

A background photograph of a family of four—two adults and two children—sitting on a carpet and working together to assemble a large puzzle. The scene is softly lit, creating a warm, collaborative atmosphere.

Marketing Insights into Global Casual & Puzzle Games for Q1 2024

www.socialpeta.com



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

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

6M

APP Advertisers

1.6B

APP Ad Creatives

1.20M

Daily Updates

Website: www.socialpeta.com



Supersonic from Unity is an industry-leading mobile game publishing solution which provides game developers with the infrastructure and know-how to create, launch, and scale their games. As part of the Unity suite of solutions, Supersonic helps game developers turn their games into scalable and sustainable businesses by taking a transparent approach to publishing and empowering developers with powerful technology and access to metrics.

Supersonic from Unity had 3 games in the top 10 most downloaded hyper-casual games worldwide in 2023 - Bridge Race #2, Going Balls #3, Tall Man Run #9, making Unity the 4th largest games publisher and the 2nd largest hyper-casual games publisher worldwide by downloads in 2023.*

100+

Games Published

80+

Games Reached Top 10

4.9B+

Total Installs

Website: www.supersonic.com

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Great Time for Instant
Games to expand
global market (Special)



01

Q1 2024 Overall Marketing Trends in Global Mobile Games

Advertising Trends in Global Mobile Games

After a continuous increase in the number of advertisers, monthly advertisers remained stable at 50K in 2024.

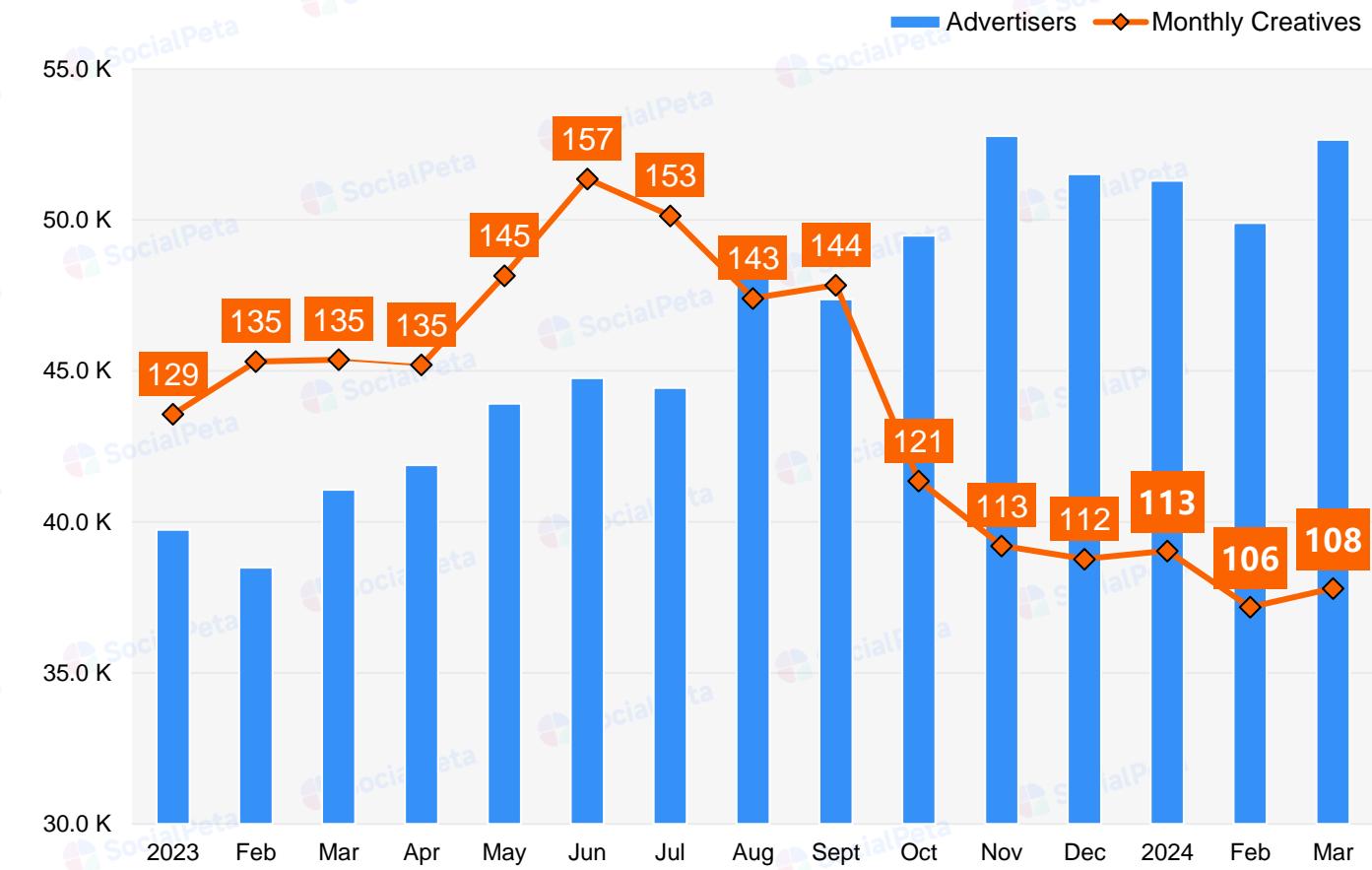
Advertising reached a plateau, with about 110 monthly creatives.

Q1 2024 Monthly Active Advertisers

51.3K YoY 28.9%↑

Q1 2024 Monthly Creatives

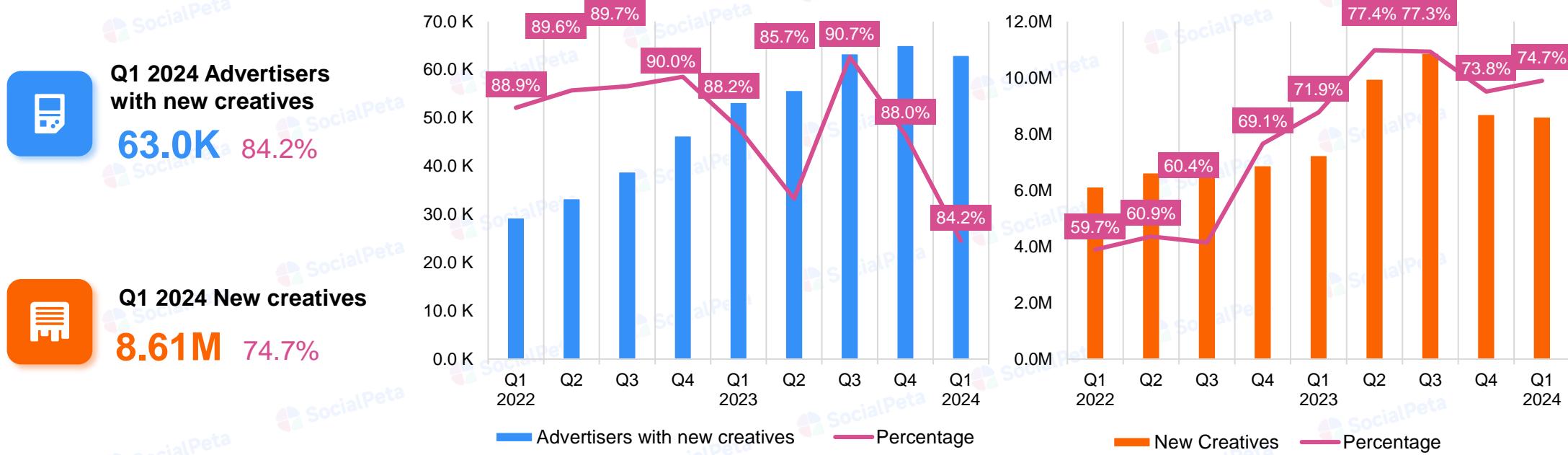
109 YoY 18.0%↓



Quarterly Trends of New Creatives for Global Mobile Games

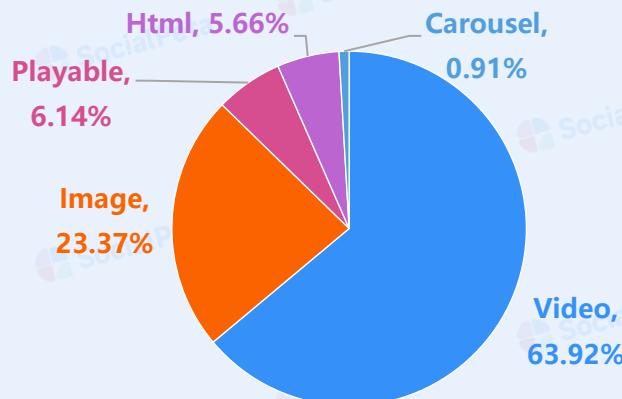
Increasingly high quality was expected from ad creatives by the market, so advertisers had to keep releasing new creatives to attract players.

- Advertisers with new creatives continued to rise QoQ to peak in Q3 2023. But Q1 of this year saw a slight decline in the number of advertisers with new creatives.
- New creatives' percentage had been growing until it remained stable above 70% in 2023. In Q1 2024, new creatives accounted for 74%, an increase of about 1% compared to the last quarter.



Q1 2024 Types of Ad Creatives for Global Mobile Games

% of creatives by type in Q1



Impressions per ad creative for active mobile games in Q1

161.2K

iOS: 200.9K
Android: 154.1K

Quarterly Trends of Advertisers on iOS & Android

- Total number of advertisers has been on the rise. In Q1 2024, the number of advertisers for Android was 2.1 times of that for iOS.
- Q1 2024 recorded over 18K advertisers for iOS, increasing for three consecutive quarters.





Percentages of Advertising by Game Genre in Q1 2024

Casual games accounted for a rising share of advertisers. Puzzle games reported an over 2% increase YoY in the share of advertisers; Casual and action games increased by nearly 0.7% QoQ, the highest growth, in the share of creatives.

Genre	% of Advertisers	QoQ	YoY
Casual	36.62%	0.73%	0.83%
Puzzle	13.12%	0.57%	2.10%
SIM	8.80%	-0.11%	0.15%
Action	6.42%	-0.27%	-0.24%
Arcade	5.59%	-0.02%	-1.02%
RPG	5.49%	-0.12%	0.26%
Casino	4.74%	-0.23%	-1.21%
SLG	4.06%	-0.09%	0.43%
Card	2.96%	-0.17%	-0.98%
Adventure	2.76%	-0.13%	-0.27%

Genre	% of Creatives	QoQ	YoY
Casual	39.59%	0.69%	1.97%
Puzzle	12.31%	-0.70%	1.17%
RPG	8.61%	0.04%	-0.55%
SIM	6.88%	0.22%	-0.99%
Action	5.98%	0.69%	1.78%
SLG	5.93%	-0.10%	-0.44%
Arcade	4.17%	0.00%	0.50%
Casino	3.66%	-1.33%	-2.49%
Card	2.95%	-0.20%	-0.72%
Board	2.09%	-0.07%	-0.29%



02

Q1 2024 Marketing Insights into Casual & Puzzle Games

Top 20 Casual Games by Advertising in Q1 2024



iOS			Android		
1  Legend of Mushroom 4399	11  Okara Escape Jets group co.limited	1  MONOPOLY GO! Scopely	11  Burrow Land VigaFun		
2  マジックカード Bingchuan Network	12  My Cruise EYEWIND	2  Braindom Matchingham Games	12  Doodle Magic 大梦龙途		
3  Legend of Mushroom: Rush 4399	13  超能世界 Bingchuan Network	3  Block Blast! Hungry Studio	13  Happy Match Cafe™ King's Fortune		
4  1945 OneSoft	14  英雄戰紀 Bingchuan Network	4  マジックカード Bingchuan Network	14  Jewel Abyss ENP Games		
5  Block Blast! Hungry Studio	15  Galaxiga OneSoft	5  1945 Air Force OneSoft	15  Dice Dreams™ SuperPlay.		
6  Block Puzzle Doodle Mobile	16  Doodle Magic 大梦龙途	6  Garden Affairs Judian Technology	16  Twisted Tangle Rollic Games		
7  Royal Match Dream Games	17  ぼちゃガチャヨ! Qingci Games	7  Word Search Block Puzzle Game Pandas of Caribbean	17  Adventure Island Merge: Save FlyBird		
8  Adventure Island Merge: Save FlyBird	18  Wing Fighter Joyfort	8  Titan War Bingchuan Network	18  Royal Match Dream Games		
9  Happy Match Cafe™ King's Fortune	19  Resortopia DH Games	9  Dragonscapes Adventure Century Games	19  Sudoku Hungry Studio		
10  Stormshot FunPlus	20  Rent Please! Landlord Sim Shimmer Studio	10  Legend of Mushroom: Rush 4399	20  Build Master: Bridge Race First Fun		

Source: SocialPeta - Advertiser Analysis; advertisers are sorted (from high to low) by the numbers of their deduplicated creatives within the date range.
Date Range: Jan., 2024 - Mar., 2024



Top 20 Puzzle Games by Advertising in Q1 2024



iOS



Android

1		Block Blast!	Hungry Studio	11		Ten Crush	Kiwi Fun	1		Braindom	Matchingham Games	11		Bus Jam	Rollic Games
2		Block Puzzle	Doodle Mobile	12		Candy Crush Saga	King	2		Block Blast!	Hungry Studio	12		Candy Crush Saga	King
3		Royal Match	Dream Games	13		Traffic Puzzle	Huuuge Games	3		Garden Affairs	Judian Technology	13		Match Frenzy: 3D Match	JoyPlay
4		Braindom	Matchingham Games	14		Find Out	EYEWIND	4		Burrow Land	VGF Global	14		Find It Out - Hidden Object	Guru Puzzle
5		Happy Match Cafe™	KINGS FORTUNE	15		Tap Color Pro	Century Games	5		Happy Match Cafe™	KINGS FORTUNE	15		Jigsaw Puzzles for Kids	Spekadol
6		Brain Who? Tricky Riddle Tests	Matchingham Games	16		Story Painting	Woohoo Studios	6		Twisted Tangle	Rollic Games	16		Seat Away	Rollic Games
7		Okara Escape	Jets group co.limited	17		Dark Color	Woohoo Studios	7		Jewel Abyss	ENP Games	17		Brain Who? Tricky Riddle Tests	Matchingham Games
8		Riddle Test	Matchingham Games	18		동글동글 거위헬스장	Qingci Games	8		Adventure Island Merge: Save	FlyBird	18		Bright Objects	Cleverside
9		ぽちやガチョ!	Qingci Games	19		Hidden Objects: Find It Out	Guru Puzzle	9		Royal Match	Dream Games	19		Coloring Book: Color by Number	Doodle Mobile
10		Calming Crosswords Puzzle	Soft Towel	20		Twisted Tangle	Rollic Games	10		Sudoku	Hungry Studio	20		Gardenscapes	Playrix

Observations about Advertising Casual & Puzzle Mobile Games in Top Countries/Regions in Q1 2024

Advertising in Europe, the US, Southeast Asia, and South America faced the toughest competition, where advertisers and average ad creatives were much more than in any other region.

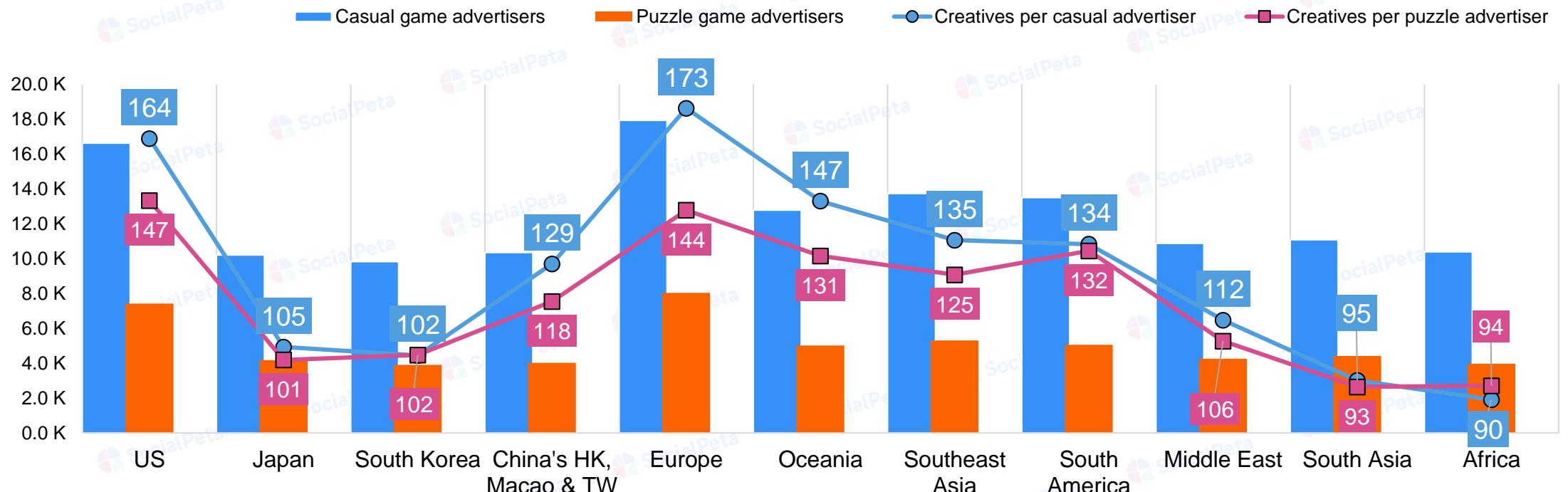
The highest number of creatives per casual game in Q1 was in Europe

Europe reported the highest number of 173 quarterly creatives per casual game. Meanwhile, Europe and the US both had over 16K casual game advertisers in the quarter.

The highest number of creatives per puzzle game in Q1 was in the US

The US was the most competitive market for advertising puzzle games, with 147 creatives per advertiser in Q1 2024.

The second market was Europe, with 144 creatives per advertiser in the quarter.

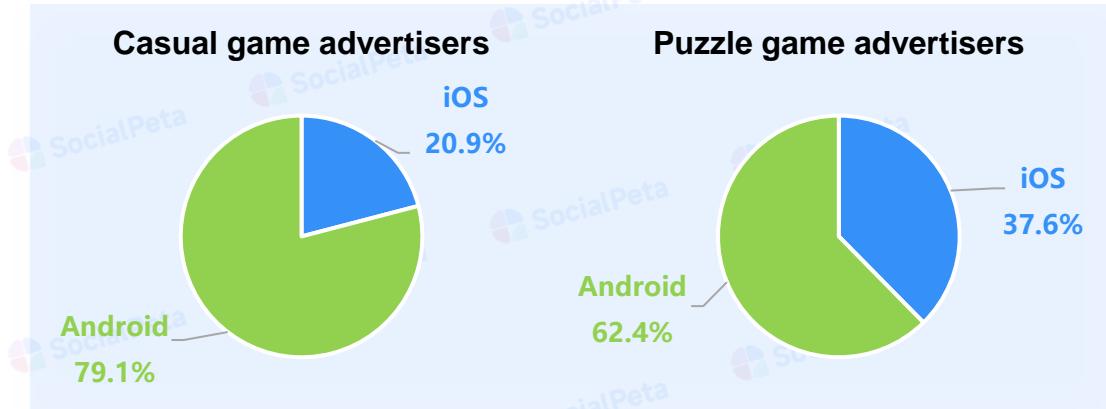
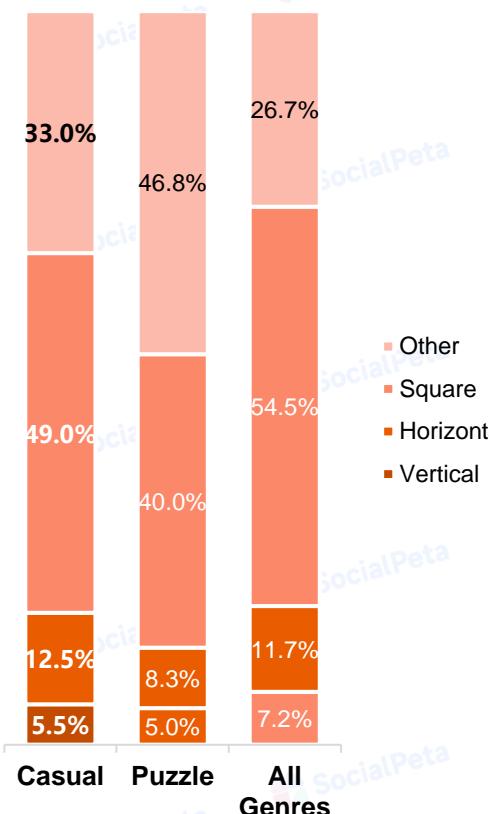
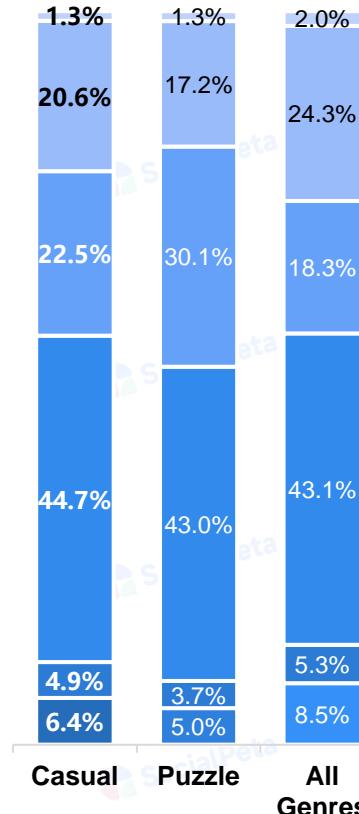




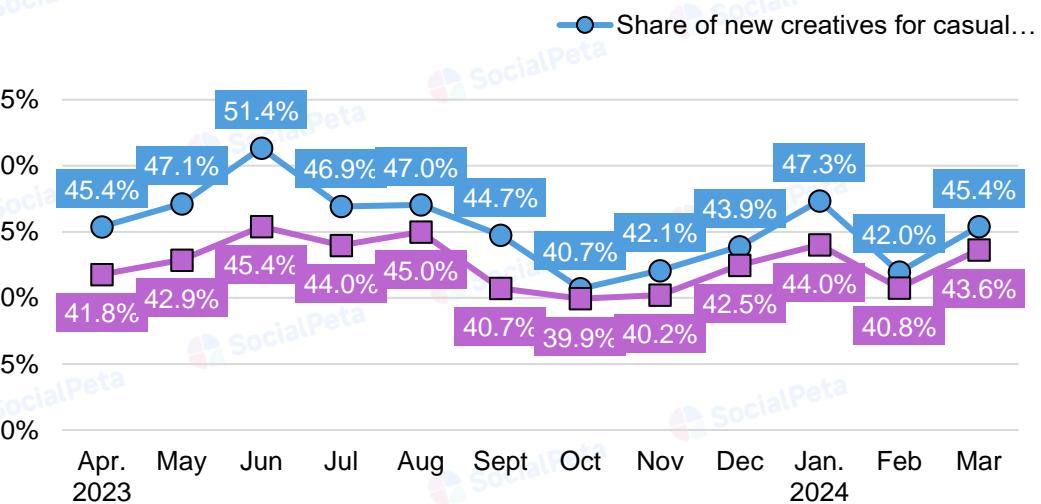
Observations about the Advertising of Casual & Puzzle Mobile Games in Q1 2024

Casual and puzzle games focused on ad creatives of 16-30s.

Casual game advertisers on Android accounted for nearly 80%.

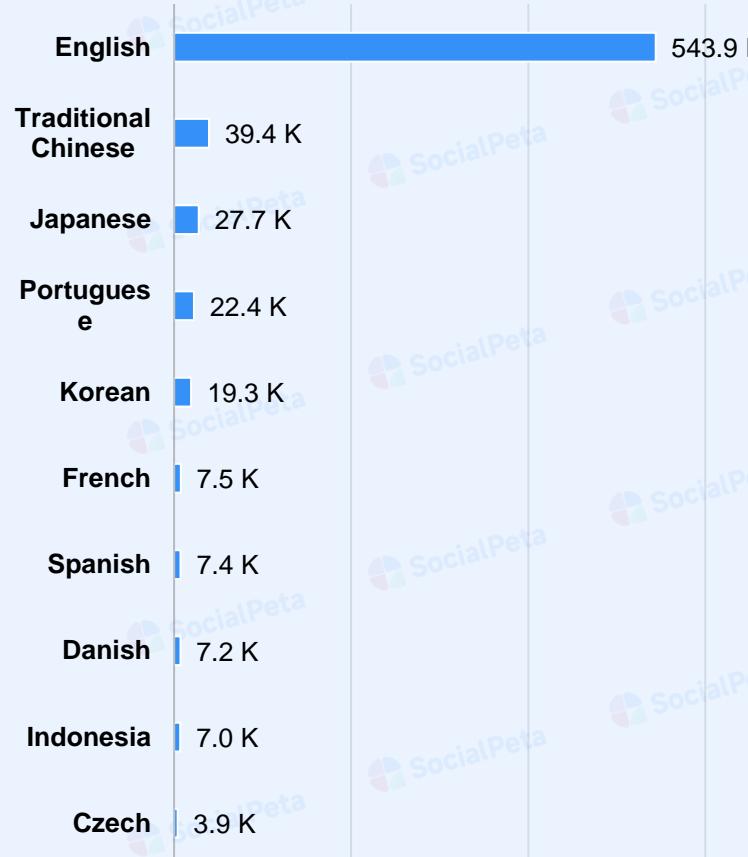


Observations about the advertising of casual & puzzle games in the last one year

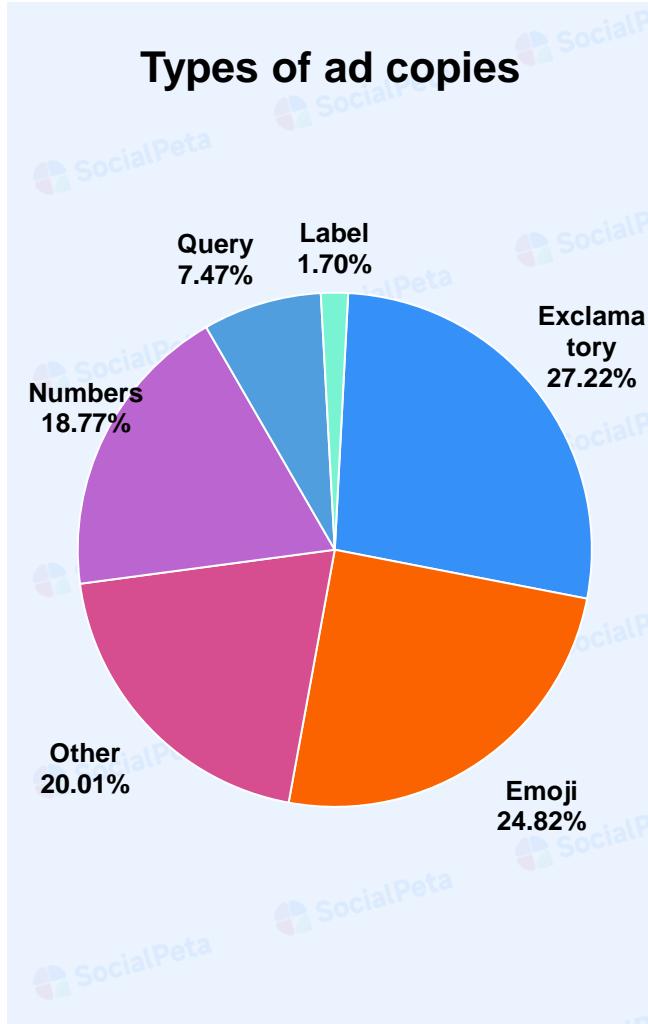


Observations about Ad Copies for Casual Games in Q1 2024

Top 10 ad copies by language



Types of ad copies

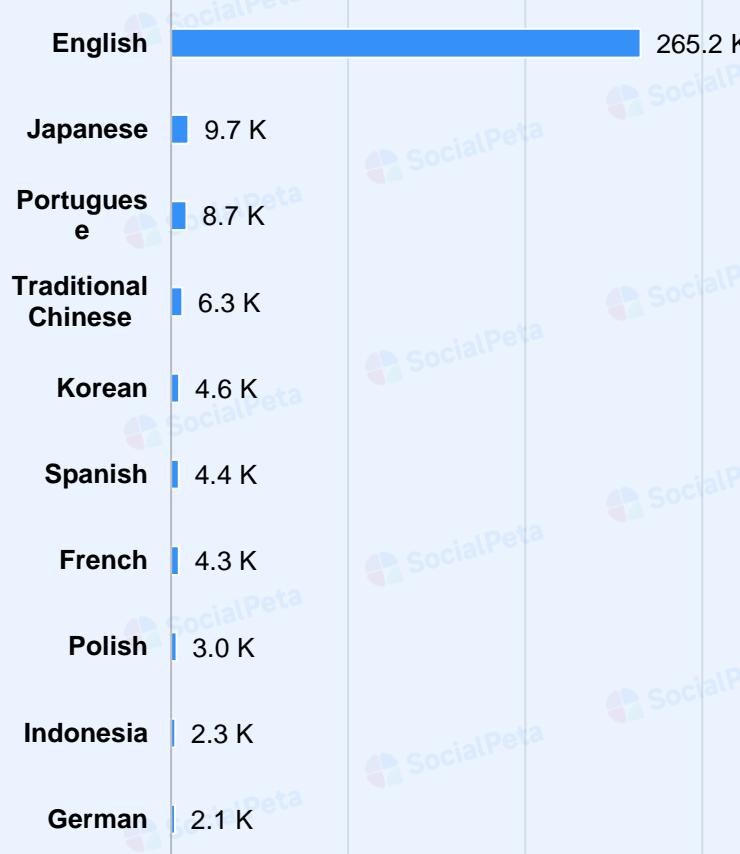


Examples of Popular Ad Copies

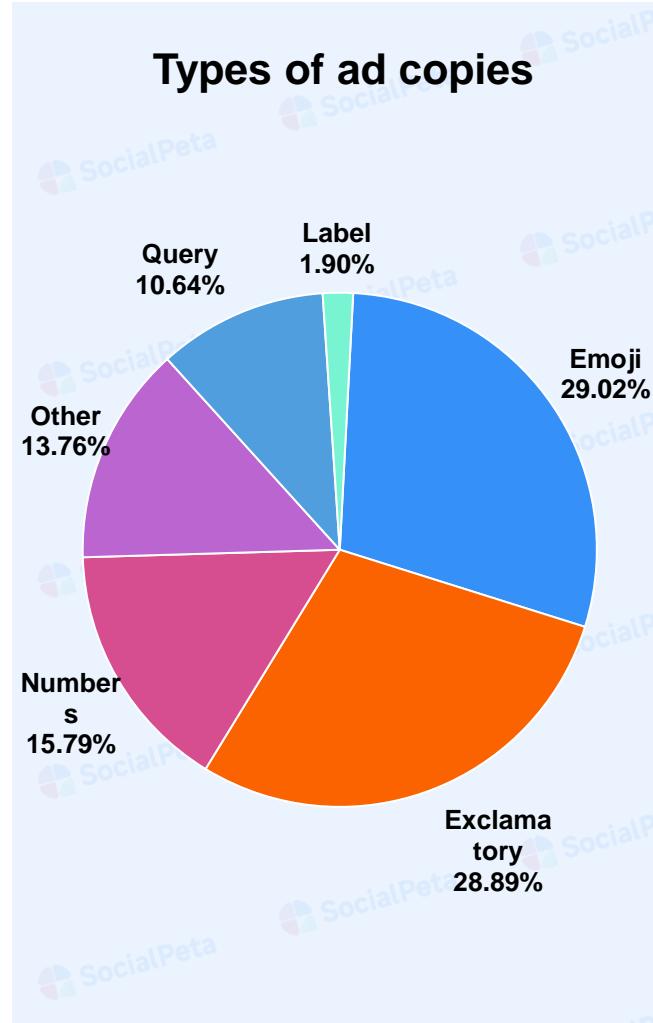
- Title: Try it yourself!
Text: What structure is your bridge?
- Title: Try it yourself! 🤘
Text: 🔥 Wild adventures are coming! 🤩 Will you accept the challenge?
- Title: Your family fav, re-imagined
Description: Play MONOPOLY GO! Free
- Title: Play Now For Free
Text: Easy to Learn, Hard to Master!
- Title: 今日開服
Text: 巨巨玩好玩的單機塔防小遊戲 🎮 ! 輕鬆解壓, 你能守住多少關 🤔 ?

Observations about Ad Copies for Puzzle Games in Q1 2024

Top 10 ad copies by language



Types of ad copies



Examples of Popular Ad Copies

- Title: ⭐ New Puzzle Game! ⭐
Text: Think You Can Do Better? 🤔 Make Sure You're Up to New Challenges! 😎
- Title: Play Now For Free
Text: Easy to Learn, Hard to Master!
- Title: Free to Play!
Text: New Sudoku Game
- Text: Love ❤️, betrayal 💔, addictive puzzles 🎖 and challenges 🎮.
Description: Solve puzzles with Alice and blast bubbles in this epic match-3 adventure
- Title: Challenging Puzzle Game
Text: Only 1% of people can do it. 🤯



03

Marketing Insights into Top Casual & Puzzle Game Advertisers



Build A Queen



Category: Runner
Developer: Polystation
Publisher: Supersonic from Unity

🏆 Top 10 in the Google Play Store worldwide
🏆 #1 in the Google Play Store in the US

Before

CPI \$0.30-\$0.40
Playtime 900s
Retention 27%

After

CPI \$0.35-\$0.40
Playtime 1900s
Retention 34%

Using big visual changes in creatives to raise marketability

Find top runner games' commonalities and add big visual changes on creatives.

Segmenting and optimizing for a target audience with female-focused creatives

Adding a female-focused and a fashion roleplay element to creatives, like princesses, mermaids, and nurses has led to notable improvements in marketability KPIs.

Tuning concept and art to match creatives

Using the female-oriented creative campaign as inspiration and incorporate beauty competition gameplay into the game.

Keeping it interesting with new meta layers and even more content

Adding meta layers game content such as base decoration, pet riding, a make-up mini-game, and a new challenging mechanic where levels rotate.





Camo Snipper



Category: Puzzle
Developer: 4S Games
Publisher: Supersonic from Unity

🏆 #8 on the Android US top download chart

Before

CPI < \$0.30
Playtime 400s

After

D0 Playtime 1197s
D1 Retention 41%

Leveraging strengths to address weaknesses, getting on the right track

Adding more game levels and the length of the levels leads to a steady rise in retention and playtime.

Enriching the game experience to further attract player engagement

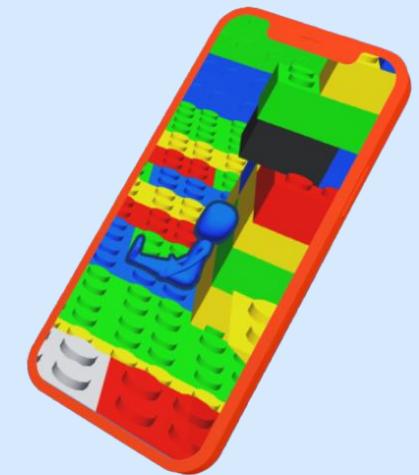
Developing an in-game currency for players to unlock rewards and power-ups, and establish an in-game store for players to purchase cosmetics.

Bringing in an expert, turning it to a hit

Focusing on the content and user experience, Supersonic's expert suggest adding more levels, extending the length and depth of existing levels, while also recommending to update controls and level-ending animations.

With everything in place, implementing IAA for monetization

Through continuous iteration of game content and optimization of user experience, 4S Games was able to implement ads and conduct A/B testing, which significantly increased the game's revenue, raising the ARPU by 32%.





Move People



Category: Puzzle
Developer: Pau Raubic
Publisher: Supersonic from Unity

🏆 Top 3 on iOS
🏆 Top 3 on Android

CPI \$0.30
D0 Playtime 1800s
D1 Retention 40%

From prototype testing to successful launch, full transparency

After prototype testing, Supersonic continuously provided feedback, suggested changes in creative, and reduced the CPI to \$0.35–\$0.40, while continuing efforts to lower the CPI.

Boosting game profits with A/B testing

Together with Supersonic to craft levels and conduct A/B testing on various game elements and monetization strategies:

- With each level, creating a progression bar to indicate how close the user is to solving the problem
- Adding a circle to each body part to indicate how close the user was to the target
- Changing the level order so easier levels occurred first
- A/B testing monetization, like bonus levels and interstitial timing



Still improving after launch

Keep enriching the game content and creative, add a narrative storyline to the game, and create more opportunities for monetization through rewarded videos and other ad placements.





An Example of Match-3 + X Games

[Royal Match] was the highest-grossing of all match-3 + X games and also one of the global Top 5 highest-grossing games in March 2024.

Royal Match

Match-3 + Decoration Dream Games

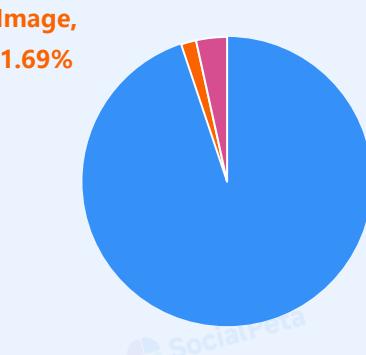


Advertising Data

First advertising date: July 2020

Total deduplicated creatives: 57.2K

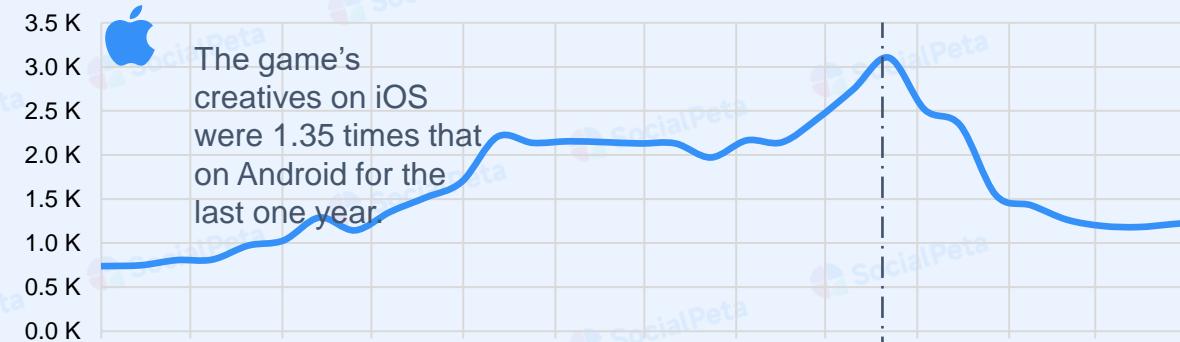
Percentages of Creatives by Type



Top 10 countries/regions by advertising



Observations about the game's advertising on iOS and Android in the last one year





Royal Match's Excellent Active Video Creative



Advertised on:  YouTube

Advertised in countries/regions: Australia

Features:

The game advertiser recently released many live-action ad creatives. The following ad creative blends advertising with an interview that is popular on short video platforms and about "What do you do for a living?". It naturally popularizes the game among the game's target player group.

3.7M

Estimated Impressions

17K

Estimated Conversions



Click to play the complete creative

A Classic Tile-Matching Game and also a Big Hit in Europe and the U.S.

The game released quite a lot of creatives, and topped the chart of global top games by advertising many times. And the game had remained one of the top 10 games by downloads in multiple countries for the last half year.

Block Blast!

A Tetris-like puzzle game Hungry Studio

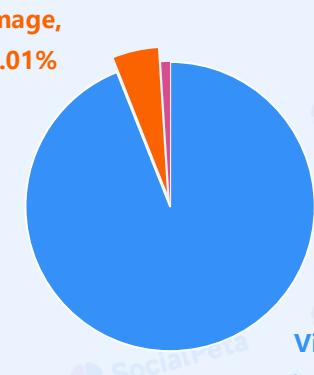


Advertising Data

First advertising date: April 2022

Total deduplicated creatives: 80.6K

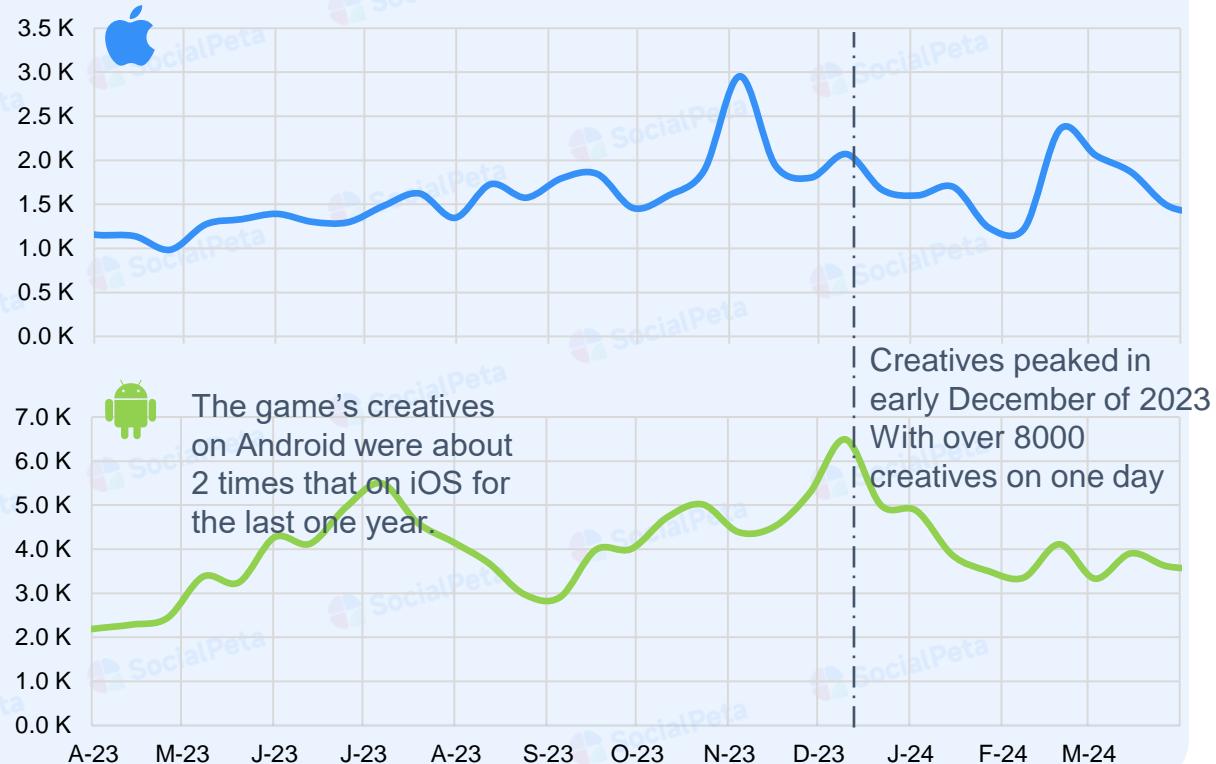
Percentages of Creatives by Type



Top 10 countries/regions by advertising



Observations about the game's advertising on iOS and Android in the last one year





Block Blast!'s Excellent Active Video Creative



Advertised on:  TikTok

Release date: 23 Jan., 2024

Features:

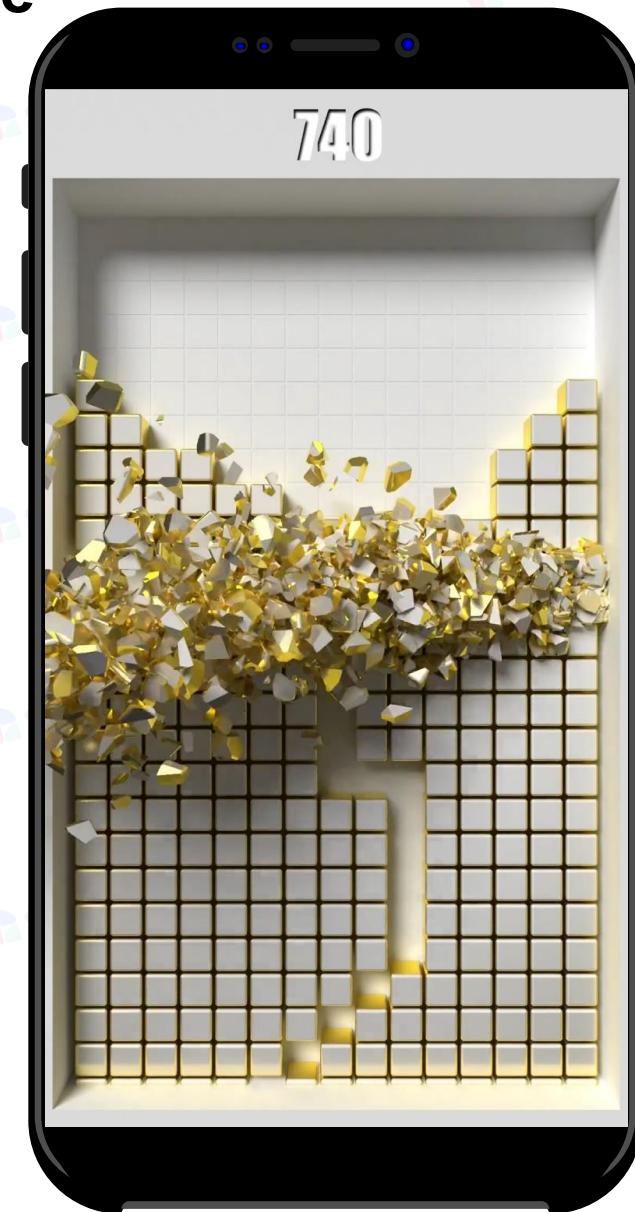
Handling creatives for classic casual games is the most challenging. While they typically showcase gameplay, the trick is how to add something to the creatives to convince people that the games are both exciting and innovative. Players may find this creative exciting because of its distinctive sound effects, a metallic ding followed by a kaboom.

75.8K

Estimated Impressions

2.4K

Estimated Conversions



A Hyper-Casual Puzzle Game Grossing Millions USD a Month

It's an old-theme game published by Rollic Games which has been polishing the "knot-untangling" gameplay for 4 years. Thanks to its simple gameplay and frequent updates, the game eventually made it to the list of Top 10 free games.

Twisted Tangle

A knot-untangling puzzle game Rollic Games

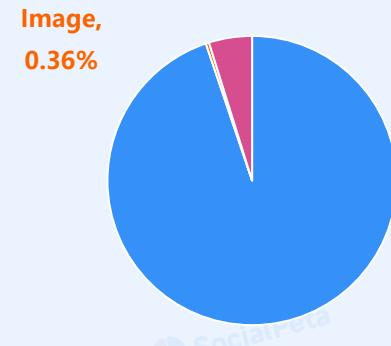
Advertising Data

First advertising date: April 2023

Total deduplicated creatives: 23.9K



Percentages of Creatives by Type



Top 10 countries/regions by advertising



Observations about the game's advertising on iOS and Android in the last one year





Twisted Tangle's Excellent Active Video Creative



Advertised on:  Google Ads

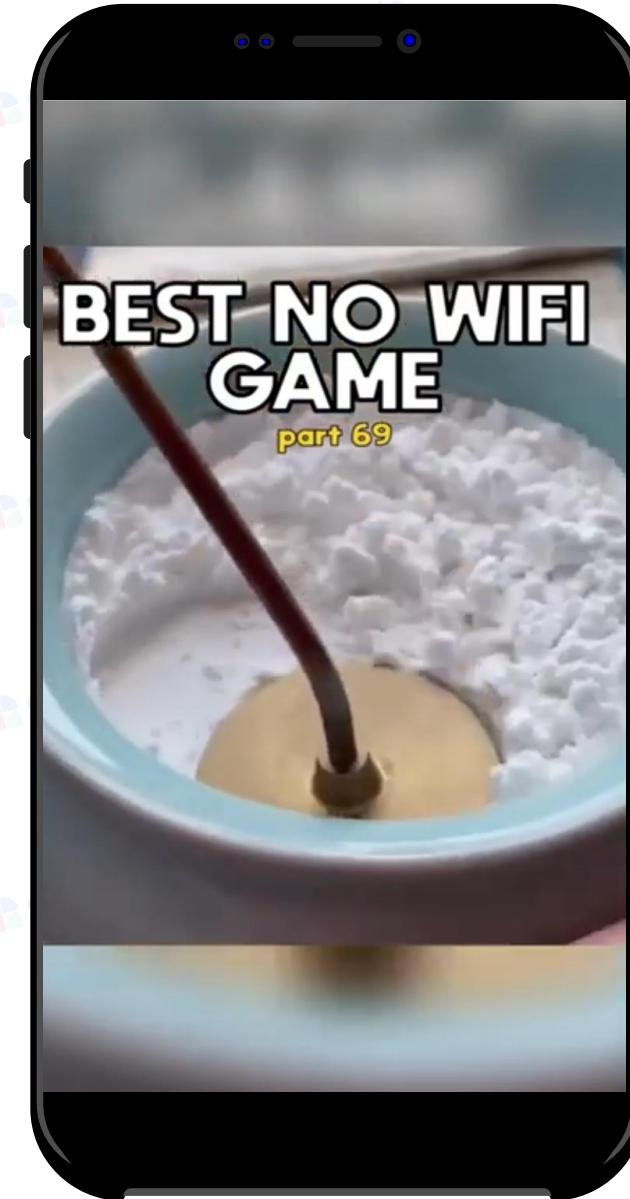
Duration: 203 days

Features:

Failing the game is also a common pattern in creatives for puzzle casual games. Losing in game makes the audience feel challenged and then download the game. And the creatives can also start with relaxing videos, challenging remarks, and videos of real people playing the game, which will make the creatives more effective.

1.6M
Estimated Impressions

950
Popularity





04

Great Time for Instant Games to Expand in Global Market (Special)



Going Global of Hot Instant Games



5,000+

Total deduplicated creatives for instant games going global

China's HK, Macao & TW, Japan & South Korea, Southeast Asia

The main markets for instant games going global

Hortor Games

The first-generation instant games in China

4399

The best instant game that has gone global

37Games

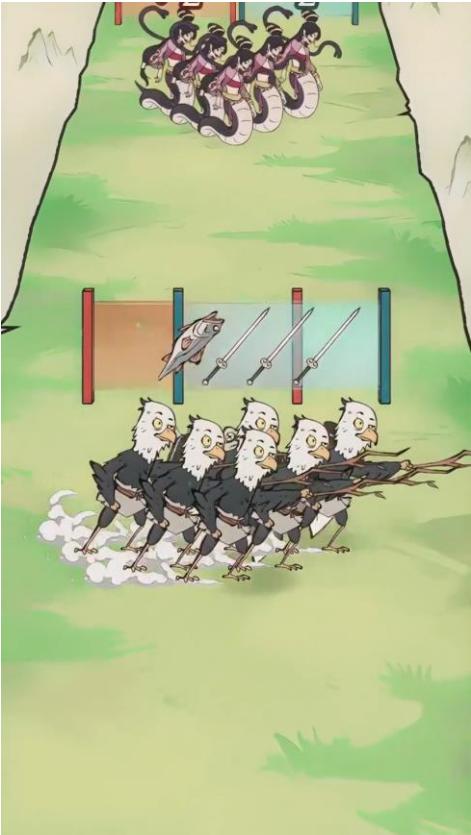
The most adequate supplies of hot instant games

Game Name	Local Instant Games	Gameplay	Company	Note
Legend of Mushroom	冒险大作战	Open boxes	4399	The game was first released in China's HK, Macao & TW, then its South Korean, Japanese, international, and Southeast Asian versions were released.
Oh My Dog	天空之森	Idle clicker	4399	4399 first released an instant game abroad as early as September 2023, which was well accepted in Southeast Asia.
小妖問道	寻道大千	Open boxes	37Games	The game dominated the chart of best-selling instant games in China and it stood out in the markets of China's HK, Macao & TW. Recently the game reported a growing number of users in Southeast Asia.
Doodle Magic	国王指意	Idle tower-defense	大梦龙途	The game's Chinese and international versions were released almost the same time. 大梦龙途 was mainly responsible for the publishing of its app and global version.
暴走小蝦米	行侠仗义五千年	Roguelike	大梦龙途	A classic vampire roguelike. It was released first as an app, later released as an instant game in China in order to reach to more people.
ぽちゃガチョ!	肥鹅健身房	Business Simulation	Qingci Games	The game was developed by 豪腾嘉科 and its global version was published by Qingci Games. It was one of the early hit games.
超雞小隊	小鸡舰队出击	Idle Shooter	北京爱普雷	An instant game with a unique gameplay, representing the beginning of the sub-industry of "Chickenlike".

Ad Creatives of some hot instant games in China's HK, Macao & TW

Ad creatives for instant games in China's HK, Macao & TW share a lot in common with the hot ones in China's mainland. Some of the high-quality creatives in China's mainland can be directly released in those regions.

Parkour-based instant games



Game Walkthrough Advertising



Battles in Game



Click to play the complete creative



Ad Creatives of some hot instant games in Japan and South Korea

In Japan and South Korea, the ad creatives obviously tried much harder to satisfy the local taste, especially when advertising in Japan. KOL advertising is a great marketing strategy to enter the market.

KOL Playing the Game



Screwball Comedy



Sexual Teasing



Click to play the complete creative



Ad Creatives of some hot instant games in Southeast Asia

In Southeast Asia, there are many great local marketing teams who integrate hot online topics into their ad creatives to have a growing user base, because they know a large proportion of gamers are young.

Live-Action Drama



Viral Images



In-kind Rewards



Click to play the complete creative



Declaration

1. Data Sources

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

2. Data Cycle and Indicators

Overall date range of the report: Jan - Mar 2024

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

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5. Concerned Countries and Regions (based on the distribution area of SocialPeta's products, not the actual geographical distribution)

North America: USA, Canada, Mexico, Panama

Europe: Turkey, France, Germany, United Kingdom, Italy, Spain, Netherlands, Norway, Poland, Portugal, Belgium, Switzerland, Austria, Romania, Sweden, Greece, Denmark, Luxembourg, Ireland, Finland

JP & ROK: Japan, South Korea

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

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

Oceania: Australia, New Zealand

South Asia: India, Pakistan

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

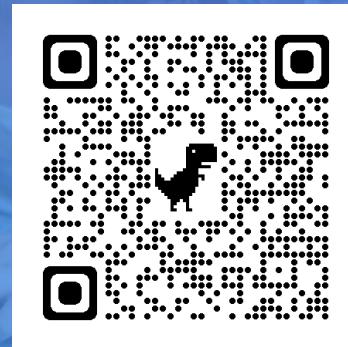
South America: Brazil, Chile, Argentina, Colombia, Peru, Venezuela, Paraguay

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



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