2026 Southeast Asia Mobile Game Marketing Report

Presented by SocialPeta × Gamota

SocialPeta | GAMOTA GAME IS GOOD

Contents

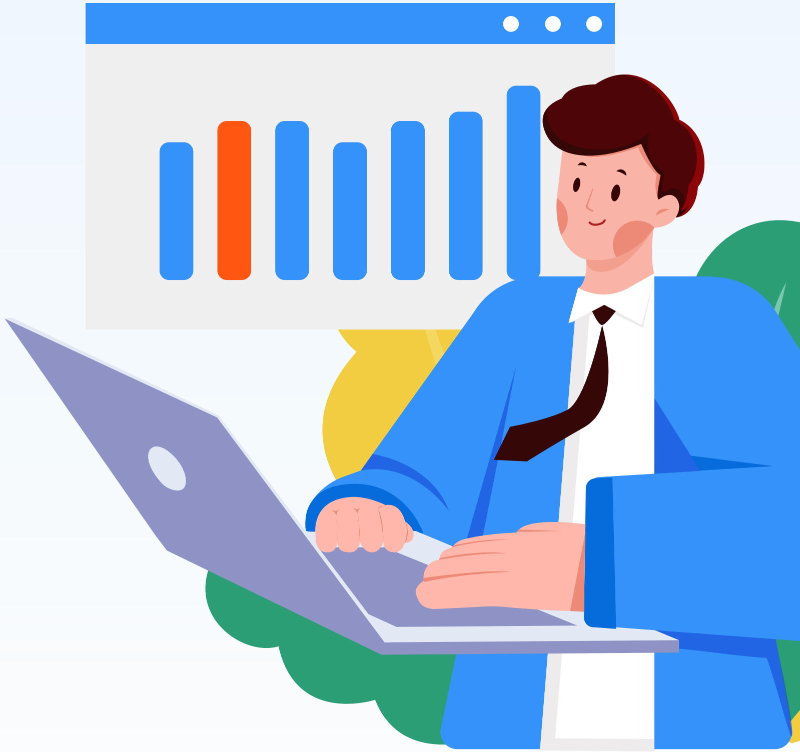
ABOUT SocialPeta

Leading Global Advertising Intelligence Platform, Powered by AI to Identify Winning Creatives Faster

SocialPeta helps you analyze competitors' advertising data and discover insights and inspiration across channels, media platforms, and advertisers.

Our database covers more than 70 countries and regions and over 80 global advertising channels, including Facebook, X, YouTube, TikTok, and Unity. It contains over 1.7 billion ad creatives and is updated hourly.
Using five key metrics—Duration, Impressions, Popularity, Engagement, and Creative Score—SocialPeta enables you to quickly identify high-performing active creatives and gain real-time insights for your marketing strategy.

Backed by an extensive global database and experience serving thousands of mobile app clients, SocialPeta provides mobile marketers with practical, data-driven methodologies to create apps and games that users love.



6M
APP Advertisers

1.7B
APP Creative

1.2M
Daily Updates

Website: www.socialpeta.com

ABOUT GAMOTA

GAME IS GOOD

Gamota is one of Vietnam’ s leading game publishers

Gamota is one of Vietnam’ s leading game publishers, with deep local expertise in the Vietnamese mobile game market. Since 2013, Gamota has helped international studios reach local players through localized publishing, market entry strategy, LiveOps, community activation, and monetization execution.

Beyond publishing, Gamota provides Vietnam market intelligence through industry reports and market analysis, helping partners understand local player behavior, genre performance, payment context, regulations, and growth opportunities.

With hands-on experience across **RPG, Strategy, MMORPG, Card Collection, and MOBA**, Gamota aims to be a trusted co-publishing partner for global studios entering and scaling in Vietnam.

35M+
GAMER BASE

~200
GAME TITLES

50+
INTERNATIONAL PARTNERS

Website: www.gamota.com

01

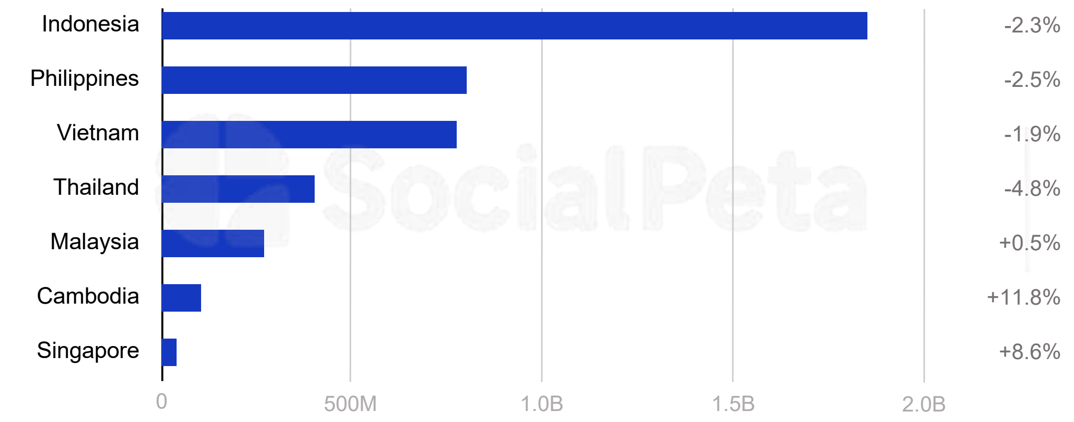
Market Overview and Trend Insights

Southeast Asia Market Downloads, Revenue & Mobile Game Advertising Insights

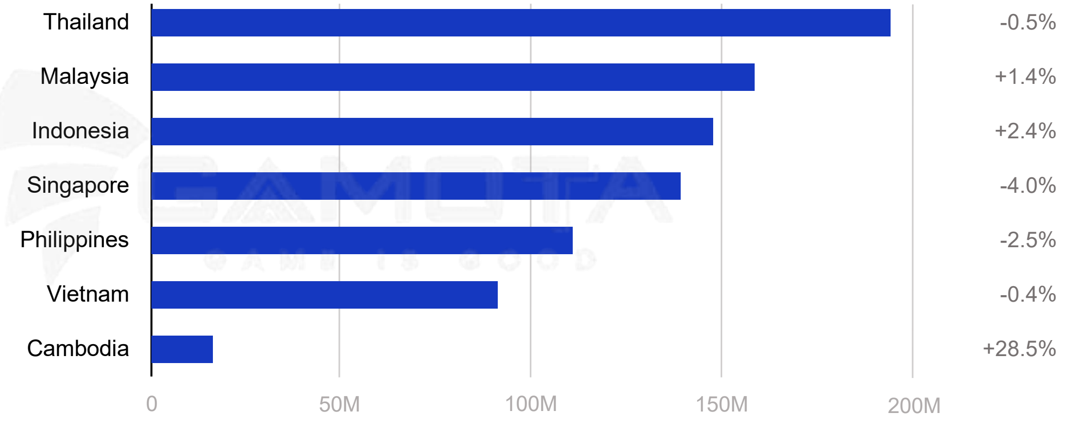
SEA Mobile Game Market Overview

H1 2026 data suggests that selected SEA markets follow distinct scale-led and value-led profiles, making market choice a question of fit rather than ranking alone.

H1 2026 Mobile Game Downloads



H1 2026 Mobile Game IAP Revenue



Scale reflects reach, not spending depth

Indonesia leads downloads, with Vietnam and the Philippines forming the next scale tier. Their lower IAP ranks show that reach does not ensure equal spending depth.

IAP leadership follows a different structure

Thailand leads IAP revenue, while Malaysia and Singapore monetize strongly from smaller download bases, suggesting denser payer activity.

Market Selection Needs Multiple Metrics

Market priorities should reflect product needs: scale-led titles require reach, while high-value midcore games benefit from stronger spending density.

Source: Multiple mobile market intelligence sources; Gamota analysis.
Date Range: 2026/1~2026/6

2026 Mobile Game Advertising Trends in Southeast Asia

- **Monthly active mobile game advertisers in Southeast Asia grew 19.7% YoY and 5.2% MoM, signaling continued market expansion.**
- **New advertisers accounted for just 14.3%, with growth largely driven by existing advertisers scaling up investment and intensifying competition.**

2026 Y Monthly Average Advertisers in Rotation

46.2K

YoY 19.7%↑

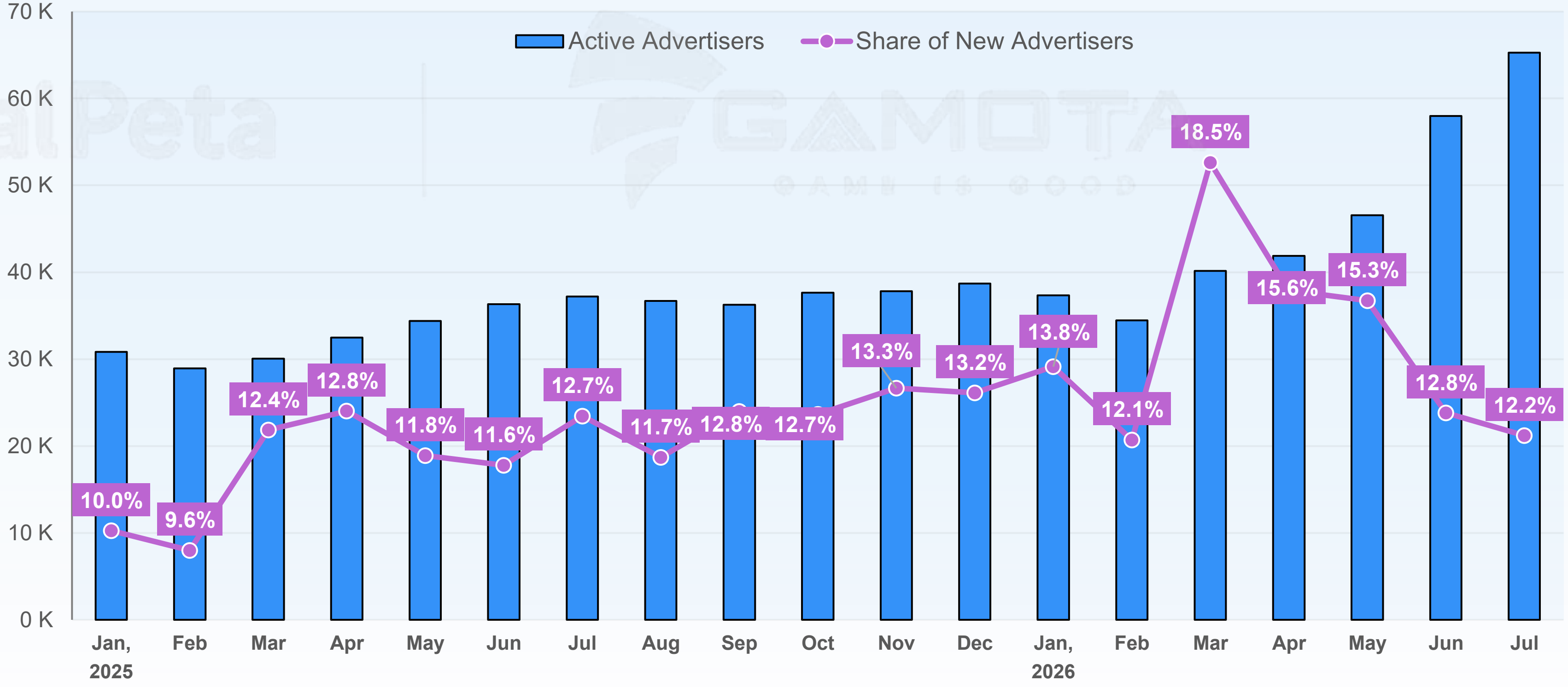
MoM 5.2%↑

2026 Y Share of Monthly New Advertisers

14.3%

Monthly New Advertisers:6.5K

Southeast Asia Mobile Game Monthly Advertiser Trend



Source: SocialPeta,
Date Range：2025/1~2026/7

2026 Mobile Game Advertising Trends in Southeast Asia

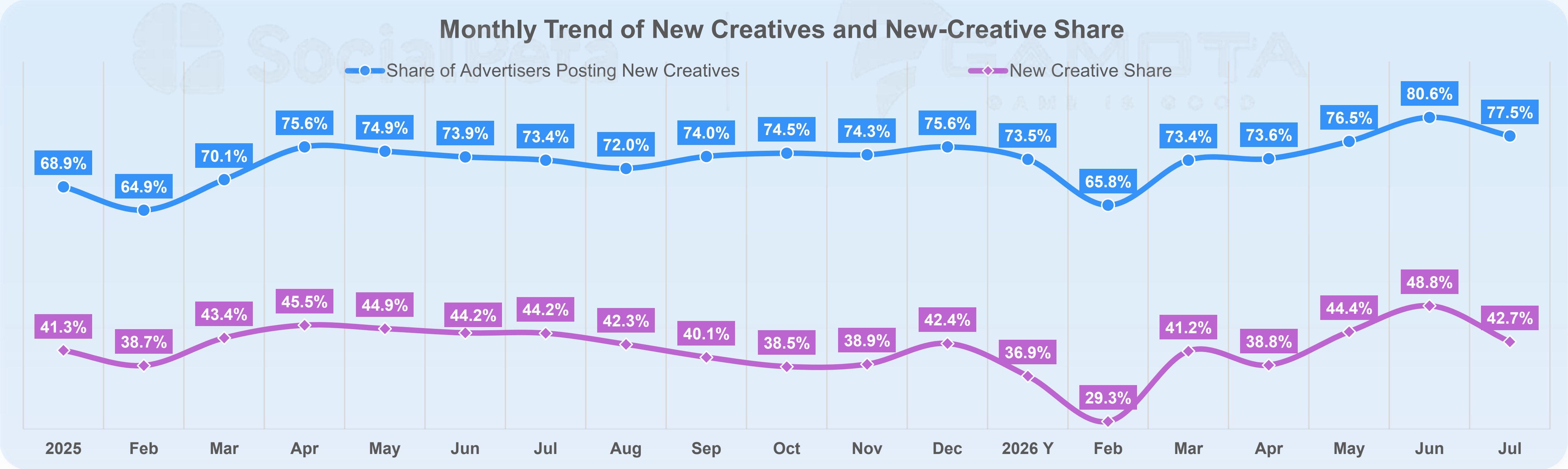
- **74.4% of advertisers launch new creatives each month, maintaining high creative activity.**
- **New creatives account for 40.3% monthly, with the market still dominated by creative reuse and iteration on proven assets.**

74.4% YoY:2.74%↑

Monthly Share of Advertisers Posting New Creatives in 2026

40.3% YoY:2.87%↓

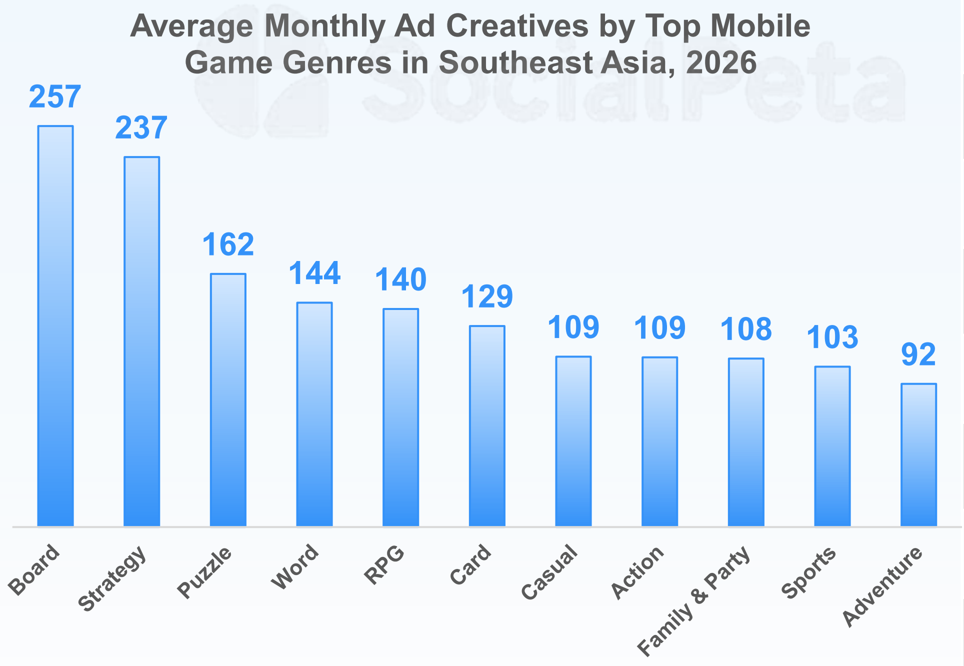
Monthly Share of New Creatives in 2026



Source: SocialPeta,
Date Range：2025/1~2026/7

2026 Marketing Trends of Popular Mobile Game Genres in Southeast Asia

Board, strategy, and puzzle games show higher ad activity, while strategy and RPG titles drive ongoing creative iteration through progression, combat, and live operations.



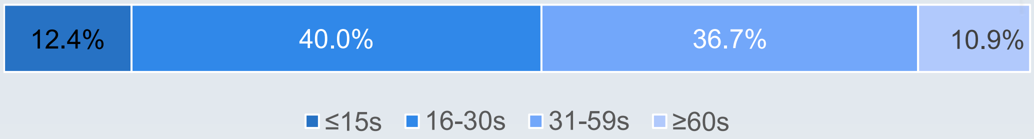
Category	Advertiser Share	vs. Global	Category Name	Creative Share	vs. Global
Casual	28.03%	8.98%	Casual	25.18%	2.04%
Casino	23.13%	-24.63%	Puzzle	16.61%	2.27%
Puzzle	11.92%	3.60%	Casino	11.94%	-11.35%
Simulation	7.96%	3.18%	RPG	10.56%	2.32%
RPG	5.76%	2.45%	Strategy	9.52%	3.10%
Action	4.94%	1.89%	Simulation	6.56%	0.58%
Strategy	3.84%	1.43%	Action	5.54%	1.15%
Arcade	3.12%	0.77%	Board	3.84%	0.54%
Adventure	2.67%	0.84%	Card	2.36%	-0.16%
Card	1.72%	0.38%	Adventure	2.06%	0.15%

Source: SocialPeta,
Date Range：2026/1~2026/7

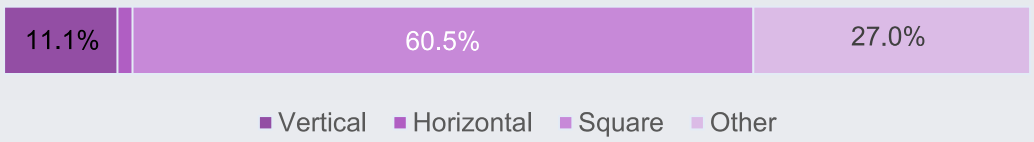
2026 Mobile Game Advertising Trends in Southeast Asia

Video creatives dominate Southeast Asia mobile game advertising, accounting for 73.7% of total creatives.
With major differences in network quality across the region, mid-length videos better balance loading costs and gameplay communication, especially in markets like Indonesia and the Philippines.

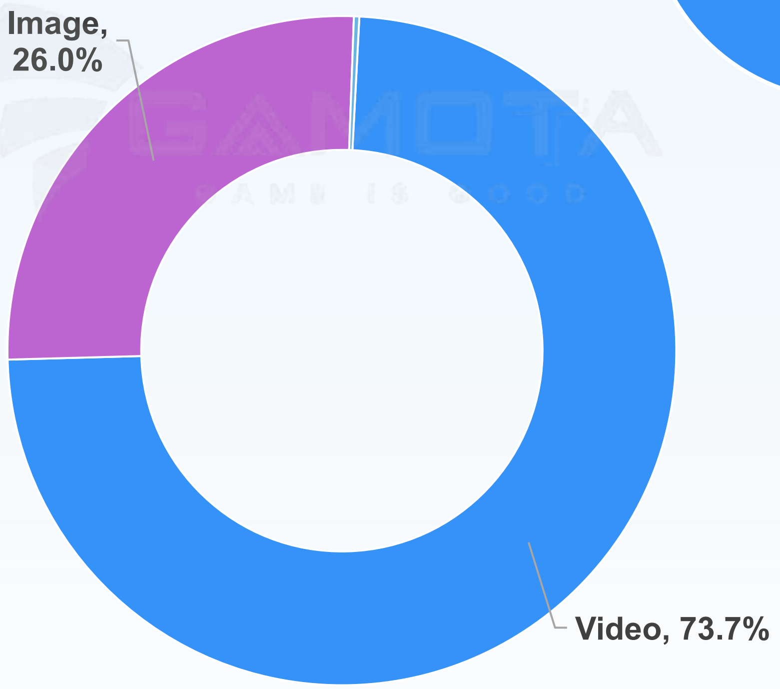
1 Video Creative Duration

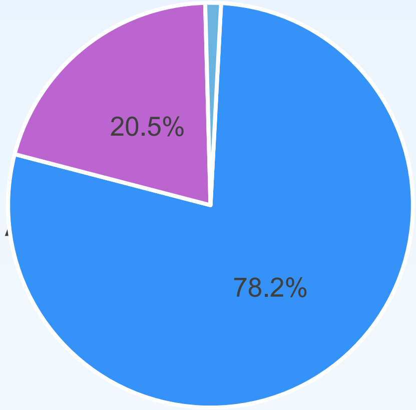


2 Image Creative Format

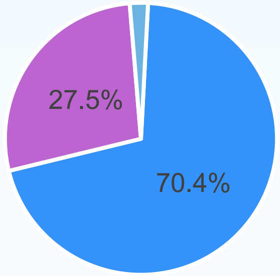


Creative Format Share of Southeast
Mobile Games, 2026





2025 Y



2024 Y

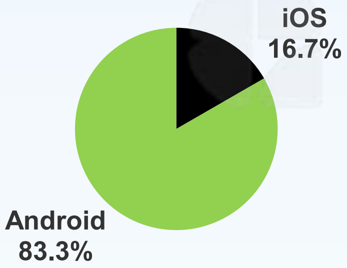
Shares of Southeast Asia Mobile Game Advertisers & Creatives on iOS & Android in 2026

Advertisers: Android remains the main UA platform in Southeast Asia, accounting for **83.3%**. iOS advertiser share for midcore and hardcore games is about **1.5×** that of casual games.

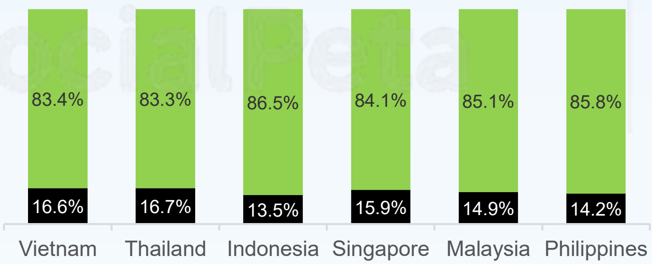
Creatives: iOS accounts for **23.7%** of creatives versus **16.7%** of advertisers. Midcore and hardcore games invest about **2×** more in iOS creatives than casual games, indicating stronger creative competition.

Shares of mobile game advertisers on iOS and Android

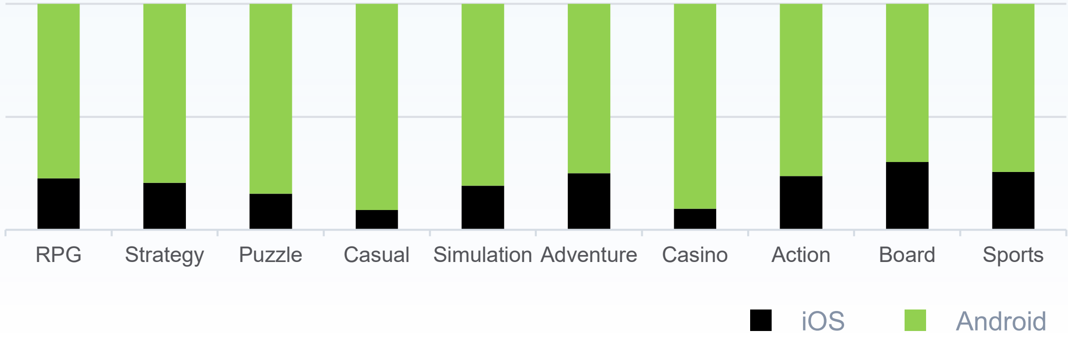
Overall Advertiser Share



Advertiser Share by Country

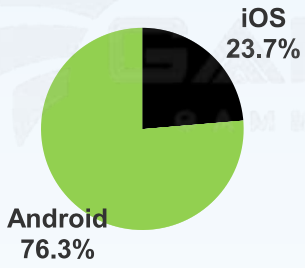


Shares of Advertisers on iOS & Android by Top Genre

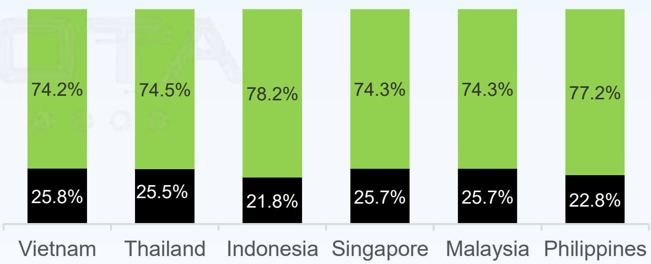


Shares of Creatives for Mobile Games on Android and iOS

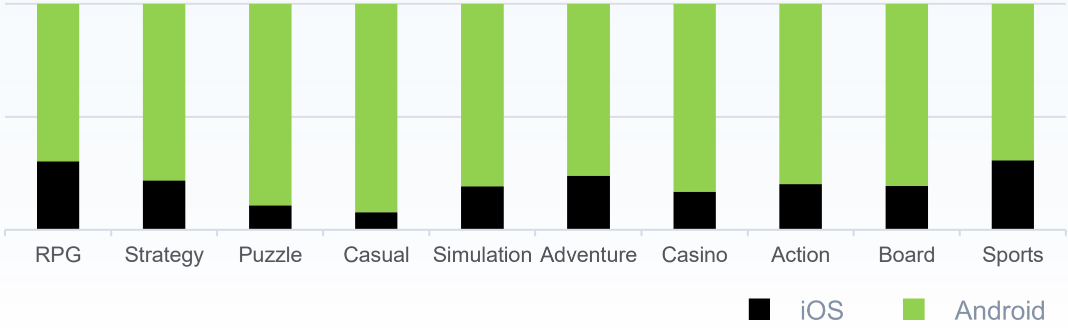
Overall Creative Share



Creative Share by Country



Shares of Creatives on iOS & Android by Top Channel



Source: SocialPeta
Date Range：2026/1~2026/7

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Top 20 Mobile Games by Advertising in Southeast Asia, 2026

iOS

1	Tile Explorer	Oakever Games
2	Ragnarok: The New World	Gravity Game Vision Limited
3	Vita Mahjong	Vita Studio
4	Zen Word®	Oakever Games
5	Gardenscapes	Playrix
6	Amaze GO!	Oakever Games
7	Eternal Sword Pact	Leniu Games
8	Dragon Traveler	GameTree Entertainment
9	Dawnbound Heroes	Storm Interactive Entertainment Limited
10	Samkok: Blood Oath	LUMENCODE
11	3D World Puzzle	Tran Dinh Hung
12	Wulin Master	Vietnam Interactive Television JSC
13	Kingshot	Century Games PTE. LTD.
14	Mystery Town: Merge Games	Cedar Games Studio
15	Savage Survival: Jurassic Isle	Phantix Games
16	Top War: Battle Game	RiverGame
17	Thế Giới Hoa Viên Của Tôi	Gen Z Media Company Limited
18	Foundation: Galactic Frontier	FunPlus International AG
19	Match Villains	Good Job Games
20	Lands of Jail	SINGAPORE JUST GAME TECHNOLOGY PTE. LTD.

Android

1	Mystery Town: Merge Games	Cedar Games Studio
2	Dark War Survival	Omnilojo Pte Ltd
3	Tile Explorer	Oakever Games
4	Vita Mahjong	Vita Studio
5	Zen Word®	Oakever Games
6	Mahjong Blast	Nebula Studio
7	Jigsawcard Solitaire Puzzle	Oakever Games
8	Block Crush!	Wonderful Studio
9	Higgs Games Island	Higgs Games
10	Honor of Kings	Level Infinite
11	Last Z: Survival Shooter	Omnilojo Pte Ltd
12	Amaze GO!	Oakever Games
13	Block Blast!	Hungry Studio Studio
14	Ragnarok: The New World	Gravity Game Vision Limited
15	Blackjack	Word Search Puzzle Games
16	Township	Playrix
17	Gardenscapes	Playrix
18	Lands of Jail	SINGAPORE JUST GAME TECHNOLOGY PTE.LTD.
19	Epic Route:Ahead	Stockpicker Inc
20	Eternal Sword Pact	Leniu Games

Source: SocialPeta
Date Range：2026/1~2026/7

02

Vietnam Market Lens

Vietnam Market Overview: From Market Scale to Policy Landscape

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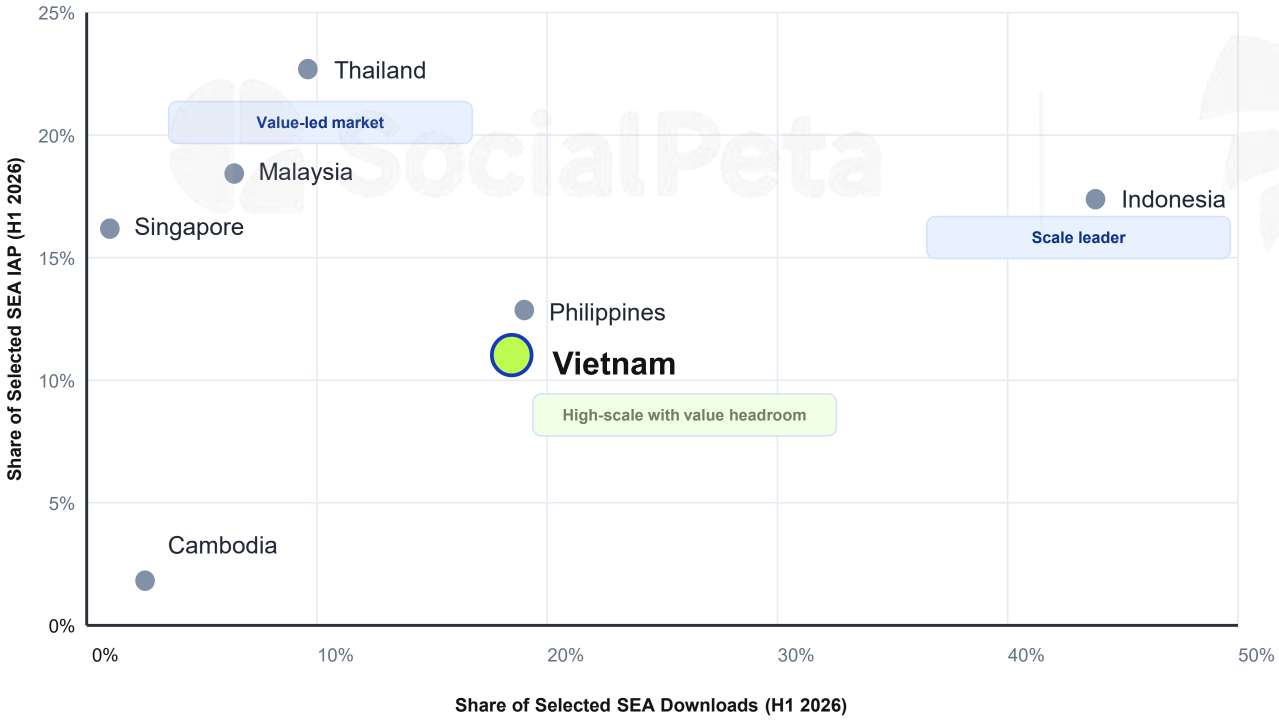
Why Vietnam Matters in Southeast Asia

Vietnam combines proven acquisition scale with meaningful monetization headroom, making it a compelling market for deeper analysis.

Selected SEA Markets: Download vs. IAP Revenue Share, H1 2026



VIETNAM AT A GLANCE

Share of selected SEA downloads	18.3%
Share of selected SEA IAP revenue	10.6%
Download ranking	Top 3

WHY VIETNAM WARRANTS A CLOSER LOOK

- Proven acquisition scale: Vietnam generated nearly one-fifth of selected SEA downloads, placing it among the region's largest mobile game acquisition markets.
- Meaningful monetization headroom: Vietnam's IAP share trails its download share, suggesting further value potential, especially beyond store payments.
- Local execution can unlock value: Recognizable themes, deep progression, visible value, and localized payments can convert scale into durable player value.

Vietnam offers proven scale and credible monetization upside, warranting a deeper local lens.

Source: Multiple mobile market intelligence sources; Gamota analysis.
Date Range: 2026/1~2026/6

Vietnam Market Entry Context

Vietnam's market-entry fundamentals are strengthening, but sustainable success increasingly depends on compliance-ready, locally adapted, and technology-enabled execution.

Policy & Regulation

Supportive direction, tighter execution

- Resolution 80 elevates games as a cultural industry and exportable creative product.
- Decree 147/2024 sets stricter rules on licensing, player verification, minors, and virtual items.
- Decree 174/2026 and personal data protection rules strengthen penalties, privacy, and governance.

Market Entry Implication

Build licensing, identity, privacy, and payment compliance into the launch plan from day one.

Economic Conditions

Growth with affordability considerations

- GDP grew 8.18% YoY in H1 2026, supported by strong domestic activity.
- Average CPI rose 4.38%, keeping affordability relevant for pricing decisions.

Market Entry Implication

Calibrate price points, bundles, payment options, and monetization cadence to local purchasing power.

Tech & Infrastructure

Wider connectivity, smarter operations

- 110.5M mobile broadband subscriptions and 91.3% smartphone usage as of Apr 2026.
- 5G subscriptions reached ~23 million (as of February 2026), and continue to expand alongside 4G coverage.
- AI-enabled operations can support localization, QA, customer support, Live-Ops, creative production, and UA.

Market Entry Implication

Optimize for 4G/5G delivery, with AI supported by human review, IP safeguards, and data governance.

Social & Community

Expanding talent, local execution advantage

- Game-focused university programs are expanding the local talent pipeline.
- Competitive and social games remain prominent in download and revenue rankings.
- Community behavior and cultural relevance shape retention and engagement.

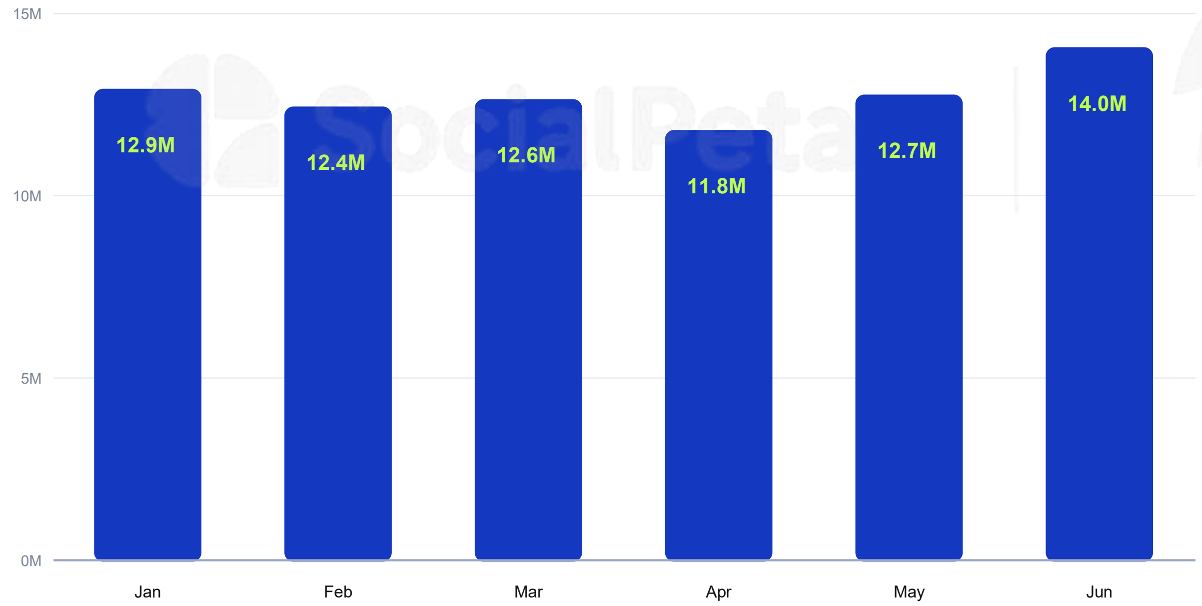
Market Entry Implication

Strengthen local Live-Ops, community management, cultural adaptation, and publisher–studio collaboration.

Vietnam Download Trend in H1 2026

Vietnam's mobile game downloads regained momentum toward mid-year, suggesting stronger product-market fit in the late-H1 release mix.

Vietnam Mobile Game Downloads, H1 2026



76.5M
H1 downloads

–9.7%
YoY downloads

14.0M
June downloads

Highest Month
June 2026

The demand base remained stable

Vietnam generated 76.5M downloads in H1 2026, with monthly volume staying relatively stable before the May–June rebound.

Rebound reflected stronger product-market fit

May–June gains aligned with stronger Sim Sports, Shooter, and familiar RPG formats, supported by football IP, nostalgia, and recognizable themes.

Pipeline quality mattered more than volume

Titles with recognizable themes, familiar gameplay, and category demand were more likely to convert launch visibility into downloads than a volume-led approach.

Source: Multiple mobile market intelligence sources; Gamota analysis. Data cover midcore titles officially available and compliant in Vietnam.
Date Range：2026/1~2026/6

Vietnam Revenue Trend in H1 2026

Vietnam's mobile game revenue grew 7.5% YoY, while a stable monthly baseline suggests resilient value capture across H1.

Vietnam Mobile Game Total Revenue, H1 2026

$177.0M
H1 total revenue

+7.5%
YoY revenue

$28.7M – $30.6M
Monthly range

Stable Baseline
Across H1 2026

Revenue growth outpaced acquisition

Revenue grew 7.5% YoY despite lower downloads, suggesting that H1 growth was not primarily driven by higher acquisition volume.

A resilient monthly baseline

Monthly revenue remained between $28.7M and $30.6M throughout H1, with performance distributed relatively evenly across the six months.

Visible value may support payment conversion

In progression-led segments, purchases offering power, rank, collection, or status gains may support conversion; local payments can also reduce transaction friction.

Source: Multiple mobile market intelligence sources; Gamota analysis. Total revenue includes estimated IAP and localized payment channels; Data cover midcore titles officially available and compliant in Vietnam.
Date Range: 2026/1~2026/6

Download-Led Subgenres

Established categories continued to anchor H1 download scale, while Sim Sports, Shooter, and Idle RPG emerged as notable growth pockets.

Top 10 Subgenres by Downloads, H1 2026

Subgenre	Downloads	Share	YoY
Battle Royale	10.05M	**13.1%**	-22.3%
Sim Sports	8.68M	**11.3%**	+242.2%
4X Battle	7.94M	**10.4%**	-15.4%
Sandbox	6.68M	**8.7%**	-26.9%
MMORPG	6.57M	**8.6%**	-47.8%
MOBA	6.46M	**8.4%**	-26.4%
Idle RPG	5.99M	**7.8%**	+21.4%
Team Battle	4.62M	**6.0%**	-30.5%
Avatar Life	4.44M	**5.8%**	-46.0%
Shooter	3.78M	**4.9%**	+181.0%

85.3%
Top 10 Share

34.9%
Top 3 Share

Growth broadened the mix without displacing leaders

- Established scale: Battle Royale and 4X Battle stayed in the Top 3 despite lower YoY downloads, showing leadership can persist through softer acquisition.
- Selective growth: Sim Sports, Shooter, and Idle RPG were the only Top 10 growers, consistent with familiar themes, gameplay, and accessible progression.
- Broader mix: Faster-growing categories gained relevance, but established genres retained the largest download pools—indicating diversification rather than a structural shift.

Source: Multiple mobile market intelligence sources; Gamota analysis.
Date Range：2026/1~2026/6

Revenue-Led Subgenres

H1 revenue remained concentrated in three large categories, while growth broadened through both traffic-supported and revenue-led gains.

Top 10 Subgenres by Total Revenue, H1 2026

Subgenre	Revenue	Share	YoY
MMORPG	$29.9M	16.9%	+1.0%
Battle Royale	$26.8M	15.2%	+2.6%
4X Battle	$19.3M	10.9%	-1.8%
Team Battle	$16.3M	9.2%	+17.2%
MOBA	$13.5M	7.6%	-35.1%
Idle RPG	$13.4M	7.6%	+40.2%
Avatar Life	$9.7M	5.5%	+6.2%
Shooter	$9.2M	5.2%	+579.4%
Sim Sports	$8.5M	4.8%	+80.7%
Auto Chess	$8.2M	4.6%	-21.9%

87.4%
Top 10 Share

43.0%
Top 3 Share

H1 revenue combined a stable core with two growth paths

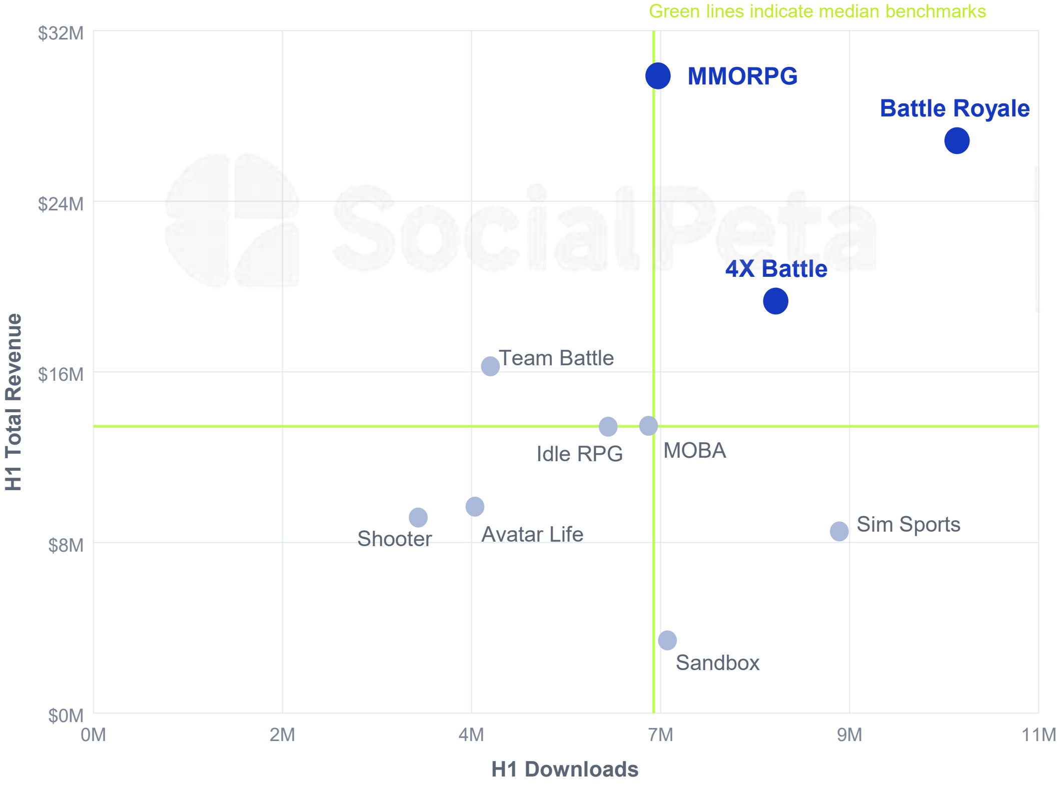
- A stable revenue core: MMORPG, Battle Royale, and 4X Battle generated 43.0% of H1 revenue, with only modest YoY changes despite their different operating models.
- Traffic-supported growth: Sim Sports, Shooter, and Idle RPG expanded across both downloads and revenue, suggesting that broader acquisition contributed to their H1 gains.
- Revenue-led growth: Team Battle revenue rose despite lower downloads, suggesting that its revenue growth was less closely tied to download expansion.

Source: Multiple mobile market intelligence sources; Gamota analysis.
Date Range：2026/1~2026/6

Traffic-to-Value Matrix

H1 category positions suggest four distinct traffic-to-value profiles rather than a single path from scale to revenue.

Traffic-to-Value Matrix by Subgenre, H1 2026



Scale + Value Leaders

Battle Royale, 4X Battle, MMORPG

These categories combine above-median downloads and revenue, consistent with competitive communities, long-term progression, and accumulated player investment.

Traffic-Led

Sim Sports, Sandbox

Downloads over-index relative to revenue, making conversion a key priority. Sim Sports entered this profile following strong YoY expansion, signaling broader reach but continued value headroom.

Value-Led

Team Battle, MOBA

Revenue over-indexes relative to downloads, suggesting that retention and competitive depth may matter more than scale alone. MOBA shifted into this profile as downloads softened, while revenue remained marginally above the benchmark.

Emerging / Niche

Idle RPG, Avatar Life, Shooter

These categories remain below both benchmarks. Idle RPG and Shooter stand out as growth watchlist categories, but have yet to reach established scale.

Source：Multiple mobile market intelligence sources; Gamota analysis. Quadrants use median H1 downloads (6.52M) and total revenue ($13.45M) across the 10 subgenres shown. Positions are relative within this peer set, with classifications based on unrounded values. YoY shifts use the corresponding period-specific medians.
Date Range：2026/1~2026/6

Top Games by Downloads

H1 download leaders reflect three pathways: competitive communities, familiar propositions, and participatory social play.

Top 10 Games by Downloads, H1 2026

1	Free Fire MAX	8.08M
2	FC Mobile VN	6.95M
3	Roblox VN	6.68M
4	Garena Liên Quân Mobile	4.36M
5	Play Together VNG	2.78M
6	Thế Giới Hoa Viên Của Tôi	2.32M
7	Crossfire: Legends	2.16M
8	Mobile Legends: Bang Bang FT	1.75M
9	Return to Childhood – Life Sim	1.66M
10	Thời Đại Anh Hùng	1.60M

Multiple demand pathways shaped the H1 ranking

- Competitive communities remained a major acquisition engine: Four of the Top 10 were competitive titles, indicating that ranked play, team identity, and established player networks continued to support discovery and repeat engagement.
- Familiar propositions reduced discovery friction: A recognizable football experience helped propel *FC Mobile VN* to #2, illustrating how familiar interests and intuitive play patterns can reduce product education.
- Participatory social play broadened demand: Four social or sandbox-oriented titles reached the Top 10, showing that creation, self-expression, co-play, and accessible daily routines can scale beyond core competitive audiences.

The Top 10 captured 50.1% of H1 downloads, indicating that demand remained distributed across multiple propositions rather than dominated by one format.

Source: Multiple mobile market intelligence sources; Gamota analysis.
Date Range：2026/1~2026/6

Top Games by Revenue

H1 revenue was less concentrated than downloads, with value spread across competitive, social, RPG, and sports titles.

Top 10 Games by Total Revenue, H1 2026

Rank	Game	Revenue
1	Free Fire MAX	$16.7M
2	Play Together VNG	$9.7M
3	PUBG Mobile VN	$9.5M
4	Garena Liên Quân Mobile	$8.7M
5	Đấu Trường Chân Lý	$7.7M
6	Crossfire: Legends	$7.3M
7	OMG 3Q	$5.2M
8	Nghịch Thủy Hàn	$4.0M
9	LMHT: Tốc Chiến	$3.9M
10	Be A Pro: Football	$3.9M

Different forms of player investment supported H1 revenue

- Competitive identity anchored the ranking: Six of the Top 10 were competitive titles, suggesting that ranked progression, team identity, seasonal systems, and visible status remained important monetization foundations.
- Social ownership created meaningful value: A non-combat social title ranked #2, showing that avatars, collections, persistent spaces, and self-expression can generate strong spending without combat-first design.
- Familiar themes broadened the revenue mix: RPG and sports titles complemented the competitive leaders, indicating that recognizable settings, visible progression, and squad development provide additional routes to monetization.

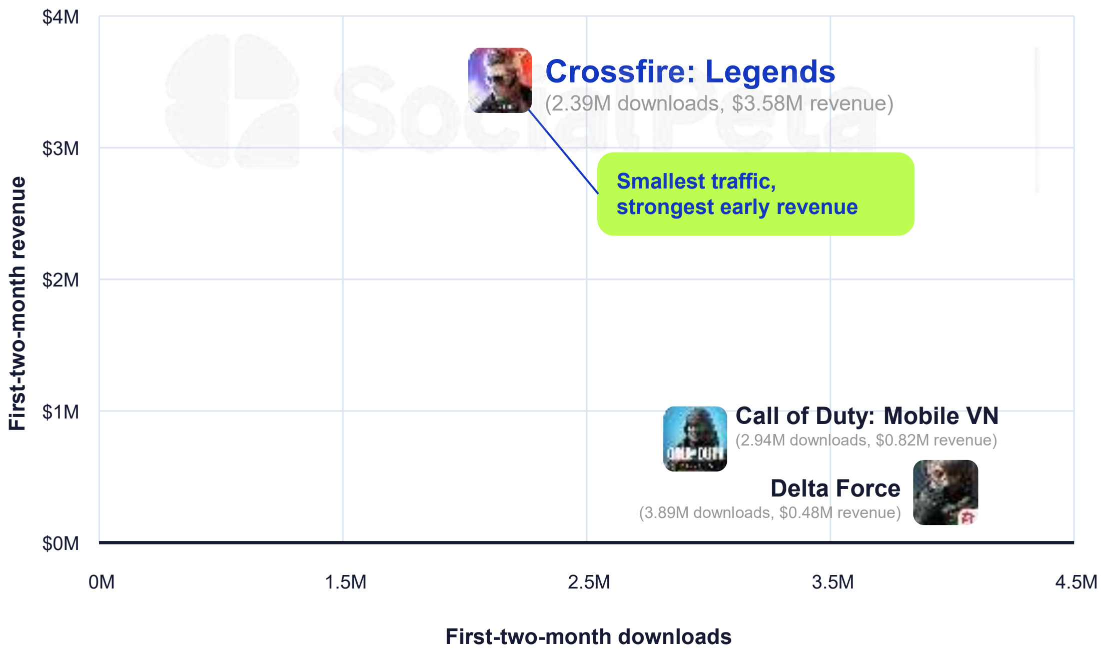
The Top 10 accounted for 43.2% of H1 revenue, below their 50.1% share of downloads, while no title exceeded 10%—indicating a distributed mix of monetization models.

Source: Multiple mobile market intelligence sources; Gamota analysis.
Date Range: 2026/1~2026/6

Crossfire: Legends: Performance Proof

Crossfire: Legends **generated the strongest early revenue among comparable tactical shooters despite having a relatively small download base.**

First-Two-Month Downloads vs. Revenue



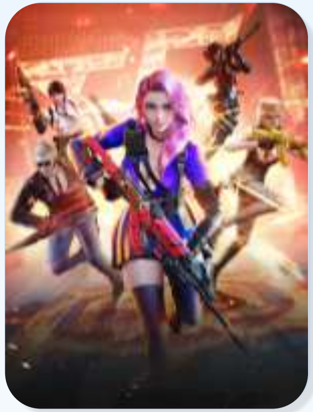
H1 2026 Snapshot

$7.32M
H1 Revenue

2.16M
H1 Downloads

#6
by Revenue

#7
by Downloads



Why it stands out

- Smaller traffic, stronger revenue: The title generated substantially more launch-window revenue than higher-download tactical shooters.
- A monetization gap was already visible: Comparable tactical shooters generated meaningful launch traffic but substantially lower revenue.
- Demand converted quickly: The result suggests that an established tactical-shooter audience was willing to spend when the proposition matched familiar expectations.

Source: Multiple mobile market intelligence sources; Gamota analysis. First-two-month results compare early-stage performance; KPI cards reflect Crossfire: Legends' H1 2026 performance.
Date Range: 2026/1~2026/6

Why Crossfire: Legends Converted Value

Three product strengths help explain how *Crossfire: Legends* converted relatively modest launch traffic into unusually strong early revenue.

Familiar Tactical Identity

Classic bomb-defusal rules, multi-route maps, and short time-to-kill created a recognizable tactical loop for players familiar with the *Crossfire* and *Counter-Strike* tradition.

Value created:
Lower learning friction

High-Stakes Social Mastery

Fast matches, punishing mistakes, and close team coordination made skill expression highly visible, creating clutch moments and shared memories within player groups.

Value created:
Status and shared memories

Visible & Functional Value

Weapon and character skins could offer combat-stat or supplementary effects, while stickers, charms, and visual customization strengthened ownership and collection appeal.

Value created:
Utility and personalization

Source: Gamota analysis.
Date Range：2026/1~2026/6

Play Together: Acquisition Durability

***Play Together* remained a Top 5 download title in H1 2026, showing how accessible social play can sustain market relevance years after launch.**

Long-Term Acquisition Durability

2021
Global launch
International release; early Vietnamese players accessed the game.

2022
Official Vietnam Launch
Localized launch strengthened local relevance and accessibility.

2023–2025
Sustained local traction
Ongoing events, updates, and repeatable social loops supported continued user interest.

H1 2026
Continued Top-Tier Performance
The title ranked #5 by downloads and #2 by revenue in H1 2026.

2.78M
H1 Downloads

#5
Download Rank

$9.67M
H1 Revenue

#2
Revenue Rank

What sustained user acquisition

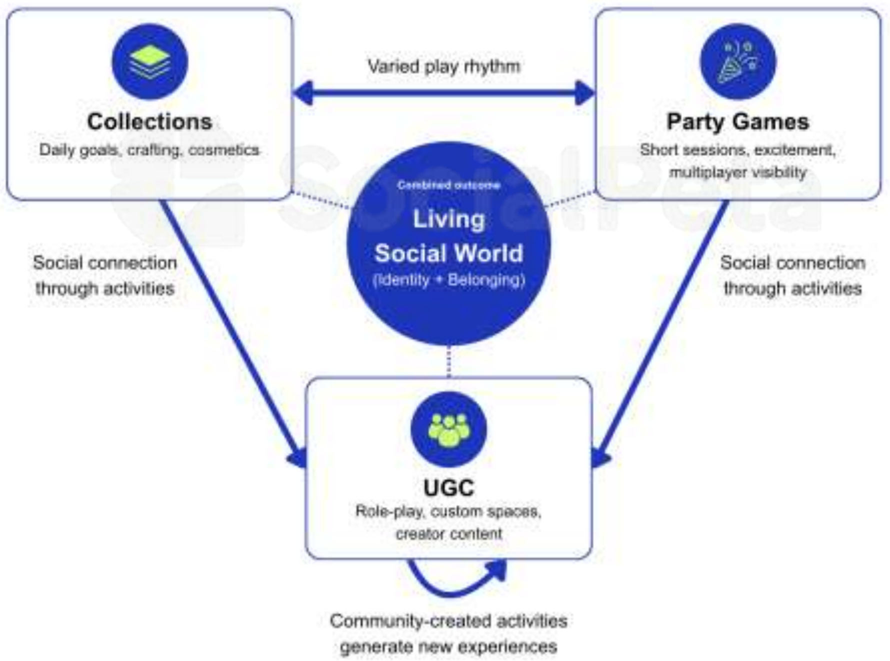
- Accessible presentation: Broad visual appeal and relatively accessible device requirements lowered trial friction.
- Familiar social fantasy: Avatars, friendship, shared spaces, and self-expression created an intuitive social proposition.
- Multiple entry points: Collecting, decorating, mini-games, role-play, and co-play gave users varied reasons to enter and return.

Source: Multiple mobile market intelligence sources; Gamota analysis.
Date Range: 2026/1~2026/6

How Play Together Sustains Acquisition Relevance

Play Together **sustains acquisition relevance by balancing long-term collection goals, short-session excitement, and community-created social experiences.**

The *Play Together* Social Engagement System



Avatar and home customization reinforce identity, ownership, and self-expression across the system.

Collections

Long-term collection goals create daily purpose and repeat engagement. Crafting, cosmetics, and visible progress strengthen ownership and identity.

Party Games

Short, varied matches introduce excitement and change the pace of play. Multiplayer competition supports repeat participation.

UGC

Player-created role-play, spaces, and scenarios deepen social connection. Community-led activities continuously generate new experiences.

Source: Gamota analysis.
Date Range: 2026/1~2026/6

What the Two Cases Suggest for Vietnam

***Crossfire: Legends* and *Play Together* illustrate two distinct but complementary paths to performance in Vietnam: converting familiar value from a smaller traffic base and sustaining broad reach through repeatable social systems.**

Dimension	 **Value-Led Route** *Crossfire: Legends* *Tactical Shooter*	 **Scale-Led Route** *Play Together* *Life Sim*
Primary Objective	Convert a relatively modest acquisition base into strong early revenue.	Sustain broad acquisition and long-term market relevance beyond launch.
Core Product Engine	Familiar tactical play, visible team mastery, and functional and cosmetic value.	Collections, Party Games, UGC, and co-play create varied reasons to return.
Player Value	Clear utility, status, and ownership give players understandable reasons to spend.	Identity, belonging, and self-expression make participation easy to repeat.
Observed Signal	First-two-month revenue materially exceeded that of comparable tactical shooters with higher downloads.	Ranked #5 by downloads and #2 by revenue in H1 2026, nearly four years after its official Vietnam launch.

Shared Foundation: Local familiarity × repeatable engagement × visible value × sustained execution

These cases illustrate two viable performance pathways in Vietnam. Publishers should clarify whether scale or value is the primary objective, then align product, community, and monetization systems accordingly.

Source: Multiple mobile market intelligence sources; Gamota analysis.
Date Range: 2026/1~2026/6

Implications for International Publishers

Vietnam's H1 pattern suggests a selective H2 playbook: begin with a clear scale or value thesis, then align product design, monetization, and local execution around the same player motivation.

1 Enter through the right performance route

- Acquisition-led entry: Sim Sports is the clearest H1 growth pocket, while social and sandbox leaders show how participatory play can sustain reach over time.
- Value-led entry: Battle Royale, 4X, and MMORPG remain established scale-and-value categories; Team Battle suggests a retention-led route.

2 Design around one recognizable value engine

- H1 leaders gave players clear reasons to return or spend. Competitive products surfaced mastery, rank, utility, and status; social products deepened collection, identity, co-play, and self-expression.
- Events, rewards, bundles, and payment access should reinforce one core motivation, not operate as disconnected systems.

3 Build local execution into the entry model

- Publishers without established in-market capabilities should engage a Vietnamese co-publishing partner before launch.
- A local partner can align compliance, payments, and local execution. Broader UA should follow localized validation of the intended scale or value engine.

Choose the route, prove the value engine locally, and scale through execution built for Vietnam.

Source: Multiple mobile market intelligence sources; Gamota analysis.
Date Range：2026/1~2026/6

03

Marketing Insights from Top Mobile Game Advertisers in Southeast Asia

Southeast Asia Marketing Cases: Leading MMOs, Chinese Mini Games & Unconventional SLGs

SocialPeta | GAMOTA GAME IS GOOD

Chinese flower-growing mini-games Perform Strongly in the Vietnam market

Thế Giới Hoa Viên Của Tôi GEN Z MEDIA

180 Days+

Cumulative Advertising Days

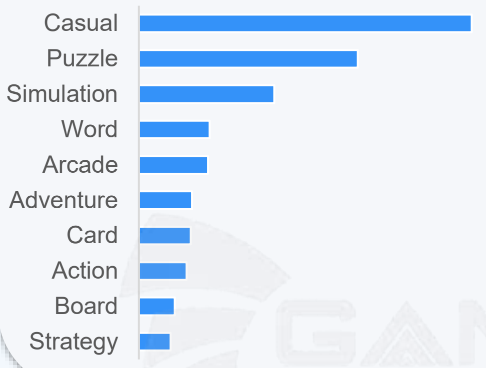
iOS:2026 Y2 M
Android:2026 Y2 M

15K

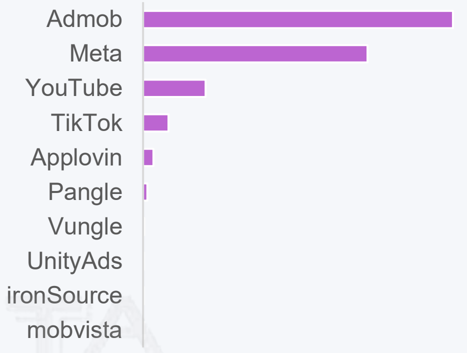
Cumulative Creative Volume

iOS:57.0%
Android:43.0%

Creative Distribution by Media

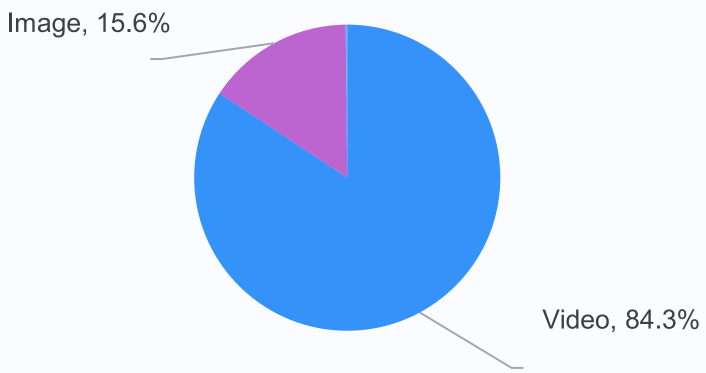


Advertising Channel Distribution



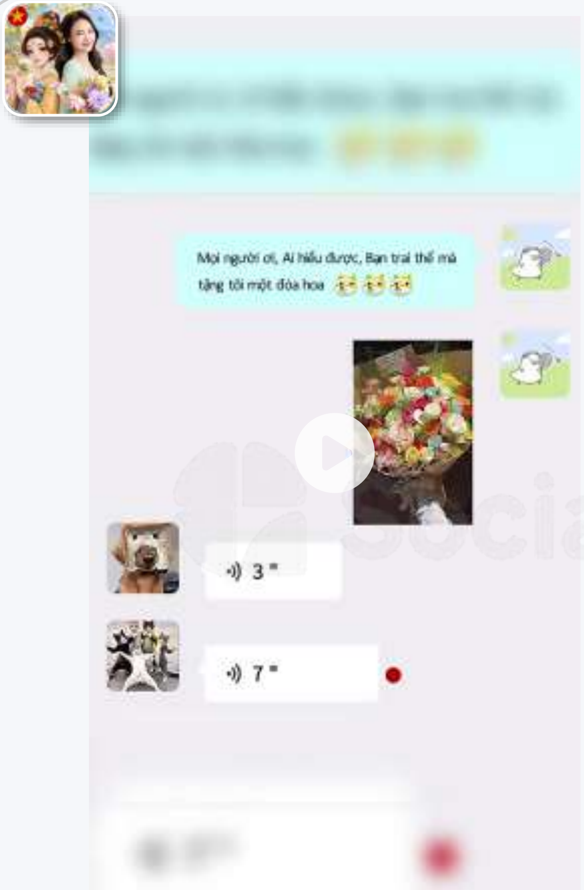
Creative Volume by Platform in 2026

Share of Creatives by Format



Source: Ad data from SocialPeta-Advertiser Analysis module;
Date Range: 2026/2~2026/7

Creative Analysis | Thế Giới Hoa Viên Của Tôi



Video Creative | Vertical 720x1280 | ~41s

Gameplay Recording Simulation

2D Chinese Ink-Style Casual & Relaxing Authentic Experience

Click to Play

Advertising Overview (SocialPeta)

390K	299	86K	51 Days
Impressions	Popularity	Creative Score	Duration

Advertising Channels APPLOVIN

Creative Data Vertical 720 x 1280

Language Vietnamese

Target Market Vietnam

Game Genre Casual / Simulation / Collection & Growth

Art Style 2D Chinese Ink / Bright / High-Saturation

Creative Type Gameplay Recording

Theme Tags City Building / Collection & Progression / Romantic

First Seen 2026-04-08

Creative Structure & Key Highlights

Chat-Style Hook → Gameplay Showcase → Bouquet + Download CTA

Highlight 1: Chat-Style Hook — Opens with a familiar chat interface to create instant immersion and improve early retention.

Highlight 2: Ink Art + Real Flowers — Combines 2D Chinese ink visuals with real bouquets, creating strong contrast and a distinctive visual identity.

Highlight 3: Relaxing Emotional Appeal — Blends romance and relaxation to engage Southeast Asian female casual gamers and encourage organic sharing.

Highlight 4: Clear Conversion CTA — Ends with real bouquet footage and a clear download prompt. 51 days of continuous advertising indicates strong long-term creative performance.

Ragnarok's 20-Year Legacy Dominates Southeast Asia's RPG Market

Ragnarok: The New World Gravity

120 Days+

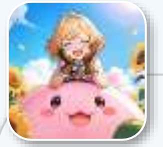
Cumulative Advertising Days

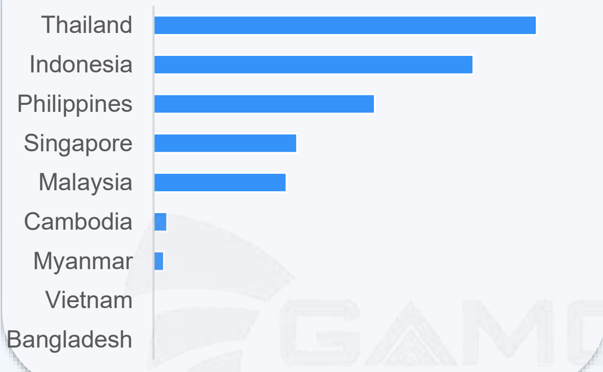
iOS:2026 Y4 M
Android:2025 Y4 M

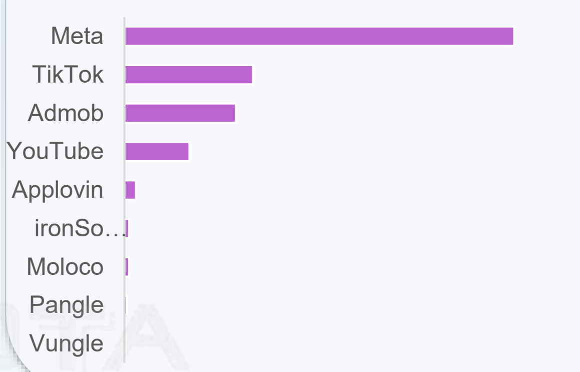
51K

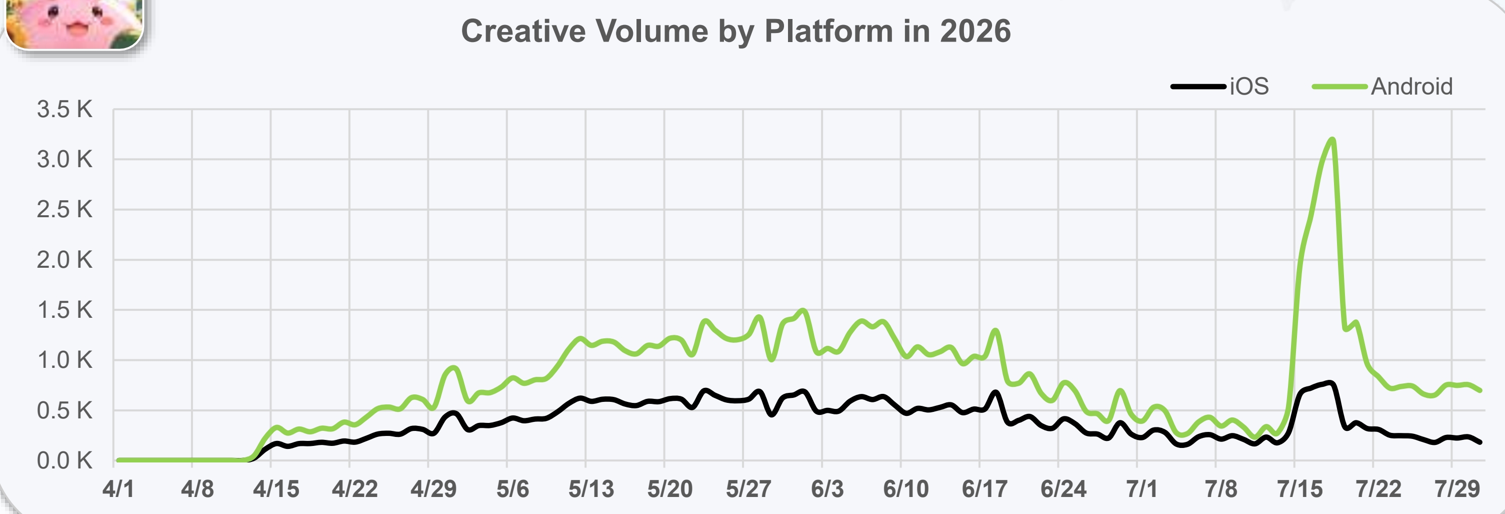
Cumulative Creative Volume

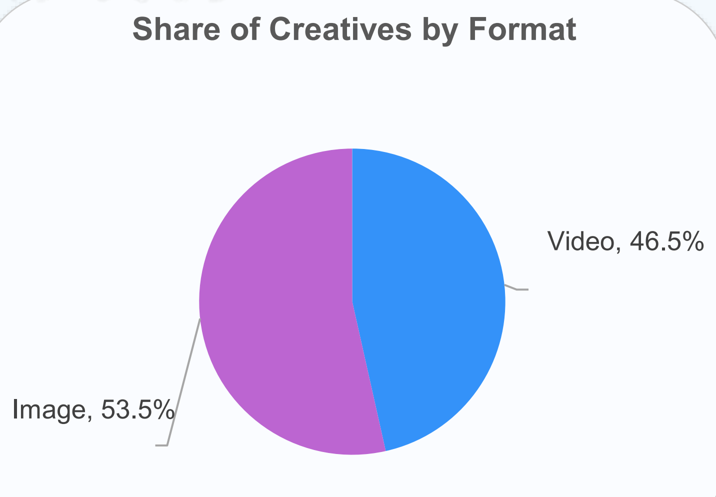
iOS:45.7%
Android:54.3%





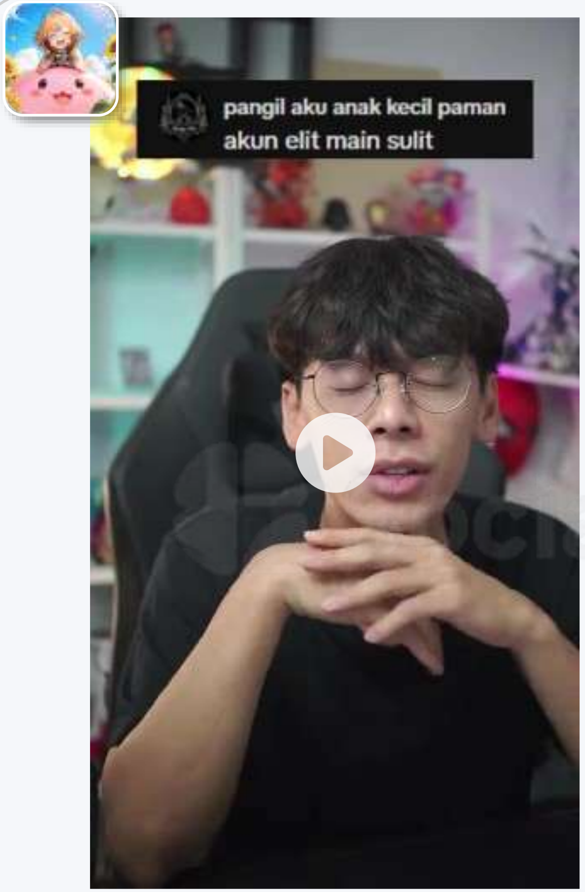






Source: Ad data from SocialPeta-Advertiser Analysis module;
Date Range：2026/4~2026/7

Creative Analysis | Ragnarok: The New World



Video Creative | Vertical 576×1024 | ~47s

Live-Action Spokesperson   Game Montage

Stylized 3D   MMORPG   Classic IP

Click to Play

Advertising Overview (SocialPeta)

760K	173	12K	2 Days
Impressions	Popularity	Creative Score	Duration

Advertising Channel TikTok

Creative Data Vertical 968 × 1379

Language Indonesian

Target Market Indonesia

Game Genre Role-Playing / Open-World RPG / MMORPG

Art Style Stylized 3D / Bright / High-Saturation

Creative Type Live-Action Spokesperson

Theme Tags Classic IP / Nostalgia / Social Co-op

First Seen 2026-05-12

Creative Structure & Key Highlights

High-Emotion Live-Action Hook → Classic-IP Nostalgia → Gameplay Depth Showcase

Highlight 1: High-Emotion Opening — A highly expressive live-action host quickly captures attention and improves early retention.

Highlight 2: Classic IP Nostalgia — Ragnarok's iconic IP revives player nostalgia and social memories, lowering conversion barriers.

Highlight 3: Indonesian Localization — Indonesian voiceover strengthens local relevance, while live action and gameplay footage balance authenticity and gameplay communication.

Highlight 4: Multi-Layer Open-World Gameplay — Social teaming, group battles, and classic combat scenes appeal to both returning fans and new players.

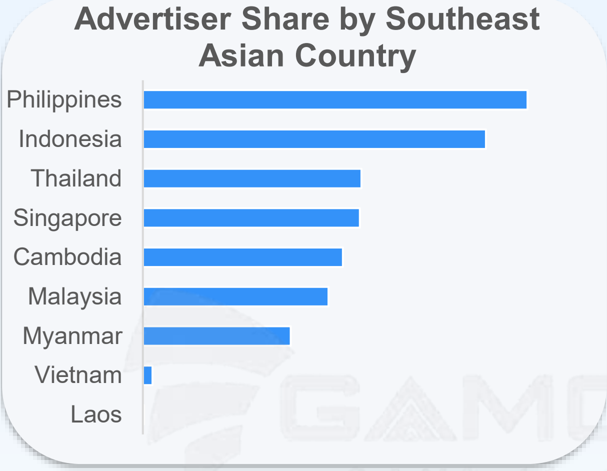
Source: SocialPeta
Date Range: 2026/4~2026/7

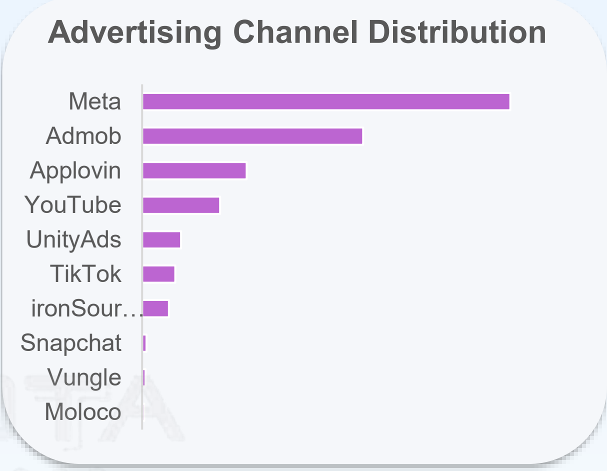
Breaking into the Global SLG Market with Unconventional Themes

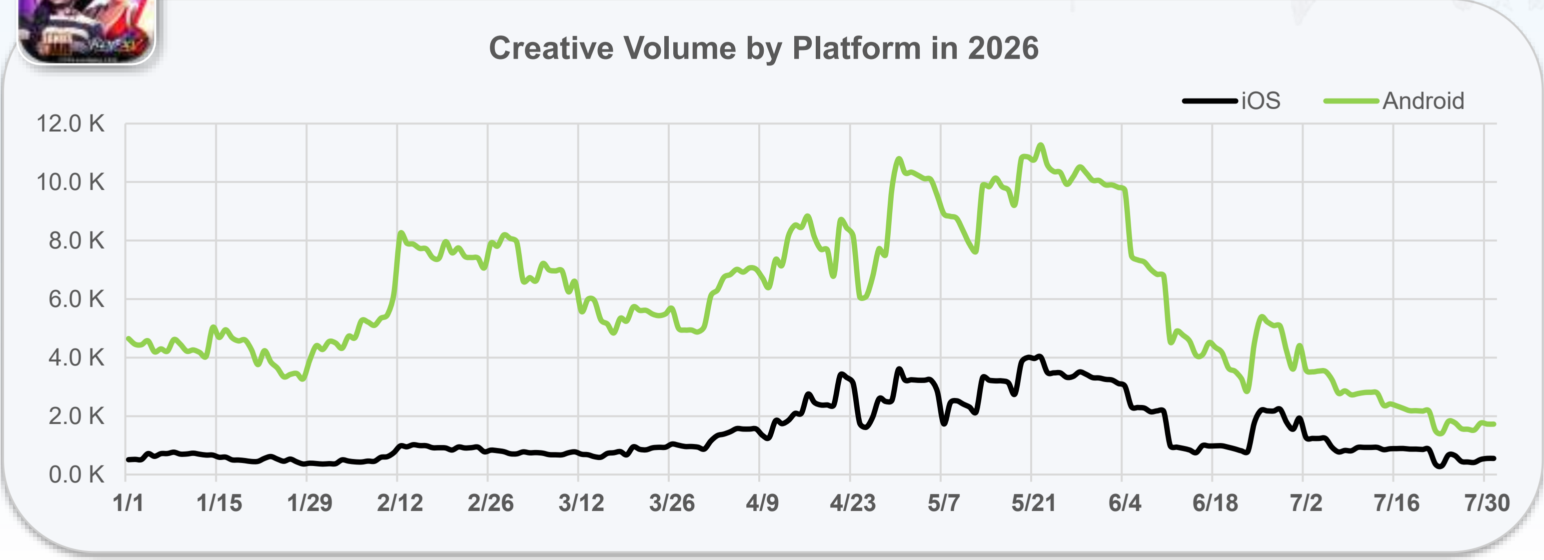
Lands of Jail EWorld

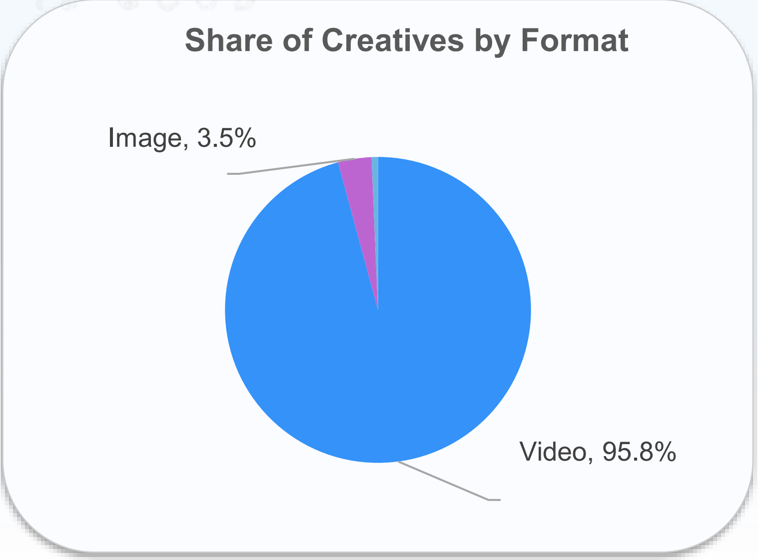
600 Days+
Cumulative Advertising Days
iOS:2025 Y3 M
Android:2024 Y9 M

236K
Cumulative Creative Volume
iOS:29.3%
Android:70.7%



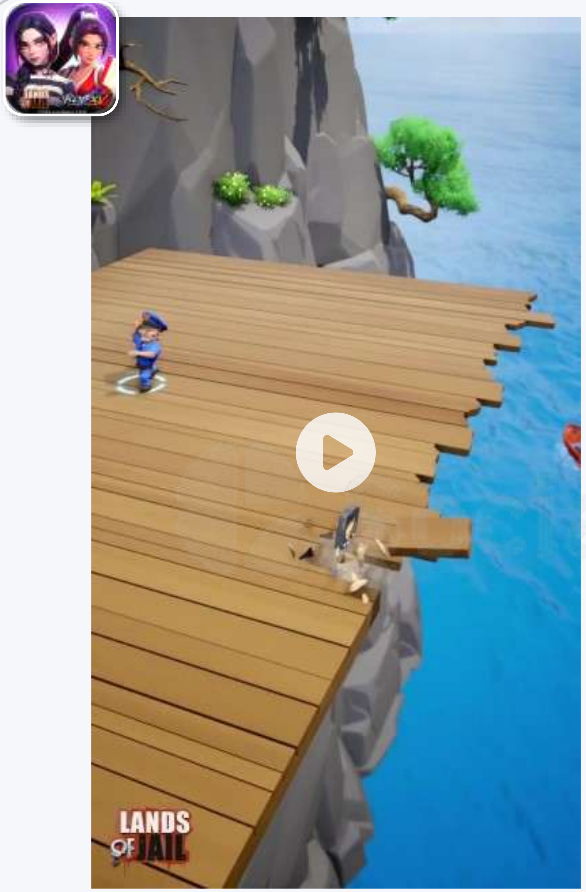






Source: Ad data from SocialPeta-Advertiser Analysis module;
Date Range：2026/1~2026/7

Creative Analysis | Lands of Jail



Video Creative| Vertical 720x1280 | ~59s

Gameplay Footage Building & Management

Stylized 3D Simulation Management Modern Prison

Click to Play Full Creative

Advertising Overview (SocialPeta)

1.59M	864	400K	38 Days
Impressions	Popularity	Creative Score	Duration

Advertising Channel TikTok

Creative Data Vertical 720 x 1280

Language English

Target Market Indonesia

Game Genre Strategy / Simulation / Casual

Art Style Stylized 3D / Bright / High-Saturation

Creative Type Gameplay Recording

Theme Tags Prison Building / Management Simulation / Modern Prison

First Seen 2026-05-17

Creative Structure & Key Highlights

Building Showcase → Management Progression → Revenue Achievement

Highlight 1: Clear Prison-Building Gameplay — Shows the full building process from empty land to a complete prison, quickly communicating the core gameplay loop.

Highlight 2: Bright, High-Saturation Visuals — Stylized 3D and vivid colors differentiate the game from darker prison themes and broaden casual appeal.

Highlight 3: Achievement-Driven Management — Coin rewards, level-ups, and prison expansion reinforce progression and conversion motivation.

Highlight 4: Midcore-Casual Positioning — The strategy, simulation, and casual mix targets a broad audience, while 38 days of sustained advertising indicates strong long-term appeal.

04

Top-Performing Creative Analysis by Popular Game Genre

RPG & Strategy Marketing Cases in Southeast Asia

Southeast Asia RPG Mobile Game Advertising Landscape

RPG advertising in Southeast Asia shows a dual-track landscape: Ragnarok: The New World leads the RPG rankings in Indonesia, Thailand, and the Philippines, while Vietnam is dominated by locally published wuxia/MMO titles, with over 90% of creatives concentrated in the domestic market.

7,914 Advertisers

RPG advertisers active in Southeast Asia, Jan–Jul

No.1 in 4 Rankings

Ragnarok: The New World across Indonesia, Thailand, and the Philippines

90%+Domestic Share

Creative concentration of locally published RPGs in Vietnam

Regional Leader: Ragnarok: The New World ranks No.1 among active RPG advertisers on Android in Indonesia, Thailand, and the Philippines, as well as iOS in Thailand. Each market contributed 5,900–8,400 creatives, accounting for 26%–40% of its global advertising.

Vietnam's Local Ecosystem: Local publishers including VPLAY, WEPLAY, OEG, VTC, and VNG dominate Vietnam's RPG rankings with wuxia, xianxia, and Three Kingdoms MMOs. 82%–95% of their creatives target Vietnam exclusively.

Chinese Publishers Expand Across Markets: Titles from Habby (Dicero, Archero 2), Leniu (Eternal Sword Pact, with 60.8% of creatives focused on Indonesia), and Century Games (Kingshot) rank among leading RPG advertisers across multiple markets.

Top RPG Advertisers by Key Market

Active Creatives in the Past 90 Days and Share of Global Advertising

Market	Title	Publisher	Creative Volume	Global Share
Thailand	**Ragnarok: The New World (Android)**	Gravity	8.3k	36.6%
Thailand	**Ragnarok: The New World (iOS)**	Gravity	7.2k	39.8%
Indonesia	**Ragnarok: The New World**	Gravity	7.1k	31.4%
Philippines	**Ragnarok: The New World**	Gravity	5.9k	26.1%
Vietnam	**Dawnbound Heroes**	Siode	6.6k	23.8%
Vietnam	**Phượng Hoàng Tru Tiên**	VPLAY	5.3k	95.4%
Thailand	**Immortal Destiny: Chosen Heirs**	KEY YO	6.1k	60.9%
Indonesia	**Eternal Sword Pact**	Leniu Games	4.6k	60.8%

Source: SocialPeta
Date Range: 2026/1~2026/7

SocialPeta | GAMOTA

RPG Mobile Game Channel and Creative Insights

Meta remains the core advertising ecosystem for RPGs, while Google channels are more prominent among anime-style and major-publisher titles. Popular creatives are primarily 30–40 second videos with English copy.

82%	39s	93%	82%
Share of video among top creatives	Average Duration of Top Video Creatives	Share of Meta channels	Share of top creatives using English copy

Meta-Led: Titles such as Epic Heroes and Hero Clash allocate around 93% of placements across Facebook, Instagram, Messenger, and Audience Network, prioritizing scalable acquisition.

Google-Led: Brand-driven RPGs such as Genshin Impact (AdMob 33% + YouTube 29%), Honkai: Star Rail (YouTube 36% + AdMob 35%), and MythWars (AdMob 50%) invest heavily in Google's video ecosystem.

High-Conversion Copy: Common hooks include free summon offers, such as Watcher of Realms — "Claim 31 FREE Summons", and interactive skill-choice prompts, such as Survivor!.io — "Which skill should I take?"

Top RPG Creative Characteristics

Based on the weekly Top 100 RPG creatives reaching Southeast Asia

Dimension	Data
Platform Mix	Audience Network 48% + Instagram 39% (Meta ~93%)
Creative Type	Video 82% / Image 18%
Video Duration	Average 39s / Median 33s
Copy Language	English 82%, limited local-language localization
Market Coverage	Sg 76 / MY 75 / PH 64 / TH 63 / ID 62 / VN 31
Frequent Advertisers	*Let's Go Legends!*, *Watcher of Realms*, *Kingshot*, *Archero 2*

Note: Market coverage indicates the share of weekly Top 100 creatives running in each country. Vietnam's significantly lower rate reflects its more localized creative ecosystem.

Source: SocialPeta
Date Range：2026/1~2026/7

Top RPG Creative Analysis in Southeast Asia

Nhất Niệm Tiêu Dao

● AI-Generated | Xianxia World | YouTube

52K Est. Impressions **995** Popularity

Duration: 6 Days · Creative Score: 44K

Performance Boost: AI-generated 2D Chinese ink-style xianxia combat highlights weapon design and skill effects. Vietnamese subtitles improve local relevance while reducing high-quality CG production costs.

Samkok: New Force

● Gameplay Recording | Three-Kingdoms Theme | FB News Feed

850K Est. Impressions **787** Popularity

Duration: 101 Days · Creative Score: 130K

Direct Gameplay Showcase: Lü Bu battles through desert enemies with visible joystick and skill controls, reinforcing authentic gameplay. High-value rewards amplify the sense of power and support 101 days of sustained advertising.

LINE Idle Rangers

● Live-Action Short Drama| Fantasy Adventure | YouTube

36K Est. Impressions **967** Popularity

Duration: 23 Days · Creative Score: 600K

Story-Driven Hook: A humorous conflict around secretly playing games under a mother's supervision leads into rare-character summon footage, with exaggerated reactions enhancing collection appeal and immersion.

Source: SocialPeta
Date Range: 2026/1~2026/7

Southeast Asia Strategy Game Advertising Landscape

Survival SLGs dominate strategy game advertising in Southeast Asia. Omnilojo concentrates nearly half of its spend in Indonesia and the Philippines, while Vietnam is led by locally published Three Kingdoms titles with around 90% domestic creative concentration.

6.8K Advertisers
Active strategy game advertisers in Southeast Asia

57K Creatives
Dark War Survival creatives in the past 90 days

89%+ Domestic Share
Creative concentration of locally published SLGs in Vietnam

Survival SLGs Lead the Market: Omnilojo's Dark War Survival ranks No.1 in Indonesia and the Philippines, while Last Z: Survival Shooter leads in Thailand. In some markets, Southeast Asia accounts for over half of their global advertising.

Kingshot Expands Across Markets: Kingshot ranks No.5 in Indonesia, No.3 in the Philippines, No.3 in Thailand, and No.2 on iOS in Singapore, making it one of Century Games' fastest-growing strategy titles.

Vietnam's Localization Requirements: Locally published Three Kingdoms and strategy titles such as Samkok Tam Quốc, Tân 3Q: MAX, and IK: Infinity Kingdom allocate 89%–97% of creatives exclusively to Vietnam.

Established SLGs Maintain Steady Spend: Rise of Kingdoms (No.2 in Thailand), Doomsday, and Lords Mobile continue sustained advertising across multiple markets.

Top Strategy Advertisers by Key Market

Active Creatives in the Past 90 Days and Share of Global Advertising

Market	Title	Publisher	Creative Volume	Global Share
Indonesia	Dark War Survival	Omnilojo	30.3k	53.3%
Philippines	Dark War Survival	Omnilojo	27.9k	49.2%
Thailand	Last Z: Survival Shooter	Omnilojo	12.6k	39.3%
Indonesia	Last Z: Survival Shooter	Omnilojo	11.2k	34.8%
Thailand	Rise of Kingdoms: Lost Crusade	Lilith	7.3k	43.4%
Vietnam	Samkok Tam Quốc	VPLAY	3.8k	90.8%
Vietnam	IK: Infinity Kingdom	Funtap	3.1k	96.9%
Singapore	Kingshot（iOS)	Century Games	3.7k	37.6%

Source: SocialPeta
Date Range：2026/1~2026/7

SocialPeta | GAMOTA

Strategy Game Channel & Creative Insights

Strategy creatives are 'lightened' — tower-defense/side-gameplay packaging becomes the mainstream SLG UA hook; Meta family carries ~95% of top creatives, with videos averaging 43s and English copy as the backbone.

86%
Share of video among top creatives

43s
Average Duration of Top Video Creatives

95%
Share of Meta channels

87%
Share of top creatives using English copy

Meta Volume-Driven Type: Survival/volume-driven SLGs like Dark War Survival (~87% Meta four channels) and Titan War (~95%) heavily invest in Meta family, pursuing scaled user acquisition

Multi-Channel Type: Whiteout Survival (AdMob 25% + YouTube 12%), Mobile Legends (AdMob 30% + YouTube 20% + TikTok 7%) and Lords Mobile (AdMob 17% + Unity 13%) evenly distribute across Google family and network channels

Side-Gameplay Hook: Punko TD, Galaxy Defense, Coop TD etc. use tower-defense/light gameplay packaging to drive SLG traffic; 'Play for Free' and 'New game released' phrases appear frequently

Top Strategy Game Creative Features

Weekly Top 100 Strategy Game Creatives Reaching Southeast Asia (Week of Jul 27, 2026)

Dimension	Data
Platform Mix	Audience Network 50% + Instagram 36% (Meta ~95%)
Creative Type	Video 86% / Image 13% / Carousel 1%
Video Duration	Average 43s / Median 38s
Copy Language	English 87%, with limited local-language creatives
Market Coverage	Sg 72 / ID 65 / MY 57 / TH 55 / PH 55 / VN 34
Frequent Advertisers	Kingshot、Punko TD、Galaxy Defense、Clash Royale、Dark War Survival

Note: Market coverage indicates the share of weekly Top 100 creatives running in each country. Vietnam’s lower rate reflects its more localized creative ecosystem.

Source: SocialPeta
Date Range：2026/1~2026/7

Top Strategy Game Creative Analysis in Southeast Asia

Click to Play Full Creative

Mobile Legends: Bang Bang

● Esports Montage| MOBA | TikTok

20.62M Est. Impressions **1000** Popularity

Duration: 41 Days · Creative Score: 700K

Esports-Driven Hook: Live tournament footage and player reactions are mixed with gameplay highlights, while kill notifications and live scores recreate the intensity of MOBA competition and engage Indonesian users.

Honor of Kings

● Short-Video Challenge | 5v5 Battle | YouTube

820K Est. Impressions **1000** Popularity

Duration: 8 Days · Creative Score : 110K

Challenge-Style Packaging: A cartoon split-screen challenge highlights 5v5 combat, integrating hero skills into a level-based narrative. Malay-language content strengthens relevance in Malaysia.

Free Fire: Fire Kickoff

● Comedy Story | Tactical Competition | YouTube

160K Est. Impressions **999** Popularity

Duration: 9 Days · Creative Score : 8,788

Humor-Driven Engagement: Character dances, urban parkour, gunfights, item collection, and meme-style humor create an entertaining entry point and lower the barrier to shooter gameplay.

Source: SocialPeta
Date Range: 2026/1~2026/7

Declaration

1. Data Sources

With the assistance of the world's leading 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 1.7 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 –Jul 2026

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

4. Disclaimer

The industry data and market forecasts presented in this report are based on the data captured by SocialPeta Data Team and estimated by using a statistical forecasting model combined with research methods such as desk study and industry interviews. Limited by the research methods and data resources, this report can only be used as reference material. Our company shall have no liability for any data or points of view in this report. SocialPeta shall hold no responsibility for any legal consequences resulting from any action taken by any organization or individual by using or based on the above data information, and the organization or individual shall take full responsibility for any disputes or legal liabilities arising therefrom.

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

North America: USA, Canada, Mexico, Panama

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

JP & ROK: Japan, South Korea

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

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

Oceania: Australia, New Zealand

South Asia: India, Pakistan

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

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

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

THANK YOU

SocialPeta | GAMOTA
GAME IS GOOD