

H1 2022
GLOBAL
MOBILE
GAME

WHITE PAPER ON
ADVERTISING & MARKETING

Preface

What happened in the mobile game industry in the first half of 2022? As an answer to that, SocialPeta published its “H1 2022 Mobile Game Marketing White Paper”, providing global insights for you to enter global markets with your products. According to the global data captured and integrated by SocialPeta, 2022 saw the following trends in the mobile game market:

I. Mobile marketing focused on quality, leading to a drop in total ads. But T2 and T3 markets experienced a significant increase:

H1 2022 saw a decline of 2% YoY in the number of advertisers and a decline of 27.83% in total creatives; but there were increases of over 10% YoY in advertisers in Middle East, South America, South Asia, and other emerging markets.

II. Metaverse drove several technical innovations:

The idea of metaverse had been a hot topic ever since it was first introduced. As the metaverse hype started to settle down, the market attitude became more rational. The effort to realize the real metaverse also brought the innovation of the related technologies. Tencent bought Black Shark Corporation this year, and transitioned its entire business from game phones to VR headsets, utilizing it for laying a foundation for metaverse. Recently CMGE also launched Youyu Art, a distribution platform for digital artwork copyright. Overall, metaverse has developed from virtual fantasy to firm reality.

III. As the COVID-19 pandemic continued, social games were going to boom:

The pandemic that broke out in 2019 has changed the lives of people across the globe. The unpredictable variants and lockdowns have deepened the anxiety of people, resulting in their increased demand for online social services. Some social activities that were very popular offline have been brought online, such as murder mystery games and social deduction games. The mobile version of [Among Us!] has been very popular among gamers ever since its release, with over 52 million downloads in the past half year. In the post-pandemic era, a boom of social games with simple gameplays may come again.

IV. With high-budget/high-quality mobile games in general, cross-platform play became the new growth point:

More and more gamers have known the charm of high-quality games through live streams and short videos, resulting in a rising overall expectation for games and a surging demand for high-quality game contents. [Genshin Impact]'s success has proved the profitability of cross-platform games. With the technological innovation of cloud games and third-party game engines, cross-platform games may be the mainstream in the future.

V. The booming E-sports market boosted the global cultural exchange:

According to the data released by Newzoo, the global game live-streaming audience has been growing at an annual growth rate of about 10% since 2020. In addition to China, USA, Europe, South Korea and other mature esports regions, esports has been growing in popularity in Southeast Asia and India. There were 8 large-scale and 10 small-scale esports projects in the Southeast Asian Games hosted in Vietnam in May 2022. With the technological innovation as a result of metaverse, the esports market has become intensely competitive.

The global mobile game market is ever-changing. So game companies need to pay constant attention to both the overall market trends and the marketing trends of top products of industrial segments.

About “SocialPeta”



With SocialPeta, you can spy on your competitors' ad data, and get ad data from networks, media, and advertisers around the world to inspire you.

Get Inspiration

From 1.2 Billion Ad Creatives

SocialPeta covers 72 countries and regions, and over 90 well-known ad channels worldwide, such as Unity, Twitter, YouTube, Facebook and TikTok. We provide nearly 1 billion ad creatives, updating millions each day. SocialPeta is the best source of inspiration for ads.



Declaration



1. Data Sources

With the assistance of the world's biggest advertising intelligence and analysis tool, SocialPeta Data Team has provided you with insights into the mobile advertising data of global games. We collect advertising data by sampling worldwide, covering over 70 channels and nearly 70 countries and regions worldwide, and have captured a total of over 1.2 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.

1. Data Cycle and Indicators

Overall date range of the report: Jan-Jun 2022

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

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1. 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 Regions

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

JP & ROK: Japan, South Korea

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

South Asia: India, Pakistan

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

CIS: Russian Federation, Ukraine

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

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

Oceania: Australia, New Zealand

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

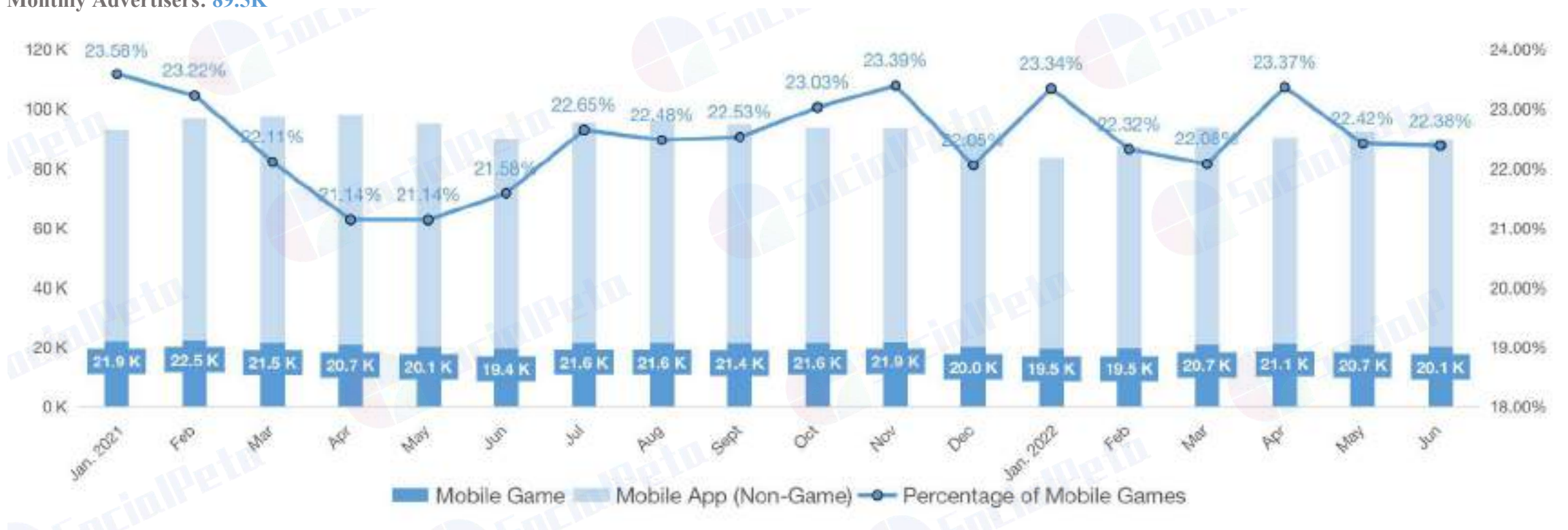
Insights into Global Mobile App Marketing



2022 saw a YoY decline of 5.79% in the number of mobile advertisers

The overall marketing of global mobile apps has been impacted by the continuous COVID-19 pandemic and the increasingly complicated global environment. Especially in January this year, the total number of global mobile app advertisers dropped to an all-time low of 83,400. Mobile game advertisers accounted for about 22.65% in 2022.

2022 Mobile Apps (Game & Non-Game) Monthly Advertisers: 89.5K

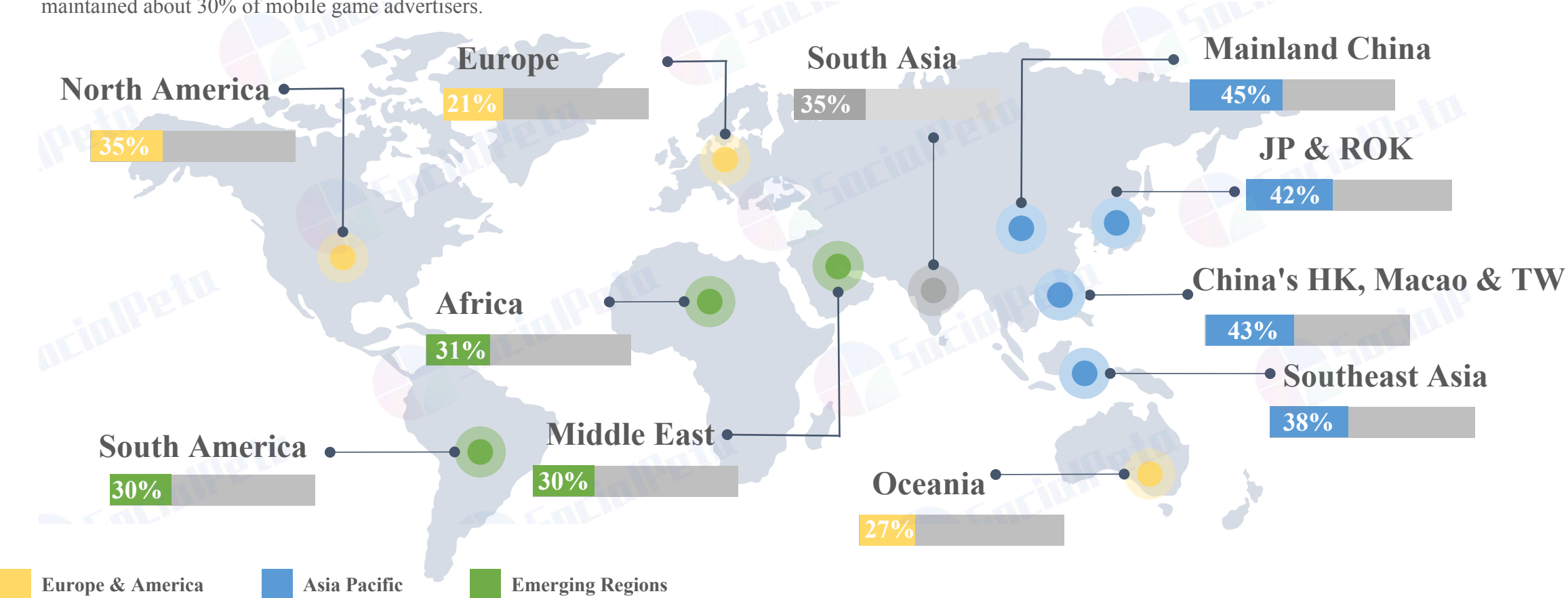


Insights into Mobile App Marketing in Different Regions



Asia Pacific had the highest percentage of mobile game advertisers.

Mainland China had the highest percentage (45%) of mobile game advertisers, Europe had the lowest percentage of mobile game advertisers, and emerging markets maintained about 30% of mobile game advertisers.



The dark-colored part represents the percentage of mobile game advertisers in the region.

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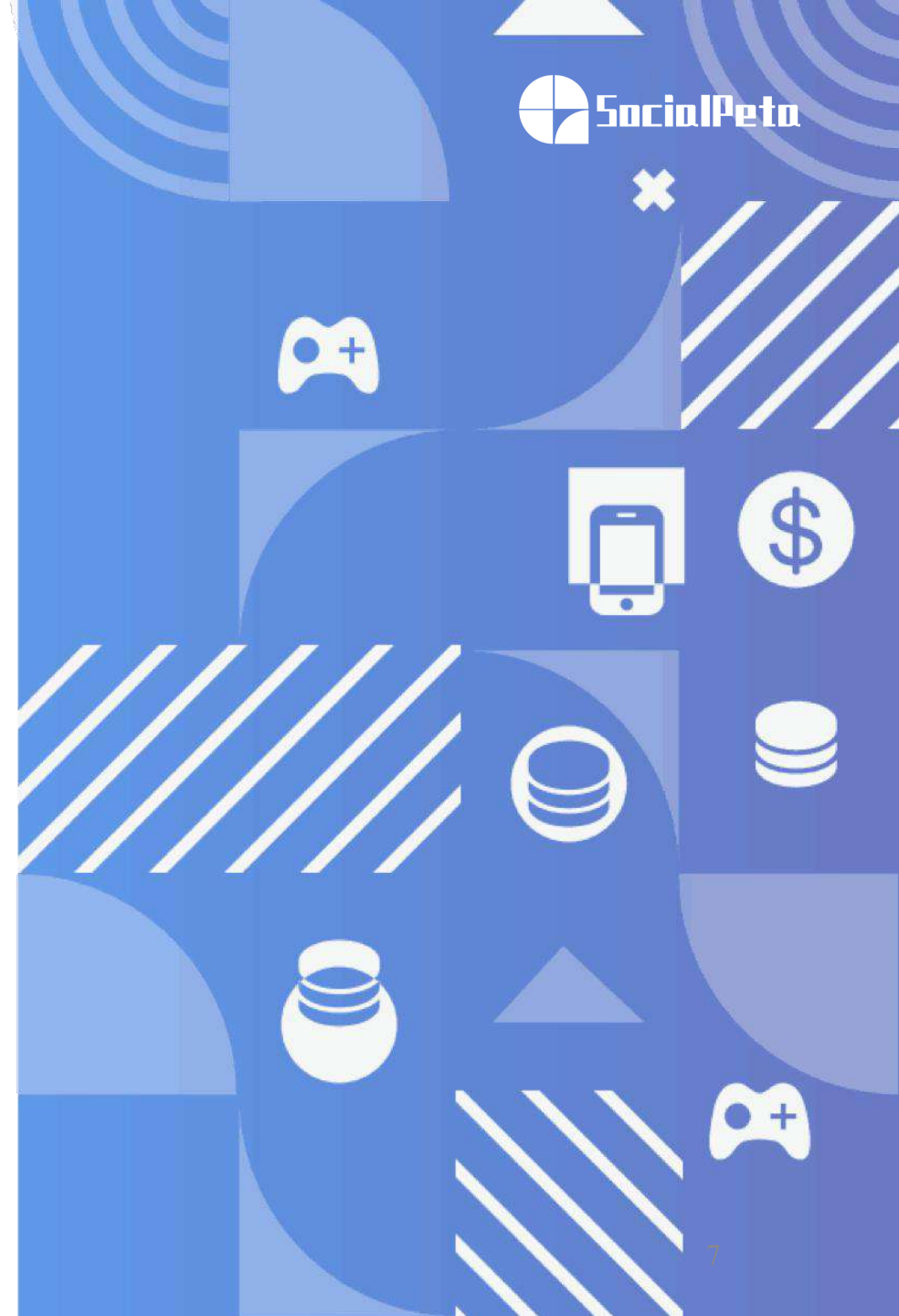
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Insights into Global Mobile Game Marketing

Insights into Global Mobile Game Marketing

H1 2022 saw a **YoY decline of 27.83%** in mobile game creatives

2022 saw a sharp drop in mobile game advertising. There were 45,100 advertisers in H1 2022, not much change compared to the same period last year. But the total mobile game creatives were 15.8 million, representing a YoY decline of nearly 30%.

There were 10.8 million creatives in Q1 2022, down 22.83% YoY; and 9.8 million creatives in Q2, down 38.43% YoY.



Mobile Game Advertisers in H1 2022

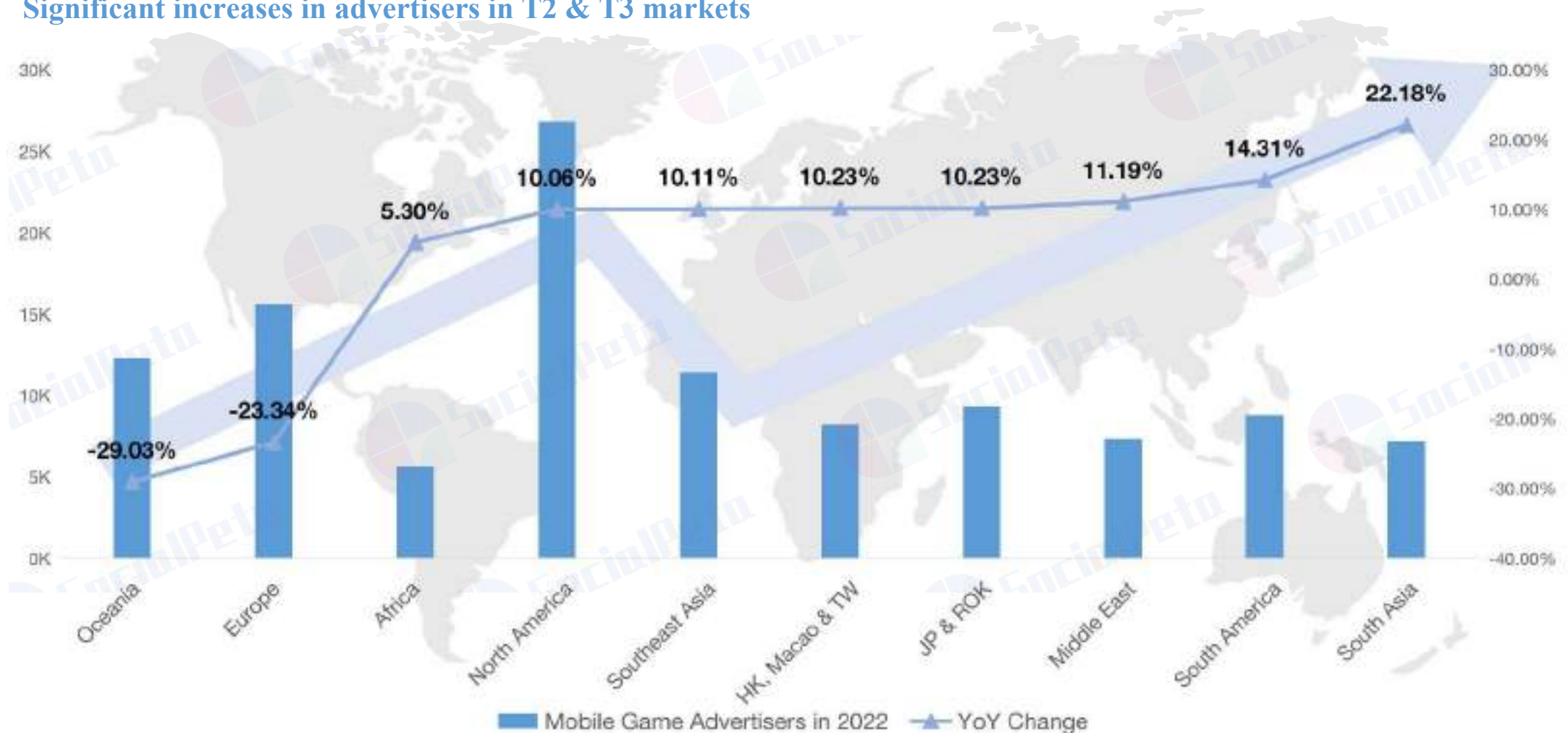
45.1K | YoY↓2%

Mobile Game Creatives in H1 2022

15.8M | YoY↓27.83%

Insights into Global Mobile Game Marketing

Significant increases in advertisers in T2 & T3 markets



Percentage of Advertisers by Game Genre

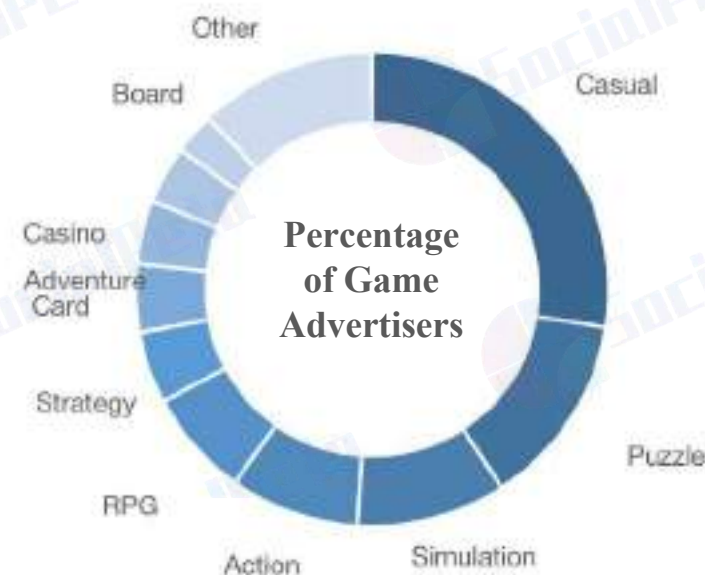
Genre	Percentage of All Genres	YoY Change
Casual	26.03%	+4.70%
Puzzle	12.47%	+0.82%
Simulation	9.64%	+1.19%
Action	8.31%	-0.14%
RPG	6.91%	-2.51%
Strategy	4.63%	-0.57%
Card	4.39%	+0.12%
Casino	4.11%	+0.78%
Adventure	3.73%	-0.42%
Board	2.66%	-0.07%

Top 3 Game Genres by Number of Advertisers

Casual, Puzzle, Simulation

There was a significantly increased percentage of casual game advertisers, accounting for 26.03% of the total advertisers, up 4.7% YoY.

There was a dramatically reduced percentage of RPG advertisers. RPGs had been the third games during the same period last year by the number of advertisers, and were ranked below simulation and action games this year.



Percentage of Creatives by Game Genre

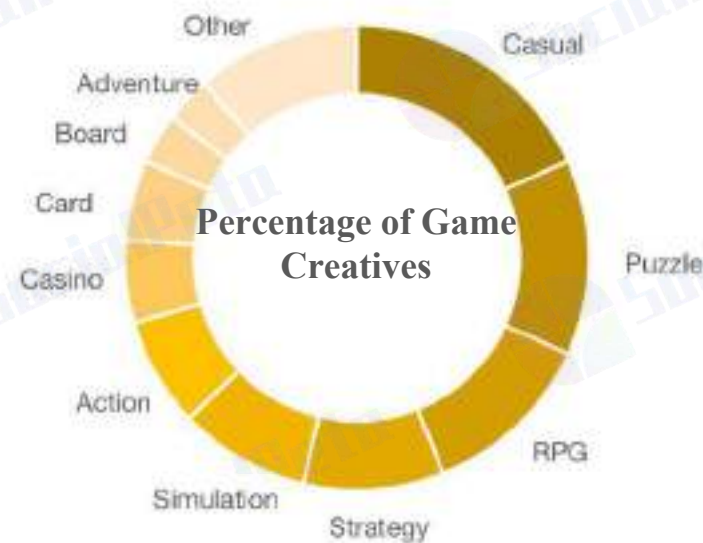
Genre	Percentage of All Genres	YoY Change
Casual	18.14%	+1.07%
Puzzle	13.67%	+0.74%
RPG	12.14%	-1.50%
Strategy	9.78%	+0.21%
Simulation	9.12%	-0.52%
Action	7.61%	+0.13%
Casino	5.76%	-0.40%
Card	5.62%	+0.13%
Board	3.49%	+0.19%
Adventure	3.20%	-0.30%

Top 3 Game Genres by Number of Creatives

Casual, Puzzle, RPG

Because of the huge number of casual game advertisers, casual game creatives accounted for the highest percentage of 18.14%, up 1.07% YoY. Puzzle game creatives accounted for the second-highest percentage, up 0.74% YoY.

RPG game creatives accounted for 12.14%, representing the sharpest drop of 1.5% YoY, falling 1 spot in the rankings.

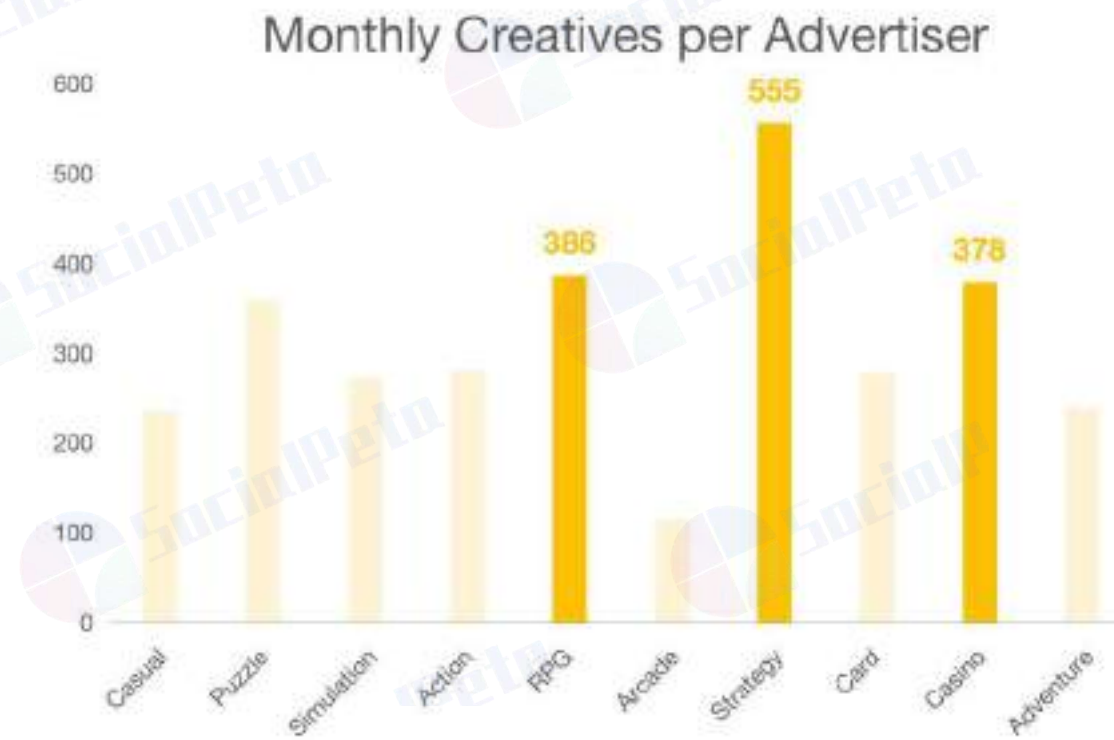


Insights into Game Marketing by Game Genre

In 2022, mobile game **advertisers per month: 20.4K**; **monthly creatives per advertiser: 308**

Among all mobile games, **casual games** had the most monthly advertisers. According to SocialPeta, there were over 6300 casual game advertisers per month, followed by puzzle game and simulation game advertisers.

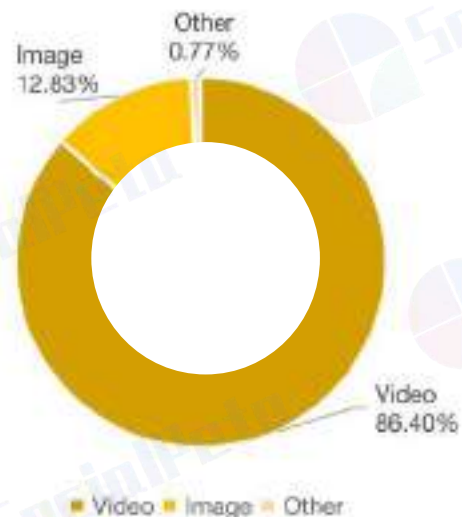
Strategy games had 555 monthly creatives, the most among all games' monthly creatives, mainly contributed by SLG games, one type of strategy games.



Percentage of Creatives by Game Genre

H1 2022 Percentage of creatives by game genre

Video creatives accounted for the highest percentage:
Over 86%



13,588K

Total video creatives

Video has always been the main format of mobile game creatives. With the upgrading of global mobile devices and mobile networks, advertisers would choose video creatives as their major advertising format because videos can convey much more information.

Changing trends of video and image creatives over the years

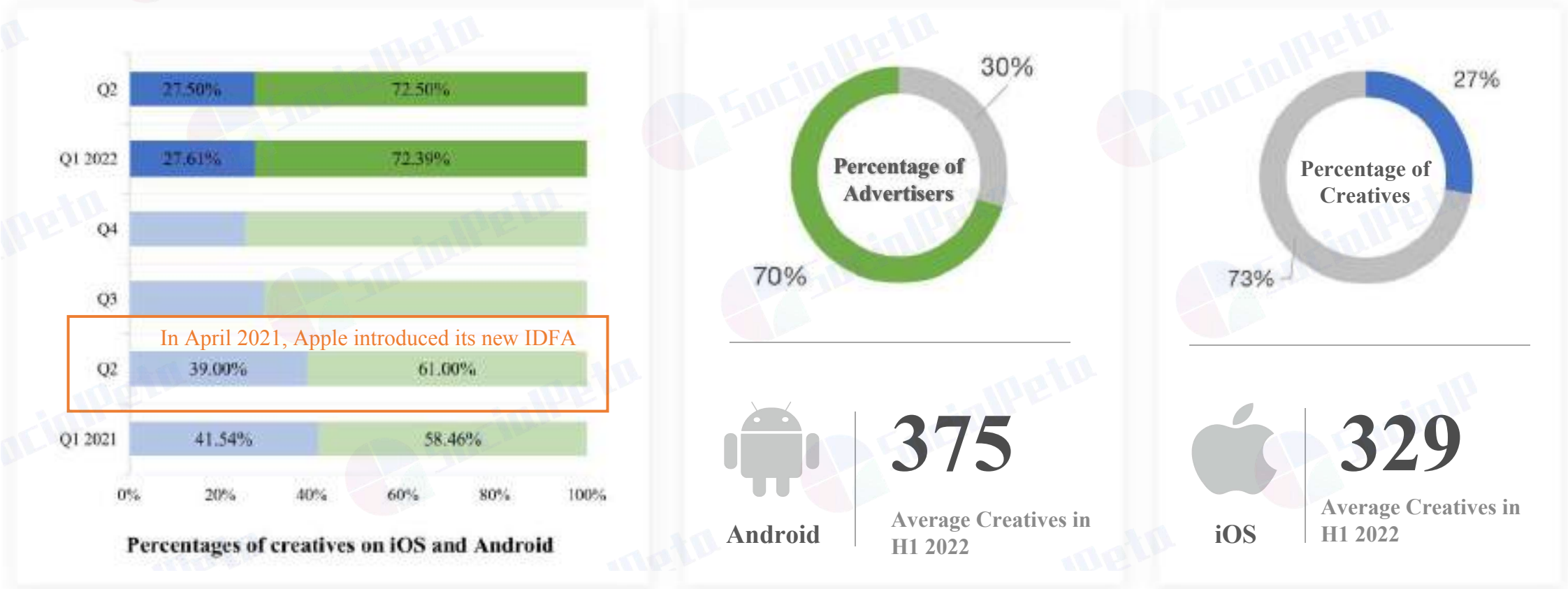
- The percentage of video creatives continued to rise
- The percentage of image creatives dropped from 18% to about 12%



Mobile Games Advertising Insights on iOS & Android

Android had about 70% mobile game advertisers and creatives

Apple's new IDFA forced more and more companies to focus their advertising on Android, as a result of which, average creatives per advertiser on Android were 14% more than that on iOS.



Top Mobile Games on the App Store in H1 2022

Download Chart

1		Subway Surfers Sybo Games	Action
2		Roblox Roblox	Adventure
3		Coloring Match Supersonic	Casual
4		Wordle! Lion Studios	Word
5		Fishdom Playrix	Puzzle
6		Count Masters AIBY	Casual
7		8 Ball Pool™ Miniclip	Sports
8		Fill The Fridge! Rollic Games	Casual
9		Magic Tiles 3 Amanotes	Music
10		Among Us! InnerSloth	Action
11		Candy Crush Saga King	Puzzle
12		Clash Royale Supercell	Strategy
13		Stumble Guys Kitka Games	Action
14		Bridge Race Supersonic	Casual
15		Going Balls Supersonic	Casual
16		Call of Duty®: Mobile Tencent & Activision Blizzard	Action
17		PUBG MOBILE Level Infinite	Action
18		Homescapes Playrix	Puzzle
19		Project Makeover Magic Tavern	Puzzle
20		Garena Free Fire GARENA	Action

Revenue Chart

1		Roblox Roblox	Adventure
2		Candy Crush Saga King	Puzzle
3		Genshin Impact miHoYo	Adventure
4		Pokémon GO Niantic	RPG
5		Coin Master Moon Active	Casual
6		XFLAG	RPG
7		Clash of Clans Supercell	Strategy
8		Fate/Grand Order Cygames	Simulation
9		Homescapes Playrix	Puzzle
10		PUBG MOBILE Level Infinite	Action
11		Clash Royale Supercell	Strategy
12		Royal Match Dream Games	Puzzle
13		KONAMI	Sports
14		GungHo	RPG
15		Call of Duty®: Mobile Tencent & Activision Blizzard	Action
16		Gardenscapes Playrix	Puzzle
17		Garena Free Fire GARENA	Action
18		Fate/Grand Order Aniplex	RPG
19		Evony Top Games	Strategy
20		State of Survival FunPlus	Strategy

Top Mobile Games by Advertising in H1 2022



1	Fishdom Playrix	11	Mafia City Yotta Games	21	Bingo Clash AviaGames	31	Slots GoldenHoYeah IGS	41	Find the Difference Lemel Labs
2	The Ants StarUnion	12	Resortopia DH Games	22	永夜星神 SpringGame	32	Dynasty Legends 2 Taihe Interactive	42	Apex Legends Mobile Electronic Arts
3	Coloring Book! Doodle Mobile	13	Two Dots Playdots	23	Kingdom Guard Tap4Fun	33	Evony Top Games	43	盛世芳華 Huoyu Game
4	State of Survival FunPlus	14	Purrfect Tale DH Games	24	Township Playrix	34	Mega Tower Youloft Tech	44	Rise of Empires IM30
5	歡樂大東家 EWORLD	15	Homescapes Playrix	25	The Soul Guardian YANG STUDIO	35	吞食天地3:放置版 9Splay	45	奇蹟MU Ourpalm
6	聖樹喚歌 新连信息	16	Wordle! Lion Studios	26	Family Farm Adventure Century Games	36	Pocket7Games AviaGames	46	聖鑰 SpringGame
7	The Grand Mafia Yotta Games	17	Word Trip PlaySimple Games	27	Rabbit Empire Yojoy Game	37	Legend of the Phoenix Modo Global	47	Idle Heroes DH Games
8	Evertale ZigZaGame	18	AZUREA-空 唄- Zlongame	28	Jackpot World™ Bole Games	38	Garena Free Fire GARENA	48	一念逍遙 Leiting Games
9	Block Puzzle Doodle Mobile	19	蟻族奇兵AntWars Eskyfun	29	Last Fortress IM30	39	爱琳诗篇 9377	49	War Robots Pixonic
10	Rise of Kingdoms Lilith Games	20	Animal Restaurant DH Games	30	Trivia Blitz Joyride Games	40	DK Mobile Mover Games	50	Hero Wars Nexters

Top Mobile Games on Google Play in H1 2022

Download Chart

1	Subway Surfers Sybo Games	Action	11	My Talking Tom Friends Outfit7	Simulation
2	Ludo King Gametion	Board	12	8 Ball Pool™ Miniclip	Sports
3	Garena Free Fire GARENA	Action	13	Carrom Pool Miniclip	Board
4	Candy Crush Saga King	Puzzle	14	Truck Simulator Games Wing	Simulation
5	Merge Master HOMA GAMES	Casual	15	Stumble Guys Kitka Games	Action
6	Race Master 3D SayGames	Casual	16	Traffic Rider Soner Kara	Racing
7	Garena Free Fire GARENA	Action	17	Find the Alien Moonee	Casual
8	Roblox Roblox	Adventure	18	DOP 4 SayGames	Casual
9	My Talking Tom 2 Outfit7	Simulation	19	Bridge Race Supersonic	Casual
10	Piano Fire Adaric Music	Music	20	Fishdom Playrix	Puzzle

Revenue Chart

1	Lineage W NCSOFT	RPG	11	Gardenscapes Playrix	Puzzle
2	Coin Master Moon Active	Casual	12	Evony Top Games	Strategy
3	Genshin Impact Cygames	Simulation	13	Clash of Clans Supercell	Strategy
4	Candy Crush Saga King	Puzzle	14	State of Survival FunPlus	Strategy
5	Roblox Roblox	Sandbox	15	Homescapes Playrix	Puzzle
6	Genshin Impact miHoYo	Adventure	16	Pokémon GO Niantic	RPG
7	Fishdom XFLAG	RPG	17	Fate/Grand Order Aniplex	RPG
8	Garena Free Fire GARENA	Action	18	Lords Mobile IGG	Strategy
9	Lineage M NCSOFT	RPG	19	PUBG MOBILE Level Infinite	Action
10	PUBG MOBILE Level Infinite	Action	20	Dungeon Masters Kakao Games	RPG

Top Mobile Games by Advertising in H1 2022



Android



1	Jackpot World™ Bole Games	11	Cash Frenzy™ Bole Games	21	Text or Die Rollic Games	31	Wood Block Puzzle Learnings	41	花舞宫廷 Origin Mood
2	The Grand Mafia Yotta Games	12	Car Fix Tycoon SONOW	22	聖鑰 SpringGame	32	Township Playrix	42	Solitaire Learnings
3	Mafia City Yotta Games	13	Fishdom Playrix	23	Sudoku Learnings	33	Words of Wonders Fugo Games	43	Paintist Plus 道成网络
4	Lords Mobile IGG	14	The Ants StarUnion	24	War Robots Pixonic	34	Money Rush Rollic Games	44	Coloring Book! Doodle Mobile
5	Coin Pet ASIA YUTAI NETWORK	15	Tap Color Pro Century Games	25	Fill The Fridge Rollic Games	35	Solitaire Home Design Beta Games	45	Coffee Stack Rollic Games
6	Kingdom Guard Tap4Fun	16	Garena Free Fire GARENA	26	Homescapes Playrix	36	Gardenscapes Playrix	46	Family Farm Adventure Century Games
7	Lotsa Slots Bole Games	17	Camping Tycoon SONOW	27	Chapters Crazy Maple Studio	37	State of Survival FunPlus	47	Hair Challenge Rollic Games
8	Rise of Kingdoms Lilith Games	18	Puzzles & Survival 37Games	28	Coin Master Moon Active	38	Braindom Matchingam Games	48	Genshin Impact miHoYo
9	Evony Top Games	19	Last Shelter IM30	29	Last Fortress IM30	39	Yalla Ludo Yalla	49	Two Dots Playdots
10	Rise of Empires IM30	20	Jackpot Master™ Zeroo Gravity	30	Braindom 2 Matchingam Games	40	Office Fever Rollic Games	50	Mega Tower Youloft Tech



Insights into Mobile Game Marketing in Top Countries/Regions

Top 10 Mobile Games in Mainland China



Analysis of Mobile Game Advertisers in China's Mainland



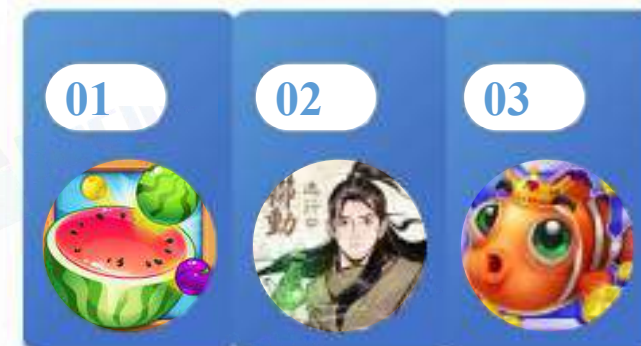
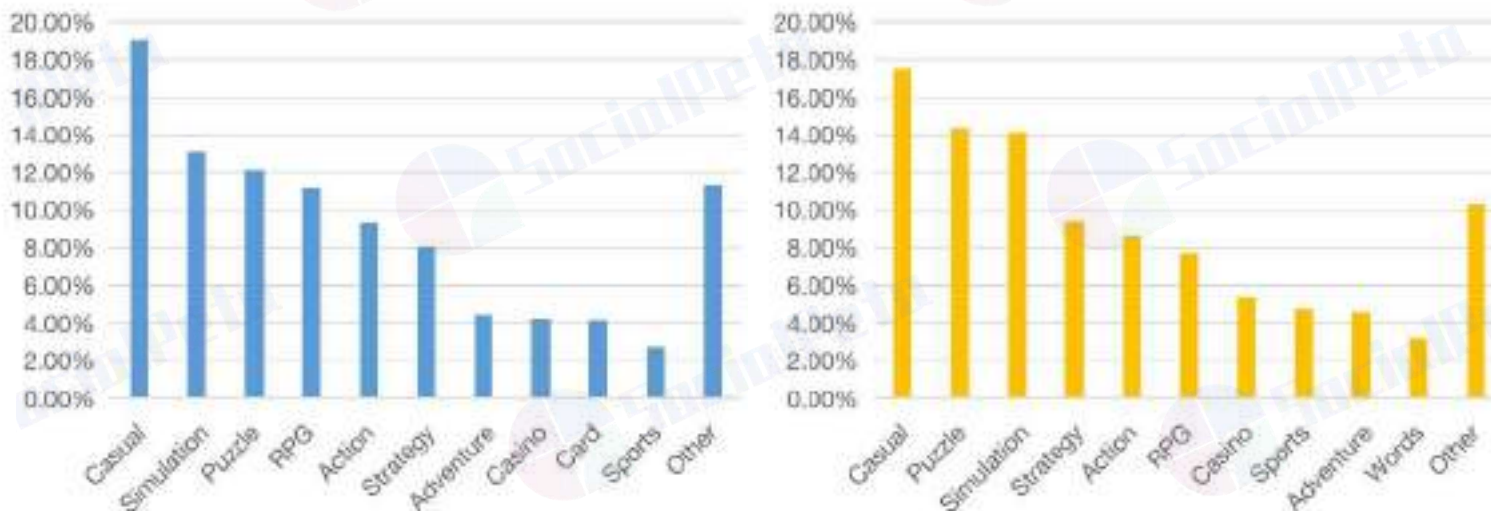
Percentages of advertising by game genre

Simulation game advertisers accounted for as high as 13.14%; puzzle game creatives accounted for 14.39%.

From its downloads and revenue, we can see that the business simulation game [可口的披萨，美味的披萨] has gained quite a popularity through the social media Tiktok.

Because of the unique version numbering system in China's mainland, as of June 2022, less than 200 games had achieved version numbers this year. The scarce version numbers and the long period of examination forced Chinese game companies to launch their products globally.

■ Active Advertisers ■ Active Creatives



水果对对碰 一念逍遥 捕鱼大作战

Number of advertisers in each month

Total advertisers in H1: 6.1K; Monthly advertisers: 3.9K.



Top 10 Mobile Games in China's HK, Macao & TW

Download

1		Apex 英雄M 5X Games	Shooter
2		聖鎗 SpringGame	MMO
3		我當校長超勇的 Pleasing Creation Times	Simulation
4		Sausage Man XD Inc.	Shooter
5		斗羅大陸:武魂覺醒 龙悦网络	RPG
6		T3 Arena XD Inc.	Shooter
7		傀儡師: Tower Defense對決 TOUDA	Strategy
8		Last Fortress IM30	SLG
9		Date A Live Moonwalk Interactive	RPG
10		幻想名將傳 Doki Studio	Idle

Revenue

1		秘境傳說: 神木遺跡 4399	SLG
2		聖鎗 SpringGame	MMO
3		Garena 傳說對決: GARENA	MOBA
4		Genshin Impact miHoYo	Adventure
5		Lineage W NCSOFT	MMO
6		星城Online WANIN	Slots
7		新劍俠世界3 Mover Games	MMO
8		神魔之塔 Mad Head	RPG
9		Pokémon GO Niantic	Action
10		少女迴戰 ONEMT	Idle

Download

1		RO仙境傳說: 魔物遠征 Gravity	Idle
2		我帶兵最牛 EkiPlay	SLG
3		少女迴戰 ONEMT	Idle
4		Sausage Man XD Inc.	Shooter
5		Fish Eater.io Tap 2 Fun	Hyper-Casual
6		秘境傳說: 神木遺跡 4399	SLG
7		富甲江戶城 YOGAME	Simulation
8		Count Masters AIBY	Hyper-Casual
9		Tall Man Run Supersonic	Hyper-Casual
10		Cubes Control SayGames	Puzzle

Revenue

1		Lineage W NCSOFT	MMO
2		天堂M Gamania	MMO
3		星城Online WANIN	Slots
4		奧丁: 神叛 Kakao Games	MMO
5		絕世仙王 絕妙遊戲	MMO
6		Fate/Grand Order Aniplex	RPG
7		少女迴戰 ONEMT	Idle
8		明日方舟 HyperGryph	Tower Defense
9		Garena 傳說對決 GARENA	MOBA
10		天堂2M NCSOFT	MMO

Analysis of Mobile Game Advertisers in China's HK, Macao & TW

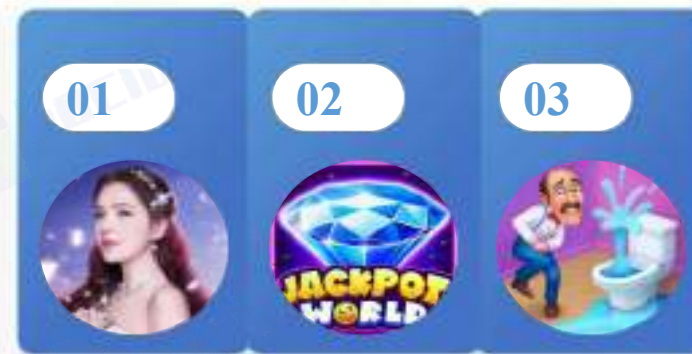
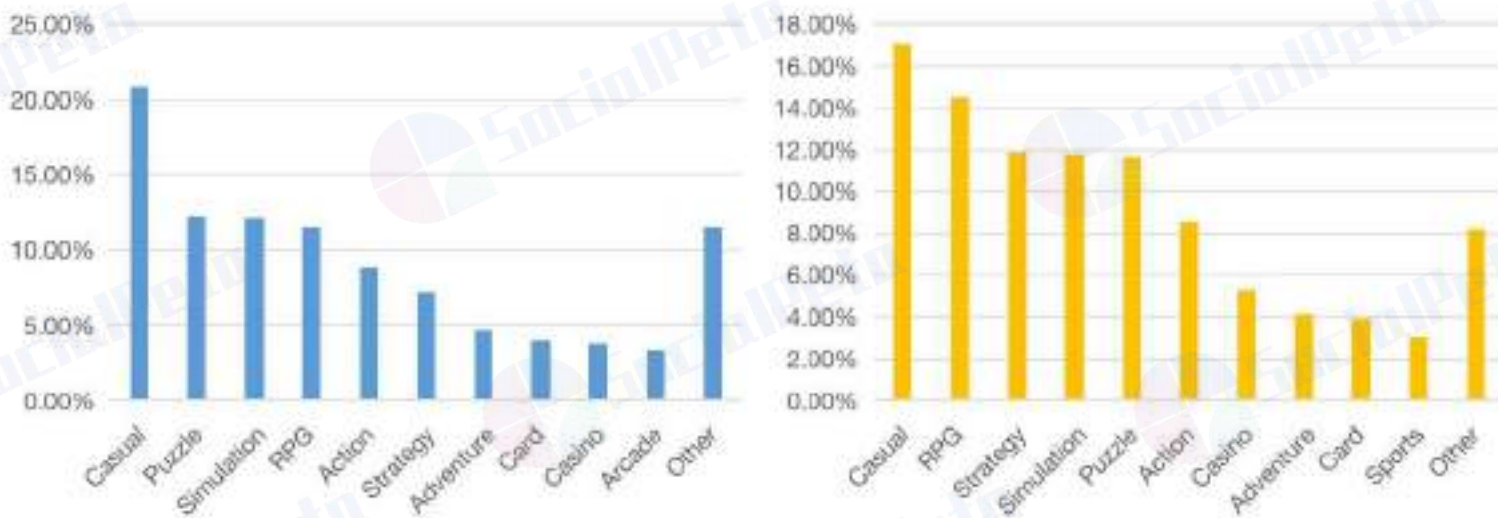
Xianxia MMO was still popular, **RPG** creatives contributed the highest percentage

Percentages of advertising by game genre

Compared to 2021, 2022 saw more variety in the genres of top games by advertising in China's HK, Macao & TW regions, with most advertising strategies being a combination of big amount advertising and flexible media buying.

For the advertising creatives, endorsers **who were advanced in age** could more easily bring back old memories. So user segmentation was achieved through a precise definition of endorsers, which further made precise marketing possible.

■ Active Advertisers ■ Active Creatives



01 圣鎗 02 Jackpot World™ 03 Homescapes

Number of advertisers in each month

Total advertisers in H1: 11.6K; Monthly advertisers:



Source: SocialPeta, based on data retrieved from backend data sources
Date Range: Jan-Jun 2022

Top 10 Mobile Games in the USA

Download

1		Subway Surfers Sybo Games	Parkour
2		Diablo Immortal Blizzard Entertainment, Inc.	ARPG
3		Apex Legends Mobile Electronic Arts	Shooter
4		Fill The Fridge! Rollic Games	Hyper-Casual
5		Bucket Crusher Voodoo	Hyper-Casual
6		Roblox Roblox	Sandbox
7		Tall Man Run Supersonic	Hyper-Casual
8		Stumble Guys Kitka Games	Battle Royale
9		Fishdom Playrix	Match-3
10		Magic Tiles 3 Amanotes	Music

Revenue

1		Candy Crush Saga King	Match-3
2		Roblox Roblox	Sandbox
3		State of Survival FunPlus	SLG
4		Homescapes Playrix	Match-3
5		Pokémon GO Niantic	Action
6		Royal Match Dream Games	Match-3
7		Diablo Immortal Blizzard Entertainment, Inc.	ARPG
8		Clash of Clans Supercell	SLG
9		Evony Top Games	SLG
10		DoubleDown™ Casino Double Down	Slots

Download

1		Apex Legends Mobile Electronic Arts	Shooter
2		Subway Surfers Sybo Games	Parkour
3		Ni no Kuni Netmarble	MMO
4		Move Animals Supersonic	Hyper-Casual
5		Super Cloner 3D Kamil Bilge	Hyper-Casual
6		Bucket Crusher Voodoo	Hyper-Casual
7		Figurine Art TapNation	Hyper-Casual
8		Join Numbers Supersonic	Hyper-Casual
9		Roblox Roblox	Sandbox
10		Parking Jam 3D Popcore Games	Puzzle

Revenue

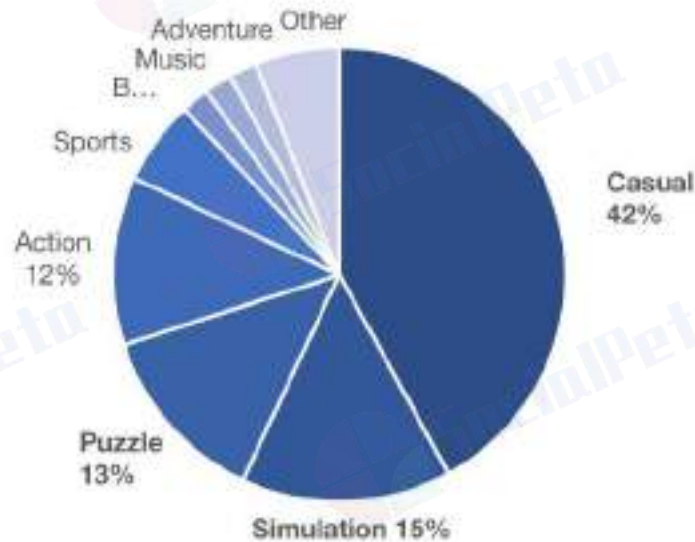
1		Candy Crush Saga King	Match-3
2		Coin Master Moon Active	Party
3		Roblox Roblox	Sandbox
4		Evony Top Games	SLG
5		Bingo Blitz™ Playtika Santa Monica	Bingo
6		RAID Plarium	RPG
7		Candy Crush Soda Saga King	Match-3
8		Garena Free Fire GARENA	Shooter
9		Pokémon GO Niantic	Action
10		Clash of Clans Supercell	SLG

Analysis of Popular Game Genres in the USA

Top 100 mobile games by download & revenue in H1 in the USA
App Store

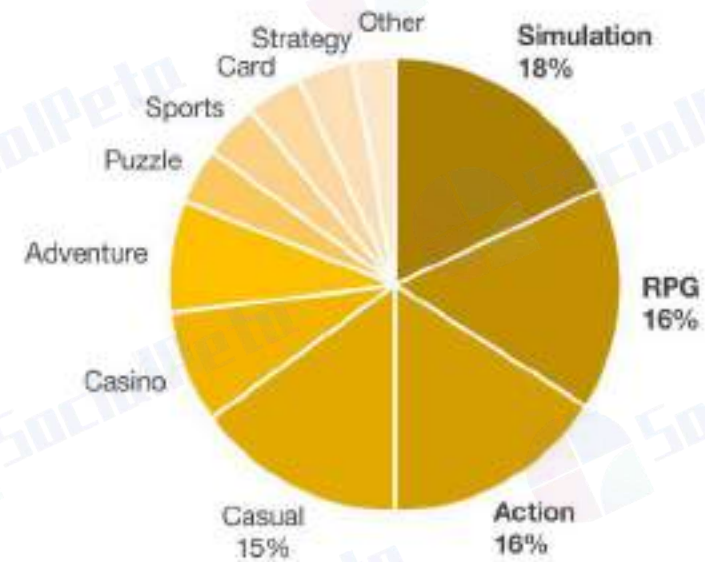
Top 100 by Download

Casual games gained the most spots in the rankings of Top 100 by Download, accounting for 42%, followed by simulation games and puzzle games.



Top 100 by Revenue

Simulation games were the most on the chart of Top 100 by Revenue, accounting for 18%, followed by RPGs and action games.



Analysis of Mobile Game Advertisers in the USA

Casual puzzle games contributed the most advertising;

Mid-core and hard-core games dominated the advertising chart.

Percentages of advertising by game genre

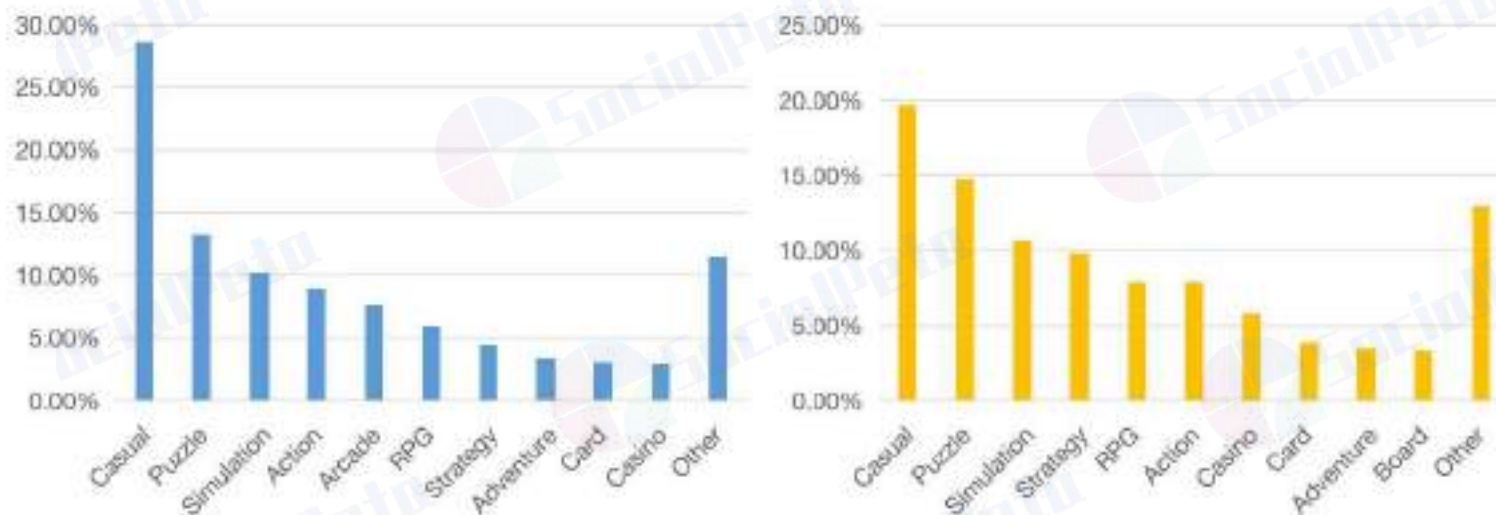
In 2022, the global market reported a YoY decline for the first time, American games even recorded a revenue decline of over 10%.

The American market recorded a significant drop in advertisers in Q1, with a peak of advertising in April.

Hyper-casual and puzzle games contributed over 40% of advertisers to become the hottest game genres by advertising.

In terms of the advertising creatives per game, mid-core and hardcore mobile games, such as SLGs, match-3 games, made the greatest advertising efforts.

■ Active Advertisers ■ Active Creatives



Number of advertisers in each month

Total advertisers in H1: 35K; Monthly advertisers:



Top 10 Mobile Games in Japan

Download

1		Apex Legends Mobile Electronic Arts	Shooter
2		Diablo Immortal Blizzard Entertainment, Inc.	ARPG
3		最強 Qingci Games	Idle
4		Imagineer	ARPG
5		新信長 野望 BBGame	SLG
6		T3 Arena XD Inc.	Shooter
7		Fishdom Playrix	Casual
8		SEGA	Music
9		stop the flow! FTY	Puzzle
10		Bucket Crusher Voodoo	Hyper-Casual

Revenue

1		Fate/Grand Order Aniplex	RPG
2		Genshin Impact miHoYo	Adventure
3		XFLAG	RPG
4		Pokémon GO Niantic	Action
5		Cygames	Simulation
6		GungHo	Puzzle
7		野球 KONAMI	Sports
8		SEGA	Music
9		Music Happy Elements	Music
10		Knives Out NetEase Games	Shooter

Download

1		Miracle Match Imagineer	ARPG
2		Apex Legends Mobile Electronic Arts	Shooter
3		Parking Jam 3D Popcore Games	Puzzle
4		SortPuz JoyPuz	Puzzle
5		反逆 DMMGAMES	Wargame
6		Count Masters AIBY	Hyper-Casual
7		SEGA	Music
8		Lingxi Games	RPG
9		たん Betta Games	Puzzle
10		放置少女 C4-Games	Idle

Revenue

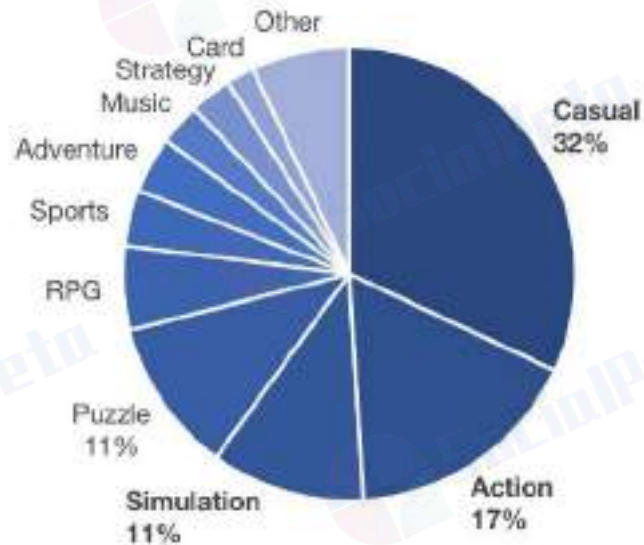
1		Cygames	Simulation
2		XFLAG	RPG
3		Fate/Grand Order Aniplex	RPG
4		GungHo	Puzzle
5		WFS	RPG
6		Puzzles & Survival 37Games	SLG
7		三國志 真戦 Lingxi Games	SLG
8		放置少女 C4-Games	Idle
9		SQUARE ENIX	RPG
10		FFBE幻影戦争 SQUARE ENIX	Wargame

Analysis of Popular Game Genres in Japan

Top 100 mobile games by download & revenue in H1 in Japan
App Store

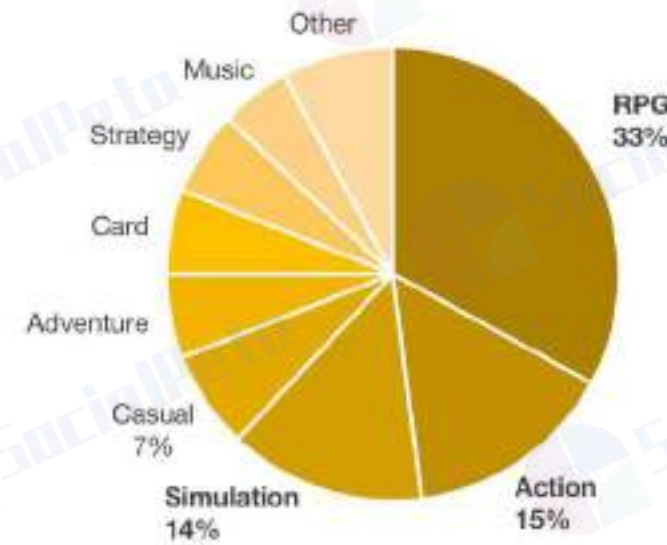
Top 100 by Download

Casual games gained the most spots in the rankings of Top 100 by Download, accounting for 18.7%, followed by action games and simulation games.



Top 100 by Revenue

RPGs were the most on the chart of Top 100 by Revenue, accounting for 33%, followed by action games and simulation games.



Analysis of Mobile Game Advertisers in Japan

Simulation games were outstanding in advertising; **ACGN** games reported a stable revenue.

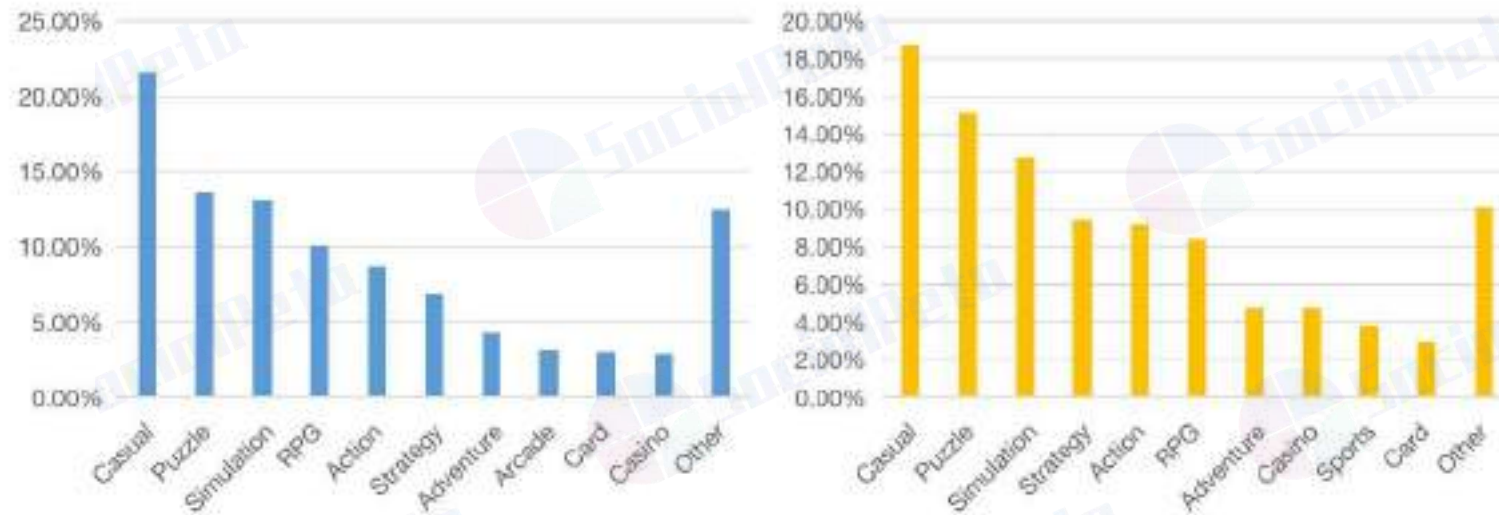
Percentages of advertising by game genre

Seen from the download and revenue performance, the market continued with the trends in 2021. ACGN and PVP were the most popular game elements in Japan, while RPG and business simulation are the most popular game genres.

With an analysis of top games, we can easily notice that IP games have been increasing over years. For example, Diablo and Sanrio all achieved excellent performance. Besides, historical and three kingdoms related games with girl characters have the innate cultural advantages.

In terms of advertising creatives, simulation games and RPGs were outstanding. The ad copies focused on light gameplays that were entertaining and relaxing.

■ Active Advertisers ■ Active Creatives



Number of advertisers in each month

Total advertisers in H1: 11.4K; Monthly advertisers:



Top 10 Mobile Games in South Korea

Download

Revenue

Download

Revenue

1		Diablo Immortal Blizzard Entertainment, Inc.	ARPG
2		NOBLEGAMES	RPG
3		T3 Arena XD Inc.	Shooter
4		Pokémon GO Niantic	Action
5		TenTen AppteenPlanet	Party
6		Ekkorr	RPG
7		Beggars Life Treeplla	Simulation
8		Bilibili	RPG
9		Bucket Crusher Voodoo	Hyper-Casual
10		朝夕光年	Music

1		Diablo Immortal Blizzard Entertainment, Inc.	ARPG
2		M NCSOFT	MMO
3		ONN Kakao Games	MMO
4		NEXON	ARPG
5		FIFA ONLINE 4 M NEXON	Sports
6		Genshin Impact miHoYo	Adventure
7		W NCSOFT	MMO
8		2M NCSOFT	MMO
9		Lilith Games	SLG
10		Pokémon GO Niantic	Action

1		KingKongSOFT	Idle
2		CHAPLIN GAME	RPG Idle
3		Pokémon GO Niantic	Action
4		M: NGELGAMES	Idle
5		37Games	MMO
6		S.O.S: FunPlus	SLG
7		Blockudoku Easybrain	Puzzle
8		Infinite Stairs NFLY STUDIO	Action
9		Cubes Control SayGames	Puzzle
10		Monster Egg HOMA GAMES	Arcade

1		Lineage W NCSOFT	MMO
2		M NCSOFT	MMO
3		ONN Kakao Games	MMO
4		NEXON	ARPG
5		2M NCSOFT	MMO
6		37Games	MMO
7		3 Webzen	MMO
8		& Netmarble	MMO
9		4399	MMO
10		Roblox Roblox	Sandbox

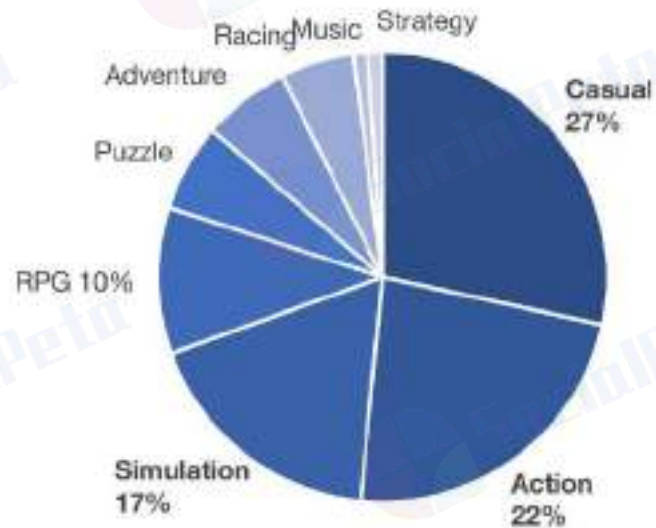
Analysis of Popular Game Genres in South Korea

Top 100 mobile games by download & revenue in H1 in South Korea

App Store

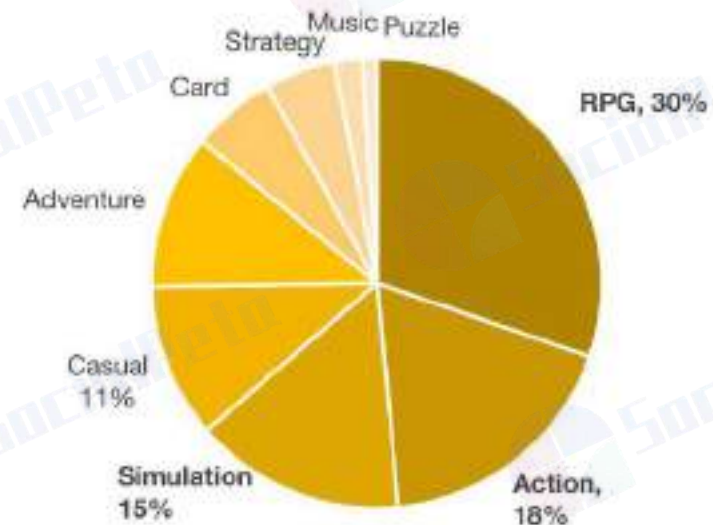
Top 100 by Download

Casual games gained the most spots in the rankings of Top 100 by Download, accounting for 27%, followed by action games and simulation games.



Top 100 by Revenue

RPGs were the most on the chart of Top 100 by Revenue, accounting for 30%, followed by action games and simulation games.



Analysis of Mobile Game Advertisers in South Korea

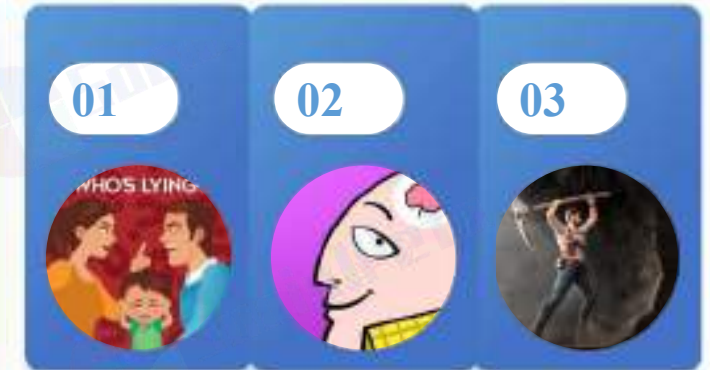
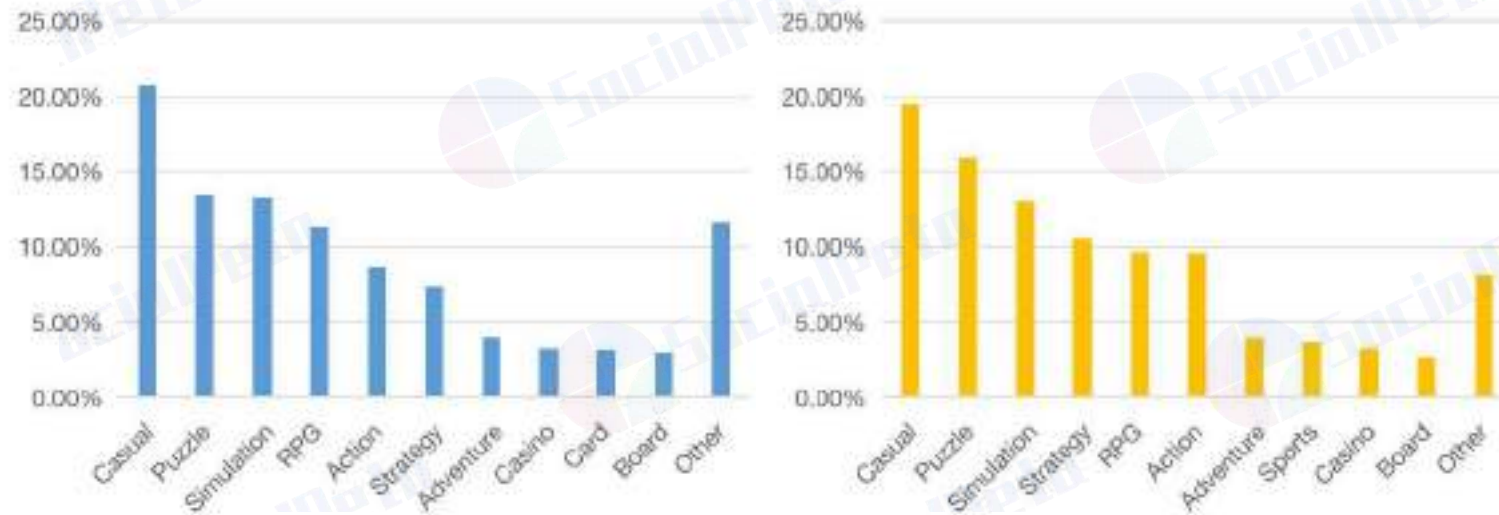
MMO games were still the highest-grossing; **Card RPGs** became the main force in advertising

Percentages of advertising by game genre

Among the top games by download and revenue, MMO still held a dominating position in the South Korean market. However, with few changes in game genres and a long period before new games are available, local game companies in South Korea, such as NCSOFT and Kakao Games, recorded a significant decline in revenue.

In the global game market, South Korean game companies were the fastest to accept NFT games. After [MIR4], the blockchain element could be found in many other mobile games.

■ Active Advertisisers ■ Active Creatives



Brandom 2

Brandom

Last Fortress

Number of advertisers in each month

Total advertisers in H1: 9.8K; Monthly advertisers: 6.2K.



Top 10 Mobile Games in Turkey

Download

Revenue

Download

Revenue

1		Diablo Immortal Blizzard Entertainment, Inc.	ARPG
2		Bucket Crusher Voodoo	Hyper-Casual
3		Tall Man Run Supersonic	Hyper-Casual
4		Subway Surfers Sybo Games	Parkour
5		PUBG MOBILE Level Infinite	Shooter
6		Bus Simulator Zuuks Games	Simulation
7		101 YüzBir Okey Plus Zynga	Board
8		Roblox Roblox	Sandbox
9		Brain Find Eyewind	Puzzle
10		Head Ball 2 MASOMO	Sports

1		PUBG MOBILE Level Infinite	Shooter
2		Evony Top Games	SLG
3		101 YüzBir Okey Plus Zynga	Board
4		Candy Crush Saga King	Match-3
5		Clash of Clans Supercell	SLG
6		Final Fantasy XV Epic	SLG
7		Mobile Legends Moonton	MOBA
8		Rise of Kingdoms Lilith Games	SLG
9		State of Survival FunPlus	SLG
10		Diablo Immortal Blizzard Entertainment, Inc.	ARPG

1		Tall Man Run Supersonic	Hyper-Casual
2		Save the grandmother MondayOFF	Hyper-Casual
3		Join Numbers Supersonic	Hyper-Casual
4		Apex Legends Mobile Electronic Arts	Shooter
5		Fish Eater.io Tap 2 Fun	Hyper-Casual
6		Moneygun Run! Voodoo	Hyper-Casual
7		Monster Egg HOMA GAMES	Arcade
8		Move Animals Supersonic	Hyper-Casual
9		Figurine Art TapNation	Hyper-Casual
10		Merge Master HOMA GAMES	Arcade

1		PUBG MOBILE Level Infinite	Shooter
2		101 Yüzbir Okey Plus Zynga	Board
3		Garena Free Fire GARENA	Shooter
4		Big Fish Casino Big Fish Games	Slots
5		Mobile Legends Moonton	MOBA
6		Lords Mobile IGG	SLG
7		Jackpot Magic Slots Big Fish Games	Slots
8		Game of War Machine Zone	SLG
9		Candy Crush Saga King	Match-3
10		EA SPORTS™ FIFA 22 ELECTRONIC ARTS	Sports

Analysis of Mobile Game Advertisers in Turkey

Esports garnered much attention; **Match-3** games were very likely to become big hits

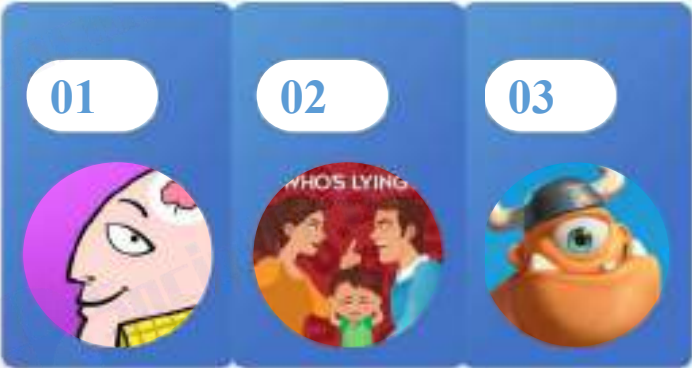
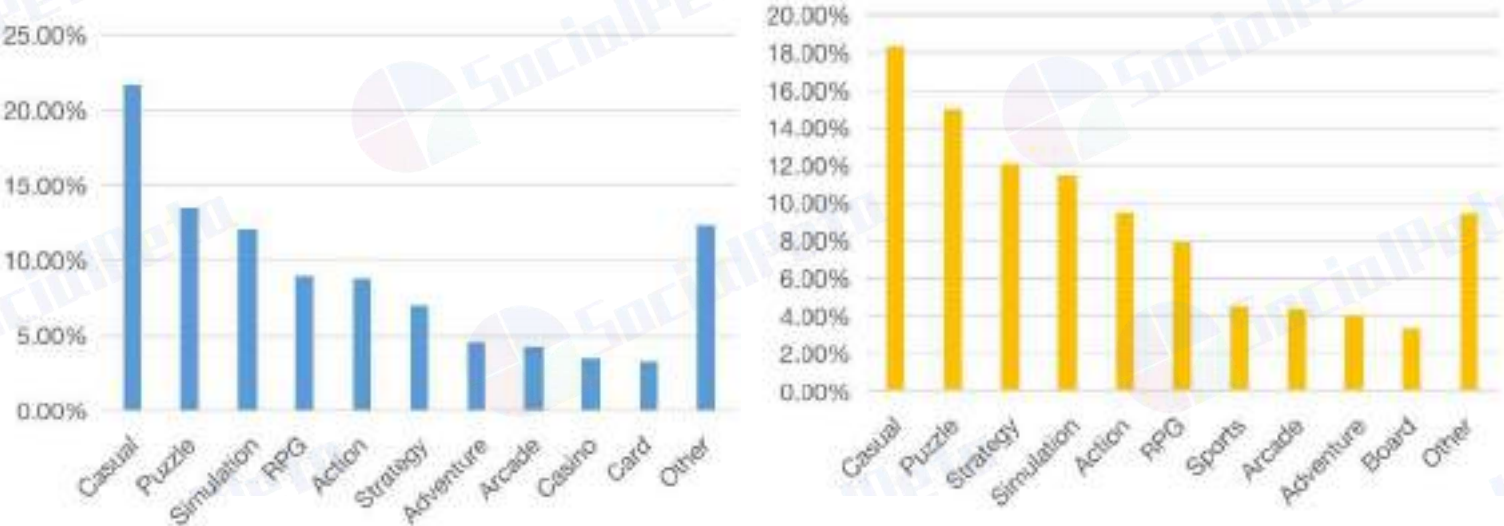
Percentages of advertising by game genre

Since Q1, Turkey has seen a lot of investment and financing activities for casual and puzzle mobile games. This year started with many advertising creatives, with a peak of creatives in January.

The local game developers customized products and services to meet local people's preferences. Casual & puzzle games made great efforts in advertising, such as Dream Games' popular decoration + match-3 game [Royal Match].

Parkour games were very popular in the Turkish market with its large population and great consumption ability. Social + esports games were also highly rated. In December, the World Electronic Sports Games will be held in Turkey. Live streaming matches of influencers, such as [Arena of Valor], earned quite much popularity.

■ Active Advertisers ■ Active Creatives



Braindom Braindom 2 Kingdom Guard

Number of advertisers in each month

Total advertisers in H1: 8.1K; Monthly advertisers: 5.2K.



Top 10 Mobile Games in Southeast Asia

Download

1		Garena Liên Quân Mobile GARENA	MOBA
2		Subway Surfers Sybo Games	Parkour
3		Garena Free Fire GARENA	Shooter
4		Roblox Roblox	Sandbox
5		Mobile Legends Moonton	MOBA
6		8 Ball Pool™ Miniclip	Sports
7		Play Together HAEGIN	Simulation
8		Candy Crush Saga King	Match-3
9		Stumble Guys Kitka Games	Battle Royale
10		Plants vs. Zombies™ 2 PopCap	Strategy

Revenue

1		Genshin Impact miHoYo	Adventure
2		Mobile Legends Moonton	MOBA
3		Roblox Roblox	Sandbox
4		Garena ROV GARENA	MOBA
5		eFootball™ 2022 KONAMI	Sports
6		PUBG MOBILE Level Infinite	Shooter
7		Rise of Kingdoms Lilith Games	SLG
8		Coin Master Moon Active	Party
9		Garena Free Fire GARENA	Shooter
10		Candy Crush Saga King	Match-3

Download

1		Roblox Roblox	Sandbox
2		Subway Surfers Sybo Games	Parkour
3		Mobile Legends Moonton	MOBA
4		Garena Free Fire GARENA	Shooter
5		Find the Alien Moonee	Hyper-Casual
6		Super Sus PIProductions	Party
7		Stickman Party PlayMax Game	Arcade
8		Piano Fire Adaric Music	Music
9		Worms Zone CASUAL AZUR GAMES	Hyper-Casual
10		Higgs Domino Island BOKE	Casino

Revenue

1		Garena Free Fire Garena	Shooter
2		Mobile Legends Moonton	MOBA
3		Roblox Roblox	Sandbox
4		Genshin Impact miHoYo	Adventure
5		Garena ROV Garena	MOBA
6		Coin Master Moon Active	Party
7		Garena Free Fire MAX GARENA	Shooter
8		eFootball PES 2021 KONAMI	Sports
9		PUBG MOBILE Level Infinite	Shooter
10		Higgs Domino Island BOKE	Casino

Analysis of Mobile Game Advertisers in Southeast Asia

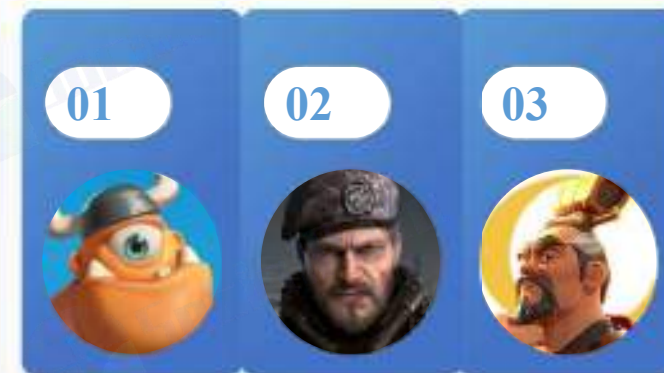
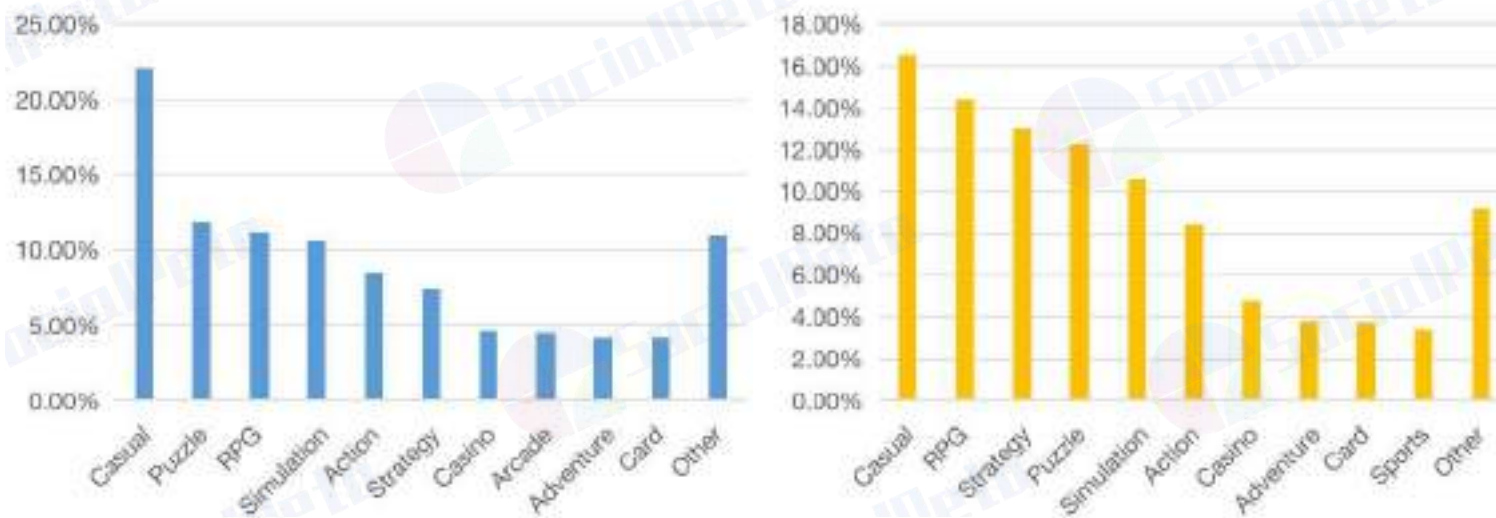
MOBA & Shooter games topped the revenue chart; RPGs had outstanding creatives

Percentages of advertising by game genre

As the 4th biggest internet market in the world, the Southeast Asian mobile game market has expanded very fast. The market is characterized by a large percentage of younger users, female users with high spending power, great popularity of social games, amazing effects of advertising creatives and influencer marketing.

With the current hardware and network environment, Southeast Asian game companies need to spend much more on building servers and improving games.

■ Active Advertisers ■ Active Creatives



Kingdom Guard Last Shelter Rise of Kingdoms

Number of advertisers in each month

Total advertisers in H1: 15.8K; Monthly advertisers: 9.4K.



Top 10 Mobile Games in Middle East

Download

1		Subway Surfers Sybo Games	Parkour
2		PUBG MOBILE Level Infinite	Shooter
3		Fishdom Playrix	Match-3
4		Roblox Roblox	Sandbox
5		Snake.io Kooapps	Hyper-Casual
6		Bridge Race Supersonic	Hyper-Casual
7		8 Ball Pool™ Miniclip	Sports
8		FIFA Soccer Electronic Arts	Sports
9		Going Balls Supersonic	Hyper-Casual
10		Magic Tiles 3 Amanotes	Music

Revenue

1		PUBG MOBILE Level Infinite	Shooter
2		Yalla Ludo Yalla	Board
3		Roblox Roblox	Sandbox
4		Rise of Kingdoms Lilith Games	SLG
5		بلوت تريبعة 广州智品	Card
6		السلطين انتقام ONEMT	SLG
7		Clash of Clans Supercell	SLG
8		Evony Top Games	SLG
9		Top War RiverGame	SLG
10		Royal Match Dream Games	Match-3

Download

1		Subway Surfers Sybo Games	Parkour
2		Merge Master HOMA GAMES	Arcade
3		Going Balls Supersonic	Hyper-Casual
4		FIFA Soccer Electronic Arts	Sports
5		PUBG MOBILE Level Infinite	Shooter
6		Candy Crush Saga King	Match-3
7		Fishdom Playrix	Match-3
8		Snake.io Kooapps	Hyper-Casual
9		Magic Tiles 3 Amanotes	Music
10		8 Ball Pool™ Miniclip	Sports

Revenue

1		PUBG MOBILE Level Infinite	Shooter
2		Yalla Ludo Yalla	Board
3		Garena Free Fire GARENA	Shooter
4		Roblox Roblox	Sandbox
5		Rise of Kingdoms Lilith Games	SLG
6		Top War RiverGame	SLG
7		Evony Top Games	SLG
8		State of Survival FunPlus	SLG
9		Mobile Legends Moonton	MOBA
10		Clash of Clans Supercell	SLG

Analysis of Mobile Game Advertisers in Middle East

Strategy games were popular in the region; Heavily customized SLGs dominated the chart

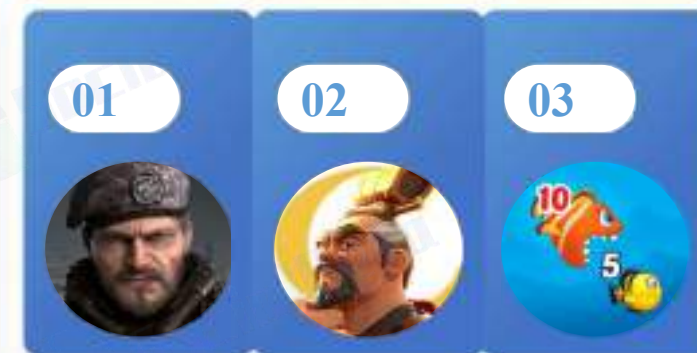
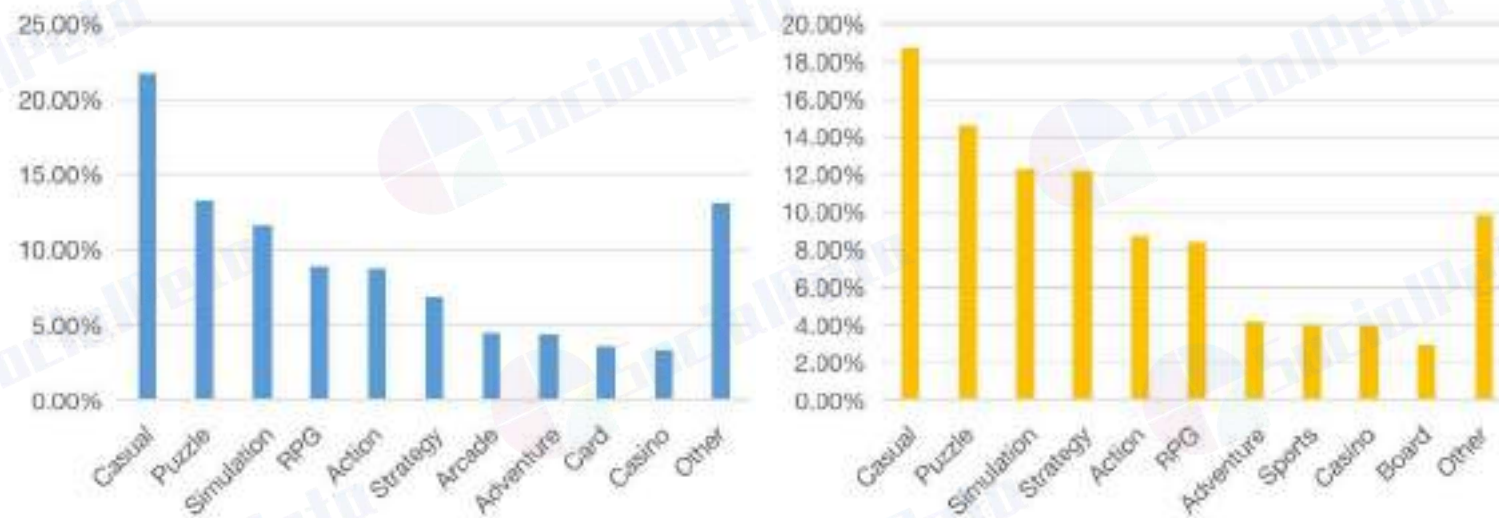
Percentages of advertising by game genre

As a Blue Ocean market with great potential, the Middle East market has attracted considerable attention with its three major characteristics: a high percentage of young users, a high penetration of smart phones, and a high willingness to spend money.

The region is weak in game research and development, so it's common to see many companies from other regions on the chart. Strategy games, especially SLGs that were localized for the Middle East region, recorded outstanding revenue.

As for advertising creatives, Arabic short stories that agreed with the local cultures could obviously improve the creatives' impressions and conversion rate.

■ Active Advertisers ■ Active Creatives



01 Last Shelter 02 Rise of Kingdoms 03 Fishdom

Number of advertisers in each month

Total advertisers: 10.6K; Monthly advertisers: 6.7K.



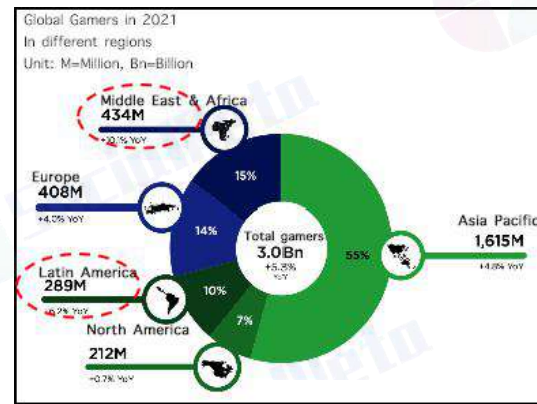
Analysis of Mobile Game Advertisers in Middle East



Middle East is an emerging market with the fastest-growing gamers

According to Newzoo Global Mobile Market Report 2021, Middle East and Africa reported revenue growth rates that were much higher than the average rate. In 2021, the market size and number of gamers grew at 4.8% and 10.1%, respectively. The upgraded network infrastructure and the popularization of smart phones and mobile network packages in the region have boosted the growth of the game industry (Chart 1 & 2) and enriched the network experience. Phone users in Middle East like AR filters very much. Snapchat users from Saudi Arabia generated over 90 billion views for AR filters during Ramadan in 2021.

The game market survey company NocoPartner predicted that, as of 2025, the total number of gamers will grow to 85.8 million in the three major markets in Middle East and North Africa (MENA): Saudi Arabia, the UAE and Egypt, reaching \$3.1 billion in annual revenue (Chart 3). Snapchat also had a very high penetration rate in those markets, with a penetration rate of over 90% among people of age 13-34 in Saudi Arabia.



More and more cases have proven that it's possible to copy the success in the Middle East market.

As the international game market slowed down, game companies increased their exploration of emerging markets. In Middle East, Chinese app companies have achieved more and more reproducible successes. Snapchat has helped many game titles gain popularity worldwide. Among these, PUBG MOBILE topped No.1 in terms of sales in Saudi Arabia and Turkey. And Revenge of Sultans, a game completely customized for the Middle East market, stood out among all other SLGs in Middle East, with its monthly in-game revenue of around \$5 million.

Top 10 Mobile Games in South America

Download

Revenue

Download

Revenue

1		Subway Surfers Sybo Games	Parkour
2		Stumble Guys Kitka Games	Battle Royale
3		Garena Free Fire GARENA	Shooter
4		8 Ball Pool™ Miniclip	Sports
5		Roblox Roblox	Sandbox
6		Clash Royale Supercell	Card
7		Call of Duty®: Mobile Tencent & Activision Blizzard	Shooter
8		Candy Crush Saga King	Match-3
9		Count Masters AIBY	Hyper-Casual
10		Fishdom Playrix	Match-3

1		Garena Free Fire GARENA	Shooter
2		Candy Crush Saga King	Match-3
3		Coin Master Moon Active	Party
4		Roblox Roblox	Sandbox
5		Clash Royale Supercell	Card
6		Gardenscapes Playrix	Match-3
7		Homescapes Playrix	Match-3
8		Stumble Guys Kitka Games	Battle Royale
9		Call of Duty®: Mobile Tencent & Activision Blizzard	Shooter
10		Genshin Impact miHoYo	Adventure

1		Stumble Guys Kitka Games	Battle Royale
2		Subway Surfers Sybo Games	Parkour
3		Garena Free Fire GARENA	Shooter
4		Roblox Roblox	Sandbox
5		Pou Zakeh	Simulation
6		Race Master 3D SayGames	Hyper-Casual
7		Craftsman StarGame22	Simulation
8		Merge Master HOMA GAMES	Arcade
9		Piano Fire Adaric Music	Music
10		Among Us InnerSloth	Social deduction

1		Coin Master Moon Active	Party
2		Garena Free Fire GARENA	Shooter
3		Roblox Roblox	Sandbox
4		Clash of Clans Supercell	SLG
5		Call of Duty®: Mobile Tencent & Activision Blizzard	Shooter
6		Candy Crush Saga King	Match-3
7		Garena Free Fire MAX GARENA	Shooter
8		Stumble Guys Kitka Games	Battle Royale
9		Clash Royale Supercell	Card
10		Lords Mobile IGG	SLG

Analysis of Mobile Game Advertisers in South America

Action and simulation games focused on advertising; **Card** games showed strong momentum.

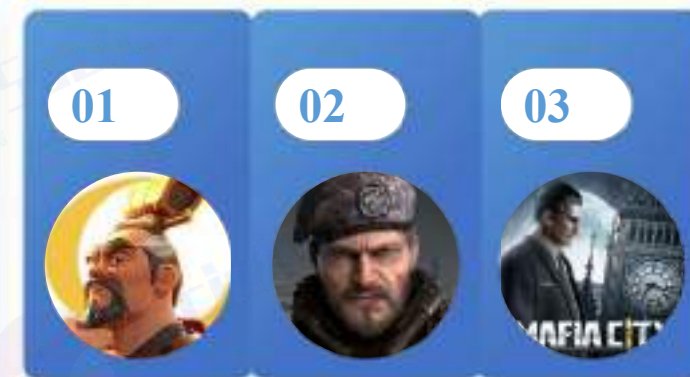
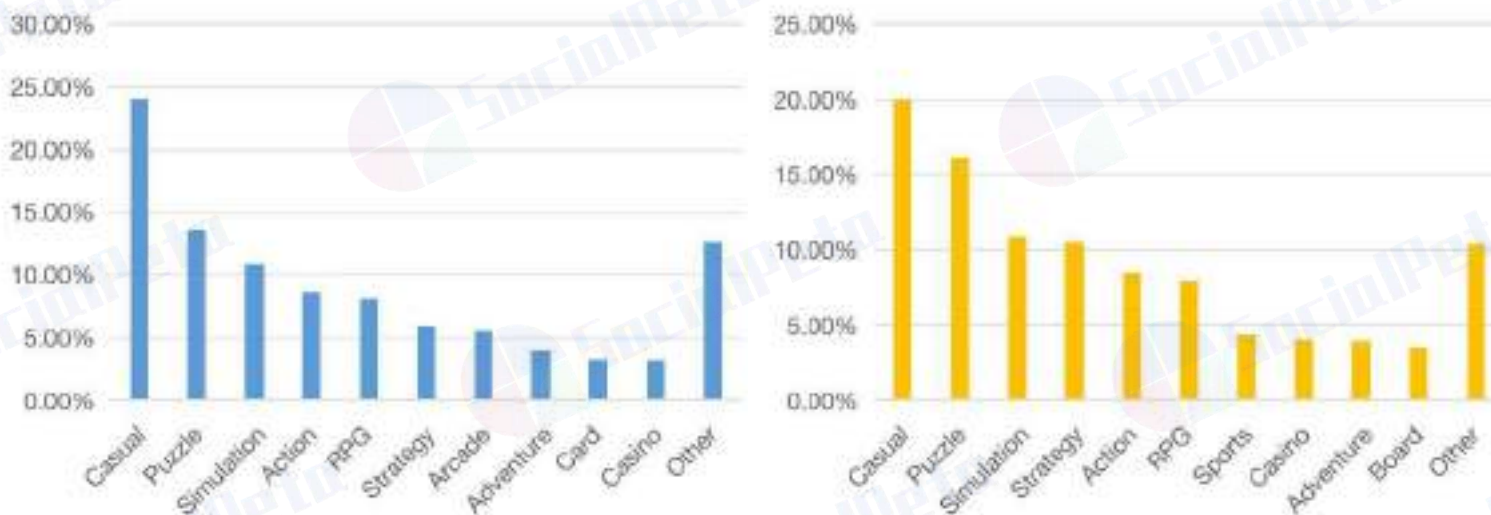
Percentages of advertising by game genre

With a population of 400 million people, South America is a very promising blue ocean market of network. Action and casual mobile games are very popular there.

Compared to expensive console games and PC games, mobile games are easier to access and there enjoy quite an advantage in the Brazilian market. As for operating systems, Android users are more than iOS users.

Thanks to the Brazilian policies, offshore casino games and competitive card games have become the important channels for people to enjoy the pleasure of competition.

■ Active Advertisisers ■ Active Creatives



Rise of Kingdoms Last Shelter Mafia City

Number of advertisers in each month

Total advertisers: 12.5K; Monthly advertisers: 7.5K.



Top 10 Mobile Games in South Asia

Download

1		BATTLEGROUNDS KRAFTON	Shooter
2		Ludo King Gametion	Board
3		Subway Surfers Sybo Games	Parkour
4		Candy Crush Saga King	Match-3
5		8 Ball Pool™ Miniclip	Sports
6		WinZO Games TICTOK SKILL GAMES	Casino
7		Going Balls Supersonic	Hyper-Casual
8		Bridge Race Supersonic	Hyper-Casual
9		Cricket League Miniclip	Sports
10		Evony Top Games	SLG

Revenue

1		BATTLEGROUNDS KRAFTON	Shooter
2		Candy Crush Saga King	Match-3
3		PUBG MOBILE Level Infinite	Shooter
4		Evony Top Games	SLG
5		Coin Master Moon Active	Party
6		Blackjack 21 KamaGames	Casino
7		Clash of Clans Supercell	SLG
8		Top War RiverGame	SLG
9		Call of Duty®: Mobile Tencent & Activision Blizzard	Shooter
10		Roblox Roblox	Sandbox

Download

1		Ludo King Gametion	Board
2		Garena Free Fire MAX GARENA	Shooter
3		Carrom Pool Miniclip	Sports
4		Subway Surfers Sybo Games	Parkour
5		Candy Crush Saga King	Match-3
6		Merge Master HOMA GAMES	Arcade
7		Subway Princess Runner 常春藤移动	Parkour
8		Truck Simulator Games Wing	Simulation
9		Hill Climb Racing Fingersoft	Racing
10		Temple Run Imangi Studios	Parkour

Revenue

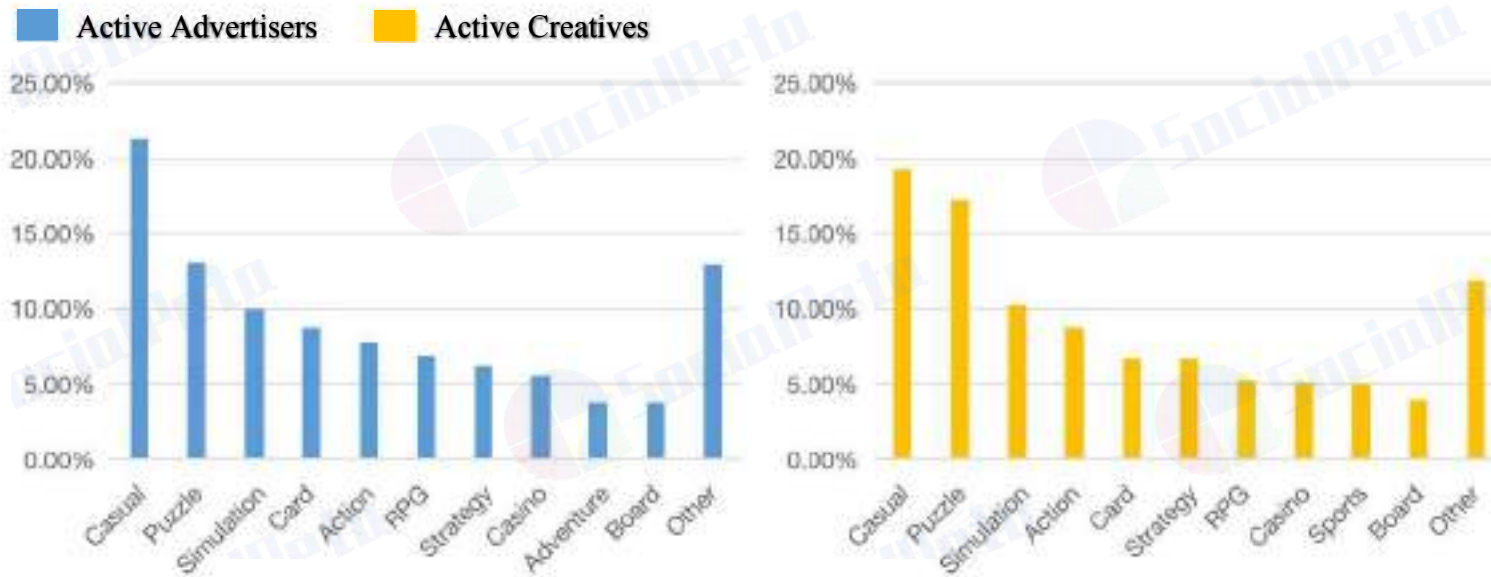
1		Garena Free Fire MAX GARENA	Shooter
2		BATTLEGROUNDS KRAFTON	Shooter
3		Coin Master Moon Active	Party
4		Clash of Clans Supercell	SLG
5		Teen Patti Octro Octro	Board
6		Candy Crush Saga King	Match-3
7		Garena Free Fire GARENA	Shooter
8		Call of Duty®: Mobile Tencent & Activision Blizzard	Shooter
9		Evony Top Games	SLG
10		Teen Patti Gold Poker & Rummy Moonfrog	Casino

Analysis of Mobile Game Advertisers in South Asia

Gun+car+ball games raked in revenue; **Simulation** games were big spenders in advertising

Percentages of advertising by game genre

Stimulation, action, and sports are the 3 most popular game genres in India, with Gun+car+ball games raking in revenue. Seen from the download and revenue performance, top games need to meet users' social demands, and MOBA games need to provide the function of making friends. Integrating hyper-casual with the gameplay is a way to attract the increasing numbers of Indian female gamers. As the covid-19 pandemic has become a normal part of our lives and offline entertainment is recovering, real money games are becoming less attractive. The gameplay of real money games has been trying to be casual.



Number of advertisers in each month

Total advertisers: 10.0K; Monthly advertisers: 6.0K.





Insights into Global Top Advertising Platforms

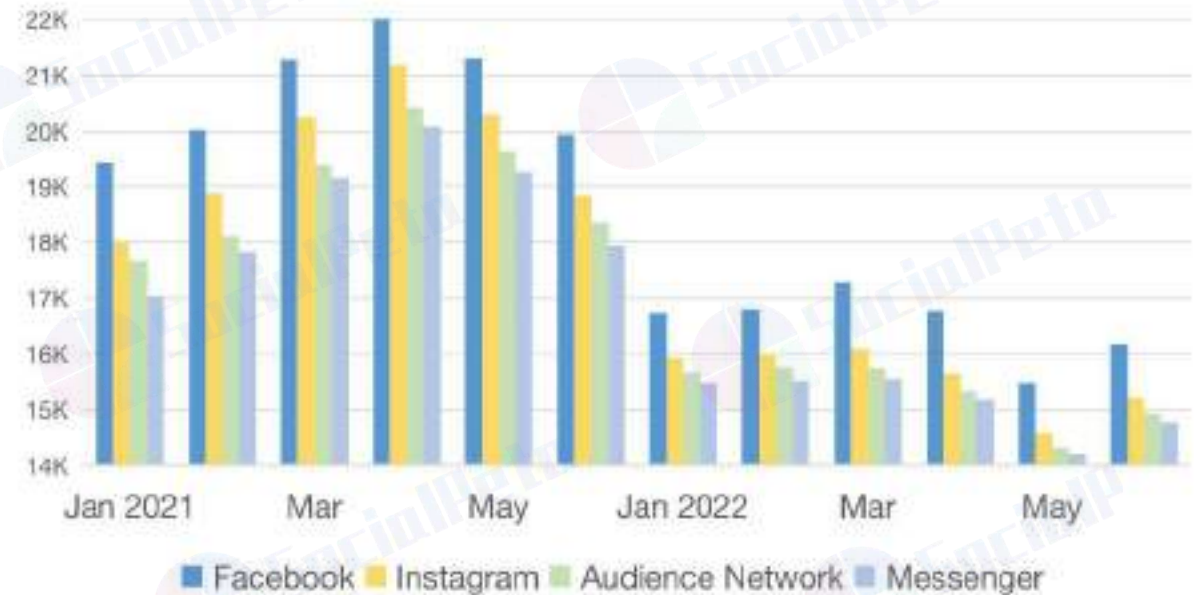
Analysis of Mobile Game Advertising on Meta Platforms

In H1 2022, Meta platforms had over 135,000 game advertisers.











	Total Advertisers	Monthly Advertisers
Facebook	35.2K	16.5K
Instagram	33.5K	15.6K
Audience Network	32.9K	15.3K
Messenger	32.7K	15.1K























H1 2021 saw a sharp decline in the number of game advertisers













Top 10 Game Advertisers on Meta Platforms

Facebook		
1	 Sudoku Learnings	Sudoku
2	 Mafia City Yotta Games	SLG
3	 Braindom 2 Matchingham Games	Puzzle
4	 The Grand Mafia Yotta Games	SLG
5	 Coloring Book Doodle Mobile	Coloring
6	 Braindom Matchingham Games	Puzzle
7	 Find Out Eyewind	Puzzle
8	 Dream Piano Eyugame	Music
9	 Case Hunter Eyewind	Puzzle
10	 Brain Out Eyewind	Puzzle

Instagram		
1	 Mafia City Yotta Games	SLG
2	 The Grand Mafia Yotta Games	SLG
3	 Sudoku Learnings	Sudoku
4	 Braindom 2 Matchingham Games	Puzzle
5	 Coloring Book Doodle Mobile	Coloring
6	 Braindom Matchingham Games	Puzzle
7	 Yalla Ludo Yalla	Board
8	 Find Out Eyewind	Puzzle
9	 Dream Piano Eyugame	Music
10	 Case Hunter Eyewind	Puzzle

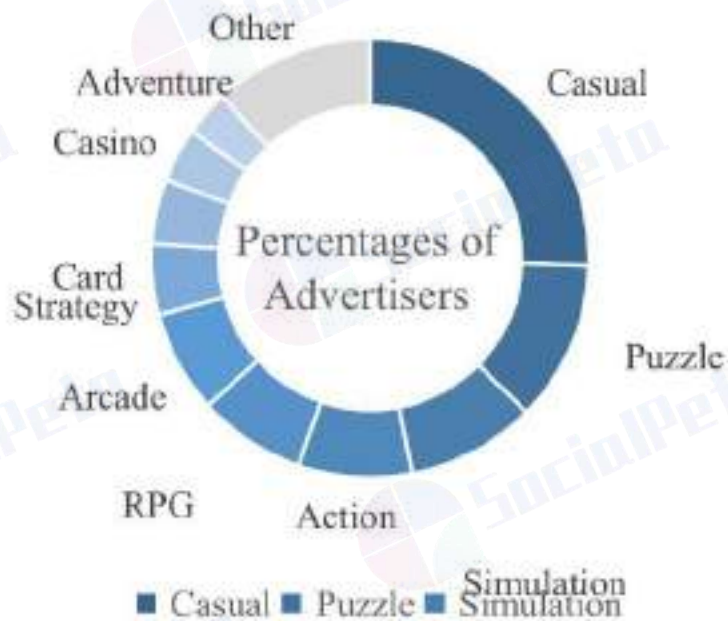
Audience Network		
1	 Mafia City Yotta Games	SLG
2	 The Grand Mafia Yotta Games	SLG
3	 Sudoku Learnings	Sudoku
4	 Braindom 2 Matchingham Games	Puzzle
5	 Coloring Book Doodle Mobile	Coloring
6	 Yalla Ludo Yalla	Board
7	 Jackpot World™ Bole Games	Slots
8	 Find Out Eyewind	Puzzle
9	 Braindom Matchingham Games	Puzzle
10	 Dream Piano Eyugame	Music

Messenger		
1	 Mafia City Yotta Games	SLG
2	 The Grand Mafia Yotta Games	SLG
3	 Sudoku Learnings	Sudoku
4	 Braindom 2 Matchingham Games	Puzzle
5	 Coloring Book Doodle Mobile	Coloring
6	 Yalla Ludo Yalla	Board
7	 Find Out Eyewind	Puzzle
8	 Braindom Matchingham Games	Puzzle
9	 Dream Piano Eyugame	Music
10	 Case Hunter Eyewind	Puzzle

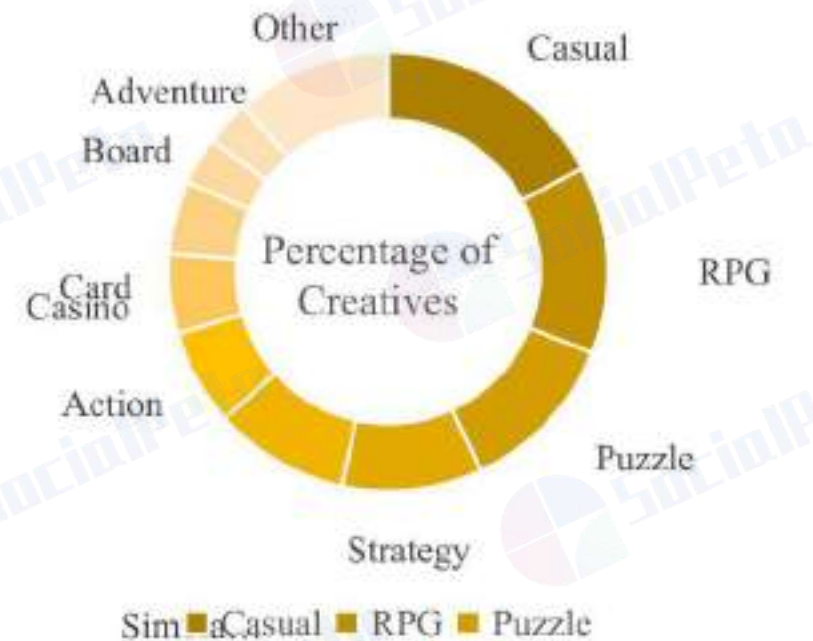
Analysis of Mobile Game Advertising on Meta Platforms

Compared to 2021, action game advertisers declined significantly; RPG game creatives dropped to No.2 on the chart

There were over 34,500 casual game advertisers, the highest number among other game genres, accounting for 25.6%; followed by puzzle and simulation games, which accounted for 11.83% and 9.57%, respectively.



Casual games contributed the most creatives, accounting for 17.23%; followed by creatives for RPGs, which were 1.97 million, with about 10,800 advertisers.



Top Game Streamers on Instagram



Richard Gomes

Followers: 631K
Engagement Rate: 6.7%
Region: Brazil; Portuguese
Suggested Collaboration Cost per Video: \$2272



pochette

Followers: 55.4K
Engagement Rate: 4.9%
Region: Japan; Japanese
Suggested Collaboration Cost per Video: \$786



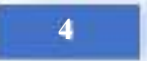
Jeremey (Terminalmontage)

Followers: 8.59k
Engagement Rate: 8.5%
Region: USA; Klingon
Suggested Collaboration Cost per Video: \$1394



rickyedit

Followers: 579K
Engagement Rate: 4.6%
Region: Spain; English
Suggested Collaboration Cost per Video: \$1648



aztecrossgaming

Followers: 48.2K
Engagement Rate: 3.7%
Region: USA; English
Suggested Collaboration Cost per Video: \$246



Source: NoxInfluencer; the gaming influencers are from Instagram, ranked based on Nox's Influencer Ranking. Update time of the ranking: 22/6/2022; Nox's score is calculated based on influencers' followers video views, engagement rates, and other data. Generally, influencers with higher Nox rankings have a higher quality channel.

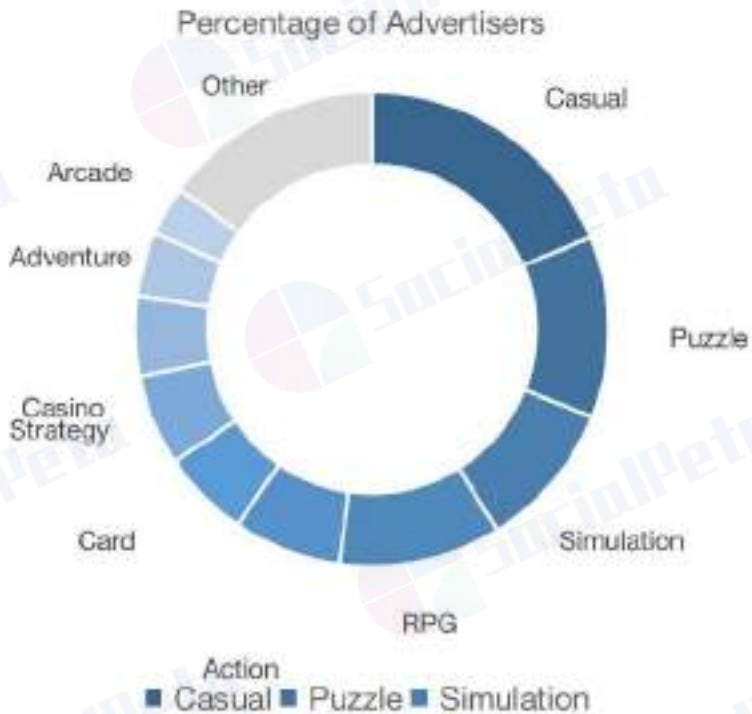
Top 10 Game Advertisers on Google Platforms



Analysis of Mobile Game Advertising on Google Platforms

Casual puzzle games contributed the most advertisers, while RPGs have the most creatives.

There were over 3,900 casual game advertisers, the highest number among other game genres, accounting for 18.7%; followed by puzzle and simulation game advertisers, which accounted for 12.36% and 10.07%, respectively.



RPGs contributed the most creatives, over 1.01 million, accounting for 16.56%, and about 2,300 advertisers.



Analysis of Mobile Game Advertising on Admob Platforms



Total creatives: 579.2K; Monthly creatives: 166K

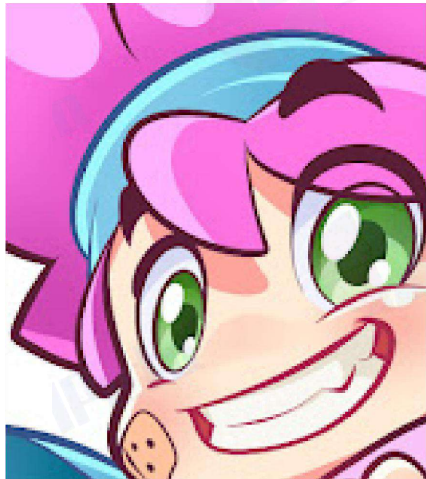
Total advertisers: 17.2K; Monthly advertisers: 8.5K

Compared to 2021, the number of advertisers surged to a peak in Q2, forming a trend that was the same as in 2021.

The number of creatives surged in April, then slumped to the bottom and rebounded in May. Compared to a gentle fluctuation in 2021, the overall number of creatives rose to experience a more drastic fluctuation in 2022.



Top Game Streamers on YouTube



invictor

Subscribers: 17.5M
Views per Video: 3.19M
Region: Spain; Spanish
Suggested Collaboration Cost per Video: \$37282

1



Techno Gamerz

Subscribers: 27.1M
Views per Video: 8.13M
Region: India; English
Suggested Collaboration Cost per Video: \$32813

2



Beluga

Subscribers: 8.59M
Views per Video: 4.26M
Region: USA; English
Suggested Collaboration Cost per Video: \$116019

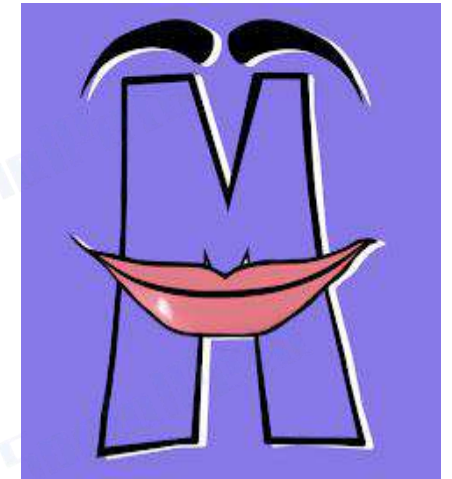
3



Mohak Meet

Subscribers: 5.09M
Views per Video: 0.99M
Region: India; Hindi
Suggested Collaboration Cost per Video: \$2390

4



Mythpat

Subscribers: 12.1M
Views per Video: 4.8M
Region: India; English
Suggested Collaboration Cost per Video: \$18227

5

Source: NoxInfluencer; the gaming influencers are from YouTube, ranked based on Nox's Influencer Ranking.

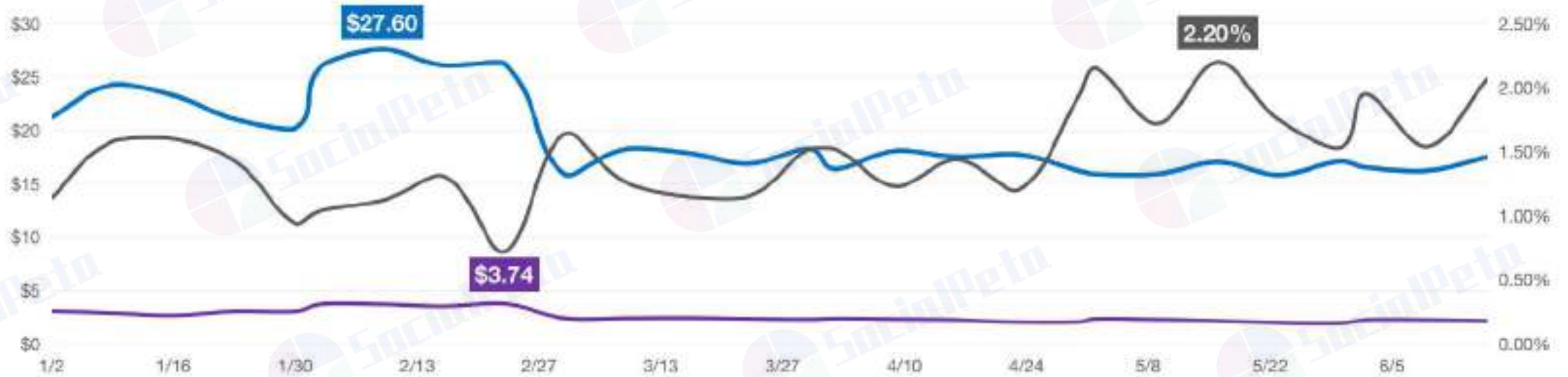
Update time of the ranking: 22/6/2022; Nox's score is calculated based on influencers' subscribers, video views, and other data. Generally, influencers with higher Nox rankings have a higher quality channel



Advertising Cost of Global Mobile Games

Mobile Games' Cost Trends

Advertising cost kept rising; mobile games had a CPM of \$19.31, up 18% MoM.



CPM

\$19.31 MoM↑18%



CPC

\$2.57 MoM↓3%



CTR

1.48% MoM↑7%

Mobile Games' Cost Trends

CPM in USA remained Top 1

CPM was over \$20 in all top 10 countries/regions

Mobile games in USA had the highest advertising cost, with an average CPM of \$27.54, CPC of \$4.22, CTR of 1.16%.

In addition to the USA, CPM surpassed \$25 in the 5 countries/regions including Australia, Japan, Hong Kong (China), and South Korea.

Japan had the highest advertising cost among all the other countries/regions in Asia Pacific, followed by Hong Kong (China) where the CPM beat that in South Korea to become the second highest in Asia Pacific.

Country/Region	CPM (\$)	CPC (\$)	CTR (%)
USA	27.54	4.22	1.16
Australia	26.9	3.99	1.16
Japan	25.93	3.94	0.93
Hong Kong (China)	25.33	3.75	1.06
South Korea	25.13	3.77	1.03
Taiwan (China)	24.42	3.85	0.89
Canada	23.27	3.55	1
Singapore	21.26	2.66	1.59
UK	20.71	3.23	1.32
Germany	20.42	2.78	1.6

Sorted by CPM from high to low

Mobile Games' Cost Trends

Strategy games had the highest average CPM

iOS had a slightly higher advertising cost, with an average CPM that was 15% higher than Android.



iOS

CPM: \$20.08

CPC: \$2.69

CTR: 1.48%



Android

CPM: \$17.46

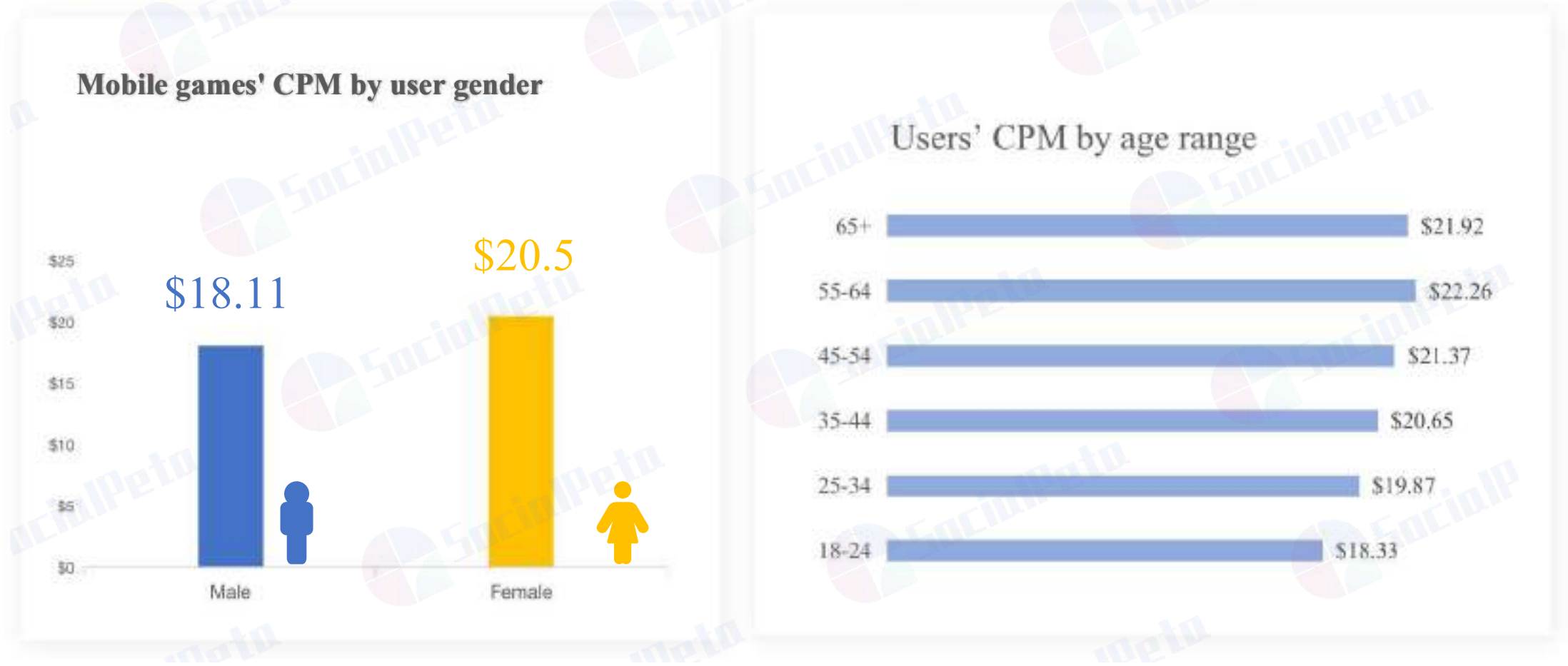
CPC: \$2.4

CTR: 1.47%

Game Genre	CPM (\$)	CPC (\$)	CTR (%)
Casual	17.44	2.91	1.73
Puzzle	18.47	2.95	1.28
RPG	14.73	2.06	1.45
Strategy	21.58	2.99	1.39
Simulation	19.22	2.98	1.49
Action	10.51	1.25	1.33
Casino	12.79	1.28	1.68
Card	16.13	1.82	1.59
Board	7.7	0.6	1.71
Adventure	20.85	2.48	1.44

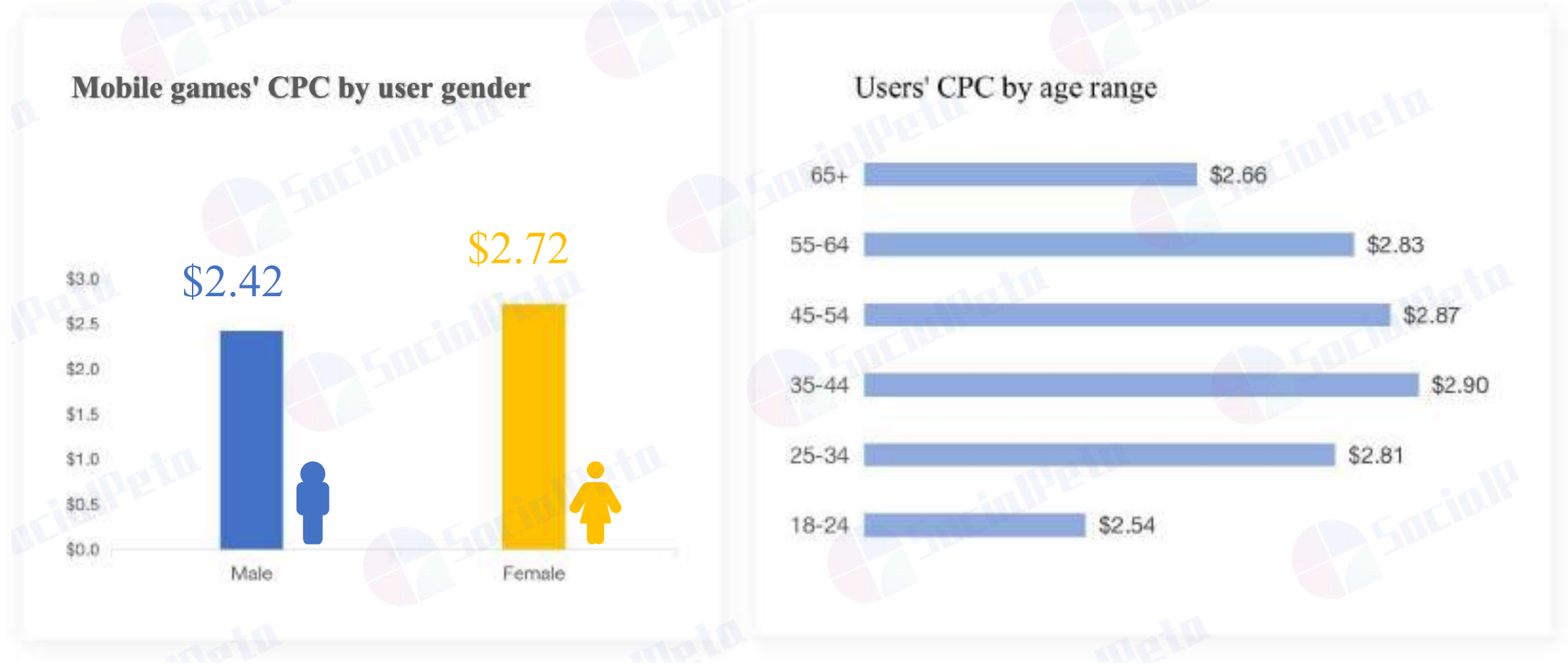
Mobile Games' CPM Trends

Female users' CPM was 13.2% higher than that of male users. People aging 55-64 had the highest average CPM



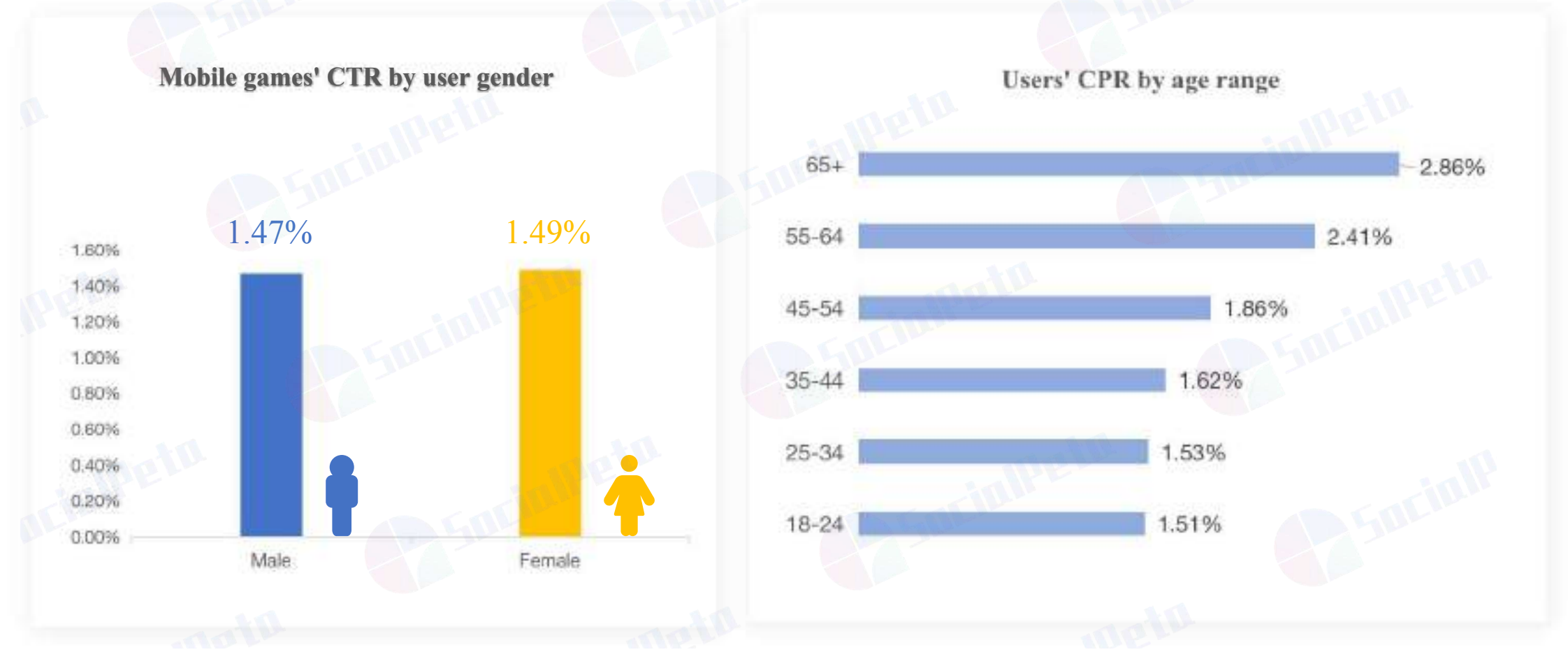
Mobile Games' CPC Trends

Female users' CPC was 12.4% higher than that of male users. People aging 35-44 had the highest average CPC



Mobile Games' CTR Trends

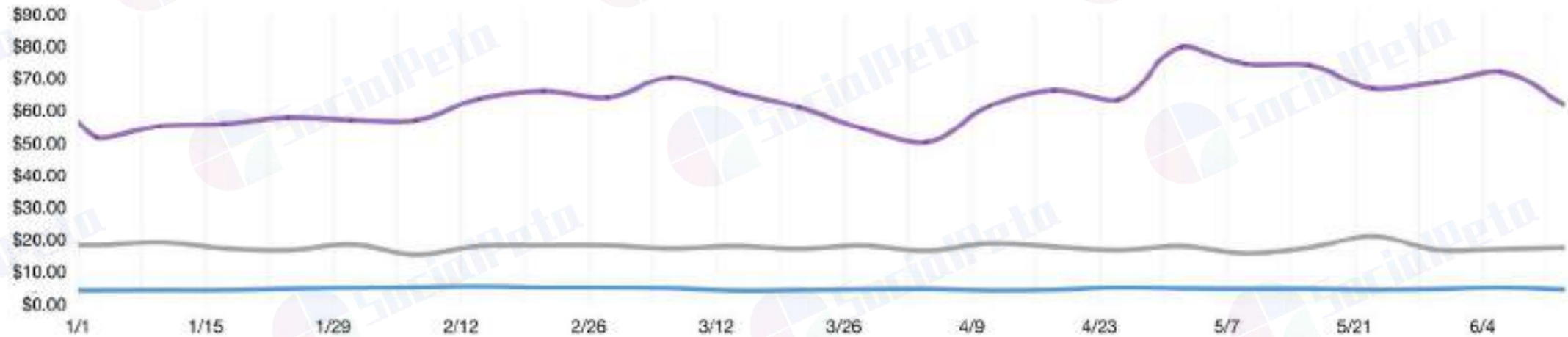
No much difference in the CTR of different genders; CTR was directly proportional to ages.



Mobile Games' CPA Trends

Highest average installment amount is \$5.4

The curves show that there wasn't much change in the costs of installment, purchase, and add to cart in H1 2022, and CPA in Q2 was slightly higher than that in Q1



Installment

Average: \$4.61



Purchase

Average: \$17.61



Add to Cart

Average: \$64.98

Mobile Games' CPI Trends

South Korea had the highest CPI in the world, which was averagely \$13.9

CPI in Asia Pacific was much higher than in other regions. Asia Pacific occupied 6 spots in the top 10 countries/regions by CPI.

For males, the highest CPI is \$6.54 in the age range of 45-54;

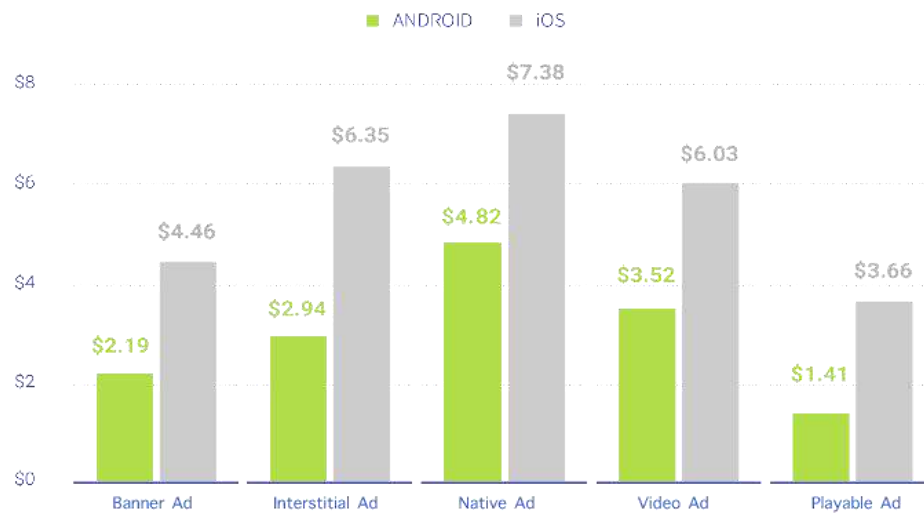
For females, the highest CPI is \$7.33 in the age range of 55-64.



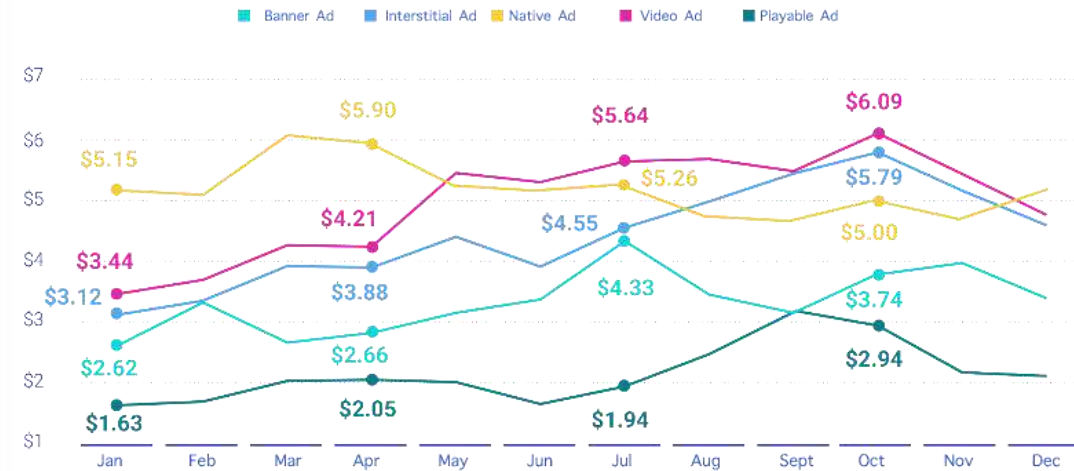
CPI of Different Ad Formats



Operating Systems: Android vs iOS



- Playable ads provide the highest value for game marketers, followed by banner ads.
- All ad formats on Android devices cost less. Banner ads, interstitial ads, and playable ads cost over 2 times more on iOS than on Android.

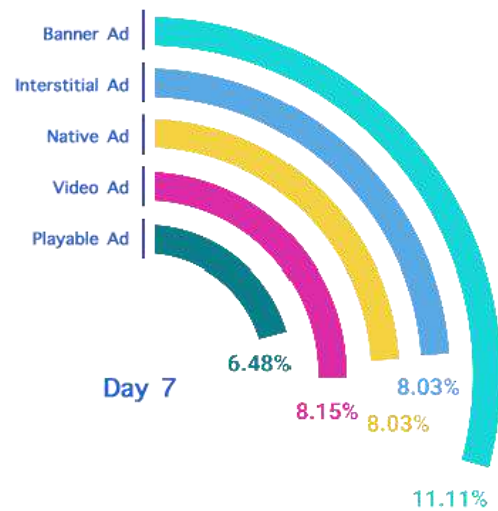


- Though native advertising is the most expensive among all advertising formats, its cost remained stable throughout the year.
- Except September, playable ads were the highest cost-effective.
- During the year, CPI increased for almost all ad formats, with CPI for video ads increasing from \$3.44 to \$6.09. Native advertising was the only exception.

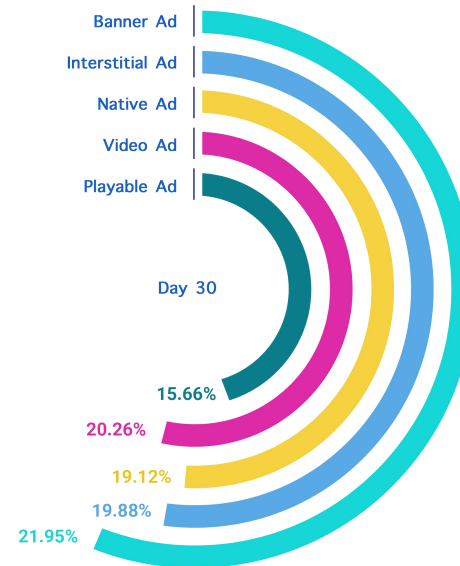
ROAS of Different Ad Formats



ROAS on Day 7



ROAS on Day 30



- Playable ad has the lowest CPI and also the lowest Return On Advertising Spend (ROAS).
- Banner ad has the second lowest CPI but the highest ROAS.
- Native ad had a higher CPI (\$5.22) than interstitial ad (\$4.67), but they had the same ROAS on day 7 and very similar ROAS on day 30.

Ad creatives are the pillar of mobile marketing. As a leading growth acceleration platform in the industry, Liftoff supports mainstream ad formats with its strong creatives service team who are experts in handling the best advertising creatives and localization of various vertical fields. So far Liftoff's creative team has run A/B tests for over 45,000 advertising creatives, each successful test has improved the advertising effect by 12% - 51%. Vungle's Vungle Creative Labs is a professional creative team of nearly 40 talents in creatives, including designers, artists, creative engineers, and data analysts, capable of designing and optimizing advertising creatives based on data.

Liftoff recently launched the program of optimizing and testing multiple creatives, an effective way to reduce test cost and meanwhile greatly increase the test quantity and speed. It can help customers increase ITI by 40%, reduce CPI by 15%, and reduce average CPA by 10% compared to A/B test, offering the best advertising effect.



Marketing Analysis of Popular Game Genres

Top Strategy Games by Advertising



1		The Ants StarUnion	SLG
2		State of Survival FunPlus	SLG
3		歡樂大東家 EWORLD	Business
4		The Grand Mafia Yotta Games	SLG
5		Rise of Kingdoms Lilith Games	SLG
6		Mafia City Yotta Games	SLG
7		蟻族奇兵/AntWars Eskyfun	SLG
8		Kingdom Guard Tap4Fun	SLG
9		Rabbit Empire Yojoy Game	Idle
10		Evony Top Games	SLG
11		Last Fortress IM30	SLG
12		Rise of Empires IM30	SLG
13		Idle Heroes DH Games	RPG
14		Apex Legends Mobile Electronic Arts	Action
15		Puzzles & Survival 37Games	SLG
16		Nonstop Game: Idle RPG Seven Pirates	RPG
17		Warpath: Ace Shooter Lilith Games	SLG
18		Age of Origins Camel Games	SLG
19		Magic: The Gathering Arena Wizards of the Coast	Card
20		Demon God Junhai Games	RPG

1		The Grand Mafia Yotta Games	SLG
2		Lords Mobile IGG	SLG
3		Kingdom Guard Tap4Fun	SLG
4		Rise of Kingdoms Lilith Games	SLG
5		Rise of Empires IM30	SLG
6		The Ants StarUnion	SLG
7		Puzzles & Survival 37Games	SLG
8		Last Shelter IM30	SLG
9		Mafia City Yotta Games	SLG
10		Last Fortress IM30	SLG
11		State of Survival FunPlus	SLG
12		Top War RiverGame	SLG
13		Warpath: Ace Shooter Lilith Games	SLG
14		Evony Top Games	SLG
15		Land of Empires 朝夕光年	SLG
16		Rush Royale MY.COM	Tower Defense
17		Three Kingdoms 必可游戏	SLG
18		World of Tanks Blitz Wargaming Group	Shooter
19		Chief Almighty Yotta Games	SLG
20		Empire: Rising Civilizations OneGame	SLG

Top Strategy Games by Download & Revenue

Download

Revenue

Download

Revenue

1		Clash Royale Supercell	Card
2		PUBG MOBILE Level Infinite	Shooter
3		Pokémon GO Niantic	RPG
4		Clash of Clans Supercell	SLG
5		Pokémon UNITE The Pokemon Company	MOBA
6		State of Survival FunPlus	SLG
7		Woodoku Tripledote Studios	Puzzle
8		Top War RiverGame	SLG
9		Mighty Party Panoramik Games	Strategy
10		Evony Top Games	SLG

1		Pokémon GO Niantic	RPG
2		Clash of Clans Supercell	SLG
3		PUBG MOBILE Level Infinite	Shooter
4		Clash Royale Supercell	Card
5		State of Survival FunPlus	SLG
6		Knives Out NetEase Games	Shooter
7		Puzzles & Survival 37Games	SLG
8		Top War RiverGame	SLG
9		Mafia City Yotta Games	SLG
10		Lords Mobile IGG	SLG

1		Lords Mobile IGG	SLG
2		Evony Top Games	SLG
3		Clash of Clans Supercell	SLG
4		Plants vs. Zombies ELECTRONIC ARTS	Tower Defense
5		Stick War: Legacy Max Games Studios	Strategy
6		Clash Royale Supercell	Card
7		Crazy Car Stunts 3D Multi Tech Apps	Racing
8		State.io CASUAL AZUR GAMES	io
9		Crazy Car Driving Jima Apps	Racing
10		Modern Rickshaw Driving Games Jima Apps	Simulation

1		Lords Mobile IGG	SLG
2		State of Survival FunPlus	SLG
3		Clash of Clans Supercell	SLG
4		Rise of Kingdoms Lilith Games	SLG
5		Top War RiverGame	SLG
6		Mafia City Yotta Games	SLG
7		Puzzles & Survival 37Games	SLG
8		Last Shelter IM30	SLG
9		King of Avalon FunPlus	SLG
10		Clash Royale Supercell	Card

Trends of Strategy Mobile Game Creatives in H1 2022

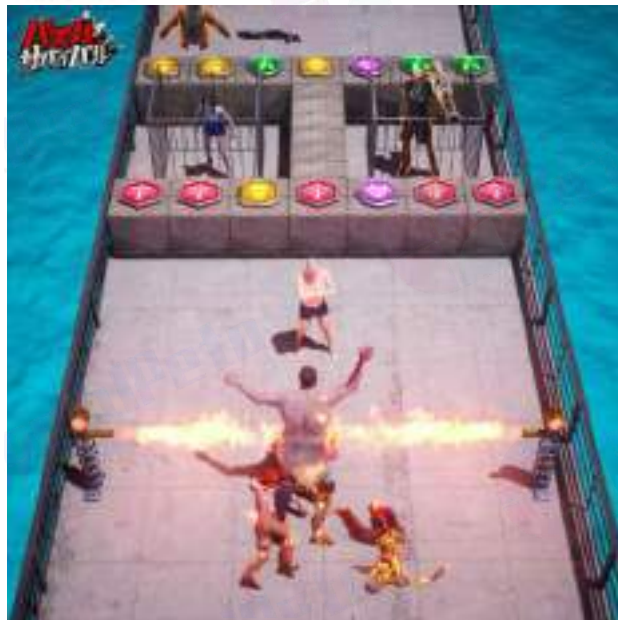
Strategy mobile game creatives are designed with a **lightweight gameplay**

Recently, strategy mobile games would add some casual or puzzle gameplays, such as **snake, matching, and merge**, trying to attract more gamers by featuring “less difficult to start” and “entertaining”.

Usually these games' creatives would include guidance of options to be made, and changing numbers or forced failures would be used to attract people to download and play the games.



Puzzles & Survival



[Click to play](#)



The Grand Mafia



[Click to play](#)



Lords Mobile



[Click to play](#)

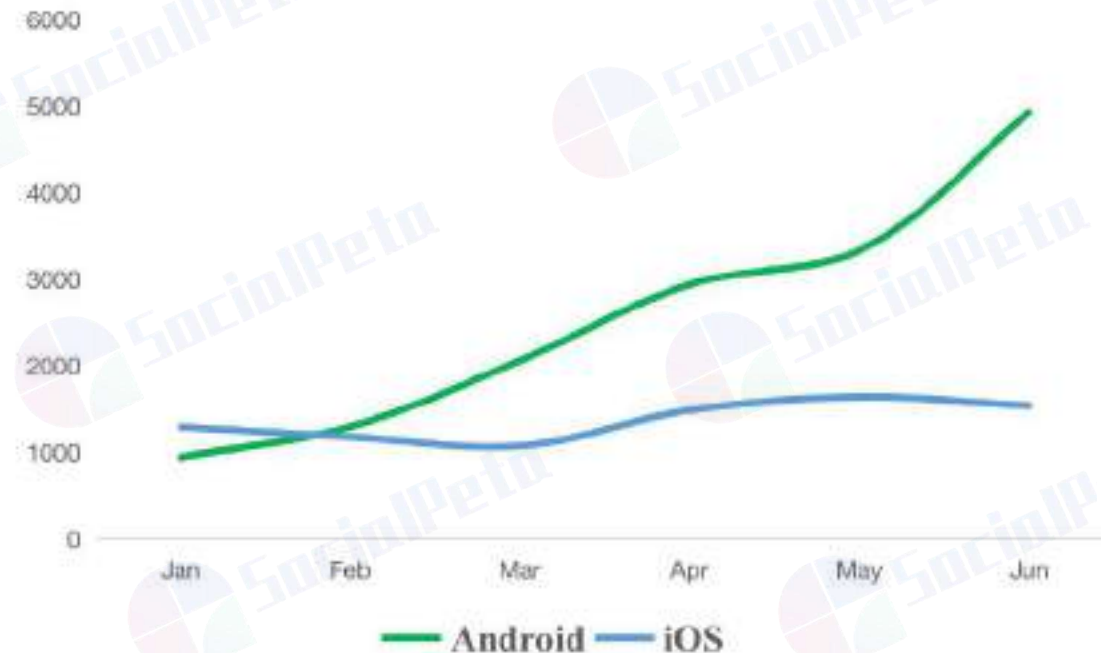
Popular Strategy Mobile Game: State of Survival



Post-
Apocalyptic
Strategy

- Total Duration (in days): 1000+
- H1 Estimated Revenue: \$21M
- H1 Estimated Downloads: 12M
- Top Counties/Regions by Advertising:
USA, Australia, Canada, UK, Germany

[State of Survival] Advertising Trends in H1 2022



Popular Strategy Mobile Game: State of Survival



[Click to play](#)

Over **90%** creatives in H1 were **video creatives**.

Image
9.58%



Video
90.14%

The creatives often start with **daily life scenarios**, such as: doing housework, watching a movie, taking a shower, catching a bus to school, etc.

Top RPGs by Advertising in H1 2022



1		Evertale ZigZaGame	Adventure
2		State of Survival FunPlus	SLG
3		聖樹喚歌 新连信息	Idle
4		Rise of Kingdoms Lilith Games	SLG
5		AZUREA-空 唄- Zlongame	SLG
6		蟻族奇兵AntWars Eskyfun	SLG
7		永夜星神 SpringGame	MMO
8		Evony Top Games	SLG
9		吞食天地3:放置版 9Splay	Idle
10		Legend of the Phoenix Modo Global	Palace

11		DK Mobile NTRANCE	MMO
12		Idle Heroes DH Games	Idle
13		Rise of Empires IM30	SLG
14		奇蹟MU: 正宗續作 Ourpalm	MMO
15		Hero Wars NEXTERS	RPG
16		一念逍遙 Leiting Games	Idle
17		聖鑰 SpringGame	MMO
18		Puzzles & Survival 37Games	SLG
19		花舞宮廷 Origin Mood	Palace
20		Nonstop Game: Idle RPG Seven Pirates	Idle

1		聖鑰 SpringGame	MMO
2		花舞宮廷 Origin Mood	Palace
3		Mythic Heroes IGG	Idle
4		Time Princess IGG	Dress up
5		Kakao	Action
6		聖樹喚歌 新连信息	Idle
7		奇蹟MU: 正宗續作 Ourpalm	MMO
8		Mighty Party Panoramik Games	Strategy
9		一念逍遙 Leiting Games	Idle
10		Legend of Emperor HEYYO GAME	Palace

11		戀戀清庭:邂逅 Ludoo Games	Palace
12		เพลงกระบี่เมฆาพ Century UU	MMO
13		封神异世录 (国际版) Junhai Games	MMO
14		Mirage Eyougame	MMO
15		Escape Crazy Maple Studio	Romance
16		Nonstop Game: Idle RPG Seven Pirates	Idle
17		2X U.LU	MMO
18		MU ORIGIN 3 Ourpalm	MMO
19		Epic Seven Smilegate Megaport	Card
20		Perfect World VNG Tencent Games	MMO

Top RPGs by Download & Revenue in H1 2022

Download

Revenue

Download

Revenue

1		Pokémon GO Niantic	RPG
2		My Talking Angela 2 Outfit7	Simulation
3		Genshin Impact miHoYo	Adventure
4		My Talking Tom 2 Outfit7	Simulation
5		State of Survival FunPlus	SLG
6		Top War RiverGame	SLG
7		My Talking Tom Outfit7	Simulation
8		100 Years Voodoo	Simulation
9		Mighty Party Panoramik Games	Strategy
10		Evony Top Games	SLG

1		Pokémon GO Niantic	RPG
2		Genshin Impact miHoYo	Adventure
3		XFLAG	Puzzle
4		GungHo	Puzzle
5		State of Survival FunPlus	SLG
6		Fate/Grand Order Aniplex	Card
7		Rise of Kingdoms Lilith Games	SLG
8		Puzzles & Survival 37Games	SLG
9		Top War RiverGame	SLG
10		SQUARE ENIX	RPG

1		Cat Runner 常春藤移动	Parkour
2		Miami Rope Hero Newry	Action
3		Hair Dye CrazyLabs	Hyper-Casual
4		Foot Clinic CrazyLabs	Hyper-Casual
5		Bus Simulator Jima Apps	Simulation
6		Fashion Battle Apps Mobile Games	Hyper-Casual
7		Coach Bus Driving Simulator 3D Newry	Simulation
8		Icing On The Dress Lion Studios	Hyper-Casual
9		Mighty Party Panoramik Games	Strategy
10		Special Ops 2020 Fun Shooting Games	Shooter

1		Kakao Games	MMO
2		NCSOFT	MMO
3		Fate/Grand Order Aniplex	Card
4		RAID Plarium	RPG
5		Hero Wars NEXTERS	RPG
6		SQUARE ENIX	RPG
7		Netmarble	MMO
8		MARVEL Strike Force Scopely	RPG
9		Summoners War Com2uS	RPG
10		4399	MMO

Trends of RPG Creatives in H1 2022

RPG creatives were **mostly short videos**, attempting to make the games a **more popular topic of conversation** on the platforms.

RPGs are mostly hardcore. To attract gamers' attention, RPG creatives are generally about stories or contents of the games. With the great popularity of short video apps, advertisers started to design high-quality short video creatives, mainly including **fake VLOG**, **short plays by influencers**, **game stories acted out by real people**, etc., taking advantage of short-video platforms to improve creatives' impressions and games' popularity.



LifeAfter



[Click to play](#)



Thần Vương Chi Mộng



[Click to play](#)



Episode



[Click to play](#)

Popular RPG: Genshin Impact



- Total Duration (in days): 600+
- H1 Estimated Revenue: \$390M
- H1 Estimated Downloads: 19M
- Top Counties/Regions by Advertising:
USA, Australia, Canada, UK, Germany

[Genshin Impact] Advertising Trends in H1 2022



Popular RPG: Genshin Impact

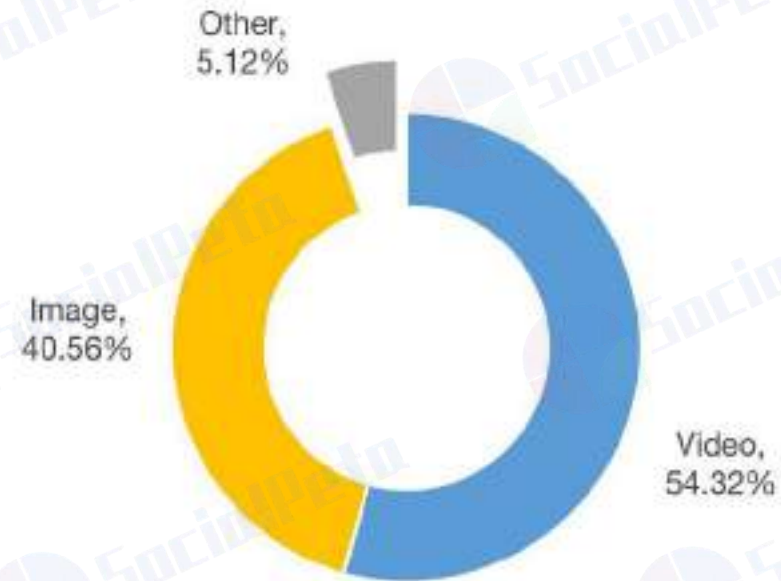
[Genshin Impact]

Started to release **ads with commentary**, adding contents such as “**ranking**” **matches** or something like that.



[Click to play](#)

Over **54%** creatives in H1 were **video creatives**.



Top Simulation Games by Advertising in H1 2022



1	Fishdom Playrix	Farming
2	The Ants StarUnion	SLG
3	歡樂大東家 EWORLD	Business
4	Resortopia DH Games	Business
5	Purrfect Tale DH Games	Business
6	Homescapes Playrix	Puzzle
7	Animal Restaurant DH Games	Business
8	Township Playrix	Farm
9	Family Farm Adventure Century Games	Farm
10	Last Fortress IM30.NET	SLG

11	Mega Tower Youloft Tech	Tower Defense
12	Legend of the Phoenix Modo Global	Palace
13	盛世芳華 Huoyu Game	Palace
14	花舞宮廷 Origin Mood	Palace
15	FIFA Soccer Electronic Arts	Sports
16	Klondike Adventures VIZOR APPS	Farm
17	Idle Magic Academy Longames	Idle
18	叫我大掌櫃 37Games	Business
19	Train Station 2 Pixel Federation	Building
20	Trading Legend 37Games	Business

1	Camping Tycoon SONOW	Business
2	Office Fever Rollic	Hyper-Casual
3	Family Farm Adventure Century Games	Farm
4	Case Hunter EYEWIND	Puzzle
5	歡樂大東家 EWORLD	Business
6	Merge Master Blue Monster OneSoft	Merge
7	Makeup Master Button Software	Makeup & Beauty
8	Idle Lumber Empire Game Veterans	Idle
9	TeenPatti Real Poker gaayyussu	Card
10	Klondike Adventures VIZOR APPS	Farm

11	Township Playrix	Farm
12	My Fantasy Unicorn Media Apps	Romance
13	Idle Magic School Longames	Idle
14	Chapters Crazy Maple Studio	Romance
15	Trading Legend 37Games	Business
16	Legend City TeamLOM	SLG
17	Romance Fate BOKE	Romance
18	盛世芳華 Huoyu Game	Palace
19	Dragonscapes Adventure Century Games	Farm
20	Animal Restaurant DH Games	Business

Top Simulation Games by Download & Revenue in H1 2022

Download

Revenue

Download

Revenue

1		Project Makeover Magic Tavern	Makeup & Beauty
2		Among Us! InnerSloth	Social deduction
3		8 Ball Pool™ Miniclip	Sports
4		Homescapes Playrix	Puzzle
5		My Talking Angela 2 Outfit7	Interactive
6		Fishdom Playrix	Farming
7		Township Playrix	Farm
8		Ball Run 2048 KAYAC	Hyper-Casual
9		Run Rich 3D Voodoo	Hyper-Casual
10		Trading Master 3D Panteon	Puzzle

1		Homescapes Playrix	Puzzle
2		Cygames	Sports
3		Gardenscapes Playrix	Puzzle
4		Project Makeover Magic Tavern	Makeup & Beauty
5		Fishdom Playrix	Farming
6		Township Playrix	Farm
7		Cookie Run: Kingdom Devsisters	Parkour
8		Minecraft Mojang	Sandbox
9		Golf Clash Playdemic	Sports
10		Hay Day Supercell	Farm

1		Fidget Toys Trading Freeplay	Board
2		Fidget Toys 3D Fidget Dev	Hyper-Casual
3		Craftsman: Building Craft StarGame22	Sandbox
4		Phone Case DIY Crazy Labs	Hyper-Casual
5		Sculpt people Crazy Labs	Hyper-Casual
6		DIY Makeup Crazy Labs	Hyper-Casual
7		Fashion Show Dress Up Games for Girls	Makeup & Beauty
8		Solar Smash Paradyme Games	Strategy
9		Pop It Fidget 3D CDT Puzzle Games	Hyper-Casual
10		Jelly Dye Good Job Games	Makeup & Beauty

1		Cygames	Sports
2		Klondike Adventures VIZOR APPS	Farm
3		Fishing Clash Ten Square Games	Sports
4		Fire Emblem Heroes Nintendo	Strategy
5		Design Home Crowdstar	Decoratio n
6		Chapters Crazy Maple Studio	Interactiv e Fiction
7		三國志 霸道 KOEI	Strategy
8		FFBE幻影戦争 SQUARE ENIX	Wargame
9		Redecor Reworks	Decoratio n
10		Dragonscapes Adventure Century Games	Farm

Trends of Simulation Mobile Game Creatives

Simulation games added **drama (helping the mother and her kids or the girl)** to the creatives.

Such creatives are usually combined with easier gameplays, such as **match-3, merge, numerical selection, etc.**, using “**sympathy**” and “**newbie friendly**” to attract female users.

Some effective and high-quality creatives, such as repairing ratty house for the mother and her kids, have been used as game themes to launch many decoration games.



Family Farm Adventure



[Click to play](#)



Matchington Mansion



[Click to play](#)



My Home



[Click to play](#)

Popular Simulation Mobile Game: Chapters



- Total Duration (in days): 1700+
- H1 Estimated Revenue: \$12M
- H1 Estimated Downloads: 3.4M
- Top Countries/Regions by Advertising:
Canada, USA, UK, Germany, France

**[Chapters: Interactive Stories]
Advertising Trends in H1 2022**



Top Casino Games by Advertising



1	Bingo Clash AviaGames	Bingo	11	RummyCircle PLAY GAMES24X7	Card
2	Slots GoldenHoYeah IGS	Slots	12	Cash Party™ MIRROR GAMES	Slots
3	Jackpot World™ BoleGaming	Slots	13	滿貫大亨 SHIZI TECH	Slots
4	Pocket7Games AviaGames	Platform	14	Texas Hold'em Poker KamaGames	Card
5	Jackpocket Lottery App Jackpocket	Lottery	15	Solitaire Cash Papaya Gaming	Card
6	神來也麻將多合1 Gamesofa	Mahjong	16	Cash O Mania KAKAPO GAMES	Slots
7	Four Winds Online Casino MI Four Winds	Slots	17	金好運娛樂城 IGS	Slots
8	Solitaire MobilityWare	Card	18	Grand Cash Gamehaus	Slots
9	Cash Tornado™ Zeroo Gravity	Slots	19	Cash Hoard Hongtaojian	Slots
10	Jackpot Master™ Zeroo Gravity	Slots	20	Blackout Bingo Big Run Studios	Bingo

1	Jackpot World™ BoleGaming	Slots	11	Bingo Frenzy Gluon Interactive	Bingo
2	Lotsa Slots BoleGaming	Slots	12	Cash Tornado™ Zeroo Gravity	Slots
3	Cash Frenzy™ BoleGaming	Slots	13	Cash Blitz Slots Triwin Games	Slots
4	Jackpot Master™ Zeroo Gravity	Slots	14	Jackpot Party SciPlay	Slots
5	Golden HoYeah IGS	Slots	15	DoubleDown DoubleDown	Slots
6	Tongits Go PLAYJOY	Card	16	Teen Patti Master RASHMI KUSHWAH	Card
7	Jackpot Crush BoleGaming	Slots	17	Gold Fish SciPlay	Slots
8	Cash Bash Casino BoleGaming	Slots	18	Slotomania™ Playtika	Bingo
9	Vegas Friends BoleGaming	Card	19	Quick Hit SciPlay	Slots
10	Four Winds Online Casino MI Four Winds	Slots	20	Club Vegas Slots Bagelcode	Slots

Top Casino Games by Download & Revenue

Download

Revenue

Download

Revenue

1		Blackout Bingo Big Run Studios	Bingo
2		Bingo Clash AviaGames	Bingo
3		Solitaire MobilityWare	Card
4		Solitaire Cash Papaya Gaming	Card
5		Solitaire Cube Tether Studios	Card
6		Bubble Cash Papaya Gaming	Puzzle
7		Pocket7Games AviaGames	Platform
8		Zynga Poker Zynga	Card
9		DraftKings DraftKings	Sports
10		World Series of Poker Playtika	Card

1		Slotomania™ Playtika	Bingo
2		Bingo Blitz™ Playtika	Bingo
3		Jackpot Party Phantom EFX	Bingo
4		DoubleDown™ Double Down Interactive	Slots
5		Lightning Link Casino Product Madness	Slots
6		Cashman Casino Product Madness	Slots
7		Heart of Vegas Product Madness	Slots
8		Cash Frenzy™ BoleGaming	Slots
9		House of Fun™ Playtika	Slots
10		Huuuge Casino Slots Vegas 777 Huuuge Global	Slots

1		Teen Patti Gold Moonfrog	Card
2		Slotomania™ Playtika	Bingo
3		GAMEE Prizes Gamee	Play-to-Earn
4		House of Fun™ Playtika	Slots
5		Tongits Go PLAYJOY	Card
6		Jackpot World™ BoleGaming	Slots
7		POP! Slots™ PlayStudios	Slots
8		Teen Patti Octro Octro	Card
9		Cash Frenzy™ BoleGaming	Slots
10		Golden HoYeah IGS	Slots

1		Slotomania™ Playtika	Bingo
2		Cash Frenzy™ BoleGaming	Slots
3		Huuuge Casino Slots Vegas 777 Huuuge Global	Slots
4		Jackpot Party SciPlay	Slots
5		Lotsa Slots BoleGaming	Slots
6		Jackpot World™ BoleGaming	Slots
7		Cashman Casino Product Madness	Slots
8		POP! Slots™ PlayStudios	Slots
9		House of Fun™ Playtika	Slots
10		Lightning Link Casino Product Madness	Slots

Trends of Casino Mobile Game Creatives

Fish catching, beer, gold gush: diversified and with specific prizes

Casino game creatives are mostly about gameplays. The videos usually start with “winning” small prizes, lowering audience's expectations, which are quickly followed by big prizes, giving users a great feeling of achievement.

And the free coins shown in the creatives are the key to attracting gamers to download the games, which are usually in millions.



Show Me Vegas Slots Casino



[Click to play](#)



Wynn Slots



[Click to play](#)



Cash Winner Casino Slots



[Click to play](#)

Popular Casino Mobile Game: Cash Frenzy™



- Total Duration (in days): 1300+
- H1 Estimated Revenue: \$73M
- H1 Estimated Downloads: 2M
- Top Countries/Regions by Advertising:
USA, Australia, Canada, UK, France

**[Cash Frenzy™]
Advertising Trends in H1 2022**



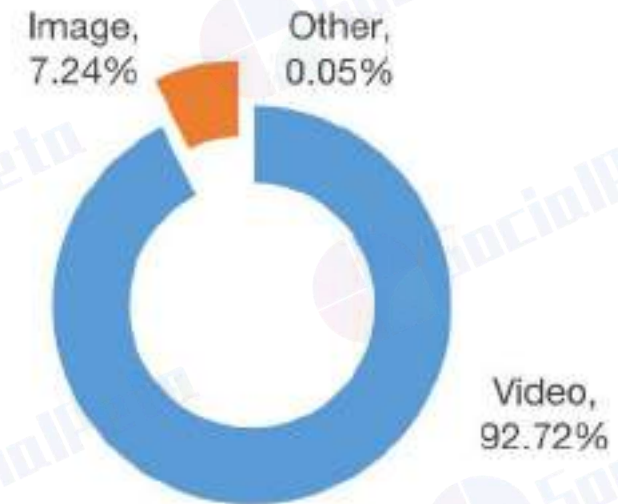
Popular Casino Mobile Game: Cash Frenzy™

Casino mobile games favor **exaggerated live action** creatives.



[Click to play](#)

Over **92%** creatives in H1 were **video creatives**.



Top Casual Games by Advertising



1		Block Puzzle Doodle Mobile	Matching	11		Dream Piano Eyugame	Music
2		Resortopia DH Games	Business	12		Find the Difference Cleverside	Puzzle
3		Purrfect Tale DH Games	Business	13		Hidmont Cleverside	Puzzle
4		Wordle! Lion Studio	Words	14		War Robots Multiplayer Battles Pixonic	Shooter
5		Animal Restaurant DH Games	Business	15		Bright Objects Cleverside	Puzzle
6		Kingdom Guard Tap4Fun	SLG	16		Sniper 3D Wildlife Studios	Simulation
7		Slots GoldenHoYeah IGS	Slots	17		Royal Match Dream Games	Match-3
8		Rabbit Empire Yojoy Game	Idle	18		Tap Music 3D Eyugame	Music
9		The Soul Guardian KONGGAMES	Card	19		Cross'em All Netmarble	Action
10		Case Hunter EYEWIND	Puzzle	20		Idle Magic Academy Longames	Puzzle

1		Coin Pet ASIA YUTAI NETWORK	Slots	11		Project Makeover Magic Tavern	Makeup & Beauty
2		Car Fix Tycoon SONOW	Simulation	12		Crazy Fox ASTAK TECH	Party
3		Mafia City Yotta Games	SLG	13		The Ants StarUnion	SLG
4		Coin Master Moon Active	Party	14		Last Shelter IM30.NET	SLG
5		Homescapes Playrix	Puzzle	15		Family Island™ Melsoft Games	Farm
6		Rise of Empires IM30.NET	SLG	16		ColorPlanet® Games Vessel	Coloring
7		Money Rush Rollic Games	Hyper-Casual	17		Moneyland Rollic Games	Hyper-Casual
8		Gardenscapes Playrix	Puzzle	18		Paintist Plus ColorFun Apps	Coloring
9		Mega Tower Youloft Tech	Tower Defense	19		Chapters Crazy Maple Studio	Romance
10		Evony Top Games	SLG	20		Ball Sort IEC	Hyper-Casual

Top Casual Games by Download & Revenue

Download

Revenue

Download

Revenue

1		Subway Surfers Sybo Games	Parkour
2		Count Masters AIBY	Hyper-Casual
3		Magic Tiles 3 Amanotes	Music
4		Water Sort Puzzle IEC	Puzzle
5		Candy Crush Saga King	Match-3
6		Brawl Stars Supercell	Action
7		Royal Match Dream Games	Match-3
8		Going Balls Supersonic	Hyper-Casual
9		Arrow Fest Rollic Games	Hyper-Casual
10		Ball Run 2048 KAYAC	Hyper-Casual

1		Candy Crush Saga King	Match-3
2		Coin Master Moon Active	Party
3		Brawl Stars Supercell	Action
4		Royal Match Dream Games	Match-3
5		Toon Blast Peak Games	Match-3
6		Candy Crush Soda Saga King	Match-3
7		Empires & Puzzles Zynga	Match-3
8		Toy Blast Peak Games	Match-3
9		Farm Heroes Saga King	Match-3
10		Phase 10: World Tour Mattel163	Board

1		Bridge Race Supersonic	Hyper-Casual
2		My Talking Tom Friends Outfit7	Simulation
3		Candy Crush Saga King	Match-3
4		My Talking Angela 2 Outfit7	Simulation
5		My Talking Tom 2 Outfit7	Simulation
6		Going Balls Supersonic	Hyper-Casual
7		My Talking Angela Outfit7	Simulation
8		Bubble Shooter Bubble Shooter	Puzzle
9		Ball Run 2048 KAYAC	Hyper-Casual
10		My Talking Tom Outfit7	Simulation

1		Coin Master Moon Active	Slots
2		Candy Crush Saga King	Match-3
3		Gardenscapes Playrix	Puzzle
4		Homescapes Playrix	Puzzle
5		Candy Crush Soda Saga King	Match-3
6		Township Playrix	Farm
7		Project Makeover Magic Tavern	Makeup & Beauty
8		Family Island™ Melsoft Games	Farm
9		Hay Day Supercell	Farm
10		Best Fiends Seriously Digital Entertainment	Match-3

Trends of Hyper-Casual Mobile Game Creatives

A combination of multiple elements makes hyper-casual creatives funnier, arousing users' interest to play the games.

To show how easy they are to play, most creatives of hyper-casual mobile games are about gameplay. The formats are more diverse than other game genres.

Pin pulling puzzles, live action, show-how, contrast, ending in failure are the common patterns used in hyper-casual game creatives which are sometimes added with other elements such as extreme weather conditions and poor leading characters.



Nail Salon 3D



[Click to play](#)



Drift Park



[Click to play](#)



Wordox



[Click to play](#)

Popular Hyper-Casual Mobile Game: Brain Out



Brain Teaser
Puzzle

- Total Duration (in days): 1000+
- H1 Deduplicated Creatives: 7400
- H1 Estimated Downloads: 26M
- Top Countries/Regions by Advertising:
USA, Canada, France, UK, Taiwan (China)

[Brain Out]
Advertising Trends in H1 2022



Popular Hyper-Casual Mobile Game: Brain Out



Trends of Snapchat Mobile Game Creatives

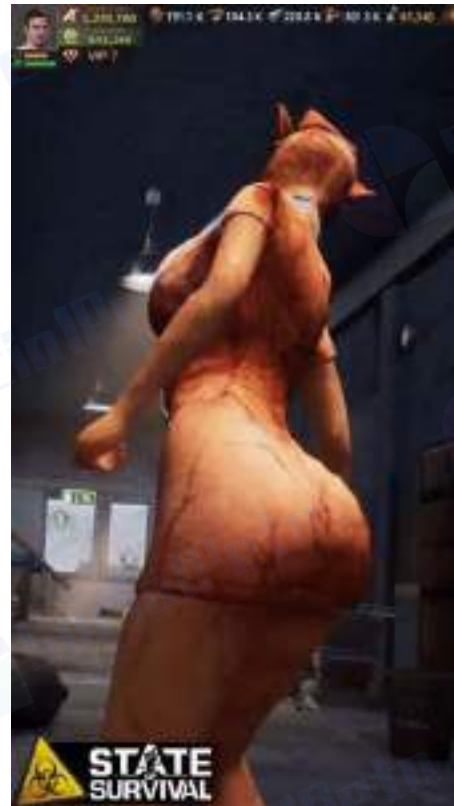
Multiple Narrative Perspectives

Several ad formats are combined to tell brand stories from multiple narrative perspectives



Immersive Experience

Vivid scenes are recreated for astonishing sensual experience that would make gamers fall for it in no time.



Interactive Display

Make conversation with gamers to bond with them so they would be more willing to participate.



AR Brings Characters Back

AR filters allow gamers to become in-game characters, making the games more appealing.



Snapchat's Golden Rule for Game Creatives



Instant Impact

Control the length of videos/Display key info within the first 5 seconds



Use In-game Characters

Use the characters/content that are easy to recognize



Single Info

Convey simple and clear info/CTA is shown directly



Sound Design

Improve the effect through purposeful sound design



Snapchat's Success Case: CSR 2

CSR 2 worked with Snapchat to simulate CSR car racing in game. The creative team designed a chain of instructions in camera to make it a filter ad that is highly playable and shareable.

AR Filter
Role Playing



Snap Ad
Gameplay



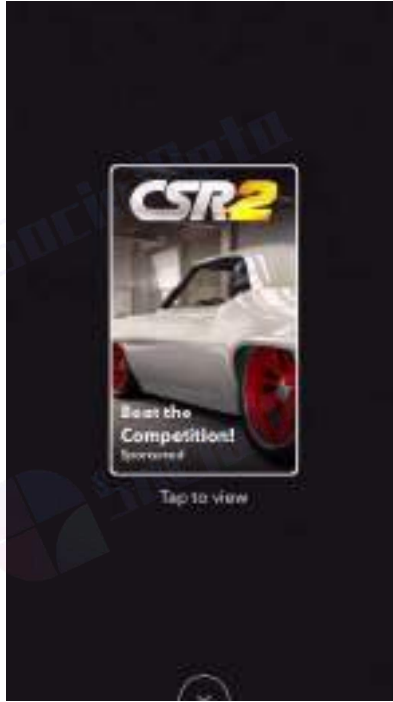
Snap Ad
Gaming Experience



Story Ad
Story Telling



Story Ad
Game Highlight



ACGN Games: Originate in Japan, Thrive in China



With mature research, development technologies and strong self-development ability, Chinese ACGN game companies have started to compete globally.

- “Azur Lane” beat “Kantai Collection”, a Japanese game of the same type, to become the top 1 game in the market segment.
- On the first day after its release, the Japanese version of “Arknights” topped the App Store’s free game chart, and its in-game events were well-received.
- “The Divine Damsel of Devastation”, a performance by the character Yun Jin from “Genshin Impact”, went viral on social media, greatly increasing the popularity of Peking Opera among global gamers, becoming a successful example to showcase Chinese culture globally.

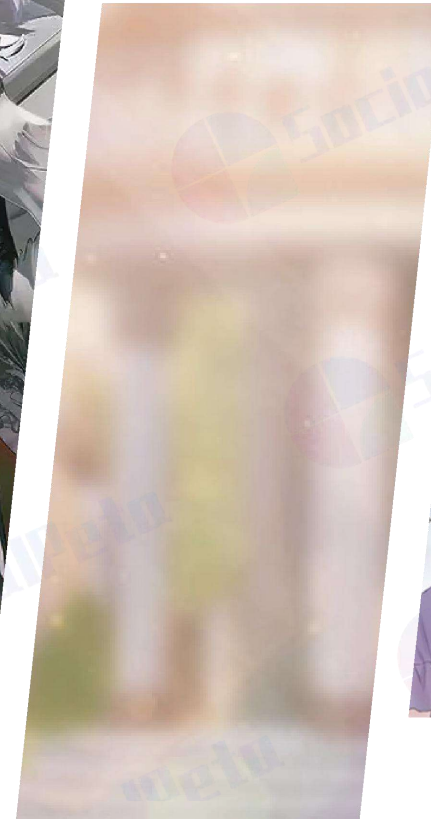


ACGN Games: Big Games are Coming from China

A large number of ACGN games are under research and development in China

According to the Chinese version of TapTap, there are over 145 “ACGN” games that are unreleased. Thanks to the popularity of the previous ACGN games, several to-be-released big mobile games including “Wuthering Waves”, “Arknights: Endfield”, and “Honkai: Star Rail” have also attracted a lot of attention.

There’s a limit on the number of games approved each year in China, so some game companies would choose to release their completely developed games on Steam or even release the corresponding international versions. Some of the games have achieved brilliant performance in the market.



Metaverse: Starting with Games of the Highest Profitability

Biggest user group in the future: Generation Z

Generation Z is a group of consumers who have been seamlessly connected to the Internet since they were born, and therefore greatly influenced by informatization and digitization. Metaverse games are expected to gain greater acceptability among them.

A strong increase in the demand for online entertainment driven by the pandemic

The COVID-19 pandemic broke out in 2019 has greatly changed the daily lives of people around the world to result in a demand surge for pan-entertainment and social games.

With the normalization of COVID-19 pandemic prevention and control measures, metaverse games have begun to take shape and are one of the most promising metaverse markets.



More Gamers Wish to Play Metaverse Games in the Future

39% of gamers wish to play metaverse games

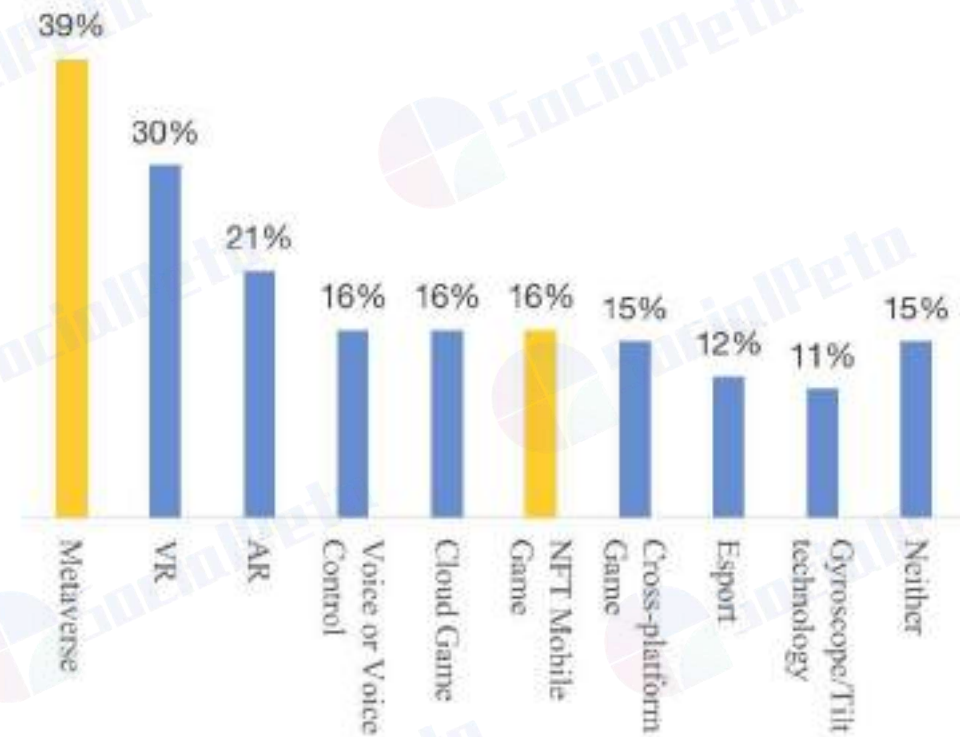
According to the “Mobile Insights Report 2022” recently released by Google, there are 32% of interviewed gamers hope to see metaverse used as a new technology in games.

Only 16% of gamers wish to play NFT mobile games

NFT mobile games had caused a sensation in gaming industry, but are not so much expected as metaverse games. According to the report, only 16% of interviewed gamers would like to play NFT games.

The report also mentioned that a majority of gamers still pursue to [get relaxed and kill time](#) by playing games.

New technologies that are expected to be in future games





Partner Perspectives

Media, platforms, partners, and game companies.

From social marketing on Snapchat to the three major opportunities in the globalization of mobile games

"Interest" boosts game content spending. Recommendation from friends is a marketing approach that is more trustworthy and can reach higher-quality gamers. Snapchat mainly provides services for friends to socialize, so it has a very high stickiness of users who like to interact and share with each other. Meanwhile, friends on Snapchat have 4 times more influence on users' purchase decisions than celebrities and influencers.

Game content spending shows a growing tendency, and AR marketing has become the new trend. AR has become a daily routine for users on Snapchat. 75% of Snapchat users interact with AR filters every day, averagely over 6 billion times of interactions with AR in total each day. Compared to non-AR marketing, AR marketing brings nearly 2 times more attention, highly triggering gamers' memories about the brands which will reach a stronger reaction.

And, Snapchat AR provides experience that is 1.7 times more immersive than other platforms, which makes it more helpful in enhancing the link between brands and users. AR can help link target users with games, whether they are casual games, mid-core and hard-core games, or even console games.

Analysis of the trends of advertisement and monetization of the global mobile game market in 2022

Because of Apple's new privacy policy, advertisers have focused more on three pillars: advertising creatives optimization, context bidding, and exploration for new customer acquisition channels.

Advertisers have paid more attention to designing and optimizing creatives in order to improve the performance of marketing campaigns. Advertisers would try all kinds of advertising forms, and achieve more comprehensive key indicators of creatives through third-party data companies and advertising creatives analytic companies. Because it has been getting more difficult to obtain hierarchical data of advertisement objects, most advertising platforms are using SKAN conversion values and context bidding as a solution to maintaining advertising effects.

Chartboost DSP's machine learning also has accumulated hundreds of context signals, which can be used in algorithm models to locate target users at suitable prices and help advertisers to achieve the highest returns on investment.

To deal with the advertising challenge brought by Apple, advertisers are exploring for new customer acquisition channels, such as Amazon, attempting to attract more new users of high quality. Advertisers can pay for a relatively low CPI to acquire European and American users that have a high retention rate and a high spending rate, and future expand their customer size.

Through Chartboost DSP and context bidding, casual and hyper-casual games have achieved remarkable effects on Amazon Blue Ocean platform. To ensure a stable growth of marketing income, game developers also have made many efforts and adjustments in marketing as more importance is being attached to privacy.

We will pay constant attention to the trends of advertisement and monetization of the global mobile game market in 2022. People working in the mobile game industry will work hard to get established in the new environment and under the new rules, seeking to do better and be better.

Privacy changes had a big impact on the mobile game industry. In order to find success in this new era, mobile game companies need to adopt a **people-first approach**. Getting to know your players and building direct connections is essential for a holistic business strategy.

Currently, there are more than **3 billion gamers worldwide**. According to Newzoo, that number will grow to 3.7 billion by 2023.

Since such a large portion of the global population plays games, it's evident that gamers are a very diverse audience. For that reason, game publishers and marketers need to gain a deep knowledge of gamer demographics, interests, and behaviors.

A big mistake mobile game marketers make is sticking with the same target audience consisting of a very small and limited group of players. This approach makes it **harder and harder to acquire users**, especially when you consider how saturated the market is.

It's like fishing for players in a very small pond.

The solution is to expand that pool. In other words, the key to growth is **audience expansion**. Marketers need to find a way to acquire new players in an oversaturated market as well as in the post-IDFA world.

A great way to achieve that is to leverage player motivations when advertising a mobile game. This creative approach allows publishers to reach a much larger and more diverse audience of players.

It's about knowing **why people play mobile games** and matching their motivations with game advertising to form a more user-centric and personalized ad strategy. For example, some enjoy the social and competitive aspects of mobile games, while others just want to relax and unwind. The key is in designing ad creatives based on these specific motivations.

This results in more growth, not just in terms of downloads, but in monetization opportunities as well.

Traditionally, the best monetization method(3) was to sell the game or related merchandise. In the early era of game monetization, the freemium model came to dominate the likes of Candy Crush Saga and Clash of Clans. This was particularly exciting for the developers of hyper-casual games who could offer more to the gamers through in-app purchases and micro-transactions to break gamer fatigue. Gradually, advertising models also made in-game monetization opportunities wider. With creative ad formats such as Playable and Rewarded Video, advertisers could do more with advertising their games and fight banner blindness.

As brands and advertisers rethink their mobile game advertising and marketing strategies post the pandemic to reach the users, mobile gaming is opening new avenues for Indian advertisers to reach their users in ways they haven't explored before. As the Indian hardcore gamers change, we can expect a greater amount of users who would like to taste the premium offerings of their preferred games. Regular or casual gamers don't mind seeing ads in return for gaming advantages.

With gaming moves beyond the Metro and Tier-1 cities, so should your marketing. Consider vernacularization of marketing efforts to penetrate the Tier II & III markets. Adding vernacular content helps to not only have a wider reach, but also opens new ways of monetization. Companies like WinZo Games(4) have taken to vernacular Esports to reach the Tier-2 and Tier-3 cities and boasts 5 million installs in just one year. One of the interesting approaches they applied was recognizing the gap in in-app purchases in a diverse market like India and came up with a micro-transaction-led social gaming platform(5). Advertising on OEM inventory can help in penetration in Tier 2-Tier 3 markets as the vernacular audiences or the Bharat users are most likely to be found by taking advantage of OEM integrations.

This is an exciting opportunity for advertisers in gaming to buy and scale with an ad partner using a wide range of creative formats under one platform(6). Utilize programmatic channels and OEM recommendations on a full-stack unified platform to run campaigns and make an impact in front of a highly discoverable engaged audience.

Sources: (1) - The Print, (2) & (6) - MAAS website content, (3) - The National Law Review, (4) - Zeebiz, (5) - YourStory

Partner Perspectives

game factory

In 2021, 236 million dollars were invested in the Turkish game industry. 54 Turkish game startups received investments, and the game industry became the leading industry with the highest number of investments in the Turkish startup ecosystem. In the first half of 2022, investments in the Turkish gaming industry exceeded 500 million dollars. This year, investments in blockchain games stand out among the investments made so far.

6 startups from Turkey became unicorns until this day. 2 of these 6 startups are game companies. In the year's second half, I expect more investments to happen and one more unicorn to appear. One of the crucial needs of the Turkish gaming industry is a qualified workforce. Upcoming generations in Turkey are interested in the game industry. Each year more and more game development and design faculties open, and new communities and academies launch. But we are still far from meeting the demand. More workforce is needed in such a rapid-growing industry.

MOBIDICTUM

The mobile game scene is becoming more fierce. Ad revenues are dropping. IDFA changes by Apple are making the marketer's job harder; the competition gets heavier. The hyper-casual scene is not easy as in 2018. At this moment, I believe publishers will look for alternative channels for marketing. Big publishers will heavily invest & acquiring smaller studios to get their player base. We will see more consolidation in the future.

As it comes to the Turkish market, the country will continue to grow, creating an environment for young talent with creative ideas and ambitions. This should attract more investments to the country and help make successful studios.

SocialPeta -- the world's leading advertising and marketing platform



Provide real-time updates of global market trends, and insights into competitors' advertising data, promotion/monetization strategies, and cost-efficient ways to acquire global customers.

Broad

Platform, coverage of countries/regions, analysis dimensions

Large

Data size

Rapid

Data updating

In-depth

Intelligent recommendation, self-developed algorithm



Over 1.2 billion advertising data



Covering 5.1 million advertisers



Multidimensional in-depth analysis of products



Exclusive data and traffic intelligence



Covering 72 countries/regions and over 90 channels worldwide



Updated hourly
Over 1 million ad data are updated each day

90% of top companies have chosen to use “SocialPeta”



Follow SocialPeta on LinkedIn

for more latest information and insightful reports about mobile apps



White Paper



Webinar/Events



Industry Insights



Follow SocialPeta Via QR Code

Top Charts



Trending News



Corporate Culture



H1 2022
GLOBAL
MOBILE
GAME

THANKS FOR WATCHING
