

Q2 2023

Insights into Marketing Trends
of Global **Mobile Games**

MOBILE GAMES
MARKETING



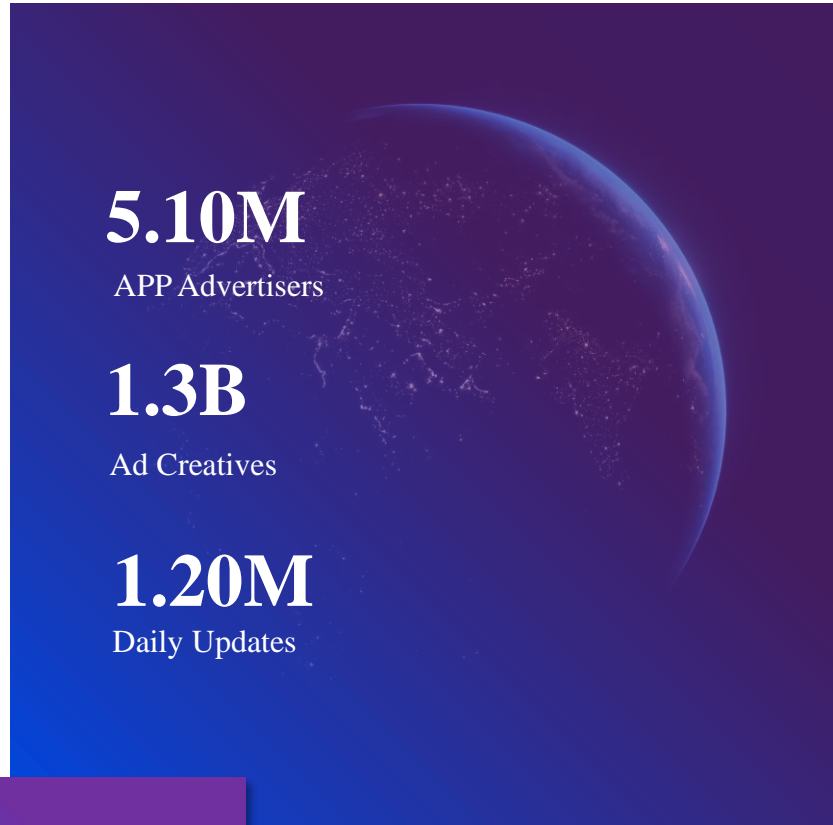


SocialPeta

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 nearly 70 countries/regions and over 70 well-known ad channels worldwide, such as Facebook, Twitter, YouTube, TikTok, and Unity. We provide nearly 1.3 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.

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Insights into Advertising of Global Mobile Games

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01

Trends in Global Mobile Game Marketing

TRENDS IN MOBILE GAME MARKETING



Insights into Global Mobile Game Marketing

Q2 saw an increasing number of advertisers with new creatives, which accounted for over 74% of creatives

- In Q2 2023, advertisers with new creatives **had been increasing to reach over 51,000**, accounting for **90.26%**, down 1.96% QoQ.
- In Q2 2023, new creatives surpassed 9.30 million, and **the percentage of new creatives also reached a record high of 74.27%**.



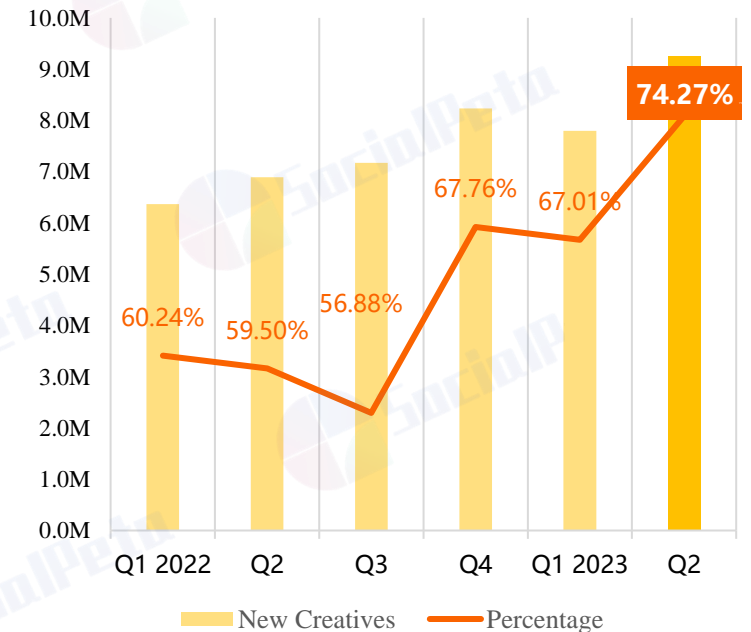
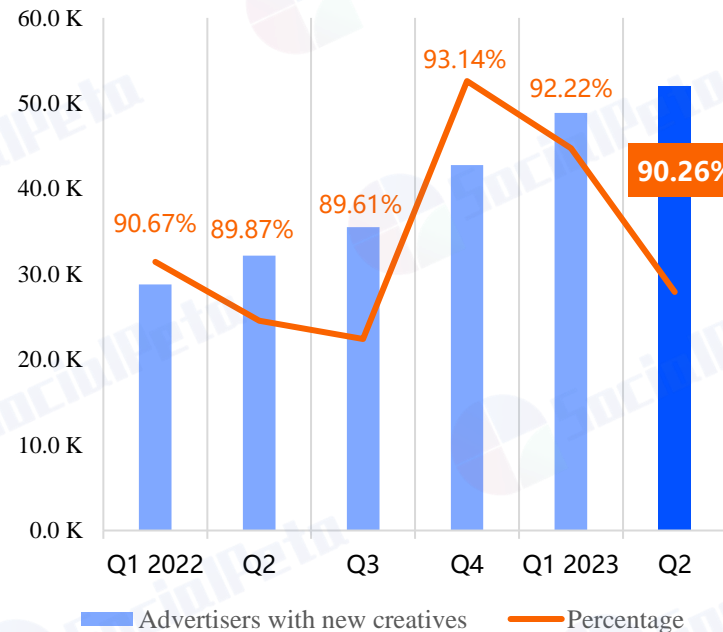
Advertisers with new creatives in Q2 2023

51.9K 90.26%



New creatives in Q2 2023

9.3M 74.27%





Insights into Mobile Game Marketing in Different Regions

Southeast Asia ranked No.3 in terms of monthly advertisers.

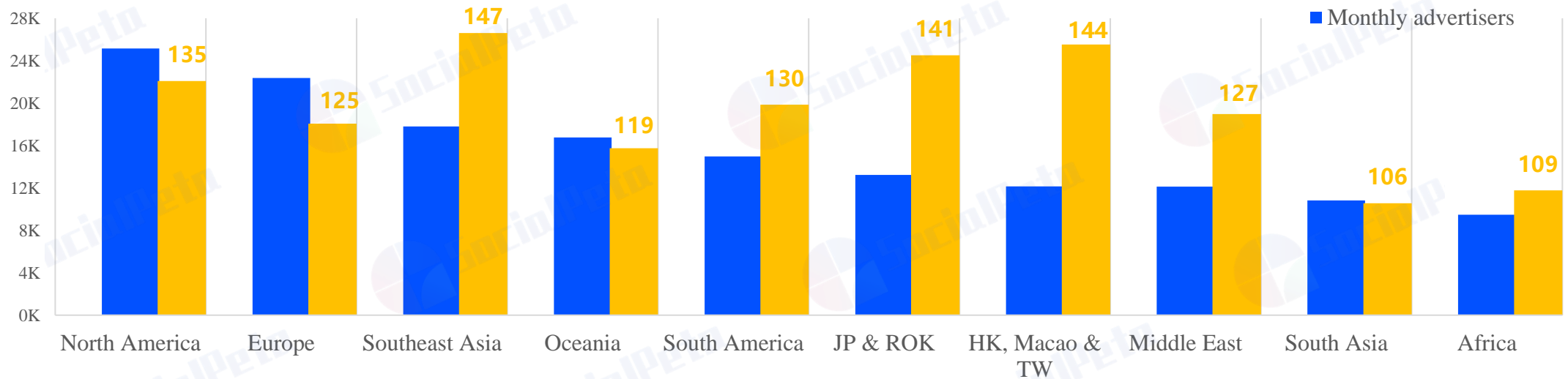
Southeast Asia recorded 147 monthly creatives, surpassing China's HK, Macao & TW to top the chart.

Monthly advertisers in Southeast Asia: 17.8K

Southeast Asia surpassed Oceania in terms of monthly advertisers in Q2 to rank No.3. North America continued to report the highest monthly advertisers.

Monthly creatives in Southeast Asia: 147

Southeast Asia recorded 147 monthly creatives per advertiser in Q2, surpassing China's HK, Macao & TW to top the chart. Southeast Asia, China's HK, Macao & TW, and JP & ROK all had over 140 monthly creatives.



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



Percentage of Creatives by Game Genre in Q2 2023

Casino game advertisers reported the greatest QoQ increase in percentage of creatives. RPG game creatives accounted for 9.78%, up 3.41% compared to Q1

Genre	% of Advertisers	QoQ	YoY
Casual	30.46%	1.30%	2.65%
Puzzle	11.74%	-0.33%	-0.29%
SIM	9.28%	-0.27%	-0.40%
Action	7.53%	-0.43%	-0.64%
Casino	7.05%	1.83%	2.82%
RPG	5.82%	-0.22%	-1.22%
Arcade	4.91%	0.25%	-0.66%
Card	4.49%	0.25%	0.12%
SLG	4.15%	-0.35%	-0.50%
Adventure	3.56%	-0.61%	-0.67%

Genre	% of Creatives	QoQ	YoY
Casual	33.14%	0.46%	13.33%
Puzzle	10.96%	-1.16%	-2.47%
RPG	9.78%	3.41%	-1.83%
Casino	7.27%	1.28%	1.68%
SLG	6.73%	2.43%	-3.45%
SIM	6.64%	-2.37%	-2.19%
Card	5.36%	2.15%	0.20%
Action	5.24%	-3.33%	-1.91%
Arcade	3.40%	-1.90%	1.38%
Adventure	2.77%	-0.36%	-1.96%



Insights into Advertising of Mobile Games on iOS & Android

A small surge in creatives on Android, Q2 saw over 73% of advertisers

Mobile game advertisers on iOS & Android in Q2 2023

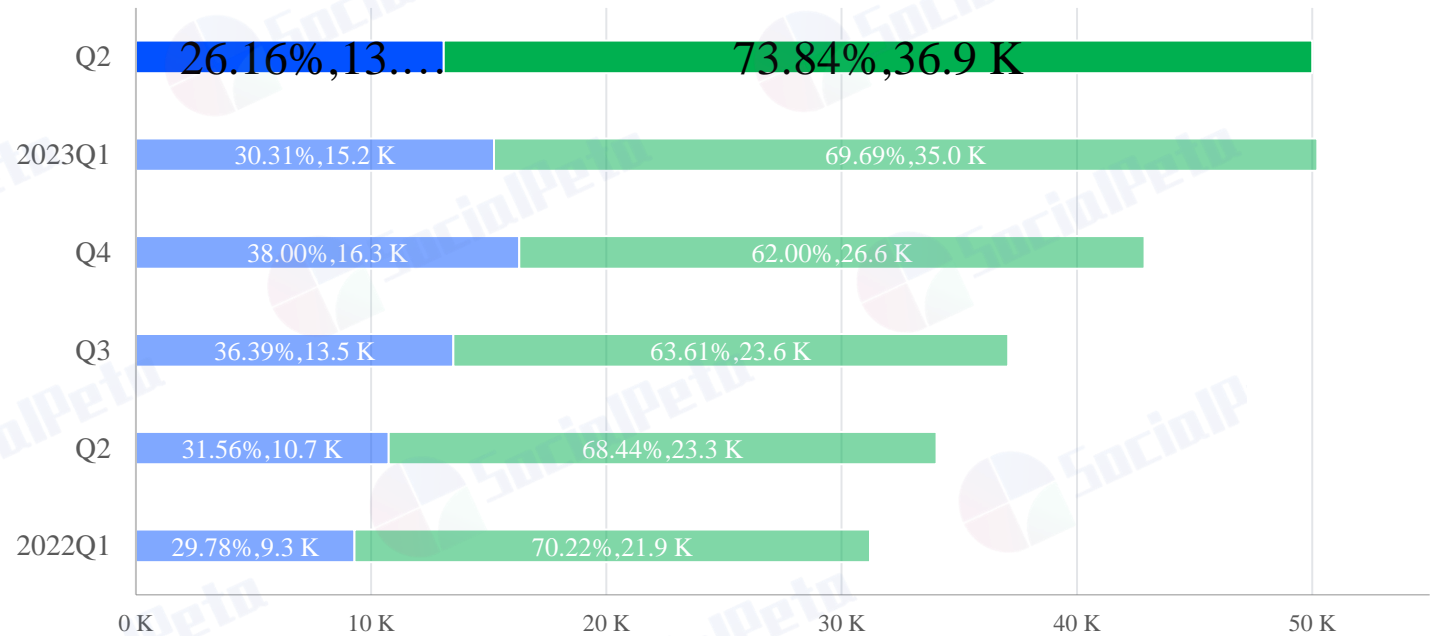
Average creatives on Android were 100 more than on iOS. Q2 reported 13.1K advertisers on iOS, a sharp decline of 13.8% QoQ.



166 QoQ: **10.3%**↓
Average creatives on iOS in Q2 2023

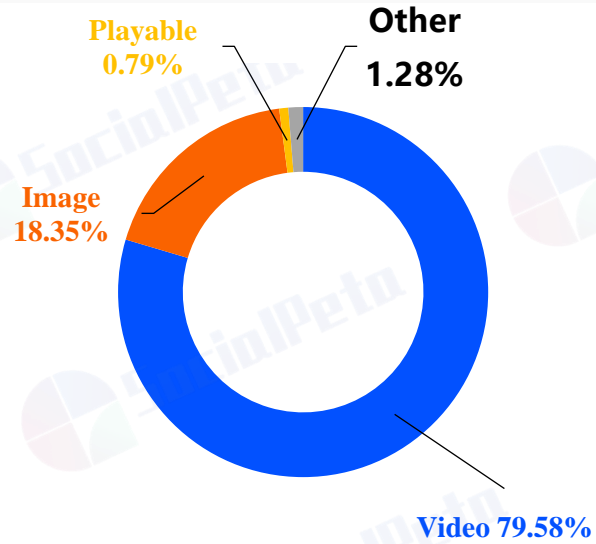


266 QoQ: **8.5%**↑
Average creatives on Android in Q2 2023





Percentage of game ad creatives by type



Q2 2023
Percentage of
ad creatives by type

121.1K

QoQ: 24.8% ↑

Q2 2023
Estimated impressions
per creative

Impressions per creative on iOS: 181.7K

Impressions per creative on Android:

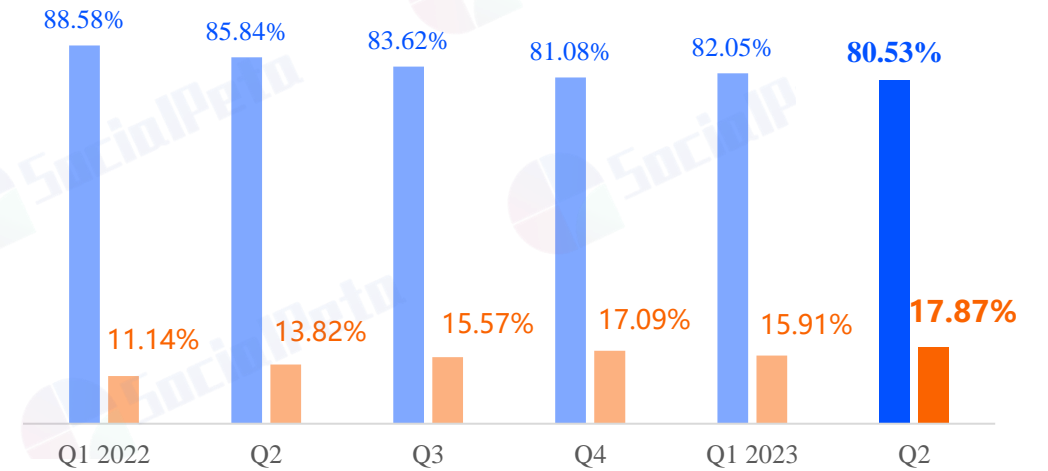
102.4K

Genre with the highest impressions per
creative: Action

Percentages of impressions of video and image creatives

Video creatives continued to record a decline in impressions, accounting for less than 81%

Impressions of image creatives accounted for over 17.5%, a record high





02

Q2 2023 Top Charts of Global Mobile Games

2023 Q2 MOBILE GAME TOP LIST



Games by Advertising on iOS | TOP30

1	鬼武三國 Miao Game	RPG	11	天際傳說 SpringGame	RPG	21	阿呆請出戰 AVGLIFE	Action
2	Block Blast Hungry Studio	Casual	12	Evony Top Games	SLG	22	X-HERO Bingchuan Network	RPG
3	1945 OneSoft	Arcade	13	大仙尊：修仙問情 Fun Pony Game	RPG	23	Royal Match Dream Games	Puzzle
4	Call of Dragons Lilith Games	SLG	14	Ragnarok Origin Global Gravity Corporation	RPG	24	Kung Fu Saga 4399	RPG
5	永恆島LaTale Lulin Games	Adventure	15	Revelation VNG Games	RPG	25	Jackpot World™ Bole Games	Casino
6	神蹟：血舞者 Eskyfun	RPG	16	Play Rummy Passion Cash Games Passion Gaming Private Limited	Casino	26	アルケランド Zlongame	RPG
7	Vampire Hunter jjgames	RPG	17	戀戀清庭 Ludoo Games	SIM	27	MONOPOLY GO! Scopely	Party
8	Big Cash Witzeal Technologies	Casino	18	Block Puzzle Doodle Mobile	Puzzle	28	Word Search Pandas of Caribbean	Puzzle
9	超能世界 Bingchuan Network	RPG	19	The Ants StarUnion	SLG	29	Two Dots Playdots	Casual
10	暮色雙城 SpringGame	RPG	20	Honkai: Star Rail miHoYo	RPG	30	Viking Rise IGG	SLG



Top Mobile Games on the App Store

Download Chart































Revenue Chart

1		Honkai: Star Rail	RPG	11		Candy Crush Saga	Puzzle	1		Candy Crush Saga	Puzzle	11		Clash of Clans	SLG
		miHoYo				King				King				Supercell	
2		MONOPOLY GO!	Board	12		Impossible Date	Puzzle	2		Roblox	Adventure	12		PUBG MOBILE	Action
		Scopely				Matchingam Games				Roblox				Tencent	
3		Roblox	Adventure	13		Free Fire	Action	3		Royal Match	Puzzle	13		パズル&ドラゴンズ	RPG
		Roblox				Garena				Dream Games				GungHo Online Entertainment	
4		Royal Match	Puzzle	14		Parking Jam 3D	Casual	4		Honkai: Star Rail	RPG	14		Township	SIM
		Dream Games				Popcore				miHoYo				Playrix	
5		Subway Surfers	Casual	15		Tomb of the Mask	Casual	5		Gardenscapes	SIM	15		Fishdom	SIM
		Sybo Games				Playgendary				Playrix				Playrix	
6		Gardenscapes	SIM	16		Call of Duty®: Mobile	Action	6		Coin Master	Casual	16		Fate/Grand Order	RPG
		Playrix				Activision				Moon Active				Aniplex	
7		Block Blast Adventure Master	Casual	17		Among Us!	Action	7		モンスターストライク	Action	17		Call of Duty®: Mobile	Action
		Hungry Studio				InnerSloth				XFLAG				Activision	
8		8 Ball Pool™	Sports	18		PUBG MOBILE	Action	8		Homescapes	SIM	18		리니지W	RPG
		Miniclip				Tencent				Playrix				NCSOFT	
9		Bridge Race	Casual	19		FIFA Soccer	Sports	9		Pokémon GO	RPG	19		プロ野球スピリッツ A	Sports
		Supersonic				Electronic Arts				Niantic				KONAMI	
10		Magic Tiles 3	Music	20		Going Balls	Casual	10		Genshin Impact	Adventure	20		Evony	SLG
		Amanotes				Supersonic				miHoYo				Top Games	

Source: SocialPeta - APP Intelligence
 Excluding any data from China's mainland
 Date Range: Apr.-Jun. 2023



Games by Advertising on Android | TOP30

1		Epic Heroes Bingchuan Network	RPG	11		Last Fortress IM30	SLG	21		Zombie Waves Fun Formula	Action
2		Mighty Party Panoramik Games	RPG	12		Call of Dragons Lilith Games	SLG	22		1945 OneSoft	Arcade
3		Ragnarok Origin Global Gravity Corporation	RPG	13		Jackpot World™ Bole Games	Casino	23		Travel Center Tycoon SONOW	SIM
4		Braindom Matchingam Games	Puzzle	14		鬼武三國 Miao Game	RPG	24		Viking Rise IGG	SLG
5		Evony Top Games	SLG	15		Weapon Craft Run Rollic Games	Casual	25		Lords Mobile IGG	SLG
6		The Grand Mafia Yotta Games	SLG	16		Mafia City Yotta Games	SLG	26		Pressure Washing Run Rollic Games	Casual
7		超能世界 Bingchuan Network	RPG	17		Dragonscapes Adventure Century Games	SIM	27		Coin Master Moon Active	Party
8		Block Blast Hungry Studio	Casual	18		Jigsawscapes Pandas of Caribbean	Puzzle	28		Vampire Hunter jjgames	RPG
9		Ludo Flying Chess shivkumar	Board	19		Sky Utopia JunHai Games	RPG	29		神蹟：血舞者 Eskyfun	RPG
10		Yalla Ludo Yalla	Board	20		Super Cube Master Jatin thareja	Puzzle	30		The Wandering Ark Electronic Soul	RPG



Top Mobile Games on Google Play

Download Chart

Revenue Chart

1	Subway Surfers Sybo Games	Casual	11	Going Balls Supersonic	Casual	1	Coin Master Moon Active	Casual	11	리니지W NCSOFT	RPG
2	Ludo King™ Gametion	Board	12	My Talking Tom 2 Outfit7	SIM	2	Candy Crush Saga King	Puzzle	12	Pokémon GO Niantic	RPG
3	Honkai: Star Rail miHoYo	RPG	13	Attack Hole Homa	Casual	3	Roblox Roblox	Adventure	13	Township Playrix	SIM
4	Candy Crush Saga King	Puzzle	14	Temple Run 2 Imangi	Action	4	리니지W NCSOFT	RPG	14	GODDESS OF VICTORY: NIKKE Tencent	RPG
5	Roblox Roblox	Adventure	15	Indian Bikes Driving 3D Rohit Gaming	SIM	5	Royal Match Dream Games	Puzzle	15	Fishdom Playrix	SIM
6	Dream11 Sporta Technologies	Sports	16	Hill Climb Racing Fingersoft	Racing	6	Honkai: Star Rail miHoYo	RPG	16	Evony Top Games	SLG
7	Free Fire Garena	Action	17	Bridge Race Supersonic	Casual	7	Gardenscapes Playrix	SIM	17	Clash of Clans Supercell	SLG
8	Block Blast Adventure Master Hungry Studio	Casual	18	Royal Match Dream Games	Puzzle	8	Genshin Impact miHoYo	Adventure	18	PUBG MOBILE Tencent	Action
9	Race Master 3D SayGames	Racing	19	Car Games 3D Zego Studio	Racing	9	나이트 크로우 WeMade	RPG	19	몬스터스트라이크 XFLAG	Action
10	My Talking Tom Friends Outfit7	SIM	20	Free Fire MAX Garena	Action	10	Homescapes Playrix	SIM	20	아키에이지 워 Kakao	RPG



Global Mobile Game Advertisers

#	Company Name		Deduplicated Creatives	Advertised Products	Mainly Advertised Products	#	Company Name		Deduplicated Creatives	Advertised Products	Mainly Advertised Products
1	Rollic Games		69.3K	113		11	Homa		22.0K	44	
2	Bingchuan Network		38.6K	10		12	Playrix		21.2K	18	
3	Century Games		36.2K	20		13	Panoramik Games		20.6K	2	
4	Voodoo		32.3K	178		14	FunPlus		20.3K	15	
5	Bole Games		32.2K	12		15	Green Panda		19.4K	28	
6	JunHai Games		31.1K	21		16	十方途创		18.4K	11	
7	OneSoft		28.5K	33		17	Azur Interactive Games		17.3K	157	
8	Yotta Games		27.9K	12		18	Zynga		16.8K	35	
9	IGG		27.4K	27		19	Pandas of Caribbean		15.9K	11	
10	Guru Puzzle Game		26.3K	21		20	Easybrain		14.9K	41	

Source: SocialPeta - Company Analysis:
 Companies are sorted by their products' deduplicated creatives from high to low.
 Date Range: Apr.-Jun. 2023



03

Marketing Trends in Top Regions & Game Genres

POPULAR MOBILE GAME TYPES & REGIONS MARKETING INSIGHTS



Top Game Markets

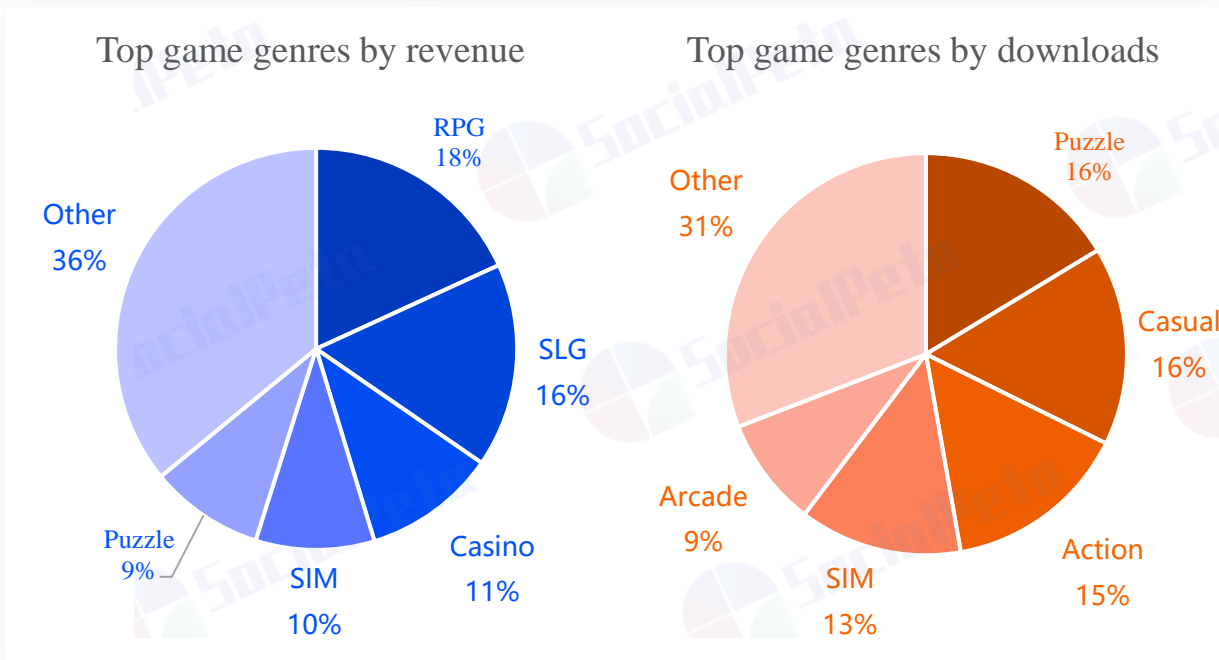
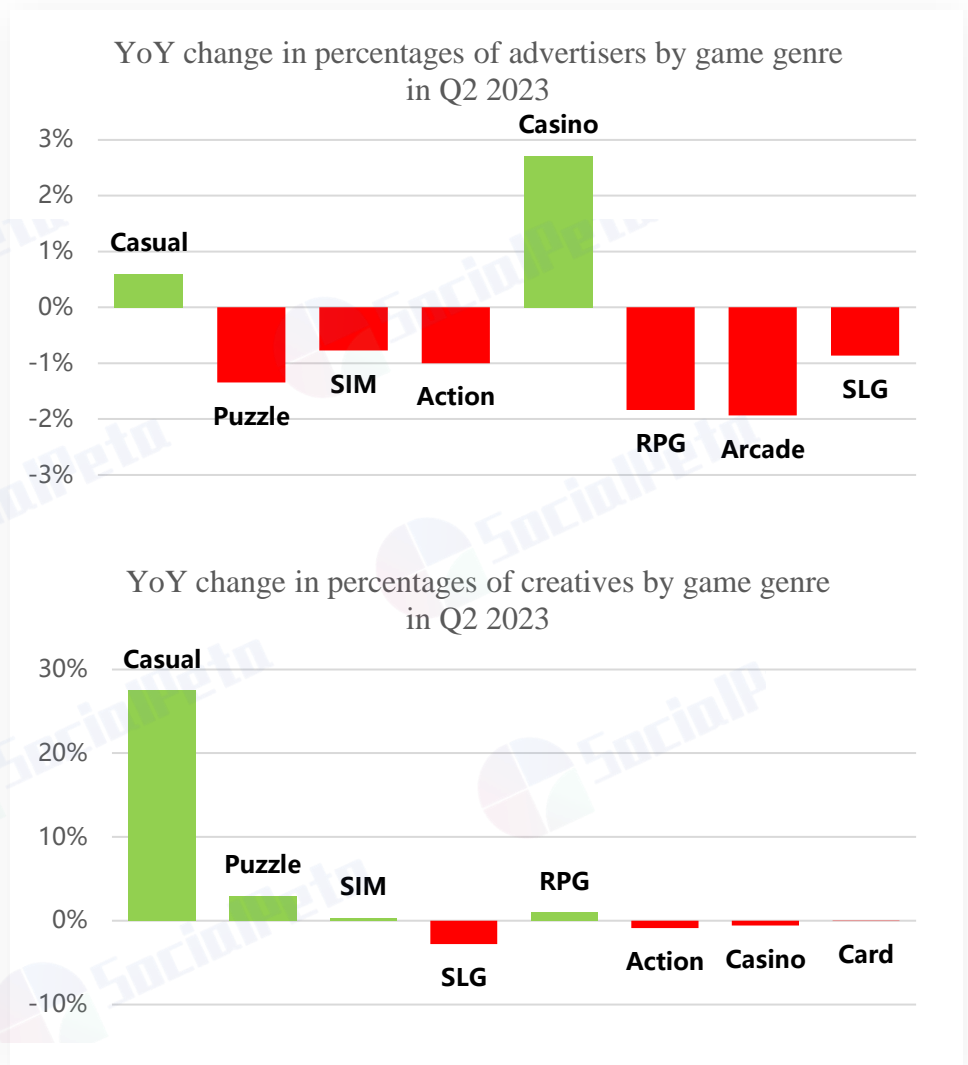
USA, JAPAN, SOUTH KOREA, CHINA'S HK, MACAO & TW,
SOUTHEAST ASIA, MIDDLE EAST



USA: highest revenue from RPGs, greatest growth in Casino game advertisers

RPGs and SLGs were outstanding in terms of revenue. However, due to the difficulty for small companies to access technologies and IPs, the percentages of both advertisers and ad creatives dropped sharply.

With new competitors came in, casino and casual games adopted more aggressive marketing strategies as compared to mid-core and hard-core games.



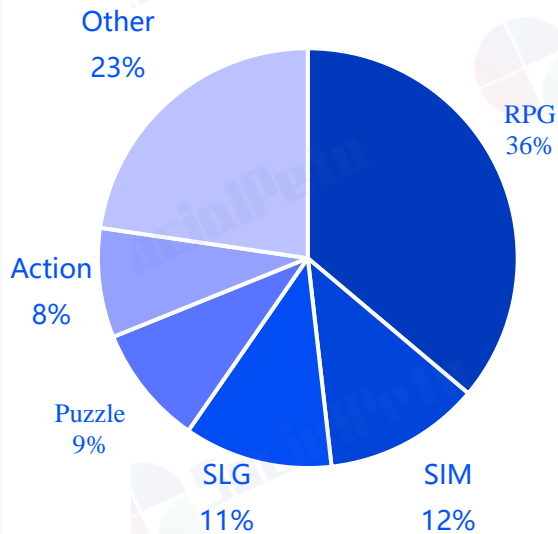


Japan: ACG RPGs were leading in revenue growth

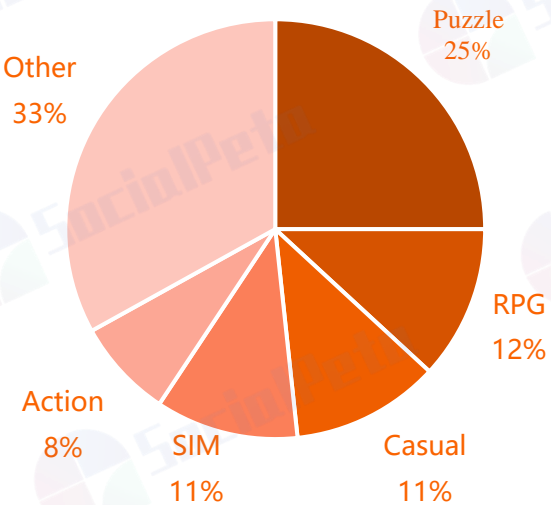
Japan's RPG genre revenue accounted for as much as 38%, ranking second in the world. Among them, card RPG contributed the most, and SIM genre performed well in terms of revenue and downloads.

Japan's puzzle-solving genre accounted for 25% of downloads, ranking first in the world, among which brain teaser games made a prominent contribution, and the average material consumption of advertisers in this genre showed a year-on-year upward trend.

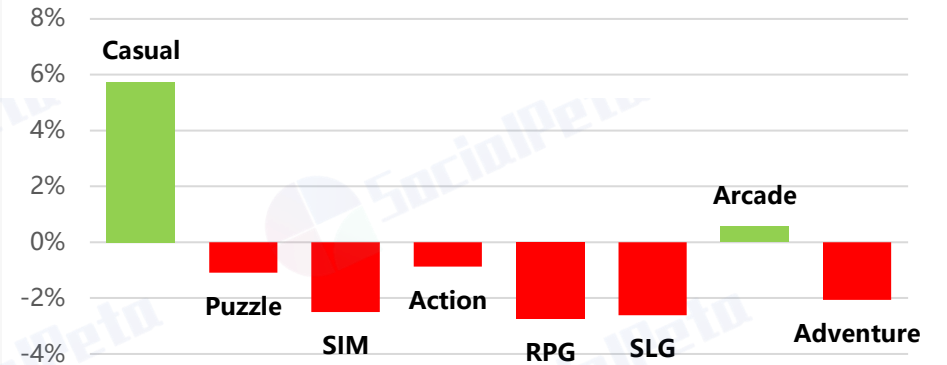
Top game genres by revenue



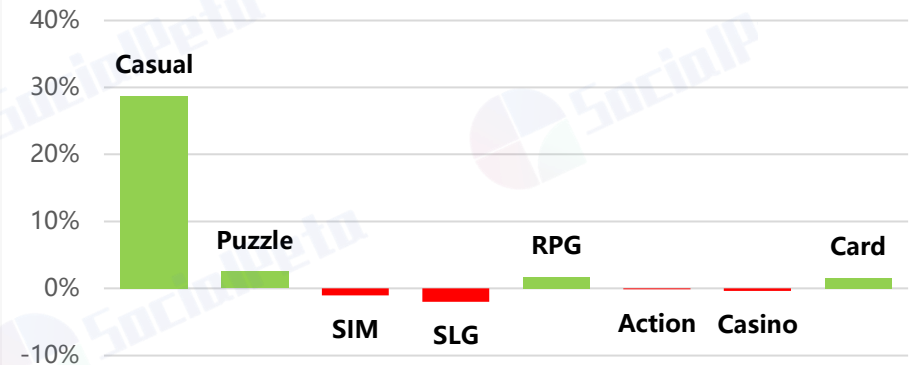
Top game genres by downloads



YoY change in percentages of advertisers by game genre in Q2 2023



YoY change in percentages of creatives by game genre in Q2 2023



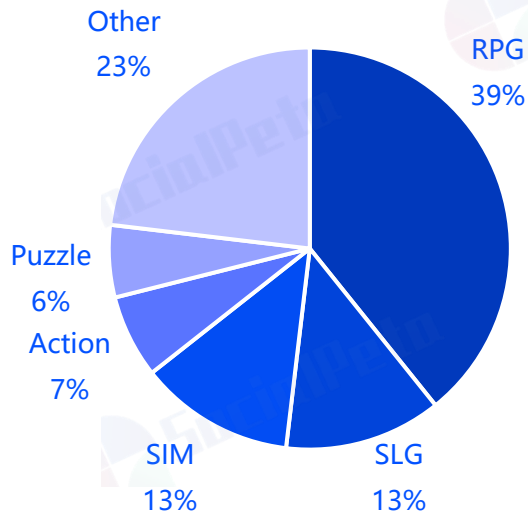


South Korea: MMO remained a stable market share and arcade games competed fiercely

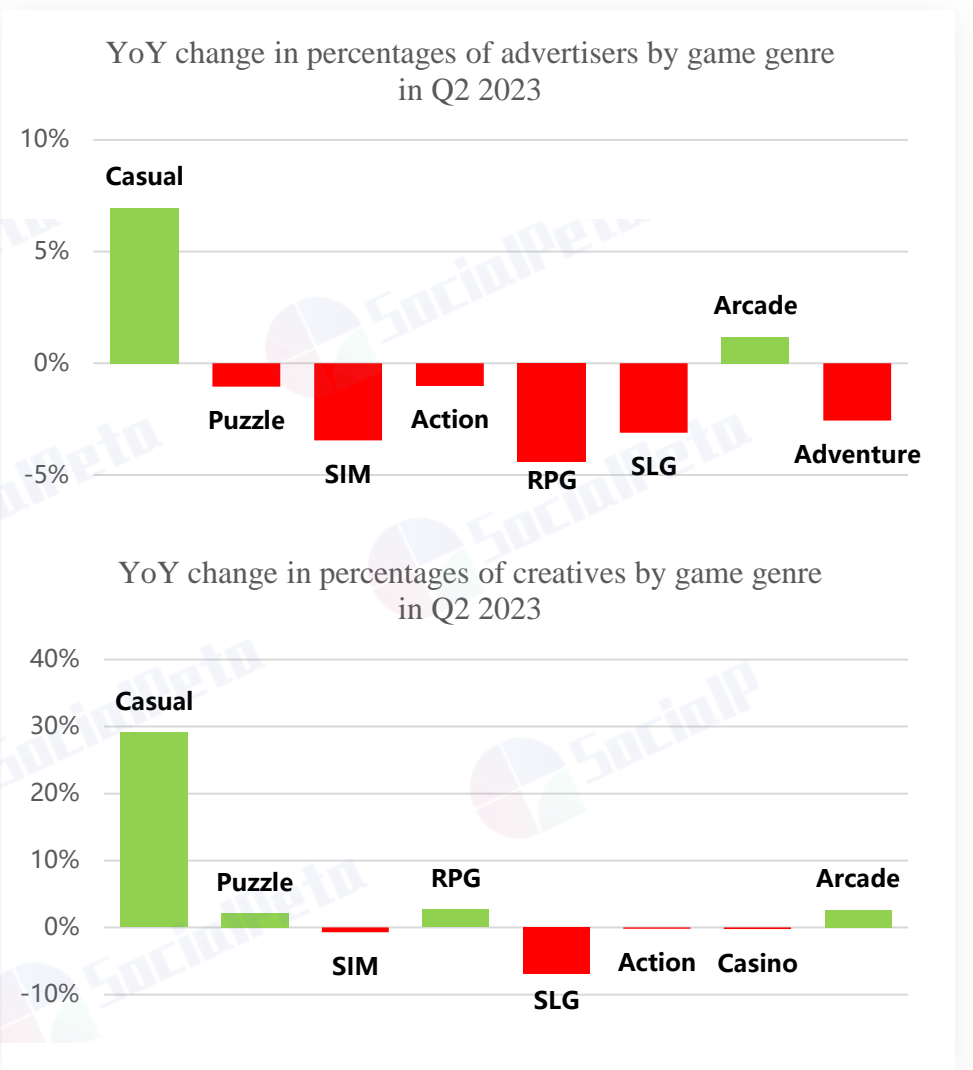
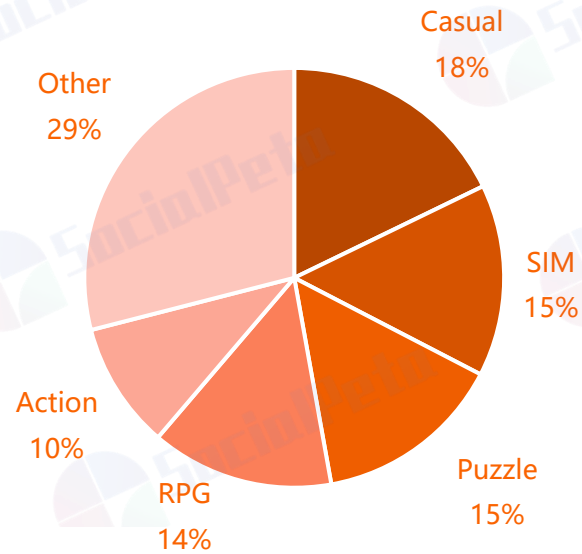
South Korean RPGs contributed 39% of revenue to rank No.1 globally, most of which was from MMO games. “High definition”, “Unreal Engine 5”, and “open world” are the most frequently used keywords for Korean-style MMO games advertisings.

Arcade became one of the top game genres in South Korea, with rising percentages of both advertisers and creatives.

Top game genres by revenue



Top game genres by downloads

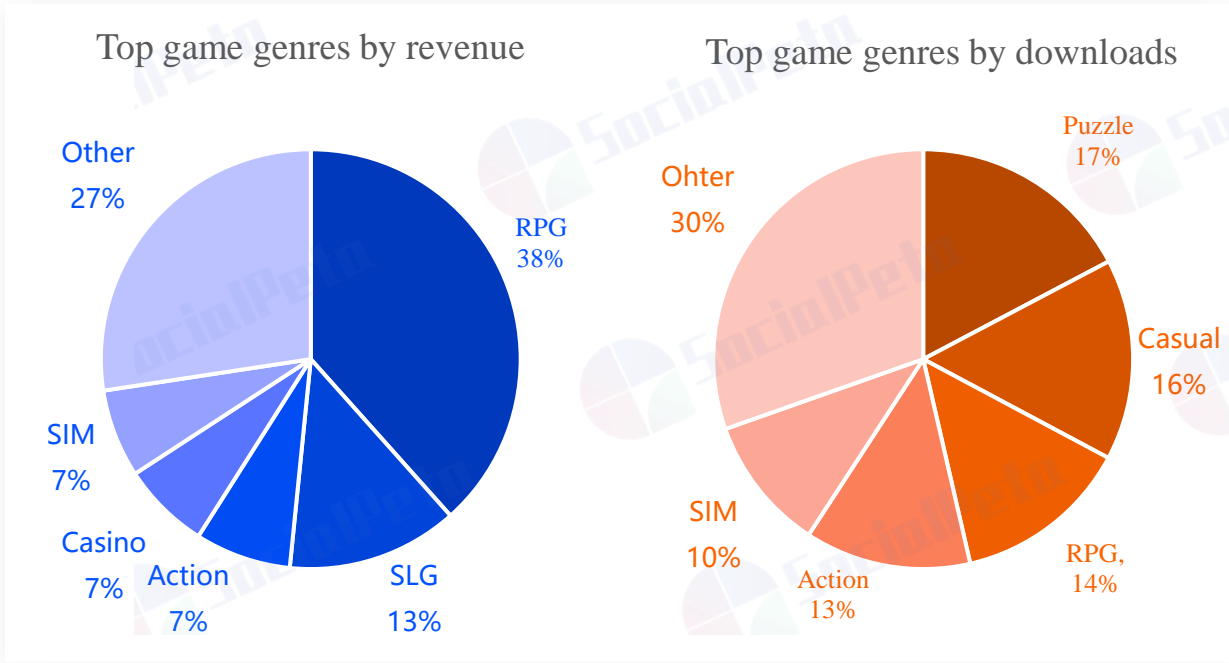
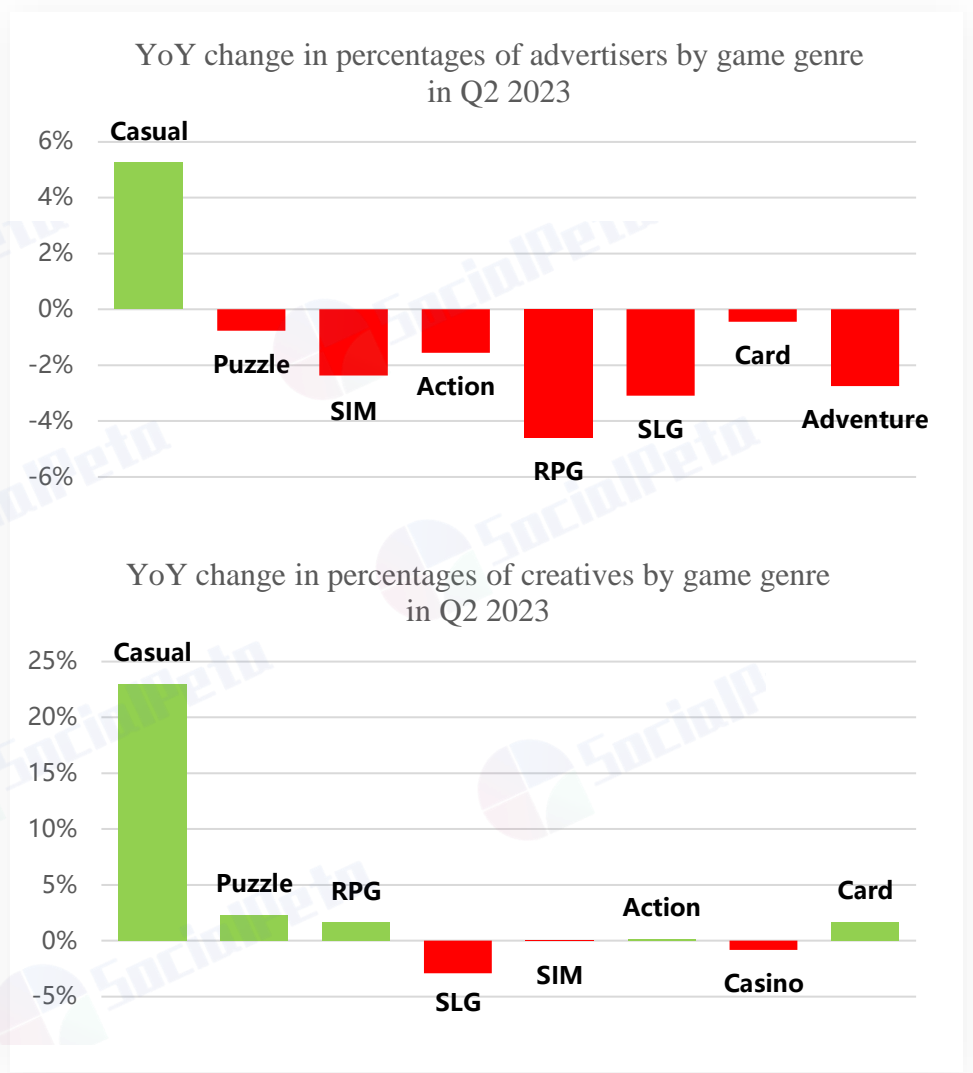




China's HK, Macao & TW: RPGs were the most or one of the most while SIMs increased steadily

In China's HK, Macao & TW, top 3 highest-grossing game genres were RPG, SLG, and action, while top 3 most-downloaded genres were puzzle, casual, and RPG.

There was an obvious upward trend in the average number of creatives released by all game genres in China's HK, Macao & TW.



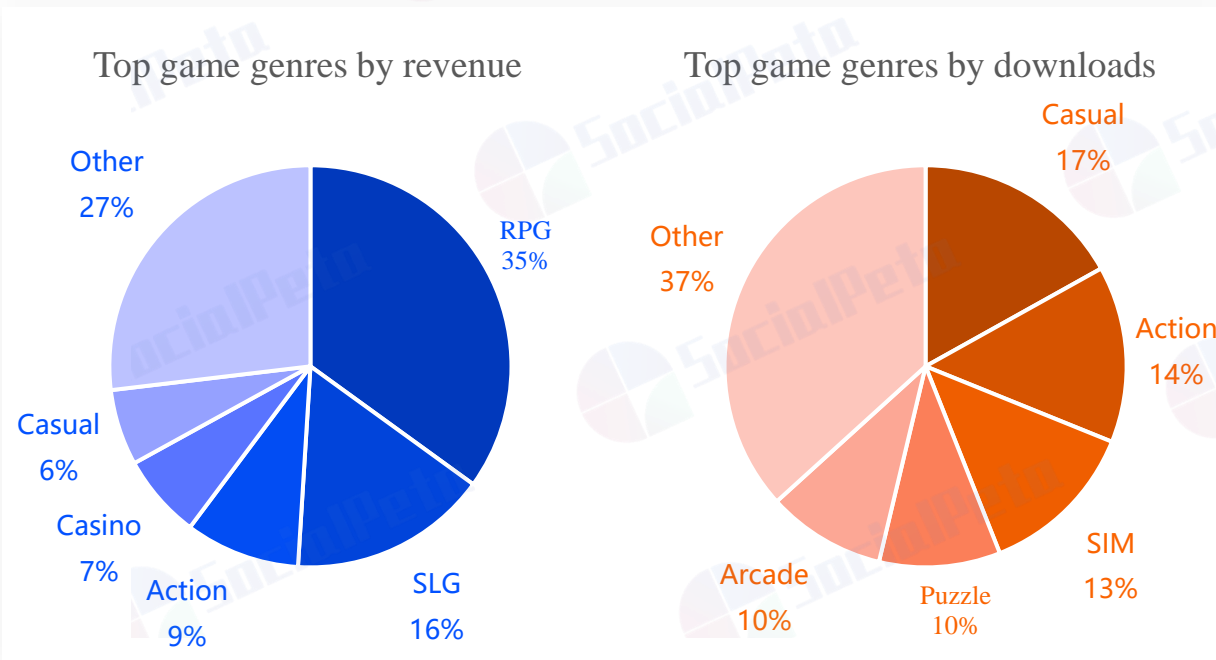
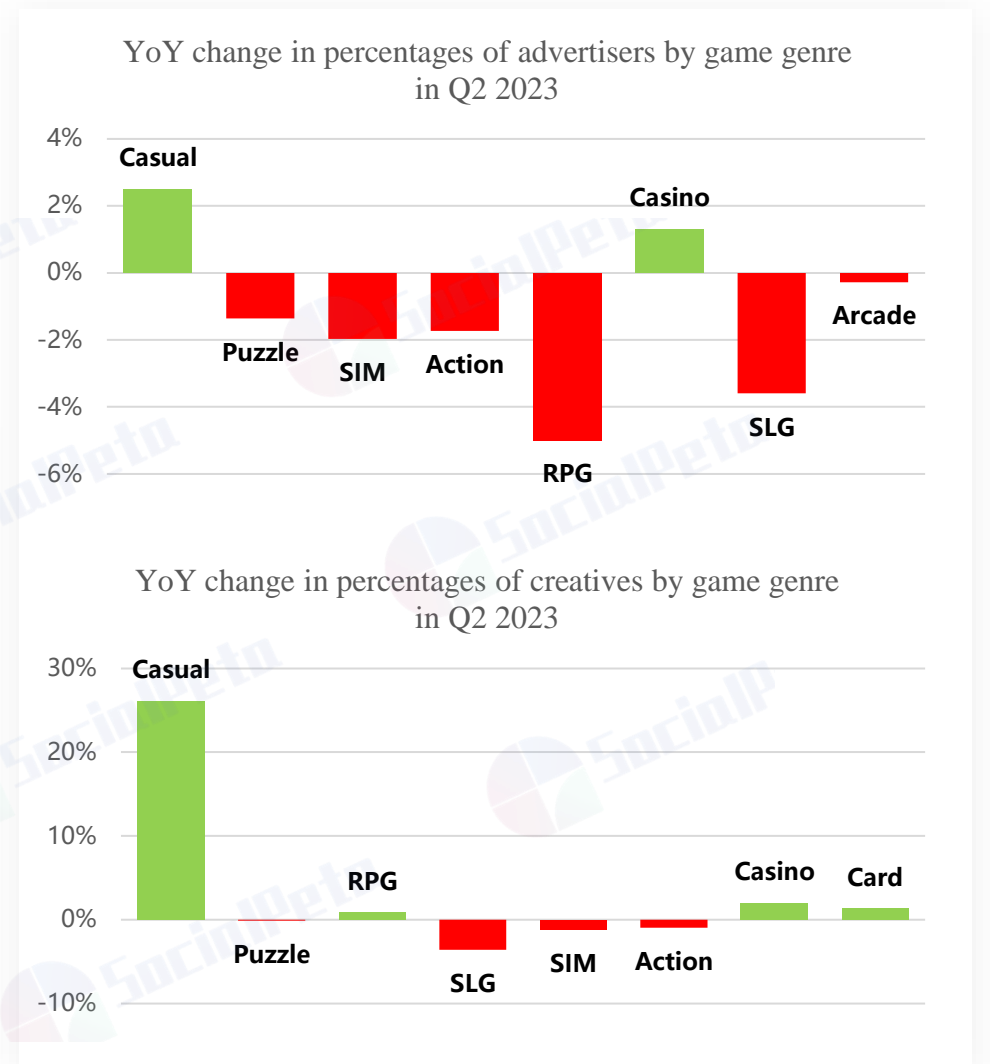
Source: SocialPeta, based on data retrieved from backend data sources
Date Range: Apr.-Jun. 2023



Southeast Asia: Increasing new casino games and leading downloads of action games

Southeast Asian mobile game revenue is still monopolized by RPG, SLG, and action genres. The proportion of advertisers in RPG genre has dropped the most, while the proportion of materials has shown an upward trend. A single advertiser puts more materials and consumes them faster. .

In terms of downloads, action games contributed 14% of total downloads to rank No.1 globally. Highly competitive and rewarding PVP action games are popular among gamers in Southeast Asia, such as MOBA and battle royale games.



Source: SocialPeta, based on data retrieved from backend data sources
Date Range: Apr.-Jun. 2023

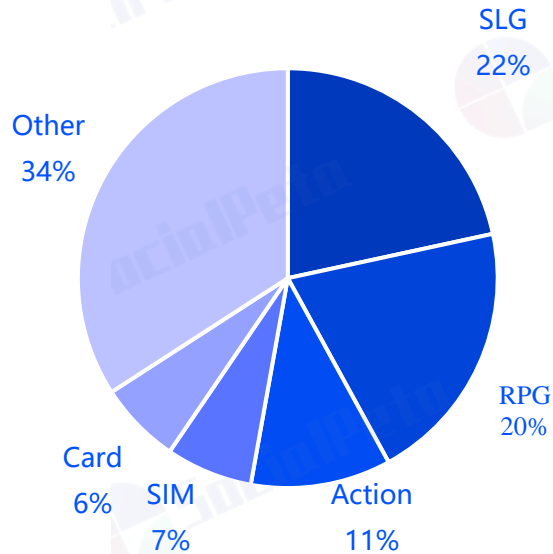


Middle East: Highest revenue from SLGs and overall growth in advertisers of all genres

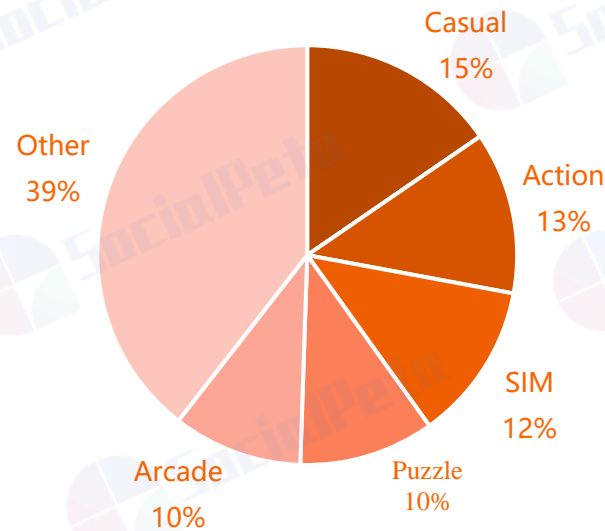
In Middle East, SLGs contributed 22% of revenue to rank No.1 globally, being the most contributor. Action games did great in both revenue and downloads.

As a blue ocean market, the Middle East has huge potential for development. In addition to SLG, RPG and action tracks have the most influx of new games.

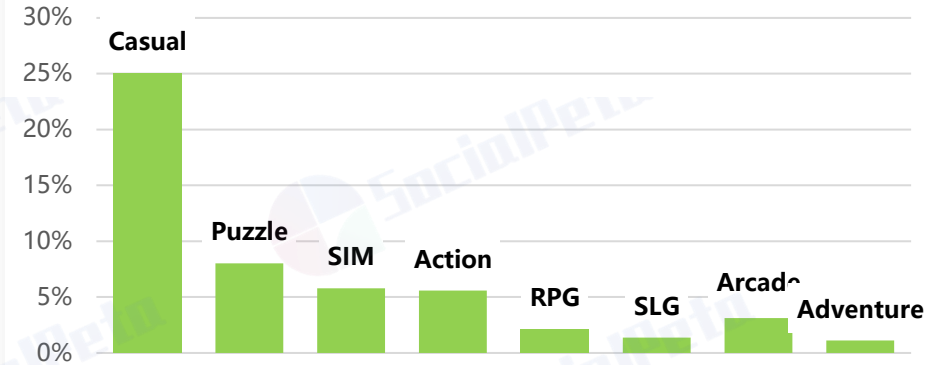
Top game genres by revenue



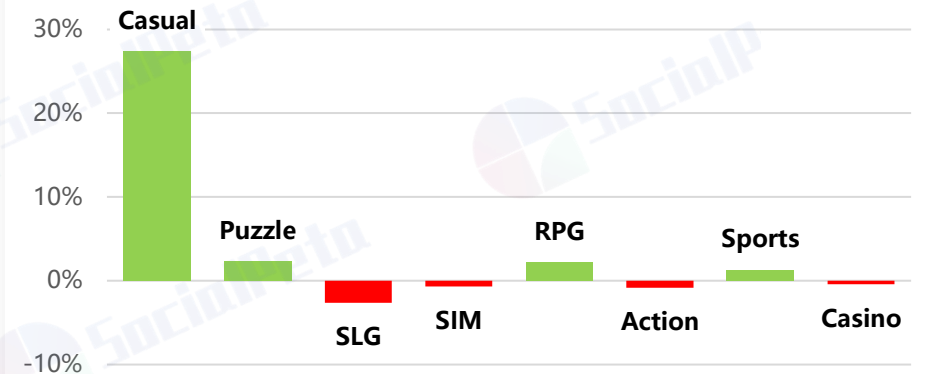
Top game genres by downloads



YoY change in percentages of advertisers by game genre in Q2 2023



YoY change in percentages of creatives by game genre in Q2 2023





Games in Middle East are expected to contribute 1/4 of the revenue of global mobile games, with an annual growth of 20% supported by over ten million paying gamers

>\$3.0 billion

Middle East market in 2021 Games' annual revenue (USD)

As one of the fastest-growing emerging regions of the mobile Internet, the Middle East game market has exceeded \$3 billion by the end of 2020, and will exceed \$5.8 billion by 2025 while maintaining a compound annual growth rate of about 14%.

Nearly 86 million

Saudi Arabia, Turkey, Egypt Number of gamers in Middle East

According to Niko Partners, three major gaming markets (Saudi Arabia, Turkey, and Egypt) in Middle East had about 65.32 million game users in 2021 and are expected to reach 85.8 million game users in 2025 with an annual revenue of \$3.1 billion.

25%

Middle East's share of global mobile gaming market

With the development of 5G, AR, and VR technologies, mobile gaming industry became the fastest-growing in Middle East gaming market. Saudi Arabia, UAE, and Turkey, togetherly accounted for over 80% of the market. Middle East's market size accounts for nearly 1/4 of global mobile gaming market.

\$270

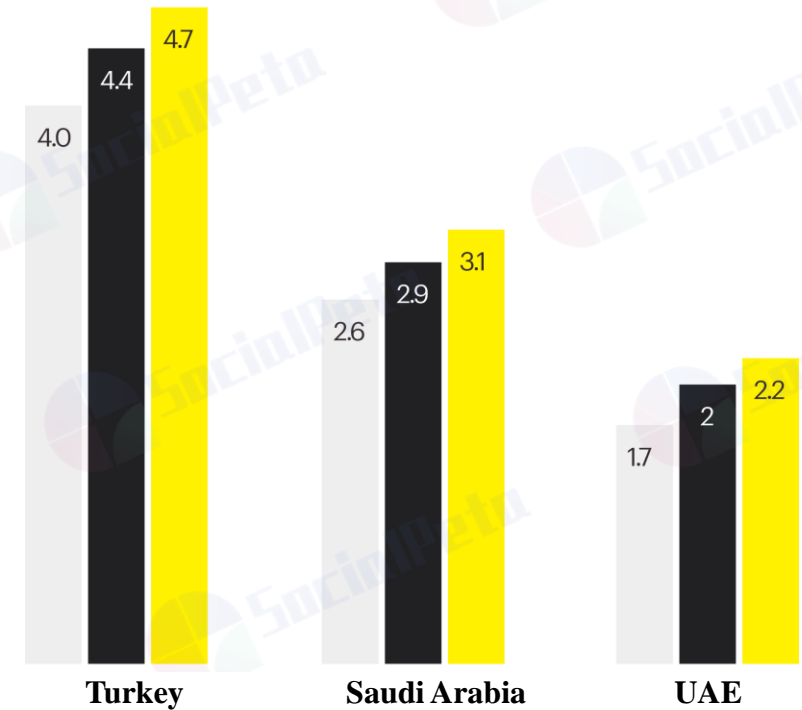
Average revenue per paying user (ARPU) in Saudi Arabia

Middle East saw a rapid growth in gaming revenue, as a result of local users' strong willingness to pay. According to a report by Niko Partners, "MENA is shaping up to be a critical growth market for gaming and esports." And, Saudi Arabia had the highest average revenue per user (ARPU), about \$270.

2018-2020E Mobile gaming market sizes of Turkey, Saudi Arabia, and Egypt

(Unit: 100M USD)

2018 2019 2020E



* The data source is the public information Turkey Game Market Report by Newzoo



Top Game Genres

SLG, RPG, SIM, CASUAL, CASINO



SLGs: mini-game creatives made into successful games

The mini-game creatives not only increase game conversion downloads and lower the purchase cost of a single user, but also become the inspiration for SLG project establishment.

For example, [Frozen City] & [Whiteout Survival] released by Century Games were both about “frozen apocalypse”, inspired by the popular creative “Home Repairs”.

Despite the high popularity of mini-game creatives, live-action dramatic stories still play an essential role in ad creatives for SLGs, accounting for a considerable share.

As a large media buyer, SLGs in Q2 2023 contributed over 1900 monthly advertisers, and 670,000 monthly deduplicated creatives. The monthly advertisers with new creatives accounted for 82%.

For SLGs, most ad creatives were video, accounting for over 85%. About 14% of creatives were images. In addition, SLGs released the most live-action creatives among all game genres.

Century Games: winter apocalypse SLG



Zlongame: ACG wargame Lilith Games: fantasy SLG

Whiteout Survival

A brilliant black horse in Q2 2023 and a frozen apocalypse survival SLG inspired by ad creatives

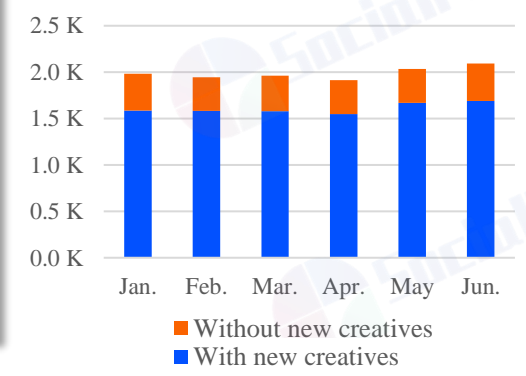
アルケランド

Another ACG/SLG by Zlongame, known for its wargames, was very popular in Japan and South Korea

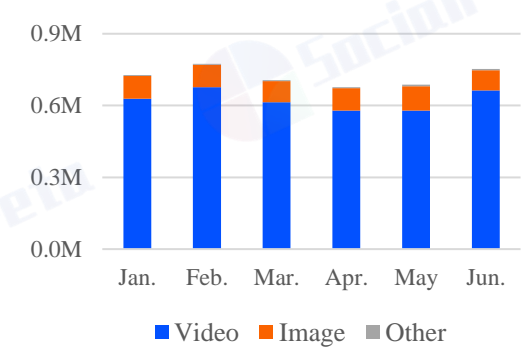
Call of Dragons

Lilith Games prefers live-action creatives with dramatic stories, and creatives for Call of Dragons were no exception.

SLG advertisers with new creatives



New creatives for SLG advertisers



Source: SocialPeta, based on data retrieved from backend data sources
Date Range: Apr.-Jun. 2023



RPG: AI+IP innovative RPGs, a revenue surge in ACG gacha games

In Q2, while many new RPGs stood out, there were regular revenue surges in ACG gacha RPGs. With the rotation of characters and the entry of popular and powerful characters into the pool, game revenue has also risen simultaneously.

[Honkai: Star Rail] by miHoYo topped the free game charts in 114 regions on the day it released, winning popularity for the Honkai label. Upon its launch, the game grossed \$20.60 million within 5 days and \$112 million within 30 days.

For example, both [アーケナイツ (Arknights)] and [ブルーアーカイブ (Blue Archive)], two ACG mobile games published globally by Yostar, reported a significant revenue growth in Q2.

MMO mobile games were the first to introduce real-time interactive AI due to their unique characteristics of strong social connections and strong plot performances.

RPGs ranked No.2 with 2800 monthly advertisers and 850,000 deduplicated creatives. The monthly advertisers with new creatives accounted for nearly 83%.

Of all creatives for RPGs, 21% were images, a much higher percentage than these of all the other game genres, and about 77% were videos.

miHoYo: Honkai IP + Turn-based



Honkai: Star Rail

A miHoYo ACG turn-based game, grossing \$20.6 million within 5 days upon release

Ragnarok Origin Global

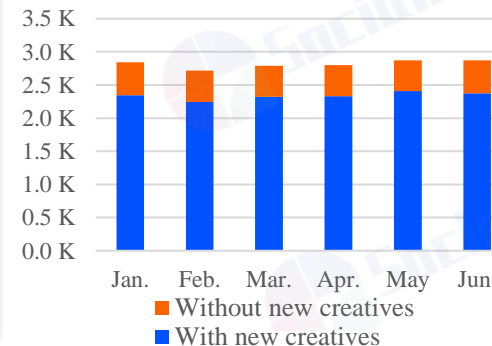
An official sequel to Ragnarok Online, RO fans + massive advertising

天際傳說

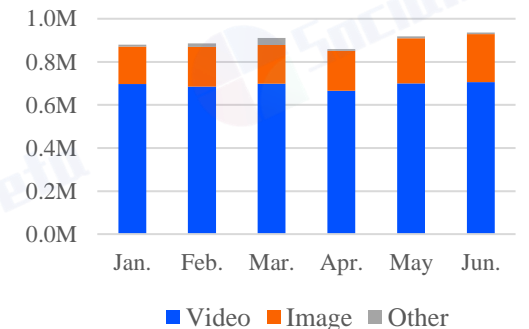
Known as the first AI MMO game, with built-in ChatGPT, AI map generation + AI portrait generation

Gravity: An official sequel to RO SpringGame: AI fantasy open world

RPG advertisers with new creatives



New creatives for RPG advertisers





SIM: Management SIM + ASMR

The SIM genre with a wide audience and stable revenue has also ushered in a lot of hit games. The integration of gameplay and theme innovation have become the main strategies for manufacturers to release new games.

With the help of the 6s golden rule at the beginning of the short video and the high proportion of female players in the SIM genre, makeup gameplay and ASMR gameplay have become the integration options for the SIM genre with the highest input-output ratio.

Most creatives for SIMs attract the audience's attention by teasing them with hardcore curiosity, disgust, planned failure, and other negative feelings.

Report of SIMs advertising in Q2 2023 reveals: 4300 monthly advertisers, and 750,000 deduplicated creatives; the monthly advertisers with new creatives accounted for nearly 80%.

SIMs' main form of creatives was still video, accounting for over 87%. Image creatives accounted for about 10%. In addition, SIMs had the highest percentage of other forms (carousel, Html, playable) of creatives.

Dragonplus: Hospital SIM + ASMR



Niantic: new AR game

WeMaster: Makeup + ASMR

Happy Hospital

Dragonplus focused on hospital SIMs, whose global launches were promoted by popular ASMR mode

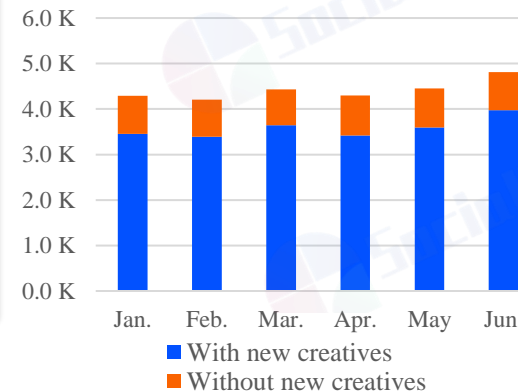
Peridot

Pokémon publisher launched a new AR game which, however, still features pet training.

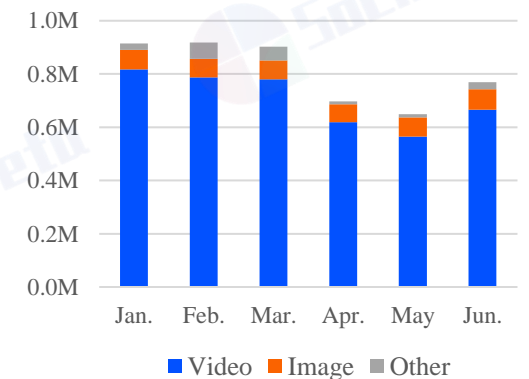
ASMR Monster Makeover

Monster SIMs were trendy, and makeup + ASMR mode remained.

SIM advertisers with new creatives



New creatives for SIM advertisers





Casual Game: TikTok supported the design of hyper-casual games

Parkour, hack and slash, jumping on platforms, and other classic gameplays still dominated the downloads chart of global casual games. Compared with the unity of gameplay, game companies are more willing to fine-tune themes and art.

Hot short video topics and social media memes provided inspiration for hyper-casual mobile games. For example, [Pressure Washing Run], [Fill The Fridge], and other big hit games were inspired by relaxing short videos.

“Casual + X” mobile games continued to gain popularity. In 2022, the cumulative downloads of mixed casual mobile games will be 5 billion monthly, an increase of 3% year-on-year; the cumulative revenue will rise to US\$1.4 billion. In addition to innovative gameplays, Habby and other “casual + X” mobile game companies also kept improving their games’ commercial design, allowing casual mobile games to generate IAP revenue as much as mid-core games.

Casual games topped the advertising chart with 14,000 monthly advertisers and 3.26 million deduplicated creatives. The monthly advertisers with new creatives accounted for nearly 80%.

The main materials for casual genre are still in the form of videos, accounting for over 87%; picture materials account for about 10%, and the proportion of picture materials has increased in May and June.

Habby: SSSnaker (Roguelike)



SSSnaker

Easy and relaxing roguelike, with mixed paying system

Pressure Washing Run

Classic parkour combined with “carpet cleaning”, a hot topic on TikTok

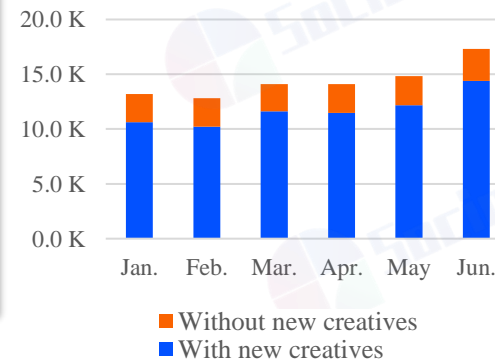
Dumb Ways to Die

A 10-year public benefit mobile game about railway safety, growing more popular thanks to its anniversary event and TikTok publicity

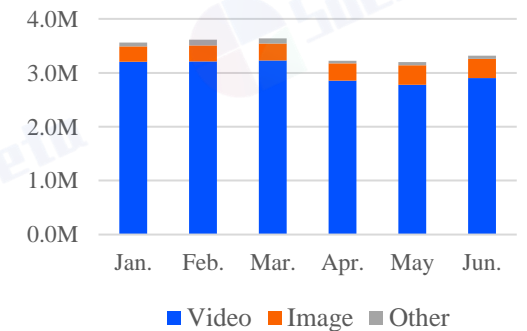
Rollic: Pressure Washing Run

Metro Trains: 10-year public welfare

Casual game advertisers with new creatives



New creatives for casual game advertisers



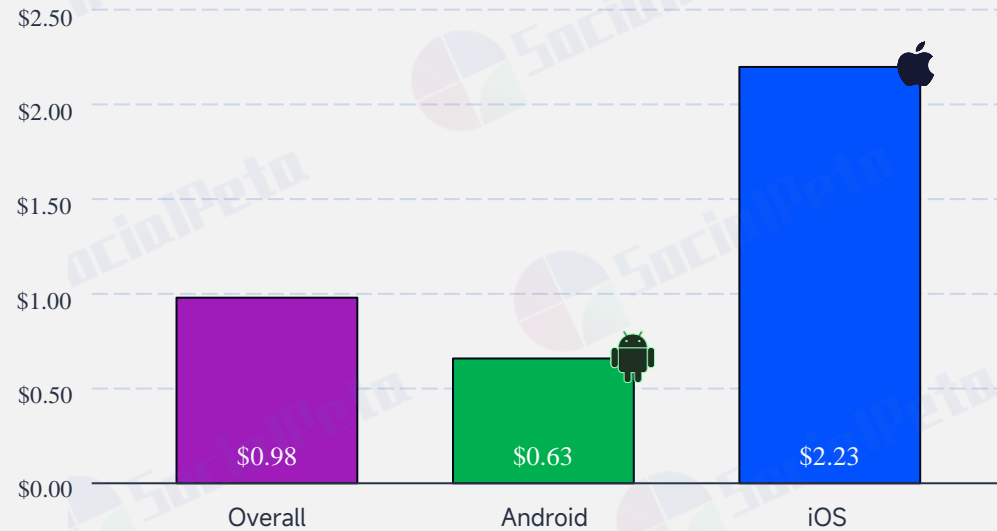


Casual Game: CPI & 7-Day ROAS

Casual Game CPI (Overall and Separately)

From 2022 to 2023, the overall Cost Per Installment (CPI) was around \$1, a slight decline compared to [the previous two years](#).

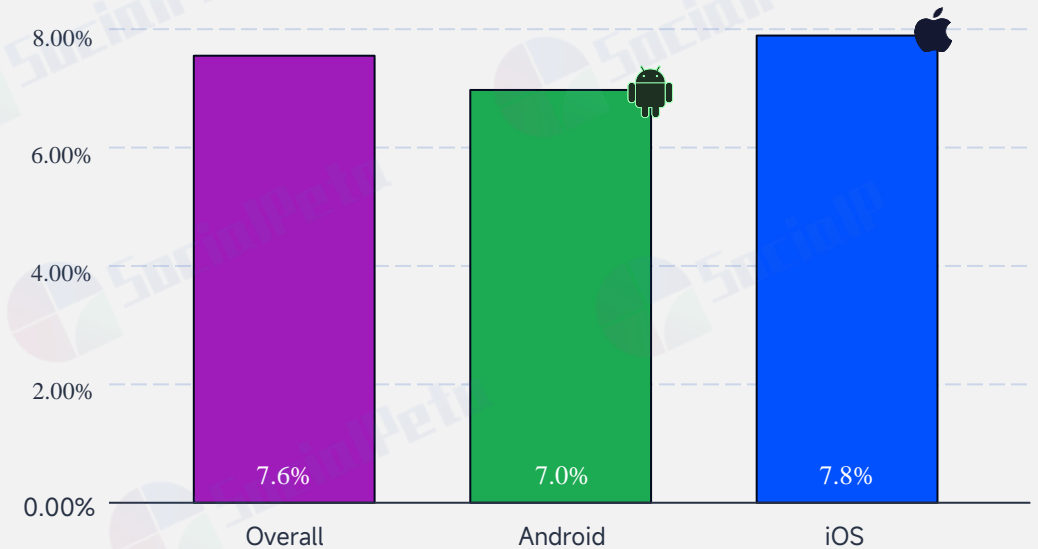
- ◆ In the post-ATT (App Tracking Transparency) era, Android is still the most cost-effective platform for casual game apps, with an average CPI of \$0.63.
- ◆ While the average CPI on iOS reached \$2.23, over 3 times of that on Android.



7-Day ROAS (Overall and Separately)

Despite the changes in how users spend money for games and play games, Return On Advertising Spend (ROAS) remains to be a primary indicator for many game advertisers to assess their advertising cost.

- ◆ Casual games' overall 7-day ROAS is 7.6%.
- ◆ Though it's more cost-effective to acquire Android users, Android and iOS have almost the same 7-Day ROAS.
- ◆ 7-Day ROAS is 7.8% on iOS, slightly higher.





Casino Game: 10-year games were still popular

Casino games differ greatly in different regions. For example, slots, bingo, and poker are the three most popular game genres globally, but mahjong and fish-catching are more preferred in China's HK, Macao & TW regions.

In terms of game popularization and advertising systems, casino games prefer the Android system. There were over 4100 casino game advertisers globally in 2022, and casual game advertisers on Android accounted for as high as 76% of advertisers.

On the advertising, revenue, and downloads charts, new casino games were often seen in Southeast Asia, but old casino games were dominant in other regions.

Advertising of casino games in Q2 2023 is as follows: 2600 monthly advertisers, and 570,000 deduplicated creatives; the monthly advertisers with new creatives accounted for nearly 81%.

Due to the nature of casino games, video creatives, especially live-action ones, are usually found more convincing and persuasive. Therefore, 82% of casino games' creatives were video and about 16% were images.



Bingo Blitz

12 years online, \$21 million in monthly revenue, most creatives were about perks

Cash Frenzy

A popular slot game of Bole Games, most creatives were live-action, downloadable fake games, and other volume-buying schemes.

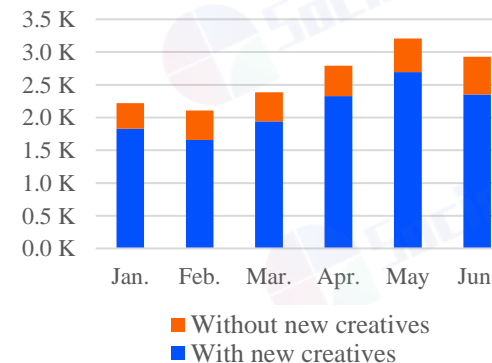
Solitaire

A classic and popular poker game, endorsed by non-celebrities with very effective puzzle creatives

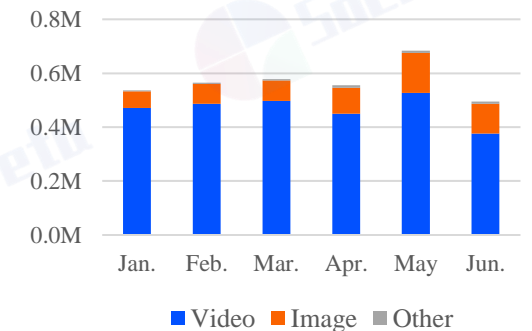
Bole Games: Slots

Doodle Mobile: Card

Casino game advertisers with new creatives



New creatives for casino game advertisers





04

Marketing Insights into Big Hit Games in Q2 2023

2023Q2 POPULAR MOBILE GAME MARKETING



Viking Rise: IGG's major new game in Q2

The game had more deduplicated creatives in Q2 than IGG's knock-out product [Lords Mobile]

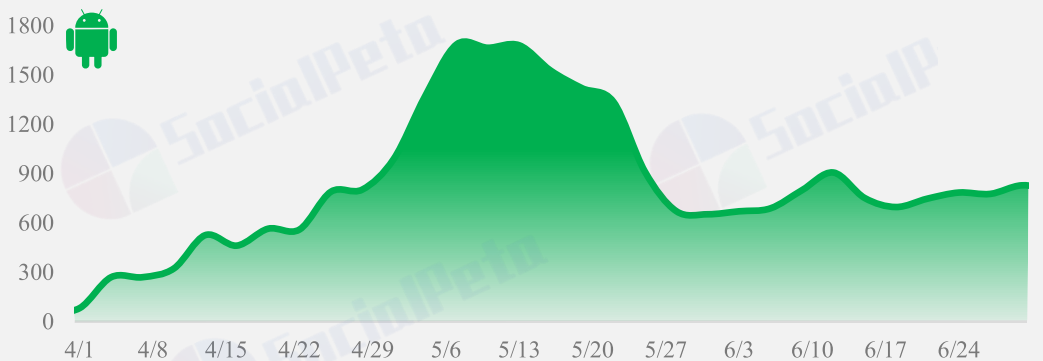
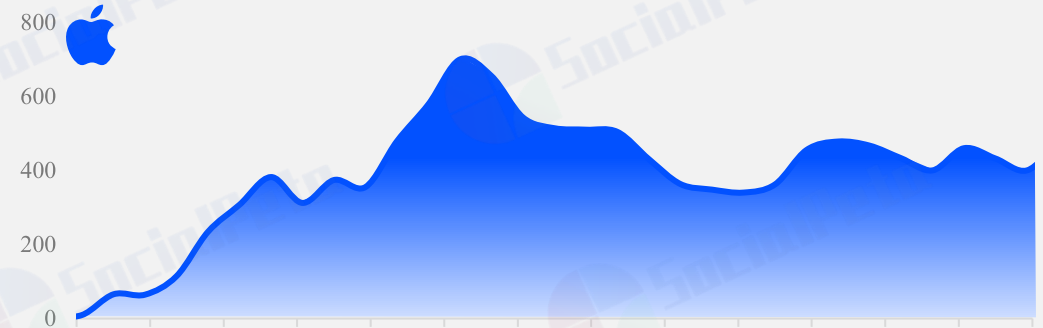
Viking Rise

Viking-based IGG

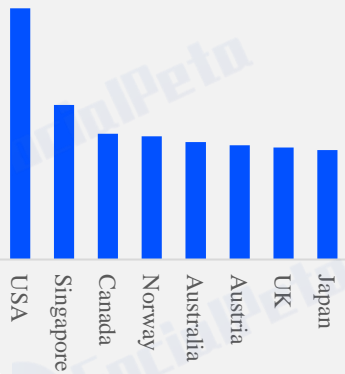
Q2 2023

Total Deduplicated Creatives: **9.1K**

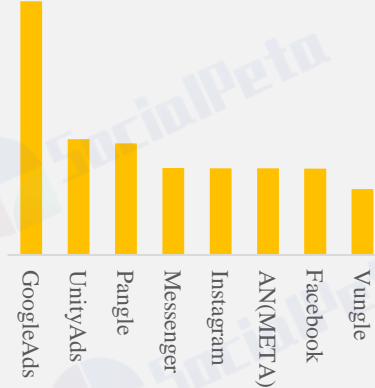
Percentage of monthly new creatives: **78.24%**



Top Countries/Regions by Advertising



Top Advertising Platforms



Source: SocialPeta - Advertiser Analysis
Providing an overview of advertisers' advertising within the date range. Data are processed and presented.
Date Range: Apr.-Jun. 2023



An active popular creative of **Viking Rise**



Advertising Platform:  Pangle

Regions of Advertising: South Korea, Portugal, Ireland, UAE...

Advertising Copy:

Lead your Viking warriors and explore uncharted waters to fight for glory!

Formula for the creative: Explore + Build → Prosperous City

316

Popularity

435.4K

Impressions



Click to view the complete creative



神蹟：血舞者：The most outstanding MMO game among Chinese Traditional games in Q2

Thanks to the game, the game publisher “Eskyfun” was again at a peak of game publishing in China’s HK, Macao & TW, and Singapore & Malaysia.

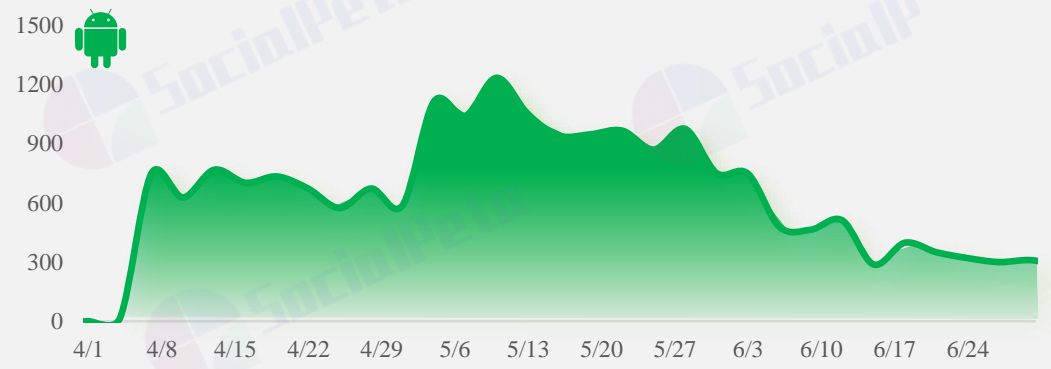
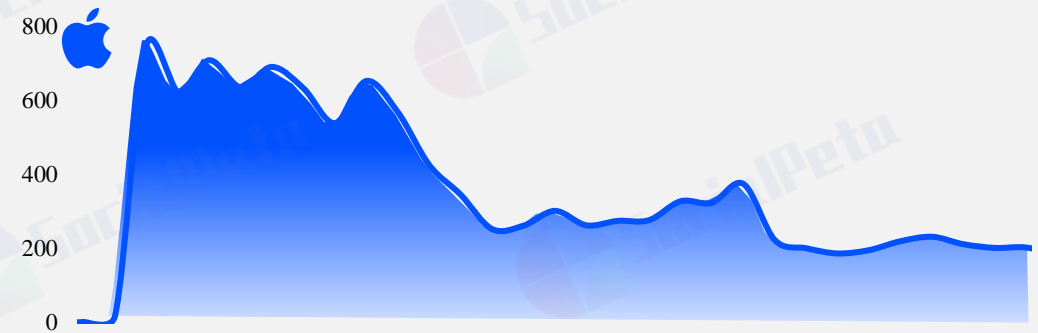
神蹟：血舞者

Korean-style MMO Eskyfun

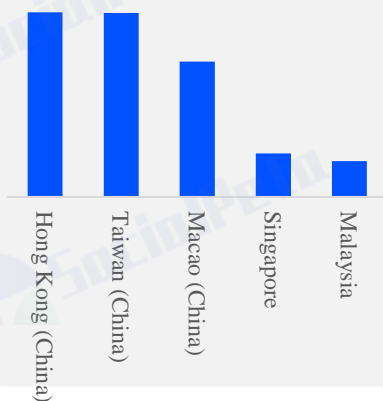
Q2 2023

Total Deduplicated Creatives: **9.9K**

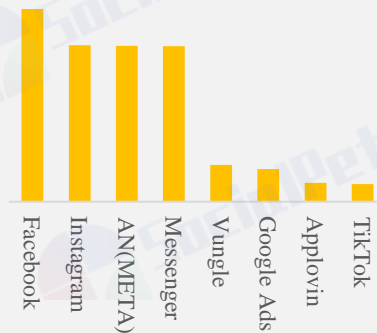
Percentage of monthly new creatives: **68.92%**



Top Countries/Regions by Advertising



Top Advertising Platforms



Source: SocialPeta - Advertiser Analysis
Providing an overview of advertisers' advertising within the date range. Data are processed and presented.
Date Range: Apr.-Jun. 2023



An active popular creative of 神蹟：血舞者



Advertising Platform: **facebook**

Regions of Advertising: Hong Kong (China), Macao (China), Taiwan (China)

Advertising Copy:

Overwhelming popularity! Global gamers are crazy about it 📱

HD modeling ✨ Special classes ✨ Open world

Download to unlock! 2 billion Diamond 💎 💎 💎

Formula for the creative:

KOL recommendation + True or fake game + Plenty of perks



Click to view the complete creative

270

Popularity

373.3K

Impressions



Honkai: Star Rail, leading a trend of ACG turn-based card games

As miHoYo's latest game, its overseas revenue in May once surpassed that of [Genshin Impact]

Honkai: Star Rail

ACG card RPG miHoYo

Q2 2023

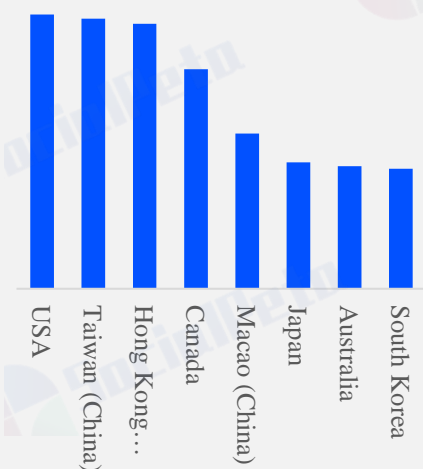
Total Deduplicated Creatives: **5.8K**

Percentage of monthly new creatives:

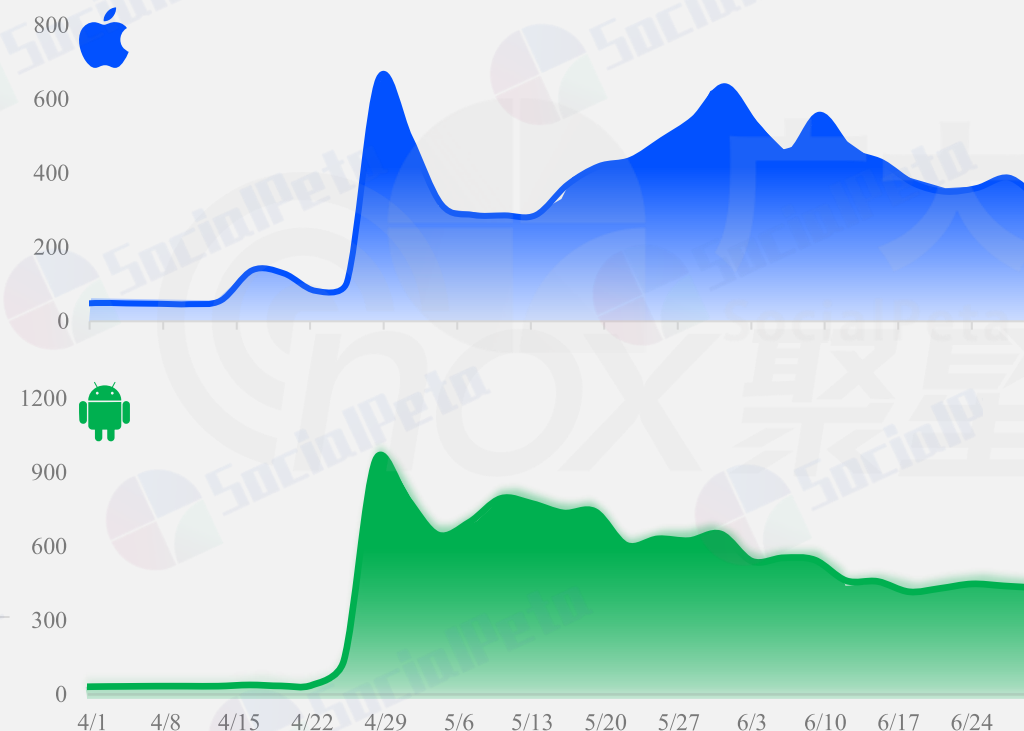
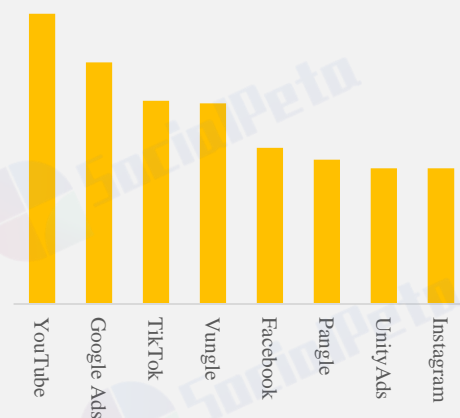
69.27%



TOP Countries/Regions by Advertising



Top Advertising Platforms



Source: SocialPeta - Advertiser Analysis
Providing an overview of advertisers' advertising within the date range. Data are processed and presented.
Date Range: Apr.-Jun. 2023



An active popular creative of **Honkai: Star Rail**



Advertising Platform: **TikTok**

Regions of Advertising: USA

Advertising Copy:

I've been having lots of fun with this March 7th filter and the Star Rail VR is madddd cool #StarRailChallenge #March7th #honkaistarrail #hoyo creators

Formula for the creative:

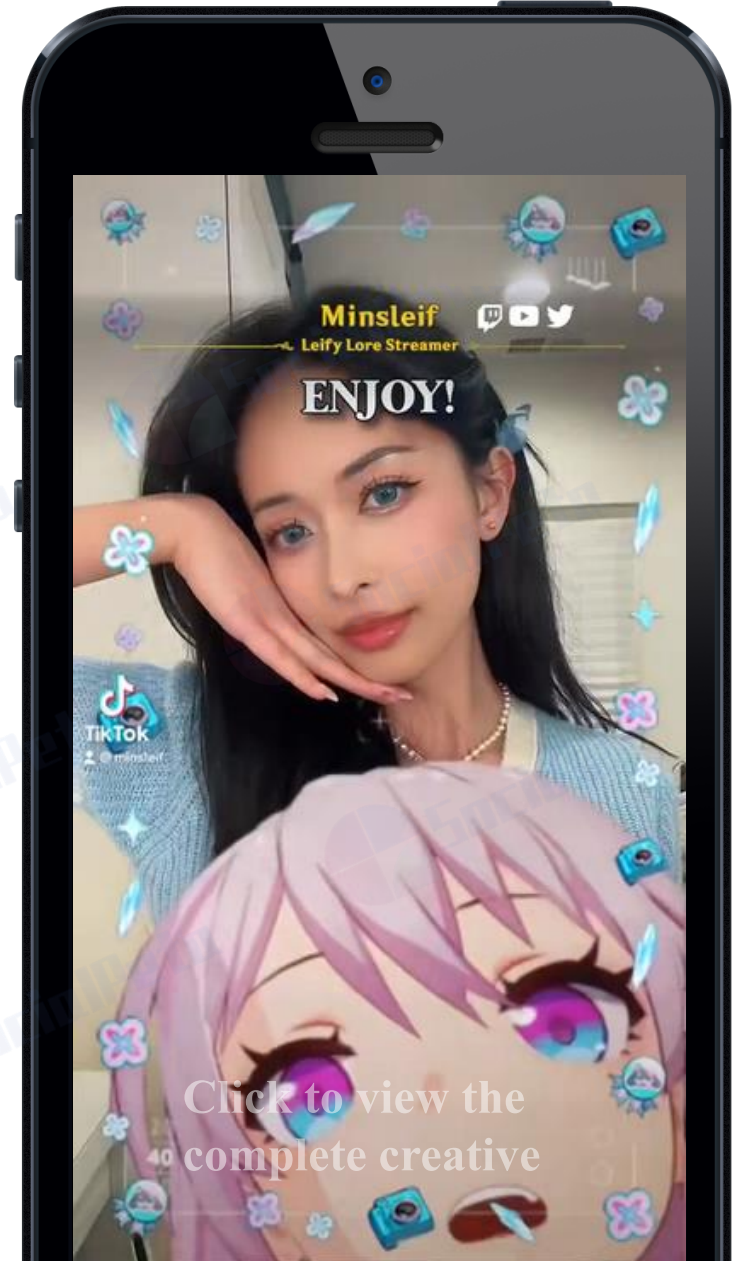
combined with the UGC OF "March 7th" collaboration filter

85.9K

Likes

8.6M

Impressions



Click to view the complete creative



MONOPOLY GO! Popular for being light social in Europe and USA

Released on 12 April, the game was successful in the European and American casual game market thanks to its combination of random data, business, and social.

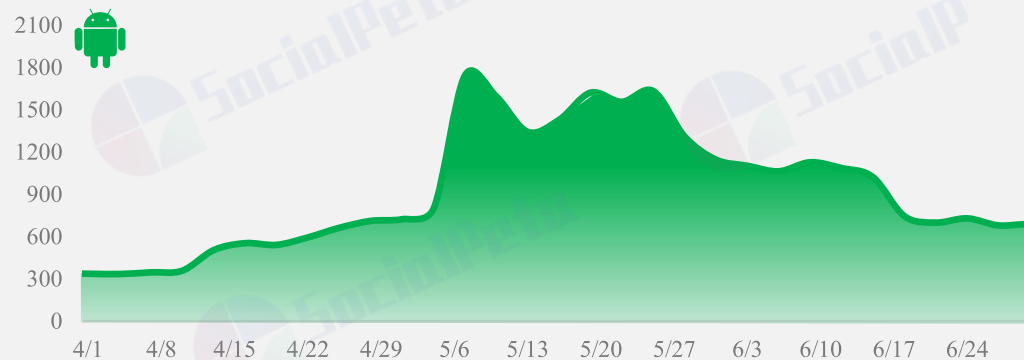
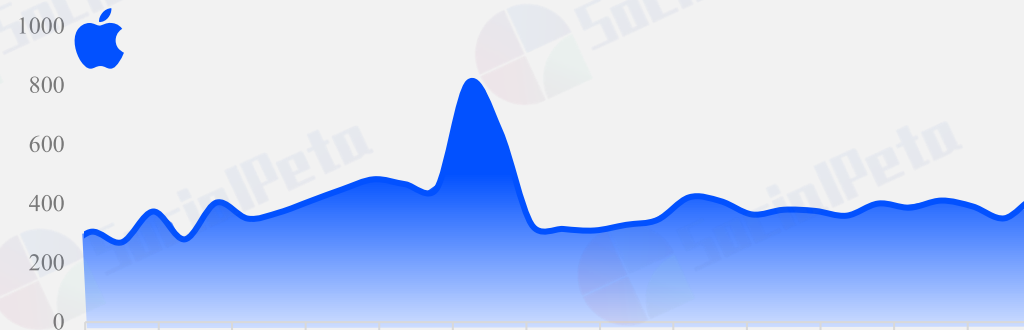
MONOPOLY GO!

“Monopoly”-type board game Scopely

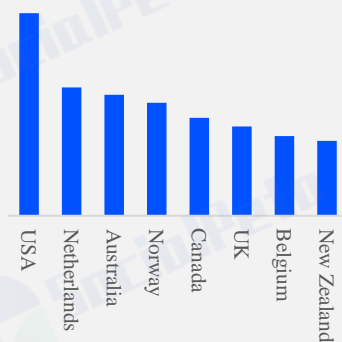
Q2 2023

Total Deduplicated Creatives: **6.8K**

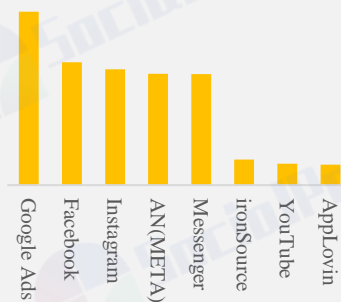
Percentage of monthly new creatives: **63.13%**



Top Countries/Regions by Advertising



Top Advertising Platforms



Source: SocialPeta - Advertiser Analysis
Providing an overview of advertisers' advertising within the date range. Data are processed and presented.
Date Range: Apr.-Jun. 2023



An active popular creative of **MONOPOLY GO!**



Advertising Platform: **YouTube**

Regions of Advertising: Canada, UK, Australia, USA

Duration: 58 days

Formula for the creative: Live action + Game display + PvP



90K

Estimated Conversion

17.9M

Impressions

Source: SocialPeta - Advertiser Analysis displaying the new or relatively popular creatives within the date range.
Date Range: Apr.-Jun. 2023



Parking Jam 3D: A puzzle hyper-casual big hit in Q2

The game was launched as early as 2020, and remained on the top free game chart after 3 years. Its classic gameplay once influenced the media buying market.

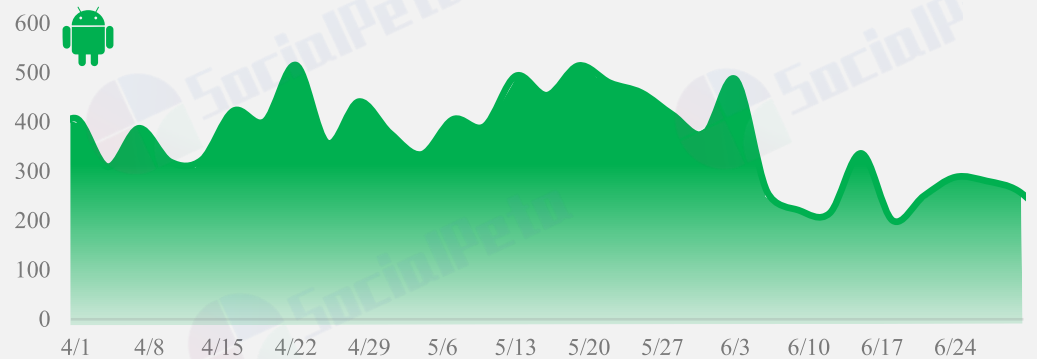
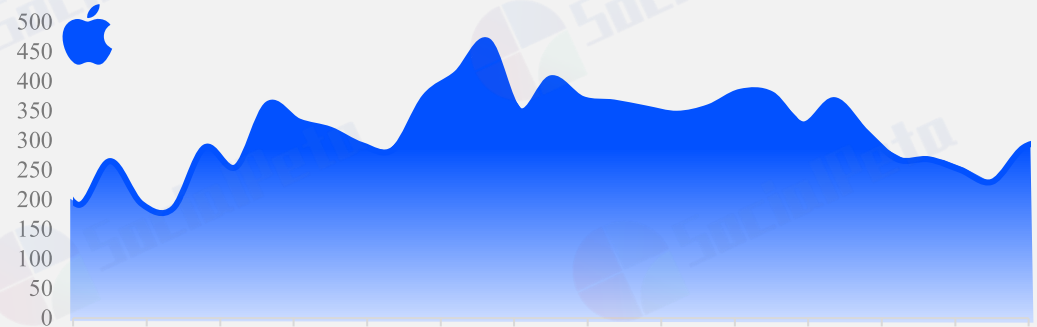
Parking Jam 3D

“Klotski”, car-parking, hyper-casual Popcore

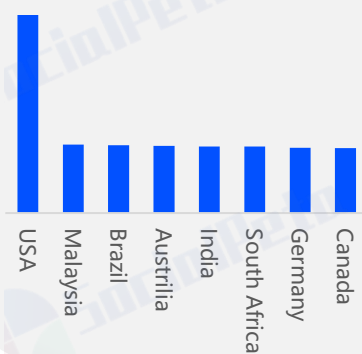
Q2 2023

Total Deduplicated Creatives: **3.5K**

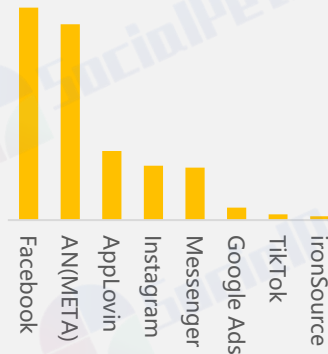
Percentage of monthly new creatives: **59.19%**



Top Countries/Regions by Advertising



Top Advertising Platforms



Source: SocialPeta - Advertiser Analysis
Providing an overview of advertisers' advertising within the date range. Data are processed and presented.
Date Range: Apr.-Jun. 2023



An active popular creative of **Parking Jam 3D**



Advertising Platform: **facebook**

Regions of Advertising: Malaysia, South Africa, Chile, Japan...

Advertising Copy: Helps me unwind 😊

Formula for the creative:

Similar to [羊了个羊], the 1st stage is easy and the 2nd stage is difficult like hell

270

Popularity

948.4K

Impressions



Click to view the complete creative



THANKS

2023Q2 GLOBAL MOBILE GAME MARKETING REPORT

