

# 2020 White Paper on Media Buying in the Global Mobile Market



# Global Mobile Market OVERVIEW



# 2020 Global Mobile Market Review GAMES



# 2020 Global Mobile Market Review NON - GAME



# Preface

Eventful 2020:

The First year of restarting  
the “game economy”

With the global outbreak of COVID-19 and the following lockdown nationwide, the “stay at home economy” saw an explosive growth, in which mobile games were one of the industries that gained the greatest benefit, for time spent on mobile devices went up to an all-time high.

## The “Stay at home Economy” Continues, and the Game Industry Met Traffic Dividend Again

In a general atmosphere of global mobile Internet users and mobile device sales growing at a slower pace, it was more difficult for the mobile game market to gain new traffic, so further exploration and operation of existing traffic became a focus. While COVID-19 which broke out in early 2020 and kept spreading worldwide pressed pause in the economic market, the mobile game industry was recovering.

Data shows that the number of global mobile game advertisers increased by 7.8% in 2020 compared with 2019, and at the most significant rate of 32% in Q1. On the whole, under the catalytic effect of the “stay at home economy” worldwide almost throughout 2020, there was a sharp growth in the download and frequent use of mobile games, bucking the trend to bring a second round of traffic dividend to their developers and distributors .

With the mobile game industry entering an era of high-quality operation and competition, tycoons and medium and small game developers all adjusted their strategies for media buying. From all games participating in advertising, it can be seen:

- Puzzle advertisers ranked top for their number and amount of creatives;
- Video creative and short video channels were popular with advertisers in 2020;
- In terms of creative copywriting, most were exaggerated, exciting and digital contents.

# Preface

Eventful 2020:  
The First year of restarting  
the “game economy”

## With the Economic Downturn, Puzzles Became a Hit

Data shows that puzzle advertisers ranked top for their number and amount of creativity among all mobile game advertisers in 2020. Among all genres, money-making online games with incentives such as cash rewards were highly attractive to users with less income during the pandemic and those in third-tier cities and below, gaining an opportunity of bucking the trend to rise in the economic downturn.

Generally speaking, money-making online games feature low costs of development, short cycles, a low threshold of entry, etc. and some are mixed with casual gameplay, such as match 3 games + money-making online games and idle games + money-making online games; in terms of advertising, money-making online game advertisers tend to use copywriting and creative with strong economic stimuli such as emphasis of cash withdrawal, quick transfer and earn money easily at home.

In terms of creativity, various types of games were obviously different. GamePlay creative which can directly show how to play games was more suitable for casual games, especially hyper-casual games; real person creative was more commonly seen in mid-core and hardcore games such as RPG and SLG for extremely strong immersion; strong interactive and puzzle creative performed very well in attracting clicks and more widely used in mid-core and hardcore games.

Here, SocialPeta and Nativex will jointly present a review of global mobile game market data in 2020 and future trends, to provide references for people in the field of the mobile Internet and relevant market participators.

# Methodology

## Data Source

Depending on the largest advertising information analysis tool in the world, the data team of SocialPeta & Nativex will provide you with insights into mobile advertising data in regional game markets around the globe.

## Data Cycle and Indicator Description

The period of sampling for the report: January 1, 2020-December 25, 2020 (unless otherwise stated on any page)

## Statement on Sampling

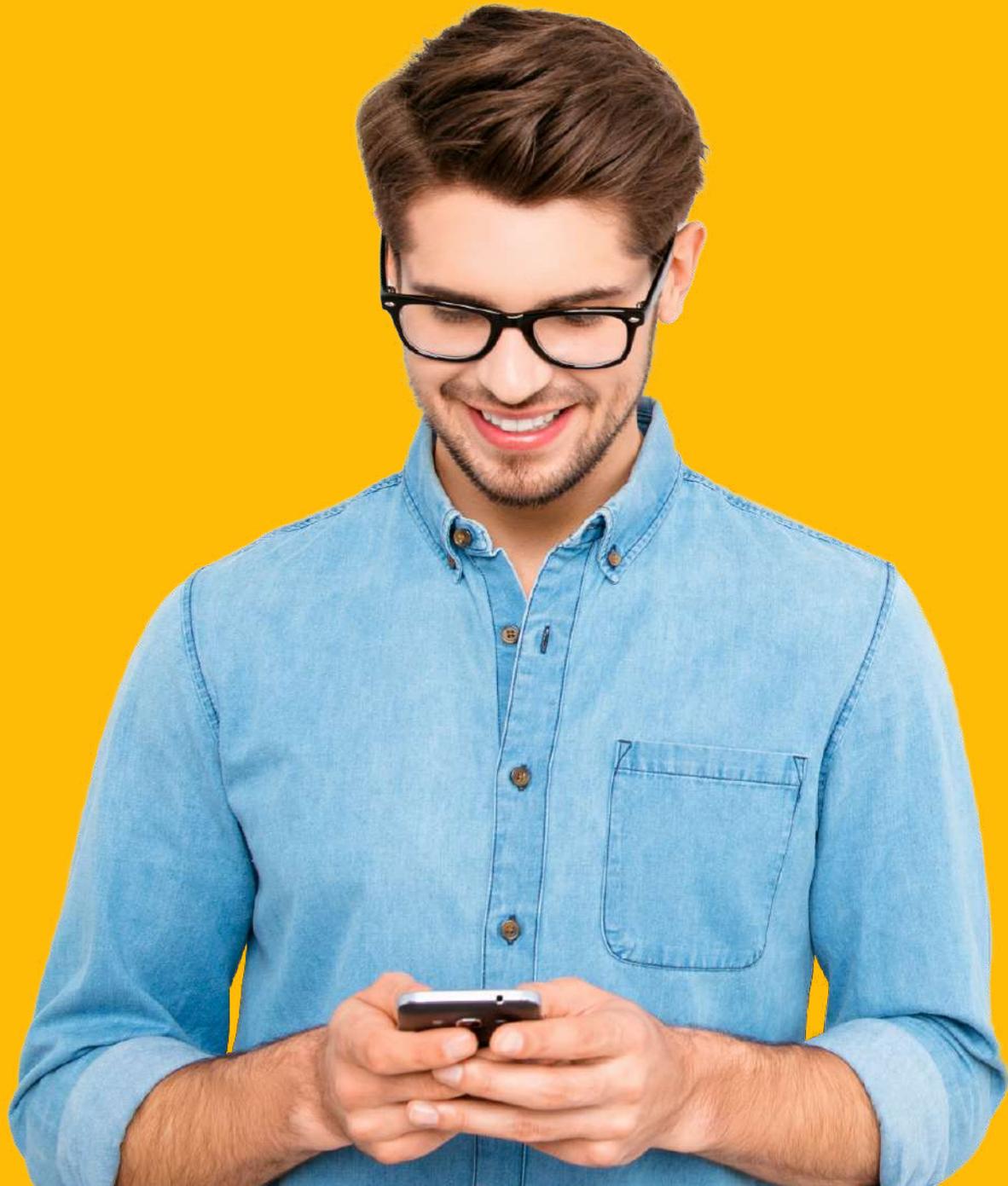
We collect advertising data by sampling on a global scale. We have currently covered **73** channels around the globe, **46** countries and regions, and accumulated over **900 million** pieces of advertising data, updating up to **one million** pieces of advertising data on an hourly basis each day. Based on this huge database, we can gain insights into the overall trend of the advertising industry.

## Terms and Definition

Popularity: obtained by estimating the time of placing creative, the number of associated ads and the effect of advertising.

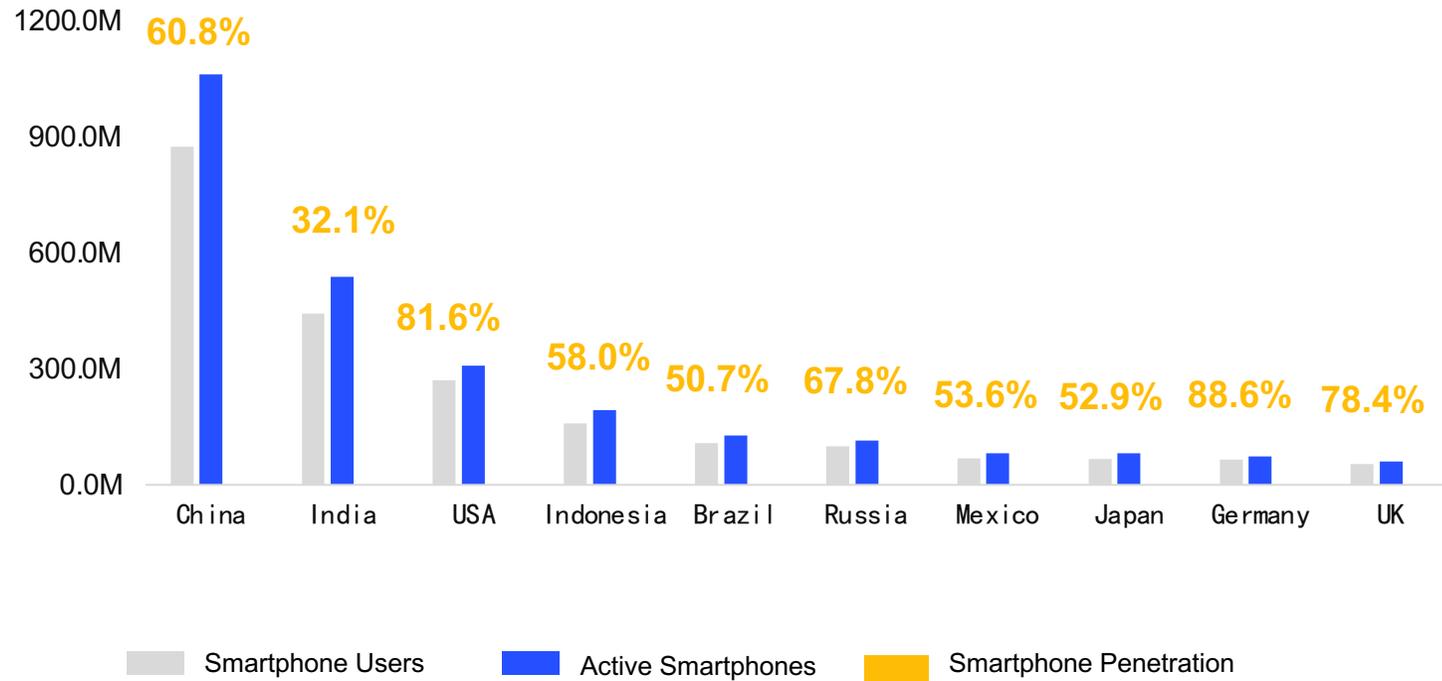
Latest: creative or advertisers to gain a higher value of popularity within a scheduled period.

Hot: creative or advertisers performing very well in advertising for over 30 days.



# **Global Mobile Market Overview**

# 2020 Global Mobile Market TOP10 (By Scale of Smartphone Users)



Now, China boasts the largest number of active smartphone users. According to Newzoo's report in October 2020, the number of smartphone users in China would reach 874 million by the end of the year. Until 2023, China will remain a market with the largest scale of smartphone users in the world. In 2020, the number of smartphone users in India would reach 443 million, ranking second in the world and followed by the USA with the number of 270 million.

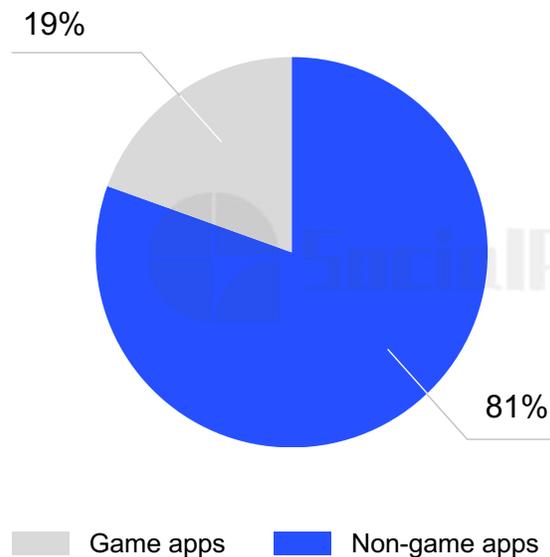
Data Source: Newzoo 2020 Global Mobile Market Report

# Overview of Media Buying in the Global Mobile Market

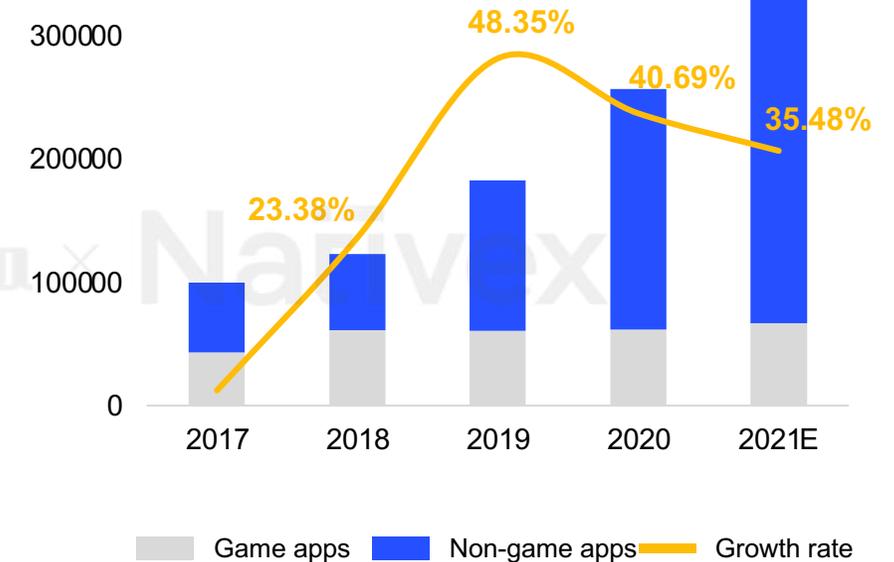
In 2020, media buying in the global mobile market still maintained a strong growth trend. SocialPeta fetched over 250,000 mobile advertisers throughout the year. By amount of creative, the ratio of mobile game to non-game apps was 2:8.

It is predicted that over 350,000 mobile apps will join the competition for media buying and advertising in 2021.

Proportion of mobile app creative in 2020



The scale of global mobile advertisers from 2017 to 2021





# 2020 Global Mobile Market Review

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**GAMES**

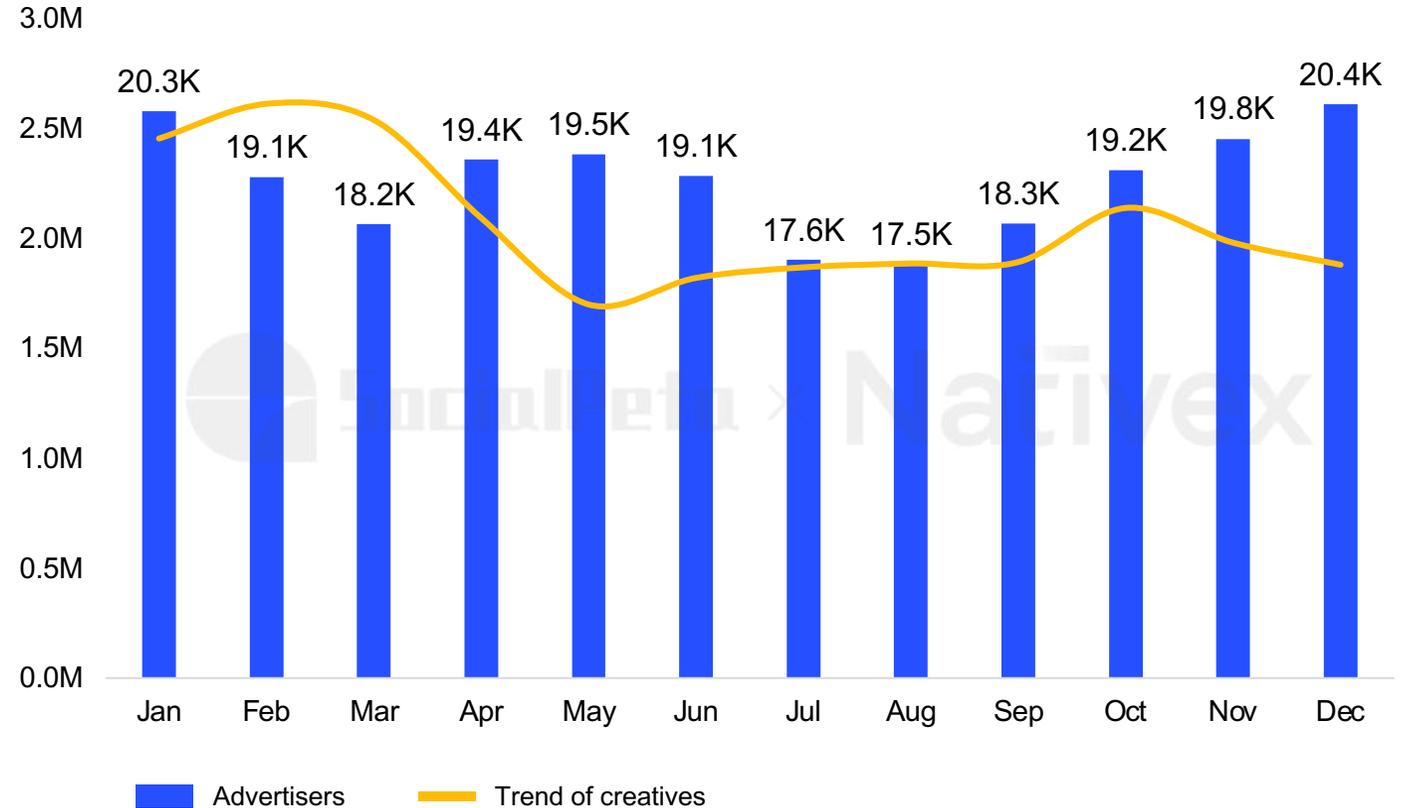
# 01 2020 Global Media Buying Review and Opinions

# 2020 Trend of Global Mobile Game Advertisers

From January 2020 to December 2020, SocialPeta fetched nearly 60,000 global mobile game advertisers cumulatively and accumulated over 12 million pieces of creatives, to observe the trend of media buying in 2020.

Advertisers reached a peak in January 2020, when the number of game advertisers exceeded 20,000 cumulatively. Then, they were in decline until significant growth appeared in Q4.

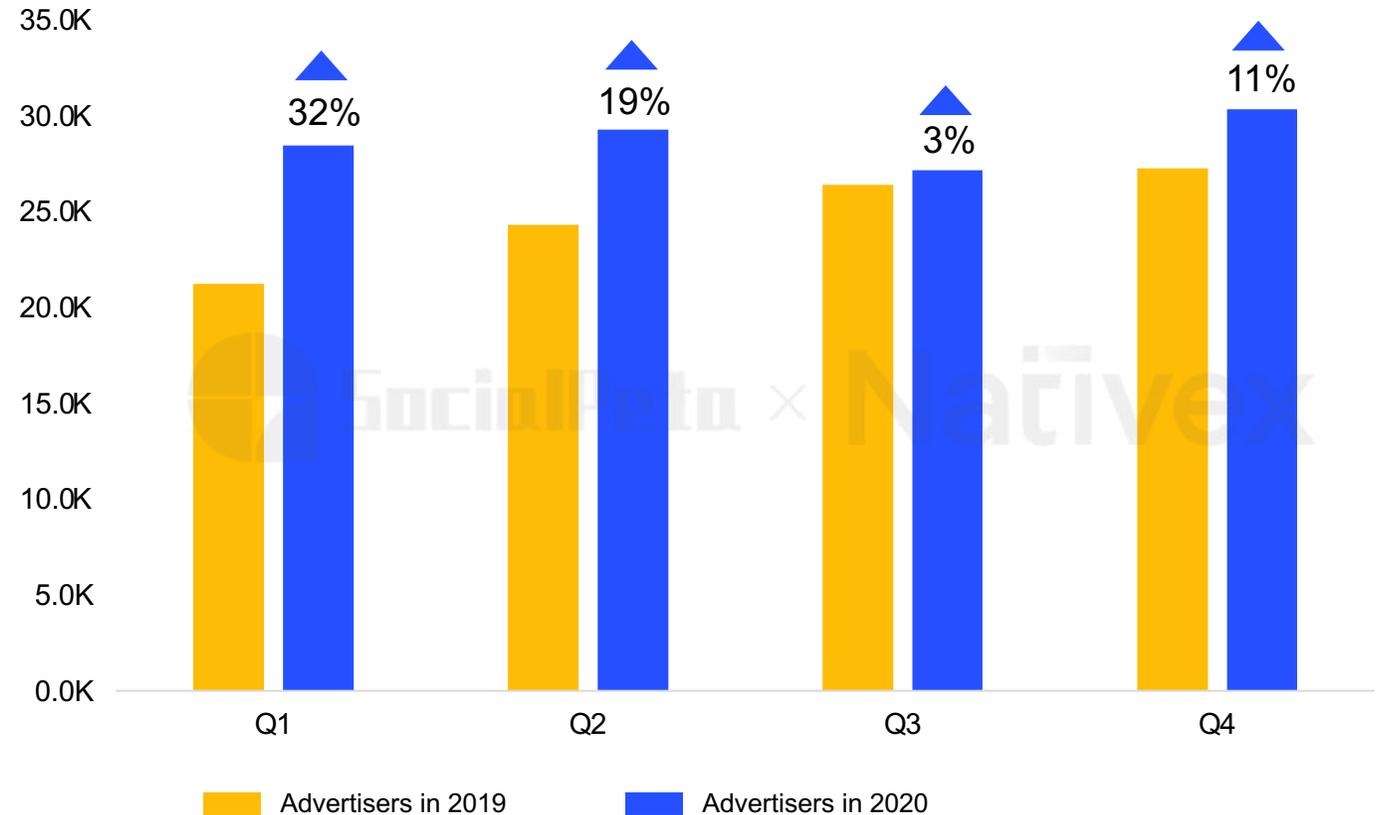
By amount of creative, Q1 and Q4 were major periods of advertising for advertisers.



# Changing Trend of Mobile Game Advertisers from 2019 to 2020

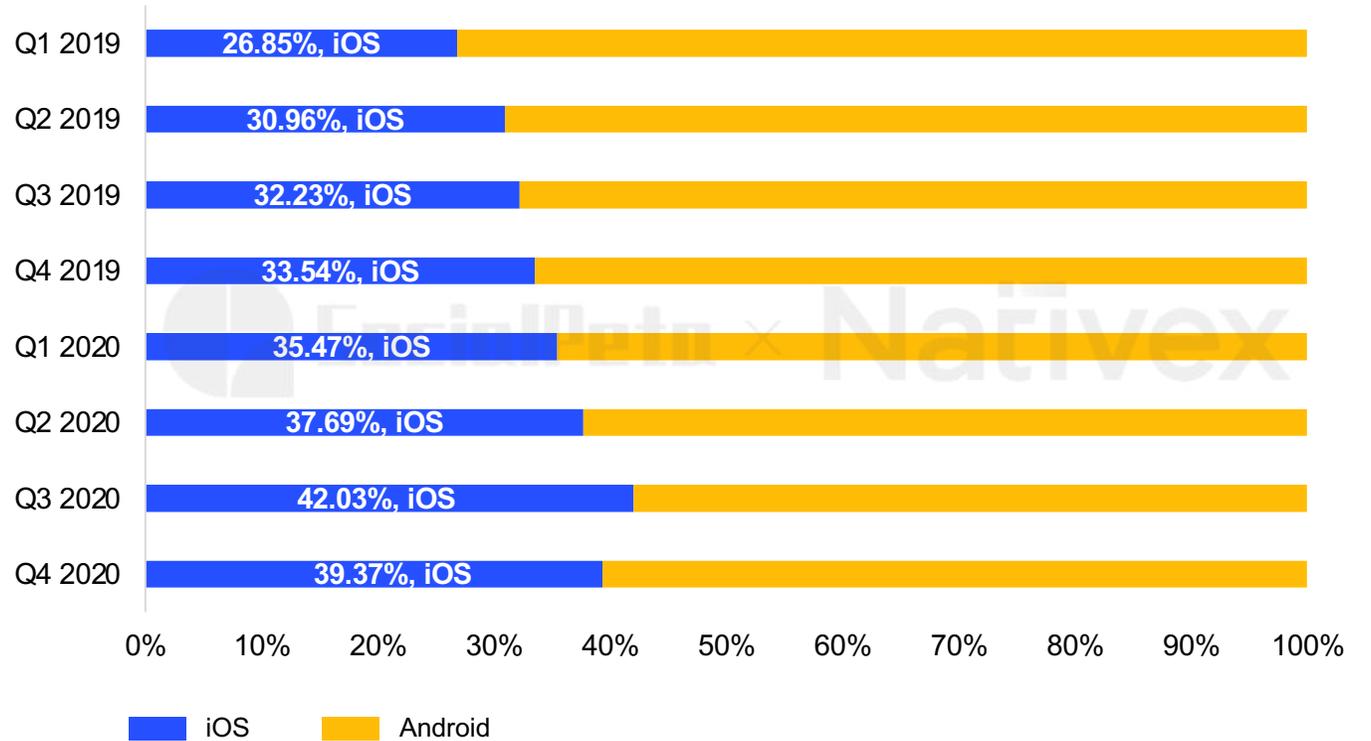
With the global outbreak of COVID-19 in 2020, mankind experienced the toughest time in recent years, but spending more time at home brought an unprecedented opportunity to the development of mobile games. On the whole, the number of advertisers grew by 7.8% compared with that in 2019.

It increased most obviously in Q1, by 32%.



# Proportion Trend of Android & iOS Advertisers

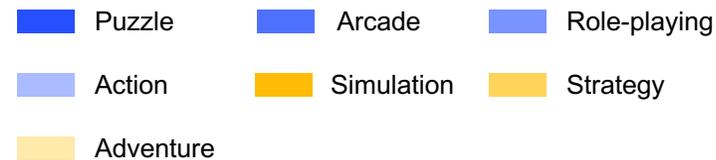
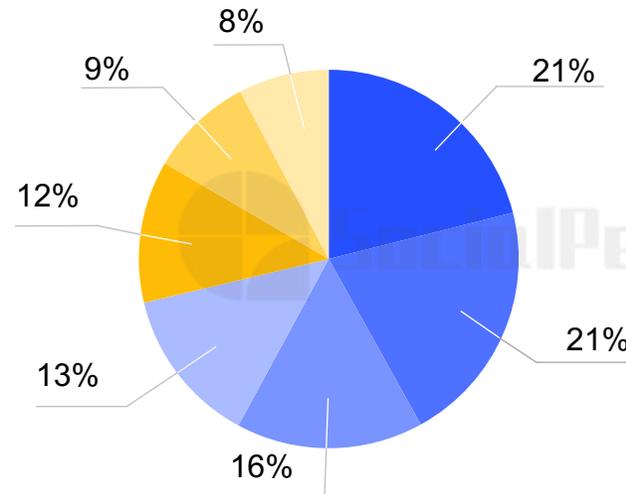
The proportion of Android advertisers was over 50%, but that of iOS advertisers rose gradually. In Q4 of 2020, the ratio of Android to iOS was about 6:4.



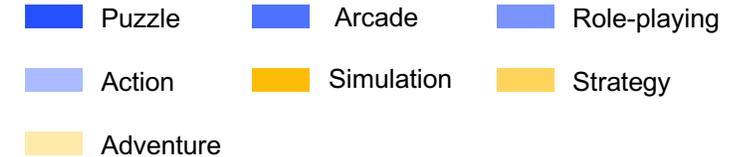
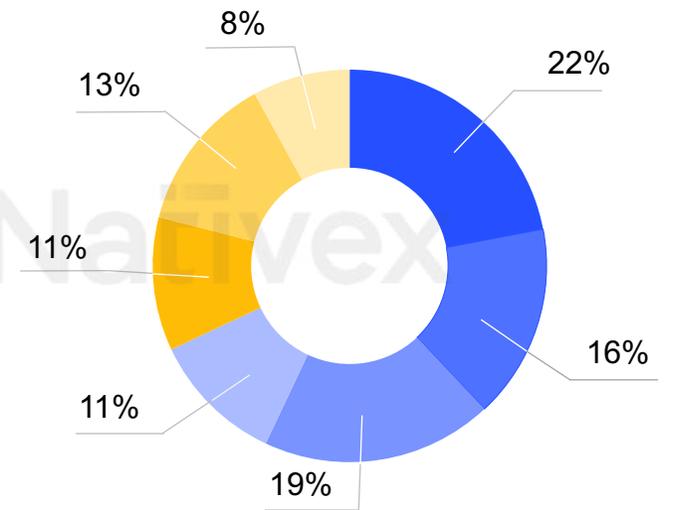
# Various Types of Mobile Game Creative

Among all mobile game advertisers, the quantity of puzzle advertisers and creative placed were both the largest. In 2020, we fetched nearly 11,000 puzzle advertisers cumulatively, and accumulated over 2.8 million pieces of creatives.

Proportion of various types of mobile game advertisers



Proportion of various types of mobile game creative

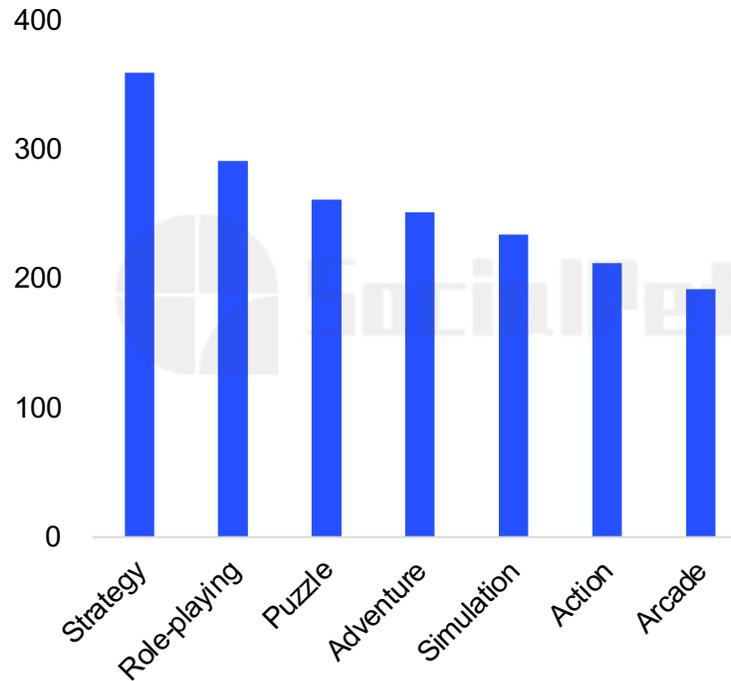


# Various Types of Mobile Game Creative

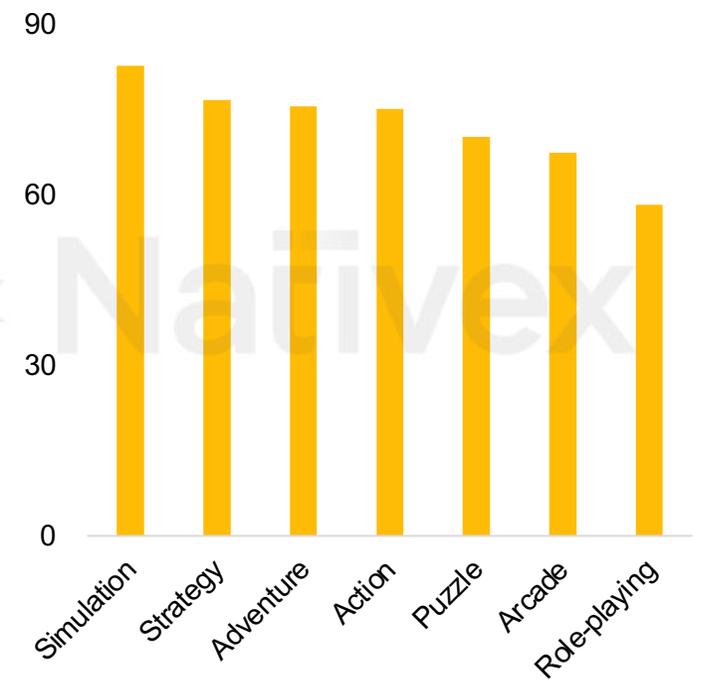
In terms of media buying, strategy games were the largest media buyers in 2020, with each advertiser placing 359 pieces of creative annually on average.

From appreciation value of all creative, creative of simulation games was the most popular with users, with each piece on average gaining the highest popularity.

Average amount of creative=Amount of various types of creative/Quantity of various types of advertisers



Average popularity of creative=Total popularity of various types of creative/amount of various types of creative

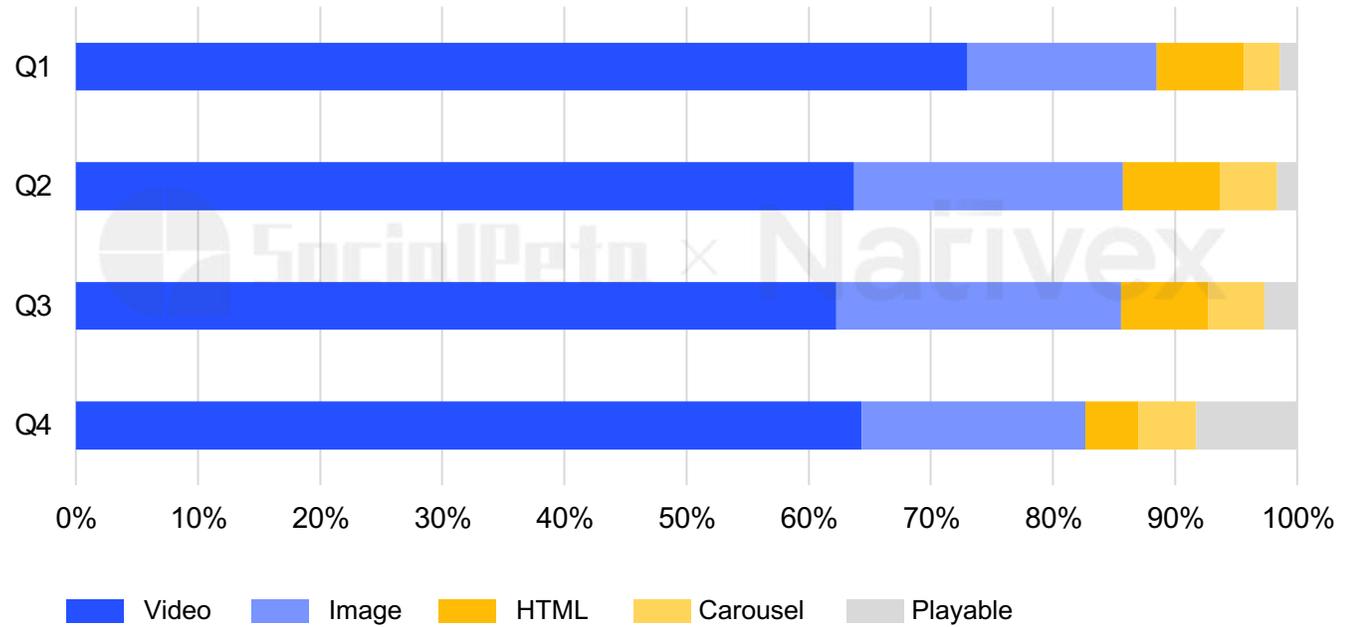


# Types of Creative Placed

Video creative was still the first choice for advertisers, accounting for over 60% of the total.

However, the proportion of video creative gradually declined from Q1 to Q4 in 2020. Playable ads grew rapidly in Q4, rising from less than 2% at the beginning of the year to nearly 8% now.

Proportion trend of various types of creative



# 02 Global Hot Channels

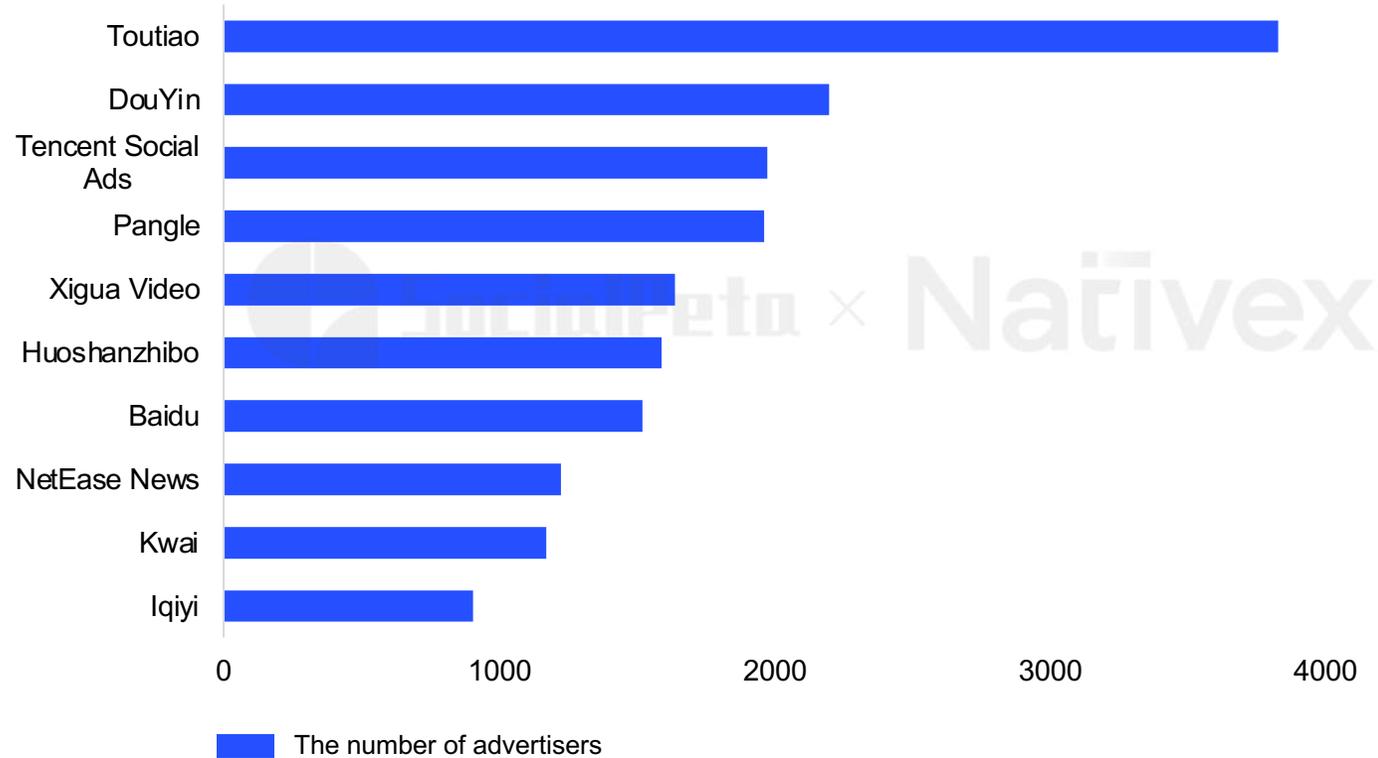
# Hot Channels in China

As one of the most popular channel providers with game manufacturers in China, ByteDance had its 5 major channels, namely Toutiao, Douyin, Pangle, Xigua Video and Huoshanzhibo on the list.

Toutiao had the largest number of advertisers, and cumulatively fetched nearly 4,000 game advertisers in 2020.

TOP10 hot channels in China

Sorted by the number of advertisers



## TOP30 Media Buyers in China (Sorted by the Amount of Creative Excluding Repeated Pieces)

| Ranking | Advertiser                   | System  | Game Type         | Ranking | Advertiser              | System  | App Type     |
|---------|------------------------------|---------|-------------------|---------|-------------------------|---------|--------------|
| 1       | Sanguozhi · Strategy Version | iOS     | Strategy          | 16      | Quanmin Yangzhuchang    | iOS     | Simulation   |
| 2       | AFK Arena (CN)               | iOS     | Card              | 17      | Diliutian Mowang        | iOS     | Role-playing |
| 3       | Aishang Xiaoxiaoxiao         | Android | Casual            | 18      | 新射雕群侠传之铁血丹心             | iOS     | Role-playing |
| 4       | hree Kingdoms Fantasy Land   | iOS     | Card              | 19      | Fugu Chuanqi            | iOS     | Role-playing |
| 5       | Fengkuang Caichengyu         | Android | Casual and Puzzle | 20      | 梦幻西游网页版                 | Android | Role-playing |
| 6       | Chengyu Dashi                | Android | Casual and Puzzle | 21      | Immortal Conquest       | iOS     | Strategy     |
| 7       | Buyu Dazuoazan (Tuyoogame)   | iOS     | Casual            | 22      | 2048 Qiuqiu Pengpengle  | Android | Casual       |
| 8       | Rise of Kingdoms (CN)        | iOS     | Strategy          | 23      | he Marvelous Snail (CN) | iOS     | Adventure    |
| 9       | Junior Three Kingdom 2 (CN)  | iOS     | Card              | 24      | 梦幻西游网页版                 | iOS     | Role-playing |
| 10      | Junior Three Kingdom: Zero   | iOS     | Card              | 25      | My Kungfu Is Special    | iOS     | Action       |
| 11      | Banzhuren Moniqi             | iOS     | Simulation        | 26      | Moonlight Blade Mobile  | iOS     | Role-playing |
| 12      | Aishang Xiaoxiaoxiao         | iOS     | Casual            | 27      | Rotate Blade Master     | Android | Action       |
| 13      | Fengkuang Caichengyu         | iOS     | Casual and Puzzle | 28      | Wolai Tiaoyitiao        | Android | Casual       |
| 14      | Quanmin Yangkonglong         | iOS     | Simulation        | 29      | Brawl Stars (CN)        | iOS     | Action       |
| 15      | Internet Cafe Simulator      | iOS     | Simulation        | 30      | Wode Dadao Sishimi      | iOS     | Casual       |

# Hot Channels in China—Toutiao

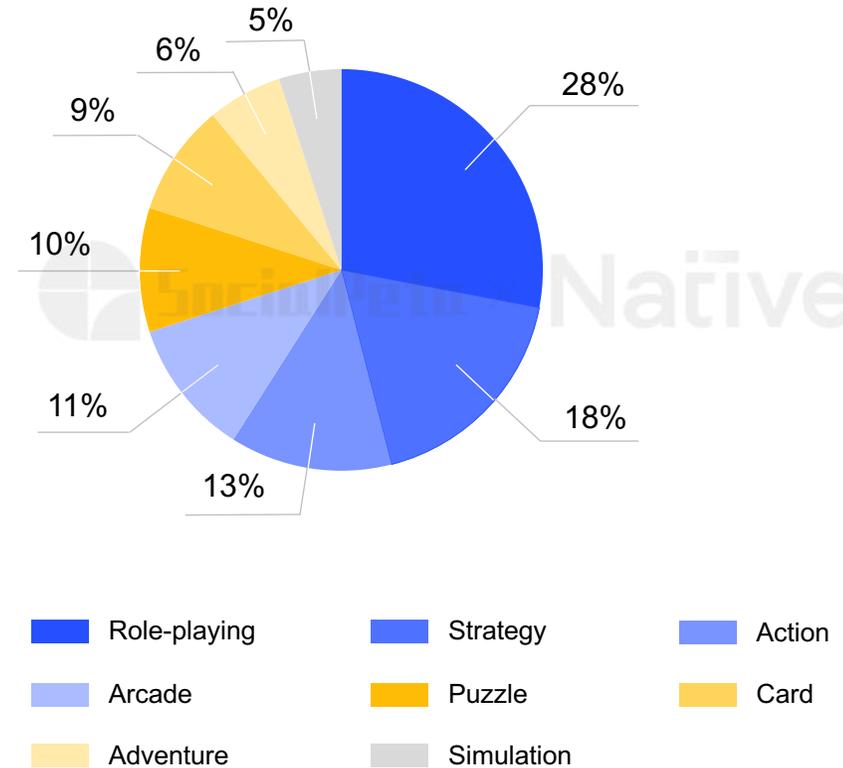
Role-playing creative accounted for 28%, to be the type of creative with the highest proportion through this channel, followed by strategy and action creative. It can be observed that advertisers of Toutiao were mostly midcore and hardcore games.

## TOP3 Hot Advertisers

## Developer

## Game Types

|   |                |              |            |
|---|----------------|--------------|------------|
|    | AFK Arena (CN) | Lilith Games | Card, Idle |
|   | 我功夫特牛          | PeakX Games  | Action     |
|  | 三国志·战略版        | EJOY         | Strategy   |



# Hot Channels in China — Tencent Social Ads

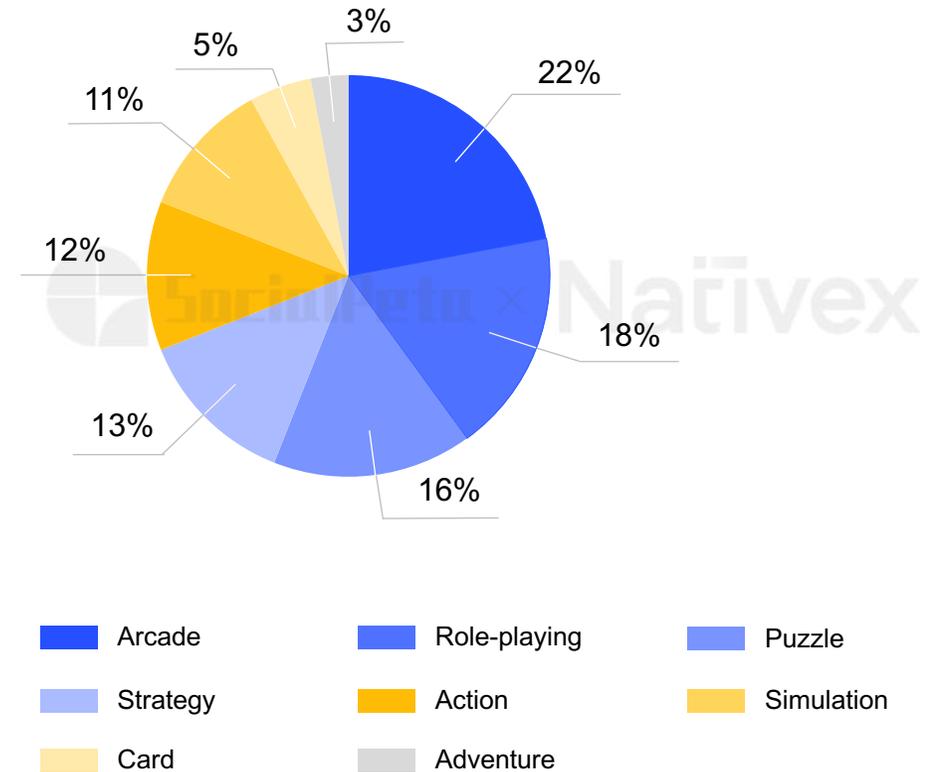
The proportion of arcade, role-playing and puzzle creative was 22%, 18% and 16% respectively, ranking top 3. As a self-owned advertising platform of Tencent, it has many Tencent games, and gameplay placed by the platform is more casual.

## TOP3 Hot Advertisers

## Developers

## Game Types

|   |                  |         |                  |
|---|------------------|---------|------------------|
|    | PUBG Mobile (CN) | Tencent | Shooting         |
|   | 班主任模拟器           | PAPABOX | Simulation, Idle |
|  | 全民养恐龙            | 上海酷祯网络  | Simulation       |

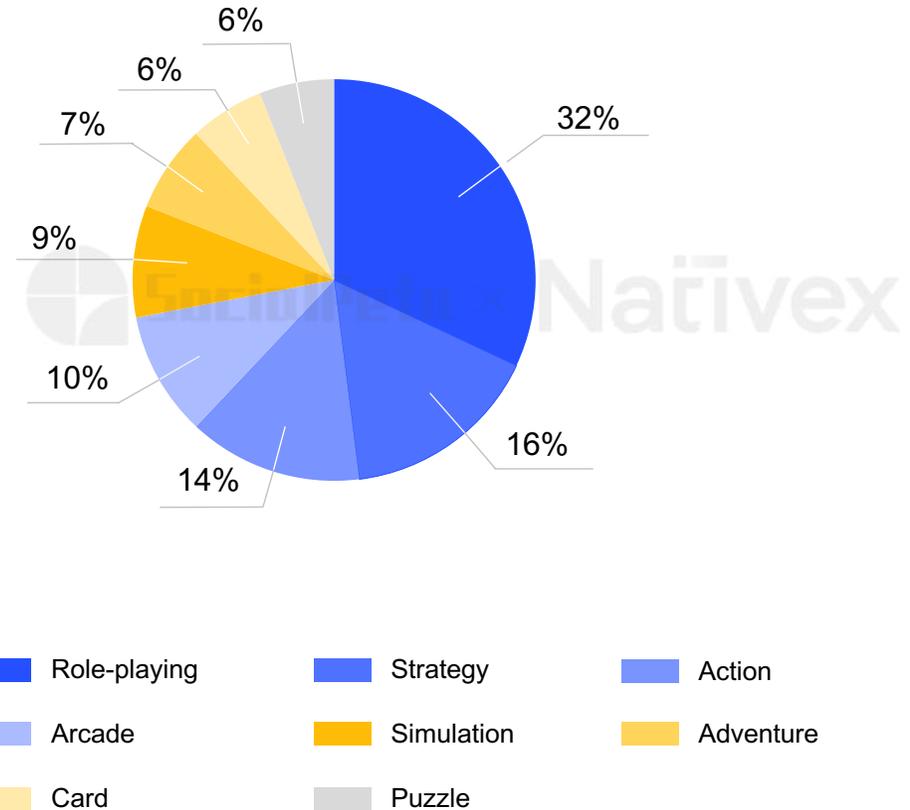


# Hot Channels in China—DouYin

As a representative of short video channels in China, Douyin is popular with domestic game manufacturers due to its large user base, young users etc. TOP3 media buyers of Douyin were 3 products of NetEase in 2020.

In terms of creative types, role-playing ranked top with a proportion of 32%, followed by midcore and hardcore types of gameplay such as strategy and action games.

| TOP3 Hot Advertisers  | Developers           | Game Types   |
|---|----------------------|--------------|
|  Immortal Conquest         | NetEase Mobile Games | Strategy     |
|  Fantasy Westward Journey | NetEase Mobile Games | Role-playing |
|  Journey to the West     | NetEase Mobile Games | Role-playing |

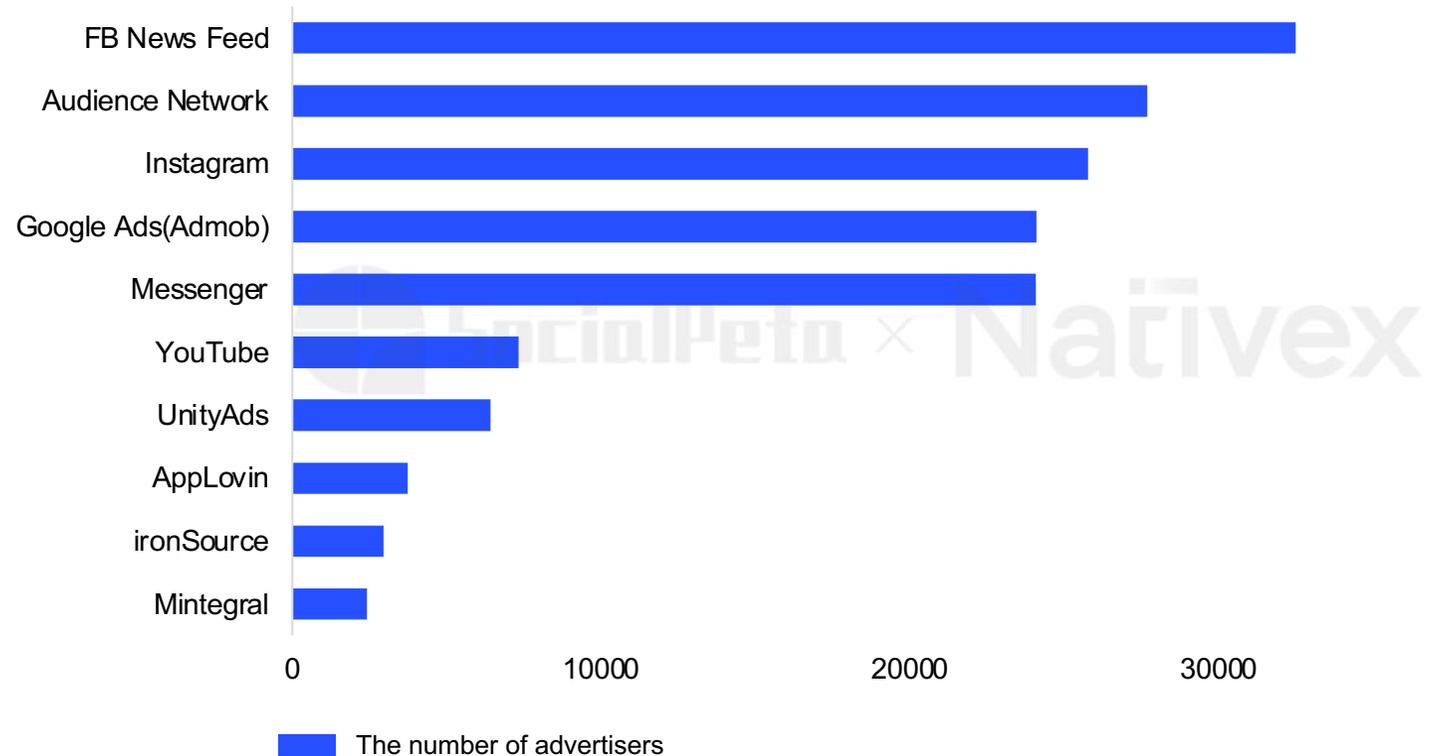


# Global Hot Channels

FB series (FB News Feed, Audience Network, Instagram, Messenger) and Google series (Google Ads, YouTube) were still the most popular overseas channels, and over 85% of global advertisers would choose them as major advertising channels for the globalization of their games.

TOP10 global hot channels

Sorted by the number of advertisers



## TOP30 Global Media Buyers (Sorted by the Amount of Creative Excluding Repeated Pieces)

| Ranking | Advertiser                     | System  | Game Type           | Ranking | Advertiser                    | System  | Game Type          |
|---------|--------------------------------|---------|---------------------|---------|-------------------------------|---------|--------------------|
| 1       | Idle Miner Tycoon              | Android | Casual              | 16      | Age of Z Origins              | iOS     | Strategy           |
| 2       | Merge Gardens                  | Android | Casual              | 17      | Game of Sultans               | Android | Strategy           |
| 3       | Idle City Empire               | Android | Casual              | 18      | Colorscapes                   | Android | Casual             |
| 4       | Gardenscapes                   | Android | Casual              | 19      | Paint.ly                      | iOS     | Casual             |
| 5       | Mafia City                     | Android | Strategy            | 20      | AFK Arena                     | iOS     | Card               |
| 6       | Coloring Book                  | Android | Casual              | 21      | Rise of Kingdoms              | iOS     | Strategy           |
| 7       | Wood Block Puzzle              | Android | Casual              | 22      | State of Survival             | iOS     | Strategy           |
| 8       | Impulse                        | iOS     | Casual              | 23      | Word Swipe Pic                | Android | Puzzle             |
| 9       | Garena Free Fire: BOOYAH Day   | Android | Action and shooting | 24      | AFK Arena                     | Android | Card               |
| 10      | Mafia City: War of Underworld  | iOS     | Strategy            | 25      | Immortal Taoists              | Android | Adventure and text |
| 11      | Happy Colour by Numbers        | iOS     | Casual              | 26      | Toon Blast                    | iOS     | Casual             |
| 12      | Pintar por número              | iOS     | Casual              | 27      | Dragon City                   | Android | Simulation         |
| 13      | Park of Monster                | Android | Casual              | 28      | Galaxy Attack: Alien Shooter  | iOS     | Arcade             |
| 14      | Final Fantasy XV: A New Empire | Android | Role-playing        | 29      | Tap Color                     | Android | Casual             |
| 15      | Lucky Day                      | Android | Casino              | 30      | Chapters: Interactive Stories | iOS     | Puzzle             |

# Global Hot Channels—FB News Feed

As No. 1 channel around the globe, it has been 16 years since it was launched online in 2004. Its familiar algorithms and global audience enable it to be the first choice of many exported products.

In terms of creative types, role-playing accounted for the highest proportion of 22%.

## TOP3 Hot Advertisers

## Developers

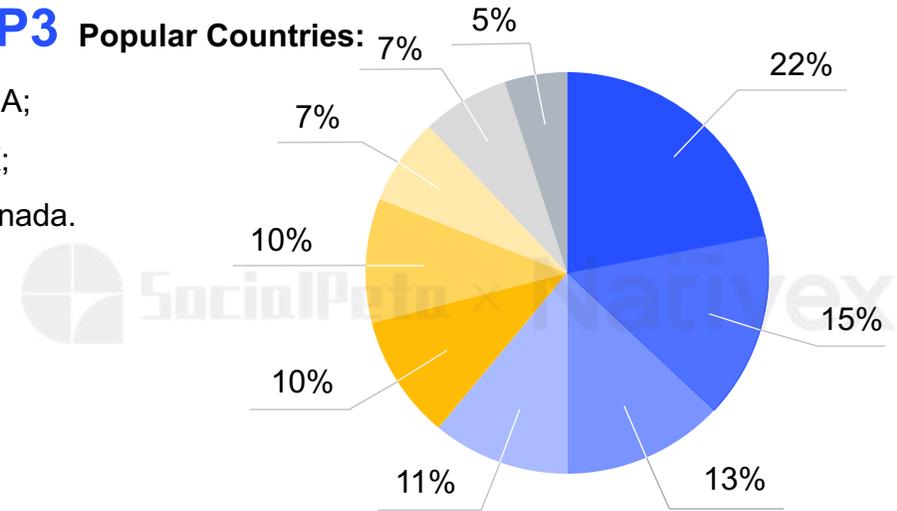
## Game Types

|   |                 |                       |          |
|---|-----------------|-----------------------|----------|
|    | Mafia City      | YottaGame             | Strategy |
|   | Coloring Book   | Doodle Mobile Limited | Casual   |
|  | Park of Monster | LT Fun Inc.           | Casual   |

## TOP3

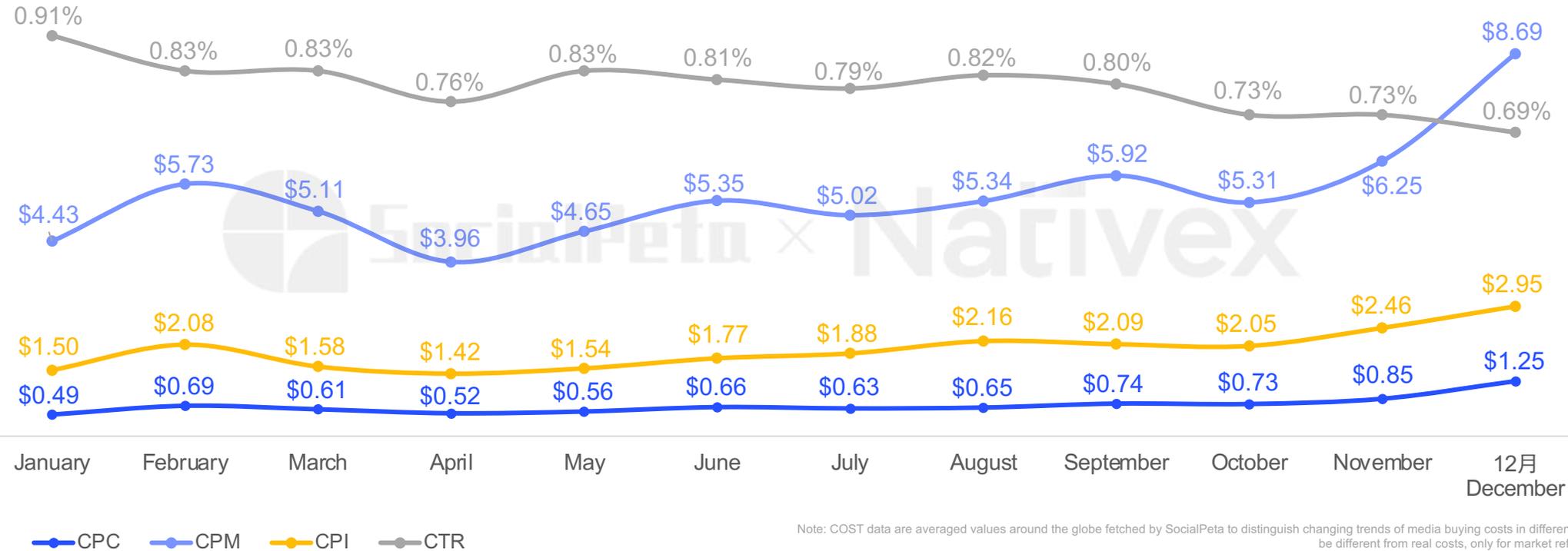
### Popular Countries:

1. USA;
2. UK;
3. Canada.



# Global Hot Channels—FB News Feed COST

Global average COST trend of Facebook channels in 2020



CPM, CPC and CPI showed a constant growth trend in 2020, reaching peaks all in December, which were \$8.69, \$1.25 and \$2.95.

On the whole, CTR fell into decline, reaching a peak by 0.91% in January.

# Global Hot Channels—Google Ads (Admob)

Established in 2006, Admob was acquired by Google in 2009. By virtue of Google’s great technical strength and perfect access to Google Play, this channel is highly popular with major game advertisers.

Puzzle creative ranked top with a proportion of 22%, followed by arcade and role-playing games. Creative mostly appeared in developed countries in Europe and America such as the USA, Canada and Australia.

## TOP3 Hot Advertisers

## Developers

## Game Types



Gardenscapes

Playrix

Casual



Happy Colour by Numbers

X-Flow

Casual



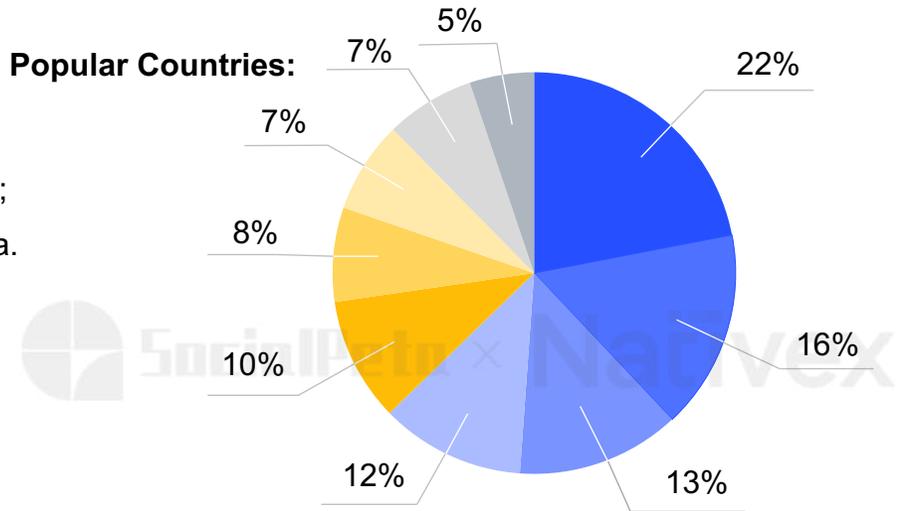
Pintar por número

DAILYINNOVATION CO.,LIMITED

Casual

## TOP3 Popular Countries:

1. USA;
2. Canada;
3. Australia.



# Global Hot Channels—Mintegral

Mintegral is an AI-driven programmatic interactive advertising platform, dedicated to bridging the gap between East and West in the field of mobile marketing and providing global mobile developers with solutions on user acquisition, traffic monetization and creative, to help developers achieve growth.

## TOP3 Hot Advertisers

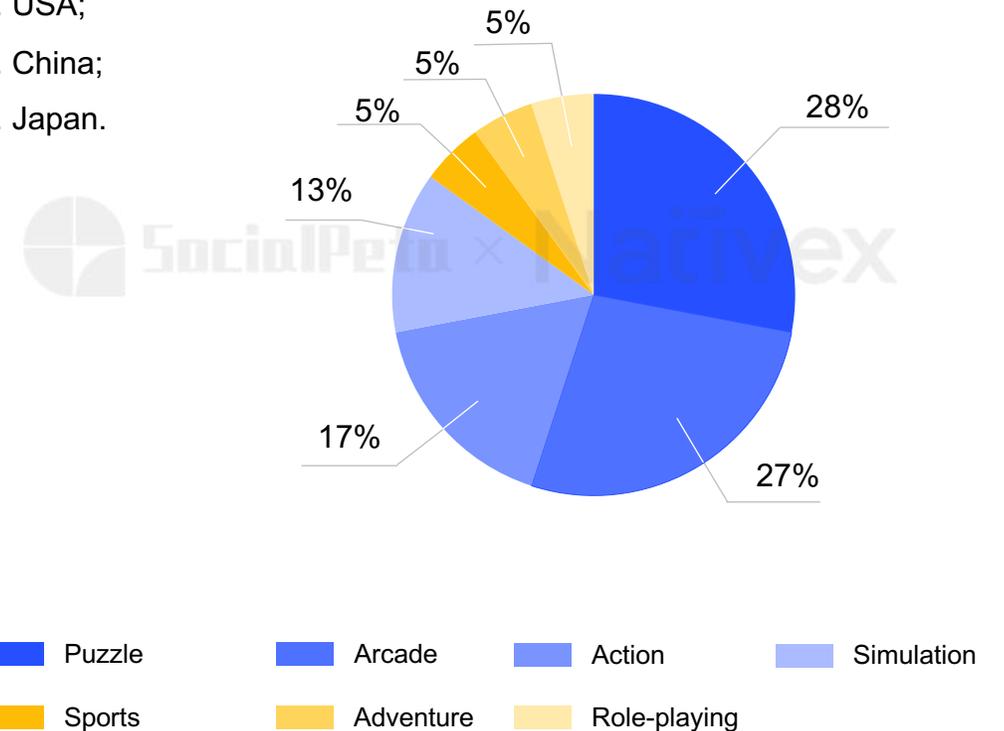
## Developers

## Game Types

|   |                  |             |                      |
|---|------------------|-------------|----------------------|
|    | Shortcut Run     | Voodoo      | Hyper Casual         |
|   | My Talking Tom 2 | Outfit7     | Casual, Simulation   |
|  | Braindom 2       | MATCHINGHAM | Hyper Casual, Puzzle |

## TOP3 Popular Countries:

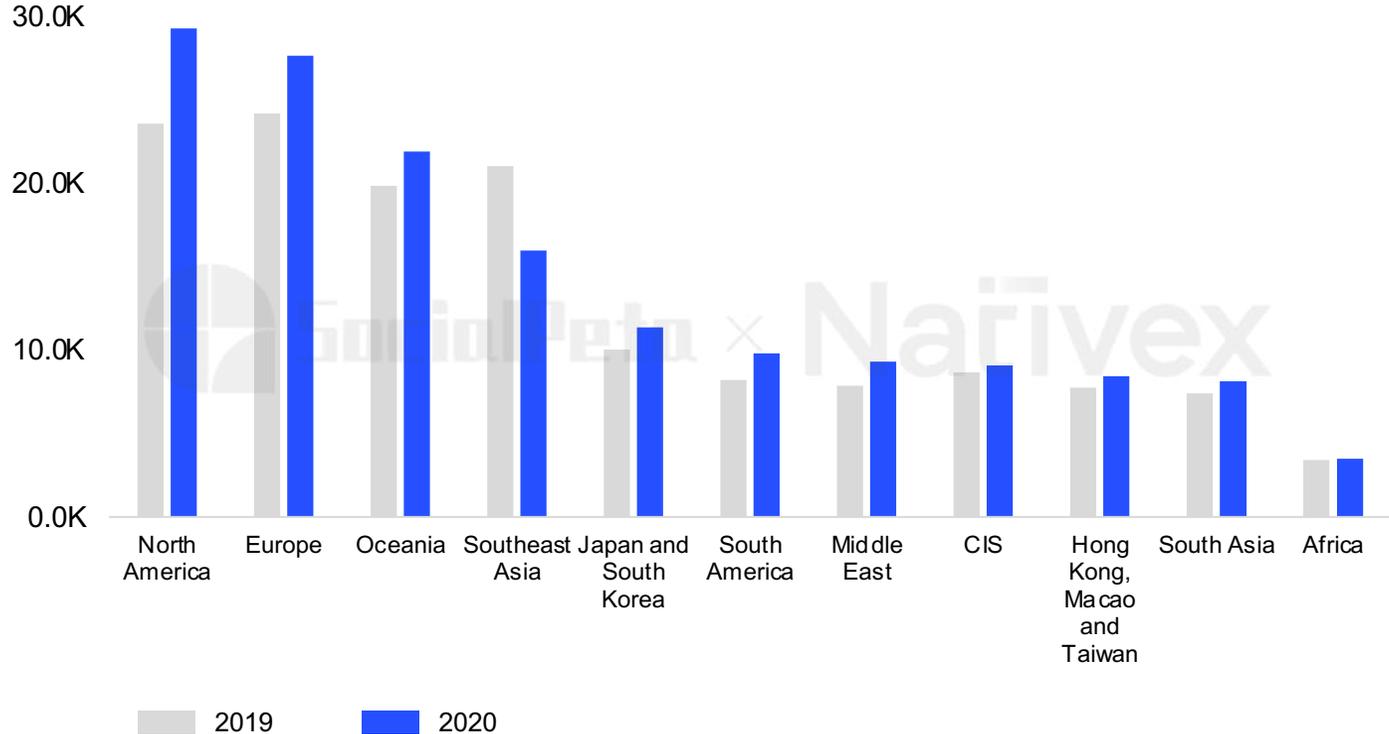
1. USA;
2. China;
3. Japan.



# 03 Global Popular Countries/Regions

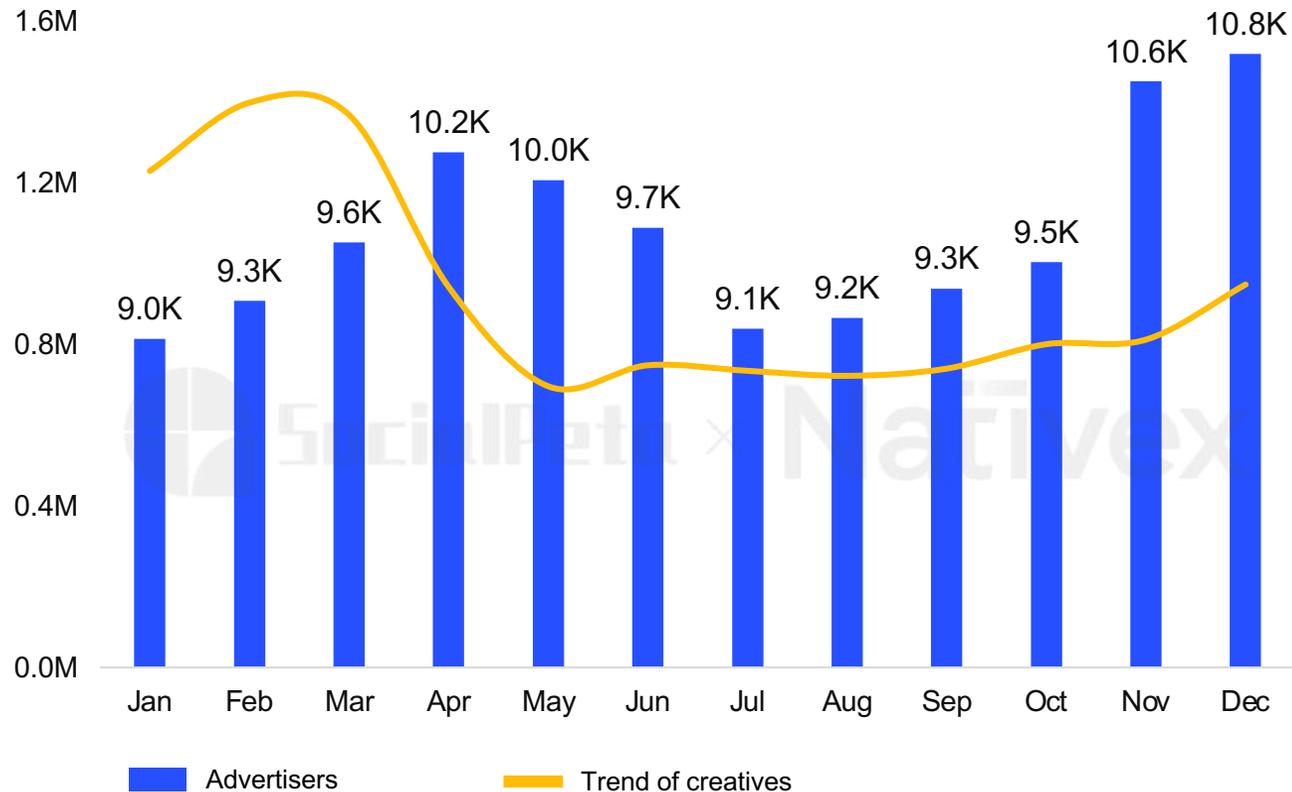
# Overview of Regions Popular with Overseas Mobile Games

The number of advertisers in different regions



The number of advertisers was the largest in North America, and increased in all regions except Southeast Asia compared with that in 2019. North America saw the largest growth rate of 24.16%.

# Popular Countries/Regions—USA



2020 was bound to be an eventful year for the US market. Lockdown brought an unprecedented opportunity of development for the mobile game market, but the pandemic out of control, the circuit breaker triggered three times and the dramatic election year also filled the economic situation of the USA with challenges in 2020.

The number of advertisers was the largest in the US market in November, and a small peak of advertising in H1 appeared in April.

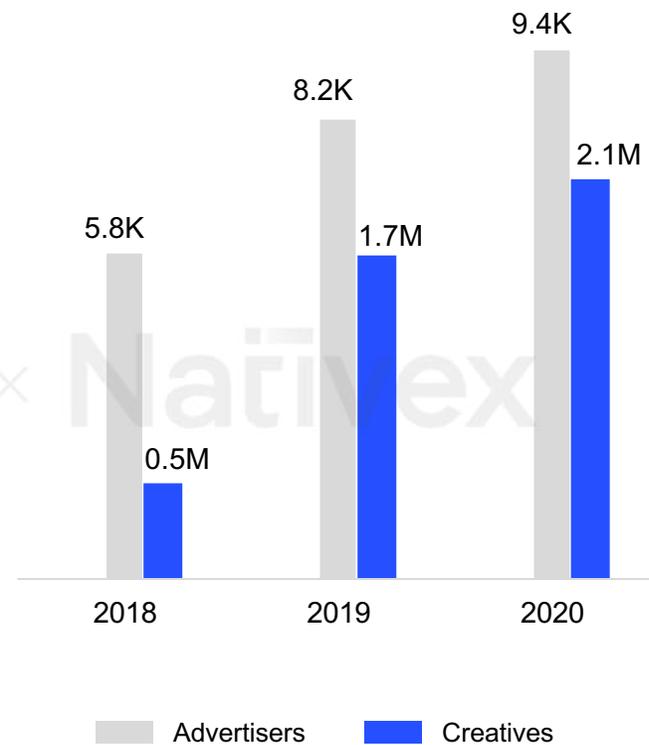
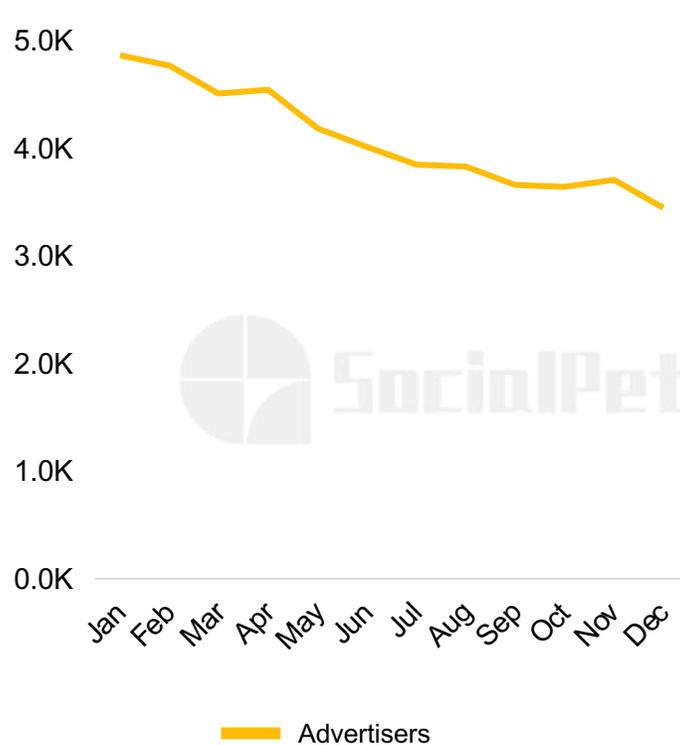
As for the amount of creative, it was obviously higher in Q1 than in others, with 1.3M pieces of creative monthly on average.

# Popular Countries/Regions—Japan

Japan was still among TOP3 of the global mobile game market, with per capita payment of over 170 USD by mobile game players.

In 2020, the number of mobile game advertisers kept declining, with about 4,000 advertisers monthly on average.

The mobile game market of Japan maintained a steady growth trend. The number of advertisers increased by 15.4% year-on-year, and the amount of creative placed rose by 23.8% year-on-year in 2020.

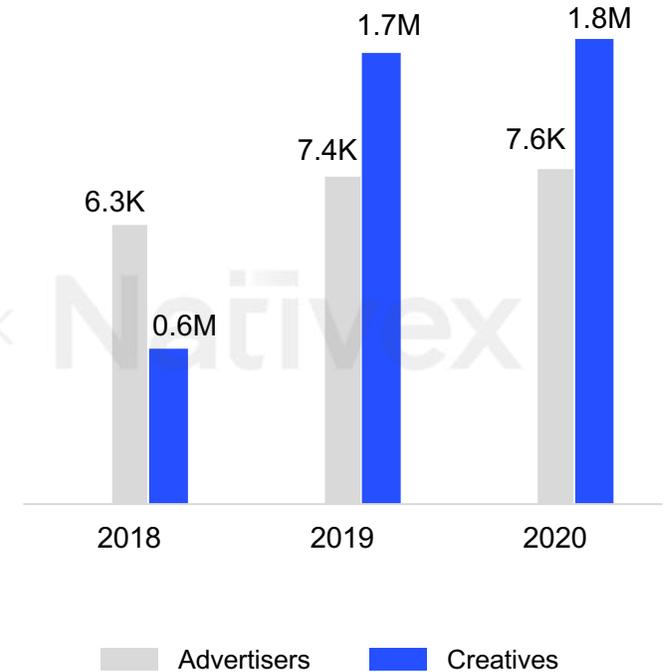
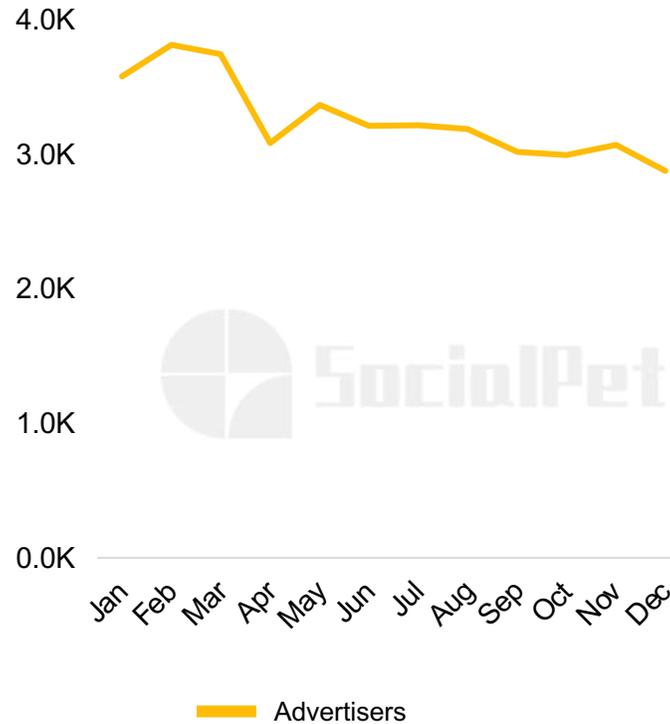


# Popular Countries/Regions—South Korea

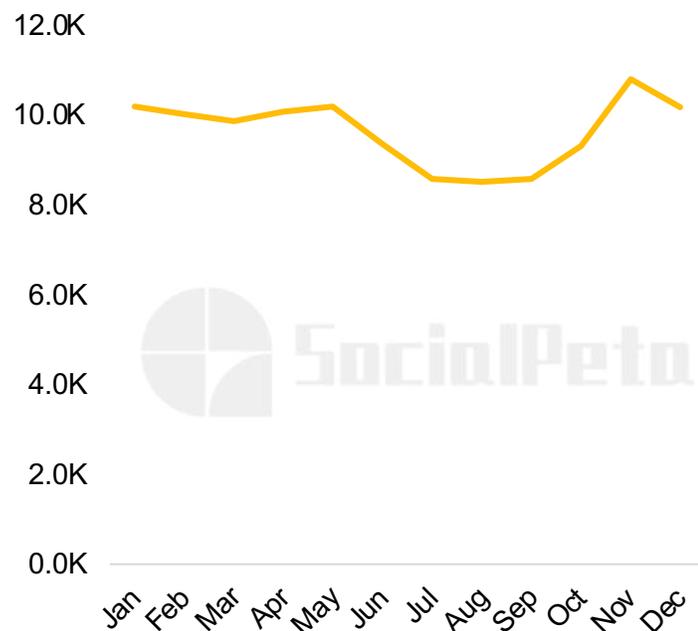
South Korea was the third largest game market in the Asian-Pacific region and the fourth largest around the globe, the scale of which reached 6.2 billion USD and accounted for 8.6% of the Asian-Pacific market. South Korea has a population of over 51 million and 49 million netizens.

In the South Korean market, there were more advertisers in Q1, but the number decreased obviously in April. In the later stage, the number remained steady at about 3,000.

In 2020, overall media buying did not grow significantly, with an increase in the number of advertisers by 3.5% and the amount of creative by 3.1% year-on-year compared with 2019.



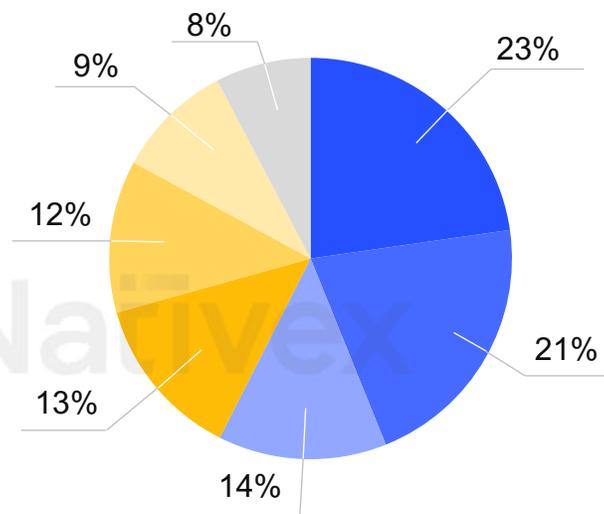
# Popular Countries/Regions—Europe



Advertisers

Countries observed:

France, Germany, UK, Italy, Spain, the Netherlands, Norway, Poland, and Portugal.



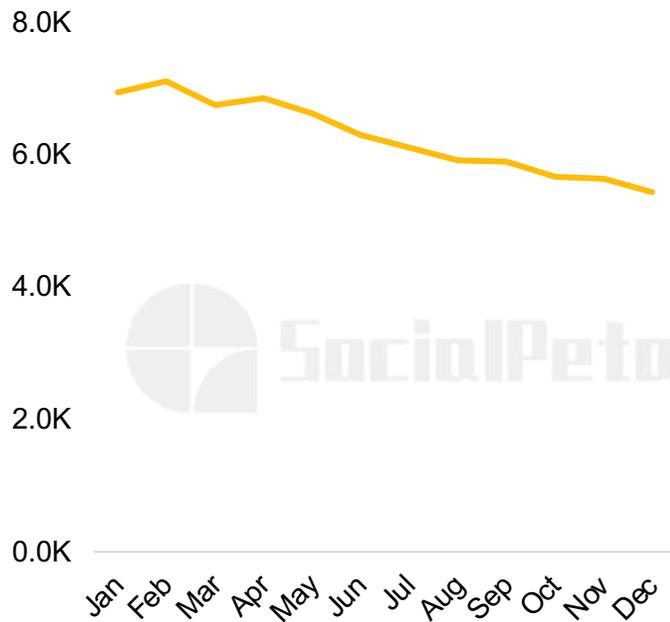
- Puzzle
- Arcade
- Simulation
- Action
- Role-playing
- Strategy
- Adventure

From market size, it can be seen that Europe is not quite a big market, especially when compared with Asia, but the European mobile game market is also a treasured place for overseas operation due to its strong capacity of monetization.

Due to the extremely high popularization of PCs in Europe, competition in hardcore games mainly occurred on PC platforms. Therefore, casual games were preferred in the mobile market, and puzzle advertisers were the largest media buyers, accounting for 23%.

The number of media buying advertisers remained relatively steady in H1, with about 10,000 advertisers monthly on average. The number was declining obviously in Q3 until it gradually returned to the level of H1, but an obvious declining trend appeared in December under the influence of objective conditions.

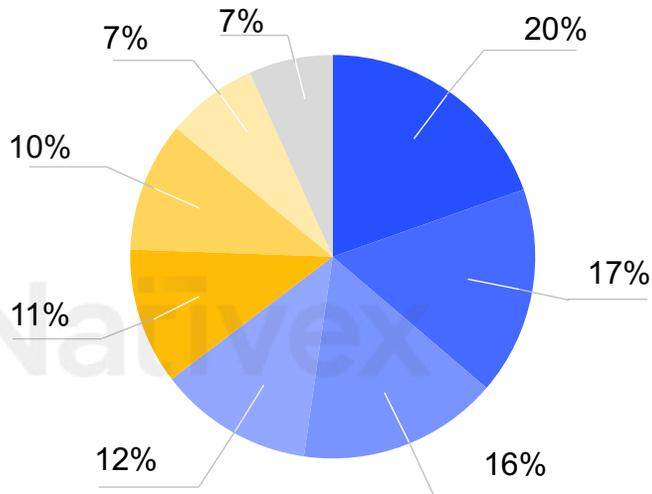
# Popular Countries/Regions—Southeast Asia



Advertisers

Countries observed:

Thailand, Indonesia, Singapore, Malaysia, Vietnam, and the Philippines.



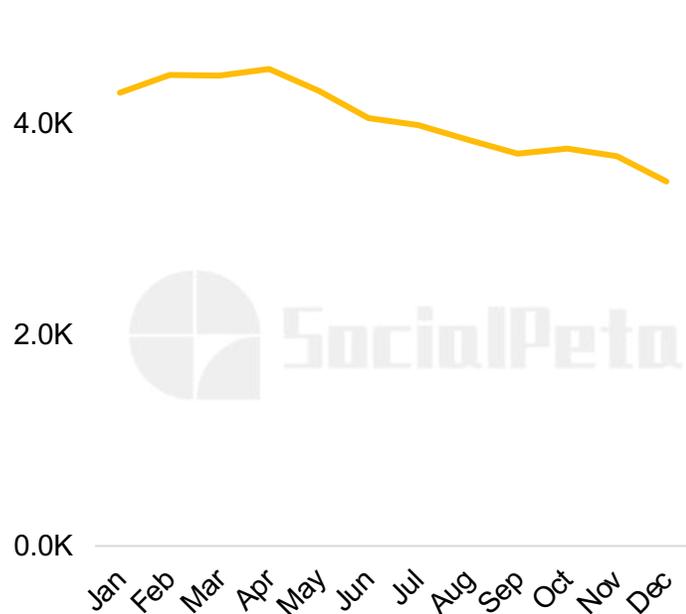
- Puzzle
- Role-playing
- Arcade
- Action
- Simulation
- Strategy
- Card
- Adventure

Southeast Asia, with a population of 600 million in total and 11 countries, is a region where the mobile game industry is growing at a high speed.

In 2020, the number of advertisers showed a trend of decline, reaching about 6,000 on average.

In terms of game types, puzzle advertisers took up one fifth of all games, followed by role-playing and arcade advertisers.

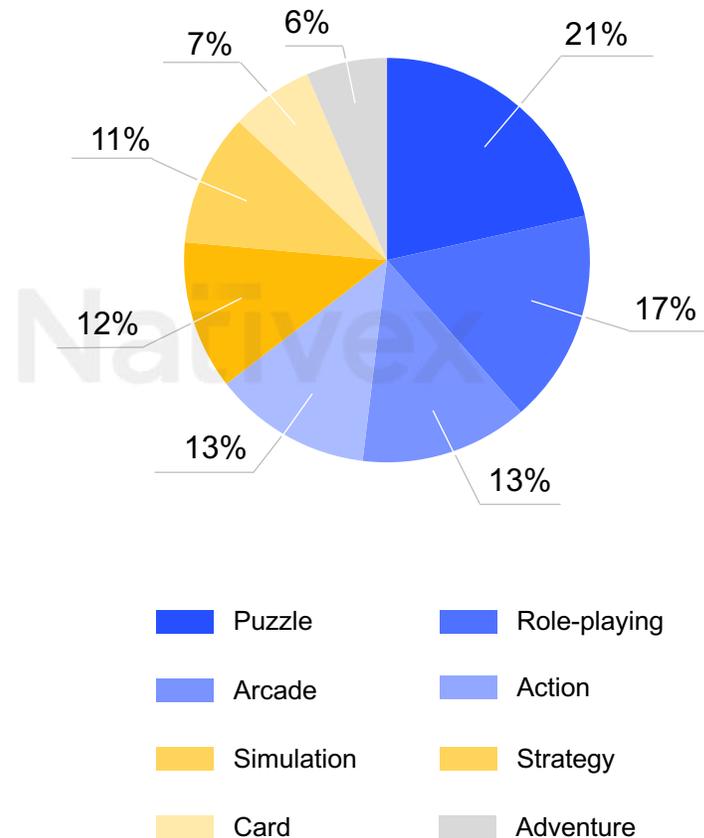
# Popular Countries/Regions—Middle East



— Advertisers

Countries observed:

Bahrain, Qatar, Saudi Arabia, United Arab Emirates, Azerbaijan, Lebanon, Kuwait, Israel, Egypt, and Oman.

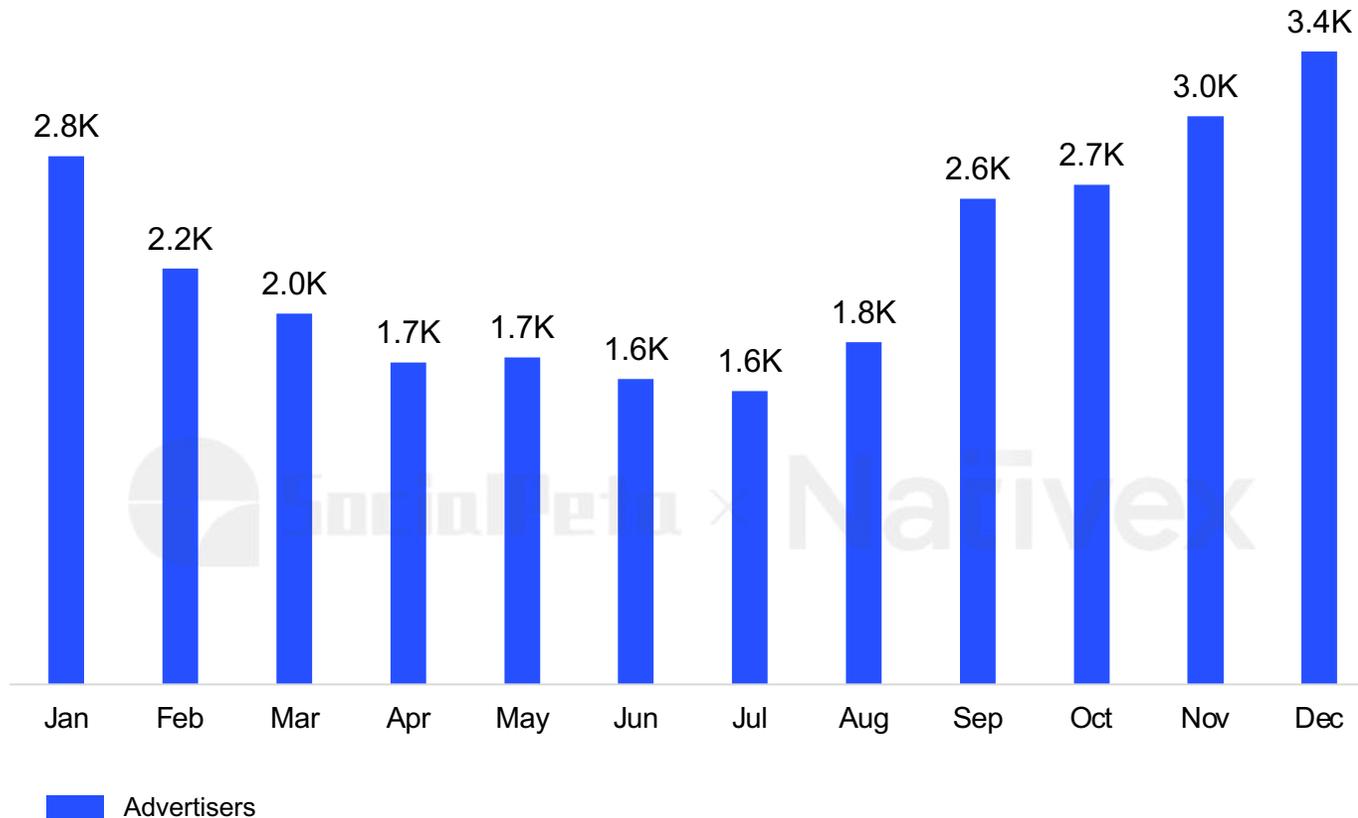


There is a young population in Middle East on the whole, of which nearly 60%~80% are aged below 30. The huge group of young people drives the rapid development of the mobile Internet there.

There were 3,800 advertisers on average monthly in Middle East, and April 2020 saw the largest number of advertisers, but the number of advertisers fell into decline in H2.

As for game types, puzzle creative was the type with the largest number of advertisers, accounting for 21%, followed by the types of arcade and role-playing.

# Popular Countries/Regions—Mainland China

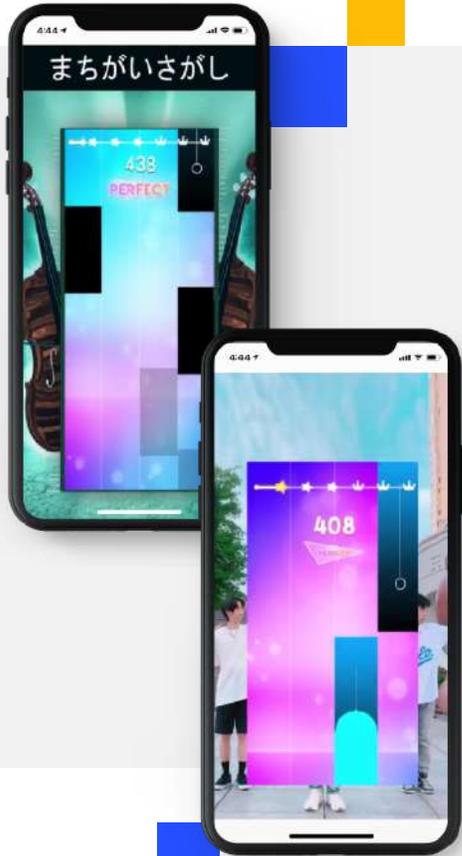


In July 2020, under the influence of the pandemic, the number of media buying advertisers fell into decline, but as China took great measures to prevent the pandemic, the number of advertisers increased significantly in Q3.

With the issue of the ISBN system in 2018, it was winter for the whole game industry of China. Game manufacturers in China cherish each game product with an ISBN, which also resulted in the two development orientations of the game industry, namely “further improvement of product quality” and “refinements of operation”, were truly implemented.

# 04 Excellent Advertisers

# Hyper Casual Game Magic Tiles 3 on the Top of the Music Game List in Japan



Magic Tiles 3 is a music game released by Amanotes, a Vietnamese publisher. It has attracted wide attention around the globe, ranking top on game lists of over 30 countries and music game lists of over more than 150 countries and regions.

## Marketing Dilemma

To maximize conversion rates and get consistently strong retention rates with the power of our high-quality creatives, we decided to customize a TikTok campaign for the game and focused on these key areas:

- Extensive testing: we ran a comprehensive A/B testing phase to look at various elements including creative format, time of day, song choice, etc., to ensure we take the creative direction that reaches the best conversion rates.
- Specific timing: We defined what the key engagement times would be and focused our campaign pushes around them. Once we identified peak DAU periods, we adjusted bids and volume for further optimization.
- Ad creative and song pairing: To ensure maximum exposure and engagement, we looked at the most popular songs on TikTok and leveraged their appeal. We paired top songs on the platform with our ad creatives throughout the campaign and continued refining the process to increase conversions.
- Special tactics: To get maximum exposure and increase its user base, we targeted specific holidays/events, and paired popular TikTok songs with specific creatives to increase campaign performance & downloads.

Through above marketing strategies and practice, Nativex decreased CPI by 30%+ on the basis of achieving goals. Meanwhile, with a significant increase in exposure, Magic Tiles 3 successfully ranked **TOP 1** of the music game list in Japan.

# How the RPG Mobile Game Reign of Dragon Opened the Thai Market from Scratch

Reign of Dragon is a role-playing game released by WeGames. The game features a dark magic style, and includes cards of heroes in many legends.



Contextual social dialogue + game characters generated over 2.6 million impressions



The beauty-related creative generated over 700,000 impressions



KOL commentary generated more than 600,000 impressions

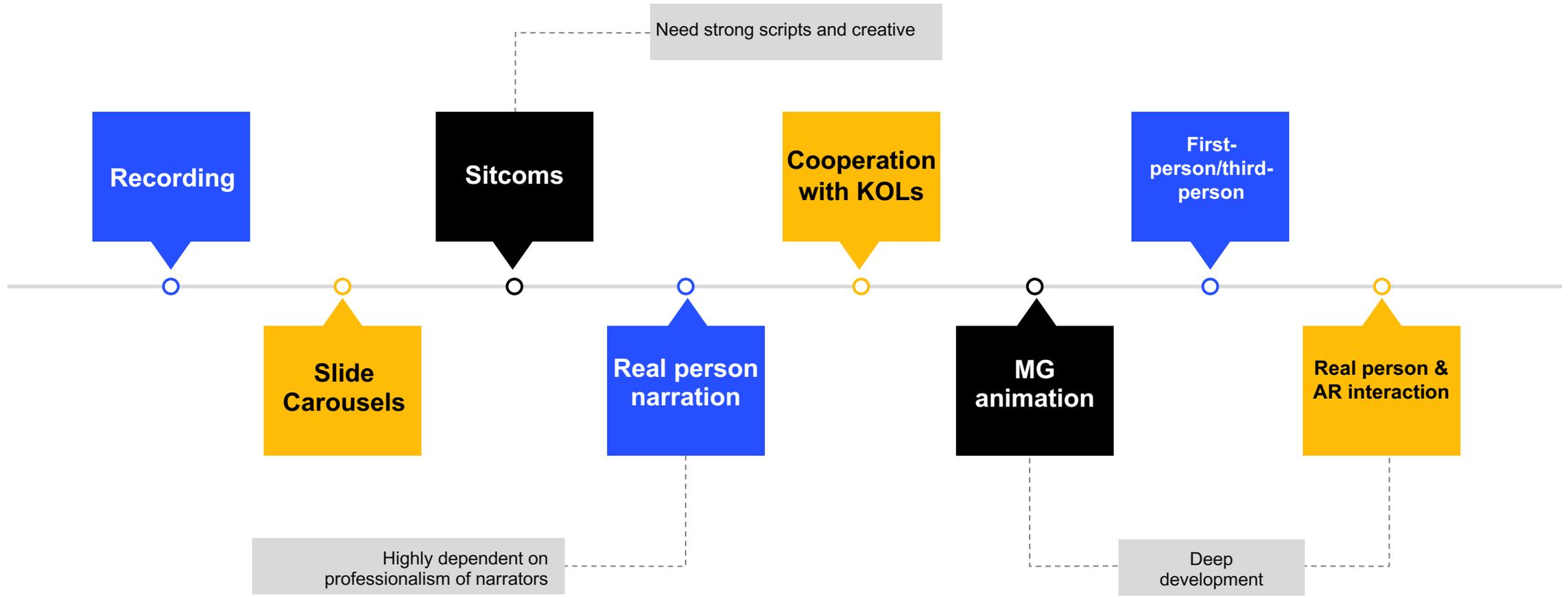
## Marketing Dilemma

- One month before launch: We introduced related topics on Facebook and other social platforms, using fan pages to generate attention and discussions. We used an optimized combination of ad creatives including campaign plots, battle scenes, popular characters, and more.
- Pre-registration phase: We increased our advertising efforts on Google UAC and we directed users who showed interest in the game to pre-register – this served as the first wave of high-quality users for the game’s launch phase. We also improved the quality of our creatives and included new elements such as contextual dialogue, beautiful characters, cute pets, and more, while continuing our optimization efforts.
- Launch phase: Once the game was officially launched, we worked on getting traffic by running ads on Facebook, Google, and other major media platforms, while also using influencers (also known as KOLs) to give the game a boost in exposure. We selected a number of popular KOLs from Thailand and we worked together with them to optimize the campaign content.

**Nativex helped Reign of Dragon attract wide attention at the beginning of entering the Thai market, as well as reduced CPI by 30% compared with the expected value.**

**05** High-quality  
Creative

# The Form and Direction of Common Short Video Creative



# Game Creative Display — Screen Recording

## First-person display of game screen

Game screen recording usually targets **selecting roles, changing outfits, combats, plots** etc., to attract users by highlighting distinctive features of games;

**Screen recording of exciting combats or special effects in games + auto-tune remix-themed narrations or a rhythmic background** can effectively attract user attention and obviously improve the click-through rate.

On the right is an example of using **high-definition videos + impassioned music + additional special effects** to highlight special features of the game; high-definition videos can not only provide visual enjoyment, but also improve user trust in the game.



# Game Creative Display — Screen Recording (Hyper Casual Gameplay Creative)

A trend of hyper casual games started and swept across the globe at the end of 2019. Though the segmented market tends to be steady, hyper casual games still maintained great popularity in 2020 due to relatively low costs of development and simple gameplay.

The gameplay of hyper casual games usually originates from simple daily activities, so the gameplay that can intuitively represent game ideas is often used. Then, this basic type of creative needs minor optimization to improve performance.

## Common Game Type:

Casual Games (Hyper Casual Games)

## Creative Advantages

Direct display of creative gameplay to players, especially for hyper casual games dominated by creative gameplay.

## Creative Disadvantages

High dependence on gameplay, with fewer ways to optimize creative.

Arouse user interest through text



Induce users to interact at the end of a game demo

Mix real and game scenes



# Game Creative Display — Real Person Creative

Due to the psychological convergence of mankind, it is often the most intuitive way to recommend a game through gameplay experience of others. On this basis, real person creative is frequently used by major advertisers, to bring traffic by KOLs and attract players by practical gameplay experience of real persons or plots.



Players try playing games



KOLs recommend games



Live action of special Chinese games

## Common Game Types:

Midcore and hardcore games such as RPG and SLG

## Creative Advantages:

Real players playing games makes viewers feel deeply immersed, and real person KOLs can also bring extremely high traffic to games.

## Creative Disadvantages:

It sets requirements for performances of actors and needs to balance live action and game display.

# Game Creative Display — Game Plots

## Design Plots Based on Game Scenes/Elements

High-quality plots should be **based on game features**, and embarrassing talk irrelevant to game features not only embarrasses users but also cannot keep coherence of games;

First, **game features to be highlighted** in videos should be specified.

Is it nostalgic or interesting?



# Game Creative Display — Highly Interactive Puzzle Creative

The creative originated from a game named *Hero Wars*, produced and released by a company in Cyprus. This type of creative helped the product with relatively common profitability to achieve rapid growth in downloads and traffic. Therefore, the type of creative with slightly casual gameplay but a gap from core gameplay has been a magic weapon for many manufacturers to achieve growth.

## Common Game Types:

Midcore and hardcore games

## Creative Advantages:

Creative boasts a strong click triggering property, with good data performance on the whole.

## Creative Disadvantages:

Creative may be deemed fraud in some regions.



Pull-tab Puzzle



Waterpipe  
Connection  
Puzzle



Dungeon Pass Puzzle

# Side Story

Opinion Forecast

## With a Significant Change in the Pattern of Media Buying, KOLs and Influencers Will Be Popular Creative

Data shows that media buying of the global mobile app market still maintained a strong growth trend in 2020. From the amount of creative, it can be seen that the ratio of game to non-game apps was 2:8, and video creative was still the first choice for game advertisers, accounting for over 60% of the total. Moreover, with exceedingly hot short videos and live streams driven by the “stay at home economy”, it can be predicted that KOLs and influencer will be hot types of creative in media buying of game advertisers in the future. On the one hand, KOLs and influencers are producers of in-depth contents for game products, and communication channels joining players and manufacturers with more interactive relevant extensions; on the other hand, KOLs and anchors also improve the “onlooker economy” of game products to a certain extent — In fact, the number of people watching game live streams has been nearly equal to that of game players in recent years. Besides, more popular short videos and real person creative also indirectly prove the popular trend of KOL and influencer creative.



# With the Emergence of “Sheconomy”, Compound Gameplay Have Better Prospects

Global spread of COVID-19 has not only catalyzed the boom of the “stay at home economy”, but also played a role in driving the “Sheconomy” and the live stream economy. Under the pressure of brick and mortar industries nearly brought to a standstill, previously neglected group forces have shown up in the mobile field.

## Female-oriented Games May Become a Hit

Data shows that in a world population of 7 billion, there are 2.7 billion game players, of which 1.2 billion are female, accounting for nearly 45%. From *Travel Frog* to *Animal Crossing: New Horizons*, female-oriented games became popular at such a speed and to such a degree that major game companies felt obliged to shift their attention to this track. From the current market, it can be seen that the female-oriented market has great potential to become a hit.

## Compound Gameplay Has Better Prospects

After a period of explosive growth, hyper casual games and casual games gradually cooled down and welcomed a round of gameplay upgrades by game manufacturers. For example, many manufacturers of casual match games began to try the gameplay of mixing “match 3 + idle” and achieved good effects at the initial stage. In the future, casual games may walk towards a new generation of more integrated gameplay. In the short term, games of “casual gameplay + practical science popularization” have certain popularity in the market, such as products focusing on improving skills in establishing relationships, popularizing life experience and knowledge of health, which will be more popular and recommended by players.



# 2020 Global Mobile Market Review

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**NON-GAME**

# Preface—Embrace the “Black Swan”, Seize “New Opportunities”

We will wave goodbye to “the darkest 2020”, but a coin has two sides. The “black swan” constantly refreshing our panic level also brought a rare window period to the mobile market and the online economy, while disrupting the global financial environment and our daily life.

COVID-19 not only caused economic impacts, but also affected mobile advertising. Global media buying fluctuated with the pandemic, but the decline trend was slightly reversed in September. Static creative such as images and carousels were popular, and Toutiao, Baidu, Qutoutiao, Tencent Social Ads, Facebook, Instagram, Audience Network, Messenger and Google Ads were still hot channels.

The number of new online office, education, social contact, entertainment and shopping apps and new users showed explosive growth. Live stream marketing boosted by ecommerce also promote the use of video and shopping apps in length of time and depth, cultivating user habits.

Panic about the unknown virus made people pay more attention to healthcare and local life. Tool, news and finance apps mainly for healthcare, information sharing and wealth management respectively rose to a historic high in terms of downloads and frequency of use, while travel, hotel and show ticketing apps obviously weakened in historical records.

Here, SocialPeta and Nativex will jointly present a review of global mobile non-game app market data and a trend forecast, to provide references for people in the field of the mobile Internet and relevant market participators.

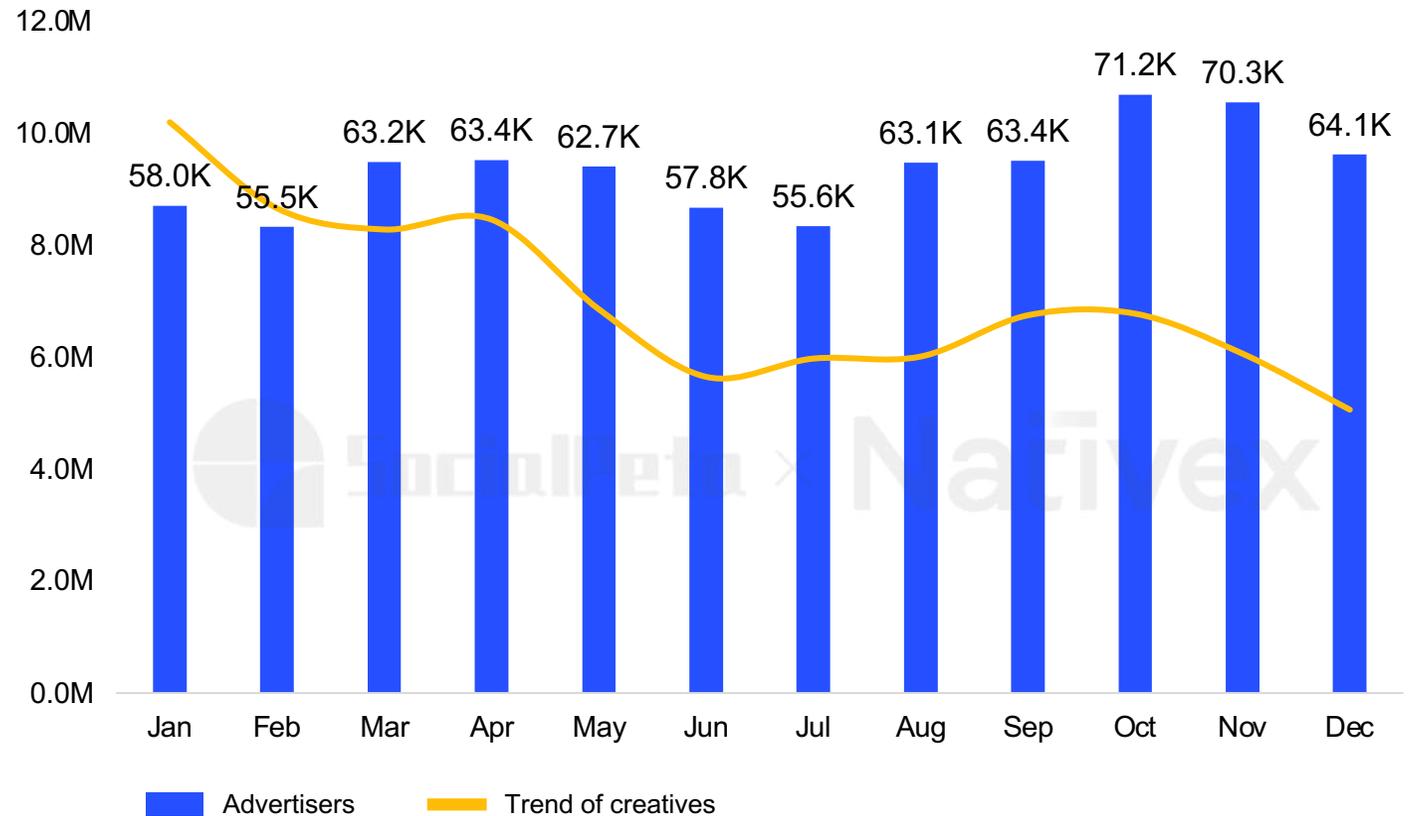
# 01 2020 Global Media Buying and Opinions

## 2020 Trend of Global Non-game Advertisers

SocialPeta fetched over 200,000 non-game advertisers around the globe cumulatively and accumulated over 50 million pieces of creative all year round, to observe the trend of media buying in 2020.

The number of advertisers reached a peak in October 2020, when the cumulative number of non-game advertisers exceeded 70,000. There were two small peaks in April and October 2020 respectively.

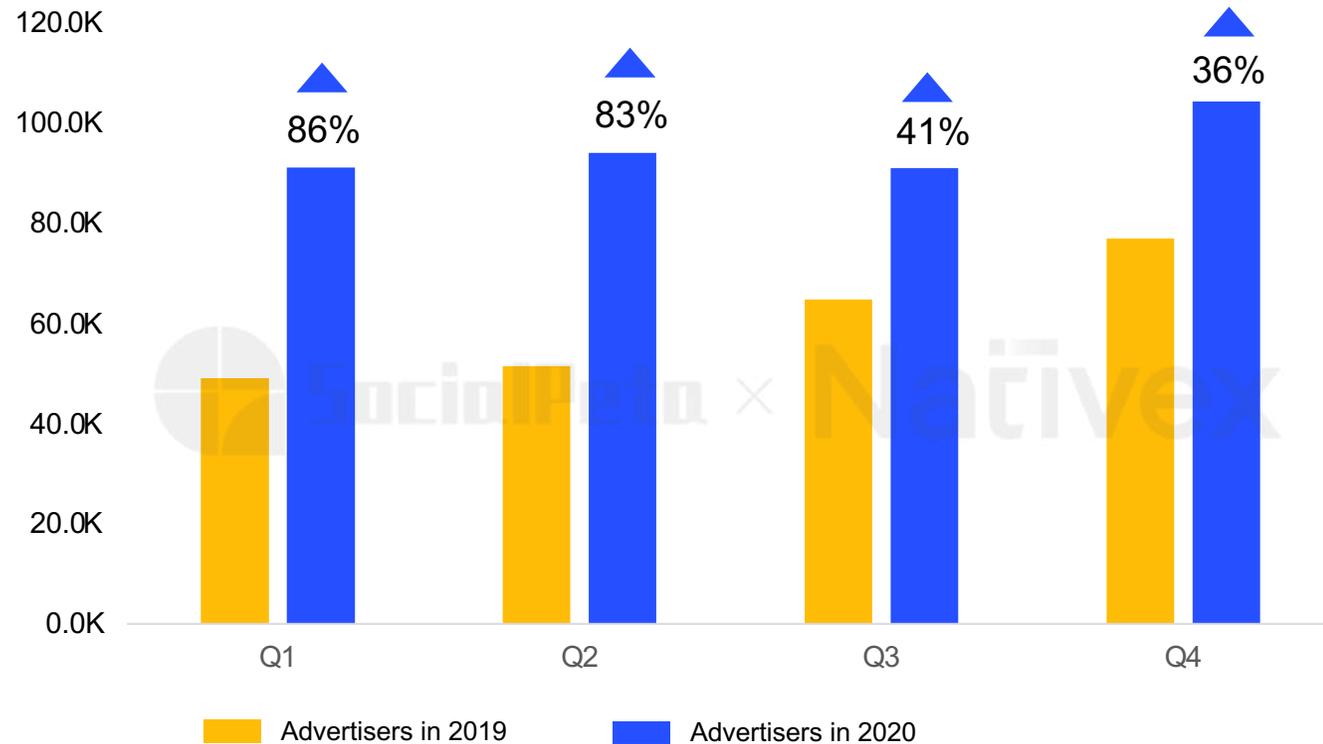
The amount of all creative placed showed a declining trend, but the decline was slightly reversed in September.



# Changing Trend of Non-game Advertisers from 2019 to 2020

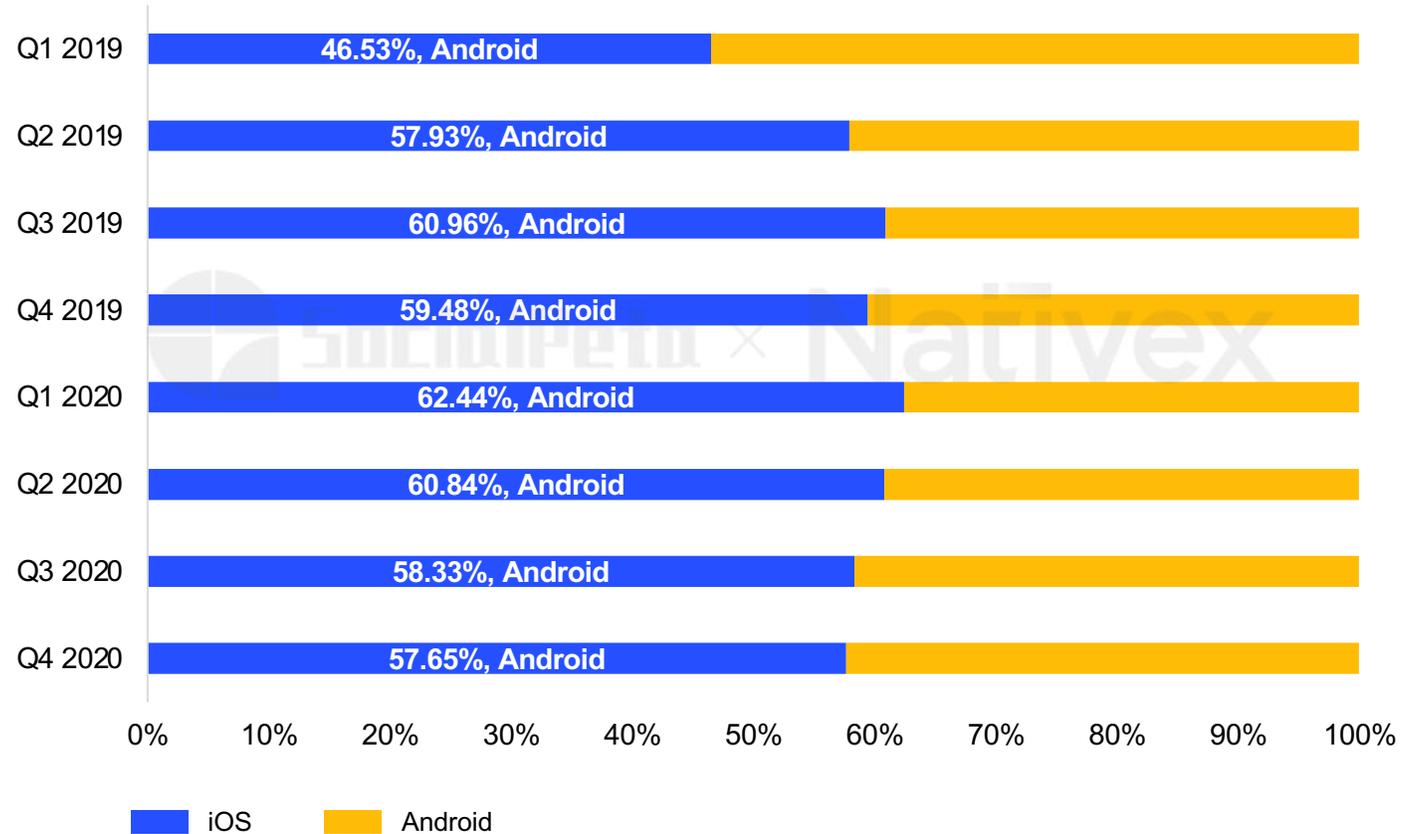
The number of advertisers increased by 60.1%, compared with that in 2019.

There was a significant increase in H1, and the growth rate exceeded 80% in Q1 and Q2 year-on-year. It retained relatively strong growth in H2.



# Proportion Trend of Android & iOS Advertisers

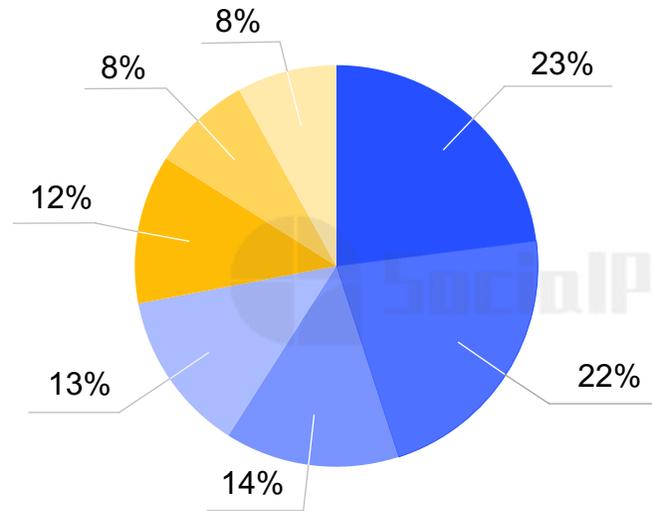
Android advertisers accounted for the lowest proportion of 46.53% in Q1 2019, but then kept increasing. Their proportion was 62.44% in Q1 2020, and then rose modestly. Now, Android and iOS advertisers maintain a ratio at about 6:4.



# Various Types of Non-game Creative

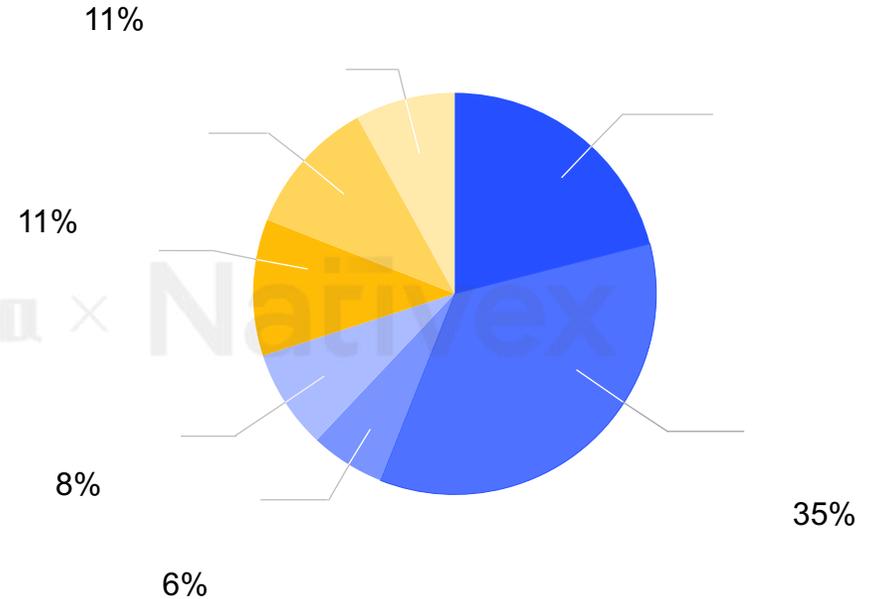
Among all non-game advertisers, lifestyle advertisers were the most, accounting for 23%; in terms of creative types, shopping creative ranked top with a proportion of 35%.

Proportions of various types of non-game advertisers



- Lifestyle
- Shopping
- Finance
- Tool
- Entertainment
- Education
- Efficiency

Proportions of various types of non-game creative



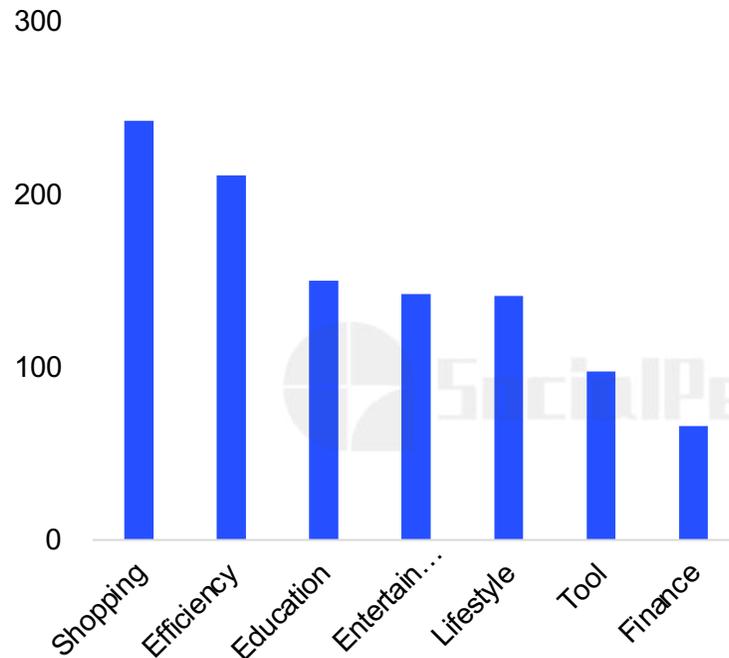
- Lifestyle
- Shopping
- Finance
- Tool
- Entertainment
- Social Contact
- News

# Various Types of Non-game Creative

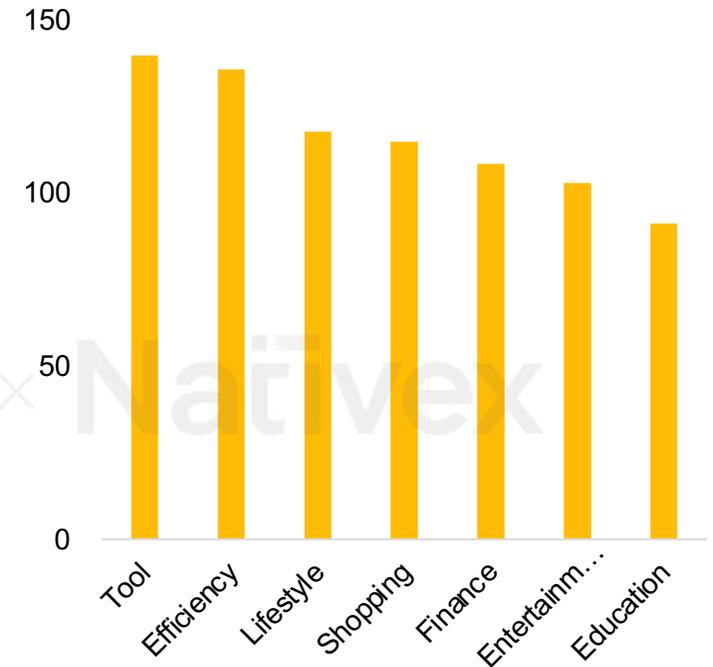
From the amount of media buying, shopping apps were the largest media buyers in 2020, with each advertiser placing over 200 pieces of creative annually on average.

From appreciation value of all creative, creative of tool apps was the most popular with users, with each piece on average gaining high popularity.

Average amount of creative=Amount of various types of creative/Quantity of various types of advertisers



Average popularity of creative=Total popularity of various types of creative/amount of various types of creative



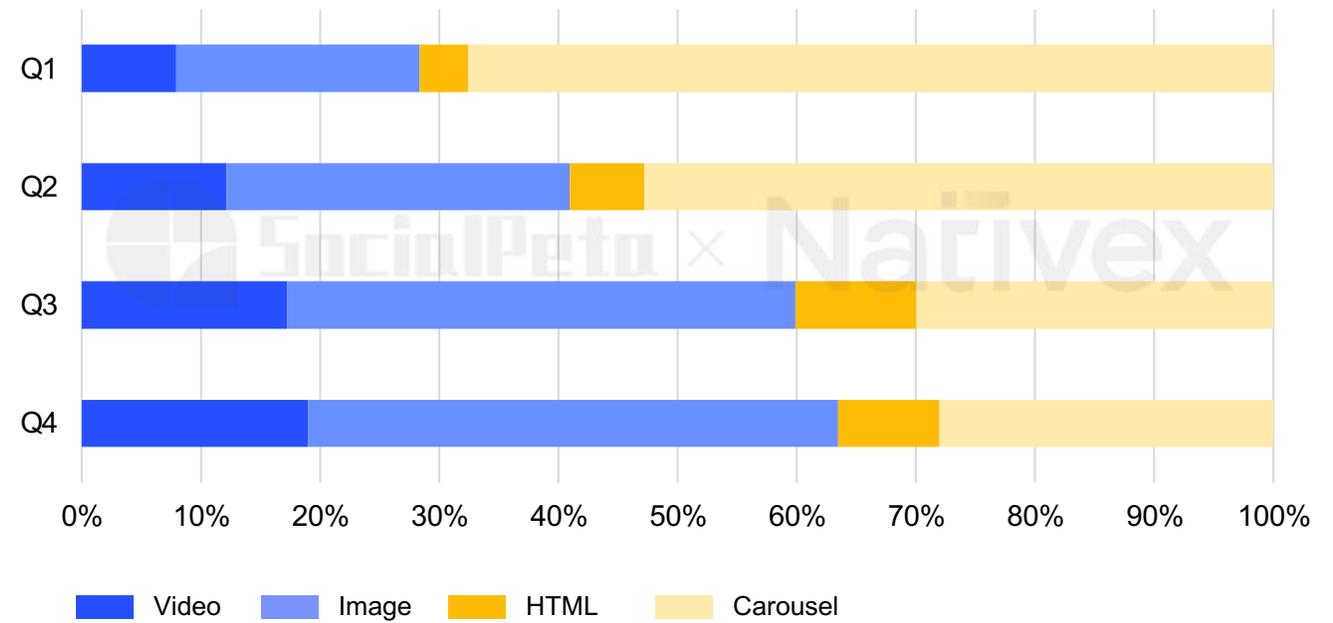
# Types of Creative Placed

Non-game apps prefer static creative of images or carousel. The proportions of carousel creative once exceeded 50% in Q1 and Q2.

The proportion of image creative increased significantly, to 44.45% in Q4.

Video creative did not have absolute advantages like game apps, but its proportion also kept rising in 2020, to 19.2% in Q4.

Proportion trend of various types of creative



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**NON-GAME**

# 02 Global Popular Channels

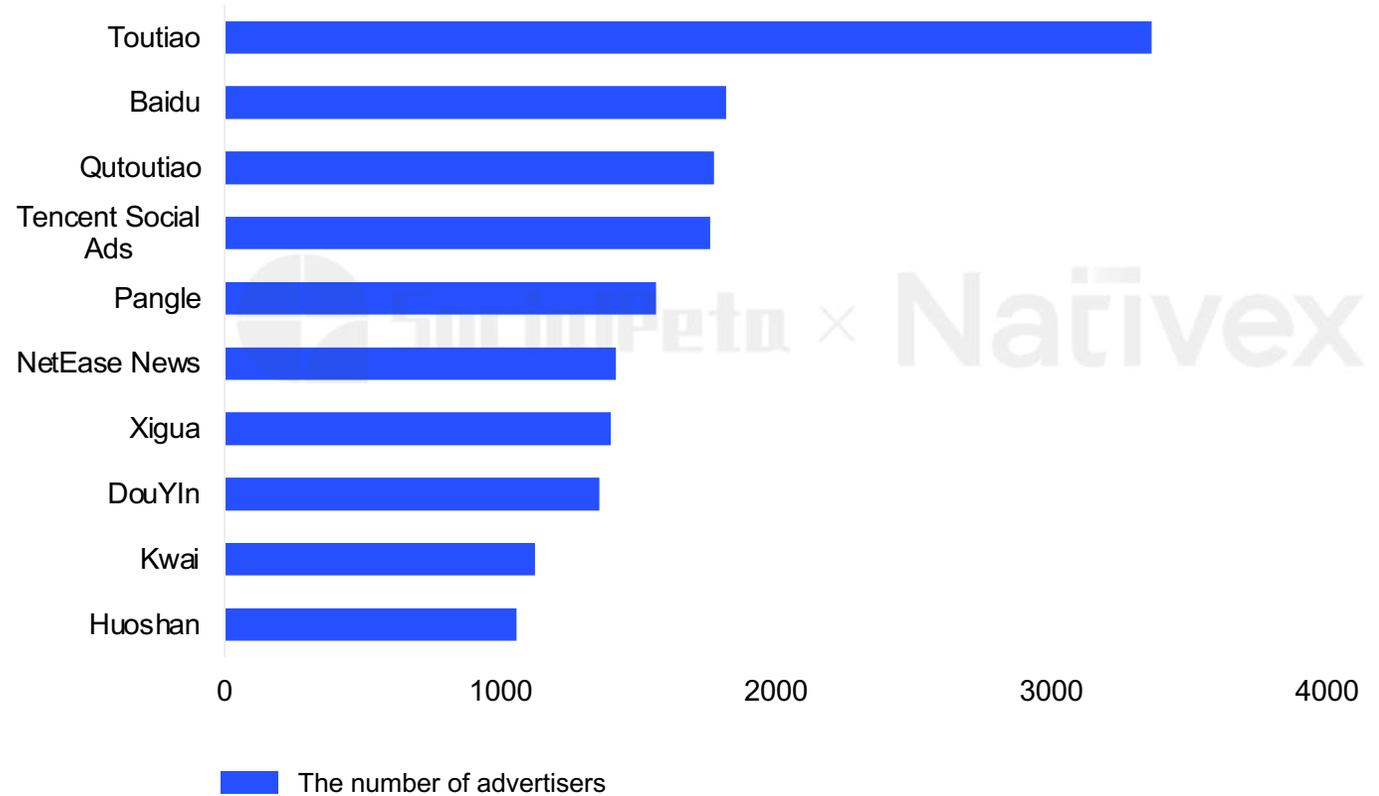
# Hot Channels in China

TOP5 channels were Toutiao, Baidu, Qutoutiao, Tencent Social Ads and Pangle.

In China, Toutiao series channels were also widely popular with non-game advertisers, contributing 4 of the TOP10 channels, of which Toutiao ranked top with over 3,000 advertisers.

TOP10 hot channels in China

Sorted by the number of advertisers



## TOP30 Media Buyers in China (Sorted by the Amount of Creative Excluding Repeated Pieces)

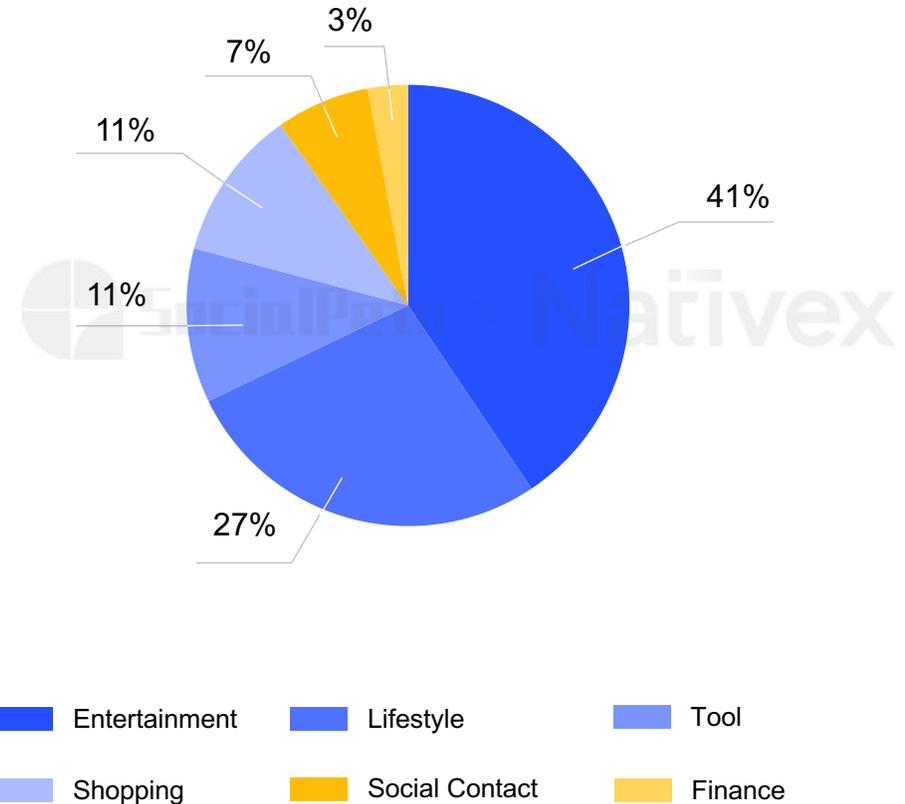
| Ranking | Advertiser              | System  | App Type   | Ranking | Advertiser                    | System  | App Type       |
|---------|-------------------------|---------|------------|---------|-------------------------------|---------|----------------|
| 1       | Douyin                  | Android | Video      | 16      | 连尚读书                          | Android | Novel          |
| 2       | ke.com                  | iOS     | Property   | 17      | JD HD                         | iOS     | Shopping       |
| 3       | Anjuke                  | Android | Property   | 18      | Danke                         | Android | Property       |
| 4       | Douyin Speedy Version   | Android | Video      | 19      | Super Clean Master            | Android | Tool           |
| 5       | Pinduoduo               | Android | Shopping   | 20      | Clean Master                  | Android | Tool           |
| 6       | Kwai                    | Android | Video      | 21      | Mobile Manager Speedy Version | Android | Tool           |
| 7       | Anjuke                  | iOS     | Property   | 22      | Pinlian520                    | Android | Social Contact |
| 8       | 东<br>JD                 | Android | Shopping   | 23      | Weibo                         | Android | Information    |
| 9       | bilibili                | Android | Video      | 24      | ziroom                        | Android | Property       |
| 10      | Taobao (mobile)         | Android | Shopping   | 25      | Super Clean Master            | Android | Tool           |
| 11      | Kwai                    | Android | Video      | 26      | Pinduoduo                     | iOS     | Shopping       |
| 12      | Fanqie Mianfei Xiaoshuo | Android | Novel      | 27      | Duizhuang                     | Android | Shopping       |
| 13      | fengfuxiaoshuo          | Android | Novel      | 28      | Ipalfish                      | iOS     | Education      |
| 14      | Qimao                   | Android | Novel      | 29      | Huoshanzhibo                  | Android | Live Stream    |
| 15      | Dongchedi               | Android | Automobile | 30      | Kwai                          | iOS     | Video          |

# Hot Channels in China—Toutiao

Compared with app advertisers, game advertisers preferred information platforms, in which Toutiao was a very popular channel.

On the whole, top apps were still dominated by products of ByteDance. In all types of creative, entertainment and lifestyle creative accounted for nearly 70% in total.

| TOP3 Hot Advertisers   | Developers                    | App Types  |
|--|-------------------------------|------------|
|  Douyin     | ByteDance                     | Video      |
|  Dongchedi | ByteDance                     | Automobile |
|  Qimao    | Shanghai Qimao Cultural Media | Novel      |



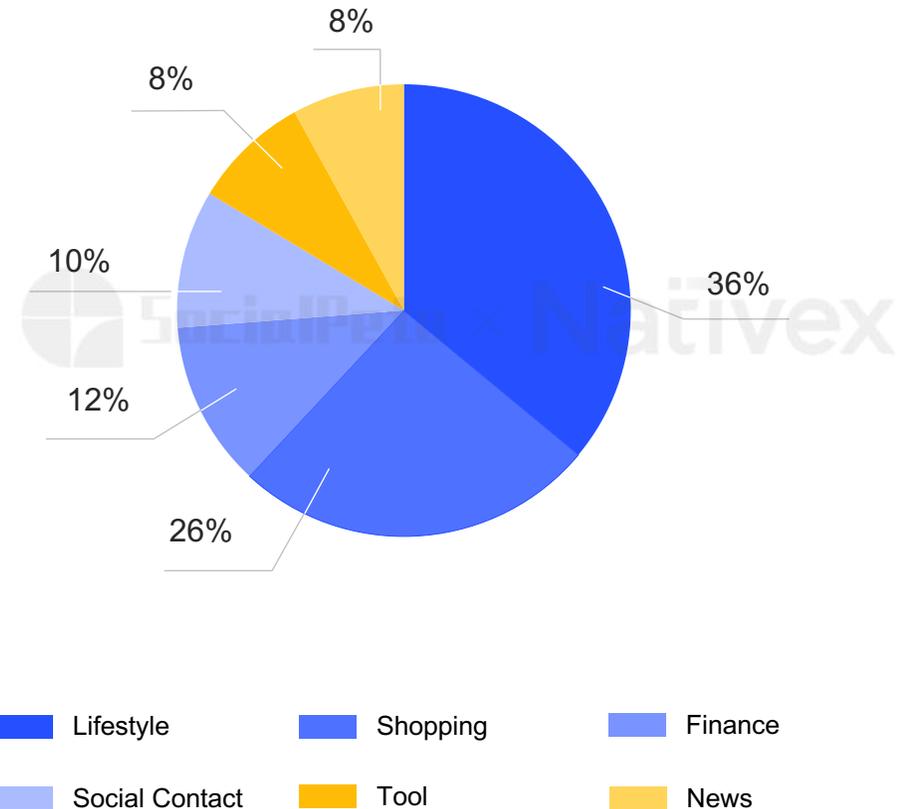
# Hot Channels in China—Baidu

As a search engine platform with the largest number of users in China, it was preferred by tool advertisers.

Lifestyle and shopping creative accounted for a higher proportion of over 60% in total on this channels.

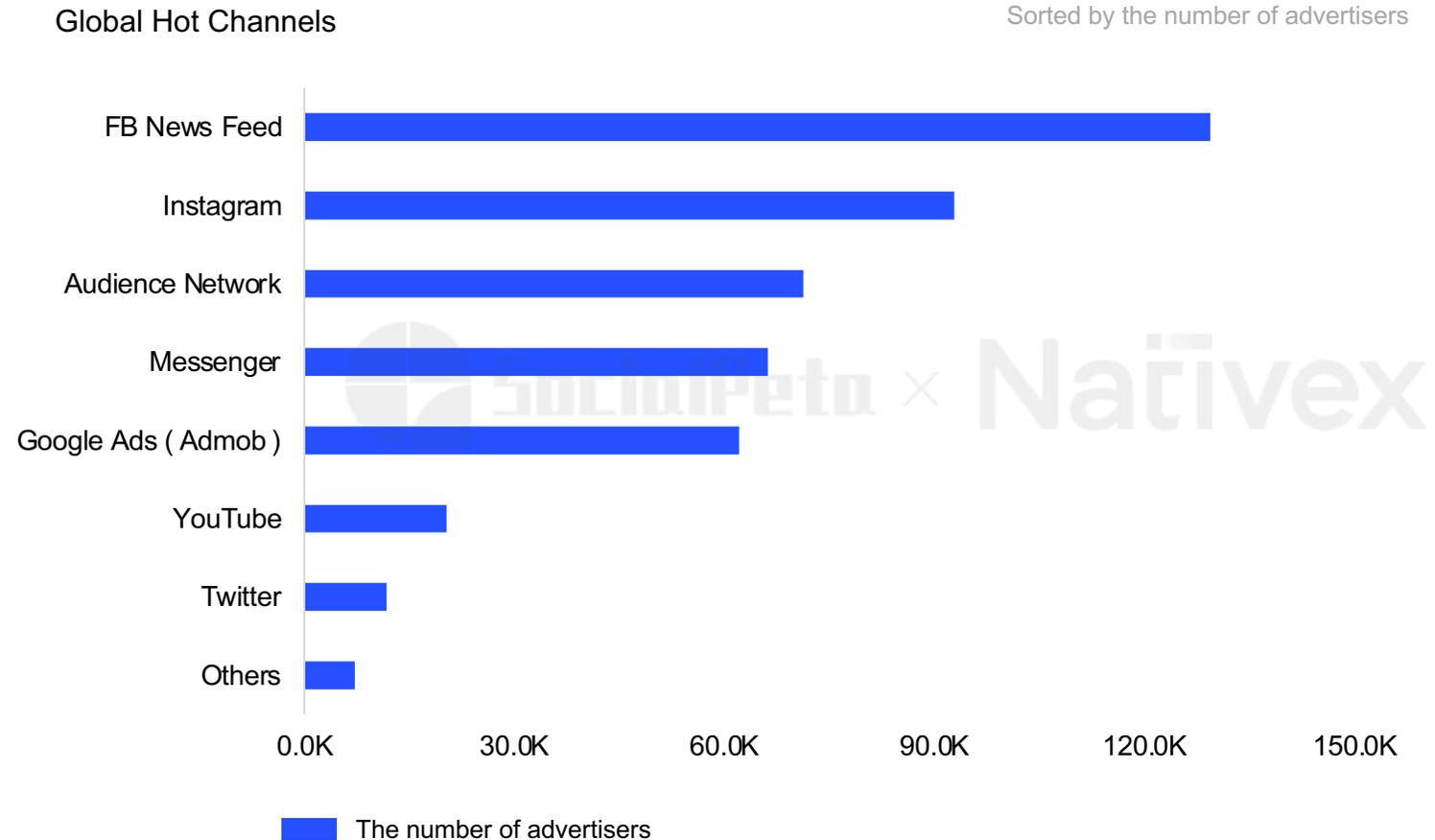
## TOP3 Hot Advertisers      Developers      App Types

|   |           |   |          |
|---|-----------|---|----------|
|    | Anjuke    | Shanghai Ruijia Information Technology Co., Ltd.  | Property |
|   | ke.com    | Beike Zhaofang Science and Technology Co., Ltd.   | Property |
|  | Pinduoduo | Shanghai Xunmeng Information Technology Co., Ltd. | Shopping |



# Global Hot Channels

As for overseas advertising of non-game apps, TOP5 were FB News Feed, Instagram, Audience Network, Messenger and Google Ads (Admob), of which FB series channels boasted absolute advantages, with FB News Feed on the top advertising over 120,000 non-game apps cumulatively.



## TOP30 Global Media Buyers (Sorted by the Amount of Creative Excluding Repeated Pieces)

| Ranking | Advertiser                | System        | App Type      | Ranking | Advertiser                     | System        | App Type |
|---------|---------------------------|---------------|---------------|---------|--------------------------------|---------------|----------|
| 1       | Wish                      | iOS + Android | Shopping      | 16      | Namshi Online Fashion Shopping | iOS + Android | Shopping |
| 2       | News Break                | iOS + Android | News          | 17      | Yemeksepeti: Food & Grocery    | iOS           | Gourmet  |
| 3       | AliExpress                | iOS + Android | Shopping      | 18      | Joom. Shopping for every day   | Android       | Shopping |
| 4       | Shopee                    | iOS + Android | Shopping      | 19      | Hepsiburada                    | iOS           | Shopping |
| 5       | Trendyol                  | iOS + Android | Shopping      | 20      | Viu                            | Android       | Video    |
| 6       | Daraz Online Shopping App | iOS + Android | Shopping      | 21      | Zalando                        | Android       | Shopping |
| 7       | SHEIN                     | iOS + Android | Shopping      | 22      | n11.com                        | Android       | Shopping |
| 8       | Lazada                    | iOS + Android | Shopping      | 23      | Amazon Móvil                   | iOS           | Shopping |
| 9       | JUMIA Online Shopping     | Android       | Shopping      | 24      | Elabelz Shopping               | iOS           | Shopping |
| 10      | Gaana Music               | iOS           | Music         | 25      | Kwai                           | Android       | Video    |
| 11      | WhatsApp Messenger        | iOS           | Communication | 26      | Souq.com                       | Android       | Shopping |
| 12      | Alibaba.com               | iOS + Android | Shopping      | 27      | SnackVideo                     | Android       | Video    |
| 13      | JUMIA Online Shopping     | iOS           | Shopping      | 28      | Hepsiburada                    | Android       | Shopping |
| 14      | Modanisa                  | iOS + Android | Shopping      | 29      | Jollychic                      | Android       | Shopping |
| 15      | Club Factory              | Android       | Shopping      | 30      | Likee                          | Android       | Video    |

# Global Hot Channels—FB News Feed

Among all types of creative, creatives of shopping apps accounted for a half of this channel, followed by lifestyle creative with a proportion of 23%.

Countries popular with advertisers were the USA, the UK and Canada.

## TOP3 Hot Advertisers

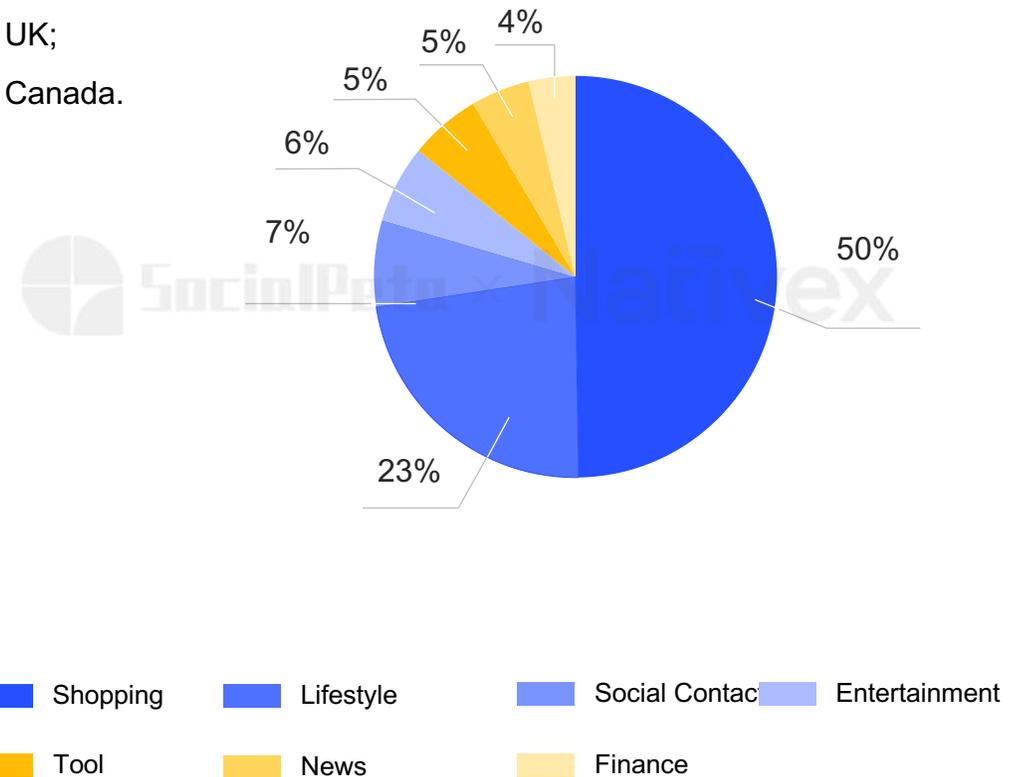
## Developers

## App Types

|   |                    |                     |                      |
|---|--------------------|---------------------|----------------------|
|    | News Break         | Particle Media Inc. | News and Information |
|   | Wish               | Wish Inc.           | Shopping             |
|  | WhatsApp Messenger | WhatsApp Inc        | Communication        |

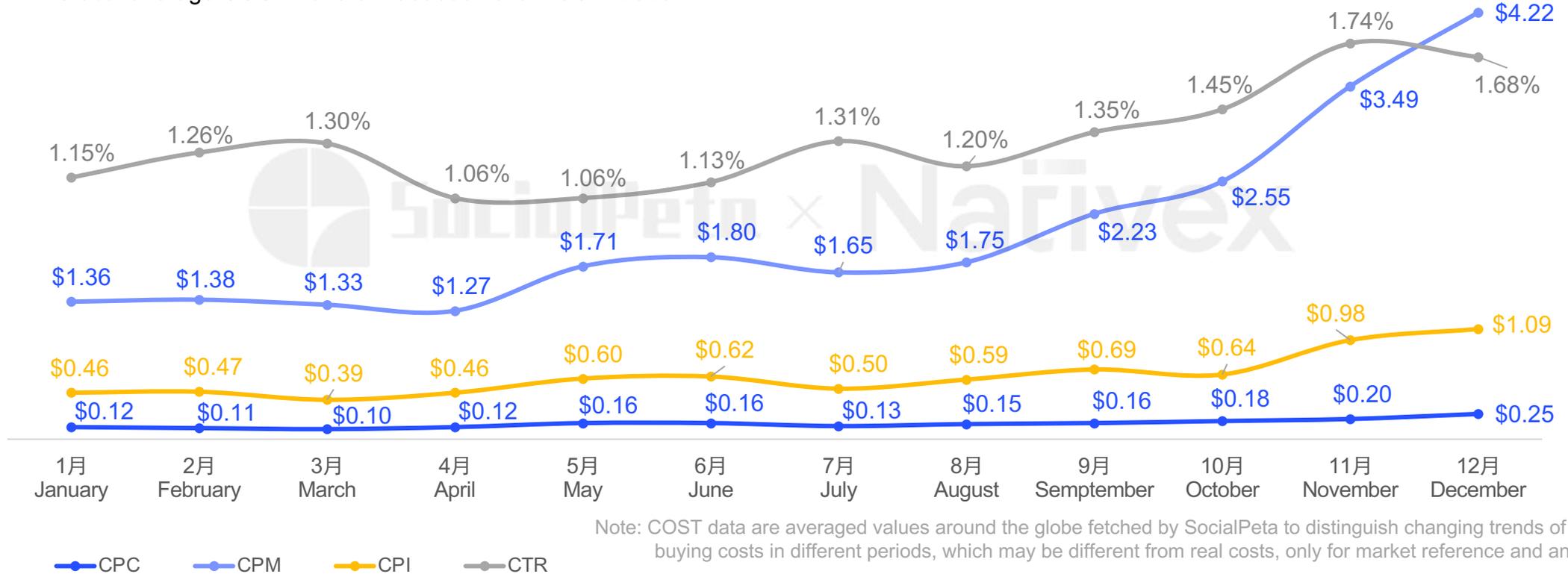
TOP3 popular countries:

1. USA;
2. UK;
3. Canada.



# Global Hot Channels—FB News Feed COST

Global average COST trend of Facebook channels in 2020



CPM, CPC and CPI showed a constant growth trend, reaching peaks all in December, which were \$4.22, \$0.25 and \$21.09.

On the whole, CTR was rising with fluctuations, reaching a peak by 1.74% in November.

# Global Hot Channels—Google Ads (Admob)

Shopping creative of this channel still ranked top with a proportion of 33%, followed by lifestyle and finance creative.

TOP3 countries through this channel were Indonesia, the USA and Canada.

The top advertiser Shopee is a Southeast Asian cross-border ecommerce platform established in 2015.

## TOP3 Hot Advertisers

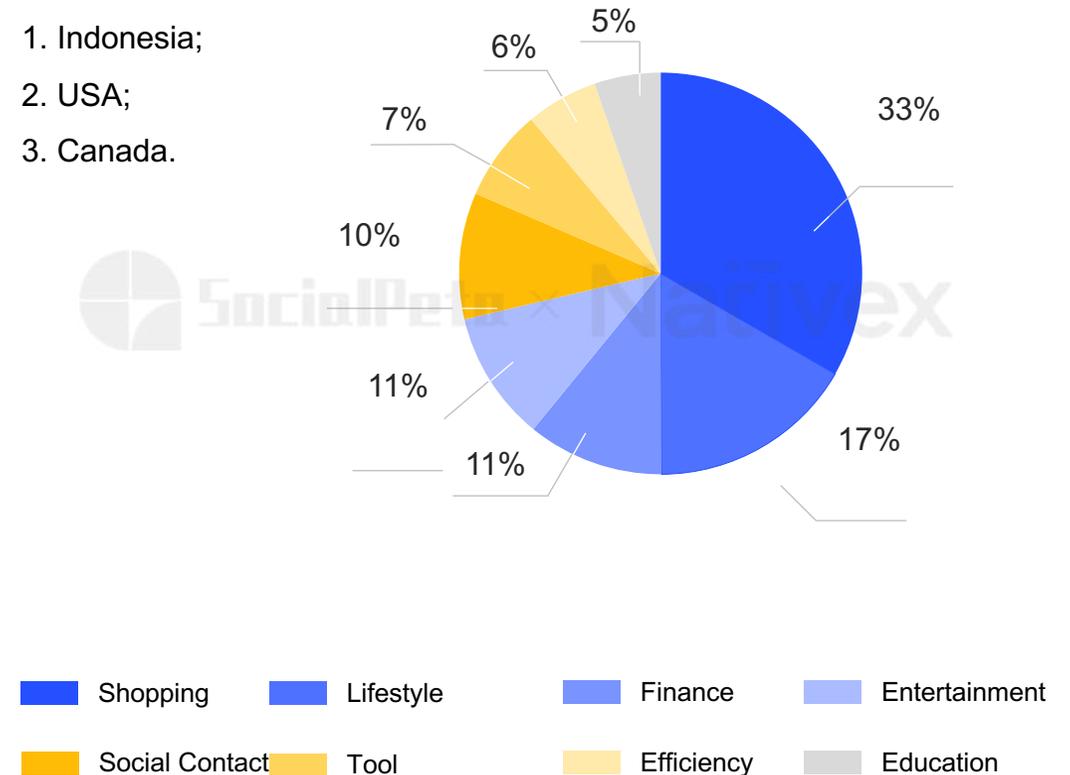
## Developers

## App Types

|   |           |                           |               |
|---|-----------|---------------------------|---------------|
|    | Shopee    | Shopee                    | Shopping      |
|   | BIGO LIVE | BIGO TECHNOLOGY PTE. LTD. | Live Stream   |
|  | Allo      | Monisnap                  | Communication |

## TOP3 popular countries:

1. Indonesia;
2. USA;
3. Canada.



# Global Hot Channels—YouTube

As the largest video platform overseas, YouTube has audiences in many countries and regions around the globe. Many tool apps will also first choose this channel for overseas promotion.

On the whole, shopping creative still ranked top with a proportion of 30%, followed by lifestyle and entertainment apps.

## TOP3 Hot Advertisers

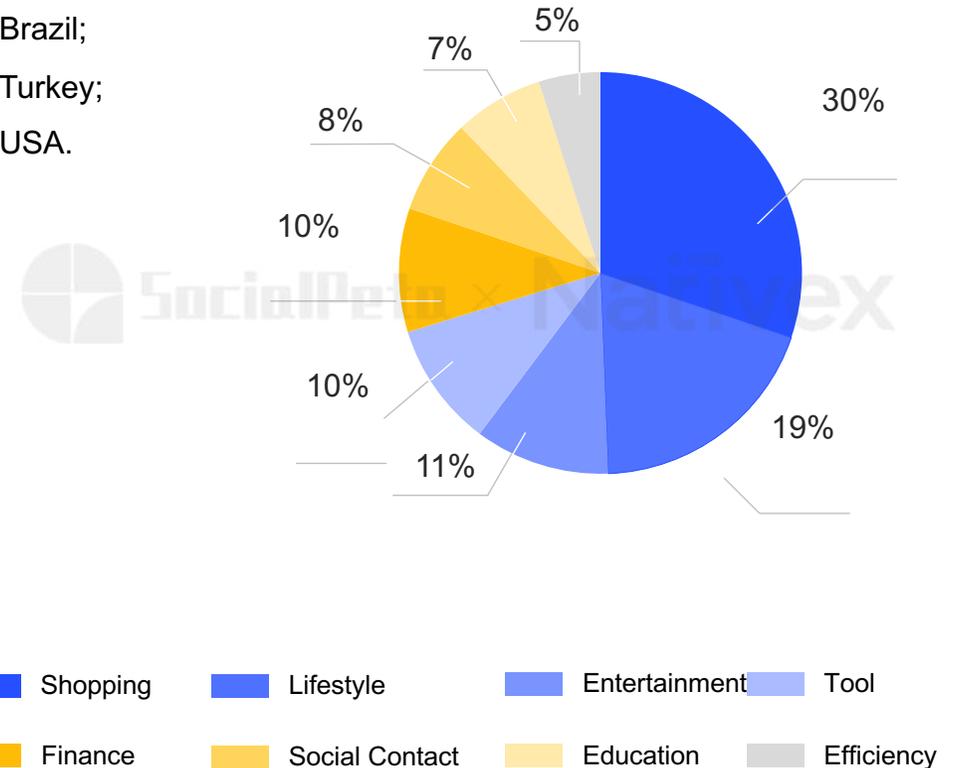
## Developers

## App Types

|   |           |                              |                        |
|---|-----------|------------------------------|------------------------|
|    | SHEIN     | ZOETOP BUSINESS CO., LIMITED | Shopping               |
|   | Domestika | Domestika Incorporated       | Education and Learning |
|  | TikTok    | TikTok Pte. Ltd.             | Video                  |

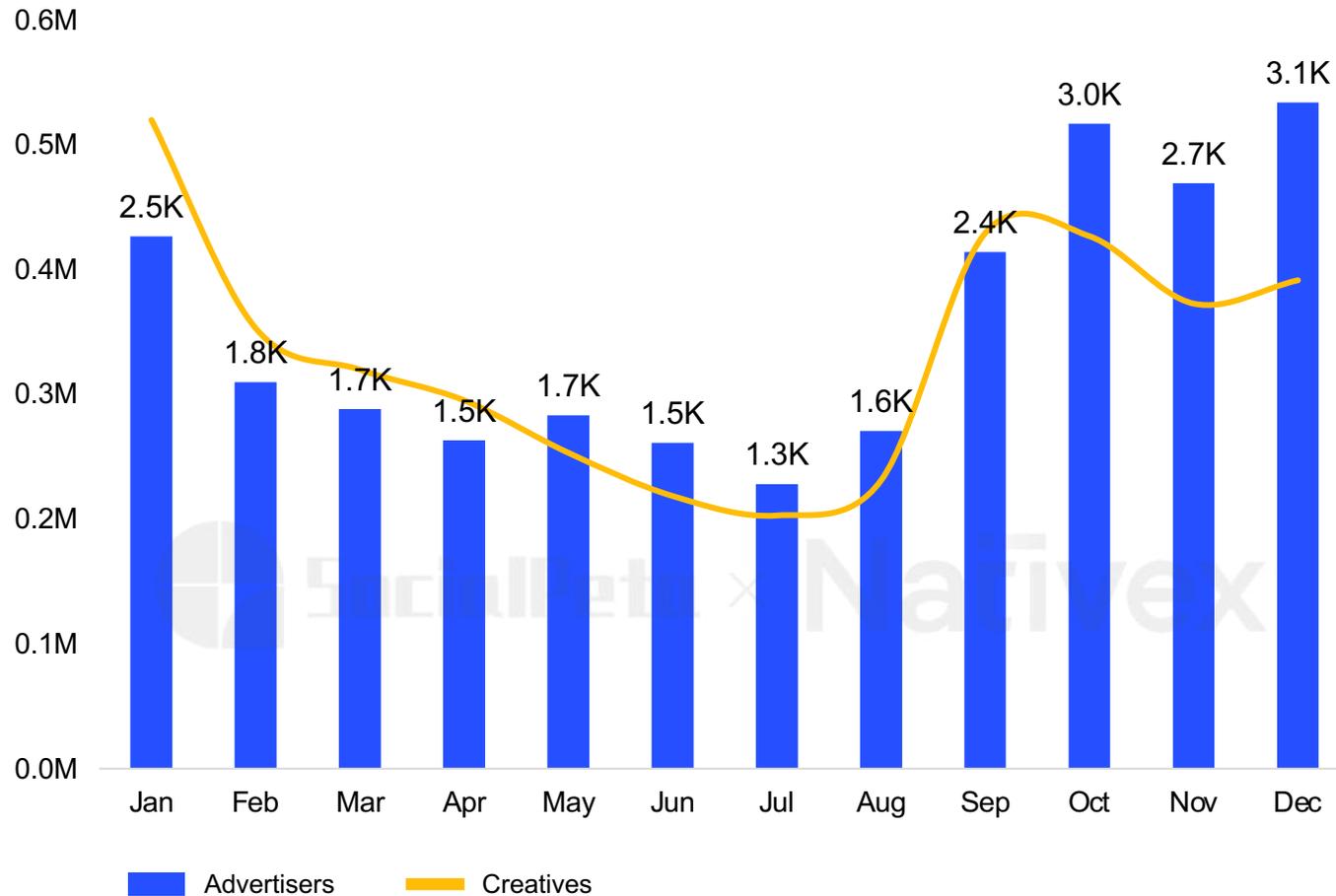
## TOP3 popular countries:

1. Brazil;
2. Turkey;
3. USA.



# 03 Global Popular Countries/Regions

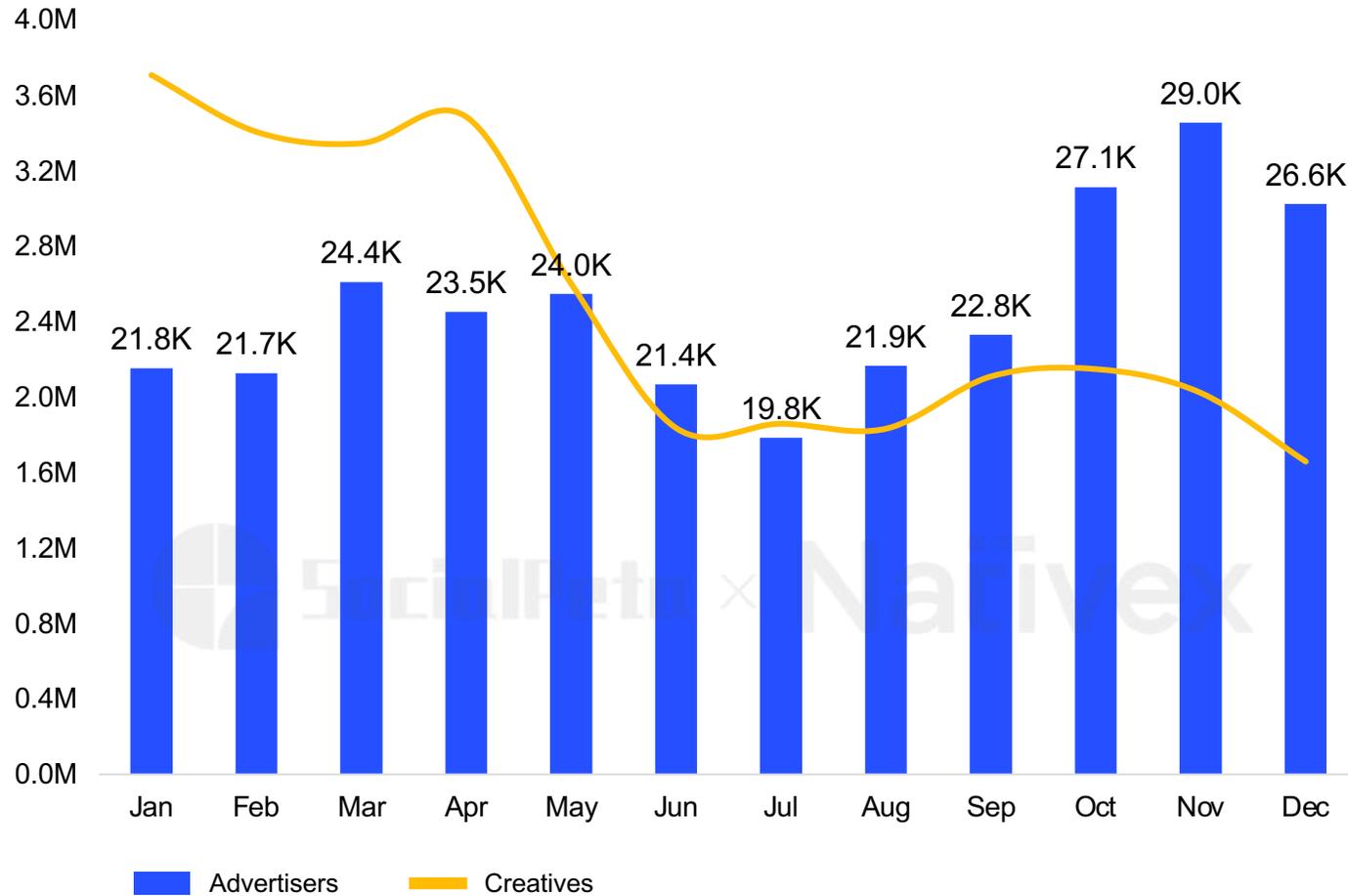
# Popular Countries/Regions—Mainland China



Media buying of the app market in China showed that the influence of the pandemic was still obvious, with only about 1,600 advertisers monthly from February to August. As the pandemic was well under control and businesses returned to normal operation in China, the monthly number of active advertisers after September returned to the level in January before the pandemic, and the number of advertisers even exceeded 3,000 in December.

The amount of creative placed also began to decrease obviously in China in February, but rose significantly in September, reaching about 400,000 pieces of creative placed monthly on average in Q4.

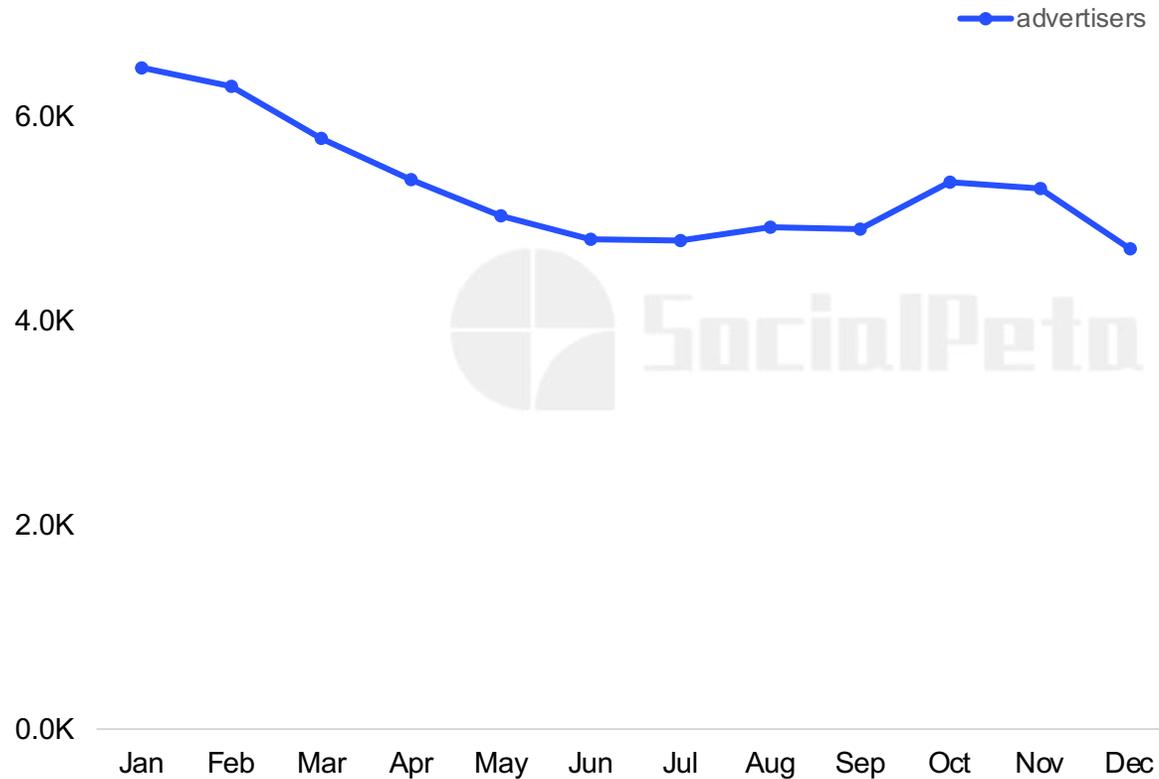
# Popular Countries/Regions—USA



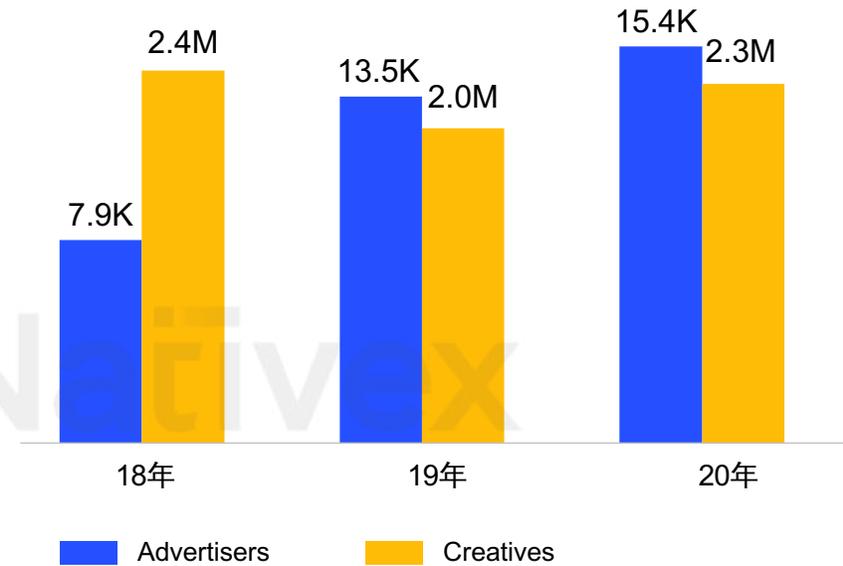
The number of active non-game advertisers in the USA reached a peak of nearly 30,000 cumulatively in November. On the whole, the number of advertisers showed a modest growth trend in Q1 and September.

The amount of creative peaked in January and April respectively, and declined most obviously in June. It did not reverse until Q4.

# Popular Countries/Regions—Japan and South Korea



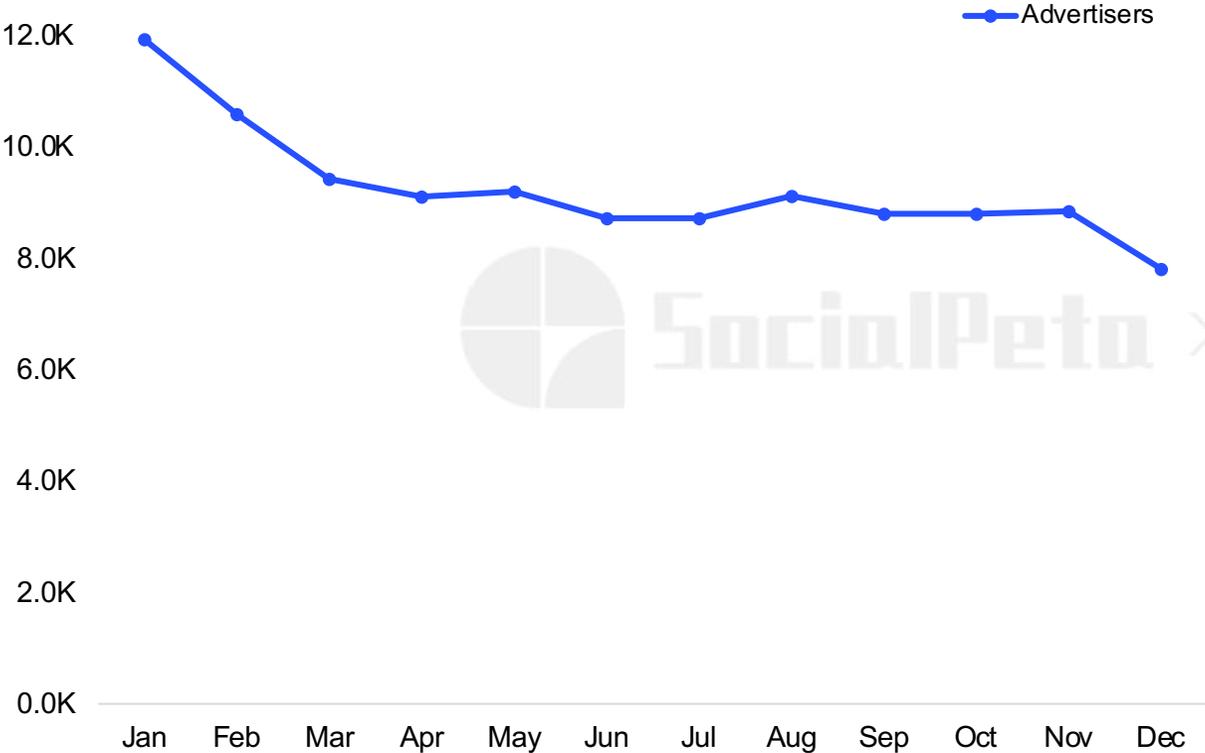
Countries observed: Japan and South Korea.



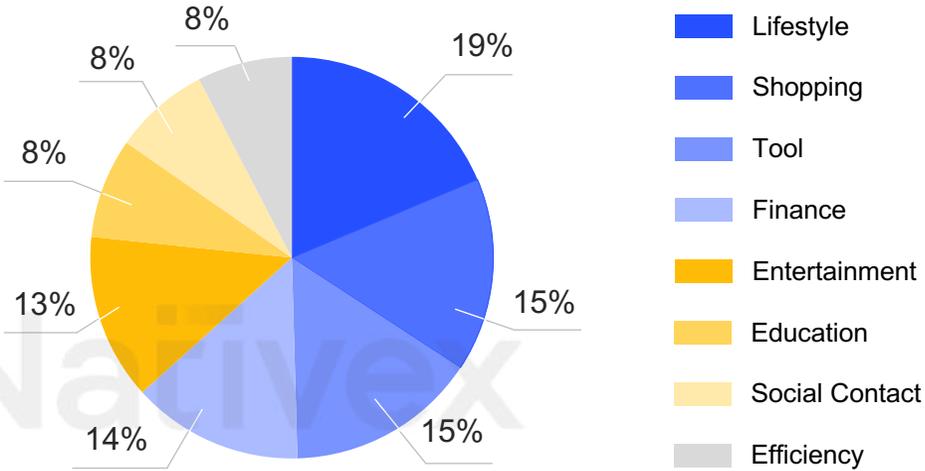
The number of advertisers in Japan and South Korea kept declining in 2020 until it rose again modestly in Q4, with over 5,000 advertisers monthly.

Compared with 2019, the number of advertisers increased by 14.41% year-on-year and the amount of creative rose by 14.03% year-on-year in 2020.

# Popular Countries/Regions—Southeast Asia



Countries observed: Thailand, Indonesia, Singapore, Malaysia, Vietnam and the Philippines



The rapidly developing mobile market of Southeast Asia attracted more and more app manufacturers, of which lifestyle, shopping and tool app advertisers ranked top 3, with a total proportion of nearly 50%.

The number of advertisers fell into decline in Q1, and then remained stable, with around 9,000 active advertisers monthly on average.

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NON-GAME

04 High-quality  
App Creative

# Promotion by Novel App

Guan Yunpeng, a young actor aged 27, had never expected that he would suddenly become a hit for his invention of “a disdainful smile” this summer, as a marginal role in show business for 4 years. In the past few months, Guan Yunpeng and his “disdainful smile” has appeared in a blaze of short ads on platforms such as Weibo and bilibili. This also brought media buying of novel apps into our sight.

Actually, before “god of war in disdainful smile” went viral, similar online novel ads had reached a certain scale, with a broad range of topics, diversified contents and many schools. These ads are mainly aimed to attract users seldom reading online novels to their platforms, so need enough stunts and attraction of creative.

The earliest online novel ads were often a patchwork of pictures matched with thought-provoking text to attract attention. Last year, short video ads grew rapidly to become a mainstream form of advertising for many reading apps. If plots in novels can be made live-action short videos, they cannot only intuitively show cool points in novels, but also better cater to the interest of viewers with plots and interesting features.



Cool plots



Red packet exchange



Product launch

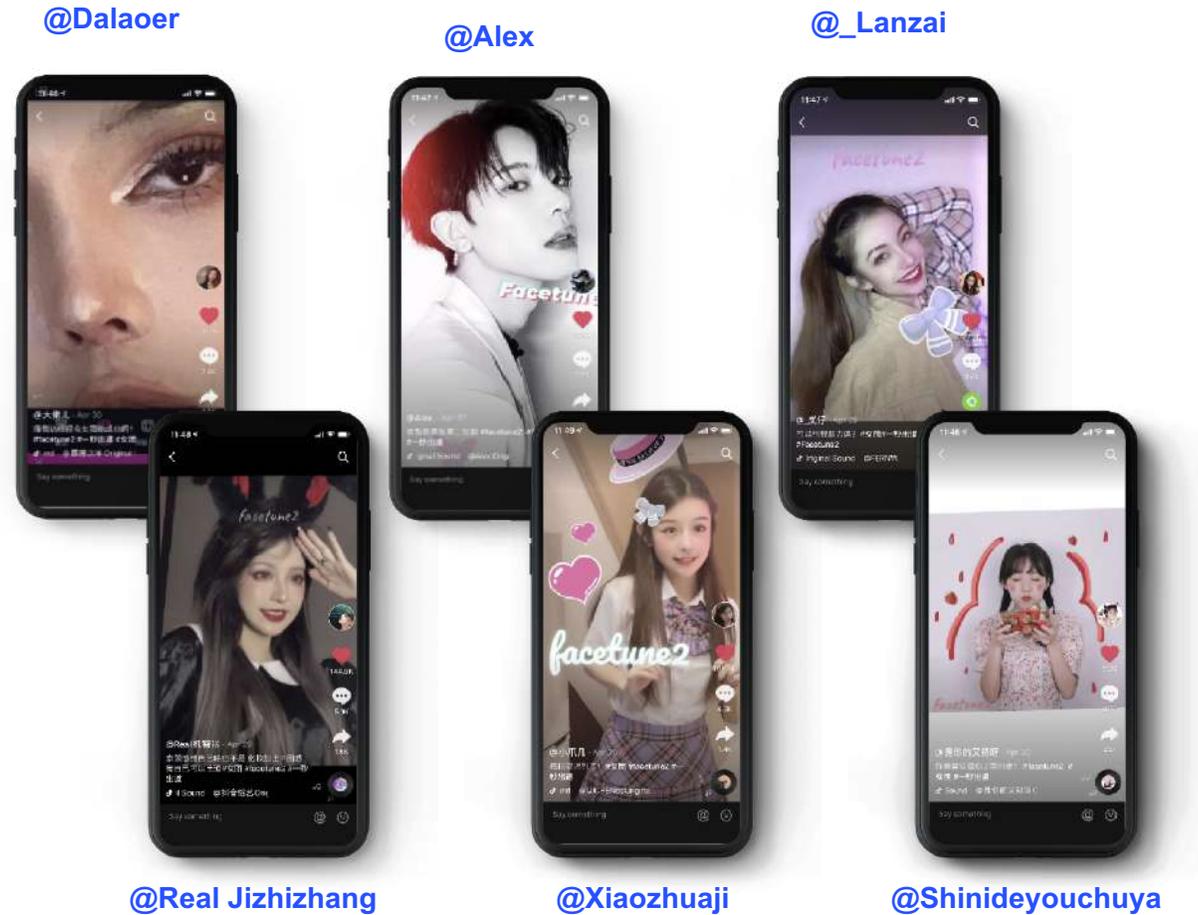
# Promotion by KOLs on Tool Apps

Overseas utility apps always face great difficulties in entering China, for example, their user awareness and retention are low. The influence of KOLs can perfectly fit the pain points above, and help utility apps to gain trust from fans and boost retention.

Through promotion by KOLs, Nativex helped the beauty app Facetune2, created by Lightricks. Lightricks, an Israeli company, to open up the Chinese market. Based on current popular tv shows and hot topics, we delivered creative and contents and created the advertising strategy of KOL promotion and feeds. With the influence of KOLs, we helped build relationship with users and occupy their minds, to achieve the goal of combining long-term brand building and actual conversion.

The whole promotion made the brand become well-know and achieved substantial growth of massive converted users:

1. Page views of video ads exceeded **12 million**, and original videos won nearly **600,000+** likes, **20,000+** comments and **5,000+** sharing
2. CPI decreased by 30%, and conversion was 3 times higher.



# Media Buying of Overseas UGC Short Video Apps

It is difficult for content-based products to go overseas, as Chinese Internet companies have no knowledge of the cultural environment in foreign countries and face challenges in learning about the content consumption habits of local users and getting familiar with local culture etc. Whether tool products to transform into content-based platforms or content-based products such as online novels and short videos to go overseas have to think about how to find a way of localization suitable for themselves.

In media buying accordingly, it will help gain a large number of high-quality local users to figure out local features and better localize creative.

## According to features of creative in hot regions overseas fetched by SocialPeta in 2020:

- In some Latin American countries, the creative of classic songs has always been extremely hot;
- In Southeast Asia, the creative of funny everyday life performs well in interaction;
- In Middle East, the creative of videos, images on how to edit placed by advertisers will bring pretty good data outcomes of interaction.



**Southeast Asia**  
Sharing of funny everyday life



**Latin America**  
Classic song creative



**Middle East**  
Technology sharing video

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**NON-GAME**

# Side Story

Opinion Forecast

# Cultivation of User Habits Will Be Key to Operation

Whether everyone is vaccinated against COVID-19, it is an indisputable fact that our life can never go back. Facing “SARS”, Taobao achieved success. In haze, 3M masks found their places. The key to the success of mobile apps is also user habits.

In 2020, telecommuting, online education, online diagnosis, and live stream shopping made all of us feel unprepared, but then we gradually adapted to them and even began to like and made them our habits. In turn, such “passive acceleration” of apps and “passive cultivation” of user habits catalyzed advantages and trend of studying, working and getting life services on the mobile Internet, bringing great prospects to the online economy.

“Lockdown” dramatically reduced offline entertainment activities. Besides, with the development of 5G and VR technologies and better performance of mobile devices, video, entertainment and consumption apps will keep rising around the globe. Some really dramatic innovations such as cloud travel, dancing and music festivals forecast the future connection of online and offline scenarios, though criticized widely. “Interactive life” will come ahead of time.

In 2020, TikTok really caught the attention of the world, and will maintain rapid growth within a certain period as shown by its trend of growth. Its distinctive UGC and rich convenient video editing tools also boost the market of short videos nationwide, and its highly interactive contents also determine the key to “localized operation” of short video apps overseas.

As the order of the world economy was disrupted, the situation of “lockdown offline and accelerated integration online” will continue. Cross-border tourism and overseas study apps will grow at a slower pace, while cross-border ecommerce will boom more rapidly. Therefore, this will result in weakening of cross-border travel apps and the centralized development of international logistics and finance markets.

The slogan “What's past is prologue” commonly seen at the end of every year is extremely appropriate for the mobile app market in 2020. When the “black swan” becomes normal, the one who succeeds in cultivating user habits will have a new start.

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## About SocialPeta

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SocialPeta, an advertising marketing platform launched online in 2016, covers 70+ global channels with products and provides multi-dimensional analysis of over 5 million advertisers and over 1 billion pieces of advertising data, to help customers timely grasp advertising strategies of competitors and trends of the industry market. Customers include famous brands and mobile apps such as Google, NetEase Games, Baidu, VNGGames, and Gismart.

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Nativex is dedicated to driving ROI and growth for all sectors of business in a digital and mobile-first world. Nativex enables marketers to create strong, sustainable growth through universal access to digital channels across China and the rest of the world. In addition to this, Nativex offers all the integrated tools needed for marketers to thrive and create a meaningful impact on their audiences.



# Nativex