



WHITE PAPER ON GLOBAL MOBILE GAMES

SocialPeta Data Research Institute



Preface

VP of SocialPeta: Constance Gao

With the rapid development of the game industry, “involution” has become an inevitable consequence in the game market. As the saying goes, if you know yourself and know your enemy, you will gain victory a hundred times out of a hundred. So, a company’s product strategy and publishing strategy, for a top product, and unexpectedly successful product, or a directly competing product, would be greatly affected by whether the company has quick access to correct ad intelligence.

Competition in the global market is getting more intense as the number of creatives is surging and CPM is significantly increasing. According to the overall data, there are 3 major trends in the global mobile game market.

First, market competition is getting increasingly intense, which can be seen from the number of advertisers and the number of ad creatives. In Q3 2021 as compared to Q3 2020, the number of advertisers maintained at around 26,000, but ad creatives increased by 200% YoY, indicating very fierce competition.

Second, more ad creatives are taking the form of video which dominates and accounts for over 85% of all forms of ads. It can be very challenging for a team to produce a great number of creatives. But having access to the ad creatives of other games or competing games can greatly help improve the production efficiency of creatives.

Third, the cost is soaring. The average CPM on Facebook increased by 34% in 2021. Without any cost intelligence about the specific areas, an advertising budget can’t be set, which will undermine the smooth running of the advertising and further lead to the inefficient acquisition of customers.

Besides, Android advertisers have been making as much advertising effort as iOS advertisers, which is a noticeable result of the iOS privacy policy.

Personalized promotion has become a mainstream model. It’s worthwhile to pay attention to local platforms in local markets.

And, there have also been some changes in choosing a target market. Early exporting strategies were globalization. Companies didn’t know which were key areas and therefore adopted globalization strategies. As game companies gained more and more experience in exporting games, they gradually developed special skills in exporting certain types of games into certain areas. For example, Kunlun focuses on the Southeast Asia, and efun on China’s Taiwan. Now companies would decide where to export games based on their resources and the game features. Many games have target users before they are published, or even have target markets even before they are developed.

With those companies getting established over time, market conditions and trends of all areas have been known to the whole industry. For instance, the US, Japan, and South Korea are classified as T1 markets with higher paying user rates and higher ROI. The UK, France, and Germany are T2 markets with a considerable user base and high spending ability. Russia, the Middle East, and Southeast Asia are T3 markets. However, the classification of markets was confirmed largely based on the experience of exporting games.

01

2021 Mobile Game Marketing Insights

/ 02

03

Insights into Top Countries/Regions Worldwide

/ 31

05

Industry Insights

/ 53

02

Insights into Advertising on Top Platforms Worldwide

/ 16

04

Trend of Ad Creatives for Mobile Games Worldwide

/ 47



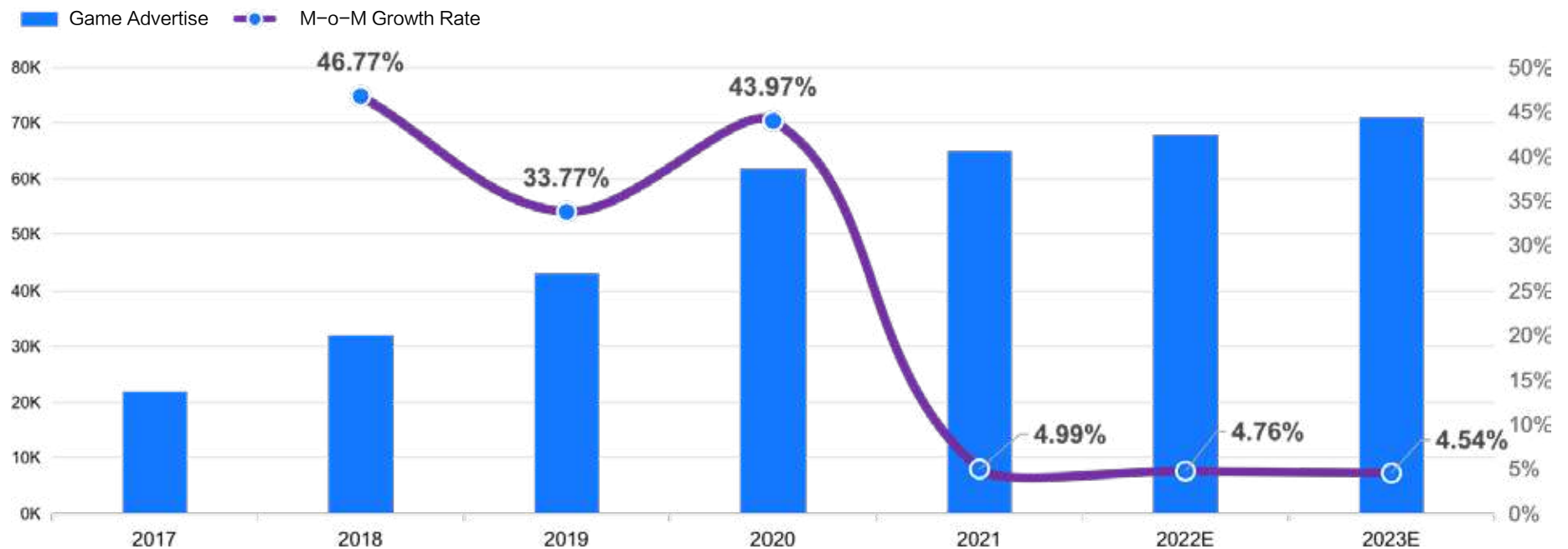


2021 Mobile Game Marketing Insights

A Slowdown in the Growth of Mobile Game Advertisers in the Post-Pandemic Era

There was a significant slowdown in the growth of mobile game advertisers in 2021, a YoY increase of 5% which was noticeably lower than last year's 44%. The market had maintained stable development in the Post-Pandemic Era. At this rate, the number of mobile game advertisers worldwide is expected to surpass 70K in 2023

Nearly 65K mobile game advertisers this year

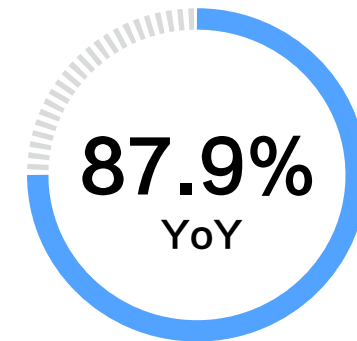
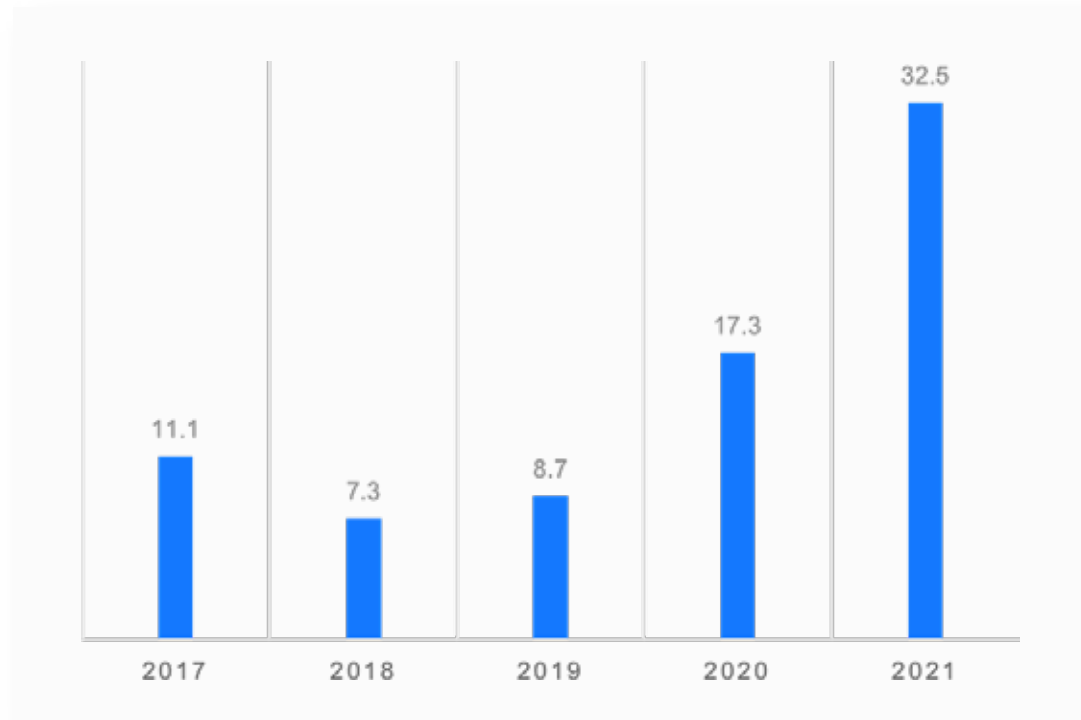


Source: SocialPeta, based on data retrieved from backend data sources
Date: 2017- 2021.

Average Duration of Creatives is 32.5 days

Average duration of creatives each year

The duration of creatives was getting longer as more and more “classic creatives” with longer duration released in market.



Average duration of creatives increased YoY in 2021



Average duration of creatives in 2021

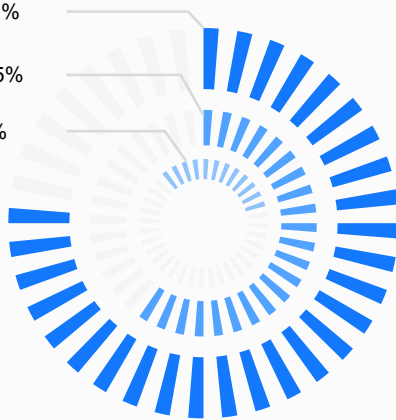
The proportion of Video Creatives Increase Year by Year

Users prefer to watch video ads nowadays when 5G networks have covered many countries/regions with the development of global mobile network technologies, video creatives have become the mainstream of advertising games as a result of the constant upgrading of mobile devices, and short video platforms and KOL influencers grew rapidly in 2021.

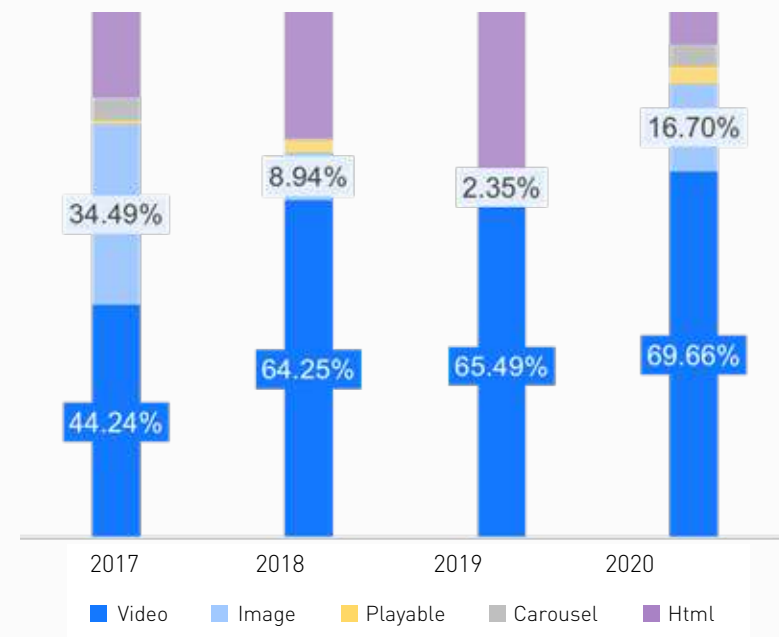
Number of video creatives in 2021: 5.6M+

Video creatives are often about (including but not limited to): GamePlay, real people scenario, UE4 videos, game trailer, KOL endorsement, game screenshots...

- Video 86.01%
- Image 11.65%
- Other 2.34%

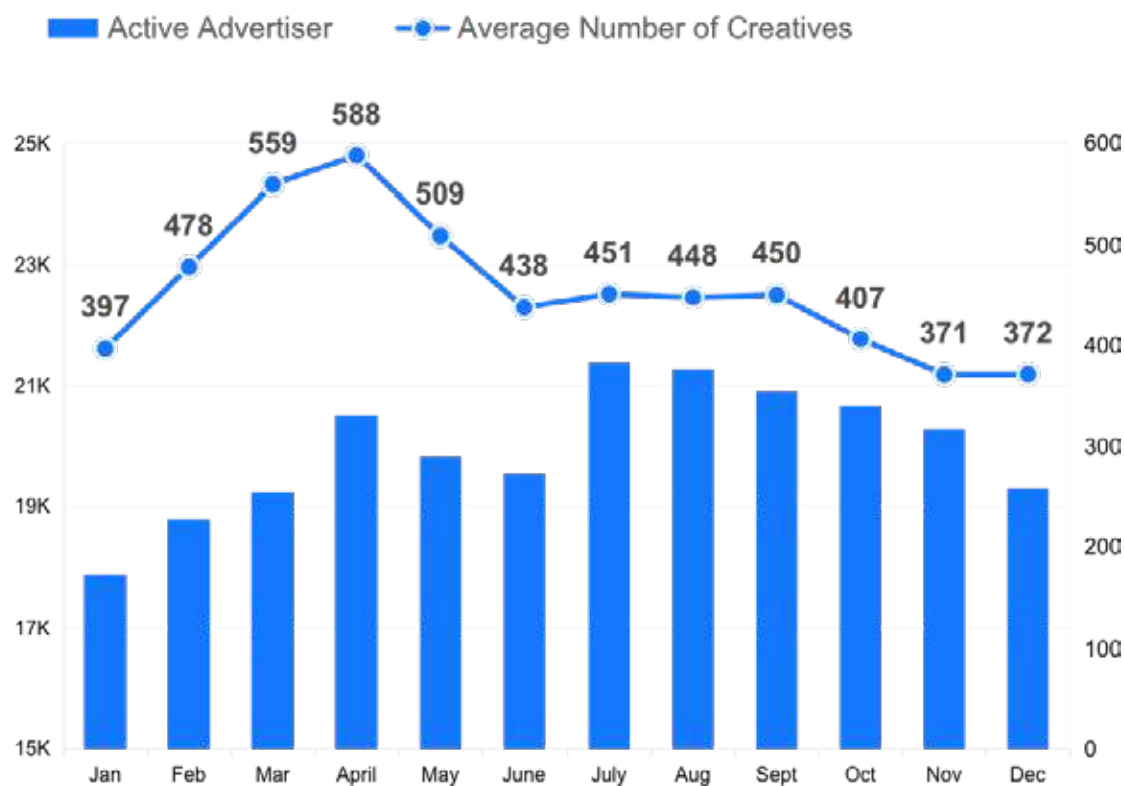


Share of mobile game creatives by type in 2021



Share of creatives by type each year

A Slowdown in Advertising Mobile Games in H2 2021



Active Advertisers

There were about 20K monthly active advertisers, with a peak of 21384 active advertisers in July, and January saw the least number of 17885 advertisers.

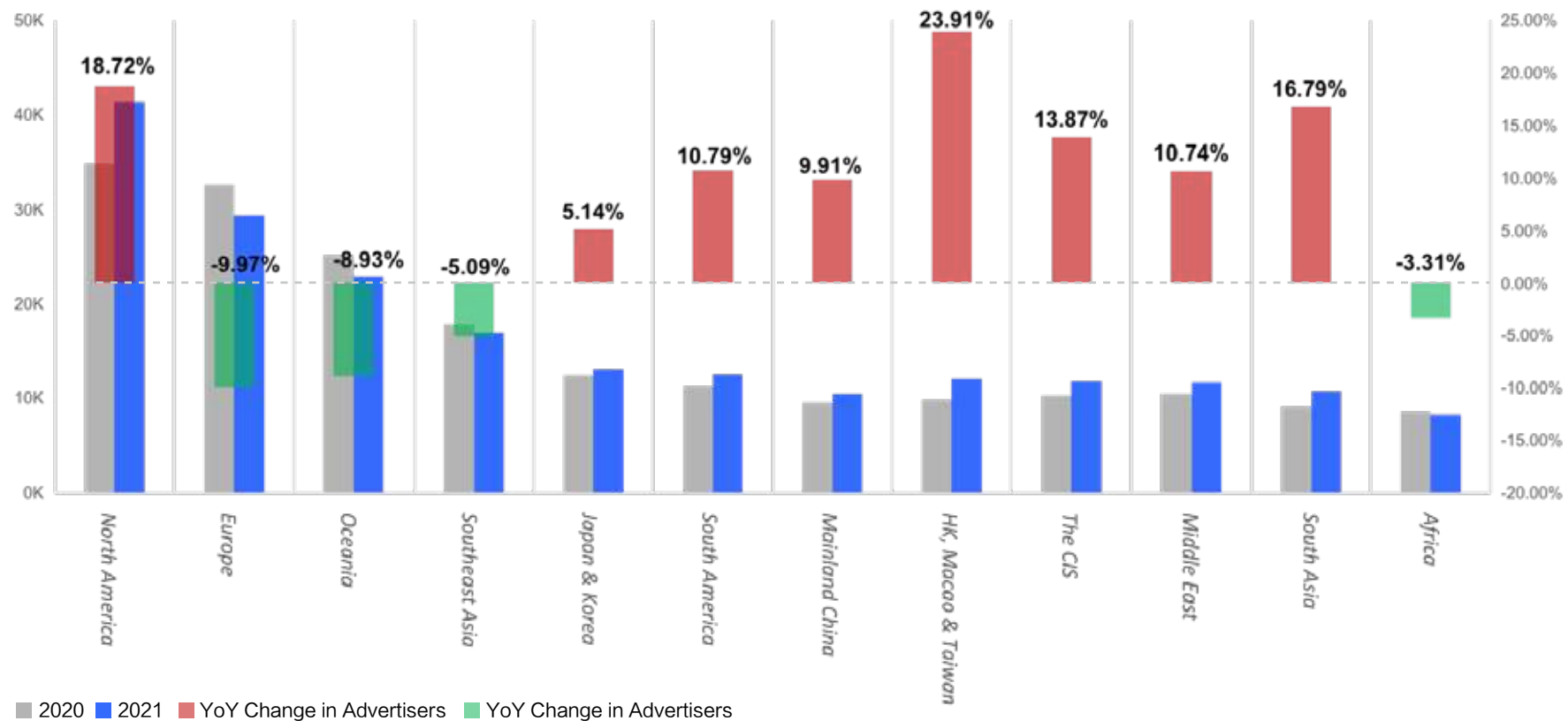
Average Number of Creatives

April saw the most ad creatives for a single advertiser, with an average of 588 creatives per mobile game advertiser. In H2 2021, average creatives for mobile games slowed down to reach 371 creatives per mobile game advertiser in November.

Source: SocialPeta, based on data retrieved from backend data sources
Date: Jan-Dec 2021.

Many Regions Saw a Rise in the Number of Game Advertisers

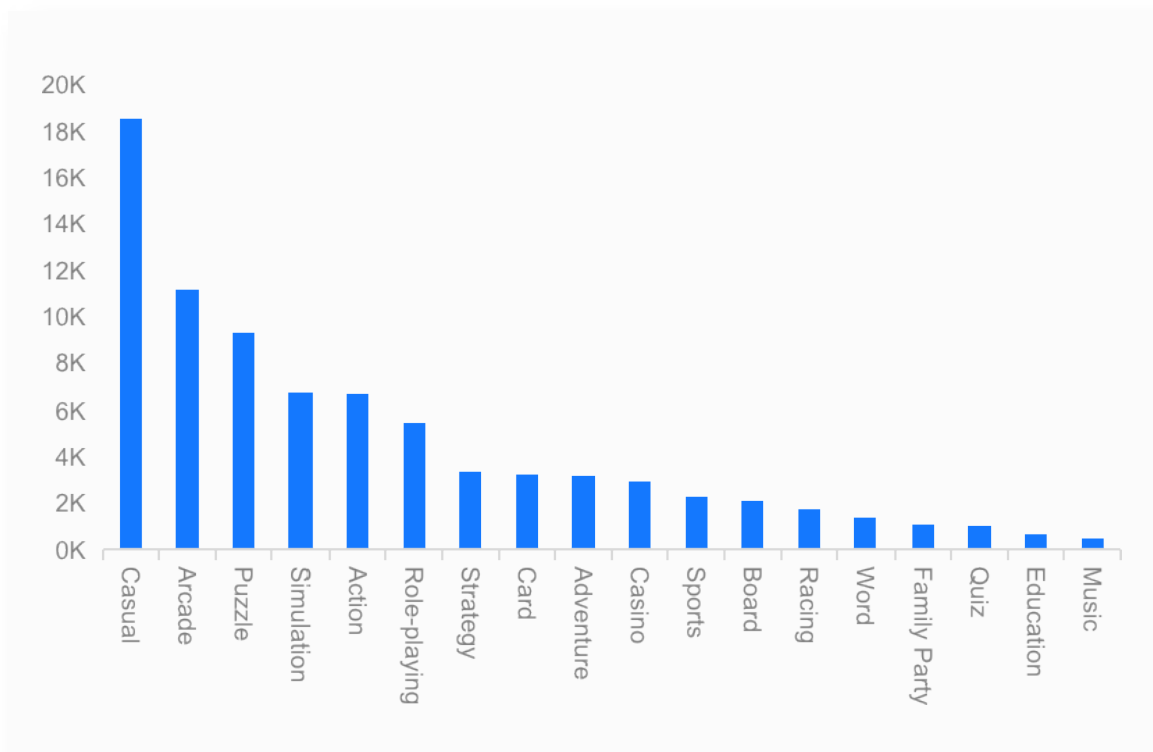
North America remained Top 1 with a total of over 41K mobile game advertisers, up 18.72% YoY. Europe, Oceania, Southeast Asia, and Africa had a decreased number of advertisers, with advertisers 3000 less than last year in Europe.



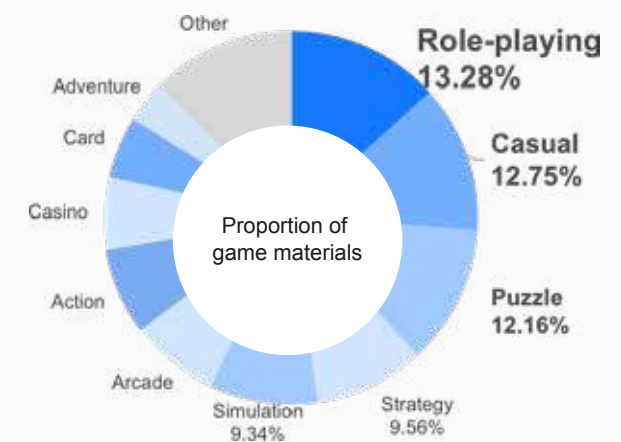
Source: SocialPeta, based on data retrieved from backend data sources
 Date: Jan-Dec 2021. The specific countries/regions will be presented later in this report.

Casual games had the most advertisers, while RPGs had the most creatives

Casual games had the most advertisers of over 18K

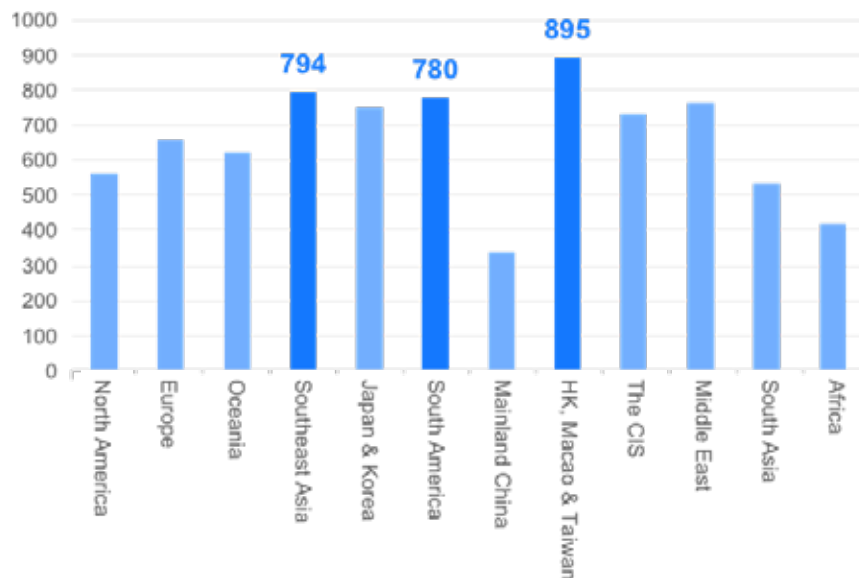


RPGs had the most creatives of totally over 6.6M, accounting for 13.28%; followed by casual games and puzzle games with creatives accounting for 12.75% and 12.16% respectively.



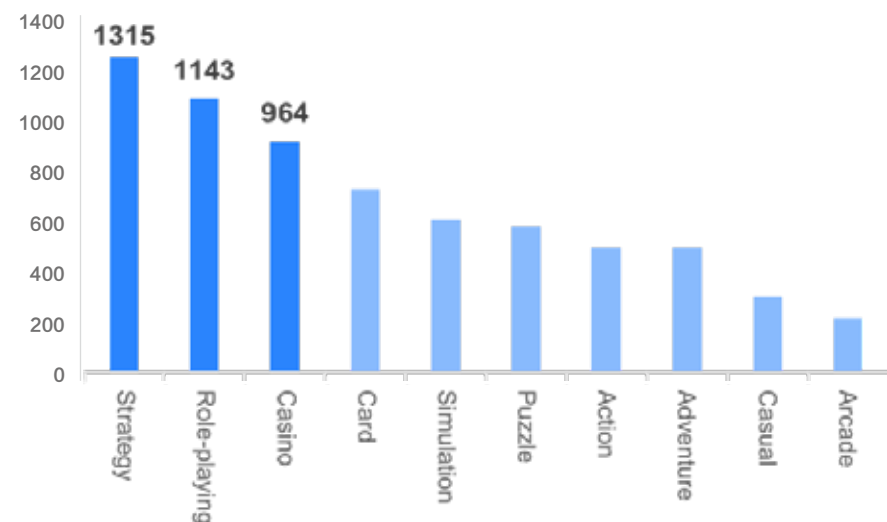
HK, Macao & Taiwan regions of China and strategy games had the most average creatives

Average ad creatives per advertiser worldwide



HK, Macao & Taiwan regions of China had an average of 895 creatives per advertiser. Followed by South America with 780 creatives per advertiser and Southeast Asia with 794 creatives per advertiser.

Average creatives for different game genres



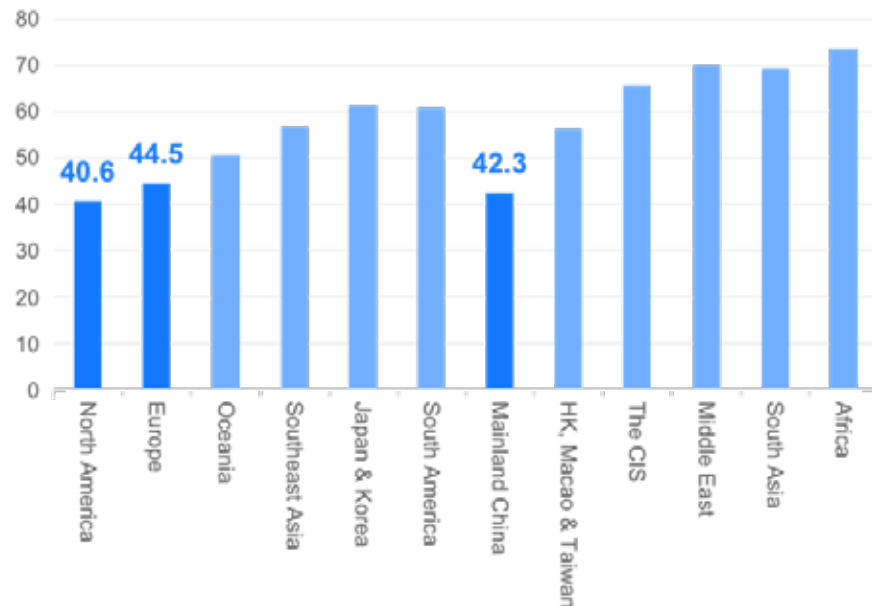
Strategy games maintained a large number of ad creatives, an average of 1315 creatives per advertiser; followed by role-playing games and casino games.

Source: SocialPeta, based on data retrieved from backend data sources

Date: 2021/1/-2021/12. The specific countries/regions will be presented later in this report.

Creatives in developed areas and for hard-core games were of a short duration

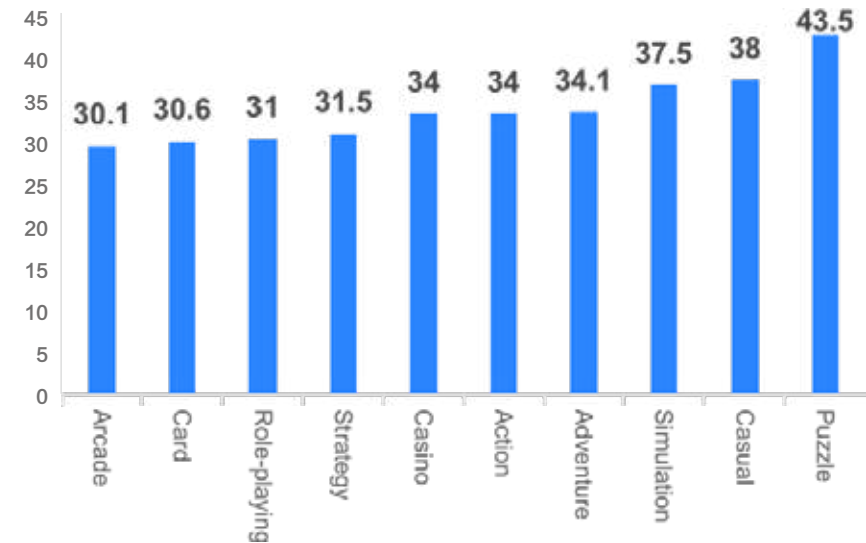
Duration of creatives worldwide (Day)



Creatives in North America were consumed the fastest, with an average duration of only 40.6 days

Followed by creatives in mainland China and Europe, with an average creative duration of 42.3 days and 44.5 days respectively.

Average duration of creatives for different game genres



Creatives for arcade games had the shortest average duration of only 30.1 days;

Followed by creatives for card games and role-playing games, with an average duration of 30.6 days and 31 days respectively.

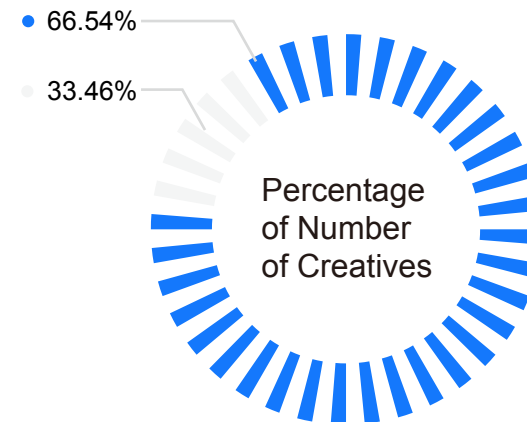
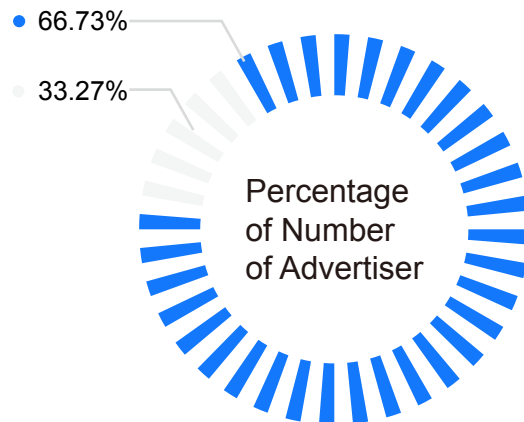
Source: SocialPeta, based on data retrieved from backend data sources

Date: Jan-Dec 2021. The specific countries/regions will be presented later in this report.

Apple IDFA Tremendously Impacted the Advertising of iOS Advertisers

Android advertisers greatly outnumbered iOS advertisers, accounting for 66.73%

Average creatives per advertiser on Android were close to that on iOS as more game companies chose to place ads on Android



Android

542

Average Creatives per Advertiser

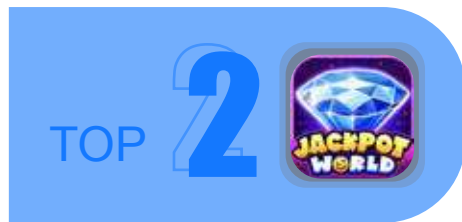
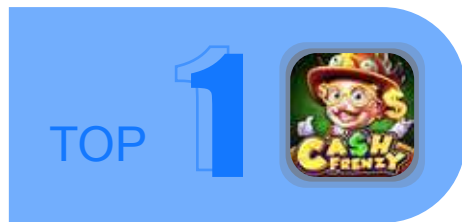












iOS











548











Comparison of the number of creatives

Global Mobile Games by Advertising TOP30 (iOS)



iOS		
1		Cash Frenzy™ BoleGaming
2		Jackpot World™ BoleGaming
3		Mafia City Yotta Games
4		Lotsa Slots™ BoleGaming
5		Idle Arks Bianfeng Games
6		The Grand Mafia Yotta Games
7		Jackpot Crush BoleGaming
8		Kiss of War Tap4Fun
9		Coloring Book! Doodle Mobile
10		Rise of Kingdoms Lilith Games

iOS		
11		雲之歌 SpringGame
12		Chapters COL
13		Sniper 3D Wildlife Studios
14		Vegas Friends BoleGaming
15		Solitaire MobilityWare
16		War Machines Wildlife Studios
17		Pocket7Games AviaGames
18		Mergical Beta Games
19		Cash Tornado™ LuckiosGame
20		Block Puzzle Doodle Mobile

iOS		
21		Project Makeover Magic Tavern
22		War Robots Pixonic
23		Tennis Clash Wildlife Studios
24		Animal Restaurant DHGames
25		Bingo Clash AviaGames
26		Meeerge Beta Games
27		Match 3D Lion Studios
28		Texas Hold'em Poker KamaGames
29		Kina's Throne Goat Games
30		Hero Wars Nexters

Note: Advertisers are sorted by the number of deduplicated creatives

Top 20 Mobile Games on App Store by Downloads and Revenue



Source: SocialPeta--App Intelligence. The downloads and revenue were generated on the App Store
Date: Jan-Dec 2021.

Mobile Games Worldwide by Advertising TOP30 (Android)



Note: Advertisers are sorted by number of deduplicated creatives

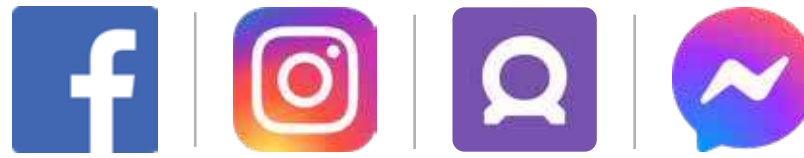
Top 20 Mobile Games on Google Play by Downloads and Revenue



Source: SocialPeta-APP Intelligence. The downloads and revenue were generated on Google Play, excluding any third-party Android platforms.
Date: Jan-Dec 2021.



Insights into Advertising on Top Platforms Worldwide



Meta Platforms

As the first app that surpassed 2 billion MAU worldwide, Facebook itself has a fairly large amount of traffic, not to mention the platforms owned by it, including Instagram with over 1 billion MAU, Audience Network with over 0.1 billion MAU, and also the well-known social messaging tool, Messenger.

On October 28, 2021, Facebook announced that it was rebranding partly as “Meta.”

Top 10 Advertisers on Meta Platforms



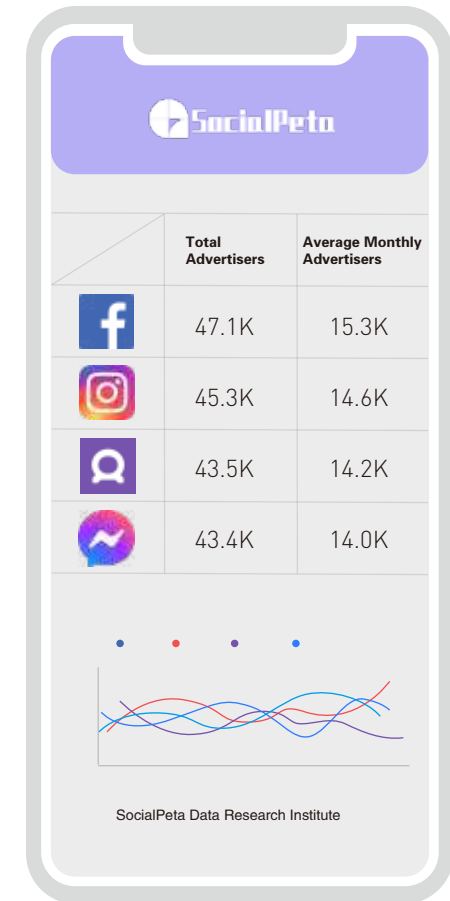
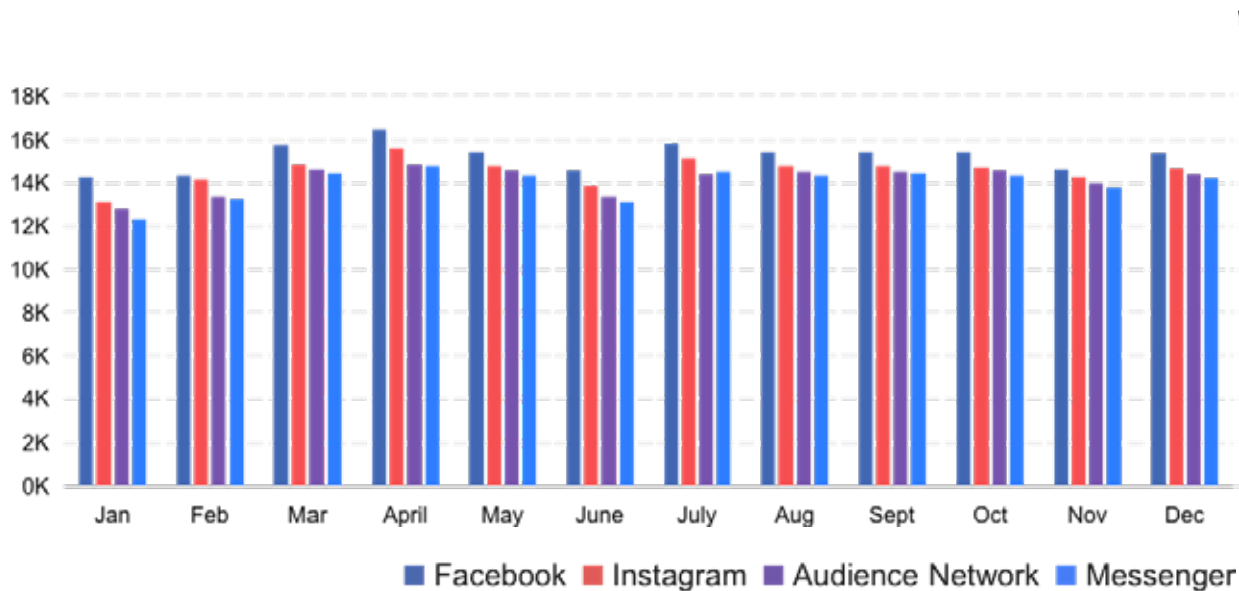
Source: SocialPeta--Advertiser Analysis; sorted by the total popularity of creatives

Date: Jan-Dec 2021. Popularity: it is a numerical value related to ad duration, views, and market effect. Creatives with a higher popularity are more competitive.

Meta Platforms Had the Most Game Advertisers Worldwide

Number of game advertisers on Meta in 2021

47.1K+



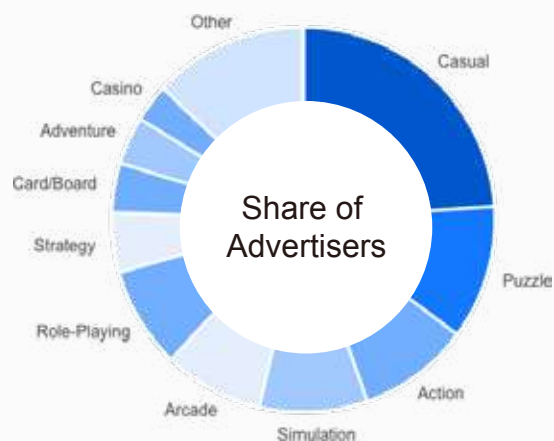
Source: SocialPeta, based on data retrieved from backend data sources
Date: Jan-Dec 2021.

Insights into Advertising of Mobile Games by Genre on Meta Platforms

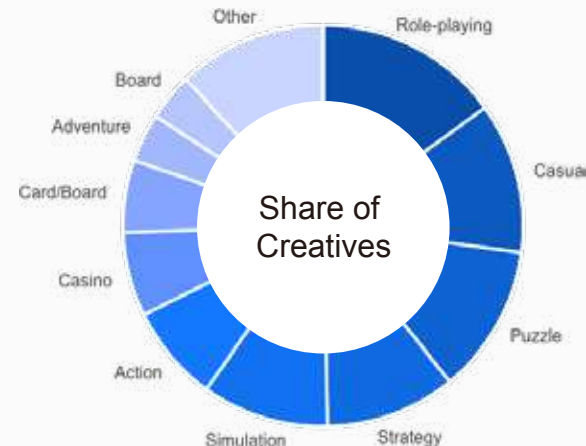
Casual games had the most advertisers; RPGs had the most creatives

Casual game advertisers were the most, a total of over 51.8K advertisers accounting for 17.24%. Followed by advertisers of puzzle games and action games, accounting for 8.15% and 6.78% respectively.

RPGs had the most creatives, a total of 5.8M creatives accounting for 14.95%. And RPG advertisers were about 18.2K.



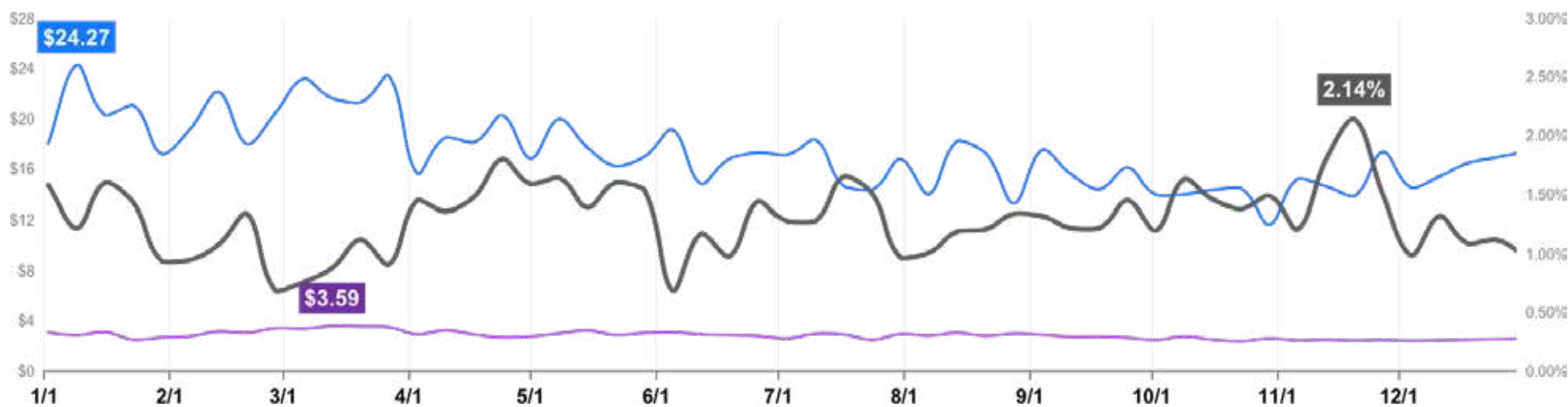
● Casual: 17.24% ● Puzzle: 8.15% ● Action: 6.78%



● Role-Playing: 14.95% ● Casual: 12.21% ● Puzzle: 11.95%

Advertising Cost Trends of Mobile Games on Meta Platforms

Advertising cost increased; CPM increased by 34% YoY.



CPC(\$)

An average of \$2.88
up 81% YoY



CTR(%)

An average of 1.28%
down 29% YoY



CPM(\$)

An average of \$20.99
up 34% YoY

Advertising Cost Trends of Mobile Games on Meta Platforms

Average CPM for mobile games in the US surpassed **\$28**

Mobile games in the US had the highest advertising cost, with an average CPM of \$28.18, CPC of \$4.42, and CTR of 1.08%.

Overall, the US had the highest advertising cost, with CPM increasing by 93% as compared to last year.

CPM increased in Asian-Pacific countries/regions which occupied half of the Top 10 spots.

Country/Region	CPM (\$)	CPC (\$)	CTR (%)
USA	28.18	4.42	1.08
Australia	27.2	4.13	1.17
Japan	25.84	4.06	0.98
South Korea	24.73	3.7	1.06
Canada	23.31	3.65	1.12
Hong Kong (China)	23.05	3.6	1.07
Taiwan (China)	22.66	3.78	0.86
Singapore	22.03	2.75	1.7
Germany	21.33	3.08	1.54
UK	19.49	3.37	1.14

(Sorted by CPM from high to low)



Google Platforms

It's become a habit for overseas people to "Google it" whenever they are planning to do something, go somewhere, or buy something. It's important to seize the critical moment and present your digital ads properly and timely on Google when people are Googling products or services that you can offer.

Whether on computers or mobile devices, a timing ad can help convert people into valuable customers.

In November 2006, Google acquired YouTube for \$1.65 billion, making YouTube one of its subsidiaries.

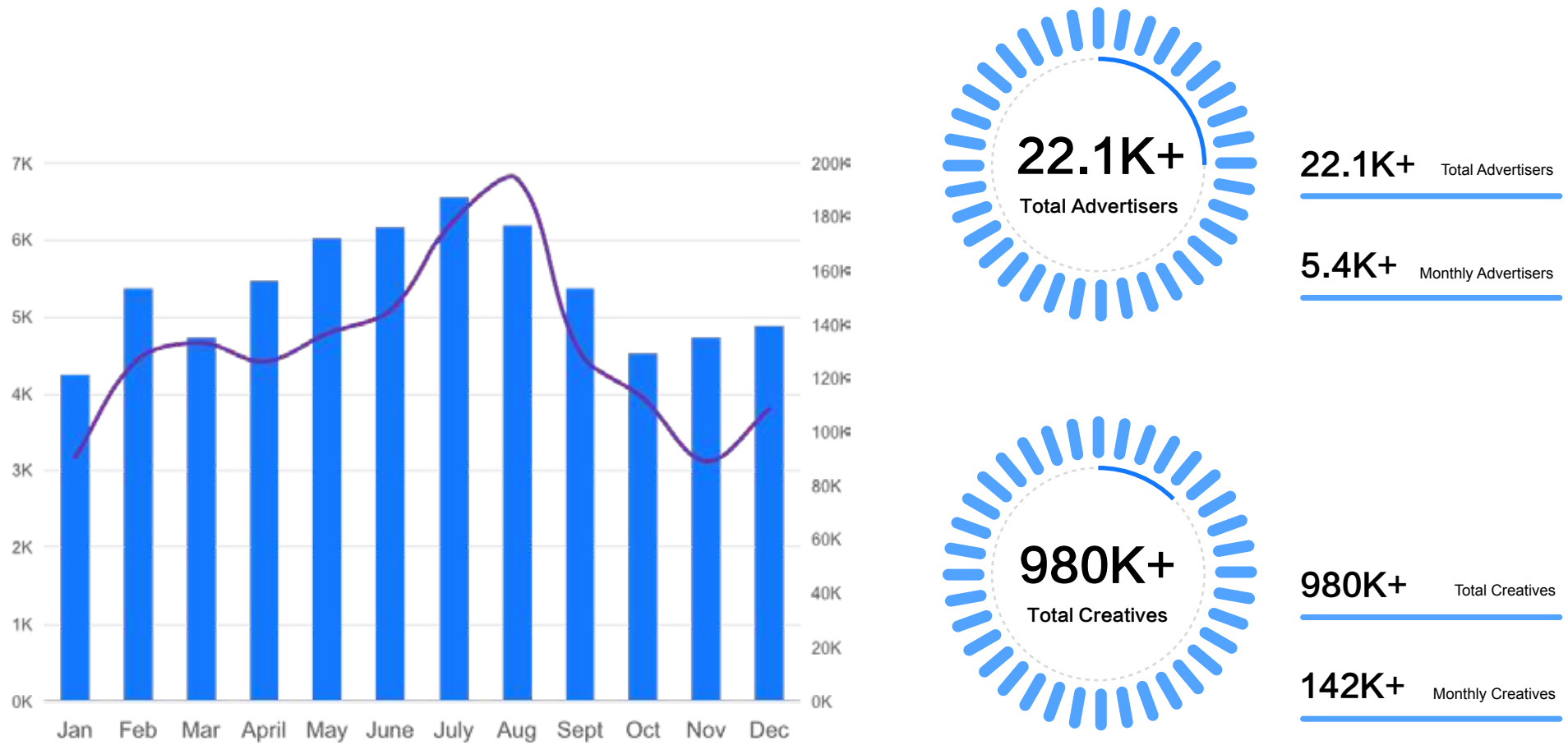
Top 10 Advertisers on Google Platforms



Source: SocialPeta--Advertiser Analysis; sorted by the popularity of all creatives

Date: Jan-Dec 2021. Popularity: it is a numerical value related to ad duration, views, and market effect. Creatives with a higher popularity are more competitive.

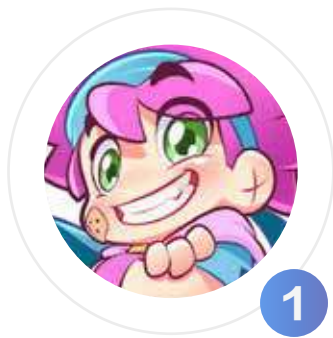
Insights into Media Buying of Mobile Games on Admob



Source: SocialPeta, based on data retrieved from backend data sources
 Date: Jan-Dec 2021.

Popular KOL about Games on YouTube

Good KOL can help products quickly enter local markets



1

invictor

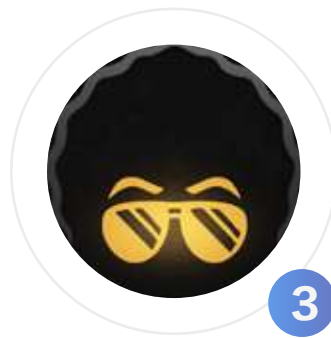
Subscribers 15.1M
Spain, Spanish



2

Mythpat

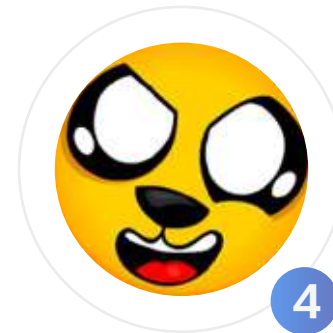
Subscribers 10.9M
India, English



3

AboFlah

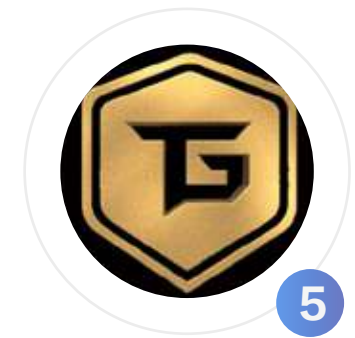
Subscribers 22.6M
Spain, Spanish



4

Mikecrack

Subscribers 29.8M
Kuwait, Arabic



5

Techno Gamerz

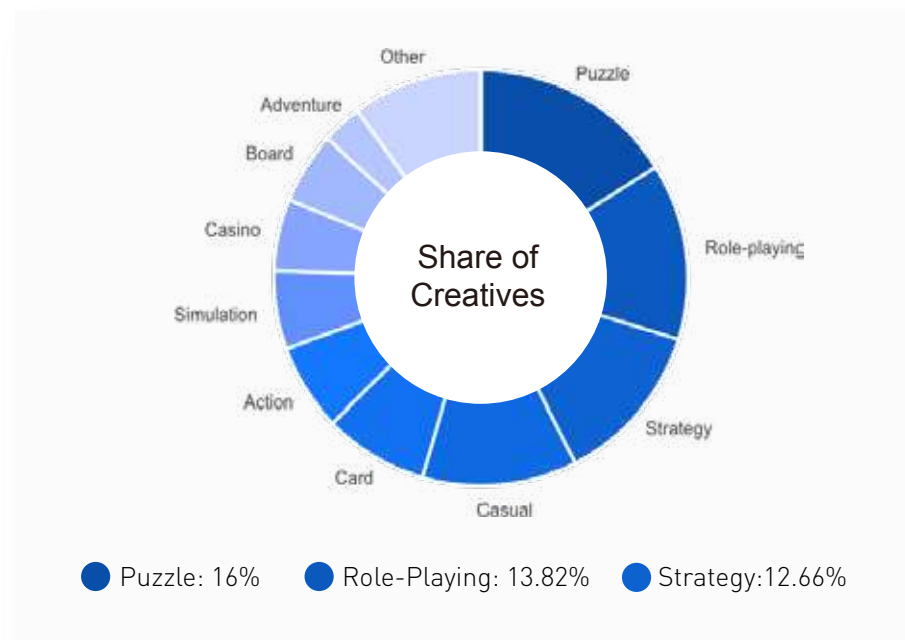
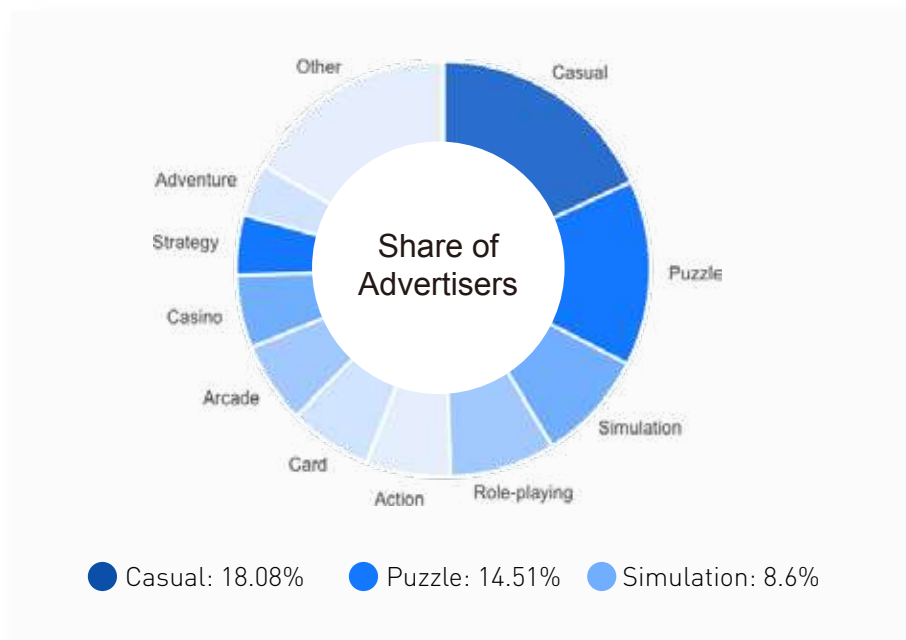
Subscribers 23.1M
India, English

Insights into Media Buying of Mobile Games by Type on Platforms Owned by Google

Casual games had the most advertisers; Puzzle games had the most creatives

Casual game advertisers were the most, a total of over 4.7K advertisers accounting for 18.08%. Followed by advertisers of puzzle games and simulation games, accounting for 14.51% and 8.6% respectively.

Puzzle games had the most creatives, a total of nearly 180K creatives accounting for 16%. And puzzle game advertisers were about 4.0K.

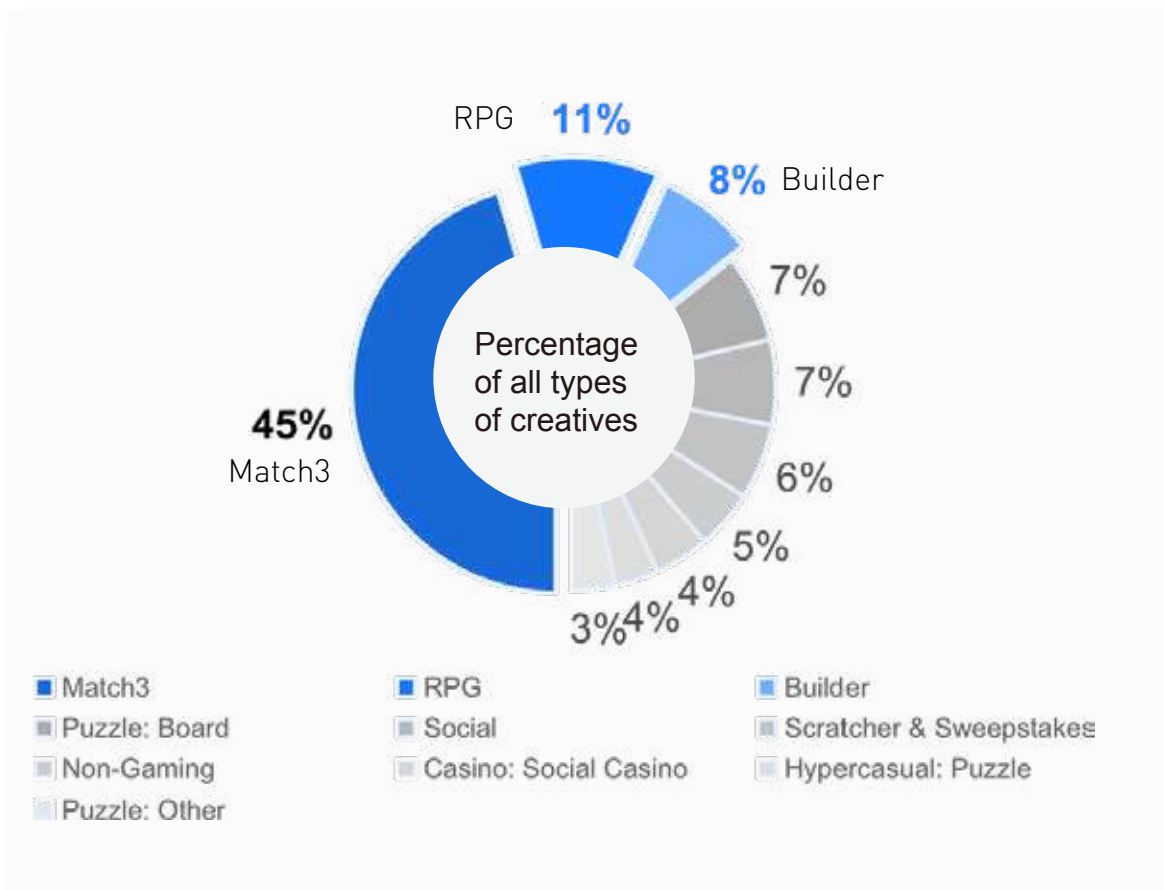




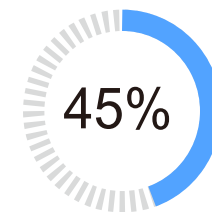
Vungle is a trustworthy global mobile Internet advertising platform dedicated to providing superior traffic monetization and helping advertisers acquire highly active and high-quality users. Vungle is also committed to changing how users receive in-app ads. With Vungle's unique and innovative advertising format, developers can maximize the monetization of in-app traffic. Vungle is a platform on which advertisers display their ads globally in order to acquire new users and retain valuable users.

Data-oriented and based on user experience, Vungle has been creating innovative ad forms, ad creatives, and other products. So far, ad creatives on Vungle have reached more than 1 billion mobile devices, bringing visitors and revenue to advertisers and traffic sellers. Vungle is headquartered in San Francisco, USA, with branches in many places worldwide, including Beijing, London, Berlin, Tokyo, Seoul, Singapore, Los Angeles, New York, and Helsinki.

Percentage of All Types of Creatives on Vungle

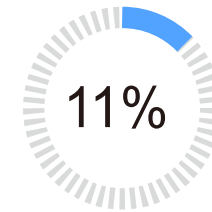


Mid-core and hard-core games (RPG & Builder) are one of the major types of games on Vungle



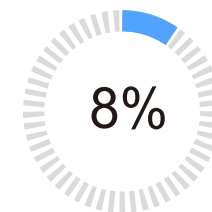
Match3

With the most creatives accounting for 45%



RPG

With the second most creatives accounting for 11%



Builder

Accounting for 8%

Overview of Creatives for Mid-Core & Hard-Core Mobile Games on Vungle

In terms of the ad forms for mid & hard core games, the conversion rates of horizontal videos and vertical videos are very close. But it can be seen from the percentage of ad creatives that vertical video ads are clearly superior. Overall, video ads are indispensable to advertising Mid-Core & Hard-Core games. Developers are advised to choose vertical video ads at early stages to increase the exposure of their products.

As far as video lengths are concerned, videos of over 30 seconds achieve the best performance and the highest conversion rate. Because it's the least time needed to fully explain the complicated gameplay of integrated games currently in the market.

And, ads with end cards have a clear advantage in conversion rate, and are indispensable to Mid-Core & Hard-Core games.

Orientation of Videos

Conversion rates of horizontal and vertical videos: 0.02% & 0.15%.
Vertical videos have enduring appeal.

Ad Forms

Conversion rates of rewards and interstitials: 0.14% & 0.15%.
Video ads are indispensable.

Video Length

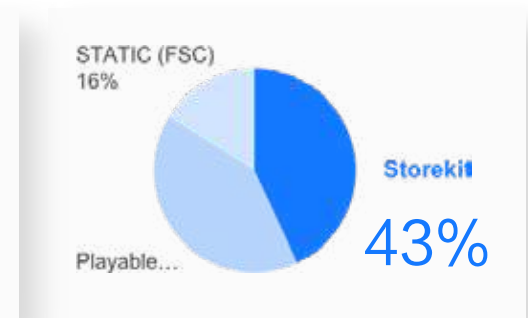
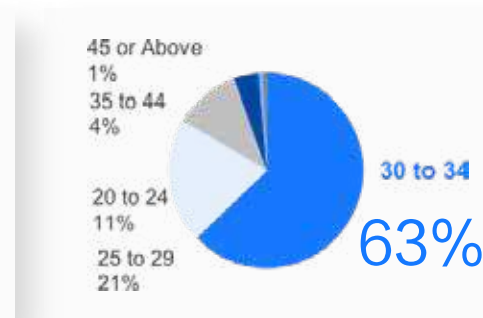
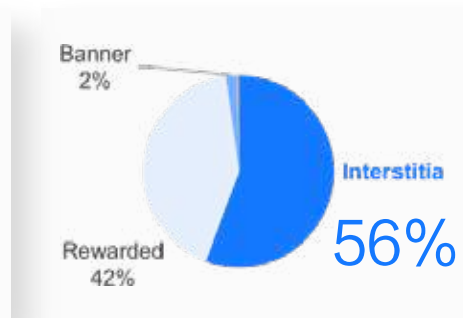
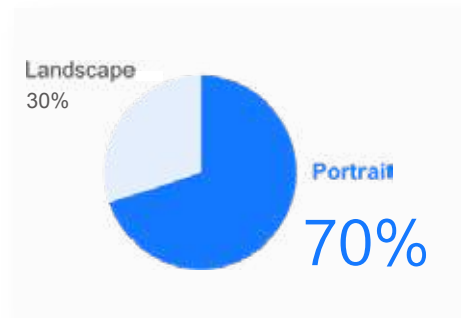
Overall, videos of over 30 seconds achieve the best performance.

Video Length	Conversion Rate
30 to 34	0.15%
25 to 29	0.10%
20 to 24	0.14%
35 to 44	0.06%

End Card

Storekit (iOS) is No. 1.
Playable ads are indispensable to medium & heavy games.

End-Card	Conversion Rate
Storekit	0.12%
Playable	0.37%
STATIC (FSC)	0.14%





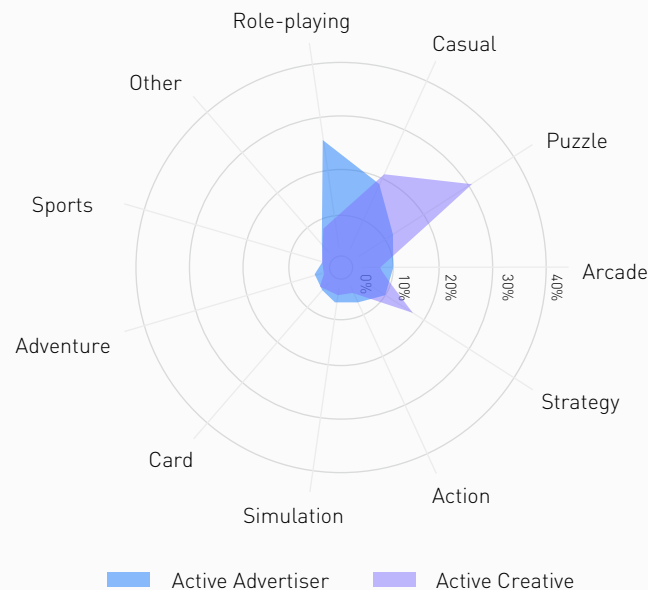
Insights into Top Countries/Regions Worldwide

Insights into Mobile Game Advertisers in Mainland China

Due to [changes in version numbers and marketing patterns](#), advertisers in mainland China have begun to transfer from legend and Xianxia games to [money-making and casual](#) games.

Share of advertising by game genres

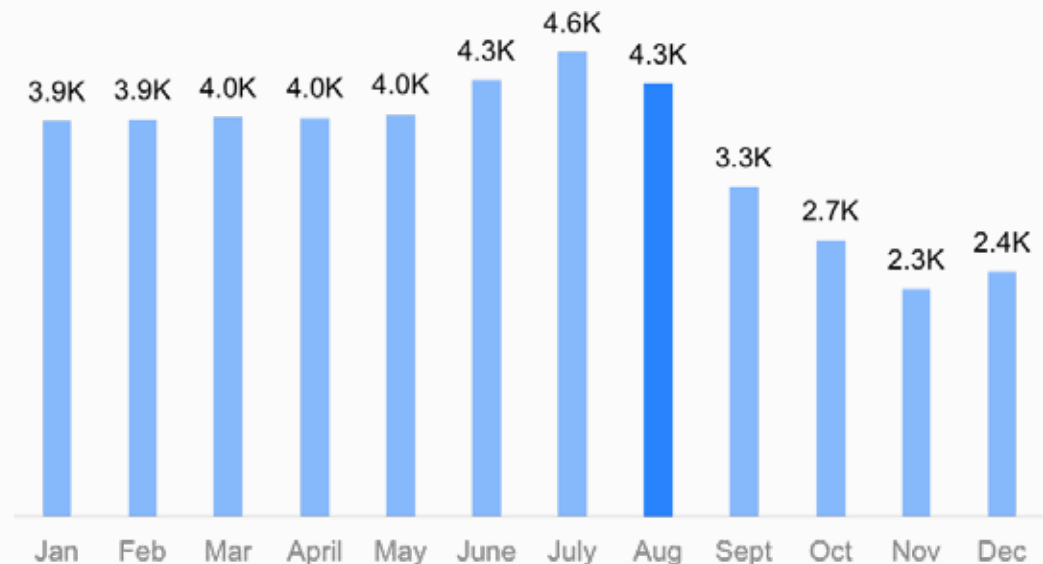
RPGs had the most advertisers, accounting for 23%; while puzzle games had the most creatives, accounting for over 30%.



Number of advertisers each month

The total number of advertisers in 2021 was 10.5K; with 3.7K monthly advertisers.

In H2 2021, advertisers reduced significantly due to tightened regulation in mainland China.



Top 10 Mobile Games in Mainland China



Advertising TOP10	
1	爷爷的小农场
2	秀才猜成语
3	好大一把剑
4	疯狂娱乐城
5	粘土模拟器
6	多多成语
7	我的饭店
8	魔性小飞机
9	阿伟消消乐
10	三国志·战略版

Downloads TOP10	
1	王者荣耀
2	和平精英
3	开心消消乐®
4	欢乐斗地主
5	使命召唤手游
6	贪吃蛇大作战
7	英雄联盟手游
8	我的世界
9	原神
10	QQ飞车

Revenue TOP10	
1	王者荣耀
2	和平精英
3	梦幻西游
4	三国志·战略版
5	原神
6	天涯明月刀
7	万国觉醒
8	一念逍遥
9	大话西游
10	穿越火线:枪战王者

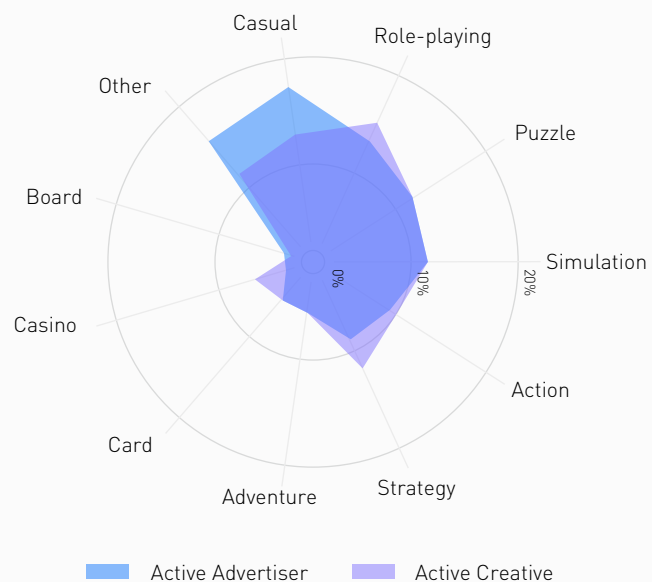
Source: Chinese version of SocialPeta, based on data retrieved from backend data sources
 Date: Jan-Dec 2021. The downloads and revenue were generated on the App Store

Insights into Mobile Game Advertisers in HK, Macao, and Taiwan

Advertising of **RPGs** played an important role in the markets of HK, Macao, and Taiwan

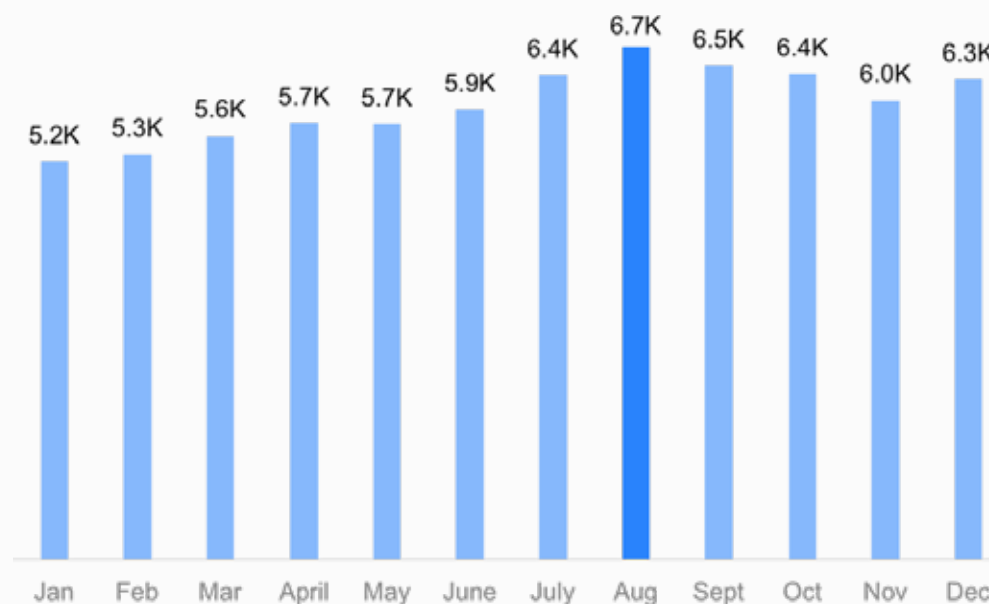
Share of advertising by game genres

Casual games had the most advertisers, accounting for 17%; while RPGs had the most creatives, accounting for over 15%.



Number of advertisers each month

The total number of advertisers in 2021 was 12.1K, with 6K monthly advertisers.



Top 10 Mobile Games in HK, Macao, and Taiwan Regions of China



Advertising TOP10

1		大極娛樂城
2		雲之歌
3		萬國寶通
4		帝國曙光
5		Cash Frenzy™
6		機甲戰隊 [War Robots]
7		夢幻水族箱
8		新仙俠：起源
9		Kiss of War
10		聖鬥士星矢：正義傳說

Downloads TOP10

1		Coin Master
2		Garena 傳說對決
3		哈利波特：魔法覺醒
4		忍者必須死
5		PUBG: NEW STATE
6		Project Makeover
7		英雄聯盟：激鬥峽谷
8		貪吃蛇進化論
9		Play Together
10		絕地求生M

Revenue TOP10

1		Coin Master
2		三國志·戰略版
3		Garena 傳說對決
4		RO仙境傳說：新世代的誕生
5		天堂2M
6		星城Online
7		雲上城之歌
8		Genshin Impact
9		明星捕魚-麻將明星3缺1
10		叫我大冚櫃

Downloads TOP10

1		忍者必須死
2		Coin Master
3		PUBG: NEW STATE
4		世界計畫 繽紛舞台！
5		哈利波特：魔法覺醒
6		斗羅大陸3D：魂師對決
7		Re:從零開始的異世界生活
8		命運之輪
9		模型少女AWAKE
10		Merge Snake !

Revenue TOP10

1		天堂M
2		Coin Master
3		天堂2M
4		星城Online
5		三國志·戰略版
6		雲上城之歌
7		RO仙境傳說：新世代的誕生
8		新射擊群俠傳之龍血丹心
9		Genshin Impact
10		新仙俠：起源

Source: SocialPeta, based on data retrieved from backend data sources

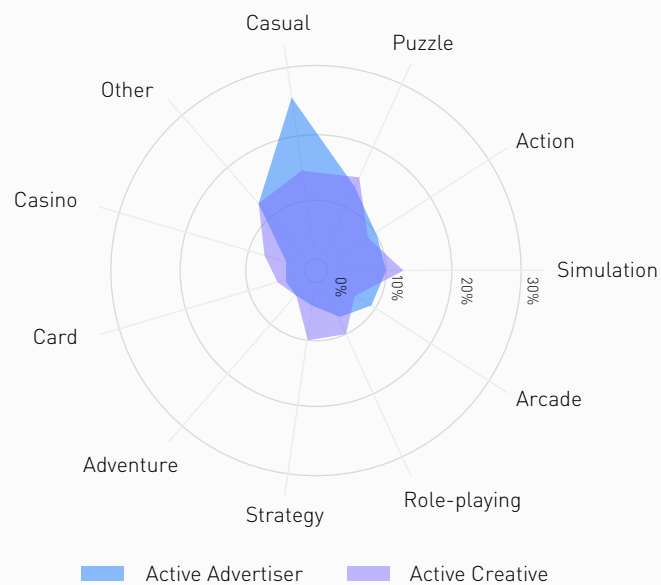
Date: Jan-Dec 2021. The downloads and revenue were generated on the App Store and Google Play, excluding any third-party Android platforms.

Insights into Media Buying of Mobile Games in the USA

Casual and puzzle games had the most advertisers and creatives

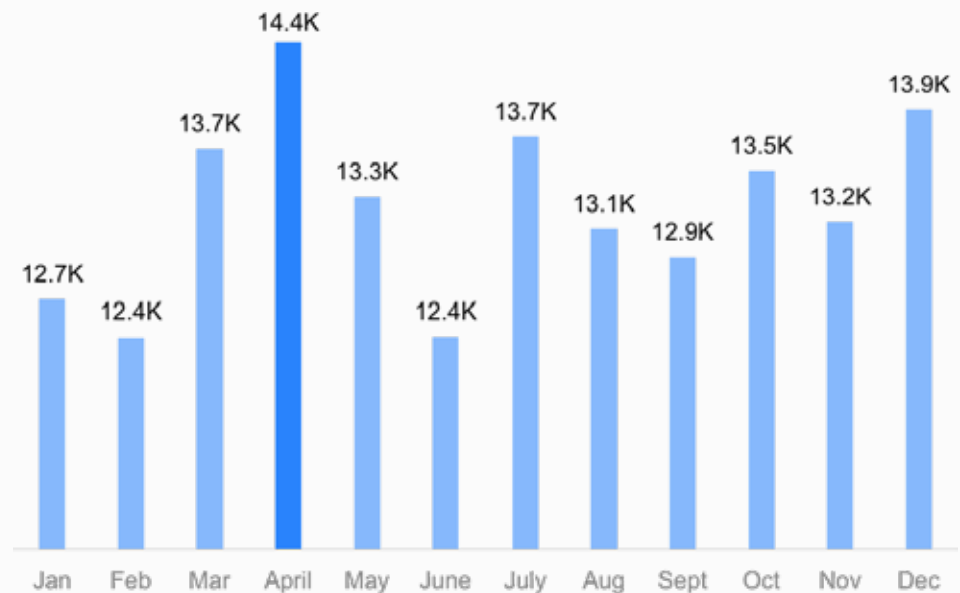
Share of advertising by game genres

Casual games had the most advertisers and creatives, accounting for 26% and 15% respectively.



Number of advertisers each month

The total number of advertisers in 2021 was 40.4K, with 13.3K monthly advertisers.



Top 10 Mobile Games in the USA



Advertising TOP10	
1	Cash Frenzy™
2	Jackpot World™
3	Lotsa Slots
4	Tap Color Pro
5	Jackpot Crush
6	Idle Arks
7	Coloring Book
8	Rise of Empires
9	Vegas Friends
10	Hair Challenge

Downloads TOP10	
1	Roblox
2	Project Makeover
3	Among Us!
4	Subway Surfers
5	High Heels!
6	Call of Duty®: Mobile
7	Magic Tiles 3
8	Bridge Race
9	Paper Fold
10	Hair Challenge

Revenue TOP10	
1	Roblox
2	Candy Crush Saga
3	Clash of Clans
4	Genshin Impact
5	Garena Free Fire
6	Pokémon GO
7	Homescapes
8	Coin Master
9	Call of Duty®: Mobile
10	Clash Royale

Downloads TOP10	
1	Roblox
2	Among Us
3	Project Makeover
4	Magic Tiles 3
5	High Heels!
6	Phone Case DIY
7	Bridge Race
8	Count Masters - Stickman Clash
9	Hair Challenge
10	Pull the Pin

Revenue TOP10	
1	Coin Master
2	Candy Crush Saga
3	Garena Free Fire
4	Roblox
5	Lords Mobile
6	Bingo Blitz™
7	RAID
8	Homescapes
9	Pokémon GO
10	State of Survival

Source: SocialPeta, based on data retrieved from backend data sources

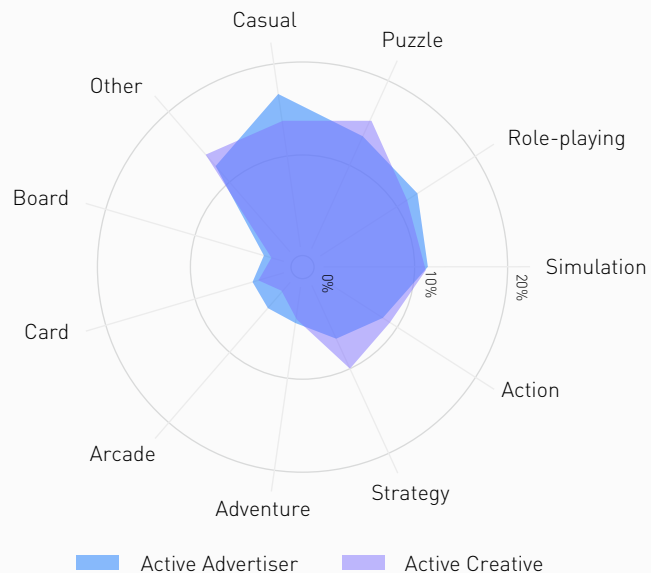
Date: Jan-Dec 2021. The downloads and revenue were generated on the App Store and Google Play, excluding any third-party Android platforms.

Insights into Advertising of Mobile Games in Japan & South Korea

More **strategy game advertisers** in Japan, while more **RPGs** advertisers in South Korea

Share of advertising by game type

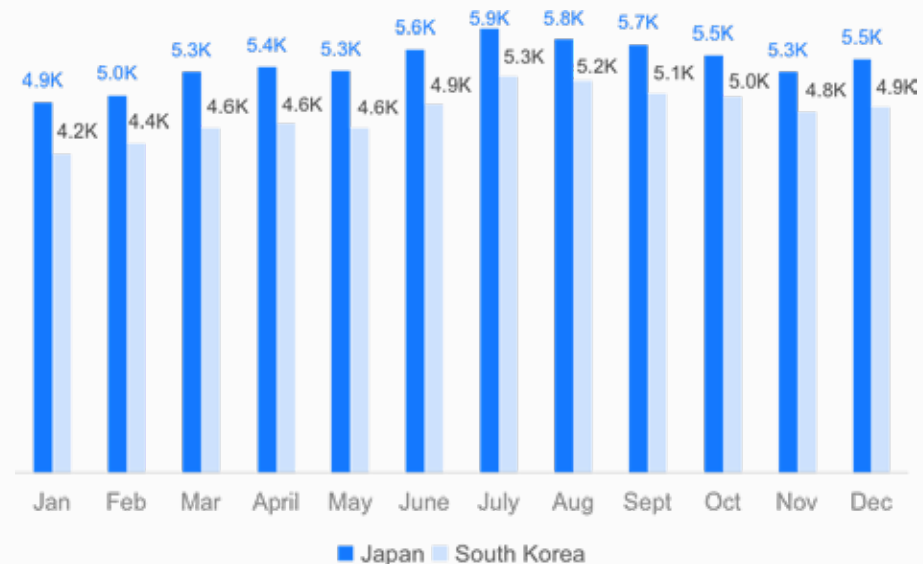
Casual games and puzzle games had the most advertisers in Japan and South Korea. There were more RPGs advertisers in South Korea and more strategy games advertisers in Japan.



Number of advertisers each month

The total number of advertisers in Japan in 2021 was 10.9K, with 5.4K monthly advertisers.

The total number of advertisers in South Korea in 2021 was 9.6K, with 4.8K monthly advertisers.



Top 10 Mobile Games in Japan



Advertising TOP10

1	War Robots PvP マルチプレイ
2	Braindom 2
3	Braindom
4	千秋伝説・仙崎
5	トップウォー
6	極道風雲
7	ガーデンスケイプ
8	パズルサバイバル
9	パズにゃん
10	美女と栄光

Downloads TOP10

1	ウマ娘 プリティーダービー
2	Among Us!
3	Project Makeover
4	Parking Jam 3D
5	プロジェクトセカイ カラフルステージ!
6	Save them all
7	LINE: ディズニー ツムツム
8	Beat Run! Pop Music Rush
9	東方ダンマクカグラ (ダンカグ)
10	NieR Re[in]carnation

Revenue TOP10

1	ウマ娘 プリティーダービー
2	モンスターストライク
3	プロ野球スピリッツA
4	Knives Out
5	パズル&ドラゴンズ
6	Fate/Grand Order
7	Genshin Impact
8	Pokémon GO
9	ドラゴンクエストウォーク
10	プロジェクトセカイ カラフルステージ!

Downloads TOP10

1	ウマ娘 プリティーダービー
2	Puzzles & Survival
3	NieR Re[in]carnation
4	東方ダンマクカグラ (ダンカグ)
5	Tile Connect
6	Among Us
7	Parking Jam 3D
8	Beat Run! Pop Music Rush
9	Project Makeover
10	Woodoku

Revenue TOP10

1	ウマ娘 プリティーダービー
2	Fate/Grand Order
3	モンスターストライク
4	ドラゴンクエストウォーク
5	パズル&ドラゴンズ
6	Genshin Impact
7	放置少女
8	プロ野球スピリッツA
9	ドラゴンボールZ ドッカンバトル
10	Pokémon GO

Source: SocialPeta, based on data retrieved from backend data sources

Date: Jan-Dec 2021. The downloads and revenue were generated on the App Store and Google Play, excluding any third-party Android platforms.

Top 10 Mobile Games in South Korea



Advertising TOP10	
1	키소브워
2	Braindom 2
3	카르마M
4	오드 부 히어로즈
5	브레인돌
6	War Robots PvP 멀티 플레이어
7	전삼국
8	신명2
9	기동전대
10	머지스토리

Downloads TOP10	
1	Cookie Run: Kingdom
2	Rummikub
3	KartRider Rush+
4	제2의 나라: Cross Worlds
5	PUBG: NEW STATE
6	Infinite Stairs
7	PUBG MOBILE
8	Roblox
9	원펀맨: 최강의 남자
10	TFT: Teamfight Tactics

Revenue TOP10	
1	Cookie Run: Kingdom
2	리니지M
3	오단: 발할라 라이징
4	제2의 나라: Cross Worlds
5	Genshin Impact
6	리니지2M
7	FIFA ONLINE 4 M by EA SPORTS™
8	KartRider Rush+
9	라이즈 오브 킹덤즈
10	바람의나라: 연

Downloads TOP10	
1	제2의 나라: Cross Worlds
2	Cookie Run: Kingdom
3	PUBG: NEW STATE
4	원펀맨: 최강의 남자
5	마이리플프로젝트
6	Blue Archive
7	피니싱: 그레이 레이븐
8	미니어스
9	Re:제로부터 시작하는 이세계 생활
10	그랑사가

Revenue TOP10	
1	리니지M
2	오단: 발할라 라이징
3	리니지2M
4	기적의 검
5	Lineage W
6	Cookie Run: Kingdom
7	세븐나이츠2
8	제2의 나라: Cross Worlds
9	Genshin Impact
10	라이즈 오브 킹덤즈

Source: SocialPeta, based on data retrieved from backend data sources

Date: Jan-Dec 2021. The downloads and revenue were generated on the App Store and Google Play, excluding any third-party Android platforms.

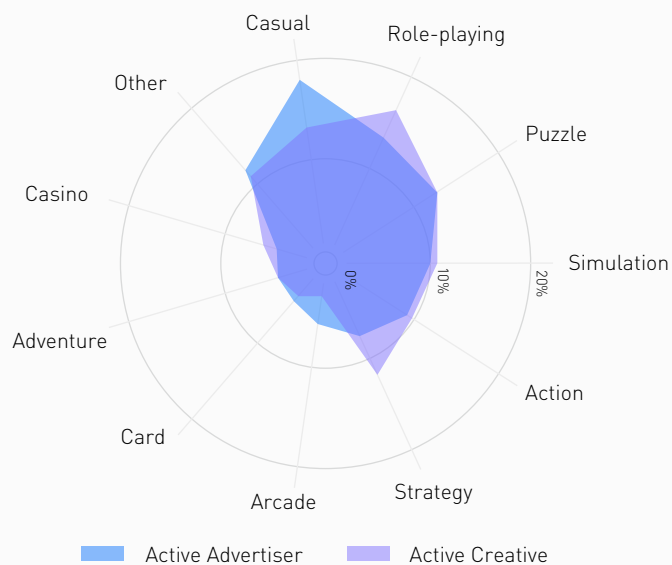
Insights into Advertising of Mobile Games in the Southeast Asia

Creatives for **RPGs** accounting for 16%;

A higher percentage of creatives for **casino games** than that in other Asian-Pacific regions

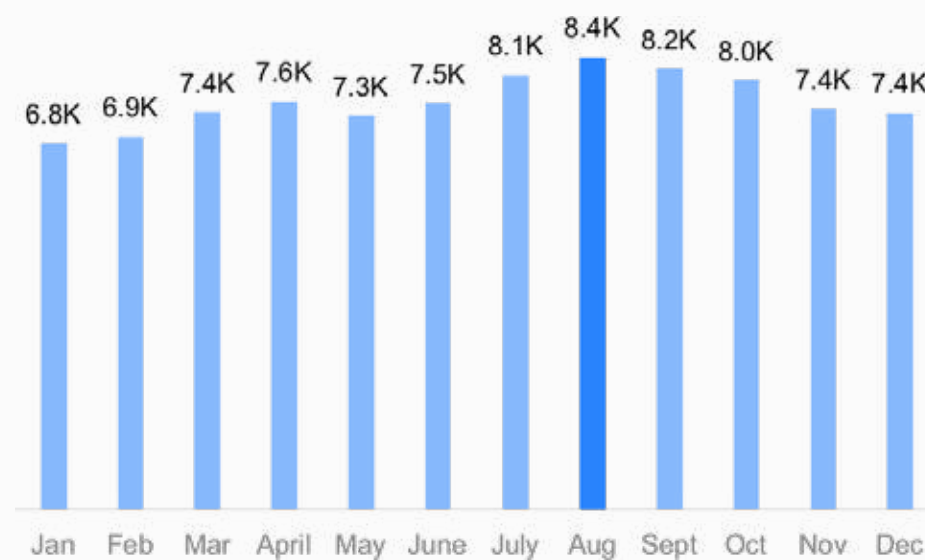
Share of advertising by game type

Casual games had the most advertisers, accounting for 18%; while RPGs had the most creatives, accounting for over 16%.



Number of advertisers each month

The total number of advertisers in 2021 was 17.1K, with 7.6K monthly advertisers. Number of advertisers peaked in August.



Top 10 Mobile Games in the Southeast Asia



Advertising TOP10	
1	Jackpot World™
2	Gaple
3	Lotsa Slots
4	Rise of Kingdoms
5	Mafia City
6	Idle Arks
7	Kiss of War
8	Sniper 3D
9	Perfect World VNG
10	One Punch Man

Downloads TOP10	
1	Garena Free Fire
2	Subway Surfers
3	Mobile Legends
4	Garena Liên Quân Mobile
5	Roblox
6	8 Ball Pool™
7	PUBG MOBILE
8	Play Together
9	Project Makeover
10	Candy Crush Saga

Revenue TOP10	
1	Genshin Impact
2	Garena Free Fire
3	PUBG MOBILE
4	Rise of Kingdoms
5	Roblox
6	Coin Master
7	Mobile Legends: Bang Bang
8	eFootball PES 2021
9	Garena RoV
10	決勝時刻: Mobile

Downloads TOP10	
1	Mobile Legends
2	Worms Zone .io
3	Higgs Domino Island
4	Garena Free Fire
5	Stickman Party
6	Roblox
7	Subway Surfers
8	SAKURA School Simulator
9	Smash Colors 3D
10	Magic Tiles 3

Revenue TOP10	
1	Garena Free Fire
2	Genshin Impact
3	Mobile Legends
4	Coin Master
5	Roblox
6	PUBG MOBILE
7	Rise of Kingdoms
8	Ragnarok X: Next Generation
9	State of Survival
10	eFootball PES 2021

Source: SocialPeta, based on data retrieved from backend data sources

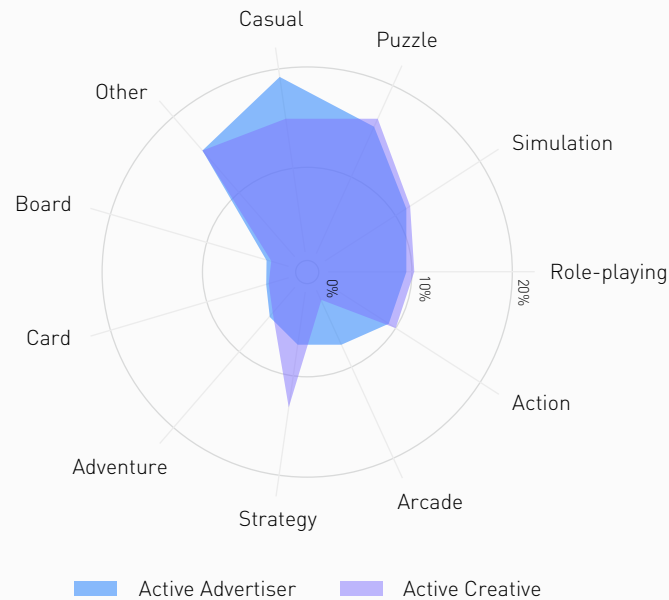
Date: Jan-Dec 2021. The downloads and revenue were generated on the App Store and Google Play, excluding any third-party Android platforms.

Insights into Advertising of Mobile Games in the Middle East

Top products mostly contained the **element of fight**; Creatives for **strategy games** were outstanding

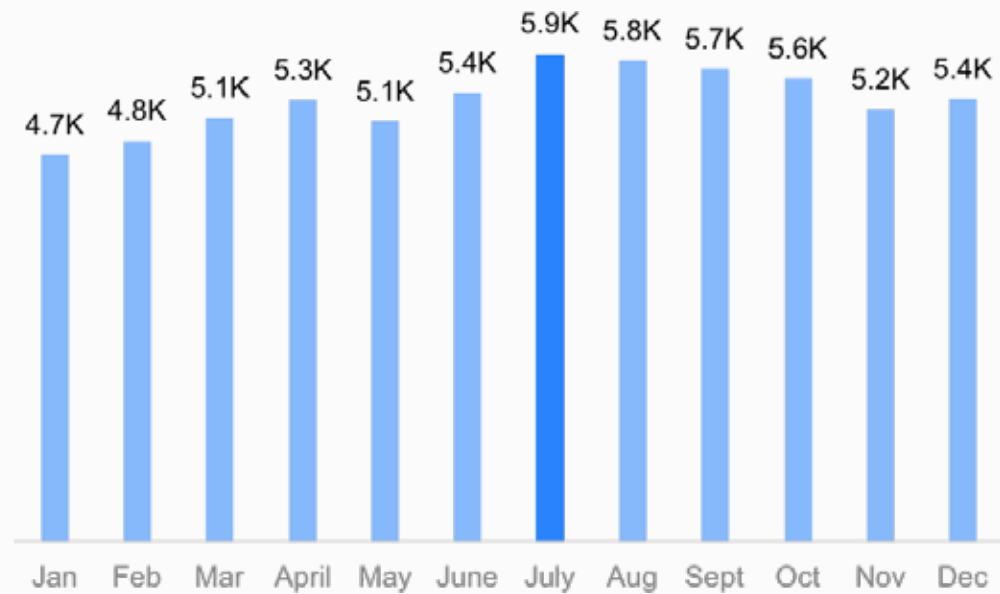
Share of advertising by game type

Top 3 types of games by number of advertisers were casual, puzzle, and simulation. Strategy games had a noticeable number of creatives, accounting for nearly 12%.



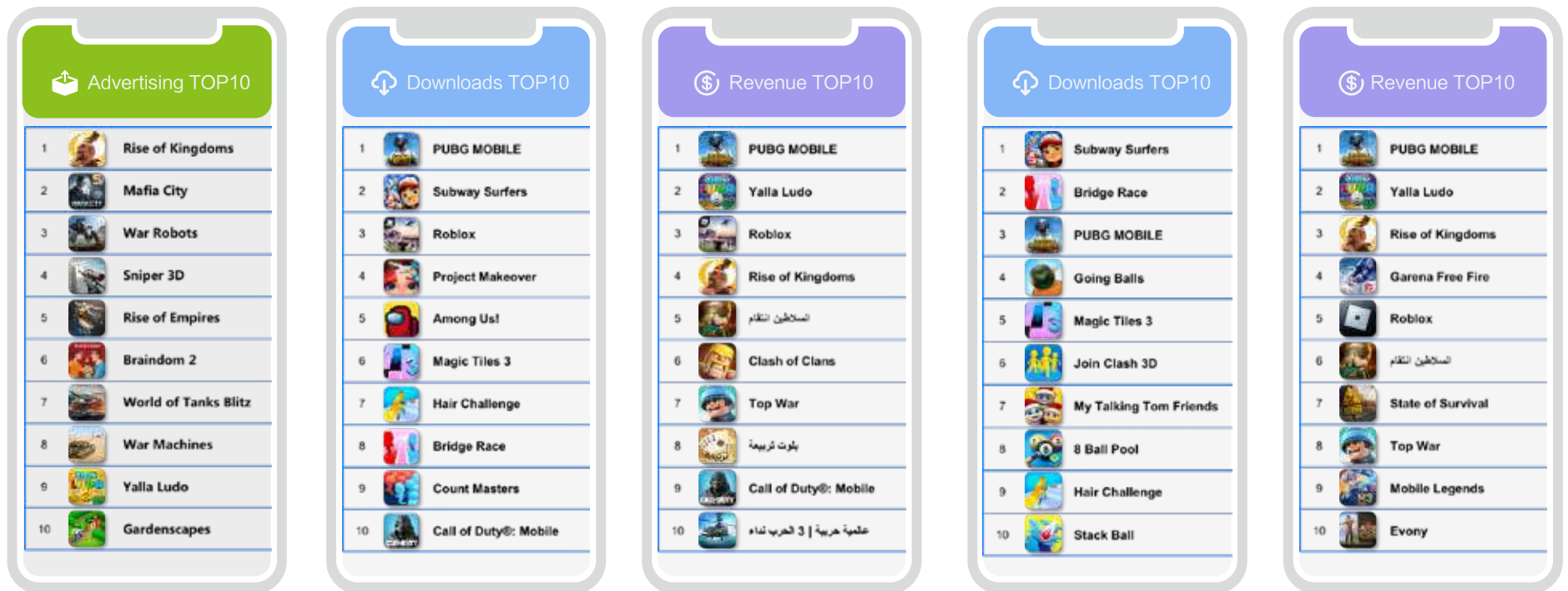
Number of advertisers each month

The total number of advertisers in 2021 was 11.7K, with 5.3K monthly advertisers. Advertisers for each month in H2 2021 remained stable.



Source: SocialPeta, based on data retrieved from backend data sources
Date: Jan-Dec 2021.

Top 10 Mobile Games in the Middle East



Source: SocialPeta, based on data retrieved from backend data sources

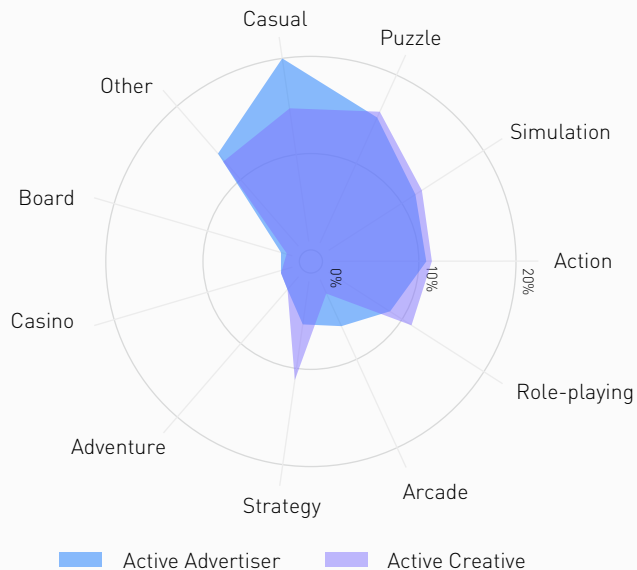
Date: Jan-Dec 2021. The downloads and revenue were generated on the App Store and Google Play, excluding any third-party Android platforms.

Insights into Advertising of Mobile Games in the CIS

Casual game advertisers had an absolute advantage in numbers.
 Players preferred shooter games.

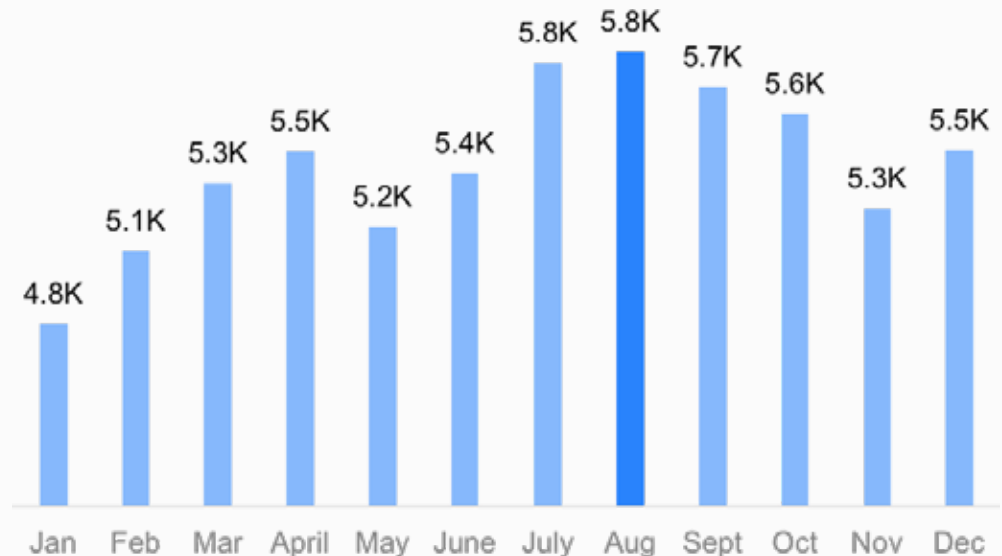
Share of advertising by game type

Casual games had over 3K advertisers, accounting for nearly one-fifth. Strategy and role-playing games contributed a great number of creatives in the CIS.



Number of advertisers each month

The total number of advertisers in 2021 was 12.1K, with 5.4K monthly advertisers.



Top 10 Mobile Games in the CIS



Advertising TOP10	
1	Rise of Kingdoms
2	War Robots
3	Mafia City
4	Idle Arks
5	Sniper 3D
6	The Grand Mafia
7	Ode To Heroes
8	Tennis Clash
9	Fishdom
10	Homescapes

Downloads TOP10	
1	Brawl Stars
2	Subway Surfers
3	PUBG MOBILE: ARCADE
4	Durak Online card game
5	PUBG: NEW STATE
6	Homescapes
7	Water Sort Puzzle
8	Geometry Dash Lite
9	Genshin Impact
10	Count Masters

Revenue TOP10	
1	Homescapes
2	Brawl Stars
3	PUBG MOBILE
4	Genshin Impact
5	Hero Wars
6	Gardenscapes
7	Roblox
8	World of Tanks Blitz
9	Empires & Puzzles
10	State of Survival: The Joker

Downloads TOP10	
1	DOP 2
2	Going Balls
3	Brawl Stars
4	Phone Case DIY
5	Among Us
6	PUBG: NEW STATE
7	Word Pizza - Word Games
8	Standoff 2
9	Geometry Dash Lite
10	Roblox

Revenue TOP10	
1	Hero Wars
2	Standoff 2
3	World of Tanks Blitz
4	PUBG MOBILE
5	Empires & Puzzles
6	Homescapes
7	Brawl Stars
8	State of Survival
9	Gardenscapes
10	RAID

Source: SocialPeta, based on data retrieved from backend data sources

Date: Jan-Dec 2021. The downloads and revenue were generated on the App Store and Google Play, excluding any third-party Android platforms.



Trend of Ad Creatives for Mobile Games Worldwide

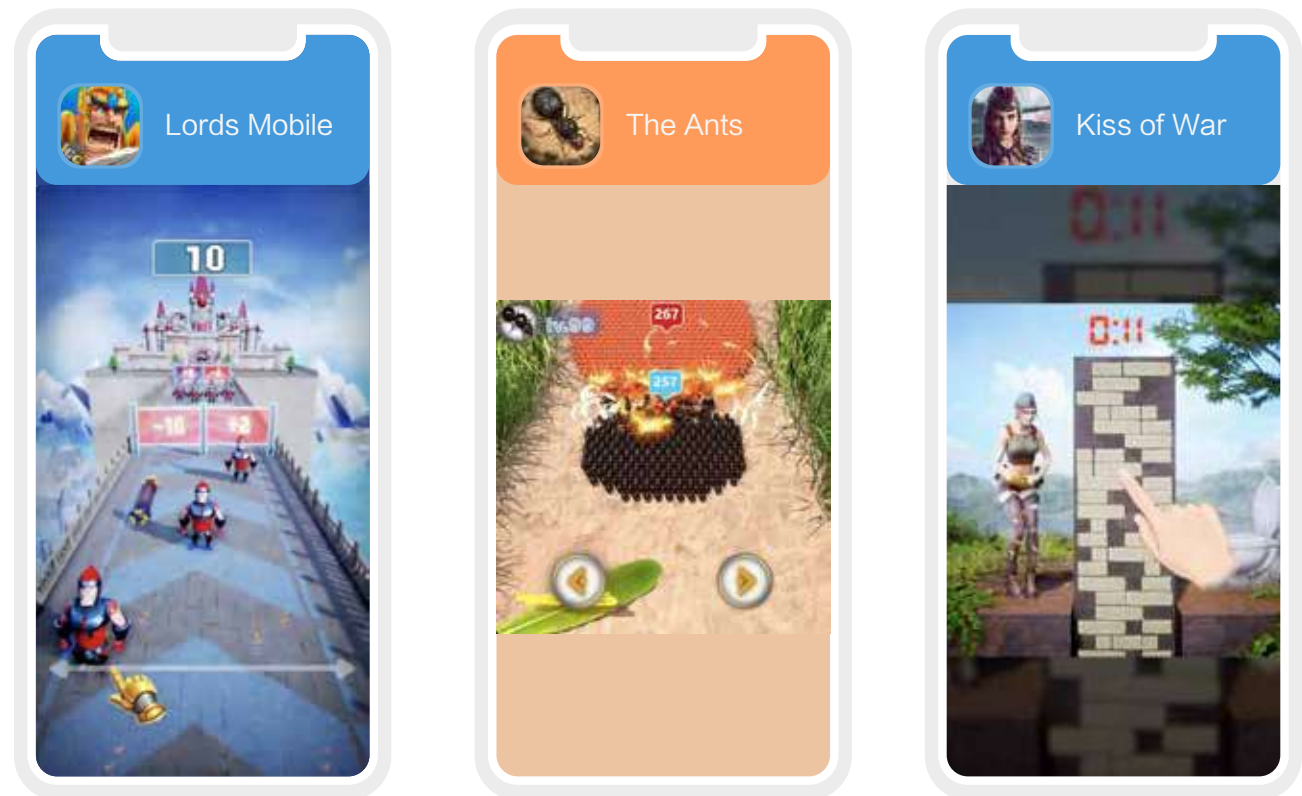
Creatives for Heavy SLGs Start to be Light

SLGs are in long-cycle operation, so continuous advertising is very important for SLGs.

However, advertising cost for hard-core games has been rising higher and higher and is now very close to games' profit.

Under such a general background, many SLG companies sought to acquire casual game players by adding casual, puzzle or other light elements in the creatives.

Though the overall retention rate of casual game players is low, game companies still want to try it because of the relatively low cost and large scale of casual users.



More and More SLG Advertisers Start to Try Real People Creatives

According to the mobile game creatives retrieved from SocialPeta backend data sources, more and more SLGs had real people creatives. SLGs used to focus on UE4 creatives, but Lilith Games spent a lot on real-people trailers for Warpath upon its release in March this year, which marked the beginning of real-people ads for SLGs.

Compared to the UE4 storylines in the past, it's hard for real-people creatives to deliver those wild imaginations, but it will be more convincing with real people on camera and it will enhance the social performance of SLGs.



Rise of Kingdoms



State of Survival



The Lord of the Rings



“Celebrities” Help Boost the Popularity of Mobile Games

Compared to acquiring users through original creatives, it’s more efficient to do that by working with celebrities. The celebrities in the following ads all have lots of royal fans and hence they have great influence. Moreover, each of them is of a quality fit for the product tonality. As a result, it’s easier to get people to download and play the game.



The famous football star, Cristiano Ronaldo endorsed Free Fire



South Korean movie star Kwon Sang-woo with Mobile Legends released in South Korea



State of Survival with Daryl Dixon (portrayed by Norman Reedus) from AMC's The Walking Dead

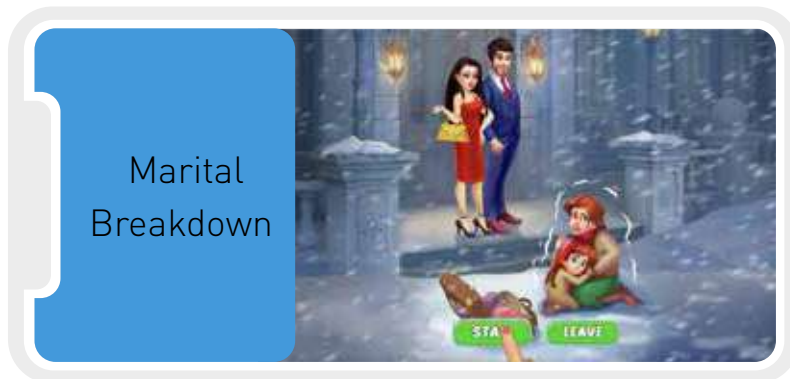


Mariah Carey with Family Island™ for Christmas

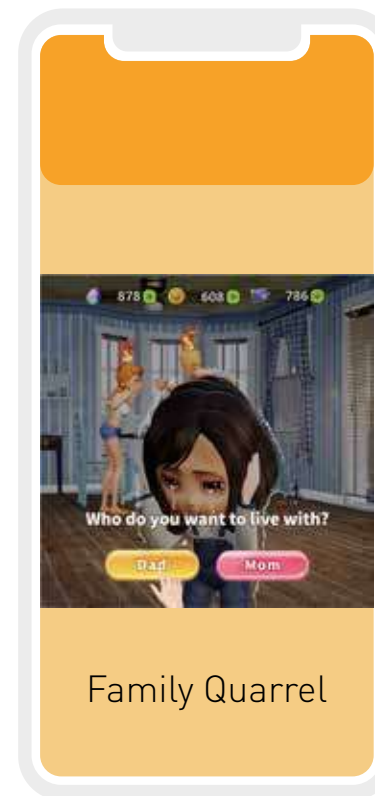


Advertising of Medium Casual Games Values Female Perspectives

Match-3 + X games and business simulation games are medium games played mainly by females. Therefore, creatives for those games mostly tell stories from female perspectives about awful things female players may encounter in real life, for example, a broken family, a broken heart, childcare, makeups, and so on. The creatives tell how miserable the heroines' lives are to make players feel sorry for them and want to download the game and change their lives.



Homescapes



Family Quarrel



Family Farm Adventure



School Bullying



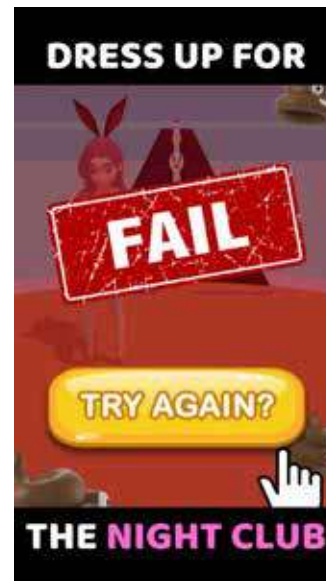
Project Makeover

Traditional “Gameplay” is no Longer Dull Thanks to Multiple Elements

Gameplay is the [core of creatives](#)



+Comparison



+Bad ending



+Short Video



+Real People Playing
&Other fun elements



Industry Insights

Media, platforms, consulting companies,
and game companies



Going global will be a key strategy for top enterprises in 2022

1. Macro Trends in the Gaming Industry

Chinese mobile gaming market was still on the rise in 2021, but at a much lower rate compared to last year with the demand driven by stay-at-home economy being fully unleashed. Meanwhile, with the government's constant attention on gaming industry and the introduction of various policies to guarantee the healthy and smooth development of the industry, the Chinese mobile gaming market has started to focus on refinement and globalization of games. As predicted by IResearch, the Chinese mobile gaming market will see a steady

growth in the following 2 years, transitioning from a market seeking innovation and high speed to a market seeking high quality and stabilization.

Going global will be a key strategy for game enterprises, especially top game enterprises, in 2022. Our prediction shows that the overseas markets will require games to be more refined in the future than in the previous 2 years. The operating modules in general will transition from modules of language areas, to modules of continents, and further to modules of different countries. In the future, games will be seeking to

distinguish themselves in advertising, marketing, and other specific things about the game's release. The Middle East market will be important for games seeking to go global. Middle East has great potential due to its high penetration of Internet and rapidly growing game industry.

2. Micro Trends in the Gaming Industry

From the micro level, the two hot topics in the Chinese gaming industry in 2021 were "metaverse" and "game investment", both implying that industry participants sought to diversify their income and wished to break the ice in the industry. With the possibility of a quick technological breakthrough, VR/AR games that originate from cloud gaming and metaverse will receive more attention from investors till they are finalized. With the increasing interest of players in games, some traditional mobile games will reposition themselves. For example, card RPGs will gradually have a mixed gameplay. The once-minority genres of games, including board wargaming SLGs, online co-op games, and anime-style PVE shooters, will gradually expose to the public and receive a number of core users.



MOONTON

Advertising Industry Forecast for 2022

2021 witnessed major changes in the advertising industry. The release of iOS14.5 drove many advertisers out of personalized advertising of iOS system ads, placing all advertisers on the same starting line to replan advertising on iOS. But based on the updates of advertising systems on various top platforms, advertising platforms in the future will value users' privacy more, data optimization systems will involve more black-box testing and rely more on AI learning models for optimization. Therefore, how to reach target users effectively will be a major question to be discussed during the exploration of the media buying industry.

Google's currently major products AC1.0, AC2.0, AC2.5, AC3.0, and Facebook's Automated App Ads (AAA) all forced advertisers to change their advertising strategies from focusing on personalization to creativity. So, it's believed that advertisers will be competing in their creative ads for a long time to come.

How to connect products with ad creatives? How to tell stories of creative ads in way to attract more users and cater to their taste? Those are the key questions to solve before winning the competition of creative ads. We'll also research how to know more about target users' preferences and tell stories of ads to get users interested.



1. Cryptocurrency & NFTs

Non-fungible tokens (NFTs) will grow bigger in gaming, becoming a mainstream alternative to centralized and custodial ownership of virtual assets. This is already providing opportunities for players, creators and developers within gaming the ability to monetize and collaborate in new exciting and decentralized ways.

2. Monetization

“We expect more studios to lean toward broad market casual – to shift from hyper-casual to longer life cycle games with higher monetization potential. We also expect to see more games doing both ad and IAP monetization.

—Idil Canal, General Manager of Business Solutions, AppLovin

3. UA/Performance

2022 will see mobile developers investing more into alternative mobile payment methods. Discounts will be provided to incentivize users to create accounts for this separate payment flow.

—Jerome Turnbull, Vice President of Growth, AppLovin

4. App and Creator Economies are Gold Mines for Marketers

Marketers' toolboxes have been forever changed and expanded as we emerge from the pandemic and live in a vibrant creator economy world. Consumer behaviors, particularly their use of apps on mobile devices to conveniently conduct and enjoy all aspects of life, coupled with the proliferation of content creation platforms, are creating greater opportunities for marketers to more easily monetize and market to defined, engaged audiences.

—Katie Jansen, AppLovin Chief Marketing Officer

5. Global M&A Activity Is Surpassing All Expectations

M&A is going to continue to be robust, maybe outstripping the enormous volume in 2021 due to: DEMAND - companies need to continue to transform themselves to remain relevant and competitive given the rapid change and global competition, driven primarily by technology.

SUPPLY - more and more companies are being formed given the lower cost to start a business and access to widening pools of VC/and related capital, as well as access to the IPO/SPAC markets.

6. Business Impact from Covid-19

While the pandemic impacted and slowed down many companies, we have seen some businesses grow very quickly despite the circumstances. Fundamentally, companies now on the other side of the pandemic are doing very well and growing at a very high rate, and valuations reflect that.



The mobile advertising industry has been evolving quickly in the past year, for 2022, Chartboost predict:

1. User privacy is more important than ever. Apple and Google are releasing privacy protection policies that give advertisers challenges on user acquisition without IDFA. Chartboost and other networks are developing privacy safe solutions to keep delivering good performance to our clients. We recommend advertisers to start as early as possible with the SKAN User acquisition test when we still have the benefits of using probabilistic matching in parallel because it will keep us ahead of the game when we lose that

ability. We also predict that with SKAN limitations, advertisers will focus more on ad creative design and optimization.

2. Hybrid model monetization is a trend. Developers are not satisfied with the waterfall solution only and are integrating as many bidding partners as possible for higher ad revenue. Chartboost offers Helium as a hybrid model monetization solution that supports both bidding and non-bidding networks and delivers the highest ad revenue and efficiency to developers.

3. Developers are exploring innovative IAP mechanics and social features to increase user engagement and retention. For gaming developers, Limited time IAP-offers, Piggy bank and battle pass are good choices and worth trying. Developers are expanding their social features like in-game chat, PvP modes and guilds.

Report Specification

1. Copyright

This white paper is produced by SocialPeta's Ad Intelligence team. All the text, pictures, and tables in the report are protected by trademark and copyright laws. Some of the text and data are collected from public information and owned by original authors. Without the written permission of relevant companies, any organization or individual shall not reproduce or transmit this report in any form. Any unauthorized.

business use of the report is deemed a violation of copyright and other laws and regulations as well as relevant international conventions.

2. Exemption

The industry data and related market forecasts in the white paper are obtained through desktop research, industry interviews, market surveys and other research methods by internal researchers in combination with SocialPeta product data estimates, and are used for industry reference only.

The survey data released in the report are obtained through sample surveys, with the data results subject to the samples. Given the limitations of survey methods and samples and the limited scope of survey data collection, the data only represents the basic situation of when the surveys occurred and who the surveys targeted, and only serves the purpose of the surveys at the time to provide a basic reference point for markets and users.

Given the limited research methods and data acquisition resources, the report is only available to users as market reference data. SocialPeta do not assume legal responsibility for the data and views contained in the report.

About SocialPeta

With **SocialPeta**, you can gain insight into your competitors' advertising data. You will be informed of and inspired by advertising data of different dimensions from global networks, media and advertisers.

Get inspiration from 1B ad creatives.

We cover 80+ global ad networks across 70 countries and regions, including Unity, Twitter, YouTube, Facebook and Tik Tok. We have accumulated 1B ad creatives, updating 1.2 M+ ad creatives on a daily basis. SocialPeta will be a great help when you run out of inspiration for ad creatives.

Contact



Web: www.socialpeta.com



Email: summer@socialpeta.com

SocialPeta Global Partners



#1 Advertising Intelligence Platform

