

2026 Global Mobile Gaming Marketing Trends White Paper

Insights Based on 2025 Global Data

Produced by SocialPeta x Singular x Aarki

Special Invitation:  funtapgames



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 80 well-known ad channels worldwide, such as Facebook, Twitter, YouTube, TikTok, and Unity. We provide nearly 1.7 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

1.7B

APP Ad Creatives

1.20M

Daily Updates

Website: www.socialpeta.com



Singular is the #1-rated MMP on G2 and the only platform that **unifies your spend, attribution, ROI, and performance into one clear view.** With AI-powered tools like Creative IQ and MCP integrations, marketers go from insight to impact in minutes—no engineering required. Trusted by top brands like Nike, Airbnb, Rovio and LinkedIn, Singular helps you **move fast, eliminate waste, and grow smarter.**

#1 rated

Singular has consistently been the #1 user-rated marketing attribution company on G2.

Billions

of app installs are attributed annually through the Singular platform.

1,000+

of the fastest growing apps trust Singular for as their source of truth for marketin performance.

Website: www.singular.net



Aarki is an **AI-powered mobile performance platform** that helps app publishers **acquire and retain high-value users** through deep neural network-powered models and AI-powered creative production. Built on supervised AI and privacy-safe technology, Aarki operates four owned-and-operated data centers listening to the world's ad calls, processing 6M+ queries per second across mobile and CTV.

Global on-ground presence with offices in San Francisco, New York, London, Bangalore, Beijing, Manila, and Seoul. Aarki serves leading mobile publishers including Zynga, ByteDance, and Rovio.

Founded 2010. Headquartered in San Francisco. Learn more at aarki.com.

220B

auctions per day

6.5B

unique users

10B

devices

6M

mobile ad requests/second

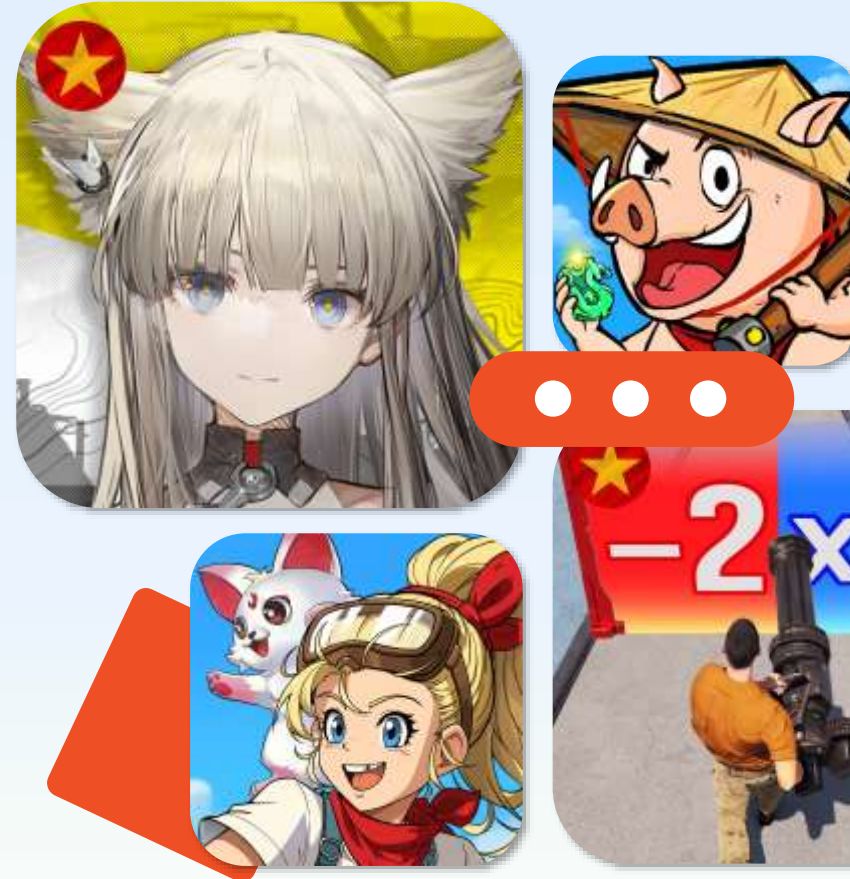
Website: www.aarki.com

About

Funtap Company Introduction:

Funtap Games is one of Southeast Asia's leading mobile game publishers, with over a decade of experience and the **largest number of publishing licenses in Vietnam**. The company is currently a **market leader in SLG games** in the local market.

Funtap co-publishes a strong portfolio of global titles, including Genshin Impact, Mobile Legends: Bang Bang, Arknights: Endfield, Last War: Survival, Top Heroes, Dark War: Survival, and MU: Across Time,... working with more than **150 global partners** and reaching **9.4 million monthly active users**.



320

GAMES PUBLISHED

150

GLOBAL PARTNERS

+29M

DOWNLOADS ANNUALLY

Website: corp.funtap.vn

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01

Global Mobile Gaming Marketing Trend Insights

Advertising Trends in Global Mobile Games in 2025

There were over 90K active mobile game advertisers in June 2025, with nearly 8K new game advertisers per month on average.

- There were over 84K mobile game advertisers per month in 2025, up 21.9% YoY. The number peaked at over 90K in June. The total number of mobile game advertisers for the year exceeded 400K.
- Nearly 8K new mobile game advertisers joined each month, accounting for an average of 9.4% (over 10% in Sept., Oct., and Dec.) of monthly advertisers. New advertisers accounted for 23.4% of all advertisers this year, almost the same as last year.

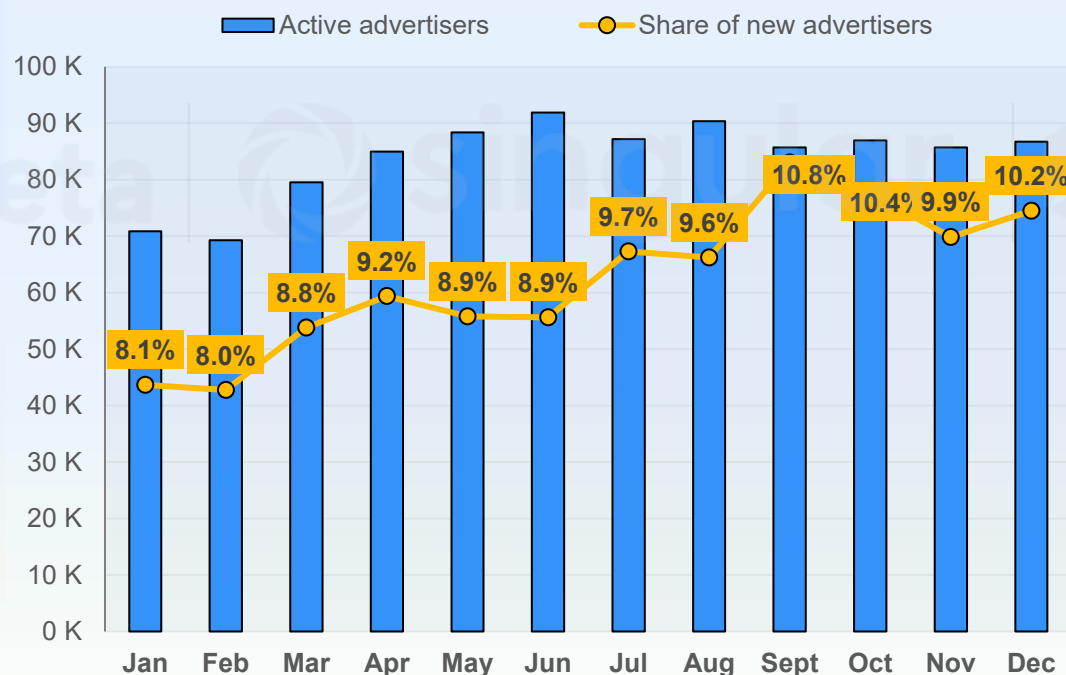
Active advertisers per month in 2025

84.0K YoY **21.9%↑**

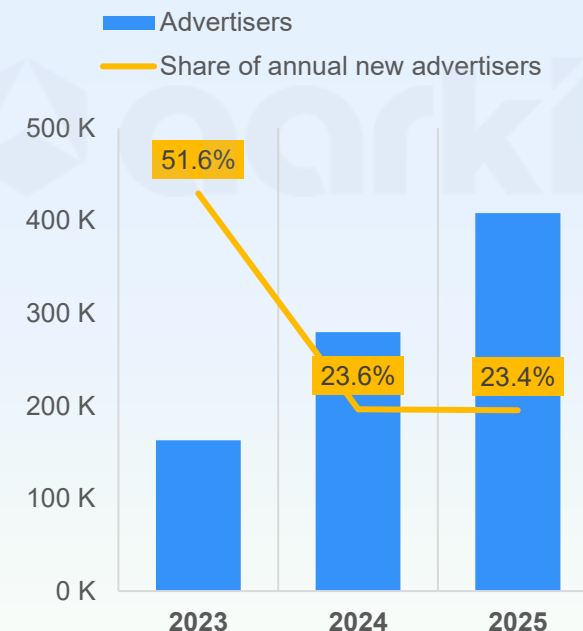
Share of new advertisers per month in 2025

9.4% New advertisers per month: **7.9K**

Monthly Trends of Global Mobile Game Advertisers in 2025



Trends of Mobile Game Advertisers in the Past 3 Years



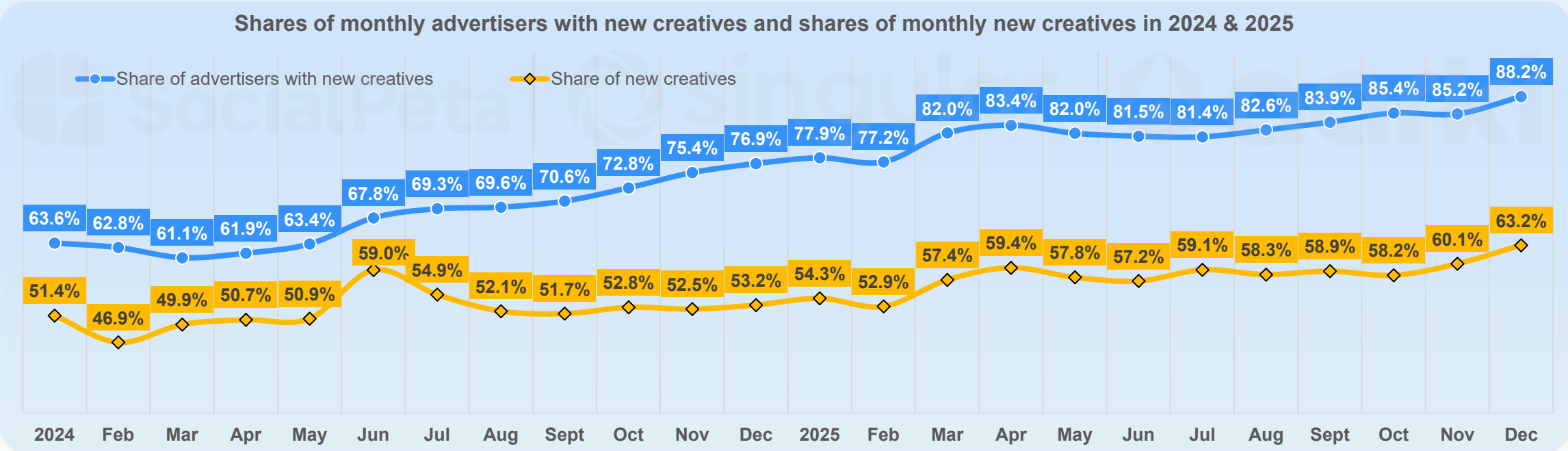
Trends in New Ad Creatives for Global Mobile Games in 2025

There were over 80% of monthly advertisers that released new creatives. New creatives accounted for over 60% in November.

- 2025 recorded an average of over 82% of monthly advertisers that released new creatives, an increase of 14.6% compared to the same period last year. The share of advertisers with new creatives rose steadily to peak at 88.2% in December.
- New creatives' share of monthly creatives kept increasing to surpass 60% in November and peaked at 63.2% in December. In 2025, new creatives accounted for an average of 58.1% per month, an increase of 5.9% from last year.

82.5% YoY: 14.6%↑
Share of monthly advertisers with new creatives in 2025

58.1% YoY: 5.9%↑
Share of new creatives per month in 2025

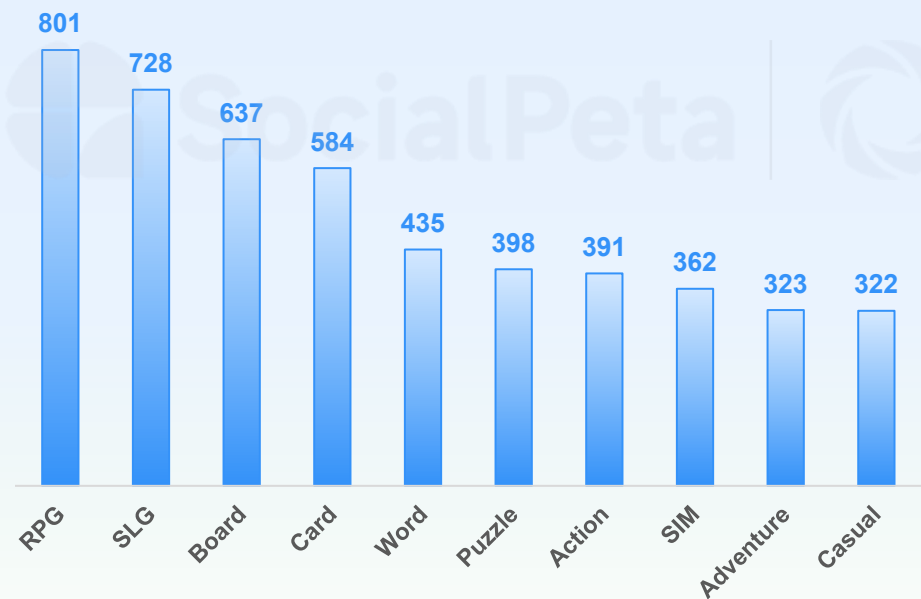


Advertising Analysis of Global Mobile Games by Genre in 2025

Casino Games See a Significant Increase in Marketing Share; RPG Titles Average Over 800 Creatives in 2025

- In 2025, RPG games led ad spending with over 800 creatives per title annually, followed by strategy games at 728. The casino/entertainment category surged, with advertiser share rising to 47% and creative share to 22.3%, showing strong year-over-year growth.

Monthly creatives by game genre in 2025



Genre	Share of advertisers	YoY Change	Genre	Share of creatives	YoY Change
Casino	47.0%	22.7%	Casual	23.9%	-5.6%
Casual	19.9%	-5.9%	Casino	22.3%	13.9%
Puzzle	8.0%	-3.1%	Puzzle	11.9%	0.3%
SIM	4.5%	-2.5%	RPG	9.5%	-2.9%
RPG	3.2%	-1.8%	SLG	6.7%	-0.2%
Action	3.0%	-2.5%	SIM	6.0%	-1.6%
SLG	2.5%	-1.3%	Action	4.4%	-1.4%
Arcade	2.4%	-0.3%	Card	3.2%	-0.5%
Adventure	2.0%	-1.1%	Board	3.0%	0.3%
Card	1.5%	-0.9%	Adventure	2.4%	-1.0%

Marketing Analysis of Mobile Games in Top Regions in 2025

Europe was the only region that had over 40K monthly advertisers this year. Hong Kong, Macao, and Taiwan topped all regions in monthly creatives, followed by North America and Oceania.

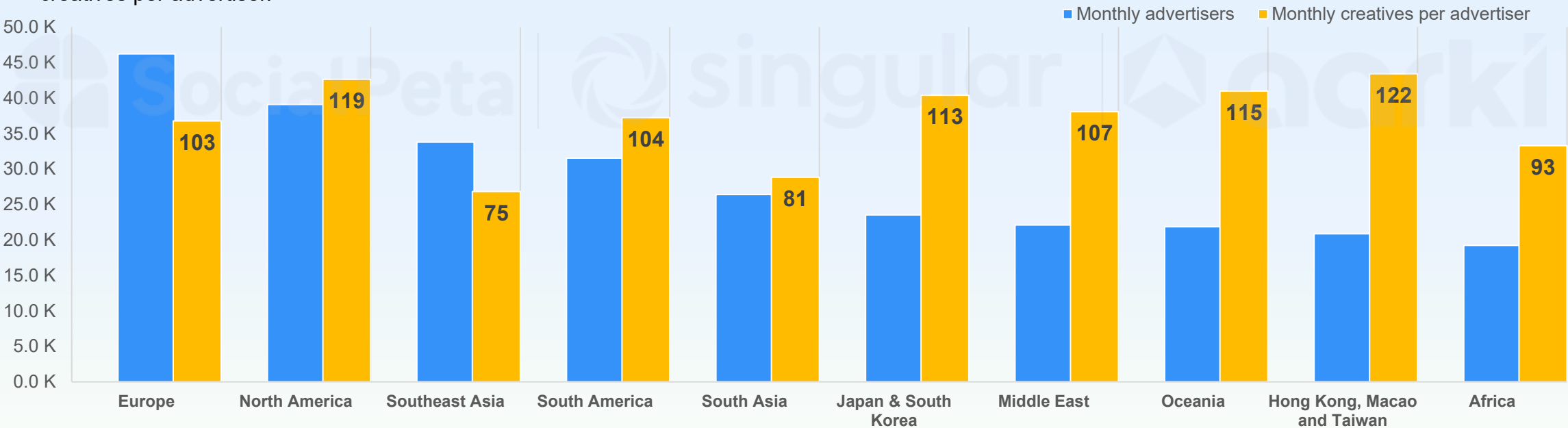
- Europe had over 46K monthly advertisers in 2025, over 6K higher than that in North America which came in second. Europe was the only one that had over 40K monthly advertisers. Southeast Asia and South America had over 30K monthly advertisers.
- Hong Kong, Macao, and Taiwan recorded 122 monthly creatives per advertiser, forming the fiercest marketing competition in 2025. It was immediately followed by North America with 119 monthly creatives per advertiser. Oceania and Japan & South Korea also had over 110 monthly creatives per advertiser.

Most monthly advertisers:

46.2K in Europe

Most monthly creatives per advertiser:

122 in Hong Kong, Macao, and Taiwan

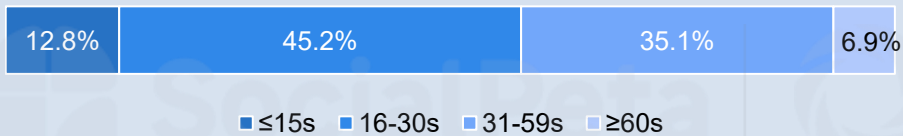


Types of Ad Creatives for Global Mobile Games in 2025

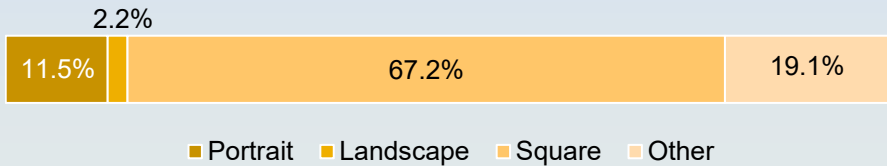
In 2025, video creatives accounted for 74.1%, up 14.2% YoY. Square images made up the largest share of image creatives at 67.2%.

- Video creatives surged to 74.1% this year, up 14.2% YoY. Video creatives under 30s accounted for 58%, and those over 60s for 6.9%.
- Image creatives made up 24.7%, down 11.6% YoY. Square image creatives accounted for 67.2% of all image creatives.

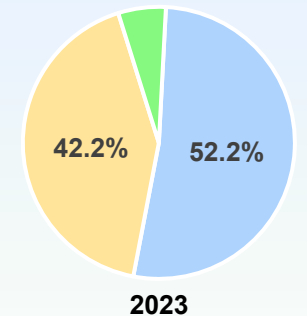
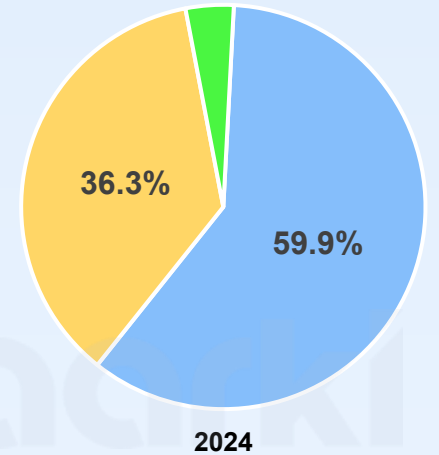
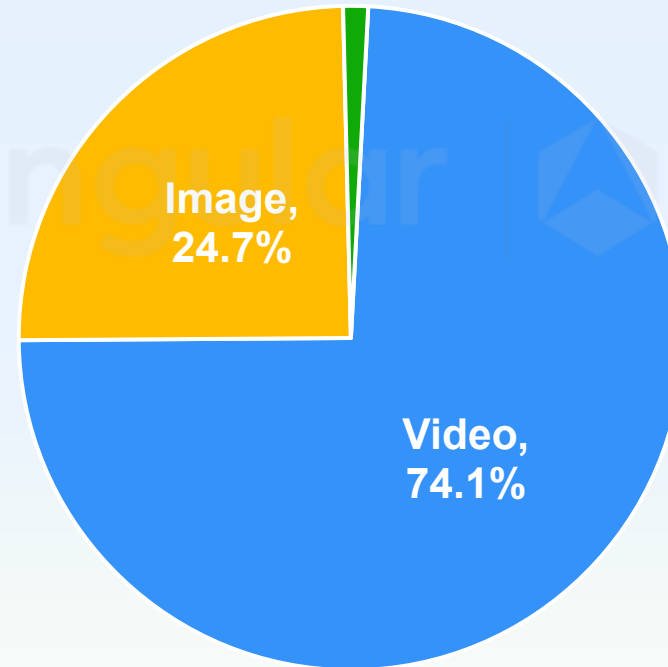
1 Share of video creatives by length



2 Share of image creatives by format



Share of creatives by type for global mobile games in 2025

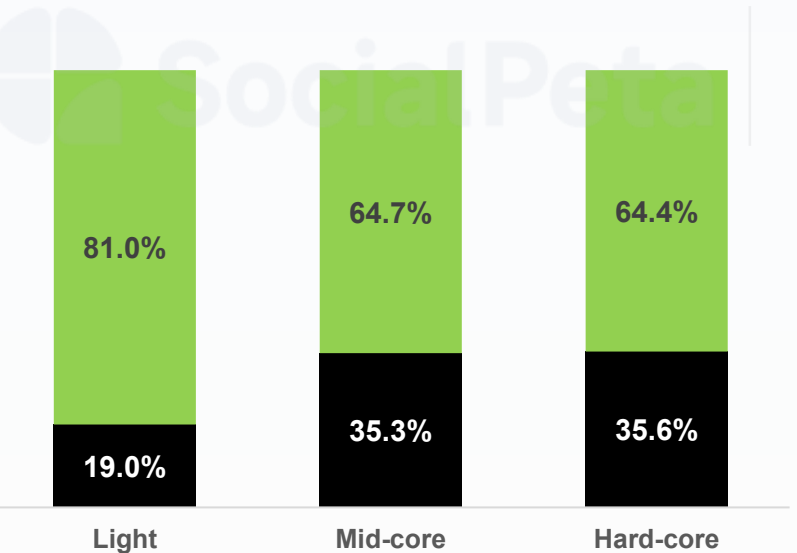


Shares of Global Mobile Game Advertisers on iOS & Android in 2025

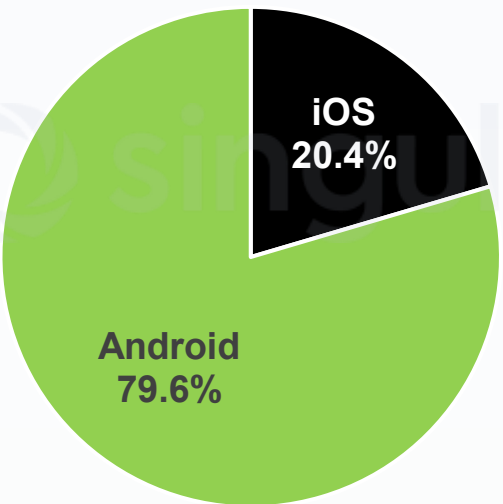
In 2025, advertisers on Android accounted for nearly 80%. For Mid-core and hard-core games, advertisers on iOS accounted for around 35%.

Shares of mobile game advertisers on iOS and Android

iOS advertisers made up about 35% in mid-core and hard-core games.
Android advertisers accounted for over 81% in light games.

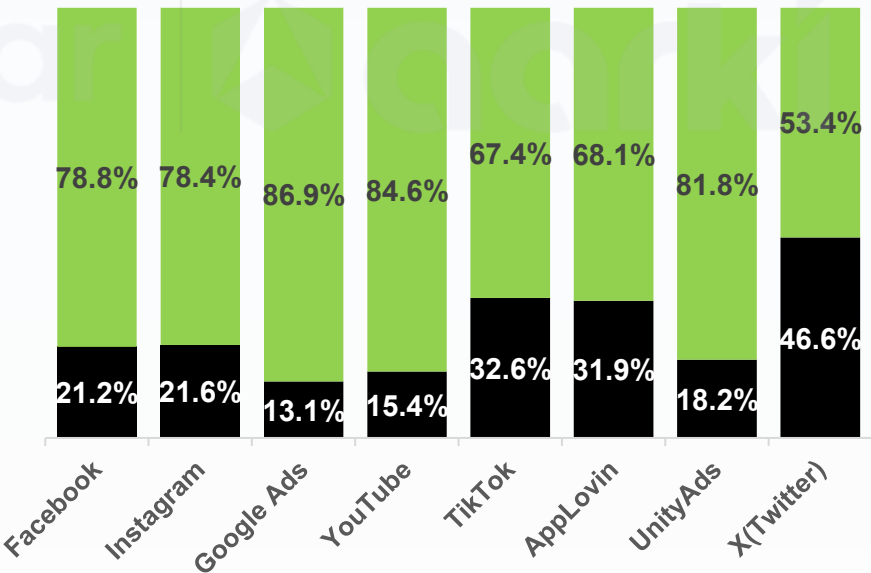


Shares of mobile game advertisers on iOS and Android



Share of iOS and Android Creatives on Major Platforms

On Meta's platforms, iOS creatives accounted for around 21%. On X (formerly Twitter), iOS creatives accounted for as high as 46.6%.

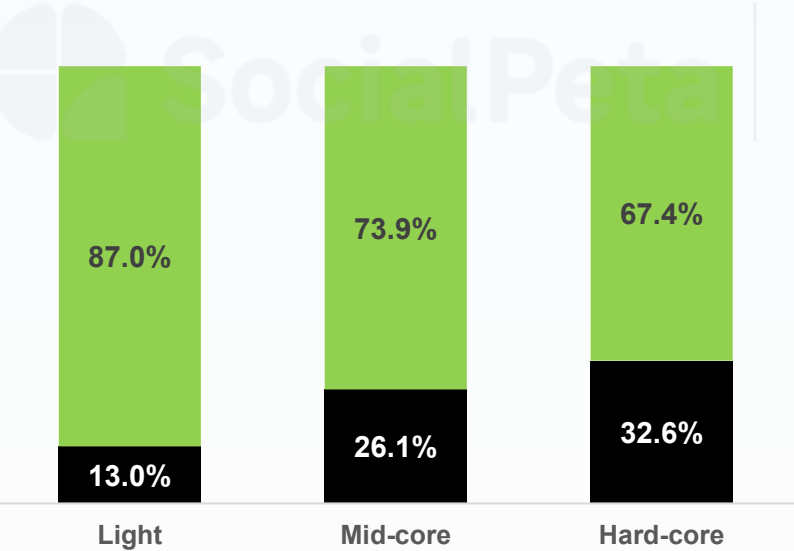


Shares of Creatives for Mobile Games on Android and iOS in 2025

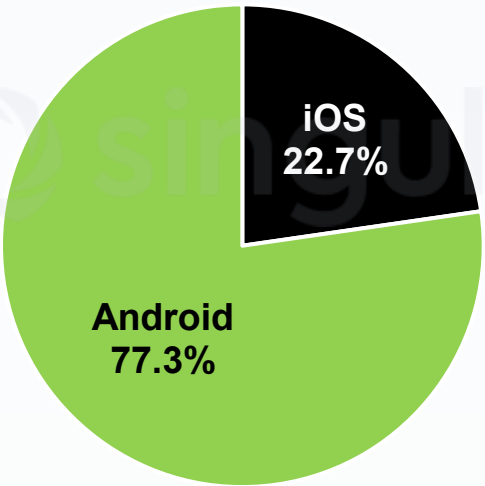
Games with more hardcore gameplay had higher shares of creatives on iOS. However, across most major platforms, Android creatives still account for over 70%.

Shares of Creatives for Mobile Games on Android and iOS

Games with more hardcore gameplay had higher shares of creatives on iOS.
Hard-core games had over 32% of the creatives on iOS.

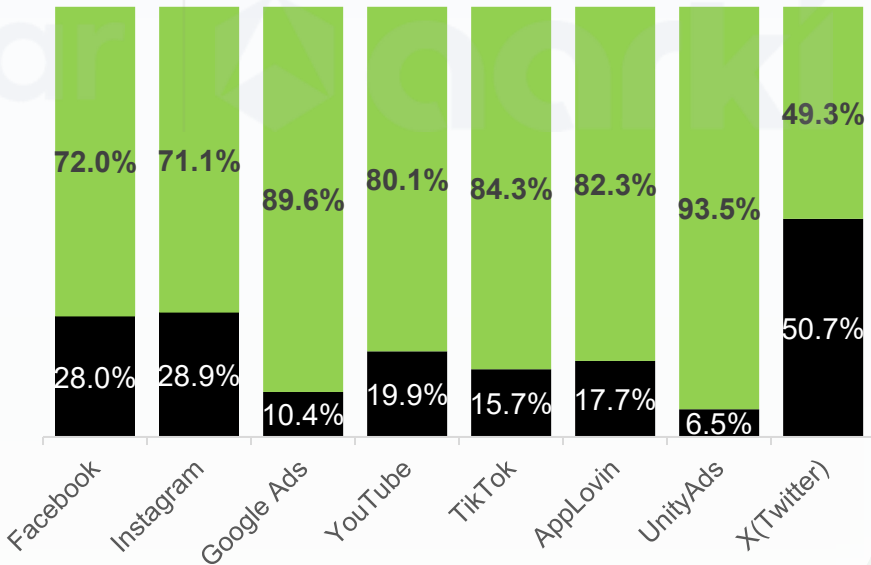


Shares of Creatives for Mobile Games on Android and iOS



Share of iOS and Android Creatives on Major Platforms































On Meta's platforms, iOS creatives accounted for around 28%.
On UnityAds, Android creatives accounted for as high as 93.5%.



02

2025 Global Mobile Game Top Charts & Rankings

Top 30 Games by Advertising on iOS in 2025

1		Vita Mahjong Vita Studio.	Casual	11		Paint by Number Coloring Games Oakever Games	Puzzle	21		Braindom Lahana Games	Puzzle
2		Block Blast! Hungry Studio	Casual	12		Mafia City Phantix Games	SLG	22		Rise of Kingdoms Lilith Games	SLG
3		Last War: Survival FUNFLY PTE. LTD.	SLG	13		Mahjong Wonders™ Nebula Studio	Casual	23		Evony TOP GAMES	SLG
4		Jigsawscapes® Oakever Games	Puzzle	14		Wuthering Waves KURO Games	RPG	24		Idle Office Tycoon Warrior Games	SIM
5		Zen Word® Oakever Games	Puzzle	15		Kingshot Century Games Pte. Ltd	SLG	25		Emblem Assemble: Neo ONG KONG LOME TRADING	RPG
6		Zen Color Oakever Games	Puzzle	16		The Grand Mafia KURO Games	SLG	26		Top War RiverGame	SLG
7		Tile Explorer Oakever Games	Casual	17		Coin Master Moon Active	Adventure	27		Solitaire Clash Aviagames	Card
8		Lands of Jail SINGAPORE JUST GAME TECHNOLOGY PTE. LTD	SLG	18		Archer0 2 HABBY	Action	28		Bingo Voyage VERTEX GAMES	Casino
9		Whiteout Survival Century Games Pte. Ltd	SLG	19		Travel Town Moon Active	Board	29		MapleStory : Idle RPG NEXON	RPG
10		MONOPOLY GO! Scopely	Board	20		Block Crush! Wonderful Studio	Puzzle	30		Bible Word Puzzle Oakever Games	Word


Top 20 Games by Download and Revenue on APP Store in 2025




Download

































Revenue

1		Block Blast!	Hungry Studio	11		Goods Puzzle: Sort Challenge	ONESOFT
2		Roblox	Roblox	12		Royal Kingdom	Dream Games
3		Subway Surfers	Sybo Games	13		8 Ball Pool™	Miniclip
4		Township	Playrix	14		Pizza Ready	Supercent
5		Clash Royale	Supercell	15		Among Us!	InnerSloth
6		Color Block Jam	Rollic Games	16		Candy Crush Saga	King
7		Last War: Survival	FUNFLY	17		Free Fire	Garena
8		Magic Tiles 3	Amanotes	18		Royal Match	Dream Games
9		Vita Mahjong	Vita Studio	19		Gardenscapes	Playrix
10		Whiteout Survival	Century Games	20		Hole.io	Voodoo

1		Royal Match	Dream Games	11		Pokémon GO	Niantic
2		Last War: Survival	FUNFLY	12		Gardenscapes	Playrix
3		MONOPOLY GO!	Scopely	13		Kingshot	Century Games
4		Candy Crush Saga	King	14		PUBG MOBILE	Level infinite
5		Whiteout Survival	Century Games	15		eFootball™	KONAMI
6		Pokémon TCG Pocket	Pokemon	16		Clash of Clans	Supercell
7		Clash Royale	Supercell	17		Call of Duty®: Mobile	Level infinite
8		Gossip Harbor®	Microfun Limited	18		Toon Blast	Peak Games
9		Township	Playrix	19		Royal Kingdom	Dream Games
10		Coin Master	Moon Active	20		Brawl Stars	Supercell

Top 30 Games by Advertising on Android in 2025

1		Vita Mahjong Vita Studio.	Board
2		Tile Explorer Oakever Games	Casual
3		Jigsawscapes® Oakever Games	Puzzle
4		Block Blast! Hungry Studio	Casual
5		Zen Word® Oakever Games	Puzzle
6		Lands of Jail SINGAPORE JUST GAME TECHNOLOGY PTE. LTD	SLG
7		Zen Color Oakever Games	Puzzle
8		Paint by Number Oakever Games	Puzzle
9		The Grand Mafia KURO Games	SLG
10		Dark War Survival Florere Game	SLG
11		Whiteout Survival Century Games Pte. Ltd	SLG
12		Last War: Survival FUNFLY PTE. LTD.	SLG
13		MONOPOLY GO! Scopely	Board
14		Evony TOP GAMES	SLG
15		Lords Mobile IGG	SLG
16		Mahjong Wonders™ Nebula Studio	Casual
17		Bible Word Puzzle Oakever Games	Word
18		PUBG MOBILE Level ifinite	Action
19		Doomsday IGG	SLG
20		Last Z: Survival Florere Game	SLG
21		Total Battle: StrategyGames Scorewarrior	SLG
22		Tiles Survive! FunPlus	SLG
23		Coin Master Moon Active	Adventure
24		Sudoku Oakever Games	Puzzle
25		Mystery Town Cedar Games	Puzzle
26		Block Crush! Wonderful Studio	Puzzle
27		Hero Wars: Alliance NEXTERS	RPG
28		Mobile Legends: Bang Bang MOONTON	Action
29		Kingshot Century Games Pte. Lt	SLG
30		Braindom Lahana Games	Puzzle

Top 20 Games by Download and Revenue on Google Play in 2025










































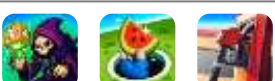
Download



Revenue

Download					Revenue				
1		Roblox	Roblox		11		Tile Explorer	Oakever Games	
2		Block Blast!	Hungry Studio		12		Extreme Car Driving Simulator	AxesInMotion Racing	
3		Ludo King	Gametion		13		Snake Calsh	Supercent	
4		Subway Surfers	SYBO Games		14		Mini Games: Brainrot Challenge	Unicorn Studio Official	
5		Pizza Ready	Supercent		15		8 Ball Pool	Miniclip	
6		Free Fire MAX	Garena		16		Candy Crush Saga	King	
7		Free Fire	Garena		17		Tile Club	Gamo Vation	
8		Hole.io	VOODOO		18		Subway Princess Runner	IVY	
9		Vita Mahjong	Vita Studio.		19		Football League	MOBILE SOCCER	
10		My Talking Tom 2	Outfit7 Limited		20		Moto Race Go	XGAME STUDIO	
1		Last War: Survival Game	FUNFLY		11		Gardenscapes	Playrix	
2		Roblox	Roblox		12		Free Fire	Garena	
3		MONOPOLY GO!	Scopely		13		Last Z: Survival Shooter	Florere Game	
4		Coin Master	Moon Active		14		Township	Playrix	
5		Royal Match	Dream Games		15		Kingshot	Century Games	
6		Whiteout Survival	Century Games		16		리니지M	NCSOFT	
7		Candy Crush Saga	King		17		eFootball™	KONAMI	
8		Gossip Harbor®	Microfun Limited		18		PUBG MOBILE	Level infinite	
9		Pokémon GO	Niantic		19		Brawl Stars	Supercell	
10		Pokémon TCG Pocket	Pokemon		20		Fishdom	Playrix	

TOP20 Global Mobile Game Investment Companies In 2025

#	Company Name	Number of Advertised Games	Mainly Advertised Games	#	Company Name	Number of Advertised Games	Mainly Advertised Games
1	Learnings	 44		11	EWORLD	 10	
2	Bingchuan Network	 72		12	Bole Games	 17	
3	FunPlus	 46		13	VOODOO	 232	
4	Yotta Games	 21		14	Guru Puzzle Game	 42	
5	LoveColoring Game	 23		15	CASUAL AZUR GAMES	 197	
6	Hungry Studio	 14		16	JunHai Games	 33	
7	Rollic Games	 160		17	VERTEX GAMES PTE. LTD.	 6	
8	Florere Game	 4		18	Supercent	 139	
9	IGG	 33		19	Leniu Game	 16	
10	Level Infinite	 89		20	HOMA	 70	

03

Gaming User Acquisition In 2025: What Actually Changed

Gaming User Acquisition in 2025: What Actually Changed.

From volatility to discipline

By 2025, mobile gaming user acquisition finally stopped feeling like a constant state of emergency.

After years of disruption driven by privacy changes, macroeconomic pressure, and spiraling acquisition costs, the market began to settle. That did not mean a return to the old playbook. Instead, gaming marketers adapted. They became more deliberate about how they spent, how they tested, and how they measured success.

The result was a year defined less by volatility and more by discipline.

Global gaming ad spend ticked up modestly over the course of the year. It was not explosive growth, but it was meaningful. Across 2025, gaming ad spend grew in the low single digit range year over year, signaling renewed confidence without the excess that defined earlier cycles. Rather than chasing scale for its own sake, marketers focused on extracting sustainable value from every incremental dollar.



Gaming User Acquisition in 2025: What Actually Changed.

Growth returned, but quietly and unevenly

That discipline showed up clearly in how the year unfolded.

Q1 started cautiously. Gaming install volumes declined modestly quarter over quarter in early 2025, as many teams prioritized efficiency, testing, and learning agendas over aggressive expansion. As performance stabilized in Q2, budgets began to loosen, even as installs remained slightly below Q1 levels, down mid single digits quarter over quarter.

Momentum built through Q3, supported by live operations, content updates, and steady creative refreshes. Gaming installs rebounded meaningfully in Q3, with several high volume genres posting high single digit to low double digit quarter over quarter growth.

By Q4, growth accelerated in earnest. Competition intensified during the holiday period, but something notable happened. For advertisers with mature creative pipelines and clear measurement frameworks, increased spend did not erode performance. In many cases, it improved it. Despite higher auction pressure, many gaming advertisers maintained stable or slightly improved ROAS compared to Q3, a clear departure from historical peak season patterns.

That marked a real shift from prior years, when scaling into peak periods often meant sacrificing returns.

2025 mobile gaming momentum: slow start, strong finish.



Gaming User Acquisition in 2025: What Actually Changed.

Scale and monetization continued to diverge by genre

At the genre level, familiar patterns held. Casual and hybrid casual games continued to dominate install volume throughout 2025, while mid core and strategy titles remained the primary revenue drivers, absorbing CPIs 30 to 50 percent higher in exchange for stronger payer conversion and lifetime value.

What changed was how advertisers connected acquisition to monetization. Leading teams increasingly optimized around early value signals, aligning creative, bidding, and channel mix to payer propensity rather than raw installs. This approach gained momentum over the year and was especially evident in Q3 and Q4, when value based optimization helped advertisers sustain scale despite rising costs.

Scale and monetization diverged across gaming genres.



Gaming User Acquisition in 2025: What Actually Changed.

Seasonality became clearer and more actionable

Seasonality has always shaped gaming UA, but 2025 made the inflection points more predictable.

Q1 was conservative and optimization focused. Q2 marked a shift toward expansion as confidence in performance predictability improved, despite only modest install growth. Q3 sustained that momentum, with gaming installs and spend both increasing quarter over quarter. Q4 combined peak competition with peak opportunity, as gaming spend climbed sharply into the holiday window without the corresponding ROAS collapse seen in prior years.

The takeaway was clear. Success in 2025 was less about avoiding expensive periods and more about being operationally ready to compete during them.

The contrast between Q1 caution and Q4 confidence summed up the year. Gaming UA ended 2025 defined not by restraint, but by selective, well measured growth.



Where Budgets Went in 2025

Android scaled. iOS defined efficiency.

At a global level, platform dynamics remained familiar. Android continued to deliver the majority of installs, driven by scale, broader geographic reach, and lower average CPIs that were often 40 to 60 percent lower than iOS benchmarks. iOS generated fewer installs, but a disproportionate share of revenue, reinforcing its role as an efficiency and monetization focused channel.

What evolved was how marketers treated the platforms.

Top performers stopped trying to optimize Android and iOS the same way. They approached them as fundamentally different acquisition environments, tailoring creative, bidding, and measurement strategies to each.

Android scaled installs,
iOS drove value.



Where Budgets Went in 2025

Paid social stayed dominant, but concentration risk grew

Paid social remained the backbone of gaming user acquisition throughout 2025, accounting for the majority of spend and installs globally. However, quarterly data showed that marginal returns within primary social channels declined more quickly in the second half of the year, particularly in Q3 and Q4.

Auction volatility, creative fatigue, and rising competition all amplified the downside of over concentration. Advertisers who diversified beyond their primary channels often achieved stronger marginal returns, with some seeing mid single digit improvements in ROAS compared to peers that remained channel constrained.

By Q4, diversification was no longer just a growth lever. It became a risk management strategy.

Diversification became a requirement, not a tactic.

CONCENTRATION RISK



- ★ Policy exposure
- ★ Performance volatility
- ★ Limited optionality

DIVERSIFIED PORTFOLIO



- ✓ Risk mitigation
- ✓ Stable performance
- ✓ Strategic flexibility

Where Budgets Went in 2025

Creative became the most controllable performance lever

Across platforms and channels, creative emerged as the single most controllable driver of performance in 2025.

Short form video, UGC inspired assets, and fast iteration cycles consistently outperformed static or overly polished formats. Advertisers with high creative velocity sustained performance longer, while those with slower refresh cycles saw ROAS decay accelerate, particularly during Q4 peak competition.



Measuring Growth When Signals are Imperfect

Measurement maturity became a competitive advantage

In 2025, measurement sophistication was often the difference between confident scaling and cautious stagnation.

Advertisers with advanced attribution frameworks allocated budgets more decisively and optimized with greater clarity. Those relying on simplistic models struggled to interpret performance signals in an increasingly complex environment.



Moving beyond last touch attribution

Last touch attribution continued to understate the value of upper and mid funnel activity. Gaming advertisers that adopted multi touch attribution gained visibility into assist value and cross channel influence.

That insight enabled more balanced media strategies and reduced the tendency to over invest in bottom funnel tactics at the expense of long term growth.



Modeling filled the gaps left by signal loss

Privacy driven signal loss, particularly on iOS, did not disappear in 2025. But leading advertisers adapted.

Modeled conversions and blended performance metrics allowed teams to maintain optimization continuity. By aligning stakeholders around modeled outcomes, top performers reduced internal friction and made decisions faster.



What 2025 Taught Gaming Marketers Heading into 2026

Top 3 lessons:

- 1 Discipline outperformed aggression. Structured growth beat volume chasing.
- 2 Creative velocity delivered more durable gains than simply adding new channels.
- 3 Most importantly, confidence unlocked smarter scaling. Advertisers who trusted their measurement frameworks moved faster, navigated competition more effectively, and exited 2025 in a stronger position than they entered it.



04

The Full-Funnel Framework for Mobile Gaming

The Full-Funnel Framework

A simple, repeatable framework for profitable growth.

Rising acquisition costs, flat user growth, and rapid churn are exposing the limits of performance-first marketing. As **early user churn** becomes the defining constraint, **2026 marks a turning point**—growth will no longer be driven by spend or isolated optimization.

In this section, Aarki introduces a **retention-led, full-funnel framework** that unites acquisition, engagement, and reactivation into a continuous learning system—where signals compound and intelligence grows with every interaction.

The marketers who win next will be those who move **from campaigns to systems**, and **from short-term conversion to lasting value**.



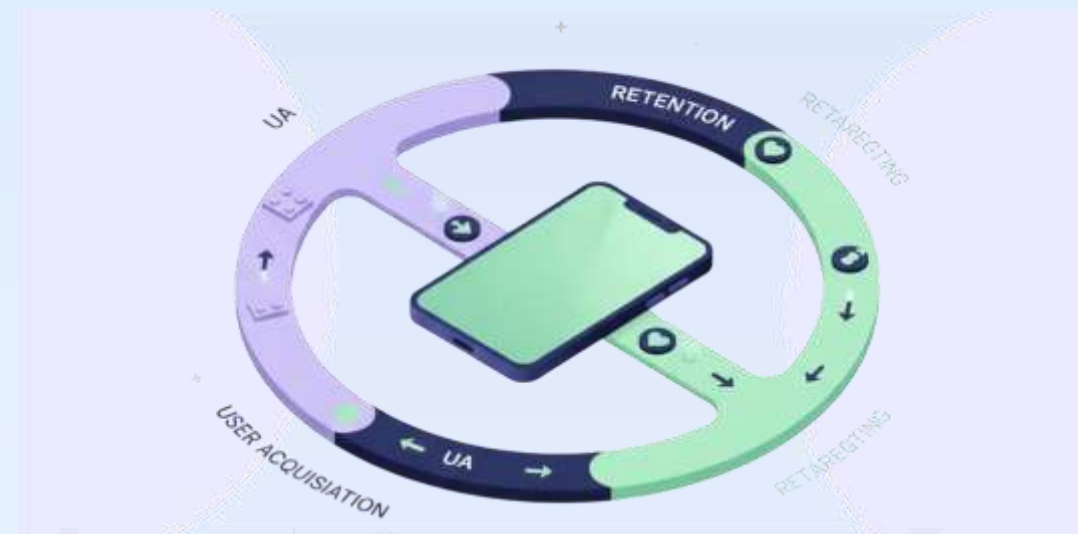
Growth You Can Sustain

Mobile growth is full-funnel growth.

Aarki data reveals UA costs rose 12% year-over-year while budgets jumped 26%¹. At the same time, user growth was nearly flat growing only 2%².

This widening gap between spend and growth signals a clear limit to performance-first thinking.

Marketers need a new framework—one that prioritizes building genuine user connection, not just driving short-term conversions.



The shift

According to Business of Apps, over 95% of mobile game installers churn within 30 days across both iOS and Google Play³.

With churn at this scale, 2026 marks a turning point for sustainable growth—one that demands retention-led orchestration, where acquisition, engagement, and reactivation operate as one learning system.

***“Retention is the new performance.
And performance is the new brand.”***

Rajeev Ranjan,
VP of Product, Aarki



How Growth Actually Compounds

The real value is created after installs - not before it ends.

Growth today is not a straight line. It is a continuous exchange of signals, stories, and actions that compound over time.

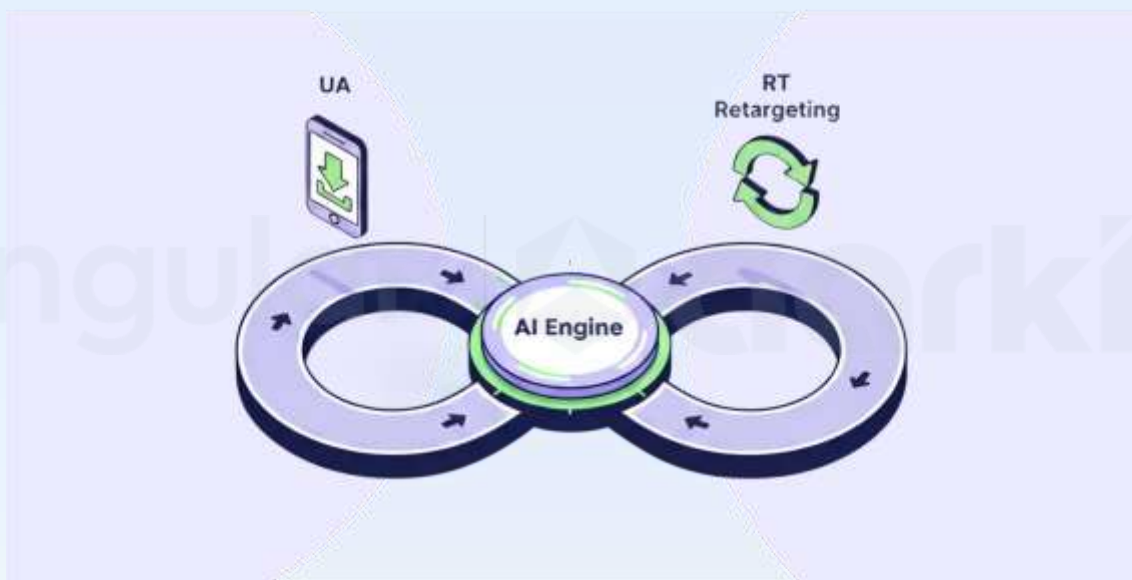
The left loop captures and converts attention through **User Acquisition (UA)**.

The right loop re-engages and retains users through **Retargeting (RT)**.

At the center is Aarki's differentiator, an intelligent engine powered by **supervised AI**, **creative intelligence**, and **data feedback loops** that accelerate both sides.

Supervised AI combines human insight with machine precision. It learns from campaign performance in real time, applies those learnings across channels, and keeps optimization transparent even as signals fade. This balance of human context and algorithmic speed turns automation into advantage.

The **Infinity Loop** is Aarki's model for connected, sustainable growth. It replaces the one-way funnel with a living system where every user action fuels the next.



- ▶ Each cycle strengthens the next
- ▶ Awareness becomes advocacy
- ▶ Insights from retention reshape acquisition

The Full-Funnel Framework

This is where the Aarki Infinity Loop evolves into a **Full-Funnel Framework**. This continuous system unites UA, RT, and user lifecycle into one engine of profitable growth. It's a simple, repeatable system where every signal becomes a decision, every creative becomes intelligence, and every campaign strengthens the next.

What's Changed: The funnel is no longer linear

Growth loops are value loops

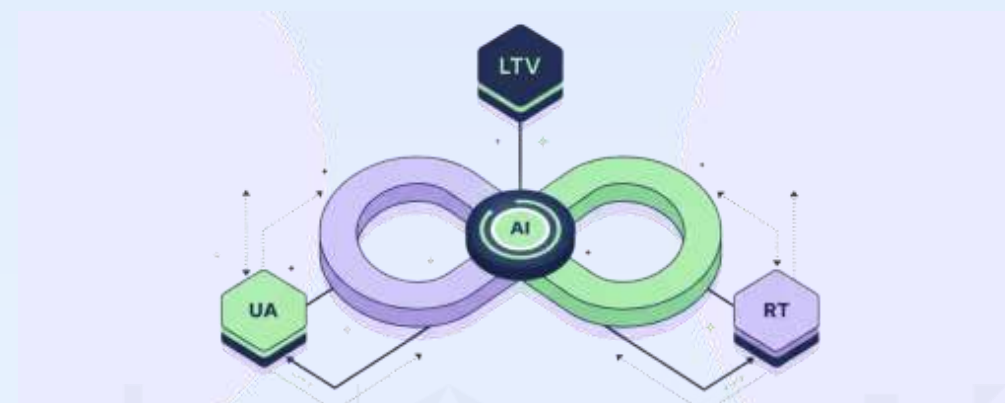
- ▶ Every creative choice, signal, and user action is a source of insight that can increase lifetime value.

The app store is no longer the storefront

- ▶ Users enter your app on their own terms, from web, mobile, and new touchpoints like webshops and alternative app stores.

Distribution is fragmented

- ▶ As entry points multiply, the ability to design and connect owned experiences becomes the edge.



The opportunity: Own the relationship, not just the install

- ▶ Remove friction across the funnel
- ▶ Connect acquisition to re-engagement
- ▶ Prioritize LTV as the key metric of growth

The Fantastic 5: Your New Rules of Retention

Five Rules. One goal: Users who stay, spend, and compound your growth.

01 | Retention starts on Day 0, not Day 30.



- The most valuable users don't just stay. They start strong.
- Build engagement into onboarding and show your value before the first purchase.

02 | Measure relationships, not reach.



- Track quality over quantity.
- Engagement frequency, session depth, and reactivation cost give you the 360-degree view of your user base.

03 | Refresh faster than fatigue.



- Creative relevance decays in days.
- Plan refresh cycles proactively to stay ahead of attention loss and maintain consistent storytelling across the loop.

Aarki's creative intelligence data shows that CTR can drop ≈ 45% after 4 exposures without refresh, while structured cycles improve performance stability by 30%¹.

04 | Reactivation is R&D.



- Every re-engagement campaign is a test.
- Winning messages reveal what matters most to users who are about to churn, so harness this insight to power smarter UA.

Aarki observes that reactivated users deliver significantly higher LTV than newly acquired users in the same cohort.

05 | Scale what works, pause what plateaus.



- Don't chase momentum; sustain it.
- Reinvest in audiences and creatives that build lasting value, not quick wins.

Teams that maintain a consistent reactivation budget see steadier ROI curves and reduced volatility in campaign returns.

Retention isn't a phase. It's a performance system.

When lifecycle and creative work in sync, each retained user becomes a multiplier, boosting ROI, building loyalty, and powering the next cycle of growth.

“Retention isn't a phase of marketing. It's the proof that your strategy works.”

Avi Das,

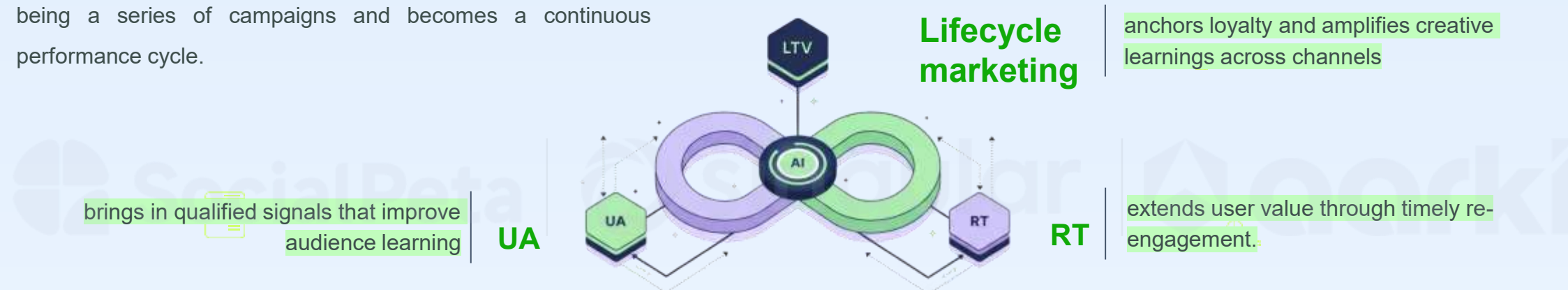
CRO, Aarki

Orchestrating UA, RT & Lifecycle Marketing

Your next move

When teams work in isolation, insights stay trapped.

But when acquisition, retargeting, and lifecycle marketing share the same data, creative, and feedback systems, growth stops being a series of campaigns and becomes a continuous performance cycle.



Together, they create what Aarki calls **the orchestration advantage**, a growth engine fueled by collaboration, creative intelligence, and unified measurement.

- Teams sharing creative learnings across UA and RT see up to **30% faster optimization cycles**;
- Combined UA+RT campaigns deliver **20% higher LTV** than siloed activations¹.

“ The marketers who win aren’t running separate systems; they’re conducting a single, smart orchestra.”

Rajeev Ranjan,

VP of Product, Aarki

When Operating in Silos, Duplication and Waste Multiply.

Aarki analysis shows overlapping audience segments create self-competition within auctions, driving up CPMs and exhausting creative.

The result? Confusion, not conversion.

The solution? Connecting UA and retention to deliver the value isolated teams can't match.

But first, teams have to beat what Aarki CRO Avi Das calls the “**four bosses**”:

Creative Gridlock

Ad fatigue sets in within a week of high-frequency exposure. Yet only 10-20% of marketers actually turn data into creative performance¹.

Inflated Costs

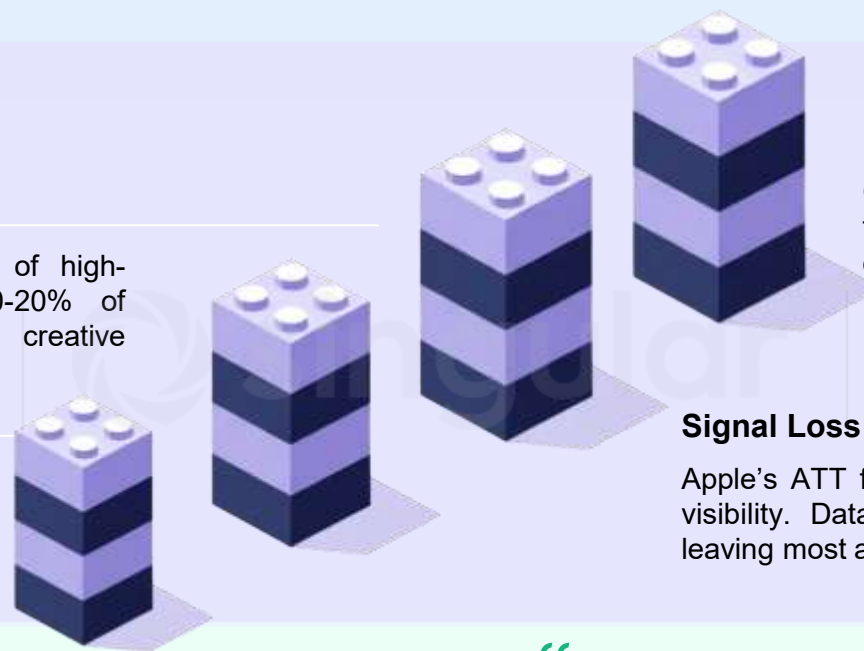
Global CPIs keep rising across nearly every category. Fewer than 5% of users monetize, and in casual genres, that figure is below 2%². Break-even now stretches beyond 90 days.

Privacy Constraints

Global privacy laws now limit how data can be tracked, stored, and shared. Consent is harder to earn, and users are less tolerant of intrusive ads.

Signal Loss

Apple's ATT framework has sharply reduced user-level visibility. Data shows global opt-in rates near 35%³, leaving most advertisers optimizing on incomplete data.



The way forward isn't to fight harder.
It's to fight smarter by rewiring how acquisition and retargeting work together.

*“You're not just wasting budget.
You're bidding against yourself.”*

Avi Das,
CRO, Aarki



When to Scale, Pause, or Reinvest

Sustainable full-funnel growth isn't about doing more.

It's about balancing performance signals, creative feedback, and retention data to make smarter decisions.

"Smart growth isn't constant acceleration. It's controlled momentum and learning where to lean in and where to reset."

Avi Das, CRO, Aarki



Scale

- When retention outperforms the median and reactivation ROI is at least 1.5x UA ROI, increase spend.
- Push high-performing audiences and creatives that prove consistent lift across channels.



Pause

- When CPIs rise faster than LTV or creative fatigue exceeds 40%, slow down.
- Reassess segmentation, refresh creative, or rebalance between UA and RT.



Reinvest

- When new audience segments or creative learnings show early promise, reinvest.
- Shift budgets from plateauing campaigns to proven performers that sustain LTV growth.

The power of pacing

Sustainable growth isn't about speed. It's about **timing, precision, and knowing when to hold your ground.**

Aarki analysis shows that marketers who pace spend based on **retention and creative performance** sustain a **20%+ ROI stability** and reduce quarter-over-quarter volatility **by 25%**¹.

Sharpening Your Competitive Edge

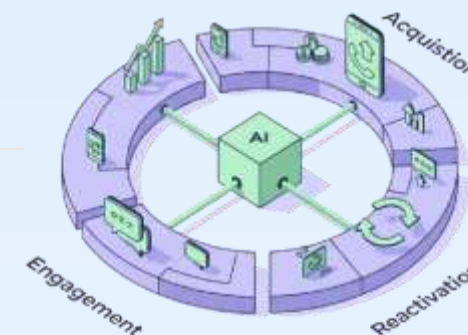
The future of growth isn't about scale. It's about staying power.

Smart systems respond to signals. Superior systems remember, refine, and return greater value every time.

This continual learning is at the core of full-funnel growth.

- Every impression, interaction, and insight powers the next.
- Each interaction refines the model.
- Each campaign makes the next one smarter.

Teams orchestrate **user acquisition, engagement, reactivation**, as a unified learning engine – one where AI turns patterns into **predictive intelligence** for tomorrow's performance gains.



Growth in 2026 won't come from optimizing in silos. It will come from adopting a full-funnel framework built for learning and retention.

Now is the time to make that shift.

“Every loop teaches you something. What matters is how fast you turn that learning into action.”

Aman Sareen,
CEO, Aarki



How Aarki helped **ROVIO** re-engage high-value users and consistently over achieve their D90 ROI goal

Objective

Re-engage lapsed high-value users and maximize long-term ROI for *Angry Birds 2* through advanced retargeting.

Aarki Solution

Aarki's Supervised-AI Powered Retargeting, Driving Higher LTV and ROI

- Built high-value LTV cohorts using in-app behavior analysis
- Applied predictive models to estimate user LTV and optimize bids
- Delivered data-driven, performance-optimized creatives via Aarki Creative Studio

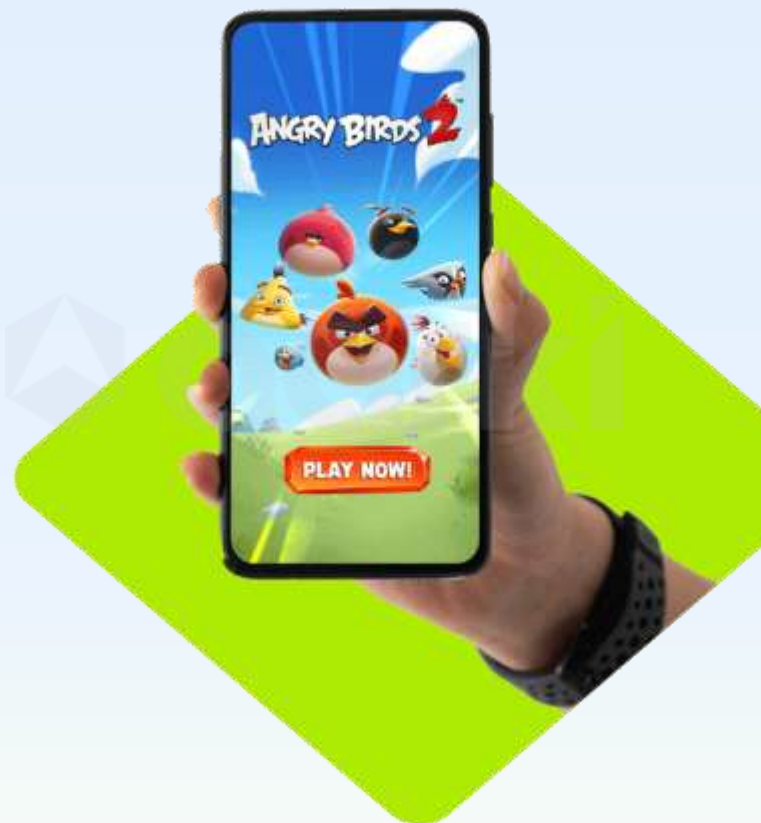
Key Results

Aarki helped Rovio successfully re-activate high-value users, drive sustained ROI growth, and unlock long-term value through AI-driven targeting and creative optimization.

- D90 ROI exceeded goals by an average of 1.7×
- D7 ROI consistently achieved (avg. 1.3×
- D365 LTV goal reached within 3 months
- Scaled budget efficiently while re-engaging high-value users

"With Aarki's support and expertise, we reached our long-term ROI goals and saw continuous performance improvement."

— User Acquisition Manager, Rovio



05

Marketing Insights Into Top Mobile Game Genres

4X Strategy: The Competitive Scorecard

Perspective: Funtap Games | Analysis of Early Indicators

Why do early indicators matter? If you are utilizing a "minigame as a hook" strategy, you must validate whether the "hook" is accepted.

What are the things we will analyze?

- D1 Retention: The First Hook and The Funnel Filter.
- D7 Retention: The Core Challenge and The Social Filter.
- Playtime Behavior Analysis (Daily Active Playtime, Session Structure) for the first week.

What really determines Global Launch?

D1 and D7 Retention: Competitive Level

- Minimum Threshold for UA. At this level, the game can break even if long-term LTV is strong. The majority of mid-tier 4X games reside here.
- At this level, the Social Ecology functions well. Guild War events have sufficient participation.
- If your game is a pure Classic SLG with a D1 of only 25-30%, you will lose the "bidding war" because competitors have a wider and more efficient user funnel.
- Alliance Join Rate: In-depth reports from Funtap Games indicate that the D7 of 4X games depends entirely on the Alliance Join Rate.
- The rate of players joining an Alliance before D3 must reach >60% for a healthy ecosystem.
- Players who join an Alliance and perform "Help" interactions (reducing build time) or participate in "Rallies" (Boss raids) have a D7 rate 3-4 times higher than Solo players.

Game Segment	D1 Retention (Android)	D1 Retention (iOS)
Industry Median	20% - 25%	25% - 28%
Competitive Level	30% - 35%	35% - 40%
Market Leaders	40% - 45%	45% - 55%

Game Segment	D7 Retention
Industry Median	10% - 15%
Competitive Level	15% - 18%
Market Leaders	18% - 25% (or higher)

Playtime Behavior Analysis for the first week

Daily Active Playtime & Session Structure

- **The Honeymoon Phase:** During the first week, active users commit significant time (40-60 minutes daily), with potential whales reaching 1.5 to 3 hours. Day 1 peaks at ~90 minutes due to the "Initial Gratification" of rapid progression and tutorial completion.
- **Frequency Over Duration (The "Mindshare" Model):** Unlike MOBA or RPGs, 4X strategy relies on a "High Frequency, Variable Length" pattern (8-12 sessions/day). The gameplay mix consists of 70% short check-ins (3-5 mins) for maintenance and 30% deep engagement sessions (20-45 mins) for events, designed to occupy the player's mind throughout the day.
- **The Social Breakpoint (D7 Bifurcation):** By Day 7, playtime sustainability is entirely dependent on Social Integration. Players in Alliances maintain high engagement (45m+ for rallies/PvP), while solo players see a sharp decline (<20m) as build timers extend to 4-8 hours, marking a critical retention risk.

What really determines Global Launch?

Soft launch metrics are inflated by "Golden Cohorts" and typically drop 10-15% globally. Aim for 45% D1 in Beta to secure a competitive 30%.

The 10-Hour Rule: Accumulating 600 minutes (10h) of playtime in the first week increases payer probability by 5x. Capitalize on this by triggering time-limited offers during D1 or D2 playtime peaks.

Metric	Day 1	Day 7
Total Playtime	High (60–90m)	Variable (Depends on Events/War)
Session Count	Low (2–3 long sessions)	High (8–12 short sessions)
Timer Length	Seconds to Minutes	Hours (4h–8h)
Primary Motivator	Instant Progression	Alliance Pressure & Events
Key Risk	Boredom if timers are too long too soon	Loneliness if not in an Alliance by D4

Funtap Games Recommendations

4X Strategy: The Competitive Scorecard

KPI	Testing Phase	Soft Launch	Global Launch
D1 Retention	35%	35% - 40%	> 45%
D7 Retention	12%	15% - 18%	> 18%
Playtime (D1)	>30 mins	>60 mins	>90 mins
Session Frequency	4 times/day	8 - 10 times/day	12+ times/day
Alliance Join Rate (D3)	40%	> 65%	> 80%

These are the minimum required indicators; *to be ready for scaling, they need to be significantly higher.*

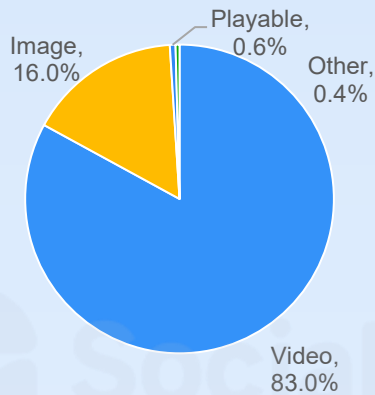
Key Recommendations for Early Retention and Scale Readiness

- D1 > 40% via Hybrid Onboarding**
Traditional city-building creates early churn. The FTUE should deliver strong engagement within the first 15 minutes by integrating action, puzzles, or cinematic moments, following proven 4X benchmarks.
- Secure D7 Through Mandatory Socialization**
Alliance joining should be a required main quest within the first 24 hours. Core events must enforce group play, as D7 retention in 4X titles is driven by guild participation.
- Build Habits with Early Time Compression**
Accelerate Week 1 progression using abundant speed-ups. Avoid long early timers; prioritize establishing a ~60 minutes/day play habit before tightening the economy in Week 2.
- Let Paid Traffic Validate Scalability**
Do not rely on Organic metrics. Test early with Paid UA. If Paid D1 is below 35%, the product is not ready for global scaling.

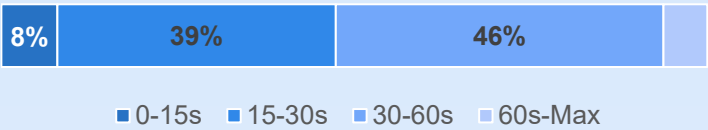
Trends in Advertisers & Creatives for SLGs

"Lightweight + mismatched socializing" has become the norm for SLGs. Among a great number of mini-game creatives, parkour mini-game creatives became many advertisers' first choice.

Percentages of impressions of ad creatives by type



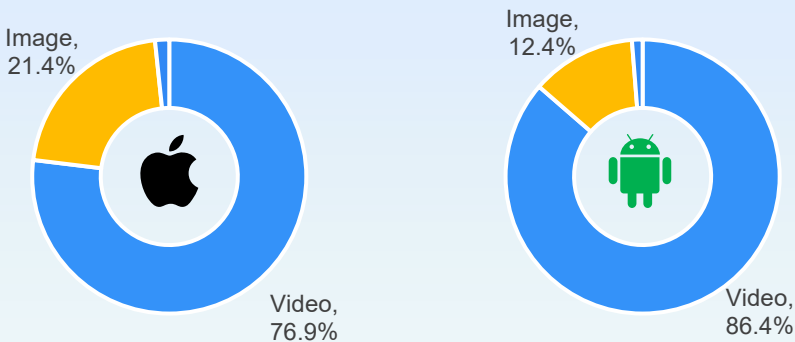
Share of video creatives by length



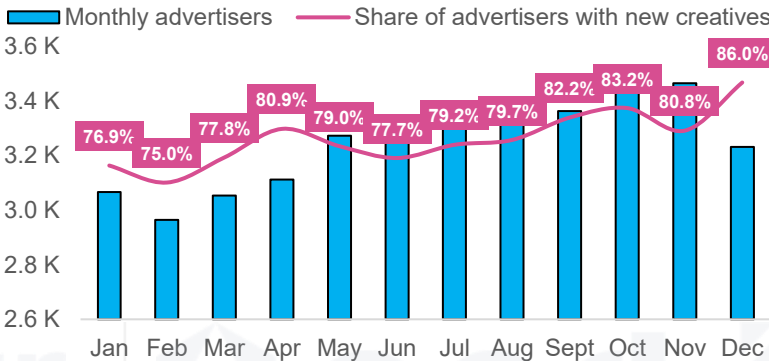
Share of image creatives by format



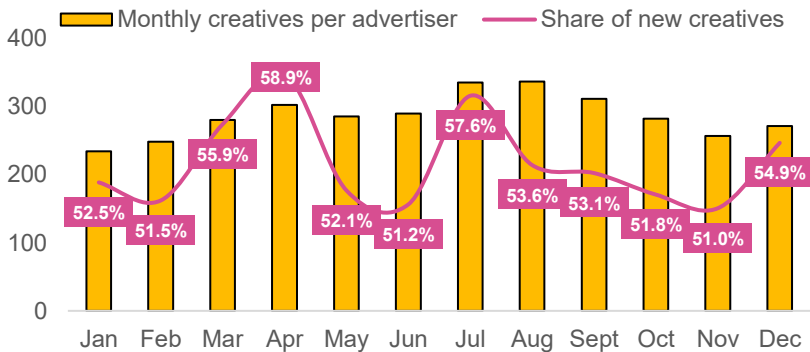
Shares of SLG ad creatives on iOS & Android



Changing trends of monthly advertisers



Changing trends of monthly active creatives



Analysis of Popular Ad Creatives for SLGs



Hitting gates & parkour + AI 3D simulation + a deliberate failure to intrigue people

Click the image to play

Popular gameplays:

SLG / RTS / Tower-defense / Construction

Common patterns in creatives:

Fall from a height → Number growth/Hitting gates & parkour → Do great mid-game → Fail in the end

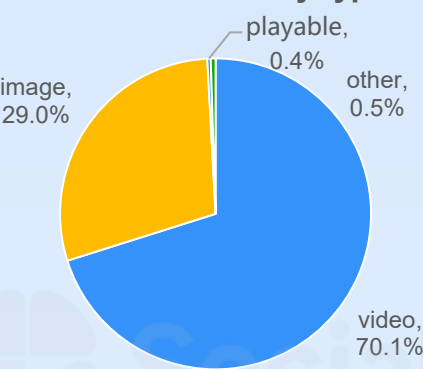
Future trends in creatives:

“Mathematical gates + parkour” will become the first choice for casual SLGs in creative patterns. The original mathematical gates are replaced with three tracks, new tools, moving gates, and other new features.

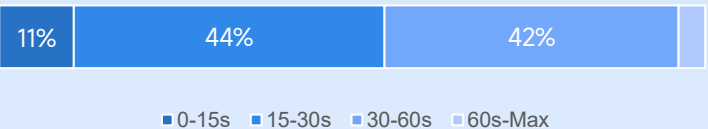
Trends in Advertisers & Creatives for RPG

Traditional numerical progression combined with IP-linked progression, new idle RPGs, roguelike RPGs, and martial arts/mild horror MMOs have gained an advantage in audiovisual promotion and are currently the mainstream genres.

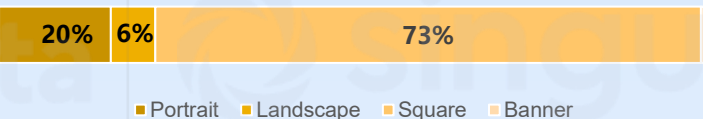
Percentages of impressions of ad creatives by type



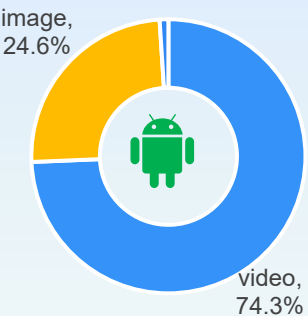
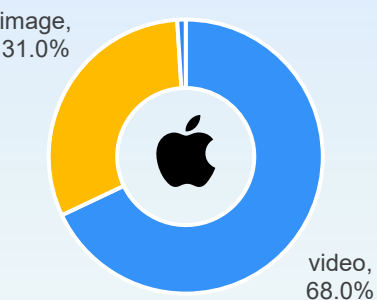
Share of video creatives by length



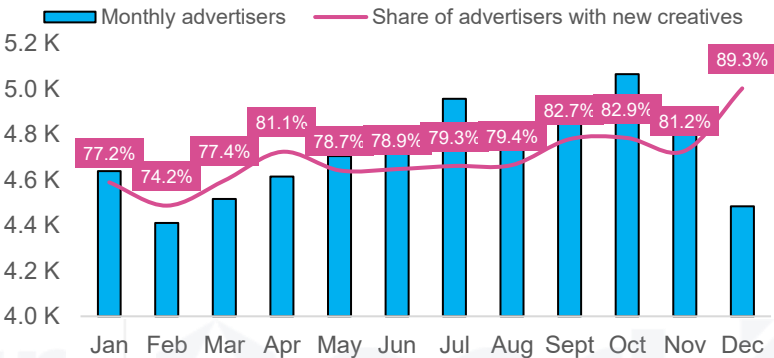
Share of image creatives by format



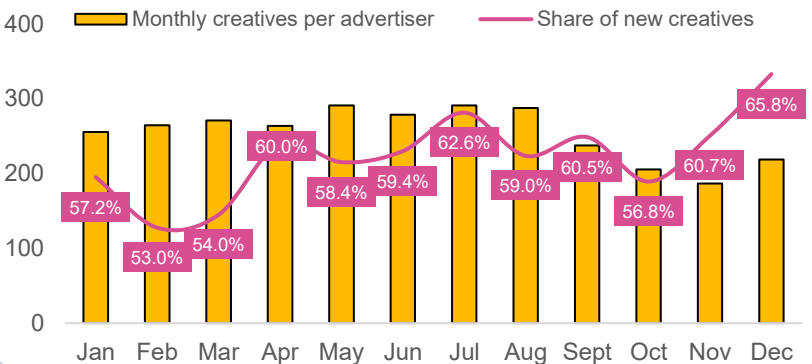
Shares of RPG ad creatives on iOS and Android



Changing trends of monthly advertisers



Changing trends of monthly active creatives



Analysis of Popular Ad Creatives for RPGs



Exaggerated/freakish AI + gameplay display + charming characters

Click the image to play

Popular gameplays:

Idle, Roguelike / MMO / turn-based
Open world / Bishōjo, Adaptation
from anime

Common patterns in creatives:

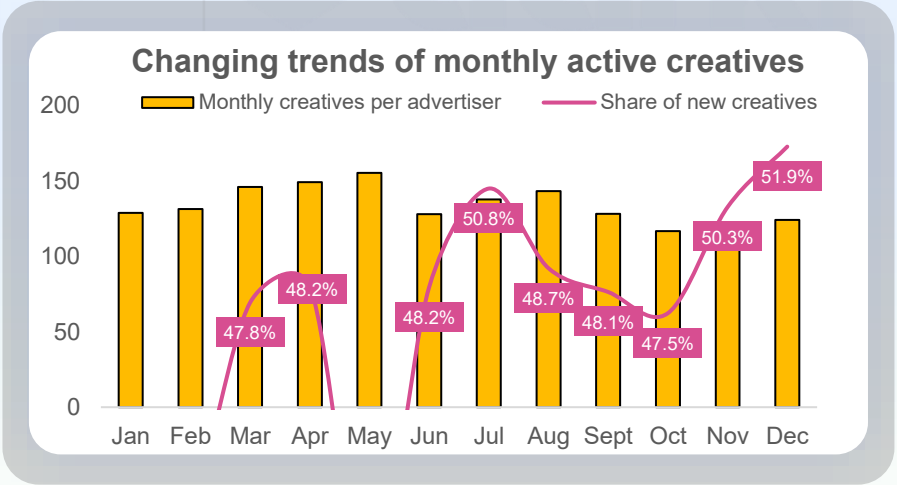
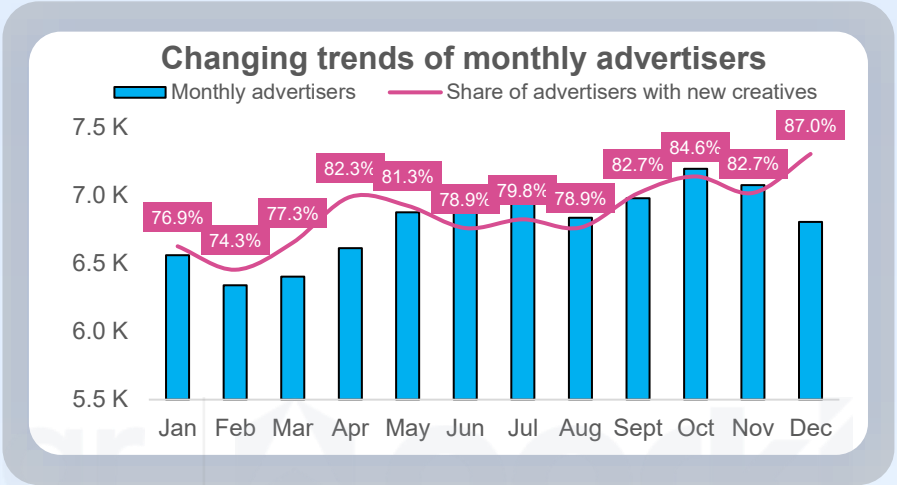
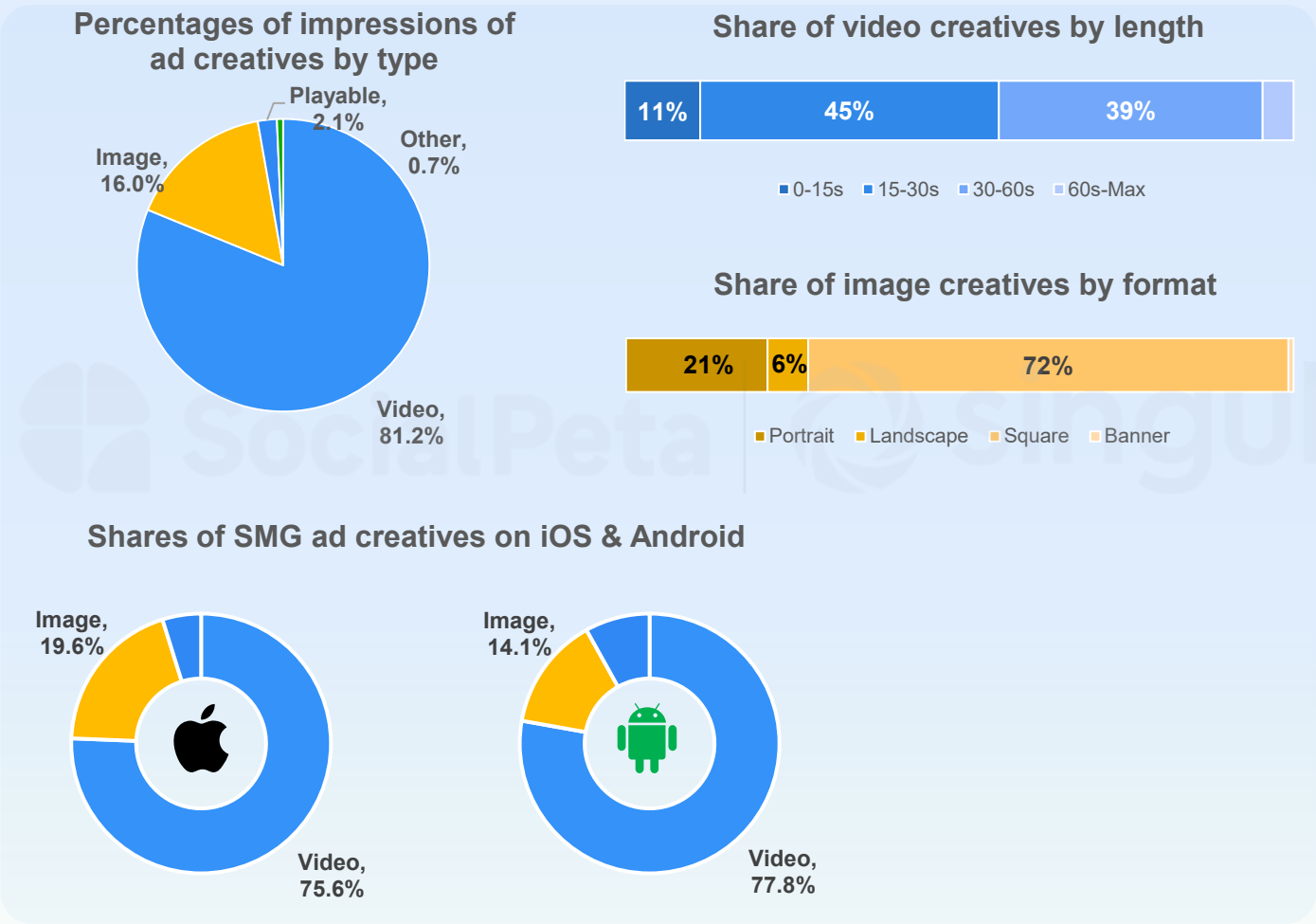
AI characters → Peculiar
Roguelike items → Multiple
battles, switching map → a
deliberate failure
Portrait generation → Display of
maps → Display of roles →
Combo to clear stages

Future trends in creatives:

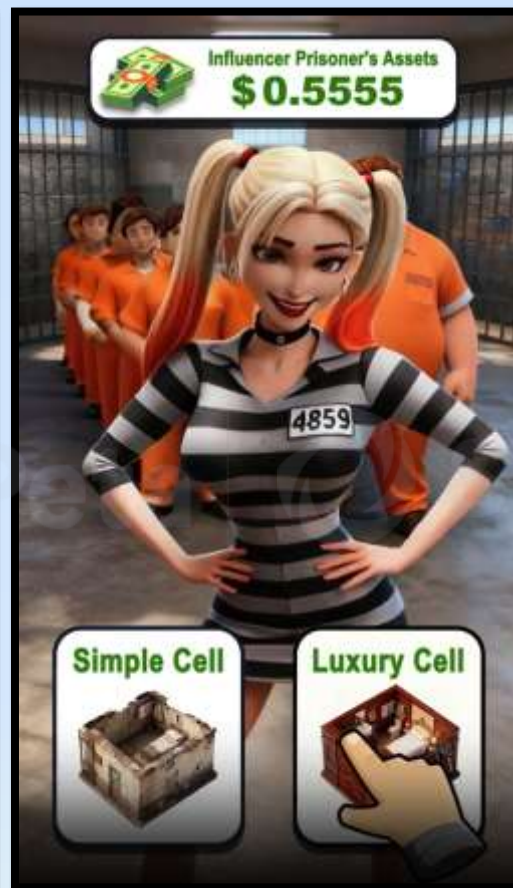
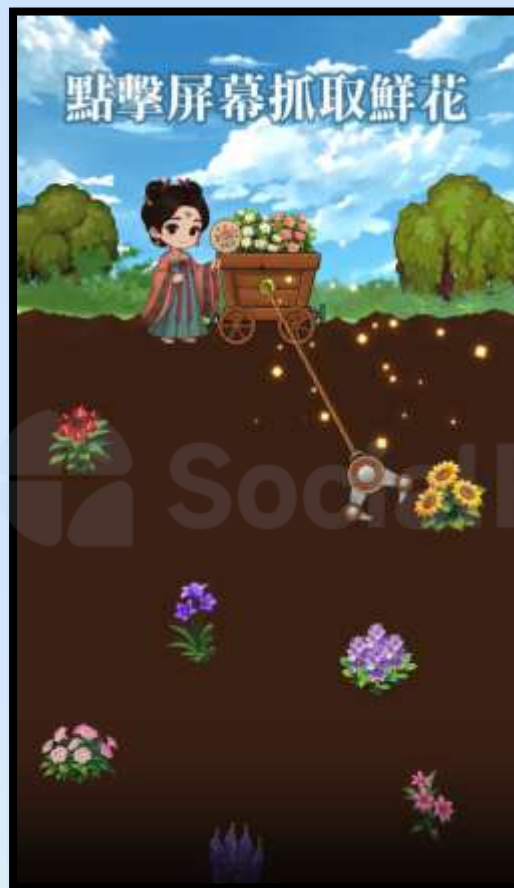
Exaggerated skill effects and
content-rich creatives are
commonly used for RPGs. Wuxia,
mystery tales, and other non-
mainstream themes are gaining
popularity.

Trends in Advertisers & Creatives for Simulation Mobile Game

The realistic management simulation gameplay performed exceptionally well, and the reuse rate of classic user acquisition materials was higher than in other categories.



Analysis of Popular Ad Creatives for SIM Games



Popular gameplays:

Business SIM
Realistic simulator
Sandbox
Make-up/outfit change
interactive novels

Common patterns in creatives:

Interaction & choices → Plot development → Deliberate failure → Sad ending

Cheating/Adultery stories → Problem solving → Considering options → Deliberate failure

Future trends in creatives:

Business SIM games also use mini-game creatives to intrigue people. Players are more easily intrigued by non-mainstream themes.

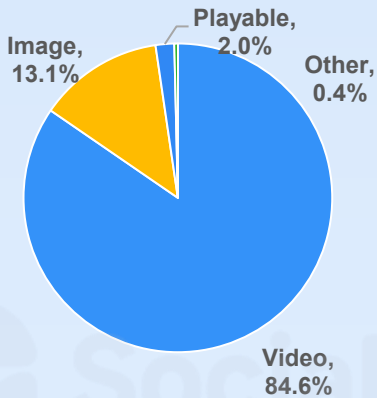
Combining/connecting minigame + AI-generated sexy girls + 3D version of reality

Click the image to play

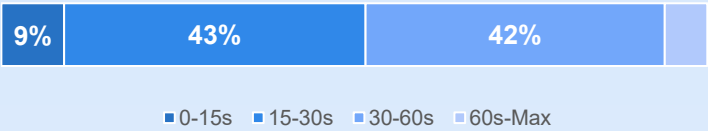
Trends in Advertisers & Creatives for Casual Mobile Games

Hybrid casual mobile games have achieved dominance in both downloads and revenue, mini-game collection platforms have overtaken competitors, and rapid iteration and adaptation have become key to the mainstream success of casual games.

Percentages of impressions of ad creatives by type



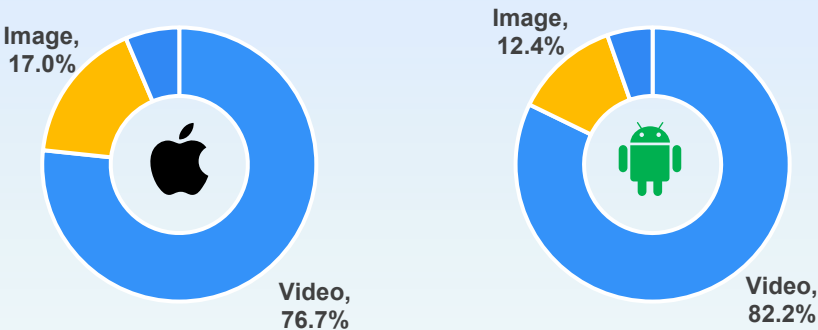
Share of video creatives by length



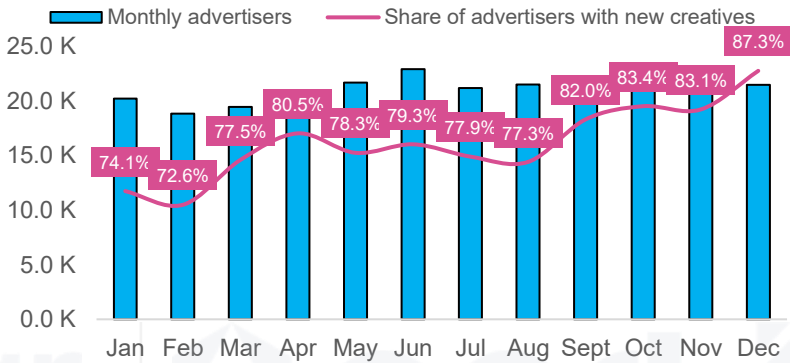
Share of image creatives by format



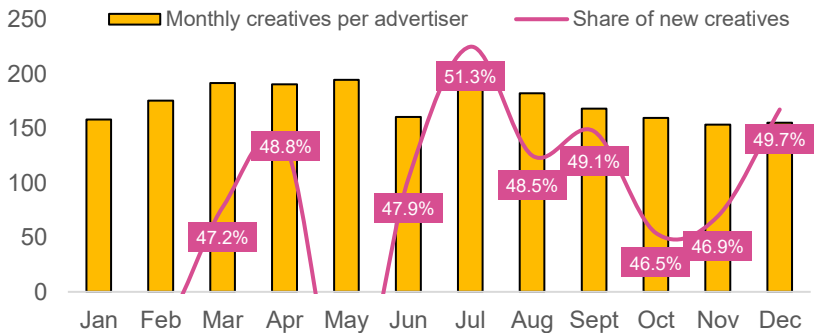
Shares of CMG ad creatives on iOS & Android



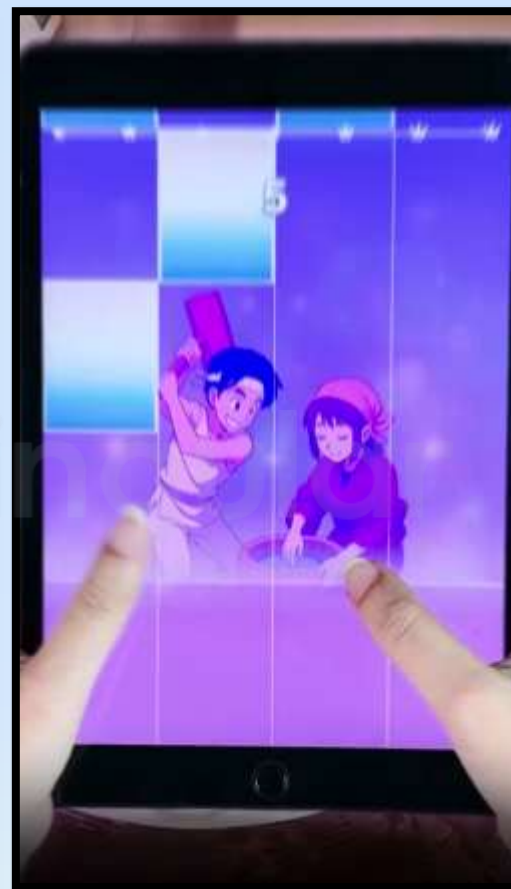
Changing trends of monthly advertisers



Changing trends of monthly active creatives



Analysis of Popular Ad Creatives for Casual Games



Start with AI-generated crazy stuff + Viral memes + Inspiration from popular jokes

Click the image to play

Popular gameplays:

Parkour/ Jumping/ Matching/ Arranging water

Common patterns in creatives:

Start with AIGC → Switch to in-game scenes → Display of gameplay

Start with viral short videos → in-game scenes → Display of gameplay

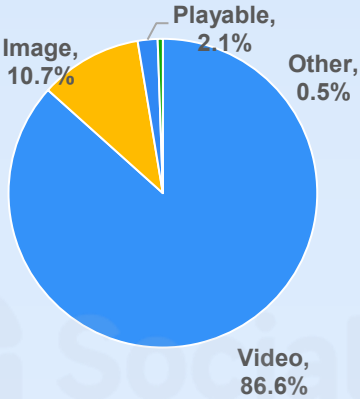
Future trends in creatives:

More casual creatives are inspired by viral short videos on TikTok. Some even use the original short videos directly. Such ad creatives are intentionally quirky and entertaining, becoming the core standard for ad openings.

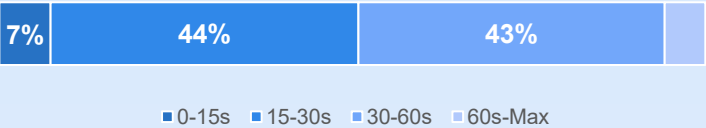
Trends in Advertisers & Creatives for Puzzle Games

Mahjong Connect, Sudoku, Word Puzzles, and Solitaire swept the top 20 of the overall ad campaign rankings, with video content showing a significantly higher percentage of ad impressions than other categories.

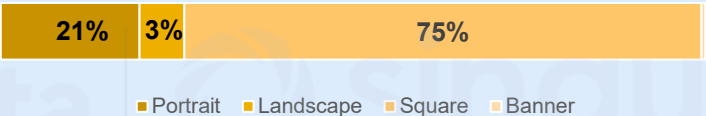
Percentages of impressions of ad creatives by type



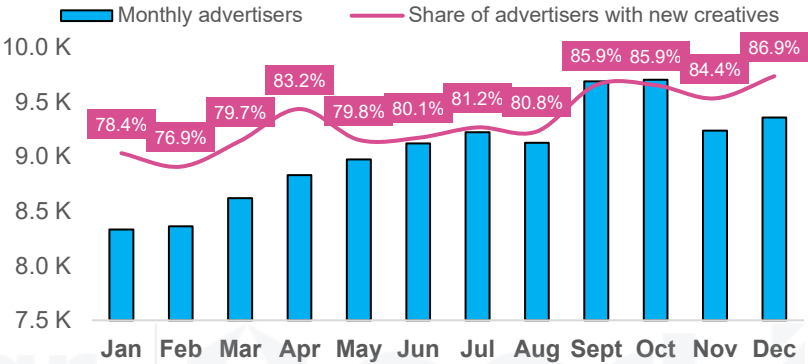
Share of video creatives by length



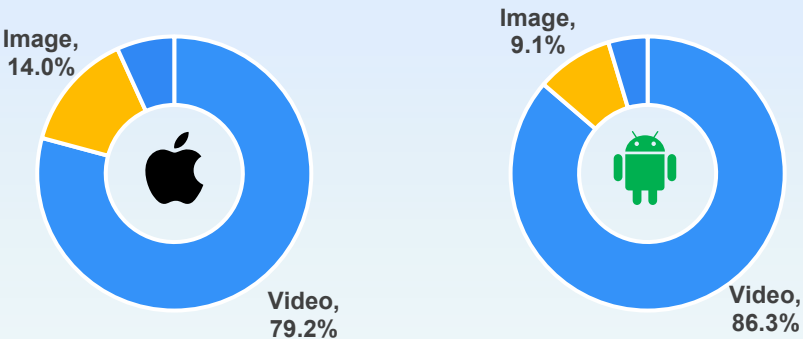
Share of image creatives by format



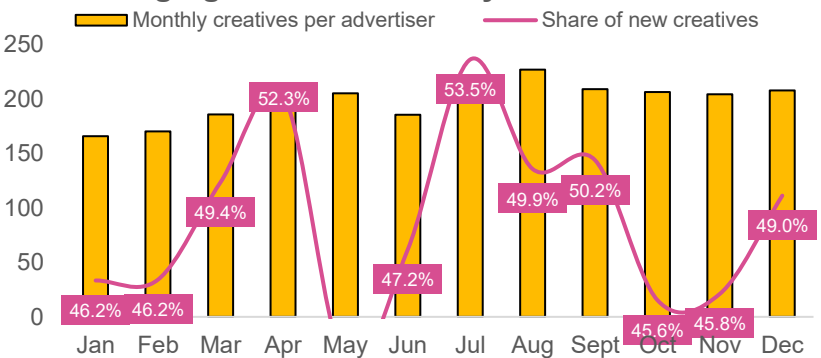
Changing trends of monthly advertisers



Shares of PG ad creatives on iOS & Android



Changing trends of monthly active creatives



Analysis of Popular Ad Creatives for Puzzle Games



Prank video + A little scary/Screwball brain teaser + authentic in-game scenes

Click the image to play

Popular gameplays:

Mahjong matching/ Sudoku/
Coloring/ Brain teaser/ Connecting

Common patterns in creatives:

A little scary + Freakish BGM →
Peculiar game items → Deliberate failure

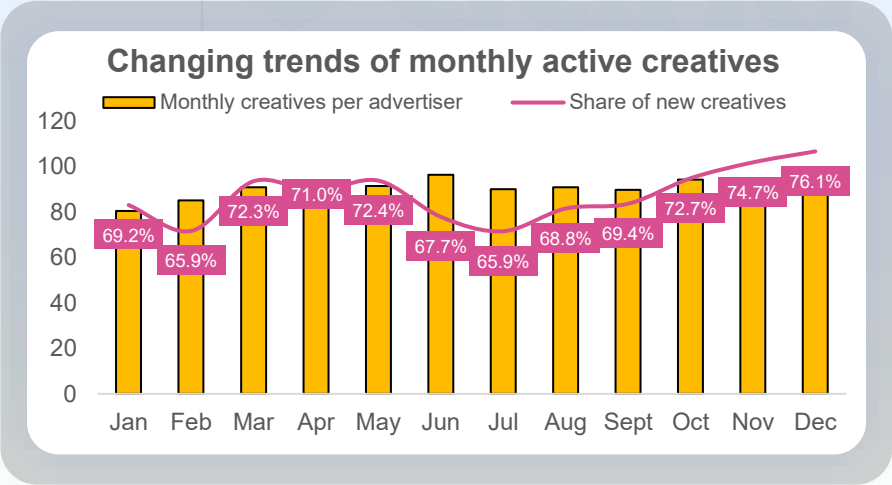
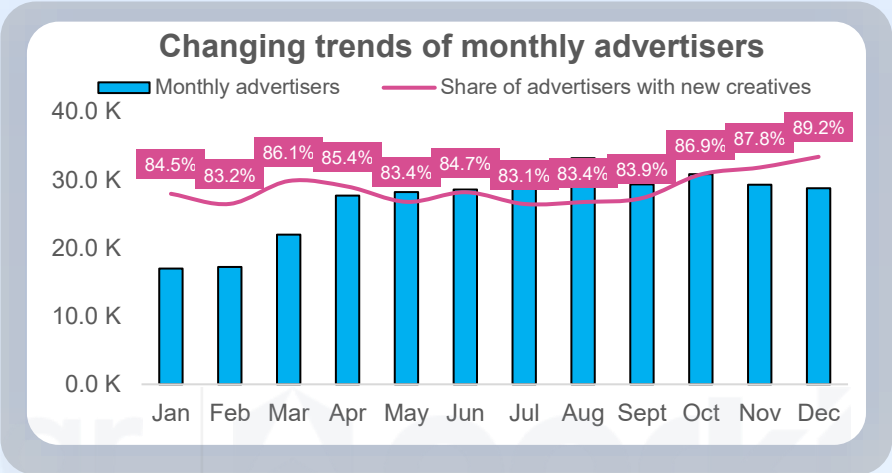
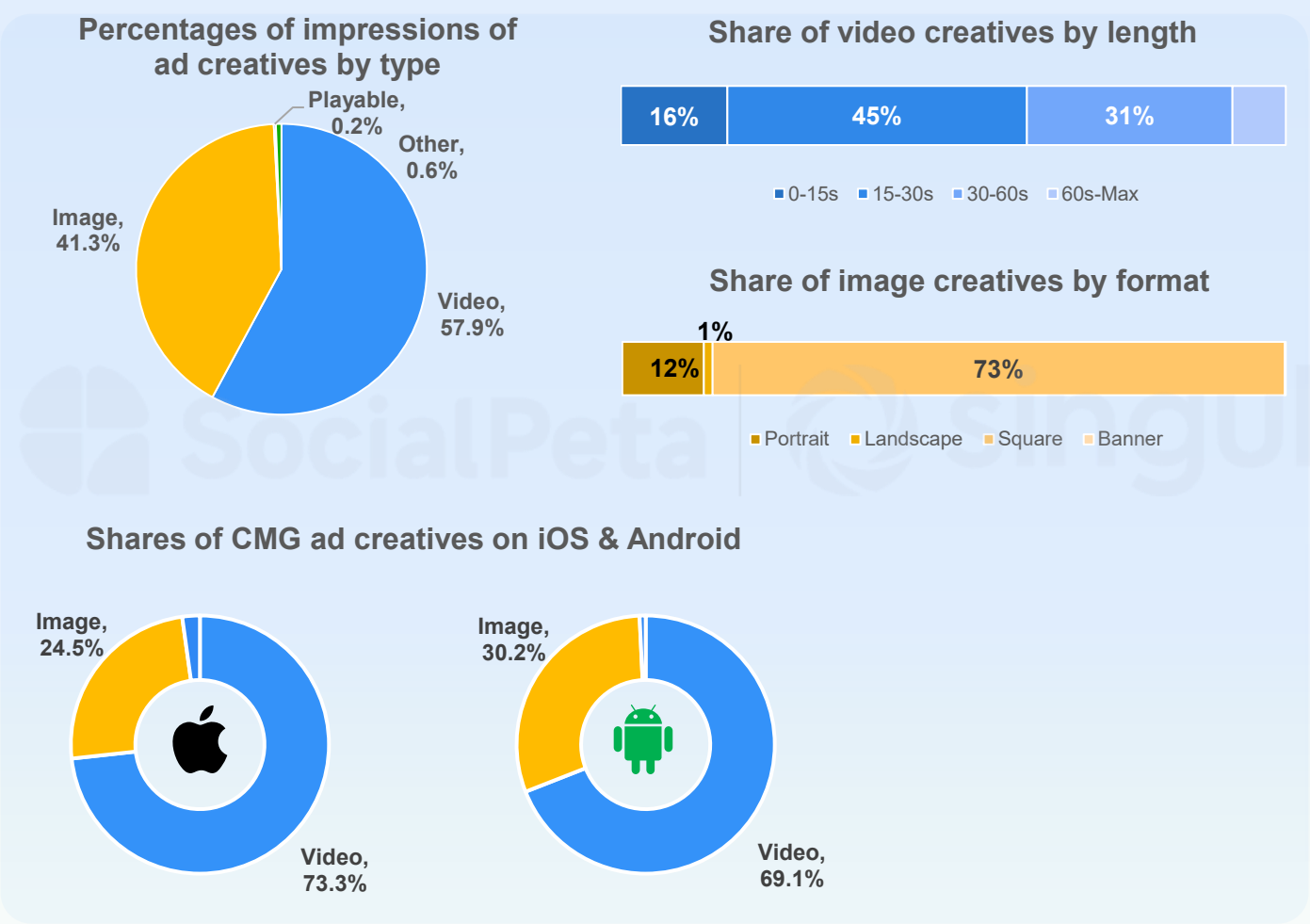
Authentic game items → Display of gameplay → Download guide

Future trends in creatives:

Based on gameplay features, puzzle game creatives can be directly extracted from in-game content. And creatives inspired by prank short videos are often used to intrigue people.

Trends in Advertisers & Creatives for Casino Mobile Games

Casino mobile games saw the highest year-on-year growth and the largest share of displayed image materials across all categories, with gold, US dollars, and cash banknotes being the most eye-catching elements in the materials.



Analysis of Popular Ad Creatives for Casino Games



Show the money + Live-action + special effects of shiny gold

Click the image to play

Popular gameplays:

Slots/ Looters/ Poker/ Bingo

Common patterns in creatives:

An angry player → An apologetic worker → Download a fake game → Download guide

Attractive beauties → Show the money → Gameplay showcase

Future trends in creatives:

Live-action, story-driven creatives are showing increasingly strong performance. With AI-powered dubbing replacement, the creatives can be used in multiple markets.

06

Popular Regional Mobile Game Marketing Insights

Advertising Trends in North American Mobile Games

The YoY growth of advertisers and ad creatives in this region were at a mid-level compared with other regions. Creatives were mainly video, and updated relatively fast. Casual games were the genre that contributed the most ad creatives.

Mobile game
advertisers

YoY 31%

13.6W ↑

Deduplicated creatives
for mobile games

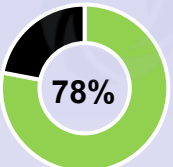
YoY 40%

27.5M ↑

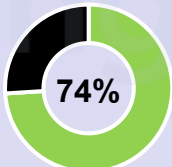
Share of video creatives

76.7%

Shares on iOS and Android



Advertisers



Creatives

Top games by advertising



Vita Mahjong



Block Blast!



Dark War Survival

New hit games



Solitaire Associations
Journey

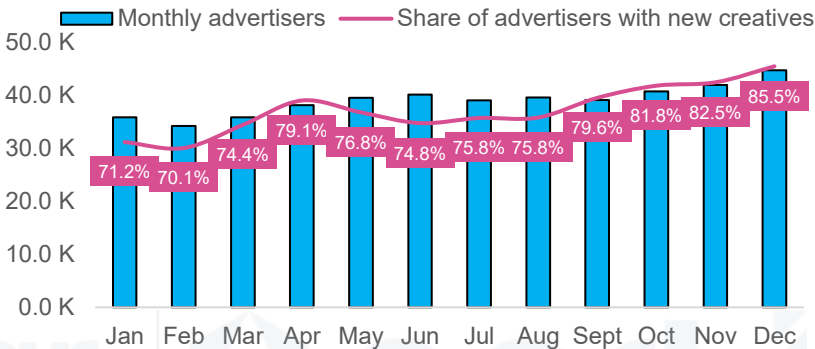


Tiles Survive!

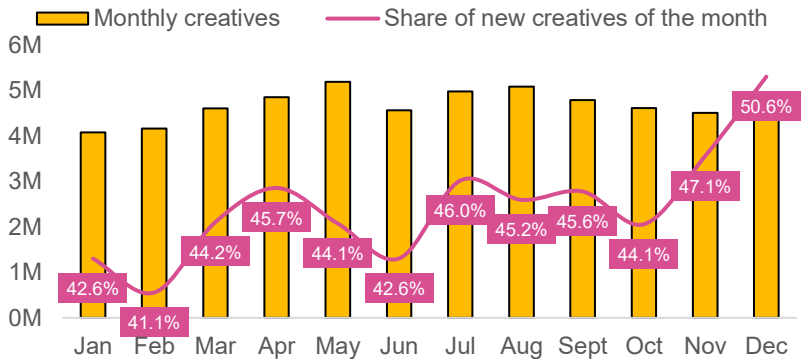


Sand Crush

Monthly Trends in Advertisers



Monthly Trends in Active Creatives



Advertising Trends in Japan and South Korea Mobile Games

Japan and South Korea saw the highest combined growth in the number of advertisers and creative materials globally. Marketing creative materials and game types showed a clear trend towards IP-based, diversified, and casual games, making Japan and South Korea major markets for mini-games going global.

Mobile game
advertisers

YoY 56%

7.1W↑

Deduplicated creatives
for mobile games

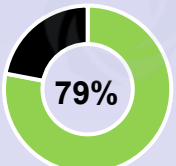
YoY 67%

14.2M↑

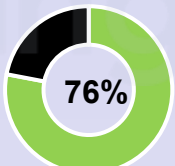
Share of video creatives

77.2%

Shares on iOS and Android



Advertisers



Creatives

Top games by advertising



X-Clash



Tile Explorer



MapleStory

New hit games



TopTop(

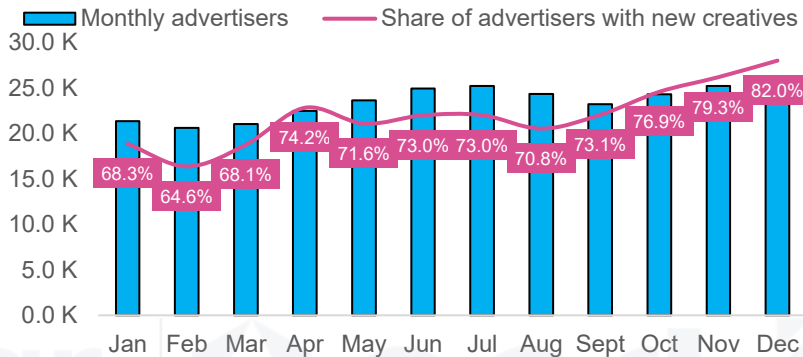


キングダム 覇道

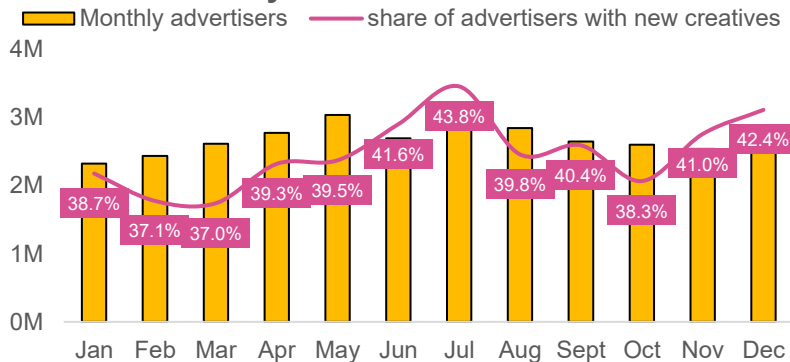


RAVEN2

Monthly Trends in Advertisers



Monthly Trends in Advertisers



Advertising Trends in Hong Kong, Macao and Taiwan Mobile Games

Video creatives slightly outperformed Japan, South Korea, and North America, becoming the absolute mainstream format for regional advertising. Popular categories included mid-to-light games such as RPGs and simulation games.

Mobile game
advertisers

YoY 51%

6.1W↑

Deduplicated creatives
for mobile games

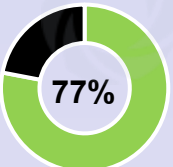
YoY 55%

13.4M↑

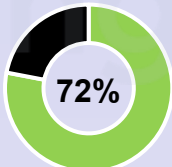
Share of video creatives

77.3%

Shares on iOS and Android



Advertisers



Creatives

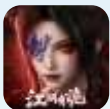
Top games by advertising



MU Online



Mahjong
Wonders



There Are
Uncanny Ways In

New hit games



Scepter & Sword

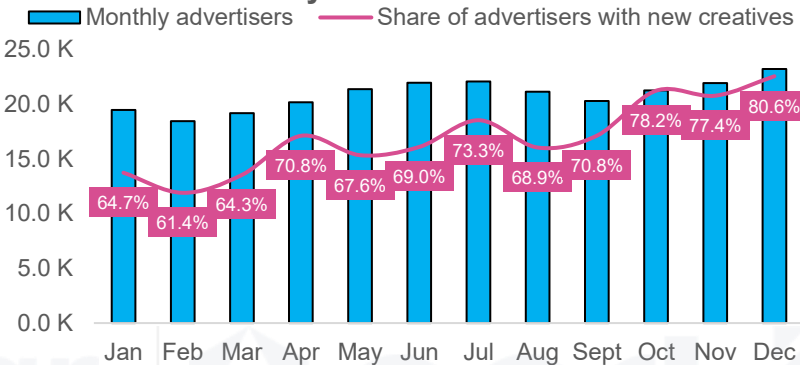


Blue Planet:
Busy King

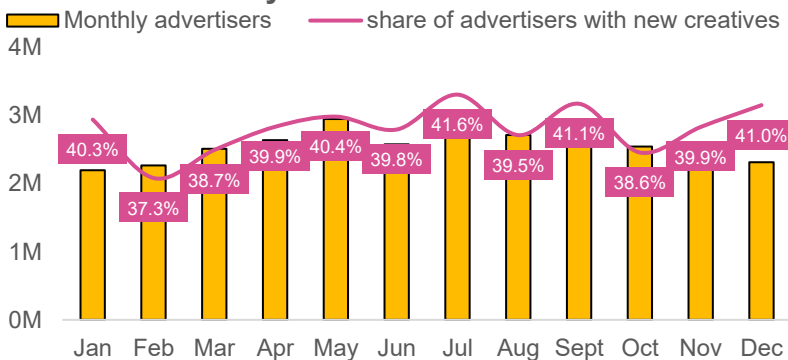


My Garden
World

Monthly Trends in Advertisers



Monthly Trends in Advertisers



Advertising Trends in Southeast Asia Mobile Games

Video creative content accounted for 70.2%, the lowest globally; popular themes were widespread; there was high acceptance of local IPs from China, Japan, and South Korea; and RPG products performed exceptionally well.

Mobile game
advertisers

YoY 26%

11.1W↑

Deduplicated creatives
for mobile games

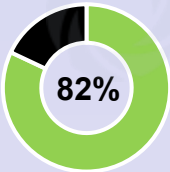
YoY 42%

19.7M↑

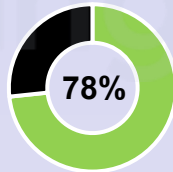
Share of video creatives

70.2%

Shares on iOS and Android



Advertisers



Creatives

Top games by advertising



Lands of Jail



Top Heroes



Emblem
Assemble: Neo

New hit games



Seven Knights
Re:BIRTH

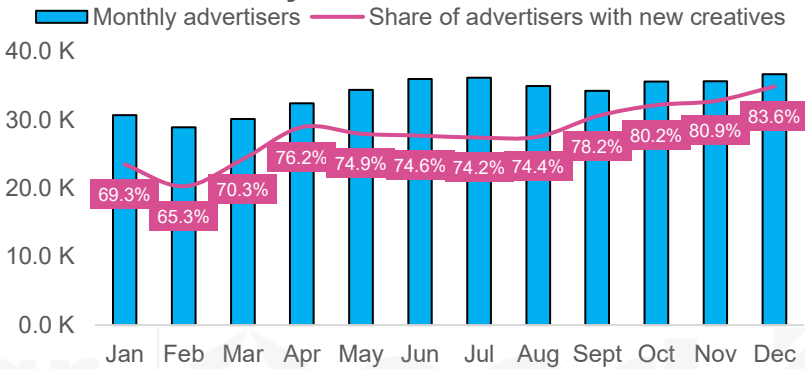


Chaos Zero
Nightmare

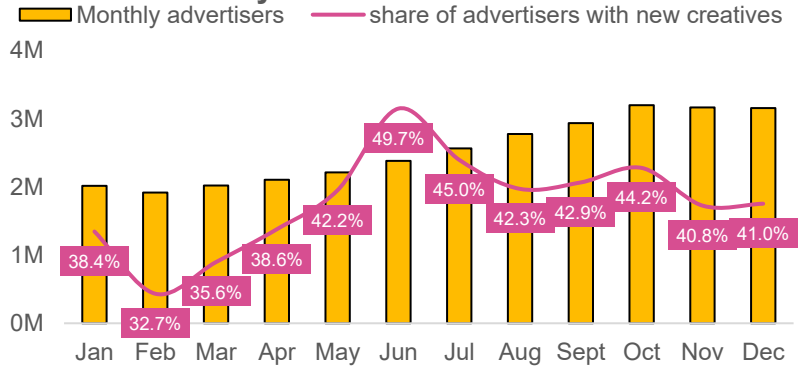


HAIKYU!!FLY
HIGH

Monthly Trends in Advertisers



Monthly Trends in Advertisers



Advertising Trends in Middle East Mobile Games

Middle Eastern games peaked their advertising spending in May and June, repeatedly using classic creatives to drive traffic, but the pace of creative iteration was slow, with new creatives consistently accounting for less than 40% of the total advertising budget each month.

Mobile game
advertisers

YoY 5.2%

6.8W↑

Deduplicated creatives
for mobile games

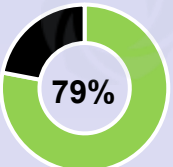
YoY 69%

11.7M↑

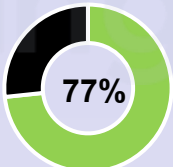
Share of video creatives

77.7%

Shares on iOS and Android



Advertisers



Creatives

Top games by advertising



Kingshot



Mafia City



Logicus

New hit games



Fate War

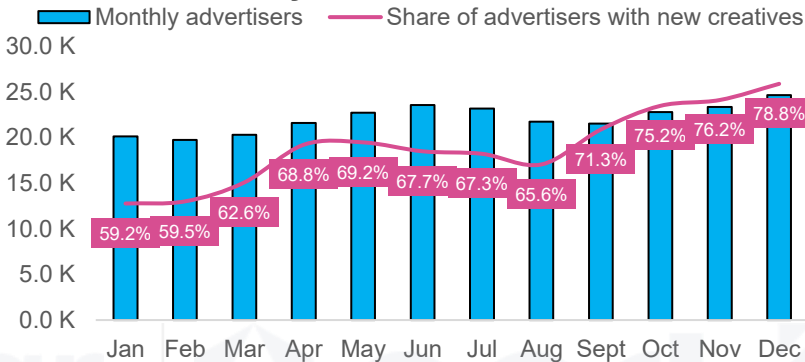


Legend of
Ymir

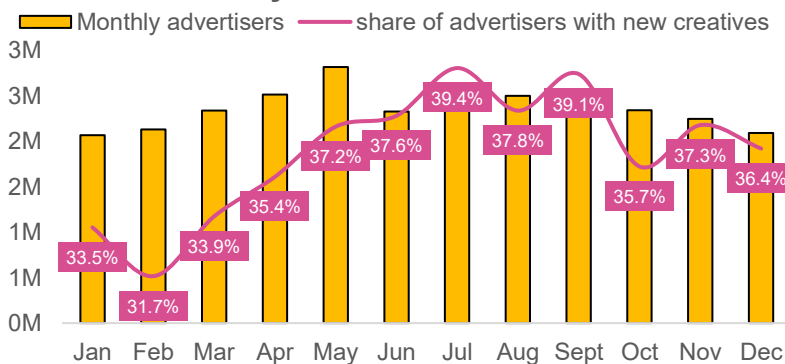


Water Match

Monthly Trends in Advertisers



Monthly Trends in Advertisers



Advertising Trends in Europe Mobile Games

As the primary market for casual puzzle products, Europe saw nearly 80% of monthly advertisers launching new creatives, reaching a peak in ad placements in Q2 2025.

Mobile game
advertisers

YoY 58%

21.1W ↑

Deduplicated creatives
for mobile games

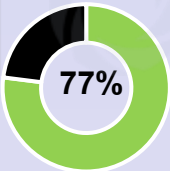
YoY 54%

29.9M ↑

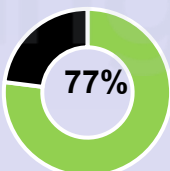
Share of video creatives

77.7%

Shares on iOS and Android



Advertisers



Creatives

Top games by advertising



Vita Mahjong



Zen Color



Bingo Voyage

New hit games



Legend of
Elements

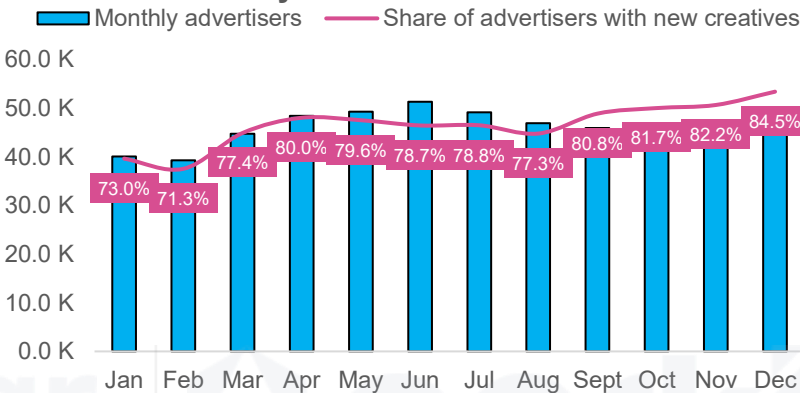


Top Tycoon:

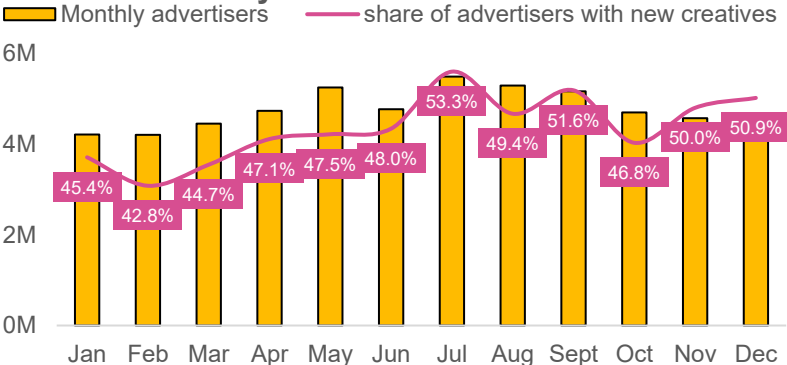


Umamusume:
Pretty Derby

Monthly Trends in Advertisers



Monthly Trends in Advertisers



Advertising Trends in Oceania Mobile Games

The scale of advertising spending is showing a slow growth trend, with popular products focusing on the educational and casual gaming market and incorporating niche IPs for refined user acquisition.

Mobile game
advertisers

YoY 22%

6.7W↑

Deduplicated creatives
for mobile games

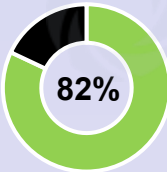
YoY 34%

12.8M↑

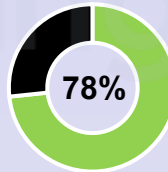
Share of video creatives

76.8%

Shares on iOS and Android



Advertisers



Creatives

Top games by advertising



Block Crush!



Paint by Number
Coloring Games



Match Villains

New hit games



Umamusume:
Pretty Derby

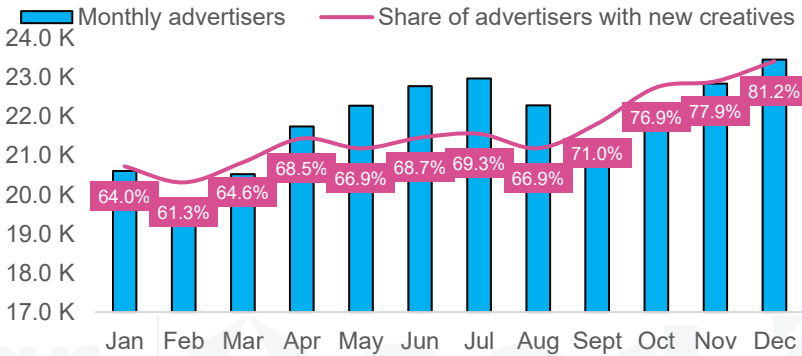


Pixel Rumble

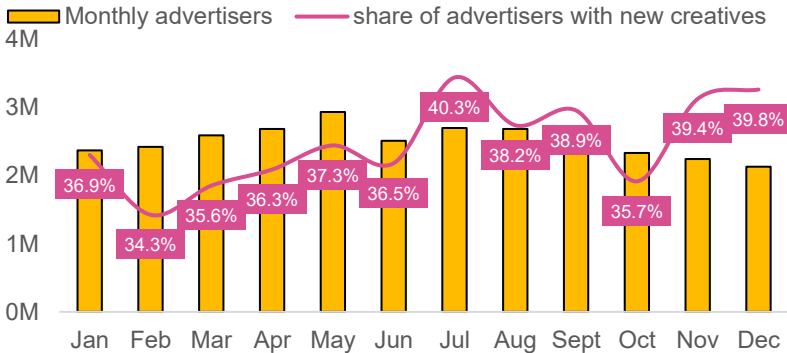


Dream Raiders

Monthly Trends in Advertisers



Monthly Trends in Advertisers



Advertising Trends in South America Mobile Games

Android users accounted for the largest share of advertisers and creative materials globally, with creative output increasing by a staggering 76%. Peak ad placements occurred in May and August, and the proportion of new creative materials also showed a steady upward trend.

Mobile game
advertisers

YoY 40%

11.8W↑

Deduplicated creatives
for mobile games

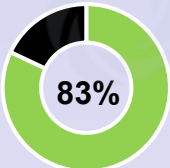
YoY 76%

19.6M↑

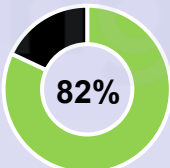
Share of video creatives

74.2%

Shares on iOS and Android



Advertisers



Creatives

Top games by advertising



Bible Word
Puzzle



Beast's Creed



Rise of
Kingdoms

New hit games



ACECRAFT

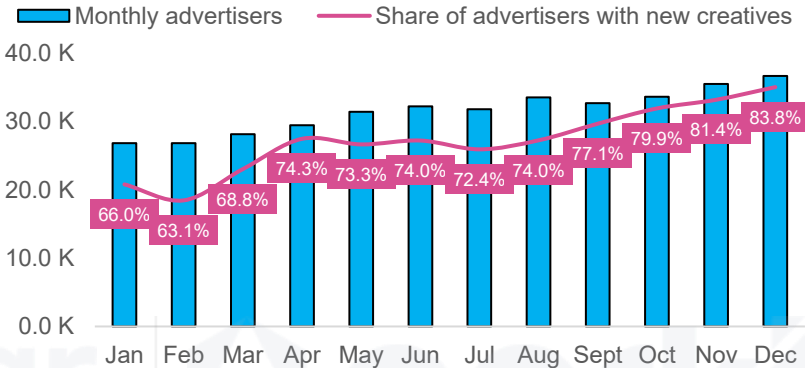


Huntopia

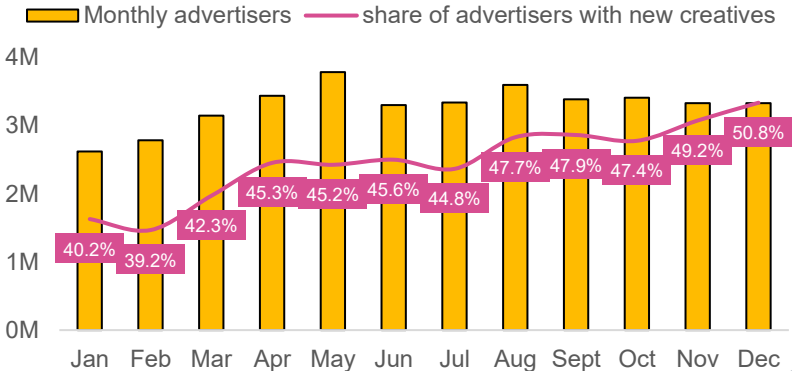


Street Motor
Rider Racing

Monthly Trends in Advertisers



Monthly Trends in Advertisers



07

Marketing Insights into Leading Mobile Game Advertisers

Marketing Analysis of a Popular New RPG

After it was first launched in Southeast Asia, the game grossed over \$100 million within 45 days and achieved 3 million downloads to top the list of global new idle RPGs in 2025.

MapleStory : Idle RPG

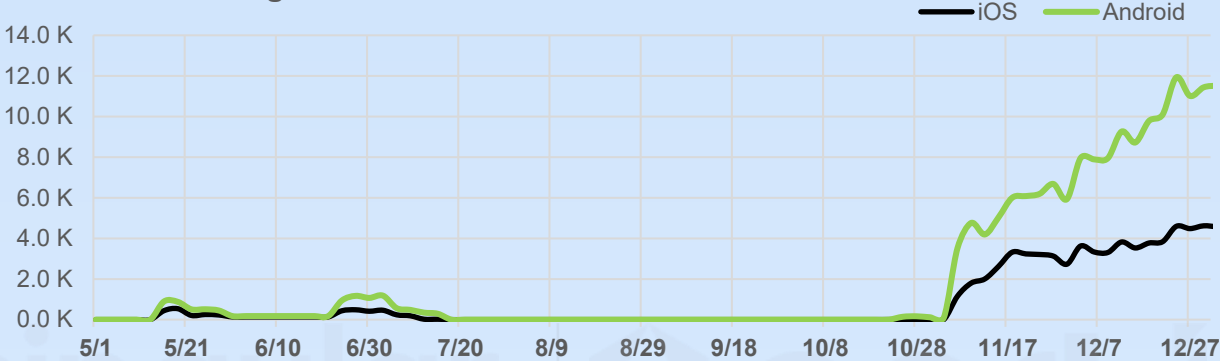
Idle RPG NEXON

Advertising Data

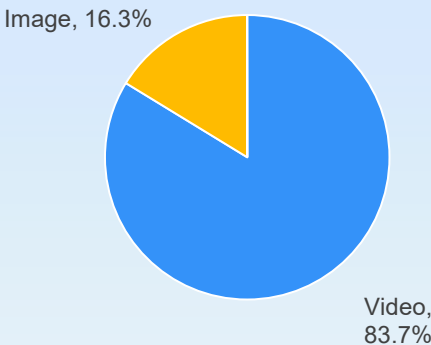
First advertising date: May 2025
Total deduplicated creatives: 38.7K



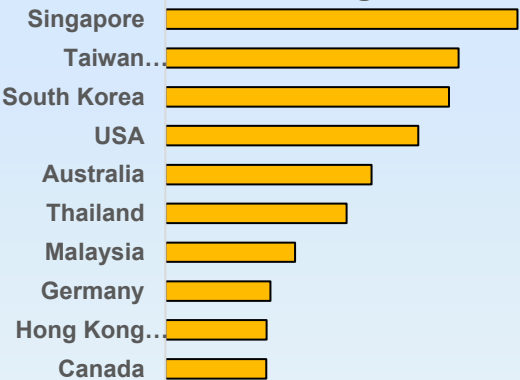
The game's ad creatives on iOS and Android in 2025



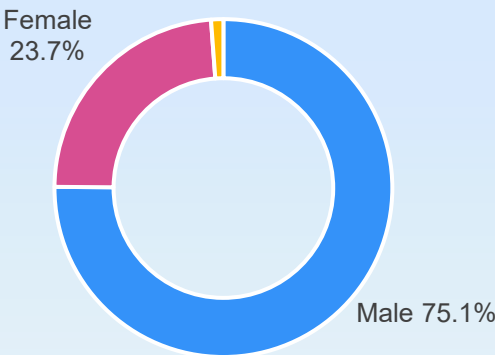
Share of creatives by type



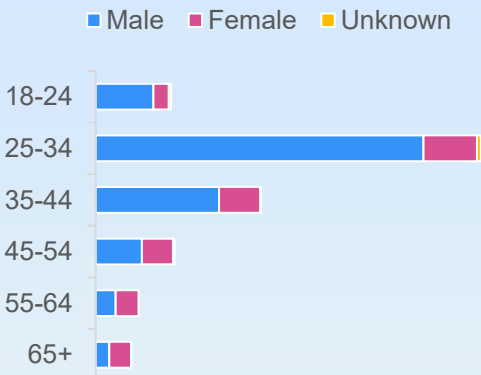
Top 10 countries/regions by advertising




Player Gender Distribution



Player Age Distribution



MapleStory : Idle RPG's Excellent Active Ad Creatives in 2025

Released on:  YouTube

Creative Data: Landscape; 640*360; 39s

Features:

As a mobile idle game based on a classic PC IP, the game can attract many players' attention by releasing nostalgic creatives. Visually, the creative faithfully recreates MapleStory's iconic pixel-art style.

The creative went viral thanks to its catchy BGM and gameplay introduction.

23.78M

**Estimated
Impressions**

44K

Total Popularity



Click the image to play

Marketing Analysis of a Popular New Casual Puzzle Mobile Game

The game was launched in June and started advertising in July. As the most surprising hit among all mahjong matching games in 2025, it remained one of the top 10 free board games in the US.

Mahjong Wonders™

Mahjong matching Nebula Studio

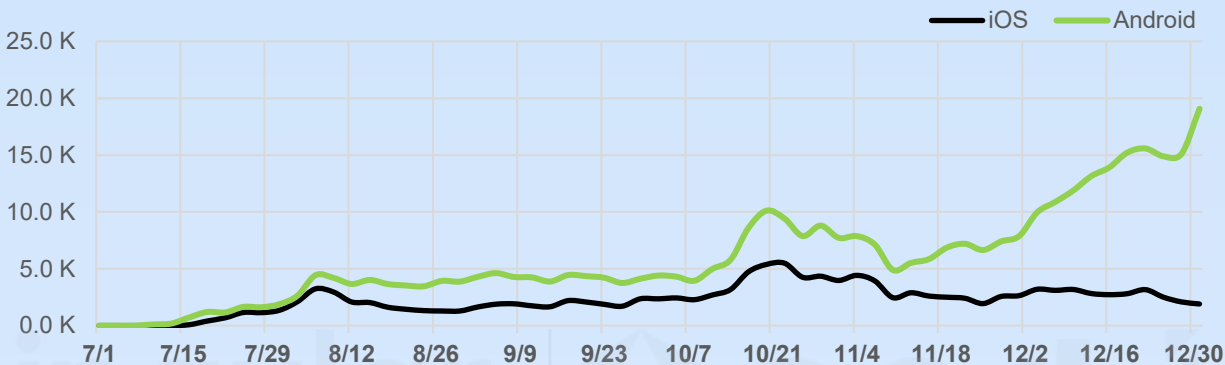
Advertising Data

First advertising date: July 2025

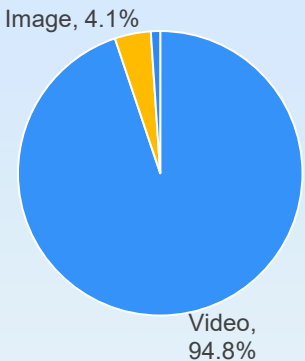
Total deduplicated creatives: 137K



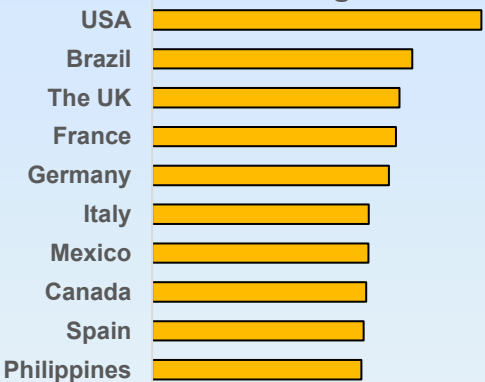
The game's ad creatives on iOS and Android in 2025



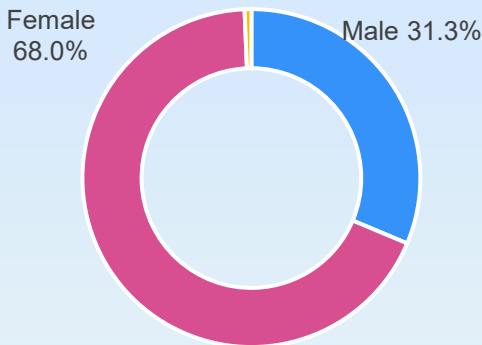
Share of creatives by type



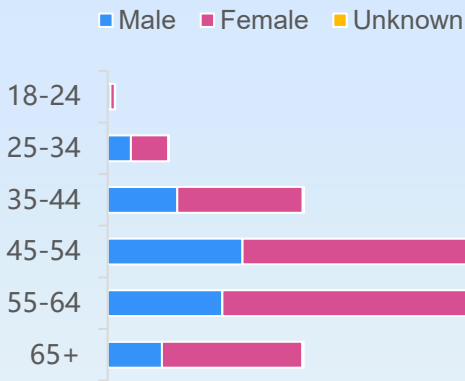
Top 10 countries/regions by advertising



Player Gender Distribution



Player Age Distribution



Mahjong Wonders™'s Excellent Active Ad Creatives in 2025



Released on: **facebook**

Creative Data: Portrait; 720*1280; 29s

Features:

The creative opens with a high-conflict narrative to capture attention and drive full-view completion, before transitioning into a voice-over introduction of the game.

The game mainly targets middle-aged and senior players and female players. So its creatives feature a slower-paced voice-over delivery and softer BGM to better align with audience preferences.

1.25M

Estimated Impressions

92K

Total Popularity



Marketing Analysis of a Popular New SIM Game

It was the second highest-grossing game going global in 2025, thanks to its great game quality and excellent advertising strategies. Its success significantly boosted overall attention among Chinese developers toward the “merge + X” genre.

Gossip Harbor

Plot + merge Micro Fun

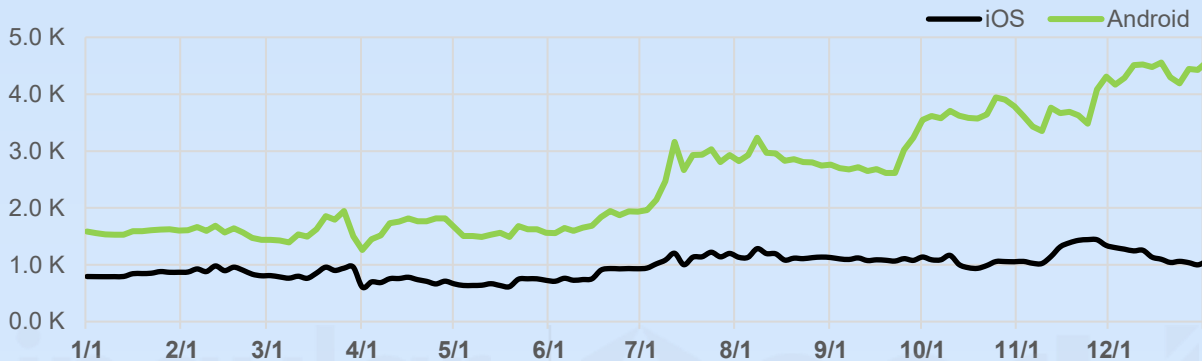
Advertising Data

First advertising date: June 2022

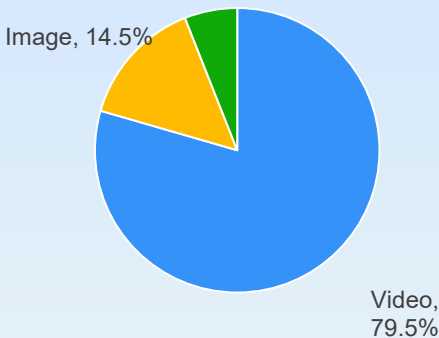
Total deduplicated creatives: 39K



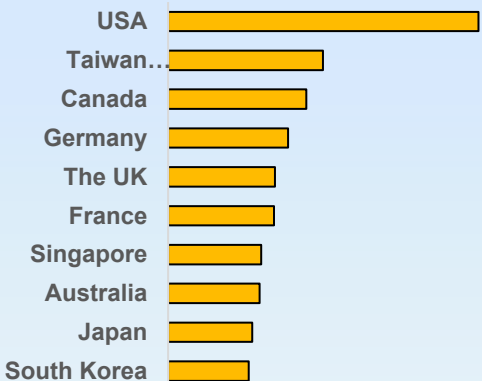
The game’s ad creatives on iOS and Android in 2025



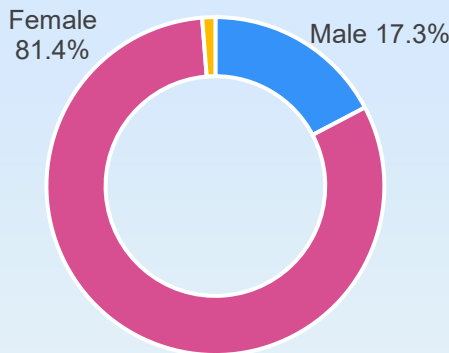
Share of creatives by type



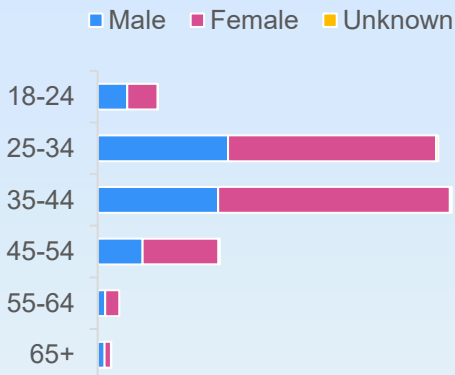
Top 10 countries/regions by advertising



Player Gender Distribution



Player Age Distribution



Gossip Harbor's Excellent Active Ad Creatives in 2025



Released on:  YouTube

Creative Data: Portrait; 720*1280; 29s

Features:

All the game's excellent creatives are plot-based and mainly about how a mother and her daughter survive a cold winter in a broken house. Such narratives strongly resonate with European and American audiences, as they reflect common survival and financial hardship scenarios.

The creatives also incorporate emotional elements such as pets and family conflict, further amplifying empathy and motivating users to download the game in order to "save" the mother and daughter in-game.

4.75M

**Estimated
Impressions**

53K

Total Popularity



Marketing Analysis of a Popular New SLG

The game was the most outstanding among all mobile games that were released in 2025. It was the first game in the popular “thronefall” market segment. The game’s marketing impressed and inspired many game enterprises.

Kingshot

SLG Century Games

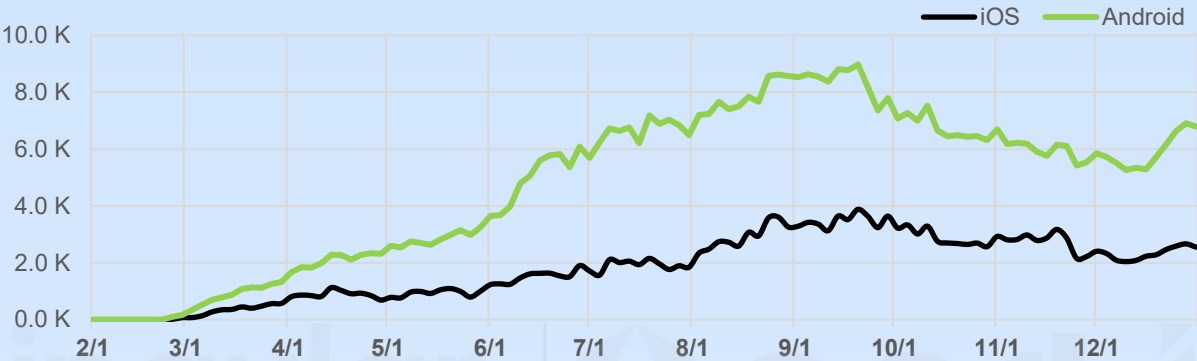
Advertising Data

First advertising date: Feb. 2025

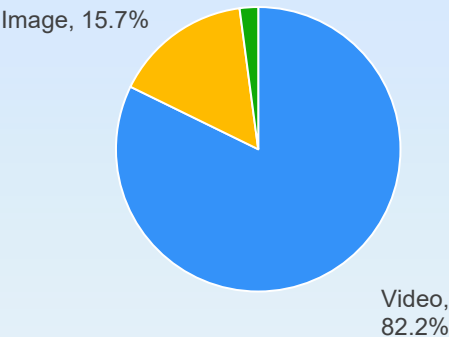
Total deduplicated creatives: 63K



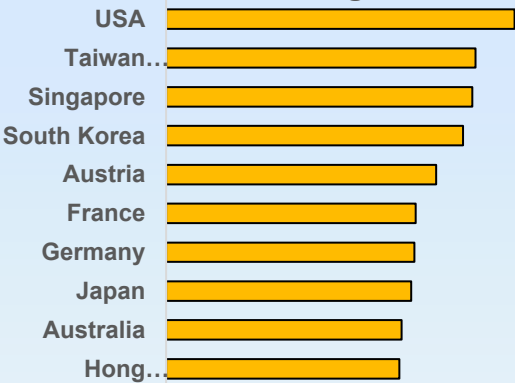
The game’s ad creatives on iOS and Android in 2025



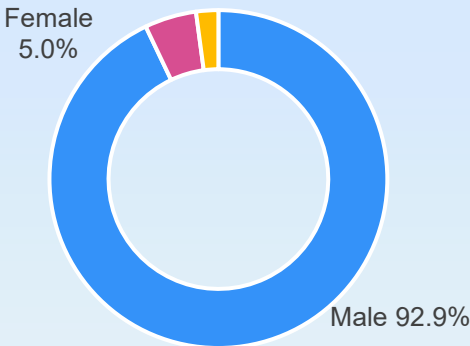
Share of creatives by type



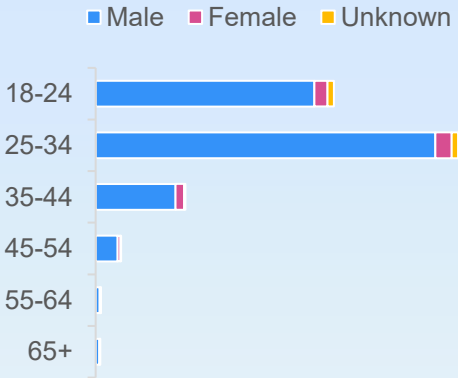
Top 10 countries/regions by advertising



Player Gender Distribution



Player Age Distribution



Kingshot's Excellent Active Ad Creatives in 2025



Released on:  Google Ads

Creative Data: Portrait; 360*240; 51s

Features:

AI-generated creatives are very commonly used for marketing SLGs. The following creative starts with content generated by AI: A girl is angry with her boyfriend who indulges in games and forgets her birthday. While the premise may seem unusual, it is highly engaging. The creative then transitions to Kingshot's mini-game. And it eventually achieved over 10 million impressions in total.

16.56M

**Estimated
Impressions**

96K

Total Popularity





Industry Insights

Funtap Games | Rzain Consulting | Two & Half Gamers | Gamigion | Playable Factory | AdQuantum | Mobidictum | asomehdi.com | Yodo1 |
Gamelight | Reforged Labs | Jampp

For me, **the real disruption in mobile gaming isn't about a new genre or technology, it's the structural shift to a Direct-to-Consumer (D2C) economy.**

For over a decade, we've played inside the 'walled gardens' of app stores. But 2026 represents a turning point. With the maturity of web shops and third-party payments, the power dynamic is finally shifting back to content creators.

This goes far beyond just saving on commission fees. It's about owning the player relationship. **The winners of this era won't just be the ones with the best gameplay, but the ones who can build a seamless ecosystem where the game app is just the entry point, not the entire journey.**

Phillips Dao
CEO at Funtap Games



The most significant 2025 market shift is **the validated rise of the "Purpose-Driven" vertical, moving from a niche to a demonstrably scalable investment thesis**. This isn't philanthropy; it's a consumer-led reprioritization toward products offering authenticity, tangible impact, and personal reconciliation.

The data is in the unit economics: apps with integrated real-world value show superior organic growth and retention, indicating higher Customer Lifetime Value (LTV) at lower CAC. The proof is in the breakout of titles like Longleaf Valley, whose core loop player progression directly funding real-world reforestation has driven sustained top charts presence. **This model successfully monetizes the growing desire for meaningful engagement beyond digital escapism.**

Simultaneously, we're seeing the explosive, capital-efficient growth of "Meaningful Middle" apps in verticals like neurodiversity support (e.g., dyslexia tools) and mindful parenting. These products don't chase broad virality; they achieve deep Product-Market Fit by solving acute, real-world problems, building highly-engaged, defensible communities with strong retention key indicators of a durable business.

This shift flags a major opportunity. **The market is rewarding business models that bundle digital engagement with real-world utility or positive externalities.** This creates powerful brand moats, ethical leverage, and community-driven growth loops that are incredibly defensible. The investment playbook is moving beyond pure entertainment to back teams that can architect these Authenticity-Utility-Impact stacks, as they are building the trusted, essential digital services of the next decade.

Claire Rozain
CEO at RZain Consulting





When talking about increasing blend of gameplay models and the evolution of genres, **The current problem that the market is facing is extremely high CPI costs in the main genres.** Therefore everything is being directed towards this one optimization vector, which is the reduction of CPI. That is why we have the market flooded with Fake Ads. This have of course evolved and currently even onboarding of these games is created based on the fake creatives mitigating the expectations problem. The other part of the equation being LTV has caused only some genres to be able to withstand this and establish themselves as de facto only gameplay engines capable of matching the current CPIs with their LTVs. Namely those are 4X, Match3 and Coin Looters. All covering the 3 biggest segments of the market. This masking process is currently under way in the coin looters genre as in 4X this has become mandatory and puzzle is also nearing this point of no return. Going forward it will be extremely important when choosing a game to build to understand the LTV potential of your gameplay systems as some systems will be literally phased out as not being able to compete in the current UA market.

Vietnam is currently the most promising new region to follow. There are already 5 big game studios established, with iKame leading the pack, but also very high ad monetization expertise. The teams are still very hungry and eager to learn and the workforce is still quite cheap. Compared to Turkey for instance, where it is quite consolidated now, development there got much more expensive. I expect Vietnam to grow similarly to Turkey's mobile gaming ecosystem in next 2-3 years. There is still not much M&A activity and they are waiting for their first unicorn, which I expect will be iKame based on their size. Government is also being quite positive towards the gaming sector, so this region is definitely a hot bed for game development now..

Jakub Remiar
Product Game Design Consultant at Two & Half Gamers





When it comes to market shifts and emerging trends in 2025, **the biggest surprise for me is that:**

"Mobile Ad Tech WARS are back!"

I was one of the thousands thinking 'Yeah, it's consolidated'.

Now? Quite an opposite...

Check my '*Ad Mediation Wars Are Back*' article on Gamigion. New Mediation players, new Ad Networks, new UA & AI tools...

New builders and "control back to publishers" narratives are emerging fast. Not even mentioning the AI side of it...

For the major trends shaping mobile gaming over the next 2–3 years, I'd sum it up as this:

"UA Marketing Arms Race? Going Nuclear."

Creative volume exploding. Iteration speed breaking sound barriers. AI hooks everywhere. AI playables turning into factories.

Not even mentioning about many publishers not caring about 'ethics'. Matej wrote about sexist ads on June'24, and nothing changed in 1.5 years.

People keep debating optimism vs pessimism. I'm neither. Just realist.

Truth Today?

Whoever builds a solid UA production machine wins distribution, even over "better" games.

AI makes creatives suuper easy to produce... and scaling hard to achieve.

Double edged sword here, (un)fortunately:

The barrier to enter has never been lower.

Barrier to succeed? Never been higher.

Ömer Yakabagi
Founder at Gamigion



One of the clearest shifts in UA today is being driven by the rapid improvement in AI-generated outputs. Creative production is being reshaped in both format and speed, pushing advertisers to reallocate budgets toward assets that can be produced faster and scaled more efficiently.

This acceleration is creating new pressure on UA teams. **Creatives must prove performance immediately.**

In this high velocity environment, playables are no longer a niche option. They are becoming a necessity. We saw this shift clearly in 2025. Today, many UA teams no longer launch creative packs without playables, and major ad networks increasingly recommend them as a standard format, not an optional one.

There are clear reasons behind this change. As networks have prioritized playables, the overall quality of playable experiences has improved significantly. Modern playables are more engaging and far better at reflecting real product value. As products ship faster, teams need formats that go beyond ROAS optimization and help validate core gameplay mechanics and messaging early.

AI-driven acceleration on the development side is setting similar expectations for UA: **shorter testing cycles, higher creative volume, and minimal tolerance for slow feedback loops.** This is shifting creative strategies away from high-production, slow-to-iterate assets toward formats that are flexible, fast, and signal-rich.

Looking ahead to 2026, the next major transformation is already approaching. AI-generated playables are expected to scale rapidly and become highly visible across the ecosystem. Just as AI is now essential for image and video production, and now in playable creation.

Ultimately, **UA success in 2026 will depend on the ability to produce, test, and learn at speed, and that will drive significant investment in AI-powered playable solutions.**

ORKUNCAN AYDIN
COO at Playable Factory



When asking about market shifts or emerging trends in 2025 that have surprised me, I'd say the most surprising update for the mobile market in 2025 was Meta's new algorithm, Andromeda, rolled out in Q3 2025. Andromeda changed how creatives on Meta are evaluated. The platform now interprets multiple similar creative variations as a single creative entity, which makes production more complex and pushes teams to elevate their creative approach once again.

The goal now should be to produce more creatives – faster, better, and at a lower cost – while **keeping them truly unique**. Simply increasing output without reducing costs will eat into profits and ultimately threaten business sustainability.

If asked about what user acquisition strategies or channels are delivering the most efficient growth in today's highly competitive market, I'd answer that Snapchat is still one of the most underrated ad platforms for both gaming and non-gaming apps. It now reaches over 900M monthly active users worldwide, with key markets including the UAE, Saudi Arabia, the USA, the UK, and France.

It's a great fit for mobile games. If you're aiming for at least 100 installs per GEO daily, have strong-performing creatives, and are planning to run acquisition campaigns, retargeting campaigns, or both, Snapchat is worth considering as part of your 2026 media mix.

With strong creatives and the right techniques, Snapchat Ads can easily become one of your go-to acquisition channels. For practical insights and tips, check out our latest **[Snapchat Guide: Creatives & User Acquisition Best Practices for Apps & Games 2026](#)**.

Julia Morozova
PR & Marketing team lead at AdQuantum



In the next 12 months, **I see the most promising expansion opportunities in Turkiye, Vietnam, China and the Gulf region. Each of these regions is evolving fast, and together they form a strong axis for mobile gaming growth.**

Turkiye remains one of the most competitive mobile gaming hubs in the world. The ecosystem continues to produce new hit studios such as Loom Games, and there is still a strong combination of talent, experience and execution speed. Turkish teams are very efficient in testing, iterating and scaling, which makes the country attractive both for investors and for publishers looking for high performing partners.

Vietnam is the fastest rising market. The recent news of NCSoft acquiring a majority stake in Indygo Group, is a strong validation of the region. It shows that global players, especially from South Korea, are now taking Southeast Asia seriously as a source of successful mobile gaming companies, particularly in the music and casual segments. Founders in Vietnam are hungry, product focused and increasingly globally minded, which will help the ecosystem move into higher value segments over the next few years.

China remains a global powerhouse in mobile content, live operations and monetization. Major Chinese companies are not only strong domestically, they are also expanding aggressively abroad. They will continue to play a central role in publishing, co development and investment, especially in emerging markets.

The Gulf region, led by Saudi Arabia and the UAE, is becoming a strategic hub as well. Governments are investing in gaming as part of their long term digital and entertainment vision, building infrastructure, events and funding mechanisms. This creates an attractive landing point for global mobile gaming studios that are looking for regional partners, capital and access.

Overall, Turkiye, Vietnam, China and the Gulf will remain highly relevant in the next 12 months, both in terms of where new opportunities appear and where strategic partnerships are formed.

Batuhan Avucan
Founder & Managing Director at Mobidictum



In 2025, **the most notable shift has been gamification expanding beyond games to become a primary driver of engagement, monetization, and investor interest.** For the first time, non-gaming apps surpassed mobile games in net in-app revenue in Q2 2025 (\$21.2B vs. \$19.8B), growing 24% year over year while game revenues remained largely flat. This reflects a structural change in how users engage with digital experiences.

High-growth non-gaming apps in EdTech, Fitness & Wellness, and Entertainment & Social are adopting mechanics such as streaks, XP systems, leaderboards, and progression loops to boost retention and long-term engagement. Between 2020 and 2025 YTD, over \$20.7B has been invested in gamified consumer apps, with EdTech alone accounting for roughly 40% of deal value and leading exits.

For mobile gaming, this demonstrates a broader industry lesson: **gamification is now a core growth and monetization strategy, not just a design feature.** Rising user acquisition costs and fierce competition for attention are driving studios to borrow from these principles to create more motivating, value-driven experiences. The most striking insight is that gamification is shaping where users spend, how capital flows, and which products succeed.

Looking ahead to 2026, **studios should focus on integrating deeper gamified systems into hybrid and casual games, emphasizing retention, social engagement, and long-term monetization.** Aligning game design with measurable user habits will be key to staying competitive in both gaming and adjacent consumer markets.

S. M. Mehdi Rizvi
Head of Growth at Factorial Studio (Private) Limited & Founder at asomehdi.com



Looking ahead, several major trends will shape the mobile gaming industry over the next 2–3 years:

Prediction 1: The End of "Rented" Audiences; The Rise of Integrated Community

We will stop just buying installs, and we'll started building real communities - players are looking for games that offer real connection and a sense of belonging from day one. Community will move from an external support channel (like Discord) to the primary growth engine embedded directly into the game loop. Studios will stop viewing players as "installs" to be bought and start viewing them as prospective members of a digital society.

Prediction 2: The Death of the Departmental Silo via "Growth Squads"

The traditional "hand-off" structure between Product and Marketing will fundamentally collapse, replaced by unified "Growth Squads" operating on a single, shared P&L We will remove the silos between Game Product and Marketing teams - Marketing needs to understand exactly why players leave on Day 3. And the Product team must understand exactly who Marketing is targeting with their ads.

Prediction 3: The "Hyper-LiveOps"

Mobile player attention will become far more selective and deeply rooted. Overwhelmed by choice, players will cease constantly searching for new experiences and instead will commit their time and social energy to just a few primary games on their device. However, their loyalty comes at a high price: an insatiable demand for novelty. These players now expect their chosen digital worlds to evolve constantly, mirroring the pace of social media feeds. They won't tolerate stale metas or repetitive events. This player-driven demand will force the industry into a "Hyper-LiveOps" state. The only way for a game to remain one of a player's chosen few is to deliver meaningful, fresh content nearly every single week!

Zdravka Dimitrova
Game Growth BD at Yodo1



When asking about the increasing blend of gameplay models and the evolution of genres, **game genres are converging. Hyper-casual games are fast and easy to start, but many players leave quickly; hybrid-casual and modern casual keep the simple gameplay, but add reasons to stay: upgrades, collections, levels, and events.**

This changes monetization and UA. On monetization, studios don't rely on just one method anymore. The combination of IAA and IAP is key as ads often work well early, and in-app purchases work better once players are more invested. Regarding UA, it's harder to grow with "cheap installs," because low-quality users quit fast. Teams need users who actually play and progress. That's where Gamelight fits well: we help publishers acquire users who are motivated to complete in-game goals, which usually leads to better retention and stronger long-term results.

In today's highly competitive market, **the most efficient UA today comes from channels that drive real engagement, not just installs.** That's why Rewarded UA is growing fast: users get rewards for completing meaningful in-game actions, like finishing onboarding, reaching a key level, or hitting a milestone. This aligns what users want (rewards) with what publishers need (users who actually engage), which leads to stronger retention and better ROAS.

At Gamelight, users choose games through our loyalty app and progress through task-based journeys. For publishers, that means acquisition built around engagement signals and milestone completion, supporting efficient growth.

Günay Azer
Founder at Gamelight



The biggest challenge in mobile gaming is **operationalizing AI without fracturing an organization**. While mobile gaming has thrived on data and optimization, seemingly like a ripe opportunity for AI, enterprise-level AI is rarely plug-and-play and requires buy-in from well beyond just leadership. Mobile apps represented a fundamental shift in how people interacted with the world around them. Phone screens became a primary interface not only for reaching each other but also for accessing companies and services. From gameplay to monetization to user acquisition, mobile games were at the forefront of this “revolution”. The mobile gaming industry was experts at leveraging data into flywheels.

But AI adoption has remained piecemeal. **Aside from legitimate concerns from creatives, adoption has been hampered by less than satisfactory performance by all-hype no substance early players.**

Especially at the practitioner level, testing AI tools is viewed as a burden and approached with wariness. For example, AI creative tagging is bread and butter at Reforged and its accuracy is something that I frankly take for granted. However, we’ve run into multiple conversations where previous vendors have left a bad taste with poor performance, leading to more time and resources needed from both sides. Often, the exponential performance improvements of AI just in the last year are still overshadowed by the failures of early exuberance in 2023.

At Reforged, we believe that the challenge of reconciling top-down initiatives with frontlines usage comes down to trust and belief. AI is not magic and won’t work perfectly out of the box, so we have to be laser-focused on solving actual pain points instead of adding complexity to the day-to-day workloads of marketing teams. Of course, we also hope industry folks look at AI with fresh eyes and give it a fair shot!

Dennis Yeh
Head of Growth at Reforged Labs



The most efficient growth for Gaming and iGaming advertisers today is found by looking beyond the traditional 'walled gardens.' As we analyze the trends from 2025 that are shaping 2026, the reliance on SANs is being balanced by a more sophisticated use of Mobile DSPs. This transition is driven by the need for transparency and incremental scale; when SANs hit a saturation point, the programmatic ecosystem offers a path forward. This is reflected in current industry rankings like Singular's Quarterly Trends Reports, where DSPs consistently featured among the top-ranked channels for percentage growth in 2025—signaling a strategic budget reallocation across the board.

Throughout 2025, we also saw **CTV continue its evolution into a high-performance engine.** This channel offers a unique opportunity for Gaming and iGaming advertisers to scale their reach across premium inventory with a superior canvas for storytelling—driving and tracking conversions directly through their MMP. Advertisers are increasingly treating this as a natural extension of their mobile strategy; in fact, we've seen CTV drive a 40% uplift in installs when running alongside mobile campaigns. The 'big screen' is no longer a luxury; it's a strategic move to secure incremental scale in a hyper-competitive industry. Heading into 2026, we expect this channel to keep maturing with solutions like CTV-to-Web, **allowing advertisers to drive high-intent mobile web traffic and diversify their conversion funnels.**

Benjamin Waters
VP APAC at Jampp



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 80 channels and nearly 70 countries and regions worldwide, and have captured a total of over 1.6 billion advertising data, with over 1 million ad data being updated by the hour each day. Based on such huge data, we can gain insights into the advertising market trends.

2. Data Cycle and Indicators

Overall date range of the report: Jan –Dec 2025

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

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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

THANKS

2026 GLOBAL MOBILE GAMING MARKETING TRENDS WHITE PAPER

Special Invitation:  funtapgames