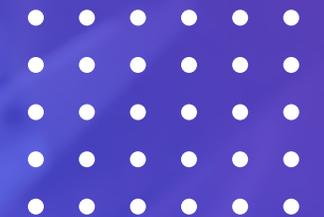


2023 Global Mobile Games Marketing Trends White Paper

2023 GLOBAL MOBILE GAMES MARKETING REPORT





Preface

In 2023, the overall gaming market had been experiencing a pullback after its peak during the pandemic. Economic turmoil and slump also constituted a further challenge to game developers.

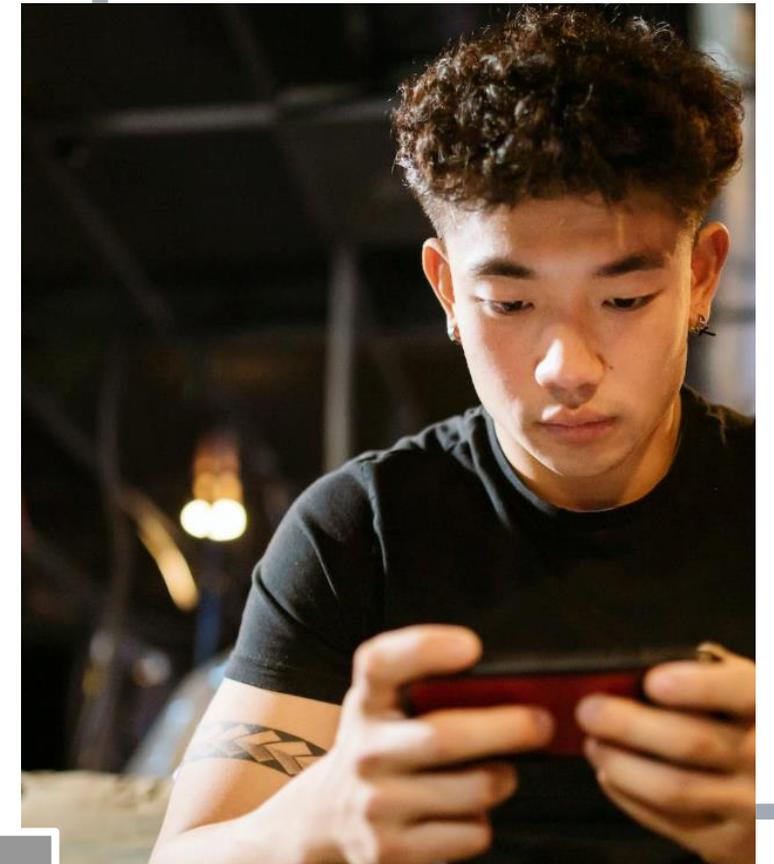
Beset by unsatisfactory downloads and IAP revenue as well as market saturation, game developers had to look for growth opportunities in emerging markets and try mixed-paying systems.

In search of new opportunities for growth, developers need new markets and product types with potential growth. But for growth to be sustainable, they also need support from excellent data analysis tools and advertising platforms. Therefore, mixed-paying systems will still be the general direction of industry growth and revenue increase. It's expected that in-app purchases complemented by various advertising monetization strategies will maximize the revenue per user, and eventually lead to increased ROI.

There were two major marketing trends in the global mobile games market in 2023: a rising number of advertisers, and increases in the proportion and number of new creatives.

As significantly higher-quality creatives were required in 2023, it was crucial that game advertisers released unique and charming ad creatives to attract users. In terms of global mobile games marketing, the Asia-Pacific region remained the most competitive. Southeast Asia experienced the fiercest competition in media buying in 2023. Blue Ocean Markets started to bloom. And due to privacy policy, proportion of mobile games, and other matters, Android greatly surpassed iOS in marketing efforts, and is expected to do so in 2024.

The “Marketing” section of this report analyzes the marketing trends of top games by genre and region, and the advertising of hit games in 2023. This report is provided in the hope of helping people in the game industry by summing up their experience in 2023 and seizing opportunities in 2024!





With SocialPeta, you can spy on your competitors' ad data, and get ad data from networks, media, and advertisers around the world to inspire you. SocialPeta covers more than 70 countries/regions and over 70 well-known ad channels worldwide, such as Facebook, Twitter, YouTube, TikTok, and Unity. We provide nearly 1.4 billion ad creatives, updating millions each day. Through **duration, impressions, popularity, and interactions**, we can quickly locate the active high-quality creatives which will be provided to you in real time to help with your marketing plan.

As one of the world-leading advertising and marketing platforms, SocialPeta boasts a huge database and the experience of working with thousands of game companies and providing mobile game workers with more practical methods in order to develop more popular games.

5.10M

APP Advertisers

1.4B

APP Ad Creatives

1.20M

Daily Updates

Website: www.socialpeta.com

CONTENTS

CONTENTS

1

Charts of Top Global Mobile Games

Top Mobile Games by Advertising

Top 20 by Downloads & Revenue

2

Marketing Analysis of Global Mobile Games

Media Buying Trends of Mobile Games per Month

Changes in Ad Creatives by Genre

3

Top Mobile Game Markets

The U.S., Japan, South Korea, Russia, etc.

Marketing Trends

4

Top Game Genres

Various Genres of Hard-Core, Mid-Core & Light Games

Marketing Trends

5

Marketing Cases of Top Mobile Games

Mobile Games Marketing Plans

Case Analysis of Popular Creatives

6

A Look Back at Hot Events

AIGC+ Mobile Games Marketing

Overview of Mini-Game Marketing



INDUSTRY INSIGHT

Singular, udonis, India Game Developer Conference, App Masters, AdQuantum, Person.ly, AppSamurai, Appvertiser, Thiết kế Game, Gamee Studio, UGC Ninja, Tenjin, Mobidictum, AnyMind Group.



One of the exciting things in our industry is the speed at which it innovates. Singular releases its annual ROI Index every year in Q1 and last year we already observed some notable movers and shakers. On the one side we see networks like TikTok dramatically increasing its share of voice in market whilst DSPs competing on 'the open web' battle between them for top rankings: a select club is proving to be most effective here. Apple Search Ads is now also ranking as a top source but considering the impact ATT had on the IOS landscape as a whole and it being a high-intent channel this lies in the line of expectations.

What is interesting to look at is the development of other channels. Here we'd like to single out CTV, Influencers and Rewarded Advertising as growth channels. CTV because it opens up new 'screens' for performance advertisers, influencers because they reach new audiences and rewarded ads because they offer engaging and effective ad formats. Our advise for 2024 is to keep an eye on MMP Rankings to make sure your UA mix includes the most important partners - but for incremental expansion, see if you can add partners that offer access to a user base you may not reach at this point in time.

As the industry continues to become more privacy centric we see developers still reeling from the rollout of ATT. Adapting to this new reality will be the prime challenge for developers, also in 2024. In our recent Skanathon Webinar series we polled a vast majority of developers still struggling with their IOS Growth Marketing - because they delayed SKAN testing, didn't have the right measurement tools in place or relied on shady workaround solutions. The reality is that a 'sticking your head in the sand' approach will hurt your business in the longtime. It will lead to problems with scaling with some of the largest networks, data discrepancies and missed opportunities on IOS. The reality is that with the rollout of Android Privacy Sandbox developers will be forced to adapt to a new Privacy reality if they want to remain competitive. Having the right tech star in place for measurement and analytics will be pivotal.

Niels Beenen
Director of Partnerships, EMEA at [Singular](#)



Industry Insights



The rise of hybrid casual games highlights a shift in player preferences and game development strategies. This genre, merging elements from both casual and hyper-casual games, has gained immense popularity due to its ability to offer a more engaging gaming experience. Unlike traditional hyper-casual games, known for their simplicity and brief play sessions, hybrid casual games bring in narrative depth, progression systems, and longer play sessions. This approach not only attracts casual gamers but also those seeking more substantial content, thus broadening the market appeal.

A critical advantage of hybrid casual games over hyper-casual games is their innovative monetization strategies. Moving beyond the predominantly ad-dependent models of hyper-casual games, these games employ diverse revenue streams like in-app purchases, subscriptions, and online event monetization.

This not only boosts their revenue potential but also establishes a more stable financial model, which ensures long-term sustainability. Moreover, the added depth in hybrid casual games is instrumental in fostering longer-term player engagement, a crucial factor for building a loyal user base and maximizing lifetime player value. The popularity of hybrid casual games reflects an evolving mobile gaming market where player preferences are gradually shifting towards more engaging experiences. This indicates a maturing audience within the sector.

For developers, **this trend emphasizes the importance of balancing engaging gameplay with monetization strategies. Embracing innovation in both game design and monetization is key to acquiring and retaining a diverse player base.**

Andrea Knezovic
Head of Content at [Udonis](#)



Industry Insights



With increasing adaptation of technology and the roll out of 5G technology across more locations in India will drive a lot of adaptation to mobile gaming especially in rural India.

Machaiiah Kalengada
Project Head at India Game Developer Conference



Two letters: A.I.

Especially when it comes to ad creation. I think humans still need to be involved in the creativity of an ad variation, but once a human has found a winning creative A.I. will be great to scale and produce more variations of the winning creative. **In short, a combination of human and AI will be the best mix to winning at user acquisition.**

Steve Young
Founder at [App Masters](#)



What trends should we dive into for mobile marketing in 2024?

As we look towards mobile marketing strategies for 2024, there are a few things worth exploring in depth:

UGC ads

We've seen a significant rise in the use of UGC within advertising campaigns, especially in comparison to traditional static and 2D/3D formats. This shift is largely influenced by the evolution of social media algorithms, which are increasingly designed to leverage the creativity of influencers worldwide. The reason behind this trend's popularity is its ability to cut through the clutter of high-quality, engaging content that floods users' feeds.

In 2024, we anticipate that UGC will dominate the mobile ad landscape, mainly because it demonstrates strong performance. This effectiveness is amplified when the content is not only of exceptional quality but also features endorsements or participation from well-known influencers. This kind of creatives is particularly effective in enhancing brand awareness and building trust with the audience.

AI technologies in creative production

It's a simple truth – in 2023, we witnessed generative AI carving out a significant niche in ad creative production. While the current quality of these AI developments isn't ideal, we can safely assume that in 2024 we will see an improvement in the quality and variety in use cases. We'll also see new services for automatic generation of ad creatives and enhancement of existing content.

Additionally, it's quite likely that more advertising platforms will incorporate AI solutions into their tools for creating ad campaigns, similar to how Taboola has integrated its internal AI Creative Generating tool.

Attribution and iOS

Here's a bold prediction: I believe we might see a continuation of a trend that began in 2023 – a loosening of mobile attribution restrictions on iOS (and perhaps Android too, especially if Privacy Sandbox is implemented). This could mean adopting models for attributing conversions or using probabilistic attribution methods. A good example is Meta's Aggregated Event Measurement. Alongside this, we might also see the introduction of additional tools and mechanisms for more precise traffic estimation.

Anton Kuzmin

User Acquisition Group Head at [AdQuantum](#)



What trends should we dive into for mobile marketing in 2024?

First and foremost, there is a great shift in UA budget allocation toward the programmatic channel and its' share will continue to grow with the demand for transparent highly targeted fraud-free solutions.

Secondly, the economic downturn made publishers allocate more budget to retargeting as a more cost-effective way to increase revenue.

Finally, we have seen a transformation in mobile marketing toward the “holistic” approach where ASO, UA, and Re-engagement departments work hand-in-hand. This massive change allows for measuring the impact of each department on the one hand — seeing the effect of one department’s activities on other departments — and monitoring and flagging discrepancies (caused by ad fraud) on the other hand.

Which ad network is projected to be more effective in the mobile marketing industry in the coming year?

As a DSP integrated with multiple T1 ad exchanges, it's hard to outline one network that fits all - the efficiency would strongly depend on the region, app category and, obviously the inventory of the network. Often, we can also see multiple auctions for the same placement, but having access to all options and optimizing the path, we can win the bid at a lower price. Another factor to consider is an ML-level applied for precise targeting, allowing to consider multiple factors to reach the best ROAS.

Taking into consideration all these, we strongly recommend our clients consider moving budgets toward programmatic DSPs integrated with high-quality ad exchanges for the best results.

Another channel to consider in the coming year is investing in rewarded networks that manage to achieve high ROAS and keep up with user retention.

Yan Reizin

VP of Global Business Development at [Persona.ly](https://personaly.com)



Hybrid-casual games emerged due to several factors, including privacy regulations, increasing CPIs, market transformation, and player behavior changes.

With their more complex gameplay mechanics, meta layers, and added depth, these games have immense potential for higher engagement levels, resulting in increased playtime and revenue. Hybrid-casual game marketers should look for innovative marketing methods such as Rewarded Playtime and Rewarded Engagement to stand out among competitors and attract players. The meta-layered structure of hybrid-casual games fits perfectly with reward-based campaign models, enabling marketers to craft enticing rewards for players, ultimately achieving higher LTV and retention. Which game genres are expected to receive increased ad spend in the mobile marketing industry next year? **During 2023, casino, tabletop, and match genres have a noticeable rise in popularity, dominating the charts for paid installs, and this trend is expected to continue into 2024.**

However, it is important to note that this increase is not confined solely to these genres. Hybrid-casual, puzzle, simulation, and RPG games have also seen more growth in downloads, and we expect them to amp up their ad spend to keep up with their growth.

Osman Soysal
Managing Director at [AppSamurai](#)



Industry Insights

appvertiser

In light of current market challenges, such as the significant issue with SKAD and the difficulty in accurately attributing forecasted numbers, there is a need for the adoption of machine learning models. These models can enhance accuracy, especially in media mix modeling (MMMs). The incorporation of AI is crucial due to the demand, with many companies still grappling with SKAD, particularly on iOS devices like iPhones and iPads. **Addressing the big issue between user acquisition (UA) and numbers is imperative. Companies are introducing new AI creative solutions to assist businesses in developing engaging creatives, including images and videos.** These solutions offer an alternative to standard approaches and can be more cost-effective, particularly for highly interactive 3D assets. The use of AI-generated creatives is gaining traction in various industries, even beyond mobile, impacting creative studios and companies in terms of time, money, and effort. E-commerce and casual apps are witnessing significant improvements in advertisements using AI-generated creatives. Major advertising channels like Facebook (FB), Google, Moloco, and AppLovin are integrating machine learning and actively seeking ways to enhance it.

The importance of machine learning in 2024 is expected to increase, with many companies undergoing layoffs in roles related to generic work, opting instead to hire AI specialists. We face both opportunities and challenges in long learning phases and efforts to improve performance. **Adapting algorithms to identify good users is a constant goal for demand-side platforms (DSPs), though making changes in modules can impact performance.** AI offers benefits for app owners, such as quicker understanding of the effectiveness of uploaded videos and optimizing costs based on performance. Despite challenges, the use of AI in mobile marketing is anticipated to evolve in 2024, providing valuable insights into user behavior and optimizing ad performance. However, it's worth noting that ChatGPT may not have extensive insights into the mobile marketing landscape for 2024.

Mikayel Mirzoyan

Senior Performance Marketing Manager at [Appvertiser](#)



Industry Insights



The recent surge in popularity of hybrid-casual Games signifies an intriguing evolution within the gaming industry.

These games pioneer a new trend by amalgamating unique elements from various gaming genres, offering an engaging and diverse player experience. One of the most distinctive aspects of hybrid-casual titles is their ability to bridge the gap between casual gamers, who seek easily accessible and straightforward gameplay, and "real gamers" who crave novel, profound, and distinctive gaming elements. By leveraging the 'Easy to Learn' aspect of hyper-casual games and intertwining strategic, narrative, or aesthetic components from other genres, these hybrids not only attract a diverse player base but also introduce innovative gameplay mechanisms and creatively immersive narratives.

Looking ahead, the trajectory of development for hybrid-casual games appears promising. Game developers will continue to experiment and innovate, enhancing the experiences that games can offer. **The increasing accessibility of gaming platforms, coupled with ceaseless creativity within the gaming industry, demonstrates that hybrid-casual games will persist in their growth trajectory, significantly shaping the gaming market in the years to come.**

Christian Nguyen
Founder at [Thiết kế Game](#)



Hypercasual and casual genres have become increasingly competitive in 2023.

In this context, there is a rising trend toward the hybrid-casual genre which combines mid-core and casual game elements. I think there are a couple of these phenomena: + This genre is beneficial for monetization because of the ability to earn from both IAA and IAP. That means game studios can alleviate the burden of high CPI due to profit from IAP, leading to optimizing the profit overall. + Because the technique of the hyper-casual genre is less complex than the mid-core one, It is not too challenging for game studios to learn, research, and adapt to make hybrid-casual games. + After all, App Quality from Google Play Store restricts games that show many ads, hence it is conducive for the gaming market to move to the hybrid-casual genre that is not affected negatively by App Quality.

In conclusion, we need more resources to make a qualified hybrid-casual game than casual or hyper-casual ones. But more than that, we also hope that this new trend will bring more profit margin, and more opportunities at this challenging phase.

Nguyen Thi Thuy Ha
UA Specialist at [Gamee Studio](#)



Industry Insights

UGC NINJA

1. The main trend we should dive into for mobile marketing in 2024 is the widespread use of AI. Creating a creos through AI tools, focusing on AI in marketing creatives as a killer feature in a product and mimicking the “real” AI. Mislead in mechanics. This is a trend and you need to either ride it or chase it. Plus moving towards organic style ads.
2. For the advice for advancing user acquisition career in 2024 should focus on creatives production side and analytics team to know what to produce for great performance.
3. Considering the primary challenges in mobile game user acquisition, it’s fight for the user. Creatives are becoming more and more sophisticated, there are more and more similar titles. You need to bring the audience into your product and this will be the main challenge.
4. From creating creatives through AI tools, to creating new in-game killer features that will either increase the complexity of games or simplify the gaming session for players.
5. The rising popularity of hybrid casual games is normal, as generations of gamers are growing and standard casual gameplay is becoming too easy for them. Due to the abundance of similar titles, gamers need more variety, which leads to hybrid forms of products.

Ross Puriasev
CMO at [UGC Ninja](#)



In 2023, Generative AI took the spotlight, making advanced tools like ChatGPT, Bard, and DALL-E accessible to everyone. Mobile marketing was not an exception. Small publishers can now generate game assets for free, but the catch is the quality, which is often not up to par.

While it became easier for everyone to use these tools, it also made it tricky for creators to find the right balance between saving money and getting high-quality results. While perfection in AI tools might not be on the horizon for 2024, a surge in developers integrating AI layers into their existing setups is imminent. The potential use cases are boundless. **Picture this: you can connect your current database, say Tenjin's [DataVault](#), with ChatGPT to optimize user acquisition campaigns. The possibilities are expanding, and the synergy of existing systems with AI opens doors to limitless innovations.**

Roman Garbar
Marketing Director at [Tenjin](#)



Hybrid-casual games are filling the gap between casual and hyper-casual games beautifully.

I think demand will increase in this space since gamers are also becoming more educated and want more meta in their games. Hybrid-casual games are like a masterful recipe, combining the simplicity and instant satisfaction of casual games with elements that keep players hooked for the long haul. Hybrid-casual games are responding to the competitive landscape of the hyper-casual genre by emphasizing deeper player engagement and improved retention. **This has a direct effect on the game revenue, considering players with higher retention tend to invest in the game, increasing in-app purchase revenue.** We see that most of the hyper-casual publishers also shifted to this, while some are still maintaining and growing their hyper-casual portfolio. No matter what, competition will still be fierce in this market. However, the entry levels to this game won't be as easy as hyper-casual since making a game with casual mechanics requires more experience and funding.

Therefore, I think we will see more qualified teams with fewer games published on the market but decent competition.

Batuhan Avucan
Founder & Managing Director at [Mobicdictum](https://mobicdictum.com)



The Monetization Model focuses more on IAP. With a slowdown in hypercasual games from 2020-2022 and the inflation of global eCPM, hybrid games have been rising as a new trend in 2023 and are projected to continue in 2024. We saw a big shift from hypercasual to hybrid casual where developers started to bring other mid-core game mechanics into their games, as well as more IAP live-ops content to generate money from users instead of just heavily relying on IAA.

As a result, global CPI is also becoming higher to acquire higher-value users and generally increases UA costs while developers make less revenue from IAA. SKAD & Privacy Sandbox will change the way UAC optimizes results. UA marketers shift more budget to contextual ads & organic media channels such as influencers or ASO. After Apple introduced SKAD Network in 2018, the world stepped into the non-IDFA era. Marketers found it harder and harder to acquire a deep understanding of iOS users. Without immediate attribution signals, we found it harder to evaluate the success of a UA campaign. Marketers also have to deal with granular data more often instead of first statistic data like R1, R3, R7, or D1 ROAS to define the monetization strategy for their product with their IAA Monetize Strategy. Five years later, Google also launched Privacy Sandbox, which functions similarly to SKAD Network and would make it harder for UA marketers all over the world to operate their UA campaign, especially targeting deep funnel CPA campaigns.

Halley Nguyen
UA Manager at [AnyMind Group](#)



01

Charts of Top Global Mobile Games



2023 Top Mobile Games by Advertising | iOS TOP 30

| | | | | | | | | | | | |
|----|--|---|--------|----|--|------------------------------------|-------|----|--|---|--------|
| 1 | | Mighty Party Panoramik Games | RPG | 11 | | 鬼武三國 Miao Game | RPG | 21 | | Ragnarok Origin Global Gravity Corporation | RPG |
| 2 | | Block Blast Hungry Studio | Puzzle | 12 | | Whiteout Survival Century Games | SLG | 22 | | Thái Cổ Phong Ma TTH PLAY | RPG |
| 3 | | 合金彈頭：覺醒 VNG & Tencent | RPG | 13 | | Call of Dragons Lilith Games | SLG | 23 | | The Ants StarUnion | SLG |
| 4 | | Royal Match Dream Games | Casual | 14 | | Resortopia DHGames | SIM | 24 | | Jackpot World™ Bole Games | Casino |
| 5 | | 1945 ONESOFT | Casual | 15 | | X-HERO Bingchuan Network | RPG | 25 | | Rise of Kingdoms Lilith Games | SLG |
| 6 | | Evony Top Games | SLG | 16 | | おねがい社長！ EWORLD | SIM | 26 | | 戀戀清庭：邂逅 Ludoo Games | SIM |
| 7 | | Block Puzzle Doodle Mobile | Puzzle | 17 | | MONOPOLY GO! Scopely | Board | 27 | | 歡樂大東家 EWORLD | SIM |
| 8 | | Demon Hunter: Rebirth Coding Code | RPG | 18 | | Rise of Empires IM30 | SLG | 28 | | Survivor!.io Habby | Action |
| 9 | | Revelation: New World VNG & NetEase | RPG | 19 | | Mafia City Yotta Games | SLG | 29 | | 天命三國志 HotGame Center | RPG |
| 10 | | Play Rummy Passion Cash Games Passion Gaming Private Limited | Casino | 20 | | Stormshot FunPlus | SLG | 30 | | Kung Fu Saga 4399 | RPG |

Source: SocialPeta - APP Intelligence, Advertiser Analysis; advertisers are sorted (from high to low) by the numbers of their deduplicated creatives within the date range. Date Range: Jan. - Dec. 2023; if one product is ranked on several charts, the higher ranking prevails.



Top Mobile Games by Downloads & Revenue | App Store

Download Chart

Revenue Chart

| | | | | | | | | | | | |
|----|-------------------------------------|-----------|----|---|-----------|----|-------------------------------------|-----------|----|---|-----------|
| 1 | Roblox Roblox Corporation | Adventure | 11 | Among Us! InnerSloth | Action | 1 | Candy Crush Saga King | Casual | 11 | プロ野球スピリッツA KONAMI | Sports |
| 2 | Royal Match Dream Games | Casual | 12 | Bridge Race Supersonic | Casual | 2 | Royal Match Dream Games | Casual | 12 | Honkai: Star Rail miHoYo | RPG |
| 3 | MONOPOLY GO! Scopely | Board | 13 | Honkai: Star Rail miHoYo | RPG | 3 | Roblox Roblox Corporation | Adventure | 13 | PUBG MOBILE Tencent | Action |
| 4 | Subway Surfers Sybo Games | Arcade | 14 | Free Fire Garena | Adventure | 4 | モンスターストライク XFLAG | RPG | 14 | Clash of Clans Supercell | Action |
| 5 | Gardenscapes Playrix | Casual | 15 | Call of Duty@: Mobile Activision Blizzard & Tencent | Action | 5 | MONOPOLY GO! Scopely | Board | 15 | ウマ娘 プリティーダービー Cygames | Adventure |
| 6 | Block Blast Hungry Studio | Puzzle | 16 | EA SPORTS FC™ Mobile Soccer Electronic Arts | Sports | 6 | Pokémon GO Niantic | SLG | 16 | Fate/Grand Order Aniplex | Card |
| 7 | 8 Ball Pool™ Miniclip | Sports | 17 | PUBG MOBILE Tencent | Action | 7 | Gardenscapes Playrix | Casual | 17 | Call of Duty@: Mobile Activision Blizzard & Tencent | Action |
| 8 | Magic Tiles 3 Amanotes | Music | 18 | Fishdom Playrix | Puzzle | 8 | Coin Master Moon Active | Adventure | 18 | パズル&ドラゴンズ GungHo | Puzzle |
| 9 | Candy Crush Saga King | Casual | 19 | UNO!™ Mattel163 | Party | 9 | Genshin Impact miHoYo | RPG | 19 | Township Playrix | SIM |
| 10 | My Perfect Hotel SayGames | Arcade | 20 | Stumble Guys Scopely | Casual | 10 | Homescapes Playrix | Puzzle | 20 | Whiteout Survival Century Games | SLG |



2023 Top Mobile Games by Advertising | Android TOP 30

| | | | | | | | | | | | |
|----|--|---|--------|----|--|--|--------|----|--|--|--------|
| 1 | | Epic Heroes Bingchuan Network | RPG | 11 | | Comino AB Tiger Online Halim Pranatha Hoesni | Casual | 21 | | Alice's Dream: Merge Island Newborn Town | Puzzle |
| 2 | | Mighty Party Panoramik Games | RPG | 12 | | Last Fortress IM30 | SLG | 22 | | Braindom Matchingham Games | Puzzle |
| 3 | | Jhandi Munda King Brian Leach | Casino | 13 | | Ludo Flying Chess shivkumar | Board | 23 | | Weapon Craft Run Rollic Games | Casual |
| 4 | | Block Blast Hungry Studio | Puzzle | 14 | | Jackpot World™ Bole Games | Casino | 24 | | 花舞宫廷 Origin Mood | RPG |
| 5 | | The Grand Mafia Yotta Games | SLG | 15 | | Mafia City Yotta Games | SLG | 25 | | Jhandi Munda King Yogesh kumari | Casino |
| 6 | | Evony Top Games | SLG | 16 | | Jhandi Munda King KAMLESH | Casino | 26 | | super mouse Mukhamed Tsintskaladze | Casual |
| 7 | | Lightning Link Casino Slots Product Madness | Casino | 17 | | Ragnarok Origin Global Gravity Corporation | RPG | 27 | | State of Survival FunPlus | SLG |
| 8 | | Dragonscapes Adventure Century Games | SIM | 18 | | Whiteout Survival Century Games | SLG | 28 | | Sky Utopia JunHai Games | RPG |
| 9 | | Word Search Block Puzzle Game Pandas of Caribbean | Word | 19 | | 1945 Air Force ONESOFT | Casual | 29 | | Call of Dragons Lilith Games | SLG |
| 10 | | Lords Mobile IGG | SLG | 20 | | Plinko BallX 2 YanaSemchuk | Arcade | 30 | | Stormshot FunPlus | SLG |

Source: SocialPeta - APP Intelligence, Advertiser Analysis; advertisers are sorted (from high to low) by the numbers of their deduplicated creatives within the date range. Date Range: Jan. - Dec. 2023; if one product is ranked on several charts, the higher ranking prevails.



Top Mobile Games by Downloads & Revenue | Google Play

Download Chart

Revenue Chart

| | | | | | | | | | | | |
|----|---------------------------------------|-----------|----|--|----------|----|------------------------------|-----------|----|--------------------------------------|--------|
| 1 | Subway Surfers Sybo Games | Arcade | 11 | My Talking Tom Friends Jinke Tom | Casual | 1 | Coin Master Moon Active | Casual | 11 | Township Playrix | Casual |
| 2 | Ludo King™ Gametion | Board | 12 | Going Balls Supersonic | Casual | 2 | Candy Crush Saga King | Casual | 12 | Homescapes Playrix | Casual |
| 3 | Roblox Roblox Corporation | Adventure | 13 | 8 Ball Pool Miniclip | Sports | 3 | 리니지M NCSOFT | RPG | 13 | Honkai: Star Rail miHoYo | RPG |
| 4 | Candy Crush Saga King | Casual | 14 | Bridge Race Supersonic | Casual | 4 | Roblox Roblox Corporation | Adventure | 14 | Evony Top Games | SLG |
| 5 | Free Fire Garena | Action | 15 | Hill Climb Racing Fingersoft | Optional | 5 | Royal Match Dream Games | Puzzle | 15 | 오딘: 발할라 라이징 Kakao Games | RPG |
| 6 | Block Blast Hungry Studio | Puzzle | 16 | EA SPORTS FC™ Mobile Soccer Electronic Arts | Sports | 6 | Gardenscapes Playrix | Casual | 16 | Fishdom Playrix | Puzzle |
| 7 | My Talking Tom 2 Jinke Tom | Casual | 17 | Indian Bikes Driving 3D Rohit Gaming Studio | SIM | 7 | Genshin Impact miHoYo | Adventure | 17 | 나이트 크로우 Wemade | RPG |
| 8 | Race Master 3D SayGames | Racing | 18 | Car Race 3D: Car Racing Zego Studio | Racing | 8 | Pokémon GO Niantic | Adventure | 18 | PUBG MOBILE Tencent | Action |
| 9 | Football League 2024 MOBILE SOCCER | Sports | 19 | My Talking Angela 2 Jinke Tom | Casual | 9 | MONOPOLY GO! Scopely | Board | 19 | GODDESS OF VICTORY: NIKKE Tencent | RPG |
| 10 | Royal Match Dream Games | Puzzle | 20 | Free Fire MAX Garena | Action | 10 | Lineage W NCSOFT | RPG | 20 | Clash of Clans Supercell | SLG |

Source: SocialPeta - App Intelligence; excluding data from any third-party Android platforms.
Date Range: Jan. - Dec. 2023; if one product is ranked on several charts, the higher ranking prevails.

Global Mobile Game Companies by Advertising Top 20

| # | Company Name | | Number of Advertisers | Major Game Advertisers | # | Company Name | | Number of Advertisers | Major Game Advertisers |
|----|-------------------|--|-----------------------|------------------------|----|--------------------------|--|-----------------------|------------------------|
| 1 | Rollic Games | | 221 | | 11 | FunPlus | | 25 | |
| 2 | Bingchuan Network | | 12 | | 12 | Azur Interactive Games | | 216 | |
| 3 | Century Games | | 22 | | 13 | Playrix | | 23 | |
| 4 | Bole Games | | 15 | | 14 | Pandas of Caribbean | | 22 | |
| 5 | VOODOO | | 214 | | 15 | Green Panda Games | | 34 | |
| 6 | JunHai Games | | 29 | | 16 | Zynga | | 61 | |
| 7 | Guru Puzzle Game | | 26 | | 17 | SayGames | | 149 | |
| 8 | Homa | | 57 | | 18 | Aged Studio | | 43 | |
| 9 | Yotta Games | | 16 | | 19 | ONESOFT | | 20 | |
| 10 | IGG | | 38 | | 20 | Level Infinite (Tencent) | | 45 | |

Source: SocialPeta - Company Analysis; companies are sorted by their products' total deduplicated creatives from high to low.
 Each game is counted as an advertiser.
 Date Range: Jan. - Dec. 2023

Global Websites of Advertisers on Platforms TOP 10

facebook

| # | Website |
|----|--|
| 1 | Rollic @rollic |
| 2 | Mighty Party @mightyparty.game |
| 3 | Squirrel Games |
| 4 | Monday OFF @MondayOffGame |
| 5 | Dinosaur-Games |
| 6 | Red Carpet Games |
| 7 | PR1 @winterwolfpaios |
| 8 | Jackpot World Casino @JackpotWorldCasinoNetmarble |
| 9 | SayGames @saygames.fb |
| 10 | Evony @Evony.The.Kings.Return |

Google

| # | Website |
|----|--|
| 1 | Wargaming Group Limited ▼Cyprus |
| 2 | Play Games24x7 Pvt. Ltd. ▼India |
| 3 | Nexters Global Ltd. ▼Cyprus |
| 4 | Yojoy Network Technology Co., Limited ▼Hong Kong (China) |
| 5 | 2K Games, Inc. ▼U.S. |
| 6 | COGNOSPHERE PTE. LTD. ▼Singapore |
| 7 | 遊戲橘子數位科技股份有限公司 ▼Taiwan (China) |
| 8 | MY.GAMES B.V. ▼Netherlands |
| 9 | Zego Global PTE. LTD ▼Singapore |
| 10 | Vei Comunicación Cooperativa de Trabajo Limitada ▼Argentina |

TikTok

| # | Website |
|----|--|
| 1 | SUPERSONIC STUDIOS LTD ▼Israel |
| 2 | VOODOO ▼France |
| 3 | HOMA GAMES ▼France |
| 4 | Azur Interactive Games Limited ▼U.K. |
| 5 | COGNOSPHERE PTE. LTD. ▼Singapore |
| 6 | MATCHINGHAM GAMES LIMITED ▼U.K. |
| 7 | EYEWIND LIMITED ▼Hong Kong (China) |
| 8 | MULTICAST GAMES LIMITED ▼Cyprus |
| 9 | WESTLAKE TECHNOLOGIES CO., PTE. LTD. ▼China |
| 10 | MY.GAMES B.V. ▼Netherlands |



02

OVERALL TRENDS IN GLOBAL MOBILE GAME MARKETING

Chapter Highlights

/ 01

Over 40K monthly active advertisers, up nearly 50% YoY

There were over 40K monthly mobile game advertisers in 2023, up nearly 50% YoY. Similar to the trends in 2022, most media buying activities were at the beginning of the year and in May and June.

/ 02

Southeast Asia was the most competitive market in terms of mobile games marketing in 2023

Southeast Asia surpassed Oceania to come in third with its monthly mobile game advertisers, and had 135 monthly creatives per advertiser, the highest among all regions.

/ 03

SLG game marketing slumped while casino game marketing surged

SLG game advertisers remained stable as compared to 2022, but SLG game creatives accounted for a decline of 2.08%. Casino game advertisers and creatives both accounted for an increase of over 1%.



Advertising Trends in Global Mobile Games in 2023

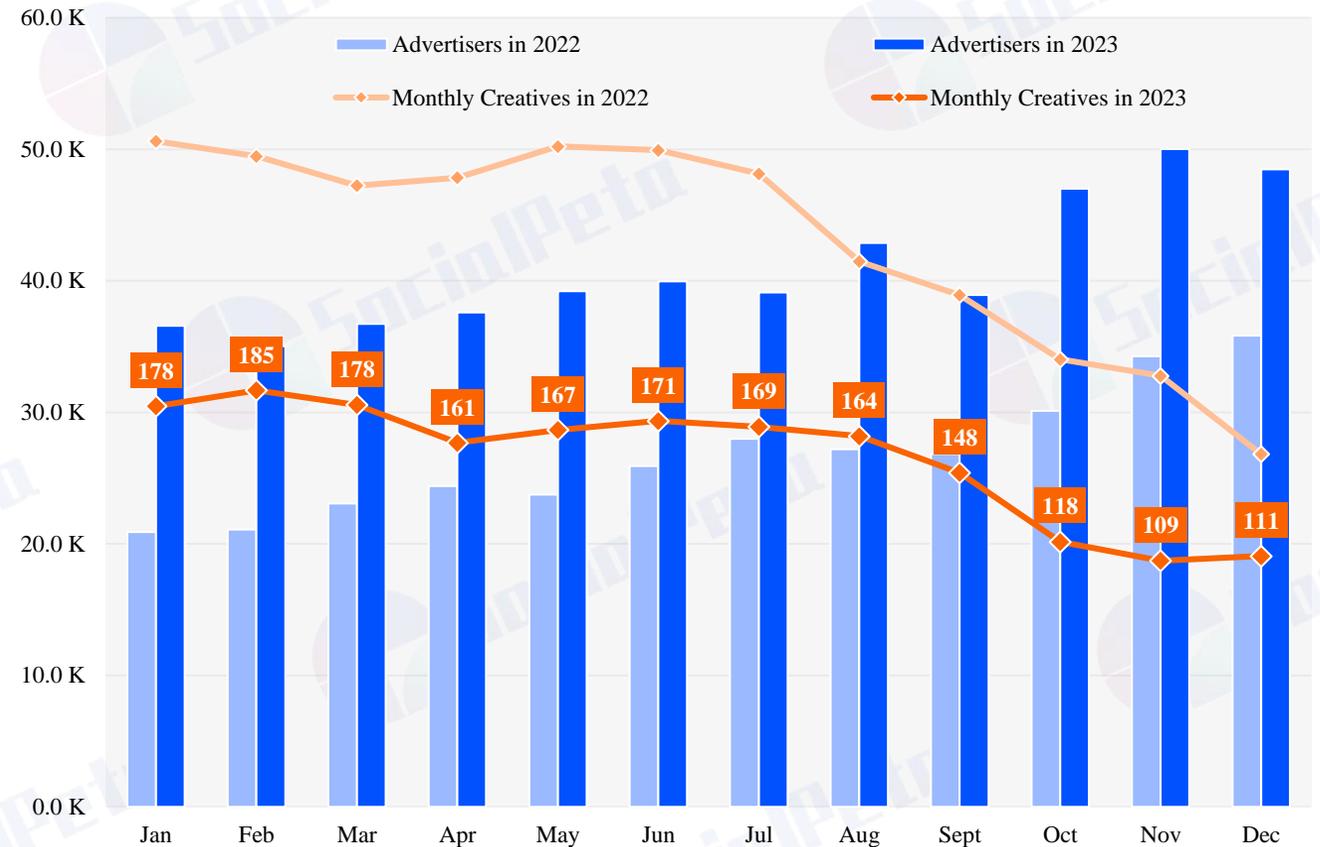
There were over 40K monthly advertisers, up nearly 50% YoY. Similar to the trends in 2022, most media buying activities were at the beginning of the year and in May and June.

Monthly Active Advertisers

40.1 K YoY **49.6%↑**

Monthly Creatives

155 YoY **36.5%↓**



Marketing Insights into Global Mobile Games in 2023

Increasingly high quality was expected from creatives by the market, so advertisers had to keep releasing new creatives to attract players.

- In 2023, over 56K advertisers per quarter released new creatives, up 51% YoY, and there were over 60K advertisers with new creatives in Q4.
- The percentage of new creatives increased quarter by quarter to nearly 80% in the second half of the year.



Quarterly advertisers with new creatives

56.5 K **90.57%**

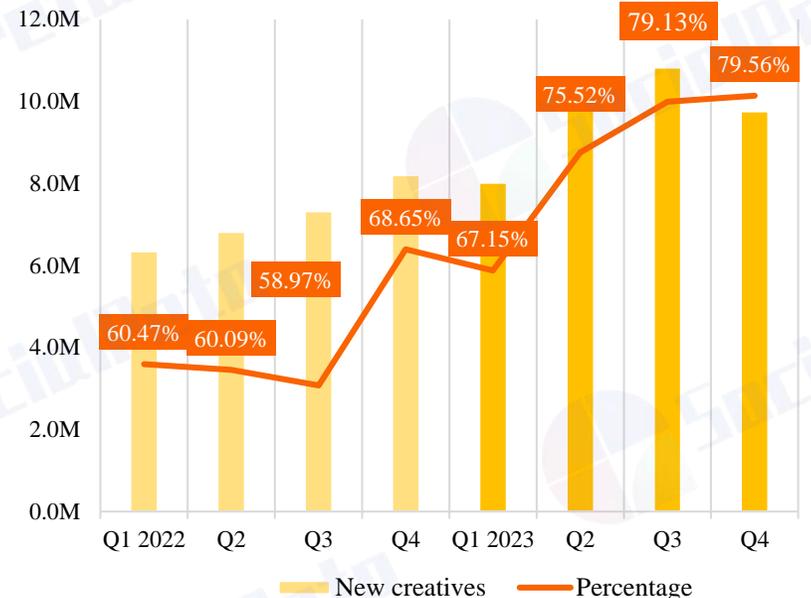
Average percentage



Quarterly new creatives

9.66 M **75.34%**

Average percentage



Marketing Insights into Mobile Games in Different Regions in 2023

Southeast Asia was the most competitive market in terms of advertising in 2023:

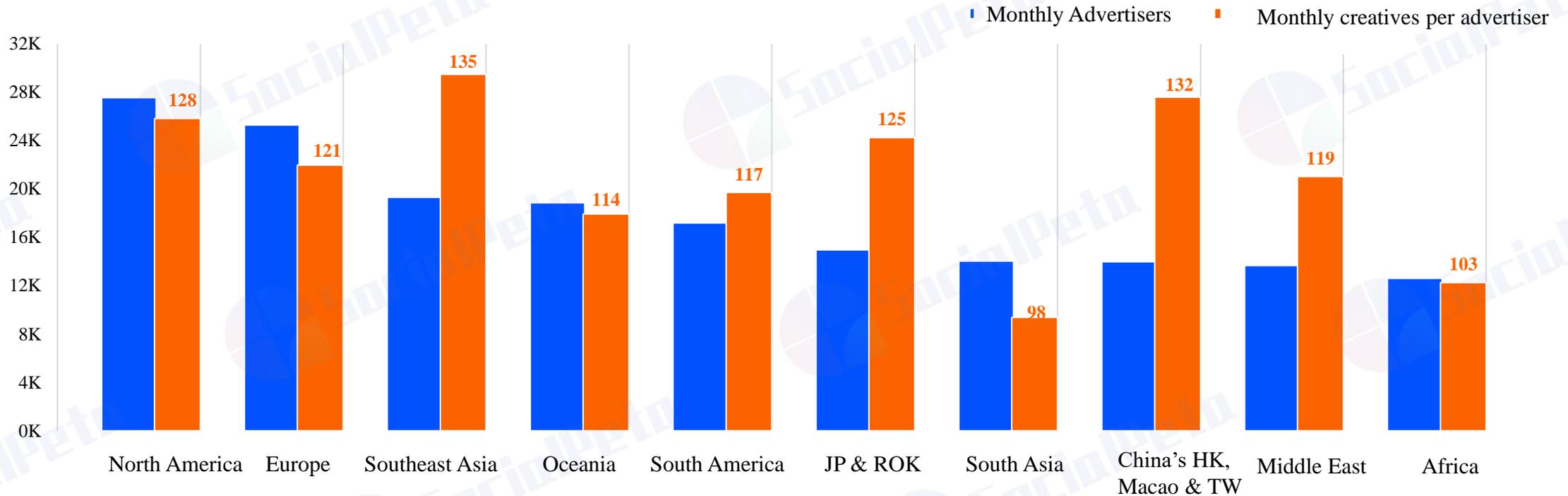
- The region **surpassed Oceania to become the No.3** with its monthly advertisers;
- It had 135 monthly creatives per advertiser, **the highest among all regions.**

Monthly Advertisers in North America: 27.6K

North America reported the highest number of game advertisers again, 2000 higher than that in Europe which came in second. Southeast Asia surpassed Oceania to come in third.

Monthly Creatives in Southeast Asia: 135

Southeast Asia had the highest monthly creatives per advertiser, followed by China's HK, Macao & TW. Both of them recorded over 130 monthly creatives per advertiser.



Advertising Insights into Mobile Games by Genre in 2023

Casual game advertisers and creatives remained to account for the highest percentages; SLG games recorded a downward trend in advertising in 2023, with creatives accounting for a decline of 2.08% as compared to 2022.

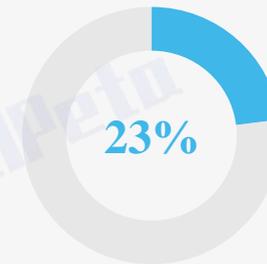
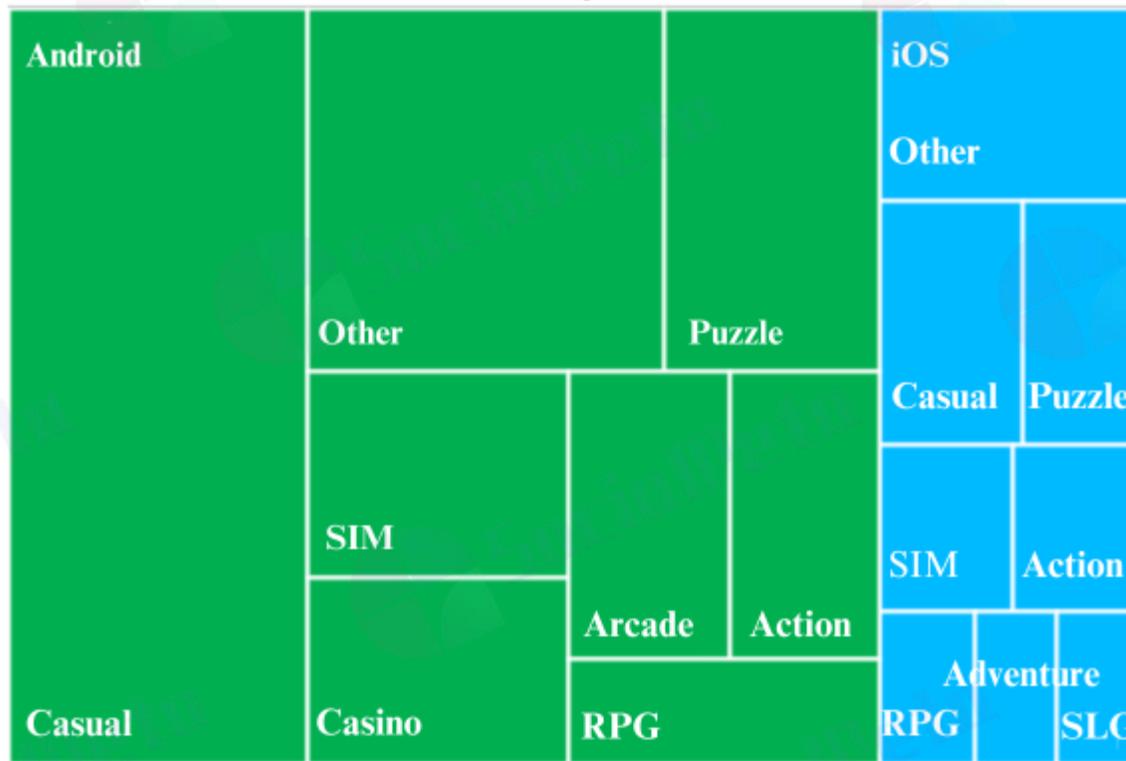
| Genre | % of Advertisers | YoY | Region with the Highest % |
|-----------|------------------|---------------|-------------------------------|
| Casual | 29.38% | 0.94% | South America, 32.90% |
| Puzzle | 12.52% | 0.80% | North America, 13.19% |
| SIM | 9.18% | 0.03% | JP & ROK, 10.81% |
| Action | 7.83% | -0.92% | Middle East, 8.30% |
| Casino | 6.23% | 1.90% | South America, 6.56% |
| RPG | 5.71% | -0.49% | JP & ROK, 7.69% |
| Arcade | 5.02% | -0.97% | North America, 5.91% |
| SLG | 4.34% | 0.00% | China's HK, Macao & TW, 5.11% |
| Card | 3.98% | -0.18% | South Asia, 5.08% |
| Adventure | 3.98% | -0.43% | Europe, 4.10% |

| Genre | % of Creatives | YoY | Region with the Highest % |
|-----------|----------------|---------------|--------------------------------|
| Casual | 32.51% | 9.50% | South America, 36.11% |
| Puzzle | 11.18% | -1.18% | Africa, 14.89% |
| RPG | 10.20% | -1.23% | China's HK, Macao & TW, 13.08% |
| SIM | 7.54% | -1.19% | JP & ROK, 10.32% |
| Casino | 6.85% | 1.25% | South America, 8.75% |
| SLG | 6.59% | -2.08% | Middle East, 8.69% |
| Action | 5.68% | -1.21% | China's HK, Macao & TW, 7.43% |
| Card | 5.07% | -0.12% | South Asia, 8.10% |
| Arcade | 3.30% | 0.50% | Europe, 3.88% |
| Adventure | 2.88% | -1.82% | China's HK, Macao & TW, 3.22% |

Advertising Insights into Mobile Games on iOS & Android in 2023

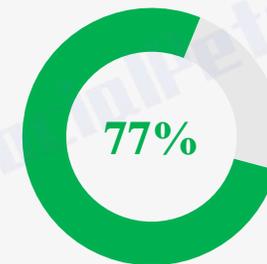
On Android, casual game advertisers accounted for over 1/4 of total advertisers, and casual, puzzle, and SIM advertisers accounted for the top 3 biggest shares.

% of Advertisers by Genre in 2023



% of Advertisers on iOS

Mid-core and hard-core game advertisers accounted for a much higher percentage on iOS than on Android.

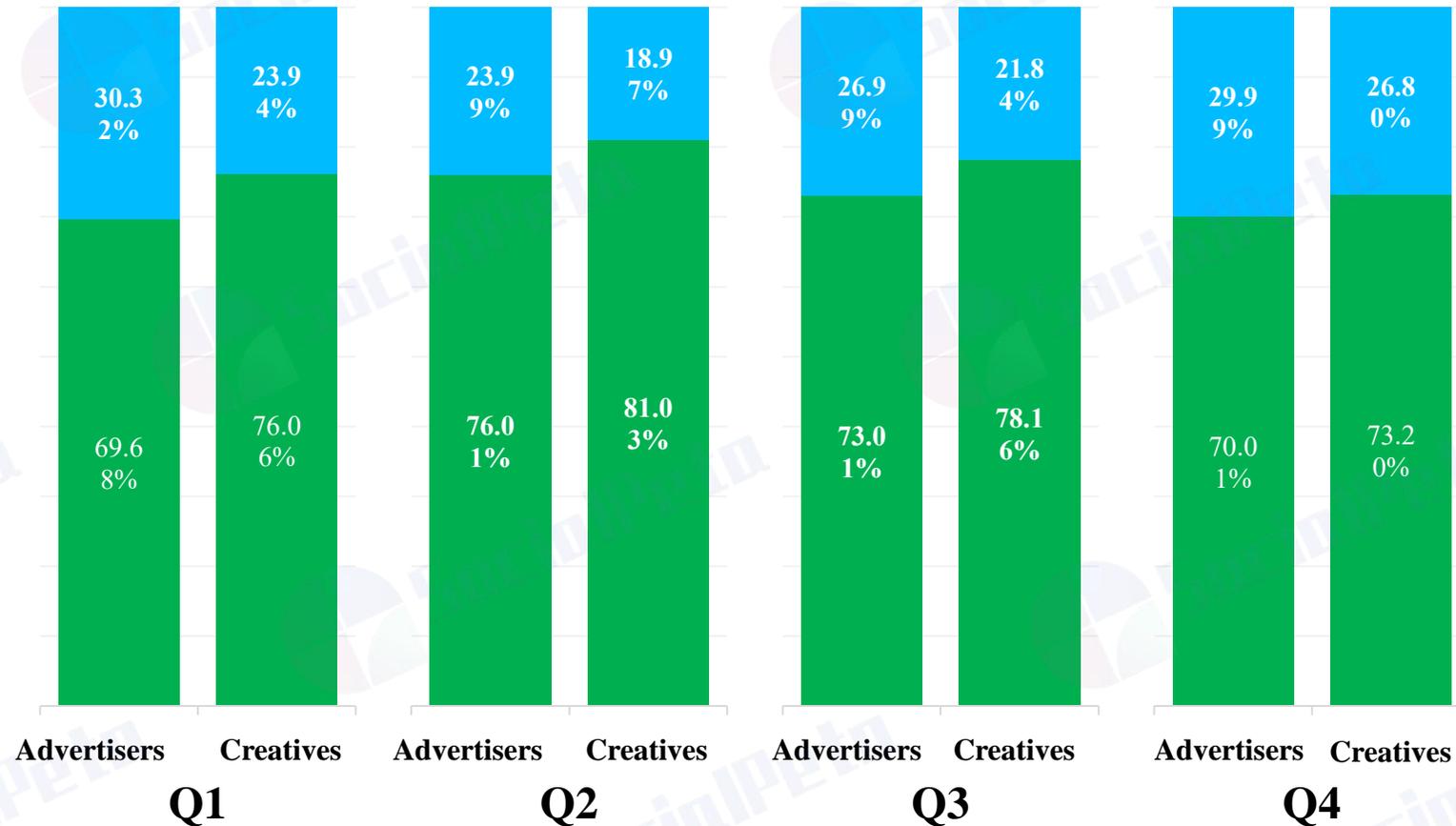


% of Advertisers on Android

On Android, the number of casual game advertisers was over 6 times that on iOS, and the number of RPG advertisers was over twice that on iOS.

Advertising Insights into Mobile Games by Genre in 2023

Advertisers on iOS accounted for less than 30% in all quarters except for Q1 2023. Creatives per quarter on Android were 35% more than on iOS.



Creatives per quarter on iOS

177

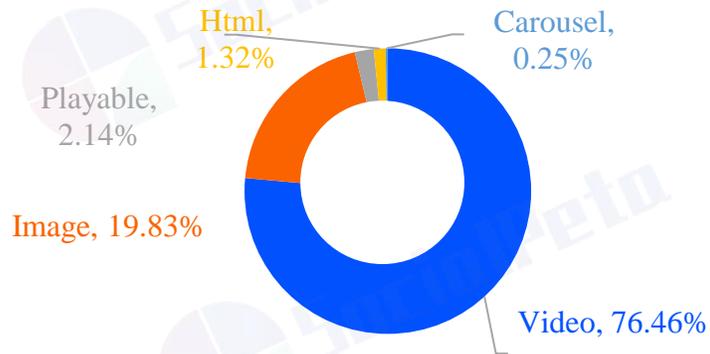


Creatives per quarter on Android

239

Mobile Game Creatives by Type

% of creatives by type in 2023



Estimated average impressions of mobile game creatives in 2023

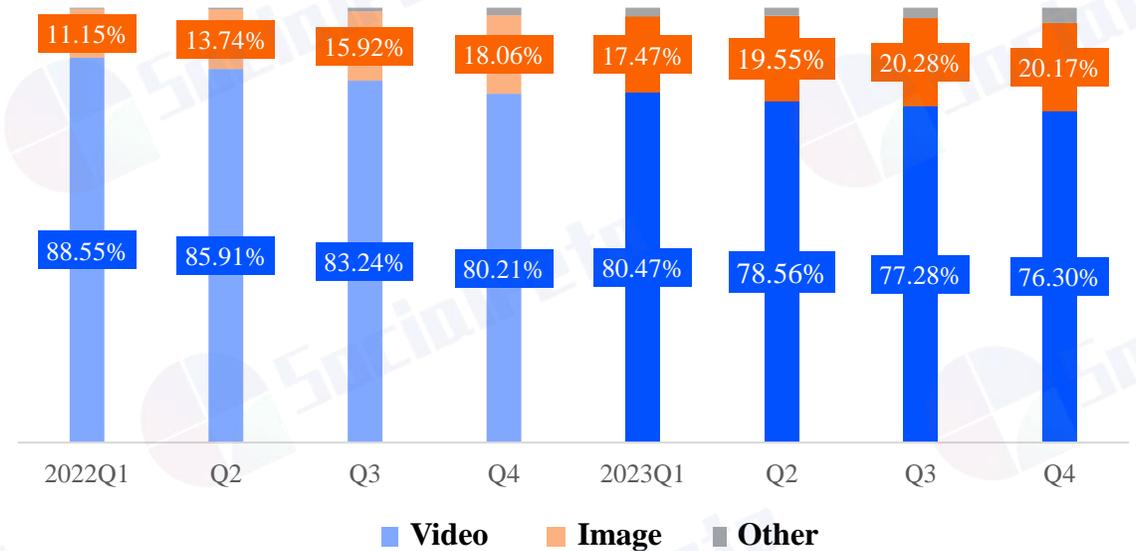
140.5K

iOS: 220.5K

Android: 128.4K

% of impressions of video and image creatives for mobile games

- Impressions of video creatives accounted for an increasingly smaller share.
- Thanks to AIGC, image creatives were gaining popularity again, leading to a bigger share of impressions.



% of Game Ad Creatives by Type in 2023

Nearly 80% of video creatives were 30 seconds or less in length, and square image creatives accounted for over 50%.

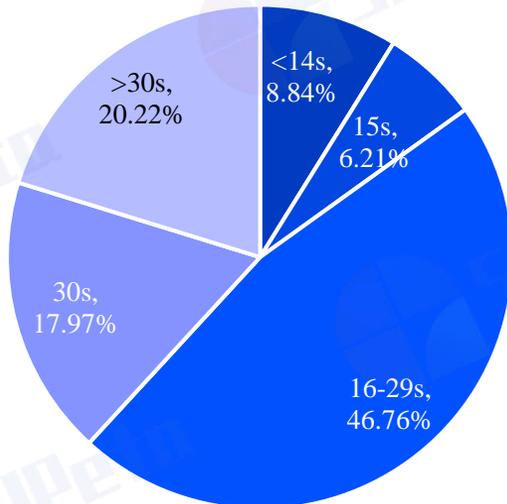
Top video creatives by length:

30s, 15s, 29s

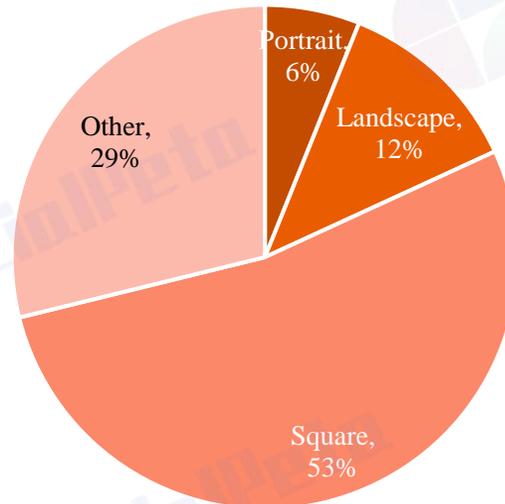
Top image creatives by resolution:

1080 x 1080
600 x 600
800 x 800

% of video creatives by length



% of image creatives by format



| Common lengths of video creatives | | Common resolutions of image creatives | |
|-----------------------------------|--------|---------------------------------------|--------|
| 30s | 17.97% | 1080 x 1080 | 22.69% |
| 15s | 6.21% | 600 x 600 | 17.26% |
| 29s | 5.66% | 800 x 800 | 12.99% |
| 28s | 4.34% | 1200 x 628 | 7.46% |
| 25s | 4.20% | 1200 x 1200 | 5.00% |
| 27s | 3.85% | 1000 x 1000 | 3.84% |
| 26s | 3.76% | 1080 x 1920 | 3.07% |
| 20s | 3.75% | 338 x 600 | 2.03% |
| 24s | 3.44% | 600 x 314 | 1.63% |
| 23s | 3.21% | 1920 x 1080 | 1.29% |

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



03

Marketing Insights into Top Mobile Gaming Markets

Chapter Highlights

/ 01

2023 saw a steady rise in global advertisers

The USA had over 26K monthly game advertisers.

Southeast Asia had over 19K monthly game advertisers.

South America had over 17K monthly game advertisers.

China's Hong Kong, Macao & Taiwan had over 14K monthly game advertisers.

Middle East had over 14K monthly game advertisers.

Japan had over 13K monthly game advertisers.

/ 02

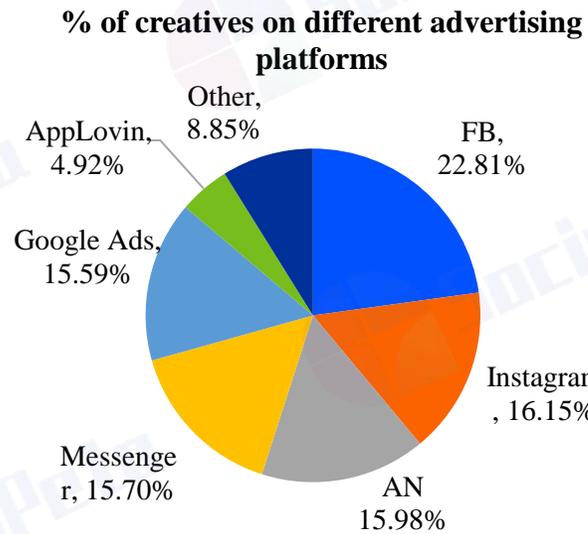
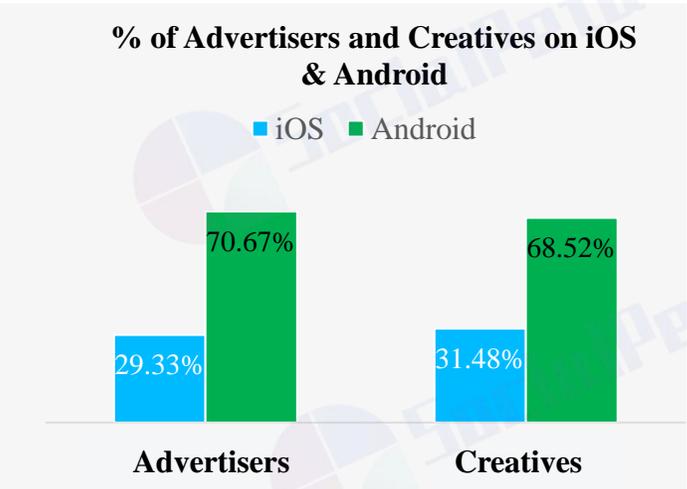
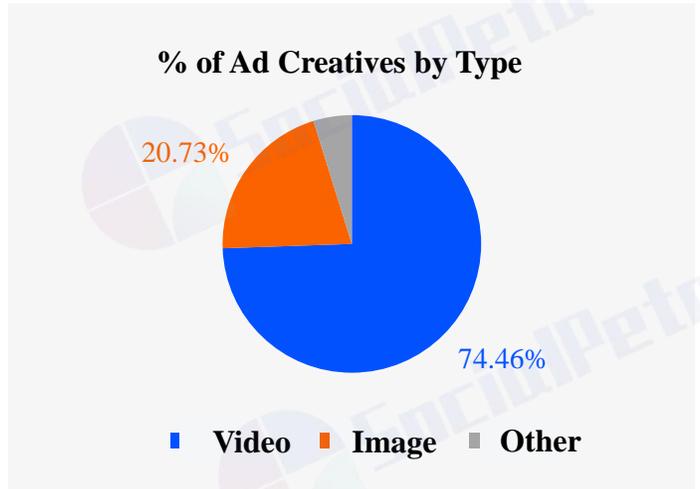
Nearly 60% of advertisers globally released new creatives every month

Japan and China's Hong Kong, Macao & Taiwan accounted for nearly 40% of iOS game advertisers, while South Korea and Southeast Asia had a dominating share of Android ad creatives.

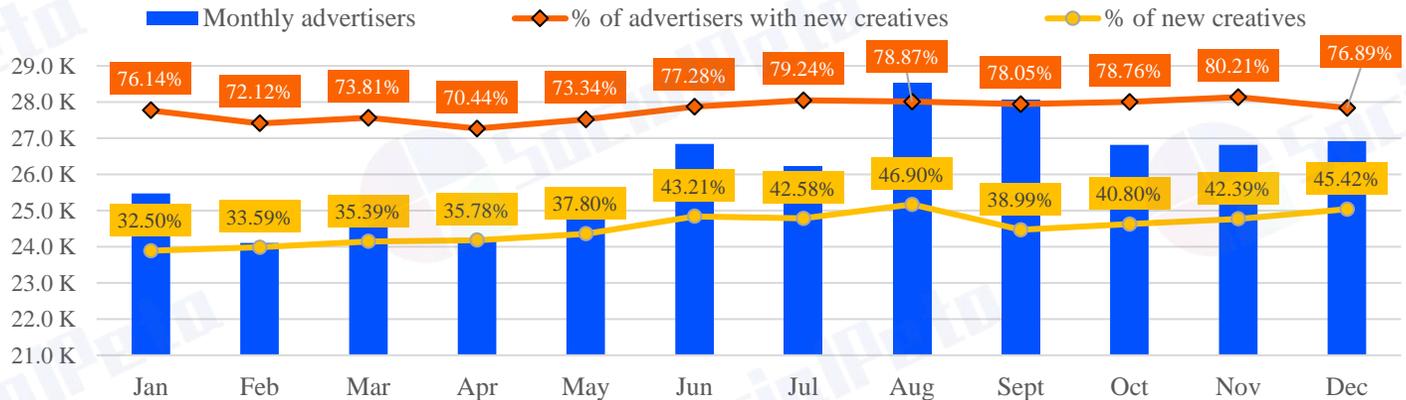


Advertising Insights into American Gaming Market in 2023

- The U.S. had over 26K monthly game advertisers, among the world's highest.
- The U.S. accounted for an amazingly big share of advertising on Android.
- The number of advertisers was generally on the decline, rebounding significantly in March, June, and August, and doing better in the 2nd half of the year than in the 1st half.

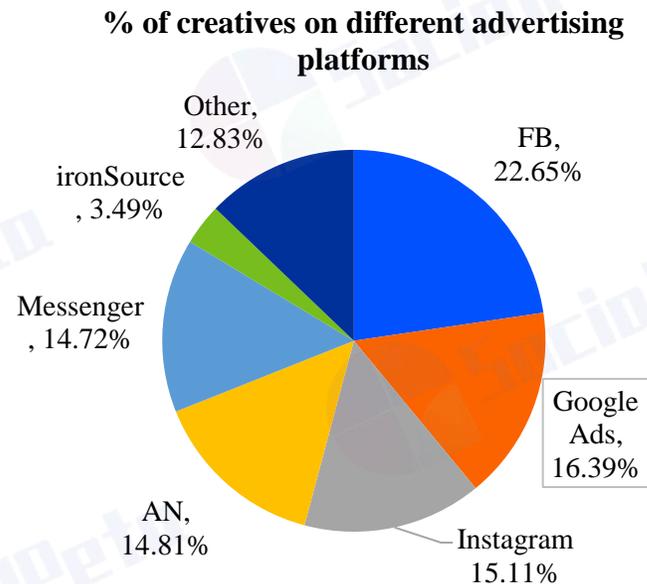
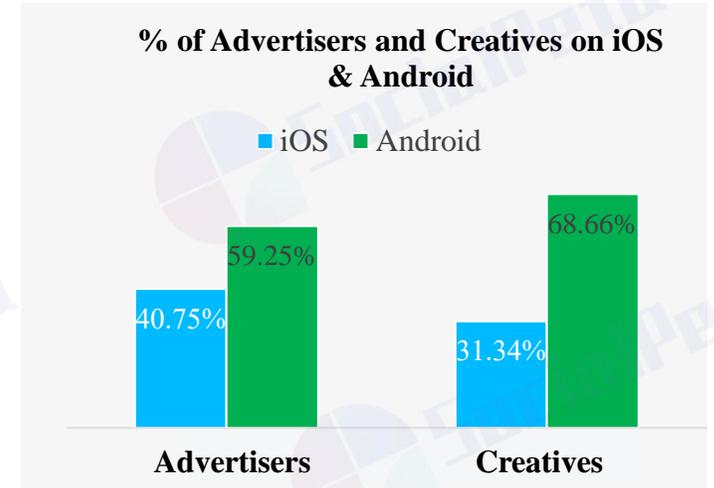
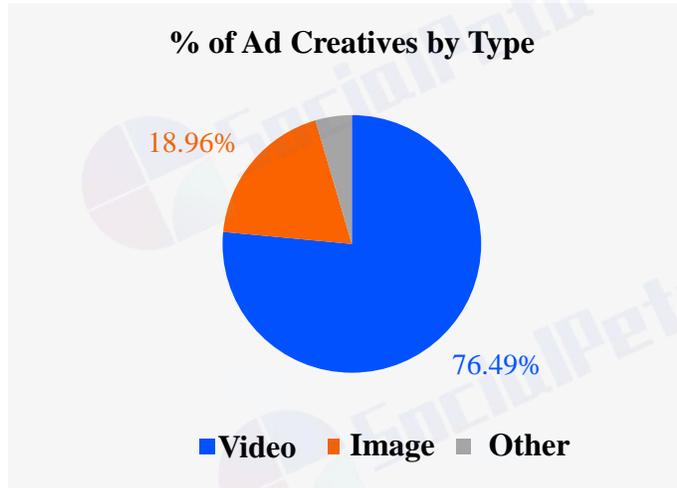


Advertising Trends in American Mobile Games

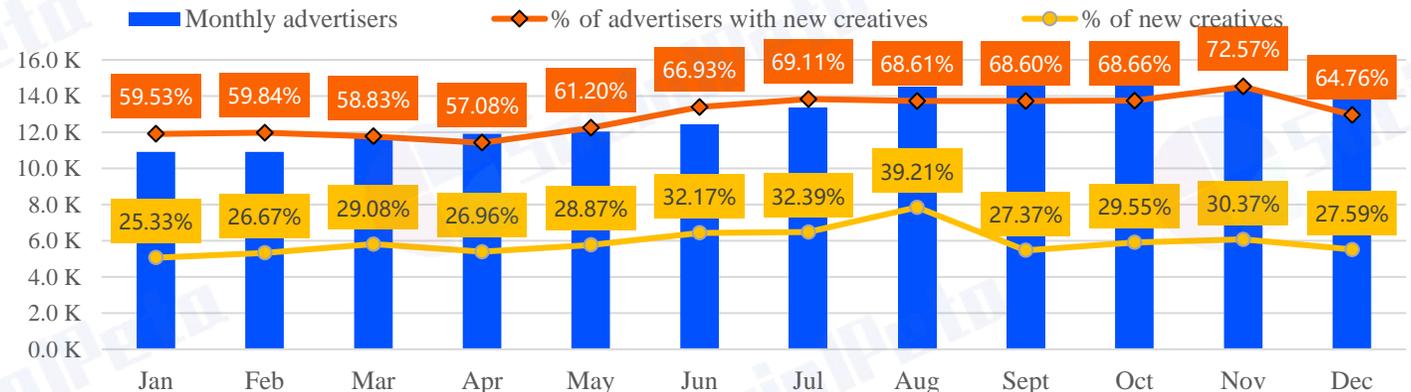


Advertising Insights into Japanese Gaming Market in 2023

- Japan had over 13K monthly game advertisers.
- In the Japanese gaming market, there was an increasing polarization as old games increased and new games sharply dropped.
- Due to “Galapagosization”, a term of Japanese origin referring to an excessive focus on the local market, Japan had over 40% iOS game advertisers, the highest globally.



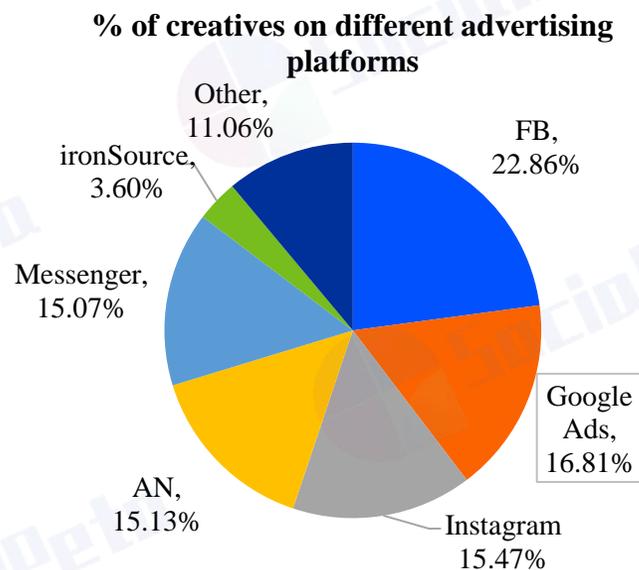
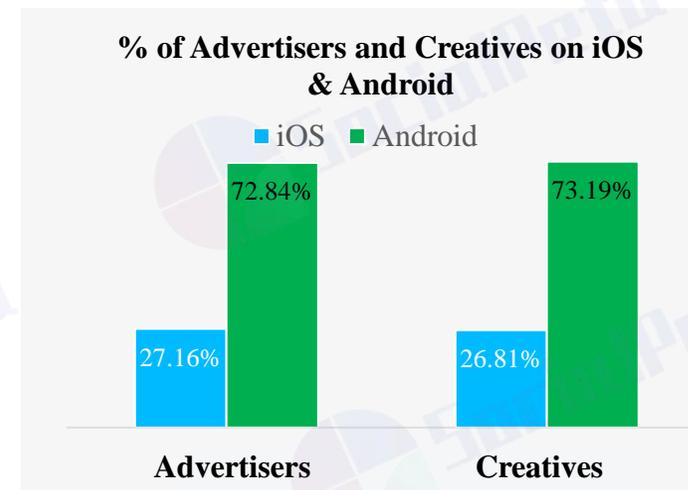
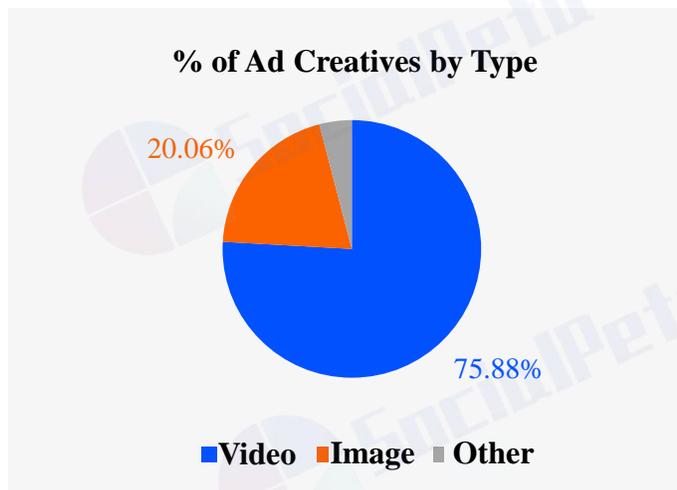
Advertising Trends in Japanese Mobile Games



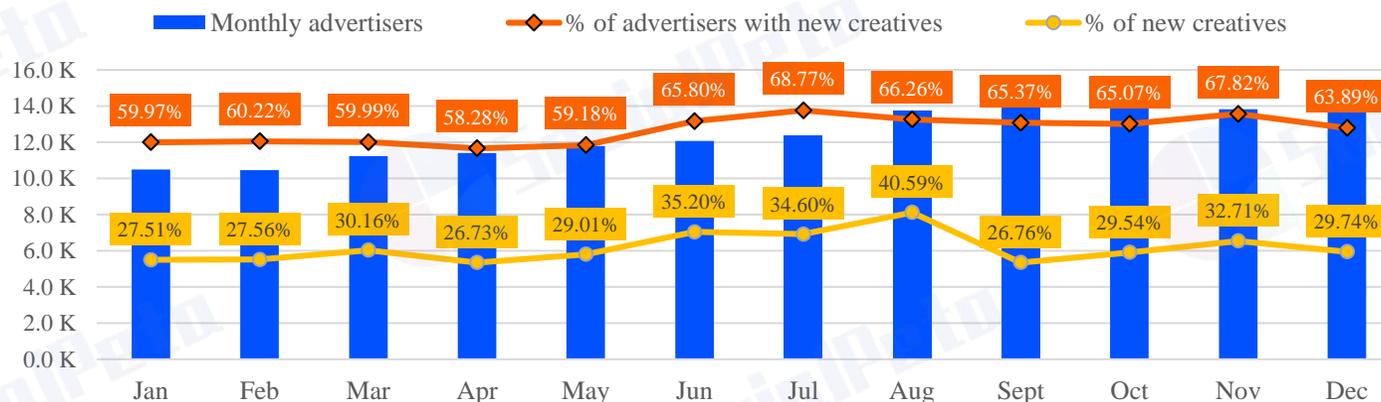
Source: SocialPeta – Advertising Intelligence, Country/Region Analysis; the data were analyzed and sorted.
Date Range: Jan. - Dec. 2023

Advertising Insights into South Korean Gaming Market in 2023

- South Korea had over 12K monthly game advertisers.
- Thanks to the growth of Samsung's mobile phones, South Korea recorded the highest percentages of Android advertisers and creatives in the world.
- In 2023, South Korea reported a steady rise in the number of advertisers.

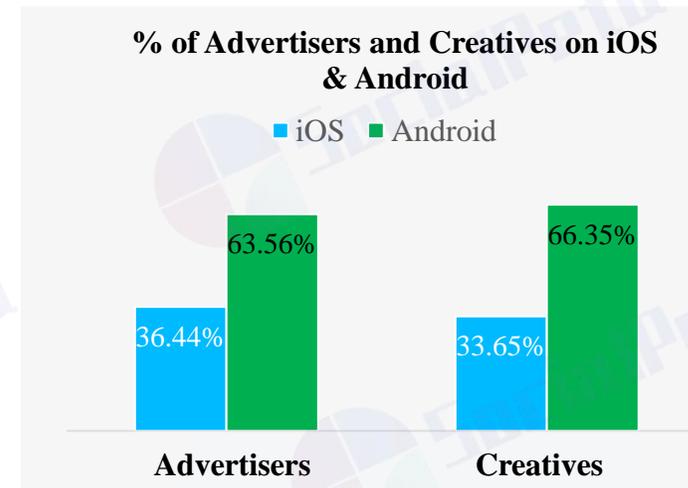
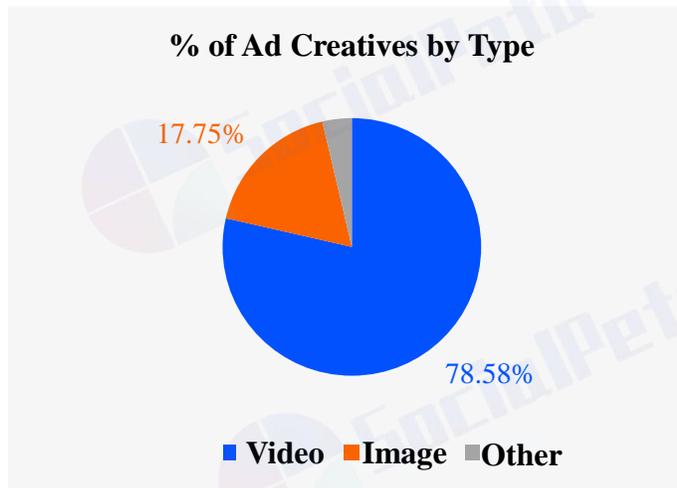


Advertising Trends in South Korean Mobile Games

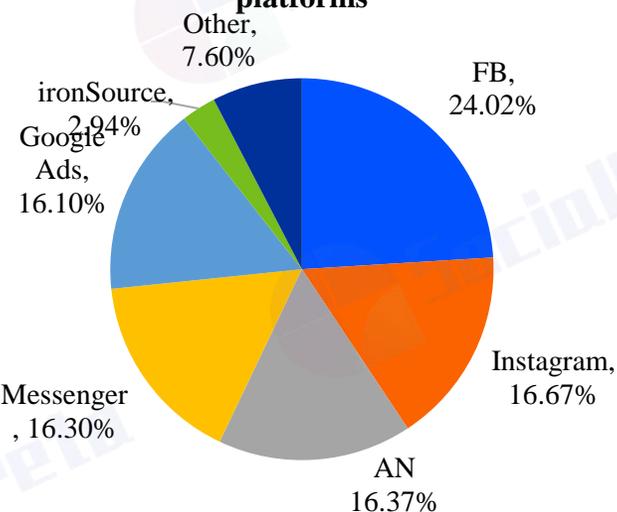


Advertising Insights into the Gaming Market of China's Hong Kong, Macao & Taiwan in 2023

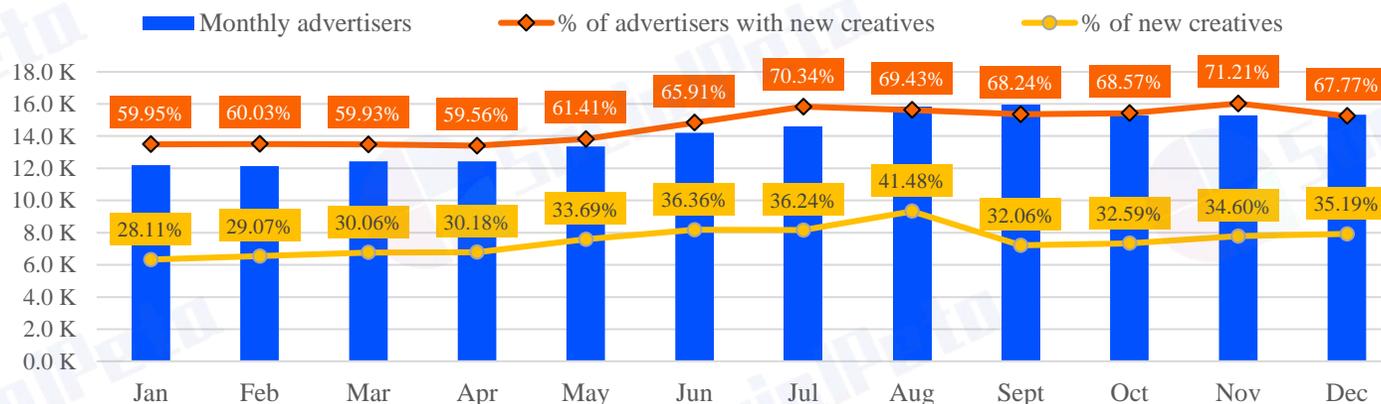
- China's Hong Kong, Macao & Taiwan had nearly 14K monthly game advertisers.
- Taiwan (China) topped the others with its advertisers and Hong Kong (China) released the most ad creatives.
- Overall, the number of advertisers was on a steadily rising trend and peaked in September.



% of creatives on different advertising platforms

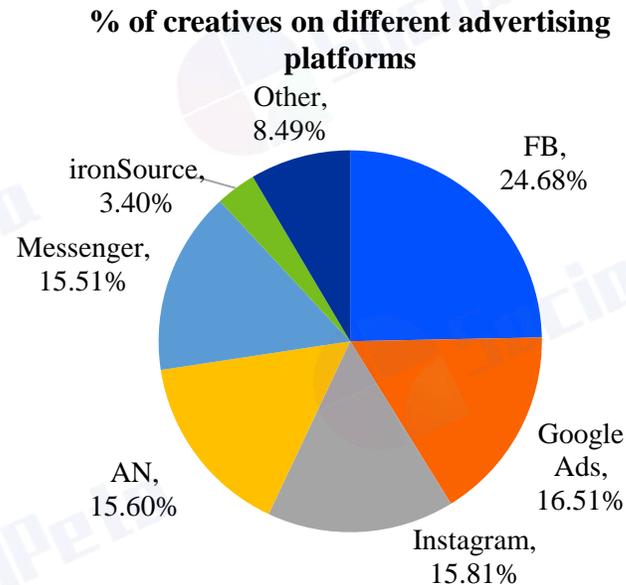
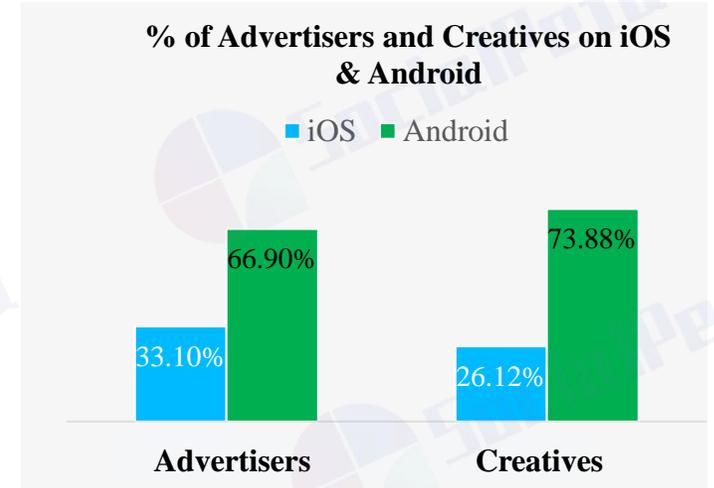
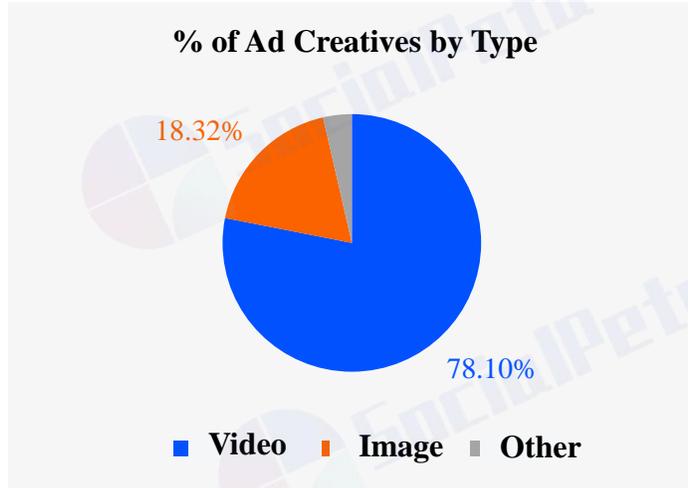


Advertising Trends in Mobile Games in China's Hong Kong, Macao & Taiwan

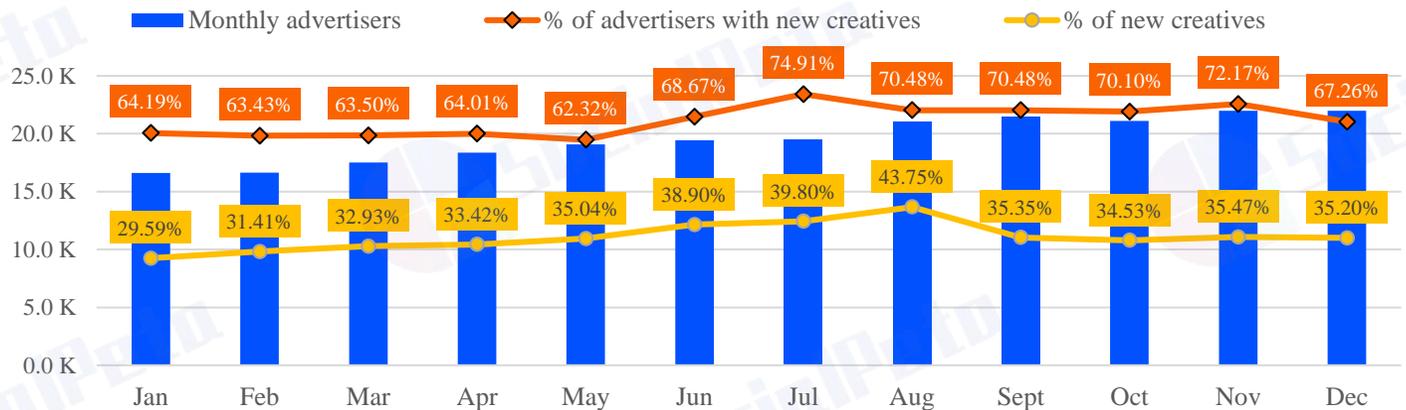


Advertising Insights into Southeast Asian Gaming Market in 2023

- Southeast Asia had nearly 20K monthly game advertisers.
- The Philippines had the most advertisers while Vietnam released the most ad creatives.
- Casual puzzle game advertisers accounted for over 50%, contributing to half of the Southeast Asian gaming market.



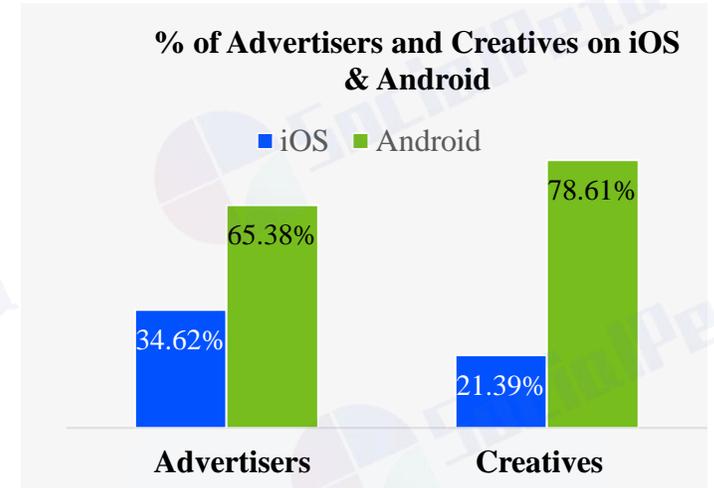
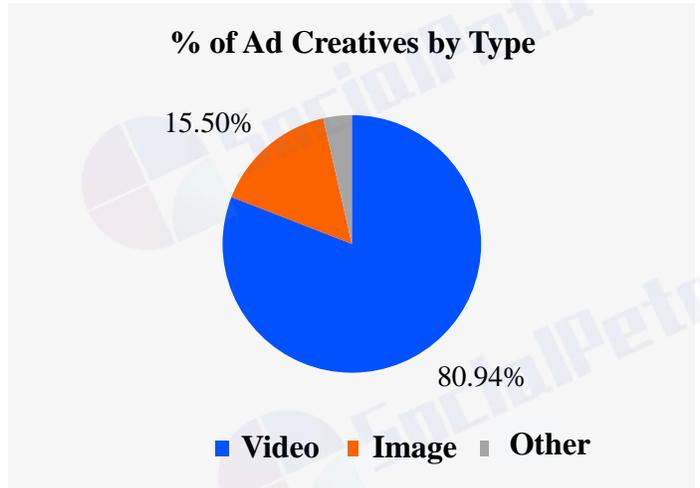
Advertising Trends in Southeast Asian Mobile Games



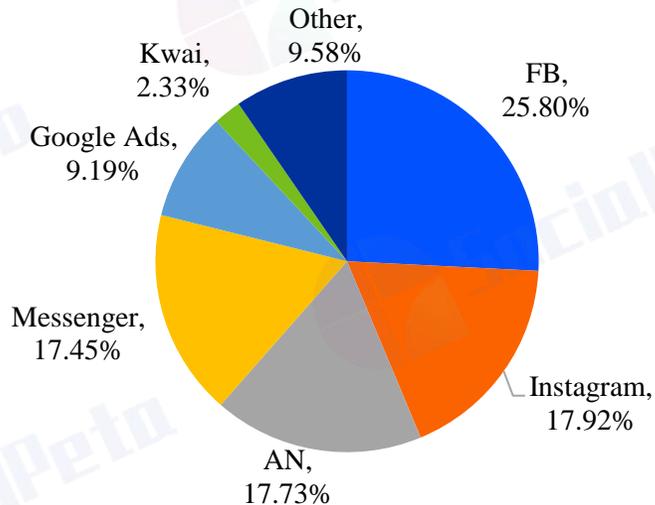
Source: SocialPeta – Advertising Intelligence, Country/Region Analysis; the data were analyzed and sorted.
Date Range: Jan. - Dec. 2023

Advertising Insights into South American Gaming Market in 2023

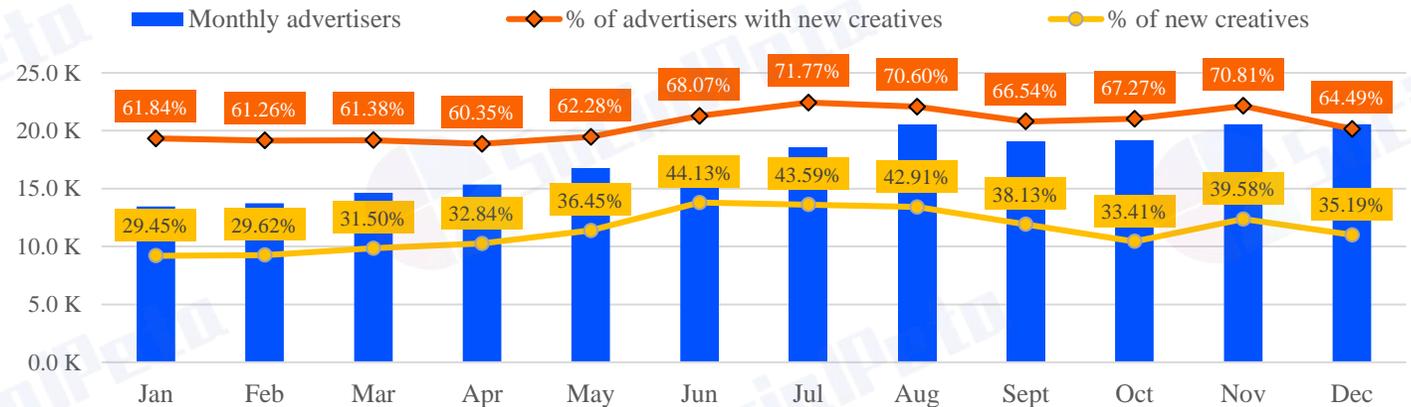
- South America had over 17K monthly game advertisers.
- Brazil was ranked No.1 in terms of both advertisers and ad creatives in the South American market.
- Mini-game advertising was more effective. The top 3 game advertisers of the year were [Epic Heroes], [Mafia City], [Mighty Party], respectively.



% of creatives on different advertising platforms



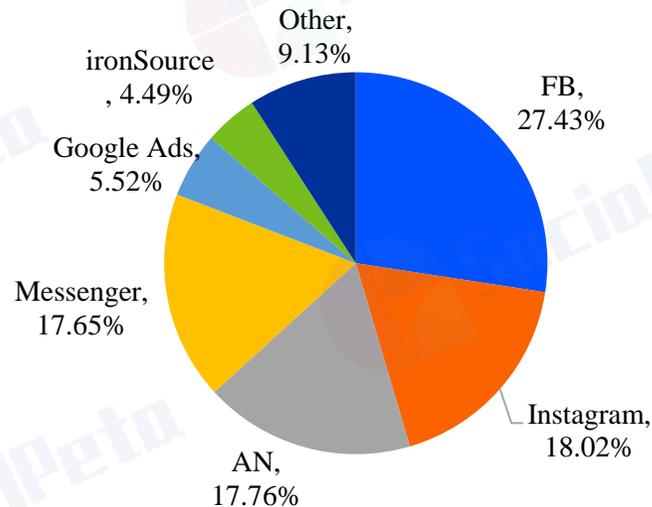
Advertising Trends in South American Mobile Games



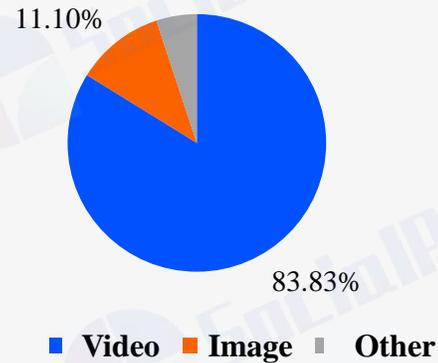
Advertising Insights into Middle Eastern Gaming Market in 2023

- The Middle Eastern market was among the world's leading markets in terms of monthly advertisers and proportion of advertisers with new creatives.
- Meanwhile, Middle East had the highest share of video creatives globally, thanks to the region's complete network infrastructure and high popularizing rate of smartphones.

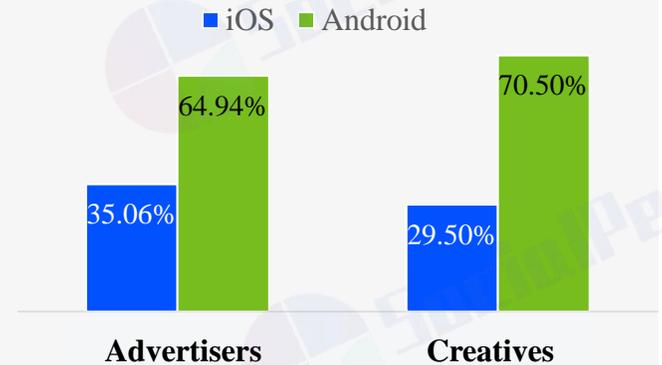
% of creatives on different advertising platforms



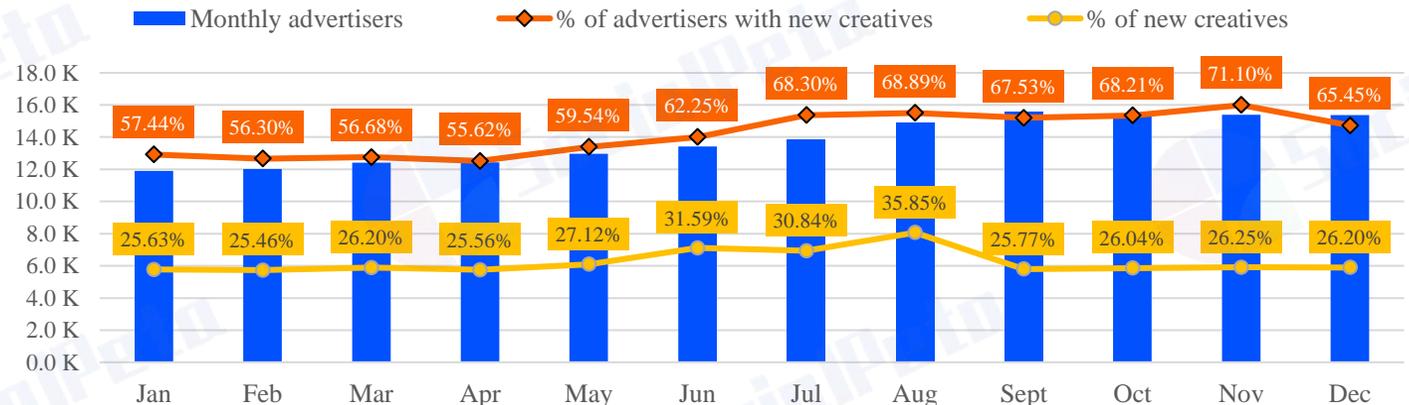
% of Ad Creatives by Type



% of Advertisers and Creatives on iOS & Android



Advertising Trends in Middle Eastern Mobile Games





04

Marketing Insights into Top Mobile Game Genres

Chapter Highlights

/ 01

SLG mobile game creatives: start with eye-catching 3s

Europe, Middle East, and Southeast Asia saw a sharp rise in advertising. Popular new games were distinguished by their features and high quality. AAA games were emerging in an endless stream. SLG game creatives often rely less on game strategies and more on visual impact to attract people. Mini-game ad creatives that contain dramatic stories and begin with sexy or life-threatening elements can easily catch people's eyes.

/ 02

SIM mobile games' monthly updated mini games

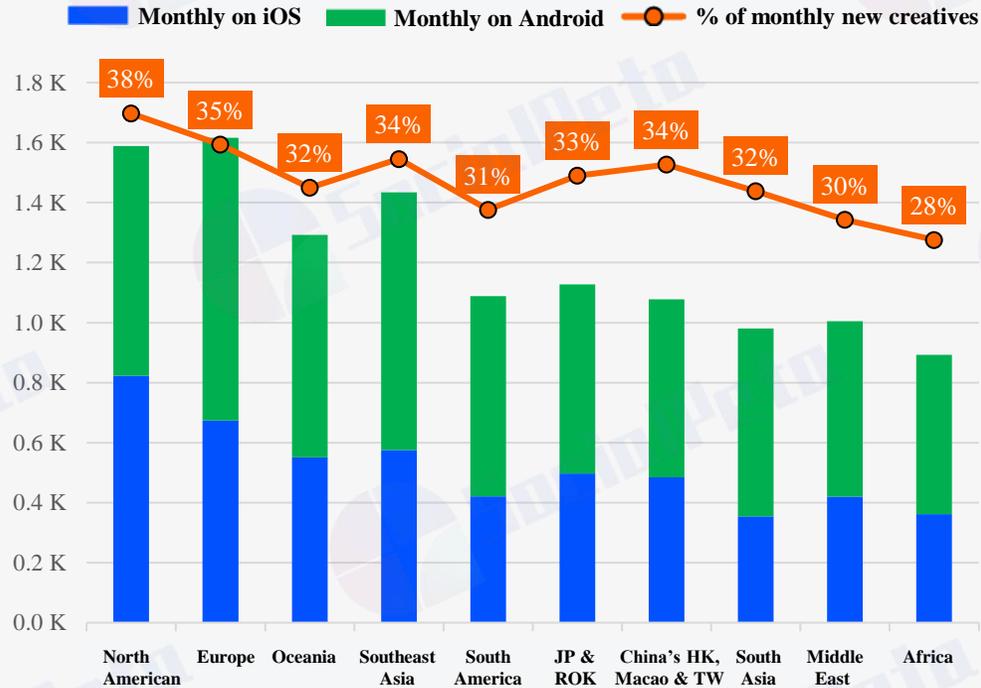
In terms of impressions, SIM games' video creatives topped all other types of creatives. Popular new games were mainly simulator, business simulation, and life simulation, among which idle business simulation was widely applicable. Century Games and Dragonplus achieved high performance again by using ASMR mini games. And Century Games updated its games frequently to keep up with the latest gaming trends. The trick was to attract more attention through mini-game advertising and improve user conversion rate through gameplay.



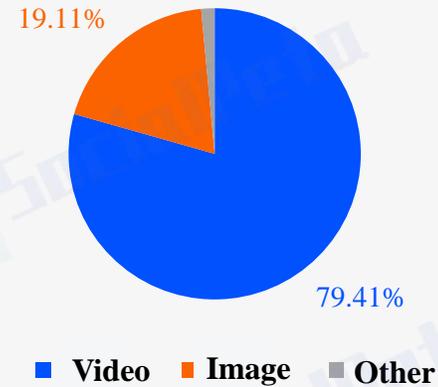
Advertising Insights into SLG Games in 2023

SLG mobile games had great potential in markets including Southeast Asia and Middle East. In this game genre, popular new games were distinguished by their features and high quality, and AAA games were emerging in an endless stream.

Creatives for SLG game advertisers in different regions in 2023



% of new creatives for SLG games by type



Impressions per video creative: 90.9K

Impressions per image creative: 87.7K

Popular SLG game advertisers in 2023



Dragonheir: Silent Gods

First Release Date: 26/7/2023

Total Deduplicated Creatives: 19K



Beast Lord

First Release Date: 31/12/2022

Total Deduplicated Creatives: 12K



Whiteout Survival

First Release Date: 28/9/2022

Total Deduplicated Creatives: 33K

SLG Games' Popular Creatives

SLG game creatives often rely less on game strategies and more on visual impact to attract people. Mini-game ad creatives that contain dramatic stories and begin with sexy or life-threatening elements can easily catch people's eyes.

Pattern 1



Mini-game advertising has been trending since its sudden boom in 2022. Currently, parkour and tower climbing are still the most effective and widely accepted in mini-game advertising.



Pattern 2



A common formula for popular creatives is “life-threatening + items choosing + problem-solving + deliberate failure”.



Pattern 3



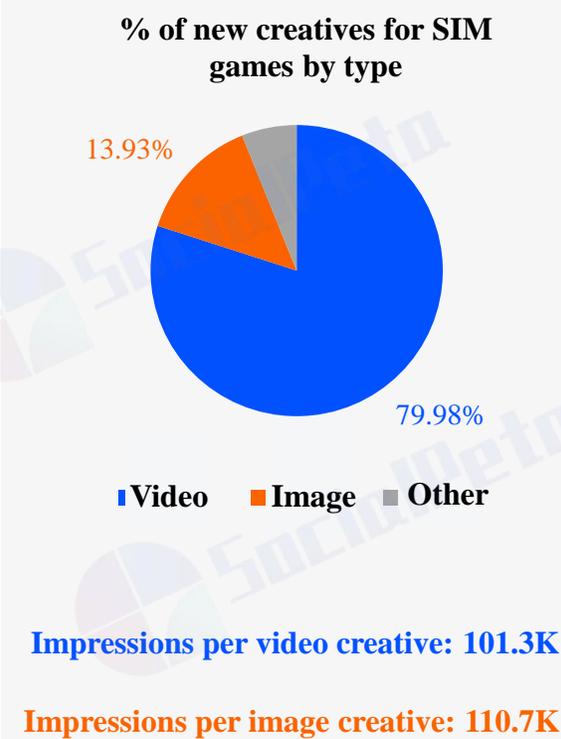
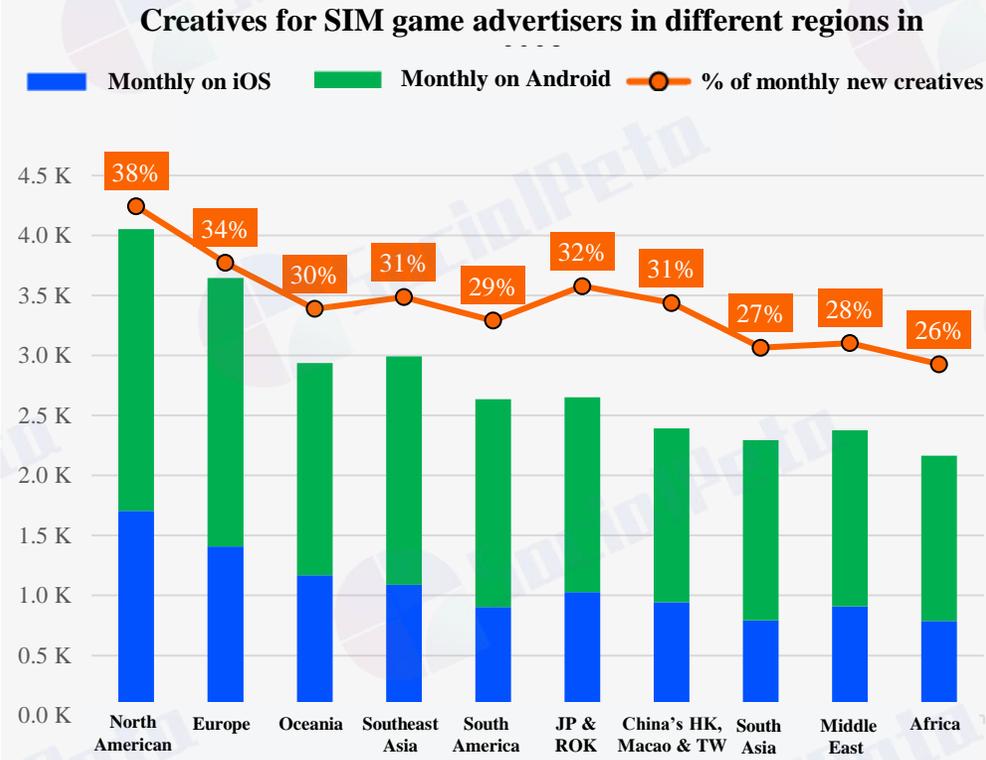
Gender-targeted flirting marketing is brilliantly effective on certain user groups. Besides sexy elements, the creatives often include dramatic stories about “the hero saves a beauty”, “a beauty is mistaken”, and so on



[Click to play the complete creative](#)

Advertising Insights into SIM Games in 2023

In terms of impressions, SIM games' video creatives topped all other types of creatives. Popular new games were mainly simulator, business simulation, and life simulation, among which idle business simulation was widely applicable.



Popular SIM game advertisers in 2023



Pokémon Sleep

First Release Date: 12/7/2023

Total Deduplicated Creatives: 2K



早安總裁

First Release Date: 6/3/2023

Total Deduplicated Creatives: 8K



Happy Hospital

First Release Date: 22/12/2022

Total Deduplicated Creatives: 17K

SIM Games' Popular Creatives

SIM games' potential users are mostly female, and the creatives are mainly about dramas, novelty, and appreciation of ugliness. Creatives for many simulator games often start with a live-action video which is followed by an in-game simulation of game mechanics.

Pattern 1



Common heroine revenge stories are cliché but useful, involving unfaithful husbands, cheating boyfriends, and disloyal besties.



Pattern 2



A combination of a live-action short video and an in-game simulation of game mechanics, the creative is amazingly effective.



Pattern 3



Many creatives can be formed by combining different patterns including “live-action scenarios + dumped by boyfriends + in-game battles + you have been playing a fake game”.

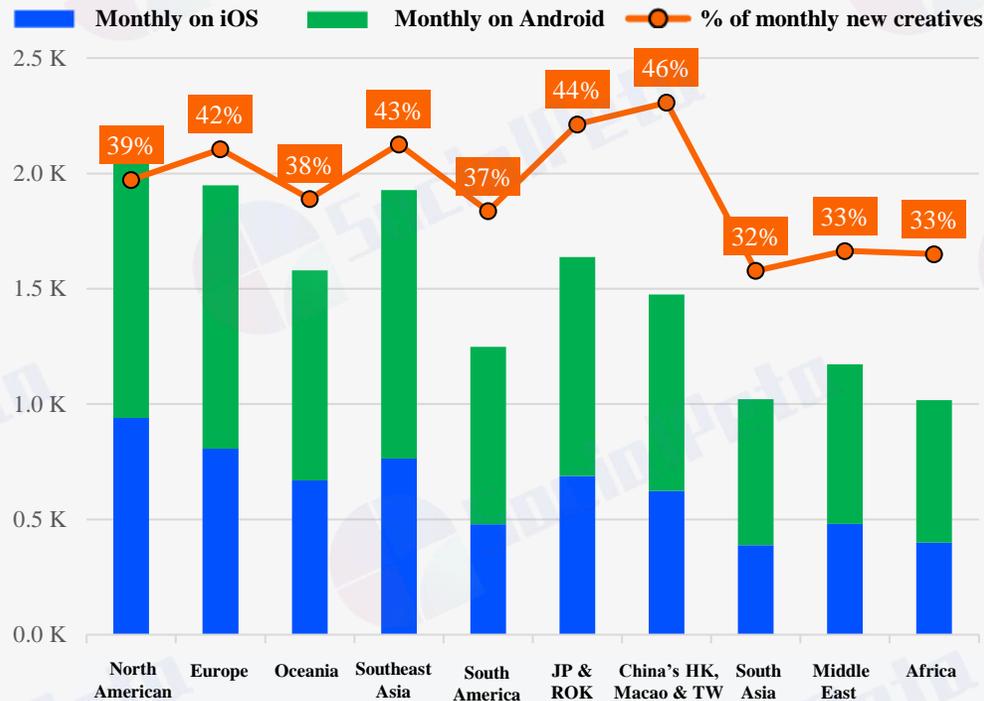


[Click to play the complete creative](#)

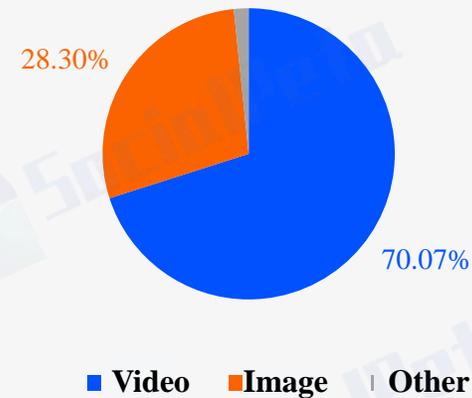
Advertising Insights into RPGs in 2023

RPGs basically can be divided into two groups: 1. ACG gacha games; 2. dark hard-core fantasy games.

Creatives for RPG advertisers in different regions in 2023



% of new creatives for RPGs by type



Impressions per video creative: 66.2K

Impressions per image creative: 65.7K

Popular RPG advertisers in 2023



Honkai: Star Rail

First Release Date: 29/12/2021

Total Deduplicated Creatives: 19K



Monster Hunter Now

First Release Date: 4/8/2023

Total Deduplicated Creatives: 3.1K



合金彈頭: 覺醒

First Release Date: 16/6/2023

Total Deduplicated Creatives: 27K

RPGs' Popular Creatives

Unlike SLG games, RPG creatives are often strongly associated with the gameplay and the game's built-in controls, such as AI portrait generation, world map, gacha and other patterns for video creatives.

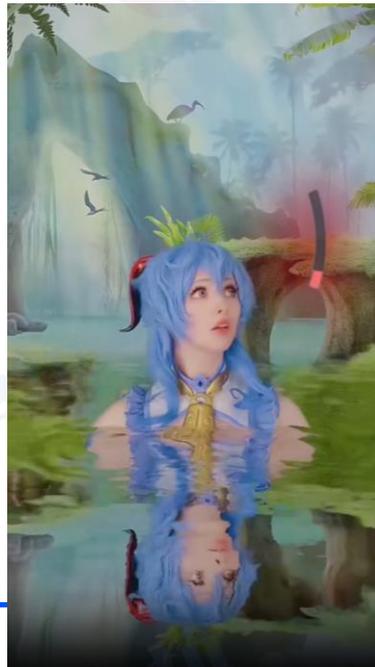
Pattern 1



The creative is a display of in-game AI portrait generation, highlighting the game's high degree of customization and bringing out the female character's gracefully slender figure in order to attract more people.



Pattern 2



A practical and widely applicable marketing pattern: live-action short video + local online celebrity cosplay + popular character appearance.



Pattern 3



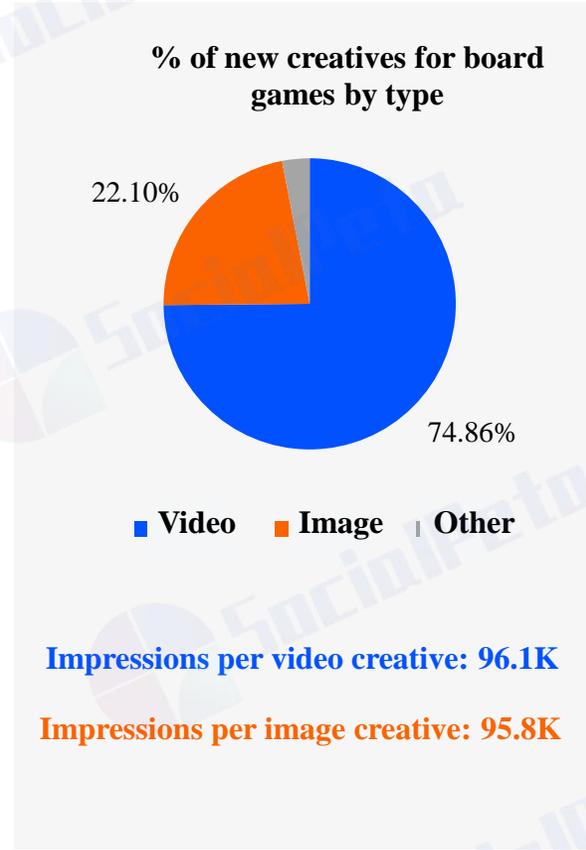
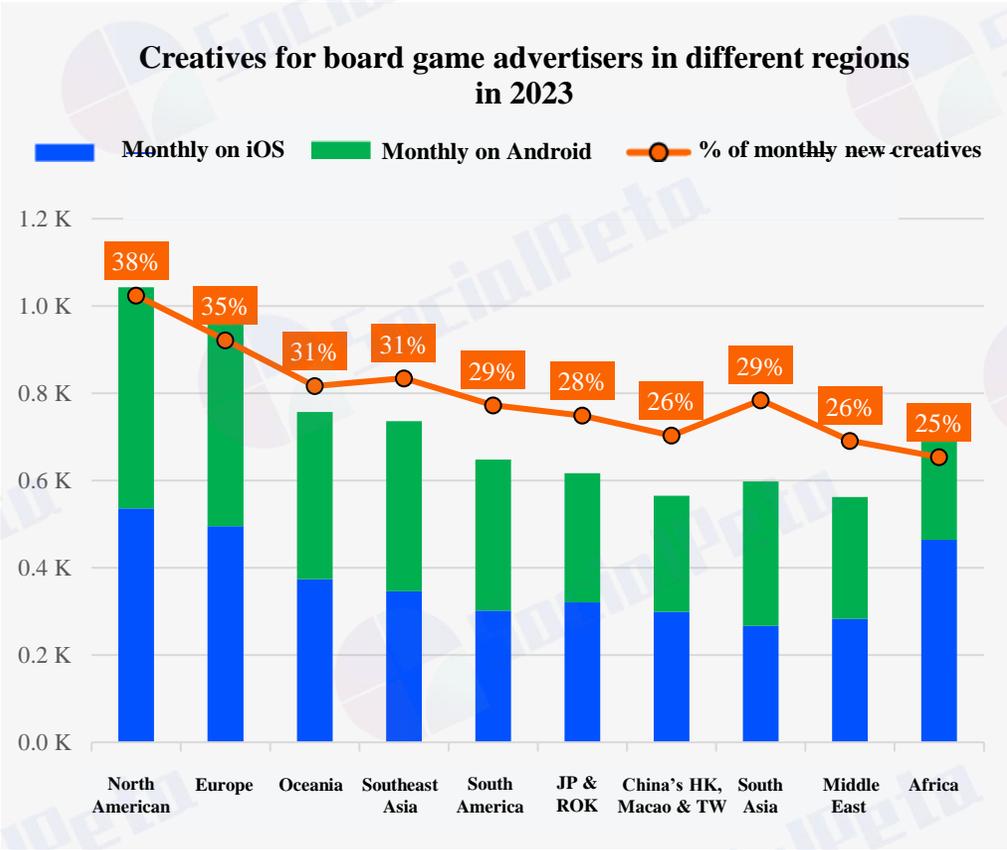
The whole gacha is live-streamed, highlighting the drop rate of important cards in game. Different gacha creatives can be generated by combining the streamer's instant reaction, such as exaggerated expression, calming speech, or future training of cards.



[Click to play the complete creative](#)

Advertising Insights into Board Games in 2023

Board mobile games reported more stable numbers of advertisers and creatives on iOS. Board games had a large target audience in North America and Africa. Social interaction is also a big selling point of board games.



- ### Popular board game advertisers in 2023
- Hidden Objects**
 First Release Date: 20/3/2023
 Total Deduplicated Creatives: 1.7K
 - MONOPOLY GO!**
 First Release Date: 1/7/2022
 Total Deduplicated Creatives: 26K
 - 麻將無雙**
 First Release Date: 4/2/2023
 Total Deduplicated Creatives: 5.6K



Board Games' Popular Creatives

Board game creatives focus on displaying game features and how social interaction is conducted through games. They are a wonderful combination of gaming and social interaction.

Pattern 1



Critical moment + problem-solving + end in failure



Pattern 2



The creative combines gameplay and nostalgic background, amazingly effective on specific gamers.



Pattern 3



Live-action introduction + game display + enthusiastic speech + subtitle performance. It's very convincing.

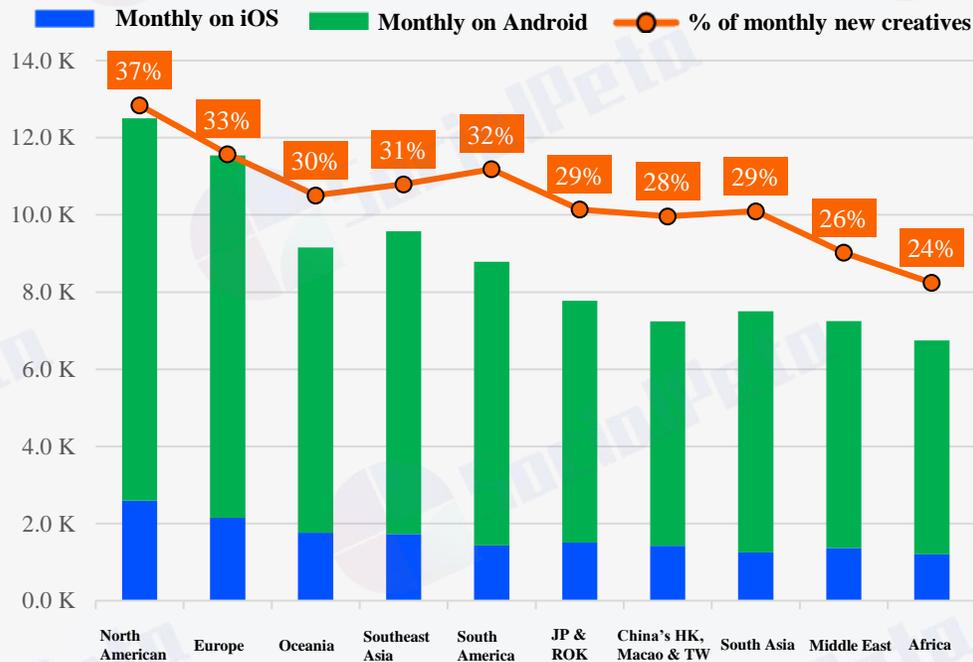


[Click to play the complete creative](#)

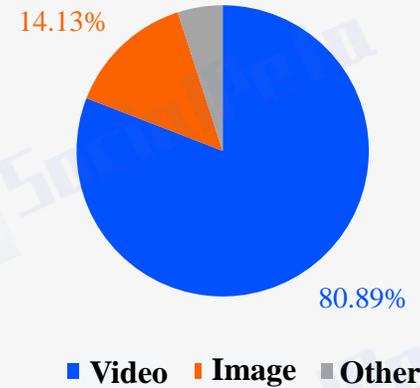
Advertising Insights into Casual Games in 2023

Casual games reported the highest numbers of advertisers and creatives among all game genres. Popular new casual games featured Roguelike, parkour, and social interaction.

Creatives for casual game advertisers in different regions in 2023



% of new creatives for casual games by type



Impressions per video creative: 90.5K

Impressions per image creative: 95.9K

Popular casual game advertisers in 2023



小妖問道

First Release Date: 7/8/2023

Total Deduplicated Creatives: 5.4K



Weapon Craft Run

First Release Date: 13/3/2023

Total Deduplicated Creatives: 23K



Eggy Party

First Release Date: 7/9/2023

Total Deduplicated Creatives: 2K

Casual Games' Popular Creatives

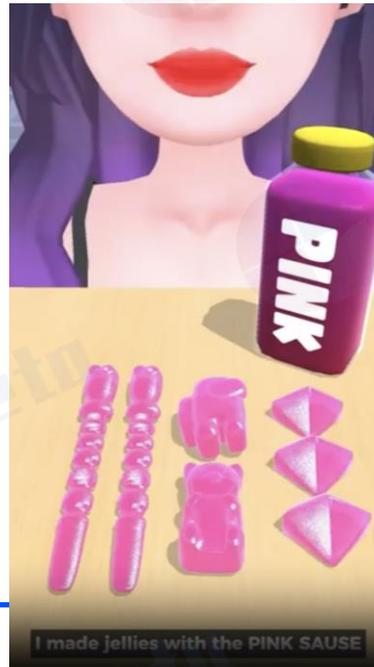
A casual game's ad creatives are often entirely based on the game's contents, except for some changes to the BGM and gaming mode. Casual games themselves are suitable materials for live-streaming. UGC ad creatives can spread at a dramatically high speed.

Pattern 1



Real-time recording of in-game content + sexy and flirting

Pattern 2



Trendy catch phrases online in foreign countries + ASMR sound effects + simulated interaction during live streaming, displaying the game's charm.

Pattern 3



Deliberate failure + reactions to the BGM rhythms + end in failure, encouraging people to try it.

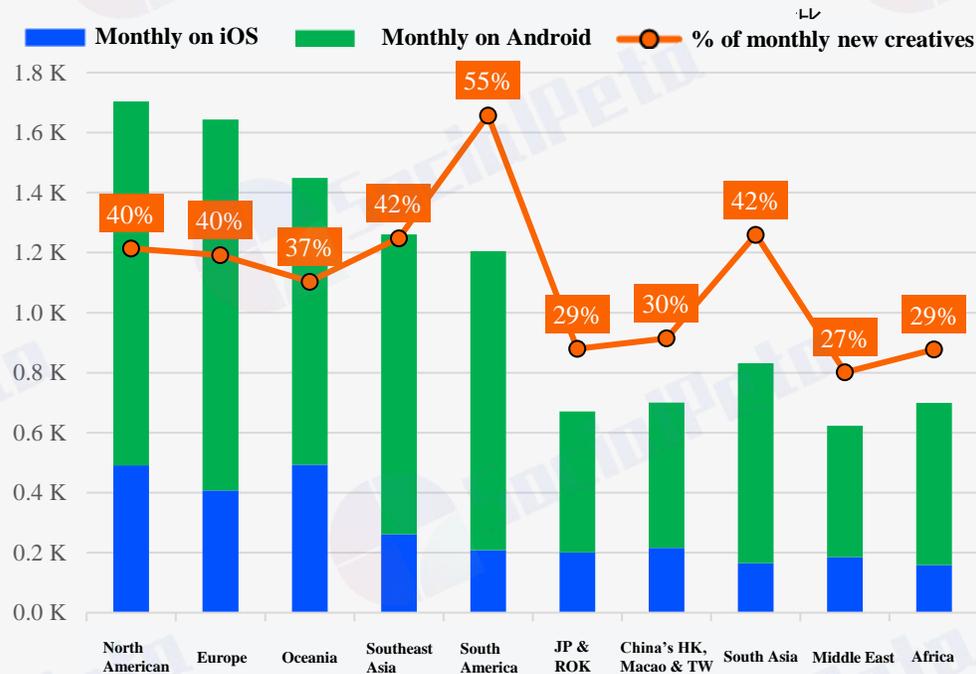


[Click to play the complete creative](#)

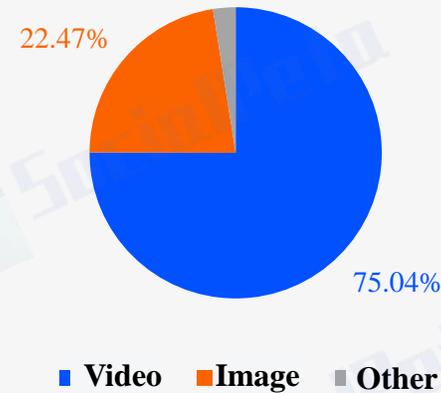
Advertising Insights into Casino Games in 2023

Casino games had a dominantly high percentage of creatives on Android. Old game advertisers remained on the charts for years without being surpassed by any new games.

Creatives for casino game advertisers in different regions in 2023



% of new creatives for casino games by type



Impressions per video creative: 61.9K

Impressions per image creative: 59.7K

Popular casino game advertisers in 2023



Jackpot World™

First Release Date: 8/6/2018

Total Deduplicated Creatives: 188K



Coin Master

First Release Date: 4/4/2016

Total Deduplicated Creatives: 76K



Solitaire

First Release Date: 29/10/2019

Total Deduplicated Creatives: 18K

Casino Games' Popular Creatives

Casino game creatives are often very simple, with convincing live-action and the lure of money.

Pattern 1

DELETE YOUR FAKE BINGO RIGHT NOW!



A trendy pattern on TikTok followed by a recommendation of the game



Pattern 2



A romantic drama scenario combined with an in-game story, which makes the game more appealing.



Pattern 3



Real money has the strongest impact on casino gamers.



[Click to play the complete creative](#)



05

Marketing Insights into Hit Mobile Games in 2023

Chapter Highlights

/ 01

Card RPGs became the fastest growing, while “live broadcast + in-game scenes” was an effective pattern among popular creatives.

Ad creatives featured a combination of KOL live broadcasting and in-game scenes, engaging the attention of the audience, and also promised to have rewards such as “80 Free Pulls”.

/ 02

[Whiteout Survival] released creatives focusing less on conflicts and more on construction.

Unlike other SLGs, the game’s popular creatives deliberately cut down on conflicts and focused on construction and amusing mini-game contents.

/ 03

Overseas social games favored live-action creatives or celebrity endorsement ads.

In the overseas market, live-action ad creatives were often distinctively high-quality videos containing a wonderful combination of in-game scenes and scenes of life.



A Hit Card RPG in 2023

Released in April 2023, the game won the “Best Mobile Game award at TGA 2023”.

Honkai: Star Rail

An ACG turn-based card game by miHoYo

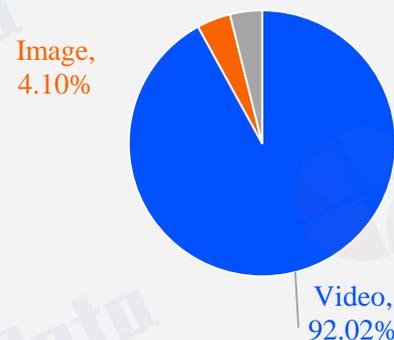


Advertising Data

First advertising date: November 2019

Total deduplicated creatives: 20.2K

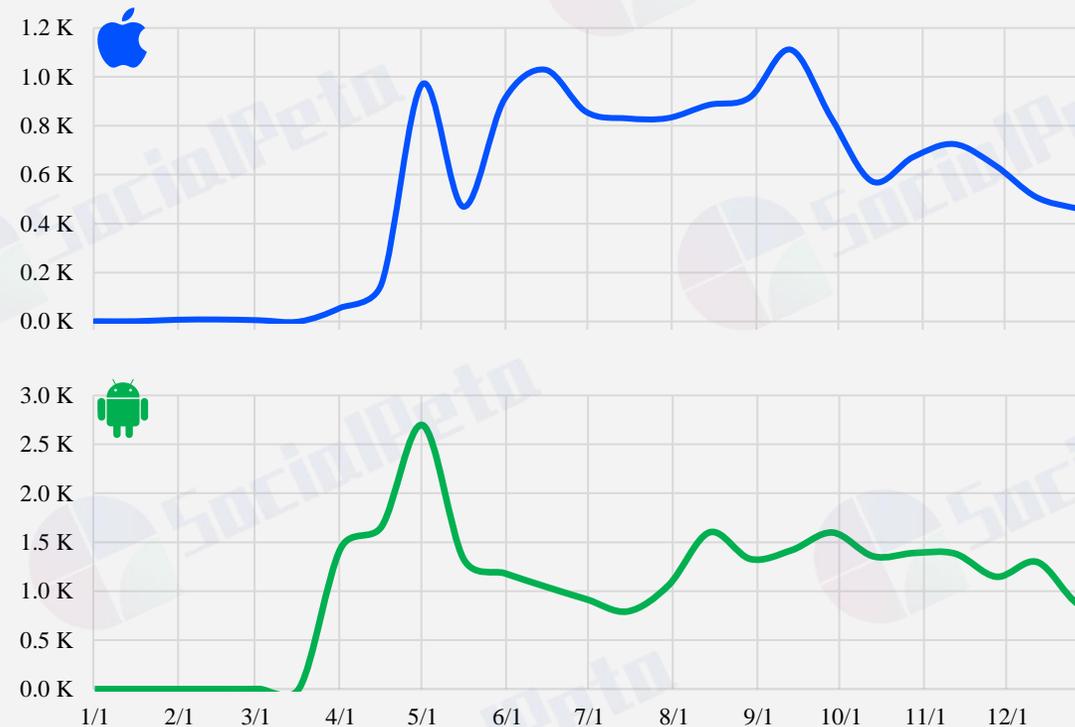
% of Ad Creatives by Type



Top 10 countries/regions by advertising



Curves of the Game's Ad Creatives in 2023



Honkai: Star Rail's Popular Active Ad Creative



Advertised on:  **TikTok**

Estimated Impressions: 29.8M

Features:

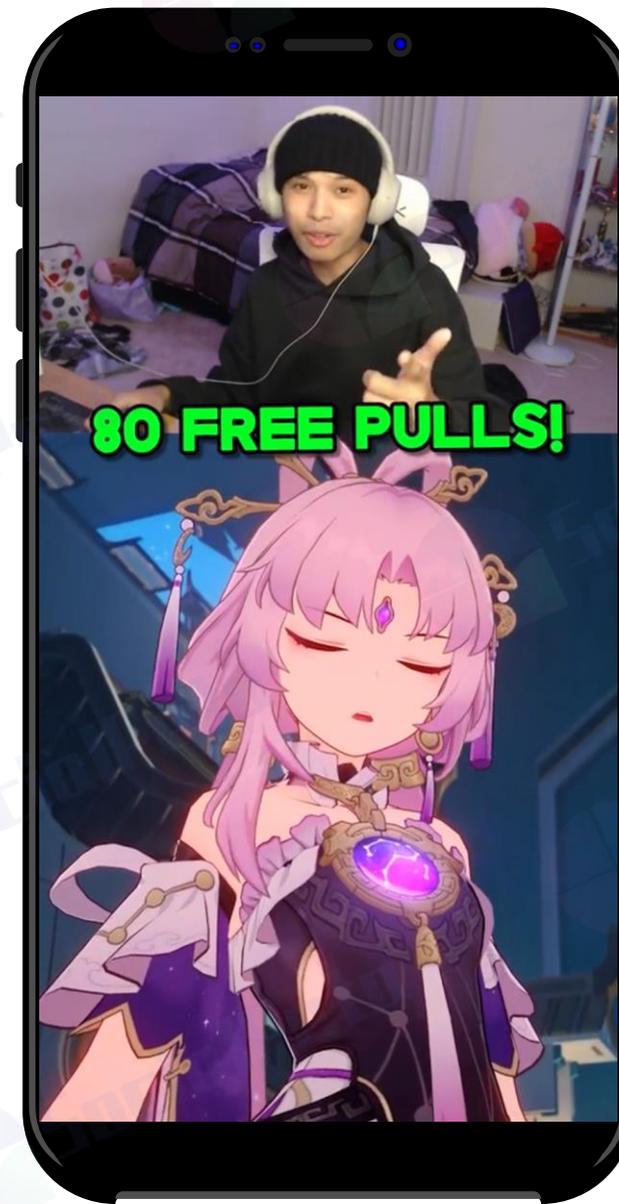
It features a combination of KOL live broadcasting and in-game scenes, engaging the attention of the audience, and also promises to have rewards such as “80 Free Pulls”.

129.3K

Likes

24K

Estimated
conversions



Click to play
the complete
creative

A Hit SLG in 2023

The most outstanding and fast-growing new SLG

Whiteout Survival

a frozen apocalypse survival SLG by Century Games

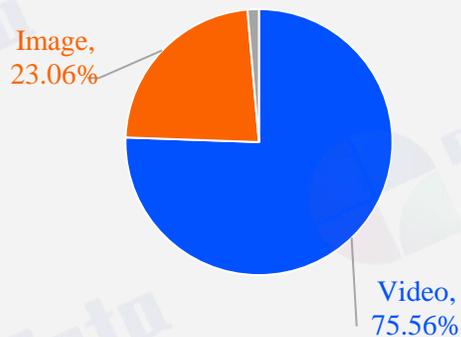


Advertising Data

First advertising date: September 2022

Total deduplicated creatives: 33.1K

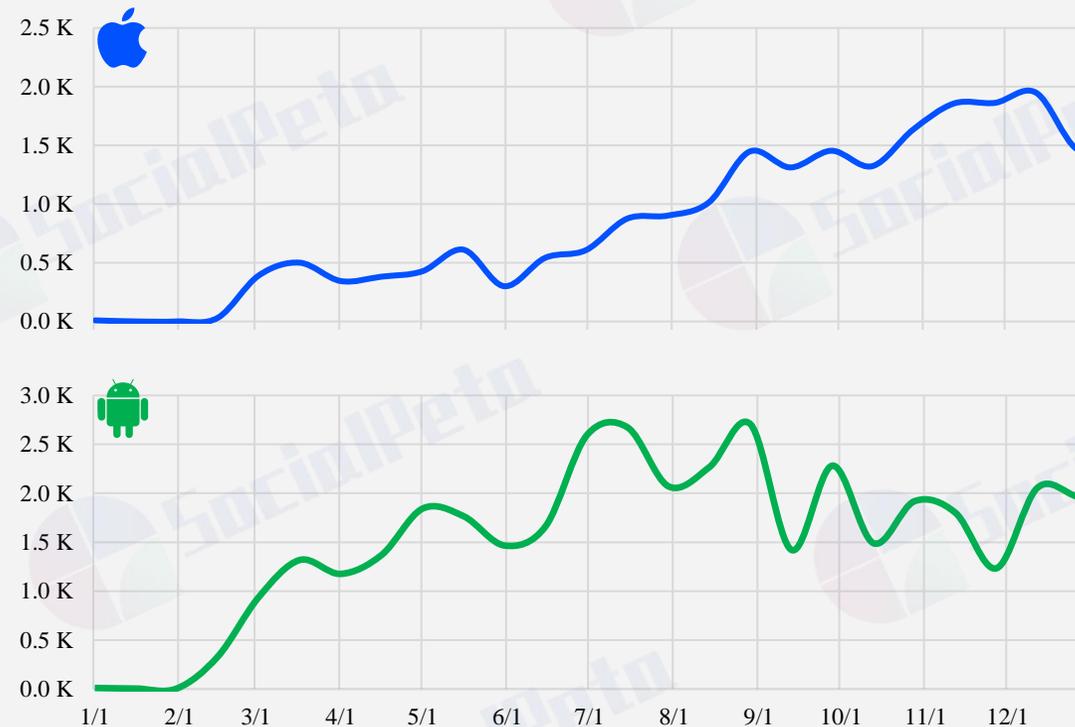
% of Ad Creatives by Type



Top 10 countries/regions by advertising



Curves of the Game's Ad Creatives in 2023



Whiteout Survival's Popular Active Ad Creative



Advertised on: unity ADS

Duration: 74 days

Features:

Unlike other SLGs, the game's popular creatives deliberately **cut down on conflicts** and focused on **construction and amusing mini-game contents**.

Oct. 2

First release

794.4K

Estimated Impressions



Click to play the complete creative

A Hit Action Shooter Game in 2023

Since its global release on 14 July, the game had been allocated with the most marketing efforts from Level Infinite, an international brand of Tencent, for the second half of the year.

Arena Breakout

A hard-core immersive shooter game by Tencent

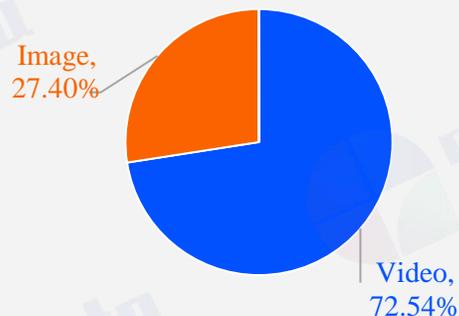


Advertising Data

First advertising date: November 2022

Total deduplicated creatives: 13.0K

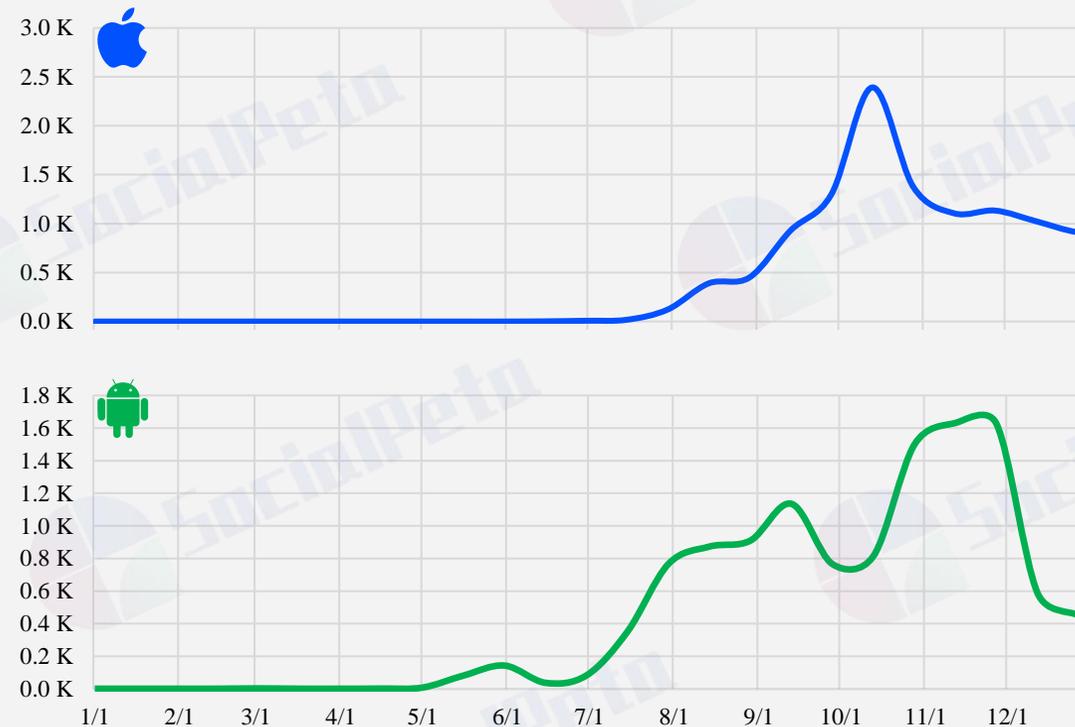
% of Ad Creatives by Type



Top 10 countries/regions by advertising



Curves of the Game's Ad Creatives in 2023



Arena Breakout's Popular Active Ad Creative



Advertised on: Google Ads

Duration: 57 days

Features:

Creatives with rhythmic BGMs are often effective and welcome. Many shooter games are inclined to have ad creatives that are fun to watch. Exciting games and funny ads work well together.

342

Popularity

344.5K

Estimated Impressions



[Click to play the complete creative](#)

A Hit Board Game in 2023

The game grossed over \$1 billion in global revenue within 7 months after its release, becoming the biggest hit among all mid-core and light games overseas.

MONOPOLY GO!

A Monopoly-like board game by Scopely

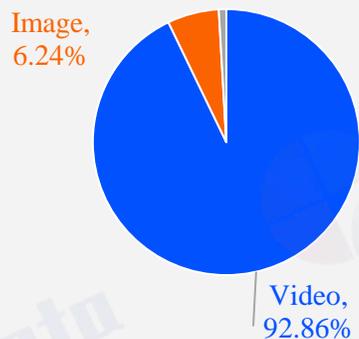


Advertising Data

First advertising date: July 2022

Total deduplicated creatives: 26.3K

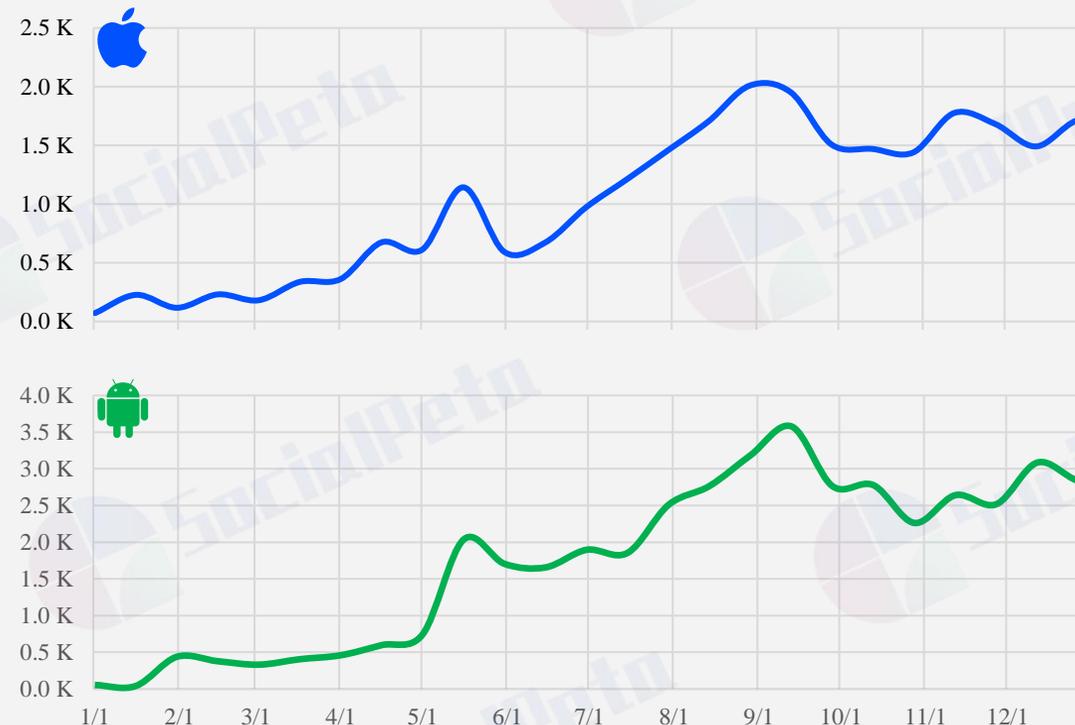
% of Ad Creatives by Type



Top 10 countries/regions by advertising



Curves of the Game's Ad Creatives in 2023



MONOPOLY GO!'s Popular Active Ad Creative



Advertised on: **YouTube**

Release date: Jan. 24, 2023

Features:

In the overseas market, live-action ad creatives were often distinctively high-quality videos containing a wonderful combination of in-game scenes and scenes of life.

58.8K

Estimated conversions

11.8K

Estimated Impressions



Click to play the complete creative

A Hit Casual Game in 2023

With its media buying far exceeding that of SLGs and its classic gameplay, the game remained among Top 10 on the free game charts in many markets for a long time.

Block Blast!

A tile-matching casual game by Hungry Studio

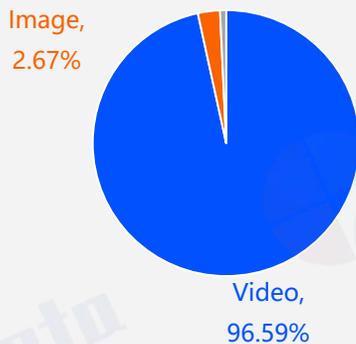


Advertising Data

First advertising date: April 2022

Total deduplicated creatives: 60.5K

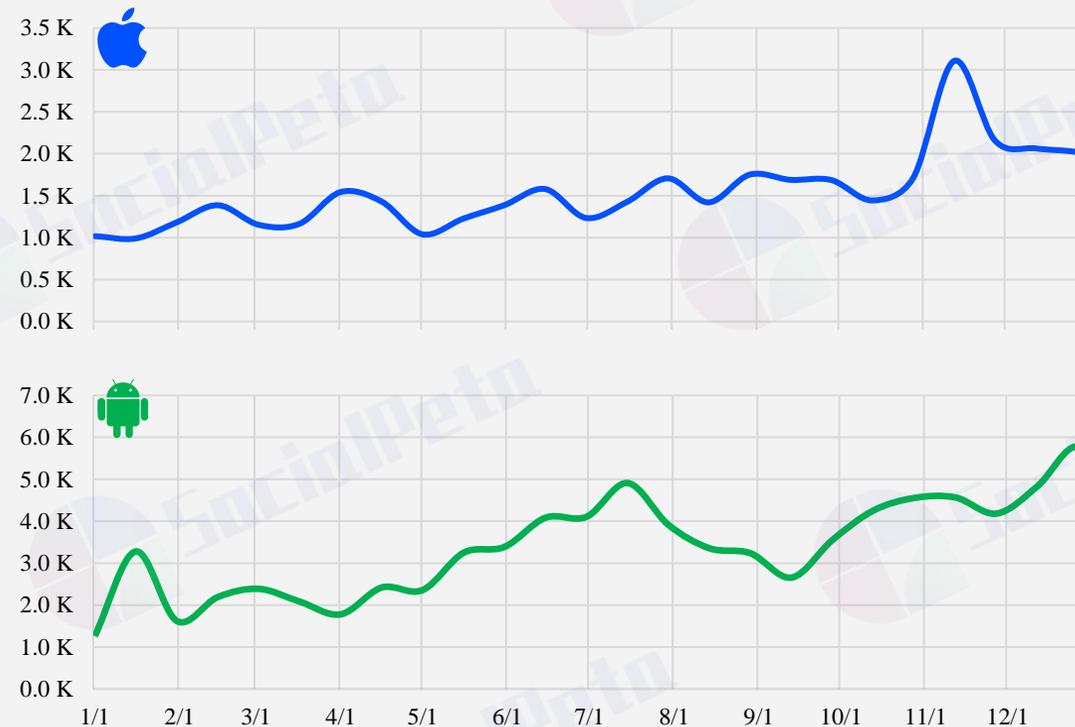
% of Ad Creatives by Type



Top 10 countries/regions by advertising



Curves of the Game's Ad Creatives in 2023



Block Blast!'s Popular Active Ad Creative



Advertised on: [facebook](#)

Duration: 88 days

Features:

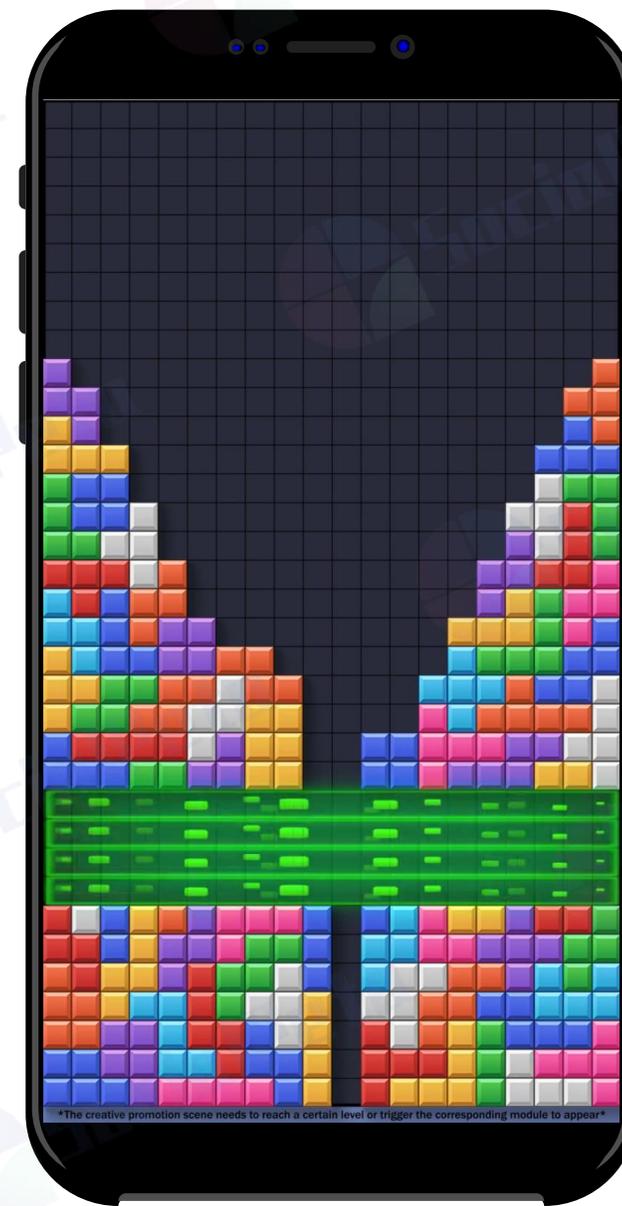
Good ad creatives for classic casual games are often the hardest to get. Though it is often a display of how to play the game, the trick is to add exciting moments and highlight the game's innovations.

702

Popularity

797.1K

Estimated Impressions



Click to play the complete creative

The creative promotion scene needs to reach a certain level or trigger the corresponding module to appear



06

Overview of Key Marketing Cases of Mobile Games in 2023

Mini-Game Advertising, the most popular form of media buying in 2023

Since mini-game advertising was first applied, game companies have been bothered by problems including gamer frauds, poor union with main gameplay, dissatisfactory user acquisitions, and low user retention rates.

Nowadays, mid-core and hard-core games are having lighter and lighter gameplay, and ACG minigames are booming. Having their many doubts dispelled, game companies embrace mini-game advertising with no hesitation. Mini-game advertising has evolved from “main game+ mini-game” into “mini-game +”. 2023 witnessed the full evolution and overall popularization of mini-game advertising.

Mini-game ad creatives have changed from awkwardly added mini-games to well-designed three-stage creatives. For example, the universally popular formula of “eye-catching start + gameplay display + deliberate failure”.



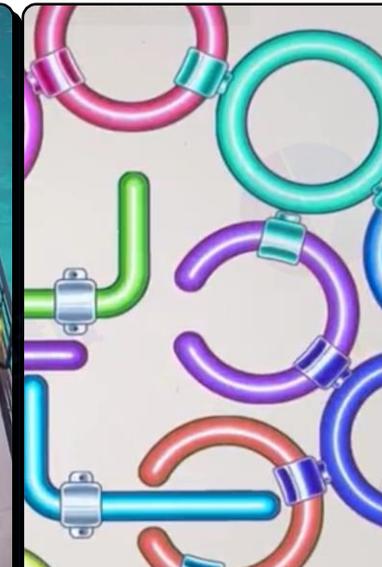
Sexy + Tower climbing

The upgradable characters are usually male. It often starts with cheating and adultery, sexy beauties, heroic rescue, and other exciting elements, making direct visual impact. Tower-climbing creatives are different mainly in maps and directions of climbing.



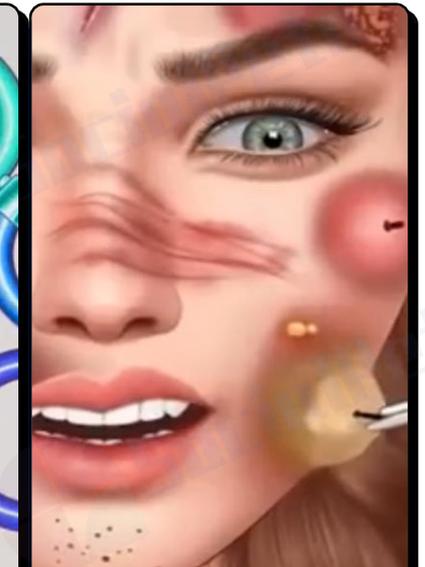
Shooter + Hitting gates + X

Gates and obstacles serve as temptations to the audience, engaging them in the creative. When the audience try to figure out a way, they would wonder if that is a right way and how the creative will end. All the thinking and hesitation would be an immersive experience for the audience.



Live-action short video + Puzzle

Live-action short video creatives suit the tastes of users on short-video platforms and attract non-core gamers to complete user conversion. Short videos often start with live-action playing of minigames and smoothly cut to in-game scenes.



Popping pimples + ASMR

Various immersive videos about popping pimples, squeezing out blackheads, teeth brushing, face washing and skin care are popular with people around the world. Wonderfully soothing audio + peaceful and quiet scenes together form the specially relaxing ASMR.



Century Games' [Dragonscapes Adventure] Regained Popularity Through Mini-Games

Old games coming back:

Published in December 2022, Dragonplus' hospital business simulation mobile game [Happy Hospital] became a big hit in 2023 thanks to ASMR mini-game advertising. The game achieved a total of over 5.3 million downloads in May and remained on the AppStore chart of Top 5 free games in the U.S. for one month.

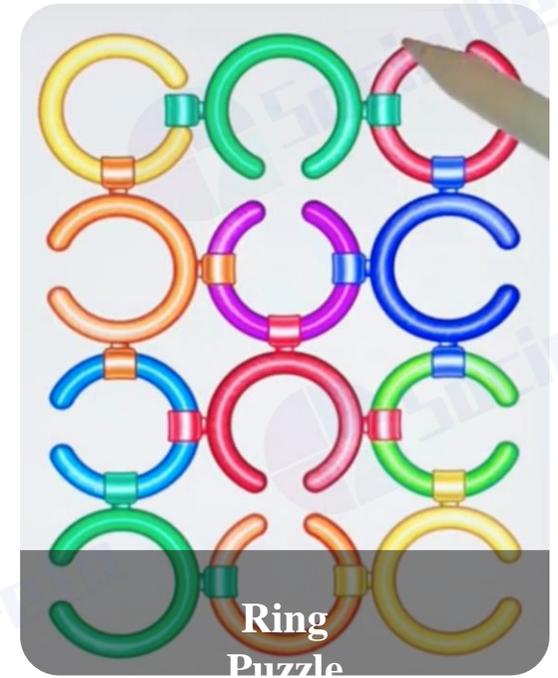
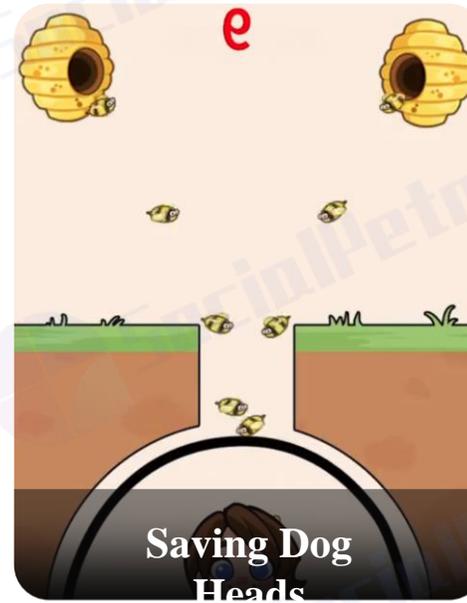
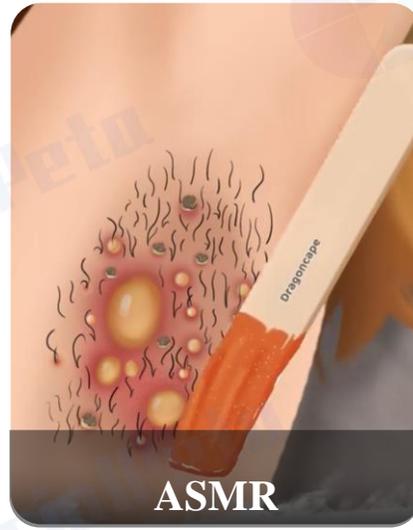
Similarly, Century Games' farm business simulation mobile game [Dragonscapes Adventure] gained rising downloads and revenue 3 years later since it was published, thanks to its frequent updates of mini-game ad creatives, game ICONs, and images of inventory items.

Monthly updates of mini-games:

A game and its mini-game ad creative used to be tightly bound together, for example, [Evony] and pin pulling, [Hero Wars] and tower climbing, [X-Hero] and saving dog heads. Game companies would release fixed mini-game creatives for a game continually within a year, in order to bind the game's main gameplay with its mini-games. However, mini-games, just like short videos, are oddly charming and addictive but very easy to copy and go out of fashion.

However, Century Games thought out of the box and made a change by frequently updating at least 10 mini-game creatives within just 1 year, including saving dog heads, ASMR, parking lot, ring puzzle, pushing boxes, one uninterrupted-line drawing, and fried yogurt. The company generously updated mini-games every month and released new ad creatives frequently for the purpose of acquiring more users for its games.

Click to play the complete creative



AIGC Has Sped up the Production of Ad Creatives

New AI application injected new vitality to the industry of global mobile game creatives. Rapidly developed AI technology has brought profound changes to the production of mobile game advertising creatives, with the most significant changes to ad creatives' content customization, generation, and real-time optimization.

A successful integration of AI and creatives production is very important to RPGs, especially MMORPGs which have a bigger share of media buying. [An increase was observed in the share of image creatives for global mobile games in 2023, which was obviously a result of AI's wider application in the production of ad creatives.](#)

Image is the mainstream type of AIGC advertising creatives. However, during the image generation, it should be noted that:

- AI image-generators suck at generating images of hands, so try to avoid details of hands;
- Instead of tracking images, AI generates entirely new contents;
- No matter how you will use AI, you must make sure that your creatives are legal.

After an image is generated, you can use tools such as LeiaPix to make it animated, so it can meet more advertising demands.



SocialPeta's New Feature, AIGC

- ◆ Fast generation of image creatives
- ◆ Quick updates of creatives through image-to-image generation
- ◆ Mass production of hot creatives.

Click to play the complete creative

Hot Minigames, Ready to Exploit the Overseas Markets in 2024

Minigames were undoubtedly the most rapidly growing game genre among all games in China in 2023. The WeChat minigames [Fish Kingdoms] and [Chest Hero] became big hits early this year, and reportedly grossed over \$100 million in monthly revenue. In the middle of the year, 37Games' popular game [寻道大千] topped the WeChat chart of highest-grossing minigames for 3 consecutive months since its launch.

At the end of the year, Chinese minigames were booming, with many gameplays appearing on various charts of minigames, including the above-mentioned popular idle and opening chests, and Slime, finding differences, and tower defense.

Amid the fierce competition in China, minigames seemed to be actively preparing for their global launches. Their first destination was China's HK, Macao & TW, the closest to China's mainland game market. [小妖問道] had strong performance, just like its version in China's mainland [寻道大千], to remain one of the top 20 best-selling games on App Store in Taiwan (China).

Some games launched their versions in markets other than China's HK, Macao & TW. For example, the "Fishlike" game [英雄你好狗] launched several versions in different regions: [Oh My Dog (Europe and America)], [X Dogs (Southeast Asia)], [개판오분전 (South Korea)]. It is expected that hot minigames developed in China will launch their global versions to exploit the overseas markets in 2024.

Globalization of some hot minigames (gameplay)

| Game Name | Release Date | Gameplay | Deduplicated creatives |
|---|--------------|---------------------|------------------------|
|  阿呆請出戰 | May 16 | Vampirelike | 5.1K |
|  英雄你好狗 | June 29 | Fishlike | 7.6K |
|  鹹魚之王 | July 20 | Fishlike | 1.9K |
|  小妖問道 | Aug. 23 | Opening chests | 5.7K |
|  甘道夫醒醒啦 | Nov. 13 | Idle tower defense | 11.1K |
|  爆梗找茬王 | Nov. 21 | Finding differences | 1.1K |
|  菇勇者傳說 | Nov. 23 | Opening chests | 5.0K |



Declaration

1. Data Sources

With the assistance of the world's biggest advertising intelligence and analysis tool, SocialPeta Data Team has provided you with insights into the mobile advertising data of global game market. We collect advertising data by sampling worldwide, covering over 70 channels and nearly 70 countries and regions worldwide, and have captured a total of over 1.4 billion advertising data, with over 1 million ad data being updated by the hour each day. Based on such huge data, we can gain insights into the advertising market trends.

2. Data Cycle and Indicators

Overall date range of the report: Jan - Dec 2023

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

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JP & ROK: Japan, South Korea

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

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

Oceania: Australia, New Zealand

South Asia: India, Pakistan

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

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

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



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