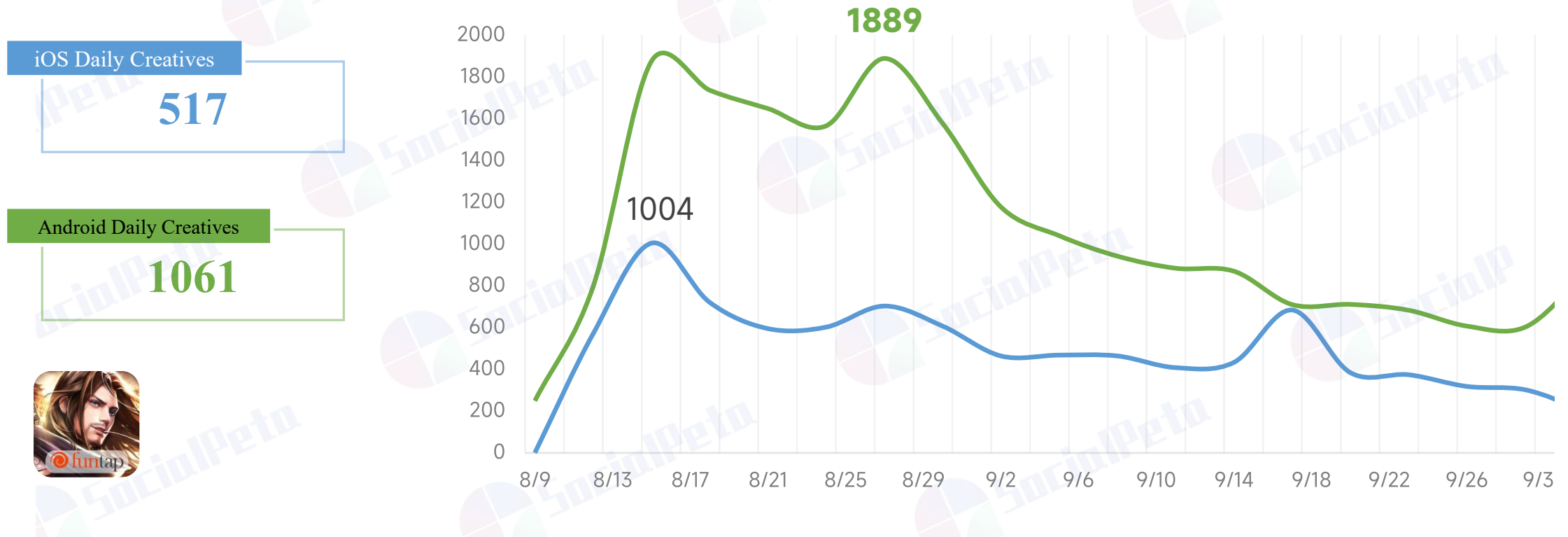
Android De-duplicated Creatives

[Giang Hồ Kỳ Hiệp 3D] Global Release Insights

Daily creatives on Android was **nearly 1.1K**, 105% higher than on iOS

The advertiser mainly released on Android with **1061 creatives daily on average and the peak daily release was nearly 1900**; the number of iOS daily creatives was 517 and the peak was over 1000.

In Q3, the release peak was crossed twice and started declining on September 18. In general, the releases on both platforms are declining.

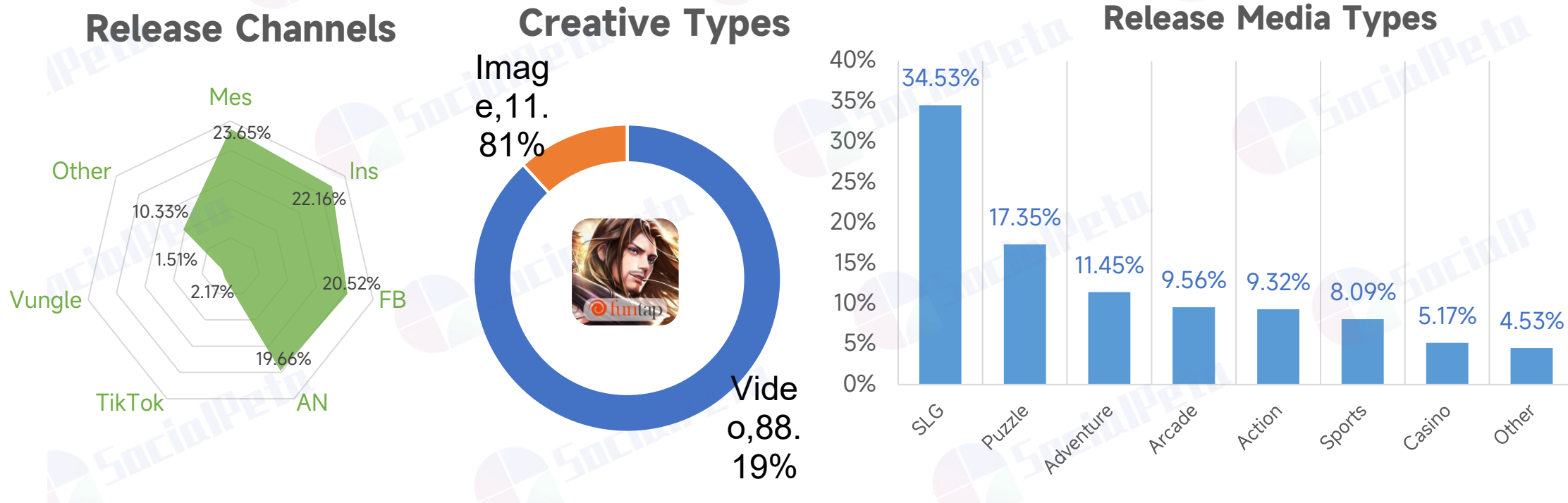


Analysis of [Giang Hồ Kỳ Hiệp 3D] Releases on Android

FB creatives accounted for nearly 90% and SLG Mobile Games have become its main releasing media

Nearly 90% of all creatives were released via FB channels among which FB News Feed received the most releases

In terms of creative types, video creatives accounted for 88%, and 34.53% of all ads were released on SLG Mobile Games Media.



[Giang Hồ Kỳ Hiệp 3D] DAUs

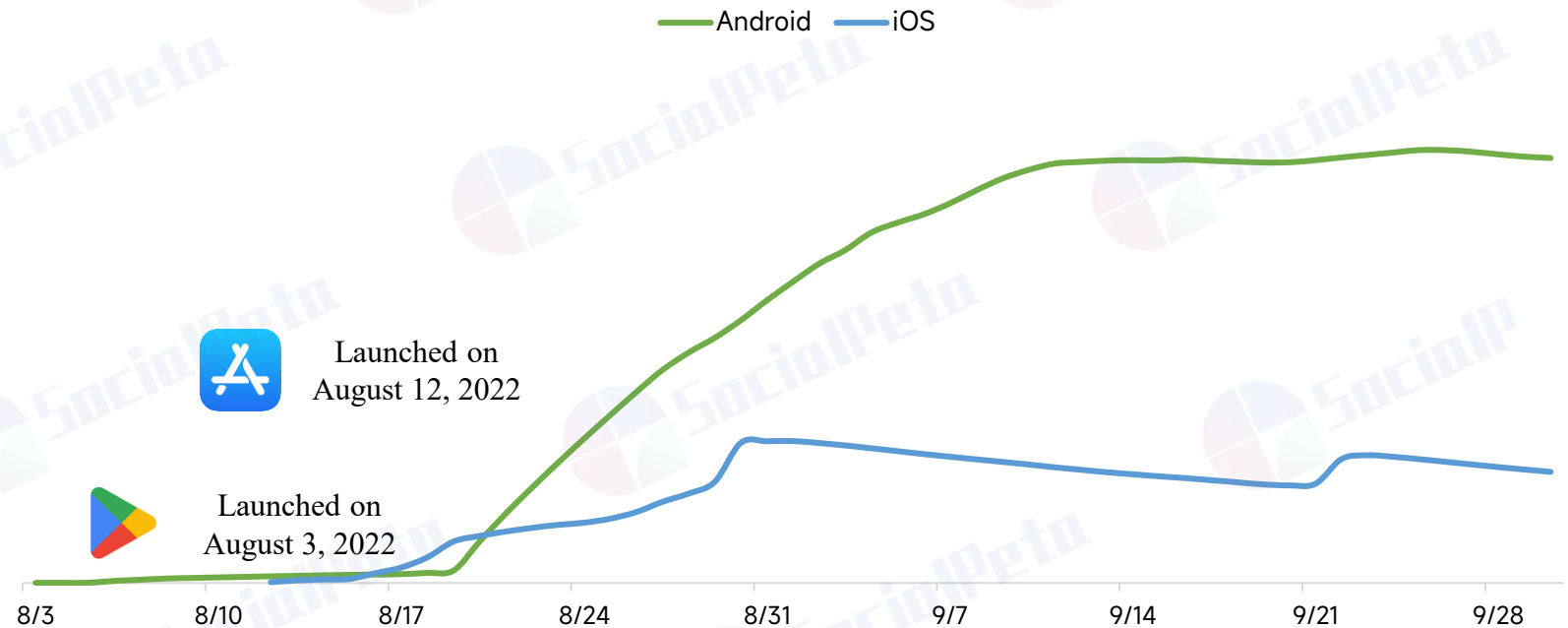
Most players are Android users

The majority of the game's players are Android users and the player base has been rising steadily (showing a decline recently).

Trend chart of DAUs of Giang Hồ Kỳ Hiệp 3D in Vietnam

iOS DAU
80K+

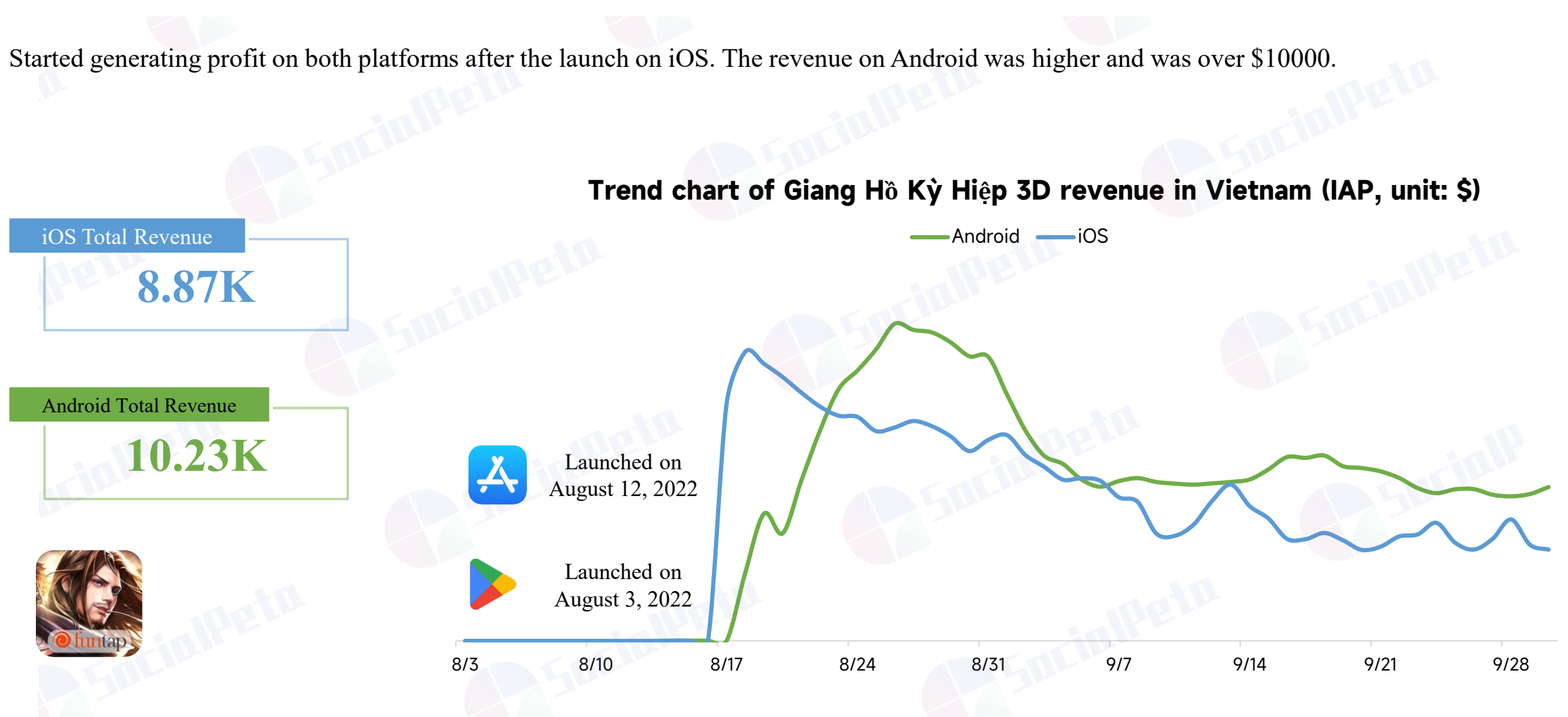
Android DAU
30K+



Insights on Revenue Trend of [Giang Hồ Kỳ Hiệp 3D]

Steady revenue on Android

Started generating profit on both platforms after the launch on iOS. The revenue on Android was higher and was over \$10000.



SocialPeta - the world's leading advertising and marketing platform

Provide real-time updates on global market trends, as well as insights into competitors' advertising data and promotion/marketing strategies, to enable more cost-effective global customer acquisition.

Broad

Platform; coverage of countries/regions; dimensions of analysis



Over 1.2 billion advertising data



Exclusive data and traffic intelligence

Large

Data size



Covering 5.1 million advertisers



Over 70 channels covering nearly 70 countries/regions worldwide

Rapid

Data updating



Multidimensional in-depth analysis of products



Over 1 million ad data being updated by the hour each day

In-depth

Intelligent recommendation; self-developed algorithm

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



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